



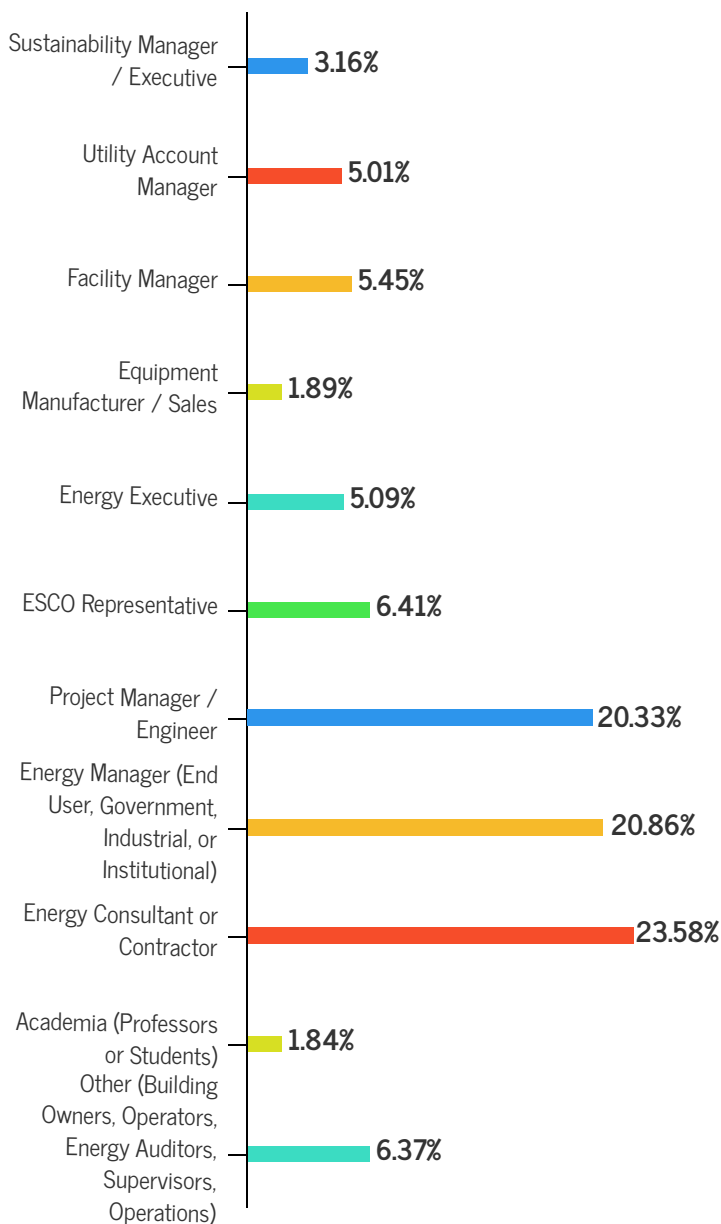
2018 Market Trends Report

The Association of Energy Engineers, a nonprofit global professional society of over 18,000 members, issues an annual survey to determine the need for energy efficiency jobs, energy industry potential, and salary data. The results are based on more than 2400 responses and 78 countries represented.

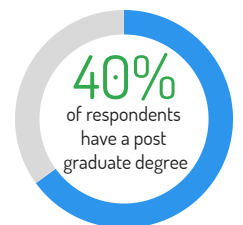
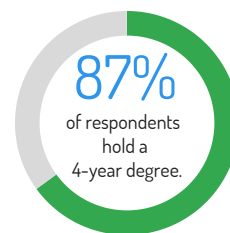
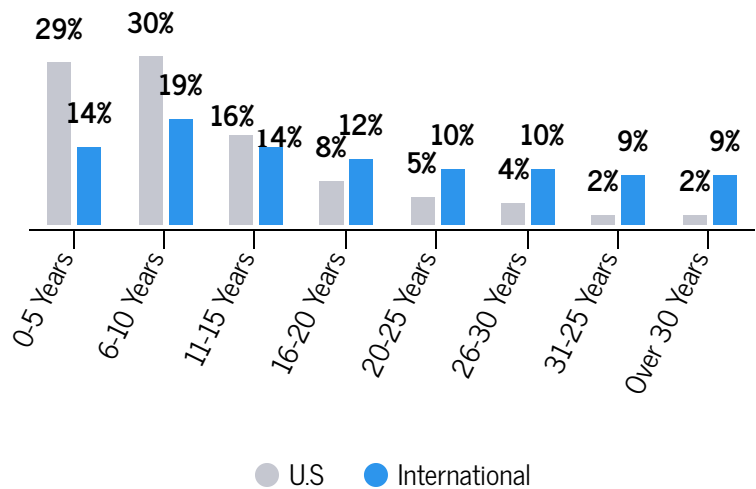
AEE was founded in 1977 and its mission is “to promote the scientific and educational interests of those engaged in the energy industry and to foster action for Sustainable Development.”

