

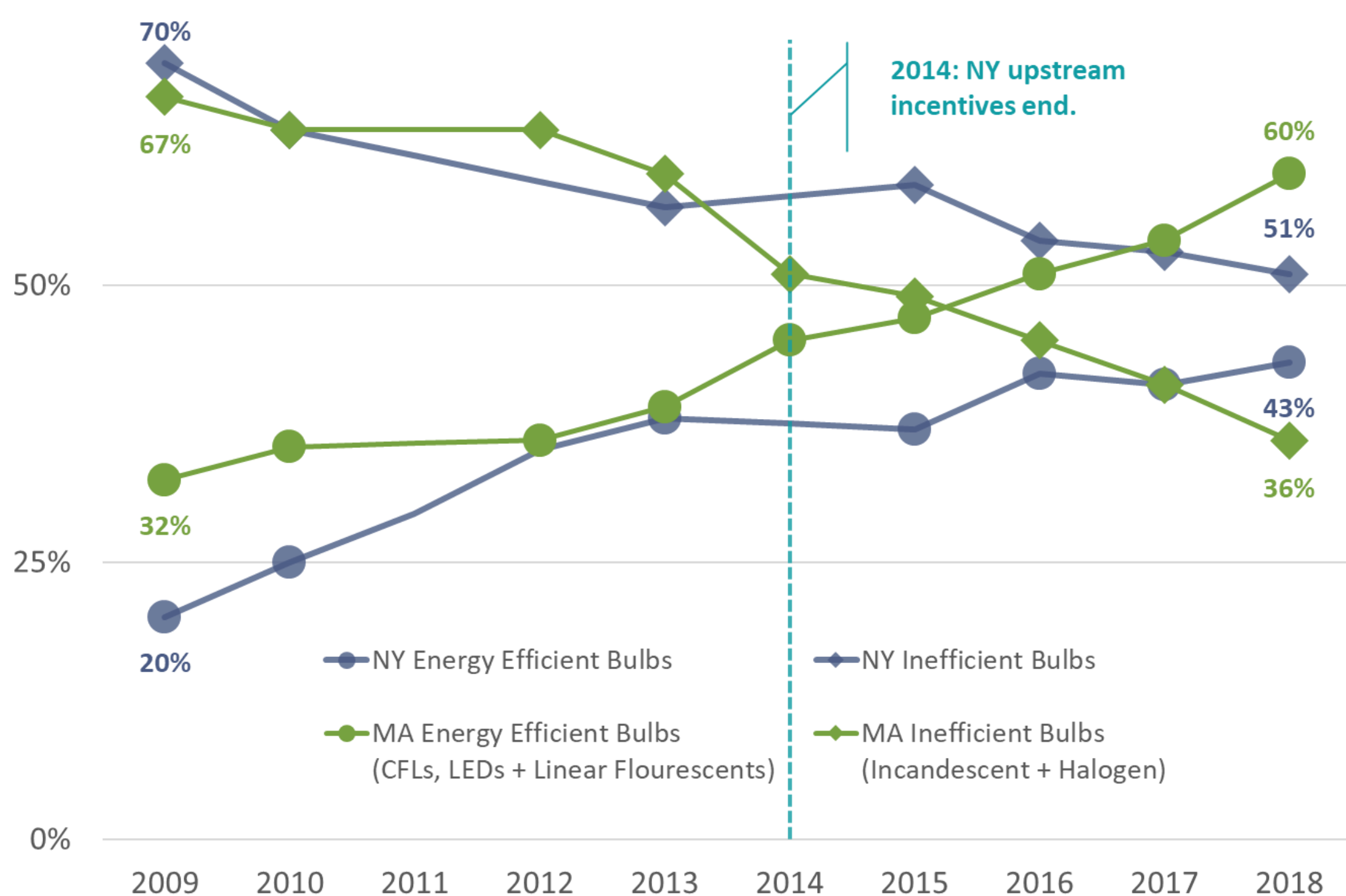
Program Effect

Is Massachusetts performing better than New York, a state that discontinued upstream incentives by 2014?

