

Introduction

Insights to help shape future domestic retrofit advice services, for use by communities and local authorities, drawing on learnings from the LEAD projects in the South West (2023-25)

What is retrofit?

Retrofit is any improvement works done to existing buildings that reduce their energy use or help switch to cleaner fuels, mainly through energy efficiency and renewable energy.

Why run a retrofit advice project?

The UK has one of the oldest and worse insulated housing stock in Europe ([CCC, 2024](#)), with 13% of households living in fuel poverty ([ONS, 2024](#)). Heating residential homes with solid and fossil fuels accounted for 13% of the UK's greenhouse gas emissions in 2023 ([DESNZ, 2025](#)). Less than half of homes in England had an Energy Performance Certificate (EPC) rating of C or above in 2024 ([ONS, 2024](#)), indicating that more action on homes is needed to meet net zero targets. We also need to increase the proportion of homes using heat pumps from 1% in 2024 to 10% by 2030 to keep on track with our targets for reducing emissions ([CCC, 2024](#)).

Retrofit is preferable to demolition and rebuild, because the embodied carbon in building materials used for retrofit is much lower than for new builds ([UKGBC, 2024](#)). Two thirds of existing properties are expected to still be standing in 2050, making retrofit essential to tackling poor housing stock ([BEIS and DCLG, 2016](#)).

Retrofit advice projects can provide trusted, impartial advice for homeowners on the best way to upgrade their home. This can include multi-stage support to help homeowners move through the retrofit process. By giving homeowners the information and motivation they need to act, we can help make homes warmer and healthier, with a lower climate impact.



About LEAD

LEAD is managed in the South West by South West Net Zero Hub (SWNZH) and funded by the Department for Energy Security and Net Zero (DESNZ). The programme is trialling innovative approaches to retrofit advice for hard-to-reach groups and hard-to-treat homes. Read more [here](#).

Retrofit choices are, for most households, influenced by their relationships with trusted personal networks and local experts ([Brown et al, 2025](#)). Local, trusted information is particularly effective when delivered in person and in context ([Wise et al, 2025](#)).

The LEAD programme has applied and tested these principles of trust and personal connection through multiple local projects. In most cases, community partners have worked closely with local authorities to give advice schemes credibility and visibility, and in some cases working directly with council experts to deliver specialist advice. This guide is intended to share our collective learning to help others design and deliver effective local retrofit advice.

Choosing your audience

Why you should target advice services at particular audiences, and how to approach this

Why target a specific audience?

Communities across England are varied and diverse, and this is no less true across the South West.

Different groups of people have different values, attitudes, behaviours and other characteristics. There is no one message, service or contact method that works for everyone, so by choosing to focus on a specific audience, you can make your project more effective ([ESD, 2023](#)).

Without targeting, your message may not resonate with or reach the appropriate audience.

Who to target?

If your objectives are to progress retrofit across a geographical area, you'll need to understand who lives there. Attitudes towards retrofitting can be closely associated with income, employment status, housing tenure and housing type ([ESD, 2023](#)), so gathering hyper local data can help you understand what approaches might work.

Local authorities often hold a wealth of data on local communities which can inform an approach, or you can try some of the suggested further resources.

Audience segmentation

There is existing research identifying different audiences that can help you with crafting your message and your choice of language.

As part of LEAD, the [Far South West Retrofit Consortium \(led by Plymouth Energy Community\)](#) commissioned a market segmentation report and messaging toolkit. Further resources have also been recommended by LEAD partners.

Further resources

SWNZH LEAD Webinar Series: [Innovations in domestic retrofit advice - Retrofit as a service](#) 22 Jan 2025 (0:44 to 16:47) (see [also full slides](#)).

[Office of National Statistics \(ONS\) local area mapping](#) is a free service allowing easy collation of Census 2021 data to output area level.

[ONS Nomis](#) website provides a full raft of free statistical data, which provides a helpful starting point for building models of engagement.

The Department for Levelling Up, Housing & Communities provides [free access to EPC data](#).

There are also fee-based datasets and mapping services, commonly using [Experian Mosaic](#) data, that can help you gain deeper insights, such as [CSE's mapping service](#) based on Climate Outreach's [Britain Talks Climate](#) work.

[Britain Talks Climate](#) is a well-regarded communications toolkit developed by Climate Outreach, which segments the British public based on values and concerns, and how this affects attitudes towards climate change. The toolkit includes guidance on messages, language and messengers for each group.

