
Industrial Customer Perspectives on Energy and Environment

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Key Findings

The industrial customers we surveyed:

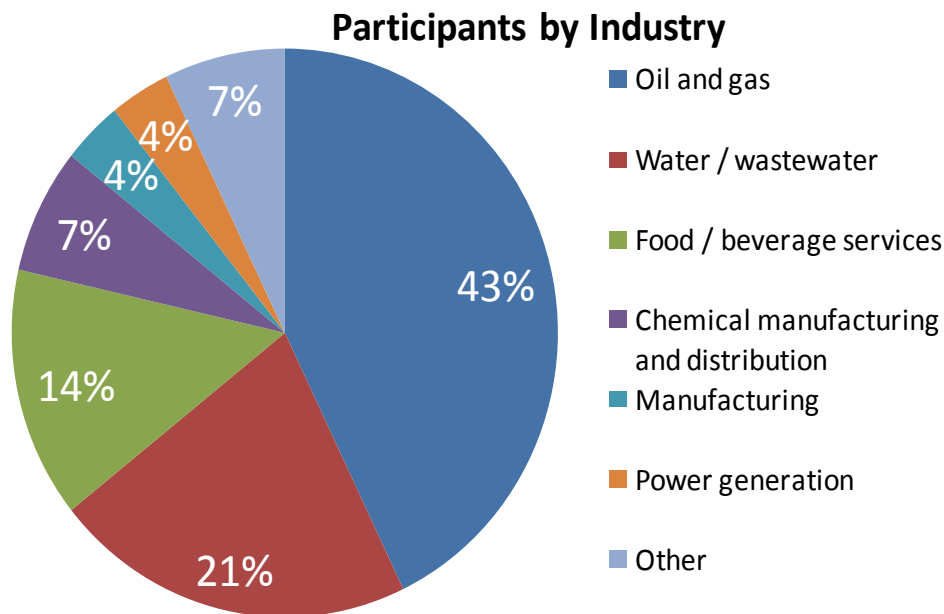
- Want to use energy more efficiently
- Pay attention to air emissions
- Would like to see more comprehensive programs
- Actively follow the carbon discussion

Methodology

- Online questionnaire given to decision-makers at industrial sites in California
 - Caveat: No statistical sampling. Respondents were recruited from existing industrial contacts from past consulting work or EE implementation projects
- In-depth phone interview conducted with volunteers
 - Caveat: Self-selection bias

Survey Respondents

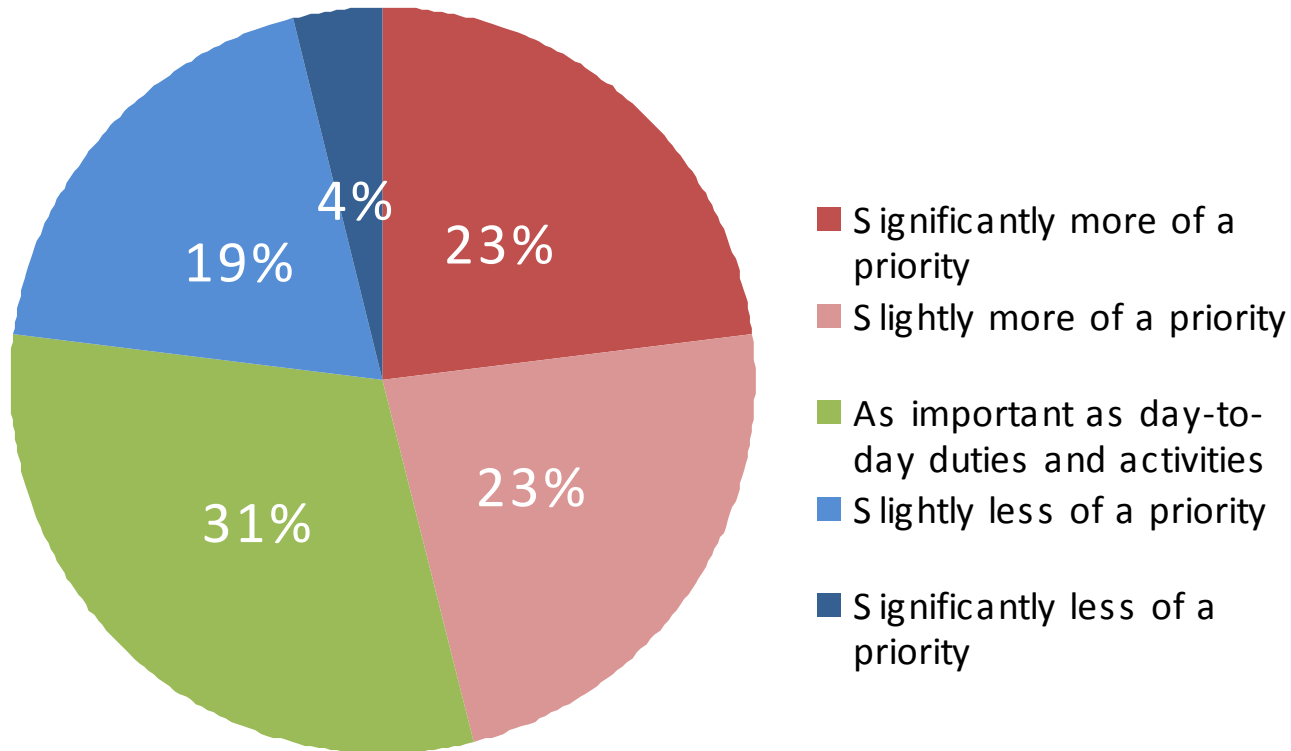
- 27 Online Surveys with 5 Follow-up Interviews
- Most industries represented, skewed toward oil and gas
- Skewed toward technical / engineering and operations management



