Empowering climate action:

Inspiring and supporting consumer participation in the energy transition

October 2021

nationalgridESO

Contents

Foreword

People are changing the way they think about climate change and the environment. Perhaps a David Attenborough documentary caught their attention, they're worried by the increase in extreme weather, or their child took part in climate protest. Whatever the reason, it is clear the British public recognises that climate change is real, and we need to do something about it.

As Great Britain's Electricity System Operator, we sit at the heart of the energy system and part of our role is about building a greener system for the future. We are driving change in the energy industry, and want to see the electricity system lead the way to net zero. That is why we are transforming our approach to system operation to make sure that by 2025 we can run the system with zero carbon emissions some of the time, building to zero carbon operation all of the time by 2035.

Our annual Future Energy Scenarios (FES) explore how we can achieve these goals and the UK's ambition for net zero by 2050. We gather insight from hundreds of industry stakeholders every year, combine it with our own analysis and lay out how the energy system, and the sectors it supports, will need to transform by 2050.

A clear message from FES 2021 is that we need to transform industry and society to meet these goals. So we polled over 4000 members of the public and held 12 focus groups to better understand the British public's view on the UK's climate agenda and how they can get involved.

The UK's progress to reduce emissions has been impressive – cutting carbon emissions in half in the past 30 years - but 71% of the British public think that emissions have actually increased. In the focus groups we found that informing the public of the UK's progress actually inspired them to want to do more.

What citizens want and need to see is the impact that actions such as switching to electric vehicles (EVs), heat pumps or solar panels are having - whether in their everyday lives through cleaner air or lower running costs of everyday activities, or the collective impact on emissions reductions.

From our research it is clear that different types of consumers across the country face different challenges when it comes to being enabled and empowered to participate in, and benefit from, action on climate change.

Delivering an affordable, secure, clean energy system remains vital for us as a business and stakeholders across the industry. We'll make sure the insights from this research are used to support and champion consumers in the energy transition.

Jake Rigg
Corporate Affairs Director
Electricity System Operator (ESO)

Executive Summary

Executive Summary

1 Public concern about climate change has risen rapidly.

It now ranks alongside recovering from Covid, the quality of the NHS and the state of the economy in the most important issues facing the country. But concern, and understanding, vary substantially across the British population and 'experts' do not speak in a language that they understand. Seventy-three per cent support or strongly support the Government's plans on net zero once explained, but only 40% of the population think they have definitely heard of the legal requirement to meet net zero.

2 Understanding how society needs to transform to meet the UK's climate change ambitions is an important part of National Grid ESO's Future Energy Scenarios.

This report deepens the ESO's understanding of public appetites for behaviour change and we are sharing these insights so that others in the sector – and beyond – can benefit from this new approach as we all work together to reach net zero by 2050.

3 The public's understanding of climate change, and progress that the UK has made in emissions reductions, impacts the role that they believe individuals need to play to support climate action.

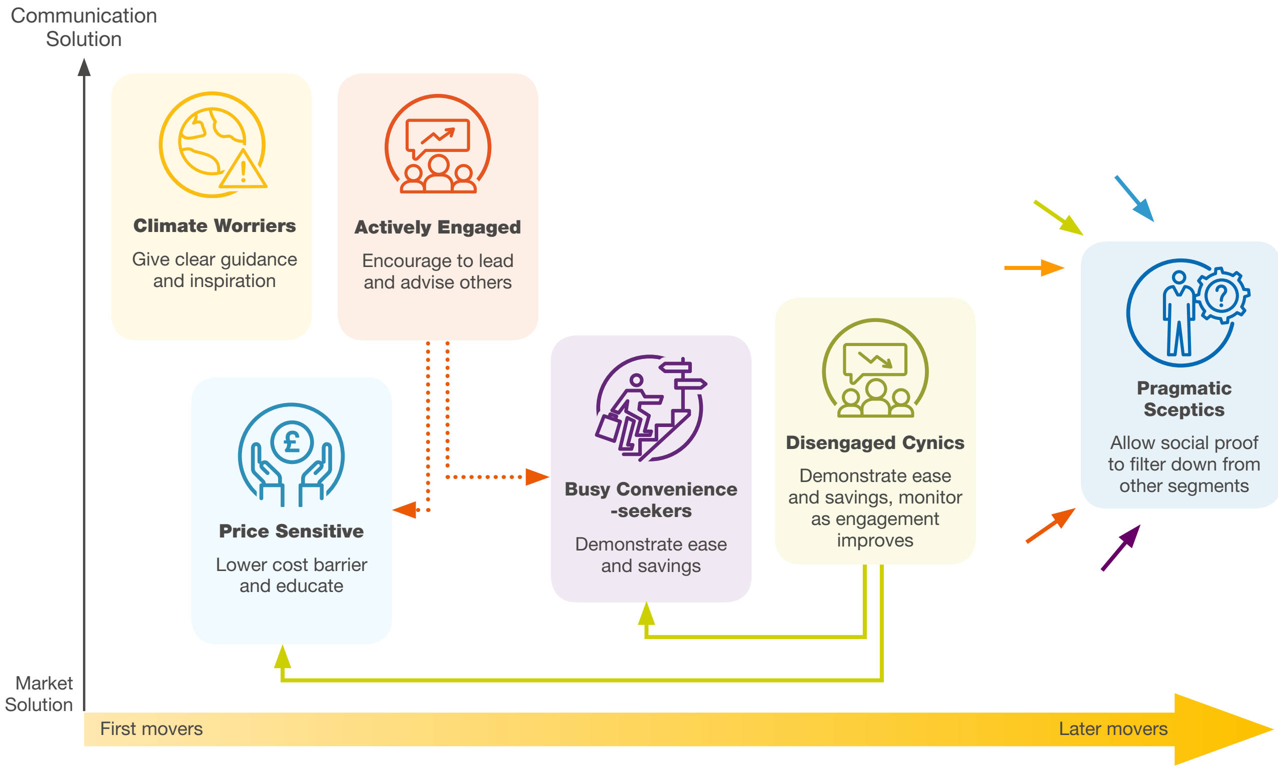
Seventy-one per cent of British consumers think UK emissions have actually increased. When the reductions achieved so far were explained in focus groups, the respondents told us that this motivated them to take further actions although they worried that it could lead to complacency among others.

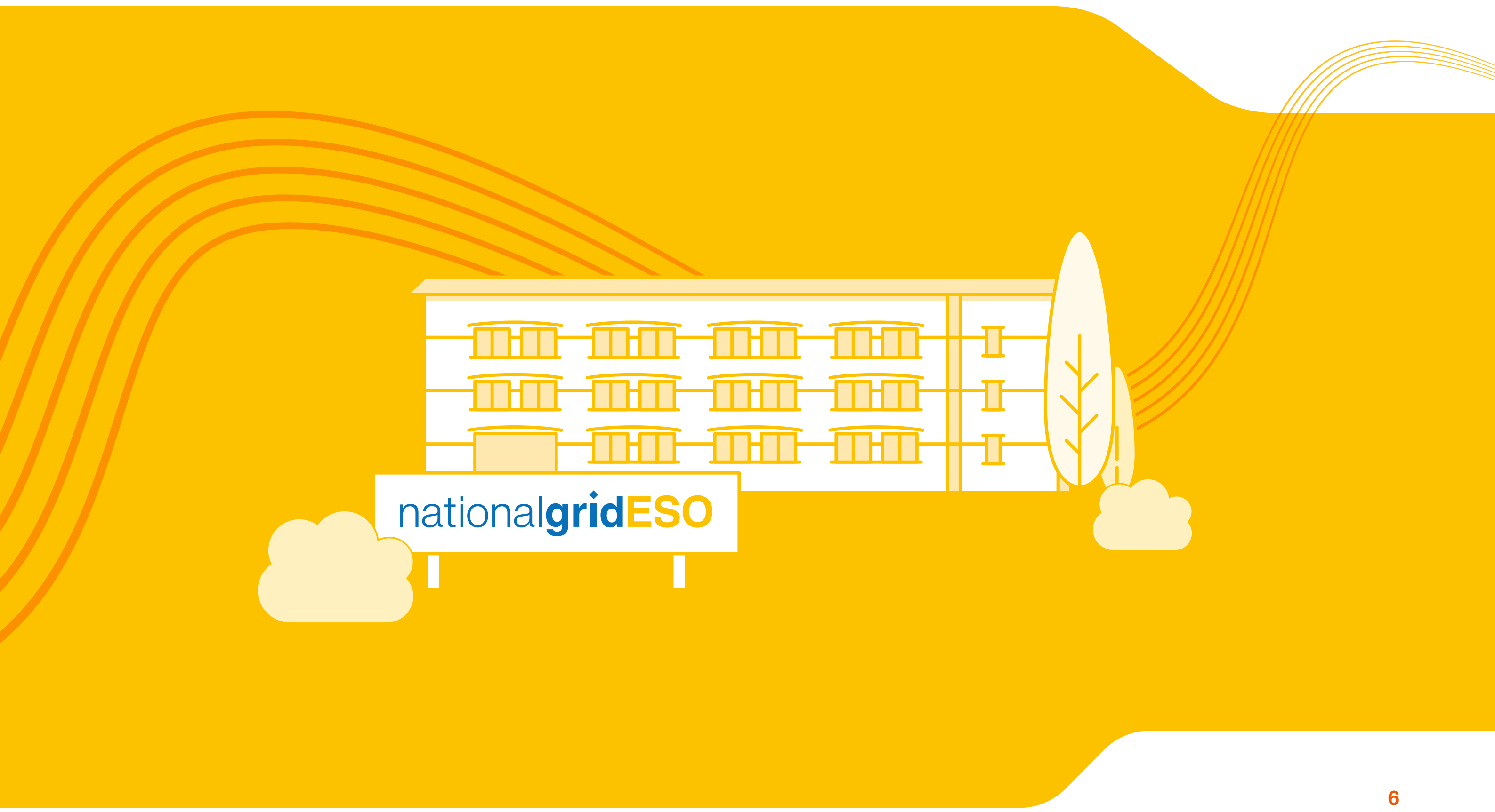
4 We need to better understand the barriers and motivators for different members of the public to enable and empower actions that can support the UK's climate change targets, including the adoption of smart and green home technologies and services.

This research identifies six key segments of the population – each requiring a slightly different approach. Our recommended strategy is described in detail in the body of the report but can most simply be summarised as focussing our firepower on the three most engaged segments (which together make up 56% of the population) by using three allied but distinct strategies:

- *Giving clear guidance and inspiration,*
- *Lowering costs, and*
- *Encouraging leadership.*

Engagement Roadmap





Introduction

Introduction

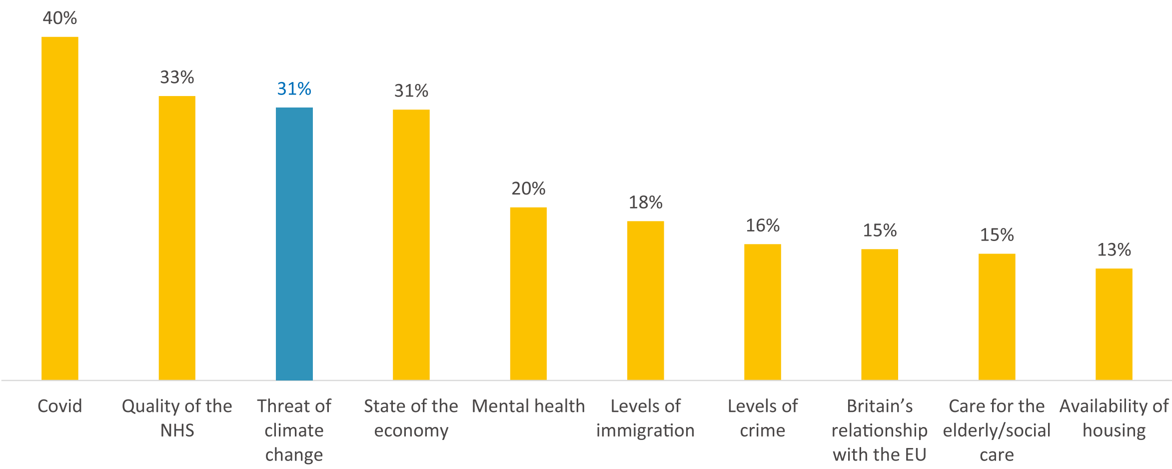
The Electricity System Operator (ESO) commissioned Public First to run an in-depth opinion research exercise to establish people's views and attitudes to energy and climate change. The purpose was to find out what people are already doing, what they might be persuaded to do in the future and what engagement strategies might best provide the nudge to make environmentally-friendly lifestyle changes.

This research is important because it will allow us to gear our own scenario planning around the real, lived experience of energy consumers. Until now, the ESO has used its technical expertise and vast data banks, combined with extensive market and stakeholder feedback, to model possible options for the future of energy and energy use. We wanted to take this a step further and find out what the barriers that people face so that the ESO can have a better understanding of what solutions may help. Scenario modelling on its own will not be enough to help meet our climate change targets, people need to respond to the challenge by taking the necessary actions to reduce the impact they are having on the planet.

We found that concern about climate change is increasing across all demographics and is now a top-tier issue ranked alongside the NHS and the state of our economy.