The [UK Green Building Council](#) commissioned a whole-house retrofit study providing valuable advice for engaging different audiences.

The [Audience Spectrum](#), created by The Audience Agency, is a free online tool based on cultural engagement, which can give insights around channels for reaching different groups.

Working in partnership

Why it matters, who to partner with and why, and tips on managing consortium working

Why partner?

Retrofit is a complex subject requiring significant skills, expertise and capacity. Partnerships can enable a more complete service, which can aid outcomes for households and create a more resilient project. When partners are also driven by a social purpose, this supports skills sharing and helps to develop the retrofit sector as a whole.

Community partners are valuable in providing impartiality, local knowledge, and a desire to solve more difficult scenarios so that no household is left behind. They are often best placed to apply for funding, due to eligibility or by having a more flexible remit and geography. Local authority partners can give projects higher profile, credibility and resources, including policy support and relevant in-house expertise, such as planning and conservation, as well as supporting more strategic development. Private sector partners bring in-depth expertise on systems and products, and can share community values.

Tips for forming a consortium

- ✓ Invest time early on to build relationships with potential partners, understanding their strengths.
- ✓ Use consortium bidding to bring hyperlocal expertise while unlocking access to larger funding pots.
- ✓ Partnerships should be complementary and fill gaps, based on skills and geography, and need a clear purpose, mandate and remit. Each partner needs a clear remit, and tasks can be devolved accordingly.
- ✓ Consider a shared project budget across the partnership, based on goals and outcomes rather than separated by organisation, to encourage collaboration and allow flexibility. Include budget for each partner to spend time on collaboration.

- ✓ Agree ways of working, such as reporting forms, upfront. This will reduce conflict and resources later.

Tips for successful delivery

- ✓ Plan for social connection between new partnership teams, to establish relationships.
- ✓ Consider adopting a flat management structure across the consortium. This can take more time to manage, but results in better agreement and more positive working relationships.
- ✓ Understand that project delivery staff often did not write the proposal, and allow time to clarify tasks.
- ✓ Use your consortium to make the work more effective and efficient, such as shared training, resources and marketing (where scale brings value).
- ✓ Consider a topic-based working group structure to share good practice (6-8 people per group).
- ✓ Make sure partners communicate regularly, frequently and clearly about their activities. Plan for some face-to-face meetings, and involve technical staff in shared discussions. Collaboration meetings need good facilitation, and should provide a safe space for discussion.
- ✓ Manage the chain of communication between funders and local partners. Information should flow well in both directions.

Further resources

SWNZH LEAD Webinar Series webinar (20 Nov 2024) [Innovations in domestic retrofit advice - Power in Partnerships: collaboration and consortiums](#) (see also [full slides](#)).

Designing a service

What to consider when setting up a retrofit project, including the customer journey

Designing a customer journey

A retrofit advice service may support households through the whole retrofit process, or it may focus on overcoming a particular barrier.

If you're planning to support **the whole retrofit process**, you need to consider each step of the journey, from initial engagement to installation. This is not a quick process, and is likely to require collaboration with others to be successful.

If you'll be supporting **a specific stage**, you need to consider how people will access or be referred to your advice, and what signposting, resources and other information you will give them for next steps.

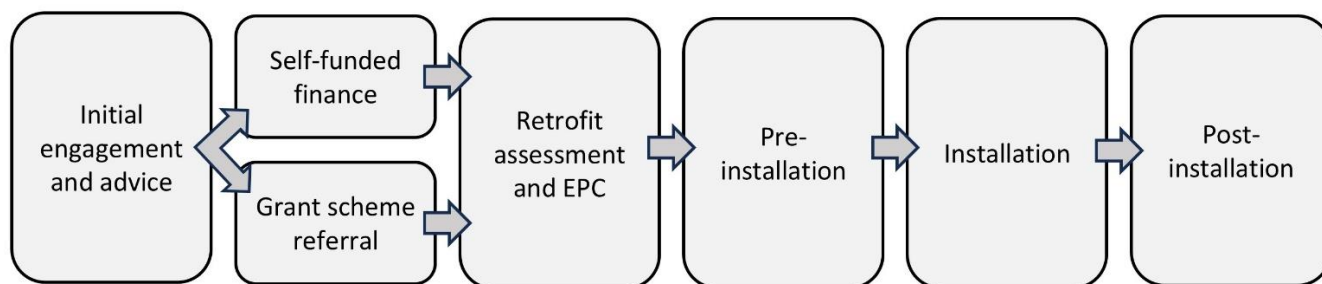
Audience in mind

It is critical to design services for your target audience. The barriers to retrofit, and the financial, practical and administrative capabilities and confidence of your audience, will all affect what support they need.

