



The voice of the  
smart meter rollout

# Principles for public engagement in today's Britain

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# Foreword

## Sacha Deshmukh

### Chief Executive, Smart Energy GB

In *A Beautiful Constraint*, Adam Morgan describes “the beneficial power of constraint”, turning around the assumption that the challenging factors in any task, rather than holding us back, can unlock creativity and ingenuity – and become the stimulus to find a better way of doing something.

I’ve been inspired by this idea, and return to it often.

At Smart Energy GB we are undertaking the most challenging and complex behaviour change campaign of our generation. We’ve taken the advice of experts in consumer engagement, particularly from those with experience of extending the relevance of a mainstream campaign to audiences with additional barriers. In this white paper we would like to share some of our learnings.

We’re working in an area – energy – which is the very definition of ‘low interest’. Who cares, or wants to care, about the meters ticking away in dusty cupboards from Perth to Penzance? This in itself constitutes a thorny creative challenge: to engage people without amplifying the anger and frustration they often report when it comes to buying and using energy.

Smart meters are being upgraded in every home and small business across Britain – and that means mobilising not 80 per cent or 90 per cent but 100 per cent of homes to take action, in a diverse nation where nearly a million people speak little or no English or Welsh, one in ten is over 65 years old, and 17 per cent of adults have literacy levels at or below those expected of an 11 year old.

Our campaign must do everything a mainstream commercial campaign does, and more – achieving wide consumer recognition and engagement using creative vehicles and traditional media channels in an efficient and cost-effective way, and then moving beyond those audiences who are easier to reach via conventional communications channels, to vulnerable audiences who also have huge amounts to gain from digitization of energy.

Finally, we are tasked not just with bringing about a revolution in the technology we all have in our homes, but also playing our part in a revolution in energy behaviour. To fully benefit from smart meters, people need not only to have one installed but also to use it to get their gas and electricity under control. And those who have the most to gain are often people in vulnerable groups.

In meeting this challenge, it was clear to us right from the earliest days of planning our campaign that while a creative and compelling mainstream campaign was a must, we would also need to move beyond traditional media channel choices and work with trusted partner organisations around the country to engage everyone.

Our campaign is now fully underway across Britain and we're already seeing great results from our approach. We've been lucky enough to learn from other inspirational campaigns and communications experts: many of their achievements are detailed throughout this paper.

I also hope we are making our own contribution to the wider body of professional knowledge on how to engage the entirety of such a diverse nation as Britain.

I hope this white paper will provide useful insights for public engagement campaigns seeking to reach the whole of our diverse nation.



**Sacha Deshmukh**  
Chief Executive



# Chapter 1

Public engagement:  
the starting principles

Having the chance to communicate with the entirety of the nation, without the imperative to stop once a set of commercial objectives is reached, is an exhilarating opportunity. It's one faced by a range of organisations, mainly but not exclusively in the public and not-for-profit sectors, and usually involves the objective of bringing about behaviour change in service of a benefit that goes beyond the individual.

In this paper we look at the achievements of a range of successful engagement campaigns and, learning from them and from our own experiences, have set out a set of principles that any campaign seeking to energise the nation could use as a starting point to reach both mainstream and harder-to-reach groups.

**Our starting point is the set of basic principles driving any mainstream consumer engagement campaign.**

The first is to analyse the audience a campaign needs to reach. Which subset of the entire population? How many people? What do they have in common, and in which ways is the audience a diverse group?

Digital UK, for example, identified that although it needed to engage people in all communities around the country, around 40 per cent of its audience had already upgraded to digital TV at the start of its campaign. The Department of Health's Hepatitis C prevention campaign, however, targetted the South Asian community specifically.

A campaign must then make the right selection of media channels to reach its target audiences: working in multi-channels to reach individuals who interact with paid and earned media channels in an infinite number of combinations. Mainstream commercial campaigns seek to establish new relationships between individuals and brands, or enhance desirability and loyalty in existing consumer choices, and this will affect the choice of media channels. A campaign of this type could be simply about recognition of a brand, and build up awareness of a product or logo through multiple channels.

