



***Demand Response Leadership
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Market Research Results

Spring Conference: April 2013

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Market Research by :



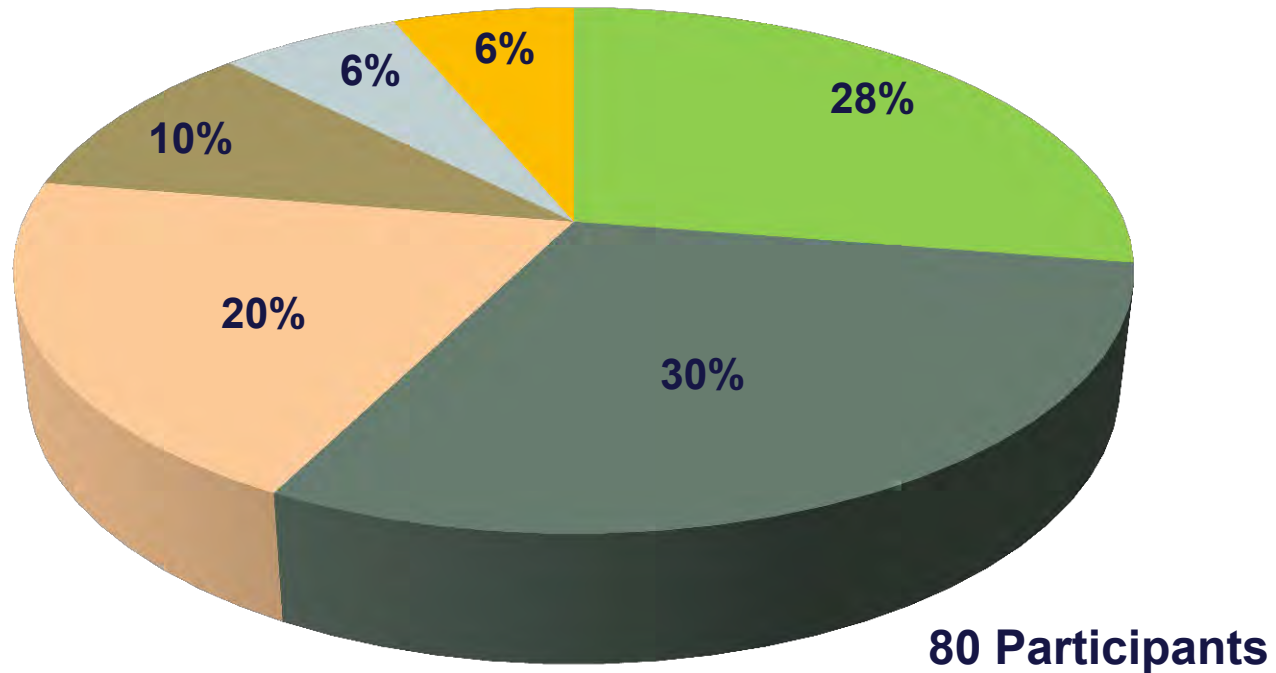
www.skippingstone.com

About the Research

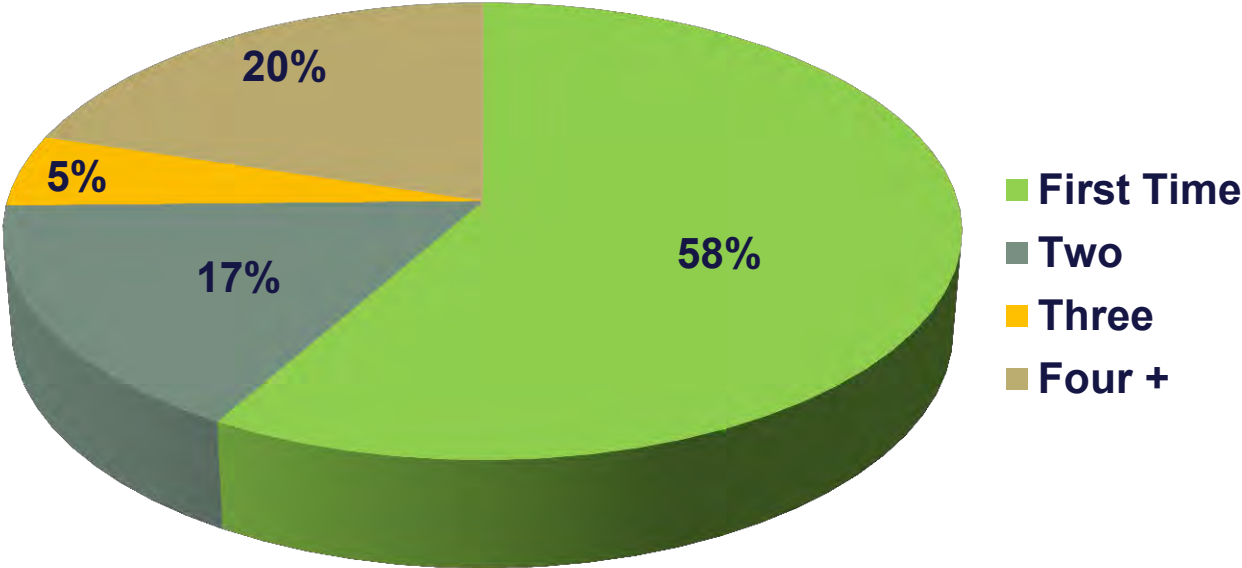
- The survey questions were prepared in advance of the spring PLMA conference based on the topics of the various speakers and panels
- 80 individuals participated in the survey. A break down of type of industries represented is provided in the results.
- The questionnaire was administered at the time of registration and before attendees heard any of the speakers or panel presentations to ensure that responses were not based or swayed by information presented during the conference.
- The survey results presented in this report in graphical form are solely based on respondent-provided answers.
- Observations presented herein are solely those of Skipping Stone.

