

Retrofit proto- personas for local and combined authorities

Condensed and print-friendly proto-personas to
accelerate place-based retrofit in local and
combined authorities

(use alongside the full toolkit)

March 2025

About this toolkit

Funded by [The MCS Foundation](#), this toolkit has been created to help local and combined authorities, working to develop place based retrofit strategies, to better understand the needs and motivations of households and property owners. It is primarily aimed at authorities in England, but most of the content will be relevant for the rest of the UK.

To maximise the uptake of retrofit schemes and grants, effective engagement with households and property owners is essential. However, the audience for place based retrofit schemes can be diverse in terms of their life stages, relationships to their homes and motivations for considering installing retrofit measures.

Personas are archetypal fictional characters that, when based on robust research data, can be used to help understand the varied journeys and motivations of people considering engaging with retrofit.

There are many publicly available guides and playbooks detailing how to establish retrofit strategies, design retrofit services, and plan engagement campaigns. Some authorities have highly developed persona sets to aid their work whilst others are only beginning to formulate their approach.

There is a gap, therefore, for a publicly available set of personas (or proto-personas) that all authorities can use to accelerate retrofit engagement.

This toolkit aims to:

- Help those local and combined authorities that have existing persona sets to validate and build on them - understanding the barriers people face when considering retrofit and how to intervene to overcome those barriers.
- Provide those authorities without personas a head start in creating their own resources specific to their local context.

In both cases we hope that this opensource toolkit acts as a source of inspiration, providing useful information and onwards direction alongside other resources to accelerate retrofit strategies across the country.

Please note: This is a truncated version of the toolkit, designed to be more printer friendly than the full toolkit. It is intended to be used alongside the full version which can be found on the NEC Digital Studio website under 'case studies'.



Personas and proto-personas

A **persona** is a fictional character created to represent a group of people with similar service needs, motivations and common behaviours. They should be based on research collected from interviews with real people. Personas are different from marketing profiles or segmentation, which usually segment people according to age, ethnicity, gender or socio-economic status.

Unlike a user profile - which stems from patterns in quantitative data and usually refers to individual behaviours, a persona is a rich portrait of a product or service user that is brought to life by including contextual detail about their life and often a portrait photo. Personas should be built from in-depth, high quality user research.

Evidence based retrofit personas in the public domain include:

- Fuel poverty personas created by the Person-Centred Retrofit project (2022)
- Who are the early adopters? Understanding Homeowner demand for Heat Pumps. Citizens Advice (2025)

A **proto-persona** is the precursor to a research informed persona. It is a hypothesis-based tool which allows teams to:

Create alignment between stakeholders about who their service users are including their motivations and likely user behaviours

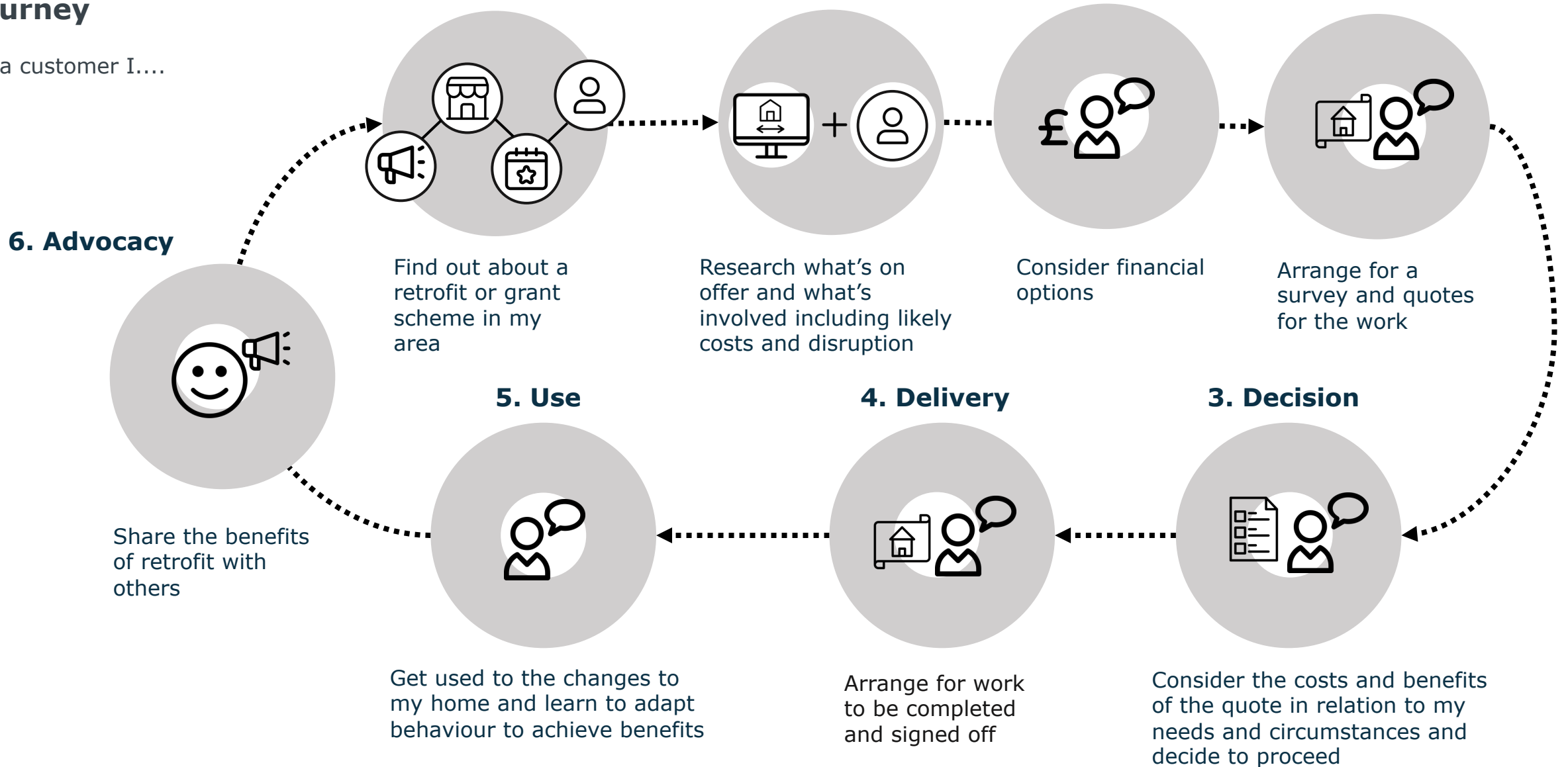
Unpack core assumptions about service needs and identify priorities for further research

