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NEEA: Commercial Lighting Decision Maker Groups

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BACKGROUND

NEEA was looking to understand who the main purchase decision makers and influencers are for Luminaire Level Lighting Controls (LLLC).

They needed help developing targeted marketing messages and a marketing plan in order to significantly increase market saturation in commercial buildings.

OBJECTIVES

Determine who LLLC purchase decision makers/influencers are while conducting qualitative research with commercial lighting decision makers/influencers to understand/uncover:

- Barriers, motivators and purchasing behaviors
- The LLLC purchase decision-making process
- The importance of Non-Energy Benefits (NEBs) and energy savings
- Additional insights to inform segmented messaging and the NEEA 2017 LLLC Marketing Plan
- Develop segment profiles with corresponding marketing messages



WHERE WE WENT & WHAT WE DID



Cincinnati, OH October, 2016



Seattle, WA
November 9, 2016



Seattle, WA
November 10, 2016

Phase 1: Knowledge Audit

The Seek team reviewed NEEA's existing research and information to highlight current understanding, identify gaps and fully develop the details of the research plan.

The Audit was utilized to align on the three key "target groups" of decision makers who should be prioritized as participants in the research.

The Seek and NEEA teams worked together to identify right target groups for research and aligned on the right questions to ask based on findings and identified need gaps.

Phase 2: Purchasers & Influencers

The Seek team conducted three focus group sessions in order to meet and identify the role of some key decision makers and influencers in the commercial lighting purchase process. Target respondents joined in a collaborative discussion facilitated by a Seek consultant.

The NEEA + Capstrat team witnessed the groups from the backroom of the facility.

An individual reflection and group debrief with the internal team followed each group.

Phase 3: Full Day Synthesis + Messaging Creation

The NEEA + Capstrat team participated by taking detailed notes during the day of research, and actively engaging with the data during the full day debrief session following the groups.

During this debrief session, the teams examined the data to identify tensions, begin developing consumer profiles and consider the messaging implications of the findings.

WHO WE MET

Group 1

Primary Property Owners | Financial Decision Makers on a Commercial Lighting Project

Group 2

Primary Property Managers | Decision Makers & Influencers on a Commercial Lighting Project

Group 3

Lighting Designers | Architects, Decision Influencers, who have worked on Commercial Lighting Projects



ACROSS ALL GROUPS

Key Insights/Findings

Meeting Client and Tenant Needs

• Each lighting project discussed throughout the groups had a unique purpose/goal to meet for particular clients or tenants. Some groups were more interested in serving multiple clients or tenants over the long run, but there was always a desire to create a space that would meet the needs of the people in the building. Lighting was not an area of expertise for all of the groups, but each group was aware that lighting had meaningful implications on the client and tenant experience in their building.

Thinking Long Term

• Thinking long term both **financially** and **physically** (for the building) were important to all of the groups when it came to purchasing commercial lighting. Cost and budgets were huge issues when involved in lighting projects from any perspective. Whether an owner was looking to save money, or a client did not have the money to spend on a more complex project, **long term financial health was a major driver when lighting system decisions were made.** In addition, **the long term health of the physical building** remained a top concern in each group. **Owners, managers and designers all wanted to develop a space that would create long term appeal.**

Education and Awareness

• Varying levels of awareness around advanced lighting controls, utility incentives and other lighting technologies revealed that there is work to be done when it comes to educating these groups on lighting systems. While the understanding of its importance exists, information about current lighting options should be coming at each of these groups from different angles to expand their knowledge base and familiarity. Not only are online resources like Google and YouTube trusted sources and channels for content, but preference for video demonstrates a desire to be shown how a product works rather than told. Trusted influencers like contractors, distributors and manufacturers also play an important role in understanding the content.

Primary Influencers Have to Trust It

• Early adoption of technology was an uncomfortable topic for each of the groups. Especially when it came to lighting, each group demonstrated behaviors of purchasing products that they felt comfortable with either from their own experience or the experience of their peers. Although there is an existing desire to be unique and different with newer technology, none of these groups were comfortable taking a leap of faith without their primary influencers assuring them they would be satisfied with their choice. In the end, they were unlikely to purchase products that they had not used or their trusted advisors had not recommended.





Group #1 *

Primary Property Owner | Financial Decision Maker

Who Is This Segment? [Aaron's Story]

Owning small commercial buildings has been a wild and adventurous ride for Aaron. Never knowing what questions or issues will arise next; he finds himself **dealing with some** problems that he can handle on his own, and others that he does not understand quite as well.

Fortunately, Aaron has a few peers in the industry that he can look to for answers. Even more importantly, he **has Google right at his fingertips to quickly educate himself on the areas he does not know as well.** (After all, if he's going to have an intelligent conversation with someone about his issues - he needs to at least know *a little bit* about the subject.)

