



Report on number of consumers involved in the project

Analysis and evaluation of the
engagement process



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 957755 (SENDER). This output reflects only the author's view and the European Union cannot be held responsible for any use that may be made of the information contained therein.

Deliverable D7.1

REPORT ON NUMBER OF CONSUMERS INVOLVED IN THE PROJECT



Organisation: ECOSERVEIS

Main author: Federica Giardina

Peer reviewers: Gemma Llopis (ADEE), Matti Aro (VTT), Gottfried Köberl (WEIZ)

Date (31/10/2023)

DELIVERABLE 7.1 – VERSION 1

WORK PACKAGE N° 7

Nature of the deliverable		
R	Document, report (excluding the periodic and final reports)	X
DEM	Demonstrator, pilot, prototype, plan designs	
DEC	Websites, patents filing, press & media actions, videos, etc.	
OTHER	Software, technical diagram, etc.	

Dissemination Level		
PU	Public, fully open, e.g. web	X
CO	Confidential, restricted under conditions set out in Model Grant Agreement	
CI	Classified, information as referred to in Commission Decision 2001/844/EC	

Quality procedure			
Date	Version	Reviewers	Comments
20.10.2023	0.2	Matti Aro VTT Gemma Llopis ADEE Gottfried Köberl WEIZ	Peer-review process
26.10.2023	1.0	TMT members	Final validation

Acknowledgements

This report is part of the deliverables from the project “SENDER” which has received funding from the European Union’s Horizon 2020 research and innovation program under grant agreement No 957755.

More information on the project can be found at <https://www.sender-h2020.eu>.

Executive summary

This deliverable presents a comprehensive analysis of the efficiency and effectiveness of different engagement strategies used to engage users across three pilot sites in Spain, Austria, and Finland. The primary objective is to assess the success of each pilot site, considering metrics related to user engagement and the barriers overcome during implementation. Additionally, this report includes a

section that delves into lessons learned, offering insights for the replication of these strategies in various contexts.

The engagement strategies (workshops, social media campaigns, and events) structured into two principal campaigns: a “Raising Awareness” campaign and a “Recruitment” campaign will be analysed through a set of indicators, originally defined in *D7.2 Pilot Guide*, which serve as key metrics to assess the success rate of each pilot. By examining data from these strategies, the report highlights participation rates, engagement levels, and outcomes achieved in the different pilot areas. Furthermore, barriers encountered during the deployment of these strategies will be carefully assessed.

The report will also outline recommendations for fostering demand response, facilitating long-term persistence, and ensuring the continuation of user engagement beyond the initial campaigns.

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List of Acronyms

Acronym	Description
DR	Demand Response
EV	Electric Vehicle
HVAC	Heating, Ventilation & Air Conditioning
KPI	Key Performance Indicator
PV	Photovoltaic
UC	Use Case
WP	Work Package

1. Introduction

1.1. Objectives

This report outlines the approach and detailed activities undertaken by the three pilots (ADEE, VTT and WEIZ) in relation to customer engagement within the SENDER project.

The report seeks to provide a comprehensive insight into different ways to engage customers and illustrates the array of initiatives undertaken to involve diverse user segments. Rooted in behavioural theory which constitutes the foundation of the Report *Consumer engagement strategies guidelines* (D3.2), the report documents the specific engagement strategies designed within the SENDER project that have been employed during the demonstration phase. As a conclusion of the demonstration, this report provides a comprehensive analysis of the major outcomes of the raising awareness and recruitment campaigns to understand the user's segmentation and their behaviour towards the communication and reception of SENDER initiatives.

Each pilot considered their unique context and tailored their focus accordingly. This included understanding the specific social, economic, and environmental aspects that were particularly relevant to the pilot site. By aligning the indicators and data collection efforts with the specific context, the pilots could accurately assess the impact and outcomes within their particular setting.

To achieve the best results during the demonstration phase, it's important to secure a significant number of participants at each demonstration site. Recruitment efforts were divided among ECO and ADEE for Spain, WEIZ for Austria, and VTT for Finland. These efforts included active on-site presence, organizing specialized events and workshops, and implementing dedicated communication campaigns with the support of EQY.

The effectiveness of these strategies has been measured taking into consideration the KPIs compiled in the report *D7.2 Pilot Guide*. Furthermore, some lessons learned have been collected at the end of the document to offer valuable insights, paving the way for the replication of these strategies and the effective execution of future engagement initiatives.

1.2. Relation with other tasks of the project

This report forms a critical link between different WPs within the SENDER project. This report, D7.1, which revolves around assessing the number of consumers engaged in the SENDER project, serves as the foundation for the implementation of recruitment and engagement strategies outlined in WP3 and specifically delineated in the document *D3.2 Consumer Engagement Strategies Guidelines*. These guidelines form the strategic blueprint for the pilots, delineating a multifaceted approach encompassing three phases: recruitment, demand response, and persistence. Therefore, this report presents the results of the practical implementation of these strategies.

The link between D7.1 and D3.2 ensures alignment with the insights gained from consumer behaviour analysis in Task 5.2, *Definition of consumer patterns and tailored demand response schemes*, focusing on providing a comprehensive analysis of consumer behaviour and preferences in terms of

their willingness to adopt various energy services and products. The in-depth understanding of how consumers perceive and react to bundled offerings and the relationships between their different adoption decisions these dynamics highlighted in D5.2 *Report on segmentation and preferences of each segment*, contributes on the identification of different consumers segments, offering theoretical guidance on aligning recruitment and engagement efforts with a deeper comprehension of consumer behaviour and preferences.

Beyond this, D7.1 together with D7.3 that focuses on the technical implementation of the pilots, also lays the groundwork for WP7, particularly D7.4 and D7.5, as it helps refine strategies for monitoring and evaluating the project's impact, by following the KPIs presented in D7.2 *Pilot Guide*, ensuring a holistic approach to a project implementation consistent with the goals and objectives.

2. Methodology

The effective engagement of consumers lies at the heart of the SENDER project's objectives. This section seeks to present a detailed explanation of the methods employed to analyse the strategies deployed by the pilots, as outlined in D3.2 of Work Package 3 (WP3). The formulation of this methodology is a crucial step toward understanding the impact and success of consumer involvement initiatives within the project.

This deliverable involved a collaborative effort from the Pilot partners, each contributing valuable insights on the social segments in their country. Central to this methodology is the D3.2 *Consumer Engagement Strategies guidelines*, structured into two overarching campaigns: the awareness-raising and the recruitment campaign. The overall campaign was composed by three main steps, with the aim to:

- **raise awareness** about complex energy-related matters (such as energy prices, just energy transition, energy efficiency, etc.)
- **communicate** about the project itself
- **recruit households** in order to test the solution developed in pilot sites

Within these steps, specific strategies including social media outreach, collaboration with local multipliers, and the organization of events and workshops have been implemented. The break between the raise awareness and the recruitment stages, which was longer than what was planned, followed the preparation of the pilots and was necessary to allow for a more suitable development of pilot activities. The timeline was hence adjusted according to the pilots' needs and the peculiarities and characteristics of the context.

To holistically assess the effectiveness of each strategy, a systematic approach was adopted, involving the collection of descriptive quantitative categorical data. This data collection process was executed aligning with a predefined set of indicators designed in D7.2 *Pilots Guide*. These indicators, offer a standardized lens through which to evaluate the success rates of each pilot across varying strategies.

The fieldwork was characterized by a collaborative division of tasks and responsibilities among the pilots. This collaborative framework was facilitated by recurrent bilateral meetings arranged by ECO, with the participation of EQY, which aimed at fostering close communication, continuous follow-up, and a proactive approach to addressing potential challenges. These meetings served as platforms for tracking progress, discussing advancements, sharing experiences and ideas, and addressing any impending issues identified by the project pilots.

The design of user profiles helped to provide a complete overview of each pilot's communication capacities, networking abilities, and prior engagement activities. This also helped to delve into the multifaceted dimensions of the population of each pilot, and the potential users participating in SENDER project. This approach was strategically designed to showcase the potential of having a diverse

number of households involved, as a way to ensure inclusivity and a far-reaching impact across the community.

2.1. SENDER Engagement Strategy

The engagement strategies exposed in the D3.2 and used within SENDER project are based on studies on residential engagement in demand response (DR) programs, which are typically comprised of three critical phases: **recruitment, demand or consumer response, and persistence**. Each of the three phases represents a distinct period in the project with specific objectives to be achieved and multiple steps to be executed.

The division of engagement into temporal phases was valuable in organizing engagement strategies in a sequential manner and facilitating a better understanding of when a given strategy is appropriate and effective. Figure 1 depicts how the three engagement phases coexist throughout the entire engagement process.

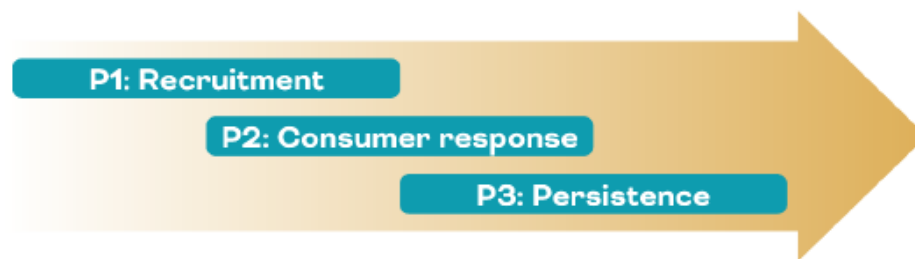


Figure 1: SENDER Engagement phase over time

Precisely, this report lays out a detailed overview of the **P1 Recruitment Phase** with all the steps and strategies, that will be elaborated in the subsequent sections, and which will be evaluated based on Key Performance Indicators (KPIs).

2.2. Engagement indicators

In order to provide a detailed overview, the procedures and techniques implemented by the pilots to gather data and calculate the defined SENDER KPI's are outlined, with the aim of providing a systematic and consistent approach to data collection and calculation processes.

The basis of this data collection process was the active involvement of each pilot partner, who played a central role in executing the recruitment process. Although the baseline for the engagement strategy is common for the three pilots, due to their context specificities, the different strategies have been implemented to target specific objectives and demographics.

Regarding the **data collection**, the key points that follow have been taken into account:

- The **sources** of data include internal databases, surveys (Registration form) and metrics of the social media platforms used.
- As for the data collection **frequency**, tracking sheets for the three engagement strategies (social

media, local multipliers, and events/workshops) have been created to allow an efficient monitoring.

- As for the data collection **process**, the pilots were in charge of the data entry procedures, tools used and respect of GDPR and consequent anonymisation. The main aim was to have a general segmentation of stakeholders depending on the particularities of each pilot, context, use cases and user profiling.

As previously mentioned, the data presented in this report is the result of a planned and executed data collection process. The list of KPIs selected for this specific task within the project, has been useful to measure the engagement strategies used by the pilot, up to the moment this document was produced, considering their limitations, and results.

