Stay Energy Safe Audience Personas: Report

October 2023



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Agenda



1. Who did we speak to?
2. How is criminality perceived?
3. Experience with meter tampering
4. Response to scenarios tested
5. Response to Stay Energy Safe proposition
6. Identifying key audiences
7. Summary and recommendations

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Project scope - Reminder

Quantitative research was conducted **online from 15th to 25th September**.

To update and provide comparisons to the previous tracking of main KPIs such as awareness, a **nationally representative sample of adults aged 18+** was interviewed, with quotas set on:

- Age
- Gender
- Region
- Socio-economic status

We have interviewed a robust sample of **n=1,507.**

This sample size enables us to truly interrogate the data and conduct sub-group analysis to identify different audience personas

20-minute questionnaire, including the 4 questions that we've been tracking for the last 3 waves in the omnibus.



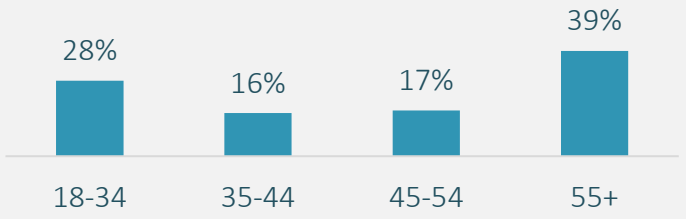
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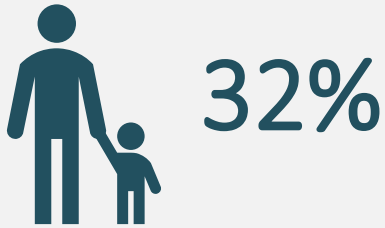
Who did we speak to?

Our sample of n=1,507 adults is representative of the whole UK population in terms of age, gender, ethnicity and SEG

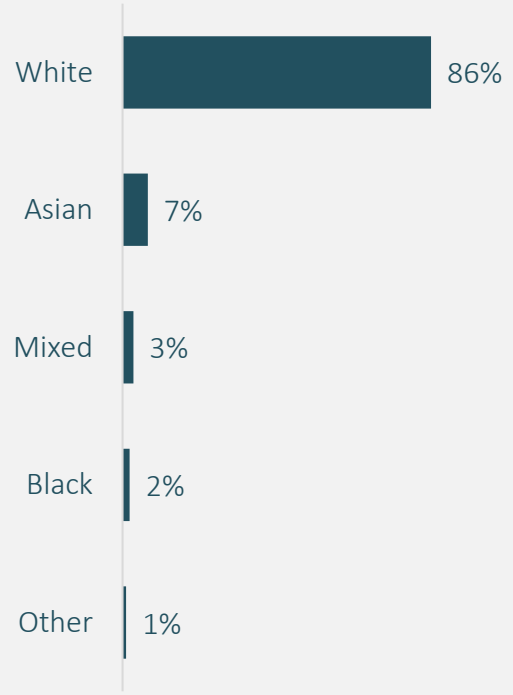
Age



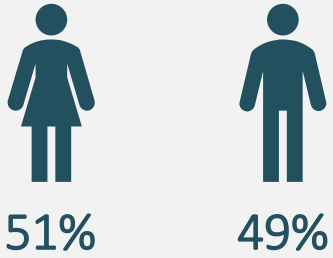
Kids in HH



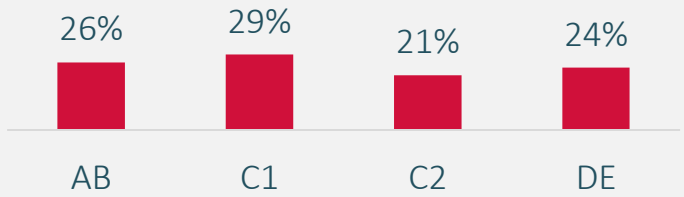
Ethnicity



Gender



SEG



SQ1. What is your age? / SQ2. Are you… / SQ4. Please indicate to which occupational group the Chief Income Earner in your household belongs, or which group fits best. / H5. Who do you live with? / H3. How many children live in your household? / Base: All respondents (n=1,507)

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Reflecting the nation, our sample mostly live in urban and suburban spaces, living in semi-detached houses, terraced houses or flats

Region



Living environment

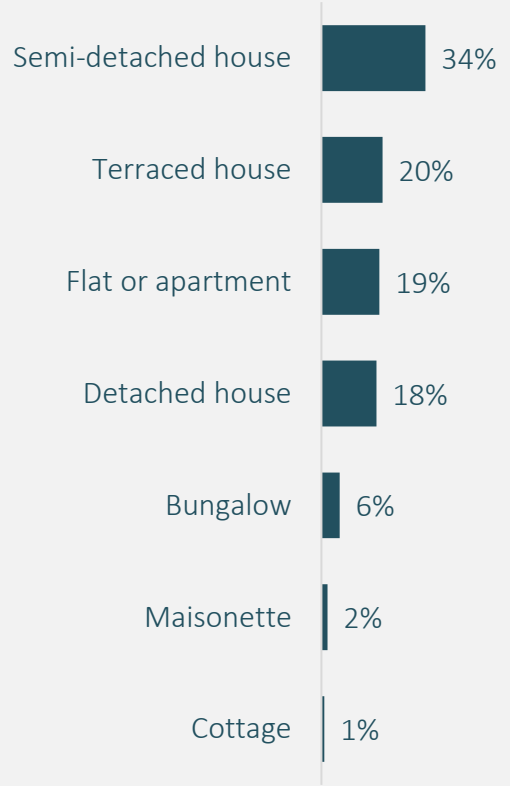
Urban	Suburban	Rural
40%	40%	20%

Home ownership

Own outright	Own with mortgage	Council / Association
33%	27%	17%

Privately rented	Parents / other adults
15%	7%

Home type



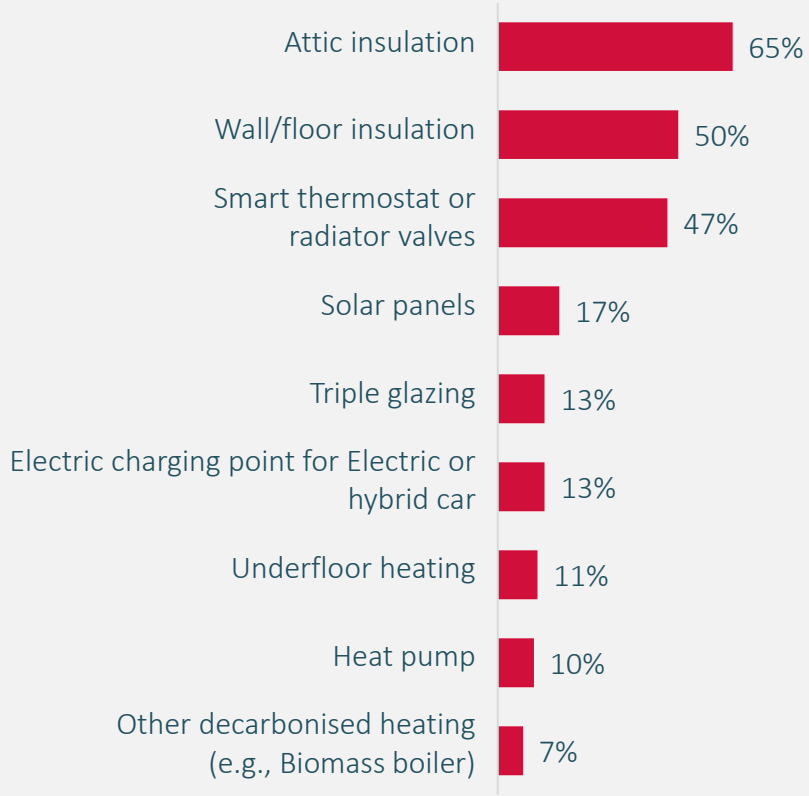
SQ3. Which region do you live in? / H1. Would you describe where you live as being... / B1. Which of the following best describes your home? / B2. And what type of property is your home? / Base: All respondents (n=1,507)

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Insulation, whether it is in the attic or for wall/floor is the most common home improvements, followed by smart thermostats

Home EV charging points are expected to double from 6% to 13% in the next 12 months

Home improvements
(already have / plan to install in N12M)



High energy items in HH

Tumble dryer	Dishwasher	Electric charging point	Hot tub	Swimming pool	Sauna/ Steam room
51%	47%	6%	5%	2%	1%



Are luxury water items users



Don't have any of these items

B3. Which of the following, if any, do you currently have or do you intend to install within the next 12 months in your home? / B4. Which of the following, if any, do you currently have in your home? / Base: All respondents (n=1,507)

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5 in 6 UK homes use mains gas

On average dual fuel homes are spending £1700+ per annum on energy bills

HH energy type

Electricity	96%
Gas	84%
Fuel oil	5%
Other	3%

81% Have both electricity AND gas

Energy bills payments

Average

Electricity (per month)	£104
Gas (per month)	£92
Electricity & Gas (same supplier, per month)	£143
Fuel oil (per year)	£988



B5. Which of the following types of energy do you use in your home? / B7. On average, how much does your household spend per month on the following type of energy? / Base: All respondents (n=1,507), Pay electricity independently (n=373), Pay gas independently (n=202), Pay gas & electricity from same supplier (n=1,048), Have fuel oil (79)

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The cost-of-living crisis means that 42% are worried about their personal finances

(answered ‘7’ to ’10’)

Q1. How worried are you about your personal finances? Please answer on a scale of 0 to 10, where 10 is ‘Extremely worried’ and 0 is ‘not worried at all’. / Base: All respondents (n=1,507)

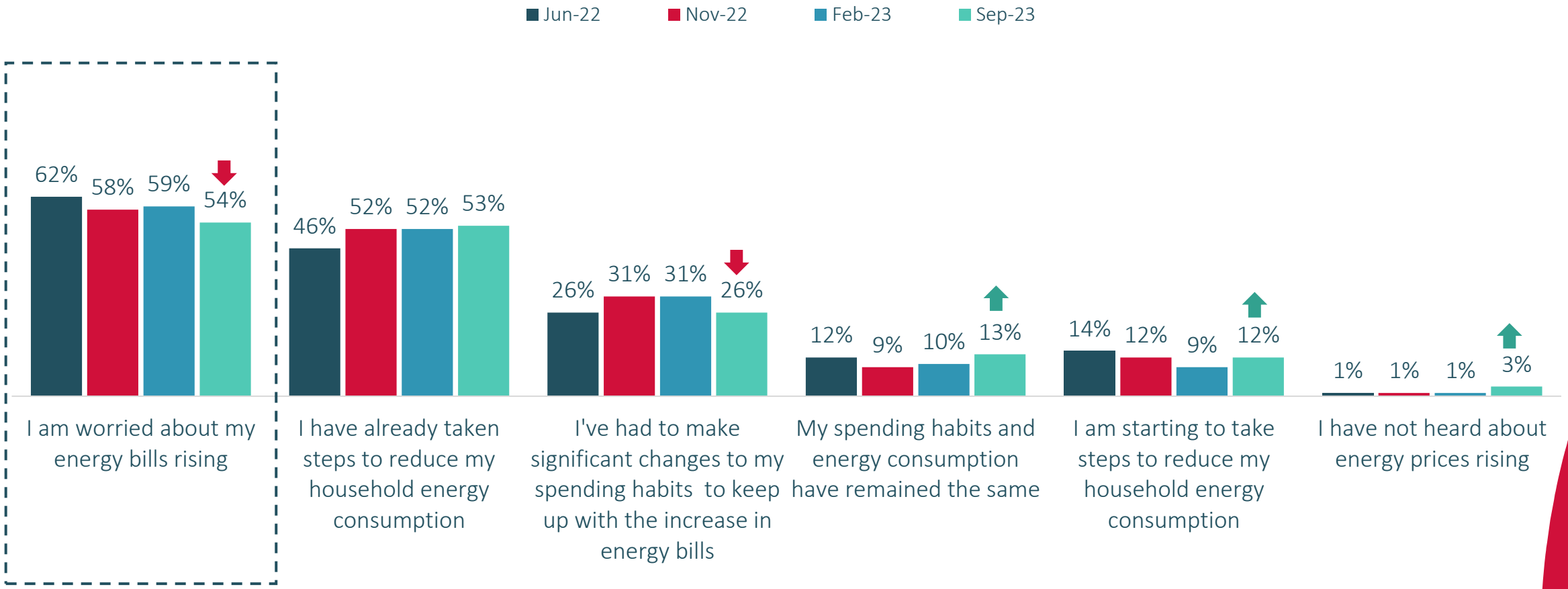
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Worries around bill increases are down compared to last wave

This is likely due to seasonality as the last wave was conducted in winter, and energy prices have since fallen from their highs

Omnibus

Attitudes towards bills increase – Total sample



C2. Most people in the UK have experienced an increase in their household bills in recent months. Which of the following statements, if any, have been applicable to you? Base: Total Sample November 2022 (n=2090), Total Sample February 2023 (n=2076), Total Sample September 2023 (n=1507)

Significant increase/decrease vs. previous wave @ 95%

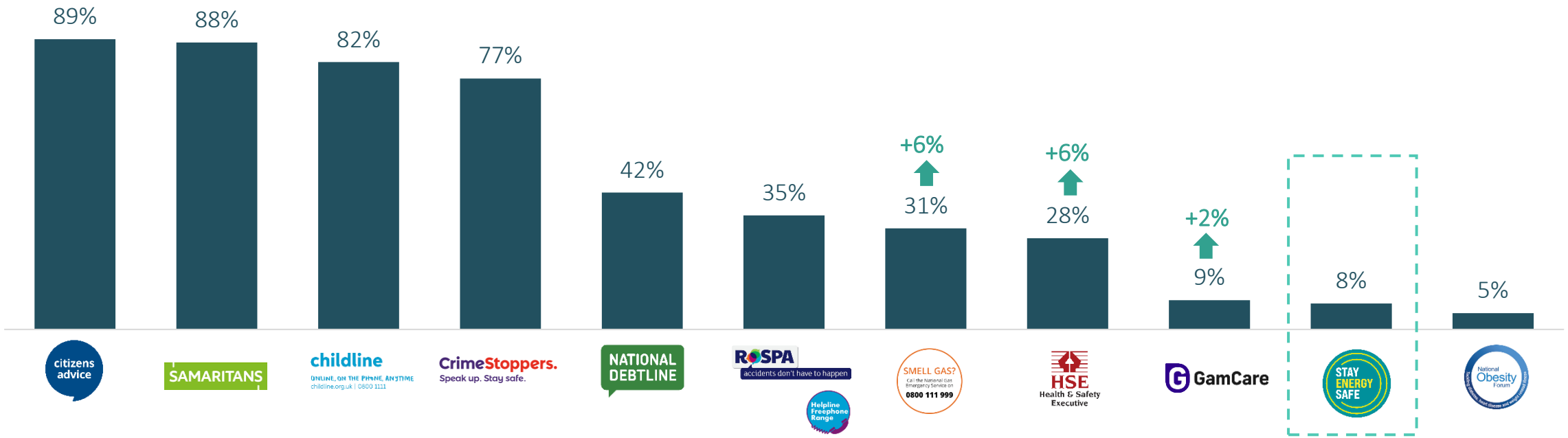
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Stay Energy Safe's awareness remains low and stable WoW

National Gas Emergency Service and HSE Gas Safety Advice Line have both seen increases

Omnibus

Brand Awareness – Total Sample



Q1. Which, if any, of the following organisations do you recognise?
Base: Total sample September 2023(n=1507)

Significant increase/decrease vs. previous wave @ 95%

-X% +X% Change since February 2023

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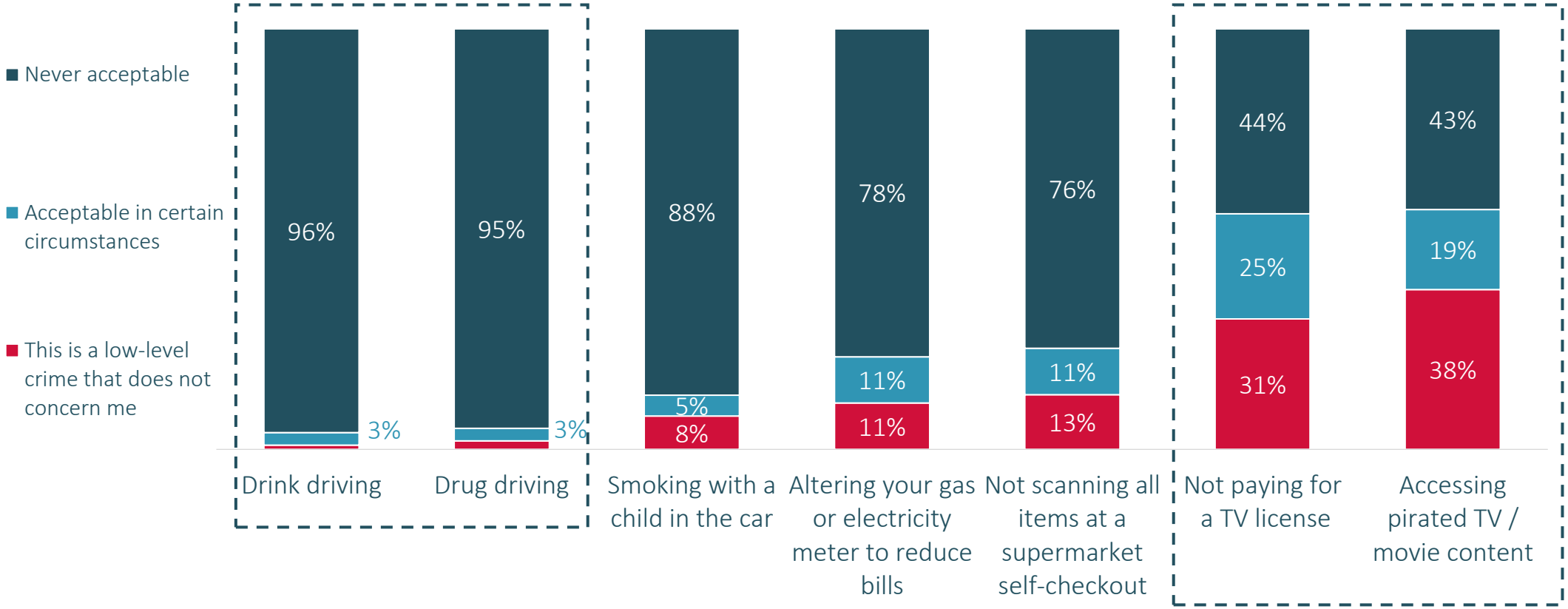
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How is criminality perceived?