The Association of Energy Engineer’s member survey shows that 20% of energy professionals surveyed plan to retire within the next 5 years and 20% within the next 10 years. This means close to 40% of the energy professionals surveyed are planning to leave the energy workforce before 2030.

Respondents Role in Organization



Years of Energy Efficiency Experience



96% OF RESPONDENTS HOLD AN AEE CERTIFICATION

2017 Market Trends Report

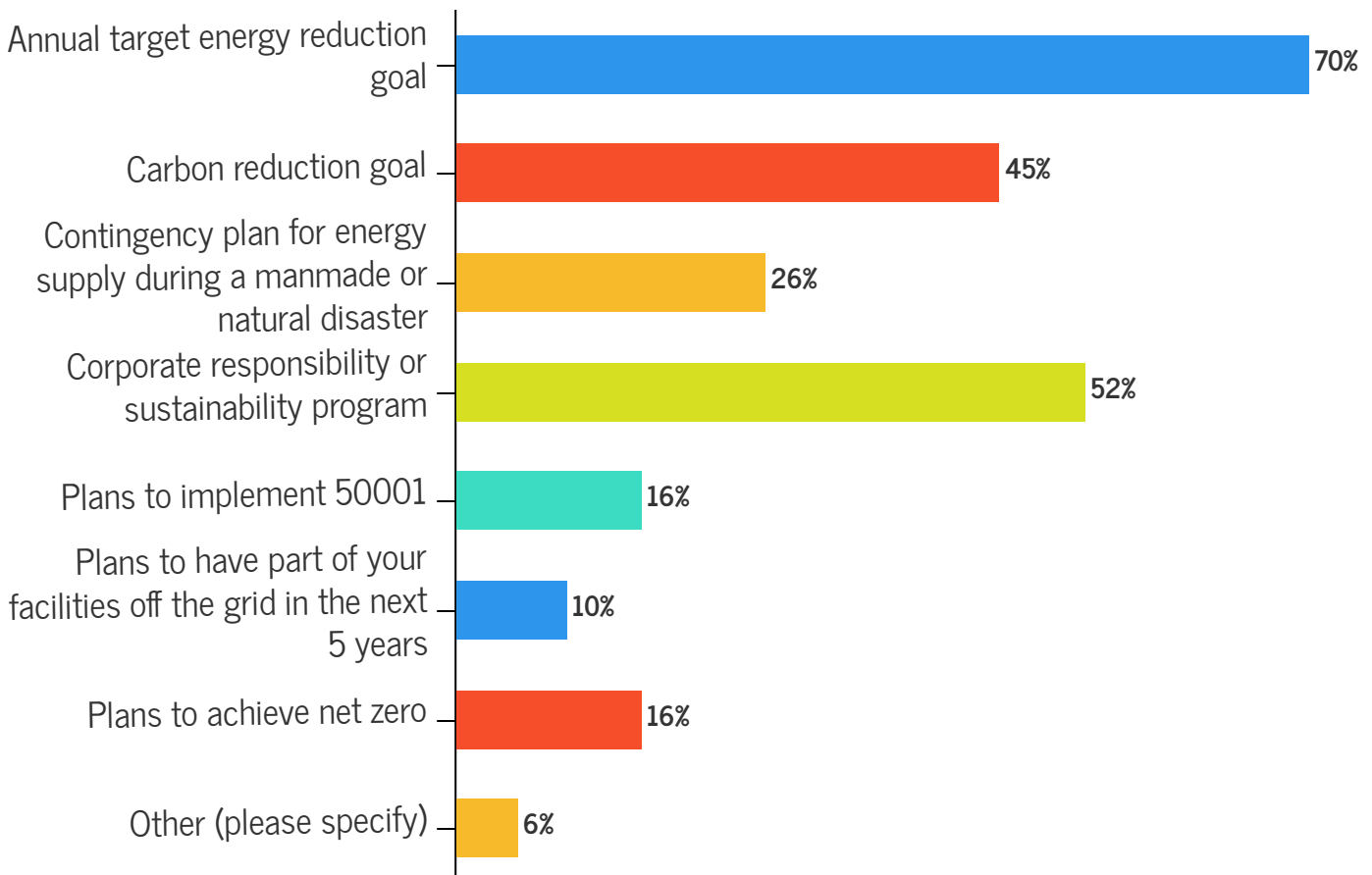
80%

OF RESPONDENTS
MAKE OR INFLUENCE THEIR
ORGANIZATION'S ENERGY
EFFICIENCY DECISIONS

77% of respondents say that budget and/or funding restraints is the most significant challenge to increasing energy efficiency and sustainability

