

Results of the Residential Energy Tax Credit Participant Survey

Final Report:

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Executive Summary

Background

The Oregon State Legislature created the Residential Energy Tax Credit (RETC) in 1977 to encourage the use of renewable resources to meet home energy needs. As a result of new energy saving technologies that have become widely available, the Oregon Legislature expanded the Residential Energy Tax Credit in 1997 to include highly efficient home appliances.

Since 1978, the program has awarded more than 87,000 tax credits to Oregon households for installing renewable resource systems and for purchasing energy-efficient appliances and alternative fuel vehicles. Participation in the RETC program has grown sharply since home appliances became eligible. In 2001 alone, the program awarded over 20,000 tax credits for energy efficient appliances. This report presents the results of a participant satisfaction survey conducted in November 2002 by the University of Oregon's Community Planning Workshop (CPW).

Purpose and methods

The purpose of this report is to evaluate participant satisfaction with the Residential Energy Tax Credit program. CPW accomplished this through a mailed survey to randomly selected program participants. The Oregon Office of Energy's priority was to survey tax credit recipients who purchased appliances in the last two years.

The primary purpose of the survey was to learn about recent RETC participants' experience with the RETC program. Specifically, the survey focused on the following issues:

- What motivated the participants to take part in the program;
- How participants learned about the RETC program;
- Participants' satisfaction with the process of obtaining the tax credit and service they received from OOE;
- Participants' satisfaction with their energy efficient purchase and how they chose to dispose of their old appliances, and;
- Whether participants would be likely to take part in RETC again and what they would like to see changed.

CPW distributed surveys by mail to 1,500 randomly selected individuals who participated in the program between January 2000 and December 2001. A total of 32,810 households participated in the Residential Energy Tax Credit program during this two-year period. Table S-1 summarizes the survey sample and response rates. A total of

112 surveys were undeliverable, for an actual sample size of 1,388. CPW received 564 valid responses, which yields a 40.6% response rate.

Table 1-1. Summary of survey sample and response

Sample	Total
Total Sample Size	1,500
Number Undeliverable	112
Number of Valid Responses	564
Response Rate	40.6%

Source: RETC Participant Survey, CPW, 2002

Survey results

This section summarizes key findings from the Residential Energy Tax Credit program participant survey.

Characteristics of survey respondents

- About 51% of the survey respondents were female and 49% were male. The average age of survey respondents was about 54 years while the median age was 45 years. Respondents were aged 26 to 91.
- The average household size was 2.48 persons while the median household size was 2.0 persons. Households ranged in size from 1 to 10 persons. A majority (53%) of households had two persons. Less than 12% of survey respondents live in single-person household.
- About 38% of survey respondents reported having children. The average number of children in households with children was 1.9; the median number was 2.0.

Participation in the Residential Energy Tax Credit program

- Nearly 85% of respondents indicated they received information on the Residential Energy Tax Credit program from the retailer where they purchased their appliance. News/advertisements were the second most frequently cited response; 16% of respondents indicated getting information from this source. The Oregon Office of Energy Web site received the lowest percentage of respondents at 1.2%.
- Over 63% of survey respondents indicated that the Residential Energy Tax Credit program influenced their decision with respect to which appliance they chose to purchase.
- When asked about reasons for participating in the RETC, nearly 87% wanted lower utility bills, 64% expressed concern about the environment, and 50% indicated quality was a factor.
- More than one-third of the respondents reported purchasing a clothes washer, while about 28% purchased a refrigerator.

About 20% purchased dishwashers, and just fewer than 10% purchased a water heater.

Satisfaction with program administration

- Nearly 83% of survey respondents rated the application process “easy” or “very easy.” Just over 2% of respondents rated the application process as “difficult” or “very difficult.”
- More than 85% of respondents received an application at the appliance store or department where they purchased their appliance.
- A small percentage of respondents (4%) requested additional information about the program. Respondents generally gave OOE staff favorable ratings for employee service.
- A majority (53%) submitted their application within 30 days of their purchase. Twenty-two percent waited between 30 and 60 days, while six percent waited 60 to 90 days. Over 19% waited 90 or more days.
- Few respondents reported their application was processed in less than one week; while over 21% indicated it took one to two weeks. The most frequently cited duration was three to four weeks (about 40%).
- Seventy-seven percent of survey respondents indicated they were satisfied with the length of time it took OOE to process their RETC application. Just over 20% indicated they were neither satisfied nor dissatisfied, while a small percentage (2.1%) indicated they were dissatisfied.
- About 8.5% of survey respondents indicated they had visited the OOE Website. The results indicate the majority of respondents that had visited the OOE Website rated it as either “good” or “excellent.”

Satisfaction with appliance

- Nearly half of the survey respondents indicated they paid more for their energy efficient appliance. About 36% said they did not pay more, and over 15% indicated they did not know whether they paid more for their appliance.
- Of those respondents that indicated they paid more for their energy-efficient appliance, about 22% of respondents indicated their appliance cost \$0-\$100 more, while 34% paid \$101-\$200 more. Notably, 45% of respondents paid an additional \$200 or more for their appliance.
- Nearly 89% of respondents indicated they did feel their appliance was worth the additional cost.
- Less than 25% of the respondents noticed a reduction in their electric bill. Notably, 35% had not noticed a change in the

electricity bill and 40% indicated that they did not know if their appliance had reduced their electric bill.

- Over 80% of respondents that purchased clothes washers or dishwashers indicated that water conservation was a factor in their purchase.
- About 39% of respondents indicated they recycled their appliance, while 29% indicated they sold or traded in their appliance. Less than 11% indicated they disposed (threw away) of their appliance.
- Nearly 50% indicated that \$50-\$99 would be sufficient incentive to participate in the RETC program. Just over 20% indicated that a credit or \$50 or less would be sufficient incentive.
- Over 97% survey respondents indicated they would use the Residential Energy Tax Credit program again.

Conclusions and recommendations

The survey results generally suggest that program participants are satisfied with the Residential Energy Tax Credit program. This observation includes both the program and its energy conserving mission, as well as the program administration and OOE staff.

Following are several conclusions regarding the Residential Energy Tax Credit program.

- The program appears to attract homeowners. This is not surprising in many respects; many renters do not own their appliances.

Recommendation: The OOE should consider approaches to market the RETC program to renters.

- A large majority of program participants are informed about the tax credit through their retailer. This suggests that the program's approach of working through retailers is both appropriate and effective. One drawback of this approach is that consumers are generally unaware of the program prior to purchasing their appliance, which may make selecting an appliance more difficult.

Recommendation: The OOE should consider approaches to inform consumers of the program. The logistics of this are difficult, and may explain why the OOE has not engaged in a broader marketing and outreach effort.

- The OOE Website appears to have untapped potential. A small percentage of respondents reported getting information about the RETC program from the OOE Website.

Recommendation: Explore ways to promote higher use of the OOE Website.

- The RETC application process was generally rated as easy. According to survey respondents, applications are processed in a reasonable amount of time. The only issues with the application process are the large volume of applications OOE receives near tax season and the significant number of applicants that wait 90 or more days from the date of purchase to process their application.

Recommendation: Reinforce the urgency of processing applications as soon as possible after purchase. OOE should look for ways to speed up the submission of applications.

- The RETC program appears to provide sufficient incentive to consumers to purchase appliances that are both energy efficient and higher quality. In fact, the tax credit is sufficient incentive for participants to spend more for a quality, energy efficient appliance.

Recommendation: None.

- Only one-quarter of RETC participants reported they experienced a noticeable decrease in their monthly electric bill. This suggests that utility bill savings may only be a part of the incentive for participating in the program. It is important to note that this reflects respondent perceptions and not actual energy savings. Program data provided by OOE suggest that the cumulative energy savings from the program is significant.

Recommendation: Take steps to better inform program participants about energy savings at the time of purchase. The marginal savings from an appliance may not be noticeable on individual household's monthly utility bills—and will depend on their old appliance.

In summary, perhaps the most telling statistic is that 97% of program participants would use the program again. This suggests, that the structure and administration of the program is effective—at least from the participant perspective. The survey results suggest the program administration is effective, but that a few minor changes may improve specific elements of the program.

Chapter 1

Introduction

Background

The Oregon State Legislature created the Residential Energy Tax Credit (RETC) in 1977 to encourage the use of renewable resources to meet home energy needs. As a result of new energy saving technologies that have become widely available, the Oregon Legislature expanded the Residential Energy Tax Credit in 1997 to include highly efficient home appliances and in 1999 to include fuel cells. In 2002, high efficiency heat pump systems, furnaces, and boilers were added to the program.

Since 1978, the program has awarded more than 87,000 tax credits to Oregon households for installing renewable resource systems and for purchasing energy-efficient appliances and alternative fuel vehicles. The Oregon Office of Energy (OOE) estimates that in 2001 approximately 60.8 million kilowatt hours, 1.1 million therms, and 11,000 gallons of oil were saved as a result of the residential energy tax credit program.

Participation in the RETC program has grown sharply since home appliances became eligible. In 2001 alone, the program awarded over 20,000 tax credits for energy efficient appliances. This report presents the results of a participant satisfaction survey conducted in November 2002 by the University of Oregon's Community Planning Workshop (CPW).

Purpose and methods

The purpose of this report is to evaluate participant satisfaction with the Residential Energy Tax Credit program. This report is *not* a full evaluation of the RETC program. It does not address whether the program is meeting its broader goals. Rather, the survey focused on the implementation of the RETC and customer satisfaction with the program.

