



Department  
of Energy &  
Climate Change

# Learnings from the DECC Community Energy Efficiency Outreach Programme

Undertaken by Databuild Research & Solutions Ltd

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# Learnings from the DECC Community Energy Outreach Programme

**Prepared by**

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# 1 Executive summary

The Department of Energy and Climate Change (DECC) funded six pilots and one online study through the Community Energy Efficiency Outreach Programme (CEEOP), between December 2012 and March 2013.

CEEOP was a pilot initiative designed to build a better understanding of the effectiveness of community engagement as an approach to increasing household awareness of, demand for, and installation of energy efficiency measures<sup>1</sup>.

The programme was delivered through Groundwork Trusts and other members of the Community Energy Practitioners Forum (CEPF), comprising:

1. Six 'local'<sup>2</sup> pilot projects, working to deliver energy efficiency projects with local communities.
2. An online pilot, designed to encourage uptake of measures, through using online communities, including use of social media, online forums and blogs.

The six local pilots each included a 'comparator area'; a similar area in the neighbourhood (in terms of size, housing type and demography), where the offers were also available, but not promoted<sup>3</sup>. This helped to provide an understanding of the counterfactual (what would have happened without the intervention).

## 1.1 Introduction

DECC commissioned Databuild Research and Solutions Ltd to deliver a process evaluation of the pilots, undertaken through qualitative research and monitoring of pilot activity, during and after delivery activities.

**Evaluation objectives:** The objectives of the evaluation were to:

- understand the different customer journeys from first engagement to take up of an energy efficiency offer;
- identify the drivers and barriers to success in delivering community level interventions, especially in terms of engaging communities;
- learn which approaches to community engagement or outreach activity work well with particular groups of people, locations or housing types
- identify whether community-based interventions are cost effective, compared to other possible interventions and provide a viable model for the commercial sector in the future;
- assess qualitative feedback from communities about which messages and methods of engagement work best.

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<sup>1</sup> See glossary for definition of energy efficiency measures.

<sup>2</sup> I.e. geographically constrained.

<sup>3</sup> And scheme offer take up was monitored in the same way as the 'test' area.

The research was undertaken through three stages of qualitative research with pilot project leads<sup>4</sup>, community groups and householders engaged through the pilots. Monitoring involved gathering customer tracking information at each stage of the evaluation and costs data.

The key findings of the research are described in the sections which follow.

Whilst the findings provide useful insights as to the success of different approaches in achieving demand for energy efficiency measures through community engagement, it is not possible to make robust conclusions due to the small size of the pilots. The findings should therefore be viewed in this context.

## 1.2 Customer journeys

The pilots were each designed to encourage households to generate interest in and sign up to schemes that would deliver energy efficiency measures, ranging from boiler replacement to wall insulation (referred to as ‘measures’ from this point on). There were two main types of pilot:

1. **Pilots which were largely designed and delivered by a community group, with help from a community support organisation.**
2. **Pilots where the activity was delivered by local community support organisations:** Here the project design, management and delivery were all undertaken by one organisation. This type included the online pilot.

All of the pilots designed targeting approaches which could be fulfilled through existing schemes<sup>5</sup> and aimed to move householders towards installation of measures. Across both types of pilot, customer journey activities included:

1. Initial engagement activities, such as:
  - a. **Mailings or leafleting** – either to directly influence uptake, or more commonly as a precursor to other activities, such as door-knocking
  - b. **Events** – including events specifically initiated to promote schemes, or attending (e.g. with a stall) other events to target householders
  - c. **Door-to-door activities** – to directly target householders for measures in the local area and to provide energy saving advice
  - d. **Online activity** – the online pilot engaged online community forum hosts and bloggers to write content to engage their audiences with schemes.
2. Follow up in-depth advice, including telephone advice, green doctor visits<sup>6</sup> and tailored reports (these were based on door-step surveys encouraging householders to be referred into a scheme to take up energy efficiency measures).

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<sup>4</sup> See glossary.

<sup>5</sup> For example, the [NEST](#) scheme in Wales and Local Authority supported local schemes.

<sup>6</sup> See glossary.

Section 5 of the report provides detailed customer journey diagrams for each pilot, including performance data, which shows the level of householder engagement achieved at each stage.

## 1.3 Pilot performance

The performance of the pilots show two clear findings:

1. **Across all but one of the pilots<sup>7</sup>, the ‘test’ areas out-performed comparator areas on comparable metrics.** This shows that the engagement activities facilitated by community support organisations in the pilot areas raised community interest and participation above what would have happened without them.
2. **The pilots faced a number of barriers in securing clear interest and participation in schemes, which resulted in customers ‘dropping out’ at different stages of the journey.** In general, the extra activity of the pilots managed to reach a large proportion of their target communities, but struggled to generate significant numbers of those signing up for schemes. The reasons why householders were most likely to drop out of the customer journeys included eligibility issues (including tenure), householder lack of interest or perceived ‘hassle’ of taking up measures, lack of trust in commercial schemes, scheme availability and ‘customer-led’ journey steps (e.g. providing numbers for householders to call to refer themselves to a scheme).

Table 4 in the main report provides an overview of each pilot’s performance.

## 1.4 Drivers and barriers affecting success in delivering community level interventions

The evaluation found a variety of factors which affected the success of the pilots in generating interest and sign up to schemes, including:

- **Known barriers about uptake of measures in households.** These affected pilots in terms of:
  - household eligibility for measures – particularly where there was less knowledge about the areas being targeted (audience and/or property types) prior to initial engagement and where the availability or eligibility of schemes was restricted;
  - householder reservations about cost of measures (and uptake of finance) and measure installation (and any potential, associated disruption).

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<sup>7</sup> Which lacked available data to make an appropriate comparison.

These were reported to be the main reasons why householders dropped out from the pilots at the initial engagement stage.

- **Timescales/timing:** All respondents felt that more could have been achieved with more time. Some respondents also reported that the timing of the pilots was unfortunate as many local and national schemes were not available at that time<sup>8</sup>. Those which had existing relationships with schemes and focussed on activities which secured direct householder engagement quickly (e.g. door-knocking) were less affected.
- **Customer journey length and complexity:** Pilots with fewer, simpler steps tended to achieve greater interest and uptake in the time available. Those which had longer, or more complex customer journeys (e.g. initial mailshot, followed by more than one face to face interaction<sup>9</sup> prior to referral for measures). Steps in the journey, which were customer-led (e.g. telephoning a scheme, or installation company) had particularly high drop off rates. Furthermore, having flexibility in delivery led to potential efficiencies, for example skipping intermediary steps (e.g. progressing straight to a green deal assessment) in securing sign up if a householder was clearly interested.
- **Wider market influences (e.g. national schemes<sup>10</sup>)** affected pilots by:
  - reducing householder interest, due to previous targeting (e.g. by commercial providers);
  - requiring significant promotional effort to make them stand out.
- **Being established in the local area** amongst existing networks, contacts and experience of energy efficiency (and their associated reputation) were felt to be crucial to the design, delivery and take up within the pilots.
- **Working with partners** (e.g. local authorities, scheme managers and installers) affected pilots positively by providing endorsement and acting as conduits to community engagement. However, in some instances, partners had negative effects, such as slowing planning stages and removing householder energy efficiency measure schemes.
- **Working with community groups** (e.g. Milton Keynes, Bristol and online pilots) were reported to have positively affected pilots by tapping into existing community networks and using a 'trusted' voice. This helped improve access and take up. In addition, working with community

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<sup>8</sup> For example, some energy efficiency schemes were reported to be in transition (e.g. to new supplier obligation schemes) and Green Deal schemes were reported not to be up and running yet.

<sup>9</sup> Some pilots included a series of initial 'door-step' surveys prior to referral to a scheme (which also would necessitate a home visit) which provided more opportunities for drop out.

<sup>10</sup> For example ECO schemes funded by energy suppliers.

groups provided a network of enthusiastic volunteers, which was felt to increase the chances of self-sustaining pilots after funding ends<sup>11</sup>.

There were also a number of **challenges** associated with working with community groups, including ensuring that

- activities 'fit' with the community group's aims and objectives and
- appropriate time and resources are allowed to ensure the community groups are comfortable to fully endorse the activity.

Finally, volunteers, where used, also had specific training needs which needed to be addressed. Some groups suffered delivery challenges within the timescales due to high targets and poor weather conditions.

## 1.5 Community engagement

The factors involved in successful community engagement are complex, but the findings suggest that:

- securing initial interest was the most challenging aspect, which is reflected in the observed 'drop-out' rates in the early stages of the customer journeys (section 0). As described above, the main reasons for drop out were concerns over the costs and inconvenience associated with installation of measures;
- however, once an 'interested' household had been found, getting them to take up in-depth advice and / or be referred to a scheme was easier.

**Mailings and leafleting approaches** were found to be:

- more effective, when highly targeted – i.e. sent to householders known to be interested, with messages specifically relevant to their situation (e.g. measures applicable to their property to solve known issues);
- less effective, when they were general mail-shots or leaflets to a less well known audience.

**Events** – were used in different ways including:

- events arranged and promoted specifically about the scheme – which were felt to be effective, particularly when scheme managers and installers attended, allowing householders to discuss the whole customer journey in one time/ place. Securing attendance was an issue however, which was felt to be affected by the timescales (e.g. for planning/promoting);
- having a presence at an existing event – helped guarantee attendance and provided the opportunity to engage a wider audience, and less affected by limited timescales but was felt to be less effective in securing actual uptake.

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<sup>11</sup> Some of these benefits were also funded through the pilots delivered by community support organisations, so it is not possible to say that these are exclusive to community groups

**Door-stepping/ in home advice** – was found to be:

- More effective when:
  - targeting a ‘warm’ audience and done through trusted local peers. For example, the ‘neighbour-to-neighbour’ door stepping approach used by Milton Keynes resulted in a sign up rate four times higher than the professional door-stepping company working in the same streets<sup>12</sup>;
  - used further down the customer journey – e.g. a pre-arranged ‘green doctor’ visit which was reported to be valuable in providing detailed and specific advice, identifying appropriate measures which could be discussed and then referred.
- Less effective when:
  - targeting a ‘cold’ audience as householders often turned the offer down (e.g. due to lack of interest or resistance to being targeted on the door-step). The approach was also resource intensive, and where done by community group volunteers, this also had a detrimental effect on morale, for example when they received a negative reception from local neighbours.

## 1.6 Messages used

The six pilots and online study showed that messages were reported to be more effective when:

- they were specifically tailored to the audiences being targeted – i.e. specific to household (e.g. income and tenure) and property types.
- they promoted the benefits of action, such as warmth, fuel bill savings, environmental benefits – here message take up appeared to be affected by income group, for example:
  - warmth and fuel bill savings were reported to be more compelling with low income groups and environmental messages just as or more effective with higher income groups;
  - the online pilot appeared to show environmental messages achieving more click-throughs, (although less is known about the relative use of different messages here as this was in the control of community forum leads and bloggers).
- householders were clear about what was being promoted and what was required of them – householders reported feeling more comfortable entering into a discussion when the purpose was clear (e.g. an installation). In addition, moving through customer journey stages was felt to be more effective (i.e. with fewer dropping out) when the householder had a clear understanding of the next steps in the process.

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<sup>12</sup> Hired to boost numbers.

## 1.7 Cost effectiveness

Cost effectiveness figures were calculated for the pilots in terms of cost per customer 'reached'. This reported figures for the six local pilots ranging between £4 and £50 per household<sup>13</sup>. Whilst this provides an understanding of cost effectiveness, the small scale of each pilots and range of objectives being delivered against, means the figures should be viewed with caution.

There is limited data available on the cost effectiveness of other (e.g. commercial) energy efficiency schemes in the UK. However, an evaluation of the Energy Saving Trust's advice network in 2006/07 provides a figure of £8.90 per customer reached<sup>14</sup>. It should be noted that the Energy Saving Trust's definition of 'reach' was different to that of the pilots, as it was mainly based on telephone advice and direct engagement at events (i.e. direct mail and leafleting was not included).

The online pilot achieved a market 'reach'<sup>15</sup> of 5 million users (at a cost of £0.02 per user), and a click-through rate of 0.06% (£31 per click through). This compares similarly to a UK campaign average<sup>16</sup>.

## 1.8 Lessons learned

**Timescales:** If timescales for delivery are short, schemes are more likely to succeed in securing interest and uptake if they are focussed on cost effective, 'simpler' measures<sup>17</sup>, and there are a limited numbers of partners involved in delivery. Previous experience of working with energy efficiency schemes, and consideration of how a project's timings will fit with energy schemes is also important.

**Customer journey:** The study suggests that, greater uptake is likely to be achieved when the customer journey:

- has fewer 'steps' (separate interactions with customers<sup>18</sup>) – as each provides an opportunity for drop out;
- involves fewer separate partners (e.g. scheme promoters, managers and installers);
- included partners with direct experience of working together and delivering similar schemes.

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<sup>13</sup> See table 3 for definitions of reach between pilots.

<sup>14</sup> Changing Energy Behaviour: [Guidelines for Behavioural Change Programmes](#). An evaluation of Energy Behavioural Change Guidelines (BEHAVE) 2009.

<sup>15</sup> See glossary.

<sup>16</sup> [Smart Insights](#) display advertising click through rates.

<sup>17</sup> Such as cavity wall and loft insulation.

<sup>18</sup> E.g. steps could include mail-outs to raise awareness, door stepping, in-homes surveys, site survey and installation.

In addition, choice of measure(s) is also likely to affect take up (e.g. generating uptake of solid wall insulation is harder than other measures such as loft and cavity wall insulation).