Chart1: The most important issues facing the country

Which do you think are the most important issues facing the country at this time? [select up to three]



However this does not necessarily translate into individual willingness to take action to help tackle climate change – nor does it mean that everyone understands the same thing by it when they talk about climate change. Often we, the professional and expert stakeholders, are confusing the issue by being too specialist in the vocabulary we use around net zero, carbon budgets, and greener home and travel options. If we want to spur the public into action to shift their behaviours and adopt more environmentally friendly lifestyles, we need to be more targeted, nuanced and less specialist in the way we market and communicate messages about climate change.

The public's understanding of climate change and progress that the UK has made in emissions reductions impacts the role that they believe individuals need to play to support climate action. One of the most important nuances to understand from this opinion research is around what people mean when they talk about climate change. For some (and especially the less engaged) it is tangible environmental issues like waste, air pollution, litter, and plastics in the oceans. For others it is more abstract – carbon dioxide emissions which are causing sea level rises from melting ice caps and temperature extremes.

To date, a lot of the action taken in the UK on climate change has been relatively 'behind the scenes', resulting in significant emissions reductions in the past three decades. Despite this, 71% of the British Public think UK emissions have actually increased. Through focus groups, it is clear that domestic consumers want to know more about the progress made in the UK to reduce emissions, how this impacts emissions globally, and the impact that the changes they are making in their own lives are contributing, or could contribute, to action on climate change.

When asked about the climate change effects they are most worried about, 41% of the public point to 'harmful effects on wildlife and nature', 36% to 'harm to the planet that my children and grandchildren will live on' and 32% to 'dramatic changes in temperature'. These insights matter because what people understand by 'climate change' determines what they think needs to be done to mitigate its impact. That can range from reusing supermarket carrier bags to replacing gas boilers with heat pumps, and driving EVs – and everything in between.

We need to better understand the barriers and motivators for different members of the public to enable and empower actions that can support the UK's climate change targets, including the adoption of smart and green home technologies and services.

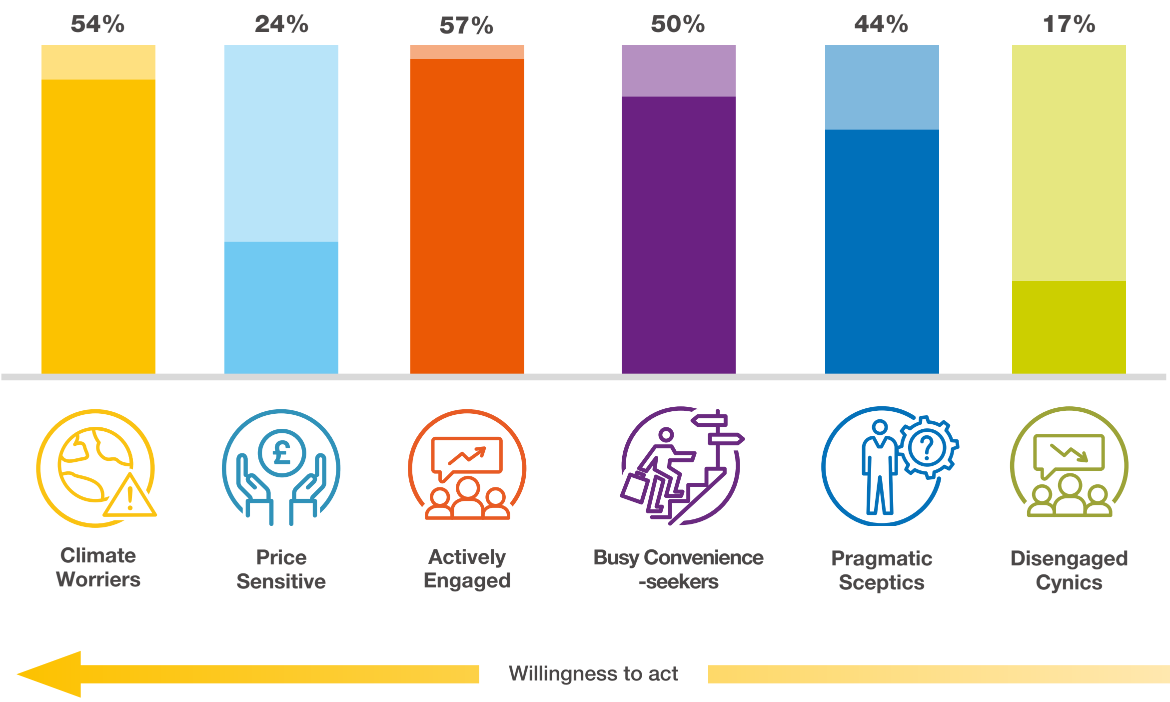
To better understand these variations in awareness, concern and understanding of climate change and how consumers can be supported to take up 'green' options, our research set out to define segments of the British population who share clear sets of characteristics and attitudes. These segments encapsulate people's views of climate change, what they understand by it and how mobilised they are by issues such as cost, disruption, and trust, and who they think is responsible for dealing with climate change.

Another important insight to emerge is that when we use the word 'disruption' not everyone understands it to mean the same thing. For some, it is that any minor inconvenience that involves changing their day-to-day routine is too much and acts as a barrier. For others, the disruption and inconvenience comes from the amount of time spent researching green alternatives while some people find the hassle of building works associated with insulation, replacing boilers or installing charging points too much. As we build on this work, we need to ensure that we understand exactly what consumers mean so that we might help overcome those barriers.

In a similar vein, it is clear in many focus groups that discussions of cost differentiate substantially between upfront costs and ongoing cost of living. In more affluent segments there was appetite to take steps towards increased energy efficiency – as long as high upfront costs can somehow be spread. In other segments where household budgets are tighter, the cost of living is a day-to-day concern for them. Upfront costs mean a product will not even be considered but running costs are also a factor. It is vital that both communications and financing solutions take into account these variations.

Testing these characteristics in focus groups allows us to paint a clearer picture of the different segments; to understand better what their interests are and the best possible entry point to engage them in a meaningful conversation about climate change and the changes they might be willing to make. For example, while all participants of our focus groups had some grasp of what was meant by climate change, and some idea that tackling it was an urgent task, awareness and understanding of the Government's net zero target varied significantly between segments. Notably this variation in *awareness* is not clearly correlated with the level of *concern* about climate change exhibited by each segment.

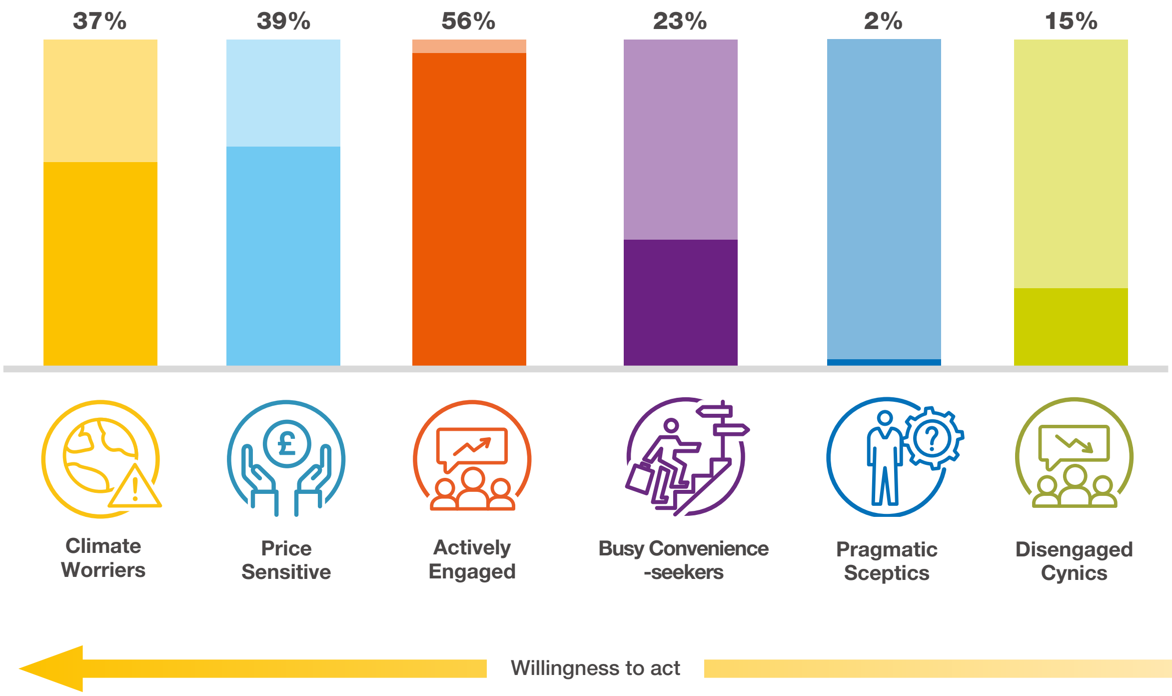
Chart 2: Have you heard of the Governments plan to reach net zero?
In 2019, the UK Government made it a law that the UK must achieve Net Zero by 2050. Prior to taking this survey, had you heard of this plan? [% Yes, I have definitely heard of it]



Similarly, some groups that show relatively little concern about climate change in our poll are still able to offer remarkably coherent arguments for why more should be done on the topic – without any prompting – in our focus groups.

Chart 3: Percentage choosing climate change in the most important issues facing the country?

Looking at the list below, which do you think are the most important issues facing the country at this time? [% selecting Climate Change]



Using these important indicators, along with a variety of others and our observations from 12 focus groups involving participants from across Great Britain, we have established which groups should be the focus of early communications in order to speed behaviour change and support adoption of green and energy-efficient options, as well as the groups where more work may be needed. For each segment we have identified the key barriers to action and, the potential incentives that can be used to empower and enable each group.

This report comes against a backdrop of the UK hosting COP26 and the opportunity for climate action on the one hand, and public concerns about rising prices and energy insecurity on the other. It is important, that this research is put in a wider context of what is possible for people now and in the future.

Our findings show that there is a wide spectrum of awareness and understanding of what people ought to be doing and what they are doing already. For some people, barriers to becoming climate-friendly at home are a matter of convenience and not having to make too many (or any) sacrifices. For many others, taking the 'green' option is still an aspiration that is financially out of their reach. It was a striking feature of these focus groups that while there remains residual suspicion, general confusion and lack of awareness about technologies such as smart meters, solar panels and EVs, there has been a decided shift in public attitudes from viewing these as odd or sub-par options, to them being seen as increasingly *aspirational* but unattainable.

A note on 'net zero'. When we asked people in a poll if they have heard of net zero, relatively high numbers say that they have definitely or possibly heard of it (72%). This is not reflected in focus groups where very few people have heard of it. However, understanding of net zero is increasing and a poor grasp of 'net zero' should not be mistaken for not knowing anything about climate change and the environment. Awareness of the issue and steps that could and should be taken is high and increasing.

The fundamental will is there. Two thirds of Britons (63%) want to know more about what they can do to reduce climate change. The task now is to turn this willingness into practical and meaningful action – who is most likely to make changes and what might those changes look like? Who might switch to an electric vehicle, insulate their homes and replace their boilers with a heat pump? What are the barriers – and opportunities – for them to do so?

Table 1:

Which of the following actions have you taken in past five years? Select all that apply / [If not taken already] How likely or unlikely are you to take these actions over the next five years?

	Which of the following actions have you taken in past five years? Select all that apply	[If not taken already] How likely or unlikely are you to take these actions over the next five years?
Turning down my heating to use less energy	58%	60%
Reducing car use and instead walking, cycling or using public transport	40%	42%
Purchasing goods which are more environmentally friendly, even if it means paying more	32%	42%
Switching to a ‘green’ energy tariff	27%	52%
Upgrading roof insulation in my home	16%	29%
Switching to an energy tariff that is cheaper at certain times of day	13%	52%
Upgrading wall insulation in my home	13%	24%
Switching to an energy tariff that allows my energy provider to tell my appliances when it would be cheapest to run	11%	47%
None of the above	17%	N/A

For most people, the changes they feel they can make are small: recycling a little bit more, reusing carrier bags and buying loose fruit and vegetables at the supermarket. For some people, that is the limit of what they are able or prepared to do and feel that they are ‘doing their bit’. For others, though, there is a growing feeling of impotence – that climate change is just too big, that the floods in New York and Germany, the devastating forest fires in Australia and elsewhere are signs that perhaps it is too late already.

This research seeks to identify the messages and support that will work best with different groups to help educate, empower and enable people to take positive actions in their lives and make the changes that will have an impact on reducing carbon emissions.

Methodology and Segmentation

Methodology and Segmentation

This study began with an online poll of 4,211 residents in Britain conducted 10-20 August 2021. The results are weighted by age and gender as well as region and social grade to nationally representative proportions. Full data tables are available at www.nationalgrideso.com

The poll was used to group respondents by attitude on the basis of the following questions:

- How severe they believed the issue of climate change to be.
- How aware they were of Net Zero legislation, whether they supported it, and how confident they were that the target would be reached.
- How they viewed environmentally-friendly decision making: whether it was expensive or a fad, for example.
- What would encourage people to do more for the environment, for example, lower costs, more practical options, seeing that others were doing more.
- How easy people find it to keep up with the latest information and advice on the environment, and whether they want to know more about what they can do.
- Whether it is the Government's job to do more, whether this should be done with guidance or law, and who else should have responsibility for different aspects of climate action.
- Whether Britain should do more even if other countries do not.
- How much of a consideration the environment is when people buy different products.

