



moving minds

Unlocking the spending power
of home movers

Introduction.

When people move home, they spend money

Every year, around 11% of the UK's adult population move to a new home*. And it's an 'inertia-buster' that changes our spending behaviours dramatically. In the first 12 months after moving, we spend roughly the same on home improvements as we do in the five years that follow.

This equates to thousands spent by each mover on home improvements and move-related purchases in the year after moving. Indeed, around £16bn of UK consumer spend each year is attributed to people moving home*.

A huge opportunity for brands

This massive increase in consumers' propensity to spend represents a huge opportunity for brands seeking greater return on their marketing budgets.

Understanding why people move is the key to unlocking their spending potential

Home movers have proven a fertile group to target for some time, and demographic segmentation has helped us reach broad groups of them in an accurate, timely, and rational way.

But demographic and lifestyle data only tell us half the story about purchase preference, which we felt left a piece missing from the puzzle.

We decided to look again at what we understand about home movers, looking at why they move. If we could understand the motivation behind their move, we'd be able to build a more detailed picture of what drives their decision making.

What this means for brands

With a deeper knowledge of what's behind their decisions, we can understand more about the purchase choices they make at this time of greater readiness to spend, and therefore develop marketing communications that resonate emotionally, authentically and effectively.

Moving Minds

The result is Moving Minds, a groundbreaking study that groups home movers into tribes according to their move motivations. It explores what these motivations tell us about each tribe's mindset and investigates the behavioural psychology behind how this impacts decision making and purchasing behaviour.

Meet the tribes.

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Professor Richard Crisp, BA (Oxon) PhD (Wales) C. Psychol. FAPS FBPsS FAcSS is Head of the Department of Psychology at Durham University. He is also a Fellow of the Academy of Social Sciences, Fellow of the Association for Psychological Science, and Fellow of the British Psychological Society. Richard's research covers the full range of topics that comprise social psychology, from stereotyping to social influence, from attitudes to attraction. Richard is a noted author on the subject, and has written extensively on social and behavioural science for the trade, national and international press.

Our psychology expert.

Our approach

Working with our research partner, Ragdoll, we undertook detailed research into UK home movers*. We surveyed a nationally representative sample of over 2,000 UK home movers, both buyers and renters, during March and April of 2019.

Ragdoll applied a multi-mode approach to attitudinal segmentation of the collated data, adopting the principles of cluster analysis, but also using tools such as varying variable influence and wider data manipulation.

This approach enabled us to identify eight clear attitudinal segments, each with their own unique motivations for moving.

We then engaged Professor Richard Crisp, Head of the Department of Psychology at Durham University, to examine and interpret the segments – or ‘tribes’ – through the lens of established social psychological theories.

This enabled us to identify and articulate indicative behavioural ‘purchase decision’ profiles for each tribe. These profiles will help marketers to better understand, target, communicate with and ultimately convert prospective customers.

The behavioural profiles were constructed according to where segments fell along two dimensions:

- 1. Thinking Space:** the typical time and cognitive capacity available to tribes when making purchasing decisions.
- 2. Identity Drive:** the extent to which a purchase has potential to demonstrate valued aspects of the tribe’s identity, status or success, as opposed to being more for satisfying (or ‘actualising’) personal goals.

And each dimension was given endpoints anchored from -10 to +10:

- 1. Thinking Space:**
-10 (‘fast’ thinking) to
+10 (‘systematic’ thinking)
- 2. Identity Drive:**
-10 (identity actualisation) to
+10 (identity expression)

The core reference for the psychological theories and approaches discussed in this paper is:

Crisp, R. J. & Turner, R. N. (2014). Essential Social Psychology (3rd Edition). London: SAGE Publications Ltd.



2014

people surveyed

who are moving or have moved home in the last 3 months

32k

words of qualitative data collected

330k

data points generated

63

questions asked



Seekers.

Looking to express their true identity

Seekers are modest earners, mostly living alone, in properties and areas chosen for affordability, rather than because it's where they want to be. The area is an issue for them.

They feel isolated from their peers and this impacts on their self-confidence. So, in moving, they're seeking an area with a community that better reflects them and their values.

This new area, full of people like them, would allow them to better express their true identity and help them feel more confident about the direction their life is going in.

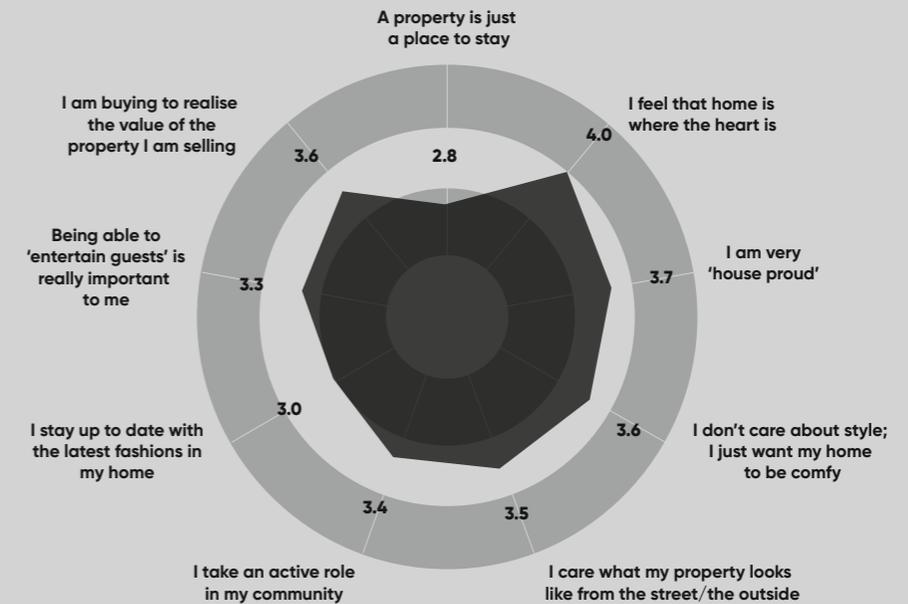
What are their behaviours?

Seekers look to align themselves to groups they instinctively feel best represent their true identity. This means their decisions are often heavily influenced by this need to align with, and be seen to be part of, these groups. They believe 'belonging' will reflect positively on them.

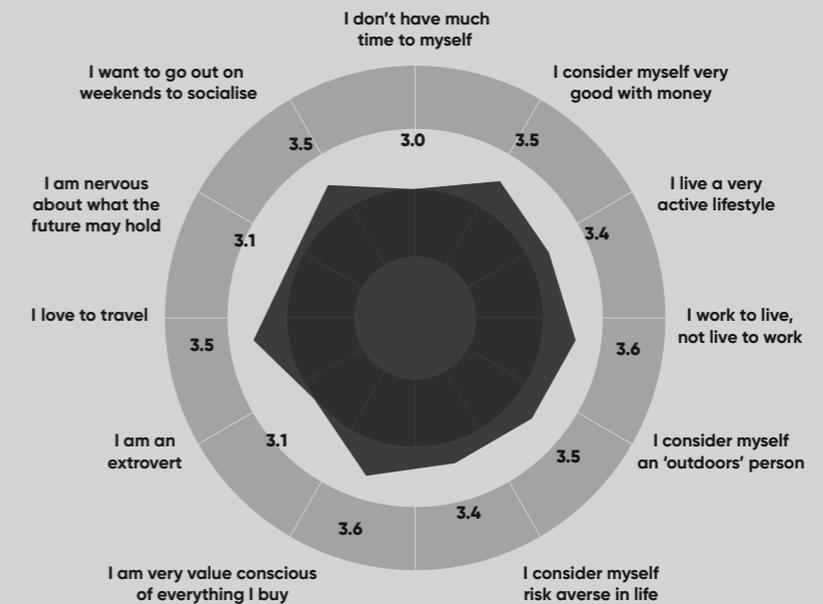
The decisions they make are not about standing out or being seen as better. They are about giving them the belief that they fit in and measure up to their peers. Fundamentally their decisions are about giving them a greater sense of self-worth.



