

AmerenUE DSM Market Potential Study: Overview*

Overall objectives:

1. Assess and understand technical, economic, achievable and naturally occurring potential for all customer segments in the AmerenUE service area from 2009 to 2028
2. Analyze energy-efficiency and demand-response initiatives at various levels of cost
3. Conduct primary market research to collect electricity end-use data and customer psychographics and to understand how customers in the AmerenUE service territory make decisions related to their electricity use and energy efficiency investments
4. Develop several scenarios for assessing DSM potential

Primary market research:

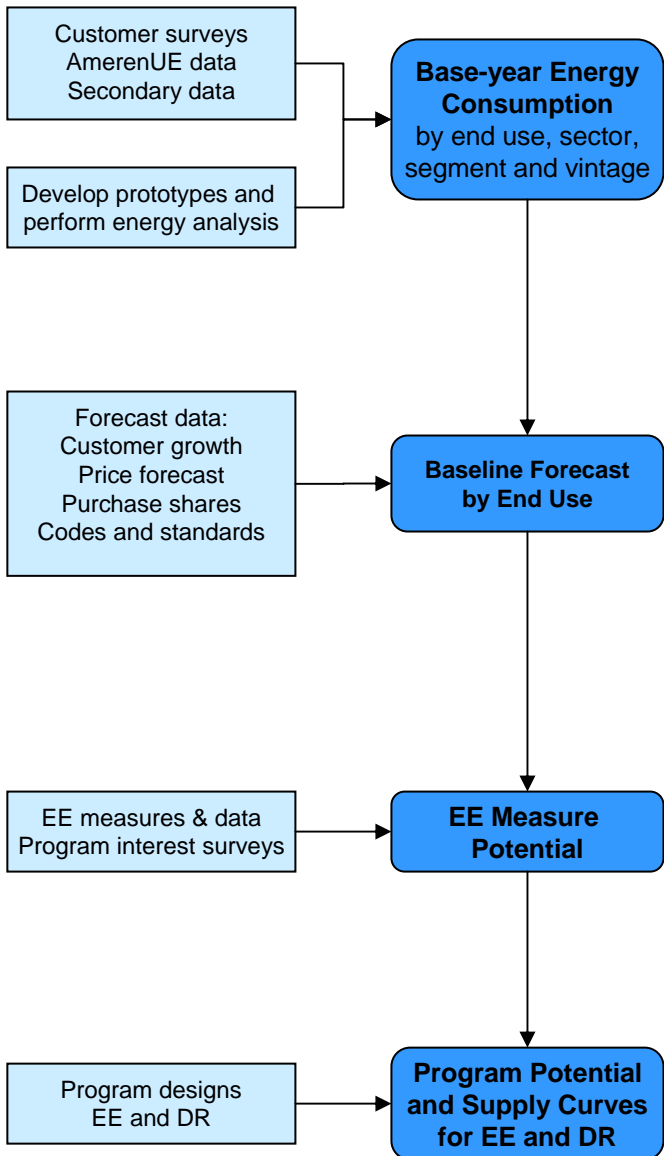
Residential sector:

-- Online research with 2,000 residential customers

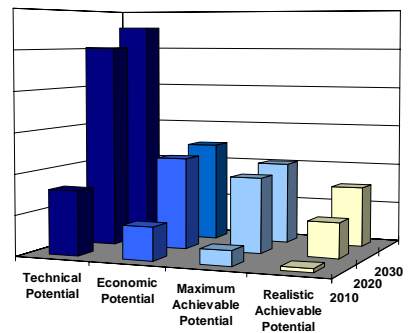
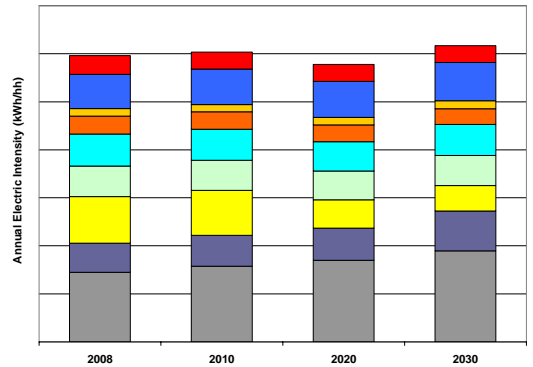
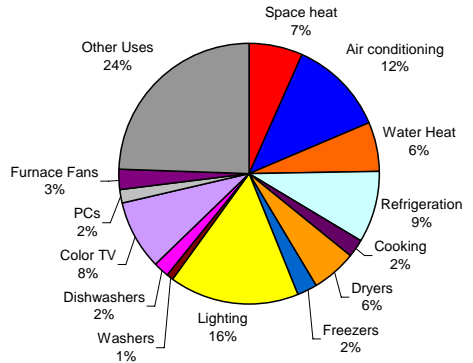
Business sector:

-- Online research with 2,000 commercial and industrial customers
 -- Onsite surveys with AmerenUE's Top Accounts

