

Q1 2025: Tuesday, February 11

9:00am – 12:00pm Pacific

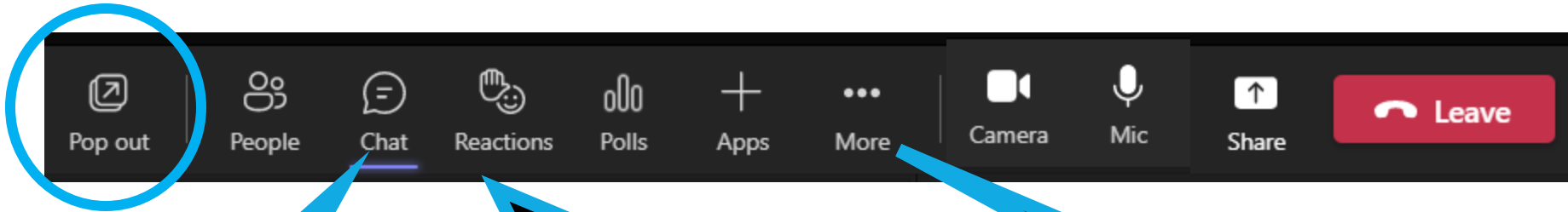
Virtual

Regional Portfolio Advisory Committee





Tools for Today: Engaging on Teams

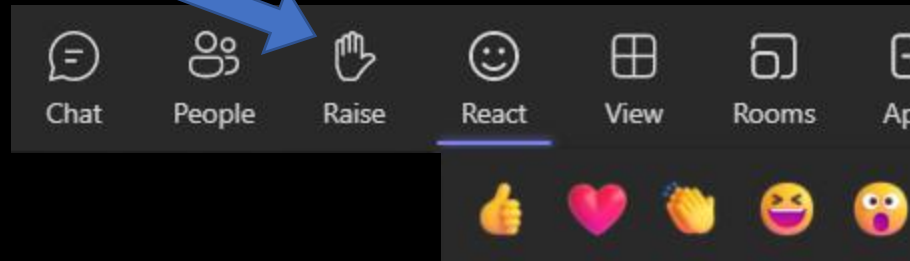


The chat is not captured automatically.

Do you have any accessibility challenges with this technology today?

Comments/Questions?

Please raise your virtual hand or chime in
Chat & reactions also welcome



“...” More includes:

- ✓ Settings: mic & video
- ✓ Background effects

Heads up:

“Spotlighting” Speakers





Reminder of RPAC Purpose & Role



Purpose

...to support Alliance success by **advising** on the **optimal composition of NEEA's program portfolio**, including a **formal vote for program advancement** at **two** key points in the Initiative Lifecycle, **consistent with the goals and objectives of NEEA's Business & Operations Plans**.



Responsibilities

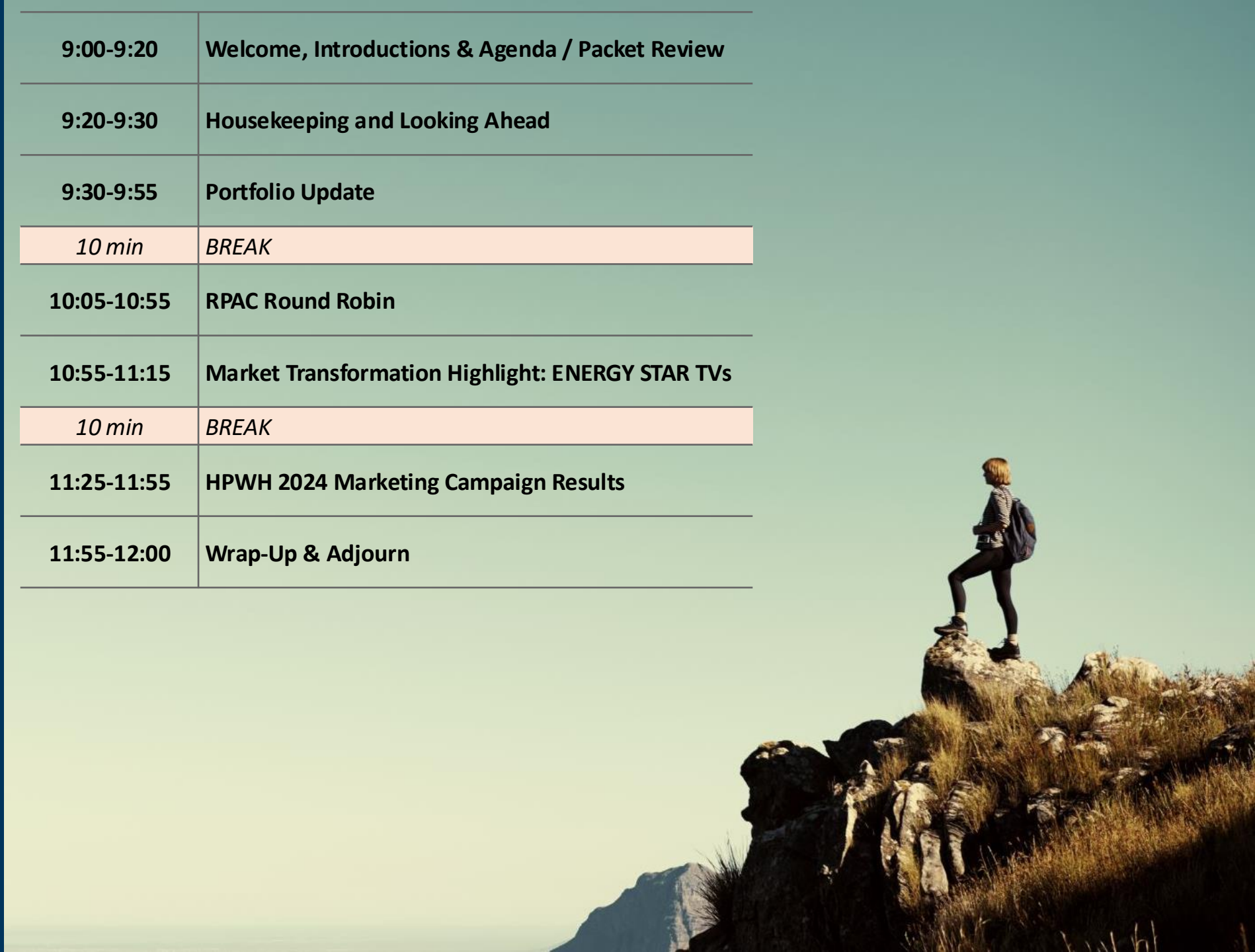
- **Portfolio optimization & program advancement (milestone votes)**
- **Coordinate downstream marketing (RPAC+)**
- **Oversee coordinating committees and workgroups**
- **Monitor outcomes of all advisory committees**
- **Advises NEEA's Executive Director on portfolio decisions**



