

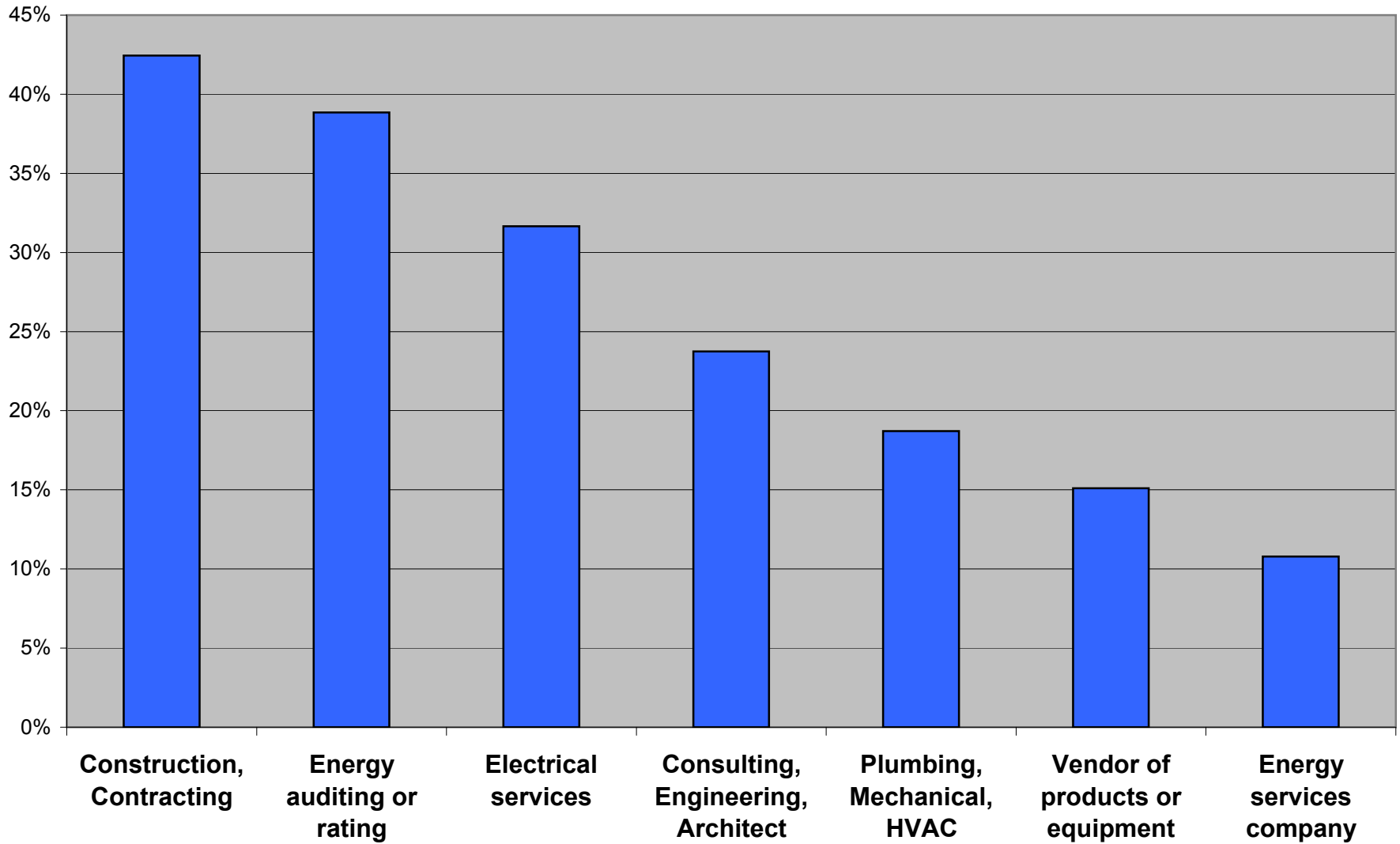
Results of Natural Resources Council of Maine Survey of Energy Efficiency Companies

According to a national study by the Pew Trust, job growth in the clean energy economy in Maine far outpaced total job growth between 1998 and 2007. From a jobs perspective, more than 40 percent of Maine's clean energy economy appears to be made up of an energy efficiency sector. To better understand Maine's energy efficiency sector, the Natural Resources Council of Maine surveyed over 1,600 businesses in July-August 2009. These companies provide a wide variety of energy efficiency services and products, including to Maine businesses in collaboration with Efficiency Maine and directly to homeowners through auditing and weatherization. Only about 1/3 focus mainly on energy efficiency activities. The rest, like many Maine businesses, offer a diversity of products and services that sometimes include energy efficiency. The survey was not sent to a random sample of businesses, so the results are highly informative but not statistically significant to a specific standard of error. Response rate was relatively robust, at around 15%.

