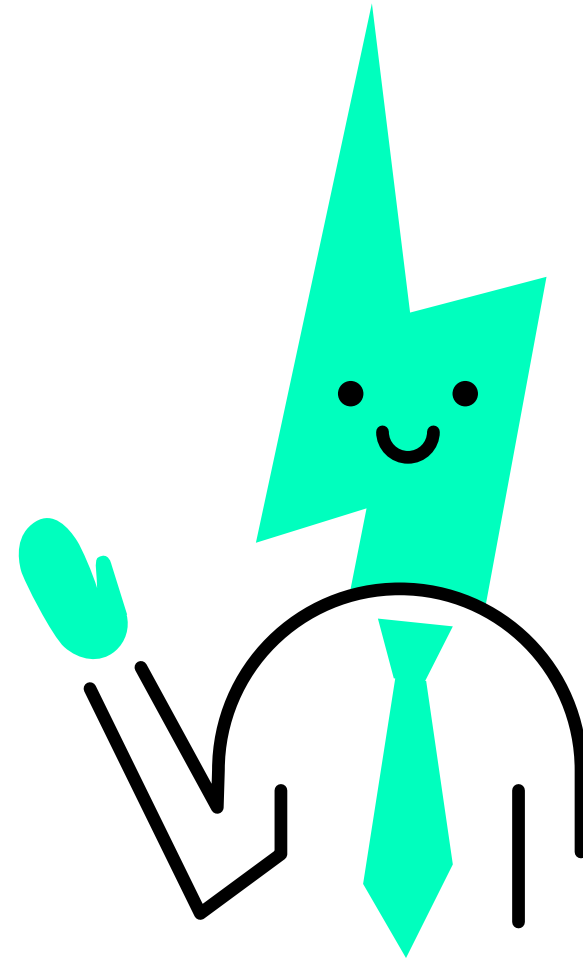




Electrification, Inc.

Recruiting for a low-carbon future

Sustainability is our business



Sheltongrp.com

Introduction & Methodology

Every year we conduct an **Energy Pulse®** survey to explore consumer perceptions and behaviors around energy and the environment. This year we set out to understand what it will take to get people to switch from gas to electric and uncover messaging that could make it happen.

- Our seventeenth **Energy Pulse** study is Shelton Group's annual exploration of consumer perceptions and behaviors regarding energy and the environment. The study contains a mix of new topics and tracking questions.
- The **online survey** was fielded in December of 2023, surveying a total of 2,000 U.S. respondents
 - Analysis and reporting also includes a breakout of natural gas users (780)
- **Stratified sampling** mirrors the U.S. population, using quotas for geography, age, gender, education and race; data were weighted slightly to match U.S. population distributions. Margin of error is +/- 2.2%.

To address climate change,
we need to move toward a
lower carbon future.
Electrification is part of that.

*But how do we get people
on board?*



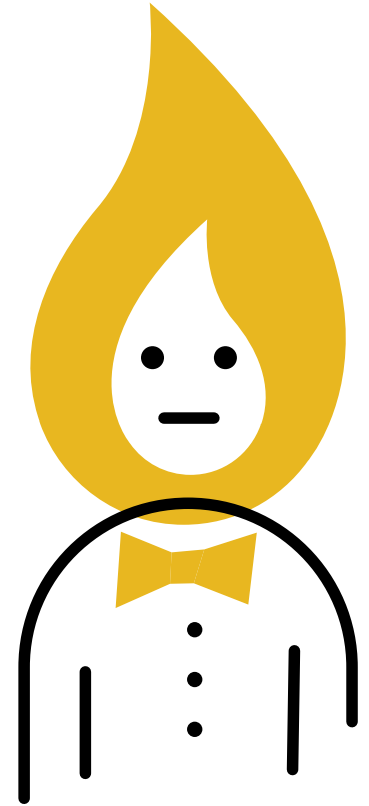
Here's what we know:

- Our 18 years of consumer insights work focused on energy and sustainability topics show us that messaging around saving the planet alone is not enough to persuade most people to switch to electric or install energy efficient measures in their homes.
- Comfort, convenience and health, however, are top motivators.

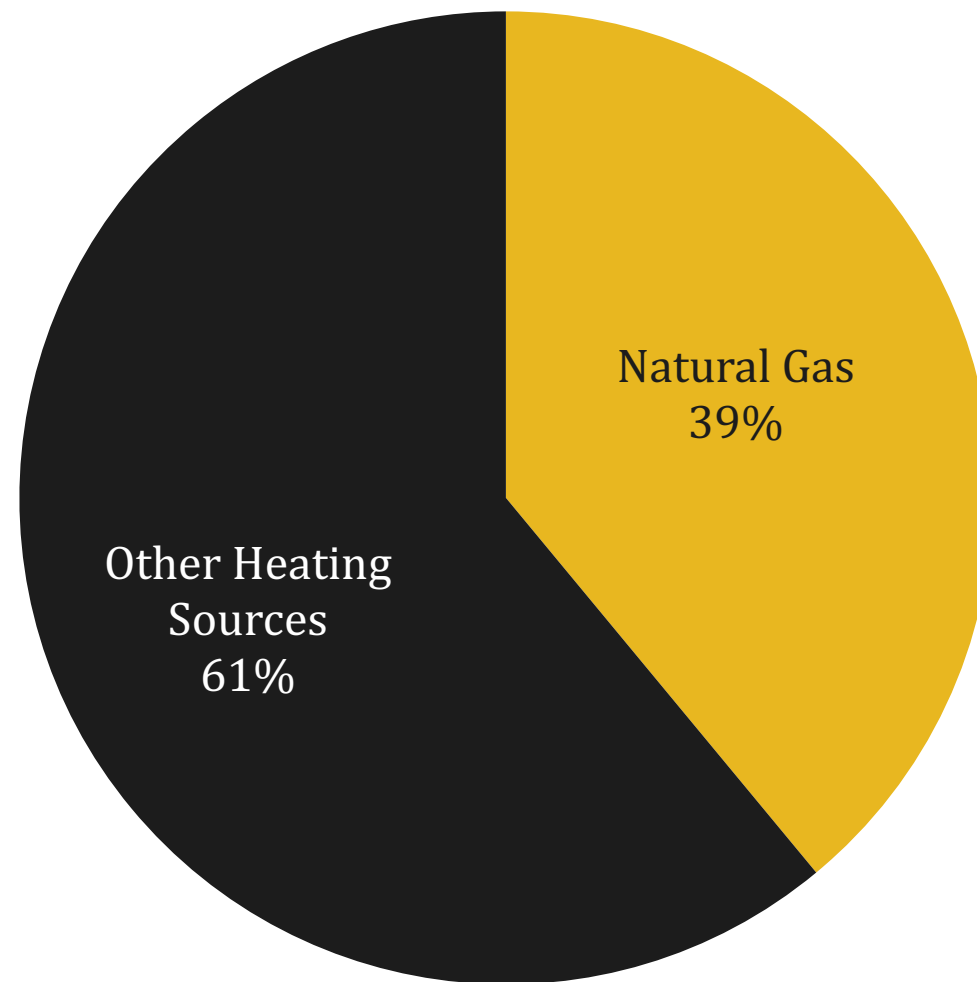
Because of this, we have to customize how we talk about electrification. That messaging needs to offer the personal benefits that come along with each electric option versus the concept of 'electrifying your life.'

The role of attachment

Our hypothesis was that a lot of natural gas users would be deeply attached to the comfort and familiarity of their energy source; and, it turns out, they are...



Let's look at all our respondents.
39% of them are natural gas users and 61% use other energy sources.



What is your home's primary heating source? n=2,000

We tested **all respondents** on a battery of feelings toward their energy source.

The natural gas users were much more generous in how they described their energy source compared to the other 61% of respondents.

As suspected, natural gas users *really* love their natural gas.

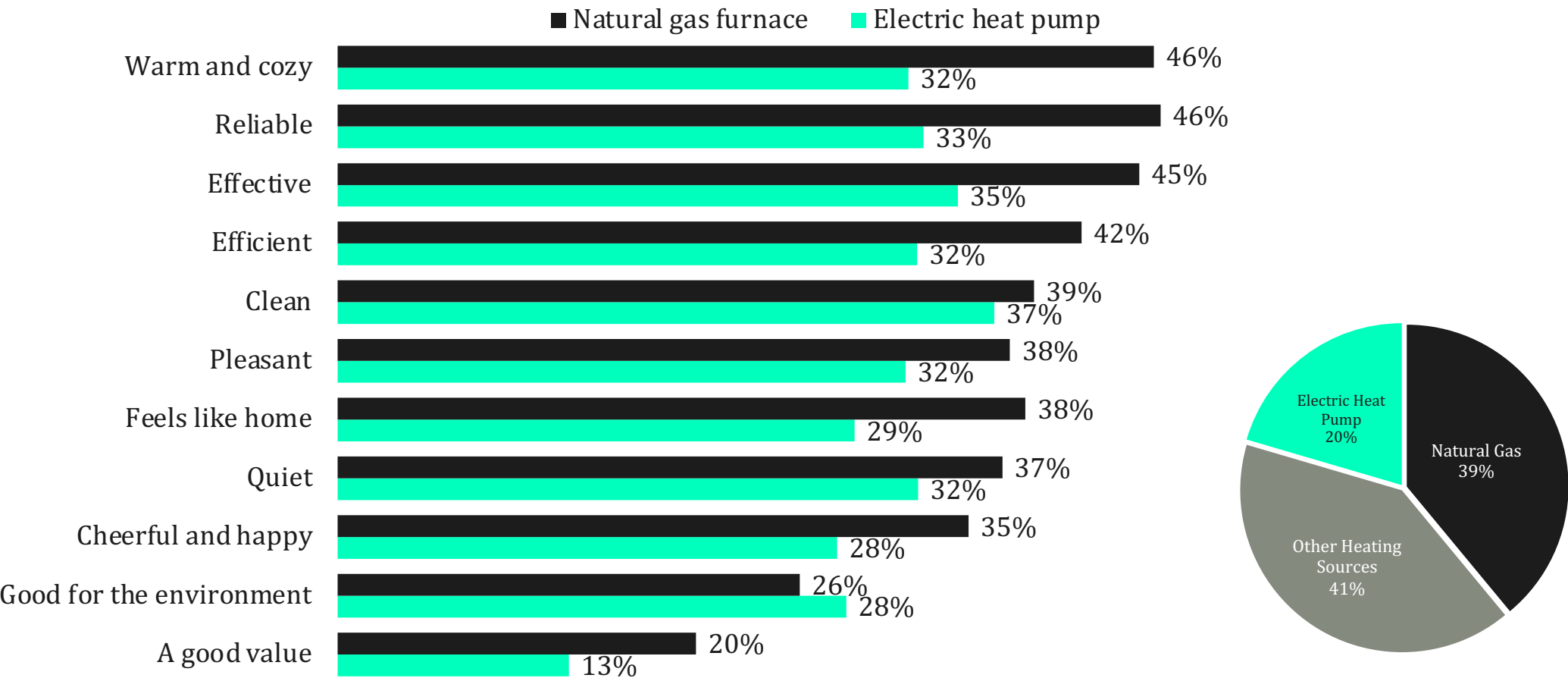
But here's a surprising thing...

Natural Gas is viewed
the *most positively*,
even by those that
don't use it.

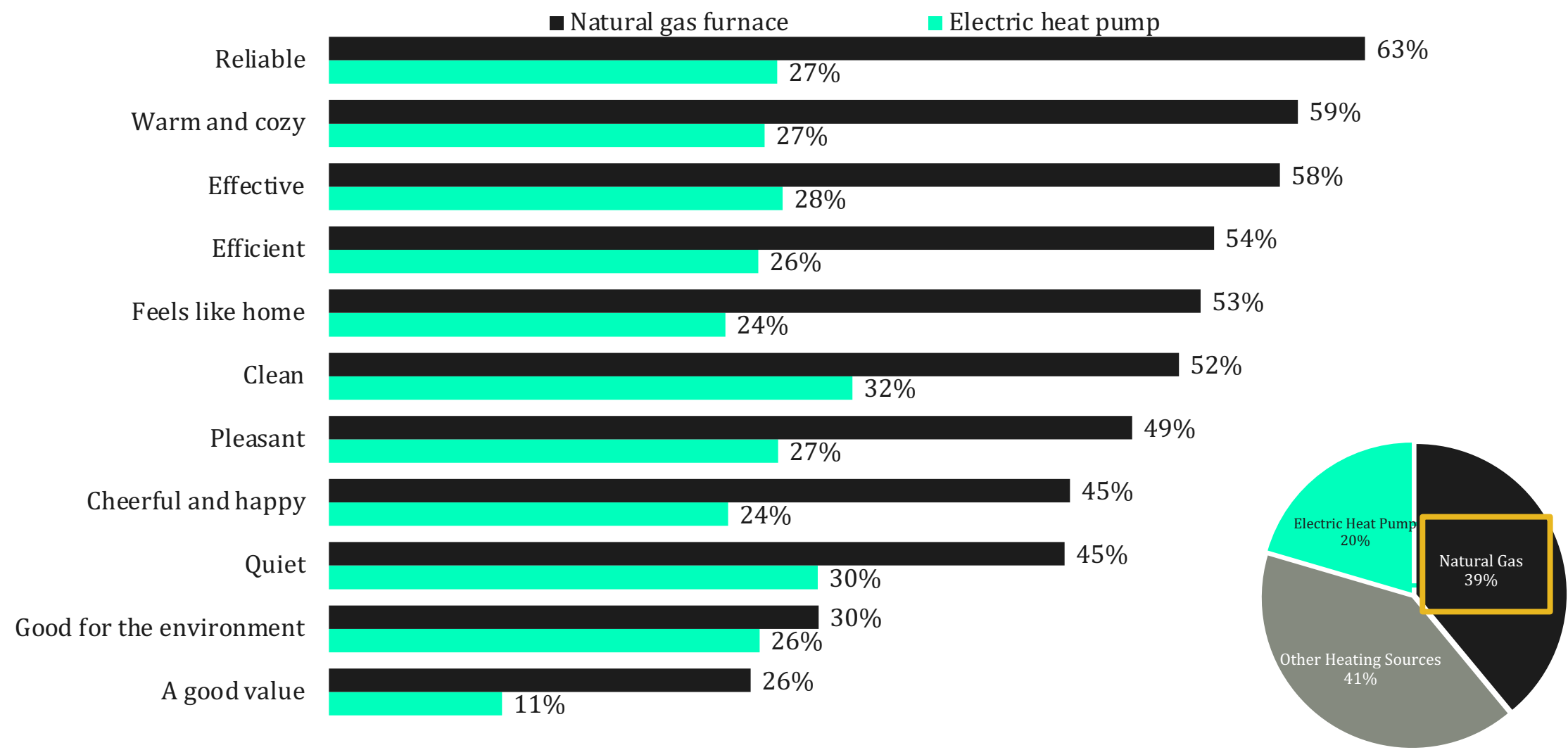


Among all consumers, natural gas wins on almost all benefits, including emotional connections like “warm and cozy,” “feels like home,” and “cheerful and happy.”

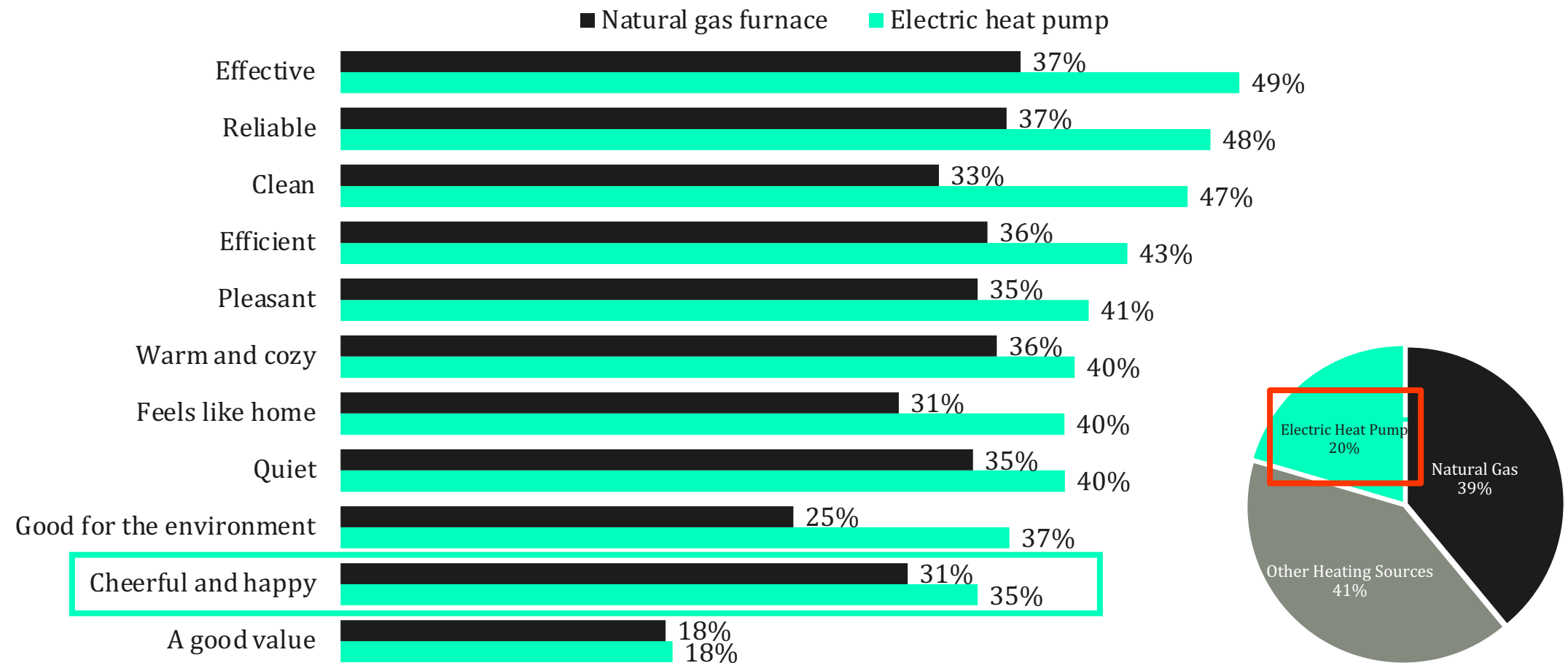
Viewpoint of all consumers about each heating source, regardless of which heat source they actually use:



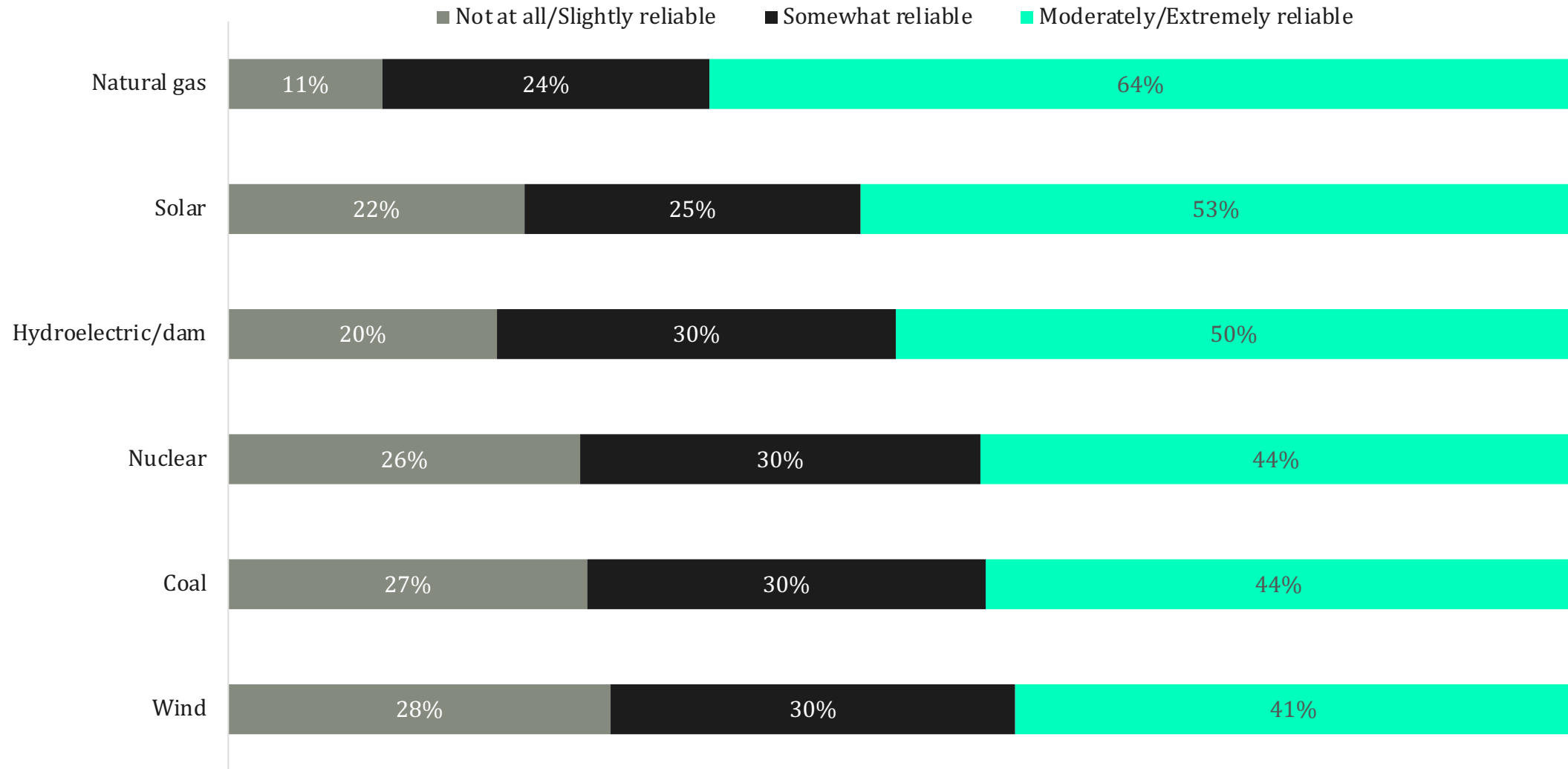
These benefits are seen as even greater among those who use natural gas.



