

# The Attention Shift

What the Market Is Actually Hearing  
About Electrification Right Now



# The tech works. The financing exists. Why is adoption stalling?

## SECTOR INPUTS

Heat pumps perform. Induction is superior.  
All-electric models pencil out.

Case studies are real.

Policy frameworks are unlocking.



**Is there a gap between  
what we broadcast and  
what the market receives?**

## MARKET ADOPTION

Remains  
significantly  
below target.

5 Years. 7 Million Impressions.  
One Database.



First-person behavioral intelligence, not third-party surveys.

Mapped ~600,000 individual reactions by segment and title.

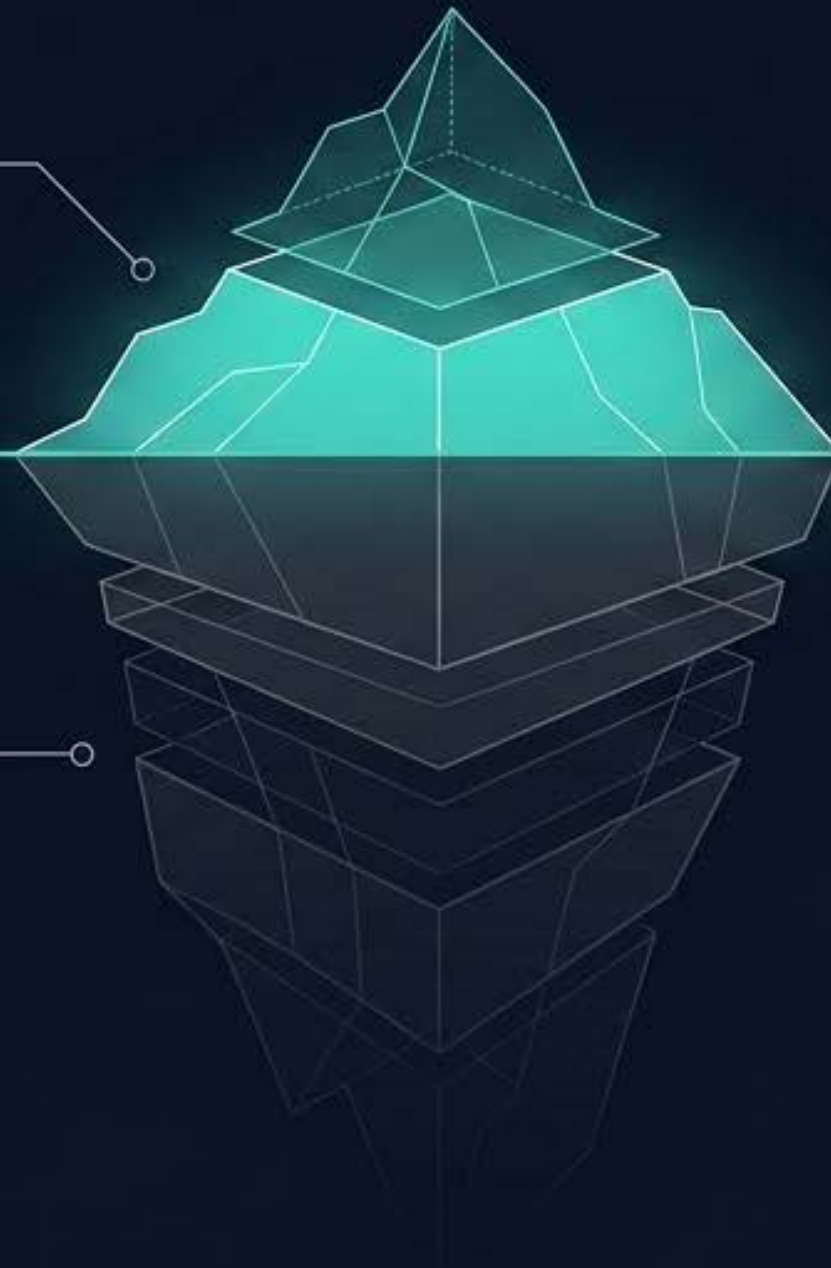
Tracked 30,000+ energy contacts with semantic engagement profiles.

# By the time they call you, their mind is 80% made up.

**The 20% we see:**  
Active pipeline and  
visible conversations.

**The 80% we don't:**  
The Dark Funnel.

Views shaped silently by  
search queries, council  
meetings, and neighbors.



