

2nd Annual SYLVANIA SOCKET SURVEY 12.19.2009

Conducted by KRC Research
for OSRAM SYLVANIA



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Executive Summary

- Energy efficiency is on consumers' minds
 - Nearly everyone (91%) considers energy consumption to be an important factor when purchasing a light bulb
 - Almost three-quarters (74%) say they have switched a light bulb for more energy efficiency in 2009, compared to 62% in 2008
- Despite mercury concerns and price considerations, CFLs continue to lead the “new technology bulbs” category and are just slightly behind traditional bulbs in usage
 - Over seven in ten (71%) are CFL owners compared to close to eight in ten (78%) incandescent and only four in ten halogen bulb owners (40%)
 - More consumers also say they are very likely to purchase CFLs than other technologies
- Energy efficiency, longevity and value for the money are the top benefits to using CFLs
 - For a third (32%) of consumers energy efficiency is the biggest benefit to using CFLs with long life (27%) and value for the money (24%) following closely
- Awareness of the legislation that would phase-out incandescent light bulbs remains low (26%), with no significant increase from 2008
 - Awareness of the 2012 100-watt bulb phase-out is even lower (18%)
- New technology light bulbs, and particularly CFLs, are the most likely substitute for traditional 100 watt bulbs once they are phased-out

Methodology

	2009	2008
METHOD:	Telephone survey	
DATA COLLECTION:	November 6-10, 2009	November 14-17, 2008
SAMPLE SIZE:	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%.	
	±5.7% for the entire sample	±5.7% for the entire sample

 throughout this report indicates statistically significant differences at the 95% confidence level

The Lighting Landscape

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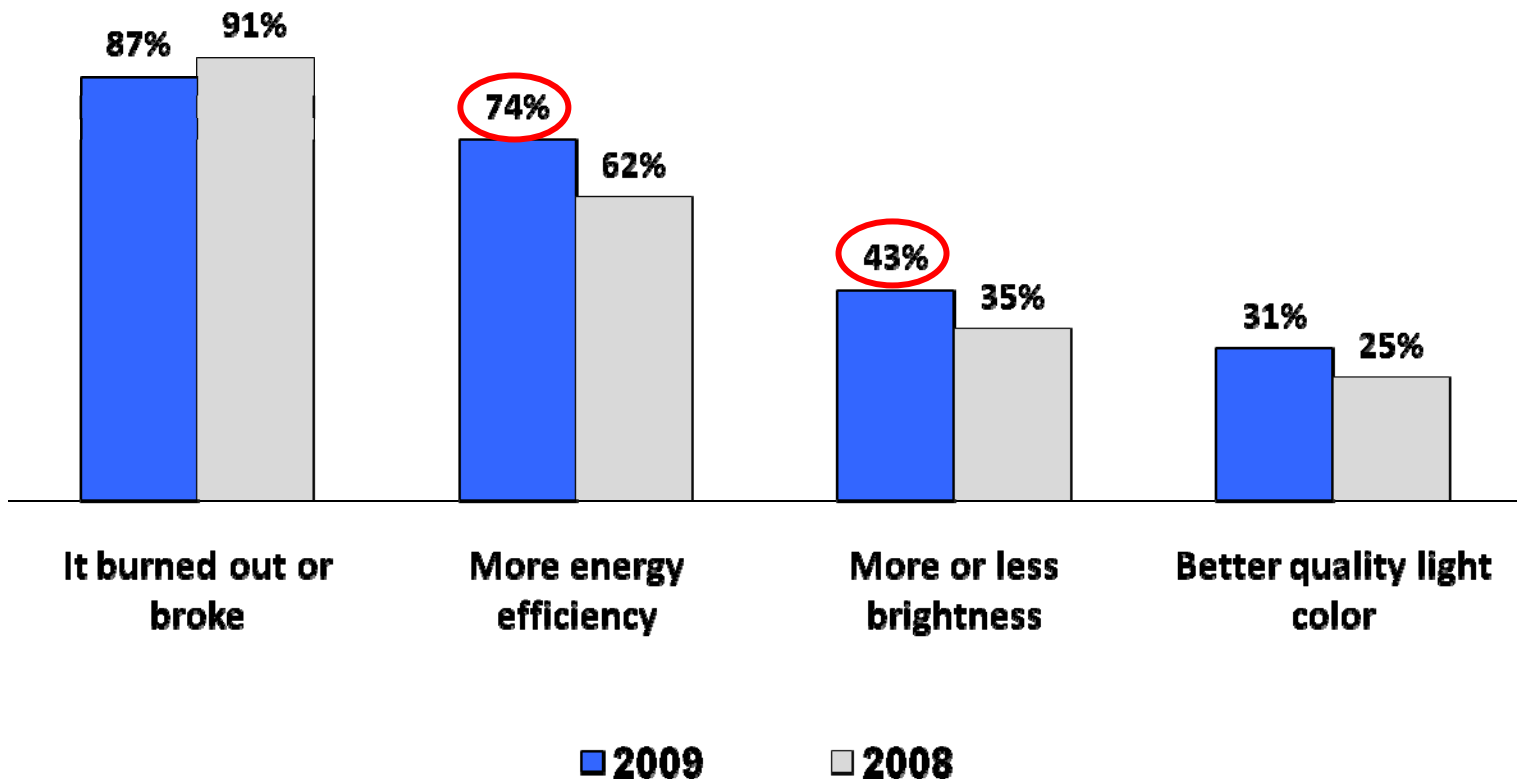


