

Fast Feedback Results

2012 Report

Prepared by
Gilmore Research Group
April 26, 2013

Executive Summary

Overview of Fast Feedback

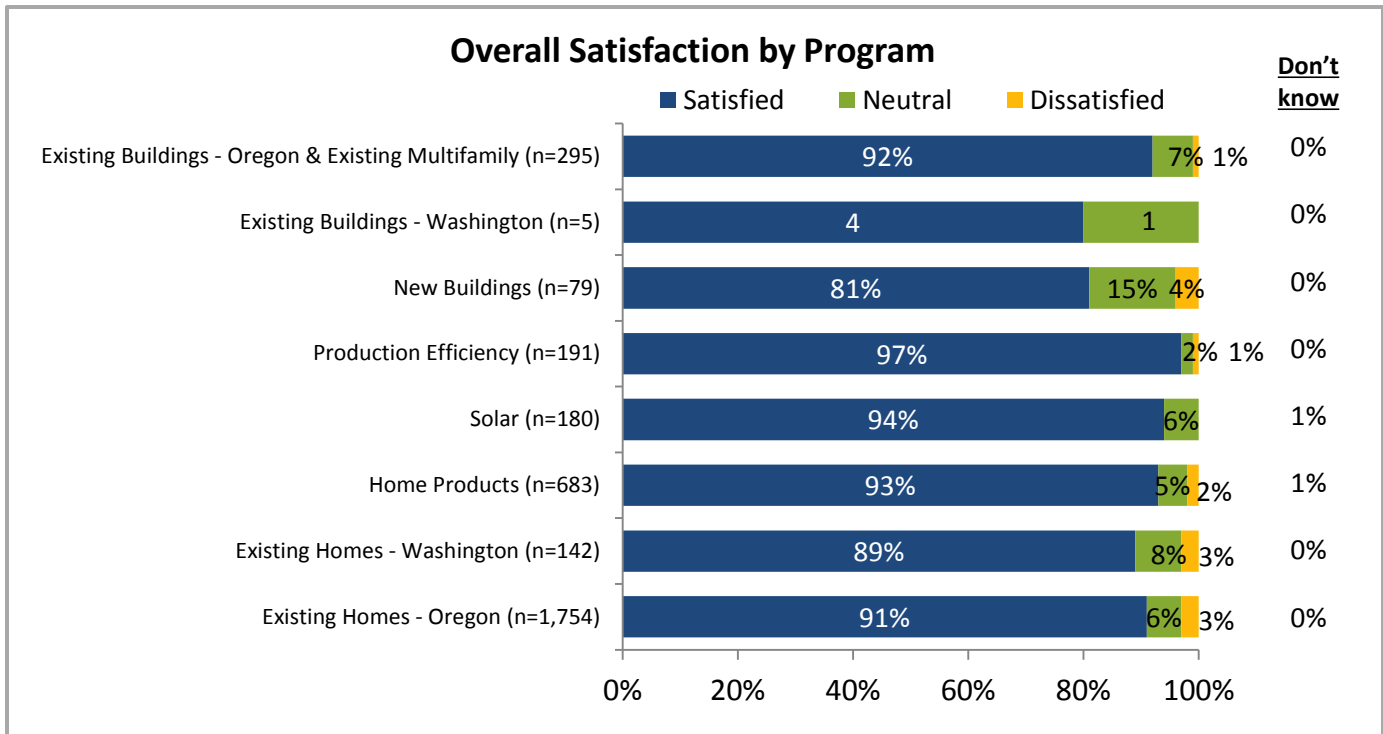
- Fast Feedback is a short phone survey of a sample of recent program participants to assess satisfaction, understand customer decision making, and gather suggestions for program and process improvements. The survey is generally 10 questions or less, is customized for each program or measure of interest, and is designed to take no more than 5 minutes to complete.
- There are quarterly quotas for each program or measure of interest based on the project volume expected in that quarter. We attempt to survey enough participants to achieve 90% confidence and 10% precision each quarter. Calls are made each month to randomly selected participants whose incentive check was processed in the previous month and who have not been surveyed in the previous 12 months. Results are summarized and distributed quarterly to program staff. There is at least one opportunity in each survey for the respondent to give feedback that is recorded verbatim, and this feedback is provided with anonymity to program staff on a monthly basis (not included in this report).
- A total of 3,337 participants from 2012 were surveyed between February 2012 and February 2013.
- Beginning Q3 2012, satisfaction and influence throughout this report will be calculated as the percentage of respondents providing a rating a of 4 or 5 out of 5, excluding "don't know" responses.
- All numbers in this report are annual unless otherwise noted.

History of Fast Feedback

- Fast Feedback began as a pilot in mid-2009 for participants in the Existing Buildings and Production Efficiency programs. The pilot yielded timely information to programs and participants were appreciative of the opportunity to provide feedback. Based on this success, in the second quarter of 2010 Fast Feedback was extended to most Energy Trust programs. A report on methods and results from Q2 2010 is available on the Energy Trust website; Fast Feedback continues to follow the methods cited in that report.
- In Q2 2011, survey calling moved from Energy Trust's general call center to Gilmore Research Group. Survey questions were adjusted to be more consistent across programs and measures, the number of open-ended comments was reduced from two to one (most respondents only provided one comment anyway) and general coding was added to the open-ended comments. These comments are provided monthly to program staff and are not included in this report.

Summary of Results

- Satisfaction with overall experience was high for the program groupings shown below, ranging from a high of 97% for Production Efficiency to 81% for New Buildings.

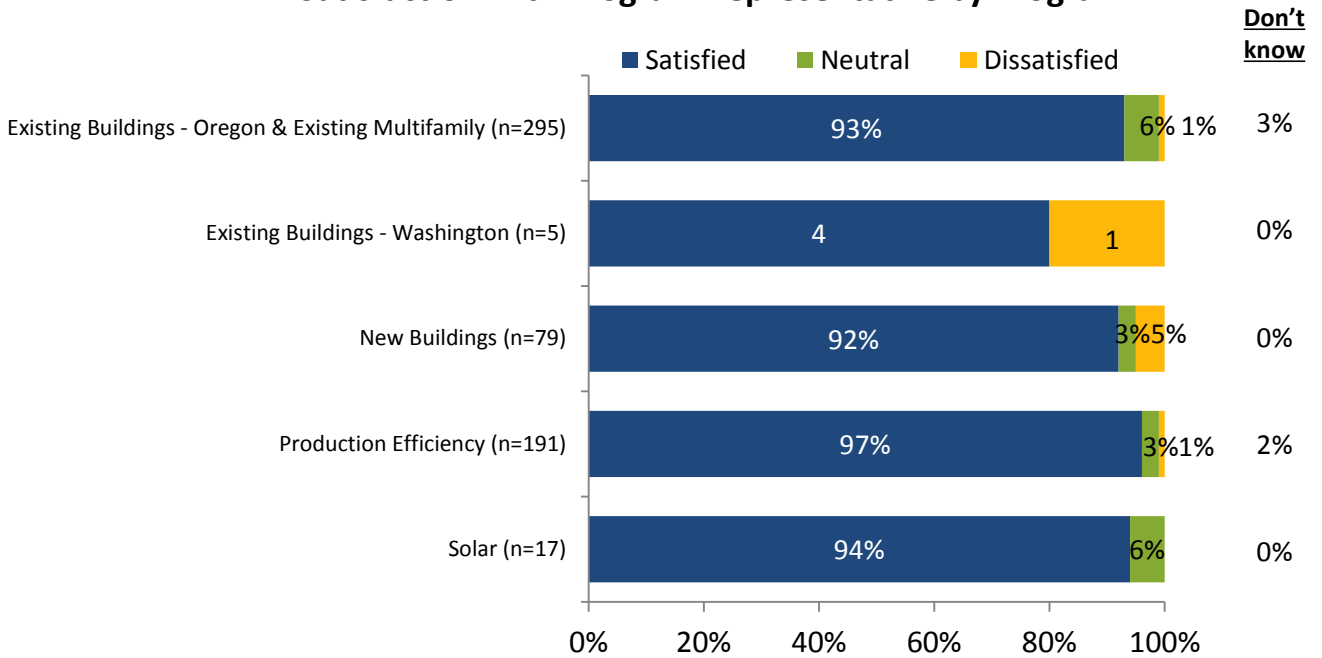


- Most programs or measures showed 90% or more participants as satisfied.
- Free ridership – the portion of participants who would have made energy efficient improvements or upgrades without incentives or information from Energy Trust – was much more variable than satisfaction and ranged from a high of 52% for refrigerators to a low of 16% for Existing Buildings – Oregon electric projects and Production Efficiency electric projects. See the appendix for an explanation of free ridership calculations.
- For many programs and measures, the Energy Trust incentive was the most influential of the program aspects in the decision to undertake an energy efficient improvement or upgrade. Other aspects investigated included information provided by Energy Trust, the contractor or design professional, and other features unique to certain programs or measures, such as free pick-up for refrigerator recycling.

Summary of Results

- Satisfaction with overall experience was high for the program groupings shown below, ranging from a high of 97% for Production Efficiency to 92% for New Buildings.

Satisfaction with Program Representative by Program



Summary of Results

Program	Respondents	Percent Satisfied	Free Ridership‡	
			Electric	Gas
Commercial Sector				
Existing Buildings – Oregon	210	92%	16%	18%
Existing Buildings – Washington	5	4 of 5	--†	--†
Existing Multifamily	85	89%	17%	37%
New Buildings and Multifamily	79	81%	--†	--†
Industrial Sector				
Production Efficiency	191	97%	16%	26%
Solar				
Commercial Solar Electric and Water Heating	17	88%	--†	--†
Residential Solar Electric	149	95%	--†	
Residential Solar Water Heating	14	93%	--†	
Home Products				
Clothes Washers	278	90%		51%
Refrigerators	126	92%		52%
Refrigerator Recycling	279	96%		32%
Existing Homes				
Air Sealing	167	93%		21%
Ceiling Insulation	249	94%		34%
Floor Insulation	231	92%		34%
Wall Insulation	120	92%		40%
Duct Insulation	40	88%		23%
Duct Sealing	130	90%		38%
Heat Pump	235	89%		46%
Water Heaters	93	96%		46% ^α
Windows	219	88%		47%
Home Performance	116	92%		28%
Home Energy Review	263	89%		--
Existing Homes – Washington***	143	89%		--†
Existing Homes – Oregon	1,761	91%		--
Other Renewables				
Small Wind	0	--		--

***Projects also included in other Existing Homes measure totals.

† Free ridership is not calculated through Fast Feedback.

‡ Free ridership estimates for residential measures are calculated for Oregon respondents only. However, the number of respondents for Existing Homes measures includes both Oregon and Washington respondents.

^α0.67 residential gas water heaters are part of a market transformation effort; free ridership is shown for information only and will not be the basis for programmatic decisions about the measure.

Summary of Results

- Existing Homes participants were asked about satisfaction with their contractors; 92% were satisfied with their contractor overall. Satisfaction with the quality of installation work was also very high at 94%. Roughly 30% of Existing Homes participants considered Energy Trust's list of approved trade allies when selecting their contractor.

	Percent satisfied with contractor	Percent who considered trade ally list
Air Sealing	92%	35%
Ceiling Insulation	93%	27%
Floor Insulation	93%	35%
Wall Insulation	90%	28%
Duct Insulation	90%	53%
Duct Sealing	95%	29%
Heat Pump	92%	23%
Water Heaters	96%	31%
Windows	90%	22%
Home Performance	90%	54%

Table of Contents

Executive Summary	2
Summary of Results	4
Commercial Sector	8
Existing Buildings	9
Existing Buildings - Washington	11
Existing Multifamily	13
New Buildings & Multifamily	15
Industrial Sector	17
Solar	20
Commercial Solar	21
Residential Solar Electric	23
Residential Solar Hot Water	25
Home Products	27
Clothes Washers	28
Refrigerators	30
Refrigerator Recycling	32
Existing Homes	34
Air Sealing	35
Ceiling Insulation	37
Floor Insulation	39
Wall Insulation	41
Duct Insulation	43
Duct Sealing	45
Heat Pump	47
Water Heaters	49
Windows	51
Home Performance	53
Home Energy Review	55
Existing Homes - Washington	56
Other Renewables	59
Appendix	60

Commercial Sector Summary

- Fast Feedback surveys were completed with enough participants for results to meet the criteria of 90% confidence / 10% margin of error for all groups except Existing Buildings – Washington, due to the small population size for that group.
- 92% of Existing Buildings – Oregon respondents rated their overall satisfaction a 4 or 5 out of 5. Satisfaction for New Buildings and Multifamily continues to bounce between 70% and 100%, likely due to the changing mix of survey respondent roles in projects.
- Free ridership for Existing Buildings electric projects in 2012 was 16%, down from 30% in 2011, while free ridership for gas projects was 18%, also down from 2011 (27%). Free ridership for Existing Multifamily electric and gas projects was 17%, and 37%, respectively, down from 2011.

Program	2012 Projects [§]	Completed Surveys
Existing Buildings – Oregon*	2,488	210
Existing Buildings – Washington	13	5
Existing Multifamily	236	85
New Buildings and Multifamily*	299	79

*Contains subquotas for program tracks to ensure a variety of project types were surveyed.

[§] Project totals for 2012 only include projects eligible for Fast Feedback, and therefore may not match other Energy Trust reports for 2012.

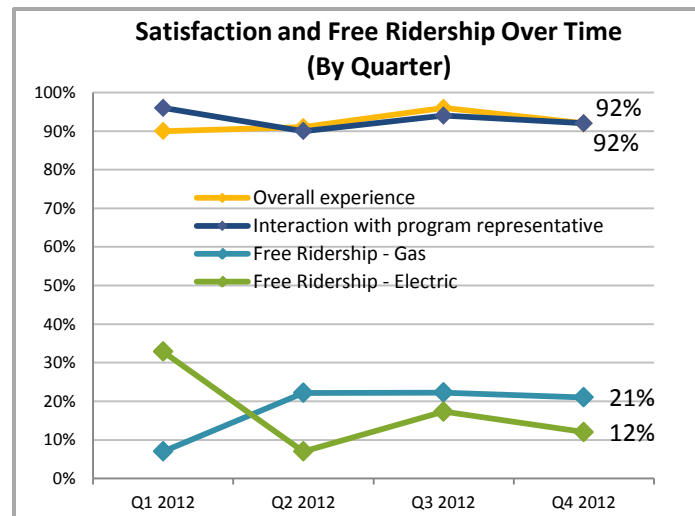
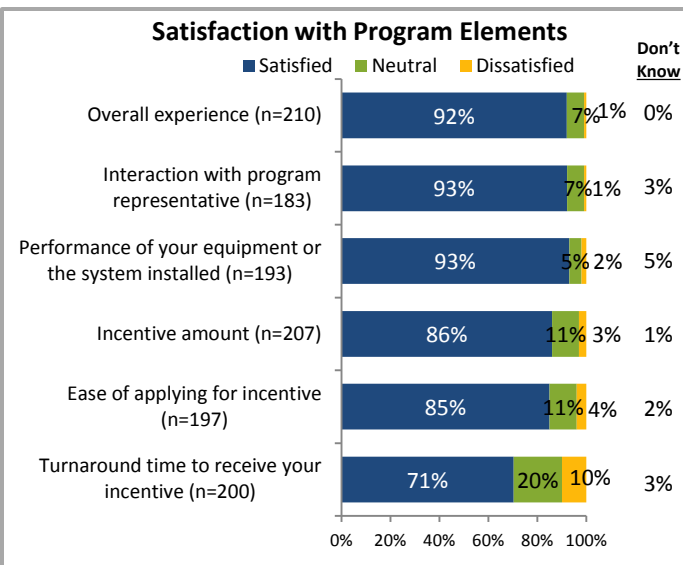
Program	Percent Satisfied	Free Ridership (savings-weighted)	
		Electric	Gas
Existing Buildings – Oregon	92%	16%	18%
Existing Buildings – Washington	4 out of 5	--†	--†
Existing Multifamily	89%	17%	37%
New Buildings and Multifamily	81%	--†	--†

† Free ridership is not calculated through Fast Feedback.

Existing Buildings

- 92% of respondents rated their satisfaction with Energy Trust a 4 or 5 out of 5, in line with 2011 (94%). Satisfaction was lowest for the turnaround time to receive the incentive.
- 24% of respondents would have done the project the same way if Energy Trust incentives were not available; 30% would have postponed the project more than a year.
- The incentive had the greatest impact (79% rating 4 or 5 out of 5) on projects.
- 14% have applied for the Business Energy Tax Credit and 10% still intend to apply.
- About 30% of respondents are aware of the changes to BETC; of those that were aware, just under two-thirds said the changes had not affected their project plans.

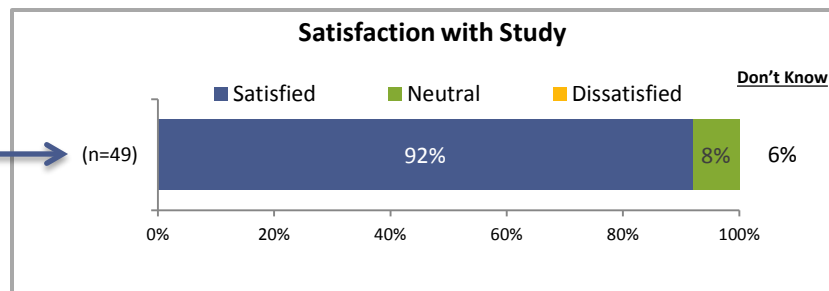
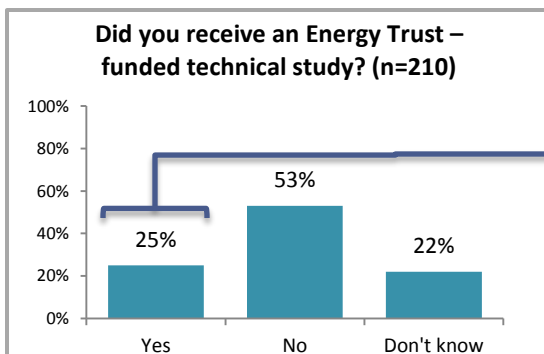
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Energy Trust Funded Study



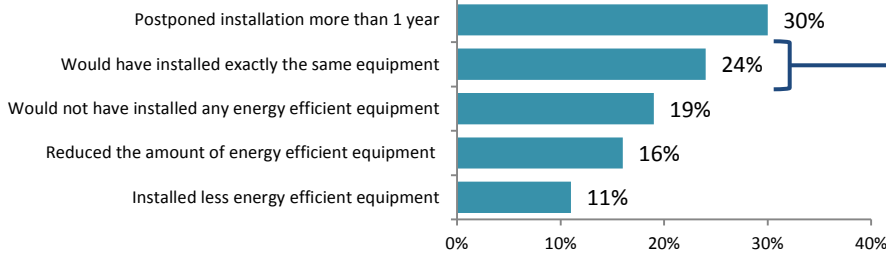
Survey questions:

- Did you receive an Energy Trust – funded technical study?
- Please rate your satisfaction with the quality of the study on a scale of 1 to 5 where 1 means not at all satisfied and 5 means very satisfied.

Existing Buildings

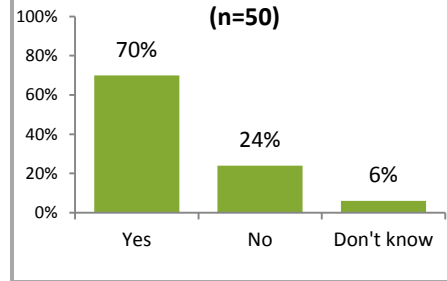
Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=210)*



*Multiple responses possible

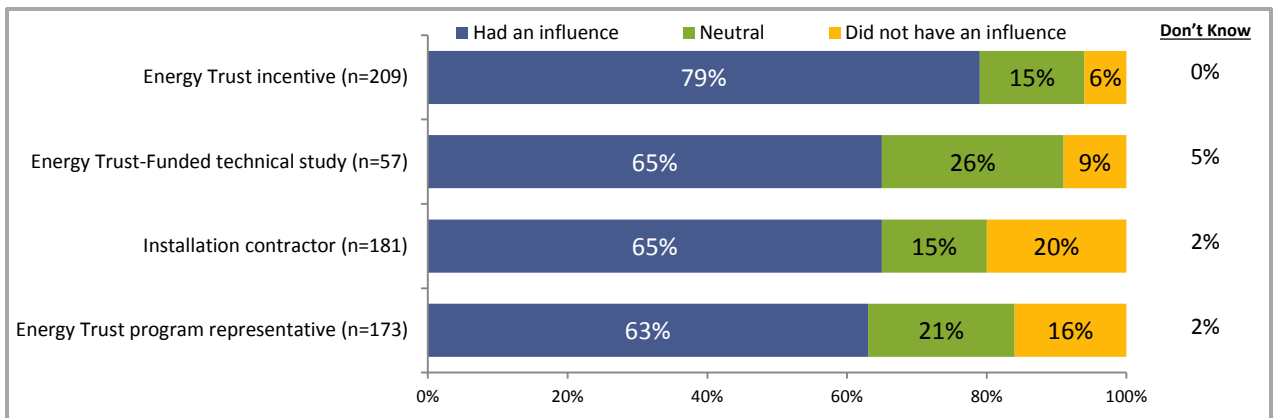
Would project cost have been covered without incentive? (n=50)



Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- If your firm had not received the incentive, would it have made available the funds needed to cover the entire cost of the energy efficient equipment and design?

Influences on Decision to Incorporate Energy Efficient Features in Project



Survey question:

- How influential were the following elements on your decision to incorporate energy efficient features in your project?

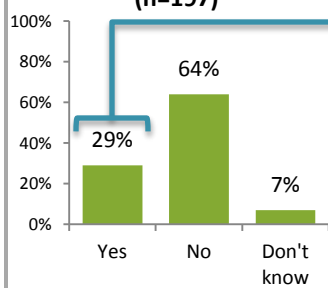
Oregon Business Energy Tax Credit

Have you applied for the Oregon Business Energy Tax Credit?

(n=189)

Yes	14%
No, but plan to	10%
No, do not plan to	32%
Don't know	30%
Not applicable	14%

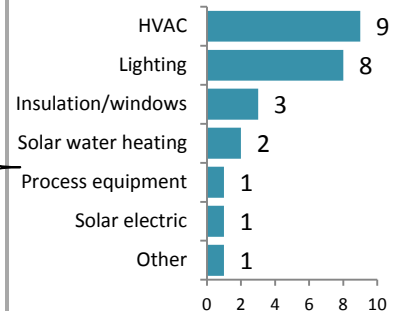
Aware of Changes in 2011 to State Business Energy Tax Credit? (n=197)



Effect of Changes to State Energy Tax Credit (n=57)

No effect	63%
Reduced scope of project	9%
Cancelled project	7%
Delayed project	16%
Don't know	9%

Equipment or Design Affected (n=16)*



*Multiple responses possible

Survey questions:

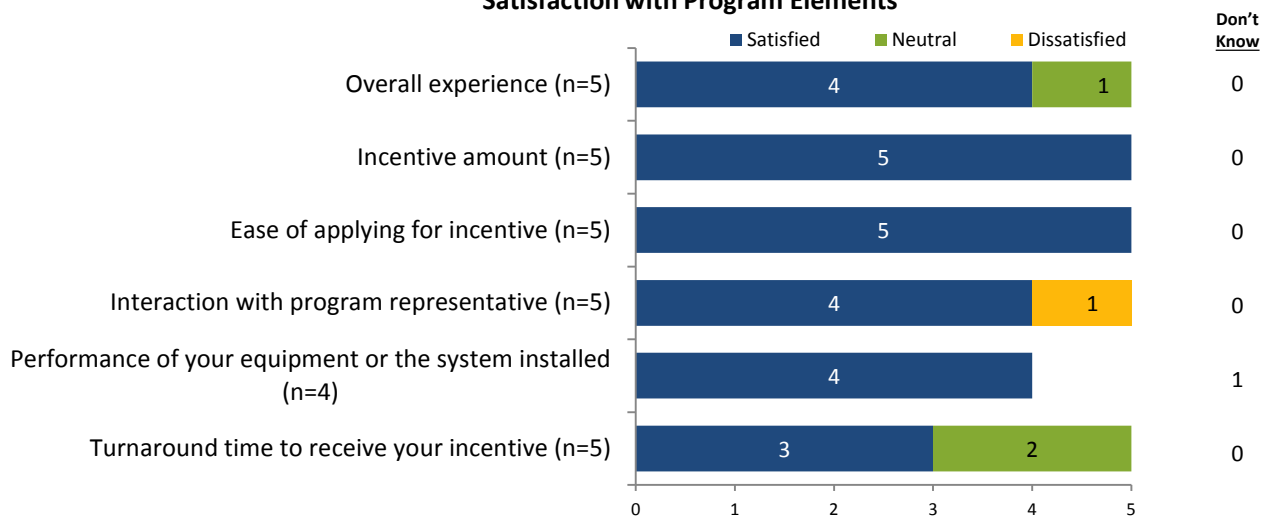
- Have you applied for the Oregon state business energy tax credit for this project?
- Are you aware of the changes that occurred in 2011 to the state business energy tax credit?
- Have the changes in the tax energy credit caused you to reduce, cancel or delay any previous plans to install energy efficient or renewable energy equipment or design in your building?
- What equipment or design was affected? Was it...

Existing Buildings - Washington

- Due to low project volume in 2012, we were only able to interview 5 program participants (all of these participants completed projects in Q1 and Q2 2012).
- 4 of 5 respondents rated their satisfaction with Energy Trust a 4 or 5 out of 5. Satisfaction was lowest for the turnaround time to receive the incentive. All respondents were satisfied with the incentive amount and ease of applying for the incentive.
- 2 of 5 respondents would have installed less efficient equipment in the absence of Energy Trust incentives or information.
- The incentive had the greatest impact (4 of 5 respondents rating a 4 or 5 out of 5) on projects.

Participant Satisfaction

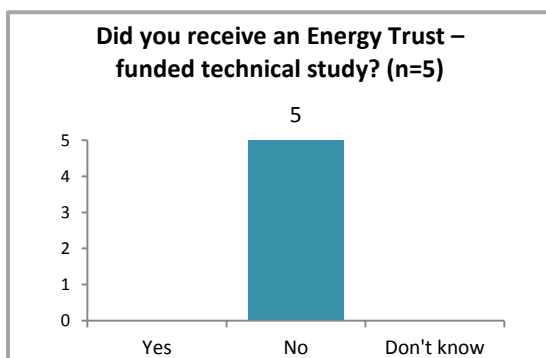
Satisfaction with Program Elements



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Energy Trust Funded Study



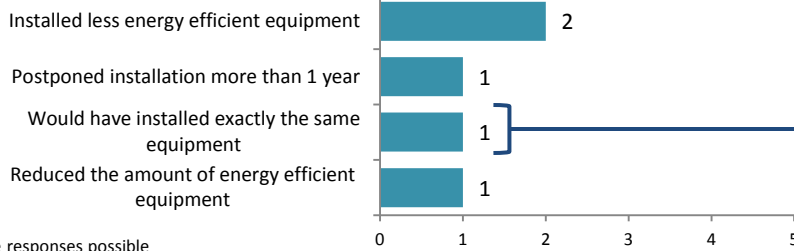
Survey question:

- Did you receive an Energy Trust – funded technical study?.

