



E Source

Customer Wants and Needs Panel

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NARUC Electricity Committee Meeting

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My Premise

- Electricity is not top of mind to most consumers and they know little about electricity and it's pricing
- Many times customers don't know what they want
- Listening to (and hearing) customers is essential
- Smart controls and automation are rapidly growing in the market, but energy management is not the prime driver

**We need more investment in
education & awareness!**



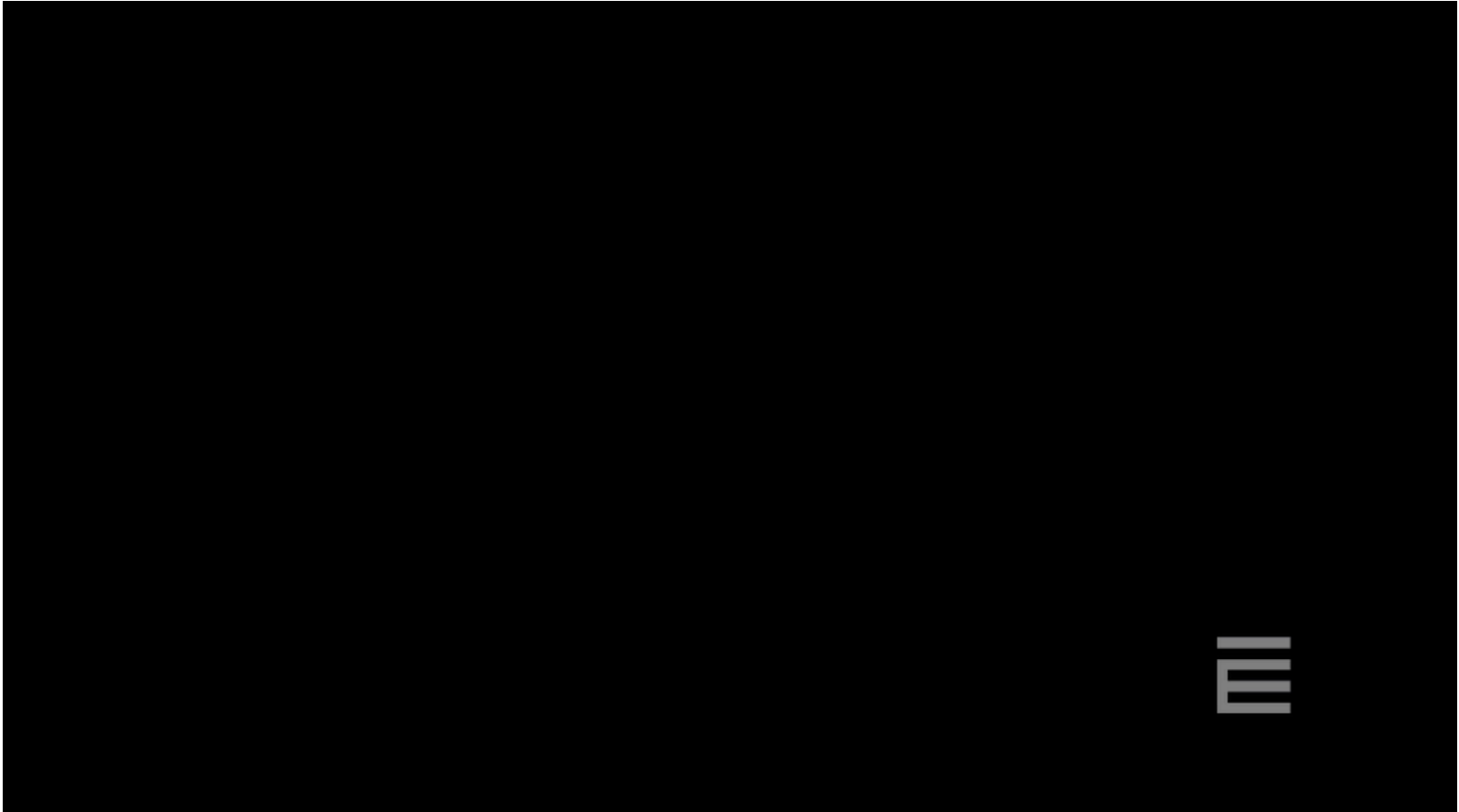
What Customers [Don't] Know About Electricity



What's a kWh?



