



Department
of Energy &
Climate Change

Research into businesses that were not certified Green Deal suppliers

Technical Report

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Glossary of Terms and Acronyms

This Technical Report uses the following terms and acronyms:

CCA	Consumer Credit Act
CWI	Cavity wall insulation
DEA	Domestic Energy Assessor
DECC	Department of Energy and Climate Change
ECO	Energy Companies Obligation
EPC	Energy Performance Certificate
EWI	External wall insulation
FiTs	(Solar) Feed-in Tariffs
GD advisor	Green Deal advisor
GD assessor	Green Deal assessor organisation (GDAO)
GD installer	Green Deal installer
GD ORB	Green Deal Oversight and Registration Body
GD provider	Green Deal provider
GD	Green Deal
HTTCWI	Hard-to-treat cavity wall insulation
INCA	Insulated Render and Cladding Association
MCS	Microgeneration Certification Scheme
NIA	National Insulation Association
PAS2030	Publicly Available Specification 2030
PV	Solar Photovoltaic
RdSAP	Reduced Data Standard Assessment Procedure
RHI	Renewable Heat Incentive
RHPP	Renewable Heat Premium Payment

1. Overview of the study

- 1.1. In September 2013, ICF International, working with BMG Research, was commissioned by DECC to carry out research with selected businesses that were not registered participants with the Green Deal (GD) supply chain. This study forms part of the evaluation of the Green Deal and Energy Companies Obligation (ECO) programme that is being led by ICF International..
- 1.2. The aim of this study was to provide evidence on why certain types of business had, thus far, chosen not to become Green Deal suppliers, and to examine whether there were any barriers to entry. The study was also intended to provide information about the market outside the Green Deal, including if and how these businesses engaged with the Green Deal supply chain.
- 1.3. This study involved a mixture of quantitative and qualitative research with selected businesses and individuals that were not certified GD suppliers. Between January and April 2014, the following primary research was carried out:
 - A quantitative telephone survey of a random sample of Domestic Energy Advisors (DEAs), Microgeneration Certification Scheme (MCS) registered installers and Gas Safe registered installers located in Great Britain¹ that were not certified GD suppliers as at January 2014. A total of 209 surveys were completed with DEAs, 110 surveys with MCS installers, and 83 surveys with Gas Safe installers.
 - In-depth semi-structured qualitative interviews with a purposely-selected sample of external wall insulation (EWI) and hard-to-treat cavity wall insulation (HTTCWI) installers and potential GD providers located in Great Britain that were not certified GD suppliers as at January 2014. A total of 15 interviews were completed, consisting of six interviews with EWI and HTTCWI installers and nine interviews with potential GD providers.
- 1.4. This Technical Report provides information about the design and delivery of the study, and should be read alongside the analytical report, the research instruments used, and the data tables from the quantitative survey².

¹ Note that whilst population data are for the United Kingdom, the sample frame consisted of DEAs, MCS installers and Gas Safe installers in Great Britain, since neither Green Deal nor ECO are available in Northern Ireland

² All available at <https://www.gov.uk/government/publications/research-into-businesses-that-were-not-certified-green-deal-suppliers>

2. Quantitative survey

Drawing the samples

- 2.1. The populations of interest for the quantitative survey consisted of all DEAs, MCS installers and Gas Safe installers that were registered with their respective certification schemes as at the beginning of January 2014.

The sample of DEAs

- 2.2. DEAs are listed on the Domestic Energy Performance Certificate (EPC) Register, that is currently administered by Landmark in England and Wales³, and by the Energy Savings Trust in Scotland⁴. There are thought to be over 10,000 registered DEAs in Great Britain⁵.
- 2.3. DECC did not have access to the Domestic EPC complete register, and so it was not possible to access comprehensive data on the DEA population. Instead, a sample frame had to be constructed using the online search facility that was available on the register. When a postcode is entered into the search facility, contact details for the nearest 20 registered DEAs are provided.
- 2.4. Systematic sampling was used to select a random sample of 120 British postcodes that contained at least one small and medium sized enterprise (SME)⁶. It was important to ensure that these postcodes were selected in the correct regional proportions, which was done through use of the results of the Small Business Survey (SBS) 2012⁷, which was carried out by BMG Research. The SBS sample was drawn from Dun & Bradstreet's commercial database and, ignoring the Northern Ireland contacts (which did not fall into the scope of this study), consisted of around 45,000 SME contacts. SME contacts were separated into country (necessary because SBS had boosts in Scotland and Wales), and sorted into alphabetical order by postcode. Using a '1 in n' sampling technique, 107 postcodes were selected for England, 8 for Scotland and 5 for Wales (these numbers being chosen according to the distribution of SMEs across Great Britain).
- 2.5. Each of the 120 postcodes was entered into the Domestic EPC register search facility, resulting in the creation of a contact database of 2,400 DEAs⁸. Since there was overlap in the identities of the DEAs returned using this postcode search, the contact database had to be de-duplicated by analysis of DEAs' name, address, accreditation number

³ <https://www.epcregister.com/home.html>

⁴ <https://www.scottishepcregister.org.uk/>

⁵ Based on DCLG estimates that in November 2012 there were 10,299 registered RdSAP qualified DEAs – see http://www.energyassessorsforums.co.uk/cgi-bin/gforum/gforum.cgi?do=post_attachment;postatt_id=29;quest=15599748

⁶ based on the EU definition of an SME (http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index_en.htm), where: Micro = <10 employees and turnover ≤£1.6m; Small = <50 employees and turnover ≤£8m; Medium = <250 employees and turnover ≤£40m; Large = ≥250 employees and turnover >£40m

⁷ The 2012 SBS was a representative survey of 5,723 SMEs across the UK.