Although the day-to-day maintenance issues can be stressful at times, Aaron is confident that his property investments make sense and will pay off in the long run. When he makes decisions regarding his properties, he is sure to assess the financial pay off and return on his investments. Especially as an owner of smaller buildings, Aaron needs to know that his spaces are maintaining their appeal to current and *future* tenants. He is forced to assume that his current tenants are "temporary" and makes his decisions with future tenants in mind.

As a result of this mindset, Aaron is fairly risk averse when he invests in his buildings. He is seeking simple solutions that will have broad appeal and "get the job done".

Specifically in regard to lighting, he just needs to know that his systems are up to code and are enough to keep his tenants satisfied. Those bigger, smarter and more complicated lighting systems probably sound nice for the owners of bigger buildings. However, he just needs enough to keep his tenants happy. **After all, happy tenants make for a happy landlord.**

Key Lighting Drivers / Benefits

Flexibility and Reliability

• As he is thinking longer-term with his solution, flexibility and reliability (less maintenance) moving forward are benefits that tie closely to the lighting decisions he is making.

Cautious and Risk Averse

• He needs to know he will get his money back as a result of his choice. He is willing to spend money if he sees a long term benefit. He does not want to spend too much adopting early.

Energy Cost Savings

• Not only is he looking to make a wise investment and get his money back, he is looking to *save money* as a result of his investment.

Building Improvement

• He would like for his decisions to enhance the quality of his building and make it worth more moving forward.

Primary Influencers

Google

• His first stop to educate himself on any subject before consulting with other (more trusted) peers.

Peers and Connections

• The second stop after he uses Google to gain foundational knowledge. His primary connections include **distributors**, property/facility managers, trade groups/networking organizations, and his closest contractors/electricians.

Information Sources

• Trade magazines (often online), message boards and resources like Lighting Design Lab in Seattle.

*The profile for Group #1 is representative of smaller building owners who operate on a tighter budget and are more hands-on when it comes to maintaining their properties. While the findings likely reflect some of the broader audience (owners of small and large buildings), it is important to note that this profile does not take into account the experience of larger building owners.



Group #1

Primary Property Owner | Financial Decision Maker

Tensions

The following tensions were articulated to represent the Primary Property Owner | Financial Decision Maker of both small and large commercial properties:

- I need to have a desirable space. What can make it better, different and easier to rent?
- I need the right investments that will make my building worth more over time.
- I'm relying on those close to me to be educated so I can make the right choice. I am not currently educated and don't have a desire to be. I want easy high level understanding so I'm not taken advantage of by others. I am focused on the bottom line.
- I'm up for the latest & greatest in order to differentiate, but it needs to be the right thing. I don't want to take a risk and get a product that is troublesome and not fully developed.
- I like to think my buildings could get publicity, credit and notoriety.

The following tensions were articulated to represent the Primary Property Owner | Financial Decision Maker of <u>exclusively small commercial properties</u>:

- As an owner of a smaller commercial space, the money and Return On Investment (ROI) are important to me. I oftentimes don't have the luxury of window shopping when I have a need.
- As an owner of a smaller commercial space, price becomes an issue because I don't have economies of scale on my side. This is an advantage for those who are purchasing more materials for bigger buildings.

Key Insights/Findings

Thinking Long Term [Building Value]

• It is not good enough for these owners to only consider their next tenant occupying the building. They feel the need to be intentional in their lighting choices as they want the building to have long term appeal, versatility and reliability for whomever might rent it in the future. More advanced (or unknown) lighting options seem like a threat to the long-term flexibility of the building. Additionally, they want to play their safest bet when it comes to a system that will promote the simplest/least maintenance options.

Thinking Long Term [Financially: ROI]

• There were very different views amongst this group regarding the ROI and how it affects their decisions on lighting projects. However, there was one theme that was consistent among the different opinions: it was imperative that the owner understand and know what to expect when it came to ROI. The costs incurred needed to make sense. While high cost was a primary barrier, it could be justified if they knew they would get the money back in a reasonable amount of time (in their opinion).

Research Starts with Google

• These building owners relied heavily on Google to find information online. The initial Google search often served to inform them of topics that they didn't feel informed enough on to be comfortable discussing. Lighting fit into this category. Once they familiarized themselves using Google, the next step was going to "real" resources and people to ask informed questions.

Unfamiliar with Utility Incentives

• When it came to making decisions and eventually "signing on the dotted line" to make a purchase decision in the category - these folks were not aware of the utility incentives made available to them. They displayed a certain lack of knowledge in this realm. Utility incentives could greatly benefit these individuals if they knew what was available to them.

Additional Insights/Findings*

Seeking "The Simple Solution"

• The Building Owners/Primary Financial Decision Makers had a knack for keeping things simple and avoiding potential risks. These particular Owners operated smaller Commercial spaces, and as a result were not looking to differentiate themselves with the flashiest new products or systems. Especially if they were expensive. In fact, these Owners were seeking general appeal when it came to the long term sustainability and renting appeal of their buildings. As long as they could keep the building occupied with a trustworthy tenant they were feeling victorious.

