Final Report

ELI PHILIPPINES
POINT-OF-SALE SUPPORT CAMPAIGN

(First Wave: September 2001 to January 2002
Second Wave: April 2002 to August 2002)

29 January 2003

Prepared by

Infinite Ideas, Inc.

Under the

IFC/GEF
EFFICIENT LIGHTING INITIATIVE – PHILIPPINES
PROGRAM

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ELI engaged the events management agency Infinite Ideas to assist in implementing the project based ELI's POS Support Campaign activity. ELI provided research inputs particularly on the Metro Manila retail market for lighting products.

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TABLE OF CONTENTS

1.0 Background

The Efficient Lighting Initiative (ELI) Program is focused on raising consumer awareness on the benefits of efficient lighting in the Philippines. The Point-of-Sale Support Campaign was conceptualized to penetrate three different markets where ELI-qualified compact fluorescent lamps (CFLs) are available: the small- and medium-scale mom and pops stores, the large scale supermarket stores, and the upscale hardware stores within malls and department stores. The Metro Manila area was divided into five geographical areas, as follows:

- Area 1 (Caloocan, Malabon, Navotas and Valenzuela)
- Area 2 (Quezon City, Mandaluyong, Pasig and San Juan)
- Area 3 (Makati, Manila and Pasay)
- Area 4 (Marikina, Taguig, Pateros and Rizal)
- Area 5 (Muntinlupa, Cavite, Las Piñas and Parañaque)

The first wave of the campaign, which was held from September 2001 to January 2002, had three major objectives:

1. To create awareness among hardware owners and their sales staff as well as consumers regarding the ELI Quality mark by conducting a comprehensive survey through questionnaires and the structured interview method.

2. To enhance awareness of those who are already familiar with ELI quality mark.

3. To be able to impart the benefits and advantages of ELI qualified compact fluorescent lamps.

The Point-of-Sale (POS) Specialists conducted a background survey during this first wave campaign. For the initial visit, two teams of five specialists each were assigned to different geographical areas wherein they were tasked to interview and educate all hardware store and supermarket staff about the ELI concept and the qualified CFL products. POS collaterals were distributed and installed in the visited hardware stores. This method was used throughout the first wave campaign over a period of five months. The POS Report for the First Wave Campaign is found in the Appendix of this report.

In order to reinforce the education campaign in the commercial sector, one month was dedicated solely to Vendor Education Seminars held in each of the five geographical divisions. During each seminar, a comprehensive overview of ELI was presented to the hardware store staff/management.

Following the Vendor Education Seminars, a second wave of the POS Campaign was held from April to August 2002, covering the same geographical areas of Metro Manila, so that a new survey could be taken to assess the level of market awareness resulting from the entire media campaign—PRAAC and the First Wave POS Campaign.
The objectives of the second wave were two-fold: to replenish the POS materials and to conduct a follow-up survey. A result of the survey would be the discovery of other barriers limiting the sale of ELI-qualified CFLs in the local market.

For the second wave, one team of five specialists revisited the same hardware stores as in the first campaign. The task was completed in a five-month period.

2.0 Summary

This Final Report of the POS Campaign documents all of the results obtained during the second wave of the below-the-line activity. Various tables outline the survey responses. In summary, the following questions were answered by the hardware store staff/interviewees:

Q1. How many hardware stores are selling CFLs?
Q2. How many of those hardware stores, which are selling CFLs, are selling ELI-qualified CFLs?
Q3. For those hardware stores that are not selling ELI-qualified CFLs, how many are willing to sell?
Q4. Among the hardware stores that sell CFLs, how many stores are carrying the following brands?
Q5. What do hardware store owners/salesclerks understand about the meaning of ELI?
Q6. Is there any increase in the number of people looking for CFLs?
Q7. Is there an increase in number of customers asking about and buying ELI-qualified CFLs?
Q8. Which of the collaterals given to the hardware stores helped them in explaining ELI and/or selling ELI-qualified CFLs?
Q9. In what way did the ELI-POS collaterals assist the hardware stores?

The following significant data was determined from the two waves of the POS Campaign:

- Number of hardware stores visited in Metro Manila

Number of hardware stores visited	
First Wave	**Second Wave**
1972	1989

- Number of hardware stores selling CFLs

Number of hardware stores selling CFLs	
First Wave	**Second Wave**
1597	1505

- Number of hardware stores selling ELI-qualified CFLs

Number of hardware stores selling ELI-qualified CFLs		
First Wave	**Second Wave**	**Percentage Increase**
492	1043	112%

- Consumers' Awareness of CFLs (based on interviews with hardware store staff during 2nd Wave)

Response	Percentage
Yes there is an increase	83%
No change	10%
There is a slight increase	4%
Do not know	3%

- Consumers' Awareness of ELI-qualified CFLs (based on interviews with hardware store staff during 2nd Wave)

Response	Percentage
Yes there is an increase	63%
No change	8%
There is a slight increase	2%
Do not know	2%

- Hardware store staff's Understanding of ELI

Response	Percentage
ELI means higher quality / durability / longevity / safety/ better illumination (brighter) / product warranty	32%
ELI means savings / benefits	27%
ELI is understood but no explanation was given	22%
ELI is a brand name	5%
ELI is a program / standards organization	4%
ELI is a generic lighting product / technology	1%
Commercials / lighting product endorsed by Michael V.	0.6%
ELI means authentic CFLs	0.5%
ELI is a quality mark / standard	0.1%
Expensive	0.1%

- Commercial Awareness of ELI

First Wave	Second Wave
27%	85%

Table 1 provides a summary of the second wave campaign performance coverage.