⁸ It should be noted that this approach might not yield a completely random sample, since DEAs might be expected to be more likely to have been selected if they worked in postcodes where there were relatively few other DEAs. However, the result is likely to be reasonably close to random, and was the best available method given the lack of access to population data.

and/or telephone number. This resulted in the reduction of the sample frame to 1,552 records.

- 2.6. Since the subject of the study was DEAs that were not certified GD suppliers, it was also necessary to de-duplicate the sample frame against the population of certified GD advisors (which was created by BMG Research as part of a parallel study on the GD supply chain). This was also done through analysis of DEAs' name, address, accreditation number and/or telephone number. The resultant de-duplicated sample frame of DEAs consisted of 1,342 records (see Figure 2.1).

The sample of Gas Safe installers

- 2.7. Any engineer who installs gas boilers must be included on the Gas Safe Register, which covers all of the UK. There are over 125,000 registered installers on the Gas Safe Register, and over 70,000 registered businesses (which may consist of sole traders or businesses that employ multiple gas engineers)⁹.
- 2.8. DECC did not have access to the complete Gas Safe Register, and so it was not possible to access comprehensive data on the Gas Safe installer population. As with DEAs, the Gas Safe installer sample frame was instead constructed using online search facility available on the register. When a postcode is entered into the search facility, contact details for the nearest 50 registered Gas Safe installers are provided.
- 2.9. The Gas Safe installer sample was drawn in two stages, as the first sample proved insufficiently large to generate enough contacts to achieve the required number of completed surveys. In the first stage, systematic sampling was used to select a random sample of 84 British postcodes. The method for drawing these was the same as for DEAs (i.e. taking a random sample of postcodes from SBS contacts). A total of 75 of the postcodes drawn were in England, 6 in Scotland and 3 in Wales. In the second stage of postcodes drawn, postcodes drawn in the first stage were excluded (at the outward level, e.g. B1, BA1), and 40 further postcodes were drawn. A total of 36 were in England, 3 in Scotland and 1 in Wales.
- 2.10. Postcodes (from both stages) were entered into the Gas Safe Register search facility, and the first 10 contacts were selected from each postcode¹⁰. A contact database of 1,240 contacts was created in this way¹¹. However, there was overlap in the identities of the Gas Safe installers returned using this postcode search, as a result of duplicate installers within each postcode sampled, across postcodes sharing geographical proximity, and between the first and second sample stages. Therefore, the contact database had to be de-duplicated by analysis of installers' name, address and/or telephone number. This resulted in the reduction of the sample frame to 1,166 records.
- 2.11. Finally, the sample frame of Gas Safe installers was de-duplicated against the population of certified GD suppliers, in order to identify and remove Gas Safe installers that were also certified GD installers. Once this was done, the final sample frame of Gas Safe installers consisted of 1,143 records (see Figure 2.1).

⁹ http://www.gassaferegister.co.uk/about/stakeholder_hub/key_stats_and_prosecutions.aspx

¹⁰ The search gave a total of 50 contacts per postcode, but rather than sampling all of these, a greater geographical range of postcodes was preferred in order to generate the required number of contacts

¹¹ As with the DEA sample construction process, it should be noted that this approach might not yield a completely random sample, since Gas Safe installers might be expected to be more likely to have been selected if they worked in postcodes where there were relatively few other Gas Safe installers

The sample of MCS installers

- 2.12. The MCS is a quality assurance scheme covering the microgeneration installation sector. Microgeneration consists of products designed to generate electricity and heat from renewable sources, such as: air and ground source heat pumps; Solar Photovoltaic (PV) and solar thermal; biomass boilers; and micro combined heat and power systems. Installations under FiTs or the Domestic RHI – and before this the Renewable Heat Premium Payment (RHPP) – must be carried out by MCS certified installers.
- 2.13. The construction of a sample frame for MCS installers was simpler than was the case for samples of DEAs and Gas Safe installers, since DECC was able to secure access to the complete register¹². There were a total of 3,722 MCS certified installers as at January 2014. For each record in the register, a company name and certification number was provided, as well as the date of certification and a telephone number. No named individual or email address was supplied.
- 2.14. As previously, it was necessary to de-duplicate the contact database against the population of certified GD suppliers. Once this was completed, a total of 3,010 MCS installers remained (see Figure 2.1).

