



## Summary Results | July 2020

# SURVEY SUMMARY

Between March and July 2020, Gatepoint Research invited selected executives to participate in a survey themed *Energy Management Strategies for the Corporation*.

- ▶ Candidates were invited via email and 113 executives have participated to date.
- ▶ Management levels represented are all senior decision makers: 11% are CxOs or VPs, 24% are Directors, and 65% are Managers.
- ▶ Survey participants represent firms from a wide variety of industries including business services, financial services, healthcare, media, manufacturing (general, primary and high tech), mining, retail trade, telecom services, transportation, utilities, and wholesale trade.
- ▶ Responders work for firms with a wide range of revenue levels:
  - 75% work in Fortune 1000 companies with revenues over \$1.5 billion;
  - 10% work in mid-market or large firms whose revenues are between \$250 million and \$1.5 billion;
  - 15% work in small companies with less than \$250 million in revenues.
- ▶ 100% of responders participated voluntarily; none were engaged using telemarketing.





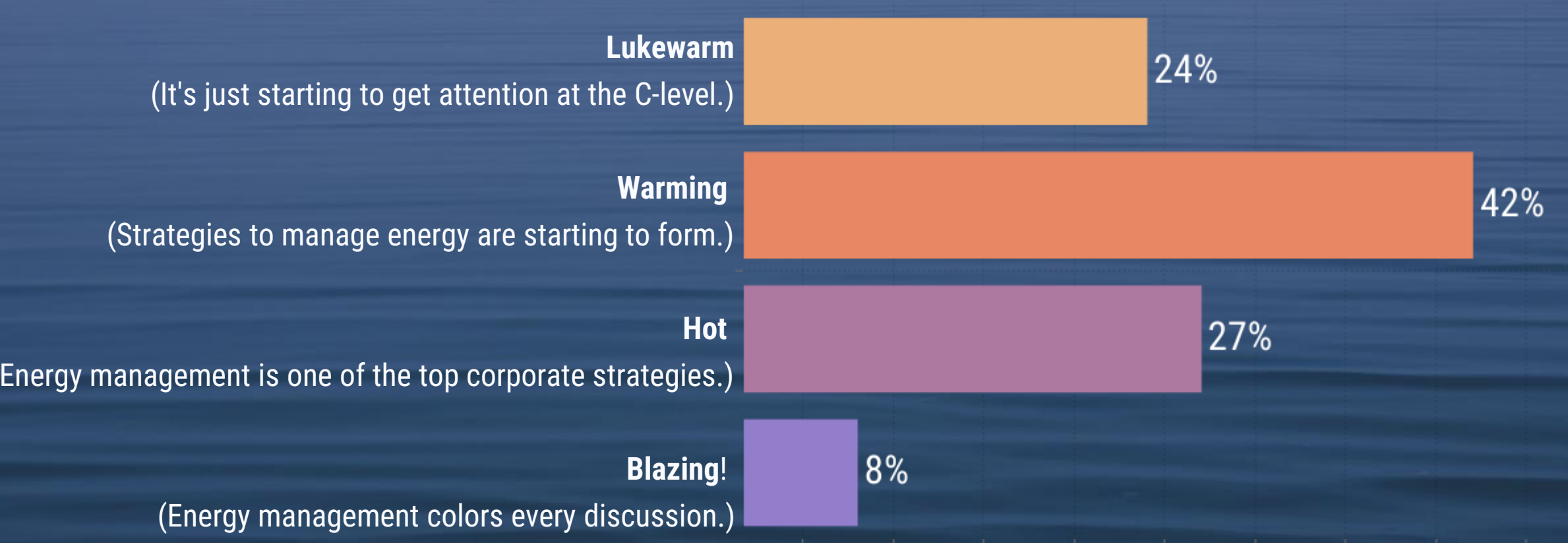
# EXECUTIVE OVERVIEW

Energy management is top of mind for many organizations, but the devil is in the details. Cost containment needs to be balanced with changes that affect business sustainability, while global market disturbances can seriously impact an organization's bottom line.

This survey asks respondents to report:

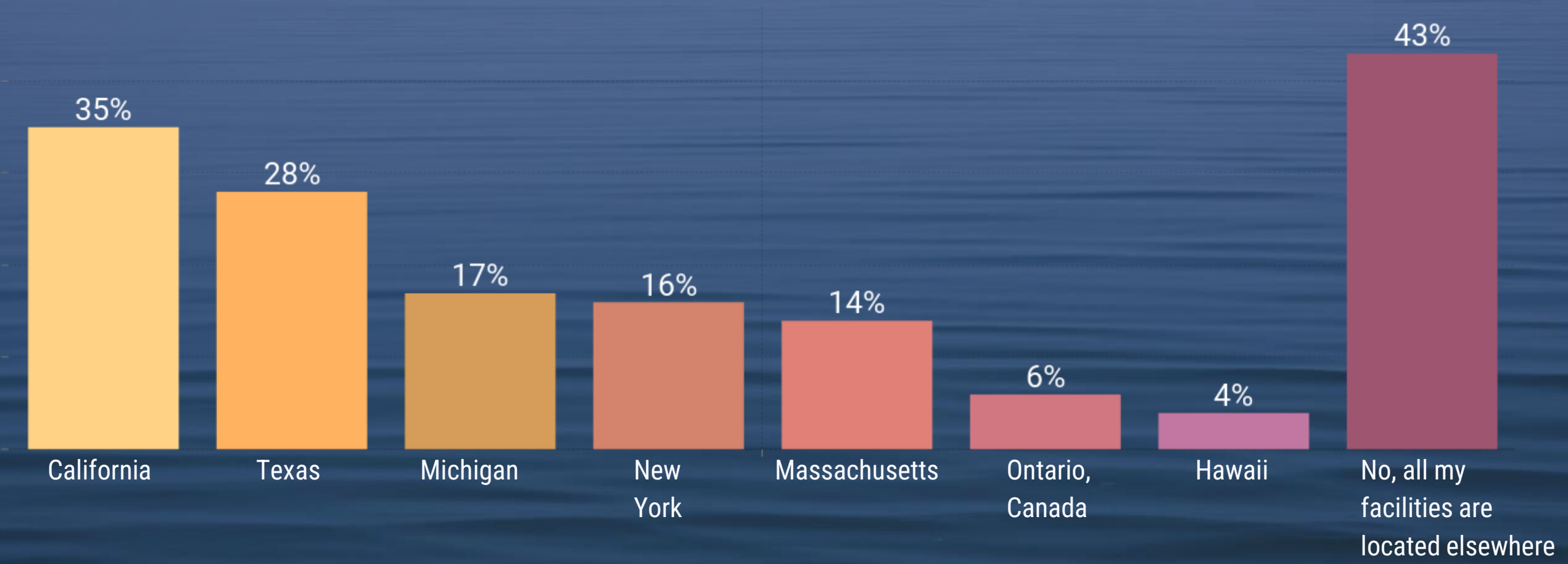
- How much attention does energy management receive in their organization?
- Where are their facilities located?
- Are they receiving the expected ROI from energy projects they've initiated?
- What prevents them from initiating new energy projects?

# How hot a topic is energy management for your organization?



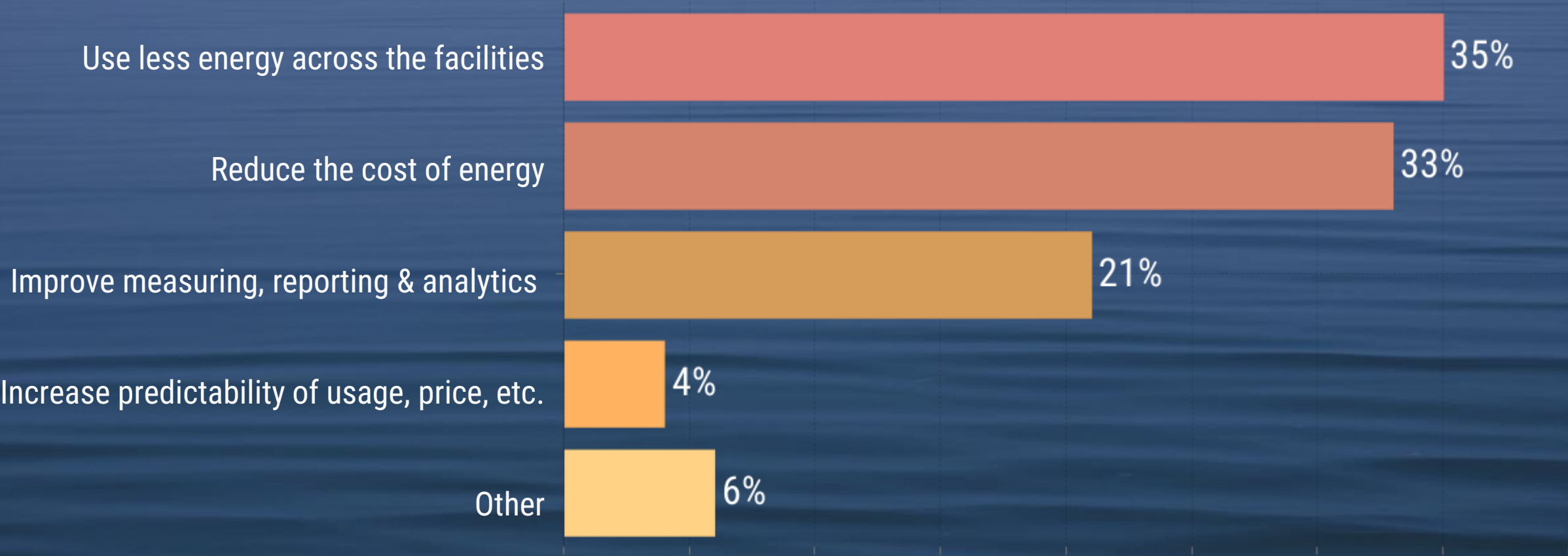
*On the topic of energy management, 24% say it barely gets attention; 42% say strategies are just now emerging. More than a third of responders say energy management is a top strategy (27%) or is literally coloring every conversation (8%).*

# Do you have a major facility with significant energy costs in any of the following locations?



*57% of respondents have one or more facilities in these 7 regions, with more than a third having a location in California. The next most popular region is Texas, where 28% have locations.*

