

Market Research & Momentum Savings Team

Quarterly Call | December 17, 2020



Bonneville
POWER ADMINISTRATION







Agenda

- Team staffing update (5 min)
- FY21 Work Plan
 - Big things we're working on (15 min)
 - Project updates (25 min)
- Poll (10 min)

Team Staffing Updates



BONNIE

WATSON

Team Lead

bfwatson@bpa.gov



JOAN

WANG

Project Lead

jjwang@bpa.gov



TIM

BANKROFF

Project Lead

tjbankroff@bpa.gov



FY21 Work Plan

- › Big Things
- › Expert Panel Review
- › Non-Residential Lighting
- › Residential HVAC
- › Commercial HVAC
- › Adjustable Speed Drives



Big Things in 2021

1

**Execute
Research
for End of 7PP**

2

**Support
Long-Term
Planning Efforts**

3

**Communication
Refresh**

4

**Expert
Panel**



Expert Panel Review

What? A group of engaged industry experts who review our analysis, help us solve hard problems, and make our work more rigorous.

Who? Managed by DNV GL, experts in statistics/sampling, market analysis, technology experts, supply chain/market actors.

How? Each market we study has its own panel of experts. Engage through working sessions, and desk review.



Why?

Aligns with Our Core Principles

1

ANALYTICAL INTEGRITY

- Objectively measure the markets
 - Best available data
 - Value feedback to continuously improve
-

2

CREATIVITY & INNOVATION

- Solve new and challenging analytical problems
 - Explore the unknown
 - Ask “why?”
-

3

KNOWLEDGE SEEKING

- Value all forms of knowledge, regardless of savings result
 - Contribute to advancement of the EE industry
-



When?

Triggered by Project Needs



Project Plans

Non-Residential Lighting

- BPA has studied this market since 2013
- Conduct annual distributor sales data analysis and manufacturer interviews
- Spans 3 sectors, 15 applications, 16 technologies
- New application: Indoor Agriculture





Non-Residential Lighting



CBSA 4 +
Application
Updates



Sales Data +
Manufacturer
Interviews



Program
Data



Draft & Final
Model
Results





Residential HVAC

What's the big picture?

- 2019: Built a total market consumption model
- 2020: Continue to analyze annual HVAC sales data
- **2021: Will update the model with latest data**
 - › More data on smart t-stats and insulation
 - › Final Momentum Savings for 7th Plan Action Period





Residential HVAC FY21 Work Plan



2016-2019 distributor sales data



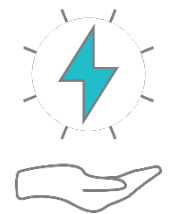
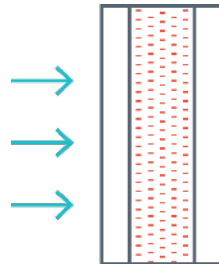
Insulation market study