Low Awareness for Advanced Lighting Controls

 When digging in to understand this group's familiarity with advanced lighting controls, the results were underwhelming. Products and ideas that had been around for years in the lighting industry were fascinating to many in this group. They had very basic knowledge of how light can affect the energy use of a building, and they didn't seem to know that LED is past the early adopter phase. They were not up to date on lighting technology.

* It is important to note that these insights directly represent the audience we spoke to. While they reflect some of the broader audience (owners of different sized buildings), these specific findings are primarily based on the owners of <u>smaller buildings</u>.

Early Adoption Is Scary

• These people knew that the lighting world is "always changing". In their minds, why would they pay more for new lighting systems now when lighting options would more than likely change soon? Even if a new system was the best-inclass and had a promising future, they believed that it would be better to wait and the price would come down in about 2 years with more functionality. Not to mention once installed there is not a feasible option to revert back to previous systems. This in itself instills a sense of fear and hesitation until the benefits of a new system have been clearly proven in the field.

Worth the Risk For Me?

• Investing in a higher quality lighting system means a significant financial investment that they aren't sure they need for their purposes. "It sounds promising, but it depends on the scale. I don't know exactly how it fits with the kind of projects I am doing. Especially on the cost of installation."

Messaging Idea Starters

Messaging Opportunities

- Add messaging around LLLCs improving the attractiveness/positioning of the building to tenants.
- Push awareness that utility incentives will create faster Return On Investment.
- · Opportunity to point to prominent examples of successful LLLC-type advanced lighting controls systems.
- Market the percentage benefits seen in switching to an LLLC system (i.e. show that lighting costs could be reduced 40-70%). Commercial spaces are all about the bottom line and this would be compelling to these owners.

Benefits to focus on:

- Ease of installation and customization
- Long term energy efficiency savings
- Decreased level of maintenance required
- Multiple tenant appeal and long term usage

Tactical Opportunities

- Focus on influencing property managers and distributors by highlighting the benefits with them in order to influence and inform these owners.
- Peers adopting the technology is likely to resonate with other owners.
- Opportunity to get products into the BOMA collective buying program.
- Identify ways to reduce purchase price.



Group #2

Primary Property Managers | Decision Makers

Who Is This Segment? [Bill's Story]

Bill has never been one to sit around and relax. Fortunately, he finds himself in an occupation where there is never a shortage of things to be done. As a property manager, he tackles an inordinate amount of tasks that continually keep him on his toes. He realizes that his productivity is imperative. Otherwise, he will fall behind on what is already a long list of projects to be completed.

Bill is required to be well-rounded and knowledgeable in many areas. The good news is that he can utilize search engines and video channels as important resources to educate him on the topics he doesn't know as well.

His job is unique because he does not always make the "final call" on purchase decisions. Oftentimes he is asked by the owners of his buildings to research and share potential purchase options when it comes to maintenance, repairs or larger investments. Especially when it comes to the larger investments, the building owners like to make an informed purchase decision based on the options and criteria that Bill presents to them.

This is an area where Bill is forced to find balance. **He finds** himself in-between a building's tenant and owner who oftentimes have differing perspectives on what purchases should be made.

When it comes to lighting, he has to be an expert at recommending the benefits of a purchase to the owner based on the goals of the business and how to effectively meet them. Unfortunately, he is not an expert in the industry or fully aware of all of the existing options and their benefits. Bill finds that the owners want to make a purchase that is affordable and reliable. This might contradict what he and the tenants believe is best for the building, but, when it comes down to it, the owners are the ones writing the check.

Key Lighting Drivers / Benefits

Maintenance Over Time

• Understanding he is getting a reliable system that can be trusted and have minimal expenses moving forward.

Utility Incentives

 As he is forced to learn about the category and make recommendations to owners, he is more aware of and driven by utility incentives.

Tenant Satisfaction

• He focuses on lighting options that will meet the specific needs of the tenant and business owner then pitches those options to the building owner.

Seeing Trusted Early Adopters

• Especially as he is not the primary financial decision maker, he needs to pitch and advocate for products he knows are trustworthy (from his experience or his peers' experience).

Cost Savings / Energy Efficiency Savings

• He is aware that his choice has energy cost implications and wants to make a wise decision.

Primary Influencers

Google and YouTube

• He is quick to look online for information and solutions. Google is the primary research tool, but YouTube is highly valued as a "how-to" hands on resource.

Architects, Designers, Electricians, Distributors

• In the end, he trusts his human resources and the experts' opinions when it comes to lighting.

Utility Companies

• The awareness of utility incentives made this relationship important for him.