The challenge becomes more intense when the limits of traditional media channels are reached, and the return on investment in paid and earned media starts to wear out. Usually, it's at this point that a mainstream campaign assesses whether it has reached its objectives. A campaign with a wider remit around behaviour change, however, would be likely to incorporate but also move beyond traditional channels right from the start, in order to reach vulnerable audiences and to embed a societal or behaviour change message across a wider population.

The next step is the choice and design of a central creative vehicle which will work in the selected channels. This is a crucial decision for any campaign. While creative choices can be evolved and adapted over time, the initial decision requires an investment of significant time, money and creativity – and often a leap of faith, albeit well-informed and well-researched, since no campaign can pre-test enough to know for sure it will be successful once deployed with the public.

Often, the choice is of the face or faces of the campaign. Human or animal? Characters or spokespeople? If the message is about behaviour change, who or what should be deployed to bring the message to life? No individual or family can depict in its demographic attributes anything other than a subset of the population – and this is a particular challenge for a campaign seeking widespread resonance.

And how will that vehicle communicate the message of the campaign? Often, a campaign starts from humour and metaphor – the cultural shorthand shared by mainstream audiences which can make a campaign resonate. But metaphor and humour have the potential to create an additional barrier for vulnerable audiences who may already be decoding an unfamiliar language – or for whom advertising is in itself a barrier. It needs to be used carefully when extending the reach of a mainstream campaign to harder to reach audiences.

We expand on these principles in section 2, and start by examining the major differences between campaign audiences for mainstream and public engagement campaigns, what campaigns targeting vulnerable audiences can learn from the very best of mainstream campaigns, and the different nature of the challenges facing them both.

### 1.1 How do public engagement campaigns use the best principles underlying mainstream commercial marketing campaigns?

Public engagement campaigns are differentiated by their objective rather than by the type of organisation engaged in them. There are examples of commercial entities seeking to engage the public, especially vulnerable groups – the British Banking Association’s campaign to raise awareness of the risks of fraud and financial abuse among vulnerable audiences is one<sup>1</sup>, and the alcoholic drinks industry’s longstanding voluntary commitment to feature messaging from the Drinkaware campaign in commercial advertising is another<sup>2</sup>. Commercial objectives usually, in these cases, sit alongside efforts to engage vulnerable audiences.

Public engagement campaigns are typically characterized by a particular set of objectives:

**The need to bring about behaviour change**, such as wearing a seatbelt in the back seat of the car, which runs contrary to ingrained attitudes and habits<sup>3</sup> or must stop people from doing something (an inherently more difficult challenge, as grappled with by the ‘SmokeFree’ campaign).

**The need to engage the entirety of a population**, including communities who will not be reached by a mainstream campaign, either because of a language barrier or another potential barrier. Digital UK’s task to ensure that everybody in the UK had upgraded to digital television, for example, needed to reach those with vulnerabilities, such as being over 75 or having a disability<sup>4</sup>.

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1 BBA, 2016 pp. 30-32

2 Portman Group, 2013 p.24

3 Richard Storey in Lannon et al, 2008 pp. 13-14

4 Digital UK, 2012

**The need to reach a subset of the entire population** which by its nature is difficult to reach. The Department of Health's Hepatitis C prevention campaign targeting the South Asian community, for example, needed to reach new migrant and first generation South Asians, who were likely to have additional language requirements<sup>5</sup>.

**The need to bring about wider benefits for society** via changing specific attitudes or behaviours, where the benefit of that change in behaviour is to wider society and public finances rather than exclusively to the individual. The challenge here is for the public engagement campaign to use the link between an individual's behaviour choices and a wider public benefit in a way which is motivating and inclusive.

If we compare these to the objectives usually characteristic of commercial campaigns, the challenges become clear. Commercial campaigns typically seek a particular purchasing decision rather than wider behaviour change. These decisions usually modify or substitute an existing habitual decision, such as buying a similar product from a competitor, rather than constituting a new pattern of behaviour. And the new decision can be taken by any member of the wider population in order for the campaign to have delivered on its objectives; meaning that a campaign can be designed to reach those who will be easiest to reach, rather than those who might face additional barriers to engagement.

