

Big Savings Opportunities in Small Market Appliances

The Air Purification Market

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Air Purifier History

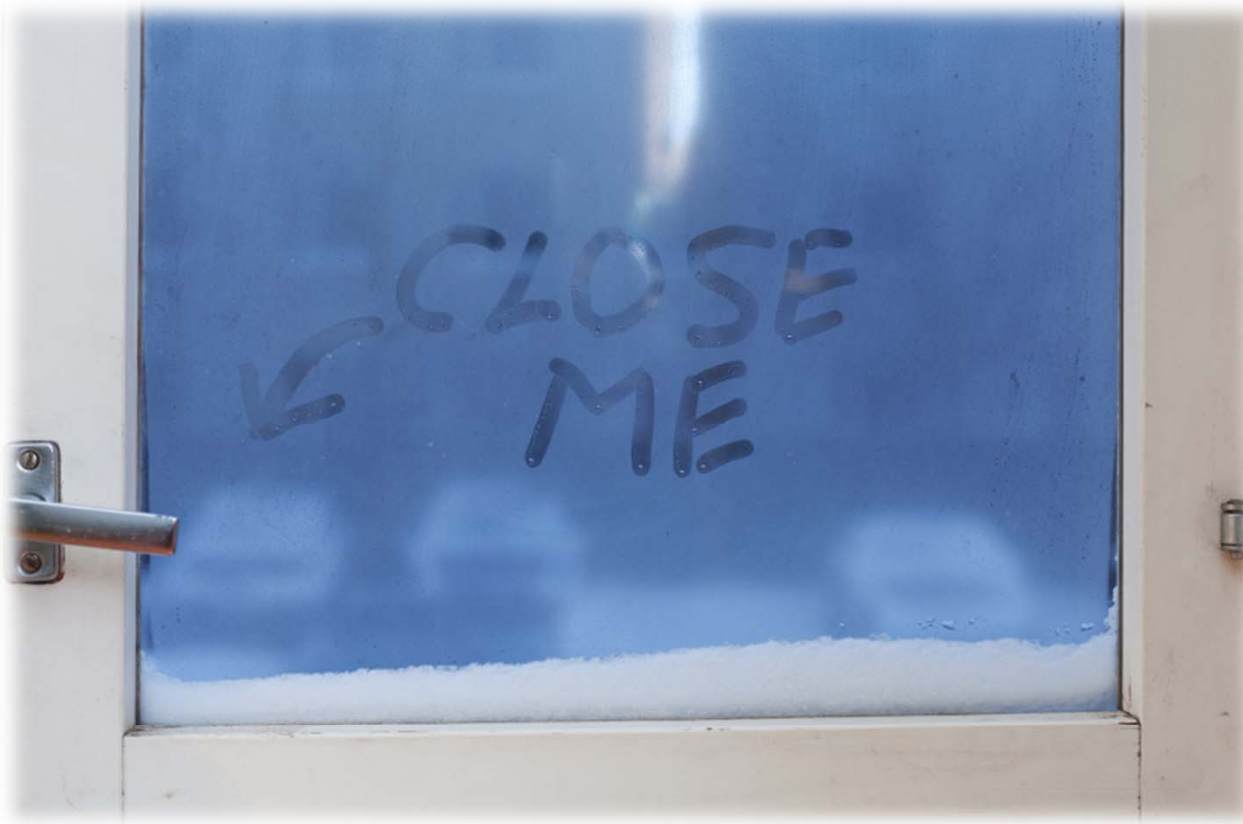
Air purifiers were sold in the 1950s and 60s, but they became more mainstream in the 1970s and 80s.



It is now estimated that approximately **14.5 million**



Strongest Air Purifier usage is during “**Closed Window Season**” and “**Allergy**” season – which vary by region



Air Purifier Consumer Trends



Where are air purifiers purchased?
(unit share)