Table 1

Summary of Second Wave POS Campaign

From April to August 2002

AREA	Number of Hardware Stores								Materials Distributed/Installed						
	No. of HW 1st Wave	No. of HW 2nd Wave	W/ CFL		W/ ELI		W/o CFL		Standees	Flyers	Product list	Mobiles	Pointers	Stickers	Testers
			1st Wave	2nd Wave	1st Wave	2nd Wave	1st Wave	2nd Wave							
AREA 1															
Caloocan	126	129	64	94	12	55	62	35	39	9551	2474	187	65	102	22
Malabon	60	60	43	45	6	19	17	15	0	2846	797	30	16	20	5
Navotas	21	34	18	23	6	14	3	11	0	1708	533	57	19	29	9
Valenzuela	89	99	52	72	16	47	37	27	0	4678	1185	93	54	78	14
AREA 2															
Mandaluyong	38	35	31	29	12	22	7	6	0	132	643	39	65	2	2
Novaliches,Q.C.	84	85	75	68	28	49	9	17	30	6010	1727	169	58	100	15
Pasig	262	79	242	67	109	42	20	12	0	116	808	83	60	25	7
Quezon City	72	269	65	205	22	167	7	64	7	1496	1182	227	116	176	31
San Juan	14	21	11	19	5	14	3	2	0	41	60	9	3	9	0
AREA 3															
Makati	103	96	83	75	25	54	20	21	0	309	415	105	43	106	13
Manila	276	277	230	212	74	152	46	65	0	5001	1845	136	74	121	21
Pasay	77	76	53	56	6	39	24	20	0	223	238	70	20	80	8
AREA 4															

AREA	Number of Hardware Stores								Materials Distributed/Installed						
	No. of HW 1st Wave	No. of HW 2nd Wave	W/ CFL		W/ ELI		W/o CFL		Standees	Flyers	Product list	Mobiles	Pointers	Stickers	Testers
			1st Wave	2nd Wave	1st Wave	2nd Wave	1st Wave	2nd Wave							
Marikina	70	63	58	51	24	41	12	12	0	120	258	64	46	44	9
Pateros	68	5	56	3	4	1	12	2	0	8	20	0	0	0	0
Angono,Rizal	7	11	5	9	0	6	2	2	0	20	50	0	0	0	0
Antipolo, Rizal	9	100	9	68	3	42	0	32	0	158	395	32	27	16	0
Baras, Rizal	98	4	71	2	17	2	27	2	0	6	15	7	6	2	0
Binangonan, Rizal	4	23	4	18	2	10	0	5	0	32	75	8	6	4	0
Cainta, Rizal	24	62	21	41	2	24	3	21	0	86	221	23	20	14	1
Cardona, Rizal	64	5	45	4	10	4	19	1	0	10	3	12	9	6	0
Montalban, Rizal	6	16	6	10	0	10	0	6	0	24	60	28	21	14	5
Morong, Rizal	13	10	12	5	5	5	1	5	0	16	5	0	0	0	0
Pililla, Rizal	10	3	10	2	0	1	0	1	0	6	0	0	0	0	0
Rodriguez, Rizal	3	7	3	4	0	4	0	3	0	8	20	8	6	4	2
San Mateo, Rizal	7	31	7	24	4	21	0	7	0	57	126	45	35	20	5
Tanay, Rizal	31	8	30	7	20	3	1	1	0	12	15	0	0	0	0
Taytay, Rizal	8	38	8	29	0	17	0	9	0	56	140	8	9	6	0
Teresa, Rizal	37	8	35	4	0	3	2	4	0	10	25	4	3	2	0
Taguig	6	66	5	44	0	29	1	22	0	134	310	34	23	10	0
AREA 5															
Cavite	112	109	97	79	30	54	15	30	0	203	307	105	35	105	32
Las Piñas	46	41	38	37	8	22	8	4	0	70	105	57	19	58	19
Muntinlupa	44	41	43	36	16	23	1	5	0	70	104	65	21	63	21

AREA	Number of Hardware Stores								Materials Distributed/Installed						
	No. of HW 1st Wave	No. of HW 2nd Wave	W/ CFL		W/ ELI		W/o CFL		Standees	Flyers	Product list	Mobiles	Pointers	Stickers	Testers
			1st Wave	2nd Wave	1st Wave	2nd Wave	1st Wave	2nd Wave							
Parañaque	83	78	67	63	16	47	16	15	0	147	210	113	42	107	29
Totals	1972	**1989**	1597	**1505**	492	**1043**	375	**484**							
Materials used									76	33364	14371	1818	921	1323	270
Materials Inventory after 1st Wave									76	34236	27145	2490	2472	1389	270
Materials Inventory after 2nd Wave									0	872	6222	672	1551	66	0

From April to August 2002, the POS Specialists revisited a total number of **1,989** hardware stores. This covered Areas 1 to 5, which included several upscale hardware stores.