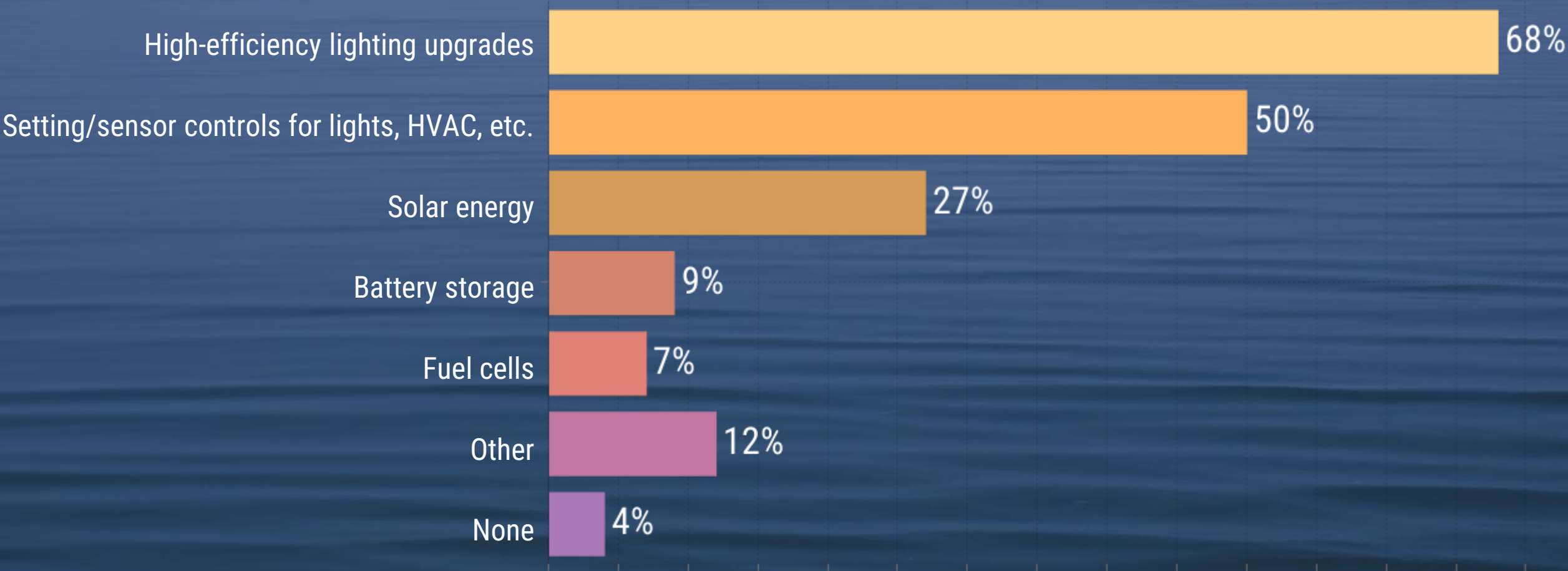
# What energy management goal is at the top of this list?



*Nearly even at the top of the list of energy management goals for respondents: reducing energy use (35%) and reducing costs (33%). The top goal for 21% is improving their ability to measure, report, and analyze energy use.*

