Taking the “Hard” out of Hard to Reach

November 7th, 2016

Bonneville
POWER ADMINISTRATION

the

CONVENTIONAL

wisdom

how do we
EXPAND
OUR REACH?

Building by Building

VS.

Market Level

Different measures or market segments need DIFFERENT APPROACHES

How do we best SATURATE *the* MARKET *and create* EQUITY?

Price
Dynamics

AND

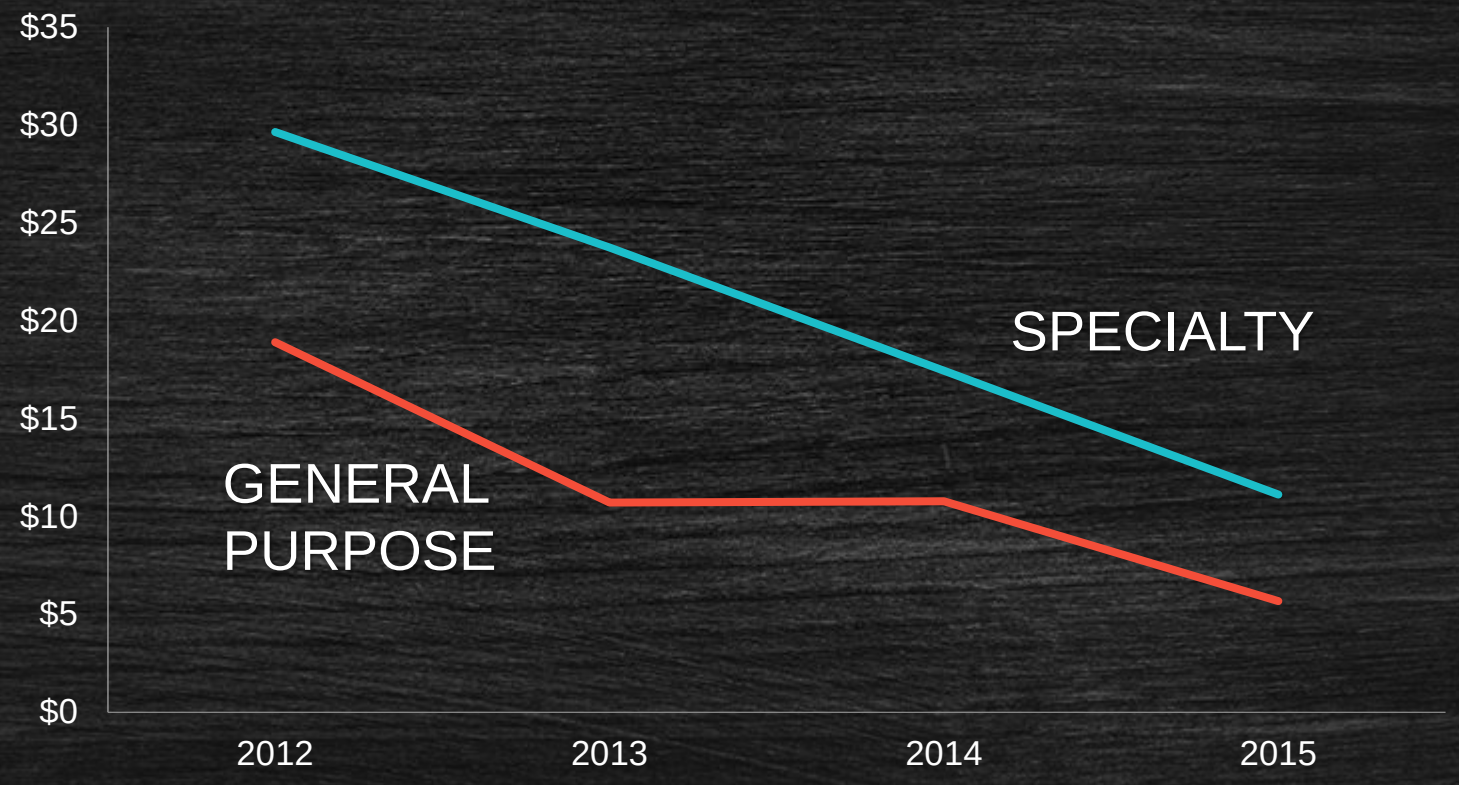
Regulation
Dynamics

PRINCIPLE NO. 01

PRICE DYNAMICS

LED PRICES

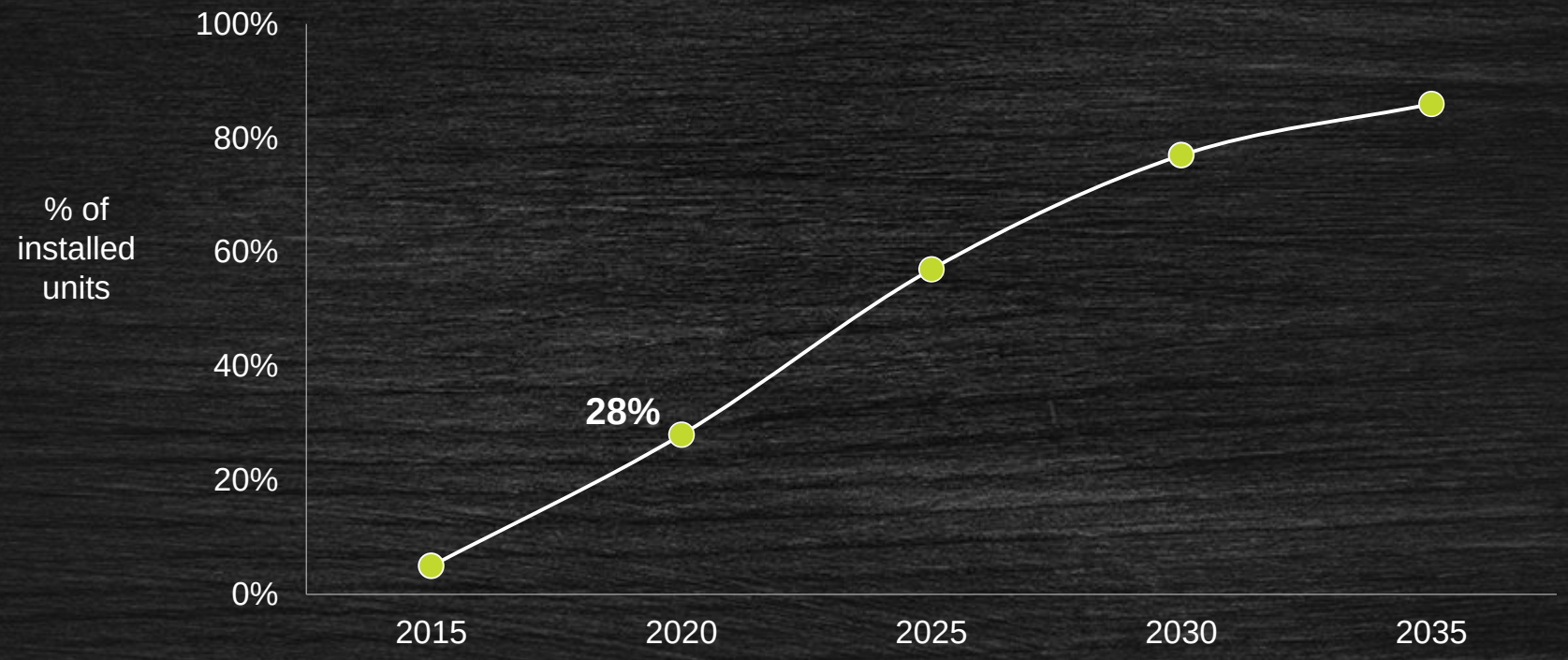