Existing Buildings - Washington

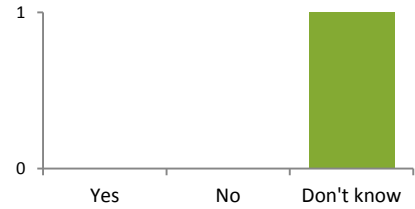
Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=5)*



*Multiple responses possible

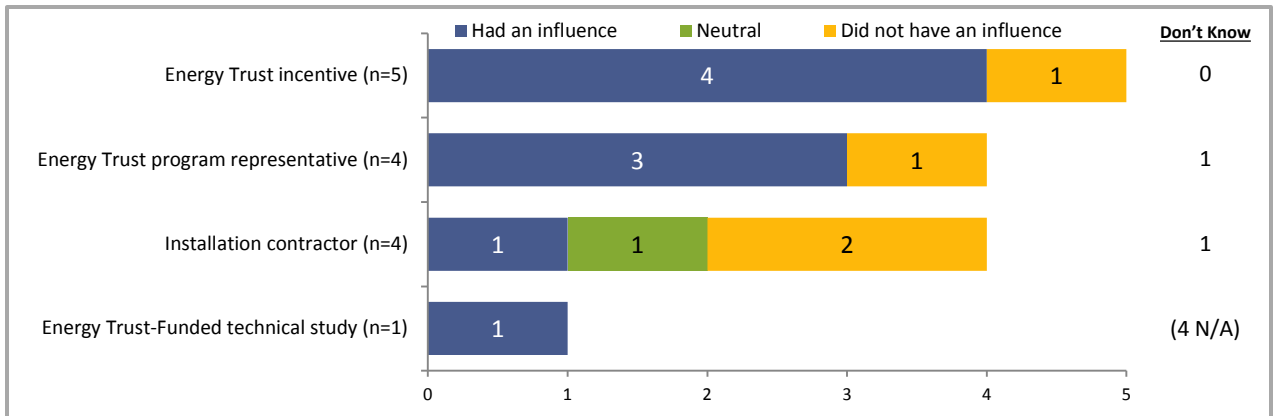
Would project cost have been covered without incentive? (n=1)



Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- If your firm had not received the incentive, would it have made available the funds needed to cover the entire cost of the energy efficient equipment and design?

Influences on Decision to Incorporate Energy Efficient Features in Project



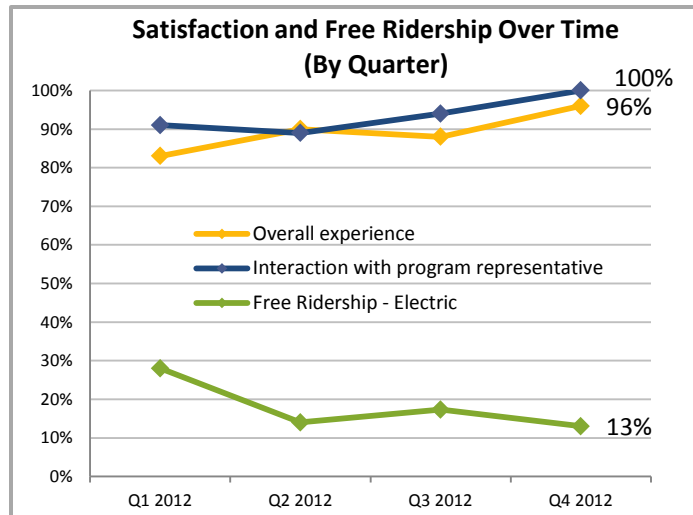
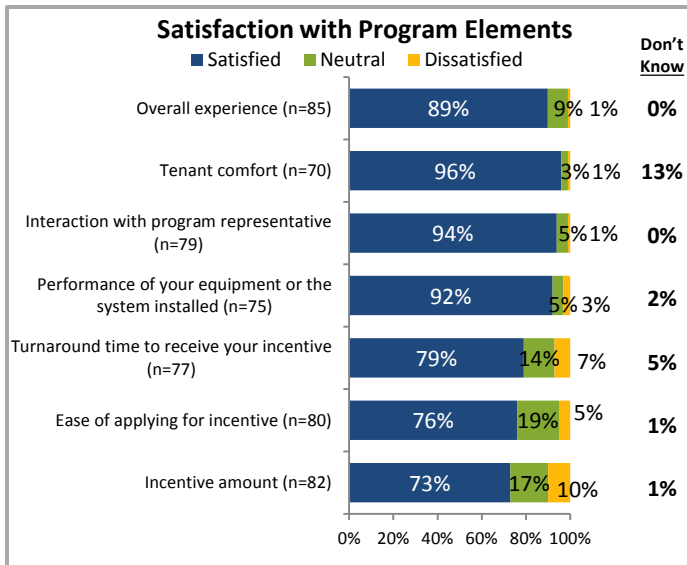
Survey question:

- How influential were the following elements on your decision to incorporate energy efficient features in your project?

Existing Multifamily

- 89% of respondents rated their overall experience a 4 or 5 out of 5 (in line with 2011). Satisfaction was lowest for incentive amount. However, satisfaction was high for interaction with program representatives and tenant comfort.
- Without the incentive, 32% of respondents would not have made changes for at least a year. About a quarter of respondents said they would have made the same improvements without the incentive and 60% of these respondents stated they would have been able to cover the project cost even if they had not received an incentive from Energy Trust.
- The incentive had the greatest impact on projects (77% rating 4 or 5 out of 5).
- About 30% are aware of changes to BETC, and 32% said these changes had not altered their project plans.

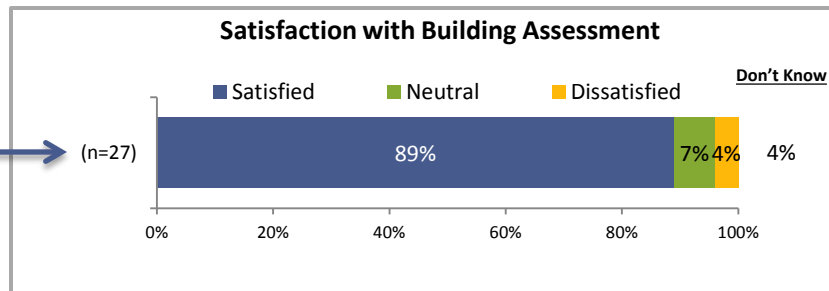
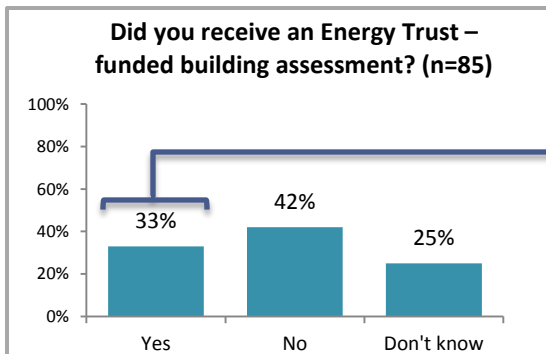
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Energy Trust Funded Building Assessment



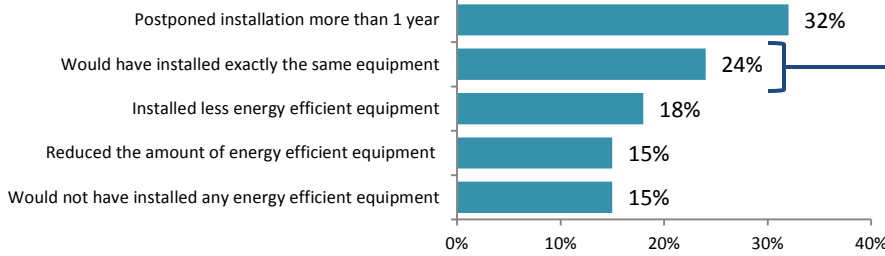
Survey questions:

- Did you receive an Energy Trust – funded building assessment?
- Please rate your satisfaction with the quality of the assessment on a scale of 1 to 5 where 1 means not at all satisfied and 5 means very satisfied.

Existing Multifamily

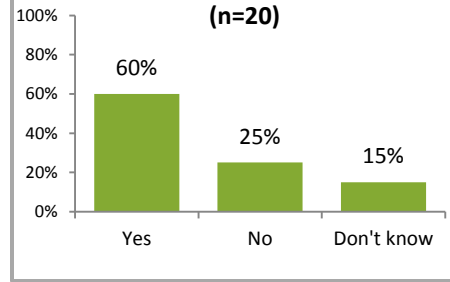
Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=85)*



*Multiple responses possible

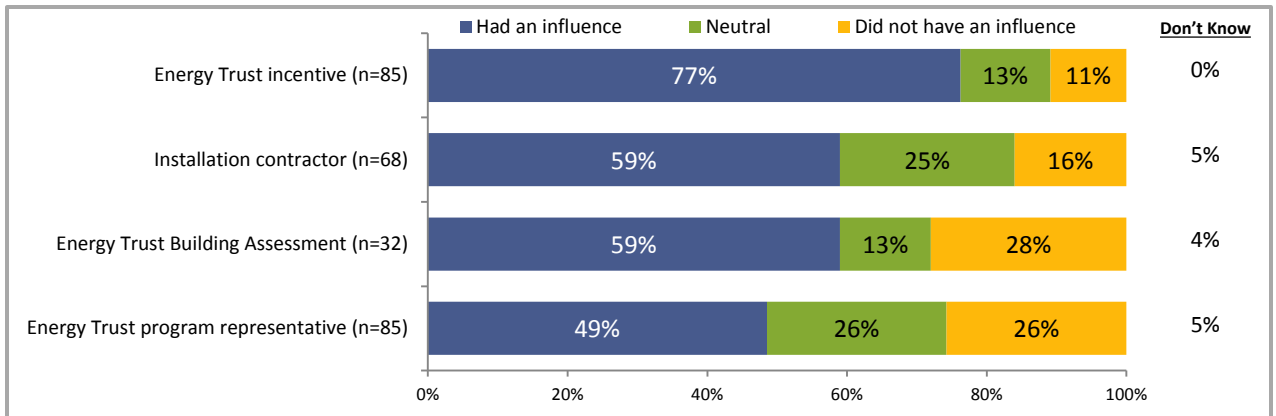
Would project cost have been covered without incentive? (n=20)



Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- If your firm had not received the incentive, would it have made available the funds needed to cover the entire cost of the energy efficient equipment and design?

Influences on Decision to Incorporate Energy Efficient Features in Project



Survey question:

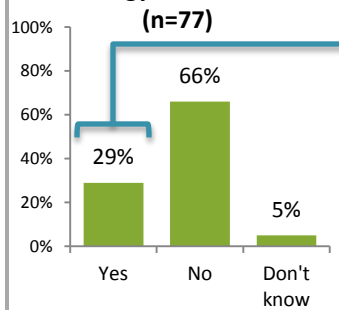
- How influential were the following elements on your decision to incorporate energy efficient features in your project?

Oregon Business Energy Tax Credit

Have you applied for the Oregon Business Energy Tax Credit?

Response	(n=85)
Yes	22%
No, but plan to	13%
No, do not plan to	29%
Don't know	28%
Not applicable	7%

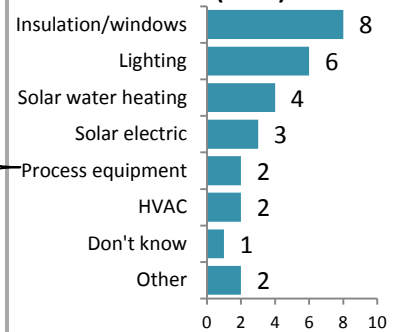
Aware of Changes in 2011 to State Business Energy Tax Credit? (n=77)



Effect of Changes to State Energy Tax Credit (n=22)

Effect	Percentage
No effect	32%
Reduced scope of project	18%
Cancelled project	23%
Delayed project	36%
Don't know	5%

Equipment or Design Affected (n=14)*



*Multiple responses possible

Survey questions:

- Have you applied for the Oregon state business energy tax credit for this project?
- Are you aware of the changes that occurred in 2011 to the state business energy tax credit?
- Have the changes in the tax energy credit caused you to reduce, cancel or delay any previous plans to install energy efficient or renewable energy equipment or design in your building?
- What equipment or design was affected? Was it...

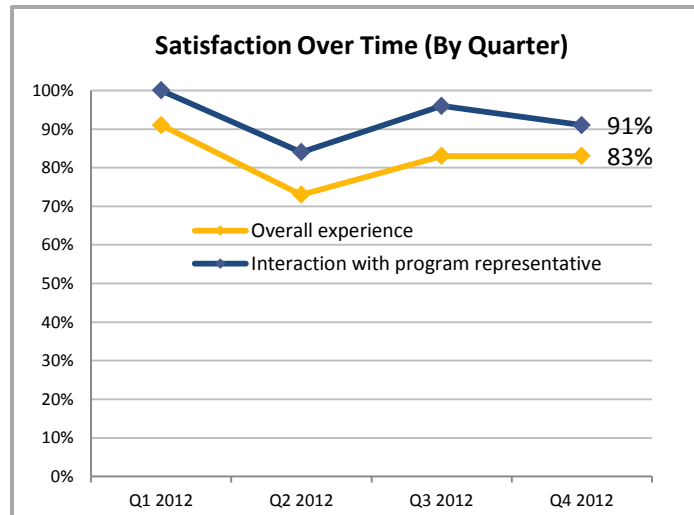
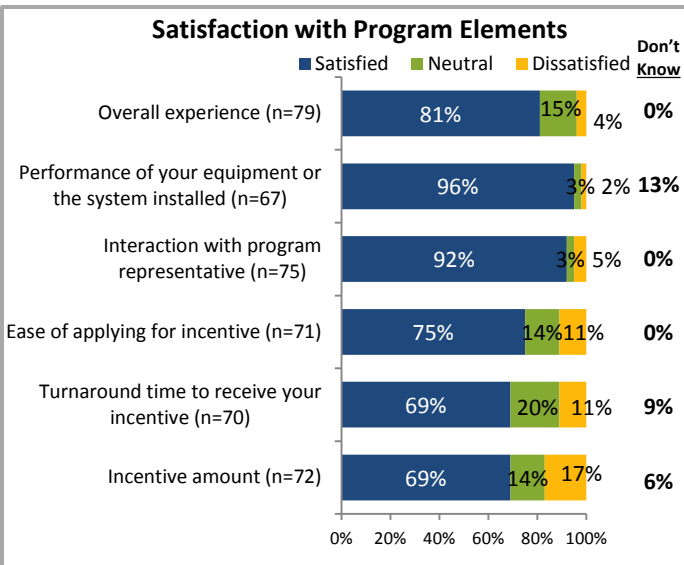
New Buildings & Multifamily

- 81% of respondents rated their satisfaction with Energy Trust a 4 or 5 out of 5, in line with 2011 (83%) and continuing a trend of highly variable satisfaction rates. It is still proving difficult to reach an owner or owner representative for the survey. Satisfaction was lowest for the turnaround time to receive the incentive and the incentive amount.
- 35% of respondents would have done the project the exact same way; 29% would have installed less efficient equipment without Energy Trust incentives and information.

Role on Project (n=79)	
Owner	33%
Contractor	6%
Consultant	11%
Other	47%
Don't know	3%

Are you currently working on any projects that will be required to meet the 2010 energy code? (n=79)	
Yes	48%
No	43%
Don't know	9%

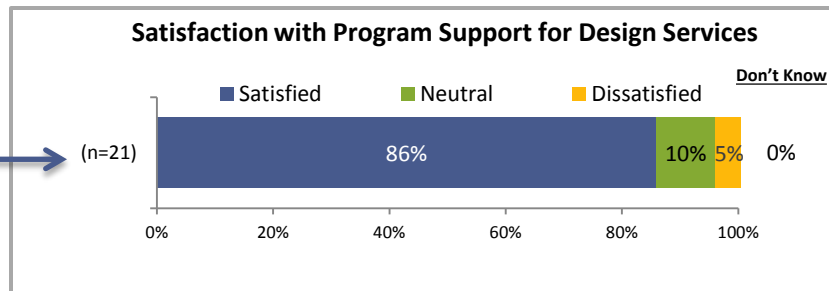
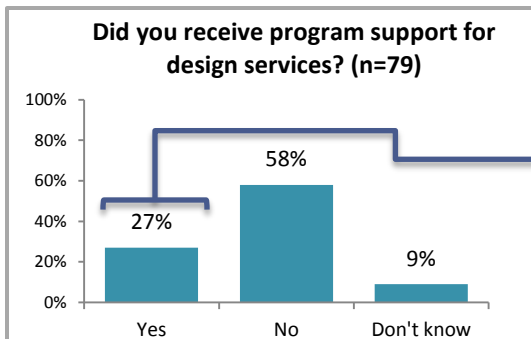
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Support for Design Services



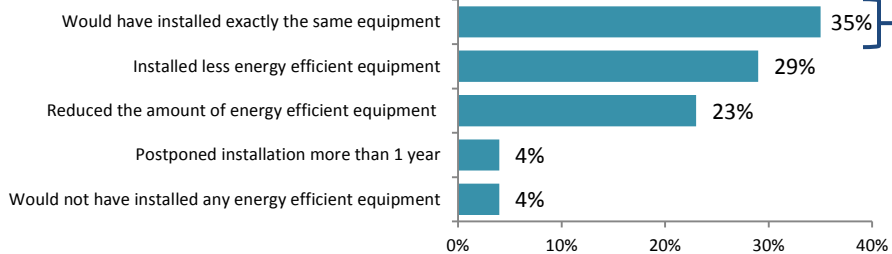
Survey questions:

- Did you receive program support for design services?
- Please rate your satisfaction with the quality of program support for design services on a scale of 1 to 5 where 1 means not at all satisfied and 5 means very satisfied.

New Buildings & Multifamily

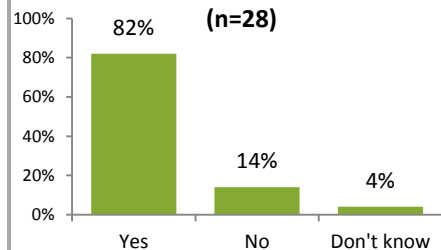
Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=79)*



*Multiple responses possible

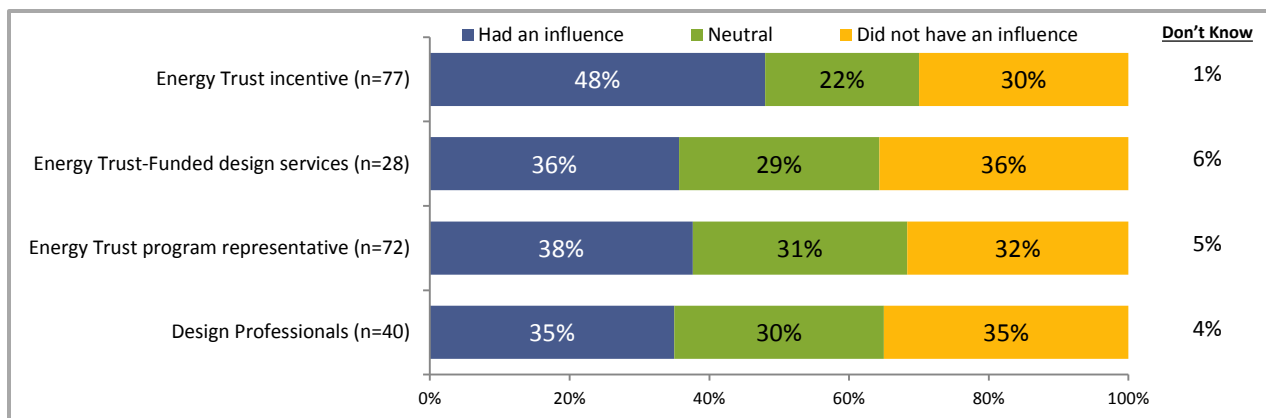
Would project cost have been covered without incentive? (n=28)



Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- If your firm had not received the incentive, would it have made available the funds needed to cover the entire cost of the energy efficient equipment and design?

Influences on Decision to Incorporate Energy Efficient Features in Project



Survey question:

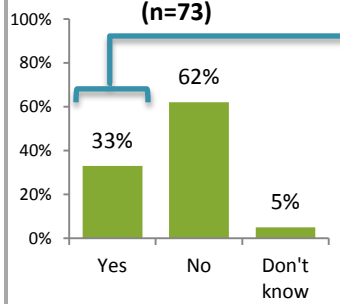
- How influential were the following elements on your decision to incorporate energy efficient features in your project?

Oregon Business Energy Tax Credit

Have you applied for the Oregon Business Energy Tax Credit? (n=79)

Yes	14%
No, but plan to	8%
No, do not plan to	43%
Don't know	22%
Not applicable	14%

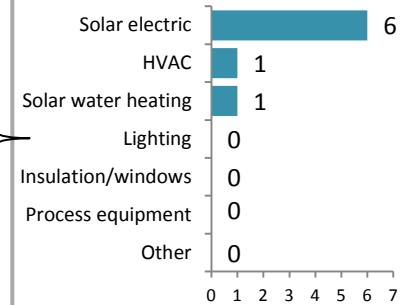
Aware of Changes in 2011 to State Business Energy Tax Credit? (n=73)



Effect of Changes to State Energy Tax Credit (n=24)

No effect	67%
Reduced scope of project	17%
Cancelled project	8%
Delayed project	13%
Don't know	4%

Equipment or Design Affected (n=7)*



*Multiple responses possible

Survey questions:

- Have you applied for the Oregon state business energy tax credit for this project?
- Are you aware of the changes that occurred in 2011 to the state business energy tax credit?
- Have the changes in the tax energy credit caused you to reduce, cancel or delay any previous plans to install energy efficient or renewable energy equipment or design in your building?
- What equipment or design was affected? Was it...

Industrial Sector Summary

- A sufficient number of surveys were completed for results to meet the goal of 90% confidence / 10% margin of error.
- 97% of respondents rated their overall satisfaction a 4 or 5 out of 5.
- Free ridership was 16% and 26% for electric and gas projects, respectively. These numbers are in line with 2011 free ridership numbers for electric (14%) and gas (20%) projects.

Program	2012 Projects [§]	Completed
Production Efficiency*	621	191

*Contains subquotas for program tracks to ensure a variety of project types were surveyed.

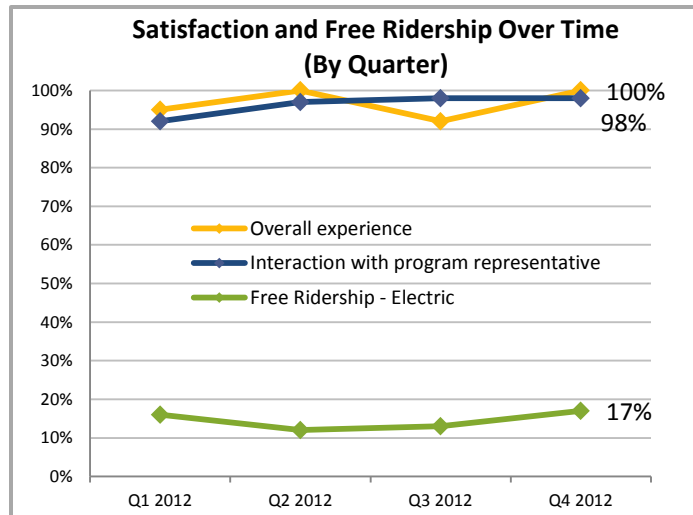
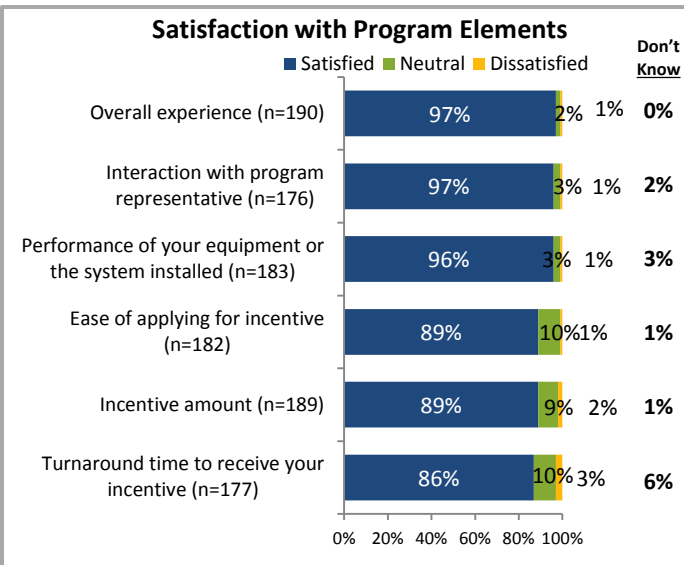
[§] Project totals for 2012 only include projects eligible for Fast Feedback, and therefore may not match other Energy Trust reports for 2012.

Program	Percent Satisfied	Free Ridership (savings-weighted)	
		Electric	Gas
Production Efficiency	97%	16%	26%

Production Efficiency

- A high number of respondents (97%) rated their overall satisfaction a 4 or 5 out of 5, up slightly from 2011 (91%). Satisfaction was very high for interaction with program representatives, performance of equipment or system installed, and study quality.
- 31% would not have installed any energy efficiency equipment, and 29% would have postponed the project more than a year in the absence of the program. Only 16% would have installed the same equipment or features.
- Incentives had the most influence on projects.
- 23% have applied for the Business Energy Tax Credit and 16% plan to do so.

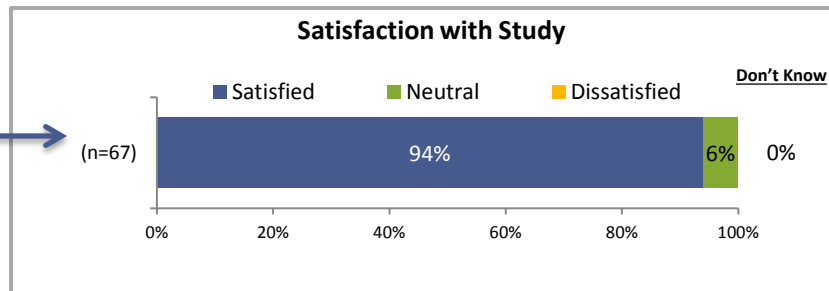
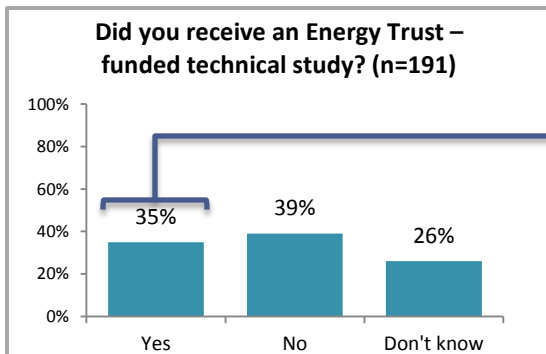
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Energy Trust Funded Study



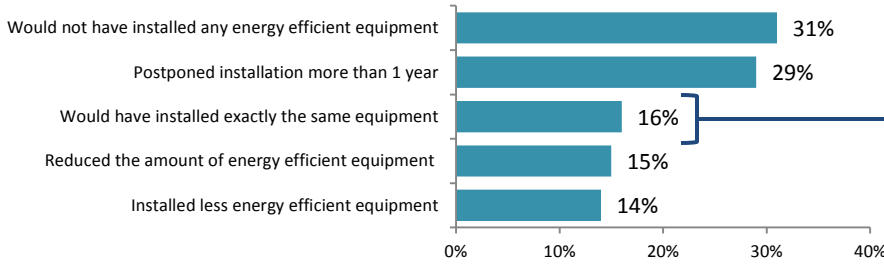
Survey questions:

- Did you receive an Energy Trust – funded technical study?
- Please rate your satisfaction with the quality of the study on a scale of 1 to 5 where 1 means not at all satisfied and 5 means very satisfied.