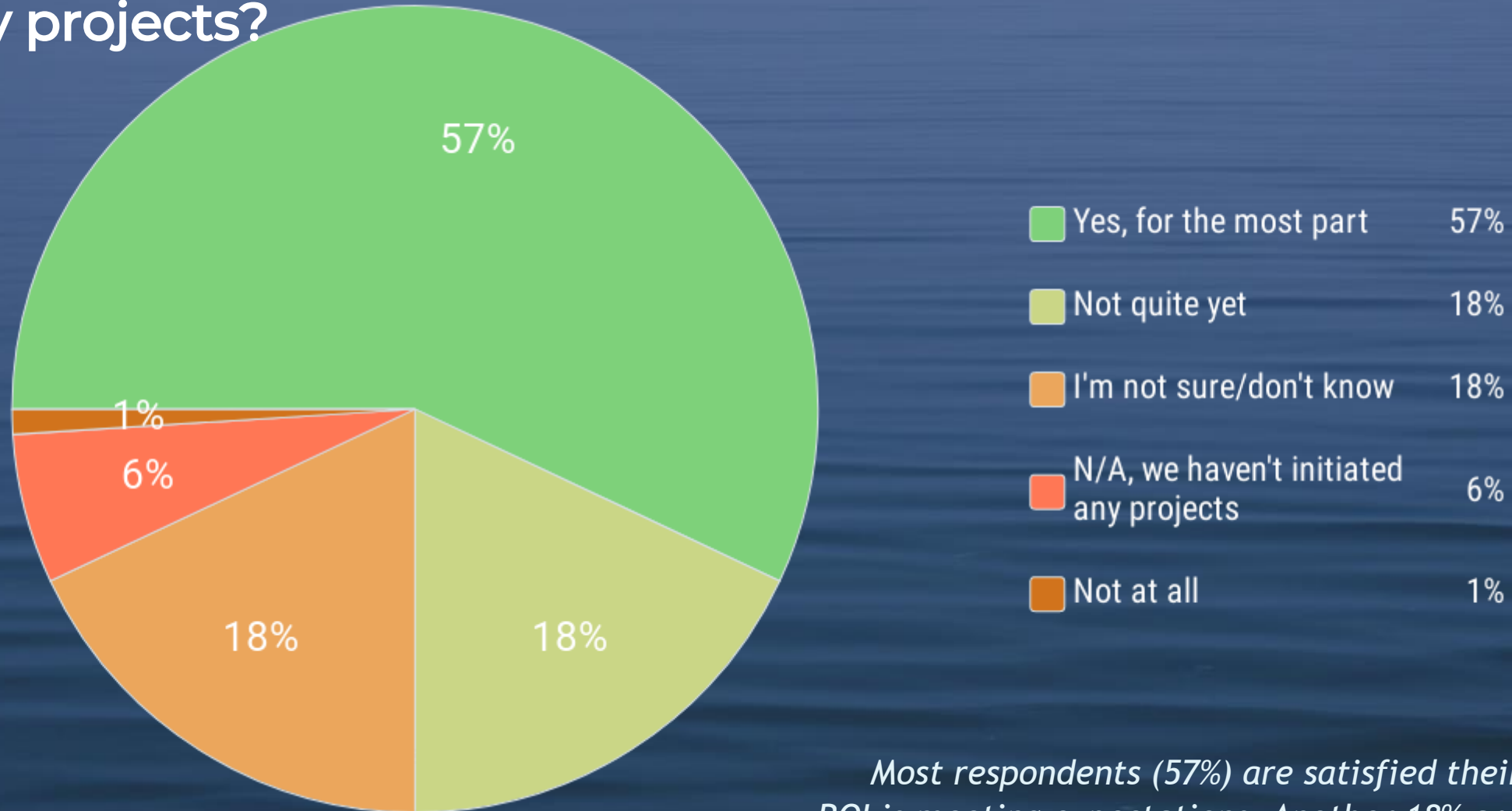


# What types of energy projects have you initiated in the last 5 years?



*In the past five years, more than two thirds of respondents implemented high-efficiency lighting upgrades. Half have installed setting or sensor controls for lights, HVAC, and other energy consumers in their facilities, and 27% initiated solar energy projects.*

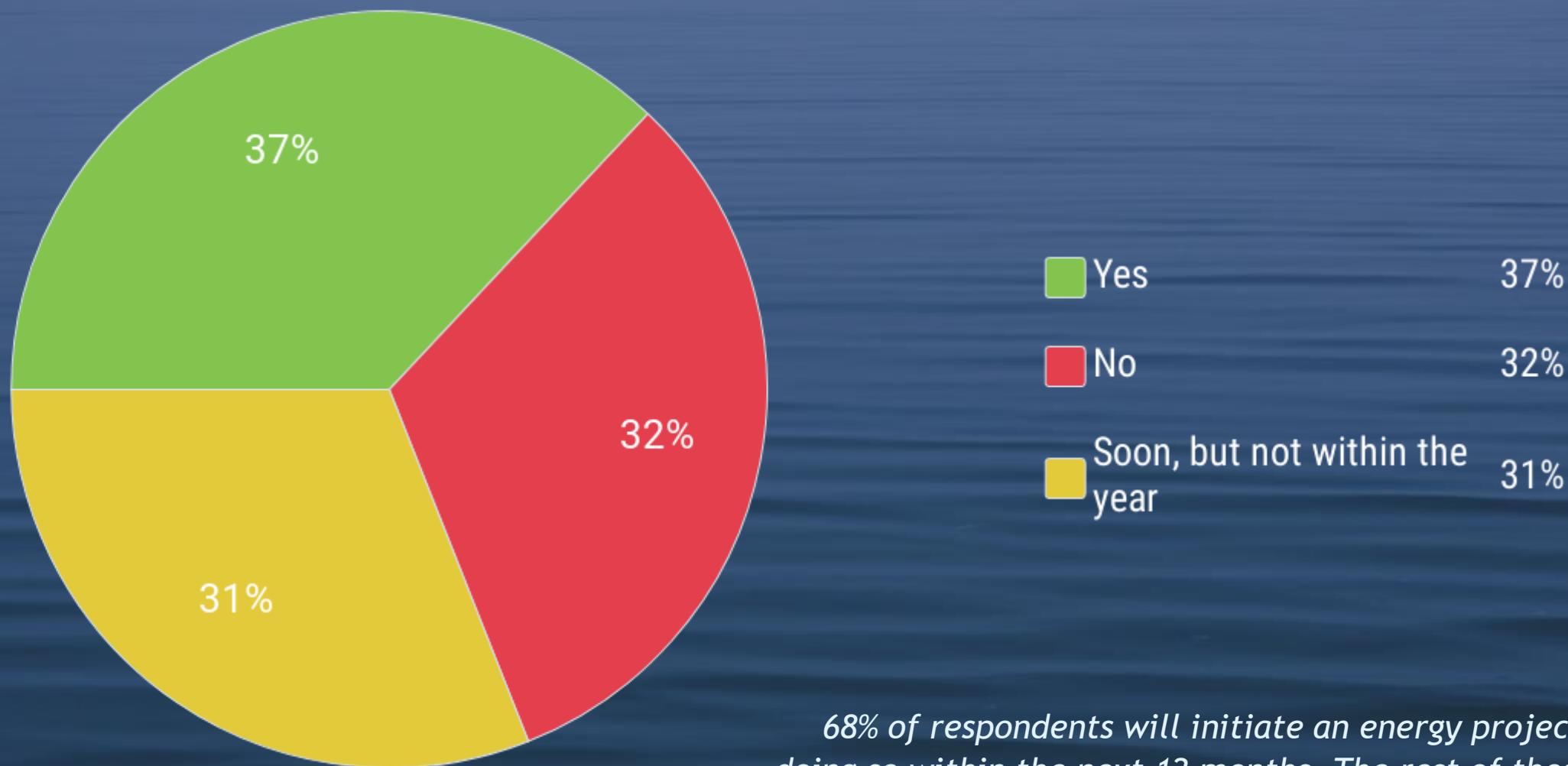
# Are you receiving the expected return on your investment from your energy projects?