Out of the 1,989 hardware stores revisited, the POS Specialists found that there are **1,505 (76%)** hardware stores which are selling compact fluorescent lamps, with a total of **1,043 (69%)** of those stores selling ELI-qualified CFLs. The remaining 484 (24%) do not sell compact fluorescent lamps, this number includes those hardware stores which are now closed and/or have changed their line of business.

As of 03 September 2002, 72 (4%) out of the 1,972 hardware stores visited during the 1st Wave were closed (6 stores in Area 1, 15 stores in Area 2, 15 stores in Area 3, 31 stores in Area 4 and 5 stores in Area 5).

Table 2 below shows the list of hardware stores that have shifted their line of business. A total of 27 (1%) hardware stores changed their line of business (2 stores in Area 1, 5 stores in Area 2, 8 stores in Area 3, 10 stores in Area 4 and 2 stores in Area 5).

Table 2

List of Hardware Stores with New Business Lines

	Name of Hardware Store	New Business Line	Location
1	Arpee's General Merchandise	Grocery store	Caloocan City
2	CEZ'S General Merchandise	Surplus and industrial machines	Valenzuela City
3	Mandaluyong Lumber	Lumber	Mandaluyong City
4	M. Cruz Contractor	Motor pumps	Novaliches, Quezon City
5	Ralph Vincent Commercial	Hardware supplies	Novaliches, Quezon City
6	N.C.R. Store or Uniwatch General Merchandise	Electric fan supplies	Pasig City
7	Indian Tree	Beauty parlor	Quezon City
8	Gen-Lax Merchandise	Car-air-conditioning	Makati
9	Irwin Hardware	Industrial materials	Makati
10	John Jowell Trading	Cement, gravel and sand	Makati
11	Bing Sin Hardware	Plumbing	Manila
12	Fourwinds Commercial	Plumbing	Manila
13	High Rise Commercial	Electrical materials	Manila
14	Powercom Enterprises	Mobile phones	Manila
15	Prosperity Hardware	Plumbing	Manila
16	Aida Sanado	Warehouse	Rizal
17	Electro	Cannot be found	Rizal
18	F.M.C. Coco Lumber	Lumber	Rizal
19	Micron Enterprises	Paints	Rizal
20	A.S. Herrera	Furniture	Rizal
21	Eastwind Construction Supply	Industrial material	Rizal
22	Tripower	Wholesale goods	Rizal
23	Agnus	Glass materials	Rizal
24	Sunlight Builders	Closed	Rizal
25	Coral Hardware	Grocery store	Rizal
26	Four Star Marketing Corporation	Industrial material	Parañaque
27	N.S.R. Trading	Container drums	Parañaque

There were various sizes of hardware stores encountered during the campaign. Provided below are definitions of the hardware store classifications:

- *Small-sized hardware store* - single unit; usually non-air-conditioned; rented; usually has a one column-bay frontage (3-5 meters each column-bay).

- *Medium-sized hardware store* – has a frontage of at least two column-bays; usually non-air-conditioned.

- *Large-sized hardware store* – has a frontage of at least three column-bays, many of them have a small stockyard or a small warehouse behind the stores. Supermarkets are included in the large classification.

- *Unidentified hardware stores* - these are stores which cannot easily be distinguished as small, medium or large but are definitely not upscale.

- *Upscale hardware stores* usually lease space in upscale commercial malls, and are usually fully air-conditioned. Many of these upscale hardware stores are home improvement centers and mostly *do-it-yourself* stores.

Out of 1,989 hardware stores revisited, there were 1,051 (53%) medium-sized hardware stores, 463 (23%) small-sized hardware stores, and 432 (22%) large hardware stores. A total of 21 (1%) of upscale hardware stores were also visited.

Table 3

Hardware Stores Visited by Classification

Classification	**No. of Hardware Stores**	**Percentage**
Medium-sized	1,051	52.80%
Small-sized	463	23.30%
Large-sized stores excluding the upscale	432	21.70%
Unidentified	22	1.10%
Upscale	21	1.10%
TOTAL	**1,989**	**100.00%**

3.0 Summary of Survey

This is a summary of the results of the survey performed during the second wave of the POS visit. In order to determine the market awareness about ELI, the POS Specialists revisited all hardware stores visited during the first wave.

