ENERGY STAR® Products Partner Meeting – Lighting Track
Energy Efficiency Program
Portfolio Updates

Charlotte, NC
November 7, 2011

Marylou Einfalt, ICF International
U.S. Lighting Programs: Offerings

- 423 individual product promotions reported by 138 Energy Efficiency Program Sponsors
U.S. Lighting Programs: Budgets
U.S. Lighting Programs: Eligibility

- Over 91 million residential customers are eligible for some type of ENERGY STAR lighting incentive.
U.S. Lighting Programs: Promotions by Type

- Mail-in Rebate, 127
- Instant Rebate, 59
- Other, 43
- Give-away, 20
- Builder Incentive, 10
- Buy-Down/Discount, 164
U.S. Lighting Programs: Impacts of EISA

- Preliminary partner feedback via Webinar
- Halogens as baseline, raising to CFL levels
- Partner strategies consisting of special promotions, co-operative advertising, lighting controls, etc.
Regional Overview
Northeast

- Over 16.3 million residential customers are eligible for some type of ENERGY STAR lighting promotion
- 18 Program Sponsors provided information
- Most annual lighting program budgets in the Northeast are in the $1-$10 million range
- Lighting Programs are delivered through statewide collaborations
- Partners are collaborating on a Northeast Lighting Strategy
- Clear and consistent consumer messaging is a key goal for 2012
Regional Overview Northeast

Northeast Lighting Promotions by Product
Total = 73

- LED Fixtures 23%
- CFL Fixtures 23%
- Spiral CFLs 11%
- LED Bulbs 6%
- Specialty CFLs 15%
- Other* 9%

Number of Promotions by Types in the Northeast

- Buy-Down/Discount: 35
- Cooperative Advertising: 4
- Give-away: 1
- Instant Rebate: 17
- Mail-in Rebate: 4
- Mid-stream Incentive: 3
- Other*: 9

* Other Products - CFL w/pin base, DLS, Ceiling Fans, Vent Fans, New Construction, and Miscellaneous Commercial Incentives
* Other Promotion Types – Varies or Not Provided
Northeast Regional Snapshot

[Image of CFLs and energy efficiency resources]

SAVING IS A BRILLIANT IDEA!

- CFLs will pay for themselves in less than 6 months.
- Each CFL bulb can save up to $15 a year in energy costs.
- CFLs save up to 75% less energy and last up to 12 times longer than standard incandescent bulbs, therefore reducing replacement costs.

¡AHORRAR ES UNA IDEA BRILLANTE!

- Las CFL (luz fluorescente) se pagarán a sí mismos en menos de 6 meses.
- Cada bombilla CFL puede ahorrar hasta $15 al año en energía.
- Las CFLs ahorran hasta 75% de energía y duran hasta 12 veces más que las bombillas incandescentes, reduciendo el costo del reemplazo.

New York State

[Image of energy efficiency website]

BE THE BRIGHTEST BULB ON YOUR BLOCK

Switch to ENERGY STAR® qualified CFLs to save energy and money.

EPA

Up to 70% off ENERGY STAR® qualified bulbs!

Create a shopping list, then tap on the ‘BUY NOW’ button.

Buy bulbs through the app, and your discounts will AUTOMATICALLY be calculated after you enter your shipping address.

(Discounts available only to Massachusetts residents for home use)
Regional Overview
Mid-Atlantic

- Over 11.9 million residential customers are eligible for some type of ENERGY STAR lighting promotion
- 6 Program Sponsors provided information
- Most annual lighting program budgets in the Mid-Atlantic are in the $1-$10 million range
- Partners in region are largely IOUs, and some co-ops
- In 2012, most partners will include LED lamps and fixtures, and some will offer specialty CFL bulbs and torchieres
Regional Overview
Mid-Atlantic

Mid-Atlantic Lighting Promotions by Product
Total = 27

- Spiral CFLs: 37%
- LED Fixtures: 11%
- CFL Fixtures: 11%
- Specialty CFLs: 22%
- Other*: 4%

Number of Promotions by Types in the Mid-Atlantic

<table>
<thead>
<tr>
<th>Type</th>
<th>Total #</th>
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<tbody>
<tr>
<td>Buy-Down/Discount</td>
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<td>Instant Rebate</td>
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<tr>
<td>Mail-in Rebate</td>
<td>2</td>
</tr>
<tr>
<td>Other*</td>
<td>1</td>
</tr>
</tbody>
</table>

* Other Products - CFL w/pin base, DLS, Ceiling Fans, Vent Fans, New Construction, and Miscellaneous Commercial Incentives
* Other Promotion Types – Statewide Education Effort
Regional Overview
Midwest

