



2012 Maryland Clean Energy Industry Survey

Conducted by the Maryland Clean Energy Center



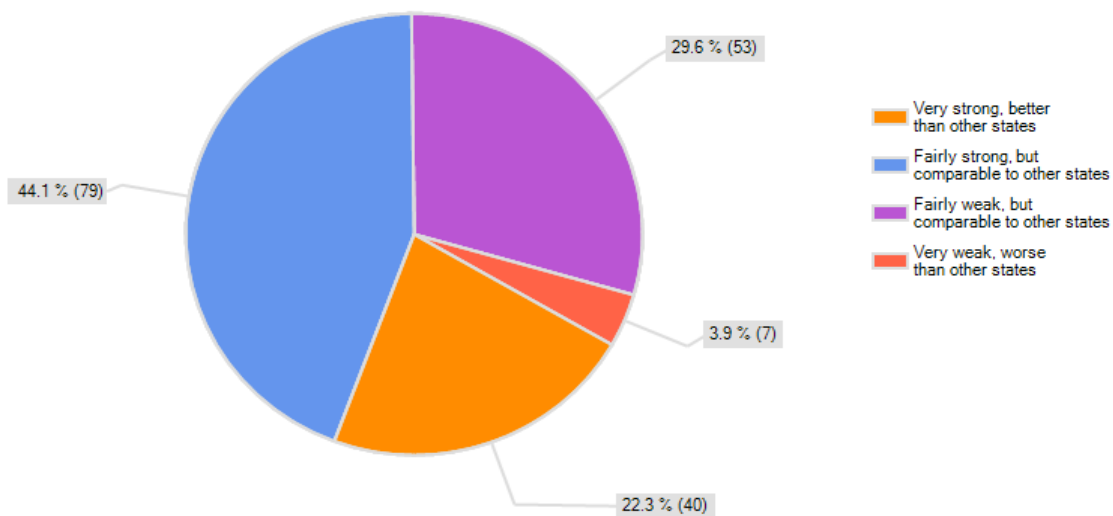
State of the industry

Maryland represents an ideal environment for businesses in the clean energy industry.

Two-thirds of surveyed businesses said the state's clean energy industry was either very strong or fairly strong, and 23 percent said the state's clean energy industry was better than other states.

Only three percent said it was worse than other states.

How would you categorize the clean energy and energy efficiency industry in Maryland?