Drink and Drug Driving were the least acceptable crimes

Not paying for a TV license and Accessing pirated TV/movie content were deemed more low-level crimes or acceptable in certain circumstances

Perceptions of criminality – Total sample



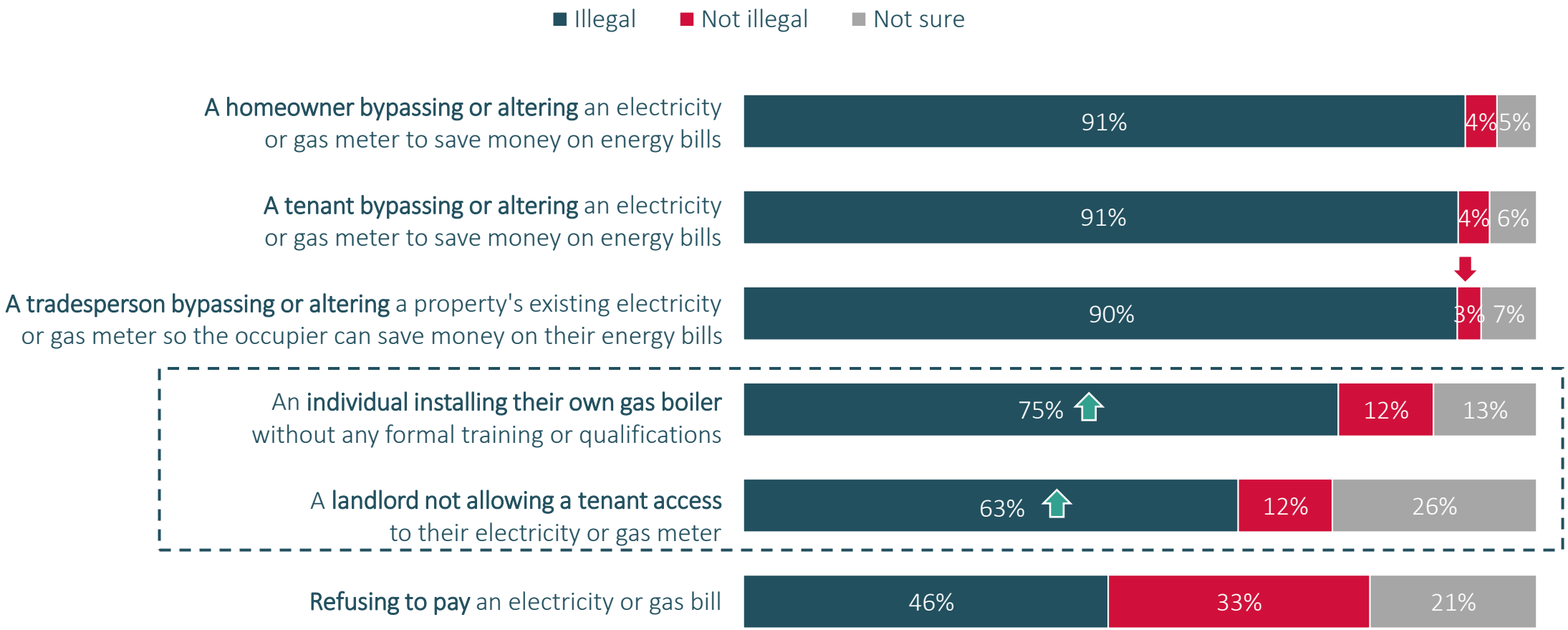
Base: All respondents (n=1,507)

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More people now know that an individual installing their own gas boiler or a landlord not allowing access to the meter is illegal

Omnibus

Perceptions of criminality around energy – Total sample



D2. Which, if any, of the following activities do you think are illegal or not...
Base: Total Sample February 2023 (n=2076), Total Sample September 2023 (n=1507)

Significant increase/decrease vs. previous wave @ 95%

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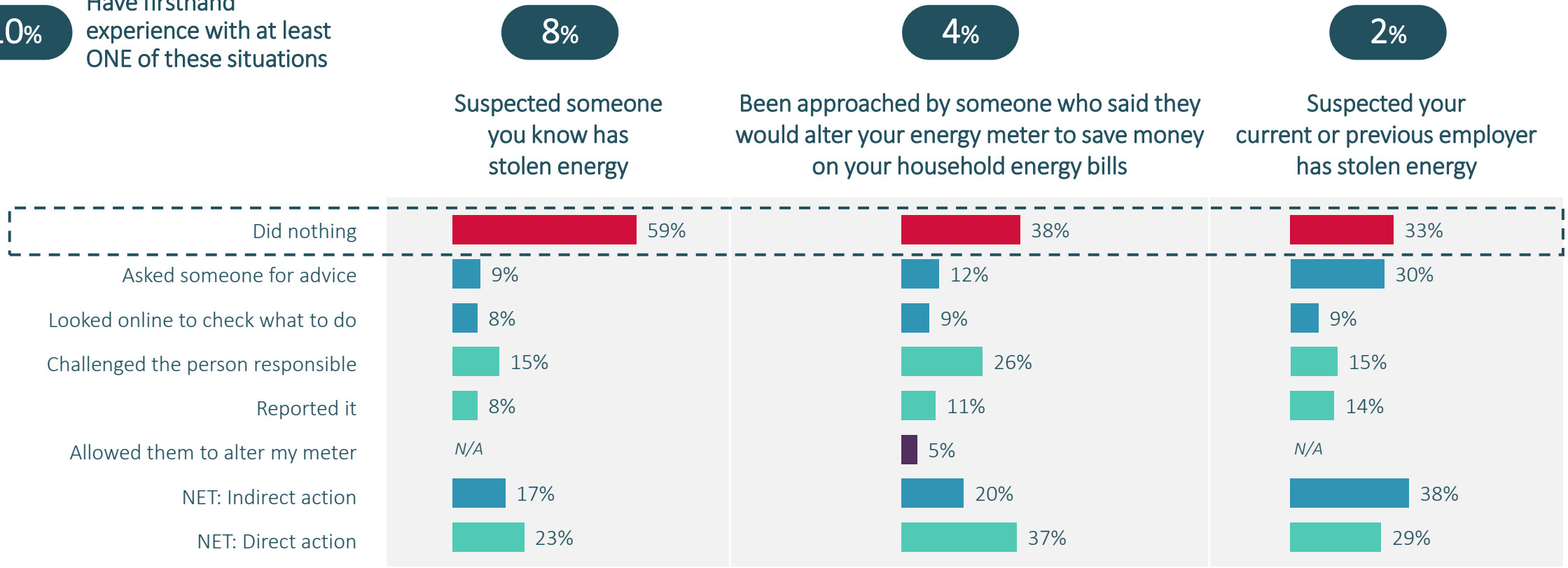
Experience with meter tampering

1 in 10 have some firsthand experience of meter tampering but a majority did nothing about it

In fact, doing nothing was most pronounced when respondents personally knew the person they suspected

Meter tampering firsthand experience & Action – All respondents

10% Have firsthand experience with at least ONE of these situations



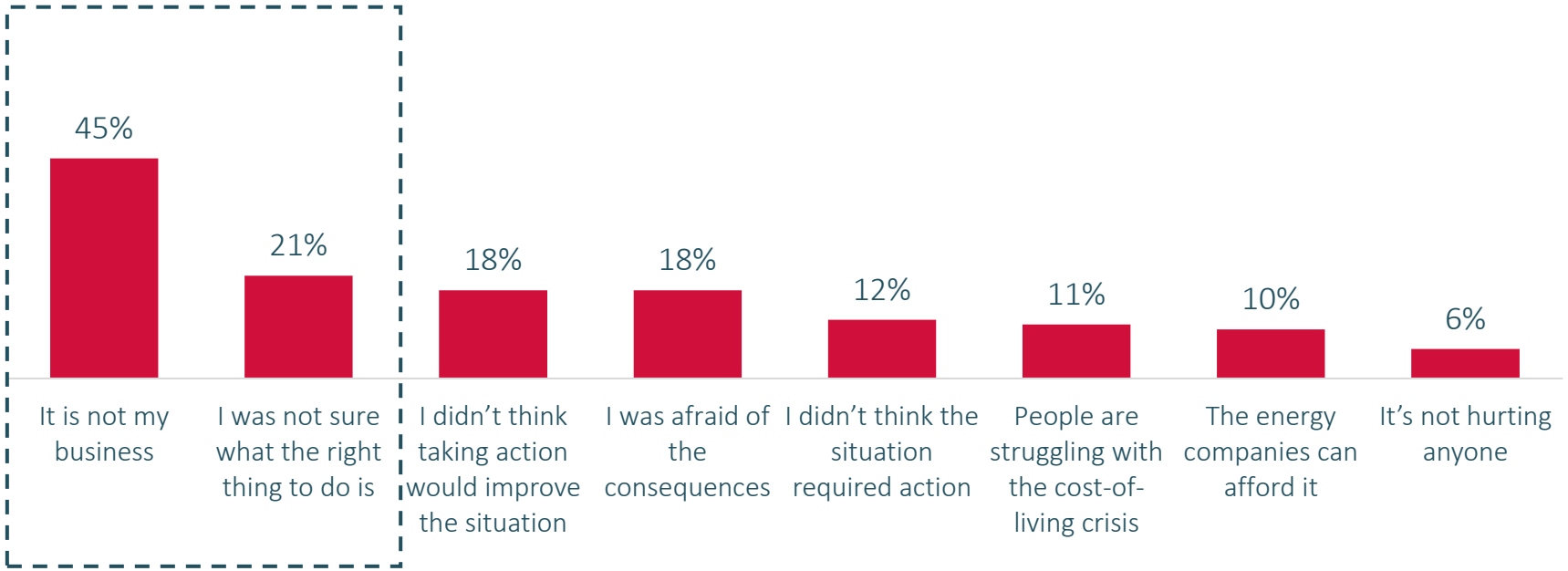
Base: All respondents (n=1,507), Encountered situation 1 (n=112), Situation 2 (n=55), Situation 3 (n=35)

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Feeling it is ‘not their business’ was the leading reason for doing nothing

Fear and uncertainty of what to do and how it could improve the situation were also cited

Did nothing when encountered situation – All responses combined – Did nothing in at least one situation





F3. You said that you chose not to do anything, why was this? / Base: Did nothing in at least one situation (n=100)

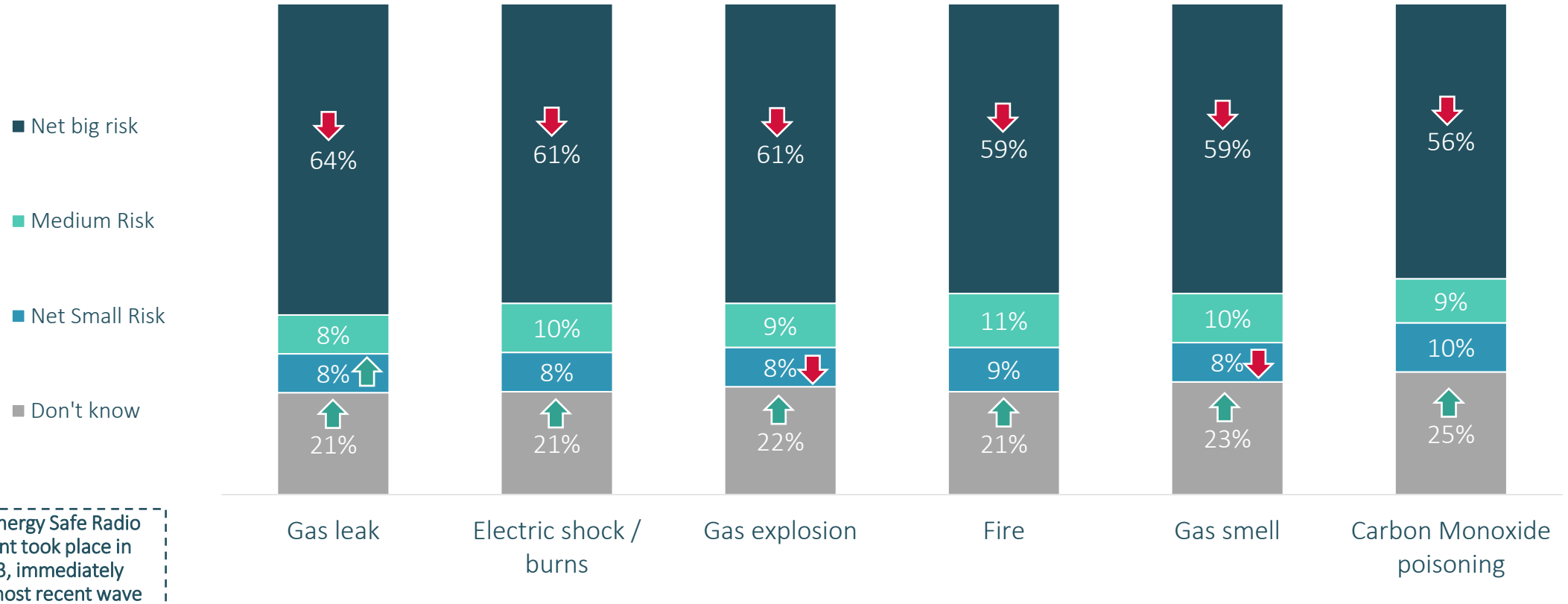
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Levels of perceived risk have declined since last wave

Possibly due to the lack of above the line advertising this wave

Omnibus

Risk associated with meter tampering awareness – Total Sample



Note: Stay Energy Safe Radio advertisement took place in January 2023, immediately before the most recent wave of tracking

F1. If a person were to bypass or alter their gas or electricity meter to give the appearance
Base: Total sample, September 2023 (n=1507)

Significant increase/decrease vs. previous wave @ 95%

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Response to scenarios testing

We wanted to test the hypothesis that people may be more/less likely to report depending on who they suspected of energy theft…

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We asked respondents to imagine some scenarios, and how they would respond to them

This is a technique often used in market research to measure respondents' reaction to illegal matters for which they might not be honest if asked directly

Thank you for your time so far. We are now going to show you some different scenarios that people may find themselves in. Please answer the following questions as honestly as possible, your answers will be kept confidential.

We are now going to ask you about some hypothetical scenarios.
What would you do if you suspected the following person / organisation was stealing energy?

Scenarios:

- *A wealthy person*
- *A person struggling to pay their bills*
- *Your employer*
- *A local business*

Reactions options:

1. *Do nothing*
2. *Ask someone for advice*
3. *Look online to check what to do*
4. *Challenge the person responsible*
5. *Report it*

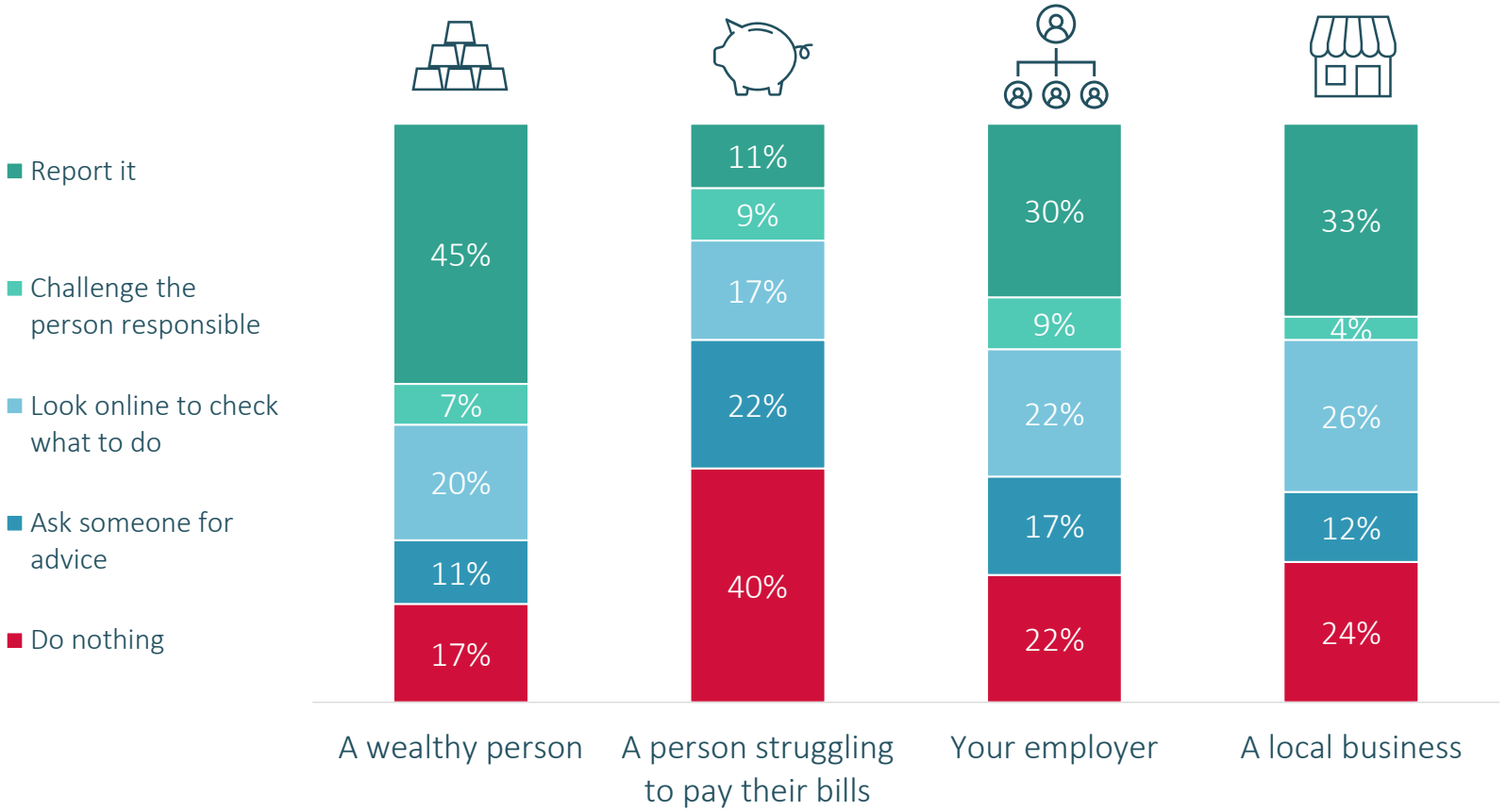


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At a total level, almost half claim they would report a wealthy person if they suspected them of stealing energy

However, 4 in 10 said they would do nothing if it was a person struggling to pay their bills

Scenario testing – How would react – All respondents



Nets:	
Would report in ALL scenarios	10%
Would NOT report in ALL scenarios	48%
Would do nothing in ALL scenarios	14%

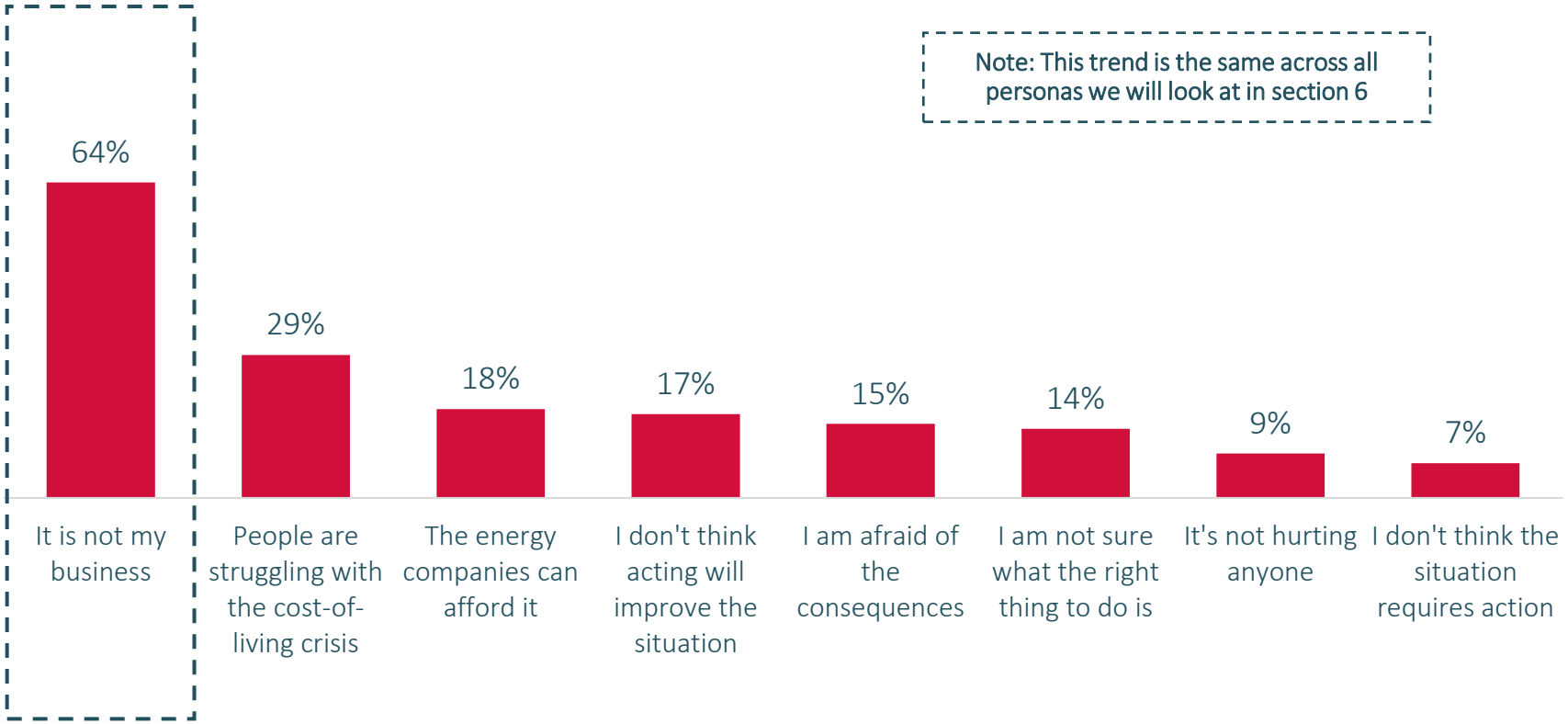
E4. Which, if any, of the following would you do if you suspected that a person / organisation was stealing energy? / Base: All respondents (n=1,507)

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‘It is not my business’ also ranked the top reason for doing nothing in hypothetical scenarios

3 in 10 further said that people are already struggling with the cost-of-living crisis

Would do nothing if encountered one of the 4 scenarios – All responses combined – Would do nothing in at least one scenario



Note: This trend is the same across all personas we will look at in section 6



Base: Would do nothing in at least one situation (n=1,574)

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Response to Stay Energy Safe proposition

Reminder of the Stay Energy Safe proposition tested

Stay Energy Safe is an independent service operated by the charity Crimestoppers. The service aims to keep people and communities safe from the disastrous effects of energy crime, by increasing awareness and encouraging people to report energy theft, 100% anonymously, if they suspect it is happening.