- Over 14.8 million residential customers are eligible for some type of ENERGY STAR lighting promotion
- 51 Program Sponsors provided information
- Most annual lighting program budgets in the Midwest are under $1 million, with about 20 under $250K
- Partners include large IOUs and many MUNIs and RECs
- IN jumped into lighting in 2011
- IL, OH, MI continue to ramp up; WI Focus on Energy
Regional Overview
Midwest

Midwest Lighting Promotions by Product
Total - 147

- Spiral CFLs 37%
- LED Bulbs 10%
- CFL Fixtures 10%
- Specialty CFLs 7%
- LED Fixtures 9%
- Decorative Light Strings 7%
- Ceiling Fans 4%
- New Construction 3%
- Other * 13%

Number of Promotions by Types in the Midwest

- Bill Credit: 3
- Builder Incentive: 5
- Buy Down/Discount: 29
- Fundraiser: 0.3
- Give Away: 7
- Instant Rebate: 8
- Mail-in Rebate: 86
- Other *: 6

* Other Products - CFL w/pin base, Vent Fans, and Miscellaneous Commercial Lighting Incentives
* Other Promotion Types - Loan, Mid-stream, Recycling, Trade-in, TBD, Varies
Midwest Regional Snapshot

Take the Pledge Giveaway!

Taking action to save money and our environment begins with one simple step: Take the ENERGY STAR Pledge to replace just one light in your home with an ENERGY STAR qualified bulb. It’s that easy!

By taking the pledge, millions of Americans have reduced the release of billions of pounds of greenhouse gas emissions and saved hundreds of millions of dollars in energy expenses.

Changing your home’s lighting from incandescent bulbs to compact fluorescent light bulbs (CFLs) is one of the easiest, most cost-effective ways you can save energy and reduce your energy bill. Your household will also take advantage of benefits such as:

- Longer bulb life
- Lower energy bills
- Smaller environmental footprint

LED Lighting

- ENERGY STAR certified
- Long life
- Low operating costs
- High efficiency

Ceiling Fans

- ENERGY STAR certified
- Lower energy bills
- Improved ventilation

Lighting Program

- ENERGY STAR LED bulb discounts
- Appliance recycling
- Energy efficiency tips

Environment

- Lower energy consumption
- Reduced greenhouse gas emissions

Save Money & Energy

- ENERGY STAR qualified products
- Incentives and rebates

For more information, visit:

www.ActOnEnergy.com
Regional Overview
Southeast

- Over 14.2 million residential customers are eligible for some type of ENERGY STAR lighting promotion
- 15 Program Sponsors provided information
- Lighting program budgets in the Southeast are mostly less than $250K
- Partners include a mix of investor-, municipally-owned utilities and co-ops, distributors and state and local governments
- CFLs have been king, but 2012 will introduce specialty bulb and LED programs
Regional Overview
Southeast

Southeast Lighting Promotions by Product
Total = 29

- Spiral CFLs 79%
- Specialty CFLs 10%
- LED Bulbs 4%
- CFL Fixtures 4%
- Other* 3%

Number of Promotions by Types in the Southeast

<table>
<thead>
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<tr>
<td>By-Down/Discount</td>
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<td>Recycling</td>
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<td>Other*</td>
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</table>

* Other Products - CFL w/pin base, LED Fixtures, DLS, Ceiling Fans, Vent Fans, New Construction, and Miscellaneous Commercial Incentives
* Other Promotion Types – Fundraiser or Not Provided
Southeast Regional Snapshot

Pledge to do your part to save energy and help protect the environment.

"I pledge to do my part to save energy and help protect the environment."

First Name: __________________________ Email: __________________________

I pledge to:

- Replace ___ (up to 50) standard light bulb(s) in my home with an ENERGY STAR qualified compact fluorescent light bulb.
- Seal air leaks and insulate my home.

SCE&G

Account Sign In

Energy Discounts

ENERGY STAR® Lighting Discounts

Get Instant Discounts on Energy Efficient CFLs

Save today with instant discounts from 50% to 70% off CFLs on select ENERGY STAR® qualified compact fluorescent lamps (no limits).