Table 1: SENDER KPIs

Engagement Indicators
Number of people reached with the newsletter and other social media channels
Number or people engaged (segregated by gender, age, target group)
Times Number of registrations after the implementation of the strategy
Number of people asking for more information
Number of events held
Number of participants to the events
Number of registrations during the events
Number of posts on social media
Number of likes / retweets / mentions on communication posts (divided per the type of campaign)
New followers from the moment the campaigns started
Engagement/enrolment rate per month
Contact from potential multipliers
Number of registrations online/physical
Diversity and Inclusiveness: Number of different segments engaged (segregated by age, gender, presence of children in the household unit, neighbourhood), and their proportion over the total of engaged participants, per strategy.
Reliance on quantitative data analysis to adapt the project to the pilot's social make-up
Reliance on qualitative data analysis to adapt the project to the pilot's social make-up

Source: SENDER D7.2 Pilot Guide

The data also provided some interesting insights on the data collection and showcased the figures for every pilot. From a preliminary analysis of the collected data and referring to the SENDER KPIs list in the table above, it is important to highlight that certain indicators currently appear to be not applicable or measurable. A further and more detailed update will be provided at the project completion in the D7.6 Results and Recommendation Report, that will present the conclusions of the whole strategy. On the other hand, the specific metrics related to social media reach and user engagement will be showed in the dedicated social media campaign section, as they are directly linked to the specificities of the campaigns run by every pilot.

3. Phase 1 - Raising awareness campaign analysis

As briefly outlined in the section above, the raising awareness campaign is part of the Recruitment P1, the first phase of SENDER engagement strategy and it encompasses two main steps:

- the information campaign that comprises methods and tools (i.e., webinars, events, informative materials, workshops, assessment of DR benefits and specificities) used to present the SENDER project and what participating into it means to the potential users and how it can be used in the specific household.
- the registration of the users (with different options), as a result of the knowledge acquired during the first step and interest about the existence of the project, flexibility services and DR.

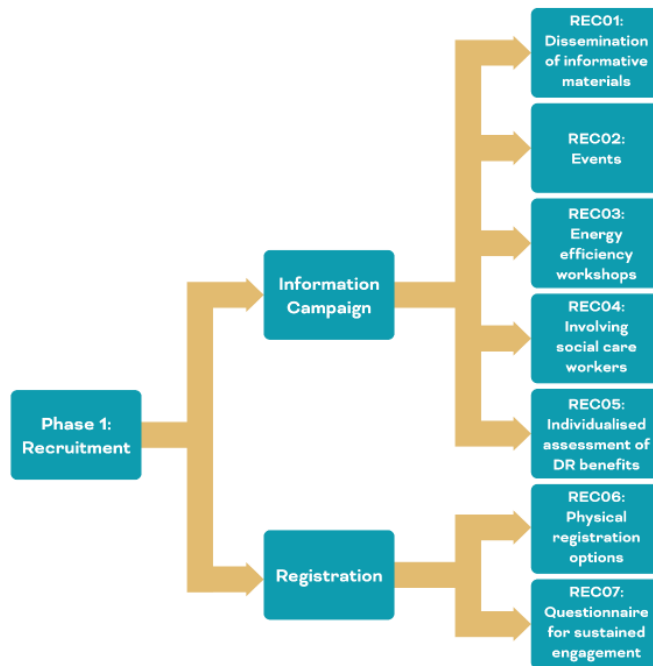


Figure 2: SENDER Phase 1 - Recruitment

The raising awareness campaign is the result of the detailed communication plan, defined as Phase 0, in which EQY together with the three pilots defined the general and specific messages to launch to the targeted audience, the channels to use (both offline and online (social media, mailing...)) and the potential multipliers. This step is fundamental to inform individuals and allow them to become prospective participants in the registration step, which is the main scope of the recruitment phase.



Figure 3: SENDER Recruitment phase scope

Three main strategies have been designed and developed by the three pilots in different ways.

- Social media campaign
- Collaboration with local multipliers
- Events & Workshops

The raising awareness campaign **began in June 2022 and finished in August 2022**, mainly through social media and in person events. During these 3 months the main aim was to raise awareness about complex energy-related matters such as energy prices, just energy transition and energy efficiency, in order to bring closer the energy topic to society. Each pilot arranged the raising awareness campaign within the given timeline, demonstrating their adaptability in tailoring strategies to their specific needs.

3.1. Strategy 1 – Social Media campaign

The social media campaign at the general level had a specific emphasis on the following aspects:

1. Simplifying and making accessible the fundamental concepts: energy, renewable energy, Demand-Response mechanisms, Smart grid, demand flexibility, and more.
2. Introducing the SENDER project, highlighting its consortium members, and showcasing the various pilot sites involved.
3. Presenting the core objectives of the SENDER project and highlighting the key stakeholders involved, such as consumers, grid operators, DSOs, and others.

This strategy was strategically tailored to reach a broad audience and employed engaging content formats (i.e., infographics for social media posts). These resources were thoughtfully crafted by EQY and ECO and translated into the languages relevant to the pilot sites. Regarding the social media coverage strategy, the main guidelines established were:

1. **Frequency:** the target was to share at least one post per week, amounting to a maximum of 6 posts during the 2 months.
2. **Channel Selection:** The chosen platforms for dissemination varied across partners and regions.

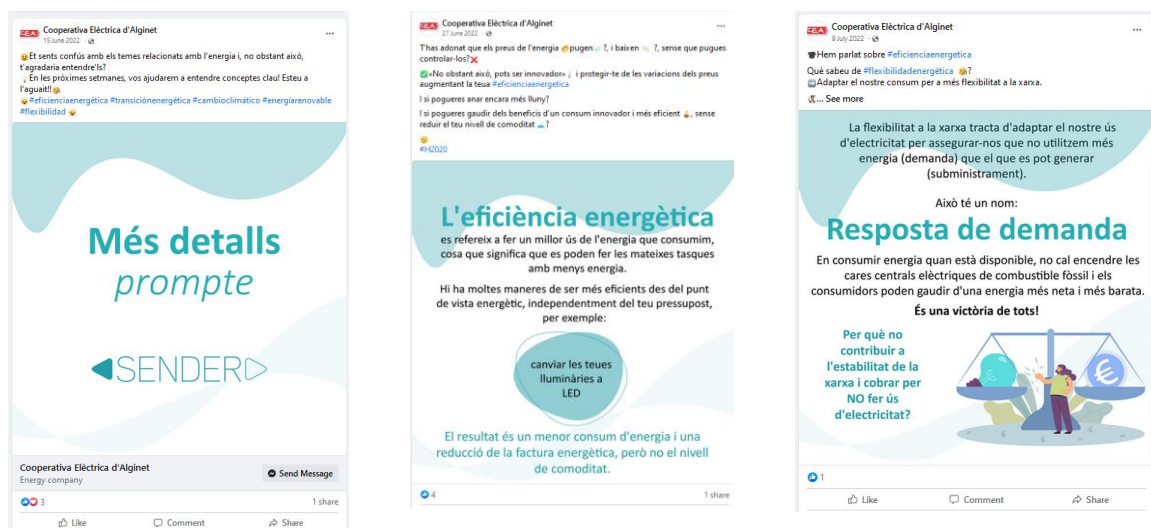
- VTT planned to use platforms such as Facebook, LinkedIn (private profiles to reach a wider audience). The initial post was created by VTT’s official account and then shared by VTT team on their personal profile.
 - ADEE intended to share content on both Facebook and LinkedIn.
 - For WEIZ, the emphasis was on Facebook, tapping into the municipality’s official Facebook account with a larger follower base especially during the last recruitment phase. The possibility of engagement from the mayor of WEIZ, who had a substantial following base, was also considered.
- 3. Maximizing channel effectiveness:** EQY provided pilots with some tips to enhance the efficiency of using these platforms for communication and outreach.
- 4. Task allocation:** The responsibilities for managing posts were divided among the consortium partners. ECO was in charge of drafting content, EQY offered communication support and formatting assistance, and the pilot sites handled translation, posting, and resharing activities.

This strategy aimed to optimize the visibility and impact of the project through consistent posting, strategic channel selection, collaborative task distribution, and tailored content translation.

3.1.1. ADEE

ADEE planned its raising awareness campaign between **June, 15 and July, 30 2022** by using the [Facebook](#) and [LinkedIn](#) profile of Cooperativa Eléctrica d’Alginet, where it has 1.130 and 62 followers respectively¹ (35% males and 65% females).

The 6 posts in *Figure 4* below, introduce the Demand Response to ADEE followers on Facebook. Since the posting on LinkedIn followed the same pattern, the post screenshots have not been included.



¹ Figures registered in August 2023.



Figure 4: ADEE’s Facebook campaign

According to the data collected by ADEE the posts shared reached 1.398 visualization in total on Facebook and originated 503 impressions on LinkedIn. *Table 2* and *Table 3* below, respectively provide a general overview about the social media campaign on both social media.

Table 2: Facebook Metrics

	P. 1	P. 2	P. 3	P. 4	P. 5	P. 6	TOTAL
Impressions	330	350	288	118	114	198	1.398
Likes	3	4	1	2	4	3	17
Times bounced	1	1	0	0	0	1	3
Interactions	15	13	3	3	5	12	51

Source: ADEE

As a general highlight, on Facebook the posts (P) with higher number of impressions were P.1 and P.2 focused on introducing the SENDER project and focusing energy efficiency. While on LinkedIn, energy sustainability (P.4) had a higher numbers of Impressions and reactions.

Table 3: LinkedIn Metrics

	P. 1	P. 2	P. 3	P. 4	P. 5	P. 6	TOTAL
Impressions	62	93	81	104	92	71	503
Reactions	4	7	3	7	4	2	27
Times bounced	1	0	0	0	1	0	2
Clicks	6	1	0	2	0	5	14

Source: ADEE

3.1.2. VTT

VTT campaign was launched on [Facebook²](#) in August 2022 with 4 sponsored posts that were active from September 15 to September 22, 2022, as it is possible to see in *Figure 5* below:



Figure 5: VTT's Facebook campaign

² VTT followers base on Facebook is around 7200.

The advertisement was strategically directed towards individuals aged 30 to 64, who displayed an interest in topics such as efficient energy use, renewable energy, ecology, environment, sustainable energy, and solar energy. This focused targeting encompassed regions including Helsinki and Espoo, Turku, Tampere, Oulu, Jyväskylä, and Lahti.

The primary objective of the advertising was to achieve an extensive coverage, ensuring a broad reach within the specified target audience. Notably, all advertisements exhibited an exceptionally low CPM (Cost Per Mille). While the number of link clicks remained modest, these clicks were not the central aim of the advertising strategy. The publication centred around Energy Efficiency garnered the highest number of clicks and achieved the widest reach. In totality, the campaign effectively reached over 113.000 users on Facebook and Instagram.

Table 4: Facebook Metrics

	P. 1	P. 2	P. 3	P. 4	TOTAL
Impressions	18.301	20.655	37.612	38.106	114.674
Reach	18.301	20.592	37.612	36.920	113.425
Likes	11	11	6	4	32
Clicks	7	0	14	5	26

Source: VTT

The figures highlight a clear and major interest of impressions on just and fair energy transition (P.3) and how to control energy consumption in the household (P.4).

3.1.3. WEIZ

WEIZ scheduled a first general information campaign between **July 7 and 18, 2022** on its [Facebook](#) profile, with 6 posts mainly focused on the project description and using specific energy key phrases, aiming at introducing Demand Response and energy transition. WEIZ has 500 followers on Facebook and 380 followers on LinkedIn, while the City of Weiz, which has supported WEIZ in its online dissemination, has a substantial following of 7,100 on Facebook³. Altogether, this resulted in a reach of approximately 7.980 followers.

³ Figures registered in August 2023.



Figure 6: WEIZ’s Facebook campaign

According to the data collected by WEIZ, the posts shared reached 1.523 visualizations (impressions and post reach) in total on Facebook, as it is showcased in Table 5.

Table 5: Facebook Metrics

	P. 1	P. 2	P. 3	P. 4	P. 5	P. 6	TOTAL
Impressions	165	276	118	106	100	95	860
Engagement	9	6	1	1	0	0	17
Post Reach	131	227	85	78	74	68	663

Source: WEIZ

These metrics, considering the followers base on Facebook, suggest a moderate success in reaching individuals, although the engagement rate seems to be low and limited to the first two posts.

