OSRAM SYLVANIA Socket Survey 6.0
2013 Research Results

Conducted by KRC Research | December 2013

Background and Methodology

The Socket Survey 6.0 is OSRAM SYLVANIA's tracking survey of consumer attitudes and behaviors around lighting options, conducted annually since 2008.

	2013	2012	2011	2010	2009	2008
METHOD:	Landline and cell phone telephone survey				Landline telephone survey	
DATA COLLECTION:	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:	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 random digit dialing					
MARGIN OF ERROR: **(At 95% Confidence)**	±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

This document contains results and analysis from the 6th round of research.

Executive Summary

Bulb Purchasing

- Almost all consumers are involved in light bulb purchase decision making in their households, and are most likely to get information about bulbs from in store displays or employees.

Bulb Factors

- Since the first Socket Survey in 2008, Americans are increasingly citing getting more or less light and better light quality as reasons to switch bulbs.
- Brightness and longevity remain the most important factors when consumers are evaluating light bulb options.

Bulb Usage

- Americans are most familiar with halogens as an alternative to incandescent bulbs, and a majority are also aware of LEDs and CFLs.
- Consumers say they're using various types of light bulbs at relatively consistent levels in their home despite the ongoing phase out.

LED Bulbs

- While usage of LEDs remains low, consumers are interested in many of the potential benefits of LEDs.
- Longevity, amount of light and price are the most important factors to consumers when considering buying LED bulbs.

Executive Summary

Phase Out

- When aided, most consumers are aware of the 2007 phase out of traditional incandescent bulbs, though only 4 in 10 are aware of the continued phase out taking effect in January 2014.
- A majority of consumers say they're excited for the phase out because more Americans will be using newer technology bulbs.

Consumer Adoption

- As a result of the legislation, most say they'll switch to newer technology bulbs: Half will switch to CFLs, a quarter will switch to LEDs.
- However, 3 in 10 consumers say they plan to stock up on incandescent bulbs while they're still available.

Smart Lighting

- Half of consumers are aware of smart lighting options, but only 1 in 10 consumers are interested in purchasing a smart lighting system to control home lighting remotely.

The Lighting Landscape

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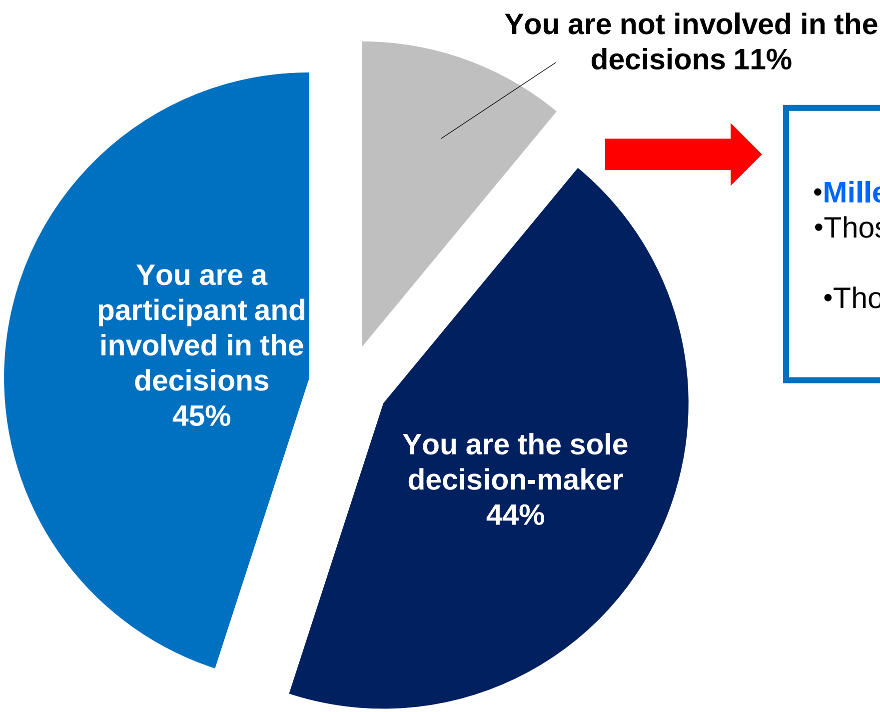
Light Bulb Decision Making

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

Key Finding: Almost all consumers are involved in making purchase decisions about light bulbs. Those who are not involved tend to be younger and less aware of the latest trends in lighting.



Most likely to say they are uninvolved:

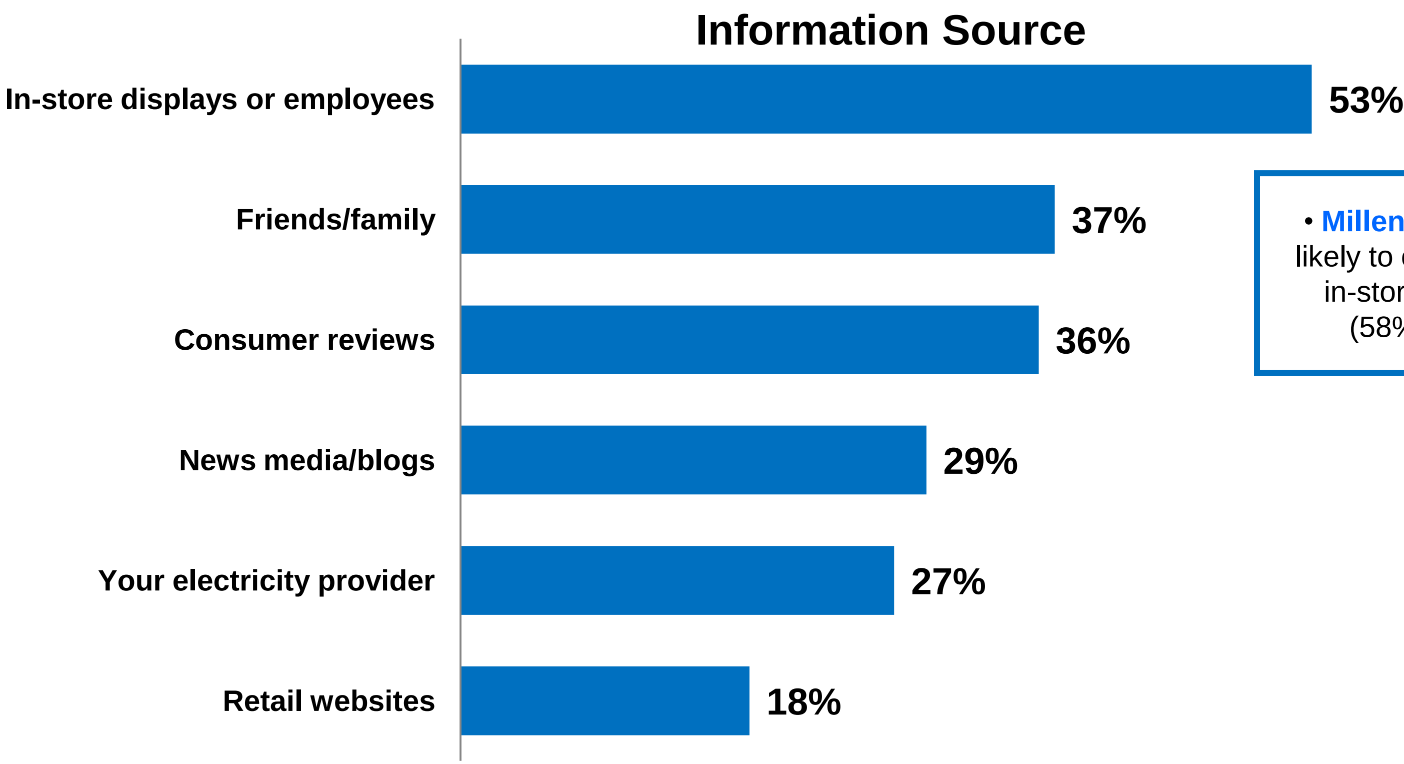
- **Millennials,** ages 18-34 (24%) vs. those ages 55+ (6%)
- Those **who haven't heard of CFLs** (22%) compared to those who have (7%)
- Those **unaware of the 2014 ban** (25%) vs. those who are aware (7%)

