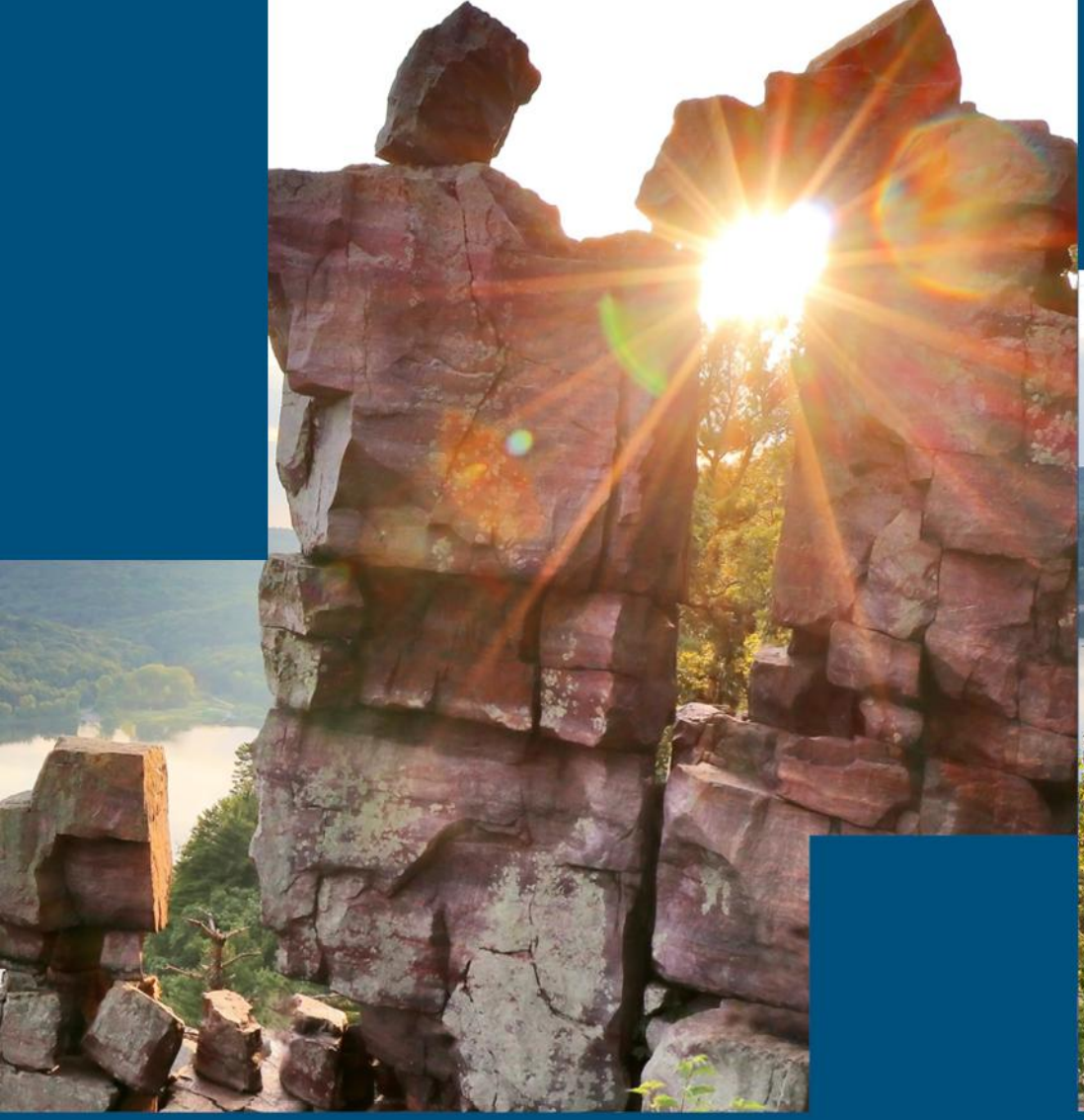


FOCUS ON ENERGY®
Calendar Year 2025
Evaluation Report

Volume 1

May 15, 2026

CADMUS

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Acronyms

Acronym	Term
AVERT	AVoided Emissions and geneRation Tool
CY	Calendar year
DHW	Domestic hot water
EDA/EDR	Energy Design Assistance/Energy Design Review
EPA	Environmental Protection Agency
FAQ	Frequently Asked Questions
HVAC	Heating, ventilation, and air conditioning
KPI	Key performance indicator
kW	Kilowatt
kWh	Kilowatt hour
LED	Light-emitting diode
MMBtu	Million British thermal units
NPS	Net promoter score
NTG	Net-to-gross
PSC	Public Service Commission of Wisconsin
PV	Photovoltaic
SCT	Societal Cost Test
SPECTRUM	Statewide Program for Energy Customer Tracking, Resource Utilization, and Data Management
T&D	Transmission and distribution
TRC	Total resource cost test
TRM	Technical reference manual
UAT	Utility Administrator Cost Test
VSD	Variable-speed drive

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Executive Summary

This report, presented in three volumes, describes the evaluation findings and impacts achieved by Focus on Energy for calendar year (CY) 2025. When appropriate, each volume includes previous evaluation results alongside CY 2024 results for comparison.

- Volume I (this report) is a summary of findings across all programs, offerings, and measure categories in the portfolio.
- Volume II includes detailed findings for each Focus on Energy program and offering.
- Volume III includes the appendices with additional details on the evaluation methodologies as well as supporting data and evaluation materials.

The Wisconsin Focus on Energy Evaluation Dashboard is another tool that allows users to review energy savings by year, customer sector, and measure category.[1]

All four resources (Volume I, Volume II, Volume III, and the online Evaluation Dashboard) should be read together to gain a comprehensive perspective of the Focus on Energy portfolio.

SUMMARY OF METHODS

Each year, the evaluation team produces results for three consistent evaluation research areas—impact analysis, customer satisfaction, and cost-effectiveness—in addition to more targeted research that varies annually and is designed to meet Focus on Energy's specific program evaluation needs.[2] In Quadrennium IV, the evaluation team also reports on the achievement of key performance indicators (KPIs) outlined in the program administrator's contract, as well as evaluation activities related to the Public Service Commission of Wisconsin (PSC) priorities for Quadrennium IV. The five ongoing research areas of the evaluation are briefly described below. Specific annual program-related evaluation efforts are described in the program chapters of Volume II.

Impact Analysis

The following key terms are briefly defined here and further detailed in *Appendix B. Glossary of Terms in Volume III*:

- **Gross savings:** Program-reported change in energy consumption, demand, or both resulting from an efficiency offering.
- **Verified gross savings:** Energy savings or impact verified by the independent evaluation team.
- **Net savings:** Savings directly attributable to offering efforts (net of what would have occurred in the absence of the offering).

[1]The Wisconsin Focus on Energy Evaluation Dashboard tool is available here: ***https://focusonenergy.com/evaluation-dashboard***

[2]The independent evaluation team comprises Cadmus and Apex Analytics.

To determine verified gross savings, the evaluation team reviewed and assessed the technical assumptions used by Focus on Energy to calculate savings and participation levels, and to measure installation and retention rates. To determine net savings, the evaluation team conducted primary research in CY 2025 and applied evaluation results from previous years.

In CY 2025, Focus on Energy and the evaluation team began calculating winter demand (kW) impacts to address the Commission's Quadrennium IV priority to adopt a winter peak electric period definition and begin quantifying and tracking the winter electric peak demand reductions achieved by the program.

Customer Satisfaction

To monitor participants' satisfaction with Focus on Energy and its programs, the evaluation team analyzed ongoing participant surveys that the administrator distributed to all CY 2025 participants with contact information. The team reported on various satisfaction topics, including overall satisfaction with the program and Focus on Energy as a whole, as well as a net promoter score. These analyses are further described in specific program chapters of Volume II.

Cost-Effectiveness

The evaluation team used an approved cost-effectiveness calculator to determine the cost-effectiveness of individual programs and offerings, as well as of the entire Focus on Energy portfolio. Volume I includes the results for the primary test: the modified total resource cost (TRC) test. The PSC also requires the use of three secondary tests for informational purposes. Results of all four tests conducted as part of Focus on Energy's evaluation—including the modified TRC—are provided in *Appendix J. Cost-Effectiveness and Emissions Methodology and Analysis in Volume III*.

Key Performance Indicators

The evaluation team reviewed tracking data and verified savings to assess the achievement of the KPIs outlined in the program administrator's contract.[3] The team collaborated with the program administrator and PSC staff to establish the data sources, processes, and procedures necessary for the evaluation team to assess the achievement of the contractual KPIs. Six KPIs are outlined in the administrator's contract; however, because certain KPIs concern the program's performance at particular points within the quadrennium, the evaluation team will not report on all KPIs each year of the quadrennium. The *Key Performance Indicators Achievement* section of this report presents the CY 2025 KPI verification results.

Quadrennium IV Public Service Commission Priorities

In the Quadrennium IV planning process, the PSC charged Focus on Energy with making measurable progress on various transitional priorities that will prepare the program for a shift in emphasis if the PSC wishes to establish new goals and measurable targets for the program in Quadrennium V. To help address the PSC's priorities, the evaluation team conducted a variety of research and analysis activities that will allow Focus on Energy to improve or expand its savings methodologies and tracking. Progress achieved in CY 2025 around these priorities is presented in *Appendix K. Quadrennium IV Commission Priorities Progress in Volume III*.

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[3] Contractual KPIs are established in Attachment E of the Contract for Services between the Statewide Energy Efficiency and Renewables Administration and APTIM Government Solutions, LLC.

Contract Number 9501-FE-128. PSC REF#: 457108, Attachment E (Key Performance Indicators), amended by Amendment 4, PSC FEF# 457108 ***https://apps.psc.wi.gov/pages/viewdoc.htm?docid=531516***

KEY ACHIEVEMENTS

Table 1 shows Quadrennium IV goals.

Table 1. Focus on Energy Gross Quadrennium IV Goals

UNIT	GOAL
Lifecycle MMBtu	219,775,457
Lifecycle kWh	32,439,668,107
kW Summer	300,983
Lifecycle therms	1,090,913,097

Lifecycle kWh and Lifecycle therm goals reflect full targets; they are not adjusted for the 70% minimum threshold.

Note: Winter kW goals were not established for Quadrennium IV.

Table 2 shows CY 2025 lifecycle reported gross savings, verified gross savings, and verified net savings for residential, nonresidential, and midstream offerings.

Table 2. CY 2025 Lifecycle Savings by Channel

SAVINGS TYPE	UNIT	RESIDENTIAL	NONRESIDENTIAL	MIDSTREAM	TOTAL
Gross	MMBtu	13,100,319	41,356,397	6,727,376	**61,184,092**
	kWh	1,534,371,324	5,579,717,509	-93,496,378	**7,020,592,455**
	kW Summer	13,858	48,130	1,134	**63,123**
	kW Winter	6,678	37,957	-2,104	**42,531**
	Therms	78,650,442	223,184,012	70,463,853	**372,298,307**
Verified Gross	MMBtu	12,576,338	41,251,390	6,866,171	**60,693,900**
	kWh	1,498,902,189	5,579,717,516	-70,859,437	**7,007,760,268**
	kW Summer	15,971	48,098	1,868	**65,937**
	kW Winter	6,805	38,511	-2,014	**43,303**
	therms	74,620,839	222,133,941	71,079,438	**367,834,218**
Verified Net	MMBtu	9,638,971	34,104,416	4,183,929	**47,927,316**
	kWh	919,506,529	4,554,763,325	-37,809,899	**5,436,459,954**
	kW Summer	10,536	39,342	1,106	**50,984**
	kW Winter	4,341	31,849	-1,139	**35,051**
	therms	65,016,144	185,635,636	43,129,363	**293,781,143**

Note: Totals may not match the sum of channel savings due to rounding.

Table 3 lists verified gross lifecycle savings achieved in CY 2023, CY 2024, and CY 2025, as well as Quadrennium IV totals through CY 2025.

Table 3. CY 2023, CY 2024, and CY 2025 Verified Gross Lifecycle Savings by Channel

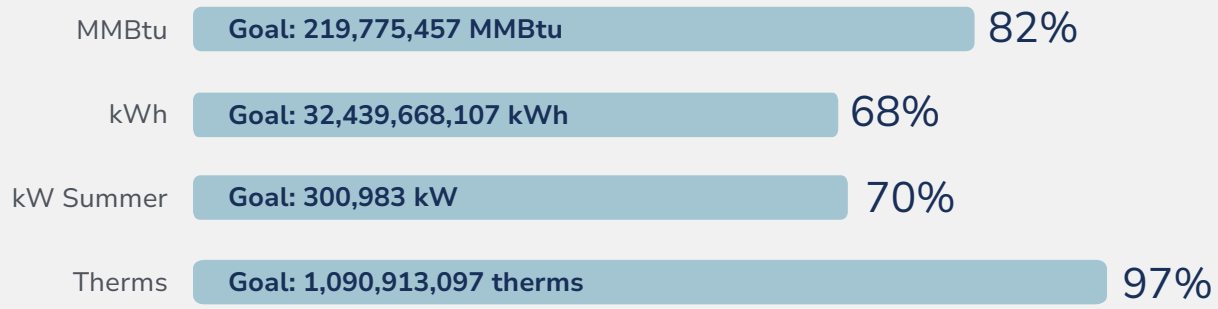
CALENDAR YEAR	UNIT	RESIDENTIAL	NONRESIDENTIAL	MIDSTREAM[a]	TOTAL
CY 2023	MMBtu	14,989,920	45,825,188	3,661,855	**64,476,964**
	kWh	1,226,256,941	6,036,620,993	183,236,319	**7,446,114,252**
	kW Summer	16,974	59,004	2,432	**78,410**
	kW Winter	N/A	N/A	N/A	**N/A**
	therms	108,059,315	252,282,376	30,366,531	**390,708,223**
CY 2024	MMBtu	16,243,821	37,995,610	1,738,779	**55,978,211**
	kWh	1,307,919,009	6,397,784,104	-10,228,812	**7,695,474,300**
	kW Summer	11,293	53,017	631	**64,941**
	kW Winter	N/A	N/A	N/A	**N/A**
	therms	117,812,018	161,663,711	17,736,797	**297,212,526**
CY 2025	MMBtu	12,576,338	41,251,390	6,866,171	**60,693,900**
	kWh	1,498,902,189	5,579,717,516	-70,859,437	**7,007,760,268**
	kW Summer	15,971	48,098	1,868	**65,937**
	kW Winter	6,805	38,511	-2,014	**43,303**
	therms	74,620,839	222,133,941	71,079,438	**367,834,218**
Quad IV Totals	**MMBtu**	**43,810,080**	**125,072,189**	**12,266,806**	**181,149,075**
	kWh	**4,033,078,138**	**18,014,122,612**	**102,148,070**	**22,149,348,820**
	kW Summer	**44,238**	**160,119**	**4,931**	**209,288**
	kW Winter	**6,805**	**38,511**	**-2,014**	**43,303**
	therms	**300,492,172**	**636,080,028**	**119,182,767**	**1,055,754,967**

Note: Totals may not match the sum of channel savings due to rounding.

[a] In CY 2024, the midstream channel transitioned from the Midstream to the Instant Discount Program. The differences in midstream channel savings across years are attributable to the differences in the measures offered by the two programs. For more details, see the Instant Discount Chapter in Volume II of the CY 2024 report.

Figure 1 shows achievement toward the 2023-2026 quadrennium savings goals as of CY 2025. Focus on Energy achieved 82% of the MMBtu savings goal, 68% of the electric energy savings goal, 70% of the overall electric demand reduction goal, and 97% of the natural gas savings goal.

Figure 1. Achievement of Four-Year (CY 2023-CY 2026) Verified Gross Lifecycle Savings Goals



Note: Winter kW goals were not established for Quadrennium IV.

Table 4 lists CY 2025 annual reported gross savings, verified gross savings, and verified net savings for residential, nonresidential, and midstream offerings.

Table 4. CY 2024 First-Year Annual Savings by Channel

SAVINGS TYPE	UNIT	RESIDENTIAL	NONRESIDENTIAL	MIDSTREAM	TOTAL
Gross	MMBtu	742,237	2,588,059	354,795	**3,685,090**
	kWh	70,211,202	346,126,043	-4,660,563	**411,676,682**
	kW Summer	13,858	48,130	1,134	**63,123**
	kW Winter	6,678	37,957	-2,104	**42,531**
	therms	5,026,761	14,070,767	3,706,964	**22,804,492**
Verified Gross	MMBtu	690,593	2,581,155	366,411	**3,638,159**
	kWh	68,086,228	346,126,043	-2,492,010	**411,720,261**
	kW Summer	15,971	48,098	1,868	**65,937**
	kW Winter	6,805	38,511	-2,014	**43,303**
	therms	4,582,828	14,001,730	3,749,138	**22,333,697**
Verified Net	MMBtu	540,349	2,139,969	224,991	**2,905,309**
	kWh	45,792,703	284,092,638	-1,160,629	**328,724,712**
	kW Summer	10,536	39,342	1,106	**50,984**
	kW Winter	4,341	31,849	-1,139	**35,051**
	therms	3,841,039	11,706,452	2,289,510	**17,837,001**

Note: Totals may not match the sum of channel savings due to rounding.

Table 5 lists the annual verified net savings achieved in CY 2023, CY 2024, and CY 2025, as well as quadrennial net savings achieved through CY 2025.

Table 5. CY 2023, 2024, and CY 2025 First-Year Annual Verified Net Savings by Channel

CALENDAR YEAR	UNIT	RESIDENTIAL[a]	NONRESIDENTIAL	MIDSTREAM[b]	TOTAL
CY 2023	MMBtu	625,585	2,404,259	365,435	**3,395,279**
	kWh	42,182,190	290,177,057	31,531,226	**363,890,472**
	kW Summer	9,968	45,168	2,287	**57,423**
	kW Winter	N/A	N/A	N/A	**N/A**
	therms	4,816,595	14,141,745	2,578,507	**21,536,847**
CY 2024	MMBtu	694,117	2,005,446	59,986	**2,759,549**
	kWh	38,967,580	325,897,506	-481,738	**364,383,347**
	kW Summer	6,563	44,130	390	**51,083**
	kW Winter	N/A	N/A	N/A	**N/A**
	therms	5,611,596	8,934,837	616,294	**15,162,726**
CY 2025	MMBtu	540,349	2,139,969	224,991	**2,905,309**
	kWh	45,792,703	284,092,638	-1,160,629	**328,724,712**
	kW Summer	10,536	39,342	1,106	**50,984**
	kW Winter	4,341	31,849	-1,139	**35,051**
	therms	3,841,039	11,706,452	2,289,510	**17,837,001**
QUAD IV TOTALS	**MMBtu**	**1,860,051**	**6,549,674**	**650,412**	**9,060,136**
	kWh	**126,942,472**	**900,167,201**	**29,888,858**	**1,056,998,532**
	kW Summer	**27,066**	**128,640**	**3,783**	**159,490**
	kW Winter	**4,341**	**31,849**	**-1,139**	**35,051**
	therms	**14,269,230**	**34,783,034**	**5,484,311**	**54,536,575**

Note: Totals may not match the sum of residential and nonresidential savings due to rounding.

[a] CY 2023 net residential savings include additional market effect savings that account for the program's long-term effect on the Wisconsin residential new construction and lighting markets. CY 2024 and CY 2025 net residential savings include additional market effects savings for the Residential New Construction Program. Additional details about market effects can be found in the Market Effects for Non-Program Homes section of the Residential New Construction chapter within Volume II. Additional details about CY 2023 lighting market effects can be found in the Upstream Lighting Market Effects section of the Direct to Customer chapter within Volume II of the 2023 report.

[b] In CY 2024, the midstream channel transitioned from the Midstream Program to the Instant Discount Program and HVAC measures that had previously been rebated through Trade Ally Solutions were added to the Instant Discount Program. As a result, many of the heat pump measures that produce negative kWh savings shifted from the Trade Ally Solutions Program to the Instant Discount Program. For more details, see the Instant Discount chapter in Volume II of the CY 2025 report.