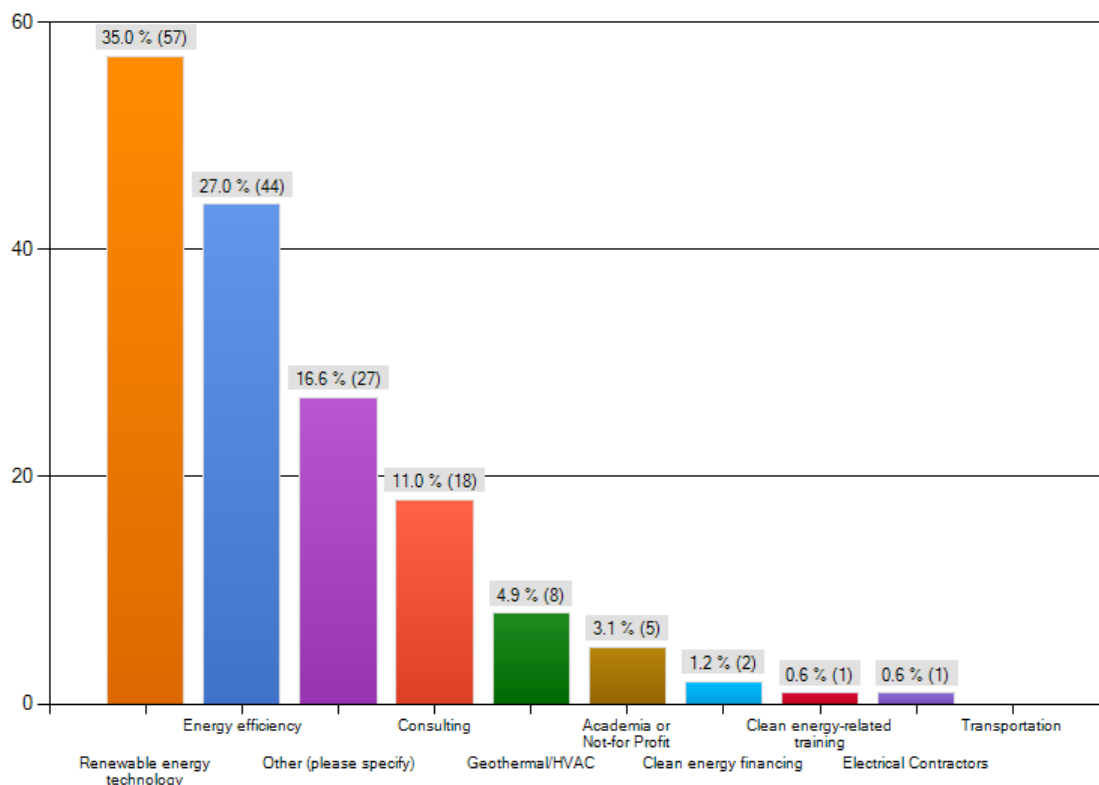
Industry snapshot

Renewables and energy efficiency businesses dominate the state's clean energy industry.

35% of surveyed businesses are focused on renewable energy, while 27% are focused on energy efficiency.

A large portion of other surveyed businesses work in association with the industry, through consulting, training, financing, or analysis.

In what sector of the clean energy industry would you place your business?



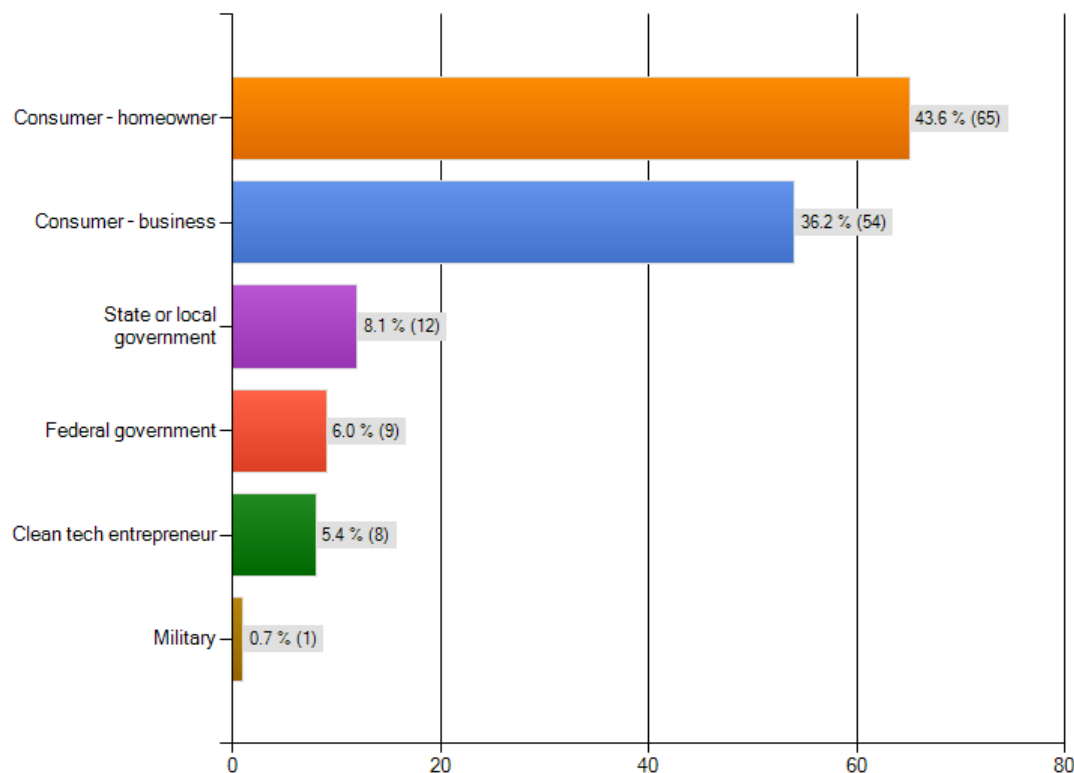
A focus on consumers

Consumers – both homeowner and other businesses – are the largest demographic (nearly 80%) served by Maryland's clean energy industry.

44% of respondents said homeowners were their primary customer, while 36% listed other businesses.

Nearly 15% say government or the military are their primary customer demographic.

What is the demographic of your primary customer/ audience?