We split the responses into 'segments' that contain individuals who are similar to one another in their responses. Not every person will fit perfectly into the segments as described and others will find similarities with different groups. Equally, not every segment will have a different view on everything. There are some questions where majority opinion will hold across all the segments. There are, though, crucial areas where differences become clear, and these are the focus of this analysis.

What you will not see in this report is a great deal of discussion of age differences. Until now, age has often been viewed as a key determinant of pro-environmental attitudes with younger people expected to be more engaged by this topic than older people. However, our quantitative work shows that this is not so clear cut. For example, 28% of 18-24 year olds place the climate among their top three issues, compared to 33% of those over 65, making it the third most important issue for 18-24s and the fourth for those 65 or older.

To untangle this, we ran a series of regression analyses with the goal of working out whether age has an impact on opinions on the climate. Age has a small but statistically significant correlation with how serious a person considered the issue of climate change to be: younger Britons are generally more likely to think the threat is severe. But this is vastly overtaken by the relationship between formal education and belief in the severity of climate change where 77% of university graduates believe climate change to be the single most important issue at the moment (or one of the most serious issues), compared to 66% of non-graduates. To comport the two effects, the impact of *not* having a degree is equivalent to 100 years of aging.

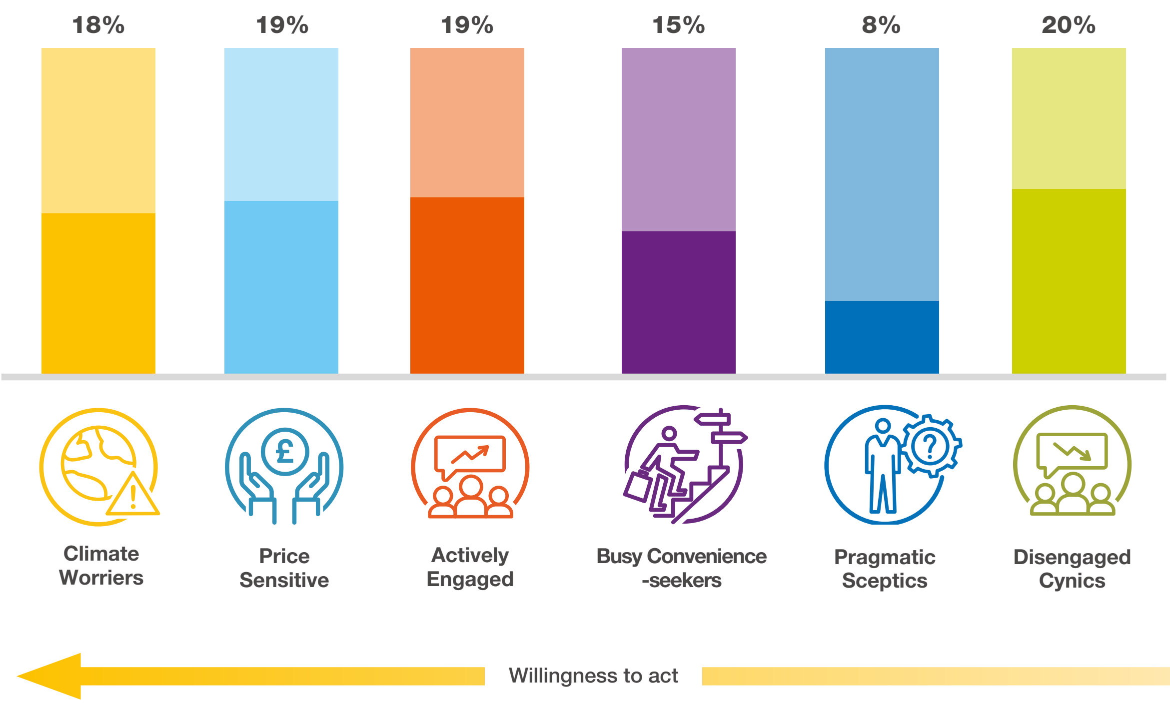
A key insight identified in this research, is that the age trend on climate change opinion is not nearly as large as might be expected – or as large as it has been in the past. For example, the segment that is most profoundly anxious about climate change is also the oldest. We believe that this change is the result of increased top-level engagement with the issue that impacts all age groups, but that there may be underlying differences in the opinions that produce these results. For example, younger people are considerably more likely to trust Greta Thunberg on climate change and are more likely to keep up-to-date on the latest advances in environmentally-friendly technologies.

So, while superficially age has minimal impact on *concern* for the climate, how that concern is displayed and acted on may differ considerably by age. These differences are important if we want to understand how best to motivate people into living more climate-friendly and environmentally-conscious lifestyles and will be captured within each segment archetype. For that reason you will see descriptions of the age characteristics for each segment as you meet them.

The segmentation and regression analyses helped us to divide the population into six categories:

Chart 4: Size of each segment

Prevalence of segments in the population



Once we had established these focus groups, we recruited participants from each of these segments to attend online focus groups (two for each segment) with between four and six respondents per group, conducted 14-16 September 2021. By using online focus groups we were able to include participants from Blackpool to Plaistow, Bristol to Newcastle. In these groups it became clear that the key areas of difference and similarity were:

- **Concern** about climate change and the extent of that concern.
- **Awareness** of climate change, the language used as well as news awareness more generally.
- **Definitions** and what people meant by climate change, whether it was about waste and the environment or whether it was about climate, net zero and carbon emissions.
- **Trust** was a key dividing line between those who trusted government and media and those who emphatically did not.
- **Cost and convenience** were drivers for all groups but mattered most for some – those who were not able to make some of the changes expected of them.
- **Responsibility** and where this should lie. Should individuals act and encourage others to do the same or if it was down to Governments, nations and large corporations to make the necessary changes?

In the following pages we describe each segment in detail. For each we offer an overview of their demographic features, their reactions to each of these 'dividing line' topics and our recommendations for how to engage them. In some cases, you may find that the numbers in our charts sum to 99% or 101%; this is due to rounding and full details can be found in the data tables.

Climate Worriers

Climate Worriers

"I worry that we won't have places where humans can live. I worry that it's going to be the end of the world or that there might not be habitable places on Earth anymore. And I think that will happen sooner than I expect."

- Focus group participant

Climate Worriers represent 18% of the population. They are the oldest of the segments with 55% being 55 or older (in contrast with 35% of the sample as a whole) and therefore also far more likely to be retired (30% as opposed to 17% of the whole sample). They have the highest levels of home ownership (73% own their own home, 62% of the total do), and are the least likely to have children living at home. This group is more likely to have voted Conservative (42%) than Labour (25%) at the 2019 General Election and is among the highest group represented in the AB socio-economic grouping [see Appendix A for more on socio-economic classifications]. They are highly engaged and aware both on current affairs more generally and climate change in particular. This group regard climate change as an existential threat and understand it as carbon emissions destroying the planet more than waste and air pollution.

Concern

In our focus groups it became clear that this was a group of worriers. They were highly informed and worried about everything – including climate change. They scored second highest on concern about climate change (37%) when selecting issues of concern in contrast with 31% of the rest of the sample. Eighty-five percent (versus 71% of the total) thought that climate change was the most or one of the most serious issues facing the country today.

What was clear in the focus groups was that they found the whole concept of climate change so overwhelming and enormous, that it felt almost impossible to know what to do. The word 'impotent' came up more than once when talking about climate change.

> *"I think I'm more worried than most – and there's how impotent I feel. I eat meat only once a week. And now when I talk to my partner, we talk about having a kid not kids because of the impact of humans on the planet. Forest fires scare the s*** out of me. It's hard to convince people to do something while they're not experiencing it, short of shipping everyone out to Australia to see the forest fires for themselves so I don't know what we should do."*

Unlike the Actively Engaged group who scored more highly on concerns about climate change but who felt confident about how to deal with it, this group was distressed by it. Climate change was the first issue they raised and it was difficult to try and get them to talk about anything else once they were on the subject.

Even when they spoke of other issues, such as Covid, these were seen through the lens of climate change.

> *"It would cost a fortune, but we've been bombarded with news on Covid so maybe we should have regular highlights on climate change. In fact, the companies should be made to pay to make us all aware. Then you see the fires and the crazy floods and if you ask me what my country is doing about it to stop this, I honestly couldn't tell you."*

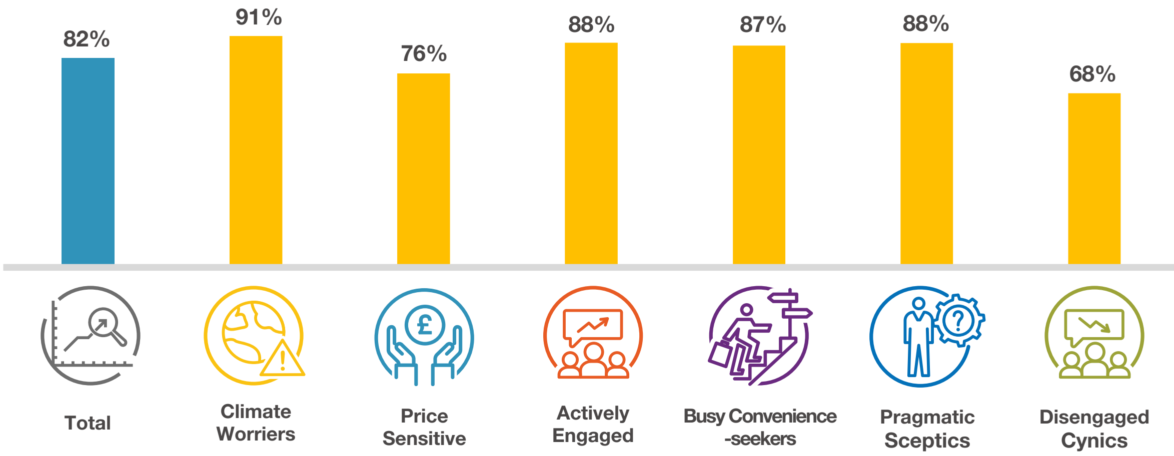
Climate Worriers were not just worried about climate change, they were scared. They thought that the world would end, sooner rather than later and that they personally would be impacted.

Awareness and definitions

This group was highly aware and consumed a vast amount of news and information. They had the highest awareness of the ban on petrol and diesel cars (91%) of all the segments as well as saying that they had heard of government's net zero plan (87% said they had heard of it as opposed to 72% of the whole sample).

Chart 5: Awareness of a new petrol and diesel car ban

The Government has announced a ban on the sale of new petrol and diesel cars by 2030. Before this poll, were you aware of this? [Total 'Yes, definitely' + 'Yes, I think so']



When they talked about climate change, the Climate Worriers spoke about extreme weather events but, unlike other groups they also discussed energy and energy consumption as being part of the problem. They were concerned about waste and plastics, but their understanding of climate change was at a far more sophisticated level than any other group.

> *"I got my annual energy bill and I was horrified to see that I was well past my gas usage. That sort of information makes me take notice – it's costing me more money and the impact on the beautiful environment."*

Trust, cost and convenience

Although more likely to be affluent, cost was still a driver for Climate Worriers: 89% said they would make changes that were more environmentally-friendly if they were cheaper (total sample was 78%) and 60% would make changes if they were less disruptive (as opposed to 57% of the total sample).

This group had moderate trust levels (third highest of the segments). They trusted people like Martin Lewis and David Attenborough to tell them about climate change as well as friends and family. They did not trust large corporations, and this came out particularly strongly in the focus groups.

> *"I'm going to try and go electric with my car but you're not helped. Like the car manufacturers, they just see it as an opportunity and hike prices up."*

Neither trust, cost nor a lack of convenience were barriers in the same way as they were for others. In fact, cost for this group was seen as a motivator – by making the climate-friendly options cheaper, they hoped that more people would make the necessary changes. They themselves were even willing to pay a bit more.

> *"For me it's from a selfish point of view. It's the bills. Recently I've become conscious of water because of the bills. My hope is if people are hit in the pocket, then they'll change."*

> *"I think we need to make it easier for people to make the right choice. They can go in a shop and if two pairs of jeans have to have labels on to say, for example, how much water they used, then you can choose if you want to pay £10 more for a pair that's used less water. But you need legislation to force manufacturers to label."*

Responsibility and action

Although this group felt impotent at the magnitude of climate change, they did still believe in individual responsibility and felt that their own actions could make a difference (67% thought so in contrast to 58% of the whole sample). They were still doing their bit but worried that this really was not going to fix climate change. They felt that larger countries such as India or China and large emissions-intensive corporations would have cumulatively far greater impact than they would.

This was not an excuse for not taking action in the way that it might be for others, but rather a reality check. Seventy-four per cent thought that the UK should do what it can to combat climate change even if other countries do not (compared to 61% for the whole sample) and they have so far adopted products and services such as solar panels, smart meters and green energy tariffs at rates close to the national average. Possibly because they have already made these changes – or because they feel paralysed and worried about doing the 'wrong' thing, this group showed lower than average willingness (in our poll) to take more action on reducing their energy needs over the *next* five years.

Climate worriers thought Government had a big role to play, particularly in educating people on how important climate change is, and believed that more needed to be done to communicate to everyone what measures people should take that would make real impact.

