

Great Market Data

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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

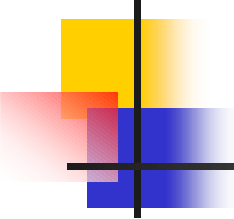
- Energy Savings
- Identify constrained area
- Share information with trade allies
- Use for program planning
- Targeted marketing – Demographic, ethnicity, etc.



Utility & ES Data

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

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

- 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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