**Drivers and barriers to success:** The study suggests that the most important drivers involve having:

- local knowledge – which helps ensure schemes are relevant to property types and householders; deliverable;
- a ‘trusted’ organisation representing the scheme – which helps overcome householder distrust;
- having a clear and available specific scheme offer(s)<sup>19</sup>.

The most important barriers appear to be concerned with:

- securing initial householder interest – through targeting and promotional activities (e.g. mailings and door-stepping);
- subsequently, not losing the customer once they have shown interest – by delivering follow up activities efficiently and within a reasonable timescale.

**Working with community groups:** There are a number of potentially significant benefits associated with community groups leading or being involved with the promotion of schemes (e.g. trust from the local community, local knowledge etc.). However, in order to maximise these benefits, the aims, objectives, structures and resources of the community groups need to be given consideration when designing schemes.

**Community engagement:** Due to the small size of the pilots it was not possible to identify conclusively, which approaches to community engagement work with particular groups, locations or housing types,. However, aspects which appear to be important include:

- utilising local knowledge and networks to develop engaging messages which are relevant for the audience (e.g. specific to household and property types);
- working with community groups can be effective in securing interest from parts of the community which would otherwise be hard to engage
- using innovative approaches (e.g. the ‘pink bird box’ campaign, Bridgend) can help overcome initial householder engagement barriers;
- tenure – private tenants in particular were challenging to engage due to the need to secure permission from landlords. To overcome this, one pilot attempted to engage landlords, but had limited response.

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<sup>19</sup> Some of the projects found it challenging to find available schemes (e.g. Green Deal providers, which were not ready) or had schemes to offer, but the availability changed during the timescales (e.g. Bristol Pilot, which ceased during delivery).

**Which messages and methods of engagement work best:** It is also not possible to identify conclusively which specific messages or methods of engagement work best. However, aspects which appear to be important include:

- **engagement**

- mailings can work well if the audience is known to be interested. It also can be a useful pre-cursor to other activities (e.g. door knocking);
- events can be very effective if an interested audience attends and particularly if the opportunity is used to inform householders of the full customer journey (e.g. meeting scheme managers, installers). In limited timescales, it was found that piggy-backing on existing events was more successful than developing new, specific events. However, as described above, piggy-backing on existing events was felt to be less effective in terms of securing interest as those attending were not necessarily in the project's target audience;
- door-knocking is resource intensive, and so could be more effective further down the customer journey i.e. when a householder is already known to be interested.

- **Messages**

- saving money and keeping warm – appears to work well for all, but particularly for lower income groups;
- where there are other current - or recent - retrofit schemes and promotional activity in an area, making a scheme stand out and overcoming resident fatigue with the various offers can be challenging. Use of innovative marketing messages can be effective in overcoming this fatigue.

## 2 Glossary

<b>CEEOP</b>	Community Energy Efficiency Outreach Programme.
<b>Community groups</b>	Third sector organisations that are largely – or at least partially – operated by voluntary members. Examples of these groups involved in the CEEOP include the Bedminster Energy Group <sup>20</sup> (BEG) and Wolverton Energy Group <sup>21</sup> (WEG).
<b>Community support organisations / energy professionals</b>	Organisations that consist of paid experts who can deliver and / or support community energy projects. Examples of these organisations involved in the CEEOP include Groundwork <sup>22</sup> or the Centre for Sustainable Energy <sup>23</sup> .
<b>Customer journey</b>	A ‘customer journey’ describes the series of interactions people have with a scheme or company via all available channels (e.g. telephone, web, branch, marketing communications and service interactions).
<b>Energy efficiency measures</b>	Actions which reduce energy use and cut down energy waste. The CEEOP pilots focused upon encouraging households to sign up to schemes providing energy efficiency measures such as wall insulation and boiler replacement.
<b>Energy efficiency retrofit scheme</b>	A scheme, which installs energy efficiency measures to existing buildings to improve their energy efficiency.
<b>Green Doctor visits</b>	Groundwork Green Doctors offer home visits and advice on energy, particularly for the fuel poor, explaining how to access grant support for improvements and giving support on other environmental issues such as recycling, composting and water use. The service is intended to show recipients how to make their homes more environmentally friendly and cheaper to run.
<b>Groundwork UK</b>	Is an environmental regeneration charity that works in partnership with local people, local authorities and business to promote economic and social regeneration. Groundwork coordinated the CEEOP pilots and in some were the lead organisation.
<b>Intensive measures</b>	Intensive’ measures include those which have a high cost and require significant works to install, such as solid wall insulation.
<b>Manchester HELP scheme</b>	Manchester Home Energy Loan Plan. HELP is an interest-free loan available to homeowners in Manchester for the provision of energy saving measures <sup>24</sup> .

<sup>20</sup> <http://www.bedminsterenergy.org.uk/>

<sup>21</sup> <http://www.futurewolverton.co.uk/>

<sup>22</sup> <http://www.groundwork.org.uk/>

<sup>23</sup> <http://www.cse.org.uk/>

<sup>24</sup> <http://www.careandrepair-manchester.org.uk/manchester-services/hrst/the-home-energy-loan-plan/>

<b>Market reach</b>	Estimated number of the potential customers it is possible to reach through an advertising medium or a promotional campaign <sup>25</sup> .
<b>NEST<sup>26</sup></b>	Nest was a scheme promoted in the Bridgend pilot and is the Welsh Government's fuel poverty scheme. It aims to help reduce the number of households in fuel poverty and make Welsh homes warmer and more fuel-efficient places to live.
<b>Pilot Lead</b>	Lead manager responsible for delivering CEEOP pilot.
<b>WRAP up Leeds plus</b>	The Wrap up Leeds scheme provides free installation of eligible energy efficiency measures, focussed on helping vulnerable and/or low income households <sup>27</sup> .

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<sup>25</sup> <http://www.businessdictionary.com/definition/market-reach.html>

<sup>26</sup> <http://nestwales.org.uk/>

<sup>27</sup> <http://www.wrapupleeds.co.uk/>

## 3 Introduction

### 3.1 Background and context

In June 2012, the Department of Energy and Climate Change (DECC) announced that the Government will launch a Community Energy Strategy in the autumn of 2013.

The Government recognises that community involvement in energy projects can bring benefits to take up. However, as the sector is relatively new and rapidly developing, the existing and potential scale of community energy activity in the UK is not yet well understood<sup>28</sup>.

The Community Energy Efficiency Outreach Programme (CEEOP) provided an opportunity to gather evidence to inform understanding of the effectiveness of community engagement as an approach to increasing household awareness of, demand for, and installation of measures.

### 3.2 The Community Energy Efficiency Outreach Programme

CEEOP was a pilot initiative designed to build a better understanding of the effectiveness of community engagement as an approach to increasing household awareness of, demand for, and installation of measures. The programme was delivered through Groundwork Trusts and other members of the Community Energy Practitioners Forum (CEPF<sup>29</sup>), comprising:

1. Six 'local'<sup>30</sup> pilot projects, working to deliver energy efficiency projects with local communities.
2. An online pilot, designed to encourage uptake of measures, through using online communities, including use of social media, online forums and blogs.

The pilots (hereafter referring to both the local pilots and the online pilot collectively) were operational between January and March 2013, delivering activities designed to encourage householders to take up measures using existing networks and schemes, where possible.

**Assessing the counterfactual:** Each of the six local pilots were delivered in a small geographical area alongside a 'comparator' area, which was similar in all respects (e.g. housing type, demographic profile and energy efficiency

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<sup>28</sup> DECC (2013) Community Energy in the UK: [A review of the evidence](#).

<sup>29</sup> <http://www.cepf.org.uk/>

<sup>30</sup> i.e. geographically constrained.

measure offers) but did not receive outreach engagement, to help assess the counterfactual. As the online pilot was not geographically constrained (i.e. householder take up could have come from any part of the UK), assessment of the counterfactual was not possible for this pilot.

### 3.3 Evaluation of CEEOP

DECC commissioned a process evaluation to be undertaken alongside delivery of the pilots. The objectives of the evaluation were to:

- understand the different customer journeys from first engagement to take up of an energy efficiency offer;
- identify the drivers and barriers to success in delivering community level interventions, especially in terms of engaging communities;
- learn which approaches to community engagement or outreach activity work well with particular groups of people, locations or housing types;
- identify whether community-based interventions are cost effective, compared to other possible interventions and provide a viable model for the commercial sector in the future;
- assess qualitative feedback from communities about which messages and methods of engagement work best.

This report outlines the results of the process evaluation and will be used to:

1. Inform DECC policy making; such as feeding into the forthcoming DECC Community Energy Strategy.
2. Inform the community energy sector about what works in delivering measures within local communities.

### 3.4 Evaluation approach

The evaluation was conducted alongside pilot delivery, capturing feedback and monitoring data from the pilot teams early in delivery, at the mid-point and a few weeks after projects had completed.

This enabled key metrics, successes and challenges to be highlighted as early as possible and tracked throughout the process. It also ensured that pilot logic maps could be established, against which customer engagement, sign up and installation could be measured.

The key stages of the research are summarised in Table 1.

**Table 1: Summary of the evaluation stages**

Stage	Evaluation elements <sup>31</sup>	Key areas / research questions explored
Early delivery	<ul style="list-style-type: none"> <li>Qualitative face-to-face and telephone interviews with pilot team representatives</li> <li>Review of pilot inception documents and monthly monitoring reports</li> </ul>	<ul style="list-style-type: none"> <li>Explore project design, barriers being addressed, audiences targeted and measure schemes</li> <li>Understand the role of community groups</li> <li>Customer journey mapping.</li> <li>Anticipated delivery challenges.</li> </ul>
Mid-delivery	<ul style="list-style-type: none"> <li>Review of monthly monitoring reports</li> <li>Follow up short interviews with pilot teams to provide updates</li> </ul>	<ul style="list-style-type: none"> <li>Experience of delivery to date, including activity levels, performance of partners etc.</li> <li>Establish and understand any changes from the original project design</li> <li>Effectiveness of community engagement and messages</li> <li>Successes and barriers</li> </ul>
Post-completion	<ul style="list-style-type: none"> <li>Qualitative face-to-face and telephone interviews with pilot team representatives</li> <li>Review of final monitoring reports</li> <li>Qualitative telephone interviews with householders engaged in the pilots</li> <li>Full data analysis</li> </ul>	<ul style="list-style-type: none"> <li>Pilot outputs/ likely longer term impacts</li> <li>Experience, opportunities and challenges</li> <li>Assessment of the effectiveness of different engagement approaches</li> <li>[where applicable] experience of working with community groups.</li> <li>Householder experience</li> </ul>

### 3.4.1 Pilot team in-depth interviews

21 in-depth interviews were conducted with pilot project leads<sup>32</sup> and 6 interviews were conducted with the community groups involved in the Milton Keynes and Bristol projects<sup>33</sup>. 12 were face to face interviews (more face to face interviews were undertaken at the beginning to establish rapport) and 15 were telephone (which enabled a larger number of people to be interviewed).

**Recruitment:** Groundwork UK provided Databuild with the key contacts from each of the pilots. The pilots had all been made aware of the monitoring and evaluation activities occurring alongside the programme from outset, which aided recruitment and participation.

<sup>31</sup> In addition to the interviews with individual pilot team members, monthly pilot team meetings were held at Groundwork offices, during which pilot progress and issues encountered were discussed.

<sup>32</sup> 11 face to face, 10 telephone.

<sup>33</sup> One face to face and five telephone.

### 3.4.2 Householder interviews

30 in-depth telephone interviews were conducted with a sample of households that had been engaged through the pilot activities (approx. 4 per pilot).

Interview topic areas included:

- background and previous engagement with energy efficiency;
- how they encountered the pilot activities and their views on it – reservations and reasons for deciding to engage;
- views on the customer journey as they experienced it and the different engagement methods used throughout.

Recruitment: Within each pilot, respondents were randomly selected as far as possible. Attempts were also made to obtain responses from those who had different levels of engagement, i.e. those who signed up or registered interest but didn't progress, those who were referred but didn't install, and those who completed (or planned) installations.

### 3.4.3 Monitoring data

Monitoring data was tracked by each project throughout delivery in both test and comparison areas, where this was possible. This included numbers of householders engaged, tracking through each pilot's customer journey and spend data (where possible). This allowed analysis of the customer journey and helped inform areas of exploration through the mid and final stage interviews.

### 3.4.4 Analysis

On receiving all data in the final stage of the evaluation, analysis was undertaken to ascertain:

- numbers of customers at each stage of the customer journeys across each project/ engagement approach and descriptions of explored reasons for drop out at each stage;
- assessment of the impact of delivery issues affecting customer take up;
- assessment of pilot area take up vs. comparator groups, including descriptions of the differences between the areas;
- cost effectiveness – between approaches taken and projects.

### 3.4.5 Limitations

Limited information could be collated about contextual factors within each pilot due to the short timescales involved (the pilots were delivered between January and March 2013).

In addition, the small scale of the pilots meant that there is limited potential to make effective comparisons (e.g. cost effectiveness) between the pilots and other energy efficiency campaigns.

## 4 Overview of the pilots

The pilots were each designed to encourage households to sign up to schemes that would deliver measures, ranging from boiler replacement to wall insulation. There were two main types of pilot:

1. **Pilots where activities were co-ordinated by a community support organisation, but largely designed and delivered ‘on the ground’ by a community group.** Bristol, Milton Keynes and the online pilot fit this description.
2. **Pilots where the activity was co-ordinated, designed and delivered by local community support organisations:** Here the project design, management and delivery was all undertaken by one organisation. Leeds, Cornwall, Manchester and Bridgend fit this description.

