



# Energy Best Deal

## Evaluation Report, 2012/2013

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## Summary of key findings

The Energy Best Deal programme seeks to inform domestic energy consumers about how they could reduce their energy costs: by changing tariff, payment method and / or supplier and taking up energy efficiency measures, and by providing debt advice. Run by Citizens Advice in England and Wales and Citizens Advice Scotland in Scotland, the programme offers domestic energy consumers and frontline workers (both paid workers and volunteers) the opportunity to attend an information session on getting a better deal on their energy bills.

Between October 2012 and March 2013, 753 sessions were delivered by 170 delivery partners across the 14 regions of the Citizens Advice Financial Capability Forums<sup>1</sup> in England and Wales, and 115 sessions were delivered by 13 Citizens Advice Bureaux in Scotland. In total during 2012/2013, the programme reached 5,602 consumers and 3,334 frontline workers. The programme will have an ongoing impact through the consumer advice work of the frontline workers.

This report describes the results of an evaluation of the 2012/2013 programme. The evaluation was carried out using paper questionnaires completed immediately following the session, and follow-up telephone interviews carried out an average of two months after the session. A total of 5,672 questionnaires and 302 telephone interviews were completed. The ongoing effect of the 2011/2012 programme was also investigated, using a smaller sample of 50 interviews with people who attended Energy Best Deal sessions in 2011/2012.

### Impact of the 2012/2013 programme – consumers

- In total, 5,602 consumers attended the Energy Best Deal sessions, 78% in England, 15% in Scotland, and 8% in Wales.
- Questionnaire responses were received from 3,429 consumers, 61% of all consumers who attended sessions. Of the consumer questionnaire respondents, 76% attended sessions in England, 15% in Scotland, and 9% in Wales.
- Almost all (98%) consumers who responded said they found the session useful.
- Seventy-seven percent of consumers who responded to the questionnaire said they would probably or definitely do something as a result of the session.
- Follow-up interviews with 150 consumers found that 32% had taken action to get a better deal on their energy bills since the session (an average of two months later).
- Consumers were also asked about other actions relating to seeking further advice, energy efficiency and applying for grants and other support. When these actions are also taken into account, 69% of consumer interviewees took some kind of action following the session.
- Sixty-nine percent of the consumers interviewed who looked for a better deal found one (equal to 22% of all interviewees)
- Twenty-eight percent of consumer interviewees had taken some kind of action to save energy in their home, as a result of the session.

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<sup>1</sup> The Financial Capability Forums are open to all organisations in a region with an interest in financial education. They meet quarterly and provide a way for member organisations to share experiences and resources and to develop new partnerships.

- Eight percent of consumer interviewees had started the process of installing a major energy efficiency measure (mainly wall and loft insulation) following the session.

### **Impact of the 2012/2013 programme - frontline workers**

- In total, 3,334 frontline workers attended Energy Best Deal sessions; 80% in England, 7% in Scotland, and 12% in Wales.
- Questionnaire responses were received from 2,243 frontline workers, 67% of all frontline workers who attended sessions. Seventy-nine percent attended sessions in England, 7% in Scotland, and 14% in Wales.
- Ninety-eight percent of frontline workers said they felt better informed following the session.
- Eighty-three percent of frontline workers said the session had changed their opinion on the importance of fuel poverty for the people they work with.
- Thirty-one percent of frontline workers estimated that between 60% and 80% of their clients were experiencing, or were at risk of, fuel poverty. A further 20% estimated this figure to be 80%- 100% of their clients.
- Following the session, 95% of frontline workers said they felt more confident advising on at least one of the topics covered in the presentation.
- Of the 152 frontline workers who were interviewed two months after the session, 69% had given advice on getting a better deal on energy supply, and 59% had advised on changing payment method.
- In the average of two months since the session, frontline workers had passed on information from the session to a median of ten clients. On average this represented almost 40% of the clients they had seen in this time.

### **Ongoing impact of the 2011/2012 programme**

- Follow-up telephone interviews were conducted with 25 consumers and 25 frontline workers who attended Energy Best Deal sessions in the previous campaign, 2011/2012.
- Of the 25 consumers interviewed, seven had switched following last year's session, and a year later are still happy that they made the decision to switch and have all saved money.
- Since the last interview, ten of the 25 consumers have taken further action to get a better deal. Seven of these cited the Energy Best Deal session as an influence on their decision to check prices again.
- Twenty-one of the 25 frontline workers interviewed had continued to use information from the Energy Best Deal session over the year since the session.
- Twenty of the 25 frontline workers said they felt they would benefit from a refresher session on the same topics.

### **Energy Best Deal Extra**

- Seventy-seven Citizens Advice Bureaux were involved in delivering one-to-one 'Energy Best Deal Extra' advice appointments to a total of 2,084 clients.
- Thirty out of thirty-three people who attended an advice appointment and who were interviewed said they found it useful.
- People who attended Energy Best Deal Extra advice appointments were given advice about or directly helped with the following: switching supplier, saving energy, Warm Homes Discount,

Priority Services Register, resolving disputed bills, changing their meter, and saving money on water bills.

# The Energy Best Deal programme

Energy Best Deal is a consumer campaign developed by Ofgem and run by Citizens Advice in England and Wales and Citizens Advice Scotland in Scotland. For 2012/2013 the campaign was funded by EDF Energy, E.ON, ScottishPower, and Scottish and Southern Energy. Together they gave a total £400k to fund Energy Best Deal. This was £200k less than the previous campaign, which was funded by six major energy suppliers.

Energy Best Deal provides trainer-led group sessions to frontline workers and consumers. Sessions raise awareness on how to:

- reduce energy costs by switching tariff, payment method and/ or supplier;
- get help from suppliers and government if paying energy bills is a struggle; and
- save money by being more energy efficient at home.

The Energy Best Deal programme started with a pilot funded by Ofgem in 2008 and was then rolled out across England and Wales; it has been running annually in England and Wales since then. In Scotland, Energy Best Deal was first delivered in 2010/2011 by Consumer Focus Scotland to frontline workers only. The 2011/2012 campaign was the first to be delivered by Citizens Advice Scotland and reached both frontline workers and consumers.

Between October 2012 and March 2013, 753 sessions were delivered by 170 delivery partners across the 14 regions of the Citizens Advice Financial Capability Forums<sup>2</sup> in England and Wales, and 115 sessions were delivered by 13 Citizens Advice Bureaux in Scotland. In total during 2012/2013, the programme reached 5,602 consumers and 3,334 frontline workers.

As the current Energy Best Deal Programme got underway, Citizens Advice obtained funding for a number of Bureaux to provide one-to-one follow-up advice appointments, called 'Energy Best Deal Extra'. These were offered primarily to attendees of Energy Best Deal sessions, although were also provided to people through other channels such as referral by a case worker or attendance at a Financial Capability session. Energy Best Deal Extra ran from January 2013 to April 2013.

## Methods

A survey of consumers was conducted at the end of each session using a self-completion questionnaire distributed by the trainer. The delivery partner then input this information into an online form using the web tool 'Survey Monkey'. The web tool collated the responses into a spreadsheet format which was then passed to the evaluator. The total number of valid responses from consumers was 3,429.

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<sup>2</sup> The Financial Capability Forums are open to all organisations in a region with an interest in financial education. They meet quarterly and provide a way for member organisations to share experiences and resources and to develop new partnerships.

A survey of frontline workers was conducted in the same manner. The total number of valid responses from frontline workers was 2,243.

In both the consumer and frontline worker questionnaires, some respondents omitted answers for some questions, and so all the percentages given in this report are calculated as percentages of the total number of respondents who gave answers for the relevant questions.

An average of two months after the session, a telephone survey of consumers (n=150) and frontline workers (n=152) was carried out, using information provided on the self-completion questionnaires.

The ongoing effect of the 2011/2012 programme was also evaluated, using telephone interviews with 25 consumers and 25 frontline workers who attended Energy Best Deal sessions in 2011/2012.

The questionnaires and interview questions were designed by the Centre for Sustainable Energy, with input from Citizens Advice and Ofgem.

Analysis of the 2012/2013 questionnaires and interviews was undertaken using the statistical analysis software package SPSS. In order to assist statistical analysis, the questionnaires and interview schedules consisted mostly of closed questions, with a limited number of open questions.

This report shows the results for England, Scotland and Wales combined. Results for the individual countries are reported in an appendix, to be published separately, and in presentations in each country.

The evaluation of the main Energy Best Deal programme was expanded to cover Energy Best Deal Extra. People who attended Energy Best Deal group sessions and who expressed an interest in having a follow-up one-to-one advice session were contacted and asked a set of questions about their experience of the one-to-one session and whether it had benefited them. The target number of interviews was 40.

# Consumers: questionnaire responses

## Demographic information

In total questionnaire responses were received from 3,429 consumers who attended the Energy Best Deal sessions: 76% of these were from consumers in England, 15% in Scotland, and 9% in Wales. This represents 61% of the 5,602 consumers who attended Energy Best Deal sessions. Figure 1 shows how the questionnaire responses were divided between the three countries, while Figure 2 to Figure 4 show demographic characteristics of the consumer respondents<sup>3</sup>. A breakdown of the questionnaire results by country can be found in the Annex Report.

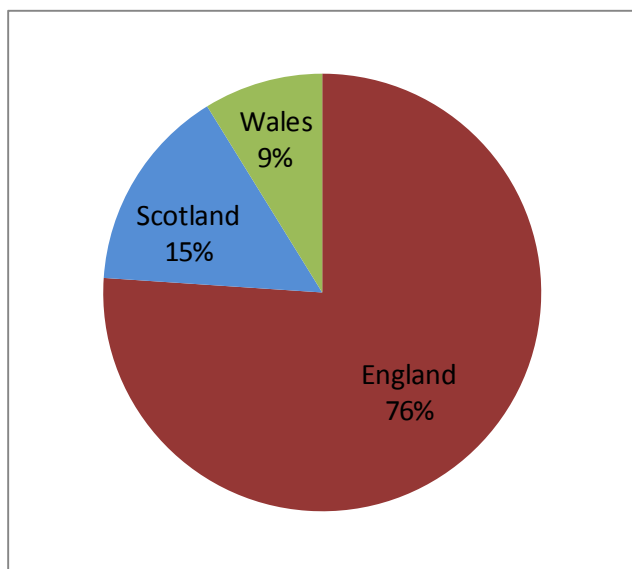


Figure 1: Country of respondents

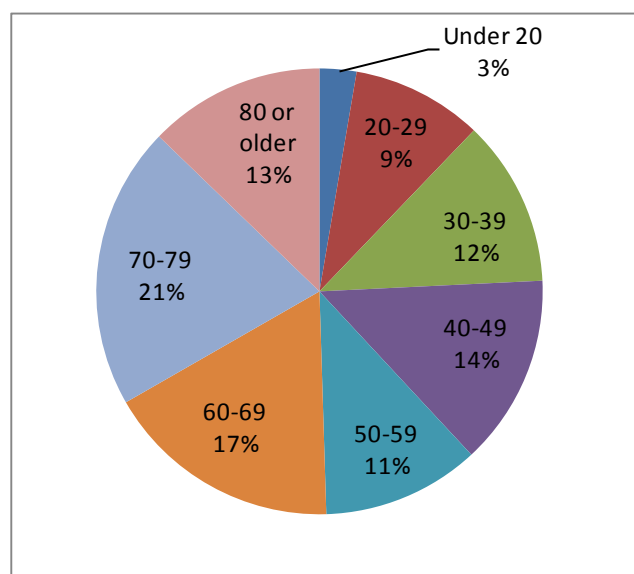


Figure 2: Age of respondents

<sup>3</sup> Not all respondents answered all questions on the questionnaire forms. Throughout this report, the results are shown as percentages of those that answered the specific question.



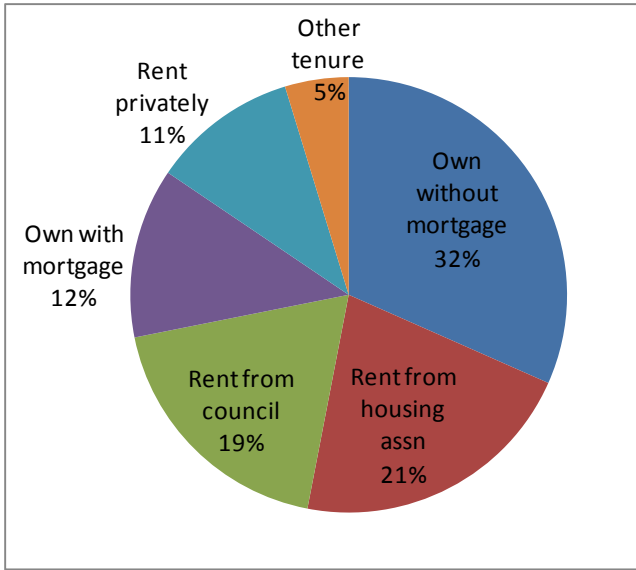


Figure 3: Tenure of respondents

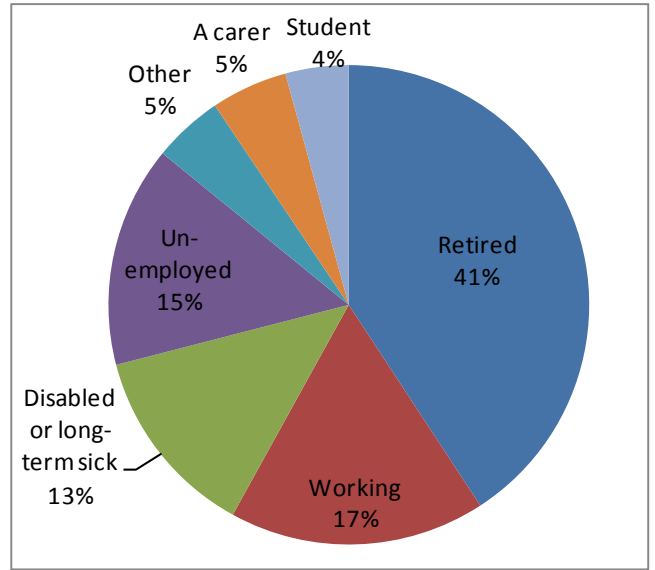


Figure 4: Occupation of respondents

### Attitudes to bills

To find out how consumers coped with heating their home in winter, they were asked two questions. The first asked whether they were able to heat their home to a comfortable level (Figure 5) and the second about their winter fuel bills (Figure 6). Forty-one percent of respondents said they were not able to heat their home to a comfortable level, with the majority (33%) saying they did not use the heating as much as they would like due to the cost and a small minority (8%) said that even with the heating on it would not get warm enough. On top of this, only a fifth (19%) said that they had no concerns about their winter fuel bills. Twenty percent said they found their winter bills a financial strain, and a small minority (6%) said that their winter bills were impossible to manage and they were in debt to their fuel supplier.

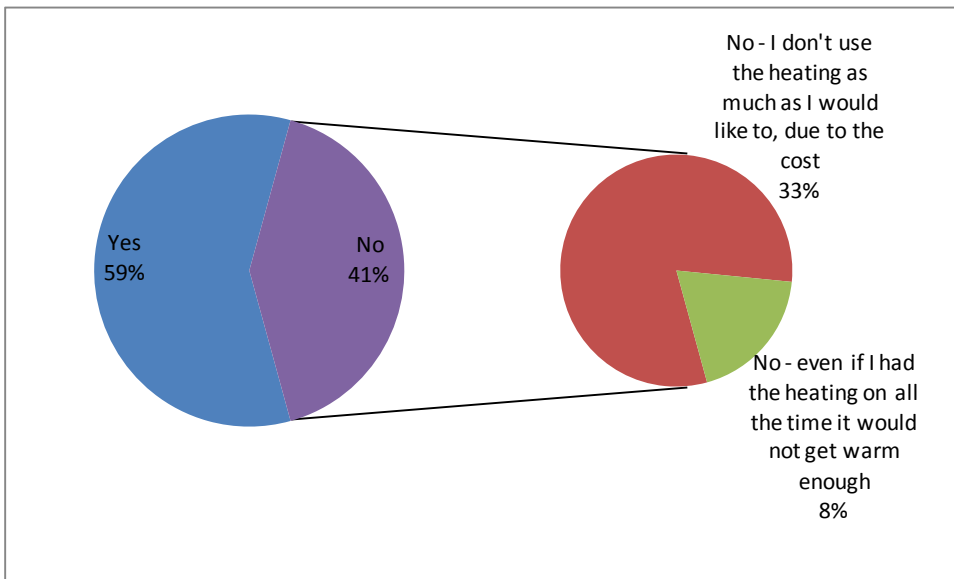
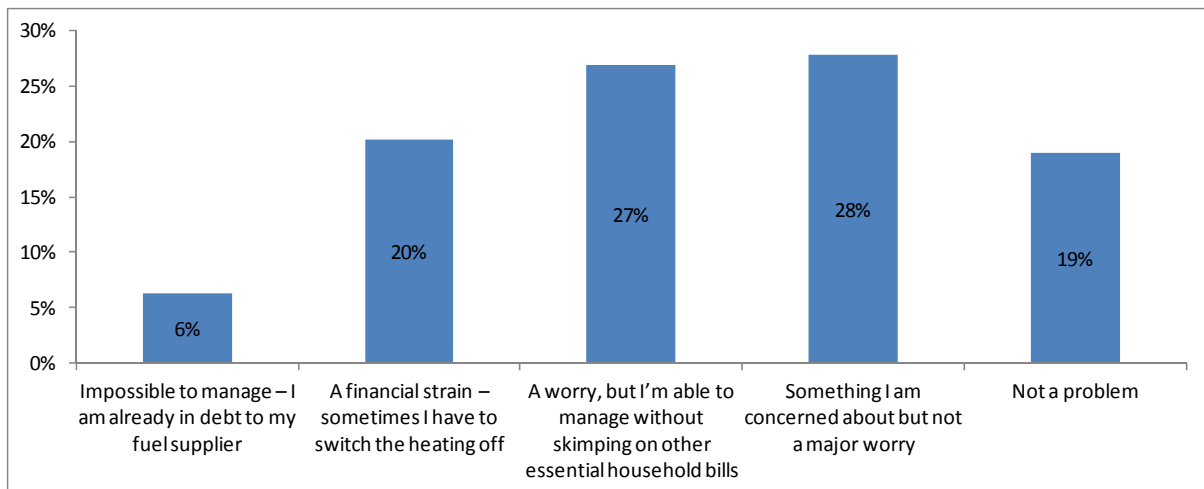


Figure 5: Can you heat your home to a comfortable level in winter?