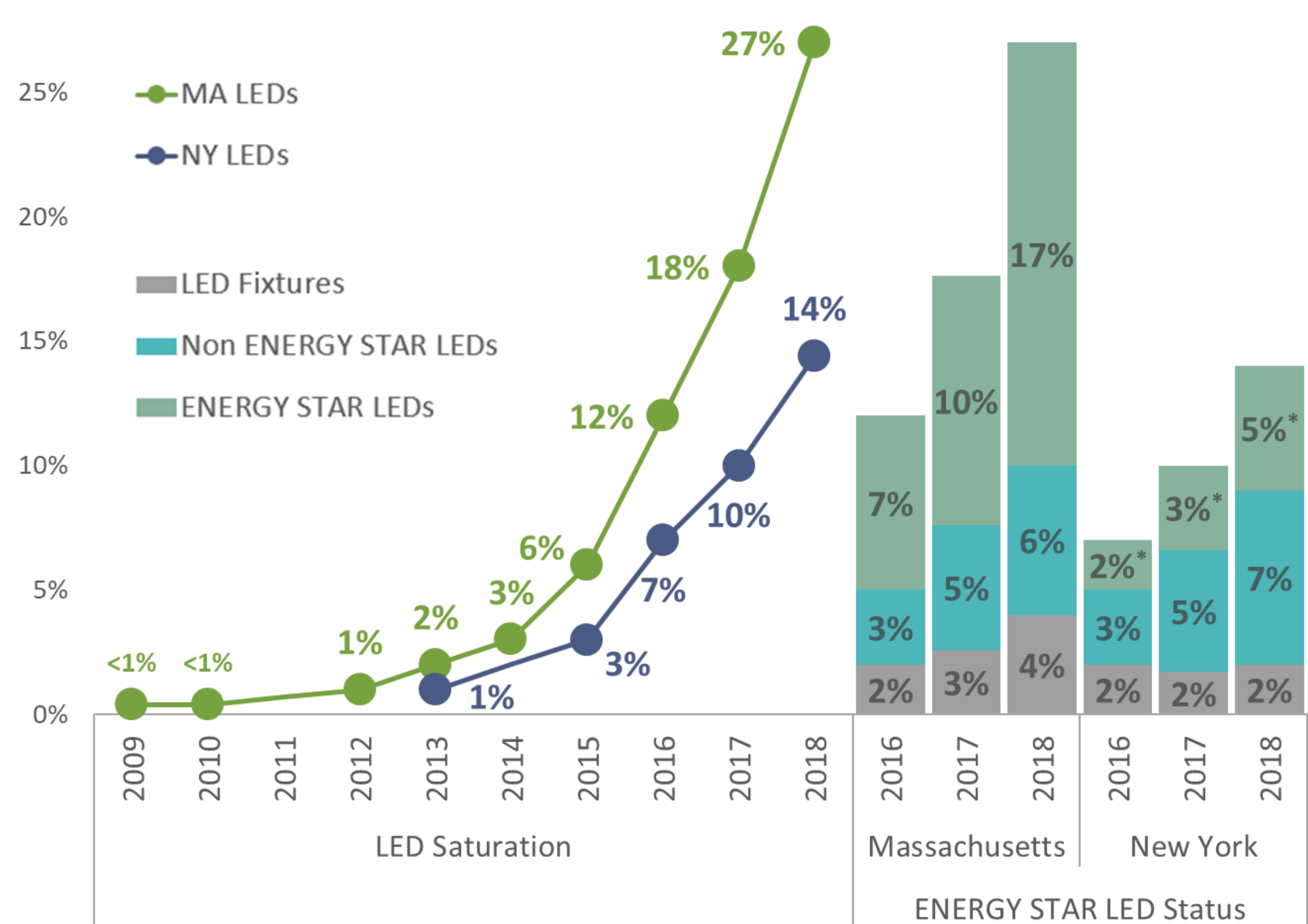
The MA program provides incentives that buydown the price of LEDs at retailers but also includes in-store signage, social media campaigns, in-store employee training, promotional events, advertisements, etc.

