EDF Energy Lighting Study

Final report

- Prepared for: EDF Energy
- Prepared by: Synovate
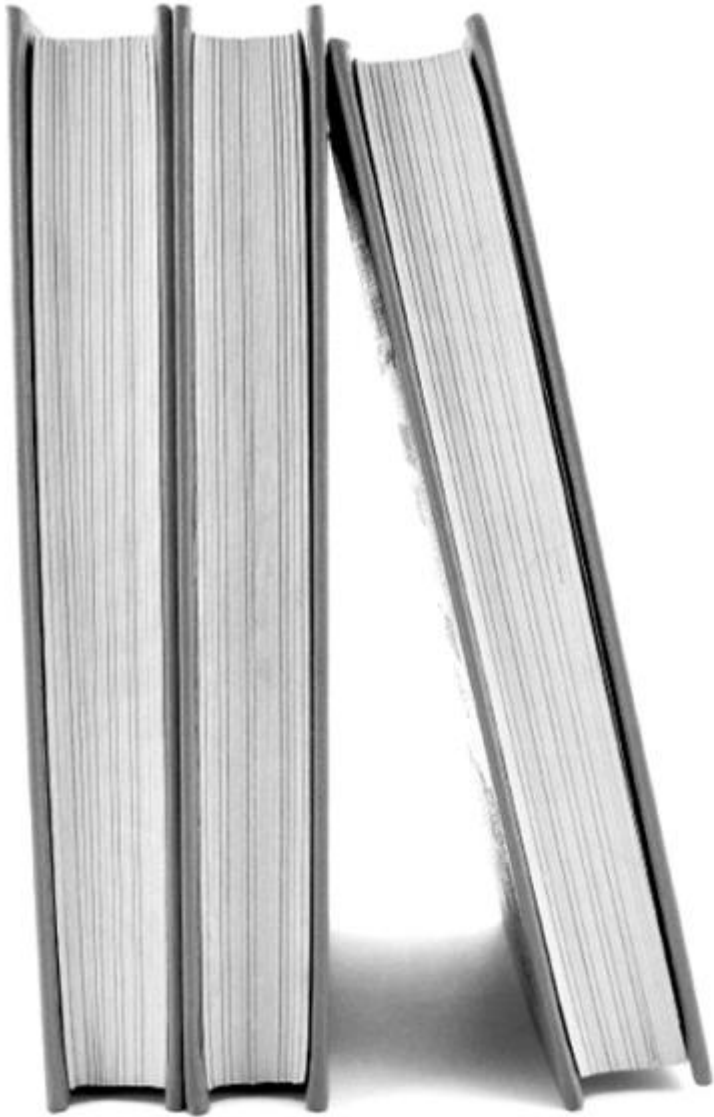
Contents:

- Background and research method

- Executive summary

- Detailed research findings
    1. How the Lemnis bulbs have been used
    2. Attitudes towards the Lemnis bulb
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Background and Research Method

Background & Research Method

- 5,000 new LED light bulbs were given to customers – Nov 2009 to Mar 2010
  - 3,000 through EDF Energy's field services
  - 2,000 through the London Warm Zone
  - The LED light bulbs handed out were all bayonet cap

- Customers were contacted by telephone at least 7 days after the new bulb was installed

- Customers from each group - EDF Energy field services and Warm Zone were interviewed

- The interviews lasted 10 minutes each

- The total number of interviews completed was 876

- No weighting was applied to the data

Notes on this document

Customers have been split by their demographic grouping

'Vulnerable' group:

- Low income and / or receiving state benefit, and are either elderly (70 years plus) or have young children (11 and under) in their household
- This group includes customers from the **London Warm Zone (LWZ)** and **Energy Field Services (EFS)**

Significant differences:

- Where differences exist between both they have been shown (at 95% level)
- Where no differences are specified none exist in the data and the total responses are shown

Priority group:

- The priority group as defined by Ofgem is counted separately and is recorded in the appendix section of the document

Executive Summary

Executive summary (1)

The bulbs have been fitted into areas of the home most likely to have high usage, and compatible fittings

- Almost all (96%) fitted their new bulb into an existing light fitting

- The bulbs are most likely to have been fitted into a ceiling pendent (81%), and are the main source of light (78%) which is consistent with the rooms in which the bulbs are being used:
  - 36% in the lounge/ living room
  - 27% in a hallway/ landing/ porch
  - 21% in a bedroom

- 45% have replaced a traditional GLS light bulb

- On average the bulbs were being used for 4.8 hours a day during the winter trial period (calculated 2.7 hours summer time)

Executive summary (2)

Like and Dislikes of the Lemnis bulb

68% have no spontaneous dislikes. 90% feel that the light is suitable

- Spontaneously the advantages are its energy saving (26%) and brightness (22%)

- When prompted more than three quarters agreed that:
  - (96%) the bulb is easy to fit
  - (90%) the colour of the light is suitable
  - (87%) it is quick to reach full brightness
  - (83%) it is an attractive shape and design
  - (78%) it is suitable for any home

- Only 5% feel the light is too orange, and 8% too yellow

- Amongst the 8% who feel the light is not suitable
  - 61% consider the light is too dim
  - 15% who agree the light is too orange or yellow, and 7% too bright

Executive summary (3)

Continued use, purchase intention and price point

The bulbs are liked by the majority of customers. This translates into a very high purchase consideration (before price)

- Almost all (93%) have a good opinion of the bulb, 62% consider it excellent or very good

- As a result 91% will continue using (before price) and 74% would consider purchasing more
  - 37% would definitely purchase

- However, after price (£23) is revealed this drops to only 19% who would consider purchase (8% definitely)
  - Optimum price is between £3 and £5

- Before price an average of 3.2 bulbs would be considered
  - 24% of considers buying 1 or 2 bulbs
  - 25% of considers buying 3 or 4 bulbs

- After price the average is 2.1 bulbs with 47% considering 1 or 2

Executive summary (4)

'Vulnerable' group

This group share the same positive overall opinions

- This group have no measured dislikes about the new bulb

- However, there are some differences in their specific behaviours
  - More (42% vs. 34%) have fitted the bulb in their lounge/ living room
  - More (46% vs. 54%) used the bulb for less hours in the winter

- Potentially trend towards shorter periods of usage
  - 46% currently using the light for 0-4 hours is significantly lower than the 'vulnerable' group (54%)
  - But the average hours of usage do not different significantly

Detailed Findings

1. How the Lemnis bulbs have been used

Over a third of users fitted their bulb in a high usage area - the lounge
This is especially true among the most Vulnerable group

Room where light bulb has been used

Room	%
Lounge	36%
Hallway/Landing/Porch	27%
Bedroom	21%
Kitchen	7%
Bathroom	3%
Dining room	3%
Utility room	1%
Study	1%
Other	2%

42% ⬆

of the' Vulnerable' Group placed the bulb in the lounge
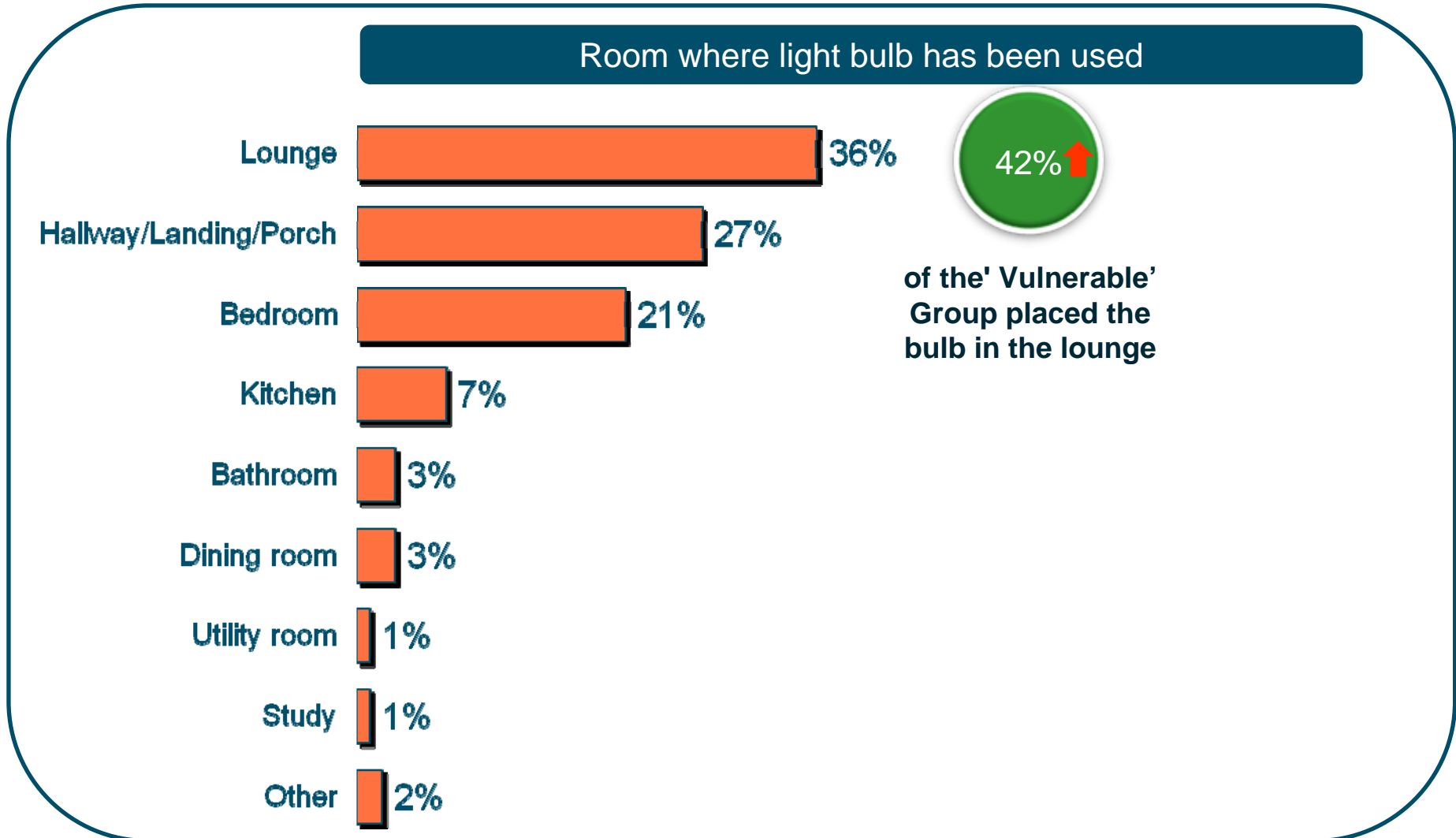
Q1 Which room in your home have you fitted the new light bulb?
Base: All (n=876)

