

Highlights from the 2013 AESP State of the Industry Report

A Thought Leaders Panel

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AESP Chair, Publications**

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Today's Panelists

- **Sami Khawaja** – SVP, Energy Services Division, Cadmus
- **Rich Sedano**, Principal and US Programs Director,
Regulatory Assistance Project
- **Lynn Westerlind**, Manager, Policy and Regulation, National
Grid
- **Ahmad Faruqui**, Principal, The Brattle Group



2013 AESP State of the Industry Report

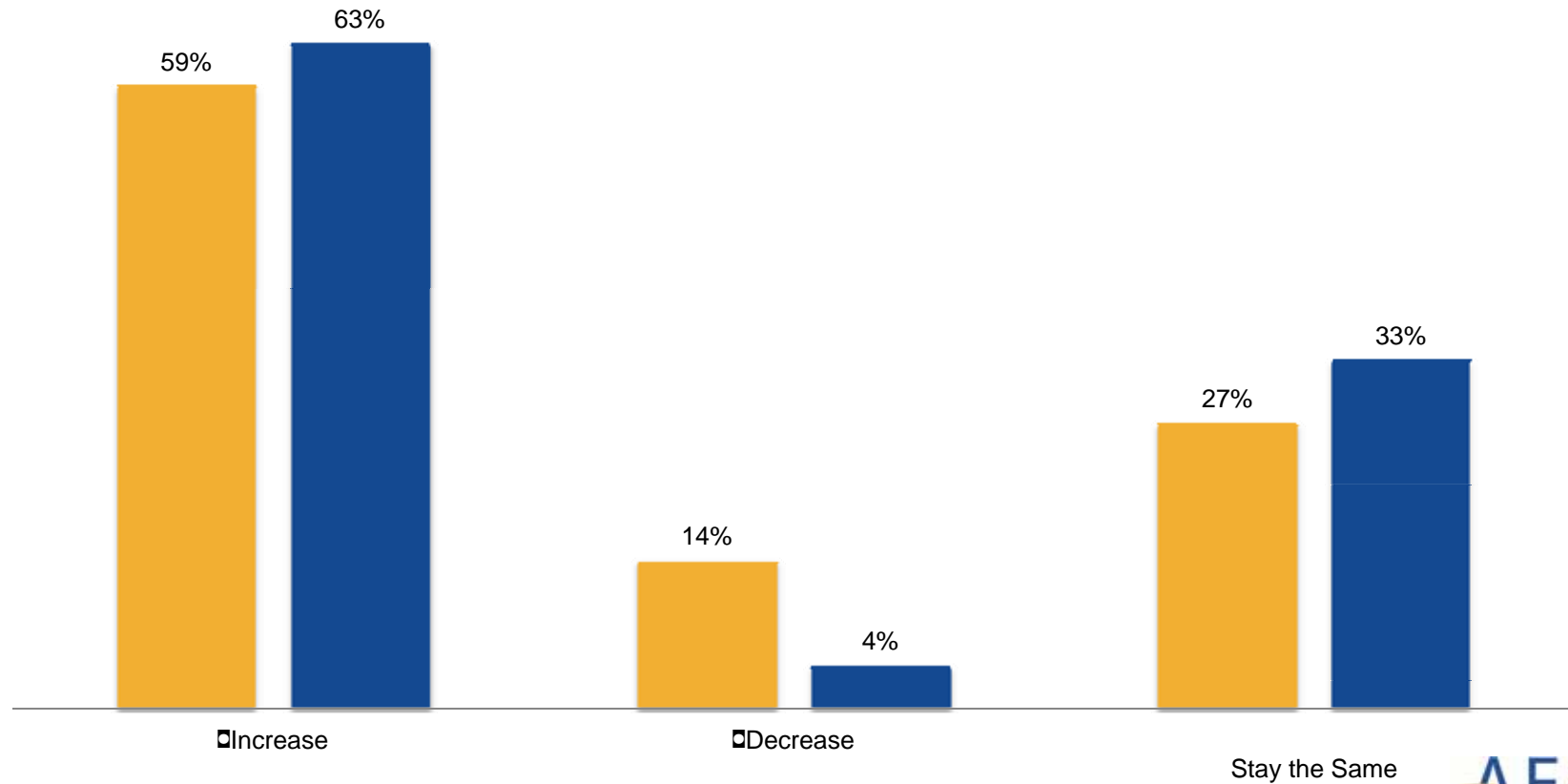
Highlights

Trend Anticipated to Continue in 2013

Comparison of Anticipated Change in Workforce in 2013

■ 2011 Responding Percent

■ 2012 Responding Percent



Stay the Same

What are the thought leaders saying?

