

August 2025 Quarterly Call

Aug. 13, 2025

Momentum Savings & Market Research



**Org Name +
Answer This Question:**

***What's your favorite ice
cream shop or brand?***



Agenda

- **Team Updates**
- **Expert Panels**
 - Expert Panel Purpose & Process
 - Highlighted Activities
 - Residential Heating, Ventilation, and Air Conditioning (HVAC)
 - Adjustable Speed Drives (ASDs)
 - Nonresidential Lighting
 - Commercial HVAC
- **Wrap Up**

Team Updates

- Commercial HVAC market research paused due to staff shortage.

Market Research Team



Joan Wang
Market Research
Team Lead



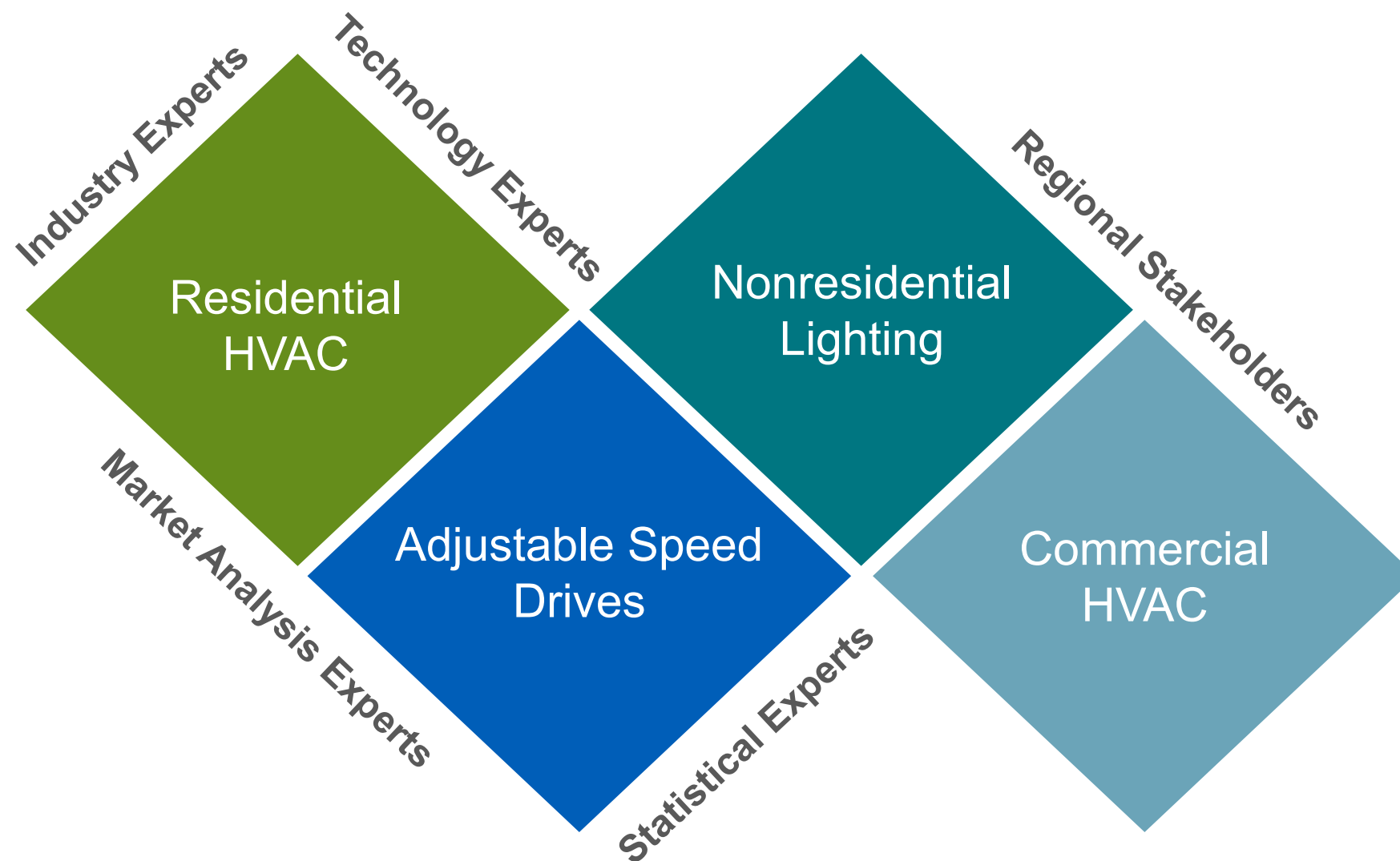
Masumi Izawa
Market Research
Project Manager

VACANT
Market
Research
Project
Manager

The background of the slide features a scenic landscape. On the left, there is a body of water reflecting the sky and surrounding vegetation. In the foreground, tall, thin reeds or grasses are visible, some in sharp focus and others blurred. In the background, a range of mountains is visible under a clear sky. The right side of the slide is a solid dark blue color.

Expert Panel Purpose & Process

Four Markets, Four Expert Panels



Purpose of Expert Panels

1

Independent **expertise and experience** to advise on research and modeling.

2

Near **real-time review** to recommend creative and actionable improvements

3

Continuous, transparent **engagement** with stakeholders.

When Is Panel Needed?

