

What Do Customers Want?

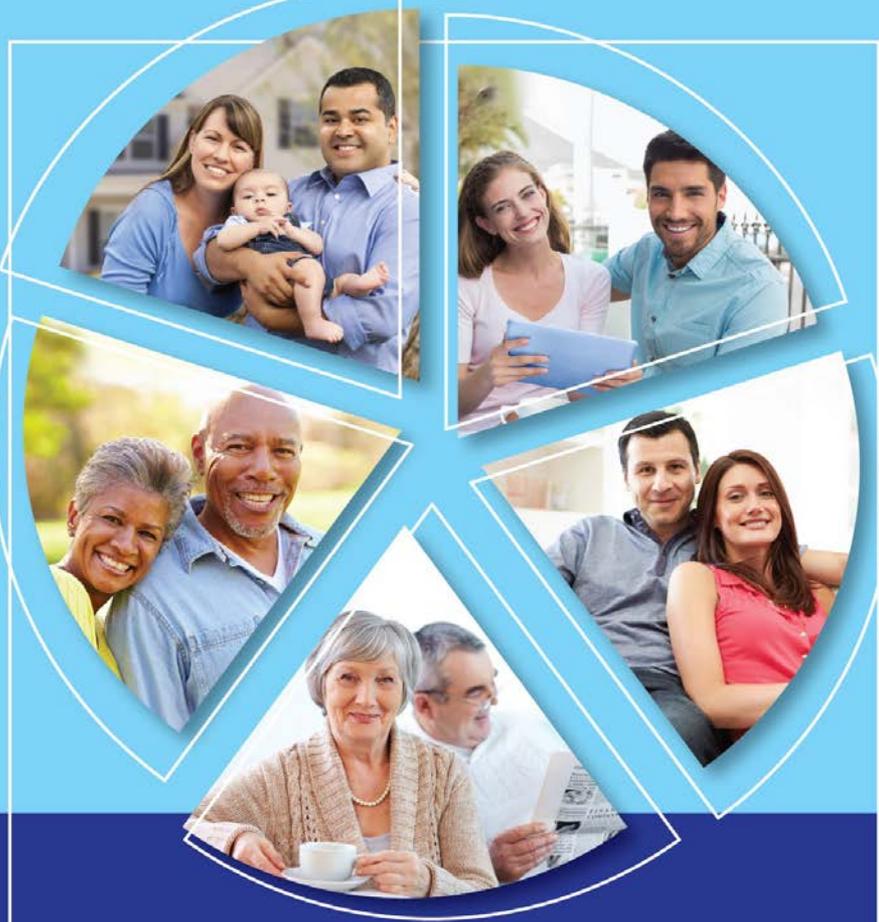
Who's Driving the Future?

