

## DOCKETED

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# Moving Markets through Simple, Scaled & Synchronized Midstream Approaches

**CEC IEPR Plug-Load Workshop | Sacramento, CA**

**Julie Colvin** | Senior Program Manager  
PG&E Residential Programs

June 18, 2015







# Dilemmas of Innovation

Risk

Change

Uncertainty

Disruption

Fast







Keep it simple.



# Agenda

Challenges

RPP Program Goals

Unique Approach

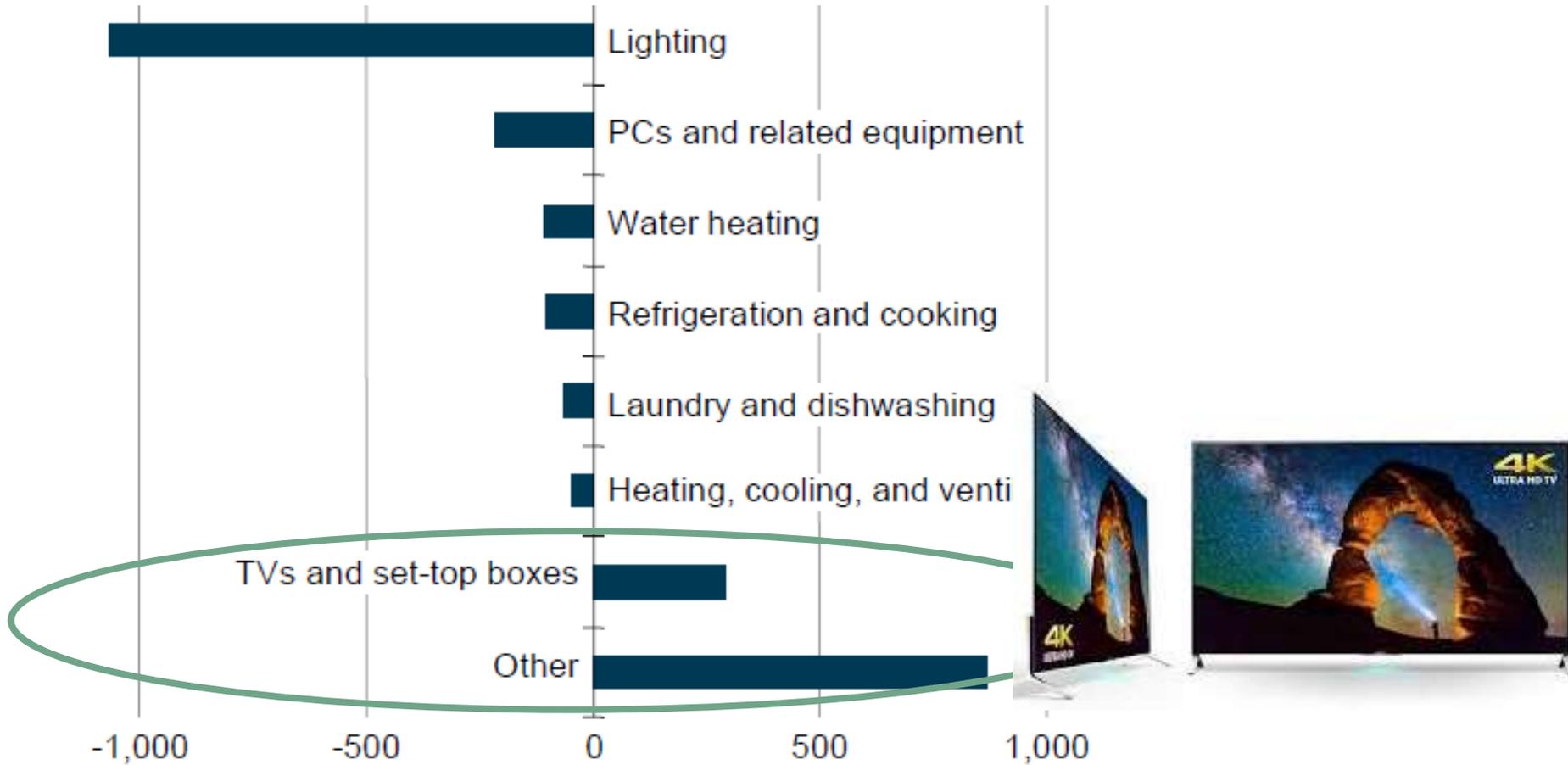
Opportunities

# 3 Key Challenges

A photograph of a cornfield in the foreground with high-voltage power lines and towers stretching into the distance under a clear blue sky. The corn plants are green and tall, with some tassels visible. The power lines are black and run diagonally across the frame, supported by metal towers. The sky is a solid, clear blue.



