

4th Annual SYLVANIA SOCKET SURVEY 11.15.2011

Conducted by KRC Research
for OSRAM SYLVANIA



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Executive Summary – Energy and CFLs

Bulb Purchasing

- The most important purchase factors include: brightness, longevity, price and energy – all important to more than eight in ten. However, energy has decreased in importance from 2010.
- Less important, but still considerations for the majority are: color quality, American-made and dimmability.

Bulb Usage

- Similar to 2010 the majority have switched bulbs for increased energy efficiency this year, but more switched for this reason in 2009.
- More use incandescent bulbs than in the past, while CFL usage remains steady (close to seven in ten).
- Total LED stand-alone usage is low, one in eight report having them at home, but usage has increased directionally from 2010 and 2009.

Bulb Options

- Awareness of bulb options has remained stable over the past few years. Halogen remains the most widely recognized but nearly seven in ten are familiar with CFLs.

CFL Bulbs

- The biggest concerns with CFLs include: price, amount of light, and mercury content – concerns to at least one-quarter of consumers.
- Concerns about CFLs have remained steady over time.

Executive Summary – Legislation

Awareness

- In 2011 a majority of Americans reported awareness of the phase out for the first time.
- Those **least** likely to be aware include: Women, Americans age 18-34, consumers with no college degree and lower incomes, and non-Caucasians.

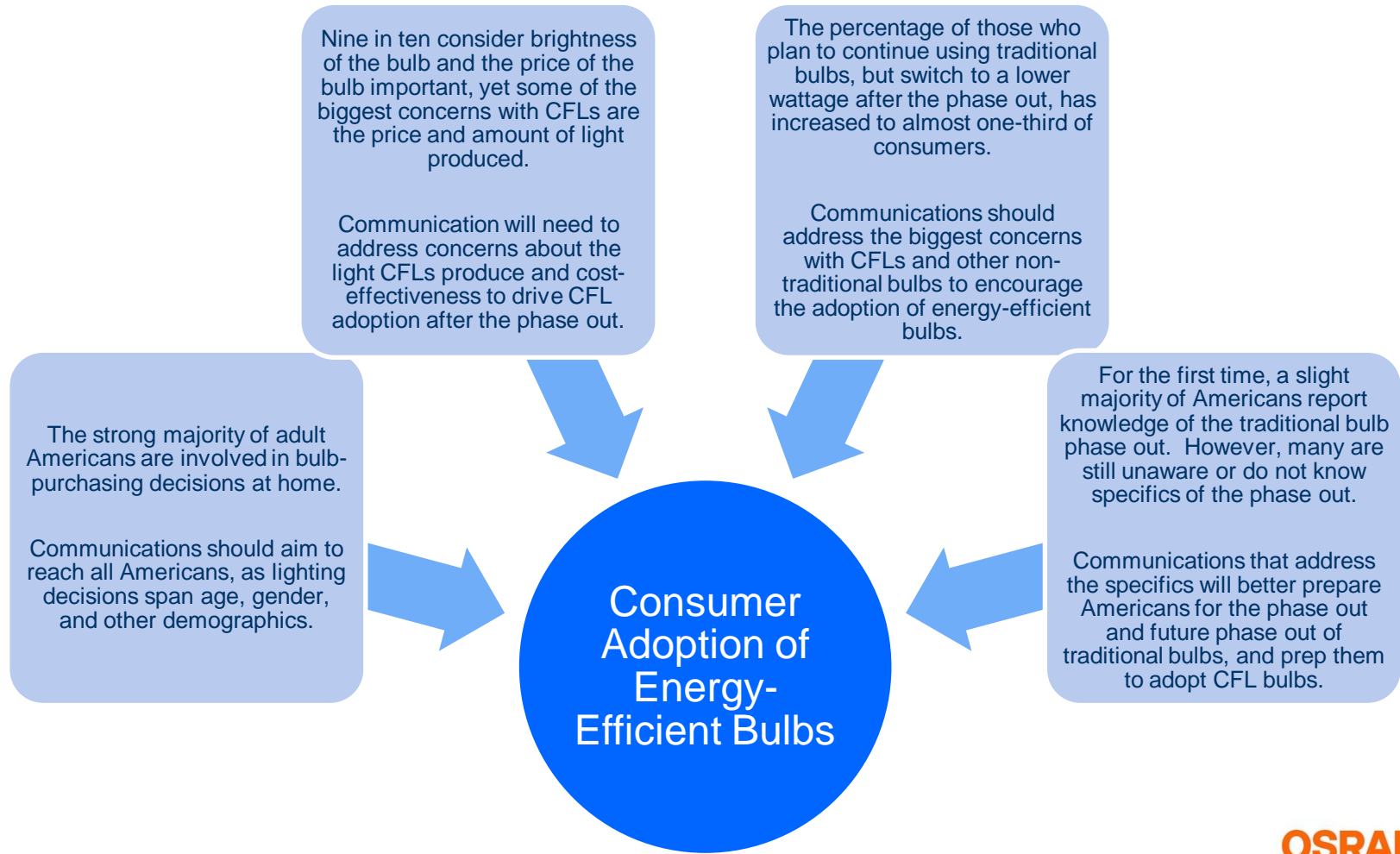
Legislation Specifics

- While more are aware of the elimination of 100 watt bulbs than in the past, awareness is still low – only around three in ten consumers.
- Nearly half are aware that future legislation will continue to phase out traditional bulbs.

Consumer Adoption

- Consumers continue to be most likely to switch to new technology bulbs once traditional bulbs are phased out – half of consumers plan to do this, although more say they may switch to lower wattage incandescent bulbs than in the past.
- The majority report excitement about the phase out, but a sizable minority – at least one-third – are worried.

Executive Summary – Implications



Methodology

	2011	2010	2009	2008
METHOD:	Landline and cell phone telephone survey	Landline and cell phone telephone survey	Landline telephone survey	
DATA COLLECTION:	October 13- 17, 2011	November 20- December 1, 2010	November 6-10, 2009	November 14-17, 2008
SAMPLE SIZE:	303 interviews total (including 76 via cell phone)	309 interviews total (including 77 via cell phone)	302 interviews total	301 interviews total
SAMPLE:	A random sample of American adults obtained through random digit dialing			
MARGIN OF ERROR:	Estimated margin of error is calculated at the 95% confidence level for proportions near 50%.			
	±5.6% for the entire sample	±5.6% for the entire sample	±5.7% for the entire sample	±5.7% for the entire sample

 Indicates statistically significant differences at the 95% confidence level

The Lighting Landscape

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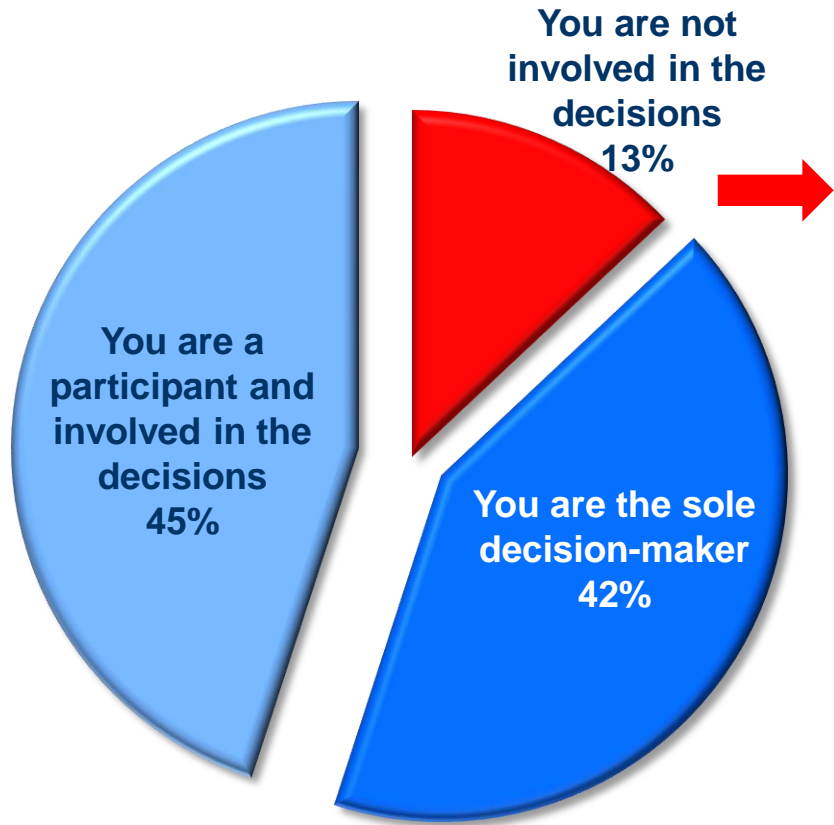


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Nearly nine in ten Americans report that they are involved in light bulb purchases at home.