Agenda

All Times Pacific

9:00-9:20	Welcome, Introductions & Agenda / Packet Review
9:20-9:30	Housekeeping and Looking Ahead
9:30-9:55	Portfolio Update
10 min	BREAK
10:05-10:55	RPAC Round Robin
10:55-11:15	Market Transformation Highlight: ENERGY STAR TVs
10 min	BREAK
11:25-11:55	HPWH 2024 Marketing Campaign Results
11:55-12:00	Wrap-Up & Adjourn



Packet Review & Informational Updates

Tier 1: Agenda Items

- ✓ *NEEA Reports Feedback Survey (pg. 3)*
- ✓ *Portfolio Review: Look Back & Look Ahead (pg. 4)*
- ✓ *MT Highlights: ENERGY STAR® TVs (pg. 5)*
- ✓ *Results Share-out: 2024 HPWH Marketing Campaign (pg. 6)*

Tier 2: Informational Updates

- ✓ *Northwest Online Marketplace Update (p. 8)*
- ✓ *Committee Updates (p. 9)*

Tier 3: Additional Resources *(links on pg. 2)*

- ✓ *Committee materials (charters & recent meeting resources)*
- ✓ *Functional newsletters (Market Research & Evaluation, Emerging Tech, Codes, Standards, & New Construction)*



Introductions

- Name
- Organization
- *And...*

XXX



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Housekeeping & Looking Ahead

- NEEA Reports Audit / Feedback [Survey](#)
- Looking Ahead
 - Upcoming Meetings & Events

Feedback Requested on NEEA Reports

- Assessing value/content of various NEEA reports
- **REQUEST:** Take survey by Fri Feb 21
- May lead to streamlining materials and/or communication channels

Efficiency Exchange 2025

Early Bird Registration

February 18 – April 25

neea.org/EFX

EFX25 Hybrid Conference

May 20-21 in Portland

In-person + Virtual



2025 RPAC Meeting Dates

Quarter	Day(s)	Date(s)	TIME	LOCATION
Q1	Tues	Feb 11	9-4	Virtual
 Q2	Thurs	May 22	9-4	Hybrid @ NEEA (day after EFX) 
Q3	Wed	Aug 20	9-4	Virtual
Q4	Mon	Nov 3	9-4	Virtual

 = Proposed Hybrid / In-person Option

***Other regional /
industry events or
announcements?***



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Portfolio Update: Look Back, Look Ahead

Emily Moore, Director – Market Strategy & Execution





2024 Market Progress highlights

- 1. Increase in HPWH sales for replacements*
- 2. ENERGY STAR Retail Products Platform market share exceeds 30%*
- 3. Two new pumps manufacturer rep firms added to XMP program*
- 4. NEEA influence on national specifications for residential heat pumps*
- 5. Market partners poised to carry forward Northwest-grown Strategic Energy Management assets*

Look Ahead

2025 Operations Plan Goals and Focus Areas

- Increase regional adoption of HPWH and focus on barriers to market acceptance of the future federal standard
- Expedite programs to accelerate market change
- Prioritize opportunities that contribute to peak load reduction and decarbonization
- Advance strategic account management practices to increase scale and build extra-regional alignment

