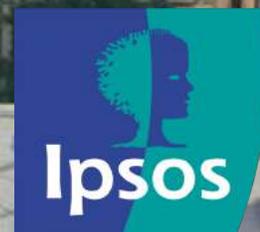


Uncover the underlying motivations and barriers for energy efficient renovations

Report for European Climate Foundation

Amsterdam, 12 March 2019

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Uncover the underlying motivations and barriers for energy efficient renovations

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Introduction



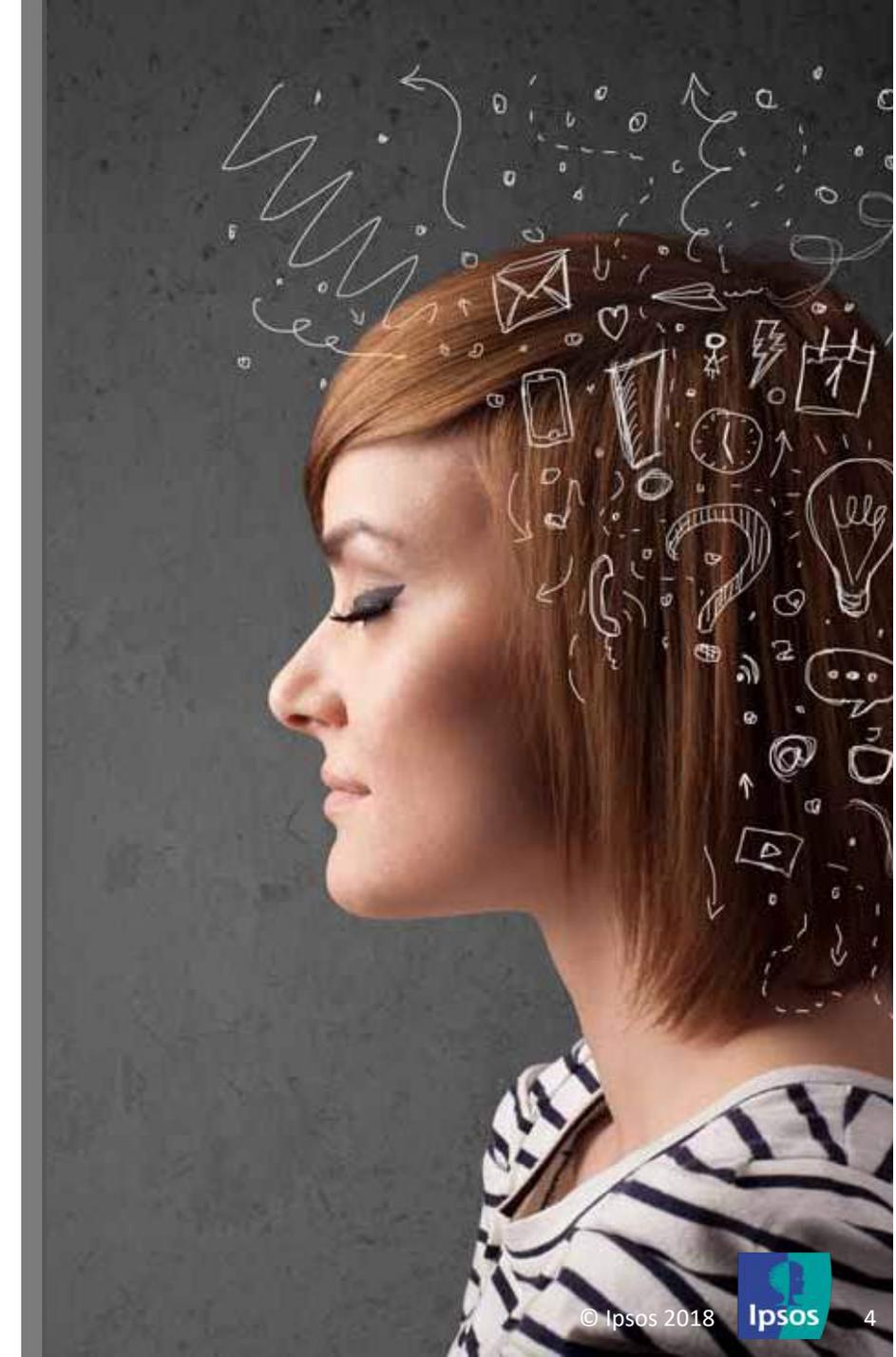
Uncover citizens' motivations and barriers to engage and support energy efficient renovations

This study was commissioned by the European Climate Foundation to better understand the motivations and barriers among citizens in five European countries to carry out energy renovation in their homes.

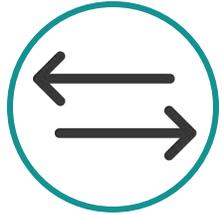
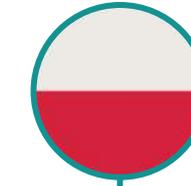
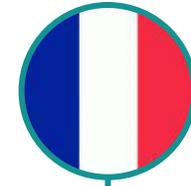
More than 97% of Europe's building stock must be upgraded to achieve the 2050 decarbonization vision. This calls for not only EU and national policies to accelerate investments in energy efficiency but also minimum energy efficiency requirements for existing buildings.

To build political support for the latter and to mainstream the demand for net zero energy buildings, European citizens' concerns around health and social equity related to the renovation of their homes need to be understood and heard.

The five countries in this study represent diverse socio-economic, geographical and cultural characteristics and have been selected to demonstrate the differences across various European contexts.



Who we spoke with



	Germany	France	Spain	Bulgaria	Poland
Home owners	45%	68%	82%	89%	87%
Tenants	55%	32%	18%	11%	13%
Single detached home	28%	50%	15%	31%	34%
Single attached home	11%	15%	24%	12%	6%
Apartment	60%	35%	59%	57%	60%
Left politically oriented	55%	43%	57%	31%	43%
Right politically oriented	31%	35%	29%	37%	35%
No children	69%	55%	56%	62%	54%
Children in household	31%	45%	44%	38%	46%

1



Summary of all countries

Main motivations and barriers for energy efficient renovations



Most important insights

Awareness and knowledge of ‘highly energy efficient homes’, ‘energy neutral homes’ or ‘passive homes’ differ per country



A popular topic, but mainly in daily life

- In Germany energy efficiency is a **popular** and present topic.
- Energy efficient solutions are **often used in daily life** but less in the form of energy efficient renovations because of a lack of knowledge and time (e.g. using eco-friendly devices).



Low awareness

- In France, the **awareness** of the terms “zero emission” or “neutral house” is still **low**.
- Associations with this are linked to **sustainability**: recyclable or natural materials, solar panels, green spaces, sustainable development, ecological houses, connected houses.
- The French recognize a growing trend towards zero emission buildings, perceived as **modern** and in line with the current ecological challenges facing our planet.



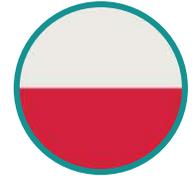
Perception of inaccessible

- In Spain energy efficient renovations are **hardly considered**, due to barriers for renovation in general.
- Although ‘Energy efficient homes’ are seen as easily understandable and perceived as accessible (anyone can do it), ‘Energy neutral homes’ are more **difficult to understand**. This is perceived as a bit inaccessible (only for the wealthy people).



Positive attitude

- In Bulgaria people are not very familiar with energy efficiency, but have a **certain understanding**. They relate it to making use of **alternative energy** sources like solar panels, and to limit energy waste.
- Bulgarians have a positive **attitude towards** energy efficiency: they relate it to a certain sense of responsibility, to forward thinking and an up-to-date attitude. On top of that, energy efficiency will result in **improved living conditions**.

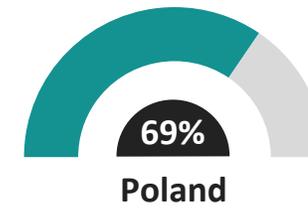
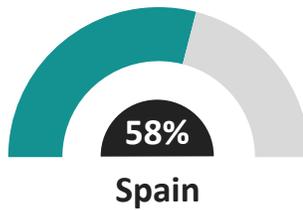
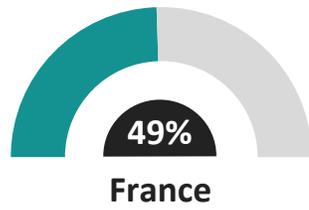
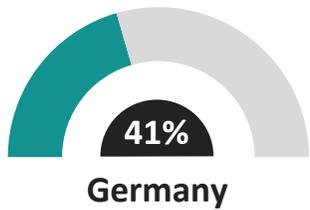


A monetary benefit

- In **Poland** “net zero energy buildings” is an **unknown** term. More familiar terms are *cost saving / ecological* and sometimes *passive* houses/flat.
- It is mainly related to the possibilities of reducing the flat/house **energy consumption cost** (solar panels, insulation).

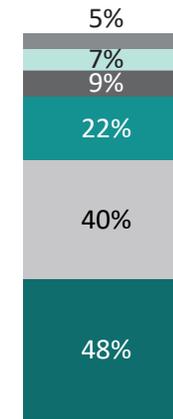
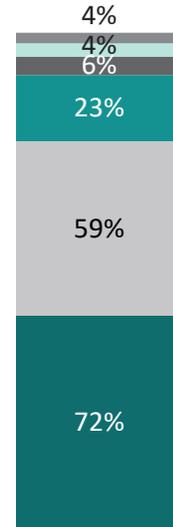
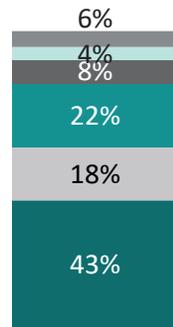
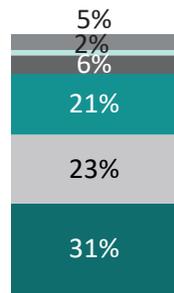
Number of respondents who made energy efficient renovations differs per country. Insulation and window glazing are most often carried out

Made a renovation in their current home (at any given point in time):



The countries where the most renovations are made also have the highest percentage of home owners.*

Type of renovations:



- Smart home control system
- Solar thermal collectors
- Solar panels
- More efficient heating systems
- Roof, wall and floor insulation
- Better windows

Made at least 2 renovations:

22%

26%

28%

57%

37%

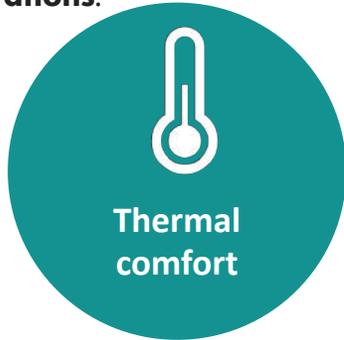
*Differences between home owners and tenants can be found on the first slide of each country specific chapter

Question: Have you made, or had influence in making one of the following energy efficient renovations around your house?

Base: All respondents (n=6004)

But despite the differences, there are three main motivations for all countries:

Main motivations:



“Will keep me warm in winter and cool in summer”

“It is important to feel at ease at home, to feel the good vibes”



“Will save me money as I need less energy for heating and electricity”



“I will have a healthy environment to live in for me and my family”

“I believe that the house is actually the family in this house. When the family is united the home is cozy”



From protection and comfort....