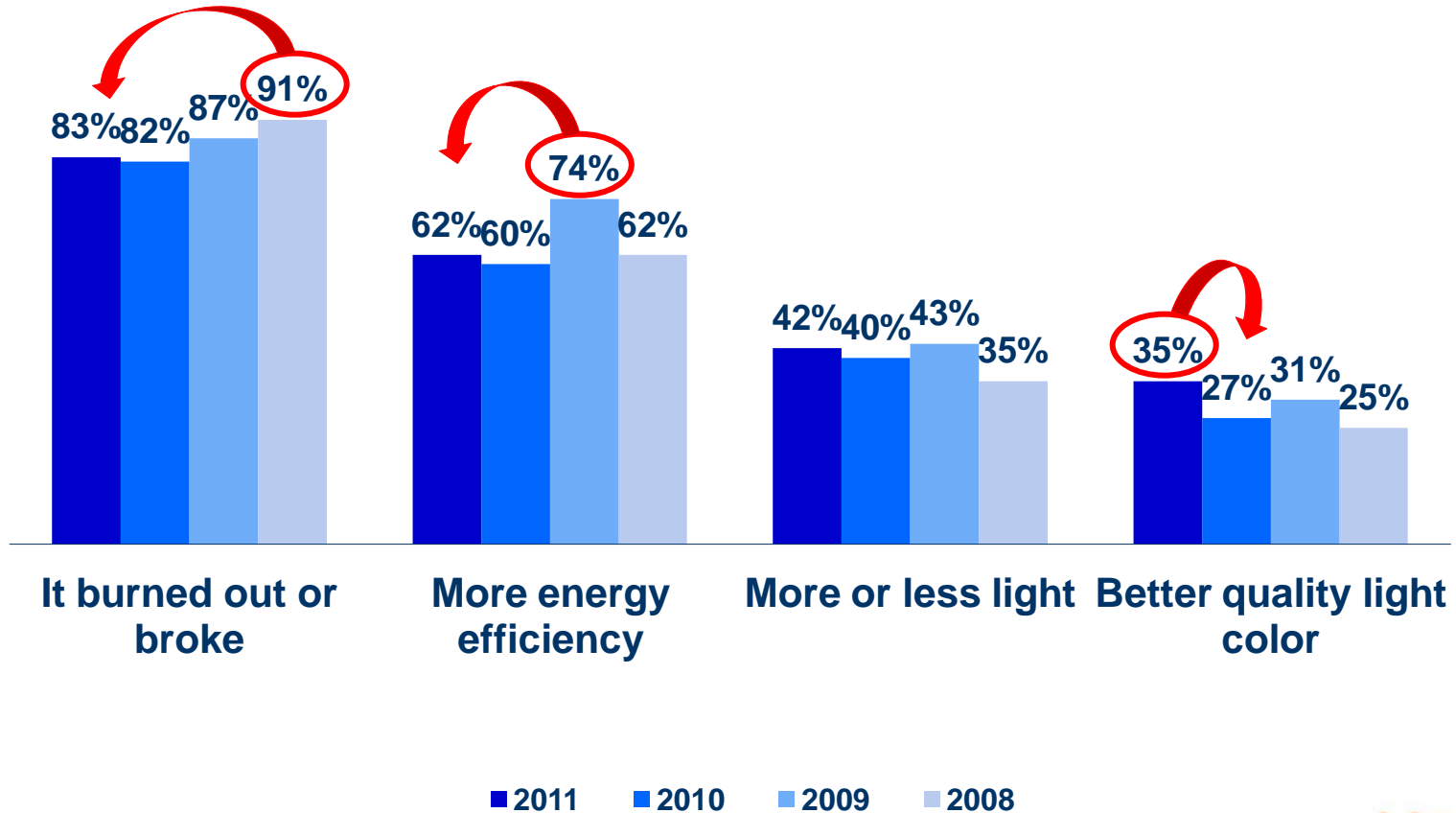
Q2. When it comes to decisions about light bulb purchases within your household, would you say:



- Most likely to say they are uninvolved:**
- **Younger consumers**, age 18-34 (27%) vs. Older consumers, age 35-54 (12%) and age 55+ (7%)
 - **Non-Caucasians** (23%) vs. Caucasians (9%)
 - Those **unaware of the 2014 phase out** (20%) vs. Those who are aware (7%)
 - Those **unaware of the 100 watt elimination** (15%) vs. Those who are aware (7%)
 - Those **unaware of the future phase out** (18%) vs. Those who are aware (6%)

Similar to 2010, fewer consumers switched bulbs for increased energy efficiency this year than in 2009. But, it remains an important switching driver for two-thirds of Americans.

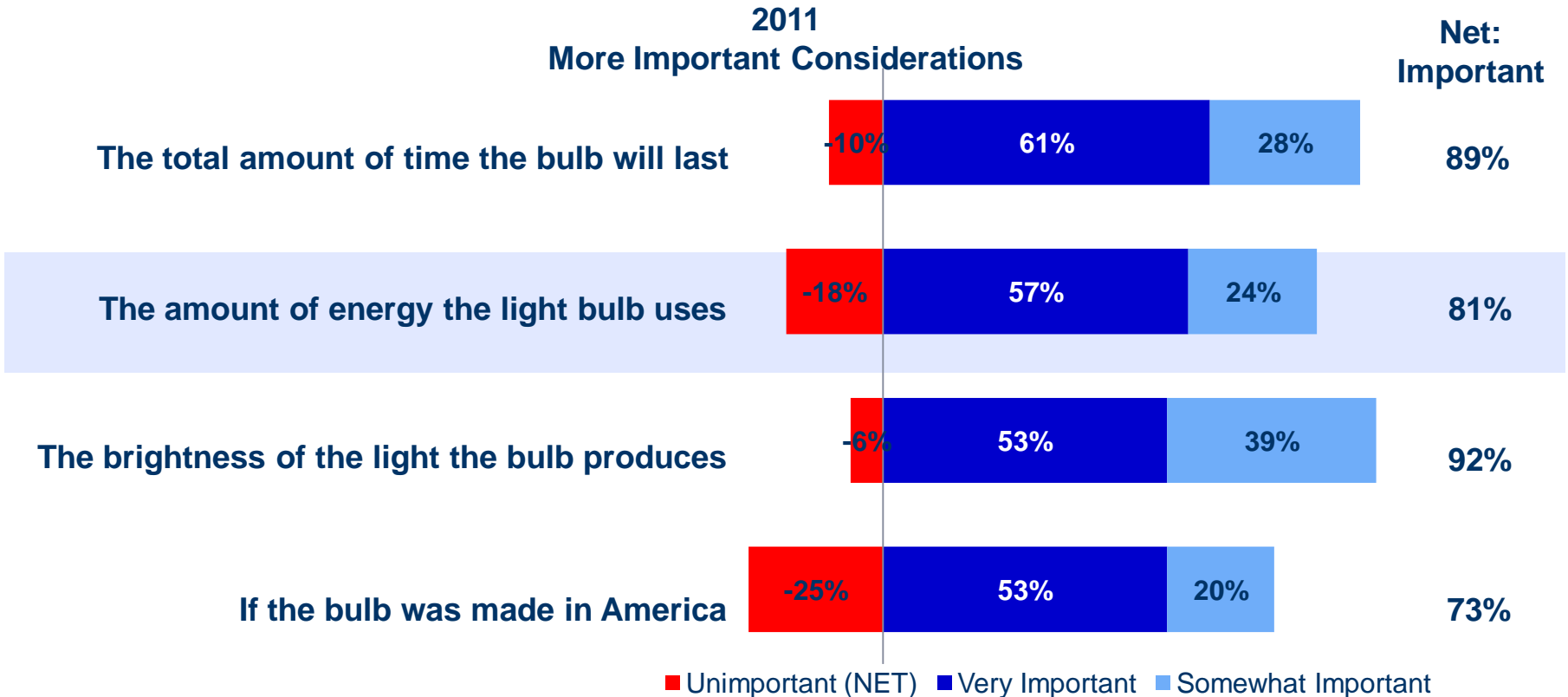
Q3. Please tell me if you have changed or switched out a light bulb for any of the following reasons within the last year:



Base: 2008 N=301; 2009 N=302; 2010 N=309; 2011 N=303

Over half of consumers consider longevity, energy, brightness and American-made very important qualities in bulbs they purchase.

Q4. I'm going to read you a list of various properties of light bulbs some people consider when making purchasing decisions. Please tell me how important each of these is to you personally when you choose a light bulb.