Survey Participant Representation

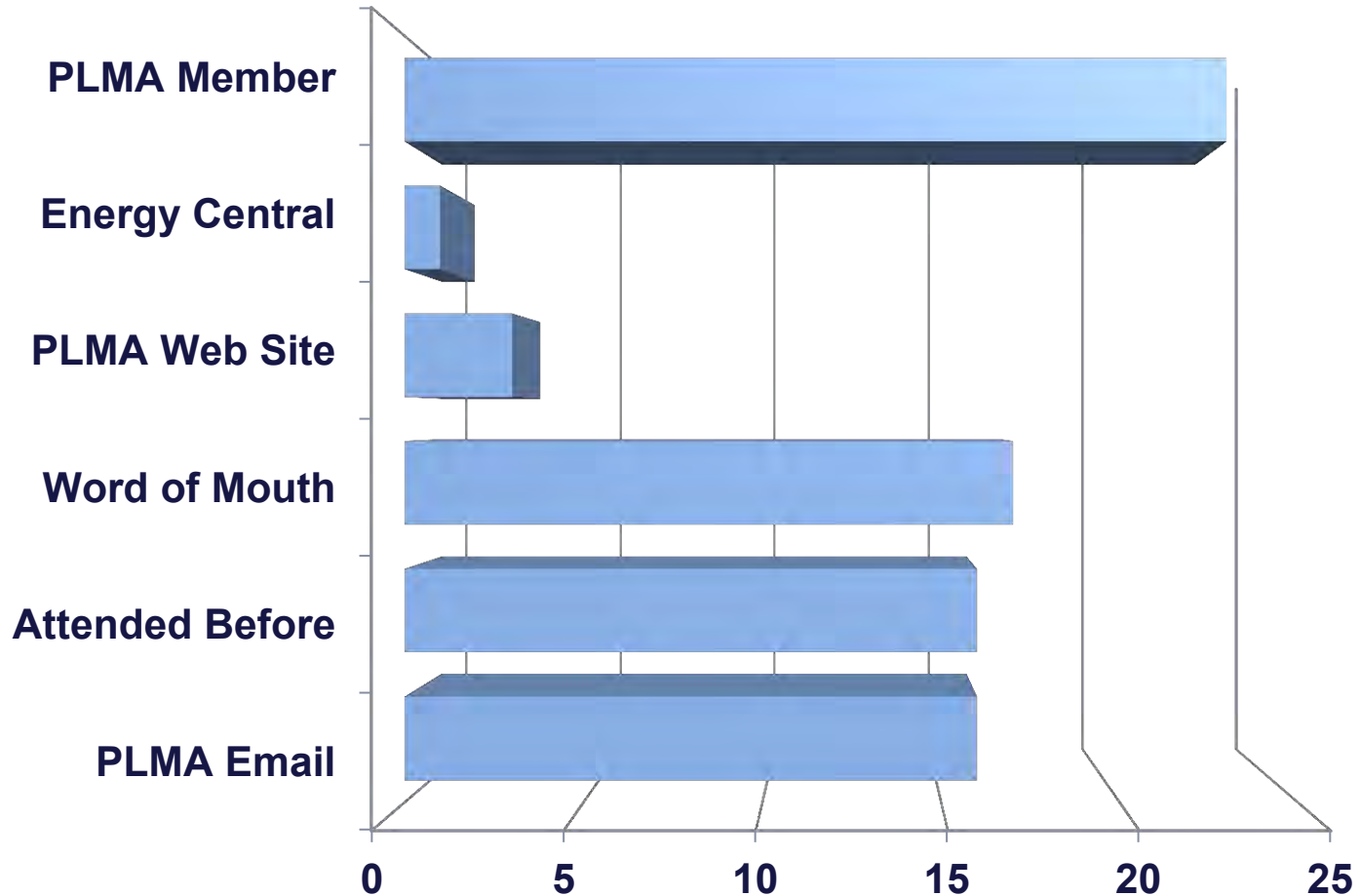
- Utility
- DR Providers
- Government
- Technology
- Professional Services
- Other