Energy theft, or meter tampering, is when people interfere with their electricity or gas meters or remove them completely, to reduce their energy bills. This is extremely hazardous and puts people and communities in danger as it can lead to electrocutions, fires and gas explosions that result in damage to property, injury and even, in some cases, death.

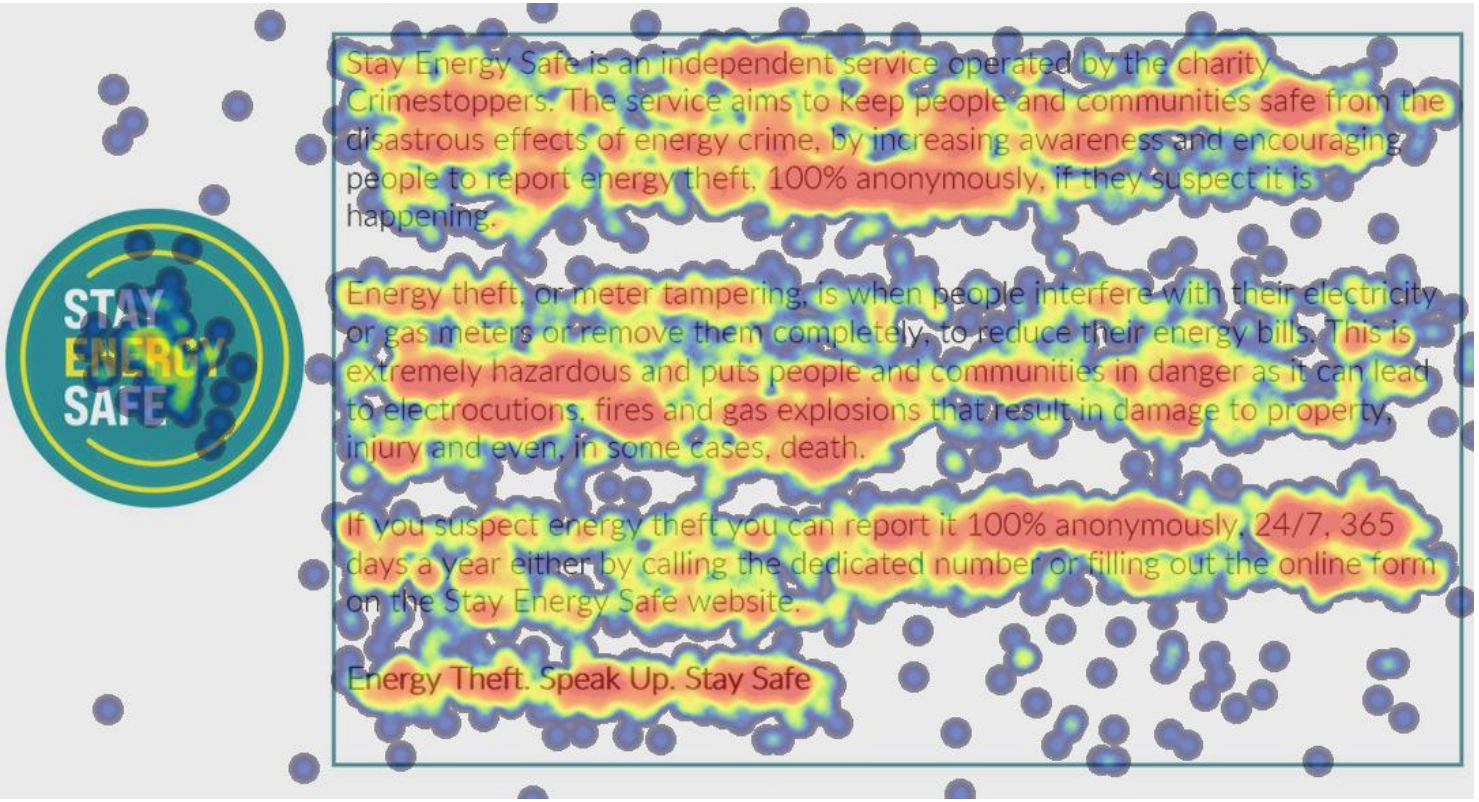
If you suspect energy theft you can report it 100% anonymously, 24/7, 365 days a year either by calling the dedicated number or filling out the online form on the Stay Energy Safe website.

Energy Theft. Speak Up. Stay Safe

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Response to Stay Energy Safe is very positive, with almost 3 in 4 liking the proposition, and a lot of areas highlighted as useful

Response to the proposition – Total sample



71% liked the proposition:

- 43% liked it ‘a lot’
- 28% liked it ‘a little’

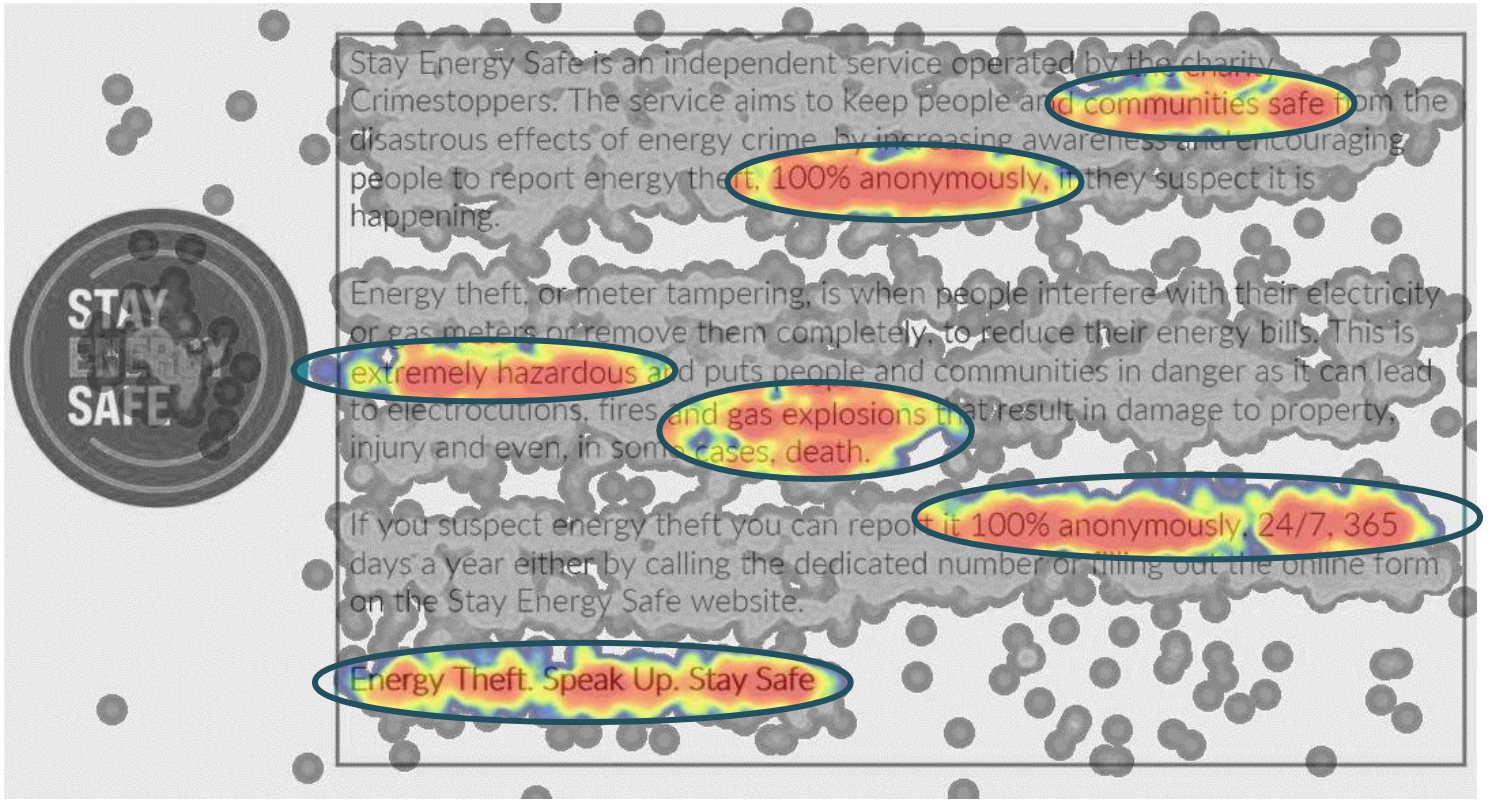
Q4. To what extent do you like or dislike Stay Energy Safe? / Q5. Which parts of the description of Stay Energy Safe, if any, did you find most useful? / Base: All respondents (n=1,507)

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When looking at the most highlighted areas, the danger message and being 100% anonymous come out the most strongly

Protecting and keeping ‘communities’ safe also resonated well

Most Useful Parts of Proposition – Heat Map - Total Sample



> This is a good idea, to report some one you suspect of stealing energy. The result of this could be dangerous, risk to life, stop people from getting hurt, prevent damage.

> Sounds like a very good idea. I had no idea, until today, that these crimes existed

> I think it’s a really good idea. I’d never heard of it, I like the fact it’s anonymous. I wonder who investigates any reports? Energy companies or the police? Makes me feel a bit sad that it’s needed though. I don’t think people realise the serious consequences of meter tampering.

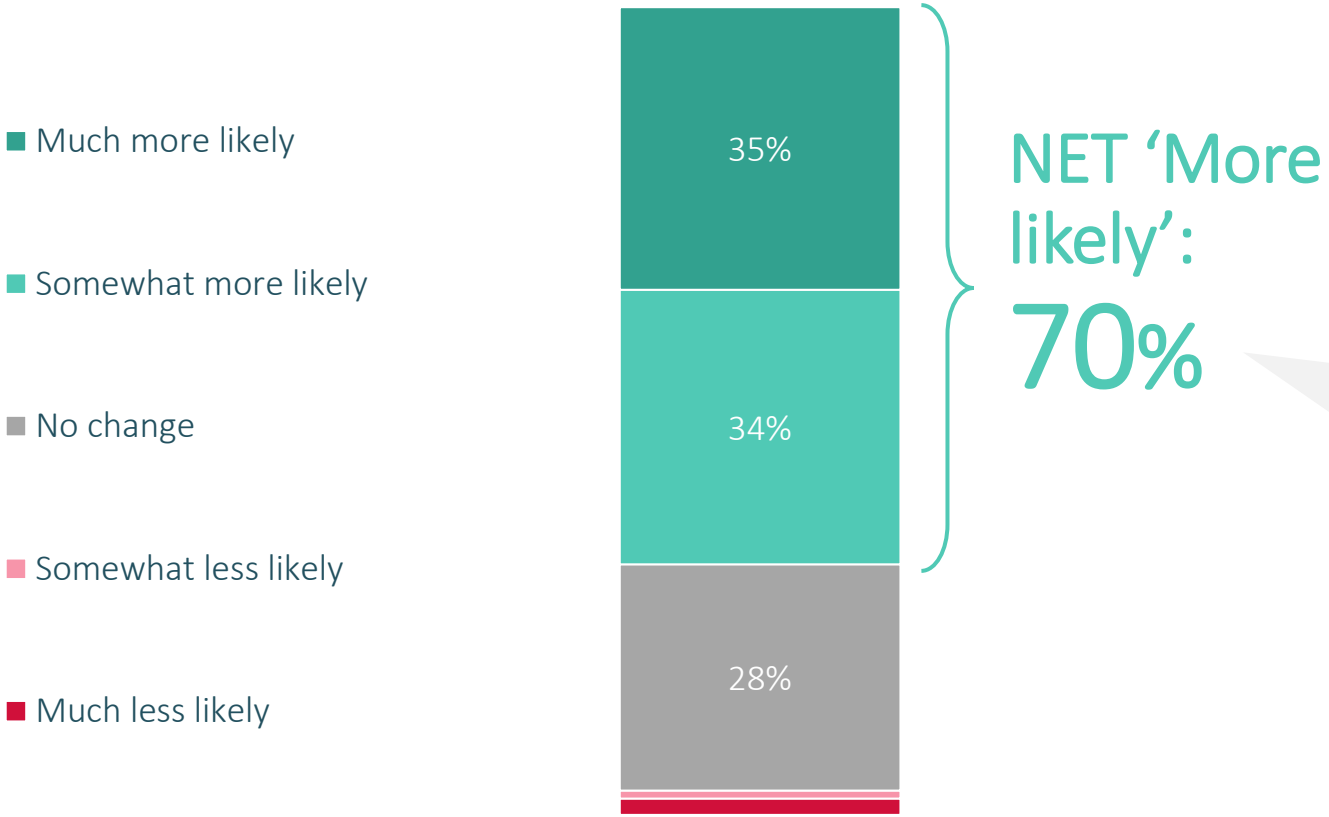
EE1. What parts of the description of Stay Energy Safe if any do you find most interesting? Please use your own words, what do you think about Stay Energy Safe? / Base: All respondents (n=1,507)

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After reading the proposition, 7 in 10 said they would be more likely to report Energy Theft

3 in 4 claiming to be more likely to report, said they would report to Stay Energy Safe

Likelihood to report energy theft after seeing proposition – Total sample



STAY ENERGY SAFE

75%

of those more likely to report would report to **Stay Energy Safe**

F6. Thinking about everything you now know about Stay Energy Safe, how much more or less likely would you be to report Energy Theft to Stay Energy Safe? Base: All respondents (n=1,507), Would report energy theft (n=1052)

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Identifying key audiences

We've been inspired by the personas you shared with us in exploring consumer groupings that we think will help you better understand energy theft

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We've identified the following 6 groups

1 Firsthand Experience of energy theft

10%



HOW DID WE DEFINE THEM? People who have already encountered a situation where they have suspected or been approached by someone to steal energy.

2 Consider 'altering meter to reduce bills' low-level crime

11%



HOW DID WE DEFINE THEM? Said that 'altering your gas or electricity meter to reduce bills' is a low-level crime that does not concern them.

3 Aware of Stay Energy Safe

8%



HOW DID WE DEFINE THEM? All those aware of Stay Energy Safe pre proposition exposure.

4 Would definitely report energy theft

10%



HOW DID WE DEFINE THEM? All those who said they would report Energy Theft in all 4 scenarios.

5 Non-reporters that you could persuade

32%



HOW DID WE DEFINE THEM? People who said they would not report Energy theft in all 4 scenario (but could do other actions, such as for e.g. looking for information online). After reading the Stay Energy Safe proposition, they said would be likely to report energy theft.

6 Would do nothing but could be persuaded

6%



HOW DID WE DEFINE THEM? People who said they would do nothing in all 4 scenarios of Energy Theft (not even indirect actions). However, after reading the Stay Energy Safe proposition, they said would now be likely to report energy theft if they came across it.

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When looking at the size of each group in terms of UK Households…

1 Firsthand Experience of energy theft



10% = 2,820,000 HH

2 Consider 'altering meter to reduce bills' low-level crime



11% = 3,102,000 HH

3 Aware of Stay Energy Safe



8% = 2,256,000 HH

4 Would definitely report energy theft



10% = 2,820,000 HH

5 Non-reporters that you could persuade



32% = 9,024,000 HH

6 Would do nothing but could be persuaded



6% = 1,692,000 HH

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Firsthand Experience of energy theft

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Firsthand Experience of energy theft

Compared to the total sample, these people are more likely to be living in a rented flat in urban areas such as London. They are also more likely to read newspapers and use Twitter.

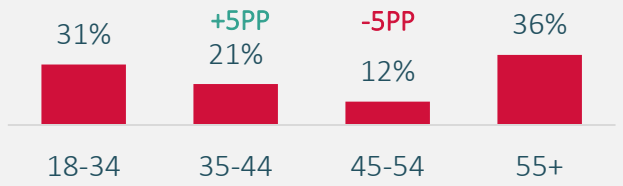


This group is defined by all those who said **'yes', to any of the 3 situations at question E1**:

1. Suspected someone you know has stolen energy
2. Been approached by someone who said they would alter your energy meter to save money on your household energy bills
3. Suspected your current or previous employer has stolen energy

Age

Average age: 46



Gender

47% 53%

Awareness

11% Aware of Stay Energy Safe

Kids in HH

36%

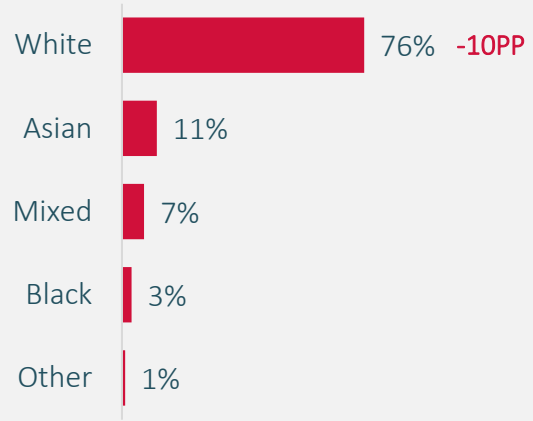
Media consumption

- More likely to listen to **podcasts** weekly (39% vs 29%)
- More likely to read printed and online **newspapers / magazines** weekly (40% vs 30% and 64% vs 56%)
- More likely to use the following social media:

Where do they live?

