



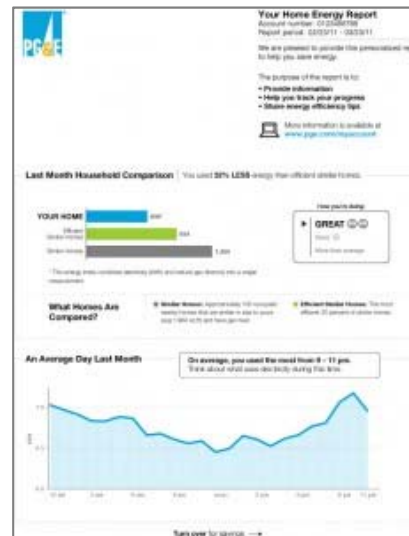
National Symposium on Market Transformation

“Minding the Gap: Can Residential EE Programs and ENERGY STAR Keep Pace with the Market?”

Jan Berman, Sr. Director, PG&E



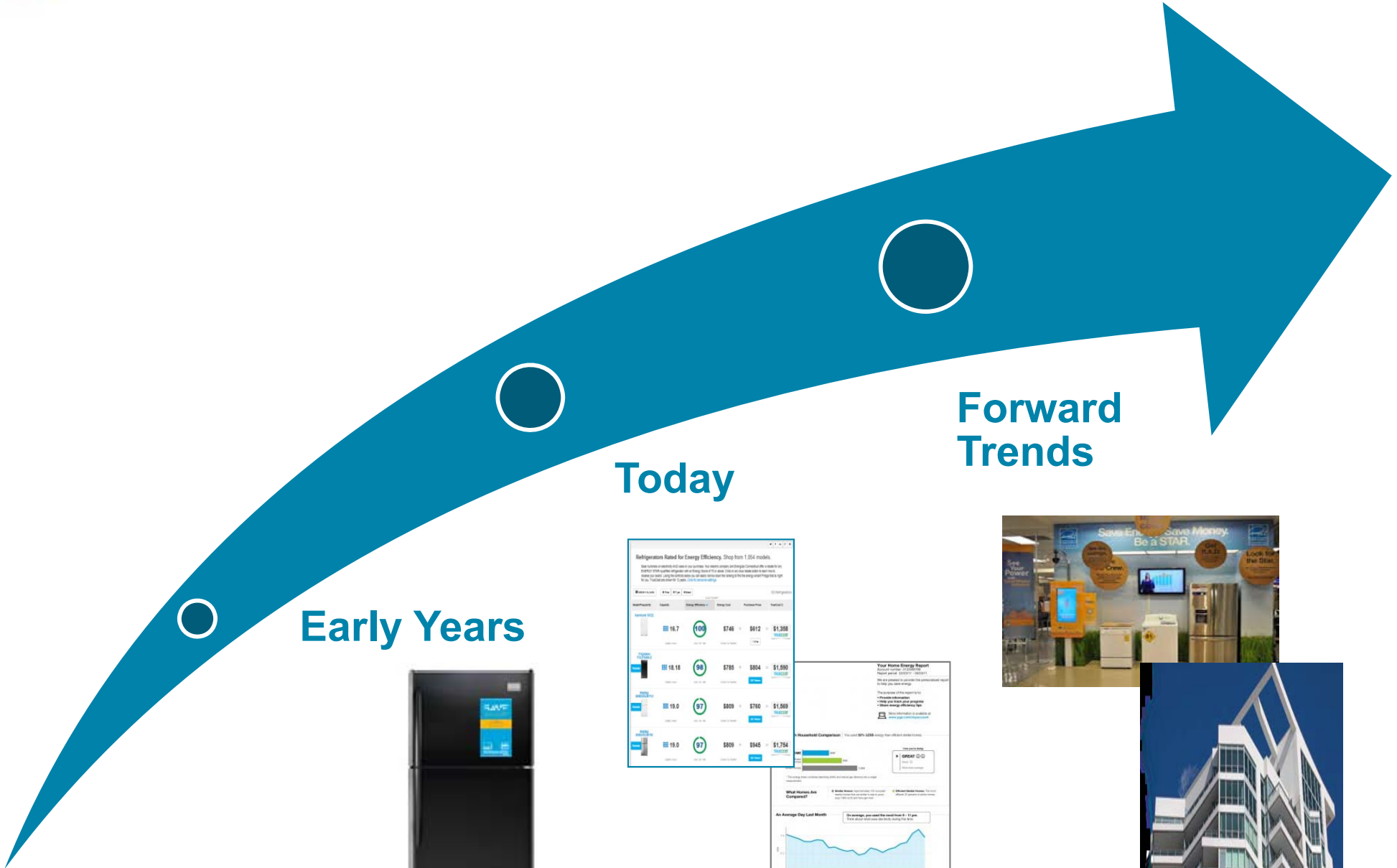
April 22, 2015



Refrigerators Rated for Energy Efficiency. Shop from 1,054 models.

See hundreds of electricity AND save on your purchase. Your electric company and Energize Connecticut offer a rebate for any ENERGY STAR-qualified refrigerator with an Energy Score of 75 or above. Click on any blue rebate button to learn how to receive your rebate. Using the controls below you can easily narrow down the ranking to find the energy-efficient fridge that is right for you. TrueCost are shown for 12 years. [Click for personal settings](#)

Model/Popularity	Capacity	Energy Efficiency	Energy Cost	Purchase Price	TrueCost @ 12 Years
Kalmanor 70722	16.7	100	\$746	\$612	\$1,358 TRUECOST
Frigidaire FQR13ARLE	18.18	98	\$785	\$804	\$1,590 TRUECOST
Midea MEXXG07VV	19.0	97	\$809	\$760	\$1,569 TRUECOST
Midea MEXXG07VM	19.0	97	\$809	\$945	\$1,754 TRUECOST



Early Years



Today

Refrigerators Rated for Energy Efficiency. Shop from 1,554 models.

Model	Energy Star Rating	Price	Features
Model 1	16.7	\$746 - \$812	Energy Star Certified
Model 2	18.18	\$785 - \$884	Energy Star Certified
Model 3	19.0	\$809 - \$760	Energy Star Certified
Model 4	19.0	\$809 - \$945	Energy Star Certified

Your Home Energy Report

Household Comparison

What Others Are Comparing

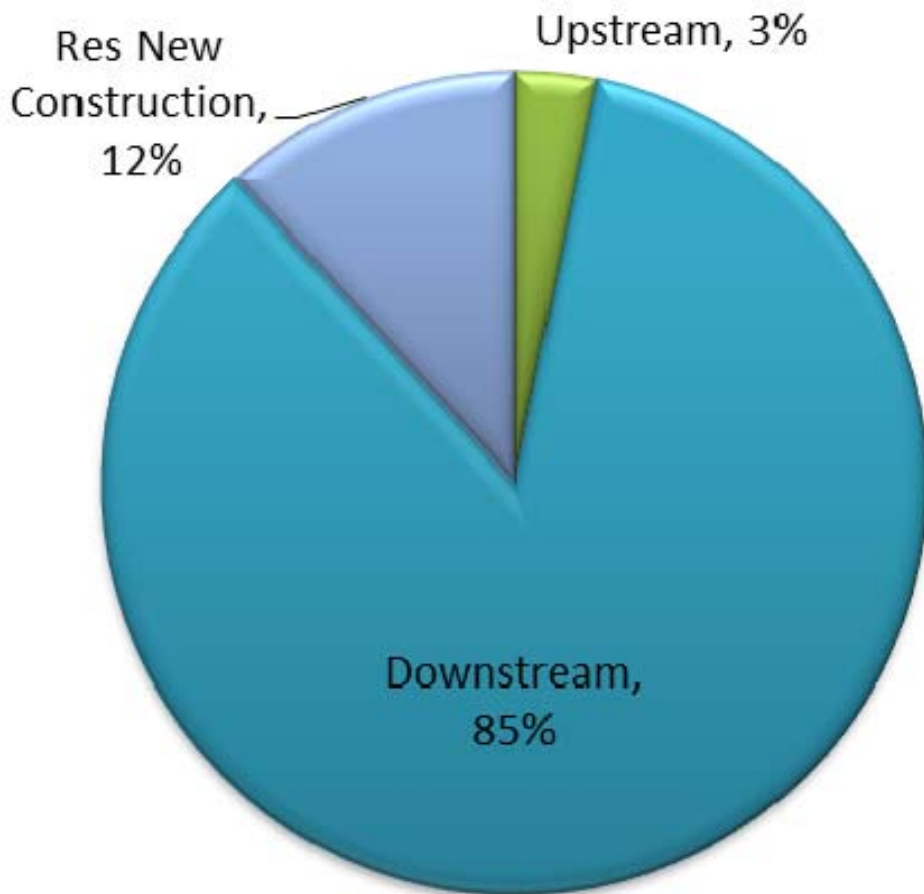
My Average Day Load Month

Forward Trends

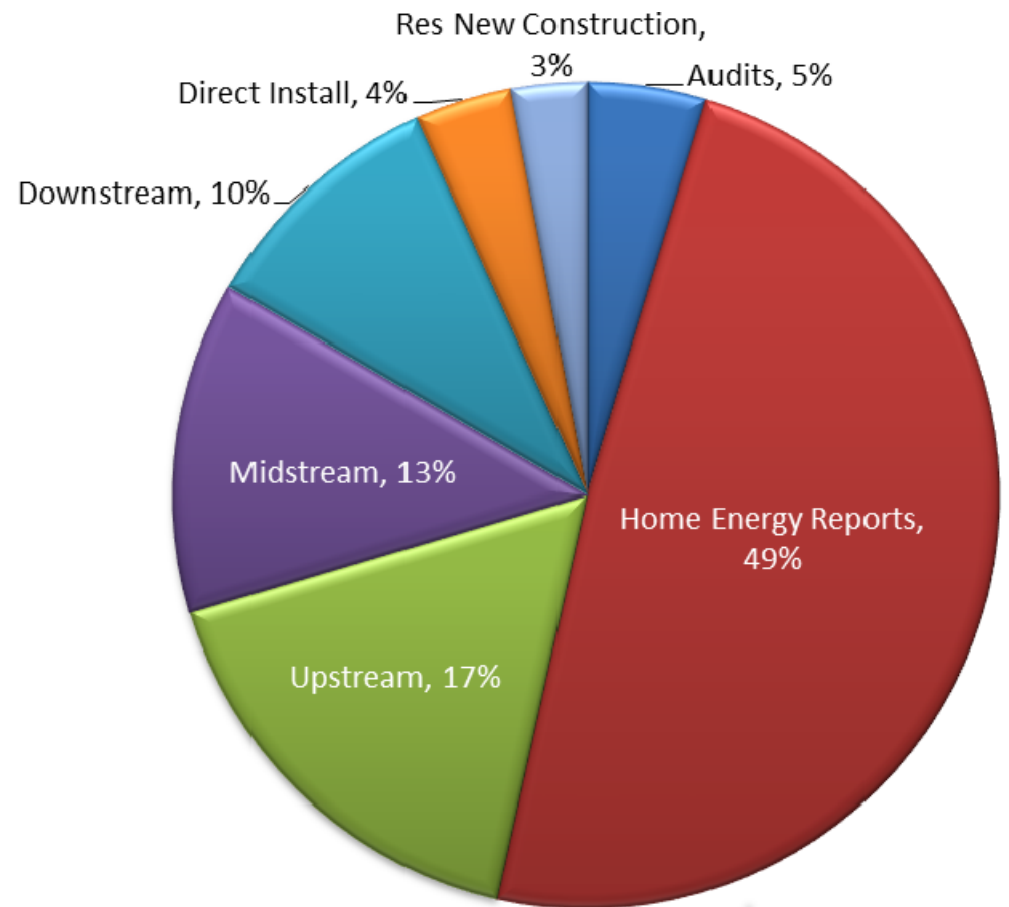


Residential Electrical Savings by Delivery Type

2000



2014





Full Surround Market Intervention

At Home

Your Home Energy Report
Account number: [REDACTED]
Report period: 03/15/14 - 03/15/14

Last 12 Months Household Comparison
This year 20% MORE energy than efficient similar homes. This costs you about \$88 EXTRA per year.