Group #2

Primary Property Managers | Decision Makers

Tensions

The following tensions were articulated to represent the Primary Property Managers / Decision Makers:

- People are always pulling for my time and I find myself very busy with a variety of different tasks. I am responsible for a lot and I can't know everything; I feel like a jack of all trades, but a master of none.
- In the end, I am not the primary decision maker. I am just an influencer in the process.
- I am forced to balance the desires and expectations of both the owner and the tenant. I am forced to recommend and defend solutions that will satisfy both parties.
- I need to fill/rent my owner's space. How can I make it more desirable?
- I have skepticism toward new ideas that my peers and I have both not yet encountered.
- I am seeking further education, but don't know where to look besides Google and YouTube. (I sometimes talk to my connections such as distributors, contractors and architects.)
- I want to "live like the Jetsons" and enable my tenants to do the same, but I am not aware that the technology currently exists.
- Cost & complexity are huge factors when making my decisions and pitching to the owners.

Key Insights/Findings

The Manager Role: Presenting Options to the Owner

• Building/Property Managers are required to be well-rounded in their knowledge of the category and use said knowledge to make a proper estimate of costs and present options, although in the end, they are not making the final decision. Their world consists of creating a list of options ("A,B and C") that the client can assess and determine which route is best. This is critical to understand as the building owner has his own agenda (which oftentimes revolves around simplicity and favorable price points.)

Tenant Needs are Critical

• Attempting to better understand the needs of the tenant is a driver as these managers consider lighting options. The immediate tenant needs have more of an impact with the mindset of these managers than with the owners (who have a longer term mindset that includes the well being of future tenants). However, both the managers and owners understand the importance of quality lighting to enhance the worth of the building.

Resourceful and Effective (Online)

• This group utilizes the internet to their advantage as a primary search function - specifically using Google and YouTube. YouTube provides the specific "how-to" knowledge that these managers and their teams so desperately need in their role. If they feel incapable of accomplishing a task - they can often find the tips and tricks necessary in video form. YouTube is a source that they cherish in their "maintenance heavy" role. Sometimes they will utilize it specifically to understand whether they should outsource a project or complete the project in-house.

Resourceful and Effective (With People)

• While Google/YouTube searches can act as a quick educator for this group when they come across a need - they are most likely to rely on their network of people for real advice and recommendations. Close connections with designers/architects, distributors/electrical contractors, other property managers, and utility company employees enable property managers to network their way to best-in-class recommendations from their expert peers.

Key Insights/Findings

Jack of All Trades, Master of None

• The Building/Property managers have an obligation to understand all facets of their properties - a task that is seemingly impossible as they cannot be an "expert" in every area. They are proactive and solution-oriented as they seek to keep both owners and tenants satisfied. As a result of their circumstances, lighting is not always top of mind for this group. They understand its importance, but have not dedicated their precious time to becoming more educated on the topic.

I'll Trust New Things...If My Peers Trust Them

• This was not a group of first movers looking to take the risk on a product or system that might be fantastic. They were seeking to install reliable products and systems that they could trust to deliver from the start. This included products that they had used in the past, or specific products that had been tested and approved by friends or closely trusted industry experts.

Unaware of Existing Technology (I Want to Live Like the Jetsons)

• Given the opportunity to hypothetically create their perfectly lighted (commercial) environment, these folks described almost exclusively products and features that already exist. The interesting part? They weren't aware that these products were available to them. They described showy and high tech products only to determine that it would be nice to "live like the Jetsons" - a phrase that came up multiple times throughout the discussion. While the lighting they described is a reality, there is an education gap with this group that includes awareness of the products as well as the real benefits they offer.

Higher Awareness of Utility Incentives

• Whereas Group 1 (Building Owners/Primary Financial Decision Makers) were not up to speed on the utility incentives and how they could best capitalize on them, this group of Building/Property Managers were much more familiar. Awareness and understanding of these incentives have a dramatic impact on product choices as there are large cost implications.

Messaging Idea Starters

Messaging Opportunities

- Position as a product that will require fewer replacements and fewer repairs in the long run.
- Highlight the value added for the owner because, beyond the current tenants, the lighting will work for future tenants.
- Highlight and focus on the benefit of addressing issues from their phone to save trips.
- Position and identify LLLC as a new and cutting edge product. Allow them to feel like they are bringing new and innovative technology to the table for their boss and peers that they can be proud of (playing off of "The Jetsons" mindset).

Benefits to focus on:

- Ease of installation
- Long term energy efficiency savings
- Decreased level of maintenance required
- Multiple tenant appeal and long term usage

Tactical Opportunities

- Demonstrations of inspirational peers, case studies and successes are critical when making a compelling argument to this audience. Contractors and distributors are trusted sources to utilize through these demonstrations.
- Content (such as videos) to show how the product works and what benefits it provides.
- Frequency and Source: **Need to hear about the success from multiple sources.** Especially looking for influencer confirmation via word of mouth.



Group #3

Lighting Designers | Architects

Who Is This Segment? [Cathy's Story]

Creating art has been a strong suit for Cathy since she was young. She always wanted to focus her creative energy on something constructive, and her career in lighting design has been a perfect fit. She not only has a knack for the design aspect, but **she is very intelligent and able to leverage her relationship with experts to better comprehend codes that are crucial for her to understand in her role.**

Unfortunately, these codes, along with her clients' budgetary restraints, create major creative roadblocks for Cathy. She has a desire to create custom lighting experiences that are innovative and exciting, but the reality of her circumstances keeps her from doing so.