Consistent with the most common room of use the majority have fitted the bulb in an existing ceiling pendent

Type of light fitting light bulb has been fitted in

Ceiling pendant	81%
Table lamp	12%
Wall mounted lamp	3%
Floor based lamp	2%
Desk lamp	1%

96%

Have fitted the bulb in an existing light fitting
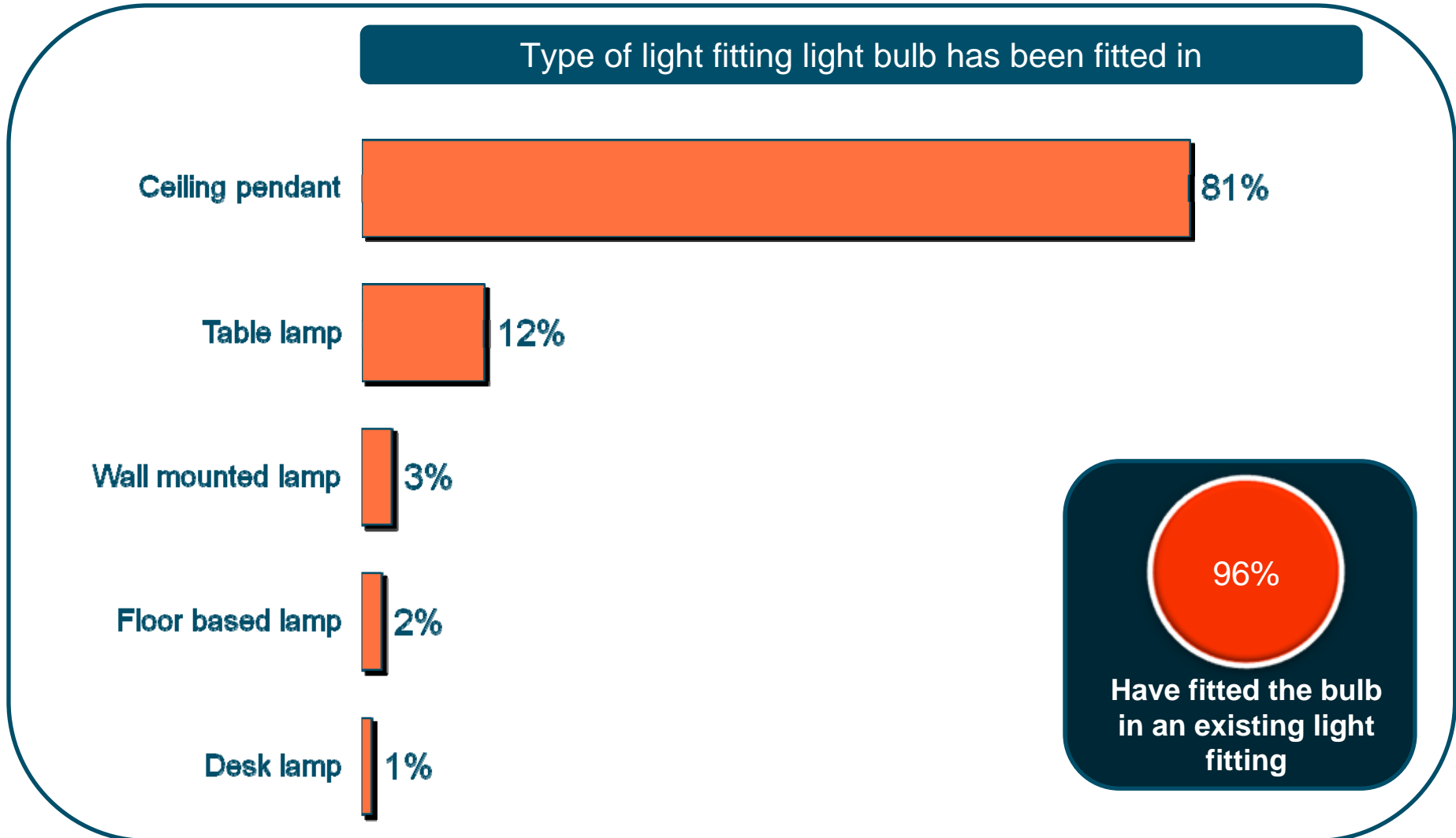
Q2 And what type of light fitting have you fitted the new light bulb in?   Q2b Did you fit the light bulb in an additional light fitting vs, existing light source?
Base: All (n=876)

51% have replaced another type of energy saving bulb and 45% are replacing a standard bulb

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Type of light bulb that has been replaced

4% Don't know

A traditional GLS Light bulb
45%

An Energy Saving Light bulb with a stick shape
34%

An Energy Saving Light bulb with another shape
17%

43% have mainly energy saving bulbs in their house, highest amongst priority groups

28%
Replaced ES light t bulb with another shape (placed through LWZ)

15%
Replaced ES light t bulb with another shape (placed through EFS)

Q3 What type of light bulb did you replace the bulb with? Q_bulb_type
Base: Those who have substituted   (n=842)

Average Wattage of the replaced light bulb 52.7W

Wattage of bulb that has been replaced

Category	Percentage
5-11 Watts	8%
12-19 Watts	3%
20 Watts	2%
23-39 Watts	1%
40 Watts	12%
60 Watts	38%
100 Watts	9%
Other	3%
Don't know	25%
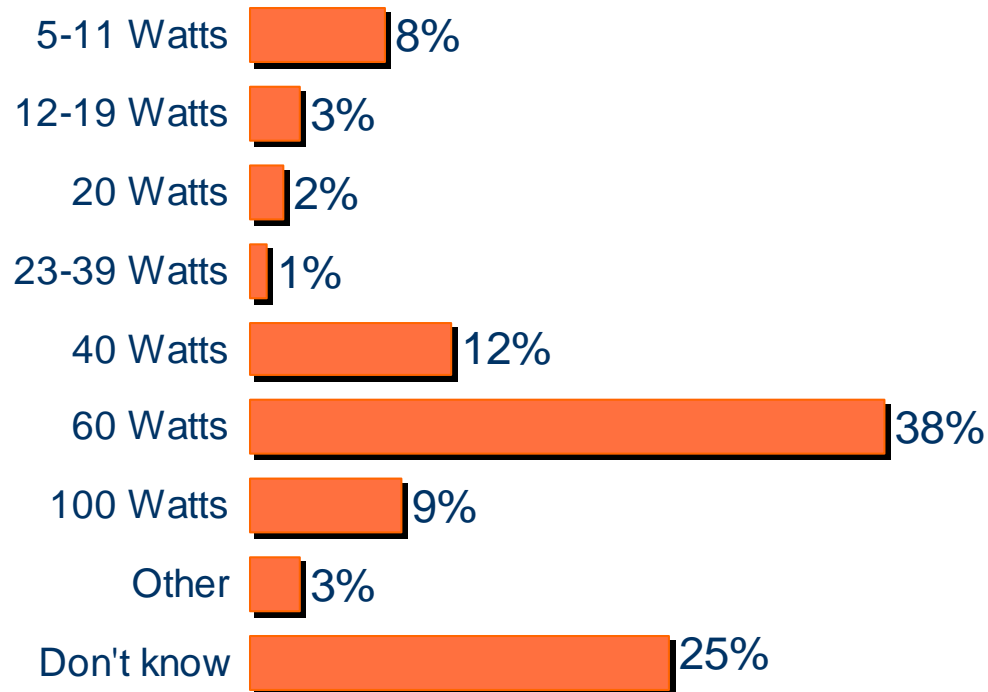
Q4 And what was the wattage of the light bulb you replaced?
Base: Those who know what was substituted   (n=578)