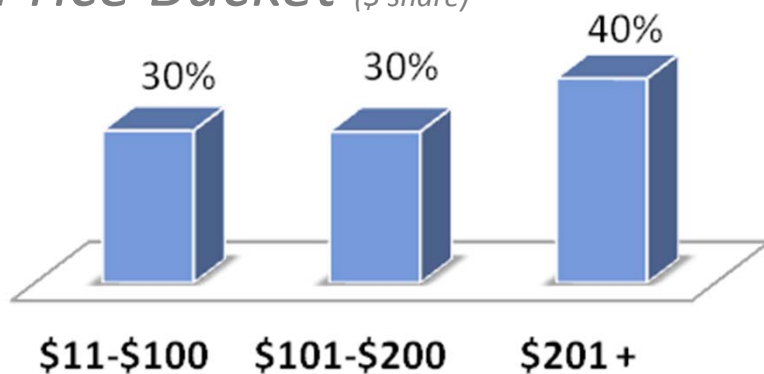
Northeast= 16.7%

Midwest= 18.8%

South= 39.8%

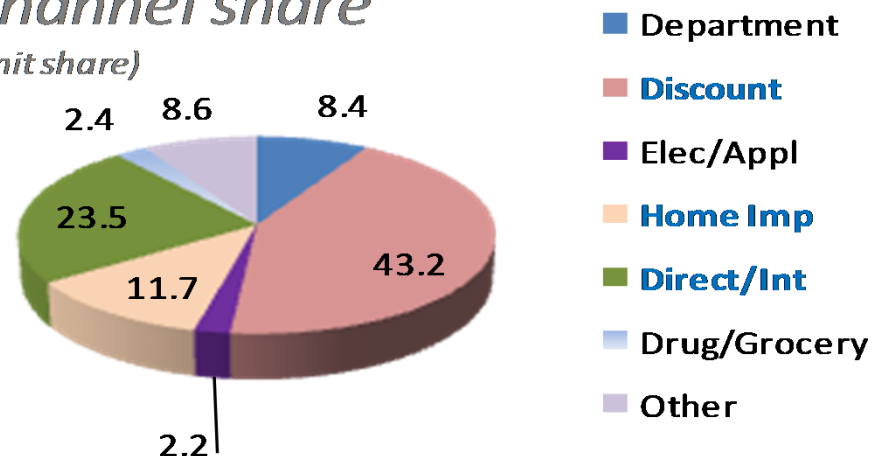
West= 24.7%

Price Bucket (\$ share)



Channel share

(unit share)



Traffic last 4Q ending June 2012

kaz

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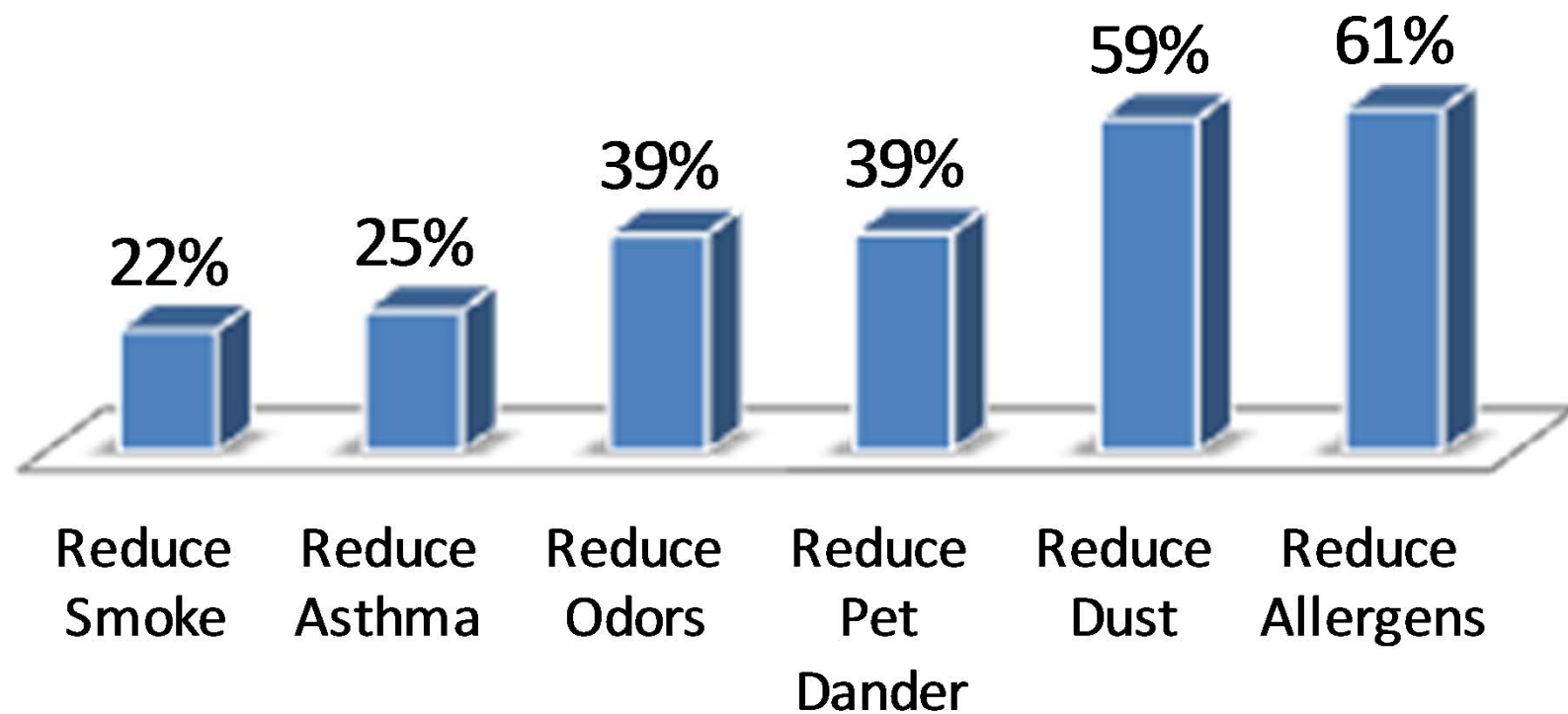
humidifiers

