

# Strategic Electrification and the Next Generation of Efficiency Programs

Insights from Residential Customer Market Research, Utility Benchmarking, and YOU

**Courtney Welch**

Associate Director, E Source



**E Source**

E Source Forum 2018

# Strategic electrification polling

1. Get out your phone or laptop!
2. Go to [www.PollEv.com/esourcepolls418](http://www.PollEv.com/esourcepolls418)
3. Please enter your utility to appear alongside your responses

# E Source Distributed Energy Resource Strategy Service

- Building electrification
- Electric vehicles and chargers
- Rooftop solar
- Community solar
- Green pricing programs and green tariffs
- Behind-the-meter battery storage
- Microgrids





# Utility portfolio trends

# Annual Utility DER Strategy Benchmark

## 2018 Utility DER Strategy Benchmark

Alanya Schofield, Rachel Cooper, Laura Ruff

AUGUST 6, 2018



The Utility DER Strategy Benchmark is a voice-of-the-utility study intended to help our utility members better understand how US and Canadian utilities are approaching distributed energy resources (DERs). The results provide data-backed and qualitative insights into DER-related trends and will help you identify changes your utility might want to make to its DER-related efforts.

Topics covered in the 2018 study:

- Definition of DERs
- Anticipated types and magnitude of impacts
- Drivers and barriers
- Role and business model implications
- Pilots and programs
- Education and communication efforts
- Rate changes
- Organizational structures and budgets

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# DSM-DER portfolio goals are evolving



Energy savings



Cost-effectiveness



Demand reduction/  
load management



Customer benefits



Greenhouse gas (GHG)  
reduction



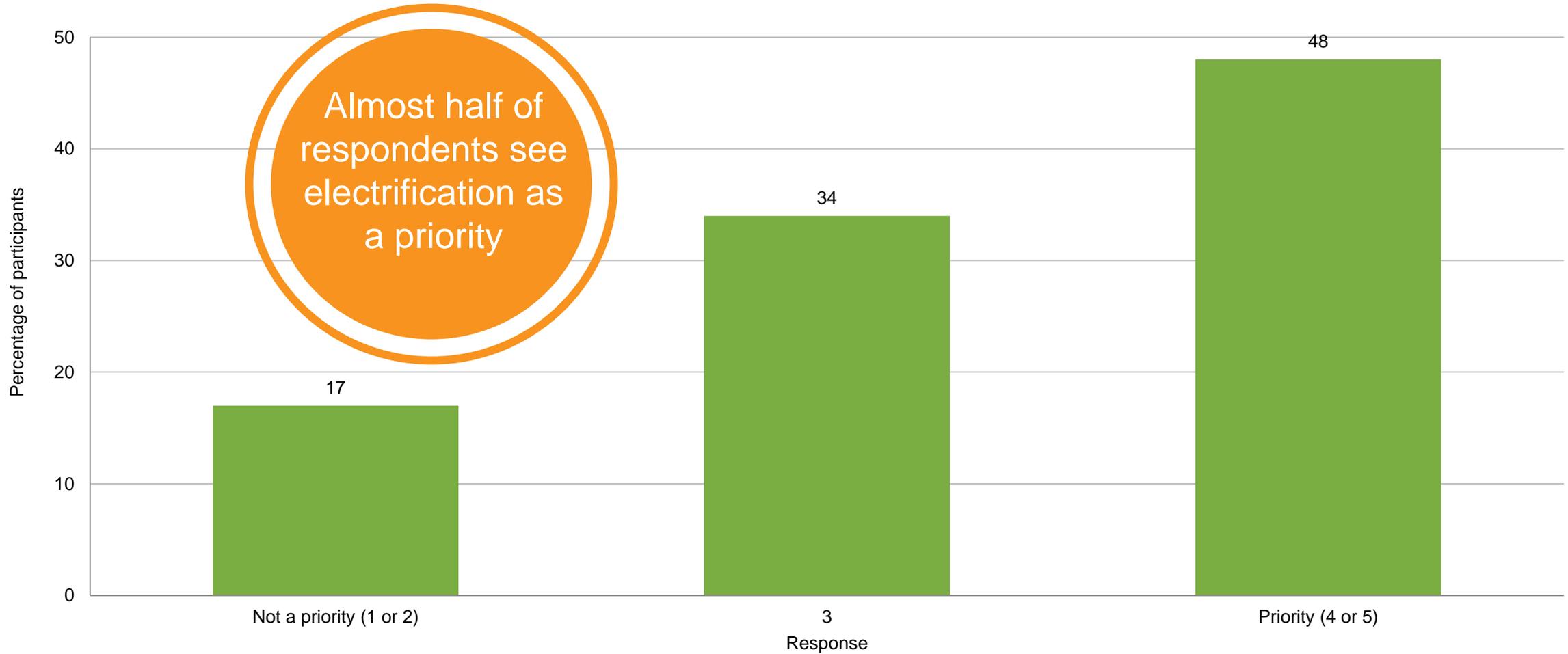
System operational  
benefits



Locational benefits

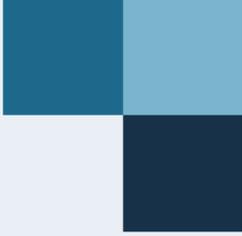
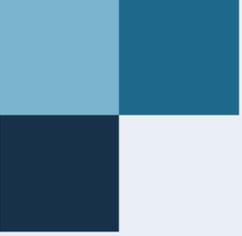
**Note:** DSM = demand-side management.

# Electrification is a priority



Base: n = 35 utilities. **Question S4\_14:** How much of a priority do you anticipate electrification (of transportation, natural gas appliances, etc.) will be for your utility in the next 7 years?

