

# DECC Consumer Panel (1058-08-2015)

TNS BMRB proposal



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# 1. Introduction

The Department of Energy and Climate Change (DECC) wishes to implement a consumer panel which will provide its policy teams with flexible, rapid and cost-effective access to a cross section of consumers for a range of small scale insight projects. The panel will deliver a blend of a 'traditional' panel function and a call-off contract function that delivers a succession of consumer insight projects as and when required. The implementation of the panel, and related research, will allow DECC to gain direct feedback from consumers as it develops and tests new policies.

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The remainder of our proposal is structured as follows:

- Chapter 2 sets out our understanding of the research requirements. This includes the background and policy context to the research, key objectives for the consumer panel and how we will add value.
- Chapter 3 outlines our approach to management and delivery. This includes a detailed delivery plan, working arrangements, quality assurance and an overview of responsibilities across our team.
- Chapter 4 outlines the skills and experience of our proposed research team, our expertise against the range of methods that may be required and relevant operational and organisational capabilities and experience.
- Chapter 5 sets out what we see as the key challenges and risks in developing and delivering the panel.
- Chapter 6 covers our proposed approach and rationale to first setting up the panel and conducting the three example research projects included in the ITT. We also outline our proposed approaches to analysis and reporting.
- Chapter 7 includes our pricing schedule, in the template provided in the ITT.
- Appendices are included for staff CVs, a risk register, additional information on Lightspeed GMI, details on our qualitative recruitment, example infographics and our quality control and information security procedures.

We have structured our proposal in line with the format outlined in the ITT. Some points are covered in more than one section; where this applies we have signposted where further information can be found. As specified in the ITT, we have limited our proposal to 30 pages, excluding cover and contents pages, price schedules, declarations and appendices.

## 2. Understanding requirements and adding value

### 2.1 Background to the research

As part of the Civil Service Reform plan published in 2012, the Civil Service made clear its commitment to introducing Open Policy Making. As part of this new approach the Civil Service would take a more collaborative approach in which policy is drawn based on a much wider range of inputs and approaches. The move towards Open Policy Making is focused around three main strands:

- **Expanding the range of people engaged in policy making:** Involving a wider range of people will ensure that policy making does not become too narrow or focused within Whitehall. Drawing on the knowledge of external experts, as well as the views of the general public, at all stages of policy development will therefore be a key part of the policy making process going forward.
- **Using the latest analytical methods:** Making use of more advanced techniques such as behavioural economics, data science and social media analysis. Newer techniques such as these help to better understand the implications of new policy in a way that has not been possible before.
- **Taking a more iterative approach to implementing policy:** Taking an approach of continuous improvement throughout policy development, techniques such as prototyping, scenario modelling, and randomised control trials allow policies to be tested more thoroughly than ever before they are implemented.

Open Policy Making is an area which DECC is keen to embed further within its decision making processes. The first of the three strands mentioned is particularly important in this sense, as wider engagement with the general public is key for DECC in achieving their aims. Much of DECC's policy requires the public to embrace changes in the way they access and consume energy. Without extensive public engagement and an understanding of how to change behaviours, these policy aims would be difficult to achieve. Through Open Policy Making DECC can understand their consumers better than ever and make more informed, evidence based policy choices.

As a means of attaining wider engagement with the public on policy decisions, DECC wishes to implement a consumer panel. The consumer panel will consist of a 'community' of consumers, who will act as a rapid access sample source for a variety of bespoke projects. The creation of this panel fits well with the Open Policy Making approach, as consumers can be accessed within short timescales for their input into policy decisions.

There are a number of reasons why the consumer panel is suited to DECC's requirements. Particularly important is the access that it provides to various groups within society. By profiling a large 'community' of people to start with, DECC will be able to access consumers in a variety of ways, ranging from nationally representative samples, to very low incidence groups such as those not on the gas grid, or vulnerable/fuel poor respondents. The initial profiling exercise also means that those with particular attitudes towards certain DECC priorities can be easily accessed for follow-up research. Being able to access this range of groups quickly is a feature of this design which could not be replicated through other methods. The use of a panel also means that public input will be available at various stages in the process. For example, the faster access to consumers would mean that a co-creation workshop could be set-up quickly to aid the initial policy design stage. Input from consumers would be available at all stages of policy development, through to pre-implementation.

