



Advanced Lighting Baseline Study

Phases 1 and 2



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1. Introduction

The purpose of the Advanced Lighting Baseline Study is to provide baseline data for key advanced lighting market indicators. These data will enable tracking of market progress during the 2010-2012 energy-efficiency program period and beyond.

The study involves two phases:

- **Phase 1**, which involves mining and analyzing available data from recent impact and process evaluation studies to yield information on retail store stocking and pricing of advanced lamps as well as the proportion of installed and stored lamps in California households that are advanced lamps; and
- **Phase 2**, which involves research into advanced lamp sales in California and the U.S. as a whole, non-residential installations in California, advanced lamp stocking outside of California, and a literature review of recent research conducted on advanced lamp markets outside of California.

The California Public Utilities Commission (CPUC) has provided approval for California’s investor-owned electric utilities (IOU) – Pacific Gas & Electric (PG&E), Southern California Edison (SCE), San Diego Gas & Electric (SDG&E) – to conduct both study phases. The study was designed to address the key baseline indicators shown in Table 1-1.

**Table 1-1
Advanced Lighting Baseline Study Baseline Indicators – Phases 1 and 2**

Residential Advanced Lighting Baseline Indicator	Data Source
Phase 1	
Availability, stocking of advanced lamps	2009 California shelf survey data
Estimated average prices for advanced lamps	2009 California shelf survey data
% of household sockets filled w/advanced lamps	2008-2009 socket inventory data
% of lamps in storage that are advanced lamps	2008-2009 socket inventory data
Phase 2	
% of 2008-2009 lamp sales for which advanced lamps account	2008-2009 ACNielsen, Activant data
Prices for advanced lamps (drug, grocery, hardware channels)	2008-2009 ACNielsen, Activant data
Availability, stocking of advanced lamps outside of California	Data from the 2010 California CFL Market Effects study
% of CFLs installed in small commercial applications that are advanced lamps	2006-2008 Upstream Nonresidential CFL Data

In this report, we provide results from both phases of the study (Phase 1 and Phase 2). The report begins with the definition of the term “advanced lighting” and the other various lamp categories used in the report, then moves into a discussion of the methods employed in analyzing data from the key data sources analyzed in support of this study. It then provides results on advanced lamp stocking, installation and pricing from both within California and outside of California. The memo closes with a summary of findings.

Appendix A provides additional details on the shelf survey findings. Appendix B provides a summary of a high-level level literature review conducted to assess whether any additional comparable non-California data are available for comparison with California data.