

OSRAM SYLVANIA Socket Survey 7.0

Research results

Conducted by KRC Research| March 2015



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Background and Methodology

The OSRAM SYLVANIA Socket Survey has been conducted annually since 2008. This document contains results from the 7th round of research. A new methodology and updated questions were used in 2015 to better capture new, post phase-out landscape.

	2015	2013	2012	2011	2010	2009	2008	
METHOD:	Online survey	Landline and cell phone telephone survey				Landline telephone survey		
DATA COLLECTION:	February 19-24, 2015	November 15-24, 2013	November 8-15, 2012	October 13-17, 2011	November 20-December 1, 2010	November 6-10, 2009	November 14-17, 2008	
SAMPLE SIZE:	1,000 interviews total	300 interviews total (65 via cell phone)	305 interviews total (65 via cell phone)	303 interviews total (76 via cell phone)	309 interviews total (77 via cell phone)	302 interviews total	301 interviews total	
SAMPLE: (American adults, ages 18+)	Obtained through an online panel	Obtained through random digit dialing						
MARGIN OF ERROR: (At 95% Confidence)	±3.1% for the entire sample	±5.7% for the entire sample	±5.6% for the entire sample	±5.6% for the entire sample	±5.6% for the entire sample	±5.7% for the entire sample	±5.7% for the entire sample	

*Please note: The 2015 survey was fielded with a different methodology than in previous years. While comparisons to past data are made in this report, the findings should be considered directional.

Research Objectives

OSRAM SYLVANIA commissioned this survey to uncover insights on the topic of LED light bulbs – specifically consumer adoption, and behaviors and attitudes towards LED technology. This research was designed to:

1. Explore the prevalence of LED light bulbs in homes;
2. Understand the home lighting purchase behaviors of consumers, including pain points, influencers, and future purchases; and
3. Gauge consumer awareness and interest levels of new "smart lighting" and other technologies.

Please note: The 2015 survey was fielded with a different methodology than in previous years. While comparisons to past data are made in this report, the findings should be considered directional.

Key Findings

Snapshot of Key Findings

Purchasing Insights

- Almost all consumers are involved in light bulb purchase decision making in their households.
- Most commonly, information on which bulbs to buy comes at the point-of-purchase: in-store displays or employees and product packaging. Consumers are least likely to rely on either reviews from consumers or experts.

Bulb Evolution Insights

- Brightness and longevity remain the most important factors when consumers are evaluating light bulb options.
- LED light bulb users are more likely to place importance on energy usage and ambiance, including the Energy Star logo, amount of energy used, dimming capabilities, and color produced when choosing a light bulb.

Bulb Usage

- Following the phase-out of incandescent bulbs, Americans are most likely to have switched to CFLs in their home following the phase out of incandescent bulbs, followed by LEDs.

LED Bulbs

- A majority of consumers reporting having purchased LED light bulbs for their homes.
- The most important factors to consumers when considering buying LED bulbs include longevity, amount of light, and price.

Snapshot of Key Findings

CFLs

- CFLs are the main competitor to LED light bulbs as the successor to the incandescent light bulb. The competition for future bulb purchases is between CFLs and LEDs – Americans are equally as likely to say they'll purchase either the next time they need a replacement.
- Following incandescent light bulbs, Americans are most likely to have purchased CFLs for their home – particularly in the last 12 months.

“Smart” Technologies

- Awareness of “smart” technologies is high – specifically for home alarms, thermostats, lighting, and door locks.
- While most have heard of various “smart” technologies, very few have actually purchased them for their homes.
- Consumers are most likely to consider purchasing “smart” home technologies, like door locks, thermostats, alarm systems, and lighting, over “smart” home appliances.

“Smart Lighting”

- Most consumers feel "smart lighting" will eventually replace regular light bulbs. Yet, usage is not widespread.
- "Smart lighting" is seen as a good introduction to home automation.
- Consumers who already own "smart lighting" solutions are more likely to consider replacing old technologies with “smart” versions – including thermostats, house alarms, door locks, small appliances, and large appliances.
- Price of "smart lighting" is a concern among consumers – a majority feel it is too expensive for them, and price is the #1 influence on purchases.

Key Themes:

LED Landscape is Changing

1. **LED awareness and use is changing.** While in past surveys LEDs fell behind other types of bulbs, the 2015 survey reveals that now more are aware of LED light bulbs and purchasing them for their homes.
 - **LED light bulbs are the most recognized type of light bulb.** 89% of Americans have “definitely” heard of them, compared to the 83% who have “definitely” heard of halogen light bulbs, and 72% who have “definitely” heard of CFLs. In past years, Halogen light bulbs – and sometimes CFLs – have had more consumer awareness.
 - **Despite nearly all Americans being aware of LED light bulbs (99% have heard of them), more consumers are buying other types of bulbs.** For example, 92% of Americans have purchased incandescent light bulbs for their homes, and 81% have purchased CFLs, while just 65% have purchased LED light bulbs. While this is likely for a variety of reasons, the initial cost of an LED light bulb could be turning consumers off, as price remains a top purchase consideration for bulbs. Interestingly, females are more likely to have purchased LED light bulbs – 70%, versus 60% of males.
 - **LED users place a higher importance on energy saving features and ambiance when choosing a light bulb.** Compared to those who do not use LED light bulbs in their homes, LED users are more likely to place importance on the amount of energy the bulb uses (93% vs. 86% non-LED), the color of light the bulb produces (87% vs. 81% non-LED), if the bulb carries the Energy Star logo (81% vs. 73% non-LED), and dimming abilities (62% vs. 38% non-LED).
 - **For the first time in 5 years, LED light bulbs are being used more as a standalone than in other products.** 64% of LED users report that the bulbs are being used in sockets, up from 33-44% the past four years. Only 35% report that their LED lights are being used in holiday lights, and 32% report that they’re being used in electronics.

LED Themes:

LED's Main Competition are CFLs

2. CFLs are the top competitor to LED light bulbs, both in current and future purchases.

- **More Americans have purchased CFLs than other types of bulbs in the past year** – 53% of Americans report having purchased CFLs for their homes in the past 12 months, compared to just 41% who have purchased LED light bulbs in the past year.
- **Future purchases intentions also indicate that CFLs will be a top choice.** When they next need to purchase light bulbs for their home, CFLs are the number one choice (37%), followed closely by LED light bulbs (35%). Among non-LED users, CFLs are also the top choice of replacement bulbs (45%), with only 18% indicating they would purchase LED light bulbs as a replacement. However, among LED users, 44% would most likely purchase LED light bulbs again. This indicates a loyalty to LEDs once Americans are a user, but hesitation at initially switching. One possible explanation for this hesitation to switch to LED bulbs could be price – nearly 1 in 3 (30%) non-LED users do *not* think the initial cost of LED bulbs are worth it.
- Following the phase-out of incandescent light bulbs, 78% of Americans chose to switch light bulbs rather than stock up on traditional bulbs to keep using. However, despite high-levels of LED awareness, the most common bulb switched to are CFLs (41%) followed by LEDs (30%).

