

Deep Dive on Consumer Attitudes Towards Decarbonisation

Prepared for **Ofgem**
September 2020
Research conducted March/April 2020



Summary

In March 2020 Impact, on behalf of Ofgem, conducted qualitative research with domestic energy consumers to understand the range of opinions towards decarbonisation, climate change and energy consumption behaviours. Ten focus groups were carried out across Great Britain.

The consumers we spoke to generally accepted that climate change is real and that action needs to be taken to reduce it. Most wanted to 'do their bit' to protect the environment and many felt the small things they did at home could help (such as recycling or turning off lights in unused rooms).

However, consumers don't always realise the way they use energy has an impact on the environment. Most didn't prioritise it when making energy choices; rather price came first. Indeed many didn't know what more they could do to reduce carbon emissions. Those we spoke to looked to the Government to provide solutions for reducing the impact of climate change.

Research participants were very protective of their existing lifestyles. They wanted to maintain a warm home, minimise effort, and retain access to inexpensive and convenient transportation. This seemed to colour how they responded to the idea of using technologies that produce fewer carbon emissions compared to conventional solutions, such as electric vehicles or alternatives to gas central heating. Many we spoke to (not all) felt that these technologies were unreliable or a greater effort to use – essentially the technology wasn't 'proven' and they wouldn't consider using it (at least at this point in time).

Summary

Other options that could help to reduce carbon emissions like time of use tariffs or smart appliances were often dismissed because they were perceived to require the consumer to pay more attention to how or when they use energy. For example the consumers we spoke to felt they would have to actively choose when to use their appliances or when to turn on the heating, which for some was more effort than they wanted. For some, using appliances at off peak times didn't fit in with existing lifestyles. These solutions need to be targeted to consumers who are likely to gain the most benefit from them.

But perceptions can be changed. The consumers we spoke to valued recommendations from friends and family (who were trusted and similar to them), and if they see or hear positive stories from friends and family they may become more open towards lower carbon technologies. Consumers also said they would listen to messages about the need to change energy use from 'reputable' sources (generally taken to be Government or high profile experts). These channels could be leveraged to great effect.

This research suggests that consumers are at the beginning of the journey towards changing behaviour to help achieve net zero emissions. The consensus in the research was that consumers do care about the environment and want to act in a way that reduces negative impacts, but they need support and incentives to change energy use habits. This is likely to come from a variety of sources, for example vehicle manufacturers, investment in low carbon infrastructure, government schemes or subsidies for low emissions technologies or advocacy from early adopters.

Guide to terms used in this document

Term	Definition
LCT	<p>Low carbon technologies</p> <p>These are technologies that can help consumers lower the amount of carbon dioxide and other greenhouse gases that are released into the atmosphere as a result of their energy use. For example, fully electric vehicles, ‘smart’ home heating controls, ground source or air source heat pumps or home energy generation and storage systems such as solar panels</p>
EVs	<p>Electric Vehicles</p> <p>An electric vehicle is a vehicle that uses one or more electric motors for propulsion, as opposed to the traditional internal combustion engine</p>
TOU	<p>Time of Use Tariffs</p> <p>Time of use tariffs are designed to incentivise customers to use more energy at off-peak times, in order to balance demand. These tariffs charge lower rates at certain times of night or day, when demand is at its lowest, and higher rates at popular times</p>

Guide to terms used in this document

Term	Definition
Smart heating controls	Domestic heating systems that provide the user with much more control over when heating comes on and the temperature. Typically smart heating systems can be controlled remotely via an App (so the user can change heating settings when they are away from home)
Smart appliances	These are appliances that can be set to run at off-peak times via a timer, or if linked to a time of use tariff, appliances can run automatically when the cost of energy falls
Net Zero Emissions	In June 2019, Parliament went beyond the UK's existing commitment to an 80% reduction on 1990 emissions levels by legislating for a net zero greenhouse gas emissions target by 2050. Net zero means any emissions would be balanced by schemes to offset an equivalent amount of greenhouse gases from the atmosphere, such as planting trees or using technology like carbon capture and storage

Research Background and Methodology

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FROM INSIGHT TO INFLUENCE

Introduction

In June 2019, Parliament went beyond the UK's existing commitment to an 80% reduction on 1990 emissions levels by legislating for a net zero greenhouse gas emissions target by 2050. If the UK is to meet the 2050 goal there will need to be changes to the way homes are heated and transport needs to transform. Consumers will have a key role to play in engaging with new technologies and taking the actions required to support decarbonisation.

