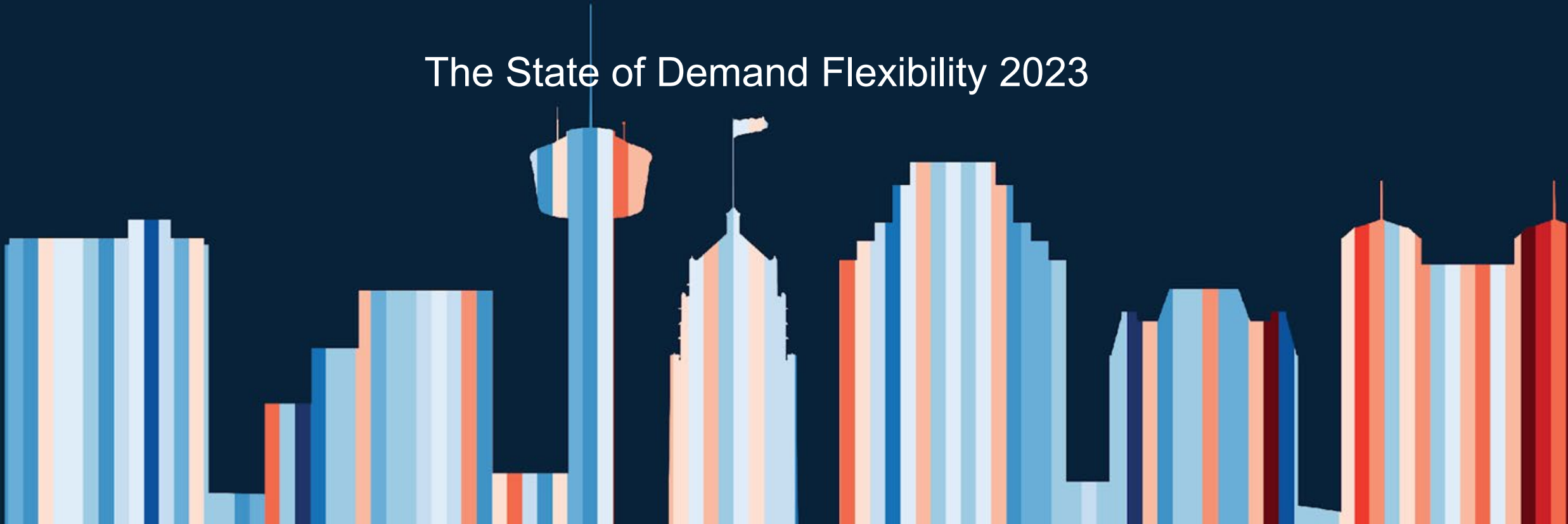


Demand Flexibility Report Findings

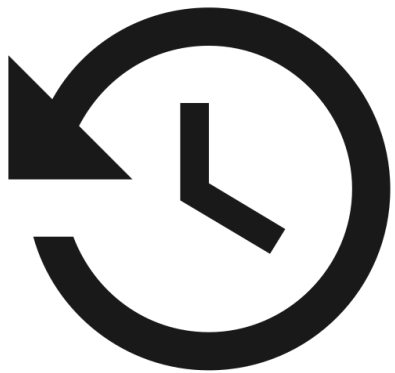
The State of Demand Flexibility 2023



Key Stakeholders

The logo for AESp, featuring a stylized 'A' in orange, 'E' in green, 'S' in yellow, and 'P' in cyan.The logo for zpryme, consisting of a blue geometric icon above the word 'zpryme' in a lowercase, blue, sans-serif font.The logo for DOER/MAKER, with 'DOER' in white, a green slash, and 'MAKER' in white, all in a bold, uppercase, sans-serif font.

