Newsletter / September 19, 2025

Q3 2025: Market Research + Evaluation

Introduction

Greetings readers,

The newsletter has had a makeover! We hope that the new look will make it easier for you to find information about each Market Research + Evaluation (MRE) study's purpose, timing, and results. If you have questions or feedback about the new layout, please let us know.

Several projects are sharing final results before the end of the year, including Market Progress Evaluation Reports for Luminaire Level Lighting Controls (LLLC), Efficient Rooftop Units and High-Performance (HVAC) programs. Several Codes and Standards projects are also reporting in the upcoming quarter. In addition, third-party model reviews are being fielded or reported for the LLLC and Retail Product Portfolio programs, as well as Codes. Finally, the Ductless Heat Pump program is sharing results from its third Market Diffusion Evaluation, which are studies conducted to support continued monitoring and market progress after program interventions have sunset.

If you have any questions about NEEA's MRE studies and activities, please let us know and we'll be happy to connect with you.

~Zdanna King, Sr. MRE Scientist

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PROJECT STAGE DEFINITIONS

MRE projects can develop rapidly, spanning more than one stage in a given quarter that is reported on in the newsletter. In cases where multiple stages are anticipated, we categorize the project in the furthest attainable phase for this quarter.

- *PLANNING: MRE projects from inception through proposal selection*
- *FIELDING: MRE projects from kick-off through the completion of field work*
- *REPORTING: MRE projects in the analysis/synthesis stage through report posting*

Integrated Systems (HVAC, Lighting, Motors)

ERV/HRV Ownership and Maintenance Market Research — *Kirstin Moreno*

Product Group: *Commercial HVAC Product Group*

Project Stage: *FIELDING*

Description	*Both of NEEA's commercial HVAC programs (Efficient Rooftop Units and High-Performance HVAC) rely on Energy Recovery Ventilators and/or Heat Recovery Ventilators (ERV/HRVs) as key components that contribute significant energy savings. There are some concerns in the market that this equipment is complicated or time-consuming to maintain and clean, which is a potential barrier to wider adoption.* *To investigate the lived experience of owning and caring for ERV/HRVs in commercial HVAC applications, the market researcher will conduct 3-4 field observations of ERV cleaning/maintenance sessions and 12-15 in-depth interviews with market actors, such as manufacturer representatives, building owners, facilities managers, and service contractors.* *Fuel Type: Electric (High-Performance HVAC)* *Fuel Type: Gas (Efficient Rooftop Units)*
Research Objectives	• *Gather perspectives on operational considerations of installing, commissioning, cleaning, and maintaining ERVs/HRVs.* • *Investigate what ERV/HRV cleaning and maintenance looks like in real-world applications.*
Timing	*The project kicked off in August 2025 and will run through December 2025. A final report is anticipated in Q1 2026.*
Third-Party Contractor(s)	*MarketWise Advising, LLC*

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #1 — *Meghan Bean*

Program: *Advanced Heat Pumps*

Project Stage: *FIELDING*

Description	*NEEA is planning to conduct the first MPER for the Advanced Heat Pump program. The selected contractor will review secondary documents, conduct in-depth interviews with key market actors, and analyze the program progress to date.* *Fuel Type: Electric*
Research Objectives	• *Document the strategies and activities the Advanced Heat Pump program is pursuing for each of the efficiency improvements the program is targeting.* • *Document the status of key Market Progress Indicators (MPI) identified by NEEA.*
Timing	*This work will kick off in Q3 2025 and conclude in Q3 2026.*

Integrated Systems (HVAC, Lighting, Motors)