De-duplication across the three sample frames

- 2.15. There was a very small amount of overlap across the three samples, where, for instance, an individual or business fulfilled multiple roles (e.g. was a DEA and also a registered Gas Safe installer). These businesses were allocated to one sample frame, in the following sequence: MCS installers, DEAs, Gas Safe installers.

Drawing the samples

- 2.16. For DEAs, Gas Safe installers and MCS installers, a '1 in n' sample was drawn to select the final samples. The number of contacts drawn was based on an expected response rate of: 25% (i.e. 1 in 4) for DEAs, 16.7% (i.e. 1 in 6) for MCS installers and 12.5% (i.e. 1 in 8) for Gas Safe installers. These proportions were selected based on BMG Research's experiences of carrying out similar business surveys, and were varied since it was expected that response rates would vary between DEAs, Gas Safe installers and MCS installers (as proved to be the case – see Figure 2.2)
- 2.17. As noted previously, the sample of Gas Safe installers was actually drawn in two stages due to a lower than expected response rate the first time around: first a de-duplicated sample of 775, and then a second de-duplicated sample of 368.
- 2.18. Prior to drawing, the sample of MCS installers was stratified using the only variable available for the population: date of certification. Three bands were used: pre-June 2011; June 2011 to February 2012; and March 2012 to December 2013.
- 2.19. Figure 2.1 summarises the populations, sample frames and samples of DEAs, Gas Safe installers and MCS installers.

¹² <http://www.microgenerationcertification.org/>

Figure 2.1: Estimated populations of DEAs, MCS installers and Gas Safe installers and corresponding sample frames and samples

	DEAs	MCS installers	Gas Safe installers*
Estimated population (UK)	10,300	3,722	125,000
Sample frame (Great Britain only)	2,400	3,722	1,240
De-duplicated sample frame* (Great Britain only)	1,342	3,010	1,143
Sample (Great Britain only)	800	600	800

Note: * The sample was drawn in two stages; # once the following have been removed: duplicate records within each sample frame; overlap with the certified GD supplier population; duplication across the three sample frames

Fieldwork

- 2.20. Prior to being contacted, Gas Safe installers were sent an email explaining the research, with an attached letter on DECC headed paper. A copy of this advance letter is included as Annex 1. It was not possible to send an advance letter to either DEAs or MCS installers because no email addresses were available within the sampling frame.
- 2.21. The research instruments used have been published separately¹³. Surveys were conducted using Computer Assisted Telephone Interviewing (CATI). Surveying took place from BMG Research’s call centre in Birmingham. Telephone interviewers were full briefed by BMG Research, ICF International and DECC executives.
- 2.22. Excepting unobtainable numbers (‘dead lines’, wrong numbers etc.), up to ten attempts were made to contact all companies within the samples. After ten unsuccessful attempts (answer phones, engaged, no replies etc.), contacts were labelled as a non-response. Surveys were undertaken both during weekdays and weekends, and at different times in the day (daytime and early evening).

Pilot fieldwork

- 2.23. A pilot took place from the 22 to 28 January 2014, and 10 surveys were achieved from 100 randomly selected contacts. It became clear over the course of the pilot that there was likely to be a low response rate (a response rate of 10% was eventually achieved), with a large number of cases where it was not possible to reach anybody (each contact was called up to ten times), and some refusals. Following the experience of the pilot, the possibility of evening appointments was introduced to the mainstage survey in order to boost the response rate. Various revisions were also made to the phrasing of some questions and the codes that were available to respondents (revisions to the codes that were used in the pilot and also the addition of new options where appropriate). These amendments were sufficiently minor that the data generated through the pilot could be included within the main dataset (with some back-coding to the new codes).

¹³ Available at <https://www.gov.uk/government/publications/research-into-businesses-that-were-not-certified-green-deal-suppliers>

Mainstage fieldwork

2.24. Mainstage surveying started on 4 February 2014, and continued until 4 March 2014. In total, 402 surveys were achieved, broken down as follows:

- 209 surveys with DEAs
- 110 surveys with MCS installers
- 83 surveys with Gas Safe installers

2.25. The final mean average survey length was just over 20 minutes, with the shortest survey being 12 minutes and the longest 48 minutes.

Call outcomes and response rates

2.26. Table 2.3 summarises call outcomes and response rates. Call outcomes are classified using the following categories:

- Completed surveys
- Screen outs, because respondents reported that they were actually a certified GD supplier
- Refusals. Most refusals were due to lack of time or availability, which is likely to have been affected by the timing of the research, which took place during the busy winter season (February). Some refusals were also on the grounds that contacts believed that they did not 'know' Green Deal well enough to participate (despite the fact that the survey was designed to include such businesses), which is likely to be a function of the fact that they were unwilling to spend time on a survey about a scheme within which they had not participated
- Unobtainable numbers (dead line etc.)
- Companies that were called at least ten times without a survey occurring (some of these were hard appointments that could only be arranged after the fieldwork period)

2.27. When based on all eligible establishments in the sample (i.e. discounting contacts that were 'screened out' because they were certified GD suppliers), the adjusted response rate ranged from 28% amongst DEAs, through 20% amongst MCS installers and 11% amongst Gas Safe installers.