In November 2019 Ofgem carried out qualitative research through its Consumer First Panel to provide a baseline understanding of consumer opinions about energy use, decarbonisation and how to achieve the net zero carbon emission target.

The research commissioned in November 2019 helped Ofgem to understand consumer opinions, but also raised a number of questions about how attitudes and behaviours varied among certain demographic subgroups. Ofgem wanted to better understand what role it can take in supporting consumers to play their part in helping to achieve net zero emissions and commissioned a further round of qualitative research. This research builds on the findings from the Consumer First Panel to provide deeper insights into the current attitudes and behaviours of different groups of consumers.

Please note: Since this research was conducted in March 2020, Great Britain has entered an uncertain period brought about by the Covid-19 pandemic. This is very likely to impact on consumers' priorities going forward in a number of different areas.

Note on interpreting qualitative research

This report discusses qualitative research findings. Qualitative research provides in-depth information about opinions, but because of the small sample size (74 consumers), results cannot be generalised to the population and should be treated as indicative.

Research objectives

This project focuses on understanding consumer attitudes towards climate change and their role in helping to achieve net zero

The research questions fall into three categories

Attitudes towards climate change and decarbonisation



What are the **differences in attitudes** towards climate change and decarbonisation and to what extent do these drive consumer behaviour?



To what extent are attitudes towards future actions such as changes to home heating driven by **emotional associations** relating to the home?

Perceptions about technology



How **open and ready to changing their behaviour** do people feel?



How important are the actions of **friends and family** in driving decisions that relate to decarbonisation?



What are the attitudes to **new and emerging technology** such as electric vehicles, smart charging, etc. How do these affect peoples' willingness and openness to change?



To what extent does consumer **confidence in digital technology** play a part in behaviour?



How do people feel about **relinquishing control to third parties** and apps to control their energy use on their behalf? To what extent is trust an issue?

Situational factors that may influence attitudes or behaviour



Are there specific **barriers for renters** that impact their attitudes towards decarbonisation actions?



Do **future bill payers** have different attitudes towards climate change?



What **other factors** influence attitudes to decarbonisation?

The target audience

Ofgem had questions about whether particular circumstances, life-stages or adoption of low carbon technology had an impact on consumer opinions towards climate change and decarbonisation

The research was designed to answer the following questions about particular groups of consumers:

- 1 Do consumers who have adopted low carbon technologies have different attitudes towards climate change and decarbonisation?
- 2 Does life-stage have an impact on consumer attitudes towards climate change and decarbonisation?
- 3 Do consumers who rent their homes feel and behave differently compared to those who own their homes?
- 4 Do consumers with low annual household incomes feel and behave differently compared to those with higher incomes?

10 focus groups were carried out. Each group covered one of the audiences of interest

Sample frame

N=74 participants in total

The sample frame ensured that each of the audiences of interest were covered and comparisons between groups could be made. Each group included consumers with common characteristics to create synergy between respondents

1 High Income, Don't use LCT

Educated to degree level and above
OR Household income > £50k

Didn't own any low carbon technologies

2 Private renters

Aged 25 -54 years

Lived in private rented accommodation (not social housing)

3 Retired

Retired

Minimum age of 65

4 Working parents with pre-school-aged children

Children aged 0-6 living at home

One or both parents working full or part time

5 Rural

Consumers lived in a rural location

At least 3 participants in the group are not connected to the gas grid

6 Low Income

Left school at 16 (pre-A-Levels)
Household income <£16k
Struggle to afford to heat home

7 LCT users

Must own either:
-Electric vehicle
-Smart heating controls
-Solar panels
-Energy generation and storage at home

8 Working parents with school-aged children

Dependent children aged 7-18 living at home

One or both parents working full or part time

9 LCT users

Must own either:
-Electric vehicles
-Smart heating controls
-Solar panels
-Energy generation and storage at home