heaters

fans

air purifiers

Air Purifier Consumer Trends



Traqline last 4Q ending June 2012

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humidifiers

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Air Purifier Consumer Trends



Who purchases air purifiers?

(unit share)

Age:

18 – 24 = 7.7%
 25 – 29 = 7.4%
 30 – 34 = 9.5%
 35 – 44 = 19.3%
 45 – 54 = 20.6%
 55 – 64 = 19.5%
 65 plus = 16%

Household:

- 2 or more adults, no child = 46%
- Single adult = 26%
- 2 or more adults w/children = 25%
- Single adult w/children = 3%



44%

56%

Traqline last 4Q ending June 2012

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Air Purifier Purchases are Based on Need

Medical



- 60 million Americans are affected by nasal allergies
 - Almost 26 million Americans have asthma
-

Special Needs



- 62% of U.S. households own a pet, which equates to 72.9 million homes
 - About 1 in 5 American adults smoke cigarettes
-

Cleaner Home



- Dust and odors are generated in every home!
- People spend approximately 90% of their time indoors, with roughly 70% of that time spent indoors in the home.

Physicians are Recommending Air Purifiers



75% of Allergists recommend air purifiers to their patients as part of an overall allergy/asthma treatment program.

AQS ACAAI Research Nov 2010

Scientists are Recommending Air Purifiers



Literature from Scientific Studies reveals that:

- Air purifiers can be an effective way to control airborne exposure to allergens

• *Custovic et al. 1998, Green et al. 1999, Cheng et al. 1998*

- Air purifiers can significantly increase asthma free days and reduce unscheduled visits to the doctor or Emergency Room for asthma symptoms

• *Butz et al. 2011, Lanphear et al. 2011*

- The use of air purifiers in the home have been linked to indicators of good heart health (improved ability for blood vessel cells to control blood pressure)

• *Brauner et al. 2008, Allen et al. 2011*

- Air purifier use has been associated with PM_{2.5} reductions of 30-70%. PM_{2.5} is removed up to **7X** faster using air purifiers as opposed to running central air-conditioning alone

• *Brauner et al. 2008, Allen et al. 2011, McDonald et al. 2002, MacIntosh 2008*

Helping the Consumer

- Provide fact based education and awareness
 - Work with key industry influencers
- Provide efficacious products at an affordable price
- Continue to develop more energy saving products

2002

Cleans a 250 sq.
ft. room
Used **138** watts



vs.

2012

Cleans a 250 sq.
ft. room
Uses **38** watts

**= \$300+ savings
over 5 years!**



- Improve usage guidance to reduce product/electricity use
 - Product efficacy and AHAM Verifide™ Program participation are critical to ensure the consumer gets the appropriate air exchange
- Work with partners to improve affordability and remove consumer barriers to purchase
 - Connect with consumers at the point of influence, education and purchase
 - Improve merchandising/communication at retail (boxes, signage, etc.)
 - Offer rebates on ENERGY STAR qualified air purifiers to help offset costs