



The ENERGY STAR® Retail Products Platform

Patrick Kilroy,
Navitas Partners on behalf of US EPA



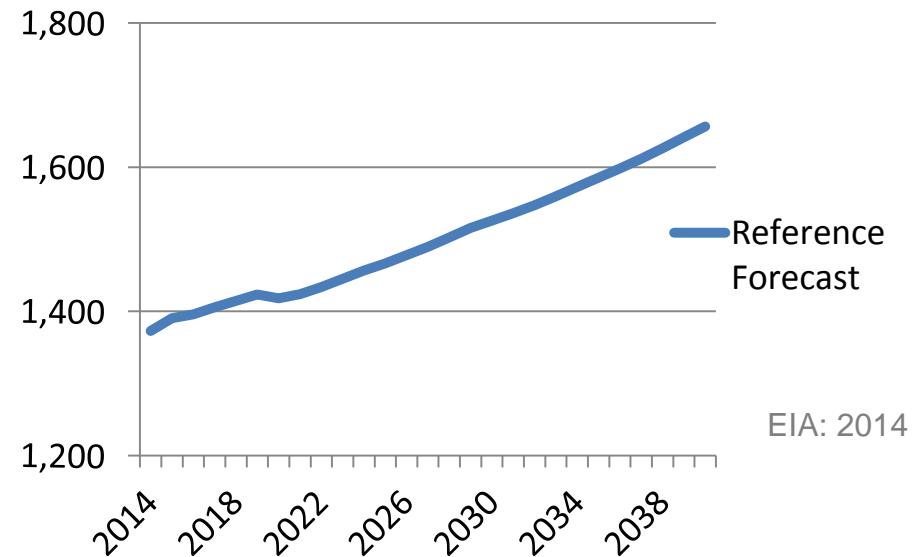
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Energy Market Trends

- Household consumption declining
- Sectorial consumption increasing
 - Population growth
 - Increase of electric devices
- Large, per unit savings dwindling

Residential Electricity Sales
2014-2040 (billion kWh)



Cost Effective Savings Harder to Achieve

Retail Market Trends

- Lower margins
- Growth is online, offline remains dominant
- Personalized marketing strategies
- Technology gives customers more control
- Big data - privacy concerns



**Top 10 US “Plug-Load” Retailers:
\$1 Trillion Revenue, yet 2.2% Median Net Profit**

Opportunity: Transform the way energy efficient products and messages are delivered

- Effective and efficient
- Leverage retailers' up and down market capabilities
- Enhance customer relationships
- Improve operations and data accuracy
- Promote regulatory policy and EM&V approaches supportive to innovation



Collaboration

- Critical to unlocking remaining energy efficiency potential
- Builds scale to influence markets
- Reduces costs for retailers and program sponsors
- Allows for local/regional personalization for program sponsors and retailers



Marketing Strategies

1. Price
2. Promotion
3. Placement
4. Positioning
5. Products
6. Profit



19 billion impressions: store, web and mobile
+150 opportunities per household to educate and market



The ENERGY STAR Retail Products Platform

- EPA will serve as coordinator and facilitator for the effort, and will communicate with regulators on the national level
- EPA will also help the group leverage the ENERGY STAR brand platform as part of its national scope