The design of a retrofit service for a self-funded vs grant-funded approach will be significantly different, and will have different barriers to uptake.

Key questions to ask:

- Will retrofit be self-funded, or is the householder eligible for grant support?
- How will you support households who may be eligible for grant support to access this funding?
- If work will be self-funded, does the householder need advice on sources of finance?
- Is support needed to access suitable contractors, understand quotes or choose appropriate materials?
- If your target audience is self-funded, with sufficient skills and interest in DIY for simple measures, how can you support this with appropriate information?
- Are there likely to be complicating factors, such as traditional building construction or planning restrictions?
- How will you approach quality assurance post-installation and ensure any issues are resolved?
- Will post-installation advice be needed to help households get to grips with new technology or load-shifting behaviour change?



A typical retrofit journey.

Initial engagement and advice

- The LEAD Toolkit provides examples and tips for a variety of engagement options.
- Research shows that key triggers for engaging with retrofit are major renovations, buying a new house (also highlighted by LEAD partners), in reaction to a problem (such as heating system failure or structural issues), death or inheritance, routine maintenance, or a growing family ([Brown et al, 2025](#)).

Funding routes

- If the householder is eligible for grants, they might need support to apply for these.
- If they are not eligible for grants, they may need advice on self-funding options.

Retrofit assessment and EPC (if needed)

- These services should be provided by a qualified professional retrofit assessor and comply with PAS 2035 requirements.
- Different assessment software may give varying answers for the specification of measures, and should always be validated by in-home assessment.

Pre-installation

- Many people need prompts and support throughout the retrofit process – if it's not a top priority for them, they may not see it through (despite good intentions).
- Six months after assessment is a good time to check in on progress, but timescales can be much longer, e.g. unlocking funds through remortgaging or saving.
- Quality installation matters, and many people will need quality assurance schemes explained to them.
- People may need help in finding an appropriate installer. There are guides available (see Further resources), or your project might set up or use a local vetting scheme or local authority framework.

- Quotes for work can be confusing. Advice is often needed to understand quotes, and whether they are like-for-like. A quote review service can give people confidence to accept a quote they have received.

Installation

- Onsite help during installation is sometimes useful, as many people lack confidence in briefing contractors and this can help build trust.

Post-installation

- Householders may need advice with how to use their new systems, heating controls or apps, especially if the technology is new to them.
- Heat pumps, solar or battery storage may require load-shifting behaviour or tariff switching to get the best value from the system. Householders may need education and advice to support this adjustment.

Further resources

[Plymouth Energy Community's customer journey guide](#)

[Retrofit West Professionals Directory](#)

[The Green Register](#)

[SEDA's technical design guides](#)

[Sustainable Renovation: Improving homes for energy, health and environment](#)

[Community-led retrofit resources](#) by CSE

[Community Retrofit Guide](#) by CSE (2024)

[How to run a community energy advice service](#) by CSE (2023)

[The Retrofit Playbook](#) by the UK Green Building Council (2020)

Giving good advice

Insights from the LEAD projects in the South West, including tips and audience insights

Top tips on providing advice

- Common retrofit terms, including “retrofit” itself, are often not understood by the general public, and people are often confused about insulation types.
- Language matters. Different audiences will respond positively to different phrases and messages.
- People are sceptical of free services, and discounted services can be received more positively.
- Case studies with real people help to build trust.
- Make it visual and give people tangible information to show the benefits of retrofit. Visual aids, such as thermal imaging, are engaging and motivating.
- Take stock of people’s starting knowledge. Some will have done a lot of their own research before seeking at advice, others none at all.
- EPCs are a tool that can be used as part of the retrofit conservation, but they are based on generic data and don’t always highlight the most appropriate actions for a specific home.
- Every home is different, and people often need help to understand how general advice applies to the specifics of their own home.
- Repairs and home maintenance (e.g. guttering, bleeding radiators) are often underestimated in their impact on energy performance and damp. It’s important to address these within advice, where relevant.
- Good advice will often consider external factors that could affect what measures are appropriate (such as salt spray, wind-driven rain and flood risk) and should also consider the householder’s lifestyle, patterns of energy use, health and financial resources.