Look Ahead

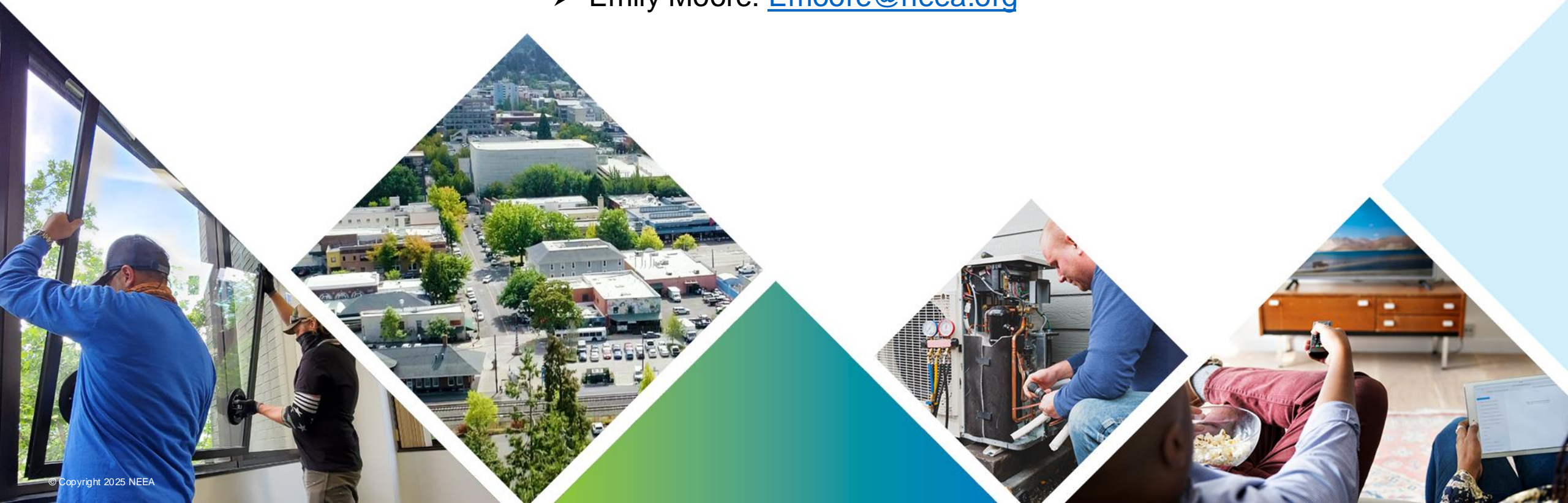
Potential 2025 Program Advancements

- No new programs planned in 2025
- Adding gas high-efficiency DOAS to existing electric High-Performance HVAC program (~Q4 2025)
 - Program Change for RPAC
 - Gas portfolio advancement decision for the Natural Gas Advisory Committee

Questions?

Thank you!

➤ Emily Moore: Emoore@neea.org





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Round Robin Updates

Focus: Organizational & program highlights since November

- Big changes (programs/personnel)
- Current challenges, lessons learned
- How utility activities relate to NEEA's
- Sharable tools/materials
- Equity, hard-to-reach markets
- Findings, filings, IRPs



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ENERGY STAR® TVs: A Market Transformation Highlight

- **Emily Moore, Director – Market Strategy & Execution**
- **Steve Seminario – Market Transformation Manager, Consumer Products**





NEEA & TVs: A Long History

Market Transformation efforts begin
with **ENERGY STAR v3** in 2008

Dynamic, technology driven
product category change

Focus shifts to **new test
procedure** in 2018

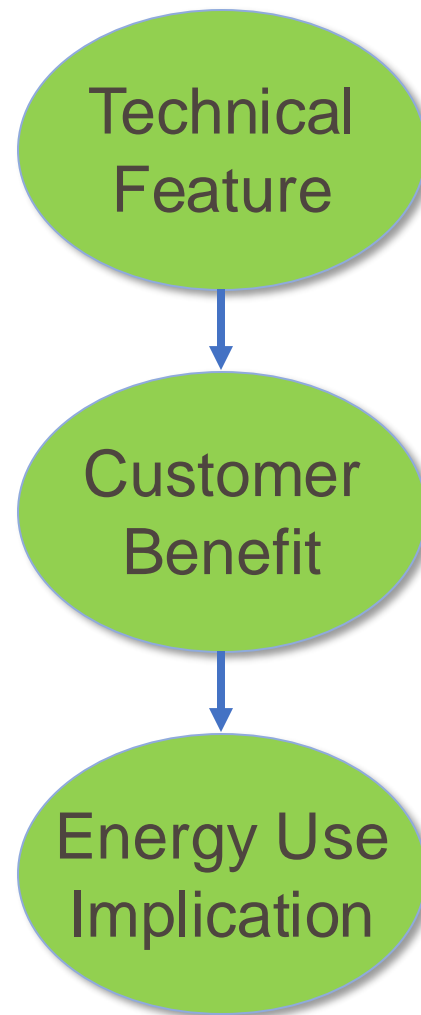
67% reduction in TV watts/sq.
in. over first 4 successive
ENERGY STAR standards