Creating a 'community' in this way will also save significant time on individual projects, as a procurement process will not be needed each time. The early development of policy often necessitates fast access to consumers, so avoiding the procurement of individual projects is an invaluable aspect of this methodology. Smaller, fast turnaround interactions with consumers will be possible within very tight timescales.

Overall the creation of a consumer panel will enable DECC to fully embrace the use of Open Policy Making, via fast, cost-effective access to a range of consumers.

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## 3. Management, delivery and capacity

### 3.1 Delivery plan

We confirm that we can meet the required timings. This covers:

- Ensuring the panel is operational with initial profiling completed by mid-late October 2015
- Readiness to conduct the first project by late October/early November 2015
- Ability to conduct up to three projects per month
- Delivery of findings from all projects within one to three months of inception

We include a timetable below to cover the initial inception, panel set-up and profiling stages (Table 3.1). Indicative timetables for the three example projects outlined in the ITT are also included (Tables 3.2, 3.3 and 3.4)<sup>1</sup>. Our proposed approaches to undertaking these projects are included in Chapter 6.

**Table 3.1: Timetable for inception, panel set-up and profiling stage**

Activity	Responsibility	Timing
Contract inception meeting	DECC, TNS BMRB	30 <sup>th</sup> September 2015
Contract award	DECC	2 <sup>nd</sup> October
Two-page project plan submitted	TNS BMRB	w/c 5 <sup>th</sup> October
Approach agreed for developing community (sub-panel) of consumers from Lightspeed GMI panel	TNS BMRB, DECC	w/c 5 <sup>th</sup> October
Quality assurance plan delivered to DECC	TNS BMRB	w/c 5 <sup>th</sup> October
Questionnaire agreed for initial profiling survey	TNS BMRB, DECC	9 <sup>th</sup> October
First weekly update sent to DECC's project manager <sup>2</sup>	TNS BMRB	9 <sup>th</sup> October
First weekly catch-up by telephone between TNS BMRB's and DECC's project managers <sup>3</sup>	TNS BMRB, DECC	w/c 12 <sup>th</sup> October
Questionnaire scripted	TNS BMRB	12 <sup>th</sup> – 14 <sup>th</sup> October
Initial profiling survey – data collection	TNS BMRB	w/c 12 <sup>th</sup> and w/c 19 <sup>th</sup> October
Summary report on panel set-up and profiling submitted to DECC <sup>4</sup>	TNS BMRB	w/c 26 <sup>th</sup> October

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<sup>1</sup> For illustrative purposes we have assumed that these projects will commence in November 2015, January 2016 and March 2016 respectively. We have allowed a period of 2-3 months for each project; however, this can be adapted based on DECC's requirements and deadlines.

<sup>2</sup> To be sent on a weekly basis thereafter.

<sup>3</sup> To be held weekly during the initial two months and fortnightly thereafter.

<sup>4</sup> This will include confirmation of the number of consumers to complete the profiling questionnaire (i.e. the sub-panel) and headline results for key profile questions.

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### 3.2 Approach to managing the contract

The success of the consumer panel will depend on dedicated input from experienced researchers and regular communication between all parties involved. At TNS BMRB we take very seriously the issue of client liaison and work hard to ensure that we earn our clients' trust and respect, as a pre-requisite to developing and maintaining close working relationships. Accreditation to recognised industry standards verifies that we meet the set standards for quality assurance, project management, data collection, preparation and processing. We will work closely with DECC to provide the responsive and flexible service that will be required for a contract of this nature, including through the following measures:

- We will provide one named point of contact **REDACTED** through whom all enquiries can be filtered.
- The contract will be overseen by **REDACTED** who also leads our work on DECC's Public Attitudes Tracker.
- We will have ongoing contact with a specific account manager working for Lightspeed GMI, who also leads on our work for the Food Standards Agency Panel **REDACTED**