WE NEED THESE SKILLS!

- ✓ Analytical skills for Big Data
- ✓ Energy engineers for design, implementation & evaluation
- ✓ Good market researchers & better marketing
- ✓ Excellent project management, tracking/reporting

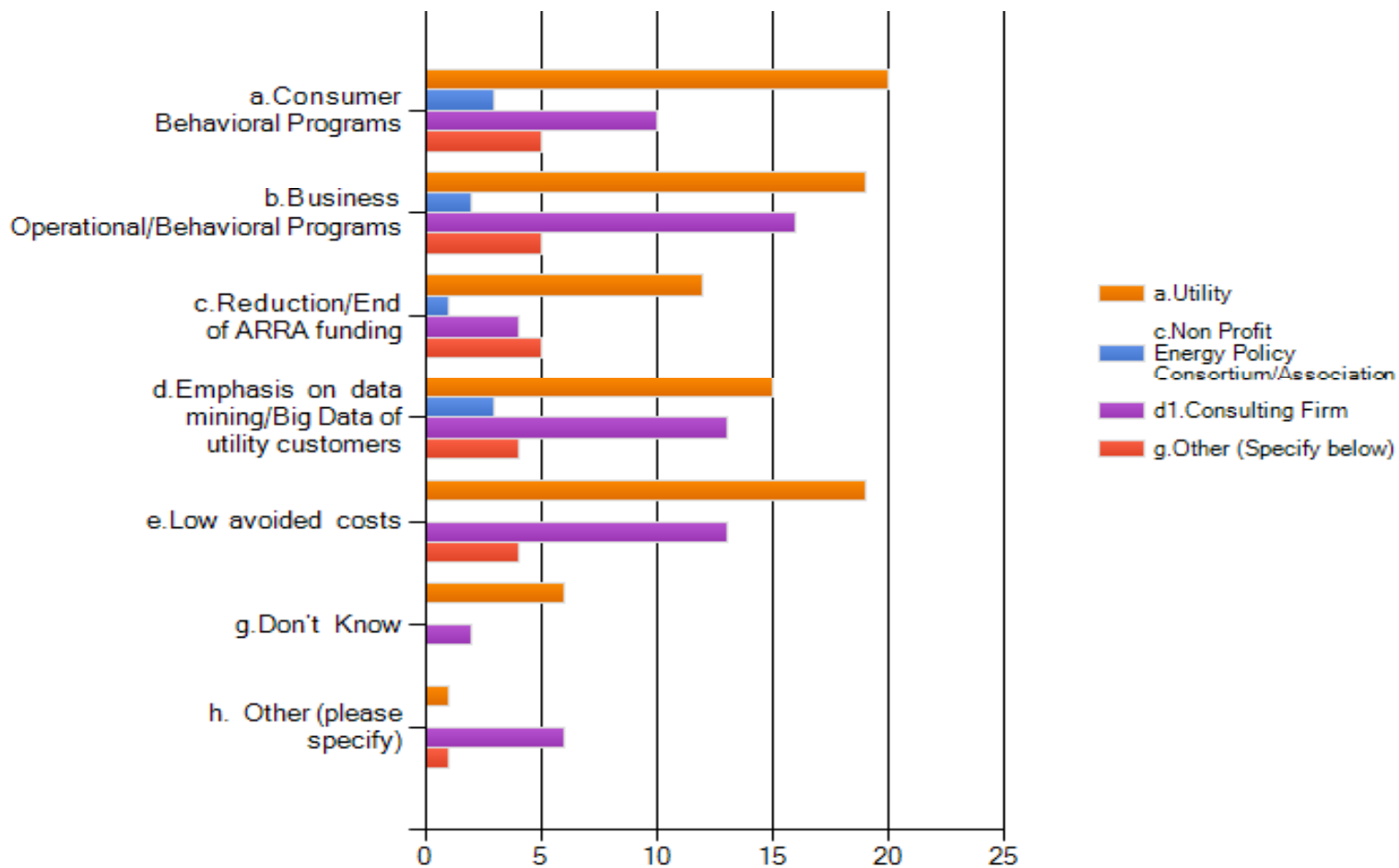
Do the Thought Leaders Agree?