A house should offer protection and shelter against all possible influences (noise, weather conditions) from the outside world. A house is perceived as a place (a nest, a cocoon) for retreat: to take some rest from a (hectic) daily (city) life and to recharge.



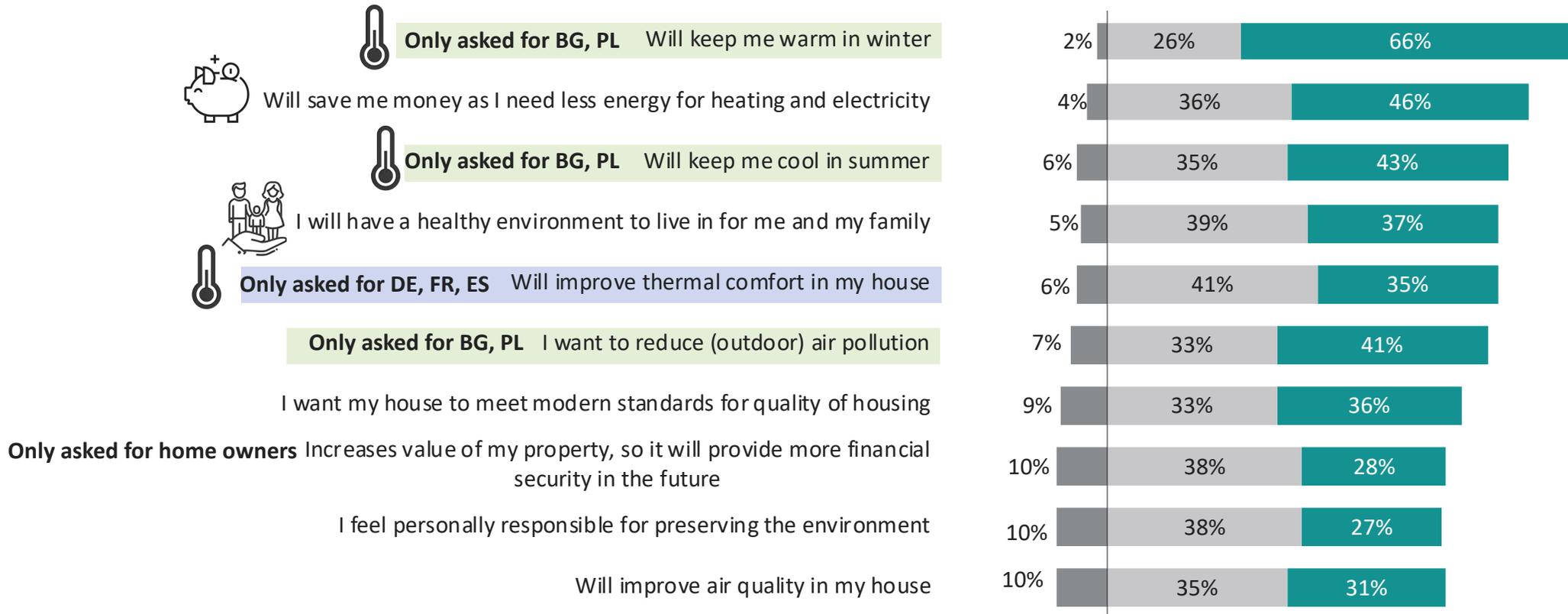
... to social connection

If the basic need for protection and comfort is fulfilled, the house can serve as a base for good relations.

Thermal comfort, saving money and healthy environment are the main motivations across all countries

Top 10 motivations:

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ A motivation (4) ■ Completely a motivation (5)

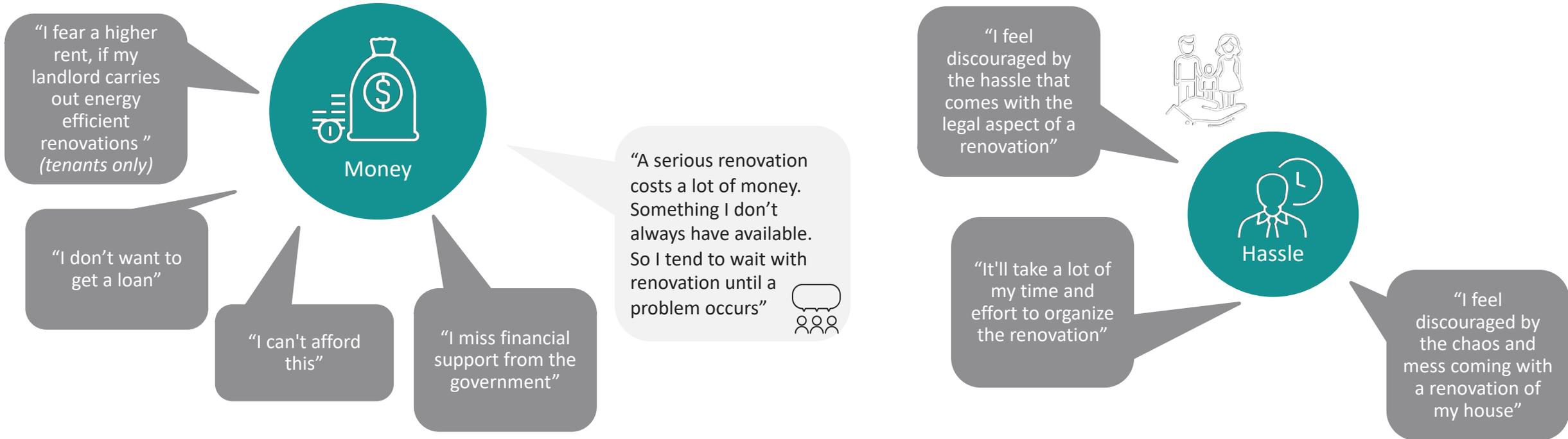


Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.

Base: All respondents (n=6004)

For all countries there is one main barrier: Money. Too much hassle is also holding citizens back, but to a lesser extent

Main barriers:



Costs

Renovation requires substantial investment. Not everyone can fund any renovation at any time: money has to be lent, or set aside to make a renovation happen.



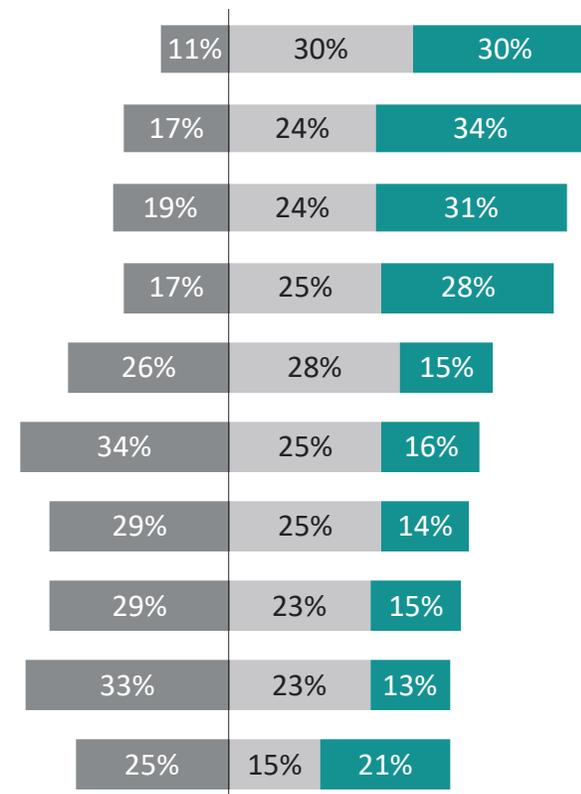
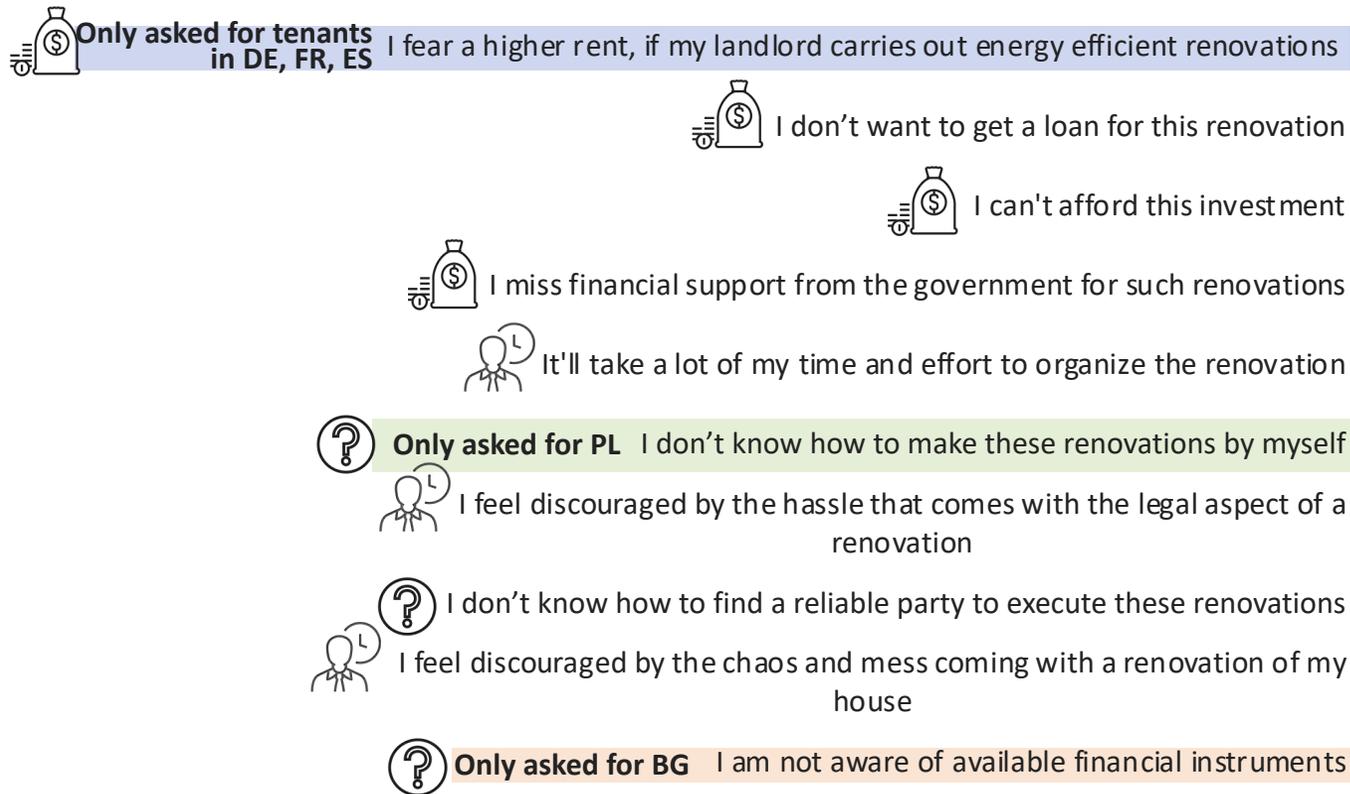
Hassle

Renovation always brings a lot of hassle: getting legal permission, coming to an agreement with other households living in the same building, finding a reliable contractor, possibly moving out of the home, dirt and mess are all barriers taken into account when considering home renovation.

Citizens are mainly held back by money, followed by (expected) hassle. A third factor is a lack of (procedural) awareness

Top 10 barriers:

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ A barrier (4) ■ Completely a barrier (4+5)



Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.

