



The Business of Energy Efficiency

2009 Competitive Retailer
Appreciation Meeting



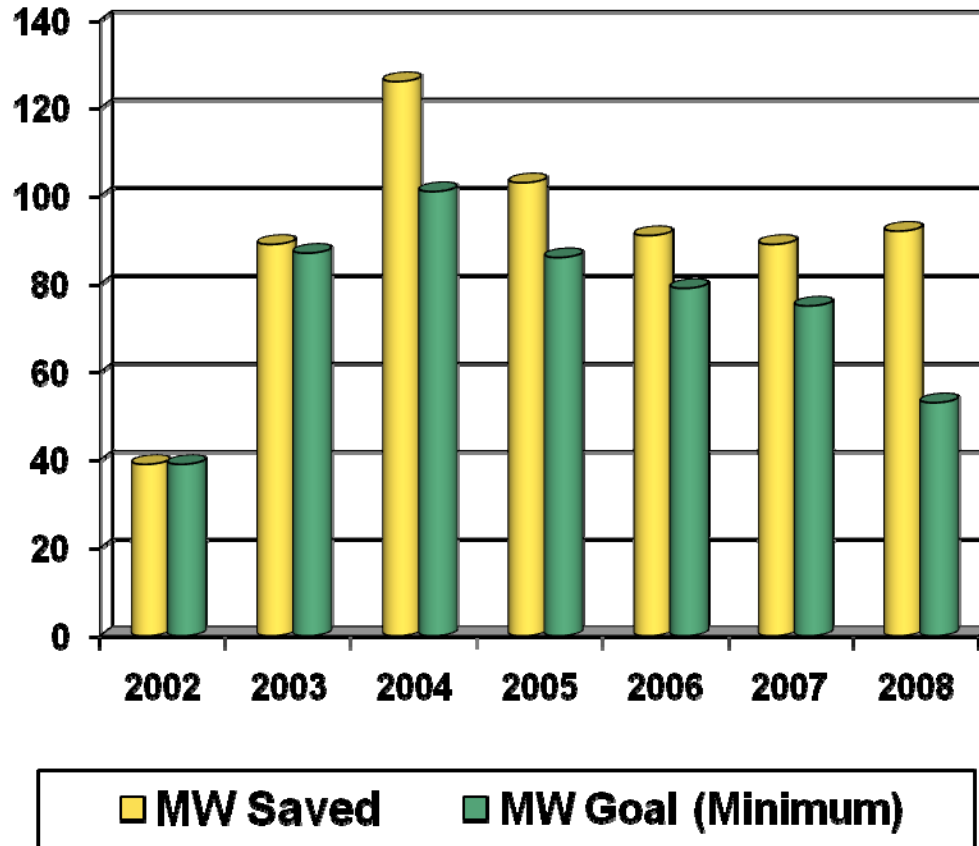
- **The Market for Energy Efficiency**
- **How to Respond?**
- **A New Opportunity**

Overview



- **Oncor is committed to promoting energy efficiency to help consumers manage their energy consumption, which impacts both the environment and their electricity bills.**
- **In 2009, Oncor will invest approximately \$73 million in energy efficiency programs.**
- **Oncor's commitment to energy efficiency makes it the leading investor in Texas.**
- **According to the Department of Energy (2009), Oncor is ranked 12th nationally in spending for energy efficiency programs.**
- **Since 2002, over 450,000 customers have participated in Oncor's programs.**

Program Results



- Spent over \$299 million from 2002-2008
- Reduced over 636 MW of peak demand and saved over 1.5 million MWhs
- Since 2002, CO₂ reduction equal to removing over 250,000 cars from Texas highways
- In the past seven years, statewide, Oncor has saved approximately 54% of the kW and 47% of the kWh and accounted for approximately 58% of the total funds spent on energy efficiency

Program Expenditures

2002	2003	2004	2005	2006	2007	2008
\$22M	\$38M	\$60M	\$50M	\$21M	\$43M	\$53M



The Market for Energy Efficiency - *What are Consumers Thinking?*

Residential Consumer Attitudes



Home Improvement Research Institute (May 2009):

- *74 % of consumers said it was very important to reduce household energy costs or utility bills through energy efficient improvements.*
- *Compares to only 49 % who said it was very important to reduce household's contribution to global warming through energy-efficient improvements*

Eco Pulse 2008 (May 2008):

- *Given a choice between comfort, convenience or the environment
46% comfort; 23 % convenience; 31% environment*
- *70% of consumers felt it was Important or Very Important for energy companies to offer audits and rebates to help them reduce their energy bill.*
- *70% also feel better about their energy company if they offer energy audits and rebates to help them reduce their energy bill.*

Commercial Customer Attitudes



An April 2009 survey of 1,400 executives responsible for managing, reviewing or monitoring energy use within their organizations found the following:

Enthusiasm for energy efficiency remains strong.

- 71% are paying more attention to energy efficiency than they were one year ago.**
- 58% continue to say that energy management is very or extremely important.**

Business leaders now have a greater anticipation of regulation and incentives.

- 85% think that significant legislation mandating energy efficiency and/or carbon reduction is likely within the next two years, up from 76% in 2008.**
- 44% say energy company or government incentives are very/extremely influential in making energy efficiency decisions, up from 38% in 2008.**



How to Respond?

Leverage Existing Resources

Meeting Consumers Needs



- **Prices**
- **Fees**
- **Policies**
- **Marketing Strategy**
- **Customer Service**
- **Programs**

Energy Efficiency Programs



- **Oncor offers 31 programs that target these markets:**
 - Residential
 - Commercial
 - Educational
 - Government
 - Nonprofit
 - Worship
- **Subject Matter Experts on energy efficiency**
 - Take A Load Off, Texas®

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ONCOR'S ENERGY HEROES

Marie James from Frisco, Texas
Marie and her family change all their light bulbs to CFLs.
[Be our next hero, send us your energy saving story.](#)

TAKE THE ENERGY EFFICIENCY QUIZ

Test Your EE Smarts in a quick, 10 question quiz then challenge your friends and family. ▶

ONCOR EFFICIENCY FAQs

OUR EXPERTS ANSWER VALUABLE ENERGY EFFICIENCY QUESTIONS. ▶

ENERGY EFFICIENCY TIPS

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UPCOMING EVENTS

May 15, 2009 – May 17, 2009
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June 5, 2009 - June 7, 2009
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September 25, 2009 – October 18, 2009
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2010 ENERGY STAR Award Applications Available

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**A New Opportunity –
*Green House Gas Regulation***

Pew Center on Climate Change corporate energy efficiency strategy survey (2009)

- *Surveyed 48 companies with revenues between \$8 billion and \$99 billion.*
- *98% believe regulations mandating GHG reductions will occur within the next 2 years.*
- *40 companies responded that energy efficiency was a strategy to reduce carbon footprint.*
- *39 companies have modified their products and services to energy efficiency.*
- *55% have measured the energy footprint of their products or services.*

Carbon Mitigation Strategies



- **Energy Audits**
 - **Commercial**
 - **Residential**
- **Equipment upgrades**
 - **Home Energy Efficiency Program**
 - **Commercial Standard Offer Program**
 - **Educational Facilities Program**
 - **Government Facilities Program**
- **Green Technologies**
 - **Solar PV Program**
 - **Solar Water Heating**

Summary



- **Oncor has tools to help you with your customer's needs**
- **Subject matter experts with many years of industry experience**
- **31 different programs for every customer segment**
- **Online tools for your staff to use to become subject matter experts.**



Questions?