UF Public Utility Research Center

February 22nd, 2017

Snapshot: Who We Are

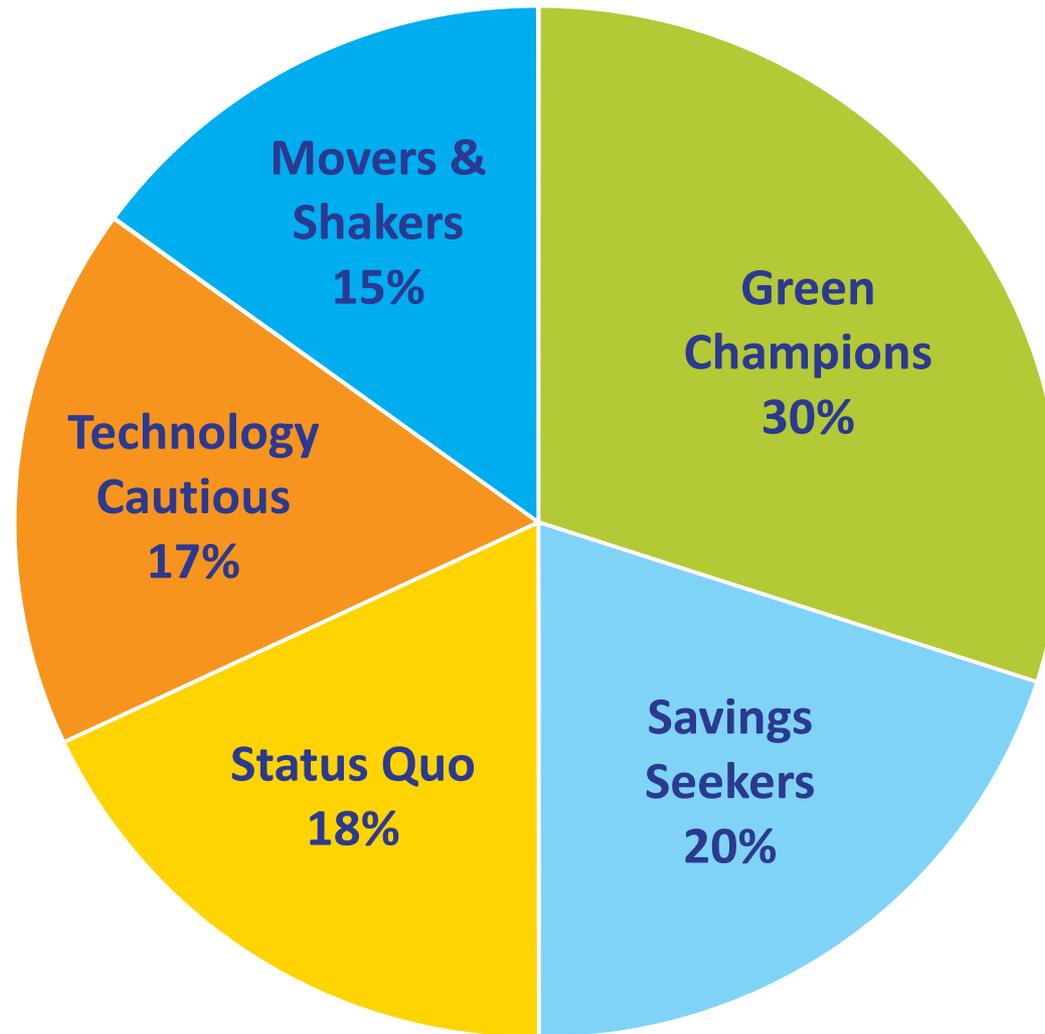
- ▶ *501(c)(3) nonprofit formed in March 2010*
- ▶ *Driven by the mission to advance a consumer-friendly, consumer-safe smart grid*
- ▶ *Membership organization comprised of 120+ utilities, technology vendors and nonprofit affiliates*
- ▶ *We work by listening, educating, and collaborating*