**2/3 of leaders
predict increased
DSM activity
through 2015**

**1/3 think
activity
levels have
plateaued**

**Many who see
increased
activity think
the growth rate
will slow**

Behavioral Programs & Low Avoided Costs will Have Biggest Impact in 2013

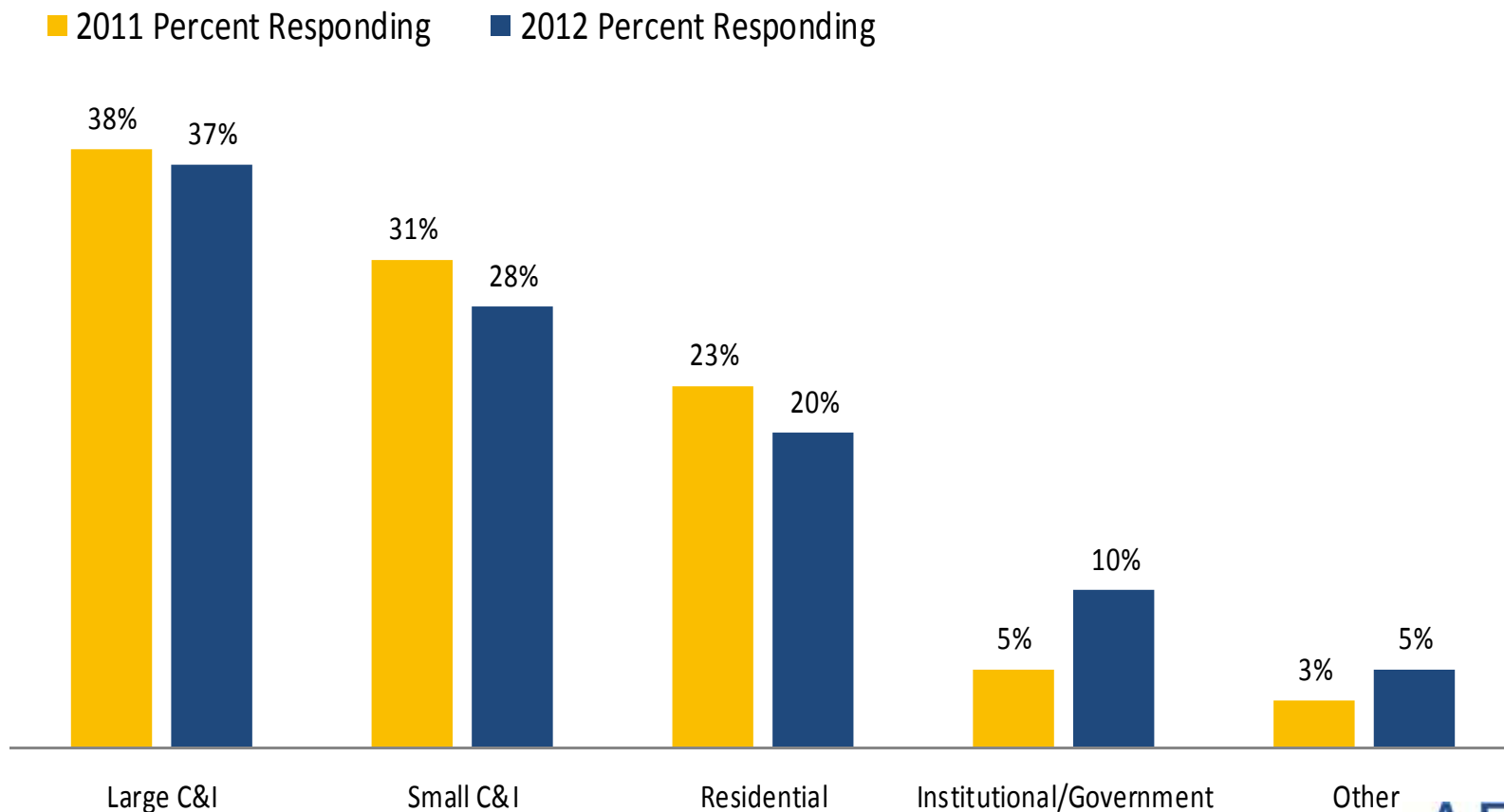


“We have not yet seen what will happen to utility DSM/DR programs given the new reality of natural gas.”