2012-2015



Source: NEEA shelf survey data

FUTURE LED STOCK SATURATION

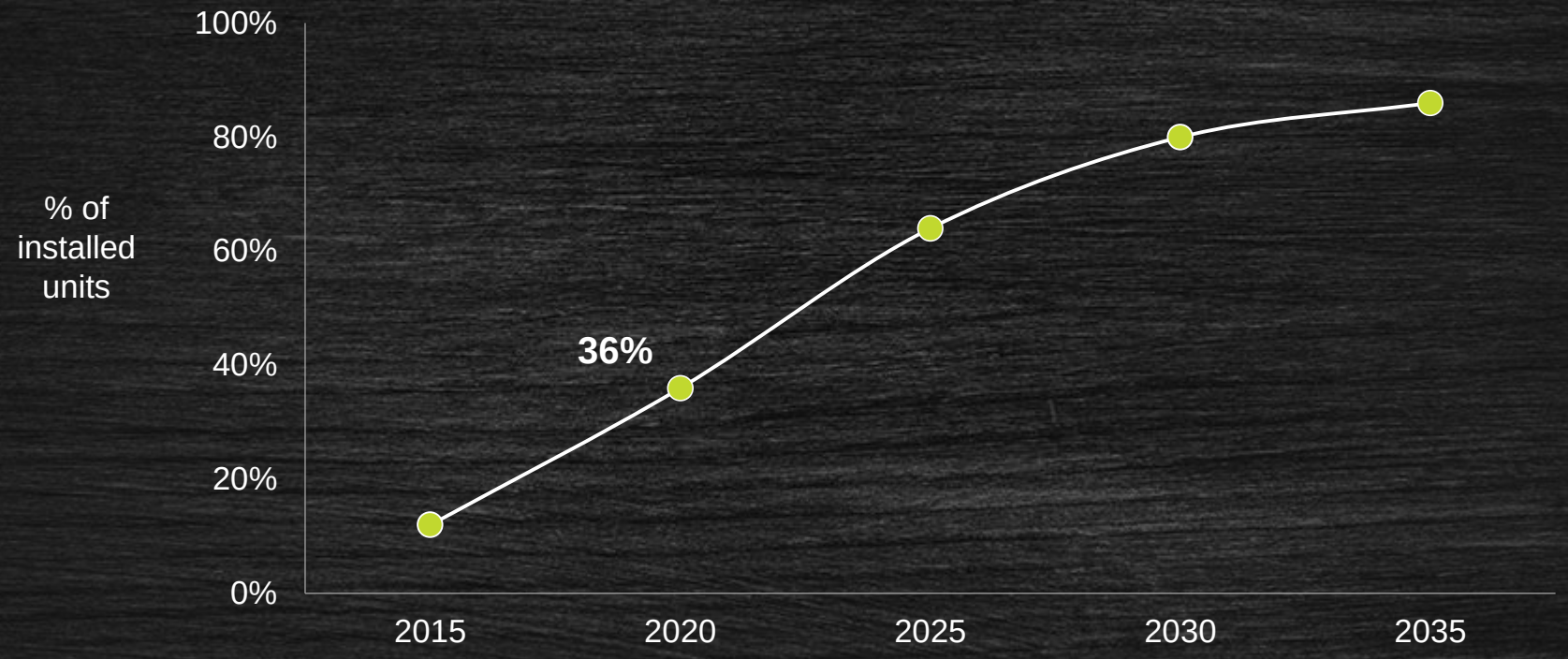
residential



Source: U.S. DOE 2016

FUTURE LED STOCK SATURATION

commercial

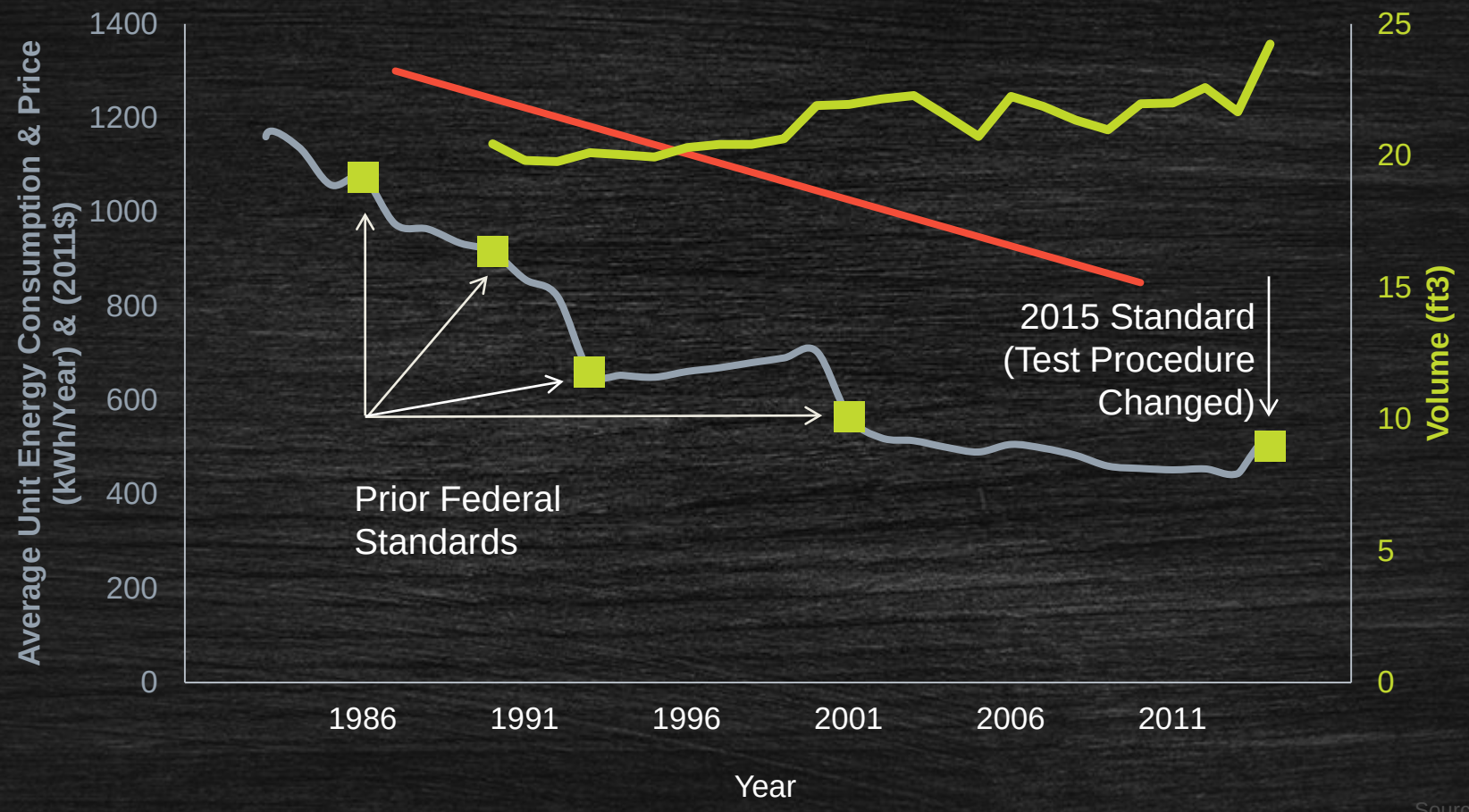