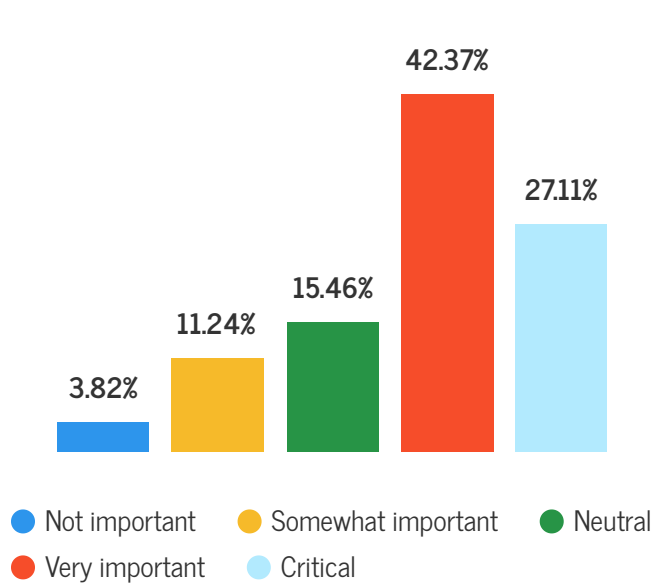
38% of respondents say that management approval is the most significant challenge to increasing energy efficiency and sustainability

Does your organization have any of the following plans/goals?

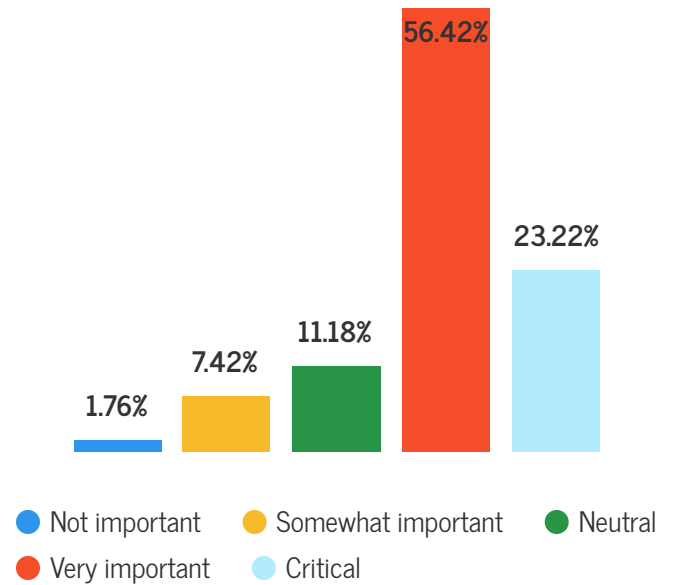


Respondents were asked to rate mega trends shaping the energy industry.

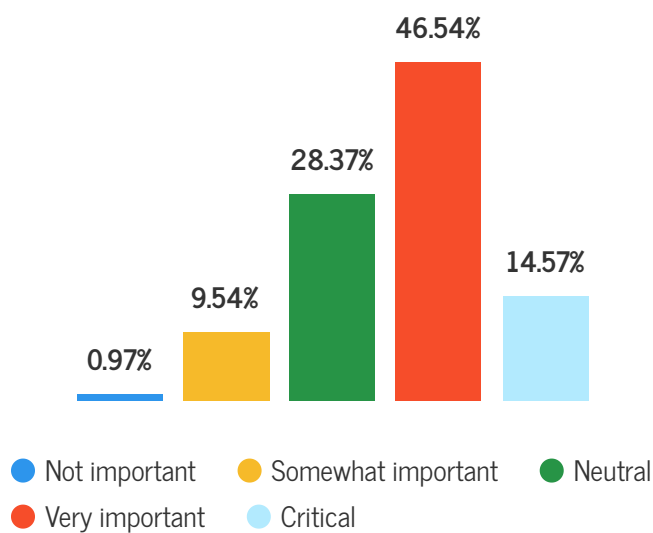
Climate Change and Global Warming



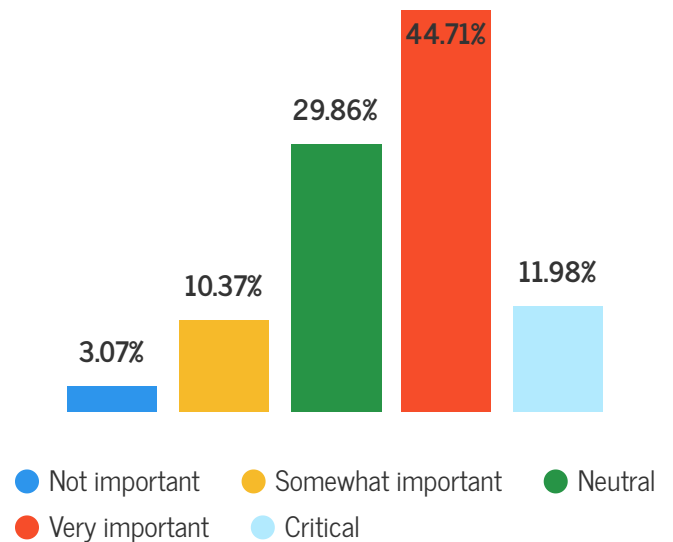
Competitive Cost of Renewable Energy



Data Analytics & IoT



Distributed Generation & Microgrids



Mega trends continue on next page →

Respondents were asked to rate mega trends shaping the energy industry.

