



## World-wide experiences of consumer recruitment

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# WORLD-WIDE EXPERIENCES OF CONSUMER RECRUITMENT

ADDRESS INTERNATIONAL WORKSHOP  
*ACTIVE DEMAND: THE FUTURE OF ELECTRICITY*

Sarah Mander, Tyndall Centre for Climate Change Research  
Paris, June 9th 2010

# engagement

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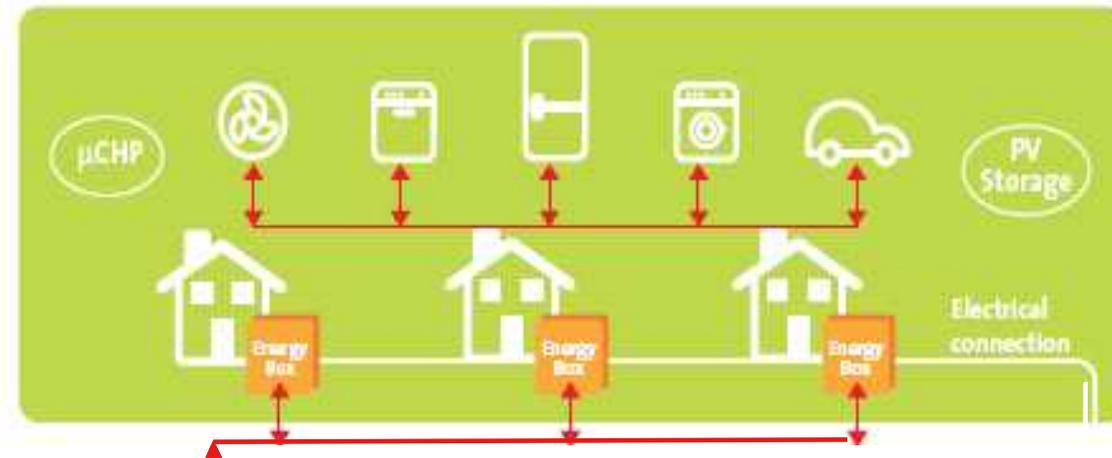


The research leading to these results has received funding from the European Community's Seventh Framework Programme (FP7/2007-2013) under grant agreement n° 207643

# Presentation outline

- Review of the ADDRESS concept
- What projects have informed this presentation?
- How to make initial contact with consumers
- Motivation - why do people take part in a field trial?
- How to get people on board?
- Installation of equipment from the perspective of consumers
- Installation of equipment from the perspective of the organisers
- During the trial
- After the trial
- Summing up

# The ADDRESS concept



We wish to:

- Recruit consumers to meet ADDRESS field test criteria
- Install and test equipment in their homes
- Train consumers so they can take part in the field tests
- Gather data: quantitative and qualitative

# Analogue projects

ADDRESS combines:

- Active demand management
- Smart metering
- Distributed generation

It is also useful to consider best practice from other field trials

Active demand management projects	Smart metering
Ontario Energy Board Smart Price trial	UK Ofgem Energy Demand research
Commonwealth Edison Time Tariff trial	Iberdola – Majadahonda project
EDF	ENEL
Olympic Peninsula project	

# Finding participants

First you must clearly define:

- Your recruitment strategy
- Your test criteria

There are many ways of making initial contact:

- Direct mailing through participating suppliers
- Target participants who may meet criteria using information from suppliers
- Contact through community organisations
- Social marketing methods: media, indirect mailing, flyers

# Finding participants

## ¿En qué consiste este programa?

En IBERDROLA trabajamos cada día para ofrecer a nuestros clientes un mejor servicio. Con ese propósito hemos puesto en marcha el Programa **TELEGESTIÓN DE LA MEDIDA DEL CONSUMO**. Una acción del Ministerio de Industria y Energía, en el que colabora activamente IBERDROLA; un sistema que facilita la gestión del consumo de electricidad, lleno de ventajas, con el cual nos podrá tener aún más cerca de usted.

## ¿Qué elementos se requieren?

- Un nuevo contador que sustituye al actualmente instalado y que incorpora un mecanismo para transmitir información.
- Y en algunos casos, un indicador de consumos y mensajes -denominado unidad tarifaria- que le permite solicitar y recibir información de IBERDROLA mediante un sencillo teclado y una pantalla.



## ¿Qué ventajas ofrece la telegestión?

### Ventajas al instalar el nuevo contador:

- ★ Lectura del contador cuando lo desee.
- ★ Localización de averías con mayor rapidez.
- ★ Modificación de las condiciones de potencia o tarifa sin cambiar de contador.

### Ventajas adicionales para los usuarios de la unidad tarifaria:

- ★ Acceso directo a la información: registros de consumos, precios y otros mensajes de su interés.
- ★ Mayor información para optimizar el consumo eléctrico.
- ★ Lectura remota del contador, evitando las visitas del lector y permitiendo una facturación más regular.
- ★ Facturación exacta e instantánea en bajas de suministro y cambios de usuario.
- ★ Posibilidad de controlar automáticamente los electrodomésticos conectados a circuitos específicos.
- ★ Posibilidad de gestionar otros servicios, tales como el agua, alarmas, etc.

Si desea más información, estamos a su disposición en el Teléfono del Cliente, **901 20 20 20**.

Source: Iberdrola, 1997

# Finding participants

First you must clearly define:

- Your recruitment strategy
- Your test criteria

There are many ways of making initial contact:

- Direct mailing through participating suppliers
- Target participants who may meet criteria using information from suppliers
- Contact through community organisations
- Social marketing methods: media, indirect mailing, flyers
- **Social contacts: people will talk to their friends about the project!**

## Motivations – why do it?

People take part in field trials for a number of reasons:

- To save money on their energy bills
- To receive an incentive
- To reduce their impact on the environment
- Because they are interested in the new technology
- To improve electricity network operation
- To stop wasting electricity

# How to get people on board

Financial benefit is an obvious reason for participation:

- Free, or cheap smart appliances
- Fixed financial payment, linked to completion of trial
- Variable financial payments
  - Fixed fee with penalties/rewards for using an over-ride feature
  - Shadow market

Other are less obvious but equally important:

- Community benefit
- Enthusiasm for the trial

# Installation from the perspective of the participant

Installation will be people's first experience of the equipment

- First impressions count!
- Does the householder know how to use the equipment?
- Can they tell their husband, wife, mother?
- Is the brochure easy to understand?
- Is it clear what participants must do?
- Is there a 'help-line?'
  - Is it free to call?
  - Do the staff know about the trial?

# Installation from the perspective of the organisers

## The trial is a team effort

- Can installers explain the trial?
- Every person and property is different!
- Do service centre staff know about the trial?
- Are the responsibilities of the trial organisers clear?

Data management is crucial – one database!

Lives are very busy, getting access may be the biggest hurdle

# During the field trail

Keeping in touch maintains enthusiasm and motivation for the trial

- Newsletter
- Project website

Email can be used to keep people up to date with appointments and other logistical information

Contact with the aggregator

- Phone
- Text message

## At the end of the trial

Remove equipment and return property to pre-trial condition

People have given their time and energy to the trial, this needs to be acknowledged

Has the trial highlighted where people could save energy?

- It is good practice to point people to appropriate sources so they can take action in response to this information

# Summing up

This presentation has provided an overview of a range of strategies for each element of the ADDRESS field trials

Recruitment can be challenging, plan early, check progress, be flexible

Everyone is different

Good data management and communication are crucial

First, and last, impressions count!

# THANK YOU

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