Installation Contractor Market Research — *Meghan Bean and Anu Teja*

Program: *Advanced Heat Pumps & Dual-Fuel Residential HVAC*

Project Stage: *FIELDING*

Description	*NEEA is planning to conduct market research with residential HVAC installation contractors to inform strategy for the active Advanced Heat Pump program and support a potential Dual-Fuel HVAC program that is currently in the Concept Development phase of NEEA's initiative lifecycle.* *Fuel Type: Dual-Fuel*
Research Objectives	*Conduct focus groups to gather in-depth, qualitative information on the following topics:* • *Descriptions of the typical heat pump selection and sales process, addressing dual-fuel, single-speed, and variable-speed configurations, including communication with purchasers/end-users.* • *Installers' attitudes toward and decision-making around installing supplemental heat in centrally-ducted heat pumps.* • *Installers' commissioning practices for heat pump installations.* • *Which features, if any, installers would value in a new connected commissioning product.*
Timing	*This work will kick off in Q3 2025 and conclude in Q1 2026.*

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #1 — *Kirstin Moreno*

Program: *High-Performance HVAC*

Project Stage: *REPORTING*

Description	*NEEA's High-Performance HVAC program is intervening to transform the market for very high efficiency dedicated outside air systems (DOAS) for electrically heated commercial buildings across the region. This study is the first evaluation of the program's Market Transformation efforts.* *The MPER entailed expert review of NEEA materials, HVAC designer interviews, observation of NEEA trainings and fast-feedback surveys with NEEA trainees, designer surveys, a web scan and web traffic review, and document review.* *Fuel Type: Electric*
Research Objectives	• *Provide timely and actionable formative evaluation findings and recommendations to enable continuous improvement of the program.* • *Assess market transformation progress as measured by program Market Progress Indicators (MPI).* • *Qualitatively assess program influence on observed market transformation.*
Top Results	• *There is generally high awareness of the benefits of the very high efficiency DOAS approach among specifiers.* • *While very high efficiency DOAS materials have started to proliferate out to other organizations and websites, there is still opportunity to align with key partners and organizations on NEEA's recommended approach.* • *NEEA's training and educational materials are valuable and impactful.* • *Market barriers limiting very high efficiency DOAS adoption were confirmed and include upfront cost and uncertainties regarding reliability and energy savings.*
Timing	*The project kicked off in Q3 2023, data collection wrapped up in Q1 2025, and a final report was posted in Q3 2025.*
Third-Party Contractor(s)	*NMR Group (partnered with Apex Analytics)*
Link to Report	High-Performance HVAC Market Progress Evaluation Report #1

Integrated Systems (HVAC, Lighting, Motors)

Gas High Efficiency DOAS Baseline and Key Assumptions Review — *Kirstin Moreno*

Program: *High-Performance HVAC*

Project Stage: *PLANNING*

Description	*To support the potential expansion of the electric High-Performance HVAC program to include gas high efficiency dedicated outdoor air systems (DOAS), NEEA is planning a third-party review of gas high efficiency DOAS's newly developed Naturally Occurring Baseline and key assumptions for savings rates, market adoption tracking, and incremental costs.* *Fuel Type: Natural Gas*
Research Objectives	• *Review and validate NEEA's Naturally Occurring Baseline for gas high efficiency DOAS.* • *Review and validate NEEA's Key Assumptions for gas high efficiency DOAS.*
Timing	*The review is anticipated to kick off in Q4 2025. A final report is anticipated in Q1 2026.*

Integrated Systems (HVAC, Lighting, Motors)

Gas High Efficiency DOAS Specifier Market Research — *Kirstin Moreno*

Program: *High-Performance HVAC*

Project Stage: *FIELDING*

Description	*To support potential expansion of the High-Performance HVAC program to include gas high efficiency dedicated outdoor air systems (DOAS), this market research study explores market barriers to adoption and supply chain perspectives. Study methods include a survey and in-depth interviews with specifiers, and asynchronous reviews of gas high efficiency DOAS configurations.* *Fuel Type: Natural Gas*
Research Objectives	• *Confirm which opportunities and barriers previously identified for the uptake of all-electric very high efficiency DOAS also apply to gas high efficiency DOAS and identify any additional barriers and opportunities specific to gas high efficiency DOAS.* • *Gather specifiers' perspectives on advantages, disadvantages, and use cases of potential gas high efficiency DOAS configurations.* • *Describe building types, market actors, early adopters, value proposition and decision processes for gas high efficiency DOAS highlighting how they differ from all-electric very high efficiency DOAS.*
Timing	*The market research began in Q2 2025 and a final report is anticipated in early Q4 2025.*
Third-Party Contractor(s)	*OWL Research Associates*

