Air Cleaners: Big Savings Opportunities in Small Market Appliances

Kevin Messner - VP, Policy & Government Relations
October 24, 2012
ENERGY STAR Partners Meeting
Landscape

- Air Cleaners very important category for many people
  - About 10% ownership
  - Tend to own multiple units
  - Renters more likely to own than homeowners
  - Most commonly used in living areas and bedrooms
  - Most likely a self-made purchase, not a gift
  - Heavily researched, doctor recommended

- Many brands in the marketplace
  - More than 20 manufacturers in AHAM Certification program
Perspective on Energy

- Air Cleaners are not a luxury item
- Health concerns are a top factor for those operating an air cleaner
- Purchases are driven by a desire to improve indoor air quality and reduce allergy symptoms
  - Household problems most common among air cleaner owners are dust and tobacco smoke.

### Primary Reason for Purchase

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve indoor air quality</td>
<td>37%</td>
</tr>
<tr>
<td>Reduce allergy symptoms</td>
<td>25%</td>
</tr>
<tr>
<td>General health reasons</td>
<td>9%</td>
</tr>
<tr>
<td>Reduce odor problems</td>
<td>9%</td>
</tr>
<tr>
<td>Reduce sinus problems</td>
<td>8%</td>
</tr>
<tr>
<td>Reduce asthma symptoms</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
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</tbody>
</table>

AHAM data based on 607 owner responses, 2008.
Perspective on Energy

- 40% of purchasers see Energy Efficiency as very important
- Energy Efficiency more important to females than males
- Ranks behind ease of use, cost, room size, CADR rates

- Seasonality
  - In most cases, they are not used year-round
  - Spring, Fall allergy season are two most important times of year for Air Cleaner Purchases
Marketing the Category

- Education is key to this complex category.
- Heavily researched category!
  - Websites are the most common source of information – over two-thirds seek information from a website of some kind
  - Manufacturer websites, followed by those giving consumer opinions, are the two most frequently visited types
Marketing the Category

- Differences in purchase drivers and perception of household problems exist between genders and ages. These differences may be used to improve targeted marketing:
  - Allergy symptoms and sinus problems are more likely to drive purchase for females and younger purchasers.
  - Females are also more likely to purchase to reduce odor problems.
  - Females and younger purchasers perceive problems with pet dander and pet odors more frequently than males and older purchasers.
  - Older purchasers are more concerned about tobacco smoke.
  - Younger purchasers are also more concerned about musty and moldy odors.
Air Cleaner Certification & Verification

- AHAM has a unique place in the market
- Since 1988, AHAM has certified performance and now verifies performance and energy through CADR program
- AHAM performance test known as Clean Air Delivery Rate (CADR), reduction of tobacco smoke, dust, pollen
- AHAM is an EPA recognized verification program administrator
  - Perform ENERGY STAR verification (Dust CADR/ Watt)
- Displays all ratings and ENERGY STAR applicability on web site- [www.cadr.org](http://www.cadr.org) or [www.ahamverifide.org](http://www.ahamverifide.org)
New AHAM Verifide Brand

- New brand leverages use on multiple products – more than 15 million AHAM Verifide products in market
- Additional promotion and education for Air Cleaners coming
Partnering with ENERGY STAR

- Support Retail Promotion
- Work with ENERGY STAR to encourage utility rebates
- Continue to leverage third-party verification, such as AHAM’s programs
- Continue to cross promote ENERGY STAR and CADR on web sites www.energystar.gov and www.ahamverifide.org

<table>
<thead>
<tr>
<th>Model Number</th>
<th>Room Size (sq. ft)</th>
<th>Dust</th>
<th>Pollen</th>
<th>Tobacco Smoke</th>
<th>ENERGY STAR®</th>
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<tr>
<td>EL490A</td>
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<td>212</td>
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