Figure 2.2: Call outcomes and response rates

Sample type	Un-adjusted sample (A)	Screen out (B)	Eligible sample (D): A-B	Refusal (C)	Un-obtainable (D)	Called 10 times without success (E)	Completed (F)	Adjusted response rate (F/D)
DEAs	800	65	735	268	60	198	209	28%
MCS installers	600	37	563	281	72	100	110	20%
Gas Safe installers	800	19	781	368	103	227	83	11%

Data processing and analysis

Coding

- 2.28. The pilot was used to test codes for the questions in the quantitative survey, and some revisions were made. The pilot responses to open-ended questions and questions with an 'other' response option were analysed in order to refine and set the response codes.
- 2.29. For the mainstage survey, for some questions, respondents were asked to specify details whenever they selected 'other' as an option. These verbatim responses were then analysed and, where possible, were back-coded to existing codes or to especially created codes that had been agreed with DECC. The exception was those answers that were unclear or too general or where answers were 'unique' because they were given by just one survey respondent.

Testing for non-response bias

- 2.30. As shown in Figure 2.2, response rates for the three surveys were relatively low, ranging from 11% to 28%. It is believed – though this information was not collected systematically – that this was a function of the fact that the survey was undertaken during the winter (a busy time for installers), as well as a probable reluctance on the part of some businesses to spend the time completing a survey about a scheme within which that they had elected not to participate.
- 2.31. Upon completion of the survey, the study team carried out a check for evidence of unit non-response bias (i.e. whether there is systematic variation in response rates within the three samples). The scope of this exercise was limited due to the lack of information available about the characteristics of the populations of DEAs, MCS installers or Gas Safe installers, which would typically be used in order to assess whether the samples were representative of the populations from which they were drawn. Instead, z-tests were used to test for significant differences in response rates between different 'sub-groups' within the samples (defined on the basis of the limited available data on the characteristics of the samples). This exercise found that there were no significant differences in response rates between sub-groups, as follows:
- *DEAs*: based on analysis of postcodes, all DEAs in the sample were assigned to a English region or devolved administration. The response rates for each region/ devolved administration ranged from 21.4% in Scotland to 37.5% in North East England. Z-tests found that there were no significant differences between any of the regional response rates (at a 95% confidence level).
 - *MCS installers*: since postcode information was not available for all MCS installers in the sample, z-tests were used to test for significant differences in response rates between MCS installers that were certified between: pre-June 2011; June 2011- February 2012; and from March 2012 to December 2013. No significant differences were observed at a 95% confidence level.
 - *Gas Safe installers*: as with DEAs, z-tests were carried out to test for significant differences in regional response rates (which ranged from 5% in Yorkshire & Humber to 20% in North East England), and none were found at a 95% confidence level.
- 2.32. Whilst testing for significant differences in response rates is not a comprehensive method for assessing unit non-response bias, it was the best available option given limitations in what was known about the three study populations.

Post-survey weighting

2.33. Survey data were not weighted for the following reasons:

- For DEAs and Gas Safe installers no data were available on the characteristics of the populations
- For MCS installers, population data were only available on the date of registration, which was not considered a suitable weighting variable

2.34. The lack of weighting thus assumes that the samples are reasonably representative of the three populations, which may or may not be true, but there are no observable variables available suggesting otherwise.

The use of Gas Safe installer data

2.35. Upon completion of the survey of Gas Safe installers, it was decided that the achieved sample was insufficiently large to enable quantitative analysis of the results. This was because the resultant confidence intervals (see Figure 2.3 below) were too wide to provide sufficient precision about true population values.

2.36. Instead, qualitative analysis techniques were applied to the data that were generated through the survey of Gas Safe installers. This included descriptive analysis of responses to questions and, where possible, between-case analysis (i.e. examination of patterns of responses across questions, and whether this varied depending on the characteristics of respondents). Note that there were limitations to the depth of analysis that could be undertaken using these data, since information was collected via a quantitative survey instrument that largely consisted of closed-ended questions. Survey respondents did not have the opportunity to expand on their answers or provide explanations, and so the depth of discussion of the results was limited.

Data analysis and reporting conventions (DEAs and MCS installers)

2.37. Data tables were produced that presented un-weighted responses to all questions. Small overall sample sizes for the surveys of DEAs, MCS installers and Gas Safe installers meant that sub-group analysis was not possible, and so no cross-tabulations were carried out.