As a result, she tends to fall back on the same products that she has used in the past. The products that she knows will meet code requirements and will be "good enough to get the job done." This is to her great disappointment because **she understands the landscape of products available to her** and desires to create brilliant designs for her clients.

Cathy has been a designer for many years and has seen major shifts in the industry during her time. The most notable change has been the length of time it takes to complete a construction project. She now finds herself having to turn around projects a lot quicker as opposed to the recent past when she had time to plan them out. This impacts Cathy's ability to be "forward thinking". Even so, her buildings are not complete for approximately 2 to 3 years, and there will likely be new technology that she was unaware of when the design process for her building took place. This results in her insecurity of the building looking dated.

As a stifled creative mind, Cathy continues to create standard and simple lighting designs in her role. However, **she has a desire to push her clients to do greater things.**

Key Lighting Drivers / Benefits

Must See It Installed

• She has the most knowledge about lighting and advanced lighting controls. She is not willing to try something new unless she has seen/experienced it firsthand.

Specifically Tailored to Client Needs

 Although she might have a desire to create more innovative designs, the client need is the focal point of her choices.
 Budget is the driving factor for the client.

Enhancing the End User Experience

• She prefers a healthier/smarter building and her goal is to enhance the aesthetic experience of the people in the building.

The "Showy" Products

• She is thrilled about the technology available and is drawn to the more dynamic and modern lighting. These are products that she is rarely able to incorporate, they are more aspirational.

Primary Influencers

Manufacturing Reps

• She trusts the knowledge and heeds the advice of manufacturing reps as her most reliable resource.

Contractors, Electricians

• She works closely with contractors and electricians and is impacted by their perspective and experience. They perform the actual installation of her designs.

Local Events & Conferences

• She sees an event like the Seattle Lighting Summit as an opportunity to connect with local reps and experience new trends in the industry.



Group #3

Lighting Designers | Architects

Tensions

The following tensions were articulated to represent the Lighting Designers | Architects:

- My desire to create an ideal experience does not match up with the parameters I am given by my clients.
- I feel like my creativity is stifled because I am forced to adhere to prescriptive code. It sets limitations & holds me back from what I really want to design.
- I'm an artist who can't release my full creativity for a variety of reasons. Cost/budget are one specific area that restrict me from creating the space that I desire.
- I need to see the evidence/proof of a new product or system succeeding before "taking the risk" on it. Hearing about or reading about a new product is not good enough for me.
- I lack control over final decisions and I wish that my clients understood why they should follow my recommendations.
- I don't have the time that I used to when I design. The world is faster now and I am always running on a tight schedule.
- The lights/lighting systems that I want to spend my time designing are not the ones that match my client's needs. I do not have as much fun designing the same prescribed solutions again and again.

Key Insights/Findings

Designers/Architects Know Their Industry

• The Lighting Designers/Architects were knowledgeable, expressive and creative individuals. The overwhelming amount of information brought by working with many products, restrictions and codes did not phase these designers. They had vast experience with commercial buildings and enjoyed their line of work (despite frustrations with the changing landscape of the industry). They worked directly with clients to choose specific lighting systems and design in accordance with their desires. The Designers/Architects' knowledge of the industry gave them more power to influence choices when it came to lighting system decisions.

Knowledge of The Code

• These individuals were very familiar with the code and what it required when working on commercial buildings. This is a major advantage over the other groups who were highly unaware of the restrictions required by code. In contrast to the first two groups who did not focus on lighting - these folks knew the "ins-and-outs" of lighting and advanced lighting controls.

Creative Minds Stifled

• These creative professionals had the desire to let their minds run free when it came to designing lighting systems in commercial buildings. Their aspirations were admirable and innovative. Unfortunately, the reality of their industry did not let them flex their creative muscles to the extent that they would have liked. Of course, financial budgets restricted them from many potential opportunities with lighting, but it was very strict code that left them feeling challenged to find creative freedom. Their desire to be forward thinking was nullified by the reality of their circumstances. This truth continuously brought them back to products that they had used in the past.

The (Construction) Timing Issue

• There has been a shift in the industry in recent years as the time needed to plan and construct a building has become much shorter. Designers find themselves rapidly submitting building design for projects that will not be completely built for 2-3 years, or for buildings being retrofitted for short term leases. As a result, fast pace and early adoption will continue to be a problem with designers.

Key Insights/Findings

Before I Build It...I Need to See it

• Closely tied to the issue of construction timing (above) is the fact that these designers want to see and experience lighting systems first-hand before they are willing to consider installing them in their own buildings. They understandably want to feel comfortable with the product and the outcome before they recommend it. However, since they are submitting building design with such quick turnaround, it will be difficult for designers to see newer lighting options (such as LLLC) in existing buildings and implement them in their own buildings with confidence. Moreover, this will prevent other designers from seeing/experiencing new lighting options in their buildings. This is a dilemma that threatens fast paced adoption for a system like LLLC.

