WHAT TO KNOW ABOUT HEAT PUMP MARKET TRANSFORMATION

Energy Savings Potential (kWh Billions)

180

300

Essentials

- Understand Stakeholders
- Data-Driven Strategies
- Market-driven Intervention

Incentive Strategies

- Lower price to Customer
- Change stocking strategies
- Change sales strategies
- Change components

$\rangle\rangle\rangle$

Top Drivers

- Financial
 Savings
- Investment in Homes
- Environmental Impact

Top Barriers

- Upfront cost
- Aesthetics
- System Operation Concerns

2025

662

d Strategies

Sales Rep

Distributor/Whole

saler/Retailer

Installer

Customer

Often Overlooked Strategies

- Contractor Business Case
- Technology Specific Interventions
- Segment Specific Marketing

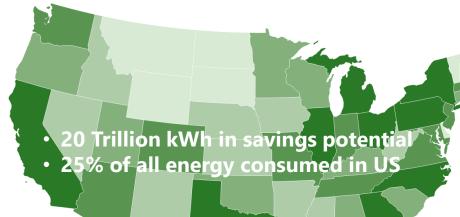
Midstream

Downstream

 Differing Strategies for Early vs. Late Adopters

Energy Efficiency Landscape

- Proven record of financial and energy savings
- Utilities and States shifting focus to Green house gas reduction
- Heat Pumps offer that greatest savings potential to of any energy efficiency measure





Successful strategies have multiple intervention levels

Heat Pump Growth(%)

2019

2011

2012

2013

2014

2015

2016

2017

2018

69

For information:

H1-903-265-9652

Map data: based on DoE savings estimates and EIA energy usage data

Sources: https://www.iea.org/reports/heat-pumps