



Newsletter / March 5, 2026

Q1 2026: Market Research + Evaluation

Introduction

Greetings readers,

I hope you are staying warm and enjoying your favorite winter activities, indoor and outdoor alike!

It's an exciting time for the NEEA Market Research and Evaluation team. We celebrated Senior MRE Scientist Anu Teja's 20-year anniversary with NEEA in December. In addition, new MRE Scientist, Dr. Nithya Bengali joined the team in early January. Nithya is a research and evaluation scientist with a background in mixed-methods research and program evaluation. Before joining NEEA, she led qualitative and mixed-method evaluations in healthcare and public health, translating data into actionable insights that support system-level change. Nithya will serve as the MRE lead for NEEA's Advanced Heat Pump Program and on our residential codes work.

This quarter's newsletter includes links to four recently published reports: Agricultural Pumps Market Research, Fan Manufacturer Representative and Specifier Market Research, Codes Market Progress Evaluation Report (MPER) #6, and the most recent Idaho Commercial Code Compliance Evaluation. Additionally, this newsletter includes details about MPERs that will report Market Transformation progress for six NEEA programs: Advanced Heat Pumps, High-Performance HVAC, Efficient Rooftop Units, Extended Motor Products – Pumps, Retail Product Portfolio, and Heat Pump Water Heaters.

~ Meghan Bean, Manager, Market Research & Evaluation

For Questions:

Meghan Bean, MRE Manager

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PROJECT STAGE DEFINITIONS

MRE projects can develop rapidly, spanning more than one stage in each quarter 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: REPORTING

Description	<p>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.</p> <p>To investigate the real-world experience of owning and caring for ERV/HRVs in commercial HVAC applications, the market research contractor is analyzing six-to-eight field observations of ERV cleaning/maintenance sessions and conducting 12-to-15 in-depth interviews with market actors, such as manufacturer representatives, building owners, facilities managers and service contractors.</p> <p>Fuel Type: Electric (High-Performance HVAC)</p> <p>Fuel Type: Gas (Efficient Rooftop Units)</p>
Research Objectives	<ul style="list-style-type: none">• Gather perspectives on operational considerations for installing, commissioning, cleaning and maintaining ERVs/HRVs.• Investigate what ERV/HRV cleaning and maintenance looks like in real-world applications.
Timing	<p>The project kicked off in Q3 2025 and will conclude in Q1 2026.</p>
Third-Party Contractor	<p>MarketWise Advising, LLC</p>

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #1

Meghan Bean & Nithya Bengali

Program: Advanced Heat Pumps

Project Stage: FIELDING

Description	<p>NEEA is conducting the first Market Progress Evaluation Report (MPER) for the Advanced Heat Pump program. The evaluation contractor is reviewing secondary documents, conducting in-depth interviews with key market actors including manufacturers, market influencers and participants in federal rule-making processes, and analyzing the program progress to date.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• 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 (MPIs) identified by NEEA.
Timing	<p>This work kicked off in Q4 2025 and will conclude in Q3 2026.</p>
Third-Party Contractor	<p>Michaels Energy</p>

Integrated Systems (HVAC, Lighting, Motors)

Installation Contractor Market Research

Anu Teja & Meghan Bean

Program: Advanced Heat Pumps & Dual-Fuel Residential HVAC

Project Stage: REPORTING

<p>Description</p>	<p>NEEA is conducting market research with residential HVAC installation contractors to inform strategy for the active Advanced Heat Pump program and the Dual-Fuel Residential HVAC program, which is currently in Program Development.</p> <p>Fuel Type: Dual-Fuel</p>
<p>Research Objectives</p>	<p>Conduct HVAC installer focus groups to gather in-depth, qualitative information on the following topics:</p> <ul style="list-style-type: none"> • Descriptions of the typical heat pump selection and sales processes, addressing dual-fuel, single-speed and variable-speed configurations, including communication with purchasers/end-users. • Installers' attitudes toward and decision-making regarding 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.
<p>Timing</p>	<p>This work kicked off in Q4 2025 and will conclude in Q2 2026.</p>
<p>Third-Party Contractor</p>	<p>Evergreen Economics</p>