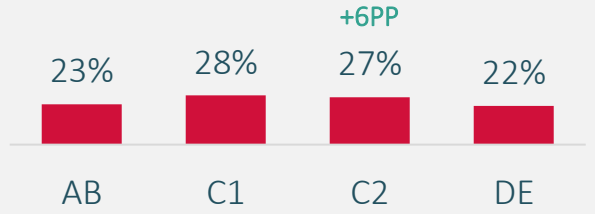
- More likely to live in a **rented home** (40% vs 32%)
- **More likely to live in a flat** (24% vs 19%)
- More likely to live in home **rented from Housing Association or Local Authority** (24% vs 17%)
- More likely to live in an **urban environment** (56% vs 40%)
- More likely to live in **London** (19% vs 13%)
- More likely to have already installed **all types of home improvement**

Ethnicity



SEG

Avg HH income: £39,521



All those who have firsthand experiences (n=154)

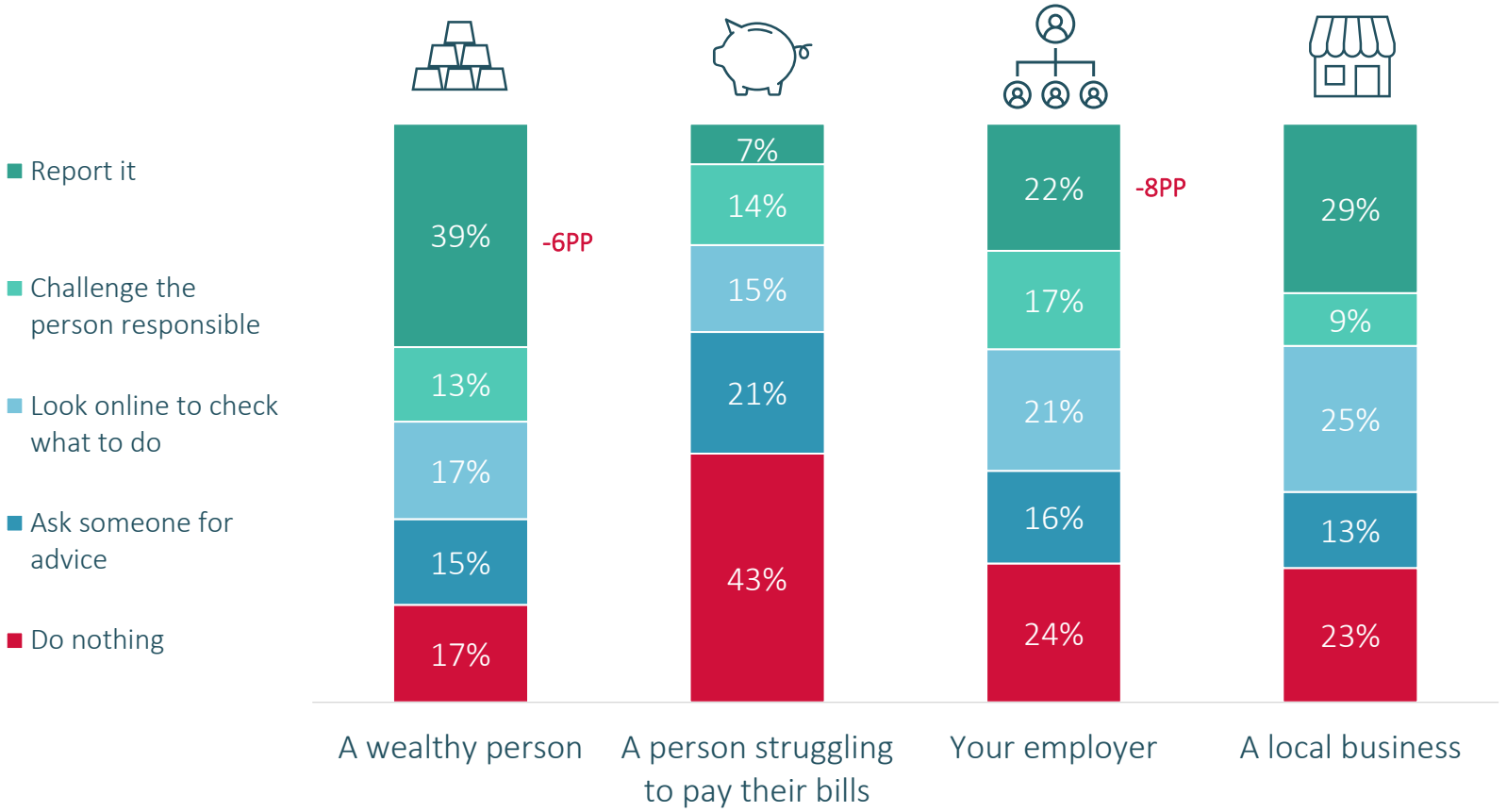
+5PP / -5PP = higher/lower vs total sample

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Firsthand Experience of energy theft

Interestingly, they are less likely to report in all scenarios, particularly a wealthy person or employer if they suspected them of stealing energy.

Scenario testing – How would react – Firsthand experience



Nets:	
Would report in ALL scenarios	-6PP 4%
Would NOT report in ALL scenarios	50%
Would do nothing in ALL scenarios	11%

E4. We are now going to ask you about some hypothetical scenarios. What would you do if you suspected that someone was stealing energy? (All those who had firsthand experiences (n=154)

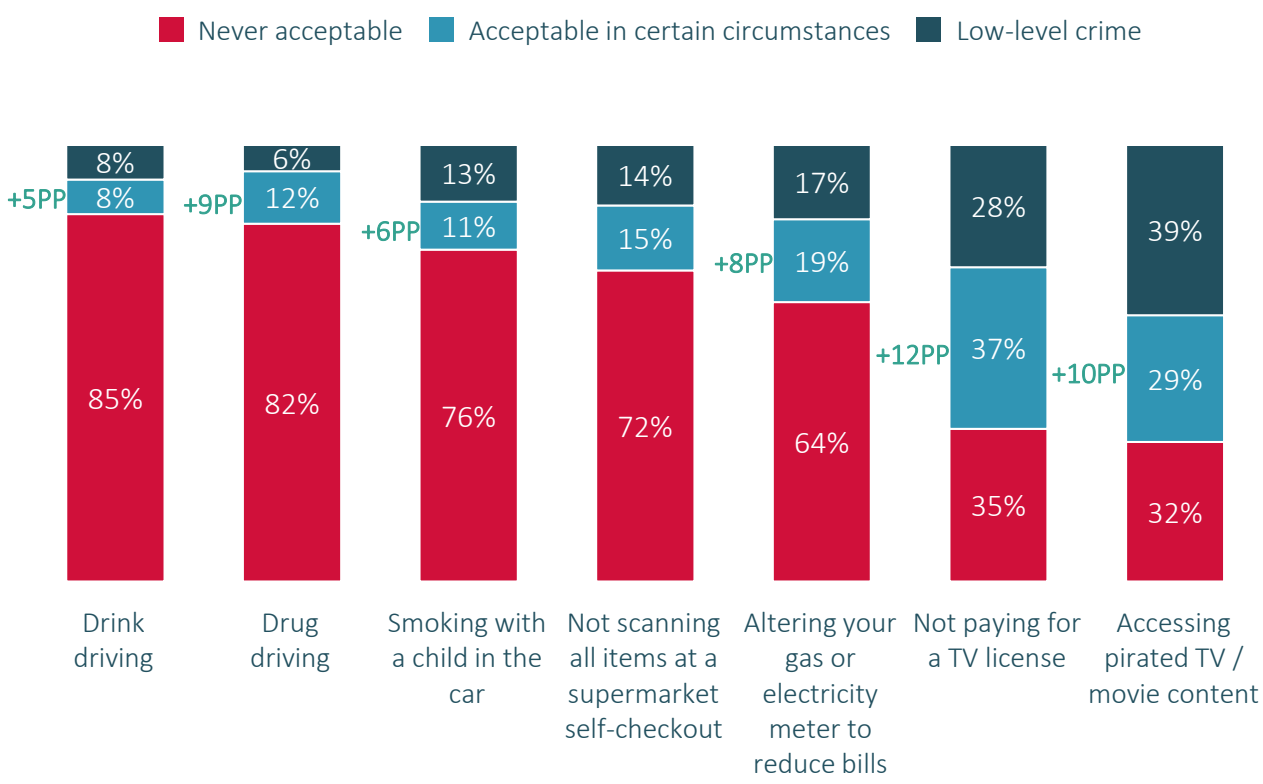
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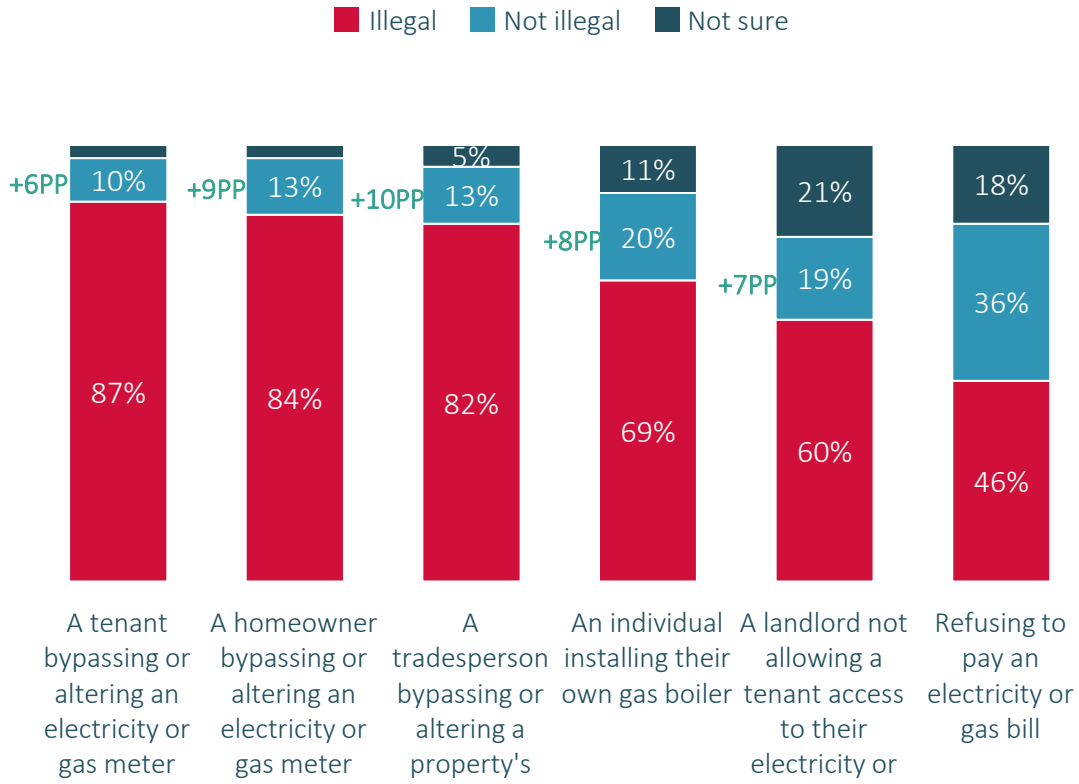
Firsthand Experience of energy theft

Perceptions of criminal & illegal activities / practices is lower among those with firsthand experiences of energy theft

Criminality – % – Firsthand experience



Illegality – % – Firsthand experience



D1. To what extent do you believe the following behaviours are acceptable or not?/
D2. Would you say each of the following behaviours is illegal or not?
Base: All those who have firsthand experiences (n=154)

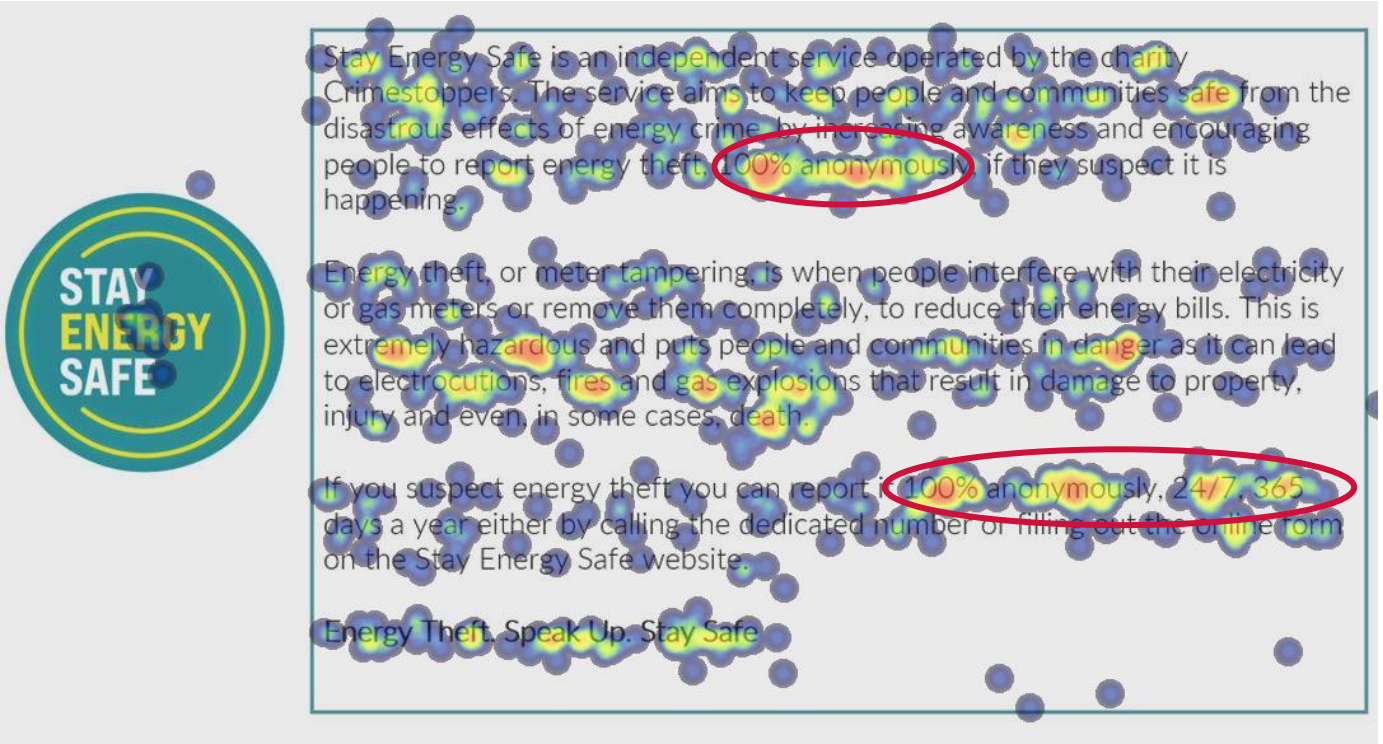
+5PP / -5PP = higher/lower vs total sample

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Firsthand Experience of energy theft

The ‘anonymous’ message is the part of the proposition that resonates the most for this group

Most Useful Parts of Proposition – Heat Map - Firsthand experience



Stay Energy Safe awareness before seeing the proposition

11%

Likelihood to use Stay Energy Safe after seeing the proposition – “Much more likely”

34%

EE_W1 Do you recall seeing or hearing any of the following in the last 12 months?
Base: All those who have firsthand experiences (n=154)

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Consider ‘altering meter to reduce bills’ low-level crime

Consider ‘altering meter to reduce bills’ low-level crime

This group are more likely to be 18-34 living in a rented flat. They are more likely to use a range of social media platforms, listen to podcasts and watch online videos

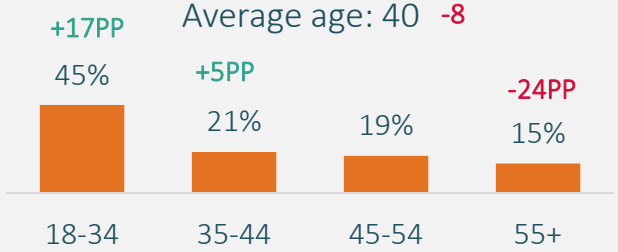


% of UK population

This group is defined by all those who said that ‘**altering your gas or electricity meter** to reduce bills’ is a **low-level crime** that **does not concern them.**

Age

Average age: 40 -8



Gender

48% 52%

Awareness

7% Aware of Stay Energy Safe

Kids in HH

33%

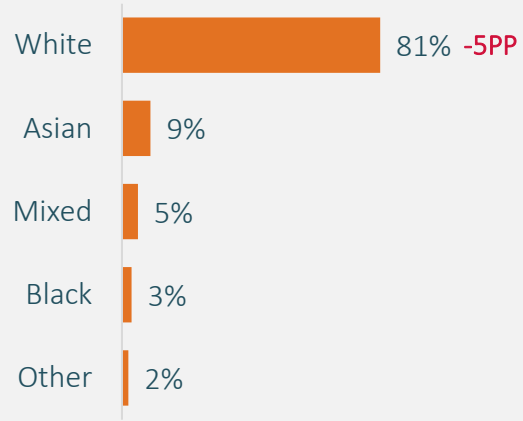
Media consumption

- More likely to use social media, listen to podcasts and watch online videos weekly
- Less likely to watch live TV, listen to the radio and read newspapers / magazines
- More likely to use the following social media:

Where do they live?

