



Mindset Matters to who are you, what you do

- The real power in electricity
- Macro trends in energy
- Thoughts on efficiency culture

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May 8, 2012



Which one are you?



Where are you on this bell curve?



Fundamentally, efficiency is about...





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An aerial night view of the Earth, showing the continents of North America, South America, and parts of Europe and Africa. The landmasses are illuminated by a dense network of yellow and white lights, representing city lights and energy consumption. The oceans are dark, providing a stark contrast to the bright, glowing land. The overall scene conveys a sense of global activity and energy demand.

Worldwide, demand for energy is rising – as are costs and consequences

Global Trends

Climate change
requires that
environment -- not
least-cost – be the
lead standard for
energy

(Cleaner is better!)



Global Trends

Competitiveness
matters more,
especially as BRIC
economies rise



Global Trends

National Security
interests elevate the
import of domestic
sourcing of energy



The “culture” of oil





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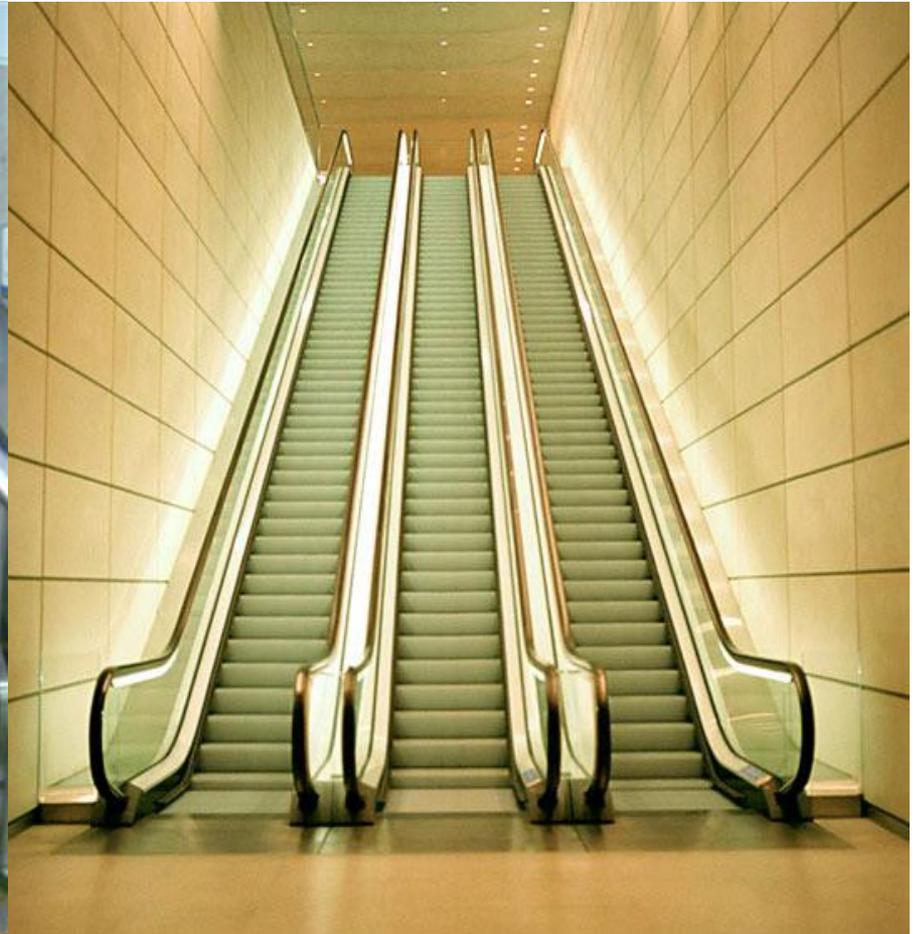
Then and now