The primary research tool for this study was a mailed survey to randomly selected program participants. The Oregon Office of Energy's priority was to survey tax credit recipients who purchased appliances in the last two years. The primary purpose of the survey was to learn about recent RETC participants' experience with the RETC program. Specifically, the survey focused on the following issues:

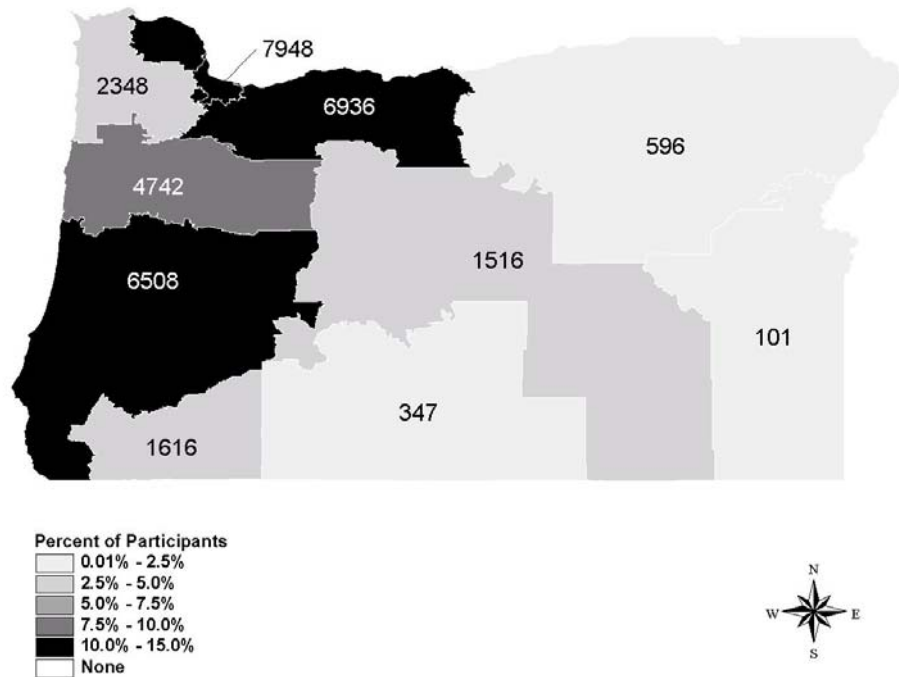
- What motivated the participants to take part in the program;
- How participants learned about the RETC program;

- Participants' satisfaction with the process of obtaining the tax credit and service they received from OOE;
- Participants' satisfaction with their energy efficient purchase and how they chose to dispose of their old appliances, and;
- Whether participants would be likely to take part in RETC again and what they would like to see changed.

CPW developed survey questions based upon background research and discussions with OOE Staff. CPW expanded upon those discussions, and developed questions and responses in the format most appropriate for the type of information to be gathered. The survey also included questions to allow analysis of responses by demographic characteristics. A copy of the survey instrument is presented in Appendix A.

CPW distributed the surveys by mail. CPW distributed the surveys to 1,500 randomly selected individuals who participated in the program between January 2000 and December 2001. A total of 32,810 households participated in the Residential Energy Tax Credit program during this two-year period. Map 1-1 shows the location of 2000 and 2001 program participants by 3-digit zip code area in Oregon.

Map 1-1. RETC program participants, by 3-digit zip code area 2000-2001



CPW began the survey administration by sending a postcard to selected respondents informing them they would receive a survey in the near future. The postcard was followed about one week later with an initial survey mailing that consisted of a cover letter describing the nature and importance of the survey along with the confidential nature of the research, a copy of the survey, and a postage-paid return envelope. Non-respondents received a follow-up postcard approximately ten days later, reminding them to complete the survey. For those that still had not responded, a second survey was mailed approximately one week later, containing a cover letter, second copy of the survey, and a postage-paid return envelope.

Table 1-1 summarizes the survey sample and response rates. A total of 112 surveys were undeliverable, for an actual sample size of 1,388. CPW received 564 valid responses, which yields a 40.6% response rate.

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Sample	Total
Total Sample Size	1,500
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Source: RETC Participant Survey, CPW, 2002

CPW tabulated and analyzed survey responses using the Statistical Package for the Social Sciences (SPSS) computer program. SPSS allowed CPW to conduct statistical analysis and cross-tabulation of survey responses.

Organization

The remainder of this report is organized as follows:

Chapter 2, Characteristics of Survey Respondents summarizes demographic information of individuals that responded to the survey.

Chapter 3, Analysis of Survey Results presents a detailed discussion of the survey results included selected cross-tabulations and related analysis.

This report also includes two appendices.

Appendix A, Survey Instrument presents all materials associated with the administration of the Residential Energy Tax Credit survey.

Appendix B, Transcript of Written Survey Comments
presents a verbatim transcript of written comments provided by
survey respondents.

Chapter 2

Characteristics of Survey Respondents

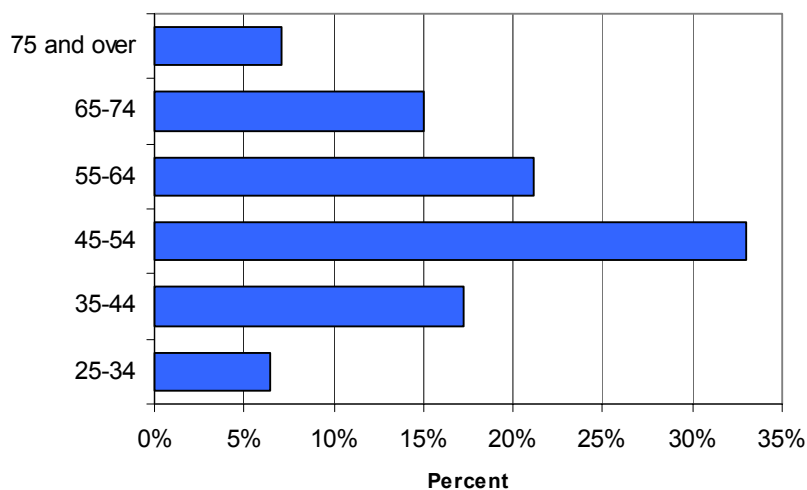
One of the objectives of the survey was to find out more about the characteristics of individuals that participate in the residential energy tax credit program. In this chapter, we describe the demographic characteristics of individuals that responded to the Residential Energy Tax Credit survey that CPW administered during November and December of 2002. Key variables include age, gender, household size, housing tenure, and location of residence.

Characteristics of survey respondents

About 51% of the survey respondents were female and 49% were male. Figure 2-1 shows the age of survey respondents. The average age of survey respondents was about 54 years while the median age was 45 years. Respondents were age 26 to 91.

Nearly one-third of survey respondents were between the ages of 45 and 54. The second largest age group was 55-64—about 21% of respondents were in this age group.

Figure 2-1. Age of survey respondents



Source: RETC Participant Survey, CPW 2002

The survey also asked respondents about household size and presence of children. The average household size was 2.48 persons while the median household size was 2.0. Households ranged from 1 to 10

persons. A majority (53%) of respondents had two persons. Less than 12% of survey respondents live in single-person household.

Table 2-1. Household size of survey respondents

Size	Number	Percent
1	61	11.5%
2	281	52.9%
3	71	13.4%
4	76	14.3%
5	23	4.3%
6	11	2.1%
7	5	0.9%
8	1	0.2%
9	1	0.2%
10	1	0.2%
Total	531	100.0%

Source: RETC Participant Survey, CPW 2002

About 38% of survey respondents reported having children. The average number of children in households with children was 1.9; the median number was 2.0. Over 81% of the households with children had either one or two children.

Table 2-2 shows the location of survey respondents and program participants at the 3-digit zip code level. CPW received survey responses from 150 different zip codes in Oregon. We compare the zip areas of survey respondents with the location of program participants to validate whether the responses are consistent with participants. A comparison of the two data sets shows that the percentage of survey respondents by zip code is relatively comparable to the percentage of total program participants. Over 32,600 households that participated in the Residential Energy Tax Credit program had current Oregon addresses.

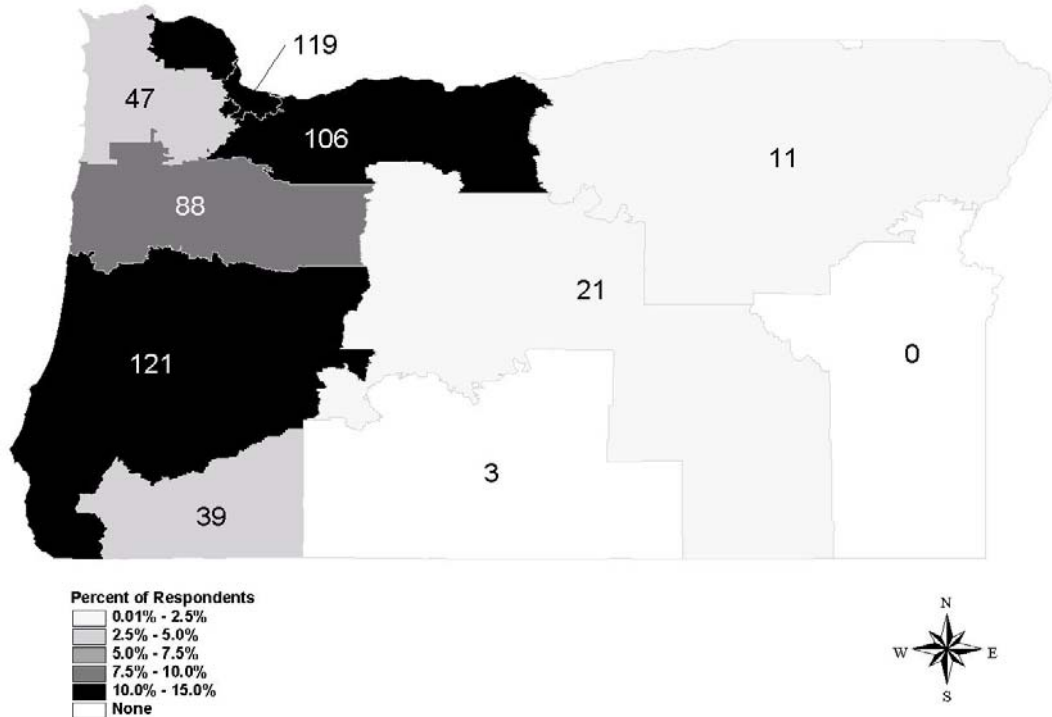
Map 2-1 shows the geographic origin of survey respondents. We received completed surveys from all regions of the state except southeastern Oregon. This result is relatively consistent with the geographic distribution of all program participants in 2000 and 2001.

Table 2-2. Location of survey respondents and program participants

3-Digit Zip	Survey respondents		Total participants	
	Number	Percent	Number	Percent
970	106	19.1%	6,936	21.2%
971	47	8.5%	2,438	7.5%
972	119	21.4%	7,948	24.3%
973	88	15.9%	4,742	14.5%
974	121	21.8%	6,508	19.9%
975	39	7.0%	1,616	4.9%
976	3	0.5%	347	1.1%
977	21	3.8%	1,516	4.6%
978	11	2.0%	596	1.8%
Total	555	100.0%	32,647	100.0%

Source: RETC Participant Survey, CPW 2002

Map 2-1. Geographic distribution of survey respondents



Chapter 3

Analysis of Survey Results

This chapter presents the survey results. It is organized into the following sections consistent with the survey instrument:

- Participation in the Residential Energy Tax Credit program
- Satisfaction with program administration
- Satisfaction with appliance

Appendix A contains a copy of the survey instrument.

