



**CENTRE FOR
SUSTAINABLE
ENERGY**

Helping Households to Act on Energy Advice

Final Report

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1 Project details

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2 Partner details

- Centre for Sustainable Energy (lead partner)
- Local authorities
 - Bristol City Council – Dave Cowley, HECA Officer
 - Mendip District Council – Anne Tope, Energy Efficiency Officer
- Eaga Partnership Ltd – Carl Herring and Sam Robinson, Network Liason Officers

3 Executive summary

Helping Households to Act on Energy Advice aimed to reduce carbon emissions from vulnerable households (defined as being those over 60 and/or in receipt of income-related benefits) living in privately-owned or rented accommodation. Those targeted were households in Bristol (an urban area) and Mendip (a rural area) that had already received a Home Energy Check (HEC) for their home from the Bristol & Somerset Energy Efficiency Advice Centre (EEAC) and were identified as potentially benefiting from loft and/or cavity wall insulation. Where possible, households were contacted by phone and encouraged to apply for the most appropriate grant or discount scheme.

They were also provided with any other energy-saving advice requested. Where this was not possible, households were contacted in writing and asked to complete a simple form if they required referral to a grant scheme. Wherever possible, a direct referral was made to the most appropriate scheme for the householder, to ensure that that application process was as simple as possible.

In total, 2,823 households were contacted, 67 were referred for loft and/or cavity wall insulation and it is estimated that the carbon saved as a result of measures installed from these referrals will be 363.12 tonnes over the lifetime of the measures. The actual carbon saved as a result of the project is likely to be higher as this figure does not take into account any measures installed as a result of providing advice on schemes rather than a direct referral, or carbon saved as a result of behavioural changes. Looking at those that had completed their HEC prior to 31st March 2004, 0.9% of Bristol households and 5.1% of Mendip households were referred for a grant. In Mendip, the referral rate of 5.1% is higher than the 5% rate taken to be 'good' as a market research standard. Thus in Mendip, following up a HEC report with further contact can be considered to be a worthwhile activity and to have a positive effect on the number of householders referred for grant schemes. In Bristol the referral rate of 0.9% is much lower than in Mendip and for no clear reason. Despite the rate being lower than that considered as 'good', the method will continue to be used in Bristol as in total 31 households were referred for a grant. Of these, most had completed their HEC after 31st March 2003 but there is no evidence to suggest that given further time they would have followed the recommendations given in their HEC report.

The study also looked at whether the effectiveness of a HEC report followed by further contact by the EEAC differed between an urban area and a rural area, and also whether follow-up contact by phone was more effective than follow-up contact in writing. No statistically valid difference was found between any of these variables. However, the number of households in Mendip that had had loft and/or cavity wall insulation installed following the receipt of their HEC report was found to be significantly higher than in Bristol. There is no clear reason why this is, but factors could include the launch and marketing of the Somerset Warm & Well scheme from October 2003 onwards and the relatively elderly population in Mendip that has more time to follow up the recommendations of the HEC report and for whom a warm home is more important due to their age.

The cost of making a referral to both the Somerset Warm & Well scheme and the Warm Front scheme is estimated to be £23 when the follow-up contact is made in writing and £150 when the follow-up contact is made by phone. As there is no significant difference between the effectiveness of contacting households in writing compared to contacting them by phone, this suggests that it is much more cost effective to follow up households in writing rather than by phone.

4 Description of the feasibility study

a) Scope of the study

Helping Households to Act on Energy Advice targeted the most vulnerable households (defined as being those over 60 and/or in receipt of income-related benefits) living in privately-owned or rented accommodation. Those targeted were households that had previously completed a Home Energy Check (HEC) and been identified as potentially benefiting from loft and/or cavity wall insulation. The overarching aim of the study was to help them improve the energy efficiency of their home and to access the grants and discounts available to help them do so.