3.2. Strategy 2 – Collaboration with local multipliers

Collaborating with local multipliers is the second strategic approach within the SENDER program to **build trust and enhancing engagement** and participation within the project. Multipliers, in this context, refer to trusted local actors or organizations with expertise in sustainable energy, public policy, or regulation, which are well known at the local level and engaged with civil society. Their involvement is aimed at fostering trust and encouraging participation in the SENDER initiatives.

The objectives of this strategy aimed at:

1. Identifying and mapping potential partners who could assist pilots' partners in gathering segmentation data within each pilot site. The potential multipliers were categorized as follows:
 - Local newspapers to share project-related articles and information.
 - Public administrations to leverage SENDER project reach and credibility.
 - Local entities known in the area which are committed to sustainability and energy efficiency.
 - Neighbourhood-level community centres to reach diverse segments of the population.
 - Schools as channels for disseminating project information.
2. Being supported in the dissemination of project information and in the raising awareness campaign.

To implement this strategy, the preparation of informative materials, presentations, and communication campaign were delivered. The pilots proactively contacted potential multipliers for different purposes, such as sharing dissemination materials at their venues and organizing engagement events. Among the activities that were considered to implement with the support of the multipliers there are:

- Articles for publication in newspapers that are widely read by the public or specific target groups.
- Newsletter publications, when available, to reach innovators and early adopters.
- Stand and leaflets where relevant, to disseminate information through trusted and accessible channels.

3.2.1 ADEE

Considering the collaboration multipliers, ADEE frames it within their own customer service offices and the local press contacted during the campaign, as these have been considered instrumental to promote the project during the last part of the registration process. Specifically, ADEE planned to release an article highlighting the project's October 2022 launch, accompanied by a video featuring user installations and testimonials as part of their collaboration with these multipliers.

3.2.2 VTT

As part of the local multiplier strategy, VTT established collaborations in specific regions. In the Tampere region, VTT partnered with **Ekokumppanit**, a local enterprise specializing in delivering information, counselling, training, and expert services. Ekokumppanit's initiatives are concentrated

within the Tampere area, working towards fostering both sustainable lifestyles and businesses. In the Espoo region, VTT's collaboration extended to the **Helsinki Region Environmental Services (HSY)** and their team of dedicated energy advisors.

These alliances facilitated the dissemination of information related to the SENDER project and helped to expand knowledge related to energy efficiency and sustainability, benefiting the respective regions' communities and businesses.

3.2.3 WEIZ

No activity was implemented, although WEIZ started to make some contact with local newspapers to reach out to prospective users who are not very active on social media.

3.3. Strategy 3 – Events and Workshops

The events and workshops are organized sessions aimed at engaging and informing participants about the project, its objectives, and related topics. These events provide opportunities for face-to-face interaction, knowledge sharing, and discussions among project stakeholders, participants, and the local community. They often include presentations, demonstrations, and hands-on activities designed to enhance understanding and encourage active participation in the project's activities and goals.

3.3.1. ADEE

From September 16 to 17, 2022, ADEE played an active role in the **9th Fira SOC**, a vibrant local fair organized by the city council involving the local industry and commerce. This two-day event brought together 23 local organizations, creating a dynamic platform for engagement.



Figure 7: ADEE participation at SOC Fair Event

The attendees immersed themselves in a diverse array of experiences, with over 30 stands showcasing products, initiatives, food, and providing entertainment activities. Amidst this lively atmosphere, ADEE, seized the opportunity to introduce the innovative SENDER project, among other EU initiatives, to the people visiting the event.

Throughout the weekend, visitors explored an array of stands, participated in enriching workshops, and delighted in cultural performances. Among the 5000 visitors in attendance, **15 individuals** displayed a keen interest in the SENDER project's video and offerings, as highlighted in *Figure 7*.

To expand the event's reach and inform the Alginet community about ADEE participation in the event, the picture was shared on the Facebook profile, reaching quite positive results and impressions considering the still small community Alginet has on this social media platform.

3.3.2. VTT

On October 25, 2022 the SENDER project was presented by Matti Aro during the ['Housing Association Energy Experts'](#) course.

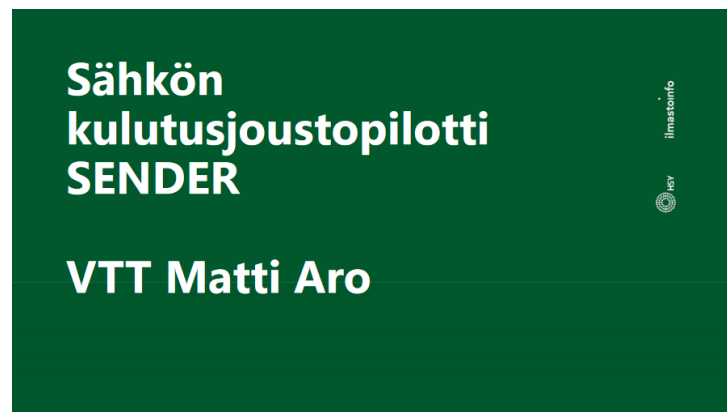


Figure 8: VTT participation at the course

This event organized by Ekokumppanit and HSY, offered a platform for showcasing SENDER's initiative focusing on the Finnish pilot. By integrating SENDER into this educational framework, VTT aimed to empower housing association energy experts with the insights and knowledge to contribute to sustainable energy practices.

3.3.3. WEIZ

WEIZ held an information evening on November 17, 2021, introducing the SENDER project and its primary goals. Although this event disseminated project information since the very beginning, it falls under a different timeline. Hence, it is not formally considered part of the project's awareness campaign.

3.4. Main highlights/barriers

From the analysis of the three pilot’s actions the following highlights and barriers can be retrieved:

Social Media Campaign

- The pilots’ campaigns were effective in reaching their target audiences and sparking **interactions** (considering the general number of visualizations, impressions, likes, reactions, and engagement). The specific figures that follow: WEIZ’s 6 posts over 3 weeks with a reach of 50-150 interactions on Facebook, ADEE’s 4 posts with 250-100 views per post, VTT’s 1 post with paid ad with 76,145 views, reaching 25,875 unique individuals, demonstrate that the content resonated with the followers. The varied posts, including project introductions and energy-related topics, contributed to a well-rounded campaign. Additionally, on platforms like LinkedIn, where engagement tends to be lower, ADEE still managed to garner interactions from regular users, highlighting the campaign’s impact.
- It is notable that the **second post** (depicted in *Figure 9*) has gathered substantial interest and the highest number of impressions across both the Spanish and Austrian pilot areas. This observation leads to speculation that the visual emphasis on the term “energy efficiency” might have contributed to its heightened engagement.

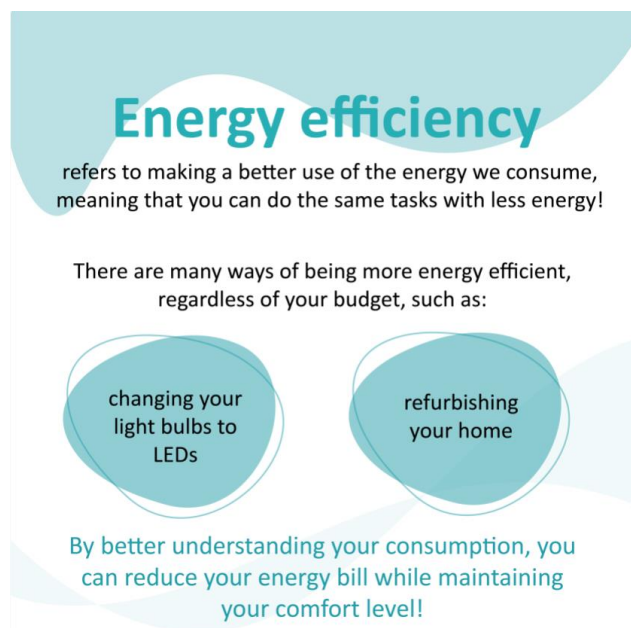


Figure 9: Energy efficiency post

- The resonance of this post can be attributed to several key factors. It addresses the prevalent concern of **optimizing energy usage** for both financial savings and environmental preservation. Moreover, it offers **tangible benefits**, including cost savings, reduced carbon footprint, and the promotion of sustainable practices. Furthermore, it actively fosters direct engagement and endorsement while **empowering consumers** to align their choices with

- personal values, leading to well-informed decisions and positive transformations. Notably, these facets appear to align effectively with the user typologies observed in both pilot areas.
- Further insights, such as the **demographic breakdown** and **age range** of the engaged users, would offer a deeper understanding of the campaign's reach.
 - o While ADEE provided **gender distribution** (35% males, 65% females) within the pool of followers of both social media platforms, more detailed demographic information about age groups and other characteristics is missing. Understanding the social substratum following news and pages could provide insights into how to reach higher engagement rates.
 - o Regarding VTT, the gendered engagement metrics indicate that out of the 10 likes, 6 were from females, 3 from males, and 1 from a social entity. However, it is important to note that these gender figures are **not necessarily representative of all interactions**, as segregated data about other engagement metrics on Facebook is not available.
 - o WEIZ campaign, while effective in reaching a wide audience, seemed to have relatively **lower engagement**, as indicated by the engagement metrics. Exploring the reasons behind this lower interaction could help optimize future strategies.

As per the **local multiplier strategy**, the efforts done by VTT in looking for partnerships showcases its dedication to leverage local expertise resulting in a higher engagement in the area, meanwhile seeking to expand the footprint outside of the local area. Within the perspective of possible SENDER replication activities, the collaboration with the Helsinki Region Environmental Services (HSY) and Ekokumppanit serves as a channel to disseminate knowledge about energy efficiency and innovation in the country. VTT's strategy exemplifies the efforts to create synergy between research institutions and local entities. ADEE decided to use its internal resources to take advantage of its own specific structure to engage potential users. In contrast, WEIZ, although making initial contacts with local newspapers, putting the base for a collaboration during the registration phase, did not implement any specific activity.

Concerning the **events and workshops** organization, ADEE's strategy exemplifies active engagement within the local community. The participation in the local fair stands out as a dynamic opportunity to connect with the audience. The keen interest displayed by 15 families reflects the success of ADEE's engagement efforts. VTT's approach to events and workshops casts light on the commitment to disseminating and fostering capacity building in a collaborative manner, aligning with the common pattern showcased in the multiplier strategy. In contrast, while ADEE and VTT actively engaged in in-person events, the strategy adopted by WEIZ seems to go through contextual constraints, as highlighted by the absence of in-person events. The lack of activities could be attributed to strategic decisions or external factors like the absence of events related to SENDER project main objectives and domain of expertise.

A notable effort was made by VTT during the raising awareness campaign launching an initial survey, which concluding question invited respondents to leave their email addresses if they were interested in participating in the pilot the following year. 18 individuals (comprising 14 men and 4

women) opted to share their email addresses. Subsequently, when registrations opened the following year, VTT directly contacted these respondents, resulting in 12 of them successfully registering for participation. This strategy significantly contributed to participant recruitment.

