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T2.2 : BEHAVIOURAL SURVEY AND CHANGING BEHAVIOURS

Task 1 : “The objective of this task is to understand the triggers, the motivations and the restrains for changing behaviour.”



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T2.2 : BEHAVIOURAL SURVEY ON CHANGING CONSUMERS' SUSTAINABLE ENERGY BEHAVIOUR

- Objectives of the project
- Methodology
- Discussion guide
- Results :
 - Energy – Sustainable energy
 - Triggers and barriers to change behaviour
 - Triggers and barriers by RES
- Recommendations and Takeaways





Objectives of the project

Objectives

WP2 has as main objective to gather relevant and key information for consumers and about consumers. GfK survey showed that consumers need personalised answers. The best solution for a specific house (as well as the final profitability of the system) depends not only on the characteristics of the house and the performance of the appliances, but also on the consumption profile of the family. For this reason, WP2 has as main objective to link consumer behaviour and consumers' real use of technologies with technology performance and optimization potential.

WP2 is core work-package of the proposal and it has two pillars.

The first pillars gathers the first four tasks:

T2.1- Global Behavioural study of household profiles

T2.2- Behavioural survey and changing behaviour

T2.3- Monitoring of devices to optimise the self-consumption (batteries and other system)

T2.4- A-posteriori analysis of the consumer's satisfaction and behavioural impact

Task 1 : "The objective of this task is to understand the triggers, the motivations and the restrains for changing behavior."





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Methodology

MROC (Marketing Research Online Community)

Online Platform.

Duration : 1 week

Target : Energy (co-)decision makers in household. Ensure the presence of different house types (flats, semi-detached house, detached house, ...). Particular attention for owners or not of their house.

Recruitment : quotas on tenants / owners and lodgment characteristics





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Local Partners :



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Discussion guide

We proposed a common discussion guide for all the countries with opportunity for the local partners to customize it in function of local specificities

Structure of the guide :

Step 1 : Current experience

Introduction

Presentation of participants and objectives. Family situation, house (flat, apartment, house, small, big, independent, ...), owner or not, geographic situation (in a city, ...), current consumption level, ...

Current and future behaviours regarding energy - sustainable energy.

Willingness to change.





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Discussion guide

Step 1 : Current experience

Changes they already did

Examples - motivations – Triggers - difficulties - Problems - + and – differences

Changes they would like to do

What ? Why ? Why not yet ? Triggers that could help to decide ?

Changes they decided not to do

What ? Why ? What could change their opinion ?





Discussion guide

Step 2 : Repeated sequence for following items :

Solar panels – Batteries for house – Pellets stoves - Air conditioning or Heat pumps

- Short explanation - Already installed ? –
- **If yes** : motivations - triggers - decision process - administrative and permits process
- **If not**, why ? Already thought about it ? Why not ? Restrains ? What could convince ? Possible triggers ? Perception about the administrative and permits process

Conclusion of task 1 :

Tribunal : Find Pro and contra's arguments to change their behaviour

Complete the 3 sentences below :

- I change my behaviour regarding sustainable energy because
- I would like to change my behaviour regarding sustainable energy because ... but ...
- I don't want to change my behaviour because ...