Then and now



Then and now

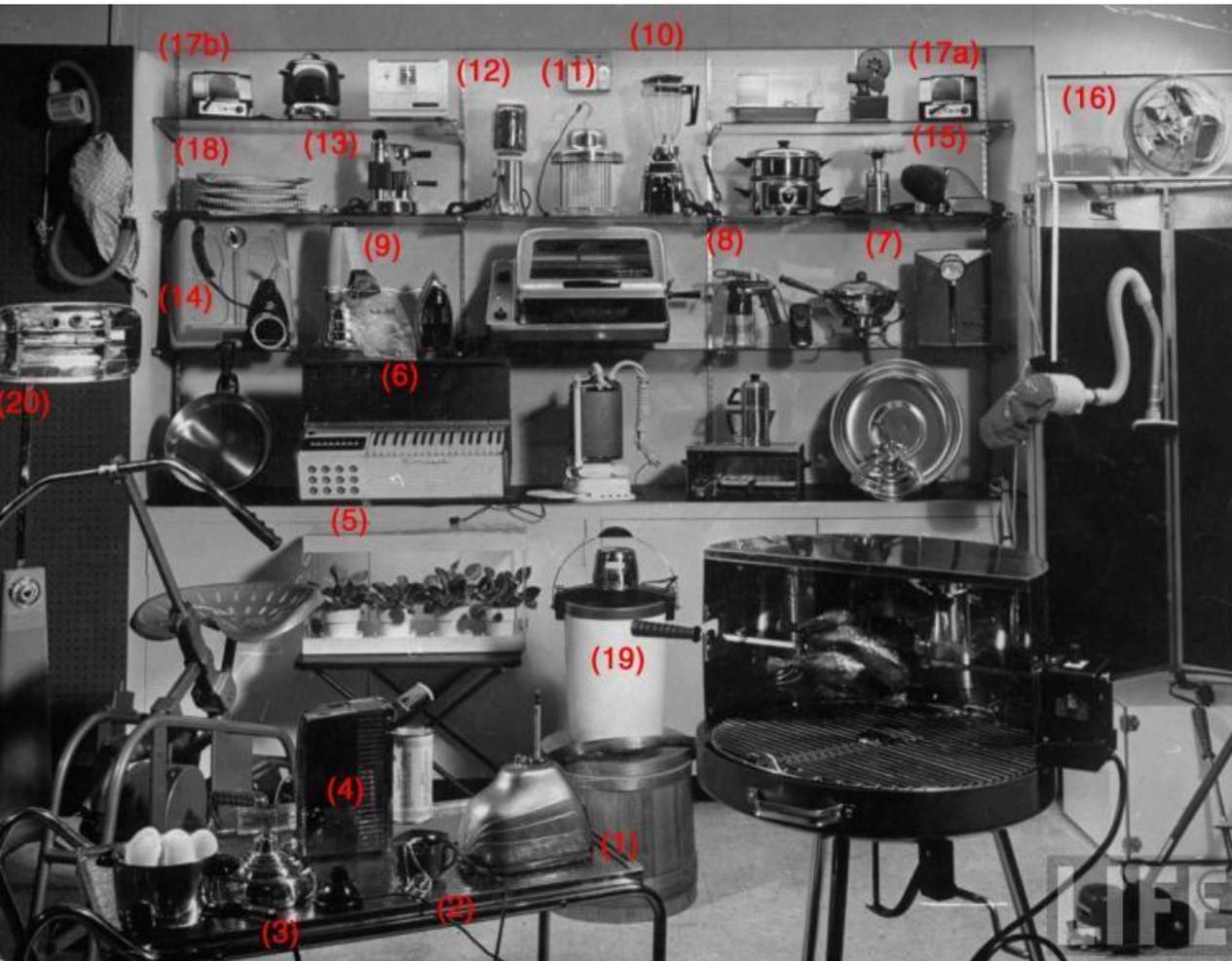


Then and now



LIFE Magazine, 1959

Powering convenience



- Pencil sharpener
- BBQ rotisserie
- Egg poacher
- Waring blender
- Slide projector
- UV "Gro-lite"
- Electric accordion
- Paint sprayer
- Ice crusher
- Coffee maker
- Shoe polisher
- Window fan
- Ice cream maker
- Home tanning light