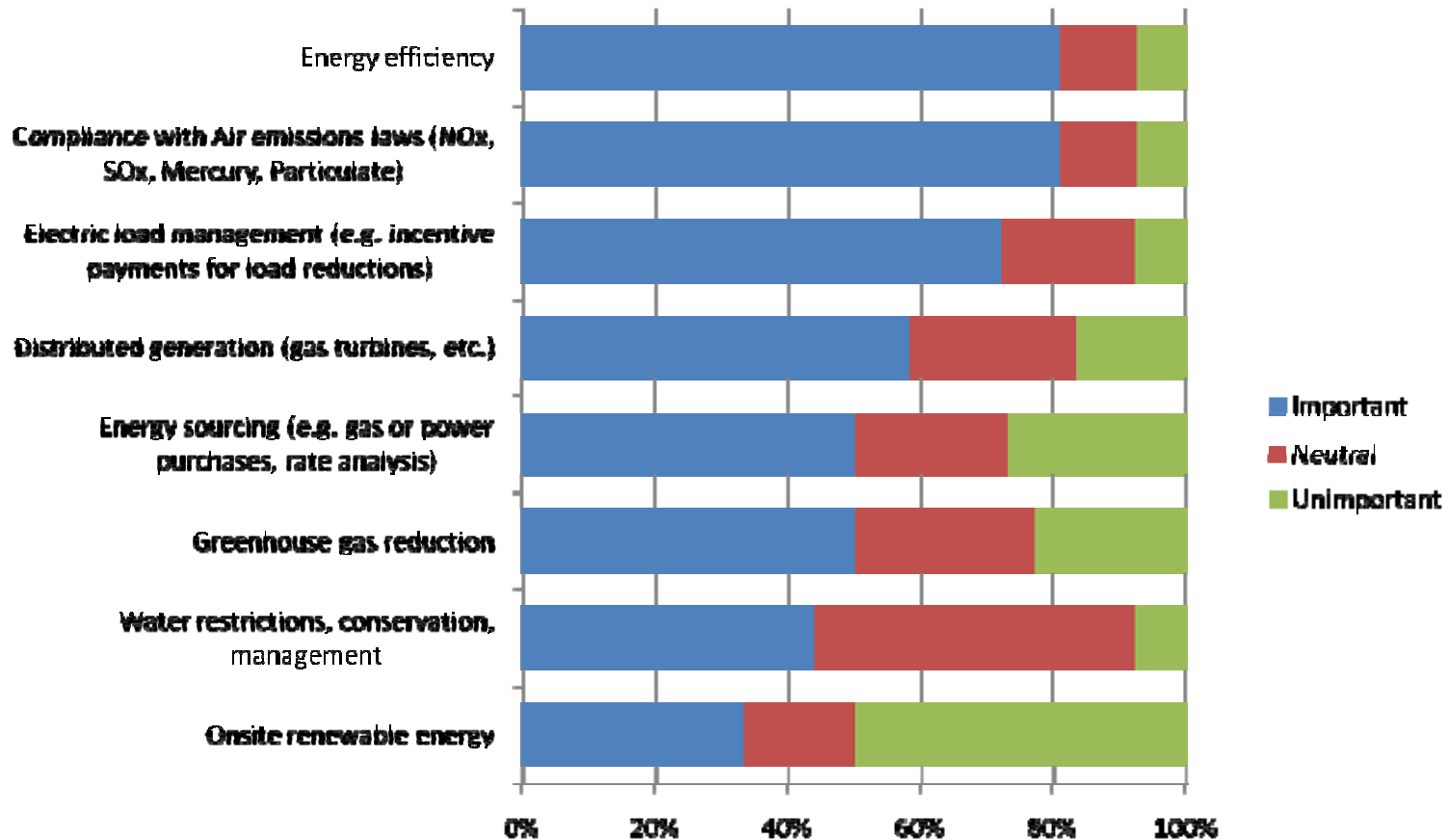
Activity	% of day
Technical / Engineering	40%
Operations Management	26%
Environmental / Reg.	22%
Business Strategy	7%
Other	5%
n=27	

