Great Market Data
National ENERGY STAR® Partners Meeting
October 4 & 5, 2004

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Preview

- 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

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

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

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

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

- 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

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)

• 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

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

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

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Utility & Energy Star Data – Future Energy Star Data

- 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)

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

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

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