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RESULTS



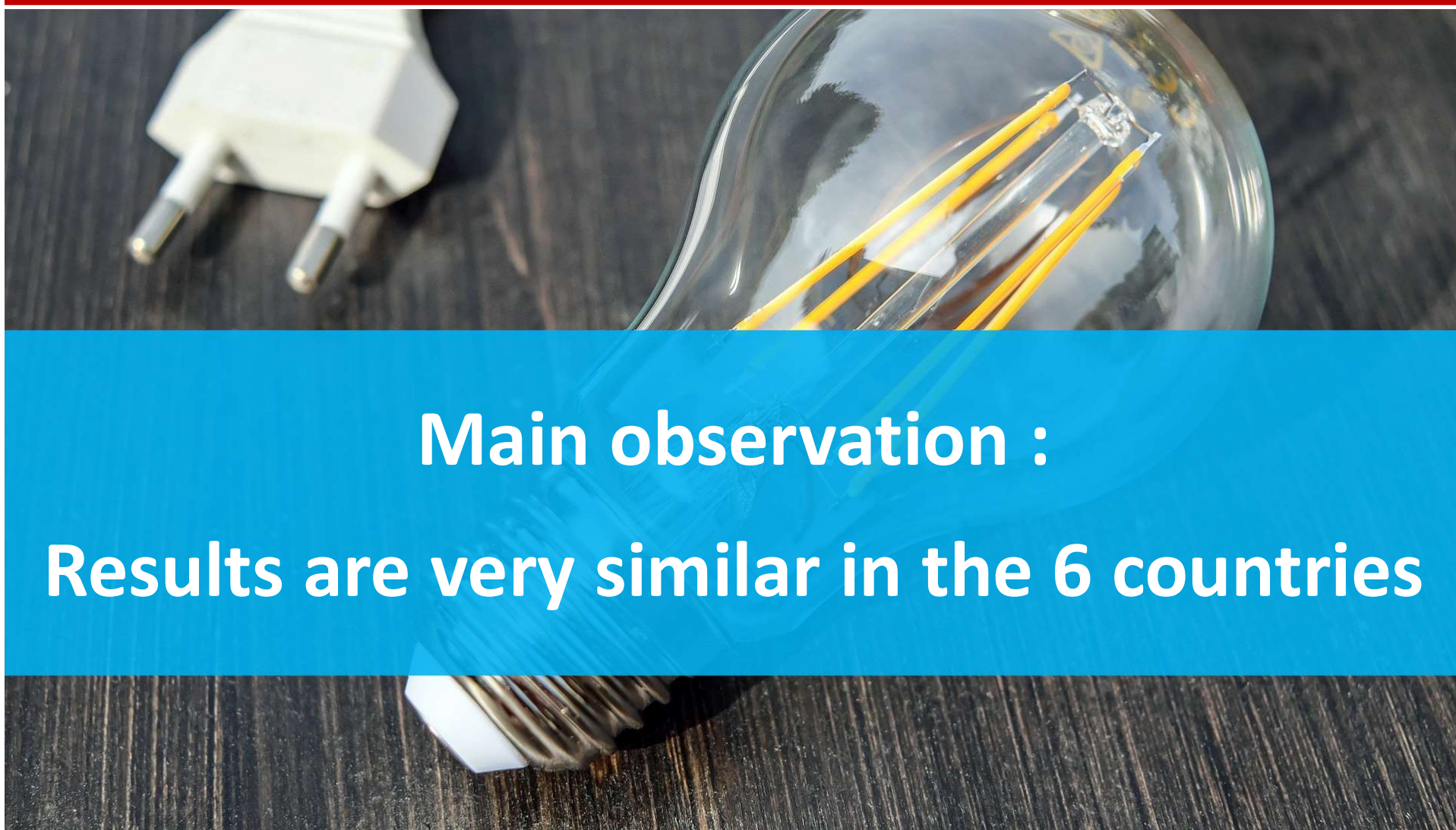
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Main observation :
Results are very similar in the 6 countries



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What about energy ?

- Majority of participants care about their use of energy
- They are tracking how much they spend for it per month rather than how much they consume.
- The most significant element influencing their behaviour and attitude regarding energy is price.
- Money is the biggest topic when it comes to energy and can be both driver and barrier in energy behaviour
- The majority adopted already several measures to reduce their energy consumption





What about Sustainable energy

- Most often associated with renewable or green energy sources
- Almost all respondents are convinced that this is the right way, important for the future of the environment and future generations
- For both people who implemented initiatives of sustainable energy and those who have not, is money the main reason.

