



CADMUS



Are We There Yet? How To Measure Market Transformation (And Count the Savings)

Jane Colby

March 22, 2016

Market Transformation



Education & Marketing



Creates Awareness



Product Availability



Before



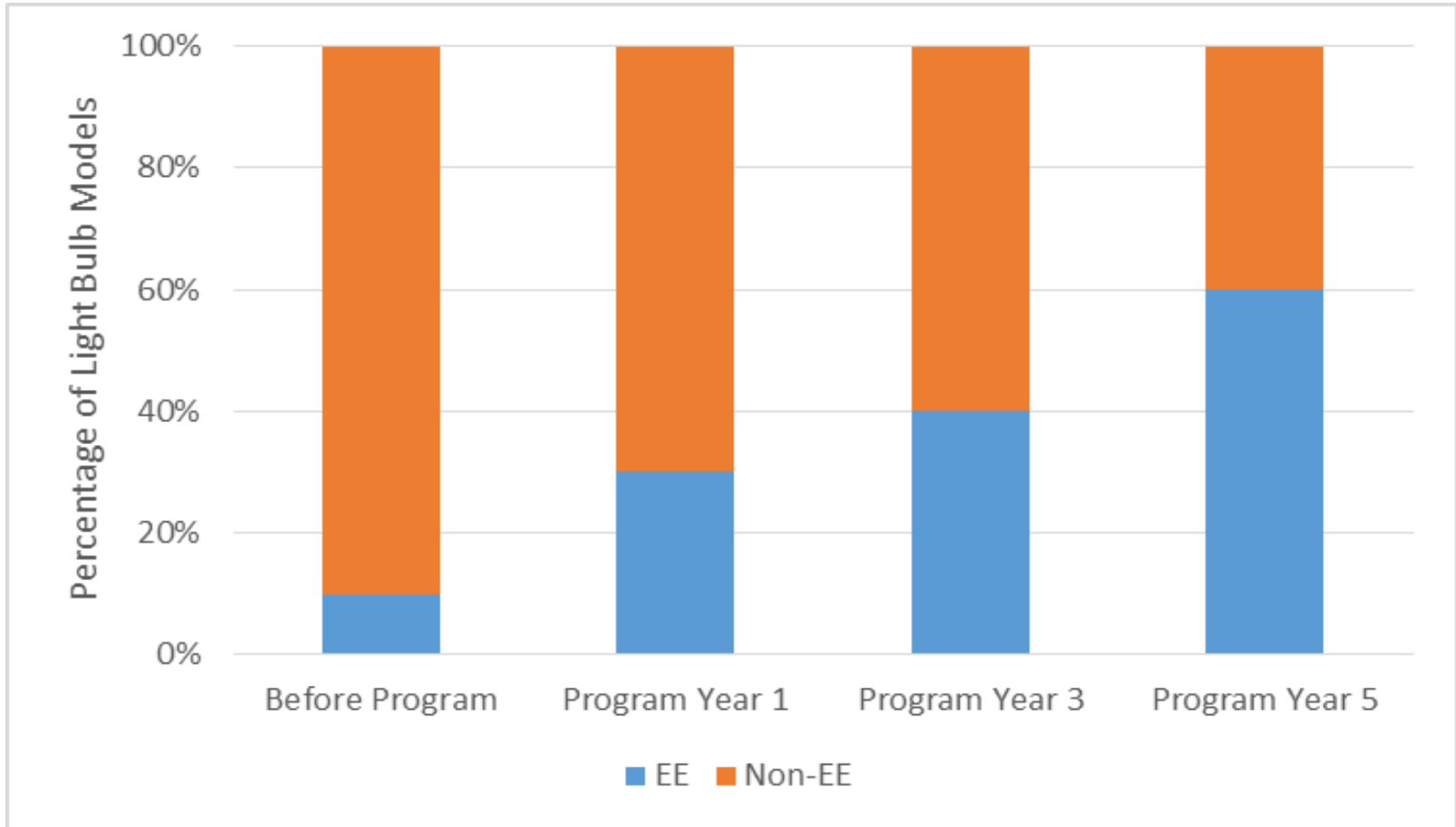
After

Measuring Market Transformation

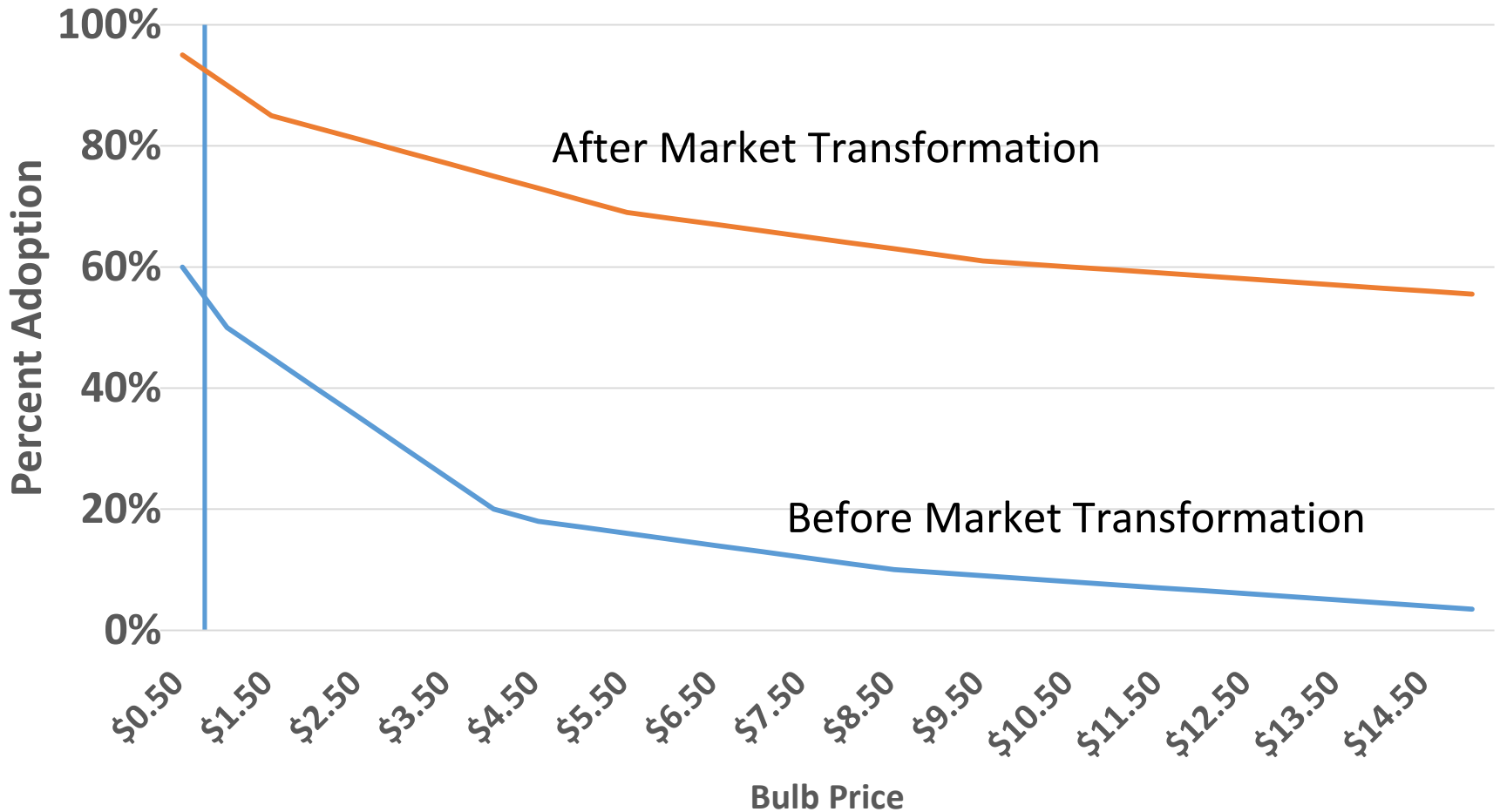
Consumer Awareness & Satisfaction



Efficient Stocking



Willingness to Pay



How Do You Count The Savings?