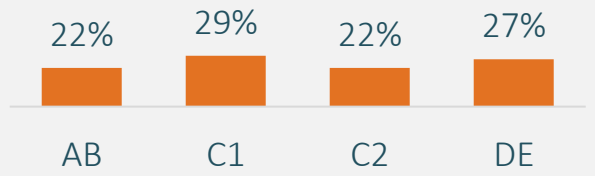
- More likely to live in a **rented home** (46% vs 32%)
- More likely to live in a **flat** (24% vs 18%)

Ethnicity



SEG

Avg HH income: £38,969



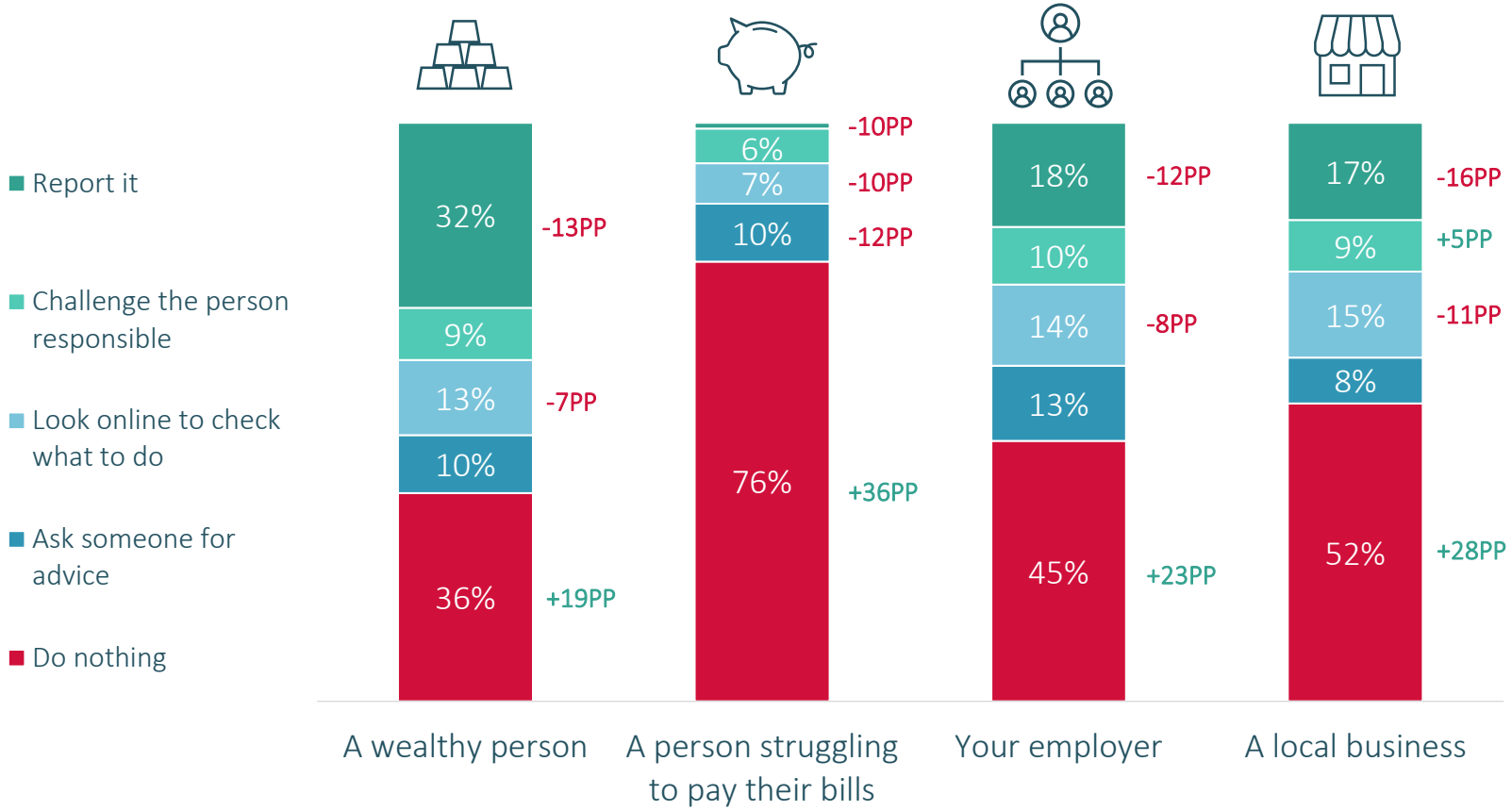
All those who think altering their meter to save money on bills is a low-level crime (n=169) +5PP / -5PP = higher/lower vs total sample

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Consider ‘altering meter to reduce bills’ low-level crime

This group are most likely to do nothing in all 4 scenarios, particularly for a person struggling to pay their bills

Scenario testing – How would react – Consider meter tampering a low-level crime



Nets:	
Would report in ALL scenarios	-10PP 0%
Would NOT report in ALL scenarios	+12PP 60%
Would do nothing in ALL scenarios	+22PP 36%

E4. We are now going to ask you about some hypothetical scenarios. What would you do if you [insert scenario]? Base: All those who think altering their meter to save money on bills is a low-level crime (n=169)

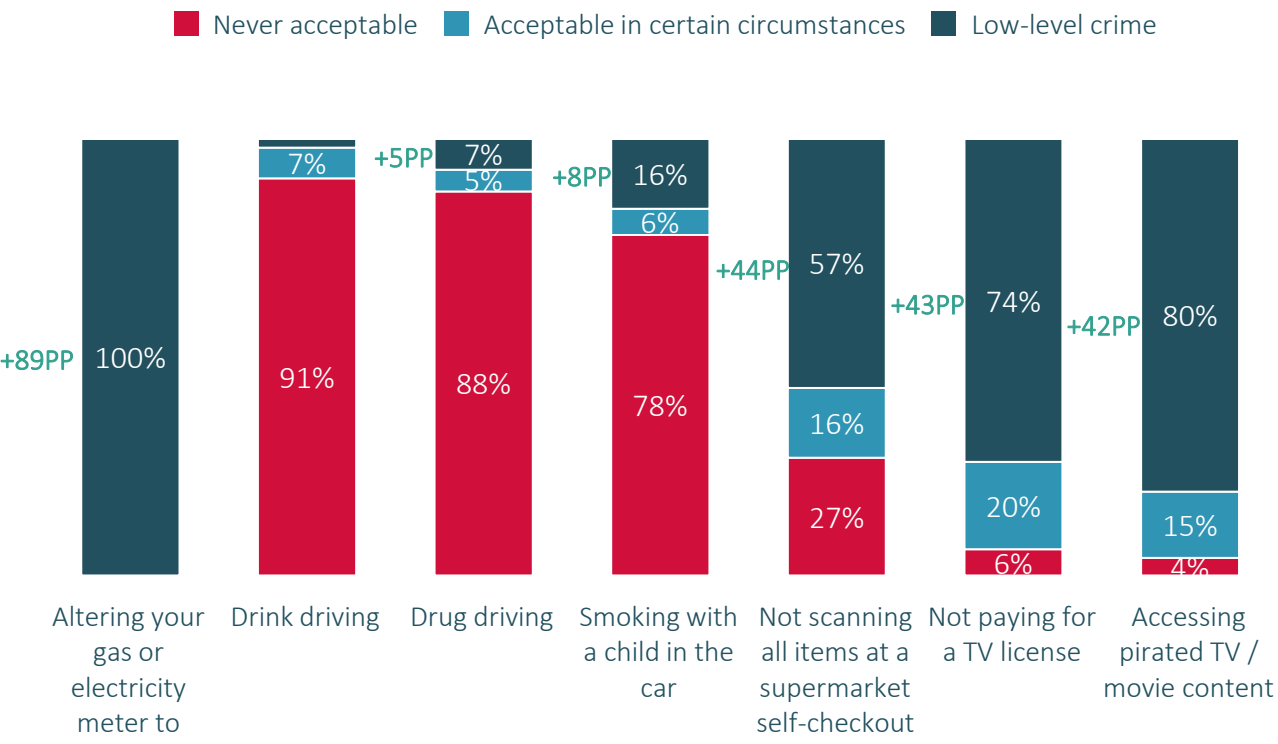
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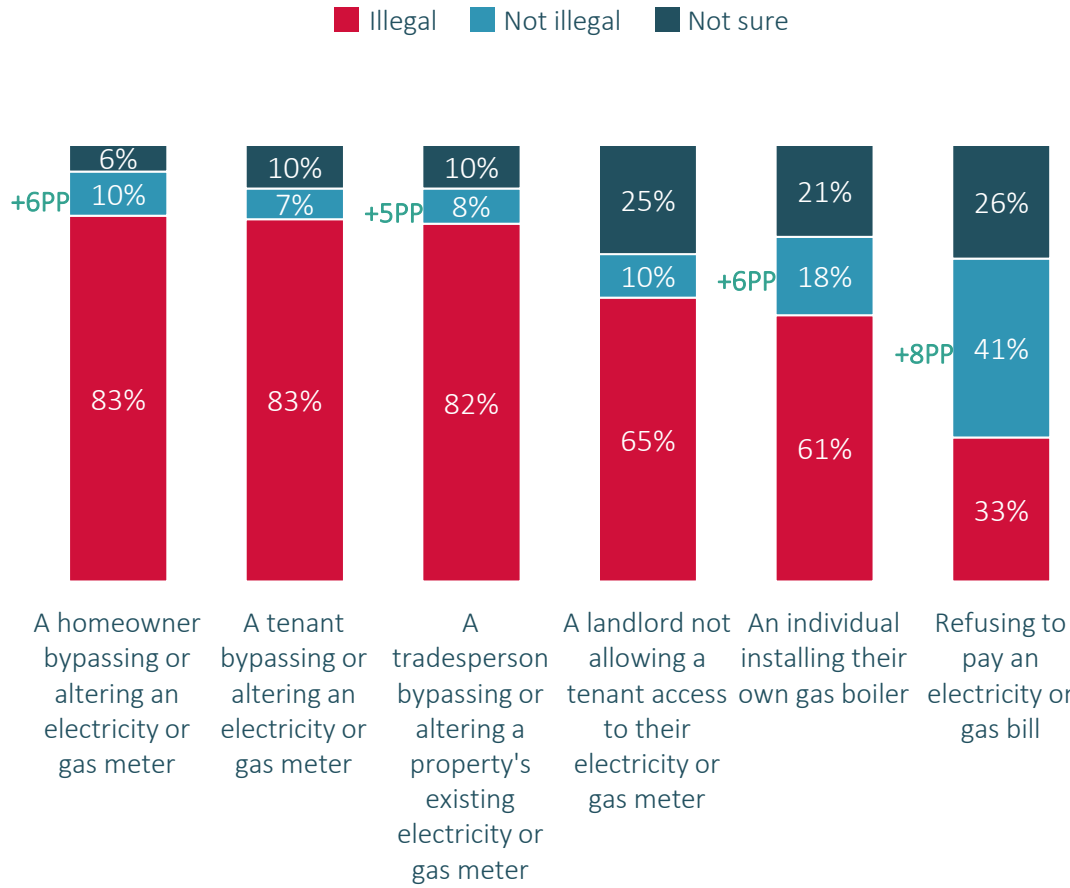
Consider ‘altering meter to reduce bills’ low-level crime

They are more likely to consider most criminal activities ‘low level’ concern, and 4 in 10 believe that refusing to pay a bill is not illegal

Criminality – % – Consider altering meter low level crime



Illegality – % – Consider altering meter low level crime



D1. To what extent do you believe the following behaviours are acceptable or not?/ D2. Which, if any, of the following activities do you consider illegal? / P2. Base: All RECC who think altering their meter to save money on bills is a low-level crime (n=169)

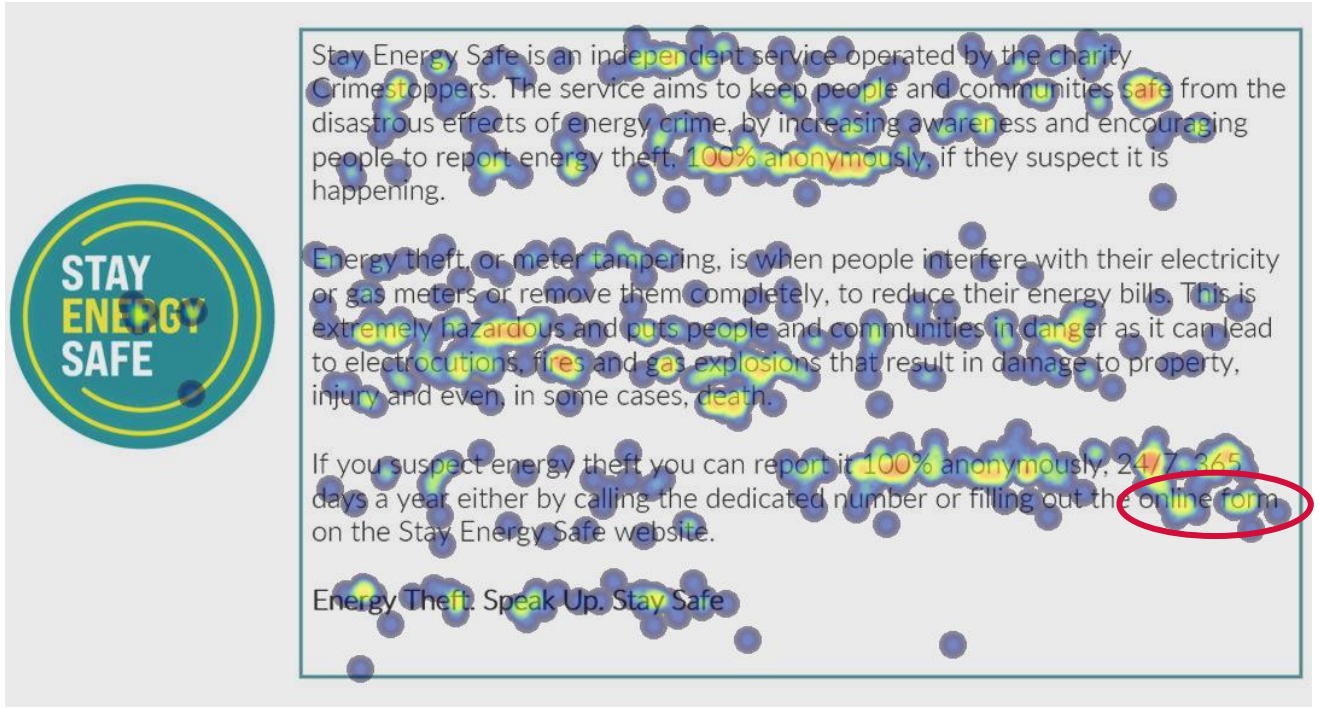
+5PP / -5PP = higher/lower vs total sample

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Consider ‘altering meter to reduce bills’ low-level crime

The anonymity is the message that appears most useful for this group, followed by mentions of ‘safe’ and ‘hazardous’

Most Useful Parts of Proposition – Heat Map - Consider ‘altering meter to reduce bills’ low-level crime



Likelihood to use Stay Energy Safe after seeing the proposition – “Much more likely”

STAY ENERGY SAFE

14% -21PP

F5. Which parts of the description of Stay Energy Safe, if any, did you find most useful? / Base: All those who think altering meter bills is low level crime (n=169)

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Aware of Stay Energy Safe

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Aware of Stay Energy Safe

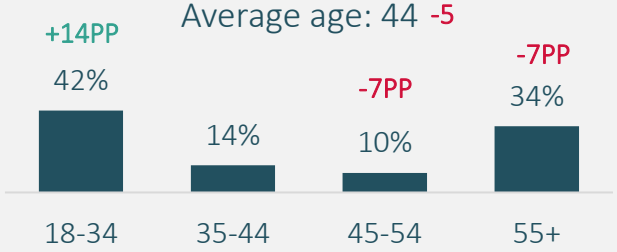
This group are more likely to be younger, affluent males living in urban areas such as London. They are more likely to have children and already installed a range of home improvements.



This group is defined by all those who said **'yes', they are aware of Stay Energy Safe** at question A1.

Age

Average age: 44 -5



Gender



Kids in HH



+5PP

37%

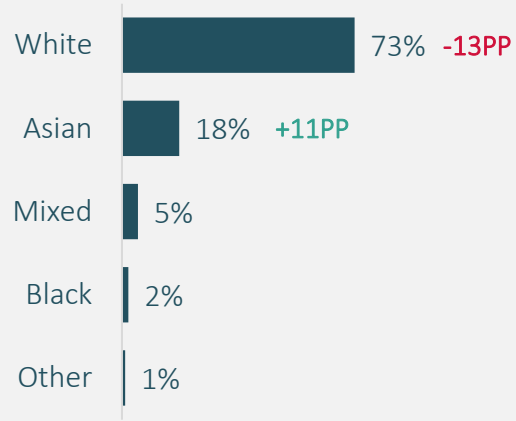
Media consumption

- More likely to use **all types of media touchpoints** including social media, TV, podcasts, newspapers
- More likely to use **all forms of social media** apart from Facebook, with **YouTube** being the most popular
- More likely to listen to a **range of different radio stations** and read from a **range of different newspapers**.

Where do they live?

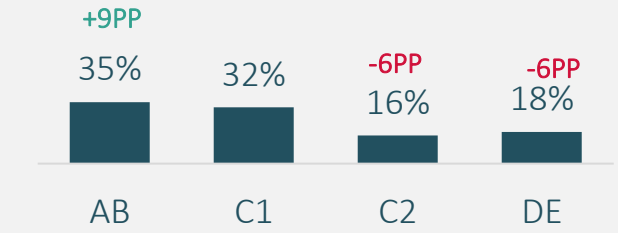
- More likely to live in a **flat or apartment** (25% vs 19%)
- More likely to have **already installed a smart thermostat or radiator valves** (45% vs 37%)
- More likely to live in **Urban areas** (48% vs 40%), such as **London** (23% vs 11%)

Ethnicity



SEG

Avg HH income: £40,173



All those aware of Stay Energy Safe (n=110)

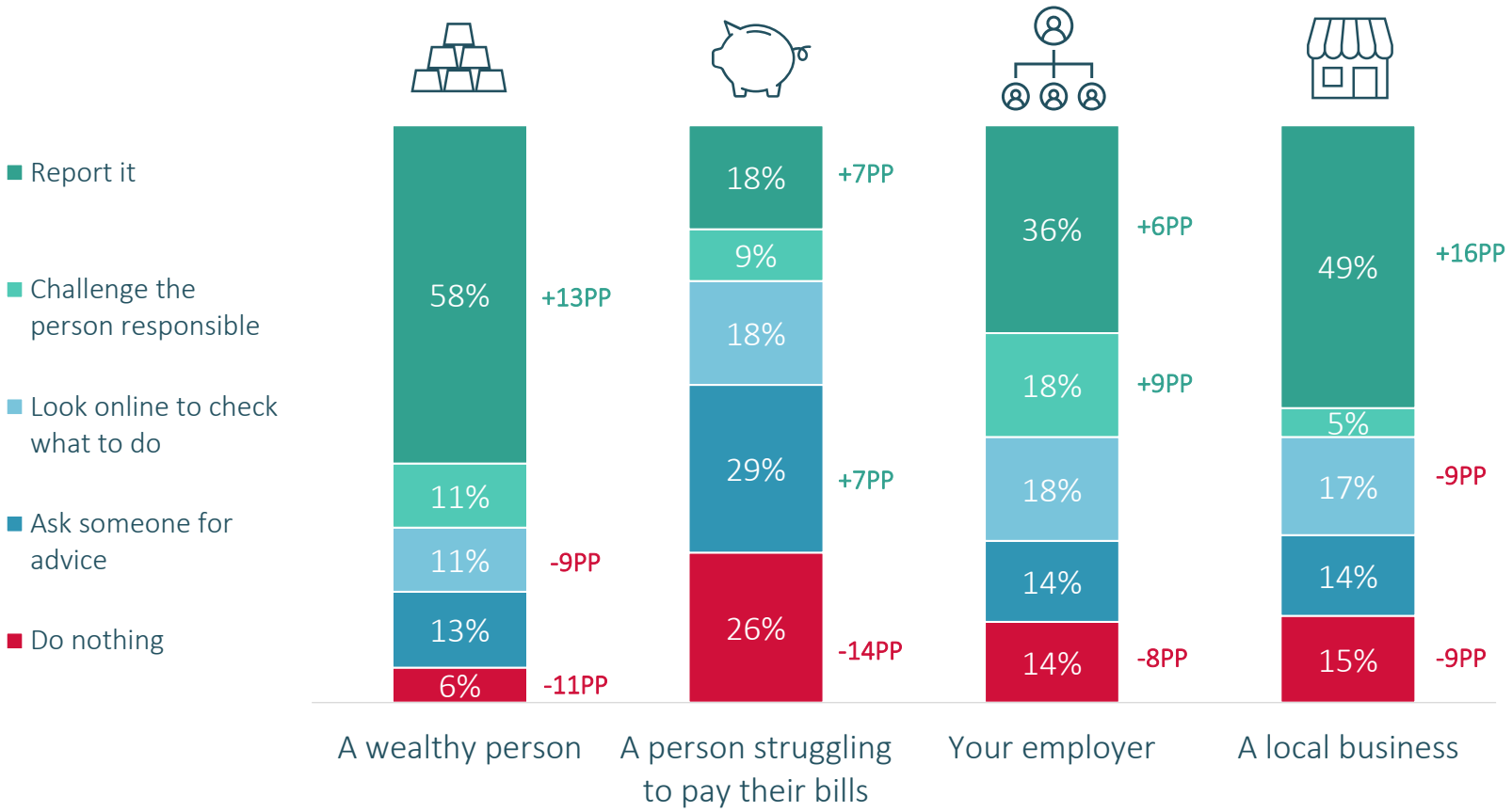
+5PP / -5PP = higher/lower vs total sample