# Growing Miscellaneous Plug-load Energy Use



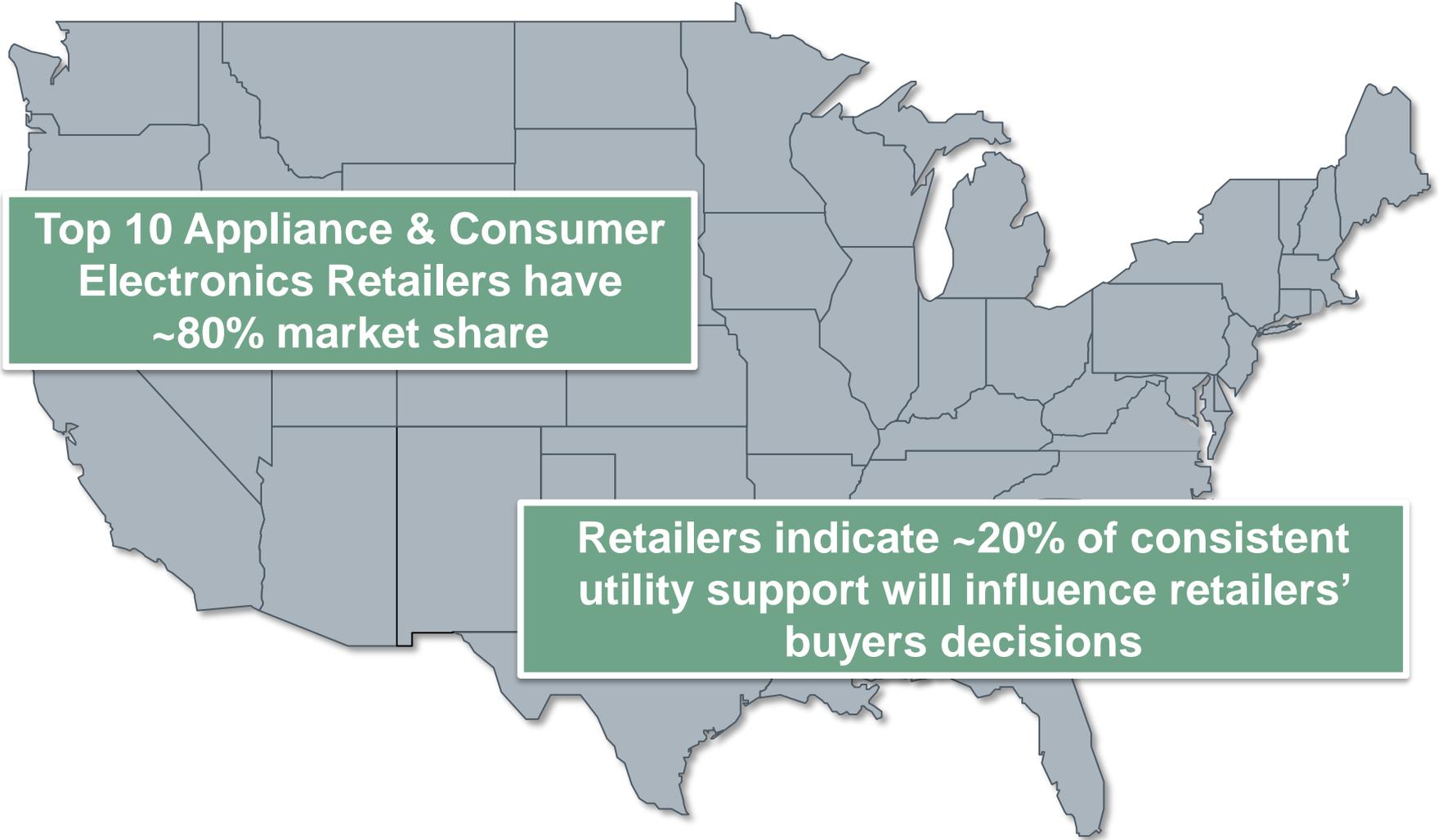
Source: U.S. Energy Information Administration | Annual Energy Outlook 2014

Change in residential electricity consumption per household (2012-40)





# Retail Market



**Top 10 Appliance & Consumer Electronics Retailers have ~80% market share**

**Retailers indicate ~20% of consistent utility support will influence retailers' buyers decisions**

# Midstream Retail Products Platform (RPP) Program Goals





# Program Theory & Objectives

## Theory

- A combination of incentives and engagement will motivate retailers to promote, assort, stock, and demand more energy efficient (EE) models than they would have absent the program.