Relative Importance

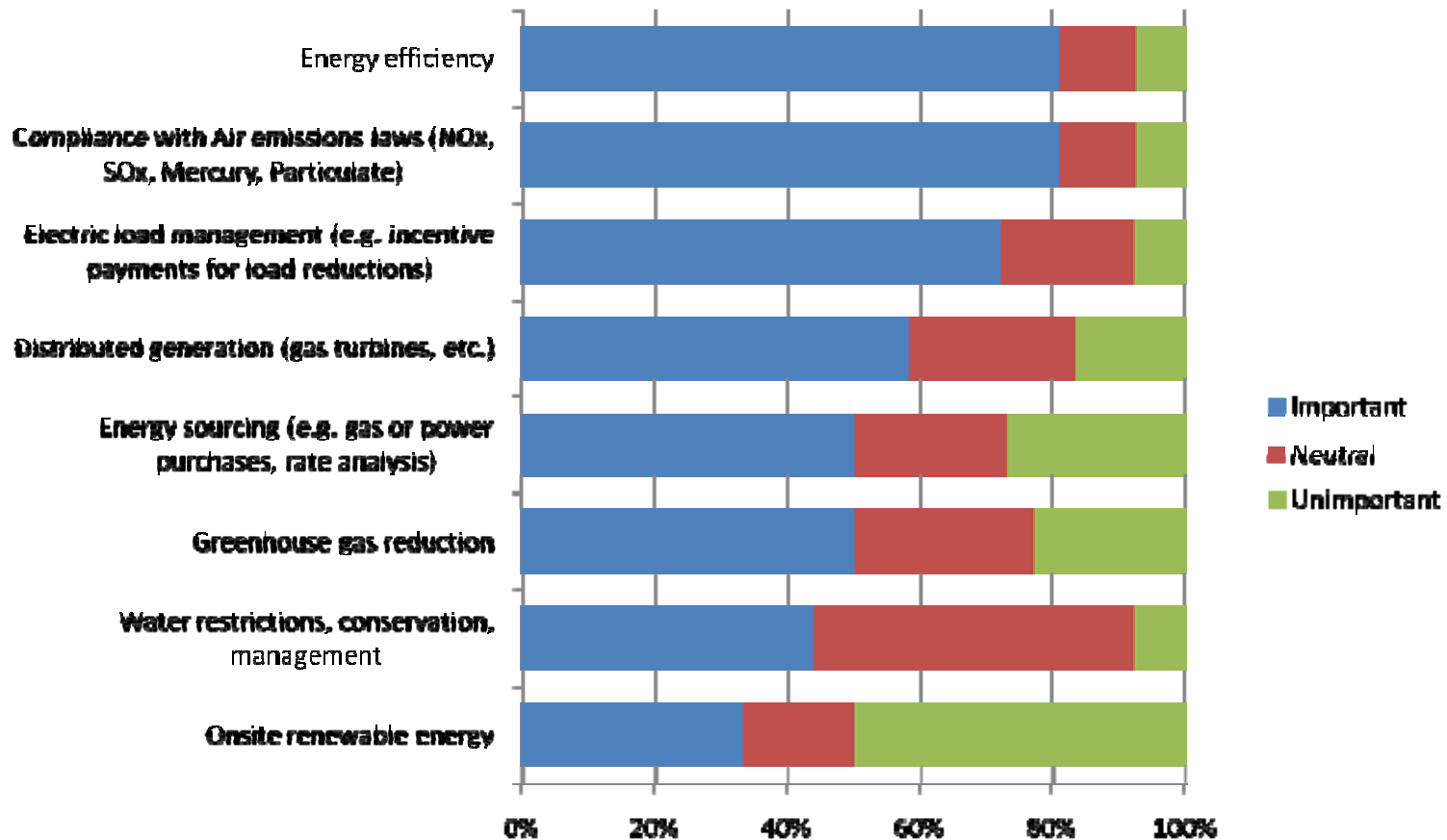
“ Compared with your day-to-day work duties and activities, where do you prioritize resource management (management of air emissions, water, energy, greenhouse gases)? ”