**Figure 6: Attitudes to winter fuel bills**

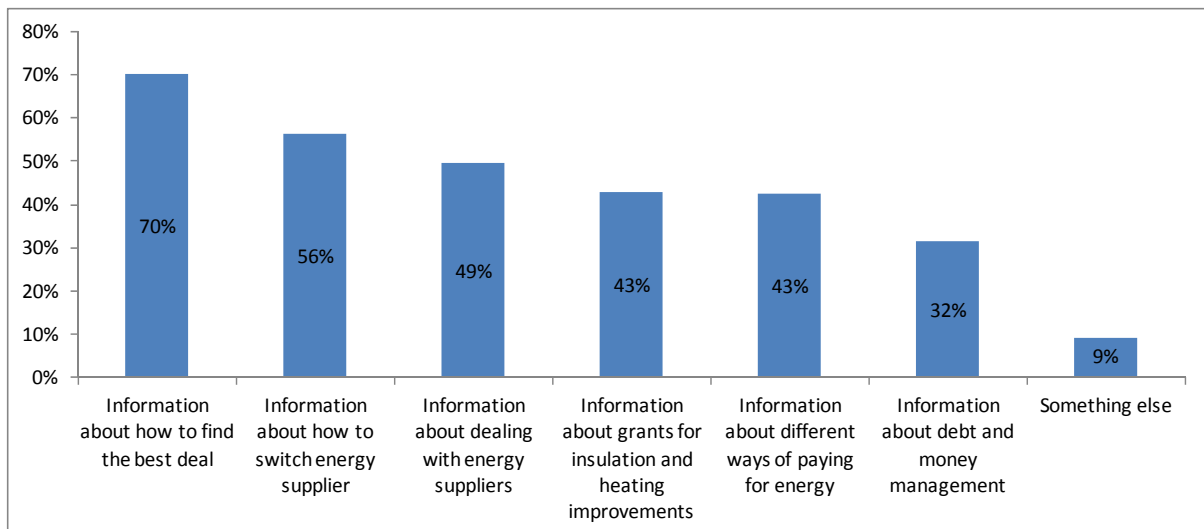
### **Experience and knowledge of switching prior to the session**

Ninety-one percent of consumers already knew that it was possible to switch energy supplier. This is slightly higher than the 90% reported last year, and 88% the year before. Thirty-five percent of respondents had already switched suppliers *once* in the past, while a further 20% had switched more than once, making a total of 55% who had switched in the past. Nearly two thirds (59%) of those who had switched in the past were proactive switchers, having switched of their own initiative to get a better deal, while the rest were reactive switchers, switching in response to an approach from a fuel company salesperson. Those switching as a result of an approach by an energy supplier salesperson may not have considered the full range of tariffs available to them before switching.

Fifty-nine percent of respondents said they had never switched to a different tariff with the same supplier, while 22% had done so and the other 18% did not know whether they had or not.

### **The impact of the session**

Ninety-eight percent of those who answered said they found the session useful (this question was left unanswered by 246 people, equal to 7% of respondents). Figure 7 shows what consumers said they found useful about the session. Information about how to find the best deal was considered useful by the highest number of people (70%) and information about how to switch was the second most useful (56%).



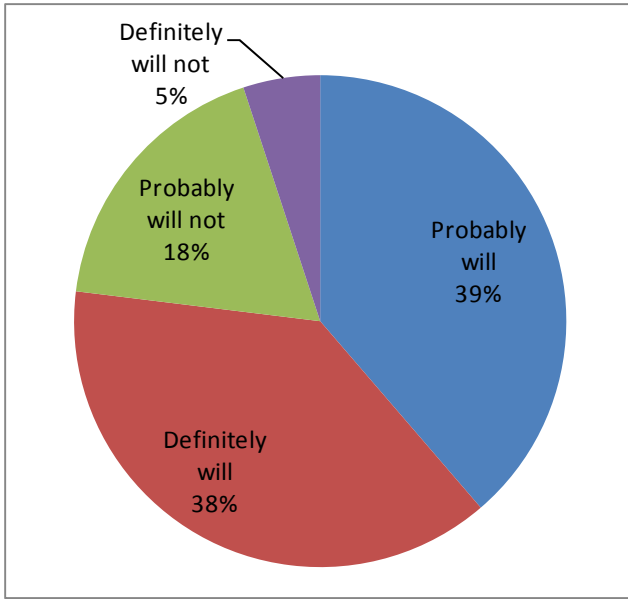
**Figure 7: What did you find useful about the session?**

Responses given under 'something else' included:

- Information on energy efficiency, keeping warm and changing habits
- Getting advice from an independent person and being signposted to impartial sources of information
- Being able to get information and ask questions in a safe, non-judgemental environment and hearing other people's experiences
- Information about the Priority Services Register, the Warm Homes Discount, the Cold Weather Payment and Charis grants
- Information about benefits
- Information about budgeting
- Understanding bills and estimated bills
- Finding out it was possible to switch even with a debt
- Information about consumer rights

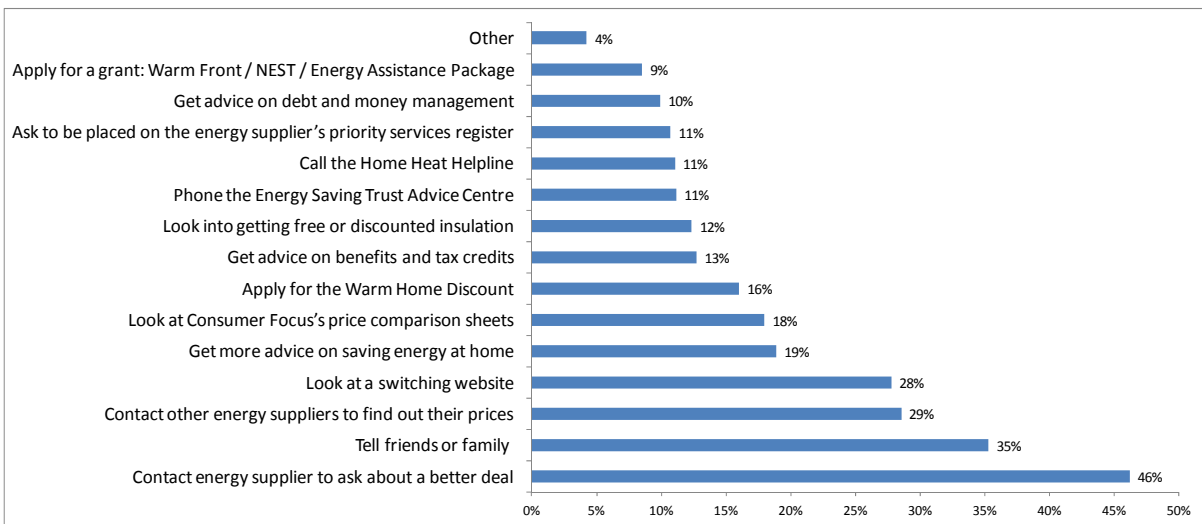
### **Planned follow-up actions**

Seventy-seven percent of people said they would definitely or probably do something as a result of the session, as illustrated in Figure 8.



**Figure 8: Will you do anything as a result of the session today?**

Consumers were asked what they planned to do as a result of the session. The responses are shown in Figure 9. Contacting the current energy supplier was the most popular planned action (46% of respondents), while contacting other energy suppliers and looking at switching websites were also popular, at 29% and 28% respectively. Comments given under 'Other' included having following up appointments at local Citizens Advice Bureaux, sharing information with local groups, discussing with partner and family, using less energy, submitting meter readings more frequently, and seeking advice on consumer rights.



**Figure 9: Planned actions following the session**

## Consumers: follow-up interviews

From the set of consumers who had completed questionnaires with contact details, 150 were selected at random to take part in a follow-up interview, an average of two months after attending a session. Eighty percent (120) were from England, 7% (10) were from Scotland and 13% (20) were from Wales.

### Action taken since the session

In the interview, consumers were asked whether following the session they did any of the following:

- found out about prices from suppliers
- changed payment method
- looked for more information about energy efficiency or improving their heating system
- Applied for Warm Front, free or discounted insulation, or the Warm Homes Discount
- Sought advice on benefits, tax credits, debt or money management
- Asked to be placed on the Priority Services Register
- Took any steps to save energy in their home (specifically prompted by the EBD session)

Each of these is discussed separately in the following sections. However, overall across all actions, a total of 103 people (69%) had taken at least one of these actions. Even where consumers had not taken action (47 people), more than half (25) had told family and friends about something they had learnt at the session. The comments of those who had not taken action following the session were quite interesting: many people said it was interesting and informative even though they had not taken action. Some people said they had already taken actions such as applying to Warm Front before the session. Two people said they planned to do something but had not got round to it yet. One person said that the session she attended had too much of a focus on using internet comparison sites, which was not useful for her as she did not have internet access<sup>4</sup>.

### Looking for a better energy tariff

Forty-eight people (32% of all interviewees) had looked for a better energy tariff since the session. Forty-three (29%) people contacted their existing supplier, while 32 (21%) checked prices from different suppliers: these groups overlapped because 27 (18%) people checked prices from both their existing supplier and others.

Eighteen of the people who looked for a better tariff had switched supplier once in the past. Eleven had switched more than once. The remaining 19 had never switched in the past. Seven of these had never even changed to a different tariff with the same supplier.

Figure 10 shows the number of interviewees who checked prices, the number who were offered a better deal, and whether they switched or intend to switch to the better deal. They are colour-coded to show whether it was the current supplier, a new supplier, or both, that was approached or which offered a better deal. The first column shows the numbers that checked prices: those that checked

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<sup>4</sup> Although the use of internet comparison sites is covered in the session, it is not normally the main focus, and so the session that this consumer attended happened to have an unusually strong focus on comparison sites.

only their current supplier's (blue), those that checked other suppliers' prices but did not contact their current supplier directly (red), and those that did both (green). The second column shows where the better deals came from: blue shows the number that were offered a better deal by their current supplier only, red shows those that were offered a better deal by a different supplier, and green shows the number that were offered a better deal by both. The next two columns show the deal that was actually taken up (or intended to take up soon), split into red for a deal from a new supplier and blue for a deal from an existing supplier.



**Figure 10: Looking for a better deal: results**

Figure 10 shows that 33 of the 48 people who checked prices found a better deal (69%) and that 70% of those who were offered a better deal switched to it.

Where interviewees checked prices from different suppliers, they were asked what sources of information they used. Twenty-six people (81% of all people who checked prices from a different supplier) used a price comparison website, while the following actions were each done by one person:

- Looked at other suppliers' websites
- Phoned other suppliers
- Looked at Consumer Focus's price comparison sheets
- Obtained further help from an advisor
- Asked friends or family
- Saw an energy supplier with a stand at shopping mall
- Responded to a telephone call from a supplier
- Switched from current electricity supplier to current gas supplier, to obtain dual fuel tariff

How did interviewees satisfy themselves that the tariff offered really was a better deal? Of the 21 people who had been offered a better deal by their current supplier, 11 relied on the supplier to

work out what was the best deal and did not check prices from other suppliers. Therefore they may have obtained the best deal their own supplier had to offer but missed out on the best tariff for them on the market. Of the 32 that checked prices from a new supplier, most had shopped around using price comparison services or by contacting other suppliers. However, two people had switched as a result of an approach from a supplier (one sales call, one stall at a shopping centre).

Contacting a different supplier was more likely to reveal a better deal than looking at the prices of the current supplier<sup>5</sup> (18 out of 32 people who checked prices from other suppliers were offered a better deal, as opposed to 21 out of 43 who contacted their own supplier being offered a better deal). Consumers were more likely to take up (or plan to take up soon) a better deal offered by a different supplier (12 out of 18 people) than offered by the same supplier (11 out of 21). There were six consumers who were offered a better deal with both their own and another energy supplier. Two of these switched to a different supplier with another planning to do so soon, while one of these had switched to a better tariff with their current supplier and a further two planned to do this shortly. Therefore three have chosen to stay with their current supplier while three have chosen to change supplier.

The 23 interviewees who switched or intended to switch to the better deals they had found were asked how much they expected to save. Twelve people had an idea of how much they would save. The largest amount saved was £100 per month while the smallest was £50 per year. On average the expected saving was just under £260 per year.

Of the 23 people who switched or intended to switch, eight had never switched supplier before, with five of these never even having switched to a different tariff with the same supplier. Eight had switched once in the past and seven had switched more than once.

### **The process of switching supplier**

Of the 19 people who had already switched to a new deal, ten found the process 'very easy', and one found the process 'very difficult'. When asked for comments about what they found problematic, comments included:

- The original supplier had objected or made the process difficult
- Getting a refund from the previous supplier on direct debit had proved time consuming
- Understanding what people were saying on the phone was difficult

When asked what they found helpful about the process of switching, eight people had positive comments, including that the suppliers were helpful, did the switching process for them, and that the process was smooth.

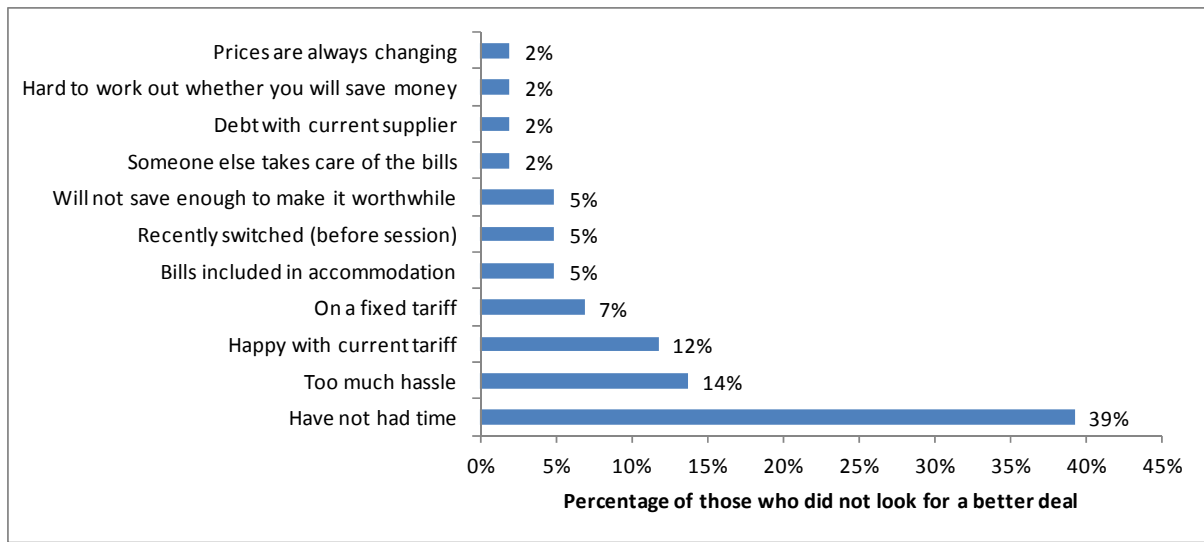
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<sup>5</sup> Last year's evaluation found the opposite; better deals were found from the current supplier.