10 Future Bill Payers

16-24 years old

Not/never been responsible for paying energy bills

The Focus Groups

Ten online focus groups were carried out 18th-26th March, covering a range of customers across Great Britain

Leeds

- Retired
- Working parents (kids 0-6)

Edinburgh

- High income, don't use LCT
- Private renters (aged 25-54)

Bristol

- LCT owners
- Working parents (kids 7-18)

Cardiff

- Rural
- Low income

London

- LCT owners
- Future bill payers

Groups were originally planned to run face to face, but the introduction of social distancing necessitated changing to an online methodology

Attitudes towards climate change and decarbonisation

IMPACT

FROM INSIGHT TO INFLUENCE

What are consumers' views on climate change and how does this vary by life-stage?

The consumers we spoke to were aware of climate change and most agreed action is required to tackle it, but without prompting, few understood the link between carbon emissions and climate change.

In this research there wasn't a clear relationship between concern about climate change and taking action based on life-stage. Personal circumstances such as income or whether the consumer rented or owned their home appeared to have greater impact on the likelihood or types of actions taken.

- *Some* consumers in this research commented that the effects of climate change will occur too far into the future to worry about. These consumers also tended to complain that the Government 'moved goalposts,' for example commenting that there were frequent changes in government policy towards diesel cars and (changing) road tax bands on low emission vehicles.
- A few we spoke to believed that the effects of climate change were real, but felt that there was little that individuals could do to tackle it.

"As a young generation we are more interested in trying to be better at it [addressing global warming] but obviously some stuff isn't accessible to us as students. Technically we're not their target audience and as people most interested, it's not something that we can act on."

LCT, Bristol

"From a selfish point of view, it's not in my lifetime so I'm not bothered. You know I'm like 47, so I'll probably be dead in thirty years. So, what I do now isn't going to affect me."

LCT, Bristol

"I feel that whatever I do is ineffective really. That I'm just one householder in one small part of the world. You look at America, and India, and China. What they churn out. I ain't going to make any difference."

Parent (kids 0-6), Leeds

What actions are consumers taking now to help the environment?

Almost everyone spoken to wanted to 'do their bit' for the environment and felt they should and probably could be doing more.

The consumers we spoke to didn't distinguish between behaviours that could 'help the environment' and 'reduce the impacts of climate change'. When asked what actions they were taking, they tended to mention activities such as recycling, turning off lights in unused rooms or choosing a green tariff. They weren't able to articulate how these would help beyond being a good thing to do.

Many didn't know what more they could do or said they needed an immediate benefit to encourage them to change their behaviour. They expected that Government policies would be needed to drive behaviour change.

"I know that obviously climate change is a big thing at the moment. So I think we should try and save some energy, but I don't really know what the effects are, so I'm not as inclined to do it just now. I'm still doing my normal life."

Renter, Edinburgh

"I feel very proud, and I feel as an individual that I do enough for the environment. I hang my washing out when the weather permits, rather than using a tumble dryer and they're all little things which just make you think, well I am doing my bit."

Retired, Leeds

"Well it should be some kind of subsidy from the either energy companies or the Government, because you plonk it all on the consumer. If you put the whole expensive cost of change on the consumer will rebel and either not abide by it or refuse to do it. So, you've got to ease it in gently with subsidies from either the energy companies or the government."

LCT, Bristol

What other factors influence attitudes and behaviour?

Cost

When it came to making energy choices, cost was a major motivation:

- Saving money was a key motivator for changing energy suppliers and making purchasing decisions.
- Some were happy to pay a small premium for a green tariff, but for larger purchases such as a new vehicle, new appliances or home insulation, the desire to save money out-weighed the desire to protect the environment.

Convenience & resistance to change

The consumers we spoke to were protective of their homes and their lifestyles:

- When deciding when to use appliances, to turn on heating or how to travel, maintaining warmth, minimising effort and fitting around life-style were more important than protecting the environment.
- Taking actions that threatened to disrupt existing habits was seen as a challenge, especially for families.

"I think that money is always going to be the incentive, so unless there's a money incentivization. I mean the truth is the biggest barrier to me is I'm lazy, so I don't see an immediate benefit to myself, so I don't do it. I know it's a horrible thing to admit but it's the truth. So unless there was a practical ... benefit to me it's difficult to get yourself out of that habit, isn't it?"

