Mid-Size C&I Customers

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Who are Mid-Sized Customers

- Mid-sized customers are defined* as those with:
  - Electricity demand between 300 kW and 1,000 kW
  - Gas usage between 40 and 80 thousand therms per year
- In 2014**, these C&I customers represented:
  - 3,500 electric and 2,500 gas accounts
    - equivalent to 1.1% and 1.7%, respectively of all C&I accounts
  - 23% of all electric and 11 % of all gas usage
  - 29% of all electric and 7% of all gas lifetime savings
  - 9.3% of all electric and 6.6% of all gas participation
  - 24.3% of all electric and 14.2% of all gas incentives paid

NOTES:

* The data contained herein is derived from the 2011, 2012, 2013, and 2014 versions of the C&I Customer Profile Studies, was provided by DNV GL, and consists of statewide data for both electric and gas C&I customers.
** This is the same definition as used in the C&I Customer Profile studies

Mid-Sized Customer Examples

Office Building
78,000 Sqft

Hotel
165,000 Sqft

Elder Care Facility
215,000 Sqft

Youth Hockey Facility
80,000 Sqft

Mid-Sized Customer Needs / Considerations

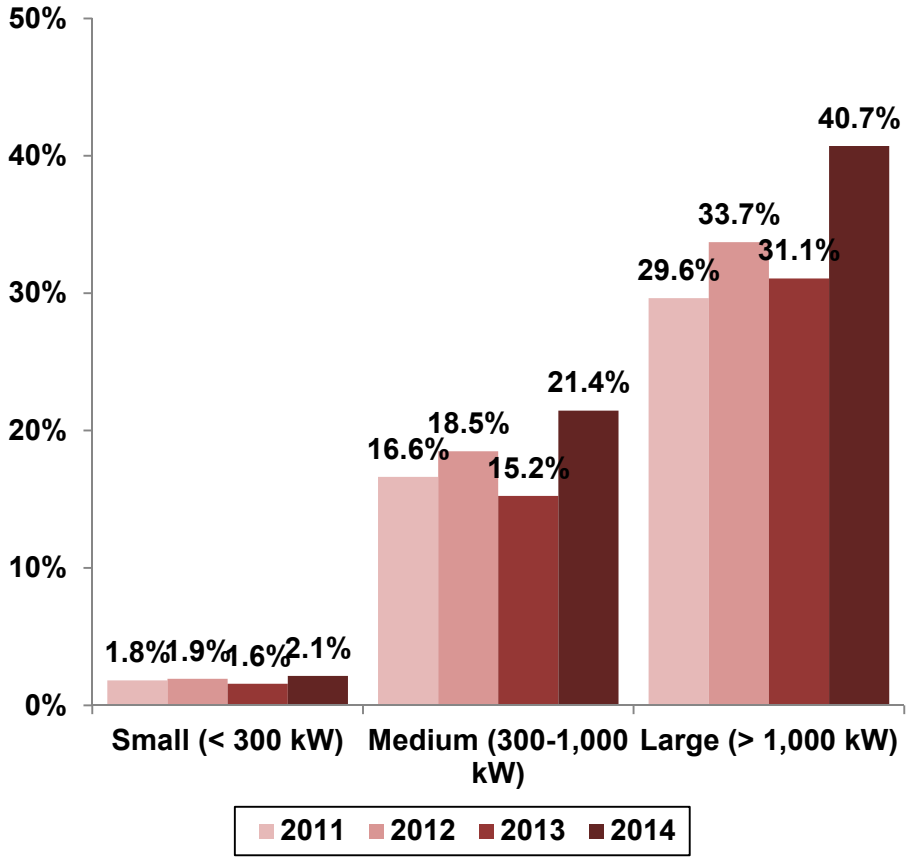
- Have more complex needs than small customers, but energy is not such a critical cost consideration as large customers.
- Need more comprehensive solutions but face a number of cash flow and technical constraints
- Requires a scalable approach given size of customer base