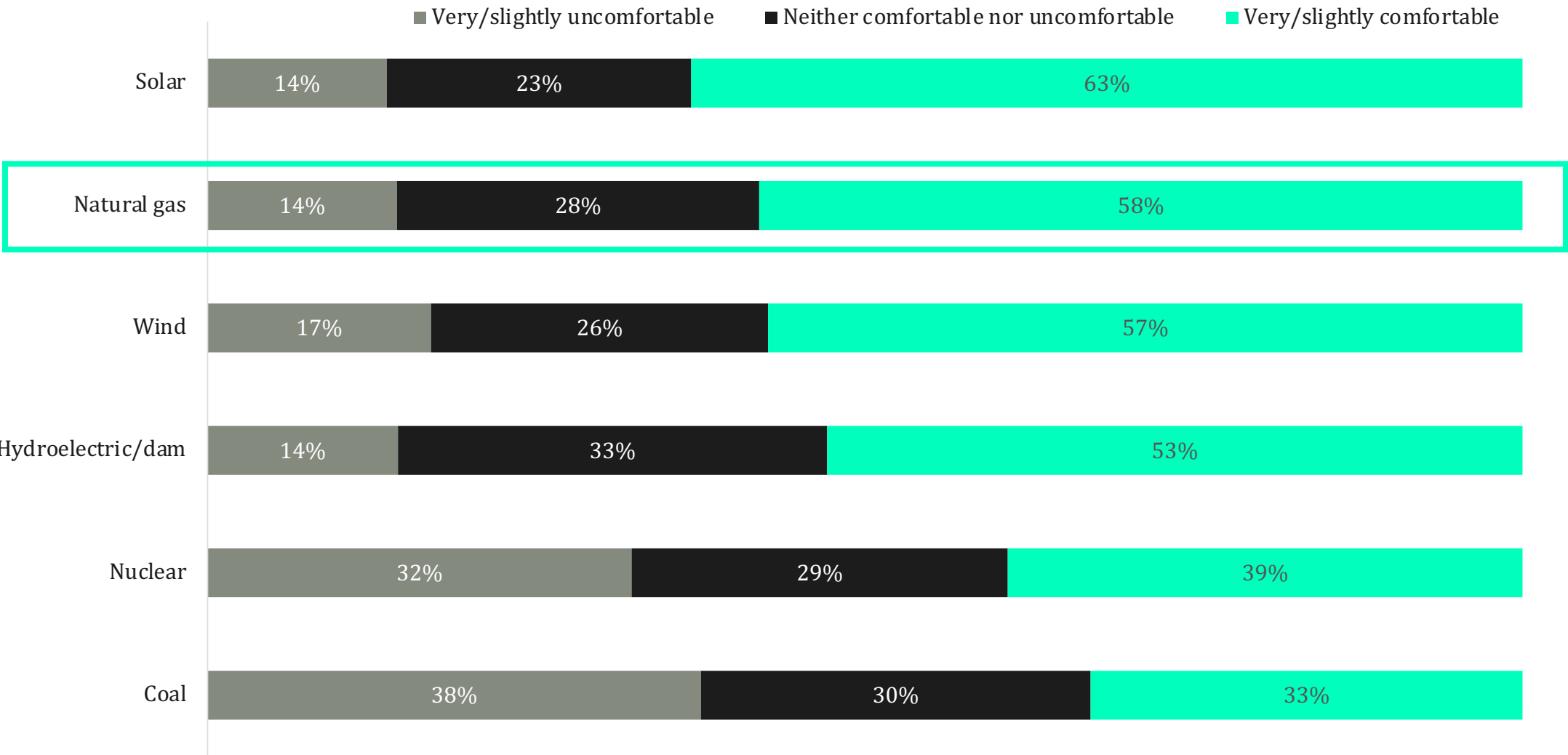
And while **electric heat pump users** feel better about their power source over natural gas (except for when it comes to value, where the two sources are tied), **they're not as enthusiastic about electric heat pumps as natural gas users are about natural gas.**



All consumers consider natural gas to be the *most reliable* energy source.

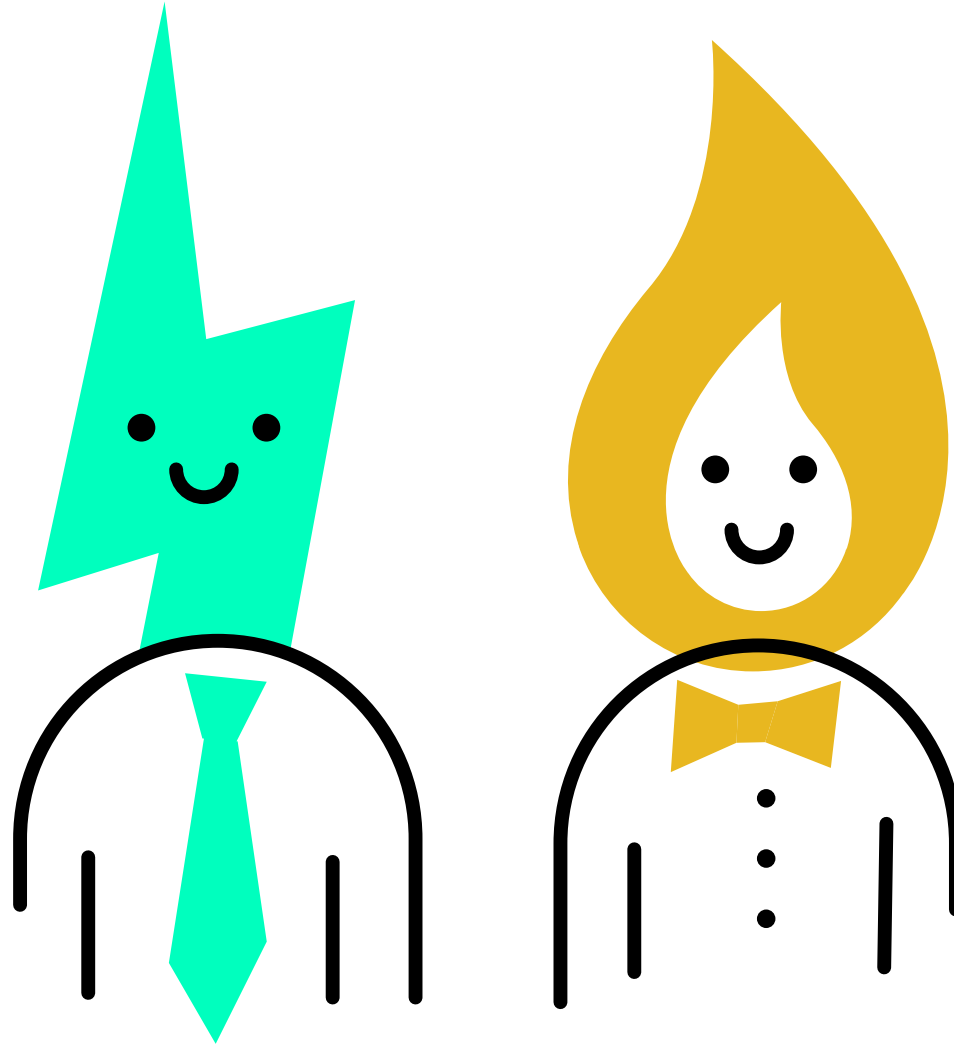


And they're very *comfortable* with having some or all their energy generated by natural gas (second only to solar).



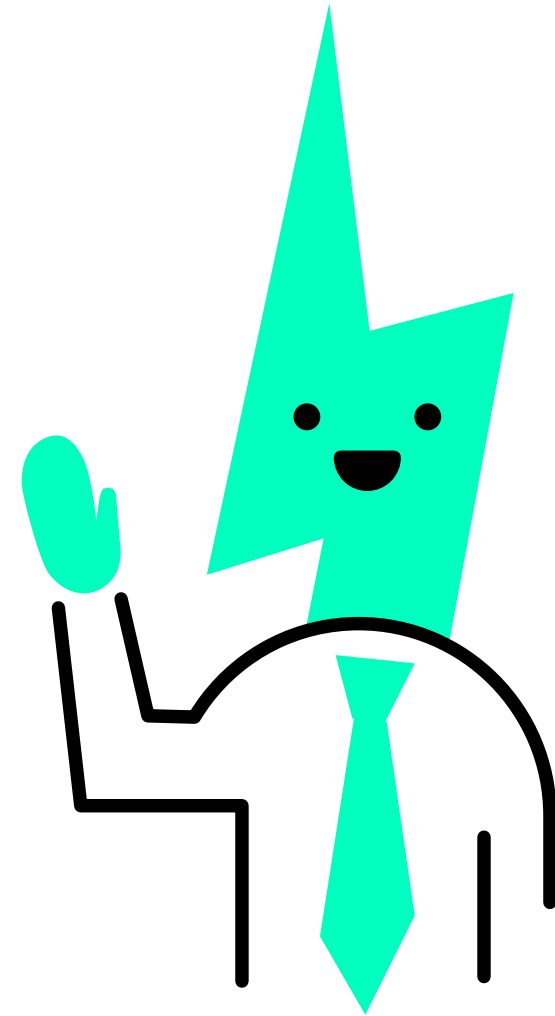
All that to say:

Electric heat
pump users
like their heat
source...



while
natural gas
users *love*
theirs.

So how do we get people who are so attached to natural gas to switch to electric so we can make the energy transition?



To answer this, we thought about other things
in life we're attached to:

relationships

pets

cars

hobbies

sports teams

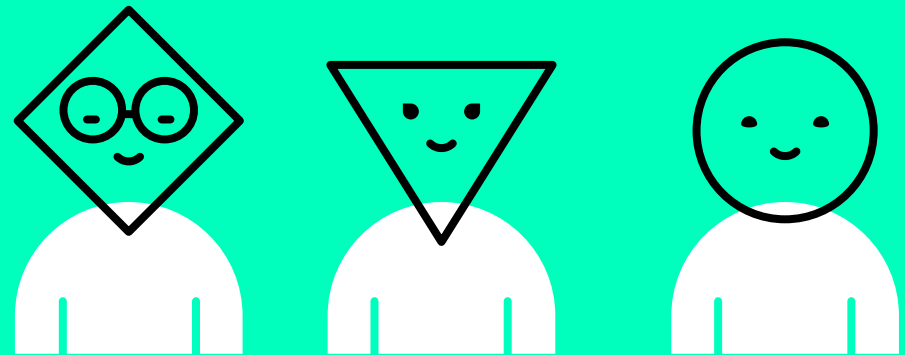
television shows...



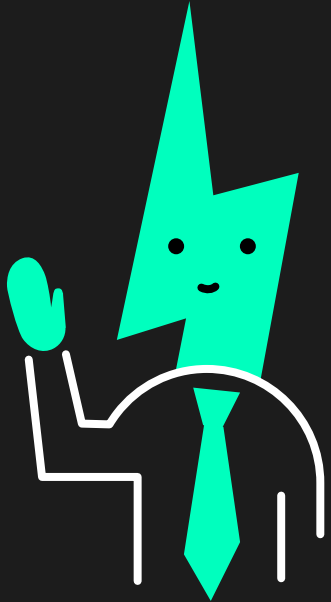
But we had to dig deeper. What else meets people's needs but could potentially be replaced by something better?

And then it hit us...

JOBS.



So, in this work, we'll explore this strong attachment to natural gas through the theme of employee recruitment, where natural gas users currently work with "Natural Gas, Co." and are potential recruits for "Electrification, Inc."

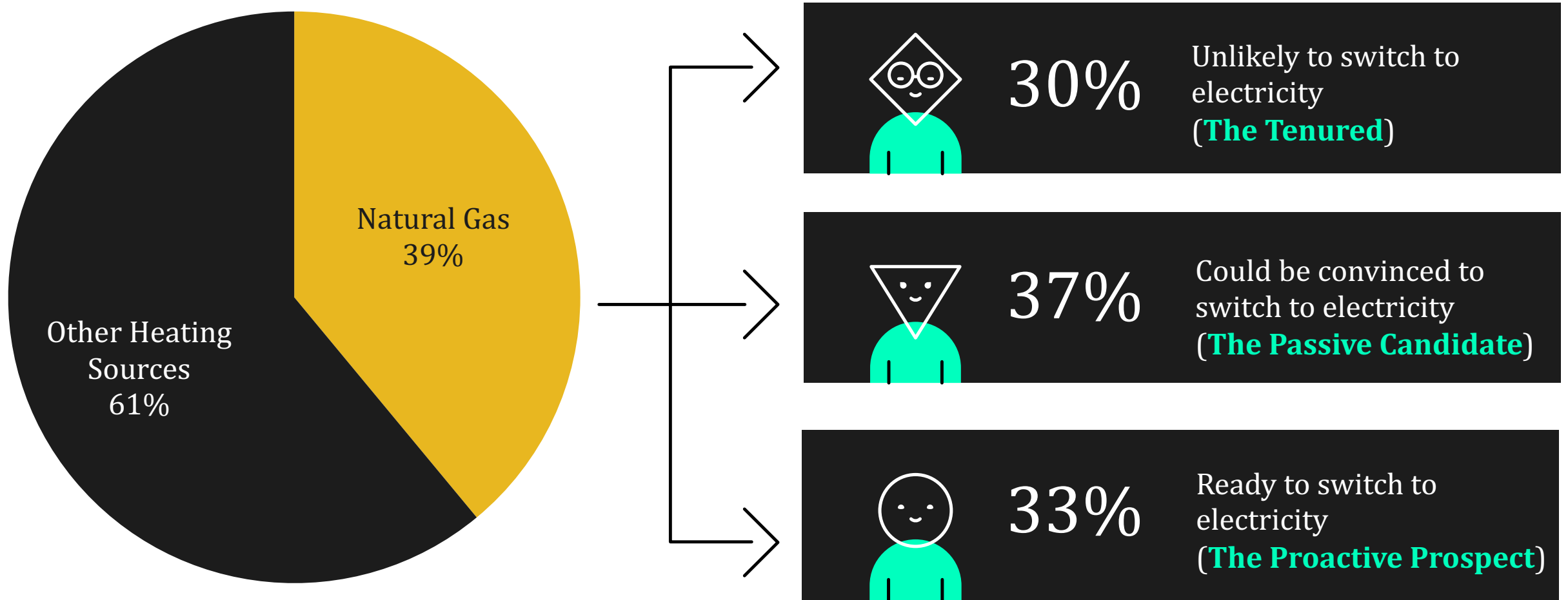


For Electrification, Inc. to grow, they'll have to recruit some natural gas users (or Natural Gas, Co. people) who make up 39% of the U.S. population.

Let's learn more about
Natural Gas, Co. to
understand who we're
talking to in our
Electrification, Inc.
recruitment campaign.



Natural gas users fall into three distinct segments.





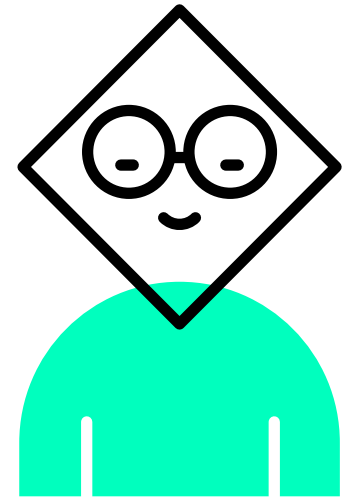
The Tenured

THEY VALUE THE COMFORT AND FAMILIARITY
OF STAYING WITH NATURAL GAS, CO.

You know the ones. They have 'institutional knowledge.' They say things like 'we've always done it this way' or 'we tried that one time but...' and 'remember when' - but you don't, because it was a decade before you were hired.

They're walking handbooks, could do what they do with their eyes closed, and are comfortable, confident and trusted.

Bottom line? It's going to be hard for Electrification Inc. recruiters to pull Tenureds away from their familiar, comfy, longstanding position. They are unlikely to leave natural gas willingly.





Unlikely to switch to electricity: **The Tenured (30%)**

Our “not switching” group is natural gas all the way. It would be difficult (but not impossible) to get them to switch to electric. The Tenured are older, more likely to be Caucasian, and not as likely as other groups to believe in climate change. They’re unlikely to have kids in the household and are likely to be retired and have an older home.



Homeownership

87% Own their homes



Age of Home

25% Less than 20 yrs

75% More than 20 yrs



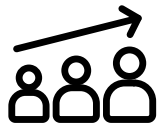
Gender

53%  47% 

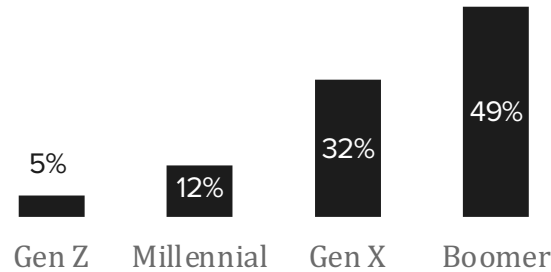


Kids in the HH

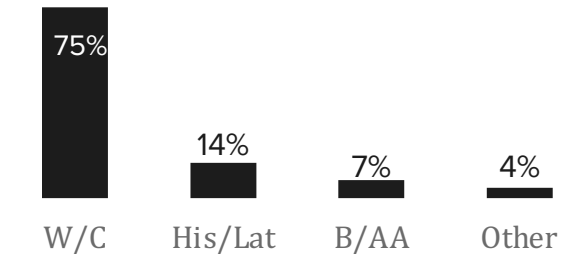
25% have kids



Age Cohort



Ethnicity



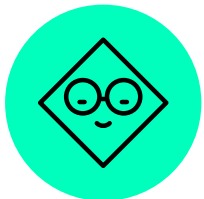
Household Income

42% have a household income greater than \$75,000



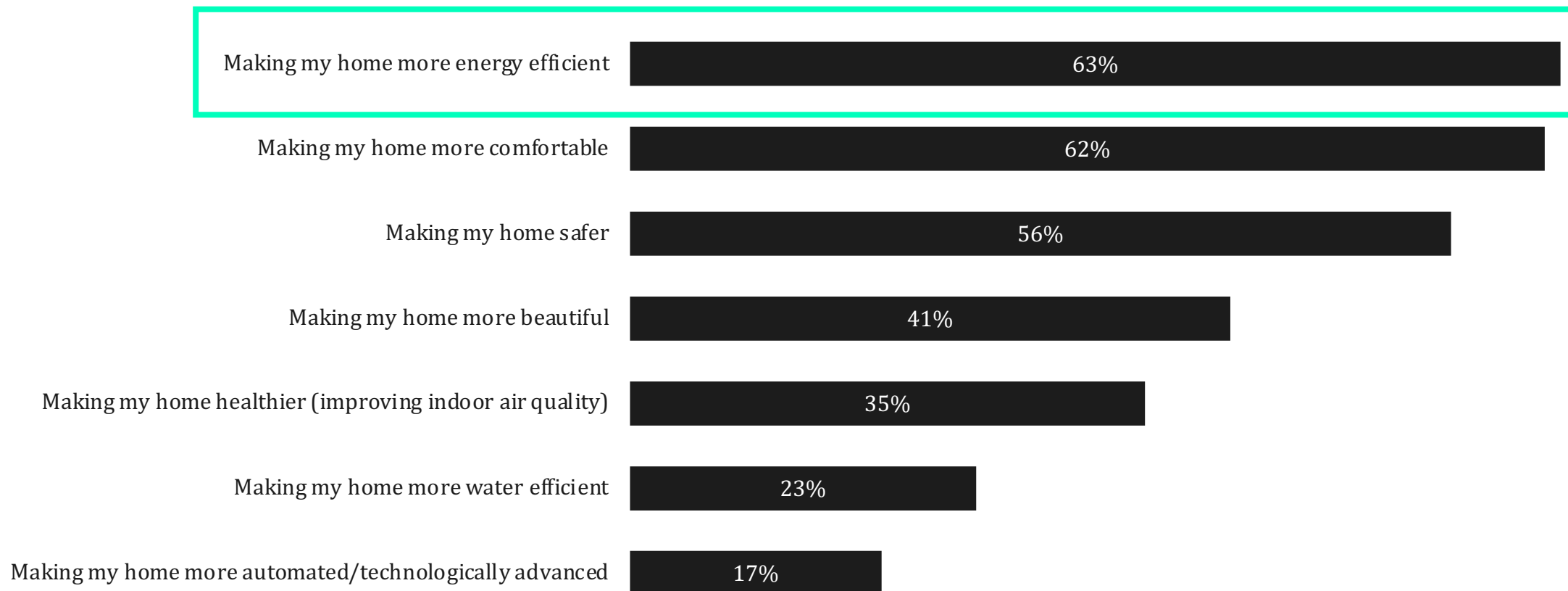
Belief in Climate Change

57% Agree climate change is occurring and is primarily caused by human activity



Their top priority for home expenses is making them more energy efficient.