How Much Does a kWh Cost?



Who Do Customers Want to Deliver Their Energy Services?

- 84% Their electric utility
- 19% Third-party energy management company
- 16% Wireless phone company
- 15% Cable company
- 11% Landline phone company

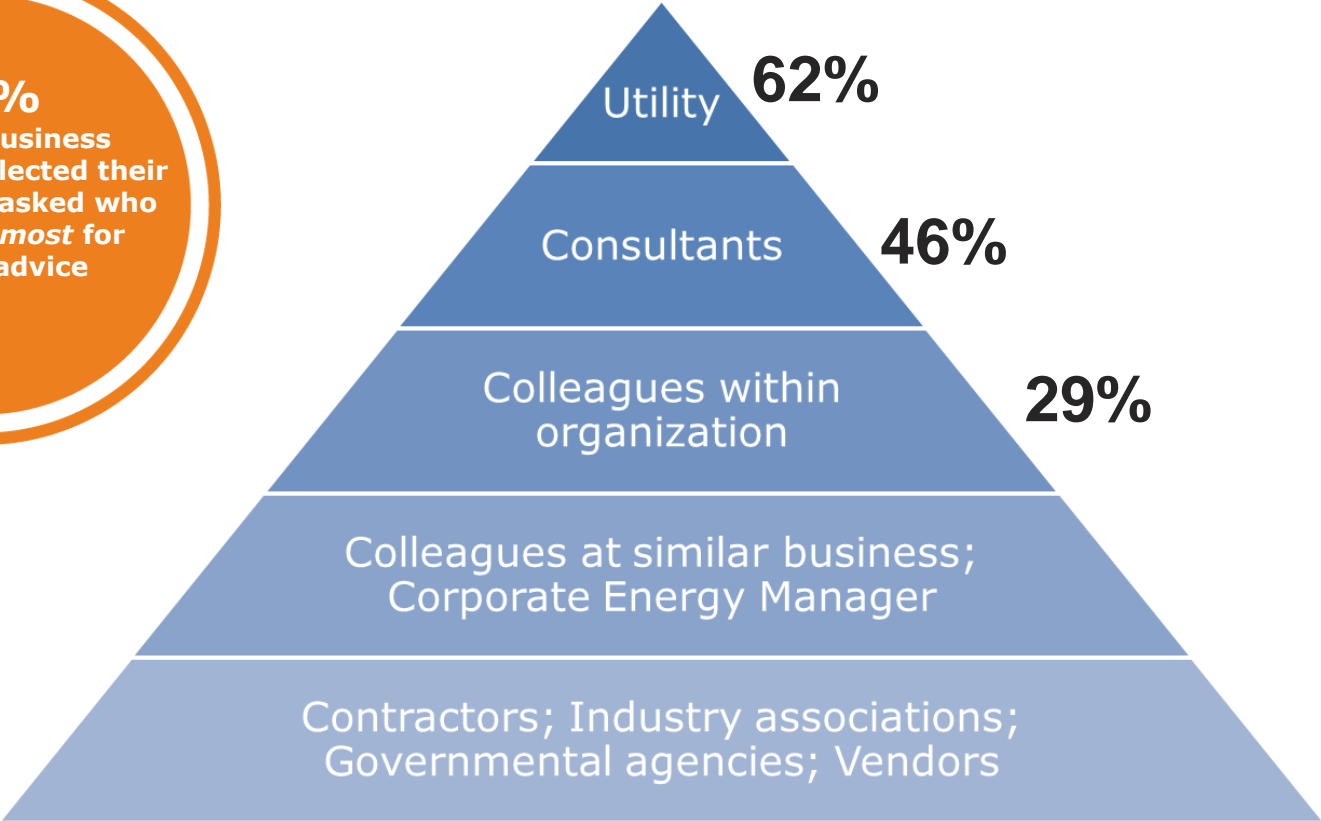
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Source: Pike Research. Smart Grid Customer Survey and included in Effective Customer Engagement: Utilities Must Speak Customers' Language. Published 1Q 2013. Commissioned by Opower



Who Do You Trust Most for Energy Advice?