*Most respondents (57%) are satisfied their energy project ROI is meeting expectations. Another 18% are still waiting to receive the expected ROI.*

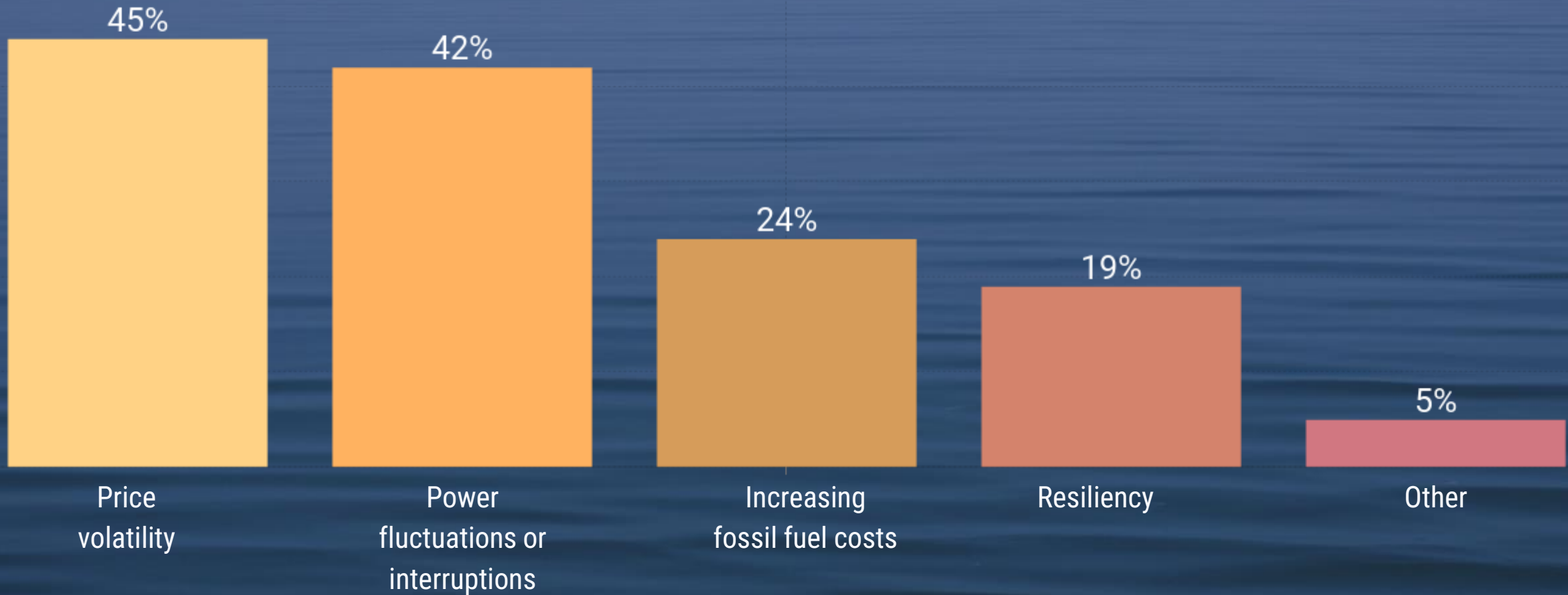


# Are you considering or initiating an energy project in the next 12 months?



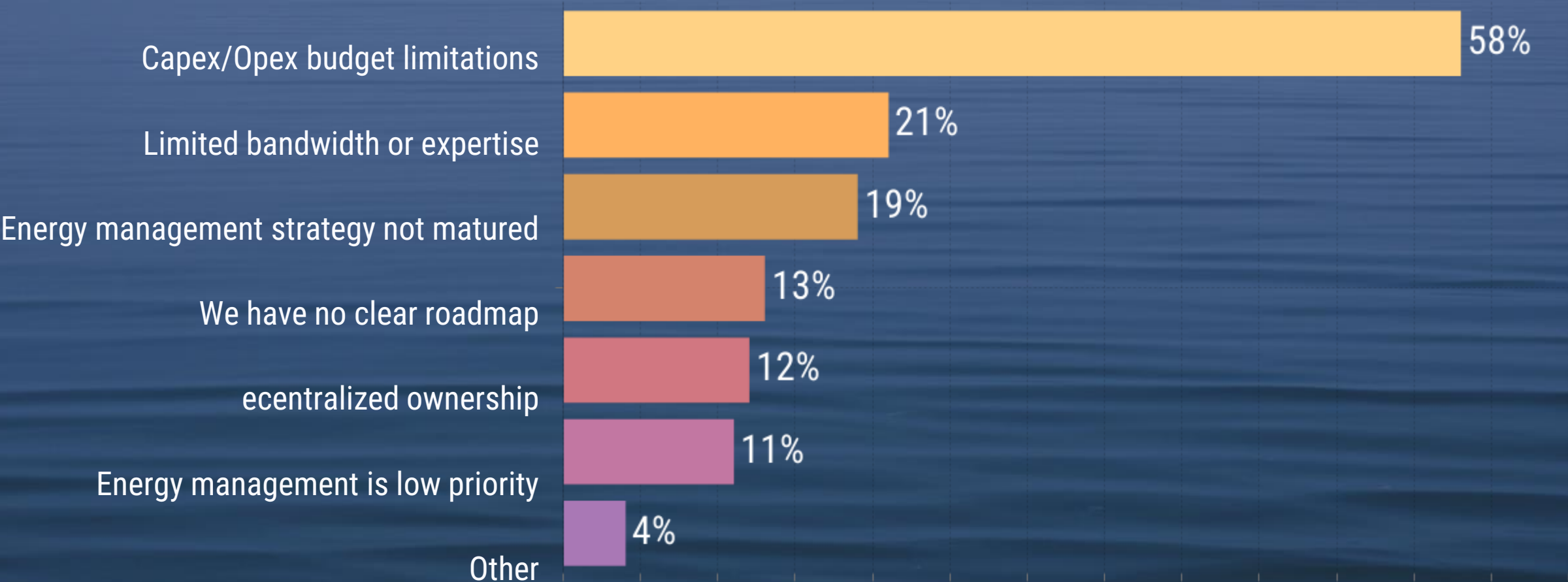
*68% of respondents will initiate an energy project, with 37% doing so within the next 12 months. The rest of those surveyed say their projects are a little more distant in the future.*