Base: All respondents (n=6004)

There are some overall group differences in motivations and barriers

Motivations



Women score higher on environmental motivations. They more often fear consequences of climate change, feel more responsible for preserving the environment, want better outdoor air quality.

Women are also more triggered by improving their quality of living, by improving indoor air quality and a healthy environment.



Men on the other hand like their houses to be equipped with the latest technology and like to experiment with this.



Citizens who own a house are more motivated in general. The same applies for higher income households and households with children.



Politically left oriented citizens are more often triggered by environmental motivations.



Politically right oriented citizens are more likely to renovate because they like to have the latest technology and want to improve the looks of their house.



Those who live in rural areas seem to be more influenced by their peers. They are more often motivated to make renovations because others do it, to make their houses look better and because they want their houses to be equipped with the latest technology.



For people living in the city it is more often a motivation to renovate because it reduces noise.

Barriers



While women are more often triggered to make renovations, they are also more often held back to make them. Money is a big barrier, but also the hassle and a lack of knowledge hold them back.



Those within the age of 18-34 lack money to finance the investment. They are also more sceptical if it will actually result in energy saving or will protect the environment.



Citizens living in the cities more often do not make renovations because of the hassle and a lack of awareness on options and state funding.



Households with a below average income more often don't want to make renovations because they can't afford it, but also don't want to take a loan.



Politically right oriented citizens have the tendency of not being open to making energy efficient renovations. They don't think it's worth it, think their efforts will have no or minimal environmental impact, don't want to change the look of their house and they are happy with how it is.

2

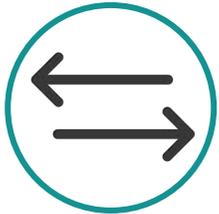
Germany



Most important insights

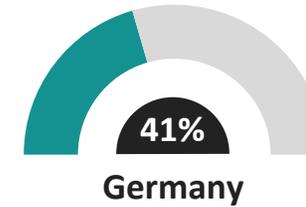


Who we spoke with

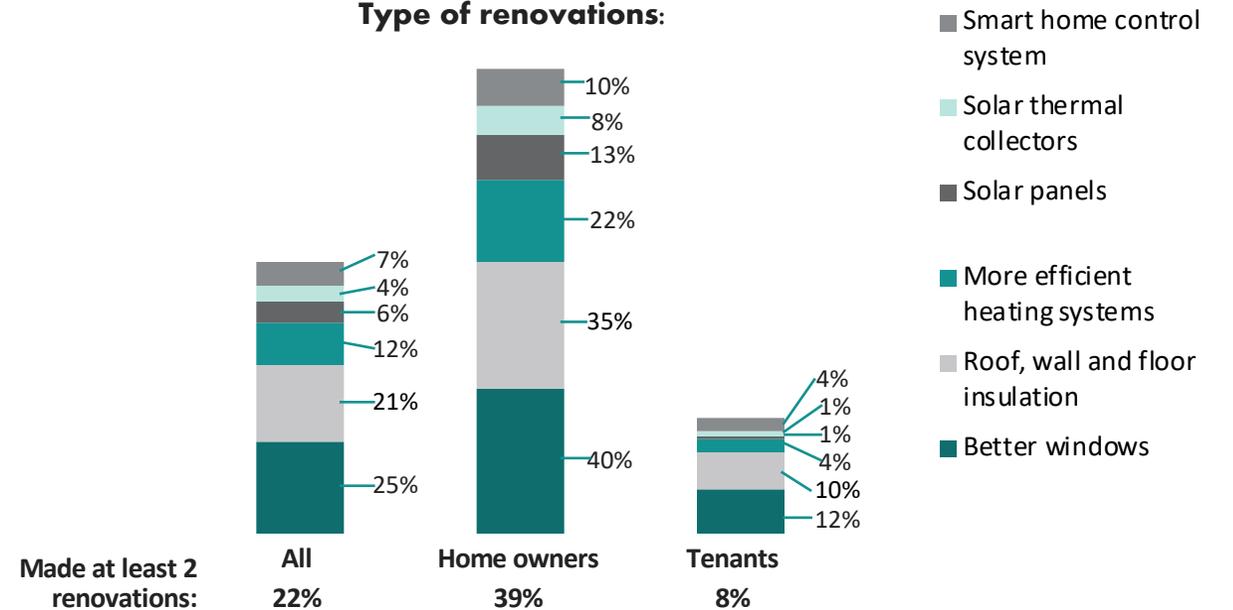


Home owners	45%
Tenants	55%
Single detached home	28%
Single attached home	11%
Apartment	60%
Left politically oriented	55%
Right politically oriented	31%
No children	69%
Children in household	31%

Made a renovation in their current home
(at any given point in time):



Type of renovations:





German citizens are mostly motivated by saving money, but held back by the investments that need to be made

Motivations



Saving money

“Will save me money as I need less energy for heating and electricity”

Barriers



Costs

“I don't want to get a loan”

“I fear a higher rent, if my landlord carries out energy efficient renovations”
(tenants only)

“I can't afford this”

“I miss financial support from the government”



Qualitative conversations

Cost savings are good triggers...

In **Germany** energy efficiency is a popular and present topic. A positive cost-benefit balance is especially appealing: a renovation provides cost saving in the long term.



Qualitative conversations

...but making investments is a barrier.

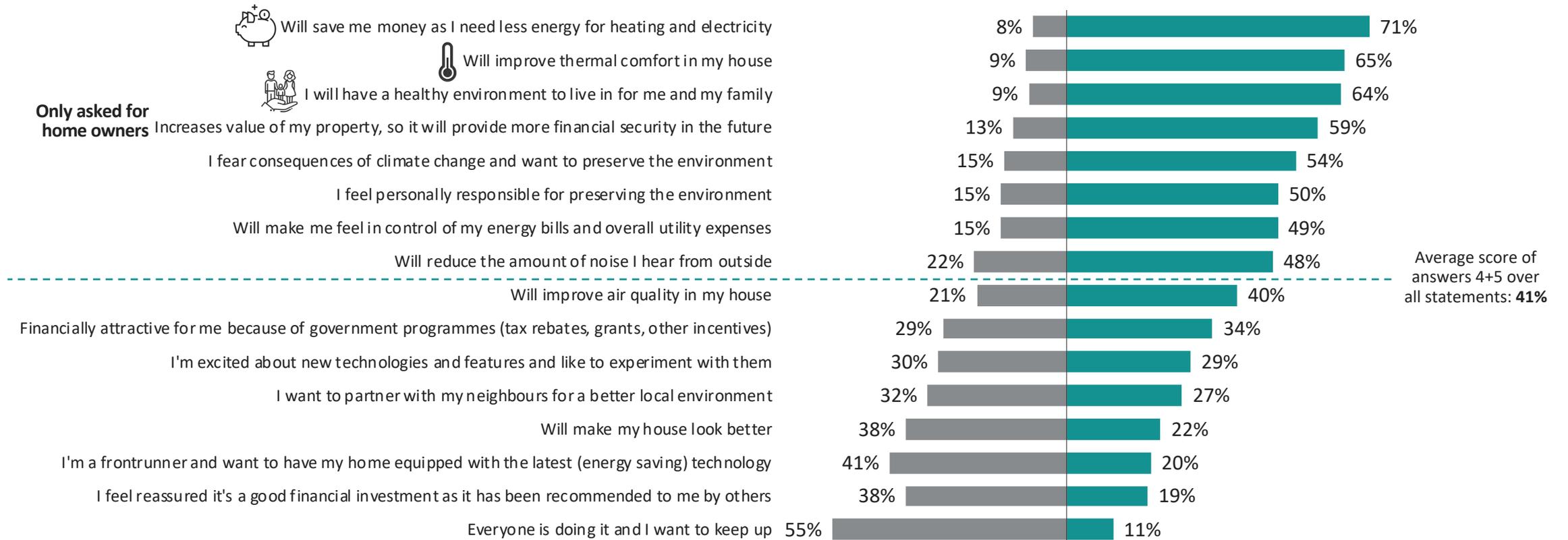
Citizens are not able or not willing to make high costs for modernization. Tenants fear a rent increase.



Next to saving money, thermal comfort and healthy environment are most able to motivate Germans to renovate

Motivations:

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.

Base: All respondents in Germany (n=2001)