The administrator has a goal to ensure that the portfolio passes a benefit/cost analysis, specifically the modified TRC test. Table 6 lists findings from the evaluation team's benefit/cost analysis of the CY 2025 portfolio. The residential and nonresidential channels and overall portfolio were cost-effective.

Table 6. CY 2025 Cost-Effectiveness Results

FOCUS ON ENERGY BENEFITS AND COSTS	FULL PORTFOLIO	CORE PROGRAMS ALONE	RENEWABLES ALONE
Incentives	$58,118,053	$55,330,932	$2,787,121
Modified TRC Benefits ($ millions)	$705,244,292	$597,483,010	$107,761,281
Modified TRC Costs ($ millions)	$295,794,156	$211,616,557	$84,177,599
Portfolio Modified TRC Ratio	2.38	2.82	1.28

2. Introduction

Focus on Energy, Wisconsin's statewide energy efficiency and renewable resource program, is funded by the state's investor-owned energy utilities—as required under Wisconsin Statute §196.374(2)(a)—and by participating municipal and electric cooperative utilities. The PSC provides oversight of Focus on Energy.

Focus on Energy works with eligible Wisconsin residents and businesses to complete cost-effective energy efficiency and renewable energy projects. Information, resources, and financial incentives enable consumers to carry out energy projects they otherwise would not have been able to pursue or complete ahead of schedule. Focus on Energy helps Wisconsin residents and businesses manage rising energy costs, promotes in-state economic development, protects the environment, and helps manage Wisconsin's demand for electricity and natural gas.

The state's investor-owned utilities, with PSC approval, contracted with APTIM to administer Focus on Energy in the CY 2023-2026 quadrennium. The administrator, in collaboration with the implementers, is responsible for designing all Focus on Energy programs and ensuring their overall performance meets Wisconsin's energy-savings goals. The administrator is also responsible for managing and coordinating individual offerings, supporting customers and trade allies through a customer service center, coordinating with participating utilities, guiding marketing and communication activities, and reporting to the Statewide Energy Efficiency and Renewables Administration and the PSC.

The Statewide Energy Efficiency and Renewables Administration, formed by the state's investor-owned utilities, is responsible for collecting utility funding for Focus on Energy and contracting with the administrator.

In CY 2025, Focus on Energy maintained three separate program delivery channels:

- The **residential channel** serves single-family, multifamily units, and multifamily buildings.
- The **nonresidential channel** serves commercial, industrial, school, government, and agribusiness customers.
- The **midstream channel** serves residential and nonresidential customers via distributors of eligible equipment.

2.1. CY 2025 Evaluation

The evaluation team investigated the performance of 11 programs and 23 offerings that delivered energy savings during CY 2025.[4] Table 7 lists the programs and offerings evaluated in the residential and nonresidential sectors in CY 2025.

Table 7. CY 2025 Residential and Nonresidential Programs and Offerings

Channel	Program	Offering
Residential	Direct to Customer	Online Marketplace Packs Income Qualified Direct Install Pilot
	Multifamily	Multifamily Energy Design Assistance/Energy Design Review
	Renewable Rewards	Residential Renewable Rewards Department of Administration Solar/Heat Pump Pilot
	Residential New Construction	Residential New Construction New Manufactured Homes Pilot
	Trade Ally Solutions	Heating and Cooling Insulation and Air Sealing Retail Smart Thermostats Tribal
	Pilots	Accessible Efficiency
Nonresidential	Agribusiness	Agribusiness
	Business and Industry	Commercial and Industrial Energy Design Assistance/Energy Design Review
	Large Industrial	Large Industrial Energy Design Assistance/Energy Design Review
	Renewable Rewards	Business Renewable Rewards
	Schools and Government	Government Schools Energy Design Assistance/Energy Design Review
	Pilots	Community Impact Life Sciences Midstream
Midstream	Instant Discount	Commercial Residential

2.2. Summary of Measures by Channel

The evaluation team assessed the electric and natural gas savings achieved by each measure installed in CY 2025 during its first year of operation, as well as any impacts incurred by each measure during its effective useful life. Reporting on both first-year annual and lifecycle savings provides a full picture of each program's performance.

[4] The independent evaluation team comprises Cadmus and Apex Analytics.

Table 8 lists all measure categories in the residential, nonresidential, and midstream programs.

Table 8. CY 2025 Residential, Nonresidential, and Midstream Measure Categories

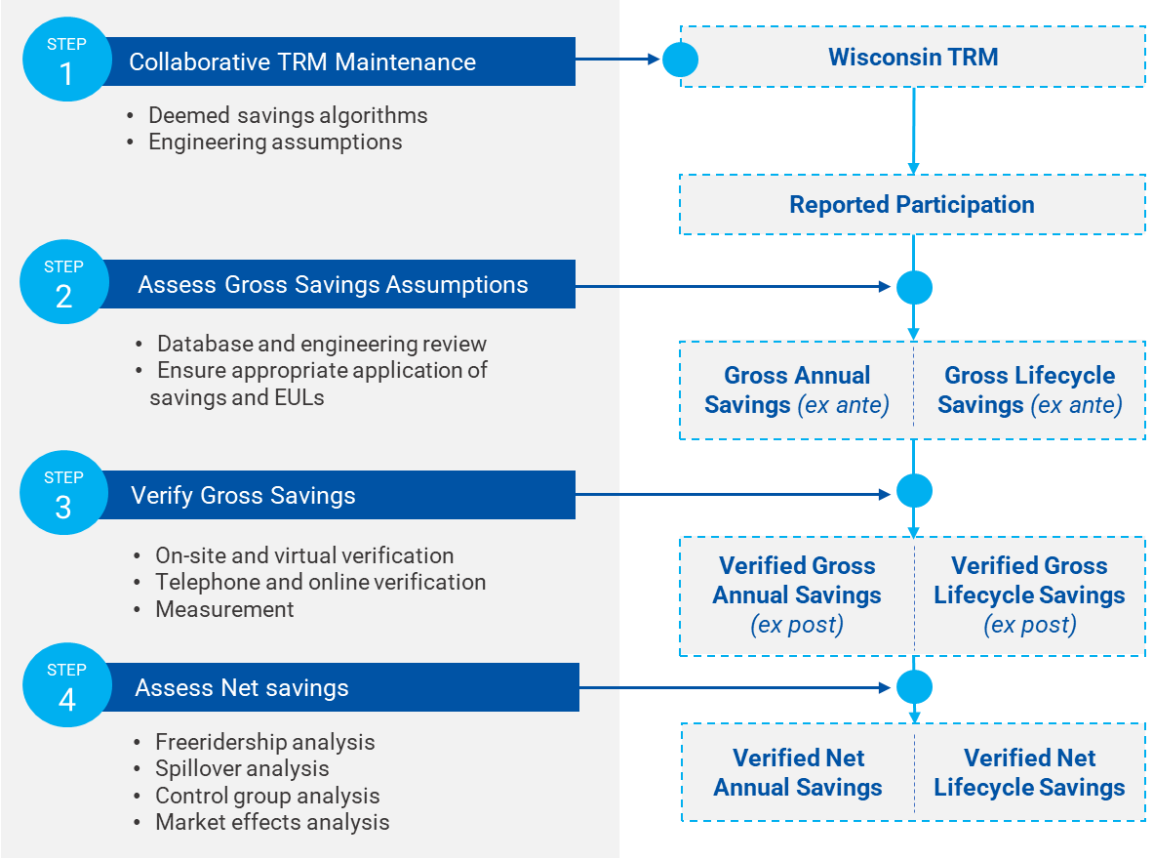
Measure Categories	
All	
Boilers & Burners - Boiler	HVAC - Heat Pump
Domestic Hot Water (DHW) - Water Heater	HVAC - Heating Equipment
HVAC - Controls	Miscellaneous - Adjustment Measure
Instant Discount	
Food Service - Cooking	Food Service - Refrigeration
Food Service - Dishwashing	
Non-Residential	
Ag Equipment - Controls	Greenhouse - Thermal Curtains
Ag Equipment - DHW	HVAC - Chiller
Ag Equipment - Fan	HVAC - Cooling Equipment
Ag Equipment - Grain Dryer	HVAC - Heat Recovery
Ag Equipment - Heat Exchanger	HVAC - VSD
Ag Equipment - Tune-up/Repair	HVAC - Ventilation Equipment
Ag Equipment - Variable Speed Drive (VSD)	Lighting - NC Lighting
Ag Equipment - Waterer	Lighting - Other
Boilers & Burners - Heat Recovery	Lighting(old) - Light Emitting Diode (LED)(old)
Boilers & Burners - VSD	Miscellaneous - School Challenge
Bonus - Planning	Process Equipment - Data Center/IT
Bonus - Trade Ally	Process Equipment - Laboratory
Building Shell - Docks & Doors	Process Equipment - Other
Building Shell - Unspecified	Process Equipment - Paper
Compressed Air Vacuum - Air Compressor	Process Equipment - Process Cooling
Compressed Air Vacuum - Air Treatment	Process Equipment - Process Heating
Compressed Air Vacuum - Controls	Process Equipment - Pumping/Piping
Compressed Air Vacuum - Demand-Side	Process Equipment - VSD
Compressed Air Vacuum - Heat Recovery	Process Equipment - Waste Water Treatment Plant
Compressed Air Vacuum - Other	Refrigeration - Cases
Compressed Air Vacuum - Tune-up/Repair	Refrigeration - Controls
Compressed Air Vacuum - Vacuum Pump	Refrigeration - Fans
Energy Management – Retro-commissioning	Refrigeration - Heat Recovery
Energy Management - Strategic Energy	Refrigeration - Lighting
Management	Refrigeration - Other
Energy Management - Utility Bill Verified	Renewables - Biogas
SavingsFood Service – Other	Renewables - Biomass
Greenhouse - Greenhouse Controls	Renewables - Hydro
	Food Service – Ventilation
Residential	
Appliance Plug Loads - Advanced Power Strip	Bonus - Equipment
Appliance Plug Loads - Room Air Cleaner	Bonus - Other
Bonus - Bonus	Bonus - Survey/Study
Building Shell - Air Sealing	Building Shell - Building Element
DHW - Low-Flow Devices	Building Shell - Insulation
DHW - Other	DHW – Electronically Commutated Motor Pumps
DHW - Pipe Insulation	HVAC - Fans
HVAC - Distribution Improvements	HVAC - Other

Measure Categories	
HVAC - Tune-up/Repair	HVAC - Pumps
Miscellaneous - Packs Kits	Lighting - LED Fixtures
New Construction - Residential New Construction	Lighting - LED Screw-in Lamps
Boilers & Burners - Burners	Lighting - LED, Other
Boilers & Burners - Controls	Lighting - Lighting Controls
Boilers & Burners - Insulation	Lighting - TLED
Boilers & Burners - Steam Traps	Miscellaneous - Other
Boilers & Burners - Tune-up/Repair	New Construction - Energy Design Assistance (EDA)
	New Construction - Energy Design Review (EDR)
	Renewables - Solar Photovoltaic (PV)

2.3. Overview of Evaluation Activities

Figure 2 depicts the four-step process the evaluation team used to conduct the CY 2025 evaluation. This process is further explained below.

Figure 2. Evaluation Steps to Determine CY 2025 Gross and Net Savings



Step 1. Collaborative Technical Reference Manual (TRM) Maintenance. The evaluation team collaborated with the PSC and key Focus on Energy stakeholders to ensure that the programs' deemed savings, algorithms, and input assumptions were appropriate. Specific activities included developing measure-specific work papers and updating the Wisconsin Focus on Energy TRM.

Step 2. Gross Savings Assumptions Assessment. The evaluation team reviewed the implementation database to check for data entry errors, inconsistencies, ineligible equipment, and any other possible errors. The team reconciled this information with data from the administrator and the implementers. This process produced the *ex ante* gross annual and lifecycle savings.

Step 3. Gross Savings Verification. The evaluation team verified the installation of measures—either through site visits or surveys—and assessed gross savings, including revisiting baseline assumptions and engineering inputs. The team also recalculated or measured the actual performance of installed measures, particularly for hybrid and custom projects. The team applied the data collection and analysis methods appropriate for the specific programs, offerings, and installed measures. This process produced the *ex post* (verified) gross annual and lifecycle savings.

Step 4. Net Savings Assessment. The evaluation team estimated net-to-gross (NTG) ratios that represent the proportion of gross savings directly attributable to the programs' influence. In deriving these ratios, the team accounted for and deducted reported savings that were associated with freeriders (participants who would have undertaken the same action and achieved the same savings in the absence of an offering) and also accounted for and added spillover (savings that were the result of an offering's influence, but for which no incentive was paid and for which no program had recorded savings).

The evaluation team applied NTG ratios to the *ex post* gross savings from Step 3 to determine verified net savings. Table 9 lists the specific data collection activities and number of completions in the residential, nonresidential, and midstream channels for the CY 2025 evaluation.

Table 9. CY 2025 Evaluation Activities and Number of Completions by Channel

Evaluation Activity	Residential	Nonresidential	Midstream	Total CY 2025
On-Site and Virtual Site Visits Evaluation, Measurement, and Verification[a]	0	128	0	**128**
Engineering Desk Reviews	108	269	0	**377**
General Population Surveys	344	0	0	**344**
Participant Surveys and Interviews	108	105	436	**649**
Ongoing Participant Satisfaction Surveys[b]	3,017	317	0	**3,334**
Trade Ally/Market Actor Interviews	0	25	20	**45**

[a] All evaluated measures included in the on-site and virtual evaluation, measurement, and verification also received an engineering desk review.

[b] This row includes only the 18% sample from all Direct to Customer Packs ongoing participant satisfaction survey responses that the team analyzed for the CY 2025 evaluation.

3. Evaluation Findings

Table 10 lists the overall verified gross lifecycle electric savings, peak demand reduction, and natural gas savings for the portfolio in CY 2023, CY 2024, and CY 2025.

Table 10. Overall Portfolio Verified Gross Lifecycle Savings by Calendar Year

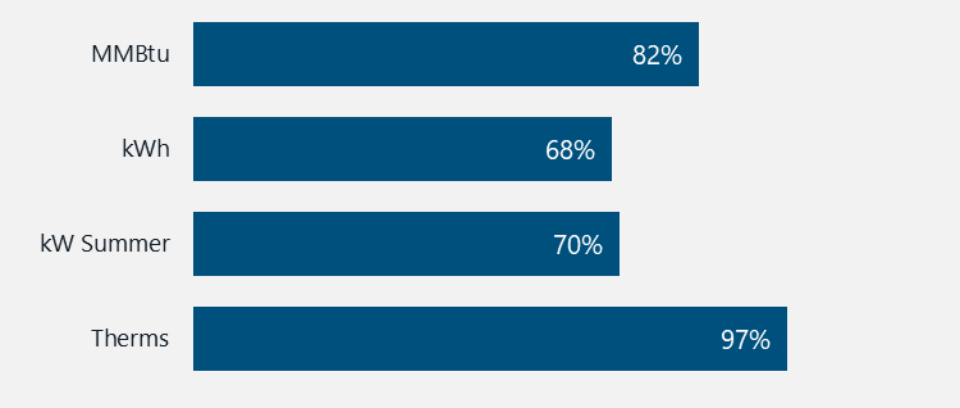
Calendar Year	Overall Savings (MMBtu)	Electric Savings (kWh)	Summer Demand Reduction (kW)	Winter Demand Reduction (kW)[a]	Natural Gas Savings (therms)
CY 2023	64,476,964	7,446,114,252	78,410	N/A	390,708,223
CY 2024	55,978,211	7,695,474,300	64,941	N/A	297,212,526
CY 2025	60,693,900	7,007,760,268	65,937	43,303	367,834,218
Quad IV Total	**181,149,075**	**22,149,348,820**	**209,288**	**43,303**	**1,055,754,967**

[a] CY 2025 is the first year that this metric was tracked and reported.

As outlined under *Key Achievements* above, the PSC ordered that the Focus on Energy administrator track quadrennium savings goals compared to verified gross lifecycle savings targets. In CY 2025, the administrator reached 82% of the MMBtu savings goal, 68% of the electric energy savings goal, 70% of the summer peak demand reduction goal, and 97% of the natural gas savings goal.

Figure 3 shows the actual quadrennium savings totals compared to the administrator's quadrennium savings goals.

Figure 3. Achievement of Four-Year (CY 2023-CY 2026) Verified Gross Lifecycle Savings Goals



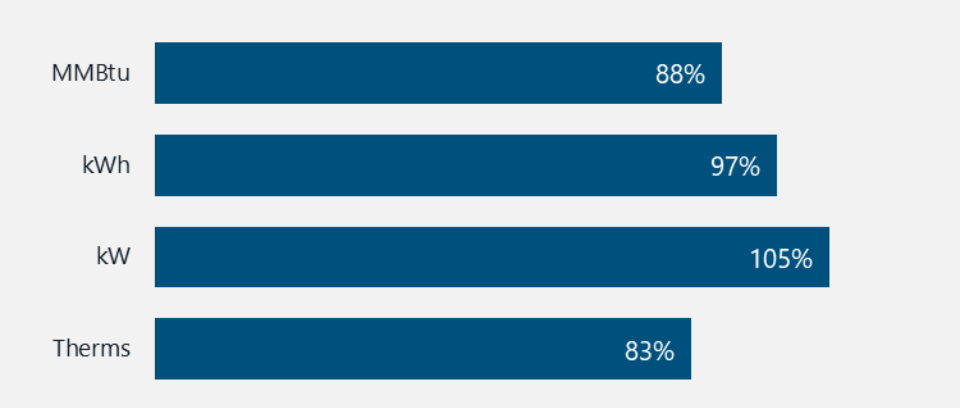
Note: Percentages represent achievements to date (CY 2025) of the administrator's established overall verified gross lifecycle goals for the quadrennium. Note: Winter kW goals were not established for Quadrennium IV.

The administrator also sets its own interim annual verified gross lifecycle targets as it tracks toward the overall CY 2023-2026 quadrennium savings goals. In CY 2025, these targets represented 68,935,110 MMBtu, 7,257,265,037 kWh, 63,029 summer kW, and 441,733,217 therms.

The administrator reached 88% of the CY 2025 MMBtu savings goal, 97% of the electric energy savings goal, 105% of the electric summer demand reduction goal, and 83% of the natural gas verified gross

lifecycle savings goal. Figure 4 shows the CY 2025 actual savings totals compared to the administrator's CY 2025 savings goals.

Figure 4. Achievement of CY 2025 Verified Gross Lifecycle Savings Goals



Note: Percentages represent the achievements of the administrator's verified gross lifecycle goals for CY 2025. Note: Winter kW goals were not established for Quadrennium IV.

Table 11 lists the overall net lifecycle MMBtu, electricity, summer and winter peak demand, and natural gas savings for Focus on Energy's portfolio in CY 2023, CY 2024, and CY 2025.

Table 11. Overall Portfolio Net Lifecycle Savings by Calendar Year

Calendar Year	Overall Savings (MMBtu)	Electric Savings (kWh)	Summer Demand Reduction (kW)	Winter Demand Reduction (kW)[a]	Natural Gas Savings (therms)
CY 2023	52,714,227	5,681,402,139	57,423	N/A	333,292,828
CY 2024	44,882,758	6,131,369,659	51,083	N/A	239,625,243
CY 2025	47,927,316	5,436,459,954	50,984	35,051	293,781,143
Quad IV Total	**145,524,300**	**17,249,231,752**	**159,490**	**35,051**	**866,699,214**

[a] CY 2025 is the first year that this metric was tracked and reported.

The PSC Final Decision for Quadrennial Planning Process IV (PSC Ref#:453081) set four-year net lifecycle savings goals for the PSC at 70% of the gross lifecycle goals. Following the gross savings goal structure, the portfolio is required to meet only 70% of the electric energy savings and natural gas savings goals over the full quadrennium; remaining MMBtu savings above the 70% threshold can be met with either fuel. These minimum thresholds allow flexibility in offering delivery in the changing markets.