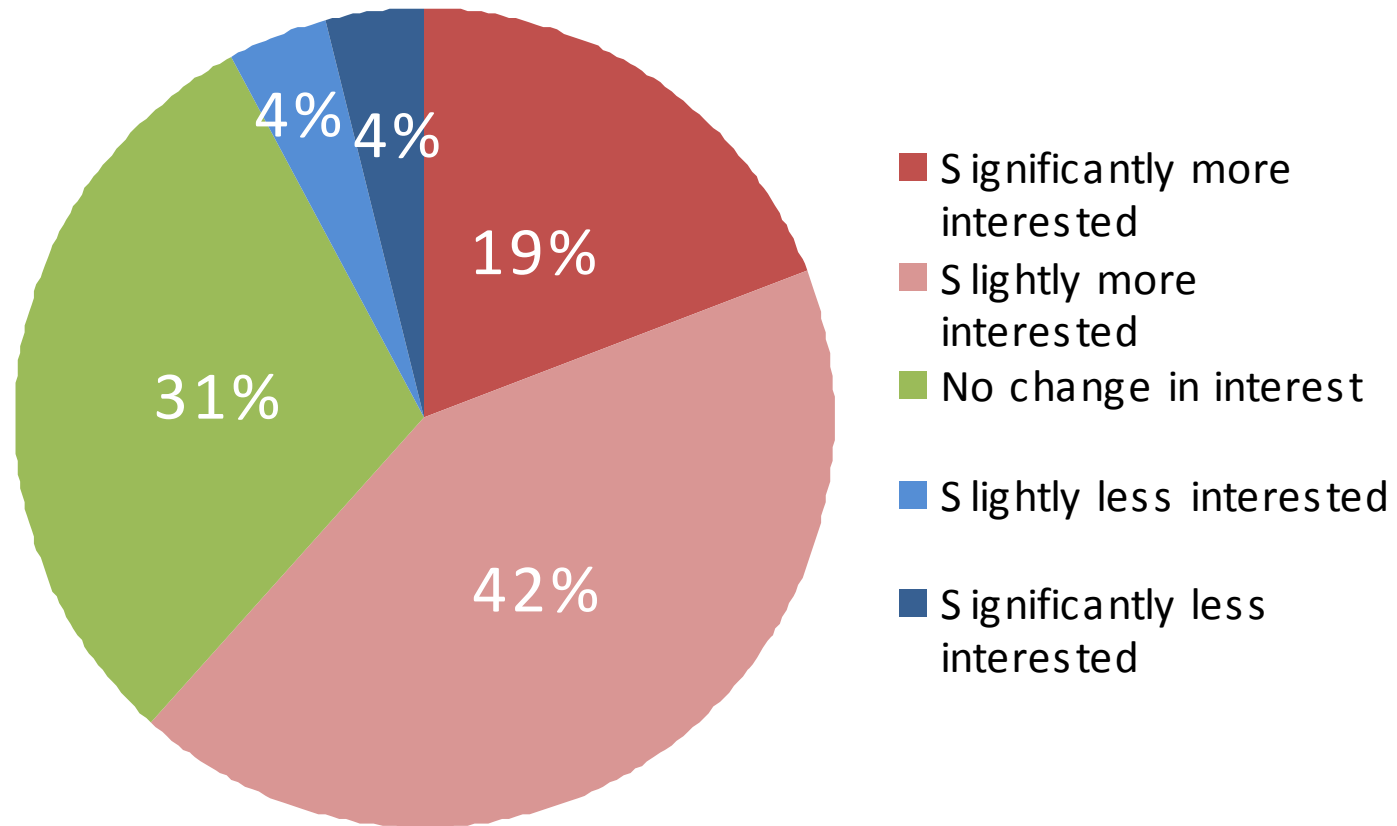
“ Please rate the following aspects of resource management based on their importance to your company: ”