Base: 2013 N=300

Sources of Information

Q14. Where do you get your information about what light bulbs to purchase? Please select all that apply.

Key Finding: Americans turn most frequently to in-store displays or store employees for getting information about light bulbs, followed by friends and family and consumer reviews.



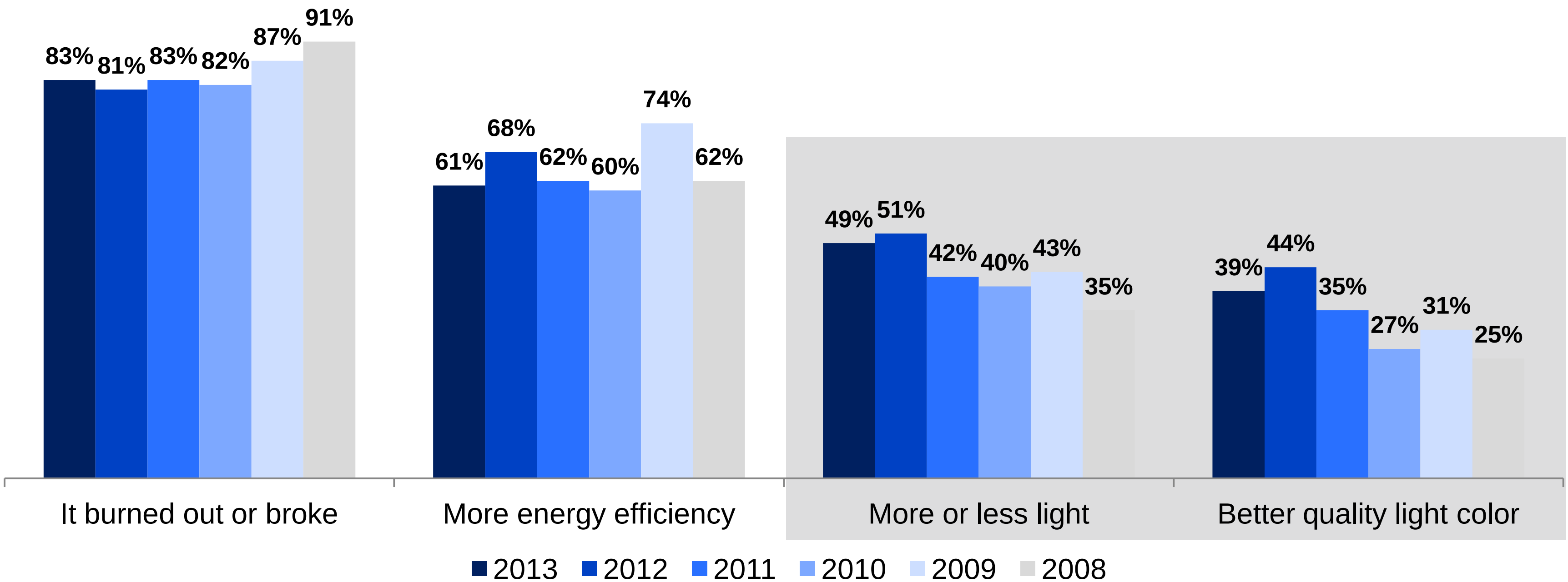
- **Millennials,** ages 18-34 are more likely to obtain their information from in-store displays than those 55+ (58% and 45% respectively)

Base: 2013 N=300

Reasons to Change Light Bulbs

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

Key Finding: While less important than other reasons, since 2008 Americans are increasingly switching bulbs to have more or less light and for better light quality.



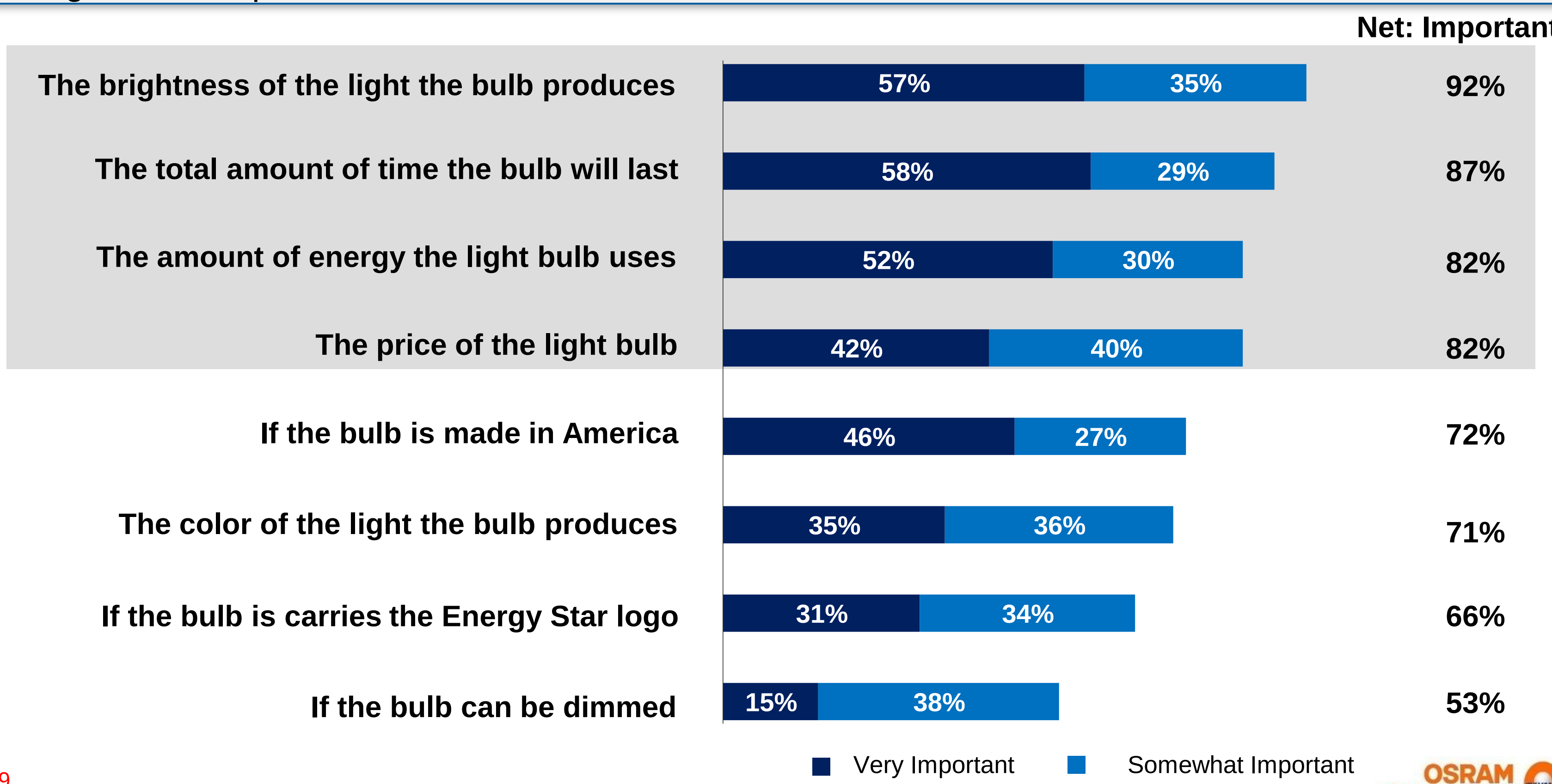
Most likely to have switched for energy efficiency:
Those **ages 55+** (64%) vs. those ages 18-34 (47%)
Those who are **excited for the phase out** (73%) vs. those who are worried (42%)