The “hot” in your shower

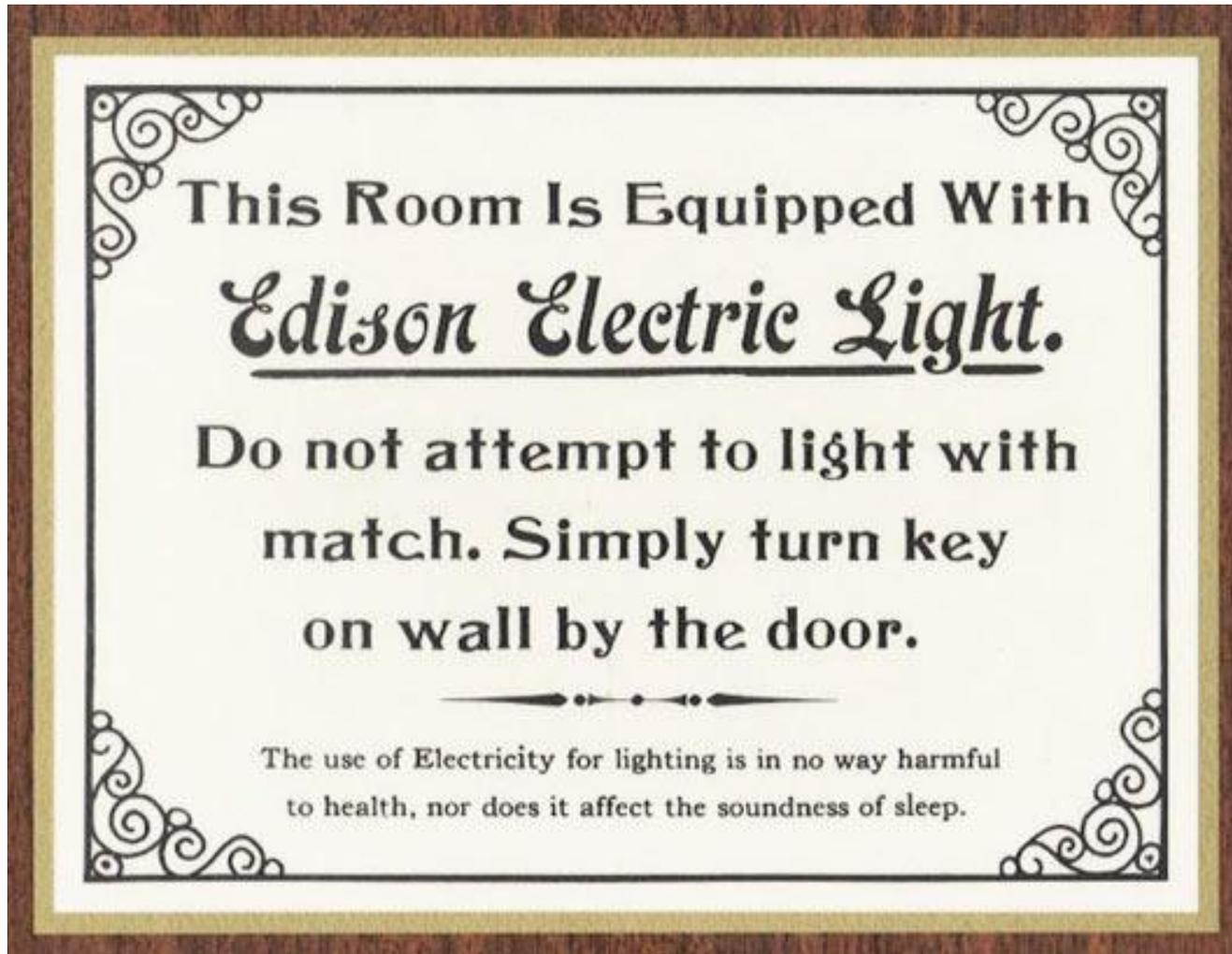


The “cold” in your beer

Light at the flip of a switch



Hard to imagine a time when...