## Factors which discouraged people

One hundred and two interviewees did not look for a better deal. They were asked what put them off, and the reasons they gave are shown in Figure 11. Only reasons given by more than one person are shown (and some people gave more than one answer). Reasons given by only one person each included:

- Being about to move house
- Having been ill
- Needing help with switching due to blindness



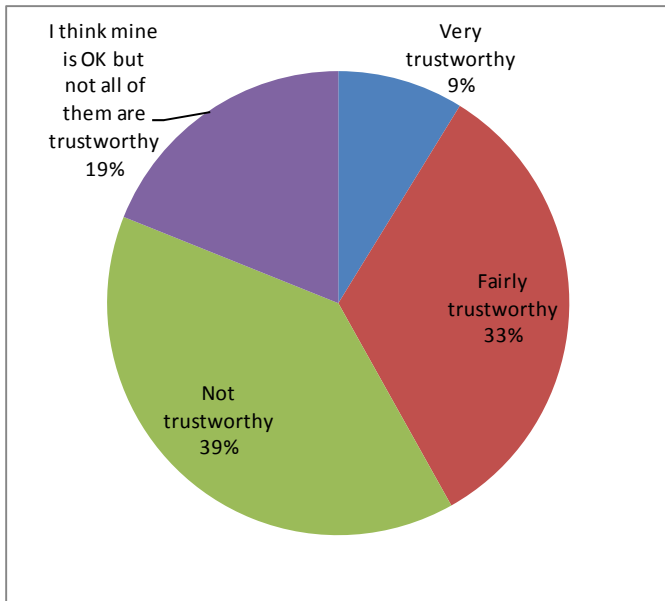
**Figure 11: Factors which put people off looking for a better deal**

Ten people found a better deal but did not switch: two of these people were planning to do more research before making a decision, and another had been offered a deal which was only marginally better than the current one, so decided not to switch.

## Trustworthiness of energy companies

Interviewees were asked how trustworthy they perceived energy companies to be, in general. They were given the options: very trustworthy, fairly trustworthy, not trustworthy, and 'I think mine is ok, but not all of them are trustworthy'. The responses are shown in Figure 12. The majority of respondents gave a positive response, although almost a fifth felt positive about their own supplier but not others.





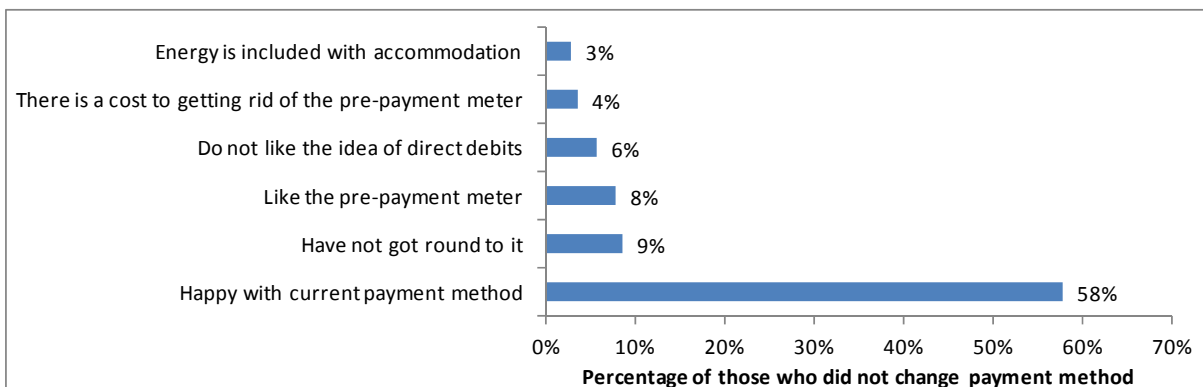
**Figure 12: How do you rate the trustworthiness of suppliers?**

### Payment method

Nine people (6%) had changed the way they paid for their energy since the session; eight had changed the way they paid for their gas and electricity, and one had changed the way they paid for electricity only. The majority changed to a direct debit payment method, with one changing to paying when the bill arrived. The reasons given for not changing payment method are shown in Figure 13. Only reasons given by more than one person are shown; some people gave more than one reason. Reasons given by only one person each included:

- One person did not have a bank account, which limits the payment options
- One person was planning to switch and would then change payment method
- One person was about to move house

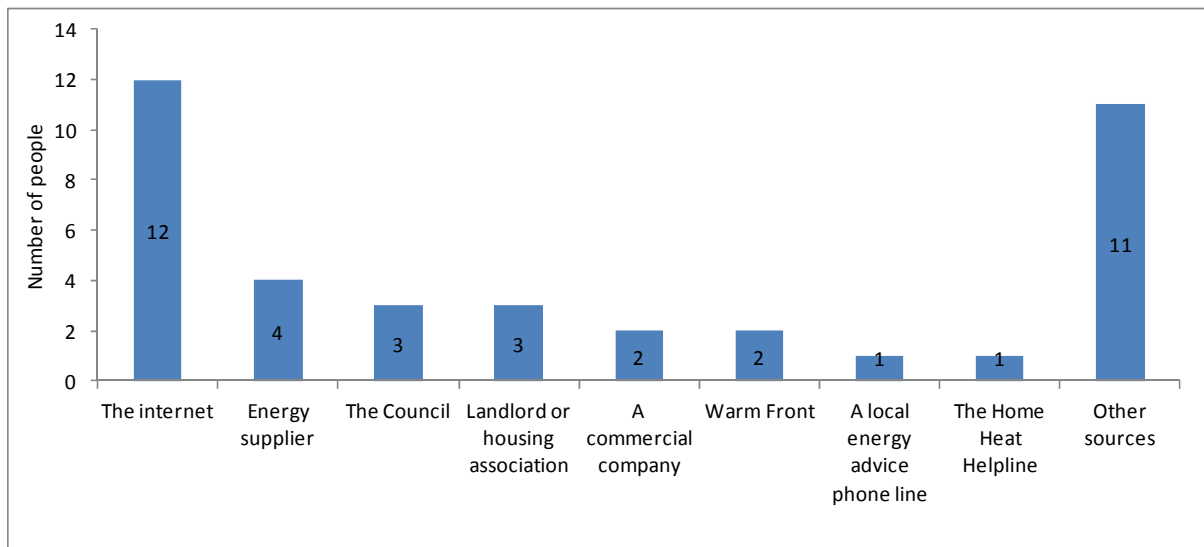
Most people thought that their current payment method was the best for them. One person commented that direct debits, generally considered the best payment method, are difficult to manage when living on benefits.



**Figure 13: Reasons for not changing payment method**

## Energy efficiency actions

Interviewees were asked if they had looked for any more information on improving their home energy efficiency or heating system since the session, and whether they had done so as a direct result of the session. Twenty-eight percent of interviewees had done so, as a result of the session, with a further 4% also having looked for information but not attributing this to the Energy Best Deal session. Figure 14 shows the sources of information that were used (only covering those who had looked for information as a result of the session). The internet was by far the most common source of information.



**Figure 14: Sources used to find further information on energy efficiency and heating improvements**

'Other sources' included a local debt advice centre, an EPC report, newspapers, Age UK, the delivery partner following the session and advertising material for insulation schemes.

Interviewees were asked if they had taken any steps to save energy in their homes since the session, and whether this was prompted by the Energy Best Deal session. Seventy-eight people (52%) said that they had done something, although ten of these said their action had not been a direct result of the Energy Best Deal session. Where interviewees named an action, these are shown in Figure 15. The majority identified low- or no-cost actions such as reducing appliance use (28 people), installing low energy light bulbs (15 people), draught proofing (2 people) or adjusting their heating controls (20 people). Two people were currently investigating the possibility of getting loft or wall insulation, one person checked their property's insulation and found it was already insulated, and one person was turned down for discounted insulation because she lives in a housing association property (all of these are included under 'Looked into insulation' in Figure 15). A further five people installed cavity wall insulation, loft insulation or both, and one person was investigating solid wall insulation. Two people received replacement boilers (one through Warm Front). This is a total of twelve people looking into installing or having installed larger scale measures, equal to 8% of all interviewees.

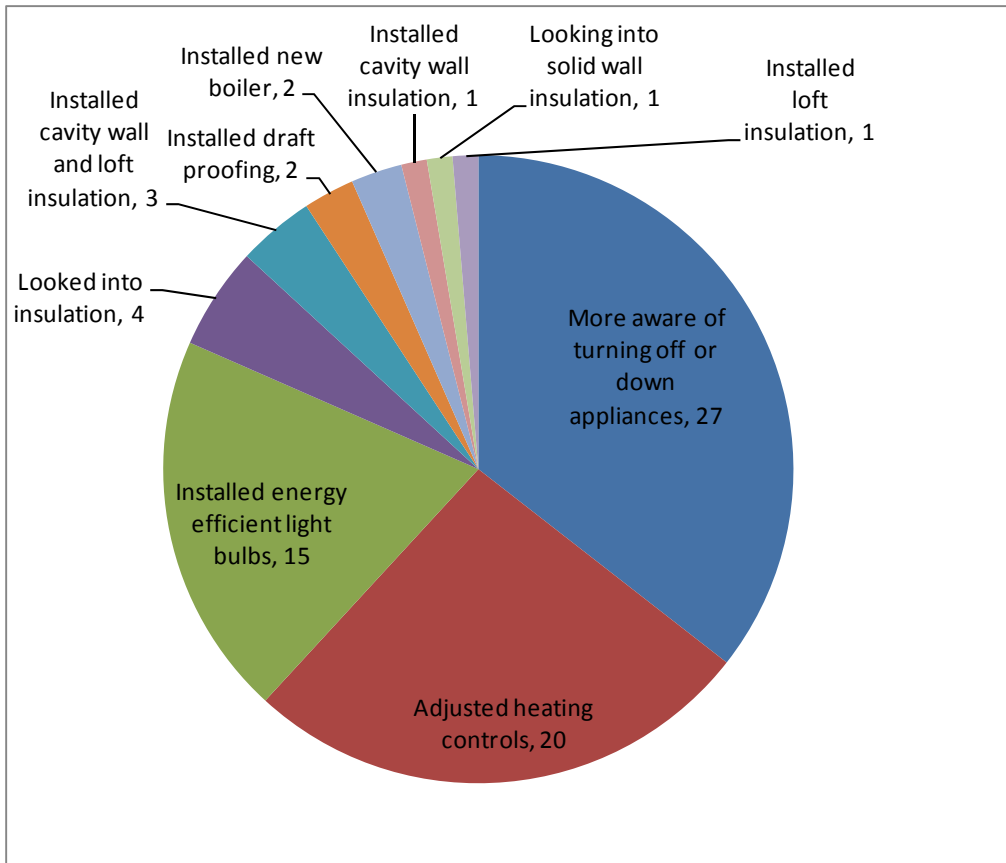


Figure 15: Energy efficiency actions taken

### Identifying consumers qualifying for ECO<sup>6</sup> Home Heating Cost Reduction Obligation

Consumers were asked two basic questions about benefits and income. The interview questions were designed during a transition period between two energy supplier obligations, CERT and ECO. Therefore the questions were designed to ascertain which consumers met the most common qualifying criteria for CERT, with the understanding that ECO Home Heating Cost Reduction Obligation (HHCRO) would be likely to have similar qualifying criteria. Interviewees were asked<sup>7</sup>:

- Does anyone in your household receive either Pension Credit or Child Tax Credit?

<sup>6</sup> The ECO is the Government's new domestic energy efficiency programme which has replaced the CERT and CESP programmes, both of which came to a close at the end of 2012. Under the Home Heating Cost Reduction Obligation, "suppliers must deliver measures which result in cost savings and which improve the ability of a householder to affordably heat their home. HHCRO (also known as ECO Affordable Warmth) focuses on low income and vulnerable householders, living in private housing (generally), where residents are in receipt of specific benefits and meet other related conditions (the affordable warmth group' or AWG')." (p.55, ECO Guidance for Suppliers, Ofgem, 13 March 2013). See [http://www.ofgem.gov.uk/Sustainability/Environment/ECO/guidance/Documents1/Energy%20Companies%20Obligation%20\(ECO\)%20Guidance%20for%20Suppliers%20-%202015%20March.pdf](http://www.ofgem.gov.uk/Sustainability/Environment/ECO/guidance/Documents1/Energy%20Companies%20Obligation%20(ECO)%20Guidance%20for%20Suppliers%20-%202015%20March.pdf)

<sup>7</sup> It was beyond the scope of the evaluation to provide advice to interviewees; however, interviewers were provided with a list of telephone numbers for local advice lines which they could give to the interviewee if more information on subsidised measures was requested.

- If the latter, is your household income under £16,190?

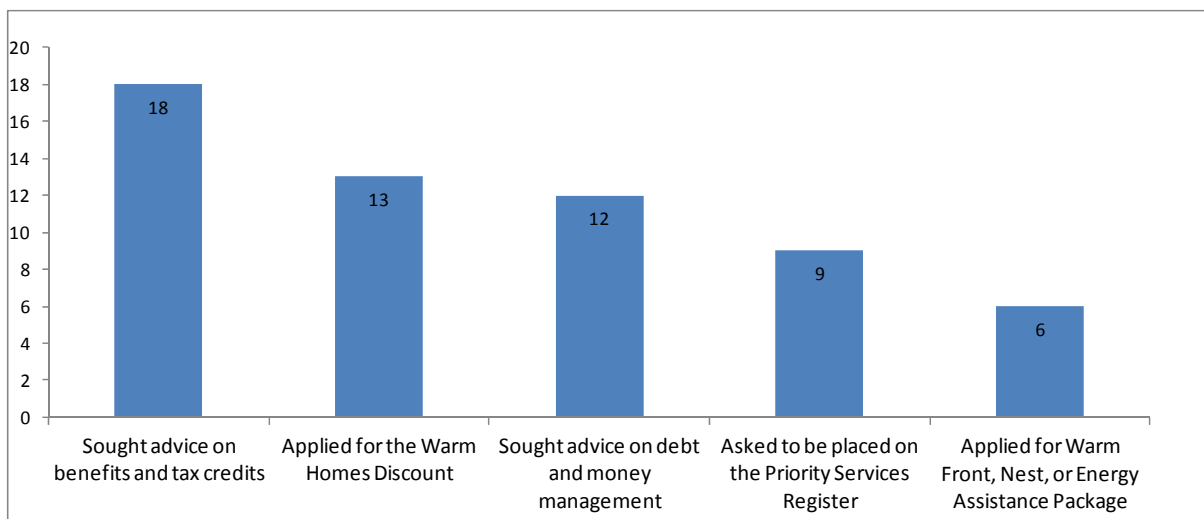
In fact, although the qualifying criteria for HHCRO turned out to be similar to CERT, there was an important difference in that the income threshold for HHCRO is lower, at £15,860. This means that there will be a slight over-estimate in the numbers qualifying for HHCRO; however as not all qualifying benefits were covered there may also be some consumers who would qualify under other criteria.

Although there are other qualifying criteria, there was a need to strike a balance between getting useful information and asking so many questions that interviewees would be reluctant to answer, which is especially a risk when asking about benefits claimed. In addition, these two major criteria were considered to be the ones most likely to be retained in the change from SPG under CERT to HHCRO.

Twenty-four interviewees (16%) receive Pension Credit, while 20 (13%) receive Child Tax Credit and have a household income under £16,190, making a total of 29% of interviewees who meet the above criteria. However, for HHCRO, people living in social housing are not eligible<sup>8</sup>. Applying this further criteria leaves 12 Pension Credit recipients (8% of all interviewees) in private housing with a further two people not reporting their tenure, and seven Child Tax Credit recipients under the income threshold (5% of all interviewees), making a total of 13% of interviewees likely to qualify for HHCRO.

### Further actions

Interviewees were asked about a set of other actions, relating to seeking advice or applying for heating grants, that they had taken since the session. The actions covered and the number taking these actions are shown in Figure 16 below. Thirty-four people (23%) had taken at least one of these actions, with 12 taking two or more actions. The most common action was seeking advice on benefits and tax credits, which was done by 18 people, followed by applying for the Warm Homes Discount, which was done by 13 people.



**Figure 16: Further actions taken by interviewees**

<sup>8</sup> However, the Carbon Saving Communities Obligation, which is another part of the ECO, will be targeted at specific deprived areas, and in these areas social housing will be eligible.

### **Information passed on to friends and family**

Two thirds of consumer interviewees had passed on something that they had learnt at the Energy Best Deal session to friends and family. The median number of people told was two<sup>9</sup> (in an average space of two months between the Energy Best Deal session and the interview).