Create an initial communication and engagement strategy which can be tested and developed upon.

Unlike full personas that focus on a specific fictional character, proto-personas use abstract labels that highlight key characteristics of the user type. This allows teams to focus service design and communication design on the most important factors that impact different groups of users.

The key stages of the retrofit customer journey

As a customer I....



Common barriers, motivations and key messages for all households

The UKGBC Retrofit Playbook summarises the common barriers and motivations that should be considered for all households.

We are including these here as they will apply across our set of proto-personas. The proto-persona set highlights when different households maybe more or less sensitive to these factors:

Barriers to retrofit common to all households: the hassle factor of clearing space and getting work carried out, lack of knowledge about why bother with retrofit; cost vs perceived value, and lack of trust in tradespeople and the quality of their work.

Motivations common to all households: home improvement, comfort, cosier, better homes, a commitment to reducing their carbon footprint. Saving money on bills can be a motivating factor in the mix, but it is often not a reported benefit when residents are surveyed afterwards.

Proto-personas as lenses

The proto-personas have been developed for local authorities to use as inspiration for targeting key groups of retrofit customers. Some are driven by core values, some are centred on a life moment and some are built around key demographics or circumstances.

You can see all 8 of these proto-personas to the right.

These proto-personas have been created to be used in conjunction with each other. Use them as lenses to create a richer, and more accurate, picture of a target group by considering whether that group falls under multiple proto-personas and how that might impact an engagement strategy or messaging campaign.

The next page gives an example of this.