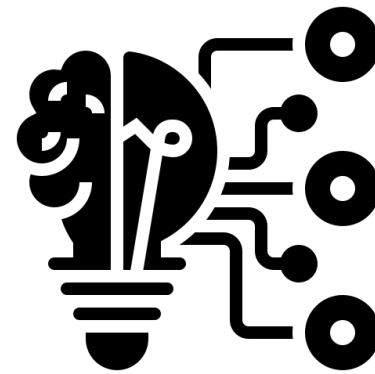
Our Goal for this Report



Brief History



Importance/Urgency

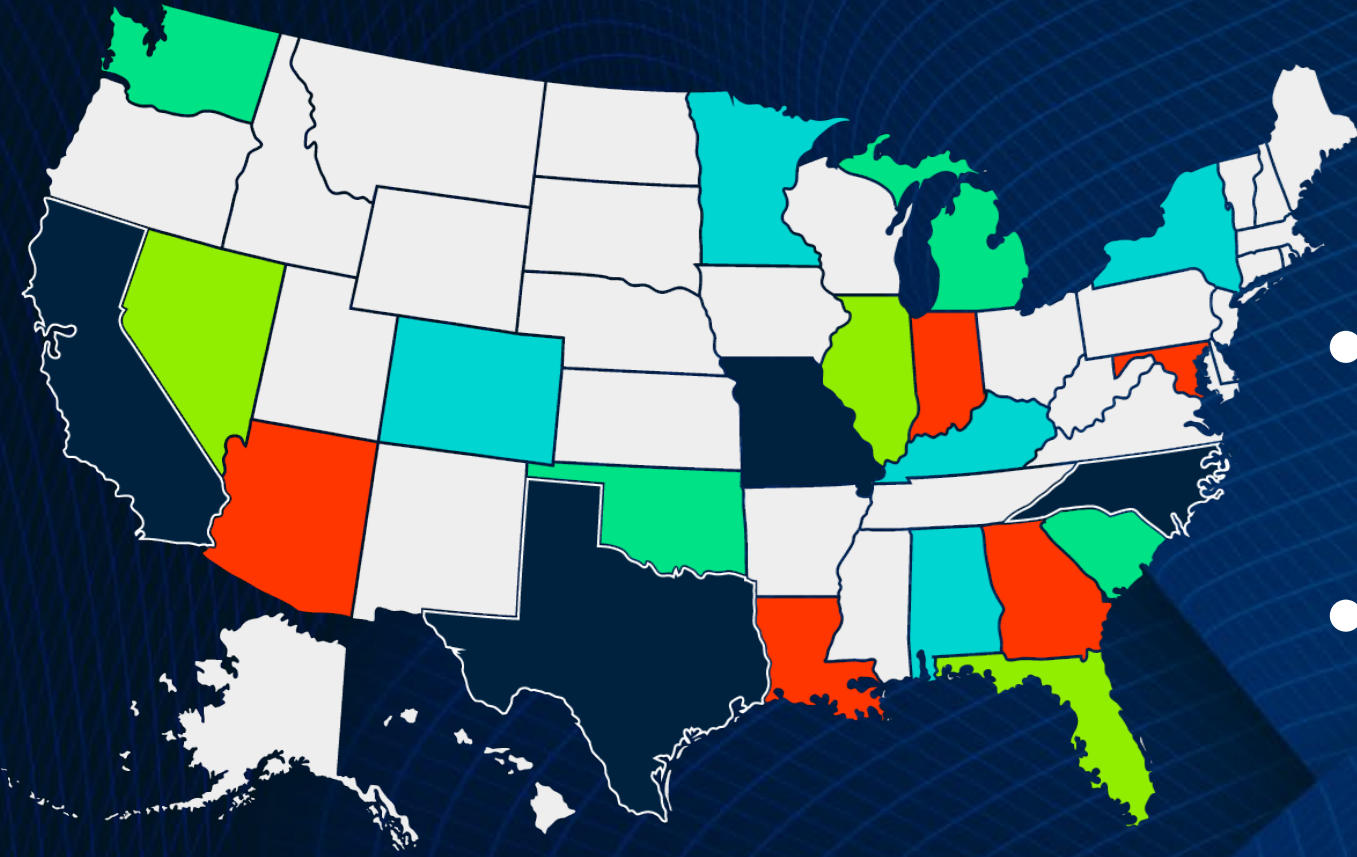


Benefits/Challenges



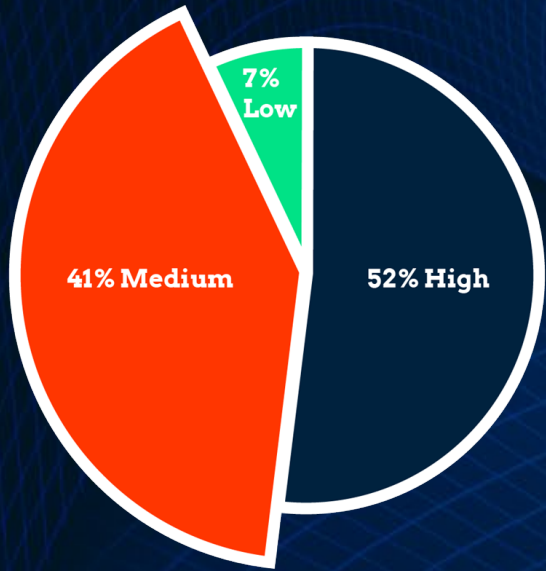
Overall Education

Summer 2023 Research Survey



- Over 60 utility executives and thought leaders were interviewed across the U.S.
- International literature review