b) Background

The Bristol & Somerset Energy Efficiency Advice Centre (EEAC) is one of a national network of 52 advice centres funded by the Energy Saving Trust (EST). The network was set up to provide free and impartial advice to householders on energy efficiency and the grants and discounts available to them. This advice is given over the phone, face to face and also in writing. The vast majority of households contacted by the network complete a HEC and receive a free report for their home outlining the most suitable measures for their property. The bulk of these HECs are sent to households via mass mailings and so in many cases the report is the only contact that they have with the EEAC unless they contact the EEAC themselves, something which only approximately 2% of households in the Bristol & Somerset area choose to do. From this we can conclude that either the householders are mostly happy with their report or, as Boardman and Darby (2000)¹ suggests, the reports are not read and/or not understood. The report may particularly prejudice fuel poor households who may have limited literacy and numeracy skills and may not read printed advice; yet this may be the very same people that are most in need of energy efficiency advice and grants. Thus this project aimed to target the most vulnerable households that had already received a report to ensure that as many as possible were able to access the energy advice and grant/discount schemes most suitable to them.

Also, while many EEAC territories cover either a predominantly rural or predominantly urban area, the Bristol & Somerset EEAC covers a very large rural area (Somerset) and also a large city (Bristol). Thus we were particularly interested in whether the existing method of providing advice via a HEC report is equally effective in an urban area compared to a rural area and whether willingness to apply for a grant differed between the two areas.

¹Boardman B. & Darby S. (2000) *Effective Advice: Energy Efficiency and the Disadvantaged*. Oxford Environmental Change Institute.

c) Purpose of study

The main purpose of the study was to increase the uptake of energy efficiency grants and discounts by the most vulnerable homeowners and private tenants (defined as being those over 60 and/or in receipt of benefits), thus resulting in increased carbon savings. As well as providing advice and information on grants and discounts, the project also aimed to further increase carbon saving by advising on behavioural changes and other measures where appropriate.

The secondary aim of the project was to ascertain whether there was a significant difference between grant uptake in a rural area compared to an urban area, both prior to the follow-up advice provided as part of this study and after. The study also aimed to quantify the cost of making referrals using the method of follow-up advice, both by phone and in writing. This cost could then be used to assess the cost effectiveness of the follow-up method, compared to other methods used by grant schemes to increase uptake.

d) Aims & objectives for the lead organisation and any partners (as distinct from the overall aims and objectives of the study, if appropriate)

None of the partners had any aims or objectives that were distinct from the overall aims and objectives of the study.

e) Role of partners in the feasibility study

The Centre for Sustainable Energy was the project manager and matched funding for the project was provided by the three other partners, Bristol City Council, Mendip District Council and Eaga Partnership. All three partners were involved in project meetings and

will aid in the dissemination of this report. Mendip District Council originally agreed to provide assistance with the delivery of home visits in the Mendip area but, as explained on page 6, home visits were found to be unnecessary to deliver the project.

f) Programme of work/methodology

• Identification of householders

Households in the Bristol and Mendip local authority areas that had completed a HEC between 1st April 2002 and 21st April 2004 were identified using the national DAX database used by the EEAC network. From this data, households that met the following criteria were selected:

- occupied by the owner or private tenant
- resident over 60 and/or in receipt on benefits
- little, none or an unknown amount of loft and/or cavity wall insulation
- non-data protected

Selected households were sorted by local authority into the following categories

- phone number given
- no phone number given
 - 60 or over and not on benefits
 - 60 or over and on benefits
 - under 60 and on benefits

• Contact of householders

The main aim of contacting the householders was to encourage them to apply for a grant or discount for loft and/or cavity wall insulation. Householders in Bristol were encouraged to apply to the Warm Front grant scheme – a national scheme funded by DEFRA that targets those on benefits that are also 60 or over or have a child under 16 or have a disability. Warm Front can provide a full grant for cavity wall and loft insulation and in certain cases, heating improvements. Householders in Mendip were encouraged to apply to the Somerset Warm & Well scheme which incorporates Warm Front but is also funded by the local authorities in Somerset and a major fuel supplier. The key difference between the two schemes is that the Somerset Warm & Well scheme can also provide a full grant for loft and/or cavity wall insulation to anyone in receipt of benefits, anyone on a low income with savings of less than £16,000 and anyone aged 70 or over, regardless of their income or benefit status. Both schemes are aimed at homeowners and private tenants, thus the decision not to contact tenants of social housing as part of this project.