As a result, some **recommendations** can be drawn:

1. Visually engaging content (like images and infographics) on trending topics in the country, can boost audience engagement.
2. Campaign messaging that highlights tangible benefits, such as cost savings and environmental impact, resonated well with audiences. Emphasizing these benefits in the communication strategy helps attracting people's attention.
3. Finding support from local organizations and entities with shared interests and actively working in the same topic area can expand the project reach and raise awareness in a more efficient way.
4. Beyond social media metrics, there are no specific ways to measure the success of these strategies, following the KPIs. Collecting and gathering more detailed socio-demographic data offers a comprehensive understanding of their audience and possible engagement levels and formats.
5. To make a more precise assessment, it's important to know the baseline engagement levels before the campaign on social media and whether these figures represent an improvement.
6. In cases of lower engagement, investigating the reasons behind this and seeking ways to improve interaction in future strategies is fundamental. In this sense, regular assessments of the deployment of engagement strategies and monitoring of the activities and the participants involved would help understanding which strategy fits best.

Lastly, it is important to emphasize that during the rising awareness campaign, although there was active interest shown by individuals who either registered or expressed interest, the active registration process began at the recruitment stage.

4. Phase 2 - Recruitment campaign analysis

As previously stated, the SENDER engagement strategy, as designed in D3.2, comprises three fundamental phases that are critical to the success of the project: recruitment (P1), consumer response (P2), and persistence (P3). Each of the three steps represents a delimited period with specific objectives to be achieved. The first phase of the engagement, that is to say the recruitment, encompasses all stages from when a potential user first encounters information related to the SENDER project until their registration.

The campaign was done following different steps: from the definition of a strong communication plan, followed by the identification of key multipliers through the information campaign. Finally, a tailored registration process for individuals who had the needed requirements to participate in the pilot concluded the recruitment.

Every pilot implemented a different strategy for the recruitment process and approached prospective users in a different way. The recruitment campaign officially foreseen to begin in **November 2022** with a specific timeline and plan was implemented from December 2022. As a first and common step, a registration form was created, taking into consideration some technical aspects of the interested households, to allow having an idea of the type of households that were registering. The registration form was translated to the local language of each pilot region and was managed by each pilot partner.

A key highlight of the pilots' activities in 2023 was the splitting of the recruitment campaign into two phases. The first phase extended until May, while the second phase ran from the end of August to the end of September 2023. This decision was driven by several factors. One was the beta test, which required a specific timeline and special dedication to fulfil the household assessment requirements. Additionally, the low responsiveness of individuals during the summer break suggested that a higher level of engagement could be achieved by launching the campaign immediately after the summer period.

4.1. Strategy 1 – Social media campaign

The pilot's efforts in the social media campaign were primarily centred around a single post (with the exception of WEIZ, which used 4 posts). Each post had a distinct focus tailored to the pilot's objectives. ADEE's post primarily highlighted the registration process for the SENDER program. In the case of VTT, their post emphasized the concept of energy efficiency, showcasing how saving energy equates to saving money and the planet. WEIZ, on the other hand, leveraged all the communication materials prepared by EQY to generate maximum interest, spreading their campaign across approximately ten days. In general terms, all the pilots made a last effort in posting on social media, at the end of September 2023, aiming at encouraging late registrations to reach the latest participants.

4.1.1 ADEE

The recruitment campaign was launched on **December 22, 2022**, to inform users about the launch of the SENDER page in Catalan and the opening of the registration. It comprised one publication on Facebook and LinkedIn (*Figure 10*).



Figure 10: ADEE’s recruitment campaign

As it is possible to see from the metrics the publication on Facebook reached a higher number of interactions in total.

Table 6: Facebook & LinkedIn Metrics

Social Media	Seen by	Reactions	Times Bounced	Interactions
Facebook	138	4	4	10
LinkedIn	69	4	0	2

Source: ADEE

This was also supported by a mailing out through *mailchimp* to 65 users who expressed the interest in the SENDER project. The email was opened by 48 people and 16 of them landed on the SENDER Catalan page. The result of this campaign is that **4 people registered**.

On January 9, 2023, a second dissemination mail (*mailchimp*) send out was scheduled. The aim was to open the target to all ADEE audience and remind them there are still available places with the slogan “*Registration now open! Reminder after Christmas holidays*”. The email was sent to 2.400 people, and it was opened by almost 50% of them. Specifically, 88 people clicked on the landing page, 29 on the registration form, 5 unsubscribed and 12 bounced the email.

As result of this campaign, 7 users asked for more information about the SENDER box and the whole installation process (3 through phone call and 4 in on site visits). Finally, **20 people registered** trough the online form. These figures cast light on the impact emails have on the final users and it seems to be the strongest channel in the Spanish pilot.

4.1.2 VTT

VTT arranged its communication campaign through social media in two periods. The first was a 2-months recruitment campaign on [Facebook](#) (**January, 11 to February, 28 2023**) with one paid ad targeting Espoo and Tampere Region. The aim of this campaign wat to highlight who could participate, the main benefits and requirements for participation and how to take part to the project (with the link to the registration form).

The post (*Figure 11*) had 76.145 views and reached 25.875 (unique) people, 289 clicks to SENDER website, 10 likes (7 females, 3 males) and it was shared 3 times.

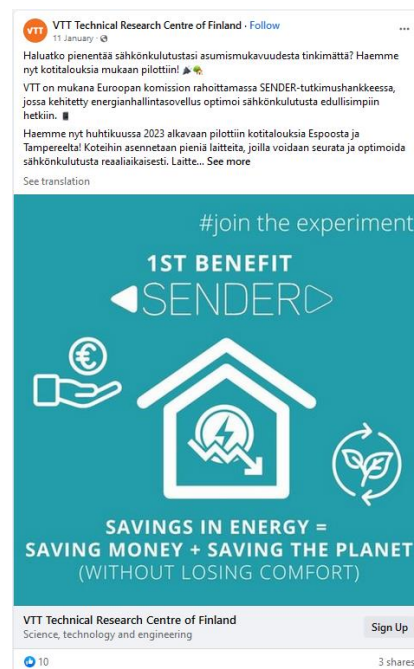


Figure 11: VTT’s 1st recruitment campaign

The second post (Figure 12) about energy consumption was launched in August 2023 on three different social media platform. Below some statistics about the reach out:



Figure 12: VTT's 2nd recruitment campaign

On Twitter/X the post reached out to 965 individuals receiving our messages. While the campaign garnered only 2 likes and 2 reshares, it did generate 10 clicks, suggesting that the content piqued the curiosity of a subset of our audience.

On LinkedIn the post had an impressive reach of 9.909 individuals. The engagement on this platform was notably higher, with 89 likes, 135 clicks, and 16 reshares, demonstrating that the content resonated well within the professional users of LinkedIn. These figures are also due to the post resharing made by VTT professionals on their personal LinkedIn profile that undoubtedly helped to reach a wider audience.

Finally, on Facebook, VTT connected with 1.556 individuals, accumulating 16 likes, 41 clicks, and 6 reshares.

Table 7: Social Media Metrics

	Twitter	LinkedIn	Facebook	TOTAL
Post Reach	965	9.909	1.556	12.430
Post likes	2	89	16	107
Post clicks	10	135	41	186
Times shared	2	16	6	24

Source: VTT

4.1.3 WEIZ

WEIZ recruitment campaign was led between **January 12, 2023, and February 8, 2023**, mainly on Facebook. The aim was to provide detailed information about SENDER project, a more in-depth description of pilot site actions and possible benefits for participation. WEIZ managed to have a preliminary interest through 4 posts showed in the picture below:



Figure 13: WEIZ's recruitment campaign

According to the data collected by WEIZ the posts shared reached 3.630 visualizations in total on Facebook, while a general overview is showcased in *Table 8*.

Table 8: Facebook Metrics

	P. 1	P. 2	P. 3	P. 4	TOTAL
Impressions	3.695	200	301	433	4.629
Engagement	375	20	29	17	441
Post Reach	2.933	161	228	308	3.630
Post likes	5	9	3	5	22
Times shared	9	2	0	1	12

Source: WEIZ

At the end of the recruitment phase, the possibility of engagement with the department of Marketing and the Public Relation office of the city council, who had a substantial followers base, was also considered.

4.2. Strategy 2 – Collaboration with local multipliers

The second engagement strategy used by SENDER pilots focused on using **local multipliers** which involved leveraging the interconnectedness of the local community ecosystem to foster collaboration, and support in informing and recruiting citizens to participate into the project. The three Pilots have used different channels to boost interest and participation mostly related to the already built relationships and partners’ network.

During the months of August and September 2022 with the aim of communicating and informing about the project itself, the pilots contacted possible multipliers in their area.

4.2.1. ADEE

ADEE’s collaboration with local multipliers for the recruitment campaign involved various initiatives as mentioned in the previous chapter, that were deployed in parallel along the month of September 2023.

- The different customer offices were activated to reach potential participants. Since they typically serve around 20 in-person visitors daily, this was considered as a useful channel to achieve a higher number of individuals registered.
- ADEE reinforced its partnership with a local newspaper, **La Veu d’Alginet**, aiming expand the project’s reach. Collaborating with them allowed for wider dissemination of project information among the local community. The collaboration was based on the publication of the SENDER News video on different social media platforms, including Facebook, Instagram, and their website. The video (*Figure 14*) aimed to raise awareness and engagement among the target audience in the local community.

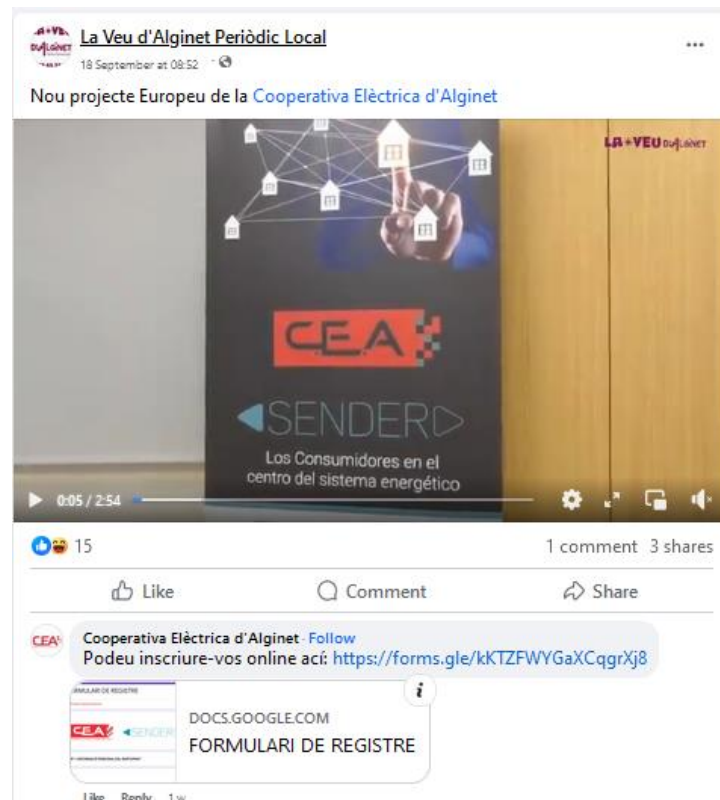


Figure 14: ADEE collaboration with La Veu d'Alginet

Overall, ADEE's collaboration with local multipliers, including its customer office and the local news organization, was a significant and high-impact effort to promote the SENDER project during the recruitment campaign.

4.2.2. VTT

VTT identified key multipliers, including housing companies, distribution system operators (DSOs), energy companies, and municipalities, as pivotal partners in amplifying the dissemination campaign's reach and impact within the Finnish pilot.

VTT partnered with HSY, the Espoo region energy council, to enhance the outreach efforts through the newsletter "Energy council for housing companies". The statistics for this newsletter campaign are as follows:

- Recipients 768 individuals
- Opened by 434 recipients
- Total opens 903 times
- The SENDER hyperlink opened 16 times, demonstrating a degree of interest generated by the campaign within this group.