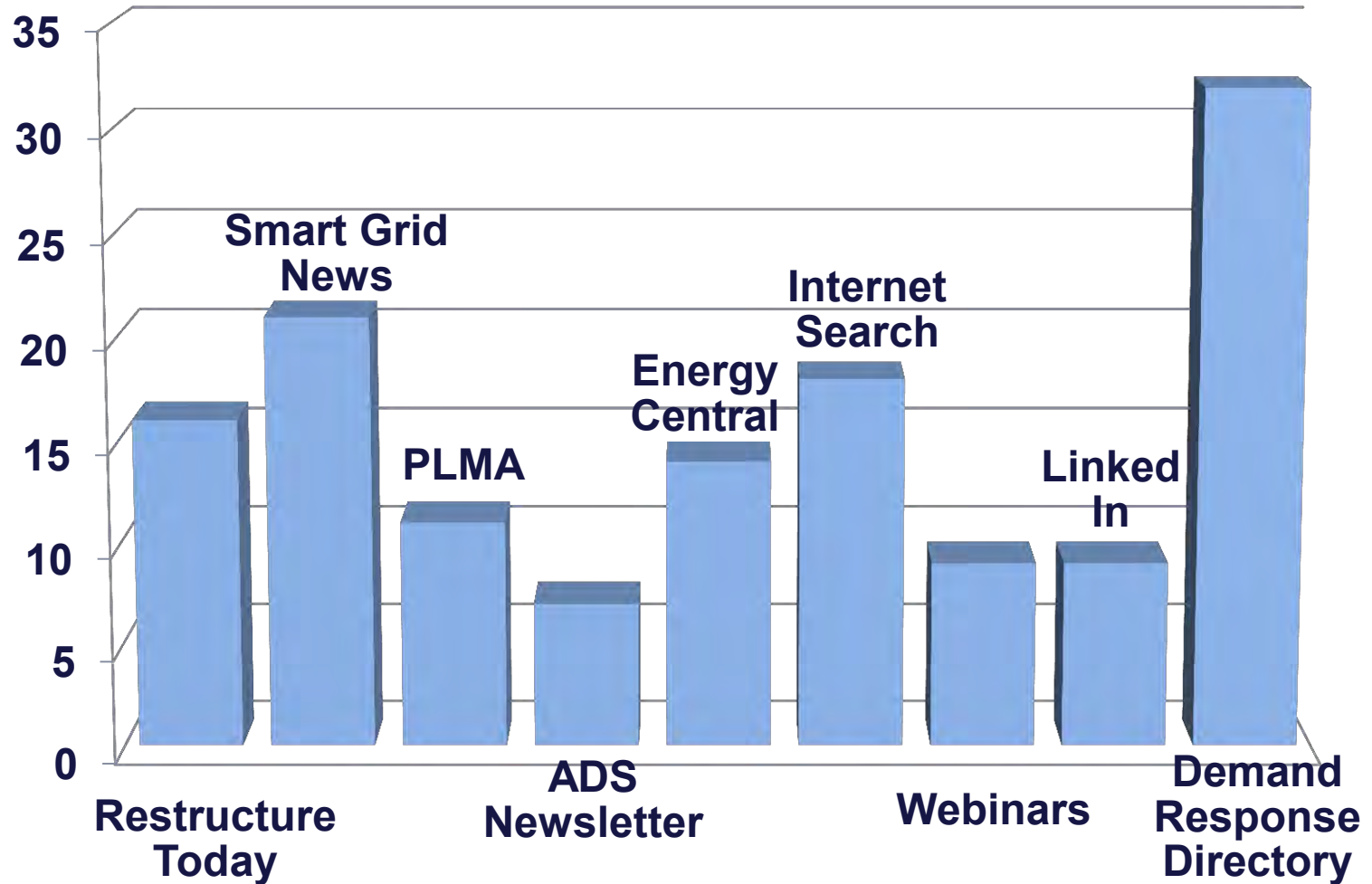
Conference Attendance Frequency



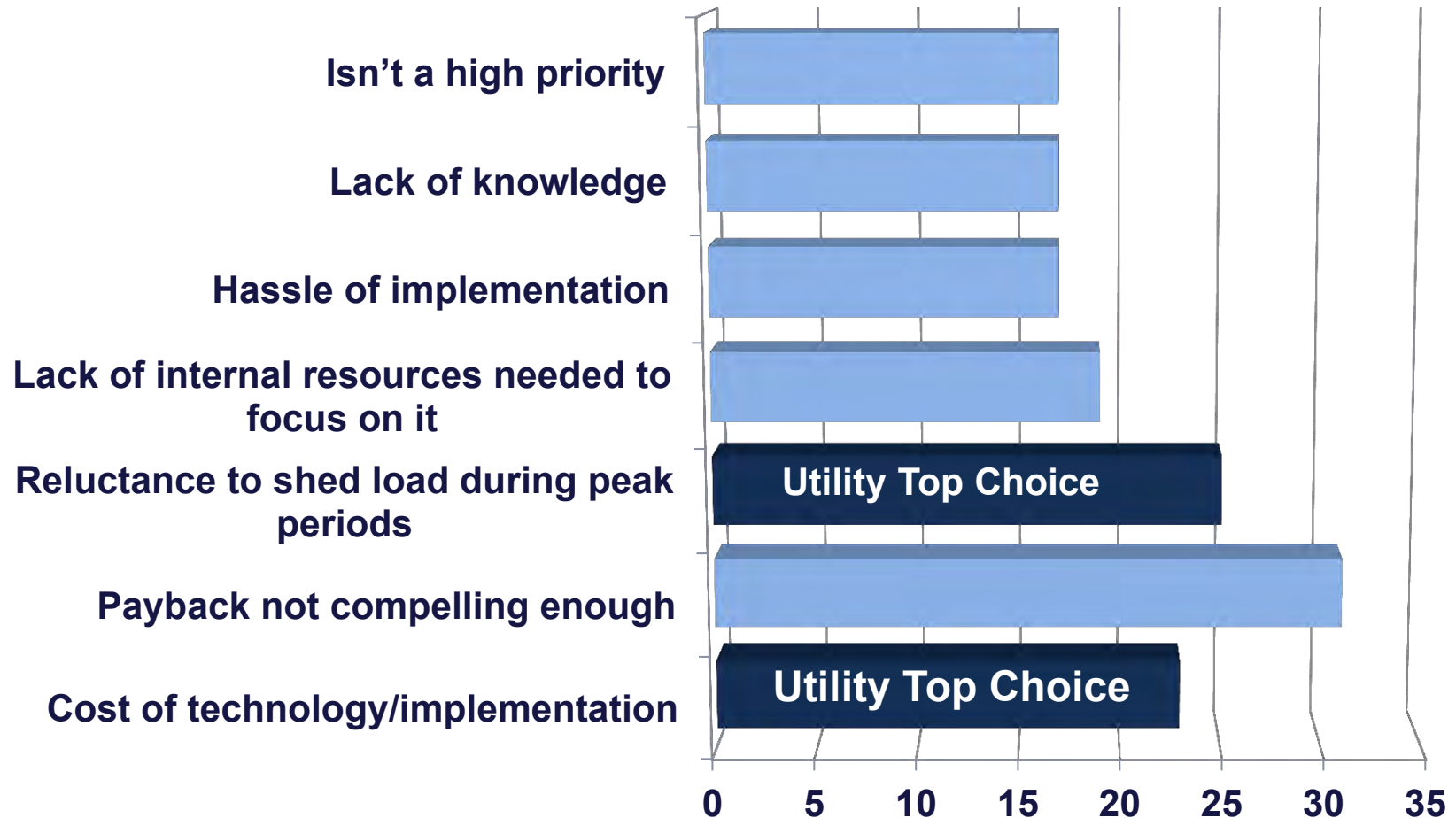
How did you hear about the PLMA Spring Conference?



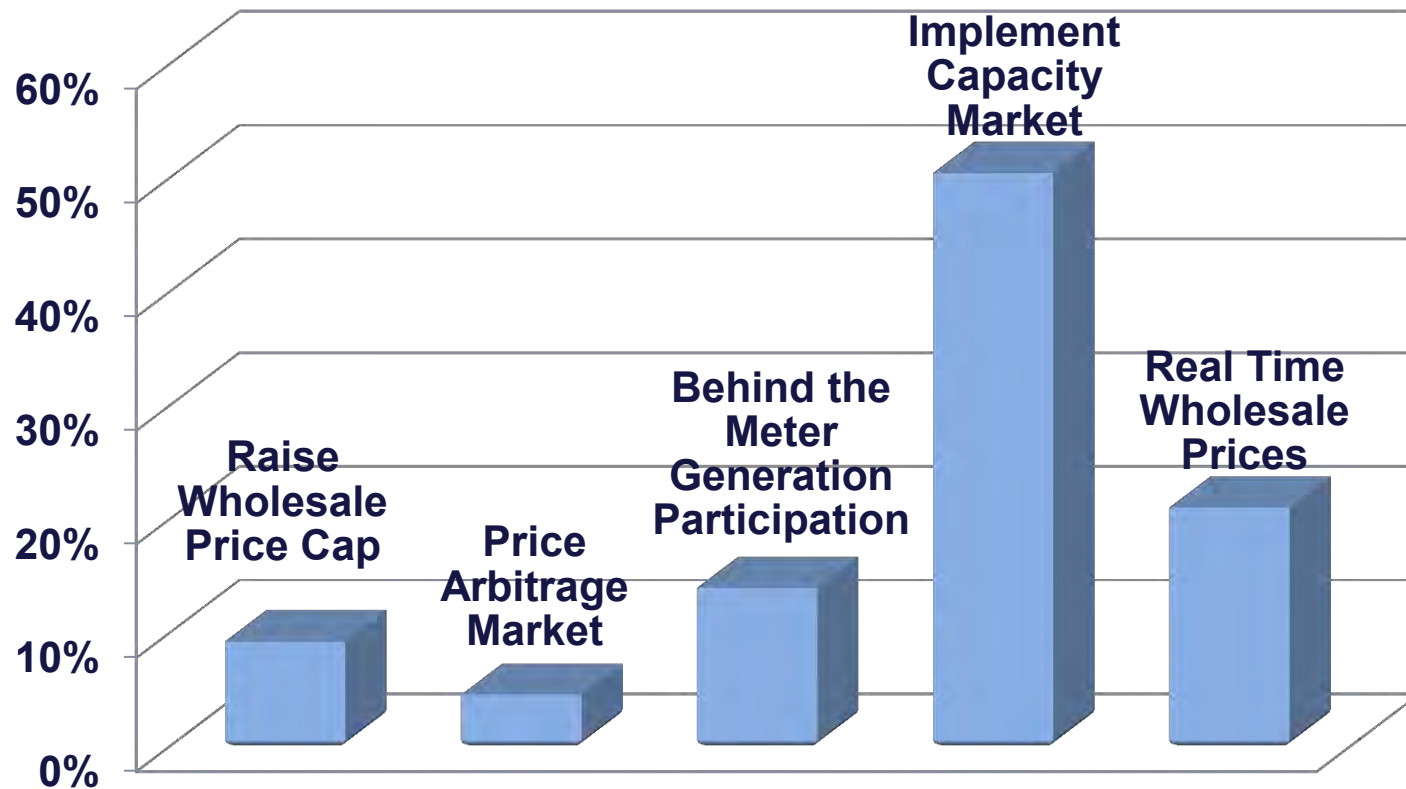
Demand Response Market Information Sources