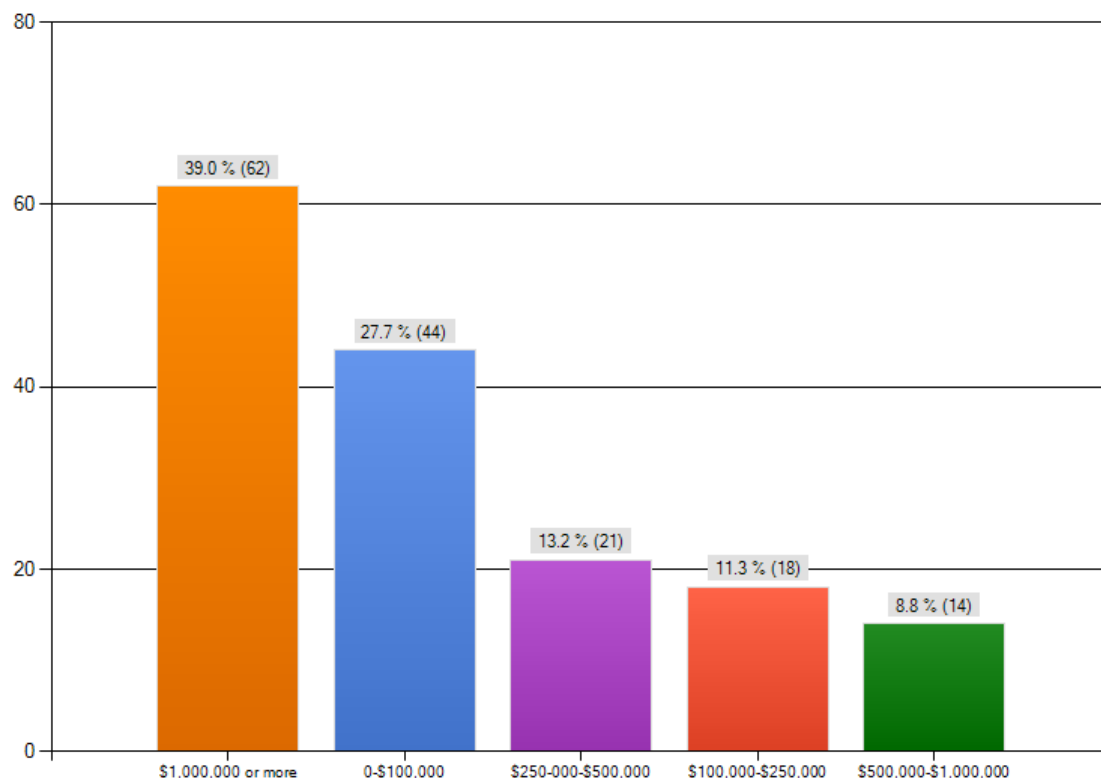
Significant economic impact

The clean energy industry represents a significant economic interest to Maryland.

Nearly 40% of surveyed businesses reported more than \$1 million in revenue in 2011.

However, the small business sector of the state's clean energy industry is notable – 27% reported less than \$100,000 in 2011 revenue.

What was your company revenue in 2011?



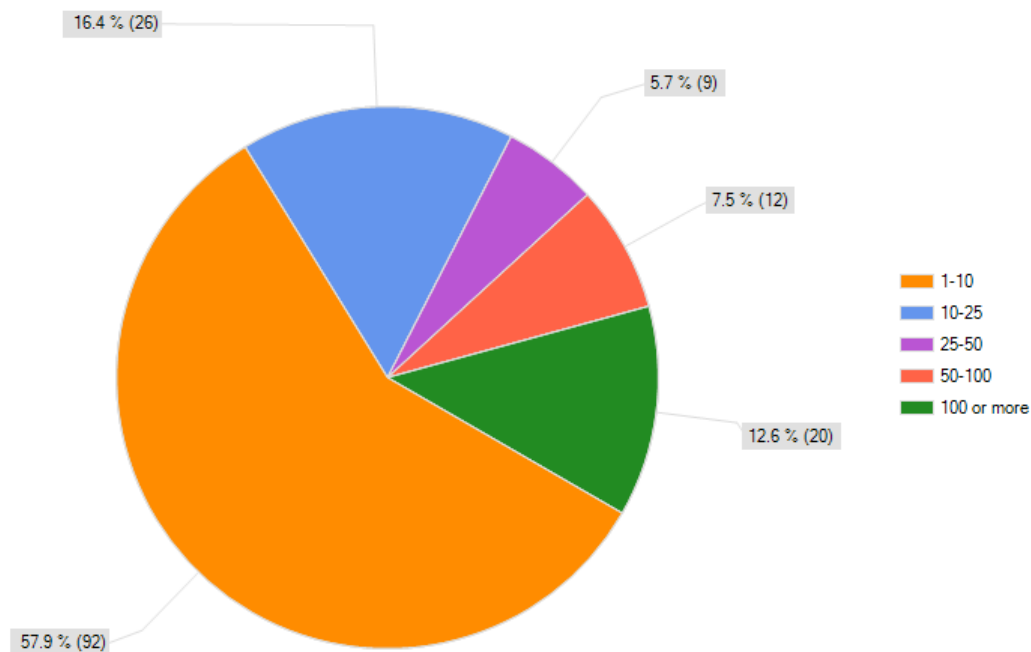
Mainly mid-sized businesses

A majority of Maryland's clean energy industry businesses are small- to medium-sized.

