

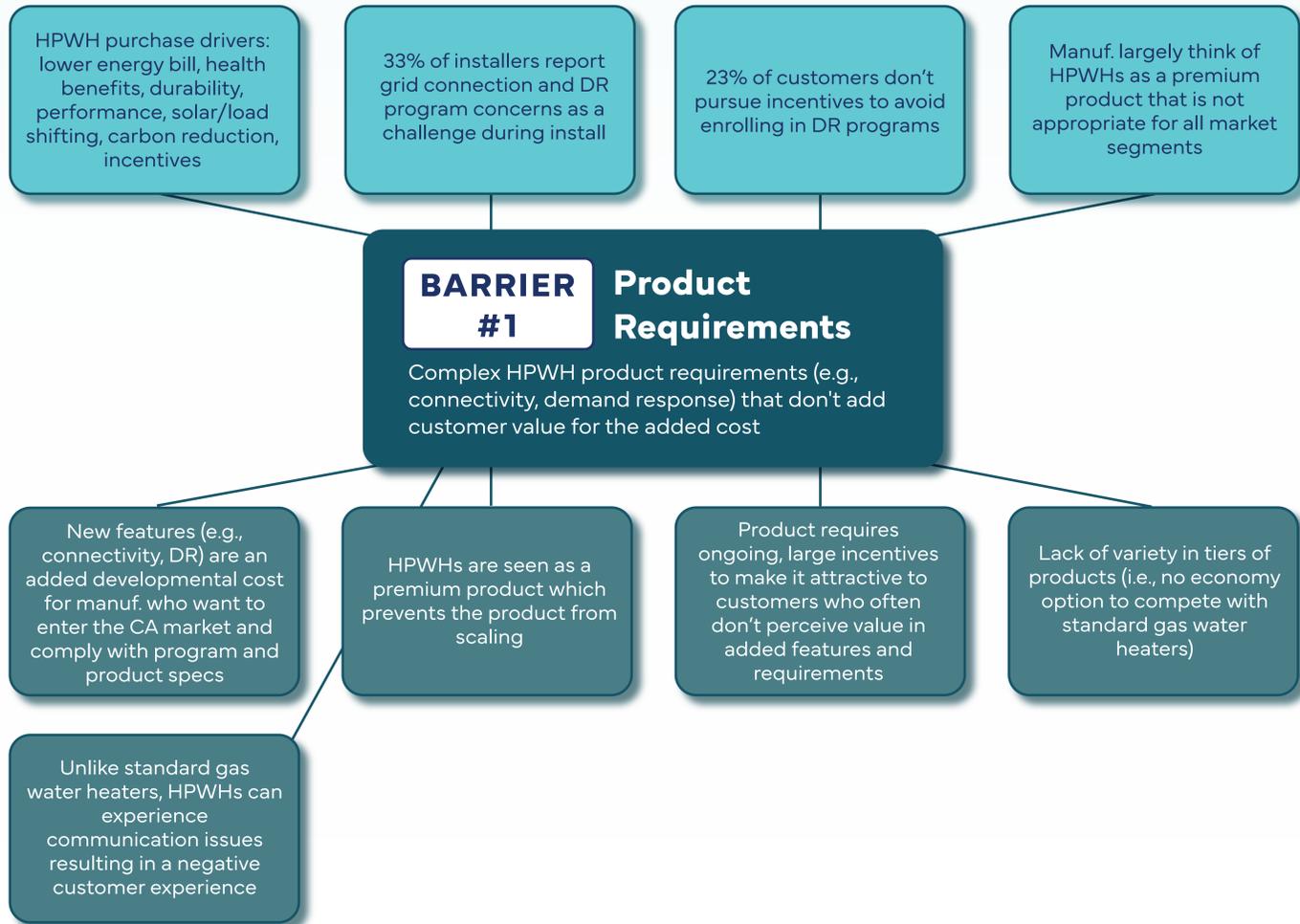
HEAT PUMP WATER HEATERS

Market Barriers and Impacts to Transforming the California Market



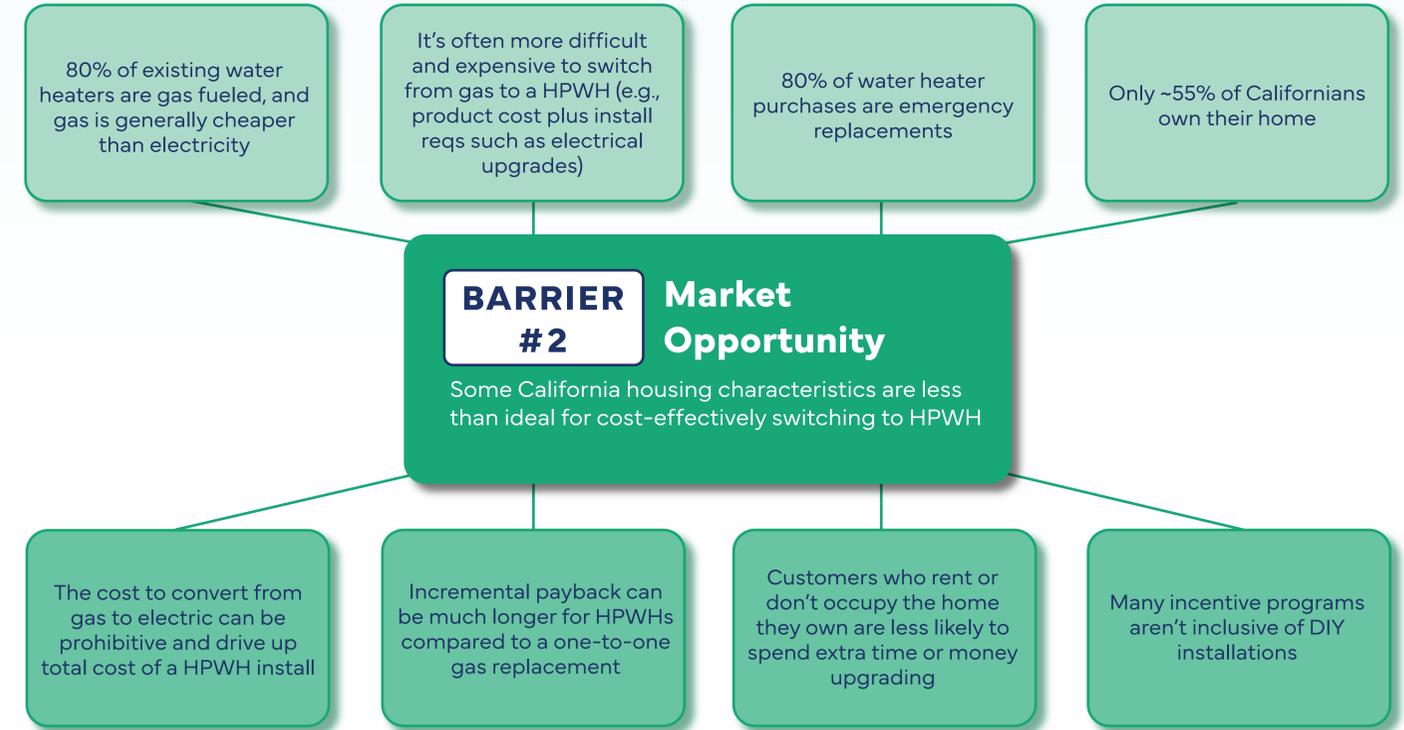
Leveraging existing and new market research, CalMTA identified barriers and market impacts impeding the