Production Efficiency

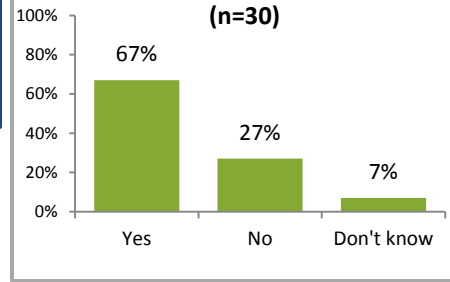
Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=191)*



*Multiple responses possible

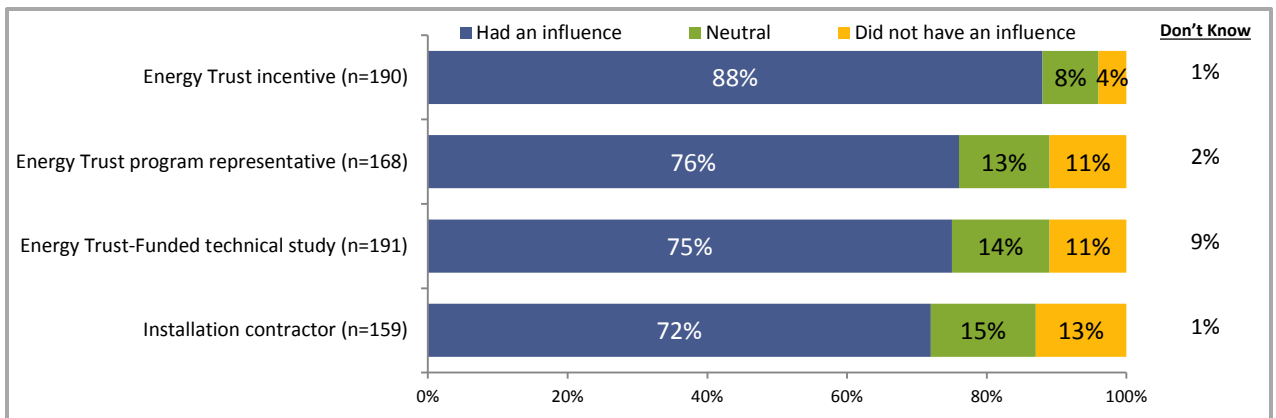
Would project cost have been covered without incentive? (n=30)



Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- If your firm had not received the incentive, would it have made available the funds needed to cover the entire cost of the energy efficient equipment and design?

Influences on Decision to Incorporate Energy Efficient Features in Project



Survey question:

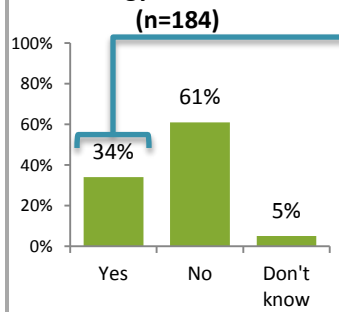
- How influential were the following elements on your decision to incorporate energy efficient features in your project?

Oregon Business Energy Tax Credit

Have you applied for the Oregon Business Energy Tax Credit? (n=168)

Yes	23%
No, but plan to	16%
No, do not plan to	29%
Don't know	29%
Not applicable	4%

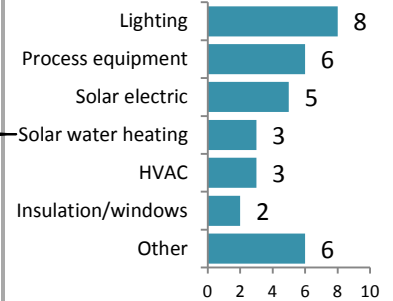
Aware of Changes in 2011 to State Business Energy Tax Credit? (n=184)



Effect of Changes to State Energy Tax Credit (n=62)

No effect	52%
Reduced scope of project	13%
Cancelled project	13%
Delayed project	21%
Don't know	7%

Equipment or Design Affected (n=24)*



*Multiple responses possible

Survey questions:

- Have you applied for the Oregon state business energy tax credit for this project?
- Are you aware of the changes that occurred in 2011 to the state business energy tax credit?
- Have the changes in the tax energy credit caused you to reduce, cancel or delay any previous plans to install energy efficient or renewable energy equipment or design in your building?
- What equipment or design was affected? Was it...

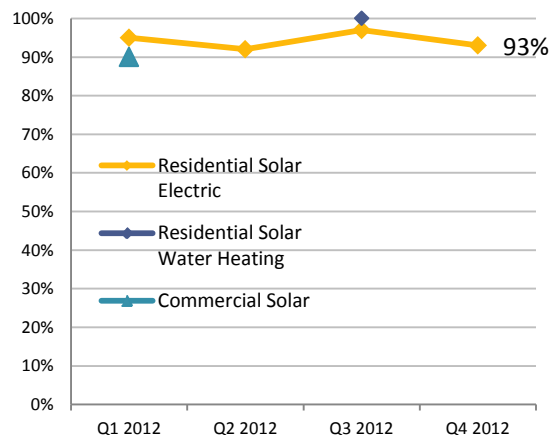
Solar Summary

- Fast Feedback surveys were completed with enough participants for results to meet the criteria of 90% confidence / 10% margin of error for residential solar electric. We were unable to complete a sufficient number of surveys for the other groups to meet 90% confidence / 10% margin of error due to the small population size and low project volume.
- Satisfaction among all commercial solar participants was 89%, in line with 2011 (91%). Satisfaction for residential solar electric and solar water heating was high, and in line with 2011.

Program	2012 Projects [§]	Surveys Completed	Percent Satisfied
Commercial Solar Electric	55	16	88%
Commercial Solar Water Heating	5	1	1 of 1
Residential Solar Electric	486	149	95%
Residential Solar Water Heating	24	14	93%

[§] Project totals for 2012 only include projects eligible for Fast Feedback, and therefore may not match other Energy Trust reports for 2012.

Satisfaction Over Time (By Quarter)



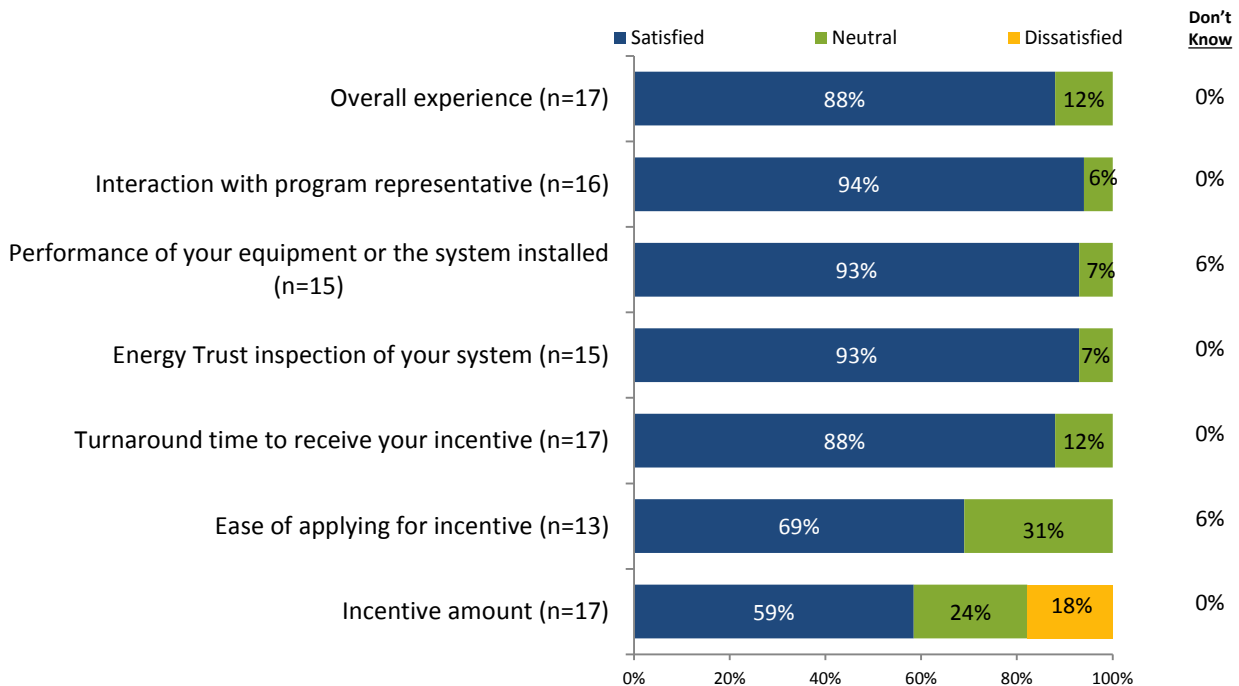
Note: The number of respondents for commercial solar was extremely low for most of 2012: 2 in Q2, 3 in Q3, and 2 in Q4. Residential solar water heating had fewer than 5 respondents per quarter except for Q3 2012.

Commercial Solar

- Due to small population sizes, we were unable to survey enough respondents to meet the goal of 90% confidence / 10% margin of error.
- 88% of respondents rated their overall satisfaction a 4 or 5 out of 5. Satisfaction was high with program representative (94%) and the performance of the system (93%). The lowest satisfaction rating was for incentive amount (59% satisfied).
- About 60% of respondents would not have installed the system without Energy Trust incentives; 6% would have installed exactly the same system.
- Energy Trust incentives were the most influential on the decision to install the system (100% rating a 4 or 5 out of 5), followed by the contractor (77%).
- About two-thirds of respondents applied for the federal tax credit; two-thirds of respondents also said they applied for the state tax credit.

Participant Satisfaction

Satisfaction with Program Elements



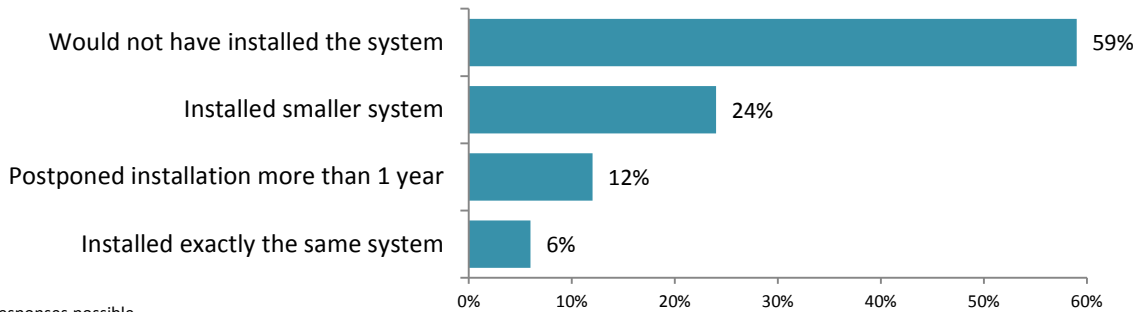
Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Commercial Solar

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=17)*

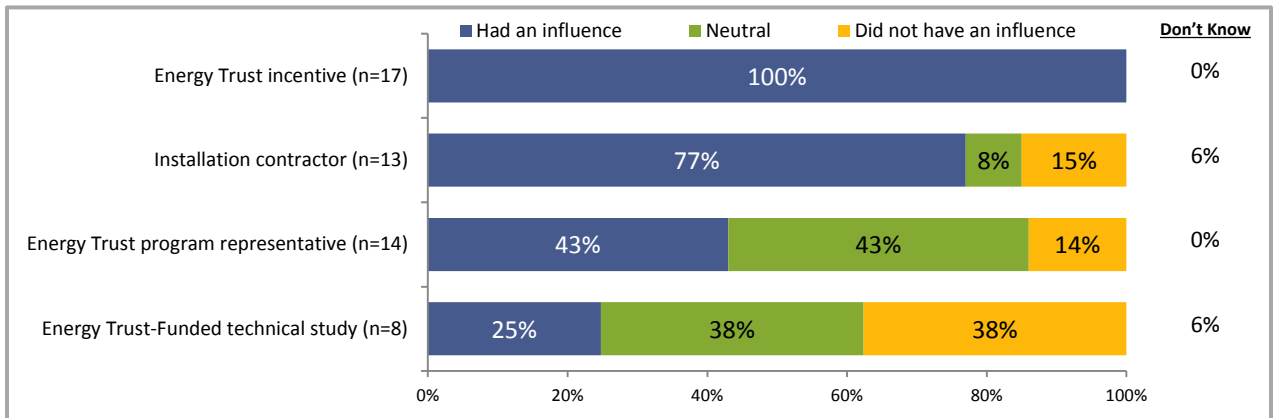


*Multiple responses possible

Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Influences on Decision to Install Solar



Survey question:

- How influential were the following elements on your decision to install the system?

Oregon Business Energy Tax Credit

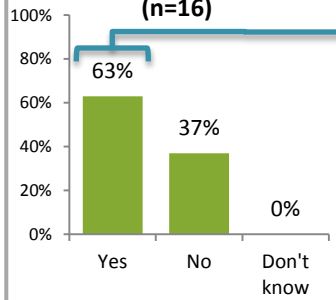
Have you applied for the Federal Tax Credit?

	(n=17)
Yes	65%
No	24%
Don't know	12%

Have you applied for the Oregon Business Energy Tax Credit?

	(n=17)
Yes	65%
No, but plan to	6%
No, do not plan to	6%
Don't know	18%
Not applicable	6%

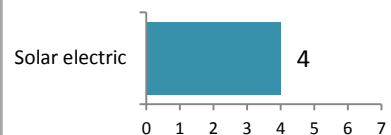
Aware of Changes in 2011 to State Business Energy Tax Credit? (n=16)



Effect of Changes to State Energy Tax Credit (n=10)

Effect	Percentage
No effect	60%
Reduced scope of project	10%
Cancelled project	40%
Delayed project	10%
Don't know	0%

Equipment or Design Affected (n=4)*



*Multiple responses possible

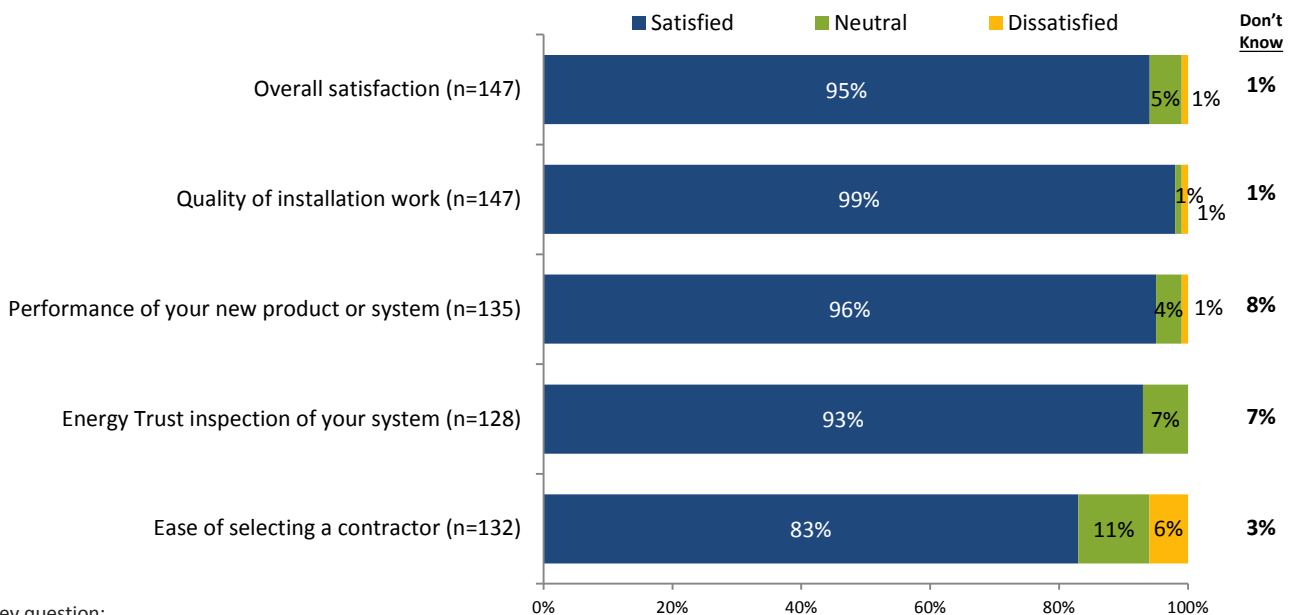
Survey questions:

- Have you applied or will you apply for a federal tax credit for the system you installed?
- Are you aware of the changes that occurred in 2011 to the state business energy tax credit?
- Have the changes in the tax energy credit caused you to reduce, cancel or delay any previous plans to install energy efficient or renewable energy equipment or design in your building?
- What equipment or design was affected? Was it...

Residential Solar Electric

- 95% of respondents rated their overall satisfaction a 4 or 5 out of 5, in line with 2011 (94%).
- Just under half of respondents had visited the website or received a brochure before having their system installed.
- 46% of respondents would not have installed the system without Energy Trust incentives and information; 19% would have installed the same system.
- Energy Trust incentives were the most influential element on the decision to install the system, followed by the contractor and solar energy review (for those that received one).
- Two-thirds of respondents paid for their system with cash or savings, while 11% used a home equity loan or line of credit.

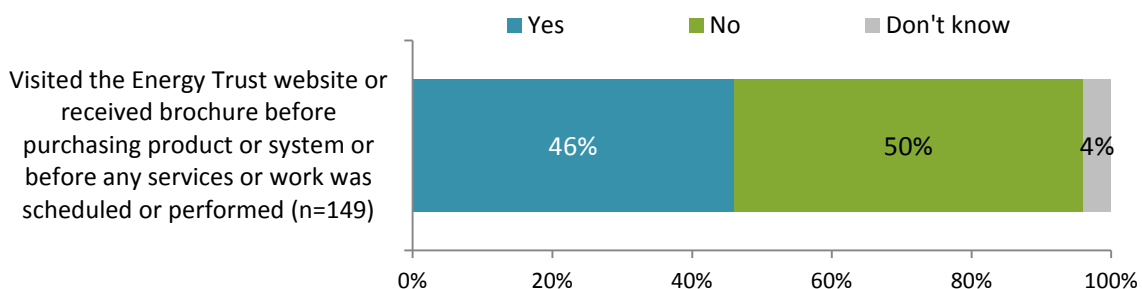
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



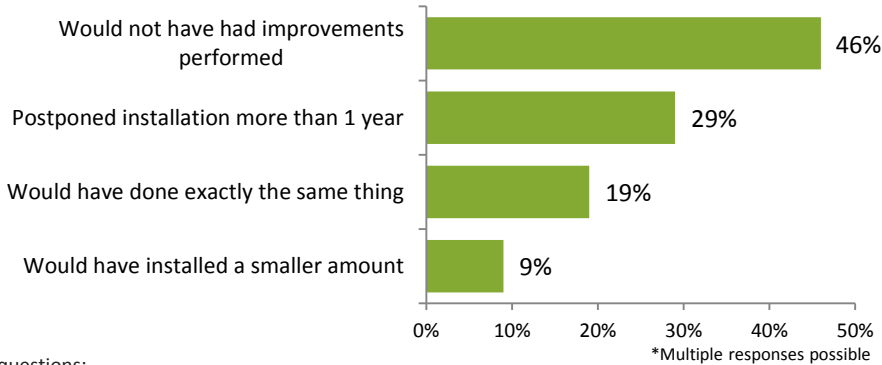
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Residential Solar Electric

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=149)*



Have you or will you apply for the Oregon State Residential Energy Tax Credit? (n=149)

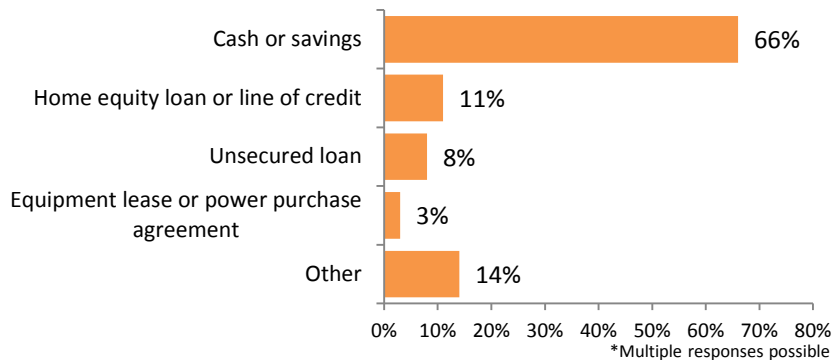
Yes	94%
No	3%
Don't know	3%

Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- Have you applied or will you apply for the applicable Oregon State Residential Energy Tax Credit?

Funding for New System

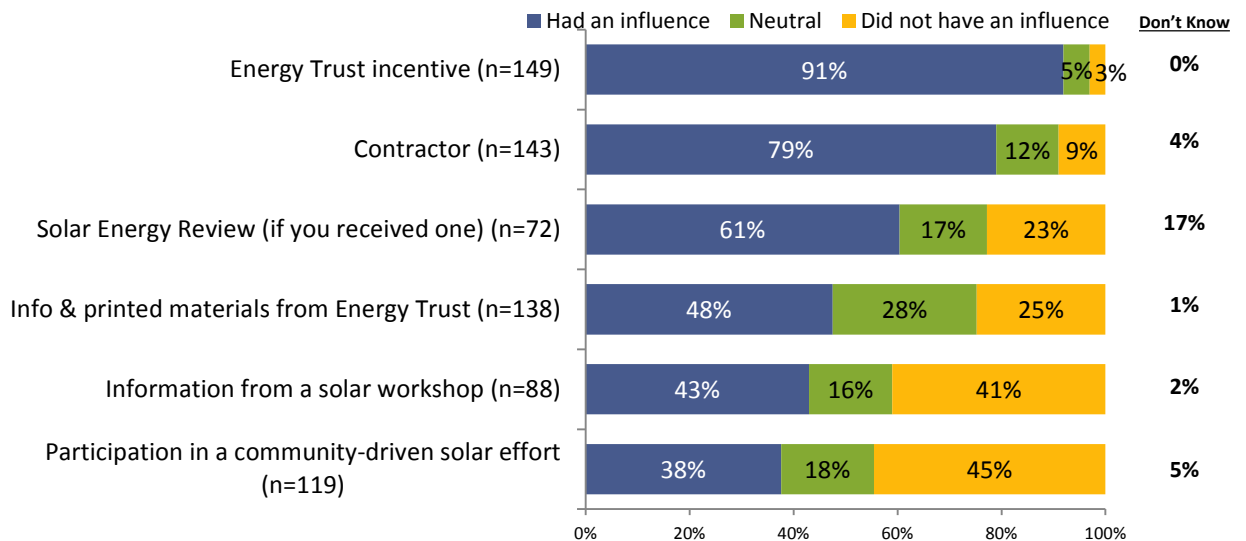
How Respondents Paid for System (n=149)*



Survey question:

- How did you pay for your system?

Influences on Decision to Install Solar



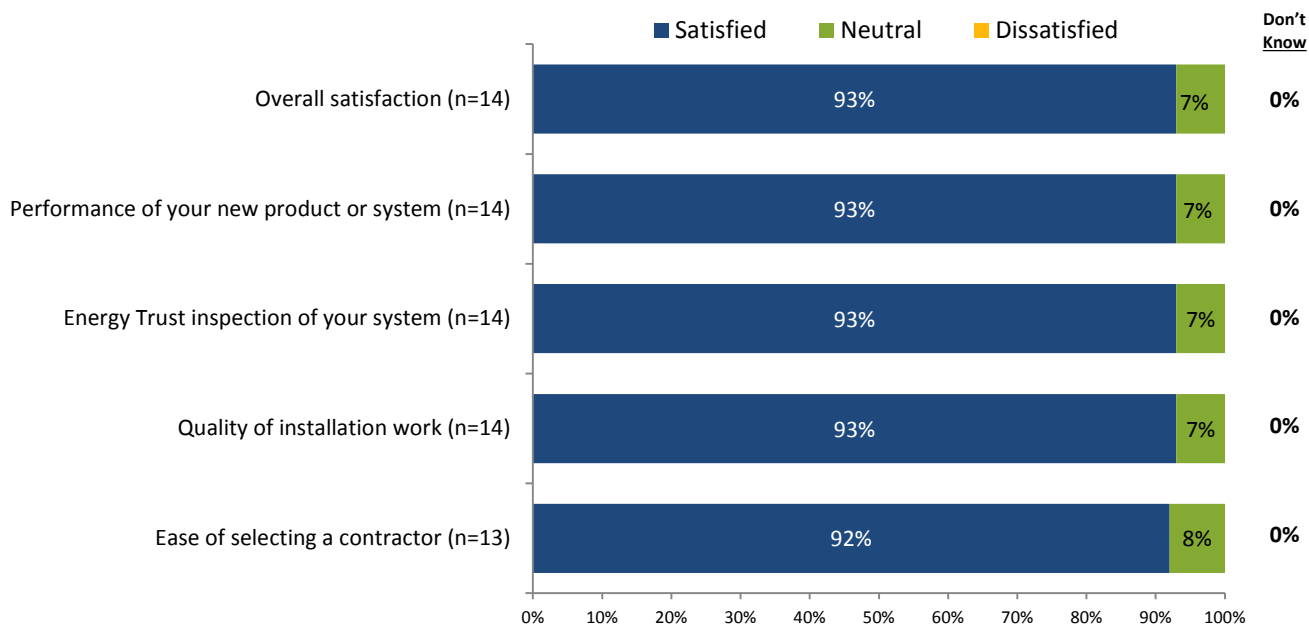
Survey question:

- How influential were the following elements on your decision to purchase your system?

Residential Solar Water Heating

- 93% of respondents rated their overall satisfaction a 4 or 5 out of 5, down slightly from 2011 (100%).
- Over 70% of respondents had visited the website or received a brochure before having their system installed.
- 29% of respondents would have installed the same system without the Energy Trust incentives and information; 36% would not have had improvements done.
- Energy Trust incentives and the contractor were influential for all respondents on the decision to install the system.
- Two-thirds of respondents paid for their system with cash or savings.

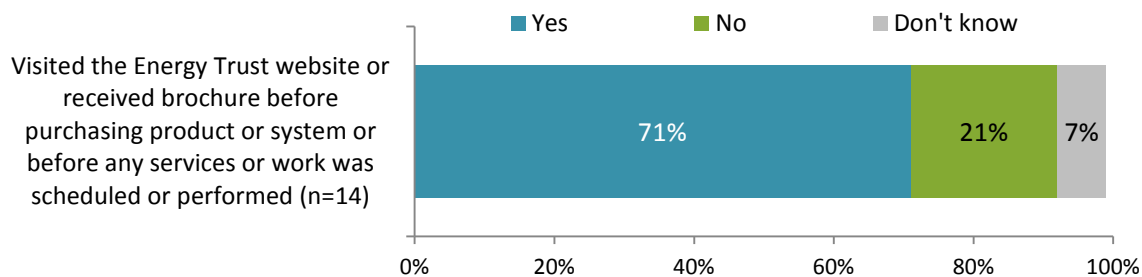
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



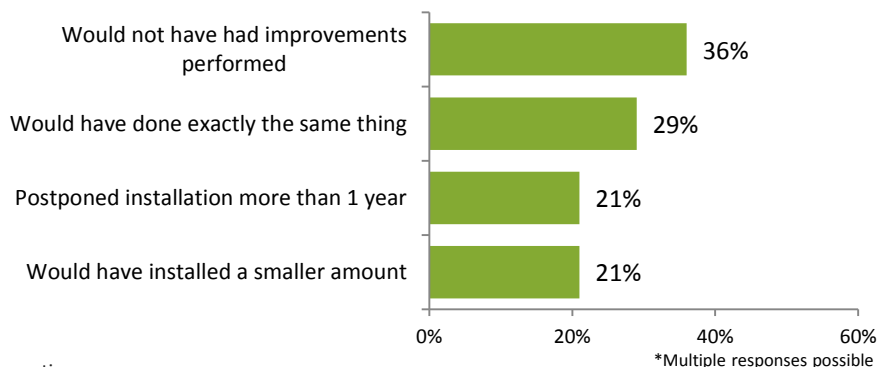
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Residential Solar Water Heating

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=14)*



Have you or will you apply for the Oregon State Residential Energy Tax Credit? (n=14)

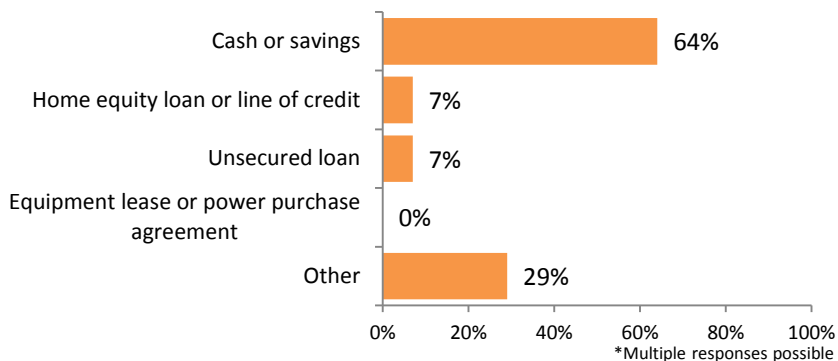
Yes	79%
No	7%
Don't know	0%
Does not apply	14%

Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- Have you applied or will you apply for the applicable Oregon State Residential Energy Tax Credit?