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #2

Kirstin Moreno

Program: High-Performance HVAC

Project Stage: FIELDING

<p>Description</p>	<p>NEEA's High-Performance HVAC program seeks to transform the market for very high efficiency dedicated outside air systems (DOAS) for electrically heated commercial buildings across the Northwest Region. This study is the second evaluation of the program's Market Transformation efforts.</p> <p>The Market Progress Evaluation Report will comprise expert review of educational and marketing materials, surveys with NEEA trainees, HVAC designer interviews, designer surveys, a web scan, web traffic review and document review.</p> <p>Fuel Type: Electric</p>
<p>Research Objectives</p>	<ul style="list-style-type: none"> • Assess Market Transformation progress as measured by program market progress indicators (MPIs). • Facilitate review, both by experts and by potential users, of NEEA's new case studies and curriculum on non-energy/associated benefits of very high efficiency DOAS and assess attendees' learning from upcoming trainings based on these materials. • Characterize the current alternatives to very high efficiency DOAS; <ul style="list-style-type: none"> ○ Determine which systems or solutions compete with very high efficiency DOAS. ○ Explore the design strategies specifiers and designers employ in jurisdictions with more stringent commercial HVAC code requirements. ○ Describe the perceived benefits and drawbacks of very high efficiency DOAS as compared to other options specifiers consider and choose.
<p>Timing</p>	<p>This work kicked off in Q1 2026 and will conclude in Q2 2027.</p>
<p>Third-Party Contractor</p>	<p>NMR Group (partnered with Apex Analytics LLC)</p>
<p>Link to Previous MPER</p>	<p>High-Performance HVAC Market Progress Evaluation Report #1</p>

Integrated Systems (HVAC, Lighting, Motors)

Gas High Efficiency DOAS Baseline and Key Assumptions Review

Kirstin Moreno

Program: High-Performance HVAC

Project Stage: PLANNING

Description	<p>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 NEEA's newly developed Naturally Occurring Baseline for gas high efficiency DOAS and key assumptions for savings rates, market adoption tracking and incremental costs.</p> <p>Fuel Type: Natural Gas</p>
Research Objectives	<ul style="list-style-type: none">• 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	<p>The project will kick off in Q3 2026.</p>
Third-Party Contractor	<p>Cadmus Group</p>

Integrated Systems (HVAC, Lighting, Motors)

Commercial RTU Replacement Lead Time Market Research

Kirstin Moreno

Program: Advanced Performance RTU

Project Stage: FIELDING

<p>Description</p>	<p><i>NEEA will engage a contractor to conduct market research to better understand processes, timelines and other factors relevant to like-for-like and emergency commercial rooftop unit (RTU) replacement, which is the core target market of the Efficient RTU program. Likely participants are commercial HVAC contractors and distributors.</i></p> <p><i>Fuel Type: Natural Gas</i></p>
<p>Research Objectives</p>	<ul style="list-style-type: none"> • <i>Describe typical processes, timelines, frequency and roles involved in RTU replacement for multiple scenarios: near-emergency/temporary RTU replacement and emergency RTU replacement.</i> • <i>Describe typical circumstances, frequency, process, timeline and roles involved when RTU replacements trigger structural review of the building rooftop.</i> • <i>Analyze and outline the decision-making process for replacing gas pack RTUs with either all-electric or dual-fuel heat pump RTUs, including decision points, roles involved, timeline and other considerations including service upgrades and equipment weight.</i> • <i>Describe how RTU market actors navigate code requirements, like-for-like code exceptions and permitting in all replacement scenarios in the real world.</i>
<p>Timing</p>	<p><i>The project will kick off in Q2 2026.</i></p>

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #2

Kirstin Moreno

Program: Efficient Rooftop Units (RTU)

Project Stage: FIELDING

<p>Description</p>	<p>NEEA's Efficient RTU program is actively working to transform the market for efficient RTUs in gas-heated commercial buildings across the Northwest. This study is the second evaluation of the program's Market Transformation efforts.</p> <p>The evaluation contractor will conduct a document review as well as complete surveys and interviews with HVAC contractors and distributors, manufacturer representatives and Efficient RTU adopters.</p> <p>Fuel Type: Natural Gas</p>
<p>Research Objectives</p>	<ul style="list-style-type: none"> • Assess Market Transformation progress as measured by program market progress indicators (MPIs). • Describe the value proposition of efficient RTUs as perceived by those who have adopted the equipment and document their priorities when making HVAC decisions.
<p>Timing</p>	<p>The project will kick off in Q1 2026 and conclude in Q2 2027.</p>
<p>Third-Party Contractor</p>	<p>Apex Analytics, LLC</p>
<p>Link to Previous MPER</p>	<p>Efficient Rooftop Units Market Progress Evaluation Report #1</p>

