

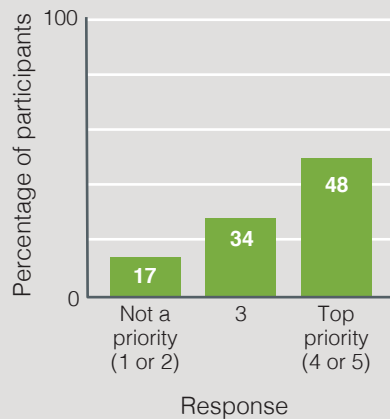


During the **2018 E Source Forum** session Strategic Electrification and the Next Generation of Efficiency Programs, we polled the audience about marketing strategic electrification. The results showed that 69% of respondents had already started or are planning to start marketing strategic electrification to their customers. This is consistent with the **2018 Utility DER Strategy Benchmark** survey, where many utilities responded that they think electrification is a priority.

Almost half of respondents see electrification as a priority



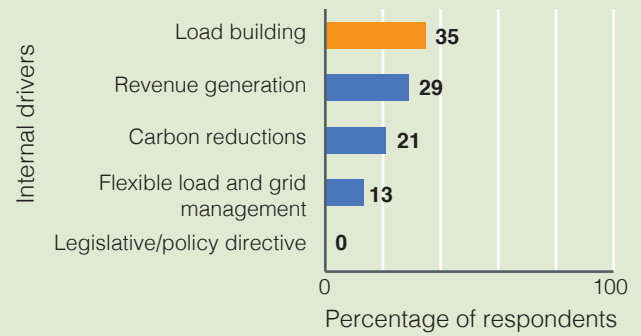
In 2017, we didn't see much utility interest in electrification. But in our 2018 Utility DER Strategy Benchmark survey, we found about half of surveyed utilities considered electrification a top priority, with only 17% saying it wasn't a priority at all.



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?

During the 2018 E Source Forum session on strategic electrification, we polled and received responses from more than 50 utilities about the drivers for considering electrification. Both internal and external drivers play a part in the growing interest in electrification, especially load building, revenue generation, flexible load and grid management, and state or local climate action plans.

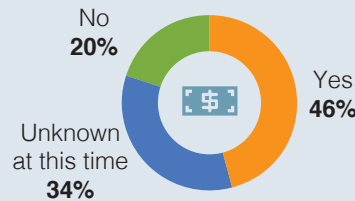
Internal strategic electrification drivers



Base: n = 52 audience participants. **Question 1:** What is the key internal driver behind your utility's interest in strategic electrification?

At our Forum session, we polled the utility audience to ask if they believed that strategic electrification would reduce their customers' bills. We found that 46% believed that strategic electrification would be cost-favorable (reduce bills) for their customers.

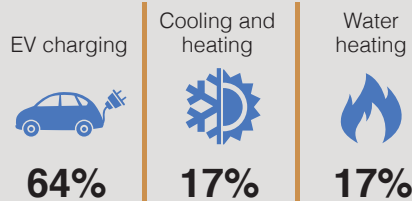
Cost-favorability of strategic electrification for customers



Base: n = 50 audience participants. **Question 5:** Is strategic electrification generally going to be cost-favorable for your customers?

In the Forum session, 64% of attendees participating in the poll said their utility was considering piloting an electric vehicle (EV) charging program. Similarly, utilities responding to the 2018 DER Utility Benchmark survey anticipate increasing their focus on and budgets for electrification technologies such as EV charging infrastructure, EV incentives and rebates, and grid-interactive water heaters.

Technological area



Base: n = 53 audience participants. **Question 3:** Which technological area is your utility focusing on for strategic electrification pilots?

External strategic electrification drivers



Base: n = 54 audience participants. **Question 2:** What is the key external driver behind your utility's interest in strategic electrification?

Check out these electrification strategy resources on our website:

- [Developing a Successful Strategic Electrification Program](#) web conference
- [2018 Utility DER Strategy Benchmark](#)
- [Strategic Electrification and the Next Generation of Efficiency Programs](#) session presentations