## 1.2 What do we mean when we talk about vulnerable audiences?

Any campaign engaging vulnerable audiences faces an initial challenge: just as there is no one model of public engagement with vulnerable audiences, there is no one definition of vulnerability – and the term itself can even be considered pejorative or a barrier to self-identification<sup>6</sup>.

A consensus exists in favour of broad and flexible definitions of vulnerability, rather than specific identification of particular audiences.

Ofwat, for example, found in its most recent vulnerability focus report that stakeholders believe that specific categorical definitions are not useful as they prevent companies from responding with operational flexibility<sup>7</sup>.

Ofgem, too, has recently adopted a flexible, specific needs and outcomes based definition over a categorical one<sup>8</sup>, setting out in its Consumer Vulnerability Strategy that:

“we have defined vulnerability as when a consumer's personal circumstances and characteristics combine with aspects of the market to create situations where he or she is:

- significantly less able than a typical consumer to protect or represent his or her interests in the energy market; and/or
- significantly more likely than a typical consumer to suffer detriment, or that detriment is likely to be more substantial<sup>9</sup>”

5 Saraf, 2010 p.1

6 Citizens Advice, 2014 in Ofwat, 2016

7 Ofwat, 2016

8 Ofgem, 2016

9 Ofgem, 2013



Citizens Advice agrees, stating that “society is not divided between ‘vulnerable consumers’ and the rest. In reality consumer vulnerability can be a fluid state that affects people at different times in their lives or it can be long term in effect. It may be triggered by events such as loss of a job, the onset of disability, or becoming a carer for example<sup>10</sup>.”

It’s clear that broad definitions can’t deliver the insight that campaigns need if they are to make fully informed choices around the right strategies and tactics to reach everyone, including vulnerable groups. So, there is a practical option – to be aware of broad definitions, but then to identify those potential barriers to engagement that are relevant to the task in hand.

In our own campaign, Smart Energy GB has looked at a wide range of definitions of vulnerability<sup>11</sup>, but needed a framework to identify the characteristics and circumstances relevant to our task. So, we conducted a thorough process, including a consultation, to identify the specific characteristics and circumstances which may present additional barriers to realising the benefits of smart technology.

The resulting paper, *Smart energy for all*<sup>12</sup>, looked at a broad range of characteristics and asked which could present a barrier at the various stages of the smart meter journey. It identified the ‘additional barrier’ audiences which are right for Smart Energy GB – including groups which are frequently considered vulnerable in other circumstances, such as blind and partially sighted people and people who cannot speak

English or Welsh proficiently, and others which face additional barriers specifically in relation to the smart meter journey who might not be considered vulnerable in other parts of their life, such as being a tenant in private accommodation.

Organisations tasked with public engagement can interrogate broad definitions of vulnerability, taking on board the views of stakeholders with deep understanding of their target groups. This will enable them to identify the engagement campaign approach which is right for their task, makes best use of public funds and reduces ‘wastage’ in their campaign, avoiding the risk of targeting groups who are considered vulnerable in the generality but might not face additional barriers in connection with the task in hand.

### **1.3 What particular challenges do public engagement campaigns face when extending their campaign to reach everyone, including vulnerable audiences?**

Vulnerable audiences are typically the hardest to reach. People in vulnerable audience categories tend to be less engaged with traditional media categories, are likely to engage in less economic activity, and as a result tend to behave as a consumer with less confidence. This requires creativity and a particular choice of media channels to extend the reach of a mainstream campaign to all – some of which may require additional resources in order to be effective.

<sup>10</sup> Citizens Advice, 2014

<sup>11</sup> Various relevant organisations, including Ofgem, energy suppliers and the Smart Meter Installation Code of Practice (SMI-CoP) have a definition of vulnerability relevant to their operational aims

<sup>12</sup> *Smart energy for all*, Smart Energy GB 2015, available at <https://www.smartenergygb.org/en/-/media/SmartEnergy/essential-documents/essential-documents/english/Smart-Energy-For-All.ashx>



Commercial campaigns may choose to halt their activities once their mainstream campaign targeting a broader audience starts to produce diminishing 'returns' on investment. This tendency creates a relevance problem: vulnerable audiences are more likely to assume that advertising is not relevant to them, and are consequently less likely to listen and engage<sup>13</sup>.