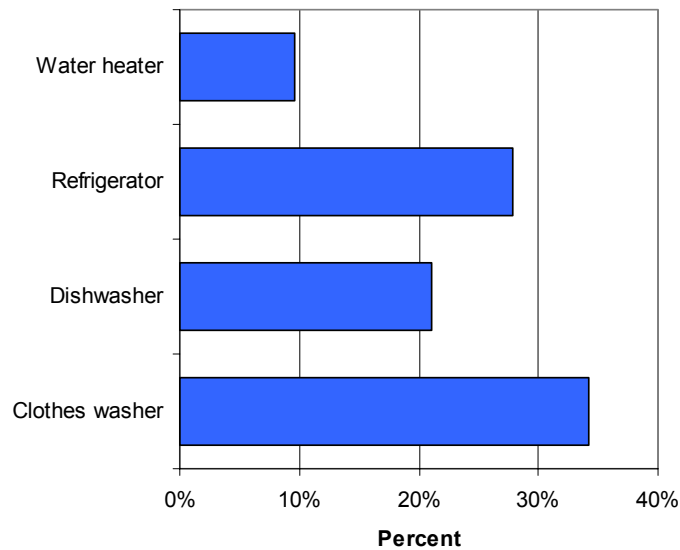
CPW also analyzed a number of the questions by age and income level. The intent here was to evaluate whether respondents from different age or income groups have different values.

Participation in the Residential Energy Tax Credit program

The survey instrument began by asking a series of questions about respondents' participation in the Residential Energy Tax Credit program.

The survey asked respondents to indicate what type(s) of appliances they purchased. Figure 3-1 shows that respondents purchased a variety of appliances. More than one-third of the respondents reported purchasing a clothes washer, while about 28% purchased a refrigerator. Just over 20% purchased dishwashers, and just fewer than 10% purchased a water heater.

Figure 3-1. Type of appliance purchased by survey respondents

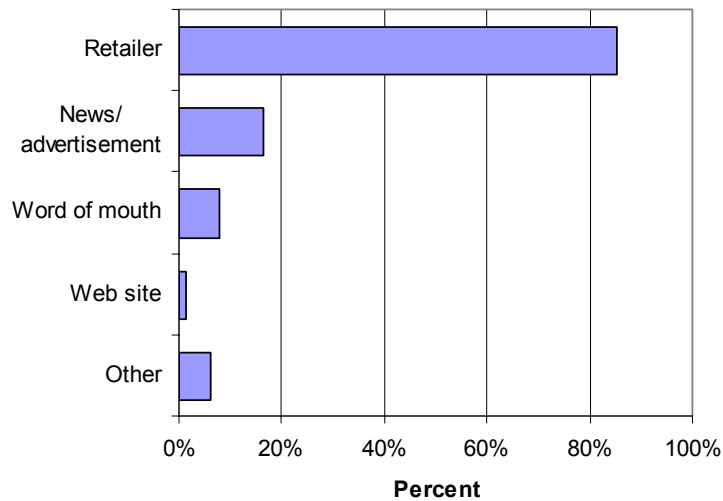


Source: RETC Participant Survey, CPW 2002

Figure 3-2 shows where respondents received information about the Residential Energy Tax Credit program. Nearly 85% of respondents indicated they received information from the retailer where they purchased their appliance. This is not surprising, more than 95% of respondents indicated that the retailer they purchased their appliance from informed them about the RETC program.

News/advertisements were the second most frequently cited response, but only 16% of respondents indicated getting information from this source. The Oregon Office of Energy Web site received the lowest percentage of respondents; only 1.2% of respondents indicated they were informed about the program from the OOE Web site.

Figure 3-2. Source of information about RETC program as reported by survey respondents



Source: RETC Participant Survey, CPW 2002

Over 63% of survey respondents indicated that the Residential Energy Tax Credit program influenced their decision with respect to which appliance they chose to purchase. Table 3-1 shows that a higher percentage of respondents the purchased water heaters and dishwashers reported that the RETC influenced their purchase decision.

Table 3-1. Type of appliance by whether the RETC influenced their purchase decision

Type of appliance	No	Yes	Total
Clothes washer (n=193)	33%	67%	100%
Dishwasher (n=118)	31%	69%	100%
Refrigerator (n=155)	35%	65%	100%
Water heater (n=53)	26%	74%	100%
Total (n=554)	38%	62%	100%

Source: RETC Participant Survey, CPW 2002

The survey request that respondents indicate reasons why the RETC program influenced their purchase decision. The results are shown in Table 3-2.

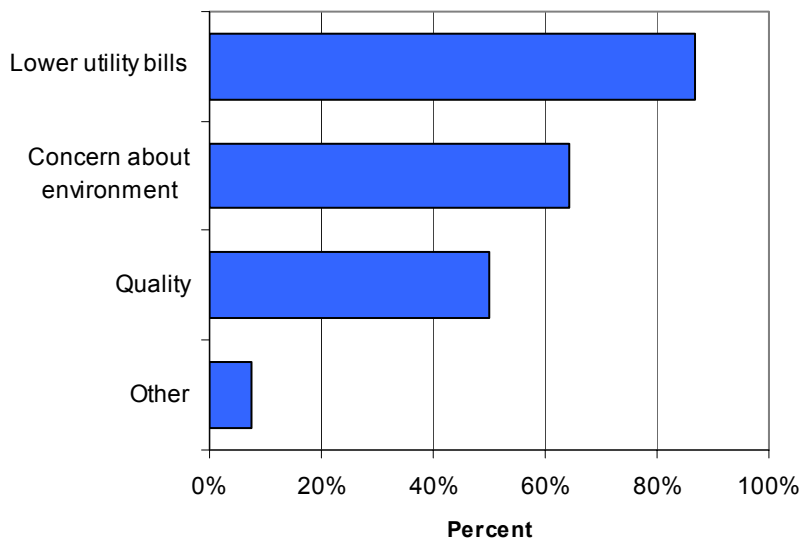
Table 3-2. Reasons why the RETC influenced respondents purchase decision

Reason	Number	Percent
Additonal incentive	20	7.1%
Reduced cost	99	35.4%
Encourage efficiency	50	17.9%
Lower taxes	30	10.7%
Multiple reasons	43	15.4%
Lower utility bills	16	5.7%
Other	19	6.8%
Detemined brand choice	3	1.1%
Total	280	100.0%

Source: RETC Participant Survey, CPW 2002

The survey asked respondents to indicate the reasons they were interested in higher efficiency appliances. Figure 3-3 shows that nearly 87% wanted lower utility bills, 64% expressed concern about the environment, and 50% indicated quality was a factor. A small percentage of respondents listed other reasons.

Figure 3-3. Reasons for interest in higher efficiency appliance



Source: RETC Participant Survey, CPW 2002

Respondents could indicate more than one appliance they had purchased that was eligible for the Residential Energy Tax Credit during 2000 and 2001. Survey results show that over 17% of respondents had purchased more than one appliance during the two-year analysis period.

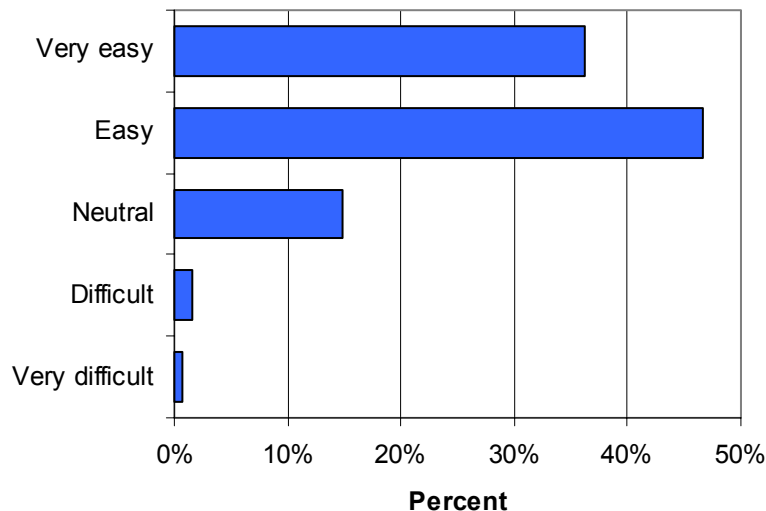
Analysis of the Residential Energy Tax Credit provided to CPW by the Oregon Office of Energy shows that 2,245 households had received a tax credit for two or more appliances. This equates to about 6.8% of all households that received tax credits during 2000 and 2001. The survey results show that a higher percentage of respondents had received more than one tax credit. These results suggest that households that have used the program more than once were more likely to respond to the survey.

Satisfaction with program administration

One of the objectives of the survey was to gather program participant's perceptions on how the Residential Tax Credit program is administered. The survey instrument included 10 questions that addressed program administration.

Figure 3-4 shows respondent's perceptions of the ease of applying for a Residential Energy Tax Credit. The results are favorable: nearly 83% of survey respondents rated the application process "easy" or "very easy." Just over 2% of respondents rated the application process as "difficult" or "very difficult."

Figure 3-4. Respondent perceptions of ease of applying for a Residential Energy Tax Credit



Source: RETC Participant Survey, CPW 2002

OOE staff were interested in participants' opinions about the application process and where participants get information and application materials. Table 3-3 shows that over 85% of respondents received an application at the appliance store or department where they purchased their appliance.

Table 3-3. Location where respondents received RETC application

Location	Number	Percent
Appliance store or department	464	85.5%
Office of Energy website	28	5.2%
Mail	24	4.4%
Phone	7	1.3%
Other	20	3.7%
Total	543	100.0%

Source: RETC Participant Survey, CPW 2002

Only 4% of survey respondents indicated they sought additional information on the Residential Energy Tax Credit program from an Office of Energy employee. Of those, over 40% sought information on how to document their purchase, 33% wanted more information about the RETC program, and the remainder addressed a variety of issues.

The survey asked those respondents that indicated they had sought additional information from OOE employees to rate their experience on a number of characteristics (see Table 3-4). The respondent ratings are generally excellent and good. Readers should use caution in interpreting these results, however; only 19 respondents responded to these questions.

Table 3-4. Survey respondent rating of OOE employee service

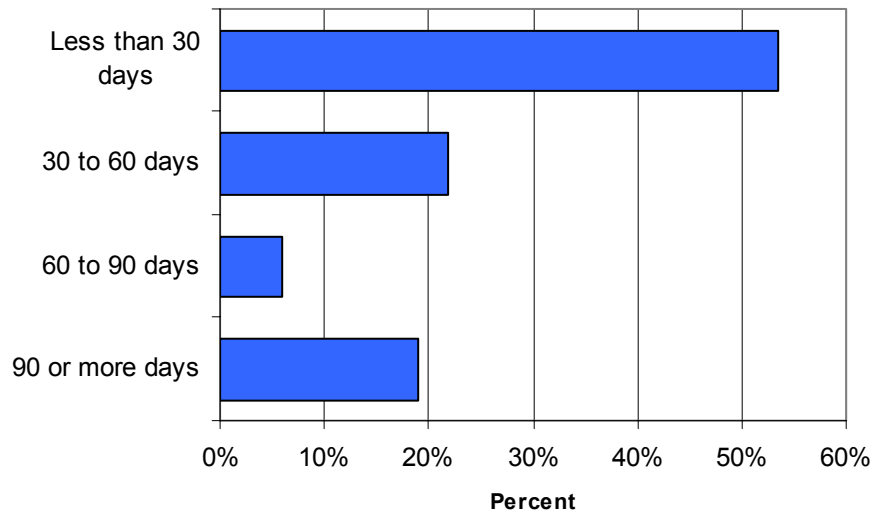
Characteristic	Excellent	Good	Average	Below Average	Poor
Courtesy (n=19)	47.4%	31.6%	15.8%	5.3%	0.0%
Helpfulness (n=19)	47.4%	26.3%	15.8%	10.5%	0.0%
Knowledge (n=19)	47.4%	26.3%	10.5%	15.8%	0.0%
Timeliness (n=19)	42.1%	26.3%	15.8%	15.8%	0.0%

Source: RETC Participant Survey, CPW 2002

OOE staff expressed an interest in finding out how long program participants wait between the time they purchase their appliance and when they submit their application for the Residential Energy Tax Credit.