Last Month Household Comparison
You used 24% more than efficient similar homes.

What homes are compared?
Similar Homes: Approximately 200 occupied nearby homes that are similar to yours in size, age, and heat/cool load.
Efficient Similar Homes: The most efficient 5 percent of similar homes.

An Average Day Last Month
On average, you used the most from 7 - 9 pm. Think about what uses electricity during this time.

Quick Fix
Turn off lights when not needed. It's a common misconception that turning a light off and on consumes more energy than leaving it on all the time. This is not the case.

Smart Purchase
Use and switch off power strips. Many electronic devices that draw power when they are turned off. These are called "vampire devices" waste electricity throughout the day.

Great Investment
Choose an efficient television. Save large flat screen televisions use more energy than a refrigerator. When shopping for a new television, look not only for a feature, but also for an energy star.

SAVE UP TO \$45 PER YEAR

Important information about your new rate-of-use bill

Online

EMERGENCY | Safety | About | Search | GO | ENGLISH

MY HOME | MY BUSINESS | BUSINESS TO BUSINESS

My Bill & Account | Service Requests | Outages | Find Ways to Save | Additional Services

My Account

Manage Your Account Quickly and Easily
It's simple online.
[View & Pay Bill](#)
[Start or Stop Service](#)
[Help Me Pay](#)
[Ways to Save](#)
[Outages](#)

Alerts: ver en español | 3 Alerts

Driving Toward a Cleaner Future
If all goes as planned, PG&E will install 25,000 new electric vehicle chargers in commercial and public places throughout California.
[Learn More >>](#)

Save up to 20% with SmartRate™
Enroll in the optional SmartRate Plan, and you could see savings on your summer electric bills. It's risk free to try with Bill Protection.
[Learn More >>](#)

Tips to Save Your Business Money
Learn how California businesses can lower their energy use and utility bills with these helpful how-to's and guides.
[Get the Resources >>](#)

[Connect With Us](#) | [Electric Vehicles](#) | [Your Online Options](#)

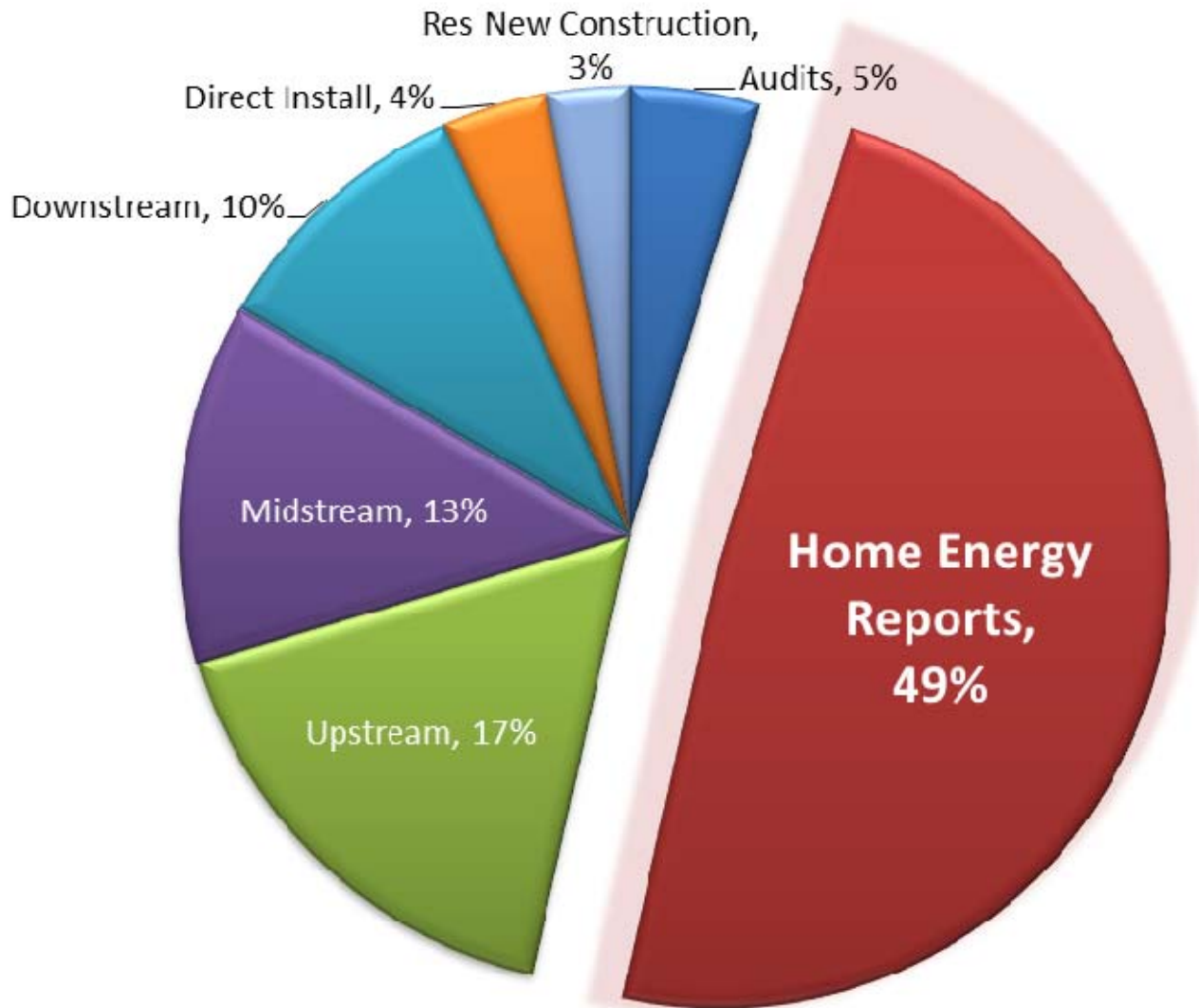
In Stores



Trade Pros



Residential Electrical Savings by Delivery Type 2014





Your Home Energy Report

Account number: [REDACTED]
Report period: 02/23/11 - 03/23/11

We are pleased to provide this personalized report to help you save energy.

The purpose of the report is to:

- Provide information
- Help you track your progress
- Share energy efficiency tips

More information is available at www.pge.com/myenergy

BOB SMITH
555 MAIN STREET
SAN FRANCISCO CA 94114

Last Month Household Comparison

You used **28% MORE** energy than efficient similar homes.



How you're doing:

Great 😊 😊

GOOD 😊

More than average

* This energy index combines electricity (kWh) and natural gas (therms) into a single measurement.

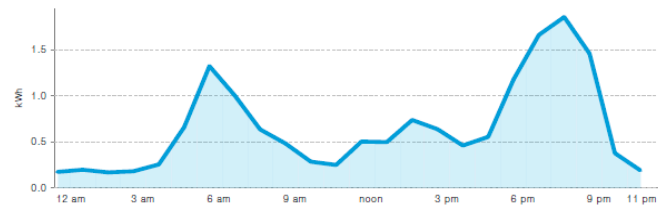
■ **Similar Homes:** Approximately 100 occupied nearby homes that are similar in size to yours (avg 1,850 sq ft) and have gas heat

■ **Efficient Similar Homes:** The most efficient 20 percent of similar homes

Are we comparing you correctly?
Update your home information by visiting: www.pge.com/myenergy

An Average Day Last Month

On average, you used the most from 7 - 9 pm. Think about what uses electricity during this time.

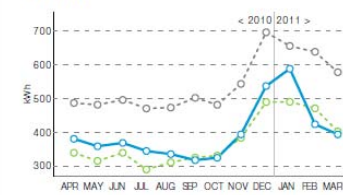


Turn over for savings →

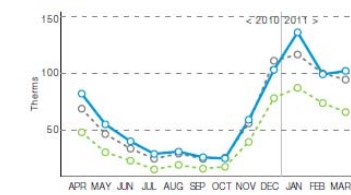
Last 12 Months Household Comparison

You used **26% MORE** energy than efficient similar homes. This costs you about **\$378 EXTRA** per year.

⚡ **Electricity** | 6% more electricity than efficient similar homes



🔥 **Natural Gas** | 53% more natural gas than efficient similar homes



Key: ■ Your Home ■ Similar Homes ■ Efficient Similar Homes

Action Steps | Personalized tips chosen for your home

Great Investment

A big idea for big savings

Buy ENERGY STAR® appliances

The Department of Energy tests the efficiency of household appliances and electronics. The best earn the ENERGY STAR label. In 2010, the average household saved about \$150 thanks to this program.

The ENERGY STAR label can be found on efficient models of many products. Qualified models often run more quietly, last longer, and are more convenient than conventional models.

Visit www.energystar.gov for details.

SAVE UP TO **\$515** per year



For answers, visit www.pge.com/myenergy

Great Investment

A big idea for big savings

Choose an efficient dishwasher

New ENERGY STAR® qualified dishwashers use 10% less energy than conventional machines on average.

Choose a model with an "air dry" setting that allows you to turn off the heat dry function. Also look for a "light" or "energy-saving" cycle to use when your dishes are only slightly dirty.