Again, consistent with the most common room of use the majority are using the light as the main light for the room

Purposes the light has been used for

Main light for the room	78%
For reading	22%
Background lighting	20%
For security	19%
Light up the hallway	1%
For watching TV	1%
For children playing	1%
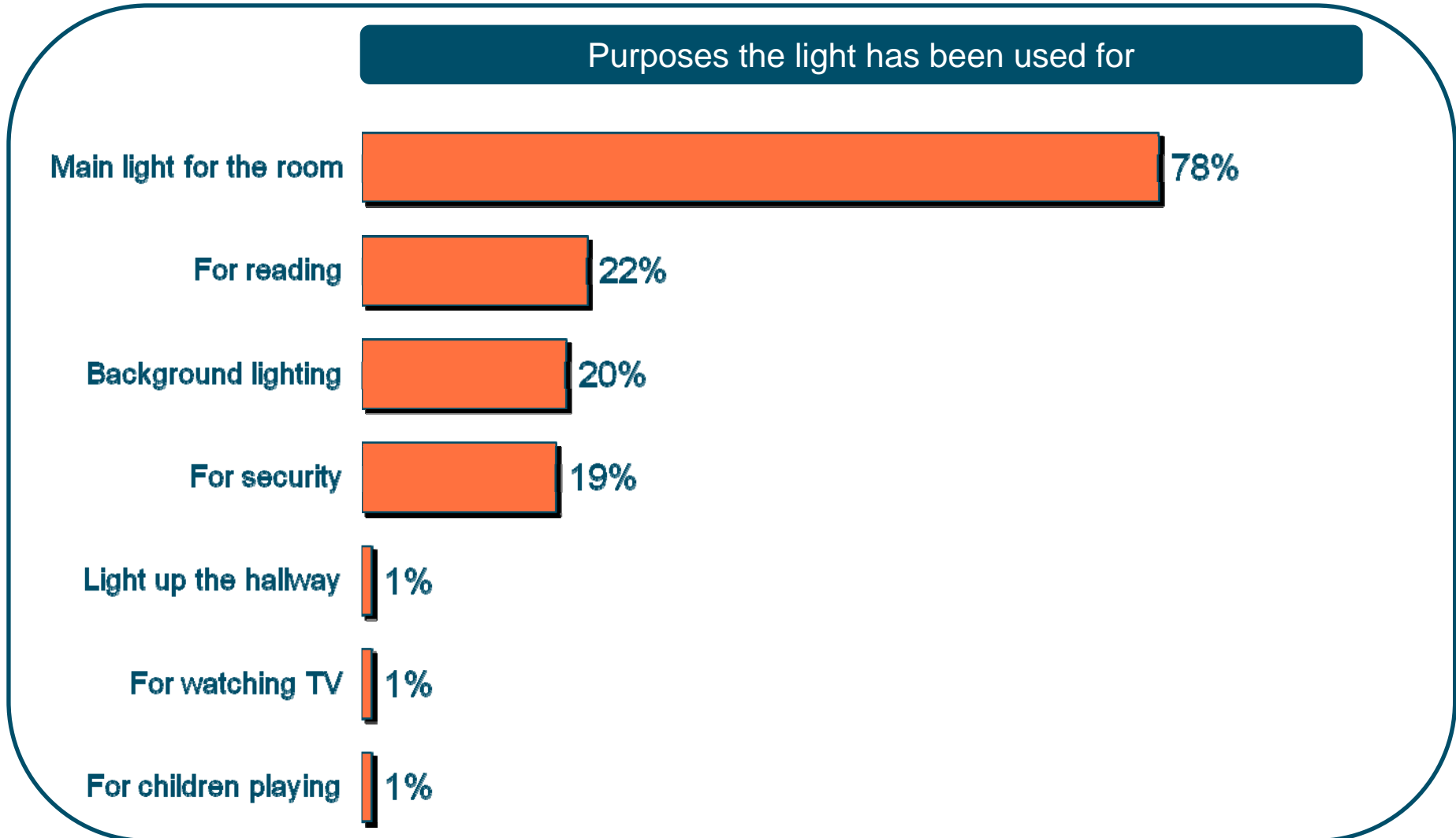
Q5 Thinking about where you fitted the new light bulb, for what purposes have you used the light?
Base: All (n=876)

On average the new bulbs are used 4.8 hours per day (winter)

The vulnerable group are more likely to use the bulb for shorter periods

Winter hours of use

2% Don't know

0-4 hours — 52%
5-9 hours — 37%
10-14 hours — 7%
15-19 hours — 1%
20+ hours — 1%

46%
'Vulnerable'
(0-4 hours)

54%
Non 'Vulnerable'
(0-4 hours)

(Total) Mean
4.8
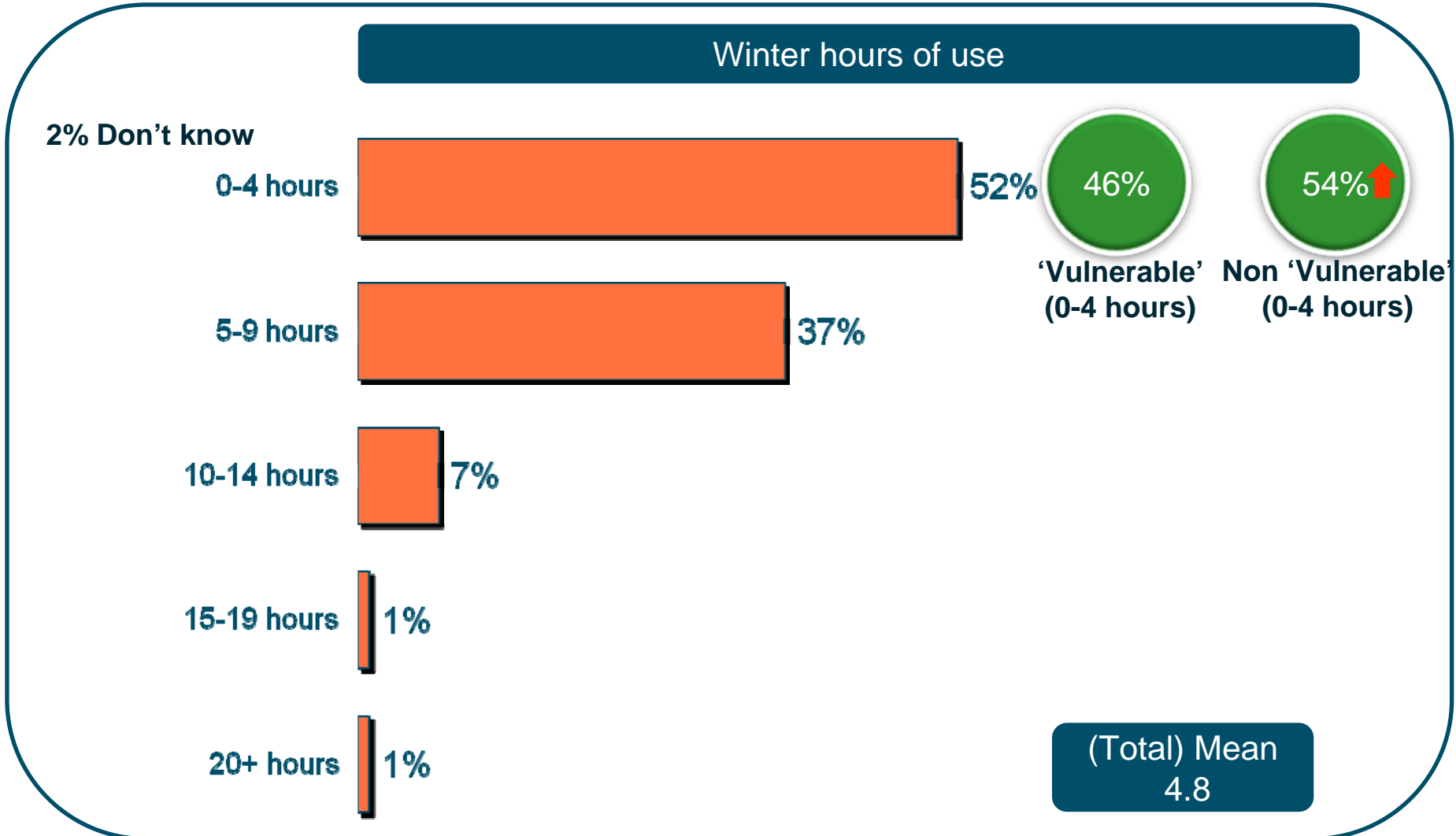
Q6 On average, how many hours a day do you use the light that the new bulb is fitted in at the moment?
Base: All (n=876)

