DRCOG Secondary Research

Executive Summary

AGENDA

Building Decarbonization Goals

Current Challenge:

- Environmental and infrastructure crisis rooted in building-related greenhouse gas (GHG) emissions, outdated technologies, and structural inequities in energy access

Business Goals:

- Reduce GHG Emissions at Scale
- Expand Workforce Readiness
- Create a Replicable Policy Framework

DRCOG Decarbonization

KARSH·HAGAN

Incentives

Why?

Helps Buy a Heat Pump

How?

Makes it Cheaper

What?

- 1 Incentive Platform
- Regional Approach
- 1,600 Free Upgrades for Low-income Homes
- Education
- Pilot Programs

Workforce

Why?

Fill the Trades Gap

How?

Training and Jobs

What?

- 3,800 New workers
- Advising and Support for Contractors
- Increased Access to Quality Jobs
- Reducing Barriers to Economic Mobility

Building Policy Collaborative

Why?

Standardize Building Policy

How?

Local Support: Money and Time

What?

- $34.8 million To Local Governments (DRCOG)
- Peer-to-Peer Learning
- Research on Beneficial Electrification
- Regional Policy Roadmap
- Policy Implementation Support

Communication, Engagement, Website

01

MARKET RESEARCH OVERVIEW

Market Research Phases

PHASE 1

Baseline Understanding May-July 2025

Inform brand, personas, and preliminary campaign.

PHASE 2

Localized Understanding Aug-Nov 2025

Inform refined messaging & campaigns (e.g. audience-specific)

PHASE 3

Ongoing Understanding Jan 2026 +

To assess campaign effectiveness and inform continual refinement.

Phase 1 Research

	GROUP 1: Low-income Homeowners	GROUP 2: Pragmatic Homeowners
Objectives	Messaging	Messaging
Methodology	Resident Advisory Group (Focus Group	Online digital survey (e.g. Remesh)
Sample	8-12 CBOs, Neighborhood Groups	150 survey participants representing residents of diverse DRCOG geographies, gathered via 2 online focus groups

Phase 1 Research

	GROUP 3: Building Owners & Managers	GROUP 4: Contractors & Workforce
Objectives	Messaging Stakeholder Map	Messaging Stakeholder Map
Methodology	1-1 Virtual Interviews	1-1 Virtual Interviews
Sample	5-12 interviewees representing diverse building owners/managers (e.g., commercial, multifamily, industrial, etc.) and diverse DRCOG geographies	3-8 interviewees representing contractors, trade schools, workforce development programs, post-incarceration reentry programs and diverse DRCOG geographies

Literature Overview

- **Over 100** national, international, and regional program reports & studies
  - Many studies from peer-reviewed journals
  - Mix of meta analyses, primary research, program reports, and case studies
- Prioritized research on heat pumps, building electrification, and energy efficiency; also assessed research on EVs and water conservation

Literature Overview

- Documented mindsets; values; perceptions; awareness; motivators; barriers; messaging levers, channels, and key learnings; and trusted messengers
- Used Google, Google Scholar, ScienceDirect & Elsevier to identify relevant literature
- Used ChatGPT in some instances to facilitate synthesis

Campaign Overview

- Reviewed **~50 national, international, and regional campaigns**
- Prioritized review of campaigns for building electrification & energy efficiency; also assessed some for EVs & water conservation
- Documented **campaign name & tagline**; languages; **motivators, barriers** & messaging levers applied; and any published results or **key learnings**, including unintended consequences
- Used Google to identify relevant campaigns
- Used ChatGPT to identify some campaigns and in some instances, to facilitate synthesis

02

KEY LEARNINGS

Overall Summary – All Target Audiences

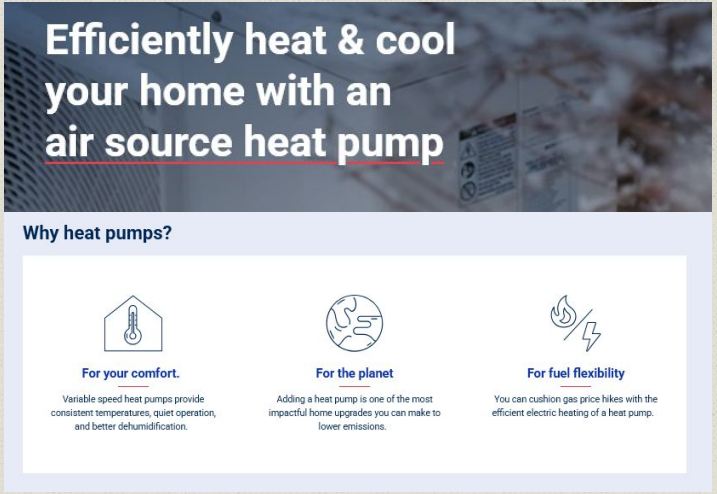
Element	Key Insights
Framing	Focus on benefits first. Simplify choices.
Language	Use everyday, non-technical terms and simple language.
Motivators	Cost, efficiency, comfort, health, environment, peer influence.
Barriers	Cost, complexity, lack of awareness, inertia/behavioral resistance, risk aversion, performance/reliability, lack of qualified installers.

Overall Summary – All Target Audiences

Element	Key Insights
Messengers	Contractors, utilities, peers, local organizations, local government.
Visuals	Use real-life product images (e.g., heat pumps), rather than illustrations or lifestyle shots. Avoid high-tech imagery.

Anchor in Personal Benefit

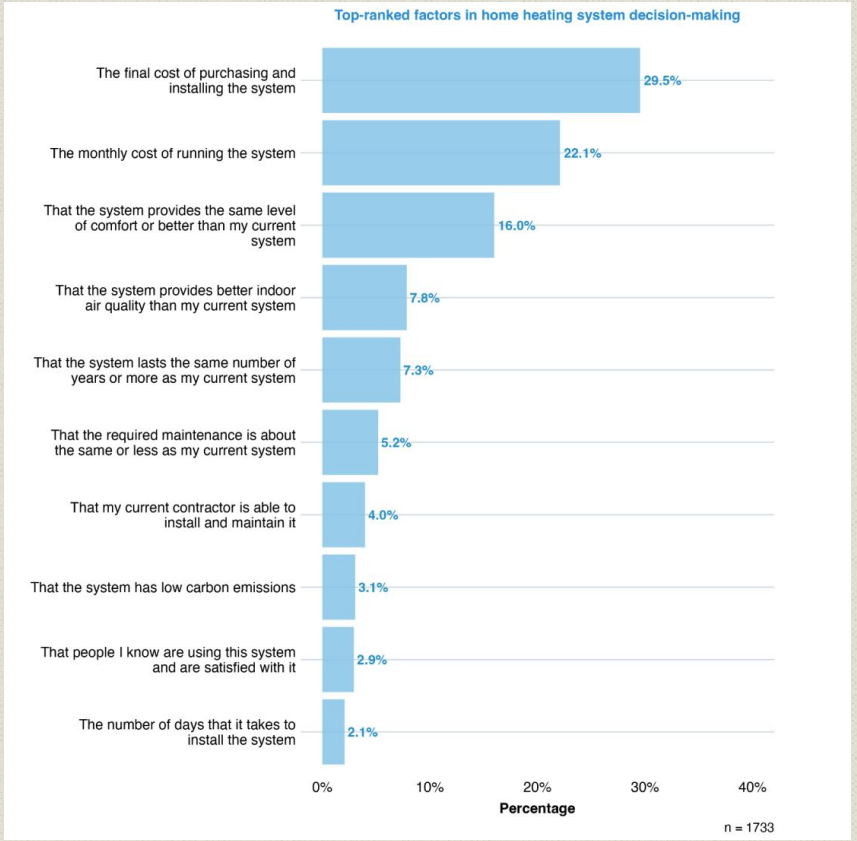
- Lead with: Cost savings, comfort, health, efficiency
- Avoid creating misperceptions of cost savings (i.e., energy savings vs. cost savings)
- Position environmental impact as a co-benefit



Low-income: Lead with affordability, minimizing energy burden (present & future), & equity

Cost is the Top Factor

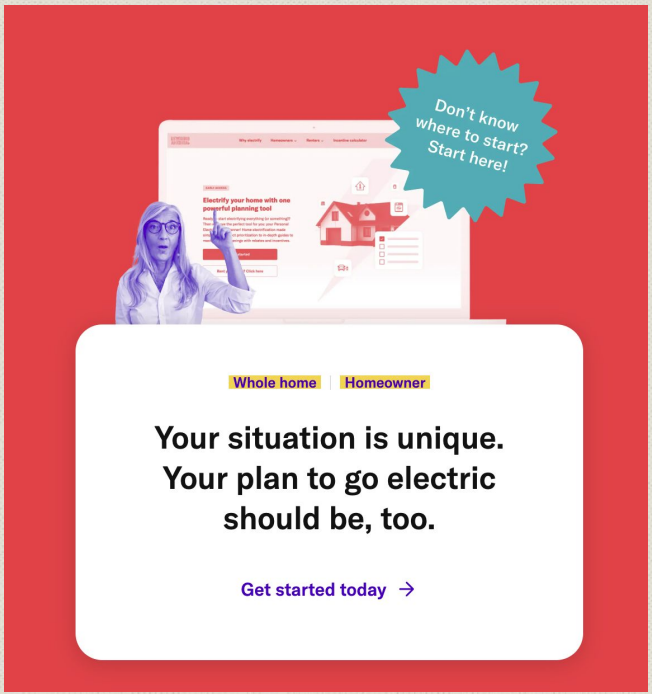
When it comes to home heating system decisions, people – even those who identify as eco-conscious – **prioritize** price & cost of running the system.



Source: Center for Energy & Environment, Minnesota 2004

But it isn’t always cheaper…

- **Cost barriers** include upfront equipment costs, electricity costs, and uncertainty about future electricity costs.
- **Avoid misleading consumers about the cost benefit** as negative experiences could lead to unintended consequences that slow the transition.



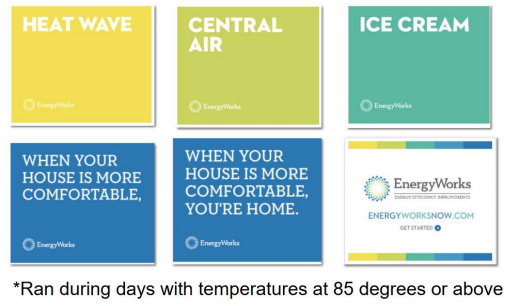
NOTE: How do we tell a nuanced cost benefit story, but simply?

Define the customer journey

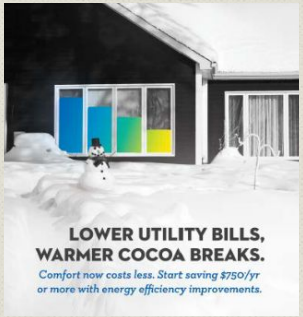
What are the key steps in heat pump adoption?

Awareness	Education	Adoption
Communicate the benefit with social proof.	Provide more detailed information on the benefits	Provide services on how you can see if these benefits fit your personal circumstances.

Example Campaign Journey



*Ran during days with temperatures at 85 degrees or above



Awareness

Energy efficiency can make your house more comfortable.

Education

Comfort now costs less, start saving $750/yr or more with energy efficient improvements.

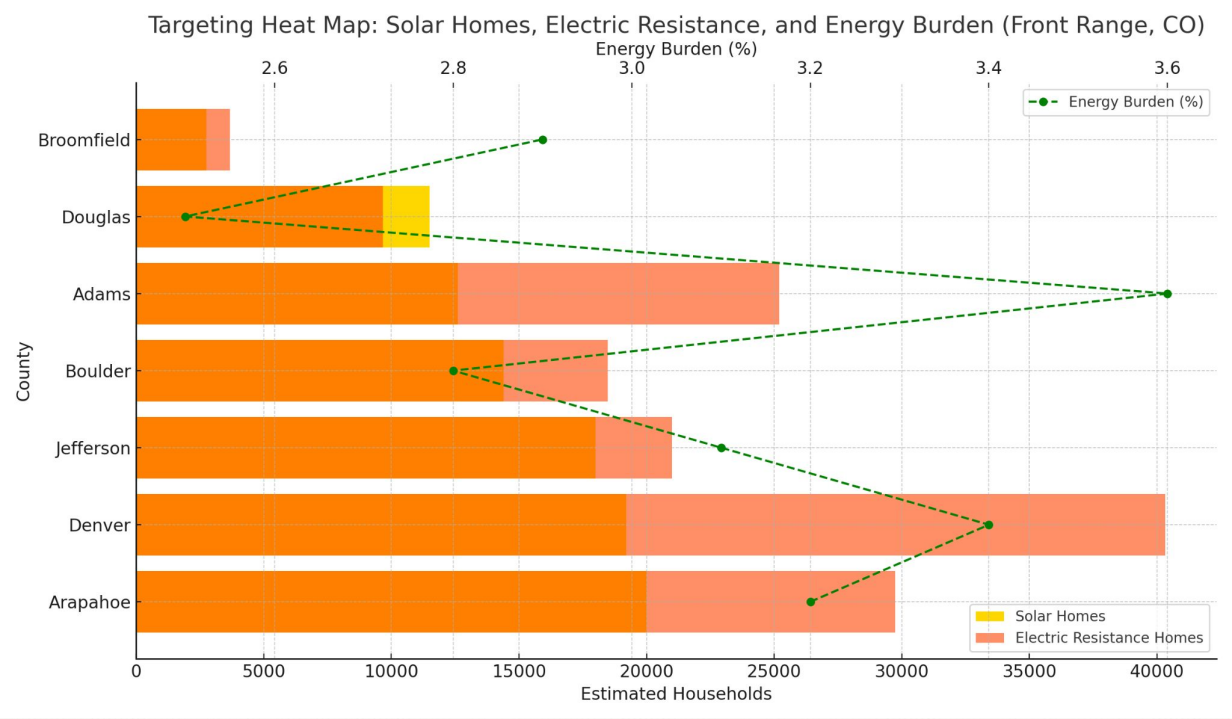
Adoption

Book a home energy assessment to see how you live more comfortably, save energy & money.