## Short-term Objective

- Motivate participating retailer to promote and sell more efficient models

## Medium-term Objective

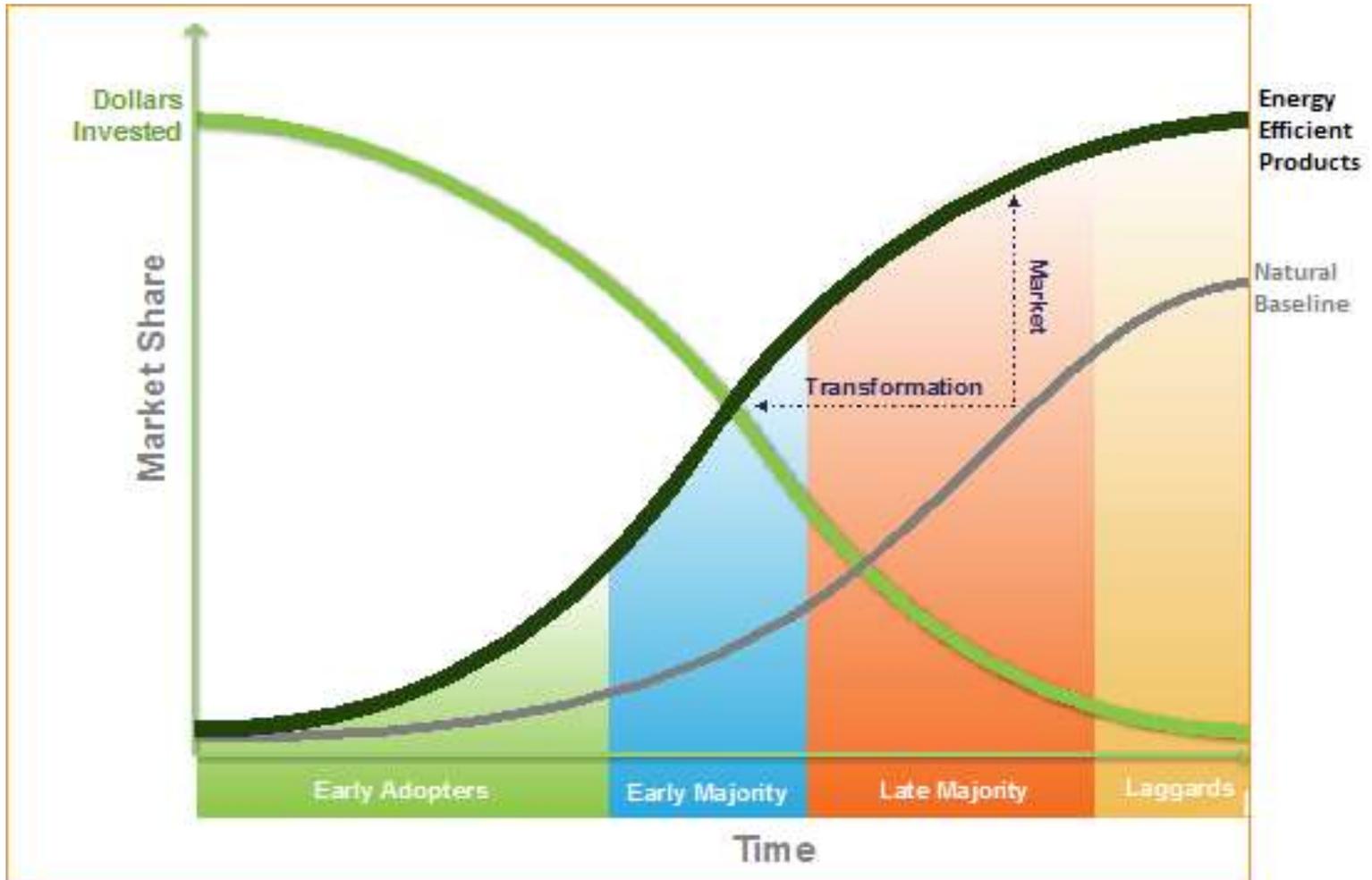
- Motivate retailers to regularly demand and stock the most efficient models available from their manufacturer partners