The 2023-2026 net quadrennial goals are listed in Table 12. These goals represent 70% of the gross quadrennial goals listed in Table 1.

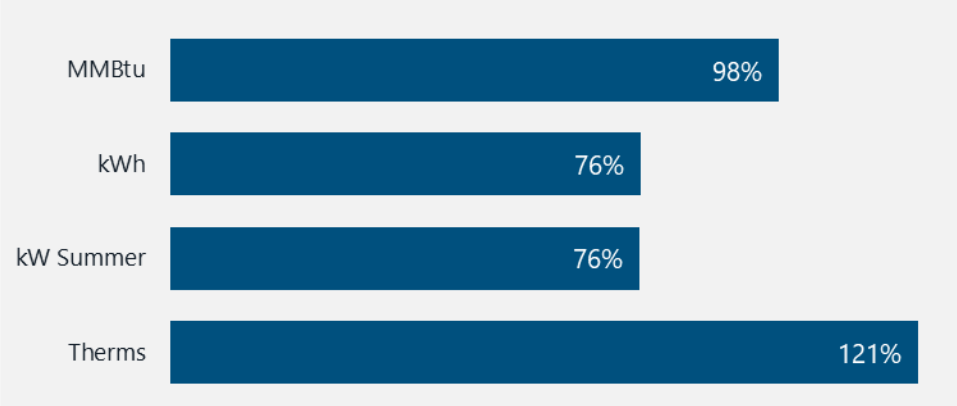
Table 12. Focus on Energy Quadrennium IV Net Goals

Unit	Net Goal
Lifecycle MMBtu	153,842,820
Lifecycle kWh	22,707,767,675
kW Summer	210,688
Lifecycle therms	763,639,168

Lifecycle kWh and Lifecycle therms goals reflect full targets; they are not adjusted for the 70% minimum threshold.
Note: Winter kW goals were not established for Quadrennium IV.

Figure 5 compares Focus on Energy's verified net savings to the PSC's established verified net savings goals for the full four-year quadrennium. The Focus on Energy offerings reached 98% of the MMBtu net savings goal, 76% of the electric energy net savings goal, 76% of the electric net demand reduction goal, and 121% of the natural gas quadrennium net savings goal to date.

Figure 5. Achievement of Four-Year (CY 2023-CY 2026) Net Lifecycle Savings Goals



Note: Percentages represent achievement to date (CY 2025) of PSC's established overall net lifecycle goals for the quadrennium. Note: Winter kW goals were not established for Quadrennium IV.

3.1. Summary of Impacts by Offering

This section summarizes the CY 2025 savings and participation for each offering in the Focus on Energy portfolio. Volume II details the savings for each offering and the approaches the team used to calculate them. The evaluation team varied the calculation approach and activities by offering, depending on the level of participation, savings achieved, and information available. Across all offerings, the evaluation team applied equations for verified gross lifecycle, net annual, and net lifecycle savings:

$$Verified\ Gross\ Lifecycle\ Savings\ = \sum(Verified\ Gross\ Annual\ Savings \times EUL\ for\ each\ measure)$$

$$Verified\ Net\ Annual\ Savings = \sum(Verified\ Gross\ Annual\ Savings\ \times NTG\ for\ each\ measure)$$

$$Verified\ Net\ Lifecycle\ Savings = \sum(Verified\ Gross\ Lifecycle\ Savings \times NTG\ for\ each\ measure)$$

Table 13 lists the total CY 2025 participation (measured as the number of participating customers) in each offering and channel.

Table 13. CY 2025 Total Participation by Offering

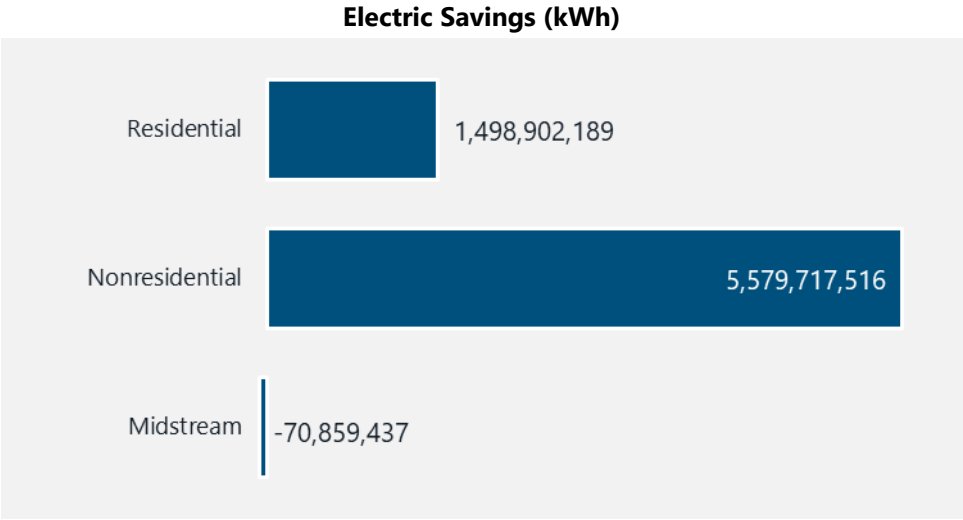
Channel	Program	Offering	CY 2025 Participation
Residential	Direct to Customer	Online Marketplace	16,752
		Packs	114,825
		Income Qualified Direct Install Pilot	103
	Multifamily	Multifamily[a]	158
		Energy Design Assistance/Energy Design Review	93
	Renewable Rewards	Residential Renewable Rewards	2,166
		Department of Administration Solar/Heat Pump Pilot[a]	1
	Residential New Construction	Residential New Construction	2,540
		New Manufactured Homes Pilot	171
	Trade Ally Solutions	Heating and Cooling	697
		Insulation and Air Sealing	2,747
		Retail Smart Thermostats	1,606
		Tribal	3
	Pilots	Accessible Efficiency	189
Residential Subtotal			**142,051**
Nonresidential	Agribusiness	Agribusiness	761
	Business and Industry	Commercial and Industrial	1,252
		Energy Design Assistance/Energy Design Review	61
	Large Industrial	Large Industrial	223
		Energy Design Assistance/Energy Design Review	10
	Renewable Rewards	Business Renewable Rewards	203
	Schools and Government	Government	189
		Schools	265
		Energy Design Assistance/Energy Design Review	81
	Pilots	Community Impact	56
		Life Sciences Midstream	26
Nonresidential Subtotal			**3,127**
Midstream	Instant Discount	Commercial Midstream, Agricultural	1
		Commercial Midstream, Commercial	1,064
		Commercial Midstream, Industrial	34
		Commercial Midstream, Schools, and Government	184
		Residential Midstream[b]	27,735
Midstream Subtotal			**29,018**
Total			**174,196**

[a] Department of Administration Solar/Heat Pump Pilot participants are counted in both the Multifamily offering (for heat pumps) and under Renewable Rewards (for solar PV). There was one pilot participant in CY 2025; therefore, the Multifamily total customer count was reduced by 1 to avoid double-counting.

[b] The Residential Midstream offering targeted residential customers; however, the evaluation team cannot confidently determine whether measures were delivered to residential or nonresidential customers.

Figure 6 shows verified gross lifecycle savings by channel.

Figure 6. CY 2025 Verified Gross Lifecycle Savings Impacts by Channel



Note: In CY 2024, measures that increase electric energy use but reduce gas use were shifted from the Trade Ally Solutions Program to the Instant Discount Program, resulting in negative electric savings for the midstream channel.

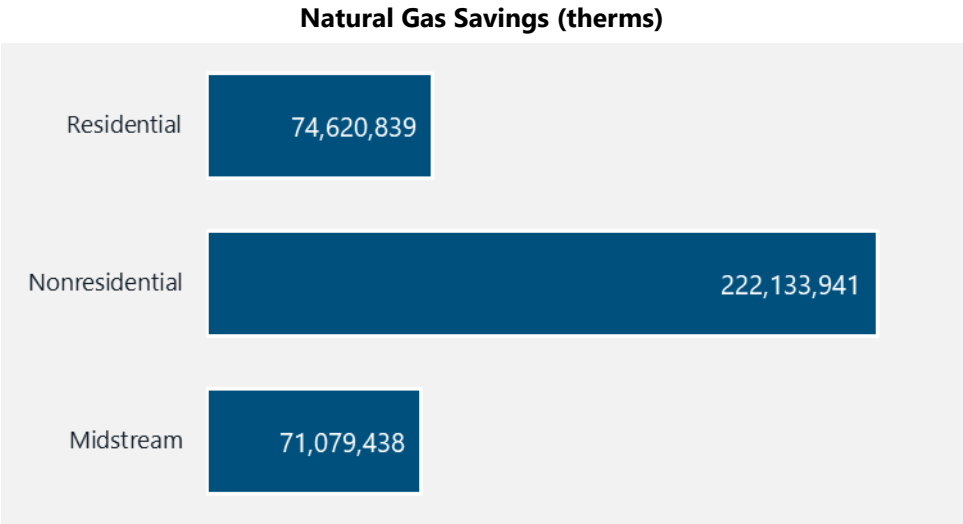
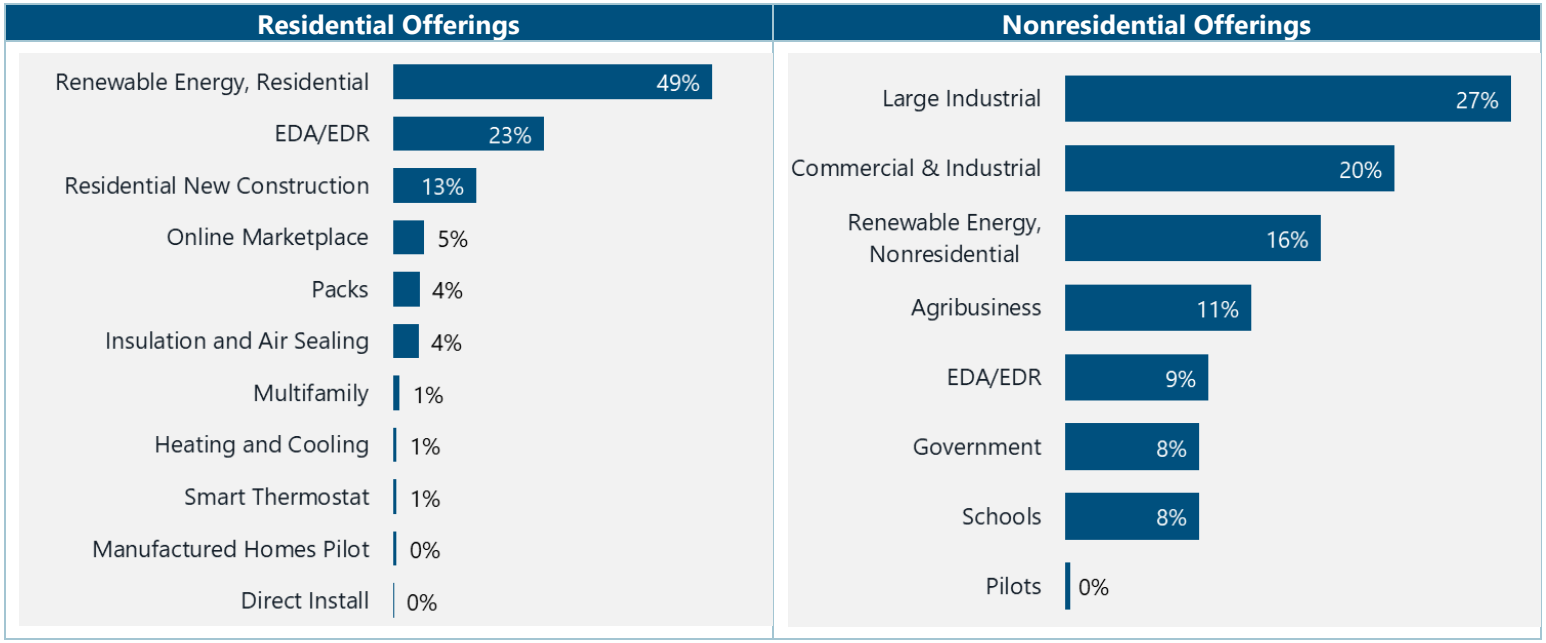


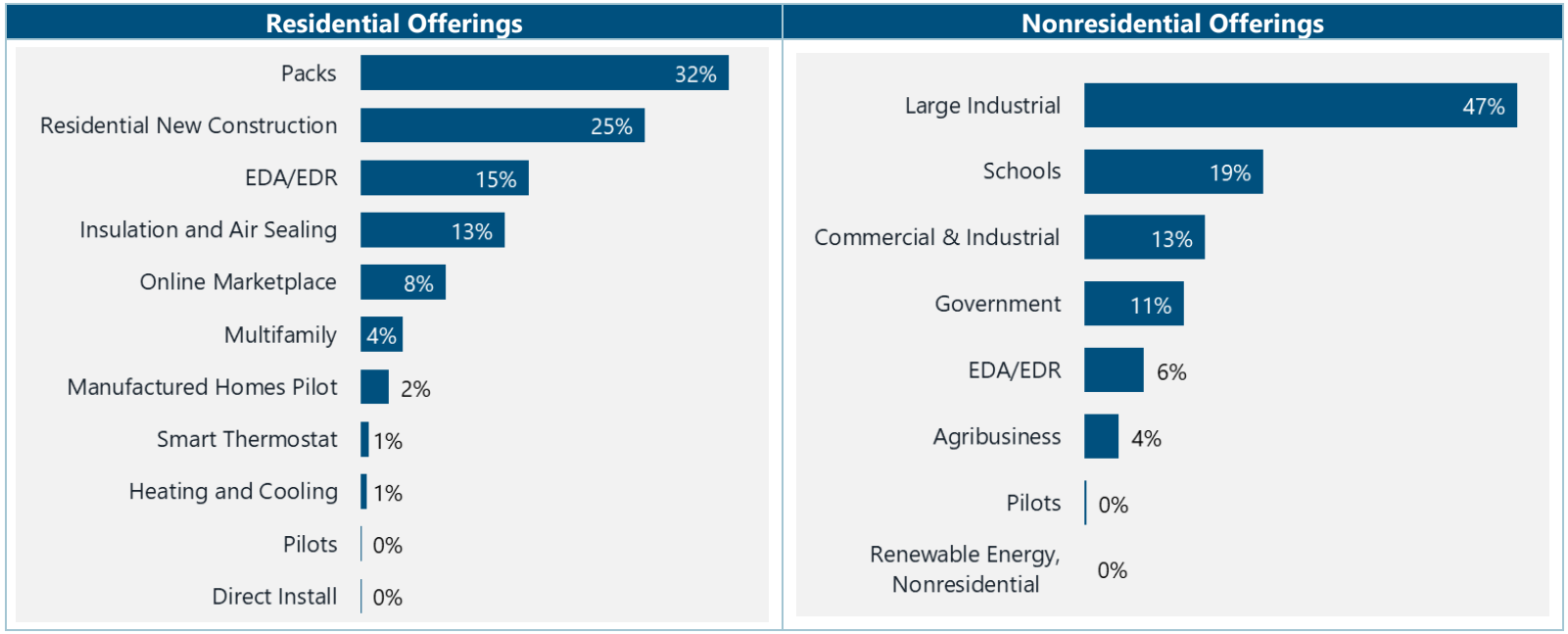
Figure 7 and Figure 8 show the percentage of lifecycle electric and natural gas savings that each offering contributes to the residential and nonresidential channels.

Figure 7. CY 2025 Verified Gross Lifecycle Electric Energy Impacts by Offering



Note: Totals may not sum to 100% due to rounding.

Figure 8. CY 2025 Verified Gross Lifecycle Natural Gas Energy Impacts by Offering



Note: Totals may not sum to 100% due to rounding.

Table 14 lists the first-year annual gross, verified gross, and verified net energy savings and demand reduction by offering, channel, and overall portfolio.

Table 14. Summary of CY 2025 Annual Savings by Offering

Program Name	Offering Name	Gross				Verified Gross				Verified Net			
		kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
Residential Programs													
Direct to Customer	Online Marketplace	7,770,319	63	102	570,381	7,773,621	2,035	186	570,616	6,815,747	1,788	158	496,384
	Packs	6,778,241	863	1,419	2,637,573	5,185,775	609	1,178	2,193,611	4,124,864	492	931	1,673,922
	Income Qualified Direct Install Pilot	63,142	0	0	3,488	63,142	17	2	3,488	63,142	17	2	3,488
Multifamily	Multifamily	1,249,093	60	100	114,458	1,249,093	60	100	114,458	1,036,747	49	83	95,000
	EDA/EDR	17,324,966	2,655	1,634	549,907	17,324,966	2,655	1,634	549,907	16,112,218	2,469	1,519	511,414
Renewable Rewards	Residential Renewable Rewards	26,598,953	5,661	2,543	0	26,084,090	5,631	2,806	0	14,085,409	3,041	1,515	0
Residential New Construction	Residential New Construction	6,387,144	1,920	759	622,967	6,387,144	1,920	759	622,967	447,100	134	53	664,440
	New Manufactured Homes Pilot	241,988	181	28	60,990	241,988	181	39	60,990	26,619	20	4	6,709
Trade Ally Solutions	Heating and Cooling	506,811	61	42	28,695	517,435	131	49	28,707	357,238	91	33	20,109
	Insulation and Air Sealing	2,344,632	2,384	37	377,223	2,344,630	2,491	40	377,220	2,136,925	2,283	30	330,387
	Retail Smart Thermostats	840,126	0	0	55,584	840,126	227	1	55,584	512,477	138	0	33,906
	Tribal	274	0	0	849	274	0	0	849	274	0	0	849
Pilots	Accessible Efficiency	105,513	10	15	4,647	73,944	13	13	4,432	73,944	13	13	4,432
Residential Total		**70,211,202**	**13,858**	**6,678**	**5,026,761**	**68,086,228**	**15,971**	**6,805**	**4,582,828**	**45,792,703**	**10,536**	**4,341**	**3,841,039**
Midstream Programs													
Instant Discount	Commercial Midstream	2,234,956	226	218	550,938	2,419,606	240	222	565,069	1,781,038	171	162	390,707
	Residential Midstream	-6,895,519	908	-2,321	3,156,026	-4,911,616	1,628	-2,236	3,184,069	-2,941,668	936	-1,301	1,898,804
Midstream Total		**-4,660,563**	**1,134**	**-2,104**	**3,706,964**	**-2,492,010**	**1,868**	**-2,014**	**3,749,138**	**-1,160,629**	**1,106**	**-1,139**	**2,289,510**
Nonresidential Programs													
Agribusiness	Agribusiness	43,074,851	6,361	3,366	474,753	43,074,851	6,361	3,366	474,753	33,598,384	4,961	2,626	370,307
Business and Industry	Commercial and Industrial	79,029,021	11,215	8,577	1,695,024	79,029,021	11,215	8,577	1,695,024	62,432,926	8,860	6,776	1,339,069
	EDA/EDR	10,633,091	1,747	1,501	305,569	10,633,091	1,765	1,501	305,569	9,888,775	1,641	1,396	284,179

Program Name	Offering Name	Gross				Verified Gross				Verified Net			
		kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms	kWh	kW Summer	kW Winter	therms
Large Industrial	Large Industrial	106,336,592	12,806	12,451	6,896,182	106,336,592	12,806	12,451	6,827,220	97,829,665	11,781	11,454	6,281,042
	EDA/EDR	2,454,867	533	328	3,752	2,454,867	533	328	3,677	2,283,026	496	305	3,420
Renewable Rewards	Business Renewable Rewards	31,179,092	6,410	3,171	0	31,179,092	6,410	3,725	0	23,072,528	4,743	2,757	0
Schools and Government	Government	31,340,662	2,492	2,562	1,249,599	31,340,662	2,442	2,562	1,249,599	22,251,870	1,734	1,819	887,215
	Schools	29,485,663	4,518	3,946	3,022,527	29,485,663	4,518	3,946	3,022,527	20,934,821	3,208	2,802	2,145,994
	EDA/EDR	11,308,017	1,874	2,012	401,949	11,308,017	1,874	2,012	401,949	10,516,456	1,743	1,871	373,813
Pilots	Life Sciences Midstream	977,365	112	43	0	977,365	112	43	0	977,365	112	43	0
	Community Impact	306,823	63	0	21,412	306,823	63	0	21,412	306,823	63	0	21,412
Nonresidential Total		**346,126,043**	**48,130**	**37,957**	**14,070,767**	**346,126,043**	**48,098**	**38,511**	**14,001,730**	**284,092,638**	**39,342**	**31,849**	**11,706,452**
Total All Offerings		**411,676,682**	**63,123**	**42,531**	**22,804,492**	**411,720,261**	**65,937**	**43,303**	**22,333,697**	**328,724,712**	**50,984**	**35,051**	**17,837,001**

Note: Totals may not match the sum of channel savings due to rounding.