Nearly three-quarters of surveyed businesses employed 25 or fewer workers in 2011.

However, nearly 13 percent employed more than 100 workers in 2011.

How many workers (both full- and part-time) did you employ in 2011?



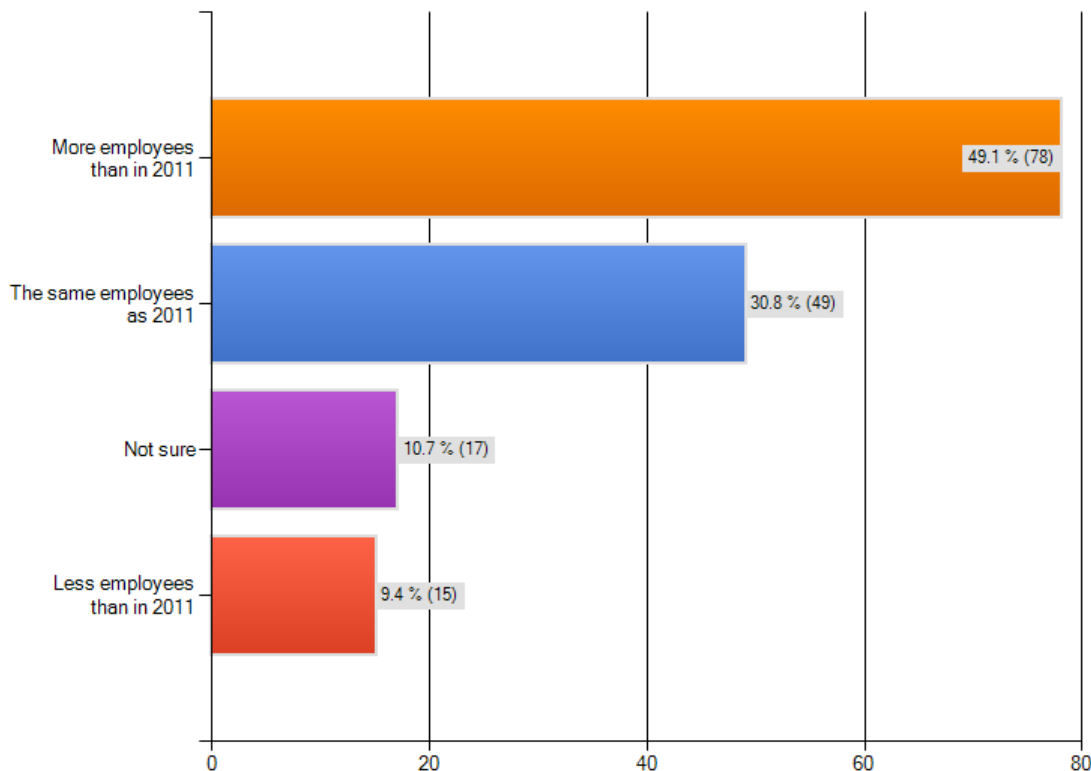
Green collar jobs growing fast

The employment outlook for Maryland's clean energy industry is strong and growing.

Nearly 50% of surveyed businesses expect to employ more workers in 2012 as compared to 2011, and an additional 31% expect to employ the same amount of workers in 2012 as in 2011.

Less than 10% of surveyed businesses expect to employ less workers in 2012 as in 2011.

Do you expect to employ more or less employees in 2012?