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Aware of Stay Energy Safe

These people are more likely to report in all situations, particularly if it was a wealthy person or local business

Scenario testing – How would react – All aware of Stay Energy Safe



Nets:	
Would report in ALL scenarios	+8PP 18%
Would NOT report in ALL scenarios	-16PP 32%
Would do nothing in ALL scenarios	-10PP 4%

E4. We are now going to ask you about some hypothetical scenarios. What would you do if you [redacted] (Base: All aware of Stay Energy Safe (n=140))

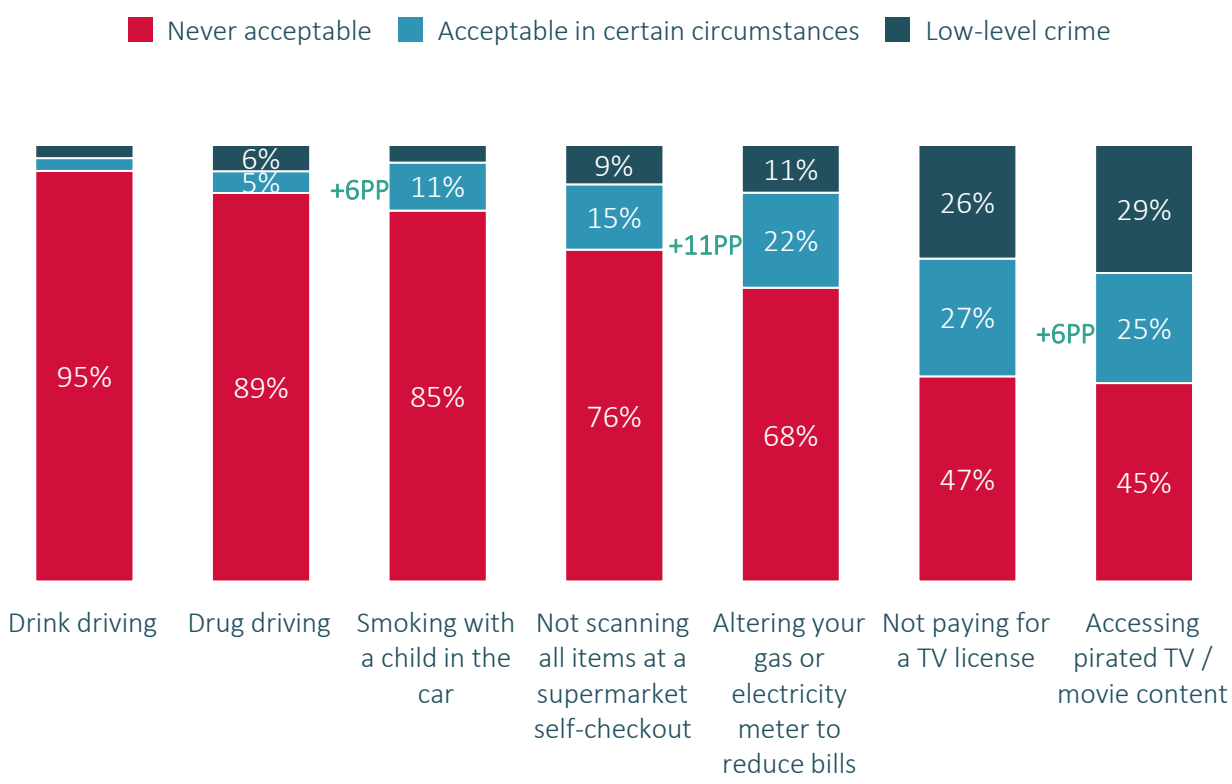
+5PP / -5PP = higher/lower vs total sample

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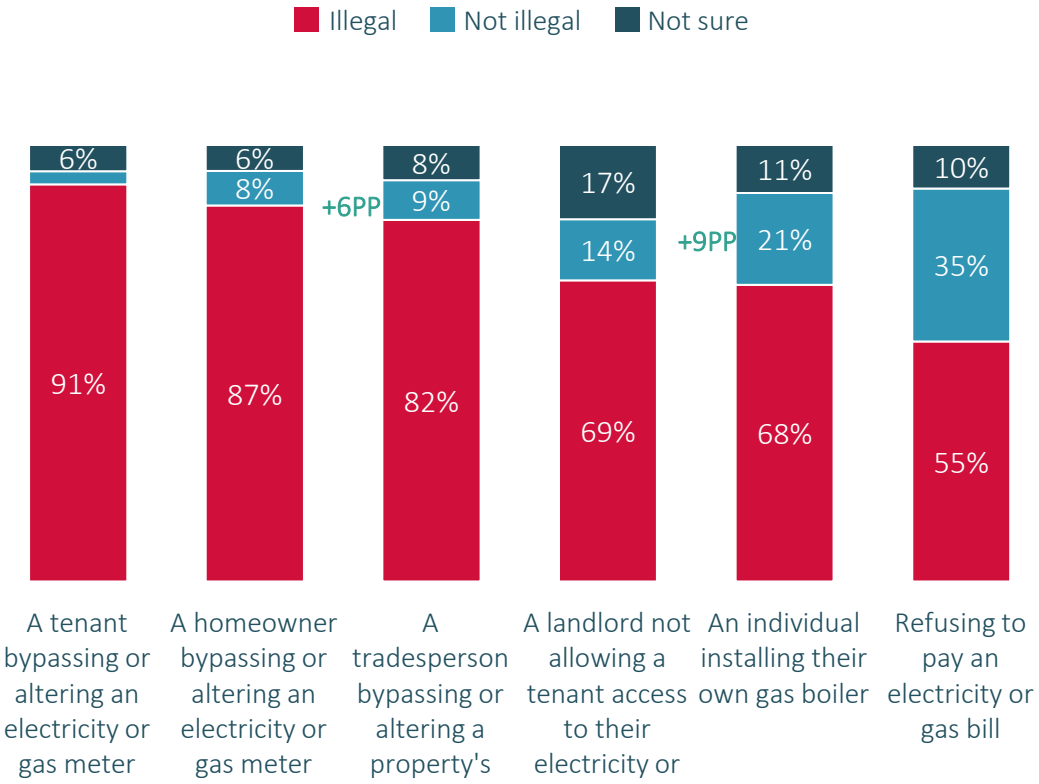
Aware of Stay Energy Safe

They are more likely than the total sample to consider altering your meter acceptable in certain circumstances, especially when it is done by a tradesperson

Criminality – % – All aware of Stay Energy Safe



Illegality – % – All aware of Stay Energy Safe



D1. To what extent do you believe the following behaviours are acceptable or not?/
D2. Which, if any, of the following activities do you think are illegal or not ?
Base: All those aware of Stay Energy Safe (n=110)

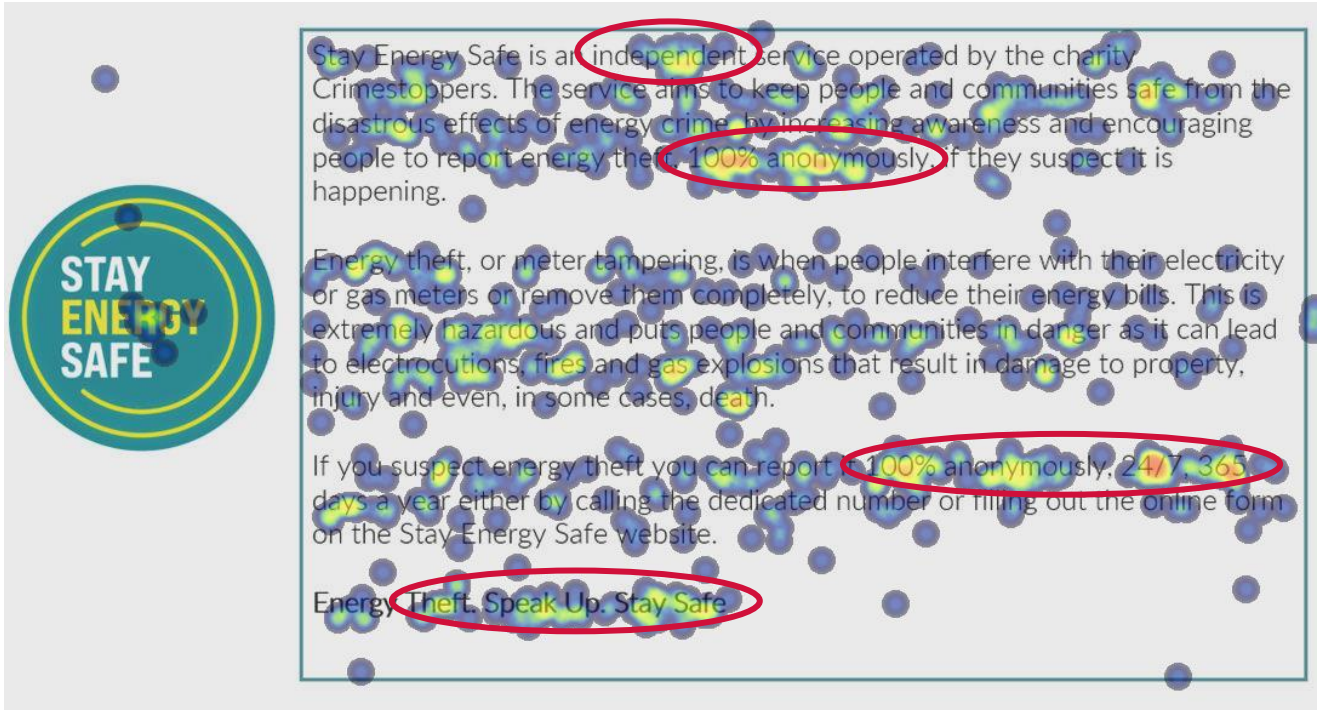
+5PP / -5PP = higher/lower vs total sample

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Aware of Stay Energy Safe

Like most other groups, the anonymity message is the most useful part for this group, as well as the fact that Stay Energy Safe is independent. The 'slogan' also resonates well.

Most Useful Parts of Proposition – Heat Map - Aware of Stay Energy Safe



Likelihood to use Stay Energy Safe after seeing the proposition – "Much more likely"

39%

All those aware of Stay Energy Safe (n=110)

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Would definitely report energy theft

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Would definitely report energy theft

Those who claim they would report in all scenarios are more likely to be male and own their home outright. They are more likely to read the Daily Mail and listen to BBC Radio.

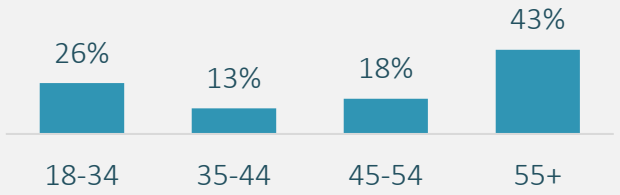


This group is defined by all those who said **'yes',** they **would report all 4** types of people / organisations **if they suspected they were stealing energy.**
This includes:

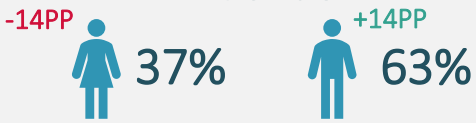
1. A wealthy person
2. A person struggling to pay their energy bills
3. Your employer
4. A local business

Age

Average age: 51



Gender



Awareness

+6PP **14%** Aware of Stay Energy Safe

Kids in HH



36%

Media consumption

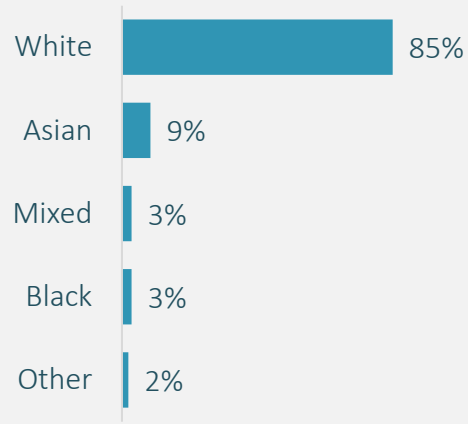
- More likely to **use Facebook** at least weekly (84% vs 78%)
- Less likely to use **Instagram** at least weekly (42% vs 47%)
- More likely to read the **Daily Mail** at least monthly (38% vs 32%) and listen to **BBC Radio** (51% vs 43%)

Where do they live?

- More likely to **own home outright** (42% vs 33%)
- Less likely to live in a **flat or apartment** (12% vs 19%)

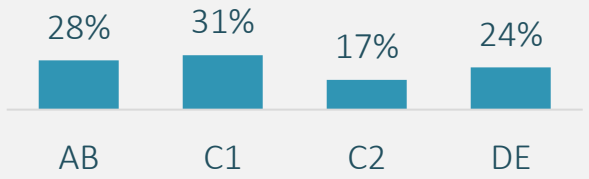


Ethnicity



SEG

Avg HH income: £36,895



All who would report ALL 4 scenarios (n=144)

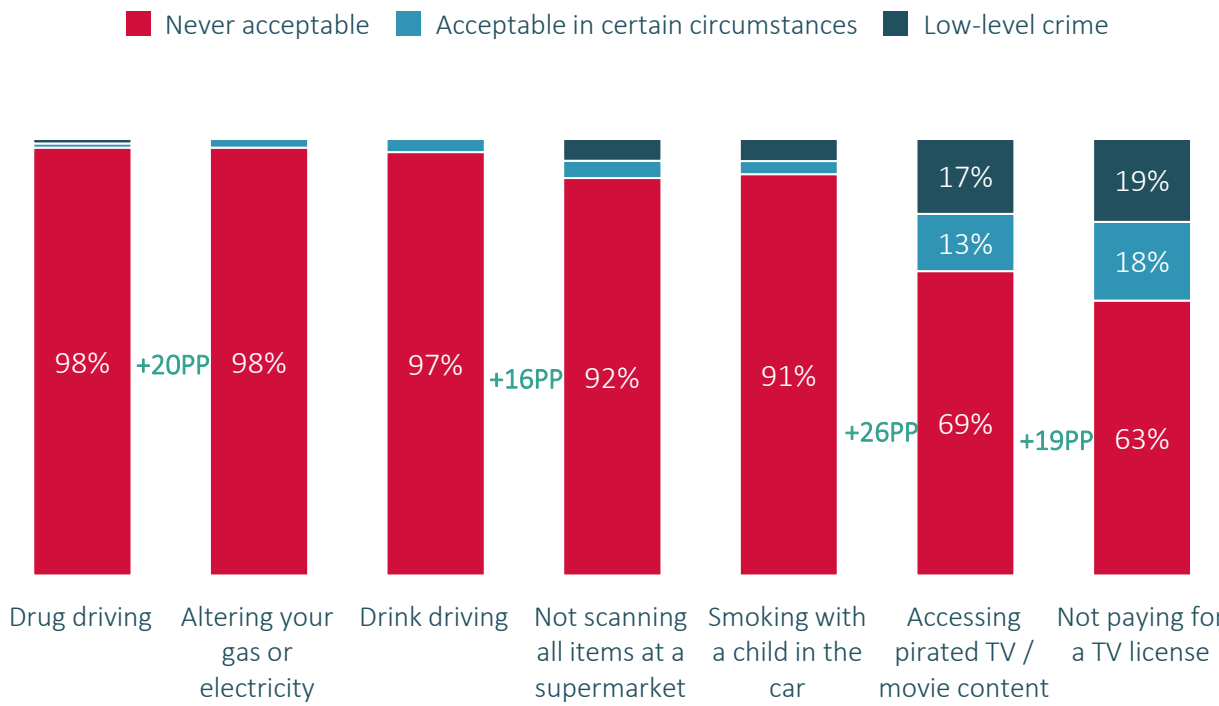
+5PP / -5PP = higher/lower vs total sample

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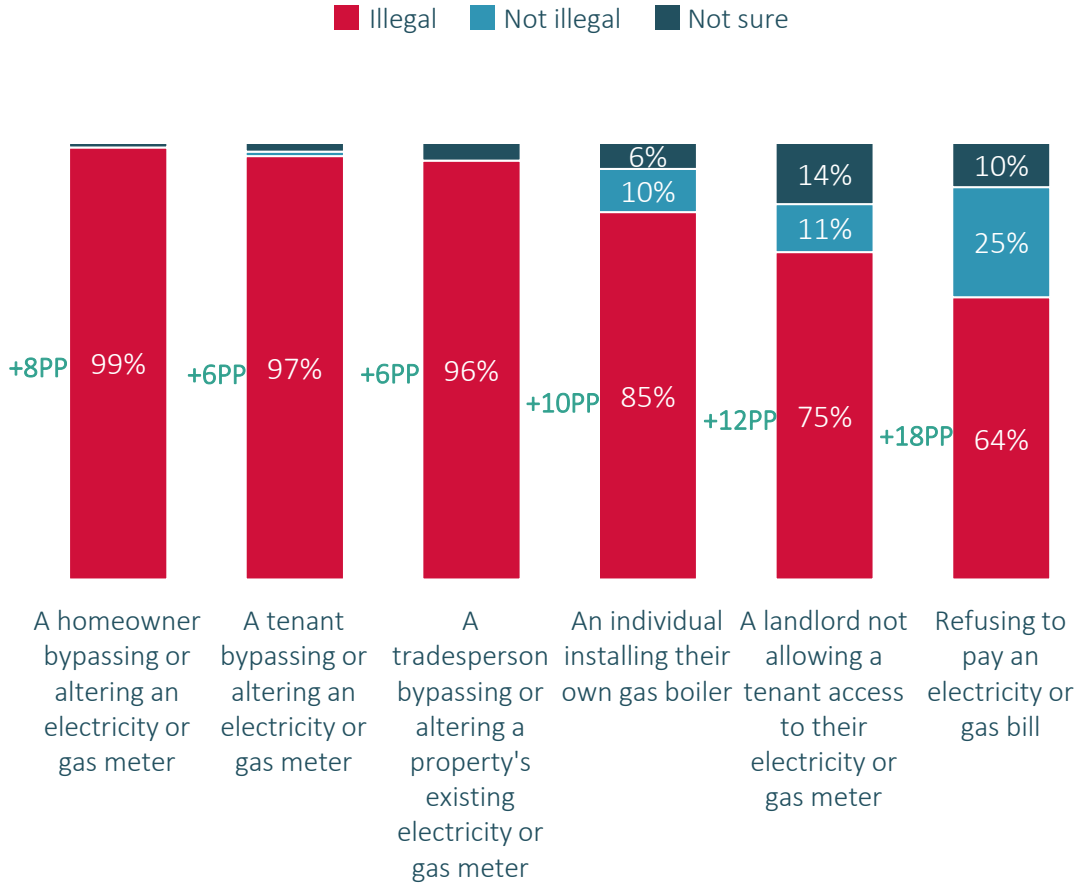
Would definitely report energy theft

This group is more likely to find altering your meter never acceptable. They are also more likely to think each activity is illegal

Criminality – % – Would definitely report energy theft



Illegality – % – Would definitely report energy theft



D1. To what extent do you believe the following behaviours are acceptable or not?/
D2. Which, if any, of the following activities do you think are illegal or not ?
Base: All who would report ALL 4 scenarios (n=144)