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #1 — *Kirstin Moreno*

Program: *Efficient Rooftop Units (RTU)*

Project Stage: *REPORTING*

Description	*NEEA's Efficient RTU program is actively working to transform the market for efficient RTUs in gas-heated commercial buildings across the region. This study is the first evaluation of the program's Market Transformation efforts.* *The evaluation team conducted focus groups with two small groups of commercial building decision-makers (e.g., building owners, operators, and facilities managers); surveyed commercial building decision-makers across the region; interviewed individuals who have or have considered having an efficient RTU on their building; and conducted focused interviews with a small number of manufacturer representatives active in the Northwest efficient RTU market.* *Fuel Type: Natural Gas*
Research Objectives	• *Provide timely and actionable formative evaluation findings and recommendations to enable continuous improvement of the program.* • *Assess market transformation progress measured by program MPIs.* • *Qualitatively assess program influence on observed market transformation.*
Top Results	• *A need to more clearly distinguish interventions for bolt-on versus integrated Energy Recovery Ventilators.* • *Efficient RTUs are seen by the market as niche products instead of replacement products.*
Timing	*This project began in Q2 2023. Data collection wrapped up in Q1 2025, and a final report was posted in Q3 2025.*
Third-Party Contractor(s)	*Apex Analytics*
Link to Report	Efficient Rooftop Units Market Progress Evaluation Report #1

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #3 — *Zdanna King*

Program: *Luminaire Level Lighting Controls (LLLC)*

Project Stage: *REPORTING*

Description	*The third MPER for the LLLC program is crucial for tracking changes in the market that indicate whether the LLLC program is effective in overcoming identified market barriers.* *Report activities included document reviews, as well as interviews and surveys with program team members, manufacturers and their sales channels, installers, designers, architects, engineers, and commercial building decision-makers to address the objectives.* *Fuel Type: Electric*
Research Objectives	• *Review and verify that the strategic activities described in the LLLC program's quarterly progress tracking documents and outlined in its logic model since the previous MPER were conducted.* • *Track identified MPIs focused on measuring the reduction of identified market barriers and conduct year-over-year analyses when indicated to report progress on several program outcomes predicted by the logic model.* • *Conduct market research to describe the rationale of buyers and sellers of LLLC that include it in their initial project plans, but do not follow through with the sale.*
Timing	*This project began in Q3 2024, with data collection taking place between Q4 2024 and Q2 2025. The final report is anticipated in Q3 2025.*
Third-Party Contractor(s)	*Cadmus Group*
Link to Previous MPER	Luminaire Level Lighting Controls: Market Progress Evaluation Report #2

Integrated Systems (HVAC, Lighting, Motors)

LLLC Key Assumptions Review — *Zdanna King*

Program: *Luminaire Level Lighting Controls (LLLC)*

Project Stage: *FIELDING*

Description	*The LLLC program is planning to conduct a third-party assessment of the regional market share represented by NEEA's aggregated LLLC sales and rebate data. This study would replicate an earlier one conducted, using data sources to conduct a top-down analysis of likely market penetration of LLLC in the Northwest and what percentage of the market the summarized data from NEEA likely represents.* *Fuel Type: Electric*
Research Objectives	• *Review the LLLC program's estimates of market share represented by their aggregated and anonymized sales and rebate data to substantiate and, if necessary, revise a key assumption for reporting regional energy savings.*
Timing	*This project will begin in Q3 with a final report anticipated in Q4 2025.*

Integrated Systems (HVAC, Lighting, Motors)