3.2. Summary of Impacts by Measure Category

Table 15 lists annual energy savings, peak demand reduction, and incentive costs for the top 10 highest-saving residential measure categories in CY 2025, based on lifecycle MMBtu savings. See Appendix E. Detailed Findings in Volume III for a full list of all residential measure categories and their associated CY 2025 savings.

Table 15. Summary of CY 2025 Annual Savings by Measure Category in the Residential Channel

Measure Category	Verified Gross								Incentive Dollars	Incentive Dollars %
	kWh	kWh %	kW Summer	kW Summer %	kW Winter	kW Winter %	therms	therms %		
Renewables-Solar PV	26,084,090	38.31%	5,631	35.26%	2,806	41.23%	0	0.00%	$882,859	5.14%
New Construction-EDA	15,461,781	22.71%	2,365	14.81%	1,493	21.94%	473,091	10.32%	$1,681,516	9.78%
HVAC-Controls	8,552,563	12.56%	2,296	14.37%	86	1.26%	537,216	11.72%	$906,837	5.27%
New Construction-Residential	6,629,132	9.74%	2,101	13.16%	798	11.73%	683,957	14.92%	$4,051,927	23.57%
Miscellaneous-Packs Kits	5,185,775	7.62%	609	3.81%	1,178	17.31%	2,193,611	47.87%	$4,552,932	26.48%
Building Shell-Insulation	2,383,596	3.50%	2,508	15.70%	47	0.70%	406,193	8.86%	$1,771,218	10.30%
New Construction-EDR	1,863,185	2.74%	290	1.81%	141	2.07%	76,816	1.68%	$165,562	0.96%
DHW-Low-Flow Devices	223,246	0.33%	31	0.19%	71	1.05%	38,357	0.84%	$37,363	0.22%
Building Shell-Air Sealing	48,627	0.07%	3	0.02%	14	0.21%	69,141	1.51%	$1,859,789	10.82%
Boilers & Burners-Boiler	0	0.00%	0	0.00%	0	0.00%	59,354	1.29%	$82,043	0.48%

Table 16 lists the 10 highest-saving nonresidential measure categories in CY 2025, based on lifecycle MMBtu savings.

Table 16. Summary of CY 2025 Annual Savings by Measure Category in the Nonresidential Channel

Measure Category	Verified Gross								Incentive Dollars	Incentive Dollars %
	kWh	kWh %	kW Summer	kW Summer %	kW Winter	kW Winter %	therms	therms %		
LED Fixtures	84,743,449	24.48%	8,731	18.15%	9,022	23.43%	0	0.00%	$6,253,387	18.40%
VSD	57,523,625	16.62%	8,212	17.07%	5,553	14.42%	0	0.00%	$1,695,364	4.99%
Other [a]	36,580,881	10.57%	4,765	9.91%	3,977	10.33%	2,599,693	18.57%	$4,320,707	12.72%
Solar PV	31,179,092	9.01%	6,410	13.33%	3,725	9.67%	0	0.00%	$1,565,855	4.61%
EDA	20,831,664	6.02%	3,522	7.32%	3,719	9.66%	652,033	4.66%	$2,390,884	7.04%
Tune-up/Repair	15,129,864	4.37%	1,746	3.63%	1,674	4.35%	946,984	6.76%	$257,947	0.76%
Fan	12,389,965	3.58%	1,976	4.11%	0	0.00%	0	0.00%	$510,965	1.50%
TLED	12,000,657	3.47%	2,207	4.59%	2,260	5.87%	0	0.00%	$606,689	1.79%
LED, Other	9,487,975	2.74%	1,477	3.07%	1,471	3.82%	0	0.00%	$722,414	2.13%
Air Compressor	9,008,282	2.60%	1,342	2.79%	2,074	5.38%	0	0.00%	$351,286	1.03%

[a] Other in the nonresidential channel encompasses a wide variety of measures, such as unspecified process improvements, unspecified HVAC improvements, unspecified refrigeration improvements, and industrial oven/furnace.

Table 17 lists the 10 highest-saving midstream measure categories in CY 2025, based on lifecycle MMBtu savings.

Table 17. Summary of CY 2025 Annual Savings by Measure Category in the Midstream Channel

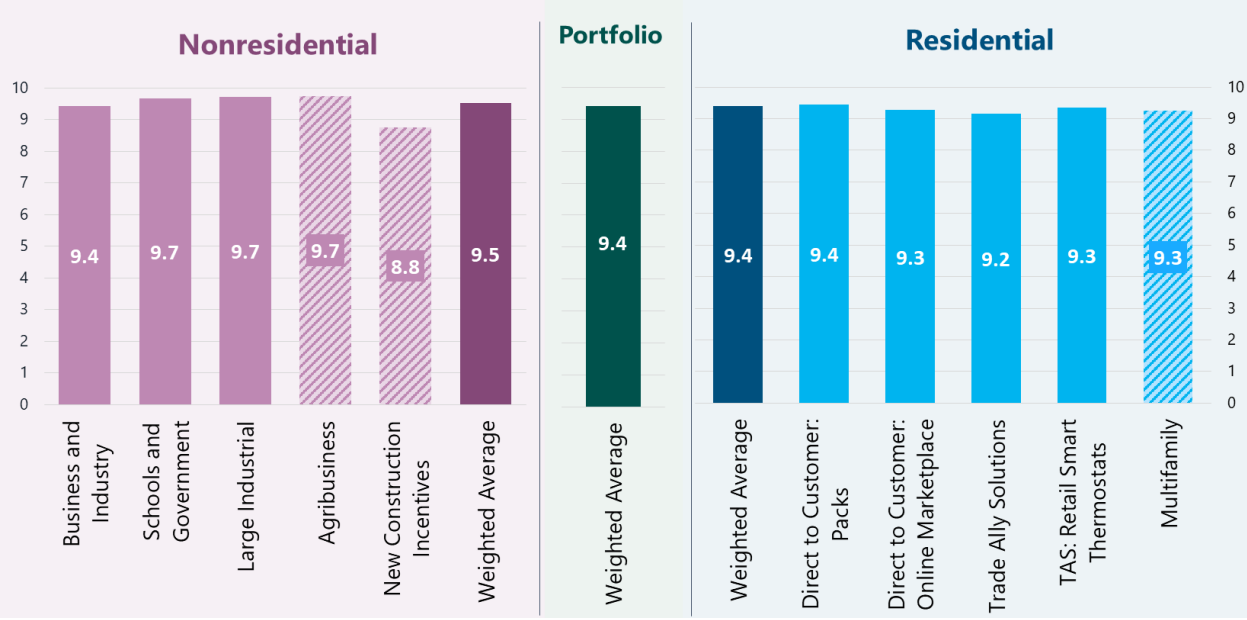
Measure Category	Verified Gross								Incentive Dollars	Incentive Dollars %
	kWh	kWh %[a]	kW Summer	kW Summer %	kW Winter	kW Winter %	therms	therms %		
HVAC-Heating Equipment	2,534,085	-101.69%	0	0.00%	874	-43.39%	1,172,072	31.26%	$2,286,150	35.13%
Dishwashing	1,714,263	-68.79%	128	6.84%	138	-6.88%	6,085	0.16%	$34,750	0.53%
HVAC-Controls	1,660,972	-66.65%	448	23.98%	2	-0.10%	109,568	2.92%	$206,760	3.18%
DHW-Water Heater	1,238,557	-49.70%	198	10.58%	320	-15.87%	76,961	2.05%	$481,331	7.40%
Ventilation	233,090	-9.35%	20	1.08%	19	-0.92%	33,990	0.91%	$57,500	0.88%
Cooking	224,127	-8.99%	25	1.33%	27	-1.33%	367,608	9.81%	$765,670	11.77%
Heating Equipment	10,978	-0.44%	0	0.00%	4	-0.20%	46,820	1.25%	$17,875	0.27%
Boiler [a]	0	0.00%	0	0.00%	0	0.00%	42,552	1.13%	$17,150	0.26%
Boiler & Burners-Boiler [a]	0	0.00%	0	0.00%	0	0.00%	155,329	4.14%	$260,100	4.00%
HVAC-Heat Pump	-10,345,230	415.14%	982	52.58%	-3,431	170.40%	1,670,139	44.55%	$1,971,725	30.30%

[a] kWh percentages at the measure level are not included in this table because the substantial negative kWh impacts from heat pumps offset positive impacts from other measures. This resulted in relatively modest kWh savings at the channel level. As such, comparing large measure-level kWh savings or impacts to small channel-level savings can yield misleading or illogical measure-level savings percentages.

3.3. Portfolio Participant Satisfaction Findings

The program administrator fielded online customer satisfaction surveys throughout CY 2025 to residential and nonresidential program participants. Across all offerings surveyed in CY 2025, the average participation-weighted overall satisfaction rating for the portfolio was 9.4. The participation-weighted average for the residential programs was 9.4, and for the nonresidential programs, 9.5. Figure 9 shows the average overall satisfaction ratings for the CY 2025 portfolio.

Figure 9. CY 2025 Portfolio Average Overall Satisfaction Ratings



Source: Ongoing Participant Satisfaction Online Survey Question. "Overall, how satisfied are you with your most recent experience with Focus on Energy?" Business and Industry CY 2025 (n=101); Schools and Government CY 2025 (n=114); Large Industrial CY 2025 (n=66); Agribusiness CY 2025 (n=19); New Construction Business Prescriptive CY 2025 (n=17); Packs CY 2025 (n=1,406); Online Marketplace CY 2025 (n=1,226); Trade Ally Solutions CY 2025 (n=229); Retail Smart thermostats CY 2025 (n=123); Multifamily CY 2025 (n=8). The portfolio, residential, and nonresidential averages are weighted by total participation in the offerings surveyed. Please interpret with caution, as textured bars represent results from fewer than 20 surveys.

3.4. Residential Process Evaluation Findings

For the CY 2025 process evaluation of residential offerings, the evaluation team collected information and perspectives from Focus on Energy participants and trade allies. Table 18 shows residential process evaluation activities conducted in CY 2025 by offering.

Table 18. CY 2025 Residential Process Evaluation Activities by Program and Offering

Program	Offering	Participant Surveys	Ongoing Participant Satisfaction Surveys
Direct to Customer	Online Marketplace	0	1,236
	Packs	0	1,416
	Income Qualified Direct Install Pilot	21	N/A
Multifamily	Multifamily	0	8
	Express EDA Participant Interviews	6[a]	N/A
Renewable Rewards	Residential Renewable Rewards	0	N/A
Trade Ally Solutions	Heating and Cooling, and Insulation and Air Sealing	0	233
	Retail Smart Thermostats	81	124
Residential New Construction	Residential New Construction	0	N/A
	New Manufactured Homes Pilot	0	N/A

[a] Participant interviews

In CY 2025, more than 160,000 residential customers in Wisconsin participated in Focus on Energy's offerings. Residential customers installed energy-efficient measures across a wide range of technologies and achieved verified gross annual electric savings of 59,549,664 kWh and natural gas savings of 7,114,413 therms.

The evaluation team also conducted interviews with nine owners and managers of multifamily affordable housing buildings. The purpose of this research was to collect insights from this population to inform Focus on Energy's design of future programs to better meet the needs of affordable housing providers and tenants.

Residential General Population

The evaluation team also collected perspectives and information from participating and nonparticipating residential customers through a general population survey. The CY 2025 survey gathered 344 responses from adults responsible for their household's energy decisions and provides insight into Focus on Energy's awareness, participation, motivations, and barriers among Wisconsin residents. Table 19 provides a summary of the survey design for the CY 2025 general population survey (details in Appendix K. Residential General Population Survey Findings in Volume III).

Table 19. CY 2025 Residential General Population Survey Activities

Activity Area	Description
Survey Mode	Web-based survey conducted via Qualtrics
Fielding Dates	October 28 – November 17, 2025
Completed Surveys	344 total completes (Wisconsin residents in Focus territory familiar with home energy decisions)
Languages Offered	English and Spanish (13 Spanish completes).
Sampling Method	Qualtrics research panel with in-survey screening; statewide coverage across Focus territory zip codes.
Quality Controls	Attention checks, speeding checks, removal of speeders, and removal of respondents with consistently low-quality open-ended responses
Topic Areas	Awareness, participation, brand perceptions, barriers, perceived control over energy bills, electrification awareness, and interest

Demographics

Survey respondents generally reflect Wisconsin's residential population, with some variation across housing, education, income, and utility coverage. Survey respondents were more likely to live in single-family homes and own their homes, with 74% residing in single-family detached homes (compared to 66% statewide) and 76% reporting homeownership (compared to 68% statewide). The level of education is also slightly higher than the Wisconsin population, with 27% holding a bachelor's degree (compared to 23% statewide). A smaller share (22%) reported a high school diploma as their highest level of education (compared to 29% statewide). In contrast, survey respondents tended to have lower incomes. Forty-three percent of respondents reported annual incomes below $50,000 (vs. 31% statewide), while smaller shares fell into higher income brackets.

Utility representation in the sample closely aligns with statewide distributions (sample vs. statewide), including WE Energies (45% vs. 37%), Alliant Energy (16% vs. 15%), Wisconsin Public Service (14% vs. 14%), and Xcel Energy (9% vs. 8%), with slightly lower representation from other utilities.

Focus Awareness and Program Participation

Overall familiarity with Focus on Energy remains high. Seventy-three percent of respondents reported at least some familiarity with the program. Brand affinity continues to be one of Focus on Energy's strongest assets—among those aware of the program, 68% to 96% agreed that Focus is trustworthy, provides valuable offerings, increases awareness of energy-saving opportunities, and helps lower energy costs.

Among respondents who were aware of Focus on Energy, 62% reported participating in at least one offering—a decline from 82% in CY 2021. Participation remains highest for Free Energy Savings Packs, while awareness and uptake of the Online Marketplace and New Construction Certification remain comparatively low.

Participation Barriers and Motivations

CY 2025 survey results show that Wisconsin residents face both general barriers to completing home energy efficiency improvements and program-specific barriers that limit participation in Focus on Energy offerings. Across all residents, the most common barrier to completing an energy efficiency improvement

was upfront cost (53%), followed by lack of knowledge (22%), and housing limitations, including renting (16%), living in an older home (16%), or believing the home was already efficient (13%).

Among residents who were aware of Focus on Energy but had not participated, the most common participation barriers were also financial, including not having enough money for new equipment (32%) or the initial investment for qualifying upgrades (26%). Other barriers included renting/not owning the home (26%), prioritizing other home repairs (24%), and not knowing which equipment is eligible for rebates (20%).

Across all respondents, the strongest motivator for completing energy efficiency improvements was reducing energy bills (65%), followed by improving home comfort (15%). Environmental benefits and interest in new technologies were less commonly cited.

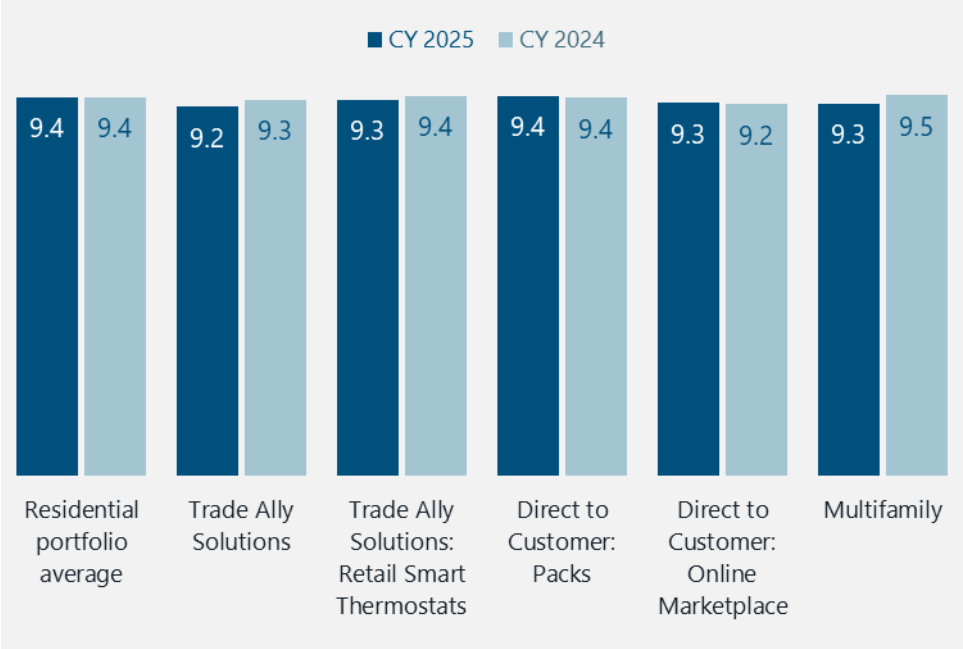
Residential Participant Satisfaction

The administrator fielded online customer satisfaction surveys throughout CY 2025 for the Trade Ally Solutions Program (including the Heating and Cooling and Insulation and Air Sealing offerings), retail smart thermostats, the Direct to Customer Program (including the Packs and Online Marketplace offerings), and the Multifamily Program. More than 9,000 Focus on Energy residential participants completed a survey in CY 2025.[5]

Surveys asked participants to rate their satisfaction with Focus on Energy's offerings on a scale from 0 to 10, where 10 meant *extremely satisfied,* and 0 meant *extremely dissatisfied*. Most CY 2025 respondents across offerings gave overall satisfaction ratings consistent with CY 2024 respondents, and for all residential offerings in CY 2025, average satisfaction ratings were 9.2 or higher. There were no statistically significant differences in satisfaction ratings between CY 2024 and CY 2025. Figure 10 shows average satisfaction ratings among surveyed participants for residential offerings in CY 2025 compared with those in CY 2024.

[5] The evaluation team reports ratings only to the first decimal place; therefore, it randomly sampled surveys with substantially more than 2,500 responses so the precision level for statistical significance tests would not be narrower than 0.1 rating points, the minimum for a reported change in ratings. Without sampling, significance tests could indicate that two numbers that appear the same (to the first decimal place) are significantly different. The random sampling used a Monte Carlo technique so that reported ratings for the random sample and the ratings for the larger population are identical to the first decimal place. For the Packs offering, participants completed a total of 8,711 surveys in CY 2025 prior to data cleaning (7,984 after removing duplicates and blank responses); this was the only survey with more than 2,500 responses in CY 2025. After removing duplicates and applying this sampling technique, the team included a total of 3,017 residential participant surveys across all programs in the satisfaction analysis for CY 2025 reporting.

Figure 10. CY 2025 Average Overall Satisfaction Ratings for Residential Offerings



Source: Ongoing Participant Satisfaction Online Survey Question. "Overall, how satisfied are you with your most recent experience with Focus on Energy?" Trade Ally Solutions CY 2025 (n=229), CY 2024 (n=1,007); Retail Smart thermostats CY 2025 (n=123), CY 2024 (n=138); Packs CY 2025 (n=1,406), CY 2024 (n=1,556); Online Marketplace CY 2025 (n=1,226), CY 2024 (n=1,446); Multifamily CY 2025 (n=8), CY 2024 (n=31). The residential portfolio average is the average of all offerings surveyed during the year, weighted by total participation. There were no statistically significant differences between years.

