HVAC Market Actor Profile

by EcoMetric

The primary objective of this research was to gather in-depth data on the **motivations** and **barriers** that drive the decisions of individual HVAC installers working in residential and smaller commercial buildings.

Methodology



1 Literature Review

Existing Market Research Reports
HVAC Industry Websites



2 Data Collection

Market Actor List Development and Sampling
Online Focus Groups
In-depth Interviews
Ride-Alongs

Key Findings

Market Actor Characteristics

Architectural and Engineering Firms

25% of projects are in small-to-medium commercial buildings



Sources of Satisfaction
Sustainability goals
Solving problems



Information Sources
Seminars
ASHRAE

HVAC Contractors



Information Sources
HVAC suppliers
HVAC vendors



Primary Motivators
Customer satisfaction
Solving problems

HVAC Project Decision-Making



Design/build projects require that contractors have the broadest capabilities.

HVAC contractors described **three** broad considerations in designing systems that are part of design/build projects:

- Physical characteristics of space
- Use of space
- Customer budgets



Two key factors that increase the likelihood a project will include efficient equipment:

- Owner-occupied facilities
- Publicly-owned or subsidized buildings

Business Considerations

Profitability & Business Metrics

Competing to offer the lowest prices not sustainable
Building strong relationships
Maintaining positive professional reputations

Employee Recruiting & Retention

Difficulty in finding skilled workers
Preference on hiring skilled staff



Recommendations

Develop case studies showcasing the energy and non-energy benefits to customers of efficient technologies.



Incentivize early replacement of RTUs. Code minimum units are often used in replacelemnt on failure projects.



Recognize that there may be limitations to the midstream approach, especially in plan and specify projects where contractors have little opporunity to suggest changes in specifications.

Move rebates for high-efficiency RTUs **upstream**.



Recognize potential **technology** and **cross-selling** opportunities.