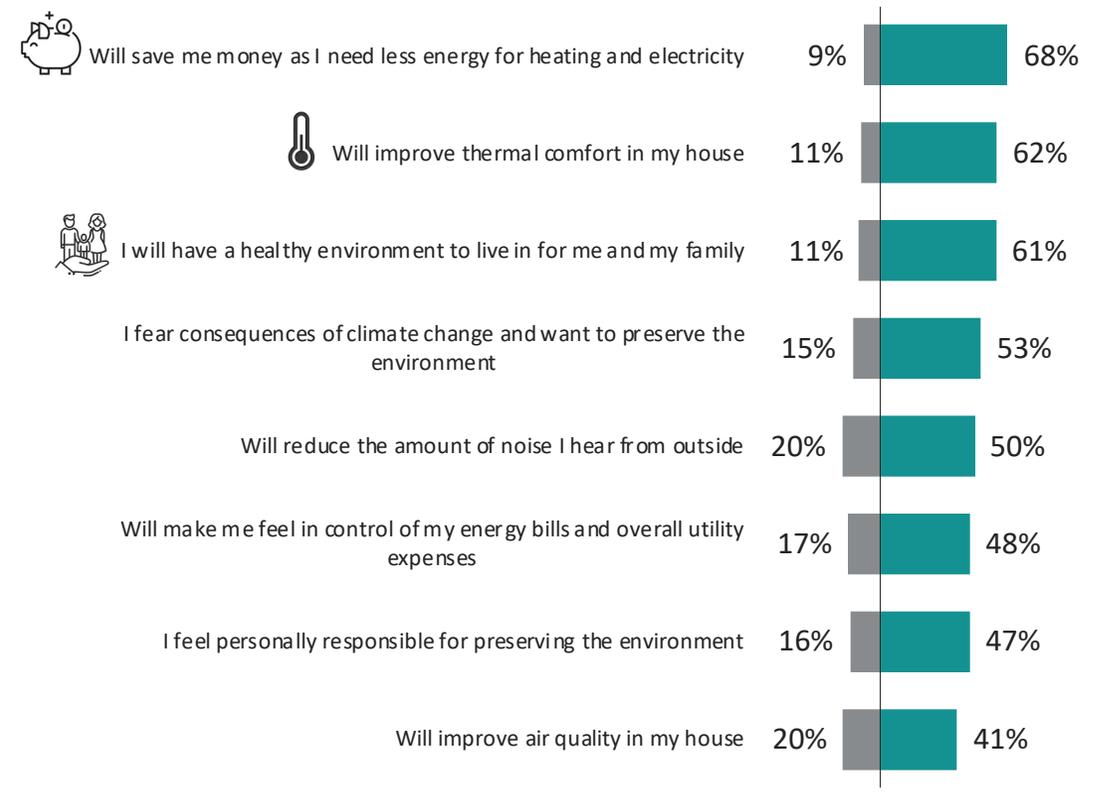
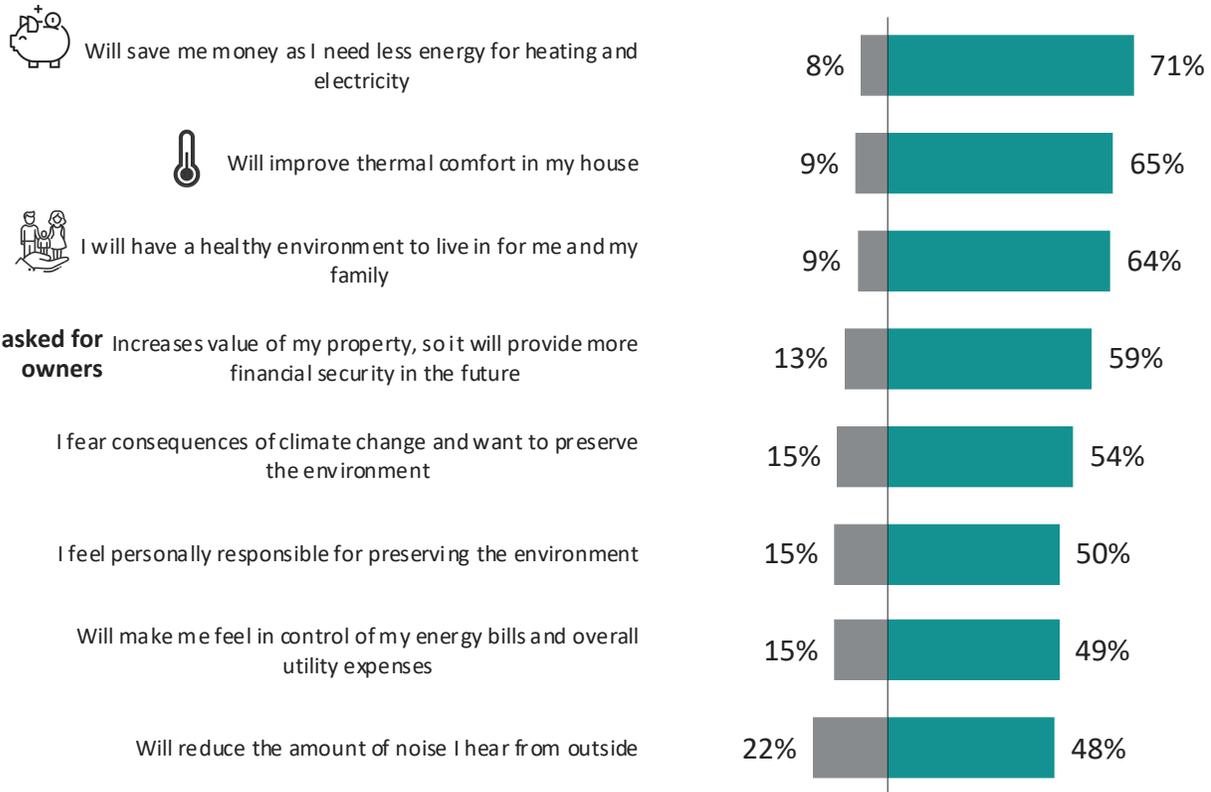
Home owners and tenants are similarly motivated by the same triggers

Main motivations (score above country average) :

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)

Home owners

Tenants



The full list of motivations for home owners and tenants can be found in the appendix

Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.

Base: All respondents in Germany (n=2001)



All German citizens, but especially tenants, are held back by monetary barriers

Barriers:

Only asked for tenants



I fear a higher rent, if my landlord carries out energy efficient renovations



I don't want to get a loan for this renovation



I can't afford this investment



I miss financial support from the government for such renovations

It'll take a lot of my time and effort to organize the renovation

I have no overview of possible state funding opportunities

I feel discouraged by the chaos and mess coming with a renovation of my house

I'm happy with my house as it is, I don't see any need for improving my living conditions

I don't know what options are available

I lack credible examples of success stories of energy efficiency renovations

I feel my personal efforts will have minimal impact on the environment if others don't do the same

I don't know how to find a reliable party to execute these renovations

Though I could afford it, I don't think it's financially worth the investment

I fear an increase of dangers (for example increased risk of fire through insulation)

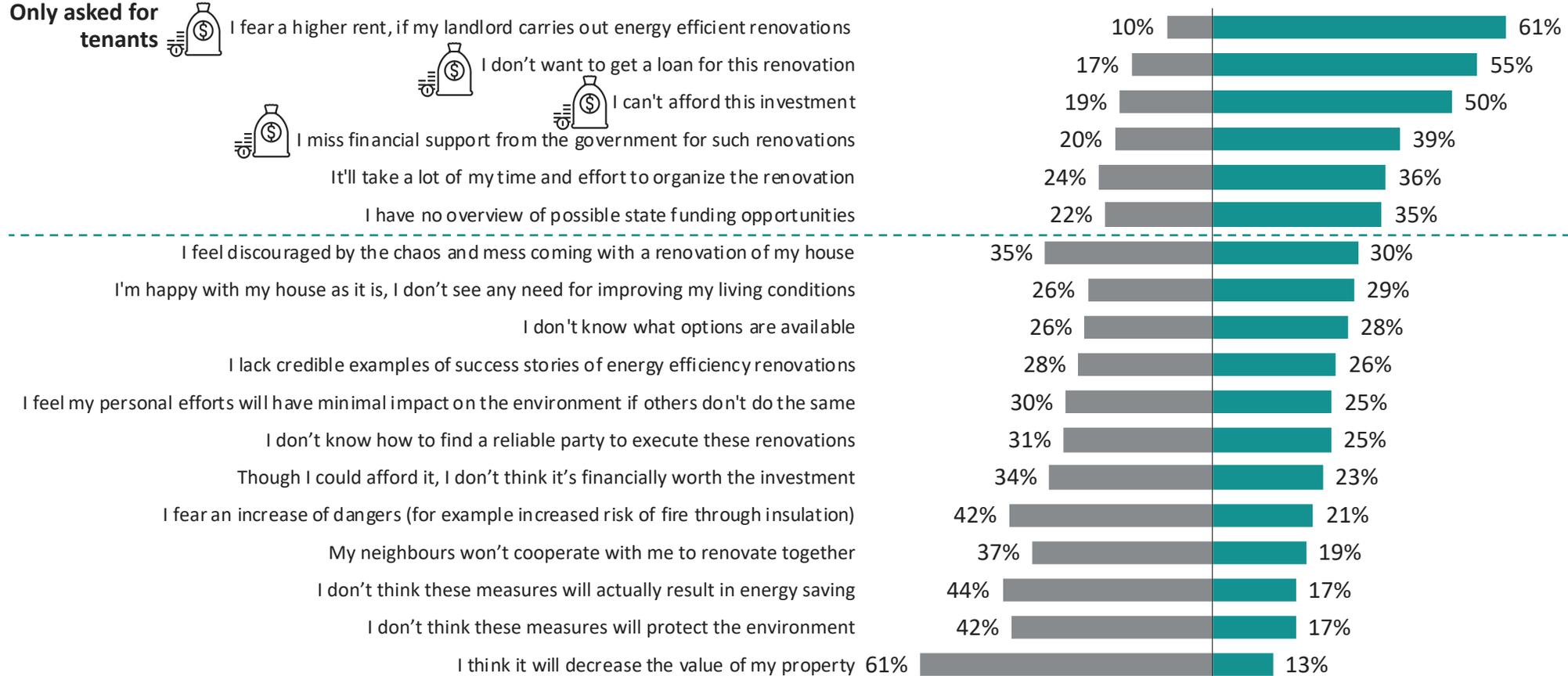
My neighbours won't cooperate with me to renovate together

I don't think these measures will actually result in energy saving

I don't think these measures will protect the environment

I think it will decrease the value of my property

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



Average score of answers 4+5 over all statements: **30%**

Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.

Base: All respondents in Germany (n=2001)

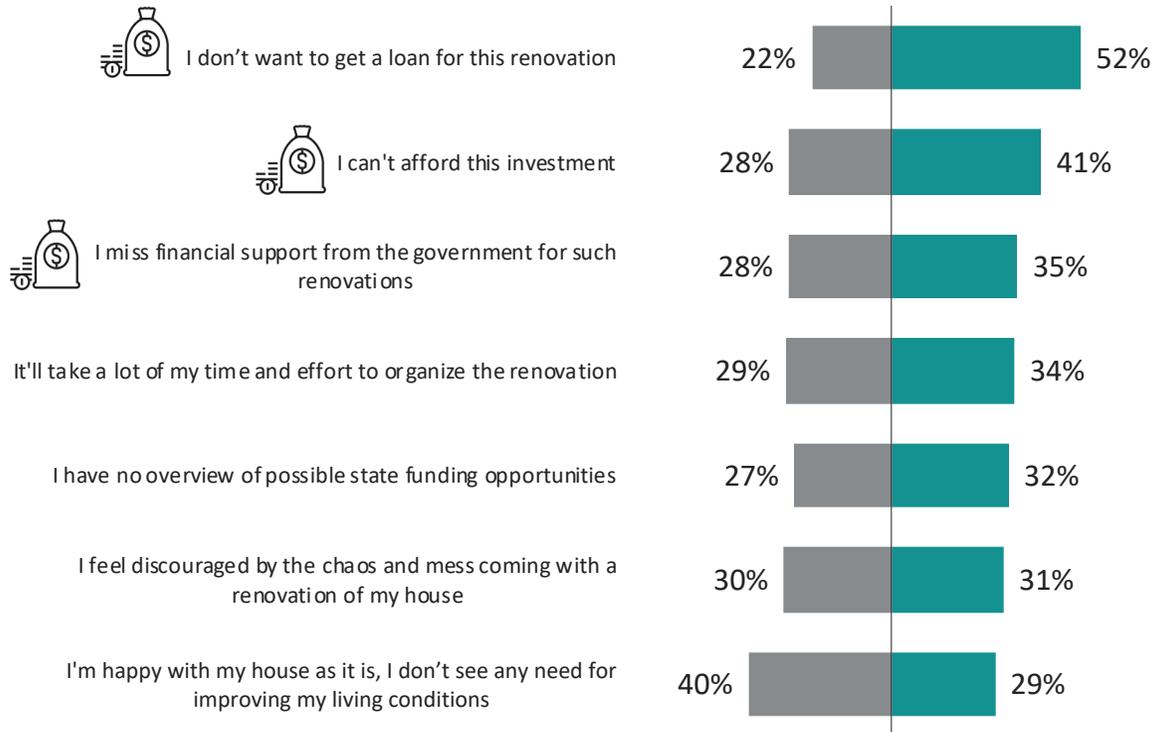


Barriers across home owners and tenants are nearly the same and only differ on two barriers