Consumer Pulse and
Market Segmentation
Study – *Wave 5*



The U.S. Population by Segment





Green Champions

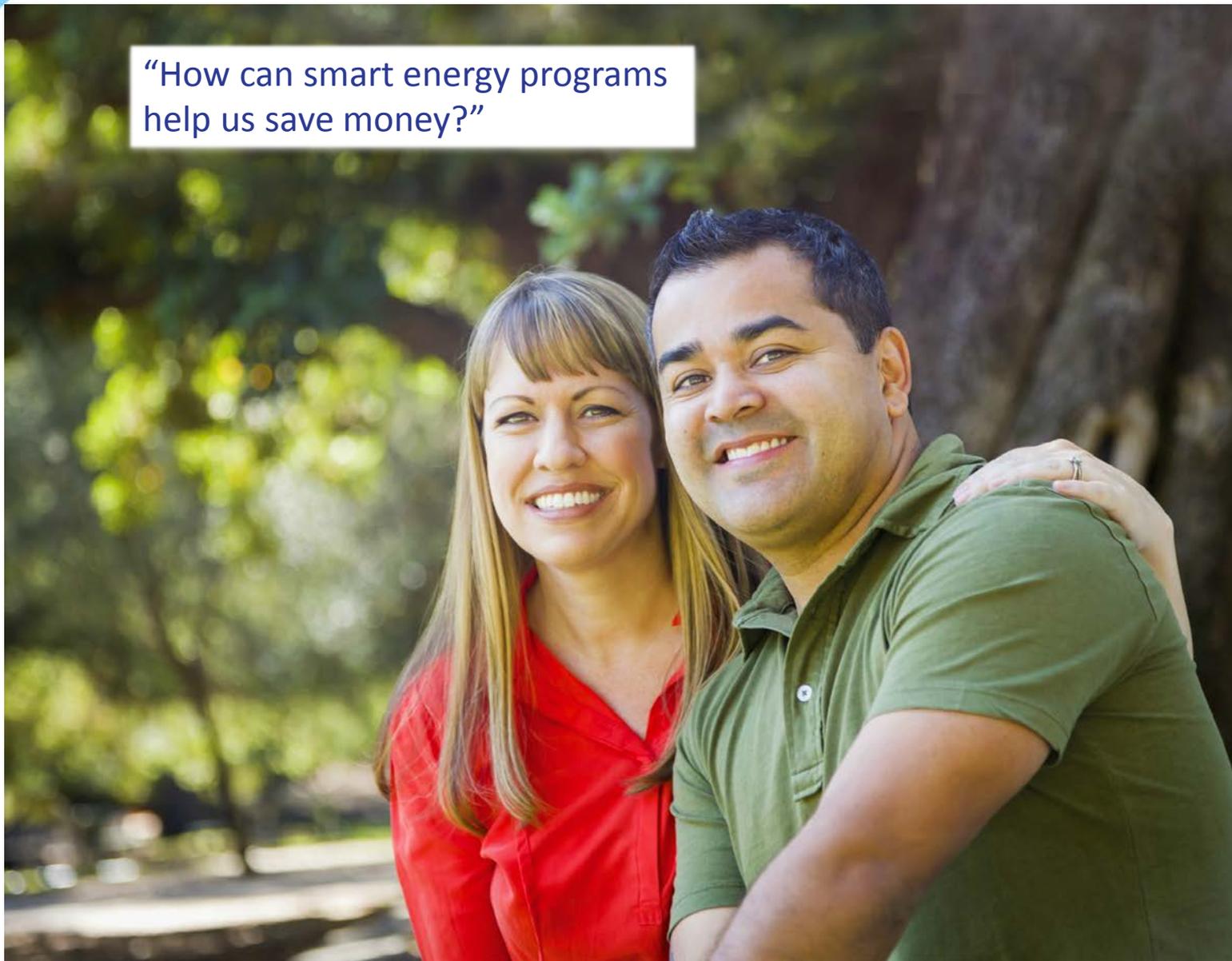
“Smart energy technologies fit our environmentally aware, high-tech lifestyles.”