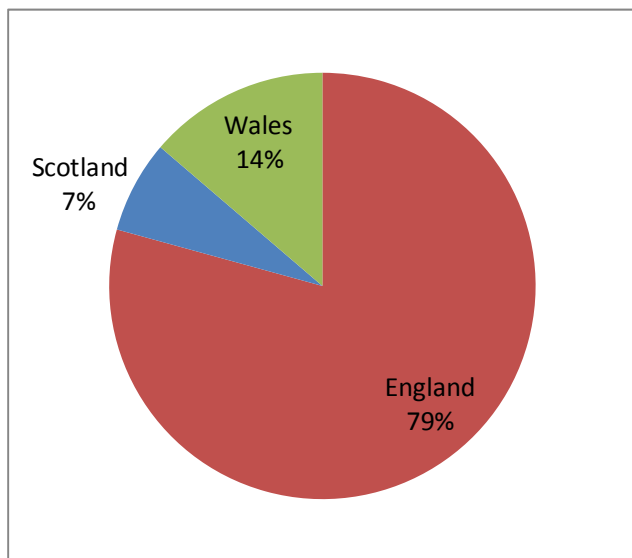
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<sup>9</sup> This takes into account those consumers who did not pass the information on to anyone. If these people are excluded, the median is 6.

# Frontline workers: questionnaire responses

## Profile

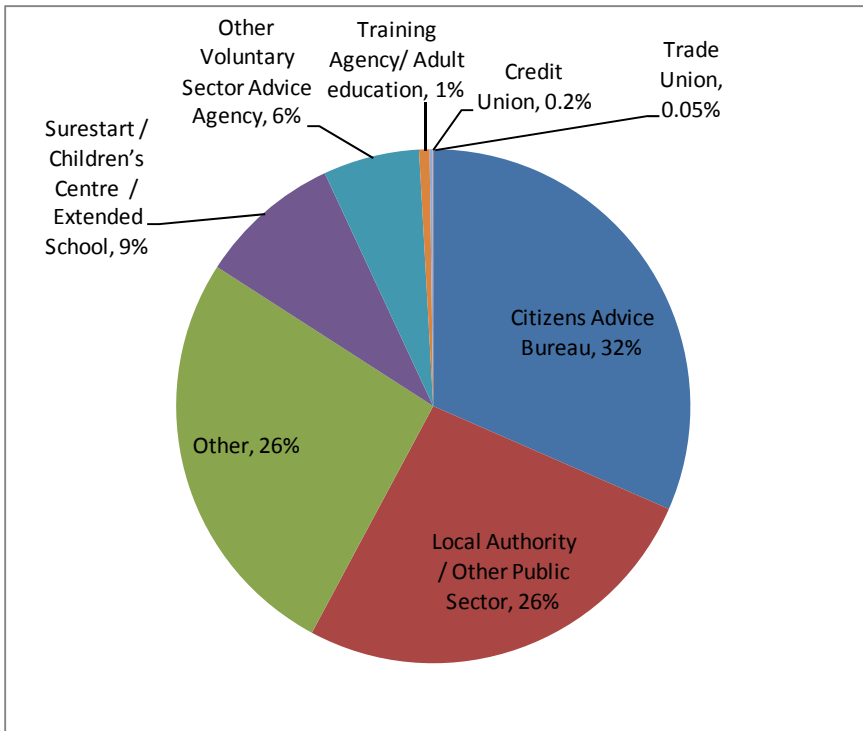
In total, 3,334 frontline workers attended Energy Best Deal sessions. Questionnaires were received from 2,243 frontline workers, equal to 67% of all attendees<sup>10</sup>. Figure 17 shows how this breaks down between countries.



**Figure 17: Frontline worker questionnaire respondents by country**

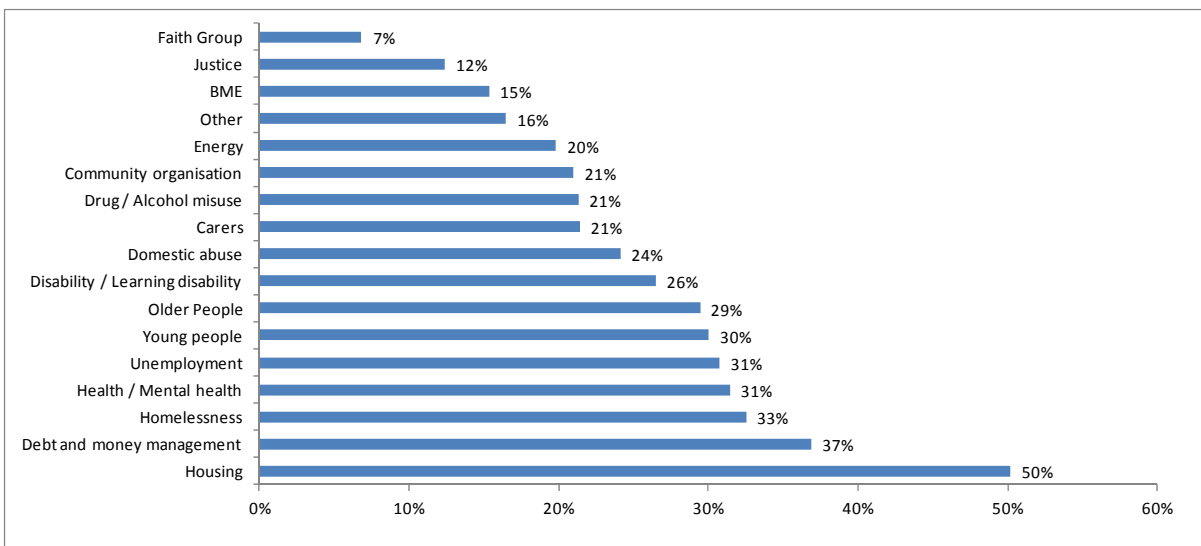
Figure 18 shows the organisations represented by the frontline workers. The largest group was advisors from Citizens Advice Bureaux, with the second largest being local authorities and other public sector organisations. The 'other' category was also large. 'Other organisations' included Age UK, community organisations, housing associations, the Red Cross, the NHS, victim support, and volunteer befrienders. Housing associations were highly represented, with a total of 130 of frontline workers, 4% of the total, working at housing associations.

<sup>10</sup> Not all respondents answered all questions on the questionnaire forms. Throughout this report, the results are shown as percentages of those that answered the specific question.



**Figure 18: Frontline worker organisation types**

Frontline workers were also asked if their organisation specialises in supporting specific groups or advising on specific topics. These are shown in Figure 19, as a percentage of the total number of frontline workers who attended sessions (many people chose more than one option and so the total sums to more than 100%). The topics that frontline workers' organisations most commonly specialise in are housing (50% of frontline workers) and debt and money management (37%).

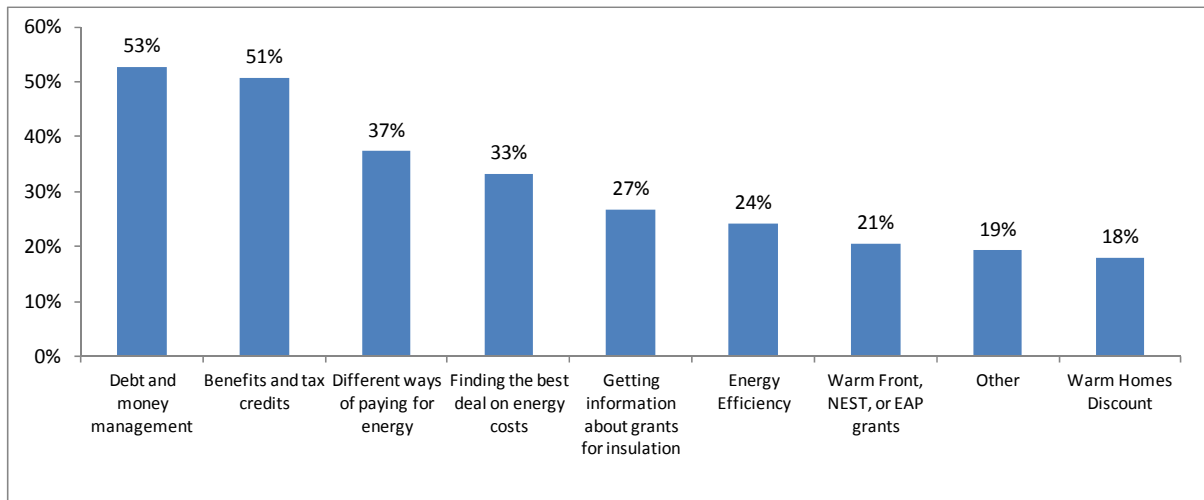


**Figure 19: Frontline worker organisation: specialisms**

### Previous advice-giving

Figure 20 shows the topics which frontline workers had given advice on prior to the session. Just over half had given advice on 'debt and money management' and 'benefits and tax credits', while

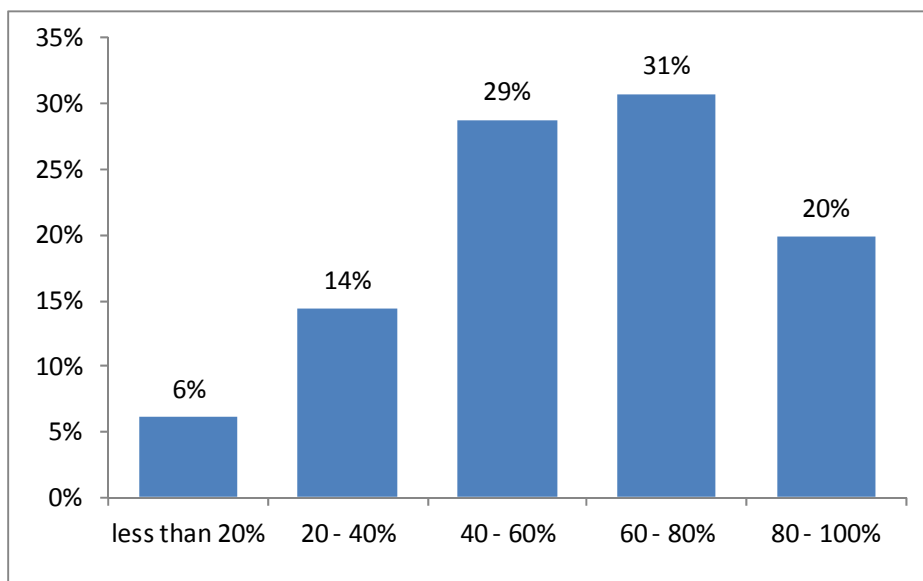
topics specifically related to energy were less commonly advised on. The least commonly advised-on topics were specific schemes such as Warm Front or the Warm Homes discount, although still around a fifth of frontline workers had given advice on these topics. Therefore quite a large proportion of frontline workers had some experience of the topics covered in the Energy Best Deal session.



**Figure 20: Previous advice-giving**

### The impact of the session

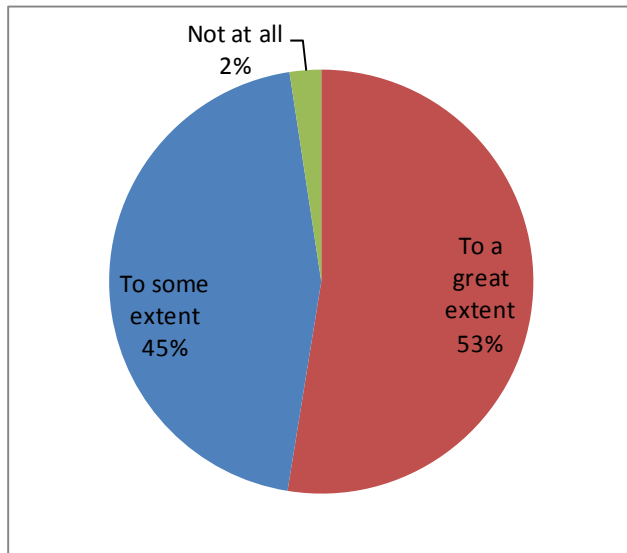
Eighty-three per cent of frontline workers said that the session had changed their opinion on the importance of fuel poverty to their clients. Frontline workers were asked to estimate the proportion of their clients who were in fuel poverty or at risk of fuel poverty. The results are shown in Figure 21. Almost a third estimate that 60-80% of their clients are in, or at risk of, fuel poverty, while 29% estimate this figure to be between 40% and 60%.



**Figure 21: Estimated number of clients in fuel poverty**

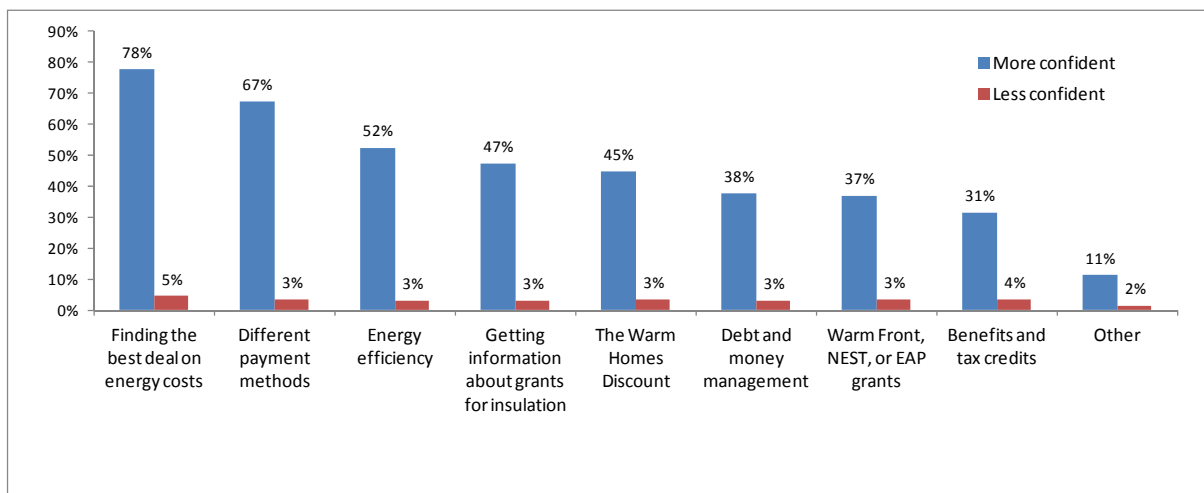


Frontline workers were asked if they felt better informed as a result of the session. Ninety-eight per cent said they did; 53% to a great extent and 45% to some extent. This is illustrated in Figure 22. In addition, 78% of frontline workers said they intended to look for a better deal on their own energy as a result of the session.



**Figure 22: Do you feel better informed as a result of the session?**

Frontline workers were asked if they now felt more or less confident in advising clients about the topics covered in the presentation. The answers are illustrated in Figure 23.



**Figure 23: Increases and decreases in confidence after the session**

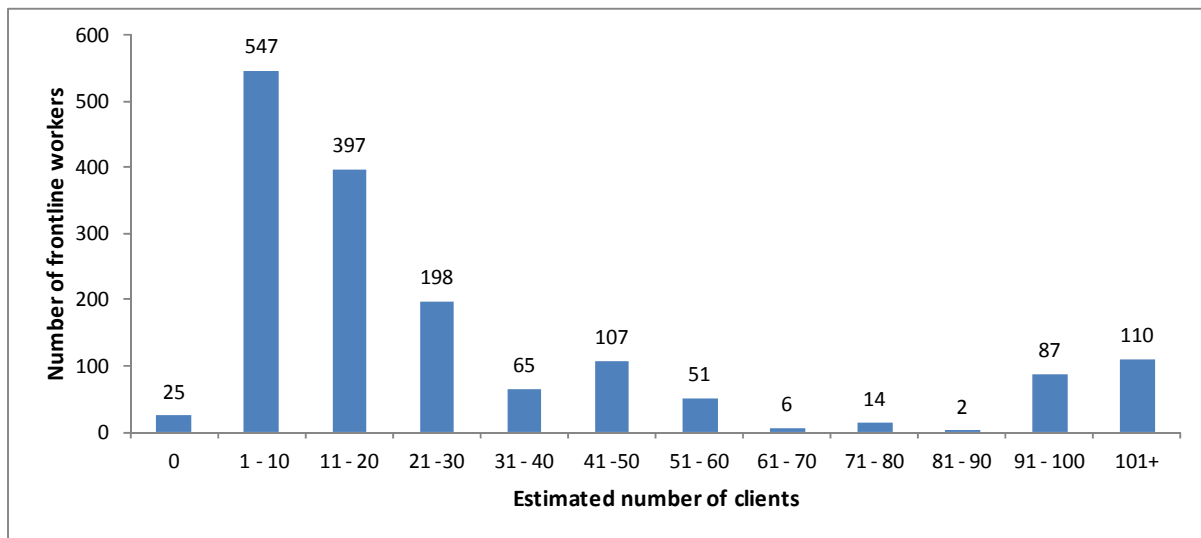
For most topics, a large proportion of frontline workers felt more confident following the session. This was highest for 'Finding the best deal on energy costs', 'Different payment methods' and 'energy efficiency'. For each topic, a small number of frontline workers (up to 4% per topic) felt less confident following the session.