Rural, Cardiff

"When it's winter, it's cold, you want the heating and then we're using more electrical appliances because the kids are - it's raining and so on and so forth."

Parents (kids 7-18), Bristol

"I try to be mindful... but a lot of the time, it doesn't happen. It's like other people are saying. There's lights switched on, the washing machine is always going, when maybe we could do things better. But it's usually a necessity."

Renter, Edinburgh

Attitudes towards technology

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FROM INSIGHT TO INFLUENCE

Current energy use habits

Energy facilitates a comfortable and convenient lifestyle. For most of the consumers we spoke to energy was consumed as needed with little consideration of the impact consumption might have on the environment.

Travel

Convenience was a key driver when choosing how to travel:

- For example, families focused on convenience and being time-efficient, especially during the week to coordinate school runs and work schedules. Some opted to walk or use public transport at weekends when time allowed (and this had the added benefit of getting outdoors).
- In locations where public transport was accessible, some consumers chose to use it over private transportation, but in rural and many regional locations consumers felt they needed to rely on private vehicles to travel around.

Heating

The desire to maintain warmth was a fundamental driver of behaviour. Heating tended to be used in a way that maintained constant warmth without a need to regularly adjust when it was used.

"I start work at the same time that the kids start school. So, though we live in a small radius, because of the small timeframe, we use the car. At weekends we use the bus and walk."

Parents (kids 7-18), Bristol

"I live in on the outskirts of Edinburgh, but I work in Livingston. So there's not a lot of good connections. There is a bus but it's not very frequent and the times and stuff, it just doesn't work. So I end up just driving for convenience really."

High Income, Doesn't Use LCT, Edinburgh

"So it is a concern in terms of I do keep an eye on it, and I try to encourage the kids not to be wasteful. But on the flipside, if I want the tumble dryer on because that's convenient for me, then I do. So there's just a balance between convenience... If I'm cold, I will put the heating up. I won't go and put four jumpers on. So it's just that balance of, it is a concern but I also what to be comfortable."

LCT, London

Why do consumers adopt low carbon technologies?

Smart heating controls

Smart heating controls can help consumers use energy more efficiently. We asked consumers who used these technologies why they did so.

Smart Heating controls

- Smart heating users told us they installed the system to save money (by using less energy), they liked the ability to have greater control of when their home was heated (particularly if absent from home) and the service fitted well with their life-style.
- Further smart heating controls are relatively easy to install and don't require the consumer to change their life-style or habits.

"You can control the heating constantly. When you're out of the house, you can set it. When you're coming home, if you've got a baby, you can set it half an hour before so you're never wasting any energy."

Parent (kids 0-6), Leeds

"I like my home being warm. But, you know, being able to just turn it on just before you get back is ideal. It means you're not worried about setting the timer. Because, you know, I get home from work at different times every day depending on what's, you know, happens in work."

Parent (kids 7-18), Bristol

"I like the convenience of it but you can also do your lighting and stuff by Hive which I really like for times like when you're away on holiday... You could have different lights, different times, and kind of make it look like you're there. That's just another thing that appeals to me."

Parent (kids 7-18), Bristol

Why do consumers adopt low carbon technologies?

Electric vehicles

Electric vehicles (EVs)

Driving electric vehicles can produce fewer carbon emissions compared to vehicles with an internal combustion engine. We asked consumers who used an EV why they did so.

- Those who had an electric vehicle had either had financial assistance (e.g. through work) to purchase one and/or felt there were obvious and immediate financial benefits for using one (reduced fuel costs). Hence, the purchase decision was primarily financially based although consumers with EVs were happy to be 'doing their bit' for the environment.

Passive vs active adoption

- Going into the research, one of the assumptions was that consumers who were using low carbon technologies were actively choosing to do so. However this wasn't the case for a number of consumers we spoke to. Rather, they passively adopted the technologies. For example, by moving into a property that already had solar panels or because their employer arranged their electric vehicle.
- This suggests that there are other ways to encourage take up of low carbon technologies beyond active consumer choice.