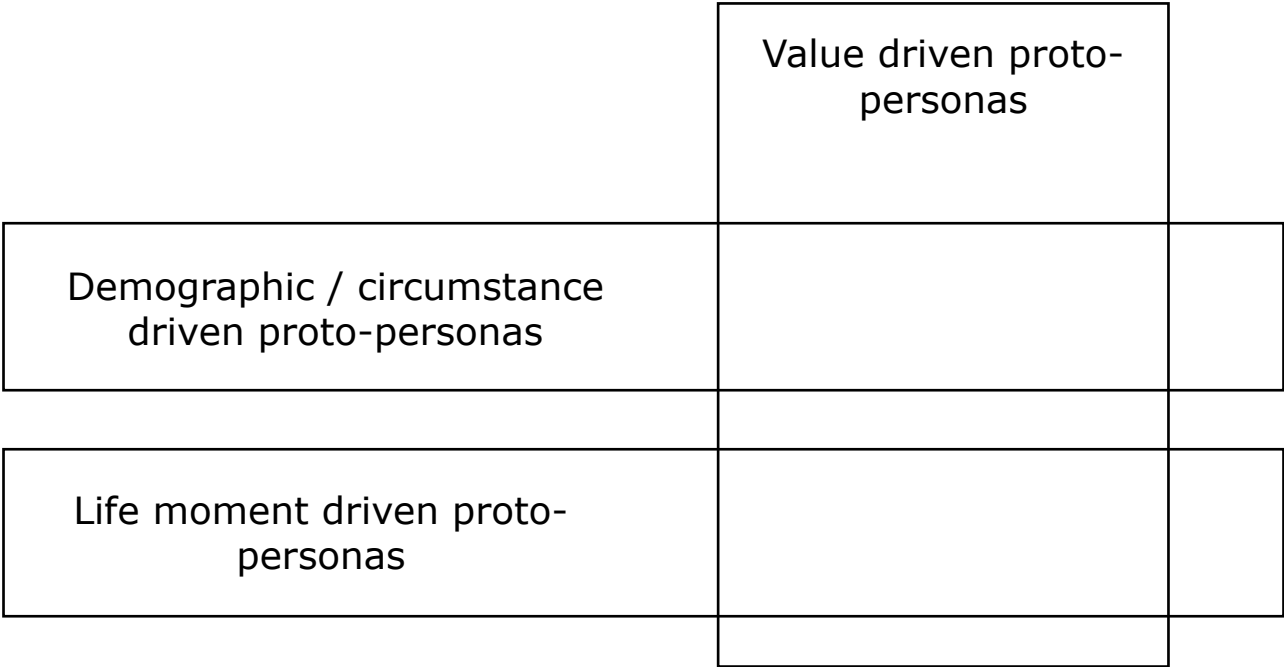
<p>Smart life enthusiasts</p> <p>Values driven</p> 	<p>Committed greens</p> <p>Values driven</p> 
<p>Private landlords</p> <p>Demographic / circumstance driven</p> 	<p>Home buyers</p> <p>Life moment driven</p> 
<p>Social housing tenants</p> <p>Demographic / circumstance driven</p> 	<p>Property ladder climbers</p> <p>Life moment driven</p> 
<p>Fuel poor households</p> <p>Demographic / circumstance driven</p> 	<p>Home improvers</p> <p>Life moment driven</p> 

Lenses in practice

The value driven proto-personas are most likely to be useful as lenses. For example, a **Home Buyer** might also be a **Committed Green**. Their biggest trigger to begin considering retrofit for this group may be buying a new home, but they may also find out about retrofit from environmental groups they are involved in.

This group may be the most receptive to messaging about green mortgages.

In this way you can build strategies to target more complex groups or consider how engagement campaigns might affect multiple customers.



How might we engage a group of **Committed Greens** who are also **Home Buyers**?



Committed greens

Summary

[Value driven persona] Conscious and committed to addressing environmental issues. Consider environmentally sustainable options when making purchasing decisions. Interested in making their homes as energy efficient as possible to help tackle climate change.



Key motivations

- Making their home more environmentally sustainable to protect future generations
- Believe that tackling climate change requires radical urgent change
- Committed greens who are also affluent well-educated home owners are the core audience for whole house retrofit schemes

Triggers

- Home improvements
- Buying / building a new home
- The opportunity to join or invest in a community energy scheme
- Appliances or gas boilers breaking down will be a time sensitive trigger for seeking out energy efficient alternatives

Messengers

- Environmental charities and community groups
- Likely to trust messaging from a local authority rather than private sector brands

Further reading and references

- This proto persona aligns closely to the Progressive Activist segment within the Britain Talks Climate toolkit

Committed greens

Retrofit stages ►	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Likely to have already undertaken basic energy saving measures and doubt they can do any more. Replacing a gas boiler with a heat pump or replacing old appliances before they break may be seen as 'wasteful'. 	<ul style="list-style-type: none"> May be suspicious of private sector finance partners such as energy utilities and high street banks. Those who already have solar panels may be unsure how additional measures impact existing feed-in tariff payments. May have considered solar in the past and been told their house was unsuitable. Now need persuading to revisit this decision Likely to have invested in a series of retrofit measures over a long period of time and need convincing they can do more. 	<ul style="list-style-type: none"> Committed Greens often become local champions for retrofit, willing to spend time and effort encouraging others to retrofit. However, make sure they are equipped with messaging that appeals to others less committed to climate action.
Potential messaging*	<ul style="list-style-type: none"> Lower carbon emissions: Increase home energy efficiency and lower carbon emissions by reducing the amount of energy used to heat your home. Reduce reliance on fossil fuels: Install low carbon technologies such heat pumps and solar panels. Note: Committed greens may not be receptive to messages that revolve around owning an electric vehicle (EV). Some have concerns about extraction of 'rare earth' minerals to make EV batteries or may be in favour of active travel instead of private vehicle ownership. Note: May be reluctant to replace computers and mobile phones until they break. Means they may have trouble accessing video-based messaging content or interactive planning tools. 		<ul style="list-style-type: none"> Extend your impact: Spread the word about retrofit within your community to further lower emissions, save others money and increase the comfort of their homes.
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> Email/newsletter from environmental charity or community group. Likely to trust messaging from a local authority rather than private sector brands. Send information about funding opportunities alongside council tax bills 	<ul style="list-style-type: none"> Make it easy to find information and understand the steps involved: Direct to available local authority information and support services e.g. one stop shops, web pages, telephone advice lines; direct to <u>3rd party websites that can provide clear advice and guidance</u> Direct to LA/Gov funding websites with financial and environmental incentives highlighted. Direct to credit unions and community energy schemes for funding Utilise trusted local green businesses such as refill shops and community co-ops. 	<ul style="list-style-type: none"> Encourage to join an open house scheme or register on '<u>Visit a heat pump</u>'

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

Smart life enthusiasts

Summary

[Value driven persona] A high interest in new technology and using multiple smart devices at home already, such as smart thermostats and smart TVs.