Interviews with trade allies

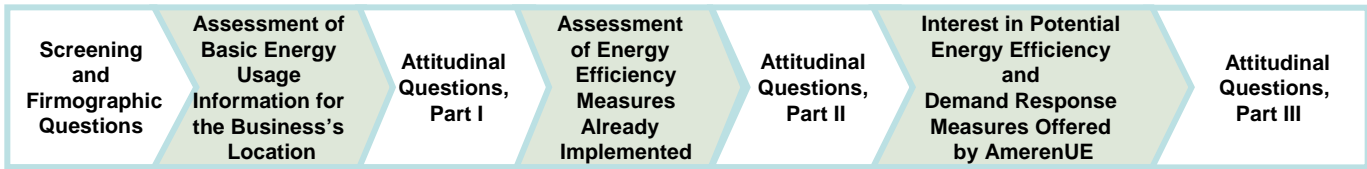


Midwest Residential (305 TWh)



*Study results will be finalized 4Q 2009

AmerenUE DSM Market Potential Study: Program-Interest Research

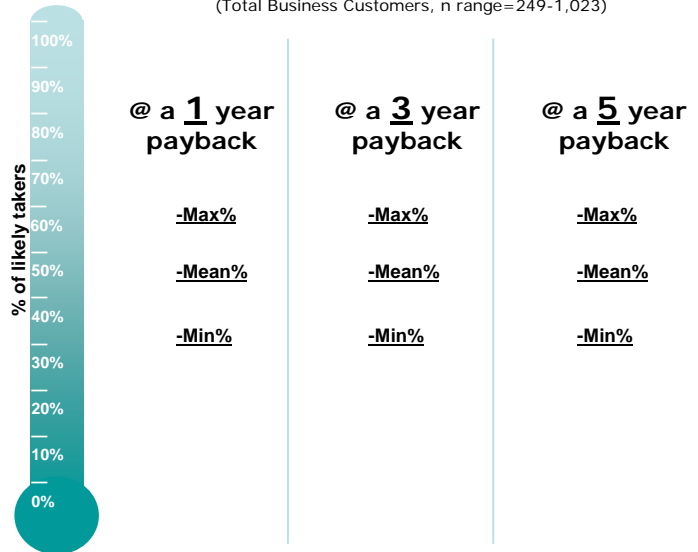


Examples of program concepts tested:

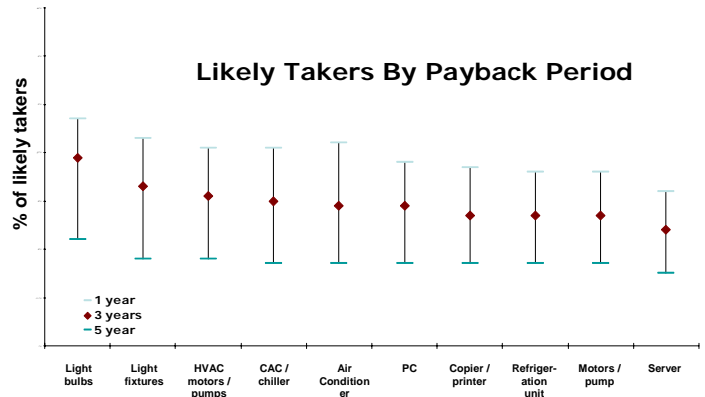
- How likely would your business be to buy the higher than standard efficiency model (and take the rebate), rather than buying an equivalent standard efficiency model of each item?
 - Purchase a higher than standard efficiency air conditioner
 - Purchase a higher than standard efficiency server
 - Purchase higher than standard efficiency light bulbs
 - Purchase higher than standard efficiency motors or pumps
- How likely would your organization be to make each improvement (and take the rebate)?
 - Install an Energy Management System
 - Perform regular maintenance on your cooling system to improve its performance
 - Install solar panels on your roof to provide some of your heating and / or water heating needs
 - Upgrade portions of your lighting system including fixtures, lamps and/or ballasts
- Please indicate how likely your business is to undertake energy conservation measures such as turning down the office thermostat or reducing the temperature of your hot water heaters.

Likely Takers by Payback Period

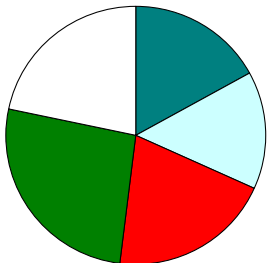
(Total Business Customers, n range=249-1,023)



Likely Takers By Payback Period



Segmentation of business customers will provide insights for targeting and marketing utility programs



- EE Actives
- Active Energy Managers
- EE Enthusiasts
- Green but EE Wary
- EE Considerers
- Cost Focused
- Disgruntled and Uninterested

EE Enthusiasts segment is a high priority.

Very receptive to messages on both the social responsibility of conservation and cost-savings, though cost savings may be a stronger message.

Have highest opinions of AmerenUE as their utility, and a “green” provider, making them likely to trust AmerenUE as a reliable source for energy efficiency suggestions.

Have a history of engaging in EE behaviors and are likely to continue doing so in the future. Despite this, there is a lot of potential ground to be gained in terms of participation in rebate programs, increased CFL usage, and other EE behaviors. Additional education is needed on the benefits of CFL usage and rebate programs.