Source: U.S. DOE 2014

PRINCIPLE NO. 02

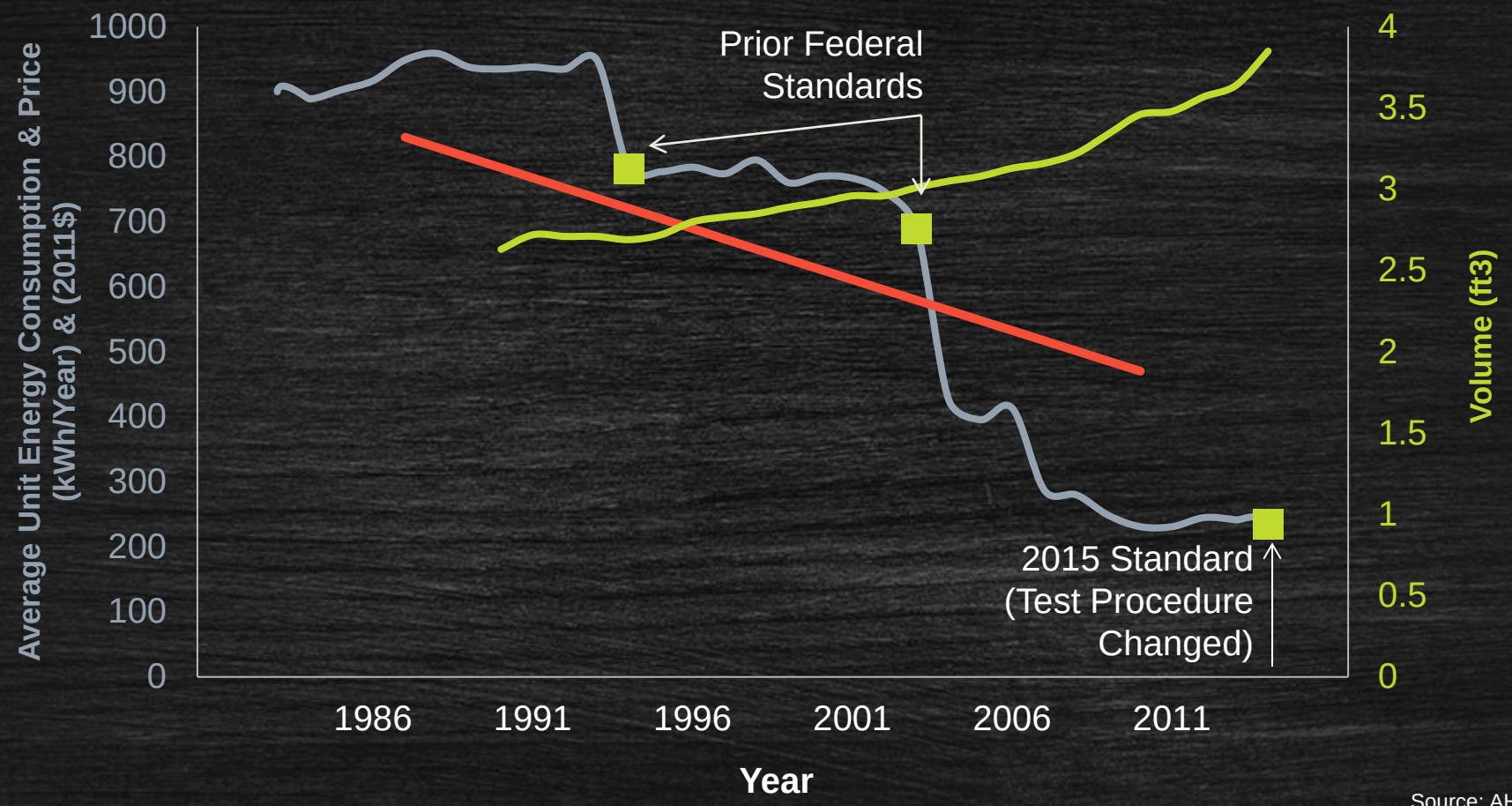
REGULATION DYNAMICS

RESIDENTIAL REFRIGERATORS STANDARDS IMPACT OVER TIME



Source: AHAM

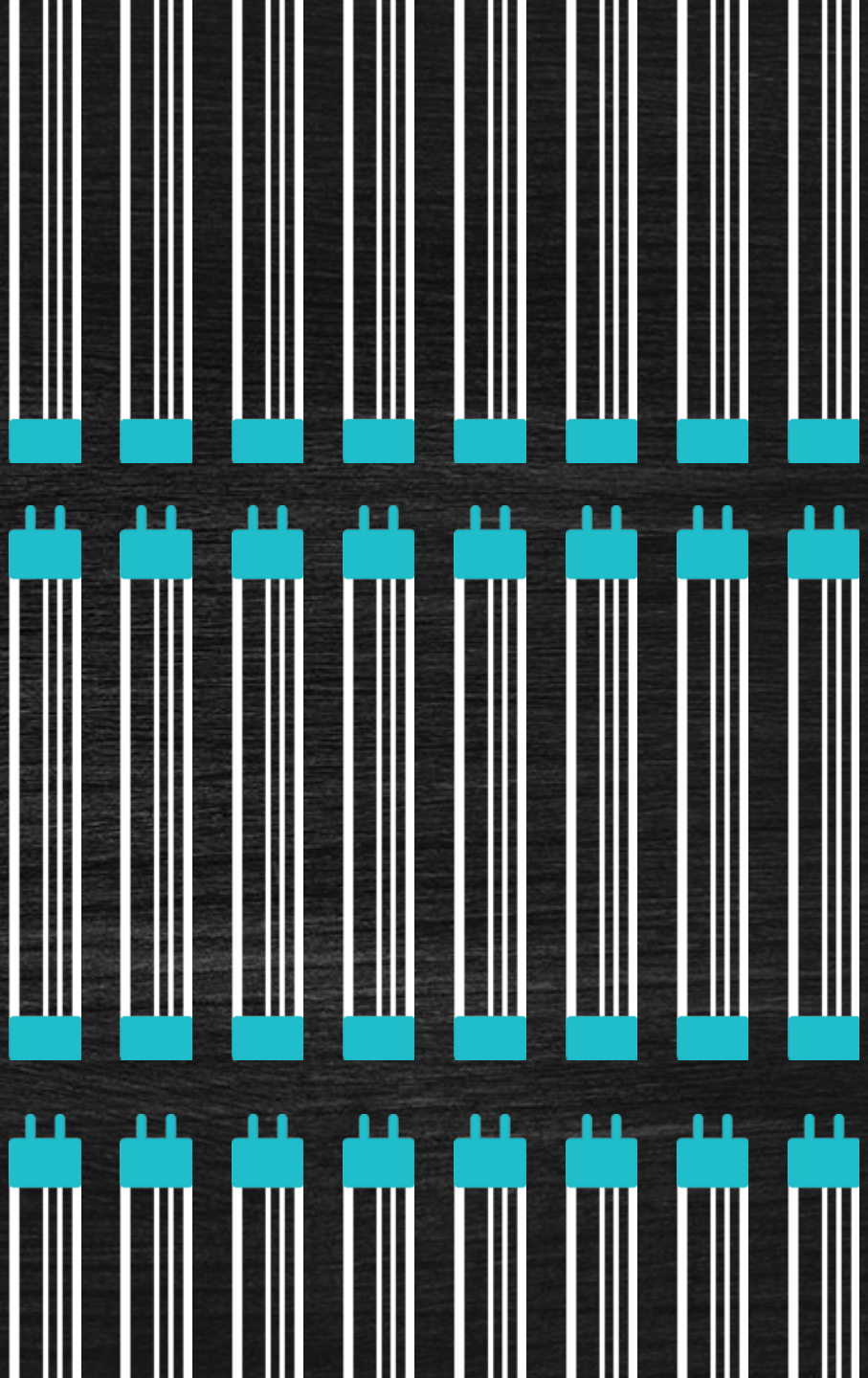