For every 1 public  
engagement, 4-5  
buyers process silently  
in the dark funnel.

**The insight:**

We optimize for the  
20% we see.

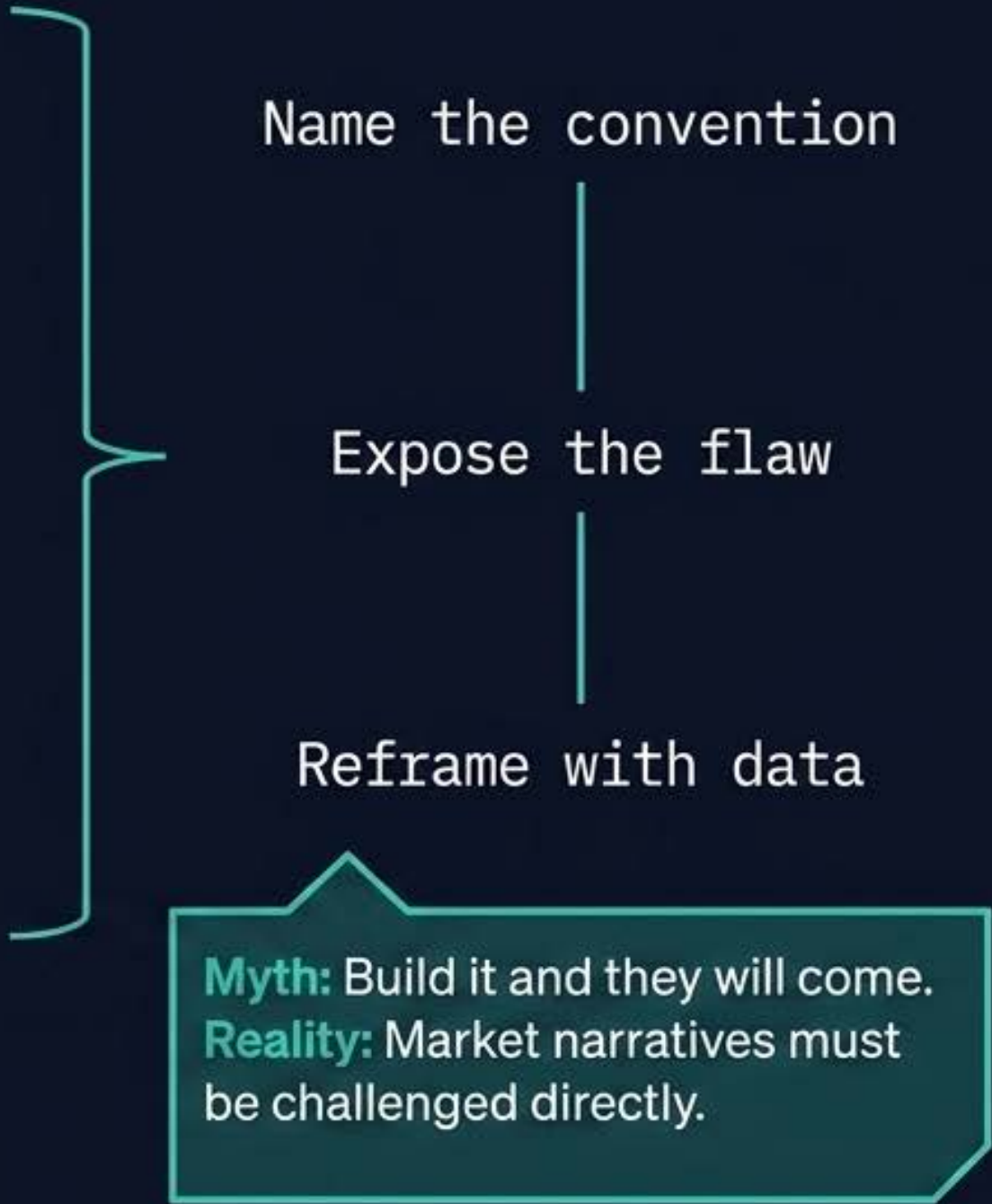
We lose the 80%  
we don't.