Targeting

- Heat pump adoption is notably higher in regions with low electricity prices.
- Adopters of solar are more likely to upgrade to a heat pump, in part because of electricity costs.
- Studies recommended targeting households that already use **electric resistance heating systems** and **propane users,** as they likely to realize cost savings. (CEE, 2024)

Solar, Electric Resistance & Energy Burden in Front Range, CO



Source: Estimate based on US Census ACS (2022) and EIA RECS (2020), DOE Lead

Address Barriers Directly

- **Common barriers:** Cost, complexity, lack of awareness, inertia/behavioral resistance, risk aversion, performance/reliability
- Simultaneously **amplify motivators & mitigate barriers**
- **Reduce resistance first** before amplifying benefits

NOTE: We need to ground-truth statements about cost, ease, and comfort before leaning in.

Citation: Claudy, M.C., Garcia, R. & O'Driscoll, A. Consumer resistance to innovation—a behavioral reasoning perspective. J. of the Acad. Mark. Sci. 43, 528–544 (2015). https://doi.org/10.1007/s11747-014-0399-0

Example: Electrify America's "Normal Now"

Audience Messaging Needs

	Low Income Homeowners
Insights	"I just want my energy bills to go down and stay down. It’s hard keeping the house warm and the lights on. If there’s a safe way to make things more affordable—and fair—I’m open to learning."
Messaging	**Relieve the energy burden**

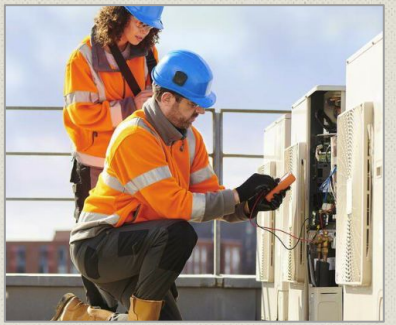
Audience Messaging Needs

	Pragmatic Homeowners
Insights	“If electrification means more control, lower bills, and at least the same level of comfort I have now, I’ll consider it—but it has to pencil out and be worth the switch.’
Messaging	**Upgrade - control energy use and the bills**

Audience Messaging Needs

	Building Owners & Managers
Insights	"I care about operational costs and tenant satisfaction. If I have proof that electrification boosts ROI, cuts maintenance headaches, works for my building, and helps retain tenants, it's something I'll explore."
Messaging	**Tenant retention, ROI & reliability**

Audience Messaging Needs



	Contractors
Insights	"Customers are starting to ask about heat pumps and electric upgrades. I want to stay ahead of the curve, but I also need to know it’s doable, profitable, and worth offering."
Messaging	**Meet customer demand with ease**

Perceptions – Electrification

Pragmatic Homeowners

- See electrification as **modern**, **efficient**, and potentially **cost-saving**
- **Skepticism about performance** and reliability compared to gas
- **Mixed attitudes toward climate** benefits – more motivated by practical advantages
- May perceive electrification as **complex** or **disruptive**

Perceptions – Electrification

Low Income Homeowner

- Perceive electrification as **expensive** or **out-of-reach** due to upfront costs
- Concerned about **higher bills** if rates not designed equitably; **replacement costs** if equipment has limited life
- May view electrification as **policy for others**, not personal
- **Less likely to associate** electrification with comfort or direct benefits and immediate benefits are a deciding factor.

Consumer Mindset Segmentation

Sustainability segments

Planet Protectors
Engaged environmentalists, happy to pay more for products that are good for the environment, interested in issues related to sustainability

28%

Price Point Green
Caring about the environment and making an effort to protect it, but price remains the key factor in their purchase decisions

20%

Green When Keen
Recognize that climate change is a problem, agree we should do more to protect the environment, but sustainability is not entrenched in their lifestyle

14%

On The Green Fence
Unconcerned and disengaged; uninterested in sustainability issues

17%

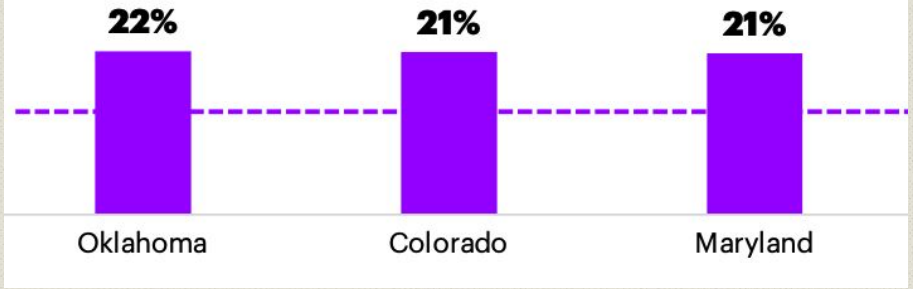
Green Rejecters
Negative views on environmental sustainability, skeptical about climate change, prioritizing economic and political issues over the environment

21%

Source: YouGov 2024

Colorado over indexes on Green When Keen - they agree climate change is a problem and we should do more, but it's not entrenched in their lifestyle yet. They are Pragmatic.

Top three states for Green When Keen



Heat Pump Segmentation

Although cost is the primary message, there will be different segments within Pragmatic Homeowners that will respond to different co-benefit statements. In Minnesota, Lifetime Value Seekers was the most attractive segment to target; in the Netherlands it was Eco-Conscious Innovators.

Source : Center for Energy & Environment, Minnesota 2004

Lifetime Value Seekers	Discerning Investors
“I am concerned about the **time and money** I have to spend on my heating and cooling system. I want a system that is **easy to install, maintain** and will **last a long time**.”	“I am concerned about the **quality** that my heating and cooling system offers. I am interested in the **comfort** that the system provides, the health benefits (for example better **air quality** inside my home) and the **environmental benefits**.”

Source: Center for Energy & Environment, Minnesota 2004

Eco-Conscious Innovators	Nearly-there converts
“I am concerned about the **energy consumption** of my heating and cooling system. I like to learn about **new and more efficient technologies** that allow me to **reduce my carbon footprint**.”	“I have **heard about air source heat pumps** before today, and I was **already interested**. I just need to find out if it’s the right choice for me and my home.”

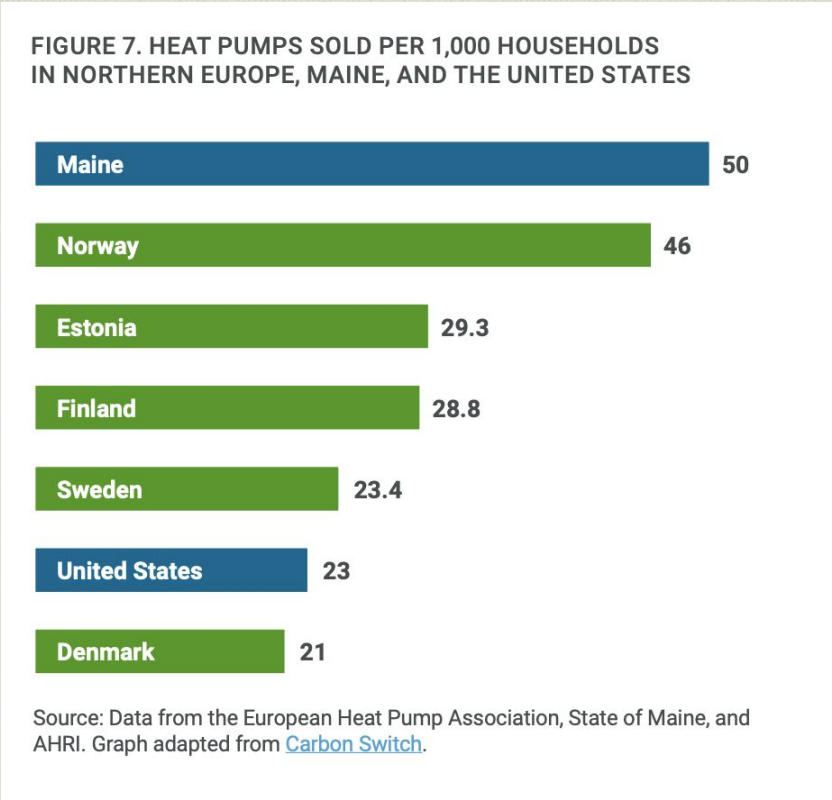
Source: Center for Energy & Environment, Minnesota 2004

Messaging

Building Owners & Managers

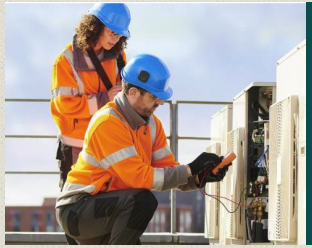
- Offer **positive examples** from the local market (Denver, Boulder).
- Rebate messages should be **clear** and **timely** to align with design phase.
- **Demonstrate reliability** of heat pumps in cold weather. Adapt ULI Mythbusting messaging.
- Need **training for O&M** personnel.
- Biggest retrofit opportunity: **buildings using electric or propane**.

Mythbusting



Source: Pumping Up Sustainability, ULI, 2024

Messaging



Contractors

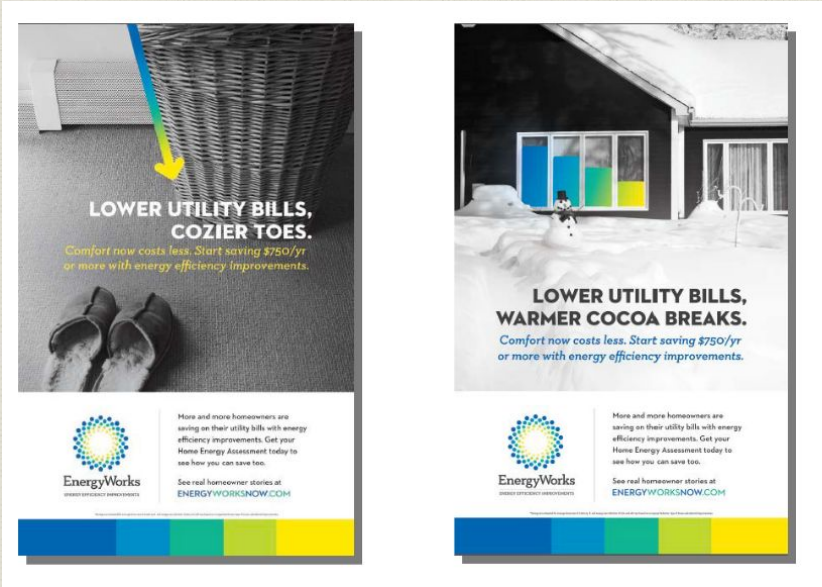
- Offer stories of customer demand and case studies of contractors finding new market opportunities in energy efficiency sector.
- Opportunity for good pay and economic opportunities.
- Increased production and emergent technology.
- Demonstrate reliability of heat pumps in cold weather.

Messaging

- Use authentic voices of current workers to prove it's a **well-paid**, **stable** opportunity.
- Make **opportunities for growth** clear.
- Showcase **diversity**, including of women.
- Show that it is **easy to get training** (assuming wraparound services in place).
- **Leverage peer networks** & trusted messengers (e.g., schools, WF centers, CBOs).

Timing

- Focus on key moments & decision points
  - Equipment failure / end of life
  - Moving
  - Home renovations
  - Retirement, parenthood
- Create urgency (limited time)
- Ensure relevance (contextual timing: seasons, bill cycle)
- Coordinate timing with installer capacity



Example: Energy Works (PA)

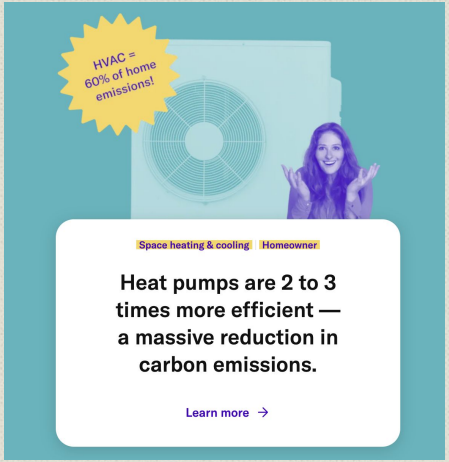
Approachable, Empowering Brand

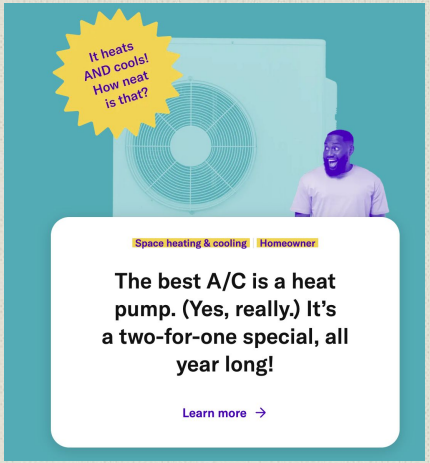
- **Tone:** Human, uplifting, relatable.
- **Words to avoid:** Retrofit, audit, decarbonize
- **Words to embrace:** Upgrade, home visit, easy, clean, smart
- **Storytelling, testimonials**: Others like you are doing this

Example: Southern CA Edison's "We Have the Power"

Visuals

Awareness of heat pumps is low. Visualizing heat pumps with photography helps. Research (CEE, 2024) shows that using product images increased interest.