Q1. How many hardware stores are selling CFLs?

Table 4

Hardware Stores Selling Compact Fluorescent Lamps

Response	No. of Hardware Stores	Percentage
Selling CFLs	1,505	75.70%
Not selling CFLs	484	24.30%
TOTAL	**1,989**	**100.00%**

The POS Specialists found **1,505 (76%)** hardware stores that were selling compact fluorescent lamps. The remainder is composed of those hardware stores that closed, changed business or have never sold CFLs.

Q2. How many of those hardware stores, which are selling CFLs, are selling ELI-qualified CFLs?

Table 5

Hardware Stores Selling ELI-qualified CFLs

Response	No. of Hardware Stores	Percentage
Selling ELI-qualified CFLs	1,043	69.30%
Not selling ELI-qualified CFLs	462	30.70%
TOTAL	**1,505**	**100.00%**

From the 1,505 hardware stores that are selling compact fluorescent lamps there are **1,043 (69%)** that sell ELI-qualified products.

Q3. For those hardware stores that are not selling ELI-qualified CFLs, how many are willing to sell?

Table 6

Hardware Stores Which Are Willing To Sell ELI-qualified CFLs

Response	No. of Hardware Stores	Percentage
Willing to sell	101	21.90%
Not willing to sell	361	78.10%
TOTAL	**462**	**100.00%**

Out of 462 hardware stores that are not selling ELI qualified compact fluorescent lamps, there are 101 (22%) hardware stores that are willing to sell ELI-qualified compact fluorescent lamps.

Q4. Among the hardware stores that sell CFLs, how many stores are carrying the following brands?

When the POS specialists asked the respondents what brands of CFL are being sold in their stores multiple answers were given. Table 7 shows the various CFL brands being sold.

Table 7

Brands of Compact Fluorescent Lamps

Brands	No. of Hardware Stores Selling CFLs by Brand	Percentage
Philips	1,113	73.95%
GE	296	19.67%
Osram	84	5.58%
National	76	5.05%
Eurolux	72	4.78%
Omni	72	4.78%
Firefly	61	4.05%
Sunlight	51	3.39%
Cydi	46	3.06%
Energy Saving	37	2.46%
Cata	30	1.99%
Ultralamp	22	1.46%
Neolux	20	1.33%

Brands	No. of Hardware Stores Selling CFLs by Brand	Percentage
Maxlite	13	0.86%
Okes	13	0.86%
Xindeco	12	0.80%
Diamond	11	0.73%
Golden Power	11	0.73%
Xingxing	10	0.66%
Lux	9	0.60%
Pollux	9	0.60%
Hitachi	7	0.47%
Toshiba	7	0.47%
Real	6	0.40%
U-Light	6	0.40%
Apollo	5	0.33%
Juren	5	0.33%
Kefay	5	0.33%
Neoball	5	0.33%
Delta	4	0.27%
Energy	4	0.27%
Philites	4	0.27%
Clear 2000	3	0.20%
Ikilamp	3	0.20%
Inbur	3	0.20%
Kenzo	3	0.20%
Astralux	2	0.13%
Commander	2	0.13%
FLP Electronic	2	0.13%
Genie	2	0.13%
Hengxing	2	0.13%
Luxram	2	0.13%
Megaman	2	0.13%
Superlux	2	0.13%
U-land	2	0.13%
Unilight	2	0.13%
3A Electronics	1	0.07%
Akan	1	0.07%
Akari	1	0.07%
Apolebo	1	0.07%
Compact	1	0.07%
Dab	1	0.07%
Ecolamp	1	0.07%
Elesa	1	0.07%

Brands	No. of Hardware Stores Selling CFLs by Brand	Percentage
Erlamp	1	0.07%
Gumlite	1	0.07%
Hangxing	1	0.07%
Jet	1	0.07%
KCS	1	0.07%
Kawasaki	1	0.07%
Liberty	1	0.07%
Maximizer	1	0.07%
Meibao	1	0.07%
Mini Quad	1	0.07%
Mitsubishi	1	0.07%
Motorolamp	1	0.07%
Polly	1	0.07%
Powerlight	1	0.07%
Sandy	1	0.07%
Sansui	1	0.07%
See	1	0.07%
SPC Lamp	1	0.07%
Splendor	1	0.07%
U-well	1	0.07%
Xanebo	1	0.07%
Zet	1	0.07%

Q5. What do hardware store owners/salesclerks understand about the meaning of ELI?