All those for whom a telephone number was not available (1743 in Bristol and 632 in Mendip) were sent a standard letter explaining that they were being re-contacted by the EEAC to ascertain whether they required any further advice/referral to a grant scheme. This letter was accompanied by basic grant information and a simple form to complete if they required a direct referral to the most appropriate scheme (where a direct referral was possible). All letters also included the freephone advice line number for those that would rather call us directly. Where possible, those that responded were referred directly to the most appropriate grant scheme. Others were either sent the most appropriate information or called to discuss their situation where it was unclear from the form how we could help them. Those spoken to were also referred to a grant scheme/sent further information where appropriate.

All householders with a telephone number were contacted in the first instance by phone. Those that we were unable to speak to directly were sent written information as detailed above. Those that were reached by phone were asked standard questions covering whether they had carried out any energy efficiency measures since receiving their report, whether they had accessed grants or discounts to help them do so or if they would like us to help them do so. For householders in Mendip

we were able to offer to refer them directly to the Somerset Warm & Well scheme and to arrange for a no-obligation survey of their property. For Bristol households, we were able to refer those eligible directly to the Warm Front scheme if they so wished, but to all others we were only able to send them further information on the various schemes as no other referral mechanisms are available. As well as advice and information on grants and discounts, householders were also asked if they required information on any other aspect of energy efficiency. All those contacted by phone were sent follow-up supporting information, if appropriate.

Where it was felt that a householder would especially benefit from a home visit, either because they needed help completing the application form or found it difficult to understand advice given over the phone, e.g. the use of heating controls, advisers were able to offer a home visit. However, none of the householders actually spoken to as part of the project either requested a home visit or appeared to particularly need one and thus none were undertaken as part of this project.

- **Tracking responses and referrals**

All responses and referrals (verbal and written) were logged on a database. Referrals made to both the Somerset Warm & Well scheme and the Warm Front grant were monitored using the referral systems in place.

Prior to this project the EEAC did not have a suitable method of tracking the outcomes of referrals made to the Warm Front scheme. Thus, for this project it was decided to pilot the Eaga Miller online referrals system. The Miller system allows the referrer to make referrals online and to track their progress. However, shortly after being trained by Eaga on the use of this system, another option for making referrals was suggested. The EEAC was given the opportunity to send all Warm Front referrals to a named surveyor on a weekly basis. Once surveys were completed, the surveyor would then send information on their outcome back to the EEAC. As well as providing outcomes of the survey, this system also had the advantage of the EEAC knowing who to contact within Eaga (the surveyor) if there were any problems with arranging a survey. The surveyor was also willing for his phone number to be provided to households should they have the need to rearrange a survey or wanted to query when they could expect to receive a survey. This negated any reason for either the EEAC or the householder to call the national Eaga call centre, something that can be both very time-consuming and frustrating. Thus we decided not to use the Miller referral system but to send our referrals on a weekly basis to the named surveyor. On the weekly referrals sheet, those referrals being made as a result of this project were indicated to allow future tracking of their outcomes. So far we have found this referral method highly satisfactory and will continue to use it in the EEAC and for other related projects.

For the Somerset Warm & Well scheme, detailed tracking systems were already in place and so these were used to follow the measures installed as a result of this project.

Unfortunately, for both households in Bristol and Mendip, it is not possible for us to track the outcome from all those for whom we were only able to provide information on schemes and other advice, rather than a direct referral. The results section below focuses on the direct referrals made to the Somerset Warm & Well and Warm Front grant scheme and their outcomes, and not on any other advice and information provided.

g) Results

At the time of this project the grant schemes available to householders in Bristol were

very different to those available in Mendip. The main difference being that householders in Mendip aged 70 or over could receive a full grant for loft and/or cavity wall insulation regardless of income or benefit status, while those in Bristol are required to be on benefits before they can receive a full grant. Thus, only referrals made as a result of contacting those believed to be on benefits have been used for the purpose of comparing the results.