5.60	21.06	-0.10
21.16	21.10	-0.30
21.35	9.61	+0.37
9.75	14.51	-0.05
14.84	9.17	+0.03
9.24	29.50	
29.79	13.50	+0.06
13.59	19.65	+0.07
19.73	21.06	
21.16		

Traditional Attribution

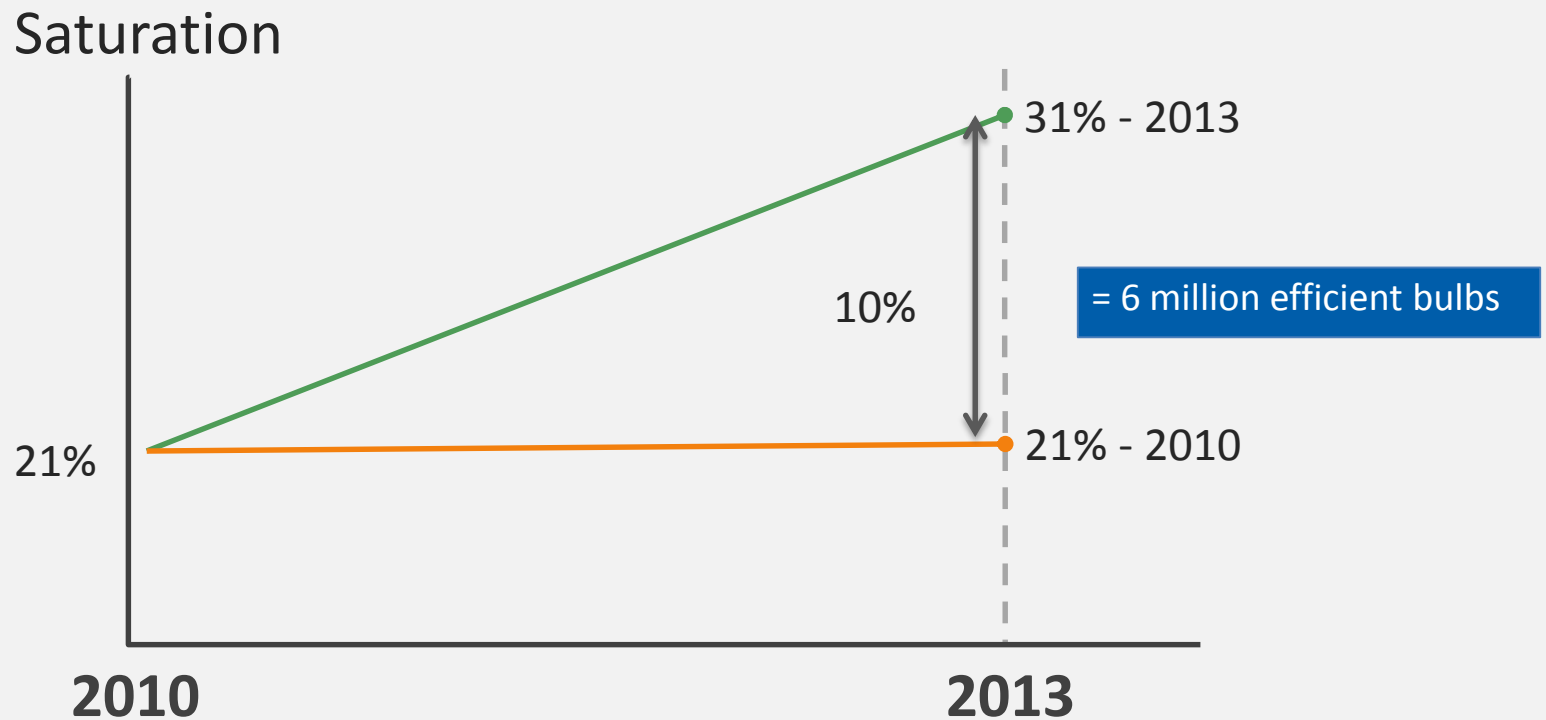
A photograph of three young women walking through a busy city street, laughing joyfully. They are carrying several colorful shopping bags (pink, blue, purple, and black). The woman on the left is wearing a white top and a blue skirt. The woman in the middle is wearing a pink top and a black skirt. The woman on the right is wearing a blue top and a black skirt. The background is a blurred city street with other pedestrians and buildings.