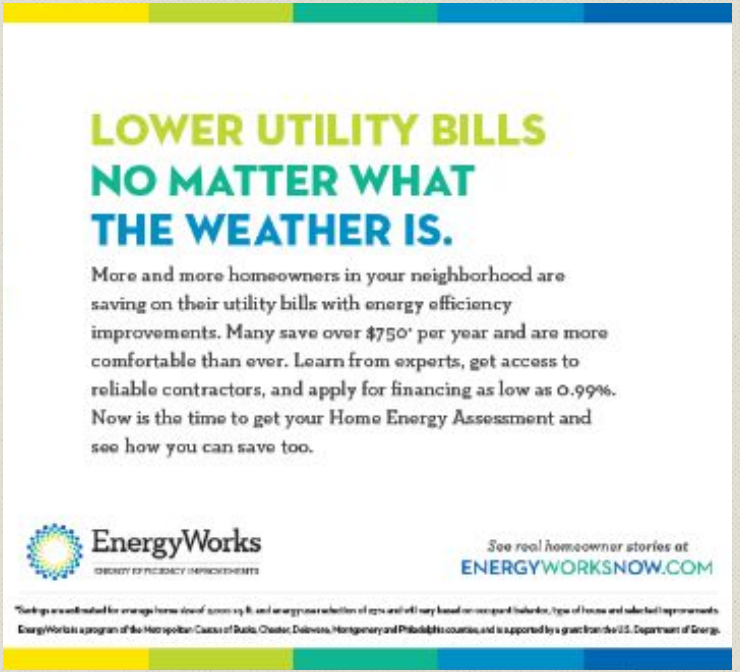




	Illustrated images		Lifestyle images		Product images	
	Midwest	Minn.	Midwest	Minn.	Midwest	Minn.
Decrease or significantly decrease interest	8.4%	9.8%	3.1%	3.4%	7.0%	8.6%
Neither	69.8%	66.8%	66.0%	64.6%	56.4%	54.0%
Increase or significantly increase interest	21.9%	23.3%	30.7%	32.0%	**36.5%**	**37.4%**

Social Proof

Descriptive norms – describing that all your neighbors are doing it – perform well.



Channels

- **Trusted local messengers:** Peer stories, CBOs, contractors
- **Channels:** Paid media, local ambassadors
- **Tools:** Visual norming cues (e.g., yard signs), neighborhood events, point-of-sale demos
- **Integrated approach:** Couple with hands-on community engagement & outreach

HeatSmart Tompkins held a meeting to launch its community campaign.

Example: The HeatSmart Tompkins (NY) campaign included a website, YouTube channel, media coverage, local advertisements, email list-servs, pamphlets, and yard signs. However, most enrollees learned about the campaign through friends and word of mouth.

Most Effective Campaigns

Campaign	Adoption	Audience Reach	Motivators	Campaign Elements
National Grid (Mass Save) – The Great Indoors (MA & NY) (multi-year targeted campaign focuses on moving customers through marketing funnel, esp. high-propensity segments)	8,200+ heat pumps installed; $57M customer rebates	27.4 million total campaign visits Web: 936,000 visits; 400,000 new visitors; 2,700 avg site visits/ day	**Comfort, Cost Savings/ Afford-ability, Efficiency**	Paid Media Direct Mail Email Travel & Leisure Magazine Social Media Google Search

Most Effective Campaigns

Campaign	Adoption	Audience Reach	Motivators	Campaign Elements
Baltimore Gas & Electric – Fairy Tale (Baltimore, MD) (tested themes: It Pays beat out Control (of energy use) & Get it Done (make easy to cross off to-do list)	312% increased partici-pation in Smart Energy Savers Programs	>25 million broadcast television impressions Web: 120% increase in traffic, 113% increase in new visitors	**Comfort, Cost Savings/ Afford-ability, Efficiency**	Paid Media - TV

Most Effective Campaigns

Campaign	Adoption	Audience Reach	Motivators	Campaign Elements
PSE&G – Welcome to the Saverhood (NJ) (idyllic community, smart choices)	219% conversion rate increase; 89% month- over-month conveRsions	676 million impressions Web: 265% increase in visits	**Comfort**, **Cost Savings/ Afford-ability, Efficiency**, Convenience	TV Social Paid Billboards Digital Paid Ads Events

Most Effective Campaigns

Campaign	Adoption	Audience Reach	Motivators	Campaign Elements
Wisconsin Utilities – Focus on Energy (WI)	109.9% of energy savings goal reached in 2016; 134.45% in 2017	32,594 new customers Web: 630% increase in visits; 511% increase in new visitors	**Comfort**, **Cost Savings/ Afford-ability, Efficiency**, Home improve-ment	Digital Welcome Packs

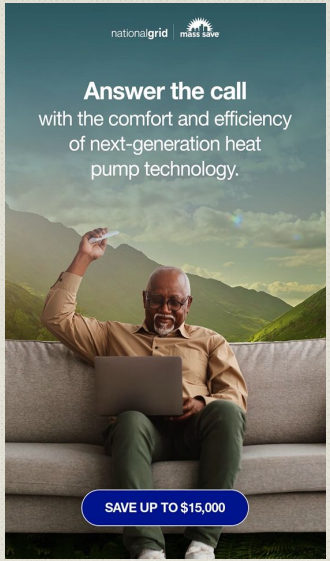
Most Effective Campaigns

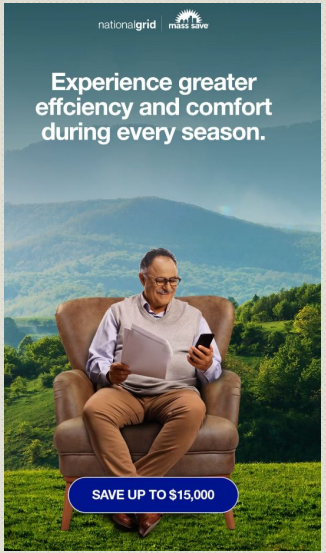
Campaign	Adoption	Audience Reach	Motivators	Campaign Elements
Consumers Energy – **Powered by Charles** (MI) (your "next-door" energy mentor – community orientation)	No data	66 million impressions, 34 million video views Web: More than 160,000 clicks	**Cost Savings/ Afford-ability**, Safety, Environ-mental	TV YouTube Channel

National Grid's "The Great Indoors"

NY & MA

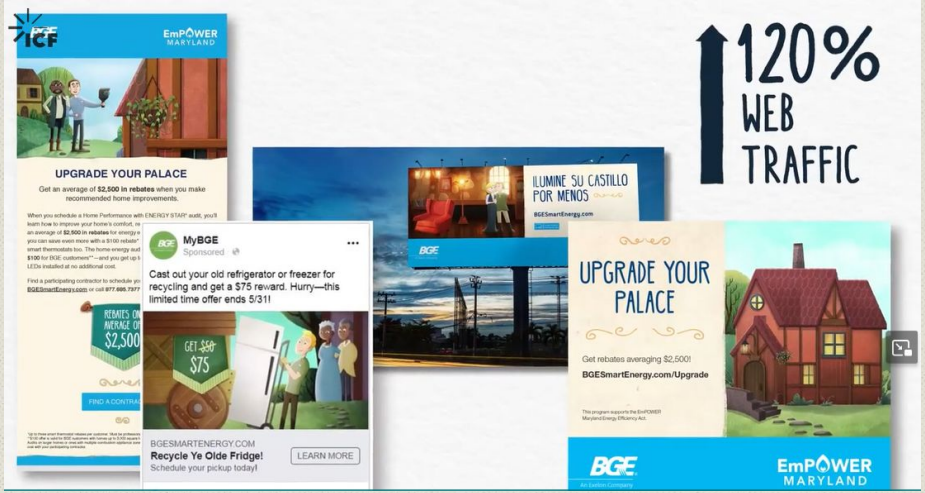
Multi-year targeted campaign focuses on moving customers through marketing funnel, especially high-propensity customer segments





BG&E's "Fairy Tale"

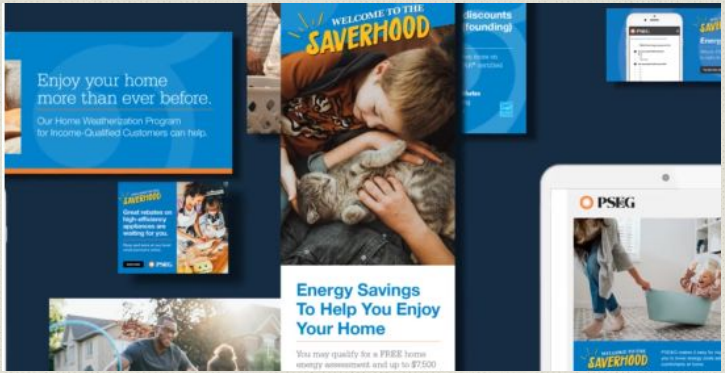
Baltimore Gas & Electric tested several themes & ultimately chose **Saving Money** (It Pays) over Control (of energy use) and Get it Done (make easy to cross off your to-do list).

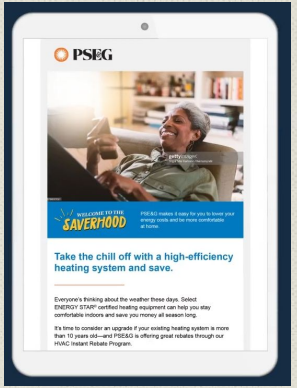


PSE&G's "Welcome to the Saverhood"

NJ

- Founded on concept "If savings were a place"
- Depicts **idyllic community** where all roads lead to **smarter** energy choices



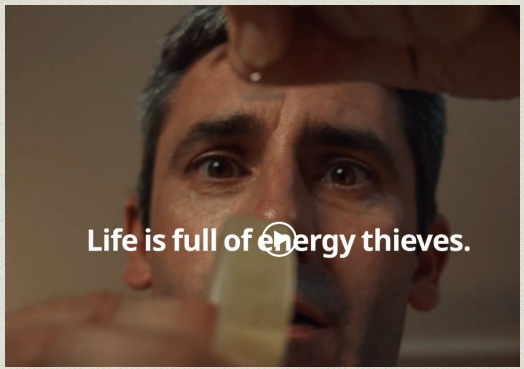


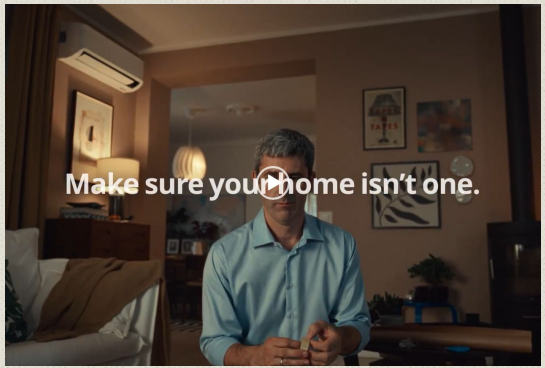
UK Government's "Feel All Warm & Fuzzy Inside"

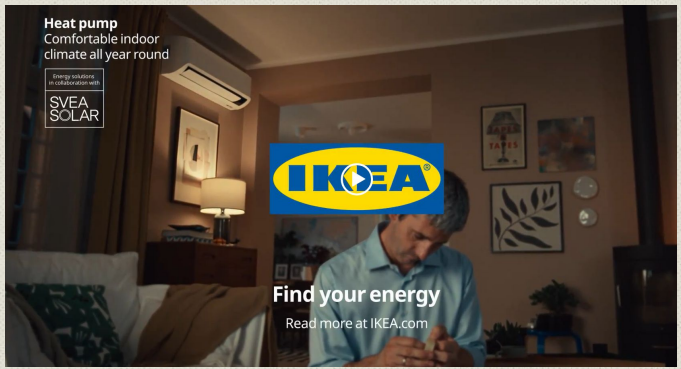
- **Authentic stories** based on interviews w/ real heat pump owners
- Launched Mar '25 so no data but praised for warmth, charm, & effectiveness in making heat pumps relatable

Ikea's "Life is Full of Energy Thieves"

- **Down-to-earth storytelling** to resonate globally
- **Playful** to communicate benefits & differentiate from traditional, technical energy advertising
- Launched 2024 but no public data







Common Elements

- **Cost savings/affordability** most universal benefits, followed by **efficiency**, and **comfort** benefits.
- Other motivators could be tested for relevancy with select audiences as secondary benefits: Environment, Health, Safety, Control, Convenience, Resiliency, Reliability, Innovation, Home improvement, Community.

Common Elements

- For campaigns specific to **heat pumps, comfort was most common motivator.**
- **Barriers were not explicitly addressed** in campaigns, with only one exception
- Many campaigns went **beyond marketing** to include community programs (e.g., info meetings, workshops, community events, yard signs, etc.)