Net Promoter Score

The evaluation team calculated a net promoter score (NPS) for each offering based on the participant's likelihood of recommending it. The NPS is the percentage of promoters (respondents giving a rating of 9 or 10) minus the percentage of detractors (respondents giving a rating of 0 to 6), expressed as an absolute number between -100 and +100.

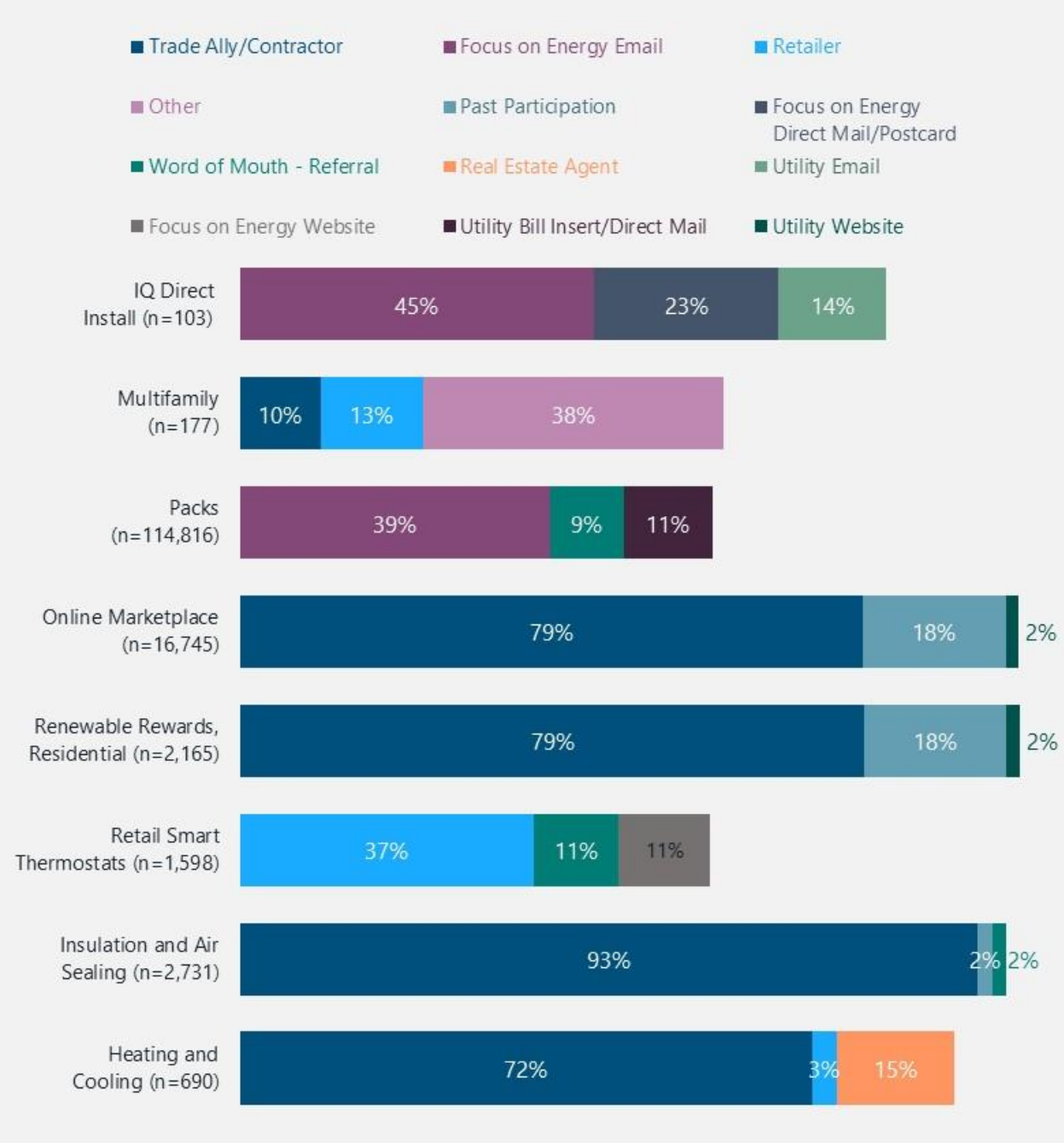
Generally, a positive NPS is interpreted as good, indicating a higher proportion of promoters to detractors. High NPS scores (+70 or higher) are theoretically predictive of customer behaviors, such as participating in another offering, implementing additional home energy improvements, and referring Focus on Energy offerings to others. The closer the NPS is to +100, the more favorable the respondents are toward the offering. NPS scores over +80 are considered excellent, while scores that dip below +50 warrant investigation into a possible opportunity for improvement.

Participants gave residential offerings high scores in CY 2025, with the NPS score ranging from +80 (Trade Ally Solutions; n=230) to +100 (Multifamily; n=8). The Trade Ally NPS score decreased by -3 points compared to CY 2024, and the Multifamily NPS score increased by +13 points compared to CY 2024.

Awareness by Program Participants and Opinion of Utility

In addition to ongoing participant satisfaction surveys, participants were asked how they became aware of Focus on Energy during the application process and this information was collected in the tracking data. Figure 11 shows the top three reported sources of awareness for each offering except Residential New Construction, for which the team did not collect sources of awareness.

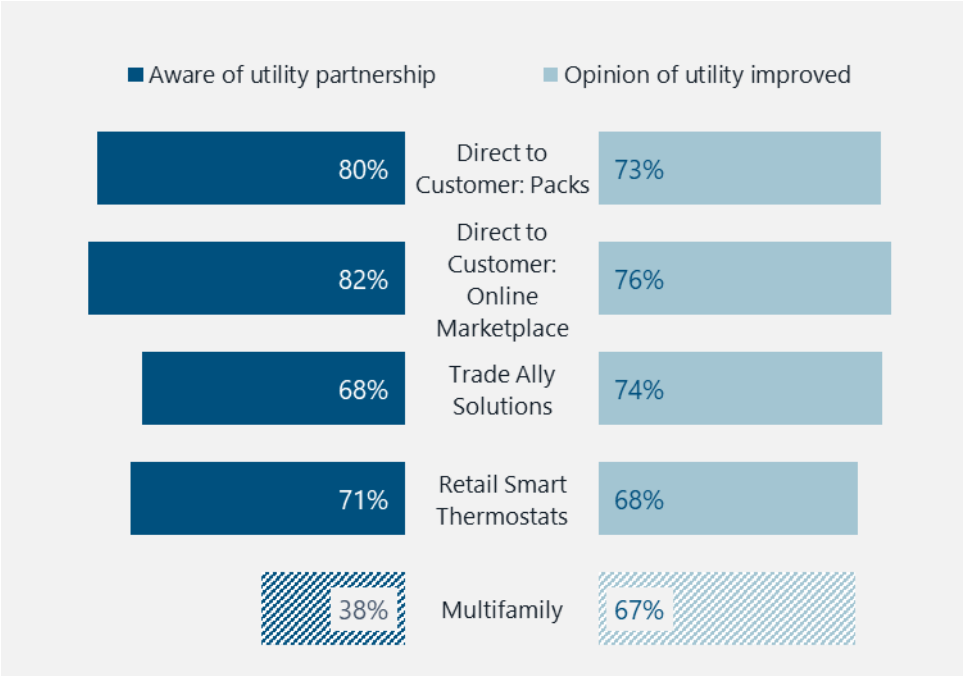
Figure 11. Residential Participants' Top Sources of Awareness by Offering



Source for all offerings: SPECTRUM data for residential offerings, field name, "How did Customer Hear About Focus?" Top three responses included for each offering.

In CY 2025, most residential survey respondents were aware that Focus on Energy offerings were offered in partnership with their local energy utility. The percentage of participants who were aware ranged from 38% of Multifamily respondents to 82% of Online Marketplace respondents (Figure 12). Most participants also reported that Focus on Energy offerings made their opinion of their utility *much more favorable* or *somewhat more favorable*, ranging from 67% for six Multifamily respondents to 76% for Online Marketplace. These results were consistent with survey respondents' levels of awareness and opinion of utilities in CY 2024, aside from Trade Ally Solutions, which saw increases in both awareness (up from 61% in CY 2024 to 68%) and giving more favorable ratings for their utility (up from 67% in CY 2024 to 74%).

Figure 12. Residential Participants' Awareness and Opinion of Utility Partnerships with Focus on Energy



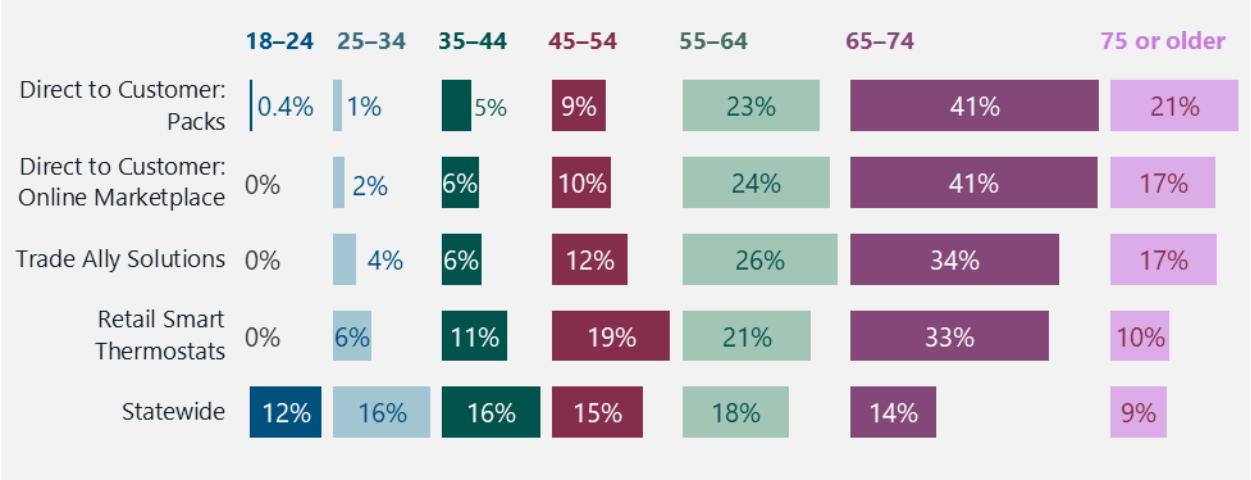
Offering source: Participant Satisfaction Survey Questions. "The Focus on Energy program you participated in is offered in partnership with your local energy utility. Before taking this survey, was this something you were aware of?" Trade Ally Solutions (n=221); Packs (n=1,379); Retail Smart thermostats (n=122); Online Marketplace (n=1,211); Multifamily (n=8). "How have these offerings affected your opinion of your energy utility, if at all?" Trade Ally Solutions (n=205); Packs (n=1,294); Retail Smart thermostats (n=114); Online Marketplace (n=1,144); Multifamily (n=6)

Residential Participant Profile

The evaluation team assessed which market segments participated in residential programs and offerings and to what extent the programs reached all market segments in CY 2025. The team compared demographic data collected in ongoing participant satisfaction surveys with data from the U. S. Census Bureau's 2024 American Community Survey for Wisconsin.

Figure 13 shows the age distribution of survey respondents by offering, alongside the statewide age distribution of Wisconsin residents, according to the 2024 American Community Survey data.[6] The American Community Survey data indicate that the Wisconsin adult population is relatively evenly distributed across all age ranges. However, most of Focus on Energy's participants were aged 55 to 74 (54% to 65% by offering).

Figure 13. Residential Participants' Age

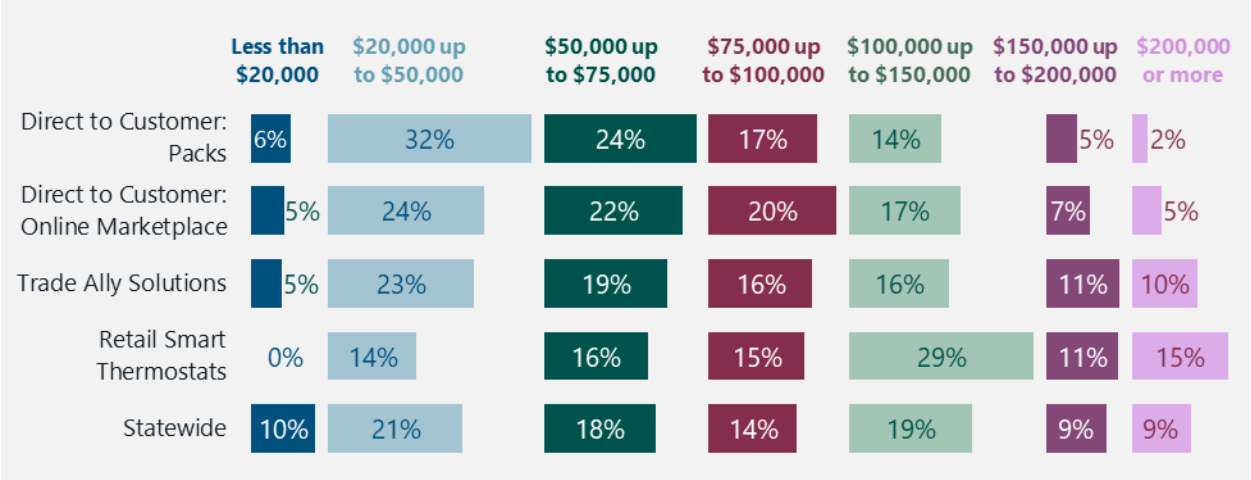


Offering source: Participant Satisfaction Survey Question. "Which of the following categories best represents your age?" Trade Ally Solutions (n=218), Packs (n=1,321), Online Marketplace (n=1,179), Retail Smart thermostats (n=113). Statewide source: Census 2024 American Community Survey, Selected Social Characteristics in the United States. Multifamily participant satisfaction surveys were conducted with landlords and did not collect demographic data; therefore, results are not presented here.

[6] U.S. Census. "Wisconsin." Accessed March 2026. https://data.census.gov/table/

Figure 14 shows the household income range of survey respondents relative to the general population. The American Community Survey data show that Wisconsin households are relatively evenly distributed across income levels between $20,000 and $150,000, with smaller percentages of households above and below that range. Direct to Customer offerings (Packs and Online Marketplace) and Trade Ally Solutions closely reflected this statewide distribution, while Retail Smart Thermostat respondents skewed toward higher-income groups (55% over $100,000 compared to 37% statewide). Respondents in the Packs offering were the most likely to be in lower-income brackets (62% under $75,000) and the least likely to be in higher-income brackets (21% over $100,000).

Figure 14. Residential Participants' Income Level

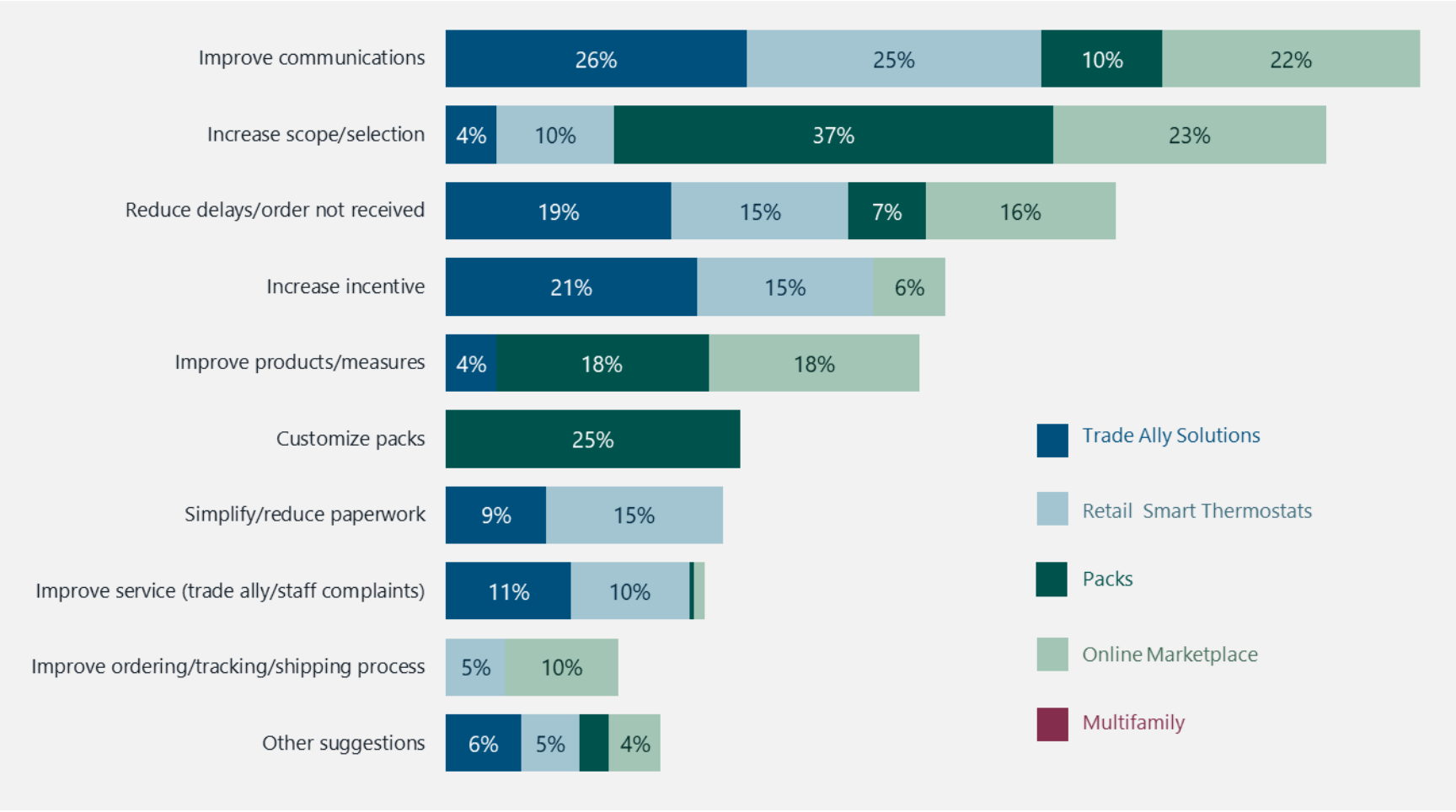


Offering source: Participant Satisfaction Survey Question. "Which category best describes your total household income before taxes?" Trade Ally Solutions (n=167), Packs (n=939), Online Marketplace (n=870), Retail Smart thermostats (n=80). Statewide source: Census 2024 American Community Survey, Selected Social Characteristics in the United States. Multifamily participant satisfaction surveys were conducted with landlords and did not collect demographic data; therefore, results are not presented here.

Participant Recommendations

The evaluation team analyzed open-ended comments and suggestions made by satisfaction survey respondents. Comments from CY 2025 respondents were evenly split between positive or complimentary comments and suggestions for improvement: comments about Trade Ally Solutions were 56% positive (n=106), and Online Marketplace comments were 50% positive (n=457), while Packs (45%, n=441) and Retail Smart Thermostat comments (43% positive, n=35) had more suggestions than compliments. Only two Multifamily respondents offered comments, and both were positive (no suggestions for improvement). The suggestions for improvement are summarized in Figure 15.

Figure 15. Residential Participants' Suggestions for Improving Offerings



Offering source: Participant Satisfaction Survey Question. "Please tell us more about your experience and any suggestions for improvement." Trade Ally Solutions (n=47), Retail Smart thermostats (n=20), Packs (n=244), Online Marketplace (n=229). Multifamily respondents did not offer any suggestions for improvement.