Mega Trend Highlights

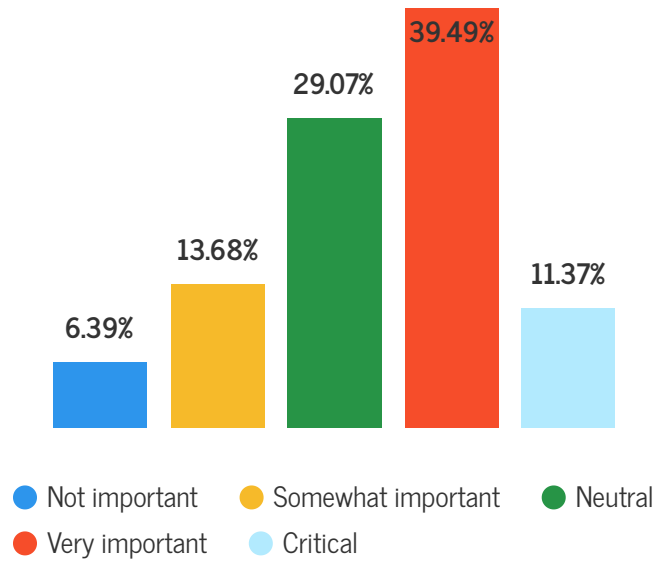
Critical

- Climate Change & Global Warming
- Energy Storage
- Energy Resiliency

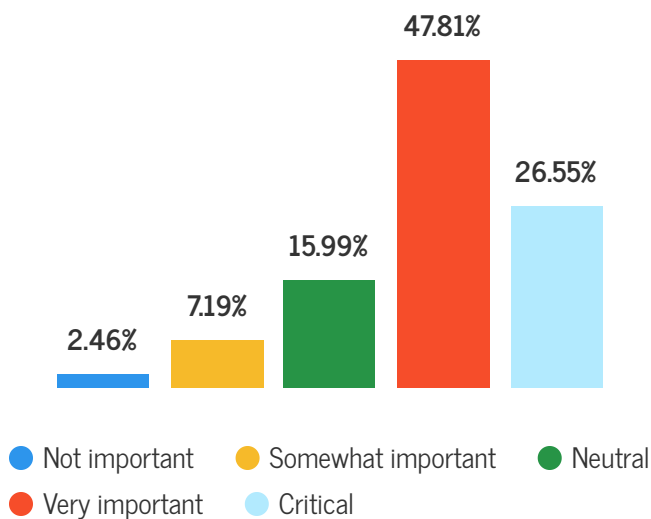
Very Important

- Competitive Cost of Renewables
- Data Analytics & IoT
- Distributed Generation & Microgrids

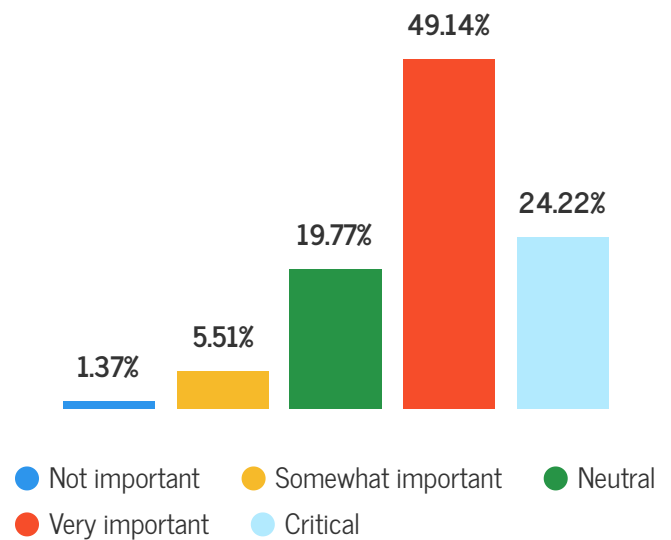
Electric Vehicles & Required Infrastructure