Each of the pilots were designed to test the efficacy of outreach activity in generating household interest in energy efficiency schemes, taking householders as far along the process towards installation of household measures as possible within the timescales available.

To help achieve this, Groundwork UK, (who centrally co-ordinated the activities) worked with each individual pilot to set targets to ensure they worked towards a set of tangible output-based goals.

The table below summarises the aims and objectives of each pilot, organisations involved in delivery and roles and responsibilities.

**Table 2: Overview of CEEOP pilots**

Pilot	Pilot aims and objectives	Lead organisation(s) and partners
	Community group-led pilots	
Bristol	<p><b>Aim:</b> Test community-group led approaches to encourage householders in Greater Bedminster to sign up to the Bristol Home Energy Upgrade scheme (BHEU).</p> <p><b>Approaches:</b> <u>Initial promotion</u> (events, posters, mailshot, radio). <u>Follow up tailored advice</u> (events, phone advice).</p> <p><b>Scheme:</b> BHEU – provided subsidy for SWI and boilers</p> <p><b>Target:</b> Sign up 100 households to BHEU.</p>	<ul style="list-style-type: none"> <li>Co-ordinated by the Centre for Sustainable Energy (CSE), working with Bedminster Energy Group (BEG). CSE managed the pilot and helped BEG with delivery.</li> <li>BEG fed into design of materials and led delivery activities including mail-outs and promotional activity, organising, attending and running events, including film nights and market stands.</li> </ul>
Milton Keynes	<p><b>Aim:</b> Test community-group led approaches in Wolverton to encourage sign up to green deal assessments.</p> <p><b>Approaches:</b> <u>Initial promotion</u> (mail outs, door knocking and events), to get sign up. <u>Follow up tailored advice</u> through home assessment, including report to encouraging sign up to green deal assessment.</p> <p><b>Scheme:</b> Green Deal Assessment.</p> <p><b>Target:</b> Completion of 200 home surveys.</p>	<ul style="list-style-type: none"> <li>Coordinated by the National Energy Foundation (NEF), in partnership with between Wolverton Energy Group (WEG).</li> <li>NEF managed the pilot and helped WEG with training and delivery.</li> <li>WEG fed into design of materials, conducted both door-knocking and home surveys for interested households. Led organisation of a local energy event.</li> </ul>
Online	<p><b>Aim:</b> Test online community-led approaches and messages to encourage interest and uptake of measures.</p> <p><b>Approaches:</b> Testing efficacy of five different green deal related messages, working with online community leads through forums and blogs (e.g. Netmums, environmental bloggers etc.). Led to click throughs to measure referral site.</p> <p><b>Schemes:</b> National scheme referrals.</p> <p><b>Target:</b> No target set.</p>	<ul style="list-style-type: none"> <li>Managed by Groundwork UK, working with marketing agency Arnold KLP.</li> <li>Arnold KLP <ul style="list-style-type: none"> <li>Engaged online ‘community leads’, who were requested to write content that tied in with the messages being promoted and included links for page visitors to find out more.</li> <li>Set up a referral process to national schemes.</li> </ul> </li> </ul>
Community support organisation-led pilots		
Bridgend	<p><b>Aim:</b> Test local community support organisation-led approaches to encourage householders sign up to NEST, a fuel poverty focussed scheme in Wales.</p> <p><b>Approaches:</b> <u>Initial promotion</u> – leafleting, door-knocking, innovative approaches (pink bird boxes) to encourage local interest. <u>Follow up</u> – including advice, eligibility checks and referral.</p> <p><b>Schemes:</b> NEST</p> <p><b>Target:</b> 100 scheme referrals.</p>	<ul style="list-style-type: none"> <li>Led and delivered by Groundwork Bridgend and Neath Port Talbot.</li> <li>Some utilisation of local community organisations for specific activities.</li> </ul>
Manchester	<p><b>Aim:</b> Test local community support group-led approaches to encourage sign up to energy efficiency home assessments and referrals home energy loan scheme, in a deprived area.</p> <p><b>Approaches:</b> <u>Initial promotion</u> – leafleting, posters, door knocking. <u>Follow up</u> – advice line contact, to generate interest in home survey, referral to council scheme.</p> <p><b>Scheme:</b> Manchester HELP scheme.</p> <p><b>Target:</b> 100 home surveys, leading to referral.</p>	<ul style="list-style-type: none"> <li>Designed and delivered by the local Groundwork office overseen by Manchester council, who selected areas and managed referrals to HELP.</li> <li>Some utilisation of local community organisations for specific activities but the pilot was led by community energy professionals.</li> </ul>
Cornwall	<p><b>Aim:</b> Test local community support organisation-led engagement approaches to encourage uptake of SWI.</p> <p><b>Approaches:</b> <u>Initial promotion</u> – direct mail, posters, media. <u>Follow up</u> – phone advice, drop-in events, in home energy/Green Deal Assessment leading to referral.</p> <p><b>Scheme:</b> Free external wall insulation (delivered by CEP).</p> <p><b>Target:</b> 60 installations.</p>	<ul style="list-style-type: none"> <li>Community Energy Plus (CEP) designed and delivered the pilot.</li> <li>Some utilisation of local community organisations for specific activities.</li> </ul>
Leeds	<p><b>Aim:</b> Test local community support group-led approaches to encourage sign up to council-led scheme.</p> <p><b>Approaches:</b> <u>Initial promotion</u> – direct mail, door knocking, events, drop-in sessions. <u>Follow up</u> – further advice, including Green Deal assessment, survey completion.</p> <p><b>Scheme:</b> WRAP up LEEDs plus.</p> <p><b>Target:</b> 150-200 home surveys / assessments.</p>	<ul style="list-style-type: none"> <li>Groundwork Leeds led the pilot in partnership with Yorkshire Energy Services (overseen by Leeds City Council).</li> <li>Some utilisation of local community organisations for specific activities but the pilot was led by community energy professionals.</li> </ul>

## 4.1 Barriers to take up of energy efficient measures

### 4.1.1 Which barriers to take up of energy efficient measures were the pilots designed to overcome?

**Overcoming known barriers to uptake of energy efficient measures amongst householders:** All pilot leads reported designing their pilots to overcome existing known barriers to up take of measures<sup>34</sup>. These included:

- not being aware of the opportunities available for their home;
- not being aware of support available to help them take action;
- not seeing energy consumption as an important issue.

**Focus on ‘intensive’ measures<sup>35</sup>:** In addition, all of the local pilots focussed on more intensive measures, such as solid wall (internal and/or external) insulation, other forms of insulation (e.g. floor) and measures such as glazing and heating systems. These were offered either in isolation or as part of a range of measures in a package.

The table below outlines the schemes and measures promoted by each pilot.

**Table 3: Schemes and measures promoted**

Pilot	Scheme and measures promoted
Bridgend	<ul style="list-style-type: none"> <li>• <b>NEST</b></li> <li>• Boiler / heating system, wall insulation, micro-generation</li> </ul>
Bristol	<ul style="list-style-type: none"> <li>• <b>BHEU</b></li> <li>• Boiler / heating system, solid wall insulation</li> </ul>
Cornwall	<ul style="list-style-type: none"> <li>• <b>Local partnership scheme delivering free external solid wall insulation</b></li> <li>• Primarily solid wall insulation, loft and cavity wall insulation, heating upgrades passed to other installers, some information on community switching</li> </ul>
Leeds	<ul style="list-style-type: none"> <li>• <b>Non-specific / dependent upon customer circumstance (i.e. Green Deal<sup>36</sup> / ECO)</b></li> <li>• Solid wall insulation, loft and cavity wall insulation, boiler / heating system, draught proofing and glazing</li> </ul>
Manchester	<ul style="list-style-type: none"> <li>• <b>Non-specific / dependent upon customer circumstance (i.e. Green Deal / ECO)</b></li> <li>• Solid wall insulation, loft and cavity wall insulation, boiler / heating system, draught proofing and glazing</li> </ul>
Milton Keynes	<ul style="list-style-type: none"> <li>• <b>Non-specific / dependent upon customer circumstance (i.e. Green Deal / ECO)</b></li> <li>• Primarily solid wall insulation, loft and cavity wall insulation and heating upgrades, some information on community switching, micro-generation</li> </ul>
Online	<ul style="list-style-type: none"> <li>• <b>Birmingham Energy Savers or NEST</b></li> <li>• Solid wall insulation, loft and cavity wall insulation, boiler / heating system, draught proofing and glazing, micro-generation</li> </ul>

<sup>34</sup> Recent publications outlining these include the DECC Energy Efficiency Strategy [2012] and Consumer Futures' [‘What’s in it for me: Using the benefits of energy efficiency to overcome the barriers’](#)

<sup>35</sup> See glossary.

<sup>36</sup> The pilots were delivered prior to the launch of the Green Deal.

The fact each pilot was promoting different measures meant the pilots were looking to overcome barriers specific to these measure types, such as:

- measure cost – and associated take up of finance, where necessary, e.g. Green Deal and local schemes (e.g. Manchester HELP scheme);
- assessment /survey needs – to specify appropriate measures;
- inconvenience or perceived disruption caused by measure installation.

Some of the pilots used additional local support schemes to remove some of these barriers. For example, the Cornwall pilot was able to fully fund solid wall insulation measures from an existing scheme being run in the area (thus looking to overcome the measure cost barrier). Other pilots looked to overcome barriers through targeting households likely to be eligible for fuel poverty schemes (e.g. the NEST scheme in Wales), which would also overcome cost issues.

**Audience focus:** Some pilots targeted specific audiences within the household sector. These pilots focused on barriers specific to them, such as:

- tenure – where householders would require permission from the landlord to take action (e.g. Cornwall);
- low income or vulnerable households – where the effect of known barriers such as costs and awareness of opportunities are magnified (e.g. Bridgend, Leeds and Manchester).

## 4.2 Engagement methods used

### 4.2.1 How were community engagement plans developed and how were they tailored to the target communities?

Engagement plans were developed in response to receiving the go ahead for the pilot in December 2012. Plans were developed for community engagement, based on:

- **partners involved** – where the approach differed between:
  - community group-led pilots: Where development was undertaken in partnership between the community group and the community support organisation. For example, in Bristol, CSE managed the process and led the pilot design, but involved Bedminster Energy Group at key development stages to ensure the pilot design would fit well with the group's priorities and delivery capabilities;
  - community support organisation-led pilots: Where development was approached more autonomously, drawing on knowledge and experience of delivering previous programmes within the local community.

Across both, development discussions were also held with other partners, such as scheme providers, local authorities and other community groups to help develop plans.

- **types of schemes available for promotion by the pilots** –some schemes had strict eligibility criteria (e.g. household receipt of certain benefits) and restrictions in terms of housing type they were eligible for. Discussions were held with scheme managers to ensure pilot leads understood these criteria to feed into plans for the pilots.
- **target audiences and housing types** – this was determined by whether the audience was owner occupiers/ rented sector or in particular income groups. For some pilots, housing stock data was sourced (e.g. Local authority stock data) to help identify appropriate areas to target.
- **tailoring to the target communities:** This was based on:
  - community-led knowledge and experience –in Milton Keynes and Bristol, several of the members of the community groups lived in the streets within the test area, with similarities in terms of housing type and occupants. This meant they had in-depth knowledge of the types of measures which would be appropriate and the engagement approaches which would likely succeed. Other examples of where this was used included:
    - ensuring sufficient time was spent with householders to discuss and explain measures and scheme issues to ensure they had confidence prior to going ahead;
    - development of innovative approaches, known to stand out – e.g. the use of pink bird boxes on lampposts and at schools to advertise the scheme in Bridgend.
- **discussions with other partners:** Most of the pilots utilised the knowledge and experience of partners including local authorities and scheme providers to tailor area selection and inform targeting. In addition, where pilots were being delivered by community support organisations<sup>37</sup>, most sought to engage known local groups and networks to see how they might help engagement.

For the online pilot, engagement plans were developed differently. A set of key messages was developed, which differed according to the potential interests of the audiences engaged<sup>38</sup>. Messages were tested through engaging online community leads. Here they allowed the leads to write their own content (based on some core messages) to allow them to tailor them to maximise interest.

Discussions were also held with scheme providers (e.g. Energy Saving Advice Line and other national/local schemes, such as NEST and Birmingham Energy Savers), to help develop an effective fulfilment process.

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<sup>37</sup> Without a community group as a direct partner.

<sup>38</sup> The overall audience focus was wide, but with messages designed to engage subgroups, such as higher or lower income groups.

## 4.2.2 How did pilots raise awareness and use community engagement to secure uptake?

The pilots used a range of approaches to engage communities to secure interest and uptake of the schemes.

**Initial awareness raising and advice:** Initial awareness raising and advice provision was delivered through a variety of activities, including:

- leafleting and general mail-shots – used to raise awareness of the schemes and to inform residents of further targeting (e.g. door-stepping) in their street;
- targeted mail-outs – used to inform audiences already known to the pilot lead, such as in Bristol where the community group wrote to all householders they had previously engaged with through prior work<sup>39</sup>;
- promotion through community networks – several pilots worked with local groups and leaders, such as councillors;
- posters – put up in community hubs, such as places of worship and schools;
- events – arranging specific events or attending existing events with a stall and materials to help engage attendees.

