In Search Of….. - ENERGY STAR Qualified CFL Market Share

National Retailer Data and the National Lighting Tracking Feasibility Study

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Importance of ENERGY STAR Market Share Data

- Key benchmark to determine the success of the national ENERGY STAR program over time.

- Indicator of the success of regional programs and promotions.

- Proof of the cost effectiveness of public funds programs for regulators and policymakers.

- Evidence for manufacturers and retailers of the progress and success of energy efficient product penetration.
Reasons for CFL Tracking Focus

- Substantial ENERGY STAR partner expenditures to promote qualified lamps and fixtures. Utilities and energy efficiency organizations spent over $55 million in 2002.

- Limited availability of retailer sales data when compared to ENERGY STAR appliances.

- Existing national partnership relationships with leading CFL retailers.

- Desire for replacement strategy for collecting regional sales data.
Beneficiaries of CFL Market Data

• Utilities and energy efficiency organizations needing metrics to track program impacts.

• Retailers and manufacturers looking for overall market information.

• National ENERGY STAR program.
• Nationwide coverage of sales allows aggregation of results by:
  • Region
  • State
  • Utility territory

• Centralized and more advanced data collection systems.

• Greater coverage of total lighting market.
Progress of National Retailer Data Collection

- Currently have limited national qualified CFL data - but not enough to release or aggregate.

- Need at least three retailers in all regions to release sales data.

- Coordinating with national retailers to finalize data collection.

- Hurdles we are jumping over:
  - Willingness of retailers to participate
  - acquiring data at a specific enough level to allow all local and regional analysis
  - ENERGY STAR qualified and total lighting sales by store, wattage, model number/UPC number, bulb type
Impetus for the Feasibility Study

- Need of energy efficiency program administrators and organizations to document the market penetration of energy efficient lamps and overall program successes.

- Need to identify new methods of data collection due to changes in national market research firm submissions.
Feasibility Study Conclusions

- Retailer point-of-sale data is key for the necessary market penetration tracking.
- Data by UPC code or model number is necessary to track all necessary characteristics:
  - Wattage
  - Lumen Output
  - Lifetime
  - Bulb Type
- Data should be obtained at the smallest geographic region possible, either ZIP code level or store level.
- Data should ideally be obtained quarterly.
- Ideal scenario is national retailer data combined with local retail tracking services such as ACNielsen and Vista.
Next Steps

• DOE is reviewing the feasibility study and will provide feedback to the authors along with recommended future activities.

• Coordination with national retailers will continue to collect accurate qualified CFL sales data.

• Once all of the data consistency issues are resolved, ENERGY STAR will release a market share report.