Campaign Titles

- Many **action-oriented:** Create sense of immediate action & feel participatory
- "**Electric**" most commonly used: Sounds modern & appealing
- "**Energy**" commonly used: Neutral, gateway term appeals to wide audiences
- Some focus on **emotional/lifestyle benefits** (e.g., comfort, warmth, better, fairy tale): Humanize message & tie to everyday quality of life
- Some suggest **personal identity** or **local community**: Make people feel part of something bigger
- Some use **storytelling** or **playful** concepts (e.g., fairy tale, energy thieves, saverhood): Makes technical topic more approachable

Top Ranked Campaign Name Themes

Theme	Frequency/Presence
Action/imperative language	Very common (~50%)
"Electrify" / "Electric" terms	Common (~20%)
Energy/efficiency framing	Common (~20%)
Comfort / lifestyle benefits	Frequent (~15-20%)
Community / personal identity	Moderate (~10-15%)
Narrative / playful language	Moderate (~10%)

Top Ranked Benefits from the Campaigns

Theme	Presence / Frequency
Comfort & quality of life	Very strong (30-40%)
Savings / affordability	Very strong (30-40%)
Sustainability / clean energy	Common (20-30%)
Empowerment / action language	Moderate (15-20%)
Playful / story-driven tone	Growing (10-15%)

DRCOG-Region Program Titles

There may be **benefits or detriments** in supporting / aligning with existing program titles.

- Energize Denver
- Boulder County's Living Electric: Making power moves in Boulder County
- Efficiency Works (Estes, Longmont, Ft. Collins, Loveland)
- HEAR (Home Electrification and Appliance Rebate Program)

DRCOG-Region Program Titles

- CARE (Colorado's Affordable Residential Energy) Program
- RENU (Colorado Renewable Energy Upgrade Loan)
- C-PACE (financing)
- Colorado Clean Energy Fund (financing)

Bottom line: There is **no dominant, unifying** campaign or program.

03
NEXT STEPS

Gaps & Next Steps

- Need to **ground-truth** experiences of early adopters, especially homeowners & small businesses:
  - Upfront costs
  - Operating costs
  - Complexity, operating issues
  - Comfort and performance
- Use insights to inform discussion guides for **primary research**
- **Segmentation** for sub-audiences and secondary collateral development

THANK YOU!

03

APPENDIX A
Literature Review

Homeowners

Including Low-Income

Energize Denver Renewable Heating and Cooling Plan – Lotus, June 2021:

- Expressed preference for electric appliances, with exception of water heaters for homeowners, where 60% preferred gas-powered water heaters
- Main considerations for replacing home appliances are: 1. Safety., 2. Reliability and cost, 3. Energy efficiency, 4. Health.
- Notably, least important priority for qualities in replacement appliances was impact on indoor air quality YET these homeowners also said they would pay more for an appliance if it made their home healthier (61%).
- Primary concern was additional upfront costs. Other concerns: administrative burden of using assistance programs; lack of culturally appropriate outreach materials
- More encouraged to use air source heat pumps (ASHP) if provided both space heating and cooling

Denver Regional Data For Under-Resourced & POC Communities

The path to pollution-free buildings: Meeting Xcel's 2030 gas decarbonization goals, Western Resource Advocates, 2023:

- Lack of awareness is major barrier: Residents unfamiliar with how electric heating systems work or how compare to gas-based systems
- Education & outreach re: benefits & performance of heat pumps (especially in cold climate)
- Contractors are a primary outreach channel
- Consumer-facing tools critical: Online tools, hotlines, community events
- Streamlined programs: Simplify consumer journey by ensuring rebates, incentives, & upgrade processes easy to access & understand

Mindsets – Homeowners

- Mindset shaped by sustainable lifestyle, risk tolerance, age, political identity, knowledge of energy systems (Brown, et al., 2023)
- **Low-income** groups are most concerned with affordability, minimizing energy burden, and equitable access (Sandoval, N., et al., 2025)
- Heat pump adoption strongly correlated with electricity prices (Environmental and Energy Policy and the Economy, 2024)
- Heat pump water heater customers more likely than HP customers to explore new options while existing equipment still functioning well (Opinion Dynamics, 2022)
- Those who have solar more likely to adopt HPWH or HVAC HP (Opinion Dynamics, 2022)
- Feeling in control positively influences intention to adopt heat pump (Martens, E., et al., 2025)
- One can have positive attitude toward heat pumps but low intention to adopt (Martens, E., et al., 2025)

Barriers – Homeowners

- High costs (Sandoval et al., 2025)
- Incompatibility with existing infrastructure, requiring home upgrades (Sandoval et al., 2025)
- Concerns of disruption (Joana Neves & T. Oliveira, 2021)
- Lack of trusted contractors (Tan, L., et al., 2025)
- Long lifetimes of fossil fuel equipment (Rewiring America, 2024)
- Concerns that heat pumps slower to heat (Opinion Dynamics, 2022)
- Poor performance and skepticism that power grids will support transition & gov't incentives will continue (Ad Council Research Institute, 2025)
- Low awareness of incentives among **low-income** & younger consumers
- Limited policy support for **low-income** groups (Yim, E., & S. Subramanian, 2023)
- For **low-income**, Skepticism about upgrades that could increase costs or risk displacement (Sandoval, N., et al., 2025)
- For **low-income,** risk of higher energy bills if rate design isn't equitable (Yim, E., & S. Subramanian, 2023)

Motivators – Homeowners

- **Low-income** motivators
  - Equity & justice: fair treatment, protection from cost increases, access to benefits (Rewiring America, 2024)
  - Protection from rising fossil fuel costs (Yim, E., & S. Subramanian. 2023)
- Cost savings and environmental benefit (Rewiring America, 2024)
- Cost savings & long-term ROI (Brown et al., 2023)
- Energy efficiency & improved performance of electric appliances (Ad Council Research Institute, 2025)
- Health & comfort improvements (Yim, E., & S. Subramanian, 2023)
- Environmental benefits & climate action (Yim, E., & S. Subramanian, 2023)
- Financial support: Rebates, tax credits, etc (Kirszner, M., C., et al., 2022)
- Social proof / peer adoption (Koo, J., 2018)
- Desire to complement solar installations by converting as many appliances as possible (Opinion Dynamics, 2022)
- Local job creation (Clean Energy States Alliance, 2019)
- Reduced grid demand (Liang, J., et al., 2022)

Values - Homeowners

- Affordability & bill savings (Fink, H. S., 2011)
- Efficiency & reliability of home systems (Sussman, et al., 2024)
- Reliability & performance (Opinion Dynamics, 2024)
- Social acceptance / peer validation (Wolske, K. S., et al., 2020)
- Modernization among younger, tech-savvy homeowners (Koo, J., 2018)
- Ease of use & access (Sussman, et al., 2024; Tan, L., et. al., 2025)
- Political views: More politically conservative individuals less in favor of investment in energy-efficient technology than those more politically liberal – and less likely to purchase a product if it's label as environmentally conscious (D.M. Gromet, H. Kunreuther, & R.P. Larrick, 2013.)

Values - Homeowners

Low-income:

- More likely to rate cost, equipment longevity, performance, & availability of discounts as important when purchasing new water heater (Opinion Dynamics, 2024)
- Upgrades must provide immediate, tangible benefits & not risk displacement (Sandoval, N., et al., 2025)
- Most important benefits are reduced utility bills, lower energy burden, and equitable access (Yim, E., & S. Subramanian, 2023)
- High-efficiency electrification is prioritized while low-efficiency upgrades can increase costs (Yim, E., & S. Subramanian, 2023)
- Fairness, bill affordability, climate action, reducing energy burden, equitable access to benefits (Yim, E., & S. Subramanian, 2023)
- Affordability & bill savings most important (Fink, H. S., 2011)
- Environmental benefits are valued, but secondary to affordability (Sandoval, N. et al, 2025)

EE Upgrade Correlations - Homeowners

- Adoption higher for those with higher awareness of & support for policies. (Corbett, M., et al., 2023)
- Gateway tech ownership (like electric lawn equipment) increases openness to further electrification (Sussman, et al., 2024)
- Having solar PV correlated w/ adoption of HPWHs or HVAC heat pumps in CA (Opinion Dynamics, 2025)
- Factors that make more willing to adopt energy upgrades: 1. Children at home, 2. Owned home 6-10 years (owned home for more or less time progressively less willing), 3. Own home built after 1991, 4. Males significantly more willing than females, 5. Presence of household member comfortable installing upgrades (Reuven, S., et al., 2018)
- Factors that increase likelihood of adopting heat pump: 1. urban areas, 2. younger heads of household, 3. larger homes and 4. better insulation (Miguel Poblete-Cazenave, et al., 2023)
- HP adoption not found to correlate w/ income, unlike solar & EV adoption (Environmental and Energy Policy and the Economy, volume 5, 2024)

Awareness For home electrification

- General awareness of electrification high, but low knowledge of differences, especially VSHPs and their benefits. (Kirszner, et al., 2022)
- Many residents unfamiliar with how electric heating systems work or how they compare with gas-based systems. (Western Resource Advocates, 2023)
- Overall public awareness limited and uneven, especially of specific technologies like cold-climate heat pumps. (Romero-Lankao, et al., 2021)
- Only about a quarter of non-heat pump owners are open to installing one, indicating need for education. (Rewiring America, 2024)
- Openness to electrification shaped by early exposure / childhood experience w/ electric appliances. (Sussman, Reuven & Jonah Eisen, 2024)

Messaging - Homeowners

- Individuals may not understand link between energy efficiency & technology well enough to have consistent opinion independent of framing of a message. (Cole, J.C., et al., 2018)
- Rather than use terms like “retrofit,” use "upgrades." Using positive, less intimidating language can change perceptions of energy efficiency from technical problem to opportunity to invest in one's home and make it more comfortable. (Stern, S., 2011)
- To avoid decision paralysis, recommend three most effective actions homeowners can make. (Stern, S., 2011)
- Descriptive norm that compared resident to neighbors (e.g., 99% of people in your community reported turning off unnecessary lights to save energy) with a graphic resulted in greater energy conservation than other tested messages (self-interest, environment, or social responsibility). (Nolan, J. M., et al., 2008)

Messaging – Homeowners

- Messages on energy efficiency combining specific behaviour guidelines & economic benefits more effective than those based on either type of info alone. (Fernando Casado, et al., 2017)
- Specific messages more effective than generic. (Fernando Casado, et al., 2017)
- **Low-income:** Messages focused on affordability, energy burden reduction, equity most impactful. For example, highlighting that high-efficiency electrification can lower utility bills & protect against rising costs. (Sandoval, et al., 2025)

Messaging - Homeowners

- Most popular messaging & imagery for US respondents (Cole, J.C., et al. 2018): Message: “The newest energy efficiency technologies are now just within your reach & will save you money for years to come,” Imagery: $ and house, $ & lightbulb
- Respondents more likely to report willing to upgrade after reading messages that espoused specific benefits of upgrading (bill savings, health and comfort), and messages that took advantage of anchoring heuristic (i.e., reducing initial cost by amount homeowners would spend on repairs anyway). Homeowners chose to invest in more expensive upgrades if not listed next to extremely cheap “no-brainer” items with high annual savings. (Reuven, S., et al., 2018)
- Mentioning health, bill savings and comfort were most persuasive benefits to highlight. (Reuven, S., et al., 2018)

Messaging - Homeowners

- Long payback dates should be de-emphasized, if possible. When payback dates discussed, may be slightly more successful if present dates as specific months and years, as opposed to years-from-today. (Reuven, S., et al., 2018)
- Messaging should counteract belief that EEHAs hard to install or maintain: Use testimonials or narratives: "I thought this would be hard — but it was easy!" (Joana Neves & Tiago Oliveira, 2021)
- Coupling benefits, cost savings, and environmental benefits stronger messaging strategy. (Rewiring America, 2024)
- Messages combining personal benefit (cost/convenience), peer behavior ("your neighbors are doing it"), & environmental impact most effective. (Dietz, T., et al., 2009)
- Environmental messages work for some, but social proof & practical benefits generally more persuasive. (Wolske, K. et al., 2020).

Messaging - Homeowners

- Gain-framed messages more effective in encouraging take-up willingness among moderate-income homeowners than loss-framed messages
- For **low-income** homeowners, framing does not affect willingness. (Catherine Chen, 2023)
- Neither gain nor loss frame significantly increased willingness to purchase energy-efficient furnace. (Reuven Sussman, et al., 2018)
- Enviro messaging can turn away politically conservative. (D.M. Gromet, et al., 2013)
- In West, reducing harmful health & enviro impacts were key motivators for decarbonization. (Chrissi A. Antonopoulos, et al., 2024)
- Real-life product images that feature heat pumps favored over illustrations or lifestyle shots. (CEE & Behavioral Insights, 2024)
- Most impactful when messaging is transparent about benefits & tradeoffs, and focuses on bill savings & equity. (Yim, E., 2023)

Messaging Levers For Homeowners

- Leverage positive experience with "gateway" tech (e.g., electric lawn equipment). (Sussman, et al., 2024)
- Target equipment replacement moments. (Sussman, et al., 2024)
- Public commitments & visible leadership can be effective but vary by context. (Romero-Lankao, P., et al., 2021)
- Yard signs reinforce trusted messengers (your neighbor) and can create perception of social norm if enough yard signs in neighborhood. (Stern, 2011)
- Bringing neighbors together & having them commit in front of one another creates a social norm of taking action to improve efficiency. (Stern, 2011)
- Based on survey in western US (Chrissi A. Antonopoulos, et al., 2024):
  - Focus program messaging on reducing health and environmental impacts as it relates to technology choice.
  - Promote heat pump technologies to households without cooling.