LED Themes:

“Smart Lighting” is the Gateway to Home Automation

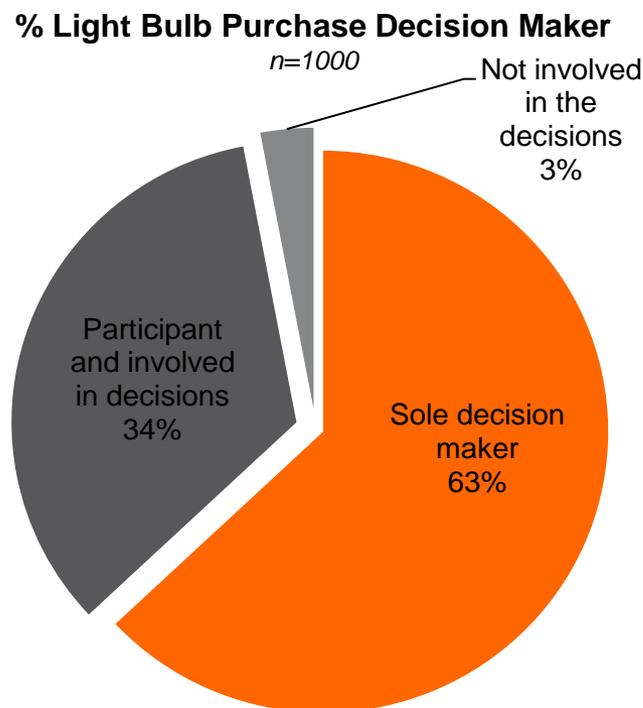
3. "Smart lighting" is the gateway “smart” technology to home automation.

- **Those looking to “smarten” up their homes should start with their lights** – 83% of Americans think "smart lighting" is a good introduction to home automation technologies. Even more, 72% of Americans think "smart lighting" will eventually replace regular light bulbs.
- This is further supported by the fact that **those who currently own "smart lighting" are more likely to indicate they will purchase “smart” versions of home technologies when they next need to replace them** – including thermostats (84% vs. 58% non-"smart lighting" owners), house alarms (80% vs. 51% non-"smart lighting" owners), and door locks (80% vs. 45% non-"smart lighting" owners).
- While “smart” technologies aren’t a new concept, **usage is not widespread just yet.** 87% of Americans have heard of some type of “smart” technology, but only 26% currently own any “smart” technologies. After thermostats (13%) and house alarm systems (11%), lighting is the most common type of “smart” home automation owned.

Detailed Findings

Light Bulb Purchase Decision Power

Nearly all (97%) consumers are involved in making light bulb purchase decisions for their home. **Those with "smart lighting" or other "smart" technologies have the most decision power** – they are the most likely to be the sole decision makers in their household.



Most Likely to be the Sole Decision Maker:

Men (72%), vs. (54%) of women.

"Smart lighting" owners (75%), vs. those who do not own "smart lighting" (61%).



Q. When it comes to decisions about light bulb purchases within your household, which of the following best describes you? (n=1000)

Light Bulb Purchase Considerations

Price is not the most important consideration when choosing a light bulb – brightness and longevity are the most important considerations. **LED light bulb users place a higher importance on energy use and ambiance** than those who do not use LED light bulbs.

Very Important for LED vs. Non-LED users:

Amount of time lasts:
67% LED, 59% non-LED

Amount of energy used:
62% LED, 49% non-LED

Color of light produced:
46% LED, 41% non-LED

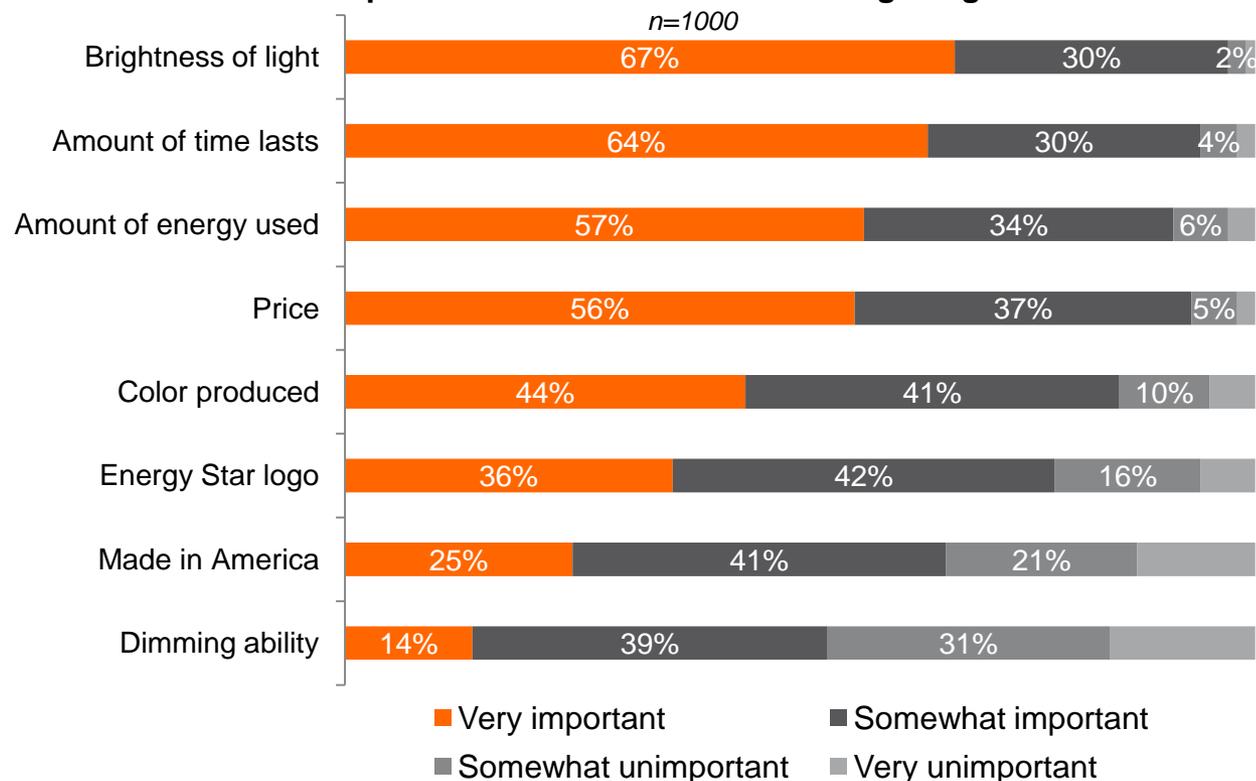
Energy Star logo:
40% LED, 29% non-LED

Made in America:
27% LED, 19% non-LED

Dimming ability:
17% LED, 8% non-LED



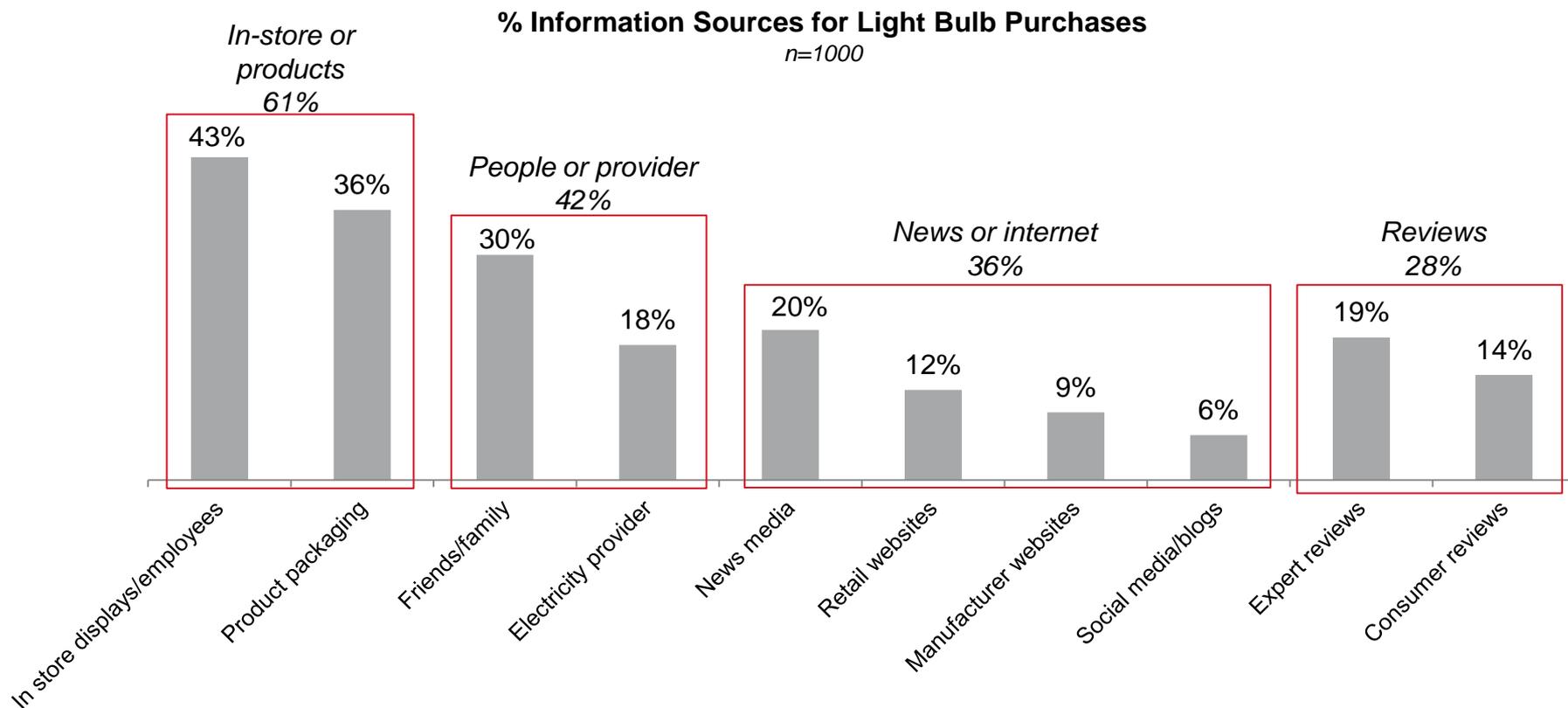
% Importance of Attributes in Choosing a Light Bulb



Q. How important are each of the following attributes to you when you choose a light bulb? (n=1000)

Light Bulb Information Sources

Americans are most commonly getting their information about which light bulbs to buy at the point of purchase – 61% get light bulb information from in store displays or product packaging. The next most common information sources are people – 42% consult friends and family or their electricity provider.

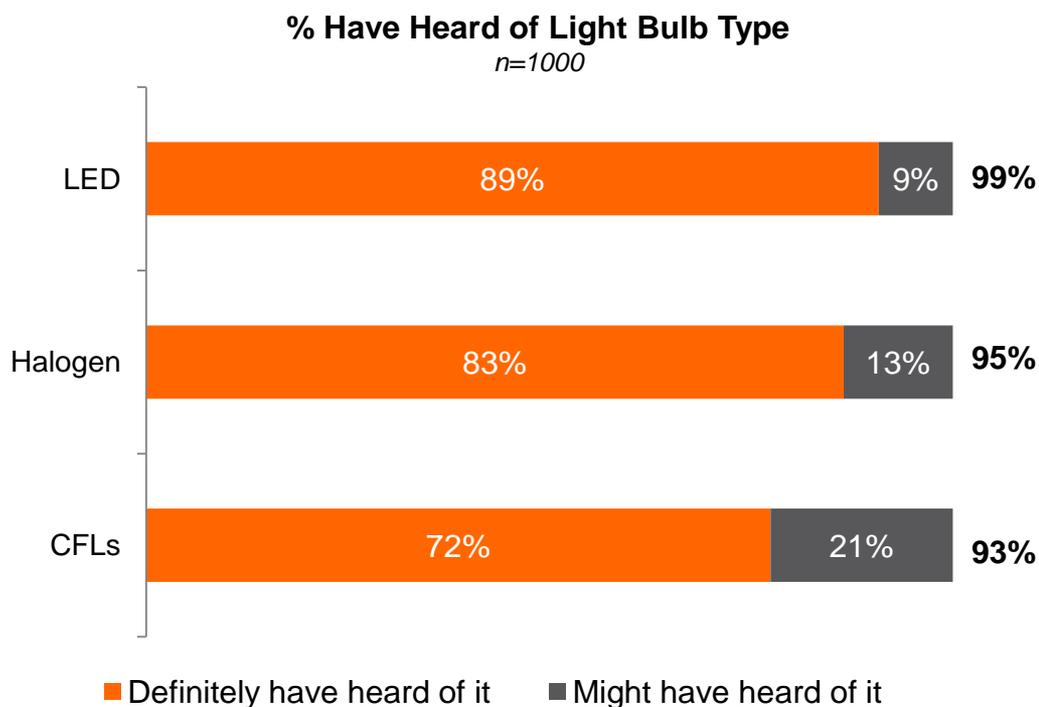


Q. Where do you get your information about what light bulbs to purchase? (n=1000)



LED Light Bulb Awareness

Directionally, **awareness of LED light bulbs has continued to rise**, surpassing the awareness of Halogen light bulbs for the first time. Nearly all Americans (99%) have heard of LED light bulbs.