We offer a rebate of up to \$50 for an efficient dishwasher (note

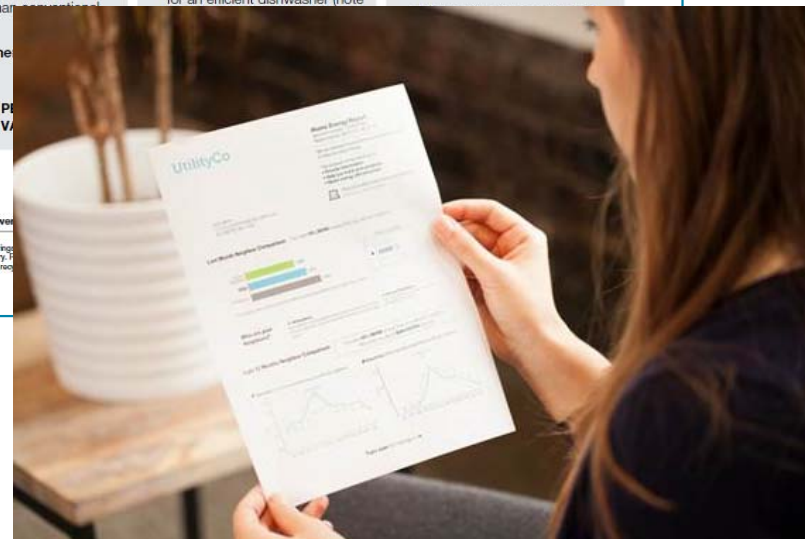
Smart Purchase

Save a lot by spending a little

Make sure refrigerator seals are tight

If you're not prepared to replace an old refrigerator, you can still save by improving its efficiency. Close the door on a dollar bill, then slowly pull it out. If there's no resistance, the seal is leaking cold air.

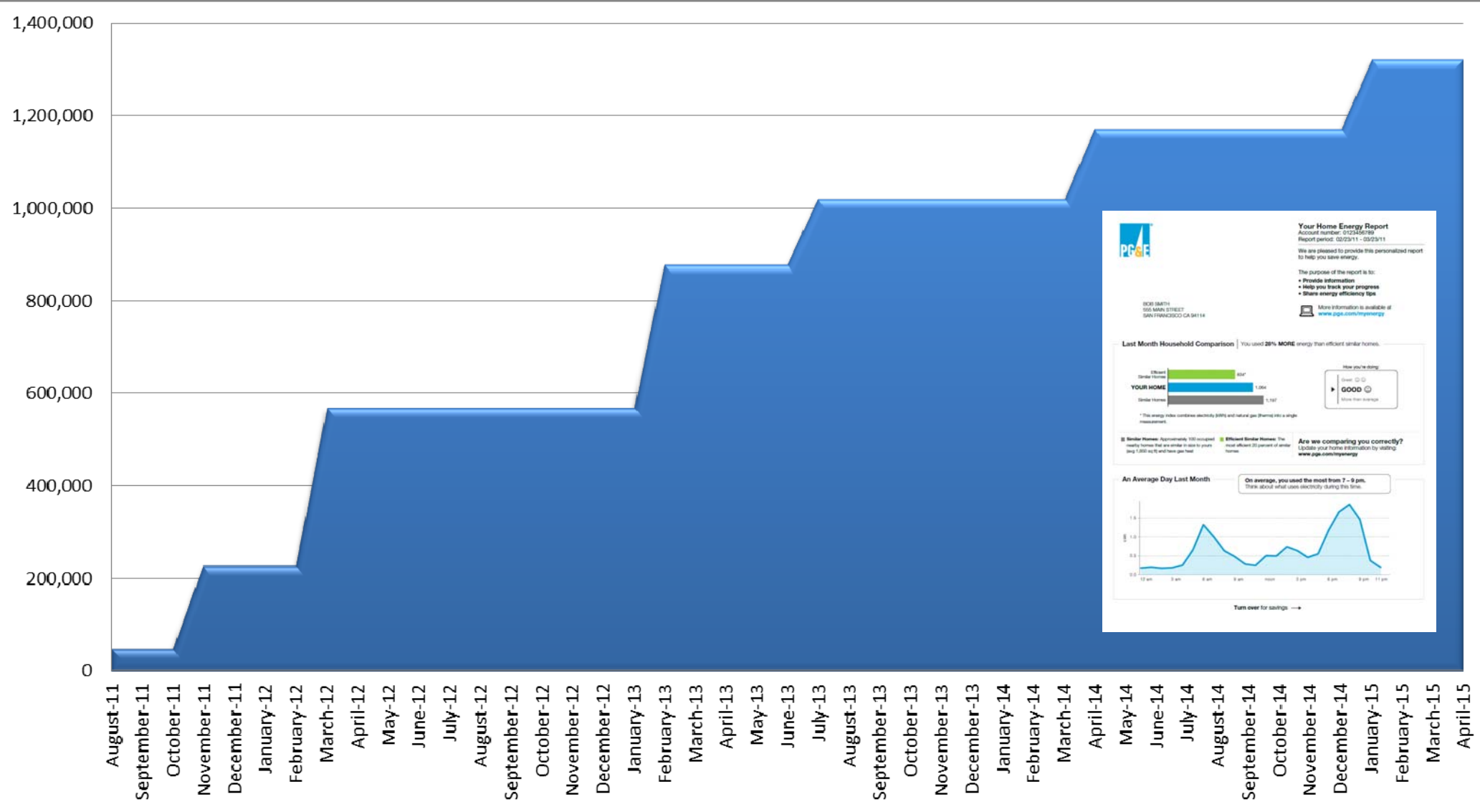
Parts suppliers carry replacement seals that you can install yourself by following instructions from your refrigerator owner's manual.





Home Energy Report

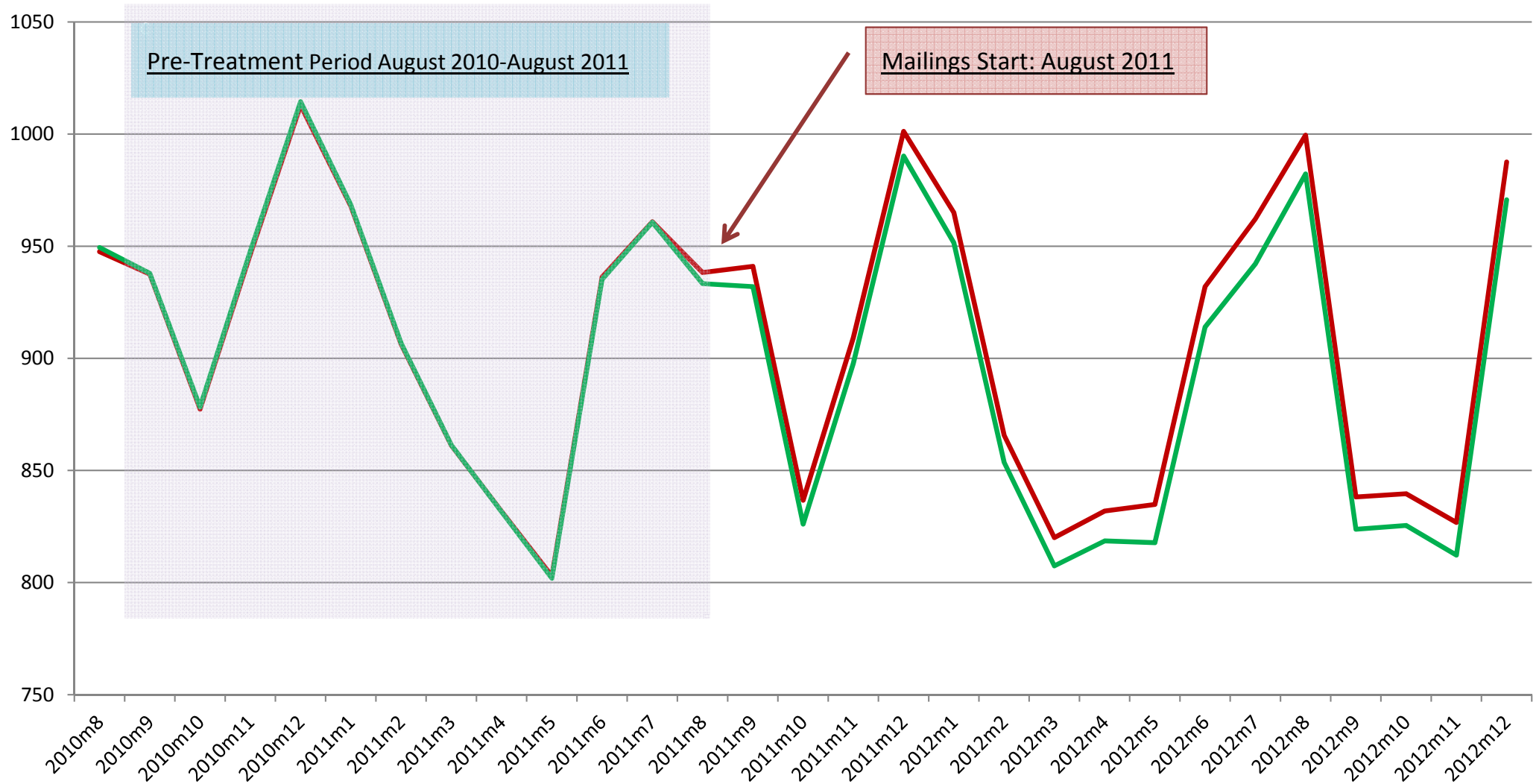
- More than 500 GWh saved overall (equivalent to powering nearly 75,000 homes for one year)
- More than \$50 million in customer savings