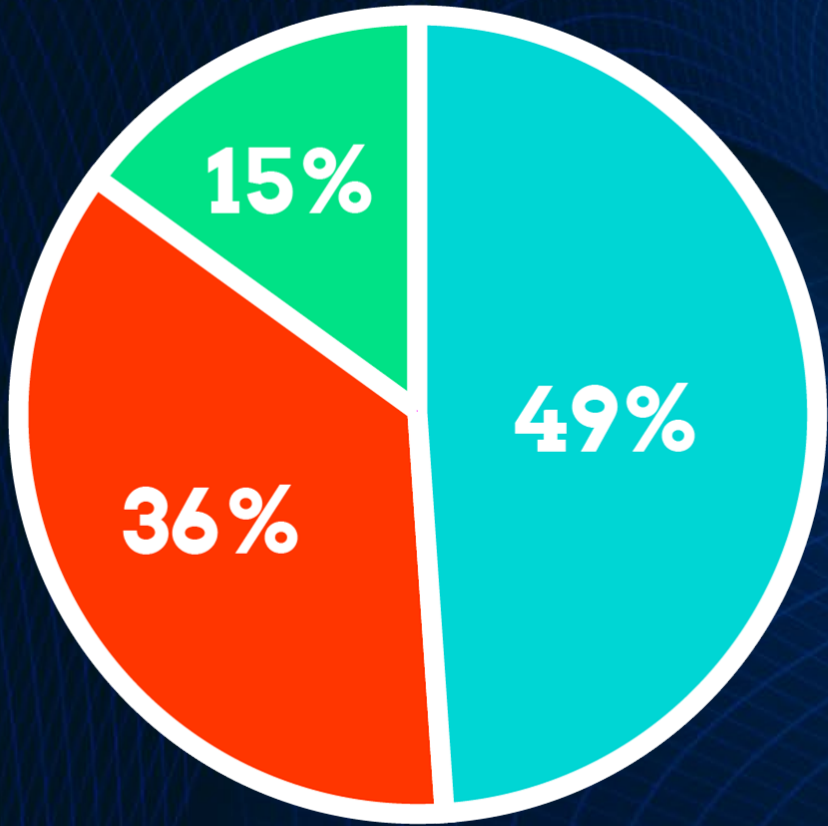
The importance of demand flexibility for the grid.
Perceived benefits of demand flexibility.
Not just grid resiliency, business resiliency.
A varied state of the value chain.
An opportunity to educate.



93% of utilities consider demand flexibility to be a medium to high priority for their organization for the next three years