“Definitely” + “Might Have” Heard of Past Year Comparisons:

LED

77% in 2013
69% in 2012
83% in 2011
84% in 2010

Halogen

88% in 2013
89% in 2012
91% in 2011
90% in 2010

CFLs

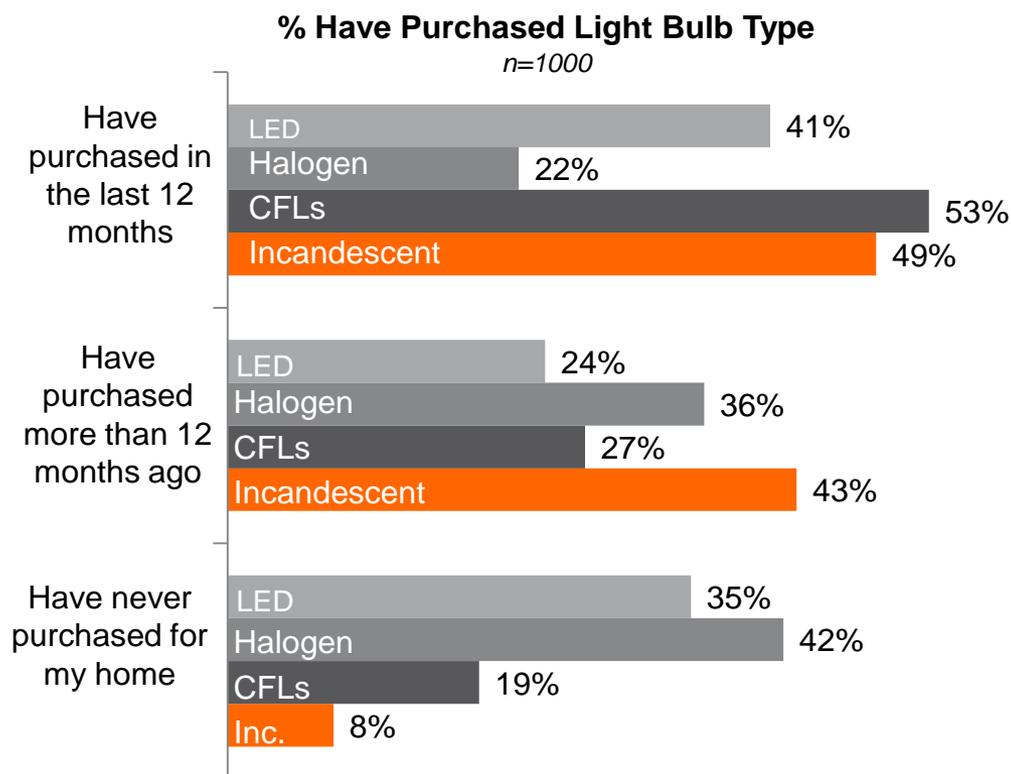
70% in 2013
70% in 2012
72% in 2011
75% in 2010



Q. Which of the following types of light bulbs have you heard of? (n=1000)

LED Light Bulb Purchases

Following the passing of legislation that phased out incandescent light bulbs, LED light bulbs are becoming more common. **65% of Americans have ever purchased an LED light bulb for their home**, 41% of those within the last 12 months.



Most likely to have purchased LED light bulbs:

Women (70%) vs. men (60%).

Younger Americans ages 18-34 (69%) vs. older Americans ages 55+ (59%).

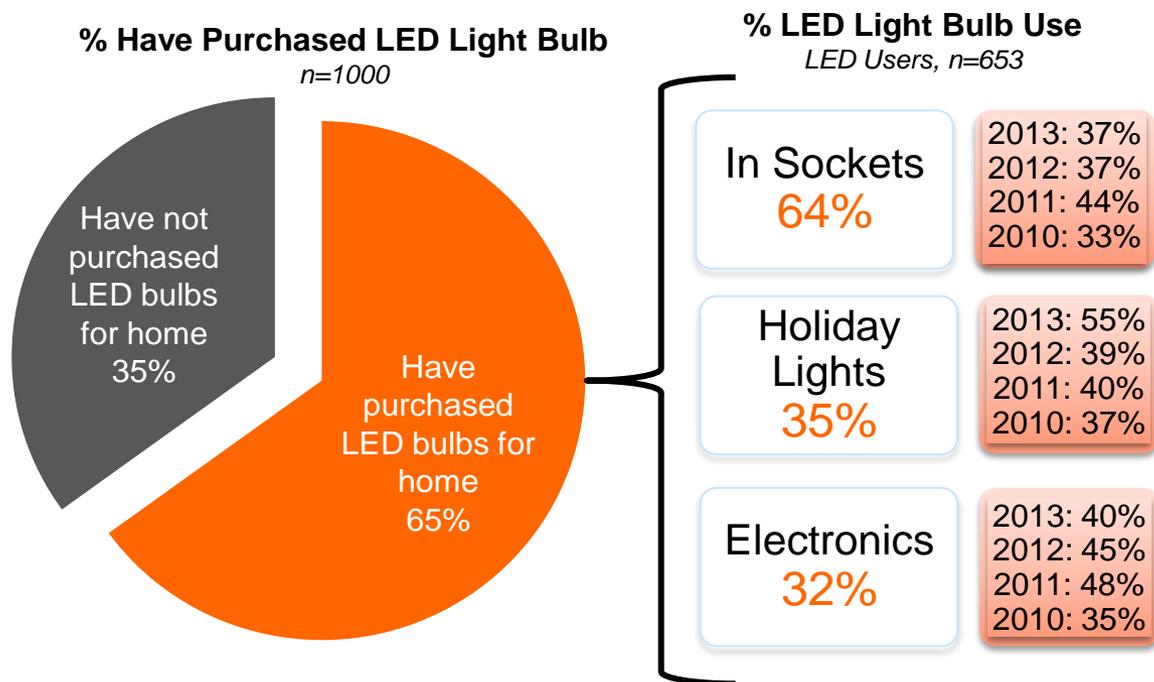
“Smart” technology owners (80%) vs. non-“smart” technology owners (60%).



Q. Which of the following types of light bulbs, if any, have you purchased for your home? (n=1000)

Standalone LED Ownership Tops Holiday Lights

This year, a majority of LED users report bulbs are used like traditional light bulbs – in sockets (64%). This is even more than report using LED bulbs in holiday lights (35%) or electronics (32%), and is the first time that standalone LEDs are more common than those included in other technologies.



Q. Which of the following types of light bulbs, if any, have you purchased for your home? (n=1000)

Q. Are the LED light bulbs in your home being used like traditional light bulbs placed in sockets, are they part of electronics you have in your home, or are they in holiday lights? (n=653)

Future LED Light Bulb Purchases

While LED adoption in the home has grown, it's competing primarily with CFLs for future home purchasers. Those who already use LED light bulbs in their home are more likely to buy LED bulbs the next time they need a replacement compared to non-LED users (17%). This indicates loyalty among LED users, but hesitations among non-LED users to switch bulb types.