Channels – Homeowners

- Word of mouth most common way people heard about heat pumps. (Opinion Dynamics, 2024)
- Peer influence via social networks & visible neighborhood adoption (e.g., signage, testimonials) boosts confidence & motivation. Stronger peer effects
  for heat pump adoption in urban (vs. rural) settings. (Yohan Min, 2025)
- Most effective channels leverage local peer networks: neighborhood programs,
  community groups, visible demonstration projects. Digital social networks
  & word-of-mouth also play strong role, especially when tied to local identity.
  (Wolske, K. S., et al., 2020)
- Most impactful when messaging is delivered by trusted local organizations (Yim, E., 2023)

Channels – Homeowners

- Most common ways respondents heard about availability of HPWH incentives was
  through utility bill inserts, web search, & word of mouth. (Opinion Dynamics, 2024)
- Trusted contractors (Tan, L., et al. (2025)
- Direct outreach (door-to-door, workshops, in-home assessments) helps personalize
  messaging and address individual concerns.
- Point-of-sale education (Sussman, Reuven & Jonah Eisen, 2024)
- Mass media (TV, radio, print), social media, community-based social marketing (door-to-door, peer-to-peer), feedback mechanisms (reports, online audits, in-home displays), competitions. (Harris, J., et al., 2010)

Channels - Homeowners

Low-income:

- Local utilities, CBOs, & trusted local leaders identified as effective (Sandoval, 2025)
- Community-based, time-limited campaigns (Solarize model) are effective (Koo, J., 2018)

Building Owners & Managers

Commercial, Multi-family, Industrial

Denver-Specific Data for Commercial Buildings

Energize Denver Renewable Heating and Cooling Plan – Technical Appendix, Lotus, June 2021:

- Lowest first cost drives most decisions for commercial groups
- Buildings turn over every five to seven years. The timeline for investments is short.
- Concerns about having to replace everything when going electric.
- Space constraints in some buildings; contractors cannot physically get some equipment in designated space.
- Improved health and comfort benefits do not resonate with commercial owners.
- Commercial customers starting to look at carbon impact and consider electrification options.

NOT COMMERCIAL-SPECIFIC: Generally, partnerships recommended by advisory groups (Public Health & Air Quality, Building Contractors, & Building Owners and Property Managers): HOA management companies, Residential neighborhood organizations, Realtors, Home inspectors, Large building owners (not small ones), Pipefitters, Plumber unions

Barriers For Building Owners & Managers

- Cost & payback period (Center for Energy and Environment, & Elevate Energy, 2021), including for upgrades like electrical wiring & service panels. (York, D., C. Cohn, D. Morales, and C. Tolentino, 2022)
- Lack of knowledge about heat pump operation & maintenance (Center for Energy and Environment, & Elevate Energy, 2021)
- Lack of understanding of implications for tenant comfort & retention (Center for Energy and Environment, & Elevate Energy, 2021)
- Concerns re: ability of heat pumps to keep tenants warm (Center for Energy and Environment, & Elevate Energy, 2021)
- Inexperienced heat pump designers & installers (Opinion Dynamics, 2022)

Barriers For Building Owners & Managers

- Concerns re: space / where to site heat pumps (Opinion Dynamics, 2022)
- Uncertainty & variability of monthly energy cost savings due to differences in climate, electricity rates, fuel costs, equipment efficiency (York, D., et al., 2022)
- Split Incentives between building owners & tenants: When tenants pay utilities, landlords under-invest in energy efficiency upgrades, resulting in higher energy costs & consumption for tenants. (Melvin, 2018)

Motivators for Multifamily Building Owners & Managers

Multi-Family

- Reluctance to be at forefront of technology because of past negative experiences. (CEE & Elevate Energy, 2021)
- Space heating and cooling with heat pumps viewed as easier to implement than water heating with heat pumps b/c equipment similar to what workforce used to working (Opinion Dynamics, 2022)
- Want to know equipment has worked effectively at other properties. (Opinion Dynamics, 2022)
- Willing to try equipment that operations and maintenance staff might not be familiar with. (Opinion Dynamics, 2022)
- **Buildings with centralized fossil heating system**: Reusing infrastructure not possible with current technologies – may overburden existing capacity/infrastructure; shift heating costs to residents; affect utility allowances subsidized to owners by HUD (York, D., et al., 2022)
- **Nonprofit-owned Affordable multifamily:** Little flexibility to consider HVAC systems that come with risks (CEE & Elevate Energy, 2021)

Motivators for Multifamily Building Owners & Managers

Subsidized affordable housing developers

- Where utility allowances employed, if cost of tenant utilities decreases, owners can capture difference in additional rent – particularly critical to nonprofit-owned affordable housing owners.

Values For Building Owners & Managers

- Installation of heat pumps needs to make financial sense. (Center for Energy & Environment, 2021)
- Performance & Reliability, particularly important for cold climate heat pumps
- Lowest First Costs drive most commercial decisions. (Lotus, 2021)
- Nonprofit-owned affordable multifamily:
  - Nonprofits operate with tight margins and need to avoid passing costs to tenants. But if utility costs drop, some nonprofits (especially in subsidized housing) can capture value through higher rent via adjusted utility allowances—making efficiency upgrades financially attractive (Center for Energy & Environment, 2021

Case Study

PROJECT PROFILE

ALL-ELECTRIC CAMPUS BY MORGAN CREEK VENTURES

BOULDER, COLORADO

KEY FACTS

- 12 mixed-use, commercial, and multifamily buildings
- 426,000 square feet
- $252 million invested
- Design begun in 2016, delivered in phases between 2017 and 2024
- Mid-rise, four stories
- VRF heat pump systems throughout

The founder of Morgan Creek Ventures, Andy Bush, has been implementing heat pumps in new construction for some time. In the last five years, watching the pricing and technology improvements, he says heat pumps have gotten more efficient every year. He estimates a 10 percent efficiency increase in that time frame; they both cost less to operate and better operate on colder days. "This is the path we are on with heat pumps—they are getting less expensive over time and performing increasingly better," says Bush.

"Natural gas is still cheaper at the moment, but if you put it in the context of future-proofing buildings, it makes more sense. Our total operational costs are going down while our competitors' are going up, long term."

The decision to implement VRF heat pumps into the all-electric campus in the Boulder Junction neighborhood was made because the technology was the most robust and efficient. The technology also works for all the building types that Morgan Creek Ventures is developing for the campus, ranging from mixed-use office with ground-floor retail to mixed-use multifamily/retail and multifamily-only buildings.

MORGAN CREEK VENTURES/FORTEM MEDIA

A multifamily building in the Morgan Creek Ventures development sits at 3200 Bluff Street.

Source: Pumping Up Sustainability, ULI, 2024

Messaging For building owners/managers

- Messages about rebates or incentives should be clear, transparent, & timed to align with planning for rehab work or early in design process of new buildings (Center for Energy & Environment, 2021)
- Reliability of heat pumps in cold weather must be demonstrated. (Center for Energy & Environment, 2021; York et al, 2022)
- Seven out of nine multifamily owners/managers interviewed mentioned that technical support, in form of more knowledgeable contractors or training for O&M staff, would be important for considering heat pumps. (Center for Energy & Environment, 2021)
    - Consider: Adapt ULI's myth-busting messaging using local climate & energy data (*Pumping Up Sustainability: Myth-Busting Heat Pumps in Commercial Real Estate*). Myths mostly related to cost & performance, but excellent resource at end for developers on what questions to ask during design phase.

Contractors

Denver-Specific Data For Workforce & Labor

Energize Denver Renewable Heating and Cooling Plan – Technical Appendix, Lotus, June 2021:

- Contractors are super busy.
- Difficult to motivate to do something new & unfamiliar.
- Women & people of color should be recruiting to help diverse young people see themselves in this workforce.
- Recruitment opportunities should start as early as high school.

Mindset For Contractors

- There are three types of contractors (Yao Zhang, 2023) :
  - Adopters: Initially positive but fragile, evaluative, watching external signals, looking for realized benefits.
  - Potential Adopters: Ambivalent, sensitive to peer behavior, resource constrained, evaluating expected benefits, peer behaviors, costs, & technical barriers.
  - Abandoners: Skeptical, risk-averse, disillusioned but potentially recoverable, looking at incentives, public pressure, competitor success, and clarity of standards.
- More confidence in selling, sizing, & installing HPWH equipment in smaller buildings & single-family homes than larger properties with centralized systems. (Opinion Dynamics, 2024)

Mindset For Contractors

- Often customer-centric, deferring to customer needs & cost sensitivities and wanting to guide with expertise, yet not confident in explaining and educating about heat pump technology and/or benefits (Kirszner, et al., 2022)
- More interested in providing uncomplicated service (i.e., with few callbacks) than selling/upselling items more difficult to install & explain to customer. (Center for Energy and Environment, 2021)

Values for Contractors

- Core Business Values: Economic rationality, cost sensitivity, resource capability & fitness, corporate responsibility, future competitiveness, reputation, image. (Opinion Dynamics 2024)
- Customer Satisfaction: Cost Effectiveness, Reliability, Comfort, Environmental Values (to a lesser extent) all play a part. (Kirszner, Hogan, & Pitt, 2022)
- Capacity & Capability: Ability & confidence in selling, installing, & maintaining heat pump technologies. (Opinion Dynamics, 2024)
- Lowest First Costs: Contractors know (& perhaps assume) that lowest first costs drive most commercial decisions. (Lotus, 2021)
- Core business values: Economic rationality, cost sensitivity, resource capability & fitness (companies with stronger capabilities & capacities more likely to value & adopt green behaviors). (Yao Zhang, 2023)
- Strategic & Cultural Values: Corporate responsibility, future competetiveness, reputation & image. (Yao Zhang, 2023)

Perceptions For Contractors

- Many unconvinced ASHPs work effectively in cold climates or believe the technology “isn’t there yet.” (Pickard, et al. 2020)
- Perception that standard (not cold-climate) ASHPs can’t meet winter needs, require more maintenance than other HVAC systems, will cost customers more money (due to low natural gas prices). (Pickard, et al., 2020)
- Many remain unaware of advantages & challenges of emerging HP technologies. (Northeast Energy Efficiency Partnerships, 2024)
- Among contractors familiar with ccASHPs, perceived benefits: long-term monetary savings, energy savings, ability to both cool & heat; ccASHPs can perform at colder temperatures than standard ASHPs, so money savings on heating bills because rely less on backup heating systems. (Pickard, et al., 2020).

Perceptions For Contractors

- Most contractors (59% of surveyed) aware of rebates or incentives and said they promote to customers. (Opinion Dynamics, 2024)
- Electrification & VSHPs often seen as “premium” or “best” option, which may not be warranted if cost is high. (Kirszner, et al., 2022)
- Many contractors generally knowledgeable but see gaps in peer training & proper sizing of HP technologies (Kirszner, et al., 2022)

Motivators For Contractors

- Offer of living wages & supporting career advancement opportunities can motivate underrepresented workers to participate in programs. (Shoemaker, et al., 2020)
- Good pay & new economic opportunities can motivate contractors & those seeking to enter the trades to enter into the energy efficiency sector. (Opinion Dynamics, 2024)
- Manufacturers increasing production of wider range of models & price points, making easier for contractors to promote & providing increased exposure/experience with HP technologies. (Kirszner, et al., 2022)
- Customer interest in long-term cost-savings &, for some, “going green” can motivate. (Kirszner, et al., 2022).

Motivators For Contractors

- Regulatory mandates/codes & incentives can motivate contractors & customers. (Kirszner, et al., 2022; Zhang, et al., 2023)
- Motivated by peer behavior if see other contractors or firms finding succes or market opportunities. (Kirszner, et al., 2022; Zhang, et al., 2023)
- Some contractors expressed they feel it's their responsibility to advise customers on energy efficient options. (Beek, et al., 2025)

Barriers for Contractors

- Supply chain & logistical challenges: Availability of appliances & parts for installation can be difficult (Bastian & Cohn, 2022; World Energy Outlook, 2022).
- Lack of awareness & confidence / risk-aversion: Contractors are risk averse and found to be least confident in ability to properly size HPWH equipment. Confidence in servicing & maintaining HPWH equipment similar across different property types, (Opinion Dynamics, 2024; Zhang, et al., 2023) Also find lack of consumer awareness challenging. (Bastian & Cohn, 2022)
- Lack of multifaceted skills training & capacity: A need to increase capacity & address business skills & soft skills, along with technical skills, to help minority-owned businesses & underrepresented workers navigate programs, licensing, certifications, & project financing. (Shoemaker, et al., 2020)

Barriers for Contractors

- Psychological resistance: May be uncomfortable with system complexity or technology customers don't fully understand & that may require callbacks & so are less likely to promote dual-heat, hybrid, other types of systems to customers. (Center for Energy and Environment, 2021; Kirszner, et al., 2022)
- Cross-licensing & time consuming admin: Often not cross-licensed across trades (e.g., electrical, plumbing, HVAC) & requirements disparate across jurisdictions. Electrification often requires multiple trades for full installation, making projects more complicated & schedules longer (Opinion Dynamics 2024). Complaints that time-consuming tasks & paperwork required. (SERT, n.d.)