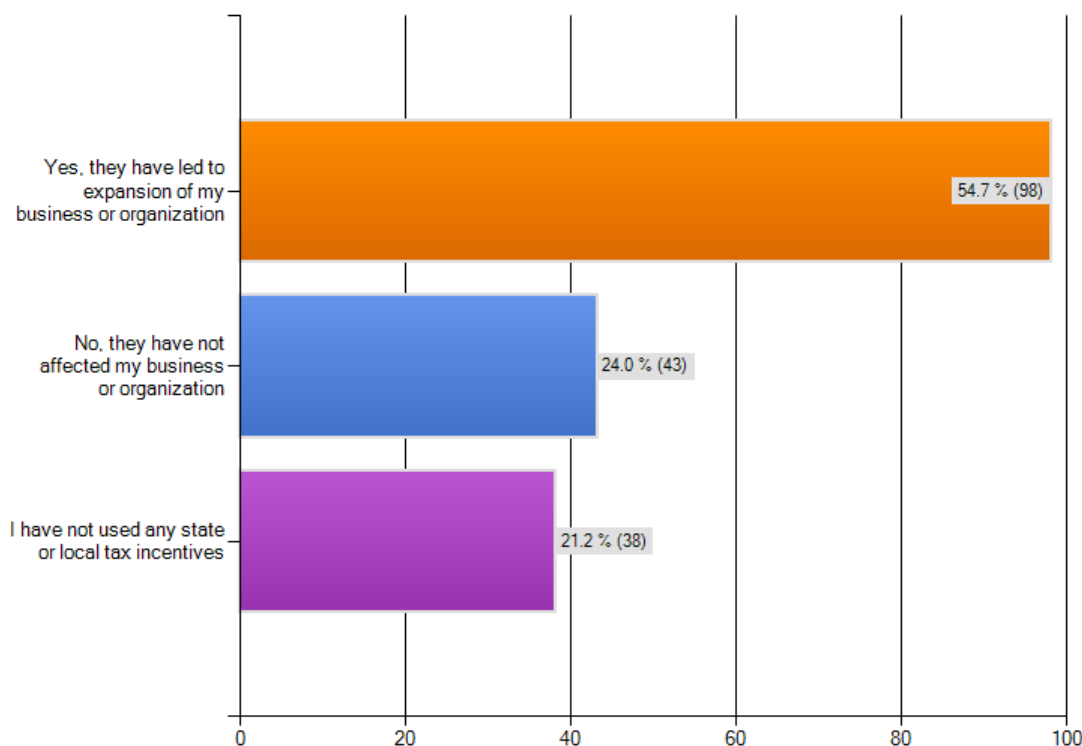
State & local policies are key

Government policy and incentives are an important driver for Maryland's clean energy industry.

Nearly 55% of all respondents said state and local policy or tax incentives have led them to expand their business.

However, 21% said they have not used state or local incentives, indicating additional outreach could return benefits.

Have Maryland's state and local policy and tax incentives directly impacted your business or organization?



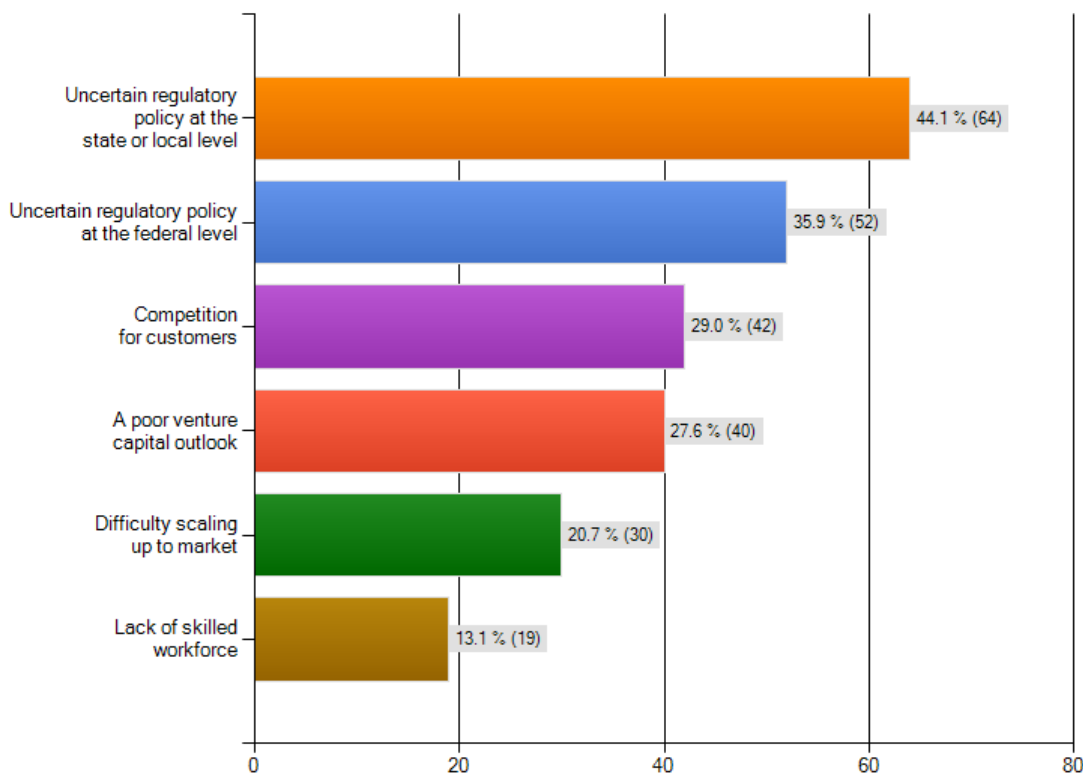
Uncertain policy a barrier to success

While state and local policy has been key to growth this far, policy uncertainty is by far biggest barrier to clean energy industry success.