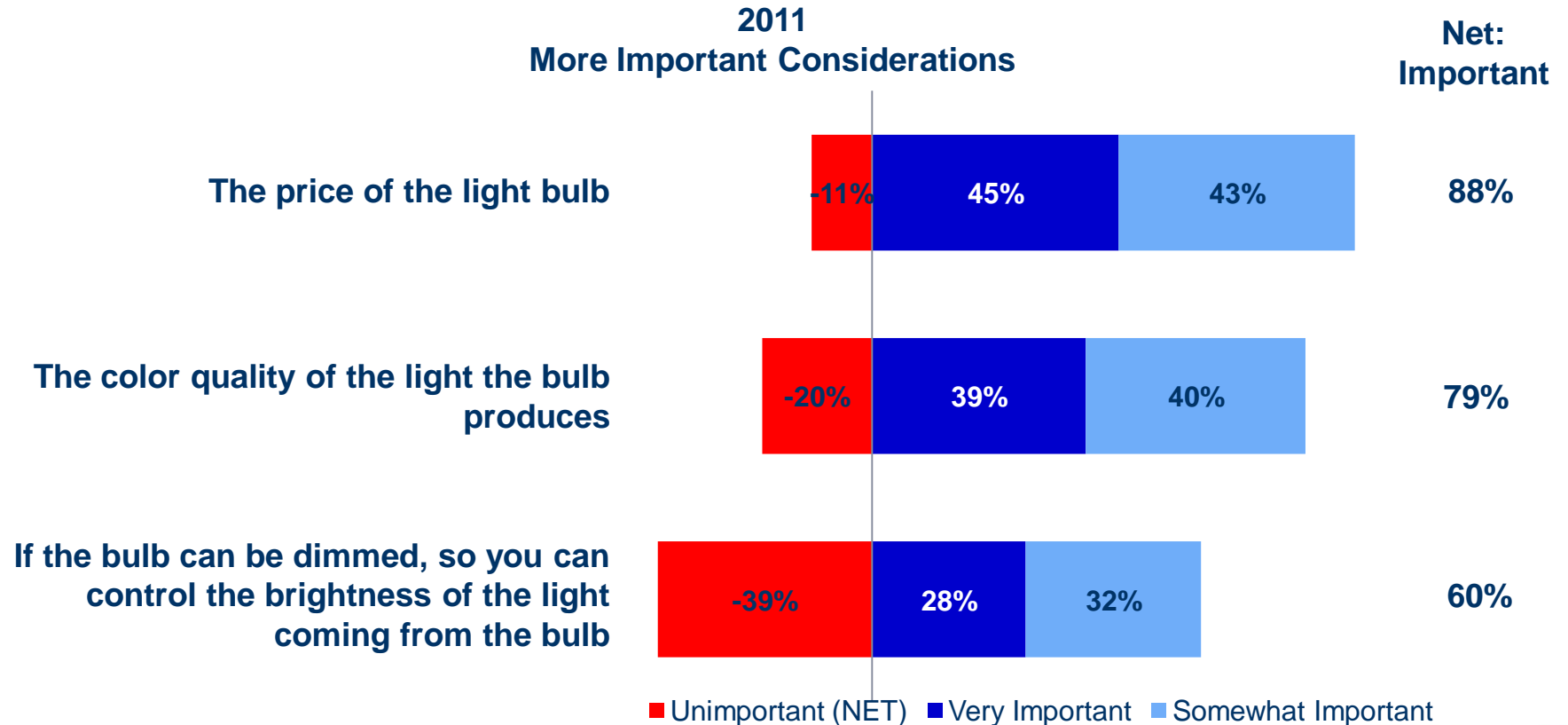


Base: 2011 N=303



Ranked as very important less often, but still considerations for many are: price, color quality and dimmability of the bulb.

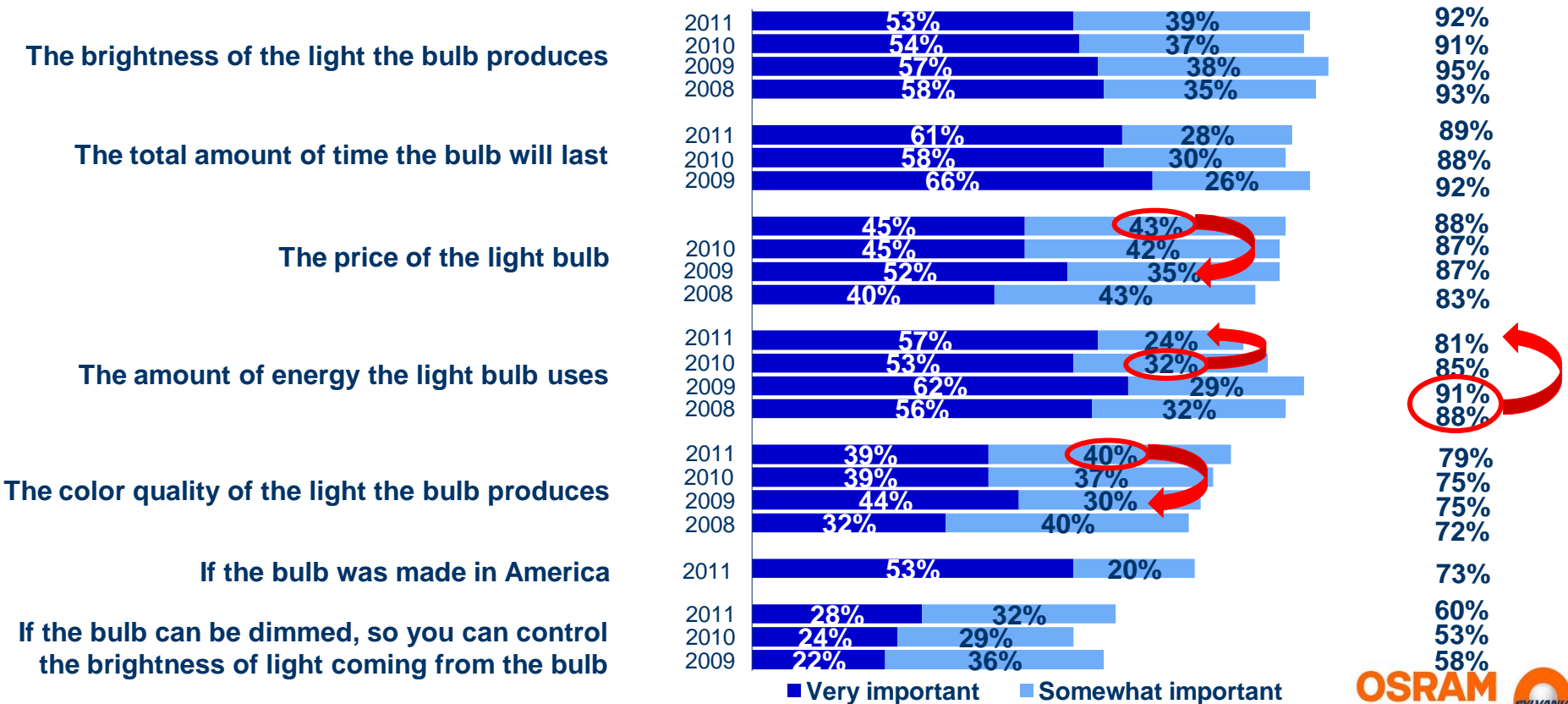
Q4. I'm going to read you a list of various properties of light bulbs some people consider when making purchasing decisions. Please tell me how important each of these is to you personally when you choose a light bulb.



Brightness, the amount of time bulbs last and price continue to be most important to consumers, but energy has decreased in importance.

Q4. I'm going to read you a list of various properties of light bulbs some people consider when making purchasing decisions. Please tell me how important each of these is to you personally when you choose a light bulb.