Funding for New System

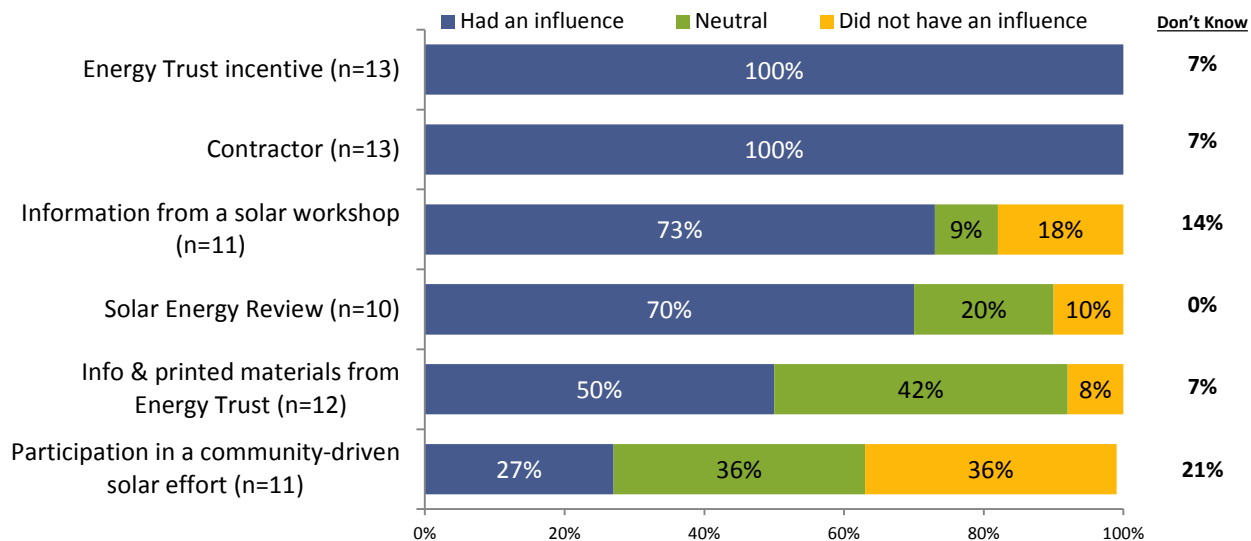
How Respondents Paid for System (n=14)*



Survey question:

- How did you pay for your system?

Influences on Decision to Install Solar



Survey question:

- How influential were the following elements on your decision to purchase your system?

Home Products Summary

- For all three measures, enough surveys were completed for the results to meet the goal of 90% confidence / 10% margin of error.
- Satisfaction for all three measures was relatively high, especially for refrigerator recycling, and in line with 2011 results.
- Free ridership for all home products measures was also in line with 2011 results.

Program	2012 Projects [§]	Surveys Completed	Percent Satisfied	Free Ridership
Clothes Washers	18,546	278	90%	51%
Refrigerators	8,109	126	92%	52%
Refrigerator Recycling	17,535	279	96%	32%

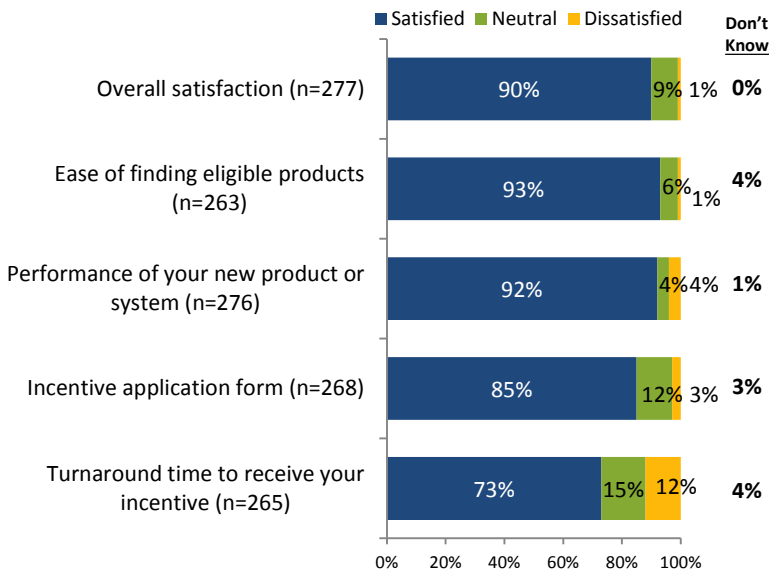
[§] Project totals for 2012 only include projects eligible for Fast Feedback, and therefore may not match other Energy Trust reports for 2012.

Clothes Washers

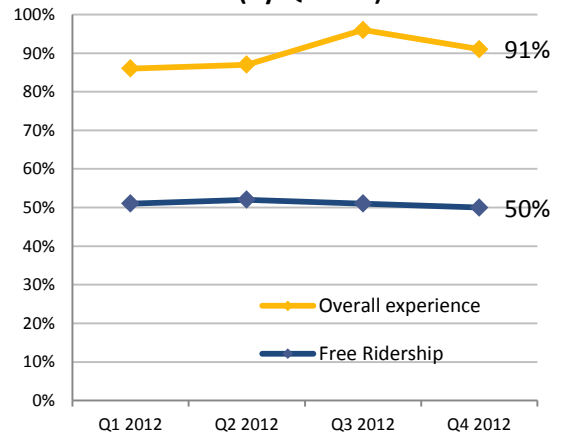
- 90% of respondents rated their overall satisfaction a 4 or 5 out of 5. Satisfaction with turnaround time received the lowest rating.
- 23% had used the website or received a brochure before purchasing their unit.
- 71% of respondents would have bought the same unit in the absence of Energy Trust incentives and information; however, 64% rated the influence of the Energy Trust incentive a 4 or 5 out of 5.
- The percent of respondents washing more than 60% of loads in cold water has remained around 50%, in line with 2011.

Participant Satisfaction

Satisfaction with Program Elements



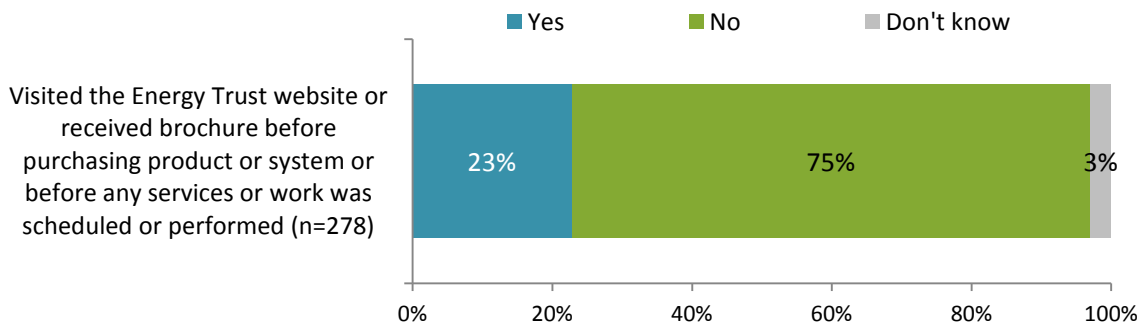
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



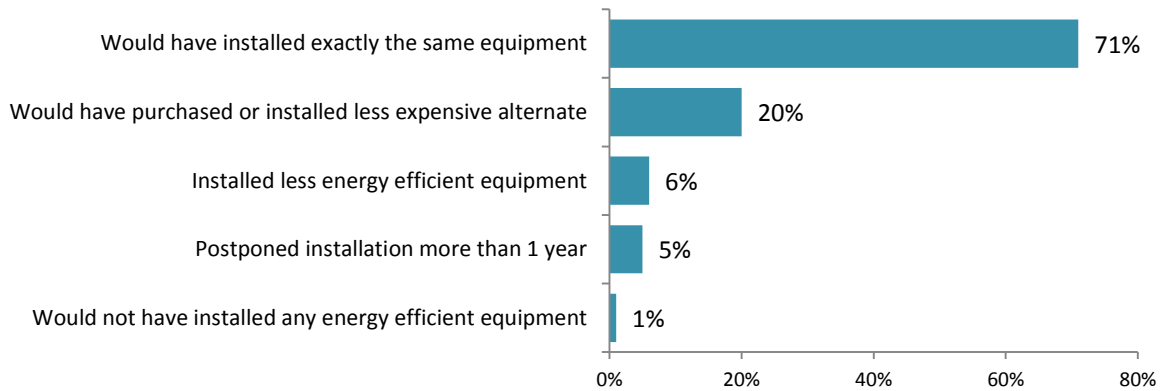
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Clothes Washers

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=278)*

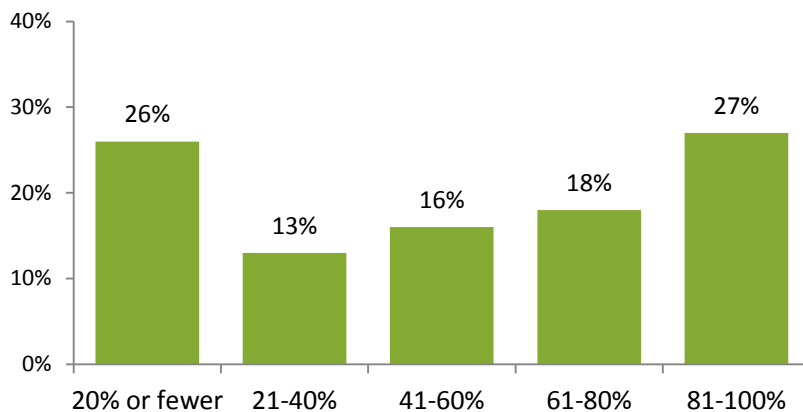


*Multiple responses possible

Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

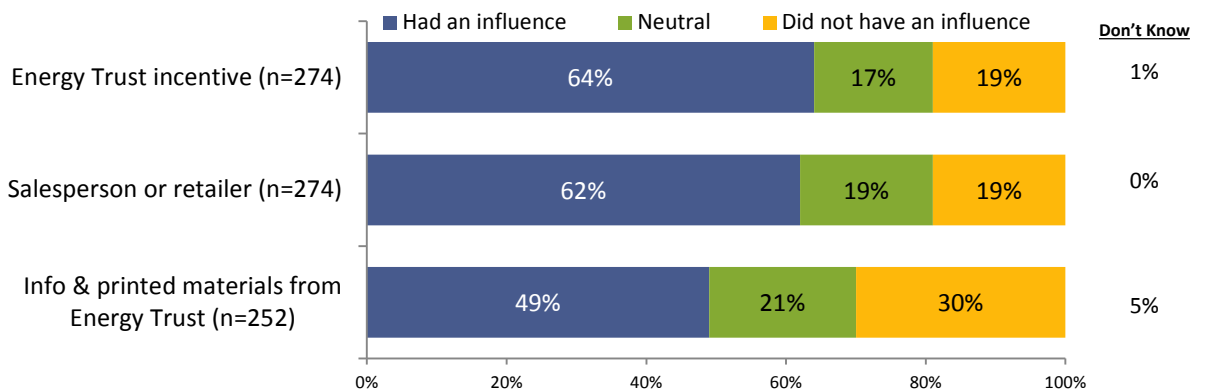
Percent of Laundry Loads Done in Cold Water (n=262)



Survey question:

- What percent of laundry loads do you wash in cold water?

Influences on Decision to Purchase Energy Efficient Unit



Survey question:

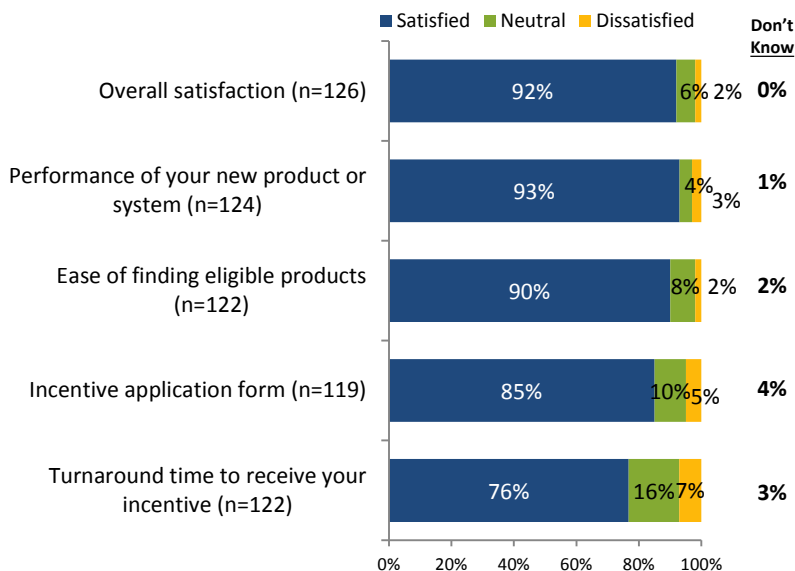
- How influential were the following elements on your decision to purchase your product?

Refrigerators

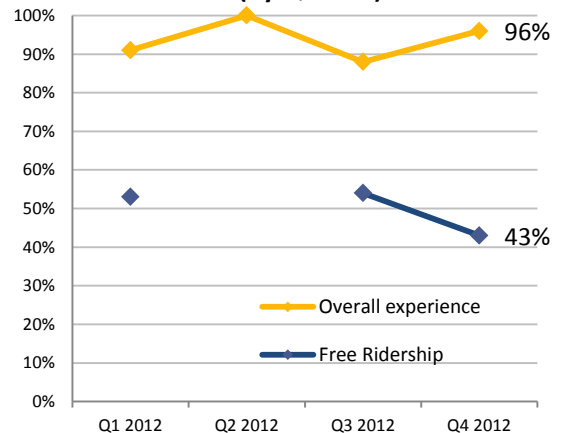
- 92% of respondents rated their overall satisfaction a 4 or 5 out of 5. 90% of respondents were satisfied with the performance of their new refrigerator and ease of finding eligible products.
- About one-quarter of respondents visited the website or received a brochure before recycling their unit.
- 69% would have gotten the same refrigerator even without the incentive and information from Energy Trust.
- 77% of respondents said the purchased unit was replacing an old unit. 43% of the old units were recycled through Energy Trust and another 24% had the old unit removed by the retailer who delivered their new refrigerator.
- Respondents reported the incentive had the greatest influence on choice of refrigerator.

Participant Satisfaction

Satisfaction with Program Elements



Satisfaction and Free Ridership Over Time (By Quarter)

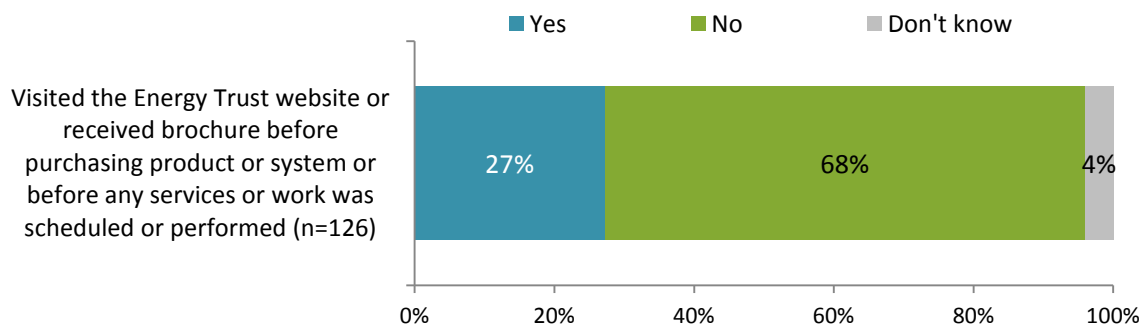


Note: Only 3 participants were surveyed in Q2 2012.

Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



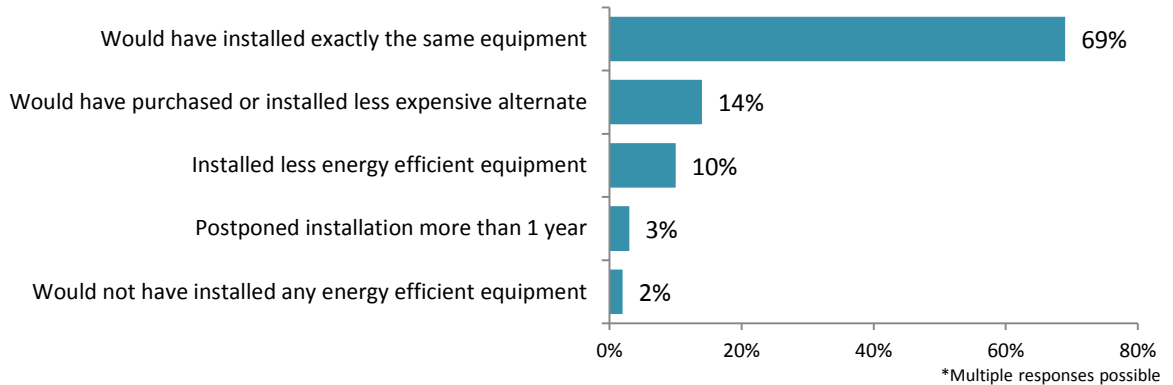
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Refrigerators

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=126)*

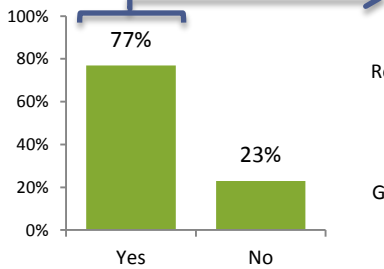


Survey question:

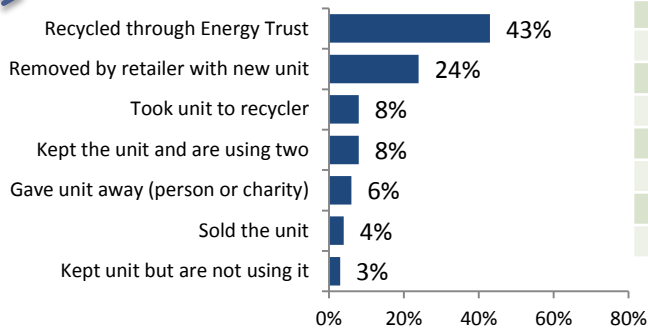
- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Household Refrigerator and Freezer Units

Did Refrigerator Just Purchased Replace an Old Unit? (n=126)



What was done with the old unit? (n=97)



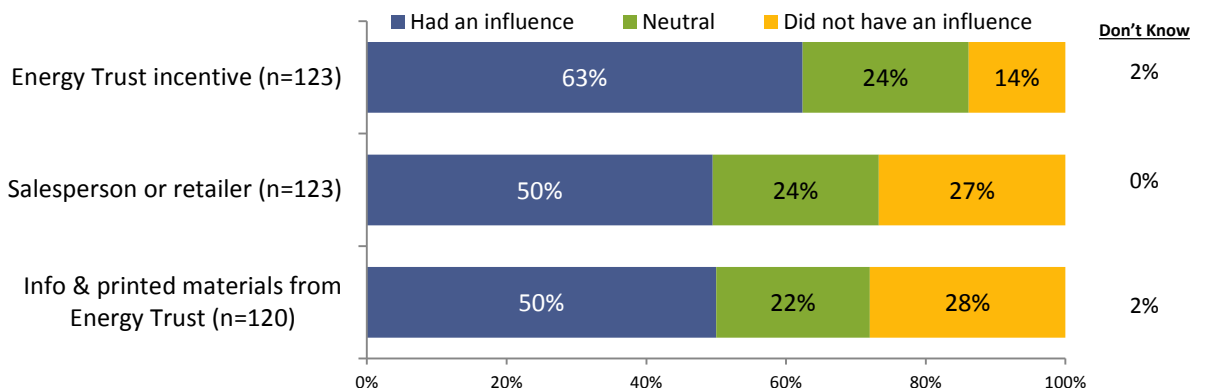
How many refrigerators and freezers do you currently have in your home?

Refrigerators (n=126)	
One	57%
Two	38%
Three or more	3%
Freezers (n=126)	
None	49%
One	43%
More than one	6%

Survey questions:

- Did the refrigerator you purchased replace an old unit?
- What did you do with your old unit?
- How many refrigerators do you currently have in your home?
- And how many freezers do you currently have in your home?

Influences on Decision to Purchase Energy Efficient Unit



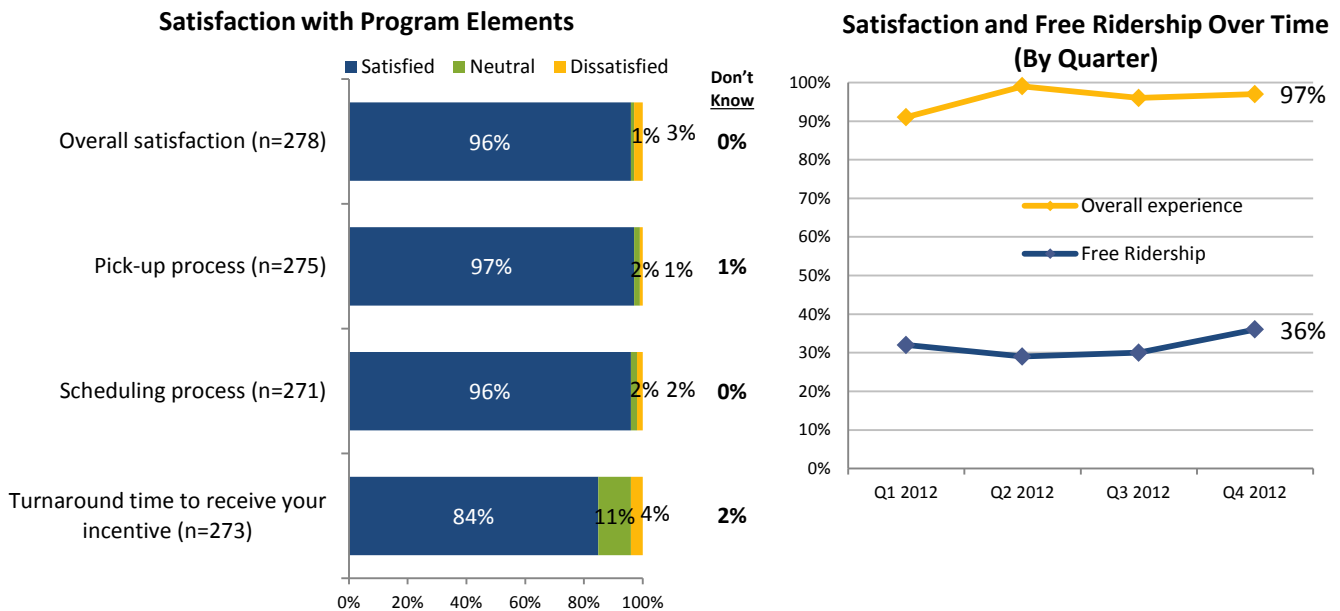
Survey question:

- How influential were the following elements on your decision to purchase your product?

Refrigerator Recycling

- 96% of respondents rated their overall satisfaction a 4 or 5 out of 5. 97% were satisfied with the pick-up process and 96% were satisfied with the scheduling process.
- 46% visited the website or received a brochure before recycling their unit.
- Free pick-up and removal and Energy Trust incentives were both highly influential (94% and 86%, respectively rating a 4 or 5 out of 5).
- 79% of respondents indicated that they were replacing the old unit; the majority of those were replacing with a new unit.

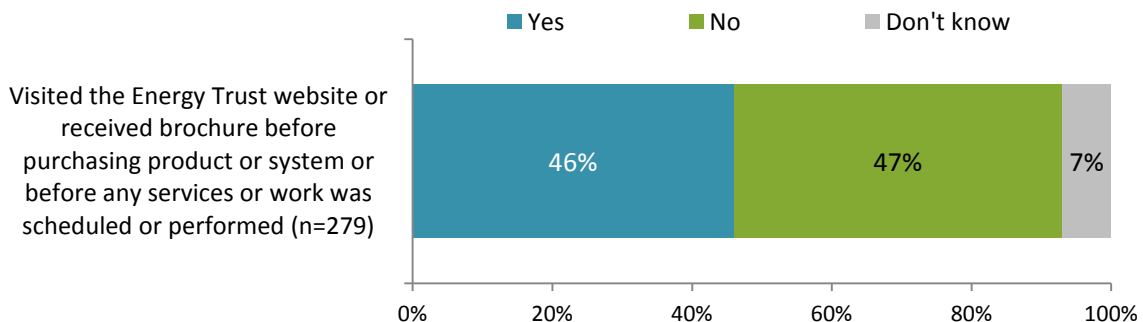
Participant Satisfaction



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



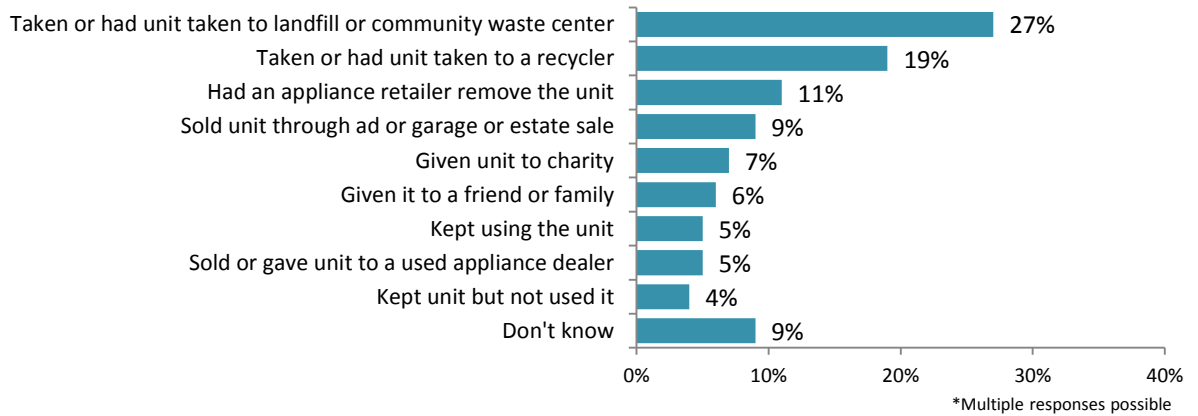
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Refrigerator Recycling

Impact of Incentives

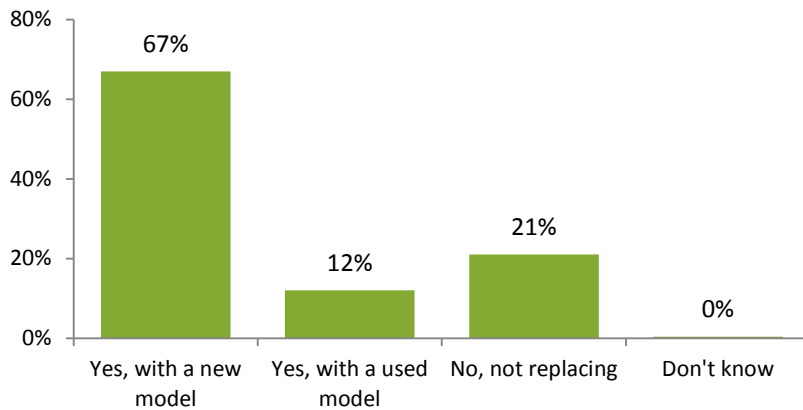
Actions Would Have Taken Without Incentive or Information (n=279)*



Survey question:

• Please describe the actions you would have taken had the Energy Trust fridge recycling incentive and information not been available....