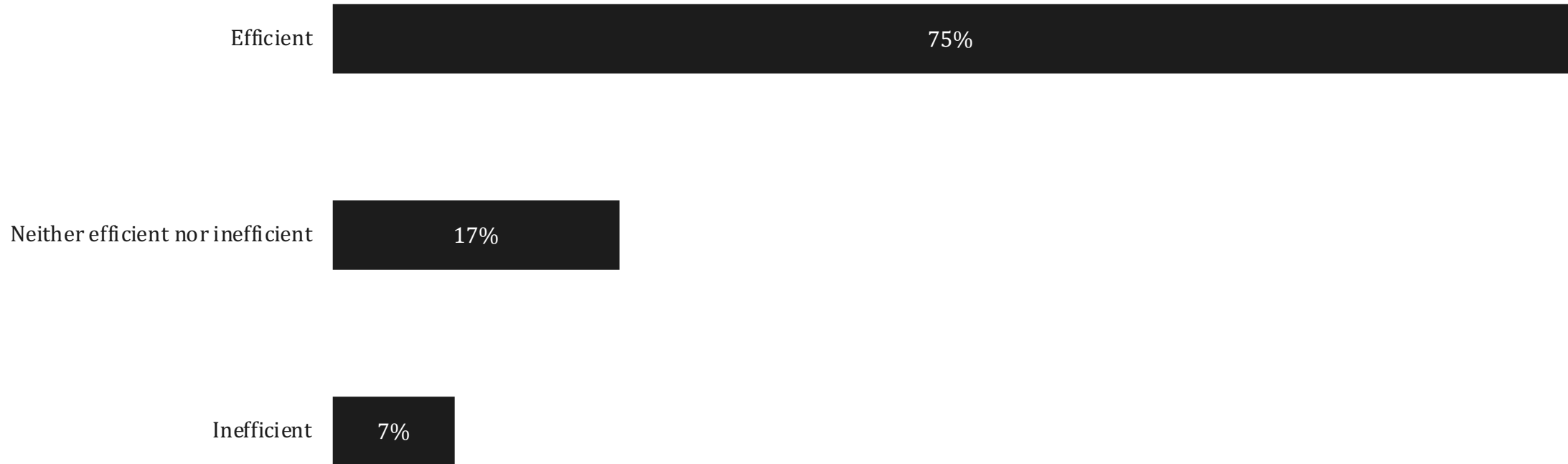
■ The Tenured





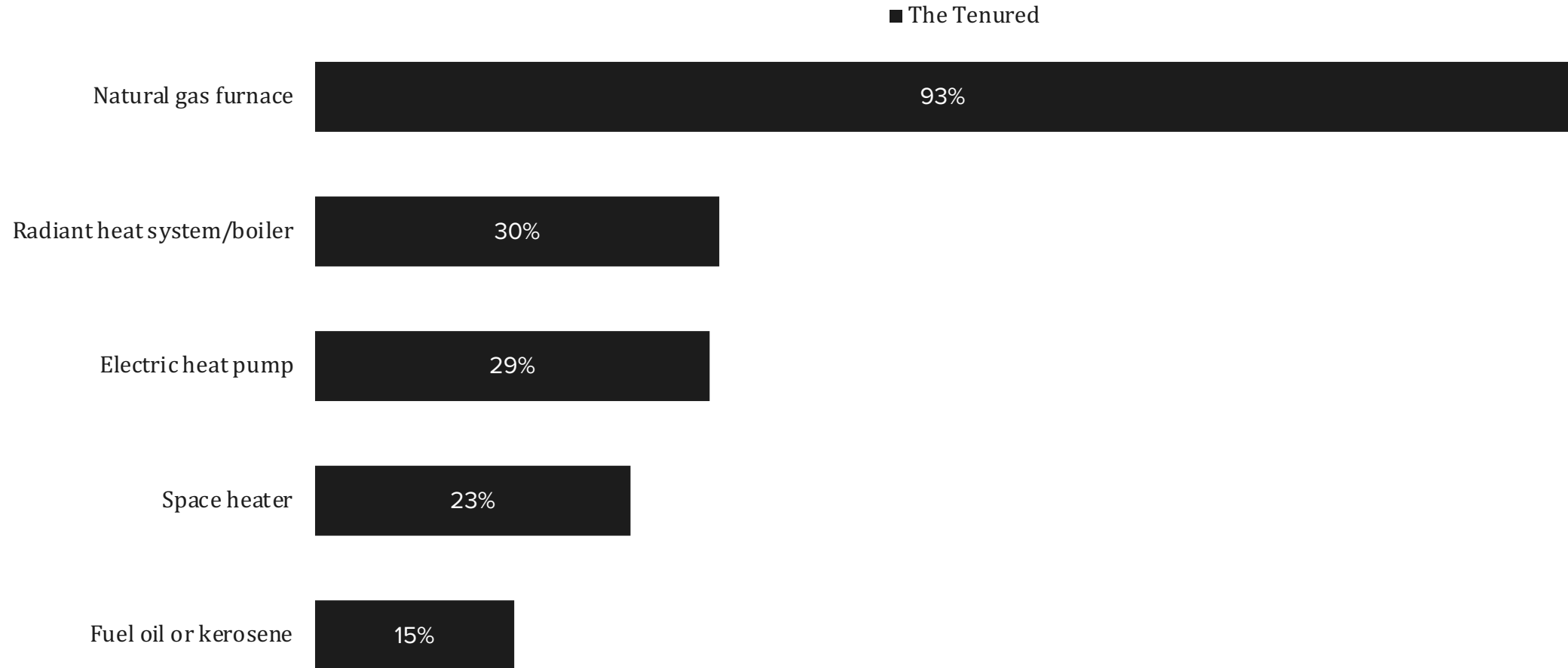
And they believe strongly that their homes are already energy efficient (so they probably don't feel the need to spend much more on them).

■ The Tenured





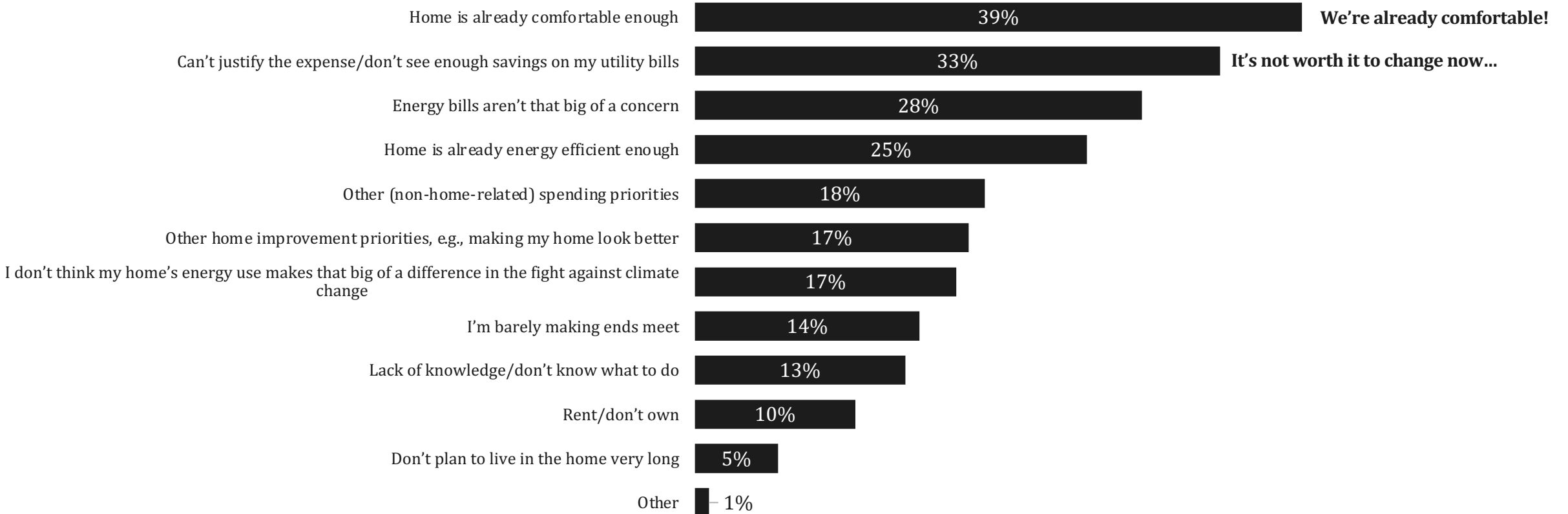
Even more than that, Tenureds believe a natural gas furnace is the most efficient (and since efficiency is their top priority, why switch?).





Tenureds like that old-shoe comfort they find in the status quo. It's what's kept them from making more energy efficiency improvements to their homes.

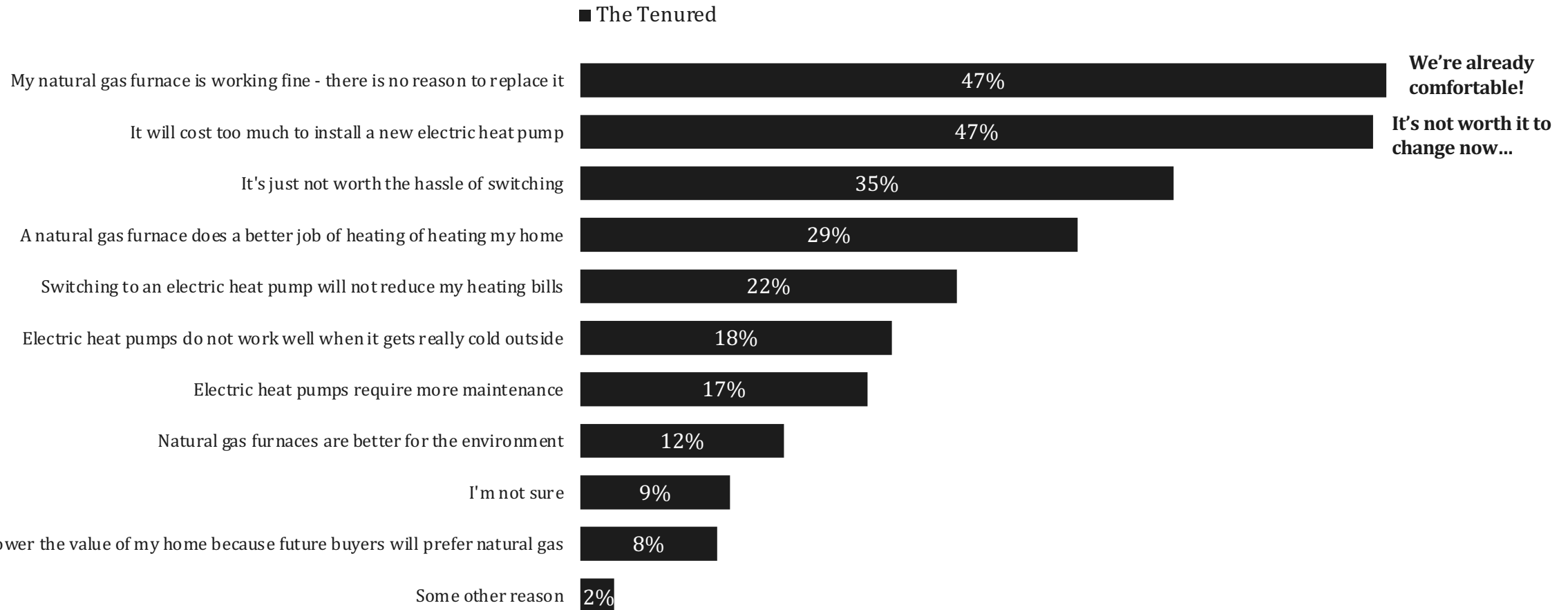
■ The Tenured



Source: Energy Pulse® 2023, Q28: What are the top reasons you haven't made more energy-efficient home improvements?
Tenureds n=231, Passive Candidates n=291, Proactive Prospects n=258



And the same goes for their reluctance to consider a heat source other than natural gas. If there's no real reason to switch, why take on the expense and hassle?



Source: Energy Pulse® 2023, Q18: Which of the following concerns do you have about switching from a natural gas furnace to an electric heat pump?
Tenureds n=82, Passive Candidates n=215, Proactive Prospects n=198



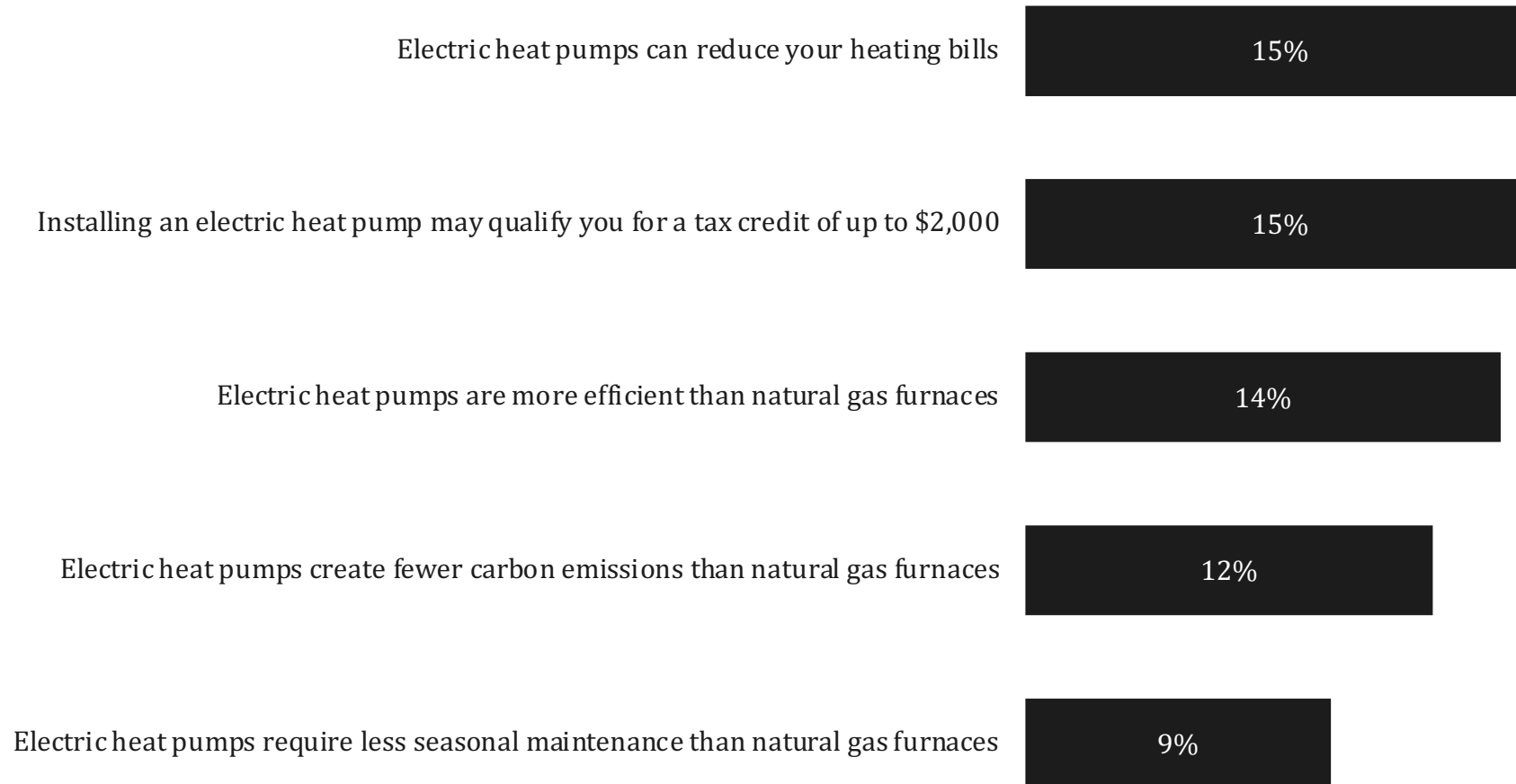
Given how comfortable this group is at Natural Gas, Co., they don't make the best recruits.

But rebates are appealing to a very small group of our Tenureds, and could make them consider Electrification, Inc.

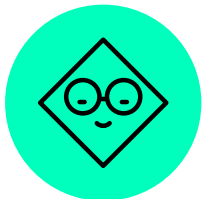


Up to 15% of Tenureds would consider joining Electrification, Inc. with the right financial benefits.

■ The Tenured

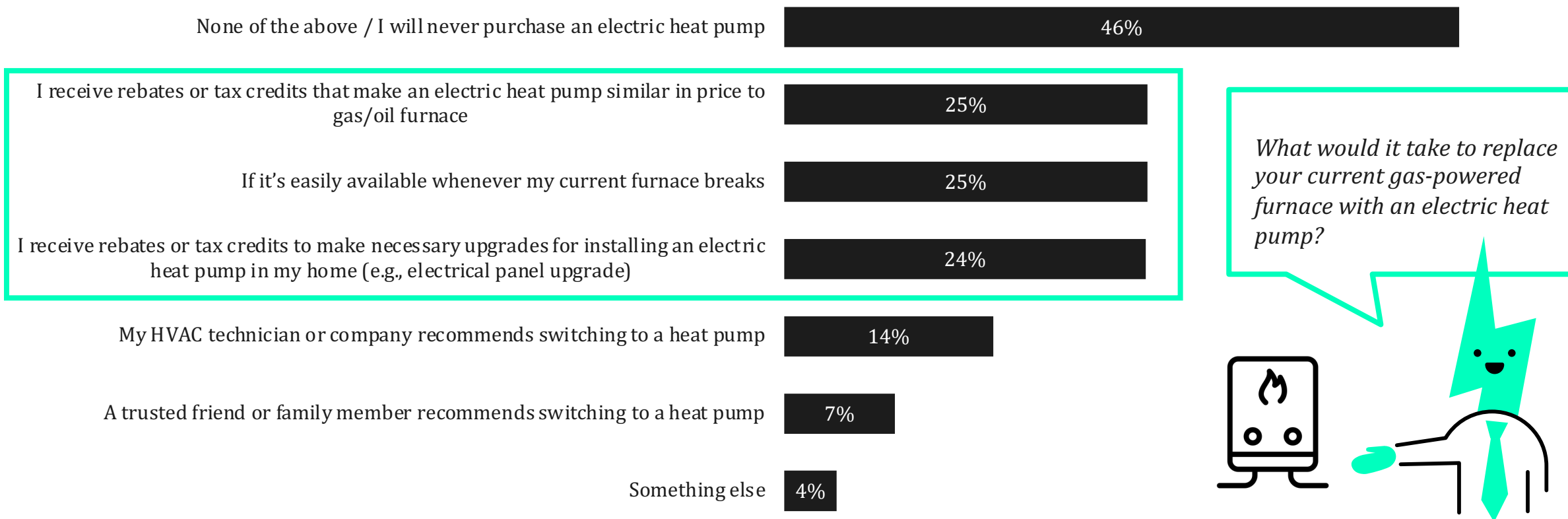


Source: Energy Pulse® 2023, Q19. Earlier you indicated using a natural gas furnace as the primary method for heating your home. How do the following considerations affect your interest in switching from a natural gas furnace to an electric heat pump? Tenureds n=231, Passive Candidates n=291, Proactive Prospects n=258



When it comes to their furnace, the only things they might budge for is easy availability or rebates and credits.