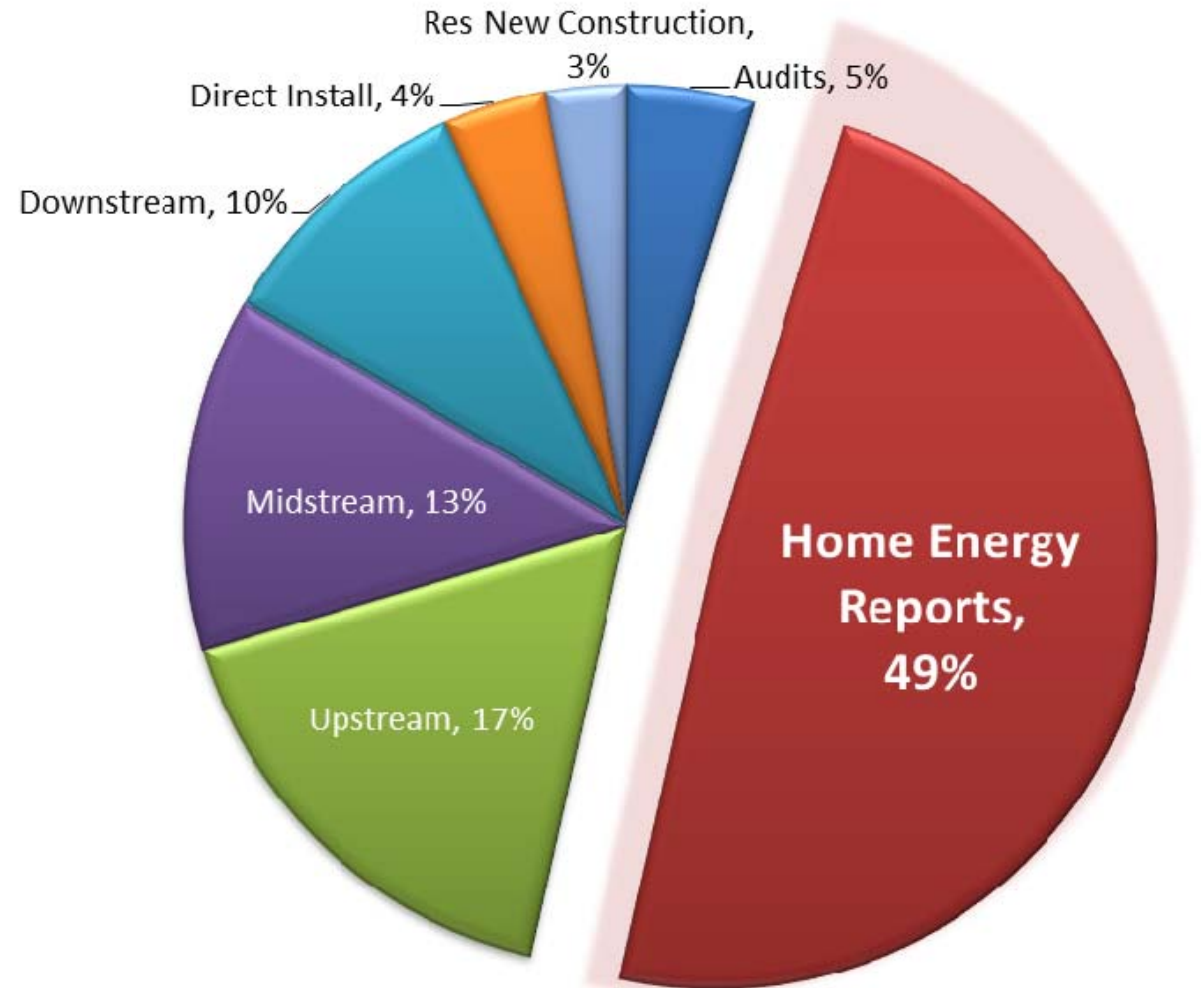
Home Energy Reports

Control kWh Treatment kWh



Source: PG&E Interval Data

**Residential Electrical Savings by Delivery Type
2014**



Upstream

- Primarily lighting incentives

Midstream

- Home upgrades
- Pool pumps
- Multifamily EE rebates

Downstream

- Appliance rebates (fridges, washers)

Direct Install

- Government partnership programs and third parties
- “Modest income” programs

Audits

- Residential customer surveys (mail, e-mail, phone, in-person)

Customer groups who think, act, and believe similarly are personalized. Everyone has a “persona” designation and belongs to a group.

Gadget Family



- **Affluent, established with large homes**
- **Above normal energy usage given their requirements**
- **Community-involved, Green-minded, Time-starved**

Heart & Home



- **Low-to-moderate income in smaller homes**
- **Do-it-yourselfers**
- **Traditional channels**

Eco-active Go Getters



- **A mix of renters and homeowners who move frequently**
- **Bay Area and North Coast**
- **Green-minded, Energy Efficient, and Low Usage**



Smart AC Targeting: Key Insights

Current Customers

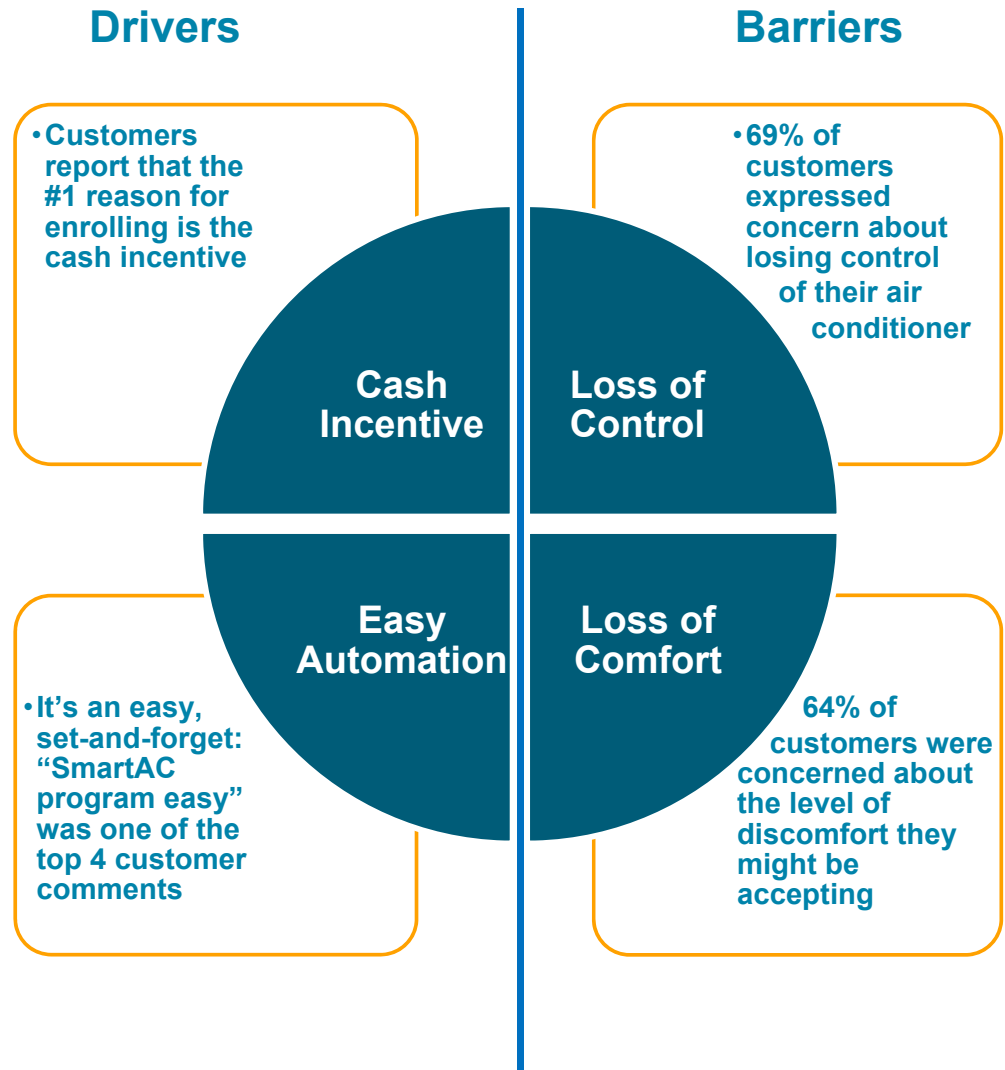
Leading Personas

- Way Wired 31%
- Heart & Home 23%
- Gadget Family 11%

Customers Targeted for Acquisition

#1 Growth Persona

- Living for Today





Smart AC: Acquisition - Communication Overview

E-mail

Web



An easy **\$50** for you.
An easy way to help California.



With the PG&E SmartAC™ program you can help protect your community's energy supply while keeping the power grid strong.¹ Plus, you can help yourself to \$50. Best of all, you can opt out for any reason, at any time, with no penalty.²

Here's how it works:

- PG&E will install a free SmartAC device on your central air conditioner.
- On hot summer days, when the demand for electricity is the highest, PG&E may send a signal to your SmartAC device, allowing your air conditioner to use less power.³
- The SmartAC program season runs from May 1 – October 31.
- Your system fan will continue to circulate air, keeping you comfortable.⁴

These event days are infrequent, and last from one to six hours.⁴

Enroll now to help keep the power grid strong and prevent interruptions. To learn more, visit pge.com/SmartAC or call 1-866-908-4916.

Sign Up



Easy and rewarding.

There's no appointment necessary.⁵ A few weeks after your device is installed, we'll send you a one-time check for \$50.

[Enroll Now](#)

You're in control.

Opt out at any time—just call 1-866-908-4916 or visit pge.com/SmartAC to restore your previous AC settings.²

[Learn More](#)

MY HOME | MY BUSINESS | BUSINESS TO BUSINESS

My Bill & Account | Service Requests | Outages | **Find Ways to Save** | Additional Services

My Account ▾

- Rate Plan
- Standard Base Plan
- Find My Best Plan
- Rate Changes
- Energy Alerts
- Energy Metering
- SmartAC™
- Do I Have a SmartAC Device?
- Event Days
- SmartAC Meters
- Property Managers
- SmartAC
- SmartRate™
- SmartAC Use Plan
- SmartAC Analysis & Alerts
- SmartAC Money Saver
- SmartAC and Renewables
- SmartAC Savings & Rebate Programs
- SmartAC Incentive Programs
- SmartAC In Electric Vehicles
- SmartAC Energy Savings Tips
- SmartAC Resources
- SmartAC in Energy CA

SmartAC™ Is an Easy \$50 for You
...and an easy way to help California.

[Enroll Now](#)



It's a win-win opportunity.

Sign up for our SmartAC program and we'll install a free SmartAC device on your air conditioner and give you \$50 for participating. Then, if there is an energy shortage between May 1 and October 31, PG&E will send a signal to your SmartAC device directing your air conditioner to run at a lower capacity. Reducing your energy usage will help prevent power interruptions for you and your neighbors.

[Learn More >](#)

Joining is simple and free.

Signing up is easy, costs nothing and pays you a reward—plus you'll be helping prevent power interruptions during the time when the power grid is typically under the most strain.

[Check Your Eligibility >](#)

Now sit back and relax.

You stay comfortable and in control. The SmartAC device automatically does all the work. There is nothing you need to remember. If a SmartAC event is called at a time that's inconvenient for you, you can easily return your air conditioner (AC) to its normal settings.


[Learn More >](#)

[Enroll Now >](#)

Already Enrolled?

- Manage your device.
[Go to SmartAC Manager >](#)

SmartAC Tech Support

-  Call 1-866-908-4916 or email us [SmartAC](#).

[Enroll Now](#)

[EMERGENCY](#) | [Safety](#) | [About](#) | [GO](#) [ENGLISH](#) ▼

MY HOME | **MY BUSINESS** | BUSINESS TO BUSINESS

My Bill & Account | Service Requests | Outages | Find Ways to Save | Additional Services

My Account ▲

Forgot Username or Password?
[Register](#)

Log In

Manage Your Account Quickly and Easily

It's simple online.

- [View & Pay Bill](#)
- [Start or Stop Service](#)
- [Help Me Pay](#)
- [Ways to Save](#)
- [Outages](#)

Alerta: ver en español
⚠️ 3 Alerts ▼



Driving Toward a Cleaner Future

If all goes as planned, PG&E will install 25,000 new electric vehicle chargers in commercial and public places throughout California.