Also, for the purposes of comparing results between the two areas, this report looks only at referrals made for loft insulation, cavity wall insulation, draughtproofing, compact fluorescent light bulbs (CFLs) and hot water tank jackets. It does not take into account any heating system improvements/installations made as part of the project. This is because the Warm Front criteria that must be met in order to receive heating system improvements are very complex and it is not possible to assess whether households meet the criteria through the use of a simple form, or even after a detailed phone conversation in some cases. Also, although those referred to Somerset Warm & Well that are also eligible for Warm Front may receive heating improvements, they are not recorded by the Warm & Well tracking system. Thus it would be incredibly difficult to compare the results of heating system improvements installed as a result of referrals made to the two different grant schemes.

Analysis of results

The chi-square test of independence was used to assess whether there was any significant difference in both the response rate and referral rate between householders in an urban area (Bristol) and households in a rural area (Mendip). The test was conducted both for households contacted in writing and for households contacted by phone. The same test was also used to assess whether there was a statistical difference between effectiveness of contacting households by phone compared to in writing, in the two different areas. Finally, the same test was used to assess whether there was a statistically valid difference between the numbers that had had insulation measures installed prior to being contacted as part of this study in the two different areas. A summary of the results is provided below, with more the detailed findings following it.

Summary of results analysis

The only statistically significant conclusion that can be drawn from the statistical analysis of the data is that householders in Mendip are more likely than householders in Bristol to have loft and/or cavity wall insulation installed following the receipt of a HEC report.

There is no statistically valid difference between the referral rate and response rate in a **rural** area compared to an **urban** area, regardless of whether the householder is contacted by phone or in writing, and whether the householder has a resident over 60 or not.

In Bristol, 0.9% of those that had completed a HEC prior to 31st March 2003 were referred for a Warm Front grant. In Mendip, 5.1% of those that had completed a HEC prior to 31st March 2003 were referred for a Somerset Warm & Well grant. This is above the 5% response rate taken to be a 'good' rate as a market research standard.

Details of results analysis

Where householders in receipt of benefits and with a resident **under 60** were contacted **by letter**, no significant difference in both the response rate and the referral rate was found between households in a rural area and households in an urban area.

Where households in receipt of benefits and with a resident **over 60** were contacted **by letter**, no significant difference in both the response rate and the referral rate was found between households in a rural area and households in an urban area.

Where households in receipt of benefits and with a resident **under 60** were contacted **by phone** insufficient data was available to conduct a valid test to assess whether there was a statistically valid difference between the referral rate for households in a rural area compared to households in an urban area.

Where households in receipt of benefits and with a resident **over 60** were contacted **by phone**, no significant difference in the referral rate was found between households in a rural area and households in an urban area.

Where households in receipt of benefits and with a resident **under 60** were contacted **by phone** the data was not sufficient to conduct a valid test to assess whether there was a statistically valid difference between the number of households that had already installed measures in a rural area compared to an urban area.

Where households in receipt of benefits with a resident **over 60** were contacted **by phone**, the difference between the number of households that had already installed insulation measures was found to be significantly higher in the rural area compared to the urban area, at the 99.95% level of probability. Unfortunately, many of those contacted could not remember who had installed the insulation measures and whether it had been done under a grant or discount scheme. Thus it is not possible to accurately assess how many of those had accessed the grants or discounts that they may have been entitled to.

For householders in both Bristol and Mendip the data was insufficient to conduct a valid test to assess whether there was a significant difference between referrals rates resulting from written follow up compared to verbal follow up. This is true both for households on benefits with a resident over 60 and for households with a resident under 60. Combining the results from Mendip and Bristol provided enough data to conduct a valid test, but no statistically valid difference was found between the effectiveness of the two methods in generating referrals.

Information and application forms for other grant schemes were also sent out during this study where appropriate. Unfortunately, it is not possible to assess the effectiveness of the information provided or the results achieved as part of this study. The same is true for any other advice provided on energy saving, such as advice on behavioural changes.