Integrated Systems (HVAC, Lighting, Motors)

LLLC Key Assumptions Review

Zdanna King

Program: Luminaire Level Lighting Controls (LLLC)

Project Stage: REPORTING

Description	<p>The LLLC program is conducting a third-party assessment of the regional market share represented by NEEA's aggregated LLLC sales and rebate data. This study replicates an earlier analysis that used additional data sources.</p> <p>Fuel Type: Electric</p>
Research Objectives	<p>Review the LLLC program's estimates of market share represented by its aggregated and anonymized sales and rebate data to substantiate and, if necessary, recommend revisions to this key assumption.</p>
Timing	<p>This project kicked off in Q3 2025 and will conclude in Q1 2026.</p>
Third-Party Contractor	<p>Cadmus Group</p>

Integrated Systems (HVAC, Lighting, Motors)

Industrial Market Research

Chris Cardiel

Product Group: Motor-Driven Systems

Project Stage: FIELDING

Description	<p>NEEA is fielding a study of regional industrial market dynamics in the Northwest to develop market insight that will inform programs within the Motor-Driven Systems Product Group (Efficient Fans and Extended Motor Products – Pumps) and NEEA’s assessment of opportunities related to adjustable-speed drives.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Identify and prioritize industrial market barriers to uptake of highly efficient motor-driven equipment, including any similarities or distinctions by product type.• Document industrial market actor roles, motivations and path-to-purchase throughout the specification and selection process for motor-driven equipment, including any similarities or distinctions by product type.• Assess the degree to which and ways in which industrial market actors consider energy efficiency to be a key factor in the selection of motor-driven equipment relative to other criteria.• Document industrial market actor usage of remote monitoring software, particularly as pertaining to rotating equipment.
Timing	<p>This project kicked off in Q1 2026 and will conclude in Q3 2026.</p>
Third-Party Contractor	<p>MarketWise Advising, LLC</p>

Integrated Systems (HVAC, Lighting, Motors)

Market Progress Evaluation Report (MPER) #2

Chris Cardiel

Program: Extended Motor Products (XMP) – Pumps

Project Stage: FIELDING

Description	<p>NEEA's XMP – Pumps program actively engages with manufacturer 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 Northwest.</p> <p>In this second MPER, specific methodologies include a combination of surveys with specifiers, contractors and end-users and in-depth interviews with manufacturers' representatives to support continued tracking of the program's market progress indicators (MPIs) and address formative research objectives.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Build on the results of XMP – Pumps MPER #1 by 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 kicked off in Q3 2025 and will conclude in Q3 2026.
Third-Party Contractor	Apex Analytics, LLC
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: REPORTING

Description	<p>To support ongoing program planning and opportunity assessment for the XMP – Pumps program, NEEA fielded a research study to explore agricultural pump market dynamics across the Northwest.</p> <p>Study methods included a literature review and in-depth interviews with key agricultural professionals (manufacturers and representatives, specifying engineers, contractors and end users).</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• 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 pertaining to regional irrigated agricultural acreage and market actor technology usage.
Timing	<p>The study kicked off in Q4 2024 and concluded in Q4 2025.</p>
Third-Party Contractor	<p>Resource Innovations</p>
Report Link	<p>Agricultural Pump Market Research - Northwest Energy Efficiency Alliance (NEEA)</p>

Integrated Systems (HVAC, Lighting, Motors)

Fan Manufacturer Representative and Specifier Market Research

Chris Cardiel

Program: Efficient Fans

Project Stage: REPORTING

Description	<p>NEEA conducted a market research study to support continued refinement of the Efficient Fans program's design and intervention strategy.</p> <p>Study methods included in-depth interviews with manufacturer representatives and specifying engineers.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Compile a robust list of commercial and industrial stand-alone fan manufacturer representatives and specifying engineers active in the Northwest.• 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 stand-alone fan specification, sales and installation processes as experienced by manufacturer representatives and specifying engineers.• 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	<p>This project kicked off in Q4 2024 and concluded in Q4 2025.</p>
Third-Party Contractor	<p>DNV Energy Insights, Inc.</p>
Report Link	<p>Stand-Alone Fan Manufacturer Representative & Specifier Market Activity Research - Northwest Energy Efficiency Alliance (NEEA)</p>

Integrated Systems (HVAC, Lighting, Motors)