RESIDENTIAL CLOTHES WASHERS STANDARDS IMPACT OVER TIME



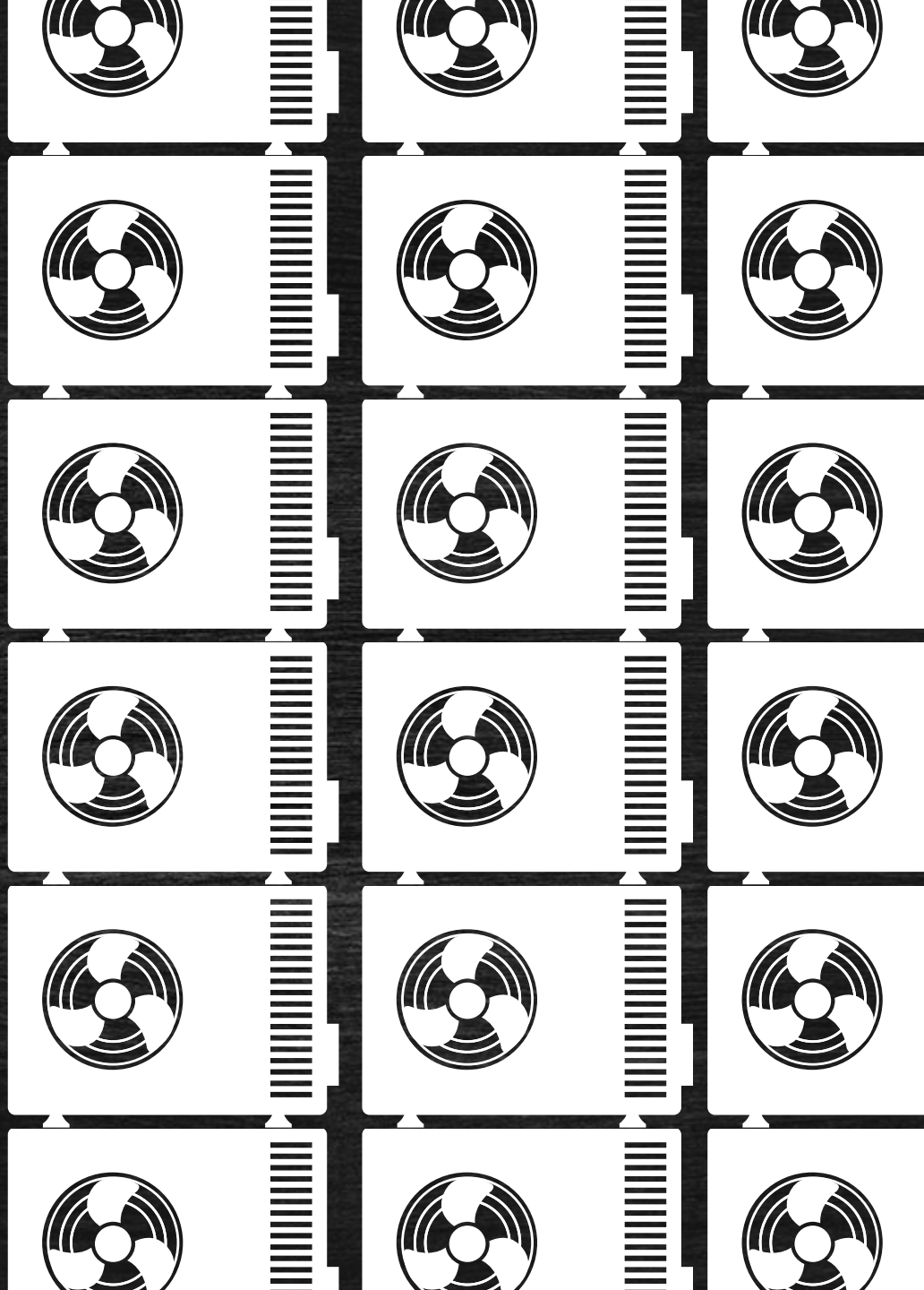
Source: AHAM

WHAT IF
we thought about this
DIFFERENTLY?

Lighting Maintenance Market



HVAC Supply Chain



TAKEAWAY NO. 01

Looking at entire markets tells us a lot about what is hard to reach.

TAKEAWAY NO. 02

Different measures or market segments may need different strategies to gain the most traction.

- *Building by building*
- *Market level*

TAKEAWAY NO. 03

Everyone gains access to efficiency when you drive prices down at the market level.

TAKEAWAY NO. 04

Broad-stroke strategies like regulation create efficiency across the entire market, ensuring everyone benefits.

Bonnie Watson

bfwatson@bpa.gov

503-230-3693