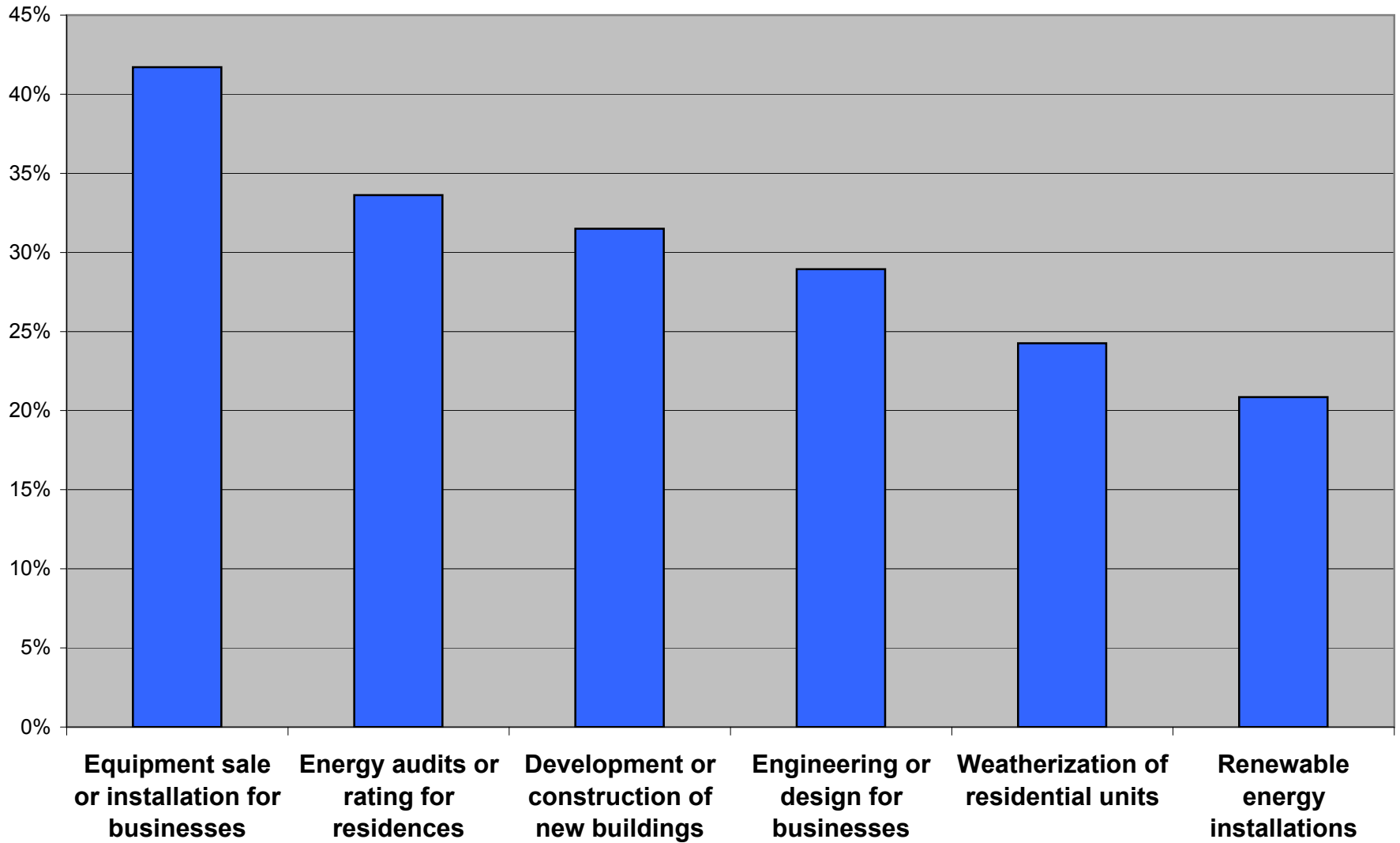
| | |
|--|------------|
| 1. Which best describes your business? | |
| Privately-owned business operating mostly in Maine | 77% |
| Privately-owned business operating regionally | 20% |
| Subsidiary or local branch of a large national (or regional) corporation | 4% |
| 2. How many years has this business been in operation? | |
| <i>Average</i> | <i>19</i> |
| one - five | 32% |
| six - ten | 12% |
| <i>Subtotal less than ten</i> | <i>44%</i> |
| eleven - fifteen | 8% |
| sixteen - twenty | 11% |
| twenty - thirty | 19% |
| thirty or more | 18% |
| <i>Subtotal more than twenty</i> | <i>37%</i> |
| 3. Please select the description below that best describes your firm's business? (Check all that apply) | |
| Construction, Contracting | 42% |
| Energy auditing or rating | 39% |
| Electrical services | 32% |
| Consulting, Engineering, Architect | 24% |
| Plumbing, Mechanical, HVAC | 19% |
| Vendor of products or equipment | 15% |
| Energy services company | 11% |
| 4. Which of the following services do you provide? (Check all that apply) | |
| Equipment sale or installation for businesses | 42% |
| Energy audits or rating for residences | 34% |
| Development or construction of new buildings | 31% |
| Engineering or design for businesses | 29% |
| Weatherization of residential units | 24% |
| Renewable energy installations | 21% |
| 5. How many workers do you currently employ in Maine in total Full Time Equivalents? | |
| <i>Average</i> | <i>20</i> |
| one - two | 52% |
| three - five | 17% |
| six - ten | 11% |
| eleven - twenty | 9% |
| twenty one - thirty | 4% |
| thirty one - 100 | 5% |
| 100 or more | 2% |
| 6. What portion of your business activity in Maine relates to energy efficiency products or services? | |
| More than 65% | 28% |
| Between 33 - 65% | 23% |
| Less than 33% | 40% |
| Not sure | 9% |
| 7. If you provide services, approximately how many units (e.g. households, businesses) do you directly provide energy efficiency services to in average per year? | |
| <i>Average</i> | <i>94</i> |
| 1 - 25 | 60% |
| 26 - 50 | 16% |
| 51 - 75 | 5% |
| 76 - 100 | 7% |
| over 100 | 12% |