To assess whether follow-up advice to a householder that has received a HEC is more effective than a HEC alone in generating referrals to grant schemes, all those that had completed a HEC prior to 31st March 2003 were considered. The reason for excluding all those that completed a HEC from April 2003 onwards is that a typical householder will require time to review the report and follow up its recommendations, if they are going to do so at all. If, after a over a year, the householder had not followed the recommendations it was assumed that the HEC report had not, and by itself would not encourage them to apply for a grant.

In Bristol 0.9% of those that had completed a HEC prior to 31st March 2003 were referred to the Warm Front scheme.

In the Mendip area, 5.1% of households that had completed a HEC prior to 31st March 2003 were referred to the Somerset Warm & Well scheme.

Carbon savings made

Using the tracking systems in place, the number of measures installed through the Somerset Warm & Well and Warm Front schemes was compiled and the resulting carbon savings calculated.

Carbon savings made as a result of insulation measures installed through the Warm Front scheme during this project are estimated to be 74.4 tonnes over the lifetime of the measures. As, at the time of writing this report, the results of 4 out of the total 31 referrals made to the Warm Front scheme were outstanding, this figure is an estimate. The estimate was calculated by calculating the average carbon savings per referral where the outcome of the referrals has been known and multiplying this average by the number of referrals made. The figure of 74.4 is a worst-case scenario estimate as the information supplied by the Warm Front surveyor does not state whether loft insulation to be installed is full loft insulation or top-up loft insulation. Since anecdotal evidence suggests that the majority of householders have some loft insulation, for the purposes of the carbon calculations, it has been assumed that all loft insulation measures have been top-up insulation measures, although it is very likely that a small percentage of them will actually be full loft insulation measures and therefore achieve greater carbon savings.

The carbon savings made as a result of referrals to the Somerset Warm & Well scheme are estimated to be 288.72 tonnes over the lifetime of the measures. Again, this figure is only an estimate due to the outcome of only 14 of the 36 referrals being known. Again, where the outcome of the referrals has been known, the figures have been used to calculate an average saving per referral.

Thus the total estimated carbon savings as a result of this project is 363.12 tonnes over the lifetime of the measures.

Quantifying the cost of referral

Using the results of the project it was possible to quantify the cost of making a referral to the Somerset Warm & Well scheme a) by providing follow-up advice in writing and b) by providing follow-up advice by phone. The approximate costs calculated are:

Costs of referral resulting from contacting householder in writing = £26

Cost of referrals resulting from contacting householder by phone = £150

The costs only take into account the time spent

- sorting data obtained from DAX
- contacting households
- making referrals

It does not take into account time spent on project management and tracking results. This is because now that the systems and method have been developed, were the methods to be used in the future, project management time will be minimal and, unless there is any requirement to report in detail on the results, time spent tracking referrals will also be minimal. Thus, the costs given can be used to evaluate the cost effectiveness of generating referrals both by contacting households in writing and by phone, compared to other methods used by grant schemes.

The cost of generating referrals to the Warm Front scheme has not been calculated since the written information sent to householders in Bristol varied slightly from that sent in Mendip, to reflect the availability of a council grant that can potentially provide funding towards heating system improvements. Thus, a large proportion of the time

spent processing the response from the mailout was spent informing households of this scheme. As a result, it is not possible to accurately calculate how much time was spent in dealing with households that could potentially benefit from the Warm Front grant. However, as the methods used to contact households were the same in all other respects and no significant difference was found between the referral rates to the two schemes, it can be assumed that the cost of generating referrals to the Warm Front scheme is similar to that calculated for generating referrals to the Somerset Warm & Well scheme.

