



Energy Best Deal

Evaluation Report, 2013/2014

July 2014

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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 2013 and April 2014, 1,297 sessions were delivered by 179 delivery partners across the 14 regions of the Citizens Advice Financial Capability Forums¹ in England and Wales, and 187 sessions were delivered by 18 Citizens Advice Bureaux in Scotland. In total during 2013/2014, the programme reached 10,349 consumers and 5,408 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 2013/2014 programme. The evaluation was carried out using paper questionnaires completed immediately following the session, and follow-up telephone interviews carried out an average of three months after the session. A total of 9,423 questionnaires and 150 telephone interviews were completed. The ongoing effect of the 2012/2013 programme was also investigated, using a smaller sample of 50 interviews with people who attended Energy Best Deal sessions in 2012/2013.

Impact of the 2013/2014 programme – consumers

- In total, 10,349 consumers attended the Energy Best Deal sessions, and questionnaire responses were received from 6,086 consumers, 59% of all consumers who attended sessions. Of the consumer questionnaire respondents, 80% attended sessions in England, 10% in Scotland, and 10% in Wales.
- Almost all (97%) consumers who responded said they found the session useful.
- Seventy-five 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 35% had looked for a better deal on their energy bills since the session (an average of three 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, 75% of consumer interviewees had taken some kind of action following the session.
- Just over half of the 35% of consumers who looked for a better deal found one. This is equal to 19% of all consumers interviewed².

¹ 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.

² One consumer who found a better deal did not switch and so the total proportion of interviewees switching was 18%.

- Forty-eight percent of consumer interviewees had taken some kind of action to save energy in their home, as a result of the session.
- Since the session, 20 people (13%) had applied for the Warm Home Discount.

Impact of the 2013/2014 programme - frontline workers

- In total, 5,408 frontline workers attended Energy Best Deal sessions, and questionnaire responses were received from 3,337 frontline workers, 62% of all those who attended sessions.
- Of the frontline worker questionnaire respondents, 78% attended sessions in England, 11% in Scotland, and 11% in Wales.
- Ninety-seven percent of frontline workers said they felt better informed following the session: 52% to a great extent and 45% to some extent.
- Eighty-one percent of frontline workers said the session had changed their opinion on the importance of fuel poverty for the people they work with.
- Thirty-two 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, 93% of frontline workers said they felt more confident advising on at least one of the topics covered in the presentation, while only 6% felt less confident in at least one topic.
- Of the 150 frontline workers who were interviewed three months after the session, 71% had given advice on getting a better deal on energy supply, and 69% had advised on energy efficiency.
- Where frontline workers had given advice on Energy Best Deal topics following the session, 61% said they would not have been able to provide as much information to clients if they had not attended the session.
- On average, frontline workers interviewed rated their level of knowledge across all topics covered in the presentation as higher after the presentation than before the presentation, with the largest increase being in 'grants for insulation and heating'.
- In an average of three months since the session, frontline workers had passed on information from the session to a median of thirteen clients. On average this represented around 50% of the clients they had seen in this time.

Ongoing impact of the 2012/2013 programme

- Follow-up telephone interviews were conducted with 25 consumers and 25 frontline workers who attended Energy Best Deal sessions in the previous campaign, 2012/2013.
- There was evidence that the session had had an ongoing impact for some of the consumers in terms of making them aware of energy consumption and making the idea of switching less scary.
- The majority of frontline workers interviewed said they had learnt something at the session which had been useful to them in their work since then.

Energy Best Deal Extra

- Ninety-nine Citizens Advice Bureaux were involved in delivering one-to-one 'Energy Best Deal Extra' advice appointments to a total of 4,318 clients.

- Fifty-two people who attended an Energy Best Deal Extra advice appointment were interviewed by telephone following the appointment.
- Forty-eight people (92%) who were interviewed said that they found the advice appointments helpful.
- Twelve people interviewed switched supplier or tariff as a result of the advice appointment and two people switched from prepayment meters to credit meters. Six people had applied for and received the Warm Home Discount.
- Those who were interviewed were given advice about or directly helped with the following at their Energy Best Deal Extra advice appointment : switching supplier (27 people), benefits (13), energy efficiency (12), Warm Home Discount (10), debt (7), changing meter (2), water bills (2), finances (1), job search (1).

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 2013/2014, Citizens Advice secured record funding of £605.5k from British Gas; EDF Energy; First Utility; ScottishPower; and SSE . This compares with funding of £400k in 2012/13.

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, and in 2011/2012 and 2012/13 was delivered by Citizens Advice Scotland to both frontline workers and consumers.

Between October 2013 and April 2014, 1,297 sessions were delivered by 179 delivery partners across the 14 regions of the Citizens Advice Financial Capability Forums³ in England and Wales, and 187 sessions were delivered by 18 Citizens Advice Bureaux in Scotland. In total during 2013/2014, the programme reached 10,349 consumers and 5,408 frontline workers.

In 2013, Citizens Advice obtained funding for 99 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 through other channels such as referral by a case worker or attendance at a financial capability session. This ran from January 2013 to April 2013. Citizens Advice obtained funding to repeat the Energy Best Deal Extra programme in winter 2013-2014. This ran from October 2013 to April 2014, with a total of 4,318 advice appointments delivered by 89 Bureaux in England and Wales and 10 Bureaux in Scotland.

Methods

A survey of consumers was conducted at the end of each Energy Best Deal 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 6,086.

³ 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 3,337.

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 to the relevant questions.

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

The ongoing effect of the 2012/2013 programme was also evaluated, using telephone interviews with 25 consumers and 25 frontline workers who attended Energy Best Deal sessions in 2012/2013.

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

Analysis of the 2013/2014 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.

As well as the main Energy Best Deal programme, this report also includes an evaluation of Energy Best Deal Extra. Energy Best Deal Extra advice appointments were available to people who attended Energy Best Deal group sessions as well as others who were referred through other channels. Citizens Advice provided contact details of people who had attended Energy Best Deal Extra one to one advice appointments and telephone interviews were undertaken with fifty of them. The advice appointments could cover a wide variety of topics and situations and so the telephone interviews used very open questions in order to capture this.

Throughout this report, the main Energy Best Deal group sessions are referred to as 'sessions', 'presentations' and 'training', while the Energy Best Deal Extra one-to-one advice appointments are referred to as 'appointments' and 'meetings'.

Consumers: questionnaire responses

Demographic information

In total questionnaire responses were received from 6,086 consumers who attended the Energy Best Deal sessions: 80% of these were from consumers in England, 10% in Scotland, and 10% in Wales. This represents 59% of the 10,349 consumers who attended Energy Best Deal sessions (the rest either were not submitted or a questionnaire was not completed). 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 respondents⁴. A breakdown of the questionnaire results by country can be found in the Annex Report.

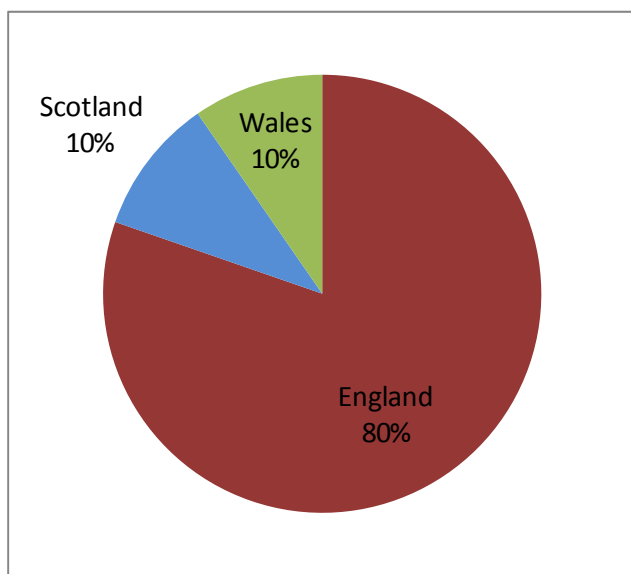


Figure 1: Country of respondents

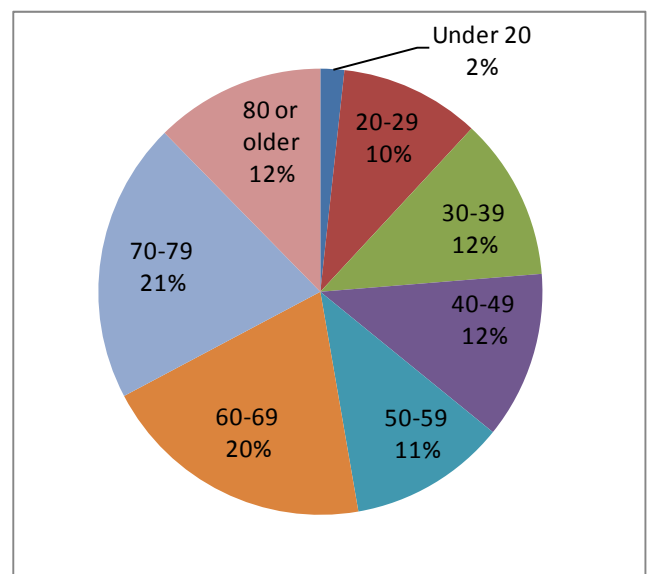


Figure 2: Age of respondents

⁴ 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.

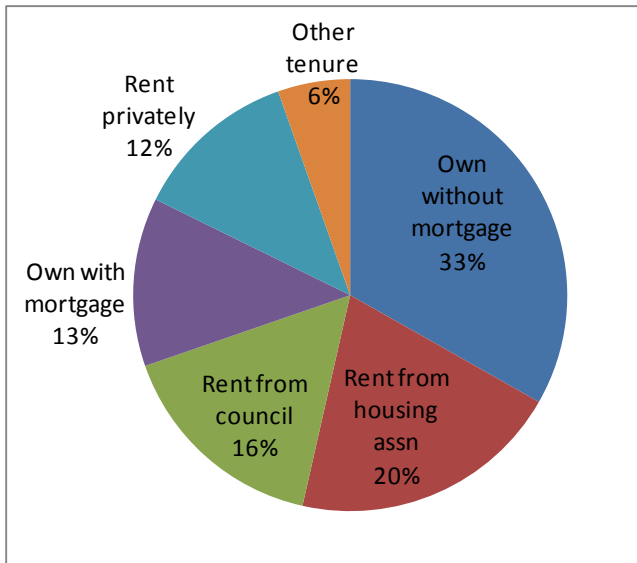


Figure 3: Tenure of respondents

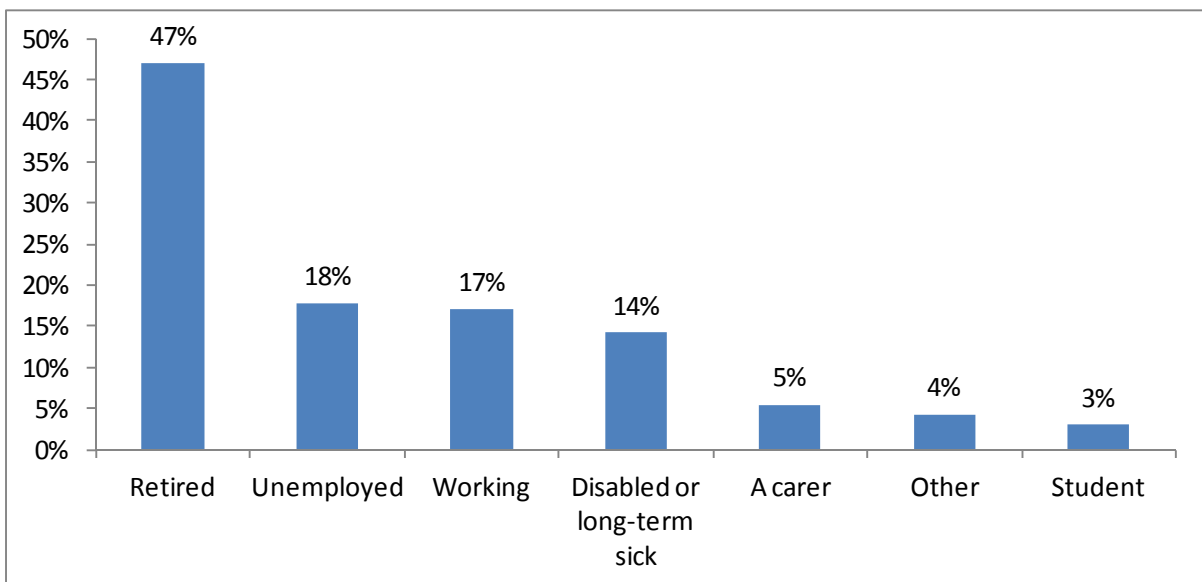


Figure 4: Occupation of respondents

Several respondents identified themselves as having more than one occupation (for example, a student and a carer) and so the percentages in Figure 4 sum to more than 100.

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 asked about their winter fuel bills (Figure 6). Thirty-eight percent of respondents said they were not able to heat their home to a comfortable level, with the majority (26%) saying they did not use the heating as much as they would like due to the cost, and the rest (12%) saying that they could not heat their home sufficiently due to the quality of the building fabric or the heating system. A fifth of respondents (21%) said that they had no concerns about their winter fuel

bills. Seventeen percent said they found their winter bills a financial strain, and a small minority (4%) said that their winter bills were impossible to manage and they were in debt to their fuel supplier.

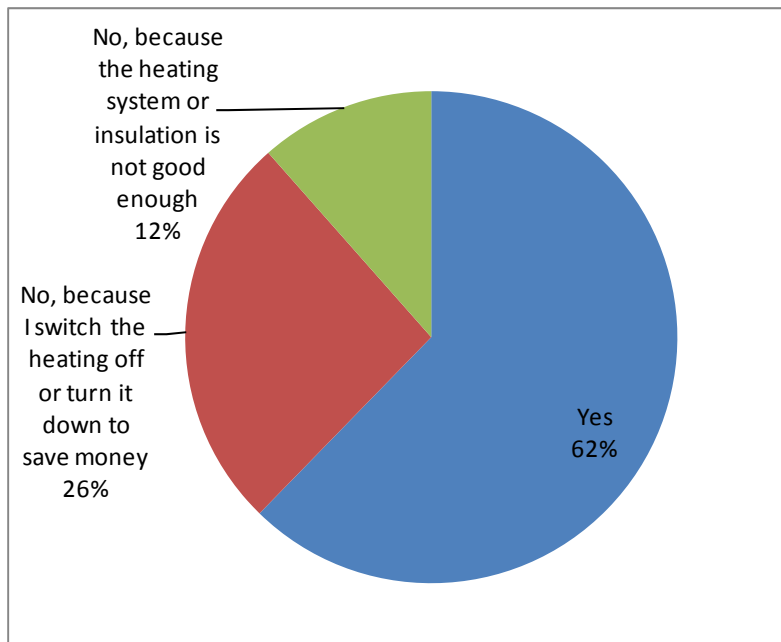


Figure 5: Can you heat your home to a comfortable level in winter?

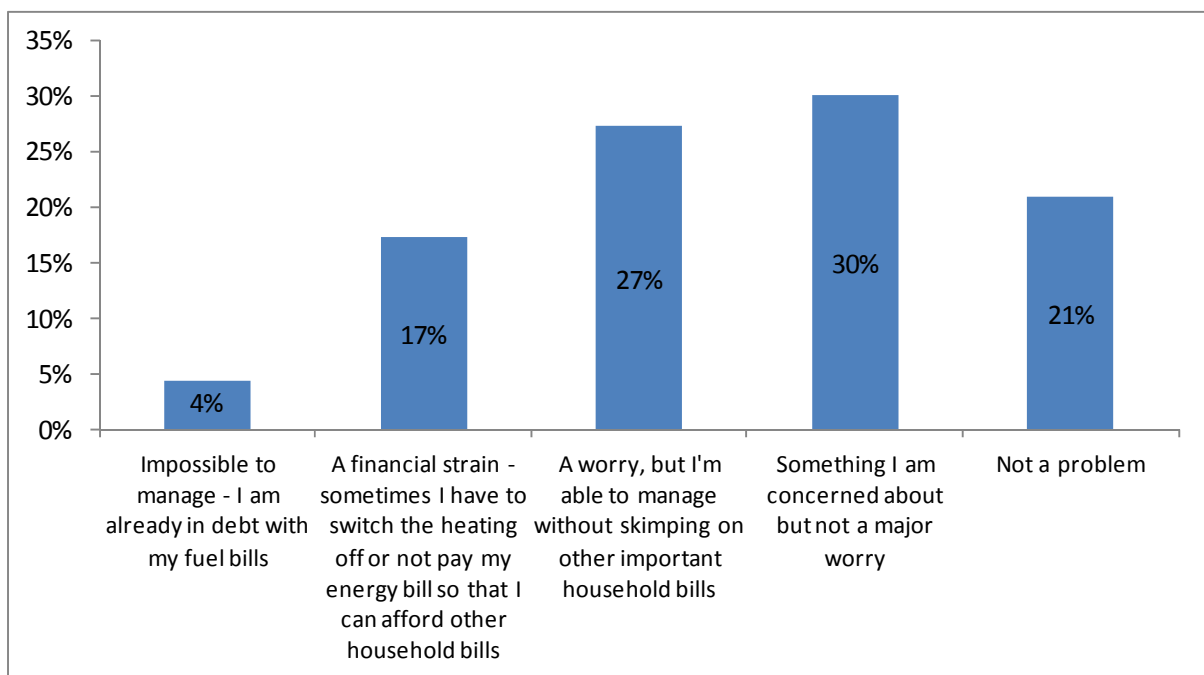


Figure 6: Attitudes to winter fuel bills

Experience and knowledge of switching prior to the session

Eighty-nine percent of consumers already knew that it was possible to switch energy supplier. Thirty-two percent of respondents had already switched suppliers *once* in the past, while a further 19% had switched more than once, making a total of 50% who had switched in the past. Nearly three quarters (72%) of those who had switched in the past were proactive switchers, having switched of their own initiative to get a better deal; 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-seven percent of respondents said they had never switched to a different tariff with the same supplier, while 26% had done so and the other 16% did not know whether they had or not⁵.