Across a number of pilots, there were examples of new and innovative approaches to initial awareness raising and the provision of initial advice, including

- ‘neighbour-to-neighbour’ in-home advice, delivered by the community group in Wolverton, Milton Keynes. This involved training community group volunteers on delivering energy efficiency advice, tailored to be specifically relevant to the houses in which they and their neighbours lived. This allowed the volunteers to engage their neighbours and encourage them to take up advice and a green deal assessment by example / sharing experience amongst their peers;
- innovative ‘viral’ campaigns – examples of this included the use of ‘pink bird boxes’ in Bridgend in prominent parts of the town, where they would be seen by many. This was reported to have generated significant interest and discussion in the local area, helping to spread the messages of the pilot by word of mouth;
- use of social media and online forums to promote messages – the online pilot engaged community forum hosts to raise awareness amongst their audiences. The forum hosts were provided with some over-arching messages, which were then used to write their own content, which they thought would interest/engage their audiences.

**Follow up tailored advice:** Awareness raising and targeting was followed up by different forms of tailored advice with the aim of providing more information in the first instance and ultimately encouraging householders to sign up to the scheme. Follow up tailored advice could take the form of an in-home assessment or an actual referral to a scheme.

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<sup>39</sup> In this case, those who had been targeted through a previous project funded by the DECC Local Energy Assessment Fund (LEAF).

Approaches included:

- advice provided at events – in some cases this allowed for attendees to be informed about all elements of the scheme, such as meeting scheme managers and/or installers to get a detailed understanding of the whole process<sup>40</sup>;
- door-step or in-home surveys (e.g. green deal assessments), which were usually pre-arranged.

Specific methods utilised in each pilot are summarised in Appendix 1.

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<sup>40</sup> This could have been follow up advice (i.e. for householders already signed up and encouraged to attend the event to get more details), or initial advice for those attending the event without any prior engagement.

## 5 Pilot Performance and customer journeys

This section provides an overview of pilot performance, in terms of numbers of householders engaged at key stages in the customer journey, including how these compare to 'comparator' areas<sup>41</sup>.

The section also provides overview 'customer journey' diagrams to show each stage in the householder's intended journey towards installation of an energy efficiency measure, including at each stage, the activities delivered by the project leads and other stakeholders (e.g. scheme managers).

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<sup>41</sup> Note, this is not available for the online and Manchester pilots.

## 5.1 Assessing pilot performance

Table 4: Pilot performance overview<sup>42</sup>

Pilot	Area	HH's in target area	HH's contacted (Reach)	Initial direct engagement (e.g. telephone advice, door-step surveys, online survey)		Follow up engagement (e.g. in home assessment <sup>43</sup> )	Progressing towards installation
Bristol	Test	9,905	5,250	143	72*	43	16
	Comparator	n/a	n/a	104	51*	n/a	n/a
Bridgend	Test	2868	1,421	112**			20
	Comparator	n/a	n/a	32**			n/a
Cornwall	Test	606	606	164		63	30
	Comparator	n/a	n/a	n/a		n/a	4
Leeds	Test	10,295	1,600	400-500		82 (32 full)	30
	Comparator	n/a	n/a	n/a		n/a	3
Manchester	Test	6,000	1,000	239		39	n/a
Milton Keynes	Test	2,500	2,500	180		38	
	Comparator	n/a	n/a	n/a		10	
Online	Test	5,000,000	3,041	139			

\*= directly advised on scheme available

\*\* = referrals to NEST scheme

<sup>42</sup> Note, greyed out boxes show where data was not available.

<sup>43</sup> For example, Green Deal Assessments. Where denoted as 'full' this involved surveys for viability of specific measures (e.g. Solid Wall Insulation).

Regarding pilot performance Table 4 shows two clear findings:

- 1. Across all but one of the pilots<sup>44</sup>, the ‘test’ areas out-performed comparator areas on comparable metrics:** This shows that the engagement activities conducted in the pilot areas did raise community interest and participation in the schemes above the baseline that would likely have been achieved without the pilot activities.
  
- 2. The pilots faced a number of challenges in securing clear interest and participation in schemes, which resulted in customers ‘dropping out’ at different stages of the journey.** In general, the pilots managed to reach a large proportion of their target communities, but struggled to generate significant numbers of those signing up for schemes. The reasons why householders were most likely to drop out of the customer journeys were as follows:
  - householders not being eligible for the scheme and / or already having had works done on their property;
  - householders in the private rented sector uncertain about getting permission for fabric changes and landlords not being very interested;
  - householders not wanting the inconvenience and potential disruption of taking up installation activity;
  - householders not trusting commercial schemes;
  - delays in the process leading to people deciding not to go ahead;
  - offers closing (due to the timescales of the pilots and schemes);
  - offers not being available as early as expected e.g. ECO in Manchester, Green Deal scheme in Milton Keynes<sup>45</sup>.

Each of these reasons is explored in detail in section 5.2.

### 5.1.1 Customer Journeys

Each pilot team designed an intended ‘customer journey’<sup>46</sup>, which underpinned engagement activities and could be used to map customer progress and drop out.

These customer journeys are depicted in the diagrams below. The diagrams are intended to help the reader visualise how the process for each pilot was intended to operate. This then provides some context for findings around what worked well or otherwise in securing household take up, in particular potential stages for households dropping out. The diagrams also illustrate the level of complexity of each pilot.

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<sup>44</sup> Which lacked available data to make an appropriate comparison.

<sup>45</sup> As reported elsewhere in the report, this was an issue which appeared to be affecting several parts of the market.

<sup>46</sup> See glossary.

**Customer Journey:** The customer journey diagrams for each pilot are set out in the sub-sections below (pages 28-34):

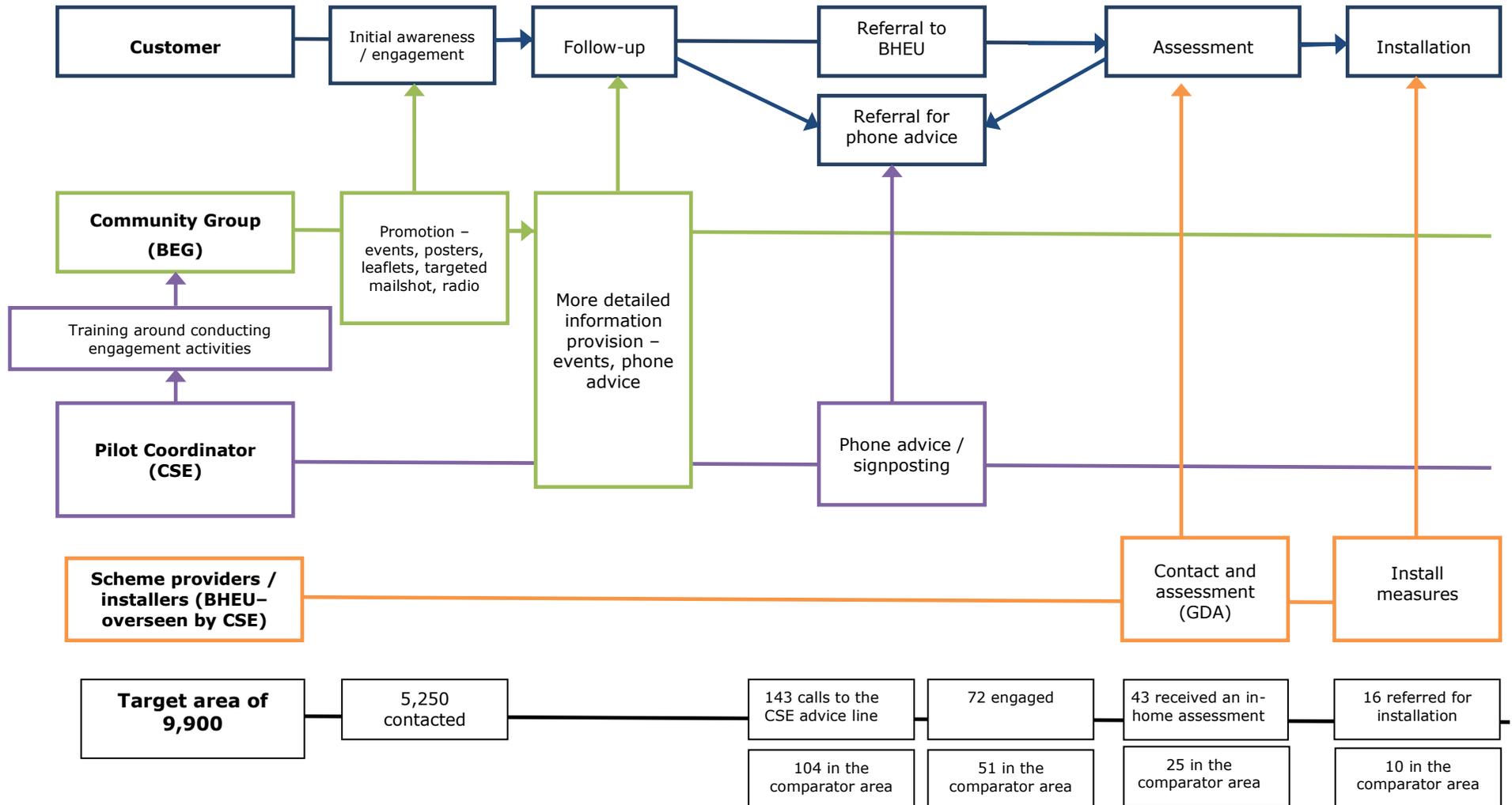
- the top blue row shows the intended journey and milestones for the household participating in the pilot;
- the green row shows the role the lead pilot organisation played in the process;
- other rows below show the other key partners involved in the pilot and the extent of their role;
- the arrows in each diagram indicate how the process was intended to progress and where in the process different partner roles were performed.

**Scheme performance:** For each pilot, the diagrams set out:

- the numbers of customers reaching each key customer journey milestone on each pilot [purple boxes];
- performance against the target [shown in the green boxes] established at the outset of the pilot;
- how the pilot area performed - on a comparable metric and in the same time period – against the comparator area. Figures for the comparator area are shown in black boxes below the comparable stage of the pilot area customer journey

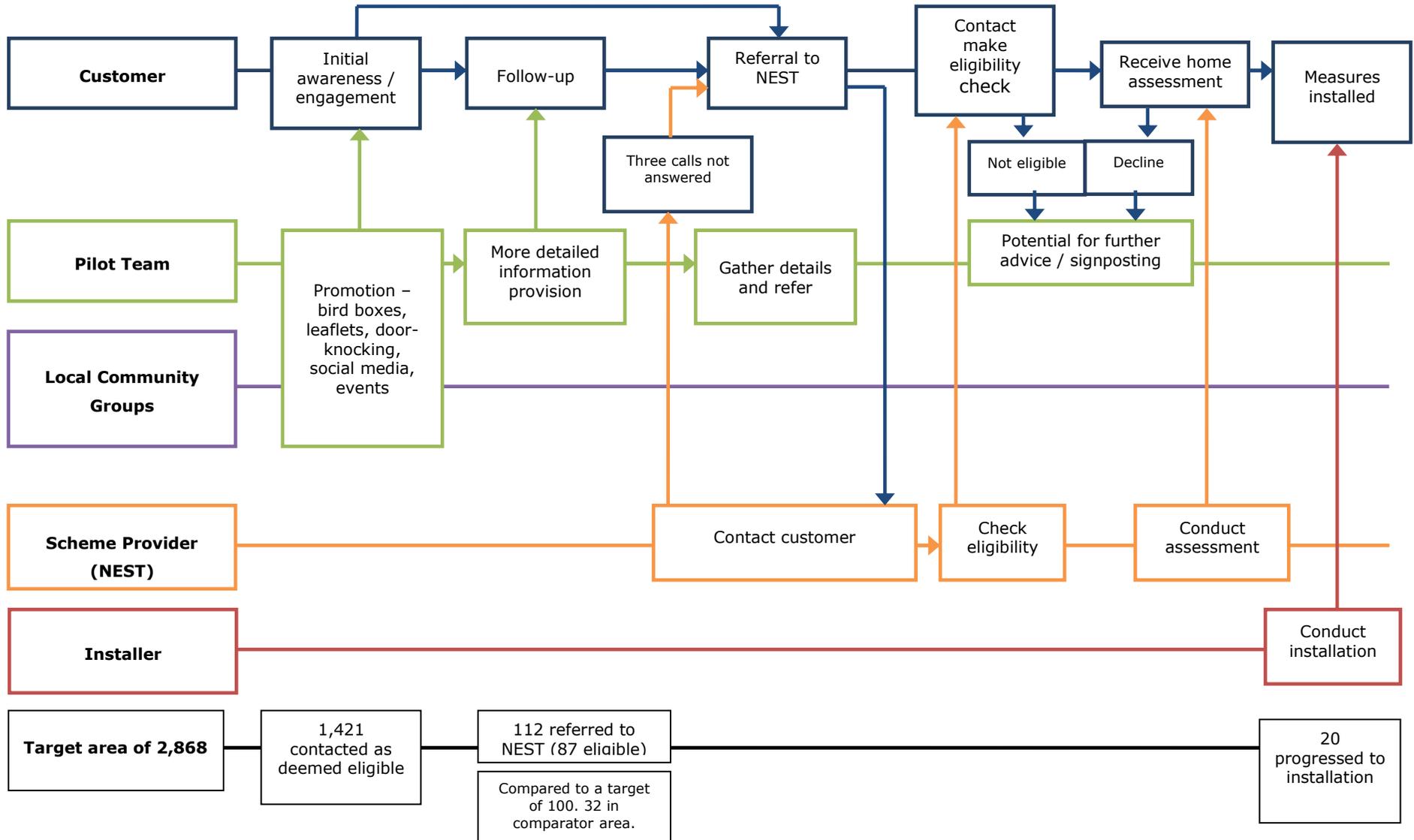
### 5.1.2 Bristol

The Bristol scheme encouraged uptake to the BHEU scheme, whilst it was available, including boiler/heating upgrades and solid wall insulation.