A majority (53%) submitted their application within 30 days of their purchase (see Figure 3-5). Twenty-two percent waited between 30 and 60 days, while six percent waited 60 to 90 days. Notably, 19% waited 90 or more days. It is likely that these respondents purchased their appliance and then waited until tax season to complete their RETC application.

Figure 3-5. Length of time between when respondent purchased appliance and submitted RETC application



Source: RETC Participant Survey, CPW 2002

OOE staff were interested in the relationship between the length of time program participants wait to submit their applications and the quarter in which applications were submitted. Table 3-5 shows the quarter when RETC applications were submitted for survey respondents and for all applicants during 2000 and 2001. The results show some interesting differences, although the 20% of survey respondents that did not remember when they submitted their application makes comparisons difficult. Over 65% of the 32,810 program participants (shown in the *all applicants* column of Table 3-4) during 2000 and 2001 submitted their applications during the 3rd and 4th quarters (July through December). By contrast, about 50% of survey respondents indicated they submitted their applications during the 1st and 2nd quarter (January through June).

Table 3-5. Quarter when RETC applications were submitted

Quarter	Survey Respondents		All Applicants	
	Number	Percent	Number	Percent
1st Quarter	108	22.5%	5,612	17.1%
2nd Quarter	133	27.8%	5,593	17.0%
3rd Quarter	93	19.4%	10,054	30.6%
4th Quarter	51	10.6%	11,551	35.2%
Do not know	94	19.6%	na	na
Total	479	100.0%	32,810	100.0%

Source: RETC Participant Survey, CPW 2002

Table 3-6 shows the length of time the Office of Energy took to process RETC applications as reported by survey respondents. Few respondents

reported their application was processed in less than one week; while over 21% indicated it took one to two weeks. The most frequently cited duration was three to four weeks.

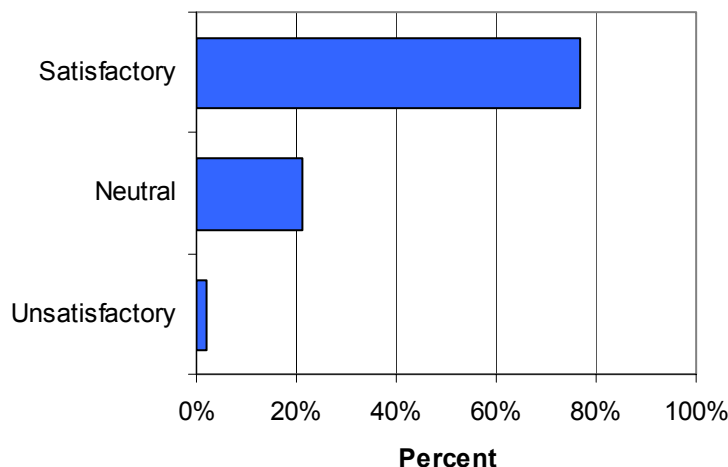
Table 3-6. Length of time to process RETC applications as reported by survey respondents

Length of time	Number	Percent
Less than 1 week	10	2.1%
1-2 weeks	101	21.2%
3-4 weeks	188	39.5%
More than 4 weeks	68	14.3%
Do not know	109	22.9%
Total	476	100.0%

Source: RETC Participant Survey, CPW 2002

Seventy-seven percent of survey respondents indicated they were satisfied with the length of time it took OOE to process their RETC application. Just over 20% indicated they were neither satisfied nor dissatisfied, while a small percentage (2.1%) indicated they were dissatisfied.

Figure 3-6. Survey respondent satisfaction with length of time it took to process RETC application



Source: RETC Participant Survey, CPW 2002

Office of Energy staff were interested in whether RETC participants were using the OOE Website as a resource. About 8.5% of survey respondents indicated they had visited the OOE Website. The survey did not explore the reasons why respondents used or did not use the OOE Website. It did, however, ask those respondents that had visited the Website to evaluate the Website of four characteristics. Table 3-7 shows the results.

The results indicate the majority of respondents that had visited the OOE Website rated it as either “good” or “excellent” on all four characteristics. In fact, the only characteristics that was rated as below average by any respondents was the ease of finding relevant information. The survey asked respondents to provide suggestions on how OOE could improve its Website; however, respondents provided few useful suggestions (see Appendix B for a transcript of the comments). Caution should be used in interpreting these data since few respondents had visited the OOE Website.

Table 3-7. Respondent evaluation of the Oregon Office of Energy Website

Characteristic	Below				
	Excellent	Good	Average	Average	Poor
Content (n=35)	20.0%	68.6%	11.4%	0.0%	0.0%
Ease of use (n=36)	25.0%	55.6%	19.4%	0.0%	0.0%
Ease of finding relevant information (n=36)	19.4%	52.8%	22.2%	5.2%	0.0%
Applicability of information (n=35)	22.9%	57.1%	20.0%	0.0%	0.0%

Source: RETC Participant Survey, CPW 2002

Satisfaction with appliance

Oregon Office of Energy staff were interested in participants satisfaction with their appliance. The survey asked nine questions to assess participant satisfaction with their appliance.

Table 3-8 shows that nearly half of the survey respondents indicated they paid more for their energy efficient appliance. About 36% said they did not pay more, and over 15% indicated they did not know.

Table 3-8. Percentage of survey respondents that indicated they paid more for their energy efficiency appliance

Response	Number	Percent
No	199	35.7%
Yes	272	48.8%
Do not know	86	15.4%
Total	557	100.0%

Source: RETC Participant Survey, CPW 2002

Table 3-9 shows the additional amount survey respondents paid for their energy efficient appliances. Overall, about 22% of respondents indicated their appliance cost \$0-\$100 more, while 34% paid \$101-\$200 more. Table 3-3 also shows the additional cost by type of appliance.

Table 3-9. Additional cost to RETC participants for energy efficiency appliances

Additional Cost	Clothes				Water Heater	All Appliance Types	
	Washer	Dishwasher	Refrigerator			Number	Percent
\$0-100	20.5%	38.3%	40.4%	43.8%	55	22.2%	
\$101-200	31.1%	29.8%	30.8%	6.3%	84	33.9%	
\$201-300	21.3%	10.6%	15.4%	25.0%	48	19.4%	
\$301-400	5.7%	8.5%	1.9%	12.5%	17	6.9%	
\$401-500	9.8%	2.1%	3.8%	0.0%	16	6.5%	
\$501+	5.7%	4.3%	3.8%	0.0%	13	5.2%	
Do not know	5.7%	6.4%	3.8%	12.5%	15	6.0%	
Total	100.0%	100.0%	100.0%	100.0%	248	100.0%	

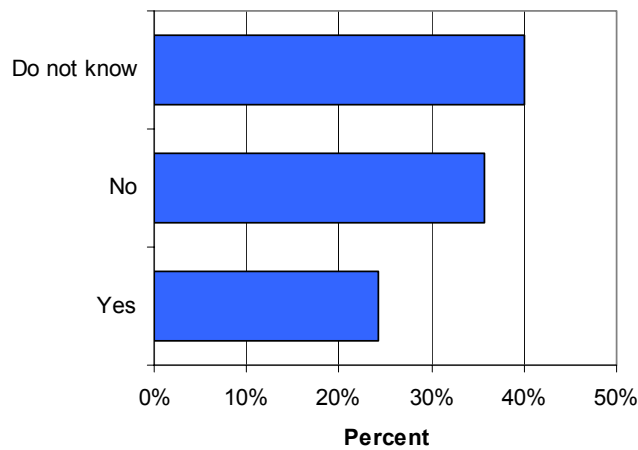
Source: RETC Participant Survey, CPW 2002

Note: Includes only those respondents that indicated they paid more for their appliance.

As a follow up to the question about additional cost, the survey asked respondents whether they felt that their appliance was worth the additional cost. Nearly 89% of respondents indicated they felt their appliance was worth the additional cost.

The survey asked respondents whether they had noticed a reduction in their electric bill since the purchase of their energy efficient appliance. Figure 3-7 shows that less than 25% of the respondents noticed a reduction in their electric bill. Notably, 35% of respondents did not notice a reduction in their electric bill, while 40% indicated that they did not know if their appliance had reduced their electric bill. It is important to note that this finding represents respondents' perceptions of their energy savings—not actual energy savings. It is likely that many respondents simply did not pay attention to their electric bills before and after their purchase or did not remember since it could have been up to two years since they purchased their appliance.

Figure 3-7. Responses to the question “have you noticed a reduction in your electric bill or electric use since you purchased your appliance?”



Source: RETC Participant Survey, CPW 2002

OOE staff were interested in whether water conservation was a factor for those program participants that purchased a clothes washer or dishwasher. Over 80% of respondents that purchased these types of appliances indicated that water conservation was an issue.

Table 3-10 shows what survey respondents did with their old appliance. About 39% of respondents indicated they recycled their appliance, while 29% indicated they sold or traded in their appliance. Less than 11% indicated they disposed (threw away) of their appliance.