The impact of the session

Ninety-seven percent of those who answered said they found the session useful (this question was left unanswered by 7% of all consumer questionnaire 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 (69%) and information about how to switch was the second most useful (58%).

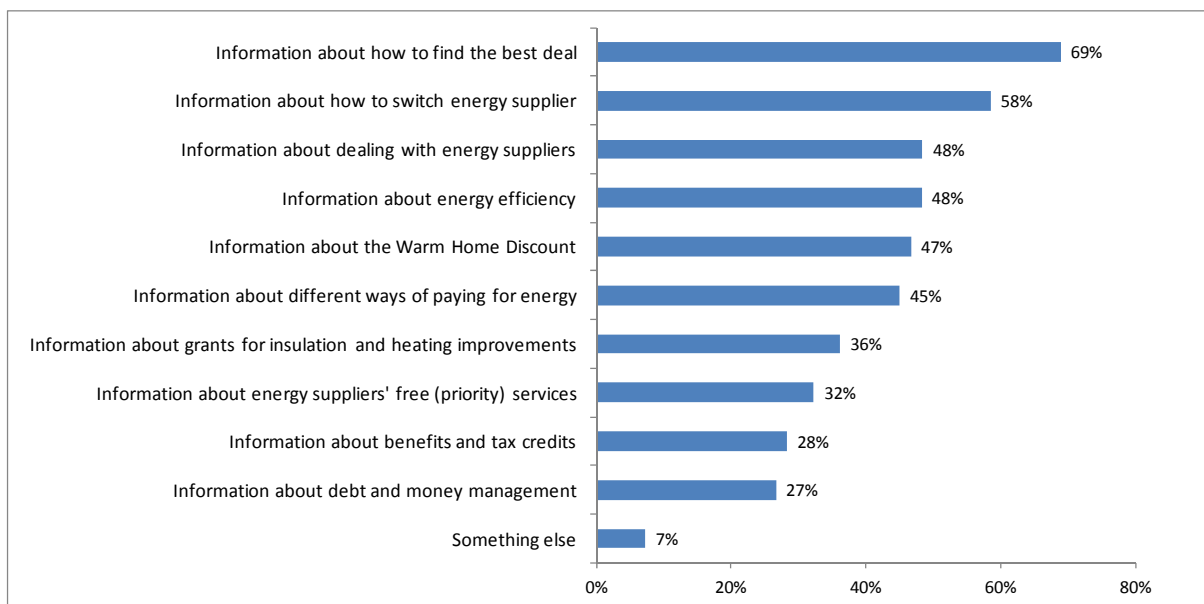


Figure 7: What did you find useful about the session?

Responses given under 'something else' included:

- Finding out about the Warm Home Discount
- Finding out about how much energy different appliances use
- Information about Green Deal
- Finding out about the Priority Services Register
- Learning how to read an energy bill
- Information about using storage heaters
- Finding out that men over 62 (i.e. not of pension age) can receive the Winter Fuel Payment
- Finding out about lesser-known energy companies
- Finding out that you can switch with a debt on a prepayment meter
- Finding out about ways that the Citizens Advice Bureau can help people

⁵ Total does not sum to 100 due to rounding.

Planned follow-up actions

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

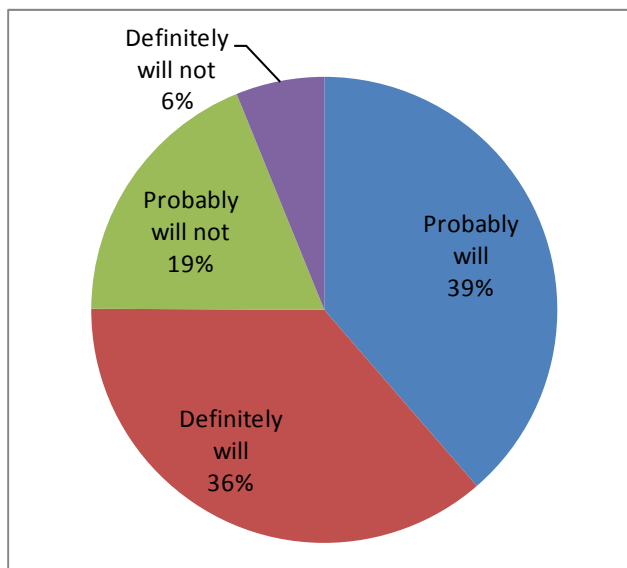


Figure 8: Will you do anything as a result of the session today?

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 (43% of respondents), while looking at switching websites and telling friends and family were also popular, at 30% and 28% respectively. Comments given under 'Other' included changing to direct debit, asking a family member for help with using a switching website, finding out about Charis grants, talking to their landlord, giving the supplier a meter reading, getting a basic bank account, and making a follow-up appointment with a Citizens Advice Bureau (CAB).

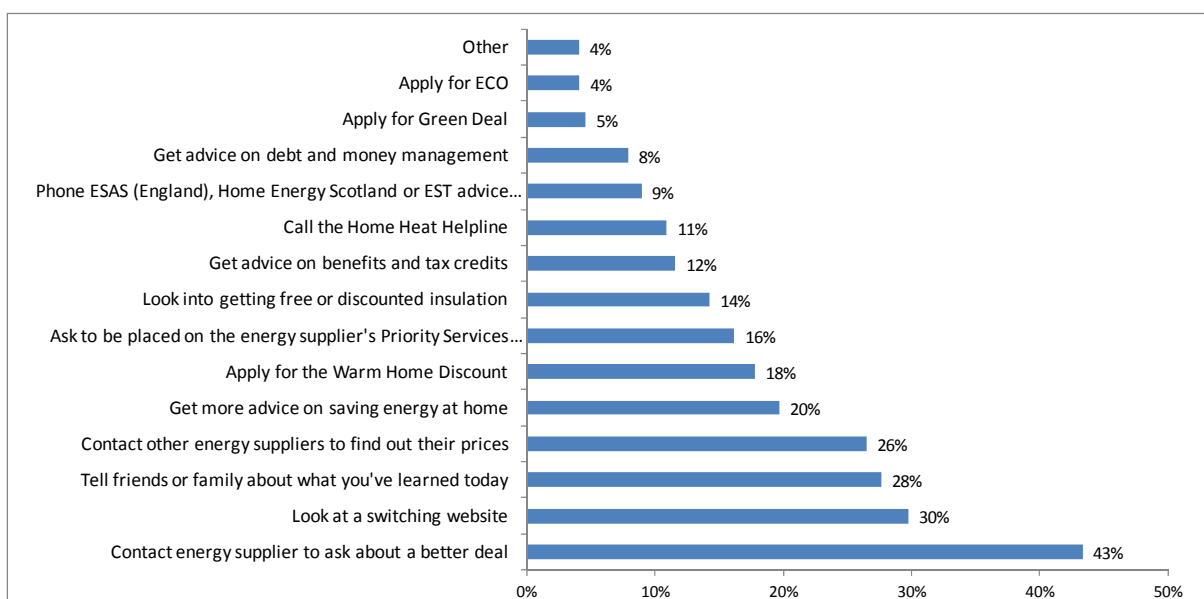


Figure 9: Planned actions following the session

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 three months after attending a session. Seventy-three percent (109) were from England, 15% (22) were from Scotland and 13% (19) 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 a grant, free or discounted insulation, or the Warm Home Discount;
- Sought advice on benefits, tax credits, debt or money management (specifically prompted by the Energy Best Deal session);
- Asked to be placed on the Priority Services Register;
- Took any steps to save energy in their home (specifically prompted by the Energy Best Deal session).

Each of these is discussed separately in the following sections. However, overall across all actions, a total of 111 people (75%) had taken at least one of these actions. Ninety-four people (63%) had told friends and family about something they had learnt in the session.

Of those that had not taken any action as a result of the session, four had taken energy saving measures but did not attribute them to the session. Some had been prevented from taking action by illness. One person said that she was put off switching supplier because people at the Energy Best Deal event had said that they had switched and then the tariff had changed and they had lost their saving (it is not clear what timescale this was over). However, it is unusual for an interviewee to say this: most comments indicated that consumers tended to be reassured by the group discussion forum that Energy Best Deal sessions can provide.

Looking for a better energy tariff

Fifty-three people (35% of all interviewees) had looked for a better energy tariff since the session. Forty-one (27%) people contacted their existing supplier, while 31 (21%) checked prices from different suppliers: these groups overlapped because 19 (13%) people checked prices from both their existing supplier and others.

Nineteen of the people who looked for a better tariff had switched supplier once in the past. Seventeen had switched more than once and the remaining 17 had never switched. Ten 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 intended 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 and which offered a better deal. The first column shows the numbers that checked prices: those that

checked 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.

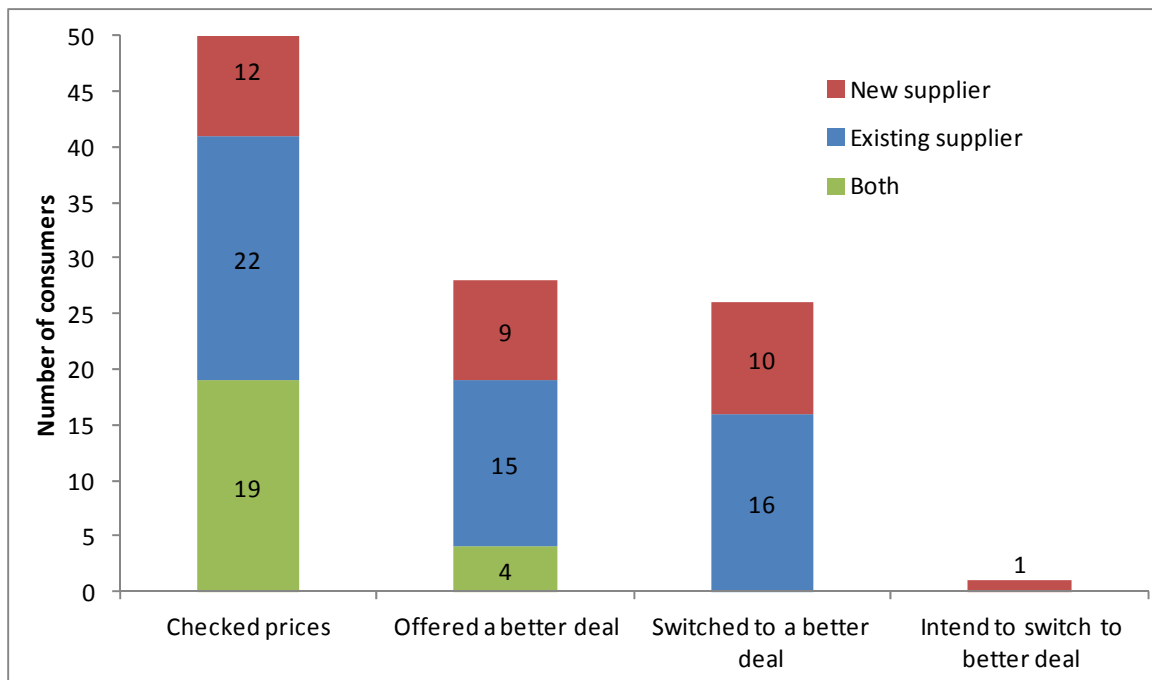


Figure 10: Looking for a better deal: results

Figure 10 shows that 28 of the 53 people who checked prices found a better deal (53%) and that 93% of those who were offered a better deal switched to it. Twenty-seven people (18% of interviewees) switched or were about to switch.

Where interviewees checked prices from different suppliers, they were asked what sources of information they used. Nineteen people (61% of all people who checked prices from a different supplier) used a price comparison website, with one additional person using a price comparison phone service. Five people phoned other energy suppliers directly, while one person looked at an energy supplier's website. Three people were helped by an advisor from CAB or other advice service, and one person asked friends and family. Three people said they were approached by energy suppliers (one by phone, one door-knocking, one unclear). People who relied on an approach from a supplier rather than investigating all the options themselves may not have received the best deal for them available on the market.

How did interviewees satisfy themselves that the tariff offered really was a better deal? Of the 19 people who had been offered a better deal by their current supplier, 6 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 that their own supplier had to offer but missed out on the best tariff for them on the market. Of the 31 that checked prices from a new supplier, most had shopped around using

price comparison services, made their own comparison in another way, or received help from an impartial advisor. One person had been approached by a supplier with a new tariff and before switching asked a CAB advisor to check that it was a good deal. One person had switched as a result of door-knocking by a supplier, which could mean that they did not obtain the best deal available for them on the market. However, this person did also ask another person to help check the tariff before switching.

Thirteen out of 31 people (42%) who checked prices from other suppliers were offered a better deal, while 19 out of 41 (46%) who contacted their own supplier were offered a better deal, so there was little difference in terms of whether existing or new suppliers could offer a better deal. There were four consumers who were offered a better deal with both their own and another energy supplier. Two of these switched to a better tariff with their current supplier, one switched to a different supplier, and the fourth decided to stay with the current supplier because the deal with the new supplier would only have saved a small amount of money for a limited time.

The 27 interviewees who switched or intended to switch to the better deals they found were asked how much they expected to save. Fourteen people had an idea of how much they would save. The largest amount saved was £430 per year while the smallest was £40 per year. On average the expected saving was just over £150 per year.

Of the 27 people who switched or intended to switch, eight had never switched supplier before, with four of these never even having switched to a different tariff with the same supplier. Eleven had switched once in the past and eight had switched more than once.

The process of switching supplier

Of the 26 people who had already switched to a new deal, 15 found the process 'very easy', nine found it 'easy' and two found it 'fairly difficult'. One of the people who had difficulties had been contacted several times by the old supplier to try to get the customer to return; meanwhile the new supplier did not take the direct debit payments and the consumer had to pay by debit card over the phone to keep the agreed tariff.

When asked what they found helpful about the process of switching, six people had positive comments, including that the comparison service was clear, the switch was straightforward, the supplier was helpful, the supplier did everything and that the consumer received a refund from the old supplier. One consumer also commented that it was very useful to have help from an impartial advisor as she has a small baby and so has a lot to think about.

Factors which discouraged people

Ninety-seven interviewees did not look for a better tariff. They were asked what put them off, and the reasons they gave are shown in Figure 11.

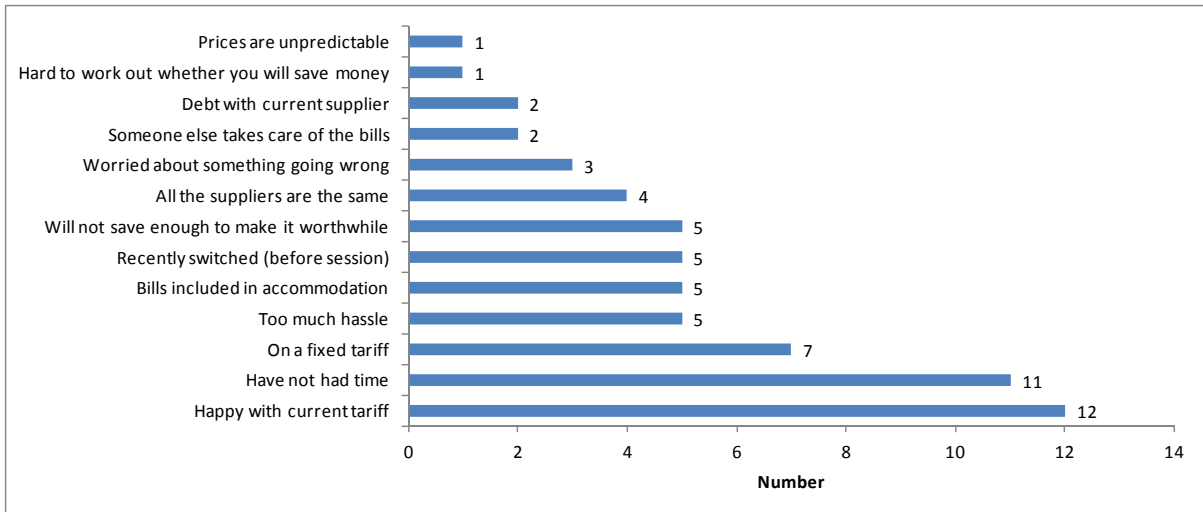


Figure 11: Factors which put people off looking for a better deal

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. A small majority of respondents gave a positive response, with almost a fifth only feeling positive about their own existing supplier.