Serving Mid-Sized Customers

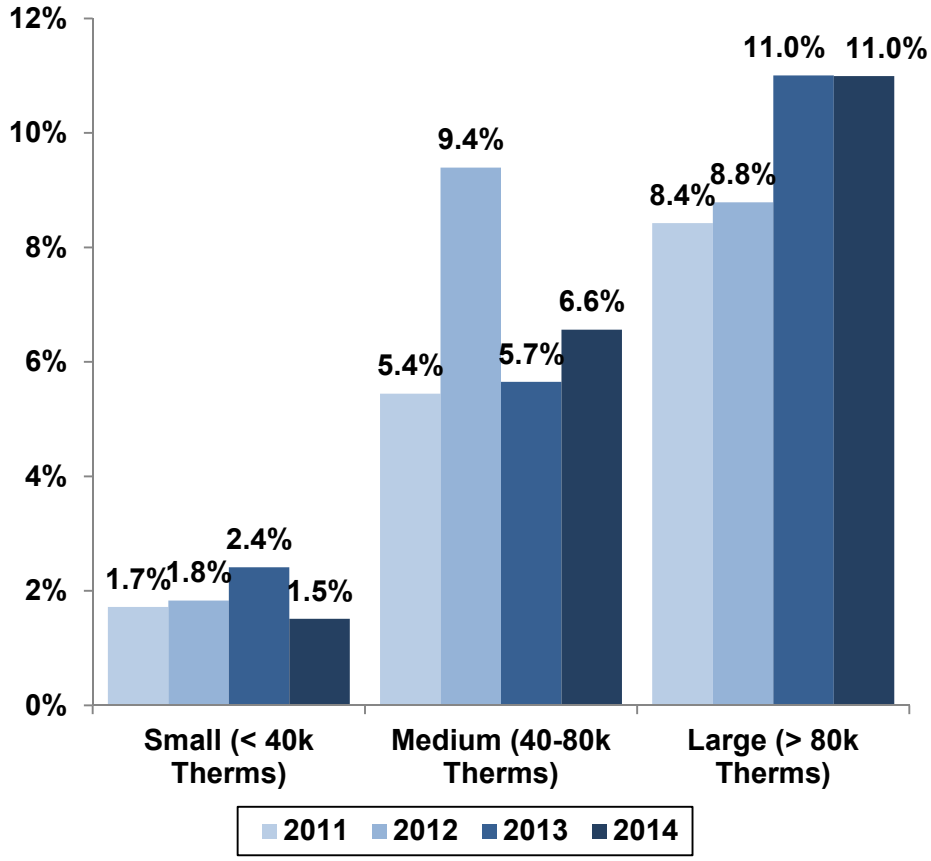
- Mid-sized customers are served via a wide array of Programs, Core Initiatives and approaches therein including:
  - Upstream
  - PA Organizational Approaches
    - e.g., Eversource segment teams, dedicated account management, other incremental specialist staff
  - Leverage Trade Ally Networks
    - Specialty vendors for smaller gas PAs
    - National Grid Channel Sales Group
  - Targeted Approaches
    - Industry segment specific
      - e.g., grocery, lodging, municipal, hospitality, CRE
      - Targeted marketing, specialized expertise, etc.
    - New construction
      - 20-100k SF buildings – dedicated team, modeling tools, etc.

