

Market Share Data

Success, Challenges and Why it Matters

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Why we need Data

- Measure Success
 - *For ourselves*
 - *Program evaluators*
 - *The state legislature*
 - *Rate payers who fund the program*
- Ensure we get credit for the program impact –
Rewarded vs. unrewarded
- Adjust the program in reaction to what is
happening in the market

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What do we need?

- ENERGY STAR® market share – by state
- Brand/manufacturer not needed
- From multiple sources – for triangulation
- Quarterly data



What do we have?

- Self reported retailer data
- National appliance sales data (D&R)
- Appliance Sales Tracking
 - 3,000 HH random digit dial survey – roughly 500 will have purchased a new appliance in the last year
- AHAM shipping data and a one time report market share report (2002)



Self Reported Retailer Sales Data

Pros:

- *It provides us with a glimpse of what is going on with the independents*
- *It tracks well with other available data*

Cons:

- *Retailers are unreliable*
- *It is self reported and the sample is very small (40ish retailers) and inconsistent*



National Sales Data

Pros:

- *It helps us confirm the small sample we are getting from the self reported data*
- *It helps cover the “big boxes” we don’t get reporting from locally*

Cons:

- *Limited number of retailers reporting*
- *Includes retailers not in our region*



Appliance Sales Tracking

Pros:

- *Gives us a actual purchase rates*
- *Works well for refrigerators*
- *Allows us to measure multiple products and general ENERGY STAR awareness*

Cons:

- *Participants are inconsistent/unreliable*
- *Expensive (bi-annual to reduce costs)*
- *Does not work well for clothes washers*



AHAM Data

Pros:

- *Comes from those who know best – the manufacturers*
- *Represents actual shipments*

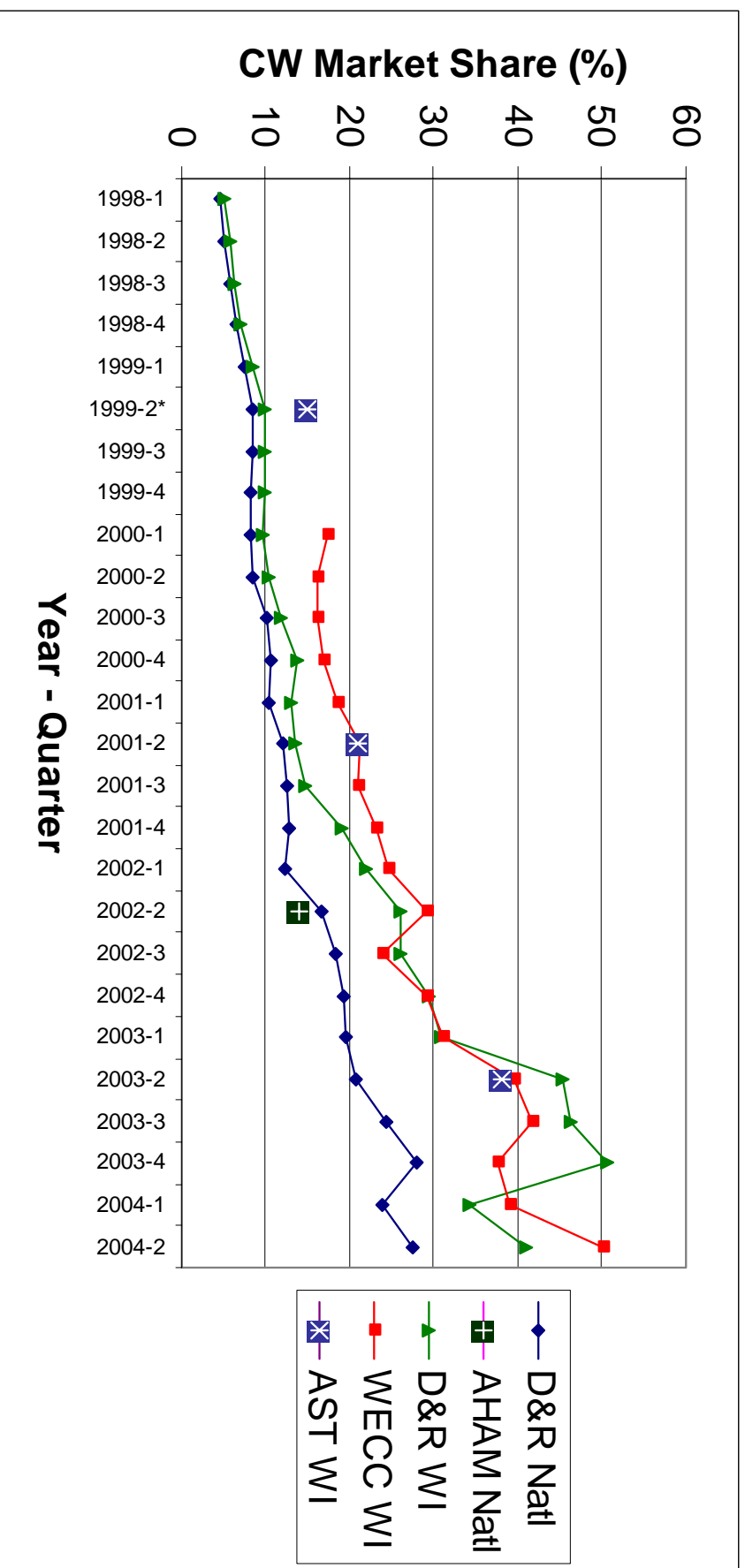
Cons:

- *We have only gotten ENERGY STAR data once at the national level*
- *The other data we get is shipment data only (provided annually)*
- *We may have to pay for the data*

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Current Snapshot





In an Ideal World

Local Level

- We would get every store to send in data
- Consumer approach (web TV) that provides us with awareness and purchase data

National Level

- We would get regular state level data from AHAM
- The national ENERGY STAR program would collect and report manufacturer sales/shipping data by state – similar to the retailer data



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