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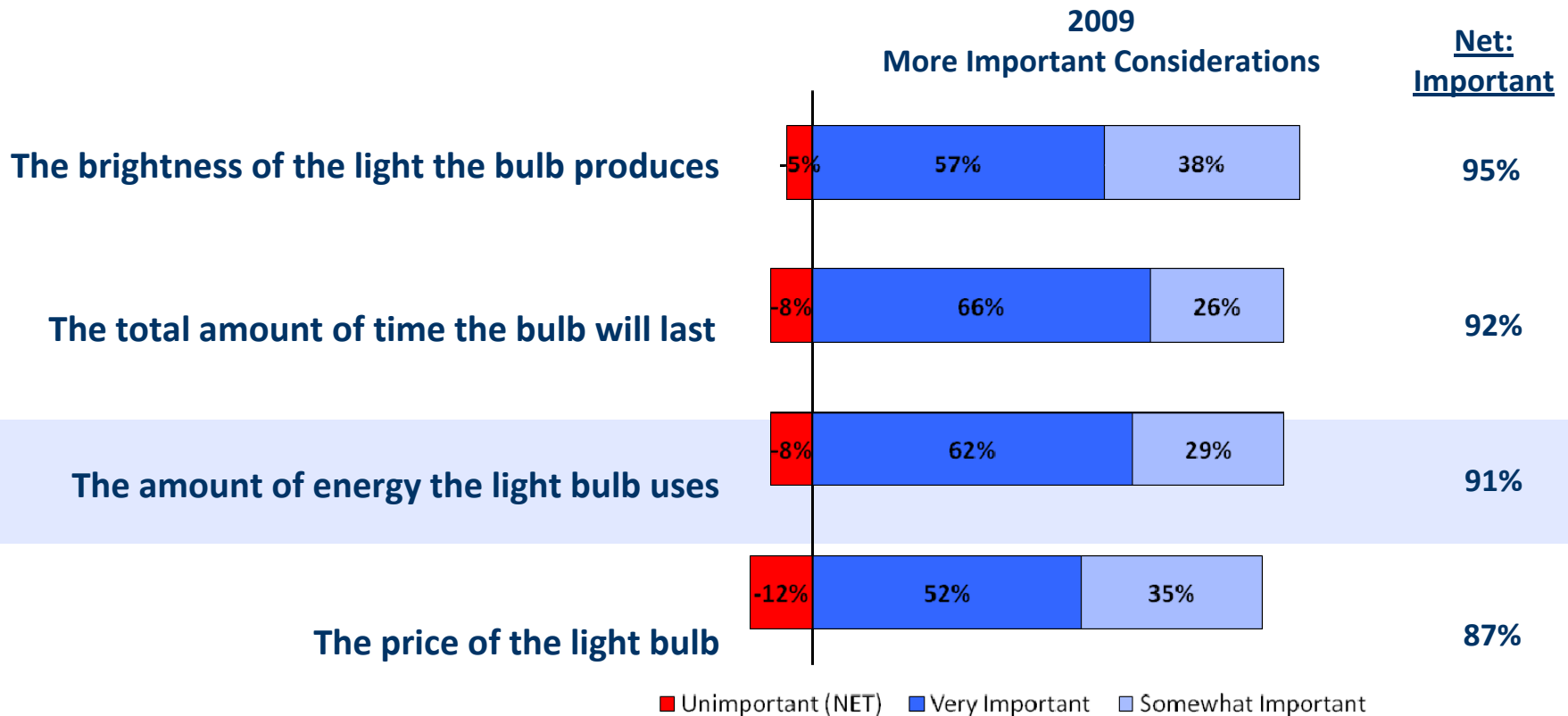
Energy efficiency is becoming even more important to consumers – 3 in 4 switched bulbs to increase energy efficiency in 2009, significantly more than last year

Q2. Please tell me if you have changed or switched out a light bulb for any of the following reasons within the last year:



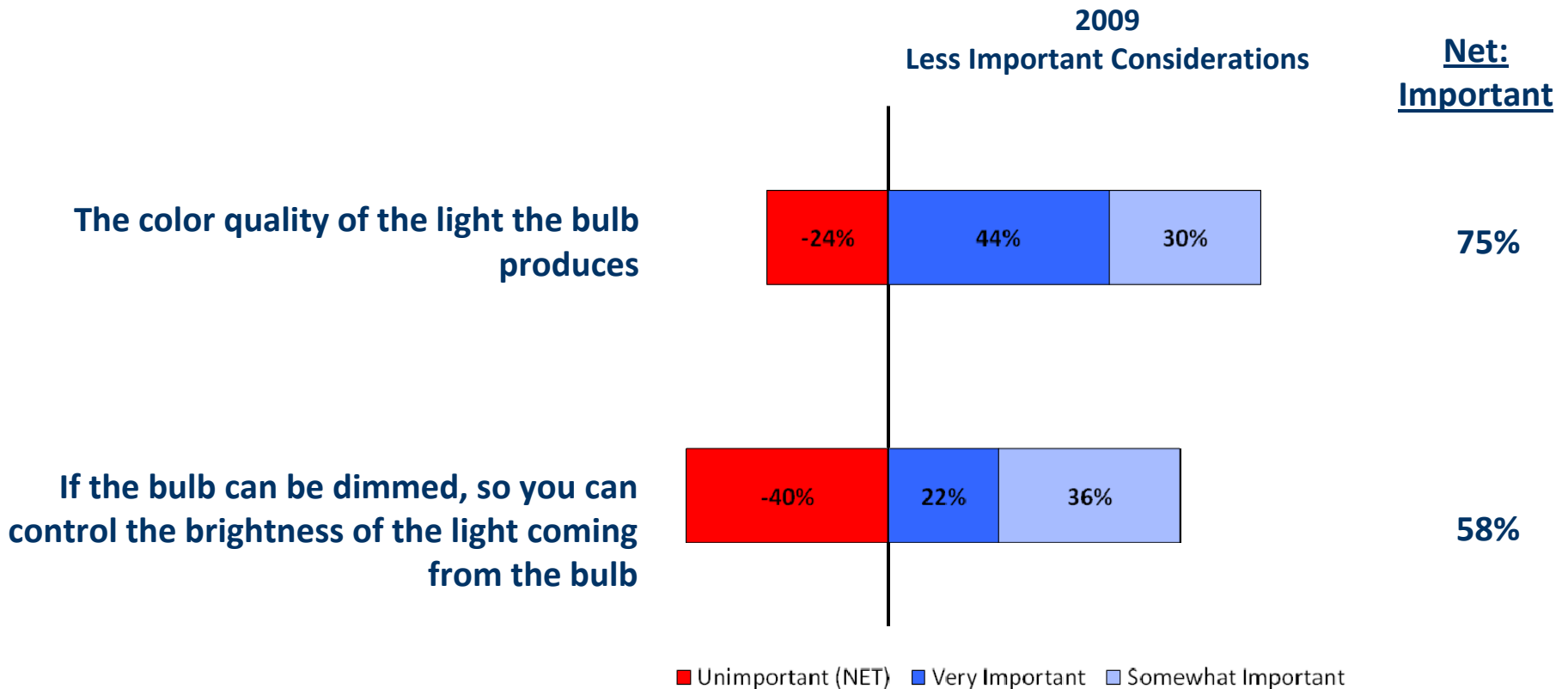
Although energy efficiency is important ,it is not everything. Brightness, longevity and price are also top considerations when choosing a light bulb

Q3. 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.



