

INVENTORY OF SUCCESS FACTORS AND WEAK POINTS IN CASE STUDIES

Annex 4 contains the success factors and weak points which have been identified by programme managers in the cases. Some of the factors have been repeated in multiple cases whereas some of them are specific to an individual case.

Some of the comments could first seem somewhat conflicting. For example, usually it is preferred to involve multiple organisations at different levels (national, local, horizontal) whereas in some cases it has been difficult to encourage them commit to a joint objective under clearly defined programme management. In this case the former comment has been included under “success factors” whereas the latter one under “weak points”.

<p style="text-align: center;">INVENTORY OF SUCCESS FACTORS (reported by the programme managers)</p>
--

CONTEXT

- “Seize the moment!” Sometimes correct timing is everything. How are the energy prices developing? What are the hot topics of public debate? Are there European or national campaigns which create synergy?
- Consider how the diverse needs of the different regions within the country can be met. Ensure appropriate level of control under national brand, whilst providing sufficient flexibility to meet local requirements.
- Make a good analysis in advance of all possible threats; this helps you to react appropriately in case of crisis management
- Technical studies (data on consumption, appliances, consumption habits, level of energy efficiency, most efficient solutions, lifetime of behavioural energy efficiency measures etc.),
- It was suggested in one case study to implement on-going (quarterly) research study to track three core areas;
 - Attitudinal macro drivers on; awareness and belief of climate change, attitudes towards government intervention, attitude towards taking personal responsibility, degree to which cost saving is important
 - Macro climate behavioural change model, to look at the population at a macro level and assess belief in climate change and willingness to change or take action
 - Behavioural change at a specific action level.

PLANNING

The planning process

- Enough time needs to be allocated to the planning phase. In several cases it was mentioned that the programmes had to be planned too quickly.
- Flexibility of the planning process without excessively strict guidelines or timetable. The planning of a novel programme type may be subject to less prejudice than that of a conventional type in a particular country.
- Stepwise development from local to national level has worked well in some cases. Also starting from pilots was suggested. In some others, it was reported that a national initiative which was brought strongly to the local level had worked well too.

Objectives and target groups

- Establish clear and realistic objectives.
- Market segmentation (target groups): careful consideration of the target group/market segmentation (concentration on, e.g., young people, the elderly, larger households, low-income households or those with electric heating) and social marketing strategy for each of them.

Messages

- Showing the advantages of energy efficiency without moralising. Making actions appear both meaningful and achievable.
- Providing feedback to the participants. Feedback could be individual with benchmarking information. Particularly positive feedback was considered as motivating.
- Up-to-date communication approach: humorous and modern language, bright colours, life-style pictures etc.
- Involving several parties in developing the materials.
- Involving target group members in the design of the campaign materials (teachers, youngsters etc.).
- If certain technologies are promoted, they should be robust.
- Provide a high level of accuracy and consistency in the information and advice messages being given to customers, including a common branding.
- The fast changing nature of the discourse of climate change means that it is important to ensure messaging remains relevant to the target audience. Independent discourse analysis has shown that campaigns need to avoid the use of scare tactics and to demonstrate that individuals can make a difference in tackling climate change.
- Because many other messages/events/activities compete over the limited resources (time, money) of the target group, careful planning is essential.

Communication channels

- Learning-by-doing and demonstrations (participatory and interactive approaches) rather than solely cognitive messages. Use of practical tools (e.g. consumption meters, calculation devices) or providing concrete energy saving equipment.
- Do media research (viewer rates etc.)

- Use of a mix of communication channels. Note, that the effectiveness and opportunity to use channels changes over time.
- Use of likeable well-known public figure as a spokesperson (local heroes or green ambassadors).
- Results of learning are partly teacher dependent – the commitment and enthusiasm of the teacher is important
- High level of technical implementation: excellent materials and only quality equipment/appliances should be provided etc.
- TV-based campaigns were considered very successful by programme managements. The reasons could be TV's status as the main media for the general public or the considerable amount of preparation for such a campaign together with the involvement of highly qualified professionals.

General simplicity and practicality

- Simplicity: clear messages, easy access, simple application.
- If subsidies are involved, the application process should be straightforward. There should also be unambiguous specifications regarding the technologies that were supported. For example, in a Spanish example, subsidies were given directly in retail outlets for domestic appliances. However, avoid market disruptions.
- Good logistical system when consumers need to be reached individually in programme implementation. Use existing infrastructures if available.