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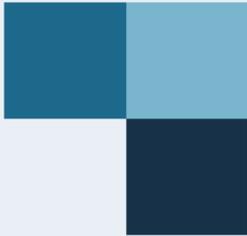
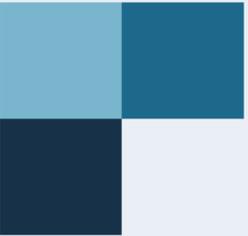


# Utilities are including less-traditional technologies and applications in the definition of DERs

Technologies included in utility definition of DERs	2018 (n = 36) (%)
Electrification	44
Grid-interactive water heaters	42
Thermal storage	36
Customer use of third-party power purchase agreements	33
Community-choice aggregation	22

**Base:** n = 36. **Question S2\_1:** How does your utility define DERs for the purpose of DER strategy work? In other words, what is included in or a consideration in your utility's current and planned DER strategy work? Select all that apply.

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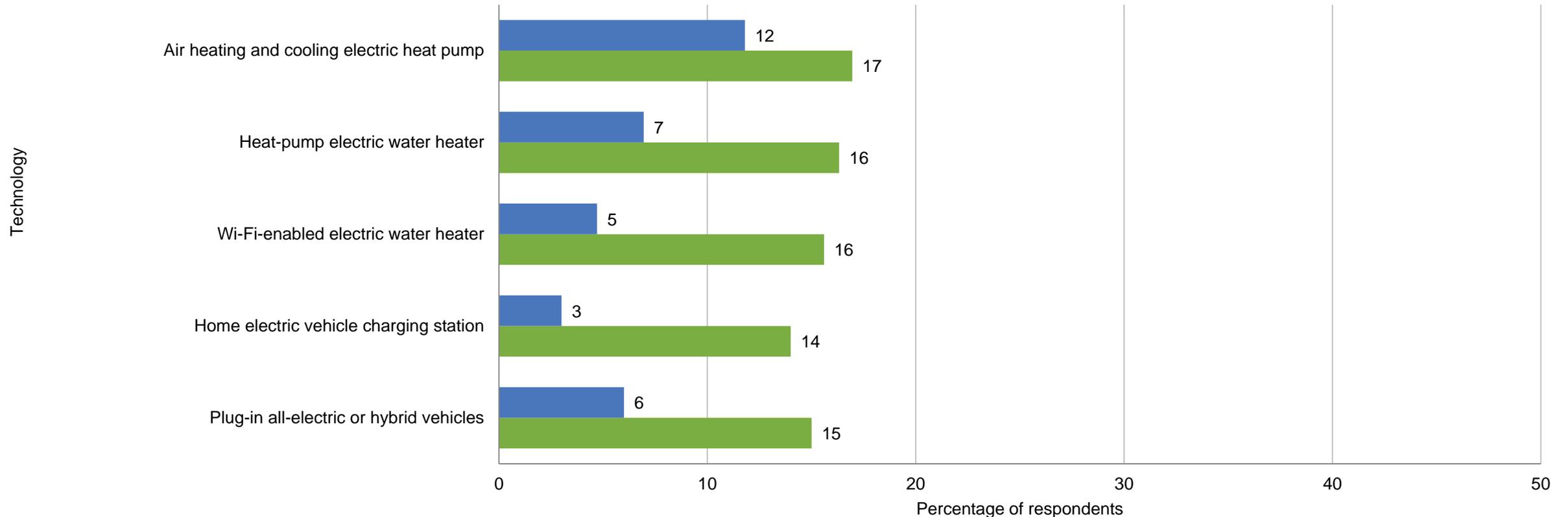
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An aerial view of a city with a network overlay of white lines and nodes. The text is centered in a white box.

# DER residential customer market research

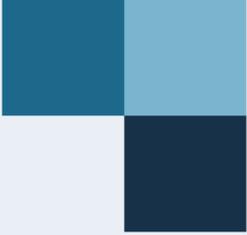
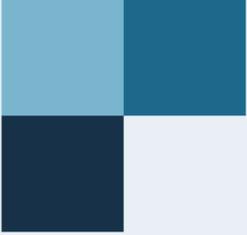
# Customer interest in electrification technologies

■ Percentage of customers who have the technology    ■ Percentage of customers who are likely to purchase or lease the technology in the next 3 years



**Base:** All respondents (n = 7,201). **Question S2\_4:** Which of the following technologies do you or someone in your household currently have? Select all that apply.  
**Base:** Respondents without the technology (n = varies by technology). **S2\_5:** On a scale of 1 to 5, where 1 means not at all likely and 5 means extremely likely, how likely are you or someone in your household to purchase or lease any of the following technologies in the next three years? **Note:** Percentages reflect those selecting a 4 or 5.

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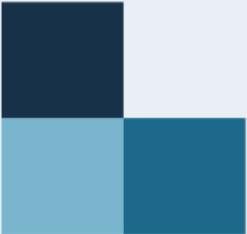
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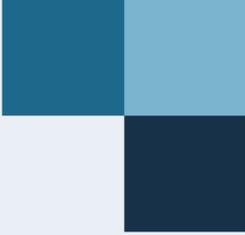
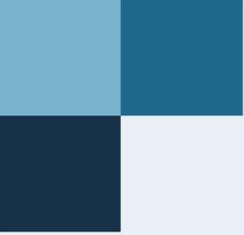
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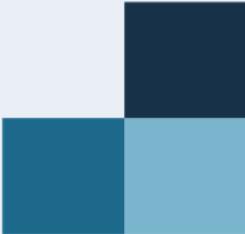
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# For more information



Courtney Welch

Associate Director, Distributed Energy Resource Strategy Service,  
Customer Energy Solutions, E Source

303-345-9192 [courtney\\_welch@esource.com](mailto:courtney_welch@esource.com)

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