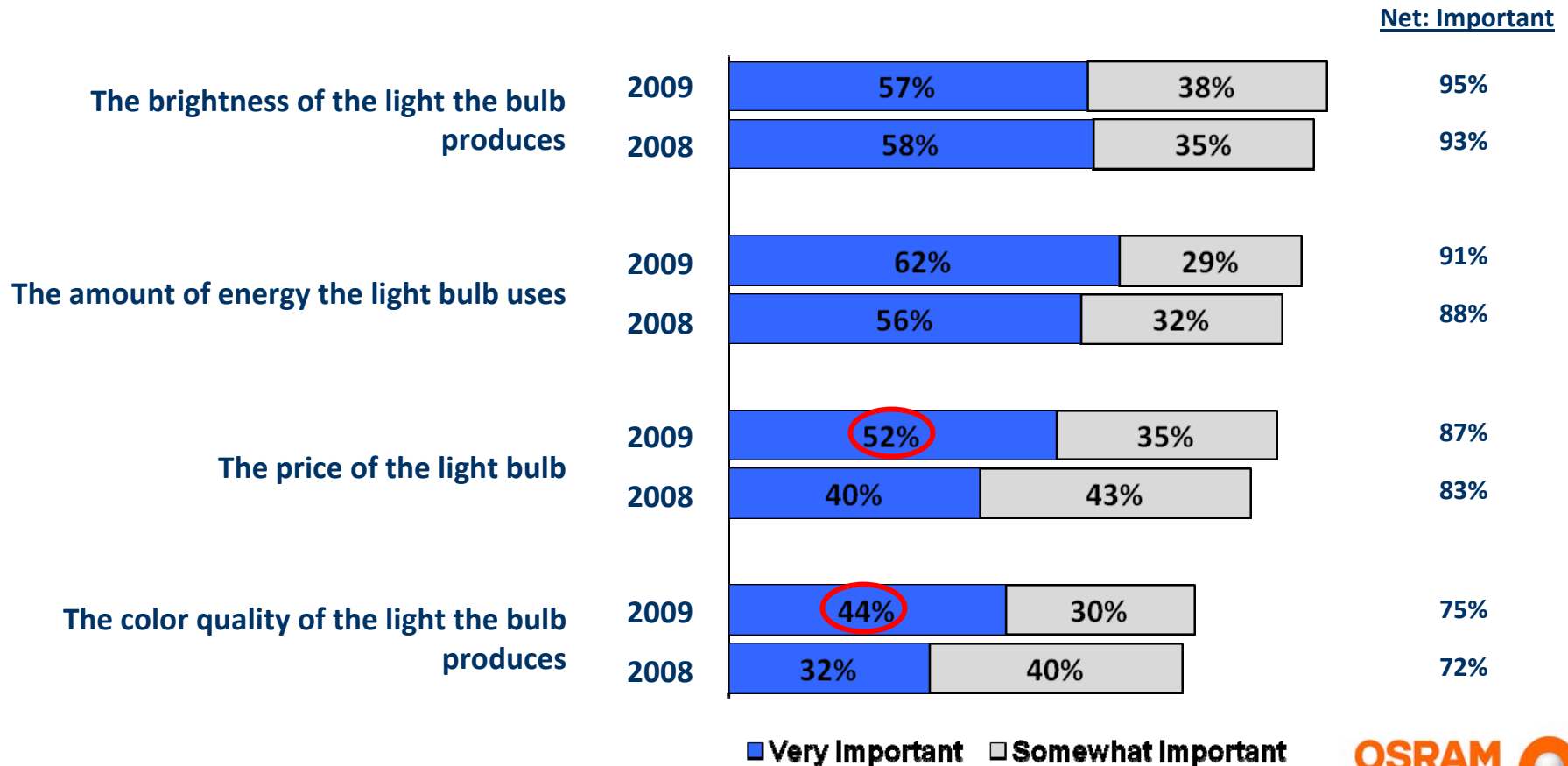
Dimmability and color quality are less important to consumers, but not insignificant – majorities still rate them as important

Q3. 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.



**This year consumers are even more price sensitive – over half say it is a very important consideration in purchasing.
The importance of color quality also increased from 2008**

Q3. 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.



Compact Fluorescent Light Bulbs

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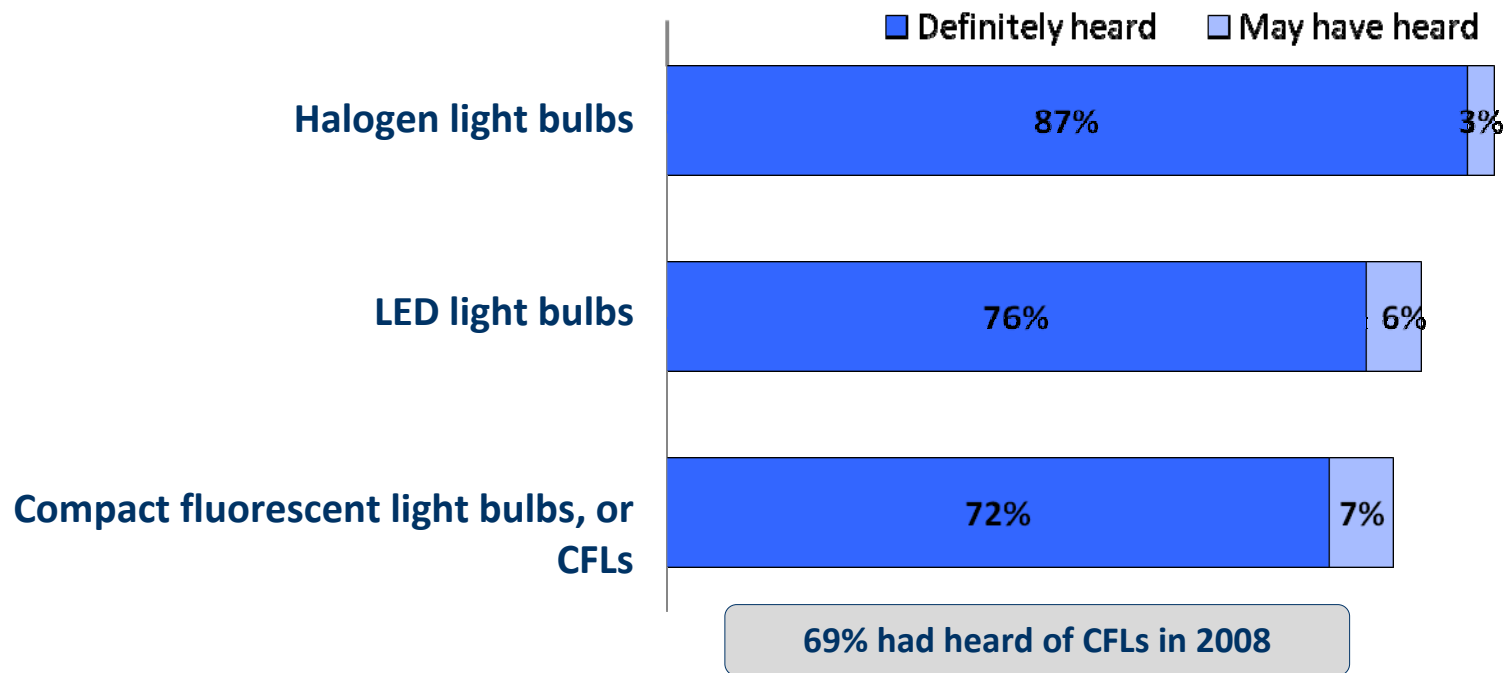
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Although halogens are most widely known, awareness of all new technology bulbs is very high

Q4. 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.