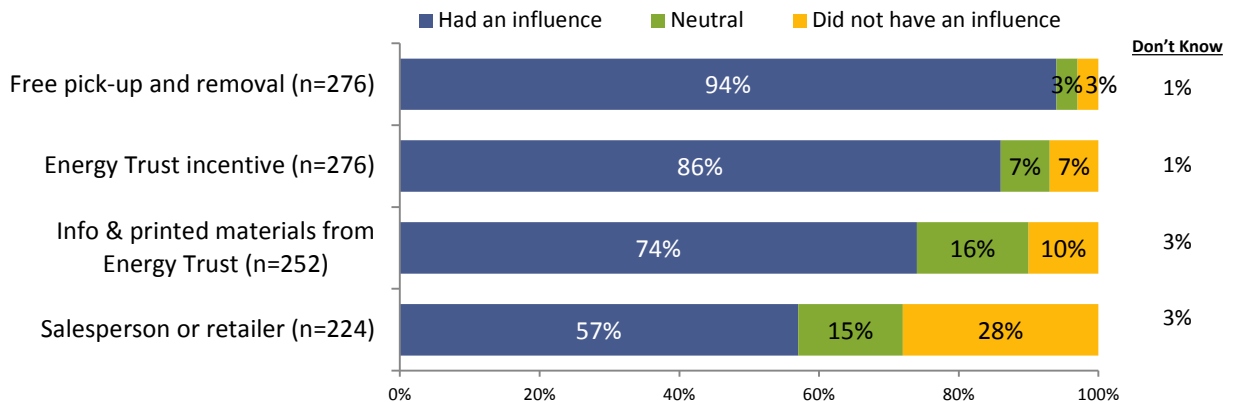
Replacing the Refrigerator (n=279)



Survey question:

• Are you replacing, or have you replaced the refrigerator that was recycled?

Influences on Decision to Recycle Refrigerator



Survey question:

• How influential were the following elements on your decision to have services or work performed?

Existing Homes Summary

- For all measures except duct insulation, sample sizes were sufficient to meet the criteria of 90% confidence / 10% margin of error.
- Overall satisfaction with Existing Homes programs was generally high, with at least 85% of respondents for all measure categories indicating they were satisfied. Overall satisfaction for Washington and Oregon respondents was in line with 2011 (91% and 86% in 2011, respectively).
- Free ridership for most measures remained in line with 2011 numbers. However, free ridership for all insulation measures increased relative to 2011.

Survey Group	2012 Measures in Oregon [§]	Oregon Surveys Completed	2012 Measures in Washington [§]	Washington Surveys Completed	Satisfaction	Free Ridership [‡]
Air Sealing	698	162	12	5	93%	21%
Ceiling Insulation	1,892	240	24	9	94%	34%
Floor Insulation	1,306	230	11	1	92%	34%
Wall Insulation	462	119	4	1	92%	40%
Duct Insulation	521	39	4	1	88%	23%
Duct Sealing	856	118	43	12	90%	38%
Gas Furnace	--	--	--	41	--	--
Heat Pump	1,282	235	--	--	89%	46%
Water Heaters	827	86	41	7	96%	46% ^α
Windows	2,600	197	73	22	88%	47%
Home Performance	350 ^α	111	10	5	92%	28%
Home Energy Review	3,819	224	164	39	89%	--
Existing Homes – Washington	--	--	--	143	89%	--
Existing Homes – Oregon	--	1,761	--	--	91%	--

[‡] Free ridership estimates for residential measures are calculated for Oregon respondents only.

^α 0.67 residential gas water heaters are part of a market transformation effort; free ridership is shown for information only and will not be the basis for programmatic decisions about the measure.

^α We report number of home performance projects, not measures.

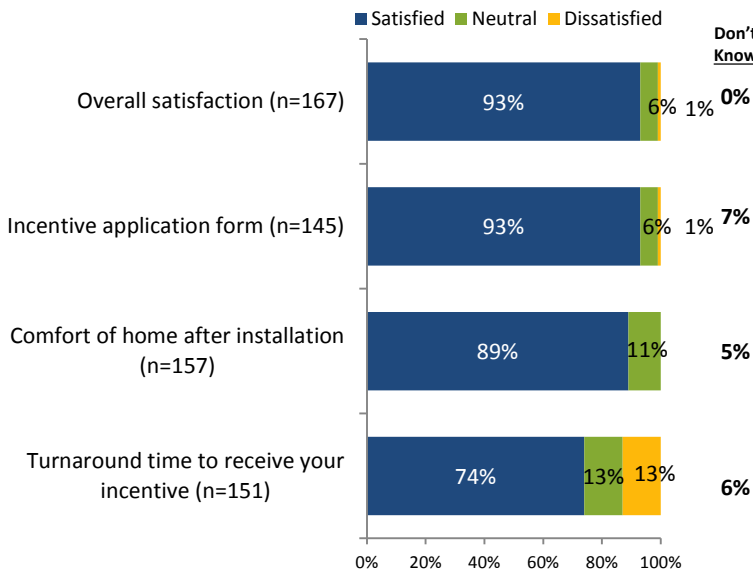
[§] Measure totals for 2012 only include projects eligible for Fast Feedback, and therefore may not match other Energy Trust reports for 2012.

Air Sealing

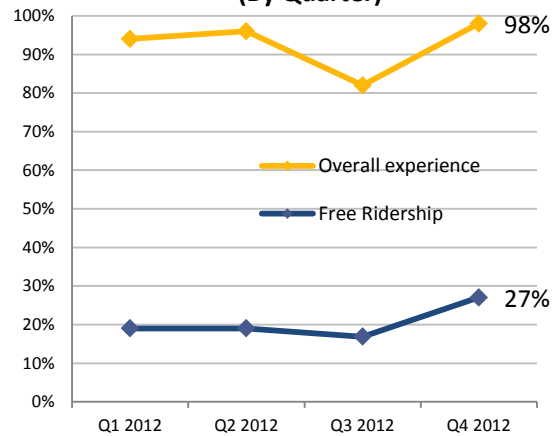
- 93% of respondents rated their overall satisfaction a 4 or 5 out of 5, up slightly relative to 2011 (88%).
- 35% also said they would not have done air sealing without Energy Trust incentives and information, while 26% said they would have done the same work.
- The incentive and the contractor had roughly the same influence on respondents' decisions to do air sealing (84% and 82%, respectively, rating 4 or 5).
- 92% of respondents were satisfied with their contractor; 35% consulted the list of approved trade allies before selecting their contractor.

Participant Satisfaction

Satisfaction with Program Elements



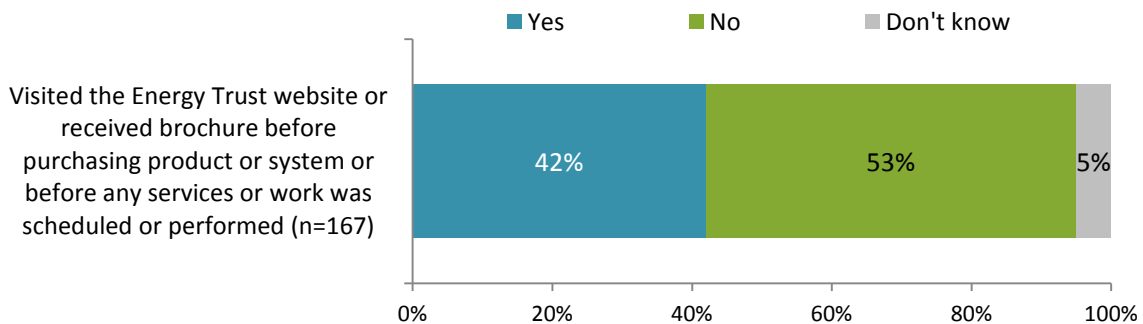
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



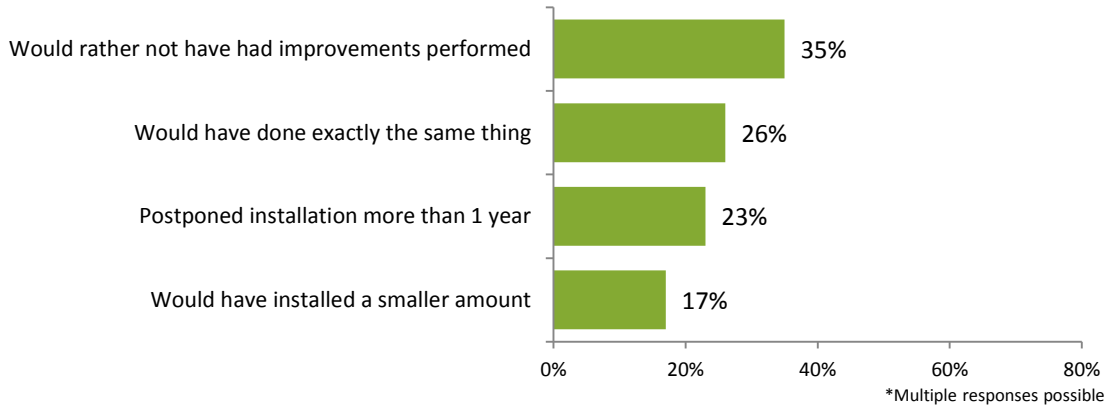
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Air Sealing

Impact of Incentives

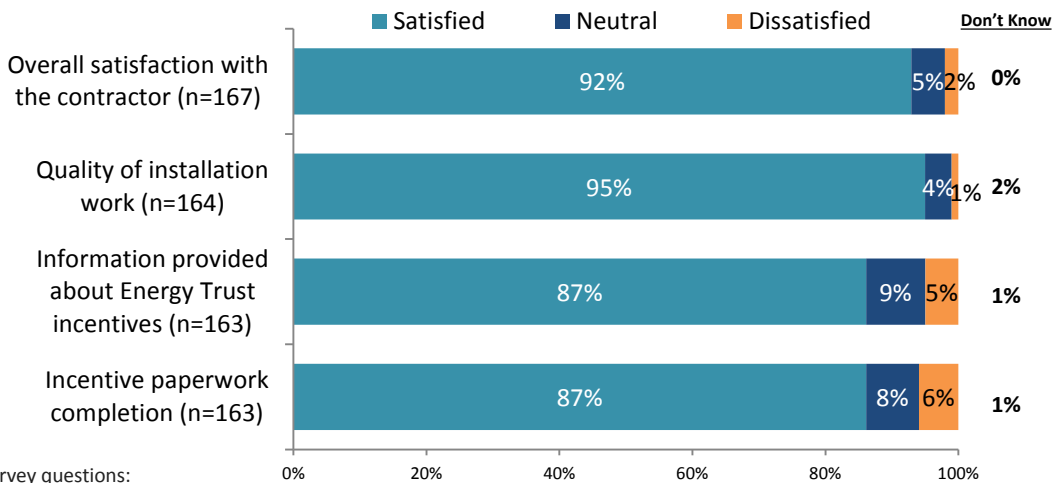
Actions Would Have Taken Without Incentive or Information (n=167)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



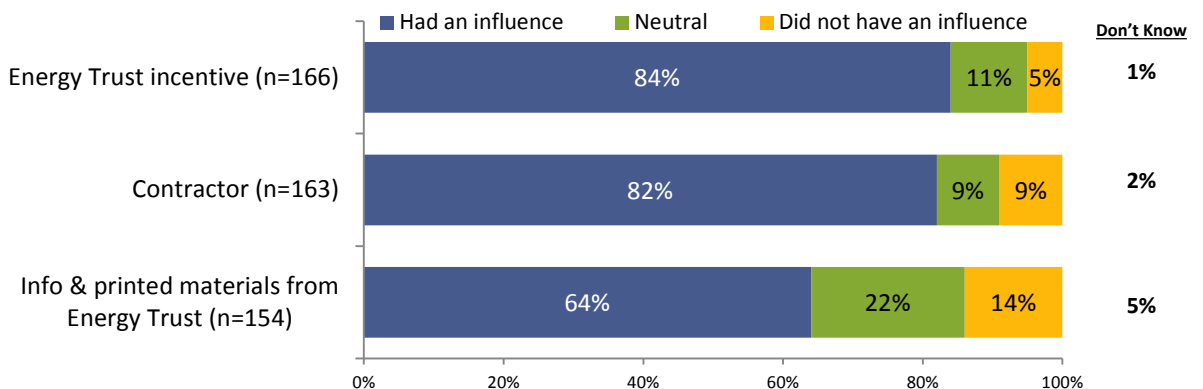
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=167)

Yes	35%
No	61%
Don't know	4%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

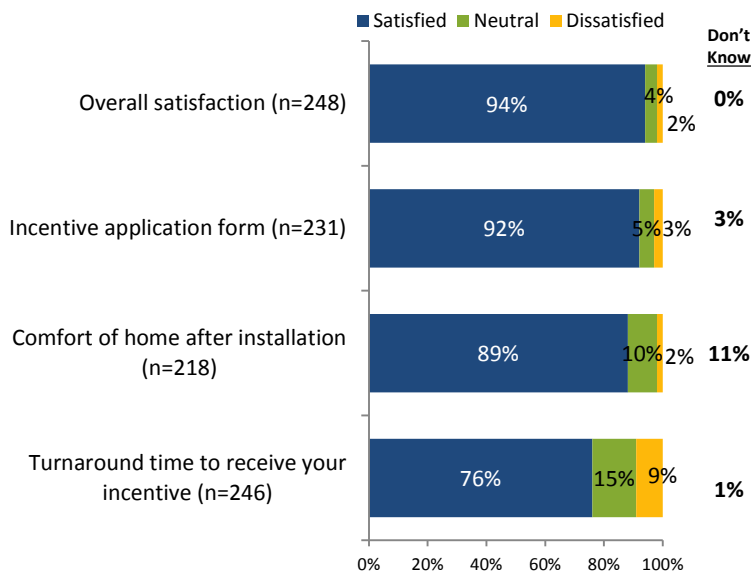
- How influential were the following elements on your decision to have services or work performed?

Ceiling Insulation

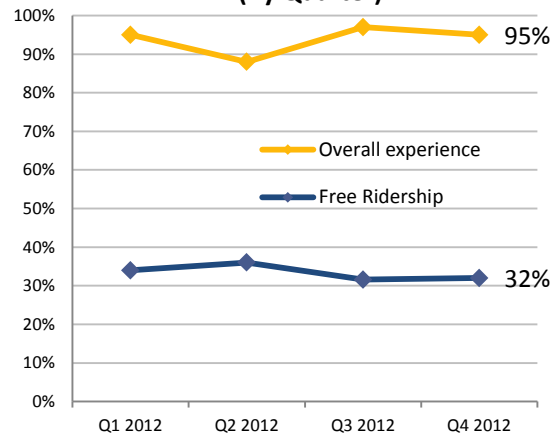
- 94% of respondents rated their overall satisfaction a 4 or 5 out of 5. Satisfaction was lowest with the turnaround time to receive the incentive (76%), but satisfaction with comfort was high (rated 4 or 5 by 89% of respondents).
- 45% of respondents visited our website or received a brochure before installing insulation.
- 50% would have installed insulation without Energy Trust incentives and information, while 26% would have postponed the insulation and 15% would not have installed it at all.
- The incentive was the most influential element of the program in the decision to have ceiling insulation installed (rated 4 or 5 by 74% of respondents), followed by the contractor (73%).
- 93% of respondents were satisfied with their contractor; 27% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



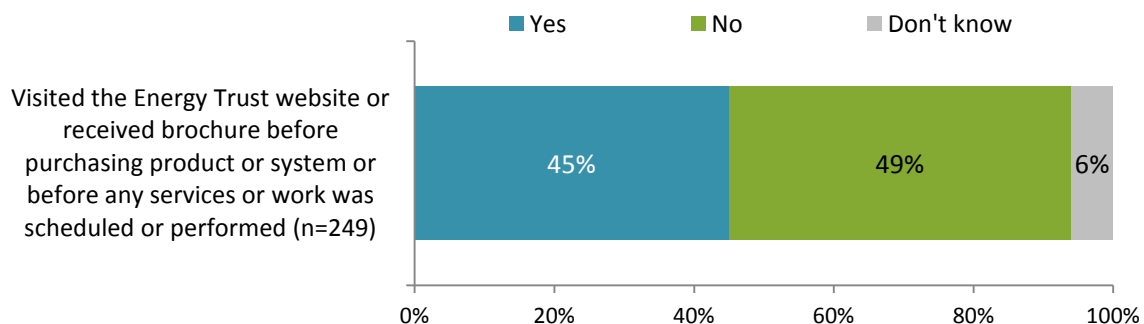
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



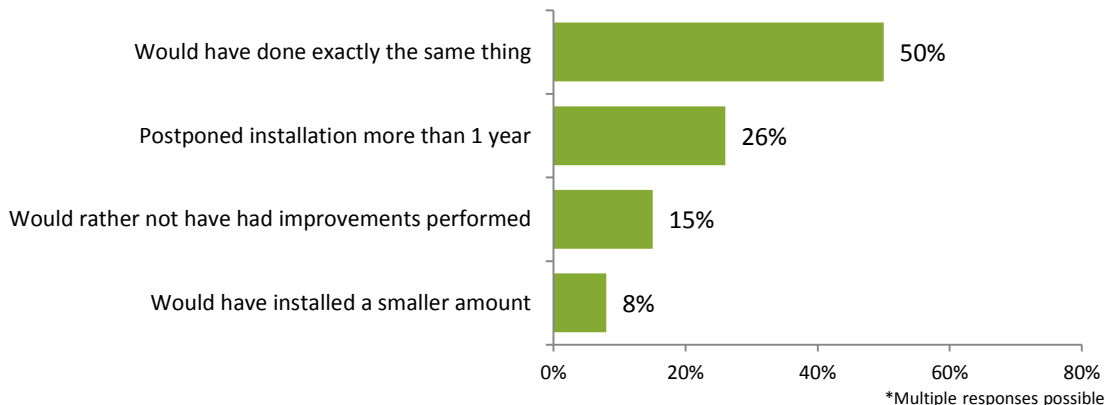
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Ceiling Insulation

Impact of Incentives

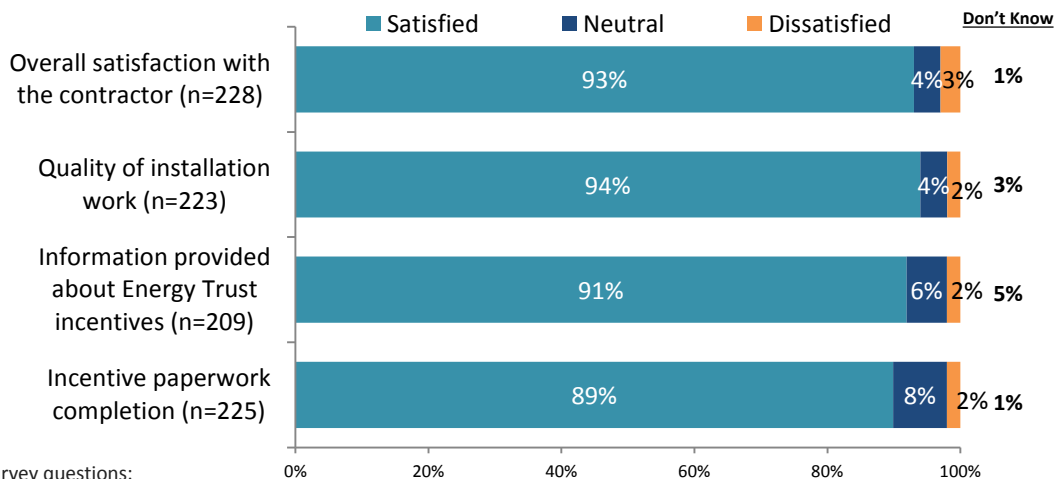
Actions Would Have Taken Without Incentive or Information (n=249)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



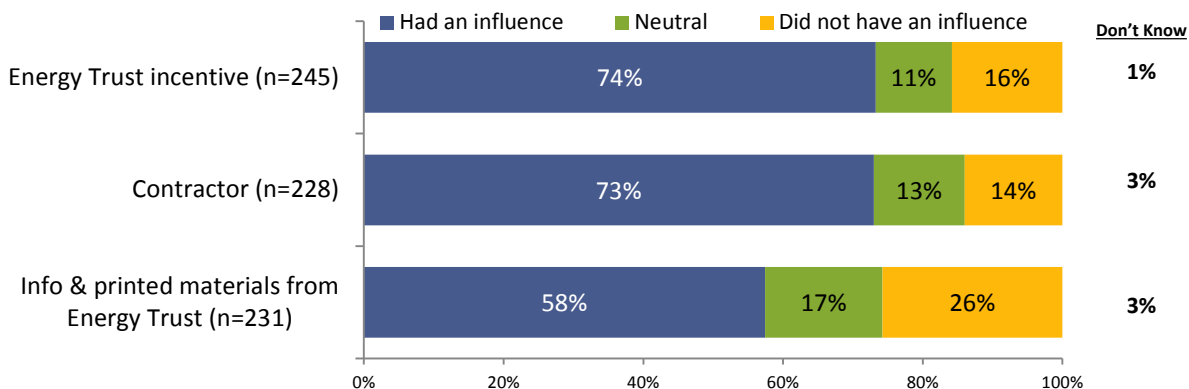
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=232)

Yes	27%
No	69%
Don't know	4%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

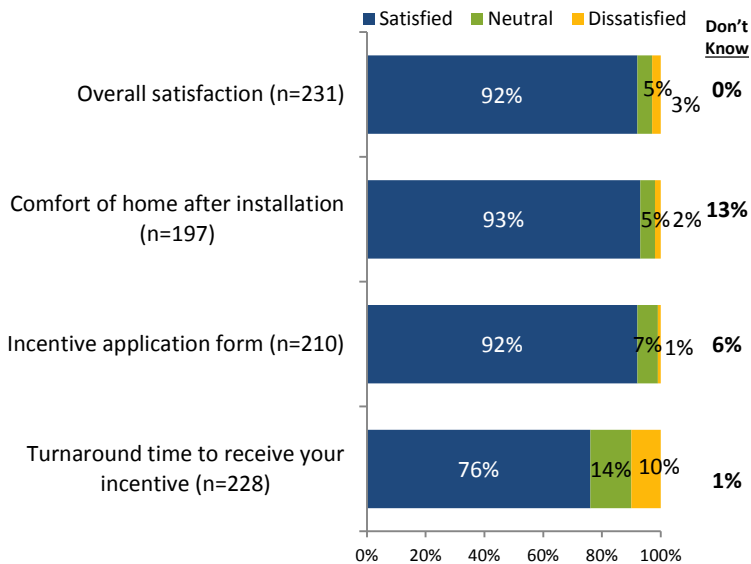
- How influential were the following elements on your decision to have services or work performed?

Floor Insulation

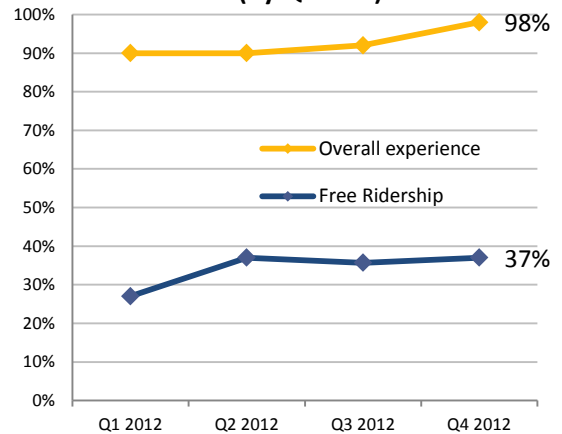
- 92% of respondents rated their overall satisfaction a 4 or 5 out of 5.
- 44% of respondents visited the website or received a brochure before having insulation installed.
- 51% would have installed insulation without Energy Trust incentives and information; 21% would have postponed installation for at least a year.
- The contractor was most influential in the decision to have floor insulation installed (rated a 4 or 5 by 73% of respondents).
- 93% of respondents were satisfied with their contractor; 35% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



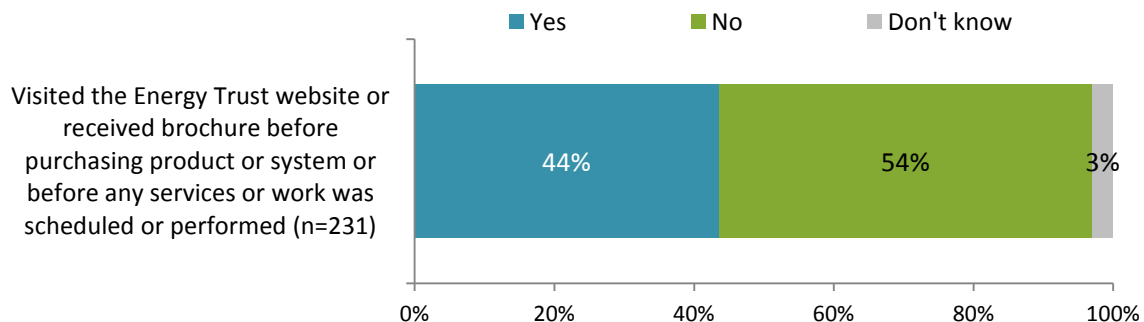
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



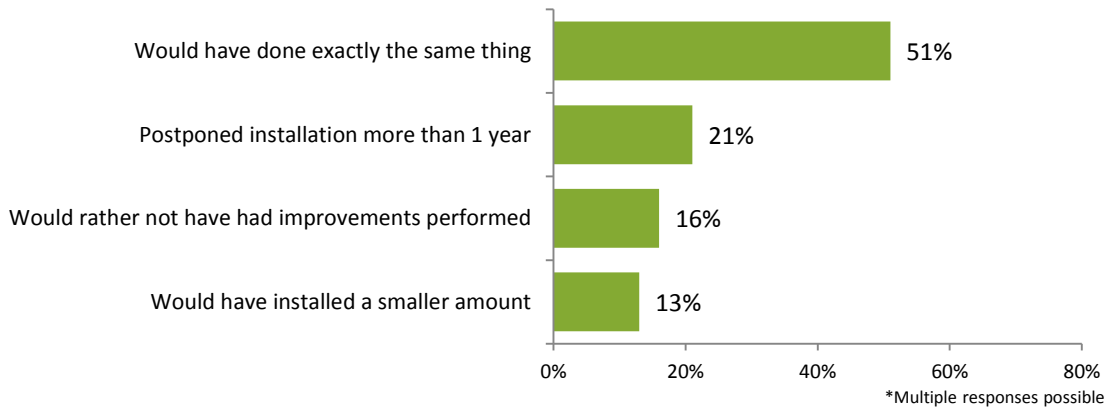
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Floor Insulation

Impact of Incentives

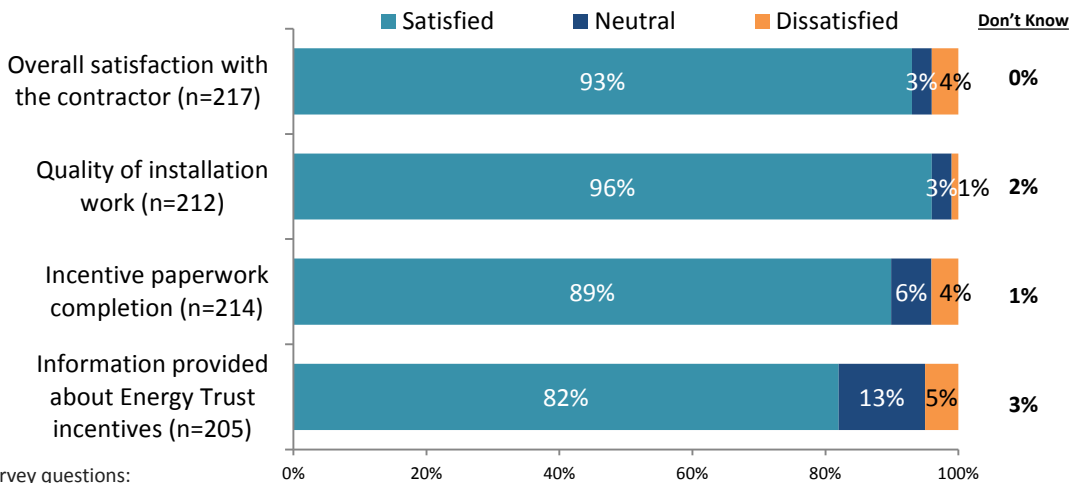
Actions Would Have Taken Without Incentive or Information (n=231)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



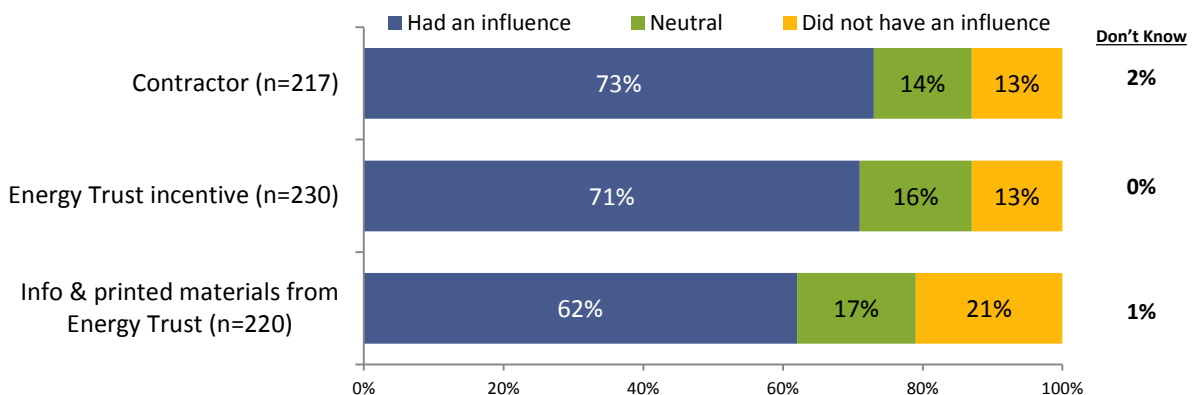
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=218)

Yes	35%
No	61%
Don't know	4%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

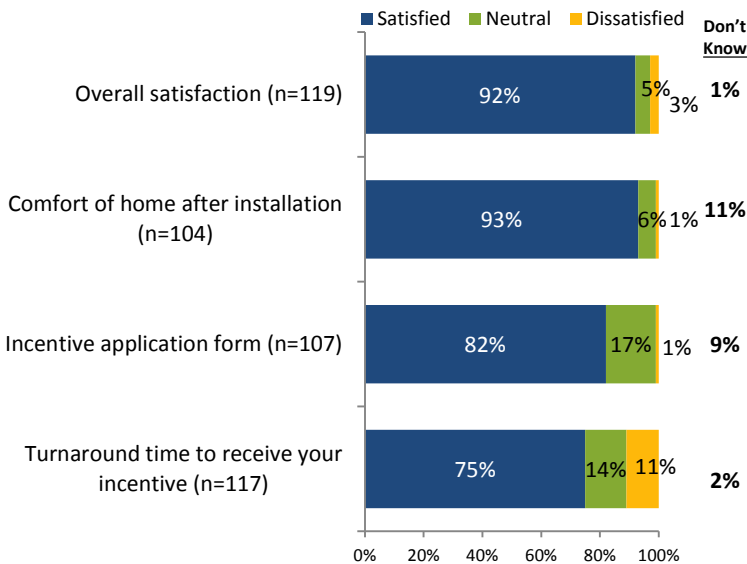
- How influential were the following elements on your decision to purchase your product or system or have services or work performed?