- We will attend an inception meeting with DECC at the outset of the project to agree roles and responsibilities, the approach to panel set-up and profiling and working arrangements for future projects.
- We will draw up a detailed inception timetable for sign-off by the DECC project manager during the inception period (based on the timetable included in this chapter).
- We will also provide DECC with a detailed risk register during the inception period, based on the version included in our proposal (see Appendix B).
- Our Project Manager will send detailed updates to DECC's project manager on a weekly basis over the course of the contract.
- We will hold regular catch-up calls with DECC's project manager – weekly during the first two months of the contract and fortnightly thereafter. These calls will be led by our Project Manager, with other staff included as and when required.
- On a monthly basis we will provide written updates summarising work completed, upcoming tasks and milestones, and risks/contingencies.
- We will deliver a project plan for the inception stage (covering panel set-up and initial profiling) during the first week of the contract.
- For any projects proposed by DECC we will submit a delivery plan within one week. This will include our proposed approaches and details of which members of our team will be responsible for delivering the projects. All research tools and sampling methodologies will also be sent to DECC for review and sign-off.
- We will hold regular internal catch-up meetings both between members of our research team and with colleagues in operations and support teams (including Lightspeed panel management, scripting, data processing and recruitment). This will ensure that all staff are aware of upcoming activities and their role in delivering the work.
- As outlined in section 3.3 we will establish a large team of researchers to offer the resource, expertise and flexibility required to ensure successful delivery of projects.

Beyond formal levels of communication, we believe regular informal communication is vital to any project and anticipate ongoing communication taking place by phone and email as and when required.

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### **3.5 Quality assurance**

TNS BMRB demonstrates commitment to quality and information security by defining, promoting and supporting processes that are designed to continually improve performance and increase efficiency, satisfy our clients, and ensure that the required information security controls are in place.

We confirm that any activities undertaken by TNS BMRB will comply with the DECC Code of Practice for Research and (if applicable) the Code of Practice for Official Statistics. We place great importance on quality assurance and will put in place the following measures to ensure delivery to the highest possible standard:

- We have conducted a full risk assessment to ensure all parties will be aware of upcoming risks and mitigating actions (see Chapter 5 and Appendix B).
- We will provide DECC's project manager with regular updates on progress throughout the contract/projects and upcoming tasks (with flags showing where DECC input is needed) to ensure key timings are met.
- We will conduct extensive checks on survey instruments and materials prior to sign-off.
- We have a range of measures in place to ensure the quality of our Lightspeed GMI panel. This includes using a wide range of recruitment sources, comprehensive verification processes during recruitment and measures to detect fraudulent respondents during registration. Information on these processes is included in Appendix C.
- All outputs delivered to DECC will be reviewed and signed-off by a senior member of our quantitative or qualitative research team (as appropriate) prior to delivery.
- Other members of the TNS BMRB team – not specifically working on projects – will be available to review and sign-off deliverables when required.
- We will ensure that all outputs are provided to DECC in a format that is non-disclosive.
- We will ensure that all appropriate regulations are adhered to regarding safe storage and transfer, compliant with DECC's requirements for the processing of restricted data.

Much of our survey work involves the validation and management of personal level data from large-scale surveys. We take the issues of data protection and information security very seriously and have excellent security controls that integrate our data and network security policies and procedures with the security requirements of our clients. TNS BMRB is compliant with ISO 27001 – the international standard for data security and the UK Data Protection Act 1998. We abide by professional codes of conduct established by the Market Research Society and Social Research Association, to ensure that all data is kept strictly confidential.

Full details of our quality control procedures (including the standards we adhere to) are included in Appendix G, with further detail on quality and information security in Appendix F.

#### 4. Skills and expertise

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#### **4.4 Overview of the TNS BMRB team**

We offer a large and experienced team to undertake projects commissioned as part of this contract. This will ensure both that we have extensive resource to draw on at all times and that we offer substantial expertise in relation to policy areas and research methodologies.

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All projects will be assigned a team of researchers, based on the specialisms needed to undertake the work. The number and seniority of staff involved will depend on the scale and complexity of the project; however, we envisage that all projects will include a Project Director, a Project Manager and a Project Executive. The Project Director will attend client meetings, and be involved in all aspects of the research process from start to finish, including sign-off of all client deliverables and quality assurance throughout. The Project Manager will be responsible for day-to-day management of the project and act as DECC's main point of contact. The Project Executive will be responsible for the day of day monitoring of project progress and supporting the Project Manager. The table below includes all members of our proposed team, whether they specialise in quantitative or qualitative research, their research grade and their proposed role for projects commissioned under this contract. Short CVs for each member of our team are included in Appendix A.

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## 6. Proposed approach and rationale

In this chapter we outline our proposed approach to implementing and maintaining the consumer panel. We also provide proposed methodologies for the three example projects presented in the ITT and our proposed approaches to analysis and reporting.