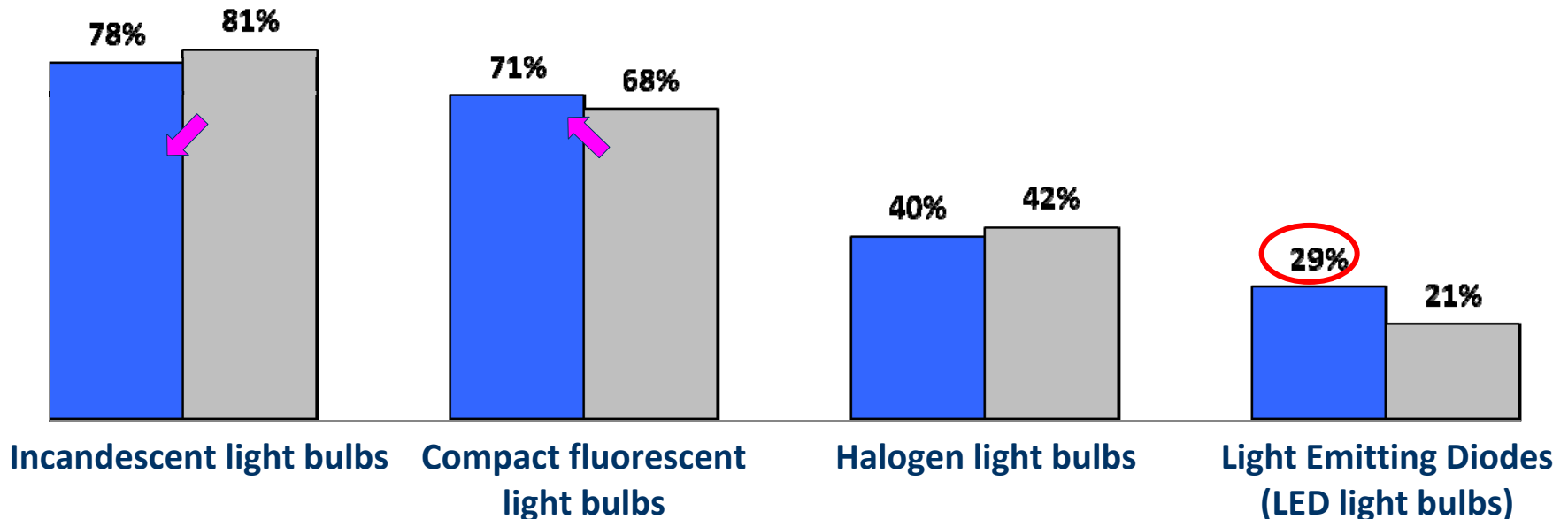
Heard of this type of bulb?



The gap between traditional light bulbs and CFLs is narrowing. Incandescents topped CFLs by 7 points in 2009 – down from a spread of 13 points last year

Q5. 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.

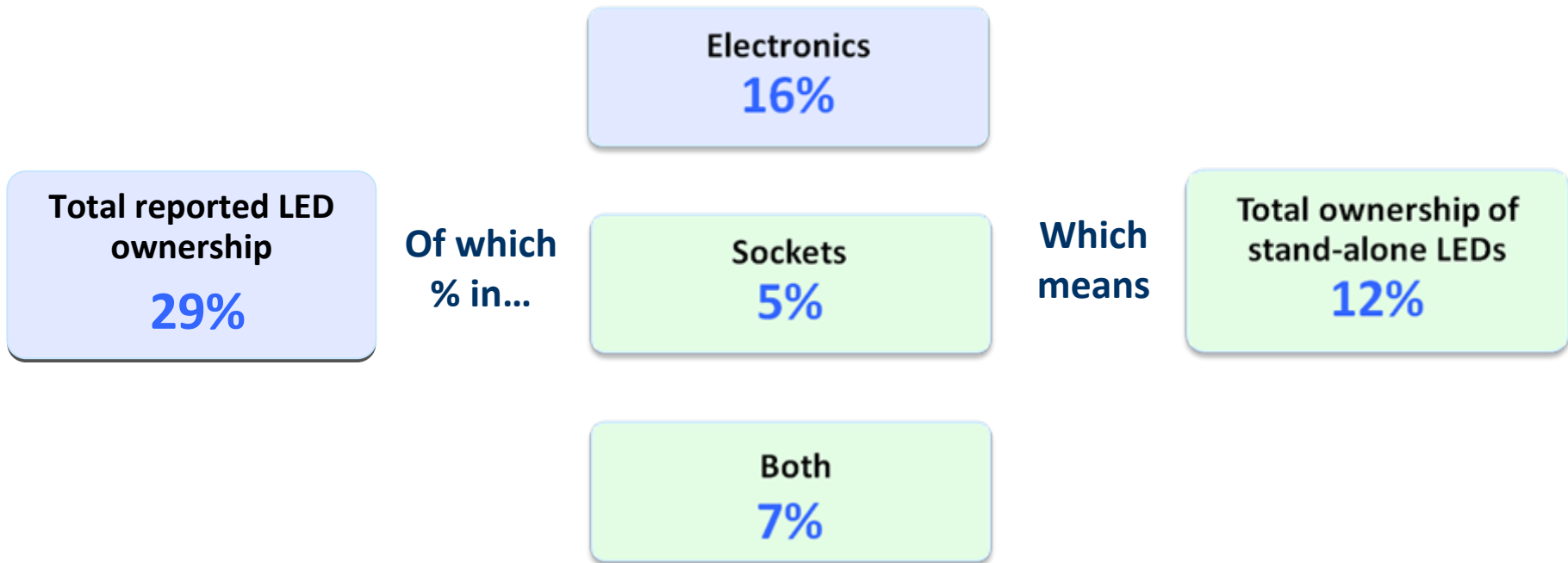
% Yes



■ 2009 ■ 2008

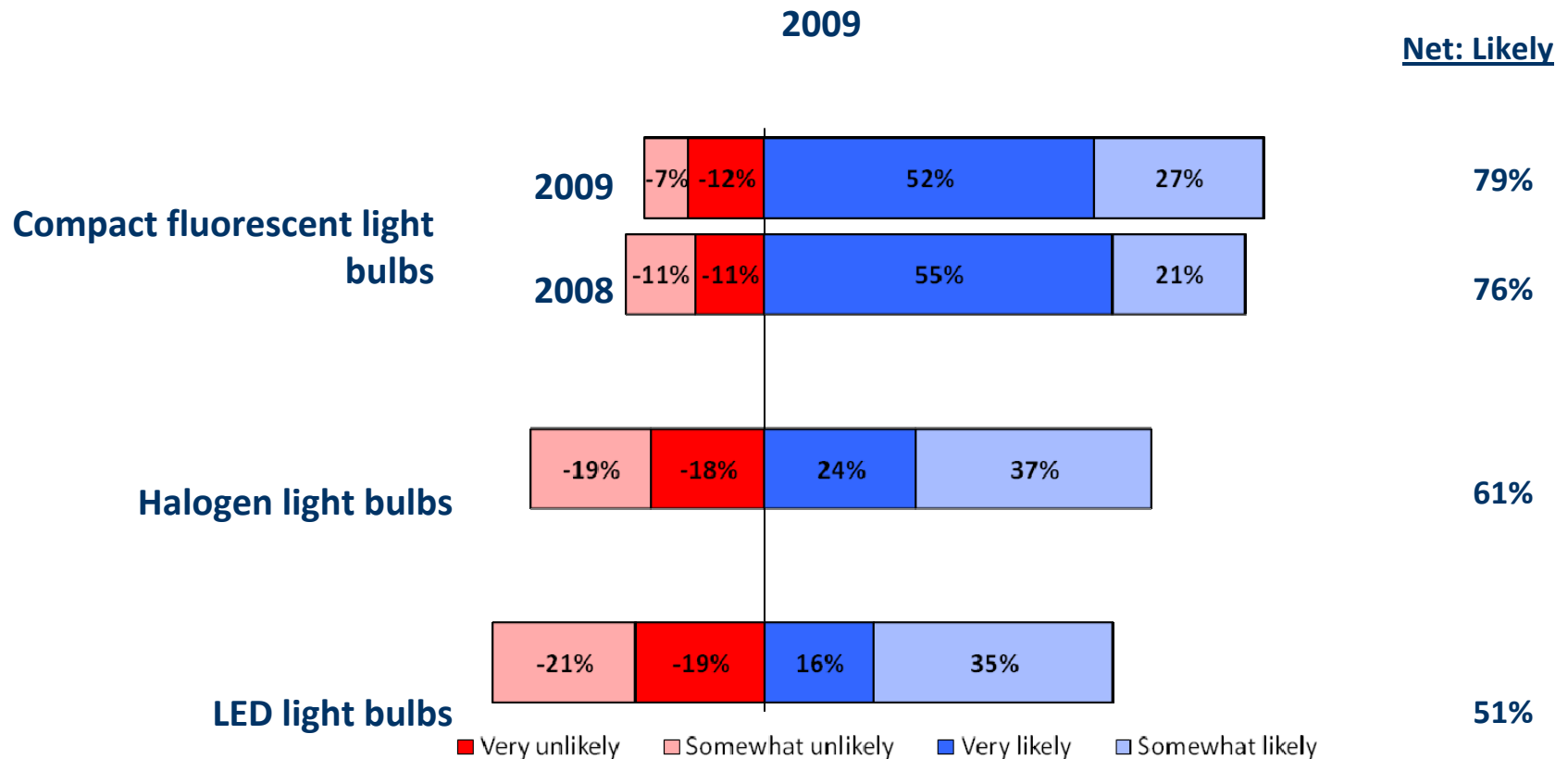
Although almost 3 in 10 say they have LEDs, less than half of those have them as stand-alone light bulbs – just 12% in all