Working with Energy Efficiency Commitment schemes

As part of this project we originally proposed to meet with managers of Energy Efficiency Commitment (EEC) schemes funded by fuel suppliers to discuss the possibility of setting up a grant scheme in Bristol that allowed the EEAC to make direct referrals to it. This would make the referral process for householders simpler, thus hopefully encouraging more to apply. However, since starting this project, Bristol City Council was approached by a number of funders hoping to provide an insulation scheme in the Bristol area. After much debate, the council decided to endorse the HEAT Project. The HEAT Project was launched in September 2004 in Bristol and provides free loft and cavity wall insulation to all homeowners/private tenants in receipt of qualifying benefits. Those not eligible for a full grant can apply for a substantial discount on insulation measures. The EEAC is able to make direct referrals to the scheme on behalf of households should they request it. Prior to the launch of the scheme CSE met with the managers of the scheme and will continue to work with them and Bristol City Council to make sure that it runs as smoothly and effectively as possible in the area.

Dissemination of results

The findings of this report will be disseminated by CSE via its website, newsletter and email news bulletins. CSE will also present the findings to the other local authorities in the area. The final report will be sent to the advice team at EST who are currently assessing other ways in which the EEAC network could achieve further carbon savings, including savings made through follow-up advice. The findings will also be presented as and when appropriate to other interested parties and organisations by all partners involved in the project.

h) Key issues and lessons learnt

Were this project to be continued/implemented in other areas, there are several changes that would be recommended.

- A high proportion (22.6%) of referrals made to the Warm Front grant were not successful for various reasons. Thus, it would be recommended that the original form sent to households be amended so that it asked more detailed questions. The effect of this would hopefully be a greater percentage of successful referrals due to the higher quality of the information provided by the householder, although the number of forms returned may diminish slightly due to its increased length and complexity, discouraging some householders from completing it.
- If measures installed as a result of referrals need to be calculated for a final report, then it is recommended that the final referrals made are made at least three months before the report has to be completed. This is due to the waiting times experienced with many grant schemes and so results of referrals made may not be available for a number of months. This was not possible with this project due to it only being a six-month feasibility project and thus assumptions of measures to be installed based on the success of a sample of referrals had to be made.
- To speed up the process of calculating the results, various minor changes would be made to the recording and tracking systems used in the study. This would include amending the spreadsheets used to allow only set answers to be added to certain

columns and thus allowing the use of the Excel auto filter command during the tracking and evaluation stage. Also, the forms sent out to householders would be colour-coded depending on whether they had a resident over 60 and/or on benefits. This would make it instantly clear which list they are on when it came to logging their response.

i) Recommendations for implementation (or reasons why not to be implemented – as appropriate) including estimate of carbon savings possible if implemented

In other geographical areas the method used in this study could provide a valuable number of referrals to grant schemes, thus resulting in increased measures installed and carbon savings made. Carbon savings achieved would most likely be greater in areas where qualifying criteria for local grant schemes are broader, allowing a higher number of contacted households to apply/be referred for a full grant.

Although this project has generated a number of referrals to grant schemes, we will not be seeking funding to implement it further in other areas of the Bristol & Somerset EEAC territory. This is primarily due to the nature of the Somerset Warm & Well grant scheme which has been running throughout Somerset since October 2003. To apply for the scheme, householders have to complete a HEC. Due to the way in which the HEC data is recorded and the fact that numerous versions of the HEC are used for a variety of purposes, it would be very difficult and time-consuming to determine which of the HECs for any given area had also acted as Somerset Warm & Well application forms and which did not. This would make it difficult to assess which households may require further advice and information in order to apply for a grant and which were already in the process.

In the Bristol & Somerset EEAC territory, the only local authority that is not part of a Warm & Well scheme is Bristol City Council. The Council has been pleased with the results of the project and via its service level agreement with the EEAC will now fund the EEAC to continue contacting vulnerable households in Bristol and encouraging them to apply for the most appropriate grant. This is expected to be a particularly valuable exercise since the launch of the HEAT Bristol scheme in September 2004. The HEAT scheme is the first of its kind in Bristol and has broader qualifying criteria than the Warm Front grant, thus making more households eligible for a full grant for loft and/or cavity wall insulation. As the vast number of vulnerable households identified as potentially benefiting from loft and/or cavity wall insulation that contacted the EEAC between April 2002 and April 2004 have already been contacted via this project, continuing the work on a rolling basis will be relatively low cost and thus not suitable for full implementation funding.

j) Conclusions

2,823 households that had previously received a HEC report from the Bristol & Somerset EEAC were contacted as part of this study. Contact was made either by phone or in writing to encourage them to apply for the grants and discounts they are entitled to, to install energy-saving measures. 67 of the households contacted were referred for a grant for loft and/or cavity wall insulation.