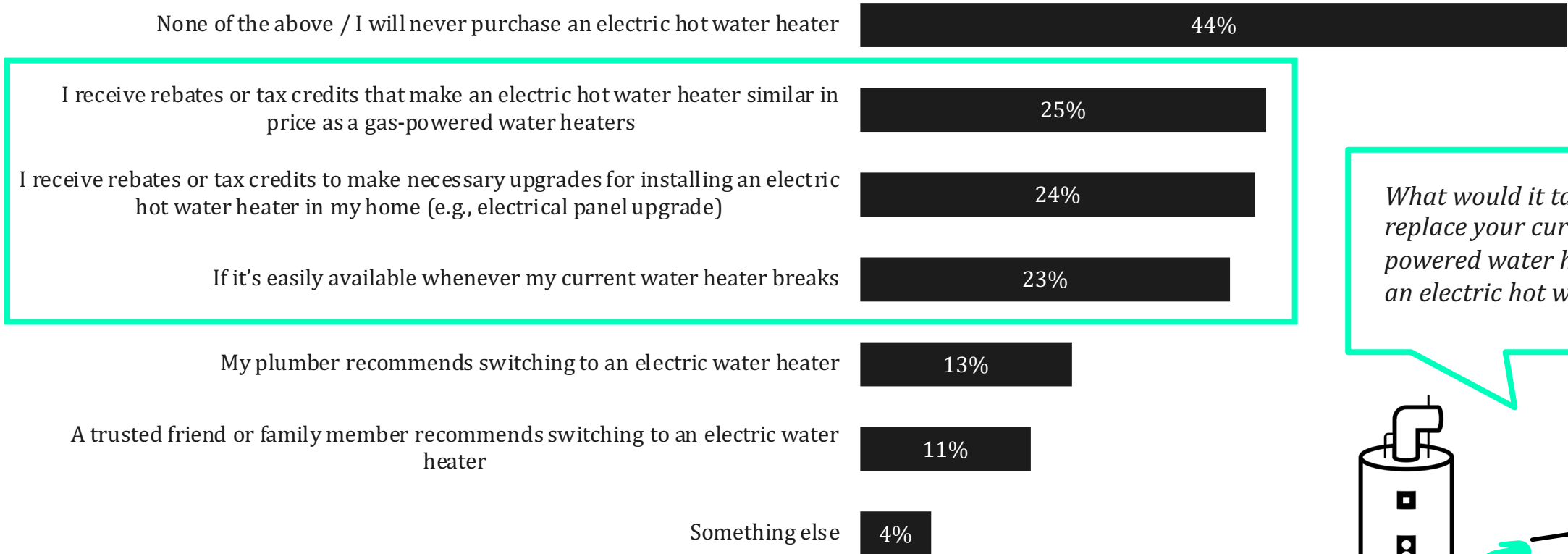
■ The Tenured



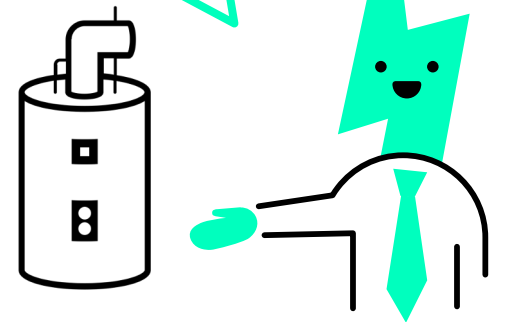


We see the same for water heaters:

■ The Tenured



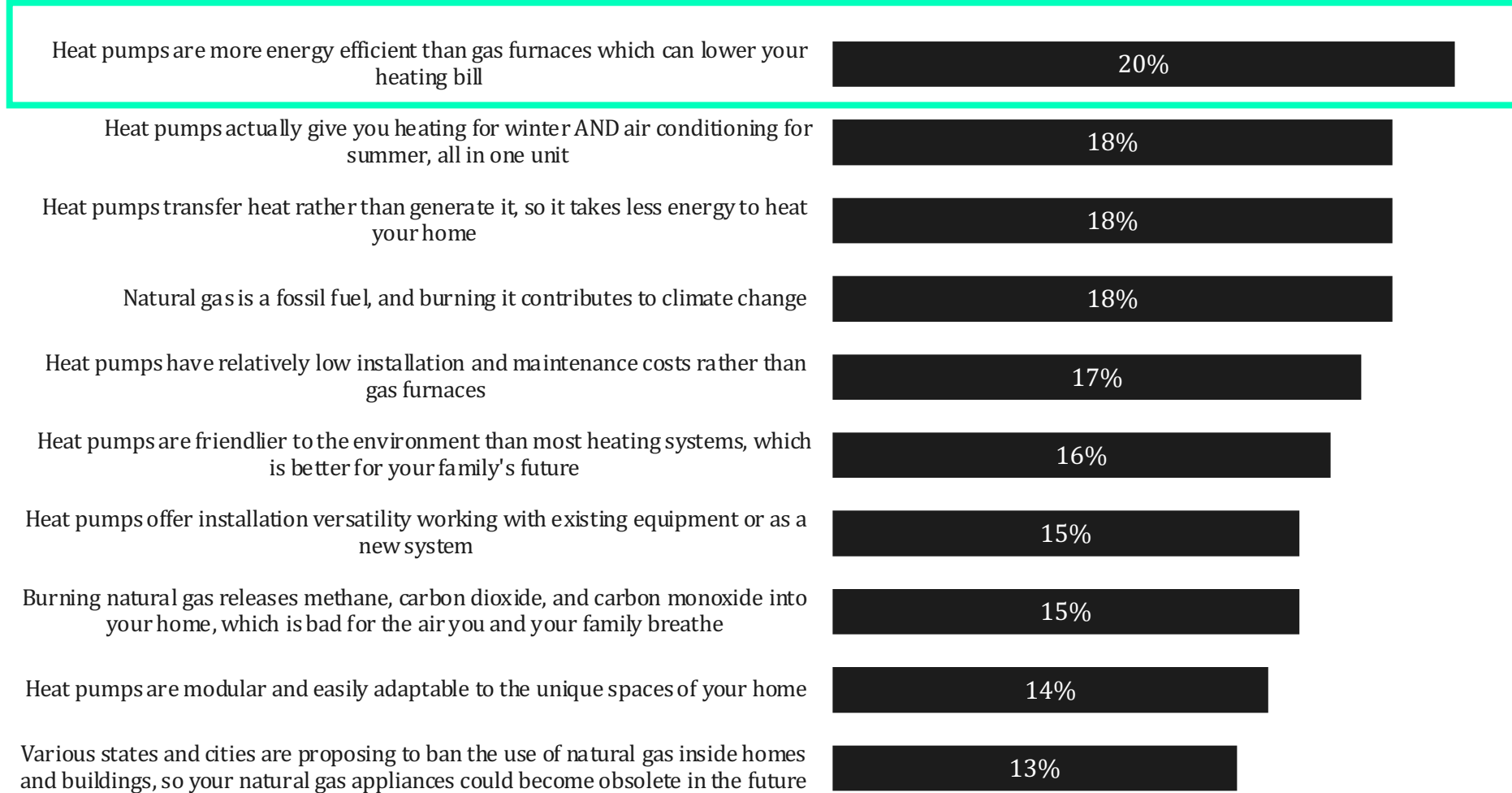
What would it take to replace your current gas-powered water heater with an electric hot water heater?





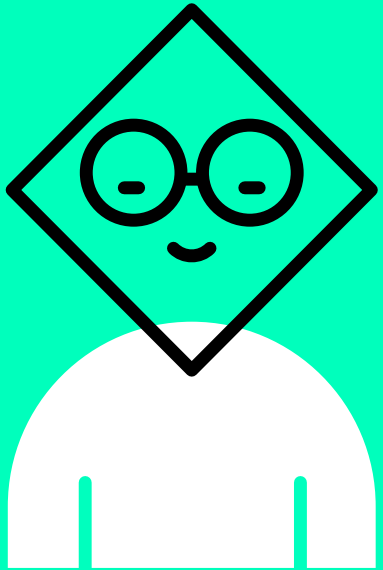
When it comes to advertising messages, Tenureds still show reluctance to switch. But increased efficiency to lower bills appeals to a small group of them.

■ The Tenured



Recruitment profile:

The Tenured



Our Tenured segment has very low interest in being recruited for Electrification, Inc. They are devout natural gas users. Most own their own homes and have for many years. They have a household income over \$75,000 and only a quarter have kids in the home.

My motto: “If I'm happy, why would I leave Natural Gas, Co.? It's inconvenient and likely not worth the hassle.”

Looking for: Comfort, efficiency, no-muss-no-fuss.

Current concerns: None. I've got good IAQ and energy efficiency, and things are comfortable the way they are.

I might consider Electrification, Inc. if: I'm SUPER financially incentivized, for instance with some great rebates or credits (and if things go wrong somehow with Natural Gas, Co.).



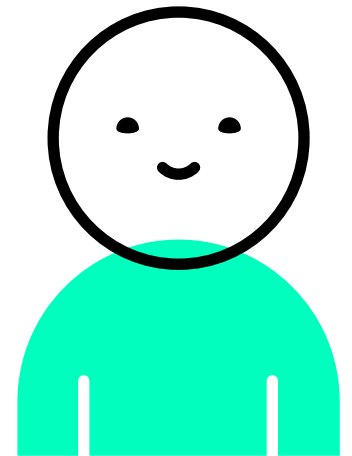
The Passive Candidate

NOT CURRENTLY LOOKING TO LEAVE NATURAL GAS CO.,
BUT NOT OPPOSED IF THE OFFER'S RIGHT.

Our Passive Candidates are reliable and consistent. They do what's required, are comfortable with routine and will accept change from external forces but are unlikely to pursue change on their own.

They like their current situation *enough*. And they think they'd like to keep it, but it's mostly because it hasn't really occurred to them that something better is out there.

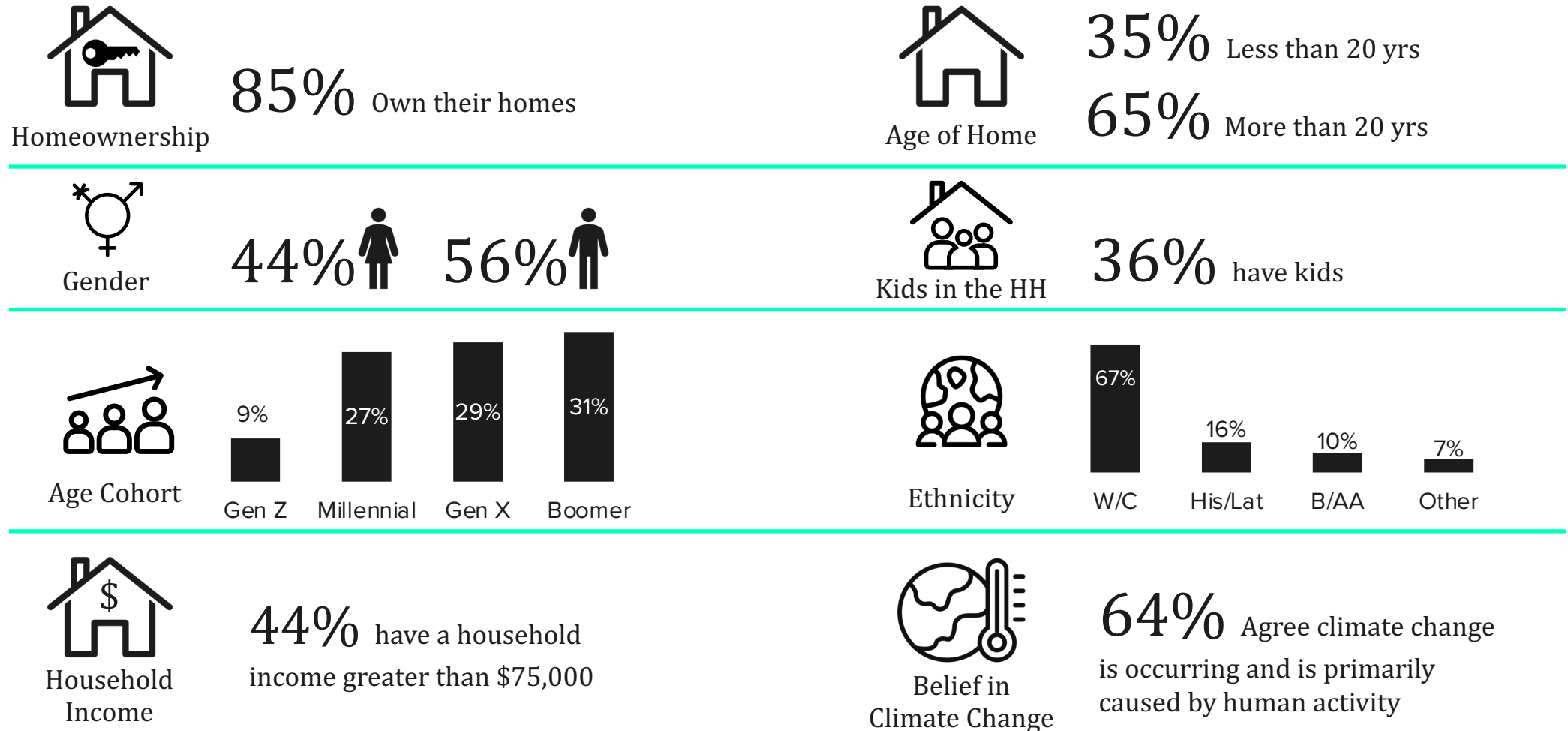
Bottom line? They *can* be recruited, but it will require persistent pursuit and agile convincing.





Could be convinced to switch to electricity: **The Passive Candidate (37%)**

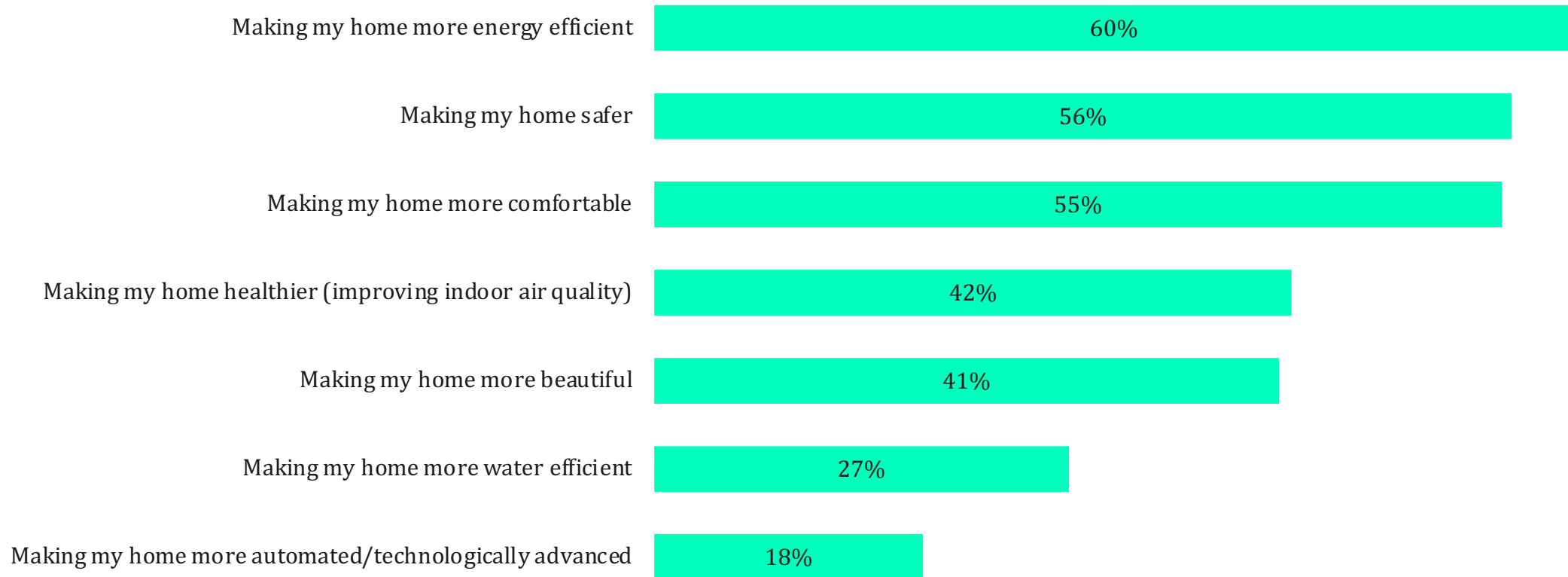
Passive Candidates like natural gas but are willing to consider switching; they could be swayed with the right messaging and incentives. This group isn't so different from Tenured demographically, but have more flexible attitudes about their power source, which is the reason they fall into their own group.





Passive Candidates prioritize energy efficiency, safety and comfort when it's time to spend money on their homes.

■ The Passive Candidate

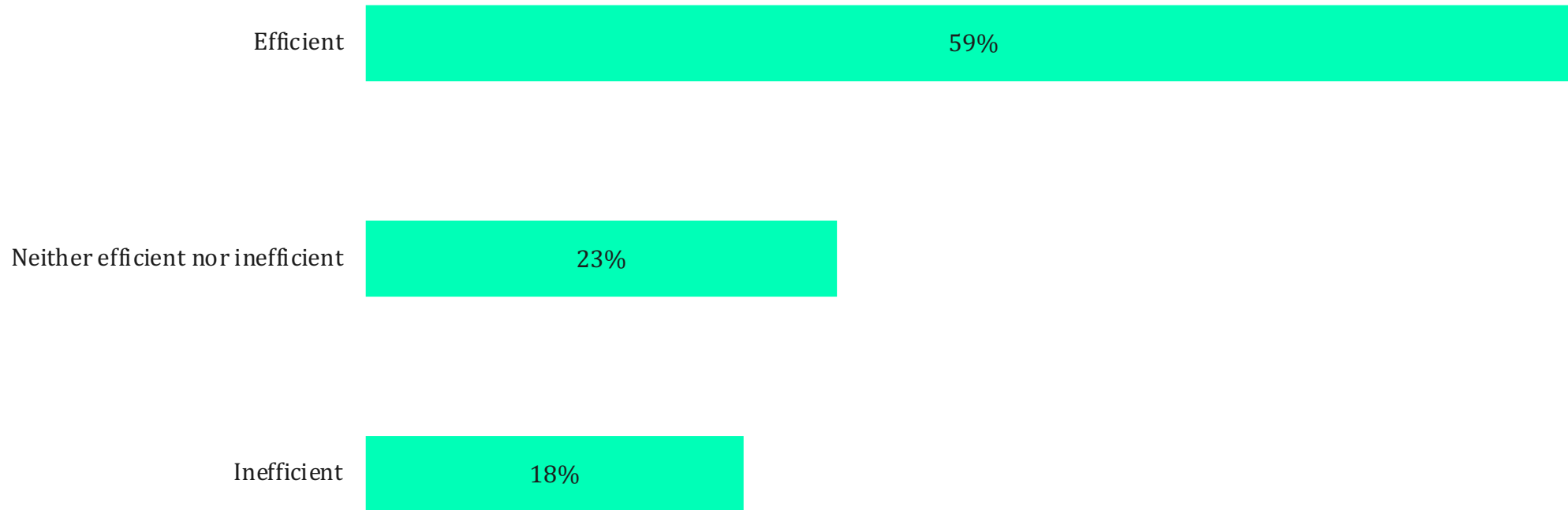


Source: Energy Pulse® 2023, Q1a. Please choose and rank your priorities for spending money on your home – Ranked top three.
Tenureds n=231, Passive Candidates n=291, Proactive Prospects n=258



But over half feel their homes are already energy efficient with natural gas.

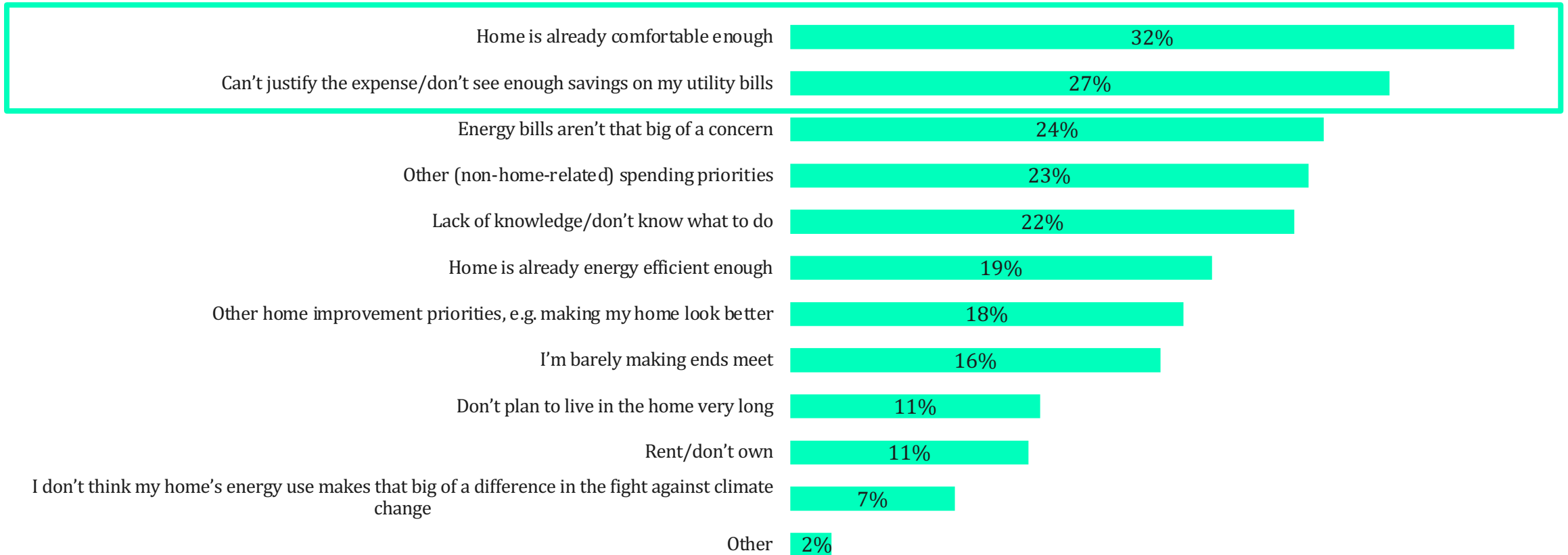
■ The Passive Candidate





Passive Candidates also feel their homes are already comfortable, and don't see a big financial incentive to make any more energy efficiency improvements.