[Learn More »](#)



Save up to 20% with SmartRate™

Enroll in the optional SmartRate Plan, and you could see savings on your summer electric bills. It's risk free to try with Bill Protection.

[Learn More »](#)



Tips to Save Your Business Money

Learn how California businesses can lower their energy use and utility bills with these helpful how-to's and guides.

[Get the Resources »](#)

Logged in as alina lawrence | Contact Us | Logout

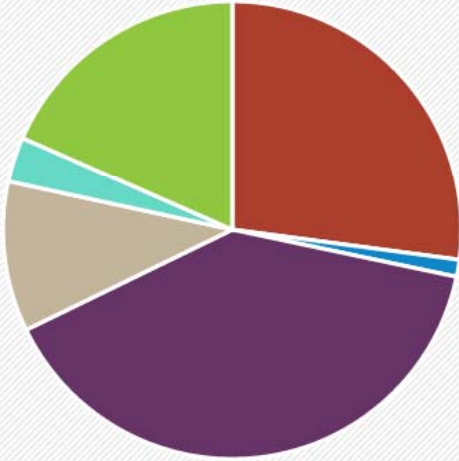
My Energy

Overview | Pay & Manage | My Usage | Ways to Save | Community

My Plan to Save | Ideas & Advice | Home Energy Checkup

Home Energy Checkup

Click a section for more information.









[Edit Answers](#)

The percentages shown here are estimates.
Estimates are based on your energy use and the information you provided about your home. [Learn More](#)

Thinking about installing solar panels?
Try our [solar analysis tool](#) to better understand how implementing energy efficiency first can reduce the cost of your solar system.

Top 5 tips for your home

-  [Give the gift of ENERGY STAR®](#)
13 people do this
-  [Program your thermostat](#)
43,928 people do this
-  [Lower your thermostat a few degrees in the winter](#)
1,257 people do this
-  [Install efficient showerheads](#)
42,200 people do this
-  [Weatherstrip windows and doors](#)
15,357 people do this

 [Print my summary](#)  [Download PDF](#)

Webrooming = 69%

Showrooming = 46%



Connected in-store experiences leverage both online and offline



Creating New Tools

Microsoft Excel ribbon: File, Home, Insert, Page Layout, Formulas, Data, Review, View, Acrobat

Clipboard: Paste

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: \$, %, .00, .00

Conditional Formatting, Format as Table, Cell Styles, Insert

Address Bar: B28, fx, 4158####

Columns: A, B, C, D, E

Row 1: **Clothes Washer Most Efficient** Rebate Code: CWME

Row 2: For more information, please visit www.pge.com/homemoneysaver Rebate Code: CWMEF (Multifamily Common Space - ONLY)

Row 3:

Row 4: **Important Notice:** Rebates will be decreased to \$50 effective January 1, 2015. Multifamily Common Area Clothes Washers will continue to receive a rebate of \$175 for qualifying products through 2015.

Row 5:

Brand	Model	Volume (cubic feet)	Modified Energy Factor (MEF)	Water Factor (WF)
AMANA	NFW5800D*+	4.17	3.2	3
CROSLEY	CFW7400**	3.86	3.25	2.8
ELECTROLUX	EIFLS60**	4.3	3.33	2.8
ELECTROLUX	EWFLS70**	4.42	3.29	2.8
FRIGIDAIRE	FAFS4073**	3.81	3.21	2.8
FRIGIDAIRE	FAFS4174**	3.86	3.21	2.7
FRIGIDAIRE	FAFS4474**	3.81	3.21	2.9
FRIGIDAIRE	FAFW3921**	3.68	3.35	2.9
FRIGIDAIRE	FFFSS115**	3.86	3.21	2.8
FRIGIDAIRE	FFFW5100**	3.86	3.25	2.8
KENMORE	4107#21#	5.16	3.45	3
KENMORE	4107#31#	5.18	3.45	3
KENMORE	4108#21#	5.16	3.45	3
KENMORE	4108#31#	5.18	3.45	3
KENMORE	4116#####	4.28	3.3201	2.717
KENMORE	4118#31#	3.95	3.2	3
KENMORE	4128#31#	3.95	3.2	3
KENMORE	4138#41#	4.26	3.2	3
KENMORE	4153#21#	4.26	3.4	2.9
KENMORE	4154#21#	4.26	3.4	2.8
KENMORE	4157#21#	4.26	3.3	3
KENMORE	4158#####	4.49	3.2978	2.717
KENMORE	4167#21#	4.26	3.3	3
KENMORE	417.4112**	3.7	3.35	2.9
KENMORE	417.4112*41	3.86	3.25	2.8
KENMORE	4198#####	5.18	3.45	3
KENMORE	592-4933*	3.96	3.35	2.9
KENMORE	592-4934*	3.96	3.35	2.9
KENMORE	592-4935*	3.96	3.35	2.9
KENMORE	592-4936*	4.29	3.32	2.9
KENMORE	592-4937*	4.29	3.32	2.9

Refrigerators Rated for Energy Efficiency. Shop from 1,054 models.

Save hundreds on electricity AND save on your purchase. Your electric company and Energize ConnectOut offer a rebate for any ENERGY STAR-qualified refrigerator with an Energy Score of 75 or above. Click on any blue rebate button to learn how to receive your award. Using the controls below you can easily narrow down the ranking to find the energy-smart Fridge that is right for you. TrueCost are shown for 12 years. Click for personal settings

SHOW FILTERS Price Type Brand 782 Refrigerators

CLICK TO SORT

Model/Popularity	Capacity	Energy Efficiency	Energy Cost	Purchase Price	TrueCost
Kenmore 70722	16.7 CUBIC FEET	100 OUT OF 100	\$746 OVER 12 YEARS	\$612	\$1,358 TRUECOST
Frigidaire FGU1849LE	18.18 CUBIC FEET	98 OUT OF 100	\$785 OVER 12 YEARS	\$804	\$1,590 TRUECOST
Maytag MSBXXGMYYV	19.0 CUBIC FEET	97 OUT OF 100	\$809 OVER 12 YEARS	\$760	\$1,569 TRUECOST
Maytag MSBXXGMYM	19.0 CUBIC FEET	97 OUT OF 100	\$809 OVER 12 YEARS	\$945	\$1,754 TRUECOST

Electrolux EI27BS16JS Refrigerator Energy Efficiency

The Electrolux EI27BS16JS is a highly energy efficient french door refrigerator with a total capacity of 26.7 cubic feet and a freezer volume of 7.7 cubic feet.

from \$2,063

Summary TrueCost Energy Efficiency Rebates Price Local Stores EcoView Features Popularity

Highly energy efficient and very popular. ✓

price of \$2,063 is stable

is your TrueCost (purchase + energy - \$50 rebate) over 12 years using your local Pacific Gas & Electric Co rate.

from 45 user reviews. It's in the Top 30 best selling products.

These are some models with similar capacity we also like:

Local Stores. Find retail stores at your location that carry Refrigerators.

Where are you?
San Francisco, CA 94117, United S

Target - San Francisco West
2675 Geary Blvd
San Francisco, CA 94116
(415) 790-5280

Best Buy - Geary Blvd
2675 Geary Blvd
San Francisco, CA 94116
(415) 433-4363

Contractors Appliance Source
3450 Geary Blvd
San Francisco, CA 94118
(415) 608-8434