HSY also shared a VTT post on Facebook within a closed networking group about climate topics. The results for this collaboration are as follow:

- Recipients: 113 members of the group
- Opened: 8 times, indicating some engagement within this specific group.

On the other hand, VTT was supported also by Neuvoo.fi, that works under Ekokumppani, which reshared VTT original posts on Facebook to extend the raising awareness campaign's visibility to reach a wider audience and create additional engagement.

A local communication campaign was deployed by distributing 800 flyers (Figure 15) in targeted areas of Tampere and Espoo in which a higher number of profiled individuals could be recruited.



Figure 15: VTT's flyers adaptation

These flyers were strategically placed in household mailboxes, libraries, and office coffee rooms. This concerted effort yielded **28 registrations**. While this may appear relatively modest, especially when juxtaposed with the scale of flyers distribution, it's essential to acknowledge that during the initial stages, this approach yielded the highest percentage of registrations. This approach was originally conceived with the idea of engaging neighbours and households close to VTT target area to facilitate the installation process.

VTT strategically emphasized the impact of electricity price fluctuations and the growing public concern surrounding potential consequences. The central message conveyed was that by planning their heating more efficiently, individuals could reap significant advantages. This approach aimed to

elucidate the rationale behind adopting Demand Response (DR) and altering electricity consumption habits, emphasizing the benefits for both individual consumers and the broader community.

In terms of profiling, the target audience comprised individuals interested in upgrading their homes, presenting a new avenue of opportunity.

4.2.3. WEIZ

As for the multiplier strategy, WEIZ preferred using a local newspaper coverage, with a publication of an article on *Kleine Zeitung* on February 12, 2023, at showed in *Figure 16*.



Figure 16: WEIZ’s Newspaper publication

This publication as mentioned by WEIZ and as the following figures show was a turning point in the online recruitment campaign, that in Austria did not give the expected results. As a result, this publication triggered a higher number of registrations. As WEIZ reported, after reading the article 62 new households showed interest and registered.

4.3. Strategy 3 – Events & workshops

In this phase, the pilots promoted participation in other sessions such as webinars or onsite informative sessions for registered users, focusing on best practices on energy consumption.

4.3.1 ADEE

ADEE’s approach to recruitment and engagement activities was focused on in-person events and workshops.

On Friday, March 24, 2023, ADEE hosted to the event Energy Community Journey, centred around local energy communities with best practices represented by the pioneering Alget Energy Community.



Figure 17: ADEE’s event

The event counted with the participation of local authorities, President of ADEE, Unión Renovables, Housing Europa, Aeioluz, the Energy community of Catarroja, ADEE Horizon2020 projects

representative. The aim of the event was to talk about energy communities and to present the energy community of Alginet to residents, other energy communities, and the federation of electrical cooperatives of the Region of Valencia.

The SENDER project was presented along with other EU projects in the innovation section of the day, specifically focusing on Demand Response, Flexibility representing a leap forward in energy innovation, aiming to change the way we perceive energy consumption and sharing. 60 individuals attended the event. ADEE team had the opportunity to engage with a significant portion of the attendees. Approximately 10 individuals showed interest about the SENDER project and the equipment and approached ADEE team to discuss the project.

In terms of statistics, 42 out of the 60 participants went a step further by expressing their interest in staying connected with the project. They willingly opted to join the ADEE’s mailing list, demonstrating their enthusiasm to receive additional information and updates about SENDER. When considering the demographic breakdown of the participants, the gender distribution was as follows: 42 men and 20 women, mainly covering the age range from 40 to 65 years old.

The event was sponsored by CEA on LinkedIn (*Figure 18*) to attract professionals of the industry and receiving quite high interest considering the still restricted number of followers.



Figure 18: ADEE’s events on Facebook

4.3.2 VTT

As far as events and workshops are concerned, VTT has been participating in the following events:

- VTT participated of **February 9, 2023** with Fingrid to the online webinar *“Real Estate Management Info about Demand Response”*, organised by the Helsinki Region Environmental Services HSY for real estate managers, as part of their energy efficiency “training” the main topics were the Demand Response and its potential to real estate management.

SENDER project was presented and attendees (mostly 55–65-year-old males, not very familiar with just energy awareness) were invited to register. The main questions arising were on the installation, troubleshooting and further developments after the end of the project and the easiness of control of the SENDER box. Only **one person** out of 50 participants registered to SENDER.

- VTT organised a remote info session *“SENDER Info for registered households”* on **February 22, 2023**, on the specific status of SENDER project, using the user journey in *Figure 19* and directed to registered users. The User Journey, presented also during the session, served a dual purpose, functioning not only for the recruitment strategy but also as material for the engagement strategy. It was disseminated to individuals who had previously registered to facilitate their comprehension of the forthcoming participation process.



Figure 19: SENDER User Journey

Furthermore, the development of the material, proved to be important for pilots’ partners, as it enabled them to gain insight into, and articulate in a straightforward manner, the steps involved in the participation process for the households involved. Notably, the SENDER User Journey

material was elaborated collaboratively among the three pilots and was made available in all three local languages with the support of ECOSERVEIS and designed by EUROQUALITY. The aim for the Finnish pilot was to explain the concept, the next steps, and disclaimers to the 12 participants involved (50 % females, 50 % males). To disseminate the information, the webinar was shared on YouTube, reaching 96 views. The online session was primarily intended for already registered participants who couldn't attend the live session. This video (Figure 20) wasn't directly employed as a recruitment tool but rather to engage registered participants. This effort aimed to provide support and information, especially considering the project's initial timeline projections, which had informed participants that the installation process would commence in January.

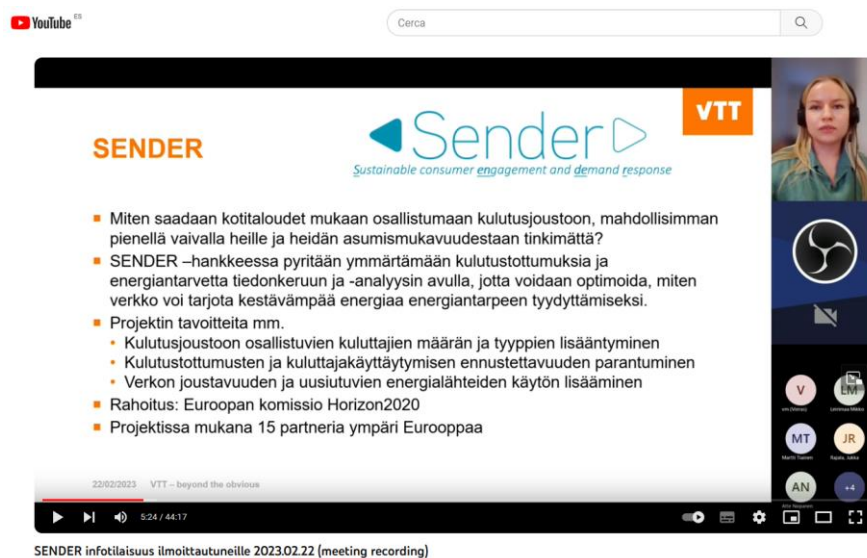


Figure 20: VTT's remote session

4.3.3 WEIZ

WEIZ has planned to host an online workshop when roughly half of the installations are completed. Given the existing technical implementation schedule for installation and commissioning, this workshop will align with activities foreseen in P2.

4.4. Highlights and barriers

As a general highlight, the recruitment strategies adopted by each pilot aligned with the objectives of the raising awareness campaign, which emphasized engagement through social media, collaboration with local multipliers, and event planning. Each pilot made strategic decisions based on the outcomes observed in the awareness-raising campaign, selecting the approach that best matched their objectives.

As a result, VTT primarily concentrated on multipliers' support through a newsletter, ADEE opted for participation in local social events, and WEIZ chose to publish an article in another local newspaper, with the support of the mayor. These tailored approaches allowed each pilot to leverage their strengths and resources effectively.

ADEE's email campaigns proved to be a strong channel for reaching potential participants.

- The first **mailchimp send out** reached, during the first round 48 people, leading to 16 landing on the SENDER Catalan page and 4 registrations. Whilst the second email campaign sent to 2.400 people reached almost 50% of the recipients, garnering significant engagement with 88 clicks to the landing page and 29 clicks on the registration form. It resulted in 7 inquiries and 20 registrations. The personalized approach of emails seems to have encouraged users to seek further details. The 24 registered users indicate a significant level of interest and engagement and hence qualify the mailing list as a good channel for the recruitment.
- As for the engagement with **local multipliers**, ADEE used customer offices and a local newspaper (La Veü d'Alginet), significantly contributed to project promotion during the recruitment campaign. Activating its customer offices, serving around 20 in-person visitors daily, proved to be a useful channel for reaching potential participants. While the video publication made by La Veü d'Alginet expanded the SENDER reach in the local community.
- Concerning the **events and workshops strategy**, ADEE prioritized in-person events and workshops, as the Energy Community Journey event, that attracted 60 participants and featured discussions about local energy communities, including the Alginet Energy Community. Approximately 10 attendees showed interest in the SENDER project and equipment during the event. Moreover, 42 out of 60 participants expressed interest in staying connected with the project by joining ADEE's mailing list.

VTT social media campaign seemed the more effective channel in engaging individuals

- The social media campaign conducted by **VTT**, which involved paid advertisement, exhibited distinct characteristics and insights compared to the campaigns of ADEE and WEIZ. Some aspects that are interesting to consider: the first VTT campaign with paid promotion achieved an impressive 76.145 views and reached 25.875 unique individuals, meaning a higher visibility if compared with ADEE and WEIZ. The campaign led to 289 clicks to the SENDER website, indicating a stronger interest from almost 10% of users. The higher number of likes (10) compared to ADEE's and WEIZ's campaigns suggests that the paid promotion was effective in capturing attention and showing positive reactions, although the post was shared only 3 times. VTT's second post had significant attention, particularly on LinkedIn, where it reached 9,909 individuals with 89 likes, 135 clicks, and 16 reshares. This platform's professional user base proved receptive to the content, highlighting the effectiveness of LinkedIn in reaching a targeted audience.
- **As for the collaboration of local multipliers**, VTT recognized the importance of engaging key multipliers such as housing companies, DSOs, energy companies, and municipalities. Partnering with HSY, the Espoo region energy council, through their newsletter "Energy council for housing companies" was a successful strategy. This newsletter campaign reached 768 individuals, with 16 clicking on the SENDER hyperlink, showcasing genuine interest. On the other hand, Neuvoo.fi's resharing of VTT's posts on Facebook expanded the project's visibility, creating additional engagement. Finally, distributing 800 flyers in targeted areas generated 28

registrations, a noteworthy achievement given the focused approach to reach profiled individuals.

- Finally, regarding the **events**, the "Real Estate Management Info about Demand Response" webinar and the "SENDER Info for registered households" session allowed for direct engagement with potential participants, clarifying doubts and addressing concerns of already registered households.

WEIZ recruitment campaign encompassed a comprehensive strategy spanning various platforms, such as Facebook, the official WEIZ homepage, and the city newsletter

- **WEIZ's** campaign on Facebook generated substantial interest with 3,630 visualizations and 441 engagements. This suggests that their posts resonated well with their audience and sparked interactions.
- WEIZ's decision to use a **local newspaper**, Kleine Zeitung, for publication on February 12, 2023, had a noticeable impact. This strategic move led to a substantial increase in registrations, with 62 new households expressing interest and registering.
- Regrettably, despite the efforts invested, the outcomes of these campaigns were not in line with the expected outcomes and hence these campaigns did not yield the desired results. On the other hand, the turning point in WEIZ recruitment was the publication of a newspaper article, which emerged as a significant catalyst. This article, along with the initial sign-ups gathered from the co-creation workshops and word-of-mouth recommendations, presented a contrasting scenario. These early successes hinted at the possibility that the campaign's impact may not have been as pronounced as initially envisaged.