Energy Storage

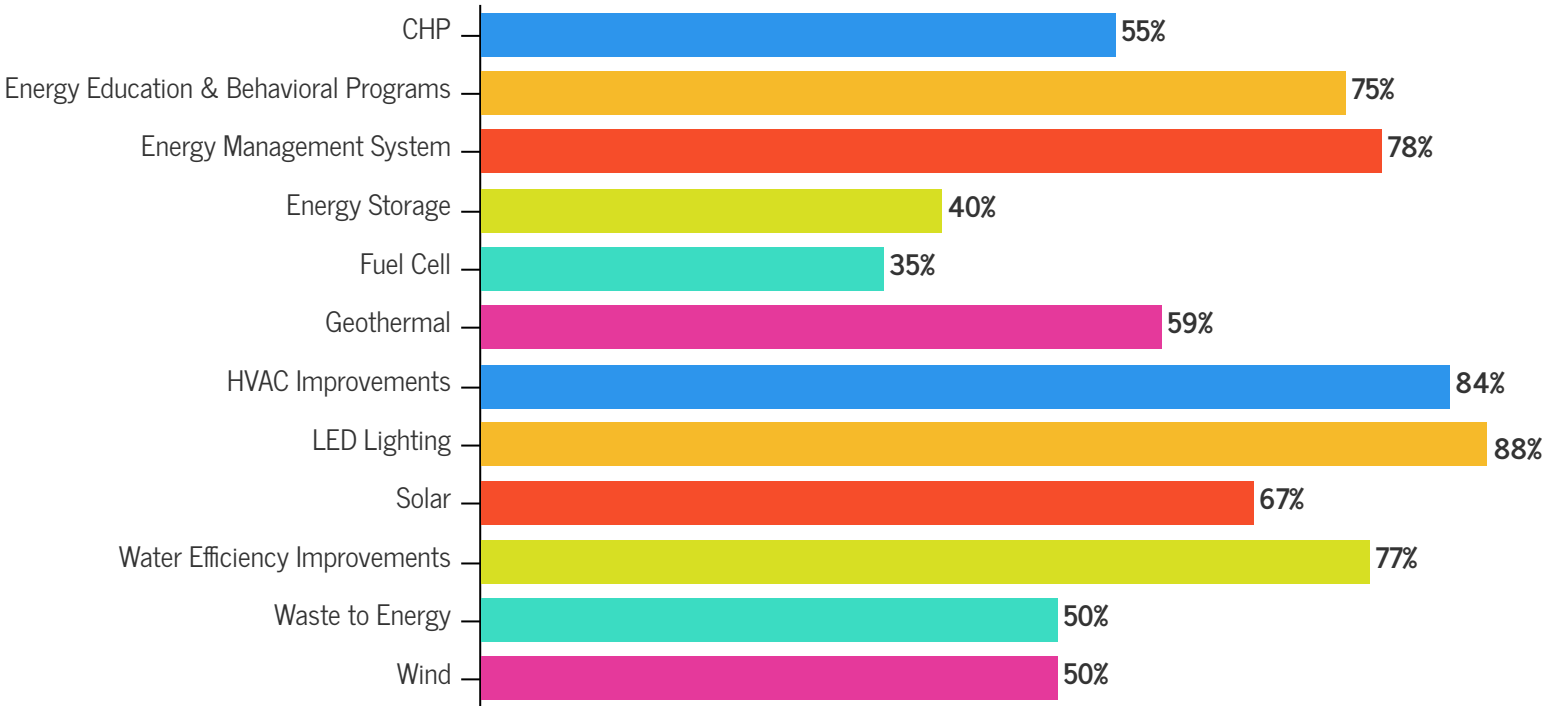


Energy Resiliency

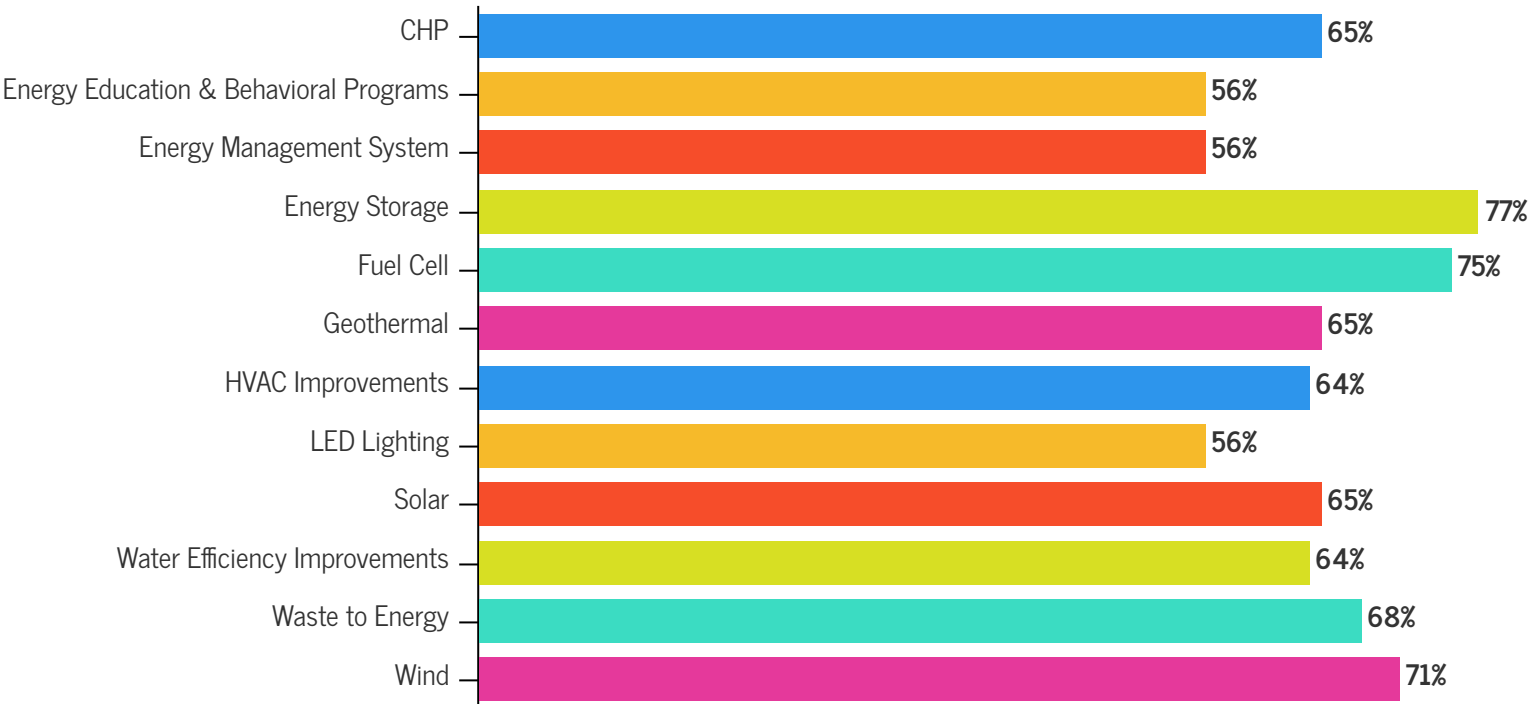


Respondents were asked which technologies were installed at their facilities in 2017 and which they plan to install in 2018.