Creating an Experience for the End User

• The strong desire of this group was to create a perfect experience for the people who entered into their buildings. They believed that a perfect experience could go one of two ways: 1) complete captivation of the end user with a beautiful lighting display, or 2) so well designed that a person would not think about the lighting at all because it fit. The Designers/Architects genuinely desired to create these types of experiences in their buildings, and it was disappointing to them when they were restricted or unable to do so with their designs.

Industry Influencers (Reps)

• These people were primarily influenced by the manufacturer reps. They turned to reps for information, trusted their advice and utilized their knowledge to find lighting options at particular price points. This particular group also utilized conferences as an opportunity to connect with local reps and come across new information.

The Opportunity to Educate Clients

• This group of designers felt limited in their ability to create exciting lighting designs, in part, because their clients were not familiar or comfortable with more creative/complex systems. There is an existing opportunity to educate clients to help promote advanced lighting & controls. "As clients get smarter we can do more advanced things for them."

Messaging Idea Starters

Messaging Opportunities

- Highlight that they will not spend as much time designing and installing the functional side in the LLLC system. They will enjoy designing the layout and reduce the other stress.
- Emphasize the unlocked creativity for designers within the guardrails of code.
 - i.e. LLLC's low watt/ft² allows for more creative, higher watt/ft² lighting to be installed in high visibility areas such as the lobby while still meeting code.
- Position as a product that will provide a positive end user experience they can be proud of:
 - Ultimate functionality and customization.
 - Intuitive control that enables users to not waste their time flipping switches.
- Show that the benefits of LLLC will create coverage from up front costs and be a good long term investment.
- · Benefits to focus on:
 - Ease of installation
 - Customization
 - Long term energy efficiency savings

Tactical Opportunities

- Case studies on projects are currently in progress for LLLC systems. These are an important focus as **this group** needs to have physical evidence that compels them to consider a product like LLLC.
- As a subset of advanced light controls, **the LLLC could use a new name and identity** to distinguish itself from the extensive list of brands available and then comfortably marketed.
- Educate the lighting designers through reps to be more aware of advanced control options.

Thank You.

This report represents the refined insights from the sessions that took place in 2016 on November 9-10, but we'd love to share any of the finer points, details, nuances, and additional context; anything that might help you in your work.



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APPENDIX

- A. Additional Stakeholders + Stakeholder Roles
- B. Stakeholders Activity Worksheets

APPENDIX A

Additional Stakeholders + Stakeholder Roles

Appendix A

Additional Stakeholders + Roles

Group #1*

Primary Property Owners | Financial Decision Makers on a Commercial Lighting Project

- · Owner / Partners / Investors / Board Members
 - Formally approve, budget and share opinion
- Property Manager
 - Research, determine desired results and share opinion
- Electrical Contractor / Electricians
 - Advisor, provide expertise and manage installation
- Lighting Stores + Websites
 - Provide equipment (based on value and timing)
- Engineers
 - Knowledge of codes + technical support
- Real Estate Brokers/Managers
 - Recommend current trends or experience reviews
- · Tenant
 - Opinion

*Representative of worksheets filled out during groups. Respondent answers synthesized.

Group #2*

Primary Property Managers | Decision Makers & Influencers on a Commercial Lighting Project

- Portfolio Mgr. / Property Mgr. / Facilities Mgr.
 - Outline desired specs, identify product options, build comparison model, research and recommendation,
- · Owner / Board of Directors
 - Hear proposal from property manager, make financial decision and formally approve
- · Lead Electrician / General Contractor
 - Bid on project, installation, recommend option and equipment, apply for rebates
- Utility Company
 - Review/approve rebate, expense reimbursement
- Supplier
 - Supply materials, offer lighting selections to compare
- Design Team
 - Vet costs, estimate value, design layout
- Accountant
 - Budget

Appendix A

Additional Stakeholders + Roles

Group #3*

Lighting Designers / Architects, Decision Influencers, who have worked on Commercial Lighting Projects

· Architect / Lighting Designer

Design and draft for space, select fixtures, project management

Owners

 Direct on project scope, approve budget, project direction, approve fixtures, final selection

· Lead Electrician

Installer,

General Contractor

• Builder, purchase the fixtures, install them per drawing

· Reps & Manufacturer

Supply fixture samples, literature, finish samples

• Engineer

 Produce the lighting calculations, prepare lighting plans, coordinate switching

^{*}Representative of worksheets filled out during groups. Respondent answers synthesized.