Across all residential programs, the most common suggestion in CY 2025 was to improve communications by providing more information about offerings and promoting them more effectively (10% to 26% of suggestions by offering). This was also the most common category of suggestions from respondents in the three prior years. Improving communications was the most common suggestion from Trade Ally Solutions respondents, with most relating to communication with trade allies about incentive applications and communications from Focus on Energy on the status of those applications. The most notable change from CY 2024 was the absence of suggestions from Multifamily respondents. In CY 2024, these respondents offered several suggestions for improvement, citing challenges with the application process (six of their nine suggestions for improvement); similarly, in CY 2023, Multifamily respondents did not provide any suggestions for improvement. In CY 2025, Smart Thermostat respondents' most common suggestion was to improve communications. The most common suggestions from the Packs respondents were to increase the scope and selection of items included (37%), with about half of those suggestions relating to lighting options (18%), and to customize the items in the packs (25%). In CY 2024, their top suggestion was to improve the quality of the items in the packs (30%), which only accounted for 18% of suggestions in CY 2025. The most common suggestion from Online Marketplace respondents was expanding the scope of items offered (23%), followed closely by improving communication (22%) and improving product quality (18%). Suggestions about improving communications regarding Direct to Customer programs included two contradictory themes: some respondents suggested broader and more frequent communications about program offerings, while others suggested that Focus on Energy should send them fewer marketing emails.

3.5. Nonresidential Process Evaluation Findings

For the CY 2025 process evaluation of nonresidential programs, the evaluation team collected information and perspectives from Focus on Energy participants and trade allies. Table 20 shows process evaluation activities by nonresidential offering. The process evaluation activities, including participant surveys and trade ally interviews, covered multiple programs.

Table 20. CY 2025 Nonresidential Process Evaluation Activities by Program and Offering

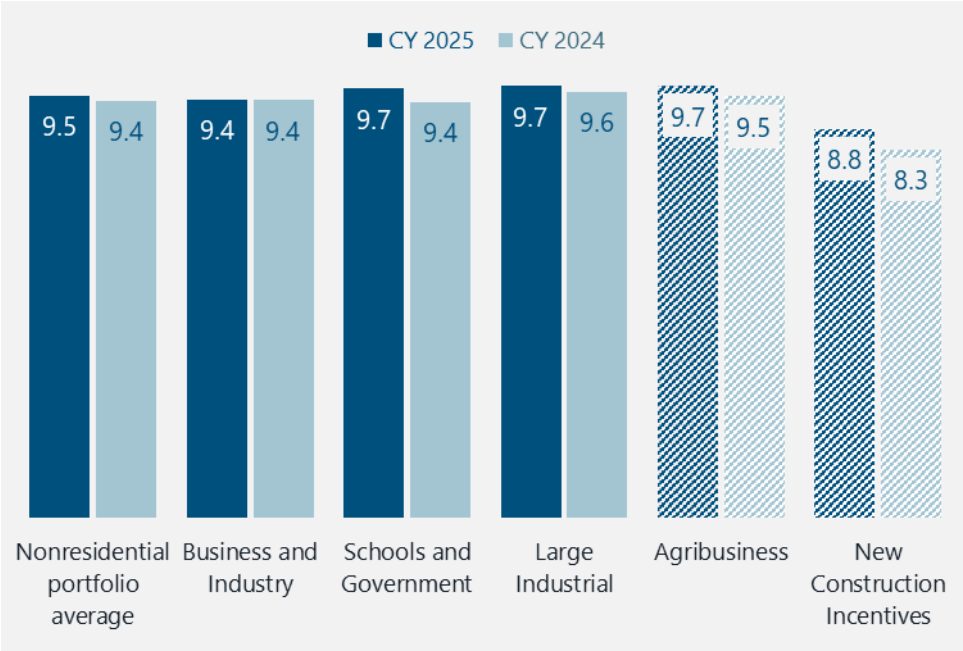
Program	Participant Surveys and Interviews	Ongoing Participant Satisfaction Surveys	Trade Ally Interviews
Agribusiness		✓	✓
Business and Industry	✓	✓	✓
Large Industrial	✓	✓	✓
Schools and Government		✓	✓

Nonresidential Participant Satisfaction

During CY 2025, the administrator fielded online surveys that asked participants in the Agribusiness, Business and Industry, Schools and Government, and Large Industrial Programs, as well as New Construction offerings, to rate their satisfaction with Focus on Energy's offerings and provide recommendations for improving the programs. In CY 2025, 317 Focus on Energy nonresidential participants completed a survey.

The surveys used a satisfaction scale from 0 to 10, where 10 meant *extremely satisfied,* and 0 meant *not at all satisfied*. In CY 2025, across all nonresidential offerings surveyed, the participation-weighted average overall satisfaction rating was 9.5, consistent with the average ratings from the previous four years (9.3 to 9.4). Average ratings in CY 2025 ranged from 8.8 for New Construction Incentives up to 9.7 for Large Industrial, Agribusiness, and Schools and Government. There were no statistically significant differences in satisfaction ratings between CY 2024 and CY 2025. Figure 16 shows a comparison of the survey respondents' average satisfaction ratings with nonresidential offerings in CY 2025 and CY 2024.

Figure 16. CY 2025 Average Overall Satisfaction Ratings for Nonresidential Offerings



Source: Ongoing Participant Satisfaction Online Survey Question. "Overall, how satisfied are you with your most recent experience with Focus on Energy?" Business and Industry CY 2025 (n=101), CY 2024 (n=95); Schools and Government CY 2025 (n=114), CY 2024 (n=71); Large Industrial CY 2025 (n=66), CY 2024 (n=56); Agribusiness CY 2025 (n=19), CY 2024 (n=17); New Construction incentives CY 2025 (n=17), CY 2024 (n=3); The nonresidential portfolio average is the average of all programs surveyed during the year weighted by total program participation. None of the year-to-year differences is significant.
Textured bars represent results from fewer than 20 surveys; interpret with caution.

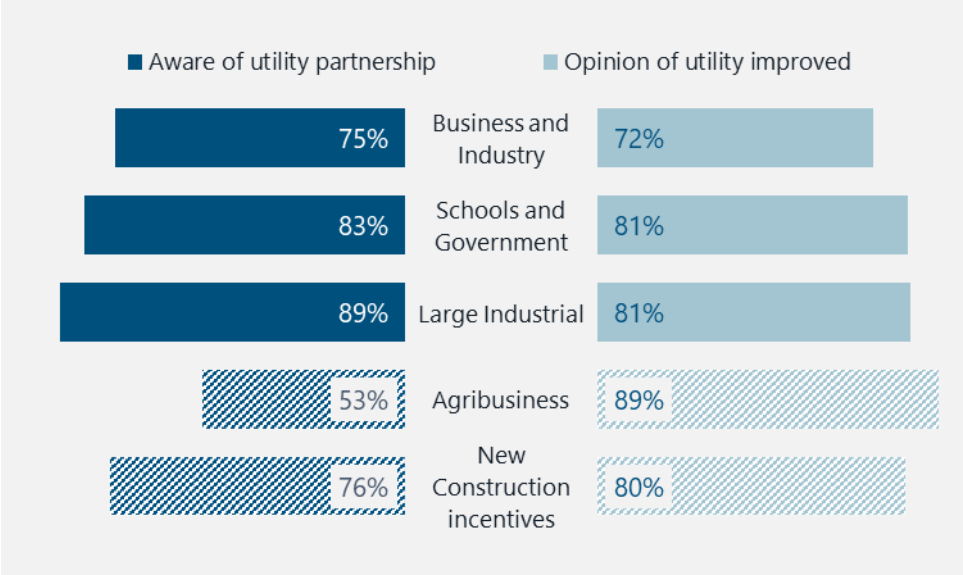
Net Promoter Score

The evaluation team calculated an NPS score for each offering based on the likelihood of the participant recommending it. Generally, a positive NPS score of +60 or better is interpreted as good, and the closer the NPS is to +100, the more favorable the respondents are toward the offering. All nonresidential offerings surveyed received a high NPS in CY 2025. The Large Industrial (+97), Schools and Government (+96), Agribusiness (+95), and Business and Industry (+88) offerings had the highest NPS scores, while the New Construction offering had the lowest (+76).

Awareness and Opinion of Utilities' Role

Most nonresidential survey respondents were aware that Focus on Energy programs were offered in partnership with their local energy utility, ranging from 53% of Agribusiness respondents to 89% of Large Industrial (Figure 17). Most respondents also reported that Focus on Energy offerings made their opinion of their utility *much more favorable* or *somewhat more favorable*, ranging from 72% of Business and Industry respondents to 89% of Agribusiness respondents.

Figure 17. Nonresidential Participants' Awareness and Opinion of Utility Partnerships with Focus on Energy



Source: Participant Satisfaction Survey Questions. "The Focus on Energy program you participated in is offered in partnership with your local energy utility. Before taking this survey, was this something you were aware of?" Business and Industry (n=101); Schools and Government (n=114); Large Industrial (n=66); Agribusiness (n=19); New Construction incentives (n=17). "How have these offerings affected your opinion of your energy utility, if at all?" Business and Industry (n=95); Schools and Government (n=108); Large Industrial (n=64); Agribusiness (n=18); New Construction incentives (n=15). Textured bars represent results from fewer than 20 surveys; interpret with caution.

Participant Recommendations

The evaluation team analyzed open-ended comments and suggestions made by satisfaction survey respondents. Most survey respondents' comments were complimentary or reported a positive experience with the offerings they participated in, including 92% (n=26) of Large Industrial comments, 80% (n=30) of Business and Industry comments, 89% (n=54) of Schools and Government comments, and one of three comments from Agribusiness respondents.

Across all 317 nonresidential satisfaction surveys completed in CY 2025, respondents' open-ended comments only included 16 suggestions for improvement. Respondents offered six suggestions apiece for improving the Schools and Government and Business and Industry Programs, and two apiece for improving the Agribusiness and Large Industrial Programs. The most frequent suggestions across all

nonresidential programs were to improve communication through more outreach and marketing (four suggestions) and to reduce delays in approval and payment of incentives (three suggestions).

The CY 2025 surveys included an open-ended question soliciting feedback about participants' experience with trade allies. Respondents' comments were mostly complimentary toward the trade allies, consistent with the high satisfaction ratings for trade allies. However, there were 15 suggestions for improvement: six each from Business and Industry and Schools and Government respondents, two from Large Industrial respondents, and one from an Agribusiness respondent. Five of the Business and Industry suggestions, along with one from a Large Industrial respondent and the Agribusiness respondent suggestion, related to improving the effectiveness, frequency, and timeliness of communications from contractors about projects. Three Schools and Government respondents suggested improving the professionalism of the installation staff. Three more respondents reported issues with their installations, such as leaking valves that needed fixing or power outages (one suggestion each from Large Industrial, Business and Industry, and Schools and Government respondents). One respondent suggested that their trade ally could have submitted the incentive application on their behalf, and one was satisfied with their installation but "not impressed" by the project's design.

Business and Industry and Large Industrial Participant Survey

The evaluation team conducted a survey in fall 2025 to assess the experiences of Business and Industry and Large Industrial participants with program communications. The evaluation team administered an online survey to the full population of Business and Industry and Large Industrial participants who completed projects during CY 2024 and CY 2025. Eighty Business and Industry and 25 Large Industrial participants completed the survey, for an overall response rate of 11%. The survey focused on four key areas of communication: communication channels, frequency, content, and effectiveness. The survey also explored energy advisor engagement and organizational decision-making processes.

Most participants reported satisfaction with the frequency of communications, with 90% of Business and Industry and 89% of Large Industrial respondents who recalled the frequency, reporting it was "just right." Email newsletters, energy advisor contact, and the Focus on Energy website were the most commonly reported program communications across both Business and Industry and Large Industrial participants. Large Industrial respondents were more likely to report their energy advisor as their most recent point of contact (71%) compared to Business and Industry respondents (28%). Respondents rated energy advisors and contractors highest for effectiveness.

The frequency of energy advisor contact correlated with company size. Half of respondents from companies with fewer than 10 employees reported never hearing from an energy advisor, compared to 10% of respondents from companies with 100 or more employees. Participants who work with energy advisors reported high satisfaction (85% *extremely* or *very satisfied*) and valued their guidance through the rebate process. However, Business and Industry participants rated contractors higher than energy advisors for educating them about energy efficiency technologies and identifying facility-specific opportunities.

Most respondents (86%) reported regularly or occasionally sharing Focus on Energy information with colleagues within their organizations. When asked what types of information would be most valuable to

their organizations, participants selected practical, action-oriented materials such as energy savings calculators (60%) and application or deadline reminders (48%). Out of the communication channels, email newsletters and the Focus on Energy website received the lowest ratings for interesting and engaging content (3.8 and 3.9 on a five-point scale, respectively). The newsletter also received the lowest rating for helping participants learn something new (3.9).

Trade Ally Interviews

The evaluation team conducted 25 interviews with participating trade allies in the Business and Industry, Large Industrial, Schools and Government, and Agribusiness programs. The team selected interviewees from a sample frame of 285 trade allies, sampling by measure category and engagement level. Among the interviewed trade allies, lighting represented the largest share (n=15), followed by renewables (n=4), mechanical (n=3), agriculture (n=2), and multi-measure trade allies (n=1).

Trade allies identified email as the most useful communication channel (23 of 25), and nearly all (22 of 23) described the amount of communication from Focus on Energy as "just right." Trade allies generally requested program updates at the beginning or end of the calendar year to inform business planning. Over half of trade allies (14 of 23) reported hearing from an energy advisor at least three times per year, while four never heard from one. Trade allies who received regular advisor outreach reported high satisfaction and cited the personalized outreach, deadline reminders, technical assistance, and program updates as the most useful aspects of energy advisor contact. Those without regular contact generally did not express a desire for additional outreach.

Trade allies described relying on program documents, such as the catalog and energy advisor outreach, rather than the website or newsletters. Most trade allies (22 of 25) visited the website infrequently, primarily to download workbooks, catalogs, and qualified product lists. Lighting trade allies reported improvements from recent application updates, noting that simpler forms and the shift of certain measures from custom to prescriptive pathways reduced documentation burden.

Nine trade allies had received the year-over-year report, and all recipients found it useful, with several using it as a marketing tool. Most trade allies reported limited awareness of co-branded materials, factsheets, videos, and toolkits.

3.6. Midstream/Instant Discount Process Evaluation Findings

The Instant Discount Program offers discounted equipment to residential and commercial customers who purchase qualifying residential-sized HVAC, commercial food service, or water heating equipment from a participating distributor. The program provides incentives to distributors for selling qualified equipment, and the distributor then passes the incentive to the end user, eliminating the need for the end user to submit a traditional rebate application. Distributors may receive a sales performance incentive fund (spiff) for participating in the discount process. Higher incentives and discounts are available to eligible limited-income customers who install HVAC equipment.

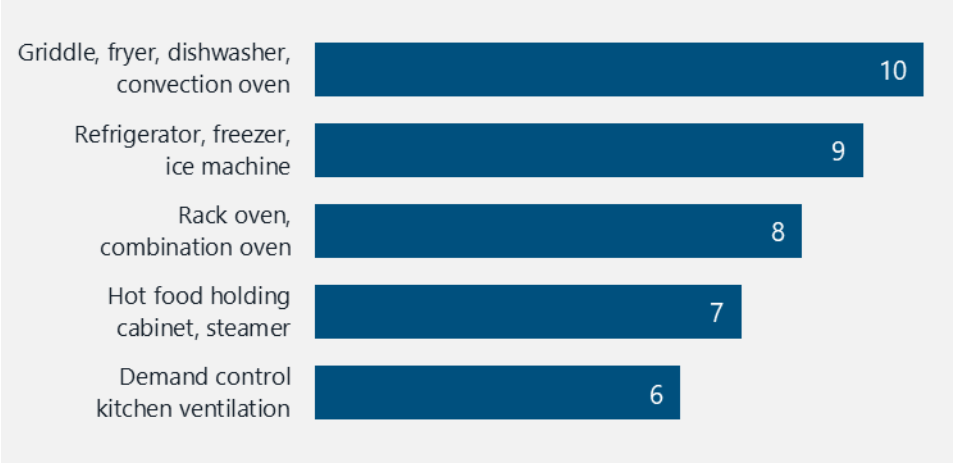
For the CY 2025 evaluation of the Instant Discount Program, the evaluation team conducted interviews and a customer survey to assess participants' experiences, expectations, and satisfaction with the program from the following market actors:

- Food service distributors (10 in-depth interviews)
- HVAC distributors (10 in-depth interviews)
- HVAC contractors (10 in-depth interviews)
- Heat pump customers (436 customer surveys)

Distributors and Contractors

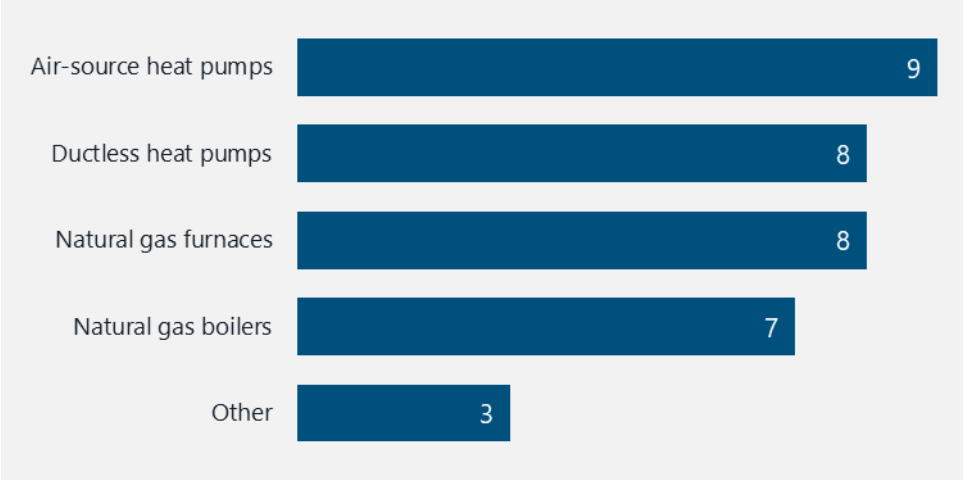
Food service distributors reported selling a variety of food service equipment. All 10 distributors interviewed sold griddles, fryers, dishwashers, and convection ovens. Each type of equipment listed in Figure 18 were sold by the majority of distributors, with the least frequently sold equipment being demand control kitchen ventilation, which was sold by six out of 10 distributors.

Figure 18. Equipment Food Service Distributors Sell



HVAC distributors also sold a variety of HVAC equipment. Nine of the 10 reported selling air-source heat pumps, and eight of the 10 sold ductless heat pumps and natural gas furnaces (Figure 19).

Figure 19. Equipment HVAC Distributors Sell



Program Experience

The evaluation team asked distributors and contractors about their familiarity and comfort level with eligible equipment. The survey presented all familiarity and comfort questions on a scale of 1 to 5, where 1 was *not at all familiar* or *not at all comfortable*, 3 was *neither familiar nor unfamiliar* or *neutral*, and 5 was *very familiar* or *very comfortable*.

Food service distributors generally had low familiarity with the benefits of energy-efficient kitchen equipment before participating in the program. Only four of 10 said that they were *somewhat familiar* or *very familiar*, and five of 10 thought that their staff was familiar with any benefits. Seven distributors thought their staff was comfortable selling high-efficiency equipment, whereas three distributors were unsure about their staff's comfort level selling program-eligible equipment.

HVAC distributors were more confident in their staff's familiarity with the benefits of eligible equipment compared to food service distributors. Seven of 10 HVAC distributors thought their staff was *somewhat familiar* or *very familiar*. Seven of 10 HVAC distributors also thought their staff were comfortable selling eligible heat pump equipment. Only one distributor thought their staff was *not too comfortable* selling heat pump equipment.

HVAC contractors reported high levels of comfort installing eligible heat pump equipment and high-efficiency gas equipment. Nine of 10 HVAC contractors were *very comfortable* (seven respondents) or *somewhat comfortable* (two respondents) installing heat pumps, and all 10 were either *very comfortable* (eight respondents) or *somewhat comfortable* (two respondents) installing high-efficiency gas equipment.