Those who felt less confident were asked why. The main reason given was that they did not feel that giving advice on one of the specific topics was part of their job. Other comments were that they needed more time, information, or detail on all topics, or specific topics, that there is a lack of trust

in energy companies, that the process is too complicated, and a worry that their advice might lead to clients getting a worse deal. Several commented that welfare reform was making the picture more complicated, which explains why 'benefits and tax credits' had the highest number of frontline workers saying they were less confident.

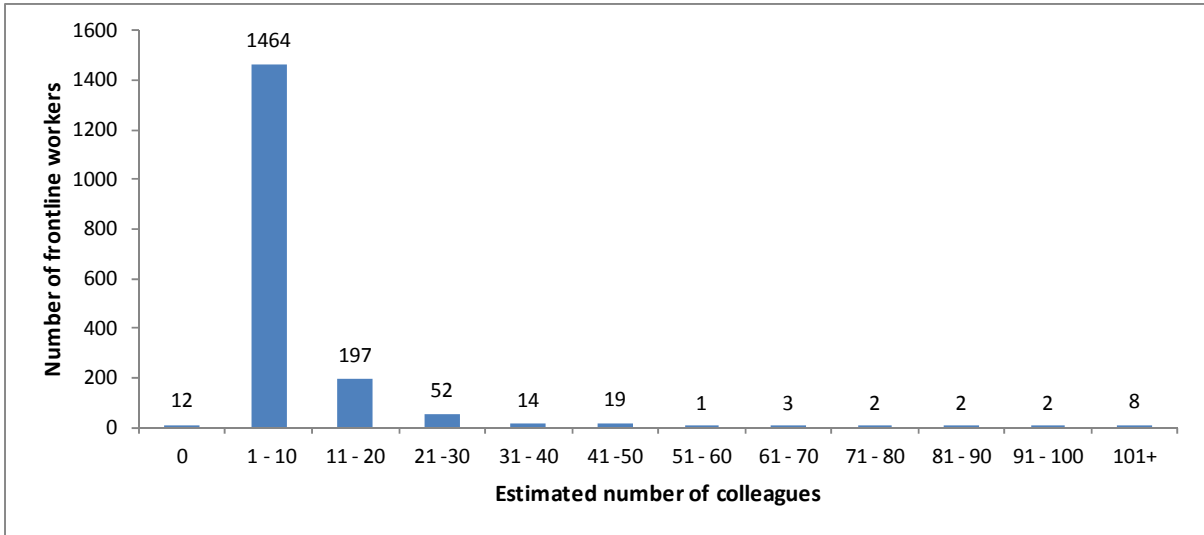
### Passing on information

Frontline workers were asked to estimate the number of *clients* to whom they would pass on information learnt at the session. The distribution is shown in Figure 24. The answers ranged from 1 to 4,200, with a mean of 55 and a median of 20. Due to a few very high values given by some frontline workers, the median is a more accurate representation of the average value in this case. The question was left unanswered by 634 people, 28% of all frontline workers.



**Figure 24: Number of clients information will be passed on to**

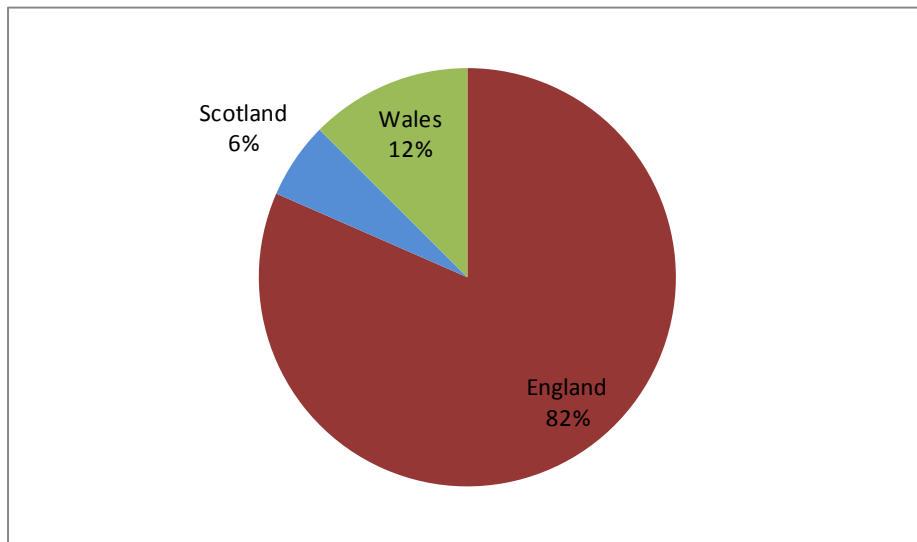
Frontline workers were then asked if they thought they would pass on information from the session to *colleagues*, and if so, approximately how many they would pass information on to. Ninety-six per cent said they would pass on information (67% definitely and 29% probably). The distribution of number of colleagues the information would be passed on to is shown in Figure 25. The answers ranged from 1 to 1,000, with a mean of ten and a median of five. Due to a few very high values given by some frontline workers, the median is a more accurate representation of the average value in this case. The answer given here reflect the number of colleagues each frontline worker would usually work with, with the majority belonging to small organisations or working with a few people within a larger organisation. The larger estimates (the largest number was 1,000) will be where frontline workers can communicate information to many people via a newsletter or other media.



**Figure 25: Number of colleagues information will be passed on to**

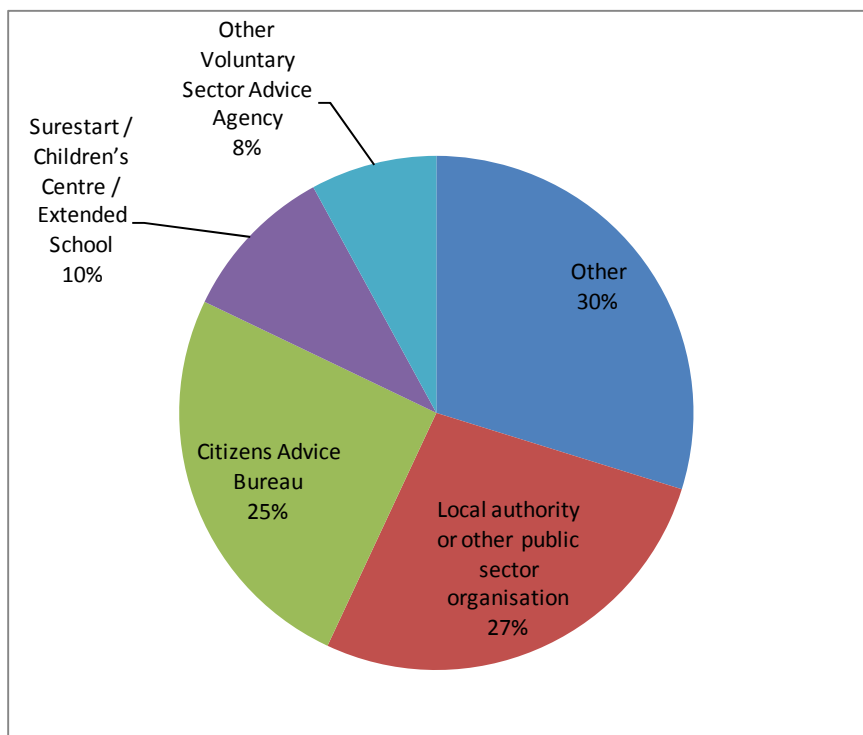
## Frontline workers: follow-up interviews

A total of 152 frontline workers were contacted an average of two months after the session for a follow-up interview. Their distribution between the three countries is shown in Figure 26.



**Figure 26: Frontline worker interviews - country**

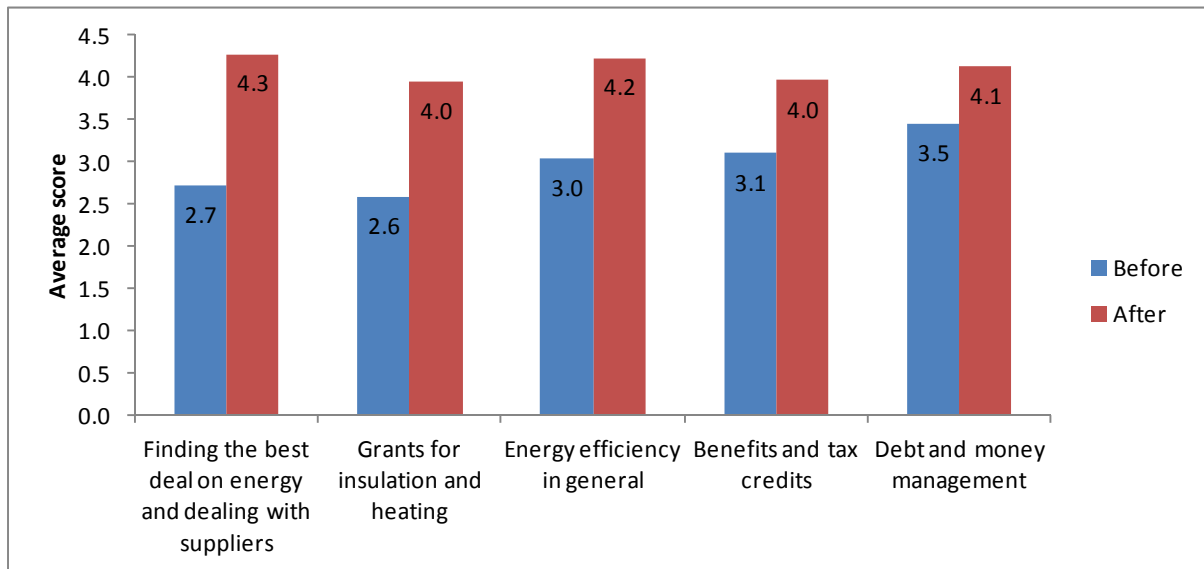
The organisation type of the frontline worker interviewees is shown in Figure 27. 'Other' organisation types were widely ranging, and included Barnardos, a domestic abuse outreach service, housing providers, the Red Cross, a school, a mental health support organisation, and a substance misuse support organisation.



**Figure 27: Frontline worker interviews - organisation type**

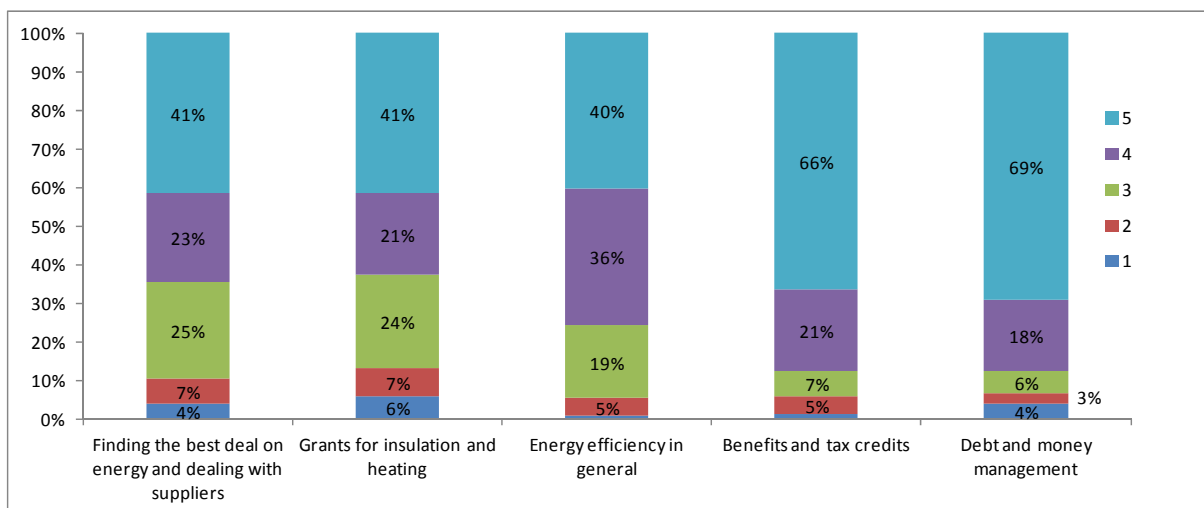
## Advice-giving on Energy Best Deal topics

Frontline worker interviewees were asked to rate each of the five main Energy Best Deal topics in terms of their own level of knowledge before and after the presentation, using a scale of one to five where one is no knowledge and five is highly knowledgeable. Figure 28 shows the average score for levels of knowledge before and after the presentation. The average score increased for all topics, following the session. 'Finding the best deal on energy and dealing with suppliers' had the second lowest score before the presentation, but the highest after the session.



**Figure 28: Levels of knowledge in topics covered in the session: average scores before and after**

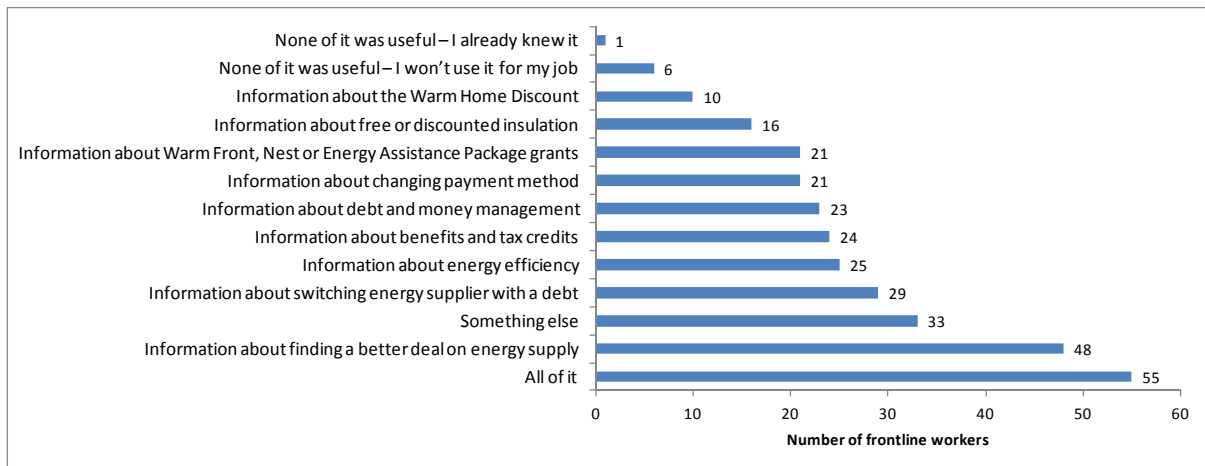
Interviewees were asked to rate the main Energy Best Deal topics in terms of importance to their job role, with 1 being 'not important' and 5 being 'highly important'. The responses are shown in Figure 29. For each topic, 'highly important' was chosen more frequently than any other rating.



**Figure 29: Importance of session topics in terms of interviewees' job roles**

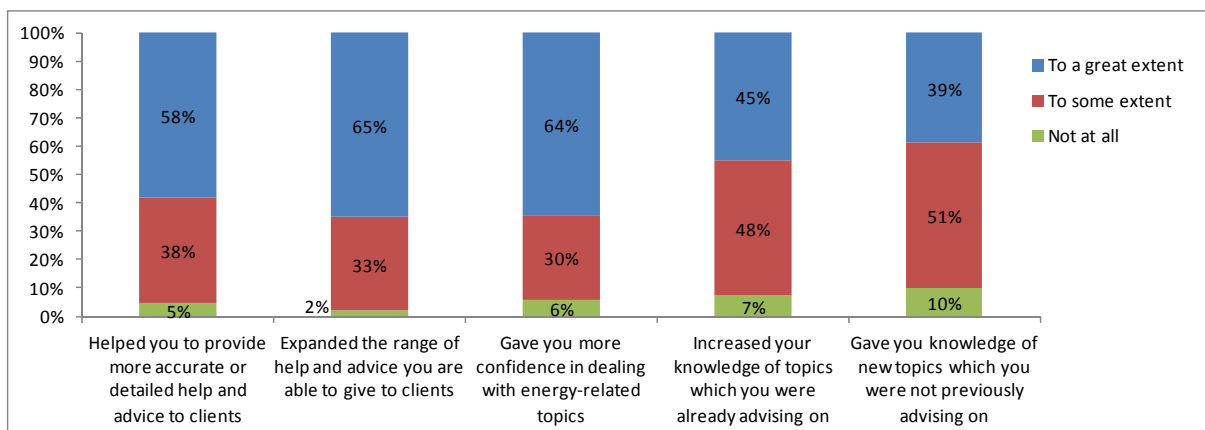
To get more detail on the previous question, interviewees were also asked whether any part of the presentation was particularly useful in helping them do their job. The responses are shown in Figure

30. The 33 people who identified 'something else' that was useful about the presentation mentioned things such as: being given examples, being able to discuss issues, handouts, information about consumer rights, and information about the amount of energy that different appliances use.