> *"I have actively googled what can I do and they're just small things. Where do I find the big things that I can do? There don't seem to be any simple step-by-step like this and this and this."*

Reaction to falling carbon emissions

When asked in polling whether carbon dioxide emissions had increased, decreased or remained the same over the past 30 years, overall this group was slightly more likely than average to believe (incorrectly) that emissions have increased (76% versus 71%). After discussion in focus groups, they speculate that emissions may have decreased and weren't as impressed as other groups by UK progress in emissions reductions. Additionally, some put reductions down to the fact that we had merely shut down manufacturing in the UK and offshored our emissions. This was an interesting consequence of being a highly informed and engaged group and is an important cautionary sign on the need for transparency of how reductions are being achieved as the public becomes more informed.

> *"It's a relatively misleading number. We've offshored our emissions, sure, so we might not be emitting them here, but another country is, and we're not consuming any less – the opposite, in fact. It's got nothing to do with our behaviour. So I think that's quite a dangerous piece of information because it will make people complacent."*

Recommendations for engagement

This is a high target group: *it has the concern and the affluence to make real change. They need to be persuaded that it is not too late and that changes they make will have an impact. This could be a first-mover group.*

This group scores around average or below in our polling for most steps taken to help reduce climate change so far (or willingness to commit to them in the future) – whether that is installing a smart meter or reducing car usage. The only exception to this was turning down their heating and moving to a green energy tariff. This suggests that their clear concern about climate change is either making them feel impotent to do anything (it's just too big) or that they are general worriers about many different issues. Either way, our focus must be firmly on clear instructions about the changes they might make to their lifestyles – and persuading them that what they do will make a difference.

This group wants more information and step-by-step guides of what they should do to help combat climate change. They are engaged, ready and willing but they need to translate this into action – and to do that they need someone to help them understand what further steps they should take such as to switch to EVs, insulate their homes and think about replacing their gas boilers.

> *"I think climate change is a pressing issue for the world. I don't think there's enough information about what we can do to make a difference."*

Because this segment have such high home-ownership levels and because they are relatively affluent, persuading this group to participate also offers the potential of high returns.

Price Sensitive

Price Sensitive

"I wouldn't mind having an electric car, but it's not economical for me to go out and buy one. It would be too much just to justify like the difference for the environment, if that makes sense."

- Focus group participant

The Price Sensitive segment represents 19% of the population. They are one of the least likely groups to own their own home and although they are keen to engage with climate change, they cannot or will not do so unless they can afford it.

This group's focus was on waste and pollution rather than carbon dioxide emissions when they talk about climate change. When asked what effects of climate change they are most worried about, this group cites the impact on wildlife and habitat (51% as opposed to 41% which was the highest score) and their concerns about the planet on which their children and grandchildren will have to live (47% in contrast with 36% of the total).

The Price Sensitive are engaged with current affairs generally. While they were concerned about climate change, in the focus groups food supply chains and a possible Covid winter wave were their main concerns chiefly because some of them were in professions like hairdressing and nursing that will be impacted.

Concern

While climate change was a concern, affordability was the primary driver for this group. In focus groups this segment was far more concerned about the rise in National Insurance Contributions and how they would get through Christmas than other groups. This did not mean that they were not concerned about climate change. On the contrary, they listed climate change high on their list of concerns. Where the total sample listed climate change third-equal to the economy on 31%, this group selected it as the second issue (39%). It was just that they did not know what they could do about it given their financial constraints.

> *"What I'm most worried about is inflation, prices going up, the cost of living, the cut in Universal Credit. Then you've got a rise in National Insurance – electricity prices, they're going up too. If there's another lockdown on top of that, to be honest, I don't know what I'd do."*

Awareness

This group, although highly price-sensitive, was aware of what was happening in the news and engaged with climate change at a practical level. For example, their awareness of the ban on petrol and diesel cars was relatively low when compared to the average (76% as opposed to 82%) and 61% said that they had heard of net zero plans (compared to 72%).

However, they were very tech and social media savvy. Three members of the Bolton/Bury focus group had climate-friendly apps which allowed them to help fight climate change without paying anything extra in the process. Although it shows that this group will engage and act (when it costs them nothing), it will be important that their actions are meaningful – not just that they have ticked a box that satisfies them but makes no real impact.

> *"What I've noticed is everyone recycling now. You're not seeing so much waste as you used to."*

> *"I've got an app, Too Good To Go, to reduce waste. I tell everyone to use that."*

> *"I've got an app, Treeapp. I've planted 53 trees in Madagascar. Not actually myself but through this app. It doesn't cost me anything, but it means I'm reducing my carbon emissions by planting trees and I feel much better. I've got a diesel car but with my app I feel much better that I'm carbon negative at the end of the month."*

Definition

In polling the climate concerns of this segment focussed on wildlife and tangible, human impacts of climate change. In comparison the focus groups were more mixed with some people who had heard of net zero and could explain what it meant.

> *"Even in my lifetime, there's been a loss of animals. Eight or nine species have become extinct in the last 18 months – and humans are to blame for it."*

In the focus groups, most participants felt that they were seeing climate change with their own eyes and it was something that was affecting them directly in a tangible way.

> *"I've seen big changes in the climate. It used to take thousands of years and now it's happening in people's lifetimes. I'm a keen gardener and I've noticed the difference."*

> *"I think it's the world's way of saying that it's not happy. I think it's a wake-up call."*

Trust

This group was mixed when it came to who to trust. They were not cynical but instead jaded about Government advice, for example citing changing guidance on diesel cars. This, as well as cost, was given as a reason why they would not buy an electric vehicle now. For this group, trust was linked inextricably with cost and the possibility that decisions might hit them in the pocket later on.

> *"I wouldn't necessarily trust that what they're telling me is the best thing, it almost feels like we're the ones all the time that sort of lose out and are out of pocket."*

Cost and convenience

Cost, as the name suggests, was the driving force behind every decision taken by this group – much more so than convenience. The Price Sensitives were far more likely to have turned down their heating (73% as opposed to 60% of the total sample) and to have reduced car use slightly more (46% as opposed to 40% of the total). Only 11% (the lowest score) had upgraded roof insulation – so they were doing what saved them money but not anything that required up-front costs.

Although motivated by price, they had a high willingness to be inconvenienced – but only so long as it did not cost anything. Ninety-seven percent would make changes if they were cheaper (78% of the total sample would). In the focus groups it was very clear that this was because these groups had tight incomes and were concerned about financial hardship ahead, so this appears to be not an *unwillingness* to pay so much as an *inability* to pay.

> *"I think this is how society is. There's a lot of guilt put on us that we're not doing enough and maybe not buying enough of the eco-friendly products. So should that not be pushed back, like the companies making them, make them cheap? It's almost like organic vegetables are more expensive than vegetables. So if you've got a family, I've got a family of six, I have to budget."*

> *"I looked into solar when we had a new boiler but it was too expensive. We've changed everything to an app, though. We've changed the lightbulbs which work on an app."*

> *"The house we live in is only two years old so it's all brand new. Our gas is flo-gas which is like liquid. It has run out a few times but it's so economical and cheap to run. It's cut my bills from £300 a quarter to £80."*

Responsibility and action

This group did feel that individuals should take responsibility for their actions on climate change and 61% thought that their actions could make a difference to reduce the impact of climate change (58% total sample). As with the other groups, they believed that leadership should come from the top, from Government and from big business, and that everyone had to play a part.

> *"Start at the top. Like the bigger companies, I think their impact would be a lot greater than ours. I heard this stat that if one person was to recycle their whole life, like if they did, or they didn't, they would make no effect whatsoever. It's only when the entire country was to do it. That's when it makes the big difference."*

But the Price Sensitives still felt that the UK should be a first mover when it comes to combatting climate change. Eighty percent thought that the UK should do what it can to combat climate change even if other countries do not (total 61%).

In the focus groups (although less so in the polling) this group was quite assertive in the steps they wanted national Government to take, wanting them to educate people on climate change and explain the steps that we need to take. Again, what they wanted to know was at a very practical level.

> *"I think they could let you know what they're doing with the recycling – and where it all goes, what happens to the recycling. I'd really like to know that."*

> *"We had the G7 in Cornwall and climate change was discussed but it never came back to us. We never found out what they talked about. Why don't we get told?"*

It was also clear that the commitment that this group was prepared to make to action was bounded by cost. [See 'Cost and Convenience', above]. This same dynamic plays out in their predicted behaviour over the next five years. For example, 57% said they were likely to switch to an energy tariff that is cheaper at certain times of day (versus 52% national average) but only 20% thought they would upgrade their wall insulation (versus 24%).

Reaction to falling carbon emissions

This group was entirely positive about the impact of hearing how dramatically the UK had reduced its carbon emissions over the last decade. They believed that more carrot than stick should be used to help people make positive change and thought that such good news would encourage others to do a bit more.

> *You've got to be encouraged by that. That's quite a fantastic figure. Maybe every little thing we're doing does help.*
>
> *We're always told Do more! Do more! It's not enough! This is a much better way of doing it.*

Recommended engagement

A high target group that will be the first-movers if the price is right. *As with Climate Worriers and Busy Convenience-seekers, the Price Sensitive group score highly on the statement 'I find it difficult to keep up with all the environmental changes I am told to make' with net 62% agreement (compared to 37% of all Britons) suggesting that clear, concise education may be an issue here. But beyond that, this is a willing and engaged group that wants to make changes to their lives and are conscious of the impact that they can make as individuals. Find a way to make it affordable, and this group will be first-movers. A good way to engage them is by explaining what measures are already being taken and what the impact of that has been.*

As a group that focuses more on waste and pollution, this would be the entry point for engaging this group – but engagement is not going to be a problem. The real issue is how they can be financially supported to make meaningful changes such as switching to EVs, buying heat pumps and insulating their homes. More than likely this will mean Government grants and financial support, for example, to make options 'budgetable'. This group is more cost-constrained than, the Busy Convenience-seekers but they would still benefit from financing options that offset the upfront costs of capital investment costs in items such as solar panels, insulation and heating. If savings are available this group will be far more likely to make meaningful change.

Actively Engaged

Actively Engaged

"I'm probably doing as much as I can because there are certain things you'd have to sacrifice. I walk to the supermarket but that's mainly because it's beneficial to my health."

- Focus group participant

This group makes up 19% of the population. The Actively Engaged are aware of current affairs issues generally. They understand and speak confidently about climate change on a global level rather than focusing only on waste and pollution. They are more than happy to tell others what they ought to be doing. They are not the oldest group but they are at the older end of the spectrum. They are among the highest educated of the segments (51% with a degree or above versus 41% in total) and like the Climate Worriers, they feature a slightly higher proportion of the highest socio-economic group (29% versus 27% in total).

The Actively Engaged voted 55% to Remain in the EU at the referendum with 31% voting Leave, and this segment leans slightly towards the left – with 29% saying they will vote Labour and 24% choosing the Conservatives.

Concern and awareness

This group consistently scored the highest for caring about the planet, and selected climate change as the most important issue by far in their list of concerns (at 56% as opposed to 31% on average). When asked what aspects of climate change they were most concerned about, wildlife scored highly (55% in contrast with 41% of the total population) and the impact that it would have on future generations (47% versus 36% total). This group scored highly in awareness of the ban on the sale of petrol and diesel cars (88%) and 83% said that they had heard of the net zero plan compared to 72% of the population as a whole.

As we will see below, this is a relatively affluent group who were not as concerned with a rise in living costs (scoring lowest at 11% citing this as a worry stemming from climate change versus 21% in total). They were concerned about climate change and highly engaged – one woman in our focus groups had started her own sustainable fashion business during the pandemic, as much motivated by making money as helping the environment.

As with the Climate Worrier group, the Actively Engaged thought that it might already be too late to do anything about climate change and that the impacts would be devastating, but this did not mean that they were not prepared to do anything about it.

> *"We're not going to reverse it now. When I was watching Good Morning Britain, the weather girl was in the North Pole or South Pole, whichever one it was, and she showed the ice caps that were melting."*

> *"It's a great idea to have a goal. I don't know the specifics about 2050 but I think it's a good idea. I'm sure it [climate change] is going to happen."*

Definition

Because of their high levels of awareness, this group drew clear distinctions between the environment (waste and recycling) and climate change, which was about greenhouse gas emissions causing extreme weather events.