Table 8

Commercial Awareness of ELI

Response	No. of Response	Percentage
ELI means higher quality/ durability/ longevity/ safety/ better illumination (brighter)/ product warranty	629	31.62%
Eli means savings/ benefits	540	27.15%
ELI is understood but with no explanation	438	22.02%
ELI is a brand name	107	5.38%
ELI is a program/ standards organization	79	3.97%
ELI is a generic lighting product/ technology	23	1.16%
Commercials/ lighting product endorsed by Michael V.	11	0.55%
ELI means CFLs are not counterfeit products	10	0.50%
ELI is a quality mark/ standard	2	0.10%
Expensive	2	0.10%

Question 5 had multiple answers. Based on the total number of hardware stores surveyed in the second wave 629 (32%) interviewees knew ELI for higher quality, durability, longevity, safety, better illumination, and product warranty; 540 (27%) respondents knew it for savings and benefits; 438 (22%) understand ELI; 79 (4%) see ELI as a program/standards organization; 10 (1%) know that ELI products are not counterfeits; and a small percentage note that ELI is a standard that means quality.

A total of 1700 (85%) responses can be attributed to the commercial awareness of ELI.

Q6. Is there any increase in the number of people looking for CFLs?

Table 9

Market Awareness of Compact Fluorescent Lamps

Response	No. of Response	Percentage
Yes there is an increase	1241	82.46%
No change	146	9.70%
There is a slight increase	64	4.25%
Do not know	43	2.86%
There is a slight decrease	6	0.40%

From the 1,505 hardware stores that sell compact fluorescent lamps 1,241 (82%) of our interviewees told us that there is an increase in the number of customers who are looking for compact fluorescent lamps in hardware stores, and 64 (4%) note that there is a slight increase.

A total of 1305 (87%) responses can be attributed to the residential awareness of CFLs.

Q7. Is there an increase in number of customers asking about and buying ELI-qualified CFLs?

Table 10

Market Awareness of ELI products

Response	No. of Response	Percentage
Yes there is an increase	943	62.66%
No change	115	7.64%
There is a slight increase	34	2.26%
Do not know	35	2.33%

Out of 1,505 hardware stores that sells compact fluorescent lamps 943 (63%) said that there is an increase in number of customers who are asking about ELI and looking for compact fluorescent lamps with ELI quality mark in their hardware stores, and 34 (2%) note that there is a slight increase.

A total of 977 (65%) responses can be attributed to the residential awareness of ELI-qualified CFLs.

For questions 8 and 9, the figures in the following tables are based on the hardware stores that received POS materials during the first wave campaign and were revisited during the second wave.

Q8. Which of the collaterals given to the hardware stores helped them in explaining ELI and/or selling ELI-qualified CFLs?

Table 11

Collaterals that Helped Explain and/or Sell ELI-qualified CFLs

Type of collateral given	No. of Hardware Stores	Percentage
Flyers	394	39.2%
Standees	219	21.8%
Product List	156	15.5%
Mobiles	104	10.3%
Stickers	103	10.2%
Pointers	29	2.9%

During the first POS campaign the POS Specialists gave out collaterals to all hardware stores that were selling compact fluorescent lamps. This table shows that flyers (39%), standees (22%) and the product list (16%) contributed the most in providing consumers with information about the Efficient Lighting Initiative.

Q9. In what way did the ELI-POS collaterals assist the hardware stores?

Table 12

Finding	No. of Hardware Stores	Percentage
Assisted in explaining about ELI	196	58%
Assisted in selling ELI-qualified CFL	142	42%

One hundred ninety-six (58%) respondents said that the collaterals that were distributed helped the hardware stores explain the ELI Project to their customers, which in the end helped them sell ELI-qualified compact fluorescent lamps.

Final Report

Submitted 17 January 2003

By Infinite Ideas, Inc.

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Appendix

First Wave Report
ELI Philippines Point-of-Sale Support Campaign
(First Wave: September 2001 to January 2002)

1.1. Objectives

1. To create awareness among hardware owners and their sales staff as well as consumers regarding the ELI Quality mark by conducting a comprehensive survey through questionnaires and the structured interview method.

2. To enhance awareness of those who are already familiar with ELI quality mark.

3. To be able to impart the benefits and advantages of ELI qualified compact fluorescent lamps.

Table 1

Summary of First Wave POS Campaign

September 2001 to January 2002

AREA	Number of Hardware Stores	Materials Distributed/Installed											
		With CFL	With ELI	Without CFL	Willing to sell	Standees	Flyers	Product List	Mobiles	Pointers	Stickers	Pictures	Testers
AREA 1													
Caloocan	126	64	12	62	28	267	8232	1609	128	67	246	12	13
Malabon	60	43	6	17	40	33	232	59	10	5	10	0	1
Navotas	21	18	6	3	12	16	200	137	8	8	8	0	1
Valenzuela	89	52	16	37	2	77	925	539	46	14	186	17	15
Bulacan	-	-	-	-	-	6	334	55	9	4	9	-	-
AREA 2													
Mandaluyong	38	31	12	7	14	76	5278	1209	98	197	198	8	18
Novaliches,Q.C.	72	65	22	7	21	84	945	1239	87	233	257	7	26
Pasig	84	75	28	9	32	167	3764	1068	248	327	344	22	7
Quezon City	262	242	109	20	56	389	14512	1479	386	423	406	78	42
San Juan	14	11	5	3	5	27	1690	956	11	7	8	5	7
AREA 3													
Makati	103	83	35	20	32	157	5317	1439	197	82	326	52	21
Manila	276	230	74	46	68	334	8801	1648	192	234	349	39	18
Pasay	77	53	6	24	29	88	291	462	20	12	95	27	-
AREA 4													

