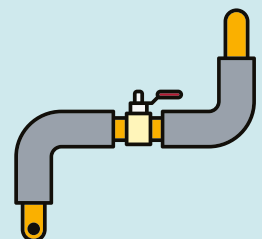
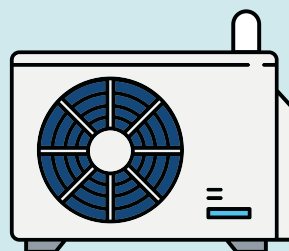
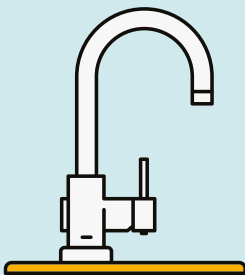
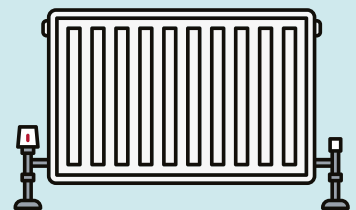
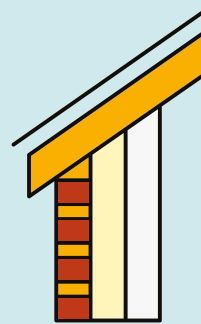
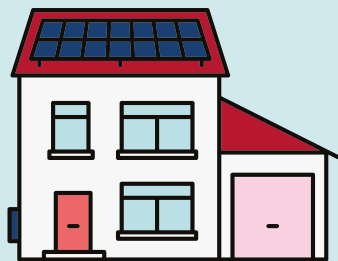
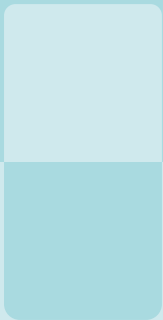


Home Energy Advice North East

LEAD Best Practice Guide

Overcoming barriers: hard-to-reach clients



Introduction

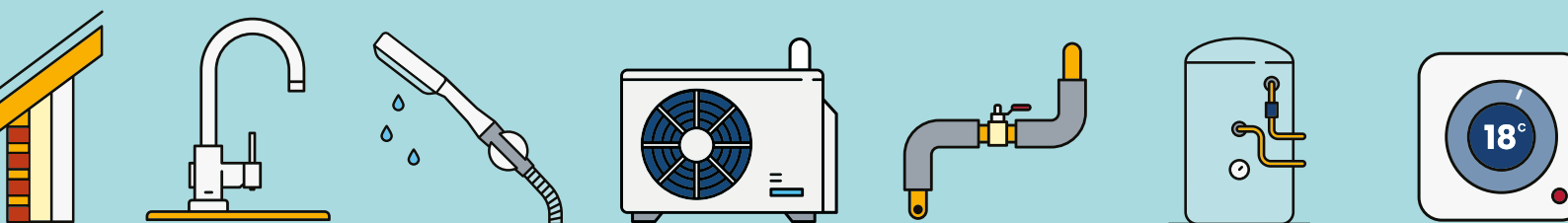
Domestic retrofit is a strategic priority for the North East region and the North East councils have a long history of delivering practical programmes to help people reduce heating and energy use in their homes. This includes supporting residents with energy efficiency and affordability through fuel debt advice, income maximisation of benefits and switching energy tariff.

Although the North East has been one of the most active regions in delivering home energy efficiency measures, it has some of the highest fuel poverty levels in the country due to income levels and remaining poor quality buildings. In the North East **as many as 220,000 households are estimated to be fuel poor** (Gov, 2023).

Scaling up domestic retrofit is a huge economic development opportunity for the North East but residents face multiple barriers including high upfront capital costs, slow return on investment, lack of knowledge, lack of trusted installers or advice and disruption to their homes.

Following a successful allocation of funding from the national Local Energy Advice Demonstrator (LEAD) programme run by the Department for Energy Security and Net Zero (DESNZ) in January 2024, the **North East Combined Authority (North East CA)** appointed Energy Saving Trust to deliver its LEAD project, with **Groundwork North East and Cumbria** and **Community Action Northumberland** as local delivery partners.

North East CA's LEAD project has been delivered alongside a One Stop Shop telephone and web advice service funded through the UK Shared Prosperity Fund; both projects are delivered under the overarching brand Home Energy Advice North East.



Objectives

The overarching objective of the LEAD programme is to trial different approaches to in-person energy advice, using learnings to inform the development of an approach to energy advice provision that could be replicated nationally.

The programme is focused specifically on targeting hard-to-treat properties and/or hard-to-reach residents.

North East CA's LEAD offer includes:

- Free and impartial advice on energy saving home improvements, delivered in the home
- A property report detailing energy saving recommendations, accessible through a QR code
- Face-to-face advice provided at community events

Implementation

Referrals into the service have been generated through a multi-channel marketing campaign, from partners and through advisors at community events.

Clients are offered a home visit in which they receive detailed personalised advice and a free property report with recommended actions. Energy advisors, trained to at least Level 2 in domestic retrofit, provide tailored advice based on home assessments and occupant needs. Ahead of the visit, they review EPC data (if available) and discuss client priorities.

During the visit, advisors inspect key areas such as heating, insulation, and windows, using a questionnaire to guide discussions. Clients receive information on energy use, available services, and potential retrofit options, including funding and grants.

Advisors may assist with grant applications on-site or provide cost estimates via Homewise – a digital advice tool that provides personalised energy efficiency recommendations for homeowners. After the visit, advisors follow up with resources and a check-in call to offer further support.

Common challenges and solutions

Challenge 1: Lack of knowledge/awareness surrounding retrofit measures

Many homeowners in the North East may not be aware of the range of assistance and funding options available to them to improve the energy efficiency of their homes and reduce their energy bills.