Net: Important

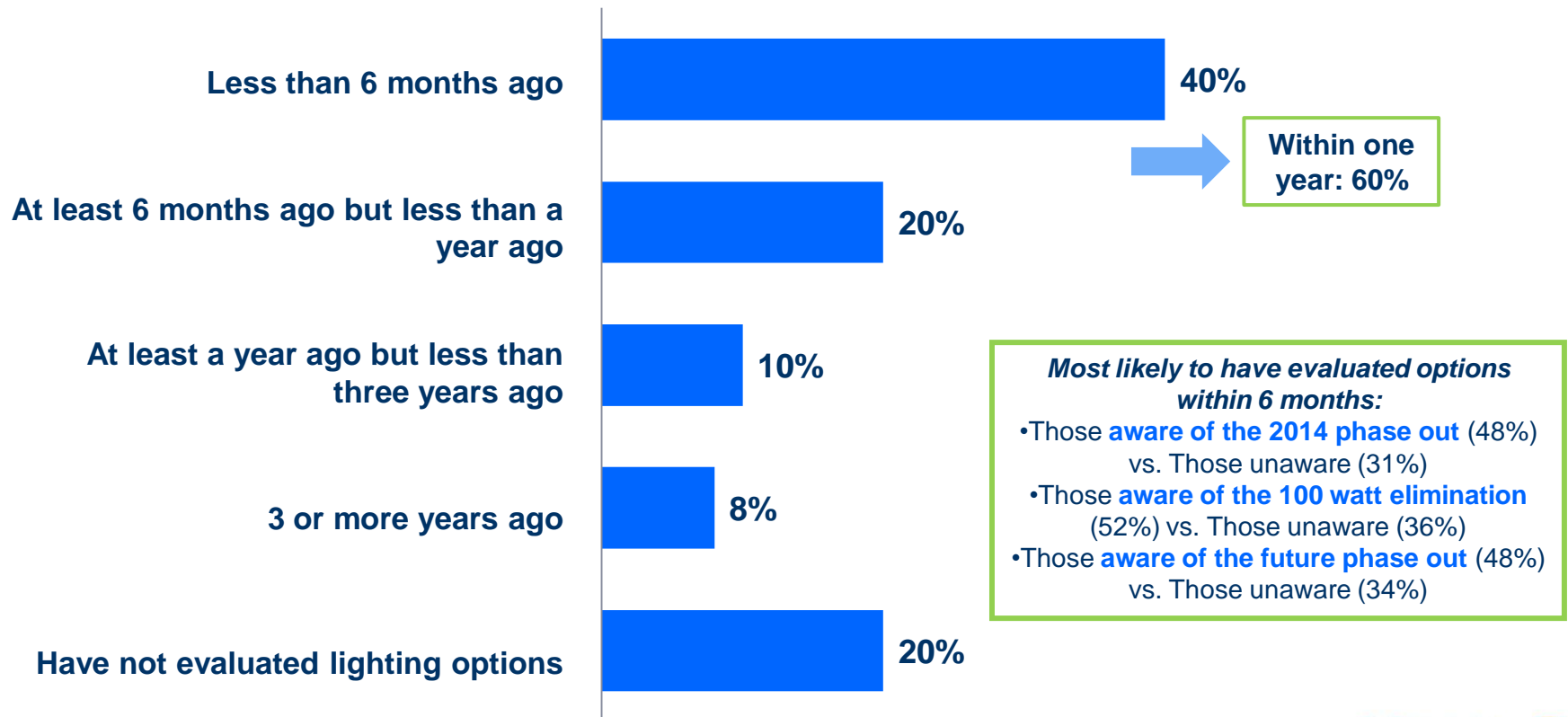


Base: 2008 N=301; 2009 N=302; 2010 N=309; 2011 N=303



The majority of consumers have evaluated lighting within the past year. Those aware of bulb legislation are most likely to have evaluated options within the past six months.

Q14. Sometimes people review and evaluate certain things in their homes, such as the lighting and light bulbs they use. Thinking about you personally, when was the last time you thought about and evaluated the types of lighting and light bulbs you use?.



Light Bulb Choices

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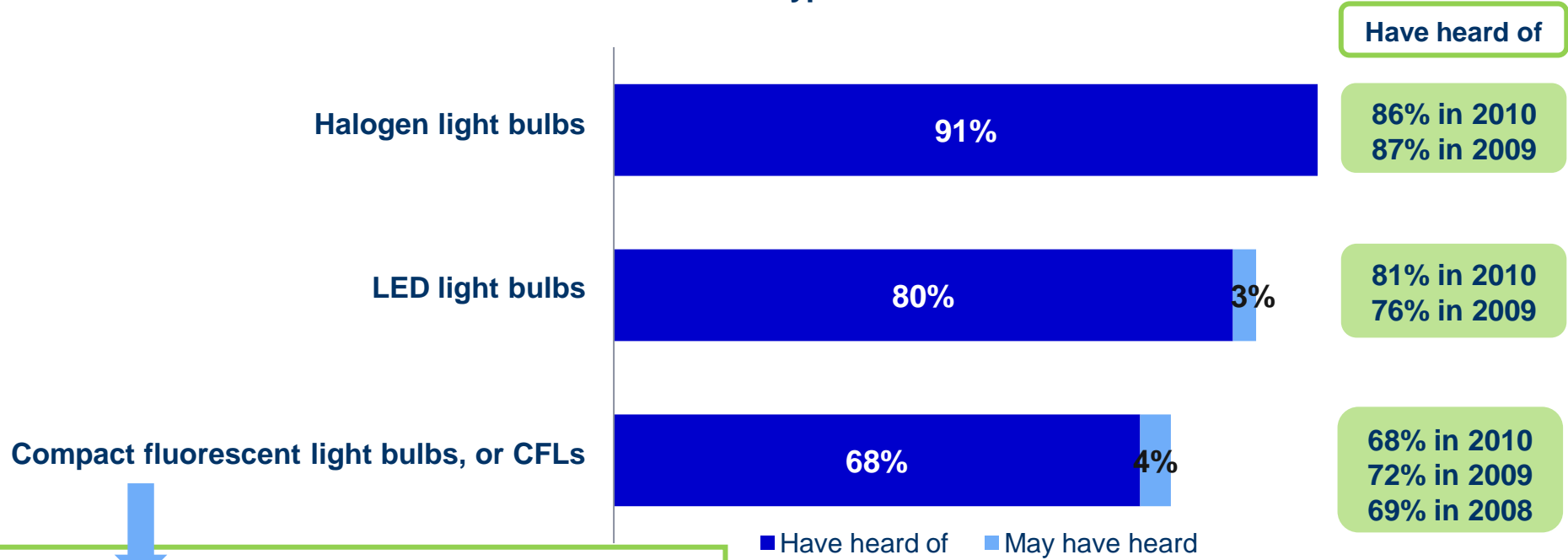
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Awareness of bulb options has remained stable over the past few years. Halogen remains the most widely recognized but nearly seven in ten are familiar with CFLs.

Q5. I am now going to read you a list of different types of light bulbs. For each one please tell me if you have definitely heard of this type of light bulb, might have heard of it or if you have not heard of this type of light bulb.

Heard of this type of bulb?



Compact fluorescent light bulbs, or CFLs

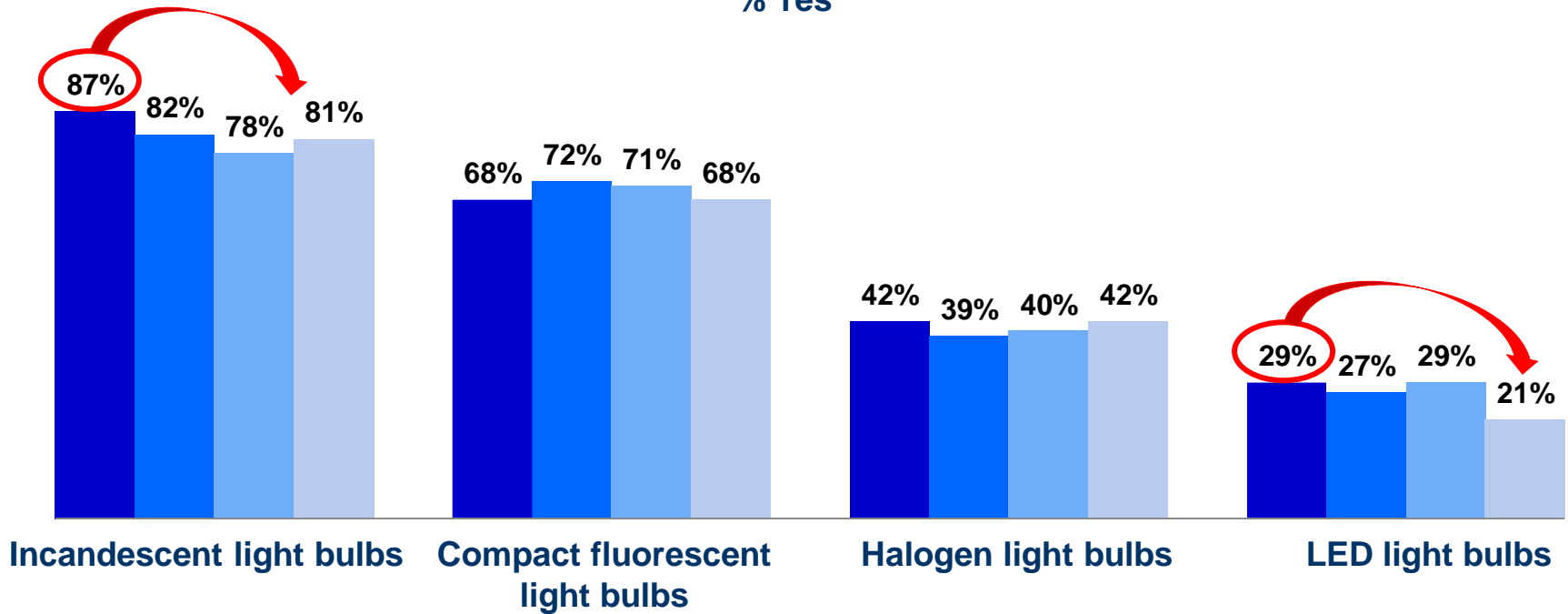
Most like to have heard of CFLs:

- **Males** (74%) vs. Females (63%)
- Those with a **college degree** (76%) vs. No degree (63%)
- Have **evaluated lighting within one year** (72%) vs. Have never evaluated lighting (44%)

More use incandescent bulbs than in the past, while CFL usage remains steady around seven in ten.

Q6. Next, I have some questions about the lighting you have in your home. I'm going to read you a list of different types of light bulbs that are available. For each one please tell me if you have this type of bulb in your home.