Campaigns specifically targeting vulnerable communities will view that 'return on investment' in a different way: in human terms, around worth, benefit and quality of life. This doesn't mean that financial objectives are unimportant, but it does mean that additional investment and ingenuity may be needed to reap a wider societal and financial benefit.

**It can, therefore, be challenging to persuade vulnerable audiences to take specific actions on seeing a campaign.**

There is sometimes a correlation between groups which have not yet engaged with a campaign by taking action, and vulnerabilities. Audiences with vulnerable characteristics strongly over-indexed among the 10 per cent analogue-only households remaining in the final switchover areas in 2012<sup>14</sup>, for example – and smokers in lower socio-economic groups are more habitual in their choice, and harder to reach via conventional media<sup>15</sup>.

Wider evidence suggests that when considering a potential change in behaviour, vulnerable audiences can be more likely to resist it, and frequently have other practical or social concerns attached to making the change. The DWP with COI<sup>16</sup> identified a range of barriers amongst the target audience of the 'Direct Payment – Giving it to you Straight' campaign, including practical concerns around skills (such as managing a bank account) and social concerns about the impact of change on existing habits and relationships.

This places an onus on any organisation seeking to reach vulnerable audiences to speak directly to them, and thus understand the quality of their current experience and the barriers to them responding to a campaign's messages.

**This is because there are practical barriers to both reach and response particular to vulnerable audiences.**

Smart Energy GB has examined the need to communicate to sections of the population who (for a variety of practical reasons, e.g. disability) are least likely to be able to receive the message via certain channels, comprehend the message if seen, or respond to it through taking action<sup>17</sup>.

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13 Digital UK, 2012 p.10

14 Digital UK, 2012 p.7

15 Waters, 2010 p.2

16 Nairn and Kelly, 2008 pp. 1-3

17 Smart Energy GB, 2015 pp. 44, 50, 57, 58, 69

Having a particular physical or cognitive impairment is often a potentially vulnerable characteristic which in itself presents a practical barrier to effective engagement, such as severe or profound deafness or a learning need. These require alternative creative design and channel selection. Reliance on English and Welsh, for example, will not reach the million adults in Britain who do not speak these languages proficiently.

And creative design must bear the unique needs of each audience in mind: for example, people with a learning impairment may struggle to decode text formatted at a standard adult reading age, and people with a memory impairment may require more information, context and/or repetition than mainstream audiences.

This challenge is compounded by the message for those groups sometimes being more complex than that for a mainstream audience – for example, around congestion charging<sup>18</sup>, where particular vulnerable audiences needed to know how they could claim exemptions to the charge (e.g. for physical disabilities).

Beyond physical and cognitive impairments, an inability to speak English or Welsh to a proficient level can be a vulnerable characteristic. According to the 2011 census, there are 863,000 individuals in this category<sup>19</sup>: and there is often a considerable overlap between this group, and BAME communities.

Such groups may, because of the barriers to them engaging with mainstream commercial campaigns about new technologies, lack a degree of technical understanding

and may require less complex messaging or analogous creative, such as the role of Digit AI in Digital UK's campaign<sup>20</sup>.

**Campaigns which seek to be relevant to vulnerable audiences often contain benefits for wider society as well as individuals.**

Public engagement campaigns share an objective to produce changes in behaviour which generate wider public benefits. This means that such campaigns must prompt behavioural change where there is either no personal reward, or a cost attached to non-compliance. Congestion charging and recycling<sup>21</sup> are two examples where an action or cost on the part of an individual brings about no individual benefit – or, a benefit which is publically shared with all rather than specifically to the individual. WRAP has shown that recycling rates are lowest amongst vulnerable groups.

The challenge of engaging an individual to take action in service of a societal benefit is one faced by all behaviour change campaigns. However, overcoming this challenge may be considerably more difficult with vulnerable audiences. Vulnerable audiences may be even less motivated by the public benefit of a change in their personal behaviour due to their lower likelihood of being economically active, be unfamiliar with the action they are being invited to take, and may even face a higher personal cost for compliance than faced by mainstream audiences.