AREA	Number of Hardware Stores	Materials Distributed/Installed											
		With CFL	With ELI	Without CFL	Willing to sell	Standees	Flyers	Product List	Mobiles	Pointers	Stickers	Pictures	Testers
Marikina	70	58	24	12	57	83	1053	489	55	52	89	11	11
Pateros	7	5	0	2	7	31	197	115	9	8	8	4	-
Taguig	68	56	4	12	39	-	-	-	-	-	-	-	5
Angono,Rizal	9	9	3	0	0	246	2571	1143	101	48	246	96	36
Antipolo, Rizal	98	71	17	27	31	-	-	-	-	-	-	-	-
Baras, Rizal	4	4	2	0	1	-	-	-	-	-	-	-	-
Binangonan, Rizal	24	21	2	3	12	-	-	-	-	-	-	-	-
Cainta, Rizal	64	45	10	19	8	-	-	-	-	-	-	-	-
Cardona, Rizal	6	6	0	0	0	-	-	-	-	-	-	-	-
Montalban, Rizal	13	12	5	1	0	-	-	-	-	-	-	-	-
Morong, Rizal	10	10	0	0	0	-	-	-	-	-	-	-	-
Pililla, Rizal	3	3	0	0	0	-	-	-	-	-	-	-	-
Rodriguez, Rizal	7	7	4	0	0	-	-	-	-	-	-	-	-
San Mateo, Rizal	31	30	20	1	0	-	-	-	-	-	-	-	-
Tanay, Rizal	8	8	0	0	0	-	-	-	-	-	-	-	-
Taytay, Rizal	37	35	0	2	0	-	-	-	-	-	-	-	-
Teresa, Rizal	6	5	0	1	0	-	-	-	-	-	-	-	-
AREA 5													
Cavite	112	97	30	15	46	238	9871	9826	60	52	54	50	-
Las Piñas	46	38	8	8	31	47	656	476	14	7	12	22	2
Muntinlupa	44	43	16	1	22	75	994	370	35	22	29	22	-
Parañaque	83	67	16	16	29	183	969	769	34	24	29	19	7

AREA	Number of Hardware Stores				Materials Distributed/Installed							
	With CFL	With ELI	Without CFL	Willing to sell	Standees	Flyers	Product List	Mobiles	Pointers	Stickers	Pictures	Testers
Meralco					-	1500	1500	4	4	4	-	-
Meralco Day					-	1187	170	60	1 198	1 950	-	-
Seminar Kits					-	2745	1098	1098	1098	1098	-	-
Total	**1972**	**1597**	**492**	**375**	**622**							
Materials used					2624	72264	27855	2910	2928	4011	491	230
Materials produced					2700	106500	55000	5400	5400	5400	-	500
Remaining materials					76	34236	27145	2490	2472	1389	-	270

The ELI Point-of-Sale (POS) Specialists conducted a decal mounting campaign from September 2001 to January 2002 wherein a total of 1,972 hardware stores in all areas of Metro Manila were visited. Among these hardware stores, 1,597 stores sell compact fluorescent lamps while 375 do not sell any compact fluorescent lamp brand. However, from the 1,597 stores, which do sell compact fluorescent lamps, it was noted that only 492 hardware stores sell ELI-qualified compact fluorescent lamps.

Part of the decal-mounting objective was to create awareness among hardware storeowners and their sales staff about the benefits and advantages of an ELI-qualified compact fluorescent lamp. In doing so, the point of sale specialists distributed information materials which consisted of the following: 72,264 flyers; 27,855 product lists (Pasado leaflets); 2,910 mobiles; 4,011 stickers; 2,928 pointers and 2,624 standees.

For documentation purposes, the POS Specialists were tasked to take pictures of the hardware stores visited. Only 491 pictures of hardware stores were taken because most hardware storeowners would not allow the POS specialists to take photos of their store.

There were various sizes of hardware stores encountered during the campaign. Provided below are definitions of the hardware store classifications:

- *Small-sized hardware store* - single unit; usually non-air-conditioned; rented; usually has a one column-bay frontage (3-5 meters each column-bay).

- *Medium-sized hardware store* – has a frontage of at least two column-bays; usually non-air-conditioned.

- *Large-sized hardware store* – has a frontage of at least three column-bays, many of them have a small stockyard or a small warehouse behind the stores. Supermarkets are included in the large classification.

- *Unidentified hardware stores* - these are stores which cannot easily be distinguished as small, medium or large but are definitely not upscale.