% of Accounts Participating

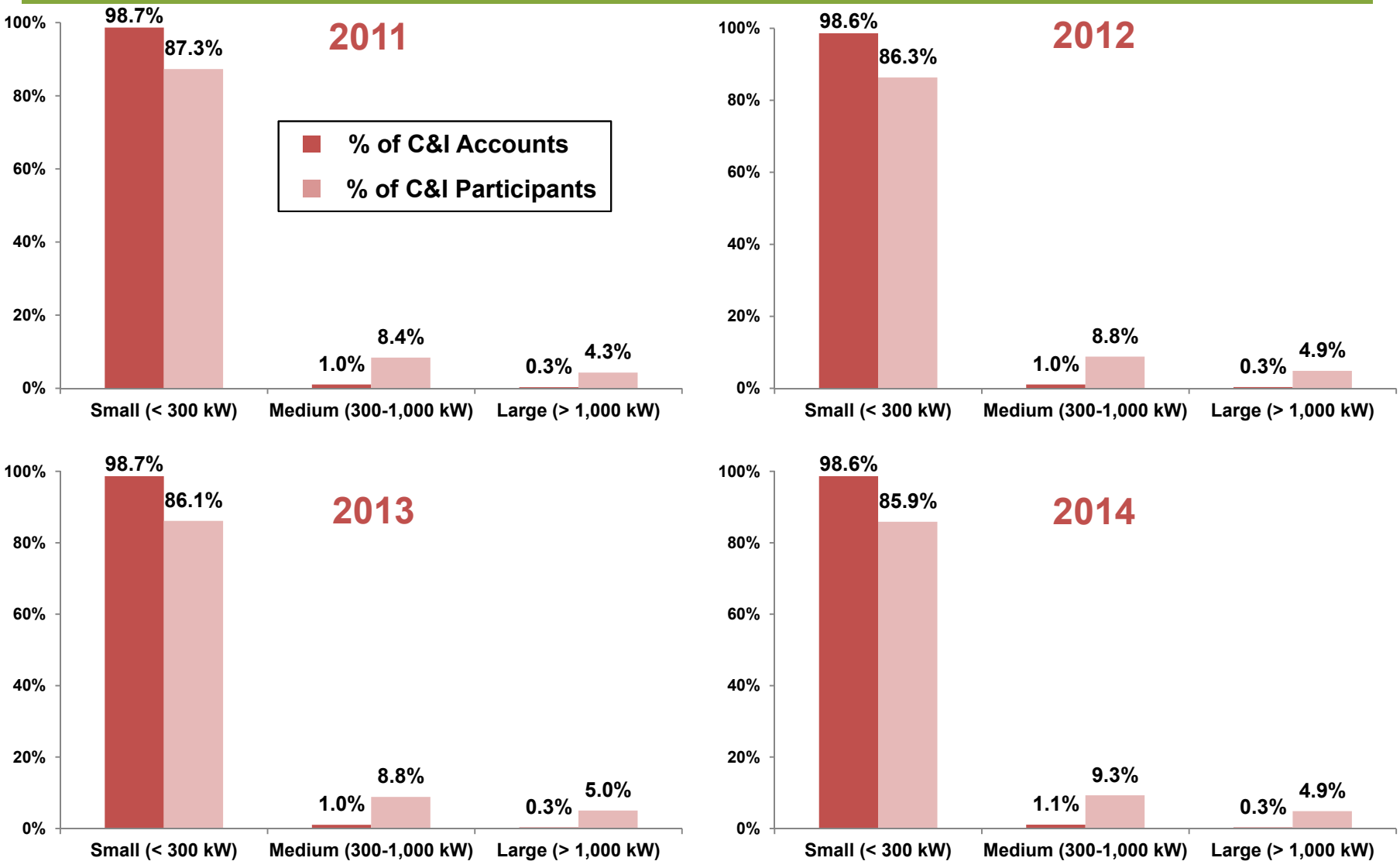
Electric



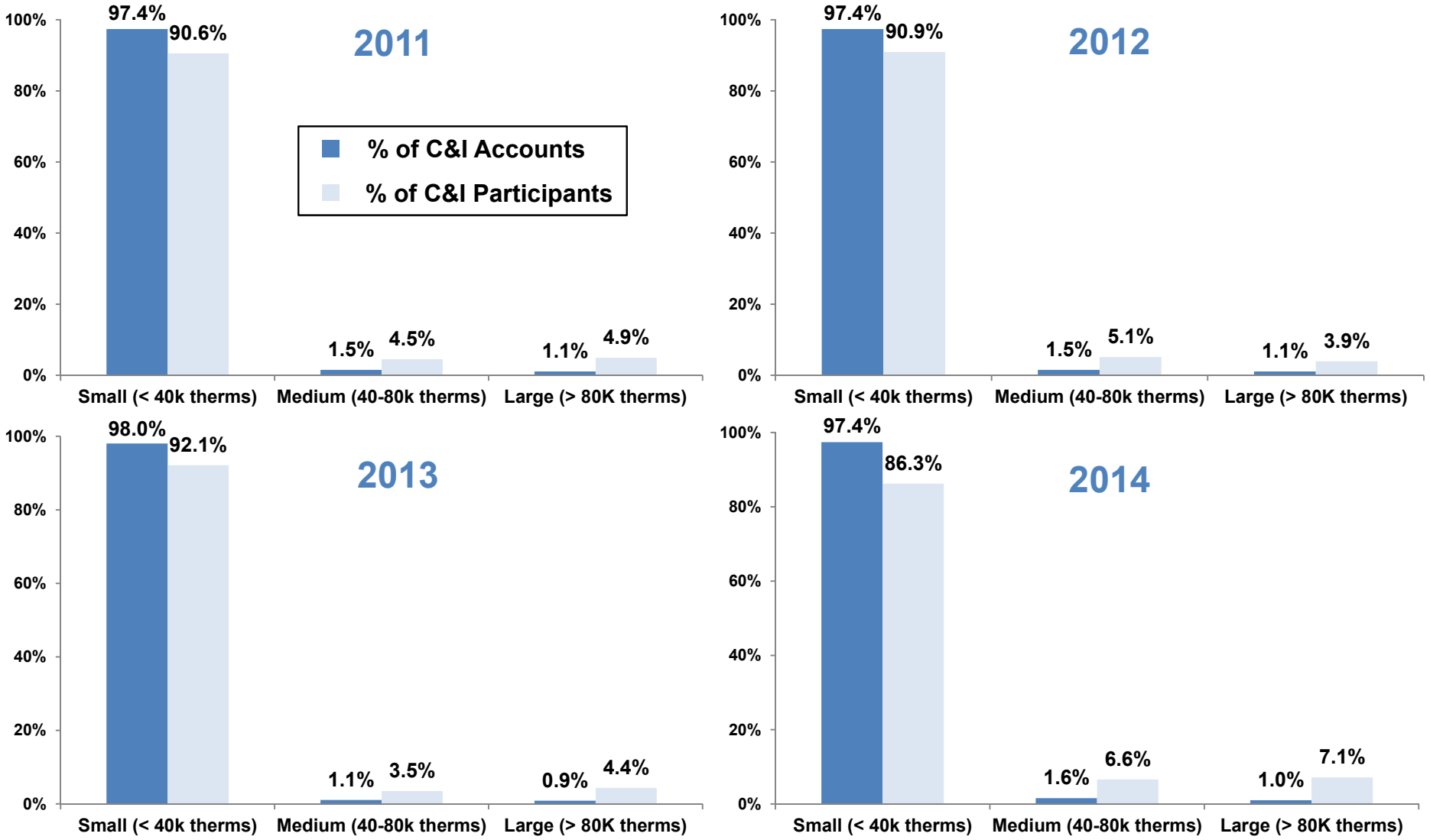