## Building electrification reaches the lowest rate of actual buyers.

| Sector       | Posts | Total Engagements | High-ICP Rate | Avg ICP Score |
|--------------|-------|-------------------|---------------|---------------|
| VPP          | 36    | 65                | 23.1%         | 65.8          |
| Microgrids   | 124   | 198               | 17.7%         | 56.0          |
| EV/Transport | 147   | 324               | 13.6%         | 53.7          |
| Solar PV     | 390   | 1,617             | 12.7%         | 53.2          |
| BESS         | 270   | 801               | 12.9%         | 53.3          |
| HVAC/Bldg    | 144   | 378               | 8.2%          | 48.8          |
| Policy/Reg   | 403   | 1,679             | 7.2%          | 48.6          |

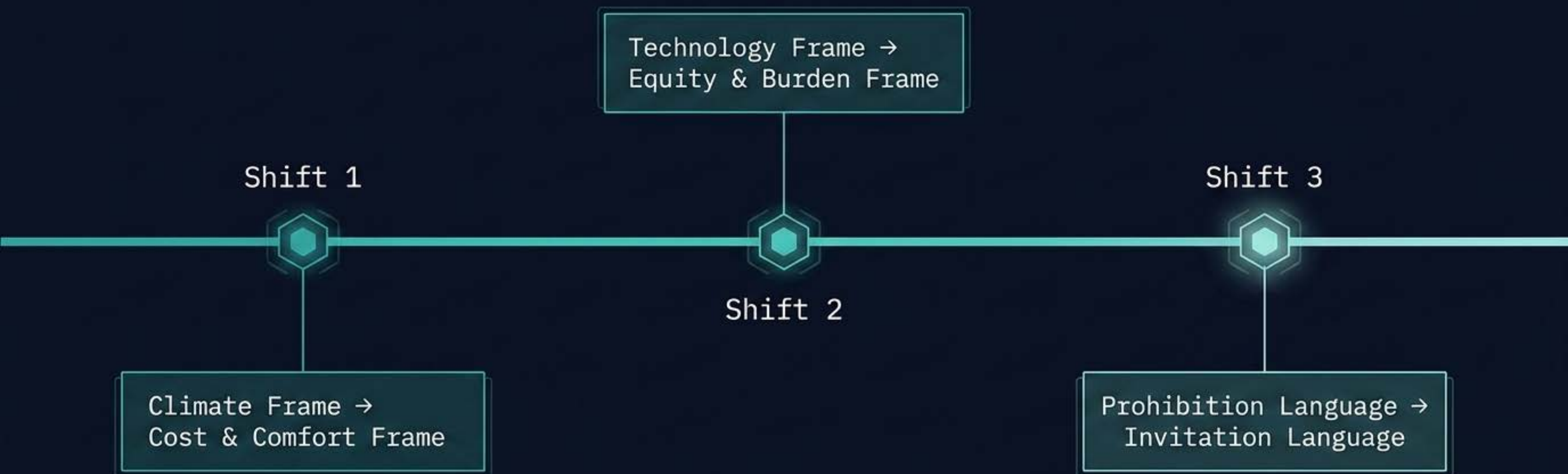
# High-performing content challenges existing market narratives.

| Post Hook                                            | Reactions | Comments |
|------------------------------------------------------|-----------|----------|
| Nobody mentions the 15-year supply chain gap...      | 1,380     | 178      |
| We're still pretending batteries are the only answer | 1,162     | 66       |
| Stop calling it 'firm vs. intermittent' power...     | 538       | 195      |



# The market's language has shifted three times in five years.

Organizations that didn't track these shifts are now speaking a dead language.



# Climate motivation is real. It's just not how buyers decide.

## 2020 Era

"Do the right thing for  
the climate."

Result: Captured early adopters.

