Energy Market Trends

- Household consumption declining
- Sectorial consumption increasing
  - Population growth
  - Increase of electric devices
- Large, per unit savings dwindling

Cost Effective Savings Harder to Achieve
Retail Market Trends

- Lower margins
- Growth is online, offline remains dominant
- Personalized marketing strategies
- Technology gives customers more control
- Big data - privacy concerns

Top 10 US “Plug-Load” Retailers:
$1 Trillion Revenue, yet 2.2% Median Net Profit
Opportunity: Transform the way energy efficient products and messages are delivered

• Effective and efficient
• Leverage retailers’ up and down market capabilities
• Enhance customer relationships
• Improve operations and data accuracy
• Promote regulatory policy and EM&V approaches supportive to innovation

Collaborate to produce more energy savings at significantly lower cost!
Collaboration

- Critical to unlocking remaining energy efficiency potential
- Builds scale to influence markets
- Reduces costs for retailers and program sponsors
- Allows for local/regional personalization for program sponsors and retailers
Marketing Strategies

1. Price
2. Promotion
3. Placement
4. Positioning
5. Products
6. Profit

19 billion impressions: store, web and mobile
+150 opportunities per household to educate and market
The ENERGY STAR Retail Products Platform

- EPA will serve as coordinator and facilitator for the effort, and will communicate with regulators on the national level.
- EPA will also help the group leverage the ENERGY STAR brand platform as part of its national scope.

**Task Forces**

**EM&V/Regulatory**
- Noah Horowitz – NRDC
- Julie Colvin – PG&E

**Data Requirements**
- Jon Clark – NEEA

**Product Specifications**
- Peter Banwell – EPA
- Michael Russom – VEIC

**Legal Agreements**
- Larry Tabizon – SCE
- Tim Michel – PG&E

**Marketing**
- Linda Malek – SCE

**Outreach**
- Tim Michel – PG&E
- Noah Horowitz – NRDC
- Jon Clark – NEEA
An Engaged Ecosystem

National Planning, Facilitation, Monitoring & Support
US EPA
(Navitas Supporting)

&

Local/Regional Planning & Execution
Pilot Sponsors
(Implementation Contractors Supporting)
Critical Success Factors

- Scale
- Common products
- Consistent program design and approach (i.e. midstream incentives)
- Streamlined data and reporting requirements
- Uniform templates with allowances for local/regional personalization
- Supportive regulatory policy and EM&V approaches

“Grass Roots”
Program Sponsors and Retailers develop the “game rules”
Join the ENERGY STAR Retail Products Pilot to Influence Next Generation Retail Programs

- 2015 pilot
- 2016 national program launch

Contact
- Peter Banwell: banwell.peter@epa.gov
- Hewan Tomlinson: tomlinson.hewan@epa.gov
- Patrick Kilroy: pkilroy@navitas-partners.com