Program Expectations

The evaluation team asked distributors to identify the main benefits they expected from participating in the Instant Discount Program, allowing them to choose more than one answer.

Food service distributors were motivated by a variety of reasons to participate in the program. Six distributors said the main benefit they expected from participating in the program was to increase their sales of high-efficiency equipment. Four said to stay competitive in the market, three said the ability to provide discounts, and two said customer satisfaction/loyalty. When asked whether they were already experiencing those benefits in practice, seven food service distributors said yes. Two were new and said they had not participated in the program long enough to confirm, and one distributor did not respond.

HVAC distributors' expectations when enrolling in the program varied. Responses included uncertainty about the required level of effort, reduced workload for their account managers, and a desire for increased sales, especially furnaces. Three distributors said they were uncertain about participating, citing past experiences with the Midstream Program (one distributor mentioned issues with the website).

Program Satisfaction

The evaluation team asked distributors and contractors how satisfied they were with the level of communication and their overall experience with the Instant Discount Program.

Food service distributors were generally satisfied with the program. Seven of the 10 distributors said they were *very satisfied,* and the other three were *somewhat satisfied* with the program's level of communication. The evaluation team also asked distributors about their experiences with the training and marketing materials. Eight distributors said the distributor training and distributor process guides were *very easy* to understand. Five distributors said that submitting claims through the IRIS portal was *very easy,* and four said it was *somewhat easy*. Opinions on the marketing materials were far more mixed; only one distributor said they were *very helpful,* and three said they were *somewhat helpful*. In contrast, the other four distributors said the materials were *not helpful*. Regarding satisfaction with their overall experiences, six distributors reported being *very satisfied,* and four reported being *somewhat satisfied*.

HVAC distributors were also generally satisfied with the program. Seven of the 10 HVAC distributors were *very satisfied* with the program's level of communication, whereas one was *somewhat satisfied*. Two distributors were *neutral*, and one was *not at all satisfied*. The distributor, who was not at all satisfied, noted that Focus on Energy could be more diligent in responding to emails. Regarding overall satisfaction with the program, seven of nine distributors reported being *somewhat satisfied* or *very satisfied*, one was *somewhat dissatisfied,* and one was *neutral*.

HVAC contractor satisfaction with the program varied. Only two reported being *very satisfied,* and four were *somewhat satisfied*. Three distributors were either *somewhat* or *very dissatisfied* with the program, particularly the rebate levels offered.

Heat Pump Customers

Awareness and Motivation

To understand heat pump customers' awareness and motivations for purchasing new equipment, the evaluation team surveyed customers about why they installed new equipment, the top factors that motivated their purchase, and the resources they consulted prior to making a purchase.

Respondents (n=414) most frequently reported installing new equipment when their old system was working but aging (37%), followed by their old system was working, but inefficiently (17%), and their old system was not working and not repairable (15%). The most frequently cited motivating factors for purchasing a heat pump were saving energy (75% of participants), cash/rebate payment (60%), and reducing energy costs (56%). Respondents (n=387) were able to select multiple resources that they consulted before installing their heat pump, but the most cited resource was the HVAC contractor (68%), followed by manufacturer websites (34%), the Focus on Energy heat pump buying guide (33%), and consumer review sites (32%).

Experience and Benefits

The evaluation team assessed customer experiences and benefits by gathering information on how they learned to operate their heat pumps, the resources they consulted, the challenges they faced, their expectations prior to installation, and their overall satisfaction with their heat pumps.

Half of all respondents (n=405) reported no learning curve when using their heat pump. Among those who experienced a learning curve, 35% had to learn how to use the thermostat to control the temperature, and 26% had to learn how the system behaves in cold weather. Installers or contractors were the most frequently cited resources for learning how to operate the heat pump (82%), followed by a user manual (53%). Many respondents did not experience any challenges while operating the heat pump (60%; n=395); however, those who did cited confusion about settings or controls (14%), uneven temperatures across rooms (9%), and noise issues (9%). As far as expectations, most respondents (n=403) anticipated improved indoor comfort (68%) and a more environmentally friendly system (52%). The majority (n=406) said they were satisfied (90%), whereas only 5% were dissatisfied with their heat pump.

Equipment Switchover

Respondents most frequently reported installing heat pumps to address both heating and cooling (56%; n=412); however, in 23% and 5% of cases, they installed heat pumps to address cooling only and heating only, respectively. In 16% of installations, heat pumps did not replace any existing system. Central air conditioners (82%) were the most frequently replaced equipment, followed by natural gas furnaces (62%), room/window air conditioners (10%), and electric resistance heaters (5%). Regarding knowledge of outdoor switchover temperature, 73% (n=262) of respondents were aware of the outdoor switchover temperature setting, with contractors setting the switchover temperature in 78% of cases (n=248), but only 42% (n=230) said they would be able to adjust it.

Contractor Experience

Nearly all (98%, n=406) respondents said they had worked with a contractor to install their heat pump, and most found the contractor to be *very helpful* (60%, n=400) or *somewhat helpful* (26%) in deciding whether a heat pump was a good fit for their home, while 13% were *neutral*. The top three most frequently cited reasons for selecting a contractor were reputation or referral (66%), trustworthiness (58%), and technical knowledge (51%). The vast majority of heat pump installations (90%, n=397) were in single-family detached homes.

4. Cost-Effectiveness Findings

Prior to implementing Focus on Energy offerings, APTIM assessed the cost-effectiveness of the proposed designs using a cost-effectiveness tool that it developed in collaboration with the PSC and the evaluation team. Because consistency between planning and evaluation approaches is critical for understanding offering performance relative to expectations, in CY 2025, the evaluation team used Cadmus' in-house cost-effectiveness tool (EUROPA) to develop results and then confirmed them with the same calculator used by the PSC and implementer to evaluate cost-effectiveness.

As directed by the PSC, the modified TRC test is considered the primary test for assessing the cost-effectiveness of individual programs and offerings, as well as the entire Focus on Energy portfolio.[7] The PSC also directed that three additional tests be conducted for advisory purposes: an expanded TRC that includes net economic benefits, the Utility Administrator Cost Test (UAT), and the Societal Cost Test (SCT).

NTG ratios can significantly affect TRC, UAT, and SCT results. The evaluation team applied NTG ratios to impacts to measure the gains resulting from Focus on Energy activities. NTG ratios account for the energy savings that would have been achieved without the efficiency programs (when the NTG ratio is less than 1.0, savings are reduced; when the NTG ratio is greater than 1.0, savings are increased).

On the cost side, the team removed expenditures that would have occurred without the efficiency effort. These expenditures include incremental measure costs and lost revenues, both of which are multiplied by the NTG ratio. The evaluation team did not apply the NTG ratio to costs that would not have occurred in the absence of the program (such as program and administrative costs).

4.1. Test Description

To develop their cost-effectiveness calculators, the evaluation team and the administrator used methods adapted from and consistent with the California Standard Practice Manual, the original standard of cost-effectiveness analysis for energy efficiency programs in the United States,[8] along with the National Standard Practice Manual for Benefit Cost Analysis of Distributed Energy Resources.[9] The modified TRC is described below, and the detailed descriptions and results for the expanded TRC, the UAT, and the SCT are in Appendix J. Cost-Effectiveness and Emissions Methodology and Analysis in Volume III.

The TRC test is the most commonly used method for evaluating the cost-effectiveness of energy efficiency and renewable resource programs across the country. Applications range across states and utility

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7 Public Service Commission of Wisconsin. June 6, 2018. *Quadrennial Planning Process III – Final Decision*. PSC Docket 5-FE-101, PSC REF#: 343909. http://apps.psc.wi.gov/vs2015/ERF_view/viewdoc.aspx?docid=343909

8 California Public Utilities Commission. July 2002. *California Standard Practice Manual: Economic Analysis of Demand-Side Programs and Projects*. http://www.calmac.org/events/SPM_9_20_02.pdf

9 National Standard Practice Manual for Benefit-Cost Analysis of Distributed Energy Resources. August 2020. https://www.nationalenergyscreeningproject.org/national-standard-practice-manual/

jurisdictions, from the standard TRC test to the SCT, which expands the test inputs to provide a more holistic societal perspective. The TRC test includes total participant and administrator costs and estimates benefits in the form of avoided utility costs. Common modifications to the standard TRC test often involve reducing the discount rate or incorporating environmental and other non-energy benefits (such as emissions-reduction benefits). Wisconsin's version of the modified TRC test accounts for the standard TRC test costs and benefits and also includes monetized benefits from reduced emissions (carbon dioxide, sulfur oxide, and nitrogen oxide) due to saving energy.

In CY 2025, the evaluation team used the modified TRC test to determine whether the offerings were cost-effective from a regulatory perspective (as directed by the PSC) and, where feasible, measured the overall impacts of these offerings' benefits and costs on the State of Wisconsin. In general, the test compares all benefits and costs that can be measured with a high degree of confidence, including any net avoided emissions that have commission-established values. The test's purpose is to determine whether the total costs residents, businesses, and Focus on Energy incur for operating the offerings are outweighed by the total benefits they receive.

In simple terms, the benefit/cost value of the modified TRC test is the ratio of avoided utility and environmental costs from avoided energy consumption to the combination of administrative costs, delivery costs, and net participant incremental measure costs.

The benefit/cost equation used for the modified TRC test is:

$$TRC\frac{B}{C} = \frac{[Value\ of\ Gross\ Saved\ Energy + Value\ of\ Gross\ Avoided\ Emissions] * NTG}{[Administrative\ Costs\ +\ Delivery\ Costs + (Incremental\ Measure\ Cost\ * NTG)]}$$

Where:

$$Value\ of\ Gross\ Saved\ Energy = Evaluated\ Savings\ x\ Utility\ Avoided\ Costs$$

4.2. Interpreting Test Results

No single benefit/cost test can provide a comprehensive understanding of program performance or impacts in isolation. The results of tests that measure overall program cost-effectiveness, such as the modified TRC test, should be reviewed along with the results of other tests, such as the UAT. Such a multi-perspective approach warrants a clear understanding of the tradeoffs among the tests.

Because of changes in avoided electric energy and natural gas costs and in emissions allowance prices for Quadrennium IV, the cost-effectiveness results reported for Focus on Energy here are not directly comparable with results from the CY 2019-CY 2022 quadrennium. The changes to avoided costs decreased the benefit/cost test results across all offerings when compared with the avoided costs used in the previous quadrennium. This was particularly substantial for electricity generation and capacity benefits.

4.3. Value of Net Saved Energy

The value of energy saved, or displaced, equals the net energy saved multiplied by the utility-avoided cost of not having to generate or purchase that energy. In the case of energy efficiency and renewable resource programs, the avoided cost is the incremental (or marginal) cost for the additional energy and capacity the utility must generate or purchase rather than pay for the efficient measure that offsets the demand.

The PSC first established the methodology to estimate electric energy avoided costs in its June 18, 2012, Order in Docket 5-GF-191 (PSC REF#: 166932).[10] The PSC first established the methodology to estimate natural gas avoided costs in its February 25, 2015 Order in Docket 5-FE-100 (PSC REF#: 232431).[11] The PSC maintained the methodologies established under these Orders in its Final Decision for the Quadrennial Planning Process IV.[12]

The source of electric energy avoided costs in the CY 2025 evaluation comes from the annualized forecast avoided cost model developed by the evaluation team. This model relied on the Midcontinent Independent Transmission System Operator's locational marginal pricing for nodes in Wisconsin and on forecasts for 2032, 2037, and 2042.[13]

Avoided natural gas costs are calculated based on Energy Information Administration 2025 Annual Energy Outlook forecasts of Henry Hub prices, adjusted using Wisconsin City Gate prices and retail prices.

The PSC established the methodology to estimate avoided electric transmission and distribution (T&D) costs for the CY 2019-CY 2022 quadrennium, under PSC Docket 5-FE-101 (PSC REF#: 406591). The evaluation team calculated T&D costs using a running average of T&D infrastructure costs (as reported to the PSC) and then escalated this value to reflect projected increases in construction costs.[14]

To derive net savings, the evaluation team decreased the verified gross energy savings by the conventional attribution factor of the NTG ratio. The team then increased the net savings by a line loss

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[10] Public Service Commission of Wisconsin. June 18, 2012. *Quadrennium Planning Process II – Scope. PSC Docket 5-GF-191, PSC REF#: 166932.* http://psc.wi.gov/apps35/ERF_view/viewdoc.aspx?docid=166932

[11] Public Service Commission of Wisconsin. February 25, 2015. *Quadrennium Planning Process II – Scope. PSC Docket 5-FE-100, PSC REF#: 232431.* http://psc.wi.gov/apps35/ERF_view/viewdoc.aspx?docid=232431

[12] Public Service Commission of Wisconsin. November 14, 2022. Quadrennial Planning Process IV. Order PSC Docket 5-FE-104, REF#: 453081. https://apps.psc.wi.gov/ERF/ERFview/viewdoc.aspx?docid=453081

[13] Midcontinent Independent Transmission System Operator, Inc. Last updated 2019. "Day-Ahead Locational Marginal Pricing." https://www.misoenergy.org/markets-and-operations/real-time--market-data/market-reports/#t=10&p=0&s=MarketReportPublished&sd=desc

[14] Public Service Commission of Wisconsin. March 10, 2021. *Quadrennial Planning Process III.* Order PSC Docket 5-FE-101, REF#: 406591. https://apps.psc.wi.gov/ERF/ERFview/viewdoc.aspx?docid=406591.

factor of 8% to account for distribution losses. Table 21 lists the assumptions for the CY 2023, CY 2024, and CY 2025 evaluation avoided costs used for the cost-effectiveness tests.

Table 21. CY 2023, CY 2024, and CY 2025 Avoided Cost Comparison

Avoided Cost	CY 2023	CY 2024	CY 2025
Electric Energy ($/kWh)[a]	$0.0299–$0.0210	$0.0292–$0.0212	$0.0286–$0.0214
Electric Capacity ($/kW year)	$177.33–$194.34	$176.06–$196.46	$174.29–$198.61
Gas ($/therms)	$0.463–$0.621	$0.451–$0.628	$0.464–$0.635
Transmission and Distribution ($/kW year)	$49.25–$54.29	$48.98–$54.88	$48.78–$55.48
Avoided Cost Inflation	0%	0%	0%
Real Discount Rate	2%	2%	2%
Line Loss	8%	8%	8%

4.4. Emissions Benefits

The modified TRC benefit/cost calculations include the benefit of avoiding emissions of three air pollutants that are regulated under the Clean Air Act. These are carbon dioxide, sulfur dioxide, and nitrogen oxide. Determining the emissions benefits requires three key parameters: lifecycle net energy savings, emissions factors or a tool that uses emissions factors, and the dollar value of the displaced emissions.

Emissions factors are the rate at which the criteria pollutants are emitted per unit of energy generated and are most often expressed in tons of pollutant per energy unit. Electric is in tons/megawatt-hour (MWh), and gas is in tons/thousand therms (MThm). The product of the emissions factor and the net energy savings is the total weight of air pollutants offset or avoided by the program.

The product of the total tonnage of pollutant saved and the discounted annual dollar value of the reduced emissions per ton is, therefore, the avoided emissions benefit, as shown in this equation:

$$Value\ of\ Avoided\ Emissions = \sum_{Years=MeasureEUL}^{n} PV\left(Annual\ Emissions\ Factor * Annual\ Emissions * Annual\ Market\ Value\ of\ Emissions\right)$$

Where PV indicates a present value function that takes annual emissions results and the number of periods as inputs, and n indicates the count of unique measures installed within a particular offering.

For CY 2025, the evaluation team assessed the benefits of electric emissions for Focus on Energy using AVoided Emissions and geneRation Tool (AVERT), a tool developed by the Environmental Protection Agency (EPA) to calculate avoided emissions from renewable energy and energy efficiency programs. AVERT is a spreadsheet-based model that uses historical hourly generation and emissions data to determine the individual power plants that are likely to be displaced by energy efficiency or renewable energy during each hour of the year.

To calculate electric emissions benefits using AVERT, the lifecycle net electric savings for Focus on Energy needed to be attributed to an AVERT region. Previously, Wisconsin was divided into two regions; however, in 2020, the EPA revised its regional boundaries, and now Wisconsin falls into a single region.

Savings for Focus on Energy offerings are calculated using a region-specific version of AVERT to determine the electric emissions benefits per offering. AVERT uses a model from the previous year to compare the electricity generation avoided by the Focus on Energy offerings during each hour of the year with the hourly generation information to determine the amount of emissions displaced.

Table 22 lists the gas emissions factor and allowance prices. For CY 2025, the electric emissions scalar was 792 tons of carbon dioxide per GWh, which is unchanged from CY 2024.[15] Note that this can be used to estimate avoided tons of carbon from electric savings; however, it is not exact, will not apply to other years or regions, and will vary in its results based on the input GWh.

Table 22. Emissions Factors and Allowance Price

Service Fuel Type	Carbon Dioxide	Nitrogen Oxide	Sulfur Dioxide
Electric Emissions Factor (Tons/MWh)	0.792	0.0004	0.0005
Gas Emissions Factor (Tons/MThm)	5.85	N/A	N/A
Allowance Price ($/Ton)	$28.36	$8.50	$2.50

For CY 2025, as in previous years, the evaluation team continued to obtain allowance prices for nitrogen oxide and sulfur dioxide emissions from the EPA's Cross-State Air Pollution Rule, most recently updated in 2023.[16] The team used the carbon dioxide emissions price in the PSC's Order, docket 5-FE-104, PSC REF#: 487366, which states, "For the purposes of evaluating Focus in Quad IV, a starting point market-based value of $24.77 per ton of avoided carbon emissions is reasonable and in the public interest."[17] Further, this value will increase by 7% each year during Quadrennium IV, with a first-year value of $28.36 per ton in CY 2025.

The natural gas emissions factor has remained constant since the CY 2011 evaluation report and is derived from a best practice greenhouse gas inventory method developed by the California Energy Commission.[18]

Table 23 lists the total avoided emissions by gas type in tons for CY 2023, CY 2024, and CY 2025.

[15] The EPA has not updated the data used in AVERT since 2024. The most current version of the tool relies on data from 2017 through 2023. U.S. EPA. Accessed April 19, 2026, https://www.epa.gov/avert/avert-web-edition

[16] U.S. EPA. Accessed April 19, 2026. "Progress Report -Program Compliance and Market Activity." https://www.epa.gov/power-sector/progress-report-program-compliance-and-market-activity.

[17] Public Service Commission of Wisconsin. June 6, 2018. Quadrennial Planning Process IV. Order PSC Docket 5-FE-104, REF#: 487366. https://apps.psc.wi.gov/ERF/ERFview/viewdoc.aspx?docid=487366

[18] California Air Resources Board. 2019. *California Greenhouse Gas Emissions for 2000 to 2017.* https://ww3.arb.ca.gov/cc/inventory/pubs/reports/2000_2017/ghg_inventory_trends_00-17.pdf

Table 23. Total Emissions Benefits by Gas Type by Calendar Year

Year	Carbon Dioxide	Nitrogen Oxide	Sulfur Oxide
CY 2023 Tons of Emissions Avoided	6,844,843	2,437	3,006
CY 2024 Tons of Emissions Avoided	6,539,245	2,612	3,200
CY 2025 Tons of Emissions Avoided	6,262,340	2,319	2,842

Table 24 lists the emissions benefits for all programs by segment for CY 2023, CY 2024, and CY 2025.

Table 24. Total Emissions Benefits by Segment by Calendar Year

Year	Residential	Nonresidential	Midstream [a]	Total
CY 2023 Emissions Benefits	$48,554,654	$187,153,229	$9,005,016	**$244,712,899**
CY 2024 Emissions Benefits	$45,759,843	$202,928,978	$1,750,800	**$250,439,621**
CY 2025 Emissions Benefits	$64,030,700	$212,036,811	N/A	**$276,067,511**

a The Midstream Channel was not large enough in CY 2025 to be reported separately

4.5. Program Costs

The program costs represent all costs associated with running the efficiency and renewable programs (including administration and delivery costs). The evaluation team did not include incentive costs because they are considered transfer payments to the customer.[19] Focus on Energy's fiscal agent, Wipfli, provided the CY 2025 program costs used for this evaluation.