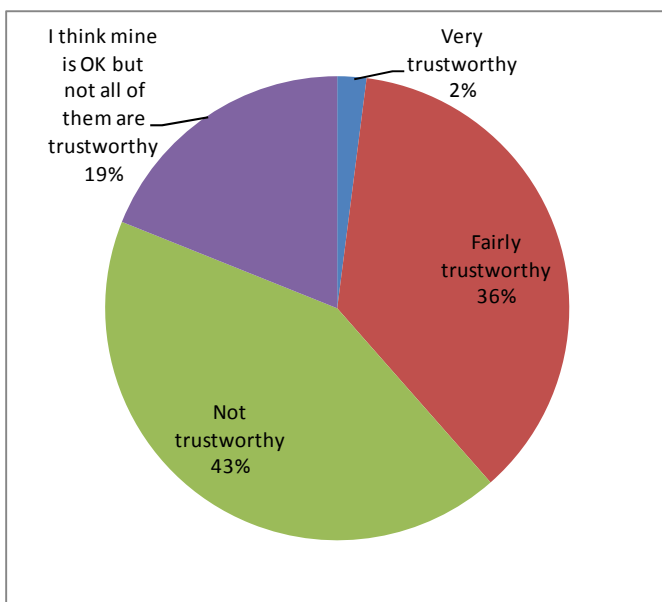


Figure 12: How do you rate the trustworthiness of suppliers?

Payment method

Five people (3%) had changed the way they paid for their energy since the session, with one more waiting for a prepayment meter to be installed. The majority changed from paying when the bill arrives to direct debit, with two changing to pre-payment meters. Those who had not changed payment method were asked why they had not done so. The reasons are shown in Figure 13. Only reasons given by more than one person are shown (while some people gave more than one reason).

A large majority either said they were using the best payment method (which is more widely defined than just cheapest method), or that they were happy with the current payment method. Reasons given by only one person each were:

- Not comfortable with the idea of direct debits
- There is a cost to getting rid of the pre-payment meter
- The consumer does not want to change anything
- The consumer is on a fixed tariff and assumes that this also means the payment method is fixed
- The consumer is moving house
- The consumer does not want to phone the supplier because it is expensive (and the supplier did not respond to email)
- The consumer has debt on their prepayment meter
- The consumer has previous bad experience of direct debits
- Someone else deals with the bills
- The consumer needs support to make changes, due to ill health

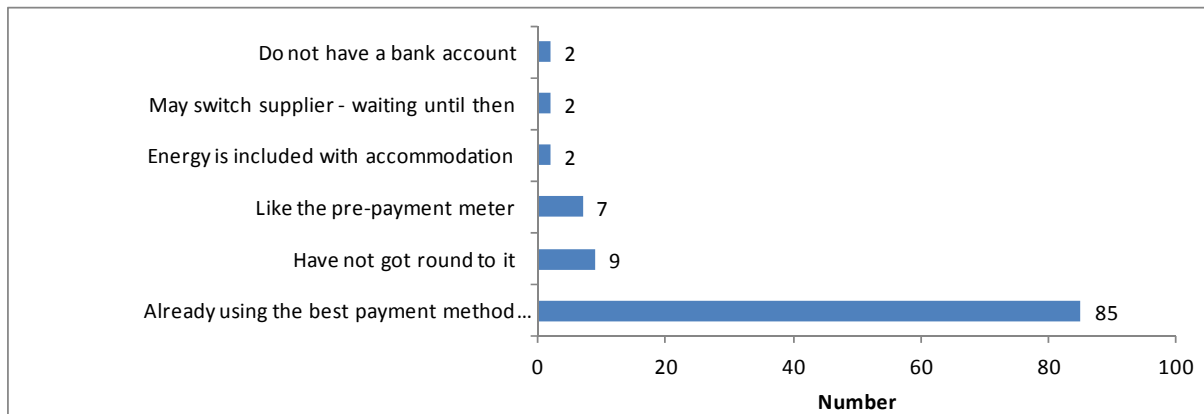


Figure 13: Reasons for not changing payment method

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 people had done so (17%), with a further three saying they had looked for information but not as a result of 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). Some people gave more than one answer. The internet and the local council were equally popular sources of information, with 6 people naming each of these sources. There is a marked difference from last year's evaluation, which found that 12 people used the internet for further information but only three looked to their local council.

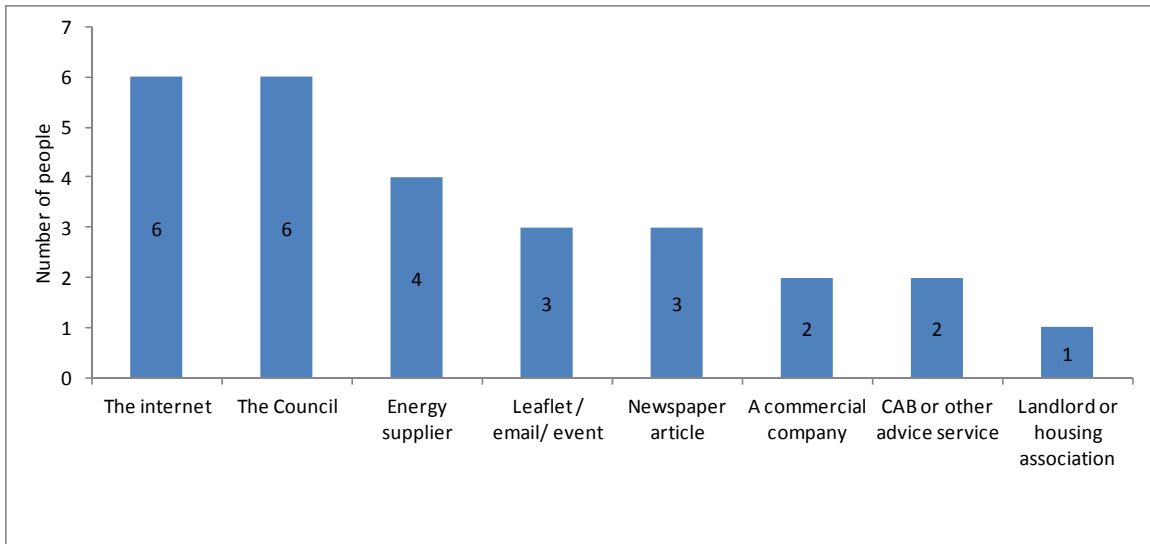


Figure 14: Sources used to find further information on energy efficiency and heating improvements

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-two people (48%) said that they had done something as a result of the session, with a further 17 saying they had done something, but not as a direct result of the Energy Best Deal session. Figure 15 shows the actions of those who said they did something as a direct result of the session.

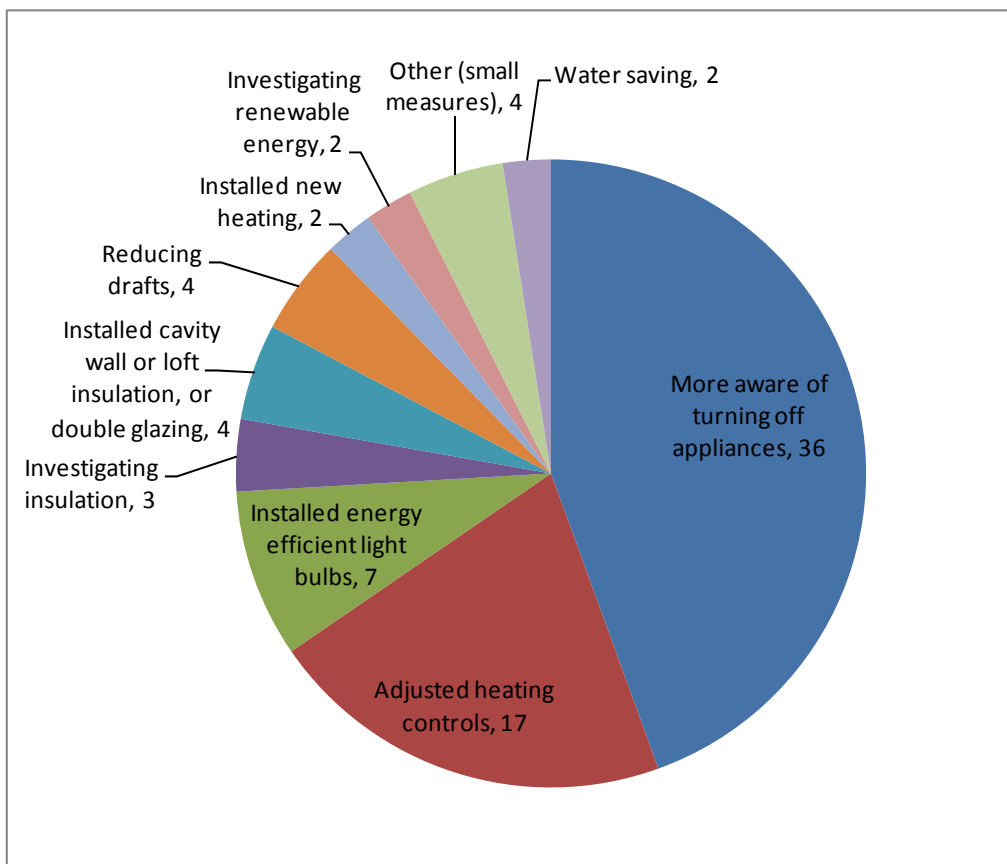


Figure 15: Energy efficiency actions taken

Identifying consumers qualifying for ECO⁶ Home Heating Cost Reduction Obligation

Consumers were asked two basic questions about benefits and income, which were designed to identify most people who would be eligible for ECO HHCRO funding for heating measures for their homes.

- Does anyone in your household receive either Pension Credit or Child Tax Credit?
- If the latter, is your household income under £15,860?

There are other qualifying criteria for HHCRO, and so people who answer no to these questions could still be eligible if they claim certain other benefits; however, 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 a risk when asking what benefits are claimed.

Eighteen interviewees (12%) receive Pension Credit, while 21 (14%) receive Child Tax Credit and have a household income under £15,860, making a total of 26% of interviewees who meet the above criteria. However, for HHCRO, people living in social housing are not eligible⁷. Applying this further criteria leaves seven Pension Credit recipients (5% of all interviewees) eligible and eight Child Tax Credit recipients under the income threshold eligible (5% of all interviewees), making a total of 10% 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 of interviewees taking each action is shown in Figure 16 below. Forty-three people (29%) had taken at least one of these actions, with eight taking two or more actions. The most common action was applying for the Warm Home Discount (20 people), followed by seeking advice on debt and money management and applying for free or discounted insulation from a non-energy supplier source.

⁶ 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))

⁷ 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.

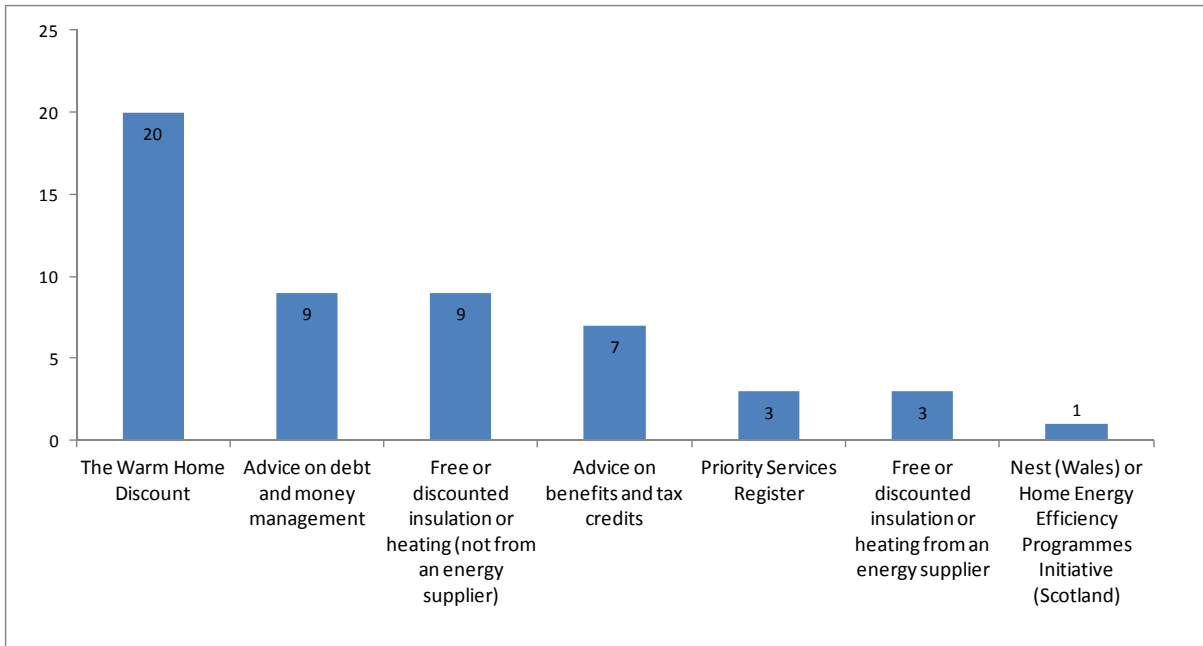


Figure 16: Further actions taken by interviewees

Information passed on to friends and family

Ninety-four people (63% 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 (in an average space of three months between the Energy Best Deal session and the interview).

Frontline workers: questionnaire responses

Profile

In total, 5,408 frontline workers attended Energy Best Deal sessions. Questionnaires were received from 3,337 frontline workers, equal to 62% of all attendees⁸. Figure 17 shows how this breaks down between countries.

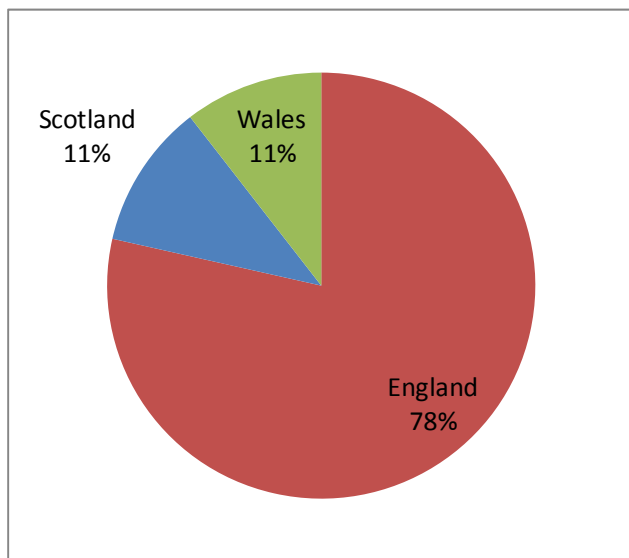


Figure 17: Frontline worker questionnaire respondents by country

Figure 18 shows the organisations represented by the frontline workers. The largest group was advisors from Citizens Advice Bureaux, with the second largest being 'other', which included a wide variety of organisation types including Home Start (a family support charity), mental health support, specialist health services, community development, food banks, lunch club organisers, and Age UK. The third largest group was housing associations with 18%.

⁸ 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.

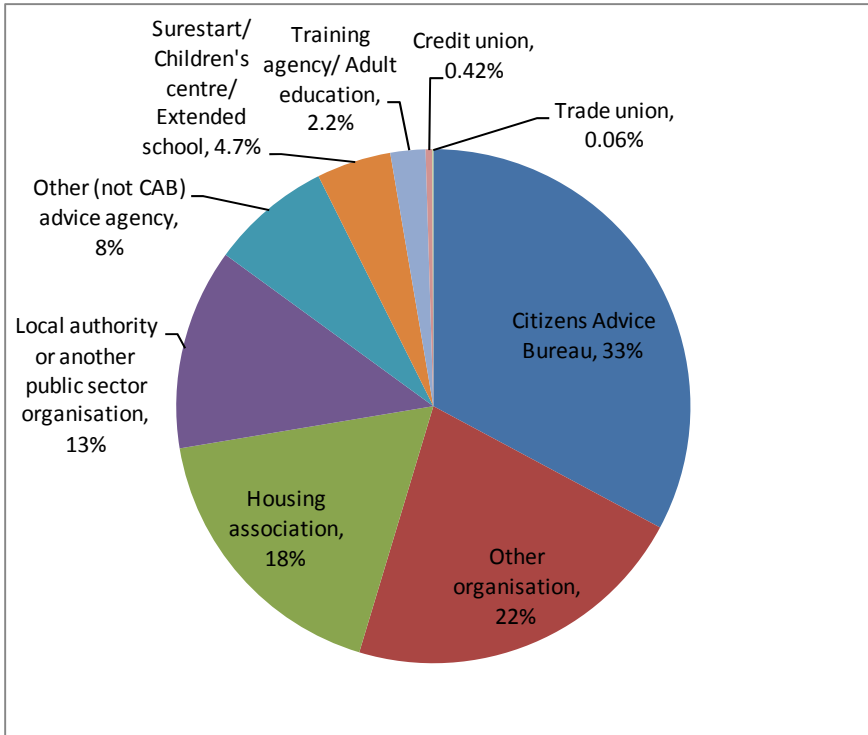


Figure 18: Frontline worker organisation types

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 (44%).