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<sup>18</sup> Garrard S. and Baker, C., 2004, p.1

<sup>19</sup> ONS, 2015

<sup>20</sup> Digital UK, Thoren & Reeve 2012, p.1, 14

<sup>21</sup> WRAP, 2014 p.3

## Chapter 2

What principles can campaigns which wish to reach vulnerable as well as mainstream audiences use to overcome these challenges?

## 2.1 Tailor the format of the campaign creative to reach everyone

Vulnerable audiences are less likely to regard engagement campaigns as relevant to them when they do not see a campaign as reaching out to them as individuals<sup>22</sup>. For example, people aged 75 and over are less likely to buy products where marketing does not directly relate to and engage them<sup>23</sup>.

The format of campaign materials can be tailored and provided in alternative formats or translations, in order to overcome particular impairments and barriers.

Campaigns have successfully driven relevance by adopting specific visual styles and text which explicitly address the audience in question, working with expert partners who can bring expertise in format and creative development for specialist audiences.

For example, Digital UK worked with partners such as RNIB and Mencap to produce creative for audio-led channels for those who are blind or partially sighted, creative for text-led channels for those who are severely or profoundly deaf, and storybook-style creative for those with mental health disabilities<sup>24</sup>.

In Smart Energy GB's own campaign, we have used an inclusive upweighting approach to adapt the campaign for specific audiences, and are currently working with the British Institute of Learning Disabilities to develop easy-read versions of key campaign materials.

Whilst advertising campaigns targeting mainstream audiences are often adept at using metaphor and analogy as a cultural shorthand which can be easily understood by audiences used to being communicated with via the medium of advertising, a different approach should be taken with vulnerable audiences. Aligning visual imagery and messaging in a clear and literal way can be key to ensuring vulnerable audiences are willing (and able) to pay attention.

However, it is difficult to communicate in a compelling way without any metaphor at all – so where visual analogies are used, they should be chosen so as to create as few steps to understanding as possible. For example, Stroke Awareness used the symbolism of a flame burning inside a person's head to visually represent the damage caused by stroke. This aided memorability and increased the impact of the creative<sup>25</sup> without setting up an additional barrier to understanding.



<sup>22</sup> Digital UK, 2012 p.5

<sup>23</sup> Age UK 2010, quoted in Smart Energy GB, 2015 p. 42

<sup>24</sup> Digital UK, 2012 p.11

<sup>25</sup> Snow et al, 2010 p.6

Recognising that metaphor and/or analogy can raise barriers to comprehension and action for some vulnerable audiences, the friendly 'Digit AI' robot was designed to visualise help across all of Digital UK's key executions<sup>26</sup>. But this vehicle was used in different ways across the campaign, to ensure it was a useful vehicle for both mainstream and vulnerable audiences.

In mainstream executions, Digit AI travelled the length and breadth of the UK as a symbol of the progressing digital switchover. However, in Help Scheme executions (targeted at vulnerable audiences) and for ethnic audiences, Digit AI's role was modified, becoming the presenter of clear and simplified information in relevant non-English and non-Welsh languages where needed<sup>27</sup>.

Digital UK also found that entertainment and humour can cloud the messaging: elderly audiences were less likely to properly decode or pay attention to advertising messaging which relies heavily on entertainment or humour<sup>28</sup>.

Saying it and showing it can help drive the message home and inspire action: this strategy was developed by DLKW Lowe to help the Stroke Awareness campaign reach older audiences. The "say it and show it" approach incorporates clear, straightforward messaging, in this instance the FAST acronym, alongside consistent and highly memorable visual imagery, in this instance a visual representation of the symptoms of stroke, aligned to the acronym<sup>29</sup>.

Materials should be translated for those who cannot speak English or Welsh proficiently, and targeted to ethnic media to generate relevance and efficiently targets the audience in question. This has been used successfully in for example the Hepatitis C Asian campaign<sup>30</sup>. Digital UK used 10-50 different languages depending on the area<sup>31</sup>, and Smart Energy GB's campaign has been translated into the languages of the 5 largest non-English speaking populations in Great Britain, and placed in ethnic minority media.