### 6.1 Setting up a consumer panel

The ITT notes that the successful contractor will need to develop or utilise an existing sample or 'community' of consumers who can be screened and targeted and are willing to be re-contacted for additional, bespoke insight projects. It is envisaged that the panel will make use of an existing online omnibus survey or access panel arrangement through which consumers can be profiled on key criteria.

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As outlined elsewhere in our proposal, we propose to develop a sub-panel of consumers using the Lightspeed GMI consumer panel. This approach offers a number of benefits, including the following:

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## 6.2 Panel size and composition

It will be important to develop as large a panel as possible, to allow access to all potential sub-groups of interest (for example, off-grid consumers). We propose to invite all c.150,000 active Lightspeed panellists to complete the initial profiling survey<sup>8</sup>. From this we would expect around **30,000 panellists** to complete the profiling survey. These 30,000 panellists would then form the sub-panel; substantial relevant information will be held about them (from the profiling survey, and data already held) and they can be used as a sample frame for follow-up or related research. We feel this approach offers a number of advantages:

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Once the panel is established, for each project conducted a limited number of panellists will be invited to participate; this will vary depending on the scale and nature of the research. At the outset of each project we will draw up a sample specification and provide this to DECC for review and sign-off. The specification will outline the number and composition of panellists to sample in order to deliver the required achieved sample and profile.

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## 6.3 Profiling survey

During the inception period we will invite all c. 150,000 Lightspeed GMI panellists to complete a short (up to 10 minute) profiling survey. This will allow consumers to be profiled on a range of key criteria covering demographics, information on property (e.g. property age, number of bedrooms) and attitudes (e.g. relating to energy sources, home energy measures). The profiling survey should also capture information that is likely to be required to support recruitment for future projects (e.g. involvement in community groups) to reduce the need for subsequent ad-hoc profiling. We can also ask in the profiling survey about willingness to participate in further (offline) research to provide an indication of levels of take-up. However, there will be a need to recruit separately for each individual project (see section 6.6 for further details).

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<sup>8</sup> We define 'active panellists' as those who continue to complete surveys on a regular basis and for whom we hold full demographic data. The size of the overall Lightspeed panel is c.450,000; however, we propose to recruit from just the c.150,000 active panellists.

One advantage of using an existing panel is that substantial information is already held about panellists. This includes most of the demographic information listed in the ITT as being required<sup>9</sup>. This will allow us to focus the profiling survey on collecting new information and also keep the survey length to a minimum, which will be important in maximising response.

The profiling survey will be conducted during the early weeks of the project. Based on our proposed timings the proofing exercise will be completed in mid-October, allowing the first projects to commence from late October/early November.

#### **6.3.1 Repeating the profiling survey to top-up sample and refresh details**

As with all panels, there will be a degree of attrition on the sub-panel built for DECC and without regular topping-up there is a danger that the panel will become too small to allow targeting of smaller priority groups. We therefore propose to repeat the profiling survey each year during the contract. This will allow new panellists to join the panel to replace those who have left over the preceding period, and maintain a panel of around 30,000 consumers. We also recommend re-asking existing panellists any profile questions where answers may change from year-to-year (e.g. relating to panellists' property) on an annual basis, to ensure that information held by panellists is kept up-to-date. This exercise could potentially be combined with an insight project to offset costs and maximise value<sup>10</sup>.

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## **6.6 Recruitment for projects**

A key objective for the panel will be to allow recruitment for additional bespoke research. We feel that given the range of projects and audiences that may be required over the course of this contract we will need to take a flexible approach to recruitment, using a mixture of recruitment of panellists and ad-hoc recruitment using free-find methods. Our proposed approach to recruiting Lightspeed panellists for offline research projects is as follows:

- We will collect as much data on panellists as possible as part of the initial profiling survey. This will ensure we have extensive information about panellists that can be used for future recruitment and reduce the need for separate ad-hoc profiling or screening surveys.
- The profiling survey will also ask panellists if they would be happy to take part in related offline research projects, to develop an initial base for this work.
- On receipt of a brief from DECC for a new project we will draw up a sample specification. If we feel that sample can be drawn from the Lightspeed Panel we will assess whether a further screening exercise is required (e.g. if we need to identify groups that are not already known from the initial profiling) and conduct this if necessary.
- Any screening survey would be undertaken with a targeted subsample – for example limited to particular areas of the country if there is a need for face-to-face fieldwork. All panellists responding to the screening survey will be asked whether they will be prepared to take part in follow-up research (with more specific information included at this stage – e.g. dates and approximate time commitment).
- This will generate a sample of available panellists that can be passed to TNS's recruitment team to contact directly to participate in the further research.
- Any panellists participating in offline research will be paid an incentive, reflecting the greater commitment required for these activities.