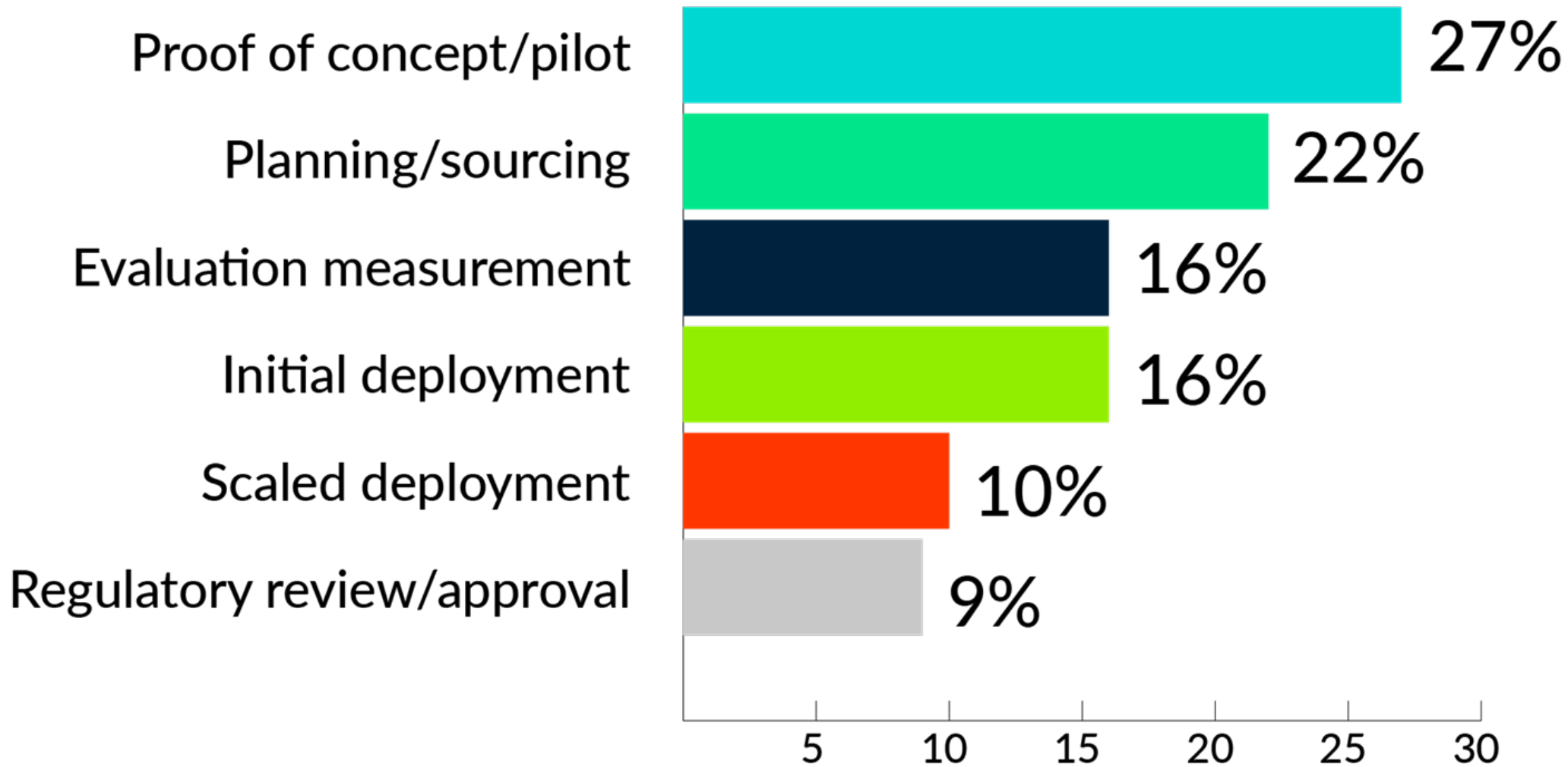
93%

- Utilities that plan on implenting demand flexibility programs within 3 years
- Utilities that have implement demand flexibility programs within the last 3 years
- Utilities that have no plan to implement demand flexibility programs