# What are your top concerns about managing energy?



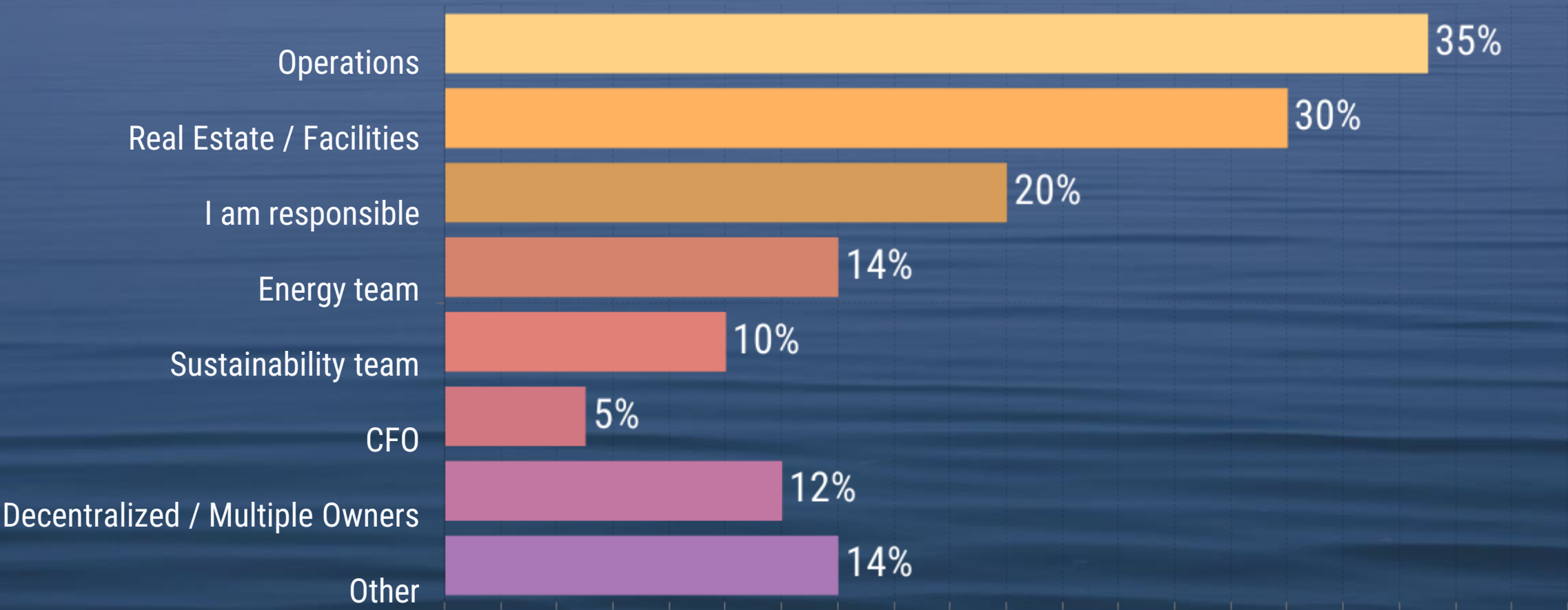
*45% of respondents with energy management responsibilities get ajita thinking about price volatility, and nearly as many say power fluctuations worry them the most (42%). Fewer worry about fossil fuel costs (24%) and resiliency (19%).*

# What barriers might prevent you from initiating new energy projects?



*Far and away the greatest stumbling block to initiating a new energy project? Budget limitations.*

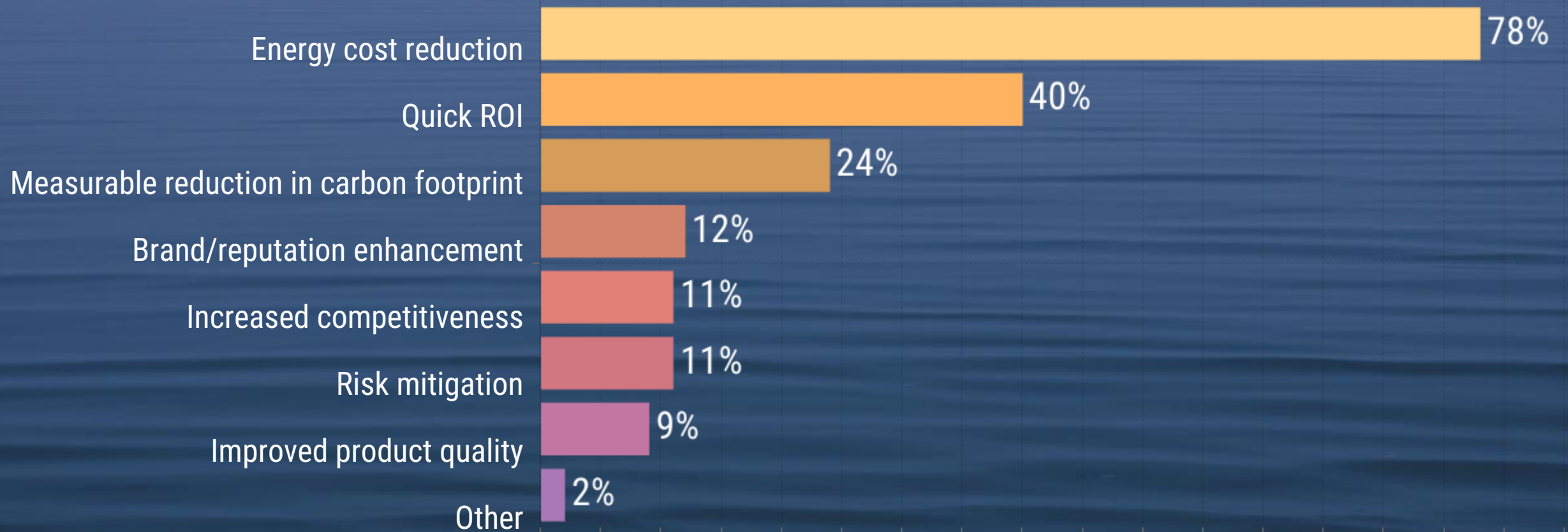
# Who is responsible for initiating energy projects in your organization?