26 Digital UK, 2012 p. 9

27 Thoren & Reeve, 2012, p.14

28 Digital UK, 2012 pp.11-12

29 Snow et al, 2010 p.5

30 Saraf, pp. 8-11

31 Digital UK, 2012, p.11

Although there are few Welsh speakers who do not also speak English, use of the Welsh language can establish credibility amongst various audiences with vulnerable characteristics in Wales, and potentially assist with comprehension for some audiences with vulnerable characteristics (e.g. older audiences). Campaigns which translate into Welsh should do this whilst avoiding any impression that speaking Welsh is inherently related to vulnerability.

## 2.2 Select appropriate channels for both reach and message - moving beyond traditional media channels where needed

Vulnerable characteristics can present both barriers and opportunities to a public engagement campaign. Certain channels may be ruled out as inappropriate for reaching and/or delivering information to certain audiences: others may provide an enhanced probability of reaching and/or delivering information to the audiences in question.

Certain channels are automatically inappropriate – e.g. radio for those who are severely or profoundly deaf. The issue here is one of practicality, so above all, select channels which are practical for reaching audiences identified as relevant at the start of the campaign. The task here lies more in identifying which audiences are relevant, and ensuring media consumption information is up to date and correct.

Where appropriate, traditional media can offer an enhanced probability of reaching certain audiences. Older audiences, for example, over-index on TV viewing<sup>32</sup> and this channel was used extensively by Digital UK to reach various vulnerable audiences with the Help Scheme executions.

Stroke Awareness took a similar approach to reach a primarily elderly target audience, alongside print to deliver supporting information<sup>33</sup>.

Multi-channel campaigns are an effective way of breaking information up into ‘bitesize’ chunks for those who find it difficult to grasp complex messaging, by providing a degree of repetition, which may aid those with various impairments<sup>34</sup>.

Digital UK chose to combine traditional media (e.g. TV & press), with direct mail and leaflet options. Copy and messaging between touchpoints was complementary, with content and imagery tailored to the channel<sup>35</sup>.

However, traditional media channels will often need to be supplemented with non-mainstream and even non-media channels if a campaign is to reach vulnerable audiences.

We’ve examined in this paper some of the reasons behind the challenges of engaging vulnerable audiences. In particular, the general tendency of mainstream and commercial campaigns to cap their spend at the point where diminishing returns set in means that people who aren’t used to being targeted ‘switch off’ when it comes to advertising and communications in mainstream channels, assuming that messages aren’t for them.

32 Smart Energy GB, 2015 p. 42, 46 etc

33 Snow et al, 2010 pp.5-6

34 Lannon et al, pp.77-78

35 Digital UK, 2012 pp.14-22



This means that when it comes to these audiences, campaigns in mainstream channels – even if carefully targeted and adapted, as set out in this paper – might not get a campaign all the way home. Non-traditional channels to these audiences, including non-media channels, must be brought into play.

Direct Payment successfully used hyper-local channels, such as local press and community outdoor, in places such as bingo halls<sup>36</sup>. Digital UK used granular media and PR at a local level, including messaging on library bookmarks, pharmacy bags and hyper-local media relations<sup>37</sup>. The Department of Health's Stroke Awareness campaign utilised TV and print advertising, but supplemented this with a community outreach programme to reach vulnerable and target ethnic minority groups, including social housing newsletters and phoneboxes<sup>38</sup>.

### **2.3 Work with partners, both to reach the hardest-to-reach audiences and to build wider trust in your message**

Digital UK, Stroke Awareness and Direct Payment show us how a campaign can extend its reach through using non-traditional media channels. However, there is a point beyond which media channels, even non-traditional ones, can do no more when it comes to engaging vulnerable audiences.

Even the advice of nationally-renowned expert or celebrity voices tends not to resonate with vulnerable audiences, whose sphere of relevance and movement tends to be smaller and more personal. There are voices who they trust as guides, but those guides tend to be people and organisations they know and have a personal relationship with.

