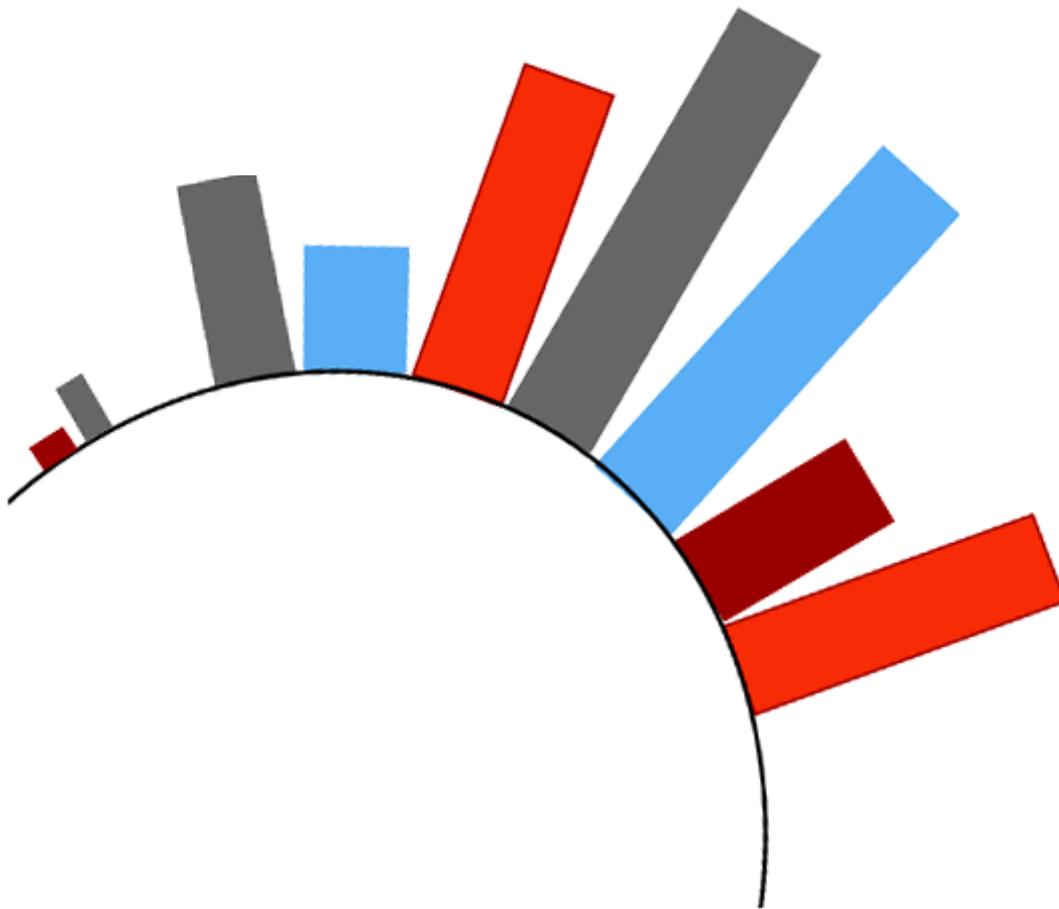


# AEE Survey of the Energy Industry 2012: Market Trends Survey



Relevant Trends,  
Opportunities,  
Projections &  
Resources

*Presented by:*



- Part I – Policy & Trends Summary
- Part II – Market Trends Survey Results
- Part III – AEE Education Programs
- Part IV – Training Opportunities

## Part I: Policy and Trends Summary

The 2012 Market Trends & Energy Policy Survey conducted by the Association of Energy Engineers (AEE) yielded some very interesting findings regarding the opinions of some of the energy industry's best and brightest with regard to US energy policy. When asked if they pay particular attention to a political candidate's stance on energy policy, 77% of AEE's energy professionals answered yes, and 80% of those professionals indicated that that candidate's stance would influence their decision for which candidate they would vote. On top of that, 97% of AEE's energy professionals pursue efforts to curb their personal energy use, with 94% installing energy efficiency measures in their home and 47% driving fuel-efficient vehicles. With regard to expanded offshore drilling in the Gulf of Mexico, 65% support President Obama's plan to expand drilling, while 65% oppose the President's decision against permitting the construction of the Keystone Pipeline in 2012. These are just a few of the highlights from the survey, please read the full report for more detail.