2.38. All reporting of survey analysis followed the following conventions:

- All differences between groups and within sub-groups that are commented on in the analysis are statistically significant at the 95% confidence level
- 'Don't know' and 'refused' answers have been omitted from the charts except where they are relevant
- For the data relating to MCS installers in the main body of the analytical report (not including the executive summary or key messages for readability), confidence intervals (expressed as $\pm\%$) were included as a footnote after each proportion cited in the text, since the small sample size for MCS installers meant that the confidence intervals were relatively wide (see below for further details on confidence intervals)
- Where businesses and organisations are described as 'respondents', this indicates that evidence was generated through the quantitative survey

Confidence intervals

- 2.39. A confidence interval is a measure of the range within which it is probable that a population value lies. The wider the confidence interval, the more variation there is in an estimate of the population value. It is typical to calculate confidence intervals using a 95% confidence level. This means that we are 95% certain that the population value lies within the confidence interval (i.e. that if we drew 100 samples from the population and asked the same question, in 95 of these 100 samples, their response to the question would lie within the range of the confidence interval).
- 2.40. Figure 2.3 shows the confidence intervals for a selection of sample sizes for a range of survey estimates (e.g. percentages of survey respondents). For example, if 209 DEAs answered a yes/no question and 50% said 'yes', we can be 95% certain that between 43.3% and 56.7% of all DEAs in the population would have answered 'yes'. As this table demonstrates, confidence intervals narrow (meaning greater precision about the true population value) when the sample size increases and/or where responses are more 'polarised' (i.e. where a high/low proportion of survey respondents provide a particular response). Note that where analysis of sub-groups has been undertaken, the sample size decreases and thus the confidence intervals widen compared to the values shown in Figure 2.3 (meaning less precision about the true population value).

Figure 2.3: Confidence intervals for the quantitative survey (expressed as +/- %) for a selection of survey responses (percentages)

Category of business	Achieved sample size	Estimated de-duplicated population	Survey response		
			10% / 90%	30% / 70%	50% / 50%
DEAs	209	10,300	+/- 4%	+/- 6.1%	+/- 6.7%
MCS installers	110	3,000	+/- 5.8%	+/- 8.8%	+/- 9.6%
For illustrative purposes:					
Gas Safe installers	83	125,000	+/- 6.5%	+/- 9.9%	+/- 10.8%

3. Qualitative research

Overview

- 3.1. In-depth qualitative interviews were undertaken with:
 - Installers of hard-to-treat cavity wall insulation (HTTCWI) and/or external wall insulation (EWI).
 - Organisations that were not certified Green Deal providers, but could potentially fulfil this role. These organisations included: trade associations, consumer organisations, a housing association, a facilities management company, and manufacturers and wholesale suppliers of energy efficiency products and other construction materials.
- 3.2. The qualitative interviews were undertaken to provide detailed insights into levels of awareness and engagement with the Green Deal and ECO, views of the programme, reasons for not becoming Green Deal installers or providers to date, future intentions of becoming certified, and business models and activities outside of Green Deal and ECO.
- 3.3. Qualitative interviews were chosen as the most appropriate methodology for research with HTTCWI and EWI installers, and potential Green Deal providers. There were two reasons for this decision:
 - It was not possible to develop an appropriate population for either category of organisation. For installers of HTTCWI and EWI, this was because the identifiable population was relatively small¹⁴, and preliminary research found that many of these businesses were already certified Green Deal installers¹⁵. For potential Green Deal providers, this was because there were no parameters that could be used to define a manageably-sized population. Research¹⁶ has found that certified Green Deal providers come from a diverse range of backgrounds, encompassing installers, financial advisors/ brokers, retailers/ wholesalers, property maintenance/ construction businesses, and DEAs. The potential population was thus too large to be practical.
 - For potential Green Deal providers in particular, research questions were too complex and specific to each organisation, meaning that a quantitative survey with closed questions would not capture sufficient quality of data.
- 3.4. The research study also intended to undertake qualitative interviews with organisations that had recently commenced the Green Deal certification process, but had 'dropped out' before completion. These interviews intended to explore organisations' views about the certification process and Green Deal more widely. However, no contact details were available for organisations that had started and stopped certification. These organisations were instead contacted by certification bodies and asked if they wanted to

¹⁴ Based on membership of INCA, NIA and construction and general business directories

¹⁵ Of the 104 businesses that were listed as members of INCA and/or NIA in January 2014, 95 were also listed as certified GD installers on the GD ORB database

¹⁶ ICF for DECC (June 2014) Research on the Green Deal Provider Market

participate in the study. Only three organisations 'opted-in' in this way, and when re-contacted to request an interview, two refused to participate and one had, in the meantime, re-applied and become Green Deal certified. As a result, this line of research was dropped from the study methodology.

Sample design

- 3.5. Qualitative samples were purposively selected to ensure coverage of a range of different types of organisation, and comprised:
- *A total of 38 installers of HTTCWI and EWI that were not certified Green Deal installers.* The sample was based upon membership of INCA and the NIA (though as noted above, the vast majority of these were already certified GD suppliers), supplemented by businesses identified through analysis of other construction and general business directories. These contacts were de-duplicated against the Green Deal Oversight and Registration Body (GD ORB) register of Green Deal installers to ensure the sample excluded organisations that were already certified.
 - *A total of 73 potential Green Deal providers.* These contacts were identified by searching directories of businesses sharing similar characteristics to the existing population of GD providers such as providers of consumer credit, facilities management companies, manufacturers and installers of energy efficiency products, and wholesale suppliers of energy efficiency products and other construction materials. These directories included: the Consumer Credit register; membership of the Facilities Management Association (FMA) and the British Institute of Facilities Management (BIFM); and general internet searches. Additional contacts were added based on discussions with the Green Deal policy team at DECC, to identify organisations that had contacted DECC about Green Deal provider status and were willing to have their details shared with the study team at ICF and BMG Research. As above, contacts were de-duplicated against the GD ORB register of certified Green Deal suppliers to ensure the sample excluded organisations that were already GD certified.