% Yes



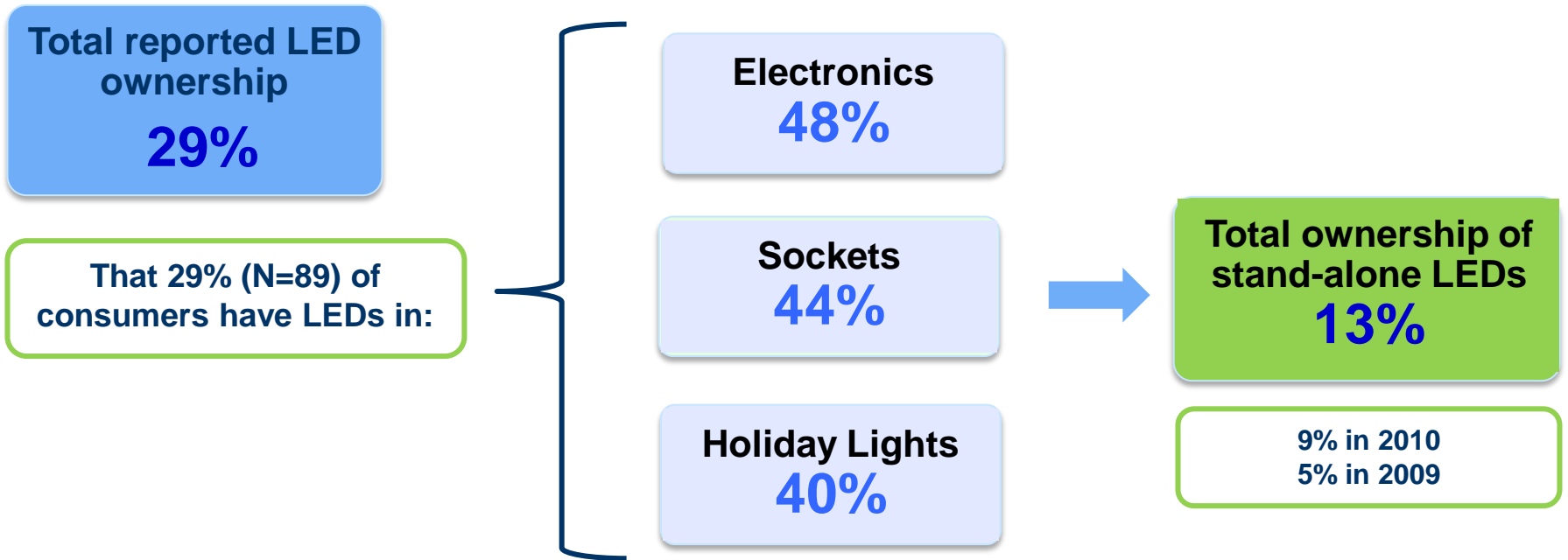
■ 2011 ■ 2010 ■ 2009 ■ 2008

Base: 2008 N=301; 2009 N=302; 2010 N=309; 2011 N=303

Total LED stand-alone usage is low, one in eight report having them at home, but there continues to be a directional increase over time.

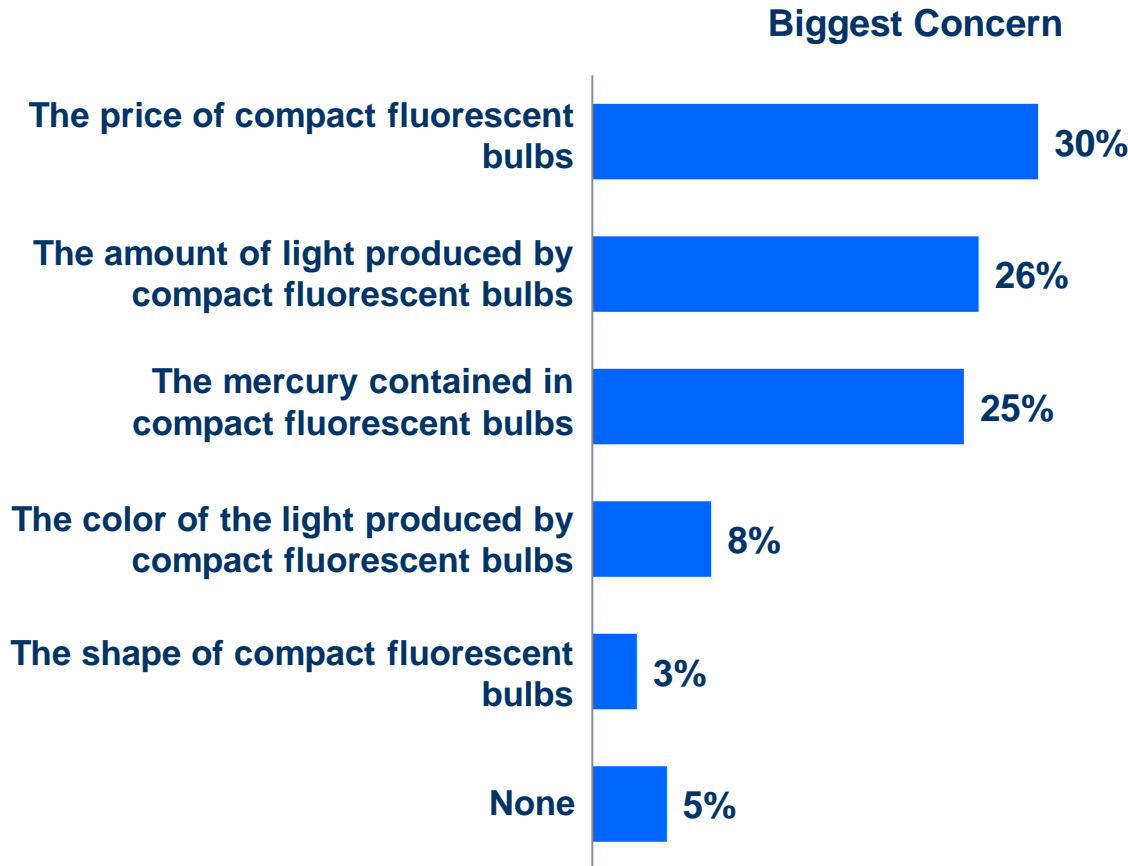
Q7. Are the LED light bulbs in your home being used like traditional light bulbs placed in sockets or are they part of electronics you have in your home, or both?

Multiple Responses Accepted



The biggest concerns with CFLs include price, amount of light, and mercury content – these are concerns to at least one-quarter of consumers.

Q8. Which one of the following would be your biggest concern about purchasing compact fluorescent light bulbs for your home?

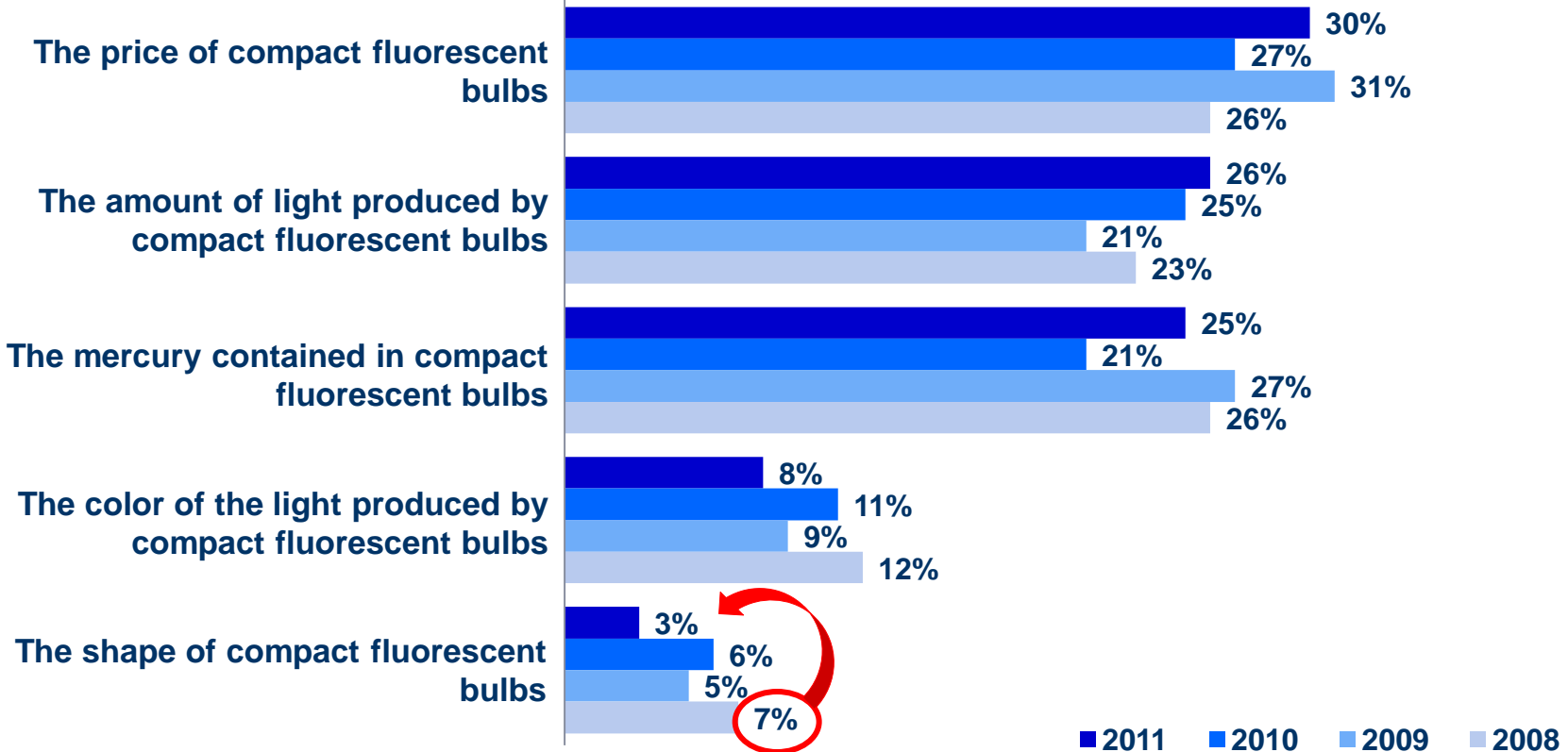


Who is most concerned about price?
• Younger consumers, age 18-54, (39%) vs. Older consumers age 55+ (19%)

Concerns about CFLs have remained steady over time. Price, light and mercury are continual concerns for 20% to 30% of consumers.