Efficient and inefficient saturation were similar in the two states before New York began to exit the upstream lighting market in 2014.

By 2018, energy efficient bulb saturation in MA had reached 60%; New York was only at 43%.



Saturation of ENERGY STAR LEDs in Massachusetts (17%) was more than three times the rate observed in New York (5%).



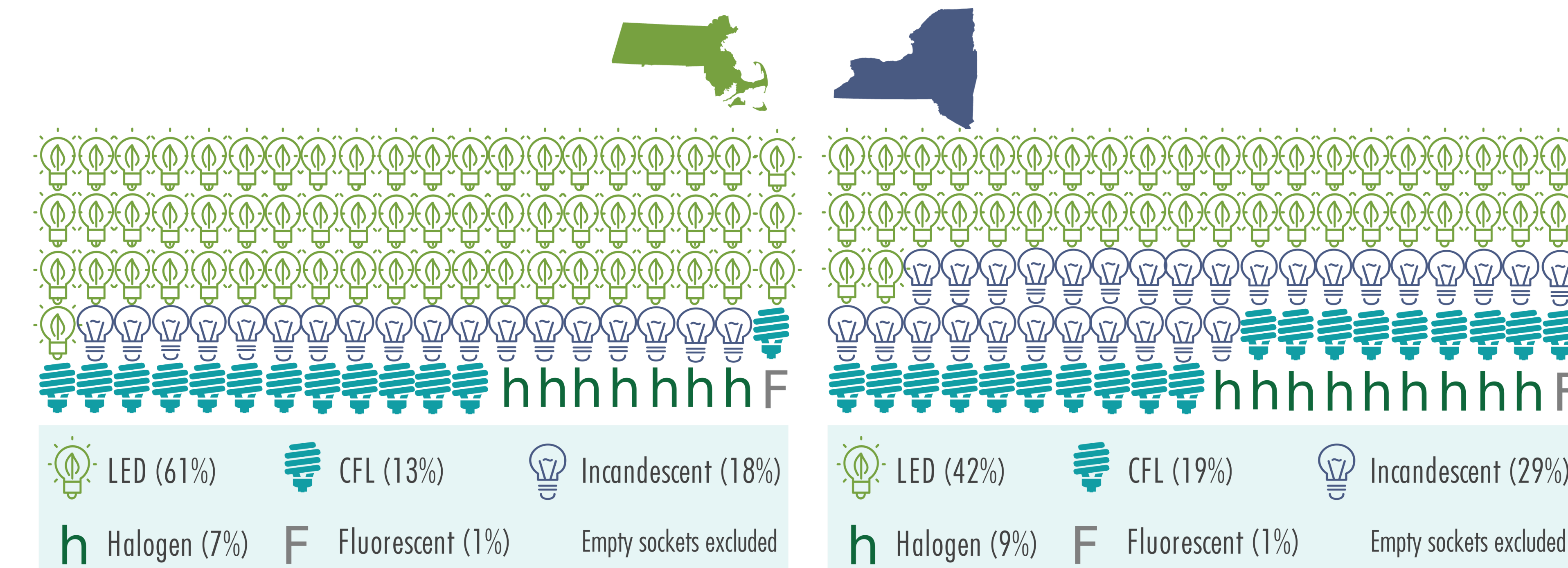
* Significantly different from the corresponding data in Massachusetts at the 90% confidence level.
§ Significantly different from 2016 at the 90% confidence level.

Lighting Technology Choices

What bulb types are people choosing to replace burned out bulbs or empty sockets?

