



Programme Area: Smart Systems and Heat

Project: WP1 Consumer Insights

Title: Consumer Insights Toolkit

Abstract:

This report has been produced by the Energy Systems Catapult as part of the Smart Systems and Heat Phase 1 Business Model Development Project. This report is a toolkit of visual aids designed to help inform the design of products services and polices so they can successfully decarbonise heating in the UK. Among other things the toolkit includes household, building and heating systems icons and physical flash cards that enables engineers, policy and decision makers to think through the consumers' perspective when designing a heating system or heating policy.

Context:

This project will provide insights into consumer behaviour relating to heat decisions. The project will be made up of four small pieces of consultancy work looking at specific issues:

- Consumer Response & Behavious Analysis
- Literature Review Personality and Risky Heat Decisions
- Household Heating Design Aids
- Segmentation Analysis

Disclaimer:

The Energy Technologies Institute is making this document available to use under the Energy Technologies Institute Open Licence for Materials. Please refer to the Energy Technologies Institute website for the terms and conditions of this licence. The Information is licensed 'as is' and the Energy Technologies Institute excludes all representations, warranties, obligations and liabilities in relation to the Information to the maximum extent permitted by law. The Energy Technologies Institute is not liable for any errors or omissions in the Information and shall not be liable for any loss, injury or damage of any kind caused by its use. This exclusion of liability includes, but is not limited to, any direct, indirect, special, incidental, consequential, punitive, or exemplary damages in each case such as loss of revenue, data, anticipated profits, and lost business. The Energy Technologies Institute does not guarantee the continued supply of the Information. Notwithstanding any statement to the contrary contained on the face of this document, the Energy Technologies Institute confirms that the authors of the document have consented to its publication by the Energy Technologies Institute.

Consumer Insights Toolkit



Step 01:

Start to build each permanent occupant by adding 'occupant i and 'attribute icons' to each bo the right.

Step 02:

Verbalise, discuss and agree o aspects of each attribute that y think are important, noting ther down in the spaces provided. don't think an attribute applies t the occupant e.g. they don't rea have any individual priorities, le the box blank.

Step 03:

Think about and record whethe you think each icon or attribute 'evidence' or 'assumption' base do you have evidence that the attribute is important or are you assuming it could have impact Circle the most relevant square top right of each box using the below.

Step 04:

Think about how important eacl icon and attribute is to the over issue you are interested in. Cir the most relevant square in the right of each box using the key below.

Step 05:

Finally, note any links between attributes that impact on each at the base of each box.

Attribute Evidence Key:										
	Evidence Based									
	Assumption Based									

Attribute Importance Key:



Low Importance

Who are they?	Are they employed?	What is their qualification level?	What do they earn? Are they willing to pay?
Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:
How do they pay for their and a set of the 	What is their thermal sensitivity level?	What do they individually prioritise?	Are they proactive, reactive or 'hands off'?
Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:
What relevant health concerns do they have?	How many showers & Market Show baths do they have?	What pets do they have?	Anything else that is important to note?
Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:

Consumer Insights Toolkit 'Occupant Builder'





Consumer Insights Toolkit 'Occupant Icons & Occupant Attribute Icons'





Middle-Aged Couple

Older Couple



Income / Willingness to Pay (low)



Individual Priority: Hygiene



Income / Willingness to Pay (mid-low)



Individual Priority: Peace of Mind



Instructions: What type of house is it? What size is the house? What is the state of its How old is it? thermal loss? Step 01: Start to build a house and current central heating system by adding 'house icons' and 'house attribute icons' to each box on the right. Step 02: Verbalise, discuss and agree on the aspects of each attribute that you think are important, noting them down in the spaces provided. If you don't think an attribute applies to the house or central heating system e.g. there is no hot water Attribute could also impact on: Attribute could also impact on: Attribute could also impact on: tank, leave the box blank. Step 03: Think about and record whether you think each icon or attribute is What fabric-based energy Is it on or off the gas grid? How many showers or 'evidence' or 'assumption' based saving features are there? bathrooms are there? do you have evidence that the attribute is important or are you just assuming it could have impact? Circle the most relevant square in top right of each box (see key). Step 04: CO Think about how important each icon and attribute is to the overall issue you are interested in. Circle the most relevant square in the top right of each box (see key). Step 05: Attribute could also impact on: Attribute could also impact on: Attribute could also impact on: Finally, note any links between the attributes that impact on each other at the base of each box. Do any of the occupants attributes impact on the house and heating system attributes? How many radiators are How is the hot water Are there any renewable there? Total output? heated? energy sources? Attribute Evidence Key: Evidence Based Assumption Based Attribute Importance Key: High Importance Medium Importance Attribute could also impact on: Attribute could also impact on: Attribute could also impact on: Low Importance