Wall Insulation

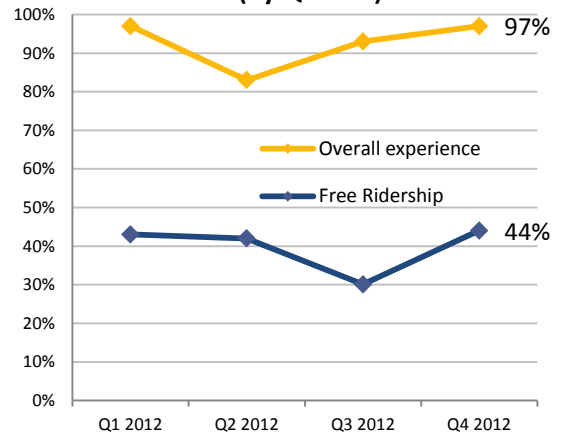
- 92% of respondents rated their overall satisfaction a 4 or 5 out of 5. Satisfaction with the comfort of the home was 93% among those who could give a rating.
- About half of respondents visited our website or received a brochure before having insulation installed.
- 54% reported that they would have installed insulation without the incentive and information.
- The contractor was most influential in the decision to have wall insulation installed (67% rating a 4 or 5).
- 90% of respondents were satisfied with their contractor; 28% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



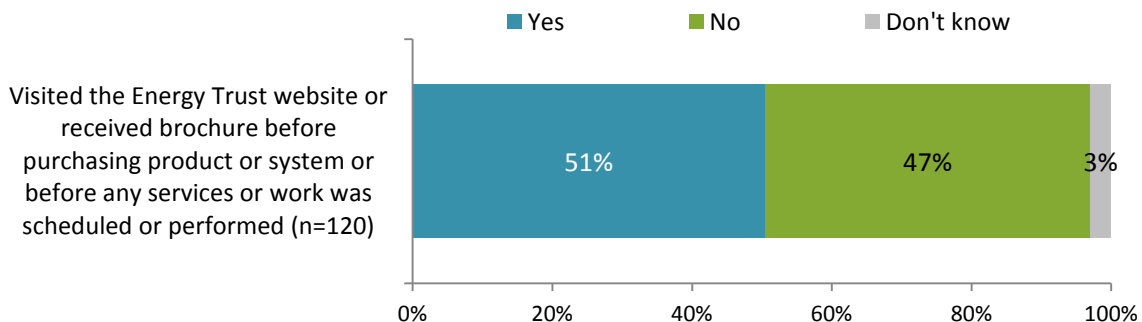
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



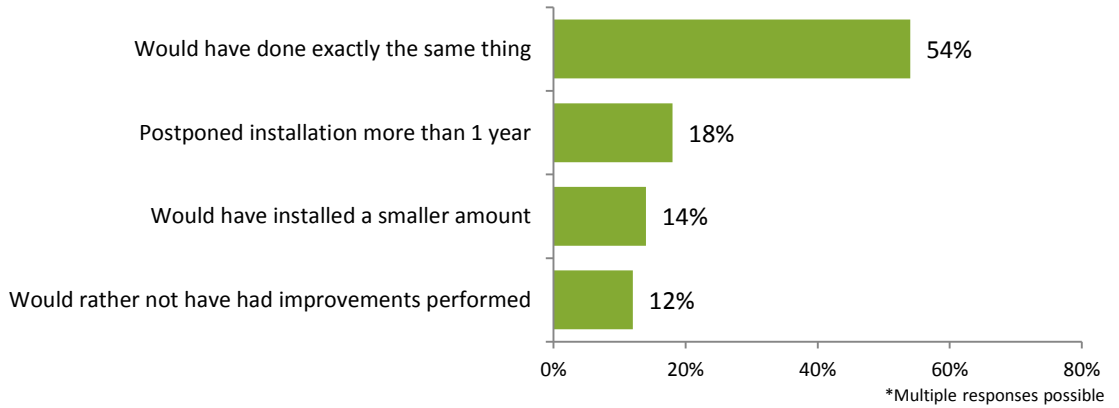
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Wall Insulation

Impact of Incentives

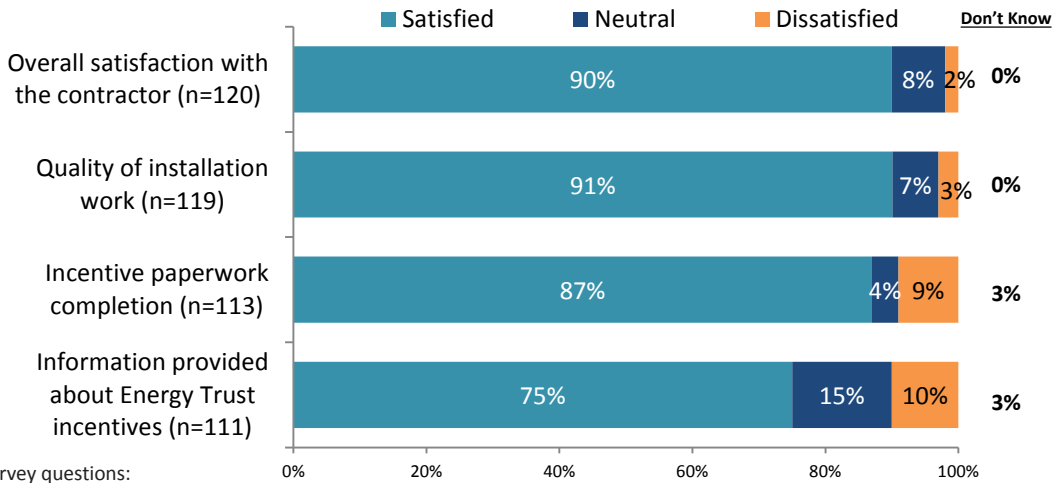
Actions Would Have Taken Without Incentive or Information (n=120)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



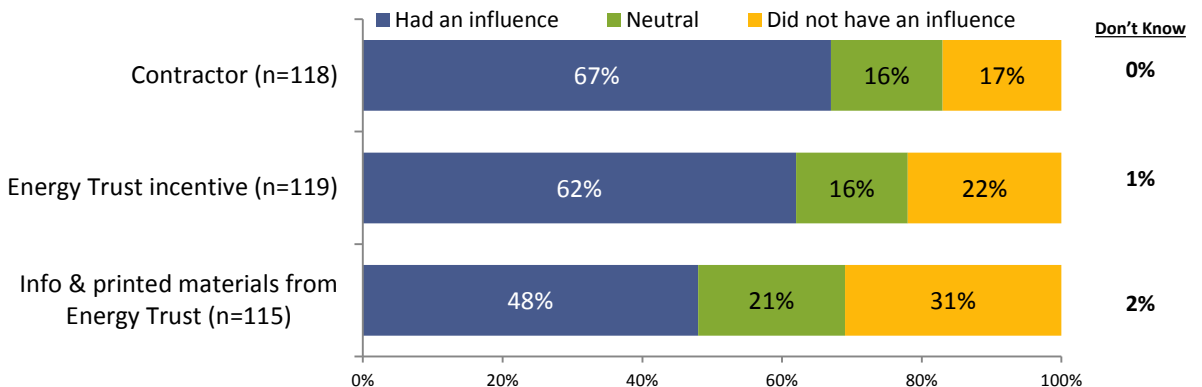
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=120)

Yes	28%
No	70%
Don't know	3%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

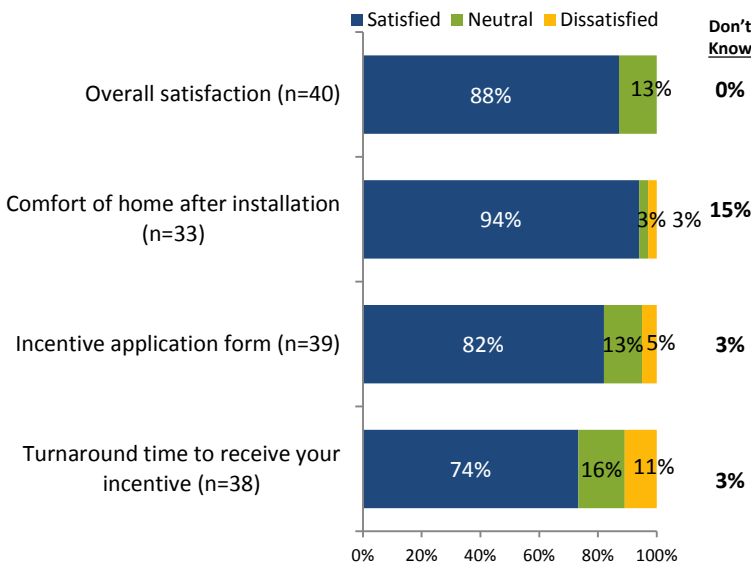
- How influential were the following elements on your decision to have services or work performed?

Duct Insulation

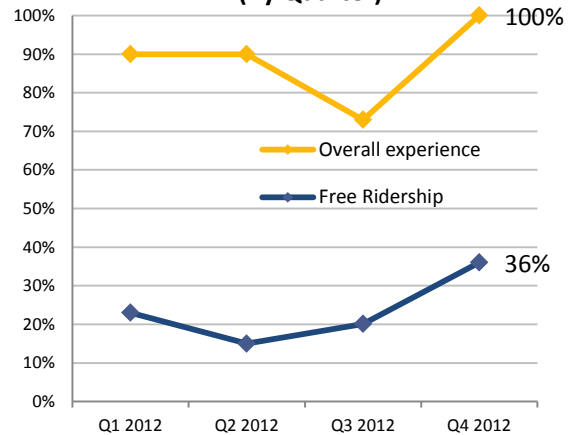
- 88% of respondents rated their overall satisfaction a 4 or 5 out of 5.
- Just under 60% of respondents visited our website or received a brochure before having insulation installed.
- 33% would have installed less duct insulation in the absence of Energy Trust incentives and information, and 15% would not have had the duct insulation installed.
- The incentive was the most influential element (80% rating a 4 or 5 out of 5).
- 90% of respondents were satisfied with their contractor; 53% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



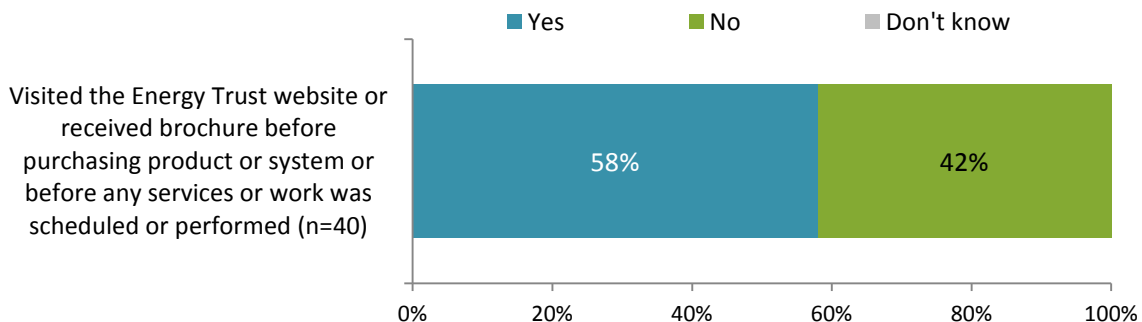
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



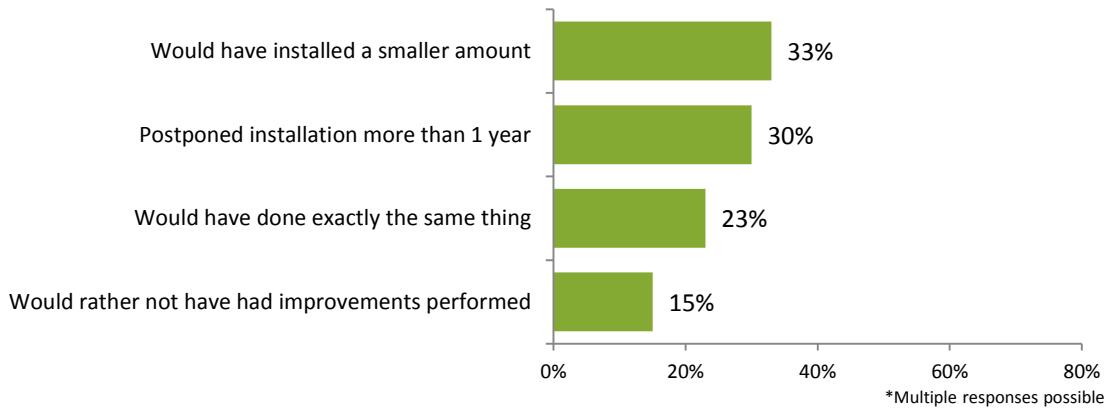
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Duct Insulation

Impact of Incentives

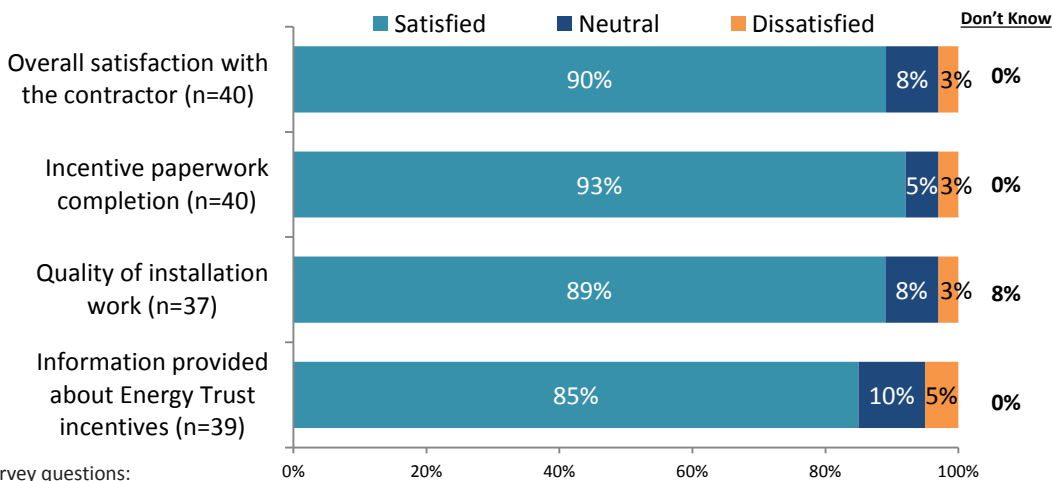
Actions Would Have Taken Without Incentive or Information (n=40)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



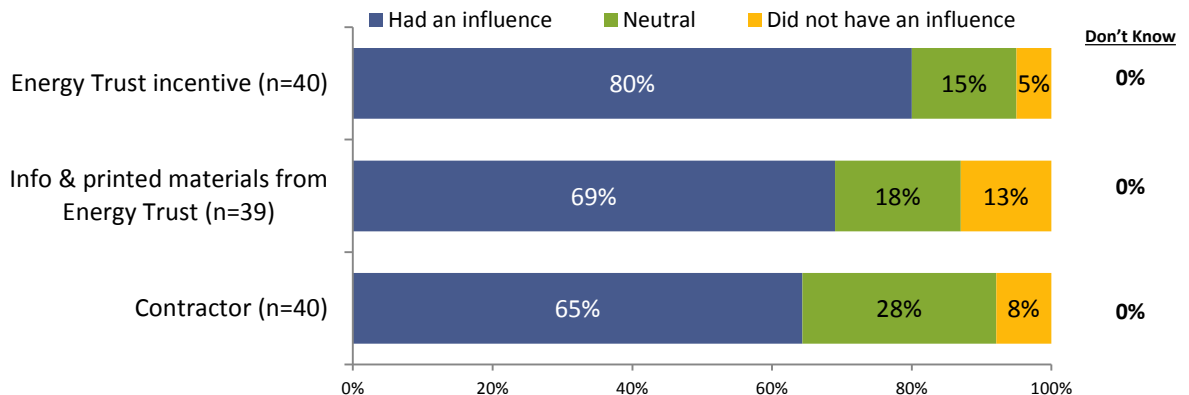
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=40)

Yes	53%
No	43%
Don't know	5%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

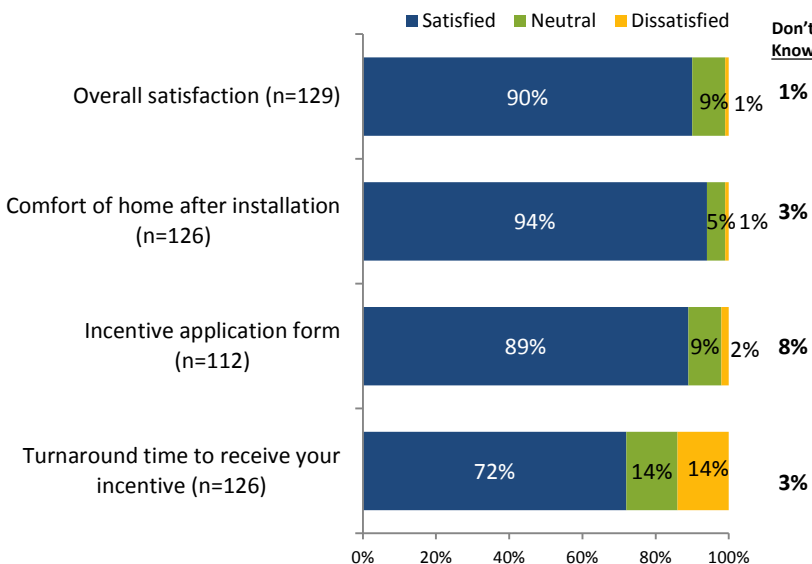
- How influential were the following elements on your decision to have services or work performed?

Duct Sealing

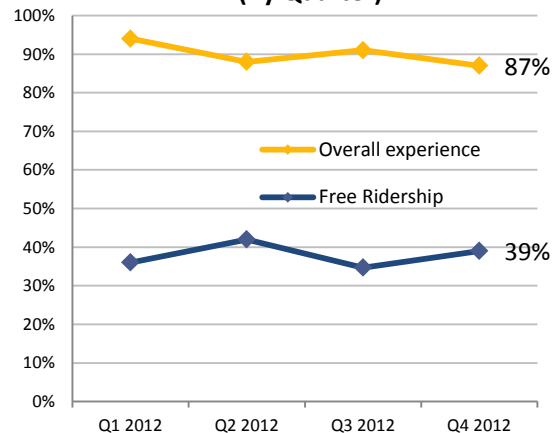
- 90% of respondents who gave a rating rated their overall satisfaction a 4 or 5 out of 5.
- 30% of respondents visited the website or received a brochure before having their ducts sealed.
- 55% would have had their ducts sealed without Energy Trust information and incentives, while 14% would not have.
- The duct sealing contractor was the most influential factor (86% rating 4 or 5).
- 82% respondents have applied (or will) for the Residential Energy Tax Credit.
- 95% of respondents were satisfied with their contractor; 29% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



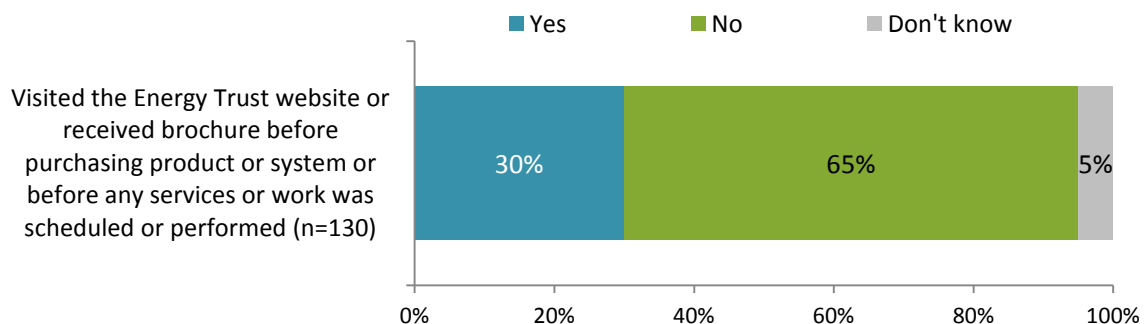
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



Survey question:

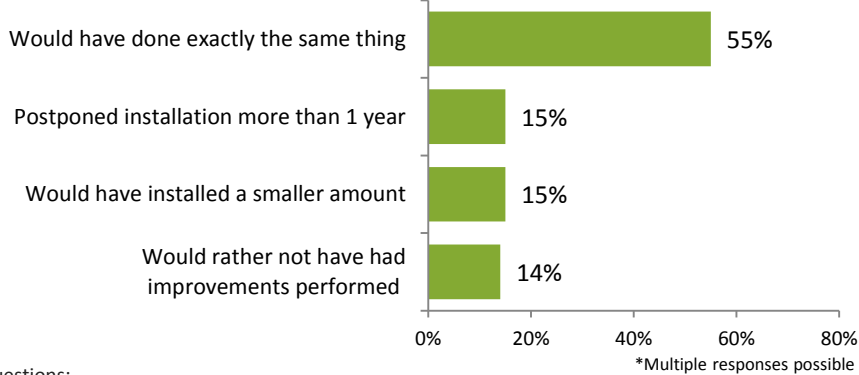
- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Duct Sealing

Impact of Incentives

Actions Would Have Taken Without Incentive or Information

(n=130)*



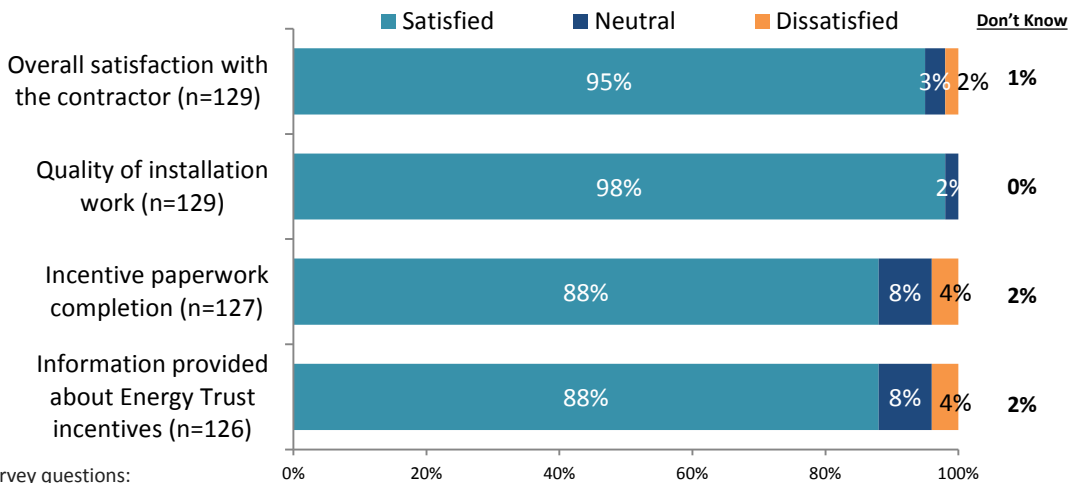
Have you or will you apply for the Oregon State Residential Energy Tax Credit? (n=118)

Yes	82%
No	6%
Don't know	11%

Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- Have you applied or will you apply for the applicable Oregon State Residential Energy Tax Credit?

Satisfaction With Contractor



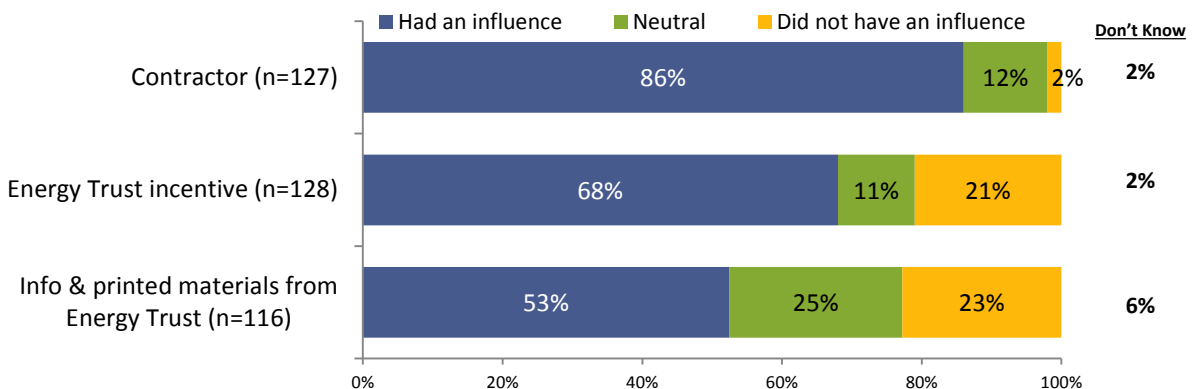
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=130)

Yes	29%
No	69%
Don't know	2%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

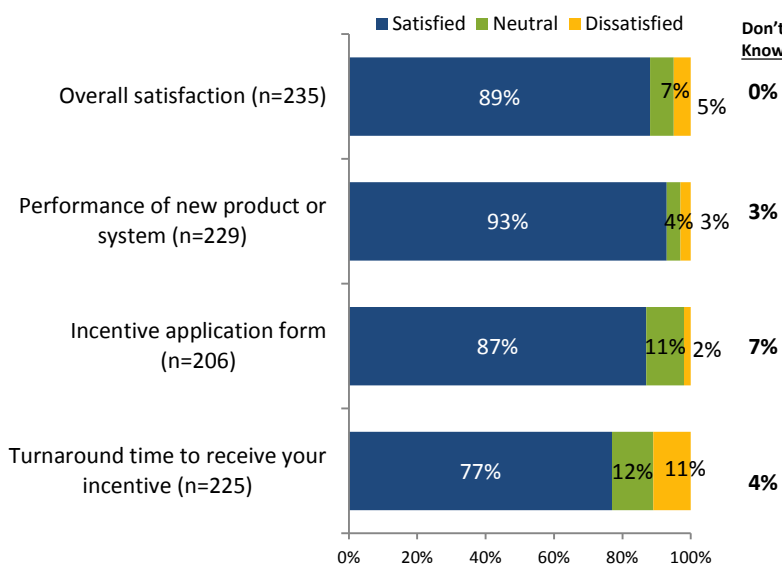
- How influential were the following elements on your decision to have services or work performed?