Q6. 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?



Consumers are more likely to purchase CFLs in the future than other types of new technology bulbs

Q7. How likely are you to purchase a _____ in the future?

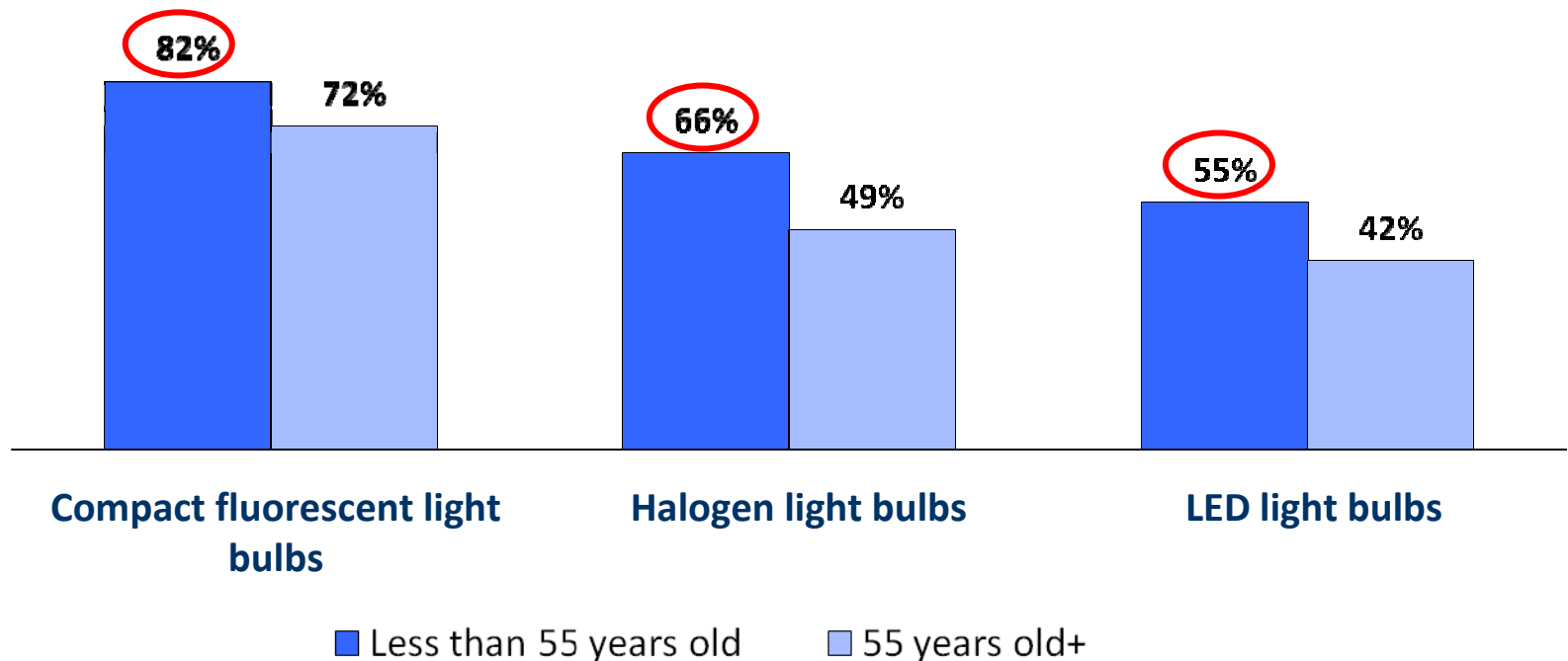


Younger consumers are more likely to say they would purchase all types of new technology light bulbs

Q7. How likely are you to purchase a _____ in the future?