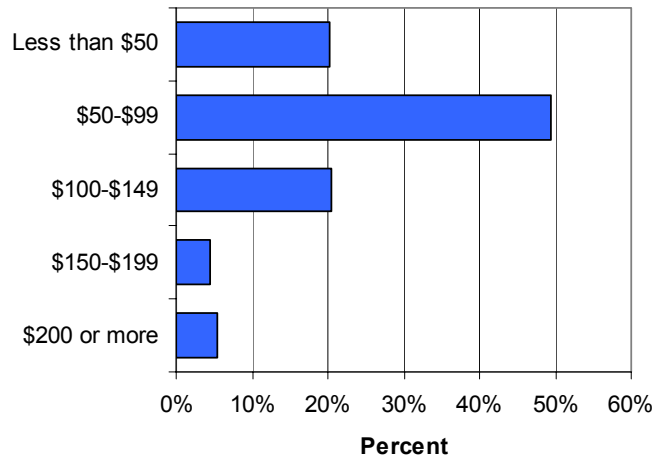
Table 3-10. What survey respondents did with their old appliance

Category	Number	Percent
Sold or traded in	156	28.9%
Continue to use	34	6.3%
Recycled	208	38.5%
Threw away	58	10.7%
This was not a replacement	84	15.6%
Total	540	100.0%

Source: RETC Participant Survey, CPW 2002

The survey asked respondents to indicate the minimum amount of tax credit that would make the RETC program attractive to survey respondents. Figure 3-8 shows that nearly 50% indicated that \$50-\$99 would be sufficient. Just over 20% indicated that a credit of \$50 or less would be sufficient incentive for them to participate in the program.

Figure 3-8. Minimum tax credit that would make the RETC attractive to survey respondents



Source: RETC Participant Survey, CPW 2002

Over 97% survey respondents indicated they would use the Residential Energy Tax Credit program again. About 2.4% indicate that future use of the program would depend on various factors. Those factors included having better information on the program, knowing the amount of the tax credit before purchasing their appliance, or that they did not pay income taxes in Oregon.

The survey concluded with a question that asked respondents to provide additional comments on any aspect of the RETC program. A total of 136 respondents provided written comments. The comments are presented in Appendix B. Table 3-11 shows a summary of the comments. Over 40% of the respondents commented that the RETC was a good/successful program. Other respondents addressed public awareness, program expansion, qualifications for the program, and other issues.

Table 3-11. Summary of written survey comments

Response Categories	Number	Percent
Good/Successful Program	55	40.4%
Program is wasteful	4	2.9%
Quality of Appliance	4	2.9%
Public Awareness (program/energy efficiency)	9	6.6%
Expansion of Program (other appliances)	11	8.1%
Qualification (assistance/explanation)	7	5.1%
Affordability	4	2.9%
Miscellaneous	30	22.1%
Wait for credit too long	1	0.7%
Too long ago/can't remember	11	8.1%
Total	136	100.0%

Source: RETC Participant Survey, CPW 2002

Appendix A

Survey Instrument

This Appendix presents the various instruments used in the administration of the Residential Energy Tax Credit participant survey. As stated in the Purpose and Methods section of Chapter 1, the survey administration process consisted of (1) mailing out an initial postcard informing participants they would receive a survey, (2) sending an initial survey with a cover letter explaining the purpose of the survey, (3) sending a reminder postcard to non-respondents, and (4) sending a second survey to participants that had yet to respond after the reminder postcard.

Specifically, this appendix includes the:

- Survey instrument
- Initial postcard
- Initial cover letter
- Follow-up postcard
- Follow-up cover letter

Residential Energy Tax Credit Survey

Instructions: The Oregon Office of Energy is sponsoring this survey to better understand the effectiveness of the Residential Energy Tax Credit Program. The Office of Energy wants to assess your satisfaction with the Residential Energy Tax Credit program for energy efficient appliances. Your answers will help the Oregon Office of Energy identify ways to make the program more effective. The survey has been sent to a randomly selected sample of 1,500 participants.

The person that completed the Residential Energy Tax Credit application should complete the survey. Please read each question carefully and answer to the best of your ability. Please take a few minutes to complete the survey and return it in the enclosed postage-paid envelope by **Wednesday, November 27, 2002**. Thank you for your time!

Note: Your participation is voluntary and your returned survey indicates your willingness to take part in the study. If you have questions regarding your rights as a research participant, please contact the Office of Human Subjects Compliance, University of Oregon, 5219, Eugene, OR 97403, or call (541) 346-2510.

First, we'd like to ask some questions about your participation in the Residential Energy Tax Credit program:

- Q-1. How did you learn about the Residential Energy Tax Credit program? (Check all that apply)
- Retailer
 - News/advertisement
 - Word of mouth
 - Web site
 - Other, please specify: _____
- Q-2. Did the retailer you purchased your energy efficient appliance from notify you of the Residential Energy Tax Credit program at the time of your purchase?
- Yes
 - No
- Q-3. Did the availability of the tax credit influence your decision in any way towards the type of appliance you chose to purchase?
- No
 - Yes, please explain: _____
- Q-4. Why were you interested in a higher efficiency appliance? (Check all that apply)
- Lower utility bills
 - Concern about environment
 - Quality
 - Other, please specify: _____
- Q-5. What appliance(s) have you purchased since January 2001 that qualifies for the Residential Energy Tax Credit program? (Check all that apply)
- Clothes washer
 - Dishwasher
 - Refrigerator
 - Water heater

Now, we would like to ask some questions about your satisfaction with the tax credit process:

Q-6. Please rate the ease of understanding the Residential Energy Tax Credit application materials.

- Very easy
- Easy
- Neutral
- Difficult
- Very difficult

Q-7. Where did you get your application for the Residential Energy Tax Credit program?

- Appliance store or department
- Office of Energy website
- Mail
- Phone
- Other, please specify: _____

Q-8. Did you request additional information or assistance from an Oregon Office of Energy employee?

- No (**skip to Q-10**)
- Yes → What type of information? _____

Q-9. If you did request additional information or assistance from the Oregon Office of Energy, how would you rate the employee?

Characteristic	Excellent	Good	Average	Below Average	Poor
Courtesy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helpfulness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timeliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-10. How much time elapsed between when you purchased your appliance and when you submitted your most recent Residential Energy Tax Credit application?

- Less than 30 days
- 30 to 60 days
- 60 to 90 days
- 90 or more days

Q-11. In which quarter did you submit your most recent Residential Energy Tax Credit application?

- 1st Quarter (January-March)
- 2nd Quarter (April-June)
- 3rd Quarter (July-September)
- 4th Quarter (October-December)

Q-12. How long did it take the Oregon Office of Energy to process your Residential Energy Tax Credit application?

- Less than 1 week
- 1-2 weeks
- 3-4 weeks
- More than 4 weeks

Q-13. Overall, how would you rate the length of time it took the Office of Energy to process your application?

- Satisfactory
- Neutral
- Unsatisfactory

Q-14. Have you ever visited the Residential Energy Tax Credit section of the Oregon Office of Energy Web site (www.energy.state.or.us)?

- Yes
- No (**skip to Q-17**)

Q-15. If you have visited the Residential Energy Tax Credit section of the Oregon Office of Energy Web site, please rate the following elements:

Characteristic	Excellent	Good	Average	Below Average	Poor
Content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of finding relevant information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applicability of information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q-16. Do you have any suggestions for improvement of the Residential Energy Tax Credit Web site?

Next, we would like to ask some questions about your satisfaction with your energy efficient purchase:

Q-17. Did your energy efficient appliance cost more than other models you considered when shopping for your appliance?

- No (**skip to Q-20**)
- Yes
- Don't Know

Q-18. If you answered "Yes" to Q-17, please estimate how much more it cost: \$ _____

Q-19. If you answered "Yes" to Q-17, do you think the investment is worth the higher initial cost?

- No
- Yes
- Don't Know

Q-20. Have you noticed a reduction in your electrical bill or electrical use as a result of the purchase of your energy efficient appliance?

- Yes
- No
- Don't know

Q-21. If you purchased a clothes washer or dishwasher, was water conservation a consideration in your purchase?

- Yes
- No
- Don't know

Q-22. What did you do with your old appliance?

- Sold/traded in
- Continue to use
- Recycled
- Threw away (disposal other than recycling)
- This was not a replacement

Q-23. What level of tax credit would be the **minimum per appliance** for you to participate in the Residential Energy Tax Credit program?

- Less than \$50
- \$50-\$99
- \$100-\$149
- \$150-\$199
- \$200 or more

Q-24. Would you use the Residential Energy Tax Credit program again?

- Yes (**Skip to Q-26**)
- No
- It Depends

Q-25. If you answered "No" or "It Depends" to the question above, please explain why.

Finally, we would like to ask you some questions about yourself:

Q-26. Please tell us your zip code. _____

Q-27. What is your age? _____ years What is your gender? Male Female

Q-28. How many people live in your household, including yourself?

_____Adults (18 and over) _____Children (17 and under)

Q-29. Do you rent or own your home? Rent Own

Q-30. For the purposes of comparison with U.S. Census data, please estimate your total household income for the year 2001:

- | | | |
|--|--|--|
| <input type="checkbox"/> Less than \$5000 | <input type="checkbox"/> \$15,000-\$24,999 | <input type="checkbox"/> \$75,000-\$99,999 |
| <input type="checkbox"/> \$5,000-\$9,999 | <input type="checkbox"/> \$25,000-\$49,999 | <input type="checkbox"/> \$100,000-\$149,999 |
| <input type="checkbox"/> \$10,000-\$14,999 | <input type="checkbox"/> \$50,000-\$74,999 | <input type="checkbox"/> \$150,000 or more |

Q-31: Please share any other comments you have about your participation in the Residential Energy Tax Credit program in the space below.

ALL RESPONSES WILL BE KEPT CONFIDENTIAL

Thank you for completing the Residential Energy Tax Credit survey!

Initial Postcard

We need YOUR help!



The Oregon Office of Energy wants to assess participant satisfaction with the Residential Energy Tax Credit program. As a recent RETC program participant, you've been chosen to take part in an upcoming survey to help the Office of Energy evaluate the effectiveness of their tax credit incentive program for energy efficient appliances. Your responses will help the Office of Energy gauge the success of the program to date, and will assist in identifying ways to improve the program.

Your opinions are valuable. Please take a moment to complete and return the upcoming Residential Energy Tax Credit survey you will receive in the near future.

Thank you for your time and attention,

A handwritten signature in black ink that reads "Bob Parker". The signature is written in a cursive, flowing style.

Bob Parker
Director, Community Planning Workshop

Initial Cover Letter

November 2002

Dear Residential Energy Tax Credit Program Participant,

We need your help!

The Oregon Office of Energy is in the process of evaluating the Residential Energy Tax Credit program. As a part of the evaluation, the Office of Energy is conducting a survey to gauge satisfaction of participants. You are one of 1500 randomly selected participants to receive this survey.

I encourage you to complete the enclosed survey to provide your opinions of the Residential Energy Tax Credit program that you participated in for your new energy efficient home appliance. The more responses we receive from participants such as yourself, the better informed the Oregon Office of Energy will be at findings ways to make the program more effective.

Your opinions are important to us. **Please return your completed survey no later than Wednesday, November 27, 2002** in the enclosed postage paid envelope. If you have any questions regarding the survey, please feel free to contact Justin Grishkin, Community Planning Workshop Project Manager at 541-346-3651.

Thank you for your participation!

Sincerely,



Bob Parker
Director
Community Planning Workshop

Follow-up postcard

We need YOUR input!