Roughly 80% of businesses cited uncertain government policy as the biggest barrier to success.

Lack of a skilled workforce was the lowest-ranked barrier, indicating training programs are helping provide enough green-collar workers.

What barriers to success does your business/organization face?

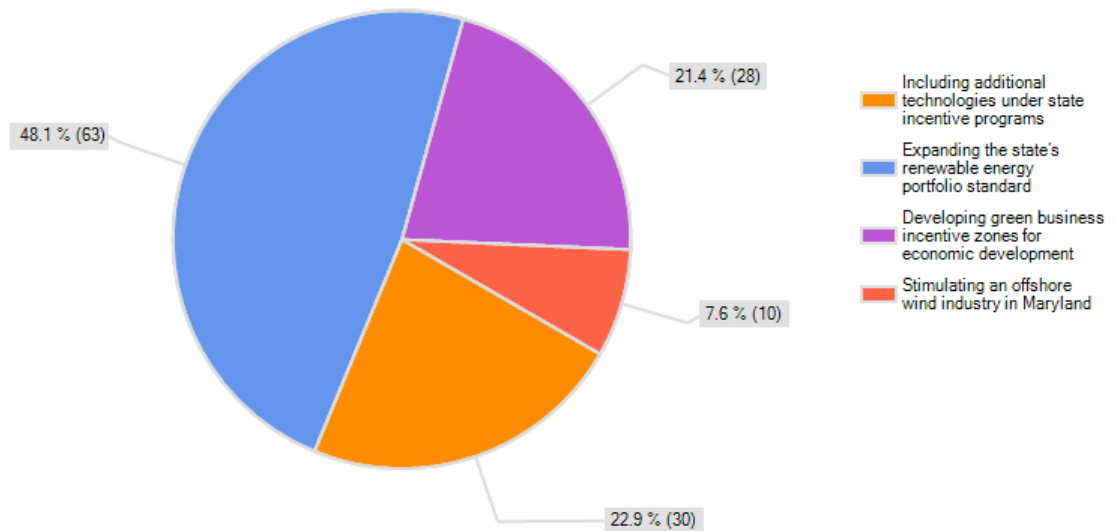


An expanded RPS is most important

Nearly half of all respondents said expanding the state's renewable energy portfolio standard was the top regulatory hurdle they would like to see addressed.

An additional 22% said they would like additional technologies to be covered by state incentive programs, and 21% wanted green business incentive zones to be developed.

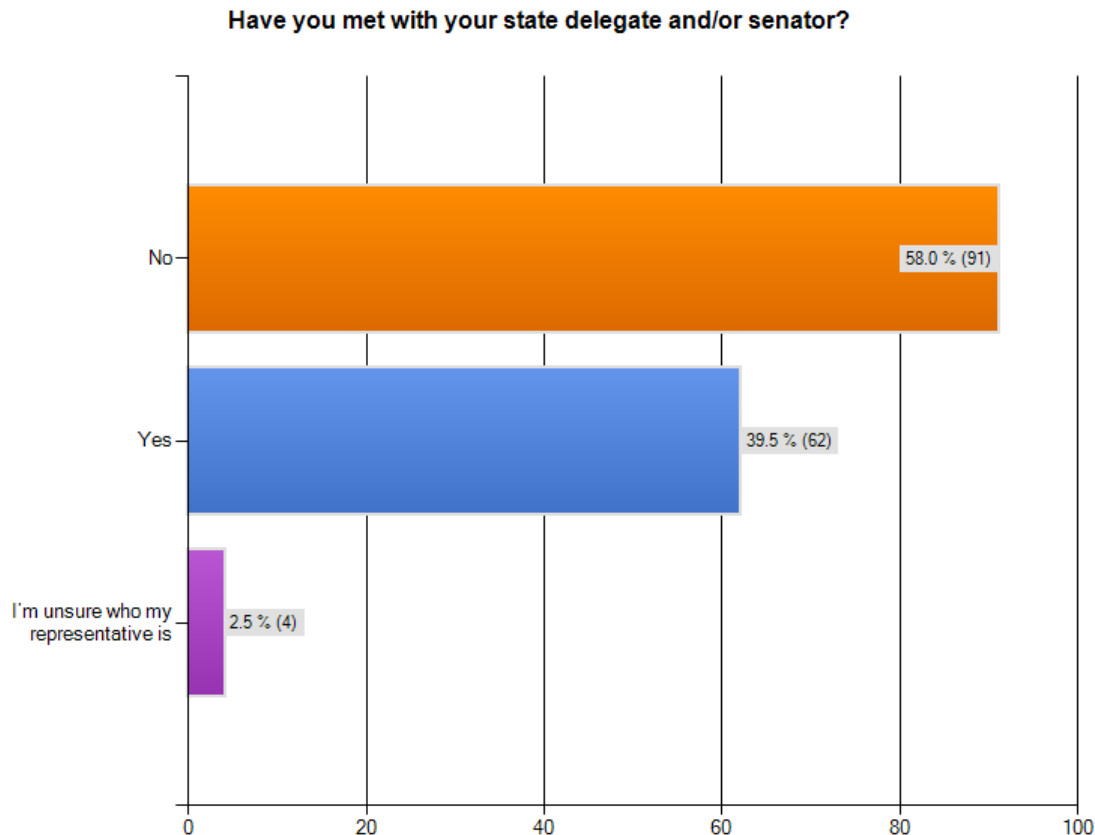
Are there any specific regulatory hurdles MCEC could help advocate for on your behalf?