They enjoy the convenience; time saving and control that smart devices can bring and are capable and motivated to change behaviours by adopting smart technologies.



Key motivations

- Improving the quality of life by using smart devices to provide enhanced convenience and control
- EV owners are often attracted to installing solar panels by the idea of 'driving for free'. Battery storage and heat pumps can then be perceived as maximising the use of 'free' energy sources

Messengers

- Energy utilities targeting adopters of EVs, solar power and batteries
- Word of mouth and social media posts from friends and family

Triggers

- Home improvements
- Buying / building a new home
- Buying or leasing an electric vehicle (EV) may lead to interest in installing solar panels and battery storage.
- When EV owners adopt smart tariffs to gain cheaper charging, the energy utility may target the householder with incentives to install retrofit measures

Further reading and references

- Octopus Energy and Ovo Energy are examples of energy utilities targeting Smart Life enthusiasts with tariffs and schemes that encourage uptake of retrofit measures.

Smart life enthusiasts

Retrofit stages ►	Awareness	Consideration	Decision making	Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Lack of knowledge of retrofit measures and how to identify the best options for their property Heat pumps perceived as paying out for little experiential gain. Likely to seek a highly personalised service and expect to engage with schemes online. 		<ul style="list-style-type: none"> Heat pumps are not currently associated with either <u>'enhanced living'</u> or <u>'free for life' energy</u> 	<ul style="list-style-type: none"> Solar panels and EVs can provide highly visible evidence of smart living and this can lead to interest snowballing within a local community. Heat pumps are less visible and aspirational.
Potential messaging*	<ul style="list-style-type: none"> 'Free' energy: Harness the appeal of 'free' energy and self sufficiency to encourage households with EVs to adopt solar and battery storage. Market heat pumps as making the ultimate use of onsite renewables to provide <u>'free heating'</u> as well. Enhanced living: Communicate the 'experiential benefits' of retrofit measures that lead to enhanced living such as improved insulation and smart controls alongside the opportunity for lower bills. Make smart changes: Messaging to this group should focus on making smart changes to your home alongside messaging that communicates cash and carbon savings 			<ul style="list-style-type: none"> Spread the news: Social media campaigns and tags can be used to encourage smart life enthusiasts to share the benefits of going 'all electric' by installing a heat pump.
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> Likely to be targeted directly online by energy utility companies offering one stop packages for solar and heat pump installation. Partnerships with trusted national brands will help Local and Combined authorities engage this group with retrofit schemes. Consider marketing directly to those leasing or considering EVs Could be early adopters of <u>'heat as a service'</u> propositions 		<ul style="list-style-type: none"> Online planners and calculators of savers such as those provided by <u>Cozy Home Oxfordshire</u> might appeal to this group as likely to expect a personalised online service 	<ul style="list-style-type: none"> Likely to be online via social media platforms in collaboration with energy utility partners Encourage to join an open house scheme or register on <u>'Visit a heat pump'</u>

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

Fuel poor households

Summary

[Demographic / circumstance driven] Spend above average of available income on energy costs (According to the Office of National Statistics, a household is defined as being in fuel poverty if it spends at least 10% of its net income to maintain a satisfactory heating regime) and employ various methods to keep costs down, such as only heating certain rooms in their home. Very likely to live in a home that has poor energy efficiency leading to higher energy bills and risk of mould and damp. Likely to include households living in older properties including solid wall homes. May be homeowners or tenants and may have recently fallen into fuel poverty through increased energy bills even though in work.



Key motivations

- Reducing energy bills. However, many households may already use very little energy, so have little opportunity to save further through behaviour change.
- Improving air quality by reducing damp and mould
- Retaining energy and increasing warmth of the home for improved health and wellbeing

Messengers

- GP surgeries
- School and colleges
- Local community
- Local authorities

Triggers

- A cold winter
- Damp and mould growth in the home
- Working from or spending more time at home
- Poor health, increased number of respiratory related illnesses
- Hospital admission for respiratory illness

Further reading and references

- The [European Commission](#), [mPower](#), and [Citizens Advice](#) all have useful guides to help engage people in fuel poverty