Home lifestyle



General lifestyle



0

Thinking Space

+5

Identity Drive

**"Fresher air,
nicer people,
a nicer place
to be and
feel more safe."**



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"Seekers are not just looking for a new place to live; they're looking to define or redefine their 'social identity'. We all have social identities – affiliations that tell us who we are, like our gender, age, politics and sporting preferences. These identities are important because they're a source of support and self-esteem. Where we live can be one of our most important identities in this respect: a source of support (a safe, neighbourly community) and self-esteem (a better area, somewhere to be proud of).

To affirm valued social identities, people are often keen to express them (just think of all the football shirts you see after a big win). In a direct sense, Seekers should therefore be attracted to goods and services that dress their new home, internally and externally, to maximal effect – within their budgetary constraints.

They will likely be quite house proud. Indirectly, they may be attracted to goods and services, and / or marketing, that supports that broader sense of a new beginning – and be willing to spend a little bit extra to move on up.

In sum, Seekers will likely be interested in expressing their newly acquired identity, with thinking space probably exerting no particular pull."



Nurturers.

Need to act, but no time to think

Nurturers have young families and as a result their primary focus is on providing the best upbringing possible for their children.

For them, the home is a critical part of ensuring their family is happy and contented, so they need a home with enough space for their family to develop and grow.

However, their absolute focus on family places a huge draw on their own time, energy and income, meaning they have little quality time to themselves.

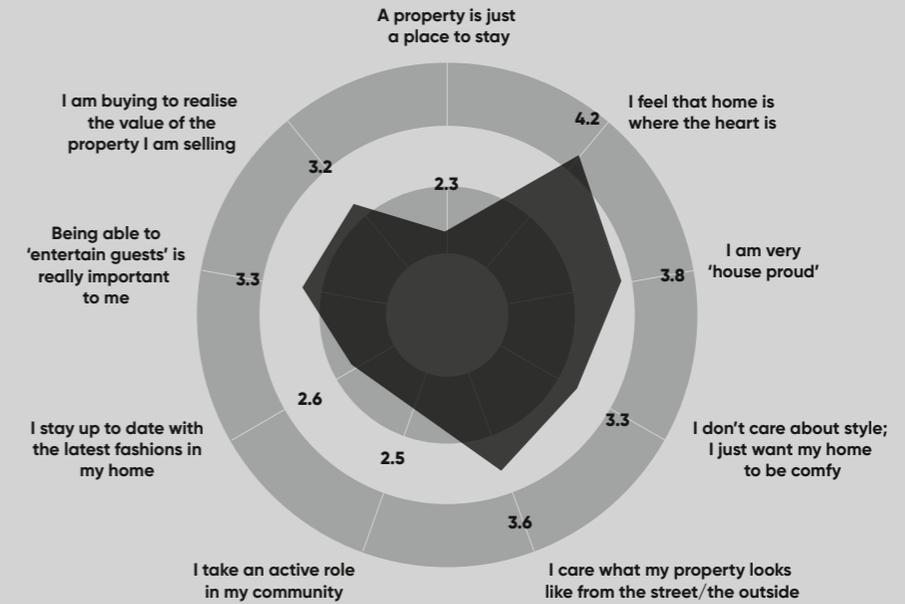
What are their behaviours?

With so much time and energy expended on family, Nurturers have little time to sit, ponder and analyse every decision. Circumstances dictate they act quickly and instinctively. But their 'instinct' is heavily informed by what others, like them, have done.

This means Nurturers often default to decisions based on what they've seen their peers do, or what their peers recommend. These mental shortcuts enable quick and effective decisions, freeing up time and energy to deal with all the challenges family life throws at them.



Home lifestyle



General lifestyle



-10

Thinking Space

-10

Identity Drive

"We currently rent a flat and we will be happy to change as soon as possible to a normal size house, with a garden for our kids and a little puppy in the future."



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"Nurturers are right in the thick of it, juggling all the demands of a young family. So, they're probably making buying decisions when they are tired, have a lot of other things on their mind, and they don't have a lot of time."

These are precisely the conditions under which Nobel Prize winner Daniel Kahneman suggests people employ 'fast' thinking (i.e., relying on gut-feeling or mental shortcuts to make quick decisions). Nurturers may therefore employ a whole range of these shortcuts when making buying decisions.

For instance, past buying behaviour can become a strong predictor of future buying behaviour, as they tend to stick with brands they know. But if they're buying something new, role-models may become reliable guides for what to buy, especially when those role models are similar to themselves or demonstrate shared experiences.

Social media is likely to be influential, as are goods and services that are – or are marketed as – easy to use. Nurturers probably don't have a lot of time to read instruction manuals.

In sum, Nurturers are likely having to think fast, but seem to have a strong tendency towards actualising their family identity."

Couplers.

Coming together to create something new

Couplers are individuals who are ready to take the next step in their relationship. They're committing to their first home together and to creating a new joint identity.

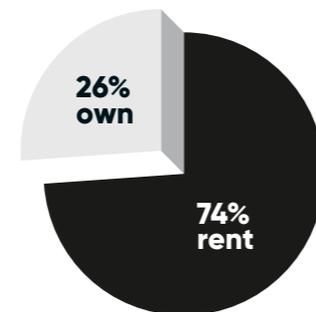
Mostly unencumbered by kids, they enjoy travel, socialising and styling their new home as an entertainment hub. A hub where they can show off their 'couple life' to friends and family.

Whilst this is a hugely exciting time, they do have some mild trepidation about what the future holds. After all, can anyone ever be totally sure that the reality will match the promise?