On the assumption that if a householder had not followed the recommendations of their HEC report a year after its receipt then they were not going to, those households that had completed a HEC prior to 31st March 2003 were considered. In Bristol 0.9% of households contacted were referred for a Warm Front grant, while in Mendip 5.1% were referred for a Somerset Warm & Well grant. In Mendip this is above the 5% response rate taken to be a 'good' rate as a market research standard. There is no clear reason why the referral rate is higher in Mendip than Bristol, but it could partly be due to an increased awareness in Mendip of the benefit of cavity and loft insulation

resulting from the relatively heavy marketing of the Somerset Warm & Well scheme in the area over the last year. Although the rate is lower in Bristol, the method will continue to be used as in total 31 Bristol households were referred for a grant. Of these most had completed their HEC after 31st March 2003, but there is no evidence to suggest that given further time they would have followed the recommendations given in their HEC report. The follow-up contact will be done on a rolling basis and it is hoped that householders will be contacted while they still remember the content of their HEC report and are thus more likely to be interested installing measures. Also, since the recent launch of the HEAT Project in Bristol, a higher proportion of households are likely to be eligible for a full grant, thus increasing the number of referrals.

Looking at all households contacted, the effectiveness of following up householders in writing does not appear to significantly differ from the effectiveness of following them up with a phone call. Neither does the effectiveness of these two methods significantly differ between Bristol (an urban area) and Mendip (a rural area).

However, households in Mendip do appear to be significantly more likely to install loft and/or cavity wall insulation following the receipt of a HEC report. There is no single reason for this and it may be due to a combination of factors. These could include:

- A higher proportion of properties in Mendip being suitable for cavity wall insulation.
- The existence of an active Care & Repair organisation in Mendip that appeared to have helped some households access grants. (Although there is also a Care & Repair organisation in Bristol, they have a much larger catchment area and thus may be relatively less well known in Bristol).
- The launch of the Somerset Warm & Well scheme in Mendip and the relatively heavy marketing of the scheme by both the EEAC and the installers working on the scheme (a number of households contacted had accessed the Somerset Warm & Well scheme). There has been no one scheme that has been heavily marketed in Bristol in recent years.
- A higher proportion of elderly people living in the Mendip area
 - to whom living in a warm, well-insulated house is of particular importance due to their age and health
 - who are retired and thus have more free time to follow up the actions recommended by the HEC report.

As a result of referrals made to the Warm Front and Somerset Warm & Well grant schemes, the total carbon savings are estimated to be 363.12 tonnes over the life time of the measures. Total carbon savings made as a result of this study though will be higher due to the unmeasurable carbon savings resulting from the provision of advice and information on other grants available and on other energy-saving measures.

Finally, the cost of making a referral to both the Somerset Warm & Well scheme and the Warm Front scheme is estimated to be £23 when the follow-up contact is made in writing and £150 when the follow-up contact is made by phone. As there is no significant difference between the effectiveness of contacting households in writing compared to contacting them by phone, this suggests that it is much more cost effective to follow up households in writing rather than by phone.

Appendix

List of appendices

1. Summary of results
2. Sample of letter sent to householder
3. Sample of enquiry form
4. Summary of carbon savings calculations