Fuel poor households

Retrofit stages ►	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> • Lack of knowledge of grants and funding options available • Rent paying private tenants unable to install measures may still benefit from energy saving advice but may not know where to find this • Lack of time to research retrofit measures to identify the best options for their property 	<ul style="list-style-type: none"> • Lack of knowledge of retrofit measures and how to identify the best options for their property • Low income and low savings so will not be able to afford retrofit measures without grant help • Rent paying tenants may have concerns that improving the property will increase their rent • Rent paying tenants have less autonomy than homeowners regarding retrofit decision making 	<ul style="list-style-type: none"> • May initially be suspicious of local authority schemes when there is a need for income benefit checks. • Those who have taken up grants often become strong advocates for schemes with friends and neighbours
Potential messaging*	<ul style="list-style-type: none"> • Reduce energy costs: Break free from rising energy costs with home upgrades that make your home more energy efficient. • Budget friendly: Our home retrofit plans are designed with your budget in mind, offering a step by step process to improve your home's energy efficiency without financial strain • Apply for grants: You may be eligible for a grant to make your home warmer and healthier • Gain a healthy home: reduce damp and mould 	<ul style="list-style-type: none"> • Get money to fund retrofit activities: Grants are available to help cover the cost of energy saving measures • Spread the word: Encourage those who have already had measures installed, to share positive outcomes (reduced energy bills and a warmer healthier home) with their friends, neighbours and school community 	<ul style="list-style-type: none"> • Know someone who could benefit from a warmer home or lower energy bills? • How to get the most from your home improvements: Offer automated email courses or a newsletter. Include advice and tips on how to use newly installed measures, encouragement to tell others about the benefits, and direct to trusted messengers who have more information
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> • Primary care waiting rooms and community centres • Make sure trades people coming to the home to quote for addressing damp and mould are aware of available retrofit grants. • School electronic newsletter or PTA meetings 	<ul style="list-style-type: none"> • Make it easy to find information and understand the steps involved: Direct to available local authority information and support services e.g. one stop shops, web pages, telephone advice lines; direct to <u>3rd party websites that can provide clear advice and guidance</u> • <u>Make grants easy to understand</u> 	<ul style="list-style-type: none"> • Utilise trusted messengers and previous touchpoints to continue engagement and encourage onward knowledge sharing

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

Social housing tenants

Summary

[Demographic / circumstance driven] Tenants of social housing provided either by a local authority or housing association. They have limited choice and control over decisions that are made about the property and are likely not the instigators of any retrofit process. Engagement with tenants is however crucial to the successful delivery of a retrofit project. Understanding the benefits of retrofit will help tenants feel a sense of control and encourage them to provide timely access to contractors

Tenants may be distrustful of the local authority or housing provider and need reassurance that any measures proposed will not increase energy bills, increase their rent, or result in eviction. They are more likely to trust other authority figures such as teachers, medical professionals or community leaders

Key motivations

- To improve the warmth and comfort of their home
- To reduce and remove any factors that might cause medical issues such as damp and mould

Messengers

- Friends / neighbours
- Schools
- Healthcare professionals
- Community leaders

Triggers

- Notification from social housing provider that they intend to install retrofit measures
- Learning about the benefits of retrofit from neighbours and friends who have had similar work done

Further reading and references

- [RISE offer specific advice and guidance on engaging social housing tenants including how to plan engagement and what messages to consider](#)



Social housing tenants

Retrofit stages	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Lack of general information about or awareness of retrofit measures Likely to be put off by unfamiliar or confusing terminology May not trust retrofit measures that have had negative press such as heat pumps or external wall insulation 	<ul style="list-style-type: none"> May refuse access to the property to contractors as: Split incentive- less likely to allow work to be done if only see the housing provider benefitting May only expect to be in the property a short time so don't expect to benefit from the measures May have health issues or disabilities that mean they are anxious about the disruption the work will cause 	<ul style="list-style-type: none"> Need to know how to use retrofit measures, particularly heat pumps correctly to gain the planned cost and carbon savings and ensure comfort. Those that have experienced the health and comfort benefits of retrofit likely to spread the word
Potential messaging*	<ul style="list-style-type: none"> Reduce costs: Break free from rising energy costs with home upgrades that maximise efficiency. Fix damp and mould issues: upgrades to your home can reduce bills, reduce damp and mould and improve your health and comfort 	<ul style="list-style-type: none"> <u>Understand specific barriers and vulnerabilities to tailor messaging to different target audiences:</u> <u>Simple, salient messages</u> from trusted sources will be more effective than high level, blanket approaches Consider the language needs of tenants who do not have English as their first language 	<ul style="list-style-type: none"> Know someone who could benefit from a warmer home or lower energy bills? / How to get the most from your home improvements: Offer automated email courses or newsletter. Include reminders, advice and tips on how to use newly installed measures, encouragement to tell others about the benefits, and direct to trusted messengers for more information
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> Actively involve tenants early in the retrofit planning and decision making process to share the benefits and address concerns Utilise community champions or tenant ambassadors who have retrofit measures installed to increase engagement and trust 	<ul style="list-style-type: none"> Make it easy to find information and understand the steps involved: Direct to available local authority information and support services e.g. web pages and telephone advice lines; direct to <u>3rd party websites that can provide clear advice and guidance</u> Encourage visits to homes on open house schemes or on '<u>Visit a heat pump</u>' 	<ul style="list-style-type: none"> Encourage to become a champion for retrofit in their community Utilise trusted messengers and previous touchpoints to continue engagement and encourage onward knowledge sharing