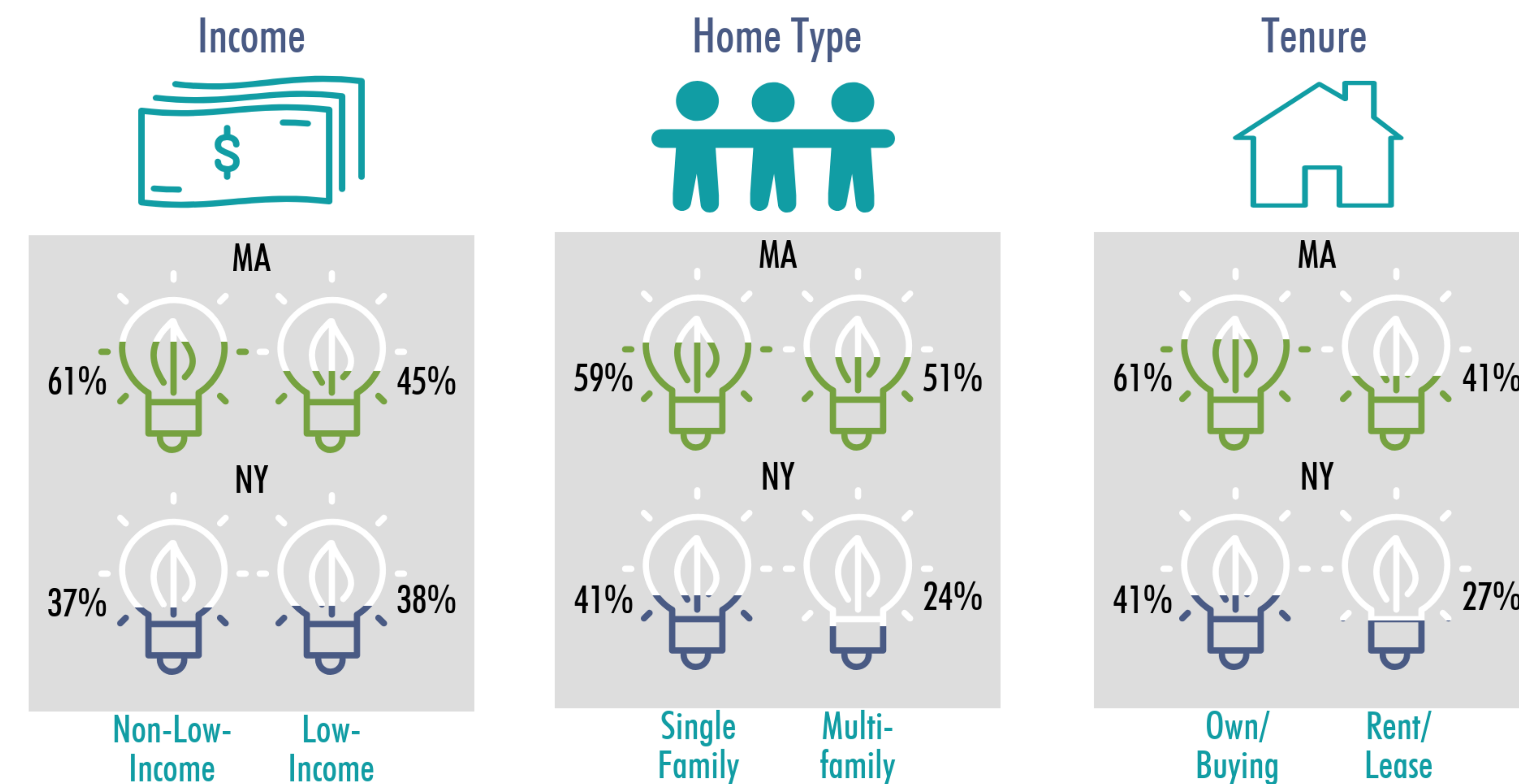
Newly Installed Replacement Bulbs (%) 2017-2018

LEDs were the most common replacement bulb in both states, but much of the difference is made up by incandescent bulbs in NY.



LED Replacement Bulbs by Demographics

MA & NY: Non-low-income, single-family, and homeowners were more likely to install replacement LEDs.
MA vs. NY: MA householders in these groups installed more replacement LEDs than their NY counterparts.



Data Sources

Where did we get this information?