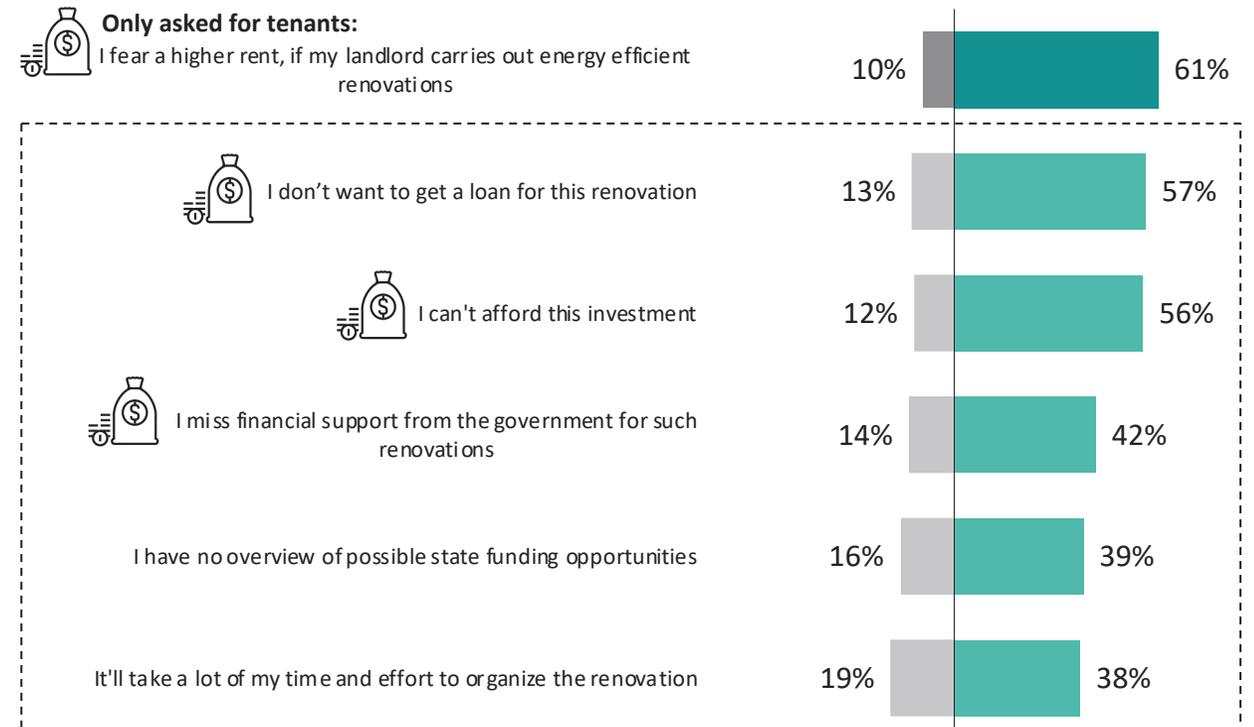
Main barriers (score above country average) :

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)

Home owners



Tenants



Answers on these statements from tenants are mainly hypothetical (in the case that tenant decides to become a homeowner)

The full list of barriers for home owners and tenants can be found in the appendix

Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.

Base: All respondents in Germany (n=2001)



Motivations and barriers differ between genders, life stages, political orientation and home owners/tenants

Motivations



Women score higher on environmental motivations. They more often fear consequences of climate change and feel more responsible for preserving the environment.

Women are also more triggered by improving their quality of living, by improving indoor air quality, a healthy environment and thermal comfort.



Households with children are more motivated in general. The same applies for average and higher income households and home owners.



Those within the age range of 18-34 seem to be more influenced by their peers. They are motivated to renovate because everyone is doing it or because it has been recommended by others.



Politically left oriented citizens are more often triggered by environmental motivations. They more often fear the consequences of climate change and feel more responsible for preserving the environment.



Politically right oriented citizens are more likely to renovate because they like to have the latest technology and want to improve the looks of their house. Also peer influence is a stronger motivator for them.

Barriers



While women are more often triggered to renovate, they are also more often held back to make them. Money is an even bigger barrier to them, but also the hassle and a lack of knowledge hold them back.



Those within the age range of 18-34 can't afford to renovate. They also lack awareness on where to find a reliable party, or what options are available.



Citizens aged 55-75 are less willing to take a loan to finance the renovation.



German tenants face more (potential) barriers in general. The same applies to those living in urban areas and those living in apartments.



Politically right oriented citizens have the tendency of not being open to making energy efficient renovations. They don't think it's worth it, lack credible examples, don't believe it will result in energy saving or protect the environment.

3

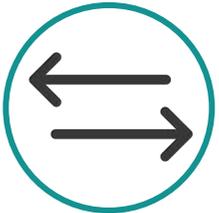
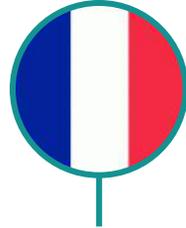
France



Most important insights

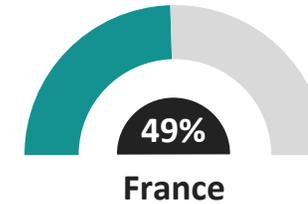


Who we spoke with

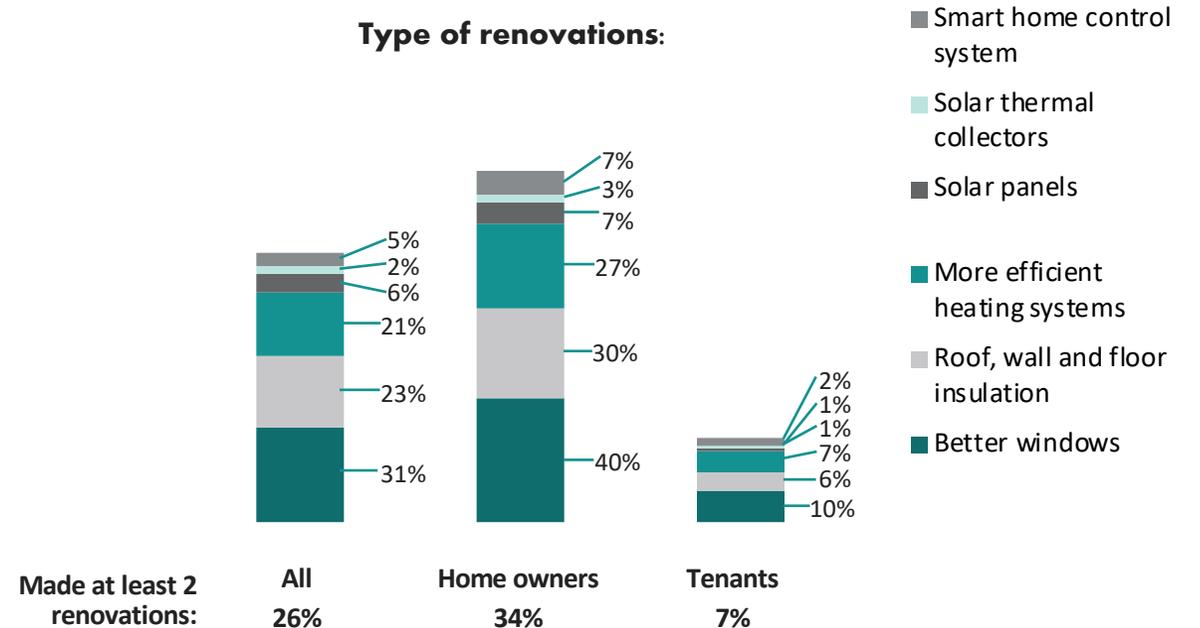


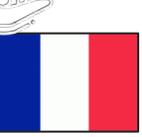
Home owners	68%
Tenants	32%
Single detached home	50%
Single attached home	15%
Apartment	35%
Left politically oriented	43%
Right politically oriented	35%
No children	55%
Children in household	45%

Made a renovation in their current home
(at any given point in time):



Type of renovations:





The French are motivated by saving money and thermal comfort, but held back by the investments needed and the hazzle

Motivations



Thermal comfort

“Will keep me warm in winter and cool in summer”



Saving money

“Will save me money as I need less energy for heating and electricity”

Barriers



Costs

“I don't want to get a loan”

“I can't afford this”

“I miss financial support from the government”

“I fear a higher rent, if my landlord carries out energy efficient renovations”
(tenants only)



Hassle

“It'll take a lot of my time and effort to organize the renovation”

“I don't know how to find a reliable party to execute these renovations”



The house as a cocoon and making a calculated investment

Many **French** respondents associate housing with the notion of shelter, a nest, a cocoon, protecting them against the stress from their hectic and busy life. Facts and figures proving that the return on investment will be positive reassure them that the renovation will be a good investment.



Costs in general hold them back

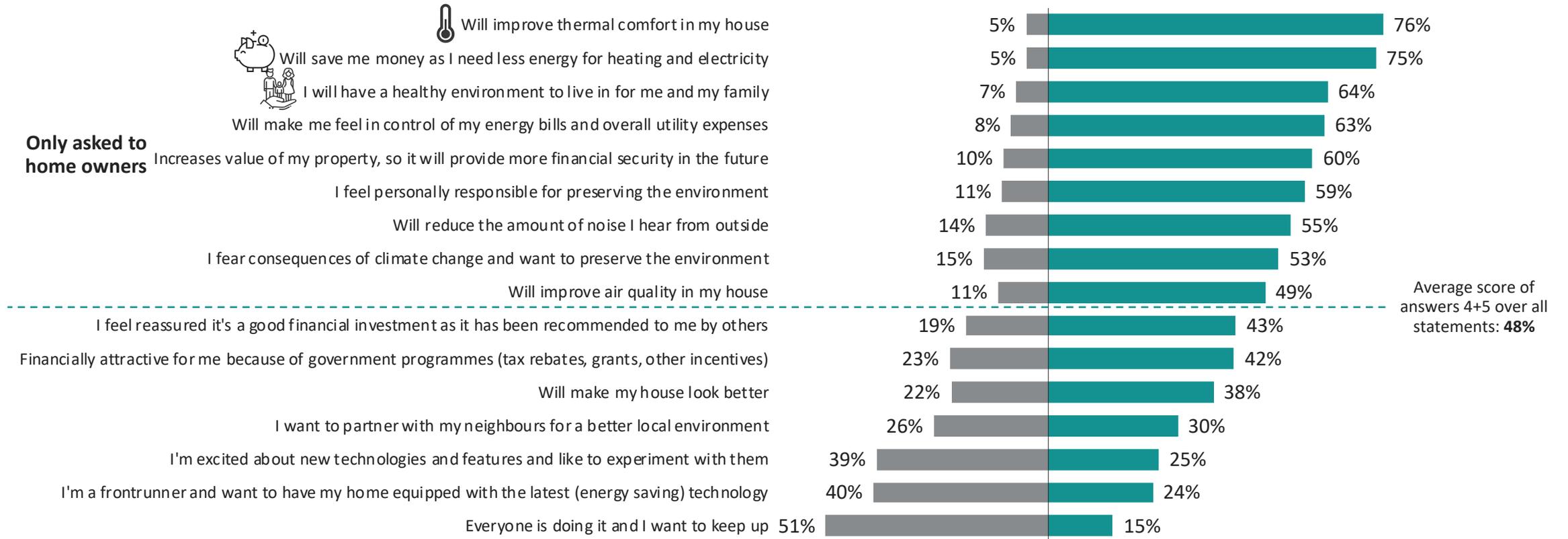
Functional barriers such as costs, but also complexity/feasibility of the works and lack of tax incentives are in the frontline.



Increased thermal comfort and saving money resonate strongly among all

Motivations:

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.