1. Summary of results

Households contacted	Total mailed	Total contacted by phone/responded to mailout	% responded to mailout	Already received grant/work completed	No. of insulation referrals made	Total referrals made
Bristol 1W	110	8	7.3	N/A	7	7
Bristol 2W	435	31	7.1	N/A	21	22
Bristol 3W	1272	51	4	N/A	2	4
Bristol total W	1817	90	5	N/A	30	33
Bristol 1V	N/A	5	N/A	2	0	0
Bristol 2V	N/A	42	N/A	0	1	1
Bristol 3V	N/A	48	N/A	13	0	0
Bristol total V	N/A	95	N/A	15	1	1
Bristol total W+V	N/A	N/A	N/A	N/A	31	34
Mendip 1W	79	4	5.06	N/A	3	3
Mendip 2W	138	4	2.9	N/A	3	3
Mendip 3W	522	19	3.6	N/A	19	19
Mendip total W	739	27	3.7	N/A	25	25
Mendip 1V	N/A	13	N/A	7	0	0
Mendip 2V	N/A	78	N/A	12	6	6
Mendip 3V	N/A	81	N/A	16	5	5
Mendip total V	N/A	172	N/A	35	11	11
Mendip total W+V	N/A	N/A	N/A	N/A	36	36

- 1= homeowner/private tenant, under 60, in receipt of benefits
 2= homeowner/private tenant, 60 or over, in receipt of benefits
 3= homeowner/private tenant, 60 or over, not in receipt of benefits

W= householder responded by completing form received in the post (only those that completed the form and were interested in insulation rather than heating are included)
 V= householder contacted by telephone and verbally agreed to referral

2. **Sample of letter sent to householder**

Copy of letter sent out to householders in Bristol (printed on EEAC headed paper).
The letter sent out varied slightly depending on which grant the DAX data suggested the householder was eligible for

Dear (Householder's name)

We at the **Bristol & Somerset Energy Efficiency Advice Centre** are currently trying to make sure that past customers have made the most of the advice we have given them. Our records show that during the last two years, you have completed a Home Energy Check and received our energy efficiency report for your home. They also show that you may be eligible for a Government-funded **Warm Front grant** which can provide up to a maximum of £1500 towards insulation measures. Even if you do not qualify for a grant, you may be eligible for discounted insulation measures and a discounted energy efficient boiler.

If you are interested in receiving a grant or discount, please fill in the enclosed reply form and return in the freepost envelope. We look forward to hearing from you.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Cleo Wilson', with a long, sweeping horizontal stroke at the end.

Cleo Wilson
Bristol & Somerset Energy Efficiency Advice Manager

3. Sample of enquiry form

A4 form sent out to householders in Bristol, printed on coloured paper. The form sent out to householders in Mendip differed slightly to reflect the difference between the different grant schemes available.

Bristol & Somerset Energy Efficiency Advice Centre

ENERGY EFFICIENCY CENTRE FOR SUSTAINABLE ENERGY

Name.....
 Address.....
 Postcode.....
 Telephone number.....

Do you require: Loft insulation Cavity wall insulation Heating improvements
 (please circle as appropriate)

To help us determine your eligibility for any energy efficiency grant or discount, please answer the questions below:
 (please circle as appropriate)

Are you 60 or over?	Yes	No
Do you have any children under 16?	Yes	No
Are you pregnant?	Yes	No
Are you in receipt of any benefits?	Yes	No

If yes, please specify which benefits you receive (not including child benefit)

Are you a home owner or a private tenant?	Yes	No
Have you received a grant from Warm Front?	Yes	No

If we identify you as being eligible for the National Government Warm Front Grant are you willing for us to pass your details onto a Warm Front surveyor? If so please sign and date below.

Signature.....Date.....

If you have any queries or require any further energy saving advice please contact us free on 0800 512 012.

Please use the Freepost envelope provided, or return to: Energy Efficiency Advice Centre, Centre for Sustainable Energy, FREEPOST SWB727, Bristol, BS1 6ZY

4. Summary of carbon savings calculations

A summary of the calculations used to estimate total carbon savings resulting from the grant referrals made.

Warm Front carbon savings

Referrals made to Warm Front	31
Total properties surveyed at time of report writing	27
Estimated carbon savings from surveyed properties	64.8 tonnes
Average saving/property	2.4 tonnes
Estimated carbon savings from 31 properties	74.4 tonnes

Somerset Warm & Well carbon savings

Referrals made to Somerset Warm & Well	36
Total properties surveyed at time of report writing	14
Estimated carbon savings from surveyed properties	112.22 tonnes
Average saving/property	8.02 tonnes
Estimated carbon savings from 36 properties	288.72 tonnes