"I don't pay any Congestion Charge, so I don't pay for parking. It's very, very cheap compared to a normal car."

LCT, London

"If I hadn't of got it through work I wouldn't have bothered. Like I say we did it from a financial point of view because we get VAT relief, tax relief, we save money personally because we're not putting any fuel in there."

LCT, Bristol

Why do consumers reject low carbon technologies?

There is a degree of resistance to using low carbon technologies. Many of the consumers we spoke to perceived them to be more expensive, less reliable and less convenient than petrol/diesel powered vehicles or gas central heating. Others felt that the technology wasn't proven so wouldn't consider an electric vehicle or heat pump until they saw wide-spread adoption by other consumers.

We covered four different low carbon technologies, discussed below and overleaf.

Smart heating controls:

- Some non-users rejected smart heating because they didn't feel they offered any benefit over their existing heating solutions. Others felt upfront costs would outweigh any savings made from using the systems.

Electric Vehicles (EVs):

- Consumers highlighted a range of barriers to adopting EVs.
 - They were seen as expensive compared to conventional vehicles.
 - Fears about the practicality of EVs persist, for example some felt there were insufficient public charging points, that the range was too limited, that charging would take too long, or that the re-sale value was too low to make them an appealing choice.

"My main concern is convenience of being able to charge... because if I was going to take a long journey, say down to Cornwall, I don't want to be stopping with two children in the car for an hour or so for it to charge."

Parent (kids 7-18), Bristol

"Technology, when it first comes out, is quite expensive. So normally by the time you get a few years down the line it's come down in price quite a bit."

Renter, Edinburgh

"I've got thermostats on each radiator anyway, so I can control that. It's not as though it's a daily thing that I need to do, once it's set. It's set. I don't come home late [laughs]. I know every day, where I'm going to be. It's not as though I'm going to a theatre every night or anything like that."

Retired, Leeds

"If every person who had a car had an electric car and needed to charge it at various times, the entire grid would knock out. It would be completely dead. So the infrastructure's not there, the capacity isn't there."

Parents (kids 0-6), Leeds

Why do consumers reject low carbon technologies?

Time of use (TOU) tariffs

- In this research we only spoke with non-users, who generally didn't own EVs (so weren't the audience who were currently most likely to benefit from a TOU tariff).
- Most **didn't think** a TOU tariff could benefit them. Some couldn't see how they would be able to alter their lifestyle to take advantage of the lower tariffs offered at off peak times. Others wondered how genuine the price saving was – commenting that if everyone changed when they used appliances, then that would just shift peak times and no benefit would be gained.

Home energy generation

- While solar panels were familiar to consumers we spoke to, many didn't consider using them. They were thought to be expensive to install and participants found it difficult to work out how long it would take to recover the investment through energy savings.
- Participants who had solar panels on their homes commented that they had taken advantage of government schemes to help with the cost of installation (and may not have adopted them without this).

"What would constitute it being peak time again because if you started getting up half an hour earlier because you were outside the tariff, how many people would have to get up half an hour earlier for that to then turn in to peak time?"

LCT, Bristol

"Oh, it's all well and good but say if the cheaper times do come during the day and then the majority are still out working ... you will never get the benefit of a cheaper tariff because you're out working."

Low Income, Cardiff

"If I could see the evidence to see that it actually worked and how successful it was, then yeah, I would consider it."

**High Income, Doesn't Use LCT,
Edinburgh**

Other factors that could be used to build awareness about changing consumption behaviours

This research highlighted that some domestic energy consumers didn't realise their energy use behaviours contributed to greenhouse gas emissions, and that low carbon technologies in the market at the moment were unfamiliar or regarded as unproven.

Behaviours and attitudes can be changed. Improving technology could help, but social norms, positive messaging and using relatable terminology can help as well.

The role of friends and family

The research showed that word of mouth from trusted agents (like friends and family) helped to form new habits.

- Family played an important role in increasing awareness of environmental issues, through passing on knowledge and impressing the importance of behaving in certain ways on children.
- Product recommendations helped take up of new technologies.
- Friends and peers also helped to educate.

"I care quite a lot, like I care about the environment a lot. I try and turn off lights. My mum always told me that if I am leaving the room to turn off the light and shut the door and all that so, it's what I'm used to."