Base: 2013 N=300

Most Important Properties

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.

Key Finding: Along with brightness, consumers are looking for value in terms of longevity, energy savings and bulb price.



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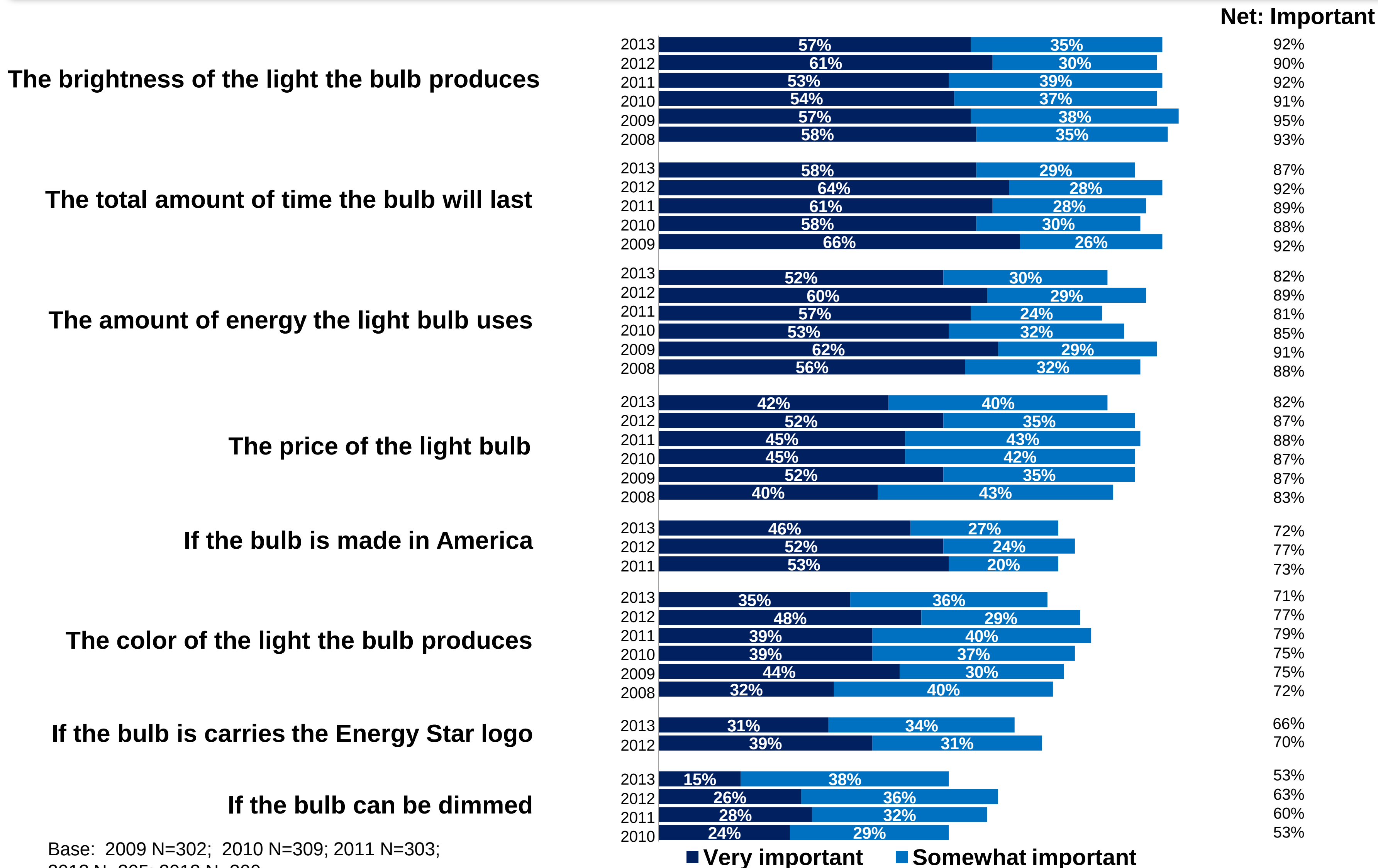
Tracking the Most Important Properties

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: 2009 N=302; 2010 N=309; 2011 N=303; 2012 N=305; 2013 N=300

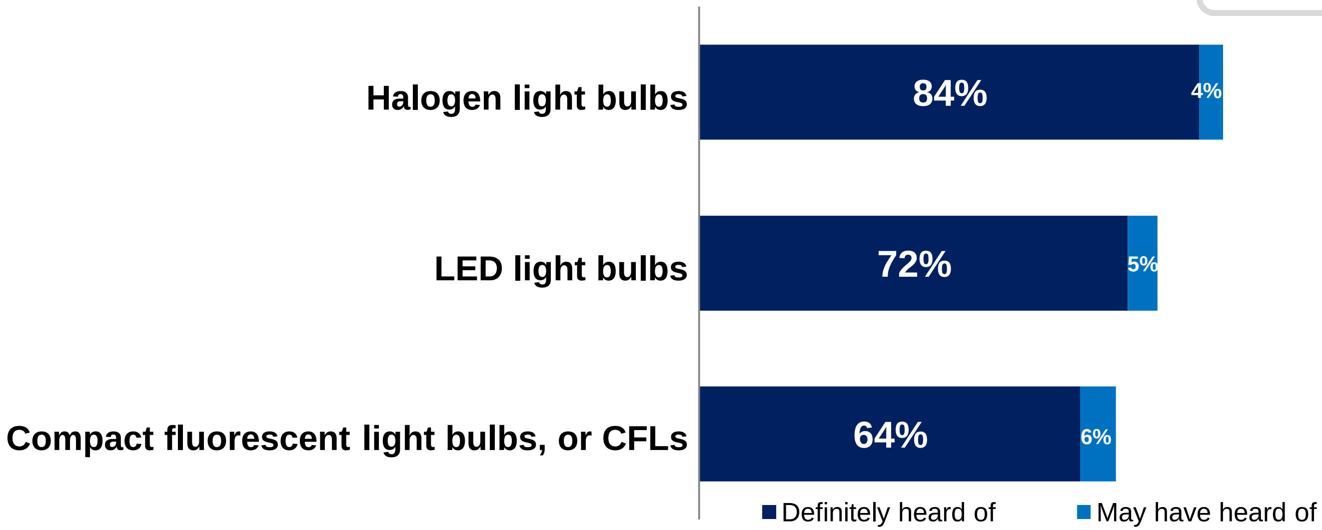
Light Bulb Choices

Awareness of Lighting Options

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.