Find a participating retailer near you

You will receive your discount instantly at checkout in one of two ways:
Regional Overview
Southwest

- Over 9.5 million residential customers are eligible for some type of ENERGY STAR lighting promotion
- 18 Program Sponsors provided information
- Lighting program budgets in the Southwest are a mix of smaller (less than $250K) and larger ($1-$10 million) budgets
- Partners include a mix of investor- and municipally-owned utilities and co-ops
- Some partners introduced LED incentives in 2011; others offering EISA education
- Expect larger lighting program changes in 2012
- Some partners reconsidering lighting programs due to rising baselines
Regional Overview
Southwest

Southwest Lighting Promotions by Product
Total = 34

- Special CFLs: 36%
- Special CFLs: 29%
- LED Bulbs: 9%
- LED Fixtures: 6%
- Decorative Light Strings: 3%
- New Construction: 6%
- Other*: 6%

Number of Promotions by Types in the Southwest

<table>
<thead>
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<tr>
<td>Bill Credit</td>
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<tr>
<td>Buy-Down/Discount</td>
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<tr>
<td>Give-away</td>
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<td>Instant Rebate</td>
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<tr>
<td>Mail-in Rebate</td>
<td>2</td>
</tr>
<tr>
<td>Other*</td>
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</tbody>
</table>

* Other Products - Miscellaneous Commercial Incentives
* Other Promotion Types – Commercial Custom Incentive
Southwest Regional Snapshot

Shoot for a CFL in Every Socket.

- Buy one CFL, get one FREE
- Win a Sun VIP Experience
- Contests; giveaways and more!

Click to learn more.

There's more to the Home & Garden Show than daisies.

Visit Pacific Power at the 2011 Central Washington Home & Garden Show and learn how an energy-efficient home saves money for you and your family.

Xcel Energy and Domino's Pizza bring a bright idea to your door step.

With each Domino's Pizza order, you will receive two free energy saving compact fluorescent bulbs.

When it comes to efficiency, compact fluorescent lights (CFLs) are deliciously efficient. Each and every one is designed to save you energy and money!

Install a CFL and you'll save up to $5 per bulb per year. Even better, with a 7 - 10 year life span—it puts up to $50 back in your pocket. Not only are you saving money, you are making a difference in New Mexico's environment. Don't wait to order your pizza and your free CFLs!

Large Doubles
Two Large 1-Topping Pizzas

$17.99

Add a $2.00 fruit drink or soda with your family meal and get $1 off each drink.

Offer valid only at Xcel Energy of New Mexico locations. Some restrictions apply. Not valid with other offers or promotions. May not be combined with any other offer. ©2011 Xcel Energy.
Regional Overview
West

- Over 29.3 million residential customers are eligible for some type of ENERGY STAR lighting promotion
- 30 Program Sponsors provided information
- Lighting program budgets in the West are large; most have annual budgets of $1-$10 million and two report budgets over $10 million
- In 2011, CA IOUs are running LED pilots as well as continuing to promote basic and specialty CFLs
Regional Overview
West

West Lighting Promotions by Product
Total - 113

- Spiral CFLs: 26%
- Specialty CFLs: 23%
- CFL Fixtures: 17%
- LED Fixtures: 13%
- LED W/BC: 13%
- Ceiling Fans: 11%
- New Construction: 5%
- Other*: 2%
- CFI, w/pin base: 1%

Number of Promotions by Types in the West

<table>
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<tr>
<td>Buy-Down/Discount</td>
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<tr>
<td>Builder Incentive</td>
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</tr>
<tr>
<td>Mail-in Rebate</td>
<td>31</td>
</tr>
<tr>
<td>Other*</td>
<td>6</td>
</tr>
</tbody>
</table>

* Other Products – Decorative Light Strings, Vent Fans, or Miscellaneous Incentives (e.g., Super Lamps)
* Other Promotion Types – TBD, Trade-in, or Not Provided
**West Regional Snapshot**

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**ENERGY STAR® Light Fixture Selection Guide**

There's an ENERGY STAR fixture available to match your décor.

### SIMPLE FACTS
- Bulbs last at least 10,000 hours.
- 8 year lead-frit or 2 year lamp warranty (double the industry standard).
- Decorative options to fit any décor.
- Excellent bulb fit every time.
- Thermal design eliminates “hot spots” in the fixture.

### ADDITIONAL RESOURCES

- Frequently Asked Questions:
  - [Find a Bulb](#)

See more examples at: [www.energystar.gov](http://www.energystar.gov)

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**Operation Lamp Exchange**

- Home
- Events
- Rules
- New Lamps
- Warranties
- Results

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Operation Lamp Exchange is an energy efficiency program that allows residential customers of Southern California Edison to exchange inefficient halogen and incandescent light fixtures for new, Energy Star labeled lamps.
Regional Recap

- Lighting programs offered in every region, variety of delivery methods, varying budgets
- Regions have different approaches, but significant savings in lighting programs remain
- General feedback indicates progressive expansion

Tune in to 1:00PM session on Lighting Portfolio Planning