



energywise

Engaging fuel poor and hard to reach households on energy initiatives

Lessons from recruitment, installation and ongoing engagement

"The field officer was brilliant, we were talking and laughing; he was lovely, understandable, understood my concerns, took on board my issues."
energywise participant

Welcome to the
energywise project

"Smart meters have really helped us to visualise what we are using."

"I'm on a pay as you go meter – it's great to see on the energy display how much energy I'm using and when I need to top up."
energywise participant

"energywise has really come at the right time; it's like a bonus thing; we're really pleased, it's really helpful!"
energywise participant

energywise

explores

- How Distribution Network Operators (DNOs) can support fuel poor customers and allow them to participate in energy saving and demand side response (DSR) opportunities;
- The best role DNOs can play in facilitating energy efficiency measures;
- How this can ultimately benefit DNOs both in shaping their engagement strategies and managing networks using flexible alternatives.

"What I enjoyed most... is that I learned when to operate various electrical devices to save energy."

"The project is absolutely great, the people are very good, there's nothing I'd want to change. Everything is explained properly. The best thing about it is the panel; I really like going to that!"
energywise participant

"I was nervous about coming to the panel, as I'm not someone who likes speaking out, but I enjoyed the process and am more confident about it now."
energywise participant

energywise has involved recruiting social housing tenants living in part of east London to take part in a trial involving smart meters, energy efficiency devices and a time of use tariff/rebate. This booklet outlines the achievements and lessons from the recruitment and installation phases of the project as well as the ongoing participant engagement.

Fuel poverty and the smart meter roll-out

Fuel poverty is a serious and complicated issue affecting householders (generally those on low incomes) who are struggling to pay their energy bills¹. In 2015, there were estimated to be around 2.5 million fuel poor households in England – 11 per cent of the total². There are three main drivers of fuel poverty: the cost of energy, the income of the household and the efficiency of the property.

Energy efficiency initiatives are key to reducing fuel poverty and smart meters have the potential to play a key role in enabling households to be more efficient. Smart meters form part of the UK Government's plan for upgrading Great Britain's energy system, and will lay the foundation for moving to a

lower carbon economy and a secure energy supply. The UK Government is committed to 'ensuring that every home and business in the country is offered a smart meter by 2020, delivered as cost effectively as possible'³. Smart meters send data directly to energy suppliers about the amount of energy a customer is using, thus negating the need for meter readings or estimated billing.

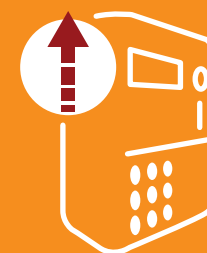
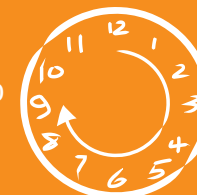
The smart meter rollout will see 53 million gas and electricity meters installed, involving visits to 30 million homes and small businesses. The take-up of smart meters is voluntary; customers have to willingly opt-in to have one installed. Fuel poor households may face barriers to realising smart meter benefits, yet could potentially benefit the most from this technology. In order for the smart meter roll-out to be successful, it is vital that it reaches all customers, including those who are vulnerable or low income.

Smart meter benefits to consumers

Smart energy monitor lets customers see how much energy they are using with **INCREASED CONTROL OVER ENERGY USE** giving predicted savings of 2-3%⁴



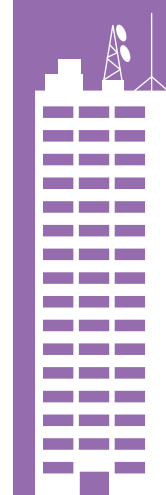
Facilitates access to a range of **TIME OF USE TARIFFS**



EASIER TOP-UP OPTIONS for prepay customers. Almost a quarter of fuel poor customers are on prepay meters⁵

Barriers to realising smart meter benefits⁶

Groups less likely to accept a smart meter include those **OVER 75 YEARS**, who **CANNOT SPEAK ENGLISH** well, or who have a **DISABILITY** such as being partially sighted or blind



Groups likely to have to wait longer to be offered a smart meter include those in **ENERGY DEBT** as well as those living in **HIGH RISE BUILDINGS** which are more challenging to fit smart meters in

¹ Fuel poverty in England is measured using the Low Income High Costs indicator, which considers a household to be fuel poor if their income is below the poverty line and their energy costs are higher than is typical for their household type.

² BEIS, 2017, Annual Fuel Poverty Statistics Report, 2017

³ DECC, 2015, Fourth annual progress report on the rollout of smart meters

⁴ DECC, 2014, Smart meter rollout for the domestic and small and medium non-domestic sectors (GB) Impact Assessment

⁵ 22% of prepay customers in England are fuel poor compared to 7% of direct debit customers; DECC, 2015, Annual Fuel Poverty Statistics Report 2015

⁶ Smart Energy GB, 2015, Smart energy for all; identifying audience characteristics that may act as additional barriers to realising the benefits of a smart meter

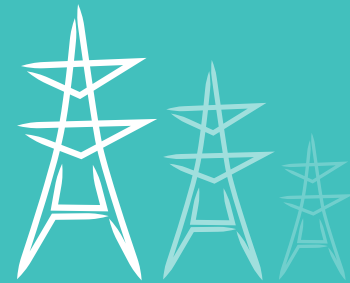
Importance of supporting vulnerable and fuel poor households

Smart meter rollout
COSTS ARE SHARED
by all energy consumers:
it is important that all
households benefit



VULNERABLE or **FUEL POOR** customers can benefit greatly from energy efficiency initiatives and the smart meter roll-out but often have limited ability to access energy saving technologies

Enabling and encouraging all customers to **REDUCE AND CHANGE THEIR PATTERN** of electricity demand will help mitigate the challenge of increasing and more uncertain demand on electricity networks



Introduction to energywise

energywise is a partnership between nine organisations, led by UK Power Networks, the electricity DNO for London, the south east and eastern parts of England. Ofgem awarded the project £3.3 million of funding (total project cost £5.5m) under the Low Carbon Network Fund competition in December 2013. The partners are working together to engage customers who may be fuel poor or vulnerable on energy use.

The project explores how low income households who may be struggling with fuel bills can better manage their

household energy usage. It involves two trials, as shown in the adjacent diagram. Upon signing up to the project, participants were randomly split into one of two groups:

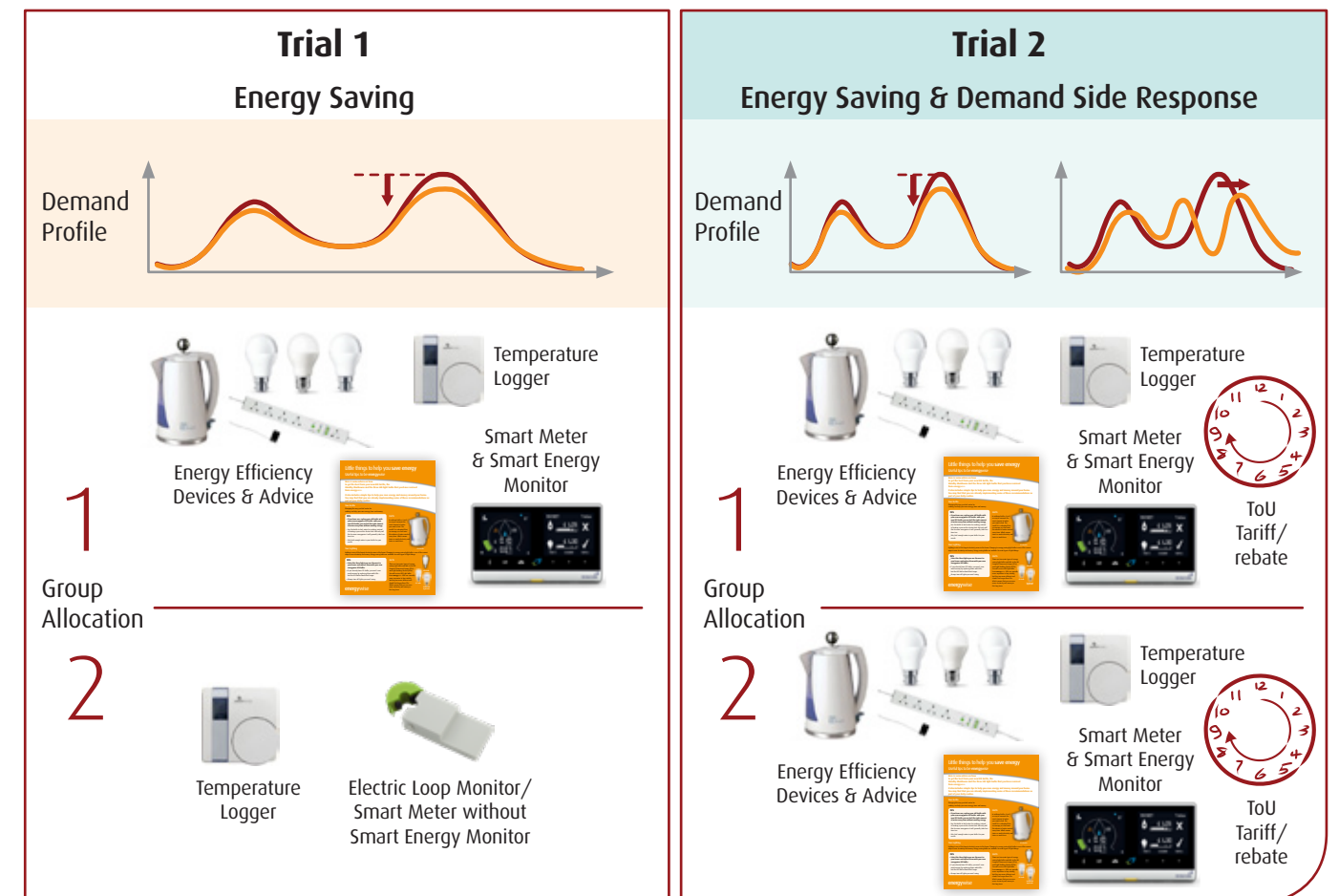
- The intervention group (group 1), who received their smart meter, smart energy monitor and devices at the start of trial 1, and are then offered a Time of Use (ToU) tariff before trial 2; or
- The control group (group 2), who will receive these items at the start of trial 2.

energywise partners

Participants have also had temperature monitoring equipment installed as a customer protection measure.



The project trials



energywise



innovation

Testing an innovative, collaborative approach between DNOs, energy suppliers and community members in engaging households on energy saving and DSR programme.

Trialling smart meter solutions, including prepayment smart meters, and time of use tariffs with fuel poor customers.

Demonstrating smart meter infrastructures for Multi-Dwelling Units, high rise buildings with difficult meter arrangements.

Exploring how a change in demand from these customers may benefit the electricity network.

Targeting hard to reach customers



energywise offers a flexible approach to engagement that can be tailored for different groups. This has been successful in recruiting participants that are considered hard to reach in the context of the smart meter rollout, including:

- Black or Minority Ethnic households which lack English as a first language;
- Elderly households which have been identified as hard to reach in terms of the smart meter rollout.

The outcomes from this project therefore have relevance both in terms of engaging with fuel poor households but also with hard to reach households. Given the diversity of Great Britain's population, an inclusive approach will support the Government's target to rollout smart meters by 2020.

One of the objectives of the **energywise** project was to recruit customers through working with trusted local intermediaries who have a good understanding of the local area and culture. The intention was to identify 1,650 eligible participants (British Gas customers who are also social tenants of Poplar HARCA or Tower Hamlets Homes and who live in a relatively inefficient property with Energy Performance Certificate band C or below) to invite them to take part, with the hope of getting 1 in 3 to sign up.

Following the completion of recruitment of **energywise** participants and the installation of all equipment, an evaluation was undertaken of the recruitment and installation processes. This involved analysis of recruitment data, a non-participation survey, telephone interviews with a sample of participants, participant panels involving a sub-set of participants and a workshop with project partners, recruiters and installers. A repeat of this evaluation exercise was carried out following completion of recruitment of participants onto Trial 2 of the project, with a final workshop with project partners at the end of the project.

Key learning points from the evaluation of the **energywise** recruitment, installation and ongoing engagement approach are presented in this booklet, along with suggestions for how to replicate and improve upon this model.

Evaluation workshop



These are intended for:

- Those seeking to engage vulnerable or fuel poor customers during smart meter roll-out and energy efficiency campaigns – including policy makers, energy suppliers, DNOs and other organisations.
- Other DNOs and researchers developing or running trials with residential customers.

The energywise recruitment and installation approach

energywise is the first Low Carbon Network Fund project to test how a DNO, in collaboration with an energy supplier and trusted local intermediaries, can effectively engage with fuel poor customers on initiatives that can support them in the management of their energy use.

Adopting a best practice approach⁸

Research suggests that:

- Face to face communication and support is critical to recruiting and maintaining engagement of fuel poor trial participants;
- Contact should come from a trusted local organisation such as a housing provider or a well-respected local community organisation.

A team of dedicated, locally based, community-centred customer field officers was therefore recruited and trained up to lead on the recruitment and engagement of participants.