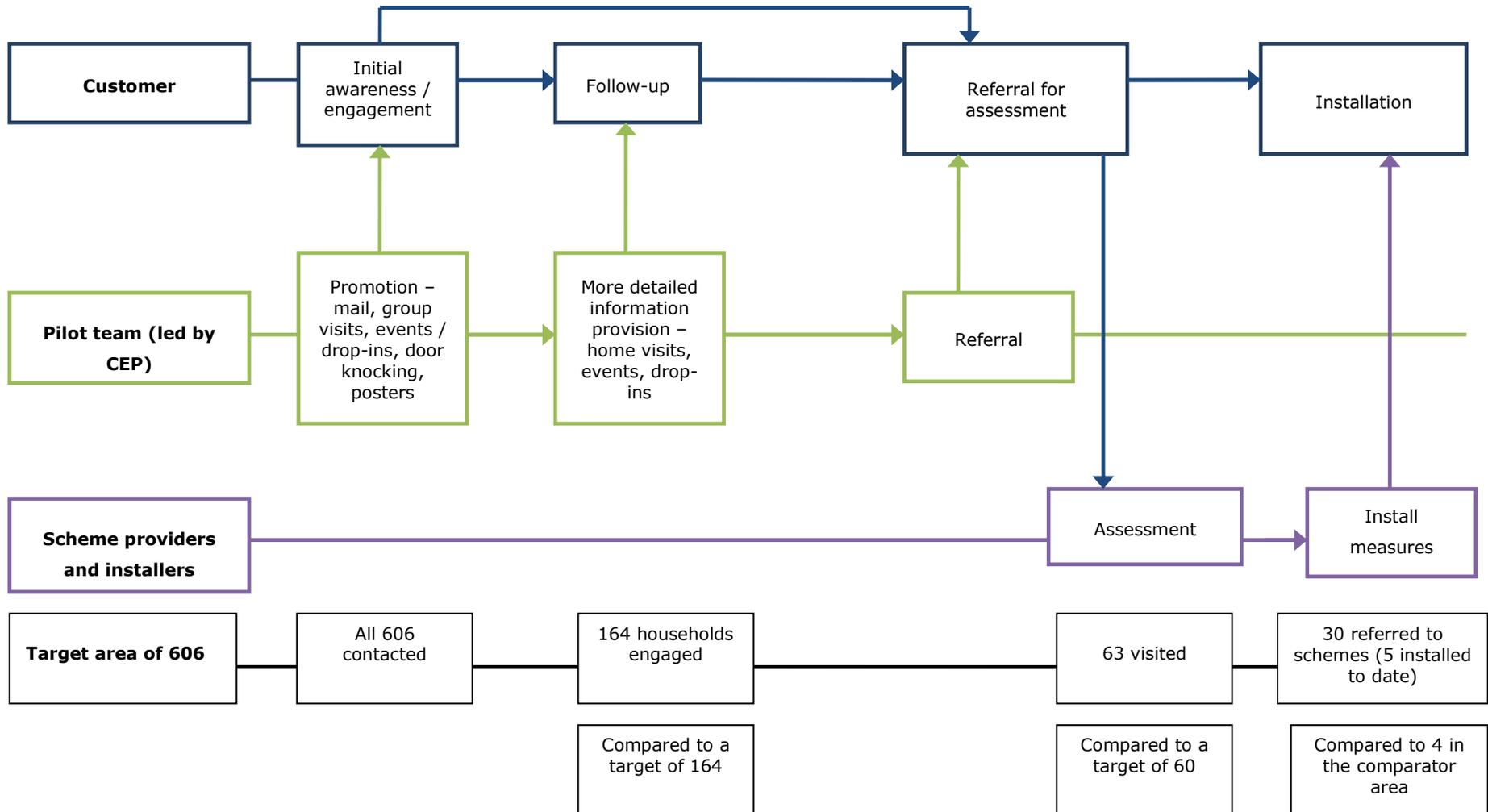
### 5.1.3 Bridgend

The Bridgend scheme encouraged householders to sign up to the Welsh NEST scheme.



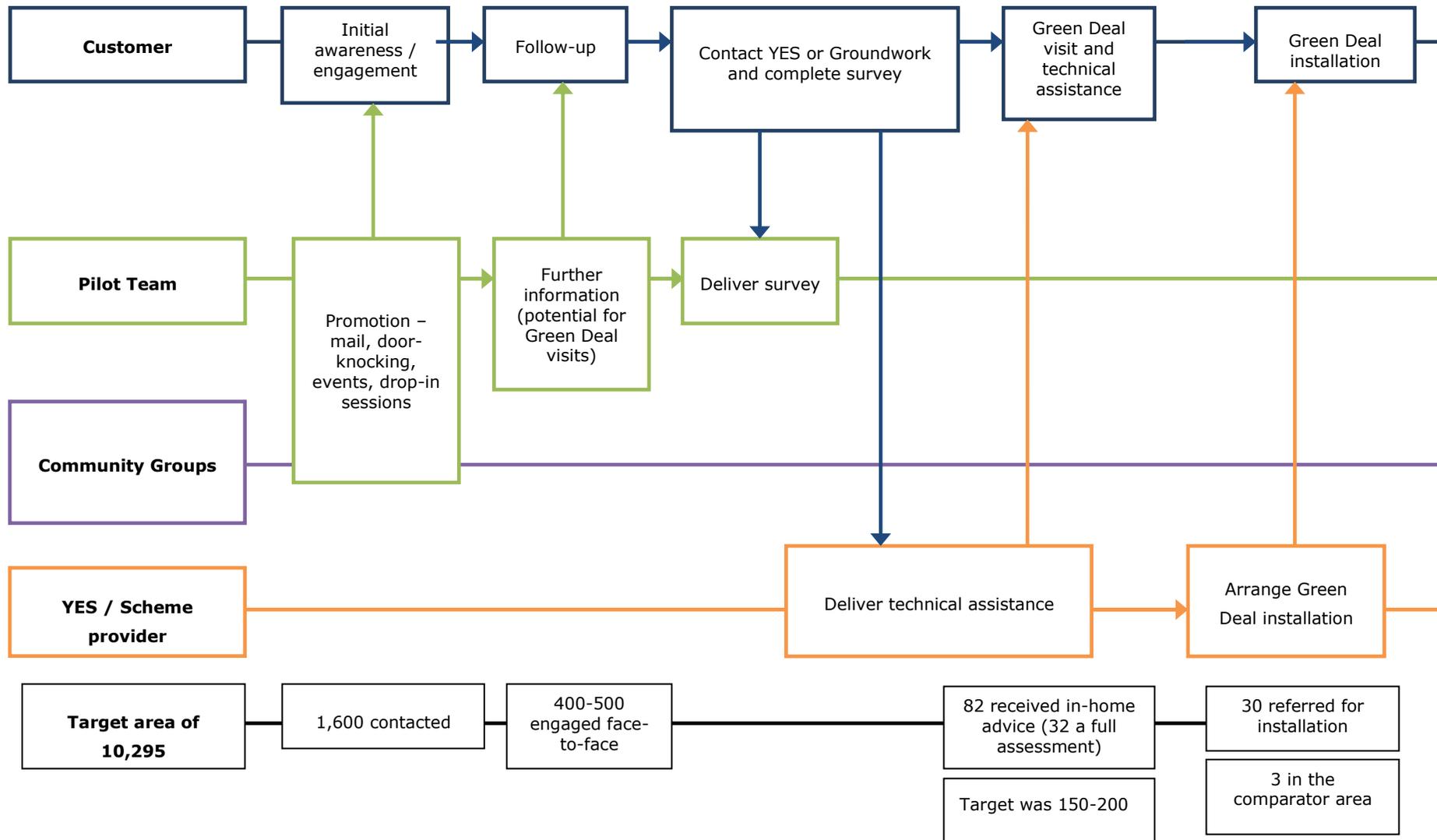
### 5.1.4 Cornwall

The Cornwall scheme tested approaches to take up of a local solid wall insulation scheme.



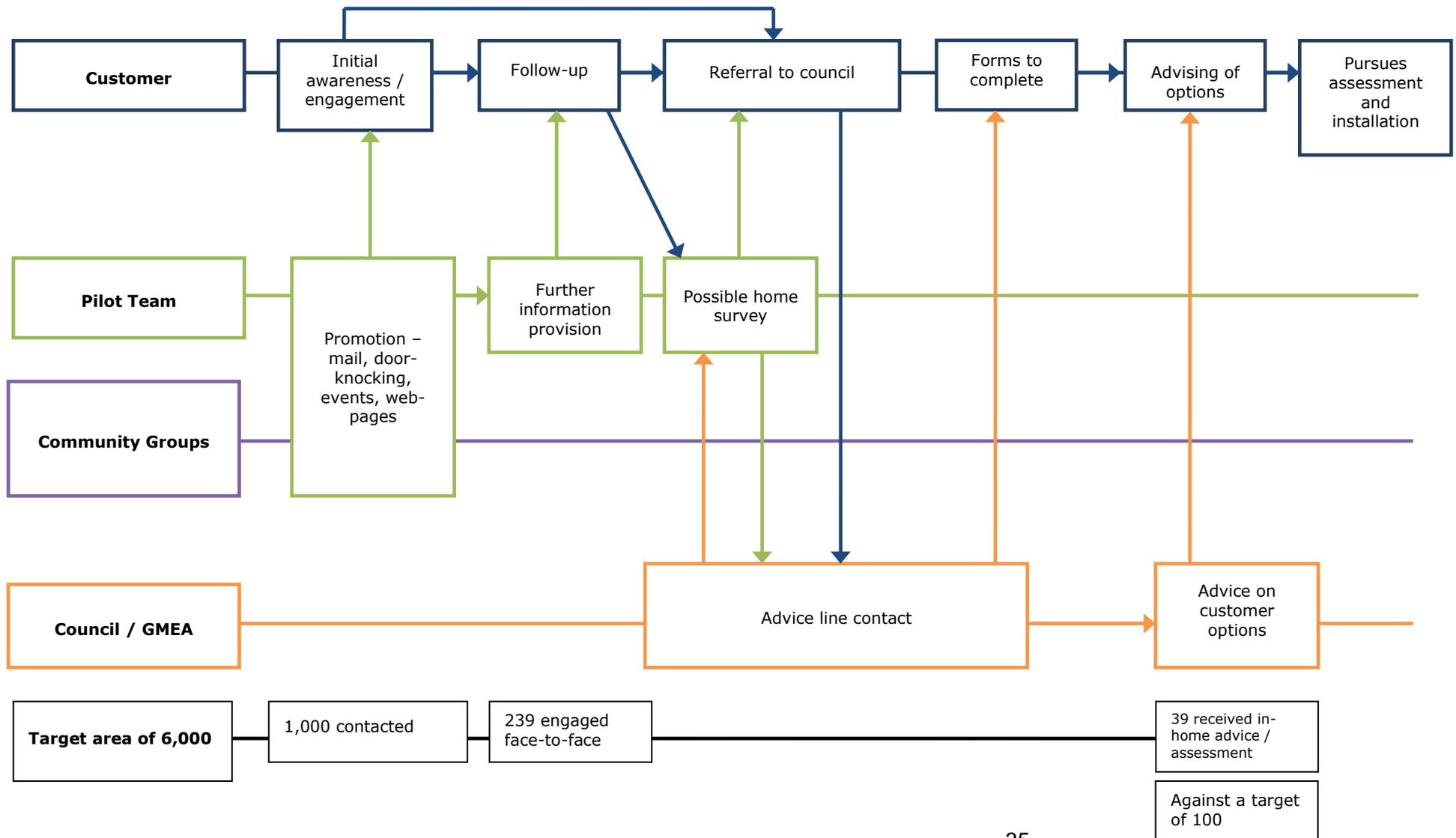
### 5.1.5 Leeds

The Leeds scheme tested approaches to encourage sign up to a council-led scheme.