Heat Pump

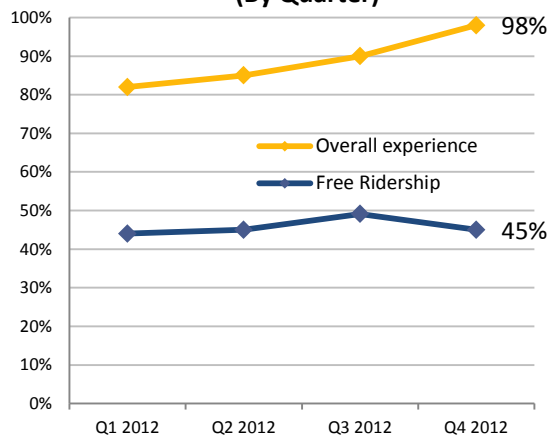
- 89% of respondents rated their overall satisfaction a 4 or 5 out of 5, in line with 2011 results (88%).
- 30% of respondents visited the website or received a brochure before installing their heat pump.
- 70% of respondents would have installed the same heat pump in absence of Energy Trust incentive and information; the contractor had the most influence on the decision to install the heat pump (82% rating 4 or 5 out of 5).
- Most respondents have applied (or will) for the state tax credit (82%).
- 92% of respondents were satisfied with their contractor; 23% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



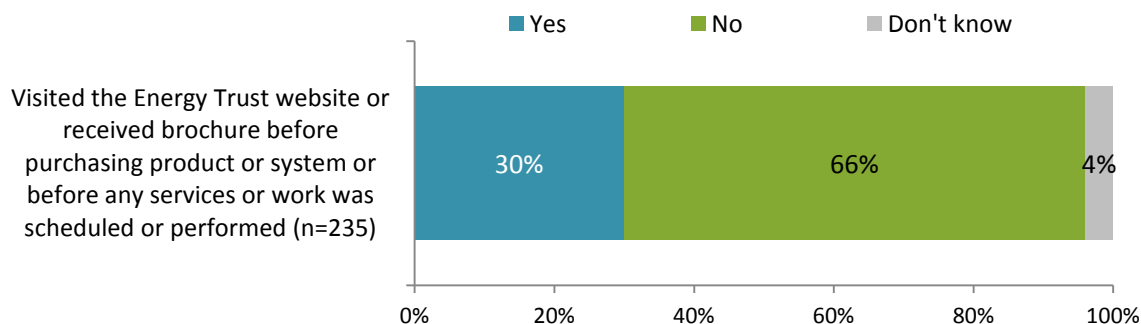
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



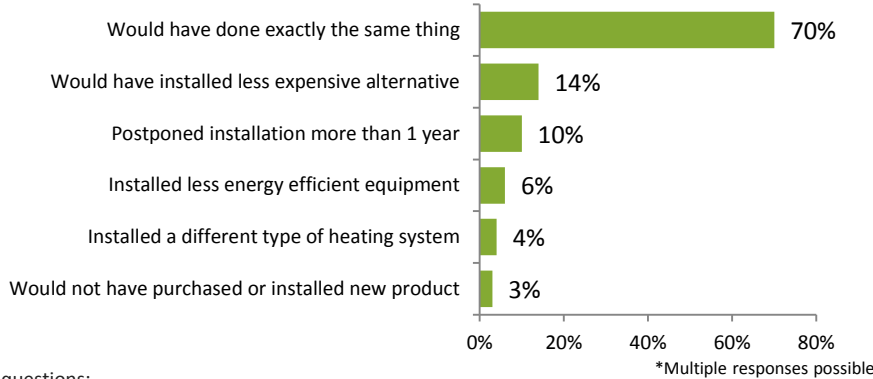
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Heat Pump

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=235)*



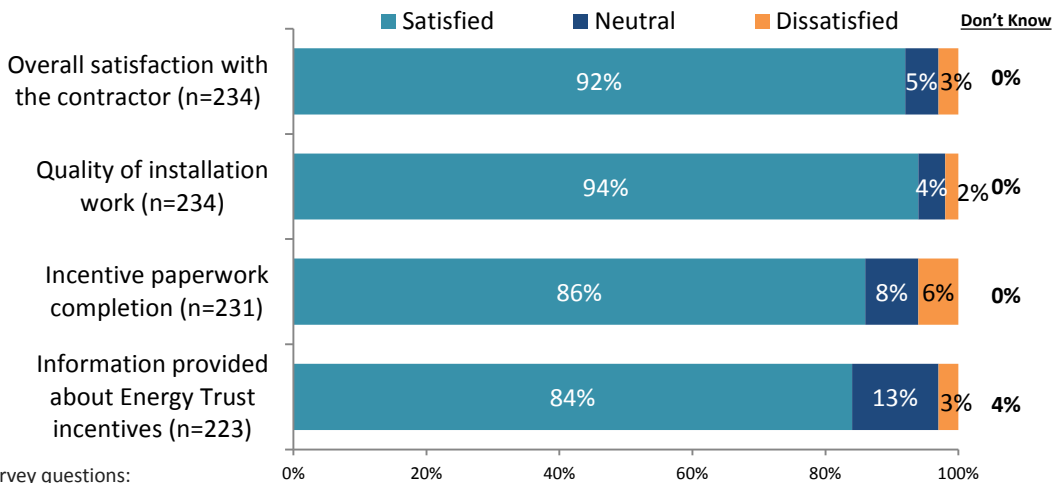
Have you or will you apply for the Oregon State Residential Energy Tax Credit? (n=235)

Yes	82%
No	6%
Don't know	11%

Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- Have you applied or will you apply for the applicable Oregon State Residential Energy Tax Credit?

Satisfaction With Contractor



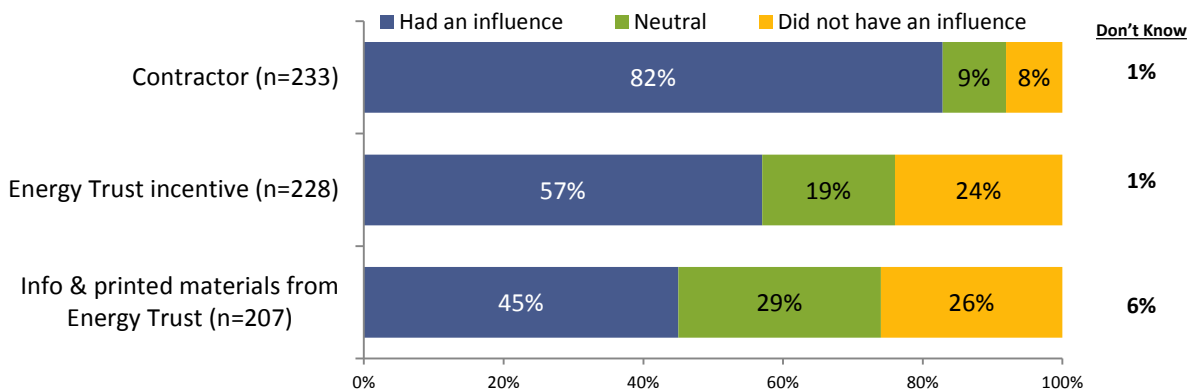
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=235)

Yes	23%
No	72%
Don't know	5%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

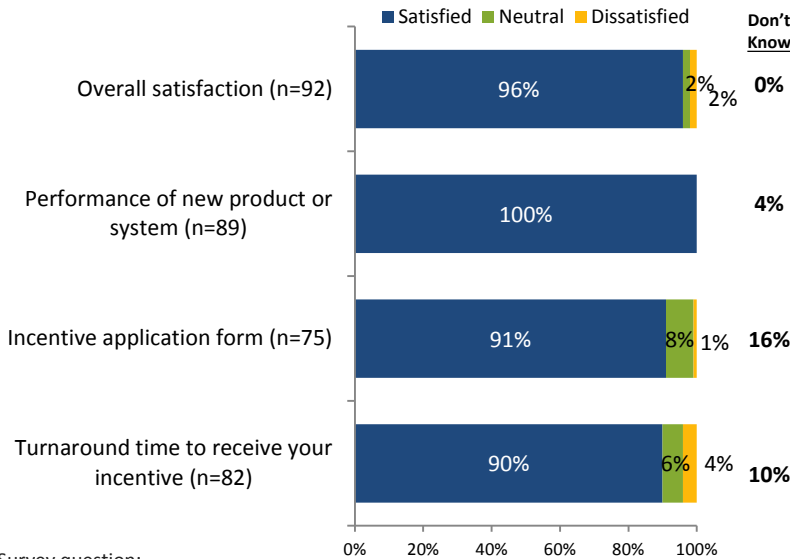
- How influential were the following elements on your decision to have services or work performed?

Water Heaters

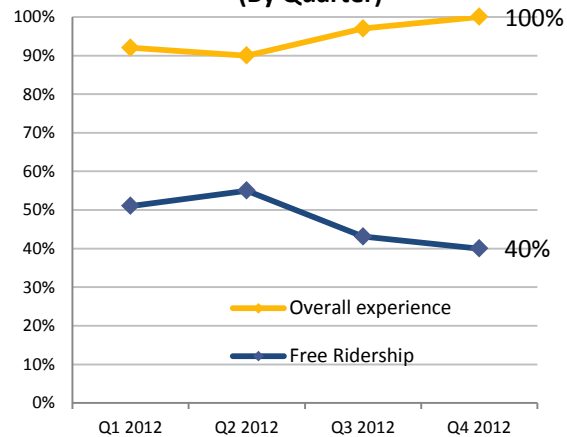
- 96% of respondents rated their overall satisfaction a 4 or 5 out of 5.
- 37% of respondents utilized the website or a brochure.
- 55% of respondents said that they would have bought the same water heater without Energy Trust incentives; however, the influence of the incentive was rated a 4 or 5 out of 5 by 74% of the respondents.
- 65% of respondents have applied (or will) for the state tax credit.
- 96% of respondents were satisfied with their contractor; 31% consulted the approved trade ally list when choosing their contractor. 97% of respondents were satisfied with the quality of installation work performed by their contractor.

Participant Satisfaction

Satisfaction with Program Elements



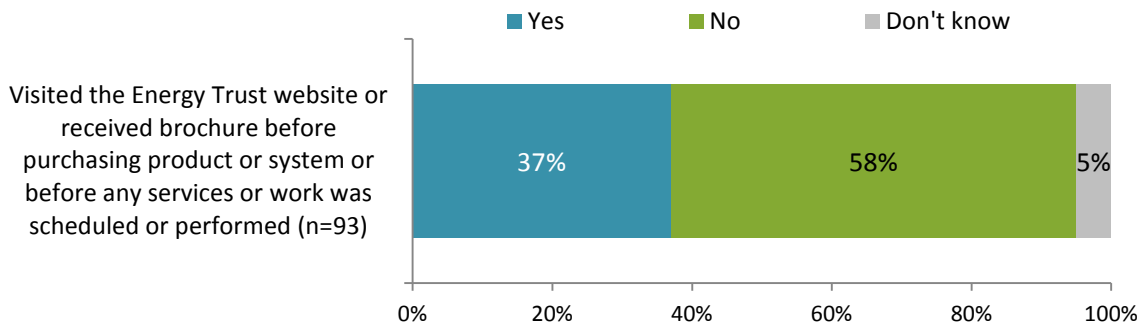
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



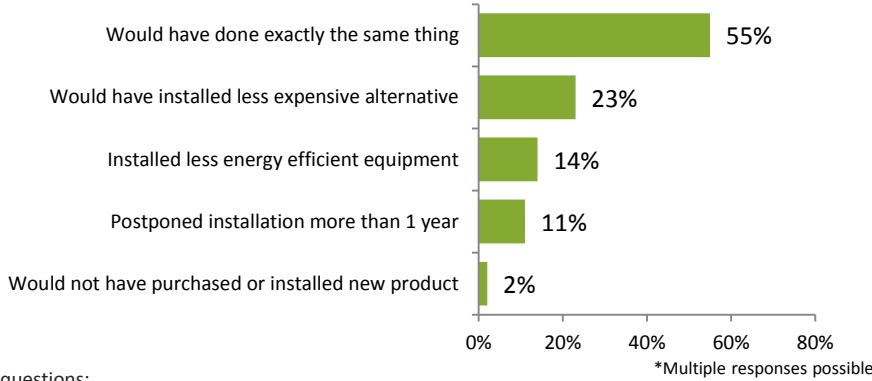
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Water Heaters

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=93)*



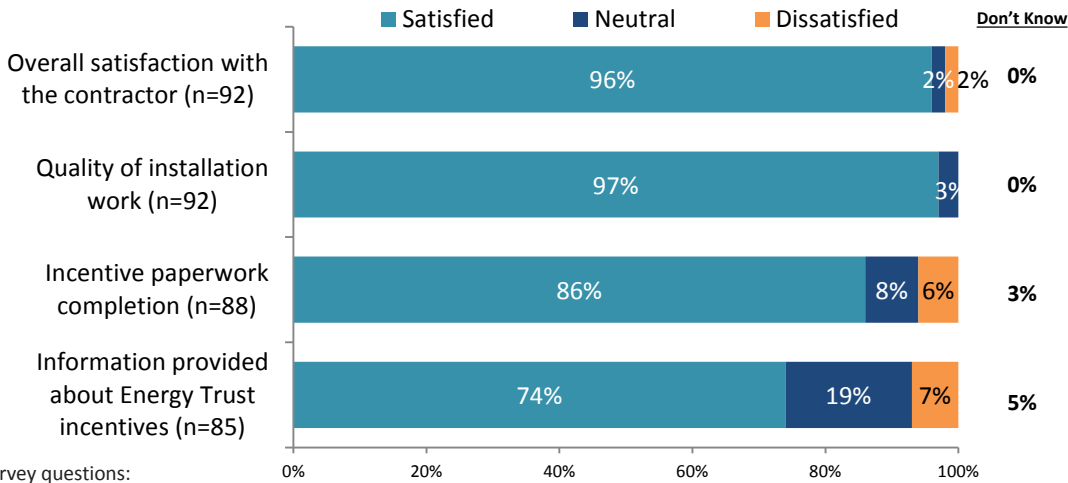
Have you or will you apply for the Oregon State Residential Energy Tax Credit? (n=86)

Yes	65%
No	21%
Don't know	14%

Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- Have you applied or will you apply for the applicable Oregon State Residential Energy Tax Credit?

Satisfaction With Contractor



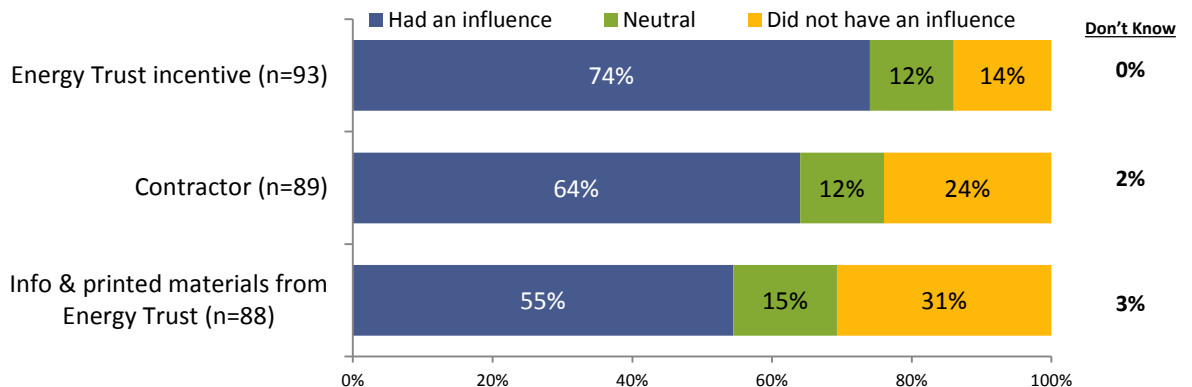
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=93)

Yes	31%
No	62%
Don't know	7%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

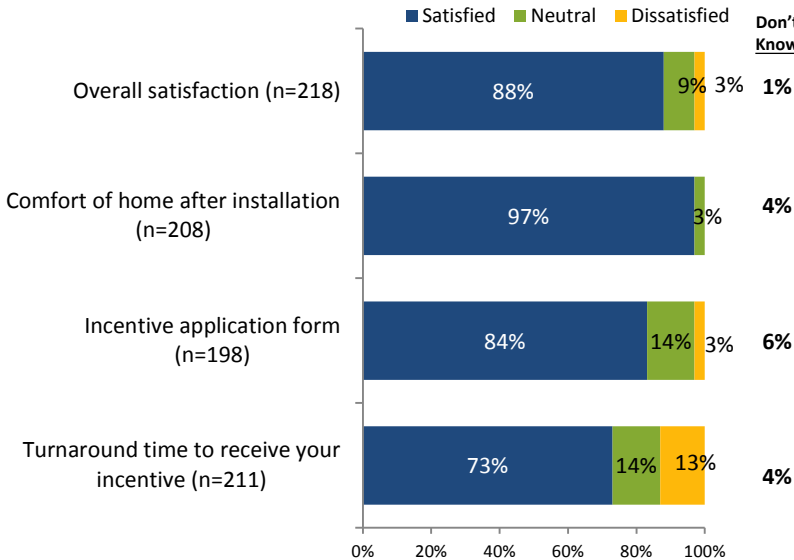
- How influential were the following elements on your decision to have services or work performed?

Windows

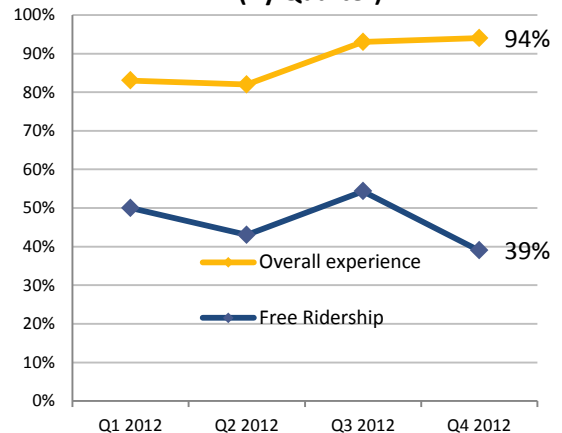
- 88% of respondents rated their overall satisfaction a 4 or 5 out of 5, in line with 2011 results (85%). Respondents were least satisfied with the turnaround time for the incentive (73%), but were very satisfied with comfort (97%).
- 39% of respondents visited the website or received a brochure before having their windows installed.
- 73% of respondents indicated that in the absence of Energy Trust incentives, they would have installed the same windows.
- The contractor was the most influential factor (72% rating 4 or 5).
- 90% of respondents were satisfied with their contractor; only 22% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



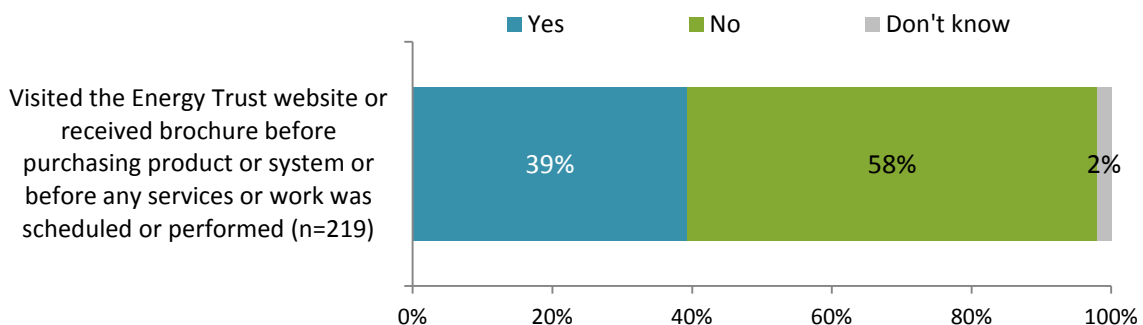
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project

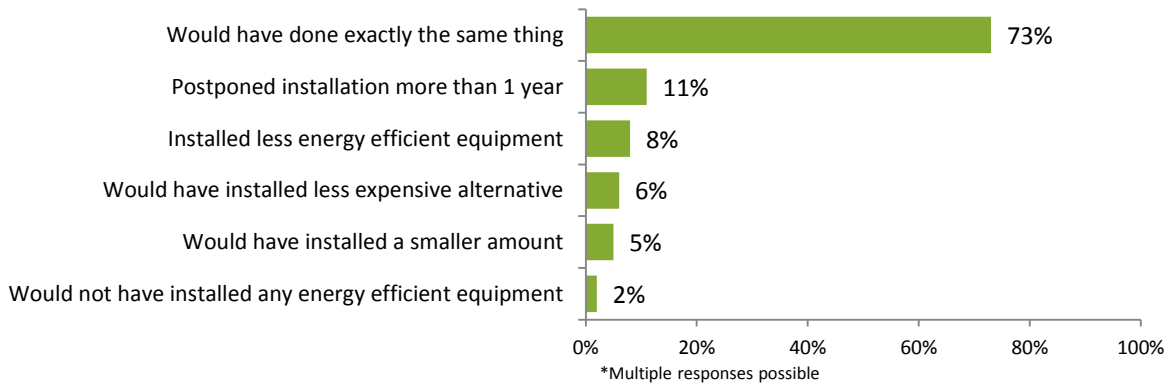


Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Impact of Incentives

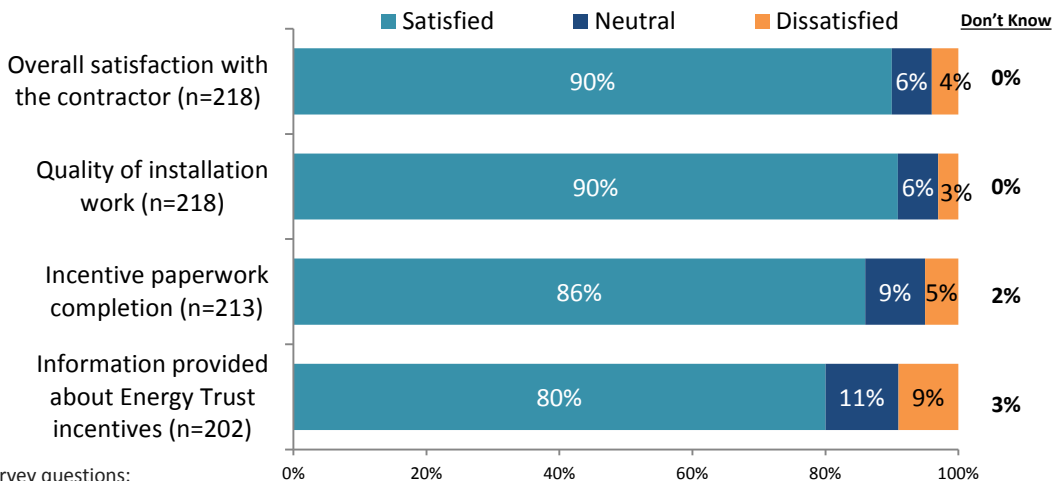
Actions Would Have Taken Without Incentive or Information (n=219)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



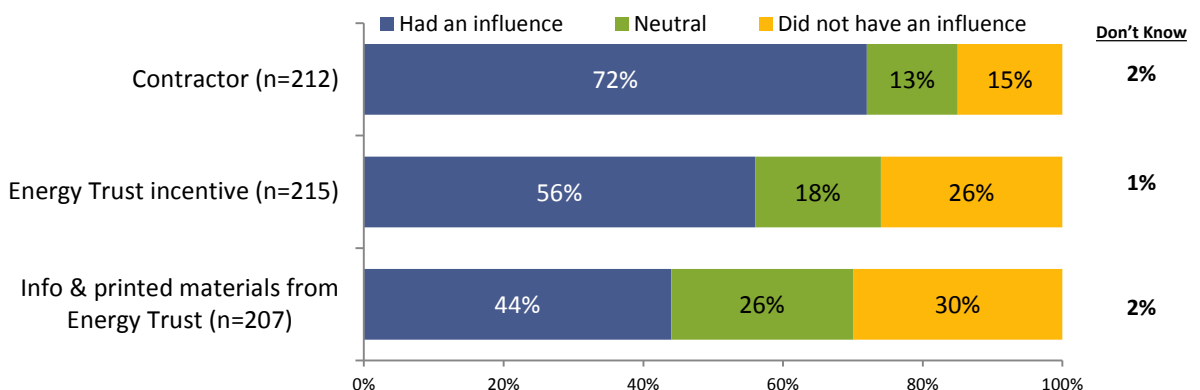
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=219)

Yes	22%
No	77%
Don't know	1%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

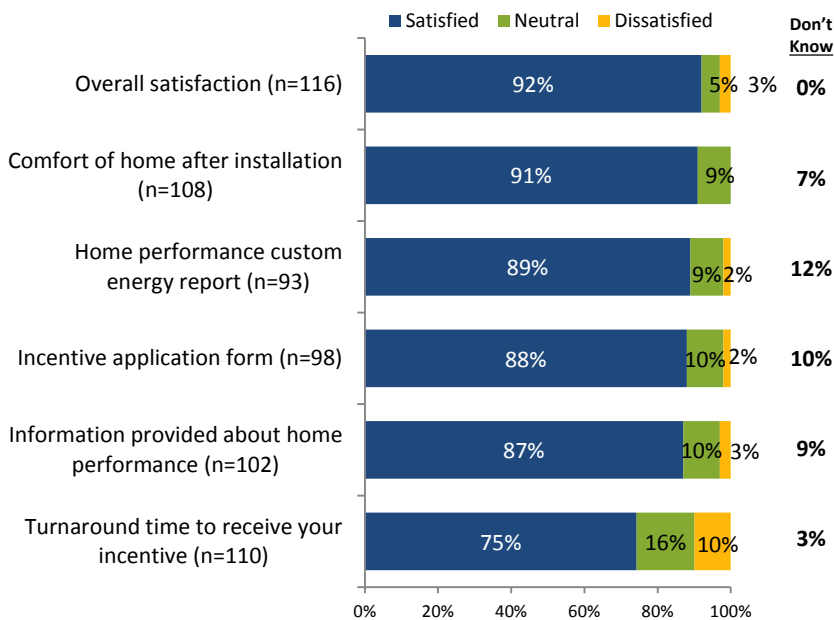
- How influential were the following elements on your decision to have services or work performed?

Home Performance

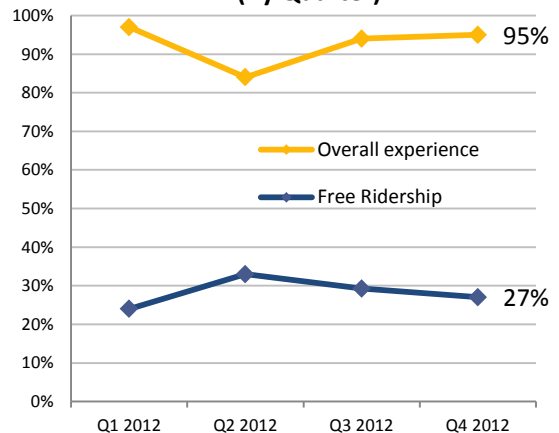
- 92% of respondents rated their overall satisfaction a 4 or 5 out of 5, in line with 2011 results (90%).
- 28% of respondents said they would have done the same project in absence of the program.
- The contractor had just slightly more influence than the incentive (82% vs. 75%).
- 76% of respondents have applied (or will) for the state tax credit.
- 90% of respondents were satisfied with their contractor; 54% consulted the approved trade ally list when choosing their contractor.