> *"The temperature of Earth is rising and that's causing flooding and melting ice caps and it's already having a huge impact on people's lives."*

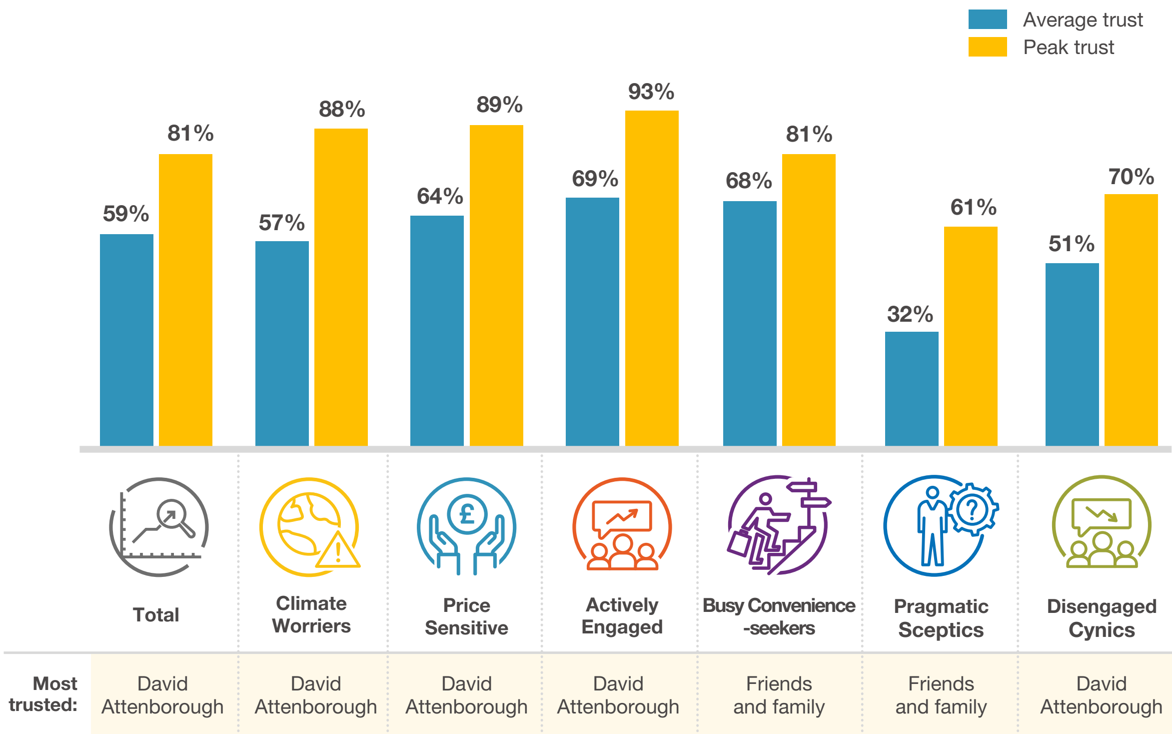
> *"What worries me most is how people talk about it. Either it's climate change denial or how it's not such a big problem. It's all got this kind of political agenda around it which ultimately slows down the process."*

Trust

In our poll, the public were asked which sources of information they would trust if looking for advice about how to make changes to their life to become 'greener'. The Actively Engaged gave the highest average score across all categories – 69% compared to a national average of 59% – demonstrating higher baseline trust. They were also the segment with the highest trust levels for a range of sources: David Attenborough, documentaries, news, environmental charities, utility companies, Martin Lewis, their council and Greta Thunberg.

Chart 6: Variation in trust across segments

If you were looking for advice on how to make changes to your life to become 'greener', to what extent would you trust or not trust the different sources of information below?



However, in the focus groups, it became clear that they still had strong reservations about trusting the motivations of Government and big business. And in a few categories of the polling, the Actively Engaged were eclipsed by the trust levels of the Busy Convenience-seekers, who were far more disposed to trusting social media, YouTube and their own plumber or builder, and a little more trusting of newspapers, radio and the national government.

> *"If you set a deadline far enough in the future, no-one will be there when they don't hit it… Government can hide behind those targets because they know they won't be here when we get there."*

> *"I don't think I trust anyone these days. It's got to be somebody who isn't going to make a profit out of it."*

Cost and convenience

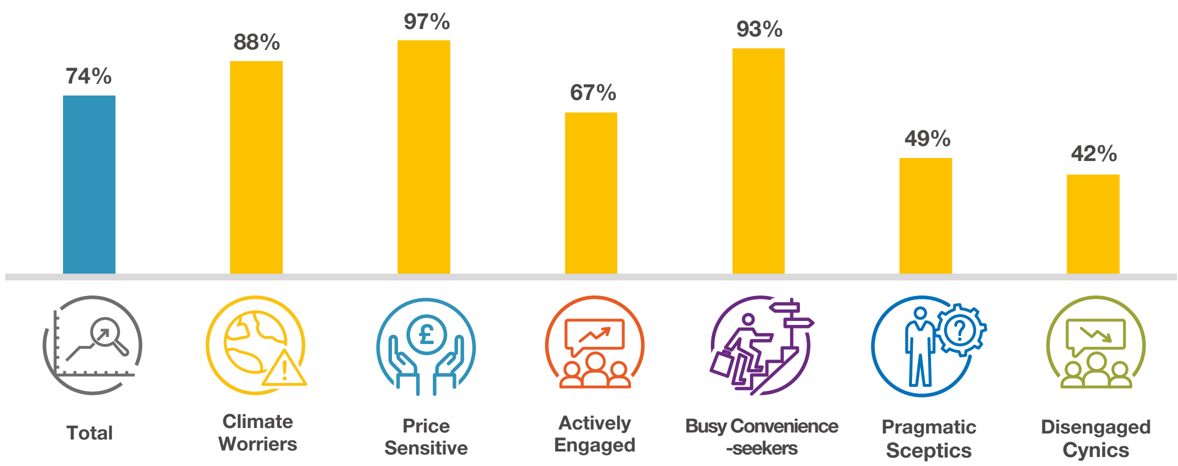
This was one of the very few groups for whom cost and convenience were not primary drivers. For example, 37% would make more energy-saving changes if they were less disruptive compared to 57% of the whole population.

> *"I've always really enjoyed holidays about two or three times a year and with the pandemic I've not missed it as much as I thought I would."*

There was no sense that they could not afford to make changes if they wanted to. Where a net total of 74% of all Britons said that they would make climate-friendly changes if they were cheaper, this group had a net score of 67% suggesting that money is far less of an issue.

Chart 7: "I would make more of these types of changes if they were cheaper"

The changes in the previous question are some of the options suggested to help us fight climate change. To what extent do you agree or disagree with each of the following statements?: I would make more of these types of changes if they were cheaper [% agree or strongly agree]



Where most of the other groups would talked about owning an electric vehicle as an impossible dream, this did not seem so out of reach for the Actively Engaged.

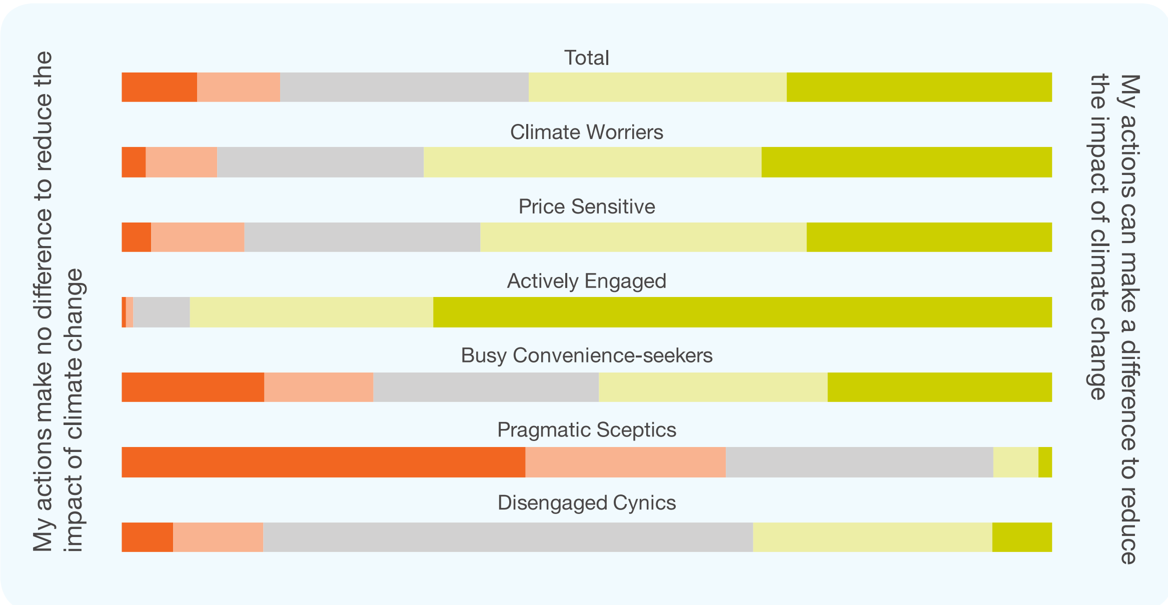
> *"The generation that I'm growing up in… is becoming more environmentally conscious – and people like Tesla because they make climate change interesting."*

However in the focus groups, there was a distinct sense that convenience did matter and that when it came to it, this group would take the easy option. This discrepancy is something to keep an eye on so that we can discern whether their answers in the polling are wishful thinking or whether actually making small sacrifices for climate change is not as easy as it seems.

> *"Never enough hours in the day when you've got a family and a job to do. It's a great idea to go and walk to the shops, to make those changes and go on a bike, sometimes, that sort of thing. But you've got to give yourself that much more extra time to do those things."*

Responsibility and action

Chart 8: Which statement comes closest to your view?
Which statement comes closest to your view?



This group had the highest score by far (95%) for believing that the UK should do what it can to combat climate change even if other countries do not (total 61%). They also had the highest score (93%) for believing that their actions can make a difference to reduce the impact of climate change (58% total sample).

This segment also scored the highest on almost every measure taken to reduce energy use in the past five years: 76% versus 58% average for turning down their heating to use less energy, 60% had reduced car use (as opposed to an average of 40%) and 62% said they had purchased goods which were more environmentally friendly even if it meant paying more (in contrast to 32% overall). They were also more likely to think that they already do their bit with a net score of 84% feeling this way. Across the whole population the score was 64%.

A challenge with this group was that they already thought they were doing everything they could already and that there was little more they could do. It was down to other people, national and local government, to make more changes.

> *"I think they [local authorities] do have a role – educating people about the impact it's having, and I think organising community events. They could do that."*

> *"There should be much more community campaign and younger people involved."*

> *"Government are supposed to represent us… That is why we voted for them."*

Reaction to falling carbon emissions

There was a mixed reaction in these focus groups to the reductions in carbon emissions with some thinking that this would motivate people to do more while others were concerned about complacency. Still others thought that the reductions were directly attributable to the lockdowns during the Covid pandemic.

> *"If you've got the mindset that things will happen anyway, then people won't do anything."*

> *"I think that should be put on the news. I didn't know it was that much. It would really encourage people to make change."*

> *"It would be interesting to know if it was individuals or big businesses [responsible for the dramatic drop in carbon emissions], because if it's businesses then I'm just not so sure. They do all this – what do they call it? – offsets. If it's one of those things on paper that looks good but in reality it's not..."*

Recommendations for engagement

This is a medium-high target group *because it is already engaged and has, in many ways, already made lifestyle shifts. The problem is that this group feels that it is already doing what it can and cannot do more. The issue here is not cost – price is not as much of an issue for the Actively Engaged. The best approach for this group is to persuade it to take on a leadership role in engaging others and explaining to them the actions that need to be taken. They know a lot about climate change and in the focus groups it was clear that they liked to tell people all about it.*

Busy Convenience-seekers

Busy Convenience-seekers

"If I didn't work [then I could change my lifestyle more]. Me and my husband both work full time. Even just changing to a new gas supplier gets left because you're tired when you get home, or you bring work home. You don't have time. We're both busy with the children. It's about making it easier to change."

\- Focus group participant

Making up 15% of the population, this group is less engaged in current affairs, including climate change. They are the most likely group to have children living at home (55% have in contrast with 30% in total) and are the youngest segment – 57% are between 18 and 34, compared to 31% of the rest of the sample is. Along with the Actively Engaged, they have the highest educational attainment levels (51% have a degree or higher qualifications in contrast with 41% of the total) and are far more likely than any other segment to live in a city.

The fact that they are young and have children probably explains why they are less engaged – but this lack of engagement on climate change does not mean that they do not care. Instead they lack the time, money or inclination to do much about it.

Concern

Although Busy Convenience-seekers mentioned climate change as a concern, this group had other, more pressing issues to worry about. Climate change felt like a very long way off and a concern for other people more than themselves. They did worry about the changing weather, the threat to wildlife and the loss of distinct seasons (17% worried about this as opposed to 10% of the whole sample). They also scored above average on concerns about the rise in cost of living and food production, suggesting that their concerns were much more immediate and practical than some of the other groups.

> *"It's not going to affect me. It'll be my children and my children's children. It'll be years down the line. Covid is the number one, the immediate danger, and then global warming is the next immediate one."*

Awareness

This group had a medium-level general awareness which was likely due to the fact they were too busy with their everyday lives to pay much attention. They have heard of climate change and talked about extreme weather events that they had seen in the news, but the reaction to that awareness was very low-level and certainly did nothing to mobilise this group into taking more drastic action. Although this group's awareness of net zero was low, they did understand and support it when it was explained.

> *"I'm sometimes a bit ignorant with the news because I get frustrated listening to the news. A lot of the time, I don't always pick up on the major things."*

> *"For me, in terms of tuning into the news to take more on board, it's not something I've necessarily had headspace for. So as soon as you explained what sort of net zero was, I knew exactly what you're on about, but I just hadn't made the connection."*

Definition

When it comes to what this group understands by 'climate change', it was firmly in the tangible camp. Climate change was the weather you can see and the problems were caused by too much waste, especially plastic. For this group, cutting down on plastics and litter was seen as a priority when it came to shifting personal behaviours – rather than energy-saving activity, for example.

> *"I don't know if global warming means we're all going to die tomorrow, but there's definitely a problem in terms of trash in the ocean – how we consume our food, how we consume single-use plastics and the sustainability of it all. Those will lead to climate problems down the line if they're not fixed."*

> *"I must say, in winter, the rainstorms have got a lot worse. I wouldn't go on the prom when it's raining because I feel like I'll probably get pushed over because it's that heavy."*

Trust

This segment did not trust big business or the media. However they did trust the Government to a certain extent as a reliable source of information – just about. 66% trusted their local council (62% did overall) and 67% trusted national Government (59% did in total). This was also reflected in the focus groups.