- *Upscale hardware stores* usually lease space in upscale commercial malls, and are usually fully air-conditioned. Many of these upscale hardware stores are home improvement centers and mostly *do-it-yourself* stores.

From the 1,972 hardware stores visited, 51% are comprised of medium hardware stores, 25% are small hardware stores, and 24% are large hardware stores. There were also a small percentage of unidentified hardware stores (0.41%) and upscale (0.30%) stores visited.

Table 2

Hardware Stores Visited by Classification

Classification	No. of Hardware Stores	Percentage
Medium-sized Hardware Stores	1,008	51.12%
Small-sized Hardware Stores	485	24.59%
Large Hardware Stores Excluding Upscale	465	23.58%
Unidentified Hardware Stores	8	0.41%
Upscale Hardware Stores	6	0.30%
TOTAL	**1,972**	**100.00%**

1.2. Summary of Survey

This is a summary of the results of the survey performed during the first wave of the POS visit.

Q1. How many hardware stores are selling compact fluorescent lamps?

Table 3

Hardware Stores Selling Compact Fluorescent Lamps

Response	No. of Hardware Stores	Percentage
Selling CFLs	1,597	80.98%
Not Selling CFLs	324	16.43%
Unsure/ No Response	51	2.59%
TOTAL	**1,972**	**100.00%**

The table above shows that out of the 1,972 hardware stores visited in all areas of Metro Manila, **1,597 (81%)** hardware stores sell compact fluorescent lamps while 16% do not sell compact fluorescent lamps.

Q2. If hardware stores do sell CFLs, what brands do they sell?

When the POS specialists asked the respondents what brands of CFL they sell, the hardware store staff gave multiple answers. Table 4 shows the various CFL brands being sold.

Table 4

Brands of Compact Fluorescent Lamps

Brands	No. of Hardware Stores Selling CFLs by Brand	Percentage
Philips	1271	79.59%
GE	504	31.56%
Osram	209	13.09%
National	120	7.51%
Omni	107	6.70%
Cata	73	4.57%
Eurolux	60	3.76%
Xingxing	45	2.82%
Apollo	44	2.76%
Sunlight	42	2.63%
Xindeco	39	2.44%
Golden Power	35	2.19%
Neolux	26	1.63%
Hitachi	25	1.57%
Toshiba	24	1.50%
Maxlite	19	1.19%
U-Light	14	0.88%
Diamond	12	0.75%
Clear 2000	11	0.69%
Cydi	7	0.44%
Pollux	7	0.44%
Real	7	0.44%
Energy	6	0.38%
Megaman	6	0.38%
Pollylux	6	0.38%
Electro GT	5	0.31%
Ikilamp	4	0.25%
Kenzo	4	0.25%
Astralux	3	0.19%
Galaxy	3	0.19%
Kefay	3	0.19%
Kengo	3	0.19%
Liberty	3	0.19%
Meiguang	3	0.19%
Newlite	3	0.19%
Prismatic	3	0.19%
Sandy	3	0.19%
Sylvania	3	0.19%

Brands	No. of Hardware Stores Selling CFLs by Brand	Percentage
Yasaki	3	0.19%
Asana	2	0.13%
Astralite	2	0.13%
Chiyoda	2	0.13%
Commander	2	0.13%
Ecolamp	2	0.13%
Genstar	2	0.13%
Good Earth	2	0.13%
Lux	2	0.13%
Mitsubishi	2	0.13%
Neoball	2	0.13%
Seiko	2	0.13%
Star	2	0.13%
Sunlux	2	0.13%
Superlux	2	0.13%
2 Pin	1	0.06%
3 Star Electronics	1	0.06%
Akita	1	0.06%
Batji	1	0.06%
Catmizer	1	0.06%
Compact	1	0.06%
Dadi	1	0.06%
Daichi	1	0.06%
Durem	1	0.06%
Economical Lamp	1	0.06%
Edison	1	0.06%
Energy Saving	1	0.06%
Eryl	1	0.06%
First Quality	1	0.06%
Fuze	1	0.06%
Galux	1	0.06%
Gartim	1	0.06%
Hengxing	1	0.06%
Jet	1	0.06%
Junar	1	0.06%
Juren	1	0.06%
K-lite	1	0.06%
Kymco	1	0.06%
Liwanag	1	0.06%
Metro	1	0.06%

Brands	No. of Hardware Stores Selling CFLs by Brand	Percentage
Podilux	1	0.06%
Powerlight	1	0.06%
Progress	1	0.06%
QI	1	0.06%
Sandai	1	0.06%
Sansui	1	0.06%
See	1	0.06%
Taiwan	1	0.06%
Tanglaw Sobo	1	0.06%
Tocoms	1	0.06%
Toyo	1	0.06%
U-Lamp	1	0.06%
Unilite	1	0.06%
Ultralamp	1	0.06%
Ultralux	1	0.06%

Q3. Price range of CFLs being sold.