Q8. Which one of the following would be your biggest concern about purchasing compact fluorescent light bulbs for your home?

Biggest Concern



Base: 2008 N=301; 2009 N=302; 2010 N=309; 2011 N=303

Awareness of the Legislation and Future Steps

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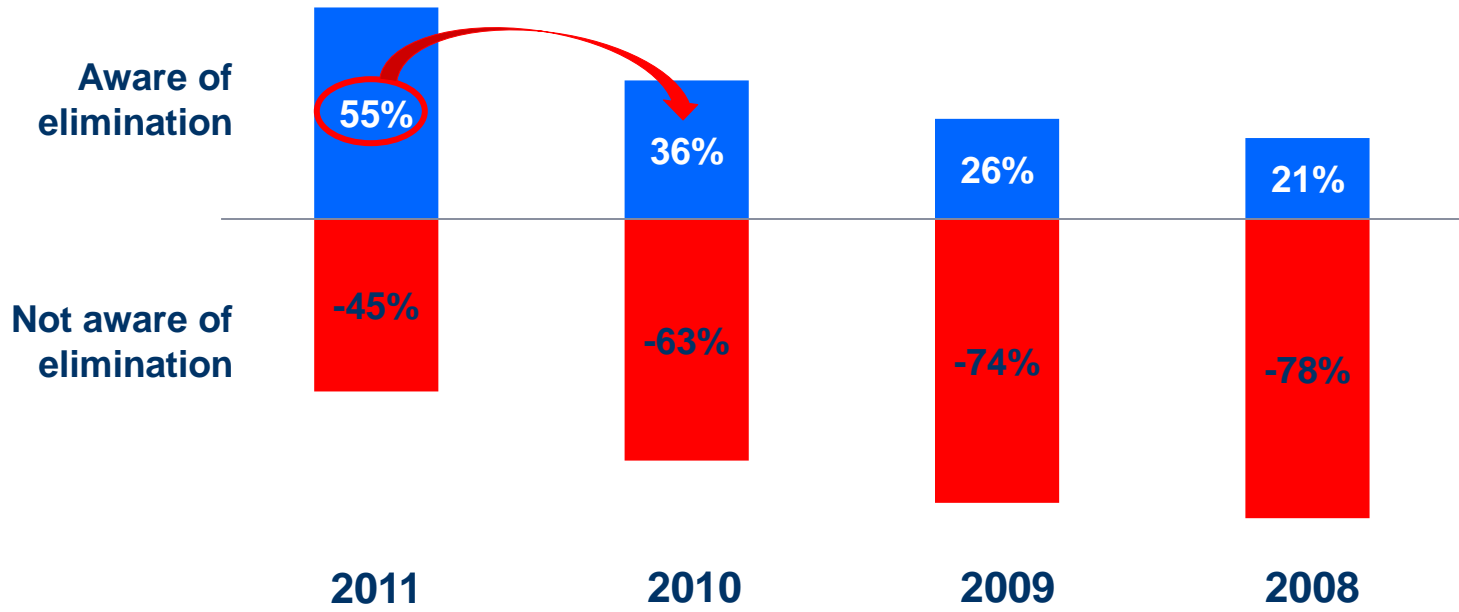


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Awareness of the phase out has increased steadily over time. In 2011 a majority of Americans reported awareness for the first time.

Q9. In 2007 Congress passed legislation that will eliminate most traditional incandescent light bulbs by 2014. Before today were you aware of this legislation?

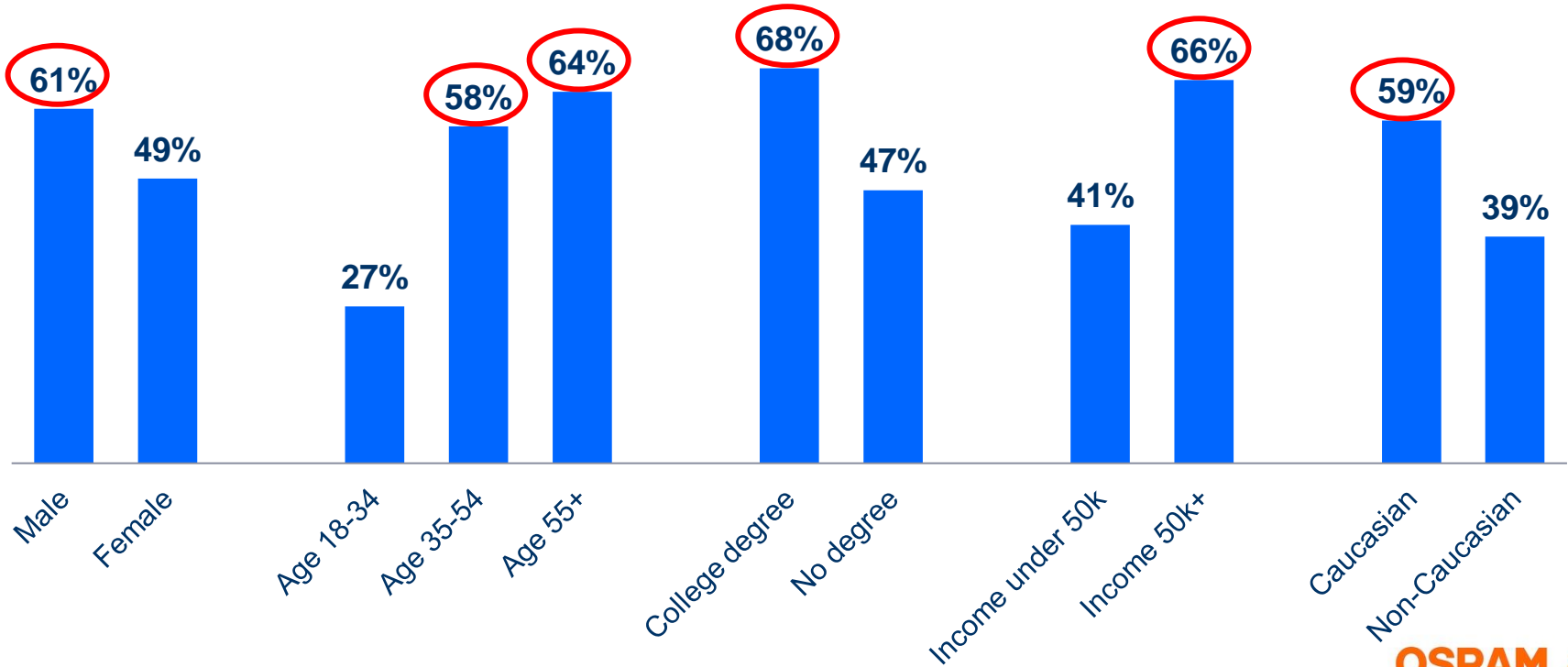


Base: 2008 N=301; 2009 N=302; 2010 N=309; 2011 N=303

Those least likely to be aware include: Women, Those aged 18-34, Consumers with no college degree and lower incomes, and Non-Caucasians.

Q9. In 2007 Congress passed legislation that will eliminate most traditional incandescent light bulbs by 2014. Before today were you aware of this legislation?