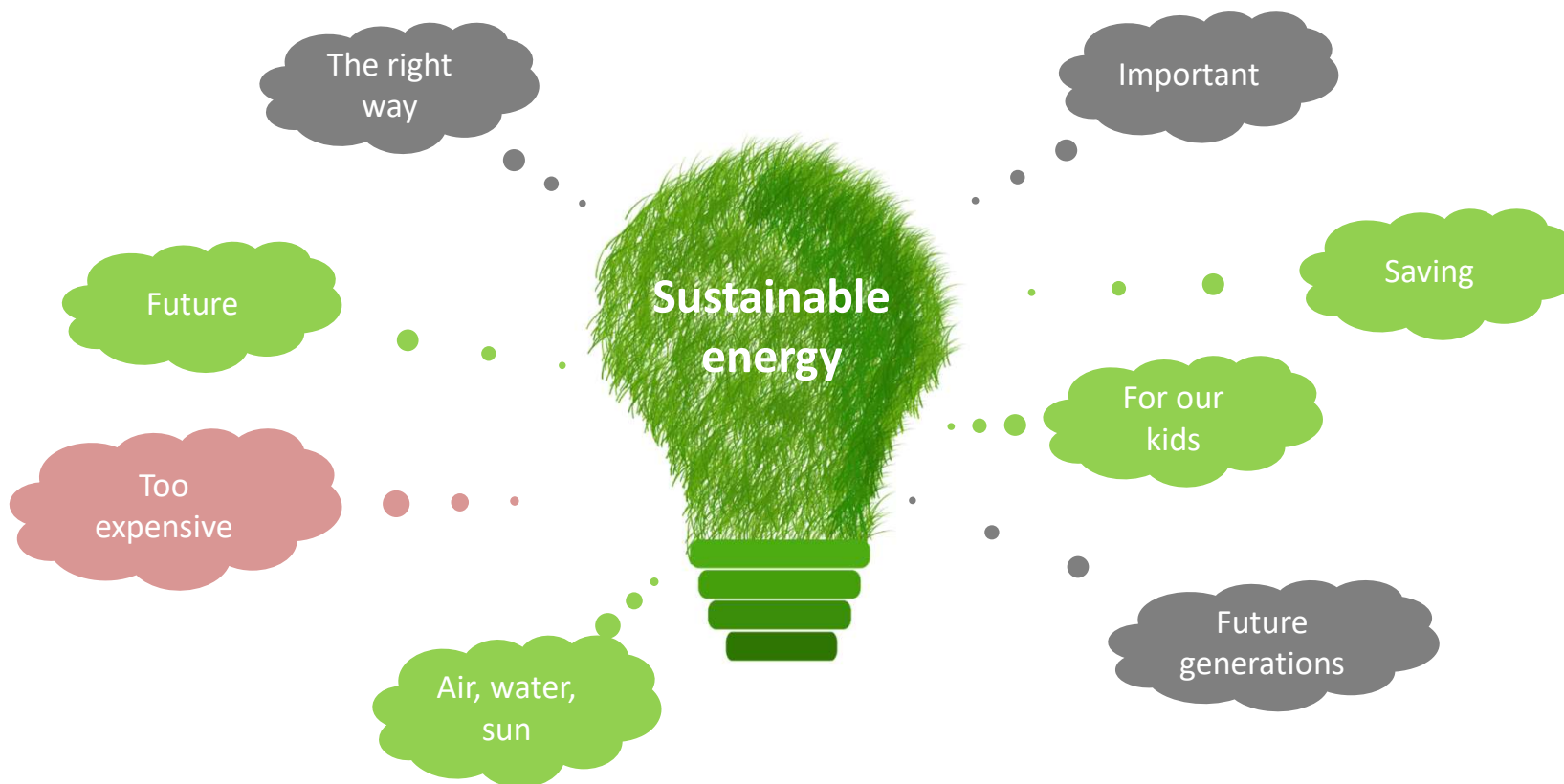




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What does sustainable energy mean to our participants?





SUSTAINABLE ENERGY

Sustainable energy is considered inherently different from 'normal' energy, but is positively evaluated



'NORMAL' ENERGY

- **Image:** seen as basic, 'traditional' energy, that doesn't take the environment into account
- **Production:** produced by nuclear power plants, with exhaustible sources
- **Impact:** does harm the environment and affects future generations
- **Price:** perceived as rather cheap in comparison to sustainable energy



SUSTAINABLE ENERGY

- **Image:** perceived as 'green energy' or 'alternative energy', that is environmental friendly
- **Production:** produced by solar panels or wind mills, with inexhaustible sources
- **Impact:** doesn't affect future generations or harm the environment
- **Price:** often perceived as more expensive than 'normal' energy





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Main triggers to change behaviour :



Saving money : lower bill – selling produced energy – tax deductions and/or subsidies



Environmental responsibility – preserve the next generations : it's a trigger but not enough alone



Word of mouth and experience of other people are very important



Social recognition



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When it comes to sustainable use of energy I would like to change my habits because ...



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Main barriers to change behaviour :



Lack of knowledge of sustainable energy solutions and their financial impact – subsidies - ...



Costs are high and return on investment is not always clear : difficult to calculate the cost-benefit ratio



Legislation and bureaucracy are often unclear or complex



Need to change/renovate the house





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When it comes to sustainable use of energy I would like to change my habits but ...

lack of will low awareness I don't have enough influence
financially incapable established habits
not beneficial enough too high investment
bureaucracy i live in an apartment building time consuming
changes are difficult