Fan Naturally Occurring Baseline Forecast Review

Chris Cardiel

Program: Efficient Fans

Project Stage: REPORTING

Description	<p>NEEA is conducting a third-party review of its approach to establishing the Naturally Occurring Baseline (NOB) for the stand-alone fans market.</p> <p>Study methods include a review of relevant datasets and secondary materials as well as interviews with NEEA market analysts to understand the rationale underlying baseline assumptions.</p> <p>Fuel Type: Electric</p>
Model Review Questions	<ul style="list-style-type: none">• Is NEEA's approach to calculating and structuring the baseline Fan Efficiency Index (FEI) for fans sold in Idaho, Montana, Oregon, and Washington reasonable, absent its market intervention via the Fans program?• To develop its estimates, NEEA used historical data provided by its manufacturer collaborators alongside the U.S. Department of Energy technical support document and Notice of Proposed Rulemaking developed for fans and blowers in 2023. Are these data sources reasonable, and should NEEA consider using any additional data sources?• Are there any improvements to NEEA's current method for calculating baseline FEI of fans sold in the Northwest that would improve the NOB?
Timing	<p>This project kicked off in Q4 and will conclude in Q1 2026.</p>
Third-Party Contractor	<p>Apex Analytics, LLC</p>

Integrated Systems (HVAC, Lighting, Motors)

Dual-Fuel Residential HVAC Market Characterization Study

Anu Teja

Program: Dual-Fuel Residential HVAC

Project Stage: PLANNING

Description	<p>To support its Natural Gas Portfolio, NEEA is preparing to conduct a market characterization study regarding dual-fuel residential systems in specific parts of the region: Washington, Oregon and Northern Idaho. The study is intended to inform a better understanding of the ecosystem that influences dual-fuel adoption from both the supply and demand sides of the market.</p> <p>Fuel Type: Natural Gas</p>
Research Objectives	<ul style="list-style-type: none">• Identify supply chain decision-making criteria and tradeoffs that influence how specifications are made, sold and installed in residential homes.• Gather information regarding limitations to manufacturer, distributor and installer adoption of these systems in their business models.• Understand soon-to-be or recent customers' paths to purchasing dual-fuel systems, including awareness, motivators and information sources
Timing	<p>Contractor selection and kickoff will occur in Q1 2026, and the project will conclude in Q4 2026.</p>

Products (Consumer Products, Water Heating)

Market Progress Evaluation Report (MPER) #3

Zdanna King

Program: Retail Product Portfolio (RPP)

Project Stage: REPORTING

Description	<p>The third RPP Market Progress Evaluation Report (MPER) tracks 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.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• 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 measurement of market progress indicators (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 measured.
Timing	<p>This project kicked off in Q2 2025 and will conclude in Q1 2026.</p>
Third-Party Contractor	<p>Level 7 Market Research</p>
Link to Previous MPER	<p>Retail Product Portfolio Market Progress Evaluation Report #2</p>

Products (Consumer Products, Water Heating)

Televisions Model Review

Zdanna King

Program: Retail Product Portfolio (RPP)

Project Stage: REPORTING

Description	<p><i>NEEA's RPP program uses aggregated and anonymized sales data and market condition insights to create key assumptions necessary for reporting regional energy savings and developing a Naturally Occurring Baseline (NOB) of estimated energy-efficient television market penetration over the next 20 years. Study activities will include a document review and analysis to evaluate NEEA's key assumptions and NOB and identify recommendations.</i></p> <p><i>Fuel Type: Electric</i></p>
Research Objectives	<p><i>Evaluate several key assumptions used to inform NEEA's NOB and savings reporting for Televisions, including:</i></p> <ul style="list-style-type: none"><i>Review NEEA's current assumption that all televisions meeting the 2023 Television Manufacturers' Voluntary Agreement also meet ENERGY STAR® (Version 9.1) specifications for 'standby' mode and make recommendations for improvement, if needed.</i><i>Review NEEA's approach for categorizing energy-efficient televisions represented in sales data and make recommendations, if needed, on how to refine this approach.</i><i>Review NEEA's average wattage estimates and Unit Energy Consumption calculations for televisions and conduct secondary research to make recommendations for revisions, if needed.</i>
Timing	<p><i>The project kicked off in Q4 2025 and will conclude in Q1 2026.</i></p>