adoption of HPWHs. Explore these findings, add your own ideas with sticky notes, and use this info to help inspire creative solutions throughout the summit.

RESEARCH FINDINGS



MARKET IMPACTS

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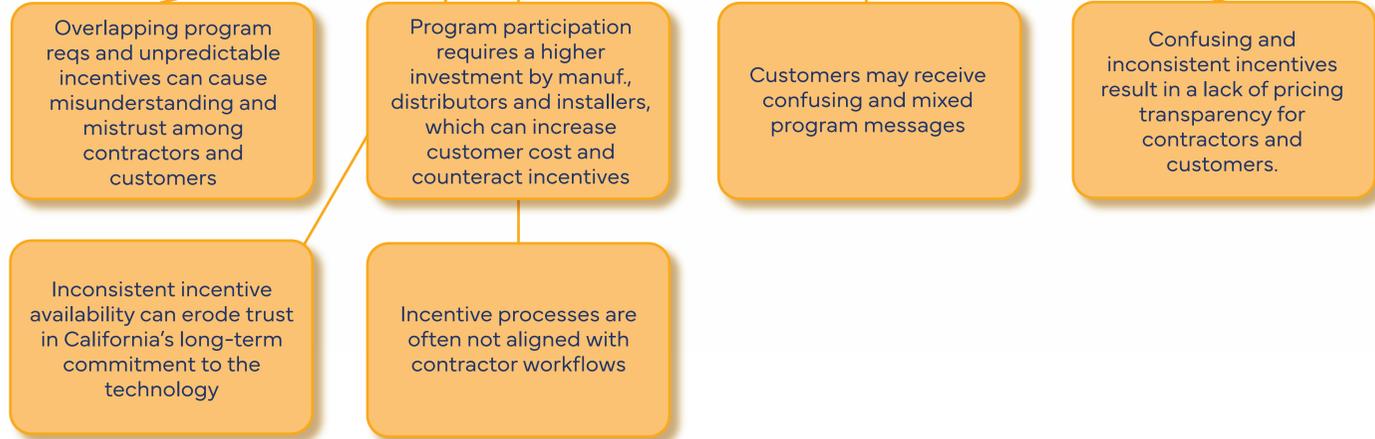