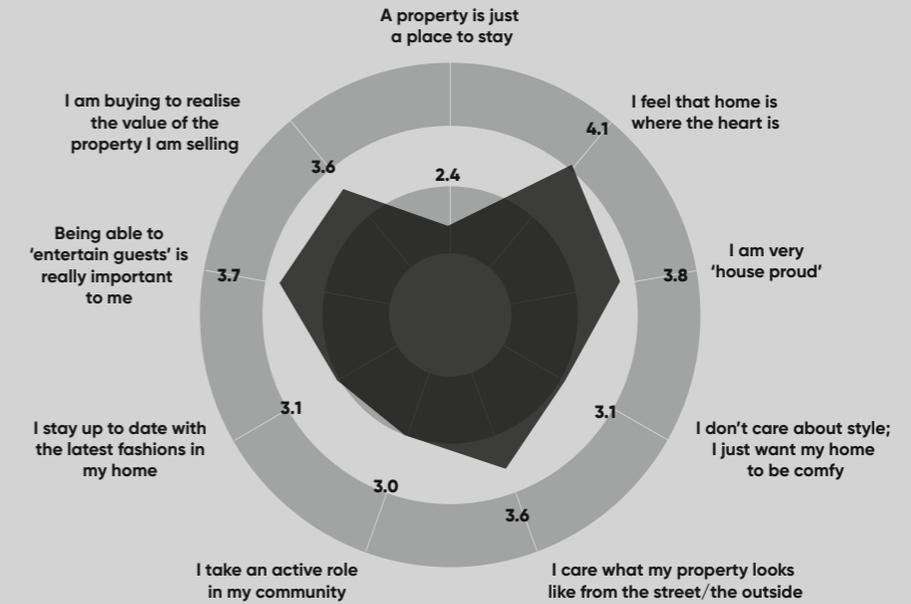
What are their behaviours?

With a huge amount of emotional capital being invested into a new relationship, decision making is firmly focussed around building their interconnections – interconnections they need to bring them closer together as a couple and to make them harder to pull apart.

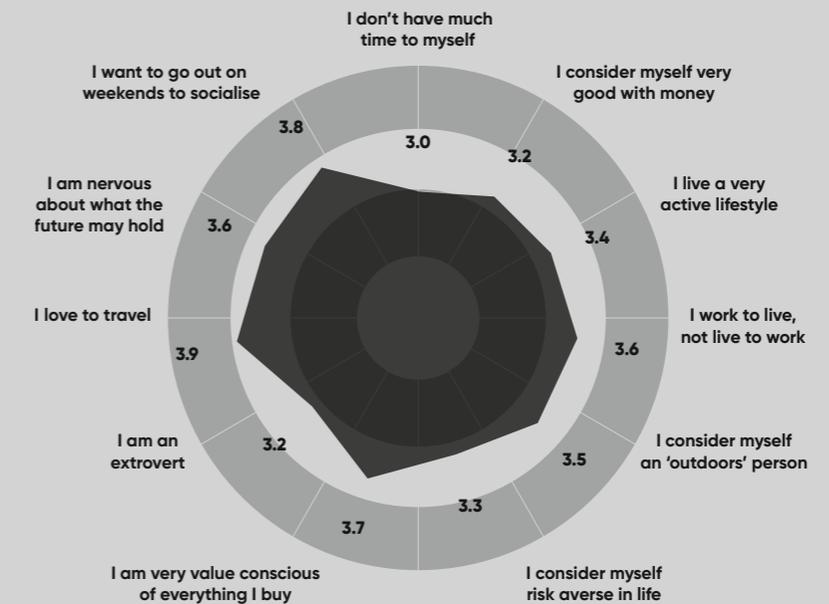
But the strength of these ties isn't simply rooted in the act of shared ownership. It is rooted in the shared experiences and memories derived from the decisions they make. So, if they believe a decision will help bring them closer together, they'll prioritise it.



Home lifestyle



General lifestyle



+5

Thinking Space

0

Identity Drive

"Moving in with my boyfriend and starting our lives together. Being somewhere new and slowly making it our own."



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"Couplers are coming together to create something new. In a psychological sense, this is really quite true. Studies have found that, over time, couples can unconsciously confuse their partner's personality traits with their own."

Based on the 'Investment Model' of relationship building, Couplers will be all about cementing their relationship with psychological bonds. These psychological bonds enable rapid merging of personal identities into the new social identity – 'we' as a couple.

For instance, you'll often hear new Couplers talking primarily of what 'we' like rather than what 'I' like. All this means that Couplers will likely be attracted to purchases that affirm and strengthen this new shared identity. In a direct sense this means beds and bedroom furniture, and more generally anything that can fill a newly co-habited environment. There'll be a tendency to go 'out with the old' (from former single lives) and 'in with the new' – anything that can be refreshed and redefined as a shared symbol of The Couple.

More generally, Couplers are all about creating a psychological investment that makes exiting unpalatable – so products and experiences that create shared memories may well appeal. In sum, Couplers appear very much focused on building a new identity, but just as much for the internal satisfaction as external expression. They seem to have some spare time to think about how to do this."



Idealists.

Living life their way

Idealists have a long-held desire for a more tranquil and peaceful way of life. For many this means an escape to the country, but for others it is simply reaching the leafy suburbs.

As one might expect, having long sought their dream move, Idealists are incredibly house proud and are keen to enjoy the peace, quiet and comfort of their new homes.

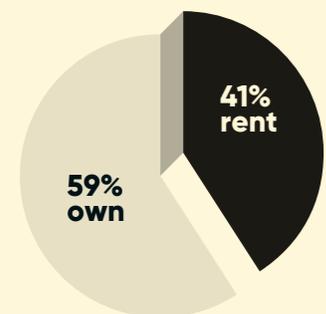
These new homes enable Idealists to become their ideal-self. Something, that as risk averse and value conscious individuals, they'll have planned long and worked hard to achieve.



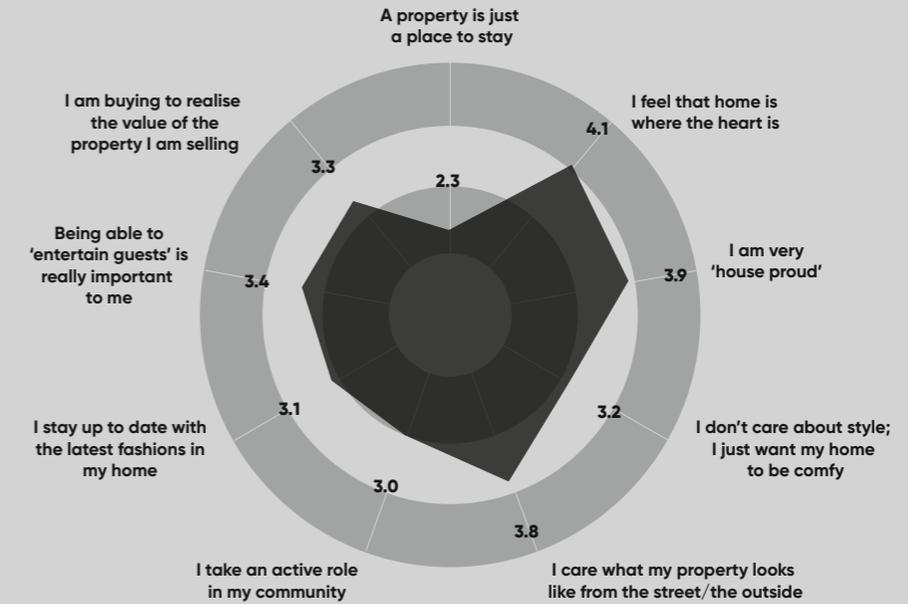
What are their behaviours?

Idealists have a very clear sense of where they are in life, but more importantly where they want to be. This gap analysis is incredibly important, because it acts as a powerful motivation for them to focus their decisions on what will help them achieve their ultimate end goal.

As a result, Idealists tend to actively manage and moderate their thoughts, feelings and behaviours. This means they can protect themselves from giving in to any short-term desires, impulses and urges that could potentially derail or delay them in achieving their long-held ambitions.