Table 25 shows the CY 2023, CY 2024, and CY 2025 sector cost values used for the cost-effectiveness tests.

Table 25. Sector Costs Comparison by Calendar Year

Costs	CY 2023	CY 2024	CY 2025 [a]
Residential			
Incentive Costs	$22,650,877	$21,993,126	$22,725,695
Administrative Costs	$1,089,405	$1,084,688	$1,193,586
Delivery Costs	$10,527,443	$11,744,165	$13,129,133
Total Residential Program Costs	**$34,267,726**	**$34,821,978**	**$37,048,414**
Nonresidential			
Incentive Costs	$28,712,721	$30,006,526	$35,392,358
Administrative Costs	$1,632,259	$1,473,074	$1,507,266
Delivery Costs	$20,066,587	$20,326,342	$22,516,578
Total Nonresidential Program Costs	**$50,411,566**	**$51,805,943**	**$59,416,202**
Midstream			
Incentive Costs	$3,744,005	$1,779,643	N/A
Administrative Costs	$180,821	$87,696	N/A
Delivery Costs	$1,760,187	$997,270	N/A
Total Midstream Program Costs	**$5,685,013**	**$2,864,609**	**N/A**

[19] The evaluation team included incentives as an incremental cost but not as a program cost.

Costs	CY 2023	CY 2024	CY 2025 [a]
Total Across Sectors			
Incentive Costs	$55,107,604	$53,779,295	$58,118,053
Administrative Costs	$2,902,485	$2,645,458	$2,700,851
Delivery Costs	$32,354,216	$33,067,777	$35,645,711
Total Program Costs	**$90,364,305**	**$89,492,530**	**$96,464,616**

[a] The Midstream Channel was not large enough in CY 2025 to be reported separately

4.6. Incremental Costs

The gross incremental costs are the additional costs incurred from purchasing efficient equipment over and above a baseline non-qualified product. The evaluation team derived the gross incremental cost values used in the CY 2025 evaluation from an incremental cost study conducted in collaboration with the administrator and implementers. The incremental cost study allowed the evaluation team to establish up-to-date incremental costs for all measures using the best available data, including historical Focus on Energy program data and independent research from other state programs. The gross incremental costs, similar to the energy savings used in the cost-effectiveness tests, required the application of attribution factors to account for freeridership.

As in the CY 2023 and CY 2024 evaluations, the team assigned actual CY 2025 project costs from the program tracking databases to the renewable energy projects. Table 26 shows the total net incremental measure costs used for the CY 2023, CY 2024, and CY 2025 cost-effectiveness tests.

Table 26. Net Incremental Measure Cost Comparison by Calendar Year

Costs	Residential	Nonresidential	Midstream
CY 2023 Incremental Costs	$93,683,658	$146,546,603	$6,383,948
CY 2024 Incremental Costs	$89,580,732	$144,716,580	$7,136,361
CY 2025 Incremental Costs	$101,733,939	$155,713,655	N/A

Table 27 lists CY 2025 incentive costs by sector, with renewables incorporated.

Table 27. CY 2025 Incentive Costs by Sector (with Renewables Incorporated)

Costs	Residential	Nonresidential	Total
Incentive Costs	$22,725,695	$35,392,358	$58,118,053

Table 28 lists the findings of the benefit/cost analysis for Focus on Energy's CY 2025 programs by portfolio component.

Table 28. CY 2025 Benefit and Costs Portfolio Breakout

Focus on Energy Benefits and Costs	Full Portfolio	Core Programs Alone	Renewables Alone
Incentives	$58,118,053	$55,330,932	$2,787,121
Modified TRC Benefits ($ millions)	$705,244,292	$597,483,010	$107,761,281
Modified TRC Costs ($ millions)	$295,794,156	$211,616,557	$84,177,599
Portfolio Modified TRC Ratio	**2.38**	**2.82**	**1.28**

Table 29 lists the findings of the benefit/cost analysis for Focus on Energy's CY 2025 programs by sector.

Table 29. CY 2025 Costs, Benefits, and Modified Total Resource Cost Test Results by Sector

	Residential	Nonresidential	Renewables	Total
Administrative Costs	$1,137,453	$1,434,085	$129,313	$2,700,851
Delivery Costs	$12,511,688	$21,423,358	$1,710,665	$35,645,711
Incremental Measure Costs	$58,253,744	$116,856,229	$82,337,621	$257,447,594
Total Non-Incentive Costs	**$71,902,884**	**$139,713,673**	**$84,177,599**	**$295,794,156**
Electricity Benefits (kWh)	$9,717,867	$83,433,836	$18,334,786	$111,486,489
Capacity Benefits (kW)	$23,619,199	$87,326,816	$32,218,967	$143,164,983
Gas Benefits	$46,226,228	$87,248,817	$0	$133,475,045
Emissions Benefits	$45,836,410	$182,233,753	$47,997,348	$276,067,511
T&D Benefits (kW)	$6,771,515	$25,068,569	$9,210,180	$41,050,264
Total TRC Benefits	**$132,171,219**	**$465,311,792**	**$107,761,281**	**$705,244,292**
TRC Benefits Minus Costs	**$60,268,335**	**$325,598,119**	**$23,583,682**	**$409,450,135**
TRC Benefit/Cost Ratio	**1.84**	**3.33**	**1.28**	**2.38**

Table 30 lists CY 2023, CY 2024, and CY 2025 portfolio cost-effectiveness results for the modified TRC. Two sets of results are included for each year: one with renewables included in the core channels (residential, nonresidential, and midstream) and one with renewables as a stand-alone channel.

Table 30. Cost-Effectiveness Results for Focus on Energy Portfolio by Calendar Year

Calendar Year	Test	Residential	Nonresidential	Midstream	Renewables	Total
CY 2023	Modified TRC, renewables in core channels	1.37	3.28	3.59	N/A	**2.58**
CY 2023	Modified TRC, renewables as stand-alone channel	1.74	3.63	3.59	1.57	**2.58**
CY 2024	Modified TRC, renewables in core channels	1.34	3.21	0.95	N/A	**2.45**
CY 2024	Modified TRC, renewables as stand-alone channel	1.75	3.60	0.95	1.23	**2.45**
CY 2025	Modified TRC, renewables in core channels	1.49	2.96	N/A	N/A	**2.38**
CY 2025	Modified TRC, renewables as stand-alone channel	1.84	3.33	N/A	1.28	**2.38**

The PSC directed Focus on Energy to perform additional benefit/cost tests for informational purposes:

- The expanded TRC has the same inputs as the modified TRC, presented above, plus net economic benefits.
- The UAT measures the net benefits and costs of the programs as a resource option from the perspective of the Focus on Energy administrator.
- The SCT has the same inputs as the expanded TRC, plus non-energy benefits.

Table 31 lists the CY 2025 portfolio-level cost-effectiveness results for these additional test perspectives.

Table 31. CY 2025 Portfolio-Level Cost-Effectiveness Results for Additional Benefit/Cost Tests

Test	Residential	Nonresidential	Renewables	Total
Expanded TRC				**3.57**
UAT	2.45	5.01	12.92	**4.45**
SCT	2.22	3.95	1.42	**3.99**

The inclusion of economic benefits in the expanded TRC produces higher benefit/cost ratios than the portfolio-level modified TRC results. For the UAT, the results show that benefits from the residential programs are just more than twice the costs, while the benefits from the nonresidential programs outweigh the costs by nearly a factor of six. The SCT delivered benefits just above four times the costs.

For additional details on the different benefit/cost test results and processes used for calculating the cost-effectiveness of the Focus on Energy portfolio, please refer to Appendix J. Cost-Effectiveness and Emissions Methodology and Analysis in Volume III.

5. Key Performance Indicators Achievement

The program administrator's contract requires the evaluation team to assess and report findings from six KPIs at various points throughout Quadrennium IV. Those KPIs are related to achieving MMBtu goals, maintaining high customer satisfaction, ensuring equity of incentive spending across investor-owned utilities, increasing the number of applications from income-qualified customers, ensuring rural customers receive a proportional share of incentives, and increasing energy savings in underserved census tracts. For most KPIs, the administrator is eligible for a higher bonus amount for meeting higher KPI thresholds. For certain KPIs, the program administrator is subject to financial penalties for failure to achieve minimum performance thresholds.

In CY 2025, the evaluation team only verified the KPI related to customer satisfaction. The program administrator is eligible for a performance bonus if they meet the KPI target threshold based on verified CY 2025 results. The evaluation team's verification results indicate that the program met the KPI target thresholds in CY 2025.

Table 32 presents a brief description of the customer satisfaction KPI that the evaluation team verified for CY 2025, the KPI target threshold, and the evaluation team's verification findings.

Table 32. Quadrennium IV Key Performance Indicators and Verified Results for CY 2025

KPI	Description	KPI Target Thresholds	Verified Results
Customer Satisfaction	Maintain high customer satisfaction at the portfolio level	50% of bonus ≥9.0 75% of bonus ≥9.1 100% of bonus ≥9.2	Participation-weighted average satisfaction across the portfolio was 9.4 in CY 2025.

6. Outcomes and Recommendations

Based on the evaluation team's findings, this section presents high-level outcomes and recommendations. The team synthesized information from all CY 2025 evaluation activities to inform the following portfolio-level outcomes and recommendations. More information on supporting findings can be found in this report and in the program chapters in Volume II.

Outcome 1. Participants continued to report high levels of satisfaction with Focus on Energy offerings. Overall, CY 2025 respondents gave the offerings they participated in an average satisfaction rating of 9.4, consistent with average ratings of 9.5 or 9.4 for the portfolio every year since CY 2020. Every program surveyed in CY 2025 had an average customer satisfaction rating of at least 9.2, except Nonresidential New Construction, which only had 17 respondents.

6.1. Residential

Outcome 1. Overall participation increased, and customers demonstrated added engagement in CY 2025. Evidence of increased participation and engaged residential customers was found specifically in Residential New Construction and Trade Ally Solutions programs. For Residential New Construction, the number of ENERGY STAR homes increased by 34% from CY 2024 to CY 2025, with two homes certified at the Zero Energy Ready level in CY 2025, compared to zero in CY 2024. For Trade Ally Solutions, the majority of participants reported paying close attention to their home's energy use, planned on making additional efficiency improvements, and believed it was important to conserve resources and save energy.

Recommendation 1. Leverage participation and engagement in residential programs, particularly Residential New Construction and Trade Ally Solutions, to promote and encourage participation in other Focus on Energy programs. Consider asking participants to share success stories or testimonials and post them on the Focus on Energy webpage. Additionally, consider coordinating with utilities to increase awareness of other programs by providing customers with information and materials to educate themselves on a wide range of energy-saving topics and trends.

Outcome 2. Customers expressed high levels of satisfaction with the smart thermostats they installed through Focus on Energy residential programs. Almost all participants in the Trade Ally Solutions program reported being highly satisfied with their Retail Smart Thermostat, reported using them for both heating and cooling, and found the installation and rebate application processes easy to navigate. Income-qualified direct install participants (i.e., Direct to Customer) were also largely satisfied with the thermostats and the Focus on Energy website as a resource for learning how to order and install their thermostats.

Outcome 3. Savings increased, and realization rates were generally strong in CY 2025. Strong performances in savings and realization rates indicate that Focus on Energy's residential programs are working as intended. For the Residential New Construction program, savings per program home have steadily increased since CY 2019 and have continued to do so in CY 2025. Program realization rates in the Renewable Rewards and Direct to Customers programs were positive; however, additional reviews of project files and measure data could improve measure-level accuracy.

Recommendation 3. To ensure accuracy in savings estimates, review project files, project documentation, and measure values thoroughly when approving projects.

6.2. Nonresidential

Outcome 1. Program communications are well received by both participants and trade allies and contact with energy advisors is more common among larger participants. Both participants and trade allies reported satisfaction with the frequency and channel of Focus on Energy communications. Among participants, most Business and Industry and Large Industrial respondents were satisfied with the frequency of communications, and nearly all trade allies described the amount of communication in the same way. The frequency of energy advisor contact correlated with company size among participants: respondents from companies with fewer than 10 employees heard from an energy advisor less frequently than those from companies with 100 or more employees. Large Industrial participants were more likely to report their energy advisor as their most recent program communication than Business and Industry participants, consistent with Focus on Energy's existing strategy of energy advisor engagement for larger accounts.

Recommendation 1. Consider broadening access to the program's most effective communication channels to strengthen program engagement. This could be implementing proactive, low-effort outreach to Business and Industry participants who lack energy advisor relationships. A strategy of one or two annual email touchpoints could ensure smaller customers know they have an assigned energy advisor, understand how to access support, and receive alerts when new program offerings match their profile. For trade allies, consider expanding the year-over-year reports beyond top-performing trade allies to a broader distribution. Recipients found the year-over-year report useful, and several used it as a marketing tool.

Outcome 2. Energy advisors are highly valued by both participants and trade allies for helping navigate the program. Participants who work with energy advisors reported high satisfaction, and trade allies cited personalized outreach, deadline reminders, technical assistance, and program updates as the most useful aspects of advisor interactions. However, Business and Industry participants rated contractors higher than energy advisors for educating them about energy efficiency technologies and identifying facility-specific opportunities.

Recommendation 2. Consider adding or increasing energy advisor training on emerging technologies and identification of facility opportunities. Strengthening energy advisors' technical knowledge could help them add more value during their less frequent interactions with Business and Industry customers.

Outcome 3. Participants and trade allies expressed more interest in practical tools than general program information. Participants selected practical, action-oriented materials, such as energy-savings calculators and application or deadline reminders, as the most valuable types of information. Email newsletters and the Focus on Energy website received the lowest ratings for interesting and engaging content. Trade allies described relying on the catalog and energy advisor outreach as primary information sources rather than the website or newsletters.

Outcome 4. Program communications reach stakeholders beyond the primary point of contact, including other staff. Most participants reported regularly or occasionally sharing Focus on Energy information with colleagues within their organizations.

Recommendation 4. Prioritize development of practical, shareable resources, including quick-reference sheets (project category lists with typical incentive ranges), savings calculators for common measures, and condensed program summaries. Ensure these resources are useful not only to the primary program contact but also to colleagues who may receive them through internal sharing. Integrate these tools into existing communication channels such as newsletter links, website features, and energy advisor handouts rather than creating additional materials for customers to review.

Outcome 5. Application simplification has helped lighting trade allies. Lighting trade allies reported that simpler forms and the shift of certain measures from custom to prescriptive pathways reduced documentation burden.

Recommendation 5. Continue application reviews outside of lighting by exploring opportunities to shift additional measures from custom to prescriptive and reviewing documentation requirements. Explore whether the administrative burden of existing applications, combined with certain incentive levels, may prevent trade allies from recommending qualified equipment or installing equipment to the program's specifications.

Outcome 6. In prior years, the evaluation team identified instances of project data discrepancies in EDA/EDR measures, specifically where the verification report specifications often differed from model input parameters for EDA/EDR projects. The evaluation team met with the implementation team in early 2025 to discuss EDA/EDR project sequencing, output documentation, and the process for updating design documents to reflect final as-built parameters. The evaluation team found far fewer discrepancies amongst the final design documentation submitted for EDA/EDR projects in CY 2025.

6.3. Midstream/Instant Discount

Outcome 1. Food service distributors' familiarity with the benefits of energy-efficient equipment increased after participating in the program. Before entering the program, food service distributors had relatively low awareness of such benefits; however, after participation in the program, their awareness increased. Food service distributors also reported being comfortable selling eligible high-efficiency equipment after participating in the program.

Recommendation 1. During monthly visits, continue to remind food distributors of available resources, such as training webinars and FAQs, to reinforce their confidence and willingness to promote efficient equipment.

Outcome 2. Contractors perceive that customers are more comfortable adopting high-efficiency gas equipment and less comfortable switching from gas to electric equipment. HVAC contractors reported that customers with gas equipment are more inclined to adopt efficient gas equipment than to switch fuels (i.e., gas to electric).

Recommendation 2. Develop electrification-focused sales tools through the midstream channel to target fuel-switching opportunities and address the comfort gap held by customers. Equip contractors and distributors with customer-facing materials, such as simple scripts, FAQs, and visuals, to address common concerns about electrification and fuel substitution processes.

Outcome 3. There is a disconnect between HVAC distributors' perceptions of contractor readiness to install heat pumps and contractors' perceptions of their own capacity to do so. Distributors tend to underestimate contractors' readiness to install heat pumps; contractors report being ready and comfortable installing them. This perception gap could be problematic if distributors are reluctant to promote heat pumps to contractors because they believe contractors are not ready to install them. Contractors strongly influence customers' understanding and decision-making about installing heat pumps, but if they lack support from distributors, their ability to promote and install heat pumps may be somewhat compromised.

Recommendation 3. Leverage the Instant Discount Program to align distributors and contractors' readiness and implement key sales education materials to strengthen distributors' confidence in contractors' abilities and their willingness to promote and sell heat pumps. Distributors and contractors should work together to ensure that they are aligned on the most up-to-date information and installation practices when addressing customers about heat pump technology, available rebates, and federal tax credit eligibility. By doing so, distributors and contractors could develop a stronger working relationship in which both would increase their trust and confidence in each other, ultimately leading to more effective promotion of heat pump technologies.

Outcome 4. Customer satisfaction with their heat pump was high. Most customers reported lower seasonal energy bills, while relatively few reported bill increases after installing a heat pump.

Recommendation 4. Develop a "Bill Impacts at a Glance" one-page flyer for distributors and contractors that summarizes bill impacts in plain language and uses graphics to provide easy-to-read and understand content that explains typical bill outcomes for common situations (e.g., by home type, fuel, or usage). Be sure to make this information easily accessible to contractors and customers by promoting and marketing directly to them. This strategy could be used as an additional selling point to encourage customers to purchase heat pumps.

Outcome 5. Many customers lack knowledge of how to adjust switchover temperature settings, even though most recall a contractor explaining the process to them.

Recommendation 5. Encourage contractors to provide additional end-user education on the switchover temperature and its impact on energy usage. Consider creating educational materials to include in the toolkit. Emphasize education on switchover temperatures to enhance customer awareness and confidence in their ability to adjust settings as needed.

6.4. Cost-Effectiveness

Outcome 1. The Focus on Energy remained highly cost-effective in CY 2025, consistent with its performance in CY 2023 and CY 2024. The Focus on Energy portfolio remained stable and highly cost-effective in CY 2025, delivering $2.38 in benefits for each dollar of participant and administrator costs compared to $2.58 in CY 2023 and $2.45 in CY 2024. When accounting for downstream economic benefits, the CY 2025 portfolio was even more effective, delivering $3.57 per dollar of participant and administrator costs. After including non-energy benefits through the societal test, the program delivered $3.99 per dollar of participant and administrator costs.

Outcome 2. Nearly all programs in both the Residential and Nonresidential portfolios delivered more than $1.00 in benefits for every dollar of participant and administrator costs There were only two program offerings, excluding pilots—Residential Renewable Rewards and the Trade Ally Solutions, Tribal channel—that did not pass the modified TRC threshold of 1.0. The primary driver of lower cost-effectiveness in the Residential Renewable Rewards program is the relatively high per-unit incremental measure costs compared to electric energy savings (solar PV measures do not generate natural gas benefits). Since the Tribal offering provided support to that specific community for reasons beyond energy savings, it is not expected to pass the traditional cost-effectiveness test parameters. Similarly, the Community Impact Pilot did not pass the modified TRC, but pilot programs are generally not expected to pass traditional cost-effectiveness test parameters.

Recommendation 2. Continue to explore alternative cost-effectiveness testing frameworks for beneficial electrification measures, such as heat pumps and solar PV panels, that would align with PSC goals for electrification benefits not fully captured by the modified TRC.