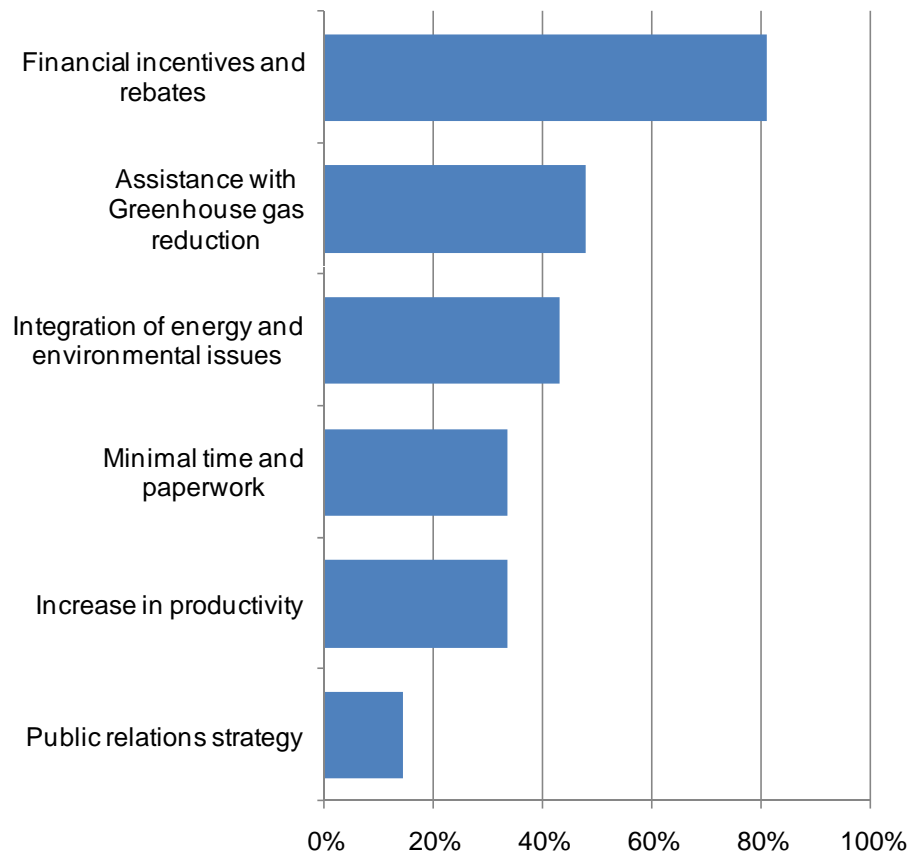
“ Please rate the following aspects of resource management based on your company’s likelihood to spend money on them in the next 1-2 years: ”



Could traditional DSM be combined with other industrial priorities?

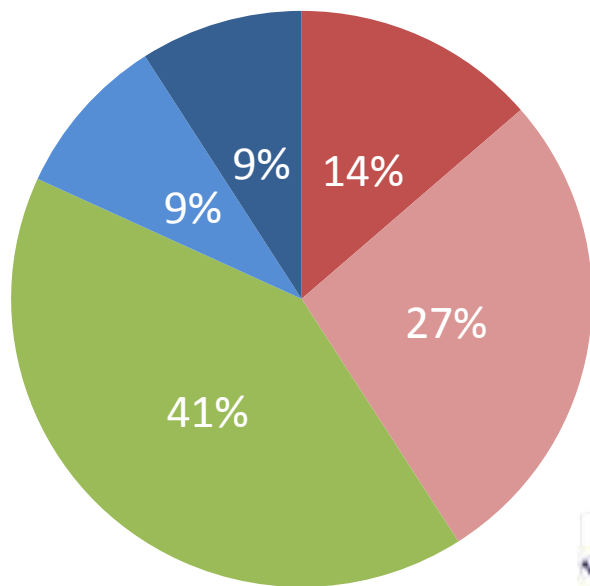


An EE program would be most attractive if coupled with...

