

### Marketing and Outreach Plan (no more than 3 pages)

Outline a marketing plan that describes methods to create community awareness around the HeatSmart Mass program and includes the following:

- Vision statement: describe ways in which a joint marketing strategy between the municipality, the volunteer team, and the selected Installer could increase the number of sign-ups for a clean heating and cooling site assessment and expanded adoption within the community.
- Strengths, weaknesses, opportunities, threats: provide an analysis of different factors within your community that create unique strengths, weaknesses that must be addressed, opportunities to take advantage of, and threats to plan around.
- Marketing strategy (specific methods for promotion, advertising, public relations, etc.)
  - Include a description of what types of marketing and outreach channels will be employed, particularly leveraging existing social media or plans for creating new social media platforms.
  - Include information on where community events could be held, including the Meet the Installer community meeting.
  - Consider including specific strategies as part of the marketing and outreach plan focused on driving adoption in:
    - low- and moderate-income households, or
    - other underrepresented housing sectors, such as rental housing.
  - If the Community chooses to include more than one clean heating and cooling technology in the HeatSmart Mass campaign, discuss how the volunteer team will promote multiple technologies.
  - Goals for installations per technology.
- Implementation timeline: month-by-month outreach activities

For examples of past marketing proposals, visit the [HeatSmart Mass Pilot website](#).

#### Vision statement:

Building upon the successes of Belmont's residential solar and electric vehicle programs and with strong support from its own municipal light plant, the HeatSmart Belmont program will use a grassroots approach to connect residents of Belmont to information and opportunities to adopt clean heating and cooling solutions for their homes, with an overall goal of 50 new ASHP installations in town.

#### Strengths, weaknesses, opportunities, threats:

Based on our knowledge gained in past campaigns we have identified the following for a potential ASHP campaign:

#### Strengths

- History of energy-related campaign successes
- Engaged, active volunteer base and governing bodies

- Locally-controlled electric utility with the ability to respond directly to community interests and concerns
- Well-established climate action plan, with clear goals and growing attention around electrification as a climate solution

#### Weaknesses

- Historically less engagement with lower- and moderate-income households and renters in terms of energy programming.
  - Solution: Our Marketing Plan will include more focused, customized outreach for these customers, highlighting the availability of tailored incentives.
- Lack of familiarity among residents in general with heat pump technology as compared to other heating and cooling options. This has been confirmed by previous outreach efforts around Belmont Light's existing heat pump program.
  - Solution: Provide easily comprehensible information and emphasize grassroots, neighbor-to-neighbor interactions to demystify the ASHP purchasing and installation process.

#### Opportunities

Data from previous campaigns and experience clearly identifies a variety of opportunities that our marketing plan will make actionable. For instance:

- A 2017 Belmont Light customer survey of 400 respondents found that 24% of customers surveyed had not had a home energy assessment performed at their homes but planned to do so in the future. An additional 23% of customers were not aware that they were eligible for the home energy assessment program at all. That same survey found that the biggest drivers for conserving energy for Belmont residents are: environmental concerns (31%); financial and cost incentives (25%); and fuel cost increases (11%). The marketing for HeatSmart Belmont would center around this knowledge by addressing each of these categories.
- During the *Belmont Drives Electric* campaign, a Sagewell analysis and participant poll revealed that homes with heat pumps are 10 times more likely to have purchased an EV and homes with solar are 25 times more likely to have purchased an EV. We conclude that there is a strong correlation between adoption of these technologies. This is a great marketing opportunity, as we have a high-quality list of leads to send targeted marketing.
- According to a Sagewell analysis, there are approximately 2,000 oil-heated homes in Belmont, whom we have determined are key candidates for Belmont Light's heat pump incentive program. Thus far, 99 of these households have installed heat pumps, leaving around 1,900 candidates to target during the HeatSmart Belmont campaign.
- The Belmont Energy Committee's new Roadmap for climate action based on strategic electrification and renewable energy supply offers an ideal context for a 2019 home heating campaign. The committee will be presenting resolutions for these topics to upcoming Town Meetings. These resolutions will set the stage for:
  - Endorsing electrification as a key strategy for achieving emissions reduction.
  - Transitioning Belmont's electricity supply to 100% carbon-free sources, so that home heating/cooling with heat pumps will be zero-carbon.
  - Implementing low-carbon building codes that promote the incorporation of heat pump technologies in buildings under construction or renovation.