Industrial Market Research — *Chris Cardiel*

Product Group: *Motor-Driven Systems*

Project Stage: *PLANNING*

Description	*NEEA plans to field a study of the dynamics of the regional industrial market to increase market insight across programs within the Motor-Driven Systems Product Group (including Efficient Fans and Extended Motor Products – Pumps) and to inform opportunity assessment related to adjustable-speed drives.* *Fuel Type: Electric*
Research Objectives	*Specific objectives of this study are under development, but may include assessment of market actor relationships, decision-making factors related to selection of relevant products, and identification of market barriers distinct to the industrial sector.*
Timing	*Project kick off is anticipated in Q4 2025, with fielding occurring through Q3 2026. A final report is anticipated by the end of Q3 2026.*

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #2 — *Chris Cardiel*

Program: *Extended Motor Products (XMP) – Pumps*

Project Stage: *FIELDING*

Description	*NEEA's Extended Motor Products – Pumps program actively engages with manufacturers' representatives, trade associations, and other market actors to increase adoption of energy-efficient motor-driven products (specifically clean-water pumps and circulators at or below 50 horsepower) across the four-state region.* *In this second MPER, specific methodologies are likely to include a combination of survey questionnaires and in-depth interviews to support continued tracking of the program's MPIs.* *Fuel Type: Electric*
Research Objectives	• *Build on the results of XMP – Pumps MPER #1 by conducting the second cycle of tracking MPIs and reporting progress on near-term outcomes.* • *Conduct formative evaluation of market actor perceptions and attitudes (particularly trust and perceived relevance) regarding the Hydraulic Institute's Energy Rating label for pumps and circulators.*
Timing	*The study is anticipated to kick off by the end of Q3 2025. The evaluation will occur through Q2 2026, with a final report anticipated in early Q3 2026.*
Link to Previous MPER	Extended Motor Products Market Progress Evaluation Report #1

Integrated Systems (HVAC, Lighting, Motors)

Agricultural Pumps Market Research — *Chris Cardiel*

Program: *Extended Motor Products (XMP) – Pumps*

Project Stage: *FIELDING*

Description	*To support ongoing program planning and opportunity assessment for the XMP – Pumps program, NEEA is fielding a research study exploring the dynamics of the agricultural pump market across NEEA's four-state region.* *Study methods include a robust literature review paired with in-depth interviews with members of key agricultural professionals (manufacturers and representatives, specifying engineers, contractors, and end users) to seek input and insight from professionals active in the agricultural pump market.* *Fuel Type: Electric*
Research Objectives	• *Identify and prioritize agricultural market barriers to the uptake of highly efficient pumps for irrigation purposes.* • *Document market actor motivations and agricultural irrigation pump path-to-purchase.* • *Assess the accuracy of key market projections documented in NEEA's 2013 Agricultural Irrigation Market Characterization, specifically as pertaining to regional irrigated agricultural acreage and market actor technology usage.*
Timing	*The study kicked off in Q4 2024, with instrument development and sample preparation completed in Q1 2025. Primary data collection is scheduled to run through mid-Q3 2025, followed by data analysis and report preparation. The final report is anticipated early in Q4 2025.*
Third-Party Contractor(s)	*Resource Innovations*

Integrated Systems (HVAC, Lighting, Motors)

Fan Manufacturer Representative and Specifier Market Research — *Chris Cardiel*

Program: *Efficient Fans*

Project Stage: *FIELDING*

Description	*NEEA is conducting a market research study in support of continued refinement of the Efficient Fans program's design and intervention strategy.* *Study methods include in-depth interviews with a total of 20 manufacturer representatives and specifying engineers, with questions focusing on market actor relationships, sales and installation processes and pain points, and understanding of language used by the Efficient Fans program to describe products targeted for market intervention.* *Fuel Type: Electric*
Research Objectives	• *Compile a robust list of Commercial and Industrial stand-alone fan manufacturer representatives and specifying engineers active in the four-state region (ID, MT, OR, and WA).* • *Identify and document key communication and relationship dynamics between fan system market actors (including particularly influential sources of information).* • *Identify and document persistent challenges endemic to the stand-alone fan specification, sale, and installation process as experienced by manufacturer representatives and specifying engineers; and* • *Solicit input from regionally active stand-alone fan manufacturer representatives and specifying engineers regarding the clarity, sensibility, and appropriateness of programmatic language and terminology related to in-scope fan systems.*
Timing	*This work kicked off in Q4 2024 and was fielded in Q2 and Q3 2025. The final report is anticipated in Q4 2025.*
Third-Party Contractor(s)	*DNV Energy Insights, Inc.*