Messaging For Contractors & Workforce Development

- Contractors play critical role as trusted messengers & “middle actors” in influencing customer decisions. Empower them as advocates with stories of success, use cases, & clear explanations. (Beek, et al. 2025)
- Make sure messaging is consistent & aligned across workforce development & consumer education. (Beek, et al. 2025)
- Create workforce development & training that is accessible, practical, & builds confidence. Address business & soft skills along with technical skills. (Beek, et al., 2025)
- Peer-influence important, especially from competitors & benchmark enterprises. Increasing contact between adopters & potential adopters or even non-adopters can effectively increase conversion to adopters. (Zhang, et al., 2023)

Messaging For Contractors & Workforce Development

- Tendency to overemphasize energy efficiency & cost savings from heat pump installation revealing need for increased efficacy, transparency, & consistency in messaging. (Mikhail, et al., 2025)
- Establish bellwether through early adopters, manufacturers, distributors, contractors already successful. (Bastian & Cohn, 2022)
- Partner with community organizations, utilities, manufacturers, sales/design technicians, & distributors as messengers for information & training. (Bastian & Cohn, 2022; Kirszner, et al., 2022; Pickard, et al., 2020)
- Peer influence from competitors & benchmark enterprises. Demonstration projects. Communicating growing market demand. Public pressure. Social norms around green construction practices. Professional networks, partnerships, industry groups. Messaging could also come from government through mandatory regulation, financial incentives, or evaluation criteria. Field visits and peer benchmarking recommended so contractors can see benefits, learn & reduce risk aversion. (Yao Zhang, 2023)

Prospective Workforce

Motivators For Future Workforce

- Economic opportunity: Pathways to financial security, good paying jobs, economic mobility, and career advancement. (Shoemaker, Ayala, & York, 2020; Opinion Dynamics, 2024)
- Social impact (Student Energy, Orsted, 2023)
- Salary (Student Energy, Orsted, 2023)
- Alignment of values with those of the company (Student Energy, Orsted, 2023)
- Opportunities for growth (Student Energy, Orsted, 2023)
- Job stability (Student Energy, Orsted, 2023)
- Good pay & new economic opportunities can motivate contractors & those seeking to enter the trades to enter into the energy efficiency sector. (Opinion Dynamics, 2024)

Barriers For Future Workforce

- Low awareness of “energy efficiency” as career path (ACEEE, 2025)
- Negative perceptions of careers in construction as being physically demanding, outdoorsy, & masculine (Alexander, K., et. al, 2024)
- Perceptions of construction as a ‘male’ occupation (Alexander, K., et. al, 2024)
- Shortage of aligned training programs (ACEEE, 2025)
- Inadequate professional development support (ACEEE, 2025)
- Lack of support services to support learning – including wraparound services, such as for transportation, childcare, and housing (Berkowitz 2019; Madigan & Bonney, 2021)
- Limited job preparedness, including support for writing a resume, access to work clothing, and preparing for interviews (Lehmann, et al., 2021)
- Lack of access to career planning and post-training advancement support (e.g., job descriptions, catalog of available jobs for jobs seekers) (Fazeli, 2021)

03

APPENDIX B
Campaign Examples

Appendix B Summary

NATIONAL

Organization	Campaign Name	Tagline
DOE	Better Buildings Initiative	Saving Energy. Saving Money. Leading the Way
IRA	Home Energy Rebate Program	Electrify everything- affordably
EPA	Energy Star Home Upgrade	Build a better home for you - and the planet
BDC	The Switch is On	The clean energy future starts at home. Ditch Gas. Go Electric
Rewiring America	Electrify Everything	Save money. Save the planet. Go electric

Appendix B Summary

NATIONAL

Organization	Campaign Name	Tagline
RMI	Electrify Efficiently	Electrify with ease. Smarter retrofits. Cleaner homes.
MEAM	Electrify Your Life	Comfort. Convenience. Clean energy.
Tech Clean California	The Switch is on	The clean energy future starts at home; Break up with gas
NYC Mayor's Office	ElectrifyNYC	Helping NYC Keep Cool, Safe and Sustainable

REGIONAL

Organization	Campaign Name	Tagline
Energy Trust of Oregon	Energy Savers, Ready for Tomorrow	Energy Trust helps you save energy and money
Efficiency Maine	Save like a Mainer	Save like a Mainer
Mass Save	Start saving with Mass Save	Savings through Energy Efficiency
EnergyWorks		When your house is more comfortable, you're home.
Boulder	Living Electric	Making power moves in Boulder County

REGIONAL

Organization	Campaign Name	Tagline
CleanPowerSF	Break up with Gas	Move on with electric
ElectrifyDC	ElectrifyDC	Working together to electrify all homes
City of Bellevue	Energy Smart Eastside	Together we're electrifying the Eastside
Baltimore Gas & Electric	Fairy Tale	Live efficiently ever after

UTILITIES

Organization	Campaign Name	Tagline
Wisconsin Utilities	Focus on Energy	Wisconsin is in for Home Solutions
Con Edison	Energy for Every Day (2024) Where Clean Energy Lives (2021-23) Clean Energy for All (2019-20) Energy Future (2018-19)	New York runs on energy. We're making it clean. A cleaner, greener energy future Energy touches every moment of our lives. Switching to renewable energy means these moments can last forever. With Con Edison, you have the power

UTILITIES

Organization	Campaign Name	Tagline
PSE&G	Welcome to the Saverhood	
Xcel Energy	Get Pumped for Heat Pumps	
Denver Water	Use Even Less	Use only what you need
Ikea	Life is Full of Energy Thieves...	...Make sure your home isn't one.
LG	Switch for Good	Make the switch for good

Organization	Campaign Name	Tagline
UK Government / Department for Energy Security and Net Zero	Feel All Warm & Fuzzy Inside	

City Level Campaigns for Biz

Baltimore Gas & Electric's "Small Business, Many Hats" campaign:
https://vimeo.com/903758585

- Motivators focused on cost savings, convenience, and enviro benefits
- Highlighted small business owners who had "truly" benefitted from BGE's energy & cost saving program
- Messages included:
  - "Small businesses are the heart of every community. And Baltimore's are doing better than ever, thanks in part to BGE."
  - "When do you find time to cut costs? Never stop looking for ways to save."
  - A chance to get "a helping hand, a little break, a little sanity"

City Level Campaigns

Baltimore Gas & Electric

Talking Tips
2009 – 2015

ICF set up focus groups to test customer sentiment and messaging. The results were used to develop BGE's Talking Tips campaign.

+ Lighthearted Tone

+ Gave energy efficiency advice and program specific offers

The Ways
2015 – 2019

Based on focus group findings, customers thoughts on BGE, and social norming The Ways campaign was developed.

+ Social Norms Approach resonates; customers are proud to use BGE

+ Used an upbeat illustrated style to simplify complex subjects

CO FOCUS

City Level Campaigns (Denver)

Denver Water

Videos here:
https://www.denverwater.org/about-us/history/use-only-what-you-need/use-only-what-you-need-video-gallery

CO FOCUS

City Level Campaign

Denver Water: Life Is Better with Water

Video here:
https://www.facebook.com/DenverWater/videos/840470533222837

City Level: Campaign Evolution

Con Edision (NYC)

Campaigns focused on energy since at least 2018:

- Energy Future (2018-19) - focus on innovation
- Clean Energy for All (2019-2020) - focus on community, family & tech
- Where Clean Energy Lives (2021-2023) - focus on innovation & relationships
- Energy For Every Day (2024) - focus on diversity & worthiness; portrays NYC not only as bustling metropolis, but as collective home deserving of preservation.

City Level

Ann Arbor's A2Zero

Not marketing campaign per-say – mostly community events, website, & newsletters

CO FOCUS

City/County Level Campaigns

City of Boulder w/ Boulder County

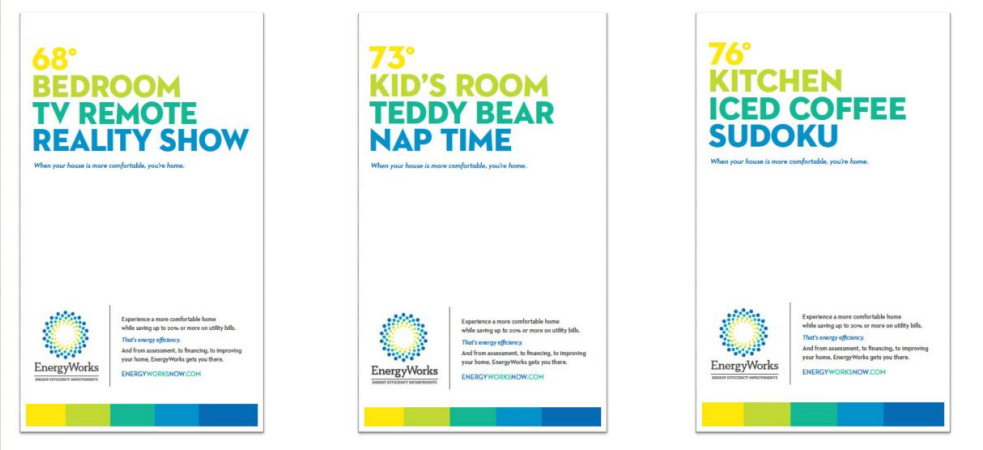
- Focused on promoting comfort over savings
- Not robust marketing campaign: Info meetings, targeted mailings, social marketing; Google ads; TV ads
- Identified homeowner cohorts likely to consider upgrading:
  - Early Energy Tech Adopters
  - Small Ranch Houses (lacking central AC)
  - Well-To-Do Progressives
  - “Greens” in need of replacing AC/furnace in next 5 years
  - AirBnB Rentals Lacking AC

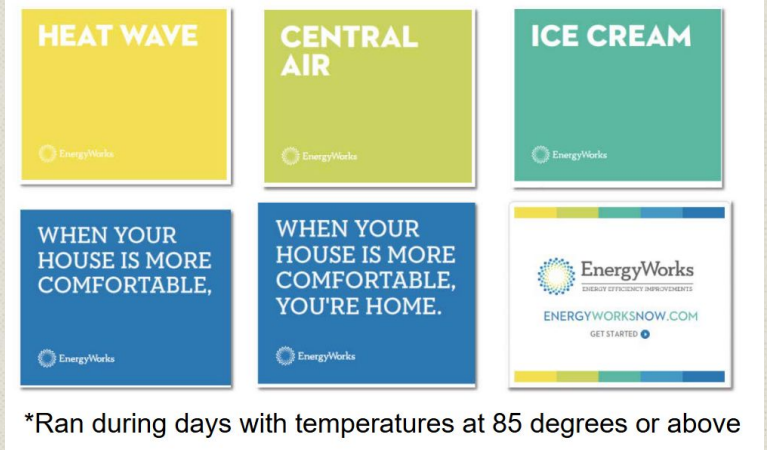
County Level Campaigns

Boulder County's Living Electric

County Level: 3-Phase Campaign

EnergyWorks Phase 1: Awareness (Several PA counties)

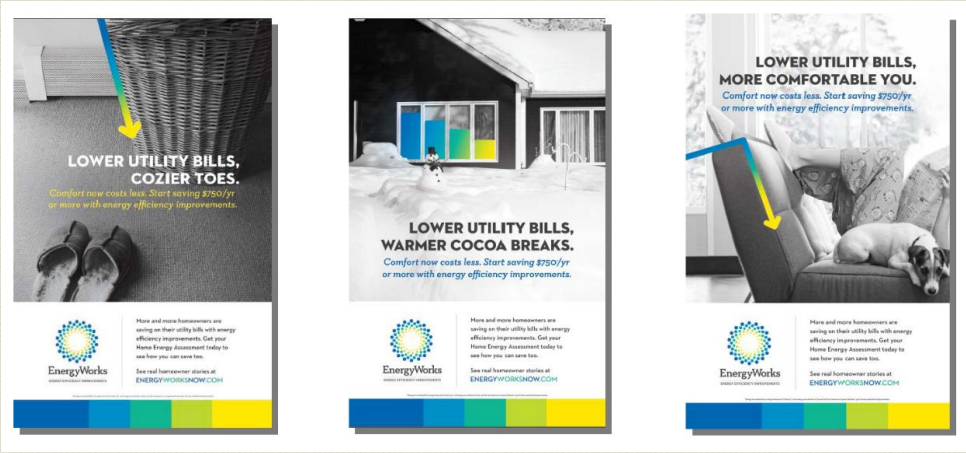


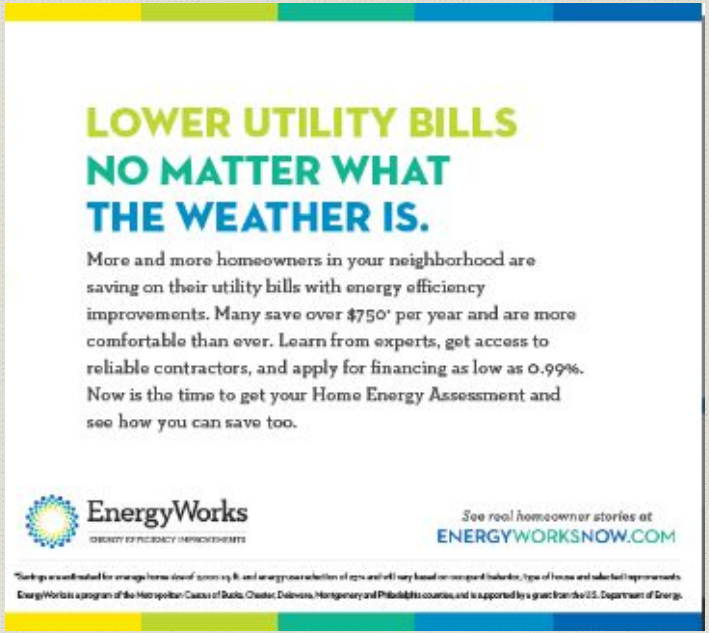


*Ran during days with temperatures at 85 degrees or above

County Level: 3-Phase Campaign

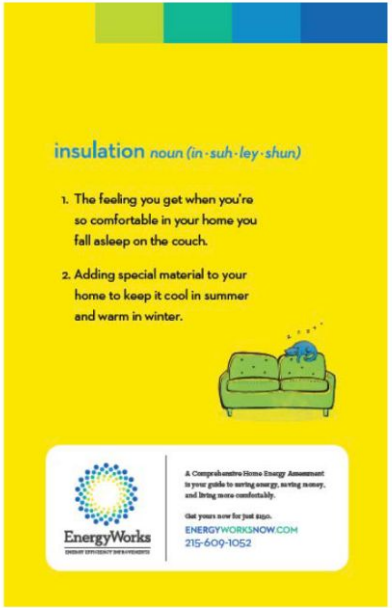
EnergyWorks Phase 2: Harder Sell / Marry Value with Comfort
(Several PA counties)