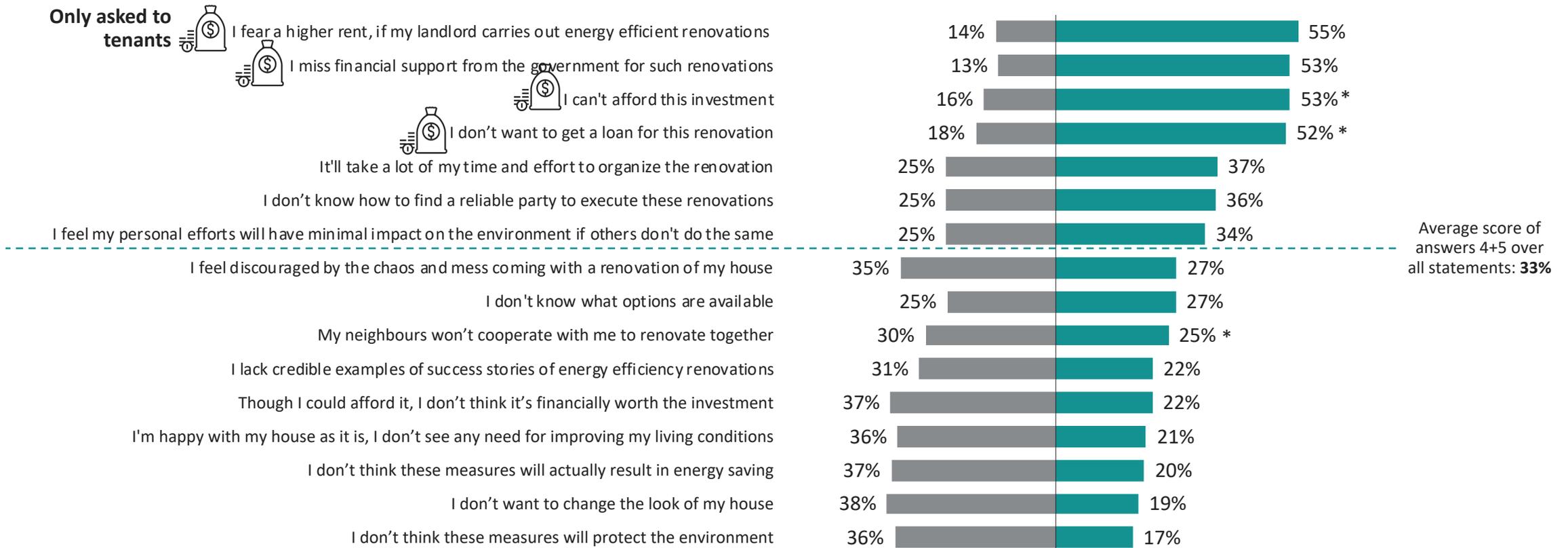
Base: All respondents in France (n=1002)



Not wanting to, or being unable to invest or pay more money is a top barrier

Barriers:

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



*Significantly higher for tenants

Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.

Base: All respondents in France (n=1002)



Motivations and barriers differ between genders, life stages, political orientation, income and urbanization

Motivations



Women like the feeling of being in control of utility expenses and saving money.

Women are also more triggered by improving their quality of living, by improving indoor air quality and a healthy environment.



Men are more interested in the new technology that comes with renovation, because they are excited to experiment with this.



Younger citizens (18-34) are more triggered by wanting to have the latest technology around their house and like to experiment with this.



For citizens aged 55-75 it is even more important to be able to save money and improve thermal comfort with a renovation.



Politically left oriented citizens more often fear the consequences of climate change and want to do something about this.



Politically right oriented citizens are more likely to renovate because they want to improve the looks of their house.



For people living in the city it is more often a motivation to renovate because it reduces noise and improves indoor air quality.

Barriers



Those within the age group of 18-34 lack money to finance the investment. They are also less aware of the possibilities in renovation and how they can find a reliable party to execute this for them.



Citizens living in the cities more often do not make renovations because of the chaos and mess they bring. They also more often think it will cost them too much time and effort.



French tenants more often don't want to renovate because they can't afford it, but also don't want to take a loan. They also more often have neighbours who won't cooperate to renovate together.



Households with a below average income more often can't afford to make a renovation and more often have neighbours who are not willing to cooperate.



Politically right oriented citizens have the tendency of not being open to making energy efficient renovations. They don't think it's worth it, don't believe it will help protect the environment, don't want to change the look of their house and they are just happy with how it is now.

4

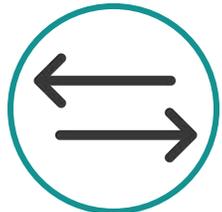
Spain



Most important insights

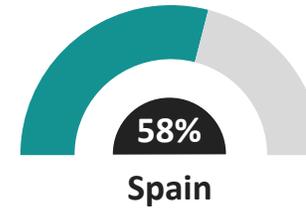


Who we spoke with

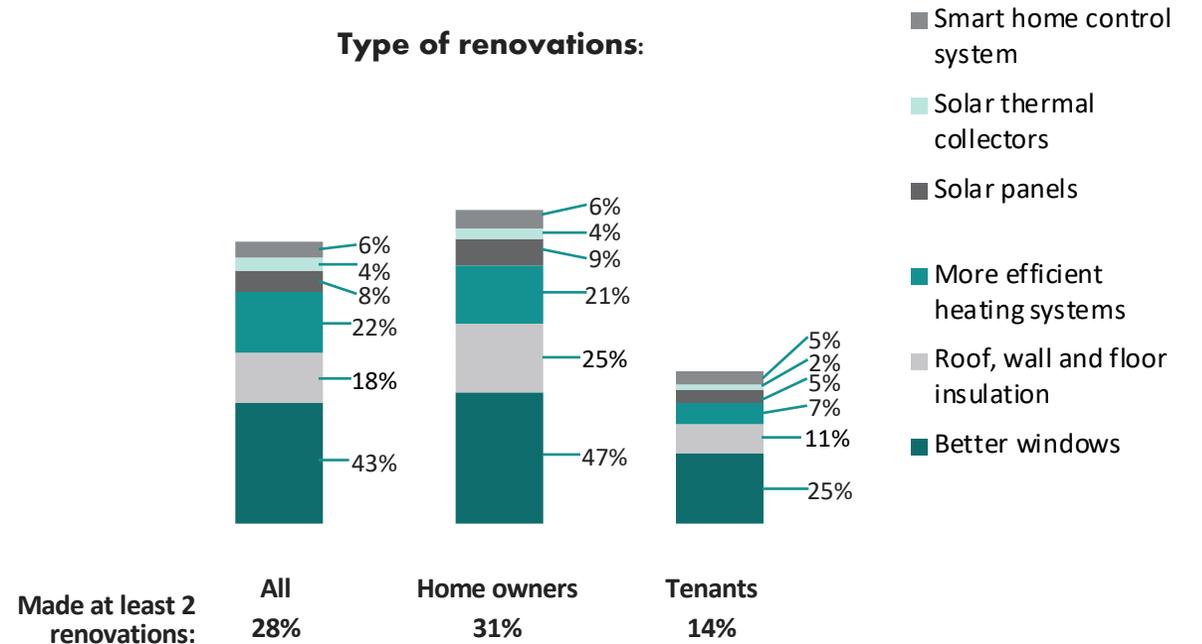


Home owners	82%
Tenants	18%
Single detached home	15%
Single attached home	24%
Apartment	59%
Left politically oriented	57%
Right politically oriented	29%
No children	56%
Children in household	44%

Made a renovation in their current home
(at any given point in time):



Type of renovations:





In Spain there are three big motivators, but only one barrier: money

Motivations



Saving money

“Will save me money as I need less energy for heating and electricity”



Thermal comfort

“Will keep me warm in winter and cool in summer”



Healthy environment

“I will have a healthy environment to live in for me and my family”

Barriers



Costs

“I don't want to get a loan”

“I fear a higher rent, if my landlord carries out energy efficient renovations”
(tenants only)

“I can't afford this”

“I miss financial support from the government”



Qualitative conversations

Renovation provides dual benefits

Next to saving money for their own benefit, the Spanish also show concern about environmental problems. They want to contribute by talking about the subject and doing their own little bit in helping through conscious use of energy.



Qualitative conversations

The strongest barrier is the process of renovating

Perceived as extremely expensive – never knowing the final costs that increase exponentially as renovation occurs. Renovation is a process they'd rather avoid because they feel there are many elements that are beyond their control.

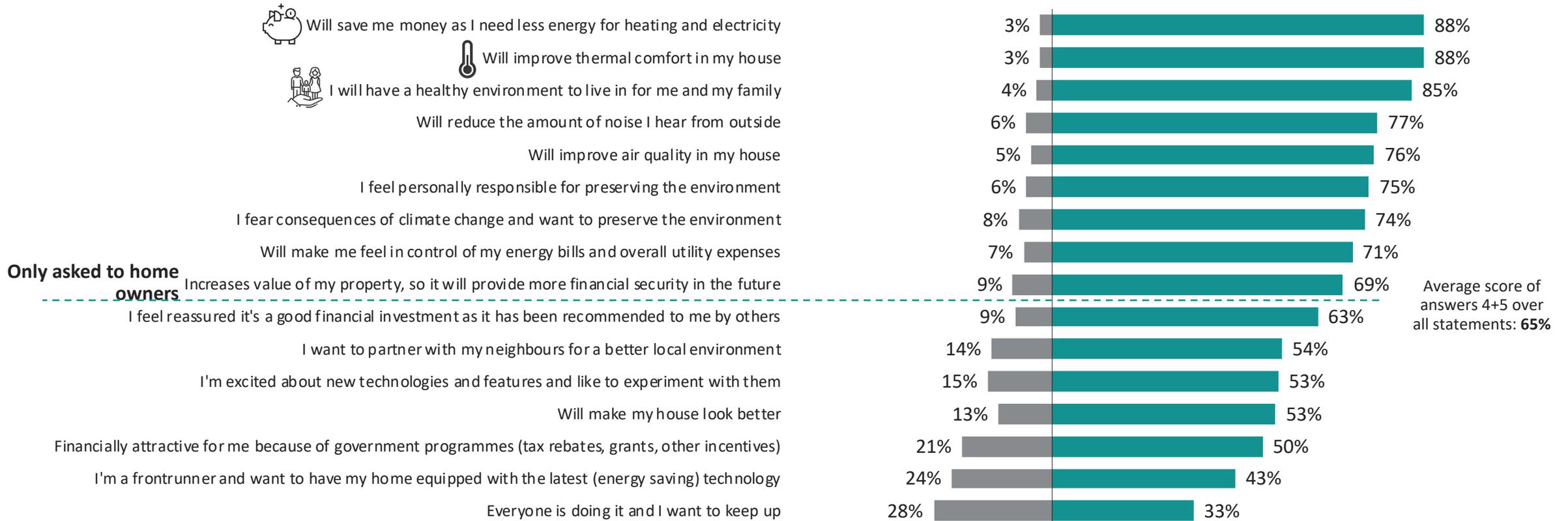


Most important insights - Spain

Saving money, improving thermal comfort and having a healthy environment are the main motivations for Spanish citizens

Motivations:

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.