Gas



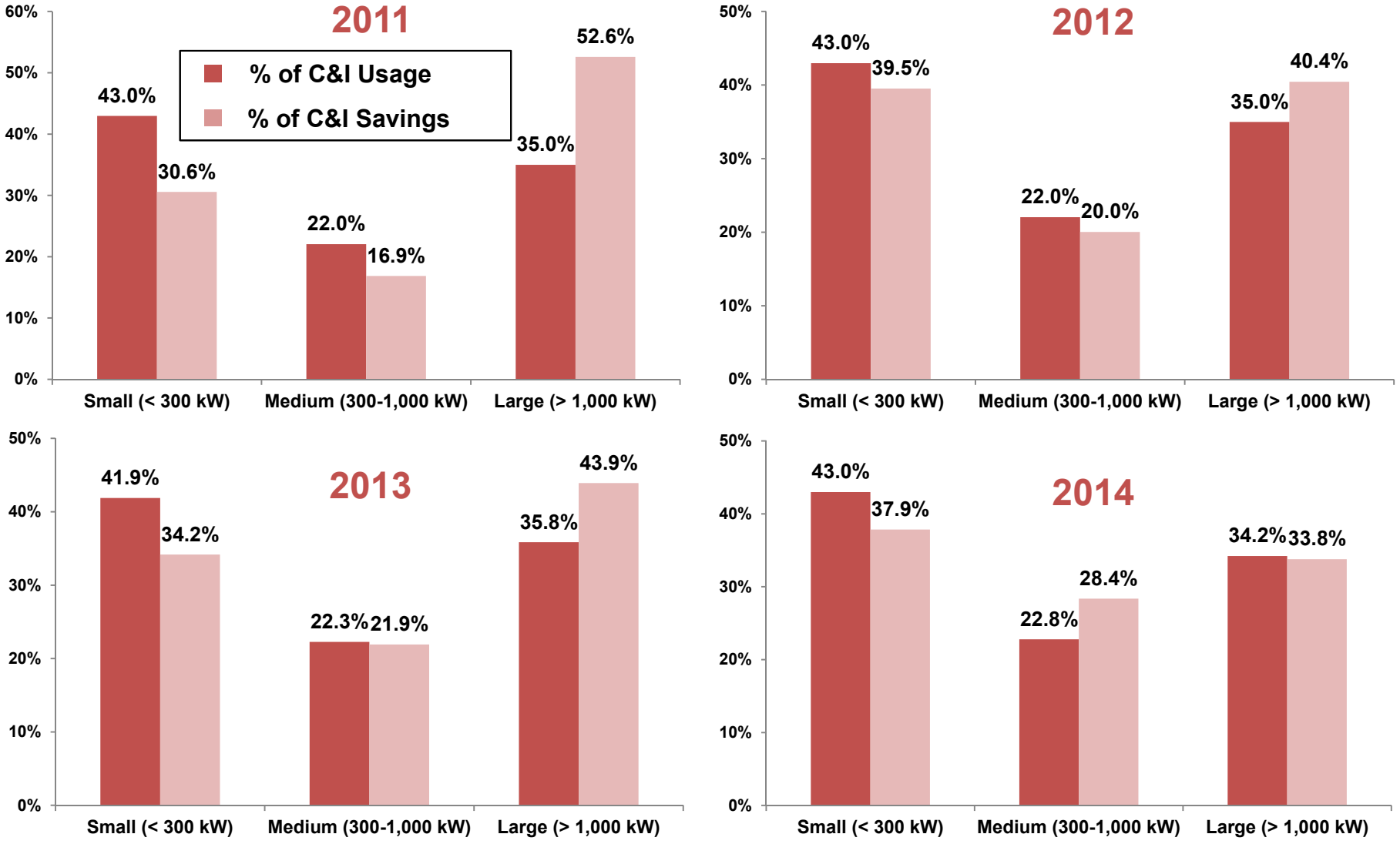
Participation Relative to Population: Electric