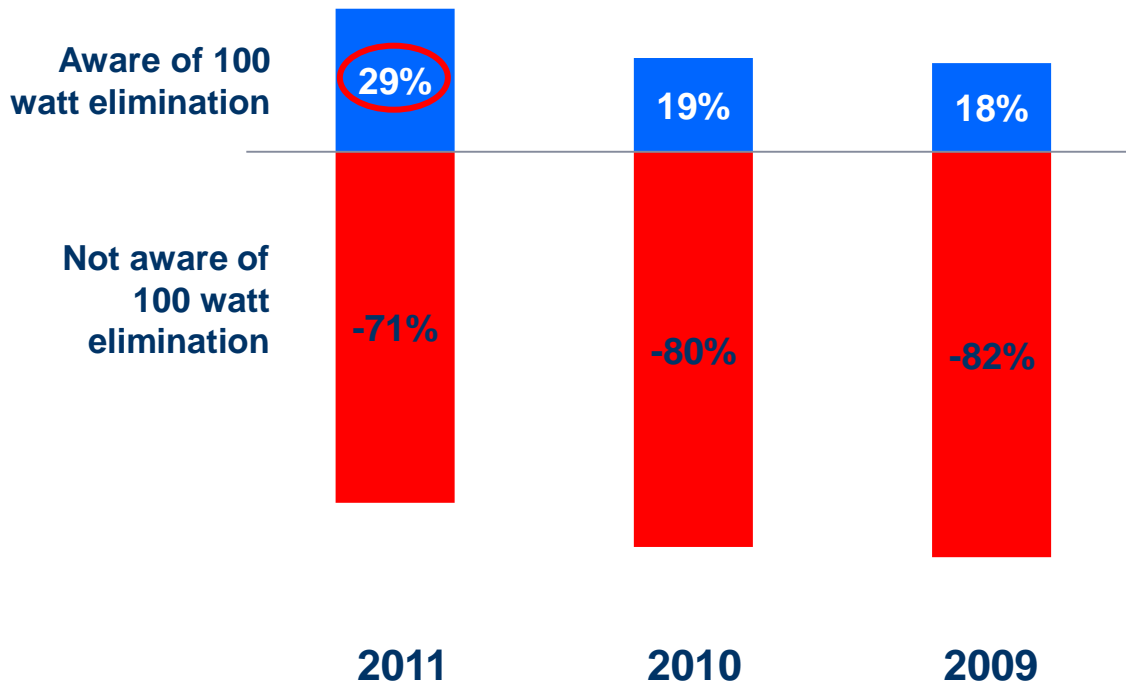
Aware of Legislation



Base: 2011 N=303

More are aware of the 100 watt elimination than in the past, but overall awareness of legislation specifics is low.

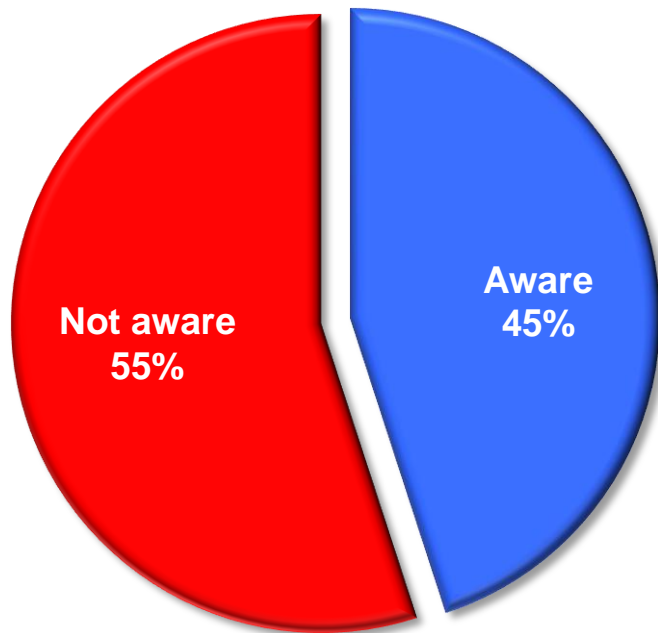
Q10. As part of the legislation, traditional 100 watt light bulbs will NO LONGER BE MADE after January 1, 2012. Before today, were you aware that 100 watt light bulbs will be eliminated by 2012?



- Who is aware of the eliminaton?**
- Those **involved in household bulb purchases** (31%) vs. Those not involved (16%)
 - **Older consumers**, age 35-54 (32%) and age 55+ (34%) vs. Younger consumers, age 18-34 (11%)
 - **College degree**-holders (39% vs. Those with no degree (23%)
 - Those who have **heard of CFLs** (35%) vs. Those who have not (14%)
 - Those who have **evaluated lighting within one year** (31%) vs. Those who have never evaluated options (18%)

Nearly half are aware that future legislation will continue to phase out traditional bulbs.

Q12. As part of FUTURE legislation, additional traditional watt light bulbs will be PHASED OUT over the next few years and NO LONGER BE MADE. Before today, were you aware of this PHASE OUT PROGRAM of traditional watt light bulbs?

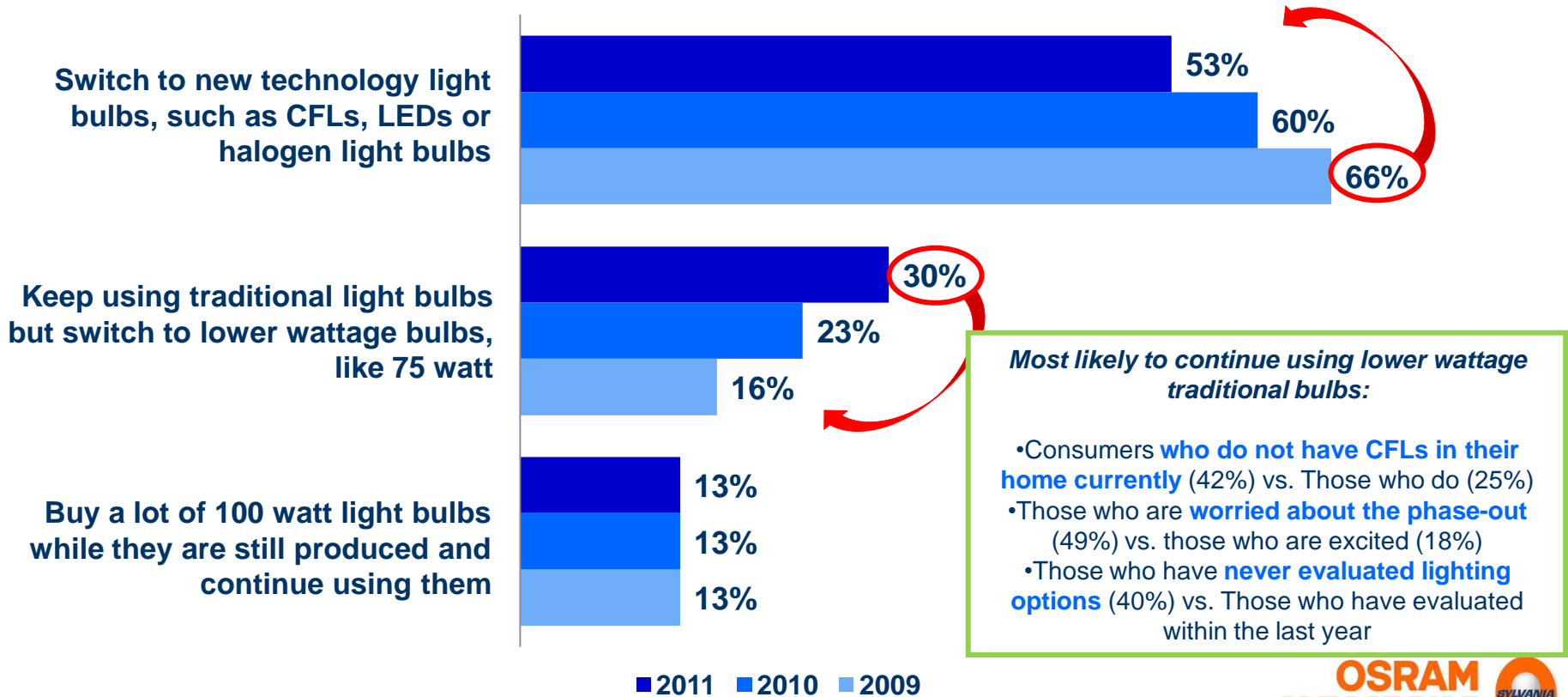


Most likely to be aware of the phase out:

- **Men** (51%) vs. Women (39%)
- Those **involved in household bulb purchases** (48%) vs. Those not involved (21%)
- Consumers who **have heard of CFLs** (53%) vs. Those who have not (22%)
- Those who **already have CFLs** in their home (51%) vs. Those who do not (29%)
- Those **aware of the 100 watt elimination** (89%) vs. Those unaware (27%)

Consumers continue to be most likely to switch to new technology bulbs once traditional bulbs are phased out, although more say they may switch to lower wattage incandescent bulbs.

Q11. When traditional 100 watt light bulbs are eliminated, which ONE of the following are you most likely to do?