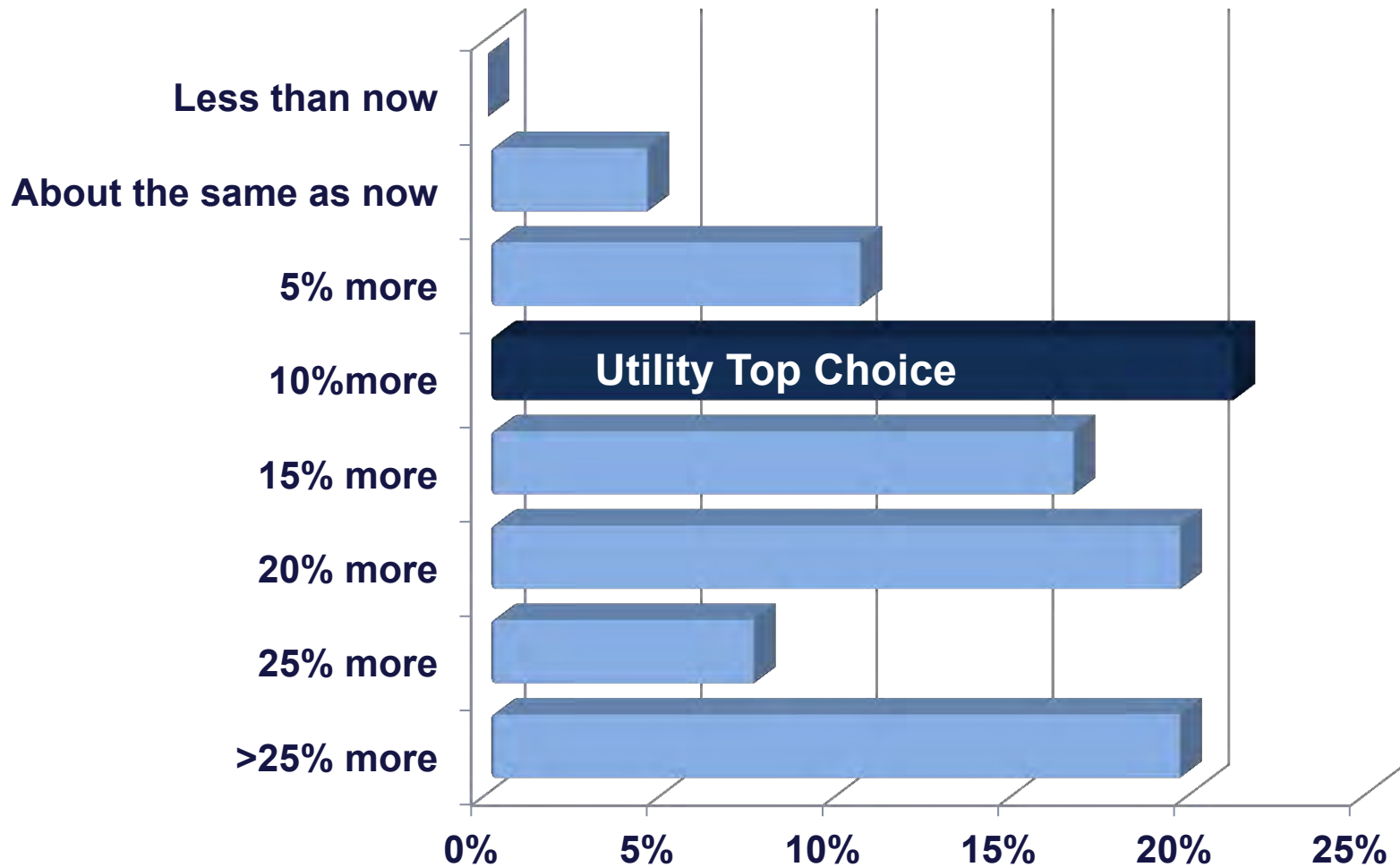
DR Participation Challenges for C&I Customers



How ERCOT and Texas Should Address Resource Adequacy Issues



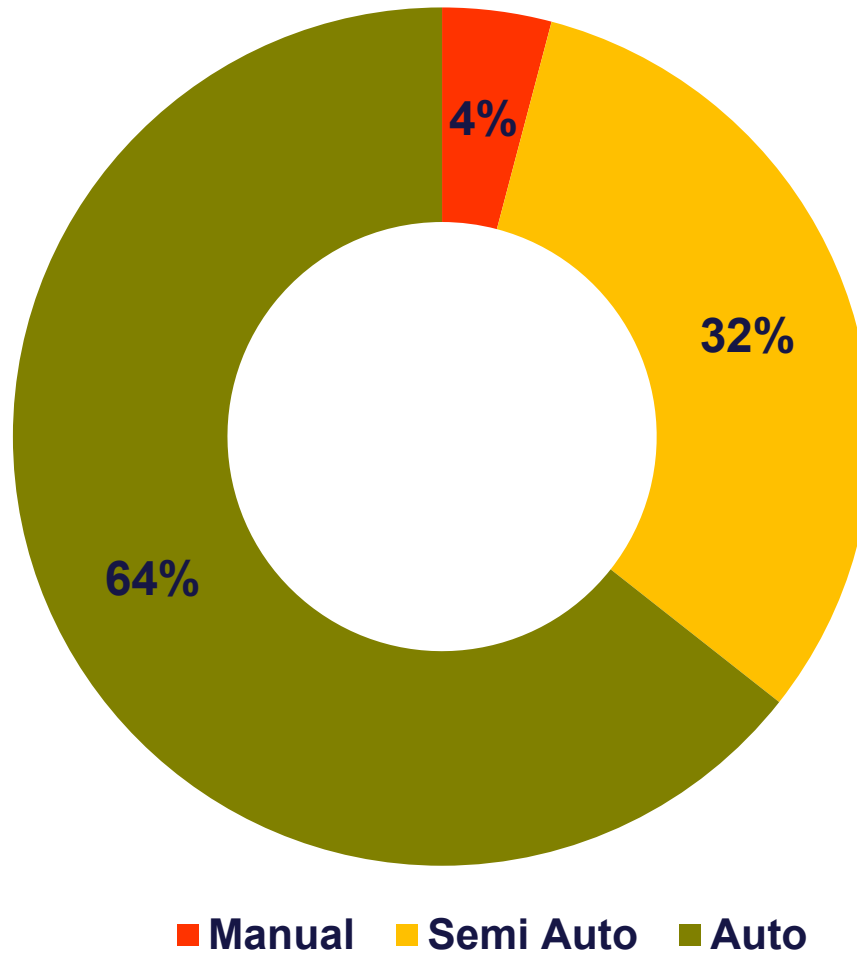
DR Market Growth in the Next 3 Years



Economic and Regulatory Drivers Rankings

	Spring Rank	Previous Rank
Customer ROI	1	3
ISO Capacity Prices	2	2
Utility Incentives	2	1
Regulatory Certainty	4	4
Higher Wholesale Energy Prices	5	n/a
NERC Counting DR for Reliability	6	5
Technology Innovation	7	6
DR Provider Competition	8	7