After survival: Relief from work burdens



Late 1800s

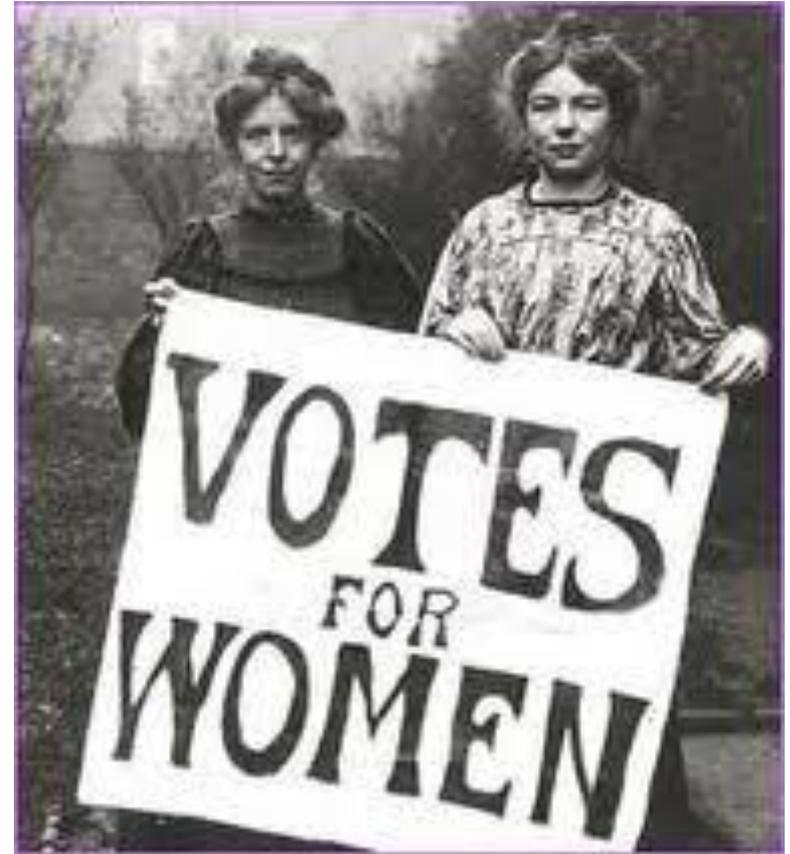


Early 1900s

After convenience, then...



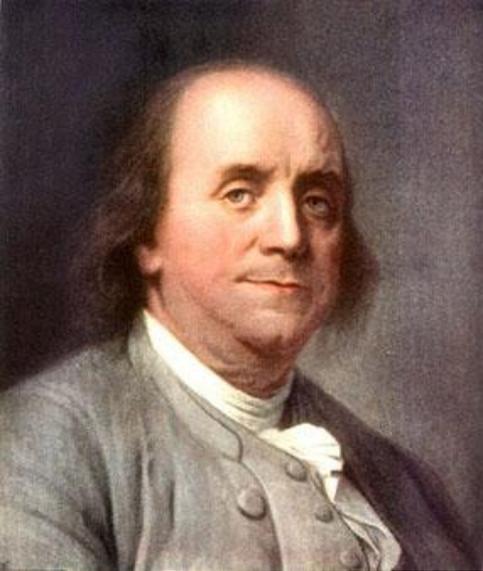
The *real* power in energy





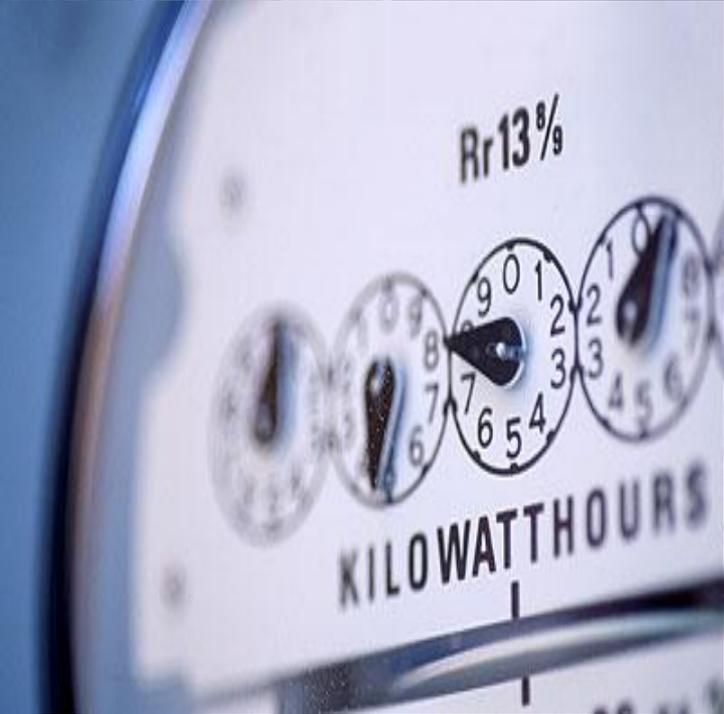
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DANGER

**ELECTRICAL EQUIPMENT
AUTHORIZED
PERSONNEL ONLY**

A triangular warning sign with a black border. Inside the triangle, there is a silhouette of a person being struck by a lightning bolt, indicating a high-voltage hazard.