LCT, Bristol

"My sister has smart heating and she just said it's the best thing ever. So it's encouraged me to do it as well... Just being able to monitor my heating from wherever I am is really important, so that's definitely something I'm looking into."

LCT, London

"I do care about the environment. I don't know much. I had a massive lecture from my friend, who does politics and she filled me in what was going on with the world and climate change, and near work there was a massive protest going on in London but yeah, I've resources and whatever going on, not my generation, my future kids' generation, it will affect them in the long run."

Future Bill Payer, London

Other factors that could be used to build awareness about changing consumption behaviours

Media

There was also mention of other sources of information such as media and high profile commentators. However, consumers said they needed to be reassured that sources are reputable. This research didn't uncover what makes a source reputable, but consumers tended to refer to well known organisations or commentators such as the BBC or David Attenborough when asked who or what was influential.

Messages needed to be crafted in a way that consumers can relate to

- Terms such as 'decarbonisation' or 'low carbon technology' were unfamiliar and sounded like jargon. Consequently consumers filtered them out or missed the implication of the term.
- Who the messenger is also affects response. For example, high profile activism polarises opinions – some find it annoying, others find it interesting.
- If the language is changed to terms that consumers can relate to, using media that is trusted and voiced in a way that is positive, then the chances they will take note of messages about the environment or how to change behaviour will improve.

"Smart green technology or something like that."
Renter, Edinburgh

"I think just eco-friendly."
LCT, London

"It could be something I've seen on the news, it could be a certain TV programme that's talking about an investigation that's been going on. Some articles that have come in, some of the email newsletters I'm signed up to, something someone's mentioned, articles in newspapers and magazines."

LCT, London

"You can do a lot of research online, but then it's whether that website is reputable enough to be able to have the correct information you're looking for... So you need to be able to be sure about what you're reading. Because as you know, we keep getting hit with false news, and God knows."

Retired, Leeds

"The worst thing that came out of this environmental change campaign is that Greta or whoever she is, because she irritates me so much she's actually put me off everything, I can't bear to watch her and it's actually switched it all off a bit for me."

Rural, Cardiff

"Not everyone knows that carbon is the main contributor to environmental impact so if they don't know they don't really care."

Parent (kids 0-6), Leeds

Situational factors can prevent consumers from taking action

- Households with young children struggled to carry out relatively simple things like turning off unneeded lights. Those with teenage children (who often didn't understand the connection between their behaviour and the impact on bills) have other challenges, such as having to contend with multiple devices continuously on charge. In both cases, doing more was not perceived to be easy.
- On the other hand, future bill payers living away from home tended to put on extra layers of clothing rather than turn up heating, when cold – but admitted this was due more about saving money than helping out the environment.
- Those who rented their homes commented that many things about their home energy usage were beyond their control, for instance installation of smart meters or energy-efficient appliances.
- People generally wanted to live in a warm and welcoming home, which tended to incline them to run their heating systems whenever they felt they needed to (although as noted earlier, students didn't always do this).

"Well I struggle, I'm not going to lie, I mean there's days where I stick a dressing gown and a cardi on just so I haven't got to turn it on unless the children are really cold."

Rural, Cardiff

"Well, you mentioned the smart appliances and stuff. Obviously when we got the flat it was white goods included. So it's not my choice for the fridge to potentially cost us more to run. You've mentioned quite a lot of ways that we could save, but they're out with our control because we're just renting."

Renter, Edinburgh

"Yeah, I don't tell the kids that they cannot put the heating on, but I do go round behind them turning lights off."

