

**If the catchphrase "follow the money" is apt ... ponder this...
Market researcher Navigant tells us global networked lighting controls revenue will
grow to \$4.8B by 2024 -- up from a still hefty \$2.2B today.
That will be more than double in less than ten years.**

Now that we live in a world where technology is finally connected with lighting -- and codes are in place to make sure it stays that way -- lighting controls get the kind of attention and respect lighting distributors have likely longed for. Conversations devoted to lighting controls take up more time for a lot of reasons...and not just because controls now offer opportunity for building management or save energy. As Gary Trott, VP Product Strategy Cree Lighting said at the 2014 Lightfair Conference, "Light used to just deliver light. Now it's much more in terms of being smart fixtures and having control...and controls being much more prominent and necessary."

Not only do controls demand more consideration, they now take a bigger chunk out of the construction budget, they are often fingered as culprits in stalled shipments that push back the entire schedule, and they're too often the cause of confusion as buyers -- and specifiers -- struggle to make choices from amongst equipment they don't yet know well.

Survey Says...

The recent [Caliber-led Title 24 State of the Union Survey](#) provides a view into the day-to-day as it relates to Title 24. When it came to controllers, we asked for an idea of the guidance survey participants were currently providing related to controls. Respondents reported the following: full-range dimming (72%), multi-stage dimming (72%), daylight harvesting (86%), controlled outlets (100%), and demand response (86%).

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We All Agree -- Lighting Controls Can Be Confusing

The march to transform away from a fluorescent lighting-dominant world (which is rapidly picking up speed) means a sharp increase in the variety of lighting controls with new players in the space hoping to gain a foothold and well established players pressured to produce new product lines quickly. David Neel of Neel Lighting, who works extensively with industry leaders Lutron and Cree, agrees the environment is much more complex and confusing. He says each manufacturer uses a different approach to controls and at this phase it may be unrealistic for engineers and specifiers to understand them all. "No doubt, Title 24 is complicated when it comes to controls," he says.

Chelsea Till, Sales Engineer for Lutron, suggests that in her experience only roughly 25%-50% of the contractors understand T24 well enough. "The majority are still dabbling," she remarks. "Often we see the comment 'Contractor responsible for Title 24 controls' on the drawings which can be challenging for those not well versed in the code," she said. "I've also seen repeated issues when those doing a retrofit aren't fully aware of the compatibility changes Title 24 brings about." In her view, there is both under compliance with Title 24 requirements and a good amount of overdesigning and overcomplicating by adding controls to areas where it may not be needed or is not a requirement of the code. Neel confirms they are often called in to help with lighting design and that its part of his service especially for structures over 10,000 sq. ft.

Schedule Delays -- What's Really to Blame?

Nearly 60% of our survey respondents reported that they believed lighting distributors are **not** using the new code demands to oversell products, but many (58%) did agree that construction schedules have been impacted by more than a week due to the changes Title 24 has brought about. Neel agreed that lighting controls have been known to hold up a project but counters with the suggestion that quality off-the-shelf items are available. In Till's view, the delays are more often due to the wait for custom fixtures. Neel suggests that the bigger schedule dragger is actually the submittal process during which specifiers are approving the equipment.

Many manufacturers claim to have been investing in awareness-raising exercises over the last few years to give distributors sufficient knowledge and ready-stock of T24-compliant products. Distributor Neel Lighting says Lutron asks them to host training sessions for contractors on a recurring basis to familiarize them with current offerings. Lutron suggests each distributor host at least five per year.

In the end, both LED light fixtures and the controllers that drive them are what San Diego-based global technology research firm ON World, Inc. calls part of a multi-decade consumer upgrade cycle. As Trott proclaims..."Right now we're just at the start..."

Shipments of smart wireless lighting products including

smart LED light bulbs and other wireless controls such as dimmers, switches and controllers will reach 400 million by 2019.

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