Dear Shopper: If those light bulbs were not discounted by your utility, would you have still purchased one?



But wait.... if these light bulbs were not stocked at the store, or you had never heard of them, or never used one would you have still purchased one?

Measure efficient lighting in homes



Customer Name



First

Last

Address

City

ZIP

Audit Start

Audit End

Removal Start

Removal End

Cadmus ID

Site Details

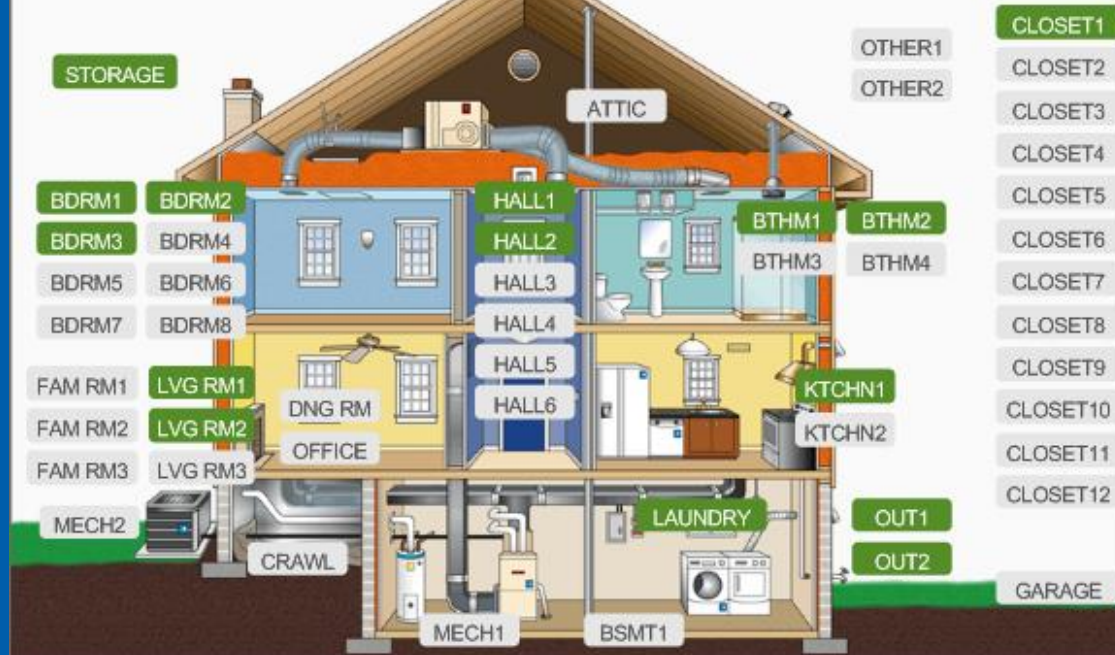
Incentive/Photos/Notes

Initial Interview

Meters

Room Inventory

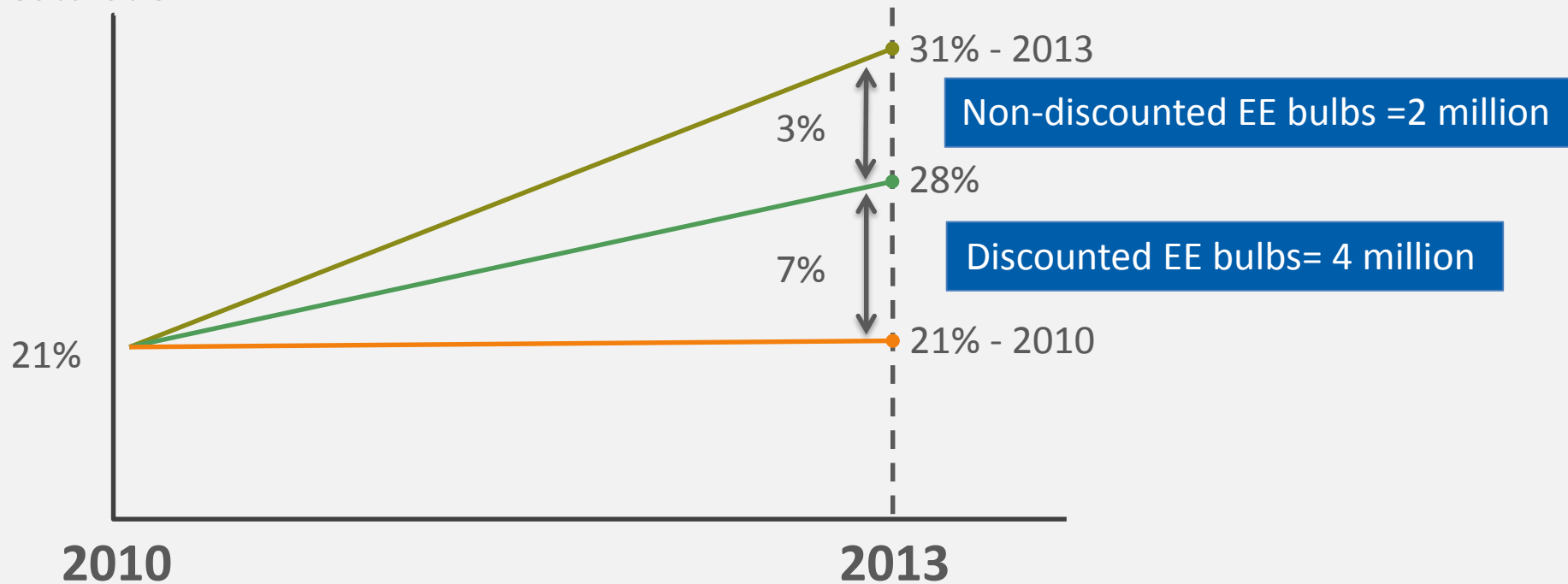
Mechanical



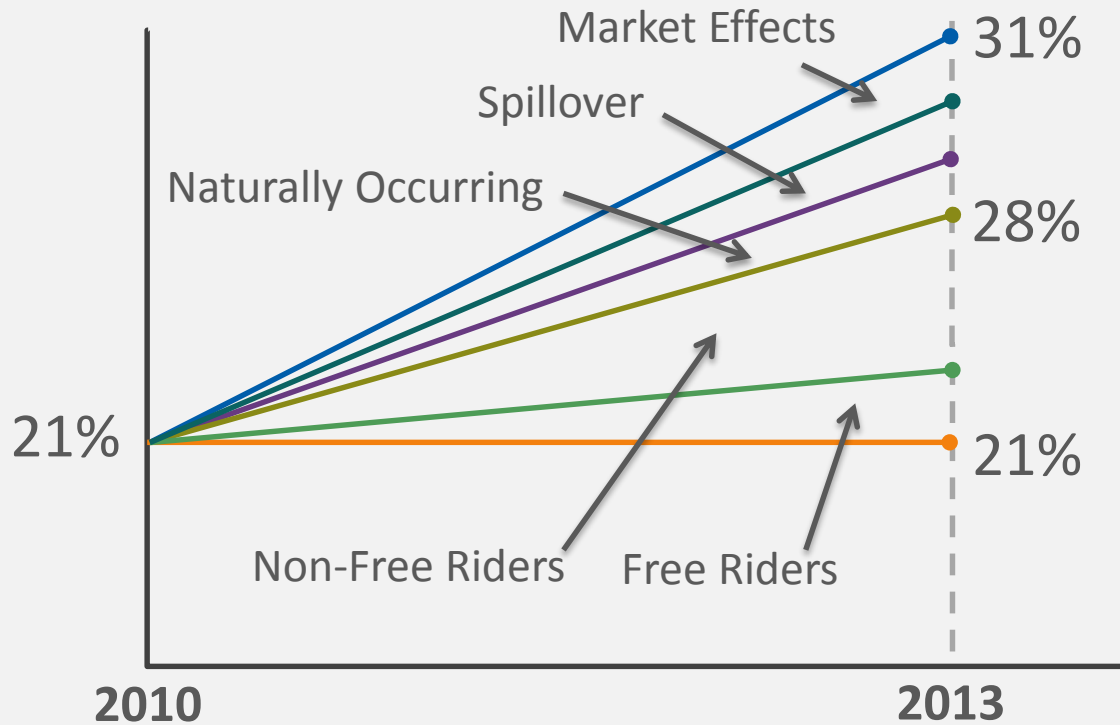
