

Retail Products Platform Quarterly Review with CPUC Staff

October 14, 2016



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Pacific Gas and Electric Company (PG&E)



Agenda

PG&E RPP activities to-date

- Key indicators and targets, sales data, and retailer Implementation Plans

Planned RPP Pilot activities in 2017

- Additional retailers and products, Workpaper updates, Evaluation preparations

Discussion topics for today

- Reporting savings claims
- Evaluation coordination
- RPP Sales Data Dashboard options
- Discussion topics for next time



Activities to Date

Date	Activity
May 27th	EM&V evaluability study started
June	Retailers commence Implementation Plans PG&E collects shelf surveys
July 8th	Customer Voice Panel survey research plans for clothes washers and air cleaners submitted
July	First incentives paid
August	Began Air Cleaner Testing, developing research surveys
September	New qualified products identified for 2017
September 30th	Preliminary Research Results: Update Submitted
October	Sound bar testing



Key Indicators and Targets

Activities to Date

Key Indicators and Targets*	Current (2016)	Projected 2017	Projected 2018	Projected 2019
US utility customers served	15%	20%	25%	30%
RPP Participating Retailers	4	6	7	8
Product categories	6	8	10	12
Executed implementation plans	3	5	6	7
RPP vs. all products in stores**	0%**	5%	8%	10%
RPP product market share**,***	25%	27%	30%	25%***

* Summary of Key Indicators taken from RPP Advice Letter, Appendix F

**Analysis underway of initial shelf survey and sales data;

***RPP will push ENERGY STAR spec changes over time – once adopted, RPP market share resets



Sales Data

Activities to Date

PG&E RPP Qualified Product Market Share

- Aggregated qualified product market share by month, program start (March) through August 2016
- Data aggregator still needs September data from two retailers

	3/1/2016	4/1/2016	5/1/2016	6/1/2016	7/1/2016	8/1/2016
Air Cleaners	42%	72%	64%	64%	68%	68%
Room Air Conditioners	12%	42%	45%	56%	65%	9%
Clothes Dryers	12%	23%	29%	26%	28%	29%
Freezers	10%	15%	15%	17%	14%	10%
Sound Bars	4%	11%	7%	8%	9%	8%
Overall*	10%	23%	24%	30%	30%	17%

*all RPP qualified product sales out of all RPP product categories



Implementation Plans

Activities to Date

Retailers submitted Implementation Plans

- Updated in July and implementation underway

PG&E Field Teams now visiting retailers

- Place Smart Choice signage, promote models at marketplace.pge.com
- Coach retailer sales representatives on talking points, provide tip sheet
- Conduct monthly shelf survey



Save money and energy
on products with the
Smart Choice badge.



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Shelf Survey Data

Activities to Date

- Monthly shelf surveys performed by field team
- Summary of findings of stores in PG&E territory
- Pictures of RPP products, marketing, and pricing

	Brand Name	Manufacturer Model #	ENERGY STAR	Retailer Item #	Regular Price	Current/Sale Price	# Units
16	Sony	HT-NT5		4890100	799	799	1
17	Vizio	SB2920-D6	x	4969606	99	99	6
18	Vizio	SB3831-C6M	x	3857021	249	223	2
19	Vizio	SB3831-DO		4897902	269	269	3
20	Vizio	SB3851-D0		4897902	299	269	
21	Vizio	SB4031		4969607	379	329	4
22	Vizio	SB4051-CO	x	3484037	349	331	3
23	Samsung	HWK4000/ZA		4922500	399	329	
24	LG	SH3K		5492307	279	279	
25	Klipsch	RSB-11		5510200	599	599	
26	Vizio	SB4051-D5		4969605	417	417	
27	Insignia	NS-SB216		5225704	79	79	3

Subset of Sound Bars – Best Buy 9/29/16

To track product changes on the survey sheets, the team has used **red** font for items that are no longer on the sales floor. Newly added items are listed in **green** font.





