

*Market Progress Evaluation Report* Executive Summary

## Lighting Design Lab

*prepared by*

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## Executive Summary

The Lighting Design Lab in Seattle provides educational programs, technology displays, consultations, and facility based evaluation tools to professionals who make decisions with respect to residential, commercial and industrial buildings — architects, lighting designers, interior designers, electrical engineers, building owners, facility managers and facility engineers. The goal of the Lab is to provide information, training and demonstration of state of the art lighting design and products in order to promote energy efficient lighting design in commercial and residential buildings.

This report is a market baseline, which describes the Lab's programs, its target audiences, its influence on its clients' practices, and its impacts on the efficiency of buildings. The report was commissioned in June of 1998 by the Northwest Energy Efficiency Alliance. The report is based on data collected by the Lab as part of its routine activities, data derived from public and private sources about the target audiences (for example, licensing data, data from the Internet, lists obtained from professional associations), interviews with staff and others, and two surveys, a survey of 150 Lab users and a survey of 76 professionals who were not Lab users (nonparticipants) but come from groups identified as part of the Lab's target audiences.

This report was preceded by report #98-006, "Process Evaluation of the Lighting Design Lab."

### **This research answers five important questions**

1. Is the Lab reaching its key markets? Are the players in the markets aware of the Lab? Is the Lab penetrating these markets with its services?
2. If the Lab is reaching its markets, are the actors in those markets changing relevant behaviors?
3. If actors in the markets have changed their behaviors, is there evidence that the changes are increasing energy efficiency of buildings?
4. Is there evidence that changes in behavior and their impacts will continue in the future?
5. What factors are influencing actors within the market to change their behaviors?

## The Lab is reaching its audiences

From its facility located near the Convention Center in Seattle, the Lab has had more than 16,000 visits from about 7,900 people since January 1995. *We estimate that the Lab has provided services to between 10 and 20 percent of architects, lighting designers, interior designers, building owners and managers, and electrical engineers in the Northwest.*

This report presents the evidence that we have been able to assemble with respect to market penetration. Unfortunately, there is no one set of data that is fully complete for the Northwest. Therefore it is necessary to piece together a partial picture from several data sources.

The Lab user survey data indicate that a majority of users have used the Lab two or more times. Architects are the most frequent users of services (24 percent), followed by designers of all types (14 percent), followed by engineers (11 percent). Lab users included people at all levels of professional experience.

Proximity to the Lab influences whether or not professionals use the Lab<sup>1</sup>. The most common reason for visiting the Lab was to attend a workshop or class. However, in the survey when users could identify all of the services that they had used, product demonstrations and consultations were among the most frequently used services and workshops were further down the list.

Lab users were drawn by the up-to-dateness, the quality, and the perceived objectivity of the information provided by the Lab. Nonparticipants said that the information would be the drawing card for them but they also were more likely than Lab users to say that they would use services like those provided by the Lab to understand how to comply with code requirements and to meet training and education requirements.

A primary reason why nonparticipants did not use the Lab was lack of awareness (37 percent). Among those who were aware of the Lab but had not been there, more than half said that distance was a major obstacle and another 21 percent said that it was too time consuming.

## The Lab is influencing behavior

*The Lab is responsible for significant changes in relevant market related behaviors.* Professionals who make or influence lighting decisions and have used Lab services, report that they are specifying and using more efficient lamps and ballasts (53 percent) and paying more attention to fixture placement and wattage (53 percent). Approximately 62 percent say that they are doing more analysis to determine the quantity and quality of illumination after their Lab experience and 27 percent claim that their change in behavior is almost entirely due to the Lab.

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<sup>1</sup> Based on data collected by the Lab when people register.

Persons who influence architectural design reported similar changes in behavior and similarly attributed some of the reasons for those changes in behavior to what they had learned at the Lab.

More than 67 percent of Lab users and nonparticipants say that they use the Internet for work related reasons. Those who are not currently users say that they will be in two years. *Most users and nonparticipants say they are using the Internet to search for product related information.* Only 13 percent of the users say that they have visited the Northwest Lighting On-line site.

We asked Lab users about factors that influence their decision making about products. *Users reported that the most important factor was reliability, the next most important was first cost, and the third most important was information from the Lab.*

### **Users will continue to use behaviors learned as a result of exposure to the Lab**

Forty percent of users say that they have recommended the Lab to a colleague several times. A third say that several times they have used technical data from the Lab to support a decision.

*Approximately half of the respondents who were identified as having changed their behavior or practice in response to what they learned at the Lab, say they will continue the behavior in the future.* Another 38 percent say that they will continue nearly all of the behaviors.

### **Changes to behavior and practice are influencing buildings**

Eighty-seven percent of the respondents say that the changes in practice have influenced at least one building. *More than 20 percent say that changes in their behavior in response to what they learned at the Lab have influenced 21 or more buildings.* About the same number say that they expect that the changes will influence 21 or more buildings in the next two years. About 20 percent of the Lab users say that what they learned is influencing most of the buildings with which they are dealing.