As a recent **Residential Energy Tax Credit** program participant, you've been chosen to take part in a survey to help the Office of Energy evaluate the effectiveness of their incentive program for energy efficient appliances. The University of Oregon's Community Planning Workshop mailed surveys to select program participants the second week of November. If you have received a survey but have not yet filled it out and returned it, please take the time to complete and return the survey by **Friday, December 6th**.

We appreciate your help! Your responses will help the Office of Energy gauge the success of the program to date, and will assist in identifying ways to improve the program.

Thank you for your time and attention,

A handwritten signature in black ink that reads 'Bob Parker'. The signature is written in a cursive, slightly slanted style.

Bob Parker

Director, Community Planning Workshop

Follow-up cover letter

November 2002

Dear Residential Energy Tax Credit Program Participant,

We need your help!

The Oregon Office of Energy is in the process of evaluating the Residential Energy Tax Credit program. As a part of the evaluation, the Office of Energy is conducting a survey to gauge satisfaction of participants. You are one of 1500 randomly selected participants to receive this survey.

If you have already completed and returned a previous copy of this survey – *Thank You!* – please do not fill out the survey again.

If you have not, please take the time to do so now. The more responses we receive from participants such as yourself, the better informed the Oregon Office of Energy will be at findings ways to make the program more effective.

Your opinions are important to us. **Please return your completed survey no later than Friday, December 20th, 2002** in the enclosed postage paid envelope. If you have any questions regarding the survey, please feel free to contact Justin Grishkin, Community Planning Workshop Project Manager at 541-346-3651.

Thank you for your participation!

Sincerely,



Bob Parker
Director
Community Planning Workshop

Appendix B

Transcript of Written Survey Comments

Background

The survey included opportunities for respondents to provide written comments. Several questions requested specific written input or comments from respondents.

The survey also solicited general comments. Specifically, Q-31 stated “Please share any other comments you have in the space provided below.” Following is a transcript of written comments provided by survey respondents. The comments are presented by question.

Transcript of written survey comments

Q-1. How did you learn about the Residential Energy Tax Credit program?
(Check all that apply)

- It's been too long, I don't remember
- Can't recall
- Don't recall
- I'm not aware of participating
- My utility provider
- Utility programs (EWEB)
- Utility, Salem Electric
- On the product, In the electric bill
- Our electric company
- Electric company
- Utility's mailing
- Flyer in electric and gas bills
- Tillamook Public Utility
- Lane Electric Coop
- PGE Brochure
- I think info was included with utility bills
- The Energy Connection
- Friend
- Daughter told me
- Earlier resident of Oregon
- Always know about!!
- My daughter bought appliance (refrigerator) for me for Christmas last year
- Furnace/air installer/sales guy

- Furnace Company
- Dealer
- Window installer - Mark and CO.
- Appliance dealership
- Hang tags on appliances
- Purchase of appliances
- Sticker on appliance
- On tax forms
- I am a tax preparer
- On tax forms
- Save on power
- Tax instruction booklet sent with forms
- For heat pump installer
- Also our builder - who bought the appliance
- Builder
- PP and L
- Industry
- From the plumber
- Contractors - Elec/Mech
- Contractor, several years ago
- Oregon tax booklet/I prepare taxes.

Q-3. Did the availability of the tax credit influence your decision in any way towards the type of appliance you chose to purchase?

- Made it more affordable
- Added another incentive to buy this brand
- Sure - it was frosting-on-the-cake of doing a good thing
- I was looking for an efficient appliance and the tax credit helped reinforce my choice.
- We wanted an energy-efficient appliance, and the tax credit was a bonus
- It was an incentive to do what's right (i.e. reduce energy demand)
- Nice to get rewarded for your particular purchase
- Although "leaning" towards the items, the credit helps with final choice.
- Felt better about buying energy efficient appliance at higher price,
- Helped
- Extra bonus - always helpful
- But not a major consideration
- Increased interest
- It was a great deal!
- Purchased one that qualified
- It helped with my decision
- Increased my interest
- Influenced decision positively
- Price was incentive
- Major incentive to buy energy efficient and get tax/\$ credit
- I was able to afford a better machine that was better for the environment
- The credit was seen as helping mitigate the higher cost of the front-loading washing machine
- Lowered price - could get a better quality

- Makes it more affordable
- It would then not cost as much
- Brought the price within range
- \$
- Influence for paying a higher price on appliance
- A rebate on purchase is good
- Helps offset the initial higher cost
- Bought only high appliances, got high quality appliance at lower price
- I deducted it from the price
- Defined total cost
- Factored tax credit into total purchase cost
- Because we paid more knowing in the long run it would even out.
- Helped to balance price
- Tax credit equals \$ and savings
- It helped with the cost
- Cost
- Could afford a more efficient appliance
- Saved money
- Reduced cost of appliance
- Made it more reasonably priced
- Savings on appliance
- We felt the tax credit was a way of getting money back.
- It made higher efficiency more affordable
- Reduced purchase price
- Part of cost consideration
- Made it less expensive in long run
- Leveled out extra cost
- Helped offset the added cost (less efficient appliances were cheaper)
- Would have been too expensive w/out rebates
- The tax credit reduced the higher cost of the appliance
- It was worth the extra price with the energy refund
- Monetary gain
- Savings short and long term
- Lowers our out of pocket expense
- Front load washer was more expensive than top load model. Credit helped to partially offset cost.
- Cost effective
- Appliance cost less after credit.
- Another way to save money
- Reduced price of higher cost appliance.
- Reduced the price.
- Better buy.
- Because of tax credits, we could spend more for appliance.
- Though appliance was more expensive, I received some money back.
- Made price look better.
- Cheaper price.
- Made purchase more affordable.
- It helped to offset the higher price of the appliance
- Brought the cost down
- Helps pay more for quality

- Money back is always good!
- Felt better about higher cost.
- Lowered the price paid with tax credit
- Helped make a more efficient machine more affordable
- Added the cost reduction to purchase price to justify purchase
- Offset price of appliance
- It lowered the sticker price
- In the long run, I though I [would] save more money
- It made a high efficiency machine more affordable
- It helped lower my cost of the appliance
- I could afford it
- Made front load washer more cost effective
- Cost was close to non-tax credit item
- Less expensive
- Lower overall cost
- Save money
- We're able to put the savings towards a better model
- Make it more cost effective
- Price was less expensive with tax rebate
- Reduced expenditure
- It was less expensive
- Went with higher efficiency appliance for less dollars to operate, larger amount \$ back
- Made it more cost effective
- I reasoned the tax credit would lower cost of good appliance
- Helped us buy a better quality model than we would have
- Reduced cost to approximately that of less efficient machines
- A tax credit meant a greater savings on the purchase price
- Overall price of product
- Reduced cost, efficient appliances usually more expensive
- It made the higher priced appliance much more affordable
- Lower costs
- Seemed like we were saving money over the long run
- Helped lower the cost
- Reduced net cost
- Total cost
- The cost after rebate was lower
- It allowed me to afford it
- Made an energy saving appliance more affordable
- Made paying more palatable
- Made product more affordable
- Because of high cost of appliance
- Allowed us to buy higher quality
- Cash
- I was looking at a cheaper washer but the tax credit helped bring the cost down on the more expensive Maytag
- We bought a more expensive model than we would have
- It brought the price down to the same as the less efficient product
- I prefer efficient products
- Quality, energy saving

- Slightly - wanted an energy efficient appliance
- Uses less energy and less water
- Helped justify higher efficiency of furnace
- Want something energy-efficient
- I wanted to make sure we bought the most energy efficient one we could.
- Liked idea of using less energy and receiving credit for that.
- Like energy efficient appliance
- Helped choose environmentally friendly appliance
- More concerned about environment but many people need incentives to learn
- More efficient model
- It brought to our attention the energy efficiency of the appliance
- Promoted visibility to better efficiency models
- Purchased a more efficient product
- Resource conservation
- This was an energy saving refrigerator
- Affirmed product as energy saver
- Energy efficiency
- Because I cared about saving energy
- I would prefer to have a more energy efficient appliance.
- Wanted to save energy
- The appliance uses less electricity
- We bought an energy efficient appliance because we want to reduce our use of energy
- More efficient
- We wanted an energy-efficient appliance.
- I live in the country conserving is important.
- It helps save energy.
- We wanted the most energy efficient.
- Regardless of credit I want to save resources
- More energy efficient
- Efficiency
- Energy savings
- Encouraged us to buy energy efficient appliance
- Conserve water and power
- Made us feel that the energy efficiency claim was real - not just marketing gimmick
- Tax credit reflected energy efficiency
- Lower utility bills, concern about the environment
- It strongly influenced me to buy a more energy efficient appliance
- Re-enforces fact appliance has energy efficient qualities I cared about
- I support energy efficiency to protect the environment
- It was between two appliances so I chose the energy efficient
- Chose the more efficient model
- It did because of the energy efficiency of the appliance
- Encouraged energy planning/ consciousness
- Concern for environment prior to purchase
- More energy efficient
- Less energy
- Save water

- I was willing to pay a little more for a better quality energy efficient appliance
- Tax savings possible
- We purchased a model that qualified
- Felt that if tax credit given must be environmentally good
- Decided to buy one that carried a tax credit
- Receiving any tax credit back would influence more my purchase.
- Wanted to get tax write off
- Probably would not have purchased a Neptune washer w/o credit
- Amount of tax credit
- On sale plus Tax Credit - great buy!
- Tax credit
- The tax credit makes it easier to invest in the higher cost, more efficient appliance.
- Simply - a tax credit!
- Only considered those with credit.
- Met level of qualifying
- We would not have bought it.
- Tax credit meant energy efficient appliance.
- Help with taxes!
- Lower taxes
- Yes some appliances did not have tax credit
- Tax credit
- Willing to pay more for a HW Heater knowing we would get the tax credit
- Sought qualifying appliances
- Lower my taxes
- If quality is equal, why not take the credit
- Rebate
- Want to support energy tax credits. Money back for more efficient furnace
- W/o credit, would not have purchased more expensive more energy efficient washer
- Not at first, but I liked the idea of saving \$
- Every bit helps
- Rebate
- I received a better purchase both economically and energy eff.
- Probably - but can't really remember - like the tax credit - like the idea of energy efficient appliances
- Energy conservation and less utilities \$
- Tax credit coupled with projected energy savings was huge motivator
- Credit and lower operating costs
- Tax credit and lower electric use
- It was a bonus, plus I feel it is important to save energy
- Reduced price; energy conservation
- Tax credit, more efficient appliances, lower utility bills
- If it helps the environment and gives me a credit it's a good deal.
- It saved money and energy costs although the set was more expensive than others with the credit.
- Purchased a more expensive, more efficient appliance