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

Private landlords

Summary

[Demographic / circumstance driven] Own one or more properties in addition to their own home and privately rent them out to others. Likely to be aware of the need to install some retrofit measures on properties with a low EPC rating and/or damp or mould issues but unclear on the process and technologies available. Keen to meet regulations with minimal investment. Timely opportunity for retrofit at the end of tenancy periods particularly for student landlords.



Key motivations

- To ensure their properties comply with existing and upcoming government legislation
- To improve the energy efficiency and comfort of their properties to increase their attractiveness to potential tenants
- To ensure any investment in retrofit measures is financially sustainable and adds value to the property on re-sale

Messengers

- Landlord associations
- Local authorities
- Letting agents

Triggers

- Receiving news about legislative deadlines
- Tenants moving out of the property
- Conducting other building work on the property
- Adding to their property portfolio

Private landlords

Retrofit stages	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Lack of understanding or awareness of retrofit measures Concerned about changing policy plans, especially current plans to force rental properties to reach an EPC band C minimum by 2030 Lack of certainty over the way EPCs are calculated and what landlords will be required to do to meet targets 	<ul style="list-style-type: none"> Lack of information about the possible increase in the value of their properties if they undertake retrofit measures Lack of incentive to lower energy bills that they don't pay or improve living conditions they don't experience May lack the funds for retrofit measures for multiple properties because of low savings or an inability to borrow Concerned about losing tenants if they need to raise rents to cover retrofit measure costs May rely on trusted builder and maintenance teams who may not be aware of retrofit measures and grants 	<ul style="list-style-type: none"> Continued problems with damp or inefficient energy use in properties due to tenants not understanding how to use and adapt their behaviour to make best use of a heat pump Poorly installed external insulation can lead to new damp and mould issues
Potential messaging*	<ul style="list-style-type: none"> Get EPC C ready: Get ahead of government legislation deadlines requiring an EPC C rating in all rented properties by 2030 Prepare for Awaab's Law: The government is likely to require all landlords to fix reported damp and mould problems within strict time limits. Retrofit now to prevent damp and mould in rented properties 	<ul style="list-style-type: none"> Get money to fund retrofit activities: The Warm Homes: Local Grant can provide up to £15,000 towards low-carbon heating installations and £15,000 energy performance upgrades for eligible properties Spend less on repairs: Retrofitted properties are likely to have fewer issues with damp and mould, which means fewer reports and fewer repairs Increase the property's value: <u>Retrofitting a property can increase its value by up to 20%</u> Reduce chances of rent arrears: Lower energy bills for tenants means they less likely to fall behind on their rent 	<ul style="list-style-type: none"> Get tenants involved: Consulting tenants in the decision-making process and engaging them in how to use or adapt to the installed measures will lead to sustained improvements in comfort, lower bills and less queries and complaints
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> Direct to information services via landlord associations such as the National Residential Landlord Association or the British Landlord Association Engage letting agencies to help disseminate up to date information on grants and regulations Make it easy to find information and understand the steps involved: Direct to available local authority information and support services e.g. one stop shops, web pages, telephone advice lines; direct to <u>3rd party websites that can provide clear advice and guidance</u> 		

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

Property ladder climbers

Summary

[Life moment driven] Property ladder climbers take a functional, economic approach to upgrading their property. They may own their property outright or with a mortgage. They may be first time buyers, looking to get a foothold in the property market. The property is not their 'forever home' and they are planning to sell the property in the near future for profit or as a step towards a bigger home. Retrofit measures are, therefore, likely to be targeted to ensure the investment adds value and to increase the likelihood of a sale.



Key motivations

- To improve the energy efficiency of their home to increase its resale value and attractiveness to potential buyers
- To ensure any investment in retrofit measures is financially sustainable and that they will recoup the upfront costs when they sell

Triggers

- Other work needing to be carried out in the home, for example: emergency or mandatory repairs and property upkeep
- Getting a valuation from an estate agent
- Undertaking an EPC assessment prior to putting the property on the market

Messengers

- Peers / neighbours who have installed retrofit measures
- Estate agents
- DIY stores and websites
- Mortgage providers