2009

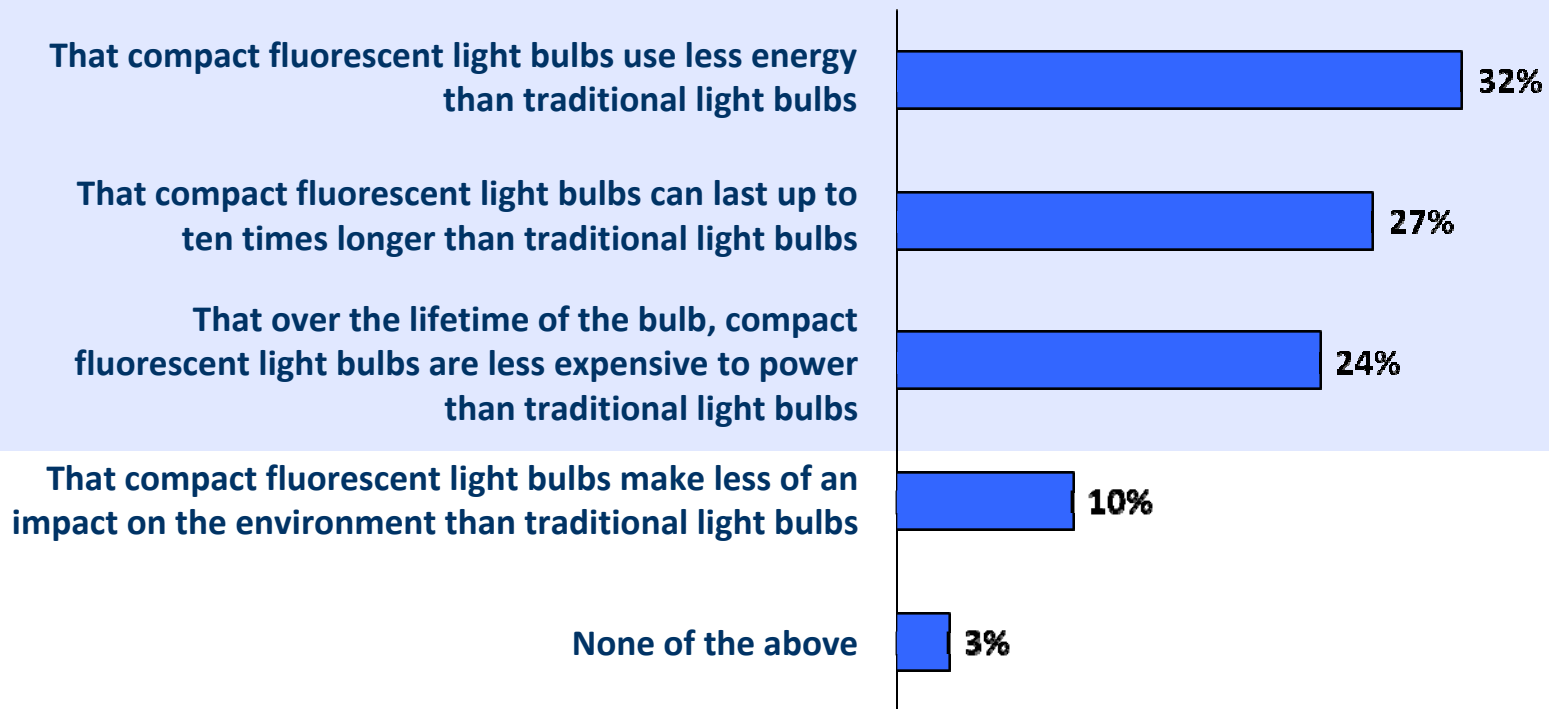
% very/somewhat likely



Energy efficiency, longevity and value for the money are the primary benefits to purchasing CFLs

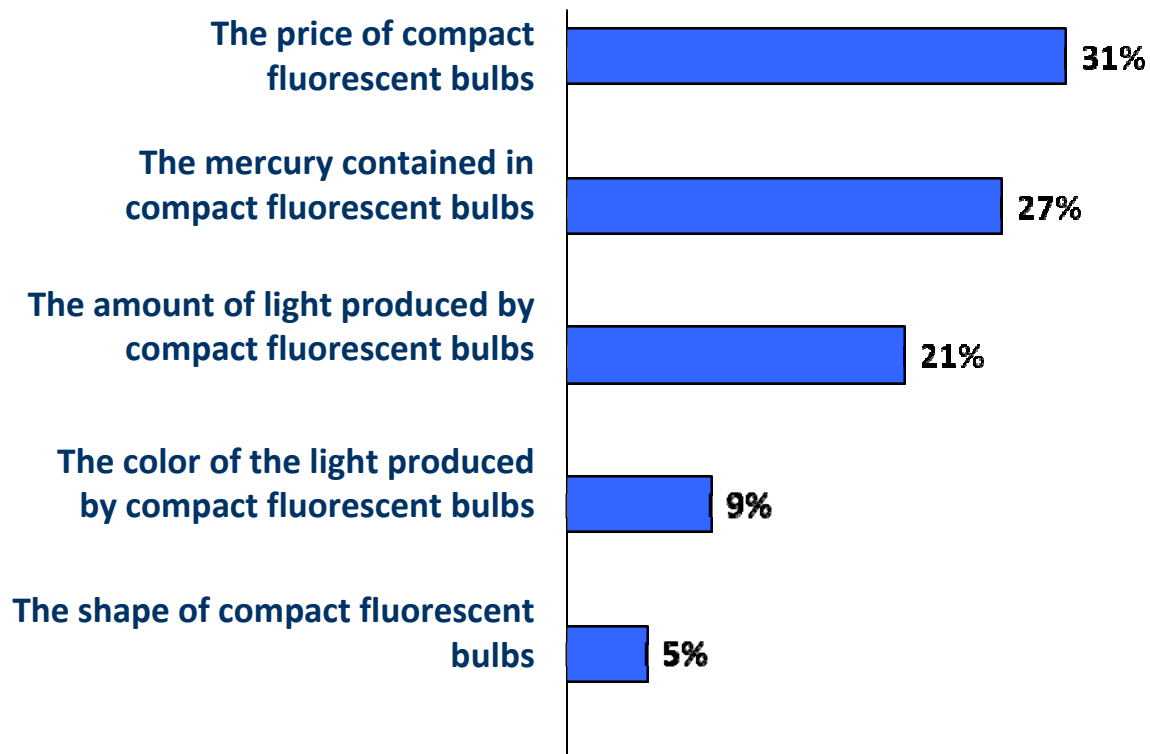
Q8. Which one of the following would be the biggest benefit to purchasing compact fluorescent light bulbs for your home?

2009



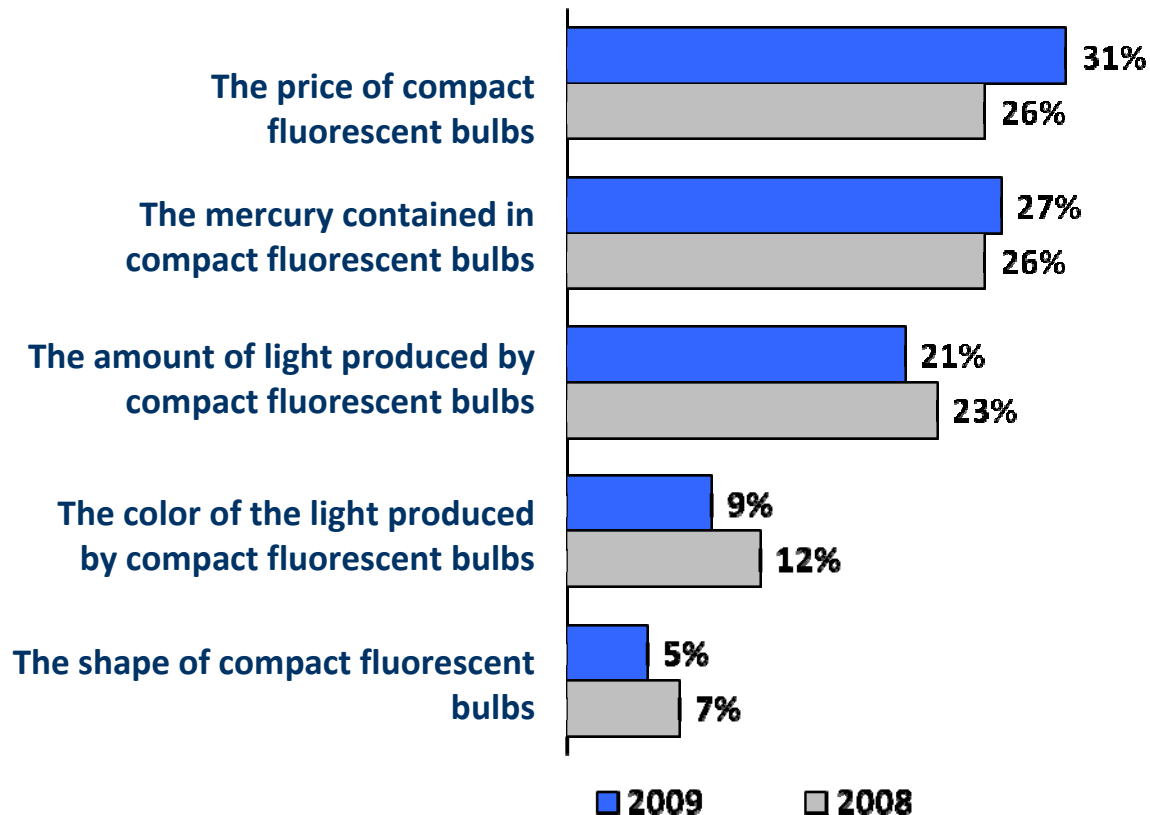
Older and younger consumers are more concerned about mercury, while those 35-54 are more concerned about cost

Q9. Which of the following would be your biggest concern about purchasing compact fluorescent light bulbs for your home?