Which Methodology Will Customers Use

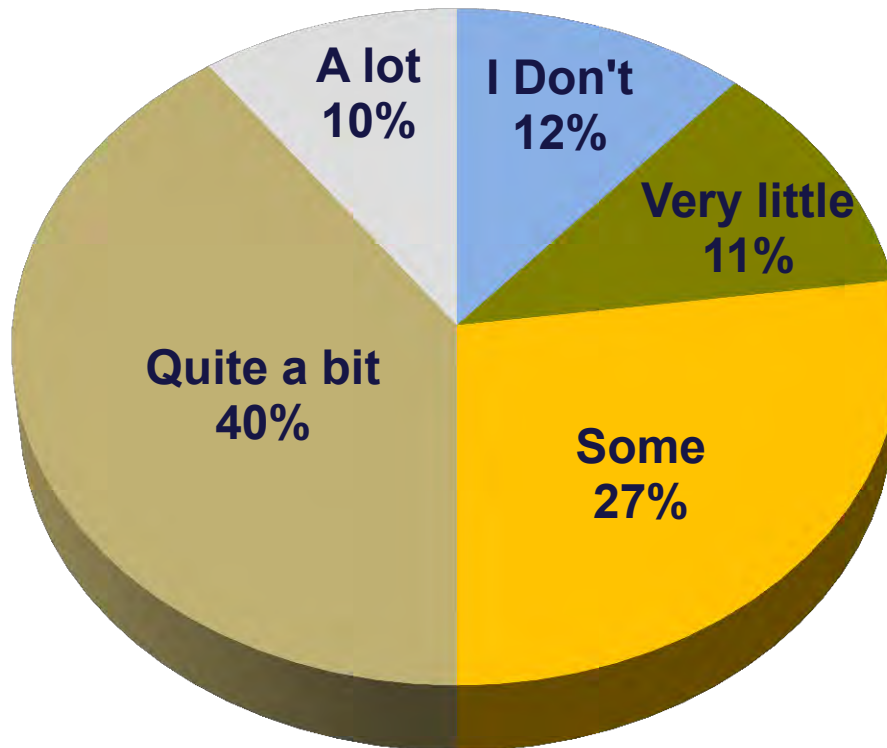


DR Growth by Market & Market Design Rankings

Market Growth	Most	Least
PJM	#2	
ERCOT	#1	
NYISO		
CAISO	#4	
ISO NE		
MISO		#1
TVA		#4
BPA		#2
Utility Programs	#3	
Municipal Programs		#3
Coop Programs		
Other		

Market Design	Rank
PJM	1
NYISO	2
ERCOT	3
ISO NE	4
CAISO	5
MISO	6

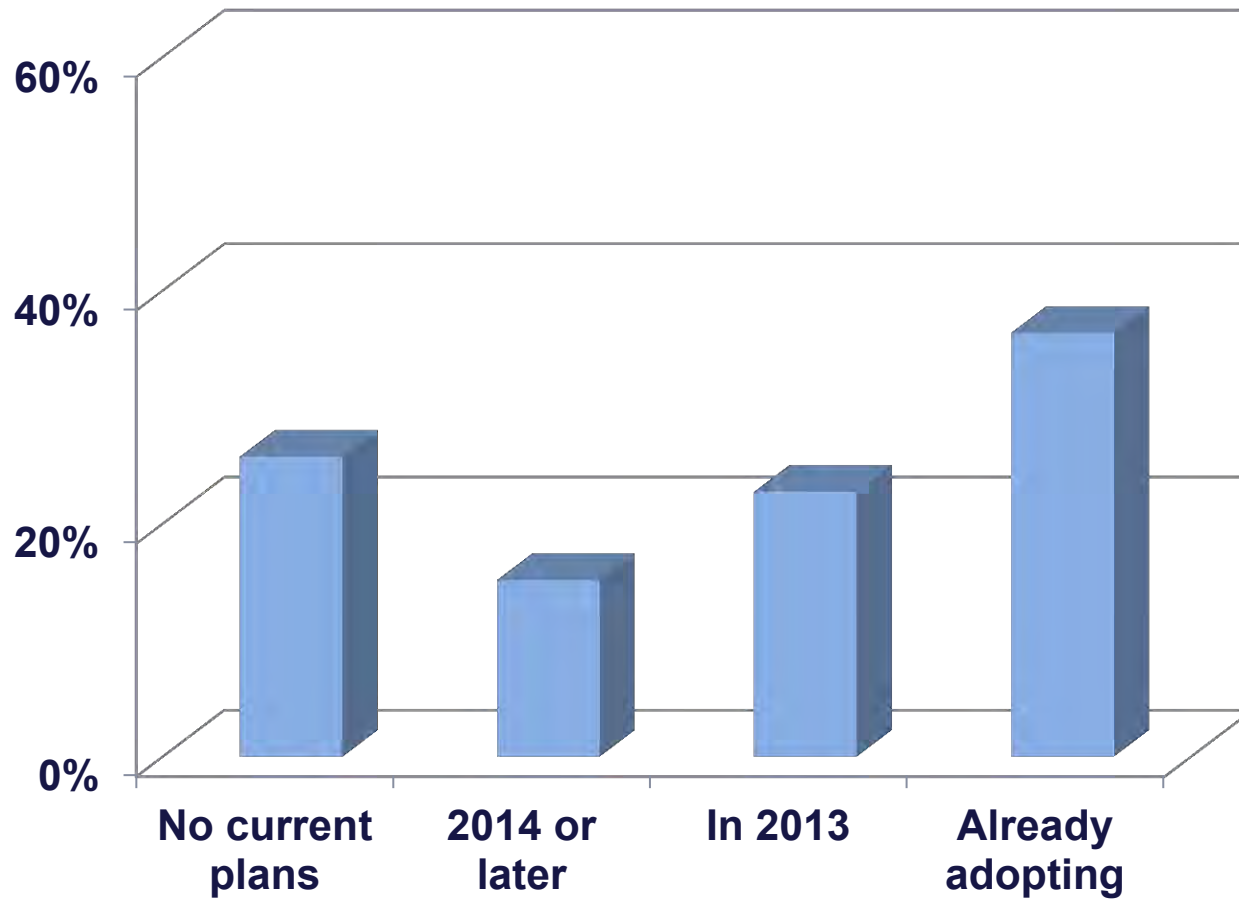
How Much Do You Know About Fast DR?