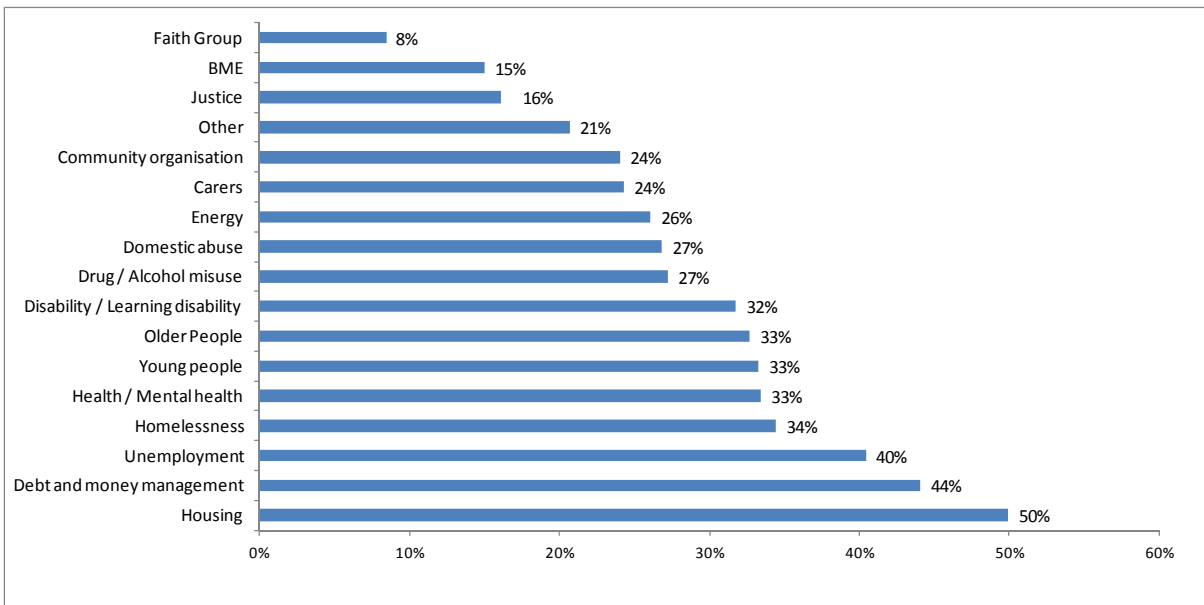


Figure 19: Frontline worker organisation: specialisms

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 'benefits and tax credits' and 'debt and money management'. The least commonly advised-on topics were specific programmes such as NEST, Home Energy Efficiency Programmes Initiative (HEEPI), ECO and the Green Deal.

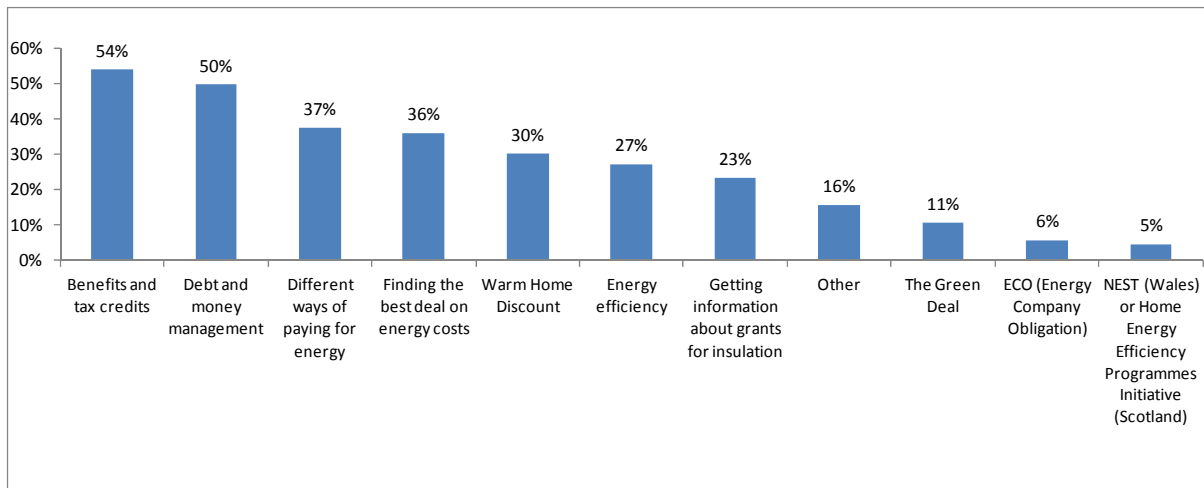


Figure 20: Previous advice-giving

The impact of the session

Eighty-one 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 estimated that 60-80% of their clients are in, or at risk of, fuel poverty, while 20% estimate this figure to be between 80% and 100%.

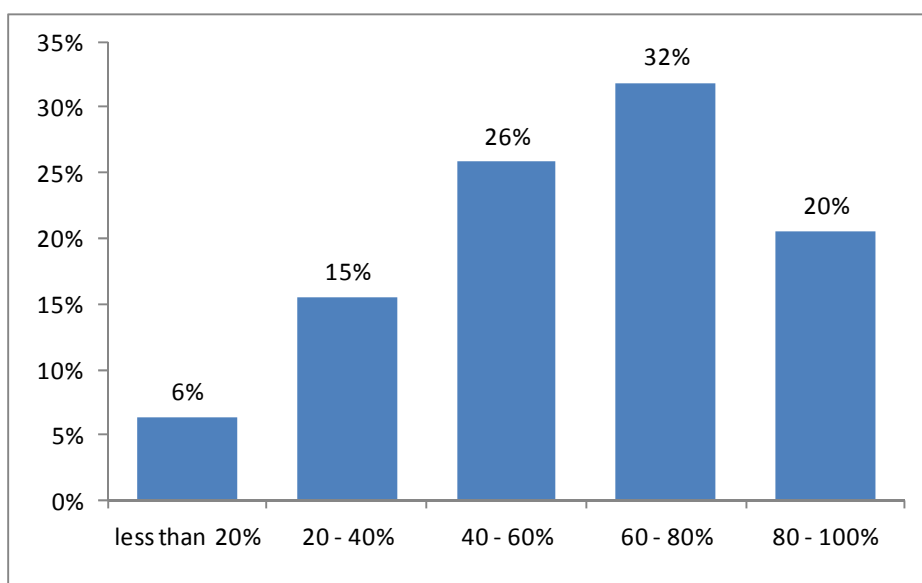


Figure 21: Estimated number of clients in fuel poverty

Frontline workers were asked if they felt better informed as a result of the session. Ninety-seven per cent said they did; 52% to a great extent and 45% to some extent. This is illustrated in Figure 22. In addition, 75% of frontline workers said they intended to look for a better deal on their own energy as a result of the session.

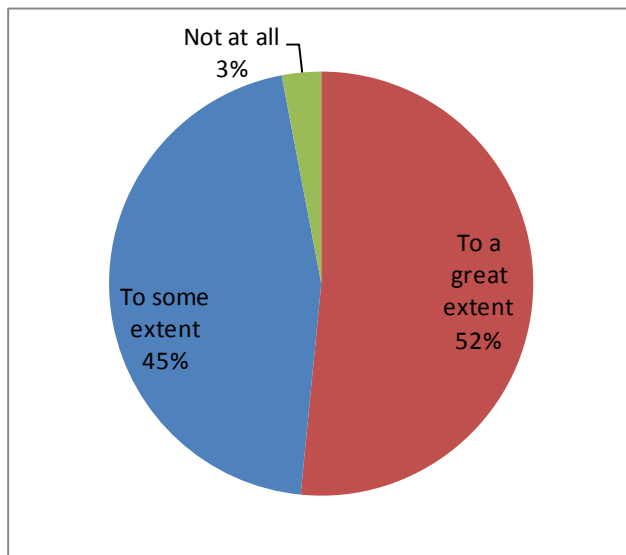


Figure 22: Do you feel better informed as a result of the session?

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. The columns showing NEST and HEEPI programmes only show the responses of those located in Scotland and Wales, as this question is not relevant to those working in England. In total, 93% of frontline workers felt more confident in one or more topics following the session, while 6% felt less confident on one or more topics.

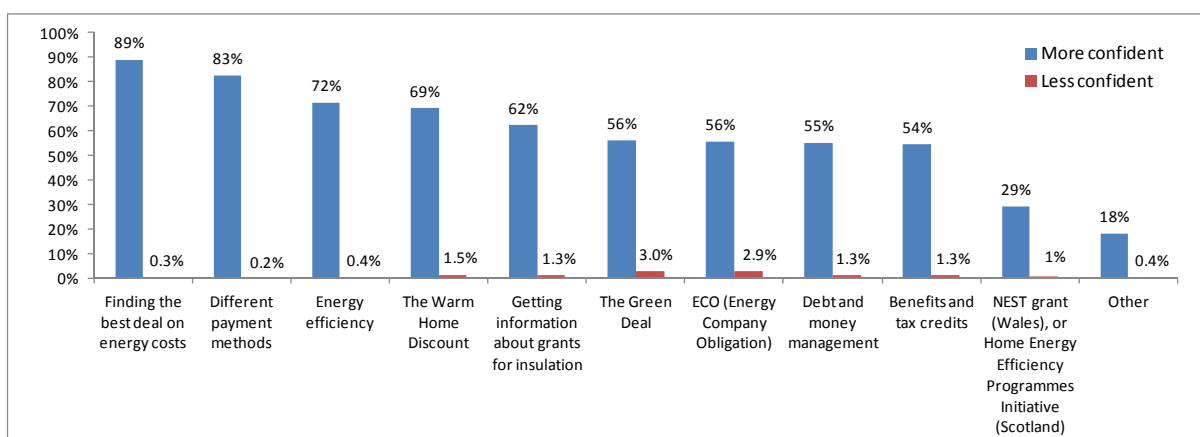


Figure 23: Increases and decreases in confidence after the session

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 very small number of frontline workers felt less confident following the session.

Those who felt less confident on any of the topics were asked why. Some said that it was because giving advice is not part of their role, while others said that they had known little about these subjects before the presentation and it was a lot of information to take in. However some commented that they now knew more about where to signpost people for advice. Some people commented that there were some complex topics - in particular benefits and the Green Deal - so they felt that they would need more information, or to study the topic more themselves, before they could be confident. Some people felt that they would not want to advise on the Green Deal, in some cases because it is a loan and in some cases just because they felt it was not a good scheme.

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 0 to 9,500 (with the higher numbers being workers at housing association who plan to disseminate the information through a newsletter), with a median of 15. The question was left unanswered by 32% of all those frontline workers who returned a questionnaire.

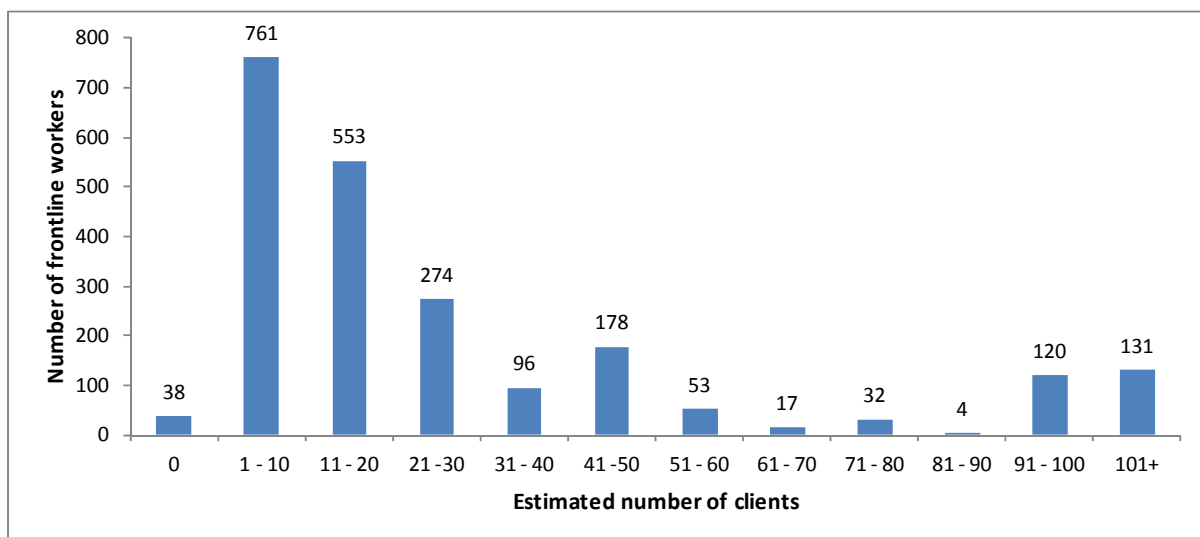


Figure 24: Number of clients information will be passed on to

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-five per cent said they would pass on information (66% 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 0 to 500. The answer given here reflects 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 are cases where frontline workers can communicate information to many people via a newsletter or other media. The median number of colleagues was 18. The question was left unanswered by 24% of all those frontline workers who returned a questionnaire.

In the case of both clients and colleagues, face-to-face dissemination will be more effective than dissemination through newsletters because there is no guarantee that people will read the

newsletters, and so the quality of dissemination is likely to be uneven across the estimated numbers of clients and colleagues.

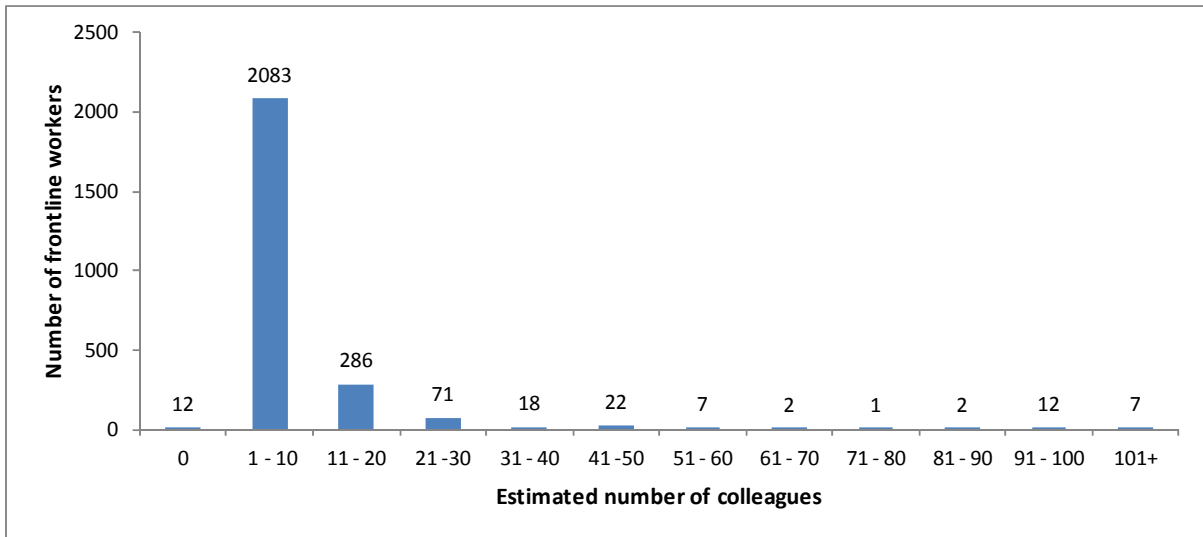


Figure 25: Number of colleagues information will be passed on to

Frontline workers: follow-up interviews

A total of 150 frontline workers were contacted an average of three months after the session for a follow-up interview. Their distribution between the three countries is shown in Figure 26.