Pilots + Process

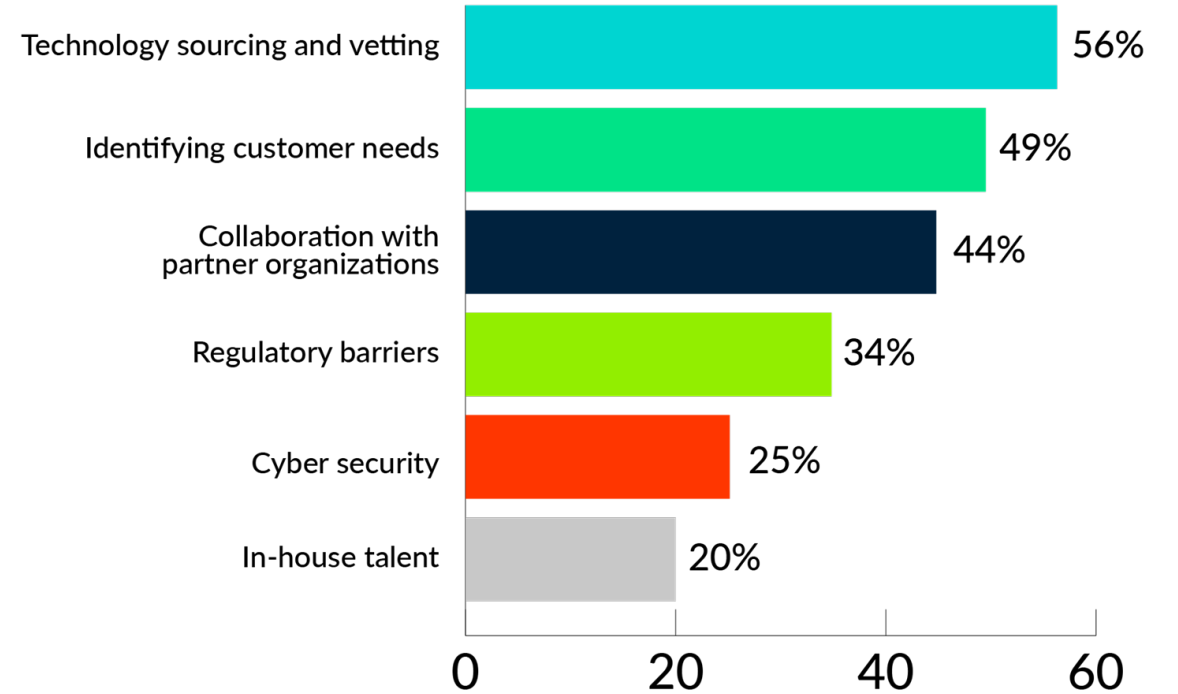
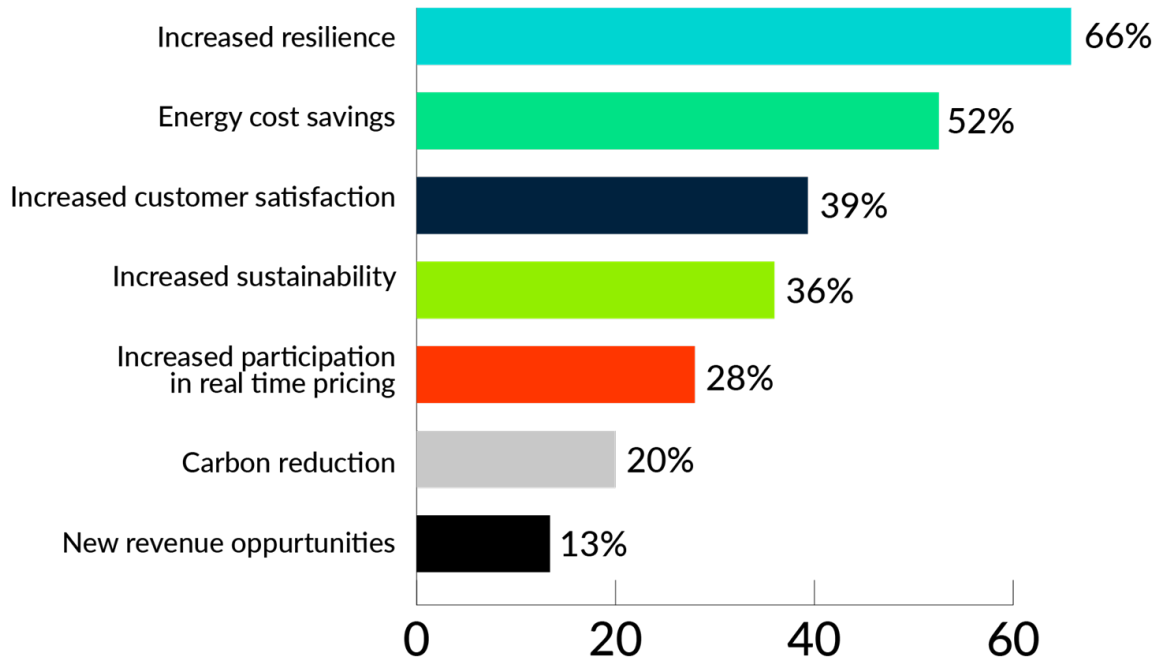
- **65% are actively engaging in deploying pilots**
- **35% are evaluating the opportunity and approach**
- **11% of respondents said they are not actively pursuing pilots at all**



Benefits



Challenges



So what do we need to solve for?

Technology

Regulatory

Human Understanding

What does it mean to be in a
productive, 2-way relationship
with our customers.