*For 35% of respondents the Operations team is responsible for starting energy projects, and for 30% Real Estate/Facilities departments own the responsibility. 20% of those who completed the survey are directly responsible for these projects.*



# What top two benefits would drive a decision to invest in energy management technology?

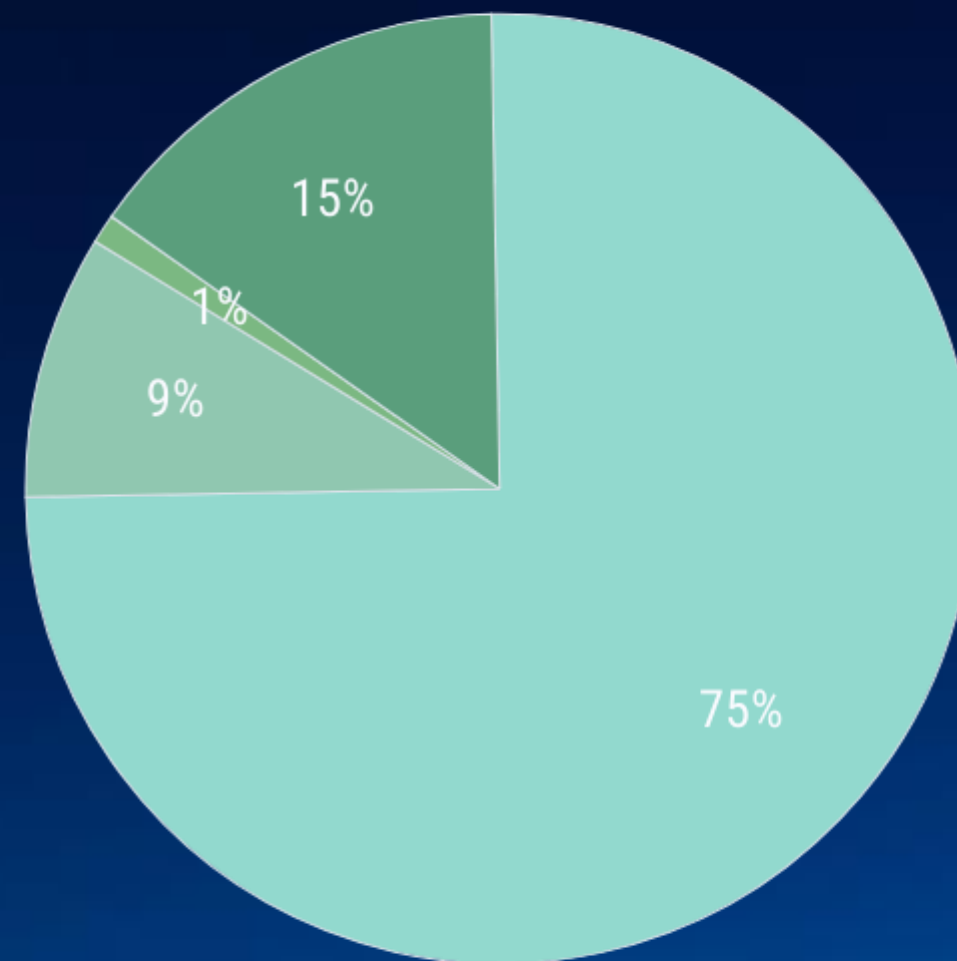


*The majority (78%) of respondents say reducing the cost of energy is one of the top two benefits that would drive an investment decision in energy management technology. Another top benefit that appeals to those surveyed is a quick return on their investment (40%).*

# REVENUE

75% of those surveyed work in Fortune 1000 companies with revenues over \$1.5 billion.