Products (Consumer Products, Water Heating)

Dishwashers ENERGY STAR® 7.0 Assessment — Zdanna King

Product Group: Consumer Products

Project Stage: FIELDING

Description	Assess what impact NEEA's involvement may have had on the timing or stringency of the most recent ENERGY STAR Version 7.0 Residential Dishwasher specification revision process. During the revision period, NEEA provided web-scraped data and analysis that showed a 90% market share penetration estimate for ENERGY STAR v6.0 rated dishwashers, while also supporting cleaning efficacy specifications in energy-efficient dishwashers in a comment letter during ENERGY STAR v7.0 rating development. Fuel Type: Electric
Research Objectives	• Describe and document NEEA's engagement with the ENERGY STAR Version 7.0 Residential Dishwasher specification revision process. • Describe how NEEA's engagement may have impacted the timing and stringency of the ENERGY STAR Version 7.0 Residential Dishwasher specification.
Timing	The project is planned to begin in Q3 2025 with a final report anticipated in Q1 2026.

Products (Consumer Products, Water Heating)

Market Progress Evaluation Report (MPER) #3 — *Zdanna King*

Program: *Retail Product Portfolio (RPP)*

Project Stage: *FIELDING*

Description	*The third RPP MPER is tracking the program's progress in overcoming market barriers through document and sales data review, web-scraping analysis, and in-depth interviews with program staff and external collaborators.* *Fuel Type: Electric*
Research Objectives	• *Document activities and outputs for each product in the RPP program (clothes washers, clothes dryers, all-in-one washer/dryer combinations, refrigerators, room air conditioners, and televisions) and assess progress on applicable outcomes through MPIs.* • *Explore how program activities have influenced manufacturers since the program's inception and recommend how this influence could be assessed in consistent and cost-effective ways beyond those already listed in the logic model, if applicable.*
Timing	*This study began in Q2 2025 and a final report is expected in Q1 2026.*
Third-Party Contractor(s)	*Level 7*
Link to Previous MPER	Retail Product Portfolio Market Progress Evaluation Report #2

Products (Consumer Products, Water Heating)

Televisions Model Review — Zdanna King

Program: Retail Product Portfolio (RPP)

Project Stage: FIELDING

Description	As the RPP program ramps up its support of energy-efficient televisions in the market, NEEA is using aggregated and anonymized sales data and market conditions to create key assumptions necessary for reporting regional energy savings and to develop a Naturally Occurring Baseline of energy-efficient television market penetration forecasted over the next 20 years without NEEA's involvement. Study activities will include a document review and analysis to assess NEEA's key assumptions and baseline and identify recommendations. Fuel Type: Electric
Research Objectives	Specific objectives are in development.
Timing	The project is planned to begin in Q3 2025 with a final report anticipated in Q1 2026.

Products (Consumer Products, Water Heating)

High-Performance Clothes Dryers Naturally Occurring Baseline (NOB) & Key Assumptions Review

Zdanna King

Program: *Retail Product Portfolio (RPP)*

Project Stage: *FIELDING*

Description	*NEEA is conducting this study to review its two NOBs models for high-performance clothes dryers, leveraging subject matter expertise, primary data collection, and literature review.* *Fuel Type: Electric*
Research Objectives	• *Review NEEA's NOBs for ENERGY STAR (v1) clothes dryers to make recommendations, as needed, to revise modeling, taking into account delays in federal standard revisions.* • *Conduct secondary research to assess how NEEA's NOB for heat pump dryers in all- in-one-laundry units may or may not need to be revised, given that this modeling is originally based on stand-alone dryer units, not combination units.* • *Leverage methods used to assess the first two research objectives to explore what NEEA's modeling approach may gain from including bin sizes in its baseline for clothes dryers. If appropriate, make recommendations that share how and why to revise modeling to account for bin sizes.*
Timing	*The project is planned to begin in Q3 2025 with a final report anticipated in Q1 2026.*