## Long-term Objective

- Induce sustained *structural changes in the market for targeted products* to accelerate and increase adoption for participating and non-participating retailers



# Transform the Retail Market



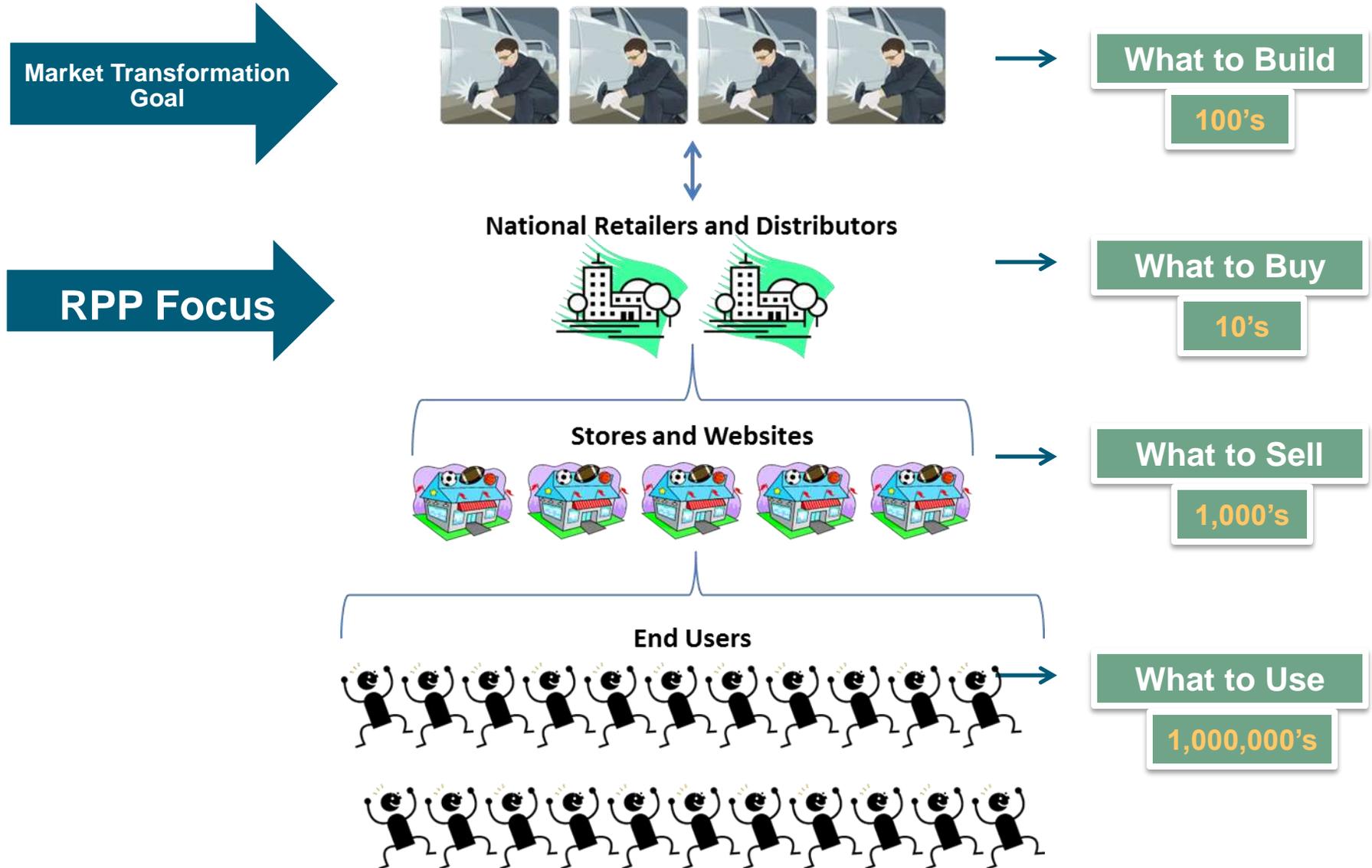
Source: NEEA

# Unique Approach





# Retail Value Chain: Consumer Products





# Make the most efficient choice easy

## Today



## Tomorrow

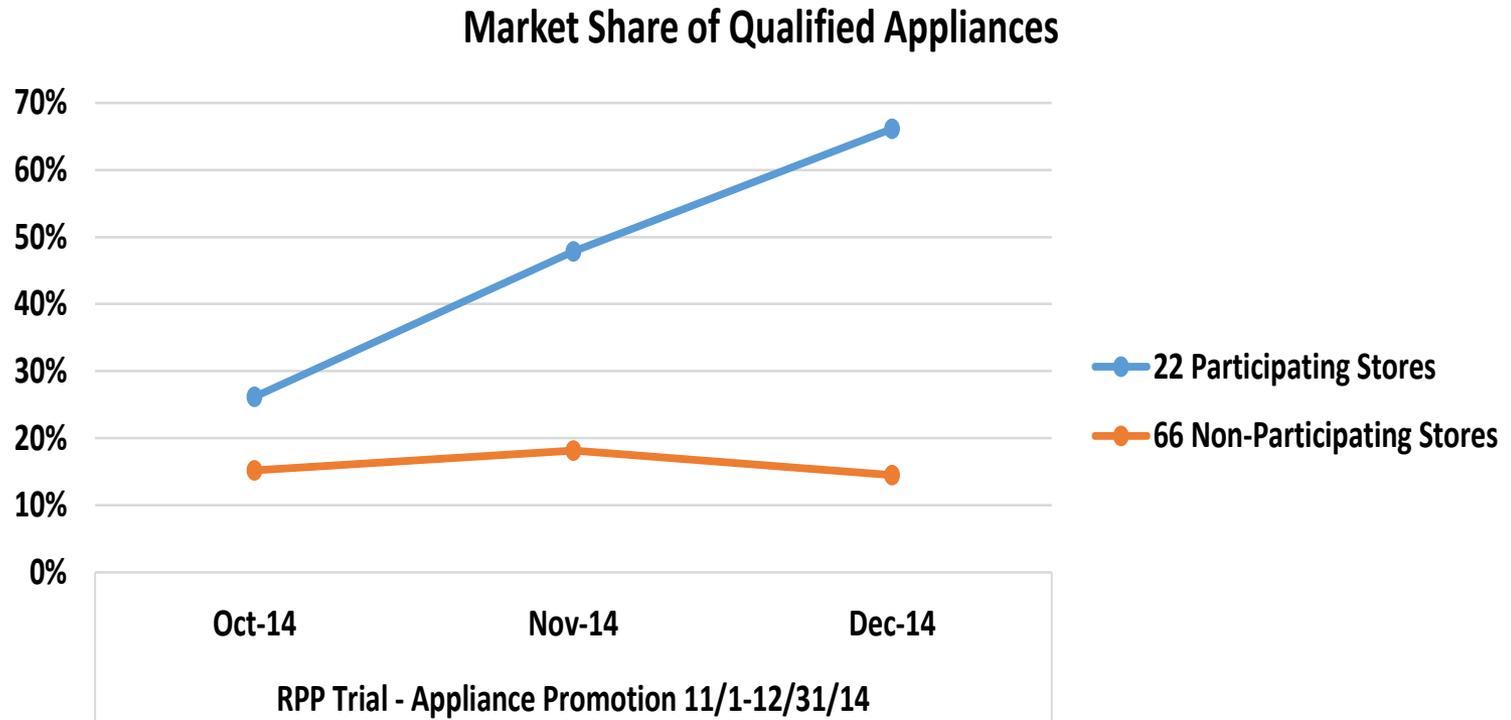
Midstream  
Retailer  
Incentive





# Midstream Collaboration: 2014 Retail Plug-Load Pilot

**Objectives:** Operation, Evaluation & Performance





# Retail Products Platform Proposed 2016 Trial Overview

Objectives

Performance



Operational



Evaluation

Retailers



Products



Home-Theaters-in-a-Box/Sound Bars  
(ES + 50%)