This is why Smart Energy GB, from our very earliest stages of campaign planning in 2013, identified a programme of marketing partnerships with trusted, often hyper-local, organisations, as a pillar of extending the reach of our campaign to vulnerable audiences.

We identified that, in many cases, conventional paid for media channels would work well for vulnerable audiences as well as those without additional needs. However, we also anticipated that we would need to upweight communication in some channels. We established early on that organisations would be valuable in helping us reach vulnerable audience groups who are harder to reach or engage through conventional media<sup>39</sup>.

Selected marketing partnerships can offer great advantages for a public engagement campaign, especially when it comes to reaching the hardest audiences. The presence of the partner (either physically or via co-branding) can be tool to help build trust, comprehension and change behaviour amongst vulnerable audiences.

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<sup>36</sup> Nairn & Kenny, 2008, p.3

<sup>37</sup> Digital UK, 2012, p.21

<sup>38</sup> Snow et al, 2010 p.5

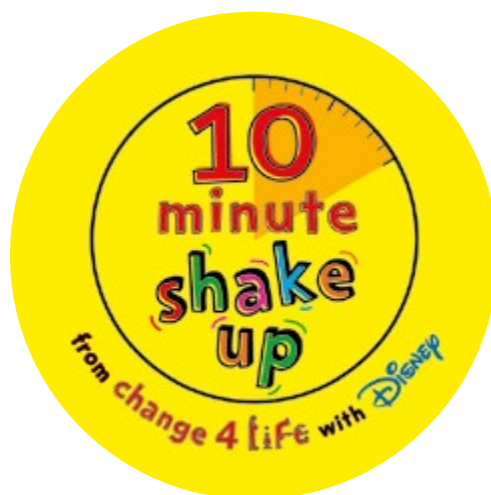
<sup>39</sup> Smart Meter Central Delivery Body, 2013, p60



Partners who we have worked with to reach a wide range of communities include the British Institute of Learning Disabilities (BILD), the National Housing Federation, Age UK, the Scottish Federation of Housing Associations, Community Housing Cymru and Citizens Advice (England and Wales).

As well as establishing trust, partners can also provide a direct and trusted route to vulnerable audiences to supplement traditional media channels, for example in disseminating campaign materials in alternative formats. To do this effectively, an open-source approach to brand assets is important: we have learned a lot from the approach of Digital UK, which worked closely with its various partners to maximise reach and to help develop communications materials<sup>40</sup>.

Partner organisations can be commercial entities as well as charities. Smart Energy GB has partnered with PayPoint to engage hard-to-reach prepayment energy customers via their till receipts, reflecting our insight that prepayment customers tend to keep their receipts as proof of purchase and as a record.



Change4Life has also used open source branding with both commercial and non-commercial partners to increase public participation, generate wide reach and increase the salience of healthy living to deliver behavioural change amongst the hardest to reach audiences<sup>41</sup>. This open source approach stimulated an extraordinarily rich mix of local activities, including Change4Life themed assemblies and lessons, and demonstrated partner organisations' desire to adopt Change4Life visual codes to add credibility and momentum. The coverage it generated would have required a £1.8m poster campaign to achieve commercially, and had a significant impact on how people interacted with the campaign: 21 per cent of those who had high visibility of community-generated Change4Life materials passed information onto their families and friends, in comparison with eight per cent of those who had had low visibility of the community-generated campaign.

<sup>40</sup> Digital UK, 2012, pp.10-11

<sup>41</sup> Storey, 2010 pp.6-7 & various

## 2.4 Tailor your measurement and evaluation to your audience, as well as your campaign

When a campaign is tailored to go beyond the mainstream, so too must the techniques used to measure and evaluate its impact. The challenges and the practical barriers faced by campaigns seeking to engage vulnerable audiences will also be present when that campaign seeks to evaluate the impact of their campaign.

Public engagement campaigns are typically funded by consumers' money, and this will be a factor in deciding how to evaluate. Transparency and ensuring value for money will be essential: however, spending a disproportionate amount on evaluation in relation to the overall campaign budget might be fully comprehensive, but would not constitute the best use of public funds.