High Income, Doesn't Use LCT, Edinburgh

Annex – Definitions of Group Participants

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FROM INSIGHT TO INFLUENCE

Definitions of the participants in each group

1 High Income, Don't use LCT

- Social grade: ABC1
- Age: 25-35 yrs. (x4), 36-58 yrs. (x4)
- Working status: All full time
- Tenure: Mortgage (x5), Rent PL (x1), Rent LA (x1), Owner (x1)
- Kids at home: None (x4), 0-6 yrs. (x3), 16-18 yrs. (x1)
- HH income: £25-£35k (x2), £50k+ (x6)

2 Renters

- Social grade: C1/C2
- Age: 25-35 yrs. (x5), 36-54 yrs. (x4)
- Working status: All full time
- Tenure: Rent PL (x8)
- Kids at home: None (x4), 0-6 yrs. (x2), 0-6 and 7-18 yrs. (x2)
- HH income £9.5-£16k (x2), £35-£50k (x2), £50k+ (x4)

3 Retired

- Social grade: C1/C2
- Age: All 65+ yrs.
- Working status: All retired
- Tenure: Owner (x4); Mortgage (x3); Rent LA (x1)
- Kids at home: None (x8)
- HH income £16-£25k (x2); £25-£35k (x2), £35-£50k (x3), £50k+ (x1)

4 Parents with pre-school-aged children

- Social grade: C1/C2
- Age: 25-35 yrs. (x5); 36-46 yrs. (x2)
- Working status: Full time (x4), Part time (x4)
- Tenure: All mortgage
- Kids at home: All 0-6 yrs.
- HH income £25-£35k (x2); £35-£50k (x4), £50k+ (x2)

5 Rural

- Social grade: BC1D
- Age: All 36-62 yrs.
- Working status: All full time
- Tenure: Rent HA (x2), Mortgage (x2), Owner (x1), Rent PL (x1)
- Kids at home: None (x3), 0-6 and 7-18 yrs. (x1), 7-15 and 16-18 yrs. (x1), 16-18 yrs. (x1)
- HH income: £16-£25k (x3), £25-£35k (x1), £50k+ (x2)

6 Low Income

- Social grade: C1C2D
- Age: 25-35 yrs. (x3), 36-56 yrs. (x3)
- Working status: Part time (x4), Not working (x2)
- Tenure: Rent PL (x3), Owner (x2), Rent HA (x3)
- Kids at home: None (x3), 7-15 and 16-18 yrs. (x2), 16-18 yrs. (x1)
- HH income: <£9,5k (x3), £9.5k-£16k (x3)

7 LCT

- Social grade: BC1
- Age: 25-35 yrs. (x4), 36-60 yrs. (x3)
- Working status: Full time (x4), Student (x2), Retired (x1)
- Tenure: Mortgage (x3), Rent SHR (x2), Rent PL (x1), Owner (x1)
- Kids at home: None (x4), 0-6 yrs. (1), 7-15 yrs. (x1), 16-18 yrs. (x1)
- HH income: <£16k (x2), £25-£35k (x1), £35k-£50k (x1), £50k+ (x3)

8 Parents

- Social grade: BC1
- Age: 25-35 yrs. (x2), 36-55 yrs. (x6)
- Working status: All full time
- Tenure: Mortgage (x5), Owner (x1), Rent PL (x1), Rent HA (x1)
- Kids at home: 0-6 and 7-15 yrs. (x1), 7-15 yrs. (x5), 16-18 yrs. (x2)
- HH income: £9.5-£16k (x1), £16-£25k (x1), £35k-£50k (x3), £50k+ (x3)

9 LCT

- Social grade: BC1C2
- Age: 25-35 yrs. (x4), 36-61 yrs. (x4)
- Working status: Full time (x7), Part time (x1)
- Tenure: Mortgage (x6), Owner (x1), Rent PL (x1)
- Kids at home: 0-6 and 16-18 yrs. (x1), 7-15 yrs. (x1), 16-18 yrs. (x1)
- HH income: £25-£35k (x1), £35k-£50k (x2), £50k+ (x5) incl. 2 £100k+

10 Future Bill Payers

- Social grade: BC1C2
- Age: All 17-24 yrs.
- Working status: Student (x5), Full time (x2)
- Tenure: Live with family/partner (no rent)
- Kids at home: None (pre-family)
- HH income: £35k-£50k (x3), £50k+ (x5)

Tenure abbreviations: PL = Private Landlord; LA = Local Authority; HA = Housing Authority, SHR = Shared House or Room; Owned = Owned outright.

THANK YOU

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All projects are carried out in compliance with the ISO 20252 international
standard for market, opinion and social research and GDPR.



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IMPACT

FROM INSIGHT TO INFLUENCE