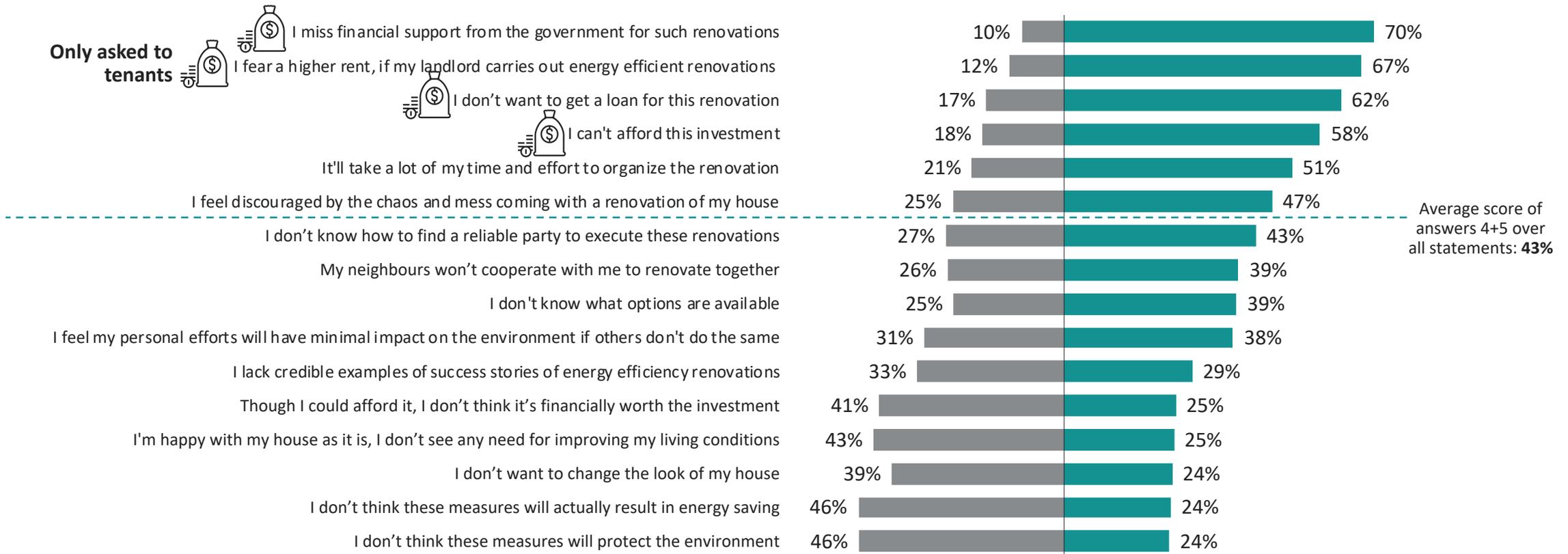
Base: All respondents in Spain (n=1000)



Lack of financial support from the government and other monetary barriers are holding them back. Next to that, hassle is a barrier

Barriers:

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.

Base: All respondents in Spain (n=1000)



Motivations and barriers differ between genders, life stages, political orientation, income and type of home

Motivations



Women fear consequences of climate change and want to do something to preserve the environment.



For citizens aged 55-75 it is even more important to be able improve thermal comfort with a renovation.



For people living in apartments it is more often a motivation to renovate because it reduces noises from the outside.



Households with an above-average income are more often frontrunners. they want their houses to be equipped with the latest technology and like to experiment with this.



Households with children are more motivated to make energy efficient renovations in general.



Politically left oriented citizens are more often triggered by environmental motivations.



Politically right oriented citizens are more likely to renovate because they like to have the latest technology and because they want to keep up with others.

Barriers



Not being able to afford the renovation or wanting to take a loan for it is a bigger barrier for females than for males. The hassle it brings also holds them back.



The younger the citizens are, the less a lack of financial support from the government is a barrier.



Households with a below-average income more often don't want to make renovations because they can't afford them, but also don't want to take a loan.



Politically right oriented citizens have the tendency of not being open to making energy efficient renovations. They don't think it's worth it, think their efforts will have no or minimal environmental impact, they don't want to change the look of their house, and they are just happy with how it is.

5

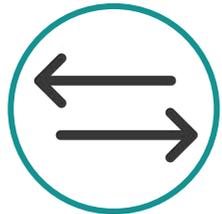
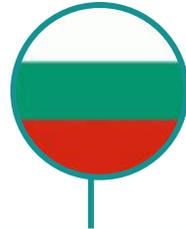
Bulgaria



Most important insights

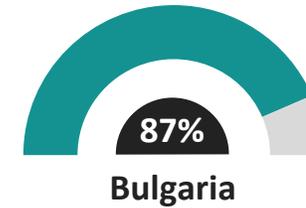


Who we spoke with

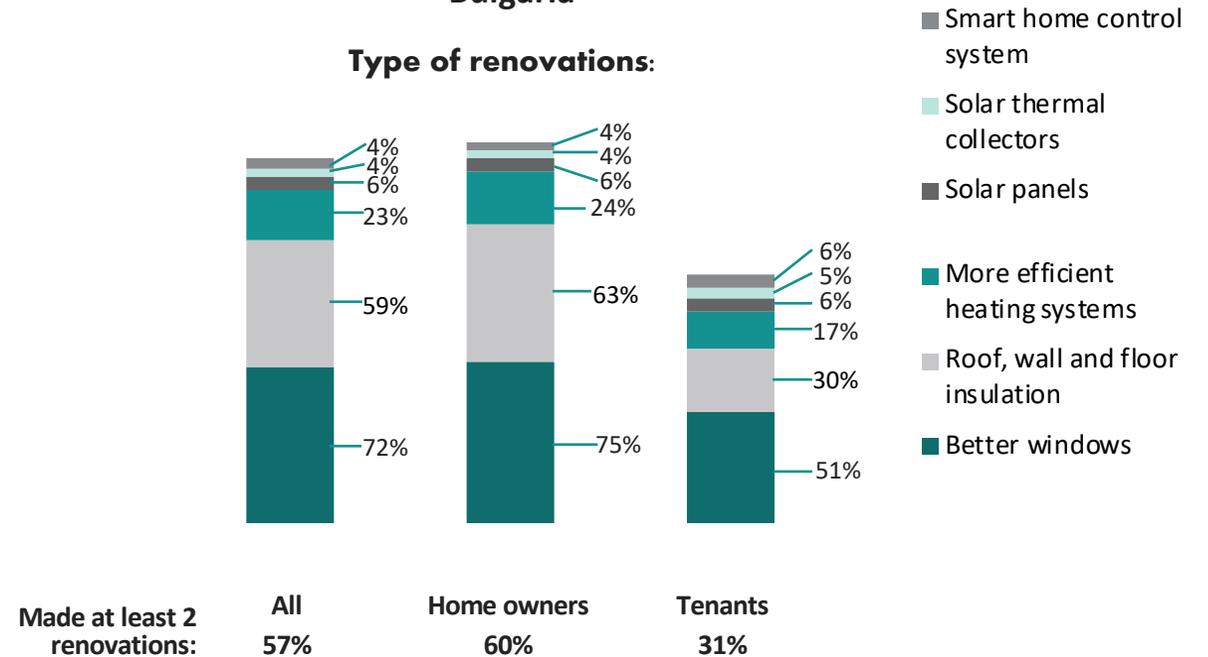


Home owners	89%
Tenants	11%
Single detached home	31%
Single attached home	12%
Apartment	57%
Left politically oriented	31%
Right politically oriented	37%
No children	62%
Children in household	38%

Made a renovation in their current home
(at any given point in time):



Type of renovations:

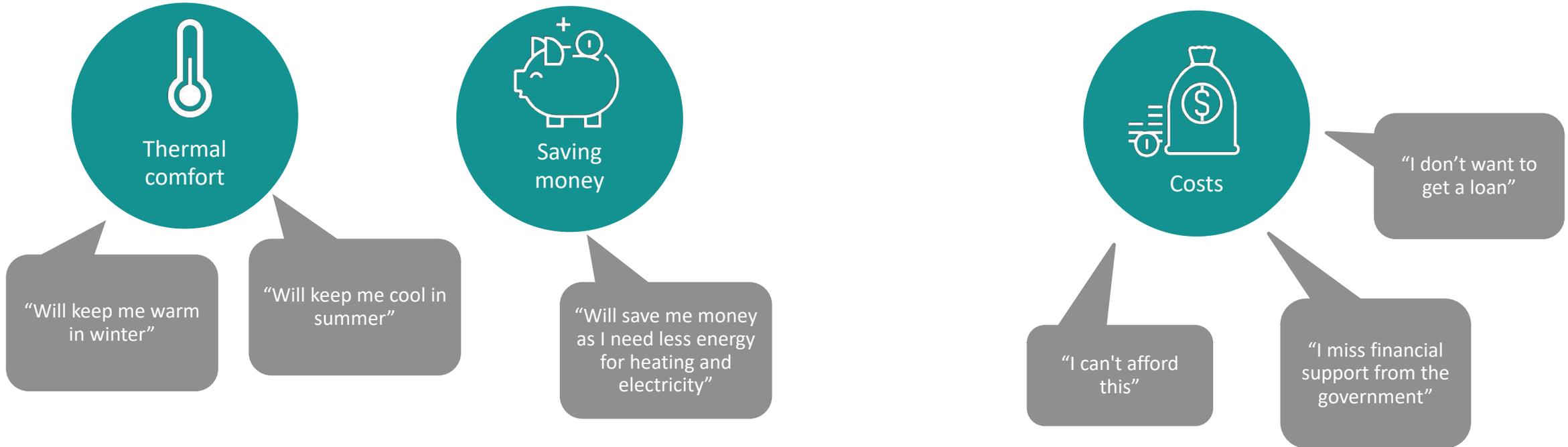




Almost all Bulgarians are willing to renovate if it improves their thermal comfort and save money, but are held back by costs

Motivations

Barriers



Houses are seen as an important base of relations and a place of retreat.

People associate silence and thermal comfort with homes. Good insulation and glazing are elements that correspond to these attributes.



Money is the main reason not to invest in energy efficient solutions.

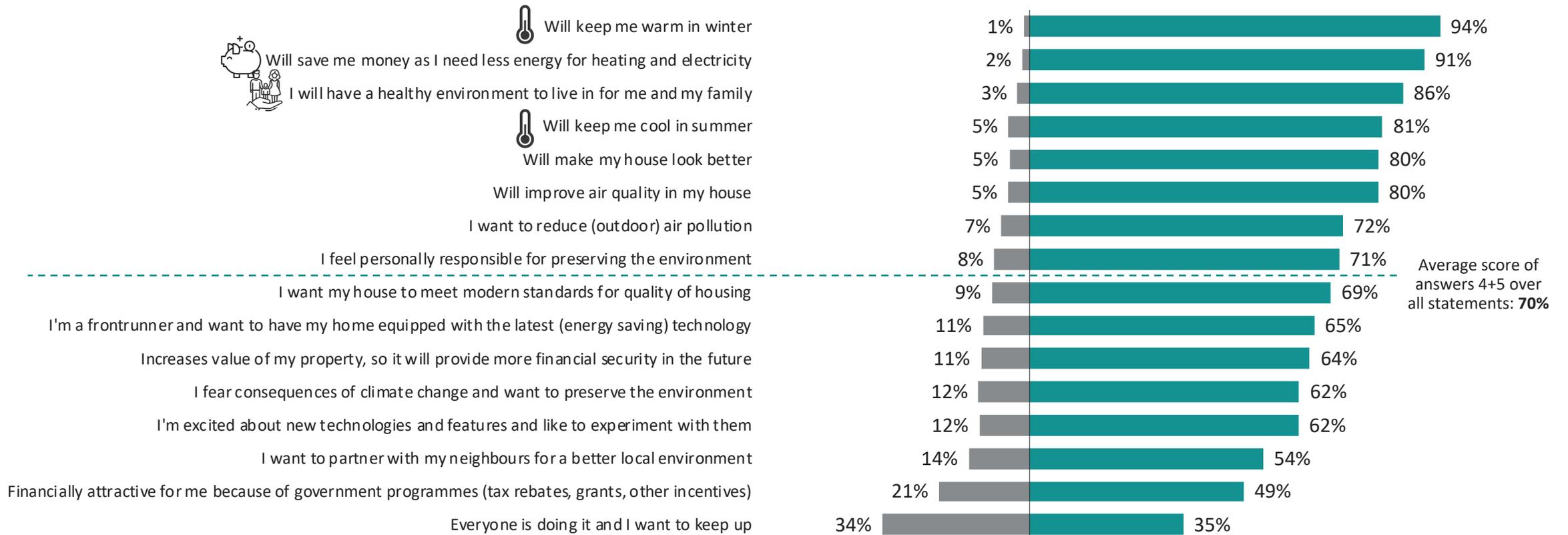
Participants believe that most Bulgarians would like to have an efficient home but lack the means to achieve it. One has to balance renovation against other spending priorities in the household.