- It was one of several factors
- The savings at time of purchase plus monthly saving
- Better for environment, cheaper use.
- Brand 1st but \$'s back 2nd
- Less money (discount) and more efficient.
- Lower cost, energy efficiency factor.
- We chose a refrigerator based in part on efficiency and the credit.
- Saves money, saves energy.
- Energy efficiency and rebate
- (1) Save my energy output, (2) much needed tax credit.
- 2 reasons (1) energy savings, (2) tax saving.
- Energy efficiency plus rebate = win win combination
- It reduced price and encouraged me to think utility costs would be lower.
- Purchased high cost with tax savings
- Lower net cost and better utility use = smarter decision
- Better for environment as well as savings
- Saves energy, costs less
- I liked the idea and savings
- Help conserve resources. Save money,
- Lower cost to operate and buy
- Lower cost - long term investment
- Better price, increased efficiency
- Saving \$ and energy is desirable
- Greatly influenced purchase
- I could do the right thing for the environment and save money at the same time,.
- Saving water, power and tax credit all felt good
- Saving money over time, conserve natural resources
- I liked the product initially and I felt good buying a product that saved energy from a global and personal (monetary) standpoint
- Lower cost now and in the future
- It made an expensive appliance more affordable
- Better quality at lower price with credit
- Energy efficiency and tax credit lowered cost
- Save money by reducing energy cost
- I wanted to save energy costs
- Cost less to operate
- Saving on monthly bills
- Electricity too high
- Because it might lower our utility bills
- High efficiency - cheaper to operate
- It indicated an energy savings, and that energy savings was desirable.
- cost savings on future electric bill
- Less energy, therefore less of a bill.
- Lower utility bills
- Wanted more energy efficient because of cost of energy
- I want to lower my monthly bills
- We looked for lowering energy costs
- Cheaper to run
- Lower utility bill

- Second carrier 90% furnace
- "Duh" saved money on more efficient model.
- It helped us compare prices and energy efficiency between models/brands.
- Huge difference!!
- The (frontloading) wash machine was a lot more expensive than a top loading one.
- I assumed I was buying quality, efficiency, etc.
- We purchased by deadline for that unit
- People should be rewarded for making positive environmental choices.
- New
- Purchased appliance quicker
- Could purchase an appliance better suited to my families needs
- Research into products led me to what I purchased
- Wasn't the total reason but it helped
- It would if that was the case
- One factor only
- Somewhat, but primarily it has a space constraint
- Caused re-evaluation of choices
- Daughter chose this
- Side-by-side fridge versus other model
- Purchased a different brand
- Also because of the Maytag brand
- It determined our choices

Q-4. Why were you interested in a higher efficiency appliance? (Check all that apply)

- Low water in spring-fed system
- Less water-use all on a well and septic tank
- Save water from my well
- A desire to consumer less
- Saving water
- We have a well and septic system - this machine uses less water.
- Less usage of energy
- Use less water
- Low water consumption
- I would have chosen energy efficiency without the credit but having it available was definitely an additional incentive
- Future energy needs
- New
- I wasn't interested, I needed the item.
- Old appliances needed to be replaced
- Needed a new one
- Replace old appliances
- Just bought [after suggestion] from the plumber
- Replacement of older equipment
- It's the right type of appliance to buy - the right thing to do
- See Q3 above

- n/a
- Plumber bought and installed
- Since we could afford it the idea was good. Too bad they are not affordable for everyone
- To cover my needs.
- Wanted geo-thermal
- I'm sure all apply
- Cleaning efficiency, less detergent.
- Reliable of carrier
- Performance
- Easier on clothes
- Long lasting
- Front-load washer gets clothes cleaner using less water.
- Better for our clothes
- Easier on clothes - front load washer
- Better design, smaller, fit in our small room
- Not able to haul wood for wood stove
- Better performance
- Tax credit
- Tax savings
- Res. Energy Tax Credit
- Less cost
- Tax credit
- Credit make purchase less
- Tax credit
- Lowered the cost of the appliance
- Tax Credit
- Rebate
- Tax credit
- Tax credit
- Lower cost
- Less expensive to operate
- More value over the long term

Q-7. Where did you get your application for the Residential Energy Tax Credit program?

- Can't remember!
- I don't remember
- Don't remember - it was 2 years ago
- Website or store - can't remember which
- I believe from my utility?
- Don't recall - either retailer or city
- Can't recall
- I can't recall.
- I don't remember
- Can't remember
- Don't remember
- City of Corvallis

- University of Oregon
- City of Ashland (I think)
- Manufacturer
- Retailer adjusted price
- Furnace Installer
- Sears made it simple - they printed out another receipt and all the info and paperwork I needed
- Furnace Installer
- Forest Grove Power Co.
- (Can't read)
- EPUD
- We don't have application now
- Plumber installed water heater
- PP & L
- Accountant

Q-8. Did you request additional information or assistance from an Oregon Office of Energy employee?

- Needed document for tax prep.
- Replacement credit slip
- Form instructions
- Help with filing, which I did not do.
- How to answer some of the questions,
- How to fill out forms
- Called
- Regarding timing - they wanted to start job prior to application approved
- Info on certain water heaters
- Did not receive application form for submission after I mailed application
- Tax implications. (by phone)
- Confirmation of amount of tax credit
- As a tax preparer - year of purchase applicable or the year of appliance submitted?
- How tax credit worked
- Oregon office of energy tax credit amount

Q-16. Do you have any suggestions for improvement of the Residential Energy Tax Credit Web site?

- No
- No - I haven't looked in quite a while.
- No
- Have not used the web site.
- No
- No
- No
- No
- No

- No
- No
- None at this time
- No
- No
- Yes more publicity. We could get no credit for new windows because we didn't know we first had to get an evaluation
- Give it on site when you purchase the appliance to have to do into the energy office is a mistake and people don't do it.
- Large tax credit, some appliances are over \$1,000
- It's been too long, I don't remember it real well.

Q-24. Would you use the Residential Energy Tax Credit program again?

Q-25. If you answered "No" or "It Depends" to the question above, please explain why.

- How much it is \$
- I don't have any way of determining whether the extra money I spent on a energy-efficient refrigerator saves any money. Electric rates have gone up. I don't know how to distinguish between energy savings (if any) and rate changes.
- We aren't that price sensitive under \$100
- Price, quality, benefit
- I would have to get a good sale price. I'm on a limited budget now.
- I live in Oregon 3/4 of each month and this is where I use the washer. Because my husband lives in CA where I spend the 4th week of each month, I could not claim the full tax credit. I could only claim about \$16.00!
- We don't make enough to pay taxes
- The R.E.T.C. was explained to us as a tax return. We had planned to use the money to help pay for the machine. We would not make a choice to buy solely on R.E.T.C.
- Cost of products
- If I fully understand the program
- I had to amend income tax to include tax credit and (approx.) 1 year later have not received my credit
- The amount of government red tape and intrusion like this survey
- I think it was only a one time credit of like \$50.

Q-31: Please share any other comments you have about your participation in the Residential Energy Tax Credit program in the space below.

- It was a nice bonus to get \$150 tax credit when we purchased our washer, but it was the reduced energy/water use that was our main concern (although smaller utility bills are nice, too). I am sure that for other people considering a lower-resource use appliance, a tax credit will be a factor in their decision to purchase a higher-priced appliance.
- good program. It does encourage people to consider energy efficient appliances when shopping and comparing brands even if you don't actually notice lower utility bills.

- The energy tax credit was an extra incentive to buy the item I really wanted!! Top of the line - front loading Maytag washing machine.
- Several of my clients have used credit also - I think it's a great program - please continue it!
- Valuable program! Please keep in place and continue to promote it!
- It worked well - thanx!
- Easy to use - wonderful program, truly encouraging.
- It's a great incentive for people to conserve energy
- A good idea - lets people know of saving and conservation
- These types of programs are extremely important, not only because they provide motivation for consumers, but also send the message that our government is actively seeking solutions to difficult environmental problems
- I think that it is an excellent program and I hope that it continues.
- We used the rebate and expected energy costs in computing the actual cost. The rebate is good for consumers.
- I think it's a great thing all appliances should be energy efficient. I'm glad the incentive to buy energy efficient appliances is available.
- Keep it going! There's far too much money flowing as subsidies to fossil fuels so this program is one of the few to counterbalance it. Especially with a total lack of national leadership for energy conservation.
- Great program! Keep it up.
- I feel it is a good program to encourage purchase of energy efficient appliances
- My husband and I think it is a wonderful program!!! Keep up the good work!
- I believe it is a very beneficial program to our area and country.
- This is a great program because it encourages the manufacture and use of more energy efficient appliances, and that in turn reduces adverse environmental impacts.
- The tax credit makes up the difference of the higher priced appliance and I would prefer to have the higher priced appliance because they are the one that offer "Energy Efficiency" which is important with the higher cost of power and water.
- Great program. Wish it was for stoves too.
- I'm glad that we have this kind of program to encourage people to conserve - a must for the future of our sustainability.
- I think that this is a valuable program. It is unfortunate that the federal government does not pass legislation that would mandate higher levels of energy efficiency. I hope that your program survives the pending budget woes. Thank you!
- We were very pleased with the overall transaction, and would like to have a whole house full of energy efficient products. Thank you for offering it.
- The program as a whole provides a good incentive to the consumer to think about conservation and energy efficiency and how s/he may want to play a part in that.
- Good work!
- Thank you!
- It is a great incentive for purchasing more energy efficient appliances.

- Good ideas if worth it.
- Thought it was great!
- It was a little confusing, but worth the effort to apply.
- Excellent program - good foe consumers and the environment.
- Great program. When making a new purchase I compare your listed appliances to consumer reports, to get the best appliance for the least amount of money. I specifically choose the new dishwasher and clothes washer (w/credit) because of the water conservation and future money savings. (water and sewer bills in Oregon are very high) We will need to purchase a new fridge and will attempt to use the program again. Also will use program again for a new oil-furnace or blower. Thank you.
- I think this is an excellent program that stimulates people to do something of benefit to the community.
- The tax program is certainly a good one. We need every incentive we can give our populous to save energy. My income is low so the credit would have helped a lot in the purchase of my washer. My husband and I do not commingle our funds. I support myself, but we file taxes jointly. The credit should be based on where the appliance is used.
- It is a very good idea for the state to promote energy conservation
- No complaints, think it is a good idea
- Keep up the good work.
- Good program keep it going.
- We appreciated the energy tax credit program. Thank you.
- It worked, it's a good idea. People need to spend the couple extra bucks for the better appliances. It will more than pay them back in the long run.
- Good programs
- Great program - made us proud of Oregon's environmental commitment and gave credibility to manufacturer's claim of energy efficiency - very impressed by ease of program. Thank you.
- The residential energy tax credit was definitely a deciding factor for us. It helped us afford a better model (i.e., a more efficient model). I think the state should continue this credit to encourage the use of newer, cleaner, technologies.
- Probably helpful to any one trying to purchase new appliances
- The residential energy tax credit program is an excellent and important program
- It is an additional encouragement to buy energy efficient appliances, and I think it reinforces the value of doing everything possible to save energy in large and small amounts
- You should continue to have the program because the product was environmentally better and it was just an x-tra kick back for us too!
- Good program, nice incentive to help out the environment. Keep it up, every little bit counts in the long run.
- I like it. I think it is a great program!
- I'm sorry but it was quite a while ago that I purchased the dishwasher and my memory isn't to "sharp" about all the details. I was pleased that it was energy efficient and the tax credit was greatly appreciated.
- This is a good incentive to purchase energy efficient appliances
- Thank you! It's a good program.