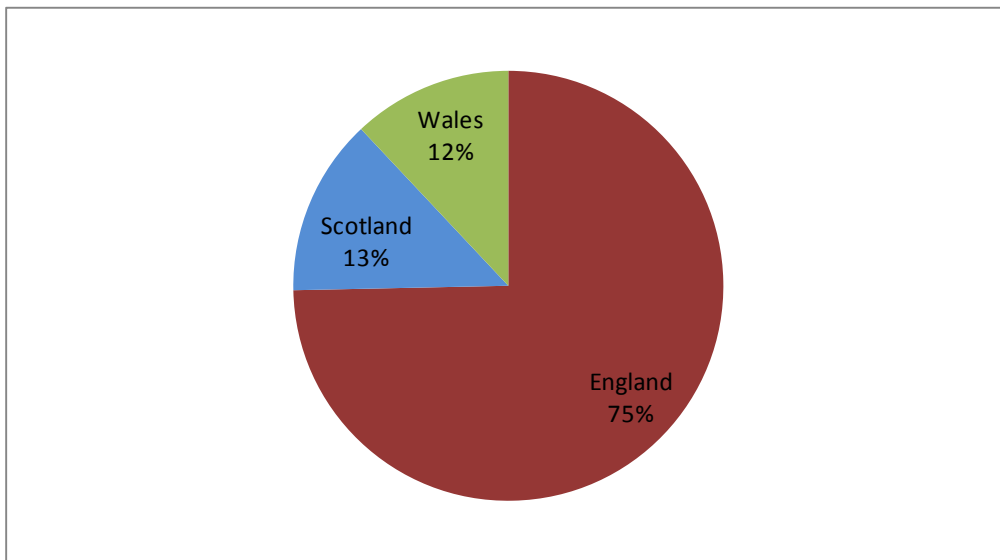


Figure 26: Frontline worker interviews - country

The organisation type of the frontline worker interviewees is shown in Figure 27.

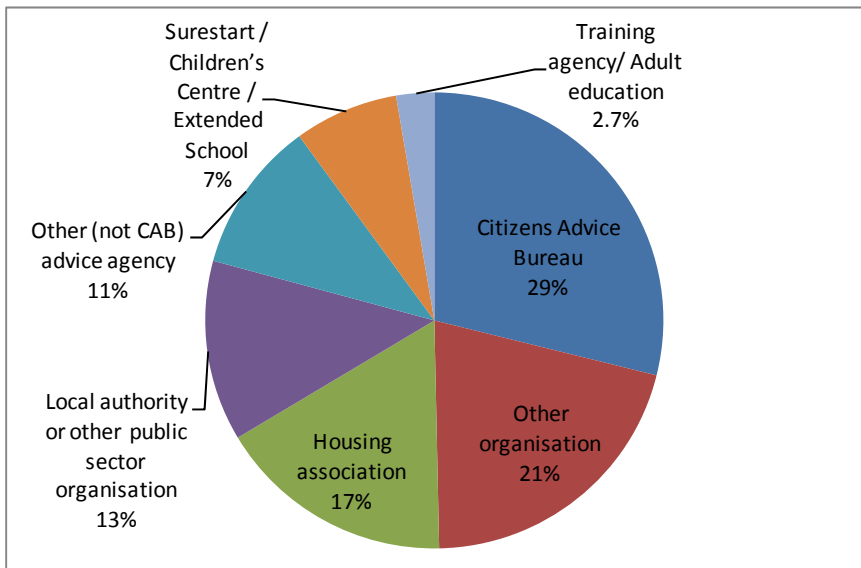


Figure 27: Frontline worker interviews - organisation type

The specialisms of the frontline workers' organisations are shown in Figure 28. These are almost the same as those for the wider group of frontline workers represented in the questionnaire results.

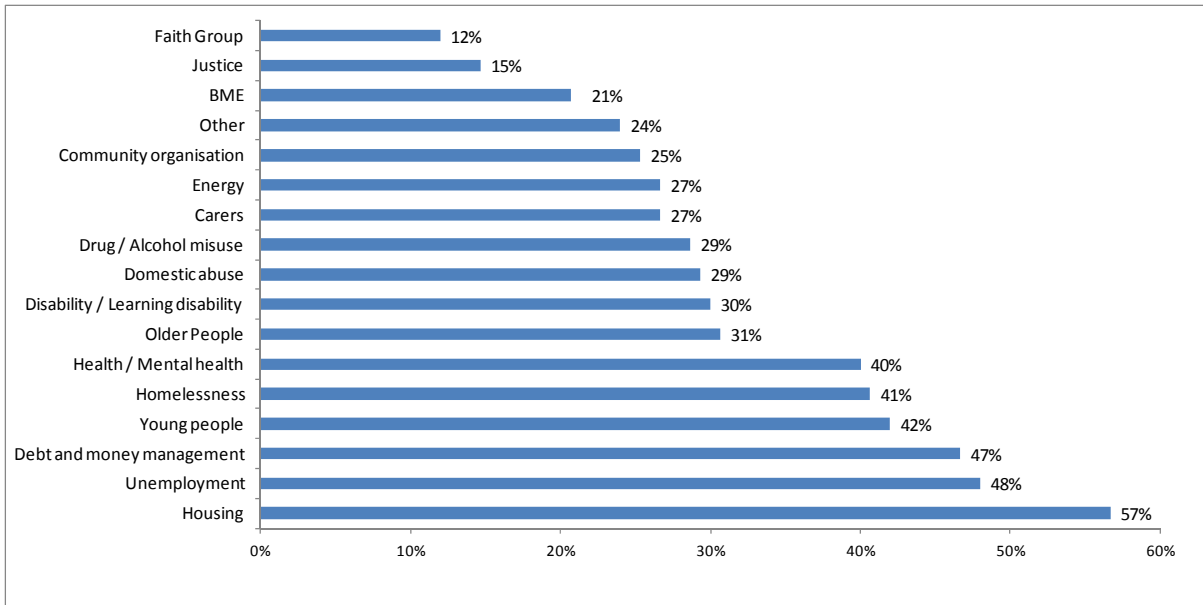


Figure 28: Frontline worker interviews - organisation specialisms

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 1 is no knowledge and 5 is highly knowledgeable. Figure 29 shows the average score for levels of knowledge before and after the presentation. The largest increase in average score was in the topic 'Grants for insulation and heating', followed by 'Finding the best deal on energy and dealing with suppliers'.

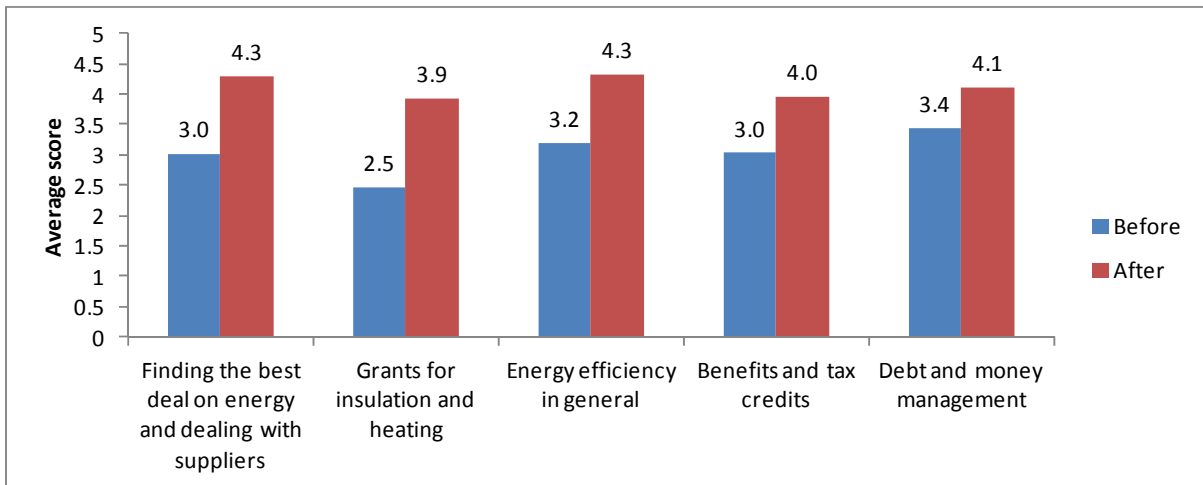


Figure 29: Levels of knowledge in topics covered in the session: average scores before and after

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 30. For each topic, 'highly important' was the most commonly chosen option. For 'benefits and tax credits' and 'Debt and money management', the majority chose 'highly important'.

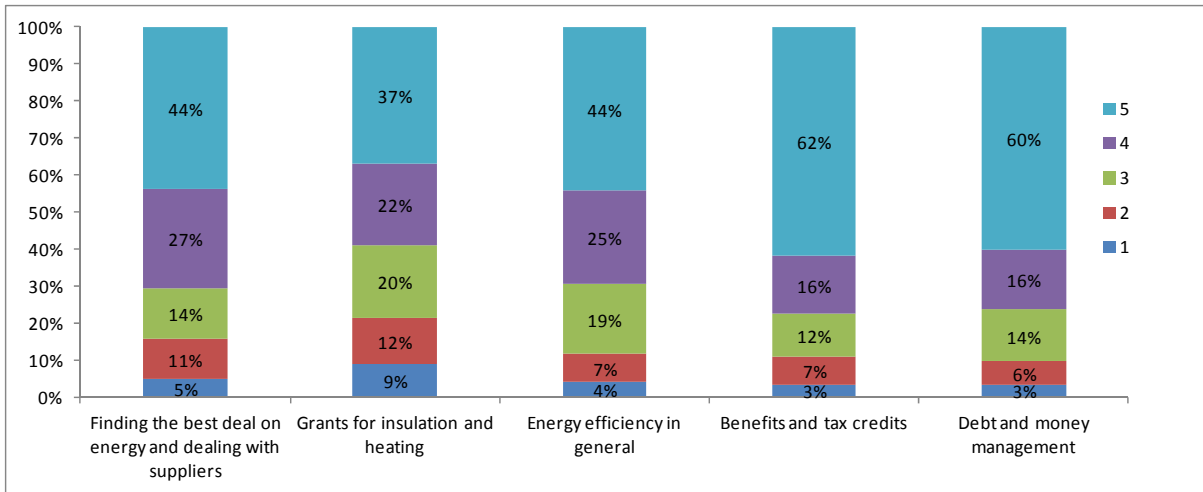


Figure 30: Importance of session topics in terms of interviewees' job roles

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 31. Some frontline workers also identified specific aspects they found useful, such as information about grants and white goods available from suppliers, the ability to request money back when energy bills are in credit, how to deal with suppliers, finding out how much energy different appliances use and how much they cost, and the information pack provided at the end of the session.

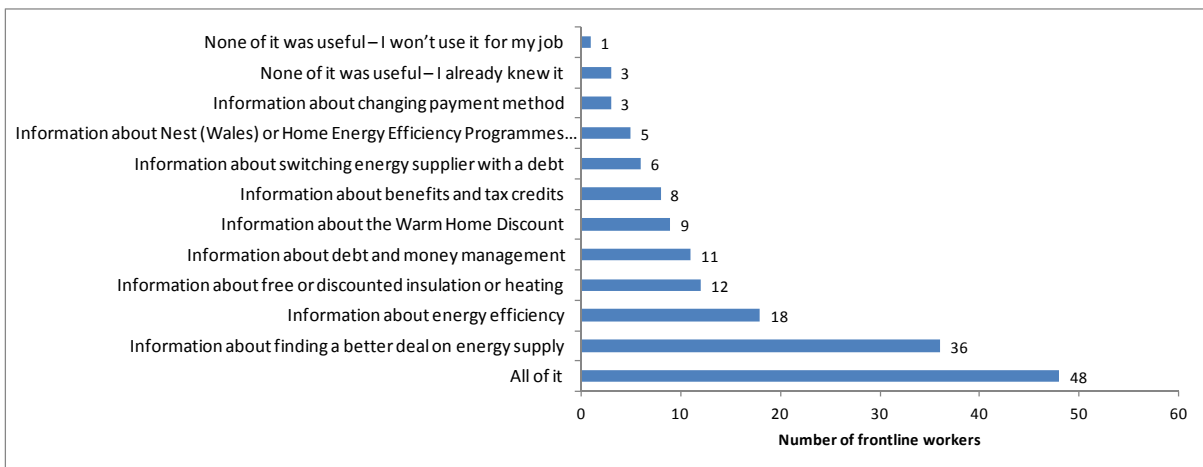


Figure 31: Did you find any part of the presentation particularly useful in helping you do your job?

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. These are shown in Figure 32.

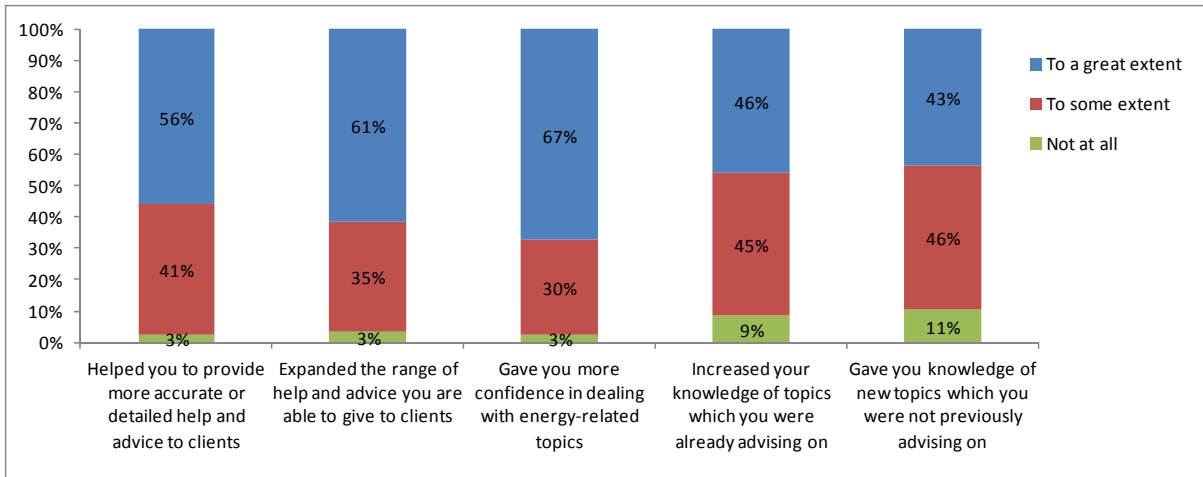


Figure 32: Effect of session in terms of advice giving

The majority of interviewees found that the session helped them to a great extent in terms of allowing them to provide more accurate or detailed advice, expanding the range of help and advice that they were able to give to clients, and giving them more confidence in dealing with energy-related topics.

Nine percent (13 people) found that the session did *not* increase their knowledge of topics that they were already advising on; however, five of these people found that the session did give them knowledge of *new* topics. Eleven percent of interviewees (16 people) found that the session did not give them knowledge of new topics that they were not previously advising on; however, 12 of these people found that the session did increase their knowledge of topics they were previously advising on.

Interviewees were asked which topics they had given advice on since the presentation. The answers are shown in Figure 33. For the question about NEST and Home Energy Efficiency Programmes Initiative, the result is shown only as a percentage of those frontline workers located in Scotland or Wales, as the question is not relevant to those working in England.

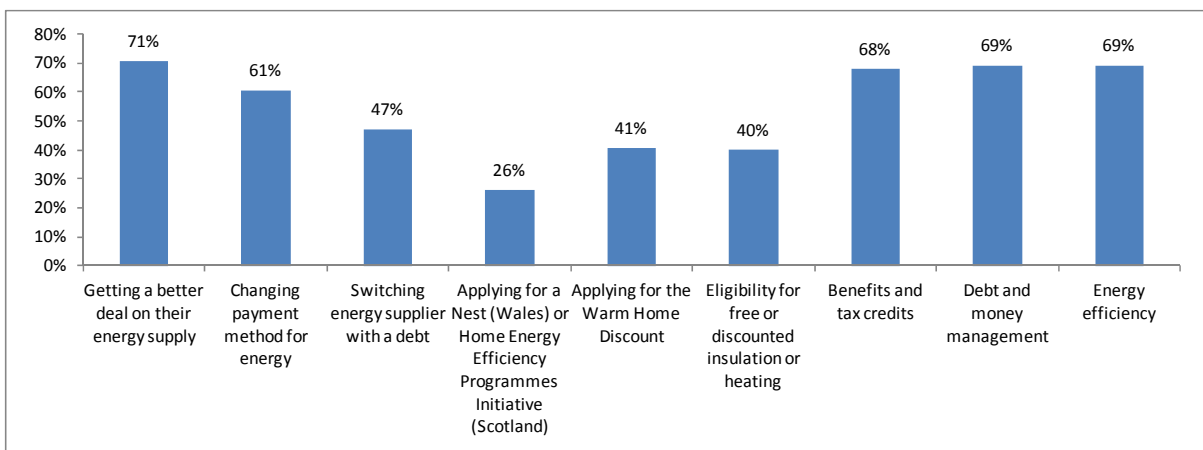


Figure 33: Topics advised on since the presentation

Seventy one percent of interviewees had given advice on getting a better deal on energy supply, while sixty-nine percent had given advice on energy efficiency. Eighty-seven percent had given

advice on at least one Energy Best Deal topic since the session, and 60% of these said they would not have been able to provide as much information if they had not attended the session.

Interviewees were asked to estimate how many clients they had provided information to since the session. The total number across interviewees was 4,750, but this was skewed by some large numbers where interviewees were including members of the public spoken to at events and the number of clients reached by a group of other frontline workers managed by the interviewee. Six people had not passed information on to anyone while ten said the question was not applicable, for example where the interviewee was a trainee who had not yet started giving advice, and in addition two people did not want to estimate a figure. The median number of clients that information was passed on to was thirteen people per frontline worker⁹. The distribution is shown in Figure 34.