Introducing the energywise field officer team

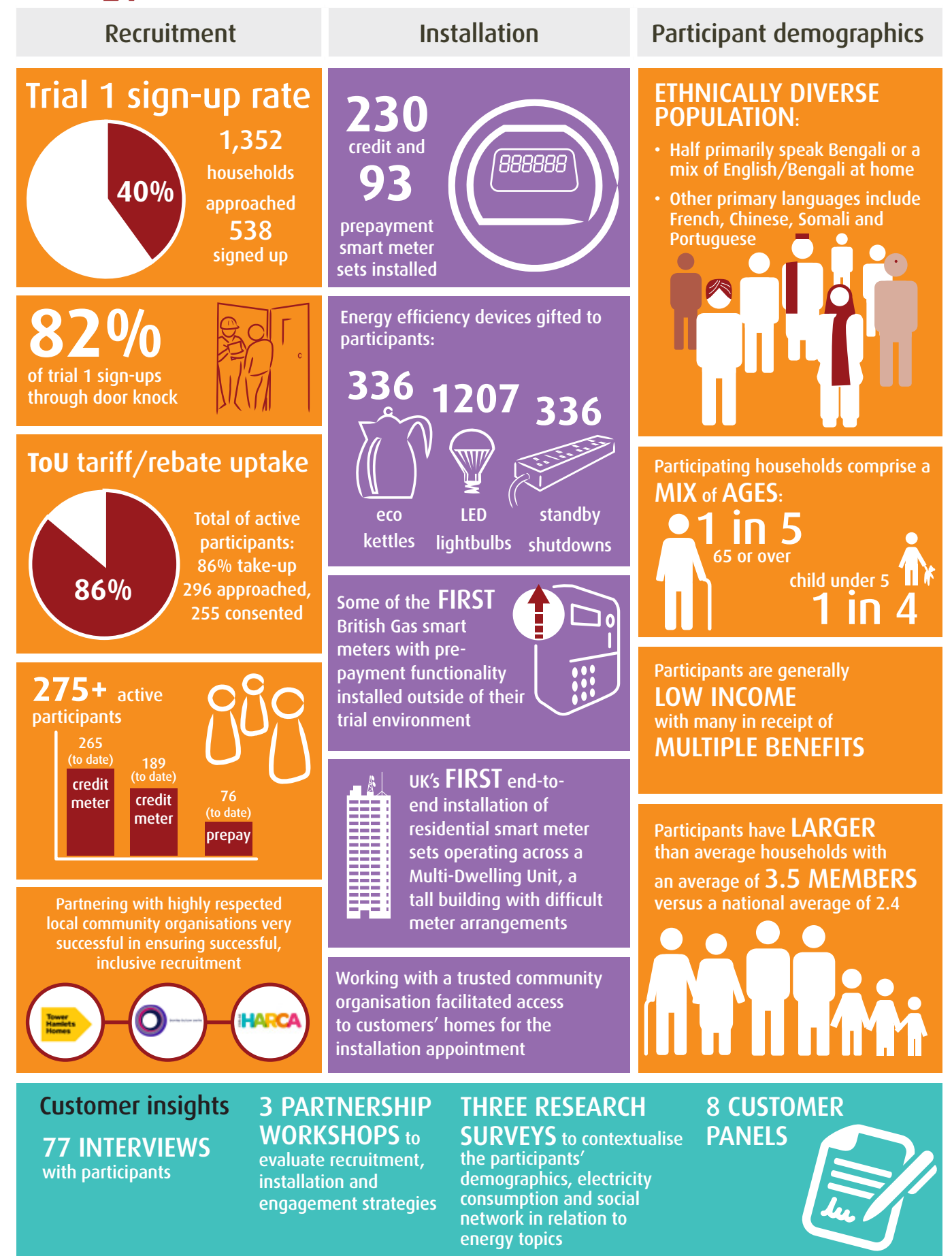
As well as leading on the recruitment of participants, the customer field officers also played a key role in the installation of equipment, working in partnership with British Gas to book installation appointments. They were also responsible for delivering the energy saving devices to participants and facilitating access to participants' properties when required.

- Employed by the project's recruitment partner, local community charity Bromley by Bow Centre.
- Most live in the local area and have good knowledge of local languages and cultures present within the borough of Tower Hamlets.
- Thorough training and induction programme delivered to ensure expert knowledge on the project as well as skills in identifying vulnerability, providing energy efficiency advice, engaging customers and in carrying out social research.



bromley by bow centre

energywise – what we have achieved

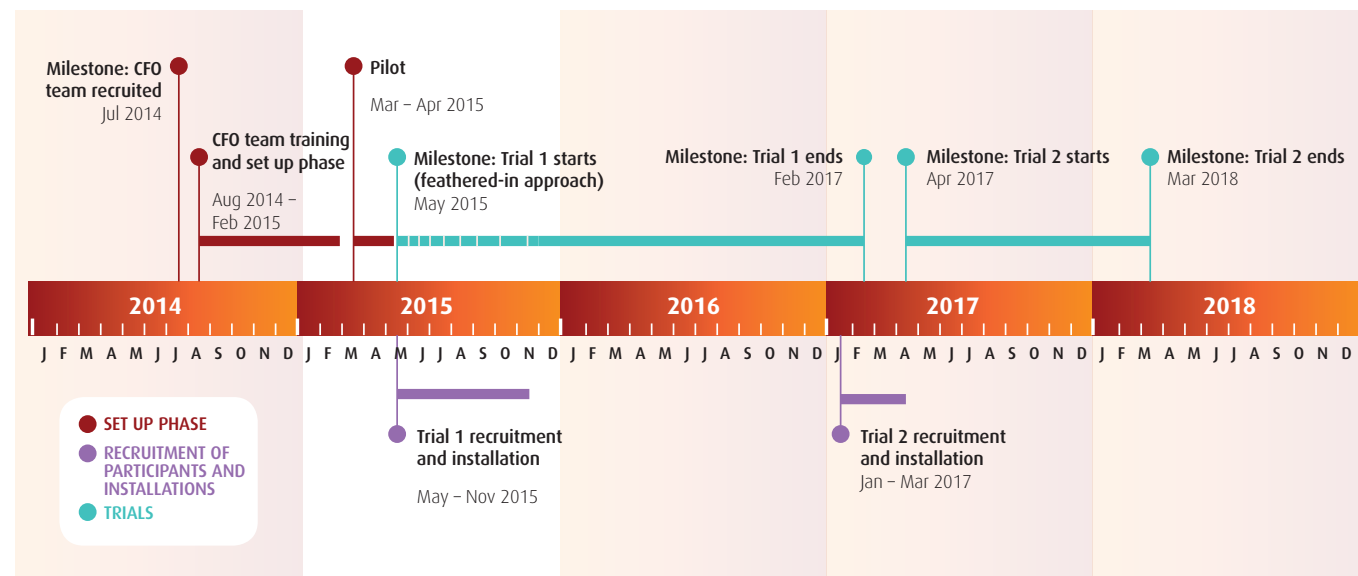


The energywise offer

Participants receive:



energywise overall project timeline

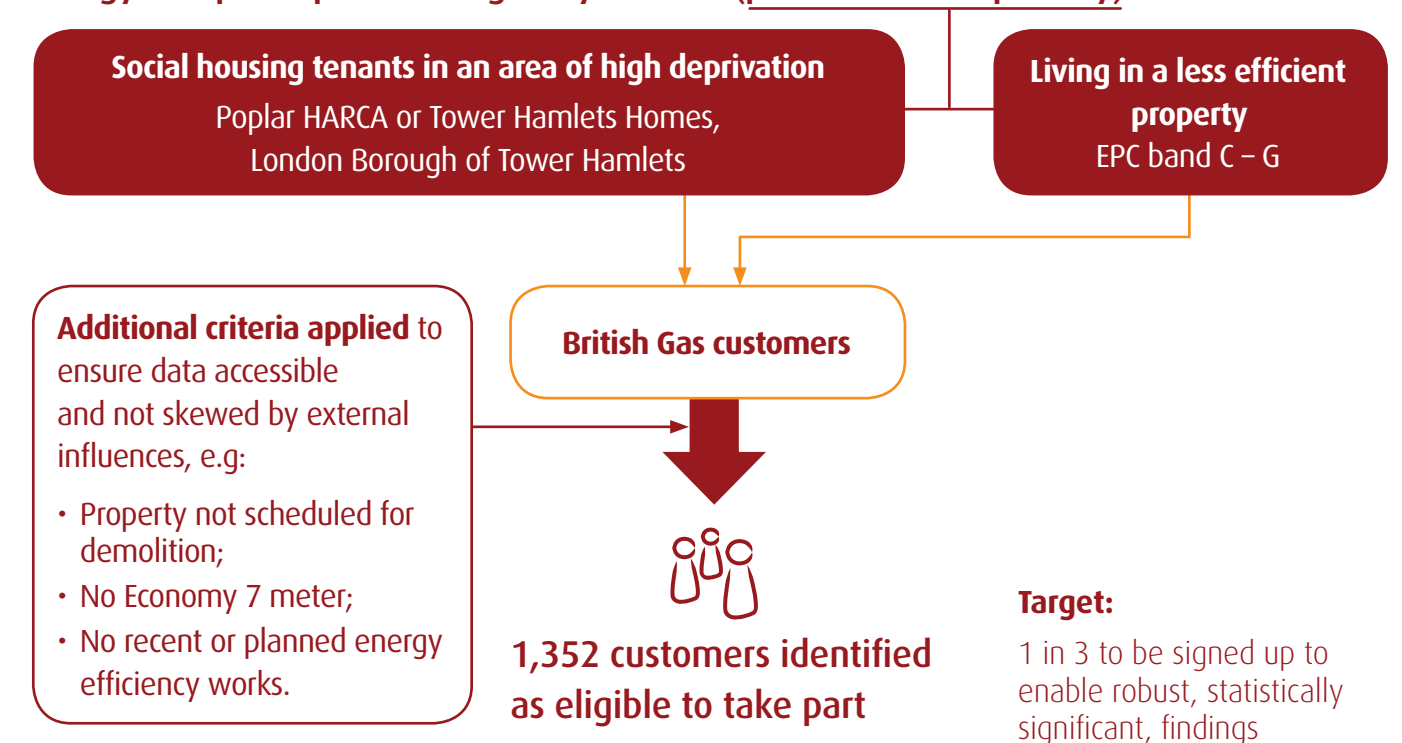


Identifying eligible participants

energywise is intended to engage fuel poor households. Fuel poverty is very difficult to measure accurately but is primarily a combination of low income and energy inefficient housing.

The process of pulling together the list of eligible participants involved multiple partners and multiple iterations in order to reach close to the target number potential participants. As a result, a maximum of 1,352 eligible participants were identified.

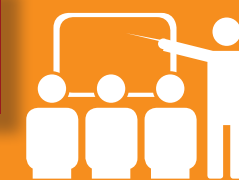
energywise participation – eligibility criteria³ (proxies for fuel poverty)



energywise learning points

Measures to help identify eligible participants

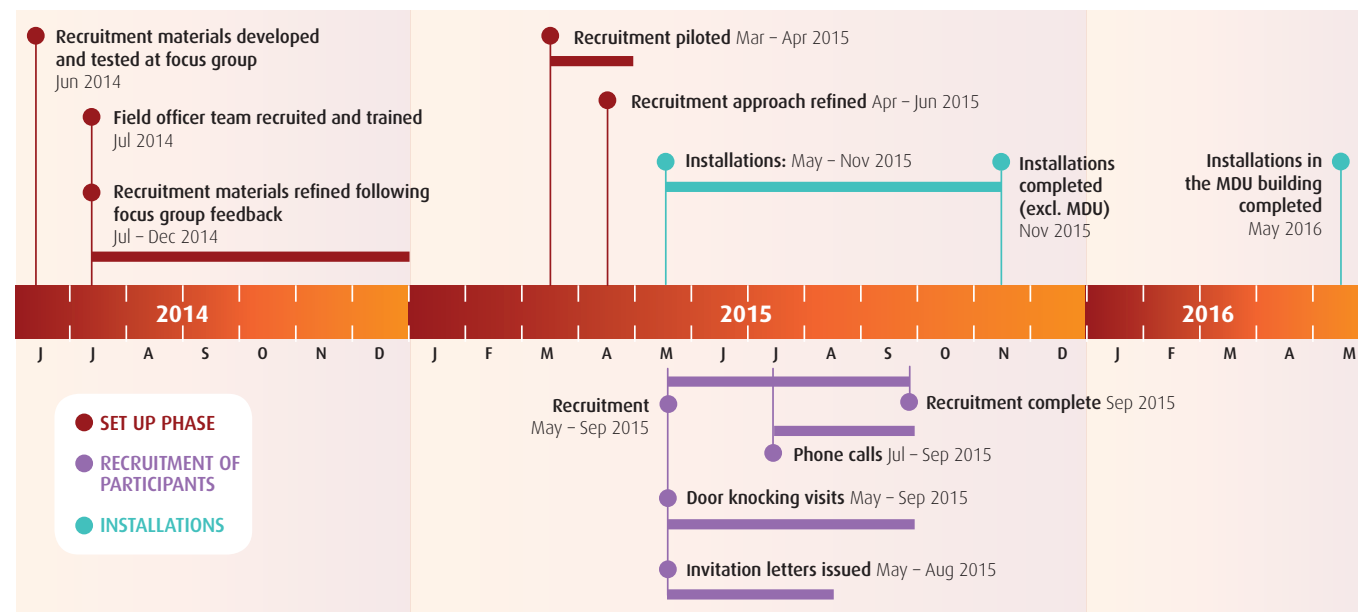
- Where public data on income and fuel bills is not available, proxies can be used to identify fuel poor customers such as social housing tenants living in lower efficiency homes in areas of high deprivation.
- Minimise exclusion criteria to maintain the biggest possible pool of potential participants. (Restricting participants to tenants of two social housing providers limited the number of households who could be approached.)



- Issue clear expectations to partners at the project outset about the data required and the format of this – reduce the number of iterations required.
- If using EPC data, consider purchasing this rather than requiring partners to supply it, as they may not have it in an easily accessible format.
- Allow for high numbers of drop-outs after sign-up. For long-duration projects take into account that people may change supplier or move house.

³ The full list of selection criteria is provided in the Successful Delivery Reward Criteria reports - SDRC 9.2 and 9.3.