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: REPORTING

Description	<p>NEEA is conducting a review of its two Naturally Occurring Baseline (NOB) models for high-performance clothes dryers, leveraging subject matter expertise, primary data collection and literature review.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Review NEEA's NOB for ENERGY STAR (Version 1) clothes dryers and make recommendations, as needed, to revise modeling to account for delays in federal standard revisions.• Conduct secondary research to evaluate NEEA's NOB for heat pump dryers in all-in-one laundry units and assess the viability of using data for stand-alone dryer units to develop the NOB.• Leverage methods used to assess the first two research objectives to explore what NEEA's modeling approach could gain from including dryer bin sizes in its NOBs for clothes dryers and, if appropriate, make recommendations for revising the models to account for bin sizes.
Timing	<p>The project kicked off in Q4 2025 and will conclude in Q1 2026.</p>
Third-Party Contractor	<p>Cadmus Group</p>

Products (Consumer Products, Water Heating)

Market Progress Evaluation Report (MPER) #8

Anu Teja

Program: Heat Pump Water Heaters (HPWH)

Project Stage: REPORTING

Description	<p>The eighth 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. Specific data collection methodologies include quantitative web-enabled surveys of Northwest HPWH purchasers and installers to better understand customer satisfaction and to track awareness and opinions of HPWHs over time.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Review and verify that strategic activities identified in 2024 were conducted.• Track identified market progress indicators (MPIs) focused on measuring a specified set of program outcomes per the program logic model.• Identify the nature and prevalence of contractor callbacks and discern the degree to which the perceived likelihood of callbacks impact recommendations and installation of HPWHs.
Timing	<p>The project kicked off in Q1 2025 and will conclude in Q1 2026.</p>
Third-Party Contractor	<p>NMR Group</p>
Link to Previous MPER	<p>Heat Pump Water Heater Market Progress Evaluation Report #7</p>

Products (Consumer Products, Water Heating)

Heat Pump Water Heater Benefit/Cost Model Analysis

Anu Teja

Program: Heat Pump Water Heaters (HPWH)

Project Stage: REPORTING

Description	<p>NEEA is reviewing several components of the 2025 version of its Heat Pump Water Heater (HPWH) Benefit/Cost Model.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Review the current allocation of unit sales within the new construction and recommend any changes, if needed.• Evaluate whether the current use of RPP data is a sufficient stand-in for unit sales in the retail sector.• Review and describe the counterfactual baseline currently in use to compare realized savings relative to those attributable to federal standards.
Timing	<p>The project kicked off in Q4 2025 and will conclude in late Q1 2026.</p>
Third-Party Contractor	<p>Larson Energy Research</p>

Codes, Standards and New Construction

Activity: Codes

Project Stage: REPORTING

Description	<p>NEEA conducted the sixth MPER for its commercial and residential codes efforts. This study built on and complemented learnings from Codes MPER #5 and included ongoing assessment of NEEA’s progress in the Northwest codes market. Study methods included a review of NEEA program materials, interviews with NEEA Codes team members and code market actors, and surveys of individuals who have completed NEEA-sponsored code trainings.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none"> 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 toward outcomes associated with its code influence activities conducted during code cycles beginning in 2018, with a particular focus on code influence activities beginning in 2023. 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	This project kicked off in Q4 2024 and concluded in Q4 2025.
Third-Party Contractor	NMR Group, Inc.
Report Link	Codes Market Progress Evaluation Report #6 - Northwest Energy Efficiency Alliance (NEEA)
Link to Previous MPER	Codes Market Progress Evaluation Report #5

Codes, Standards and New Construction

Oregon and Washington Residential Code Compliance Evaluations

Meghan Bean & Nithya Bengali

Activity: Residential Codes

Project Stage: FIELDING

Description	<p><i>NEEA is conducting code compliance evaluations to review assumptions underlying its estimation of energy savings resulting from NEEA and its partners' involvement in Oregon and Washington code processes.</i></p> <p><i>The contractor will collect data from a variety sources, including building energy permits and site visits to residential new construction projects.</i></p> <p><i>Fuel Type: Electric</i></p>
Research Objectives	<ul style="list-style-type: none"> • <i>Assess statewide compliance among single-family homes built under the 2023 Oregon Residential Specialty Code (ORSC) and 2021 Washington State Energy Code (WSEC).</i> • <i>Provide statewide findings regarding primary space and water heating fuel.</i> • <i>Provide an analysis of builders' choices regarding heating system and duct installation.</i>
Timing	<p><i>This project will kick off in Q1 2026 and conclude in Q1 2027.</i></p>