| | | |
|--|--|-----|
| 8. What has been your business's employment experience over the past year (since July 2008), specifically in relation to employees working on energy efficiency activity? | | |
| Employment decreased | | 23% |
| Remained the same | | 54% |
| Increased by 5 employees (FTE) or less | | 7% |
| Increased by more than 5 employees | | 1% |
| <i>Subtotal increase</i> | | 8% |
| Unsure, or prefer not to answer | | 8% |
| 9. How do you expect your firm's employment to change in the next year? | | |
| Likely to increase by more than 5 employees | | 3% |
| Likely to by 5 employees (FTE) or less | | 12% |
| Likely to stay the same | | 59% |
| Likely to decrease | | 10% |
| Unsure, or prefer not to answer | | 9% |
| 10. What was your company's gross revenues in the fiscal year that includes 2008? | | |
| Less than \$250,000 | | 43% |
| \$250,000 - \$1,000,000 | | 21% |
| \$1,000,000 - \$10,000,000 | | 18% |
| Greater than \$10,000,000 | | 6% |
| 11. What are the top three factors that you believe would affect your energy efficiency business activity in Maine in 2009-2010 (e.g. rising energy prices, new efficiency programs/incentives, availability of skilled workers)? | | |
| Need for incentives | | 34% |
| Rising energy costs | | 32% |
| Need better programs | | 16% |
| Need better education | | 12% |
| 12. Did you follow the legislative activity this year involving energy efficiency programs and policies in the Maine State Legislature? | | |
| Yes, pretty closely. | | 26% |
| A little – but not as much as I would have liked. | | 40% |
| Not really – but I knew something was being discussed. | | 17% |
| No – but I would like to be more involved. | | 5% |
| No, I wasn't interested. | | 3% |
| 13. Are you aware of the money that will be available to Maine as part of the federal economic stimulus plan for energy efficiency, weatherization and workforce development? | | |
| Yes | | 63% |
| No | | 31% |
| 14. Do you expect to see increased business as a result of the energy efficiency stimulus money coming into the state? | | |
| Yes, potentially quite a bit | | 12% |
| Yes, somewhat | | 45% |
| No | | 19% |
| Not Sure | | 23% |
| 15. Do you belong to any of the following organizations? | | |
| Association of Energy Engineers | | 6% |
| Association of Energy Services Professionals | | 0% |
| E2 Tech Council | | 3% |
| Maine Association of Building Efficiency Professionals | | 19% |
| National Association of Energy Service Companies | | 1% |
| U.S. Green Building Council, Maine Chapter | | 11% |
| For more information, contact Dylan Voorhees at NRCM (207-430-0112 or dylan@nrcm.org) | | |

Business Type



Business Services or Activities



Do you expect to see increased business as a result of the energy efficiency stimulus money coming into the state?