Consumer dynamics

- Saving energy is important or very important. 72% yes
- I've completed a home energy efficiency renovation. 25% yes
- Most important reason to reduce consumption? 73% to lower bill
- How much would your energy bill have to go up to push you to spend more on efficiency upgrades?

| | 2007 | 2008 | 2009 |
|--------------|------|------|------|
| \$25-\$50/mo | 33% | 18% | 22% |
| > \$100/mo | 26% | 28% | 31% |

Revealing the Values of the New Energy Consumer

Accenture end-consumer observatory on
electricity management 2011

accenture

High performance. Delivered.



• Consulting • Technology • Outsourcing

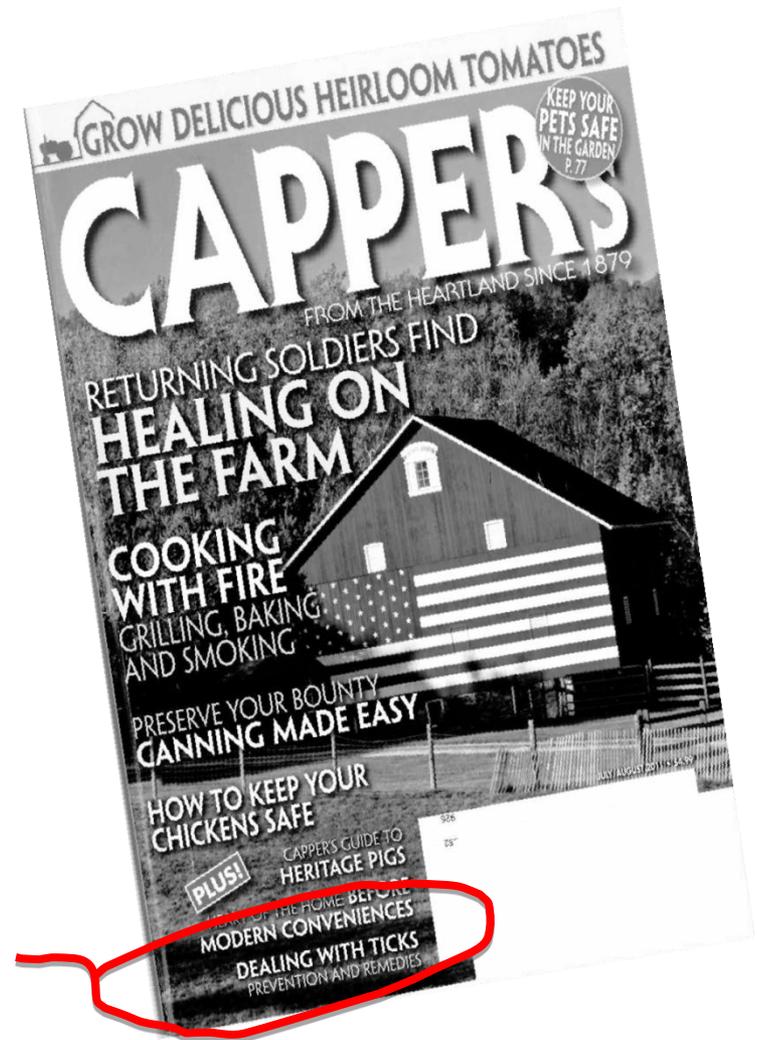
Key Finding No. 3

A wide array of consumer preferences
is driving the need for differentiated
propositions and experiences

Symbols of the past

“Times were tough before modern conveniences. I’m sure everyone agrees they would never want to go back to life without electricity, indoor plumbing and running water. I’m 80 now and... I love my washer and dryer, I thoroughly enjoy my microwave and don’t know what I would do with out my refrigerator...”

*Willowdean in
Tennessee*



So, if efficiency is about...



Which one are you?





Mindset Matters

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So, what will be different because you were here?