Saving Seekers

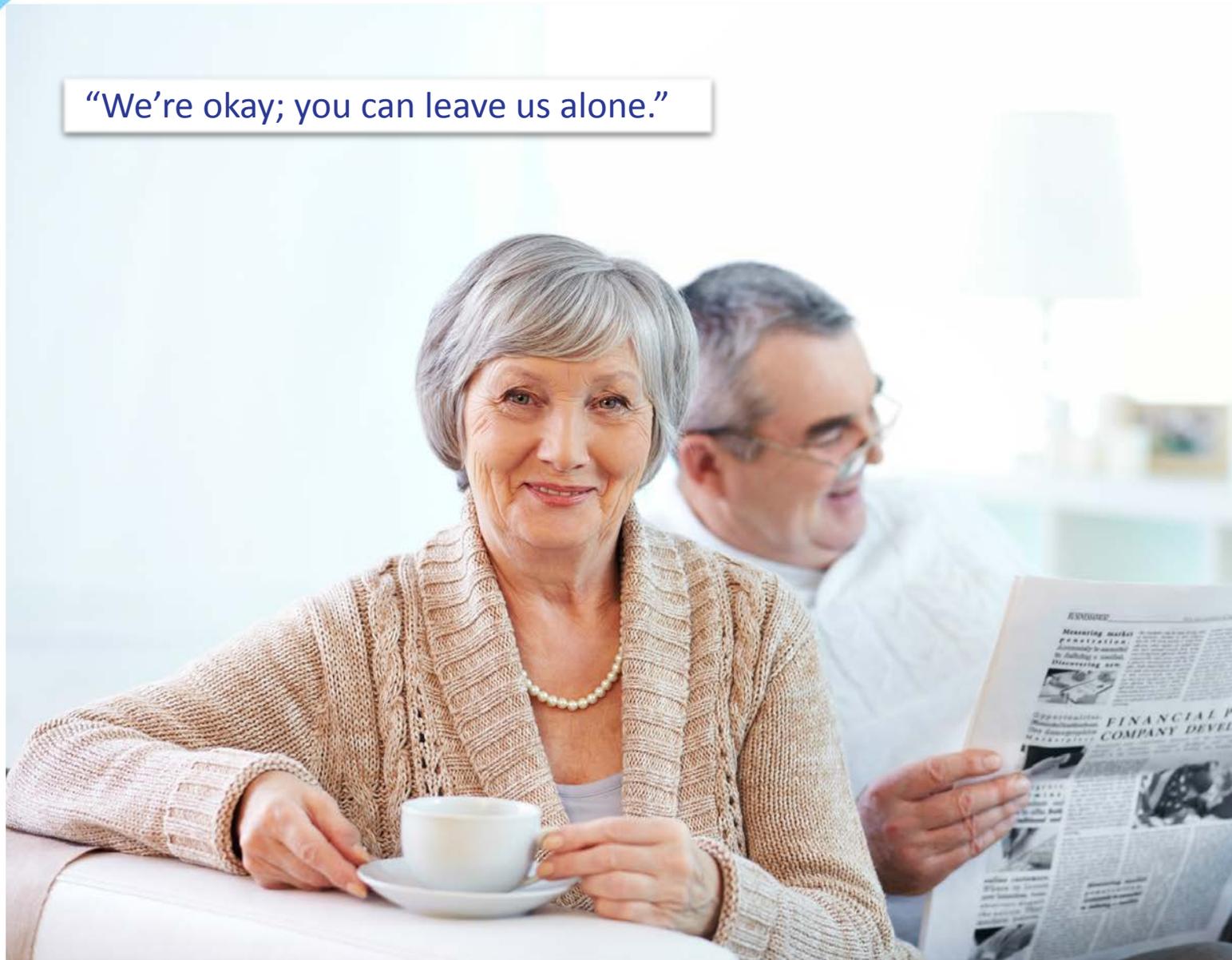
“How can smart energy programs help us save money?”