Recruitment

- 3.6. All organisations in the two samples were sent an email introducing the research project and the overall Green Deal and ECO evaluation (with an attached letter on DECC headed paper – see Annex 2), and offering an opportunity to opt-out of the research. Those who did not opt-out of the research were contacted by telephone to arrange a convenient time for the interview. All prospective interviewees were contacted via either email or telephone at least ten times before being labelled as non-participants.
- 3.7. Many organisations in the two samples declined to be involved in the evaluation, most of whom cited a lack of time. Several contacts in the 'potential Green Deal provider' sample indicated that they did not feel sufficiently informed about the Green Deal and ECO programme to participate in the research.

Overview of achieved sample

- 3.8. A total of 15 qualitative interviews were undertaken across the two samples. The achieved sample of 15 interviews included a diversity of supplier types, including six

HTTCWI and EWI installers and nine organisations that were considered to be potential GD providers. See Figure 3.1 for a summary of the target and achieved samples.

Figure 3.1: Characteristics of the target and achieved samples of qualitative interviews

Sample group	Sample characteristics	Sample categories	Target sample (number)	Achieved sample (number)
HTTCWI and EWI installers	Type of installer	EWI installer	No specific target	4
		HTTCWI installer		2
	Total interviews		15	6
Potential GD providers	Type of organisation	Network body	2+	4
		Builders' merchant	2+	2
		Service contract provider	2+	2
		Manufacturer	2+	1
	Holder of a Category A CCA licence	Yes	7+	3
		No	2+	6
	Total interviews		12	9

Fieldwork

- 3.9. The qualitative interviews were conducted by staff from ICF International and BMG Research, who had been briefed in advance. The topic guides used for the qualitative interviews can be found in the research instruments published separately¹⁷. The interviews were carried out between 10 March 2014 and 8 June 2014 and each interview lasted for an average of approximately 30 minutes. Interviewees were asked whether they were happy for the interviews to be recorded and were reassured that the audio recordings would be stored securely and treated in confidence and would only be accessible to staff from ICF International who were working on this study. None of the interviewees opted out of recordings, so all interviews were recorded.
- 3.10. The interviews used two semi-structured interview guides, one for HTTCWI and EWI installers and one for potential Green Deal providers. The questions differed slightly for each topic guide, although all interviewees were asked about:
- their current business models and the activities of their organisation
 - their experiences of installing energy efficiency measures and/or brokering/offering finance to consumers
 - their awareness and understanding of the GD and ECO and any previous engagement with the programme (including any previous experiences of GD certification processes);
 - their views of the programme and its impact on the wider market;

¹⁷ Available at <https://www.gov.uk/government/publications/research-into-businesses-that-were-not-certified-green-deal-suppliers>

- barriers and reasons for not participating in the GD market; and
 - future intentions with regards to participation in GD or ECO.
- 3.11. The exact flow and question wording was also tailored by the interviewer to best fit the pattern of the interview and the responses of the interviewee. Interviewers also undertook some initial internet research prior to each interview to familiarise themselves with the interviewee's organisation.

Analysis of qualitative data

- 3.12. Interview recordings were transcribed and, on completion of the qualitative interviews, the findings were discussed amongst the team of qualitative interviewers in order to help identify key trends and themes from the interviews.
- 3.13. Interpretation and analysis of the qualitative data was then conducted using thematic analysis frameworks, created in Microsoft Excel and comprising the following themes:
- **'Background' themes**, which explored: the size, structure, age, activities and geographical focus of organisations; the types of clients they work for; their relationships with other businesses; and their previous experience of other Government programmes.
 - **'ECO' themes**, which explored: levels of awareness and understanding of ECO; previous engagement and delivery through ECO; views of the ECO programme; reasons for non-participation; and whether they would consider participating in ECO in the future.
 - **'Green Deal' themes**, which explored: levels of awareness and understanding of the Green Deal programme and the role of Green Deal providers; previous experiences of certification processes; views of the Green Deal programme including the perceived advantages and disadvantages of becoming certified as a Green Deal supplier; and whether they would consider becoming certified in the future.
 - **Themes relating to the 'wider HTTCWI and EWI market'**, which explored: the scale of activity and current levels of demand in the market; any key issues in the market; views of PAS2030 certification; and the effects of the Green Deal and ECO programme (and the recent changes announced in January 2014) on the wider market.
 - **'Finance' themes**, which explored: whether organisations held a CCA licence and/or brokered or offered finance; details of any finance brokered or offered to consumers; and views of Green Deal finance.
- 3.14. Each row in the analysis framework represented an individual interviewee or organisation, while the columns showed the key themes for the analysis. The key themes for the analysis framework were based on the key topics and questions in the topic guides. The data from each interview was then classified and summarised across the various themes in the framework. The analysis framework enabled between-case analysis, where patterns of responses were examined across questions, and against the characteristics of the interviewees (i.e. to enable comparisons between different types of organisation).