On average the new bulbs are used 2.7 hours per day in the Summer

Summer hours of usage

2% Don't know

- 0-4 hours: 82%
- 5-9 hours: 11%
- 10-14 hours: 2%
- 15-19 hours: 0%
- 20+ hours: 0%

(Total) Mean 2.7
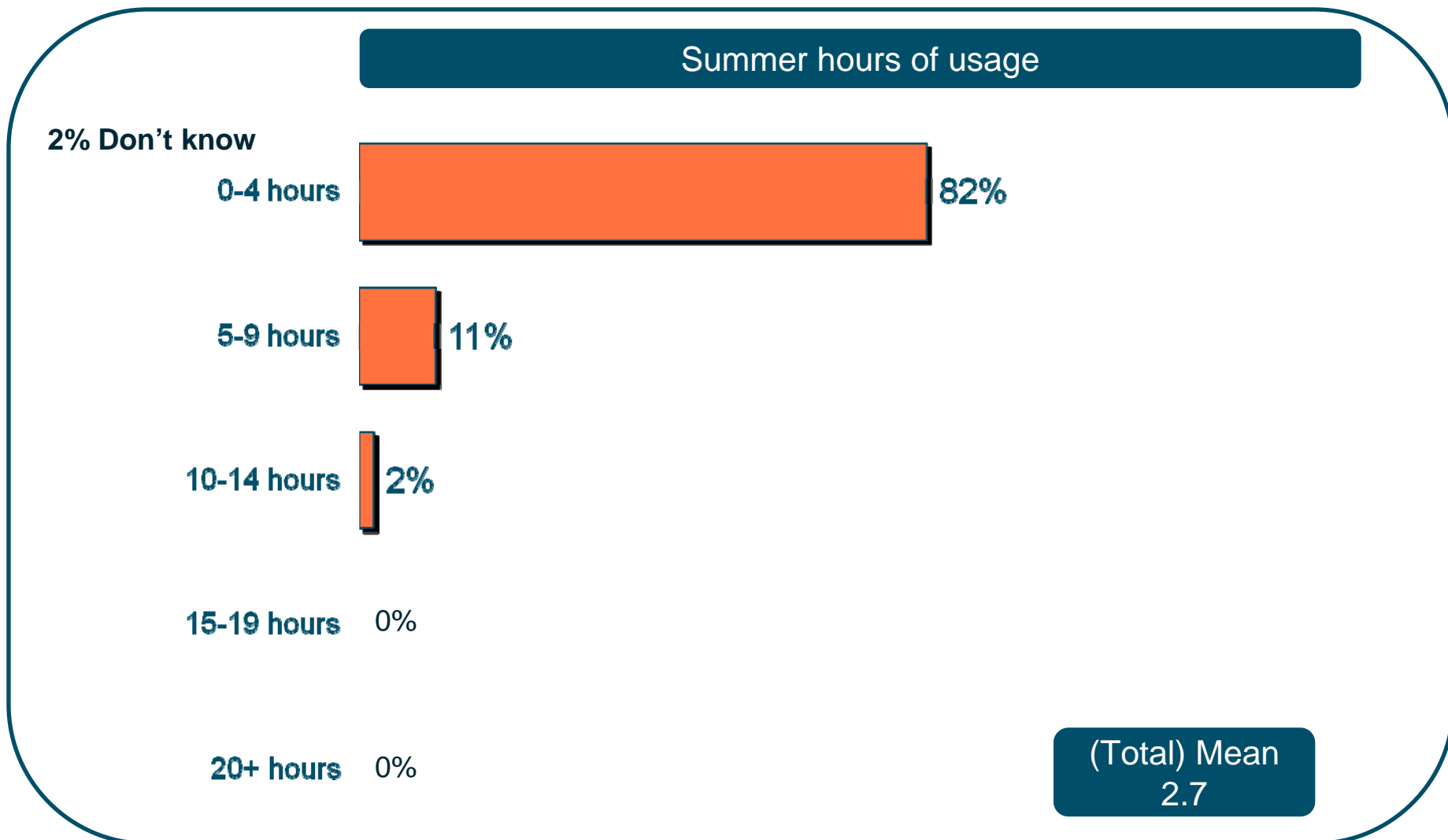
Q7 On average, how many hours a day do you think you would use the light during the summer?
Base: All (n=876)

2. Attitudes towards the Lemnis bulb

The majority have a good opinion of the bulb and will continue using

Three quarters would consider purchase, before price is stated, only 19% after price is revealed

Overall opinion and consideration

% positive

- 93%
- 91%
- 74%
- 19%

Legend: ■ Excellent ■ Very good ■ Good ■ Poor ■ Very poor ■ Don't know

Overall opinion: 32% | 30% | 32%

Legend: ■ Definitely ■ Probably ■ Might/not ■ Probably not ■ Definitely not ■ Don't know

Continue using: 72% | 19% | 4%

Liklihood to buy (no price): 37% | 36% | 13% | 6%
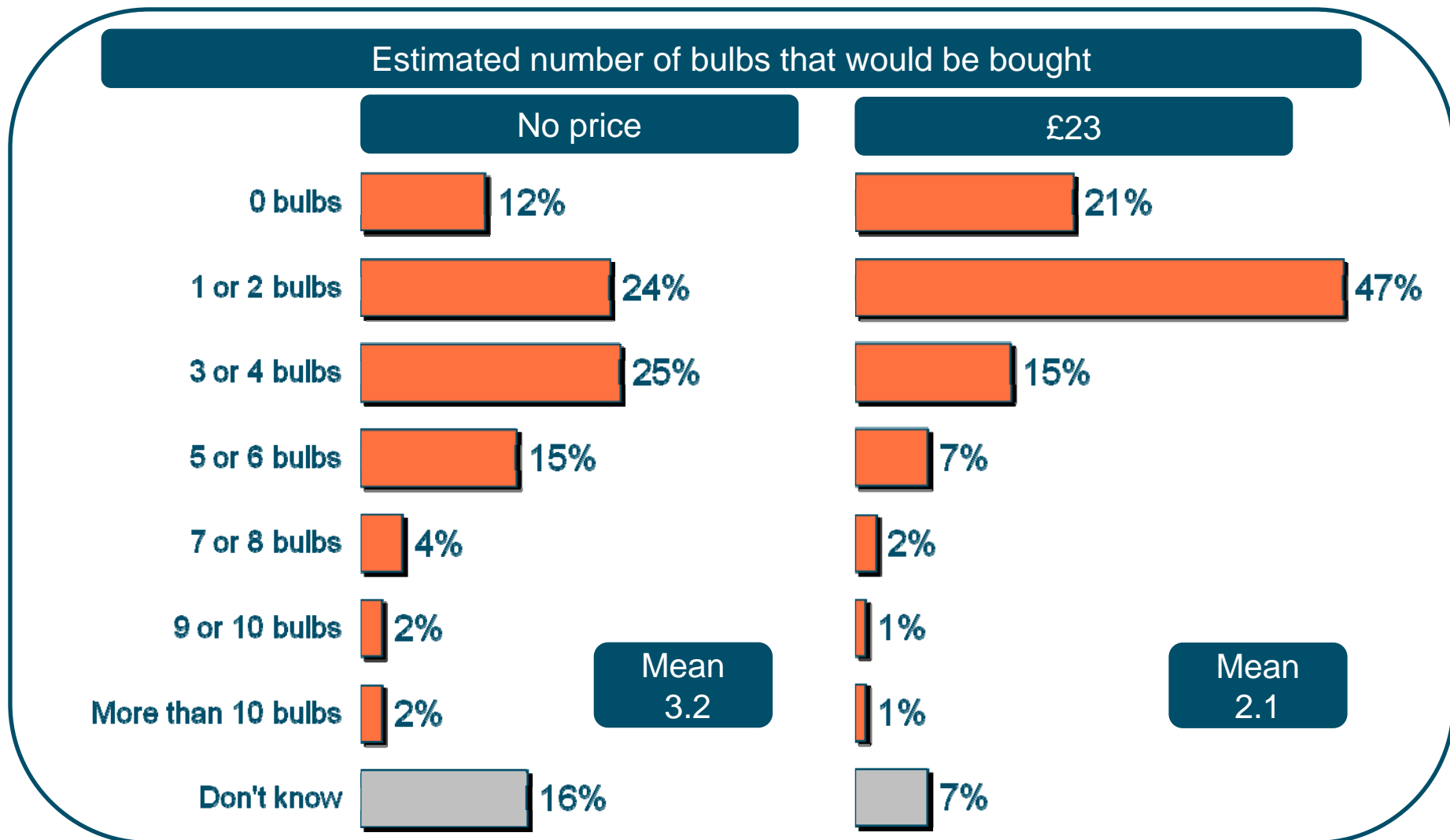
Liklihood to buy (£23): 8% | 11% | 15% | 17% | 48%

Q8 What is your overall opinion of the bulb? Q7b How likely is it that you will continue using the bulb you have been trialing? Q9 Considering the new bulb would be available at an acceptable price, how likely would you be to buy the new bulb? Q16 How likely…if it was priced at £23?