APPENDIX B

 $Stakeholders\ Activity\ -\ Worksheets$

Name: WLBB BOULE

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? PAR frent INVESTORE, ELOCTHER STORES, ENGINEER
What was their occupation? Renc (5/1/2 + ANGI Com Businesses (ventors)
Who was involved? PARTIMENT (NUESTORE, ELOCTRICIANS, LIGHT, RUS TONES, ENGINEER) What was their occupation? Res (Cosporte + ANCILLONG BUSINESSES (VERNIS) What was their role? Provide Expertice and Gustily work of The Best Volume
Who was involved? Pan Taxons lives by
What was their occupation? ACRECIMENTON PROJECT
What was their role? Forms L APPNOVA L
Who was involved? + Attes fore Elec pitings
What was their occupation? INSTAULTON ESTIMATE OF ELECTRICIAN
What was their role? Provide Expent assistance
Who was involved? LIGHTING STONES & WEBSITES What was their occupation? SELLING CY FINGUS
What was their role? To Province Equipment - Value o Truckly
Who was involved? Entireden
What was their occupation? To PESIUN System AND
What was their role? Pecanner D Reguine neith to Meet broad a Copes
Who was involved? RUAL ESTATE Brokens & Monatours
What was their occupation?
What was their role? Recommend Consoul Thems & Expenience REVIEW
Who was involved?
What was their occupation?
What was their role?

Name: James

Activity #1

Group: Commercial #/

Who was involved in your process of purchasing a new lighting system?

Who was involved? Muself
What was their occupation? Property owner + manager
What was their role? Decision maker
Who was involved? <u>Electrical Contractor</u>
What was their occupation? Contractor / Superisor
What was their occupation? Contractor Superisor What was their role? Advisor + Hands-on Project Superisor
Who was involved? Friends - Other property owners
What was their occupation? Engineering - Property mars
Who was involved? <u>Friends</u> - Other property owners What was their occupation? <u>Engineering</u> - <u>property</u> mgrs. What was their role? <u>management</u> - technical support
Who was involved? They ily
What was their occupation? Advisors — Co-owners
What was their occupation? Advisors — Co-owners What was their role? Co-owner — opinion offerers
y
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

Name: Muly

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? 1 cual, supplies thop Man, Electuren
What was their role? All Alace cached A Comments
What was their occupation? What was their role? Ho proceed with Eff of proceed with the state of the state
Who was involved? That ment and the about 11
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
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What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

Name: Steve

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? Other owners / board members, consultants
What was their occupation? lawyer, architect, school director
What was their role? Input regarding desired results, budgeting
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

Name: MWOODWARDUN Activity #1

Group: ___

Who was involved in your process of purchasing a new lighting system?

Who was involved? Merdy Warowy
What was their occupation? Property Managet
What was their role? Final dicision maken - I paid for the work on behalf of the owner, appen for hebates
Who was involved? B36 Property Maintenance
What was their occupation? Euction of the Contractor
What was their occupation? <u>treathing and french and contractor</u> What was their role? <u>Bid on project, performend equipment, installation</u> Opply for hebates
Who was involved? Puget Sound Enchange
What was their occupation? Wility Company
What was their occupation? Wility company What was their role? heview papproval of herate expense heimbursement
Who was involved? Month wast highing
What was their occupation? Swyrligh
What was their role? Supply mutchials for hetrofit
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

Name: Arthur King

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? Owner maintenance Mr. Kill
What was their occupation?
What was their role? Final say
Who was involved?
What was their occupation? Droporto Menace
What was their occupation? Proporty Manager What was their role? Research & recommendation on the type of history to install
Who was involved? Mantenance Mr. Lee
What was their occupation? Mantenance
What was their role? Advisory on what lights to install & their fature mantenance requirements.
requirements.
Who was involved? Mc Park
What was their occupation? Contractor / Electrician
What was their role? Bidding + install
Who was involved? Mrs Kuran
What was their occupation? Augustant
What was their role? Making sure one install is at a certain budget
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

Activity #1 Group: 12pm

Who was involved in your process of purchasing a new lighting system?

Who was involved? MySelf
What was their occupation? Not far-profit fundations; Property Uns
What was their role? Reast Pessach, Drie Saviay, 5485 Saving Plan
Nerseen Project by Phrax Start to Inist, ordered of Supplied present
Who was involved? President of fundation months
What was their occupation? President Not for Orat un Actor
What was their role? hearing my proposal
Who was involved? Roard of Directors
What was their occupation? Were seen annual Analyst of foundations
What was their role? algadin what Papital Expense to be Sount
Der annul War accepting Disposal from Property Warrager
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

Name: thilp

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? MYSELF
What was their occupation? Property Management / Asset Management
What was their role? <u>locate</u> Sources, Build Companion Model, Make Reccomendation
Select options
Who was involved? Portfolio Manager
What was their occupation? Regiona \ Muneger
What was their role? Approve Scheetion of on-site manager, Approve expense,
Approve vendor
Who was involved? Installation -
What was their occupation? Elcetrical Vendur
What was their role? Safety, Install, Finishal Product
Who was involved? SUPPITER
What was their occupation? AD Supply, Home Geret, Lower, or Catalog
What was their occupation? AD Supply Home Clope To Lower, or Catalog What was their role? Other Selections for Property Manager to compare Ship product - granatee arrival
Ship product - quarantee arrival
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?
Who was involved?
What was their occupation?
What was their role?