Most likely to purchase LED bulbs next:

Men (39%) vs. women (31%).

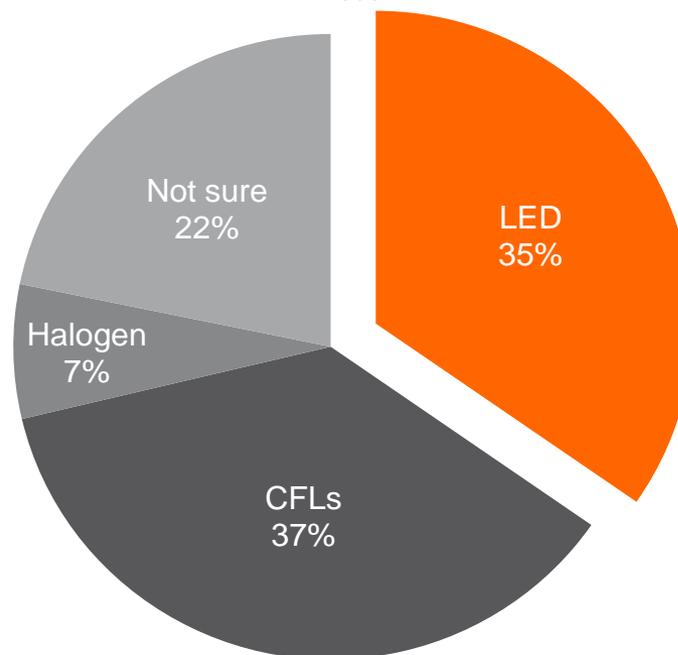
LED users (44%) vs. non-LED users (18%).

"Smart" technology owners (43%) vs. non-"smart" technology owners (32%).



% Purchase Light Bulb Type for Next Replacement

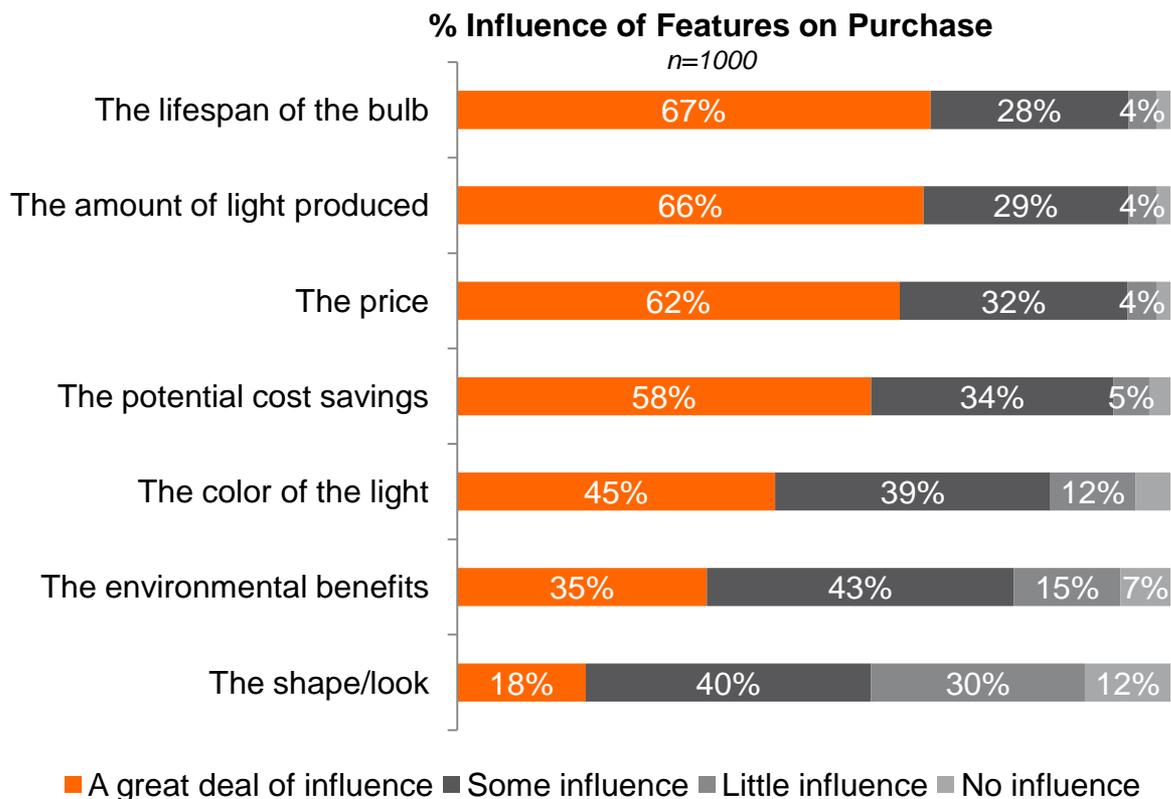
n=1000



Q. The next time you need to purchase light bulbs for your home, which type of light bulb are you most likely to buy? (n=1000)