Institutional aspects

- Use of neutral intermediary organisations instead of messages directly from the government which is not “a trusted” source from the point of view of the public.
- Driving customers to take action on the back of advice whilst maintaining impartiality.
- Networking and co-operation with different organisations, which brings multiplier effects (helps in reaching more participants), providing more communication channels, improving cost-effectiveness, reducing ambiguity and ensuring that there are no “gaps”:
 - Involvement of local energy utilities and local organisations.
 - Involvement of existing professional, information, training and commercial organisations. (However,.)
 - Involvement of the whole product chain from manufacturers to retail to consumers.
 - Creating media interest to enhance indigenous sustainability.
- Avoid conflicts of interests. Furthermore, there could be diversity of interests, e.g. even within one group of stakeholders.
- Using personal contacts to involve the companies and decision makers.
- If the project is implemented in a federal country, additional challenges caused by this should be given due consideration in programme planning.
- Verify in advance whether all stakeholders are sufficiently informed and are in line with the project goals.

Instruments

- Use of a mix of instruments at policy level, e.g. awareness raising and economic or regulatory instruments.
- Use of a mix of instruments at programme level, e.g. goal setting with feedback.

IMPLEMENTATION

- Establishing a project steering group with people from different administrative sectors or otherwise involving them.
- Use monitoring results for sharing the best practices and taking remedial measures during the programme implementation.
- Train you advisors and helpdesks.

MONITORING AND EVALUATION

- Planning a robust monitoring and evaluation approach from the outset. Continuous improvement based on evaluation results.
- Monitoring the campaign launch (detection of flaws, collection of frequently asked questions, instructing advisors and trainers) provides an opportunity for correcting action.
- Use a team of multidisciplinary specialists, also those in communication and training, to formulate questionnaires and interview questions used in evaluation. Questions must be clear and not open to different interpretations. Pre-test the questionnaire. Train the interviewers.
- Strike a balance between the risk of free riders and the cost of trying to avoid them all.

GENERAL ASPECTS

- International exchange of knowledge and experience.
- Long-term approach is preferred. However, examples of successful short-term campaigns exist.

INVENTORY OF WEAK POINTS

(reported by the programme managers)

CONTEXT

- In some cases general low environmental awareness or low educational level of the target group creates additional challenges. How to reach customers who are unaware or apathetic about domestic energy consumption issues?
- There have been difficulties in extending a programme to all regions in a country.

PLANNING

The planning process

- Too short preparation phase.
- No behavioural theories were used in programme design

Objectives and target groups

- No needs assessment was done.
- The campaign should have been segmented more clearly to the different target groups. The messages could have reached the target groups better.

Messages

- Negative feedback de-motivated people.
- Quality problems with the service (advice etc.)
- The rules how to use the campaign logos and “the look & feel” should have been more precise
- More comprehensive consultation of various institutions should have been carried out in design of the campaign and materials. This could also have helped in dissemination.
- A pre-test should have been run on the material produced – prior to its broadcast – before a target audience to evaluate its effectiveness, quality of the messages, understanding, etc.
- Existence of disinformation: outdated technical facts, rumours, urban legends etc.

Communication channels

- During a TV campaign, there was not enough attention given to other information channels such as a web-site with more information.
- During a campaign addressing children, consideration should also have been paid to addressing the parents and involving the schools.
- Consumers had excessive expectations for services (advice etc.)

- The possibility of continuous use of material after a campaign targeting schools was not recognised
- Marketing of the campaign for the possible participants did not fully succeed and face to face marketing instead of distributing leaflets or invitations could work better.
- More interactive contents at the web-site would have increased the number of visitor (but also requires a lot more resources)
- Internet training course for salespersons was not found effective.
- Lack of personalized attention.

Institutional aspects

- Conflicts of interest.
- More commitment of the participating organisations and companies was expected.
- Problems in building up the networks and motivating multipliers, particularly, when they have no economic gain.
- The composition of the programme consortium was criticized.

IMPLEMENTATION

- Quality problems with equipment, props, manuals etc.
- Challenges related to the specific features of the promoted technology.
- Logistical problems when consumers needed to be reached personally
- Inadequate information on all relevant stakeholders.

MONITORING AND EVALUATION

- The evaluation did not adequately address actual behavioural changes.
- It is difficult to document long-term effects on energy behaviour, particularly in terms of energy units. There is no robust information of the lifetime of energy savings generated by behavioural change.
- Dissemination of the results should have been improved.

GENERAL

- Bad luck (e.g. bad weather in outdoor events, coinciding competing activities for the target group)
- Too tight budget compared to objectives, unexpected budget cuts or continuous financial insecurity hampering long-term view.
- Resource constraints limited the possibilities to deliver the offered services causing frustration in consumers (advice etc.).
- It was not possible to set up a programme which identifies unequivocally the market effects of the programme.