Home lifestyle



General lifestyle



+5

Thinking Space

-5

Identity Drive

**"Settling down
and being happy.
Not ever
moving again."**



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"For Idealists, moving is about creating a new social identity, but the idea(l) of the identity they want to attain has probably been honed and refined for some time."

According to Self-Discrepancy Theory, the psychological distance between one's actual identity and ideal identity can be a powerful motivator. The bigger the actual-ideal gap, the greater the 'cognitive dissonance' experienced by the individual, and so the greater the motivation to close the gap.

Idealists have closed this gap, so should seek to affirm their (finally attained) ideal identity. They're likely to have a good idea of what products will do this, having perhaps coveted them for many years. More generally, having reached such a pivotal life goal, they potentially have lots of time to make considered decisions in other areas of their life.

In sum, Idealists seem to have the time for systematic thinking, with a likely focus on affirming their actualised identity."

Showhomers.

Letting people know they've made it

Showhomers are affluent individuals, relative to their peer group, who enjoy entertaining, travel, the outdoors, fashion and style - essentially the best of what life can afford them.

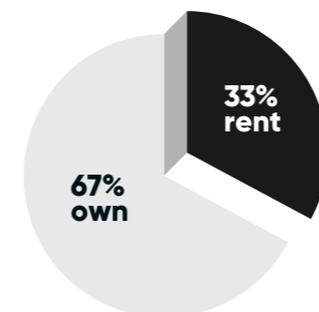
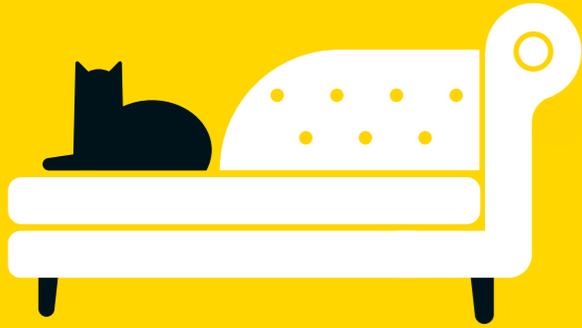
As their families and income continue to grow, they're looking for more space, access to better schools and to take further steps up the property ladder.

They take great pride in their personal and financial success, of which their home is the most overt external projection.

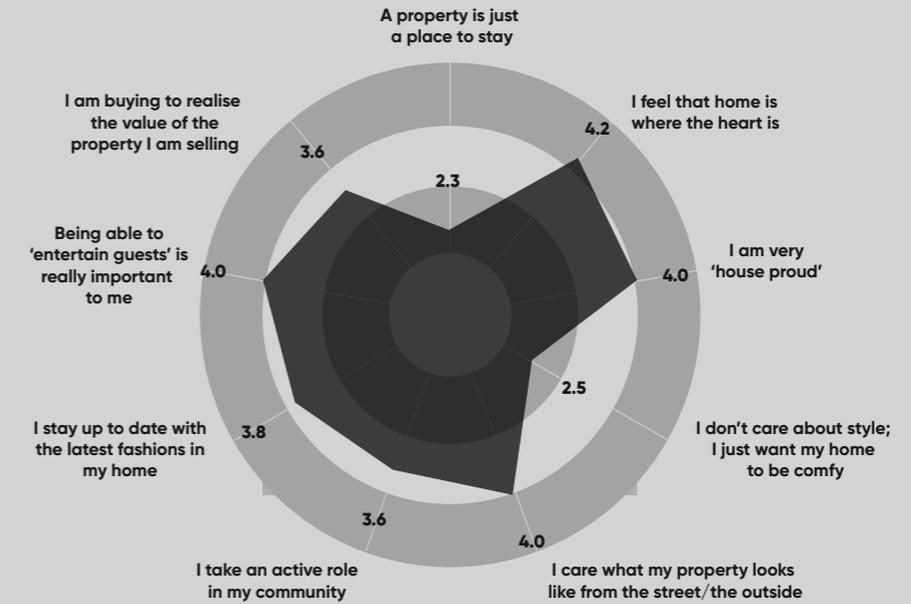
What are their behaviours?

Showhomers generally have a high level of self-esteem and maintaining this is a powerful motivator behind their decision making. However, their self-esteem is not simply derived from their success, but from believing others perceive them to be successful.

Their need for recognition means they gravitate towards products and services they believe will demonstrate an elevated status. With more time and money available to them, they can afford to be more selective about the decisions they make.



Home lifestyle



General lifestyle



+5

Thinking Space

+10

Identity Drive

"A new style and looking forward to entertaining friends."



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"Showhomers have achieved a great deal in life, exemplified by their affluence. As homes are a great source of identity-based self-esteem, Showhomers will likely choose the best furnishings to demonstrate their status and success."

Social Comparison Theory can help us understand Showhomers' buying behaviour. According to this theory we create a sense of self through comparison with others. We can make both 'upward' comparisons (focusing on people who we perceive as doing better than us) or 'downward' comparisons (people who we perceive as doing not so well as us).

The former type of comparison can depress our mood but motivate us to improve our position; the latter can make us feel good but is not so motivating. Showhomers may very consciously engage in both upward and downward comparisons to enjoy the positive feelings that come from their home, but also closely monitor others to ensure they maintain that position.

Local upward comparisons (cars, clothes, kitchens...) will motivate buying behaviour, especially if Showhomers live in a neighbourhood with many other affluent families. More generally, Showhomers will probably be attuned to relevant role models, such as celebrities, who provide guidance on goods that exemplify the next big thing.

In sum, Showhomers more than likely have some time for systematic thinking, and will almost certainly tend towards identity expression."



Balancers.

Living fast and attracted to change

Balancers tend to be young professionals with no kids; their main motivation for moving is usually a change in jobs, which results in a requirement to relocate.

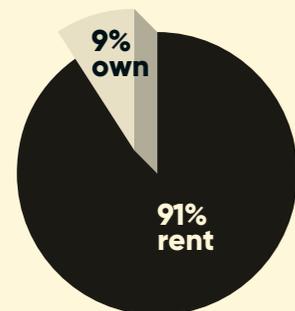
As comparatively frequent movers, they don't develop deep emotional connections with their home, seeing it primarily as a crash pad to facilitate their work hard, play hard lifestyle.

Despite this functional view of their home, location is key to them maintaining an optimal work / life balance, giving them freedom to enjoy living in the moment.