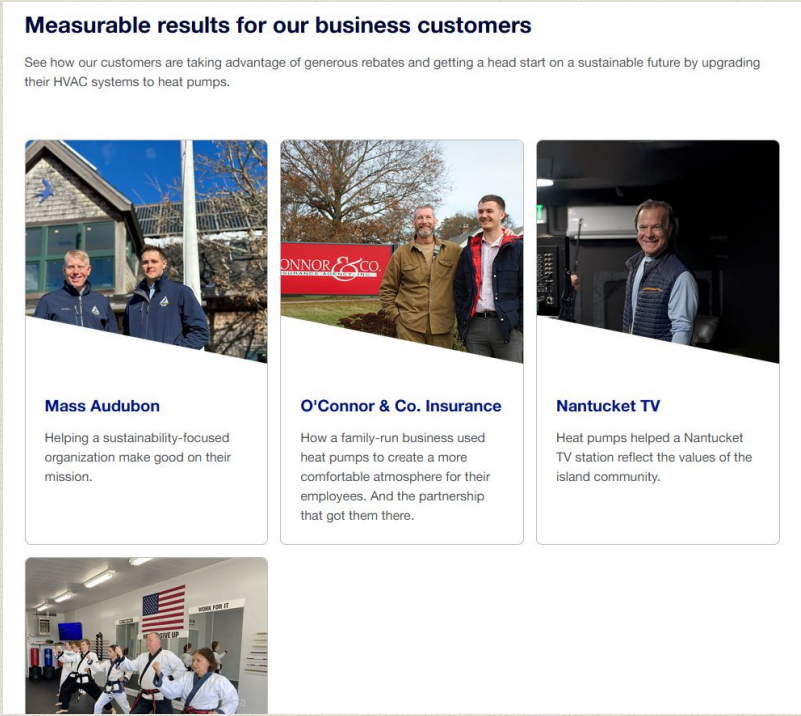
County Level: 3-Phase Campaign

EnergyWorks Phase 3: Education, Comfort & Savings (Several PA counties)



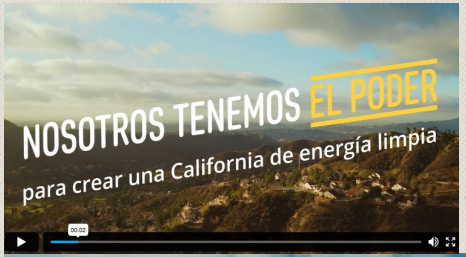
State Level

National Grid (NY & MA)
Marketing to Businesses



State Level (continued)

Southern California Edison's "We Have the Power"
Video here:
https://www.rpa.com/work/project/southern-california-edison-we-have-the-power-campaign
Utility customers often feel powerless and isolated: Campaign makes them feel powerful and united and inspires collective action by showing that everyday actions make difference for shared community – by making heroes of ordinary Southern Californians of all walks of life.



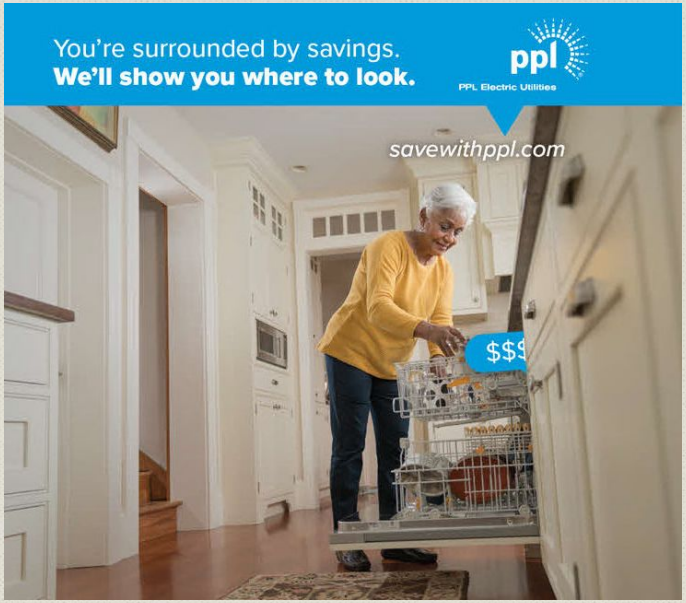
State Level Campaigns

Wisconsin Utilities' Focus on Energy

Video here: https://www.youtube.com/watch?v=FYWBsFafRyw

State Level Campaigns

PPL Electric Utilities' Opportunities Everywhere

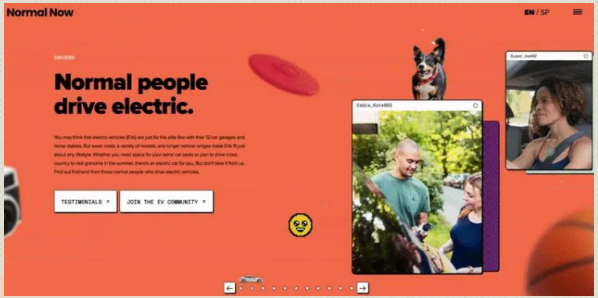


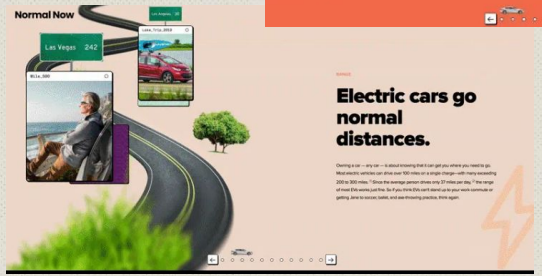
State Level Campaigns (continued)

Consumers Energy's Powered by Charles

National Level Campaigns

Electrify America's "Normal Now"
Videos:
https://workingnotworking.com/projects/301537-normal-now-electrify-america





Compares "new tech" of past with transportation method of future. Explores how scary old "new tech" was & reinforces that while it may seem weird at first, it's normal now.

National Level Campaigns (Continued)

U.S. Department of Energy (2011)

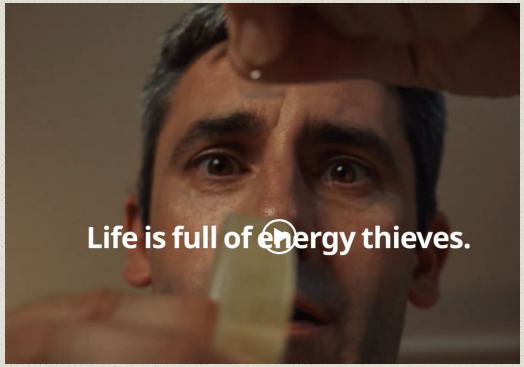
International Campaign

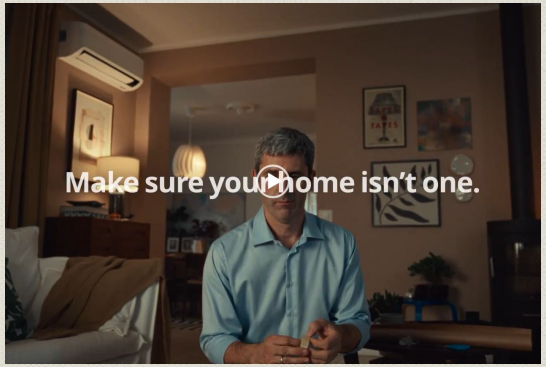
UK Government's Feel All Warm & Fuzzy Inside

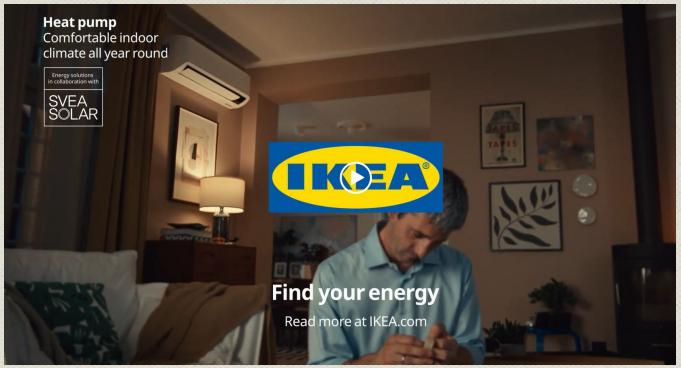
Video here: https://www.youtube.com/watch?v=1pxFjrGMVew

Product Campaign

Ikea’s Life is Full of Energy Thieves
Video here:
https://lbbonline.com/news/ikea-highlights-everyday-energy-thieves-in-latest-campaign

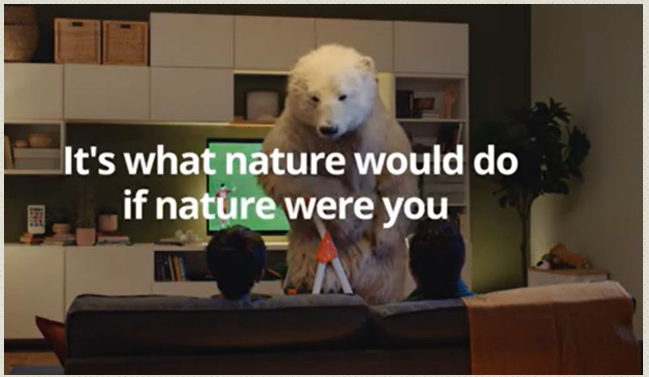






Product Campaigns

Ikea's It's What Nature Would Do
Video here:
https://campaignme.com/ikeas-new-campaign-on-sustainability-shows-the-changing-relationship-of-people-with-nature/



CO FOCUS

BDC

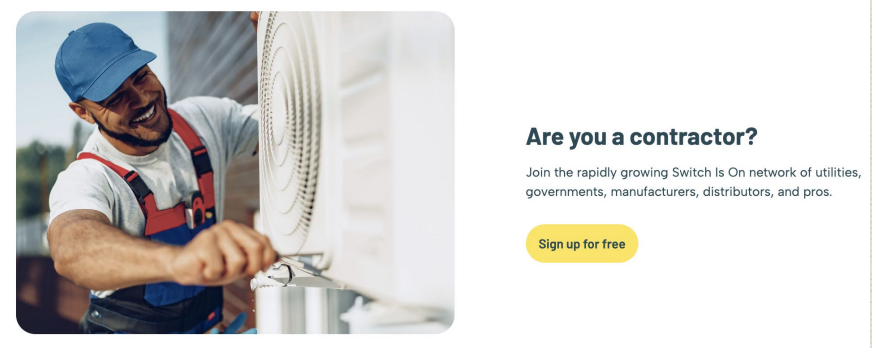
Building Decarbonization Coalition (BDC) is a national coalition that works across 9 states including Colorado to drive the clean buildings transformation by building partnerships with utilities, labor and workforce, environmental, climate justice, and public health stakeholders.

CO FOCUS

BDC – The Switch is On

THE SWITCH IS ON

The Switch Is On initiative was launched in 2019 by the Building Decarbonization Coalition (BDC) to educate, inspire, and make switching to electric appliances easier for communities, contractors, and all those who live and work in buildings.



INDUCTION COOKING
THE SWITCH IS ON
FAN CLUB

What others are saying...

THE SWITCH IS ON

YouTube channel is filled with videos addressing all kinds of questions + concerns about switching to electric. Views are quite low, however.

