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
Residential Approach Evolves

Early Years

Today

Forward Trends
Where do savings come from?

Residential Electrical Savings by Delivery Type

2000

- Res New Construction, 12%
- Upstream, 3%
- Downstream, 85%

2014

- Home Energy Reports, 49%
- Midstream, 13%
- Upstream, 17%
- Downstream, 10%
- Direct Install, 4%
- Res New Construction, 3%
- Audits, 5%

Source: PG&E internal data
Full Surround Market Intervention

At Home

In Stores

Online

Trade Pros
Home Energy Reports

Residential Electrical Savings by Delivery Type
2014

Source: PG&E internal data
At Home

Your Home Energy Report
Account number: [Redacted]
Report period: 03/20/11 - 03/25/11

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

The purpose of the report is:
- Provide information
- Help you track your progress
- Share energy efficiency tips

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

Last Month Household Comparison
You used 28% MORE energy than efficient similar homes.

<table>
<thead>
<tr>
<th>Similar Home</th>
<th>YOUR HOME</th>
<th>Efficient Similar Home</th>
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</thead>
<tbody>
<tr>
<td>1,016</td>
<td>1,167</td>
<td>1,116</td>
</tr>
<tr>
<td>(27%)</td>
<td>(27%)</td>
<td>(27%)</td>
</tr>
</tbody>
</table>

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

How you're doing:
- Good (☑)
- More than average

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.

<table>
<thead>
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<th>Time</th>
<th>Usage</th>
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<tr>
<td>10 am</td>
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</table>

Turn over for savings →

Last 12 Months Household Comparison
You used 28% MORE energy than efficient similar homes. This costs you about $578 EXTRA per year.

<table>
<thead>
<tr>
<th>Electricity</th>
<th>Natural Gas</th>
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</thead>
<tbody>
<tr>
<td>4% more</td>
<td>13% more</td>
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</tbody>
</table>

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 are labeled 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 can save energy and cost less over time.

Visit www.energystar.gov

Save up to $515

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. Look for a "light" or "energy saving" cycle to use when your dishes are only slightly dirty.

We offer a rebate of up to $60 for an efficient dishwasher.

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.

For answers, call 1-800-PG-E-START (743-3782) or visit www.pge.com
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

Pre-Treatment Period August 2010-August 2011

Mailings Start: August 2011

Source: PG&E Interval Data
Where do the savings come from?

**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)

Source: PG&E internal data

### Residential Electrical Savings by Delivery Type

**2014**

- **Upstream, 17%**
- **Midstream, 13%**
- **Downstream, 10%**
- **Direct Install, 4%**
- **Audits, 5%**
- **Res New Construction, 3%**

**Home Energy Reports, 49%**
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

Drivers
- Customers report that the #1 reason for enrolling is the cash incentive
- It’s an easy, set-and-forget: “SmartAC program easy” was one of the top 4 customer comments

Barriers
- 69% of customers expressed concern about losing control of their air conditioner
- 64% of customers were concerned about the level of discomfort they might be accepting

Sources: CES Survey for SmartAC, 2014
Targetbase End of Season Analysis – Persona by Percent of SmartAC Installations, 2014
CES Composite Survey, Hiner & Partners, 2013
Smart AC: Acquisition - Communication Overview

E-mail

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. Plus, you can help yourself to $50. Best of all, you can opt out for any reason, at any time, with no penalty.

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 highest, PG&E may send a signal to your SmartAC device, allowing your air conditioner to use less power.
- The SmartAC program season runs from May 1 – October 31.
- Your system fan will continue to circulate air, keeping you comfortable.

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

Web

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 to its normal settings.

Learn More →
Enroll Now →
Home Energy Check-Up

Home Energy Checkup

Click a section for more information.

Top 5 tips for your home

- **Give the gift of ENERGY STAR®**
  - 13 people do this
  - I'll do it  Already do it  No thanks

- **Program your thermostat**
  - 43,628 people do this
  - I'll do it  Already do it  No thanks

- **Lower your thermostat a few degrees in the winter**
  - 1,257 people do this
  - I'll do it  Already do it  No thanks

- **Install efficient showerheads**
  - 42,200 people do this
  - I'll do it  Already do it  No thanks

- **Weatherstrip windows and doors**
  - 15,357 people do this
  - I'll do it  Already do it  No thanks

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 investment.

Print summary  Download PDF
Webrooming VS. Showrooming

Webrooming = 69%  
Showrooming = 46%

Connected in-store experiences leverage both online and offline

http://merchantwarehouse.com/a-retailers-guide-to-webrooming
Creating New Tools

**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.

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An Experience Customers Know and Prefer
In Stores
Flexible Retail Strategies

- Co-branded signs
- Height of promotion
- End caps sales
- Staff Training
- Price reduction
All Major Retailers participated

Midstream Collaboration: 2008-2012 TV Pilot

Estimated Energy Use by Size for New TVs

Weighted Average Energy Use (Wats/TV)

Q3 2007  Q3 2008  Q3 2009  Q3 2010  Q3 2011  Q3 2012

Total

325 Design
207 Launch
108

Active engagement with DOE and EPA

10" to 39"

86 End
63
44

>40"

All Major Retailers participated

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

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<th>Nov-14</th>
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<td>22 Participating Stores</td>
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<tr>
<td>66 Non-Participating Stores</td>
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Trade Professionals
Future: Customer Energy Management

In-premise communication

SmartMeter™ communication
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

In 2020:

- 50 Billion Things
- 500,000 Solar Rooftops (3,800 MW)
- >30,000 MW Non-Intermittent Generation
- 2,000 MW Utility-Scale Wind
- 3,000 MW Utility-Scale Solar PV
- 10,000,000 Smart Meters
- 250 MW Utility-Scale Battery Storage
- 28,000,000 Therms/year Energy Efficiency
- 1,000 GWh/year Energy Efficiency (200 MW)
- 400,000 EVs
- 685 MW Demand Response

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).
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.

Customer Service Online
Pacific Gas and Electric Company

This message is related to Service Agreement 6060828267

* Please do not reply to this email.
Target Marketing

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
Benefits of Persona Segmentation

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

Savings, % of avg daily kWh

0% 2% 4%

Day after Report

Report 1  Report 2  Report 3  Report 4
PG&E’s Smart Thermostat EE Assessment

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
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. Enroll now and get $100 for helping out.

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.

- If an event is called at an inconvenient time, you have the option to easily return your air conditioner to its normal settings.

Here’s how it works:

- For about 15 minutes of every 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 (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 (82%)
- Smaller, Older Homes
- Somewhat Older Age (58% 55+ yrs)
- Singles or couples (62%)
- Only some with children (25%)
- Higher Rate Of Hispanics (24%)

**Lifestyle**
- Longer Length of Residence (64% 6+ yrs)
- Higher Rate of Retirement
- ‘Do It Yourselfers’ (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

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

### 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