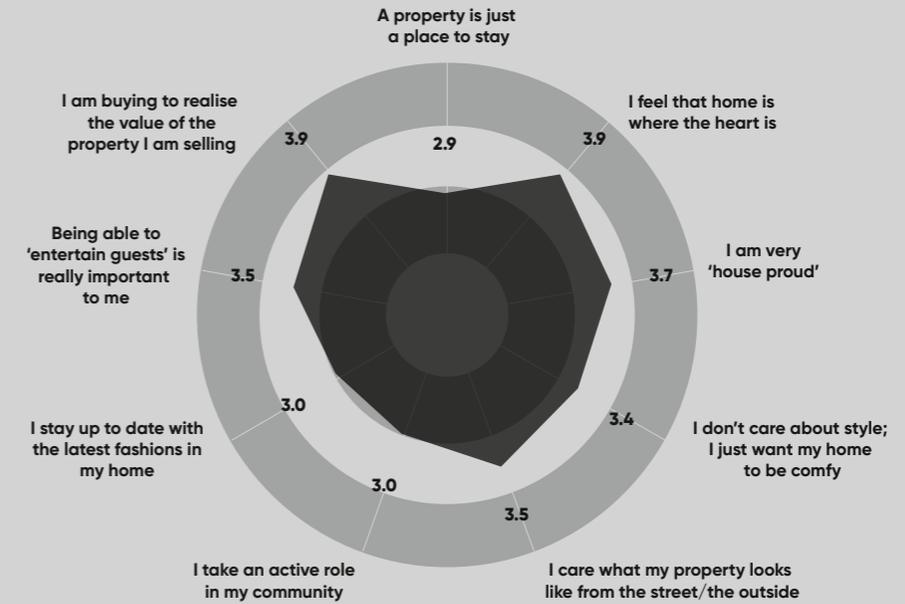
What are their behaviours?

Balancers are used to change and have a highly adaptable mindset. They recognise that they're on a journey, but as yet are unsure of the final destination. This makes them hesitant to make decisions that feel like long term commitments.

That said, their adaptable mindset means they tend to see themselves as early adopters. And while their desire to avoid long term commitments means they naturally veer towards better over best, access over ownership is appealing as it allows them to avoid this compromise.



Home lifestyle



General lifestyle



-5

Thinking Space

+5

Identity Drive

**"Close to work
reduces commute
massively."**



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"Balancers are living fast. They're attracted to change, whether it be the next big career move, new house, car, or fashion trend. This suggests the adoption of a 'dynamic' mindset."

Mindset Theory suggests that people can adopt broad tendencies to view the world as either fixed, stable and unchanging, or dynamic, flexible and ever-changing. The mindset you're prone to helps us predict all sorts of things, from voting behaviour to health surveillance.

Mindsets can be applied automatically, so it doesn't matter if Balancers have a hectic lifestyle. Balancers also seem focused on function, so products that appeal are likely to be premium quality (no time or patience for things to break down), but that can be easily replaced or upgraded when an improved version comes along (think smartphones, TVs, cars...).

In sum, Balancers don't appear to have much time for systematic thinking, but likely have a tendency towards identity expression."

Pragmatists.

Believe the devil's
in the detail



Pragmatists' main motivation to move is reducing their cost of living, often through downsizing. They're looking for something lower maintenance and that costs less to run.

Despite downsizing, home remains central to their lives. It's a place for them to enjoy quietly where comfort takes precedence over style and function matters more than form.

Being value conscious and nervous about the future, downsizing is a practical decision that allows Pragmatists to gain control and make the most of their stretched finances.

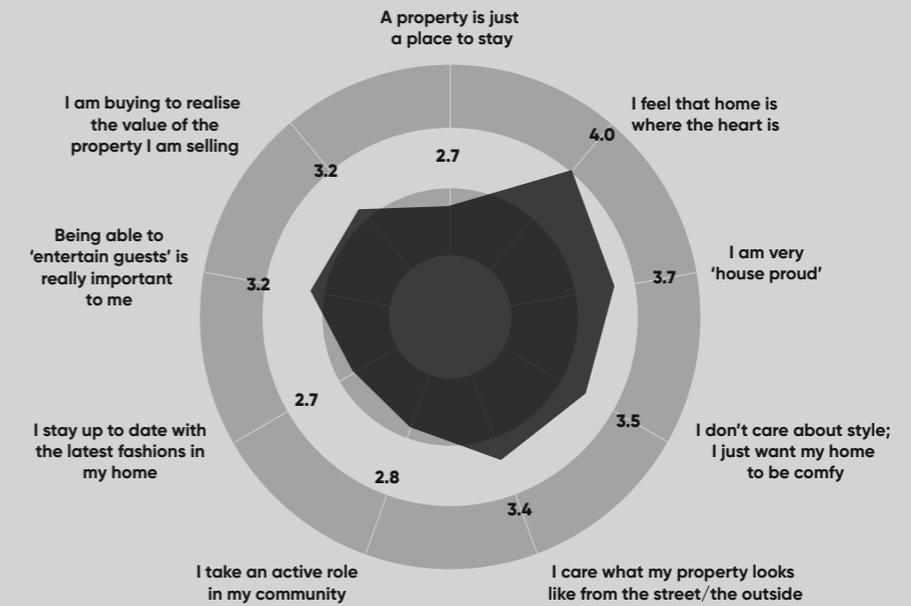
What are their behaviours?

Pragmatists adopt a very considered approach to decision making; they are inherently more rational and careful about how, when and where they spend their money. Only after detailed research and careful consideration will they arrive at a final, value-based decision.

As they take a considered approach and are often financially challenged, they're relatively impervious to external influences. Put simply, Pragmatists won't be nudged into buying things they don't need.



Home lifestyle



General lifestyle



+10

Thinking Space

0

Identity Drive

"All bills are inclusive in my rent so I don't have to worry."



Words by
Professor Richard Crisp

How does this drive their purchase decisions?

"The human mind has two modes of thinking: 'Fast' for when time and mental space is in short supply, and 'Systematic' for when there's time to really analyse all the facts. In contrast to some other tribes, Pragmatists are more likely to engage in systematic thinking when it comes to purchasing. They have the time and motivation to get buying decisions just right.

That means they'll tend to make the effort to really think about products, analyse reviews, compare, and discuss pros and cons – all to ensure they get the best possible value. They'll likely focus on functional fit and shun any optional extras that they don't need and can't afford.

In contrast to other tribes who are content to go with the flow, Pragmatists will probably be more resistant to 'nudging' and may simply discount products that don't provide the information about specifications or comparison products they like to see.

In sum, Pragmatists likely have time for systematic thinking, with identity drives unlikely to exert much influence."



Reconnectors.

Want to strengthen family ties

Reconnectors have a desire to move nearer to family and friends, so they can re-establish closer emotional ties and build up an extended support network.

As they seek to re-establish ties, it's unsurprising that they adopt an active role in their new communities and seek to actively explore and enjoy their new environment.

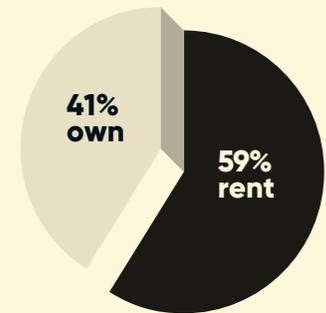
Homely, but not house proud, they value comfort over style and are generally value conscious and risk averse individuals.