With no significant changes from 2008, price, mercury content and the amount of light produced by CFLs remain consumers' major concerns

Q9. Which of the following would be your biggest concern about purchasing compact fluorescent light bulbs for your home?



Awareness of the Legislation and Future Steps

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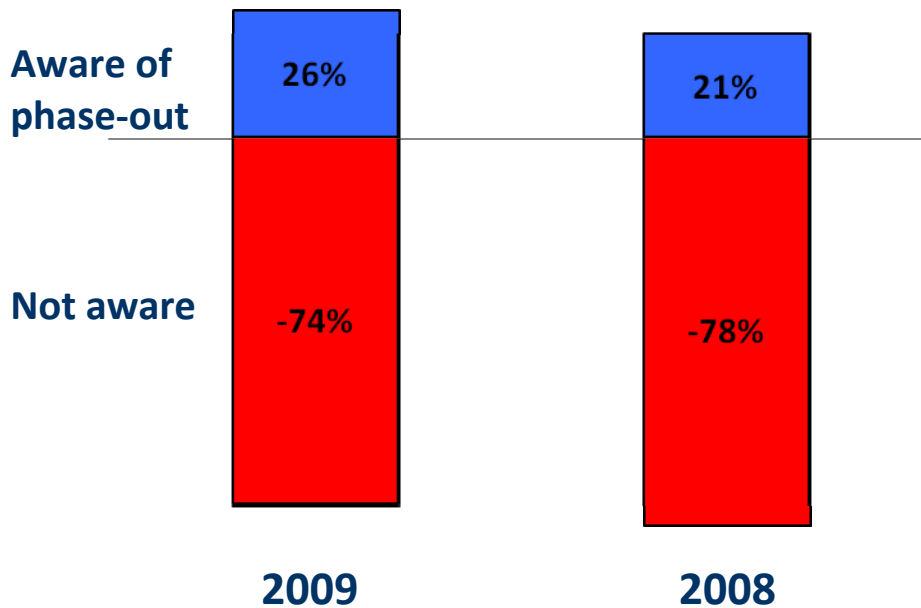


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Awareness of the legislation to phase-out incandescent light bulbs by 2014 remains low, although it has increased among some segments

Q10. In 2007 Congress passed legislation that will ban most traditional incandescent light bulbs by 2014. Before today were you aware of this legislation?



Who is most likely to know about the phase-out?

Caucasians (30% vs. 14%), those with college education (38% vs. 19%) and higher income respondents (34% \$50K+ vs. 21% <\$50K)

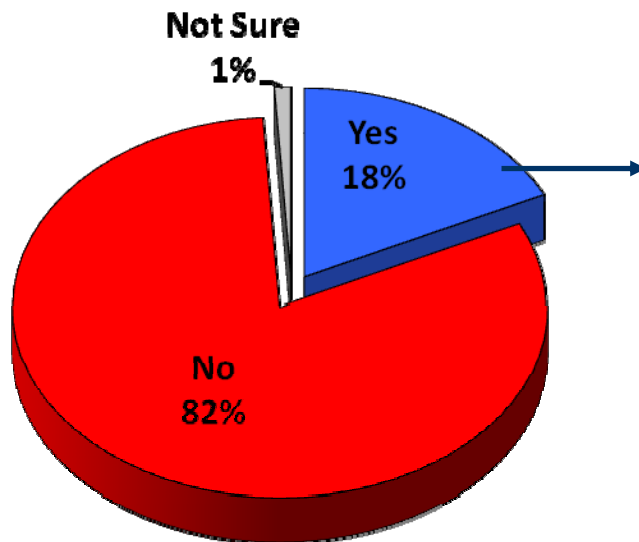
What's changed from 2009?

There has been a significant increase in awareness from 2008 among Caucasians (30% 2009 vs. 22% 2008) and a directional increase among respondents age 55+ (33% 2009 vs. 22% 2008) and those with college education (38% 2009 vs. 27% 2008)

Even fewer are aware that 100-watt bulbs will be phased-out by 2012

Q11. As part of the legislation, traditional 100 watt light bulbs will NO LONGER BE SOLD after January 1, 2012. Before today, were you aware that 100 watt light bulbs will be eliminated by 2012?