AT.	
Name:	
	_

Activity #1

Group:	

Who was involved in your process of purchasing a new lighting system?

Please take a few minutes to write Vanety
Who was involved? Myself & the Government (Nary) What was their occupation? What was their role? The ped me fuerlitate installing the lighting as well as who did.
Who was involved? Myself & Comparise Company
What was their occupation? D. I A L
What was their role? we discussed the budget & specific items
Who was involved? Myself & Conerate Company
What was their occupation? Ceneral
What was their role? Placement of
Achvity # 2 Navy
Who was involved? Myce H
What was their occupation? Creneral Contractor
What was their role? Our saw subis and worked directly with Wary
9
Who was involved? Navy
What was their occupation? US Government Reg
What was their role? Over suw me
What was their occupation? Electrical Congary What was their solo? An an in the top of the solo of th
What was their occupation? Electricizes
What was their role? _ hastalled items
Mhaa :a.a.l.a.d?
Nho was involved?
What was their occupation?
Nhat was their role?

Name: PANIT

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? Me
What was their occupation? Portfolio Man
What was their role? Final decision on options
Who was involved? Facilities Mgr
What was their occupation? Fac. Myn
What was their role? Weigh options vased on efficiency eatheries longerity / cost
Who was involved? Lead Electrian
What was their occupation? Lead Eleaf.
What was their role? Companie options for dunablisty IPM concerns/ longeritity
Who was involved?
What was their occupation? GEN CONT.
What was their role? Review options presented weighted against budget/fit/
Acquest
Who was involved? Design Team
What was their occupation? Design layout of phote t
What was their role? Wet cost, establic value, design, functionality
Who was involved? Prop mant
What was their occupation?
What was their role? Outline spees dessined
Who was involved?
What was their occupation?
What was their role?
924-930

Name: Bozarth Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? Me
What was their occupation? Architect
What was their role? Tesigner
Who was involved? the force Terry Jenson
What was their occupation? Electrical Contractor
What was their role? Consultant
Who was involved? Tom Lake
What was their occupation? Pastor
What was their role? () izut
Who was involved? Ron Sabar
What was their occupation? Contractor
What was their role? Builder
Who was involved? Steve Butter Field
What was their occupation?
What was their role? Research
Who was involved? Crzig Anderson
What was their occupation? (Electrician
What was their role? 1/15teller
Who was involved?
What was their occupation? Milkman
What was their role?

Name: Nanny L.

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved? Nav	MULL INTERIOR DESIGNER
milai was mon occopanon	/
What was their role?	Select fixtures, specify Them
Who was involved?	Owner
What was their occupation	?CEO
What was their role?	Approve the direction of the lighting & the final Selections
	final selections
Who was involved?	intern
What was their occupation	? designer
What was their role?	document the kep plans, code the specified fixtured
	specified fixturd
Who was involved?	Rep.
What was their occupation	? Various lighting lines
What was their role?	Various lighting lines supply tixture samples, literature, finish samples
Who was involved?	Contractor
What was their occupation	? builder
What was their role?	purchase the fixtoris, install them per the drawing
	the drawing
Who was involved?	Engineer
What was their occupation	
What was their role?	produce the lighting calculations
	produce the lighting calculations sprepare lighting plans & coor dinate smitching facture
Who was involved?	mand facture
What was their occupation	
What was their role? $_{p}$	rovide information on the textures
1	

Name: Narry Thompson

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

What was their role? Design & Draft for spaces - all phases
Who was involved? Owner: typically another Interior Dosigner What was their occupation? Project Manager What was their role? To direct me(designer) on scope of project
What was their role? To receive plans, make & order revisions
Who was involved? <u>Title 24 Engineer</u> What was their occupation? <u>Engineer Lighting control per Ca. Bldg</u> What was their role? <u>Create To4 docs.</u> for construction set Code ** Dermit
What was their occupation? What was their role?
What was their occupation?
Who was involved?

Name: Erica Zar

Activity #1

Group:

Who was involved in your process of purchasing a new lighting system?

Who was involved?	Interior/Architect designer (me)
What was their occupation?_	Building Wargement
What was their role?	Project management
Who was involved?	Interior/Architect designer (Me)
What was their occupation?_	
What was their role?	Bulding owner (ost of design & fixture (okaying)
Who was involved?	Internal Arrichtect designer (me)
What was their occupation?_	Broker
What was their role?	Pricing for design & leasing
Who was involved?	Interior/Architect designer (We)
What was their occupation?_	tated clean room lab
What was their role?	Design build
Who was involved?	Interior / Arichitect designer (mc)
What was their occupation?_	School board
What was their role?	facilities manager
	O
Who was involved?	
What was their occupation?_	
What was their role?	
What was their occupation?_	
What was their role?	