Planned Pilot Activities in 2017

- Update RPP workpaper (Review updates with CalTF in December, provide to CPUC by January 2017)
- Submit Tier 2 Advice Letter (February 2017)
- Add retailers to increase RPP reach: Lowe's, Nationwide
- Evolve product offerings and specifications: Clothes Washers and Refrigerators; advocate for change to ENERGY STAR specs
- Recruit more California IOUs to leverage scale
- Conclude internal evaluability study



Workpaper Research Updates

Market Barriers Research: Research into Action

Project Scoping	✓ Completed , posted on Basecamp February 29
Review products and conduct secondary research	<ul style="list-style-type: none">• Air cleaner and Room AC complete• Clothes dryers, clothes washers, freezers, refrigerators, sound bars in progress
Interview RPP designers/staff and translate barriers	✓ Completed: PG&E, EPA, NEEA, Navitas, Rick Ridge
Interview market actors	<ul style="list-style-type: none">• Three retailer interviews completed,• Manufacturers, trade associations, and component suppliers remaining• Complete by November 2016
Survey consumers	October/November 2016
Analyze and report findings	Complete by December 16, 2016



Workpaper Research Updates

Clothes Dryer Research: EMI

Review of the California Lighting and Appliance Saturation Study (CLASS) and Data	✓ Completed
Review of the Northwest Energy Efficiency Alliance (NEEA) 2014 Dryer Field Study	✓ Completed
Review of ENERGY STAR Data	✓ Completed
Review of Other Relevant Resources	✓ Completed
Finalize Survey Sample Design	✓ Completed
Survey Development	✓ Completed, posted to WPA and Basecamp on July 8
Survey Deployment	✓ Completed
Analysis and Reporting	Complete by December 16, 2016



Workpaper Research Updates

Air Cleaner Research: EMI

Update Research Plan	✓ Completed, posted to Basecamp and WPA on July 8
Review Prior Research	✓ Completed
Survey Development	• Final survey instrument posted to Basecamp and WPA 9/27
Survey Deployment	• Soft launch 9/23 • Full launch complete 10/11
Analysis and Reporting	Complete by December 16, 2016



Early EM&V Updates

Early EM&V: EMI

Review and Update Evaluation Plan	<ul style="list-style-type: none"> Will update as needed once data is available and quality checked
QA/QC Retailer Sales Data	<ul style="list-style-type: none"> Continuing to receive sales data Continuing meetings with ICF Expect process to continue into Q1 2017 Unmatched models are an issue and are due to retailer error, lack of similar categories, derivative models Binning of unqualified models is an issue and will take time to resolve Shelf survey verification continuing

Market Data	<ul style="list-style-type: none"> California baseline approach using sales data from non-participating stores of participating retailers Expect data will be available in November
Program Staff Interviews	<ul style="list-style-type: none"> First round being scheduled now Second round will occur March 2017
ESRPP Effort	<ul style="list-style-type: none"> Retailer interviews complete Goal is to share report late October
National Market Share	<ul style="list-style-type: none"> Two options: Enervee, direct from retailer
Analysis and Reporting	Ongoing
Report and Presentations	<ul style="list-style-type: none"> Interim Report late December/early January Final report in April/May



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Data Dashboard / Data Sharing Rules

RPP Data Reports	Aggregated (3 or more Retailers) Report Distribution
Qualifying Sales Total	PG&E (non-confidential)
Qualifying Penetration Percentage	PG&E (non-confidential)
Energy Savings	Public
Energy Savings Percentage	Public

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Sales Data

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PG&E RPP Qualified Sales Summary

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	3/1/2016	4/1/2016	5/1/2016	6/1/2016	7/1/2016	8/1/2016	Total
Air Cleaners	351	693	473	446	516	510	2,989
Room Air Conditioners	18	591	1,009	3,119	2,695	284	7,716
Clothes Dryers	818	1,635	1,925	1,916	2,659	1,199	10,152
Freezers	107	193	196	297	250	173	1,216
Sound Bars	113	304	221	252	310	283	1,483
Total	1,407	3,416	3,824	6,030	6,430	2,449	23,556



RPP Products

Proposed RPP products for 2017:

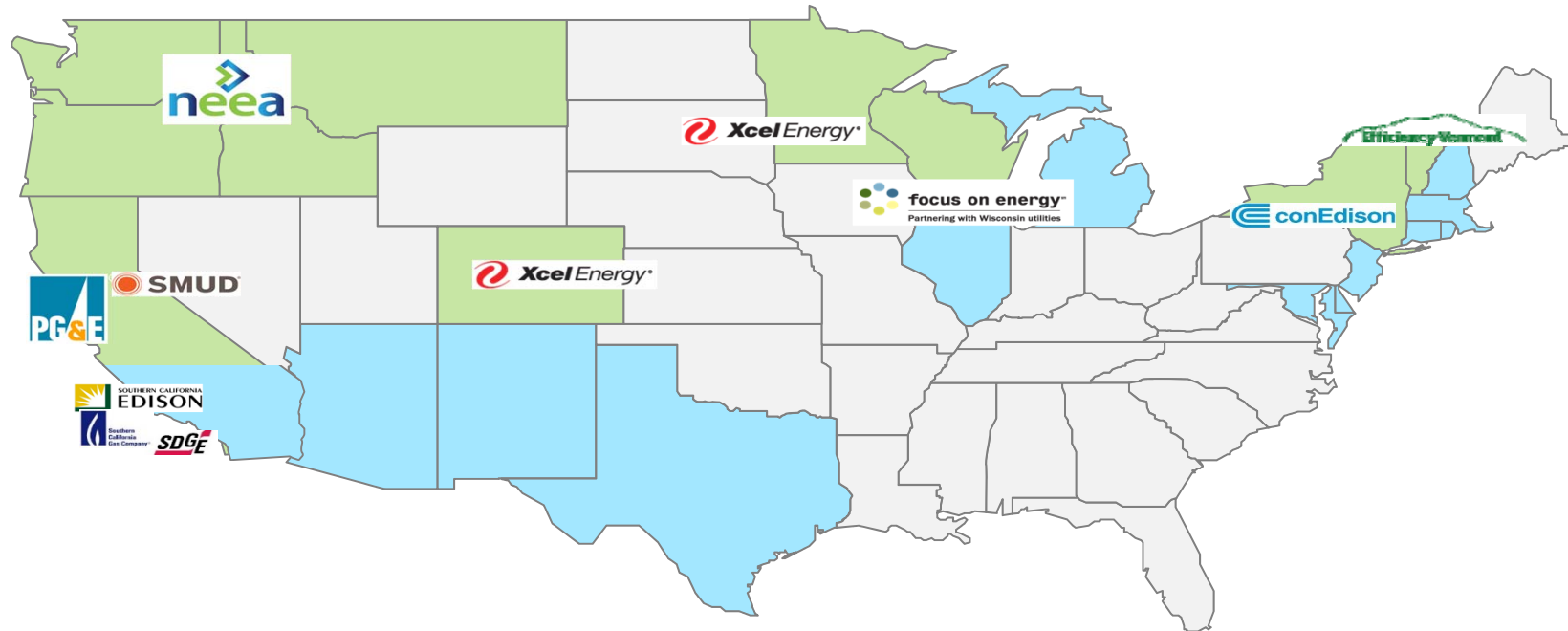
- ENERGY STAR refrigerators and clothes washers
- Specification will be set in consensus with the ESRPP members and based on ES market share data provided by retailers
- Initiate ES transition of Basic and Advanced Tier specifications for air cleaners / product categories which show 35% market share

Workpaper update of existing and new measures:

- Engage CalTF and Ex Ante Team to update RPP workpaper inputs



Participating Utility Sponsors in RPP



2016 Pilot includes 8 program sponsors in 10 states – 15% of U.S. Market

19 sponsors in 12 states assessing 2017/18 participation – additional 23% of U.S. Market



New Utility Sponsors

Status by Program Sponsor – 9/30/16

- Hawaii Energy, Efficiency VT, ConEd and NJ Clean Energy to be fully implemented after executing data services contract with ICF
 - Implementation plans in effect
- Two additional program sponsors expect to join ESRPP before the end of 2016
 - Consolidated Edison, New Jersey’s Clean Energy Program
 - SCE deferring participation until 2017

EEPS	State	Best Buy	Sears	Kmart	Home Depot	Total
ESRPP 9/16 Total		134	79	80	244	537
Efficiency Vermont	VT	1	1	2	3	7
Hawaii Energy	HI	2	4	6	7	19
ConEd	NY	20	6	8	25	59
NJ Clean Energy Program	NJ	14	13	17	41	85
ESRPP 2016 Total		171	103	113	320	707
U.S. Totals		1,034	688	869	1,965	4,556
ESRPP %		16.5%	15.0%	13.0%	16.3%	15.5%