#### Threats

- Campaign fatigue amongst residents and volunteers may be a factor of concern. With three consecutive campaigns over the past three years, some campaign volunteers could simply be burned out, while recipients of our past marketing efforts may be oversaturated.
  - Solution: Because Belmont has its own electric utility, staff is available to ease the burden on volunteers throughout the duration of the campaign. HeatSmart Belmont will also adapt its marketing strategies if we encounter a lack of interest amongst prospective leads. With the right approach, we will be able to sustain momentum from past campaigns rather than allow for fatigue.
- Market prices for heat pump systems and installations still discourage some potential customers from choosing heat pumps over gas or other fossil fuel systems.

- Solution: Belmont Light has already enhanced its heat pump incentives with higher rebates, incentive adders for fossil fuel displacement, and more attention to lower income customers in order to address these concerns.

**Marketing strategy:**

Based on an online and live survey of 76 Belmont residents, we understand that educating potential customers will be the largest task to undertake (32% of those surveyed said they were unsure whether they were candidates for a heat pump system). To accomplish this, HeatSmart Belmont will utilize a comprehensive marketing strategy, including use of the following channels:

- HeatSmart Belmont website
- Space on Belmont Light and Town of Belmont website
- Social media (campaign Facebook and Twitter page); connect with outside social media accounts, including Sustainable Belmont, Belmont Light, Town of Belmont, and others to amplify HeatSmart Belmont events and messaging.
- Belmont Light communication channels: customer portal; bill message; quarterly newsletter; public meeting announcements; annual historic calendar; customer emails; customer service messaging; and on-premises advertising
- Postings to various Belmont community listserv mailing lists
- Communications via the Belmont Public Schools, PTOs, and other town offices
- Communications to targeted groups (e.g. electric vehicle owners and solar hosts) through existing email distribution lists
- Announcements, letters and articles in local media (Belmont Citizen-Herald newspaper, the Belmontian (online) and broadcasts via Belmont Media Center)
- Sandwich boards on major thoroughfares (Concord and Trapelo Avenues) to advertise Meet-the-Installer events
- 30-foot banner in highly visible location in Belmont Center.
- Phone banking to follow up with targeted leads
- Visibility via tabling presence and flyering at town events and heavily trafficked locales: Belmont Light Winter Solstice celebration – late December, 2018; Martin Luther King Day Breakfast – January 21, 2019; Belmont Town Day – late May, 2019; and other events as we identify them.

*Community Events:* We will hold monthly community events during which we will educate the public about heat pump technology, introduce the chosen installer, and let potential customers talk with current customers in a low-pressure environment. The ideal location for a HeatSmart Belmont event is the Beech Street Senior Center, which features multiple meeting spaces designed for large crowds and is also a common gathering place for senior citizens and other lower and fixed income residents. Based on prior experience, we know that the Chenery Middle School is also an excellent location for a community gathering such as a Meet the Installer event. With a large community room, central location and ample parking spaces, CMS can accommodate a large audience.

*Open houses:* Also based on experience from the *Belmont Drives Electric* campaign, we know that the experiential act of taking a test drive is one of, if not the biggest drivers in the decision-making process of purchasing or leasing an EV. With this in mind, we will hold open houses with current heat pump owners to give potential customers a firsthand look at how the system works and the opportunity to ask any questions they might have. Face-to-face interactions with actual users can help reduce anxiety about an unfamiliar technology.

*Lower-income households:* We will reach out to lower-income households by delivering messaging about the program to Belmont Light ratepayers on Residential Rate LI for customers who demonstrate participation in an eligible income assistance program. We will further attempt to connect with low-income individuals through the Belmont Council on Aging. We will also pursue partnerships with local financial institutions to attempt to secure offers of no- or low-interest loans for ASHPs, to make the up-front costs less of a disincentive to lower-income households. In addition, Belmont Light's 2019 ASHP program contains specific incentives for lower income customers.

*Renters and Landlords:* As approximately 50% of Belmont Light's residential customer base is multi-family, it is important for us to provide tailored messaging to this group. To accomplish this, we will demonstrate to landlords how making energy improvements is mutually beneficial for them and their tenants. We will specifically lay out how ASHPs save on maintenance and fuel costs over time and how in a town like Belmont, energy efficiency can give their property a cutting edge in the market.