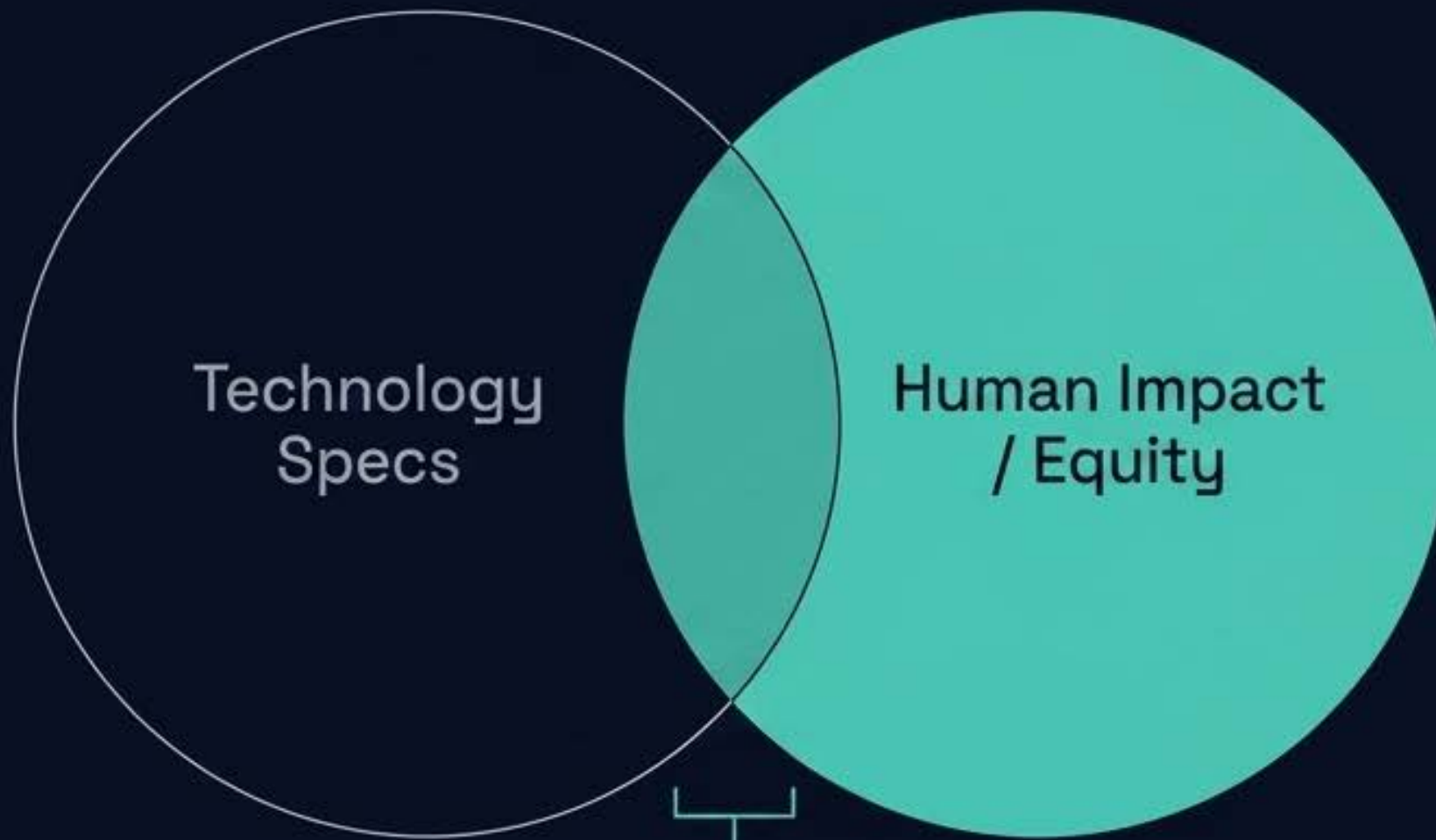
## 2026 Era

"Eliminate gas maintenance,  
lower bills, fix winter drafts."

🔍 Search Query: Heat pump vs gas cost ⚠️ Dwarfs "clean energy heat pump" searches.

**The Trap:** Leading with ideology when the buyer's first objection is practical.

# From technical specs to answering: Who benefits first?



Energy burden evolved from a niche term into standard federal policy (IRA/GGRF).

Programs framed around resident benefits wildly outperform building upgrades.

Underserved markets respond to: lower bills, better air, zero gas-line risk.

Policy narrative drives the highest engagement across the entire energy corpus.

Prohibition creates organized resistance.  
Invitation creates demand.

## Prohibition

The Error: **Gas Ban frameworks.**

Highlights what communities are losing.



## Invitation

The Fix: **Building performance standards.**

Focuses on process and outcomes.



**The Filter:** Does this sentence tell them what they lose, or what they gain?

# Three market signals your messaging hasn't caught up with.

These are not long-term forecasts; these are 12–18 month immediate signals.



1

## **Grid Reliability (The silent veto)**

Immediate impact on adoption as grid stability concerns outweigh individual benefit messaging. Position messaging to address resilience.