InfoScout



- Nationwide panel of mobile app users uploading receipts; targeted recent lightbulb purchasers in MA and NY.
- 100 panelists in MA and 160 in NY.



On-Site Visits

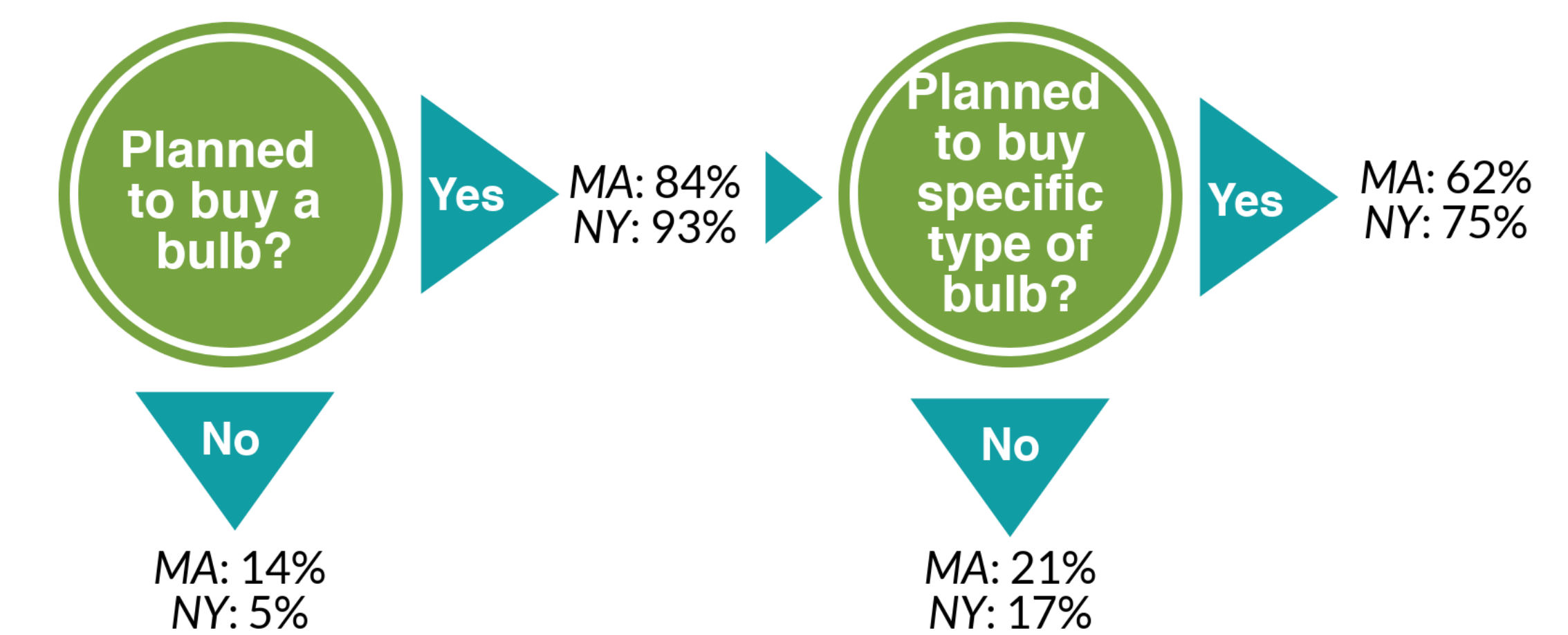
- On-site lighting inventories to households participating in a long-term series of on-site data collection.
- 381 households in MA and 217 in NY.

Purchasing Decisions

Why are people making these decisions?