These insights highlight the importance of adaptability in engagement strategies and the potential of diverse channels to reach a wide and varied audience effectively. The summary table (9) below showcases the different figures achieved in every pilot in both the raising awareness and recruitment phases to fulfil the different KPIs.

Summary table

Table 9: KPIs and Pilots metrics

Indicators	ADEE	VTT	WEIZ
Number of people reached with the newsletter and other social media channels	<p>2108 (Fb & LinkedIn) <i>64 Likes/interactions</i> <i>9 Times bounced</i> <i>16 Clicks</i></p> <p>1645 (Mailchimp) <i>15 reactions</i> <i>3 Shared</i></p>	<p>151.730 (Fb & LinkedIn) <i>335 Likes/interactions</i> <i>50 Clicks</i></p>	<p>4293 (Fb) <i>22 Likes/Interactions</i> <i>29 Clicks/shared</i></p>
Number or people engaged (segregated by gender, age, target group) ⁴	<p>4679 <i>People between 60 and 64 years old (70% men and 30% women)</i></p>	<p>~150.000 <i>Mostly on social media + 903 multipliers (Fb closed group 62 (event, 50%-50% males females)</i></p>	<p>520</p>
Number of registrations after the implementation of the strategy	<p>51 <i>(24 mailchimp)</i></p>	<p>140 <i>(26 through Fb & LinkedIn, 28 from the flyers campaign, mouth to mouth)</i></p>	<p>123 <i>(43 through fb, events, city newsletter; 62 after publishing the article in the local</i></p>

⁴ Partial data as Pilots do not always have segregated data

			<i>newspaper; 18 not assignable to any of those strategies)</i>
Number of people asking for more information	57 <i>15 (Event Fira Soc) 42 (CEA Group Event)</i>	6	3-5
Number of events held	2	3 <i>1 held, participated in 2 other events</i>	1 <i>(Short presentation in 2021)</i>
Number of participants to the events	5057	62	30
Number of registrations during the events	-	1	10
Number of posts on social media ⁵	15 <i>(12 posts raising awareness, 2 posts recruitment, 1 post multiplier)</i>	15 <i>(4 posts raising awareness, 4 posts recruitment, 7 post multiplier)</i>	10 <i>(6 posts raising awareness, 4 posts recruitment)</i>
New followers from the moment the campaigns started	<i>N/A</i>	<i>N/A</i>	<i>N/A</i>
Engagement/enrolment rate per month	6 <i>(Most registrations happened in January, and September)</i>	10 <i>(Most registrations happened in January-March, August-September)</i>	15 <i>(Although most of them happened after February, September-October)</i>
Contact from potential multipliers	<i>Yes</i>	<i>Yes</i>	<i>Yes</i>

⁵ Detailed information about posts, topics, and *number of likes/retweets mentions on communication posts* is provided in the Social Media Strategy (section 4.1 and 5.1)

Number of registrations online/physical	Physical 8/online 50	All online	Physical: 2, online: 121
Diversity and Inclusiveness: Number of different segments engaged (segregated by age, gender, presence of children in the household unit, neighbourhood), and their proportion over the total of engaged participants, per strategy.	<i>Detailed information in section 4.4.1</i>	<i>Detailed information in section 4.4.2</i>	<i>Detailed information in section 4.4.3</i>
Reliance on quantitative data analysis to adapt the project to the pilot's social make-up	<i>Detailed information in section 4.4.1</i>	<i>Detailed information in section 4.4.2</i>	<i>Detailed information in section 4.4.3</i>
Reliance on qualitative data analysis to adapt the project to the pilot's social make-up	<i>Detailed information in section 4.4.1</i>	<i>Detailed information in section 4.4.2</i>	<i>Detailed information in section 4.4.3</i>

Source: SENDER D7.2 Pilot Guide

Below an interpretation of the measurability of the KPIs is provided. Some aspects remark **obstacles and issues** detected in the data collection, that should be taken into account when considering the validity of the indicator.

1. A significant obstacle faced by the 3 pilots is the **availability of basic data** to calculate the KPIs. For instance, if data related to the number of participants in specific events is hard to collect (i.e. fairy event in ADEE, or number of newspaper readers), it can hinder the accurate calculation of the indicator.
2. Another obstacle is the **new followers'** metric marked as N/A for all three pilots. This is because the campaigns were conducted through existing corporate profiles on social media platforms, making it complex to determine the direct correlation between the campaign and the increase in followers.
3. **Tracking inquiries for additional information** presents challenges, especially when these inquiries are closely intertwined with direct registrations. For instance, VTT received emails before official registrations, demonstrating genuine interest but it is not clear which is the source they come from.
4. **Time lag and delayed deadlines** have resulted to be among the most critical factors. The delay in technical implementation, partly due to the increase in prices resulting from the Ukrainian occupation, affected recruitment. Additionally, the recruitment had to be temporarily halted in May 2023 due to the pilots' focus on the audit and installation of a first batch of enrolled households. The last step of recruitment took place between September 2023. These delays have impacted the pilots' engagement strategies timeline.
5. A **discrepancy** in the target reached has been showed. VTT has effectively reached a **significant number of people**, primarily through social media channels. In contrast, WEIZ and ADEE have reached a much smaller audience, mostly based on the followers.

4.5. Current situation of user registration

The recruitment phase stopped in May 2023 as the technical implementation of the pilots with the beta test, lasted more than expected and was resumed in August 2023. For such reason and to fulfil SENDER project deadlines, all the figures and the relative analysis is based on the data collected until **October 23, 2023**. The objective to reach and the current number of registered users is as it follows:

- 100 users registered for ADEE (Spain) – *46 missing*
- 100 users registered for VTT (Finland) – *40 exceeding*
- 200 users registered for WEIZ (Austria) – *57 missing*

This section offers a comprehensive overview of the **Diversity and Inclusiveness indicators** outlined in D7.2, which serves as a foundation for adapting the project to align with the demographics of each pilot. It primarily relies on quantitative data analysis to assess key factors like age, gender, the presence of children in the household, and neighbourhood distribution among engaged participants. However, it's worth noting that some data inconsistency exists, as certain information has not been tracked, as the neighbourhood distribution, substituted by income per month. In general, aggregated

data cannot be directly linked to a specific engagement strategy, although some general figures are provided. The subsections below provide a general socio-demographic overview about the users registered in the different pilots until September 2023. Among the socio-demographic indicators, the one that does not seem significant is the household's composition with *kids under 18*.

While VTT engaged 40% of households with children, for WEIZ and ADEE show lower percentages (around 24-26%) showing a lower diversity in terms of family composition.

This insight with those coming in the next subsections hold potential value even beyond the completion of the current project, as they can inform about the adaptation or recalibration of engagement strategies and indicators to measure the success of project with a high degree of social innovation.

4.5.1 ADEE

As per the diversity and inclusiveness indicator, ADEE actively engaged participants across various segments (i.e. age, gender, presence of children in the household). At the Barcelona Consortium Meeting, in March 2023, hence in the middle of the recruitment campaign, the general overview about the 28 users registered as for gender, age and socio-economic background was as it follows:

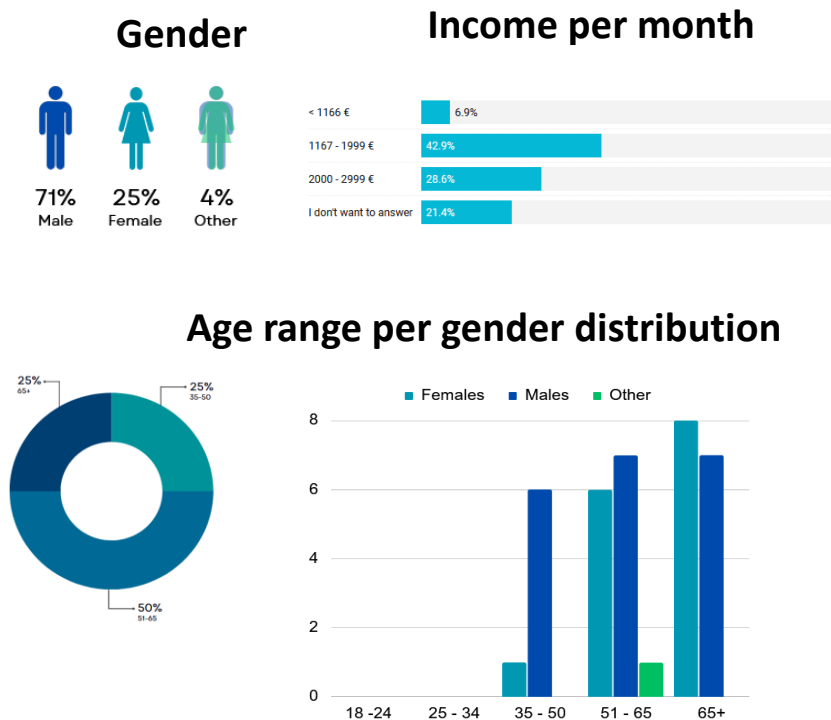


Figure 21: ADEE users registered

The metrics provided by ADEE, at the end of September 2023 showed in Table 10 summarise the socio-demographics for the 50 registered used.

Table 10: ADEE registered users metrics

September 2023	
Registrations	50 households
Gender	
Male	62,0%
Female	36,0%
Other	2,0%
Age	
18-24	0,0%
25-34	2,0%
35-50	38,0%
51-65	46,0%
65 +	16,0%
Not answered	1,4%
Income	
< 1166 €	6,0%
1167-1999 €	40,0%
2000 - 2999 €	26,0%
> 3000 €	4,0%
I don't want to answer	18,0%
Other (temporary job)	6,0%
Households with children (under 18 years old)	26,0%
Technical requirements	
Internet connection at home	100,0%
PV for self-consumption	6,0%
EV	8,0%
EV charge at home	2,0%
HVAC system	50,0%
Electric boiler	54,0%

Source: ADEE

Comparing the data until March 2023 with the current data in September 2023 reveals some notable shifts:

- Until March 2023, there was a significant **gender imbalance**, with 71% males and 25% females. In September 2023, the gender distribution has become more balanced, with 62% males and 36% females and still a 4% falling under the category “other.”
- In March 2023, the majority of participants fell into the income bracket between 1167€ and 1999€ (42.9%). In September 2023, the income distribution has slightly decreased (-3 points), still though indicating a major sample of participants with **medium income levels**.
- There is also a notable increase (**from 6.9% to 18%**) in participants who prefer not to disclose their income, potentially indicating a more diverse income range.
- In March 2023, a significant portion of participants were in the 51-65 age range (50%), with 25% in the 65+ age range. However, there were no participants in the 18-24 and 25-34 age ranges. In September 2023, the age distribution remains skewed towards older participants but with some changes.
- There is now a small representation (2%) in the 25-34 age range, and the 65+ group has decreased to 16%. While the majority still falls within the 51-65 age range (46%), the presence of one younger participant is a positive sign.
- Specifically related to the **income range within the 65+ group**, it can be quite diverse, including retirees with various pension levels. Considering the Spanish context, retirees on average may have lower incomes. Nevertheless, the data collected show that this specific age group is financially stable, owns a house, is motivated by the opportunity to adopt more eco-friendly energy consumption practices and also since they have a fixed income, saving on energy bills can be particularly attractive to them.