Codes, Standards and New Construction

Idaho Commercial New Construction Code Compliance Evaluation

Chris Cardiel

Activity: Commercial Codes

Project Stage: REPORTING

<p>Description</p>	<p>The Idaho Commercial New Construction Code Evaluation (a) evaluated compliance with the amended 2018 International Energy Conservation Code (IECC) in newly constructed commercial buildings, and (b) measured the energy performance of a subset of buildings as compared with the average energy performance of buildings constructed under previous code.</p> <p>The study design and methodology used permit data and building plans to collect construction and compliance information, with virtual or in-person site visits conducted for a subsample of participating buildings to validate the accuracy of permit data.</p> <p>Fuel Type: Dual-Fuel</p>
<p>Research Objectives</p>	<ul style="list-style-type: none"> • Catalog major design and engineering practices by major building type for primary building systems including envelope, mechanical and HVAC systems, lighting and service water heating, as well as the primary fuel type(s) used in each building. • Assess system-level and whole-building compliance of new commercial buildings in Idaho constructed under the 2018 IECC, focusing primarily on each of the individual primary building systems. • Assess the degree to which the methodology selected for use in this study (a) generates reliable information regarding decisions made by builders in seeking compliance with current commercial building code, and (b) is likely to be replicable over time and across states.
<p>Timing</p>	<p>This project kicked off in Q3 2023 and concluded in Q4 2025.</p>
<p>Third-Party Contractor</p>	<p>Opinion Dynamics</p>
<p>Report Link</p>	<p>Idaho 2018 Commercial New Construction Code Compliance Evaluation - Northwest Energy Efficiency Alliance (NEEA)</p>

Market Diffusion

Manufactured Homes Market Diffusion Evaluation #1

Anu Teja

Program: Manufactured Homes

Project Stage: FIELDING

Description	<p>Since 2015, NEEA's Manufactured Homes program has worked to increase the adoption of manufactured homes meeting the Northwest Energy Efficient Manufactured Housing Program™ (NEEM)+ specification.</p> <p>Following the recommendations of the 2022 Transition Market Progress Evaluation Report (T-MPER), NEEA is conducting its second Market Diffusion Evaluation study to track market activities now that the program is no longer directly engaged in the market.</p> <p>Fuel Type: Electric</p>
Research Objectives	<ul style="list-style-type: none">• Determine if manufacturers and retailers offer manufactured homes meeting efficiency specifications that provide whole-home energy savings of at least 10% over a home with market-average efficiency sold in the Northwest.• Track diffusion indicators to determine whether the market share of qualified homes remains steady or increases, at least three manufacturers offer qualified homes, and qualified home sales are geographically distributed across the Northwest.
Timing	<p>This project kicked off in Q4 2025 and will conclude in Q2 2026.</p>
Third-Party Contractor	<p>Apex Analytics, LLC</p>
Link to Previous Diffusion Evaluation	<p>Manufactured Homes Transition Market Progress Evaluation Report</p>

Questions? Contact Us

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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	Reporting
Advanced Heat Pump: Market Progress Evaluation Report #1	Fielding
Advanced Heat Pump & Dual-Fuel Residential HVAC: Installation Contractor Market Research	Reporting
High-Performance HVAC: Market Progress Evaluation Report #2	Fielding
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 #2	Fielding
LLLC: Key Assumptions Review	Reporting
Motor-Driven Systems: Industrial Market Research	Fielding
XMP – Pumps: Market Progress Evaluation Report #2	Fielding
XMP – Pumps: Agricultural Pumps Market Research	Reporting
Efficient Fans: Fan Manufacturer Representative and Specifier Market Research	Reporting
Efficient Fans: Naturally Occurring Baseline Forecast Review	Reporting
Dual-Fuel Residential HVAC Market Characterization Study	Planning
Products (Consumer Products, Water Heating)	
RPP: Market Progress Evaluation Report #3	Reporting
RPP: Televisions Model Review	Reporting
RPP: High-Performance Clothes Dryers NOB & Key Assumptions Review	Reporting
HPWH: Market Progress Evaluation Report #8	Reporting
HPWH: Benefit/Cost Model Analysis	Reporting
Codes, Standards and New Construction	
Codes: Market Progress Evaluation Report #6	Reporting
Residential Codes: Oregon Residential Code Compliance Evaluation	Reporting
Residential Codes: Oregon and Washington Residential Code Compliance Evaluations	Fielding
Commercial Codes: Idaho Commercial New Construction Code Compliance Evaluation	Reporting
Market Diffusion	
Manufactured Homes: Manufactured Homes Market Diffusion Evaluation #1	Fielding

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*