Base: All (n=876)

Those that would consider purchase, on average, will purchase 3.2 bulbs in the next 12 months, but only 2.1 at £23

Estimated number of bulbs that would be bought

	No price	£23
0 bulbs	12%	21%
1 or 2 bulbs	24%	47%
3 or 4 bulbs	25%	15%
5 or 6 bulbs	15%	7%
7 or 8 bulbs	4%	2%
9 or 10 bulbs	2%	1%
More than 10 bulbs	2%	1%
Don't know	16%	7%

Mean 3.2

Mean 2.1

Q10 And how many of the new bulbs would you buy in the next 12 months? Q17 … how many in the next 12 months if priced at £23?
Base: Those who would consider purchase (n=755), Those who would consider purchase at £23 (n=252)

As with the current bulb, additional bulbs are most likely to be in ceiling pendants, though almost a quarter will use them in table lamps

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Type of light fitting additional bulbs may be fitted in

Type	Percentage
Ceiling pendant	90%
Table lamp	23%
Floor based lamp	12%
Wall mounted lamp	11%
Desk lamp	8%
Living room side light	1%
Don't know	1%
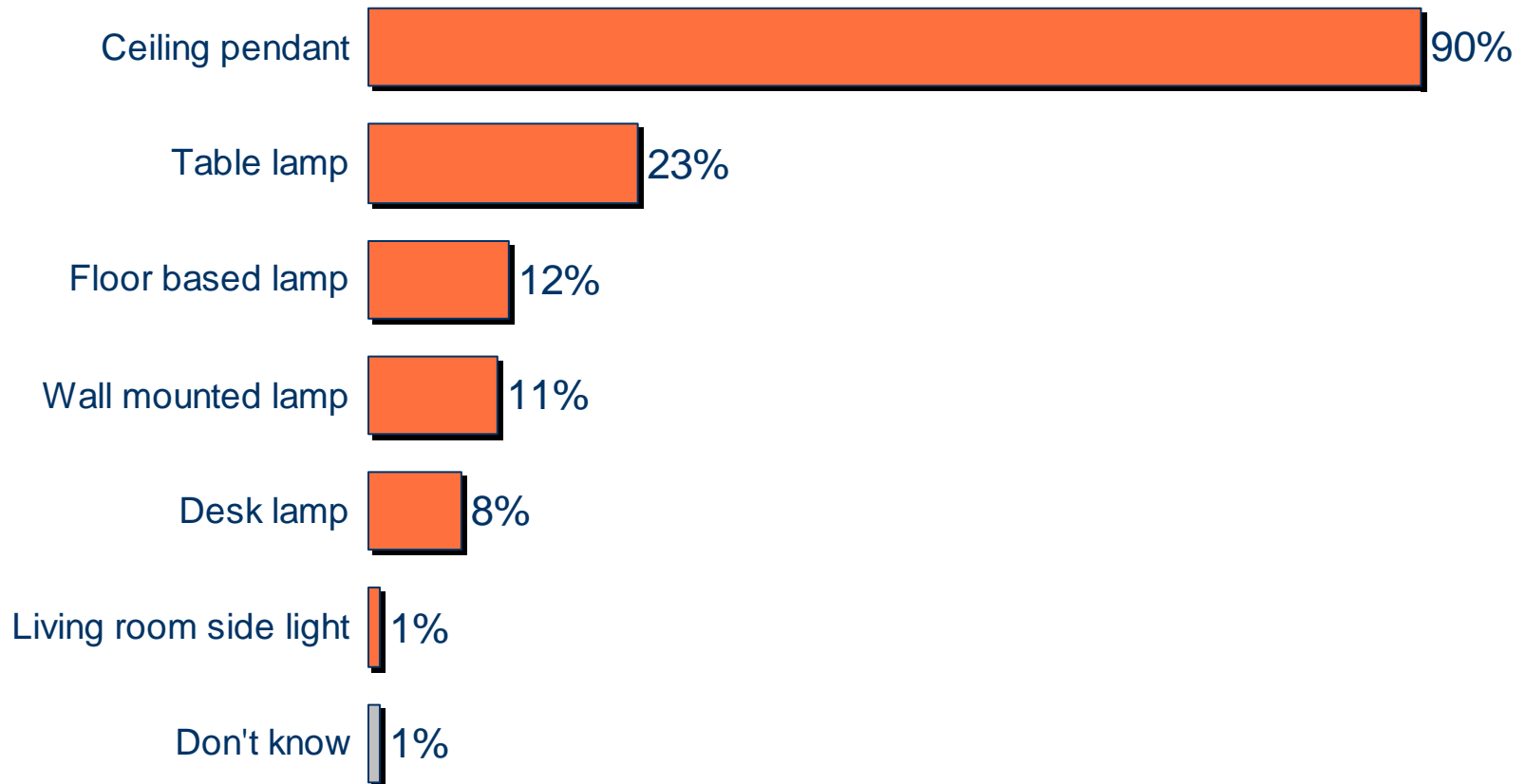
Q11 And in what types of light fitting would you fit the new bulbs that you would buy?
Base: Those who would purchase at least 1 bulb (n=541)

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The energy saving and brightness of the bulbs are most liked

Likes of the new bulb

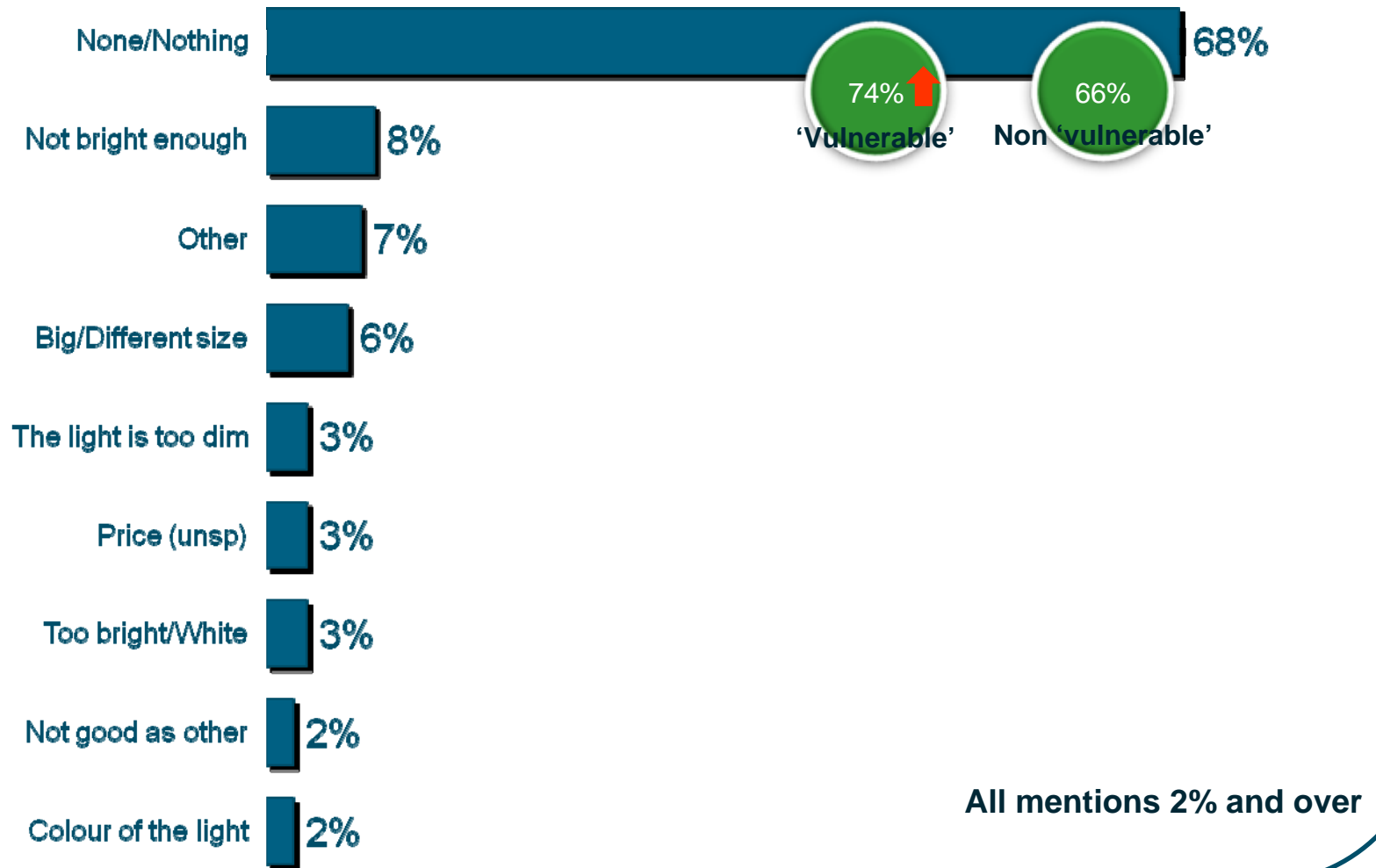| Category	Percentage
Saving energy	26%
Brightness	22%
Like the Shape/Size/Design	17%
Light comes instantly	16%
Long lasting	14%
Like the colour/appearance/Style	10%
Good/Like it (generally)	10%
Brighter than other bulbs	9%
Clear/clean/nice light	8%
Does not get hot/warm as other bulbs	7%
Better/Different than other bulbs	6%
Lights up quickly	6%
Not too Bright	6%
Others	5%
Similar to others	5%
Saves money	5%