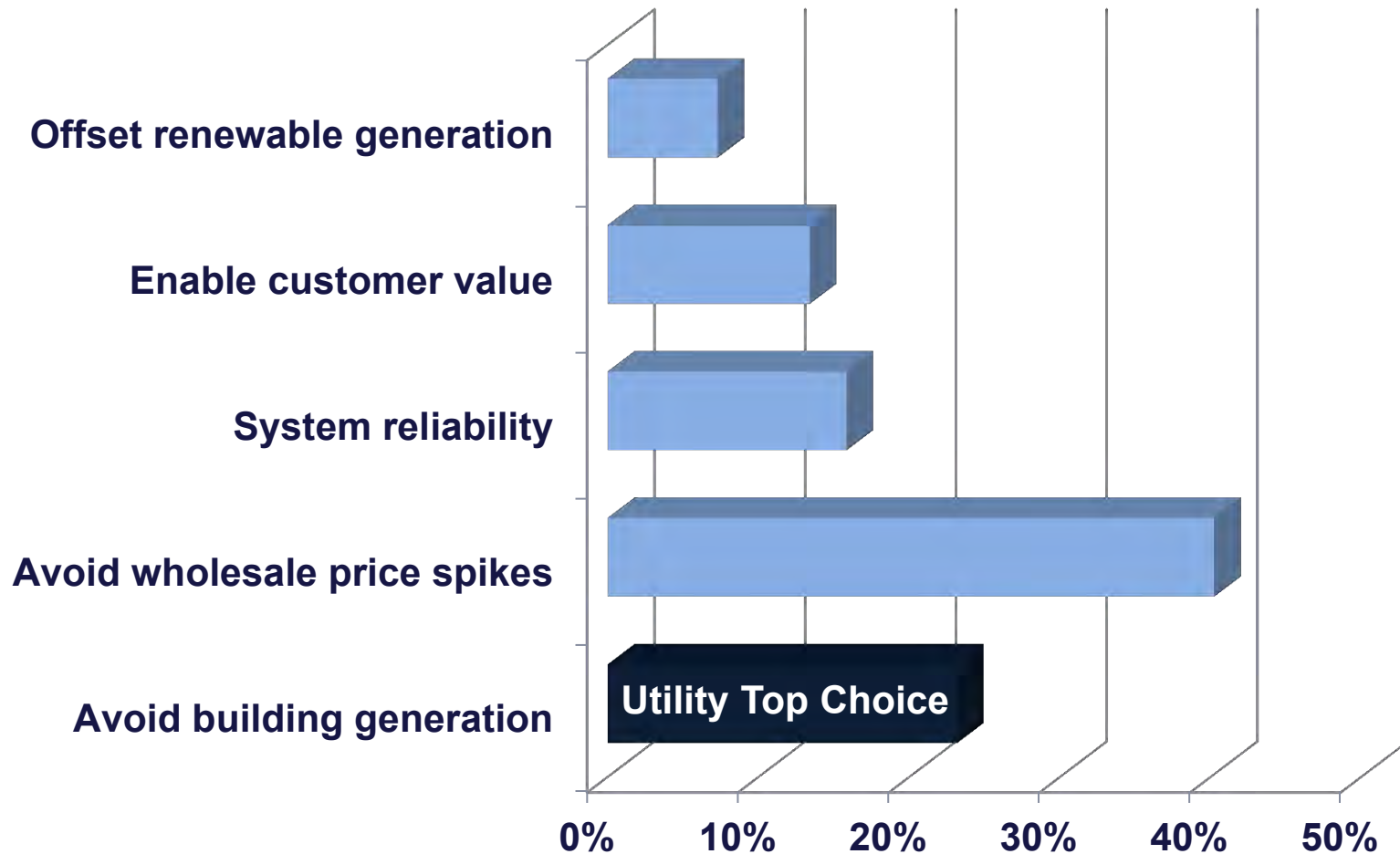
42% of Utilities indicate little or no knowledge about Fast DR

When Do You Plan to Adopt OpenADR2?

