How to Market When LED Purchasers are From Mars

ENERGY STAR Products Partner Meeting

October 29, 2014
In-Store Survey Method
Light Bulb Purchases are mostly planned (but not necessarily the type)

Q2: Plans to Purchase a Light Bulb Prior to Arriving at Store (n=45)

Yes, 56%

No, 44%
Bulb Type Replacement

Q4. Bulb Being Replaced by LED
(n=41; multiple responses accepted)

- **Incandescent**: 54%
- **CFL**: 24%
- **Halogen**: 9%
- **Other**: 13%
LED Purchase Volume

Q5. Number of LED Bulbs Purchased in Last 12 Months
    (n=41)

- 1-5: 41%
- 6-10: 13%
- 11-15: 15%
- 16-20: 11%
- 21+: 9%
Approach to New Technologies

[Diagram showing LED adoption versus normal diffusion]

1) Innovator: pay premium to try newest gadgets
2) Early Adopters: selective but ahead of the curve
3) Early Majority: wait for bugs to be worked out
4) Late Majority: adopt technology to avoid falling behind
5) Laggards: resist change, prefer tried and true

Q6. Which of the following statements comes closest to how you feel about new technology? (n=57; multiple responses accepted)
Barrier to Purchase

- Our home is already energy efficient (89%)
- Home comfort is a top priority (65%)
- “We have already done as much as possible to save energy in our home” (43%)
Conclusions

In-store displays can convert

Target early adopters

One is never enough
Implications for Outreach

• Message LED attributes to counter barriers
• Cool factor
• Multi-pack appeal
• We’re not done yet
  (even if we have made some efficiency upgrades)
Creative With LED Attributes

BEAUTIFULLY BRILLIANT
LED bulbs instantly achieve full brightness.

CURIOUSLY COST EFFECTIVE
LED bulbs last up to 25 times longer than incandescent bulbs.
Learn more at MassSave.com/Lighting

ELEGANTLY EFFICIENT
LED bulbs are 75% more efficient than standard bulbs.
Learn more at MassSave.com/Lighting
Early Adopter Creative

ELEGANTLY EFFICIENT LEDs
Smart looks and cutting-edge technology that saves you money.
Learn more at MassSave.com/Lighting

- Your Washer
- Your Thermostat
- Your Bulb
Future Research

• How rapidly is LED penetration increasing?
• What is in the other sockets within LED purchasers’ homes?
• What kind of socket shifting is occurring?
• What are reasons for replacing CFLs with LEDs?
• What end-use types are not yet converted to energy-efficient bulbs and why?
• When to shift messaging beyond Early Adopters?
Thank You

• For additional information, contact:
  – Cheryl Winch, Cadmus, cheryl.winch@cadmusgroup.com
  – Mark Michalski, Cadmus, mark.michalski@cadmusgroup.com
  – Kristen Pomer, NSTAR, kristen.pomer@nstar.com