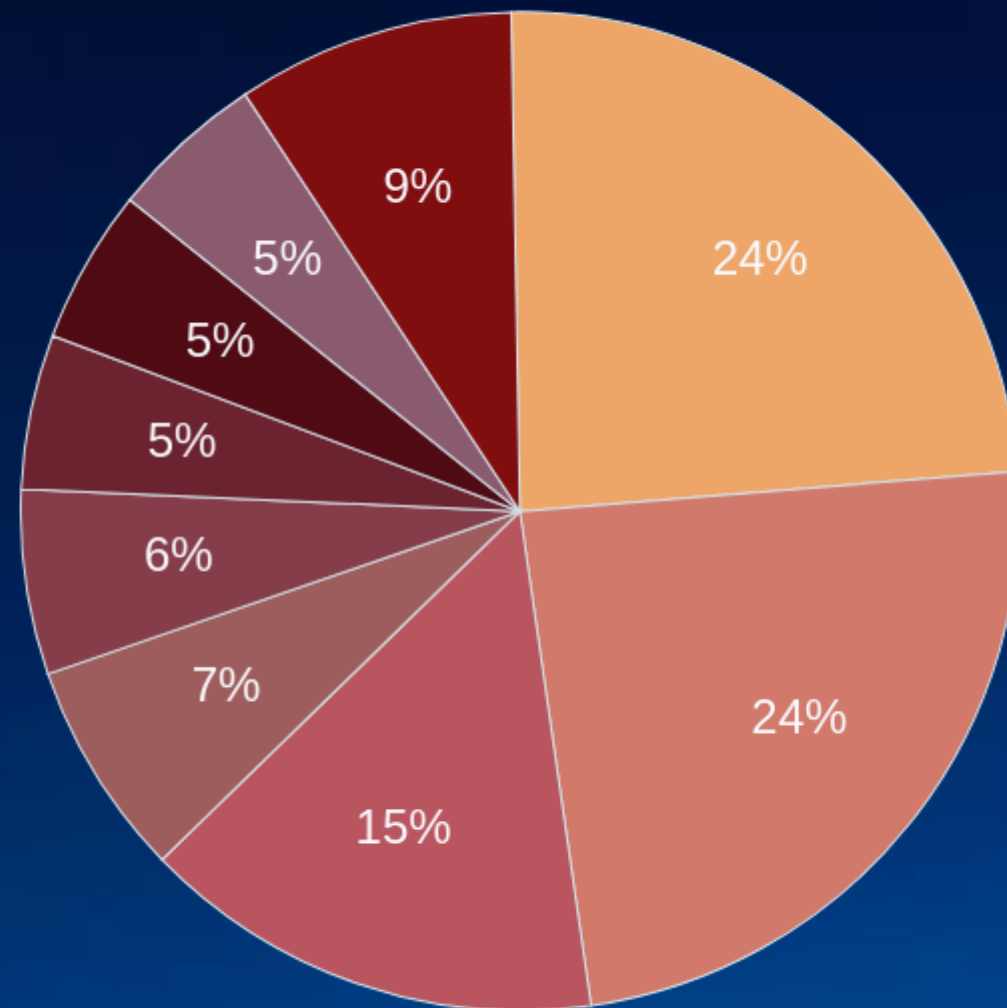
>\$1.5billion	75%
\$500 million - \$1.5 billion	9%
\$250 - 500 million	1%
<\$250 million	15%



# INDUSTRY SECTORS

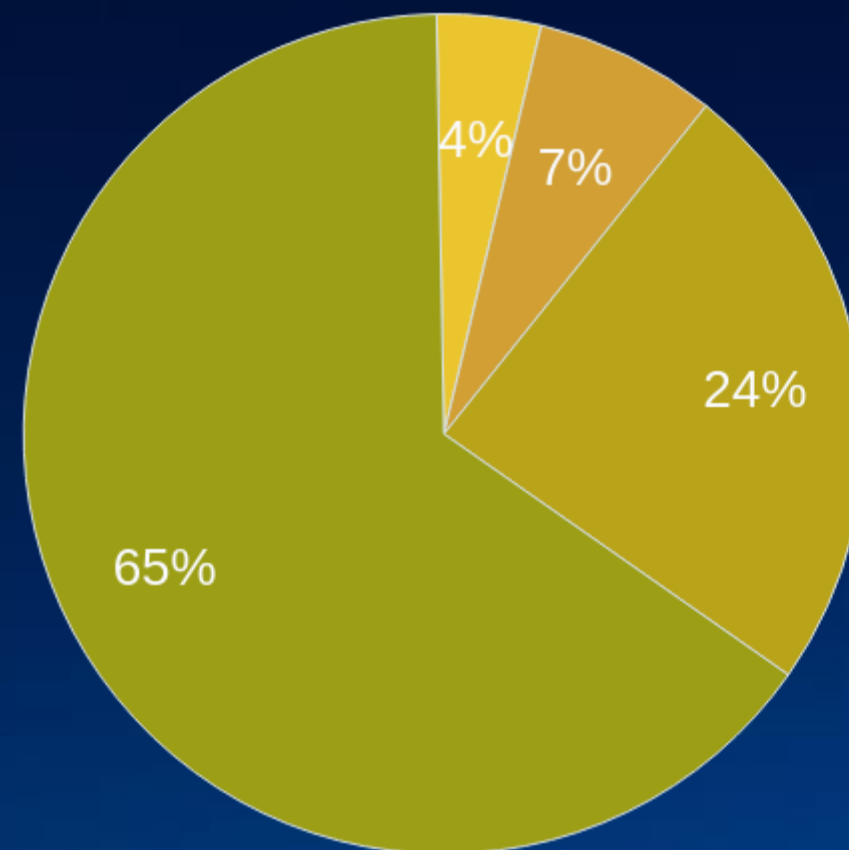
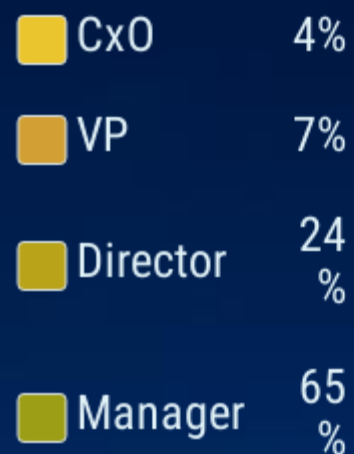
Responders represent a wide variety of industries.

Mfg - Primary	24%
Retail Trade	24%
Utilities	15%
Mfg - General	7%
Financial Services	6%
Telecom Services	5%
Mfg - High Tech	5%
Wholesale Trade	5%
Other: Media, Transportation, Business Svcs, Healthcare, Mining	9%



# JOB LEVEL

35% of survey respondents hold director or executive level positions in their organization.





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