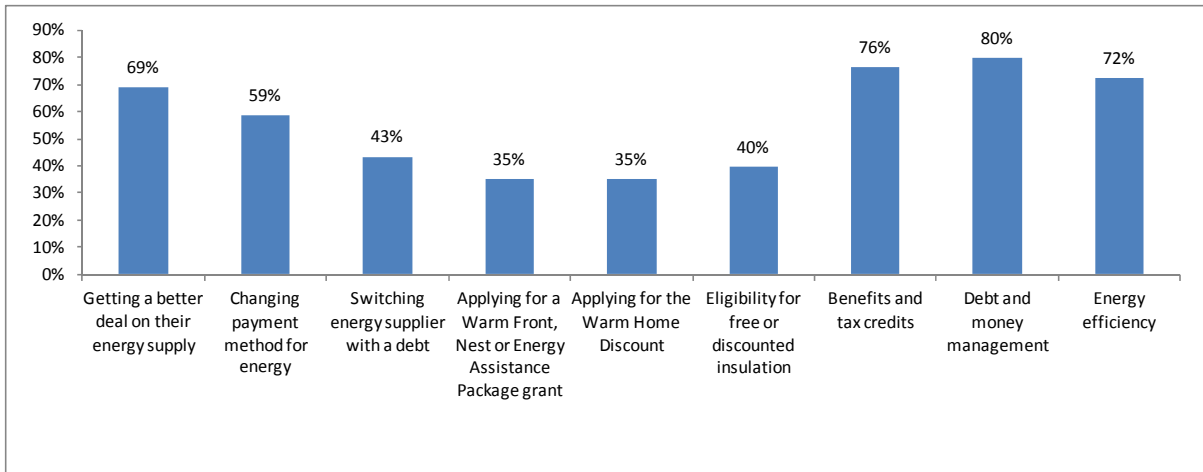
**Figure 30: Did you find any part of the presentation particularly useful in helping you do your job?**

Interviewees were given a set of statements about the effect of the presentation on the advice they were able to give to clients. They were asked to say whether the statements were applicable to them 'to a great extent', 'to some extent', or not at all.



**Figure 31: Effect of session in terms of advice giving**

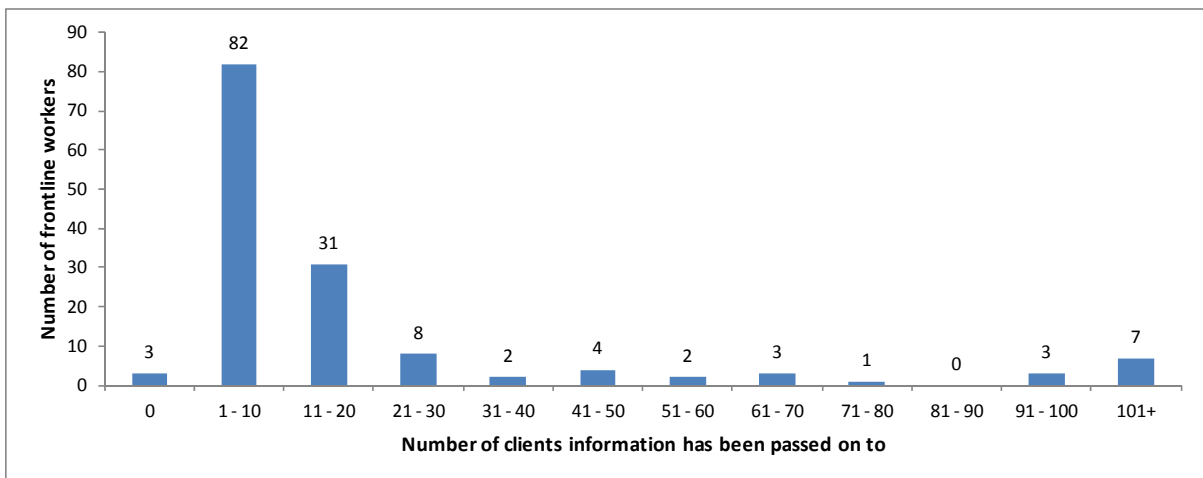
Interviewees were asked which topics they had given advice on since the presentation. The answers are shown in Figure 32.



**Figure 32: Topics advised on since the presentation**

Four-fifths had given advice on debt and money management, with just over three-quarters giving advice on benefits and tax credits and just under three-quarters on energy efficiency.

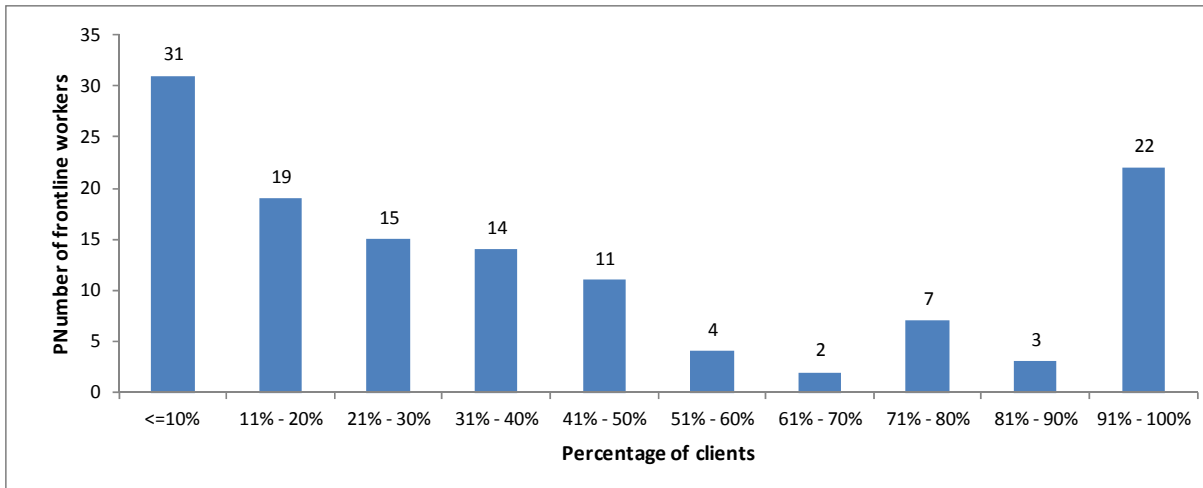
Interviewees were asked to estimate how many clients they had provided information to since the session. The total number across interviewees was 8,701, but this was skewed by some large numbers (the largest being 2,500 and 3,500, reached through newsletters). Nine people had not passed information on to anyone. The median number of clients that information was passed on to was ten people per frontline worker<sup>11</sup>. The distribution is shown in Figure 33.



**Figure 33: Number of clients information has been passed on to since the session**

Frontline workers were also asked what percentage this represented of the total number of clients they had seen in this time. The mean was 38% of clients. The distribution is shown in Figure 34.

<sup>11</sup> Here the median is the same whether or not those that did not pass on information to any clients are included.



**Figure 34: Percentage of clients that information has been passed on to since the session**

Two-thirds (100) of the interviewees said that they would not have provided as much information to as many clients without attending the session, while 38 (25%) said they would have provided the information even if they had not attended the session. However, thirteen of those who said they would have provided the information anyway did say that this would probably have been with less detail, confidence or knowledge if they had not attended the session. Ninety-seven percent of interviewees said that they would use information from the presentation to help clients in the future. Five people saying they felt *less* confident in the topics after the session. Among these five, two people felt that the presentation had made them aware of gaps in their own knowledge, but three people felt less confident due to the presentation of the session; one said that the session had been rushed and did not provide information in enough detail, another said that the presenter was not confident about the energy efficiency aspects of the presentation and that the advice contradicted training she had previously received, and another said that there had been language difficulties in the session.

Frontline workers were asked what the most common energy-related issue was that their clients seek help with. By far the most common answer was that affordability of energy is the main problem. Many also mentioned dealing with debt and problems with inefficient heating systems or badly insulated properties.

Interviewees were also asked if there were any energy-related issues that their clients seek help with which were not covered in the presentation. The responses here covered: two requests for more case study examples of actual situations that people might find themselves in and how to deal with them, dealing with non-gas methods of heating (such as electric storage heaters or oil), and more information on dealing with debt. Two people said that they would have liked more information about benefits changes, but this is currently a very complex topic and signposting to sources of information is more appropriate than trying to cover these comprehensively in the Energy Best Deal session. One person mentioned charges to check a faulty meter. It could be worth including details of if and when a supplier may charge customers to check their meter in the presentation.



### **Passing information on to colleagues**

Ninety frontline workers (59%) said that they had passed some information from the Energy Best Deal session on to their colleagues. The mean number of colleagues the information was passed on to was six, and the median was two (if those who did not pass on information are included). If those who did not pass on information are excluded the mean rises to ten and the median to five. The mean is skewed by one frontline worker who passed on the information to 150 colleagues, and one who passed on the information to 90 colleagues, with all other respondents passing on the information to 30 people or fewer.

In addition, 76% of frontline workers had passed on information from the Energy Best Deal session to friends and family.

### **Frontline workers' own energy use**

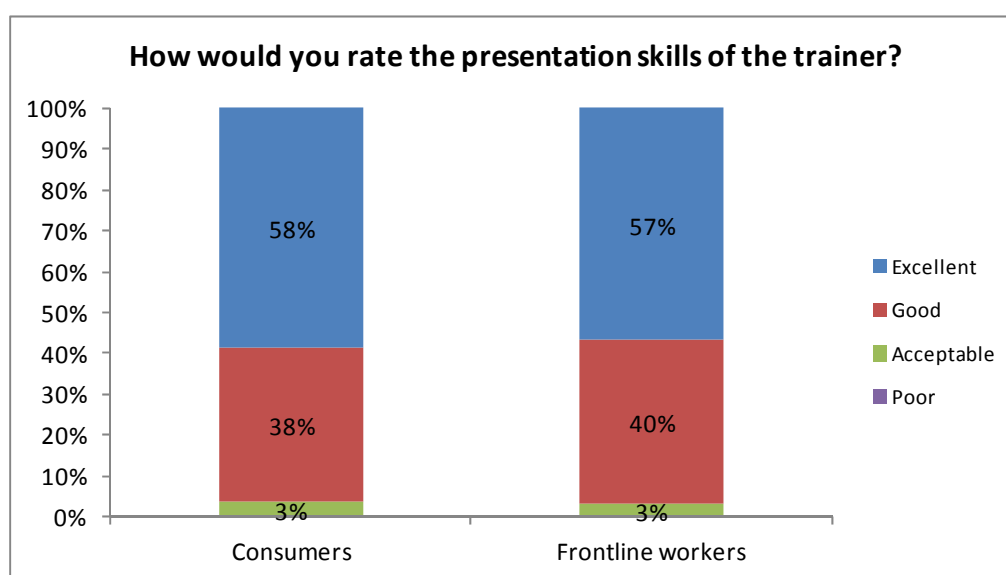
Since the session, 41% of frontline workers had looked for a better deal on their own energy supply. Of these, 37 people (24% of all frontline workers interviewed) had switched either tariff or supplier, or were in the process of doing so. This figure was higher among frontline workers than among consumers (23 consumers, 15% of all those interviewed, had switched or were about to).

Sixty frontline workers had taken steps to save energy in their own homes since the presentation. Most of these were small actions to do with turning off appliances when not in use. A further 16 people said that they had not done anything because they felt they were already very efficient.

## Quality of the presentation and materials

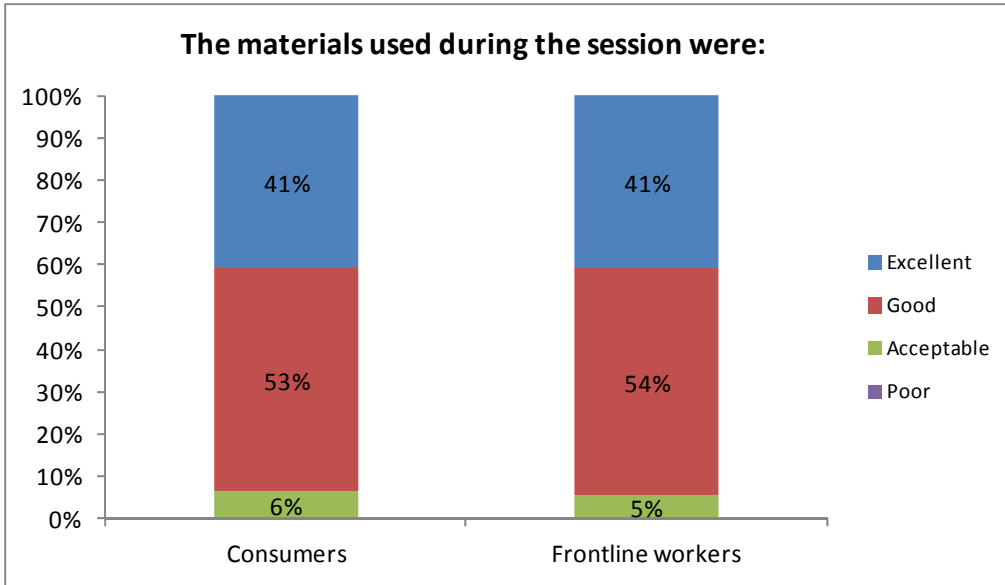
Immediately following the session, participants were asked to rate the presentation skills of the trainer, the quality of the materials used during the session (which consisted of a PowerPoint presentation and any handouts provided by the individual presenters), and the quality of the materials provided to take away. The materials provided to take away were a booklet produced by Citizens Advice and Ofgem, with useful information such as how to deal with problems with suppliers, details of grant schemes, and telephone and website details of further sources of information. Individual trainers also often added their own additional materials. The responses to these three questions are shown in Figure 35 to Figure 37.

Consumers and frontline workers both gave very similar answers. In terms of the presentation skills of the trainer (Figure 35), the majority found these to be excellent, with almost all of the remainder rating them as good. Comments on the presentation skills of the trainer were mostly positive: 'enthusiastic', 'appropriate', 'concise', 'clear', 'easy to understand', 'well prepared', 'good connection with the group', 'encouraged discussion'. The few negative comments tended to relate to difficulties with hearing or seeing the presentation, with one person commenting that the presentation they attended was not well prepared, and another noting that starting the session with an assessment of people's prior knowledge would have been useful. One person noted that the session they attended was not very well advertised (although this is not strictly related to the presentation skills of the trainer).



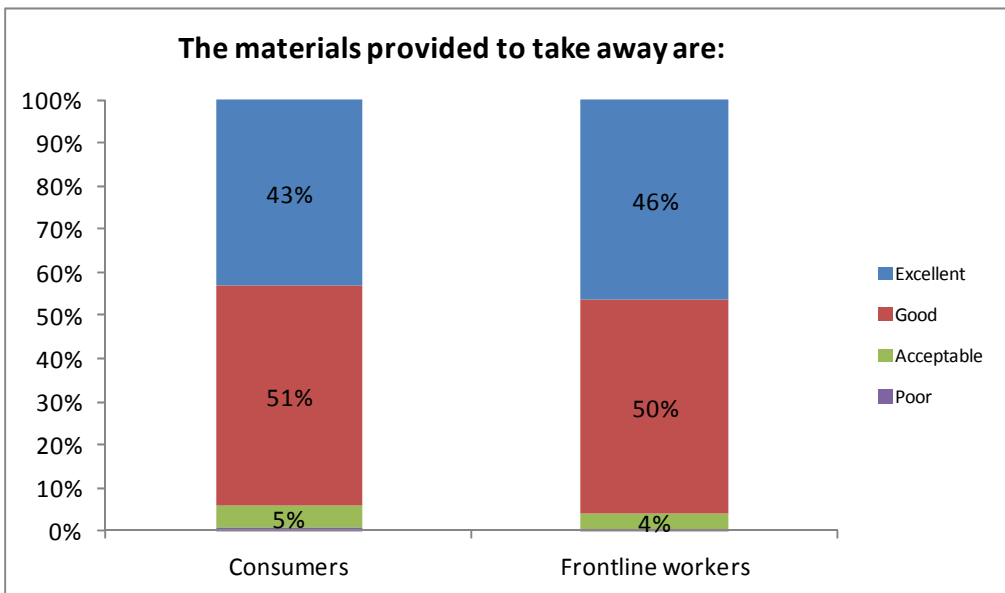
**Figure 35: Ratings of the presentation skills of the trainer**

The majority of attendees rated the materials used during the session (Figure 36) as good, with most others rating them as excellent. Six percent of consumers and five percent of frontline workers rated them as acceptable. Comments indicate that the slightly lower rating for this question, relative to the previous one, was partly due to problems with projectors or internet access during the session.