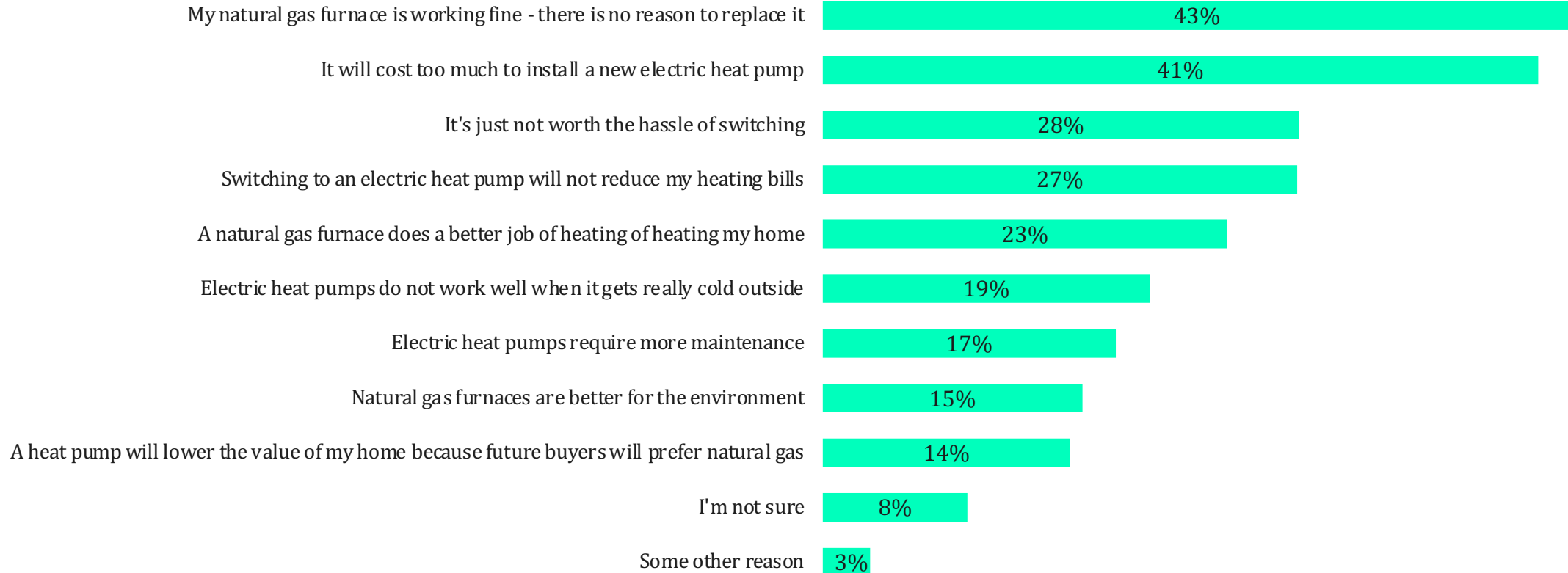
■ The Passive Candidate





Many won't replace a working furnace.

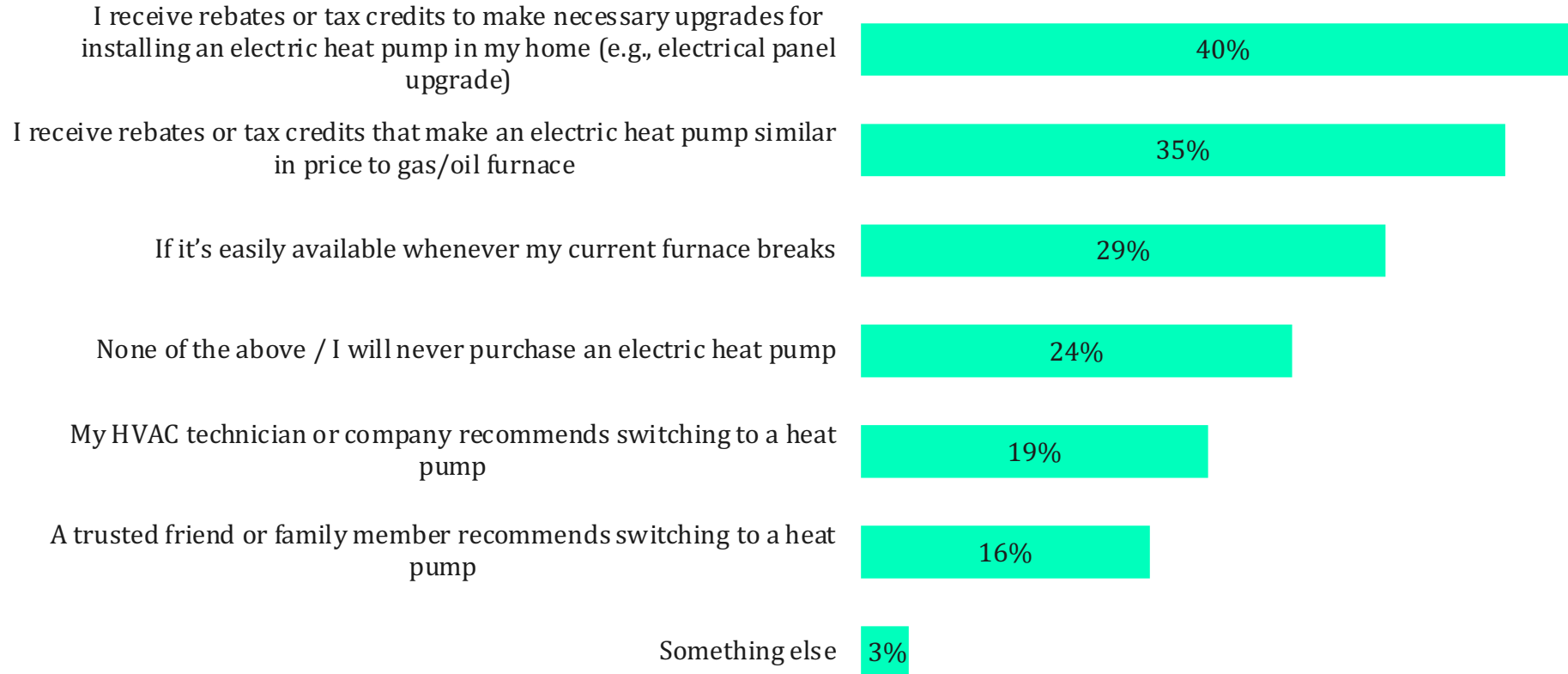
■ The Passive Candidate



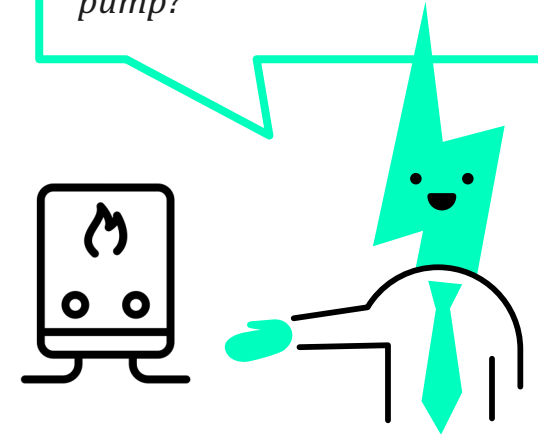


But many are open to switching to an electric furnace if the incentives are right.

■ The Passive Candidate



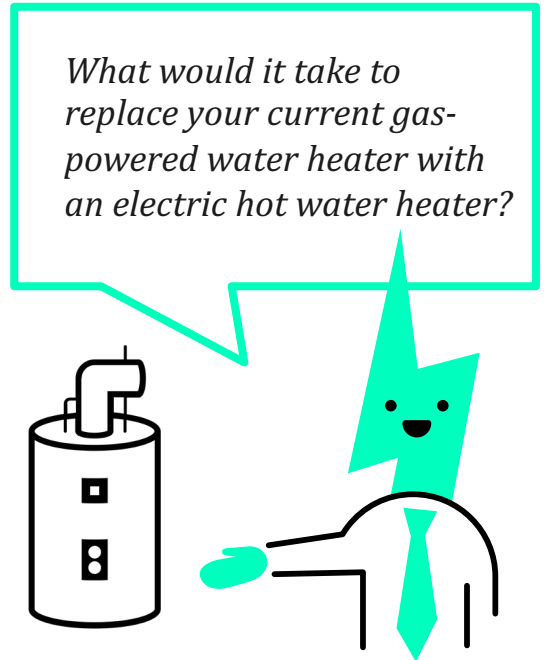
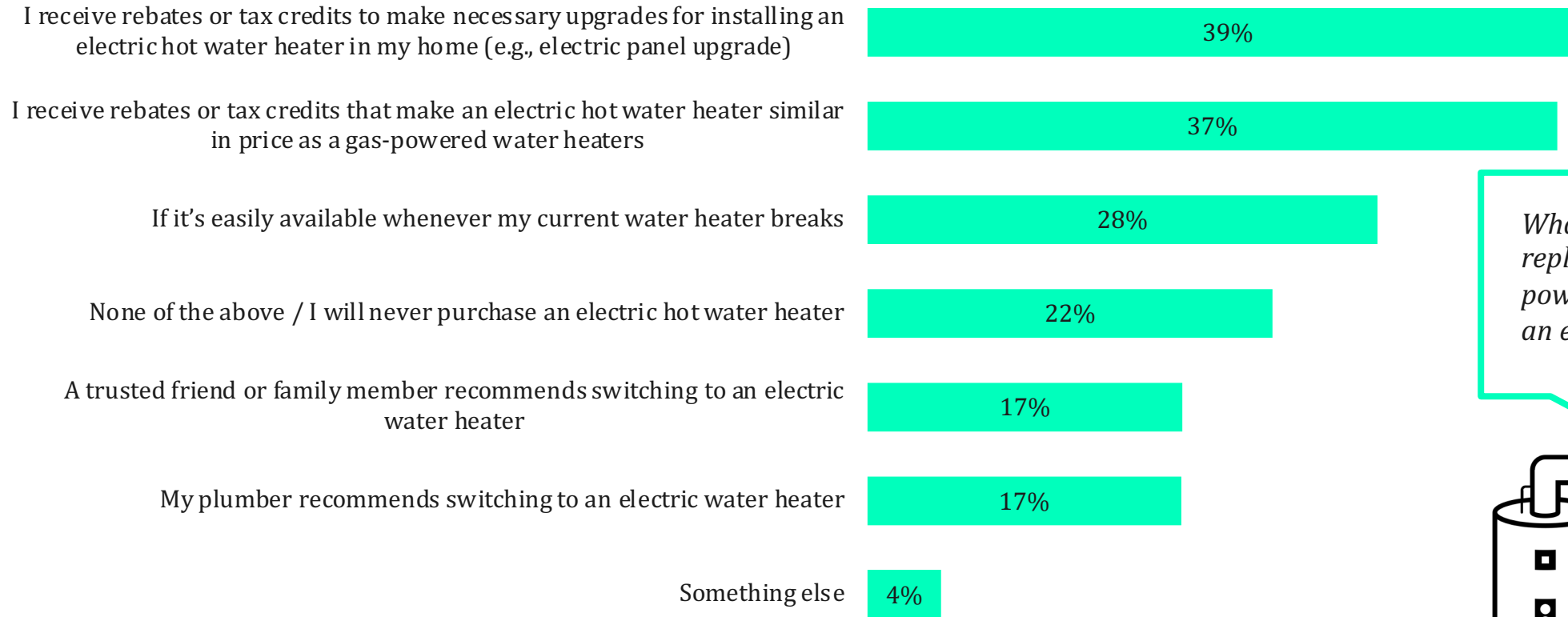
What would it take to replace your current gas-powered furnace with an electric heat pump?





And the same goes for water heaters:

■ The Passive Candidate

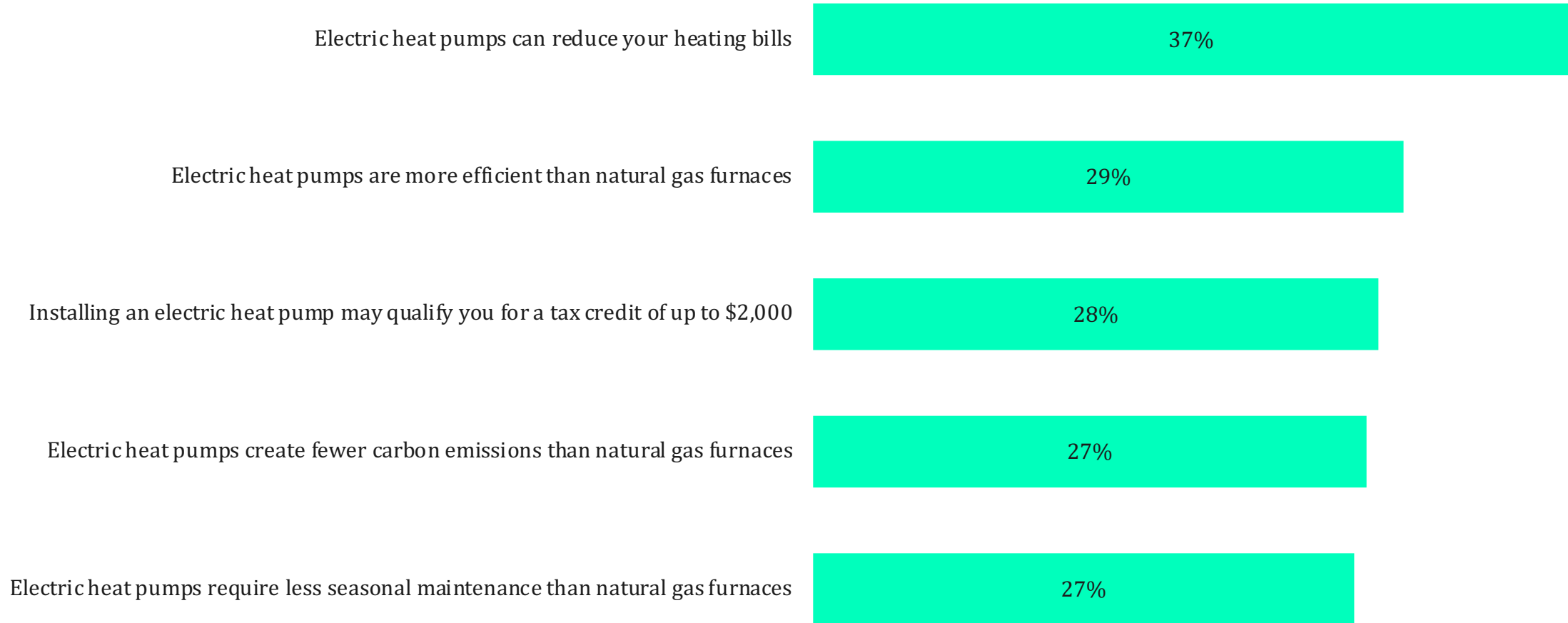


Source: Energy Pulse® 2023, Q63: What would it take to replace your current gas-powered hot water heater with an electric hot water heater?
Tenureds n=220, Passive Candidates n=280, Proactive Prospects n=245



Saving on heating bills, while not exactly a new or exciting idea, is definitely the most appealing benefit of joining Electrification, Inc.

■ The Passive Candidate



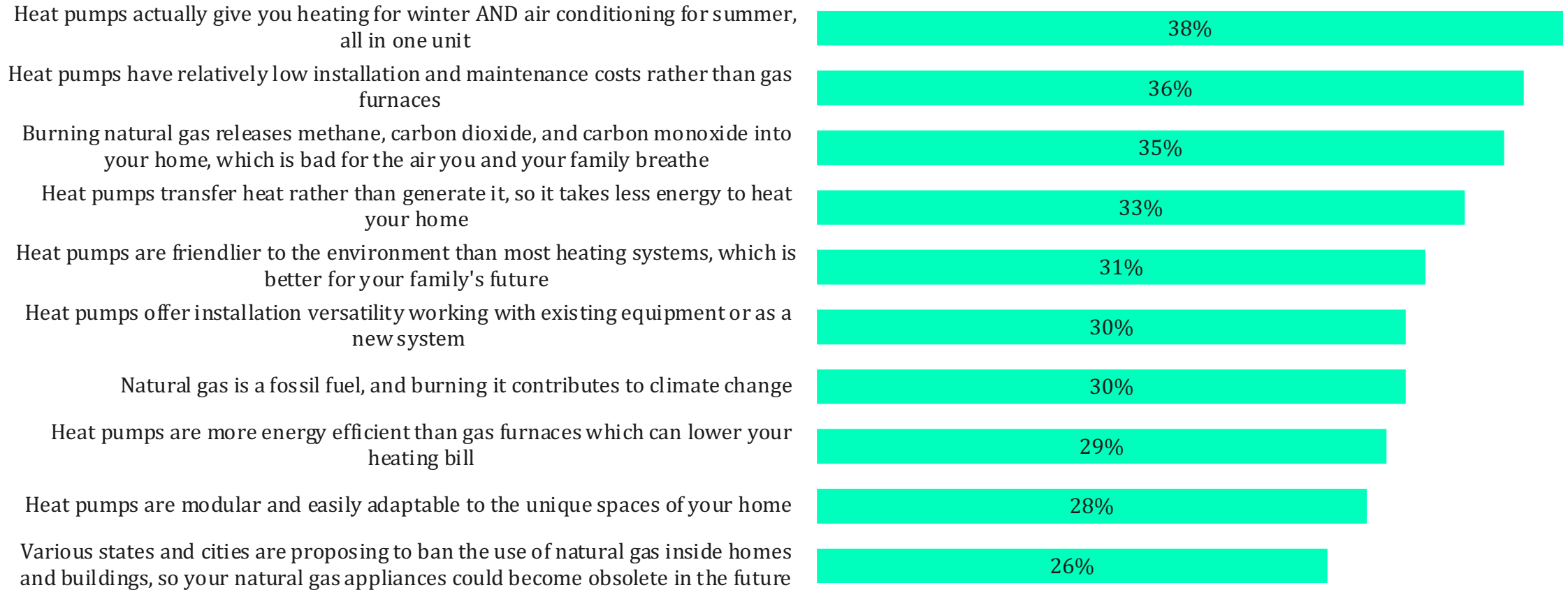


Interestingly, though, this group finds a wider range of benefits appealing, which can help recruit them to Electrification, Inc.



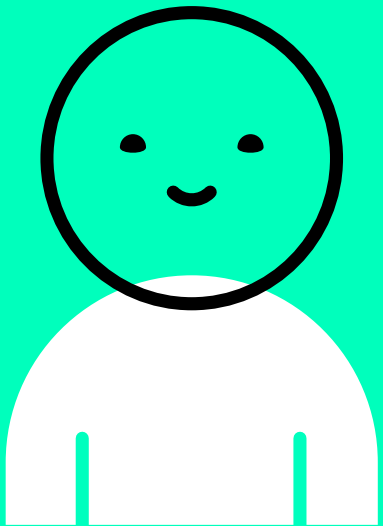
When it comes to advertising messages, "two for one," low-cost installation & maintenance and better IAQ resonated the most. These top messages combined with a **hefty benefits package (tax credits and rebates)** could get this group to switch.

■ The Passive Candidate



Recruit profile:

The Passive Candidate



Our Passive Candidates are slightly younger, with slightly lower home ownership and length of homeownership stats than the Tenureds. Less than half earn \$75,000 or more. They have the same priorities as Tenureds and 59% feel their homes are already efficient.

Money is a concern for this group, but they have a greater interest in hearing about a range of benefits, making them potential recruits for Electrification, Inc.

My motto: “I like where I'm at, and I'm not necessarily looking for something new. But I'm not opposed to hearing about a promotion opportunity with great benefits if it comes my way.”

Looking for: The money-conscious choice, but also efficiency, year-round comfort and good IAQ.

Current concerns: Energy efficiency and IAQ *could* be better, and if there's an easy alternative that's low maintenance and affordable, I'd be interested in hearing about it.

I might consider Electrification, Inc. if: Switching is easy, affordable and I can learn all the ways Electrification, Inc. is actually better than Natural Gas, Co.



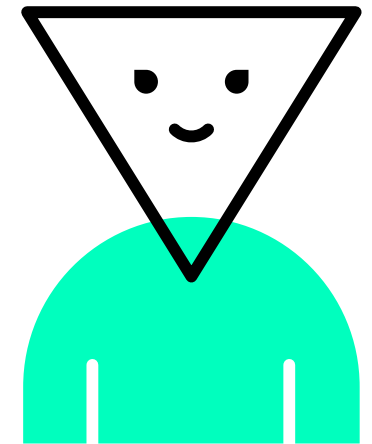
The Proactive Prospectors

NOT ATTACHED TO NATURAL GAS, CO. BUT NOT CONFIDENT ENOUGH ABOUT POTENTIAL BENEFITS TO MAKE A CHANGE.