Savings and adoption stall with
ENERGY STAR v8



Innovation in Pursuit of Customer Benefits

- Picture quality
- Slim form-factor
- Streaming content delivery
- Smart wake
- High Dynamic Range content

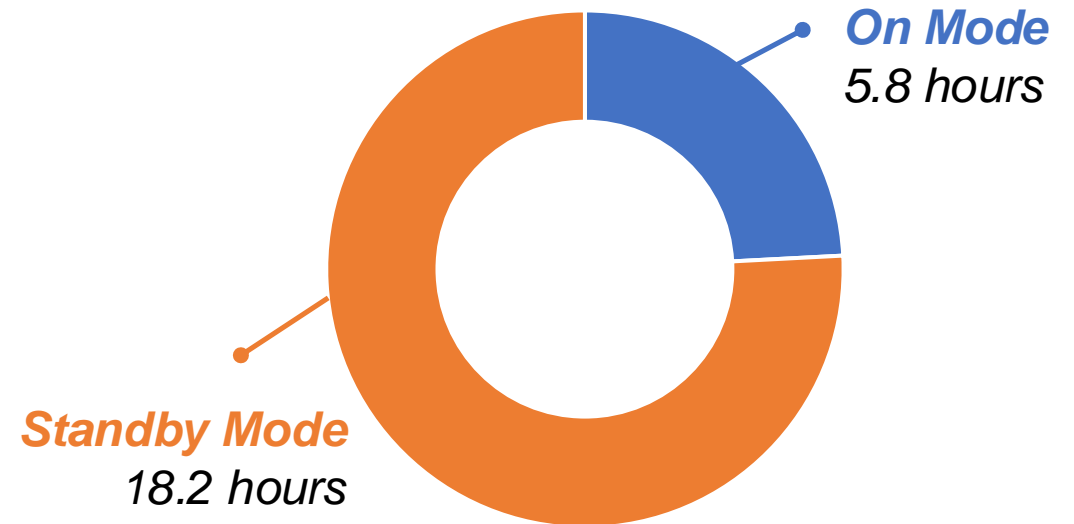




One Example: Smart Wake

18.2 hours per day at 14 Watts
vs 0.5 Watts makes a difference

Round-the-Clock Impact Daily TV Use in US Homes



Source: Energy Consumption of Consumer Electronics in US Households in 2020. Fraunhofer USA CMI. Aug 2021



Focus on Trusted Test Procedure

- Six-year effort culminating in ANSI/CTA 2037-D, and
- Adoption by:
 - Department of Energy (DOE)
 - EPA for ENERGY STAR v9.1
 - California Energy Commission (CEC)
 - North America Manufacturers' Voluntary Agreement (VA)
 - International Electrotechnical Commission (IEC)
 - China National Institute of Standardization (CNIS)
- Test kits installed with manufacturers around the globe
- 650+ TV models tested with ANSI/CTA 2037-D



In process

In discussions



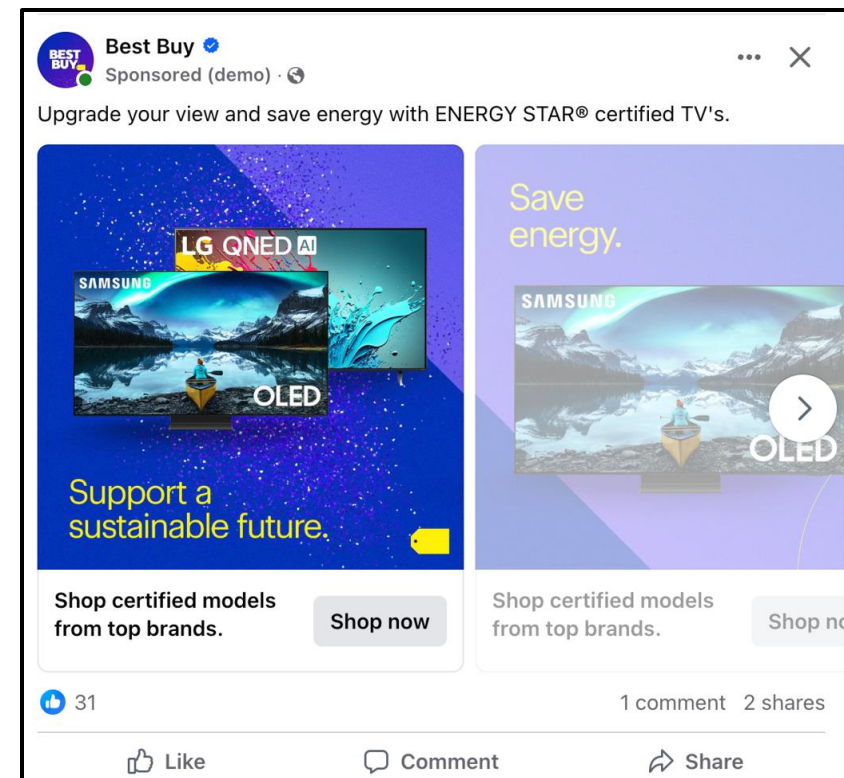
Making TV Energy Efficiency a “Care about”