STATE

MEAM - Electrify your Life

MEAM
MUNICIPAL ELECTRIC ASSOCIATION OF MASSACHUSETTS

Municipal Electric Association of Massachusetts provides social media content for Utility companies to share. Focus on power, and energy puns that empower you to be the hero, be smart, be seasonal and save money

Water Heaters

A new ENERGY STAR® certified heat pump water heater can save a home up to $3,500 in energy costs over its lifetime. Learn more about SELCO's heat pump water heater rebate at www.goo.gl/G1nBvF

Energy Star Appliances

Rebates on select Energy Star® appliances are available from SELCO at www.goo.gl/G1nBvF. Learn more about energy savings at www.energystar.gov #ThePowerIsYours

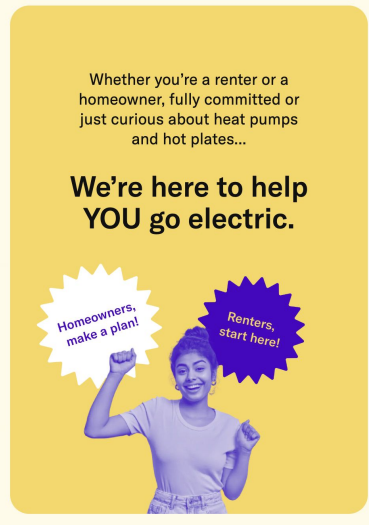
Rebates on select Energy Star applia

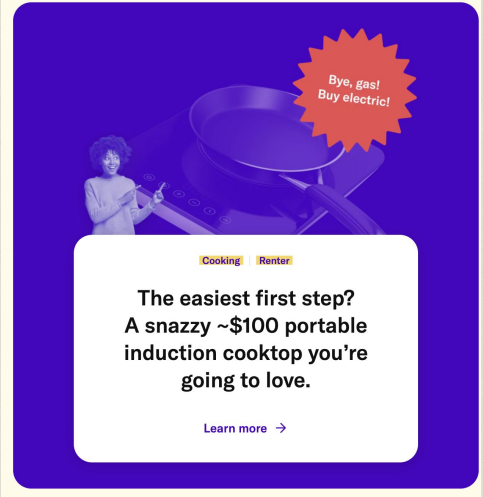
Rebates on select Energy Star® appliances are available from SELCO at www.goo.gl/Vd4rcw. Learn more about energy savings at www.energystar.gov #PlugInForEnergySavings

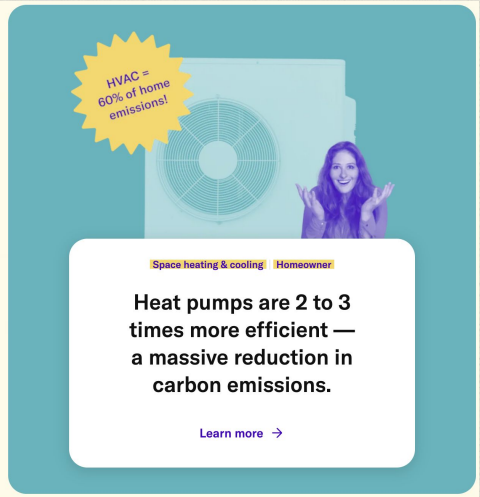
NATIONAL

Rewiring America

National non-profit organization that provides consumer-facing content to electrify in additional to research resources on adoption best practice across key groups.

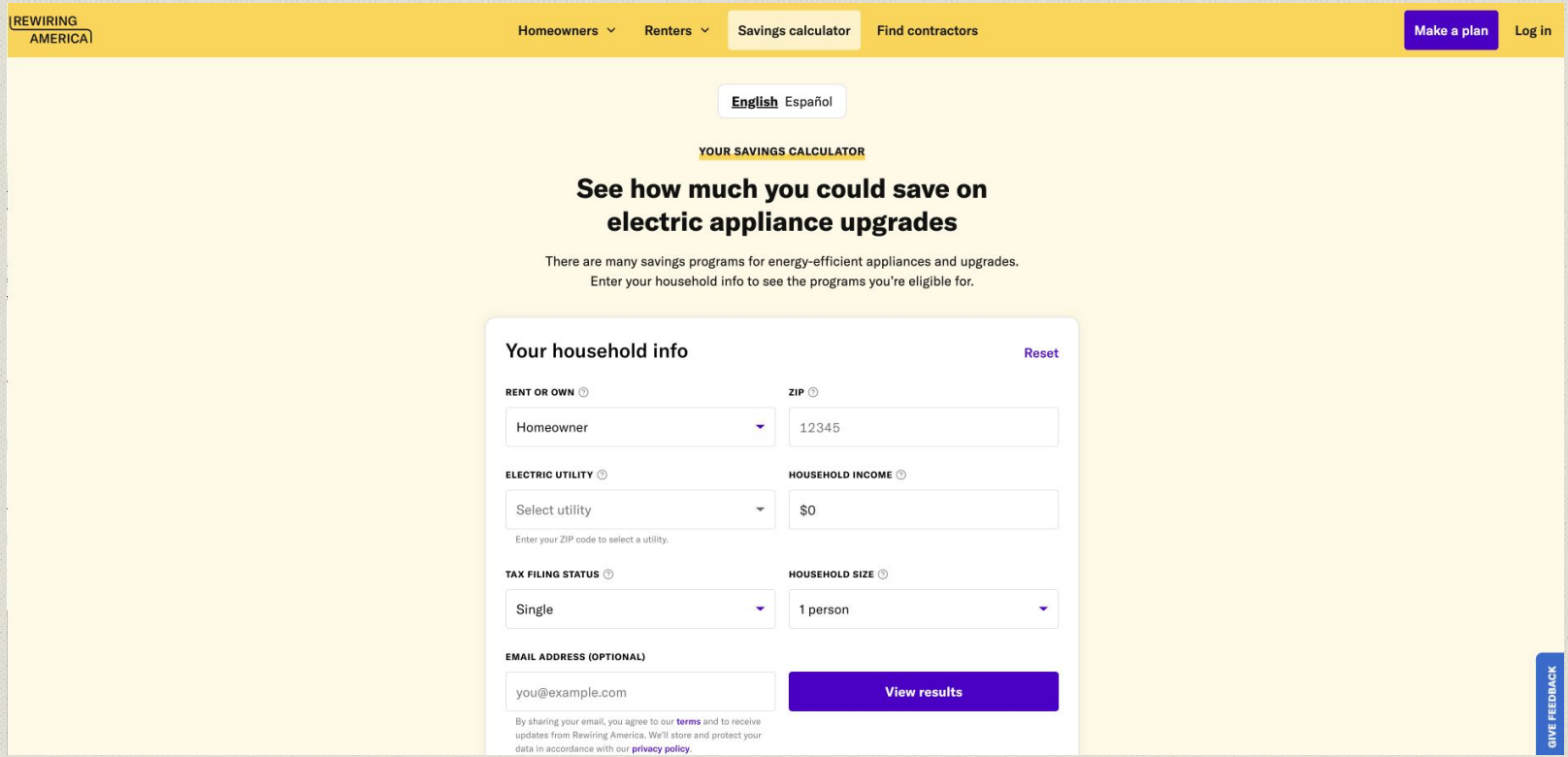






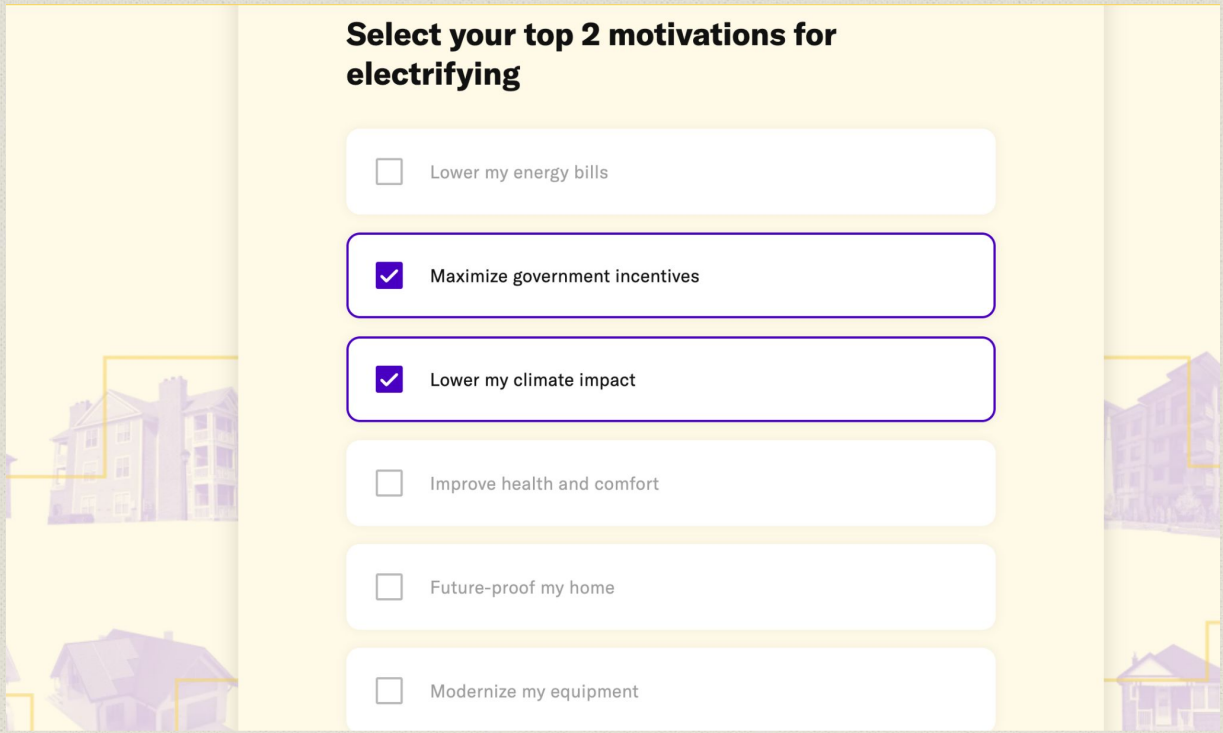
NATIONAL

Rewiring America (2 of 3)



NATIONAL

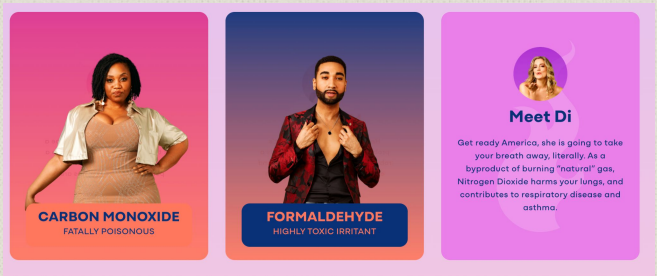
Rewiring America (3 of 3)



NATIONAL

Gas Leaks

National non-profit organization that seeks to expose the truth about the danger of natural gas and the Fossil Fuel Industry's disinformation machine. Uses humor of 'Break Up with Gas' and 'Hot & Toxic' spoof reality star show.



THE TOXINS

"Natural" gas is a hot mess. After all, with 21 pollutants filling the air in your home, there's no escaping the drama. It's almost like living with a house full of toxic reality stars. Get to know some of the most dangerous "cast members" of Hot & Toxic!

CITY

City Level Campaigns

Boulder County

Boulder County campaign on electrification uses humor of animated bear to show benefits of going electric. No campaign results available. Content released on Instagram, YouTube in the last month (Boulder County)

San Francisco

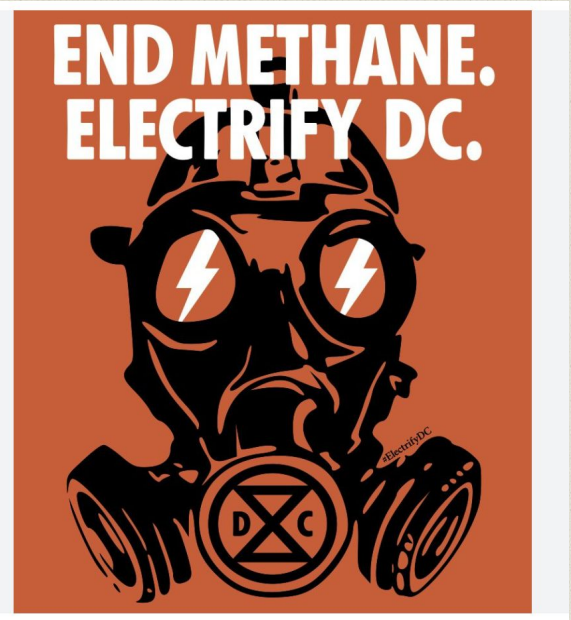
Break up with Gas campaign from CleanPowerSF, site attracted 10,000 visitors, 700 followed links to find out about incentives (CleanPowerSF)

CITY

City Level Campaigns (2 of 2)

ElectrifyDC

Electrify DC!
FOR CLIMATE, HEALTH & $AVINGS



Non-proft working to decarbonize Washington DC.

NATIONAL + STATE

Healthy Homes

Healthy Homes Partnership

National HUD campaign to support low income families with healthier homes covering health, safety and environment, supported by local campaigns. Federal funding just got pulled.

HEALTHY HOMES

HCDNNJ HEALTHY HOMES and Communities

HEALTHY HOMES FAIR

Green & Healthy Homes Initiative®

Healthy Homes

H O H N Ohio Healthy Homes Network

NATIONAL + STATE

Green & Resilient Retrofit

National HUD campaign to support building retrofit with funding for energy efficiency and building materials.

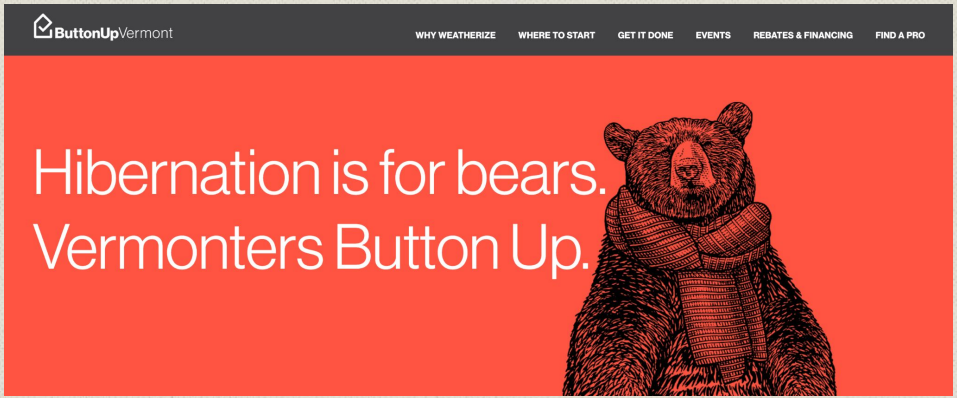
STATE

Efficiency

Efficiency Vermont

mass save
Savings through energy efficiency

efficiency MAINE



EnergyTrust of Oregon