Driven and inquisitive, Proactive Prospectors are constantly learning new things. They are engaged, but their current situation is likely a stepping stone as they gain experience. They are willing to try new things, have loads of ideas and regularly consult with others to gather information and insights.

They believe better is out there, but confidence is the main thing holding them back. They're just not sure that they know enough to move up to something better, although they might already be searching for it.

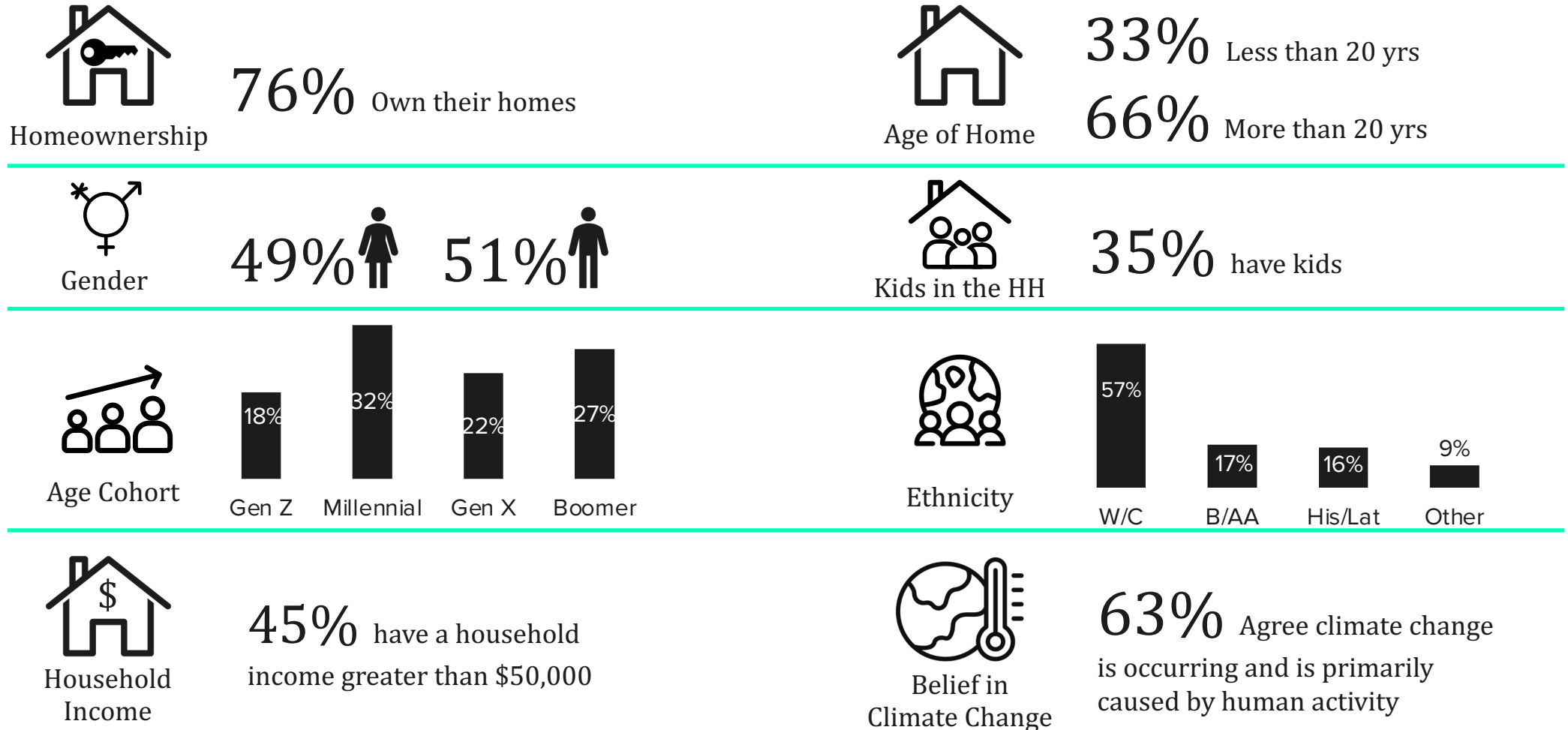
Bottom line? This group is the most likely to become new recruits. Electrification, Inc. will just have to make Proactive Prospectors very confident about the switch to recruit them successfully.





Ready to switch to electricity: **The Proactive Prospector (33%)**

This group isn't necessarily loyal to Natural Gas, Co.; they are good recruitment candidates for Electrification, Inc. Proactive Prospectors are younger, more diverse and more likely to have kids in the household.





Over 1/3 are very concerned about indoor air quality in their homes.

■ The Proactive Prospector

Strongly/Very slightly concerned

36%

Moderately concerned

36%

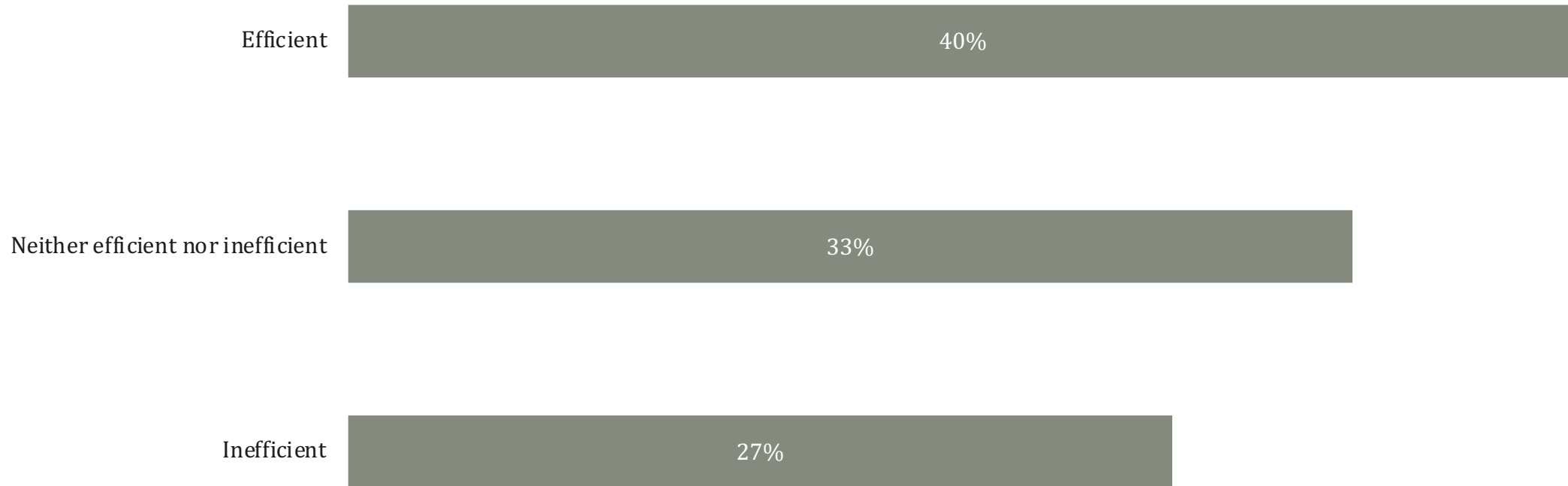
Not at all/Very slightly concerned

29%



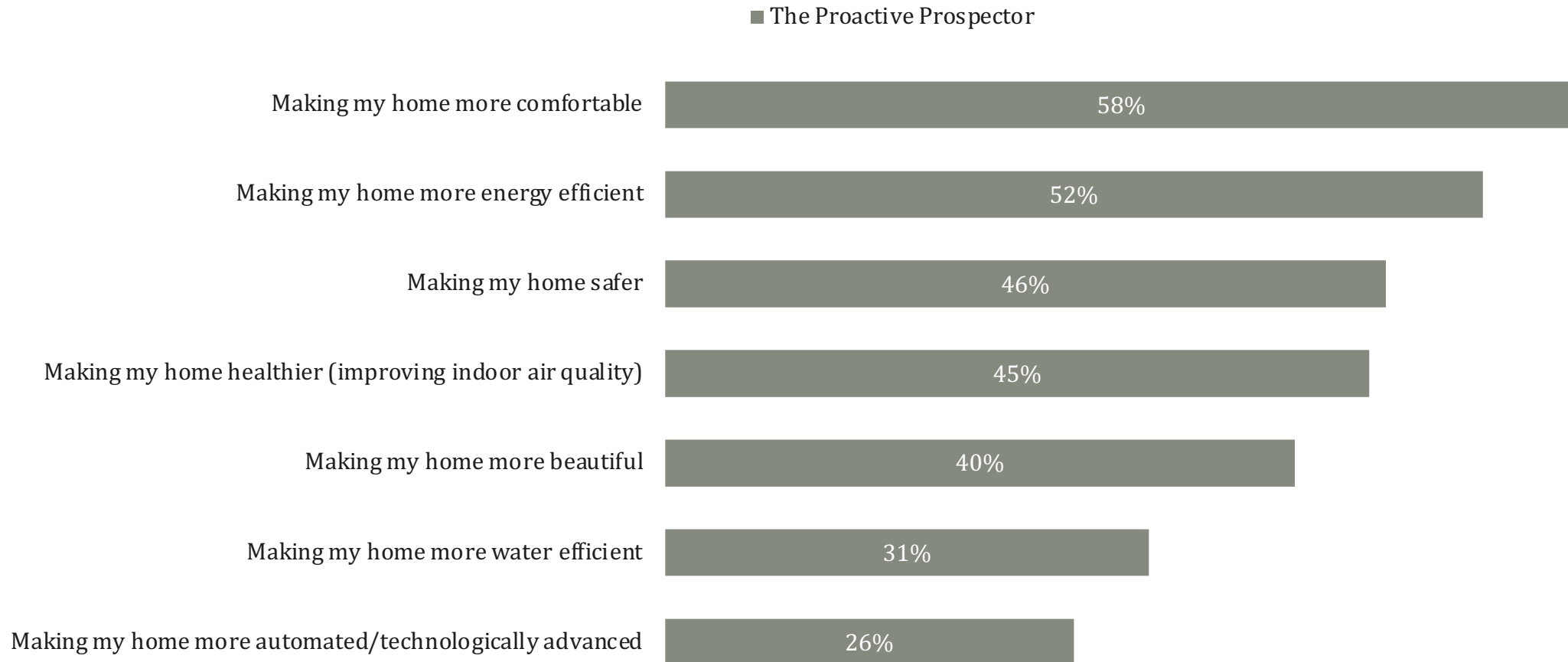
And they're far less confident than the other groups that their homes are already energy efficient.

■ The Proactive Prospector





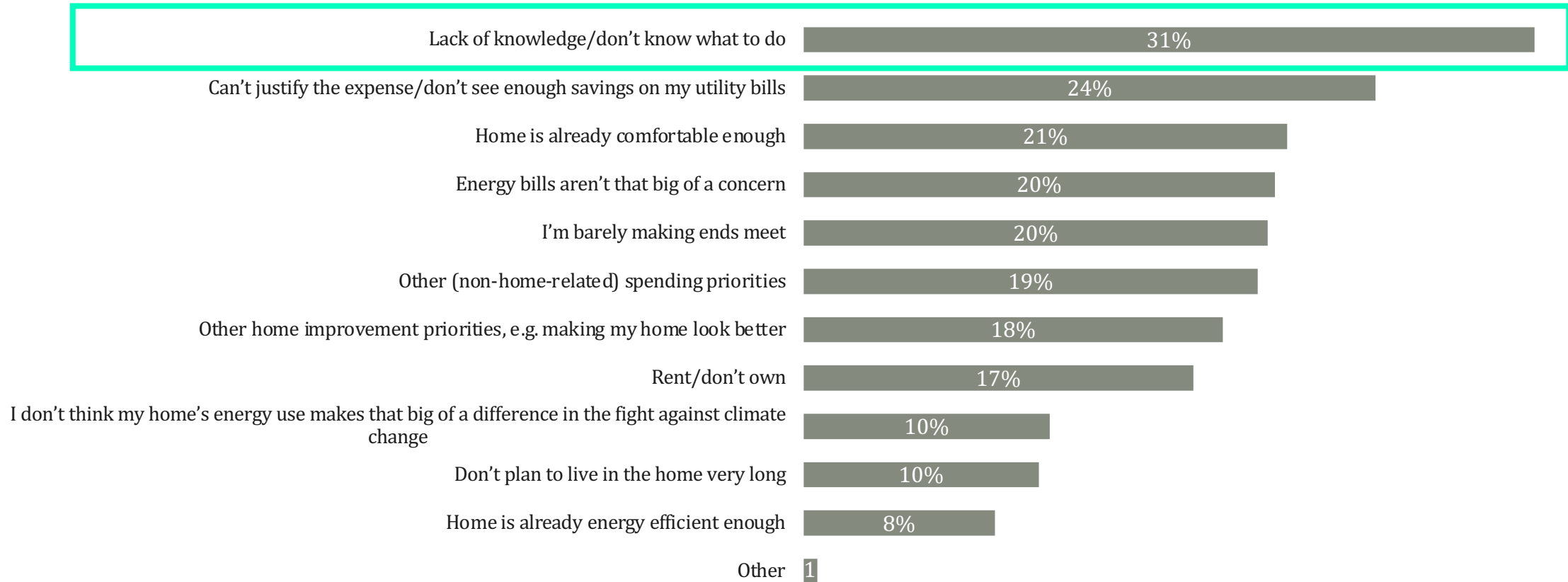
This is the only group that doesn't choose energy efficiency as their top priority; instead, it's a **more comfortable home**. This group also shows more interest than other groups in **IAQ** (as we already saw).





Lack of information is the biggest barrier to addressing energy efficiency. And the expense is a real challenge since many in this group have household incomes under \$50,000.

■ The Proactive Prospector

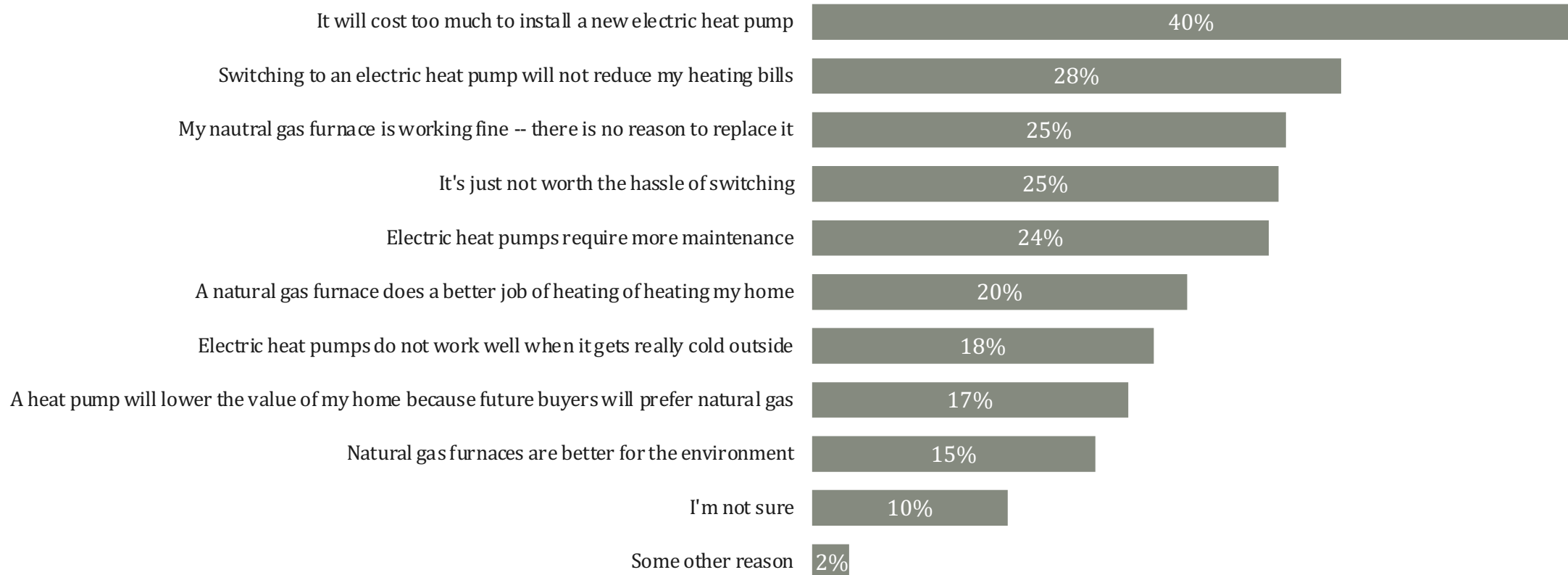


Source: Energy Pulse® 2023, Q28: What are the top reasons you haven't made more energy-efficient home improvements?
Tenureds n=231, Passive Candidates n=291, Proactive Prospects n=258



Rather than being super happy with their natural gas furnace, Proactive Prospectors are mainly hesitant to change because of cost concerns.

■ The Proactive Prospector

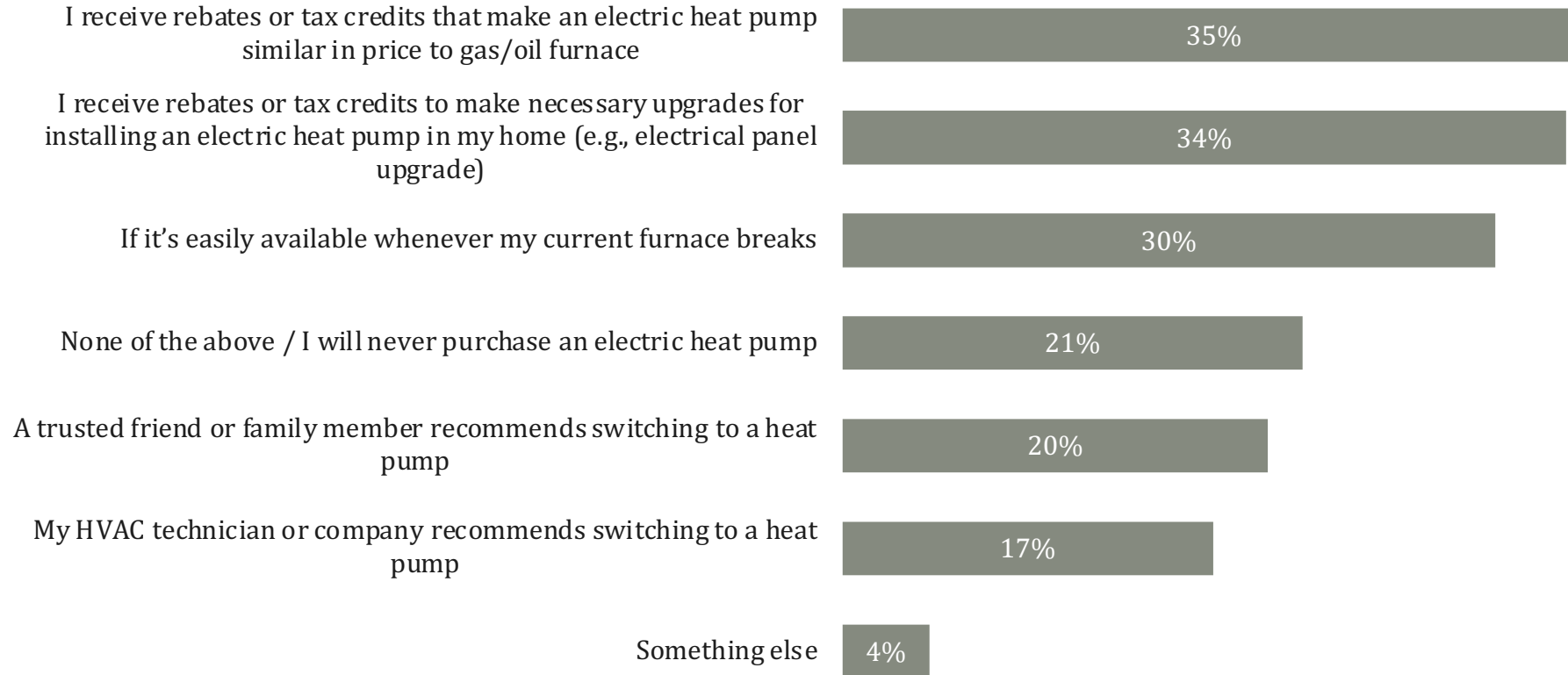


Source: Energy Pulse® 2023, Q18: Which of the following concerns do you have about switching from a natural gas furnace to an electric heat pump?
Tenureds n=82, Passive Candidates n=215, Proactive Prospects n=198

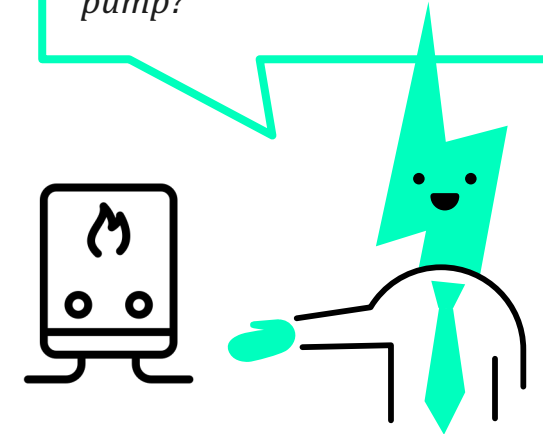


When it comes to their furnace, they're even more motivated to leave natural gas by rebates and tax credits than the other groups.