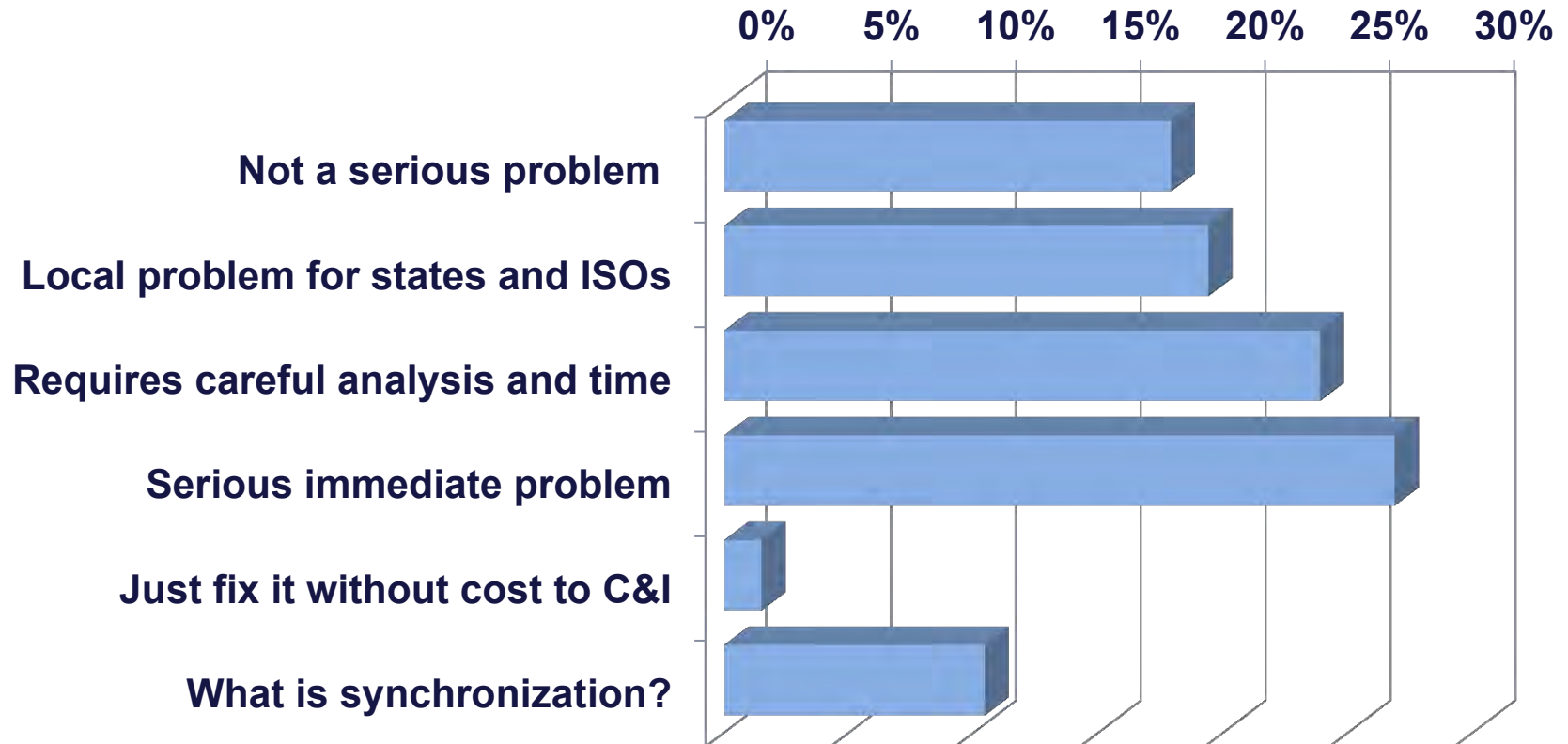
60% of Utilities are adopting OpenADR2



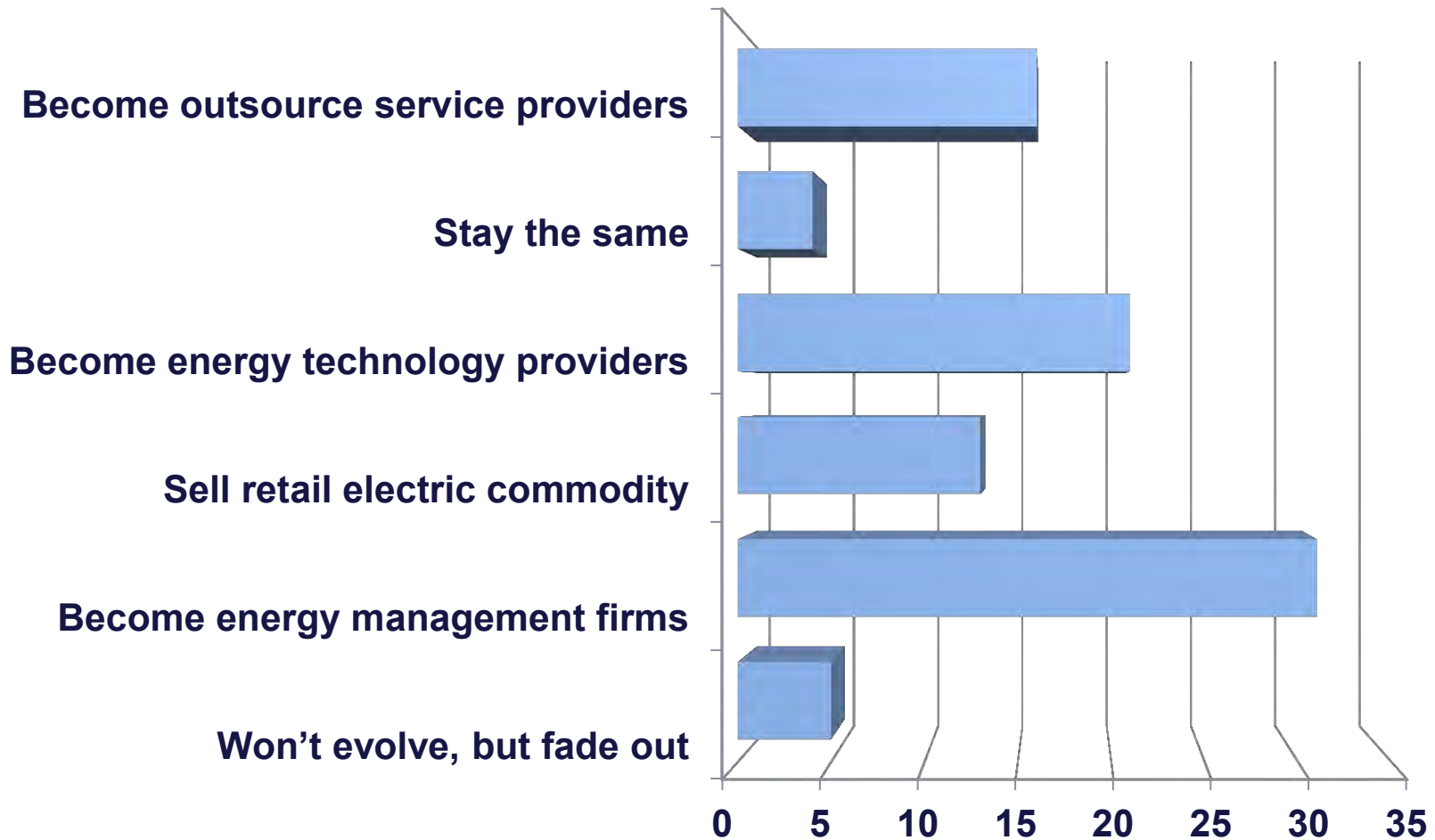
Most Compelling Reason Munis and Coops Will Grow DR Programs



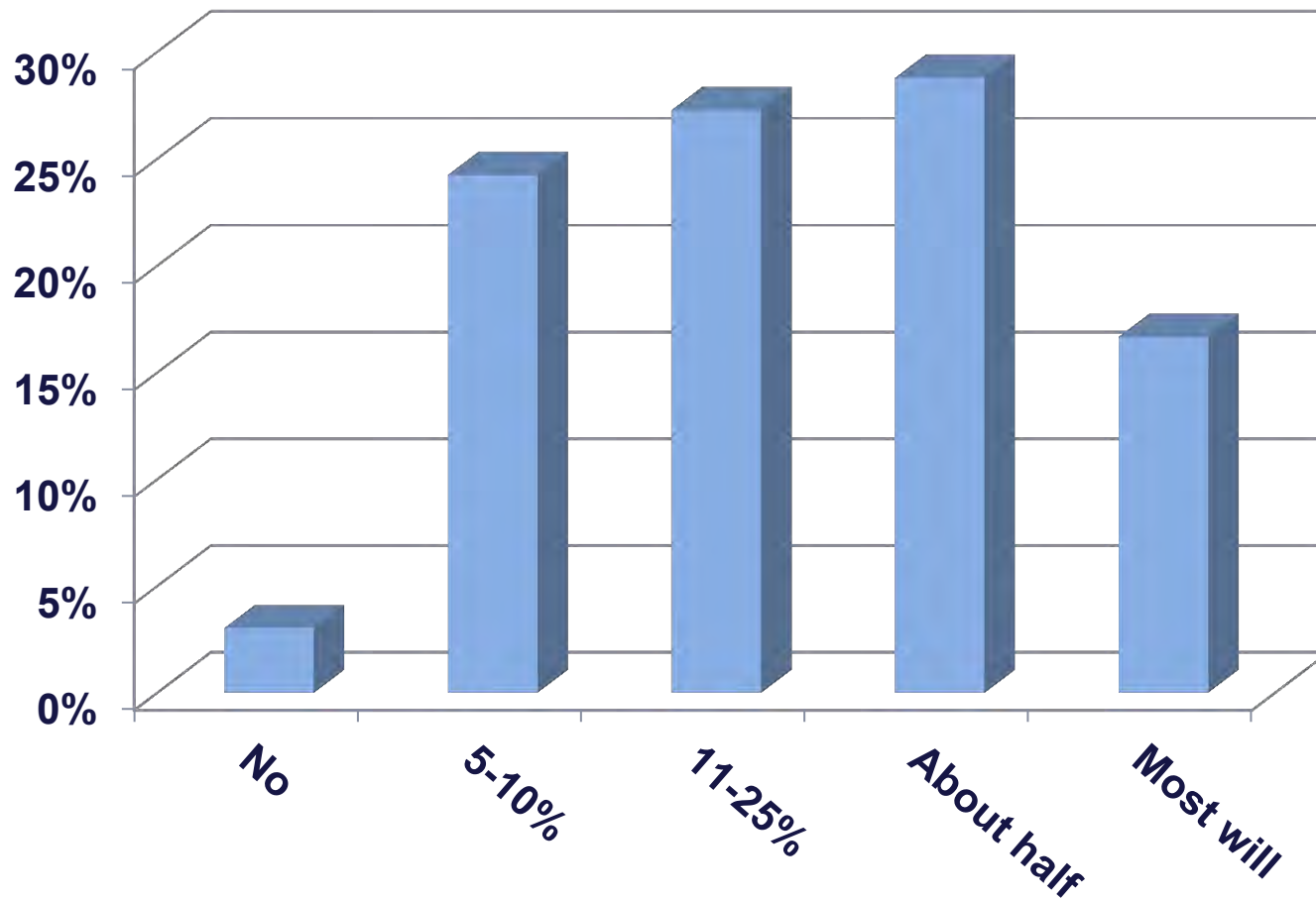
Natural Gas and Electricity Markets Synchronization and Grid Reliability