Qualitative research

- 3.15. This approach to qualitative data analysis allowed the responses to particular topics to be grounded in interviewees' own accounts, whilst also enabling analysis of the key research themes. Relevant direct quotations were also included in the framework and have been used in the report to help to illustrate key points and perspectives.
- 3.16. Where businesses and organisations are described as 'interviewees' this indicates that evidence was generated through qualitative research.

Annex 1: Quantitative survey advance letter



Department
of Energy &
Climate Change

Date: 16th January 2014

Subject: Independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO)

Dear Sir/Madam,

ICF GHK (www.ghkint.com) and BMG Research (www.bmgresearch.co.uk) have been commissioned by the Department of Energy and Climate Change (DECC) to conduct an independent evaluation of the Green Deal (GD) and Energy Company Obligation (ECO).

A key component of this evaluation is research with businesses that have decided not to become certified to deliver GD installations.

This is an opportunity for you to provide your views on the delivery of the GD and ECO and your reasons for not becoming certified to deliver GD installations. Your feedback is invaluable as it enables DECC to learn lessons that improve its policies and their benefits to business. It will also inform the independent evaluation and on-going delivery of the GD and ECO programme.

The research will involve a telephone survey undertaken by experienced interviewers working for BMG Research and will last approximately 15-20 minutes. A member of the BMG Research team is likely to contact you during January or February 2014 to arrange a convenient time to speak with you.

ICF GHK and BMG Research are independent research companies, and all the information you provide will be treated with the strictest confidence. DECC will not be provided with any information that will identify you or your organisation.

We hope you participate in this important study. If you would like to discuss the evaluation with DECC, please contact [REDACTED], via email ([REDACTED]).

Thanks in advance for your help

Kind regards,
[REDACTED]

Annex 2: Qualitative interview advance letters



Department
of Energy &
Climate Change

Date: 24 February 2014

Subject: Independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO)

Dear Sir/Madam

ICF GHK (www.ghkint.com) and BMG Research (www.bmgresearch.co.uk) have been commissioned by the Department of Energy and Climate Change (DECC) to conduct an independent evaluation of the Green Deal (GD) and Energy Company Obligation (ECO).

A key component of this evaluation is research with businesses in the solid wall insulation industry that are not currently registered to deliver GD services.

Your expertise is vital in helping DECC to understand the wider market for solid wall insulation and the attractiveness of the GD and ECO programme. This is an opportunity for you to contribute to government policy whilst also increasing your understanding of new market opportunities. Your feedback is invaluable as it enables DECC to learn lessons that improve its policies and their benefits to business. It will also inform the independent evaluation and on-going delivery of the GD and ECO programme.

Representatives from BMG Research will be conducting telephone interviews in March with a selection of businesses in this market and it would be greatly appreciated if you could take part. The interview will last approximately 30 minutes and will take place at a time convenient to you. All the information you provide will be treated with the strictest confidence and DECC will not be provided with any information that will identify you or your organisation.

We hope you participate in this important study, but if you do not wish to take part, please let the ICF GHK research team know by contacting the research manager, [REDACTED], via email ([REDACTED]) or by telephone ([REDACTED]). If you would like to discuss the evaluation with DECC, please contact [REDACTED] via email ([REDACTED]).

Thanks in advance for your help

Kind regards,

[REDACTED]



Department
of Energy &
Climate Change

Date: 25 February 2014

Subject: Independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO)

Dear Sir/Madam

ICF GHK (www.ghkint.com) and BMG Research (www.bmgresearch.co.uk) have been commissioned by the Department of Energy and Climate Change (DECC) to conduct an independent evaluation of the Green Deal (GD) and Energy Company Obligation (ECO).

A key component of this evaluation is research with manufacturing and installation businesses that are not currently registered to deliver GD services.

Your expertise is vital in helping DECC to understand the wider market for energy efficiency and renewable energy measures and the attractiveness of the GD and ECO programme. This is an opportunity for you to contribute to government policy whilst also increasing your understanding of new market opportunities. Your feedback is invaluable as it enables DECC to learn lessons that improve its policies and their benefits to business. It will also inform the independent evaluation and on-going delivery of the GD and ECO programme.

Representatives from BMG Research will be conducting telephone interviews in March with a selection of businesses in this market and it would be greatly appreciated if you could take part. The interview will last approximately 30 minutes and will take place at a time convenient to you. All the information you provide will be treated with the strictest confidence and DECC will not be provided with any information that will identify you or your organisation.