Install Tech Removal Tech

Add in Program Accounting

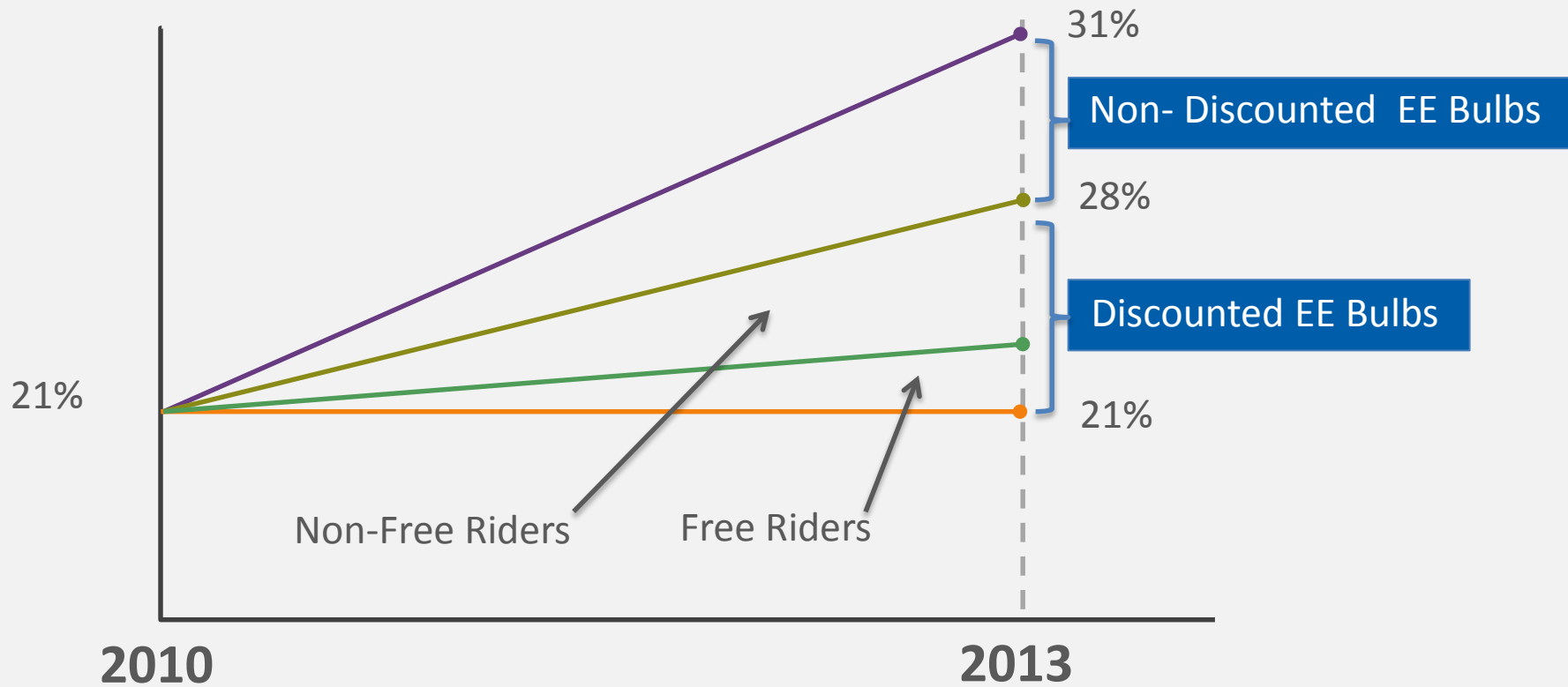
Efficient Light Bulb Saturation



Full Attribution



Attribute Program Discounted EE Bulbs

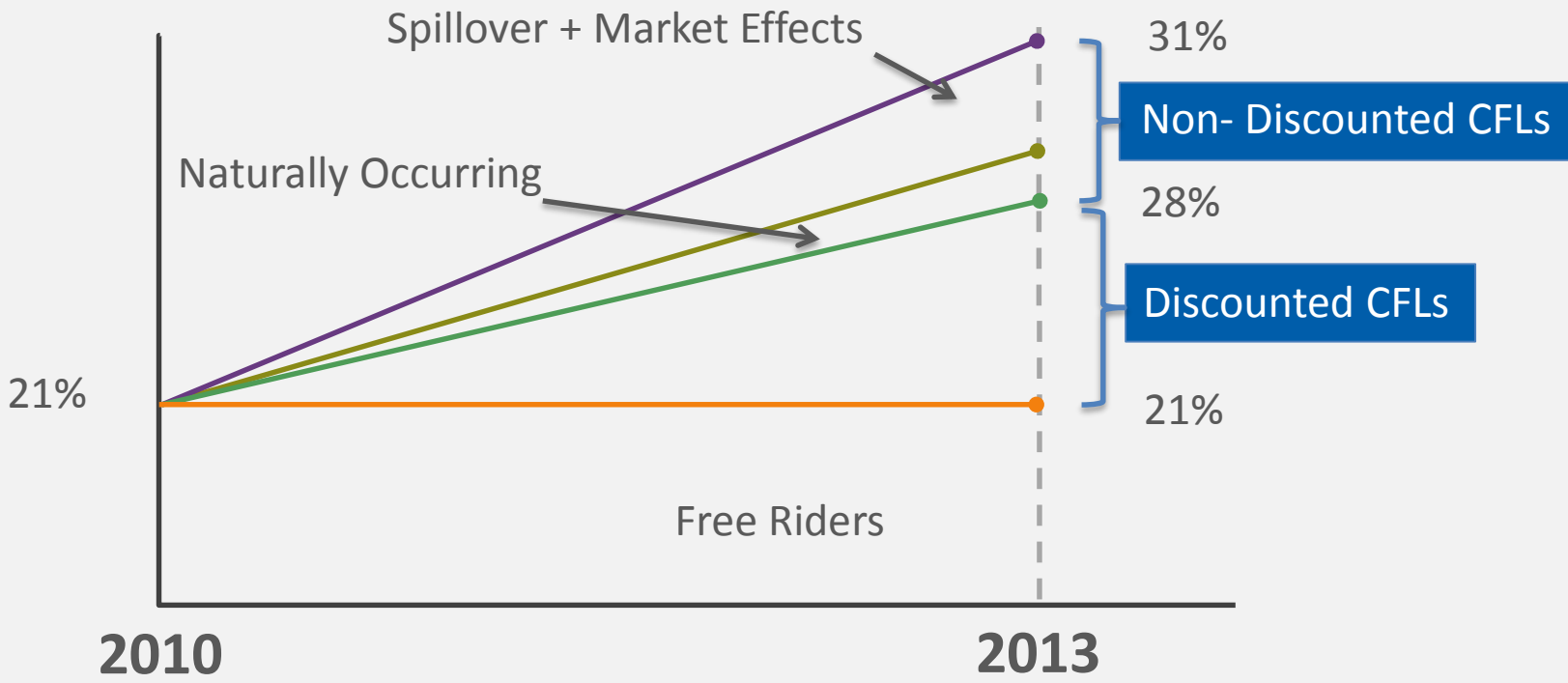


Free riders –

**would have purchased same light bulb
without program discount**

Does not result in “program” savings

Proportion Naturally Occurring \approx Proportion Free ridership



Spillover & Market Effects

- **Spillover (Short Term)**
Program Awareness
- **Market Effects (Long Term)**
Market Changes
 - Consumer education
 - Increased program stocking
 - Retailer sales knowledge