Overall, the data trends suggest progress in achieving a more balanced and diverse participant profile, with improvements in gender balance, income distribution, and a slight increase in younger participants. These changes may lead to more comprehensive insights and better representativeness of Alginet's target groups once reached the final number of registered users. As in the case of WEIZ, efforts should continue to be made to reach more varied audience always aligning with the technical requirements that, in ADEE, should focus on EV and PV.

4.5.2 VTT

As per the diversity and inclusiveness indicator, VTT actively engaged participants across various segments (i.e., age, gender, presence of children in the household). At the Barcelona Consortium Meeting, in March 2023, hence in the middle of the recruitment campaign, the general overview about the 76 users registered as for gender, age and socio-economic background was as showed in *Figure 22*:

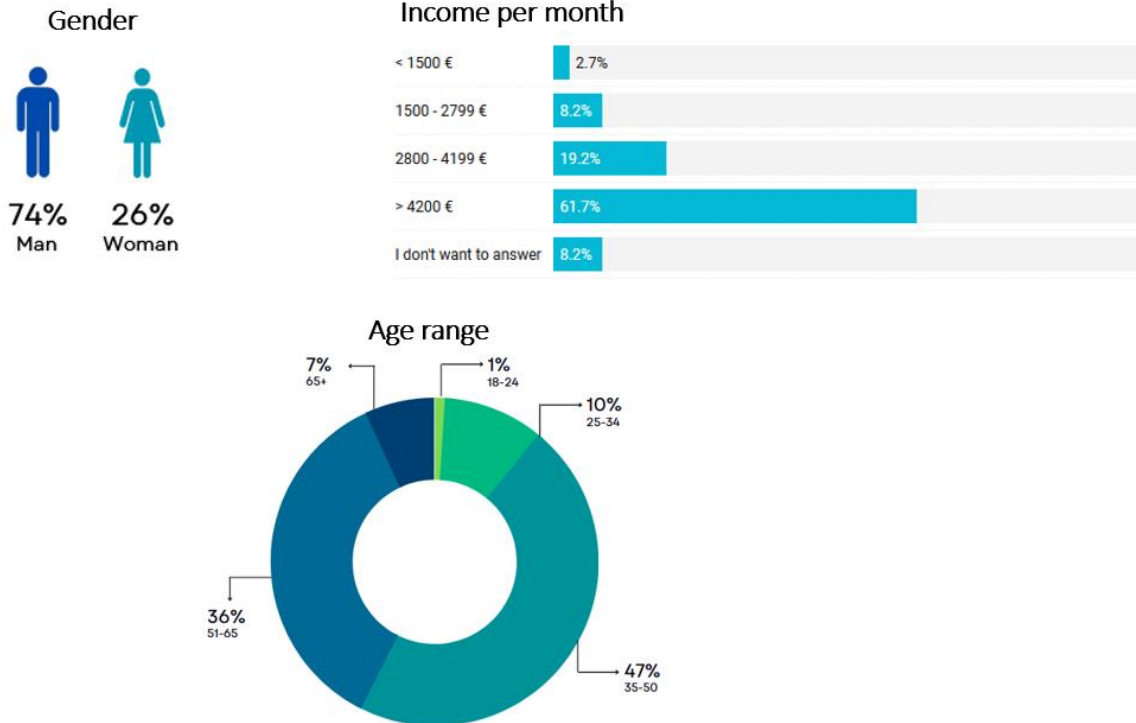


Figure 22: VTT users registered

Some corrections needed to be done in the recruitment strategy since, as it possible to see from the figure above, the sample should have a more equal gender representation, a more equal distribution in the younger age ranges (<34 yo) and a higher socio-economic inclusion.

As it is possible to sum up from data in Table 8 that shows the metrics for the 140 recruited individuals:

- The gender distribution has remained almost identical, with 74% males and 26% females, indicating a **consistent imbalance in gender representation**.
- This suggests a slight increase in the overrepresentation of higher-income participants, as in March, 61.7% of participants reported an income over 4200€, while in the current data, 63% fall into this category.
- Age distribution also demonstrates better balance. The proportion of participants aged 51-65 has decreased from 36% in March to 28% in the current data, indicating a reduction in overrepresentation within this age group. Additionally, there is a slightly higher percentage (8.6%) of participants aged 65+ in the current data compared to March (7%), which indicates a minor improvement in representing older age groups.

The imbalances in the current socio-demographics will be corrected when selecting targeted sample of 100 registered users. However, achieving a more balanced sample to ensure inclusion will also depend on a proper alignment with the technical requirements foreseen for the 4 use cases.

Table 11: VTT registered users metrics

September 2023	
Registrations	140 households
Gender	
Male	74,0%
Female	24,0%
Other	2,0%
Age	
18-24	0,0%
25-34	15,0%
35-50	47,0%
51-65	28,0%
65 +	8,6%
Not answered	1,4%
Income	
< 1500 €	2,1%
1500-2799 €	5,0%
2800 -4199 €	18,6%
> 4200 €	63,0%
I don't want to answer	9,3%
Not answered	2,0%
Households with children (under 18 years old)	54,3%
Technical requirements	
Internet connection at home	100,0%
PV for self-consumption	19,3%
EV	29,3%
EV charge at home	23,6%
HVAC system	62,3%
Electric boiler	70,5%
Electric heating	52,9%
District heating	11,1%
Oil	1,4%
Ground source heat pump	26,0%
Other	8,6%

Source: VTT

4.5.3 WEIZ

As per the **diversity and inclusiveness indicator**, WEIZ actively engaged participants across various segments (i.e., age, gender, presence of children in the household). At the Barcelona Consortium Meeting, in March 2023, hence in the middle of the recruitment campaign, the general overview about the 121 users registered as for gender, age and socio-economic background was as it follows:

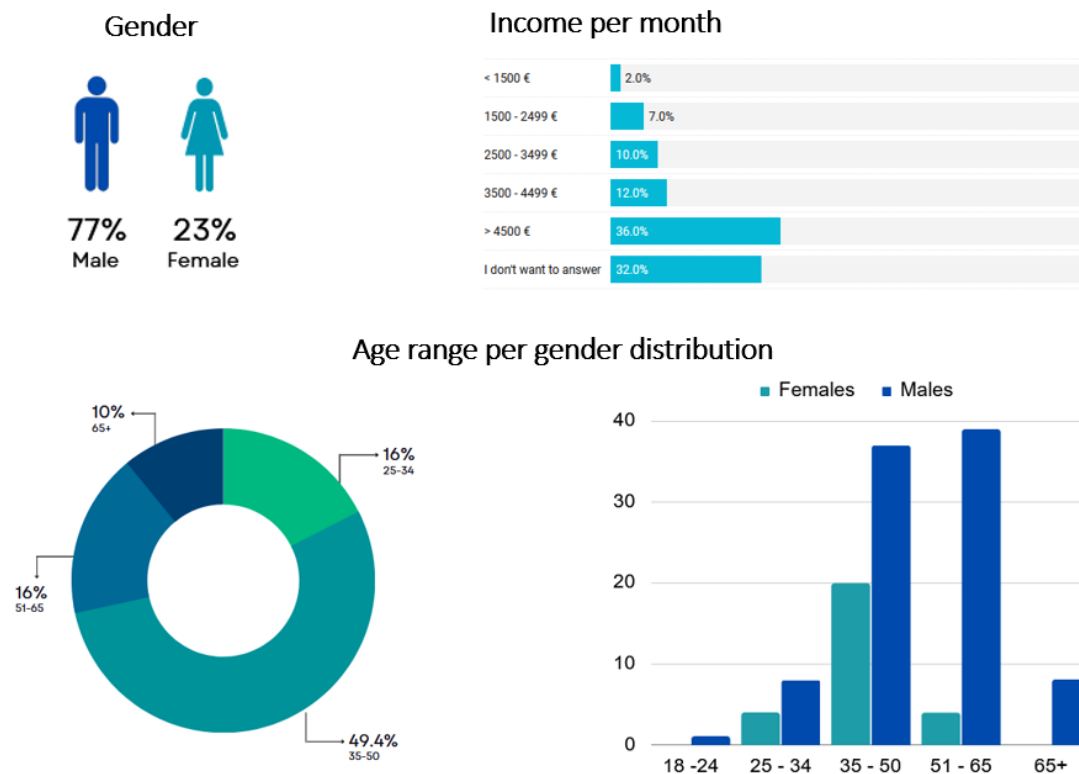


Figure 23: WEIZ users registered

Specifically, by comparing the metrics above with the figures recollected at the end of the recruitment (See *Table 12*) and crossing them with the users profiling done by WEIZ, it is possible to assume that:

- Data metrics have shown minimal change, with only 2 additional users who registering between August and September 2023. As a late update, WEIZ registered 22 new users at the beginning of October after local newspaper article and Facebook post reporting the start of installation phase in the households.
- The data keeps showing a significant **gender imbalance**, with 76% of participants being male and only 24% female. This gender gap may indicate a potential outreach challenge or a lack of engagement among females.

- The **income distribution** is diverse, with a notable percentage (33%) of participants choosing not to disclose their income, possibly due to privacy concerns.
 - The largest income group is those earning more than 4500€, comprising 36% of participants. This suggests they may not be very cost-sensitive and are willing to invest in new technologies.
- The **age distribution** suggests a diverse economic background among participants.
 - The majority of participants fall within the 35-50 age range (46%), possibly including many working adults and parents. This might also align with the profile of early adopters who may have a strong interest in new technologies.
 - Specifically, the **concentration of female participants in the 35-50 age group** could indicate that this demographic has a higher income, potentially making them more willing to invest in innovative technologies.
 - A change can be remarked in the 25-34 age group, which passed from 16% to 11%.
 - 65+ participants is the smallest (16%), indicating that older individuals are less represented among the participants.
 - It's noteworthy that there are no female participants in the 65+ and 18-24 age groups, suggesting potential gaps in outreach to these demographics. The absence of females in these age groups could be a challenge in terms of inclusivity and diversity. Efforts should be made to engage these age groups and promote a more balanced representation.

Table 12: WEIZ registered users metrics

September 2023	
Registrations	123 households
Gender	
Male	76,0%
Female	24,0 %
Age	
18-24	1,0 %
25-34	11,0%
35-50	46,0%
51-65	36,0 %
65 +	7,0 %
Income	
< 1500 €	2,0 %
1500 - 2499 €	7,0 %
2500 - 3499 €	11,0 %
3500 – 4499 €	12,0%
> 4500 €	36,0%
I don't want to answer	33,0%

Households with children (under 18 years old)	24 %
Technical requirements	
Internet connection at home	100,0 %
PV for self-consumption	49,0 %
EV	13,0 %
EV charge at home	50,0 %
HVAC system	16,0 %
Electric boiler	17,0 %
Electric heating	43,0 %
District heating	16,0 %
Therm. Solar system with contribution to space heating	14,0%
Ground source heat pump	27,0 %

Source: WEIZ

As a final remark, the data trends suggest a need of improvement in gender balance, a more even income distribution, and age inclusivity of the youngest and oldest demographics. As in the case of ADEE, focusing on these specific socio-demographic segments and seeking to reach higher numbers in EV and HVAC system, WEIZ would be able to reach 200 targeted users showing diversity, inclusion, and alignment with the technical requirements.