Property ladder climbers

Retrofit stages ►	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Lack of general information about or awareness of retrofit measures Likely to base decisions on installing measures based on whether they will add to the re-sale of the home short term. This depends on property websites such as Rightmove and estate agents highlighting retrofit measures within property ads 	<ul style="list-style-type: none"> Lack of information about the possible increase in the value of their home if they undertake retrofit <u>Length of anticipated tenure</u>. Property ladder climbers need to be reassured that they will recoup the upfront cost of retrofit measures when they sell on. Green finance packages are needed tailored to those not expecting to keep the property more than a few years May be concerned that heat pumps will make their property harder to sell on 	<ul style="list-style-type: none"> Property ladder climbers may be particularly cost sensitive and tempted to cut corners with retrofit leading to future damp and mould issues. Make sure community champions are briefed to advocate to others about the need for a whole house retrofit plan
Potential messaging*	<ul style="list-style-type: none"> Increase your property's value: Retrofitting a property can increase its value by up to 20% Counter common myths about heat pumps with clear messaging about their benefits from trusted private sector messengers such as Rightmove and Octopus Energy. This will reassure property ladder climbers that a heat pump won't adversely impact re-sale 		<ul style="list-style-type: none"> Know someone who wants to increase their property's value?: Offer automated email courses or newsletters. These might include reminders, advice and tips on how to use newly installed measures, encouragement to tell others about the benefits, and direct them to contact trusted messengers who have more information
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> Estate agents and property websites Architects and tradespeople - e.g. heating engineers and builders DIY stores and building merchants Add grant information to, or send alongside council tax bills 	<ul style="list-style-type: none"> Make it easy to find information and understand the steps involved: Direct to available local authority information and support services e.g. one stop shops, web pages, telephone advice lines; direct to 3rd party websites that can provide clear advice and guidance EPC assessors surveying home ready for re-sell 	<ul style="list-style-type: none"> Utilise trusted messengers and previous touchpoints to continue engagement and encourage onward knowledge sharing Make sure trusted suppliers are identified within the community and widely shared

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

Home improvers

Summary

[Life moment driven] Commit to home improvements due to changes to the family or to their circumstance. For example, families with young children are more involved in higher value projects as they are often running out of space. Empty nesters preparing for retirement are often interested in specific heating projects. These households have already committed to a period of disruption and change so may be less sensitive to the disruption and hassle of installing retrofit measures They may be considering a remortgage or equity release to fund improvements and will often seek advice from their neighbours and peers who have experienced similar upgrades.



Key motivations

- To improve their home to better meet changing family needs, to expand or re-purpose living spaces and increase comfort
- Likely to be interested in retrofit opportunities as part of a wider home improvement project
- May have a higher tolerance of disruption if they are committed to an extension or remodelling of a living space
- Seeking comfort and convenience in line with life stage needs
- They ideally want any improvements to increase the value of their home

Triggers

- Other work being carried out in the home as part of wider home improvement projects
- Changes to the family such as children growing or moving out, or elderly relatives moving in
- Spending more time in the home, due to a change in work or retirement
- An influx of money, e.g. from an inheritance

Messengers

- Peers / neighbours who have installed retrofit measures
- Trades people / DIY stores
- Local authorities

Home improvers

Retrofit stages ►	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Lack of general information about or awareness of retrofit measures and how they can enhance the home Likely to be put off by unfamiliar or confusing terminology May not trust retrofit measures that have had negative press such as heat pumps or external insulation 	<ul style="list-style-type: none"> Uncertain how retrofit measures fit in with broader home improvement projects and tradespeople may not highlight retrofit opportunities May have a fixed budget for the planned home improvement project so the cost of retrofit measures needs to fit into this budget 	<ul style="list-style-type: none"> Want to avoid or smooth any changes in behaviour or additional expenses resulting from installed measures Friends and neighbours are trusted sources of information when sourcing contractors for home improvements so encourage community advocacy
Potential messaging*	<ul style="list-style-type: none"> Get heat pump ready: The term 'retrofit' is not well known or understood. The term 'heat pump' is becoming more familiar so getting the home ready for one may appeal to people who do not yet trust the technology but want to future proof their home Messaging should focus on upgrading the home making it cheaper to heat, more cozy in the winter and cooler in the summer. Raise awareness of schemes via social networks using trusted community partners 	<ul style="list-style-type: none"> Use behavioural insights to tailor messaging to different target audiences: <u>Simple, salient messages</u> from trusted sources will be more effective than high level, blanket approaches Retrofit decision making is often relational rather than rational provide advice through already trusted community partners 	<ul style="list-style-type: none"> Know someone who could benefit from a warmer home and lower energy bills? encourage those with newly installed retrofit measures to share the benefits with their social networks Get the most from your home improvements: Help households maximise the benefits of newly installed measures through providing automated email courses or newsletters containing advice, tips and help lines
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> DIY stores- Adverts on websites, information leaflets in shops, or bespoke 3rd party services such as <u>B&O's Energy Saving Service</u> Make sure home improvement touchpoints such as architects and trades persons are aware of retrofit measures and available grants Raise awareness of retrofit schemes alongside council communications including council tax bills 	<ul style="list-style-type: none"> Make it easy to find information and understand the steps involved: Direct to local authority information and support services e.g. one stop shops, web pages, telephone advice lines; direct to <u>3rd party websites for clear advice and guidance</u> Direct towards open house schemes 	<ul style="list-style-type: none"> Encourage to join an open house scheme or register on '<u>Visit a heat pump</u>' Utilise trusted messengers and previous touchpoints to continue engagement and encourage onward knowledge sharing

*Note: This row is meant as a source of ideas to be built upon. Actual messaging should be tailored to, and validated, at a local level. There are resources that can help with this on the [references and resources page](#).