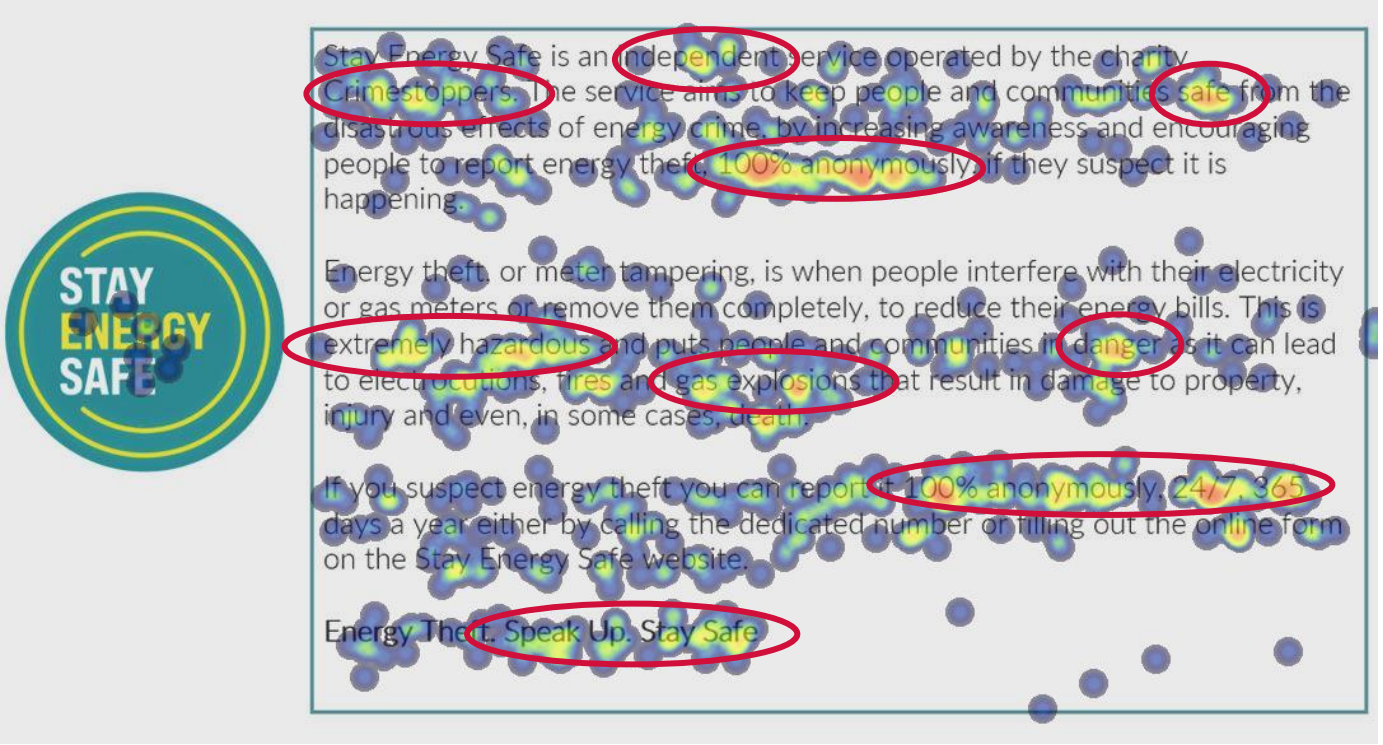
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Would definitely report energy theft

For this group as well, being ‘anonymous’ is perceived as the most useful. Messages around being independent, safe, hazardous, gas explosion and danger are also key.

Most Useful Parts of Proposition – Heat Map - Would definitely report energy theft



Likelihood to use Stay Energy Safe after seeing the proposition – “Much more likely”

46% +11PP

EE1 Which parts of this description of Stay Energy Safe if any did you find most useful?
All who would report All 4 scenarios (n=144)

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Non-reporters that you could persuade

Non-reporters that you could persuade

They are more likely to be affluent females who own their own homes. They use Facebook and YouTube particularly more than the rest of the UK population.

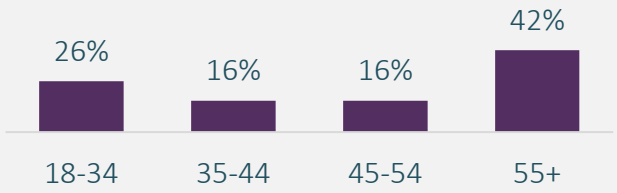
Double check gender %

This group is classified by all those who said they would **not report Energy Theft in all 4 scenarios** (a wealthy person, a person struggling to pay their bills, their employer & a local business).

However, after **seeing** the Stay Energy Safe **proposition** description, they said they would be **likely to report Energy Theft** if they came across it.

Age

Average age: 50



Gender


+8PP 59%


-8PP 40%

Awareness

6% Aware of Stay Energy Safe

Kids in HH



30%

Media consumption

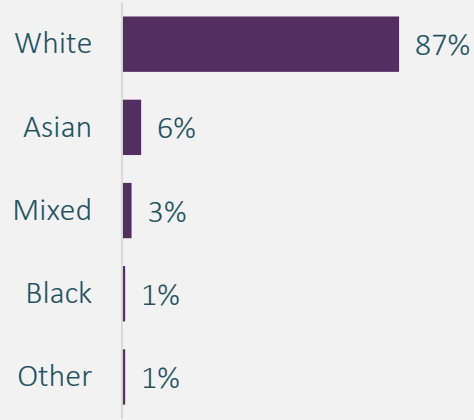
- More likely to read **online newspapers / magazines** weekly (63% vs 56%)
- Most likely to use :

Where do they live?

- More likely to **own their own home** (65% vs 60%)
- More likely to have already installed a **Smart thermostat or radiator valves** (42% vs 37%)

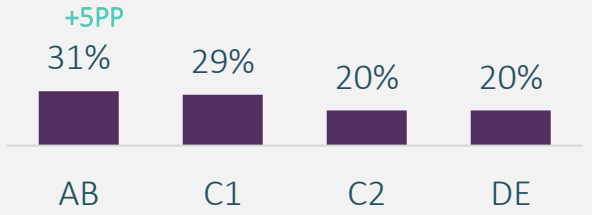


Ethnicity



SEG

Avg HH income: £39,169



All Non-reporters that you could persuade (n=476)

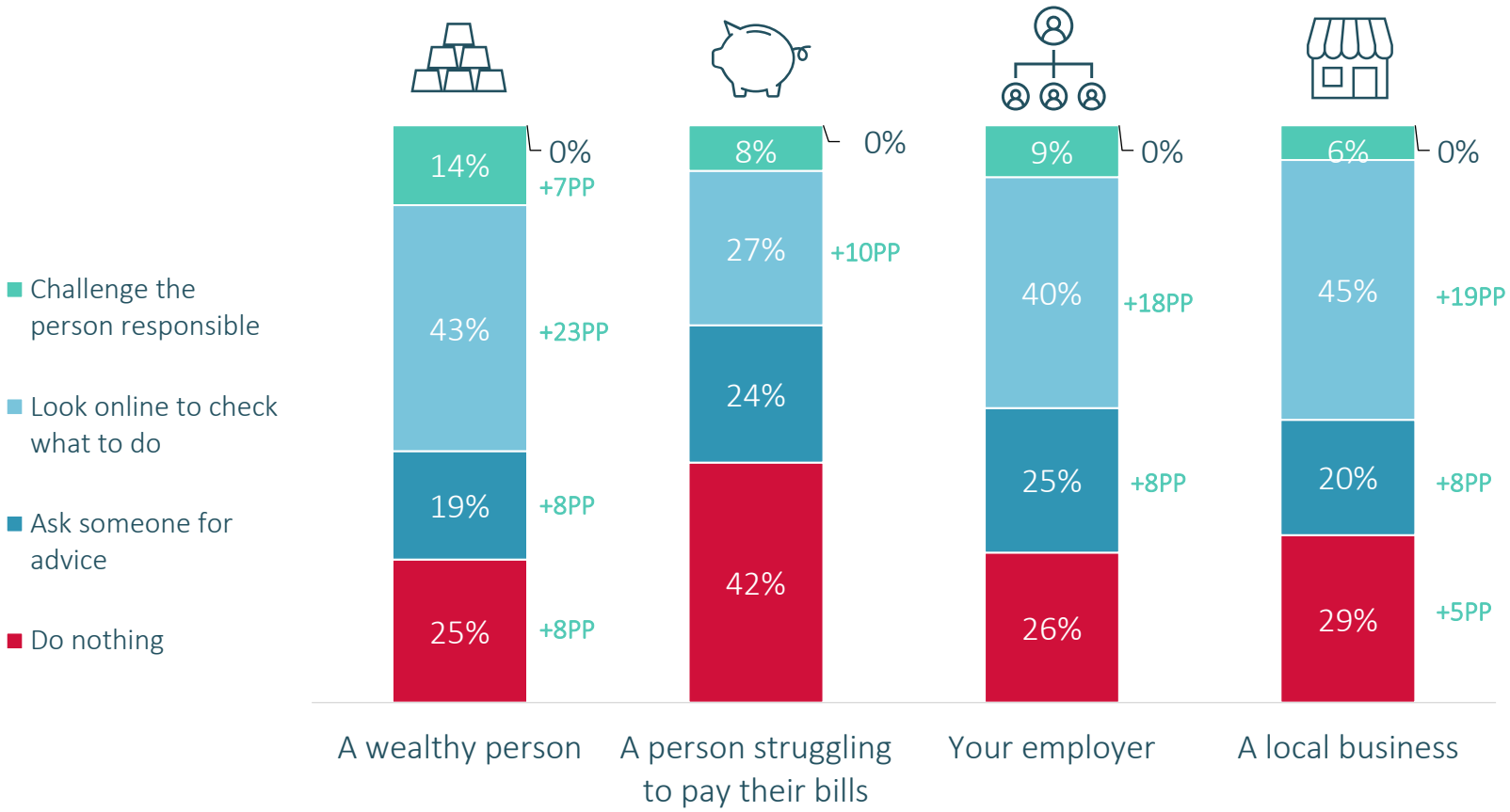
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Non-reporters that you could persuade

This group are more likely to do indirect actions, like looking online to check what to do. They are also more likely to ask someone for advice if a wealthy person, employer or local business were stealing energy.

Scenario testing – How would react – Non-reporters that you could persuade



Nets:	
Would report in ALL scenarios	-10PP 0%
Would NOT report in ALL scenarios	-48PP 100%
Would do nothing in ALL scenarios	+6PP 20%

E4. We are now going to ask you about some hypothetical scenarios. What would you do if you [redacted] [redacted] [redacted]
Base: All Non-reporters that you could persuade (n=476)

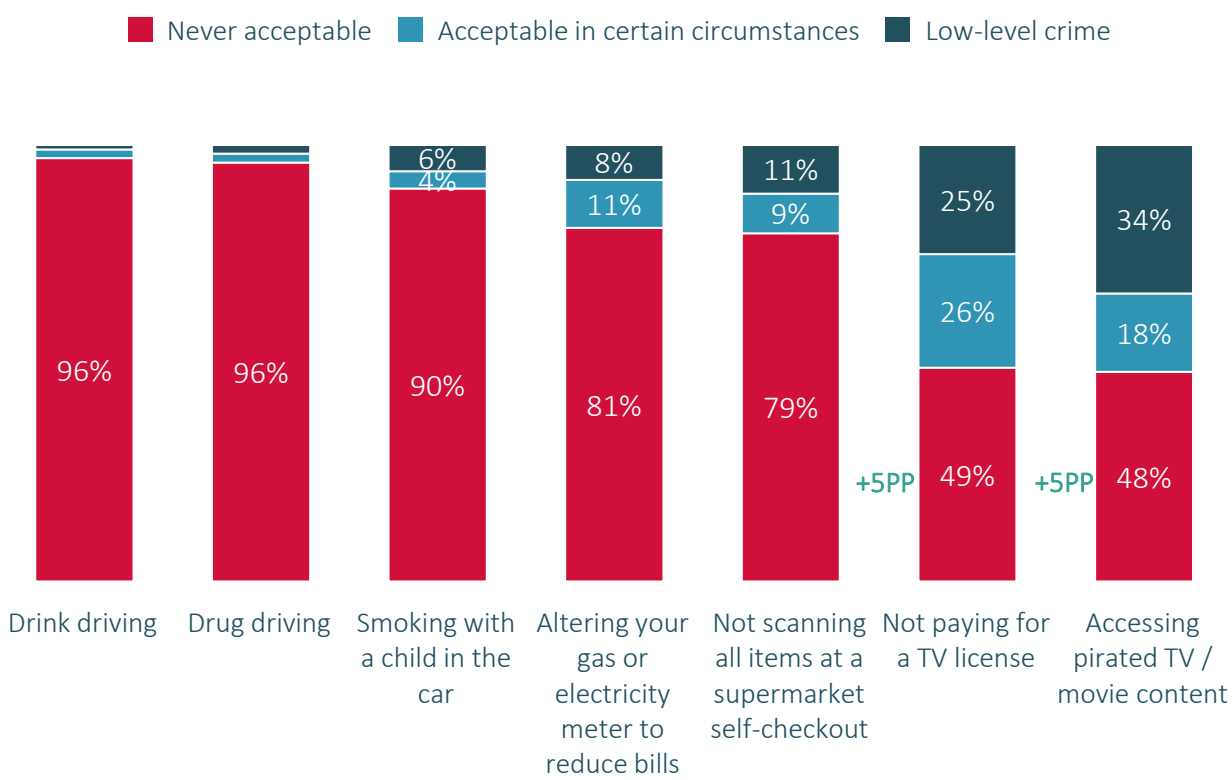
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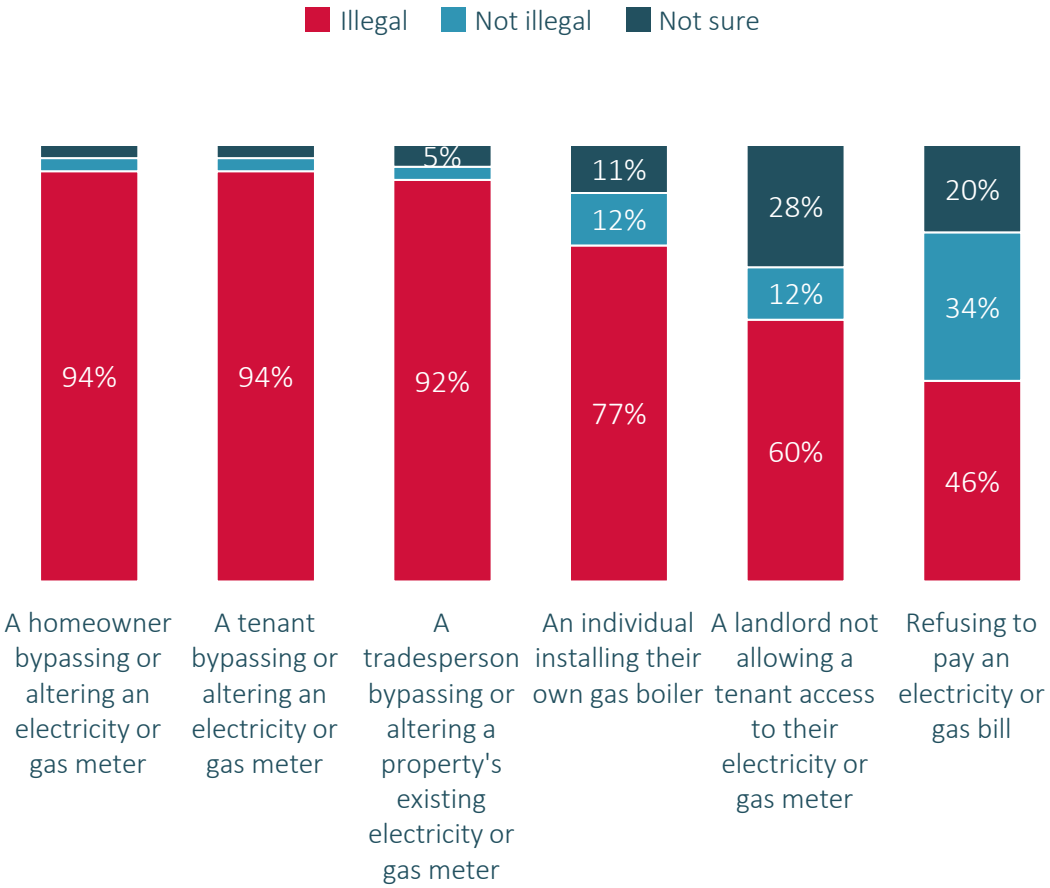
Non-reporters that you could persuade

Non-report that you could persuade are less relaxed than the rest of the sample around accessing pirated content and not paying for a TV license, with half believing they are never acceptable

Criminality – % – Non-reporters that you could persuade



Illegality – % – Non-reporters that you could persuade



D1. To what extent do you believe the following behaviours are acceptable or not?/
D2. Which, if any, of the following activities do you think are illegal or not ? / Base: All Non-reporters that you could persuade (n=476)

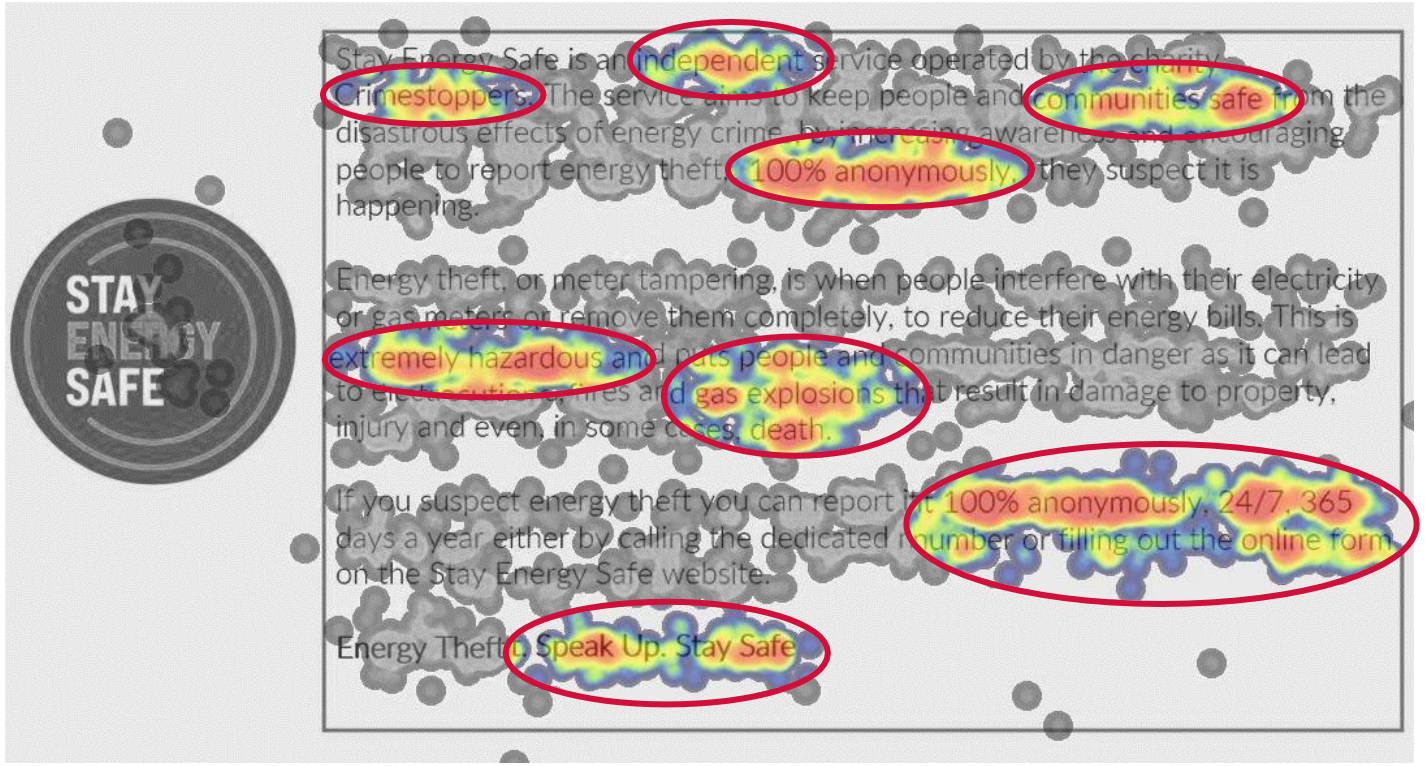
+5PP / -5PP = higher/lower vs total sample

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Non-reporters that you could persuade

Like the other groups, anonymity is a key message, as well as clear mentions of dangers such as 'gas exposition'. The emphasis on communities is also seen as useful, as well as the ability to use an online form.