We hope you participate in this important study, but if you do not wish to take part, please let the ICF GHK research team know by contacting the research manager, [REDACTED], via email ([REDACTED]) or by telephone ([REDACTED]). If you would like to discuss the evaluation with DECC, please contact [REDACTED] via email ([REDACTED]).

Thanks in advance for your help

Kind regards,
[REDACTED]



Department
of Energy &
Climate Change

Date: 25 February 2014

Subject: Independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO)

Dear Sir/Madam

ICF GHK (www.ghkint.com) has been commissioned by the Department of Energy and Climate Change (DECC) to conduct an independent evaluation of the Green Deal (GD) and Energy Company Obligation (ECO).

A key component of this evaluation is research with businesses in the building and construction industry that are not currently registered to deliver GD services.

Your expertise is vital in helping DECC to understand the wider building and construction industry and the attractiveness of the GD and ECO programme. This is an opportunity for you to contribute to government policy whilst also increasing your understanding of new market opportunities. Your feedback is invaluable as it enables DECC to learn lessons that improve its policies and their benefits to business. It will also inform the independent evaluation and on-going delivery of the GD and ECO programme.

Representatives from ICF GHK will be conducting telephone interviews in March with a selection of businesses in this market and it would be greatly appreciated if you could take part. The interview will last approximately 30 minutes and will take place at a time convenient to you. All the information you provide will be treated with the strictest confidence and ICF GHK will not provide DECC with any information that will identify you or your organisation.

ICF GHK will provide an advance copy of the discussion topics that they would like to cover in order to give you time to prepare.

We hope you participate in this important study, but if you do not wish to take part, please let the ICF GHK research team know by contacting the research manager, [REDACTED], via email ([REDACTED]) or by telephone ([REDACTED]). If you would like to discuss the evaluation with DECC, please contact [REDACTED] via email ([REDACTED]).

Thanks in advance for your help

Kind regards,

[REDACTED]



Department
of Energy &
Climate Change

Date: 28 February 2014

Subject: Independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO)

Dear Sir/Madam

ICF GHK (www.ghkint.com) has been commissioned by the Department of Energy and Climate Change (DECC) to conduct an independent evaluation of the Green Deal (GD) and Energy Company Obligation (ECO).

A key component of this evaluation is research with businesses offering consumer finance that are not currently registered to deliver GD services.

Your expertise is vital in helping DECC to understand the wider market for consumer finance and the attractiveness of the GD and ECO programme. This is an opportunity for you to contribute to government policy whilst also increasing your understanding of new market opportunities. Your feedback is invaluable as it enables DECC to learn lessons that improve its policies and their benefits to business. It will also inform the independent evaluation and on-going delivery of the GD and ECO programme.

Representatives from ICF GHK will be conducting telephone interviews in March with a selection of businesses in this market and it would be greatly appreciated if you could take part. The interview will last approximately 30 minutes and will take place at a time convenient to you. All the information you provide will be treated with the strictest confidence and ICF GHK will not provide DECC with any information that will identify you or your organisation.

ICF GHK will provide an advance copy of the discussion topics that they would like to cover in order to give you time to prepare.

We hope you participate in this important study, but if you do not wish to take part, please let the ICF GHK research team know by contacting the research manager, [REDACTED], via email ([REDACTED]) or by telephone ([REDACTED]). If you would like to discuss the evaluation with DECC, please contact [REDACTED] via email ([REDACTED]).

Thanks in advance for your help

Kind regards,

[REDACTED]



Department
of Energy &
Climate Change

Date: 2 April 2014

Subject: Independent evaluation of the Green Deal (GD) and Energy Companies Obligation (ECO)

Dear Sir/Madam,

ICF GHK (www.ghkint.com) has been commissioned by the Department of Energy and Climate Change (DECC) to conduct an independent evaluation of the Green Deal (GD) and Energy Company Obligation (ECO).

A key component of this evaluation is research with facilities management and maintenance companies that are not currently registered to deliver GD services.

Your expertise is vital in helping DECC to understand the wider building and construction industry and the attractiveness of the GD and ECO programme. This is an opportunity for you to contribute to government policy whilst also increasing your understanding of new market opportunities. Your feedback is invaluable as it enables DECC to learn lessons that improve its policies and their benefits to business. It will also inform the independent evaluation and on-going delivery of the GD and ECO programme.

Representatives from ICF GHK will be conducting telephone interviews in March with a selection of businesses in this market and it would be greatly appreciated if you could take part. The interview will last approximately 30 minutes and will take place at a time convenient to you. All the information you provide will be treated with the strictest confidence and ICF GHK will not provide DECC with any information that will identify you or your organisation.

ICF GHK will provide an advance copy of the discussion topics that they would like to cover in order to give you time to prepare.

We hope you participate in this important study, but if you do not wish to take part, please let the ICF GHK research team know by contacting the research manager, [REDACTED], via email ([REDACTED]) or by telephone ([REDACTED]). If you would like to discuss the evaluation with DECC, please contact [REDACTED] via email ([REDACTED]).

Thanks in advance for your help

Kind regards,

[REDACTED]

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URN 14D/473