Task Forces

EM&V/Regulatory

Noah Horowitz – NRDC
Julie Colvin – PG&E

Data Requirements

Jon Clark – NEEA

Product Specifications

Peter Banwell – EPA
Michael Russom – VEIC

Legal Agreements

Larry Tabizon – SCE
Tim Michel – PG&E

Marketing

Linda Malek – SCE

Outreach

Tim Michel – PG&E
Noah Horowitz – NRDC
Jon Clark – NEEA



An Engaged Ecosystem

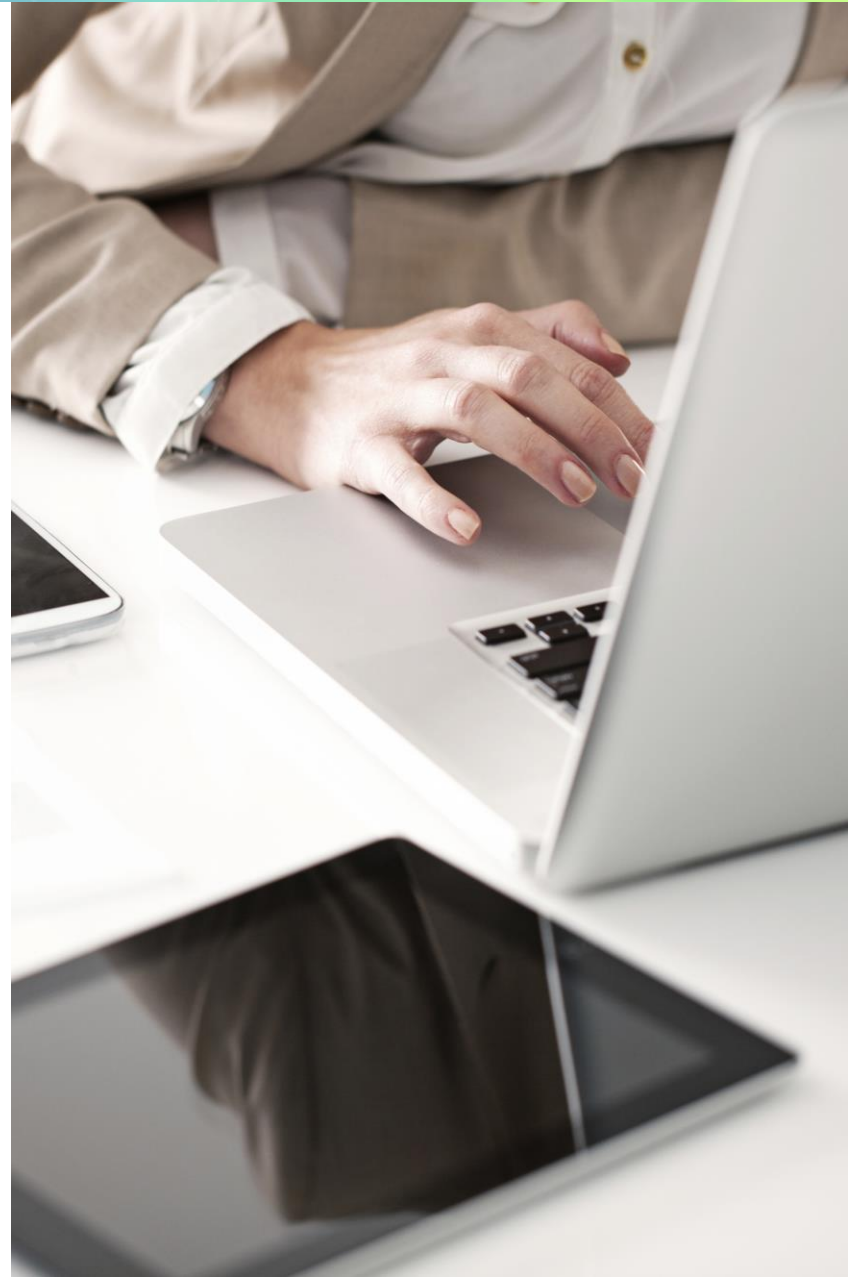
**National Planning, Facilitation,
Monitoring & Support**

US EPA
(Navitas Supporting)

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**Local/Regional
Planning & Execution**

Pilot Sponsors
(Implementation Contractors Supporting)



Critical Success Factors

- Scale
- Common products
- Consistent program design and approach (i.e. midstream incentives)
- Streamlined data and reporting requirements
- Uniform templates with allowances for local/regional personalization
- Supportive regulatory policy and EM&V approaches





Join the ENERGY STAR Retail Products Pilot to Influence Next Generation Retail Programs

- 2015 pilot
- 2016 national program launch

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