- Thought Leader

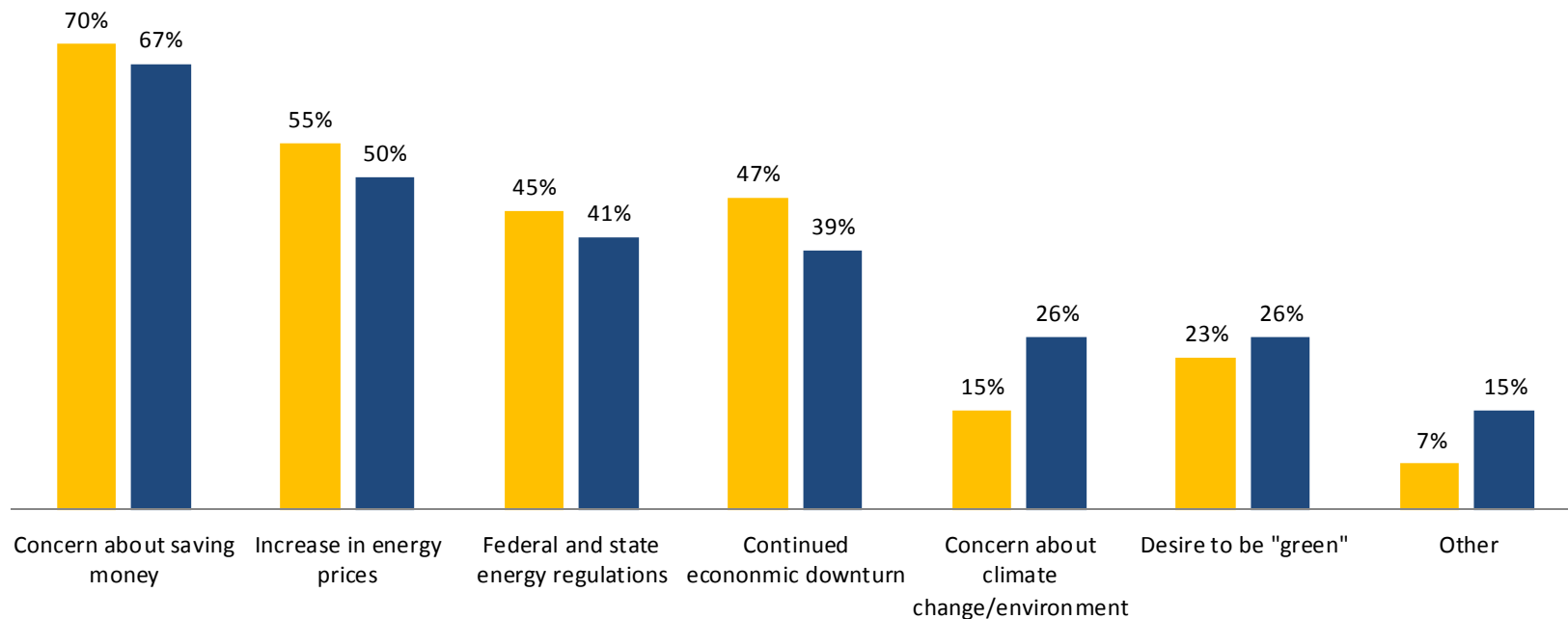
C&I Remains an Untapped Market


Comparison of Most Promising Sectors in EE/DR Industry



Money is Still the Major Motivator

Trends in Factors Influencing Consumer Adoption of EE/DR Programs
■ 2011 Percent Responding ■ 2012 Percent Responding