LED Light Bulb Purchase Drivers

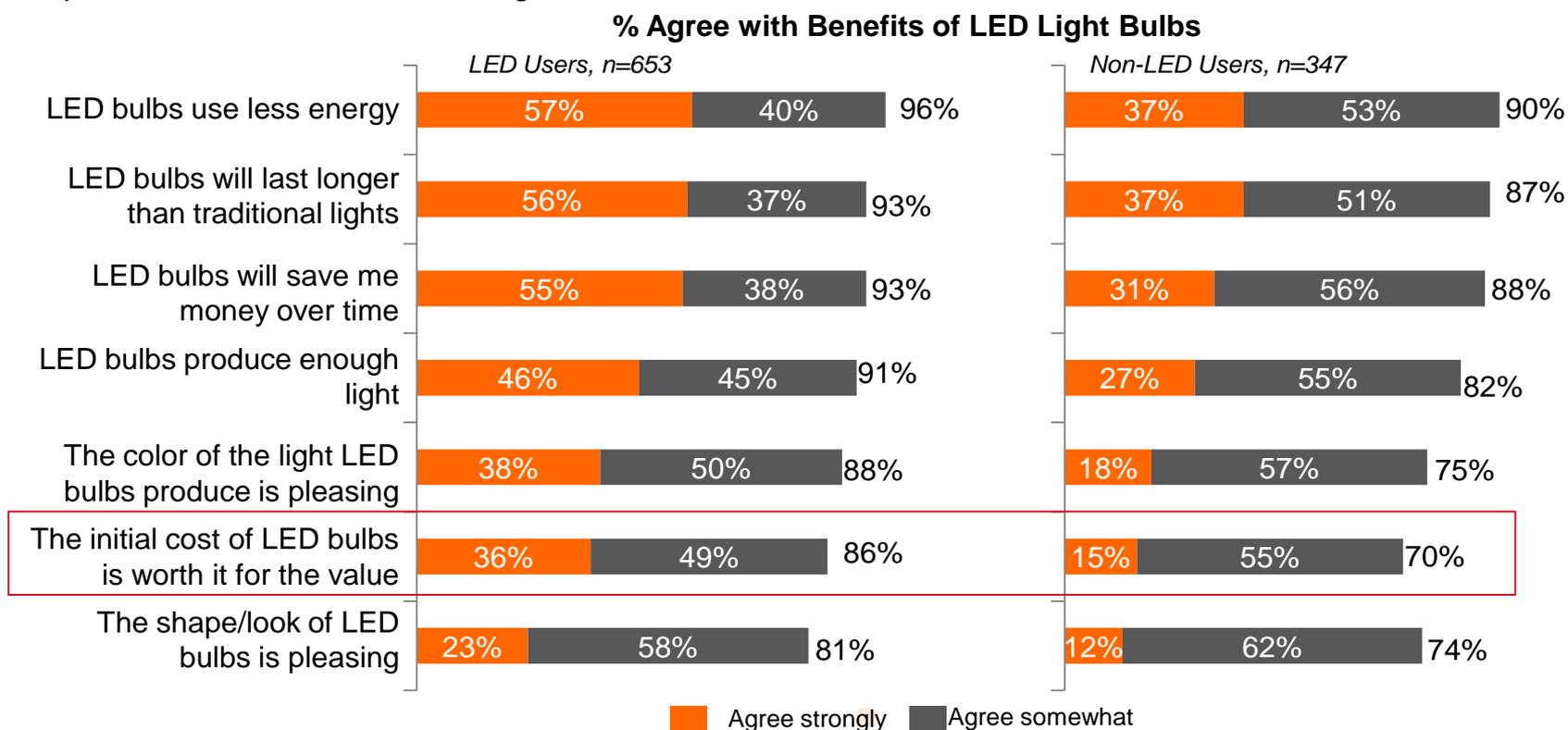
LED light bulb purchase drivers are practical. Rather than focus on things like the shape or color of light, Americans are most influenced by the lifespan of the bulb (94%), the amount of light produced (94%), and the price (94%).



Q. When thinking about LED light bulbs, how much would the following features influence your decision to buy one? (n=1000)

Benefits of LED Light Bulbs

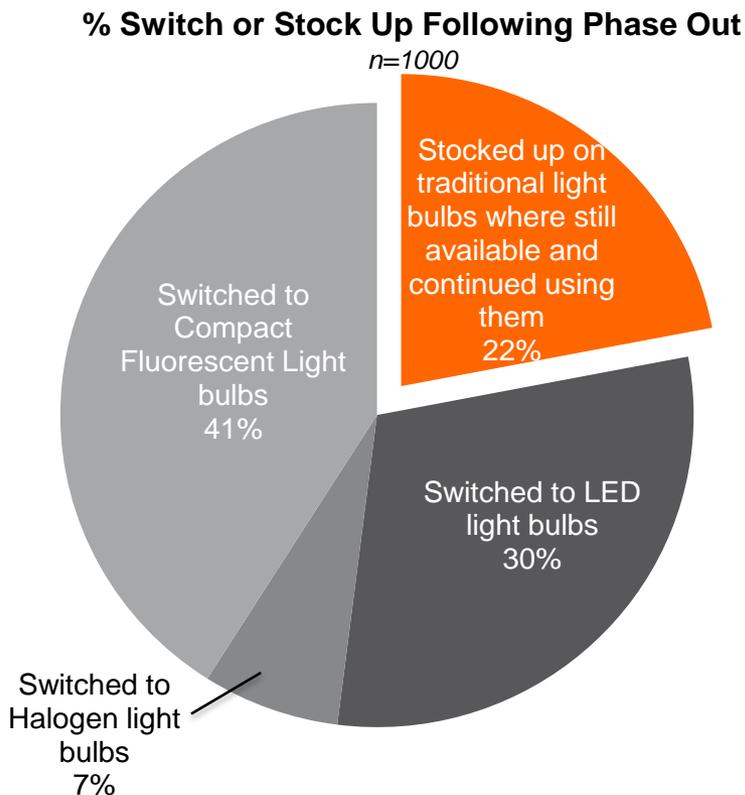
Most all Americans have positive opinions of LED light bulbs, but users report slightly higher agreement with statements about the benefits of LEDs. While agreement is still high among non-LED users, the most doubt comes from the initial cost. This makes sense as price is a top influence on purchase decisions for LED light bulbs.



Q. To what extent do you agree with the following statements? (n=1000)

Incandescent Bulbs – Stocking Up vs. Switching

Following the phase out of incandescent light bulbs, 78% of Americans most often switched bulbs, rather than stocking up on traditional bulbs to continue using (22%). CFLs were the most common bulb to switch to, but LED light bulbs were the next most common switch.



Most likely to switch to LED bulbs:

Young Americans ages 18-34 (38%), vs. older Americans ages 55+ (22%).

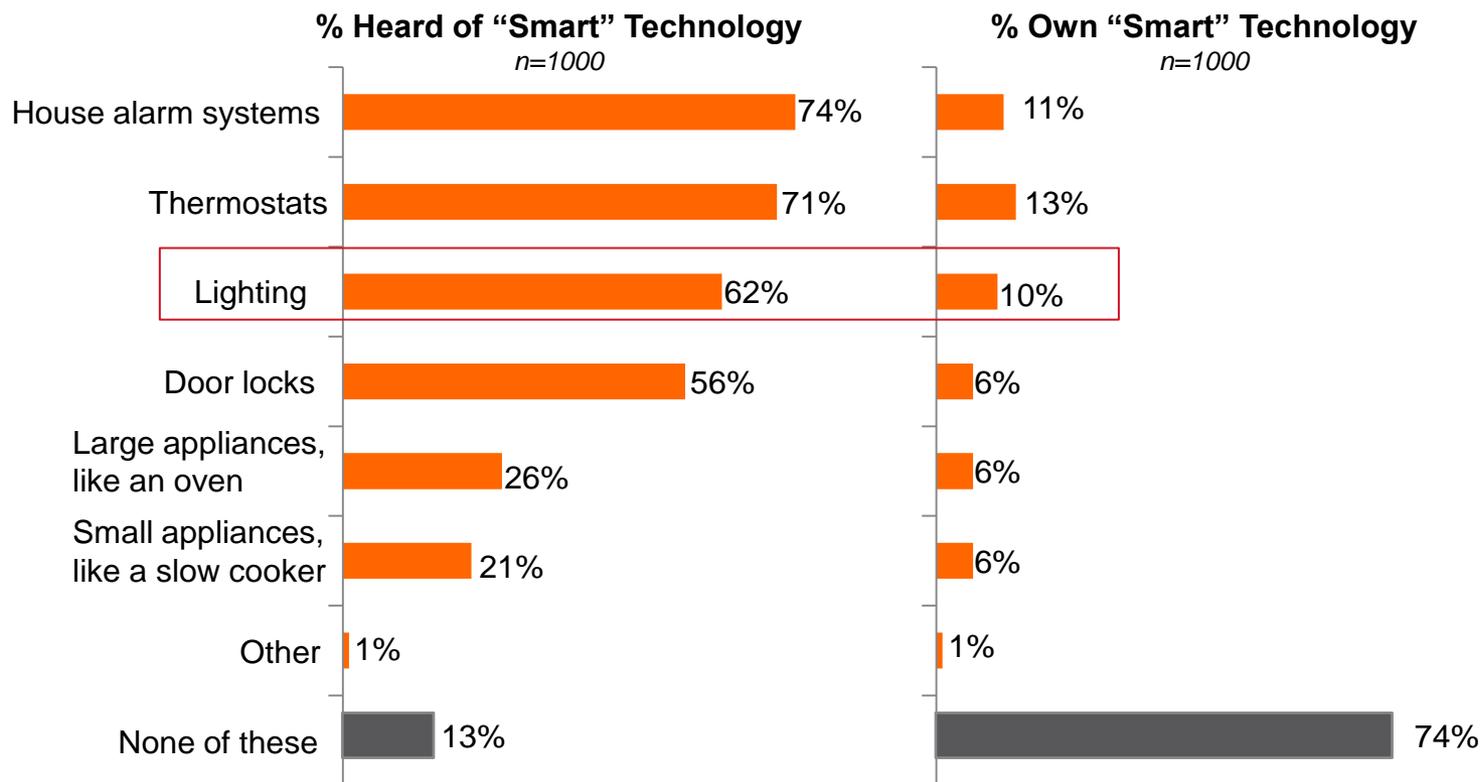
“Smart” technology owners (41%) vs. non-“smart” technology owners (26%).