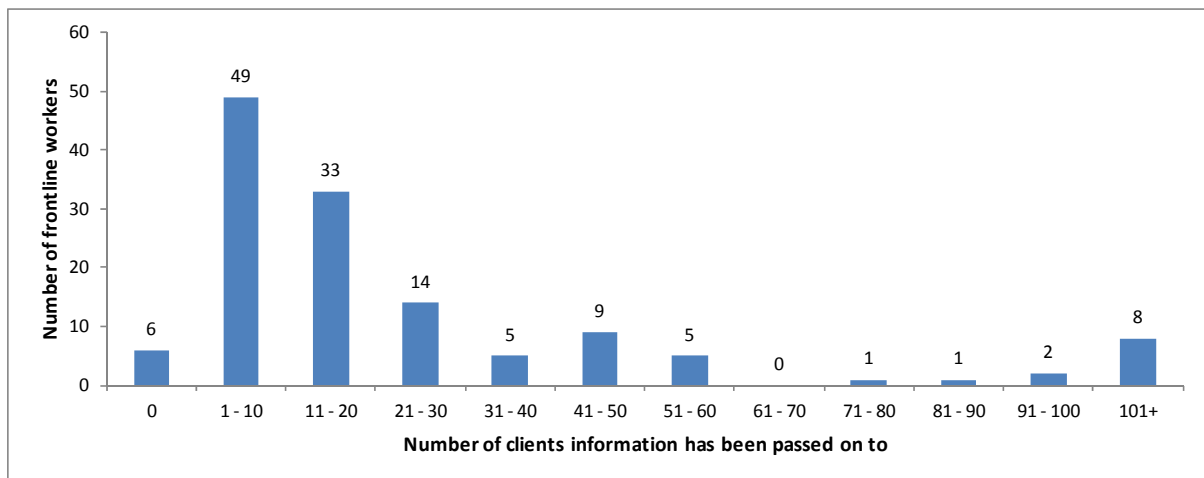


Figure 34: Number of clients information has been passed on to since the session

Frontline workers were also asked what percentage this represented of the total number of clients they had seen in this time. The mean was 50% of clients¹⁰. The distribution is shown in Figure 35.

⁹ Including those who had not passed information to anyone, but excluding those who said the question was not applicable to them.

¹⁰ As above, including those who had not passed information to anyone, but excluding those who said the question was not applicable to them.



Figure 35: Percentage of clients that information has been passed on to since the session

Sixty-one percent of the interviewees said that they would not have provided as much information to as many clients without attending the session, while 26% said they would have provided the information even if they had not attended the session, and 13% were not sure. However, two-fifths of those who said they would have provided the information anyway said that the session enabled them to do so more effectively. Reasons for this were that the session refreshed their knowledge, that they would have had to do more of their own research which would have taken longer and that they would not have been able to provide the information with as much confidence without having attended the presentation.

Ninety-seven percent of interviewees said that they would use information from the presentation to help clients in the future.

Four people had said on their questionnaire responses that they felt less confident on one or more topics following the session. Two of these said in the interview that they could not remember the reason, although one thought that it might have been because the other people in the room felt insulted that debt was covered in the presentation when they were all in employment (from which we can infer that this frontline worker attended a session targeted at consumers). The third person found that a higher level of knowledge was assumed at the session than he had, while the fourth said that it would have been helpful to have a handout summarising the information. The booklet which is provided at the sessions is already quite long and includes links to further sources of information. The booklet is designed to be used by consumers and frontline workers from many different backgrounds and so it is not appropriate to add more detail to it. Therefore it could be useful to provide a separate handout to cover more detailed information about the ECO and Green Deal, and links to more detailed information, for those who request it.

Frontline workers were asked what the most common energy-related issue was that their clients seek help with. By far the most common answers were affordability of energy and dealing with energy debt.

Interviewees were also asked if there were any energy-related issues that their clients seek help with which were not covered in the presentation. Most said that all issues were dealt with. Eleven people thought of specific issues. Some of these were things which should have been covered in the presentation but were not covered in enough detail for that individual frontline worker's needs:

- Negotiating a change of meter with supplier (including changing to prepayment meter)
- Dealing with debt and negotiating payment with energy suppliers
- Money management
- More detail on dealing with debt
- Most efficient ways of heating the home

Other things which frontline workers identified as energy related issues which were not covered in the presentation were much more specific:

- Dealing with a faulty meter
- More information about energy companies
- Dealing with door knocking / telesales people selling energy tariffs and misleading 'free boiler' offers
- More information about PV, such as tariffs and 'rent a roof' schemes
- Specifics about speaking to landlords for private rented homes
- Upgrading the existing heating system in housing association properties

The fact that some frontline workers needed more detailed information than others on the topics covered in the presentation, while others had specific queries which would have been too much detail for most attendees, suggests that it could be useful to have an online resource or forum where frontline workers can ask these questions (although in some cases this information will already be available, for example in Citizens Advice's [adviceguide.org.uk](https://www.adviceguide.org.uk))

Passing information on to colleagues

Seventy-four frontline workers (49%) said that they had passed some information from the Energy Best Deal session on to their colleagues. A further four people said they had passed on information but only by leaving the paperwork in a place where colleagues could look at it or by sharing via Facebook. Thirty-five more people (23%) said that all of their colleagues had been at the presentation or had attended previous Energy Best Deal sessions, so they had no opportunity to pass on information.

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 twenty (due to several people passing on the information via staff meetings and training sessions to groups of 20-40 people) and the median to four.

In addition, 73% 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, 52% of frontline workers had looked for a better deal on their own energy supply. Of these, 35 people (23% of all frontline workers interviewed) had switched either tariff or supplier, or were in the process of doing so. This figure was not very different to the figure for consumers (27 consumers, 18% of all those interviewed, had switched or were about to).

Frontline workers were asked if the presentation had prompted them to save energy in their home. Seventy-nine people (53%) said that it had. These people were mainly taking small actions to reduce electricity consumption from appliances and to reduce heating use, such as draughtproofing, buying energy saving bulbs, insulating the hot water tank, and not over-filling the kettle. In terms of larger scale actions, one person had insulated their loft and another had taken advice about solid wall insulation and solar panels. Twenty-two people said they were already saving energy at home before the session.

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 36 to Figure 38. Consumers and frontline workers both gave very similar answers. In terms of the presentation skills of the trainer (Figure 36), the majority found these to be excellent, with almost all of the remainder rating them as good. Comments about the quality of the presentation reflected the variety of different locations and circumstances that the presentation was delivered in: some people said that the trainer did well to make themselves heard with a noisy audience (in some cases this was because attendees had their children with them). Many said that their trainer had a clear voice, although there were also people who were hard of hearing who struggled to hear what the trainer was saying. Some comments praised the location while others found the location of their presentation uncomfortable or hot / cold, with one commenting that this was due to a lack of community buildings in their area.

Several attendees commented that the trainer had turned a boring subject into a fun and interesting presentation. However one frontline worker interviewee complained that the session had just consisted of the trainer reading out the slides, so they could have saved time by just reading it themselves.

One person commented that there was too much focus on using the internet to find information, at a presentation where most people were elderly and were unlikely to be comfortable using computers. Another commented that the session was fitted to local needs by providing an interpreter as some of the audience did not speak English as their first language.

Consumer interviewees were full of praise for the presenters of their session, with comments such as 'brilliant, very approachable', 'engaging', 'very supportive', 'very helpful', 'very clear', 'informed', 'thorough' and 'very good listener'.

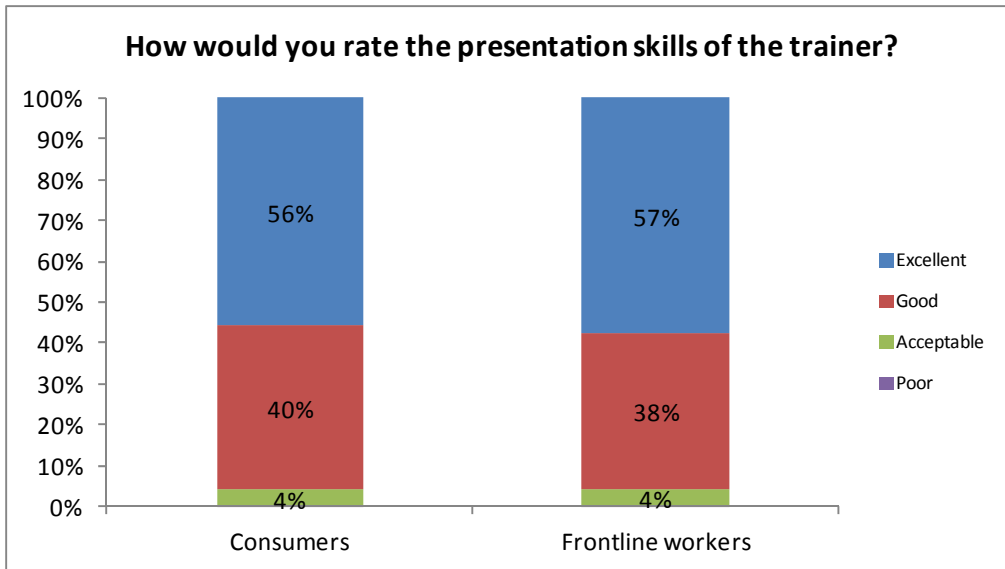


Figure 36: Ratings of the presentation skills of the trainer

The majority of attendees rated the materials used during the session (Figure 37) as good, with most others rating them as excellent. Six percent of consumers and seven percent of frontline workers rated them as acceptable.

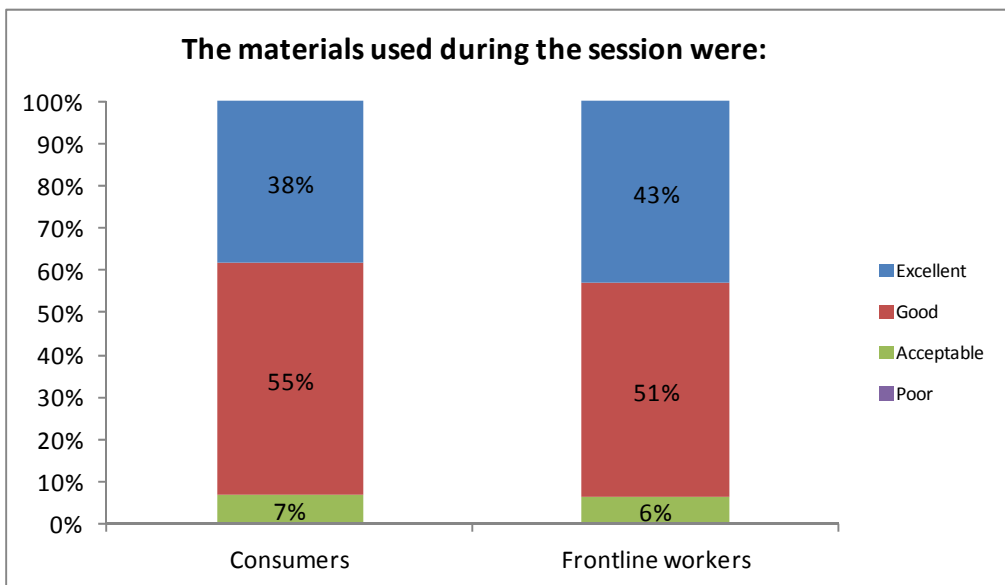


Figure 37: Ratings of the quality of the materials used during the session

The majority of consumer attendees rated the materials provided to take away (Figure 38) as 'good', with most others rating them as 'excellent'. Almost equal numbers of frontline workers rated the materials as either 'excellent' or 'good'. Five percent of consumers and five percent of frontline workers rated them as 'acceptable'. The wide range of ability and confidence among consumers was evident, with some saying they were useful and others saying they would need more help to take the actions discussed at the presentation (which is why Energy Best Deal Extra has been developed; see p.45).

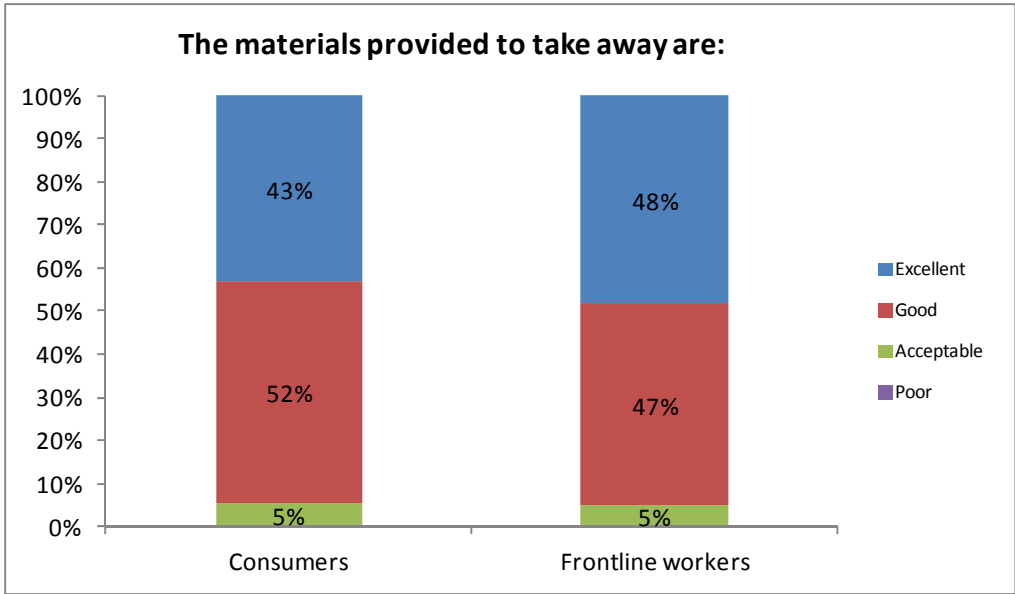


Figure 38: Ratings of the materials provided to take away.

2012/2013 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 2012/2013 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 interview took place an average of 14 months after the first interview and an average of 17 months after the session.

Looking for a better deal

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

- Ten had looked into getting a better deal. Of these:
 - Five had switched tariff or supplier (group A)
 - Five had looked into getting a better deal but did not end up switching (group B)
- Fifteen had not looked into getting a better deal (group C)

Group A

A year later, all five consumers who had switched are all still happy with that decision. However, two do not know if they saved money by switching, while three know that they have saved money. Those who saved money made annual savings of £50, £70, and 'a couple of hundred pounds'.

One of these five consumers (the one who had saved the most money) was in the process of changing tariff again. Three of the others had not checked prices again, while the fifth person had looked at other tariffs but decided to stay with the one she has. Three of the five consumers planned to check prices again in the future, while two did not plan to check again.

Group B

Of the five who had looked into getting a better deal but did not end up switching at the time of the first interview, four had since checked prices again. One of these had done so because they remembered something from the Energy Best Deal session, while the others had been prompted by another source. All four of these people contacted their existing supplier, while two also checked prices by using a comparison website and phoning suppliers. One ended up switching to a different supplier, and another switched to a new tariff with their existing supplier.

Group C

Of the fifteen people who had not looked into getting a better deal at the time of the first interview, eleven had not done anything further since then to look for a better deal on their energy. Four people had done something; for two of them it was because their fixed deal was coming to an end, while one person was prompted by Energy Week at CAB, and the fourth person heard something from another source that prompted him to take action. All four of them contacted their existing supplier *and* checked prices from other suppliers. Most used a price comparison website but one had further help from an advisor at CAB. Two switched to a different tariff with the same supplier and two switched to a new supplier. All of these people it 'fairly easy' or 'very easy' to work out if

they would save money by switching. However, one of the people who switched to a new supplier found the process difficult.

Payment method

Last time we spoke to this group of 25 consumers, four had changed their payment method as a result of the Energy Best Deal session, and they were all still happy with that decision. The remaining 21 people had not changed their payment method between the session and the first interview, and had still not changed payment method. Eighteen of these believed they were already using the best payment method, while two were on fixed tariffs and so had not looked into changing payment method, and one person said they did not want to change.

Other actions

At the time of the previous interview, nine of the 25 interviews had taken other actions, such as applying for the Warm Home Discount, since the session. Since then, two had received the Warm Home Discount, but one other was ineligible. Two people were investigating benefits, although one person had found out that their income was too high for benefits. One person had received a boiler upgrade organised by their Housing Association, and another had had their loft insulation topped up.

Overall comments

Other comments that this group of interviewees had, more than a year after the session, included:

- One person had reduced his direct debit and found that he could make his house warmer in the winter. He attributed these outcomes directly to the Energy Best Deal session.
- One person said that she found the session very useful and has become much more aware of saving energy.
- Another person said that the session had made him more aware of his energy consumption.
- Another person said that the session definitely gave her the help she needed.
- One person said that the session was very good because it gave her the option to ask questions, hear other people's questions, and it had made switching less scary.

