HEAT PUMP WATER HEATERS

Market Barriers and Impacts to Transforming the California Market



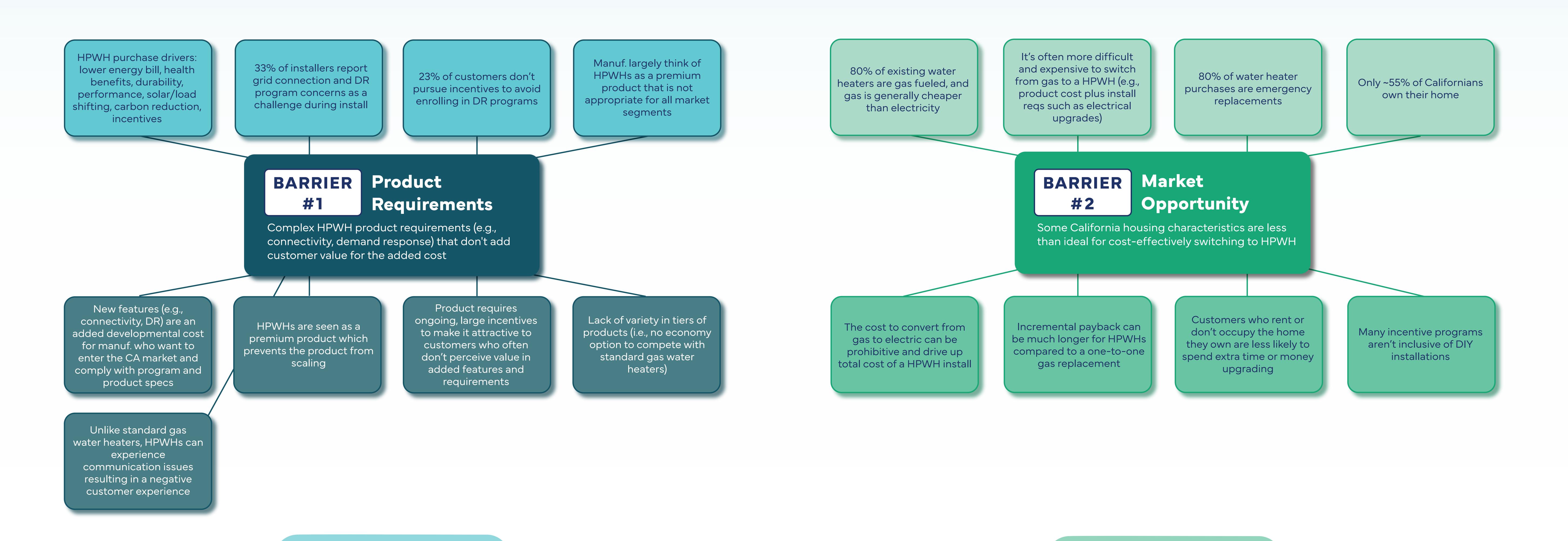
Leveraging existing and new market research, CalMTA identified barriers and market impacts impeding the adoption of HPWHs. Explore these findings, add your own ideas with sticky notes, and use this info to help inspire creative solutions throughout the summit.

RESEARCH FINDINGS

MARKET IMPACTS

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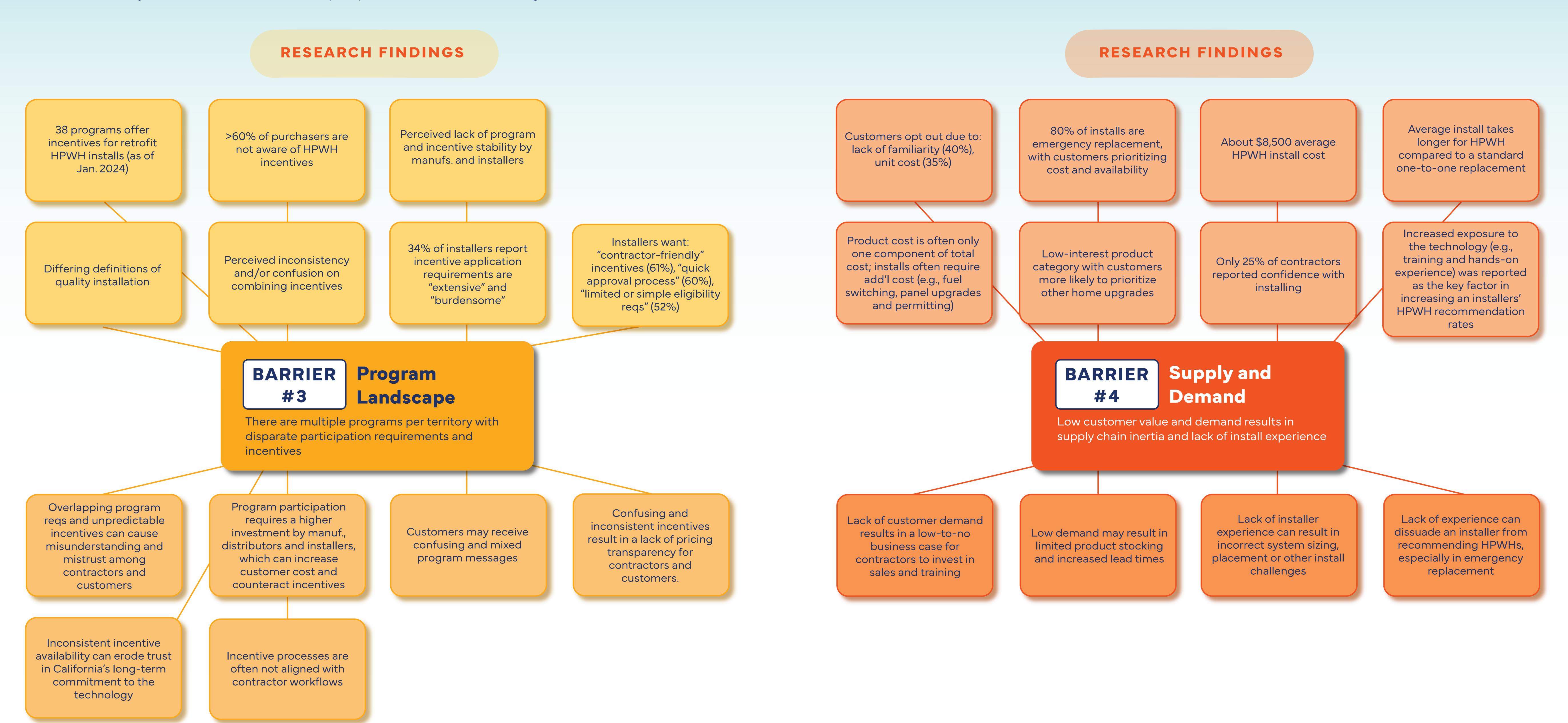


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RESEARCH FINDINGS 34% of installers report challenges with permitting Installers frequently Contractors find 82% of installers say repairs more difficult than lack data to confirm if electrical requirements Simple gas installs are traditional units due to panel upgrades are "sometimes or often" drive perceived as a lower complex diagnostics (61%), needed, and assessing the business risk customers to choose scope, cost and timeline of limited manuf. support non-HPWHs (53%), higher repair costs these upgrades poses a major barrier (53%) BARRIER Installation #5 Complex installation requirements (e.g., permitting, electrical) add cost and prevent HPWH recommendations and installs Higher quotes and/or Contractors are longer permitting (which More complex install disincentivized from requirements likely deter vary by jurisdiction) can promoting HPWHs due to those who prefer DIY dissuade customers from added time, effort and selecting HPWHs perceived risk

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