

Planning energy efficiency behaviour change from our customers' perspective

To encourage energy efficient choices and change energy use behaviours, **our customers' needs, motivations and concerns need to be at the centre of our planning**. This checklist helps us to devise and deliver projects from our customers' perspective – leading to increased response, improved cost-effectiveness and less wasted effort.

The customer perspective

What it means for our project

Make it relevant to me

We know that one size does not fit all so, to maximise our effectiveness, each initiative should focus on a defined group, or segment, of people that have things in common.

Deciding which group to target depends on our objectives and resources – we might decide to focus on the group most in need, or the one that is easiest to reach. **The key thing is to be clear about the group we are targeting so we can develop a project that is relevant to them.**

TOP TIP: Defining a target group by their common behaviours (what they do or don't do), tenure, or attitudes to green issues, is more effective than defining a target group by location alone.

Know me

We've identified our target group – now we need **to identify the benefits they are looking for and the barriers that prevent them from acting**. We can also actively involve them in the development of our project ('co-creation'), and test our ideas with them before implementation ('pre-testing').

TOP TIP: Checking the findings from research others have already done will help focus your customer research questions and avoid duplication.

Work with others who know me

We can improve the effectiveness of our project by **involving individuals and organisations from other sectors** who are concerned with our target group and energy efficiency. Partners can provide new insight, additional resources, or a means of reaching our target group; perhaps our customers consider them to be more trustworthy messengers than us?

TOP TIP: Don't forget to involve internal stakeholders such as front line staff in the project's planning from the outset; they may have valuable experience about what works with the target group.

Give me a clear action to take

There are hundreds of actions that people could take to reduce their energy use. We need to focus on one because, for our customers, no two actions have the same set of benefits and barriers – e.g. what might stop people installing solid wall insulation will be different to what might stop them installing loft insulation. **We need to select an action that our target group is likely to take and that has an impact on our objective of energy efficiency.**

TOP TIP: The chosen action must, in itself, deliver the benefit that matters for our customer. E.g. having an energy audit is an action – but it doesn't result in any benefits without additional actions taking place (i.e. installing measures).

**Tell me what's
'in it' for me**

We need to **maximise the benefit that really matters to our target group and will motivate them to act**. This might be a warmer house or lower energy bills. Incentives can trigger one-off actions such as installing insulation. They are not as useful for on-going actions as when the reward stops, so can the behaviour.

TOP TIP: Emphasise the benefits the customer will experience immediately (e.g. 'feel warmer now') rather than those that will come in the future ('living in a warmer home improves your health'). Also stress what is being wasted as well as what can be gained. The benefit of avoiding loss can be a strong reason to take action.

**Make the action
normal for me**

Most of us look to those we trust, or consider similar to us, for guidance before taking action. As domestic energy efficiency measures are often invisible we need to consider how we can provide this **"social proof"**.

TOP TIP: Encourage those who have already acted to promote the benefits of taking action to others. Also, publicising that most people in a certain location have already taken action may prompt those who haven't to do the same.

**Make the action
easy for me**

Our project needs to **lower the most important barriers that are stopping our target group from acting** so it is easier for them act. These barriers might be practical (such as financial cost or inconvenience) or psychological (such as lack of confidence, lack of interest or fear of peer disapproval).

TOP TIP: It may not only be the customer that needs to take action. Check your organisation's accessibility, processes, products and services to see if you are making it as easy as possible for your customers to act.

**Help me to keep
doing it**

For an action that needs to be sustained (e.g. washing clothes at 30°) we need to promote the benefits of, and lower the barriers to, that action over a longer period to **ensure it becomes part of everyday life after our project has finished**.

TOP TIP: If customers are encouraged to set goals, opportunities are created to provide feedback so they can validate their actions, see progress and be motivated to continue. Visual prompts, such as energy monitors and labels on switches, can also remind customers of the benefits of taking action.

A note on evaluation

We want to **measure the actions that have taken place as a result of our project and the impact of those actions**. We will need to determine a "baseline" before our project in order to draw a comparison and, for sustained actions, we will need to measure at different points in time after the project.

TOP TIP: Avoid relying on claimed, or self-reported, actions. Use hard data from meter readings, perhaps from a random sample of the target group. Also consider when you evaluate. Certain actions may be more common in summer so evaluating them in winter may not provide accurate results.

CauseAction

Cause Action provides behaviour change expertise for clients concerned with health and sustainability. We work with them to develop cost effective projects that encourage and support more people to take positive action that improves their lives and their environment. Email richard@causeaction.co.uk



Consumer Focus is the statutory organisation campaigning for a fair deal for consumers in England, Wales, Scotland, and, for postal services in Northern Ireland.