- Behaviour change should be an important part of advice, and may also be essential to make best use of retrofit measures (e.g. battery storage, solar or heat pumps).
- Heat loss and air tightness testing can enhance advice by identifying problem areas.
- Information on the embodied carbon of materials can help people make better, more informed decisions about sustainable retrofit.

Further resources

Please refer to the wider LEAD Toolkit. Others:

[Retrofit priorities \(hermit crab video\)](#) by Stoke Climsland Carbon Zero Homes Project

[Heat Geek heat pump tool](#)

[ThermaFY](#) home surveys software platform

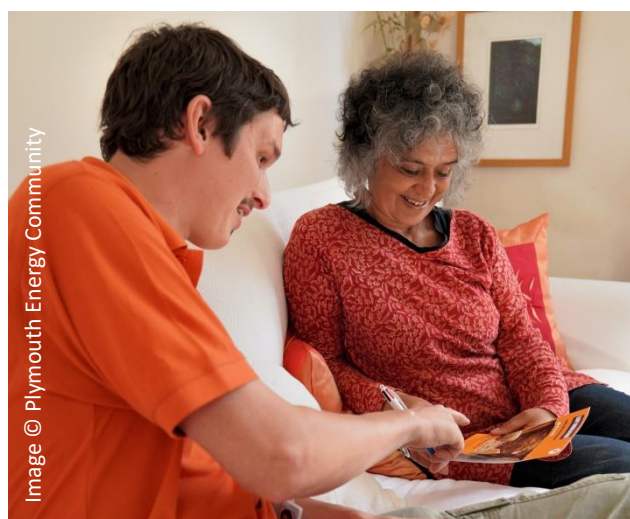
[Fairer Warmth](#) online CRM and data management platform

Audience insights

Our six LEAD projects worked with a variety of audiences. Here are some lessons learned and tips for replications, alongside other key facts. Remember that these audiences can overlap.

Families with children

- Toddler groups are receptive to messages about warmer homes and the environment.
- Schools may seem an obvious route for engagement, but they often lack capacity to get involved, and rarely engage without personal connections and curriculum links.
- Parents are often less rushed at school pick-up times. This can be a good time to host advice café drop-in sessions.
- Parents are too distracted when looking after young children to easily engage with advice; running a children's activity alongside can help, though this increases the cost of outreach.
- Engaging young people through extracurricular activities (e.g. National Youth Service, Scouts) can be a route to engage parents.



Digitally excluded and low literacy

- 5% of the UK adult population is offline ([Ofcom, 2024](#)); this is often a trust issue, with people choosing not to engage through fear of scams.
- It is very hard to apply for grants independently if you are not online, as this is where information about grants is published, and online sign-up is typically required to engage with grant applications. Offline audiences will need support with this.
- 18% of working age adults in England have very poor literacy skills ([Literacy Trust, 2024](#)), and cannot be expected to engage in detailed written information or to complete forms.
- Some local areas have particularly low literacy levels – you can't always assume that people can read and write. Meeting people through community groups and conversations can overcome low literacy barriers.

Older people

- Many older people can be uncomfortable with change and anxious about needing to engage with new technologies, and may need more reassurance and post-installation support.
- Services for older people cannot assume internet access; this group is more likely to be offline (13%) than the general population (5%) ([Ofcom, 2024](#)).
- Scams are inhibiting trust in online services; anecdotally, LEAD projects found that some older people (including 'young' older people aged 50+) previously online are choosing to come offline due to fear of scams.
- Trusted intermediaries and/or face-to-face contact may be needed to help engagement.

Landlords

- Private landlords will be required to meet a new minimum energy efficiency standard (MEES) of EPC C (currently EPC E) by 2030 ([DESNZ, 2025](#)).
- Energy efficiency in the private rented sector is worse than the owner-occupied or socially rented sectors ([Nesta in DESNZ, 2025](#)).
- LEAD in the South West found that estate agents did not engage at all, while landlords themselves showed interest but did not pursue installation. This was prior to confirmation of the 2030 target; engagement is likely to increase as this draws nearer.
- Landlords will need information on measures to meet EPC C, in line with upcoming legislation.
- LEAD projects found that landlords tend to be older and wealthier, and that they were motivated by language such as “futureproofing” and “investment”.
- Landlords need a different report to home owners as their priorities will likely be different, e.g. how to increase the value of the property through retrofit, or to better appeal to tenants.
- Many landlords don’t think of themselves as ‘landlords’ and often have just 1-2 rented properties, which can be anything from an annex to their own home to large houses in multiple occupation (HMOs)
- Landlords can be reached effectively through targeted digital advertising, articles in local press and local landlord forum meetings (for face-to-face engagement).