Products (Consumer Products, Water Heating)

Market Progress Evaluation Report (MPER) #8 — Anu Teja

Program: *Heat Pump Water Heaters (HPWH)*

Project Stage: *FIELDING*

Description	*The 8th MPER for NEEA's HPWH program is currently underway. The MPER will track program progress toward its predefined market outcomes over the last 18 months. Data collection activities and analysis will continue through the end of Q3 2025. Specific data collection methodologies include quantitative web enabled surveys with purchasers and installers of HPWHs in the region to better understand customer satisfaction and to track their awareness and opinions of HPWHs over time.* *Fuel Type: Electric*
Research Objectives	• *Review and verify that program's strategic activities identified in 2024 were conducted.* • *Track identified MPIs focused on measuring a specified set of program outcomes per the program logic model.* • *Identify nature and prevalence of callbacks to discern how that impacts installers in recommending and installing HPWHs.*
Timing	*Project began in Q1 2025. Data collection occurred from Q1-Q3 2025. A final report is expected in Q4 2025.*
Third-Party Contractor(s)	*NMR Group*
Link to Previous MPER	Heat Pump Water Heater Market Progress Evaluation Report #7

Codes, Standards and New Construction

Market Progress Evaluation Report (MPER) #6 — *Chris Cardiel*

Activity: *Codes*

Project Stage: *FIELDING*

Description	*NEEA is conducting the 6th MPER for its commercial and residential codes efforts. This study is intended to build on and complement the learnings generated through the recently completed Codes MPER #5 and will include ongoing assessment of NEEA's progress in the Northwest codes market relative to recently established MPIs. Study methods include a targeted review of NEEA program materials, interviews with NEEA Codes team and a wide range of code market actors, as well as surveys with individuals who have completed NEEA-sponsored code trainings.* *Fuel Type: Electric*
Research Objectives	• *Assess NEEA's progress on selected logic model outcomes, including those associated with (a) the Codes team's training and education activities, (b) voluntary certification and above code construction, and (c) jurisdictional goals and state-level code support.* • *Conduct a qualitative analysis of NEEA's progress on outcomes associated with its code influence activities conducted during code cycles occurring from 2018 onward, with a particular focus on code influence activities occurring from 2023 onward.* • *Conduct formative evaluation regarding market actor awareness, use, and valuing of key code compliance tools, including the Washington State Energy Code Commercial Technical Support website and webtool, COMcheck, and REScheck.*
Timing	*A project kick-off was held in Q4 2024, with sample development and instrument preparation occurring from Q1 to Q2 2025. Data collection began in Q2 2025 and continued through Q3 2025. Data analysis and initial report preparation are scheduled to occur in late Q3 2025, with a final report anticipated early in Q4 2025.*
Third-Party Contractor(s)	*NMR Group, Inc.*
Link to Previous MPER	Codes Market Progress Evaluation Report #5

Codes, Standards and New Construction

NEEA Codes Baseline and Assumption Review — Meghan Bean

Activity: *Codes*

Project Stage: *REPORTING*

Description	*NEEA is conducting a review of its Naturally Occurring Baselines for commercial and residential energy codes in the Northwest.* *Fuel Type: Electric*
Research Objectives	• *Assess whether NEEA's approach of tracking 100% of the total regional savings as co-created savings for 10 years after construction starts without applying an additional adjustment factor is still the most reasonable Natural Market Baseline for codes.* • *If not, make recommendations for how NEEA should update its baseline and other assumptions to more accurately capture NEEA and its partners' influence on code changes in the Northwest.* • *Assess whether it is appropriate to apply the same approach to all states in the Northwest and to both the residential and commercial sectors.*
Timing	*This project kicked off in Q4 2024, and the final report is expected in Q3 2025.*
Third-Party Contractor(s)	*Industrial Economics (IEc) and Resource Refocus*