Most Useful Parts of Proposition – Heat Map - Non-reporters that you could persuade



All Non-reporters that you could persuade (n=476)

Likelihood to use Stay Energy Safe after seeing the proposition – "Much more likely"

STAY ENERGY SAFE **46%** +11PP

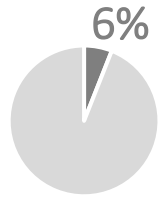
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Would do nothing but could be persuaded

Would do nothing but could be persuaded

These people are more likely to be younger, white women living in suburban environments such as in the North-West. They are more likely to own their own home with a mortgage and use Instagram.

% of UK population

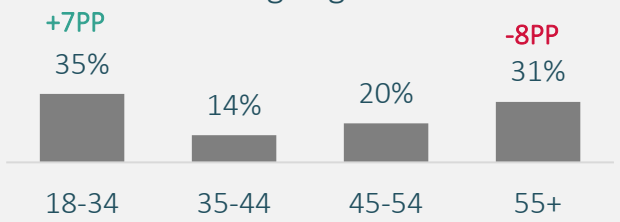


This group is classified by all those who said they would do nothing in all 4 scenarios of energy theft (a wealthy person, a person struggling to pay their bills, their employer & a local business)

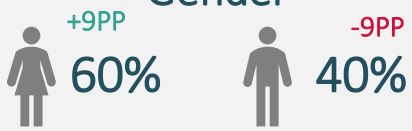
However, after seeing the Stay Energy Safe proposition description, they said they would be likely to report Energy Theft if they came across it.

Age

Average age: 45



Gender



Awareness

-5PP

3% Aware of Stay Energy Safe

Kids in HH



35%

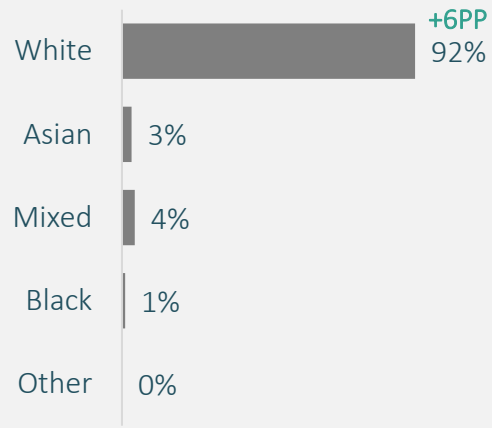
Media consumption

- Watch **TV on demand / catch up** at least weekly (90% vs 74%)
- Read **online newspapers / magazines** at least weekly (64% vs 56%)
- More likely to use the following social media:

Where do they live?

- More likely to own their **own home with a mortgage** (33% vs 27%)
- More likely to live in a **semi-detached house** (40% vs 34%)
- More likely to live in **suburban environments** (45% vs 40%)
- More likely to live in the **North West** (21% vs 11%) and less likely to live in the **South East** (8% vs 14%)

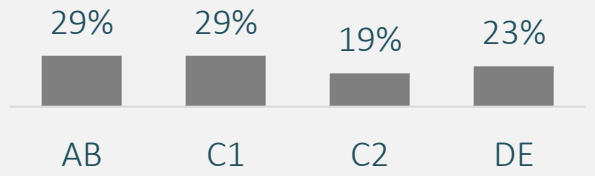
Ethnicity



SEG

+6PP

Avg HH income: £43,143



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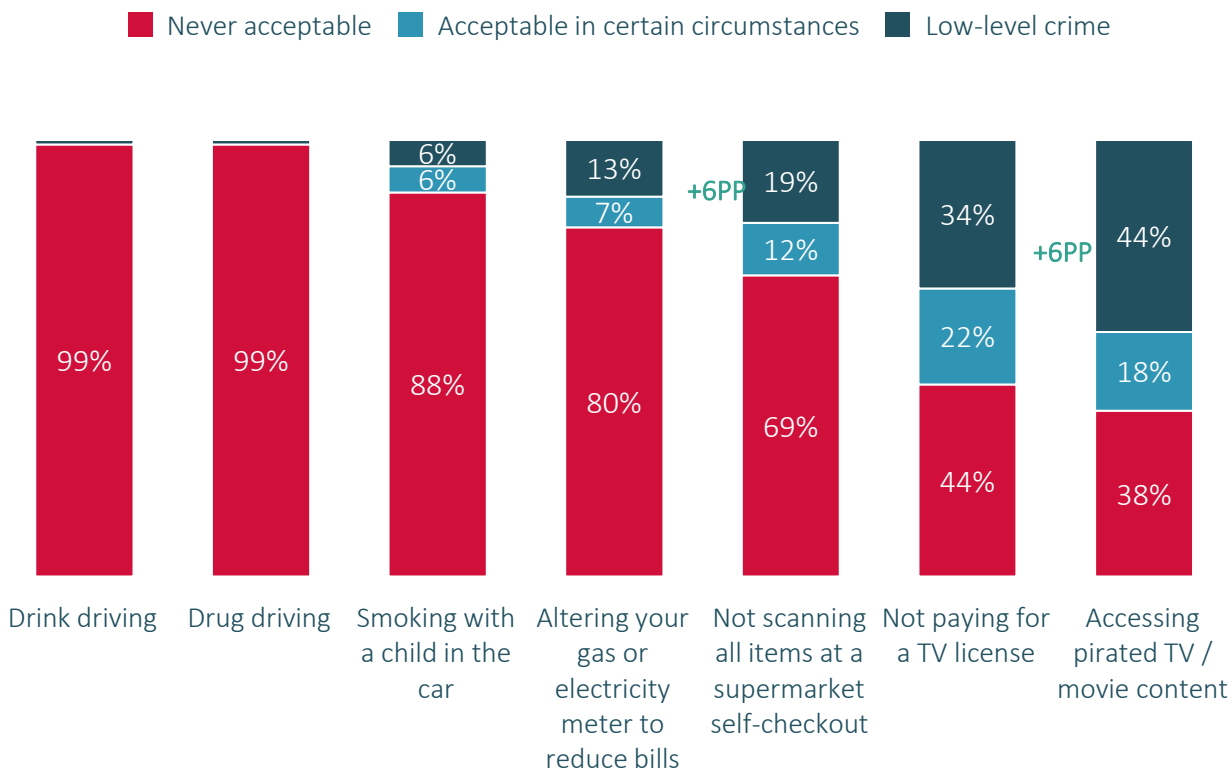
All those who do nothing but could be persuaded (n=96)

+5PP / -5PP = higher/lower vs total sample

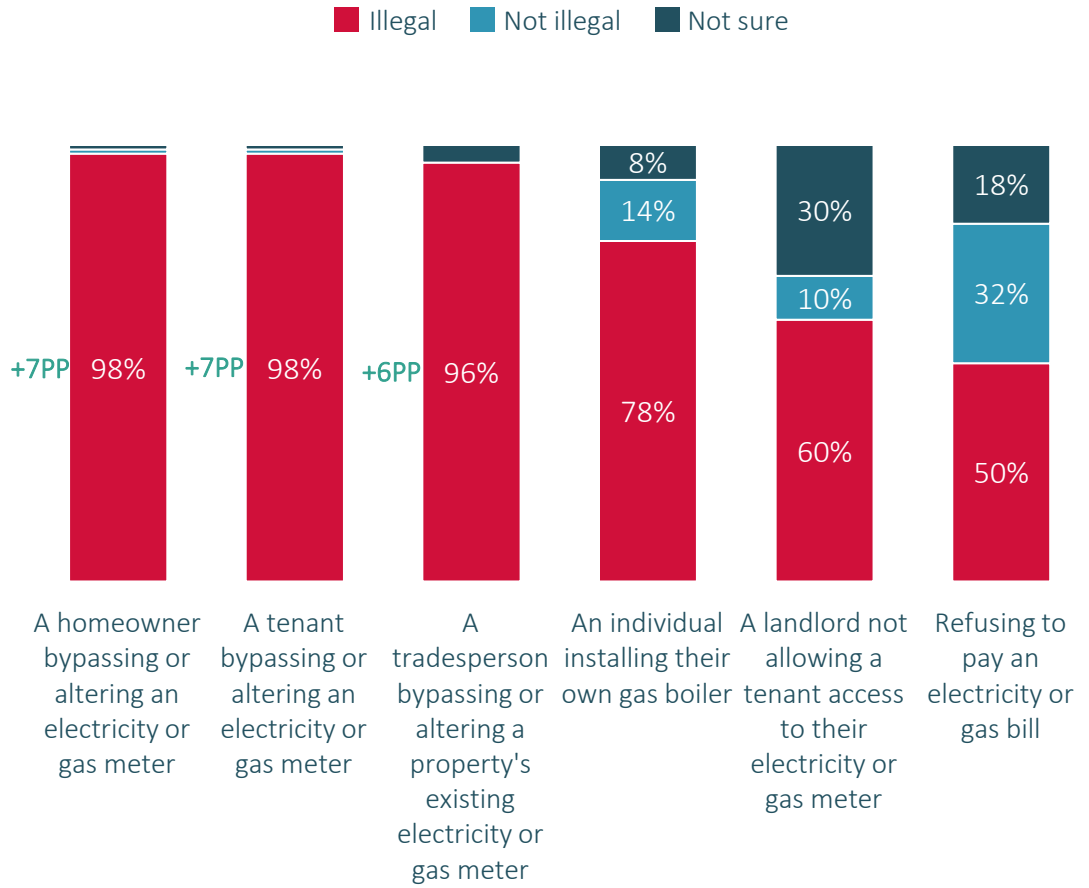
Would do nothing but could be persuaded

This group are more likely to consider accessing pirated content and not scanning all items at the supermarket a low-level crime, but they find altering a meter more illegal than the rest of the population.

Criminality – % – Would do nothing but could be persuaded



Illegality – % – Would do nothing but could be persuaded



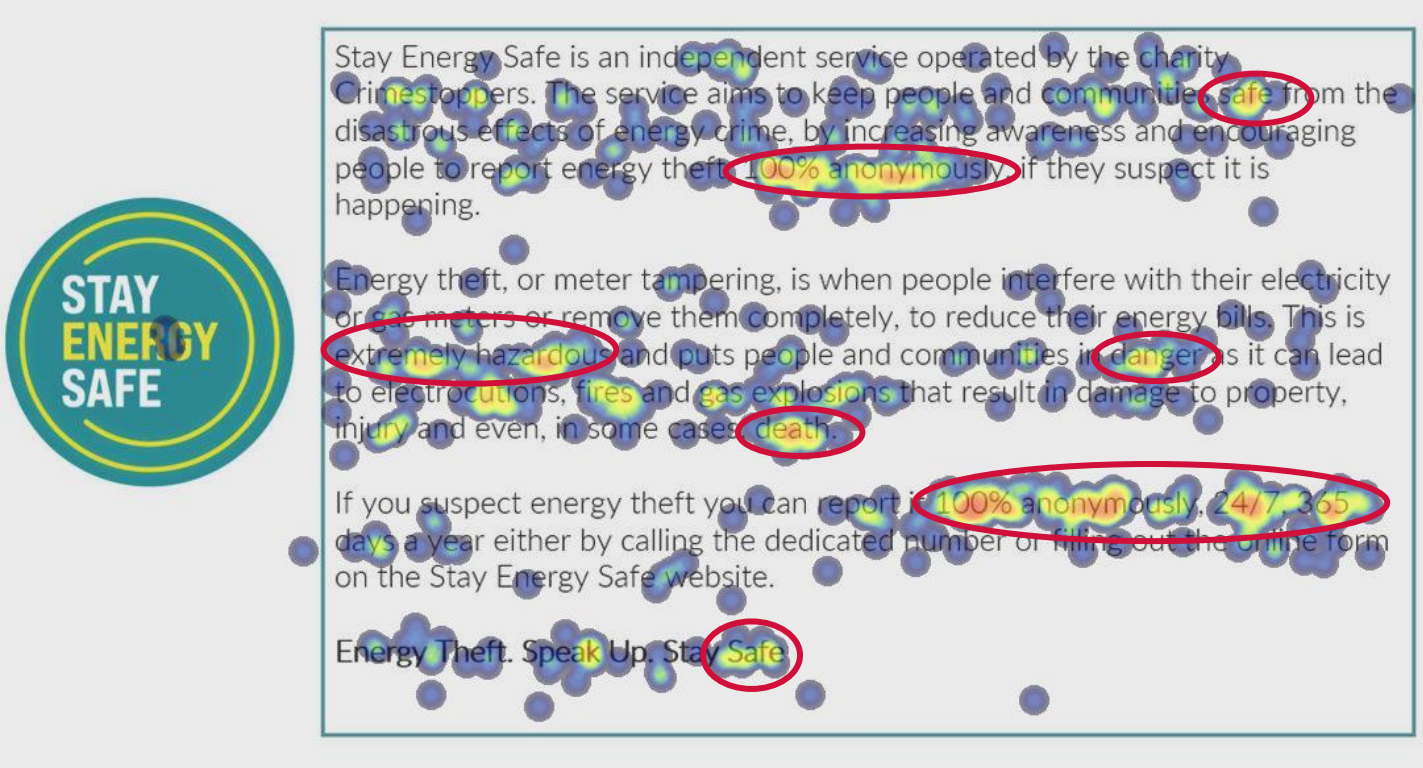
D1. To what extent do you believe the following behaviours are acceptable or not?/
D2. Which, if any, of the following activities do you think are illegal or not ? / Base: All [illegible] +5PP / -5PP = higher/lower vs total sample
Those who do nothing but could be persuaded (n=96)

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Would do nothing but could be persuaded

Mentions of anonymity and dangers associated with meter tampering are perceived as the most useful for this group, who is also sensitive to the word ‘safe’.

Most Useful Parts of Proposition – Heat Map - Would do nothing but could be persuaded



All those who do nothing but could be persuaded (n=96)

Likelihood to use Stay Energy Safe after seeing the proposition – “Much more likely”

25% -10PP

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7

Summary and recommendations

Summary & recommendations – Messaging

	Key findings	What does it mean for Stay Energy Safe?	
1	Stay Energy Safe's **mission** resonates well with most people once they understand what the dangers are	• Important to educate people on the dangers	
2	Unanimity around the importance of being **100% anonymous**	• The anonymity and convenience to report should be central in any future comms (particularly important for younger groups and those who were initially less likely to report)	
3	The **convenience** of reporting with Stay Energy Safe is also key: 24/7, 365 days a year, through an online form		
4	Most groups also find **clear mentions of the dangers associated with meter tampering** important	• Make sure people understand the dangers, but remember that sensationalism lacks credibility (qual finding from 2022) • Make sure Stay Energy Safe's role is clear	
5	The reassurance around the **safety** provided by Stay Energy Safe is also key and 'Speak up. Stay safe' resonates well		
6	'**Community**' works well with **Firsthand Experience of energy theft** & **Consider 'altering meter to reduce bills' low-level crime**	• Emphasize this message for these groups • Showing that energy theft can potentially affect a whole community, rather than just one household	
7	**Illegal nature of energy theft** particularly important for **Would definitely report energy theft**	• Emphasize this message for this group	
8	**Stories from those who have experienced energy theft directly** to help personify its effects and create an emotional connection	• Helps increase resonance and encourage reporting	
9	People need to be educated on the **signs of energy theft**	• Explain signs clearly so people can recognize energy theft	

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Summary & recommendations – Targeting

	Key findings	What does it mean for Stay Energy Safe?
 10%	1 **Firsthand Experience of energy theft** • More likely to be living in a rented flat in urban areas such as London • More likely to read newspapers and use Twitter • Less likely to report overall, and lower understanding of what is illegal or not	This group is crucial for you as it is made up of people who have already been confronted with energy theft, but who are also less likely to report it. How to reach them: ○ Target urban areas and big cities with comms for e.g. OOH, local printed newspapers ○ Partner with local councils in big cities
 11%	2 **Consider 'altering meter to reduce bills' low-level crime** • More likely to be 18-34 • More likely to live in a rented flat • More likely to use social media platforms, listen to podcasts and watch online videos • Most likely to do nothing in all 4 scenarios • More likely to consider most criminal activities 'low level' concern	This group is also very important as it is particularly made of younger renters, likely to come across energy theft. Their young age suggests that this will pose a challenge in the future if we cannot successfully reach them. How to reach them: ○ Target 'younger' social media platforms such as TikTok, Instagram, YouTube or Twitter/X ○ Importance of podcasts to keep in mind for e.g. advertising

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Summary & recommendations – Targeting

	Key findings	What does it mean for Stay Energy Safe?
 8%	3 **Aware of Stay Energy Safe** • More likely to be younger men • More likely to be affluent • More likely to live in urban areas • More likely to have children • More likely to report in all situations • More likely to consider altering your meter acceptable in certain circumstances	This group is already quite knowledgeable about the issue as they are aware of you and are more likely to report energy theft. How to reach them: ○ Target 'younger' social media platforms such as TikTok, Instagram, YouTube or Twitter/X ○ Target urban areas and big cities with comms for e.g. OOH, local printed newspapers ○ Keep in mind they're more likely to be families
 10%	4 **Would definitely report energy theft** • More likely to be men • More likely to own their home outright • More likely to read the Daily Mail and listen to BBC Radio • More likely to find most criminal activities 'never acceptable' and to consider things 'illegal'	This group is already 'rallied' to your cause as they would report every situation. How to reach them and maintain engagement: ○ Target 'older' media such as printed newspapers, linear TV, radio or Facebook

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Summary & recommendations – Targeting

	Key findings	What does it mean for Stay Energy Safe?
 32% 5	**Non-reporters that you could persuade** • More likely to be affluent women • More likely to own their own homes • More likely to use Facebook and YouTube • More likely to do indirect actions • Less likely to consider accessing pirated content and not paying for a TV license low-level crimes	This group would already do indirect action, but the main challenge is to turn them into people who would report energy theft. How to reach them: ○ Target media such as Facebook, Instagram or YouTube ○ Make sure they can find information easily on your website for e.g. what to do in case you suspect someone of energy theft
 6% 6	**Would do nothing but could be persuaded** • More likely to be younger • More likely to be white women • More likely to be living in suburban areas • More likely to own their own home • More likely to use Instagram • More likely to consider accessing pirated content and not scanning all items at the supermarket a low-level crime • But more likely to find altering a meter illegal	This group is further remote from you as they would do nothing in all situations. However, when educated more on the matter, they could change their minds – once again emphasizing the importance of education How to reach them: ○ Target 'younger' social media platforms such as TikTok, Instagram, YouTube or Twitter/X ○ Make sure they can find information easily on your website as it might take from them from 'do nothing' to 'indirect action'

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Summary & recommendations – What to prioritize?

Women

Are less likely to report, unless they really understand the dangers linked to energy theft = proves the importance of education

Urban areas

Are more at risk, and where groups who don't realize the dangers of energy theft are more likely to live



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THANK YOU

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