Participant Satisfaction

Satisfaction with Program Elements



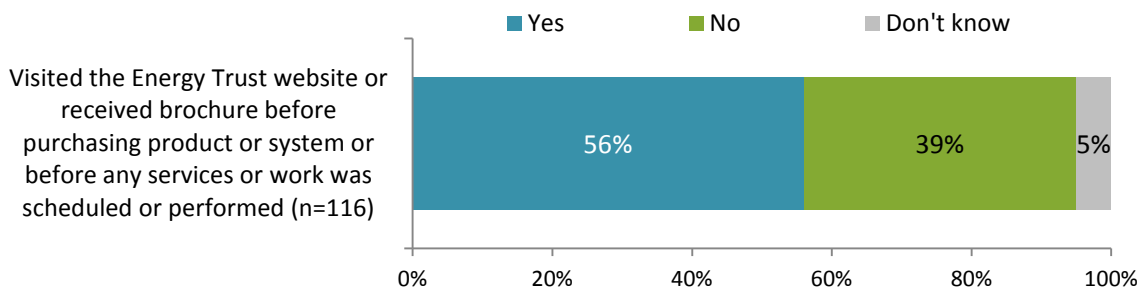
Satisfaction and Free Ridership Over Time (By Quarter)



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



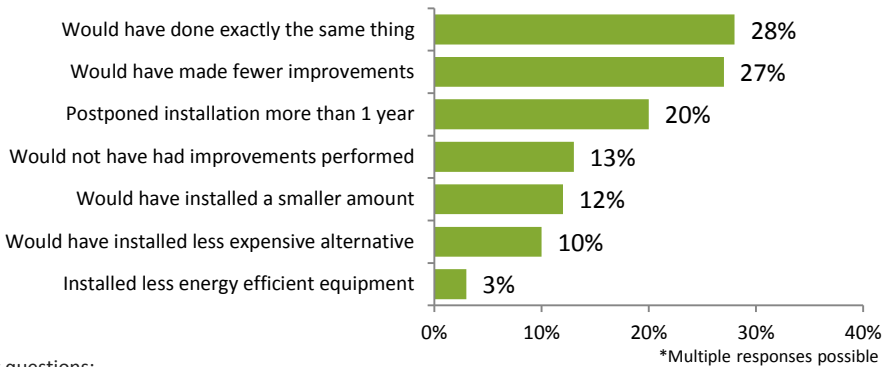
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Home Performance

Impact of Incentives

Actions Would Have Taken Without Incentive or Information (n=116)*



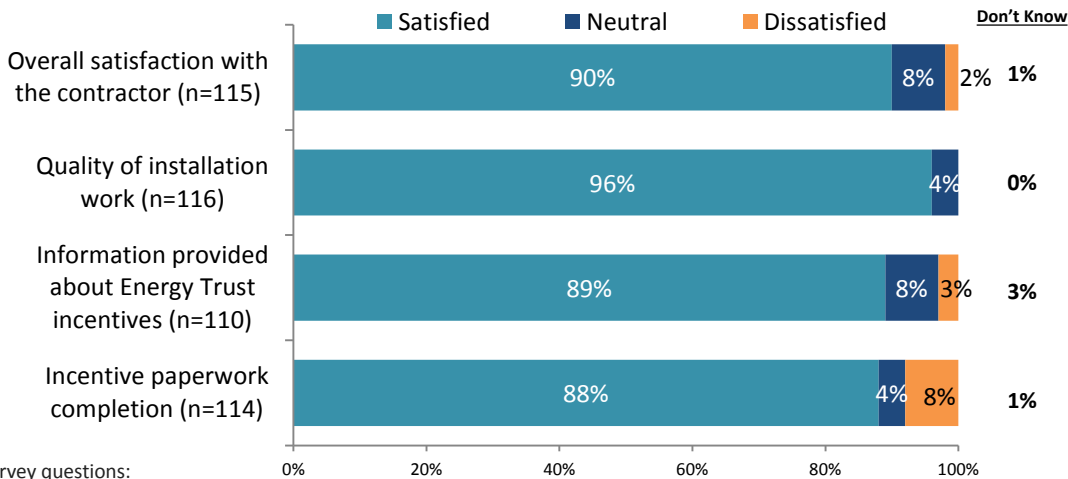
Have you or will you apply for the Oregon State Residential Energy Tax Credit? (n=111)

Yes	76%
No	5%
Don't know	18%

Survey questions:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?
- Have you applied or will you apply for the applicable Oregon State Residential Energy Tax Credit?

Satisfaction With Contractor



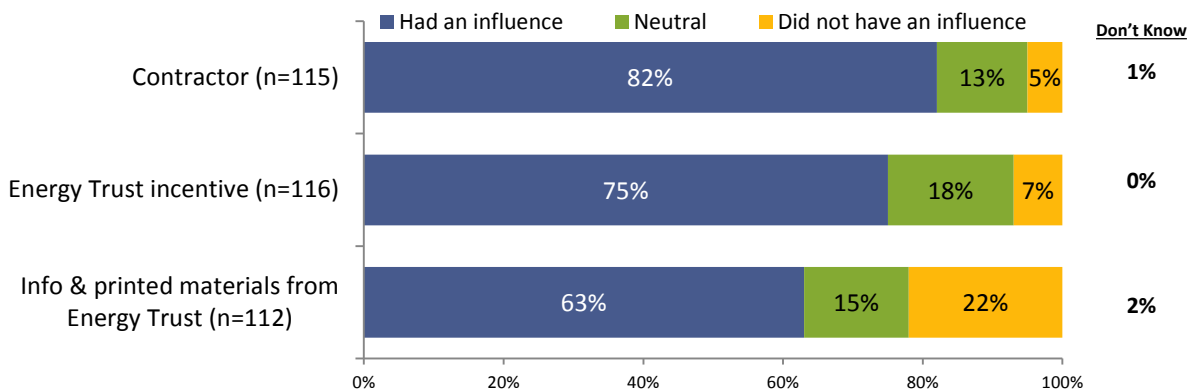
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=116)

Yes	54%
No	42%
Don't know	3%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision to Have Services or Work Performed



Survey question:

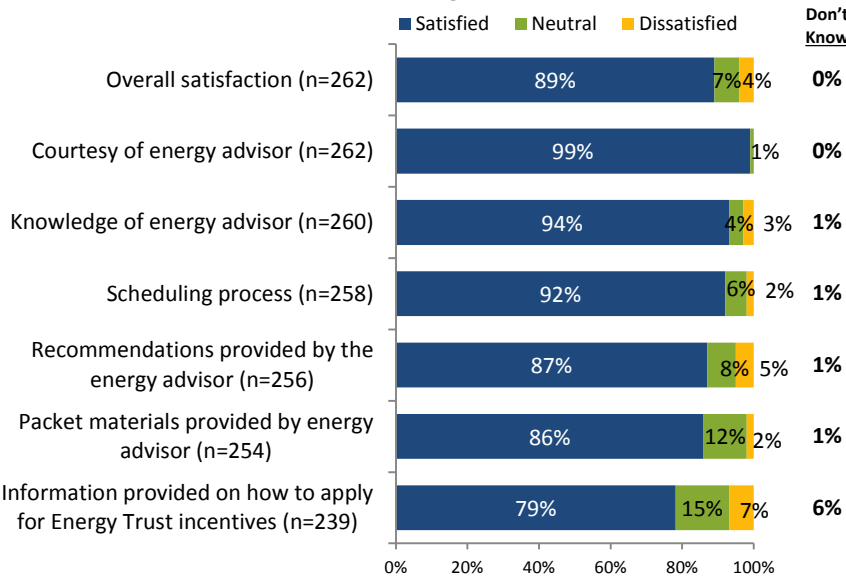
- How influential were the following elements on your decision to have services or work performed?

Home Energy Review

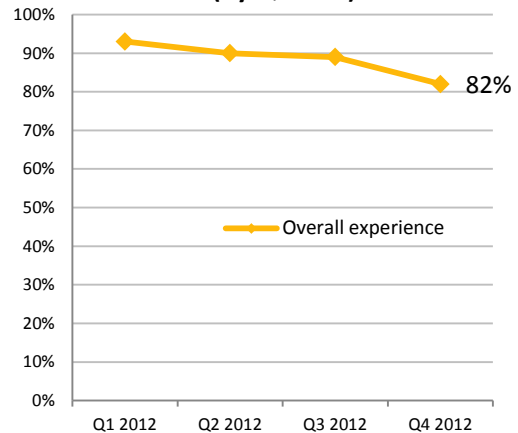
- The vast majority of respondents received an in-home HER; we were able to reach only three phone HER respondents.
- 89% of respondents rated their overall satisfaction a 4 or 5 out of 5, in line with 2011 results (91%).
- Self-reported follow-through was 44% of respondents for all actions; this figure has been very stable over time. The most common actions already taken were installing more CFLs and insulation. 68% said they were planning to follow through in the next 12 months.

Participant Satisfaction

Satisfaction with Program Elements



Satisfaction Over Time (By Quarter)



Survey question:

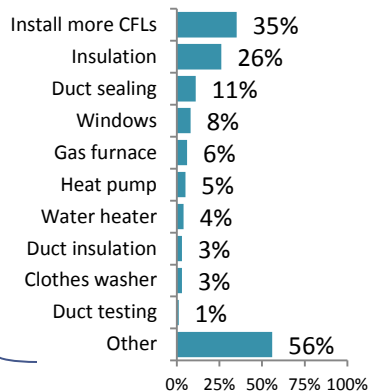
- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Follow Through on Recommendations from Advisor

Have you made any improvements based on recommendations from the advisor? (n=263)

Yes	44%
No	55%
Don't know	1%

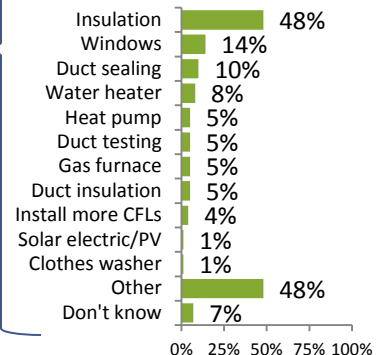
What did you do? (n=113)*



Are you planning to make any improvements in the next 12 months? (n=263)

Yes	68%
No	25%
Don't know	7%

What do you plan to do? (n=178)*



Survey questions:

- Since your Home Energy Review, have you made any of the improvements recommended by the advisor?
- What did you do?
- Are you planning to take any of the recommended actions in the next 12 months?
- What do you plan to do?

*Multiple responses possible

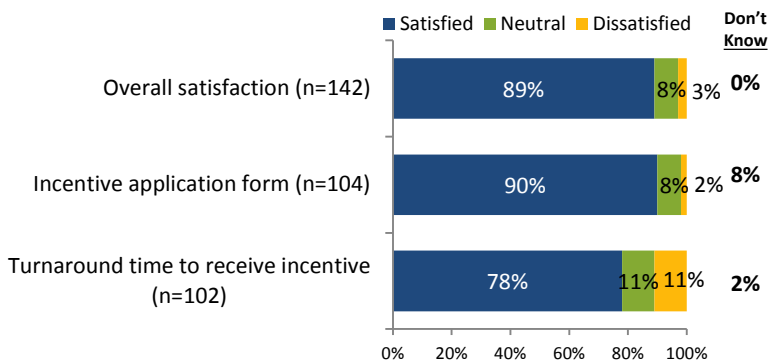
Existing Homes – Washington

- 89% of respondents rated their overall satisfaction a 4 or 5 out of 5.
- Of the 104 respondents who installed measures, 66% said they would have made the same improvements without Energy Trust incentive and information; the contractor was the most influential factor in their decision making.
- Also, for the measure installation participants, 93% were satisfied with their contractor and 27% had consulted the trade ally list when selecting their contractor.
- When asked to rate the importance of various factors in motivating energy efficient improvements, 96% rated cost savings a 4 or 5 out of 5, more than the other factors offered. Increased comfort and convenience as well as improved health and safety for the home were also rated as important by many respondents.

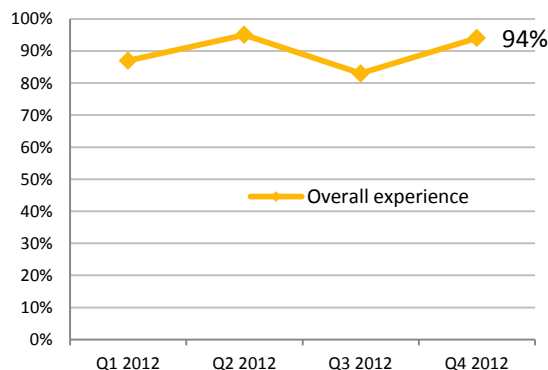
Measure	N
Air sealing	5
Ceiling insulation	9
Duct insulation	1
Gas furnace	41
Duct sealing	12
Floor insulation	1
Wall insulation	1
Water heaters	7
Windows	22
Home Performance with Energy Star	5
Home Energy Reviews	39
Total	143

Participant Satisfaction

Satisfaction with Program Elements



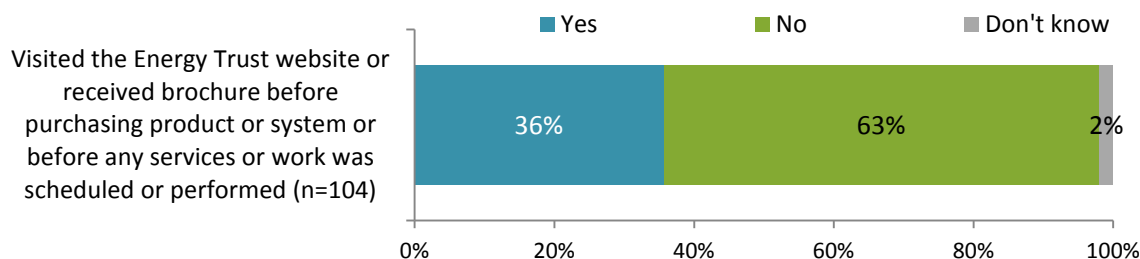
Satisfaction Over Time



Survey question:

- Thinking of your participation with Energy Trust, please rate your satisfaction with each of the following elements on a 5-point scale where 5 is very satisfied and 1 is not at all satisfied.

Interactions With Energy Trust Prior to Project



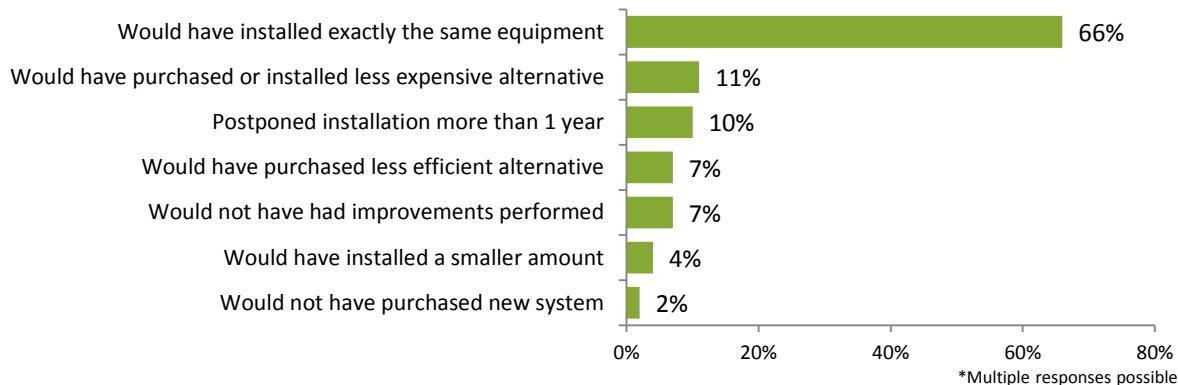
Survey question:

- Did you visit the Energy Trust website or receive one of their brochures before you purchased your product or system or before you had any services or work scheduled and performed?

Existing Homes – Washington

Impact of Incentives

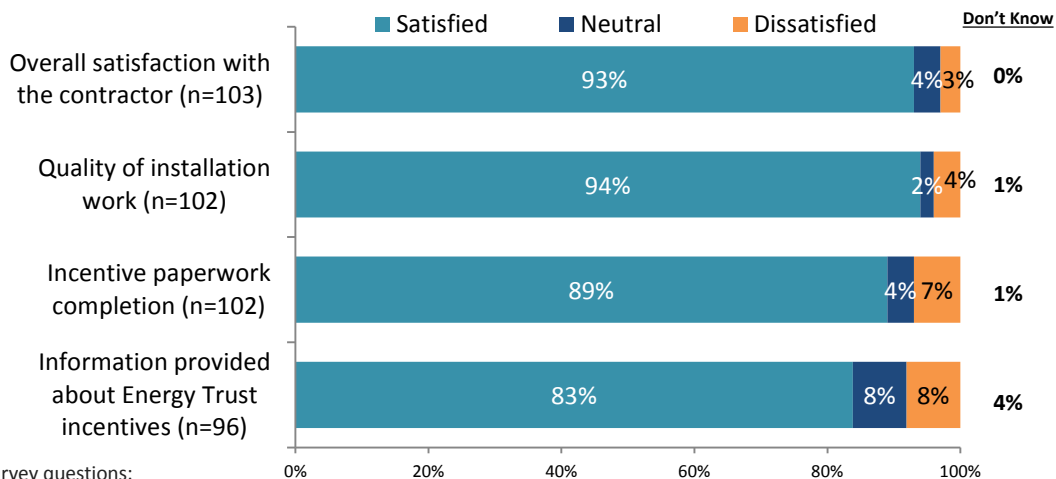
Actions Would Have Taken Without Incentive or Information (n=104)*



Survey question:

- Which of the following statements describe the actions you would have taken had the Energy Trust incentive and information not been available?

Satisfaction With Contractor



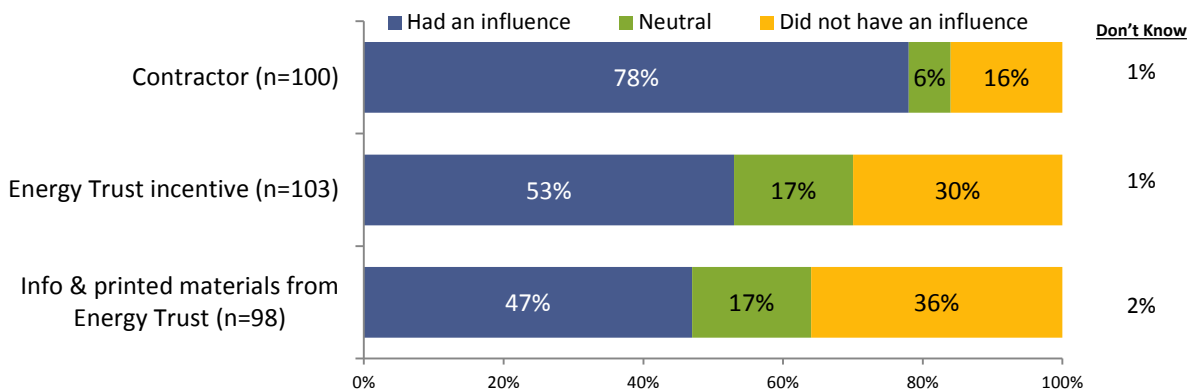
Did you consider Energy Trust's list of approved trade allies when selecting your contractor? (n=103)

Yes	27%
No	71%
Don't know	2%

Survey questions:

- Thinking of your experience with your contractor, please indicate the number that corresponds to your satisfaction with the following service elements, with 1 indicating not at all satisfied and 5 indicating very satisfied.
- Did you consider Energy Trust's list of approved trade allies when selecting your contractor?

Influences on Decision Have Services or Work Performed

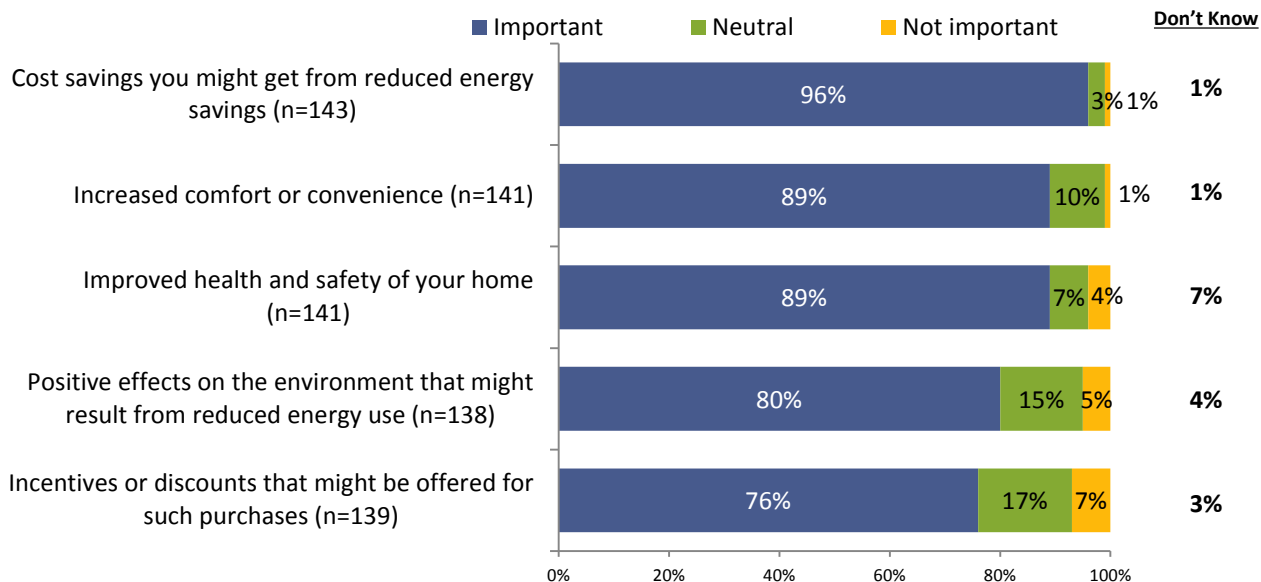


Survey question:

- How influential were the following elements on your decision to have services or work performed?

Existing Homes – Washington

Importance of Factors When Making Energy Efficient Improvements



Survey question:

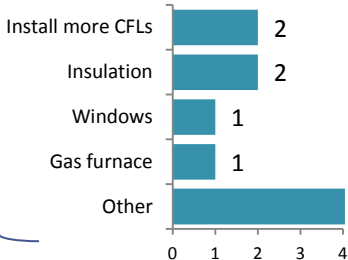
- Please rate the importance of each of the following factors when you plan energy efficient improvements to your home or shop for energy related products or equipment on a 5 point scale, with 1 indicating not at all important and 5 indicating very important.

Follow Through on Recommendations from Advisor

Have you made any improvements based on recommendations from the advisor? (n=39)

Yes	28%
No	72%

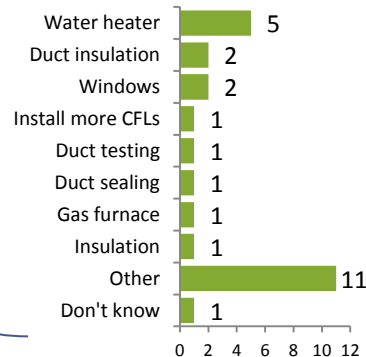
What did you do? (n=12)*



Are you planning to make any improvements in the next 12 months? (n=39)

Yes	51%
No	36%
Don't know	13%

What do you plan to do? (n=20)*



Survey questions:

- Since your Home Energy Review, have you made any of the improvements recommended by the advisor?
- What did you do?
- Are you planning to take any of the recommended actions in the next 12 months?
- What do you plan to do?

*Multiple responses possible

Other Renewables

- We were unable to survey any small wind participants in 2012.

Appendix – Free Ridership Calculations

Calculation Method:

The method used here is described in more detail in the memo “Energy Trust Free Ridership Methodology” by Phil Degens and Sarah Castor, dated June 4, 2008.

For simplicity, a project’s free ridership score is composed of two elements: a project change score and an influence score. The project change score is based on the respondent’s answer to the question “Which of the following statements describe the actions you would have taken if Energy Trust incentives and information were not available?” Possible answer choices are assigned a number between 0 and 0.5, with 0 indicating no free ridership and 0.5 indicated the project was a full free rider. Since respondents can select multiple responses to the question, their answer choice with the lowest score is selected. If the respondent selects “Don’t know”, two scores are created to account for the range of possible answers (0 and 0.5). For commercial projects, a follow-up question is asked of respondents who answered that they would not have done anything differently in absence of the program: “If your firm had not received the incentive, would it have made available the funds needed to cover the entire cost of the project?” If the respondent selects “Yes” their project change score is 0.5, if they select “No” it is 0, and if they select “Don’t know” they are given two scores for project change, as described above.

The influence score is based on their answers to the question about the influence of Energy Trust incentives, program representatives, contractor/salesperson, studies and other program elements. The answer choices are given a value between 0 (element’s influence was a 5, extremely influential) and 0.5 (element’s influence was a 1, not at all influential). The score for the most influential element is taken as the influence score. If a respondent answers “Don’t know” for all elements, they are given two influence scores to account for the range of possible answers (0 and 0.5).

The project change and influence scores are added to generate the free ridership score for each project. For respondents not providing any “Don’t know” answers this will be one number between 0 (no free ridership) and 1 (full free ridership). For those who gave a “Don’t know” answer to one of the questions, there are two free ridership scores, one high and one low. For those who answered “Don’t know” to both the project change and influence questions, no score is calculated.

Free ridership scores are averaged for all respondents of each program/measure group and shown as a percent, rather than a decimal. “Low Scenario” is the average of the free ridership scores where the low score is used for those who answered “Don’t know” to a question; “High Scenario” is the average where the high score is used for those who answered “Don’t know” to a question. “Mid Scenario” is the average of the Low and High Scenarios. In the case of commercial and industrial projects, individual scores are weighted by their share in the electric or gas savings of all respondents of their group before averaging for scenarios.

Scenarios

Commercial Sector

Free Ridership (savings-weighted)	Electric			Gas		
	Low Scenario	Mid Scenario	High Scenario	Low Scenario	Mid Scenario	High Scenario
Existing Buildings (n=172, 63)	14%	16%	18%	16%	18%	20%
Existing Multifamily (n=75, 13)	14%	17%	19%	35%	37%	39%
New Buildings and Multifamily†	--	--	--	--	--	--

† Free ridership is not calculated through Fast Feedback.

Industrial Sector

Free Ridership (savings-weighted)	Electric			Gas		
	Low Scenario	Mid Scenario	High Scenario	Low Scenario	Mid Scenario	High Scenario
Production Efficiency (n=183, 10)	11%	16%	20%	20%	26%	31%

Home Products

Free Ridership	Low Scenario	Mid Scenario	High Scenario
Clothes Washers (n=278)	46%	51%	56%
Refrigerators (n=126)	48%	52%	56%
Refrigerator Recycling (n=278)	25%	32%	39%

Existing Homes

Free Ridership	Low Scenario	Mid Scenario	High Scenario
Air Sealing (n=162)	20%	21%	21%
Ceiling Insulation (n=240)	33%	34%	34%
Floor Insulation (n=230)	34%	34%	35%
Wall Insulation (n=119)	39%	40%	41%
Duct Insulation (n=39)	23%	23%	23%
Duct Sealing (n=118)	38%	38%	38%
Heat Pump (n=235)	43%	46%	49%
Water Heaters (n=86) ^a	41%	46%	51%
Windows (n=197)	46%	47%	48%
Home Performance (n=111)	26%	28%	31%

^a 0.67 residential gas water heaters are market of a market transformation effort; free ridership is shown for information only and will not be the basis for programmatic decisions about the measure.