



What's Next?

Upcoming Market Research at Bonneville

The Market Research Quarterly Call on May 6 is canceled due to overlapping schedules with the 2026 Efficiency Exchange. In lieu of the call, the Market Research and Momentum Savings team highlights two research projects that have recently kicked off below. Stay tuned for more research updates at the next [Quarterly Call](#) on Aug. 5.

Residential HVAC: Installer Survey Collaboration with Evaluation Team

Bonneville Power Administration's (BPA) Evaluation team continues its suite of research on heat pumps with an HVAC installer survey this Summer. The Market Research team will collaborate on this survey effort that aims to reach more than 100 installers across the Northwest states and gather data on recent residential HVAC installation trends and common heat pump configurations and installation practices. Findings from the installer survey will inform BPA's residential HVAC program offerings, heat pump energy savings, and Momentum Savings.

A key objective of the survey is to determine the distribution of primary heating and cooling installations by HVAC technology and residential building type. In addition to categorizing installations into broad HVAC

technology types such as centrally ducted air-source heat pumps, variable-speed heat pumps, ductless heat pumps, central air conditioners and gas forced-air furnaces, the survey aims to dig deeper into different heat pump system configurations such as hybrid (combining ducted and ductless), dual-fuel (combining electric heat pumps with gas furnaces), and more. The survey will also explore HVAC equipment early replacement rates and heat pump installation practices around supplemental backup heat.

This survey effort is part of a broader heat pump research suite being conducted by Bonneville's Evaluation team, along with the in-progress [Variable Speed Heat Pump \(VSHP\) Deep Dive Research](#). Findings from the installer survey will be available in early 2027.





Adjustable Speed Drives: Apollo, Reveal to Me the ASD Saturation Rates!

BPA's Market Research team is launching a Delphi Panel to gather Adjustable Speed Drive (ASD) market data in the industrial sector for fans and pumps, with the goal of reducing model uncertainty in the ASD saturation estimates. Named after the Oracle at Delphi of ancient Greece where people received prophecies from the god Apollo, a Delphi Panel is a qualitative research technique where a group of experts provide structured feedback anonymously over several rounds until a consensus emerges. BPA's research aims to engage a diverse group of up to 25 market actors—

from manufacturers and distributors to specifying engineers—to validate and refine Bonneville's current estimates for ASD stock saturation and annual ASD market size in the Northwest. These findings improve the region's understanding of the ASD market and BPA's quantification of Momentum Savings from ASDs for the 2022-2027 Energy Conservation Action Plan Period.

Market actor recruitment for the Delphi Panel will kick off this Spring, with the goal of finalizing results by December 2026.