Where DECC are interested in conducting research which is either with a niche audience, focused on a particular location, is partly or wholly targeted at offline consumers, or on a very specific topic area, we would suggest that free-find recruitment is considered. Using our national network of recruiters we are able to access very specific groups

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<sup>13</sup> Jon Puleston is Vice President of Innovation at Lightspeed GMI, where he heads an international team called QuestionArts specialising in the design of surveys and the development of specialist tools and technology for conducting research in the online and mobile arena. He acts as a consultant on survey design to companies around the world.

<sup>14</sup> Tim Hanson has also conducted work in this area, including a paper presented at the 2015 Understanding Society Conference on device agnostic survey design: <https://www.iser.essex.ac.uk/research/publications/523179>



within quick timescales at a cost which is comparable to recruiting directly from the Lightspeed panel. Key features of our free-find recruitment include:

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We can also confirm that, through our recruitment team, we have the flexibility to recruit from sample lists or stakeholder gatekeeper organisations if required, whether through using existing lists of stakeholders (provided by DECC) or recruiting from businesses/supply chain for either online or offline engagement. We regularly recruit from sample provided by our clients including DfE, HMRC, BIS and DWP. We often work with our client to produce an introductory communication to facilitate their engagement and support for the research. This would then be followed up by our recruitment team.

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#### **6.9.1 Synthesis “final” reports**

As requested in the ITT, we have included a cost for producing synthesis “final” reports. Subject to agreement and panel usage, reports will be submitted annually or every six months and will cover key lessons learnt and link to policy development. The reports will be drafted by key members of our team who were involved with specific projects conducted during each period. We will work with the DECC team to agree a report structure and requirements for content in advance of drafting, to ensure drafts delivered meet your requirements. All reports will be reviewed and signed-off by a Director in TNS BMRB before delivery to DECC.

All reports submitted to DECC will be suitable for publication and future use. Reports will be produced in accordance with DECC report writing guidance and comply with the GSR code<sup>27</sup>. Our team includes staff who have previously authored published reports from DECC and we are fully aware of, and can deliver to, the standards required.

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<sup>27</sup> <http://www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html>



## 7. Pricing schedule

In this section we present our price schedule in accordance with the structure set out in the ITT. We note the following up front:

- We have only provided named staff for the initiation/inception phase. For the other projects we have included the number of days that will be required per grade based on the assumptions we have outlined in our proposal. The named staff who will work on the projects will be dependent on the timings of projects and the detailed specification and therefore cannot be confirmed at this stage.

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- We have included costs associated with ongoing contract management as part of the initiation/ inception costs provided.
- Our costs do not include additional profiling surveys that will be required in future years, in order to maintain a panel of around 30,000 consumers. We propose to repeat the profiling survey each year, as well as checking and refreshing the details of existing panellists. We can provide a cost for this activity if required; however, it is likely to be roughly equivalent to the cost of the initial profiling survey.
- In section 7.4 we have included costs for a range of methodologies that may be required over the course of the contract. We have included details on the assumptions that have been used for each activity in the table provided; however, we note here that our costs largely cover only recruitment and data collection and not development work or analysis and reporting. The cost for each method will be based on a detailed specification as agreed between DECC and TNS BMRB on a project-by-project basis.
- The costs provided for the three example projects should also be seen as indicative, and are subject to change based on the final requirements for each project. We are committed to working to DECC in delivering each project and in establishing designs that meet your requirements within the budgets available.
- We have provided a cost per synthesis report in section 7.5. We have assumed that these reports will largely be based on material already delivered to DECC (for specific projects) but will draw findings and implications together and be produced to a standard suitable for publication. The precise cost of these reports will be dependent on the number of projects commissioned and included in reports. Our costs provided here are based on the inclusion of up to 10 projects per report. We have also assumed that reports will be up to around 50 pages in length.
- All costs provided are exclusive of VAT.

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<sup>28</sup> Day rates will be subject to inflation for future years of the contract.

7.1 Initiation / Inception Phase (Panel implementation): Price Schedule

**REDACTED**

Part C – Full price offered

Total (Part A + Part B)	£19,790
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