Air Cleaners



Dryers



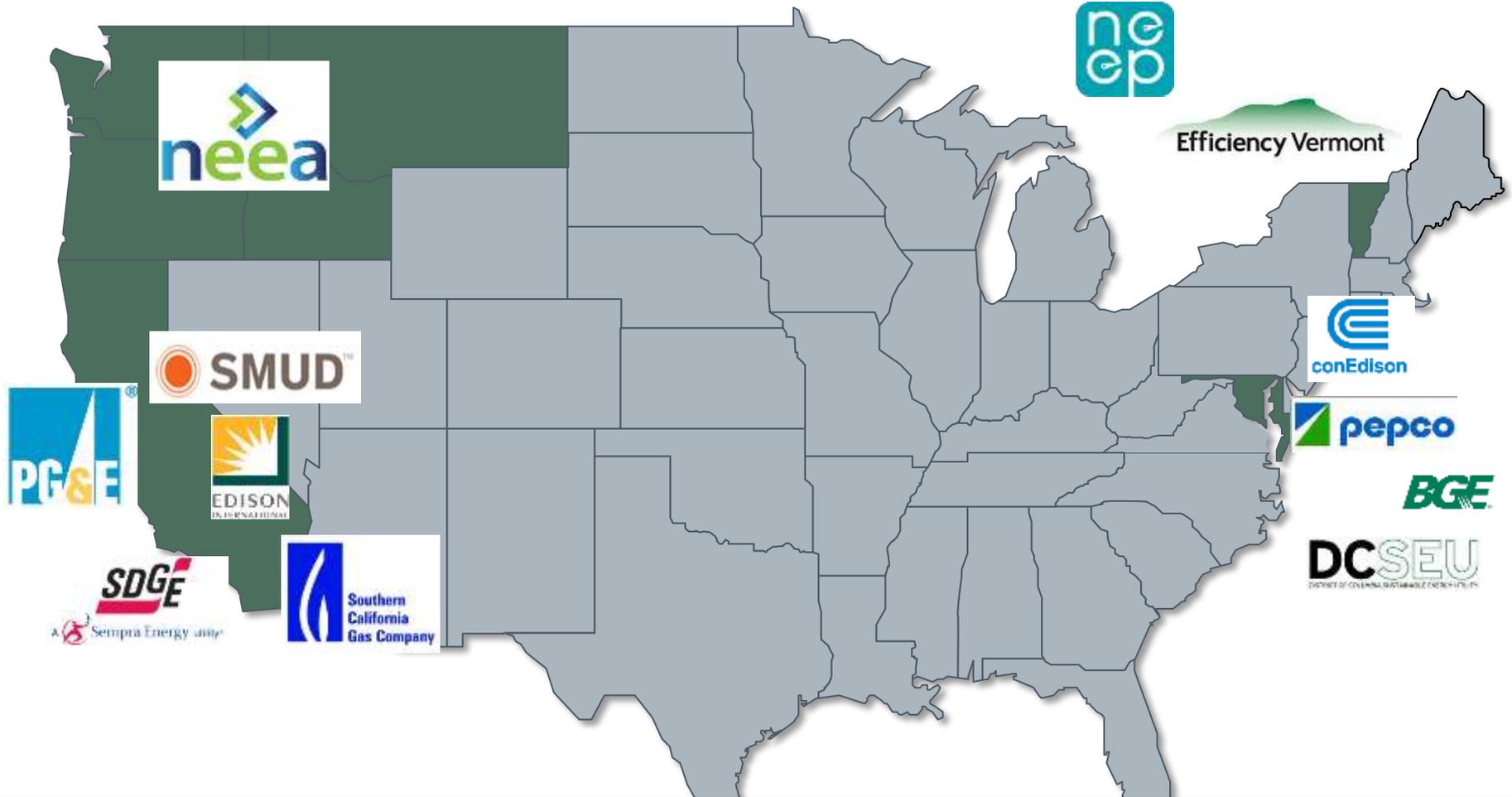
Room Acs?



Freezers



# Building Scale to Influence Retail



15% Market Share of Utilities seeking approval for 2016 program launch

# Opportunity





# MT Evaluation Approaches

## Traditional Approach

Home Money Saver:  
**Residential Rebates Application**

Please complete all the steps. Incomplete applications cannot be processed. This application is for one installation address (Service ID). If you are applying for rebates at more than one installation address, please contact your account manager.

**STEP 1 ACCOUNT AND CUSTOMER CONTACT INFORMATION**

PG&E will use the information you provide below to contact you, if necessary, about your application.

Please refer to your PG&E bill for Service ID numbers.

Service Agreement ID Number from "Details of Gas Charges"

Service Agreement ID Number from "Details of Electricity Charges"

Account Holder Name (as it appears on PG&E bill)

Contact Name (if different from Account Holder)

Product Installation Address  Apt./Unit Number

City  State  Zip Code

Mailing Address (if different than Installation Address)  Apt./Unit Number

City  State  Zip Code

Phone  Secondary or Alternate Phone

Email Address   Yes, I would like to be notified by email of other PG&E programs.