'Vulnerable' 22% Non 'vulnerable' 15%

LWZ 16% EFS 9%

LWZ 14% EFS 7%

LWZ 2% EFS 8%

All mentions 5% and over

Q12 Please tell me what you particularly like about the light bulb you have trialed?
Base: All (n=876)

Two thirds have no dislikes, those that do cite the light being not bright enough or too dim as the key dislike

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Dislikes of the new bulb

None/Nothing ████████████████████████ **68%**

74% ⬆ 66%
'Vulnerable' **Non 'vulnerable'**

Not bright enough ██ **8%**

Other ██ **7%**

Big/Different size ██ **6%**

The light is too dim █ **3%**

Price (unsp) █ **3%**

Too bright/White █ **3%**

Not good as other █ **2%**

Colour of the light █ **2%**
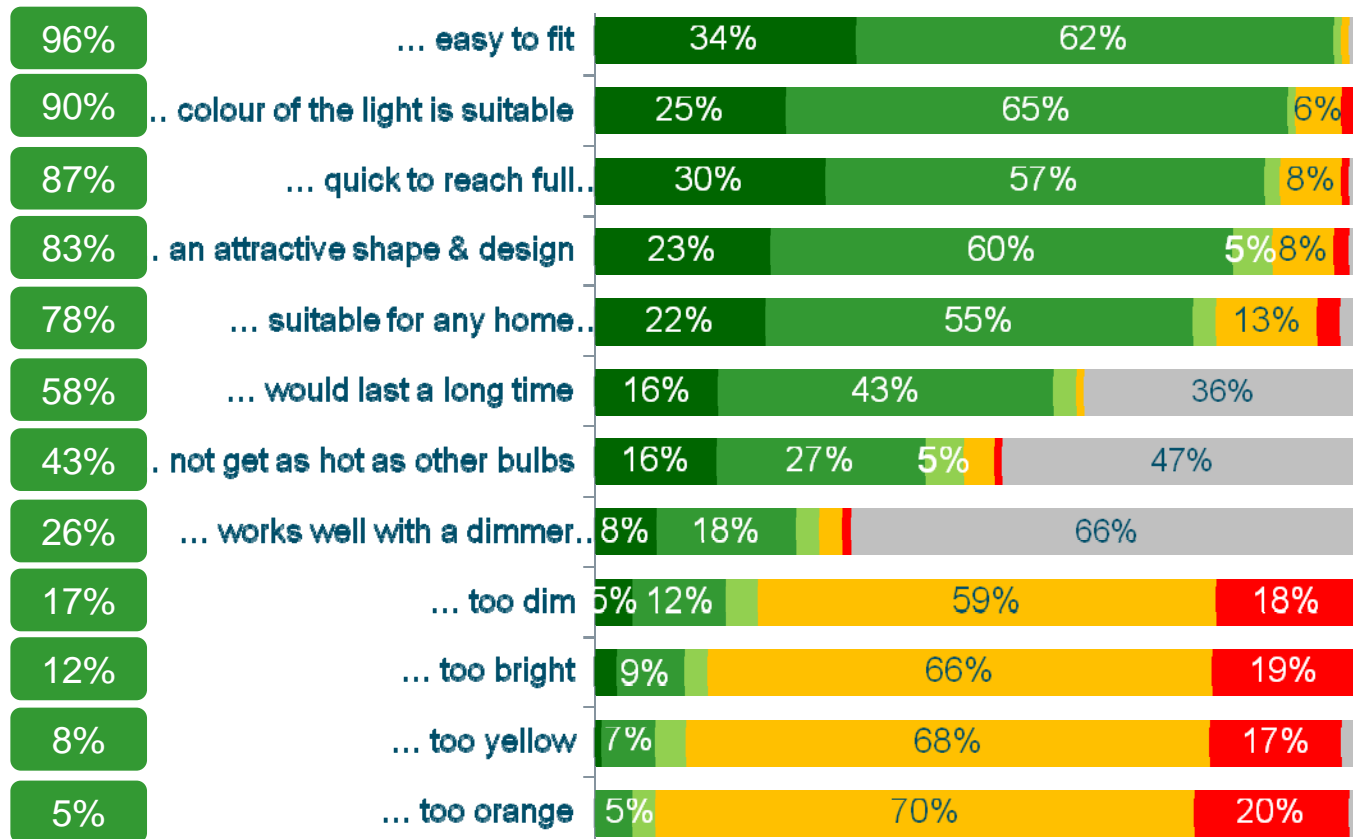
All mentions 2% and over

Q13 Please tell me what you particularly like about the light bulb you have trialed?
Base: All (n=876)

The majority believe the bulb is easy to fit and the colour of the light is suitable

Overall opinion and consideration

% agree

Legend: ■ Strongly agree ■ Agree ■ Neither/nor ■ Disagree ■ Strongly disagree ■ Don't know

% agree	Statement	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
96%	… easy to fit	34%	62%			
90%	.. colour of the light is suitable	25%	65%		6%	
87%	… quick to reach full..	30%	57%	8%		
83%	. an attractive shape & design	23%	60%	5%	8%	
78%	… suitable for any home..	22%	55%	13%		
58%	… would last a long time	16%	43%			36%
43%	. not get as hot as other bulbs	16%	27%	5%		47%
26%	… works well with a dimmer..	8%	18%			66%
17%	… too dim	5% 12%		59%	18%	
12%	… too bright	9%		66%	19%	
8%	… too yellow	7%		68%	17%	
5%	… too orange	5%		70%	20%	

Q14 I'd like you to tell me how much you agree or disagree with the following…?
Base: All (n=876)