Pre-Purchase Planning

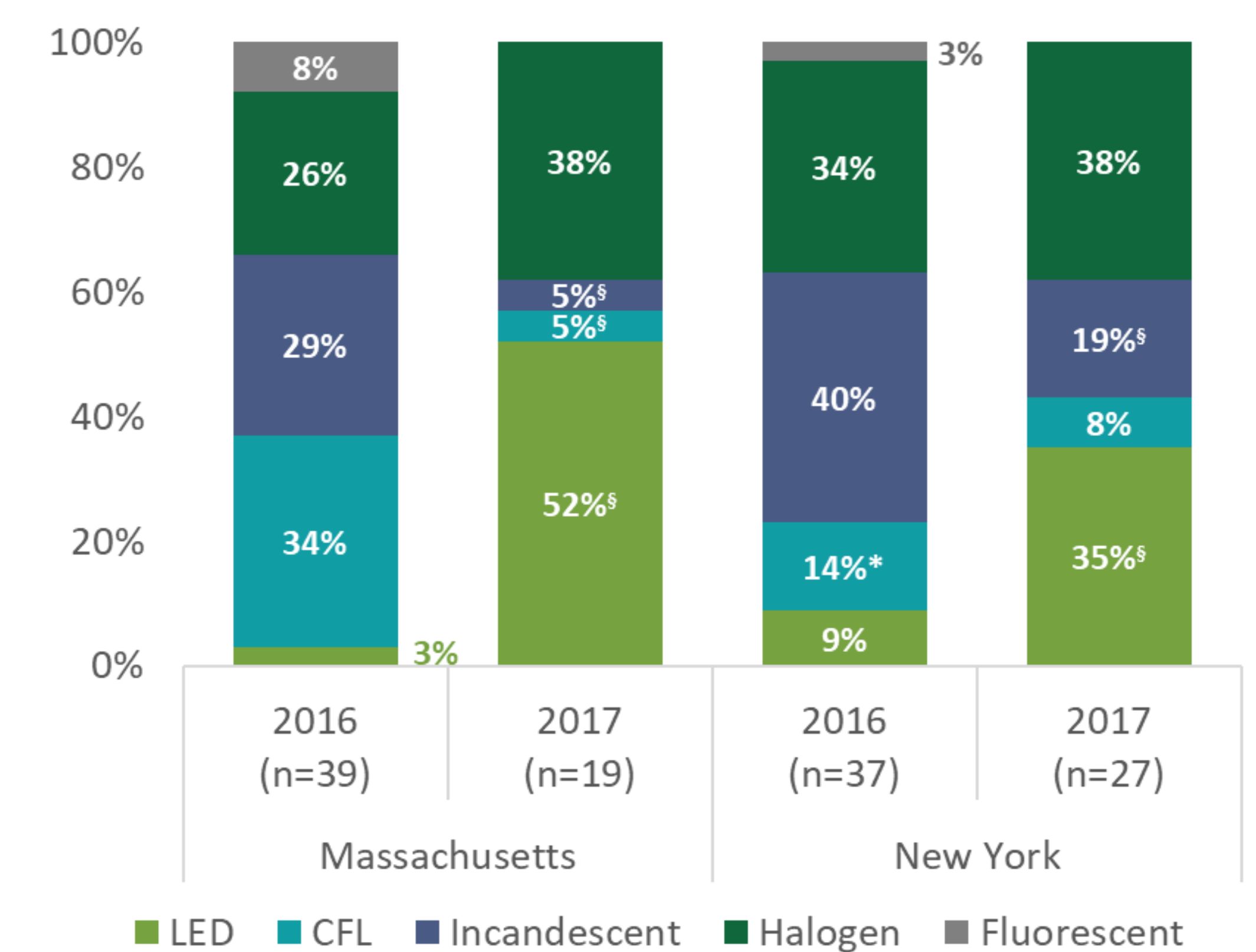
- The majority of lighting purchases were planned in advance.
- Purchasers also determined *which type of bulb* to purchase in advance.



* Respondents who answered "don't know" to questions about purchase planning are not displayed.

In-Store Decision Making

- Most common factor influencing bulb selection in both states: In-store signage!
- InfoScout panelists who decided what type of bulb to purchase while at the store were more likely to ultimately purchase an LED bulb than their 2016 counterparts.



Key Takeaways

What does this mean?

- The program is having an effect!
- LED adoption is also increasing through natural market adoption.
- Since most lighting purchases are planned, it is important to educate customers *before* they shop.