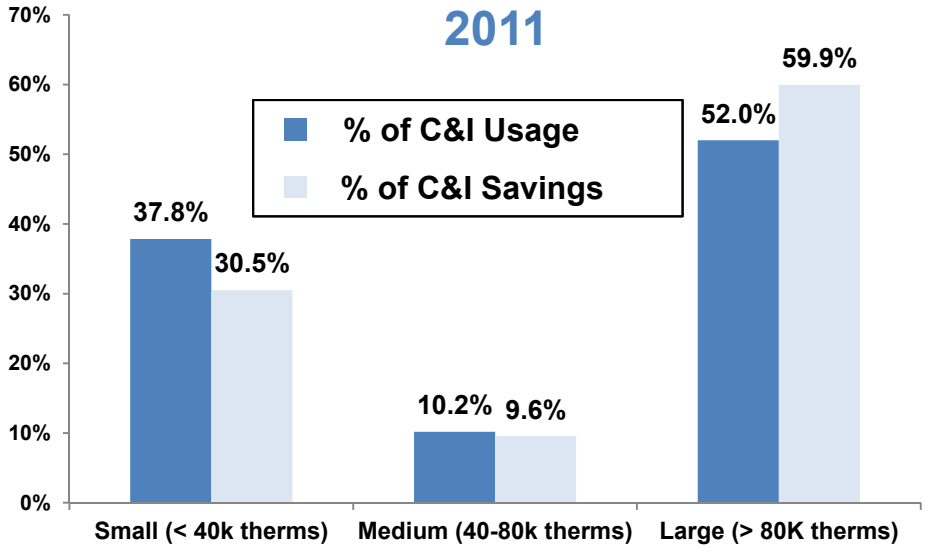
Participation Relative to Population: Gas

