

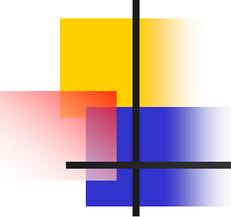
# Great Market Data

National ENERGY STAR<sup>®</sup> Partners Meeting  
October 4 & 5, 2004

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Susan Fisher

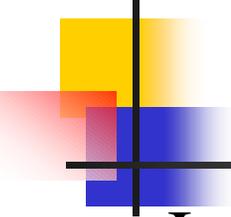
Home Appliance Program Manager



# Preview

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- Energy Efficiency in California and it's Future
- Benefits of Future Energy Efficiency
- Program Climate Change
- Our Program changes to fit New Climate
- Importance of Market Data
- Closing



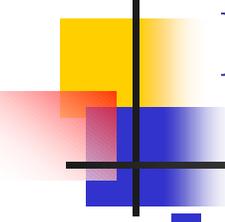
# Energy Efficiency in California

## Roller Coaster to Rocket Launch

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In California:

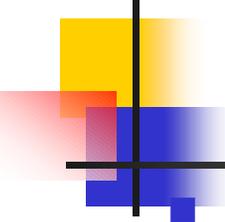
- During the next 10 years the largest energy efficiency effort in the US will double in size
  - ~ \$5 billion will be spent on energy efficiency
  - Economic benefit = \$15 billion
- State Legislative Mandate
- CPUC Regulated
- Multiple Funding Sources
  - Public Goods Charge (PGC)
  - Procurement



# Benefits of Energy Efficiency Future

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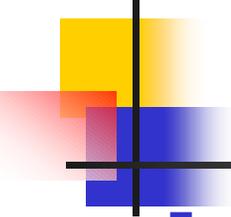
- Benefits over next 10 years
  - Energy savings
  - Reduction in air pollutants
  - Stabilization of rates
  - Reduced peak electrical usage
  - Increased service reliability
  - Improved comfort & convenience level
  - Better business economy



# Program Snapshot

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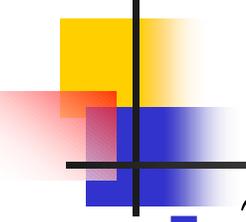
- Positive signal from regulators – two-year decision – 2004-2005
  - Local program offerings for targeted outreach
  - PG&E program budget reduced
  - New funding source = New focus - Peak Demand Reduction
  - Long term program administration in California pending
  - Lead Commissioner Kennedy advocating utility administration of energy efficiency programs
  - Potential three-year funding cycles



# Program Role in New Climate

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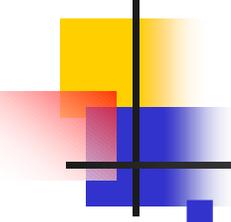
- Mandates:
  - Regulatory goals to deliver kW, kWh & Therms savings
- Need for:
  - Reliable data to base projections
  - Potential & achievable energy efficiency savings must be identified
- Challenge:
  - Existing programs have achieved saturation for rebates on some products – energy efficiency bar needs to be raised
- Potential Impact:
  - Regulators may turn to other strategies / markets for energy efficiency savings if we don't deliver



## PG&E – What We've Done

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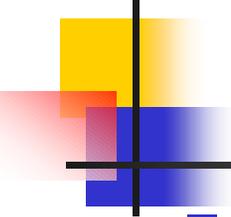
- 2001 Program shift from contractor to direct customer rebate
- 2002 Rebate Processing brought in-house
- Program participation - steady
  - 170,000 in 2001 = HIP & HPPL (outside processing)
  - 130,000 paid in 2003
  - 130,000 ~ 2004 projected
- Appliance applications = 50% of activity



## PG&E – What We’ve Done

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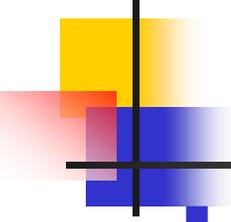
- Partnerships with trade allies – Key delivery for increase in sales of energy efficiency products, consistent messaging, combined rebates, etc. for customers
- New energy efficiency rebate delivery channels –
  - instant rebates – reduced processing costs, increased customer satisfaction
  - water districts – combined saving focus (energy & water) – increased customer participation, reduced marketing costs, strengthened partnerships
    - East Bay Municipal Water District
    - Marin Municipal Water District



## What We've Done (cont'd)

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- Vendor database ~ 60,000 (1,600 retailers; 50% appliance – big & small)
  - Communications
    - Dedicated retailer hotline
  - Materials
  - Training
  - Promotions
    - Billboard, tent cards, Bill Inserts, Co-Op Signage, others
  - Community Events



# Data Importance

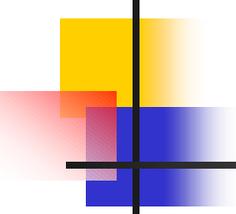
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- PG&E Data Collection ~ Soup to Nuts

- Customer Information – geographic & personal
- Purchased from - Retailer / Contractor
- Product Information – Manufacturer / model / price
- Date – Installed / purchased
- Multi-product applications

- PG&E Data Use ~ Lemon to Lemonade

- Energy Savings
- Identify constrained area
- Share information with trade allies
- Use for program planning
- Targeted marketing – Demographic, ethnicity, etc.

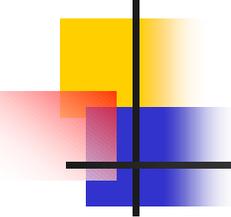


# Utility & ES Data

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- Present ES Data:
  - State-by-state & National basis

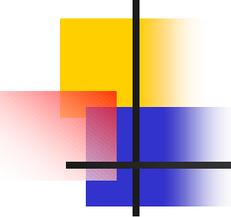
Type	Quarter	% ES National	% ES State	???
CW	All	25.58	33	
DW	All	72.95	76	
Ref	All	32.26	40.6	



# Utility & Energy Star Data – Future Energy Star Data

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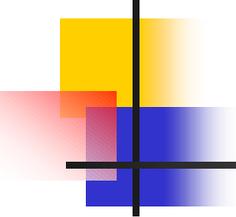
- Further segment data to:
  - IOU territory
  - Sales
    - Product type – CW, DW, etc.
    - Product quantity
    - Energy Efficiency vs. non Energy Efficiency products
    - By city
- Purpose:
  - Compare PG&E data to Energy Star data
  - Compare census demographic – urban, rural, income, age, etc.
  - Advance program communications
  - Co-Promotional opportunities; special events



## Future Energy Star Data (cont'd)

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- Benefits - better, faster, cheaper
  - Collaborative relationships
  - Targeted outreach
  - Better messaging
  - Increased results



# Summary

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$$ES + M/R + U = GMD$$

- Enable better targeting
- Increased customer awareness
- More energy efficiency products sold
- More energy saving
- Savings for customers
- Less air pollutants
- Improved comfort & convenience level