■ 2011 ■ 2010 ■ 2009

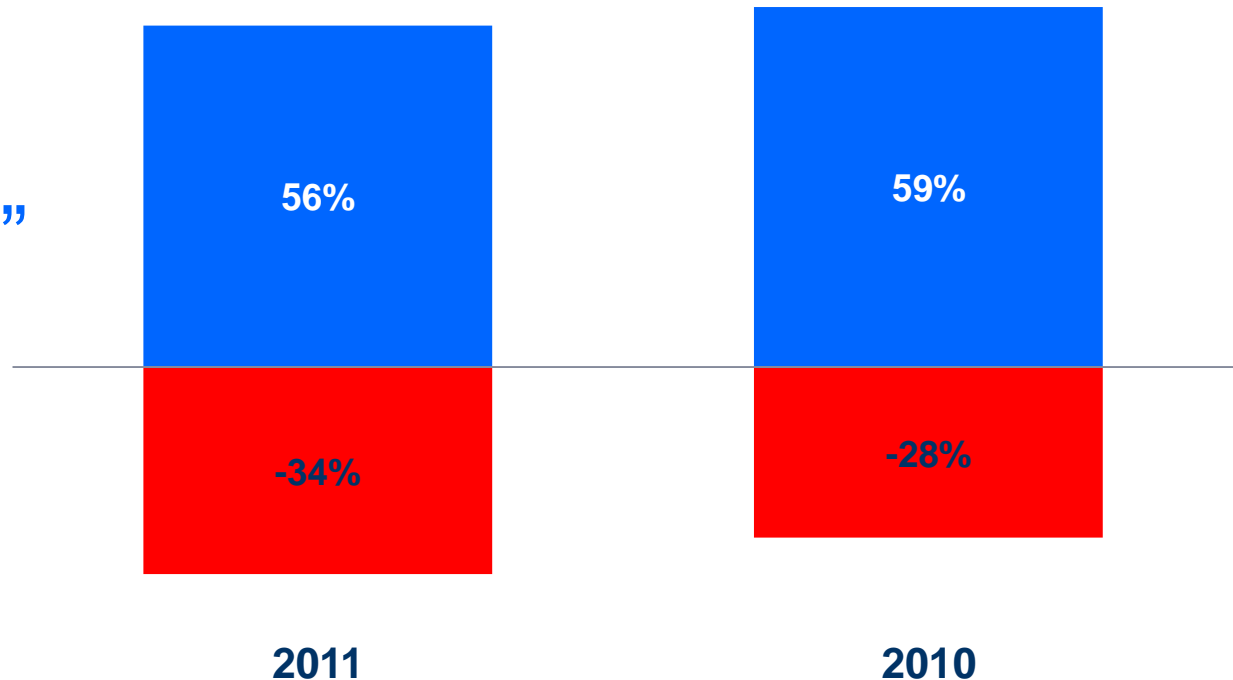
Base: 2009 N=302; 2010 N=309; 2011 N=303

The majority report excitement about the phase out, but a sizable minority – one-third – are worried.

Q13. As most traditional incandescent light bulbs are phased out, Americans may need to start using other types of light bulbs. I'm going to read you two statements. Please tell me which one comes closer to how you feel about the phase out of incandescent bulbs.

“ I'm **excited about the phase out** because Americans will use more energy efficient light bulbs ”

“ I'm **worried about the phase out** because I prefer using traditional light bulbs ”

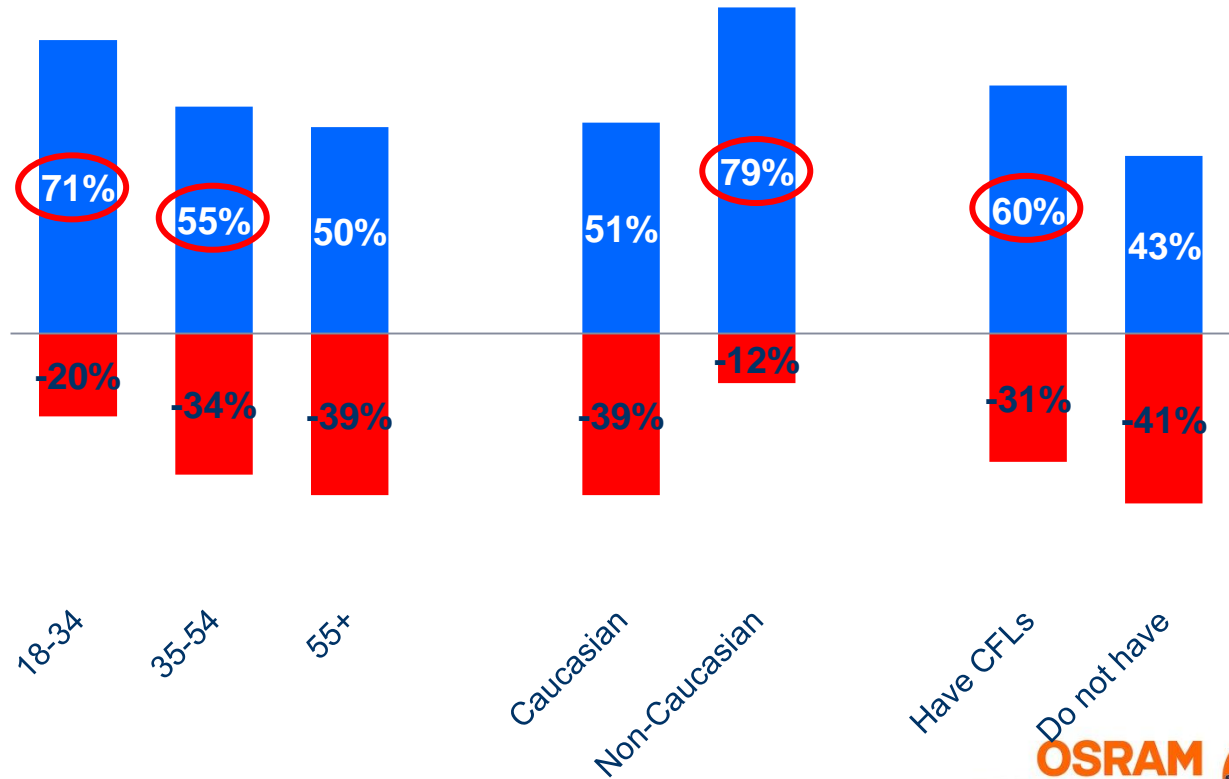


Younger consumers, Non-Caucasians, and those who already have CFLs at home are most excited about the phase out.

Q13. As most traditional incandescent light bulbs are phased out, Americans may need to start using other types of light bulbs. I'm going to read you two statements. Please tell me which one comes closer to how you feel about the phase out of incandescent bulbs.

“ I'm excited about the phase out because Americans will use more energy efficient light bulbs ”

“ I'm worried about the phase out because I prefer using traditional light bulbs ”



Demographics

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Respondent Attributes

Age	2011	2010	2009	2008	Income	2011	2010	2009	2008
18 to 24	10%	13%	12%	3%	Under \$20,000	12%	14%	8%	8%
25 to 34	9%	14%	19%	8%	\$20,000 to less than \$30,000	10%	11%	10%	9%
35 to 44	12%	15%	22%	14%	\$30,000 to less than \$40,000	10%	8%	11%	11%
45 to 54	27%	23%	17%	21%	\$40,000 to less than \$50,000	13%	11%	16%	7%
55 to 64	23%	18%	11%	23%	\$50,000 to less than \$75,000	14%	15%	16%	15%
65 to 74	11%	11%	14%	17%	\$75,000 to less than \$100,000	10%	15%	12%	12%
75+	9%	6%	6%	16%	\$100,000 to less than \$150,000	10%	7%	9%	10%
Education					\$150,000 or more	8%	4%	6%	7%
No schooling	-	-	-	-	Don't know/ Refused	13%	16%	12%	20%
8 th grade or less	1%	1%	1%	*	Location				
Some high school	4%	5%	5%	4%	Urban	27%	26%	28%	23%
Completed high school	28%	33%	22%	26%	Suburban	55%	56%	53%	54%
Vocational school/trade school	3%	7%	6%	4%	Rural	18%	19%	18%	23%
Some university/college	25%	18%	27%	22%	Ethnicity				
Completed university/college	25%	21%	26%	22%	White	78%	76%	72%	83%
Postgraduate degree	13%	15%	14%	20%	Black or African American	11%	9%	12%	7%
Don't know/ Refused	1%	1%	-	2%	Hispanic	5%	8%	9%	3%
Region					American Indian or Alaskan Native	1%	*	1%	1%
Northeast	n/a	18%	19%	20%	Asian	1%	2%	2%	1%
Midwest	n/a	28%	23%	24%	Native Hawaiian or other Pacific Islander	*	n/a	*	n/a
South	n/a	33%	36%	31%	Other	1%	1%	*	2%
West	n/a	21%	23%	25%	Don't know/ Refused	4%	3%	4%	3%
Last Evaluated Lighting					Gender				
Less than six months ago	40%	34%	-	-	Male	48%	48%	48%	48%
At least six months ago but less than one year	20%	17%	-	-	Female	52%	52%	52%	52%
At least one year but less than three years ago	10%	13%	-	-					
Three or more years	8%	9%	-	-					
Have not evaluated	20%	25%	-	-					

Base: 2008 N=301; 2009 N=302; 2010 N=309301; 2009 N=302; 2010 N=309; 2011 N=303