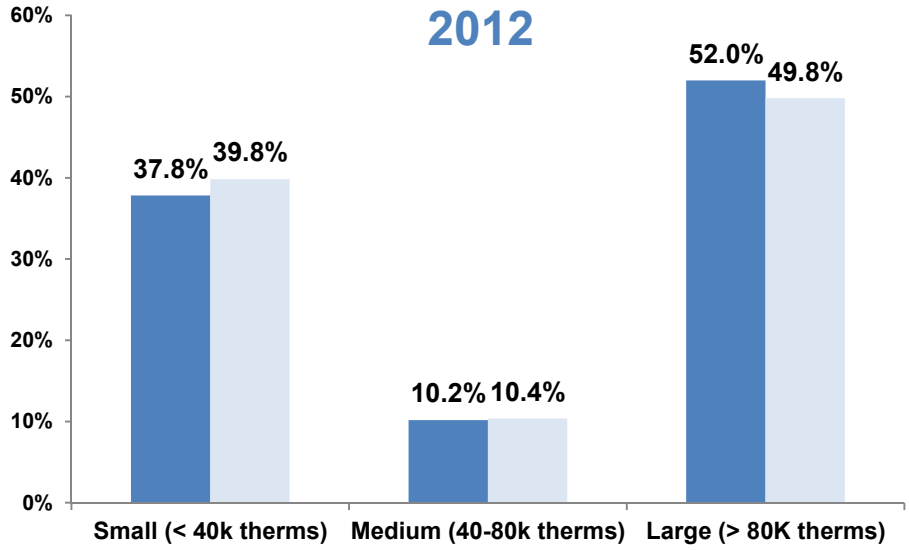


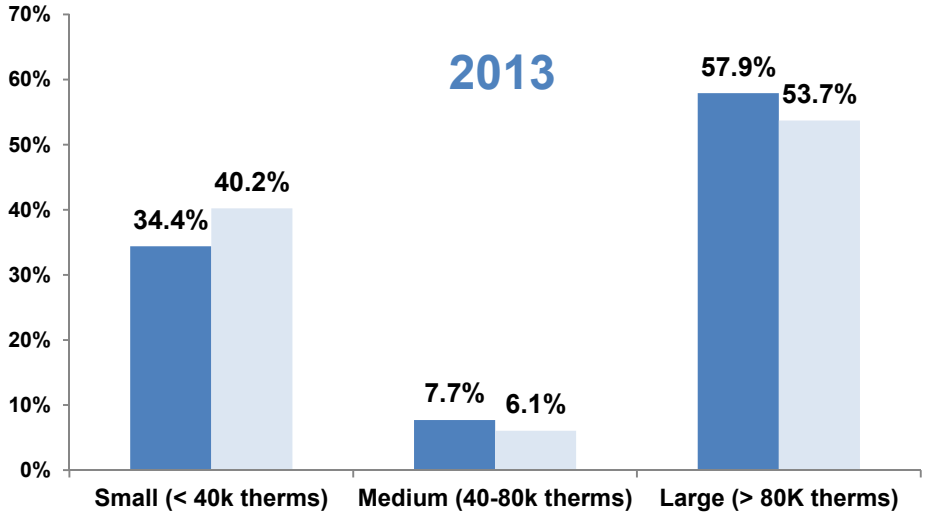
Savings Relative to Usage: Electric

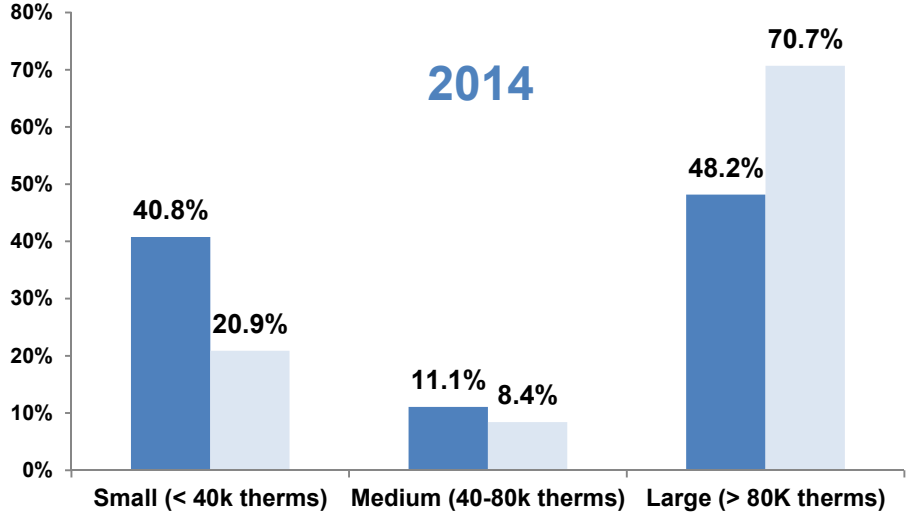


Savings Relative to Usage: Gas









Conclusion

- PAs have and continue to provide multiple approaches to serving mid-sized customers regardless of the segment they represent, the type of building they occupy, or the type of project they hope to undertake

- Based on the C&I Profile studies, mid-sized customers appear to have been well and equitably served relative to the counterparts in the small and large size cohorts during the period 2011 through 2014

- The PA's efforts to serve mid-size customers have increased considerably over the past few years and will continue to be expanded throughout the 2016-2018 Three-year Plan.

Thank You