62%
of large business customers selected their utility when asked who they trust *most* for energy advice



Source: E Source 2014 Large Business Customer Satisfaction Survey
N=1,700 large business key account customers.



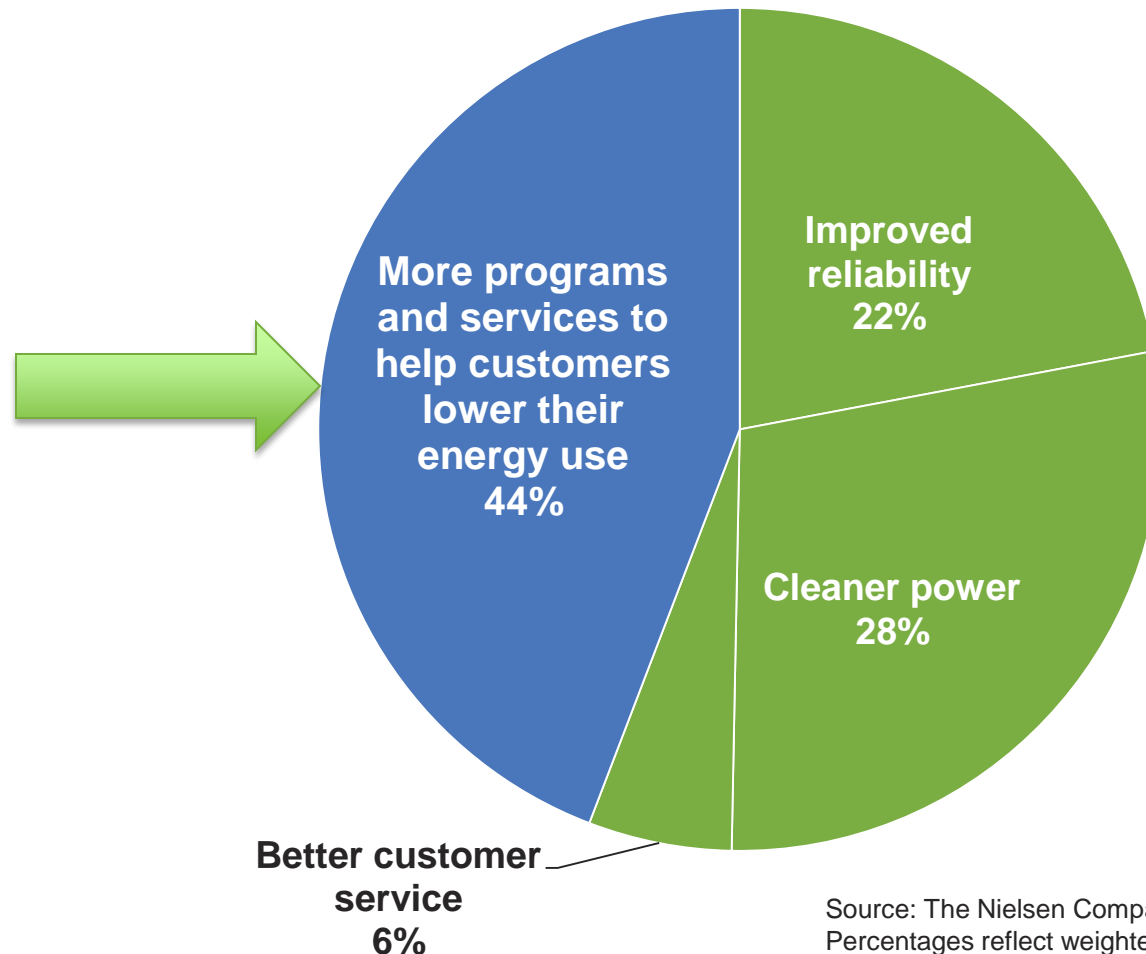
If your electric utility were given a grant to improve part of its business, what would you most like to see them invest in?