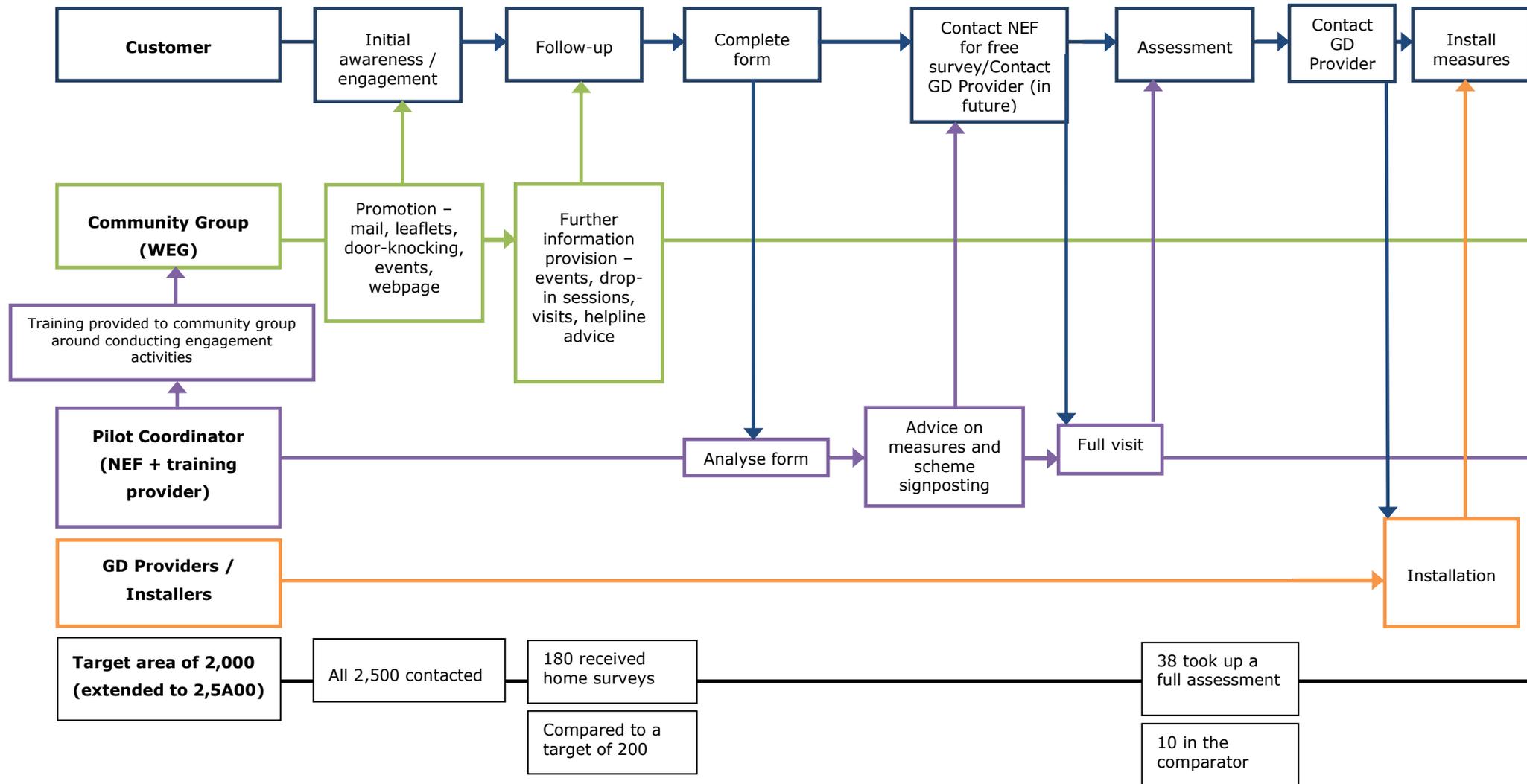
### 5.1.6 Manchester

The Manchester scheme tested approaches to encourage sign up to a local home energy loan scheme (HELP).



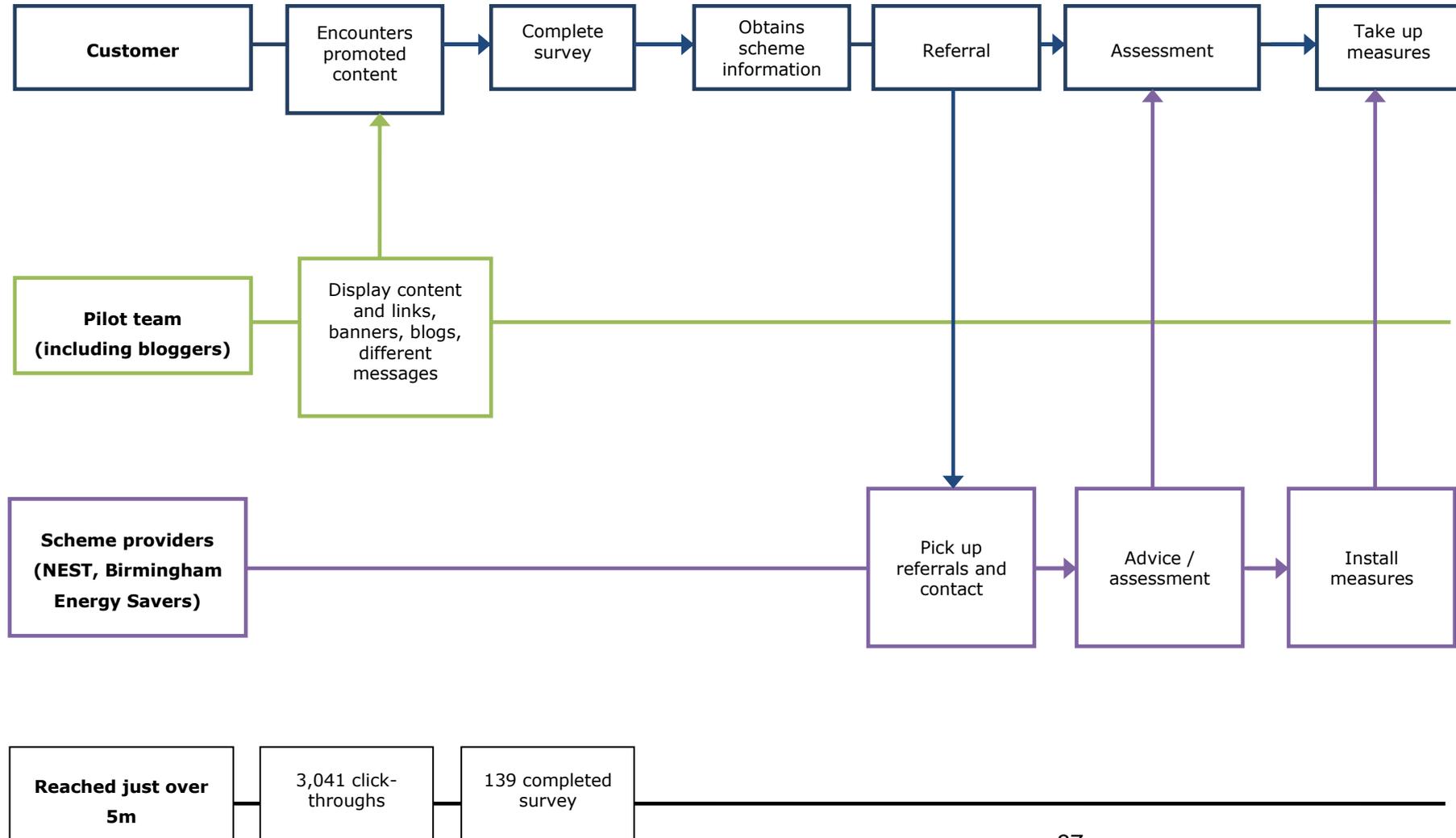
### 5.1.7 Milton Keynes

The Milton Keynes scheme tested approaches to encourage sign up to a Green Deal assessment.



### 5.1.8 Online

The online scheme tested approaches to encourage sign up to schemes including the Welsh NEST scheme and Birmingham Energy Savers.



## 5.2 Cost effectiveness

There was limited data available on which to undertake cost effectiveness assessment<sup>47</sup>, as the six pilots differed in the way they undertook community engagement activities. Nevertheless, it was possible to assess:

- overall costs per householder engaged<sup>48</sup> for the pilot studies.
- marketing 'reach'<sup>49</sup> for the online study.

**Table 5: Costs per householder engaged – Local Pilots**

Pilot	Cost effectiveness (£/household)				Types of engagement
	Pilot cost	Households in target area	Householders reached	£/Household engaged <sup>50</sup>	
Bridgend	£30,000	2868	1421	£20	Householders attending events, receiving a leaflet, receiving an email, receiving door-to-door marketing, seeing scheme promotions on social media, seeing posters and the promotional pink bird boxes.
Bristol	£22,300	9905	5250	£5	Householders attending the stands at events, receiving direct mail / leaflets, viewing posters or promotional material on BEG website.
Cornwall	£30,000	606	606	£50	Householders receiving direct mail / flyers, people receiving targeted door knocking or home advice visits, and people attending events.
Leeds	£30,000	10,295	1600	£20	Householders receiving mail, receiving door to door canvassing, or encountering promotional activities at local events and hubs.
Manchester	£30,000	6000	1000	£30	Householders visiting the Groundwork webpages on the pilot, receiving direct mail, receiving door-step visits, to 400, attending "Green Doctor surgeries" or presentations at community events.
Milton Keynes	£30,038	2000	2500	£10	Householders visiting the community group website, receiving a leaflet in the Parish newsletter, receiving a home energy doorstep survey, or attending a community-organised "Energy Show".

<sup>47</sup> For example, disaggregation of costs by particular engagement activity (e.g. events, door-knocking etc.) was not possible, as the way in which pilots recorded this data did not allow for this.

<sup>48</sup> See table 3 for details of how engagement is defined for each of the pilots.

<sup>49</sup> See glossary for definition.

<sup>50</sup> As householders engaged are estimated, figures have been rounded to the nearest £5.

**Error! Reference source not found.** shows the cost effectiveness figures for householders engaged through each of the pilots. This shows that the cost ranged between £4 and £50 per householder engaged. Whilst this provides an understanding of cost effectiveness, the small scale of each pilots and range of objectives being delivered against, means the figures should be viewed with caution. Furthermore, it is important to note that **to make direct comparisons between individual pilots would be misleading** as they took different combinations of approaches (e.g. door knocking, events and mailings, as detailed in the table).

There is very limited data available in the public domain which allows comparisons to be made between the pilots and other similar activities such as commercial schemes<sup>51</sup>. However, one study does provide some useful information. In 2006/07, the Energy Saving Trust managed a network of local Energy Efficiency Advice Centres (EEAC's) across the UK on behalf of Government. An evaluation of the service reported its cost effectiveness of customer reach as being **£8.90 per customer**<sup>52</sup>. This is a comparable figure, but it is worth noting that the Energy Saving Trust's activities of 'reach' mainly included telephone advice and direct engagement at events (i.e. direct mail and leafleting was not included).

**Table 6: Online pilot 'reach' cost effectiveness**

Cost effectiveness (£/person)		
Pilot	£/person	Definition of 'Reach'
On-line	£00.02 (£31 per click through)	Householders viewing pages on which a click-through link was provided i.e. page 'impressions'.

**Error! Reference source not found.** provides an overview of the cost effectiveness of the online pilot, which estimated to have achieved an online reach of 5 million people and 3,041 'click throughs' to the website, therefore achieving 0.06% conversion rate. This is close to the UK average click through rate (0.07%<sup>53</sup>).

<sup>51</sup> Such as those managed by UK energy suppliers under the Carbon Emissions Reduction Target (CERT) and Energy Companies Obligation (ECO).

<sup>52</sup> Changing Energy Behaviour: [Guidelines for Behavioural Change Programmes](#). An evaluation of Energy Behavioural Change Guidelines (BEHAVE) 2009.

<sup>53</sup> [Smart Insights](#) display advertising click through rates.

# 6 Factors affecting the success

## 6.1 Known barriers to uptake of energy efficient measures

Known barriers about uptake of energy efficient measures in households affected pilots in terms of:

- **household eligibility for measures** – particularly, where there was
  - less knowledge about the areas being targeted i.e. types of property; and socio-economic information about householder measures already installed;
  - availability or eligibility restrictions of schemes.
- **householder reservations** about:
  - cost of measures (and uptake of finance);
  - disruption caused by measure installation.

These were reported to be the main reasons why householders dropped out from the pilots at the initial engagement stage.

The pilots' focus on intensive measures; is also likely to have negatively affected uptake, because of their higher costs and installation requirements.

### 6.1.1 Eligibility of measures

**Determining eligibility of the target area:** All of the six 'local' pilots reported undertaking some activity during the design phase to determine the eligibility for measures within their target area (property type, occupant tenure and historic installations). The majority of the pilots relied on local knowledge to inform their approaches, for example in Milton Keynes, several of the community group volunteers lived in the streets to be targeted (Wolverton) and therefore had detailed knowledge about the neighbourhood and the types of energy issues faced by the properties as they were all of a similar type.

Only one pilot (Manchester) reported proactively using a local data source<sup>54</sup> to determine eligibility; they worked with the Local Authority's database to identify where to target. However, respondents claimed the information was out of date.

During delivery, eligibility for schemes was reported as a significant issue affecting take up. Reported challenges included:

- properties having already been targeted or treated for measures, reported by all pilot leads as affecting delivery;
- challenges determining whether properties were actually eligible (e.g. whether they were solid walled – Cornwall).

**Availability or eligibility restrictions of schemes:** Pilots also reported facing challenges with regards to:

- **availability of schemes** – For example, in Milton Keynes the Green Deal provider partner was not ready at the time of the pilot, and in Bristol the BHEU scheme came to an end during delivery<sup>55</sup>.

<sup>54</sup> The UNO database, managed by the Local Authority.

<sup>55</sup> BEG's activity after the closure focused on continuing to make referrals to CSE (but only for phone advice).

- **eligibility for schemes** – in Bridgend, a large proportion of the households in the target area were private renters of whom, many were nervous about signing up to measures which would affect the fabric of the property. The pilot tried to engaged landlords to help with this (through working with local real estate agents), but to limited effect.

### 6.1.2 Reservations about measures, including costs and installation

All of the local pilots reported facing challenges in getting sign up for measures, based on concerns about their costs (and associated finance requirements, where necessary) and hassle of installation. Specific examples include:

- in Milton Keynes, the community group reported householder reservations around the finance rates available under the Green Deal, which put them off taking it up;
- in Cornwall, some householders reported not wanting external wall insulation (despite it being offered, fully funded) on the basis that it would change the look of the property.

## 6.2 CEEOP timescales/timing

While pilots achieved substantial levels of sign-up, all pilot leads felt that more could have been achieved with more time. Some respondents also reported that the timing of the pilots was unfortunate as many local and national schemes were not available at that time. Those which had existing relationships with schemes and focussed on activities which secured direct householder engagement quickly (e.g. door-knocking) were less affected.