Consumer Insights Toolkit 'House Builder'

What is the state of its thermal mass?	
Attribute could also impact o	on:
What type is its primary central heating system?	
Attribute could also impact of	วท:
Anything else that is important to note?	





End-Terraced

Thermal Mass:

Heavyweight

Detached



On Gas Grid

Semi-Detached

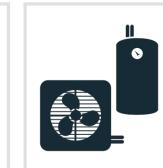


Bungalow

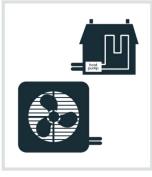
Boiler (no tank)



Mid-Terraced



Flat / Apartment



Thermal Loss: Airtight



D²

Number of Radiators

Renewables



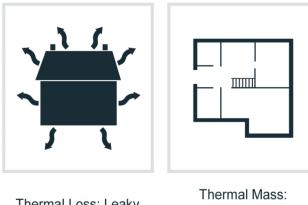
Off Gas Grid

Fixed / Portable Local Heating / Cooling Strategies

Boiler (with tank)

Airsource (with tank)

Hybrid Heat Pump



Thermal Loss: Leaky



District Heating

Lightweight



Storage Heaters



Step 01:

Add your floor plan to the blank space to the right.

Step 02:

There are a number of things you can think about to help you understand the property and how it is used. We've included some examples and likely tasks below to get you going but be sure to refer back to the 'instructions' for more help with the floor plan tasks.

For example, think about the direction the houses faces, and whether it experiences any solar gain or strong winds. Perhaps indicate North on the floor plan and draw a sun or some 'gusts of wind' to show solar gain or colder areas.

You could also consider where the components of the central heating system are located throughout the property or where the original gas and electricity meters are located.

We've added a key with some 'blanks' so additional important things can be labelled and added to the floor plan.



Consumer Insights Toolkit 'Explore the house'



Instructional	Key:	1							
Instructions:									
Use this template to explore the your 'hunt statement' across a day.	E.g. When a certain occupant is in								
Step 01:									
Think about what you want to look more closely into. Is it who is in at different times during the day? Or is it the status of the central heating throughout the day? Or the point when something in particular goes wrong (e.g. the central heating system breaking).									
Step 02:									
Use the key and blank spaces to the right to note down what you are exploring in more detail (e.g. when an occupant is in), and then using timeline chart when they are in or out. You can do the same for any number of occupants, their comfort preferences, and which									
rooms they are occupying at different times or anything that might impact on your 'hunt statement' during the course of a particular day.									
Step 03:									
Use the insights box at the bottom to capture anything important that comes from your explorations and discussions. You can also refer back to the 'instructions' for more detail on how to use this template effectively.									
P.S. Don't forget to fill in the boxes below to give some additional									
context!	Insights:				_				
Day:									
Week:			 			 			
Month:									
Year:									
Ext. Temp:					_				

Consumer Insights Toolkit 'A day in the life of'





Use this template to explore the your 'hunt statement' across a range of different days.

Step 01:

Think about what days you want to look more closely into and what kinds of things might be happening. Is it a laundry day? A day when everyone is in or out? The day before a family go on holiday? You can note the type of day to the right at the top of the each timeline.