Q. Now that traditional incandescent light bulbs have been phased out, which did you do in your household most often? (n=1000)

“Smart” Technologies in Homes

72% of Americans feel that "smart lighting" will eventually replace traditional light bulbs, but adoption has to grow a lot before this is possible. While 62% have heard of "smart lighting", only 10% have actually purchased it for their own use.



Q. Which of the following “smart” home technologies, if any, have you heard of? (n=1000)

Q. Which of the following “smart” home technologies, if any, do you currently own? (n=1000)

Q. How strongly do you agree or disagree with the following statements? (n=1000)

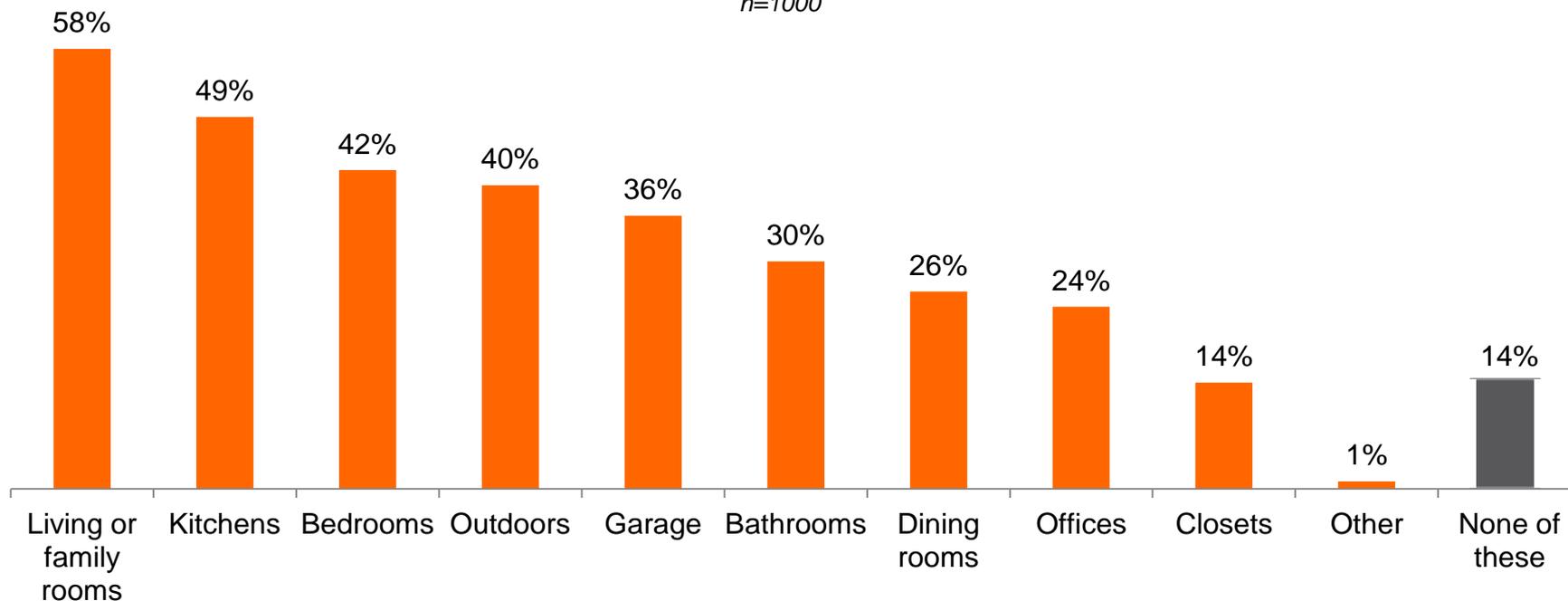


“Smart Lighting” Home Hotspots

61% of Americans think "smart lighting" fits their lifestyle (Q20) – but even more think it fits their home. 86% of Americans think at least one room in their home would benefit from "smart lighting" solutions (Q20). Living and family rooms (58%), kitchens (49%), and bedrooms (42%) top the list, but not all home hotspots are inside. The next most common responses are outdoors (40%) and in the garage (36%).

% Rooms Would Benefit from “Smart Lighting”