**Figure 36: Ratings of the quality of the materials used during the session**

The majority of attendees rated the materials provided to take away (Figure 37) as 'good', with most others rating them as 'excellent'. Five percent of consumers and four percent of frontline workers rated them as 'acceptable'. There were many positive comments about the booklet: 'interesting', 'informative', 'accessible'. Comments show that with such a wide audience it is impossible to provide information that suits everyone; some said there was too much detail, and that the booklet was 'too wordy', while others said there was not enough information. There were several requests for large print versions.



**Figure 37: Ratings of the materials provided to take away.**

## 2011/2012 participant interviews – consumers

In order to look at the ongoing impact of the Energy Best Deal session, twenty-five consumers who had attended Energy Best Deal sessions in 2011/2012 were contacted by telephone for an interview. They were randomly selected from the consumers who were interviewed for last year's Energy Best Deal evaluation. The second interviews took place an average of 12 months after the first interview, meaning that these consumers attended an Energy Best Deal session around 15 months ago.

### Looking for a better deal

Of this group of 25 consumers, when they were first interviewed 12 months ago:

- Seven had switched tariff or supplier
- Four had looked into getting a better deal but did not end up switching
- Fourteen had not looked into getting a better deal

A year later, the seven consumers who had switched are all still happy with that decision and have all saved money by switching. One person is saving about £100 per month since switching and another £50-£60. Another found that she was saving 50% until the cold weather arrived and her consumption increased. Three of these seven consumers had since changed tariff (1 person) or supplier (2 people) again, and two more are planning to do so soon.

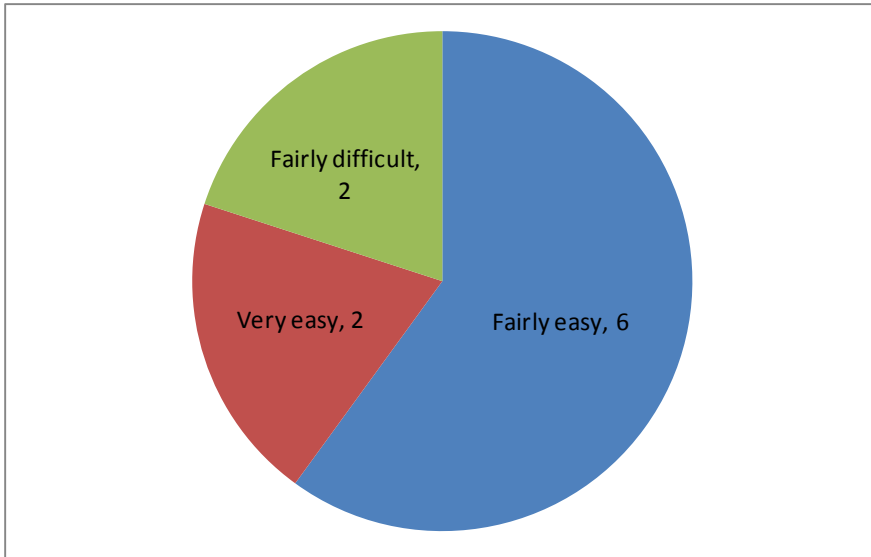
Of the four consumers who a year ago had looked into getting a better deal but did not end up switching, three had since looked again at finding a better deal but none have been successful.

Of the 14 who last year had not looked into getting a better deal, seven consumers had since taken action to get a better deal, and four of these had switched to a new supplier.

Therefore, in total 13 out of 25 interviewees had looked into getting a better deal since they were last interviewed, with seven switching to a new tariff or supplier.

The consumers *who had not switched at the time of the previous interview but who had taken action since then* (10 people) were asked further questions about what they did to find a better deal and how they found the process. Five of them contacted their current supplier to find a better deal, but none were successful. All ten looked into finding out prices offered by other suppliers; eight used switching or price comparison websites to do this, while two asked friends and family, one looked at other energy suppliers' websites, one person contacted other energy suppliers, and one used a price comparison phone service (some used more than one method).

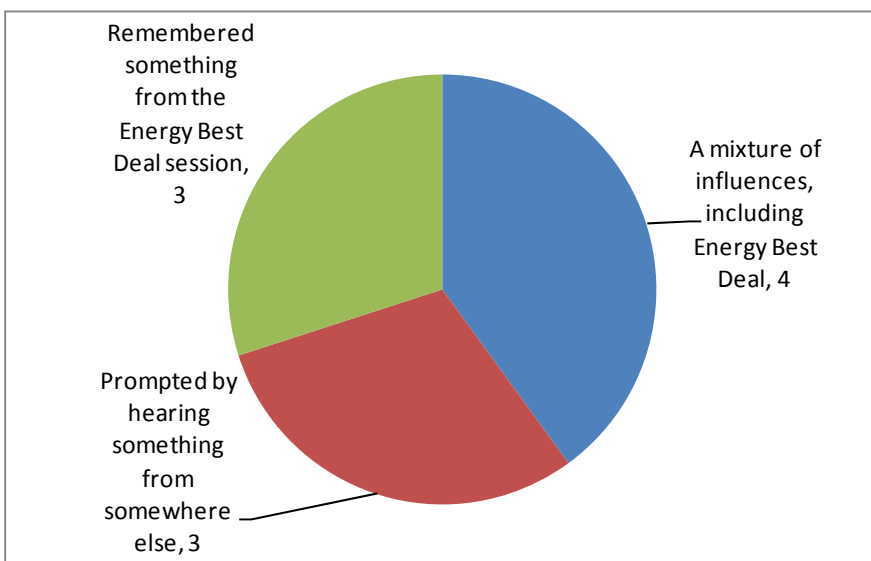
Most of these people found it fairly easy to work out if they would save money by switching because the switching service worked it out for them, however two people found it fairly difficult (Figure 38).



**Figure 38: How easy or difficult was it to work out if you would save money by switching?**

There was no correlation between the source of information and the ease of working out whether it was possible to save money. Those who found it very or fairly easy to work out if they would save money by switching found it easy because the switching service they used worked it out for them (6 people), because an advisor worked it out for them (1 person) or because the energy supplier told them (1 person). Those who found it difficult to work out if they would save money felt this way because of the varying structure of tariffs (1 person) and because they found the information confusing (1 person). Both of these people found they would not save any money if they switched - the marginal differences between the tariffs they were comparing may therefore have contributed to their confusion.

The same ten interviewees were asked what had prompted the new action, and this is shown in Figure 39. For seven out of ten, the Energy Best Deal session was still at least a partial influence a year later.



**Figure 39: Reasons for looking into finding a better deal since the first interview**

## Payment method

Last time we spoke to this group of consumers, three had changed their payment method, and a year later they were still happy with this decision. One told us that she now saved £100 per month, which appears to be a combination of being on a better tariff and a better payment method. All had saved money on their bill following this change.

Of the remaining 22 who had not changed their payment method at the time of their first interview, three had since changed the way they pay for their energy, two to direct debit and another to a prepayment meter in order to pay off his energy debts. The other 19 consumers who had not changed payment method since the session were asked why this was. Ten said they were already using the best payment method (in the majority of cases, this was direct debit), four said that they prefer using a prepayment meter, and the remaining five each gave different answers, which were as follows:

- Have not got round to it
- Prefers to receive a bill rather than using direct debit
- Cannot change due to the terms of a fixed deal
- Distrusts energy companies
- Gave up trying to change after several fruitless phone calls with energy supplier

In the first interview, 15 consumers said they had taken actions to save energy in their home, and eight of these had taken further action since then. Four out of ten consumers who had not taken any other action at the time of the first interview have now done so. These actions include looking into getting benefits, installing insulation, installing double glazing, fixing damp problems, replacing the boiler, being more careful with how much electricity and hot water is used, using draught excluders, and turning the thermostat down.

Other points that these consumers made about Energy Best Deal included:

- Two consumers said that they were now much more aware of saving energy and regularly checked their bills.
- One consumer said she really enjoyed the session and passed on what she learned to other members of her family.
- One consumer said that he found the session very useful and thought that if he had received the advice sooner he would not be in debt.
- Another said the session really brought things home for him and made him focus on how he can save money. He has also been passing what he learnt about saving on to friends and family, particularly information about how to switch.
- Two people said they still use the booklet.
- The session made another consumer more positive about saving energy in her home as the session was very interesting and informative.
- Another consumer said that he had already done most things possible to save energy in his home, but the presentation made him think about it more.
- One consumer said she would have liked to have more information about solar energy in the presentation, or to be signposted to other sources of information.
- Another said that attending the session was his main motivator for switching, which he has since done.

- Two people were less positive: one person said she has not thought about it since the session, while another said he did not learn anything.
- Two people who took action were frustrated. One elderly consumer had never switched her supplier or tariff before looked into switching, but was given widely varying information from different customer service advisors within the same company. Eventually she gave up as it became impossible to work out what the right thing to do. However she noted that friends of hers had had much more positive experiences. Another consumer said she has tried everything and still has high bills.

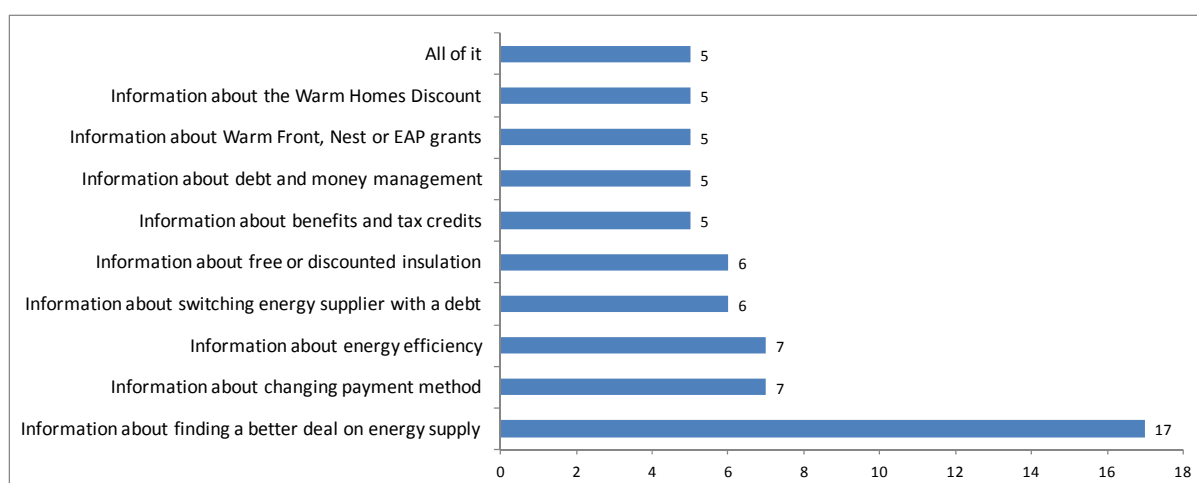
## 2011/2012 participant interviews – frontline workers

Twenty-five frontline workers who attended a session in 2011/2012 were contacted by telephone and interviewed on average 11.5 months later. Twelve of these had been interviewed for the initial evaluation of the 2011/2012 programme, and the remaining thirteen had not previously been interviewed.

Frontline workers were asked what they remembered most clearly from the session. Responses were:

- How to find the best deal
- How to compare tariffs
- How to switch energy supplier
- Understanding bills

When asked if there was anything in particular that they learnt in the session which has been useful since in their work, the majority (17) said ‘information about finding a better deal on energy supply’ (Figure 40). Ten of the thirteen frontline workers not previously interviewed said that the presentation gave them more confidence in dealing with topics that they were already advising on, particularly because it enabled them to help clients with issues that they were not able to advise on previously (e.g. changing supplier or tariff, using paperless bills, and switching with a debt).



**Figure 40: What aspect of Energy Best Deal have frontline workers found most useful in their work**

Of all 25 frontline workers interviewed, 21 said that they still use information from the Energy Best Deal session a year later; six use it less frequently now than they did initially, five more frequently, and ten with around the same frequency as they did initially.

Frontline workers were asked what they have found to be the most common energy-related issue that their clients have needed help with since they attended the session. The issues that came up the most were related to how to deal with the increasing cost of energy, how to find the cheapest tariff and how to switch supplier or to a better tariff. When asked if there were any issues they have had to help clients with that were not covered in the session, issues flagged were energy costs for people who use oil for heating and how to deal with incorrect bills.



When asked if the session could be improved or changed to make it more useful, most frontline workers interviewed said they were very happy with it as it covered most aspects. One person suggested more of a focus on understanding bills. Another person thought that the session was too focused on the process of switching, and that it should focus more on lifestyle issues and practical tips for people without financial resources.

Frontline workers were also asked how many clients they have provided Energy Best Deal information to since the session, and what proportion of all the clients seen in this time that figure represented. Responses to this question ranged from 5% to 100%, which overall amounts to around 1,000 clients provided with information from Energy Best Deal since the session took place. Nearly all frontline workers interviewed said that they are likely to use information from the session in the future (one said probably not, because she was leaving her job).

When asked if they thought they would benefit from a refresher session, 20 out of the 25 frontline workers said yes. One said they had already attended another one and found it very useful. Another said no because the handouts were very useful and she often uses the internet to keep up to date. They were also asked if they thought they would benefit from another session that took some of the subjects from the original session into more detail: 15 frontline workers said yes. In particular, they asked for more information on the following:

- Schemes and grants available for those on benefits
- Debt management
- Energy efficiency
- Finding better deals online and understanding different tariffs

With regards to the point about more information on finding schemes and grants available for clients, it is important to note that this sometimes varies by local area. This could be something for delivery partners to research before delivering sessions: either by drawing together information about current schemes in their area and providing it as a handout, or by signposting frontline workers to different sources of information such as local energy advice centres or a contact within the local authority.

Very few frontline workers who were previously interviewed (two out of twelve) had switched tariff or supplier between the session and the first interview, but since then five had looked at how they might get a better deal and four had switched tariff. Of the frontline workers who had not previously been interviewed, 11 out of 13 said that they looked into finding a better deal following the session. Of the total number of frontline workers who did look into finding a better deal, 11 out of 17 had switched onto that deal, two with the same supplier and nine with a new supplier.

## Case studies

This section provides some brief case studies drawn from the interviews with consumers and frontline workers. They are split into sections according to whether they attended the 2012/2013 sessions or sessions in the previous year.

### 2012 / 2013 attendees

#### Advice passed on to clients and family

An Energy Best Deal participant who volunteers with a carers' network has used the information gained in the EBD session to advise clients on keeping their homes warm and accessing help to do this. A lady she visits through the carers' network has saved money through switching supplier on this participant's advice. The participant also passed on information to her mother, who has been able to claim back a credit from her previous supplier.

#### Fuel bill savings and influence on friends and family

A consumer saved £200 a year as a result of the session, and also passed on information from the session to ten other people, which resulted in six of them receiving funding or saving money. These people included the consumer's daughter, a single mother of three who has achieved a £1,000 reduction in her annual fuel bills.

#### Better payment method and warmer home

One consumer asked his current supplier for a better deal and checked other suppliers' prices online, following the session. As a result of this he found he was already on the best tariff for him, but by switching to direct debit he saved £13 a month. Subsequently he contacted his landlord about insulation within the house. His landlord has now fitted draft excluders and additional insulation, which has reduced the amount of time he needs the heating switched on. He has also advised his mother and grandmother to improve their home insulation and his mother has made her house much warmer as a result.

#### Elderly widow unused to dealing with utilities and bills

A elderly consumer's husband passed away last August. During his illness he had been using an oxygen system which had high energy consumption. When the consumer renewed her contract with her energy supplier the supplier used the previous energy usage to set the direct debit and consequently the consumer's payments are too high. She is struggling with having to deal with utilities and bills for the first time in her life. She felt that the Energy Best Deal session was useful although she did not take in all of the messages from the session; for example she was not confident about asking for the direct debit to be reduced. This is an example of where follow-up one-to-one support from Energy Best Deal Extra would be useful.

#### Further sessions organised

This consumer said that he enjoyed the EBD session and following the session he switched to a new supplier, saving £60 a year. He works at a school and since attending the first session has organised two further sessions at his school. In particular he invited a very vulnerable family to attend who are on a Common Assessment Framework, and who could greatly benefit from this advice.