Step 02:

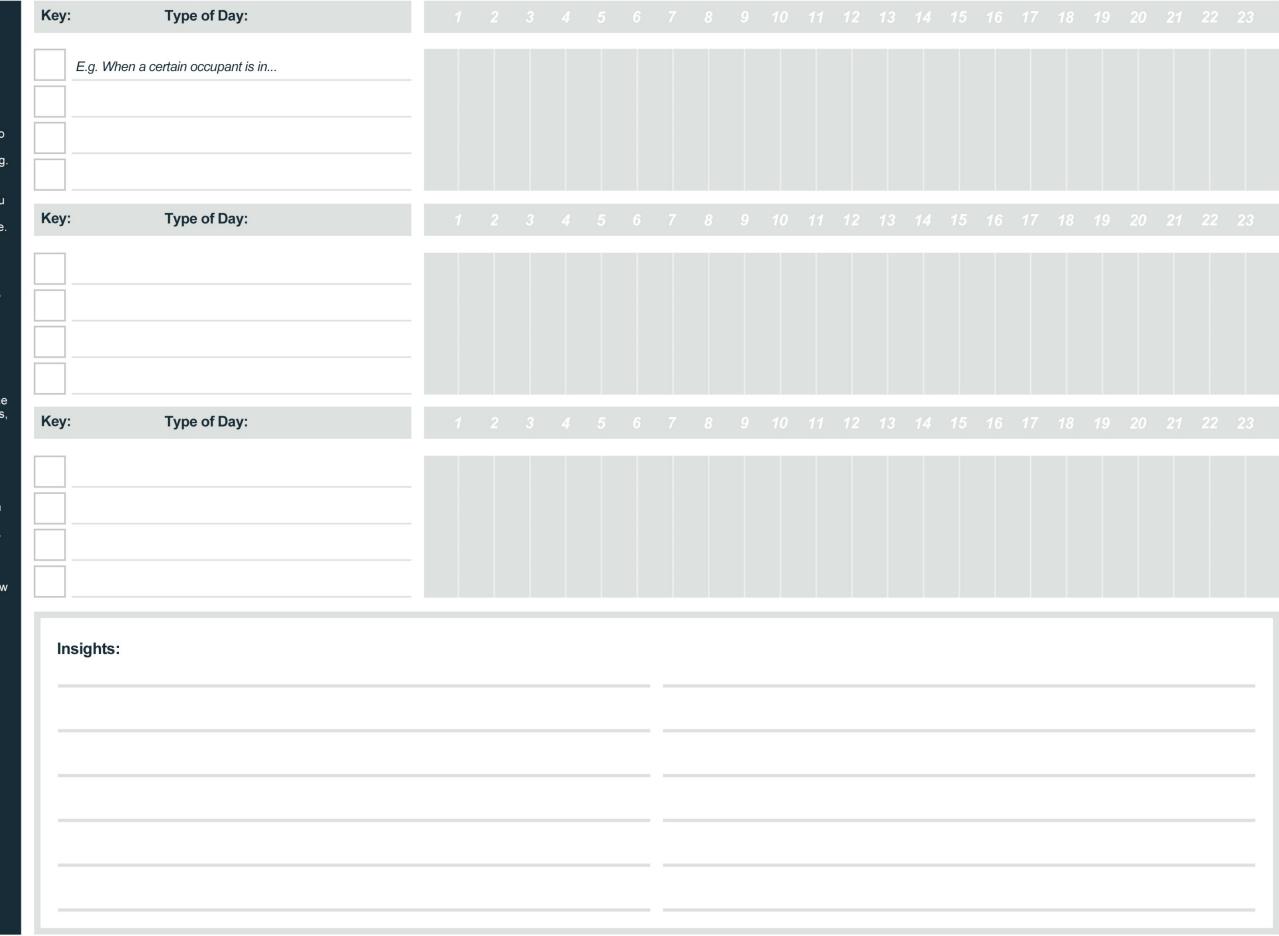
Once you have chosen your 'days of interest', use the key and blank spaces to the right to note down what you are exploring in more detail on each type of day (e.g. when an occupant is in or when the heating is on). Using the timeline chart what is happening throughout the day. You can do the same for any number of occupants, or anything that might impact on your 'hunt statement' during a range of different days.

Step 03:

Use the insights box at the bottom to capture anything important that comes from your explorations and discussions.

You can also refer back to the 'instructions' for more detail on how to use this template effectively.

P.S. Don't forget to give some context - note what types of days you are exploring!



Consumer Insights Toolkit 'A range of days in the life of'



Use this template to explore the your 'hunt statement' across a particular month...

Step 01:

Think about what month you want to look more closely into and what kinds of things might be happening during that month. Which days are people out at work? When is the laundry done? Do the any of the occupants go on holiday for a short break? You can also note what day each box refers to (i.e. Monday) in the bars running along the top of the 'month' grid.