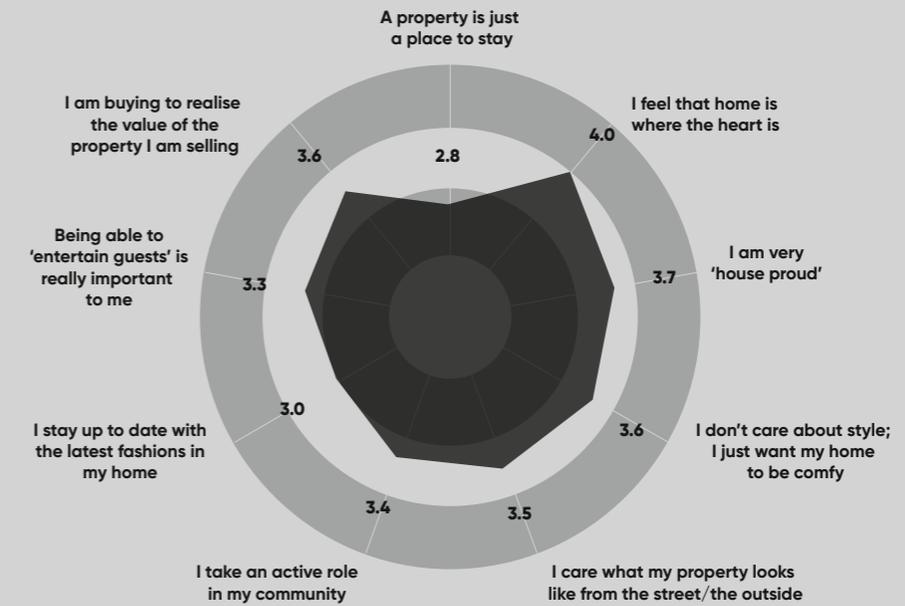
What are their behaviours?

Reconnectors tend to have more time to think and, because they are value conscious, they adopt a structured approach to decision making. However, they are also relatively affluent, which means they will look for the best they can afford.

Like Couplers, Reconnectors do not judge the value they derive from a purchase solely by the rational features and benefits it provides. They also judge it based on whether it delivers the shared memories and experiences they need to cement their newly re-established ties.



Home lifestyle



General lifestyle



+10

Thinking Space

-10

Identity Drive

"It's a good change. Schools will be closer, so will my family members - so it will be better overall."



Words by
Professor Richard Crisp

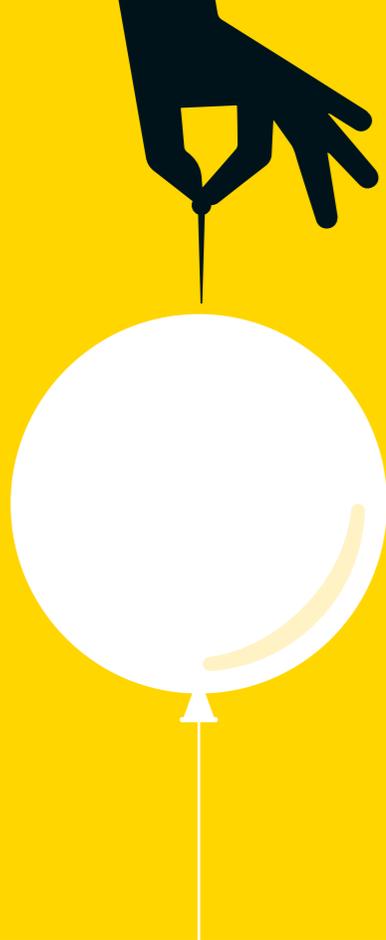
How does this drive their purchase decisions?

"Reconnectors can be considered a bit of a combination of Couplers and Pragmatists, but with some important differences. They're like Couplers in their desire to affirm, strengthen and maintain connections, in this case with their families. They're like Pragmatists in that they also have more time to think about the best ways in which to do this."

This will likely make Reconnectors less susceptible to 'nudges' because they'll be employing the systematic thinking mode characteristic of Pragmatists. However, in contrast to Pragmatists they may be less concerned by price and be willing to spend that little more for the perfect product (and those perfect memories). Think Disneyland holidays, family treats and spacious SUVs.

Like Couplers they'll be looking for products and services that strengthen ties and create shared memories (to create that 'psychological investment'). However, they will be less concerned with identity expression than Couplers, and more assuredly seeking to build a family identity for their own sense of connectedness.

In sum, Reconnectors likely have time for systematic thinking, with a seemingly strong focus on actualising family ties."



Myth busters.

Age does not define us

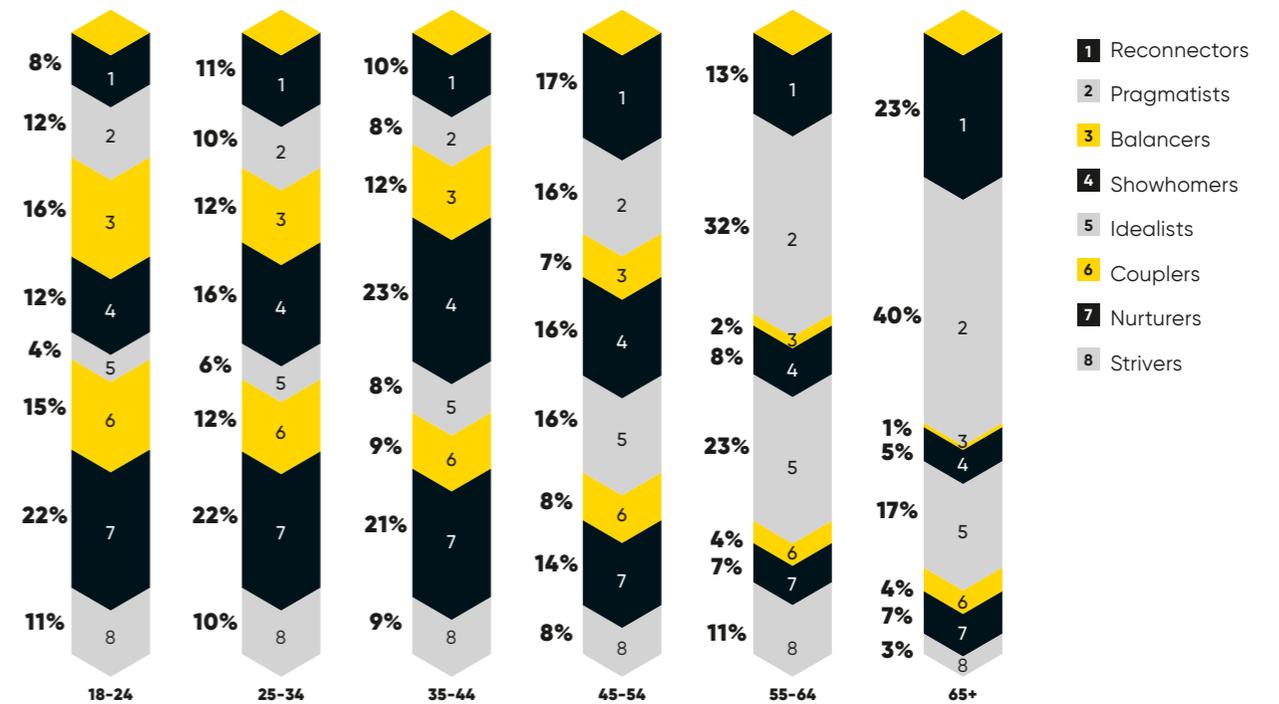
For brands targeting over 55s, the Moving Minds study paints a relatively straightforward picture; over two-thirds of movers are Pragmatists, Reconnectors or Idealists, many of whom are making their penultimate or final move. 70% are owner-occupiers. They're all rigorous in their decision making – systematic thinkers who are unlikely to be influenced by what others think. They keep their objective firmly in view as they look to satisfy their own personal needs. They can be logically convinced, but not nudged.