Status Quo

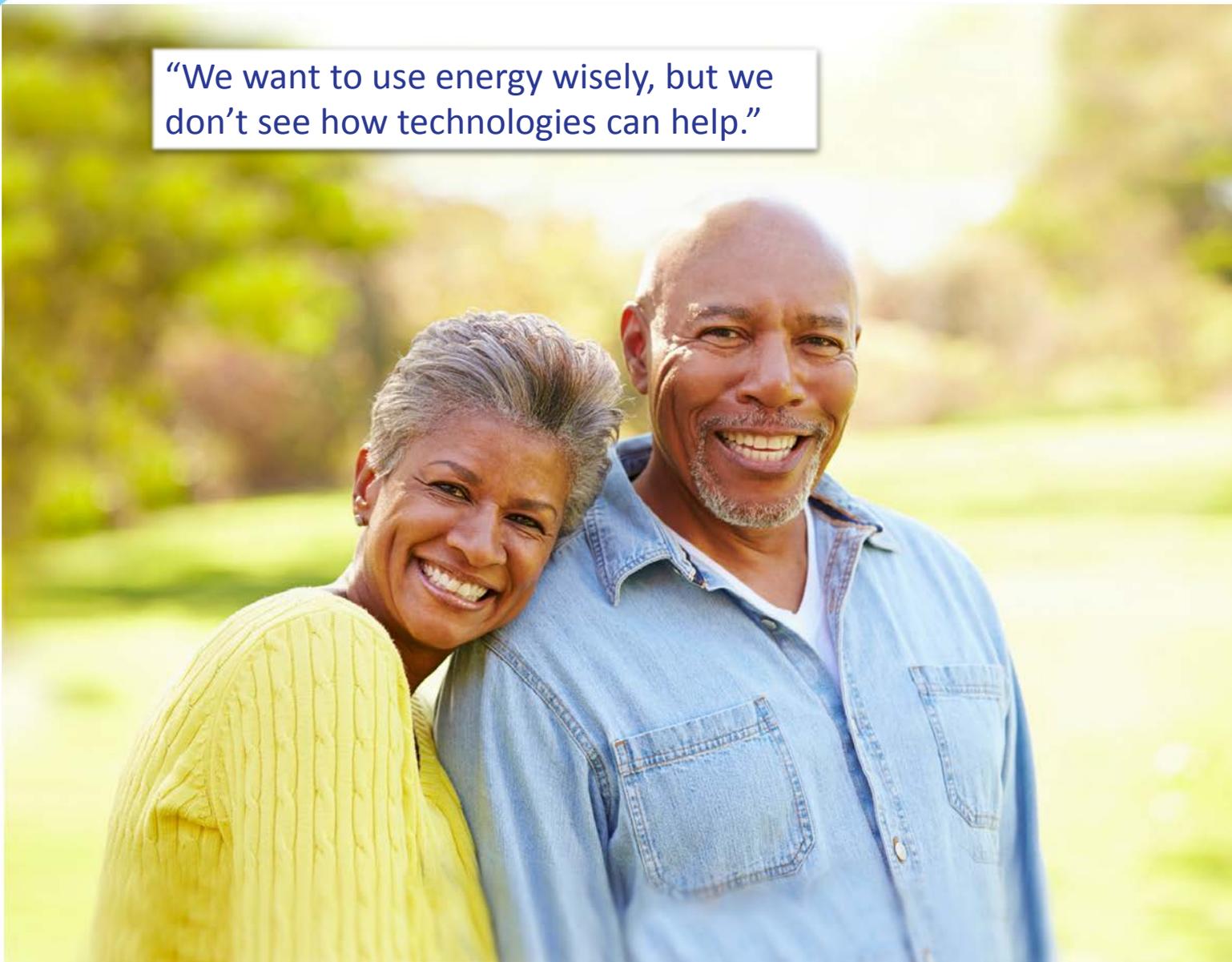
“We’re okay; you can leave us alone.”





Technology Cautious

“We want to use energy wisely, but we don’t see how technologies can help.”





Movers and Shakers

“Impress us with smart energy technology and maybe we will start to like the utility more.”





Smart Grid Consumer Segments

Green Champions



“Smart energy technologies fit our environmentally aware, high-tech lifestyles.”

Saving Seekers



“How can smart energy programs help us save money?”

Status Quo



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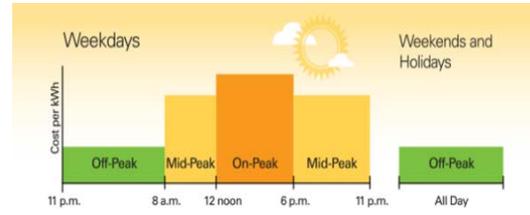
Movers and Shakers



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9 Technology Enabled Programs Tested