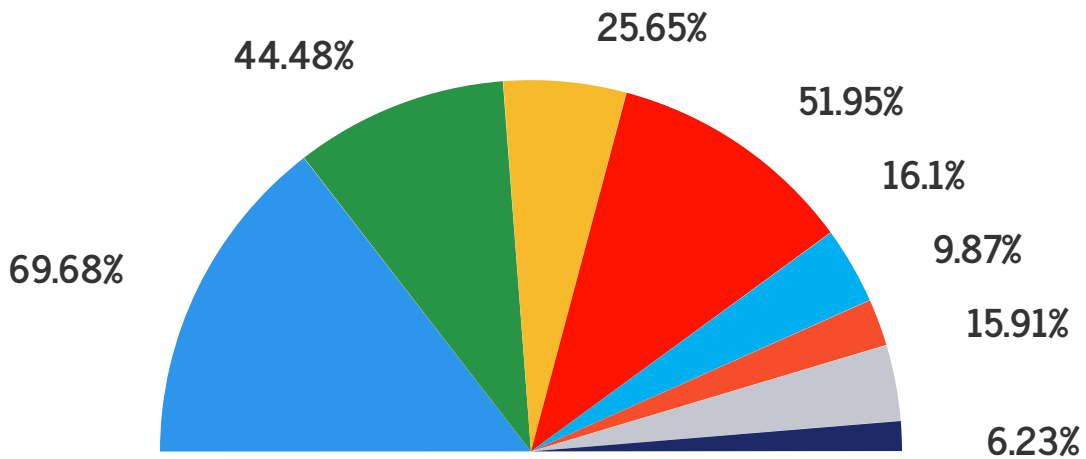
Technologies Installed in 2017



Technologies Planning to Install in 2018

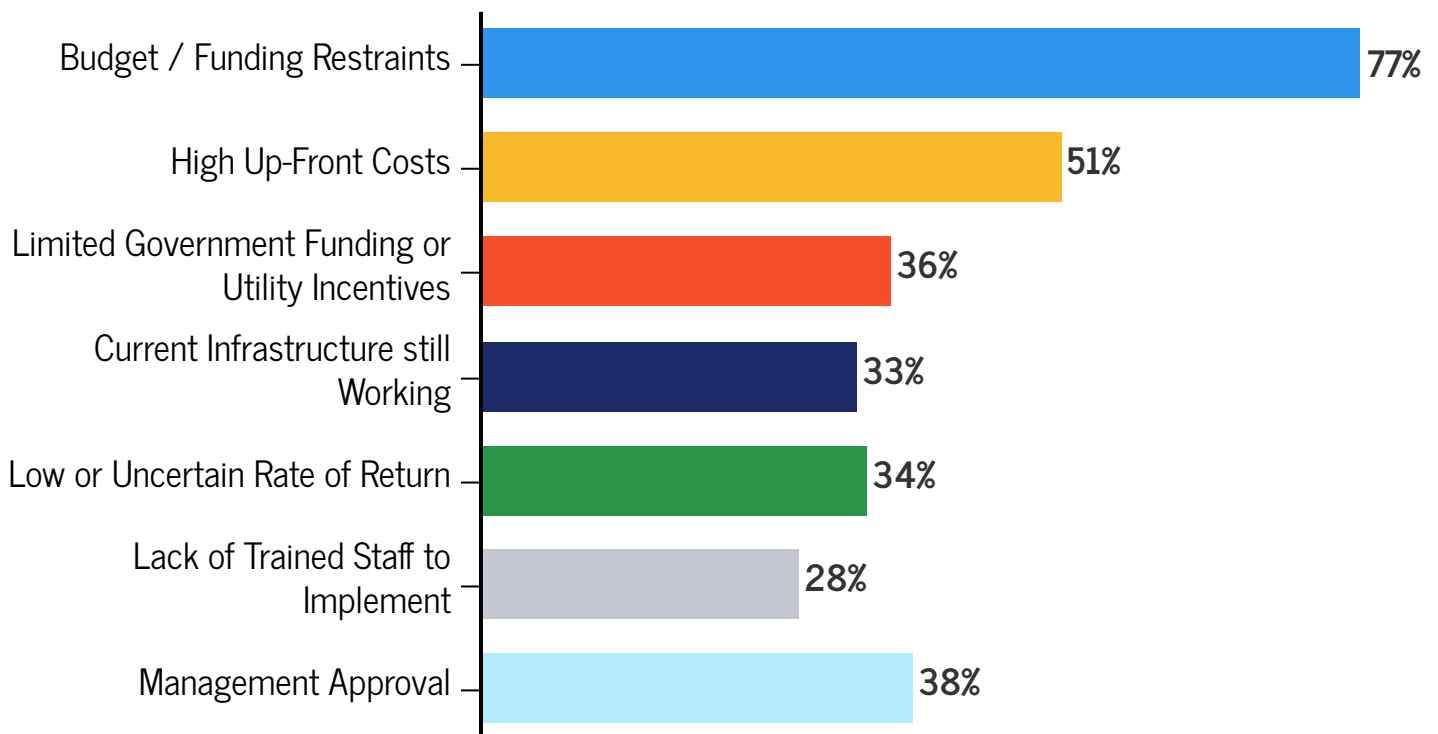


Does your organization have any of the following plans/goals?

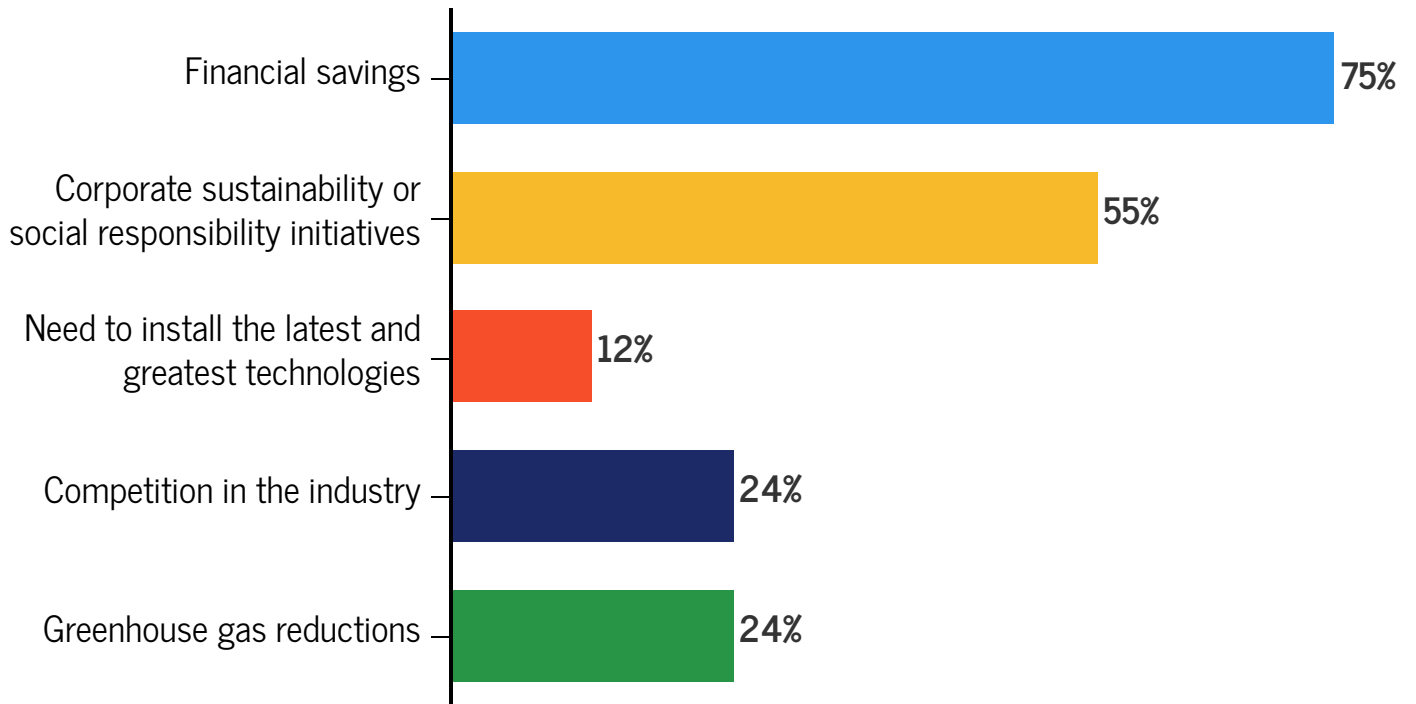


- Annual target energy reduction goal ● Carbon reduction goal
- Contingency plan for energy supply during a manmade or natural disaster
- Corporate responsibility or sustainability program ● Plans to implement 50001
- Plans to have part of your facilities off the grid in the next 5 years ● Plans to achieve net zero
- Other (please specify)