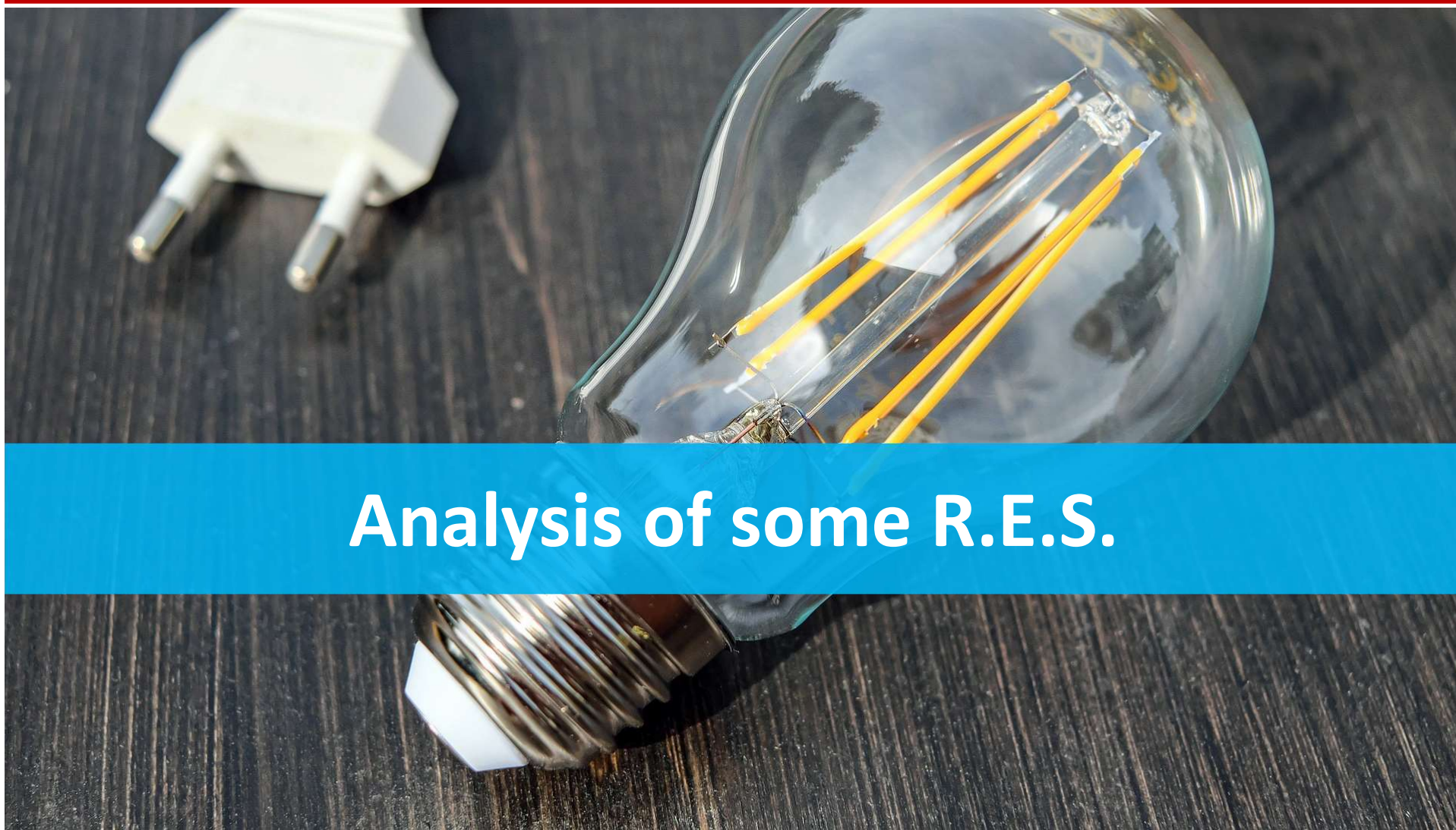
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Analysis of some R.E.S.



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People who have implemented one of the initiatives of sustainable energy are happy with the result as it meets their expectations on economical and ecological level.

Solar panels are the most obvious initiative of sustainable energy thanks to its popularity

In contrast, awareness and knowledge of home batteries are rather low.

Pellet stoves are known by some and evoke varied reactions : some people didn't know the link between pellets and sustainable energy