Renters

- Renters can benefit from advice on behaviours and tariffs, but are likely to be put off by advice on changes outside their power.
- If renters pay a flat rate for their energy, they are unlikely to engage at all.



People living in deprived neighbourhoods

- Community organisations are usually more trusted than other sources, but you cannot assume that being a credible source of support for other work will translate into credibility for giving energy advice.
- This audience is often eligible for retrofit grants, and community outreach can help convey this message.
- Often the words “free” and “energy advice” are not a good choice. “Free” in particular can devalue advice, and give rise to suspicion about motives.
- This audience often responds poorly to sales-style or complex messages.
- It’s useful to allow for small measures and repairs as solutions when designing projects, not just larger measures. Easy wins to build trust (e.g. bleeding radiators and turning flow temperature down) and can then lead to conversations about bigger steps.
- Low-income families are unlikely to engage with energy advice outside of the heating season, as they are focused on week-by-week survival.
- People experiencing more disadvantage are more likely to respond to messages about “home improvement”, “maintenance” and making homes warmer and cheaper to heat, and less likely to respond to words like “retrofit” or “energy advice”.

People living in traditional buildings

- Traditional buildings work differently to modern buildings in the way that energy and moisture move around the building, and most householders will need educating about this.
- There are still misconceptions that traditional buildings can't be retrofitted, when most can be significantly improved with the right approach.
- Traditional buildings need a different, informed approach to retrofit advice, as generic retrofit advice often doesn't apply and can cause damp or overheating. When designing a service, consider how to deal with enquiries about older buildings.
- Repairs and maintenance are particularly important for traditional building advice.
- EPCs don't reflect the complexities of traditional building construction, so may not be a good reference point; additional support will be needed to understand how measures will affect the home.
- Information about embodied carbon (in choice of materials) can also help nudge people towards more heritage-friendly options, such as natural materials.
- A flexible approach is needed to 'fabric first' principles in traditional buildings, and options may be restricted by planning and listed building rules.
- When people receive very early advice on options for retrofitting traditional buildings, this often raises their level of ambition.
- Householders need help understanding how energy use and heritage conservation considerations can work together.
- People who live in traditional buildings are rarely experts on their construction or terminology, and may need support to navigate the language required for planning applications and listed building consent.

- It is important that early advice reflects both heritage conservation and retrofit considerations. This should focus on what is possible, rather than what is not, to help raise ambition.

Self-funded households

- Self-funded audiences are not always 'able to pay' – this group includes many middle earners who lack enough spare cash to invest in retrofit.
- Suggested retrofit measures can come with a high cost, so information on finding ways to finance retrofit, such as during remortgaging, can be helpful.
- Free or subsidised advice can help self-funded households get started, and encourage them to see the value of investing in retrofit for their home.
- Some self-funded audiences prioritise quick returns on investment. It has become harder to give them clear return periods as time-of-use tariffs and home battery systems have emerged.
- This audience cares less about warmth and comfort messages (because they can already afford to stay warm) and more about long-term investment and returns.

Further resources

Please refer to the wider LEAD Toolkit.

[Able to pay retrofit report](#) by CSE for Bristol City Council (2022)

[Climate Action Fund: Energy report](#) by National Lottery Community Fund (2023)

LEAD in the South West of England (2023-25)

Programme funder

LEAD was funded by the **Department for Energy Security and Net Zero**.



Programme manager

In the South West of England, the programme was managed by **South West Net Zero Hub**.



LEAD project partners (with lead partners in bold)

361 Energy CIC • Bath and North Somerset Council • **Bath and West Community Energy** • Bath Preservation Trust • Bristol Energy Network • **Centre for Sustainable Energy** • Community Energy Plus • Cornwall Council • Devon County Council • Exeter Community Energy • Green Isle of Wight CIC • People Powered Retrofit • Plymouth City Council • **Plymouth Energy Community** • **Severn Wye** • South Dartmoor Community Energy • Swindon Borough Council • Tamar Energy Community • **Testlands** • Wiltshire Council