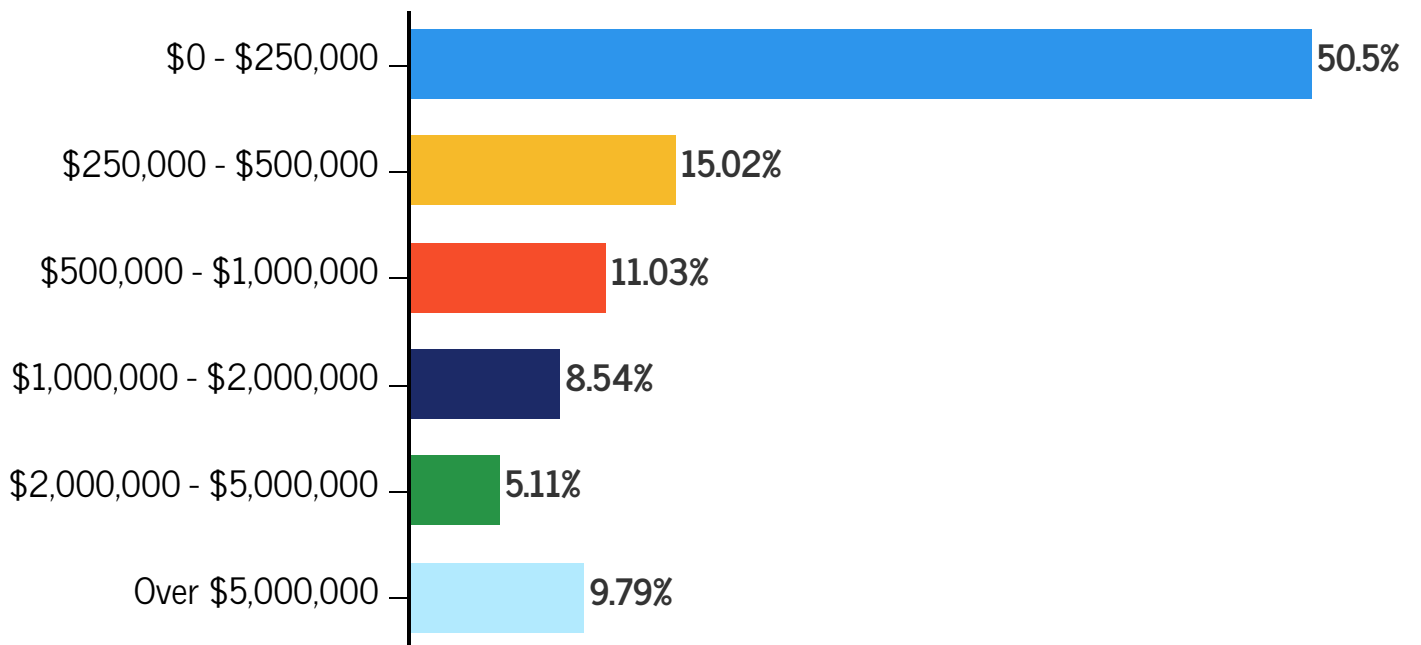
What are the most significant challenges to increasing energy efficiency and sustainability?



What's driving your company's energy efficiency programs?



How much money has your company saved as a result of its energy efficiency programs in 2017?



Market Trends Highlights



\$1 Billion



70%

of respondents organizations have an annual energy reduction goal

41%

of respondents companies are using alternative funding for energy projects

Over 70% of respondents plan to install energy storage, fuel cell, and wind technologies in their facilities in 2018

52%

of respondents organizations are using CHP as a means of energy savings

Over 80% of respondents had HVAC Improvements & LED Lighting installed at their facilities in 2017

75%

OF RESPONDENTS COMPANIES SAY FINANCIAL SAVINGS DRIVES THEIR ENERGY EFFICIENCY PROGRAMS

Training & Events

"Networking, professional development, and location are key."

"I look for potential customers and clients when making the decision to attend an event."

"Always looking for training opportunities."

"I attend events for networking opportunities"

67%

OF RESPONDENTS PREFER LIVE TRAINING

37%

OF RESPONDENTS PREFER ONLINE TRAINING

29%

OF RESPONDENTS PREFER ONDEMAND TRAINING

63% of respondents say the most important factor to consider when attending a conference is the speakers and subjects of program and 58% say it's the location of the program