3. Price estimates

Total Sample

Price estimates
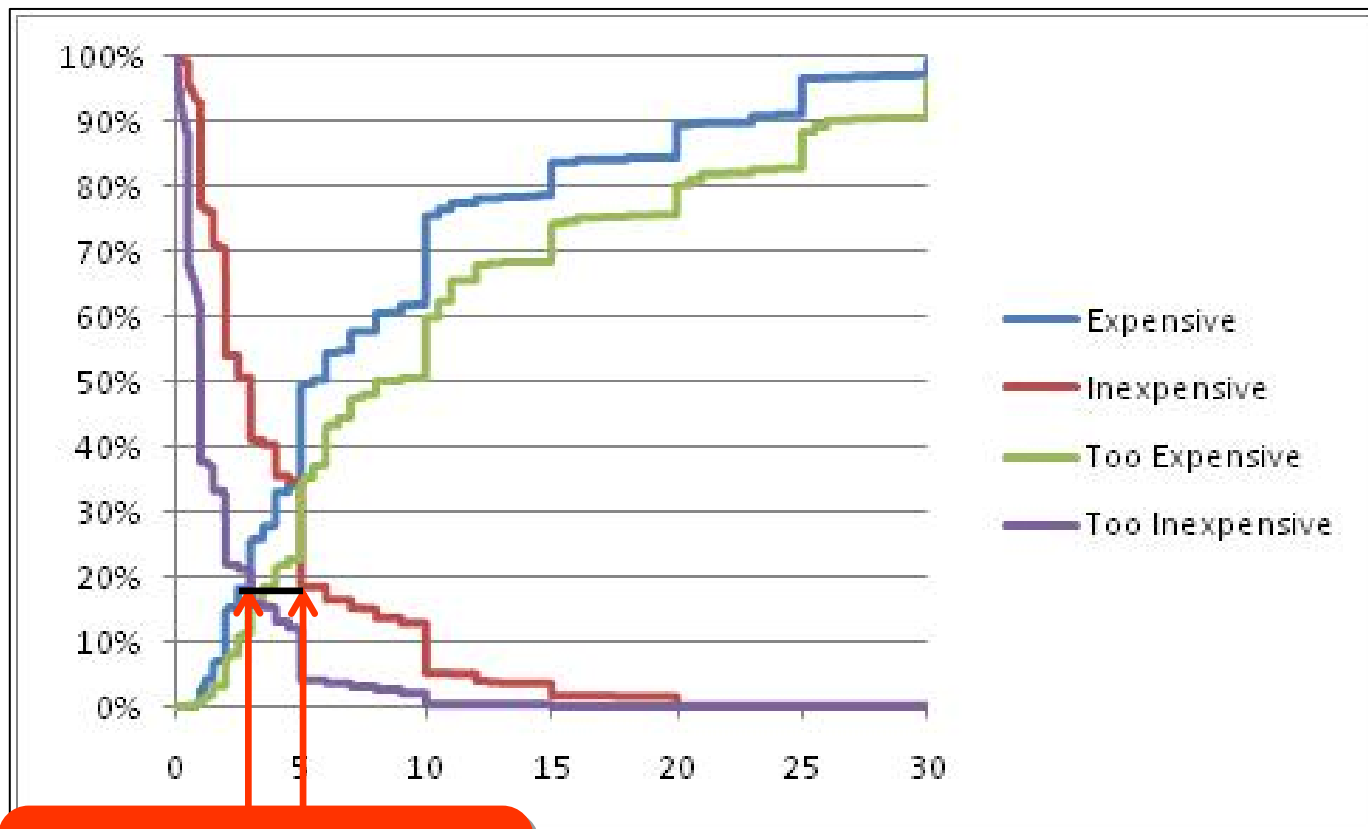
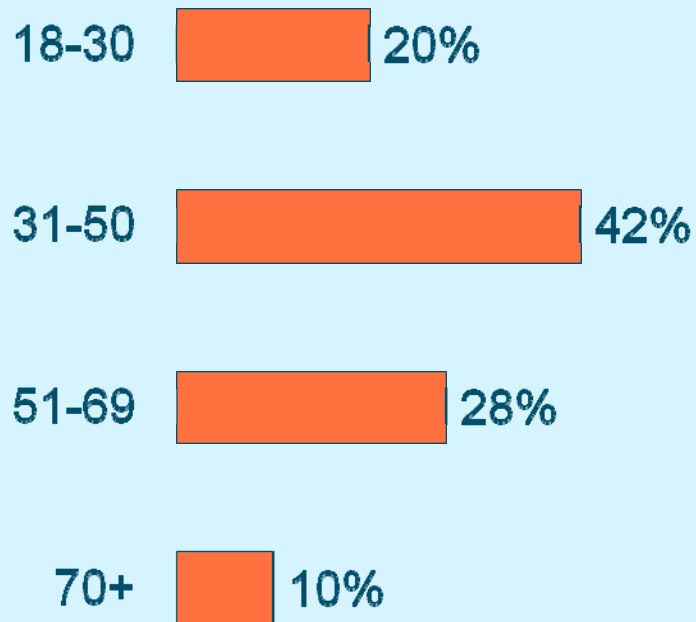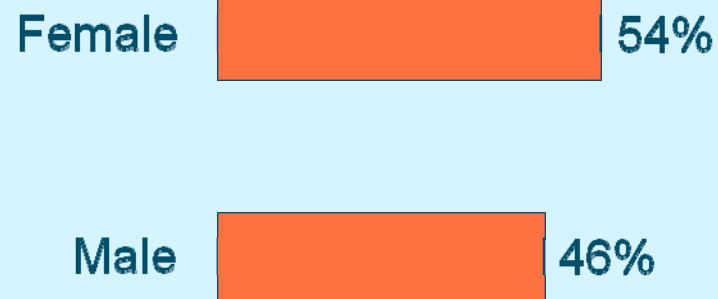Acceptable Price Range:
£2.99 - £5.00

Optimum Price Point:
£ 3.01

Q15 Pricing exercise
Base: All (n=876)

Appendix
Demographics

Age & Gender
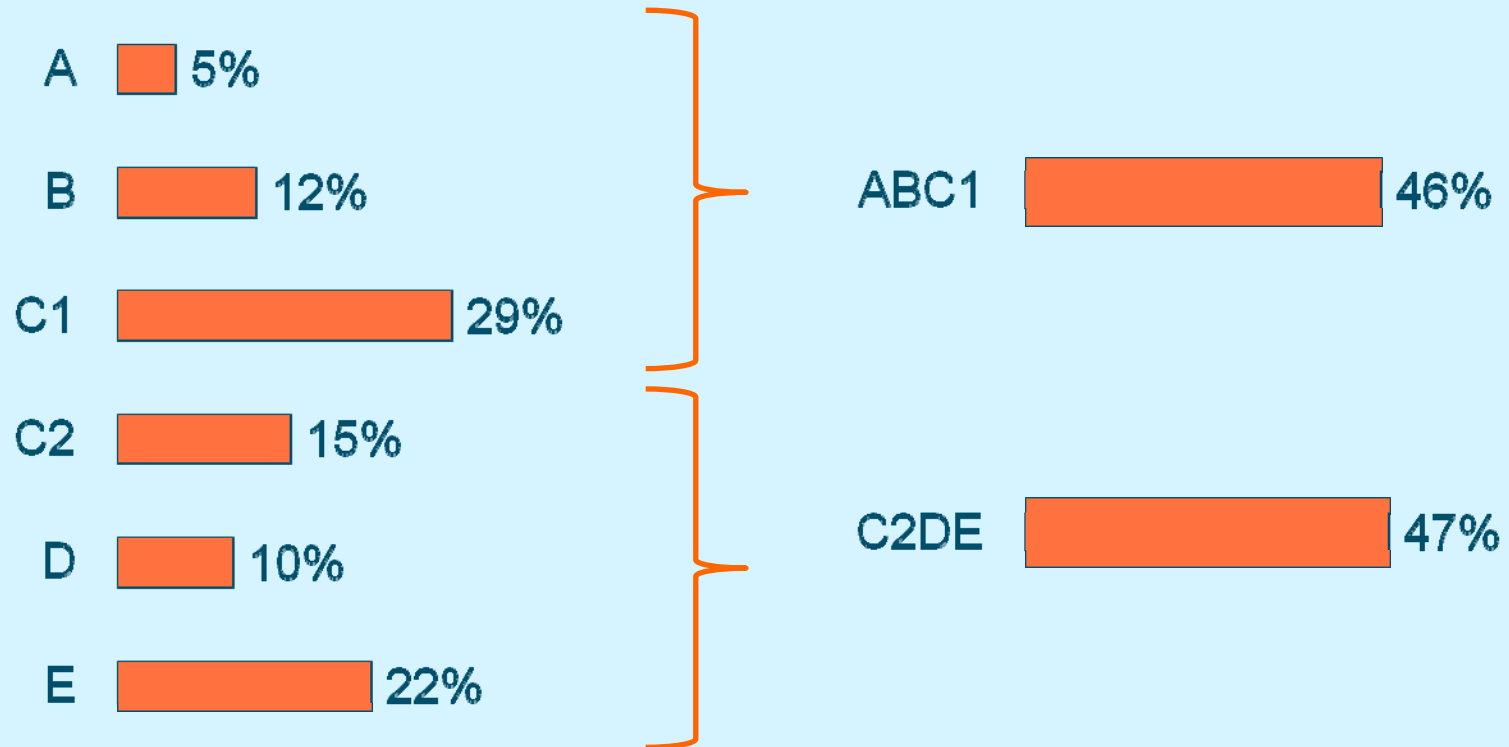
Social Grade

Source: Q_Social Grade
Base: Total Respondents (n=876)

Household Income

Income	
No Income	3%
Less than £27,000	47%
£27,000 - below £55,000	18%
£55,000 - below £70,000	3%
£70,000 – below £85,000	2%
£100,000 – below £125,000	1%
£85,000 – below £100,000	2%
£100,000 – below £125,000	1%
Over £125,000	1%