energywise trial 1 recruitment & installation timeline



Recruiting participants

Preparing for recruitment

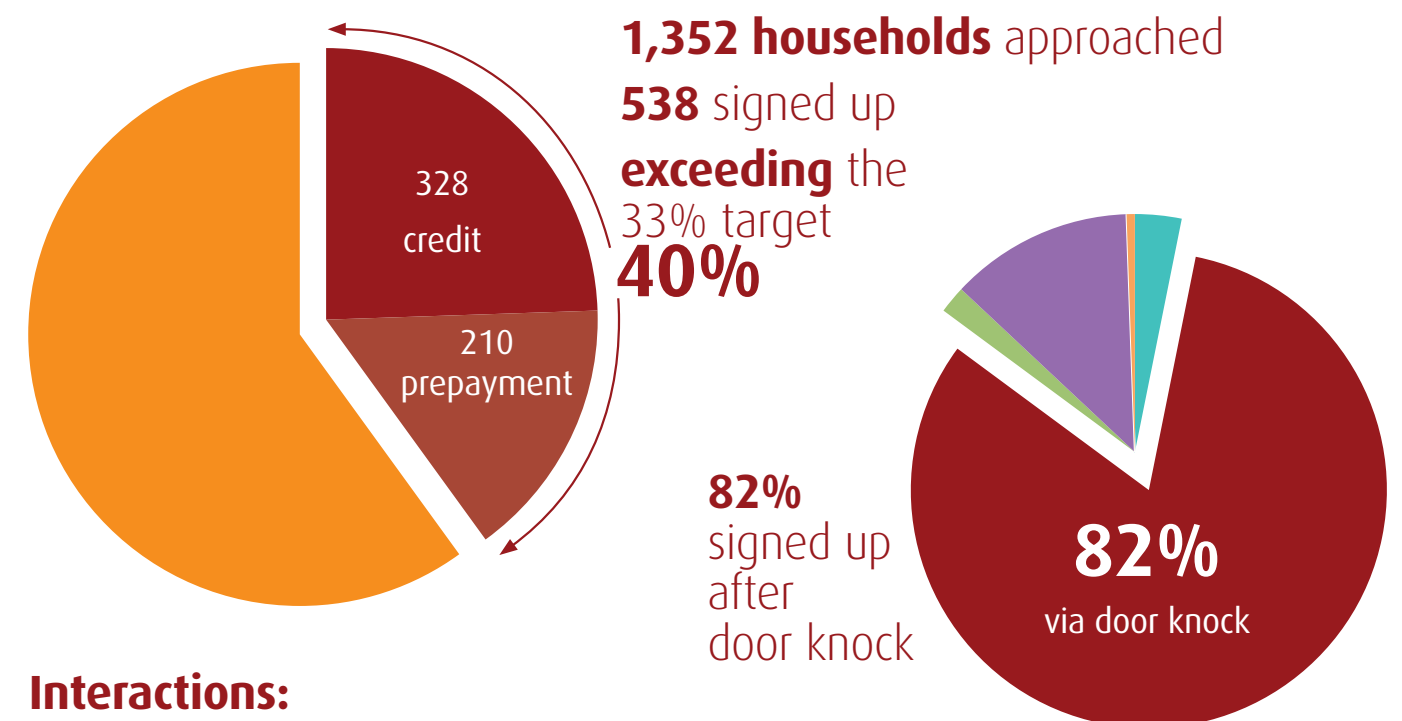
| FOCUS GROUP | PILOT | PILOT EVALUATION | KEY MESSAGES FINALISED |
|--|--|--|------------------------|
| June 2014 Draft recruitment materials and project branding tested via a focus group. Held at Bromley by Bow Centre; eight local participants. Feedback used to finalise the project's branding and key messages. | Spring 2015 Proposed recruitment approach and updated materials were piloted with 34 households. 15 signed up. Response rate of 42% (exceeding target of 33%). | Late spring 2015 Pilot approach evaluated. Findings included suggestion that households would only open a letter if it had their housing provider's logo on it. Recruitment approach refined in light of these findings. | May 2015 |

The recruitment approach

Best practice indicates that, for this target audience, face to face recruitment is the most effective. Therefore, once an invitation letter had been sent out (hand addressed, with a postage stamp rather than franking to encourage opening), the customer field officers went out to knock on the doors of invited householders, with a view to encouraging them to sign up to the project. In addition to the field officers, specialist recruiters were also brought in to help sign-up participants within the required timeframe.



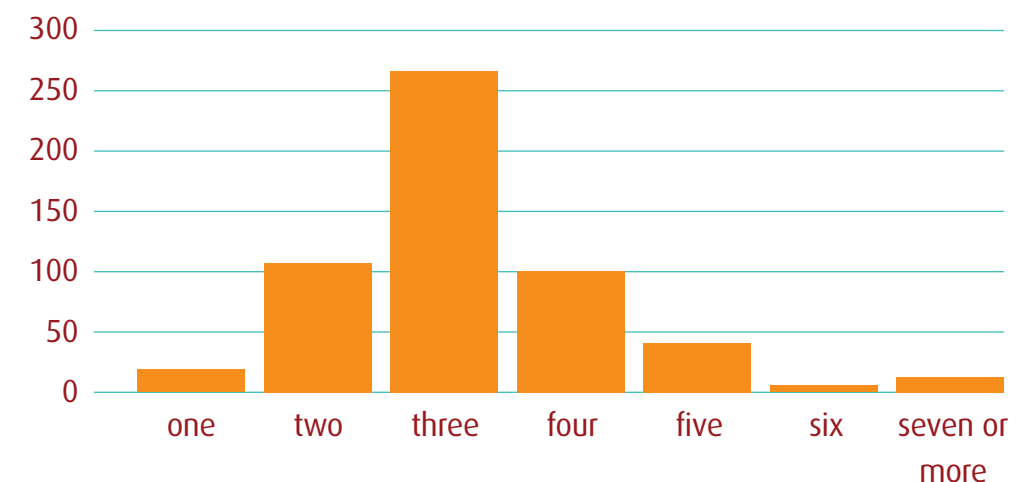
Trial 1 achievements



Interactions:

72% signed up within three
91% within four

Number of interactions before customer signed up



Diverse mix of participants – local field officer approach very successful in ensuring inclusive recruitment



Good feedback on recruitment materials (professional, well designed) and on the customer field officer team (friendly, professional and persuasive)

Recruitment onto the energywise project – key achievements

The energywise recruitment strategy was based on:

2 1 3

- Contact from a local trusted organisation with an excellent understanding of the local area and languages;
- An engagement strategy and materials tailored to the target population;
- Face-to-face communication and support.

This approach proved to be very successful in achieving the impressive 40% sign-up rate while ensuring inclusive recruitment. Around a third of participants are on prepay meters.

The vast majority of participants signed up when they received a door-knock from the customer field officers. Many participants said that the invitation letter was an important precursor to this, but not enough on its own to persuade them to sign up; only 17 signed up directly after receipt of the letter. Most participants said that it was talking to the customer field officers when they visited that persuaded them to take part.

Most felt the recruitment materials were well designed and easy to understand. However, some participants had initially assumed the letter was about switching energy provider and had discarded it; it was only when they received a door-knock from the customer field officers that they understood what the project was about.

Recruiters were instructed to clearly explain the difference between the intervention and control group and that participants would be randomly allocated to one group or the other. However, some participants in the control group felt that the distinction between the two groups could have been made even clearer at the point of recruitment.

Participants were very favourable in their comments about the customer field officers, with the team's friendly and professional approach praised. A high proportion of participants are Bangladeshi; many of this cohort appreciated being able to speak to the customer field officers in their main language (of Bengali), and others stated that they felt most comfortable when the door-knocking team included a woman.

The recruitment approach

Eligible households are identified by project partners

Invitation letter plus leaflet is sent to eligible households, inviting customers to sign up either on the project website or by calling the field officer team



Those not responding to the invitation letter receive a reminder letter a few days later



Those still not responding receive a door knock from a customer field officer



Those not responding after several door knocks are phoned by a field officer



Plus:

- At any stage during this process, customers could request a booked home visit from the field officers
- 80 selected customers (living within one mile of the venue) were invited to attend a drop-in event to hear more about the project and to have the opportunity to sign-up
- Customers signing up received a Welcome Pack with a £10 voucher, and the customer is randomly allocated to either the Control or Intervention group.



Why did customers choose to take part in energywise?

Top reasons for signing up

- 1 Opportunity to save money
- 2 Better visibility of energy bills
- 3 Offer of free devices
- 4 Easier top up for prepay customers
- 5 Taking part in an interesting project

Top reasons for not signing up

- 1 Not interested in the project; too much hassle or too busy
- 2 Ineligible; e.g. changing supplier or moving home
- 3 Sceptical of, or not interested in, potential benefits of smart meter

What did you think about the recruitment approach?

It (the invitation letter) was quite straightforward and easy to understand. The leaflet in particular – it was all very clear.

I wasn't sure of the offer when I read the letter, and had never heard of energywise, but an amazing lady came and explained in detail the process and that it would fit around my schedule.