2012/2013 participant interviews – frontline workers

Twenty five frontline workers who attended the Energy Best Deal sessions in 2012/13 were contacted by telephone, an average of 16 months after they attended a session. They were first asked what they remembered most clearly from the Energy Best Deal session. The answers given were:

- That it's possible to change energy supplier with greater levels of debt than the frontline worker previously thought (2 people).
- Where to go for debt advice (1 person).
- Information about switching - how to do it, the need to check regularly, tariffs and standing charges, ease of switching supplier, different ways to find the best deal, the variety of energy suppliers available, how to check what your tariff is on your energy bill (11 people).
- That the presentation gave lots of good new information (1 person).
- That there is aid available for a lot of people who need it (1 person).
- How cold damp homes affect health, e.g. asthma (1 person).
- How energy is lost in the home: for example, how much is lost through the walls compared to the windows (1 person).

In addition, six people could not remember much about the session and one person's main memory of the session was that there were language difficulties as the presenter's first language was not English.

Interviewees were asked if there was anything in particular they learnt at the session that has been useful to them in their work since the session. Responses were:

- Information about finding a better deal on energy supply (10 people)
- Information about energy efficiency (4 people)
- Everything (3 people)
- Information about switching energy supplier with a debt (2 people)
- Information about debt and money management (2 people)
- Information about changing payment method (1 person)
- Information about the Warm Home Discount (1 person)
- The literature provided (1 person)
- How to check bills (1 person)
- Identification of needs via assessments (1 person)
- Dealing with damp homes (1 person)
- Information on the Green Deal (1 person)

In addition, 3 interviewees could not remember enough about the session to give an answer here, while one person said that the session was not directly relevant to her job, as she is a manager but does not give advice herself. She attended the training so that she knew what advice was being given by the people that she manages. In addition one person said she was no longer a frontline worker.

Twenty-two interviewees said that the session had given them more confidence in dealing with topics that they were already advising on. Three people said it did not, with one of these saying that the message they had received from the presentation had been a bit confused.

Sixteen people said the presentation enabled them to help clients with issues which they were not advising on previously, while nine said it did not. New issues the presentation helped them with were:

- Switching and how to get the best deal (3 people)
- Giving real-world examples on energy efficiency (1 person)
- Signposting clients, for example to energy efficiency programmes (1 person)
- Information on cavity wall insulation (1 person)

One person also commented that the presentation had helped them with new information at the time but now government programmes have changed the information is out of date.

Seventeen people said they have continued to use information from the presentation. Seven people said they had not, and one person said they might use the information but cannot be sure that the information was sourced from the Energy Best Deal presentation.

Of those that are continuing to use information from the presentation, four people are using it more frequently than they did following the session, six people are using it less frequently, and six people are using it with about the same frequency. One other person is still using it but she said that it was now not as fresh in her mind and so she found it harder to use than she did immediately following the session.

Interviewees were asked to give the most common energy-related issue that their clients had encountered since the session. Responses were:

- Debt (5 people)
- Getting gas meters removed (that is, dealing with disconnection) (1 person)
- How to use less energy (2 people)
- High energy cost, bills not affordable (8 people, with 1 of these specifically linking affordability to changes in the benefits system)
- Managing key meters (1 person)
- Understanding bills (1 person)
- Switching suppliers (2 people)
- Dealing with shared bills (1 person)
- Grant / energy supplier funding (1 person)
- Damp homes (2 people)

One person commented that recently it has become more common for his clients to seek advice on water bill arrears than energy bills.

Interviewees were asked if their clients had sought help with any energy-related issue which were not covered in the presentation. Only one person gave an answer here, which was how to deal with gas disconnections.

Interviewees were asked to think about how they had used the information from the presentation since the session and in light of that think of any ways in which the presentation could be improved. Those who could think of improvements gave the following answers:

- Send out follow-up information emails to cover new developments
- More handouts and literature
- More information on the different schemes
- Information on time lines for getting things done. For example, how long should clients expect to have to wait following an application for funding or for heating or insulation measures?
- More examples (e.g. on how much energy different appliances use). These were found to be useful because they help to get points across to clients.

One person commented that the person delivering the session had not known much about renewables being used by the local council (such as district heating and air source heat pumps). However technical information on renewables is not a core part of the presentation and the presenter cannot really be expected to know about this.

In addition, one person commented that there should be more sessions. Another commented that the handouts were very good and helpful for clients. The interviewee was not sure if the handouts were standard or just provided by the presenter of the session she attended.

One interviewee commented that due to his role it would have been more helpful to him to have an overview of what help is available locally and nationally, rather than the more practical content of how to find the best deal, etc. Again this is not the focus on the Energy Best Deal session.

Frontline workers were asked to estimate the number of clients that they had provided information on Energy Best Deal topics to since the session. This is illustrated in Figure 39. The median estimate was 20. The highest number was 250, which the interviewee said was mostly through talking to clients at coffee mornings.

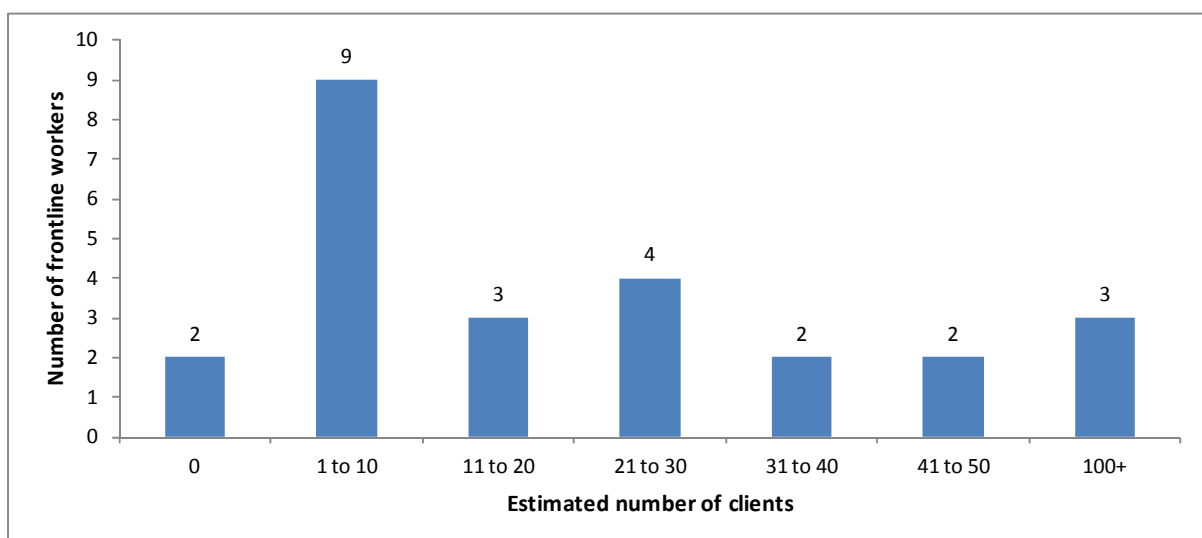


Figure 39: Estimated number of clients information has been provided to since 2012/13 session

Only two people said they had not passed on the information to anyone, but six people had said that they did not remember the session clearly. These six people also gave quite high estimates for the number of clients that information was passed on to, basing these estimates on the number of people they had talked to about energy rather than specifically thinking about Energy Best Deal topics, which they did not remember clearly. On average this represented around 25% of the clients the frontline workers had seen in that time. One interviewee who works for a housing association said that it is now their policy to give energy advice to all of their clients.

Twenty-one interviewees thought that they would continue to use information from the presentation in the future, while three thought that they would not and the remainder did not know.

When asked whether they thought they would benefit from a refresher session on the same topics, three people said no (one due to having a new job role), 14 said yes, four said probably or possibly, one said they would if there was new information, and the remainder were not sure.

Interviewees were also asked if they thought they would benefit from another session taking some of the Energy Best Deal topics into more detail. Eleven people said no, with two of these commenting that it was the right level of detail, one noting that with the contacts given in the booklet it is possible to find out more if required, and one saying that he had found additional information himself. Four people were not sure if they would benefit from a more in-depth session, and seven people said yes with one saying possibly. Topics that people specified were: energy consumption reduction, updates on government energy saving schemes, and more information on night storage heaters. One person said he would like more information on the bigger picture, in terms of policy and schemes, rather than practical advice for individuals.

One interviewee commented that the session was useful and she thought a lot of people would benefit from it. Another commented that the session was very relevant and he felt it was a good use of his time. One other commented that the sessions should be more regular, with a fourth person saying that the sessions should be available to more people.

Case studies

This section provides some brief case studies drawn from the interviews with consumers and frontline workers.

Successful switch following session

Ms A had a successful switching experience. She was approached by Npower to switch, and then checked with CAB about the deal before going ahead. She had previously had a negative experience of switching, but this time the process was seamless. Ms A did not have to contact her suppliers at all, she was given a refund without question on excess direct debit payments and all communication was very straightforward and done by email. She has saved more than £70 a year on her bills.

Confidence to research tariffs

Mr B receives a war pension, and is disabled, suffering from arthritis and an old spinal injury. He feels the cold, and the damp cold weather over the winter aggravates his condition. Attending the Energy Best Deal event gave him and his wife the confidence to find out about alternative energy tariffs. He had already started thinking about changing tariff, and the training showed him that he was on the right track. He switched to a fixed rate tariff until October 2014 with his existing supplier and will save £110 per year.

Fuel bills cut

Ms C lives in an 1890's home with solid walls. She found the Energy Best Deal session very useful in helping to cut her fuel bills, so much so that her direct debit has been reduced from £200 a month to £150. She also found out about the Warm Home Discount and Priority Services Register from her fuel supplier. The house used to be "colder than the fridge", but things are improving.

Warm Home Discount information passed on

Ms D applied for the Warm Home Discount following the session, and although her application was not successful, she told four friends about it, and two of them made successful applications.

Cheaper tariff and energy monitor

Following the session, Ms E called her supplier, who offered her a better deal after she mentioned that she was considering switching. She was pleased to find a cheaper tariff from her current supplier but then began to feel that the company was not very trustworthy because they did not offer the lower tariff but waited until she asked. During the discussion with her energy company Ms E was offered an energy monitor. This helped her find out which appliances in her home were using the most electricity. Ms E also passed a leaflet from the session to a colleague, who looked into her own energy tariffs.

Improved heating control 1

After attending the session, Mr F started using his heating system programmer to make his heating come on at set times instead of leaving it on all the time. As a result his monthly gas direct debit payment reduced from £93 down to £68 (a 27% reduction).

Improved heating control 2

At the session, Ms G learned about reducing night time heating by using her programmer to turn the heating on before she gets up. As a result, she saw large savings in her oil bills.

Switch using comparison site

Following the session Ms H used a comparison website and switched to a tariff with a different energy provider. As a result she expects to save more than £200 per year.

Better tariff and rebate

Frontline worker A has a client with Multiple Sclerosis who is on benefits, has debt, and suffers from concentration and memory problems. She approached the CAB because she was being chased for a debt. The frontline worker completed a financial statement with the client. Using what she had learnt from the Energy Best Deal session, she realised that the client's energy use was high, although she was unsure whether this was due to the client having a disability. They discussed reducing energy consumption but the client is a private tenant so it is difficult for her to get energy saving measures installed. The frontline worker suggested contacting the supplier to make sure she was on the right tariff. The client found a better tariff, saving around £60 per month, and also discovered that she was in credit on her energy bill and was given a rebate by the supplier.

Frontline worker's own bills

After the session, frontline worker B realised that her energy supplier had not billed her properly and they also had not made the appropriate change from when she had switched tariff. The session therefore helped her with her own bills as well as helping her to advise clients.

Energy Best Deal Extra

Citizens Advice obtained funding for 99 Bureaux to provide one-to-one follow-up advice appointments, called 'Energy Best Deal Extra' (EBDx). 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 October 2013 to April 2014. In total 4,318 one-to-one advice appointments took place. Of these, 46% were 'warm contacts' who had come to the EBDx appointment via Energy Best Deal group sessions held by the CAB, via a Financial Capability group learning session held by the CAB, or as a result of a recommendation by someone else who had attended an Energy Best Deal session. Fourteen per cent had come via Energy Best Deal group sessions, while 27% had been referred to EBDx by someone who had attended an Energy Best Deal session and 5% had attended a Financial Capability group session.

In order to evaluate the impact of the Energy Best Deal Extra advice appointments, 52 telephone interviews were undertaken with people who had attended an EBDx advice appointment (the target number was 50). The advice appointments could cover a wide variety of topics and situations and so the telephone interviews used very open questions in order to capture this.

Forty-eight interviewees (92%) said they found the advice appointments helpful, with 27 making comments which indicated that it had been a particularly positive experience.

"All good for me. I did not realise being on Job Seekers Allowance for 6 months that I may be eligible for the Warm Home Discount. I applied online and got it. £135 is a lot of money - I would not have known about that. Checked on switching, but I'm happy with my supplier. Very good outcome and delighted."

"I've recommended lots of people to CAB, they've been so good to me, I'd come back to you if I ever needed to."

The majority of the advice appointments covered switching energy supplier, and other support offered included benefits checks, debt advice, Warm Home Discount applications, and energy efficiency. Five interviewees gave specific examples of how they were reducing energy waste in their homes since the advice appointments.

Figure 40 shows the count of topics covered in the advice appointments.

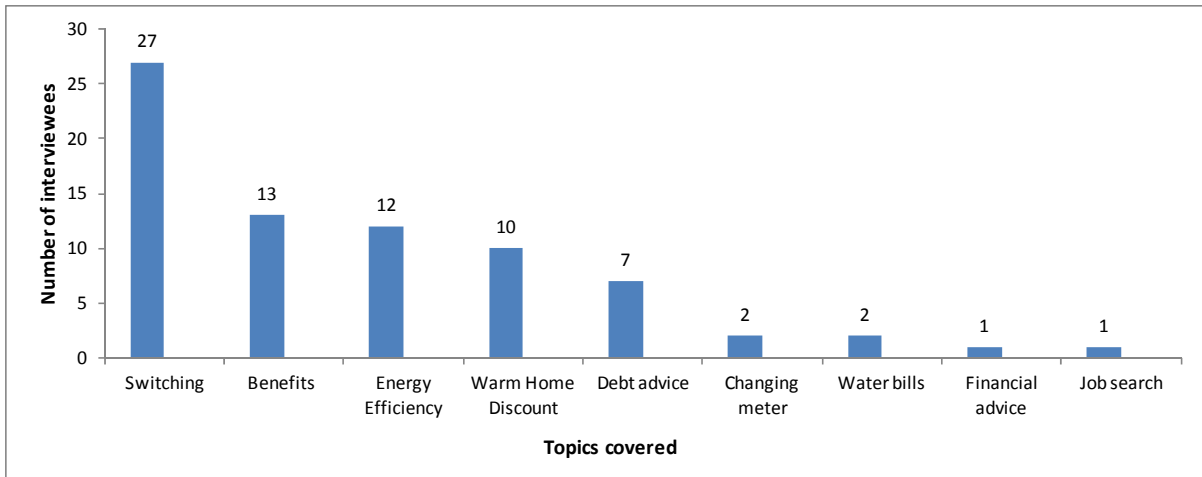


Figure 40: Topics covered in the EBDx advice appointments

Twelve people switched supplier or tariff as a result of the advice appointment, and two people switched from prepayment meters to credit meters. Six people received the Warm Home Discount as a result of the EBDx advice appointment, with one other person waiting to hear about their application and another about to apply.

There was evidence in the interview responses that the multifaceted approach offered by CAB through Energy Best Deal Extra in terms of support regarding benefits, debt advice, switching, and energy efficiency was a successful and much appreciated strategy. The signposting to additional help and resources was of significant benefit to some consumers. This included resources such as electrical appliances courtesy of energy companies, or in calling landlords about essentials like cookers.

The service offered by CAB advisors in supporting clients with limited or no internet access was also apparent. Frequently it was not simply a lack of computer access that was a problem, but that clients found comparison websites confusing and were not confident using them. This was partly due to the fact that the various comparison websites give differing results. One interviewee said that he felt that as advisors have more experience he preferred that they compare tariffs on his behalf.

The advice appointments helped some clients to become more confident in dealing with suppliers and comparison services. Two felt that after discussion with an advisor they could contact suppliers and use comparison phone services themselves. Although not all clients switched supplier after comparing tariffs if the financial benefits were minimal, they felt reassured after having checked prices. Some clients were locked into fixed term tariffs but said that they would recheck the comparison sites when their contracts were coming to an end.

Also of note was an appreciation of the empathetic approach of advisors.

"I'm saving around £150 a year on fuel bills. I could not thank the advisor enough, she was very helpful. I've recently been bereaved as well so she was very sympathetic to me."