- ENERGY STAR v9.1 for TVs sets a solid bar
- Barriers
 - Low awareness among consumers that energy use of TVs matters
 - Low adoption of ENERGY STAR v9.1 by manufacturers
- Interventions
 - Bringing mid-stream incentives back to ENERGY STAR TVs (ESRPP)
 - Prove that Energy Efficiency can be a factor in consumer purchases



Ads Promote *ENERGY STAR* TVs to the Northwest

- Best Buy digital properties and social media
- Promising results to date
- ESv9.1 TV unit sales as percent of the market
 - EPA: Estimate for North America 1%
 - Best Buy: Share of all their TV sales 3%
 - NEEA/BBY Ads: Share of linked unit sales 8.9%
- Opportunity: Leverage this success with other key stakeholders





Amplify the Results through Partners

- TV manufacturers with ENERGY STAR models
- TV manufacturers without ENERGY STAR models
- ESRPP Sponsors looking for TV energy savings
- Environmental Protection Agency (EPA) who markets the ENERGY STAR consumer brand

Message: Here's data that shows energy efficiency positively impacts consumers' TV buying decisions

Questions?

Thank you!

➤ Steve Seminario: Sseminario@neea.org



Break



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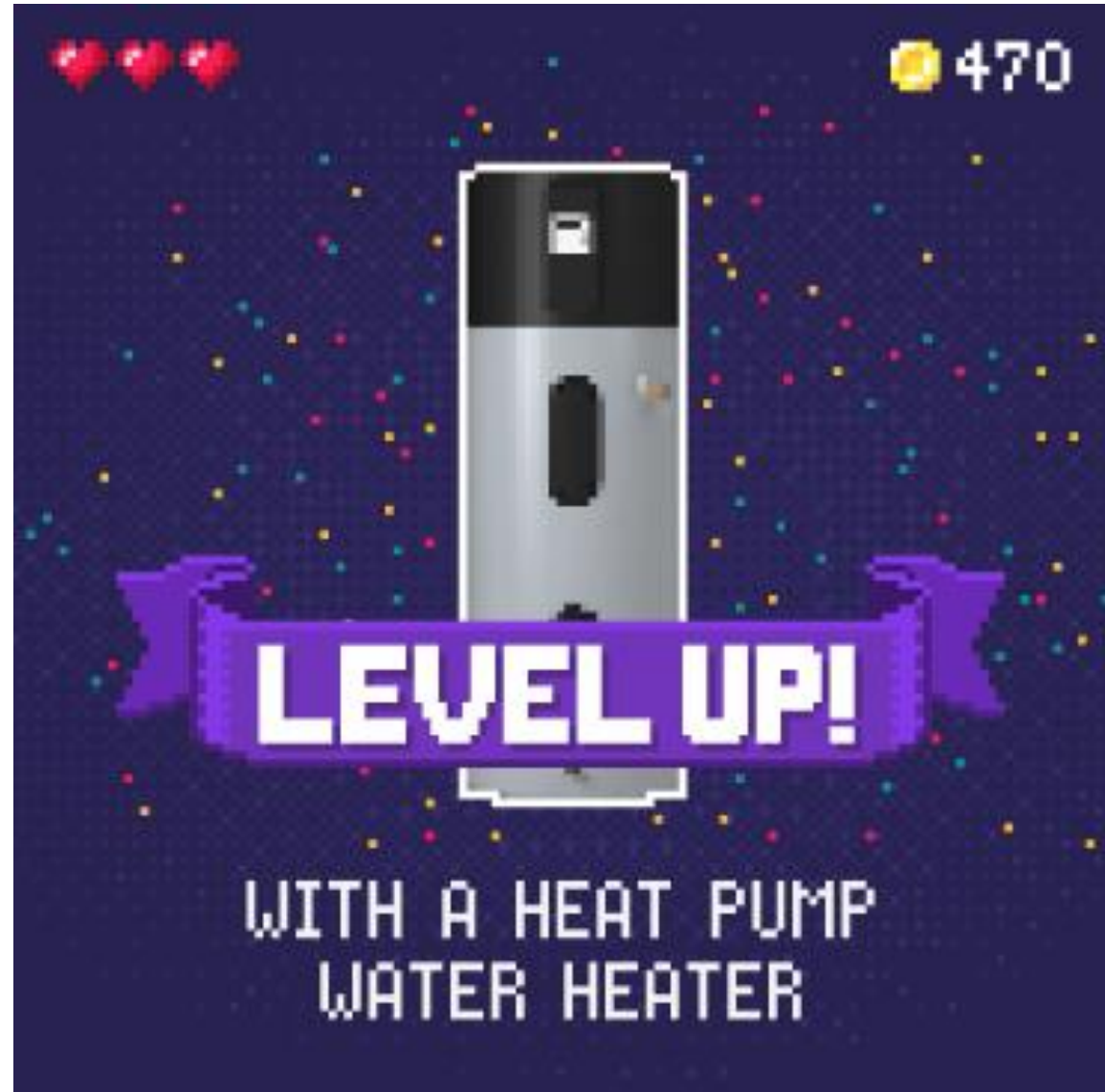
Marketing Campaign Results:

2024 Heat Pump Water Heater Level Up Campaign

- **Emily Rosenbloom – Sr. Program Manager, HPWH**
- **Britt Cutsforth Dawkins – Manager, Program Marketing Strategy**



2024 Level Up Campaign Overview

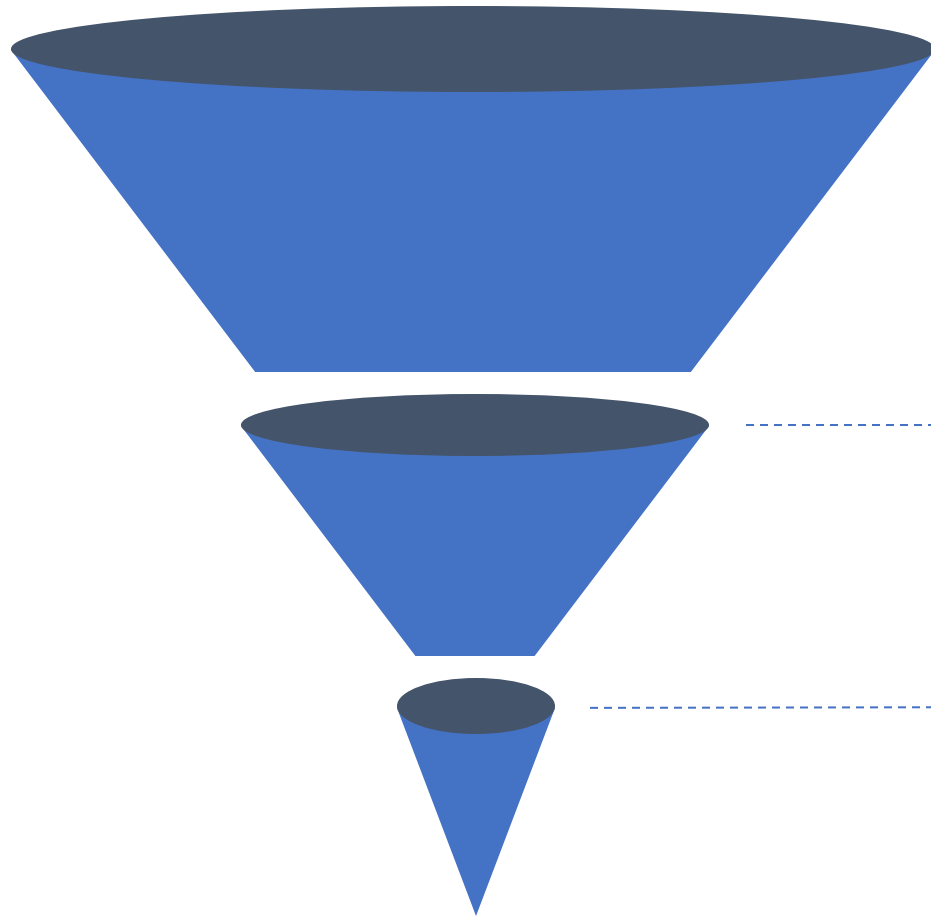


2024 Level Up Campaign Plan



- Brand: Hot Water Solutions, benefitting all market actors
- Timing: August through October 2025
- Channels: Digital and social media
- Media spend: \$190K
- Calls-to-action
 - From ads: Drive traffic to HotWaterSolutionsNW.org landing page
 - From landing page: Drive traffic to find an installer, check for utility rebates, or locate a retailer

Context: Marketing Funnel



Awareness: Consumers are aware that HPWHs exist, but don't know much beyond that. The majority of consumers in the alliance's region (57%+) have some level of awareness about HPWHs.

Consideration: Consumers in this stage have an improved awareness of HPWHs and they understand the value it offers them. A HPWH is a water heating solution they would consider.

Conversion: Consumers understand the value of a HPWH and want one. They proactively ask for a HPWH when they need to replace their existing electric water heater.

Campaign Strategies

To ensure the HPWH Program continues to move consumers along their journey *and ultimately drive long-term downstream demand* for HPWHs, the Level Up campaign had to:

- Continue increasing consumer awareness of and consideration for HPWHs
- Educate consumers who have an existing level of awareness of the value proposition of HPWHs



Level Up Campaign High-Level Metrics: Good Consumer Response!