The Association of Energy Engineers (AEE), a nonprofit professional society of over 16,000 members, issued a survey to its members to determine the need for Green Jobs, Energy Industry Potential, Stimulus Results and Salary Data. The results represented are based on 2,775 responses and are outlined in this report. AEE was founded in 1977 and its mission is *"to promote the scientific and educational interests of those engaged in the energy industry and to foster action for sustainable development."*

### Profile of Respondents

- Eighty-five percent (85%) have graduated from a four-year accredited college.
- Forty-two percent (42%) have a post-graduate degree from an accredited college.
- Thirty-six percent (36%) are registered Professional Engineers (P.E.s) or Architects.
- Eighty percent (80%) are Certified in one or more of the following categories:

## Part II - Market Trends Survey Results

**Do you pay close attention to the position or stance that political candidates advocate with regard to energy policy?**

Yes	76.5%
No	23.5%

**Does that influence the way that you vote?**

Yes	79.3%
No	20.7%

**Do you personally pursue various efforts to curb your personal energy usage?**

Yes	96.7%
No	3.3%

**Which efforts do you personally pursue?**

Driving a fuel-efficient vehicle	46.4%
Driving an alternative-fuel vehicle (EV, biodiesel, natural gas, etc.)	5.1%
Taking public transportation	22.4%
Installing energy efficiency measures in your home	93.7%
Installing renewable energy technologies in your home (solar, geothermal, etc.)	16.1%
Recycling	85.2%

**Given recent discoveries of significant natural gas reserves in the United States, should utilities turn to natural gas as a baseload source of power?**

Yes	67.1%
No	32.9%

**Given recent discoveries of significant natural gas reserves in the United States, should the federal government incentivize the development of natural gas-powered vehicles?**

Yes	58.2%
No	41.8%

In his 2012 State of the Union Address before Congress, President Obama called for the implementation of a "clean energy standard" that would require that a larger portion of energy produced by utility companies be supplied by clean energy sources (eg. wind, solar, nuclear). Do you support the implementation of a clean energy standard?

Yes	72.8%
No	27.2%

President Obama has called for the development of 75% of potential offshore oil resources for drilling in the Alaska and the Gulf of Mexico. Do you support increased drilling for oil and natural gas in these regions?

Yes	65.1%
No	34.9%

President Obama recently announced that he would not permit the construction of the Keystone Pipeline. Do you support this decision?

Yes	34.7%
No	65.3%

Lawmakers are currently discussing making cuts to Department of Energy funding in order to reduce the US government's budget deficit. Do you feel that funding for the Department of Energy should:

Increase	32.8%
Decrease	30.0%
Stay the same	37.2%

Lawmakers are currently discussing making cuts to the Environmental Protection Agency's funding in order to reduce the US government's budget deficit. Do you feel that funding for the Environmental Protection Agency should:

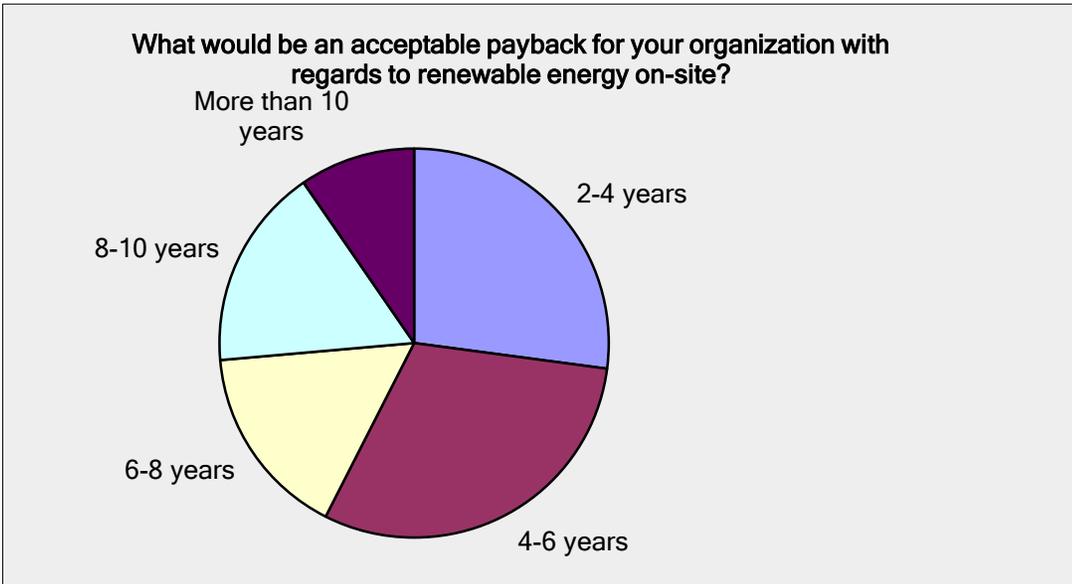
Increase	25.2%
Decrease	39.8%
Stay the same	35.0%

Has your company considered the installation of renewable technologies such as wind or solar at one of your facilities?