However, as we look at younger age groups, the connections we can make between age, move motivation and purchase behaviour become less straightforward. It's important we understand the nuances and complexities influencing this, because 25-44 year olds account for around 60% of the home mover market – a big chunk of the available opportunity.

The majority of these fall under the nebulous 'Millennial' moniker, a categorisation that perfectly exemplifies the use of age demographics to oversimplify and generalise. They're typically characterised as having a shared set of attitudes, habits and behaviours, despite being one of the most diverse generations in history.

The move motivations and decision-making behaviours of a 36 year-old mum are more aligned to that of a 25 year old in similar circumstances, than they are to her single, career driven friend of the same age.

The Moving Minds segmentation helps brands look beyond simple generational stereotyping, to really understand what makes people tick, how they make decisions, and how to influence their purchase behaviour.



- 1 Reconnectors
- 2 Pragmatists
- 3 Balancers
- 4 Showhomers
- 5 Idealists
- 6 Couplers
- 7 Nurturers
- 8 Strivers

Myth busters.

Generations rent

Renters account for over 70% of all home moves. This is not surprising when you consider that 60% of renters stay an average of 3 years or less in each property, whereas buyers stay an average of 21 years.

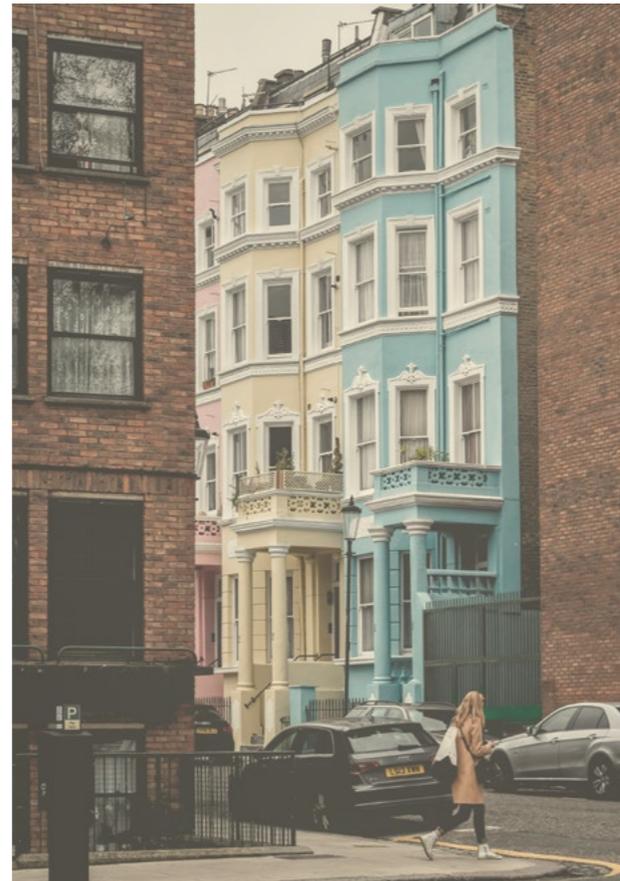
This skew to rental is set to grow. With the number of 55+ year old renters doubling in the last 15 years, and half of babies in the UK now being born into rented homes, we are not simply talking about a 'Generation Rent' but about 'Generations Rent'.

Marketing which targets home movers has traditionally focused on buyers, largely ignoring the potential of the renter. For some sectors and brands this may be the right approach, but for others, ignoring renters means they are missing out on a sizeable – and growing – opportunity for sales in the short term, and for purchase frequency and brand loyalty in the longer term.

The Moving Minds research is designed to understand both. While we have seen slight variances in the nature of products and services bought by renters vs buyers, the study demonstrates that both share – and can therefore be segmented by – the same core set of attitudinal motivations to move. Their decision-making behaviours and attitudes are remarkably similar too.

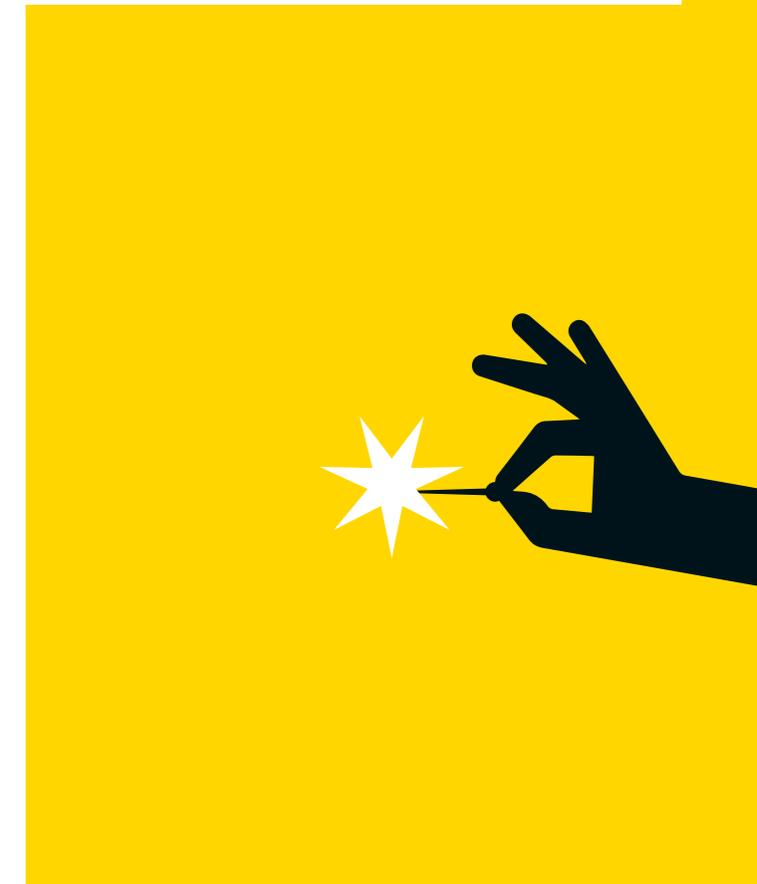
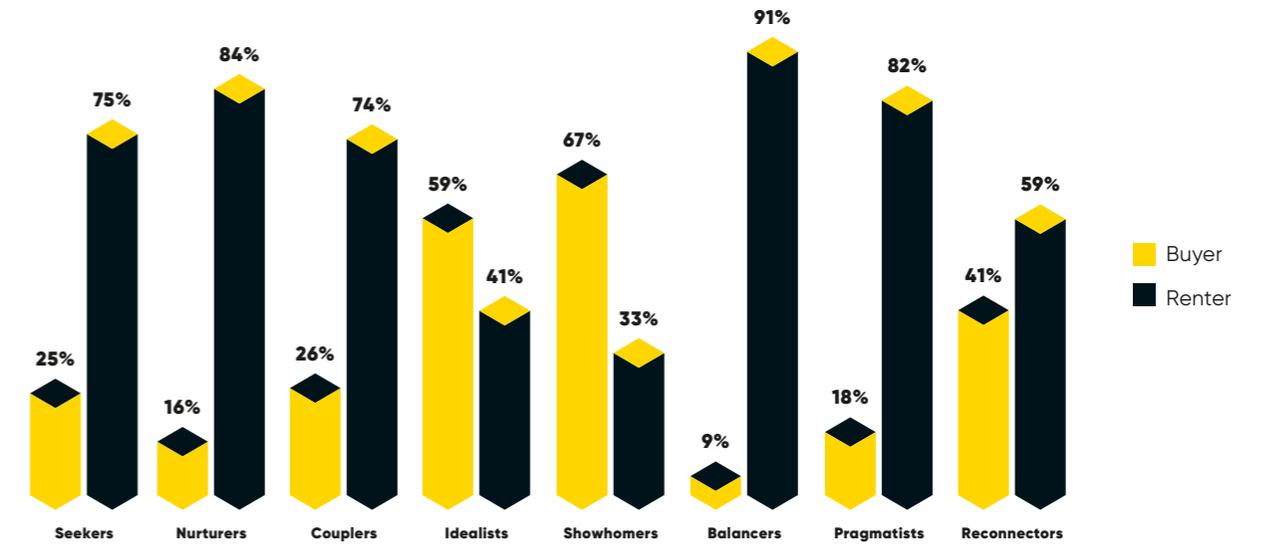
This will offer new opportunities for brands keen to unlock the spending potential of anyone in a moving mindset and highlight new avenues for brands who have previously dismissed it as a strategy for the home buying market only.