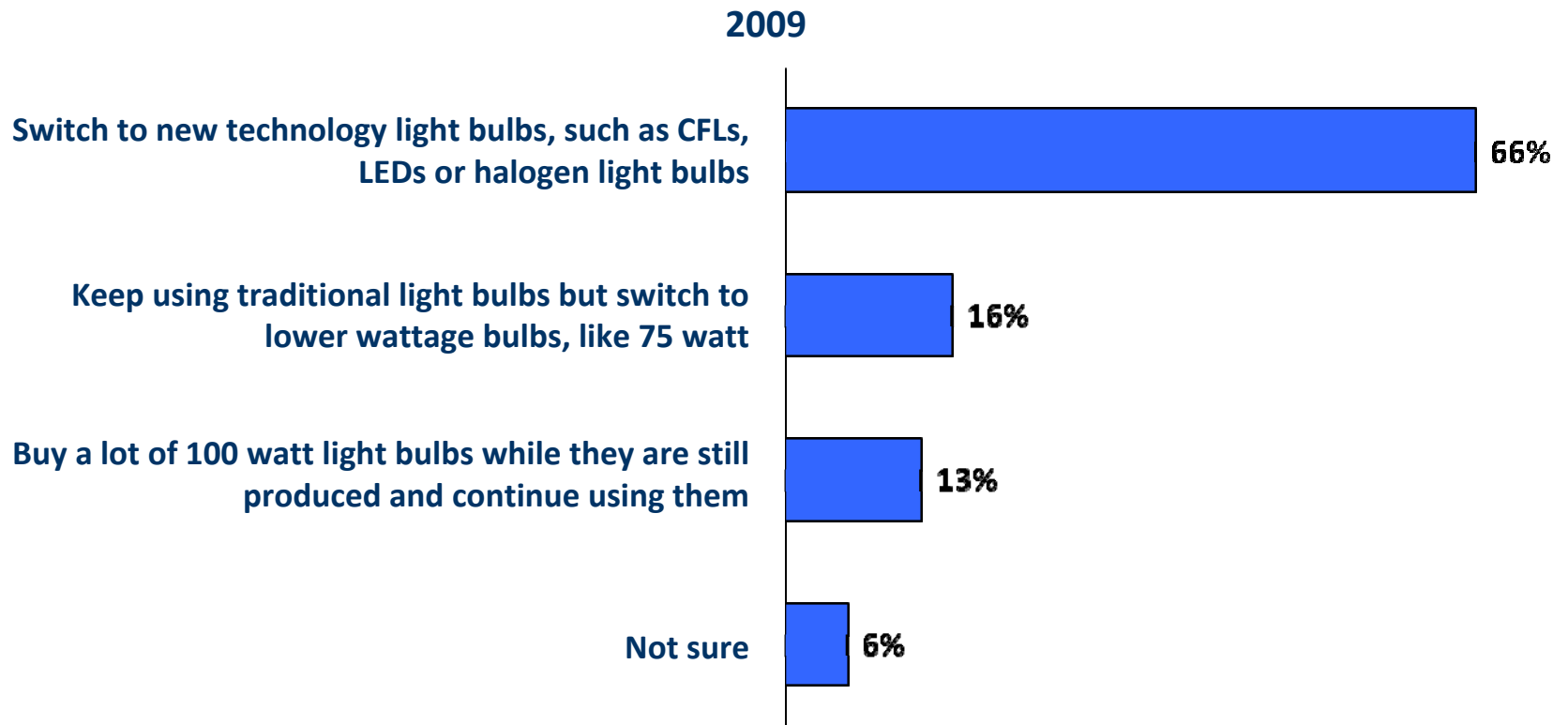
2009



Who is most likely to know about the 100W phase-out?
Males (23%) vs. females (13%)
Caucasians (20%) vs. Non-Caucasians (8%)

Consumers are most likely to switch to new technology light bulbs once traditional light bulbs are phased out...

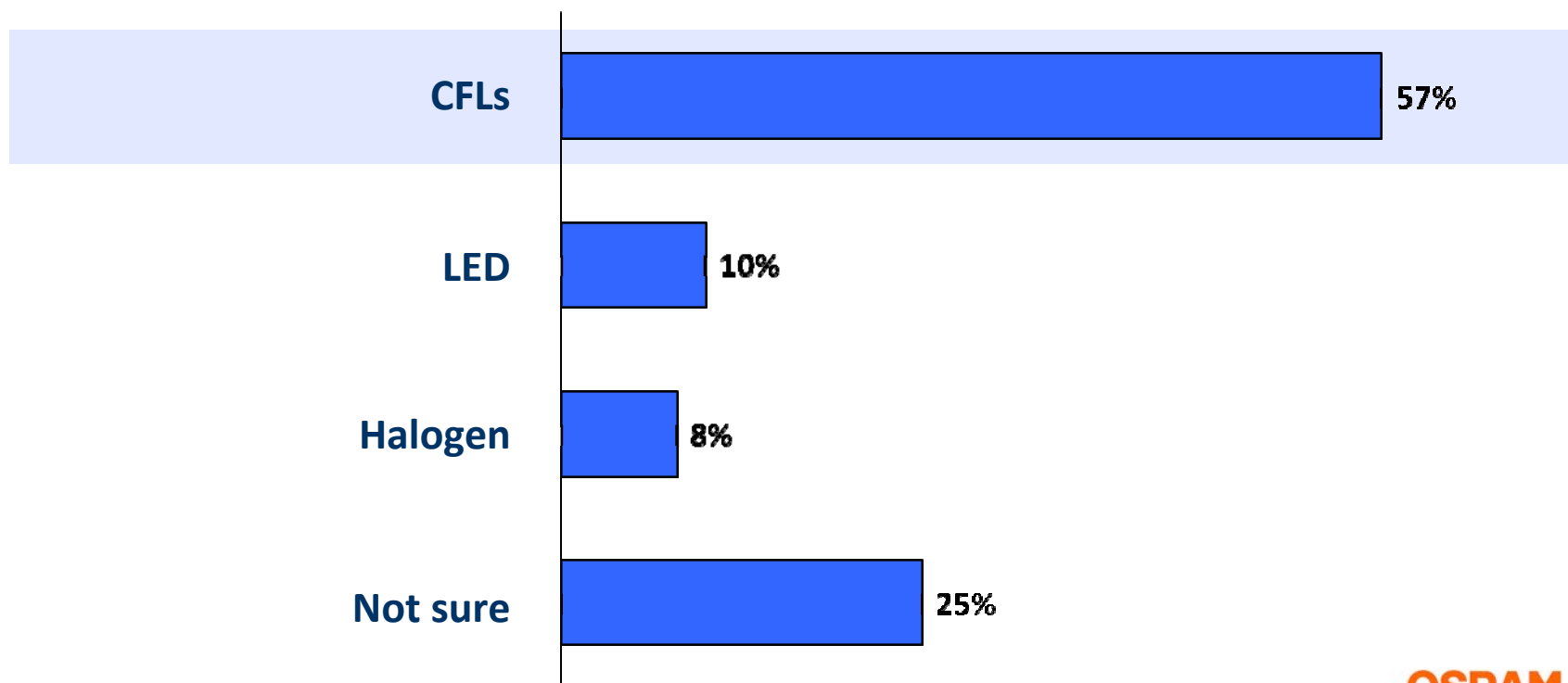
Q12. When traditional 100-watt light bulbs are eliminated, which ONE of the following are you most likely to do?



...And CFLs are the most likely choice

Q13. You said you're most likely to switch to a new technology light bulb. Which type of new technology light bulb are you most likely to switch to: LED, halogen, or CFLs or are you not sure yet?

2009



Demographics

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Respondent Attributes

Age	2009	2008	Income	2009	2008
18 to 24	12%	3%	Under \$20,000	8%	8%
25 to 34	19%	8%	\$20,000 to less than \$30,000	10%	9%
35 to 44	22%	14%	\$30,000 to less than \$40,000	11%	11%
45 to 54	17%	21%	\$40,000 to less than \$50,000	16%	7%
55 to 64	11%	23%	\$50,000 to less than \$75,000	16%	15%
65 to 74	14%	17%	\$75,000 to less than \$100,000	12%	12%
75+	6%	16%	\$100,000 to less than \$150,000	9%	10%
			\$150,000 or more	6%	7%
			Don't know/ Refused	12%	20%
Education			Location		
8 th grade or less	1%	*	Urban	28%	23%
Some high school	5%	4%	Suburban	53%	54%
Completed high school	22%	26%	Rural	18%	23%
Vocational school	6%	4%	Ethnicity		
Some university/college	27%	22%	White	72%	83%
Completed university/college	26%	22%	Black or African American	12%	7%
Postgraduate degree	14%	20%	Hispanic	9%	3%
Don't know/ Refused	-	2%	American Indian or Alaskan	1%	1%
			Native		
			Asian	2%	1%
			Other	*	2%
			Don't know/ Refused	4%	3%
Region			Gender		
Northeast	19%	20%	Male	48%	48%
Midwest	23%	24%	Female	52%	52%
South	36%	31%			
West	23%	25%			

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