Government outreach lacking

Even though government policy is key to the clean energy industry, and surveyed businesses have clear policy imperatives, respondents are not meeting with their elected officials.

58% of survey respondents have not met with their state delegate and/or senator, and an additional 2.5% were unsure who their representative is.

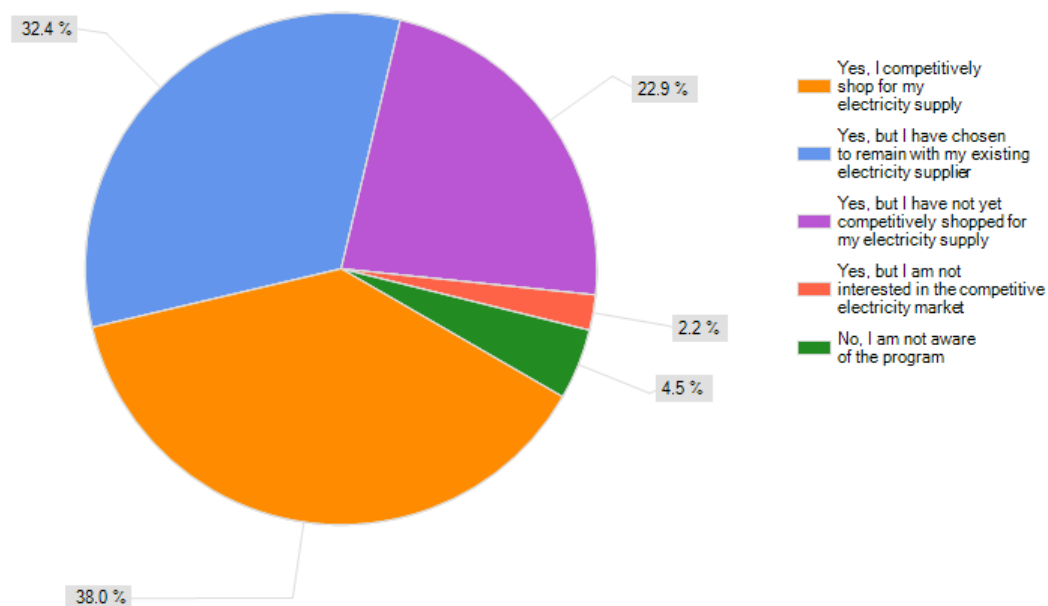


Electricity shopping lagging

Nearly every surveyed business was aware of Maryland's competitive electricity market, but an overwhelming majority aren't shopping for their electricity supply.

Two-thirds of respondents have either chosen to remain with their incumbent utility, have not yet shopped in the competitive market, or are not interested in shopping for their electricity supply.

Are you familiar with the ability of electrical consumers in Maryland to competitively shop for an alternate electricity supplier based on cost or other attributes?