> *"It'd probably have to be the Government. If you hear information from a gas or energy supplier, you think they're out to make money from themselves."*

> *"It needs to come through the chain of authority. Like, it should start at the centre and come through that chain, that line of service."*

In fact, when asked which sources of information they would trust if looking for advice about how to make changes to their life to become 'greener', Busy Convenience-seekers were the second most trusting group on average (after the Actively Engaged). Their three most trusted sources were friends and family, David Attenborough and documentaries but they were also far more disposed to trusting social media, YouTube and their own plumber or builder, and a little more trusting of newspapers, radio and the national government than other segments

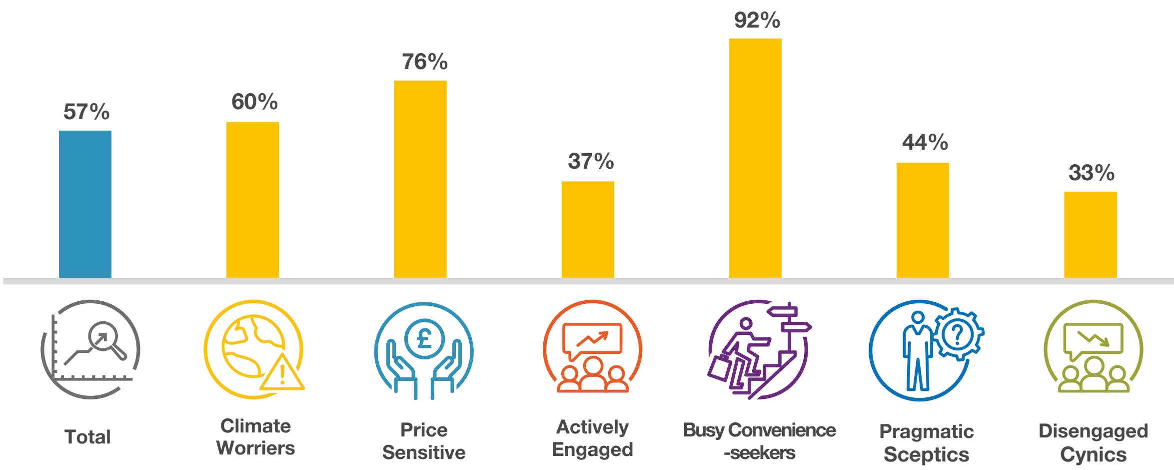
Cost and convenience

Cost and convenience were major drivers for this segment. Ninety-four percent would make changes if these were cheaper (78% of the total sample would) and 92% would make changes if they were less disruptive (total sample was 57%). Disruption for this group was not about major renovation works or lifestyle change, it was day-to-day habits such as changing how they commuted or even the process of thinking about greener alternatives to heating or cars. These were inconvenient and created a barrier to action.

> *"I think most people could probably do more but it's trying to tailor your lifestyle to that because it's not feasible to expect everyone to jump on a bus every single day. I only work a mile and a half down the roads but even so at 7am I don't want to be getting out of bed an hour earlier."*

Chart 9: "I would make most of these types of changes if they were less disruptive"

The changes in the previous question are some of the options suggested to help us fight climate change. To what extent do you agree or disagree with each of the following statements?: I would make more of these types of changes if they were less disruptive. [% agree or strongly agree].



This segment did not care so deeply about climate change because they felt it was so remote, so any changes they were expected to make not only had to be convenient but also affordable – or at least cost-effective in the longer term. For example, this group, by far more than the others, had insulated their roof (26% versus 16% in total) and walls (24% versus 13% in total). Swaying this group with longer-term savings meant providing and communicating 'budgetability' – a reduction in fixed upfront costs through a focus on clever financing that shared the operational savings to offset higher capital investments. Such arrangements also needed to be managed by a trustworthy source so that consumers believed that their savings would survive changes of policy or circumstance.

As an example, when this segment discussed solar panels, some were keen to install them if possible but believed that the upfront costs were too high to justify. They were also worried about the amount of time it would take to recoup that money – what if they wanted to move house before they got their money's worth? Providing simple, trustworthy, *convenient* financing will be key.

> *"I think if they expect us to do certain things about the environment, they should put funds in place to support people."*

"Some people can't afford some of the charges. People are concerned about how they get to work or how they pay their bills. I know it's caused problems. I hear it through my work that some people do struggle, because they can't afford to pay the congestion charge to get into the city. But equally they can't afford the transport passes put in place. So it's Catch 22."

Responsibility and action

This group felt that global multilateral action was necessary before the UK should act on climate change. Forty percent thought that the UK should do what it can to combat climate change even if other countries do not (versus a national average of 61%) and that everyone should take responsibility for climate change, including other Governments and big corporations. They were less likely than average to think that their actions could make a difference to reduce the impact of climate change (49% in contrast to 58% of the whole sample).

"Like Boris Johnson going to a G7 meeting about climate change and arriving on a private jet. That didn't need to happen."

"We're a tiny country. We can do what we can. But then you have Chinese factories that just grow and grow and grow."

This led to lower than average scores for taking actions to reduce their energy usage that would mean disruption or change to their own lives. For example, 58% of Britons say they have turned down their heating to use less energy, compared to 51% of Busy Convenience-seekers. Similarly, 34% had reduced their car use in favour of walking, cycling or public transport, compared to 40% on average. In focus groups, this kind of habit change was perceived as far more 'disruptive' and contentious than significant building works.

Reaction to falling carbon emissions

This segment were slightly more likely than average to think that carbon emissions had probably gone up quite a lot over the last ten years (75% versus 71%) and were delighted to hear that they had reduced. This was a real motivator for this group, seeing that change was possible already, although there was a caveat or concern that if others heard that emissions had dropped without having done anything to contribute to the reduction then this might lead to complacency.

"I'm really pleased about that. I assumed it's come down because we're so much more aware, and there's been massive changes in just the last three or four years. But my concern is that, if you publicise it to people, will they then stop bothering."

"I think that's fabulous news that I would never have expected, and I think it's very under-published."

Recommended engagement

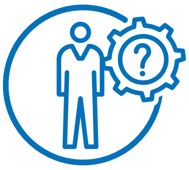
This is a medium target group *as it will be difficult to engage them, for now. The fact that so many of them still have children living at home and are least likely to be retired suggests they are leading* *busy lives where cost and convenience are at a premium. All the same, very high numbers of them say they would make changes if they were cheaper and less disruptive and scored around the average for thinking that climate change was the most pressing or one of the most pressing issues facing us today.*

This segment was the most likely of all to agree with the statement 'I find it difficult to keep up with all the environmental changes I am told to make' with 83% agreeing either strongly or somewhat, compared to 53% of Britons as a whole. This highlights education is also an issue, but must be carried out in a way which does not waste this segments time.

This group did not feel that they could make an impact unless other larger countries did their bit, so they need to be convinced why and how their own actions can make a difference. This will be a tough group to engage and persuade, but cost and convenience are the entry points here, with clear financing options that offer low upfront costs an opportunity. They were also motivated by seeing others take action.

Pragmatic Sceptics

Pragmatic Sceptics



"There's so many things that you try to do that have no effect and then in the background, they're doing things that are destroying things on a bigger scale. I don't so much think it's the normal working people causing these problems. It's the big corporations and the big people."

- Focus group participant

This group represents 8% of the population. They are far less worried about climate change and are therefore not willing to do much about it. They are more likely than average to be retired (26% versus 17% of the whole sample) and older (49% are 55 or over, 35% of the total sample is) and have relatively low educational attainment levels (31% are graduates or above while 41% of the total are). On almost every issue this group sees the cloud rather than the silver lining.

This group is heavily Leave voting (67% voted Leave in the 2016 referendum as opposed to 20% who voted Remain) and also far more likely to vote Conservative at the next General Election (43% saying they would vote Conservative if there were an election tomorrow over 9% who said they would vote Labour). They are also at the high end of owning their own homes outright: 45% do while 20% own with a mortgage.

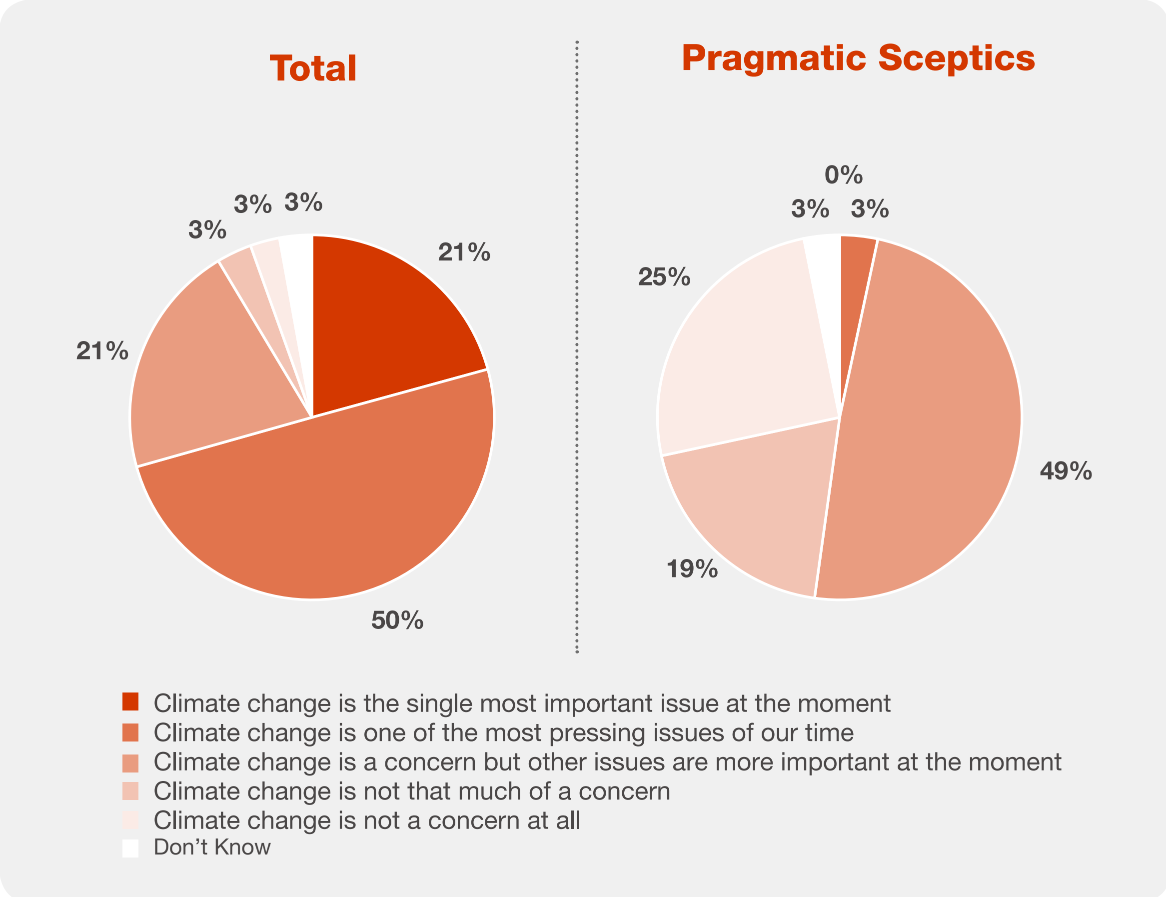
Concern

Thirty-five per cent of this group said they were *not* worried about the effects of climate change (as opposed to 5% of all Britons). The only thing they seemed slightly concerned with was the impact of increased costs to deal with climate change (28% versus 21%) and perhaps impacts on wildlife – although at a far lower incidence than the rest of the population – 20% versus 41%.

> *"It's going to affect everyone, of course. But not in the immediate time. I'm thinking around 20-30 years, 40 years or something. But now, I'm not bothered, honestly. I know that something will happen. If I'm still alive, I should care."*

In our polling, the Pragmatic Sceptics ranked climate very low in comparison with all other concerns and massively prioritised immigration (44% as opposed to 18% of the total sample) and, to a certain extent crime, as issues that worried them. When asked how serious they considered the issue of climate change to be, no-one selected it as the single most important issue (as opposed to 21% of the total) and only 3% thought it was *one* of the most pressing issues (as opposed to 50% of the total). Forty-nine percent instead thought that it was a concern but that other issues were more important at the moment.

Chart 10: Which statement comes closest to your view?
How serious do you consider the issue of climate change to be?



This scepticism around climate change in the polling was not reflected in the focus groups where people thought climate change was happening but the full impact of it was considered to be very far off and would probably not affect them personally. Some people voiced concerns about children and grandchildren but this did not come out in our polling. Unless it was going to impact them directly then it was not such a worry for them.

> *"I'm not low enough to sea level so I'm not overly concerned about flooding and things like that. But on the coast, you can end up losing houses and cliff erosion like we've seen on the news recently."*

> *"We have a lot of things going on in our private life, day by day. So personally, I don't have too much time to think about climate change."*

Awareness and definitions

If Pragmatic Sceptics thought about climate change at all, it was in tangible and environmental ways. When talking about climate change, they spoke about reducing waste and recycling more. For them, carbon emissions were about air pollution. They felt they were doing what they could within those very confined parameters and discussed actions such as eating less meat, walking sometimes instead of taking the car or buying loose fruit and vegetables. Energy conservation was a remote part of this conversation if it entered at all.

“Many boxes of cereal get opened each week in this country – the world? Why has it got to be plastic instead of paper inside those boxes? That one little change would make a big difference.”