Cherri's
727 Valencia St
San Francisco, CA 94110
(415) 864-2111

Doc Culinary Resource
1869 Mission St
San Francisco, CA 94133

An Experience Customers Know and Prefer





Co-branded signs



Height of promotion



End caps sales



Staff Training



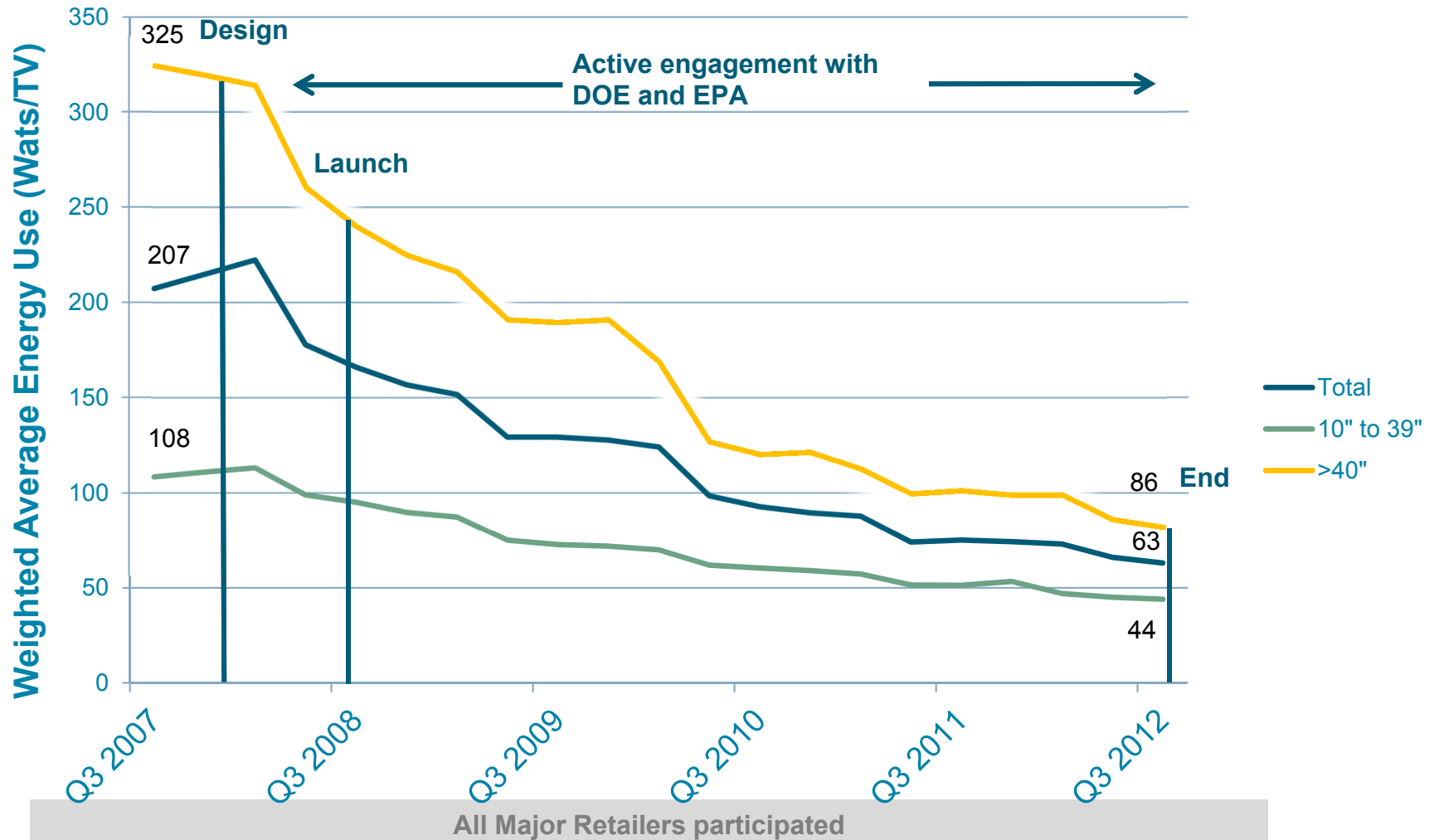
Price reduction





Midstream Collaboration: 2008-2012 TV Pilot

Estimated Energy Use by Size for New TVs

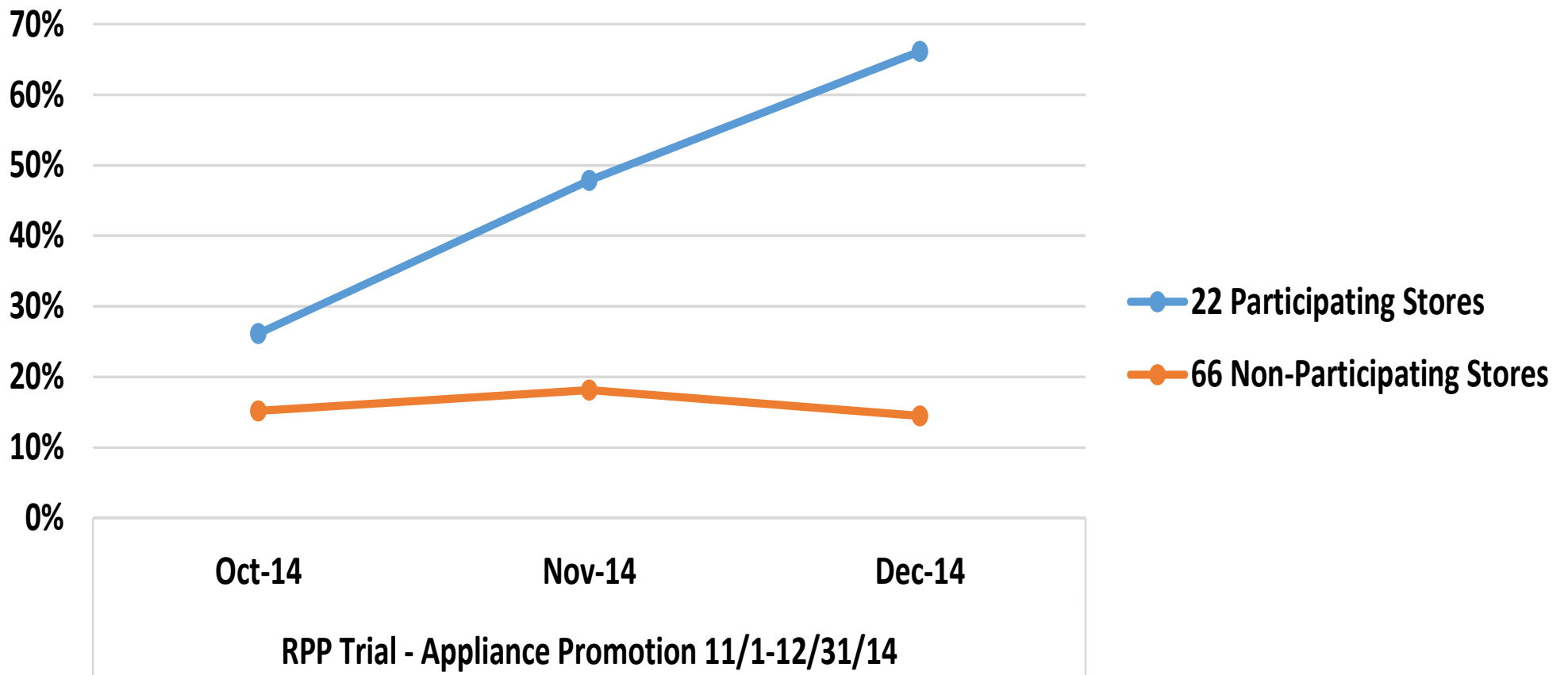




Midstream Collaboration: 2014 Retail Plug-Load Pilot

- Validate program operation, evaluation and performance

Market Share of Qualified Appliances





Home-Theaters-in-a-Box/Sound Bars
(ES + 15%)



Air Cleaners



Dryers



Room Acs?