2

## **IRA Translation (The adoption bottleneck)**

Complex federal policy language is not translating into simple, actionable consumer steps. The signal is clear: simplify the narrative.

3

## **Quality Assurance (The category narrative risk)**

Market perception hinges on performance. Poor installations and product failures threaten the entire category's growth story.

# What happens when the grid goes down?



## The Fix:

Preemptively address backup compatibility in every single pitch.

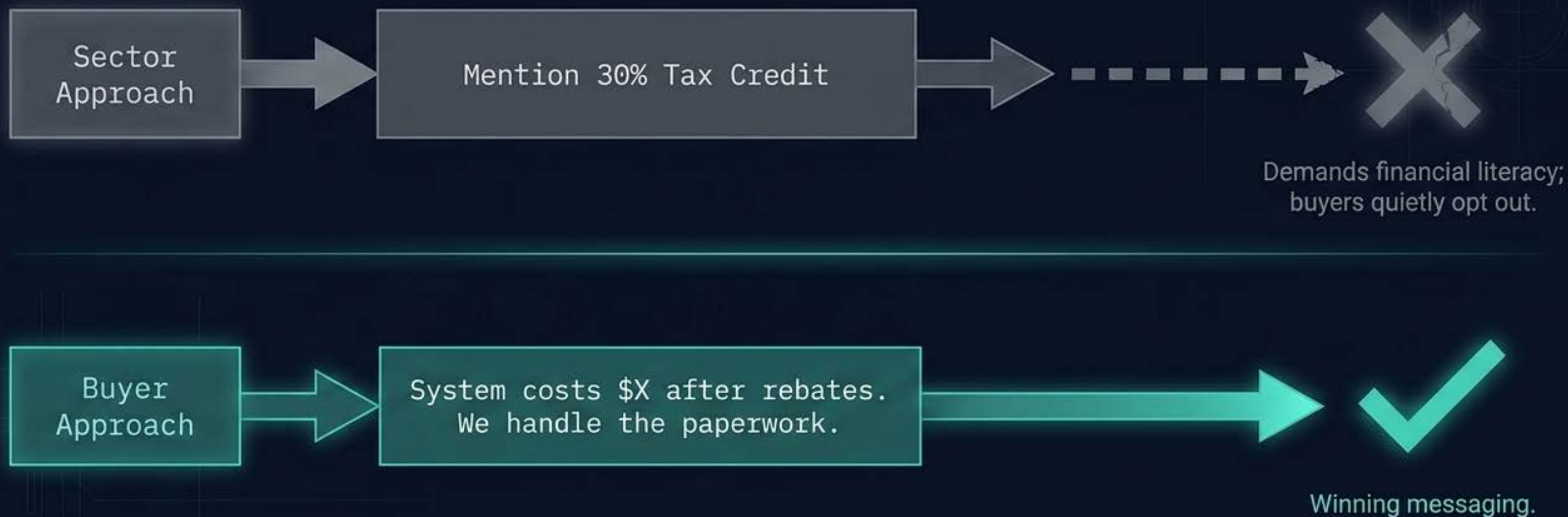
Post-Texas freeze, grid resilience is a first-order, often unvoiced buyer concern.

Buyers say "let me think about it" and ghost you because of unaddressed grid fear.