An established benchmark, followed for example by Digital UK and Public Health England, is to spend in the region of five per cent of a campaign's execution budget on measurement and evaluation. Public engagement campaigns should consider a wider range of measurement and evaluation techniques than the mainstream advertising tracker tools employed by commercial campaigns, for example considering those in harder to reach groups are more likely not to have personal internet access. They should consider offline as well as online quantitative research techniques (although in some cases these may carry a disproportionate cost).

Conversely, secondary research which identifies insights gathered previously by other campaigns or from academic sources can be deployed to good effect, in particular to glean broad insights about the communication preferences of certain groups, as an alternative to conducting primary research from scratch.

Qualitative research, for example via focus groups, should be considered, but so too should the potential barriers to this being fully productive. It is more difficult to recruit and assemble research subjects from vulnerable communities, who may have difficulties with travel or a less regular daily schedule, and the topic of research may be less appropriate to explore in-depth within a focus group environment, for example if the campaign is connected to audience's personal finance, health or behaviour.

The speed at which a campaign is seeking to achieve its objectives will determine the frequency at which a campaign should evaluate. A test and learn approach is especially important with additional barriers groups, to constantly refine messaging and evolve it as awareness grows, and ensure that a campaign is ruthlessly self-challenging, in particular over the effectiveness of the creative vehicle at the heart of any campaign and the appropriateness of channel selection for particular groups over time.

## Top Principles for Public Engagement

We hope public engagement campaigns will use and benefit from the model of public engagement for all as shown in our ENGAGE circle - and return to it over time as their campaign takes shape and starts delivering.

The blue segments are common to any public engagement campaign: namely the choice of the central creative vehicle, selection of appropriate channels, and measurement and evaluation completing a circle of feedback and adaptation of the campaign and its chosen channels over time.

The green segments are additional steps for campaigns seeking to engage vulnerable audiences in addition to the mainstream.

Smart Energy GB has taken this model as its starting point. During the first part of our campaign development, we analysed our audiences, including those with additional barriers, and identified the characters of Gaz & Leccy as our central creative vehicle. They were the right choice for us as they gave the potential for adaptation in non-mainstream channels and translation into different languages, and bring to life in a clear and simple way the idea of energy being out of control in a way that works in radio, TV and print.

We then defined 'vulnerability' in relation to our task of energising and informing the nation about smart meters, through our consultation on *Smart energy for all*, the results of which are published on our website.

As we moved quickly into the execution phase of the national campaign, we upweighted our campaign creative in mainstream channels for specific 'additional barrier' audiences, and supplemented these channels with non-traditional communications tools, including a partnerships programme which built capacity and knowledge among the charities and other organisations which support and give advice to audiences with additional barriers.

Our measurement and evaluation programme was tailored to go beyond the mainstream. It is a level of insight activity proportionate to the scale of our task, giving us an ongoing view of how messages are resonating with specific groups as well as a big picture over time of understanding of key smart meter benefits and propensity of consumers to have their meter upgraded. It has given us the finely-grained insight we need to close the strategic loop and reassess how our central creative vehicle and channel selections should evolve as the campaign moves forward year by year.

## ENGAGE circle



### Steps for all campaigns

Steps for campaigns seeking to engage vulnerable as well as mainstream audiences

## Chapter 3

Conclusion:  
a beautiful constraint?

This paper has examined the considerable challenges faced by public engagement campaigns seeking to engage both mainstream and vulnerable audiences, and suggested some principles that campaigns can consider bringing into play.

Overcoming these challenges requires a campaign which is memorable and salient, well-targeted, flexible enough to integrate with appropriate trusted partners, able to extend into non-traditional media and even beyond media channels, and designed to work effectively with every audience, especially those who need to hear the message most.

In short, an effective public engagement campaign which successfully engages vulnerable audiences will be one which by its very nature is able to reach everyone - not just the least vulnerable. A campaign which engages vulnerable audiences will by definition be able to reach everyone.

The very challenge of communicating to vulnerable audiences, reaching beyond traditional choices and mainstream creative solutions, could be the 'beautiful constraint' which, when seen as an asset and not a barrier, can inspire a campaign to succeed for all.

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