Key Finding: A majority of consumers are familiar with halogens, LEDs and CFLs, including nearly 9 in 10 who say they've heard of halogens and 8 in 10 who say they've heard of LED light bulbs.

Heard of this type of bulb?



"Definitely" + "May Have" Heard of Tracking Comparison

Halogen light bulbs
88% in 2013
89% in 2012
91% in 2011
86% in 2010

LED light bulbs
77% in 2013
69% in 2012
80% in 2011
81% in 2010

Compact fluorescent light bulbs, or CFLs
70% in 2013
70% in 2012
68% in 2011
68% in 2010

Most likely to have heard of LEDs
- Those with a **college degree** (82%)
- Those **with household incomes over $50k** (82%)
- Those **living in suburban areas** (75%)

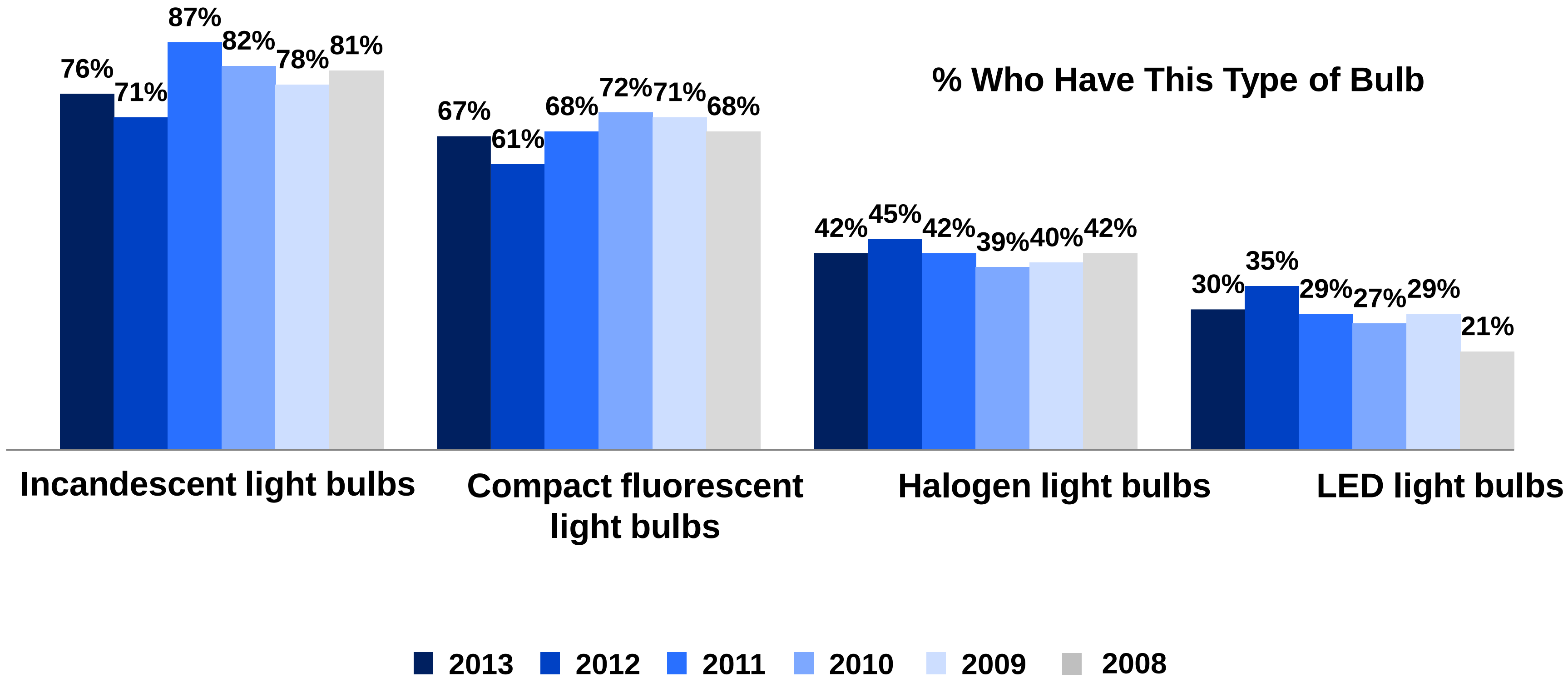
Those most likely to have not heard of LEDs:
- Those **55+** (26%)
- Those with **no college degree** (26%)
- Those **with household incomes under $50K** (28%)

Base: 2013 N=300

Light Bulbs in the Home

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.

Key Finding: Halogen and LED use remain consistent over recent years while there is some fluctuation for incandescent and CFLs, possibly representing consumer confusion over new bulb types.



Base: 2013 N=300

LED Bulb Usage

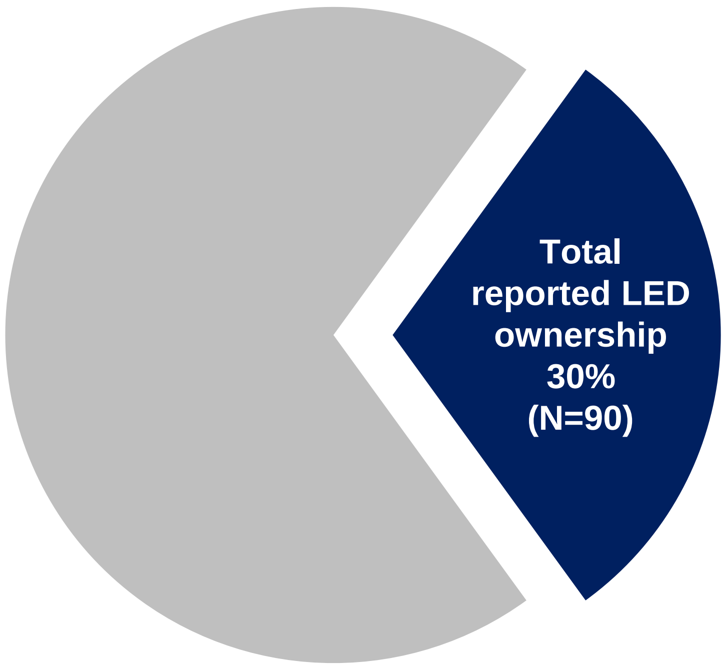
Q7. Are the LED light bulbs in your home being used like traditional light bulbs in light sockets, are they part of electronics you have in your home, or are they in holiday lights?