I ignored the letter – I thought it was an ad for switching. I would have read it if it had been from British Gas.

I wouldn't have chosen to take part just from the letter; I needed to speak to someone too. The person I spoke to was polite and professional and persuaded me to take part.

They (the customer field officers) explained what the project was about clearly and in a professional manner.

energywise learning points

Ensuring effective recruitment



Staffing

- Locally based field officers with knowledge of local culture and languages can be very effective in recruiting hard to reach groups. Involving housing providers in engaging their tenants can also be effective.
- Having recruiters working in pairs, involving a diverse team, is effective. (Some customers are more comfortable talking to a woman.) Having a field officer working alongside a British Gas engineer worked well in terms of persuading people to sign up. Where possible, have pairs working together throughout the recruitment period in the same neighbourhood so they can develop a rapport with their targeted households.
- In addition to project badges, use of uniforms can increase recognition and trust.
- Bringing in specialist recruitment organisations can be effective in getting people to sign-up. However, the local team may have a deeper understanding of the community and may result in more effective long term customer engagement. Where specialist recruiters are employed, it is important to ensure coordination between the local customer field officers and the recruiters as well as consistency of key messages.

- Keep the team of recruiters small with regular refresher training, meetings to share learning and quality assurance of the door knocking.
- Staff should be well briefed on the project and trained in engagement techniques.
- Door-knocking is effective but time consuming, particularly when a project is not area-based. Evenings and weekends work particularly well.
- The recruitment partner should have excellent data management and analytical skills to enable high levels of data accuracy and the ability to amend the recruitment schedule as necessary based on the success of different approaches.
- An appropriately skilled field officer manager should be in post for the full duration of the recruitment and installation phases to ensure effective management of these critical phases, including efficient coordination between team members and consistency in the communication of key messages.



energywise learning points

Ensuring effective recruitment



Message and materials

- Low income customers are likely to be primarily motivated by the prospect of saving money on their bills. The offer of free energy saving devices and shopping vouchers can also encourage people to take part. In the case of smart meters, better visibility of energy costs and easier top up methods for prepay customers are the key features that make them attractive.

- Professional, well designed materials are essential. Customers in this group like highly visual materials with limited text.
- Clear indication about an energy supplier's involvement will limit any misconception that a project is about energy switching. The choice of an appropriate name for the project may also help.
- Test the messages and materials through focus group(s) before finalising.

Installing equipment

The installation approach

The customer field officer team was responsible for booking appointments and providing access and support to installers where required (e.g. translation skills to overcome language barriers).

Installation and delivery of the equipment was carried out by different organisations as per the table on p.14. The intention was to ensure a coordinated approach with all parties attending the customer property at the same time. However this was found to be difficult to implement from an operational point of view.

As a general rule, at least 48 hours' notice should be provided to caretakers of when meter access will be needed. British Gas found that the customer field officers were helpful in aiding access to properties for the temperature monitoring installations (which were carried out by British Gas' subcontractors, PassivSystems).

Furthermore, they found there was a slight increase in the appointment booking success rate as a result of the customer field officers having previously engaged with householders. Based on the **energywise** experience, it is recommended that the installation process is best managed by energy

suppliers; for harder to reach customers, third parties can play a useful role in terms of initial recruitment and engagement and any necessary additional support.



energywise trial 1 equipment installation



Electricity and gas smart meters



Intervention group plus control
group credit customers

Only smart meters (without a smart energy monitor) were installed for the control group to capture consumption data.



Navetas loop electric monitor
(to provide consumption data)



Control group prepaid customers



Temperature monitoring
equipment



All participants

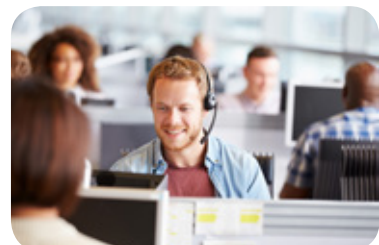


Delivery of energy efficiency
devices



Customer
field officer team

Intervention group



Follow up call to check
satisfaction with installation



Those who had a British Gas
installation

energywise learning points

Ensuring effective installation



- Where installations need to be completed within a short timeframe, this can be facilitated by ensuring that plenty of weekend appointments are available.
- Streamlining the customer journey should increase installation success rates. For example, enabling the Customer Field Officer team to directly book in appointments (by ensuring they are provided with potential appointment slots) means less hassle for customers who should then be more likely to make and keep an install appointment.
- Where smart meters are being installed in social housing, the installation process can be facilitated by:
 - energy suppliers requesting a list of addresses from the housing provider for which a staff member (e.g. caretaker) will need to enable access;
 - the energy supplier then contacting the caretaker in advance to request they are present to enable this access at the appointed time.
- Involving a community partner can increase appointment booking success rate.
- Pilot the installation phase before rollout.
- Having the energy supplier manage the installation process will ensure that customers have a single point of contact.
- Minimise customer disruption by liaising with third parties to ensure meter access (where necessary) and coordinating installation and equipment delivery into one appointment if possible. (The latter was challenging for energywise as a different organisation was responsible for installing the temperature monitoring equipment.)
- Urge households present at the point of install to brief others living in the household about the smart meter and smart energy monitor, otherwise the benefits from the smart meter technology will be limited.
- For complex projects involving different installation partners, provide clear information to participants about what will be installed, by whom and how long it will take.
- Train up the customer field officer team to install and demonstrate equipment where possible (e.g. the kettle and the standby shutdown).
- Planning should take into consideration any locally relevant festivals or traditions, such as Ramadan.
- Customer field officers can aid access to properties and can provide translation where necessary.



Recruitment onto Trial 2

Time of Use tariff

Trial 2 focused on encouraging customers to shift their electricity use at certain times through Time of Use tariffs/rebates. A different ToU tariff was offered to participants who pay for their electricity through a credit meter and those who have a prepayment meter. Trial 2 participants were recruited from existing energywise participants.

Prepayment customers – Bonus Time

Prepayment customers were offered Bonus Time, a dynamic non-punitive Critical Peak Rebate scheme in which customers who reduce/shift their electricity demand during pre-notified time periods (DSR events) were rewarded with additional credit on their meters. The price for electricity during these periods remained the same but each