n=1000



Q. Which of the following rooms, if any, do you think would benefit from utilizing “smart” lighting solutions? (n=1000)

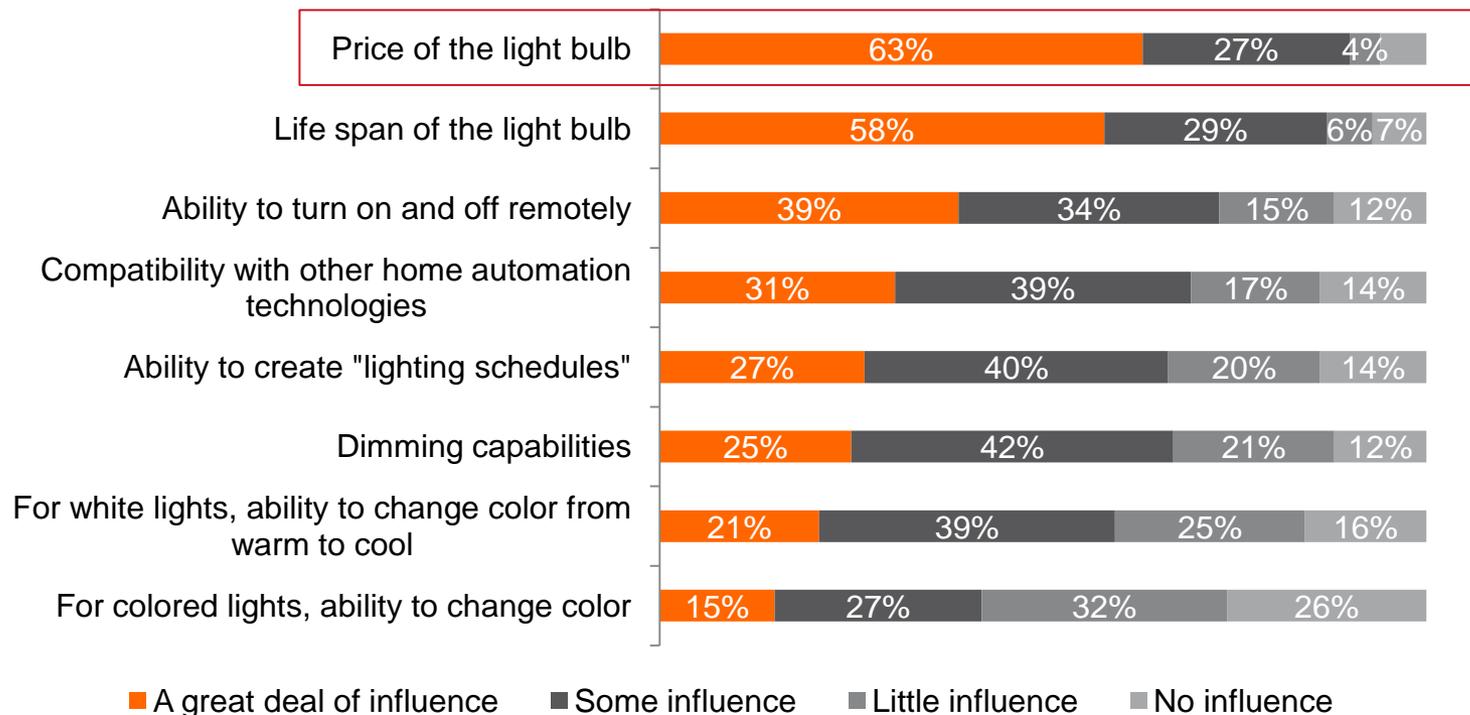
Q. How strongly do you agree or disagree with the following statements? (n=1000)

Purchase Influencers for “Smart Lighting”

While price was not the top consideration for regular light bulb purchases, it is the top influencer for "smart lighting". This could be due, in part, to the fact that 77% of Americans think "smart lighting" solutions are too expensive for them (Q20).

% Influence of Features on “Smart” Light Bulb Purchase

n=1000



Q. When thinking about “smart” light bulbs, how much influence would the following features have in your decision to buy one? (n=1000)

Q. How strongly do you agree or disagree with the following statements? (n=1000)

Future “Smart” Technology Purchases

While future adoption does not appear to be widespread just yet, one subgroup does seem to have future plans to expand their “smart” homes – Americans who already own "smart lighting". This makes sense, as 83% of Americans think "smart lighting" is a good introduction to home automation (Q20).

“Smart lighting” owners most likely to next purchase other “smart” technologies:

Thermostat: 84%, vs. 58% non-owners

House alarms: 80%, vs. 51% non-owners

Door locks: 80%, vs. 45% non-owners

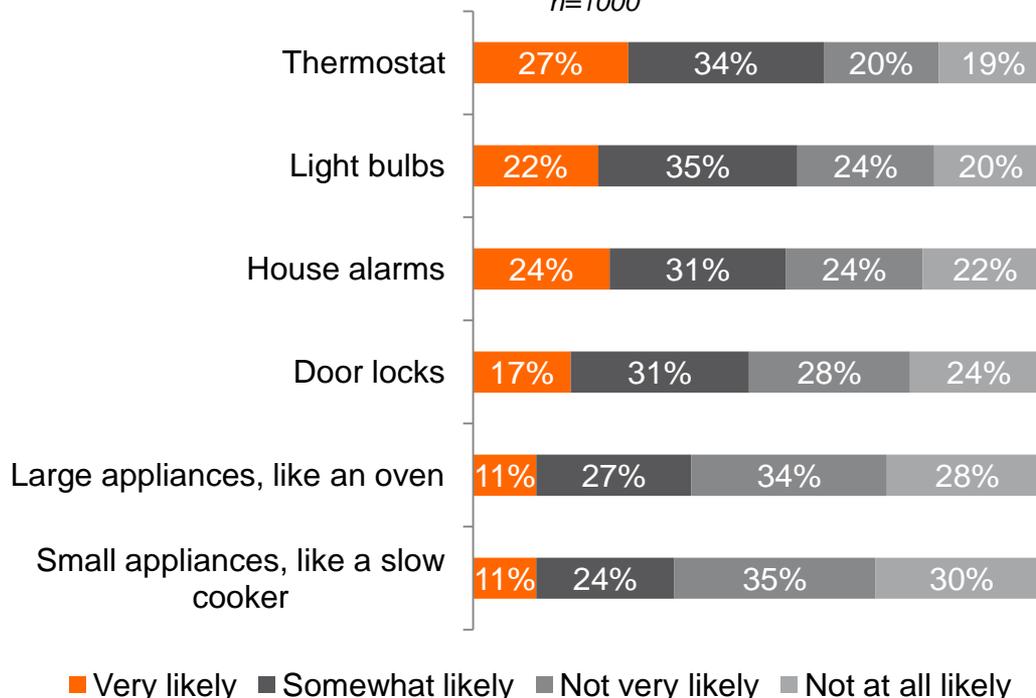
Large appliances: 75%, vs. 32% non-owners

Small appliances: 75%, vs. 31% non-owners



% Purchase “Smart” Technology in the Future

n=1000



Q. When you next need to replace them, how likely or unlikely are you to buy “smart” versions of each of the following technologies? (n=1000)

Q. How strongly do you agree or disagree with the following statements? (n=1000)



Appendix: Audience Profile

Audience Profile

		N=1000
Gender	Male	49%
	Female	51%
Age	18-34	28%
	35-54	37%
	55+	35%
Region	Northeast	17%
	Midwest	23%
	South	37%
	West	23%
Education	College degree	49%
	No college degree	51%

		N=1000
Hispanic	Yes	14%
	No	86%
Ethnicity	Caucasian	68%
	Black	12%
	Asian	4%
	Hispanic	14%
	Native American or Alaska native	1%
Income	Other	2%
	Less than \$50,000	42%
	\$50,000 to less than \$100,000	31%
	\$100,000 or more	23%