1. **Improved reliability** (reducing outages, quicker outage response)
2. **Cleaner power** (more pollution controls, more renewable energy)
3. **Better customer service** (better phone service, better website, better billing information)
4. **More programs and services** to help customers lower their energy use (appliance rebates, weatherization services, energy savings info)

Source: The Nielsen Company E Source 2013 Energy Survey



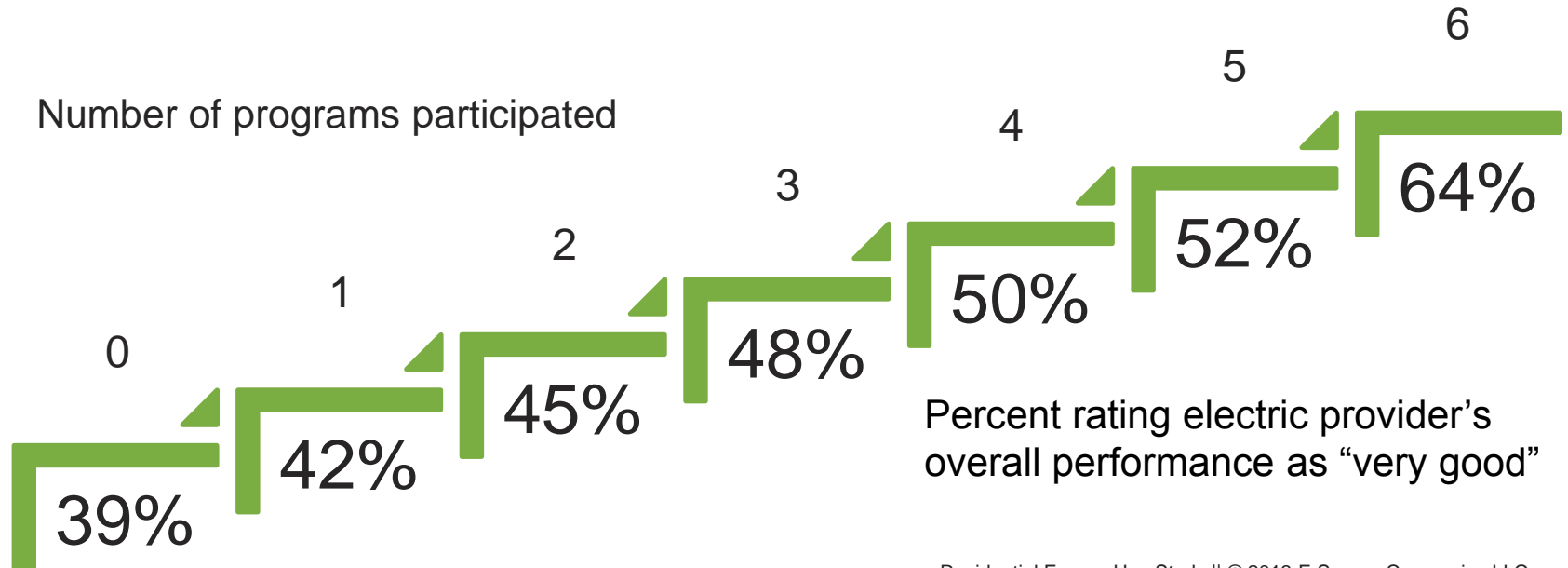
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Source: The Nielsen Company E Source 2013 Energy Survey
Percentages reflect weighted data
N=31,237 US consumers. Online panel



Customer Satisfaction Increases with Program Participation



Residential Energy-Use Study || © 2015 E Source Companies LLC

N= 30,119 for 0, 3893 for 1, 1293 for 2, 475 for 3, 175 for 4, 69 for 5, and 64 for 6



Smart Home Emerging Quickly

- 72% of homeowners said they want a smart thermostat*
- Smart plugs and smart LED bulbs seem poised to be the next major gadgets adopted by consumers
 - Smart appliances face an uncertain future
 - In-home energy-use displays are fading away in favor of web portals and apps for mobile devices
- Security, peace of mind, and convenience are key drivers more so than cost savings from energy management
- Most consumers look to a security company, technology company, home repair store, or cable service providers over utilities for these products



* iControl Networks 2015 State of the Smart Home Report www.stateofthesmarthome.com



Customers Like Smart Controls



For More Information



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