Key Finding: Reported stand-alone LED bulb ownership remains at a consistent level compared to last year.

Multiple Responses Accepted

Total ownership of stand-alone LEDs
11%

13% in 2012
13% in 2011
9% in 2010



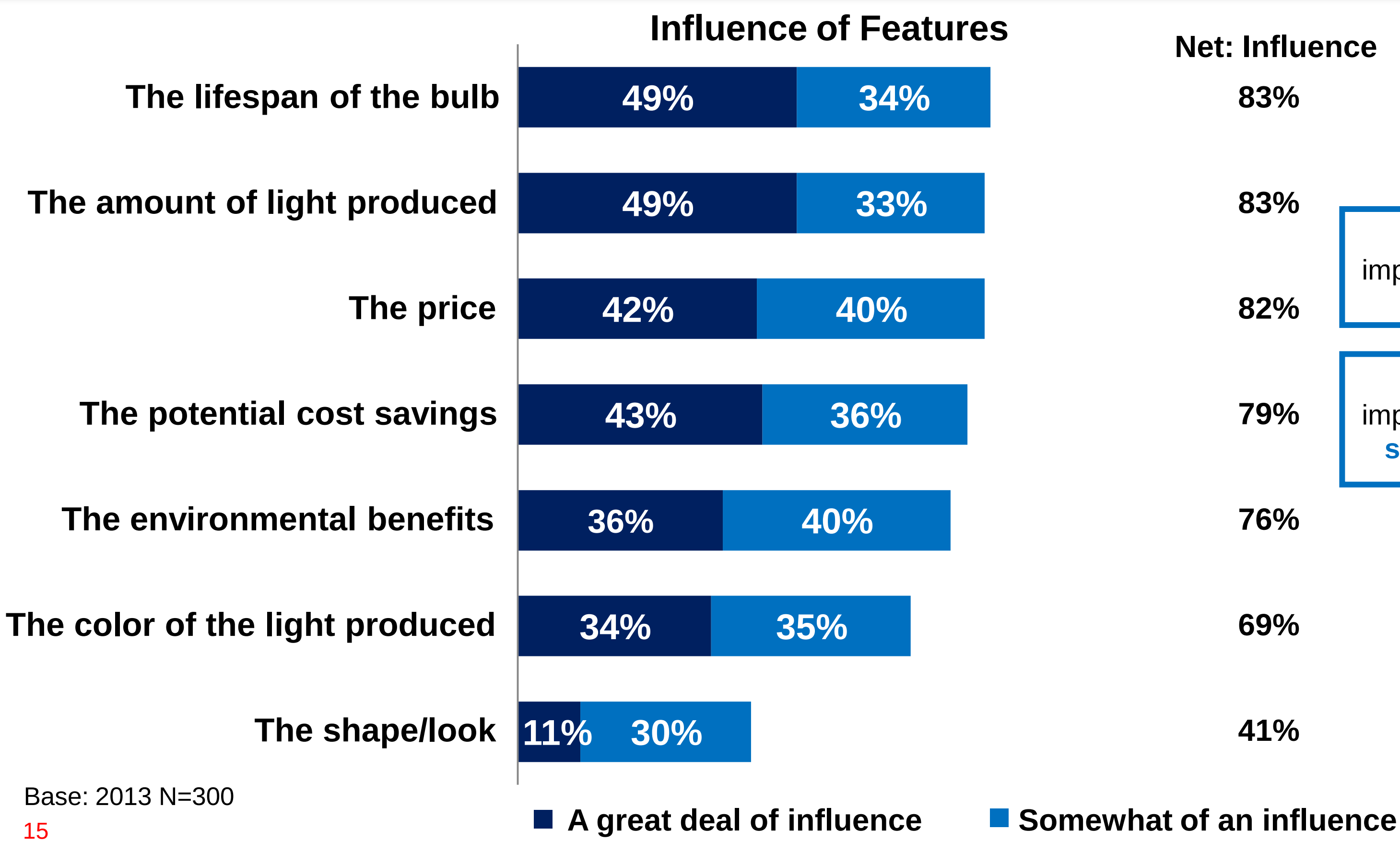
Holiday Lights	55%	2012: 39% 2011: 40%
Electronics	40%	2012: 45% 2011: 48% 2010: 35%
In Sockets	37%	2012: 37% 2011: 44% 2010: 33%

Base: 2013 N=300
Please note small base sizes for total reported LED ownership. Year to year changes should be considered directional in nature.

LED Bulb Features

Q8. When thinking about LED light bulbs, how much would the following features influence your decision to buy one?

Key Finding: Consumers are most interested in the increased lifespan and accompanying savings of LED bulbs along with the amount of light produced.



Light color is most important to those **living in urban areas** (76%)

Shape/look is most important to those **living in suburban areas** (47%)

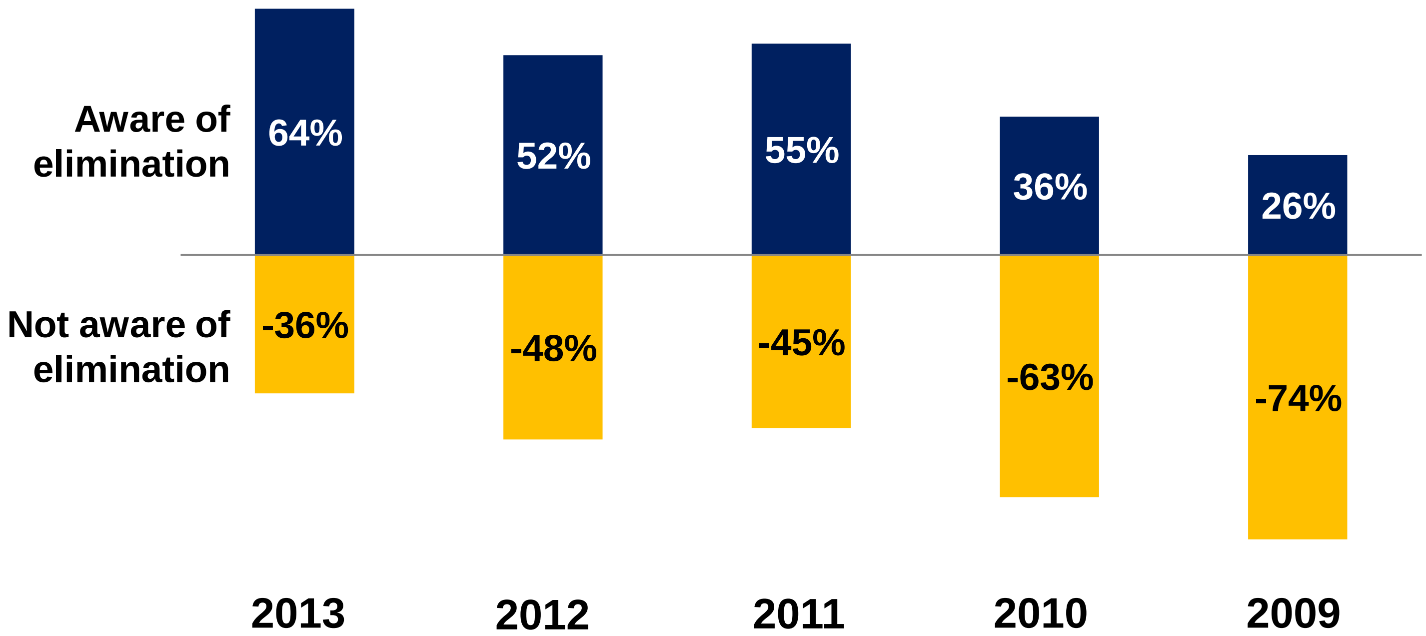
Base: 2013 N=300

The Future of Lighting

Awareness of 2007 Phase Out

Q9. Prior to this survey, were you aware of legislation, enacted in 2007, that has been phasing out traditional incandescent light bulbs?