Smart thermostat market update

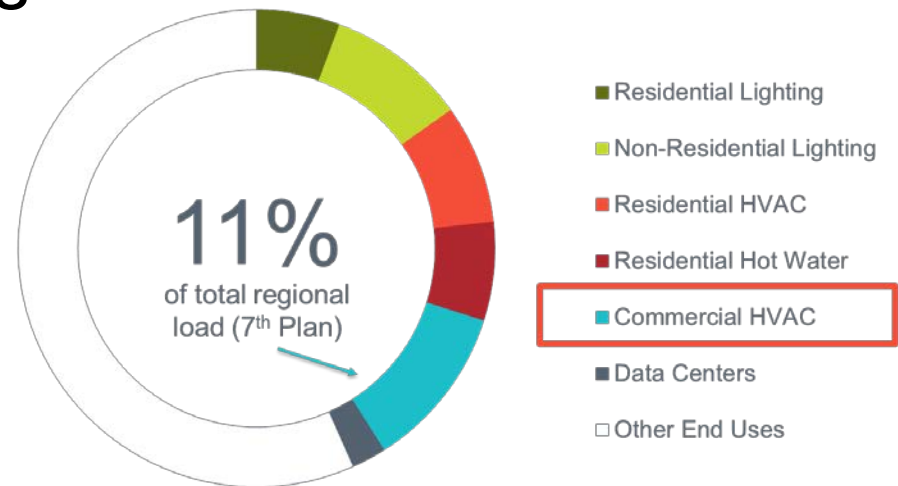


Draft and final model results

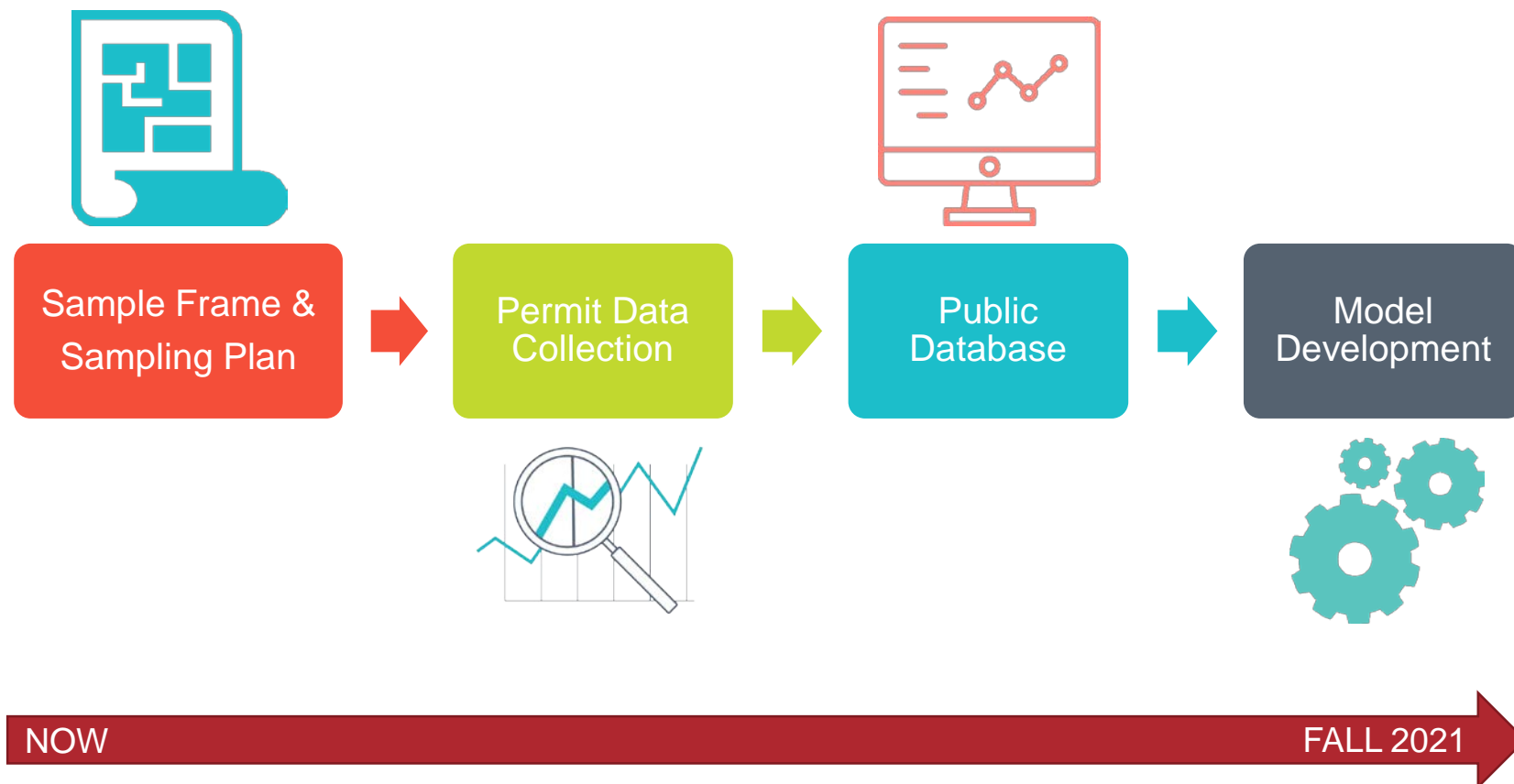


Commercial HVAC

- New market research focus for BPA
- Above-code savings occurring in New Construction & Major Remodel Projects
- VRF, DHP, ASHP & Unitary AC, Heat Recovery



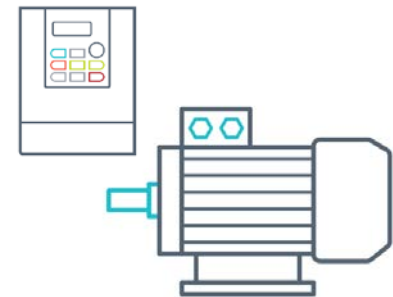
Commercial HVAC



Adjustable Speed Drives

Why study ASDs (VFDs, ECMs, etc.)?

- Motors are a large portion of C&I loads
- Lots of market activity but not well characterized
- Steady program activity and the region is interested in more information
 - › RTF Research Strategy on VFDs
 - › NEEA XMP program and research on fans
- Research will provide regional value





ASD FY21 Work Plan



Existing data scan



Market actor interviews



Model scope & methodology



Data collection & model development



NOW

SPRING 2022



We want to hear from YOU!

Brief Feedback Survey:
Complete by **January 15th**

<https://forms.gle/err1K88CqG5qsSpV6>

See you on February 3rd, 2021

MomentumSavings@bpa.gov



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