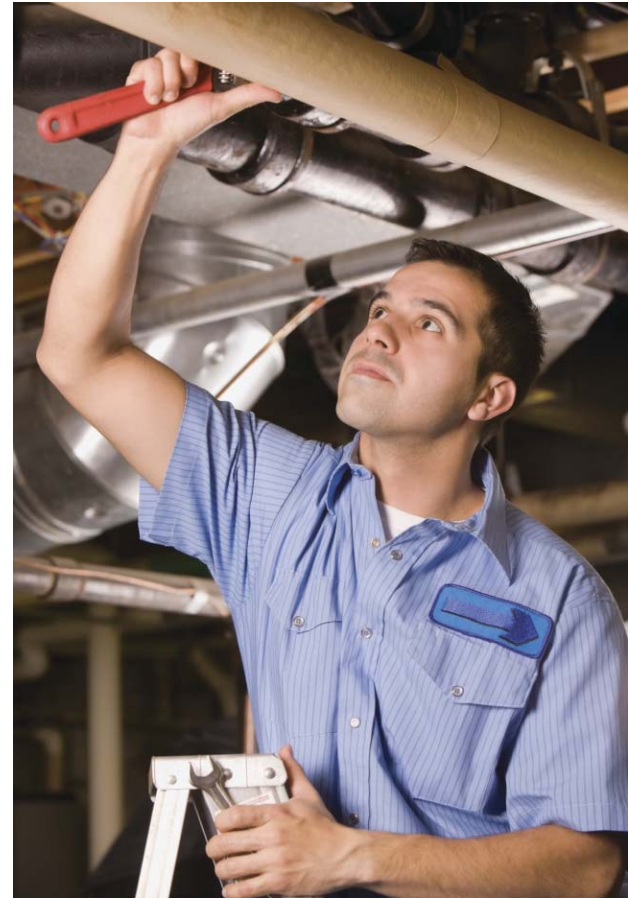


Freezers





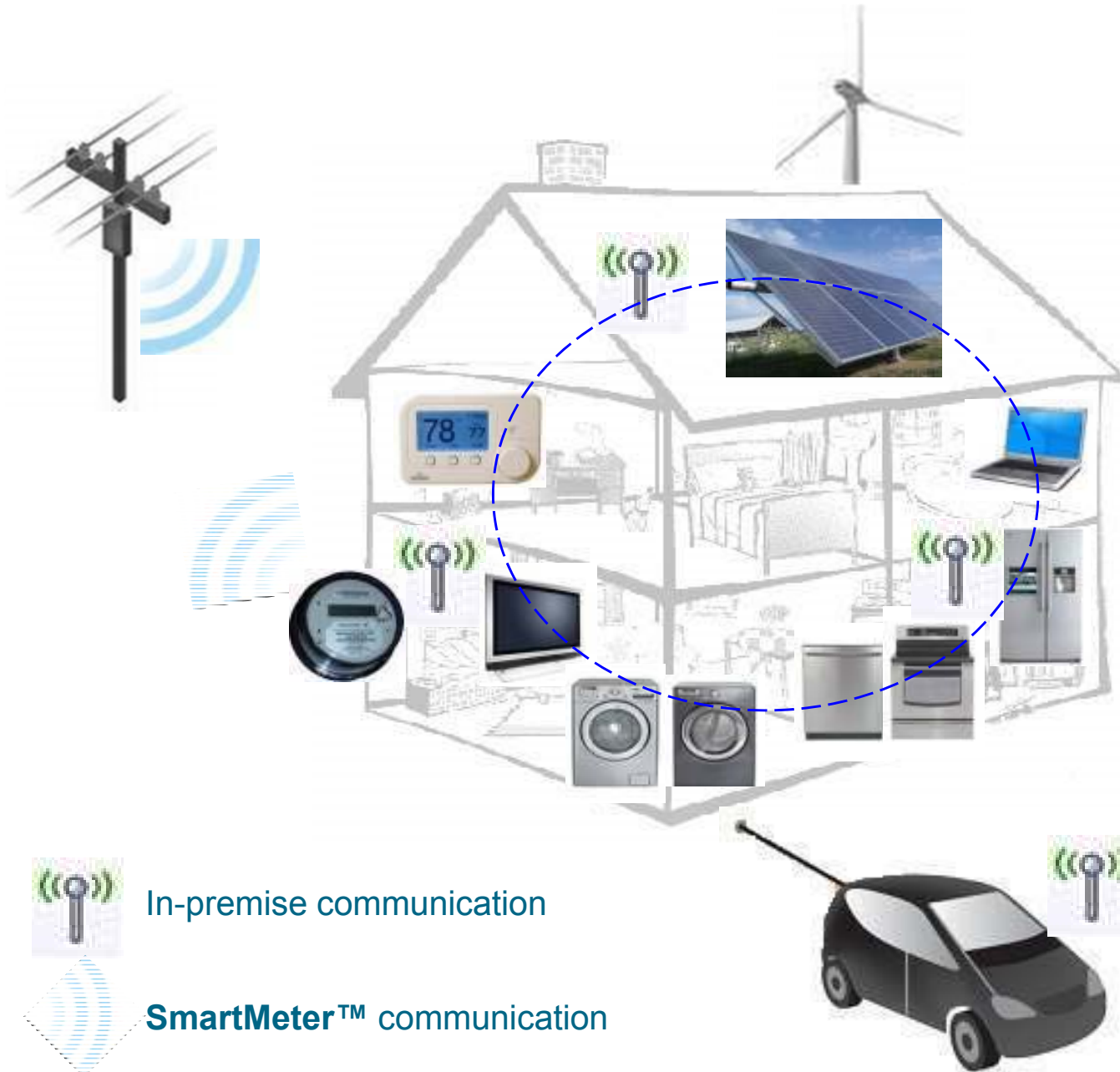
Trade Professionals



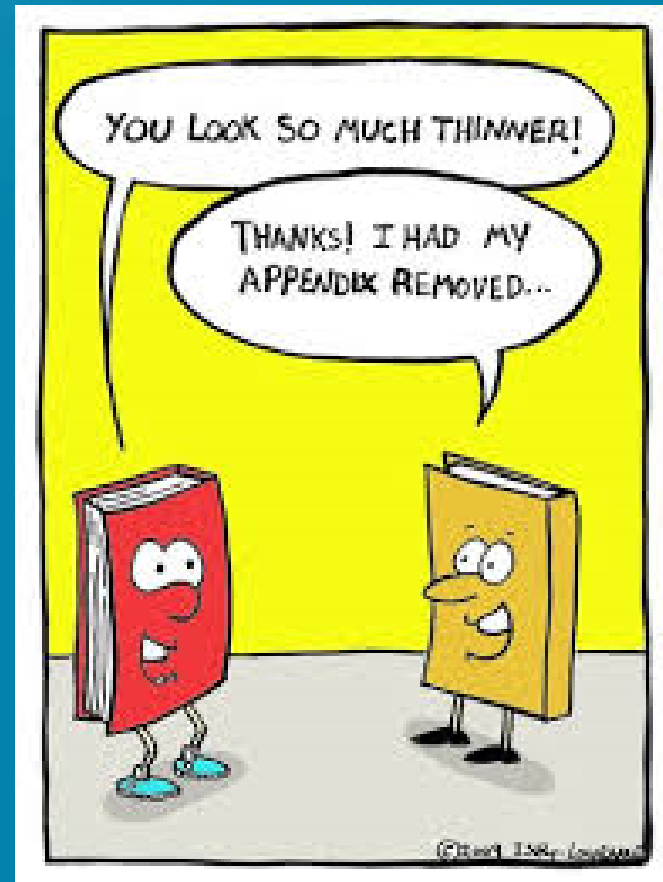




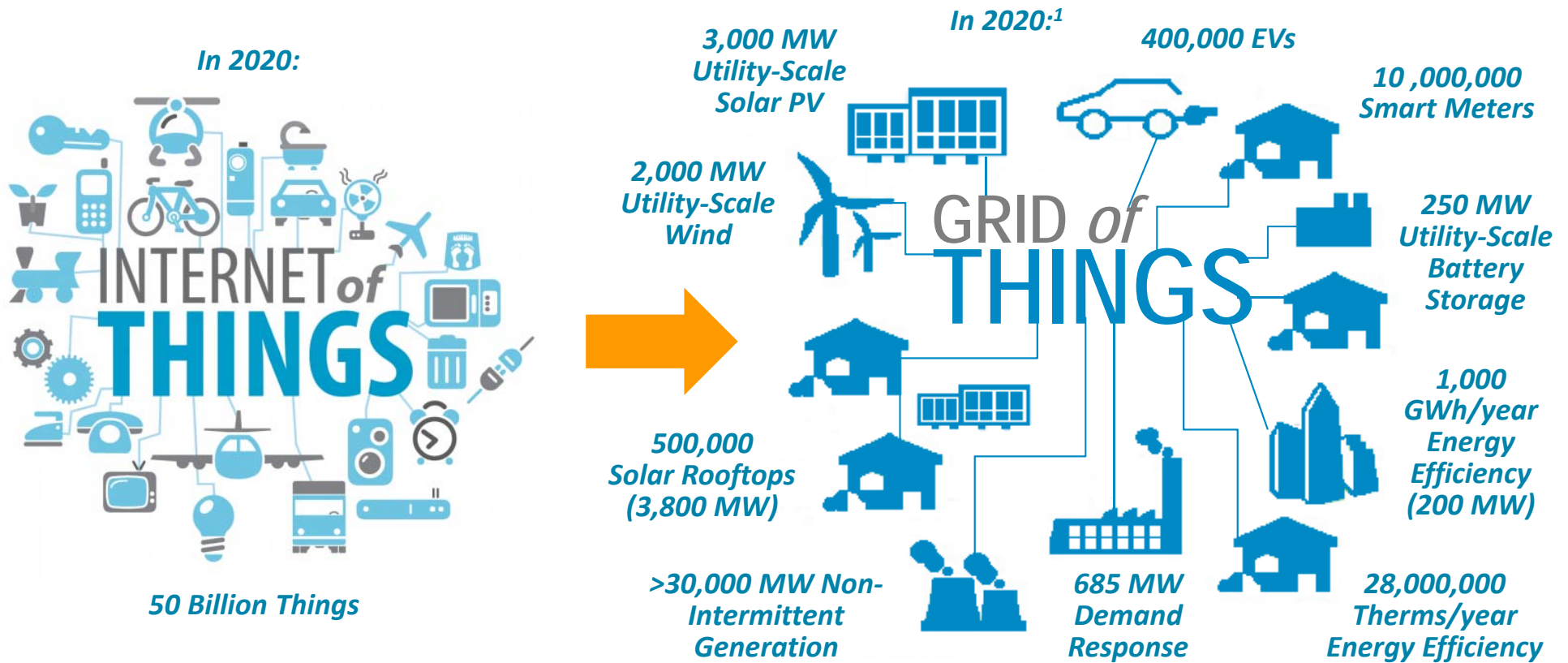
Future: Customer Energy Management ²⁶



Appendix



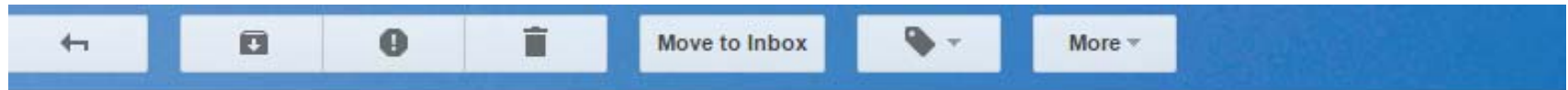
The Grid of Things: the always there, always on platform that enables all the products and services customers need to engage with and use energy



¹ Grid facts represent PG&E-specific, internal 2020 estimates for items in PG&E's service territory, excepting: 1) utility-scale solar and wind amounts, which include all resources under or expected to be under contract to PG&E in 2020; 2) utility-scale battery storage amounts, which use PG&E's transmission and distribution storage targets resulting from Assembly Bill 2514, assuming projects come online 2-3 years after the date procured; 3) energy efficiency estimates, which are based on 2014 PG&E goals; and 4) non-intermittent generation in PG&E's territory, which is sourced from the California Energy Commission's Energy Almanac (http://www.energyalmanac.ca.gov/powerplants/Power_Plants.xlsx).



Energy Alerts



Energy Alert From PG&E

Inbox x



Pacific Gas and Electric - Energy Alert <energyalert@pge.com>
to me

Mar 19 ☆



Dear Valued PG&E Customer,

We are sending this Energy Alert because you will likely move up to Tier 3 pricing for electricity use by the end of this billing period.

With Energy Alerts you can take steps to manage your energy use before receiving your monthly bill. Log on to My Energy at www.pge.com/myenergy to see your hourly electric usage up to the previous day, or change your notification preferences.

Under the PG&E tiered pricing structure, every residential customer starts in Tier 1, where electricity costs the least. As you use more electricity through the billing period, you move into Tier 2, Tier 3 and Tier 4. As you move into higher tiers, the cost for electricity increases.

If you have any questions about your bill or Energy Alerts, call us at [1-866-743-0263](tel:1-866-743-0263).

Customer Service Online
Pacific Gas and Electric Company

This message is related to Service Agreement 6060828267

* Please do not reply to this email.



We listen to what customers are telling us about their needs and wants, and how they think.

We have a long tradition of encouraging customers to share their voice:

- Qualitative & Quantitative Studies (Programs, Products, Rates, Touchpoints)
- Customer Satisfaction Surveys
- Brand Health Tracking
- Social Listening



Customer Segmentation Approach

- Leverage Internal and External Data for Deeper Understanding
 - Go beyond the energy profile to uncover behavioral, attitudinal and personality characteristics along with corresponding emotional levers
- Strive for Customer Centricity
 - Create representative “personas” for energy consumers and operationalize them throughout the organization
- Drive Results from Utilization of Personas
 - Develop more satisfying and efficient interactions
 - Influence and increase level of trust
 - Enable greater customer and business impact
 - Further our relationship/engagement opportunities using a holistic approach

Product Development



- Identify product gaps
- Understand customer impact
- Enhance existing products/tools

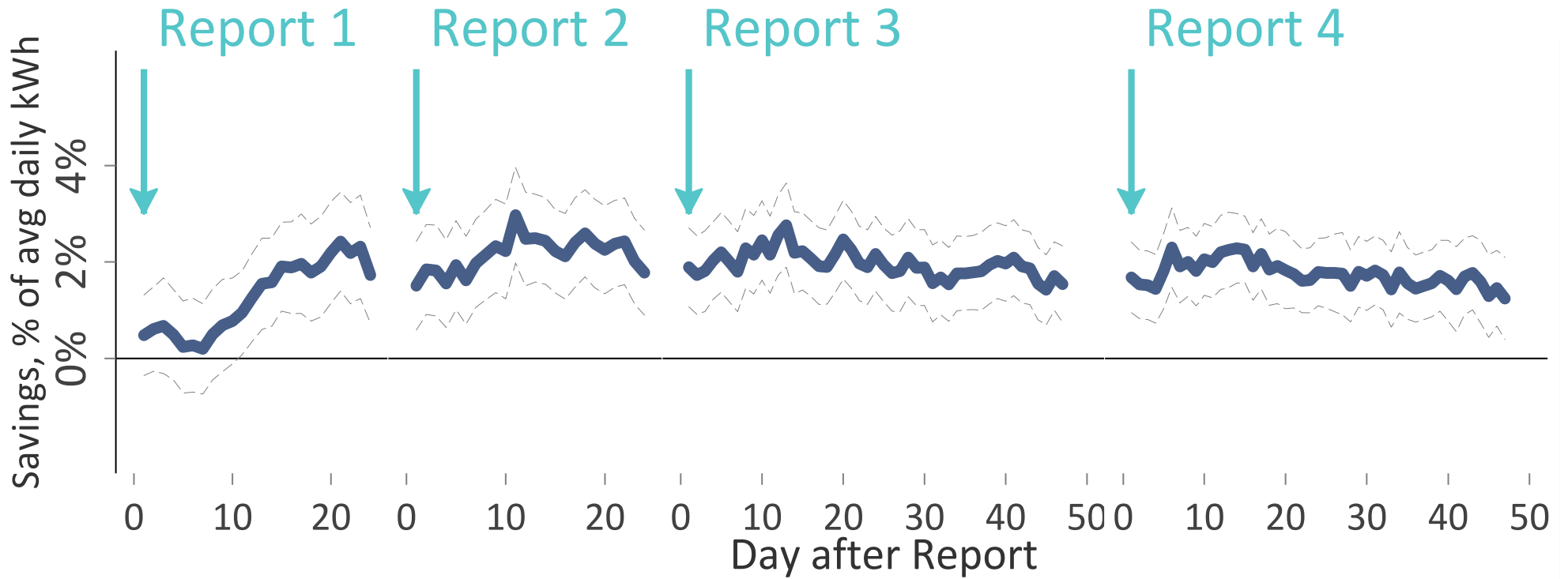
Operations



- Identify which segments drive higher cost
- Identify opportunities for efficiencies
- Gain insight into how processes fit with customer segments
- Assist evolving or developing processes



Insights from Smart Meter Data



Objective

Evaluate gross energy savings and effectiveness of EE facilitating features in multiple smart thermostats with focus on optimization software, occupancy sensing and geo-location.