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RESEARCH FINDINGS



BARRIER #3 Program Landscape
 There are multiple programs per territory with disparate participation requirements and incentives



MARKET IMPACTS

RESEARCH FINDINGS



BARRIER #4 Supply and Demand
 Low customer value and demand results in supply chain inertia and lack of install experience



MARKET IMPACTS

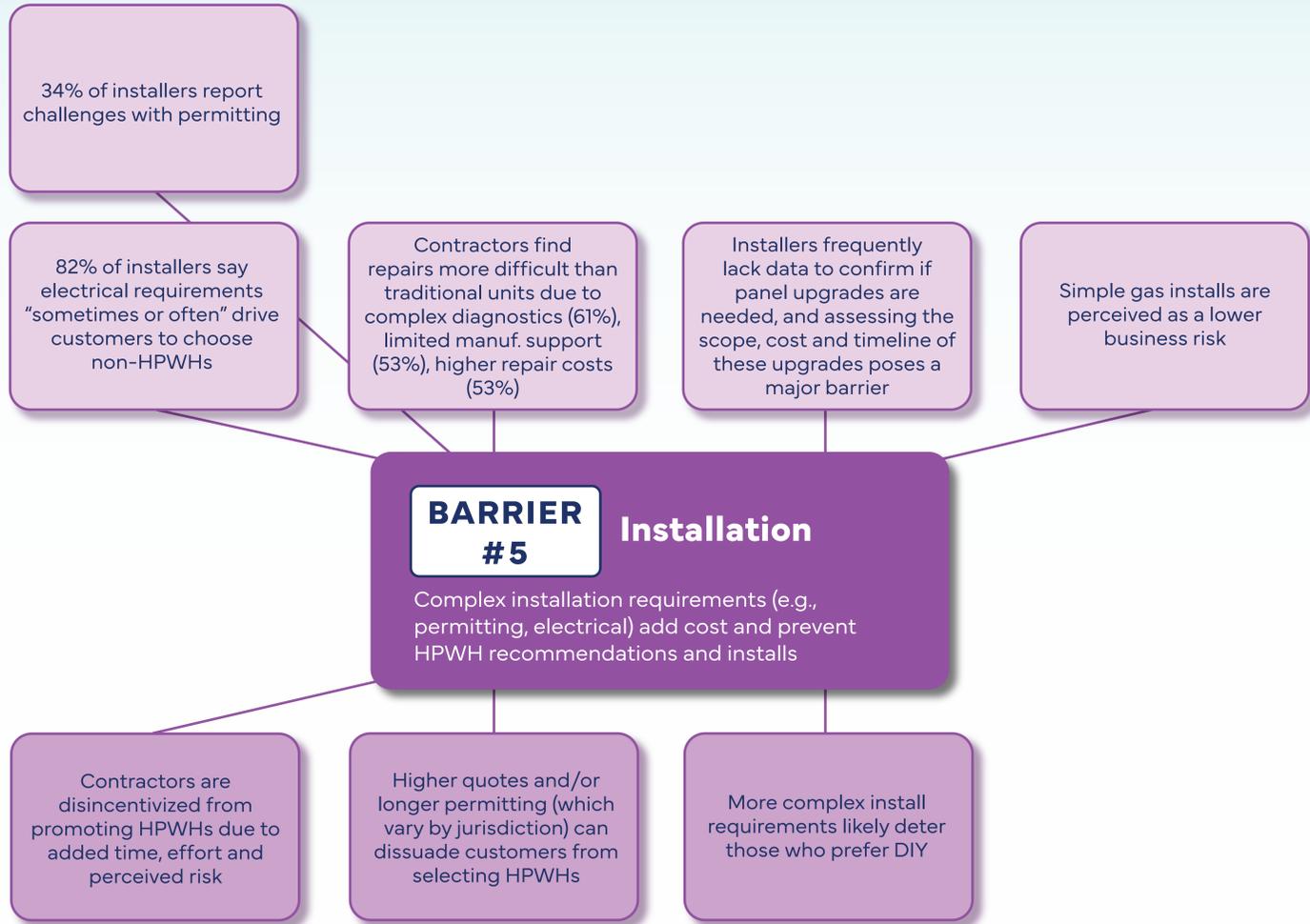
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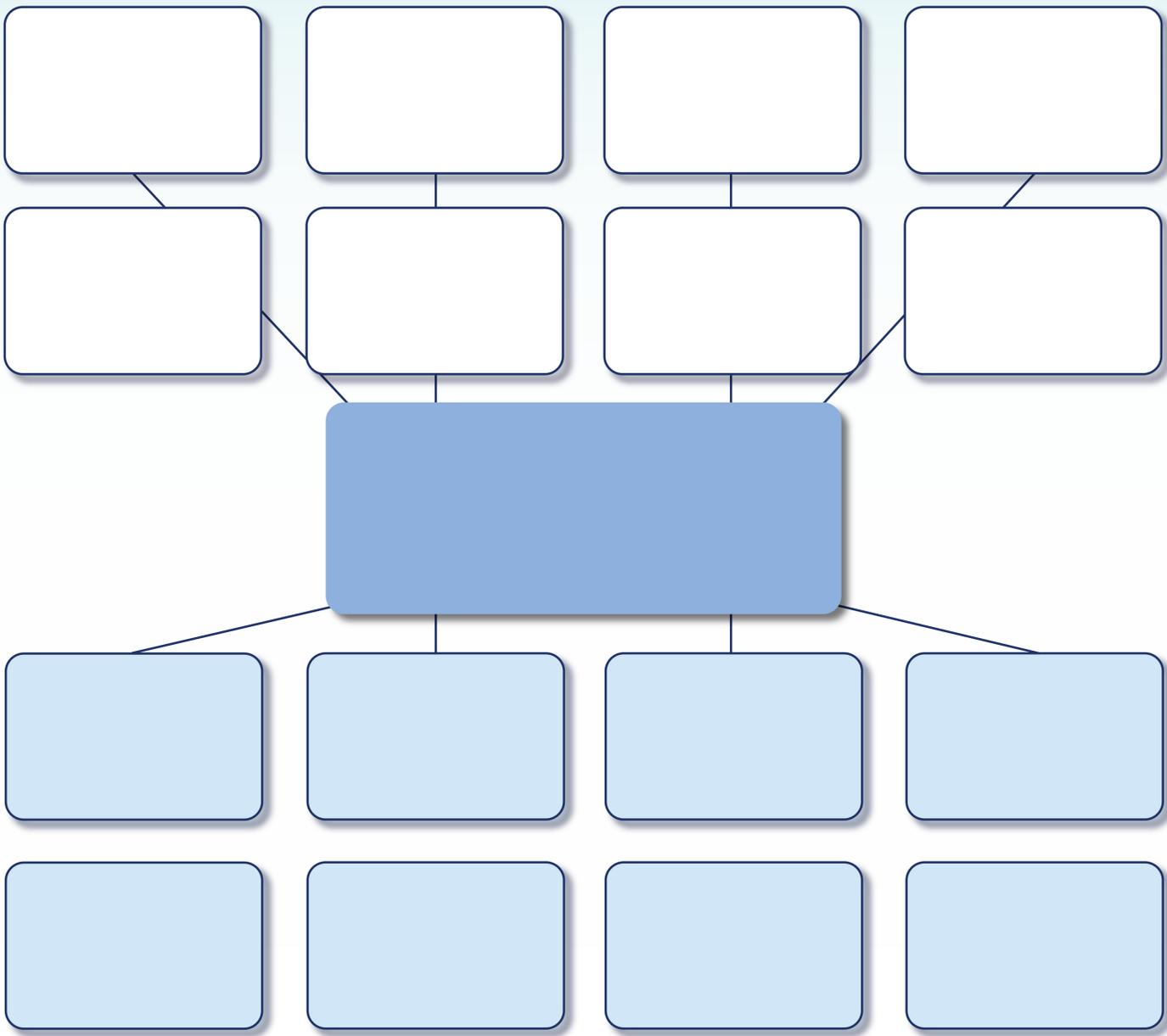
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