After asking what different brands were being sold in the hardware stores, the POS specialists also surveyed the price range of these CFLs. The POS specialists found that out of 1,972 hardware stores, 38% sells one CFL unit within the price range of Php100 – 200 (USD2 – 4); 31% of hardware stores sell one CFL within the price range of Php200 – P300 (USD4 – 6).

The table below shows the price range of CFLs being sold in various hardware stores.

Table 5

Price Range of Compact Fluorescent Lamps

Response	No. of Hardware Stores	Percentage
Hardware stores selling below P100 per CFL	413	26%
Hardware stores selling P100 - P200 per CFL	966	38%
Hardware stores selling P200 - P300 per CFL	784	31%
Hardware stores selling above P300 per CFL	402	16%

Q4. Does the hardware store understand the meaning of ELI?

Table 6

No. of Interviewees Who Understand ELI

Response	No. of Hardware Stores	Percentage
Understand	523	26.52%
Does not understand	1,325	67.19%
Unsure/ No Response	124	6.29%
TOTAL	**1,972**	**100.00%**

When the respondents were asked whether they understood the meaning of ELI, 67% said they did not know what ELI is. This is perhaps due to the fact that many have not seen the previous advertising efforts that came out in TV and in print. Aside from that, sales representatives lack product briefing from the hardware owners.

A total of 523 (27%) responses can be attributed to the commercial awareness of ELI.

Q5. If the hardware stores understand, then what is their perception of ELI?

From the 27% who understood what ELI is, the respondents were asked to elaborate their understanding regarding ELI. In the table below, the top three perceptions voiced out by the respondents can be seen.

Nineteen percent said that they understood ELI but did not explain their answers further; 18% answered that ELI is a quality mark or a standard; 18% said that ELI means savings; 15% recalled that ELI means higher quality, durability, longevity, safety, has better illumination and is a product warranty.

Among the 523 who understand ELI, 440 (84%) have an accurate perception of ELI.

Table 7

Commercial Awareness of ELI

Response	No. of Answers	Percentage
ELI is understood but with no explanation	99	18.93%
ELI is a quality mark/ standard	95	18.16%
ELI means savings/ benefits	92	17.59%
ELI means higher quality/ durability/ longevity/ safety/ better illumination (brighter)/ product warranty	79	15.11%
Commercials/ lighting product endorsed by Michael V.	78	14.91%
ELI is a program/ standards organization	62	11.85%
ELI is a brand name	18	3.44%
ELI means CFLs are not counterfeit products	10	1.91%
ELI is a generic lighting product/ technology	3	0.57%
Expensive	3	0.57%

Q6. How many hardware stores are selling ELI-qualified CFLs?

Table 8

Hardware Stores Selling Compact Fluorescent Lamps

Response	No. of Hardware Stores	Percentage
Selling ELI qualified CFLs	492	30.81%
Not Selling ELI Qualified CFLs	1,105	69.19%
TOTAL	**1,597**	**100.00%**

Out of the 1,597 hardware stores that sells CFLs, **31%** of hardware stores sell ELI-qualified CFLs.

Q7. How do hardware stores rank the various attributes of lighting product?

Table 9

Attributes of Lighting Products (Ranking)

Attributes	1	2	3	4	5
Brightness	143	397	674	398	22
Price	1021	352	157	89	15
Brand Name	369	614	379	238	34
Lifespan	95	228	392	878	41
Warranty	6	14	24	89	1501

When asked the hardware store staff to rank lighting product attributes from 1 to 5 (1 being the priority), the consumers' responses were as follows:

a. As seen in table 9 the consumers highest concern is price. This may be in view of the economic problems they are faced with. Hence, price is the most important factor in making a purchase decision.

b. Brand name comes second, because consumers are concerned about buying authentic CFLs over counterfeit ones. They buy products with familiar sounding brand names to lessen the risk of buying low quality products.

c. Brightness comes third.

d. Lifespan comes fourth.

e. Warranty comes last since Filipino consumers have no solid experience that a piece of warranty paper will enable them to recover their cost of purchase.

Q8. What other types of lighting products do the hardware stores sell?

Table 10 shows the availability of the various fluorescent lamps in the different hardware stores. 100% of the hardware stores visited do not sell the T8 Linear Fluorescent Lamps (4ft, 32 watts). Only the 32 watts circular lamp is available.

Table 10

Availability of Other Fluorescent Lighting Products

Type of Lighting Product	Yes	No	Unsure/ No Response
Linear Fluorescent Lamp 4ft., 32 watts, T8	0	1972	0
Linear Fluorescent Lamp 4ft., 36 watts, T8	415	1528	30
Linear Fluorescent Lamp 4ft., 40 watts, T12	1655	287	30
Electronic Ballasts	308	1633	31

Note: The 32-watt T8 Linear Fluorescent Lamp was not available in all hardware stores visited. Although available, no data was gathered for 32-watt circular and electromagnetic ballasts.