- 24 million+ impressions
- 104,903 clicks to the Level Up campaign landing page
 - Slightly higher than the 2021 and 2022 campaigns
- 0.44% total campaign clickthrough rate (CTR)
 - Right in line with 0.47% CTR in the 2022 campaign, which is 3x higher than the 2021 campaign
 - Comprised of the Facebook/Instagram (1.34% CTR) and display ad (0.09% CTR) performance
- 1,379 marketing conversions
- ~60 consumer comments

2024 Level Up Campaign Takeaways





Takeaway #1: We continue to see good results across the Northwest

- **Facebook and Instagram**

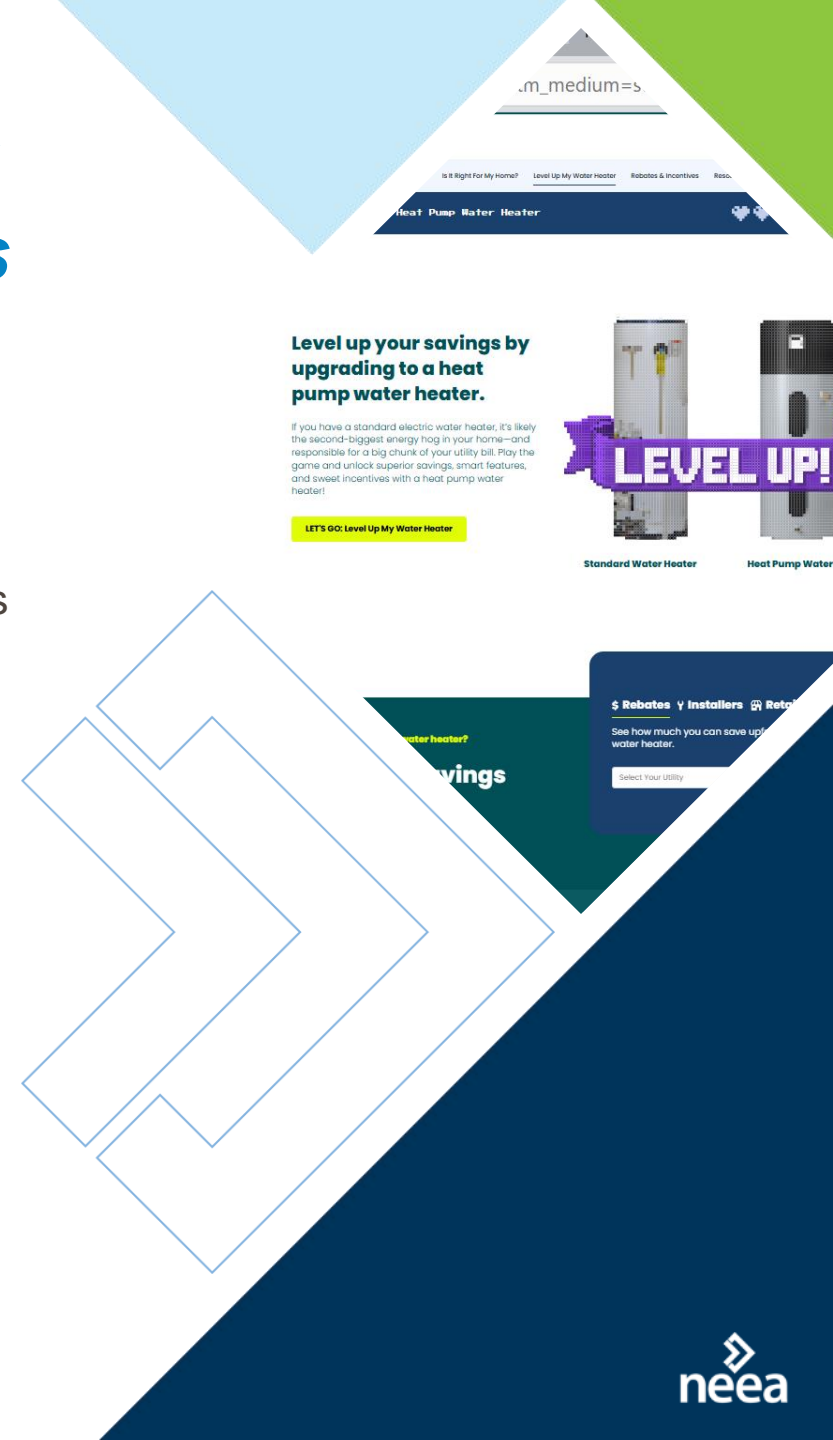
- Across all states, urban audiences showed slightly higher average engagement (1.42% CTR) compared to rural audiences (1.24% CTR), suggesting pre-existing and stronger awareness of HPWH in urban areas
- Both of these CTRs are significantly higher than the 0.67% CTR on Facebook/Instagram in 2022

- **Display ads**

- Urban areas drove the highest number of conversions
- Consumers who responded to a display ad were most likely to then click on Rebates (marketing conversion)

Takeaway #2: Optimized ad messaging and landing page could drive deeper awareness and consideration

- **Retargeting tactics**
 - Rural audiences in particular responded well to these follow-up ads—tailored “come back” messaging could further re-engage these consumers
- **The Level Up landing page**
 - Testing different elements in future campaigns would likely increase engagement
- **Find Installers button**
 - Campaign-wide, the largest number of conversion clicks were on the “Find Installers” button, followed by the “Find Rebates” button
- **Retargeting with display ads**
 - Targeting repeat visitors with display ads proved to be the most effective strategy in driving conversions





Takeaway #3: We should expand marketing tactics to reach all audiences

- The campaign's Facebook ads (in particular) performed very well with the 55+ age demographic...
- ..but to reach all audiences across the Northwest, we need to explore different marketing tactics and placements to expand awareness and consideration

Planned Timeline for 2025 To-Be- Proposed Campaign

- Q2 2025 RPAC/RPAC+ meeting
 - Present an optimized *Level Up* consumer campaign (May 22)
- Q3 2025 RPAC/RPAC+ meeting
 - Hold campaign elections (Aug 20)
 - Campaign launches (if approved)
- Q4 2025
 - Campaign concludes
- Q1 2026 RPAC/RPAC+ meeting
 - Results shareout (early Feb 2026)

Questions?