Below is an example of a Gateshead resident who was unaware of local support services and faced additional medical challenges, making it difficult to access the assistance needed to create a warmer, more energy-efficient home.

Case study

An isolated Gateshead client

Background

A homeowner sought support for a broken boiler, which was critical for her husband's return from hospital following heart-related tests. Both individuals had multiple health conditions, making a warm home essential for their well-being. Additionally, the customer expressed feelings of isolation as an Indian woman living in an area with no other Indian families, highlighting the need for social as well as financial support.

Action taken

The advisor referred the client to the Local Energy Advice Partnership (LEAP) scheme, which provided a boiler replacement and new radiators. Green Doctor further supported the household with radiator reflector panels and energy-saving LED lightbulbs to enhance energy efficiency.

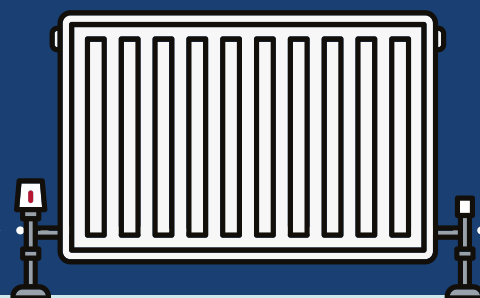
Recognising the client's financial challenges and social isolation, the advisor provided information and referrals for benefit and income maximisation advice, debt support, the Local Authority Household Support Fund, and a food bank. The client was also connected with a local voluntary and community sector (VCS) organisation to access culturally appropriate community support.

Outcome

The intervention ensured the household received essential heating improvements, creating a safe and warm environment for the customer's husband upon his return from hospital. The advisor also provided the client with smaller measures including LED bulbs and radiator reflector panels as well as general energy saving tips and advice.

In addition, financial and community-based referrals provided the client with much-needed support, helping to reduce isolation and improve overall well-being. This case highlights the importance of addressing both practical and emotional needs when supporting hard-to-reach households.

These additional client needs may not have been identified or supported without the in-home advice.



Challenge 2: Mistrust and unwillingness to engage and change habits

Many residents remain disengaged from available support due to uncertainty about who they can trust. This lack of awareness and confidence can prevent them from accessing essential assistance for improving their homes and well-being.

To overcome this, we used targeted marketing campaigns including local radio, newspaper articles, leaflets and posters on community noticeboards, and other marketing strategies to raise awareness and inform residents about the service.

Additionally, partnering with trusted community leaders and organisations such as charities, GP surgeries and employers, helped build credibility and encouraged engagement and referrals into the service. Attending local events and using word-of-mouth ensures that information is shared directly with residents in a way that feels familiar and reliable.

Case study

Employee engagement

Background

A dedicated local energy advisor attended a Gateshead Department of Work and Pensions staff briefing as part of their Better Health at Work Award. The briefing raised awareness of home energy efficiency as well as promoting the availability of the LEAD home visit service. This proactive engagement led to several staff members requesting home visits.

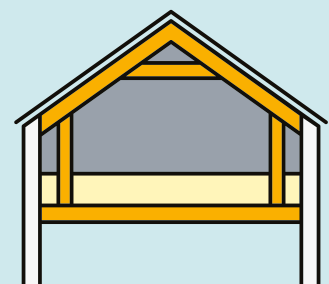
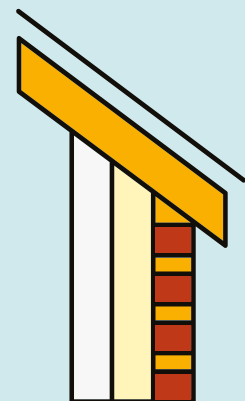
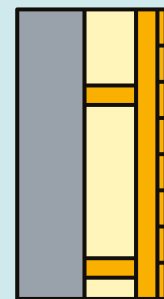
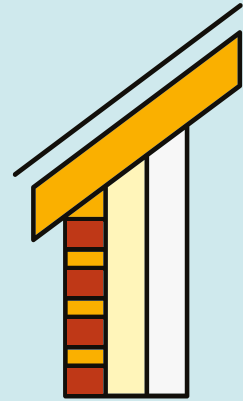
Action taken

During one home visit generated as a result of the engagement activity, the energy advisor identified the client's property lacked both cavity wall and loft insulation. Recognising that the resident's medical conditions qualified them for free insulation, the advisor provided direct support in applying for available funding.

Outcome

The grant funding application was successful, ensuring the home received essential insulation measures for both cavity wall and loft.

This case highlights the importance of workplace engagement in reaching those who may otherwise be unaware of their eligibility for funding for energy efficiency measures or for the additional support offered through in-home advice visits.



Conclusion

Energy advisors conducting in-home visits play a critical role in reaching vulnerable and hard-to-engage households, helping them improve energy efficiency and alleviate fuel poverty.

Many of these clients face significant barriers, such as digital exclusion, language barriers, or distrust of formal services, making in-person support essential. By providing tailored advice and practical solutions—such as identifying inadequate insulation, inefficient heating systems, or energy debt concerns—advisors can directly address the specific challenges faced by each household.

Building trust through personalised interactions is key to overcoming reluctance or lack of awareness about available support. Advisors can connect clients with relevant funding opportunities, emergency grants, and local resources, ensuring they receive the assistance they might not otherwise access.

Through ongoing engagement and collaboration with local authorities and community groups, energy advisors help to create lasting improvements in home comfort, affordability, and energy efficiency, while also contributing to broader environmental and social goals.



HM Government



north east & yorkshire
NET ZERO HUB