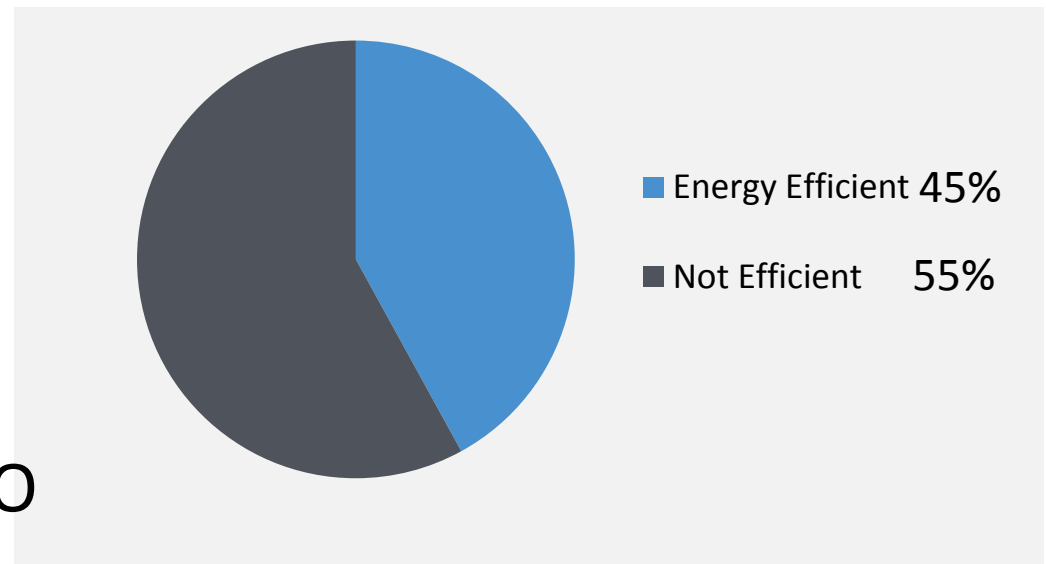
Spillover & Market Effects

- **Attribution:**

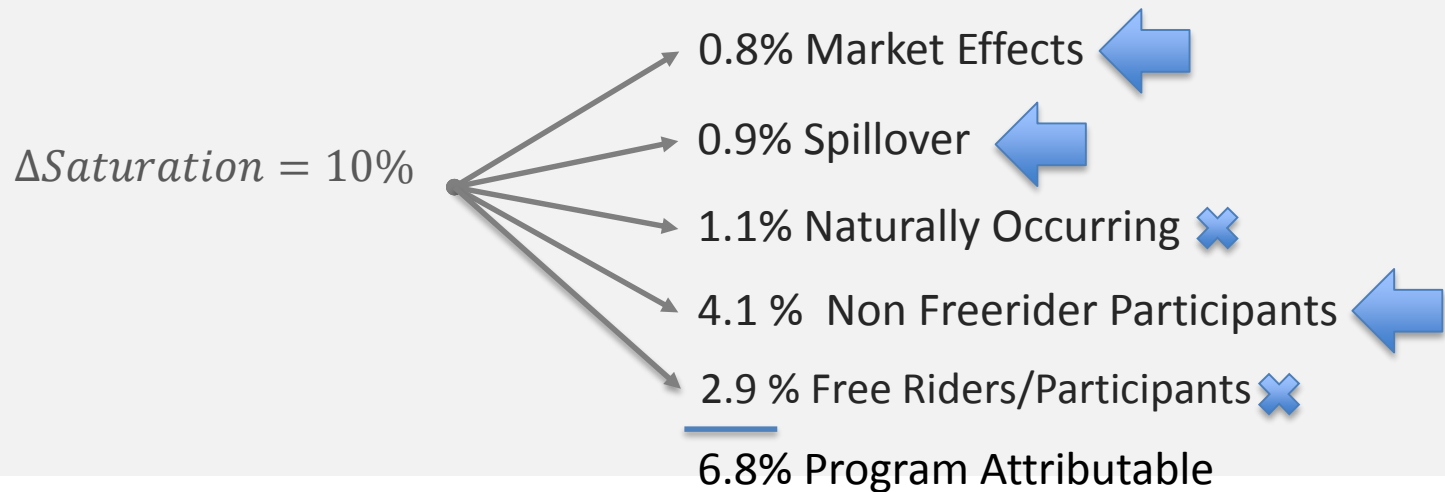
Market Indicator

– Energy Efficient
Bulb Stocking

– 45%/55% = ME/SO



Attribution



Program Impacts:

4 million bulbs discounted resulted in about 5 million program-induced installations



CADMUS



Jane Colby

Principal, Energy Services

Office: (970) 736-1146

Jane.Colby@cadmusgroup.com



Facebook.com/CadmusGroup



@CadmusGroup



LinkedIn.com/company/the-Cadmus-group