Key Finding: More consumers say they're aware of the phase out compared to previous years.

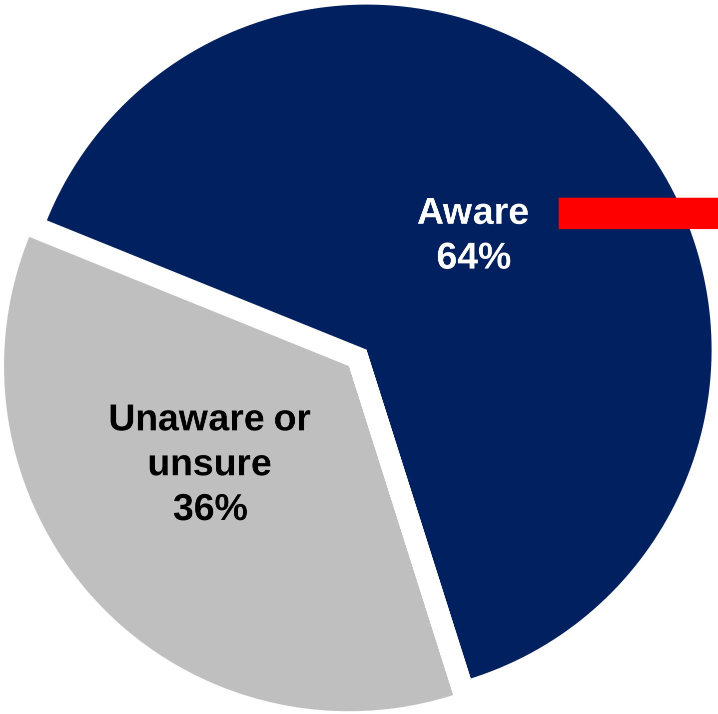


Base: 2013 N=300

Awareness of 2007 Phase Out

Q9. Prior to this survey, were you aware of legislation, enacted in 2007, that has been phasing out traditional incandescent light bulbs?

Key Finding: Older age groups, college graduates, those making $50K or more and Caucasians tend to be more aware of the 2007 phase out.



Most likely to be aware of the phase out:

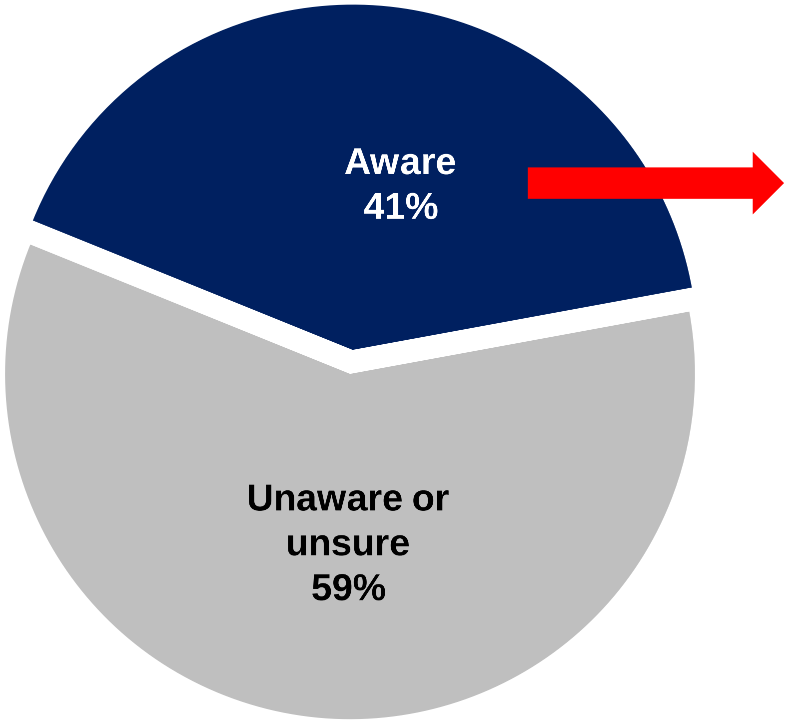
- **Those with a college degree** (75%) vs. those without a degree (56%)
- **Caucasians** (71%) vs. non-Caucasian (40%)
- Consumers **who have heard of CFLs** (75%) vs. those who have not (40%)
- Those **who already have CFLs in their home** (72%) vs. those who do not (51%)
- Those **with household incomes over $50k** (69%) vs. those with household incomes under $50k (55%)
- Those **ages 55+** (71%) vs. those ages 18-34 (38%)

Base: 2013 N=300

Awareness of Continued Phase Out

Q10. And were you aware that as a result of this legislation, in January 2014, both the 40 and 60 watt are also being phased out?

Key Finding: 4 in 10 Americans are aware that both 40 and 60 watt incandescent will also be phased out starting in January 2014.



Most likely to be aware of the phase out:

- **Those with a college degree** (46%) vs. those without a college degree (37%)
- Those **involved in household bulb purchases** (43%) vs. those not involved (20%)
- Consumers **who have heard of CFLs** (47%) vs. those who have not (29%)
- Those **unlikely to use new technology bulbs** (52%) vs. those who are (34%)
- Those **over the age of 55** (48%) vs. those ages 18-34 (29%)

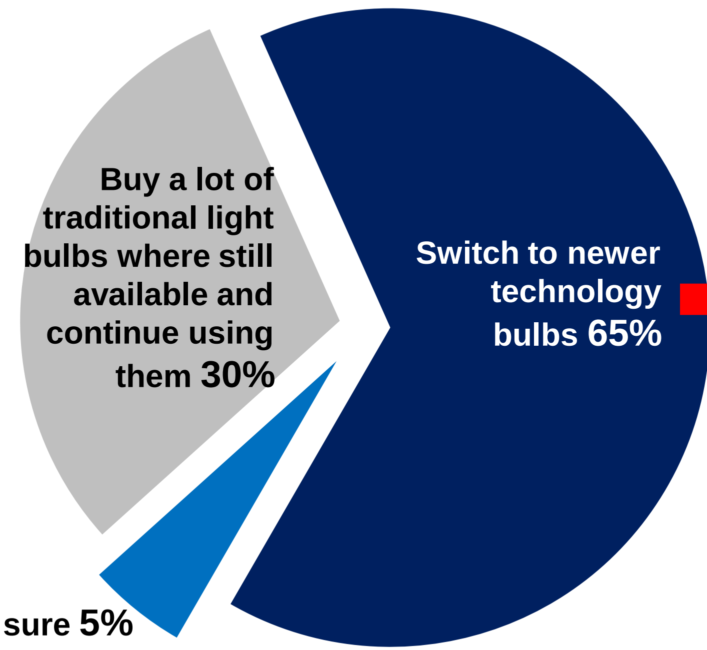
Base: 2013 N=300

Result of Phase Out

Q11. As traditional incandescent light bulbs are being phased out, which ONE of the following are you most likely to do?
Q12. Which type of new technology light bulbs are you most likely to buy?