Expert Panel Engagement Process

Methodological
Decisions

Troubleshooting

Results
Reasonableness



Coordinate a working session or desk review with appropriate panelists.



Collect and share panelist feedback for transparency.



Deliberate on panelist feedback.



Inform panelists on decisions and outcomes.



Expert Panel Activity Highlights by Market



Residential HVAC Activities

- **Methodological Decisions**

- How to use different data to inform new construction HVAC saturations.
- Analysis of Residential Building Stock Assessment (RBSA) equipment and efficiency saturations.
- Building shell model inputs and RBSA insulation data analysis.

- **Troubleshooting**

- Filling gaps in RBSA's air-source heat pump heating seasonal performance factors (HSPF).

- **Results Reasonableness**

- Single-family HVAC stock saturations and product flow forecast.
- Interim market model consumption and savings forecast.



Adjustable Speed Drives Activities

- **Methodological Decisions**

- Program savings accounting and forecast assumptions
- Analysis of metered data for load factors impacting unit energy consumption (UEC).

- **Troubleshooting**

- Challenges and strategies to overcome distributor sales data collection.

- **Results Reasonableness**

- Forecasts for motor horsepower stock and ASD saturation.
- Interim market model consumption and savings forecast.



Nonresidential Lighting Activities

● Methodological Decisions

- Methodology to allocate sales data to the stock.
- Investigate alternative sales data extrapolation methodologies.

● Troubleshooting

- Improve lighting technical specification estimates such as hours of use.
- Insights in support of excluding controls in the model; potential strategies to overcome barriers to modeling controls.

● Results Reasonableness

- Forecasts of lighting technology mix by application by year.
- Interim market model consumption and savings forecast.



Commercial HVAC Activities

- **Methodological Decisions**

- Confirm use of permit data to reflect HVAC equipment saturations in new construction and major remodel buildings.
- Review evaluation of data availability to include controls in the model.

- **Troubleshooting**

- Improvements to weather data and other assumptions used in building simulations.

- **Results Reasonableness**

- Interim market model consumption and savings forecast.
- Confirm opportunities to capture additional savings with adding more technologies and expanding the model scope.



Wrap Up

Scoop Up All Four Expert Panel Summaries

Residential HVAC Swirl

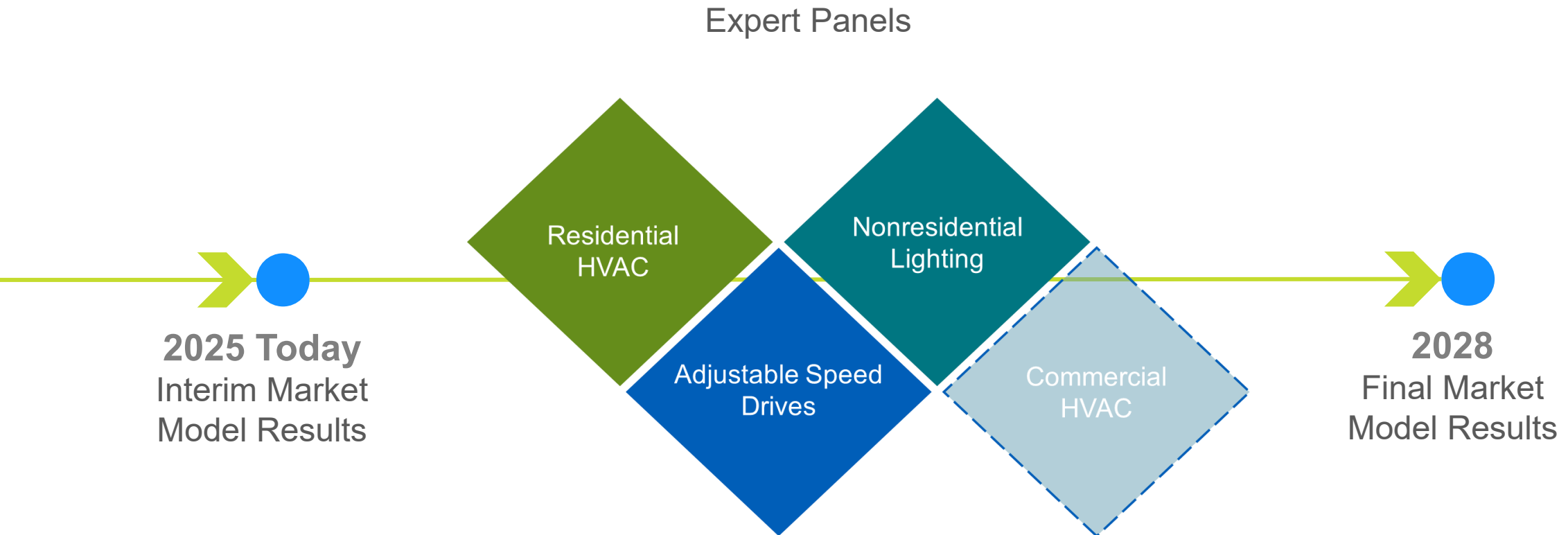
Adjustable Speed Drives Sorbetto

Nonresidential Lighting Creamsicle

Commercial HVAC Matcha



Expert Panels & Big Picture Timeline



Thank You for Attending

See you Nov. 5 at the next quarterly call

Contact

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<https://www.bpa.gov/energy-and-services/efficiency/market-research-and-momentum-savings>