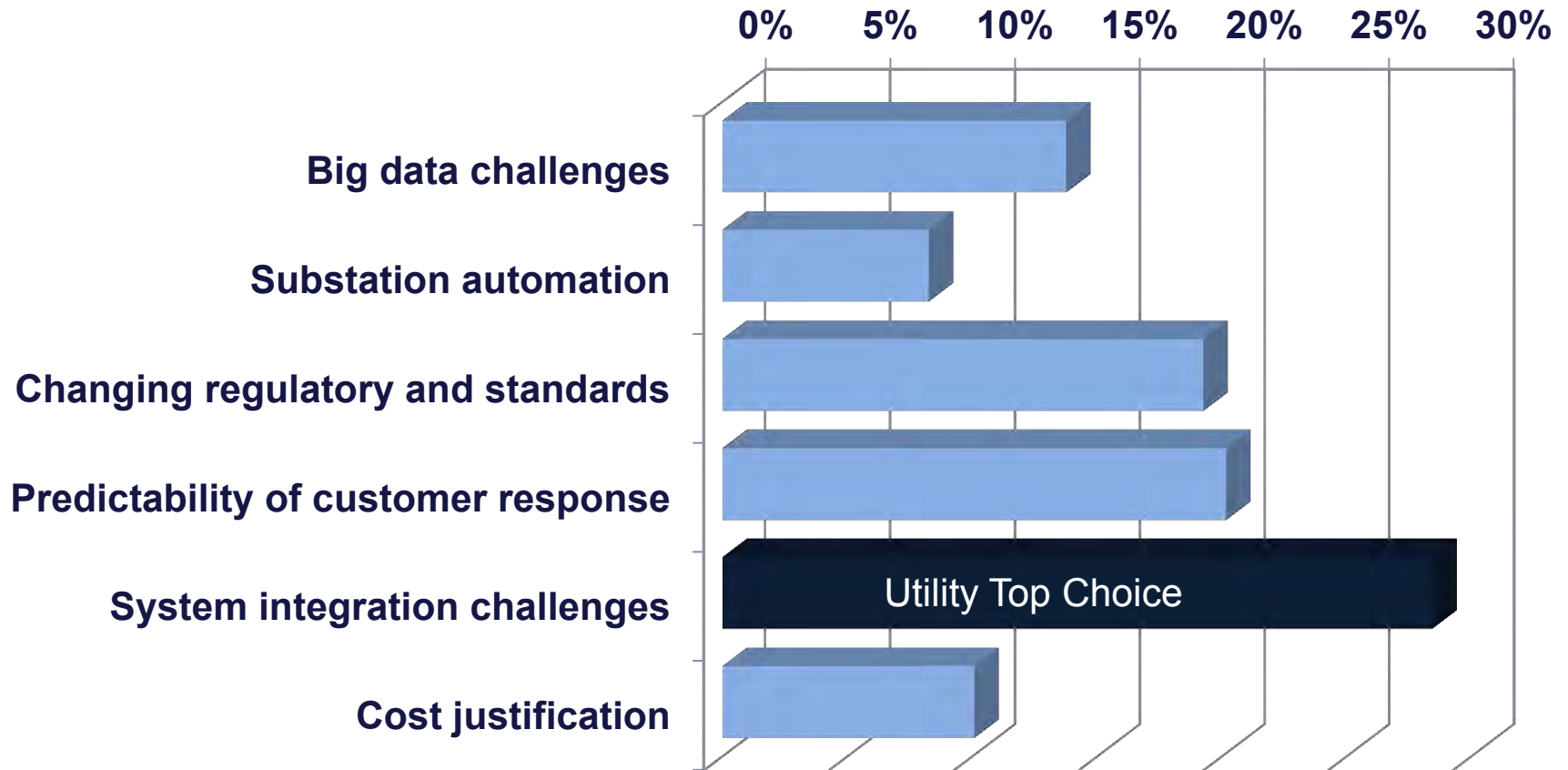
How Will CSPs Evolve?



Will More Retail Energy Marketers and Brokers Enter the DR Market?



Biggest Challenges for Utilities in T&D planning due to Demand Response?



The Demand Response Directory

- All U.S. C&I DR Programs in a searchable database
 - Over 1,900 programs
- DR Service Provider Listings
 - Where customers go for help
- DR Free Library
 - Over 150 reports, papers, presentations and more

Database of U.S. C&I DR Programs	Service Provider Listings
1,900+ C&I DR Program Descriptions with links to detailed information	Software Solutions
500+ Summary Reports Available For all Utilities & ISOs with DR Programs	Hardware Solutions
LEED DR Credit listings for Qualified Programs	Engineering Services
Searchable Database by State and Program Provider	Consulting Services
Print or download Summary Reports	Curtailment Providers
First 3 Summary Reports are Free	Outsourced Services





All of our consultants are energy industry veterans who now choose to consult. Our specialty is collaborating with clients on ideas, strategies and tactics, and then providing the array of services required to turn those ideas into successes.

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Market Focus



Power Markets



Demand Response



Natural Gas Markets



Renewable Energy



Energy Technology



Energy Management

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- Leadership consists of the Officers, Executive Committee, Committee Chairs, and Board Members
- Over 40 members include utilities, service providers, technology companies, consultants, and customers
- Membership is open to anyone interested in demand response

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