Property occupied by:  Owner  Tenant Estimated Year Built

Property Type:  Single Family  Mobile Home  Apartment/Condominium

Name of mobile home park or apt. complex (if applicable)

## Market Transformation Approach

Rich data from multiple sources: retail sales, manufacturers, EPA, DOE

### Comparison Techniques

- Historical vs. Current Sales
- Forecast vs. Current Sales
- Participating vs. non-participating stores or regions

### Market Transformation Evidence

- Survey market participants and stores
- Accelerate code and voluntary standards
- Increase and accelerate adoption<sub>23</sub>



# Summary

## Utilities Scaled Incentives + Streamlined Retailer Engagement



More efficient products on store shelves

More customers choose the efficient option

Energy savings

Market Impacts

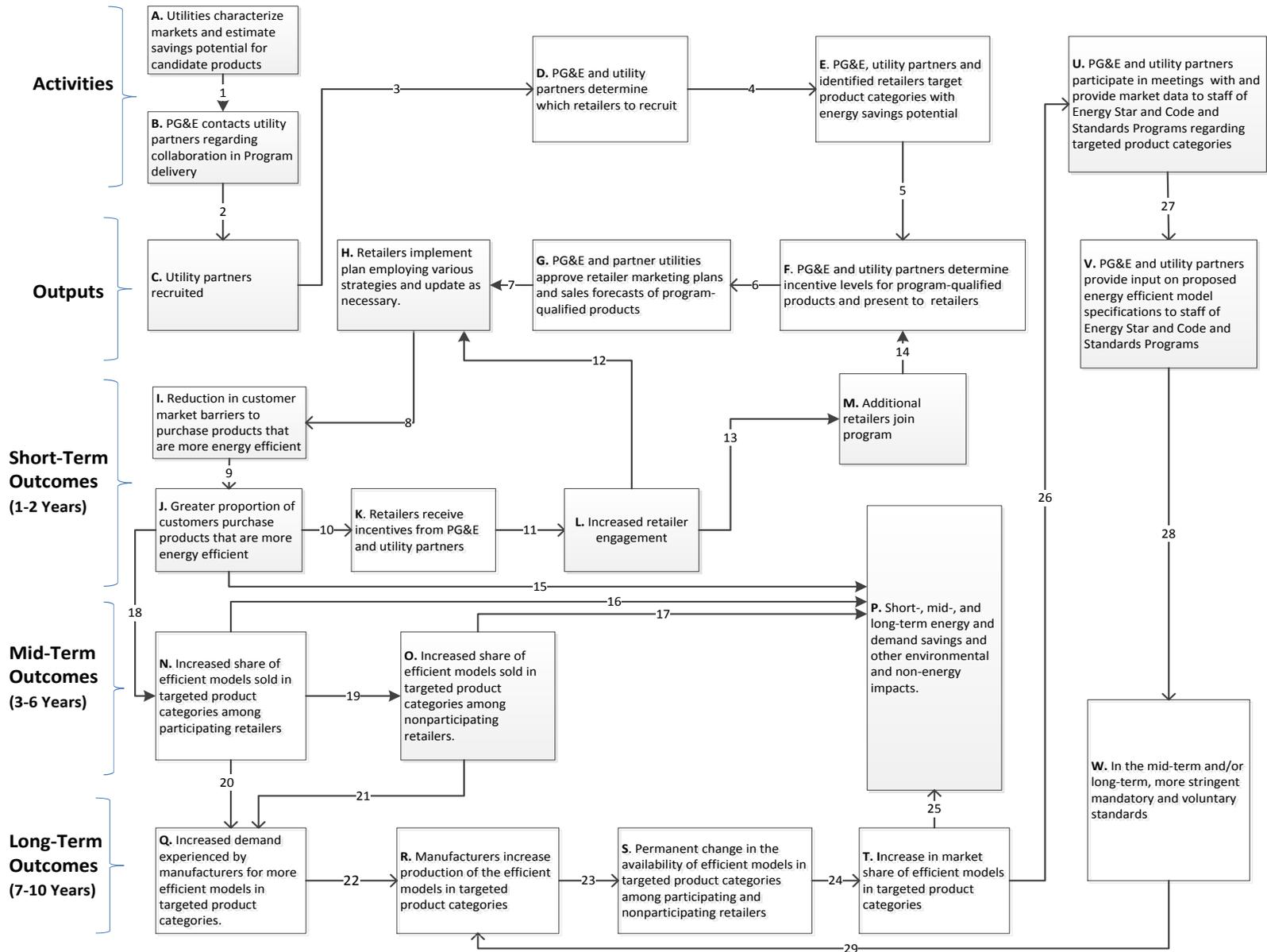


**Questions?**





# Logic Model

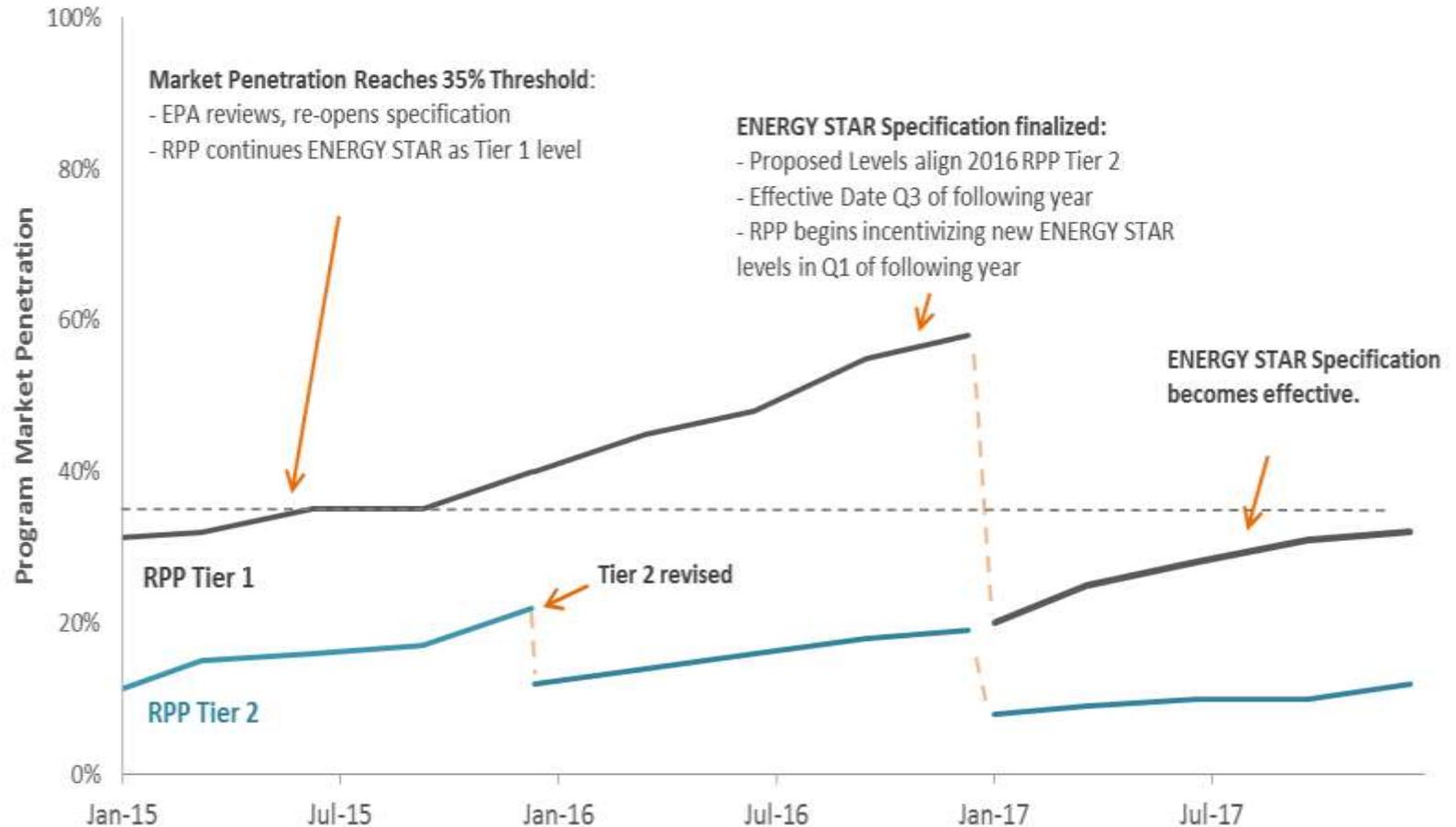


**Sample of External Influences:** Broad economic conditions, market events, cost of energy, federal standards, Energy Star, perceived need for conservation, etc. Factors can influence program at all levels and time frames.



# RPP Product Platform

## Example Program Transition Strategy





# Midstream Collaboration: 2008-2012 TV Pilot

## Estimated Energy Use by Size for New TVs