Thank you!

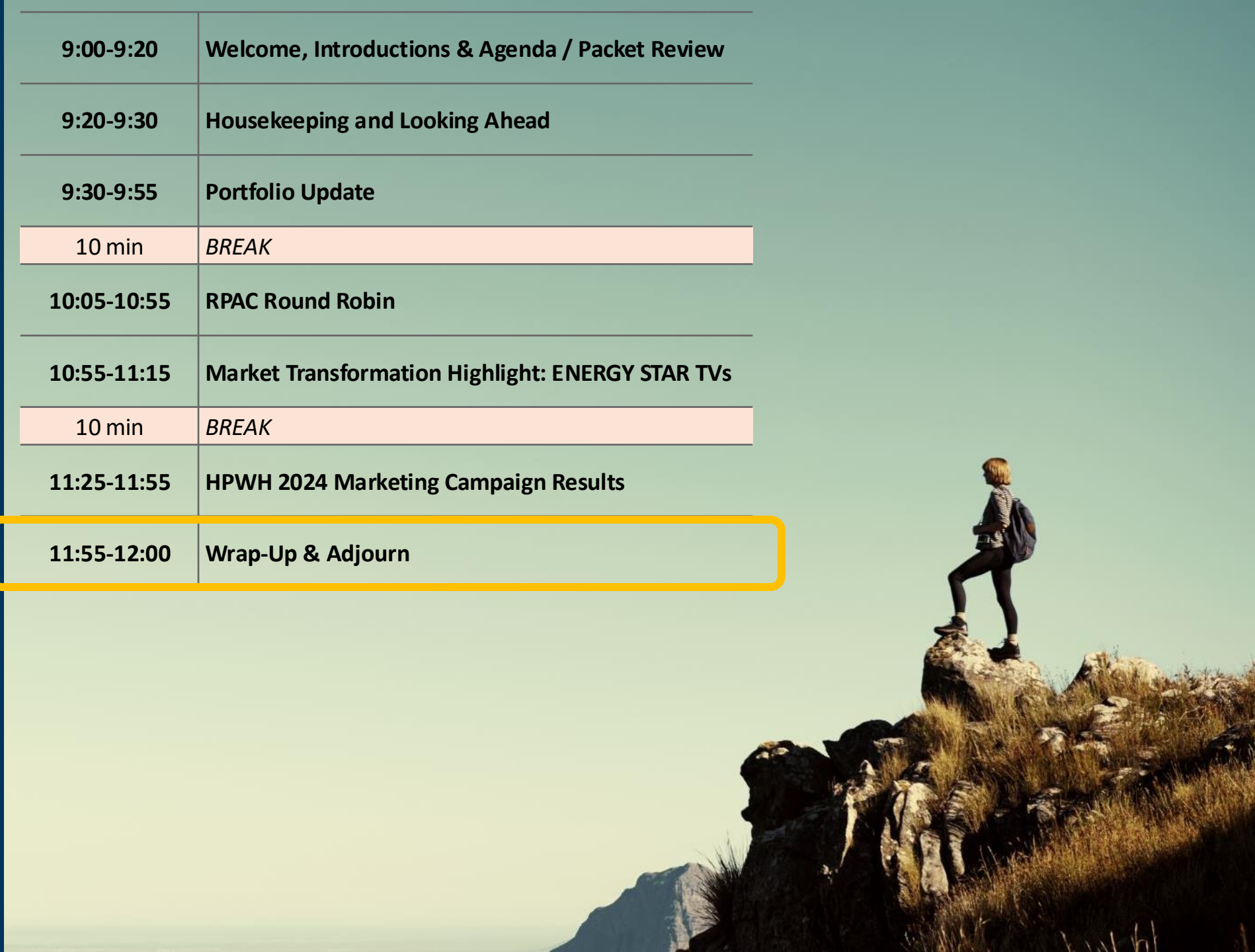
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A piece of brown paper with a string tied in a bow. The string is a light brown, twisted cord. It is tied in a bow that is centered horizontally and slightly above the vertical center. The bow has two loops on the right side and two tails extending downwards. The background is a solid, textured brown paper.

Let's wrap it up!



Action Items / Recap / Final Qs?



Meeting Feedback

- ❖ One thing you learned / appreciated?
- ❖ Opportunities for improvement?
- ❖ Would you like us to follow up with you on anything?



Public Comments?

Thank You!

That's a wrap RPAC! Until we meet again...

➤ Q2 2025: Thursday May 22 | Hybrid (day after EFX @ NEEA)



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