House buyers

Summary

[Life moment driven] Currently in the process of buying a new home or considering doing so. May want to know how to fix issues raised in their home buying survey and EPC certificate or improve the living space in their new home before or soon after moving in. These households have already committed to a period of disruption and change so may be less sensitive to the disruption and hassle of installing retrofit measures. Likely to be comparing different mortgage deals taking into account monthly payments, interest rates and long term payback costs.



Key motivations

- They want to fix the issues raised in a home buying survey or EPC
- They want to improve the living space in the new home to better meet their tastes or to repurpose it to better meet their needs
- They want to make sure any changes comply with their mortgage conditions
- They ideally want any improvements to increase the value of their home
- They want to make disruptive changes to décor or heating systems before they redecorate and settle in

Triggers

- Looking at properties for sale online or in estate agents
- Receiving home buyer survey report and EPC certificate for the property they wish to buy
- Planning what they want to redecorate or renovate in the new property
- Green mortgage deals offered by lenders

Messengers

- | | |
|---|----------------------|
| • Peers / neighbours who have installed retrofit measures | • Estate agents |
| • Property selling platforms | • Mortgage providers |
| | • Local authorities |

House buyers

Retrofit stages	Awareness	Consideration / Decision making	Use / Advocacy
Barriers to uptake	<ul style="list-style-type: none"> Lack of information about or awareness of retrofit measures and their benefits Likely to be put off by unfamiliar or confusing terminology May not trust the EPC rating for the home they are buying due to inaccurate data modelling and predicted savings or inappropriate measures being recommended 	<ul style="list-style-type: none"> Lack of time to consider installing and funding retrofit measures as part of the often stressful house buying process Already overwhelmed by information and the complexity of the home buying process Lack of timely awareness of green mortgage deals, and uncertainty that they make <u>financial sense long term</u> 	<ul style="list-style-type: none"> Want to avoid or smooth any changes in behaviour or additional expenses resulting from installed measures Low uptake of current green mortgage deals, <u>despite growing consumer interest</u>, means that there is little advocacy for these products from family and friends
Potential messaging*	<ul style="list-style-type: none"> A green mortgage can help you fund upgrades to your home and improve your home's EPC rating 	<ul style="list-style-type: none"> Green Mortgages offer competitive rates to support energy-efficient home improvements. Reduce energy costs, enhance your home's value, and contribute to a greener future. 	<ul style="list-style-type: none"> Show it off: Showing friends and family around a new home and showcasing the changes made is common practice. Helping new households maximise the benefits from installed measures through providing timely advice, tips and help lines will encourage them spread the word
Touchpoints- How / where to engage as a local authority	<ul style="list-style-type: none"> DIY stores - Adverts on websites, informational leaflets in shops, or bespoke 3rd party services such as <u>B&Q's Energy Saving Service</u> Mortgage brokers and conveyancing solicitors Property websites and estate agents Tradespeople providing quotes Raise awareness of schemes alongside change of address letters 	<ul style="list-style-type: none"> Make it easy to find information and understand the steps involved: Direct to available local authority information and support services e.g. one stop shops, web pages, telephone advice lines; direct to <u>3rd party websites that can provide clear advice and guidance</u> Direct to towards an open house scheme or <u>'Visit a heat pump'</u> 	<ul style="list-style-type: none"> Encourage to join an open house scheme or register on <u>'Visit a heat pump'</u> Utilise trusted messengers and previous touchpoints to continue engagement and encourage onward knowledge sharing

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About us

Hi we're NEC Digital Studio.

We're a people-first digital studio, designing and developing evidence-led solutions at scale to transform the services used by everyone, every day.

We support public, private and social purpose organisations to harness the power of digital through life-centred design, data and technology, empowering them to be more effective, sustainable and inclusive.

[Visit our website](#) or [browse our Playbook](#) to learn more about how we do things and how we can work together.

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Get in touch

We'd love to hear how you've used this toolkit and if you have any feedback that will help us to improve it.

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Accessibility statement

We have endeavoured to make this document accessible to a wide variety of users but are still working on the content to make it WCAG AA standard.

Please note: You can download a condensed and print friendly version of the personas from the NEC Digital Studio website.