“If I can buy loose fruit and not put it in a plastic bag, then I’ll just put it in my ordinary bag and not bother with the plastics as much as I can.”

Trust

This segment expressed very low trust in anyone other than independent, unbiased experts (although agreeing who those are is a different matter). The people they most trusted were friends, family and other members of the public, people like themselves. Trust, or the lack of it, defined this group above all else.

“They’ve all got their spin on whatever. Whichever government, whichever party is in government, they’ve all got a twist on it. I think it needs to be somebody independent, giving you that information.”

When it comes to Governments, other countries, big businesses and most of the media, there was a high degree of cynicism that they were motivated by anything other than benefit and profit for themselves. This finding was also reflected in the polling where Pragmatic Sceptics had the lowest average trust score by a considerable margin: 32% compared to an average of 59%. The most trusted sources for this segment also varied notably compared to others: they trusted their friends and family above all else (only Busy Convenience-seekers say the same), followed by David Attenborough and then by Martin Lewis. They were the only segment for whom Martin Lewis made it to the top three most trusted sources on living a ‘greener’ life. We also saw how profoundly trust was linked to control and cost for this group. They did not trust people to be honest about the price of going green which was why they were going to wait to see for themselves what it cost others.

They were very nervous about handing personal data and control over their lives to private business, so when it comes to sharing information with big corporate utility companies, some respondents were happier for those utility companies to be publicly owned.

“We should all have solar panels. We should all be generating some of our electric. But again, at the moment it’s not run properly. You don’t know who you can trust. Say you get someone to do it for you and then you find out they haven’t done a good job or it’s not working the way they said. So, until it’s sort of standardised and in the mainstream, I think people won’t go for it.”

“I don’t like the idea of [a private electricity company] just being able to one day turn around and say that, just like with the water where they say ‘don’t water your garden today’ but you go to a car wash and they’re still washing cars. So electric cars is not really something that I want to go down because I don’t want to give them more control.”

Cost and convenience

Sixty-two percent said they would make changes if these were cheaper (78% of the total sample would) and 44% would make changes if they were less disruptive (total sample was 57%) demonstrating that cost and convenience are less important barriers for this segment than others. If it were not for the prohibitive cost, Pragmatic Sceptics group would love an electric vehicle and to shop at their local butchers. It was something they aspired to but just could not afford – and these were not things they would do to help prevent climate change but rather because they were aspirational.

> *"I'm on a tight budget because I'm on my own. As much as I'd like to buy local fresh produce from butchers and greengrocers, my budget really doesn't allow that otherwise I definitely would."*

> *"With electric cars, they're far too expensive. And most of us can't afford it. Most of us would be happy to change, but we can't afford it."*

Responsibility and action

Only 7% thought that their actions could make a difference to reduce the impact of climate change (compared to 58% of the total sample) and this had a direct impact on their willingness to change their day-to-day life or engage in energy-saving activities.

Another defining feature of this group was that they felt there was little point in making an effort on an individual basis when countries like China and the US were not doing anything and while large corporations were not made to tackle their waste and plastic use. Only 10% (the lowest) thought that the UK should do what it can to combat climate change even if other countries do not (total 61%).

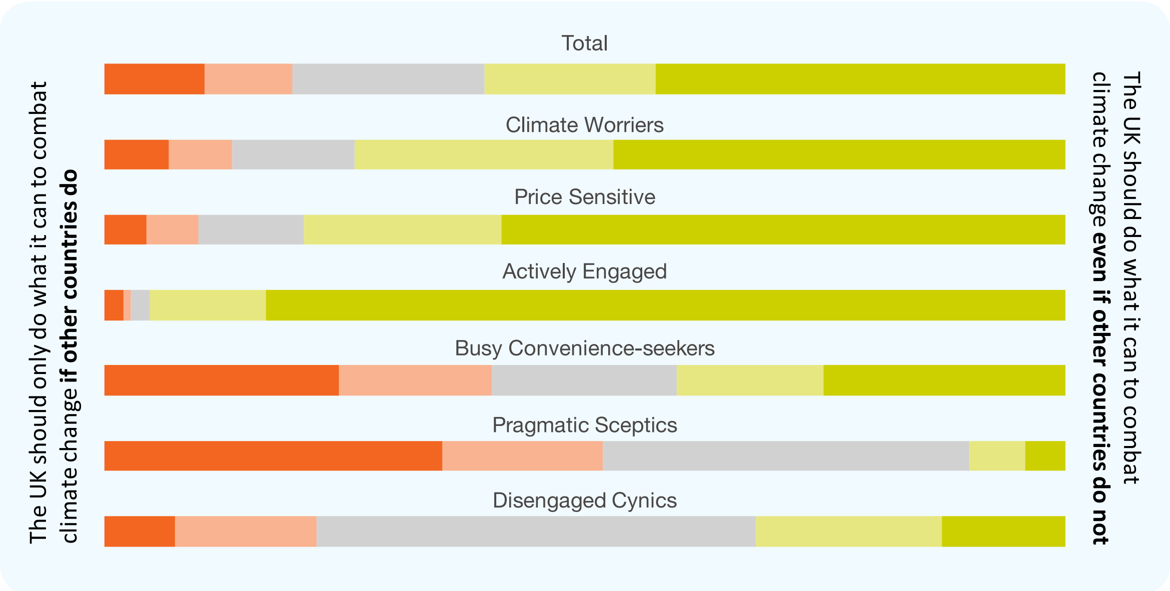
> *"I do think we should do something, and I'm wholeheartedly behind it. But the bigger countries like China and America, who actually produce far more than we do, don't seem to be on board as much."*

When presented with a list of climate-friendly actions that they might have taken in the past 5 years, ranging from turning down the heating, reducing car use and upgrading wall and loft insulation, this group overwhelmingly selected 'None of the above' at 51%, in contrast with the total population of whom only 17% selected none. When asked whose responsibility it is to tackle climate change, this group was least likely to select 'individuals' (5% as opposed to 20% of the total).

> *"Government expect us to sort it, whereas they should be solving it and telling us what to do – and the electric and gas companies."*

Chart 11: Which statement comes closest to your view?

Which statement comes closest to your view?



These are pragmatists, and this was reflected in their focus group discussions. The fact that new-build homes were still not being built with solar panels was something that baffled them, but it also has the effect of making them feel that if the Government couldn't get the big things right, then it was not their responsibility to compensate with the small things.

> *"I actually don't understand. They're building all new houses, especially around where I live. There's a lot of new properties being built, but they're not actually building them with solar panels in them."*

Reaction to falling carbon emissions

While some groups found the news that carbon emissions had been reduced over the last decade made them feel more motivated to do more themselves, for this segment, the reaction was far more muted and, back to their issues with trust, they were unsure whether or not to believe it. They were also concerned what the reduction really meant for global emissions.

> *"That makes me happy but not overly. I'm not jumping for joy, but it's good. It's good that it's going in that way."*

Recommended engagement

Our recommendation would be not to concentrate efforts on this group for now. *They have taken a decision that climate change is not an issue, whether that is because they think it is not happening, that its impact on them will be minimal, or that they can do little to change anything, so any engagement is likely to be counterproductive. A lack of social proof and reciprocity is also a major barrier to action for this segment, so showing that other segments (and nations) are making changes will be more effective than direct engagement.*

Disengaged Cynics

Disengaged Cynics

"I only really get the local paper if I go out and I'm on the bus. A lot of what I see is on Facebook, or what comes up if I swipe my phone and it brings up certain articles. If it doesn't come up on there, I won't have seen it."

- Focus group participant

This group makes up 20% of the population. They are disengaged on almost everything and that includes climate change. This makes them significantly more likely to choose 'don't know' or 'neutral' answers on polls. This group was slightly more likely than average to have children living at home (35% versus 30% average) and were less likely to be retired (12% versus 17% in total). They had the highest representation in the DE socio-economic group (30% versus 25% in total) and had the lowest levels of home ownership (55% versus 62% in total). [See appendix A for information on socio-economic groupings]

Concern

When asked to select the most important issues facing the country, this group was more likely than any other to say they did not know (7% versus 2%). Compared to other Britons, their top three issues were very similar: Covid, the NHS and the economy, but climate change slipped into sixth place behind mental health, immigration and crime – scoring only 15% against an average of 31%. Global warming, the environment and climate change were all listed as major issues facing the country during our focus groups but perhaps not the greatest worry. Covid and lorry shortages, the prospect of empty shelves and a possible lockdown were all much more imminent problems.

> *"Biggest issues? Apart from global warming and all that, which just lingers on in the background. That's almost been pushed to the back because we've got a pandemic we've been dealing with."*

> *"I think I'm guilty of not putting as much thought into it, because there are other things that I'm thinking about more."*

Awareness and definitions

When polling this group, we found their awareness of the ban on petrol and diesel cars was comparatively low (68% in contrast to 82% overall who said that they were aware) and only 49% said that they had heard of net zero (as opposed to 72% of the total sample).

Part of this stems from the fact that this was a very low awareness group that did not consume very much news and got much of its information from Facebook groups and maybe local news. It is an indication of how far climate awareness has come that this segment were clearly aware of climate change and some of the measures they were expected to take to mitigate it.

"For me it's about animals. Polar bears. Grizzly bears, if they have to hibernate as well. The oceans. For me that's massive. Plastics being in there. It's ruining the sea and it's awful. Our nature is disappearing."

"Less driving and walking more because obviously because of the pollution everything obviously when you used to go when you go for runs and that you'd notice it obviously your chest would hurt because of all the pollution."

Trust, cost and convenience

Awareness of climate change was not enough to drive behaviour change, though. Cost was a strong feature of this group with 48% saying that they would make changes if these were cheaper (78% of all Britons would) and 33% saying they would make changes if they were less disruptive (compared to 57% average). It was clear the focus groups that Disengaged Cynics had been looking into green technology such as electric vehicles but the prices were off-putting.

"We wanted an SUV-type because I have football stuff constantly in the boot. And it was cheaper to buy a big BMW diesel. It was going to be £200-a-month more an electric or hybrid Kia so it just wasn't even a contest."

Responsibility and action

Apart from the Pragmatic Sceptics, this group was least likely to say that their actions could make an impact on reducing climate change (32% versus 58% in total) and only 32% thought that the UK should do what it can to combat climate change even if other countries do not (average: 61%).

"You've got countries like China that are going to emit so much more than us anyway, so me turning my kettle off or turning my heating to thirty degrees, it's not going to make much difference."

This lack of belief in their own impact translated into a lack of action. Disengaged Cynics were far less likely than average to have taken any of the energy-saving actions we tested – only the Pragmatic Sceptics scored lower. Thirty percent of this segment had taken no action at all, compared to a national average of 17%.

On the question of who should be primarily responsible for tackling climate change in the focus groups, there was a broad spectrum – basically everyone had responsibility according to this group, though maybe not themselves.

"They [local councils] could have a role getting the information from central Government and feeding it out to different communities – different ways and different methods that suits their different communities. It might have a bit more impact if it was personalised than if it was coming from Westminster."

"I don't think councils should be doing a lot [on climate change]. Our lampposts were recently changed to have panels – that's good. But the roads are awful, the potholes and that. They've got other things to do."

Reaction to falling carbon emissions

As with other groups, most people did not know the answer to the question of whether carbon emissions had reduced, risen or remained the same in the UK in the past decade. The response to the fact that they had dropped was not as enthusiastically received as in other groups, but this may be as a result of the group not being as engaged as others were.

> *"It does make you want to do a little bit more, but like we touched on earlier, it's like, one person does nothing, so to speak. So, you feel like whatever you're putting in, because 10 other people aren't doing anything it won't make an impact."*

Recommended engagement

This is a medium-low target group, *as some of them will naturally move into the other segments as awareness of climate change increases generally across society. Others will remain hard to engage (partly like the Busy Convenience-Seekers) because they are busy and have more immediate priorities. In focus groups, this group resembled the Price Sensitive group in that they were aware of measures they ought to take but could not afford or were unwilling to take those extra steps. Tackling climate change for this group is about reducing waste and recycling a bit more, rather than about carbon emissions, so as well as making environmentally-friendly options cheaper and more convenient, there needs to be some education targeted at this group about what climate change means.*

Conclusions & Recommendations

Conclusions & Recommendations

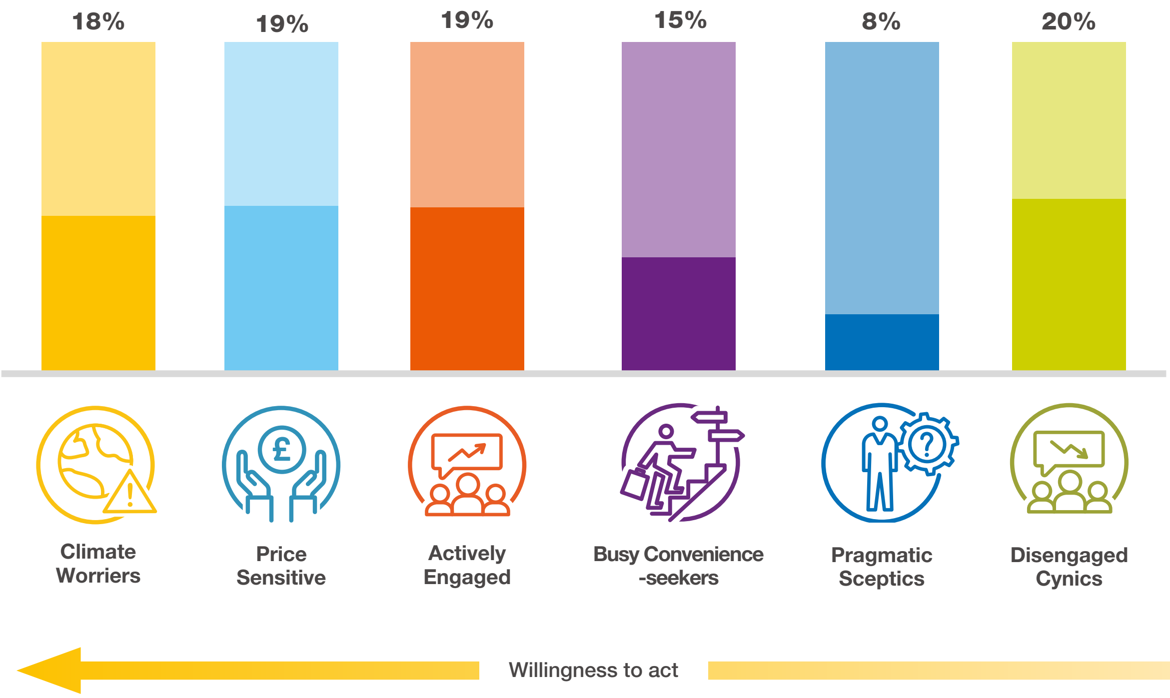
While climate change is increasing as an issue of concern across all demographics – it now ranks alongside Covid, the NHS and the economy in the most important issues facing the country that concern is not evenly spread, nor is the willingness or ability of the public to do something about it.