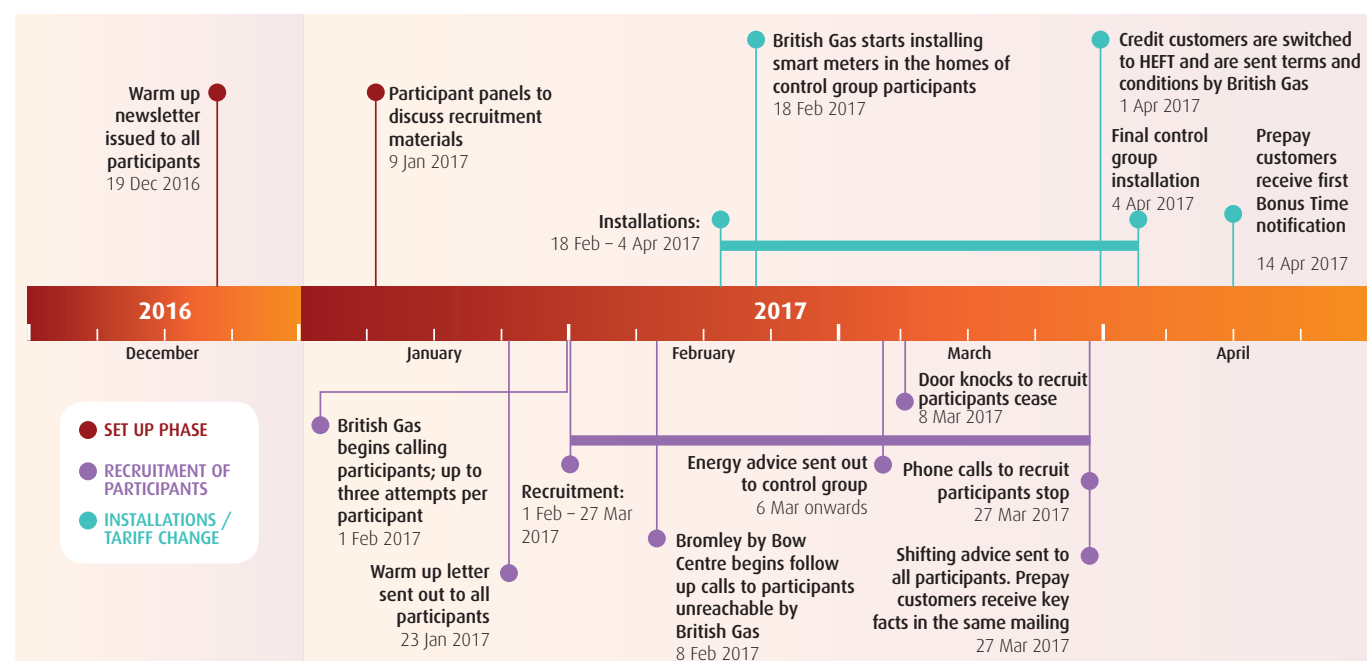
customer was credited 10 units back for every unit of energy they saved within the Bonus Time period. Notifications were provided via SMS (plus email where desired).

Credit customers – Home Energy Free Time

Credit customers were offered a static free time ToU non-punitive tariff. Customers could choose to receive free electricity on either Saturdays or Sundays between 09:00-17:00.

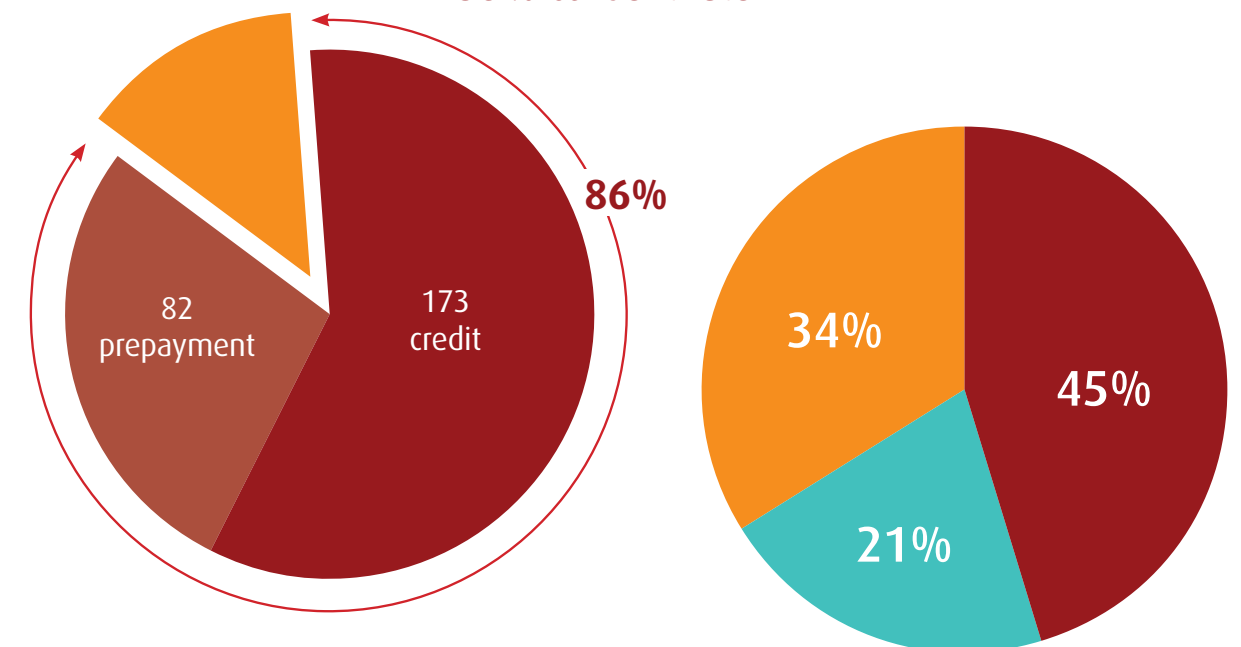


Trial 2 timeline



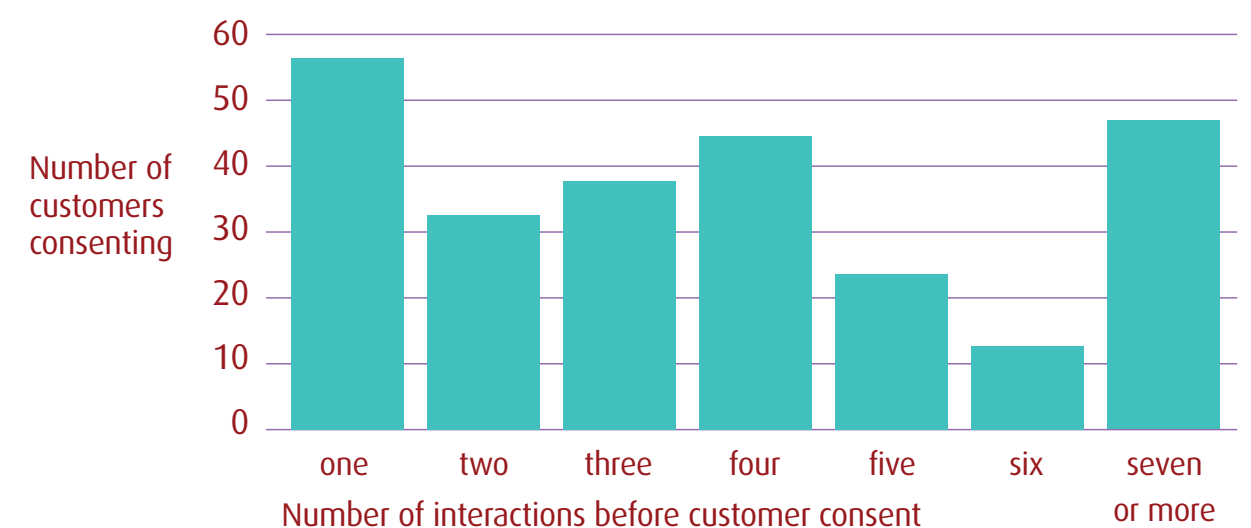
Trial 2 recruitment achievements

296 households approached
255 consented resulting in
86% consent rate



Interactions:

67% consented within three
77% within four



Because credit customers had to provide consent to British Gas (as they required a tariff change), but were in some cases more likely to accept a call from the CFO team, many interactions were required for a handful of participants before consent was granted and an installation appointment booked.