One interviewee who is partially deaf was extremely grateful for the help she received. The conversation facilitated by the advisor with the supplier had been put on loud speaker so the client could hear it. The client said that she was somewhat daunted about talking to suppliers especially having a hearing impairment, as she found it difficult to talk on the phone. She said that the EBDx

advice appointment was an important service for people who are hard of hearing. She thought EBDx was an excellent service, and could not think how to improve it.

In various ways many people expressed a sense of frustration in their dealings with utility companies, or a sense of relief in being able to access additional resources. This 'stress reduction' undercurrent of advice work may have health impacts that are difficult to trace, but are worth noting, especially where people are under a great deal of stress due to debt, unemployment, ill health or other issues. For example one interviewee, who was on benefits, said that the previous occupant of his property had left a huge debt for gas and other utilities. In the advice appointment the advisor had helped him to apply for the Warm Home Discount, and it seemed that the good news of the application being approved had helped him to have a more positive attitude to these worries.

Other ways in which people were helped in the EBDx advice appointment were:

- A client who had severe energy debt was helped to apply for working tax credit and for a grant through Charis Trust Fund. They are awaiting the outcome of the application.
- The client was helped to apply for the Warm Home Discount (the application was successful). The advisor also gave her advice on managing her home energy use.
- Following an in-depth discussion with the advisor about changing energy supplier, the client is more confident about contacting the supplier and using a comparison phone service.
- The advisor contacted the supplier to find out the client's exact energy usage (this would have been estimates made by the supplier based on the most recent readings, but would be the most accurate information available) and used it to look on comparison sites (the interviewee noted that different comparison sites gave different results, which was confusing). The client then used this information at home to contact suppliers to find the best deal.
- The advisor helped the client to switch supplier, saving £230 per year. The advisor also referred the client to a third party organisation who did an energy survey of the client's home.
- The advisor helped the client, who is partially sighted, to have a safety check of her home, as a result of which hand rails and a smoke alarm have been fitted.
- The client had found out from the Energy Best Deal group session that she would be eligible for the Warm Home Discount because of the benefits she receives. However when she phoned her supplier they told her she was not eligible. At the EBDx advice appointment the advisor phoned DWP to confirm which benefits the client receives, and using this information found out which suppliers would give her Warm Home Discount. As a result she switched supplier and received the Warm Home Discount, plus a lower energy tariff.
- The advisor assisted the client to change energy supplier, reducing his monthly bill from £60 to £36 per month. He was in credit with his previous supplier, and the credit has been refunded promptly.
- The client found the advisor to be very thorough. The advisor helped the client to obtain the Warm Home Discount, and also saved £150 a year on his fuel bills. The advisor also arranged for an energy auditor from SWALEC to visit his home, produce an EPC and give him energy saving tips.
- The advisor did a comparison and assisted the client in switching supplier, saving the client £230 a year. They also contacted a local organisation to do an energy survey. As a result the

client has installed LED lighting. The advisor checked on social tariffs for water, which were of interest as an ill elderly relative lives in the home. The client also found out about white goods and discounts available for those on low income from energy companies. The client was very happy with the help received.

- The advisor helped the client to switch from Job Seekers Allowance to Employment and Support Allowance, and also helped to get her landlord to agree to switch from a prepayment meter to a credit meter for gas.

One person we spoke to had attended an Energy Best Deal group session in a different London borough to the one where she lived, but had been given the phone number of her local CAB so that she could organise an EBDx advice appointment. However she had not managed to make an appointment. The client appeared to be quite vulnerable and should have been able to attend an advice appointment in the same CAB as where she attended the session, or referred directly without having to phone to make an appointment afterwards; unfortunately in this case this client slipped through the net.

Four of the 52 people interviewed said that they did not find the EBDx advice appointments helpful. One person said that this was because the advisor seemed to be new to the job and had to repeatedly check details with other advisors; the client's problems were quite complex. Two people said they were not helped to look on comparison websites, which was what they wanted help with - one of these people also said the advisor seemed to be new. The fourth person said that she received a home visit but that the advice given at the visit was not very useful. However, the home visit would have been a referral to a third party and so the quality of this advice is somewhat outside the control of the Bureau.

One person found the advice appointment useful because the advisor had phoned the supplier with a meter reading and asked for an updated bill; they had been let down by the supplier because the supplier had not provided an updated bill after several months.

Summary and conclusions

Consumers: 2013/2014 sessions

Consumers were asked to complete a questionnaire following the session, and responses were received from 6,086 people, 59% of all consumers who attended sessions.

Just over half (53%) of questionnaire respondents were aged 60 or over, and 47% of respondents were retired. Thirty-eight percent of respondents said they were not able to heat their home to a comfortable level in winter. Twenty-one percent found their winter fuel bills to be a financial strain or impossible to manage. A further 57% said that they worried or were concerned about winter fuel bills, even though they were able to manage them without skimping on other important household bills, meaning that 79% of respondents had worries about their fuel bills.

Eighty-nine percent of respondents already knew that it was possible to switch supplier before the session, and 50% had switched supplier in the past. Nearly three-quarters of those who had switched supplier in the past were proactive switchers, having switched on their own initiative to get a better deal, while just over a quarter of those who had switched in the past were reactive switchers, switching in response to an approach from a fuel company salesperson.

Ninety-seven percent of those who answered the question said that they found the session useful. Information about how to find the best deal was found to be useful by the largest proportion of respondents, followed by information about how to switch, information about dealing with energy suppliers and information about energy efficiency.

Seventy-five percent of respondents said they would probably or definitely do something as a result of the session, with the most popular planned actions being related to finding a better tariff, and telling other people what they had learnt at the session. Twenty percent of respondents planned to find out more about saving energy at home, 18% planned to apply for the Warm Home Discount, and 16% planned to ask to be placed on the Priority Services Register.

Follow up interviews took place with 150 consumers who had returned questionnaires, an average of three months after the session. Interviewees were asked about different actions that they may have taken following the session. Seventy-five percent had taken at least one kind of action following the session, and sixty-three percent had told friends and family about something they had learnt at the session.

Thirty-five percent of interviewees (53 people) had looked for a better energy tariff following the session. Seventeen of the people who looked for a better tariff had never switched supplier before. Of the 53 people who looked for a better tariff, 28 were offered a better deal, and 27 had switched or planned to switch tariff or supplier, with the majority choosing a different tariff with the same supplier. The average expected saving across those who had switched was £150 per year, although only 14 people were able to estimate how much they would save.

Of those who did not look for a better deal, the most common reasons were that they were happy with their current tariff (12 people), that they had not had time (11 people) or that they were currently on a fixed tariff (7 people).

Five people had changed payment method since the session, and one person was waiting for a prepayment meter to be installed, making a total 4% of interviewees changing payment method.

Twenty-eight people (17%) had looked for more information on improving their home energy efficiency or heating system as a result of the Energy Best Deal session. Forty-eight percent of interviewees had taken steps to save energy in their homes since the session; the majority had taken no-cost actions such as switching off appliances and adjusting the heating controls.

Interviewees were asked some basic questions about the benefits that they receive, and based on this it is estimated that 10% of interviewees are likely to qualify for the ECO funding for heating measures.

Twenty people (13%) had applied for the Warm Home Discount since the session.

Sixty-three percent of interviewees had passed on something they had learnt at the session to friends and family. This is a higher percentage than that estimated by consumer questionnaire respondents (28%).

Frontline workers: 2013/2014 sessions

Frontline workers were asked to complete a questionnaire following the session, and responses were received from 3,337 people, 62% of all frontline workers who attended sessions. The largest proportion of frontline workers were from Citizens Advice Bureaux (33%).

Eighty-one percent of frontline workers said that the session had changed their opinion of the importance of fuel poverty to their clients. Fifty-two percent of frontline workers estimated that 60% or more of their clients were in fuel poverty.

Ninety-seven percent of frontline workers said they felt more confident on advising on specific topics as a result of the session. The most common topic that frontline workers felt more confident about was 'finding the best deal on energy costs' (89%) followed by 'different payment methods' (83%) and 'energy efficiency' (72%). Some frontline workers also felt less confident about giving advice on some topics, particularly the Green Deal (3%) and the Energy Company Obligation (2.9%), due to the complexity of these relatively new topics, and also in the case of the Green Deal because some frontline workers did not want to advise their clients on a scheme which involves taking out a loan, and in some cases because they did not think it was a good scheme. Generally across all topics, a very low percentage of frontline workers said that they felt less confident following the session, and in many cases this was because giving advice was not part of their job role.

Follow up interviews took place with 150 frontline workers who had returned questionnaires, an average of three months after the session. Interviewees were asked to rate their level of knowledge of specific topics before and after the session. Overall knowledge on all topics had increased as a result of the session, with the greatest increase occurring in 'grants for insulation and heating' and 'finding the best deal on energy and dealing with suppliers'.

When asked if any part of the presentation was particularly useful in helping them do their job, 48 people (32%) said all of the presentation was useful, 36 (24%) people said that information on finding a better deal on energy supply was most useful, and 18 people (12%) said that information about energy efficiency was most useful.

The majority of interviewees thought that the session helped them to a great extent in terms of providing more accurate or detailed advice, expanding the range of help and advice that they were able to give to clients, and having more confidence in dealing with energy-related topics. However, 9% found that the session did not increase their knowledge of topics that they were already advising on and 11% found that the session did not give them knowledge of new topics that they were not previously advising on.

Since the session, information from the presentation had been provided to 4,750 clients across all frontline workers (some frontline workers had reached large numbers of clients via speaking to people at events and by passing the information on to colleagues who were managed by the interviewee, who then used this information to help their clients). The median number of clients reached per frontline worker was thirteen.

Sixty-one percent of interviewees said they would not have provided as much information to clients without attending the session.

Forty-nine percent of interviewees had passed on information from the presentation to their colleagues, while 23% said they could not do this because all of their colleagues were also at the presentation.

Quality of the presentation and materials: 2013/2014 sessions

Fifty-six percent of consumers and 57% of frontline workers rated the presentation skills of the trainer as excellent with most of the remainder rating them as good. Consumer interviewees were full of praise for the presenters of their session, with comments such as 'brilliant, very approachable', 'engaging', 'very supportive', 'very helpful', 'very clear', 'informed', 'thorough' and 'very good listener'.

The majority of consumers (55%) and the majority of frontline workers (51%) rated the materials used during the session as good, with 38% of consumers and 43% of frontline workers rating them as excellent.

The majority of consumer attendees rated the materials provided to take away as good, with most others rating them as excellent. Almost equal numbers of frontline workers rated the materials as either excellent or good.

Consumers: 2012/2013 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 2012/2013 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 interview took place an average of 14 months after the first interview and an average of 17 months after the session.

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

- Ten had looked into getting a better deal. Of these:
 - Five had switched tariff or supplier (group A)
 - Five had looked into getting a better deal but did not end up switching (group B)

- Fifteen had not looked into getting a better deal (group C)

A year later, all five consumers who had switched (group A) are all still happy with that decision. One of these five consumers (the one who had saved the most money) was in the process of changing tariff again.

Of the five who had looked into getting a better deal but did not end up switching at the time of the first interview (group B), four had since checked prices again. One ended up switching to a different supplier, and another switched to a new tariff with their existing supplier.

Of the fifteen people who had not looked into getting a better deal at the time of the first interview (group C), eleven had not done anything further since then to look for a better deal on their energy. Four people did take action; for two of them it was because their fixed deal was coming to an end, while one person was prompted by Energy Week at CAB, and the fourth person heard something from another source that prompted him to take action.

At the time of the previous interview, nine of the 25 interviewees had taken other actions, such as applying for the Warm Home Discount, since the session. Since then, two had received the Warm Home Discount, but one was ineligible. Two people were investigating benefits, although one person had found out that their income was too high for benefits. One person had received a boiler upgrade organised by their Housing Association, and another had had their loft insulation topped up.

Frontline workers: 2012/2013 sessions

Twenty-five frontline workers who attended sessions in 2012/13 were contacted by telephone for a follow-up interview, an average of 16 months after attending a session. When asked what they remembered most clearly from the session, eleven people said information about switching, two people said they remembered learning that it's possible to change supplier with a higher level of debt than they thought, and a variety of other topics were mentioned, such as the fact that cold, damp homes can affect health, and ways that energy is lost in the home. Six people could not remember the Energy Best Deal session clearly.

When asked if there was anything they learnt at the session that had been particularly useful to them since the session, ten people said information about getting a better deal on their energy supply, four people said information about energy efficiency, and other answers included how to check bills, information about the Warm Home Discount, and dealing with damp homes.

Twenty-two interviewees said that the presentation had given them more confidence in dealing with topics which they were already advising on, while sixteen said it had enabled them to help clients with issues which they were not previously advising on. Seventeen people said they had continued to use the information from the presentation in their work.

Interviewees were also asked if they thought they would benefit from another session taking some of the Energy Best Deal topics into more detail. Eleven people said no, with two people commenting that it was the right level of detail, one noting that with the contacts given in the booklet it is possible to find out more if required, and another saying that he had found additional information himself.

Four people were not sure, and seven people said yes with one saying possibly. Topics that people specified were: energy consumption reduction, updates on government energy saving schemes, and more information on night storage heaters. One person said he would like more information on the bigger picture, in terms of policy and schemes, rather than practical advice for individuals.

One interviewee commented that the session was useful and she thought a lot of people would benefit from it. Another commented that the session was very relevant and he felt it was a good use of his time.

Energy Best Deal Extra

Fifty-two people who attended Energy Best Deal Extra advice appointments were interviewed by telephone. In the appointments they had been given advice and help on switching (27 people), benefits (13 people), energy efficiency (12 people), Warm Home Discount (10 people), debt (7 people), changing their meter (2 people), water bills (2 people), money management (1 person) and job search (1 person). Many received advice on more than one topic.

Forty-eight interviewees said that they found the advice appointment helpful. Twelve people switched supplier or tariff as a result of the advice appointment, and two people switched from prepayment meters to credit meters. Six people received the Warm Home Discount as a result of the EBDx advice appointment, with one other person waiting to hear about their application and another about to apply.

Conclusions

A large majority of consumers and frontline workers found the sessions useful. There was a large amount of praise for the presenters, particularly from consumers.

Follow up interviews with consumers found that 75% had taken at least one action and more than half (63%) had told friends and family about something they learned at the session. Eighteen percent of interviewees switched or were about to switch as a result of the session. As well as the more tangible results of the session, comments show that in general consumers felt that it was helpful to have better knowledge of what actions and routes were available, what their rights were, and what help was available, even if they did not take action directly following the presentation.

Finding out about the Warm Home Discount was notably something that people benefited from in the session, with eighteen percent of consumer questionnaire respondents intending to find out about this following the session, and twenty interviewees (13%) applying for it. The Energy Best Deal Extra one to one advice appointments also helped ten out of 52 interviewees (19%) with applying for the Warm Home Discount.

Digital inclusion is an issue for consumers in the energy market. Sixty-one percent of people who checked prices from a different supplier used a website. Older people can be put off looking for better deals if they are not comfortable with using a computer. This is something that Energy Best Deal Extra advice appointments are helping with. Two other common issues when dealing with suppliers is that those who are hard of hearing find it difficult to talk to the supplier over the phone, and for many people of all ages, contacting the supplier when you only have a pay-as-you-go mobile phone is unaffordable, especially when having to wait in a queue to speak to someone.

Questionnaire and interviewee comments showed that the session had made people more aware of the easy steps they could do to reduce energy consumption and / or make their homes warmer. Some attendees had also taken larger steps to save energy (or to make their home warmer), including nine people (6% of consumer interviewees) who applied for free or discounted insulation or heating measures from various sources. Ten percent of interviewees were likely to qualify for HHCRO, based on the questions we asked them about their benefits. Several frontline workers said they would be reluctant to advise clients to take up Green Deal.

Few people changed payment method and most people thought that the way they paid was best for them. Direct debit may be cheaper but many prefer to pay when the bill comes or use prepayment meters as they feel more in control of their expenditure that way. However it is still important that the presentation makes people aware that different payment methods can have different costs.

Frontline workers' increases in confidence across all topics were large. In general most frontline workers interviewed felt that the Energy Best Deal topics were very relevant to their job roles and most felt that the session helped them to provide better advice and information on the topics covered.

As frontline workers came from a variety of different backgrounds, there was quite a lot of variation in the level of detail frontline workers preferred. Therefore one potential addition to Energy Best Deal could be either a set of handouts which signpost to more detailed information on certain topics, which are available to those who want them, or a web resource which can be updated as and when needed.

Follow up interviews with consumers who attended sessions in the previous programme (2012/13) showed some ongoing impact, for example in terms of being aware of energy use and making switching less scary. Follow up interviews with frontline workers who attended sessions in the previous programme found that the majority thought they would benefit from a refresher session while seven people said they would benefit from a session taking some of the Energy Best Deal topics into more detail.

The evaluation of the Energy Best Deal Extra work found that people who had attended an advice appointment were helped in a variety of different ways according to their needs and several were helped to do things following up from the main Energy Best Deal session, for example applying for the Warm Home Discount. It is therefore a very useful complement to the main Energy Best Deal programme.