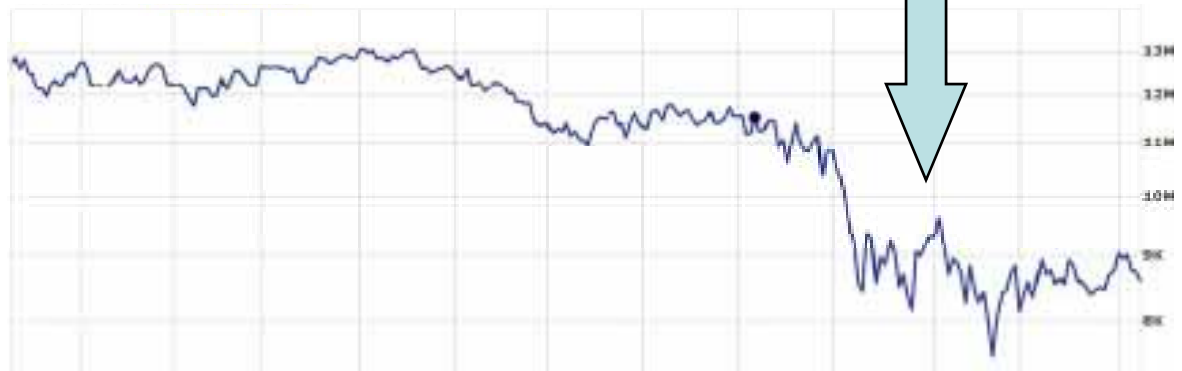


- Interest in programs including both energy and efficiency
- More interest in the bottom line
- Running theme: align program to primary goals of industrial firms
 - Return on investment
 - Low time commitment
 - Meet environmental regulation

But what about the economy?



- Significantly increased likelihood
- Slight increased likelihood
- No change
- Slightly decrease likelihood
- Significantly decreased likelihood

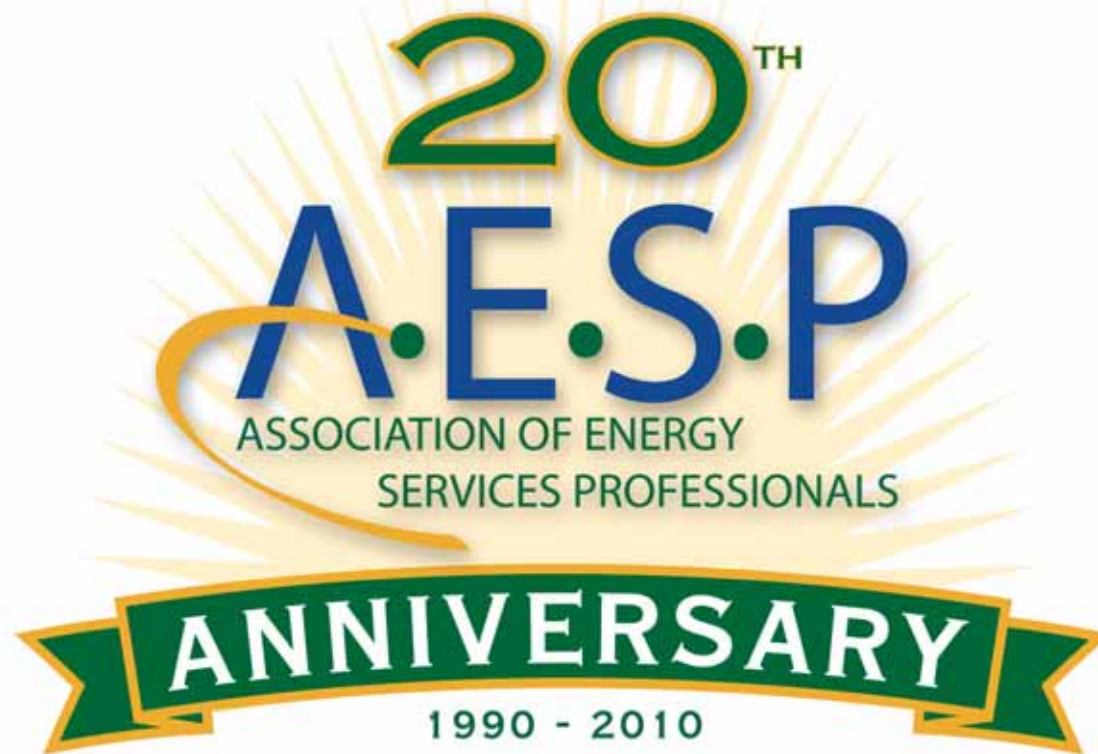


“ How have the recent changes in economic conditions impacted your likelihood of making your firm more energy efficient in the near future? ”

Summary

The industrial customers we surveyed:

- Want to use energy more efficiently
 - But only if it's easy and makes financial sense
- Pay attention to air emissions
 - But consider it a “cost-of-business” more than an opportunity
- Would like to see more comprehensive programs
 - But they would have to bridge the institutional divide
- Follow the carbon discussion
 - But are not sure about how to act



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