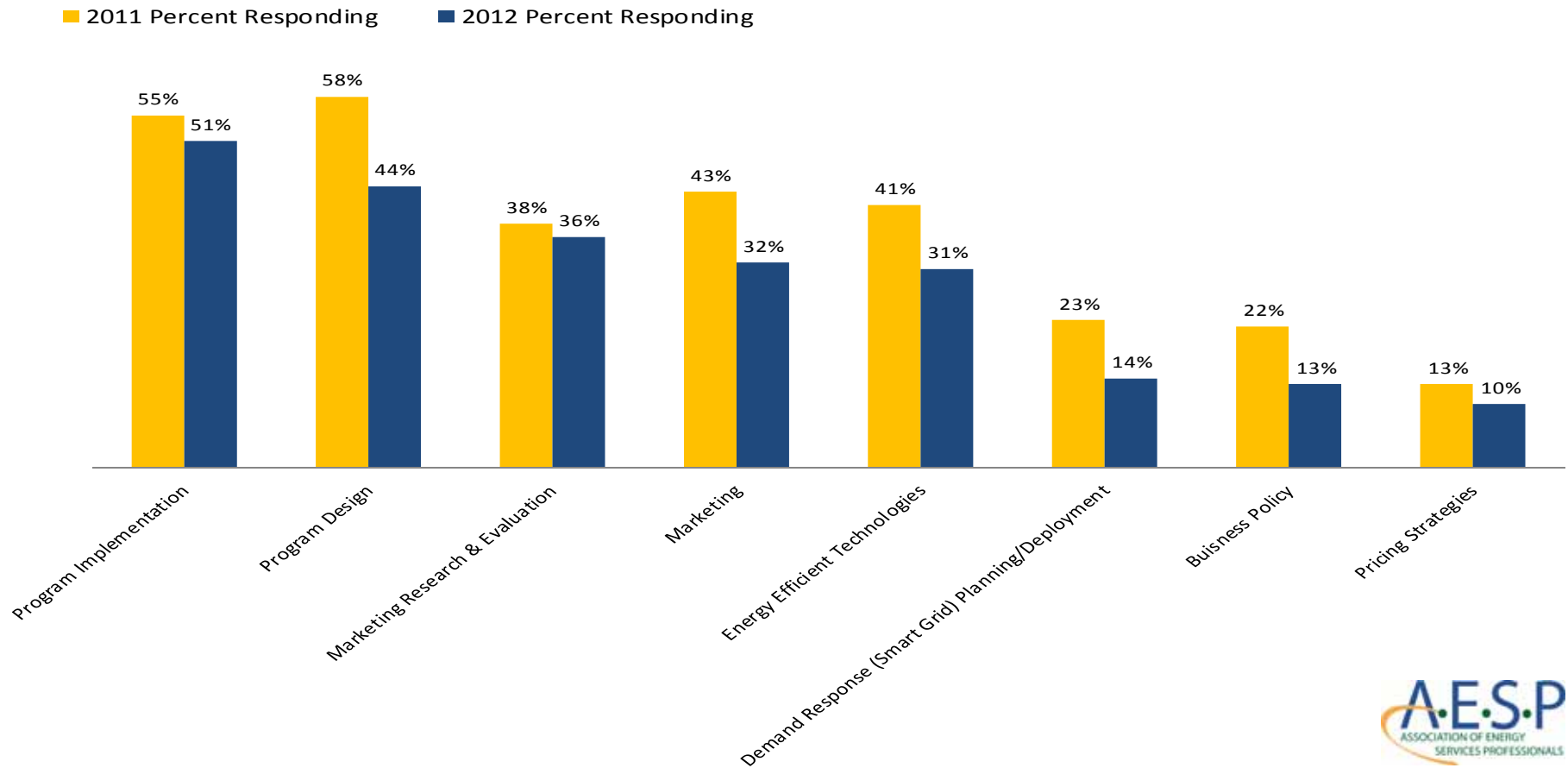




AESP Respondent Demographics

Industry Still Heavily Focused in Implementation & Design

Comparison of Topics Most Focused on at Work



Other Key Respondent Attributes

**Most (34%)
work for
utilities**

155

**Average # of
employees in
organizations**

**Good
representation
from small,
medium and
large energy
organizations**

24,500

**Total workforce
represented in the
survey**

**Regional,
national &
international
organizations
from US &
Canada**



DISCUSSIONS & QUESTIONS

Type Your Comments and Questions in the Chat Box



Save the Dates

Sept. 30-Oct. 2, 2013

AESP's Fall Conference
Seattle, WA

Jan. 27-30, 2014

AESP's National Conference
San Diego, CA

May 12-14, 2014

AESP's Spring Conference
Baltimore, MD

For more information - www.aesp.org