5. *SENDER Engagement follow-up strategy*

In light of the recruitment strategies' slightly delayed implementation (until September 2023), some small adjustments have been made to accommodate this situation. Although most of the strategies have been entirely implemented during the Recruitment phase (P1), their outcomes may not become fully visible and hence will be framed within the Consumer Response phase (P2) and the Persistence phase (P3). Specifically, P2 will focus on the creation of a video that showcasing the different installation experiences in the three pilots will be used as visual strategy. Despite this adjustment, the pilots remain committed to their engagement and recruitment efforts, and here are the planned activities and steps WEIZ and ADEE prepared and undertook in the last part of the P1:

ADEE

- Setting up a stand in collaboration with local multipliers with visual material to attract the remaining prospective participants. **(P1 follow up)**
- Participation in the Fira SOC 2023. The event originally planned in September was postponed by the organization to October (27, 28-29). ADEE will participate by explaining the project and attract the interest of the remaining participants and also showing the SENDER equipment and elucidating how these can be installed in households and their benefits. **(P1 follow up and P2)**
- **Training sessions will be conducted** and tailored for individuals who have already registered for the project. These sessions are strategically timed to occur between the commissioning and the installation to ensure that participants are well-prepared and informed throughout the project's various phases. **(P2)**

WEIZ

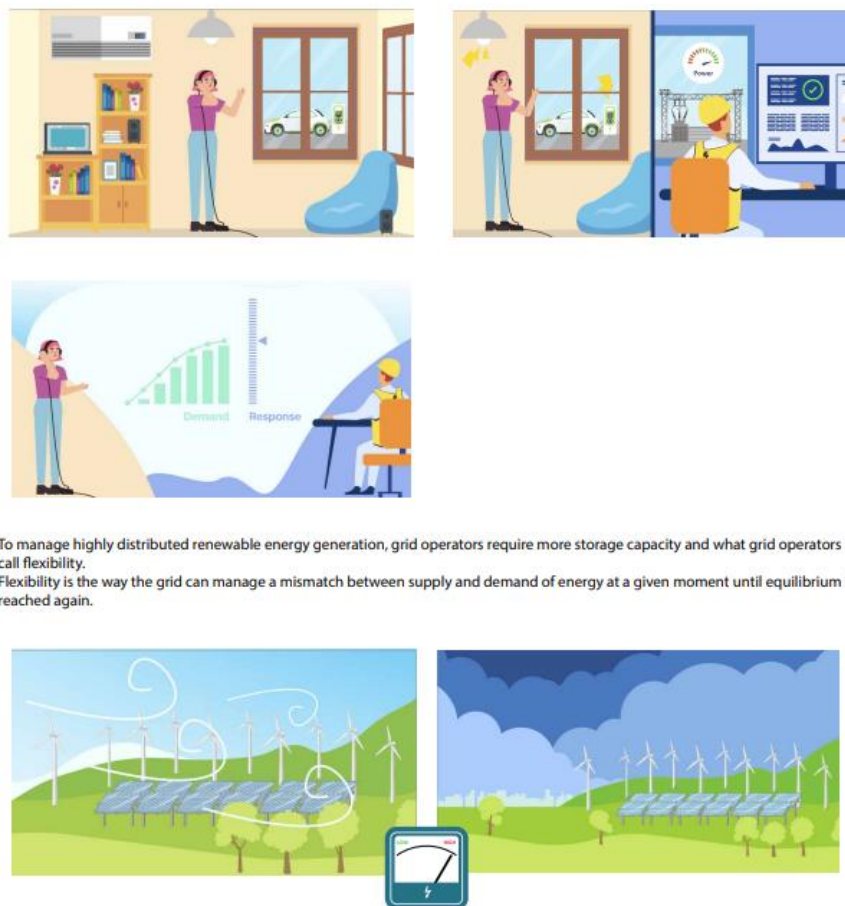
- Publication of a follow-up article in the local newspaper.
- Planning of an online workshop once after half of the installations have been completed, serving as both an exchange of experiences with the system and an opportunity to explain the problem-solving guidelines. **(P2)**.
- WEIZ social media account connected with the city council official channel. A registration post to catch citizens interest will be published by the end of September 2023 **(P1 follow up)**.

VTT stands out as the only pilot that has not only met, but exceeded, the intended target number of registered users. VTT will direct its efforts towards creating a collaborative video with EQY, aiming at providing a comprehensive demonstration of the SENDER equipment installation process within carefully chosen households, as elaborated in the subsequent sections. This video will be part of P2 and P3. In this sense, with a total of 140 registered participants, VTT has the opportunity to strategically select participants who align closely with the specific technical prerequisites of the SENDER project, ensuring also that the participant pool mirrors the broader demographic composition of the Finnish population.

The pending actions showcase the ongoing commitment of the pilots to their engagement and recruitment efforts. The insights gained from these activities will provide valuable input for refining content strategies and further enhancing engagement with the target audiences. For those engagement actions that are not concluded at the current date⁶, an update on the situation will be provided in the *D7.6 Results and Recommendation Report*, presenting the final conclusions of the whole strategy.

5.1. Becoming beta testers

As just mentioned, one of the general recruitment strategies integrated into the P2 phase is the creation of a video, with the support of EQY, demonstrating the installation process in one of the homes. It is part of a two-video package designed to introduce the SENDER project. The first video, in which EQY demonstrates the installation process in one of the homes, will offer a detailed overview of the project concept, development, and its associated benefits.



To manage highly distributed renewable energy generation, grid operators require more storage capacity and what grid operators call flexibility. Flexibility is the way the grid can manage a mismatch between supply and demand of energy at a given moment until equilibrium is reached again.

But this becomes more complicated when renewable energies are added, as their energy production is not constant in time. So how can we optimize the introduction of renewable energies in the power grid while securing its efficiency and sustainability?

Figure 24: SENDER Video plot

⁶ September 29, 2023.

While the second video planned, will be focused on the consumer, aimed at capturing the interest of potential end-users and highlighting the advantages of participating in the initiative. Both videos will be disseminated via social media platforms by the Pilots and will also be featured during various events.

This video will involve the active participation of registered users who have transitioned into beta testers (PER02), a group characterized in D3.2 as individuals possessing a higher level of technical knowledge and who are motivated by social recognition. Additionally, this initiative aims to provide early adopters and highly motivated participants with an opportunity to offer feedback on the implementation of the pilot's use cases. These insights are crucial for understanding whether adjustments are needed or if there are additional aspects to consider. This action can be seen as an extension of the co-creation process already undertaken within SENDER, taking it to a more advanced stage. The primary objective is to gather valuable information for potential enhancements to the SENDER Box, while also fostering a sense of engagement, responsibility, and collaboration among a broader range of users who will have a voice in the process.

6. *Lessons learnt & Conclusions*

Based on the available data and insights from the SENDER project, a general overview on the effectiveness of the three engagement strategies (social media, local multipliers, events/workshops). These lessons provide a comprehensive understanding of what worked and what posed challenges in engaging participants for the project.

Lesson learnt 1: During the **Rise Awareness strategy**, it became evident that using social media was effective in creating initial awareness about the SENDER project. The reach of social media platforms allowed for a quick dissemination of the project information to a wider audience. This aspect highlights the importance of using digital channels for general informative outreach. Considering the 3 pilots results, it is possible to assume that:

- Social media campaigns are useful for reaching a broader audience; however, they might not be as impactful in terms of users' registration.
- The effectiveness of this approach, when analysing the different pilots' outcomes, may vary according to the target audience's familiarity with the specific platform.
- The level of engagement might have been affected by the content, timing, and frequency of posts.

Lesson learnt 2: The VTT campaign's success highlights the potential of using paid promotion to achieve substantial reach and engagement. If resources allow, **incorporating paid promotion into future campaigns could be beneficial**. The ability to target specific demographics and interests with paid promotions might have played a role in the campaign's success. Ensuring that content is tailored to the preferences of the audience could maximize the impact of paid promotions. In conclusion, the VTT campaign's paid promotion demonstrated the potential of this approach in terms of visibility, engagement, and conversions. While it involves a cost, the returns in terms of user engagement and registrations suggest that paid promotion can be a valuable tool in recruitment campaigns, especially when reaching a broader audience is a priority.

Lesson learnt 3: During the **Recruitment strategy**, collaborating with local multipliers proved to be a successful approach. This involved collaborating with local entities and organizations, which played a fundamental role in building trust within the community. This approach sheds light on the impact of local endorsement in encouraging registration and participation in a project, especially if the local entities are well recognized.

Lesson learnt 4: As for the **events or workshops**, at the general level, although the degree of engagement varied among pilots resulting in mixed outcomes, they do not seem to have been a successful strategy. Some of the factors that could have negatively affected the outcome are timing and location, and the topics covered. Specifically, when organizing in-person activities, the participants' availability, and willingness to attend is crucial. Unforeseen challenges during these events may include low attendance, difficulties in balancing work and personal commitments, sudden weather changes. Contingency actions should address these potential issues to ensure full participation. Overall, it's important to note that the effectiveness of each strategy can be influenced by a combination of factors, not only related to the project's specific goals, the characteristics of the target audience, and the local context. On another level, the success of these strategies may not be

immediately evident, and their impact might become clearer during the Consumer Response (P2) and Persistence (P3) phases, as some of the last activities have been delivered with delay.

Lesson learnt 5: An **informal approach**, such as **word-of-mouth**, emerged as a powerful tool in disseminating information about the project. This strategy's success highlighted the project's broad appeal across various age groups and demonstrated the significance of interpersonal networks in project outreach. At VTT, colleagues, friends, and acquaintances directly reached out to the team seeking clarification about the project. These personal interactions not only addressed doubts but also led to their subsequent registration. This dynamic underscores the vital role of personalized engagement in generating interest and motivating individuals to become participants. An analogue situation happened at WEIZ, where although it's challenging to provide precise figures, it is estimated that the word-of-mouth approach reached approximately 20-30 individuals, primarily among colleagues, friends, and family. This informal strategy spanned a range of ages, from 25 to 60, with an even gender distribution of 50% male and 50% female. This highlights the organic spread of project information among close-knit social circles.

Lesson learnt 6: The audience demonstrated a broad **age range**, indicating that energy efficiency and innovation initiatives had broad appeal across generations. When designing engagement and recruitment strategies it is fundamental to consider the population general representation. Some considerations can be done:

- Digital-savvy individuals engage more with social media campaigns, while engagement varied based on content and platform familiarity.
- Small communities trust more local entities, emphasizing the importance of collaborations with local partners.

Lesson learnt 7: The project has encountered **unexpected external factors** during the pilot implementation. Originally, the engagement strategy incorporated economic incentives (10,000€ for each pilot) as a means to help pilots motivating and actively engaging prospective participants. However, the significant increase in international market prices exacerbated by the situation between Ukraine and Russia, strained pilots' resources and disrupted the intended use of economic incentives, reallocating them to procure essential components fundamental for the project's technical implementation. In light of unexpected changes, events or economic constraints caused by international developments, it's crucial to proactively explore alternative non-economic incentives for engagement strategies.

On the other hand, it's essential to note that the design of the strategies to be implemented did not always account for specific regional contexts. For instance, the break between the raising awareness and recruitment phases, due to a longer preparation period, inadvertently reduced the timing available for campaigns. Additionally, the summer break in 2023 and the possible low engagement of individuals was a critical consideration.

These contextual elements emphasize the significance of being flexible and adaptable when crafting engagement strategies. It's vital to acknowledge that regional subtleties can have a substantial influence on the outcome of recruitment initiatives. Therefore, the utmost priority throughout the

strategy development process has been aligning with the distinct requirements of the individual pilots, as they possess an intimate understanding of their unique contexts always maintaining the higher quality of actions and delivering the required data.