Key Finding: Americans who plan on switching say they're most likely to switch to CFLs as a result of the phase out of incandescent bulbs. A quarter say they'll switch to LEDs.

Plans After Phase Out



Who's Most Likely to Switch?*
(N=190)

CFLS 46%

Most likely to switch to CFLs:
Caucasians (54%)
Less involved in decision (51%)

LEDs 24%

Most likely to switch to LEDs:
Don't have CFLs (43%)
Not heard of CFLs (36%)

Halogens 13%

Most likely to switch to halogens:
Not heard of CFLs (26%)
Those making less than $50K (21%)

Not sure (16%)

Base: 2013 N=300
Note: Small base sizes, results should be considered directional

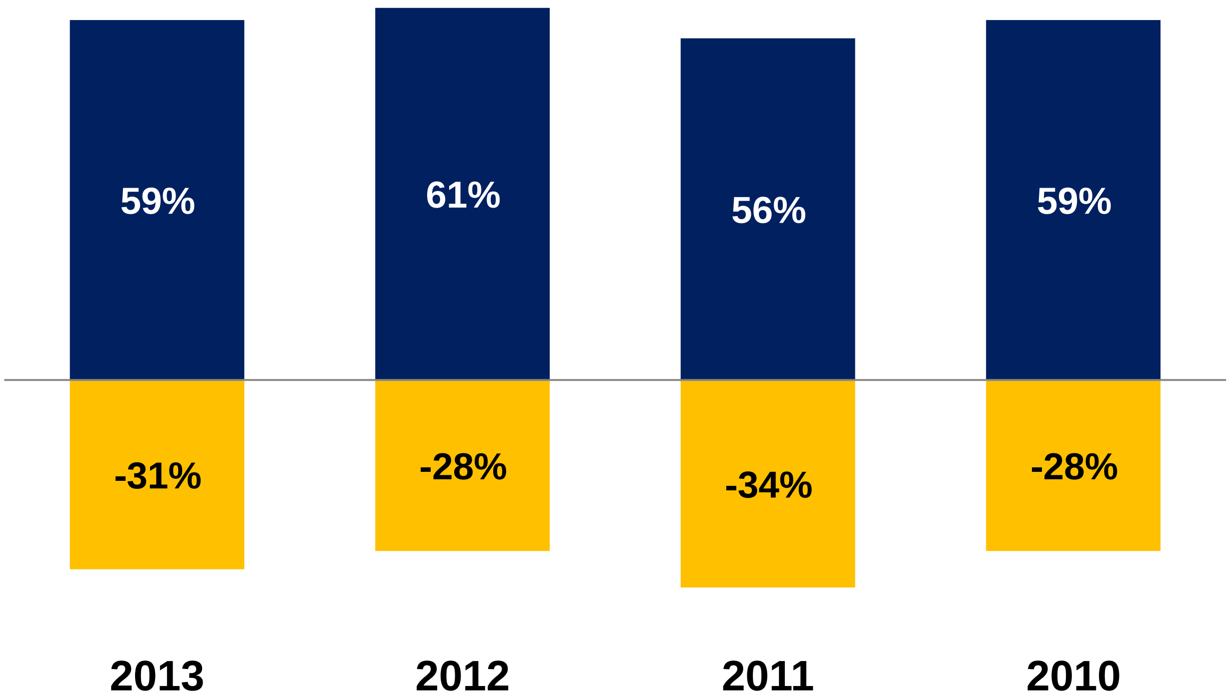
Feelings About Phase Out

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.

Key Finding: Consumers remain excited about the phase out at a similar level compared to previous years.

"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"



Base: 2013 N=300

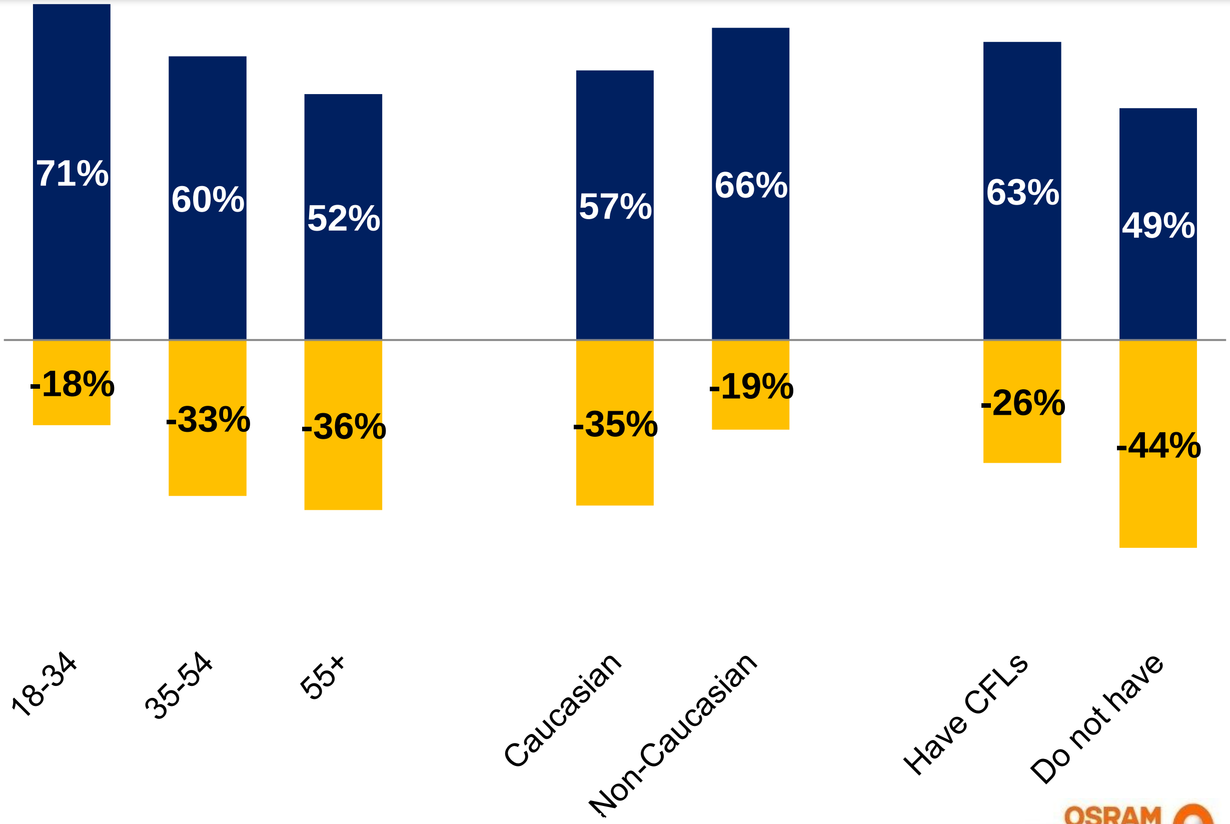
Feelings About Phase Out (cont'd)

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.