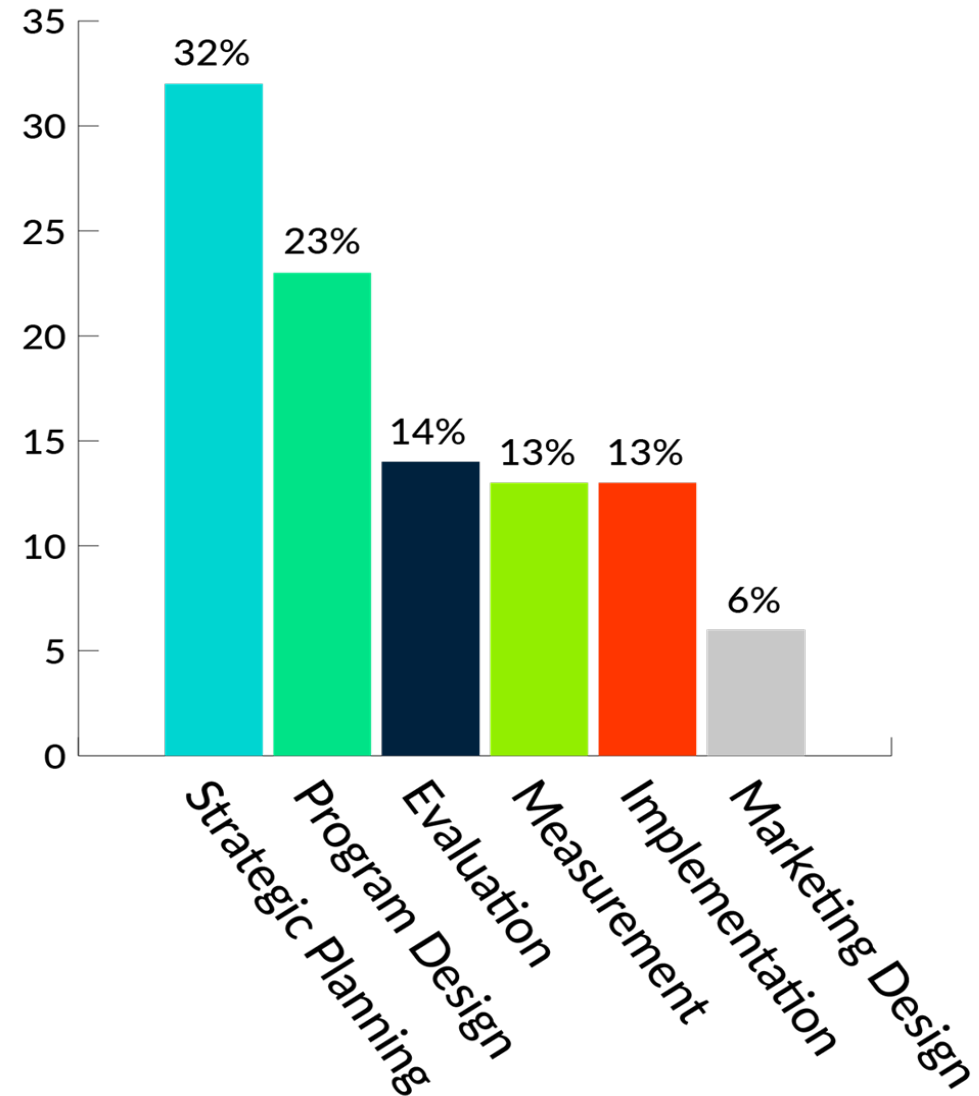
Not an existential threat, an opportunity.

Historically, the one shining example of a positive customer/utility relationship has been with electric vehicles, as compared to the relationships utilities and customers experienced with the advent of energy efficiency and solar.

Demand flexibility is our opportunity to redefine a relationship.

Areas of Focus on Demand Flexibility Programs

Most utilities are currently focused on planning, program design, and program implementation components



But if human relationships are the biggest challenge, why are we spending the least amount of time there?

Not just successful for some. Successful for all.

36%

We are Not Currently Pursuing
DEI Initiatives Within Our
Demand Flexibility Program

33%

Community Engagement
(surveys, interviews, etc.)

28%

Engagement with Community
Stakeholders and Organizations

23%

Internal Steering Committee(s)

21%

Appointed Internal DEI Specialist
to Assist with Program Design
and Implementation

20%

External Consultant to Assist
with Program Design and
Implementation

**What is the solution, if not
demand flexibility?**

Keep an eye out for the full
State of Demand Flexibility Report
launching February 2024



DOER/MAKER