Yes	64.9%
No	35.1%

**What would be an acceptable payback for your organization with regards to renewable energy on-site?**

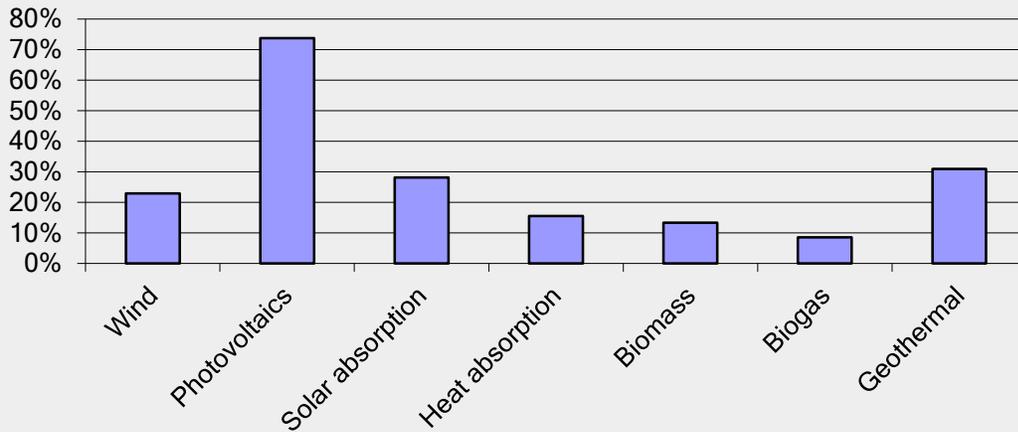
Answer Options	Response Percent
2-4 years	27.1%
4-6 years	30.4%
6-8 years	16.1%
8-10 years	16.8%
More than 10 years	9.6%



**Please indicate which technologies are most likely to be installed at your facilities within the next 3 years (check all that apply)**

Wind	22.9%
Photovoltaics	73.7%
Solar absorption	28.1%
Heat absorption	15.5%
Biomass	13.4%
Biogas	8.6%
Geothermal	31.0%

Please indicate which technologies are most likely to be installed at your facilities within the next 3 years (check all that apply)



If you are an end user, how has the availability of utility rebate programs for energy conservation or alternative projects changed in the last five years?

More available	53.6%
Less available	18.4%
No change in program availability	27.9%

If you are an end user, have you received utility rebate programs to support the implementation of energy conservation or alternative energy projects in the last five years?

Yes	59.9%
No	40.1%

**If you are an end user who has received utility rebates in the last year, what is the estimated amount of rebates?**

Less than \$100,000	67.4%
\$100,000 - \$250,000	15.8%
\$250,000 - \$500,000	8.3%
\$500,000 - \$1,000,000	3.6%
Over \$1,000,000	4.9%

**Does your company or governmental entity have an established policy concerning sustainability or sustainable development?**

Yes	58.8%
No	25.6%
In development	15.6%

**Does it identify a set of established goals associated with this policy?**

Yes	80.9%
No	19.1%

**If your company or governmental entity has an established policy concerning sustainability or sustainable development, check any of the components that are included in the policy:**

Safety programs	55.4%
Corporate Social Responsibility (CSR)	49.9%
Renewable energy	54.2%
Alternative energy	37.0%
Energy efficiency	87.4%
Environmental impacts	62.3%
Global warming	24.0%
Carbon management	51.4%
Land management	21.3%
Waste reduction and management planning	63.5%
Reporting of results to public	37.1%
Employee education	67.4%
Outreach	32.5%

**As a result of current or pending deregulation, it is**

Easier to get energy projects approved	19.1%
More difficult to get energy projects approved	18.8%
Approval of energy projects has not changed	62.1%

**How has your electric rate changed in the past year?**

Electric rate has increased	66.0%
Electric rate has decreased	13.0%
No change in electric rate	21.0%

**If your electric rate has changed, by how much has it changed?**

Increase of 1-5%	37.6%
Increase of 6-10%	30.5%
Increase of 11-15%	9.0%
Increase greater than 15%	8.7%
Decrease of 1-5%	7.2%
Decrease of 6-10%	4.1%
Decrease of 11-15%	1.4%
Decrease greater than 15%	1.6%

**How has your natural gas rate changed in the past year?**

Natural gas rate has increased	22.4%
Natural gas rate has decreased	46.6%
No change in natural gas rate	31.0%

**If your natural gas rate has changed, by how much has it changed?**

Increase of 1-5%	23.3%
Increase of 6-10%	15.7%
Increase of 11-15%	5.4%
Increase greater than 15%	3.4%
Decrease of 1-5%	19.3%
Decrease of 6-10%	14.9%
Decrease of 11-15%	6.0%
Decrease greater than 15%	11.9%

### Part III - AEE Education Programs

Earning an AEE certification credential has helped or will help my career?

Answer Options	Response Percent
Yes	83.1%
No	16.9%

Earning an AEE certification has benefited or will benefit my firm?

Answer Options	Response Percent
Yes	82.4%
No	17.6%

Earning an AEE certification has given my firm a competitive edge in respect to requests for proposals?

Answer Options	Response Percent
Yes	57.1%
No	42.9%

## Part IV: Training Opportunities

The Association of Energy Engineers offers a variety of professional training and re-training programs, including:

- Training seminars, conferences, and industry networking (energy, sustainability, energy auditing, power, green facilities, certification programs)
  - <http://www.aeecenter.org/realtime> (Online training seminars)
  - <https://www.aeecenter.org/seminars/calendar.htm> (Live seminar training)
  - <http://www.aeecenter.org/shows> (energy industr

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