

## E SOURCE Large Commercial and Industrial Multi-Client Study Estimating Markets for Energy Information Services

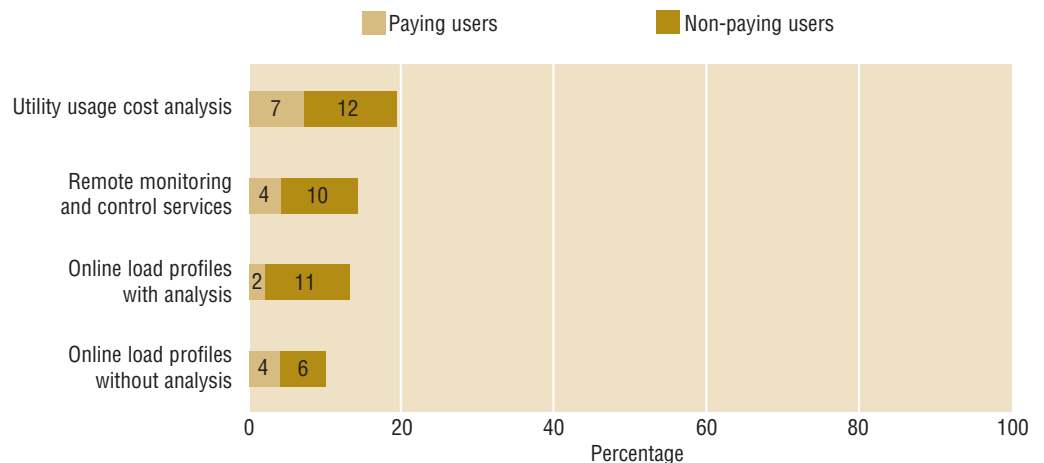
This E SOURCE **Multi-Client Market Research Study** provides information for energy service providers (ESPs) interested in evaluating customer perceptions of energy information services (EIS). Surveying decision-makers at commercial, industrial, and government institutions throughout the U.S. and Canada, we tested four EIS in detail: utility usage cost analysis, online load profiles without analysis, online load profiles with analysis, and remote monitoring and control services. Our results will give energy providers the information they need to accurately assess the current market and gauge interest among non-users.

### Current Outlook on Energy Information Services

The market for energy information services has grown since E SOURCE first investigated it two years ago. New data from our 2002 study indicate that around 60 percent of end users at large commercial, industrial, and institutional organizations have at least a passing knowledge of each of the services tested. Although aided awareness of these services is fairly high, their penetration into the market remains fairly low, ranging from 10 to 19 percent. These rates include users who pay for the services and those who receive them for free. Many ESPs continue to offer these services for free, which increases awareness, but that practice may decrease their perceived value.

### Paying and non-paying users of four key EIS products

Nineteen percent of our survey respondents say they use utility usage cost analysis, which tops the list of the services we tested.



SOURCE: E SOURCE



For this E SOURCE study, we sorted customers into groups on the basis of several key variables, including Standard Industrial Classification (SIC) code, size of business, and current use of energy information services. We estimated market potential, evaluated the importance of product features, and identified preferred providers. The results will allow ESPs to better understand what these customers want and how they would like such services delivered to them.

### **What Do Customers Really Want?**

Users of three of the four EIS tested perceive that those services provide high value to their companies. But among users of online load profiles without analysis, only 13 percent say the service is “very useful” to their company (a rating of 9 or 10 on a 10-point scale). Perceived usefulness is highest among users of utility usage cost analysis, followed by remote monitoring and control services, and online load profiles with analysis.

Across the board, non-users had lower perceptions of how useful the tested EIS would be to their organization as compared with users. We identify the non-price features that are most important to non-users and recommend ways to more effectively communicate the value of each EIS.

### **Methodology and Deliverables**

For this E SOURCE study, we surveyed around 800 energy decision-makers at commercial, industrial, and government institutions throughout the U.S. and Canada in the fall of 2002. Within the commercial market, we interviewed organizations in the healthcare, education, retail, office buildings, hotels, grocery, and restaurants sectors. Within the industrial market, we interviewed organizations that produce finished products and those that manufacture equipment or inputs into other industrial processes.

The final study report—complete with graphics, key findings, and actionable recommendations—will be delivered to study subscribers along with a data notebook containing a PowerPoint presentation of topline results and a CD with complete datasets in Excel, ASCII, and SPSS formats.

### **Related E SOURCE Studies**

This study is one of three market research reports on the large commercial, industrial, and institutional marketplace that are now available from E SOURCE. The other two studies are “Estimating Markets for Distributed Energy Resources and Power Reliability Services” and “Estimating Markets for Energy-Efficiency and Load Management Services.”

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