Trial 2 recruitment & engagement

Key achievements

2 1 3

- A high proportion of participants – 86% – signed up to take part in trial 2 (with similar levels for the two different offers), showing that the two propositions were well received.
- The recruitment approach built on learnings from the trial 1 recruitment process for example in terms of coordination of activities (with a daily call between key partners) and in terms of the best time of day to call (after 10am and avoiding the afternoon school run). This resulted in a smoother recruitment process.
- Because of the Customer Field Officers' excellent knowledge of the project's participants, the recruitment approach could be tailored to the participant (for example phoning or door knocking at times of day the participant was most likely to be in).
- Participants were very positive about the materials, finding them to be accessible and fit for purpose.
- The shifting advice was well received with feedback that this is useful in helping participants to respond to the ToU tariffs.

Learning points

- Communicating Critical Peak Rebates to customers can be challenging particularly in the case of vulnerable participants and/or those with limited English. Some participants really benefit from face to face communication. A video explaining the process would be beneficial.
- Call scripts should be kept as short as possible.
- Customers are more likely to respond to a mobile number that appears on their screen than to an 0800 number.
- Minimise interactions with customers by limiting the need for them to speak to more than one person as part of the signup process.
- Where different organisations are involved in the process, instituting daily calls helps ensure everyone is up to date in terms of the status of individual participants.

"I do most of my laundry in the free time. And try to do the ironing too."

"Normally you do all your chores on a Saturday so it works really well."

"I love Bonus Time. It's like a holiday. I refuse to go into the kitchen."

"My son loves to keep the display in the green."

Credit customers told us:

"I've changed my weekend routine to cook a roast in my electric oven on a Saturday afternoon."

"I like seeing the unit price stay at £0 during my free hours on my smart energy display."

Pre-payment customers told us:

"I can pre-cook sometimes. And I will not do my washing I'll do it the next day."

"I wish it (Bonus Time) could go on forever!"

Ongoing engagement of participants

Retention of trial participants is key to the robustness of the project findings. There is an ongoing programme of participant communication designed to keep participants engaged in the project and to minimise dropout rates.

In addition to communication about particular aspects of the project (e.g. information on Trial 2, information about the end of project procedures), ongoing engagement consisted of six key activities as illustrated below.



Participant panels; meeting quarterly; £30 vouchers as a thank you for those attending; membership open to all

participants. Aim: to act as a sounding board for participant views, with feedback used to refine communication and approach. Different panels for Control and Intervention groups (Trial 1) and for credit/prepay customers (Trial 2). Panel meetings generated valuable feedback on the project and provided an opportunity to test any planned communication or surveys, thus allowing processes to be continually improved to ensure participants' experiences on the project were optimised.



Regular newsletters were sent to all participants throughout the project; different version for different groups. Aim: to keep participants informed

about project progress and to provide additional information identified by the participant panels as being beneficial to participant.



Action to mitigate identified risks

e.g. delays in Trial 2 starting (resulting in control group participants having to wait longer than anticipated for their energy efficiency devices) and disruption experienced by some participants as a result of the temperature monitoring equipment. This involved sending a thank you letter and £10 voucher for staying in the project; plus offering participants the option to opt-out of the temperature monitoring equipment.



Vouchers

Thank you vouchers were provided to participants in recognition of their ongoing participation. As well

as receiving a £10 voucher with their welcome pack, all participants also received a £10 voucher for their ongoing participation towards the end of Trial 1 and a further £30 of vouchers at the end of the project. Participants taking part in the panel meetings and the customer interviews were provided with additional vouchers, as were those who kept their appointment to have their equipment decommissioned at the end of the project.



Shifting Advice

Just before the start of trial 2, participants received a document with advice about how they could shift their electricity use to make

the most of the trial. Different versions were produced for HomeEnergy FreeTime and Bonus Time participants. This was well received with feedback that it was useful in helping participant to respond to the tariffs.



Text messages

Prepay customers were informed of Bonus Time events via SMS (plus email upon request).

One message was sent the morning before the Bonus Time period with a reminder shortly before the period started. Participants said they were happy with the format and timing of these notifications.

What do you think about the participant panels and the project newsletter?

"The project is absolutely great; the people are very good, there's nothing I'd want to change. The best thing about it is the panel; I really like going to that."

"I was nervous about coming to the panel, as I'm not someone who likes speaking out, but I enjoyed the process and am more confident about it now."

"The newsletter was good in the sense you could see what was going on in a nutshell."

"The newsletter is better now. (Following feedback from panel members.) There are more images. It's easier to understand."

Customer engagement through the project closedown

Project closedown and decommissioning communication

Participants were sent clear communication about the process for end of the project with a timeline provided as part of the end of project newsletter. This helped to ensure that participants knew what to expect. All information sent out was tested with participants at the final participant panel meeting, and refined based on their suggestions.

Participants were contacted to arrange collection of their temperature monitoring equipment, with a £10 voucher offered as a thank you. Equipment was only collected from around half of participants; others no longer had the equipment or failed to respond to calls to schedule appointments.

End of project party

An end of project party was held for participants and their guests, with games, prizes and information on the project outcomes. Representatives from a range of project partners attended. Participant feedback was very positive and it was felt that the party offered a valuable way of closing the customer journey and of engaging with a wider cohort of participants than those who typically attended the participant panel meetings.



Participant drop-outs and ongoing engagement

The project has experienced a higher number of participants dropping out than was envisaged; it is important to understand the reasons for this in order to inform future projects and options for improving the project's engagement strategy. 273 participants who originally signed up to the project chose to leave before the end of the project. This can be split into those opting to leave (128) (e.g. because they changed their mind about wanting to be in the project) and those who were disengaged by the project (145) (e.g. because they moved house).

The ongoing programme of engagement, as described on the previous page, was designed to minimise the numbers of participants opting to leave the project before its completion.

Participant drop-outs

Top reasons for participants leaving the project

- 1 Changed their mind about wanting to be in the project or wanting a smart meter
- 2 Perceived hassle of installation process

Top reasons for disengagement by project

- 1 Changed supplier or moved house, becoming ineligible
- 2 Technical problems with install, e.g. meter was inaccessible or a signal could not be established
- 3 Customer failed to respond to requests for install appointment or did not provide access at time of appointment

energywise learning points

Minimising dropouts and ensuring effective ongoing engagement

- Provide very clear messages about what is involved in the project, possibly including a video, and ensure consistency of messages across different recruiters to effectively manage participants' expectations.
- Avoid equipment that is outside the scope of the project, which may cause further disruption to the participants. In the case of energywise, issues with the temperature monitoring equipment caused unwelcome disruption for some participants.
- Streamline the installation process to reduce the number of interactions with customers.
- Minimise the number of unexpected interactions with customers in general.
- Keep participants as a whole informed of what is happening in the project.
- Provide participants with an opportunity to get together to share their experiences and learn from each other. Listen to participants about their experiences and take action based on their feedback.
- Keep in regular communication with participants to remind them of how useful their involvement is and to thank them for their time – with vouchers where appropriate (e.g. where customers have faced disruption).



Further information

For further information on the energywise project:

- Web: <http://innovation.ukpowernetworks.co.uk/innovation/en/Projects/tier-2-projects/Energywise/>
- Email: innovation@ukpowernetworks.co.uk

The following reports may also be of interest:

- energywise communications plan
- SDRC 9.4 customer engagement
- energywise; engaging vulnerable customers in the smart meter rollout

Information on the energy savings and energy shifting achieved through the project can be found in:

- SDRC 9.5 energy saving



Campaigning for Warm Homes