Codes, Standards and New Construction

Oregon Residential Code Compliance Evaluation — Meghan Bean

Activity: *Residential Codes*

Project Stage: *REPORTING*

Description	*NEEA is conducting a code compliance evaluation to review assumptions underlying its estimation of energy savings resulting from NEEA's and its partners' involvement in the Oregon state code processes.* *The contractors collected data from permits, conducted site visits to residential new construction building sites, conducted interviews with market actors, and collected data on inhabited homes using homeowner self-audits.* *Fuel Type: Electric*
Research Objectives	• *Assess statewide compliance among single-family homes built under the 2021 Oregon Residential Specialty Code (ORSC).* • *Provide statewide findings regarding primary space and water heating fuel and above-code elements using data collected on individual code requirements.* • *Provide an analysis of builders' choices regarding compliance pathways and efficiency level to which the home is built.*
Timing	*This project kicked off in Q2 2024. The final report is expected in Q3 2025.*
Third-Party Contractor(s)	*Industrial Economics (IEc), Resource Refocus, NMR Group*

Codes, Standards and New Construction

Portable AC and Air Compressor Standards Evaluation — Meghan Bean

Activity: *Standards*

Project Stage: *REPORTING*

Description	*NEEA's Codes and Standards team engaged in efforts to improve the efficiency levels of the federal standards for portable air conditioners and air compressors.* *Fuel Type: Electric*
Research Objectives	• *Qualitatively assess NEEA and its partners' influence on the standards processes.* • *Provide quantitative estimates of the share of savings resulting from the standards that are the result of NEEA and other efficiency organizations' efforts.*
Top Results	• *The portable air conditioners standard evaluation found that NEEA and its partners' activities addressed concerns voiced by manufacturers and influenced the outcome of the adopted standard, estimating that NEEA and its partners influenced 9.1% of the total energy savings resulting from the adopted standard.* • *The air compressors standard evaluation found that NEEA and its partners' activities addressed concerns voiced by manufacturers and influenced the outcome of the adopted standard, estimating that NEEA and its partners influenced 12% of the total energy savings resulting from the adopted standard.*
Timing	*Both evaluations kicked off in Q4 2024 and final reports for both studies are anticipated in Q3 2025.*
Third-Party Contractor(s)	*Michaels Energy*
Link to Reports	Portable Air Conditioners Standard Evaluation Air Compressors Standard Evaluation

Codes, Standards and New Construction

Idaho Commercial New Construction Code Compliance Evaluation — *Chris Cardiel*

Activity: *Commercial Codes*

Project Stage: *FIELDING*

Description	*The Idaho Commercial New Construction Code Evaluation study focuses on (a) assessing the path(s) by which and degree to which code compliance is achieved with the amended 2018 International Energy Conservation Code (IECC) in newly constructed buildings, and (b) measuring the energy performance of a subset of these buildings as compared with the average energy performance of buildings constructed under previous code. The results of the study will provide direction to the development and implementation efforts of the NEEA Codes team and will provide other regional code stakeholders guidance in targeting their energy efficiency work in the commercial new construction sector.* *Fuel Type: Dual-Fuel*
Research Objectives	• *The study design and methodology selected for this project focuses on permit data and building plans as the primary sources of construction and compliance information, with virtual or in-person site visits planned for a subsample of participating buildings to validate the accuracy of permit data.* • *This study was intended to include analysis of billing data; however, insufficient response rates from commercial building operators rendered such analysis unfeasible.*
Timing	*The study kicked off in Q3 2023, followed by sample development and preparation of data collection and recruitment materials. Collection of data is planned to continue through Q3 2025, with analysis and report preparation to follow. A final report is anticipated in Q4 2025.*
Third-Party Contractor(s)	*Opinion Dynamics*