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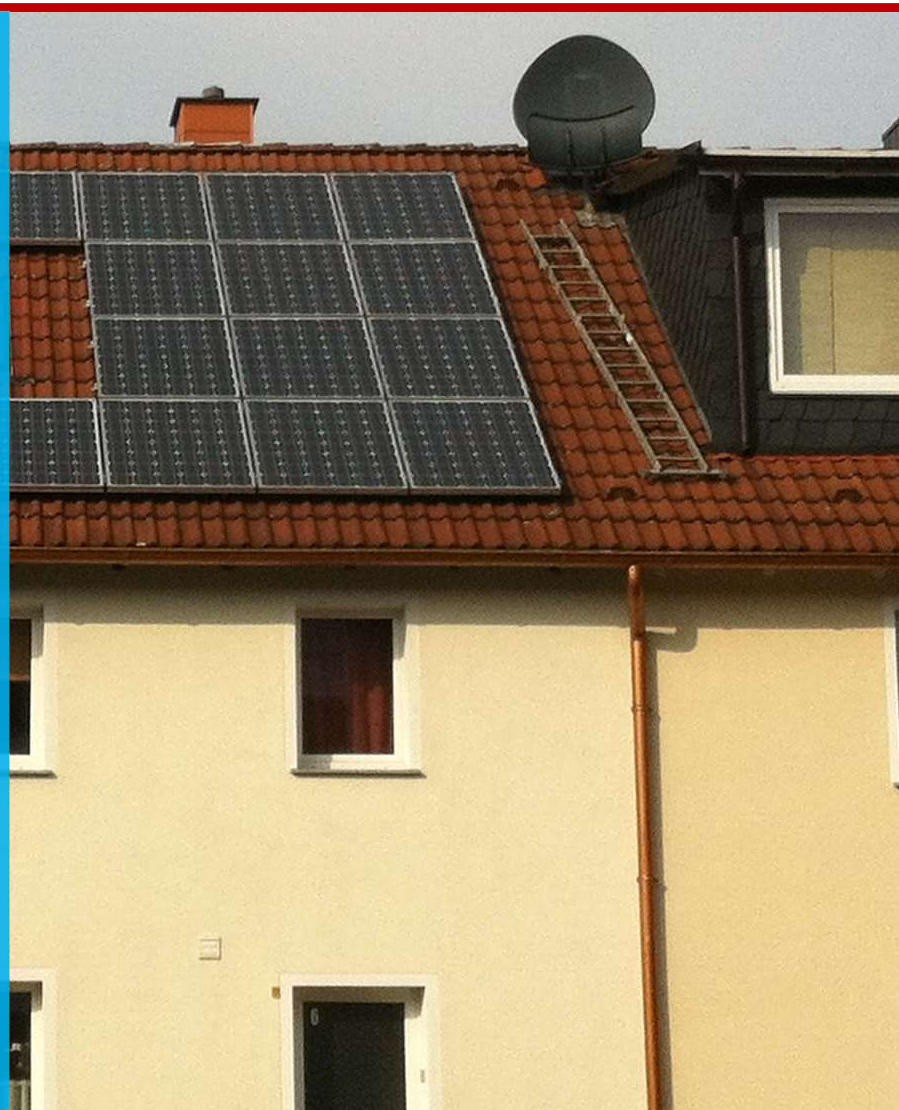
SOLAR PANELS

Motivators:

- Financial saving
- Ecological thinking
- Self-efficiency
- Recommendation
- Tax reductions/subsidies

Barriers:

- Initial cost
- Financial returns too long and difficult to estimate
- Possible only for houses
- Difficult administration



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PELLETS STOVES

Motivators:

- Savings
- Need for a new one
- Easy to operate
- Cosy ambience
- Modernity – innovation - ..

Barriers:

- Impossible for every type of housing
- Too expensive
- Usability is lower than central heating (need place for stocking pellets)
- Only heats one room
- Difficult administration connected to the subsidies



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AIR CONDITIONNING HEATING PUMP

Motivators:

- Multi-functional appliance
- efficient and easy to use
- Low energy consumption
- Can be used both on hot or cold weather
- Able to heat in very short time
- Possibility to turn it on only in one room

Barriers:

- Perceived as expensive solution
- High electricity consumption
- Once switched off room cools down quickly
- They heat a room but struggle to bring a whole house to the right temperature



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HOME BATTERIES

*Note : nobody has it at home and solution not well known by participants
Only asked in BE and IT*

Motivators:

- Autonomy
- In addition of solar panels
- Allows to accumulate energy provided by solar panels

Barriers:

- Costs
- No information about efficiency, investment, capacity, durability
- Uncertainty





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Recommendations



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In the light of these findings, the **main consumer needs regarding sustainable energy** are :



To develop campaigns about the benefits of adopting a RES, explaining in a simple way what can be done and how



Need for greater clarity regarding the financial return and the time needed to recoup the initial investment. Financial support, pricing packages to acquire/install the equipment will encourage people.



Support in understanding the legislation and more information about any bureaucracy involved in the change process





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3 Takeaways



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1. Behaviours, triggers and barriers regarding sustainable energy are almost identical in the 6 countries
2. Almost all the participants are sensibilized to sustainable energy and, if not yet done, are ready to change their behaviour if the conditions to do it are met
3. Finance is the key element even as trigger to reduce consumption costs as as barrier to install it



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Thanks for your attention

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