Each of the pilot leads cited timescales as a challenge from the outset. Their views were that:

- the short timescales required swift design of schemes, creation of materials and sign off of materials. This was particularly challenging for those where this had not been done before as they did not have previous knowledge;
- it was felt that time constraints particularly affected the pilot's ability to develop local relationships and promote messages enough to maximise take up. This was a particular issue where the schemes involved:
  - relationships with new schemes and scheme managers;
  - intensive measures (e.g. solid wall insulation) – which require more effort to secure interest and uptake, and;
  - a greater number of partners (e.g. community groups, support organisations and schemes).
- the time of year when the activity was taking place, which was reported to be before Green Deal was fully available, and when other energy efficiency schemes were being changed (e.g. due to changes in energy supplier obligations<sup>56</sup>). This meant that many schemes were not available in the market at this time.
- the timescales available determined some of the messages and activities used, for example:

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<sup>56</sup> Such as the Carbon Emissions Reduction Target (CERT) Community Energy Savings Programme (CESP) and Energy Companies Obligation (ECO). Whilst there was no gap between the start and end of policies, the changes energy suppliers and their providers had to put in place due to the differences between the schemes, meant that there was a gap in scheme availability reported by respondents.

- open homes events - were rejected due to the time available. One pilot lead felt that seeing measures installed in neighbouring homes is likely to create a cascade of interest within the local community, but the timescales for the pilot restricted testing that approach;
- another pilot (Bristol) used existing engagement materials and messages for the pilot to save time.

Despite this, pilots achieved substantial levels of sign up, referrals and in some cases actual installations.

### 6.3 Customer journey length and complexity

**Customer journey length and complexity:** Pilots with

- fewer, simpler steps in the customer journey tended to achieve greater interest and uptake;
- steps in the journey, which were customer-led (e.g. telephoning a scheme, or installation company) had particularly high drop off rates;
- flexibility in delivery led to potential efficiencies (e.g. skipping steps, such as general in-home advice) when a householder was clearly interested in a specific measure.

**Simpler customer journeys with fewer steps, tended to achieve more interest and activity and vice versa:** In pilots where the customer journey was relatively short and simple (in terms of numbers of stages and the number of customer facing partners involved) a higher number of customer sign ups tended to be achieved. The Cornwall pilot provides a good example of this, where the whole customer journey was largely managed by the project lead and managed to progress five actual installations within the timeframe.

Conversely, pilot customer journeys which comprised a greater number of stages, increased the risk of delays and drop out. For example, several pilots sought to secure customer engagement, followed by agreement to a home assessment in order to then be referred to a scheme. While there were often good reasons for this activity (e.g. ensuring a customer was truly interested and willing to act, before referral), this also provided more opportunities for customer drop out.

**Customer journeys, which required proactive action from householders had higher dropout rates:** Some customer journeys required proactive action from the householder at a particular stage e.g. to organise a home visit or sign up. For example, in Bristol, advice was available from CSE where needed but the latter stages of the journey were largely customer-led (mainly as a result of the termination of the BHEU scheme due to funding issues). This led to high drop off rates from those initially engaged.

**Flexibility in delivery:** During delivery, some pilots identified shorter routes to getting customers signing up for measures by either skipping specific stages of the customer journey or simplifying the customer journey. The Bridgend pilot provides a good example of this, where they found that referrals could be made earlier (e.g. at first engagement, cutting out the need for follow up advice).

## 6.4 Influence of the wider market

**Wider market influences (e.g. national schemes)** affected pilots by

- reducing householder interest, due to previous targeting (e.g. by commercial providers);
- requiring significant promotional effort on the part of the pilot to make them stand out.

Knowledge of this led some pilots to test new and innovative approaches and were reported by pilots and householders to have been largely successful.

At the time the pilots were delivered, there were a number of changes occurring to the market for energy efficiency measures, such as the launch of the Green Deal. Three pilot leads highlighted that multiple schemes and providers were operating in the pilot areas at the time of the pilots being delivered. They felt this affected pilot success in a number of ways, including:

- householders having been targeted previously and so were less likely to be interested in the offers available through the CEEOP pilots. For example, the Manchester pilot found it challenging to get householders to answer the door as there had been a lot of door-to-door loft and cavity wall insulation schemes being promoted in the area ;
- challenges in getting householders to attend events (also exacerbated by some of the local weather conditions);
- time and resource being spent trying to differentiate the pilot offer in customers' minds and make it stand out. This led to some innovative approaches being taken, such as film nights (Bristol) and outdoor 'viral' campaigns (Bridgend – pink bird boxes) and neighbour-to-neighbour door stepping (Milton Keynes), which were reported to have been significantly more successful than more traditional routes of engagement.

The online pilot lead reported a different effect, and due to the nature of the intervention, it was not possible to isolate where the pilot activity itself – as opposed to other activities – had influenced householder interest.

*“It’s difficult to know when someone clicks on a link, if they have done so solely due to the online pilot articles or because they also saw a message from somewhere else.”* (Online pilot project lead).

This also affected use of partners for the online pilot as a number of the websites targeted for inclusion in the pilot wouldn't host articles because they were already talking about the Green Deal.

## 6.5 Being established in the local area

Being established in the local area with existing networks, contacts and experience of energy efficiency (and the associated reputational advantage) were all felt to be crucial to the design, delivery and take up within the pilots.

Being established in the area was felt to be integral to pilot success for a number of reasons:

- **local knowledge**; which ensured that an appropriate energy efficiency scheme was chosen for promotion and that an area appropriate for the scheme (i.e. one with a sizeable proportion of eligible households) was selected. The estate in Cornwall was targeted as a good proportion of the housing was appropriate for solid wall insulation. In addition, local knowledge was crucial in ensuring selection of an appropriate comparator area;
- **local reputation with the community**; which helped in engaging those who would otherwise have been harder to engage;
- **having existing contacts and networks**; which ensured that:
  - an appropriate (often local) scheme could be identified and engaged, e.g. BHEU in Bristol;
  - other local partners could be brought in to assist with activities, such as in Bridgend, where local councillors were engaged to promote the scheme to residents in the local area.

## 6.6 Partner involvement

**Working with partners (e.g. local authorities, scheme managers and installers)** affected pilots positively by:

- providing endorsement, which was felt to be helpful to legitimising schemes with householders (e.g. local authority involvement had this effect);
- acting as a conduit to community engagement (e.g. local schools, libraries and community networks).

However, in some instances, partners had a negative effect, such as:

- slowing planning stages, by requiring input into pilot design;
- constraining delivery; for example, lack of availability of local schemes constrained delivery. In one pilot (Bristol), the scheme was closed during delivery of the pilot, thereby removing the main fulfilment mechanism.

All of the pilots worked with additional partners (outside of their 'core' teams) to deliver the schemes, including local authorities, scheme managers, community groups (outside of core partnerships), training providers and other organisations.

**Benefits of partner involvement:** In the majority of cases, these partnerships facilitated delivery (e.g. such as organising installation of measures). These partnerships involved:

- **local authorities:** The Leeds and Manchester pilots worked directly with local authority funded schemes. In addition to providing the necessary fulfilment for the pilots, pilot leads felt that the involvement of local authorities was useful to help legitimise the

scheme for householders, on the basis that the local authority brand was associated with it. Manchester local authority also got involved in providing targeting data to ensure the pilot was delivered where there was a significant need / opportunity;

- scheme managers:
  - the Bridgend scheme worked with NEST to ensure it was possible to track the progress of referrals made from the pilot into the national scheme;
  - the online pilot worked with several schemes (e.g. NEST and Birmingham Energy Savers) to provide fulfilment options for householders signing up.

**However, there were challenges arising from partnership involvement** as well. These included:

- confusion about roles and responsibilities: One pilot lead commented that the involvement of a number of organisations could lead to lack of clarity as to who was leading and driving which decisions and pilot elements. One of the advantages noted by the online pilot team was that they could change pilot messages or channels without delay (and the need to involve other organisations / decision makers) i.e. responsibilities were clear.
- other issues included unnecessary delays caused by numerous requests - In particular cases (e.g. where the scheme worked closely with local authority schemes and relied on their resources), local authorities asked for input into scheme design, such as choosing target areas, messages etc. which had benefits, but also slowed pilot development.

*“... the Council have a vested interest in ensuring the pilot ‘fits’ with and enhances current activity... They are a partner whose views need to be taken into account and can slow pilot progress whilst waiting for information, decisions or approval of materials.”*  
(Pilot lead).

- unforeseen circumstances or issues: The activities of scheme managers had a direct impact on some pilots. For example in Bristol, the BHEU scheme was terminated mid-way through pilot delivery. The decision reduced the ability of the team to engage householders with a compelling call to action and required some re-working of messages and promotional content.
- operational issues: On the Bridgend pilot, the process by which the NEST scheme was operated, which led to the need to refer participants into the scheme more than once<sup>57</sup>, which took extra time and reduced householder satisfaction.

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<sup>57</sup> If householders referred into the scheme did not answer the telephone after three call they were removed from the database.,

## 6.7 Working with community groups

**Working with community groups within the pilots** (Milton Keynes, Bristol and the online pilot) were reported to have positively affected pilots by:

- tapping into existing community networks;
- providing a trusted voice, which helped improve
  - referral conversion rates;
  - access to engaging / the ability to engage otherwise hard to reach parts of the community;
- providing a network of enthusiastic volunteer resource;
- increasing chances of self-sustaining pilots after funding ends.

The community groups also reported benefiting from professional support to help pilot design and delivery fulfilment (e.g. producing materials, referral and reporting mechanisms etc.). Some of these benefits were also reported through the pilots delivered by community support organisations, so it is not possible to say that these benefits are exclusive to community groups.

There were also a number of challenges associated with working with community groups, including:

- ensuring pilot design 'fits' with the groups aims and objectives, so that the community group are comfortable to fully endorse the pilot;
- allowing appropriate time and resources to allow the groups to input into pilot design, such that it was felt to be 'owned/controlled' by them;
- providing appropriate training and fulfilment mechanisms e.g. financial rewards for the time of volunteers;
- developing appropriate incentives/remuneration for the groups, which does not compromise their reputation;
- ensuring delivery can be supported within the timescales, particularly when relying on volunteer action.

## 6.7.1 Benefits of community group involvement

**Milton Keynes – mini case study:** The National Energy Foundation (NEF) worked with the Wolverton Energy Group (WEG) to test the delivery of a community group-led energy efficiency scheme, designed to improve the energy efficiency of hard to treat housing in Wolverton. NEF asked WEG to work with them on the basis that they brought; a team of committed local leaders and volunteers, excellent knowledge of the local area, influence with the wider community through their networks and also a significant track record in delivering energy projects. NEF provided funding, co-ordination and professional support to help deliver on the ground.

One of the pilot's key targets was to deliver 200 'door-step' energy assessments, which would lead to referral onto a full green deal assessment at a later date. The WEG volunteers delivered the majority of these through targeting their neighbours in an innovative 'neighbour-to-neighbour' engagement approach.

During delivery, the volunteer team was assisted by a contractor to help delivery against their challenging target. This allowed for a direct comparison to be made between those delivered by the group and those delivered by the contractor.

**Table 7: Milton Keynes pilot door-step assessments comparison of delivery**

Delivery route	Total Number of door step surveys	Conversion rate to full assessments (%)
Door step Surveys carried out by WEG	80	21%
Door step Surveys carried out by private contractor	100	5%
<b>Total</b>	<b>180</b>	<b>12%*</b>

Table 7 shows that the WEG volunteers delivered a significantly higher conversion rate to full green deal assessments. The project leads attributed this to WEG's existing influence, trust and networks within in the community.

\* = 12% is calculated based on 22 assessments undertaken subsequent to 180 doorstep surveys.

The benefits of the involvement of community groups across the community led pilots included:

- tapping into existing community networks – the Bristol Energy Group had access to a network of householders who had shown interest in previous projects, which they targeted within their pilot;
- providing a trusted voice, which helped improve:
  - referral conversion rates;
  - access to engaging otherwise hard to reach parts of the community.

For the online pilot, promoting the messages through online communities and champions was felt to add value through these forums being trusted:

*“there is distrust of some government messages, and more trust in real people’s opinions which are provided by the bloggers. NetMums has user generated content, and has real tips, not just sales messages. People who go to these blogs and website trust it. They consider themselves connected to the other users of the site.”* (Online pilot lead).

Several of the householders engaged through these pilots reported that it was important to them that the scheme was run by a community group.

*“I like them as they’re a local group and they’re enthusiastic and supportive....I probably took more notice as they were a local community group...I don’t think I’d take a private company seriously as I’d be wary of their intentions whereas a local community group at a market is fine as you know they’re independent. I probably would’ve walked past if it had been British Gas or someone like that. It being a local group like that makes me think I’ll give them a bit longer.”* (Householder, Bristol pilot)

Other reported benefits included:

- providing a network of enthusiastic volunteer resource at low cost. Many of the volunteers provided their time for the delivery activities for free. In fact the community lead felt that it would be *“against the group’s principles to be directly paid”* for the activities they undertook; increasing chances of self-sustaining pilots after funding ends as the group would continue to deliver related projects in the area after the funding had ceased. Both groups leading community-led pilots reported that they would be undertaking future activities, with or without central Government funding.

### 6.7.2 Challenges arising from community group involvement

There were also a number of challenges which arose from community group involvement in the pilots.

- **ensuring pilot design ‘fits’ with the groups aims and objectives:** One of the community group leads reported that their group was set up a number of years ago and had developed a strategy and objectives, which were tailored to the goals and aspirations of their members and the needs of the local community. If these were not aligned with the needs of the pilot, then it would have been difficult to gain the full support of the group.