Energy Tracking & Alerts



Time-varying Rate Plan



Onsite Power Storage

Smart Appliances



Prepaid Billing



Rooftop Solar & Net Metering

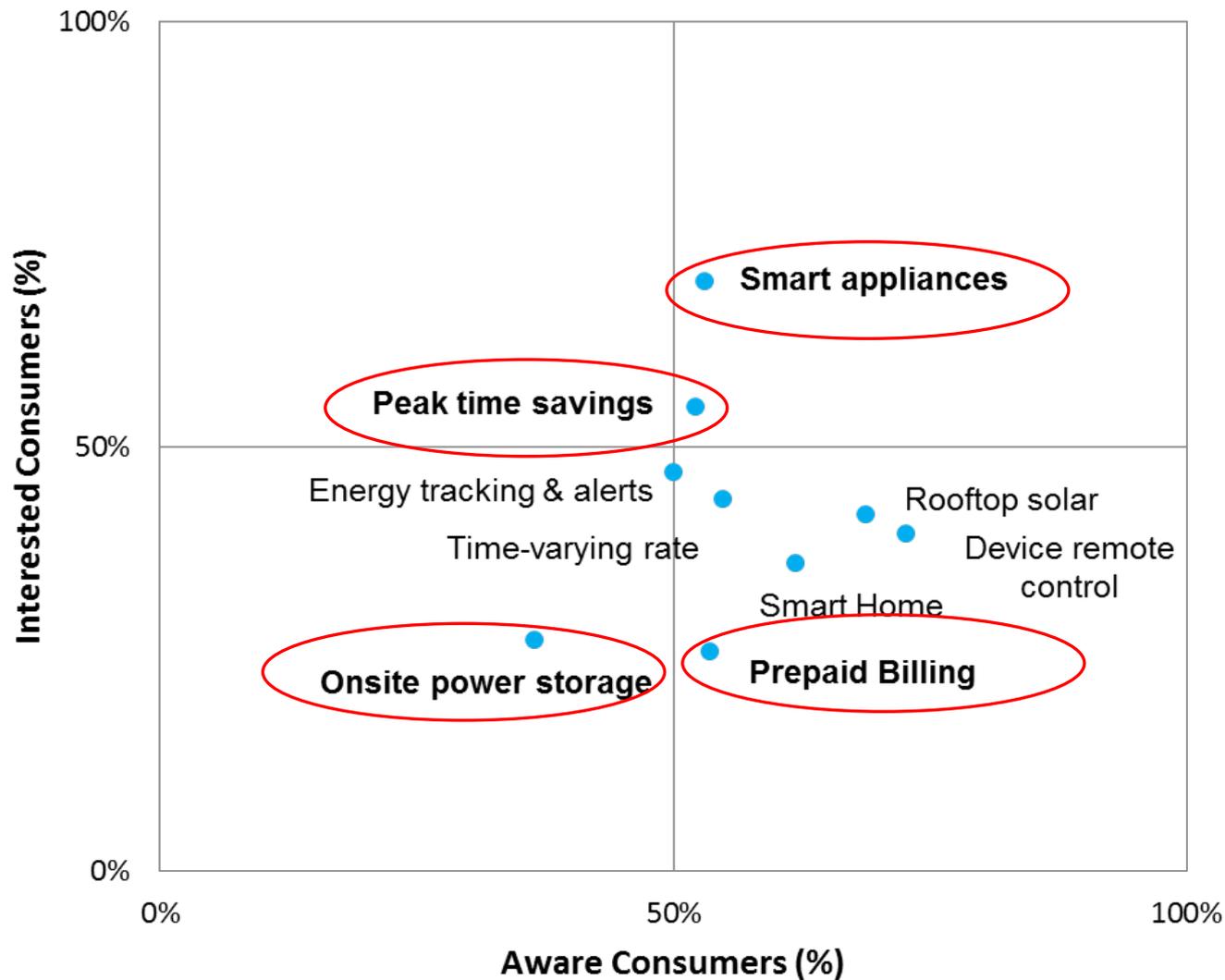
Peak Time Savings Plan



Device Remote Control

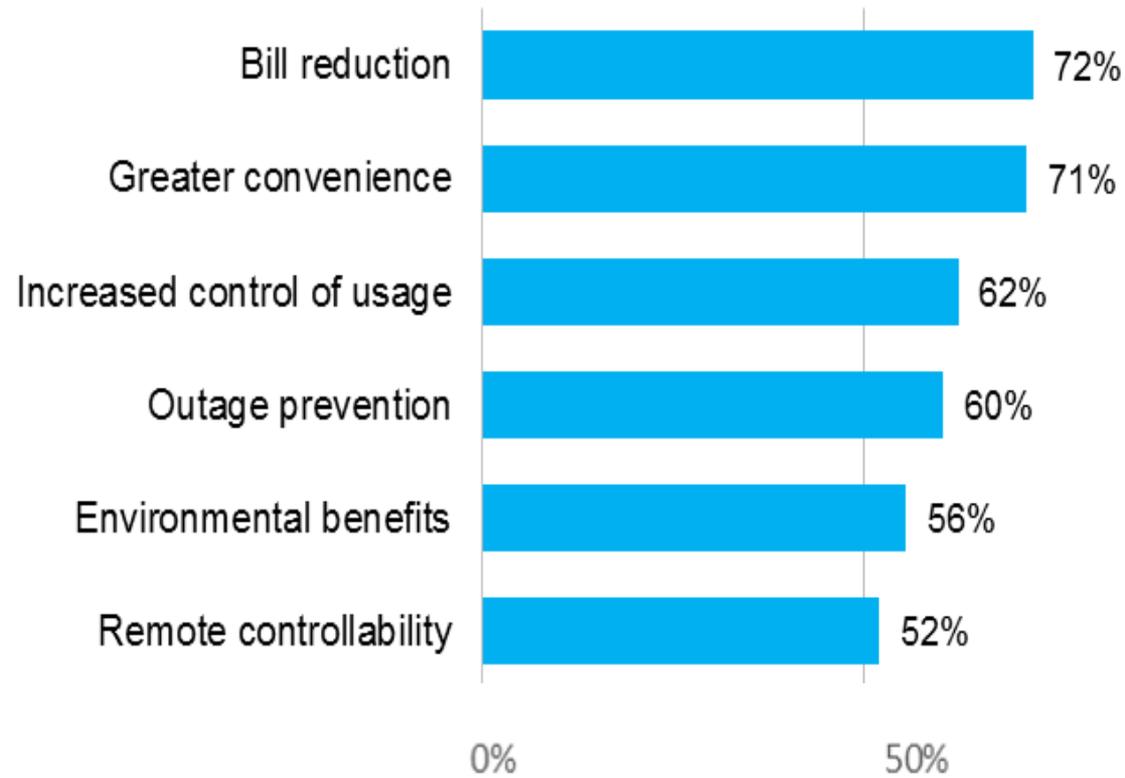


Consumer Interest vs. Awareness



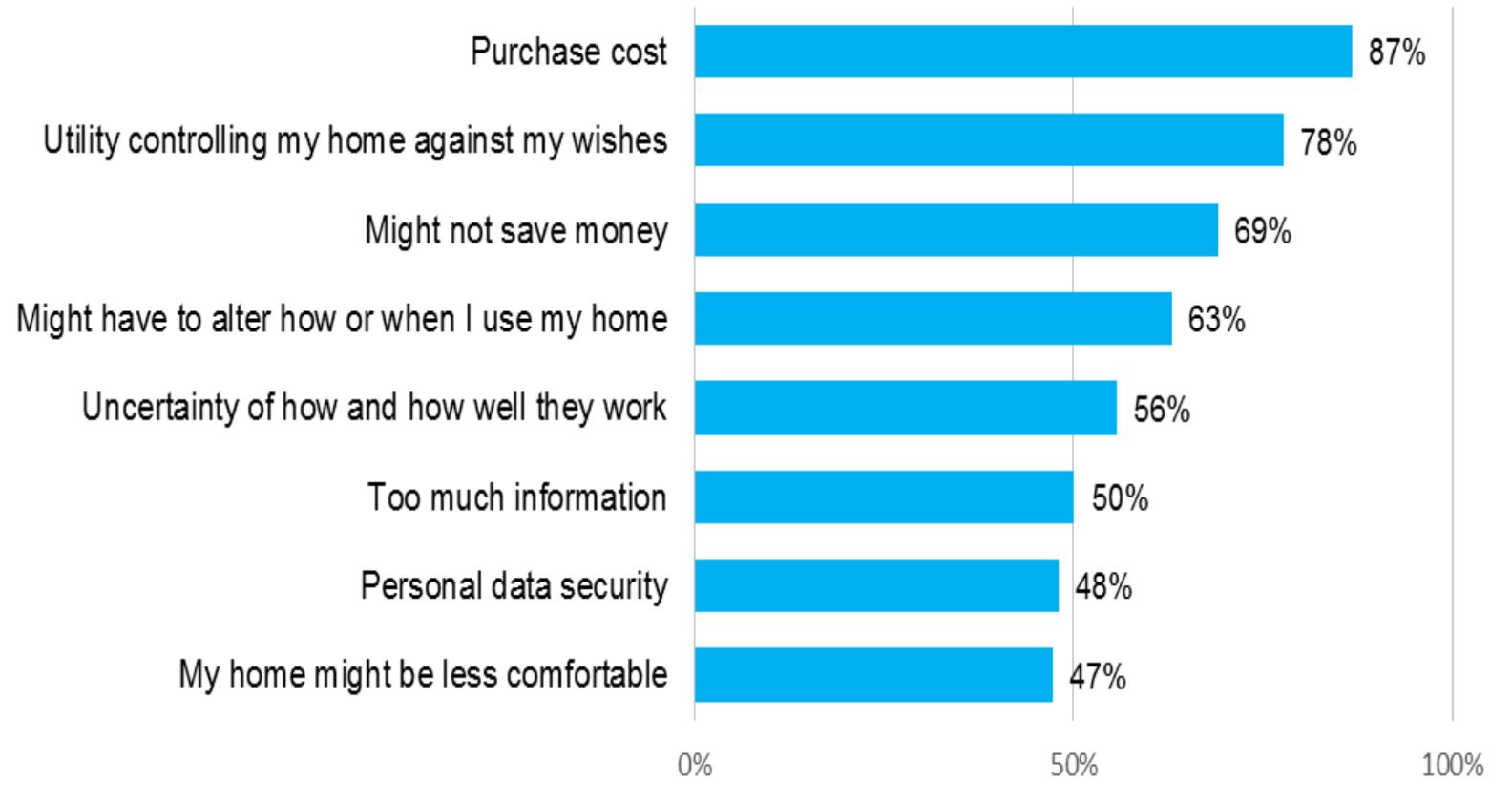


What Motivates?





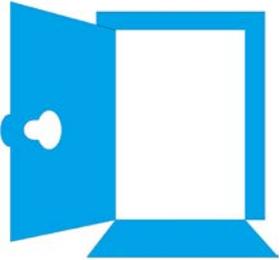
Customer Concerns



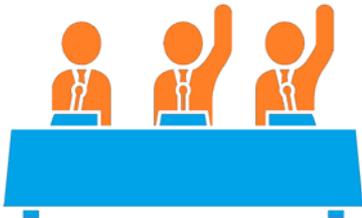
Where to Start?



Consumers are interested in TOU programs if they can save money but they want control



Almost 70% of consumers have an interest in signing up for a smart thermostat program



More than 50% of consumers find a smart thermostat program with DR appealing



The Path Forward

Smart thermostat programs as a low-cost gateway to smart grid enabled products & services

Reduced upfront costs with an emphasis on consumer control



Educational and pilot-programs will increase awareness and understanding

Segmented messaging and “early adopter” incentives



Questions