■ The Proactive Prospector



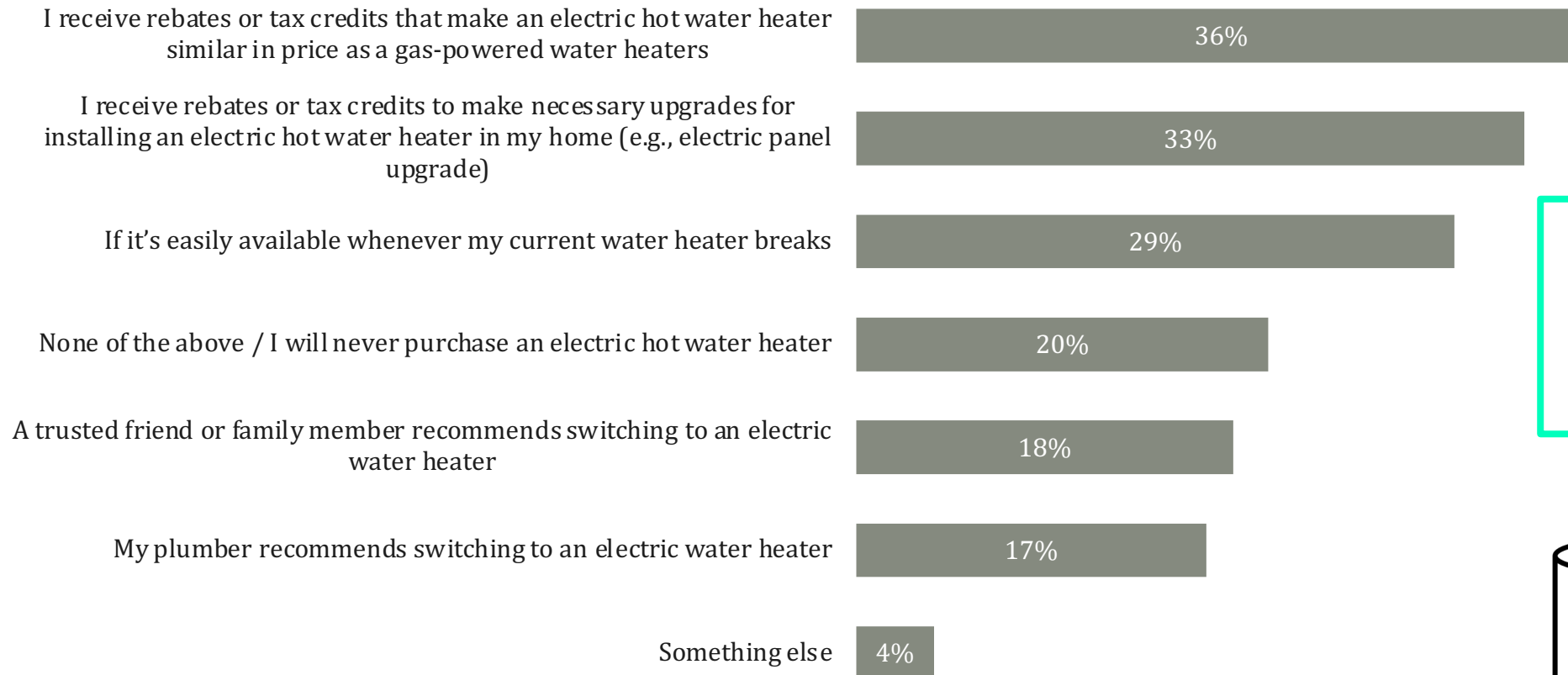
What would it take to replace your current gas-powered furnace with an electric heat pump?



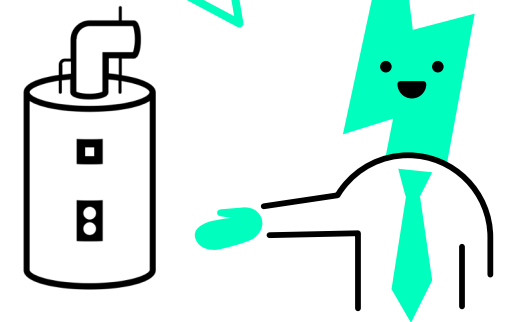


And the same is true for their water heater.

■ The Proactive Prospector



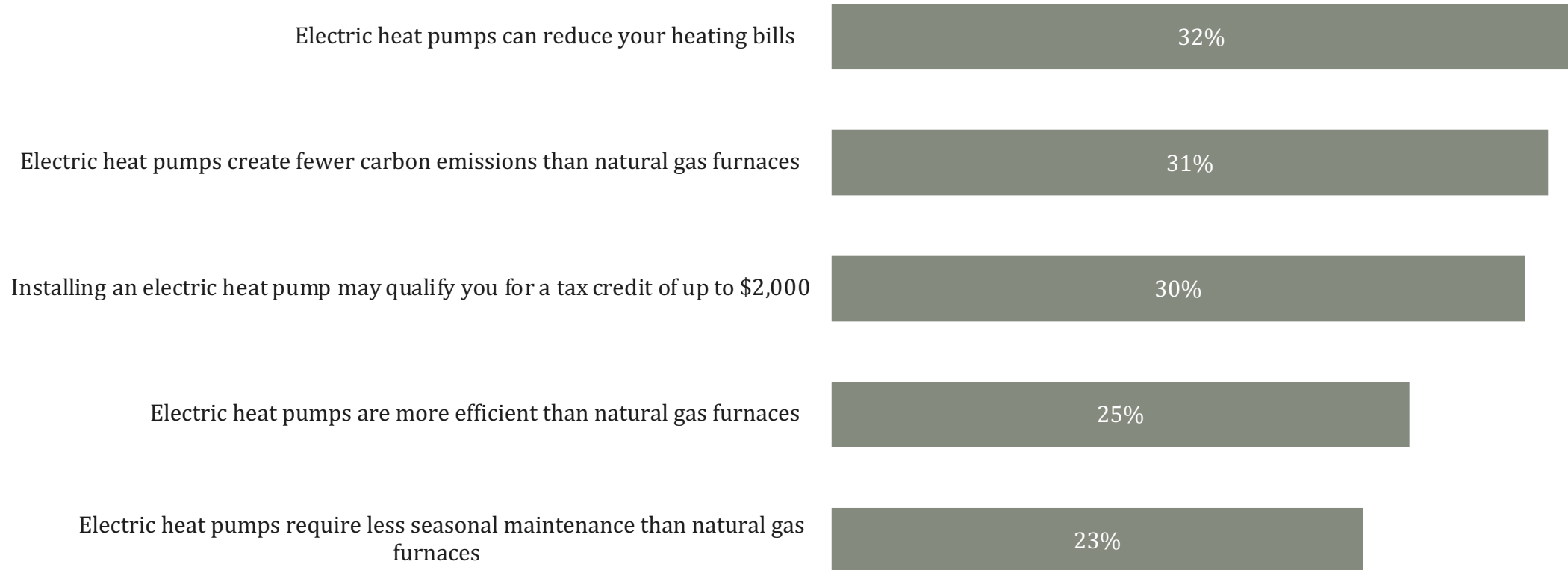
What would it take to replace your current gas-powered water heater with an electric hot water heater?





Reduced bills are a great benefit to joining Electrification, Inc., but almost as important is the potential to **create fewer carbon emissions with the new company, which is unique to this group.**

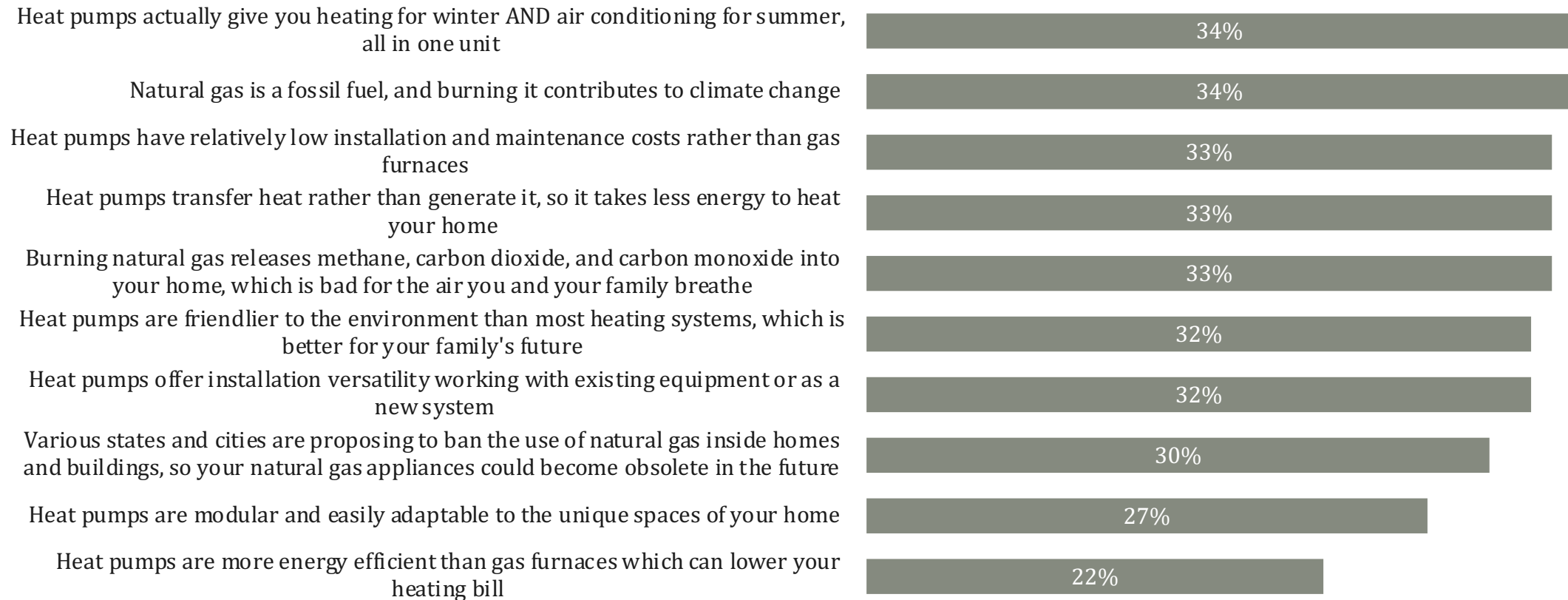
■ The Proactive Prospector





Messages around the ability to use electric in all seasons and climate change mitigation are equally as important to this group.

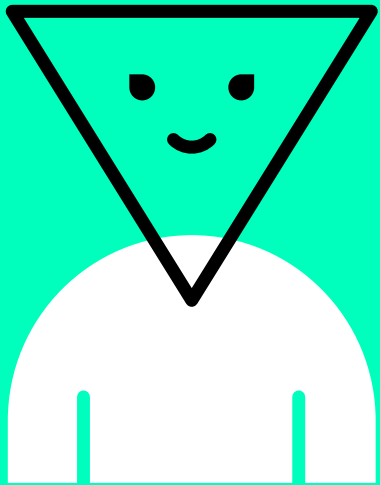
■ The Proactive Prospector



Source: Energy Pulse® 2023, Q19a. Below are several examples of potential advertising messages promoting the benefits of electric heat pumps over gas furnaces. How much does each ad message affect your interest in switching from a natural gas furnace to an electric heat pump? Tenureds n=231, Passive Candidates n=291, Proactive Prospects n=258

Recruit profile:

The Proactive Prospector



Money is definitely holding this group back. All-season comfort, cost savings and reducing carbon emissions are important to this group... but they show a notably stronger interest in benefits across the board than our other two profiles. That means that dependable and persuasive information around benefits such as air quality, energy efficiency, cost savings and even technological advancements could move this group to go electric. But they must be confident that the benefits package, including the financial returns, are worth it.

My motto: “I won't be with Natural Gas, Co. forever. I'm interested in something better but need to be confident that the benefits package is worth it, including financial incentives, before I make a move.”

Looking for: Year-round comfort, efficiency, burning fewer fossil fuels

Current concerns: Natural Gas, Co.'s IAQ and efficiency aren't what I want them to be, and I do worry about the environment.

I might consider Electrification, Inc. if: I can do a little better for the environment, especially with a big personal benefits package.

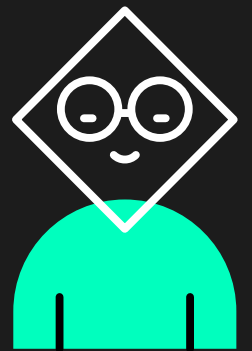
Barriers to Recruitment for Electrification, Inc.

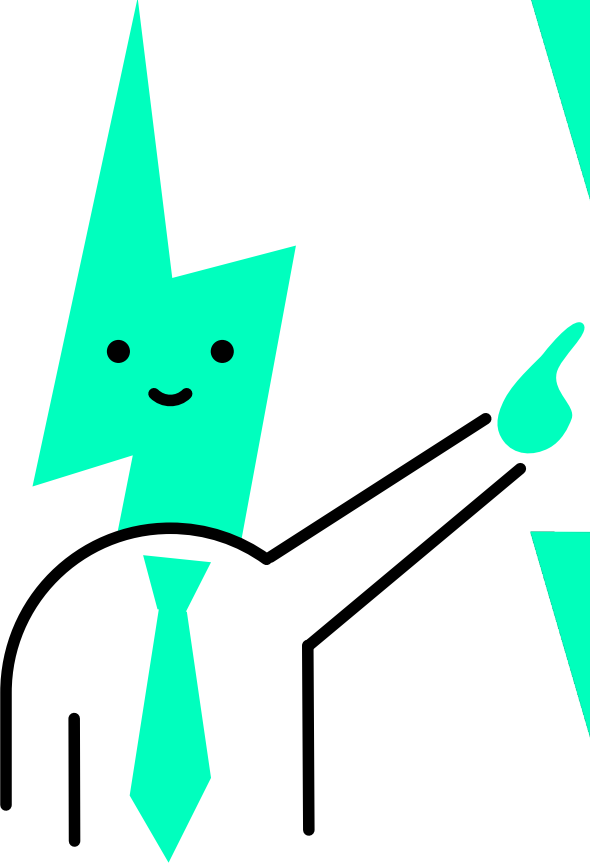


Tenureds say energy efficiency is their #1 priority...

They demonstrate it in how they respond to survey questions around messaging and yet, they aren't interested in switching to electric.

Why?





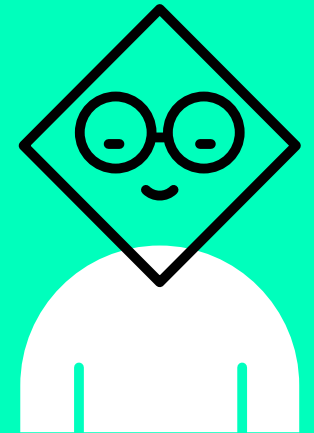
Because *they don't know that electric heat pumps are a more efficient option.*

93% rated a natural gas furnace as the most efficient heat source. And 75% already believe their home is energy efficient.

But in reality, electric heat pumps are **3x as efficient** as natural gas furnaces.

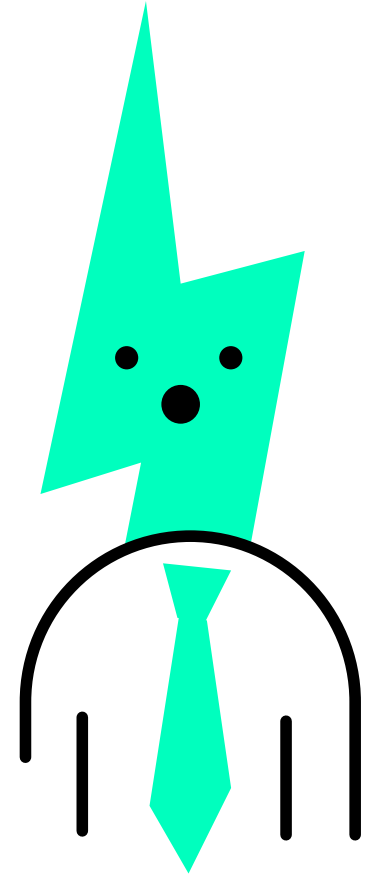
Let's consider why Tenureds are so loyal to Natural Gas, Co. despite available alternatives that meet their needs.

With 81% Boomers and Gen X, this averages as the oldest group. They've owned their homes the longest and have probably, at one point, 'upgraded' to natural gas as a more efficient heat source. They also have been through years of hearing about how great natural gas is.

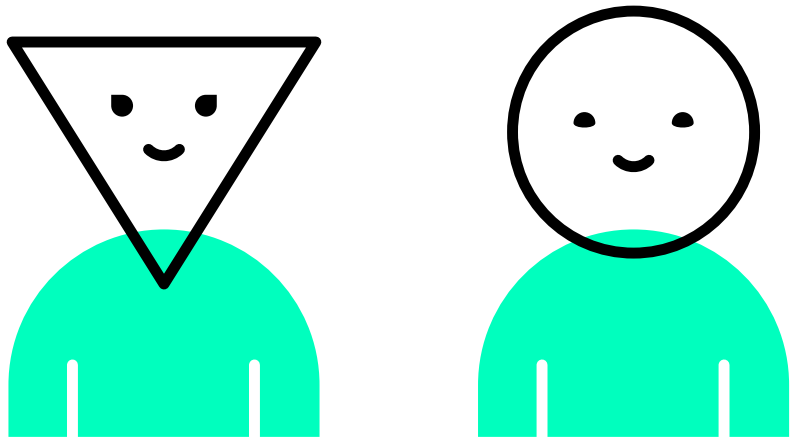


So, while we don't want to focus on our Tenured group because of this, they do show us one very important thing...

Electrification, Inc.
isn't messaging well.



And while the best potential recruits are **Passive Candidates** and **Proactive Prospectors**, these groups aren't a blank slate.



They've seen positive messages around natural gas, too.

Boomers and Gen Xers make up 60% of the Passive Candidates and 49% of Proactive Prospectors, so there is still a portion of these recruits that have been subjected to the same longstanding messaging for natural gas.

A money-saving decision that will make you

FEEL WARM.



Choose Georgia Natural Gas, **get a low rate** and get on with living your life.

Georgia Natural Gas
SAVINGS TO LIVE YOUR LIFE

gngsavings.com

NW Natural



Homebuyers Prefer Cooking With Natural Gas.

LEARN WHY PEOPLE LOVE GAS

NW Natural

Homebuyers Prefer Heating With Natural Gas.



A house just isn't a home without natural gas.

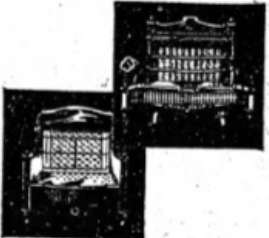
LEARN ABOUT HEATING WITH GAS

Quick Heat...Clean Heat Healthful Heat with Gas



*Warm as you wish|
.... without waiting*

This radiant Gas fireplace stops the icy wind at your doorstep. Touch a match, turn a lever and there's your heat... a clean, steady glow at any temperature you desire. The match is your kindling; no logs to be hauled in; no ashes to haul away. Come in and see our display of Auxiliary Gas Heaters—suitable for any fireplace and most mantels.

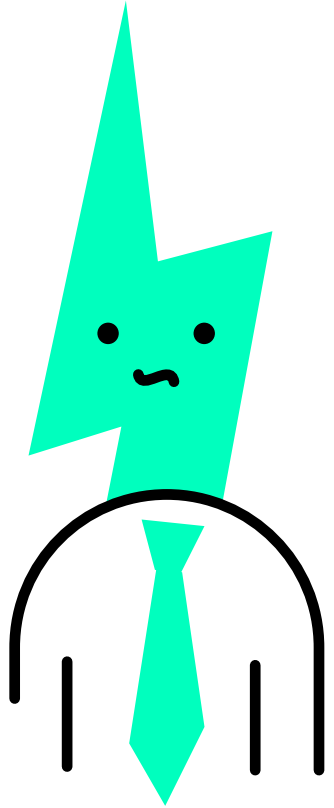


Greenville Natural Gas Co.

GREENVILLE, PA.

And it worked.

Remember, compared to heat pumps, natural gas wins on perceptions of warm and cozy, reliable and efficient — *even for those who don't use natural gas.*



If Electrification, Inc. was messaging as frequently over time in the same way, would it gain more recruits?

We think it's not just possible, but likely.

But we also think it's a little more nuanced than that.

The *type* of messaging matters.

Gas messaging has been heavily related to personal benefits: it's the warm, cozy, reliable energy source.