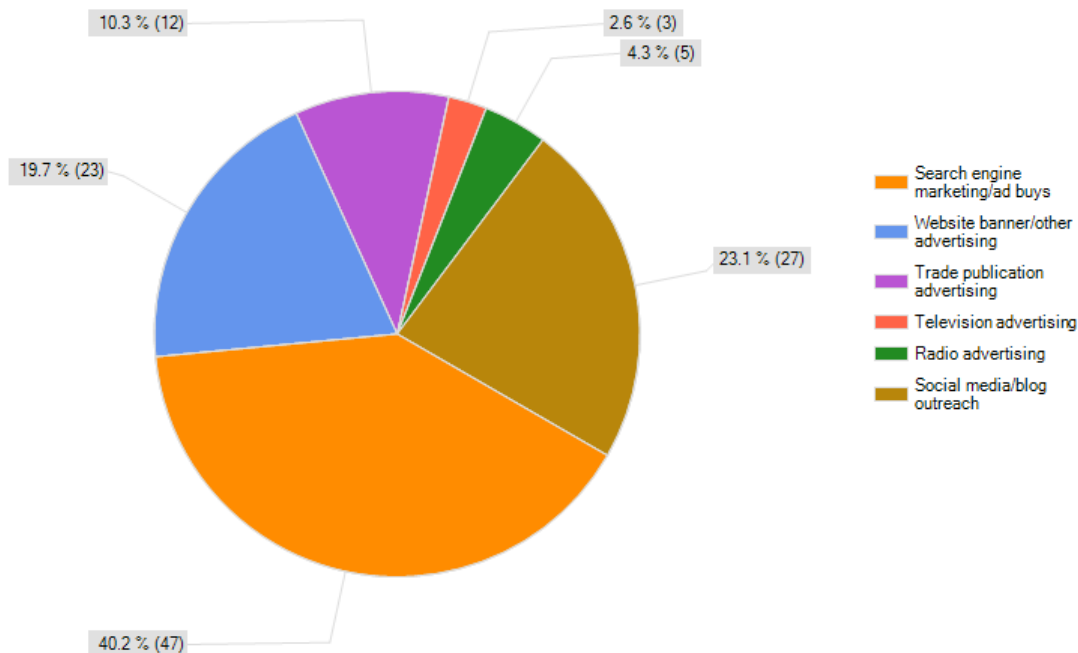
Online advertising dominates budgets

Roughly half of all surveyed businesses have annual advertising budgets below \$5,000, but online advertising dominates available spending.

40% of businesses depend on search engine marketing ads, while 20% primarily use website banners or other online ads.

23% of businesses use online word-of-mouth advertising via social media or blog outreach.

What advertising method/media does your business primarily use to connect to your target market?

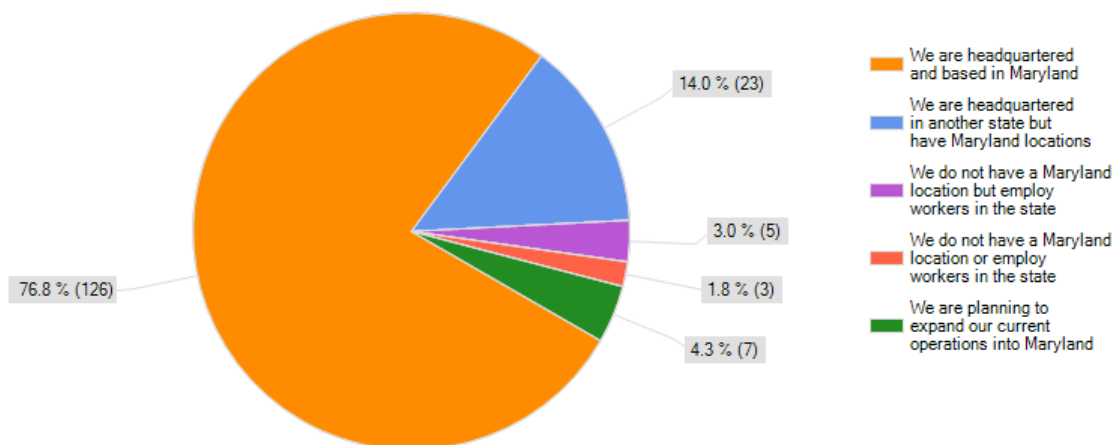


Survey respondents

78% of surveyed businesses are headquartered or based in Maryland, and 17% either employ workers or have locations in the state.

Four percent of survey respondents are planning to expand their current out-of-state operations into Maryland.

What is your company's business footprint in Maryland?



Survey methodology

- Survey was conducted among businesses registered with the MCEC in order to benchmark the state of Maryland's clean energy industry and hone future advocacy efforts.
- 179 businesses replied to the survey, and responses were limited to one reply per business.
- Survey was conducted online using SurveyMonkey, and was completed between May 1 and June 15, 2012
- For additional information, contact MCEC Executive Director Kathy Magruder at 301-738-6281 or ikm@mdcleanenergy.org