Step 02:

Note the type of things that happen on different days on the squares, like a calendar. You can also colour code the days based on what type of days you think they are by using the key to the right of the page. Add a colour to one of the blank boxes and note next to it what it represents (e.g. a weekend day, or 'work at home day'). You can do the same for any number of occupants, or anything that might impact on your 'hunt statement' during a particular month.

Step 03:

Use the insights box at the bottom to capture anything important that comes from your explorations and discussions.

Step 04:

Once you have created an impression of a 'typical' month you might decide you need to focus in on a particular day (e.g. a day when a relative comes to stay).

You can also refer back to the 'instructions' for more detail on how to use this template effectively.

P.S. Don't forget to give some context - note what month and year you are exploring!

						Key:
1	2	3		5	7	E.g. Short brea
8					14	
22					28	
		31	Month: Year:			

Insights:

Consumer Insights Toolkit 'A month in the life of'

reak on holiday	
•	
	_
	-
	- 1
	- 1
	-
	1



Start to explore a year in the life of your occupants or rooms in their house using this template.

Step 01:

Think about what kinds of things might be happening during a particular year. Do any of the occupants go on holiday? When do they start putting their heating on? When are the school holidays when the children are likely to be at home more?

Step 02:

You can start to note or draw out the type of things that happen on different days on the squares, like a calendar. You can also colour code the days, weekends, weeks and months based on what is happening using the key across the centre of the page. Add a colour to one of the blank boxes and note next to it what it represents (e.g. a holiday or 'a work away from home period'). You can do the same for any number of occupants, activites or things they or their house might experience.

Step 03:

Use the insights box at the bottom to capture anything important that comes from your explorations and discussions.

Step 04:

Once you have created an impression of 'a year in the life of', you might decide you need to focus in on a particular day (e.g. the day when the family go on holiday and then explore this further u the 'day in the life of' template

You can also refer back to the 'instructions' for more detail or to use this template effectively

P.S. Don't forget to give some



Insights:

, sing	
ו how י.	
6	

Consumer Insights Toolkit 'A year in the life of'

				Jan
				Feb
				Mar
		30		Apr
			31	May
				Jun
				Jul
		30	31	Aug
				Sep
				Oct
				Nov
				Dec



Use this template to explore the your 'hunt statement' across different months.

Step 01:

Think about which months you want to look more closely into and what kinds of things might be happening during those months. Are you interested in comparing a summer and winter month? Or a month where an occupant was working and a month when they were off? You can also note what months you are exploring and what day each box refers to (e.g. Monday) in the bars running along the top of the 'month' grids and in the boxes provided.

Step 02:

Note the type of things that happen on different days during different months on the squares. You can also colour code the days based on what type of days you think they are by using the key to the right of the page. Add a colour to one of the blank boxes and note next to it what it represents (e.g. a weekend day, or a day someone visits). You can do the same for any number of occupants, or anything that might impact on your 'hunt statement' across two months.

Step 03:

Use the insights box (bottom right) to capture anything important that comes from your explorations and discussions.

Step 04:

Once you have explored two months you might decide you need to focus in on particular days (e.g. a cold day and a warmer day) using the 'day in the life of template.

You can also refer back to the 'instructions' for more detail on how to use this template effectively.

P.S. Don't forget to give some context - note what months and years you are exploring!

					Key:
					E.g. Short break on holiday
				14	
		Month: Year:			
					Insights:
	24			28	
30		Month: Year:			

Consumer Insights Toolkit 'Two months in the life of'





Use this template to explore the your 'hunt statement' across different years.

Step 01:

Think about which years you want to look more closely into and what kinds of things might be happening during those years that are relevant to your 'hunt statement'. E.g. are you interested in comparing a year with a cold winter against one that wasn't as cold? Begin by noting what years you are exploring (below).

Step 02:

Note the type of things that happen on different days during different years on the squares. You can also colour code the days based on what is happening using the key to the right of the page. Add a colour to one of the blank boxes and note next to it what it represents (e.g. a a 2 week holiday, or when something like a boiler breaks). You can do the same for any number of occupants, or anything that might impact your 'hunt statement' across two years.