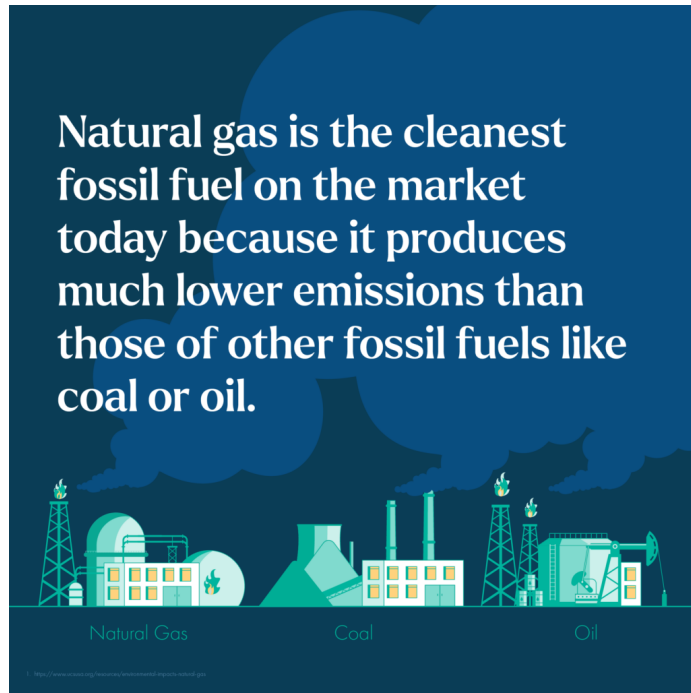
And people bought it. And keep buying it.



And now, more than ever,
money is being put behind
a different set of messages.

Advertisements portraying natural gas as a clean energy source obscures its environmental impacts.

“Since 2020, Natural Allies for a Clean Energy Future has spent \$10 million for ads that experts say mislead people about natural gas as a climate solution.” *Source: HEATED*



Source: BKV Energy



Source: HEATED

Oil and gas lobbying groups are among those who promote these “clean” natural gas advertisements.

Cleaner but not clean - Why scientists say natural gas won't avert climate disaster

By Valerie Volcovici, Kate Abnett and Matthew Green

August 18, 2020 7:34 AM EDT · Updated 4 years ago

Aa



“In January 2020, the American Petroleum Institute (API), a powerful lobbying group for the oil and gas industry, launched its ‘Energy for Progress’ advertising campaign. **The campaign has described natural gas as a ‘clean’ or ‘environmentally friendly’ energy source that has lowered CO₂ emissions in the United States.** But emissions from the natural gas industry, particularly in the United States, are now growing so rapidly that the sector ‘is quickly becoming one of the biggest, if not the biggest, challenges to address climate change.’”

Source: Reuters

This marketing misleads consumers into believing they're investing in green energy.

“Public polling shows that the phrase **natural gas gives people the false impression** that it's safe for humans and the environment. Natural gas may be a triumph of marketing, but the fact is that gas is a major contributor to air pollution, water pollution, and climate change.”

Source: NRDC

Different names for “natural gas” influence public perception of it

By Karine Lacroix, Matthew Goldberg, Abel Gustafson, Seth Rosenthal and Anthony Leiserowitz

Filed under: Beliefs & Attitudes

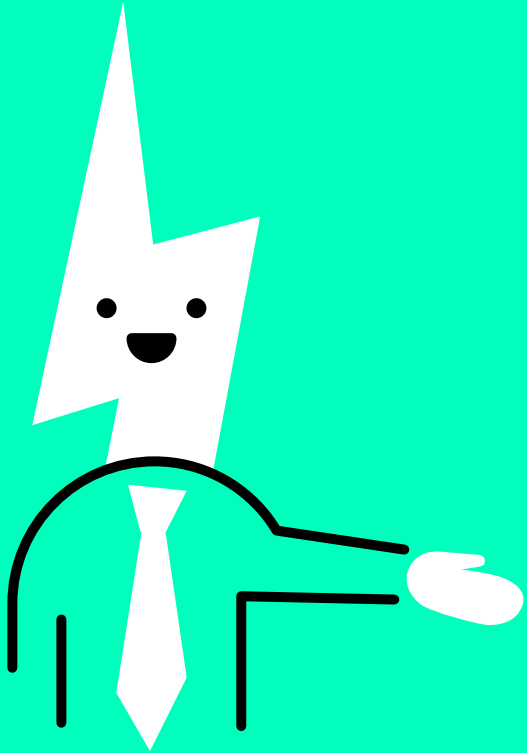


Natural gas has already established itself as the cozy, warm, efficient option. And now, with messages around being 'cleaner,' people feel even better about it.

But based on our segments, we know sustainability isn't the most persuasive consideration for electric.

Instead, we have to establish
Electrification, Inc. as having
the **best benefits package.**

We have to show it's **BETTER.**



Showing Electrification, Inc. has something BETTER is interesting.

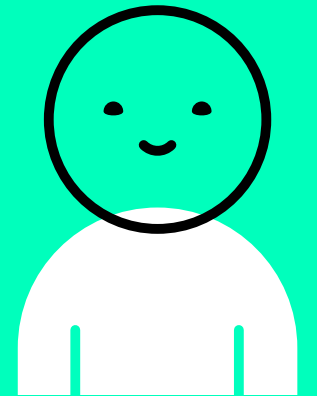
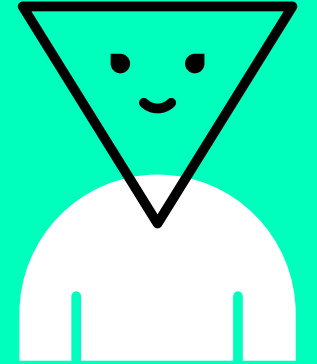
Showing it is better in *multiple ways* is motivating. And showing it's better because of *personal benefits*? Now we're really onto something.

So that becomes our recruitment strategy: *We have to show that electric products are BETTER and will personally benefit users.*

Let's dig into how we might talk to each of our segments about varying products in a compelling way.

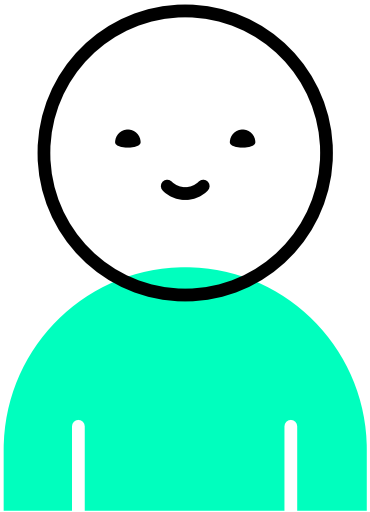
The Right Messaging for the Right Recruits

Let's focus on **Passive Candidates** and **Proactive Prospectors**, as our Tenureds are happy with Natural Gas, Co.



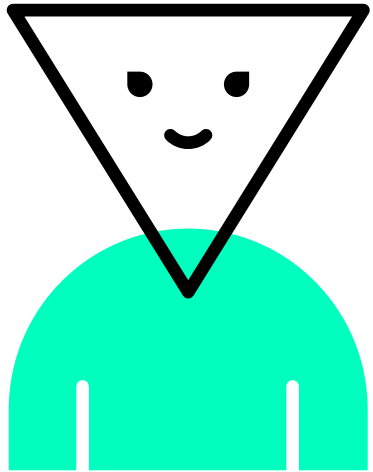
Passive Candidates

Money, Money, Money. Easy, Easy, Easy.



Our Passive Candidates are willing to consider a move to Electrification, Inc. if it will save them money and it's an easy choice when the time comes to make a switch (their furnace or water heater goes out or their stove stops working).

But they're also willing to listen if other benefits are brought up, notably if they involve year-round comfort, easy maintenance and better indoor air quality. They are willing to spend money if it makes their home more energy efficient, comfortable and safe.



Proactive Prospectors

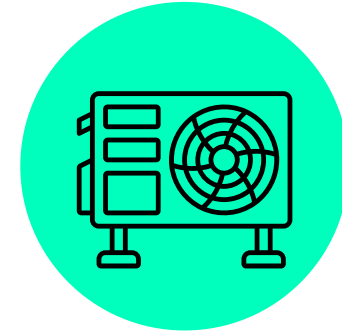
Our Proactive Prospectors exhibit a greater concern for the environment than other segments. They are interested in energy efficiency, but they are not confident in their knowledge level to make the right choices.

However, a range of benefits are of interest to them. They care about year-round comfort, climate change impact, easy maintenance and installation, and better indoor air quality. This group needs to feel better informed to make any big changes.

Messaging examples by product

Heat Pumps

Looking at the offerings of heat pumps and what our potential recruits care about, we can identify messaging around energy efficiency, money, safety and 2-for-1 air control systems. A combination of these messages would be enticing to Passive Candidates and Proactive Prospectors and could even catch the eye of our Tenureds.



Heat pumps have a variety of benefits that speak to our Recruits:

- Energy efficiency
- 2-for-1 with heat and AC in a single unit
- Cost savings
- Safety
- IAQ



Heat Pumps

Everyone cares about energy efficiency and money.

Energy efficiency: Heat pumps are 3x more energy efficient than gas-fired furnaces.

Heat pumps transfer heat instead of having to generate it, which make them much more efficient than natural gas for heating. Our Passive Candidates claim they will spend money on making their homes more energy efficient. Coupled with a 2-for-1 message (that's pretty efficient!), comparing efficiency to gas-fired furnaces could be a winning combination.

Money: Heat pumps can save you money now and long term.

Heat pumps are efficient, have low operating and maintenance costs, are eligible for rebates and incentives and increase your property value.

Additionally, heat pumps provide long-term savings as they provide both heating and cooling needs, meaning one system to maintain. The ease, financial benefits and efficiency can make compelling messaging for our interested recruits.



Heat Pumps

Comfort and safety appeal to all segments, too, and heat pumps can easily meet these needs for our recruits.

Comfort: Heat pumps cool your home in summer and heat it in winter for year-round comfort.

While our natural gas users view natural gas as the coziest and warmest of heating sources, this ignores other seasonal home comfort solutions. And as we face more frequent record-breaking temperatures, home cooling solutions (especially ones coupled with heating solutions!) will become more valuable, especially in regions that are just starting to desire air conditioning during the summer.

Safety: Heating your home should be safe for your family. Choose heat pumps!

Heat pumps do not combust flammable gas for heat. Instead, they transfer heat safely and efficiently. They are incredibly safe options for heating (and cooling) your home, due to the absence of combustion, reduced emission risks, lower fire hazards and simpler maintenance.



Heat Pumps

Indoor air quality is important to all our segments, too, and messaging around value, such as a 2-for-1 unique to heat pumps, and may create an 'aha' moment for our recruits.

***Indoor Air Quality:* Heat and cool your home worry-free with clean heat pumps!**

Heat pumps transfer heat safely and efficiently without burning fossil fuels in your home. They provide better indoor air quality without emissions.

Touching on the respiratory dangers of the alternative could get our recruits to see their heat source differently.

***Value:* 2 for 1? Talk about efficient! One unit to keep your home comfortable all year round.**

One unit to do it all! This means less maintenance and associated costs, and an energy efficient unit for total indoor environment comfort.

This is a different take on efficiency, but still compelling for all our natural gas users.



Heat Pumps

Proactive Prospectors care about climate change and fossil fuel use reduction, so these can be helpful secondary messages to personal benefits.

***Climate Change:* Why burn fossil fuels to heat your home?**

Proactive Prospectors are interested in reducing their carbon footprint and messaging around reducing fossil fuel use piqued their interest.

While this messaging isn't top priority for all our groups, it's worth a mention as a secondary benefit.

Stovetops and Ovens

While people love natural gas stove tops to cook with (likely because chefs use them) there may be benefits to electric that have been overlooked, especially for families and home cooks with busy lives.



- Energy efficiency
- Cleanliness
- Comfort
- Safety
- IAQ



Stove Tops and Ovens

With safety being high on our Passive Candidate's list of concerns, we have some strong messaging that can get our recruits to consider joining Electrification, Inc.

***Safety:* Why put your family at risk of a fire? Cook with electric!**

If folks are concerned with safety, this is a great way to put electric options in front of them. Natural gas stoves have a flame burning 24/7/365. With children in the house (which over 1/3 of our recruits have) an open flame is an extremely dangerous prospect.

***Safety:* Keep dinner healthy with electric stoves and ovens.**

Studies show that emissions from stoves may be harmful to human health and a cause for childhood asthma. The carcinogenic emissions can be as bad as secondhand smoke.

This is a very compelling reason for those that care about safety to make the switch.



Stove Tops and Ovens

Comparing the benefits of electric cooking appliances to key care-about, and messaging around comfort and safety can move our recruits to go electric.

***Comfort:* Keep your kitchen clean and comfortable with easy to clean stove tops.**

Many electric stove tops are flat tops and their cleanability should spark some interest for users. What we see with both recruits is that a range of messages and considerations can reach them. Practical benefits like this might trigger some interest, especially when you can relate it back to the comfort of a home through cleanliness.

***Comfort:* "Keep warm" settings make sure everything (and everyone) is ready together.**

Nothing is more comforting than a hot, home-cooked meal. And nothing is more frustrating than having that meal go cold or overcook because we can't get the timing right with a busy household. Electric stoves and ovens have lower heat options to keep our lovingly prepared meals ready for the perfect time to serve.

Over 50% of our recruits care about comfort, and a third have kids, making this a message that will resonate.



Stove Tops and Ovens

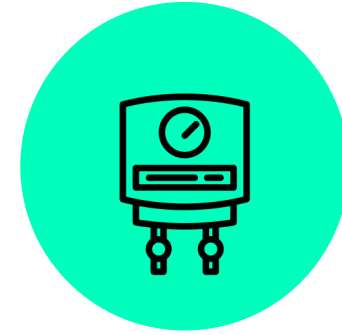
Climate change and fossil fuels are important to our Proactive Prospectors, too.

***Climate Change:* Fossil fuels don't belong in your kitchen.**

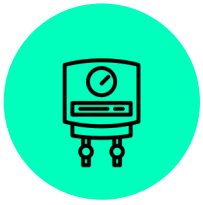
Proactive Prospectors are concerned about fossil fuels and carbon emissions. Link this to cooking and health, and it could create motivation to move away from natural gas in the kitchen.

Water Heaters

Similarly, water heaters lack the open flame that can cause concern for safety-minded consumers. They also have benefits around home comfort and costs that are worth considering.



- Comfort
- Costs
- Safety
- IAQ



Water Heaters

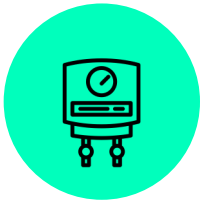
Comparing the benefits of water heaters to key careabouts, messaging around comfort and safety can move our recruits to go electric.

***Safety:* Fire and water don't mix. Go electric!**

It is remarkable that we've invited ongoing, unmonitored open flames into our homes so nonchalantly. For our safety-conscious Passive Candidates, let's remind them that using electric means removing open flames from your home.

***IAQ:* Electric water heaters eliminate exposure to potential emissions.**

Along the same lines as our stove, it is worth considering electric solutions to carcinogenic emissions.



Water Heaters

Comparing the benefits of water heaters to key careabouts, messaging around comfort and safety can move our recruits to go electric.

***Comfort:* Reclaim your space! Electric water heaters free up space and reduce unsightly equipment.**

Electric water heaters can free up space in your home. They're compact and have less space restrictions than open flame systems that require venting.

***Money:* Electric water heaters save you money!**

With lower initial purchase cost and installation fees, electric water heaters shouldn't be hard to sell. On top of that, there are often rebates and incentives to selecting electric over gas.

With what we now know about our recruitable segments and their key concerns, how can we grow Electrification, Inc.?



It's a multi-faceted approach

The data shows us that people are unlikely to switch from gas to electric until their appliances stop working.

But we need to get ahead of that moment and create a strong foundation of preference for electric for when they are facing a buying decision.

To do that, we need to make sure potential recruits are:

1. **Aware** of the benefits of electric options (beyond sustainability) before they have to buy
2. **Enticed** by those benefits enough to desire electric, which means using the right messaging
3. **Reminded** of those benefits again (by an expert) when they have to purchase a new appliance

1. Exposure to messaging

Remember that \$10 million spent on natural gas messaging?

Electrification, Inc. has to do the same, supported by utilities, appliances, distributors, NGOs and beyond.

It has to get in front of the right people.

A lot of the right people.
And frequently.

2. Exposure to *the right* messaging

But it has to be messaging
around the personal benefits.

Comfort, safety, health, money.

These are the sweet spots for
catching the eye of recruits.

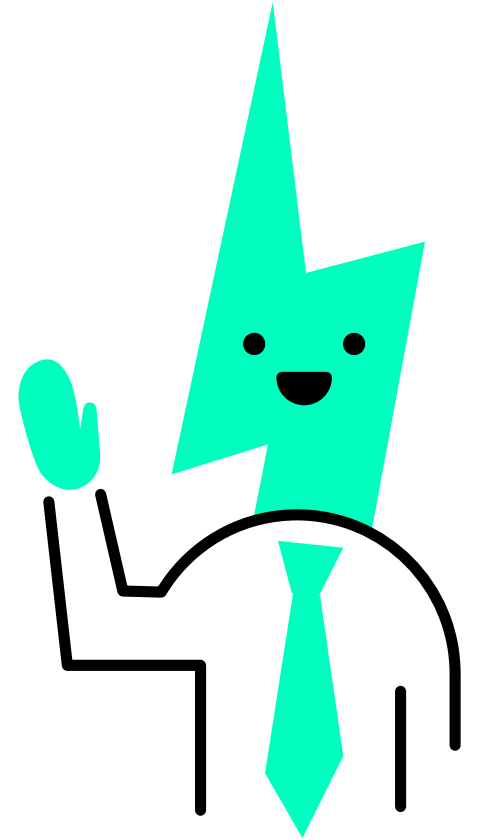
3. At the time of purchase: the use of Ambassadors

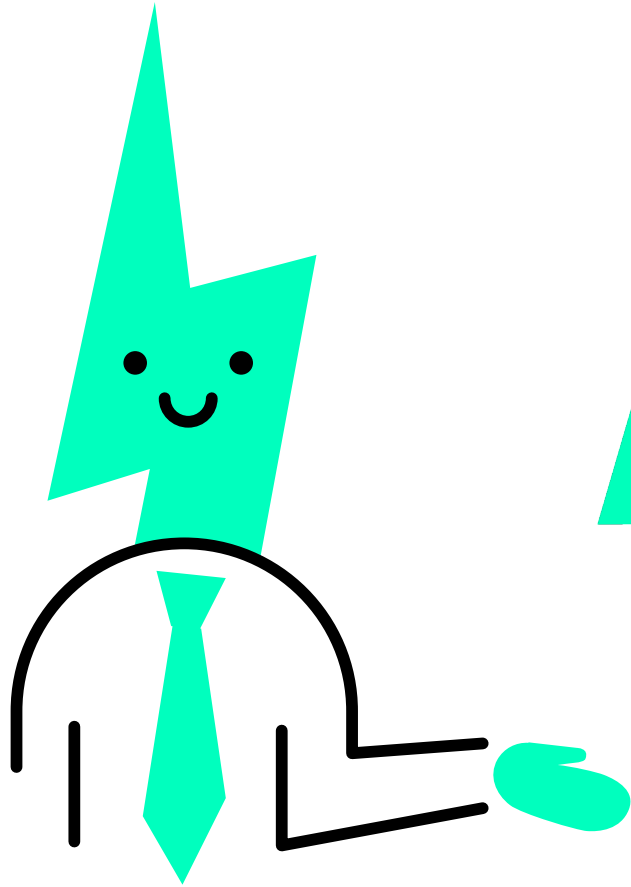
And then, when it comes time to make a choice, they have to be exposed again to benefits that electric can provide.

Team Electrification, Inc.
must become ambassadors!

This means we have to equip our Ambassadors (distributors, employees, installers, sales teams) with the right information on the benefits that will get recruits interested in joining Electrification, Inc.

And Ambassadors have to evangelize it at the time that our recruits are making a decision.





Let's recap:

- We recommend focusing recruitment efforts on two groups: Passive Candidates and Proactive Prospectors.
- Money, 2-for-1 value, energy efficiency, comfort and indoor air quality matter to these groups, and electric products can meet those needs.
- Messaging should be geared towards these personal benefits, and sustainability messages should be secondary.
- We need to message heavily and frequently to make recruits aware of these benefits *before they have to buy*.
- Recruits are most likely to make the switch at the time of need, for instance when an appliance stops working.
- Ambassadors should be well-trained to reiterate personal benefits of electric options *at the time of sale* in order to recruit successfully.

Thank you

ERM Shelton is the nation's leading marketing communications firm exclusively dedicated to the sustainability sector. We create a market advantage for organizations that are creating a sustainable future.

We gather rich market insights that help you make the right environmental and social purpose commitments, develop more environmentally friendly products, evolve what your brand stands for and fuel the right stories and market engagement campaigns – all so people will want to buy from, work for and invest in your organization.

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