More than £27,000 — 25%
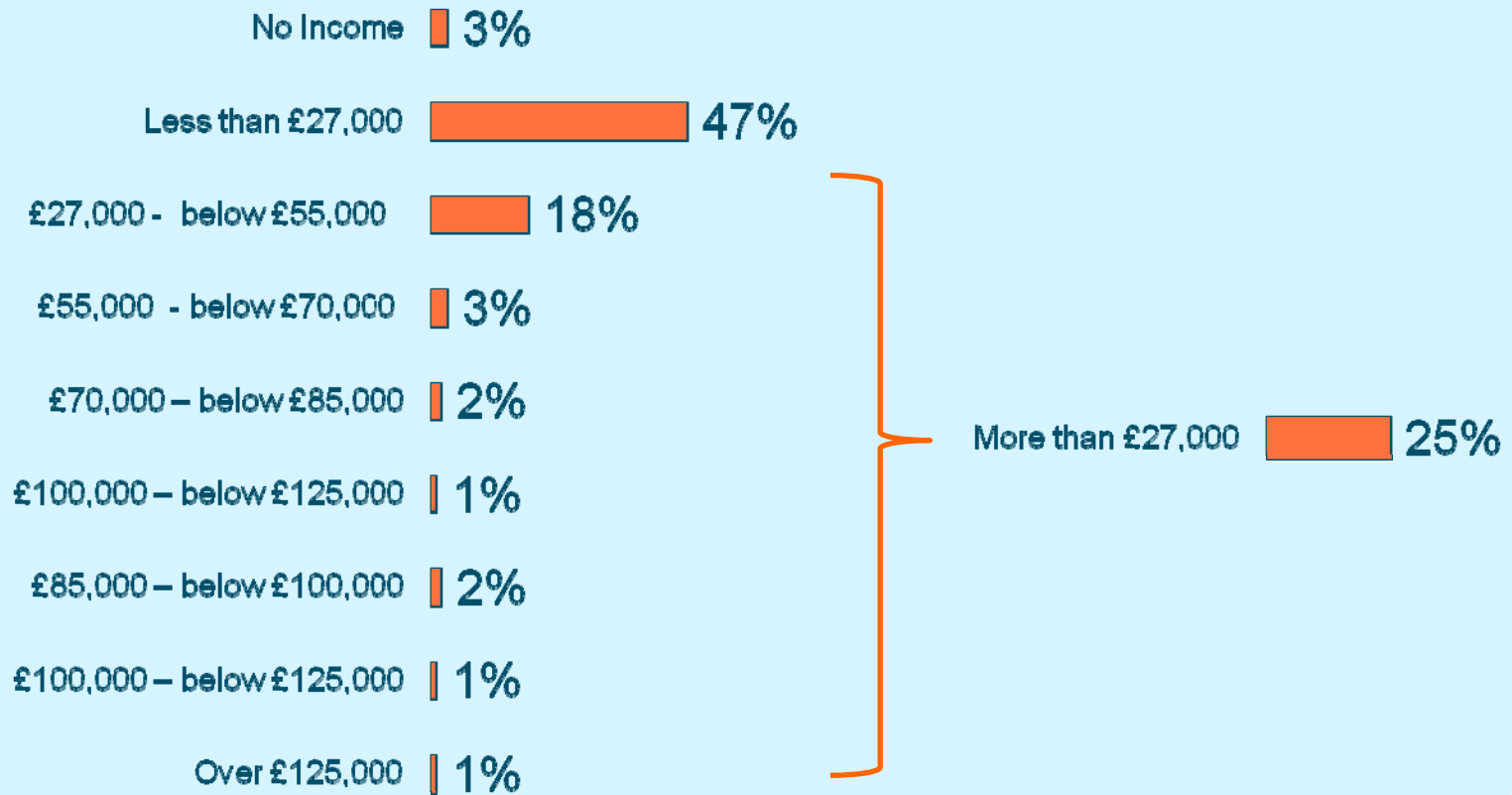
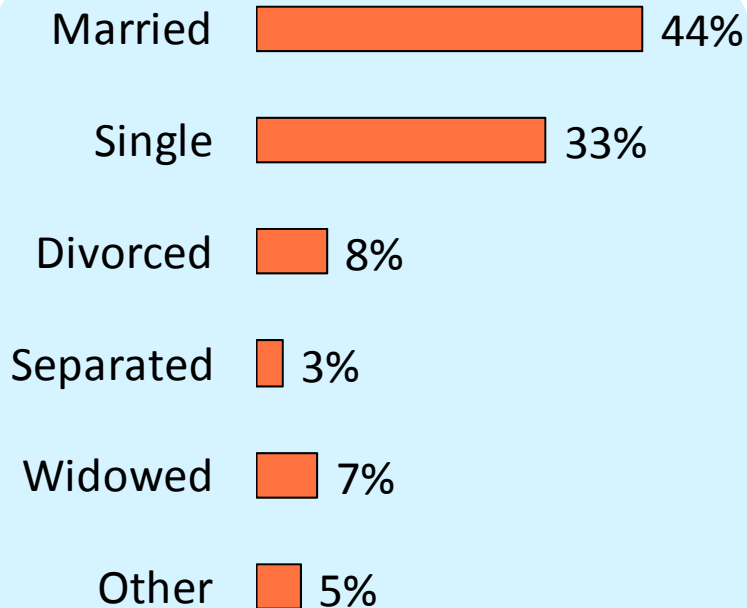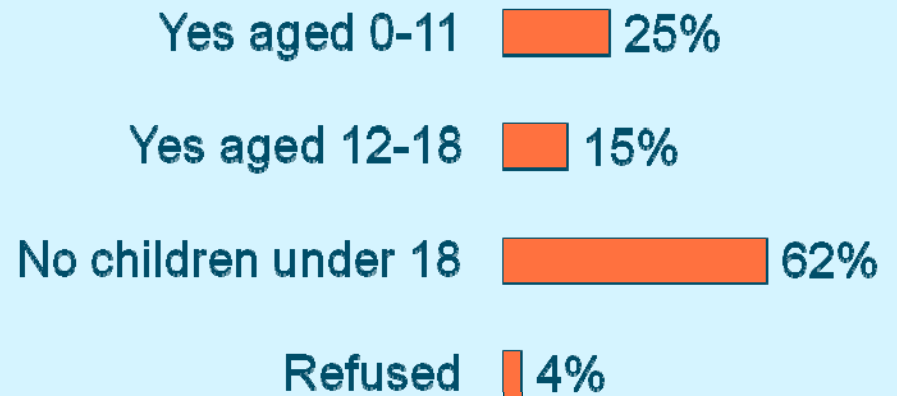*Source: Q_HHIncomeWhich of these brackets does your annual household income before tax fit?*
Base: Total Respondents (n=876)

Marital Status & Children

Marital Status

Children in household

Marital Status	
Married	44%
Single	33%
Divorced	8%
Separated	3%
Widowed	7%
Other	5%

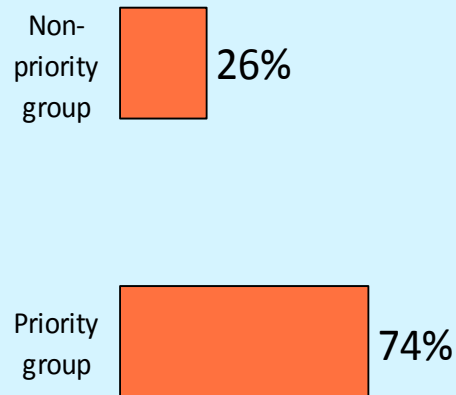| Children in household	
Yes aged 0-11	25%
Yes aged 12-18	15%
No children under 18	62%
Refused	4%

Source: Q_MaritalStatus: What is your current marital status? Q_Children: Are there children or young people aged under 18 living in your household?
Base: Total Respondents (n=876)

Benefits

No — 53%

Yes — 38%

Refused — 9%
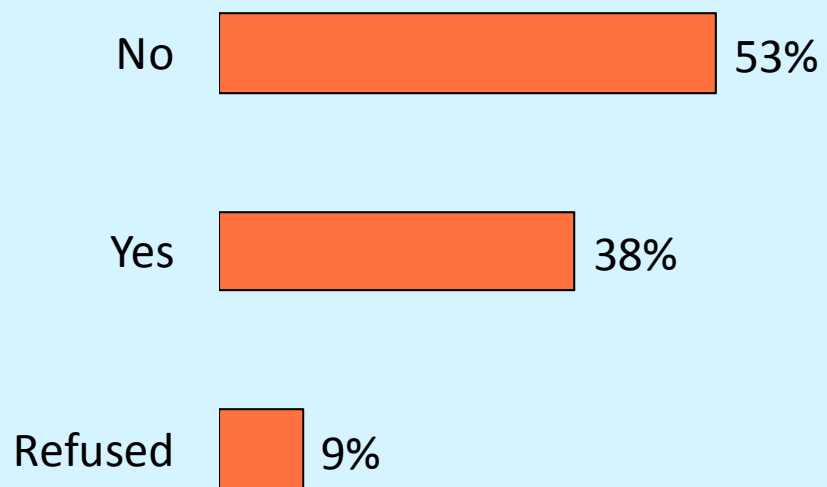
Source:Q_Benefits Do you receive any state benefits?
Base: Total Respondents (n=876)

'Vulnerable' group

Non-priority group ▮ 26%

Priority group ▮ 74%

Vulnerable are those who:

•Low income (on benefits OR have no / less than £27k income)
AND
•Have very young children (under 11 yrs) in the household ***OR*** are elderly (over 70 yrs)

Base: Total Respondents (n=876)

Priority / Non Priority Group

- **The definition of the CERT Priority group for Ofgem reporting is - customers in receipt of benefits / tax credits or elderly (70 years or over)**

- No. of customers interviewed that confirm they receive benefits / tax credits: 333 38%

- No. of customers interviewed that confirm they are 70 or over (not in receipt of benefits / tax credits: 88 10%

- No. of customers interviewed : 876

Customers in receipt of benefits and tax credits have only been counted once, i.e. customers have been counted in either the benefits or the elderly Priority Group, not both.