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Recommendations for behavioural intervention programmes

The Step by Step consortium has formulated operational recommendations for the measurement of effects of a behavioural intervention programme aimed at saving energy. These recommendations are addressed to planners and managers of behavioural programmes, energy efficiency experts, local authorities, and behavioural scientists.

1. Take the characteristics of a neighbourhood into consideration when setting project objectives

Within Step by Step, there were significant regional differences in results in terms of participation rate, behaviour changes (basic/complex, investments, etc.) and energy savings.

To set feasible objectives, a good knowledge of the neighbourhood at the project start is crucial.

According to the Step by Step experience, the feasibility of objectives is related/should be adapted to many criteria, among which:

- the profile of the population
- the initial level of awareness of this population
- the social climate in the neighbourhood
- the installed heating system
- the age of dwellings

Setting feasible objectives, can be done by performing a prior deep diagnosis of the neighbourhood, involving the municipality, local stakeholders, the responsible of campaign evaluation and researchers in social sciences. The campaign parameters (number of staff on the field, duration of the door-to-door campaign, sizing of the communication campaign, etc.) should be then sized in function of these different criteria.

2. Competent staff, efficient IT and good communication are crucial to make a success of the mobilisation campaign

The greatest challenges in a successful mobilisation campaign are to minimise the duration of the mobilisation campaign and to maximise the rate of participation.

Step by Step project experiences showed that extending the recruitment of participants entails significant challenges for the operational procedures related to contacts with households. The extended recruitment phase may delay the coaching activities for a substantial number of project participants or negatively influence on the project strong and wide newness effect. Therefore, it is recommended that all project participants are recruited over the shortest period feasible.

Within Step by Step, the targeted participation rate was far from reached (30% instead of 70%, on average). Although the target was not met in any region, the regional differences were big.

Four pillars are identified for a successful mobilisation campaign:

1) Dedicated, well-trained and closely-managed staff

- A skilled team manager, present on the field
- Creation of team spirit among the advisors
- Quality check processes

2) Efficient IT tool to follow-up progress of the mobilisation

- Web interface to follow up advisors' progress
- Automatic alert to identify performance deviations

3) Large scale communication campaign with institutional support

- Letter of the Mayor to each participant
- Article in municipal papers
- Posters, website, social media

4) Combination of door to door visits with public events and “on-the-street” interviews

3. In order to keep up the participation rate during the long term coaching period, monotony should be avoided

The long coaching period is necessary to provoke real and complex behavioural change. Step by Step experience has shown that for the large majority of households, the phone coaching is more effective than coaching through e-mail. However, the risk of losing households' interest is real.

The identified good practices to avoid this are:

- Combine phone calls with door-to-door contacts (however, experience has shown that the effectiveness of this solution is different across regions)
- Adapt frequency of calls to the households' willingness
- Adapt the proposed actions to the profile of the household (age, family, language, local context, etc.)
- Vary the content of the calls
- Communicate collective results to the households in order to create a higher sense of community
- Include the phone advisors in the decision-making process to improve and adapt the communication content

However, Step by Step has shown that not all inhabitants are open to phone coaching. For instance, in Ghent the reluctance towards the phone coaching was high.

4. Differentiate actions suggested to different types of households not only in terms of their psychological profile, but also location (country)

Step by Step project experiences show that suggestions of energy saving behaviours that are given to households should be not only validated by behavioural scientists, but also by local practitioners and energy saving specialist from the point of view of local specifics. These concern for instance widely-used local habits and importance of the targeted energy type in the overall energy consumption balance in the residential sector. The intervention of energy-saving specialist would be also valuable to identify the most impactful energy-saving actions in function of local context and to define if they are applicable or not.

5. Take into consideration cultural specifics in the area targeted

Step by Step project experiences show that it is crucial to adapt the behavioural protocol to the local circumstances. It is recommended to consider adjusting:

- communication channels (e.g. in some circumstances direct door-to-door contacts are much less effective than meeting inhabitants at stands during community events)
- languages (e.g. consider the languages spoken by inhabitants)
- communication tools (e.g. do not make assumptions on the share of households equipped with mobile phones)

6. Plan a separate task to regularly estimate the individualised results to adjust the coaching strategy

Interim results would enable to identify the deviations compared with the initial objective and to adapt the strategy of coaching to fit with participants expectations.

7. Plan a separate task to communicate the individualised results to each household in a timely manner

Typical energy-focused behavioural change programme collects significant amount of energy data. Communicating this information by providing individual, appealing and timely feedback to households has been a subject of several experiments. However, it is still a field of continuous improvements, which requires further research.

8. Consider engaging a subcontractor experienced in coaching activities

Step by Step project experiences show that companies specialising in large-scale communications can serve as effective and efficient subcontractors of cities, NGOs or energy operators interested in running behavioural change campaigns on a large scale. However, it is recommended to cautiously plan the resources to select the subcontractor following several price-quality ratios and presume as flexible contractual arrangements as possible to allow for potential introduction of changes due to external, unforeseen conditions.