Design

- Scaled Field Placement of multiple smart thermostats to evaluate effectiveness of EE facilitating features, such as occupancy sensing and geo-location.
- Targeting 1,000 units each
- Participation in this project requires manufacturer to provide subset of operating data (indoor temperature, set points, etc.)
- Incorporate existing customer data to keep cost down or as backup strategy for suboptimal participation, as feasible.

Potential Partners

- NEST
- Ecobee 3
- EnergyHub/RTA CT80
- Honeywell Lyric
- Earth Networks/Emerson





On the Horizon: Supply-Side DR Pilot

In 2015 & 2016, PG&E is launching:

- **Supply-Side DR pilot**
 - Allows vendors to bid DR capacity into the wholesale market

- **Excess Supply DR pilot**
 - Address situations of over-generation on the grid) to help enable residential aggregation for vendors interested in this alternative business model

Help prevent power shortages.

Help yourself to \$100.

The PG&E SmartAC™ program is designed to prevent power shortages for you and your neighbors.³ Enroll now and get \$100 for helping out.⁴

Take control of your comfort.

- Enroll now and PG&E will install a SmartAC device on or near your central air conditioning unit. A few weeks later we'll send you a check for \$100.
- On the hottest days between May 1 and October 31, PG&E may send a signal to activate your SmartAC device, which allows your air conditioner to run at lower capacity to help avoid power interruptions.⁴
- If an event is called at an inconvenient time, you have the option to easily return your air conditioner to its normal settings.²

Here's how it works:

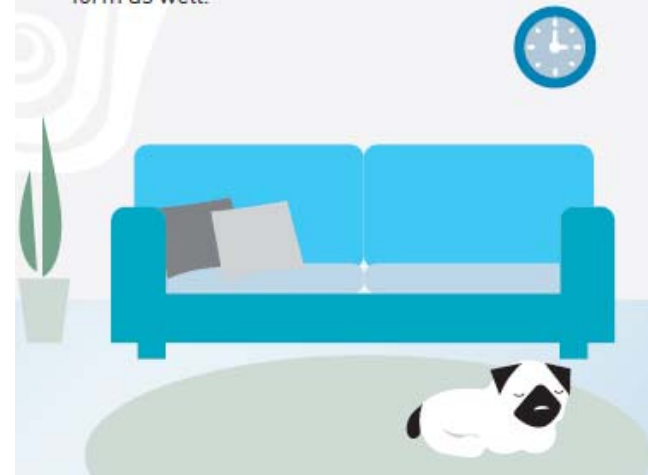
- For about 15 minutes of every half hour your air conditioner will operate normally. For the other 15 minutes your fan will run to circulate the air.
- These SmartAC events are infrequent and last between 1 and 6 hours.

The power to help California.

The SmartAC program helps PG&E avoid using less-efficient peak power plants. Help us protect the power supply and the environment. Join thousands of other Californians, and sign up for SmartAC.

Sign up now. It's easy.

Fill out the short form at the bottom of your letter, visit pge.com/smartac or call us at 1-877-932-0613. If you are a renter, please complete, sign and return the enclosed renter's form as well.



Utility Factors

- My Energy (41%)
- Uses Rebates (40%)
- Medium Sized Bills (48%)
- Longer Term Customer (81% 5+ yrs)
- Skew Toward SmartRate, SmartAC
- Electronic Payments (58%)

Demographics

- Higher Income (58% >\$100k)
- White Collar, Higher Education
- Over 45 (82%)
- Homeowner
- Higher Value Homes (47% >\$500K)
- San Jose, East Bay, San Francisco



Lifestyle

- Community Involvement (74% Donate)
- Exercise, Outdoors
- Politically Involved
- High Internet Usage (40% in top 2 deciles)
- Frequent Purchases Of Electronics, Appliances
- Online And Mail Purchases
- Green Living (28%)

Theories/Observations

- Trends toward early, easy solution adoption
- Fairly energy efficient, with lower bills, temperate areas
- Could drive more products to this group, but impact on energy may be less
- Home automation, remote management could lower even more

Utility Factors

- Low My Energy Enrollment (34%)
- Uses Rebates (30%)
- More likely to use SmRate, SmAC
- Medium to Low Energy Bill (96%)
- Payments by Mail (49%) And In Person (25%)

Demographics

- Low To Middle Income
- Detached Single Family Homeowners
- Smaller, Older Homes (82%)
- Somewhat Older Age (58% 55+ yrs)
- Singles or couples (62%)
- Only some with children (25%)
- Higher Rate Of Hispanics (24%)

HEART & HOME
12% 629,199

\$50
UP

NOW GET \$50 | **SAVE UP TO \$150/YR** IN ENERGY COSTS

For a **FREE** pickup, call 1-877-970-3610

Lifestyle

- Longer Length of Residence (64% 6+ yrs)
- Higher Rate of Retirement
- 'Do It Yourself'ers (18%)
- Low Internet Usage
- Skew Republican
- Make timely regular payments

Theories/Observations

- This group is fairly energy efficient, with smaller homes and less elaborate lifestyles keeping bills low
- However, they show a higher level of programs that incentivize them across several solution types
- Rebates appear to be timed to needed upgrades
- They may modify behavior given the right up front offer

Utility Factors

- My Energy (48%)
- Uses Rebates
- Some Have Pools
- Longer Term Customer (80% 5+ yrs)
- Larger Homes
- Energy Inefficient (96%)

Demographics

- Higher Income (61% 100k+)
- Likely Married/Partnered
- Older Children
- Homeowner
- Larger Higher Value Homes
- East Bay, San Jose, North Coast



GADGET FAMILY

6% 305,731

Lifestyle

- Community Involvement (73%)
- Outdoors (boating, hunting, hiking)
- High Internet Usage
- Purchases Electronics, Appliances (50% p2y)
- Green Living (30%)

Theories/Observations

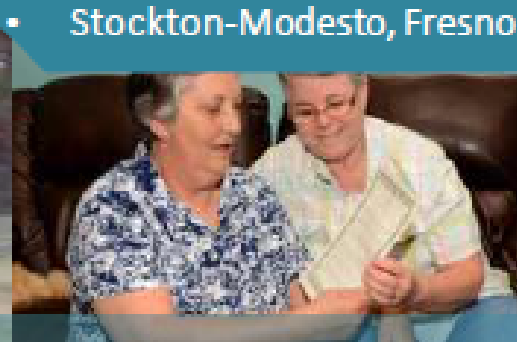
- Convenience May Be A Key Driver
- Engage When They Are Involved With Home Updates
- Could Be Early Adopter Of Certain Technologies
- Prospects For Integration And Bundling
- Good Group For New Product Pilots

Utility Factors

- My Energy (42%)
- Uses Rebates (27%)
- Energy Inefficient (98%)
- Longer Term Customer (72% 5+ yrs)
- Skew Toward SmartRate, SmartAC
- High Bills

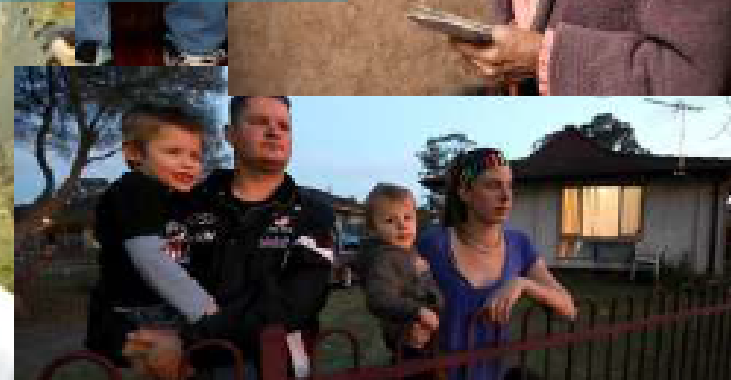
Demographics

- Lower Income (39% <\$50k)
- Multiple Adults in HH
- Middle Age or Older (24% 65+)
- Homeowner
- Larger, Older Homes (majority built before '84)
- Some Have Pools (24%)
- Stockton-Modesto, Fresno-Bakersfield, Sacramento



BEYOND THEIR MEANS

5% 257,369



Lifestyle

- Community Involvement (73%)
- Outdoors (camping, hunting, hiking)
- Health, Medical Interests
- Low Internet Usage (40% in bottom 5 deciles)
- Slight Skew Toward Retirees
- Missed Payments
- Multiple Payment Methods (30%)

Theories/Observations

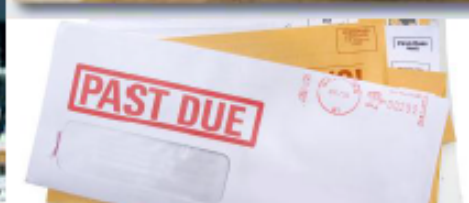
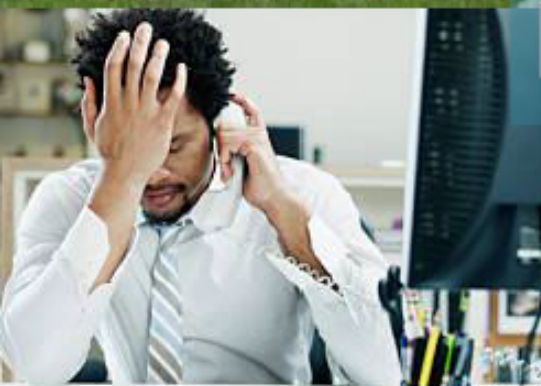
- Budget Is A Key Driver
- Would Benefit From Energy Savings Measures On Bill But Struggle To Afford Upgrades
- Could Take Advantage Of ESAP But Only Average Rate Of CARE Participants Indicates May Be Averse To "Charity"

Utility Factors

- My Energy (53%)
- Few Rebates
- CARE (41%)
- Medium to High Bill (70%)
- Somewhat Energy Inefficient (42%)
- Payments Both Electronic (55%) And In Person (48%)

Demographics

- Low To Middle Income
- Frequent Mover
- Younger (82%)
- Mix Of Renters & Homeowner
- Some With Children (35%)
- Stockton-Modesto, Fresno-Bakersfield
- Higher Rate Of Hispanics (27%)



Lifestyle

- Migratory Lifestyle
- Some Spanish Speakers (19%)
- High School, Vocational School
- Average Internet Usage
- Missed Payments (20%)
- Multiple Payment Methods

Theories/Observations

- While this group of customers shows a degree of being energy inefficient, they may lack the means to make significant upgrades
- Lifestage transitions may create opportunities to engage
- Savings are a motivator if the solution is easy and doable