Only 40% of the population think they have definitely heard of net zero, yet 73% support or strongly support the Government's plans on net zero once explained.

To understand better people's attitudes to climate change, we used our polling to segment the population into six different groups.

Chart 12: Size of each segment

Prevalence of segments in the population



Here, in summary, are some of the characteristics of the segments, their views and some of the barriers that are currently preventing them from making as many changes as they might. These are, of course, also opportunities. Understanding each segment better means being able to identify the most likely entry points into a meaningful conversation or find ways of helping them to overcome their barriers.

Climate Worriers

This group represents 18% of the population and has high levels of home ownership. Climate Worriers are most likely to be retired and are unsurprisingly the oldest of the segments. They are Conservative-leaning. They worry about a lot of things – including climate change (they are the second-most concerned group about climate change). Although likely to be affluent, cost and disruption were still barriers to action. Climate Worriers feel that their actions can make a difference but are overwhelmed by the scale of the challenge. They want to be convinced that it is not all too late already and told in specific detail what they should do to help mitigate the impact of climate change. They have average trust levels and think that the UK should do what it can to tackle climate change, even if other countries do not.

Recommended engagement

This is a high target/first-mover group. *They are already engaged but want more detail about what they should be doing and need to be persuaded that it is not too late, and that concerted action can make a difference. This group will respond to* How To *guides and small incentives to take the green option. They are open to listening to a wide range of trusted parties. Many in this group have time and are willing to act, be that in their personal lives or with local community projects. They just need to be given the inspiration and instruction to know what to do.*

Price Sensitive

In spite of being sensitive to cost, this segment are highly informed and engaged with the climate change agenda and keen to make practical change. They comprise 19% of the population and are focused more on waste and consuming less than on climate directly. They think that the UK should do what it can to tackle climate change, even if other countries did not.

Recommended engagement

A high-target group that will be first-movers if the price is right. *This group is keen to be engaged but can (or will) only make changes that they can afford, or which will cost them less in the longrun, so information about cost savings from turning down heating and using the car less would work well with this group. The Price Sensitive want more information about what is happening already, for example, where their recycling actually ends up. This group is worried about the impacts of climate change on wildlife and for their children and grandchildren. Messages around what we leave behind for the next generation and looking after our planet will resonate with this group, but the message needs to be up-beat: it can be done! This group scores highly on the statement 'I find it difficult to keep up with all the environmental changes I am told to make' suggesting that education is also an issue here.*

Actively Engaged

This group makes up 19% of the population, is highly engaged and aware of current affairs issues generally. They understand and speak confidently about climate change on a global and holistic level rather than focusing only on waste and pollution. They are more than happy to tell others what they ought to be doing. They care deeply about climate change and have consistently the highest scores in caring for the planet and concern about climate change. They score highest when it comes to having already taken actions like turning down their heating and using their cars less. They are among the highest educated of the segments, the most likely to say that they feel their actions will have an impact in reducing climate change and score the highest when it comes to trusting advice on how to live a 'greener' life.

Recommended action

This is a medium-high target group *because it is already engaged and has, in many ways, already made lifestyle shifts. The problem is that this group feels that it is already doing what it can and cannot do more. The issue here is not cost – this is an affluent group willing to spend money for the climate. The best approach for this group is to persuade it to take on a leadership role in engaging others and explaining to them the actions that need to be taken. That, more than anything else, is likely to mobilise this group into moving further.*

Busy Convenience-Seekers

Making up 15% of the population, this group is less engaged in current affairs including in climate change. This does not mean that they don't care – there are issues such as the loss of distinct seasons that worry them more than other groups, but they don't have the time, money or inclination to do much about it. They are the most likely to have children still living at home and are the youngest of the groups by far (therefore also least likely to be retired).

Recommended engagement

This is a medium target group *as it will be difficult to engage them – for now. The fact that so many of them still have children living at home and are least likely to be retired suggests they are leading busy lives where cost and convenience are at a premium. All the same, very high numbers of them say they would make changes if they were cheaper and more convenient, and they scored around the average for thinking that climate change was the most pressing or one of the most pressing issues facing us today. Making environmentally-friendly lifestyle changes for this group will only happen if they believe it will save them money and time. They are likely to engage more as they get older and have more time, but for now, engaging them in the first place will be the challenge.*

Pragmatic Sceptics

This group is the most negative about climate action but make up only 8% of the population. They generally do not prioritise climate change as a concern – only 2% selected it as an important issue facing the country in our poll. However, in focus groups they show far more awareness and concern than this result might suggest. Their attitude is that there is little point in doing anything when businesses and governments are not. Their educational attainment levels are the lowest, and they are among the older of the segments with high numbers retired. They trust no-one other than maybe their friends and family. The only issue on which they scored higher than others was on concerns about the increased living costs to deal with climate change.

Recommended engagement

Our recommendation would be not to concentrate efforts on this group for now. *They have taken a decision that climate change is not an issue – whether that is because they think it is not happening, that its impact on them will be minimal, or that they can do little to change anything – so any engagement is likely to be counterproductive. A lack of social proof and reciprocity is also a major barrier to action for this segment, so showing that other segments (and nations) are making changes will be more effective than direct engagement.*

Disengaged Cynics

Disengaged Cynics are the largest segment (just) at 20% and less informed than the other groups. We would expect them to fall into the other segments as they become more engaged. This segment have the lowest levels of home ownership and are the most likely to fall into the DE socio-economic group. They have more than the average number of children living at home and are among the least likely to be retired.

Recommended engagement

This is a medium-low target group *as some of them will naturally fall into the other segments as awareness of climate change increases generally across society. Others will remain hard to engage (partly like the Busy Convenience-Seekers) because there are more immediate priorities in their lives. In focus groups, they resembled the Price Sensitive group in that they were aware of measures they ought to take but could not afford or were unwilling to take those extra steps. Tackling climate change for this group is about reducing waste and recycling a bit more, rather than about carbon emissions so as well as making environmentally-friendly options cheaper and more convenient, there needs to be some education targeted at this group about what climate change means.*

Bringing this all together

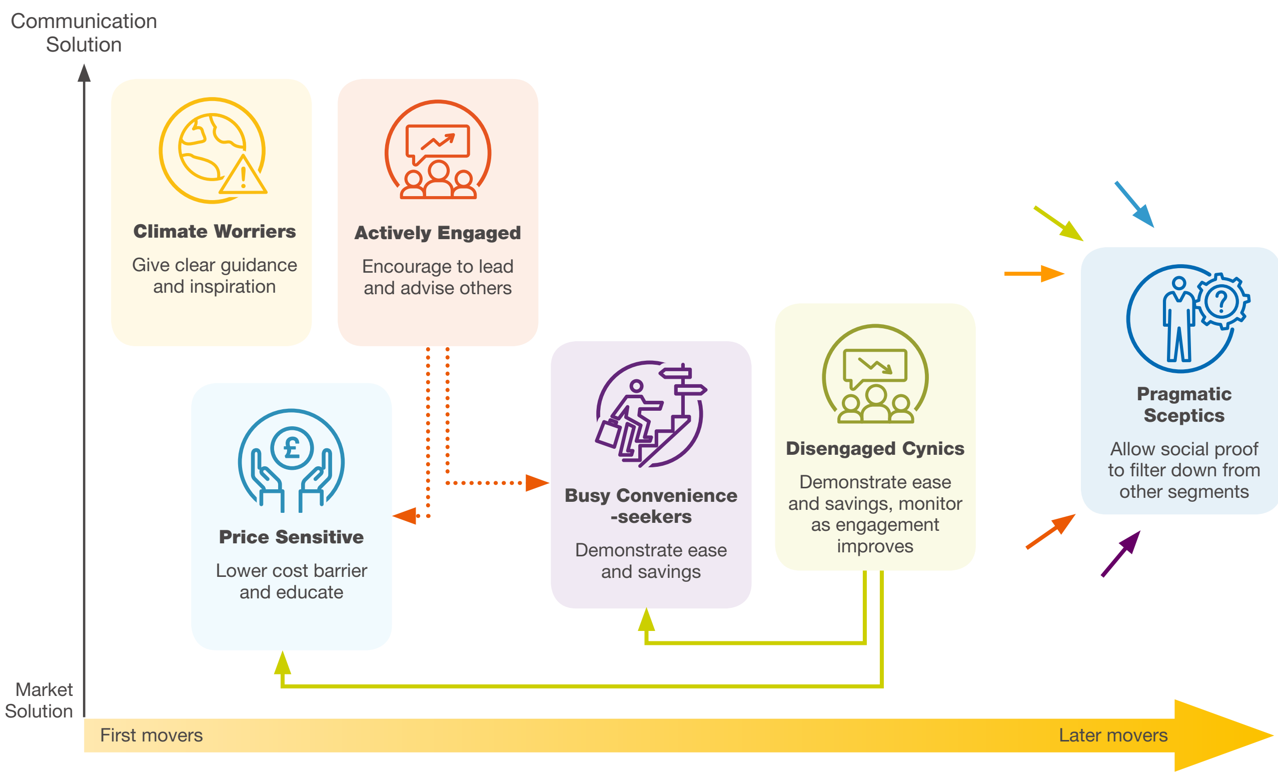
To help practitioners visualise this way of engaging with the segments, we have also produced an 'Engagement Roadmap' that summarises this work. In the roadmap we place each segment along a prioritisation spectrum from first movers to last, and also on an intervention spectrum that shows whether they require a communications-based solution, or market based solutions.

In essence three segments (the Climate Worriers, Price Sensitive and Actively Engaged) become priority audiences. This is 56% of the population and communicating with them requires three distinct strategies:

- Giving clear guidance and inspiration,
- Lowering costs, and
- Encouraging leadership.

This leaves three segments at a lower priority for now: Busy Convenience-seekers will be persuaded by many of the same levers that will convince the Price Sensitive; Disengaged Cynics will gradually move into other segments as climate-related conversations become more widespread, and Pragmatic Sceptics should begin to respond as social proof from other categories filters down to them in the form of new social norms and mandated changes.

It is clear that there is no 'silver bullet' to supporting the public in the energy transition, but by better understanding the different barriers, opportunities and perspectives for members of the public, consumers across the country can be supported in the energy transition.



Appendix A

Appendix A: A guide to socio-economic groupings

In order to better describe the characteristics of each segment, you will see throughout this report that we have used 'social grade' descriptors A, B, C etc. This social grade classification system is based on the occupation of the head of household. It was developed for use on the National Readership Survey (NRS), and for over 50 years NRS has been the research industry's source of social grade data.

There is now significant, and important, debate about the continued relevance of this system. The Office for National Statistics, for example, has moved away from it. However, we decided it was worth using this method to categorise respondents for this research because the system while it lacks the nuance of newer approaches, it is more clearly understood and broadly applied by a large range of researchers, marketeers and communications teams.

Here we reproduce a handy table from the NRS (http://www.nrs.co.uk/nrs-print/lifestyle-and-classification-data/social-grade/) to explain this system to anyone encountering it for the first time, or in need of further clarity.

		% of population (NRS Jan- Dec 2016)
A	Higher managerial, administrative and professional	4%
B	Intermediate managerial, administrative or professional	23%
C1	Supervisory, clerical and junior managerial, administrative and professional	28%
C2	Skilled manual workers	20%
D	Semi-skilled and unskilled manual workers	15%
E	State pensioners, casual and lowest grade workers, unemployed with state benefits only	10%

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Our mission is to enable the transformation to a sustainable energy system and ensure the delivery of reliable, affordable energy for all consumers.

By 2025, we aim to have:

An electricity system that can operate carbon free

A whole system strategy that supports net zero by 2050

Competition everywhere

The ESO is a trusted partner

This means we need to fundamentally change how our system is designed to operate. We are working with the industry to integrate newer technologies across the system and increase demand-side participation.

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