With Generations Rent growing, there are more opportunities than ever to realise the commercial value of anyone on the move.



Moving Minds **Generations rent**

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Conclusion.

Behind every rational reason for moving to a new home, there are powerful emotional needs to be met. Moving Minds helps us to understand these needs, and how they make movers behave.

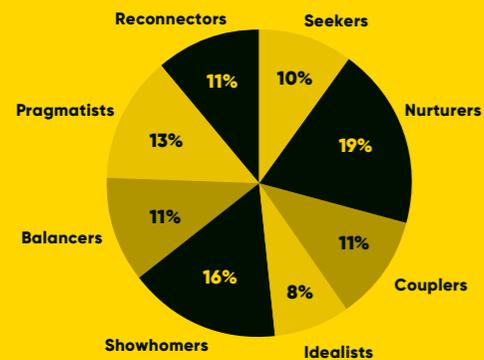
By identifying the link between these behaviours and purchase decisions, Moving Minds is a powerful tool for brands to unlock home movers' potential to spend.

Get in touch

To explore practical applications of these insights (and the wealth of data behind them) for your brand, contact:

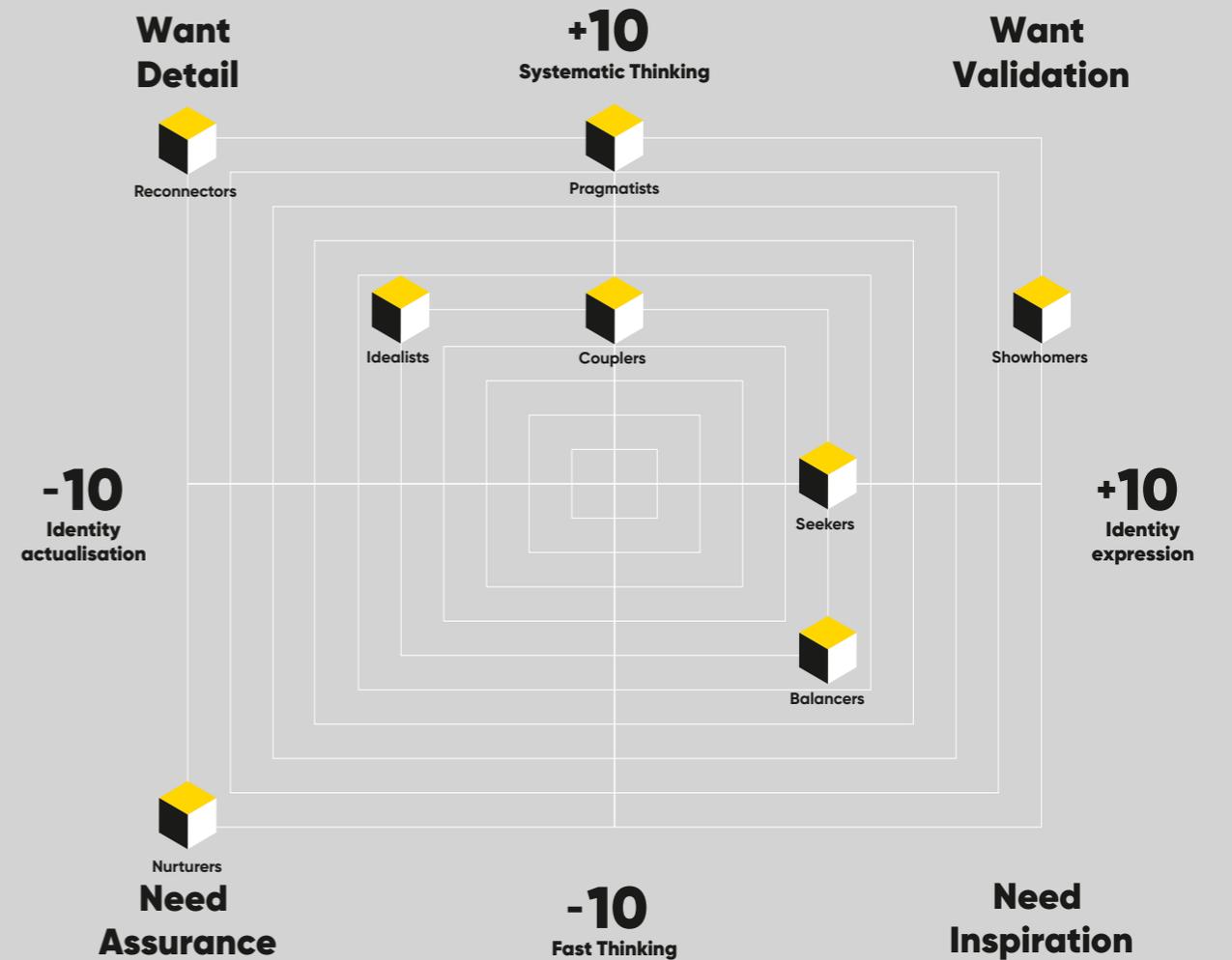
Gareth Evans
 Growth Director, Cogent
gareth.evans@cocent.co.uk
 07850 774 895

Segment sizes



Nationally representative sample of 2000 home movers surveyed (both buyers and renters).

How might your brand meaningfully engage with the eight tribes?



Note: Tribes are located according to their scores on the following two dimensions.
 Thinking Space: -10 ('fast' thinking) to +10 ('systematic' thinking).
 Identity Drive: -10 (identity actualisation) to +10 (identity expression).



cogent.

We are an integrated marketing agency creating simple and effective ideas through our ethos of togetherness.

ragdoll

Ragdoll is a full-service market research agency that focuses on generating commercial intelligence rather than just data.



Durham University is one of the world's leading universities, ranked 78th in the QS World University Rankings 2020. The Department of Psychology is ranked among the Top 10 Psychology Departments in the UK and is known for its world-leading research.

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Growth Director, Cogent

gareth.evans@kogent.co.uk

07850 774 895

cogent.

kogent.co.uk/movingminds