*“Some of us are not clear on, and not convinced by aspects of national policies. We will therefore provide our own views to our community with regards to these, which may not sit in line with Government policy.”* (Community group lead).

- **allowing appropriate time and resources for the groups to input into pilot design:** In addition to fitting with local group priorities, both community group leads of community group-led pilots were keen to have time and resources to input into the design of the pilot and to tailor it to their understanding of the community’s needs. It was recognised by both groups that the professional support provided was crucial to ensure delivery within the timescales available.

- **providing appropriate training and fulfilment mechanisms for volunteers:** Training was necessary on both the Bristol and Milton Keynes pilots to build volunteer skills in door-knocking, explaining the schemes and generating leads. This required resources and in Milton Keynes was not felt to have catered effectively for volunteer's needs.

*“The training was geared towards computer-savvy students, whereas the group of volunteers were mainly retirees, who did not know what an iPad was!”*. (Community group lead).

- **ensuring delivery can be supported within the timescales, particularly when relying on volunteer action:** Particular activities delivered by volunteers (e.g. door knocking) suffered during poor weather conditions, which led to the decision to bring in a provider to help deliver targets in Milton Keynes.
- **developing appropriate incentives/remuneration for the groups, which does not compromise their reputation:** Incentives were considered to be necessary by both group leads for this type of project, but the way in which this is provided needs consideration and care to ensure that the trusted relationship between the group and the community is not compromised. For example, referral fees could be provided, but would be more appropriate to go into a central pot, from which the whole community benefits (suggested by one of the community group leads).

# 7 Community engagement

## 7.1 Effectiveness of approaches

As engagement approaches were used in combination, it is challenging to report conclusively on the efficacy of individual approaches. However, in general, the evaluation found that:

- securing initial interest was the most challenging aspect of community engagement, which is reflected in the observed ‘drop-out’ rates in the early stages of the customer journeys, which ranged from 0.2% to 5% (initial engagement to referral, see Table 4 for further details). Several pilots opted to undertake door-to-door targeting in order to ensure they engaged with householders direct. For example, the Cornwall pilot lead reported that this appeared to be the only option to get significant numbers of respondents to take forward measures within the timescales available;
- however, once an ‘interested’ household had been secured, getting them to take up in-depth advice and/or be referred to a scheme was easier, although (due to the timescales of the CEEOP / this evaluation) little is known about how effective conversion to actual measure installation was. Several of the pilots show encouraging conversion rates ranging from 7% - 48% (in-depth advice to referral, see Table 4 for further details) between pilots in a position to measure this;
- responses to messages appeared to be affected by income group – in general, warmth and fuel bill savings were reported to be more compelling with low income groups and environmental messages appeared to be just as or more effective with higher income groups.

### 7.1.1 Mailings and leafleting approaches

Mailings and leafleting approaches were found to be:

- more effective, when highly targeted – i.e. sent to householders known to be interested, with messages relevant to their situation. This was linked to the pilot leads existing networks. For example, the Bristol pilot engaged households previously engaged through the LEAF project who they knew had an interest in having measures installed on their homes. Leeds also undertook targeted mailings and reported some response direct from this; the pilots show examples of this working well with an audience, which was urban and higher income (e.g. Bristol pilot) and a more rural and lower income audience (e.g. Bridgend pilot);
- less effective, when they were general mail-shots or leaflets to a less well known audience. Several pilots used this approach as part of their activities and did not report them being effective in their own right; however they were seen as an important precursor to follow up activities, such as door-to-door targeting. The Cornwall pilot reported receiving only one follow up call from their direct mailing activities, despite an attractive offer being promoted (fully funded solid wall insulation);
- in addition, the effectiveness of these approaches were felt to be affected by:
  - the branding used – e.g. that of the community group or organisation. There is little quantitative evidence to directly support this, but the Bridgend pilot did report

a slightly higher uptake of mailings than the national campaign at 4.8% (vs. 4.2%)<sup>58</sup>;

- specific messaging, such as call to actions or offers of free or low cost measures. The online pilot reported that they felt their targeting would have been more effective if they had had more specific schemes or offers to promote directly, as opposed to providing a generic referral, which required filling in of forms.

### 7.1.2 Events

Events were used in different ways including:

- events arranged and promoted specifically about the scheme – which were felt to be effective in signing up householders. However, securing attendance was challenging (Manchester and Cornwall both tried ‘drop-ins’ or ‘surgeries’ and had low attendance. Some pilots decided to rule out the use of specific events for this reason).
- one pilot lead (Milton Keynes) felt that their event, which included attendance from scheme managers and installers was more effective than other routes, as it allowed attendees to discuss the different stages of the process in one place, at one time.

*“this enabled householders to discuss all stages of the process in one place at one time and lead to direct referrals for assessments.”* (Community group lead)

This was corroborated by later finding that the a significant proportion of their green deal assessment referrals had come from the event.

- having a presence at an existing event – helped guarantee attendance and had the ability to engage a wider audience, including those who were likely to be harder to engage through other routes. However, these types of events may have been less effective in securing actual uptake.
- one householder who was engaged through a market stall felt that it was a useful way to be targeted as it was less intrusive than other means;

*“it was a nice way of promoting because they had some draught excluders and freebies to attract people. Visitors to the market stall could embark in general energy saving conversation that wasn't too ‘in your face’. The scheme was then introduced casually.”* (Householder, Bristol)

All events were negatively affected by adverse weather conditions and limited timescales available for planning and promotion. This was felt to be a particular problem when pilots had put a lot of effort into ‘one-off’ events, and they had to quickly develop alternative targeting activities to make up for ‘lost’ referrals.

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<sup>58</sup> The Bridgend pilot used different branding to the national scheme.

### 7.1.3 Door-stepping/ in home advice

Door-stepping/ in home advice was found to be:

- more effective when:
  - targeting a 'warm' (i.e. interested) audience and done through trusted local peers. For example, as shown in section 4.2.2, the 'neighbour-to-neighbour' door stepping approach used by Milton Keynes resulted in a sign up rate four times<sup>59</sup> higher than the professional door-stepping company working in the same streets (hired to boost numbers);
  - used further down the customer journey – e.g. a pre-arranged 'green doctor' visit which was reported to be valuable in both providing detailed and specific advice, and identifying appropriate measures which could be discussed and then referred.
- less effective when:
  - used as an initial engagement mechanism (i.e. going in 'cold') as householders often turned the offer down. The approach was also resource intensive. Additionally, where done by community group volunteers, this also had a detrimental effect on group morale when they sometimes received a negative reception from local neighbours (Milton Keynes).

### 7.1.4 Messaging

Several types of messaging were used through the pilots, and were reported as underpinning the overall success of their engagement approaches. These were reported to be more effective when:

- they were specifically tailored to the audiences being targeted – i.e. specific to household, property and tenure types (e.g. Bristol, Leeds);
- they promoted the benefits of action – here:
  - warmth and fuel bill savings were reported to be more compelling with lower income groups – for example, all the householders responding to the survey from the Bridgend pilot reported these were the reasons why they took up the scheme. Conversely, environmental messages appeared to be just as or more effective with higher income groups (e.g. Milton Keynes);
  - the online pilot appeared to show environmental messages achieving more click throughs, although less is known about the relative use of different messages (as this was in the control of community forum leads and bloggers);
- householders were clear about what was being promoted and what was required of them. Householders reported feeling more comfortable entering into a discussion when the purpose was clear (e.g. an installation). In addition, moving through customer journey stages was reported to be greater and more effective when the householder had a clear understanding of the next steps in the process. Householders responding to the Leeds pilot reported feeling like they were *“part of a scheme, which was going somewhere”*. They reported feeling as though:

*“they were aware of what was going on throughout and what ultimately would be achieved as a result.”* (Householder).

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<sup>59</sup> 21% successful referral to green deal assessment vs. 5%, although the contractor was undertaking activity after the community group, over less time and in (slightly) less favourable streets.

## 8 Lessons learned

The evaluation sought to determine the key lessons learned from the pilots, which are detailed below. The lessons learned are derived from a synthesis of data and insights collected from the pilot project leads, monitoring information and householder interviews.

The main lessons from the pilots were:

**Timescales:** If timescales for delivery are short, schemes are more likely to succeed in securing interest and uptake if:

- they are focussed on cost effective 'simpler' measures, such as cavity wall and loft insulation;
- there are a limited numbers of partners involved in delivery.

In addition, those which utilise engagement approaches that are not developed from scratch (e.g. piggy backing on existing events) were felt to be more successful.

More time should be allowed if schemes are required to focus on intensive measures and/or there are a number of partners involved (e.g. community groups, community support organisations and scheme managers). Finally, consideration of how a project's timings will fit with the lifecycle and timings of energy efficiency schemes is also important.

**Customer journey:** Within the timescales for the pilots, those with simpler customer journeys (i.e. fewer steps), involving fewer partners who had direct experience of delivering schemes were more likely to succeed. Stages where customers are left alone to complete progression should be avoided where possible.

In addition, choice of measure(s) delivered by the schemes being promoted is also likely to affect take up as more intensive measures require more investment of time and money both for the scheme and the householder.

Finally, future pilots or schemes would benefit from developing schemes with simple, flexible customer journeys, which 'hand-hold' householders through the steps.

**Drivers and barriers to success:** There are many drivers and barriers to success in delivering community level interventions, which vary according to type of scheme, location and audience. However, in general the most important drivers appear to be local knowledge, trust, and having a clear and available energy efficiency offer(s). The most important barriers appear to be securing householder interest through targeting and promotional activities and then not losing the householder once they have shown interest.

**Working with community groups:** There are a number of potentially significant benefits associated with community groups leading or being involved with the promotion of schemes (e.g. trust from the local community, local knowledge etc.). However, in order to maximise these benefits, the aims, objectives, structures and resources of the community groups need to be given consideration when designing schemes.

**Community engagement:** It is not possible to identify conclusively, which approaches to community engagement work with particular groups, locations or housing types. However, aspects which appear to be important include:

- the organisation(s) delivering the engagement activities should ideally have a pre-existing local presence and be a recognised and trusted brand;
- utilising local knowledge and networks to develop engaging messages which are relevant for the audience. Working with community groups can be effective in securing interest from parts of the community which would otherwise be hard to engage;
- using innovative approaches. Most householders have been targeted by previous schemes, so innovation should be encouraged to achieve cut through;
- tenure – private tenants in particular were challenging to engage due to the need to secure permission from landlords. To overcome this, one pilot attempted to engage landlords, but had limited response.

**Which messages and methods of engagement work best:** It is also not possible to identify conclusively which specific messages or methods of engagement work. However, aspects which appear to be important include:

- **engagement**
  - mailings can work well if the audience is known to be interested. It also can be a useful pre-cursor to other activities (e.g. door knocking);
  - events can be very effective if an interested audience attends and particularly if the opportunity is used to inform householders of the full customer journey (e.g. meeting scheme managers, installers). In limited timescales, it was found that piggy-backing on existing events was more successful than developing new specific events;
  - door-knocking is resource intensive, and so could be more effective further down the customer journey i.e. when a householder is already known to be interested.
- **Messages**
  - saving money and keeping warm – appears to work well for all, and particularly for lower income groups;
  - where there are other current - or recent - retrofit schemes and promotional activity in an area, making a scheme stand out and overcoming resident fatigue with the various offers can be challenging. Use of innovative marketing messages can be effective in overcoming this fatigue.

## 9 Appendix 1: Individual engagement methods by pilot

Pilot	Engagement methods deployed
Bridgend	<ul style="list-style-type: none"> <li>• Leaflets</li> <li>• Door-knocking</li> <li>• Community events and drop-in sessions – both pilot-focused and activity attached to other community events</li> <li>• Phone advice</li> <li>• Social media</li> <li>• Promotion through landlords and other third party contacts e.g. councillors</li> <li>• Awareness raising through placing bird-boxes around the area</li> </ul>
Bristol	<ul style="list-style-type: none"> <li>• Community events and drop-in sessions – both pilot-focused and activity attached to other community events; venues also held leaflets and referral forms</li> <li>3 BEG and CSE websites</li> <li>4 Radio/press</li> <li>5 Phone advice from CSE</li> <li>6 Personalised mail-shot to 268- residents previously involved in BEG's LEAF project.</li> <li>7 Leaflets and inserts</li> <li>8 Posters in nine local buildings</li> </ul>
Cornwall	<ul style="list-style-type: none"> <li>• Visits to local community groups to engage them as the hub</li> <li>• Direct mail of postcards</li> <li>• Community events and drop-in sessions – both pilot-focused and activity attached to other community events</li> <li>• Door-knocking</li> <li>• Radio/press</li> <li>• Flyers and posters</li> <li>• Home Visits</li> </ul>
Leeds	<ul style="list-style-type: none"> <li>• Direct mail</li> <li>• Door-knocking</li> <li>• Community events and drop-in sessions – both pilot-focused and activity attached to other community events</li> <li>• Green Doctor visits</li> </ul>

Manchester	<ul style="list-style-type: none"> <li>• Direct mail</li> <li>• Door-knocking</li> <li>• Community events and drop-in sessions – both pilot-focused and activity attached to other community events</li> <li>• Demonstration event</li> <li>• Webpage for the scheme</li> <li>• Helpline advice</li> </ul>
Milton Keynes	<ul style="list-style-type: none"> <li>• Leaflets</li> <li>• Website</li> <li>• Door-knocking</li> <li>• Community events and drop-in sessions – both pilot-focused and activity attached to other community events</li> </ul>
Online	<ul style="list-style-type: none"> <li>• Five different message types deployed in links and banners on a number of different web-pages and blogs</li> </ul>

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