Key Finding: Younger consumers, non-Caucasians, and those who already have CFLs are among the most likely to be excited for the phase out.

"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"

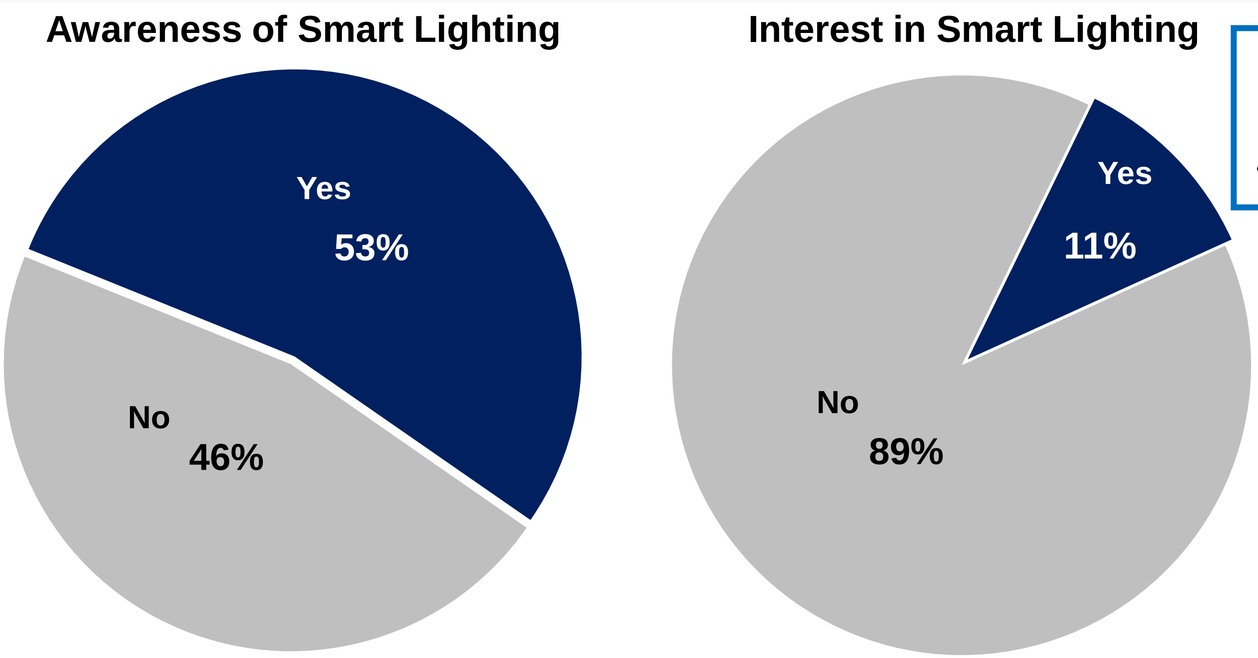


Base: 2013 N=300

Smart Lighting Awareness and Interest

Q15. Are you aware of home automation systems that wirelessly operate and monitor your home lighting also known as "smart lighting"?
Q16. Would you be interested in purchasing a smart lighting system that allows you to operate your lighting from your smart phone, tablet or computer?

Key Finding: About half of Americans are aware of smart lighting, however only 1 in 10 say they're interested in purchasing a smart lighting system to control their lighting remotely.



Most likely to be interested*: (N=31)
- Those **living in urban areas** (18%)
- Those **with a college degree** (15%)
- Those **excited for the phase out** (14%)

Base: 2013 N=300
**Note: Small base sizes, results should be considered directional*

Demographics

Audience Profile

Age	2013	2012	2011	2010	2009	2008
18 to 24	9%	10%	10%	13%	12%	3%
25 to 34	10%	10%	9%	14%	19%	8%
35 to 44	12%	14%	12%	15%	22%	14%
45 to 54	25%	22%	27%	23%	17%	21%
55 to 64	20%	20%	23%	18%	11%	23%
65 to 74	14%	14%	11%	11%	14%	17%
75+	10%	10%	9%	6%	6%	16%
Education						
8th grade or less	1%	1%	1%	1%	1%	*
Some high school	5%	4%	4%	5%	5%	4%
Completed high school	28%	31%	28%	33%	22%	26%
Vocational school/trade school	4%	3%	3%	7%	6%	4%
Some university/college	22%	19%	25%	18%	27%	22%
Completed university/college	27%	25%	25%	21%	26%	22%
Postgraduate degree	12%	15%	13%	15%	14%	20%
Don't know/ Refused	-	3%	1%	1%	-	2%
Region						
Northeast	19%	n/a	n/a	18%	19%	20%
Midwest	21%	n/a	n/a	28%	23%	24%
South	37%	n/a	n/a	33%	36%	31%
West	23%	n/a	n/a	21%	23%	25%
Last Evaluated Lighting*						
Less than six months ago	-	35%	40%	34%	-	-
At least six months ago but less than one year	-	19%	20%	17%	-	-
At least one year but less than three years ago	-	15%	10%	13%	-	-
Three or more years	-	6%	8%	9%	-	-
Have not evaluated	-	23%	20%	25%	-	-

Income	2013	2012	2011	2010	2009	2008
Under $20,000	9%	8%	12%	14%	8%	8%
$20,000 to less than $30,000	13%	9%	10%	11%	10%	9%
$30,000 to less than $40,000	13%	10%	10%	8%	11%	11%
$40,000 to less than $50,000	10%	8%	13%	11%	16%	7%
$50,000 to less than $75,000	17%	15%	14%	15%	16%	15%
$75,000 to less than $100,000	15%	13%	10%	15%	12%	12%
$100,000 to less than $150,000	8%	10%	10%	7%	9%	10%
$150,000 or more	7%	6%	8%	4%	6%	7%
Location						
Urban	30%	26%	27%	26%	28%	23%
Suburban	48%	50%	55%	56%	53%	54%
Rural	22%	22%	18%	19%	18%	23%
Ethnicity						
White	72%	75%	78%	76%	72%	83%
Black or African American	11%	8%	11%	9%	12%	7%
Hispanic	7%	4%	5%	8%	9%	3%
American Indian or Alaskan Native	1%	1%	1%	*	1%	1%
Asian	1%	3%	1%	2%	2%	1%
Native Hawaiian or other Pacific Islander	-	1%	*	n/a	*	n/a
Other	5%	1%	1%	1%	*	2%
Don't know/ Refused	3%	7%	4%	3%	4%	3%
Gender						
Male	50%	49%	48%	48%	48%	48%
Female	50%	51%	52%	52%	52%	52%

**Question not asked in 2013, 2009 or 2008*