## **2011 / 2012 attendees**

### **Better tariff found despite current tariff being preferential**

One consumer did not initially look for a better deal because he thought he would not save enough money to make it worthwhile. He is disabled and due to this he was already on a discounted tariff. Prompted by the Energy Best Deal session, although some time after the session, he decided to look into finding a better deal. He called his existing supplier but they were not able to offer him a better tariff than the one he already had. He then looked at a switching / price comparison website and found it fairly easy to work out from there if he could save money, and subsequently found the whole process of switching to a new supplier very easy. Since the interview last year he has also used draught excluders on his doors, and has had cavity wall insulation and a new boiler installed in his privately rented property. All of this has made a noticeable difference to his energy use and bills.

### **Saving on prepayment meter but harassed by former energy supplier**

This consumer, when first interviewed, had not done anything to look into finding a better deal. Since then she has used price comparison websites and other energy suppliers' websites to find a better deal, prompted by information she remembered from the session. She stayed on a prepayment meter but saved approximately £250 a year as she no longer has to pay a fee for the meter. Unfortunately she found the process of switching very difficult as the former energy supplier did not acknowledge a payment she had made and called her monthly asking her to switch back.

### **Improvement in debt management**

One consumer initially paid for his gas and electricity upon receipt of the bill, but he has found himself with significant debt. His fuel bills were impossible to manage and he was not able to heat his home to a comfortable level in the winter. When he was initially interviewed he had not looked at finding a better energy deal because of the debt. He told us in the first interview that he had sought advice on debt and money management as well as energy efficiency and benefits since the session, and was keen to switch as soon as possible. In the second interview he said that he had changed to a prepayment meter following advice in the session and had found it an excellent way to pay off his arrears and manage his budget much more efficiently. He is now more knowledgeable about debt and knows where he can go for advice; he said that if he had been given the advice earlier he may not have been in so much debt, and so he said the session had been very beneficial to him.

## Energy Best Deal Extra

As the current Energy Best Deal programme got underway, Citizens Advice obtained funding for a number of Bureaux to provide one-to-one follow-up advice appointments, called 'Energy Best Deal Extra'. These were offered to attendees of Energy Best Deal sessions, as well as via other channels such as referral by a case worker or attendance at a Financial Capability session.

Energy Best Deal Extra ran from January 2013 to April 2013. The evaluation of the main Energy Best Deal programme was expanded to cover Energy Best Deal Extra, focusing on those people who had come to Energy Best Deal Extra via an Energy Best Deal group session rather than other channels.

Forty-three<sup>12</sup> of these people were contacted and asked a set of questions about their experience of the one-to-one advice appointment and whether it had benefitted them.

Four people who were interviewed had requested EBDx advice appointments but they had not been contacted with an offer of an appointment. Bureaux records show that in the case of one client, the bureau tried to contact the client and was not able to. A further person appears on reports as having attended an Energy Best Deal session and having booked an EBDx appointment; however when contacted for interview he said he was not aware of Energy Best Deal Extra.

A further four people missed appointments for various reasons. One was not offered another appointment, one planned to book another appointment, one person did not want to have an appointment any more, and the other person was not sure whether they would re-book. In addition, one person we contacted had an appointment booked for a future date.

This left 33 people who had attended an Energy Best Deal Extra advice appointment. Of these, 30 people said they found the advice appointment useful, while three said that they did not. Two of these people were husband and wife who had attended an advice appointment together. They both said that they did not find the advice appointment useful, but this is rather surprising as they were referred to a grant scheme which would replace some household appliances for them. They had been waiting a long time for a response from the scheme and had still not heard anything, so it appears that the response that they did not find the advice appointment useful was due to the lack of responsiveness of the scheme they had been referred to, rather than the Energy Best Deal Extra advice appointment itself.

The third person who did not find it useful was interested in finding out about insulation and boiler upgrades, and was told that as he was a homeowner there was no help available. It may be that this advice was correct at the time and for the area where he lives, because the transition between CERT and ECO / Green Deal has left something of a gap, but it would have been more useful if he had been signposted to further sources of help and told to look into it again in a few months when new schemes might be available.

The rest of this section describes the experience of the 30 interviewees who found the Energy Best Deal Extra advice appointment useful.

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<sup>12</sup> The target number of interviews was 40

In most advice appointments, advice given to the client included help with switching tariff, supplier, or payment method. Twenty-two interviewees said this had been covered in the advice appointment they attended. The support given ranged from simply talking about these subjects to checking the client's own bills and actually doing the tariff switch. Three people had already switched tariff or supplier as a result of the advice appointment (one of these was switched during the advice appointment). One of these people said that the switch had resulted in a significant saving. A further eight people were planning to switch or considering it. Three people said the advice appointment helped them to confirm that they were already on the best tariff.

The Warm Homes Discount (WHD) and the Priority Services Register (PSR) were also topics which were commonly covered. Twelve people said that these topics had been covered in their advice appointment.

There was variability as to how far the client had progressed after the advice appointment. This may have been due to variability in the amount of time that had passed between the advice appointment and the interview. Some people were still considering applying for WHD or PSR, while others had already applied. One person mentioned that in their advice appointment WHD and switching were discussed, but that they would need more support to be able to follow them up. Another person said that in her first advice appointment the advisor phoned her supplier to do a switch, but the supplier required a meter reading. She will take the meter reading to a follow-up advice appointment so that the switch can be completed.

Eleven people were given advice on energy efficiency in their advice appointment. One client said they had definitely cut their energy usage since the advice appointment, while another person said they had taken some of the energy saving actions that they were advised on. One client said they felt they were better able to budget now that they have more options for saving energy.

Several people were helped to change their meters. One client was advised to change her meter from Economy 7 to standard as she was no longer using the Economy 7 (it is not clear what heating she was using instead). She was very pleased as the switch happened within a day of her EBDx appointment and as a result she is saving £30 a month. Another client was advised to change from a prepayment meter to a credit meter, which she did, and she is happier with this as it has opened up more possibilities for switching to a better tariff. A third client also said she had been advised to switch from a prepayment meter to a credit meter and she is going ahead with this. She will then check tariffs for the credit meter. A fourth client had a problem with a large bill caused by a faulty meter: the advisor contacted the energy supplier to resolve the erroneous bill, and organised for the meter to be replaced, which has now been done.

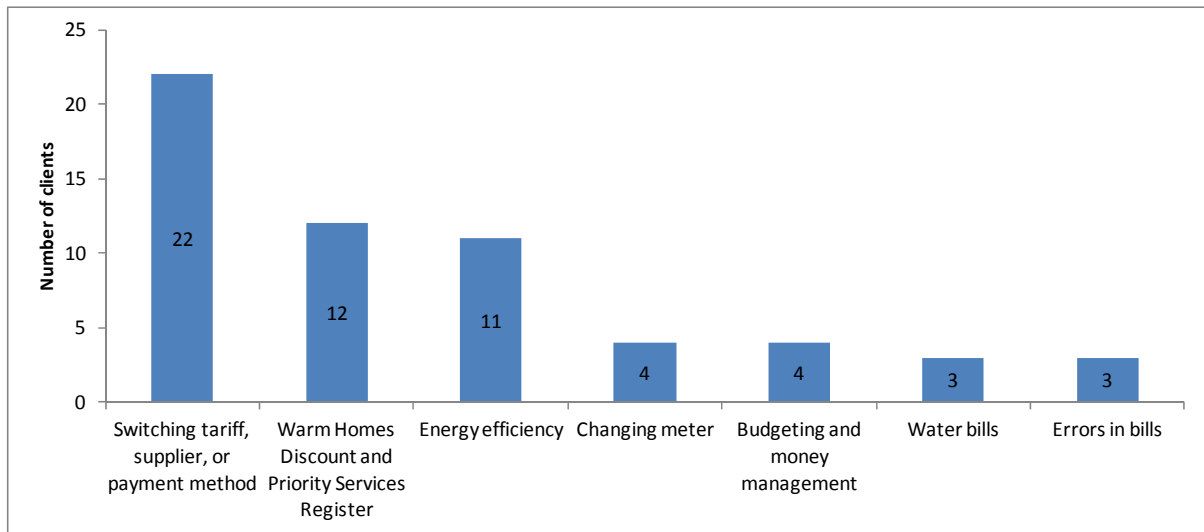
One client said that because she is on an Economy 10 tariff, switching tariff is not an option for her. There are only a very limited number of Economy 10 tariffs, and so a better tariff may not have been available, but in this case the advisor did not appear to flag up the possibility of changing her meter so that she could use Economy 7, which has a greater choice of tariffs.

Three people received advice about water bills. One client had a water meter fitted as a result of the advice appointment, while following the advice appointment another client had contacted their water company about reducing bills (either through an assessed charge or through installing a meter).

Three clients were helped to resolve errors in their bills. Four people were helped with budgeting and money management generally, including one person who was struggling to organise all of her bills and felt that the advice appointment had given her a "fresh start" with her finances.

One client was a frontline worker, who found the advice appointment very informative. One person received advice on extra benefits to help with housing costs. Another specifically mentioned that the WHD would help him with his housing costs.

Figure 41 shows the number of clients who were helped with different topics. Several clients received help with more than one topic.



**Figure 41: Help received in the Energy Best Deal Extra advice appointment**

Therefore clients received many tangible benefits from the Energy Best Deal Extra advice appointments. The great majority of those who attended advice appointments found them useful and in most cases were given significant practical help.

# Summary and conclusions

## Consumers: 2012/2013 sessions

A large proportion of questionnaire respondents were having difficulties with heating and bills: 42% percent of respondents said they were not able to heat their home to a comfortable level, while 20% said they found their winter bills a financial strain.

Ninety-eight percent of those who answered said they found the session useful (this question was left unanswered by 246 people, equal to 7% of respondents), and 77% of people said they would definitely or probably do something as a result of the session. Contacting the current energy supplier was the most popular planned action (46% of respondents).

One hundred and fifty questionnaire respondents were selected at random to take part in a follow-up interview, an average of two months after attending a session. They were asked about a range of different actions that they might have taken since the session. Across all actions covered in the interview, a total of 103 people (69%) had taken at least one. Even where consumers had not taken action (47 people), more than half (25) had told family and friends about something they had learnt at the session.

Forty-eight people (32% of all interviewees) had looked for a better energy tariff since the session.

Thirty three of the 48 people who checked prices found a better deal (69%), and 70% of those who were offered a better deal switched to it. Twelve of these people had an idea of how much they would save from switching. The largest amount saved was £100 per month while the smallest was £50 per year. On average the expected saving was just under £260 per year.

Contacting a different supplier was more likely to reveal a better deal than looking at the prices of the current supplier (18 out of 32 people who checked prices from other suppliers were offered a better deal, as opposed to 21 out of 43 who contacted their own supplier being offered a better deal).

Seventy-eight people (52%) said that they had done something to save energy in their home since the session, although ten of these said their action had not been a direct result of the Energy Best Deal session. Since the session, a total of twelve people started looking into installing, or have installed, larger scale measures. This is 8% of all interviewees.

Two thirds of consumer interviewees had passed on something that they had learnt at the Energy Best Deal session to friends and family. The median number of people told was two<sup>13</sup> (in an average space of two months between the Energy Best Deal session and the interview).

## Frontline workers: 2012/2013 sessions

Ninety-eight per cent of frontline workers said they felt better informed as a result of the session; 53% to a great extent and 45% to some extent.

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<sup>13</sup> This takes into account those consumers who did not pass the information on to anyone. If these people are excluded, the median is 6.

Eighty-three per cent of frontline workers said that the session had changed their opinion on the importance of fuel poverty to their clients. Almost a third estimate that 60-80% of their clients are in, or at risk of, fuel poverty, while 29% estimate this figure to be between 40% and 60%.

The vast majority of frontline workers (at least 88% of those that responded to each question) felt more confident about the topics covered, immediately following the session. The topics with the highest increase in confidence were those related to energy, such as switching payment method, finding the best deal, or energy efficiency.

A total of 152 frontline workers were contacted an average of two months after the session for a follow-up interview. In the interview, they were asked to rate (from 1 to 5) each of the five main Energy Best Deal topics in terms of their own level of knowledge before and after the presentation. The average score for 'Finding the best deal on energy and dealing with suppliers' increased from 2.7 before the presentation to 4.3 after the presentation.

Since the session, 69% of interviewees had given clients advice on getting a better deal on their energy supply. The median number of clients that information on *all* of the main Energy Best Deal topics (not just getting a better deal on energy supply) was passed on to since the session was ten people per frontline worker<sup>14</sup>. Two-thirds (100) of the interviewees said that they would not have provided as much information on these topics to as many clients without attending the session.

The median number of colleagues frontline workers had passed information on to since the session was two.

### **Quality of the presentation and materials: 2011/2012 sessions**

Fifty-eight percent of consumers and 57% of frontline workers rated the presentation skills of the trainer as excellent. Forty-one percent of consumers and 41% of frontline workers rated the materials used during the session as excellent, with most of the remainder rating them as good. Forty-three of consumers and 46% of frontline workers rated the materials provided to take away as excellent, with most of the remainder rating them as good.

### **Consumers: 2011/2012 sessions**

In order to look at the ongoing impact of the Energy Best Deal session, twenty-five consumers who had attended Energy Best Deal sessions in 2011/2012 were randomly selected and contacted by telephone for an interview. These second interviews took place an average of 12 months after the first interview, meaning that these consumers attended an Energy Best Deal session around 15 months ago.

Of this group of 25 consumers, when they were first interviewed 12 months ago:

- Seven had switched tariff or supplier
- Four had looked into getting a better deal but did not end up switching
- Twelve had not looked into getting a better deal

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<sup>14</sup> Here the median is the same whether or not those that did not pass on information to any clients are included.



A year later, the seven consumers who had switched are all still happy with that decision and have all saved money by switching. Three of these seven consumers had since changed tariff again, and two more are planning to do it soon.

Of the 12 who last year had not looked into getting a better deal, seven consumers had since taken action to get a better deal.

In total, ten out of 25 interviewees had looked into getting a better deal since they were last interviewed. They were asked what had prompted this new action, For seven out of ten, the Energy Best Deal session was still at least a partial influence a year later.

In the first interview, 15 consumers said they had taken actions to save energy in their home, and eight of these had taken further action since then. Four out of ten consumers who had not taken any other action at the time of the first interview have now done so.

### **Frontline workers: 2011/2012 sessions**

Twenty-five frontline workers who attended a session in 2011/2012 were contacted by telephone and interviewed on average 11.5 months later. Twelve of these had been interviewed for the initial evaluation of the 2011/2012 programme, and the remaining thirteen had not previously been interviewed.

Of all 25 frontline workers interviewed, 21 said that they still use information from the Energy Best Deal session a year later; six use it less frequently now than they did initially, five more frequently, and ten with around the same frequency as they did initially.

Frontline workers were asked what they remembered most clearly from the session. Responses were:

- How to find the best deal
- How to compare tariffs
- How to switch energy supplier
- Understanding bills

When asked if there was anything in particular that they learnt in the session which has been useful since in their work, the majority (17) said 'information about finding a better deal on energy supply'.

### **Energy Best Deal Extra**

People who attended Energy Best Deal Extra advice appointments were given advice about or directly helped with the following: switching supplier, saving energy, Warm Homes Discount, Priority Services Register, resolving disputed bills, changing their meter, and saving money on water bills. Thirty out of thirty-three people who attended an advice appointment and who were interviewed said they found it beneficial.

### **Conclusions**

Many positive outcomes can be seen from the Energy Best Deal sessions, both in terms of switching and other follow-up actions, for consumers, and use of information to help clients, in the case of frontline workers.

An interesting point to come out of the evaluation this year was that several people commented that the information from the Energy Best Deal sessions could go out of date quickly. For the 2012-2013 programme, a number of factors have come together to create this situation: welfare reform, the change from CERT to ECO, and government plans to simplify tariffs. The benefit from Energy Best Deal running every year is that it is possible to provide updated information, although of course the same people do not attend each year. It is also worth considering whether there is more scope within the sessions to provide attendees with the skills and tools they need to find the most up to date information themselves, in the form of more signposting to sources of information along with more context about the energy market. Given the very wide range of people who attend Energy Best Deal sessions, this may not be practical. The degree of independence and confidence among consumers who attend Energy Best Deal sessions varies widely, while frontline workers come from a range of disciplines and have varying responsibilities. This is a constant challenge for Energy Best Deal.

The majority of frontline workers experienced an increase in confidence on at least one Energy Best Deal topic following the session. Most said some part of it was useful in helping them to do their job, and the 152 frontline workers who were interviewed had used information from the Energy Best Deal session to help a median of ten clients in the average of two months since the session; 100 of these (66%) said they would not have provided as much information to as many clients if they had not attended the session. Interviews with small sample of frontline workers who attended a session in the previous year showed evidence that they were still using information from the Energy Best Deal session to help clients over a year later. This shows the ongoing impact of the sessions.