Step 03:

Use the insights box (bottom right) to capture anything important that comes from your explorations and discussions.

Step 04:

Once you have explored two years you might decide you need to focus in on particular days (e.g. a cold day and a warmer day) using the 'day in the life of' template.

You can also refer back to the 'instructions' for more detail on how to use this template and don't forget to give some context - note what years you are exploring!

	_	_						_	_		_	_							_	
1	3						14	15				21		25	26			Jan	Key:	
1	3																	Feb		E.g. 2 week holiday
1																		Mar		
1																		Apr		
1																		May		
1																		Jun		
1																		Jul		
1																		Aug		
1																		Sep		
1																		Oct		
1																		Nov		
1																		Dec		
1															26			Jan	Key:	
1																		Feb		
1																		Mar		E.g. 2 week holiday
1																		Apr		
1																		May		
1																		Jun		
1																		Jul		
1																		Aug		
1																		Sep		
1																		Oct		
1																		Nov		
1																		Dec		
								10										Dec		

Insights:

Year 1:	
Year:2	

Consumer Insights Toolkit 'Two years in the life of'



1		4 -	
Inet	ruc		ne
Inst	I U U	uо	1.5.

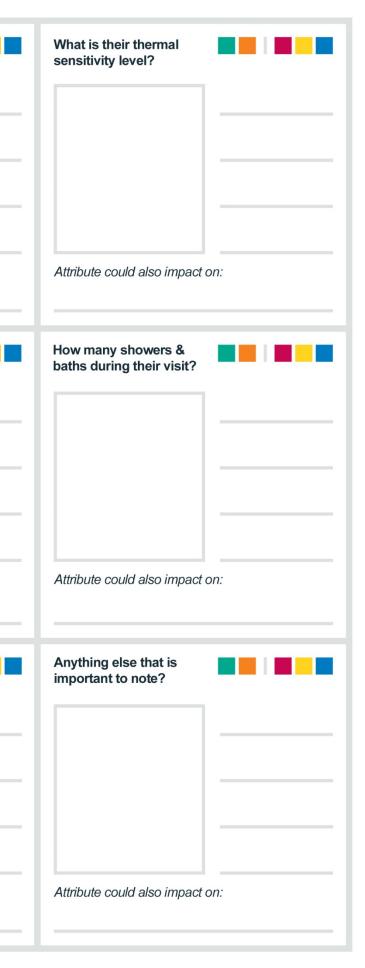
Step 01:

Start to build each visitor by adding 'visitor icons' and 'attribute icons' to each box on the right.

Who are they?

Step 02:			
/erbalise, discuss and agree on the aspects of each attribute that you hink are important, noting them down in the spaces provided. If you don't think an attribute applies to he visitor e.g. they aren't really hermally sensitive, leave the box plank.	Attribute could also impact on:		
Step 03:	Aundule could also impact on.	Attribute could also impact on:	Attribute could also impact on:
Think about and record whether you think each icon or attribute is			
avidence' or 'assumption' based - do you have evidence that the attribute is important or are you just assuming it could have impact? Circle the most relevant square in op right of each box using the key below.	What do they individually prioritise?	Are they proactive or reactive?	What relevant health concerns do they have?
Step 04:			
Think about how important each con and attribute is to the overall ssue you are interested in. Circle he most relevant square in the top ight of each box using the key below.			
Step 05:	Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:
Finally, note any links between the attributes that impact on each other at the base of each box.			
	What pets have they brought with them?	How long do they stay	Anything else that is
Attribute Evidence Key:	brought with them?		important to note?
Evidence Based			
Assumption Based			
Attribute Importance Key:			
High Importance			
Medium Importance	Attribute could also impact on:	Attribute could also impact on:	Attribute could also impact on:
Low Importance			

Are they employed?

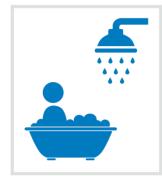


What is their qualification

level?







Number of Showers/ Baths Taken





Middle Aged Couple

Older Couple



Thermal Sensitivity: Low



Thermal Sensitivity: High



Proactive Heating 'Planner'



Reactive Heating 'Controller'



'Social Situation' 'Constraints imposed by socio-technical situation...' 'Key outcomes to think about...' 'Technical Situation'

Consumer Insights Toolkit 'Summary'