Market Diffusion

Ductless Heat Pump Market Diffusion Evaluation, Year 3 — Kirstin Moreno

Program: *Ductless Heat Pumps (DHP)*

Project Stage: *REPORTING*

Description	*NEEA actively worked to accelerate adoption of DHPs in the Northwest from 2008 to 2020. Once NEEA scales back investments in a Market Transformation program, the organization continues to monitor market diffusion of the energy-efficient product or practice through a series of annual longitudinal evaluations called market diffusion evaluations. This is the third Market Diffusion Evaluation study for the DHP program.* *A key activity of the study was to conduct phone surveys with HVAC installers. The HVAC installer survey sought to understand trends in DHP installations, the types of homes they are being installed in, the percentage of incented installations, total customer cost, and changes in the DHP market.* *Fuel Type: Electric*
Research Objectives	• *Track diffusion of DHPs across the Northwest's residential HVAC market, specifically within the program's three target markets (single family zonal, single family electric forced air, and manufactured homes with electric forced air) to confirm whether market transformation outcomes are being sustained.*
Top Results	*Findings of the third Market Diffusion Evaluation indicate that the residential DHP market is continuing to grow and gain market share over time. The specific results for the Diffusion Indicators and for target markets include:* • *Single-family DHP installations are on the rise, but due to a combination of factors, target market growth has slowed.* • *Total installed costs continue to increase due to labor costs (not equipment costs).* • *The vast majority of HVAC installers in the Northwest (87%) offer DHPs.*
Timing	*The study kicked off in Q4 2024. The final report was published on neea.org in late Q2 2025.*
Third-Party Contractor(s)	*OWL Research Partners*
Link to Report	Ductless Heat Pumps: 2025 Market Diffusion Evaluation #3

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At-a-Glance

Project	Stage
Integrated Systems (HVAC, Lighting, Motors)	
Commercial HVAC Product Group: ERV/HRV Ownership and Maintenance Market Research	Fielding
Advanced Heat Pumps: Market Progress Evaluation Report #1	Fielding
Advanced Heat Pumps & Dual-Fuel Residential HVAC: Installation Contractor Market Research	Fielding
High-Performance HVAC: Market Progress Evaluation Report #1	Reporting
High-Performance HVAC: Gas High Efficiency DOAS Baseline and Key Assumptions Review	Planning
High-Performance HVAC: Gas High Efficiency DOAS Specifier Market Research	Fielding
Efficient RTU: Market Progress Evaluation Report #1	Reporting
LLLC: Market Progress Evaluation Report #3	Reporting
LLLC: Key Assumptions Review	Fielding
Motor-Driven Systems: Industrial Market Research	Planning
XMP – Pumps: Market Progress Evaluation Report #2	Planning
XMP – Pumps: Agricultural Pumps Market Research	Fielding
Efficient Fans: Fan Manufacturer Representative and Specifier Market Research	Fielding
Products (Consumer Products, Water Heating)	
Consumer Products: Dishwashers ENERGY STAR® 7.0 Assessment	Fielding
RPP: Market Progress Evaluation Report #3	Fielding
RPP: Televisions Model Review	Fielding
RPP: High-Performance Clothes Dryers NOB & Key Assumptions Review	Fielding
HPWH: Market Progress Evaluation Report #8	Fielding
Codes, Standards, New Construction	
Codes: Market Progress Evaluation Report #6	Fielding
Codes: NEEA Codes Baseline and Assumptions Review	Reporting
Residential Codes: Oregon Residential Code Compliance Evaluation	Reporting
Standards: Portable AC and Air Compressor Standards Evaluation	Reporting
Commercial Codes: Idaho Commercial New Construction Code Compliance Evaluation	Fielding
Market Diffusion	
DHP: Ductless Heat Pump Market Diffusion Evaluation, Year 3	Reporting

PROJECT STAGE DEFINITIONS

- *PLANNING: MRE projects from inception through proposal selection*
- *FIELDING: MRE projects from kick-off through the completion of field work*
- *REPORTING: MRE projects in the analysis/synthesis stage through report posting*