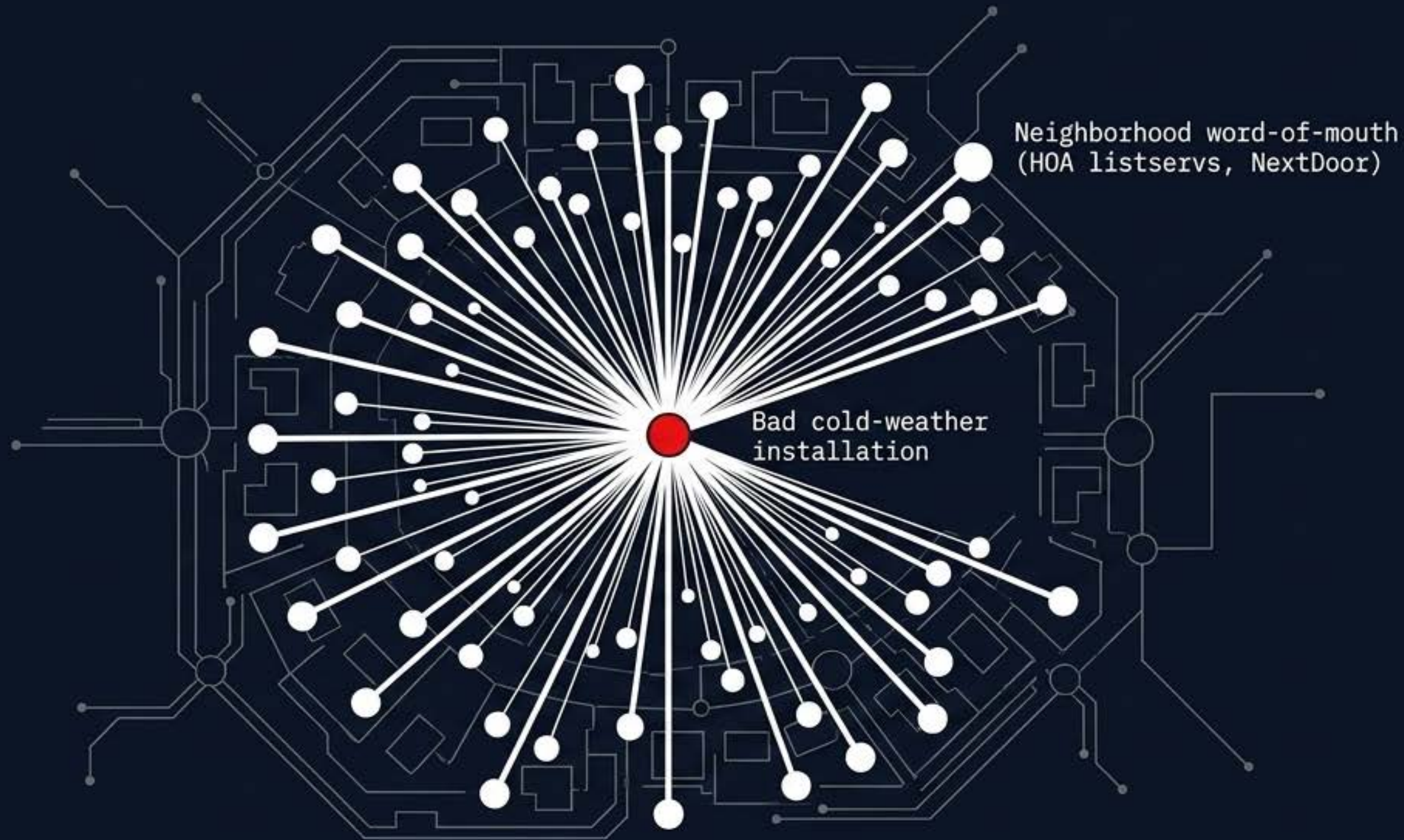
Content addressing "firm vs intermittent" outperforms across all segments.

# The incentive exists. The pathway does not.

The barrier isn't the incentive size; it's the lack of a translation layer.



# Bad installations are creating a category-level crisis



A bad installation doesn't ruin a contractor's reputation; it ruins the heat pump's reputation.

High search volumes for "do heat pumps work in cold" stem directly from neighbor warnings.

**The Fix:** Visibly lead with contractor certification and legible performance guarantees.

# How to test your language alignment today.

## SECTOR SPEAKS

ZNE retrofit

Decarbonization

Total Cost of Ownership (TCO)

## BUYER HEARS

Foreign jargon

Unaddressed winter anxiety

Hidden upfront costs

Show your one-pager to 5 buyers and ask:  
**“What would need to be true for you to take the next step?”**

# You don't need a rebrand. You need these three adjustments.

# 1

## **Audit Your Gap**

Compare your pitch to the exact words used in local Reddit/HOA threads.

# 2

## **Add Resilience**

Add “Compatible with future battery backup” to every proposal, even if unasked.

# 3

## **Translate One Sentence**

Swap “decarbonization retrofit” for “no more gas line safety concerns.”

**The technology is ready.**

**Every speaker at this summit represents a deployable, scaled proof point.**

**The next major adoption curve won't be driven by engineering.**

**It will be driven by matching our language to the people who haven't decided yet.**

**If any of this maps to what  
you're navigating, find me.**

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*(No agenda. Just a conversation.)*