- Great idea, a shame I spaced it on my turbotax and had to amend because I've still not seen the benefit.
- It was easy and my tax accountant was familiar with the paperwork
- I think people should not have to be paid to do the right thing. I thought all appliances these days were energy efficient. So why hand out money?
- Don't bother with this program. Let the free enterprise system work on it's own. Abolish or. Dept. of energy as we have greater needs for tax dollars.
- Consumers seldom if ever base their need on the existence of this program. It's just another waste of my tax dollars. Though conservation is a valid reason for improvement, minor tax credits are just another wasteful administrative boondoggle and surveys like this increase that waste further.
- Energy saving was only one of a number of factors in our appliance selection. The tax credit was an unnecessary subsidy to us from other taxpayers. The goal of encouraging energy conservation is good. However, it should be justified by the savings from our expected decreased energy use. There is no need for the Residential Energy Tax Credit on top of this.
- The washer had a problem with mold. The door had to be replaced. The bleach dispenser fills with water and the softener dispenser gets mold on lid. The dishwasher doesn't dry fast enough. Very poor.
- Because I returned the front-loading clothes washer. It produced too much vibration in its 2nd floor location. I mailed the Oregon state tax credit statement back to ODOE with a letter of explanation. Also I notified EWEB (my electric utility) of the return so they could remove the credit to my account. Later I was told via letter from EWEB that they would have had no way to know about the appliance return if I had not been honest about it. While appliance returns are probably rare, applicants should be advised to notify ODOE, and their utility if same has given them a bill credit, should an appliance return become necessary.
- Adult senior care. Quality of appliance excellent - "Maytag"
- We had some problems with the energy efficient appliance (refrigerator) we bought in 2000 and learned that manufacturers are using smaller motors that use less energy but also don't last as long. This has given us second thoughts about purchasing energy efficient appliances, particularly since the cost of replacing cheap parts can easily offset any cost savings in energy efficiency.
- We just bought a new refrigerator (kitchen aid) which uses less electricity than the old one but we didn't see anything about a tax credit on any of the ones we looked at.
- See note about the windows Q16
- When I bought my washer and frig one dealer acted as though he was unaware of program. I wondered if somehow he was planning on getting it.
- We just put in a new gas-forced air furnace - air conditioner - another energy Tax Credit appliance. As a consumer I am now more aware and look for more energy -efficient and environment-friendly appliances whenever possible!

- I'm concerned about conserving and protecting the environment. The tax credit was not real important to me personally. I do hope the energy tax credit encourages others to purchase appliances that conserve power and water.
- Your office could help find and disseminate information about 'on demand' hot water heaters - no storage tank - water heated only when wanted. I had a propane one in another house, in Maine - worked greater - very efficient - could save much energy and it is a much smaller appliance than a conventional hot H2O heater.
- Thanks for the incentive....might help to raise awareness among population, though.
- As a tax preparer I find most people haven't figured out how to apply for the credit. I use my position to teach them. Thanks.
- I believe it is a good program to encourage energy and resource conservation. May need a little more general publicity. Information with the utility bill is good.
- Great idea but would like to see larger credits - \$40 credit seems minimal
- It's great - expand it to autos, everything!
- Think all appliances should have tax credits
- This is a good program. It should be aggressively applied to other products and services.
- It would be nice if more appliances had the energy tax credit available.
- Conservation is the most cost effective way to conserve energy and natural resources. Education and incentives are the most effective way to promote conservation. Keep it up! Expand programs! Save the future!
- Concerning alternate sources of energy, tax credits are only offered for solar installation. What about wind or water?
- It should be available to anyone who purchases energy conserving appliance. Reduced energy and water usage is a benefit for all and as long as one is purchased then the purchaser should receive the tax credit. No exception or qualifying requirements other than proof of purchases and what was purchased.
- Need more such programs
- I think that window replacements should qualify for a tax credit. They make a huge difference.
- Hope you continue so people will reduce energy, wish it was on cars too.
- Better publication of where to acquire forms. Emphasize tax credit if you do not owe taxes - credit is not available. Better explanation of proof of purchase, what to include.
- The person who sold us our heating/cooling, energy efficient gas system said it would qualify for a tax credit and gave us form to submit, but it didn't qualify. We don't understand why. We purchased other appliances that did qualify.
- I purchased a high-efficiency heat pump in sept-2002, but could not qualify for a residential energy tax credit because I did not purchase a programmable thermostat. This doesn't make to good a logic.
- We have not used our credit yet because we are lower income and can't take the deduction.

- We put in a heat pump, but you won't give us an energy credit on it because it's not in the ground. It has the energy credit star.
- Ward's Department store advertised a larger tax credit than I received. I had to argue with them for reimbursement. Washer doesn't rinse well as a conventional machine. So with re-rinses it uses same amount of energy/washer as conventional.
- As stated in Q 25, the program was misrepresented to us. So while we may have answered Q-6 as easy, perhaps some of the information given to retailers is less clear.
- I am disappointed in the credit program for high efficiency gas furnaces - we have a smaller home (1250 sqft) and no need for heat pumps, etc. It seems as if home owners who have huge, unnecessarily spacious homes are more likely to benefit
- Q23. Really depends on whether the credit nearly offsets any increased cost of the appliance vs. a similar "non-energy" credit item.
- I have no income that allows me to buy anymore appliances so I just pray everything keeps running.
- We have also purchased a solar heating unit for our swimming pool and hot water. Both had substantial tax credits which helped us in our decision to purchase high end items.
- Q20. Our electricity use is below 1,000. We have children and grandchildren who come and stay and we think we do very well with the amount of electricity used in our home. Q21. We have an artesian well. While we don't waste water, we don't concern ourselves about being stingy.
- None.
- None
- Appliance purchased was a Lennox furnace to replace an old inefficient furnace.
- Sorry this took so long to complete.
- Did not buy the appliance because of the tax credit. It was a nice bonus. Did buy it to cut down on water usage.
- I'm sorry I don't believe I have purchased any energy saver appliances.
- The refrigerator we purchased was installed in a summer cabin in LaPine, OR and is not used continuously. No way to monitor efficiency rating.
- Appliances purchased by builder - retail salesman advised me of credit program.
- It would be nice if the credit would be carried over to another year - if it has been a bad year for income and medical expenses
- We need more energy saving appliances in the near future - since electric and water bills seem to go up and up all the time. Thank you.
- I would like an affordable solar system
- The purchase I made was in June 2000
- We also replaced all the windows in our home with an energy loan from EWEB at the same time we installed the water heater and a free standing natural gas stove to replace a wood stove.
- I've used this three times, so I don't know which appliance you are referring! My washing machine was much more expensive, but I wanted to conserve water so I bought. Go Ducks!

- Sorry, don't know.
- Actually when I finished this questionnaire, I went back to see what documentation I had. None. I assume this applies to a water heater I replaced in September 2001. I thought a credit was a cost savings and an indication of efficiency. I have no idea how the credit is applied. I don't see any record in my 2001 Oregon taxes. I did see a credit in my utility bill. So I really don't know much about the Residential Energy Tax Credit program.
- Note that I also purchased a solar hot water heater and received that credit
- I found the same model \$50 cheaper in two other stores with the energy tax credit.
- I have purchased two appliances under this program and filled out this questionnaire for the most expensive system
- I have not yet sent in my tax credit application. I will do so when I do my taxes.
- Go Beavs!
- I had to wait until I filed my income tax to get the credit. Did particularly care for that because I had to pay the total amount then wait for the rebate 6 months then another 2 months. Too long to wait when you're poor.
- It would have been easier (and more accurate) if this survey had been more timely to our use of the program; 2 1/2 years later it is difficult to remember answers to questions Q6 through Q16. On a few questions I can only guess since my memory has faded.
- this survey is too late. Don't remember some of the answers this long. Had I known there was going to be a test I would have taken notes!
- I think this survey is referring to the Maytag Neptune washing machine that I bought in April of 1999, which was over 3 1/2 years ago. I can't remember the answers to several of the questions.
- I can't remember the details I believe it was the IRS who gave me my rebate not the Department of Energy. I remember they wanted too much information and I did not have time to go back in.
- I don't mind participating in the survey, but we bought the appliance almost two years ago and I honestly don't remember exactly how long everything took to process, or what quarter we purchased in. I just answered to the best of my recollection.
- Survey is so long after purchase some questions cannot be answered or must be guessed. I am not comfortable answering personal information & thus elected not to.
- I do not know which appliance involved this credit. When I moved 4 years ago I bought every appliance in my home new.
- To give you more accurate info - I wish this questionnaire could have been conducted at time of appliance purchase.
- I can't remember when we bought the new dishwasher or very many details about the energy credit process
- Sent out the survey soon after the tax credit is applied for, it has been so long since I bought something I am not sure what we are talking about.

- The appliance I purchased was a refrigerator in June 2000. Since it was so long ago I don't remember many of the details - sorry! It is a great program.
- The energy tax credit is nice but I would purchase the most energy efficient appliance I could, even without the tax credit
- Keep it up! Great!
- I would like to see more information sent with utility bills to customers on how to receive the Oregon energy tax credit and how an appliance is considered eligible. I think there should be an energy tax credit if more than 80% to 100% of the lighting in a home is florescent lights.
- We like our energy saving washer a lot and the Energy tax Credit was such an extra bonus on our taxes the year we made our purchase we were Very happy!
- Energy tax credits should be shaped to help the lowest incomes level. It appears that credits apply only to the more costly items.
- The RETC is an effective way to entice society to "do the right thing" and invest in expensive, high efficiency appliances.
- This survey is very untimely. Our 3 qualifying appliances were purchased in 2000, so can't be very accurate in my answers, especially Q7, Q10 + Q12, more than 2 years later.
- I do not know if the same department handles the geo-thermal heat pumps or not. We installed one probably 3-4 years ago and got a tax credit. My only suggestion would be that before the state issues tax credit of that size there should be regulation and inspection of the system to be sure it is installed correctly. I would rather have had less of a credit and more supervision of the loop installation.