Next to thermal conditions and saving money, creating a healthy environment motivates Bulgarians to renovate

Motivations:

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



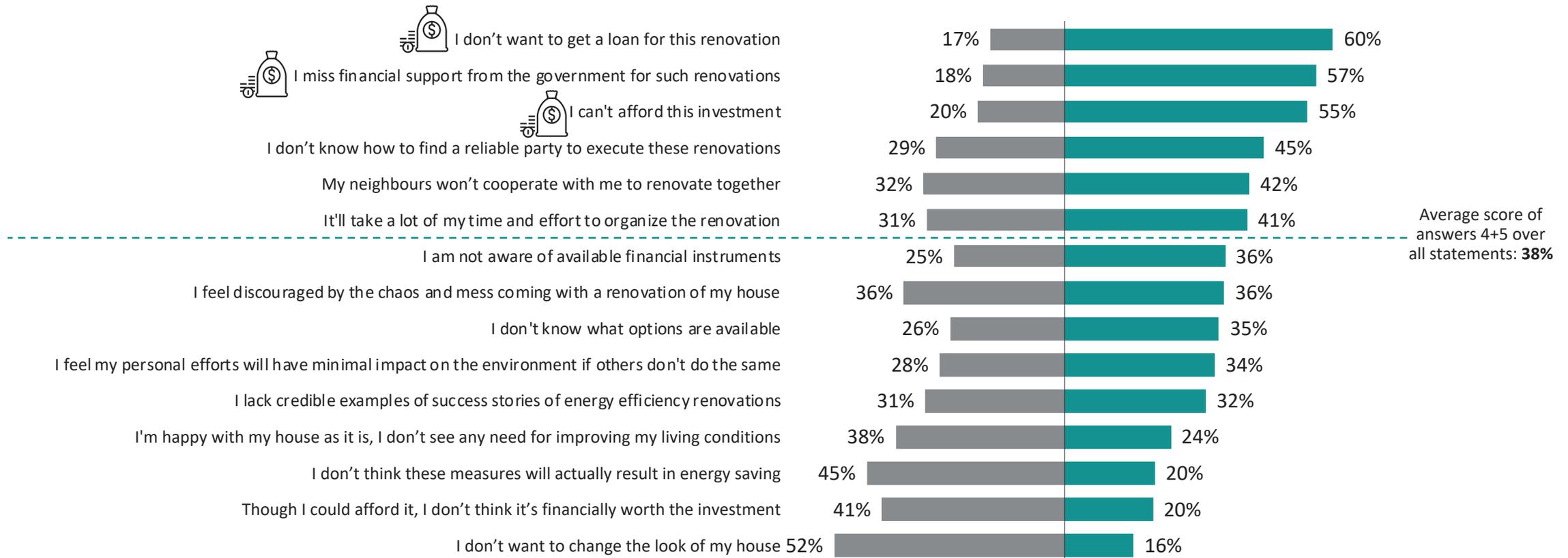
Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.
 Base: All respondents in Bulgaria (n=1001)



Money in general tops the list of barriers in Bulgaria

Barriers:

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.
 Base: All respondents in Bulgaria (n=1001)



Overall, there are not many group differences in motivations and barriers

Motivations



Women score higher on environmental motivations. They more often fear consequences of climate change, feel more responsible for preserving the environment and want better outdoor air quality.



Citizens who live in single detached houses are more motivated to renovate in order to make their house look better.



Politically right oriented citizens are more likely to renovate because they like to have the latest technology and like to experiment with this. They are more motivated to make their house meet the modern standards of housing.

Barriers



Women more often indicate that they are not able to afford the renovation.



Citizens living in the cities more often do not make renovations because their neighbours are not willing to cooperate. The same applies to those living in apartments.



Households with a below average income more often don't want to make renovations because they can't afford them, but also don't want to take a loan. They also lack financial support from the government.

6

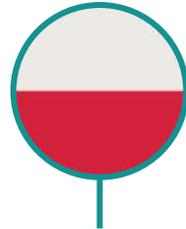
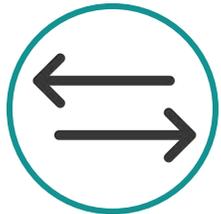
Poland



Most important insights



Who we spoke with

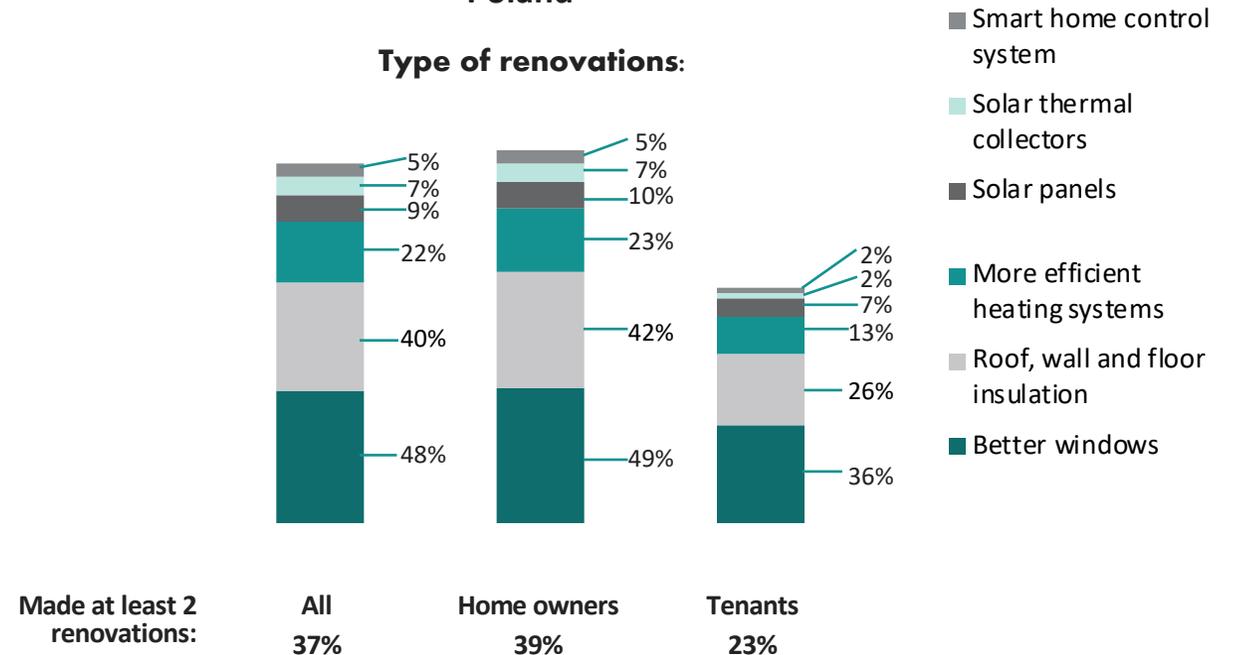


Home owners	87%
Tenants	13%
Single detached home	34%
Single attached home	6%
Apartment	60%
Left politically oriented	43%
Right politically oriented	35%
No children	54%
Children in household	46%

Made a renovation in their current home (at any given point in time):



Type of renovations:

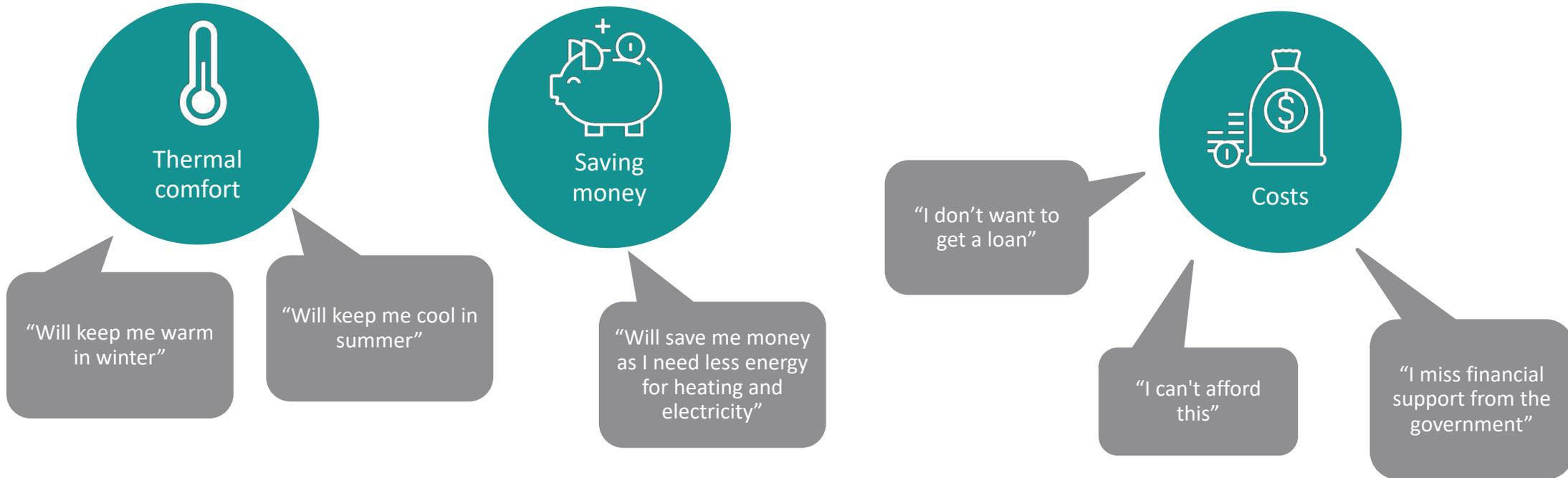




Almost all Polish citizens are motivated by improving thermal comfort and saving money, but can't or won't make the investment

Motivations

Barriers



Houses are seen as an important base of relations and a place of retreat.

People associate silence and thermal comfort with homes. Good insulation and glazing are elements that correspond to these attributes.



Renovation evokes many negative associations and fears.

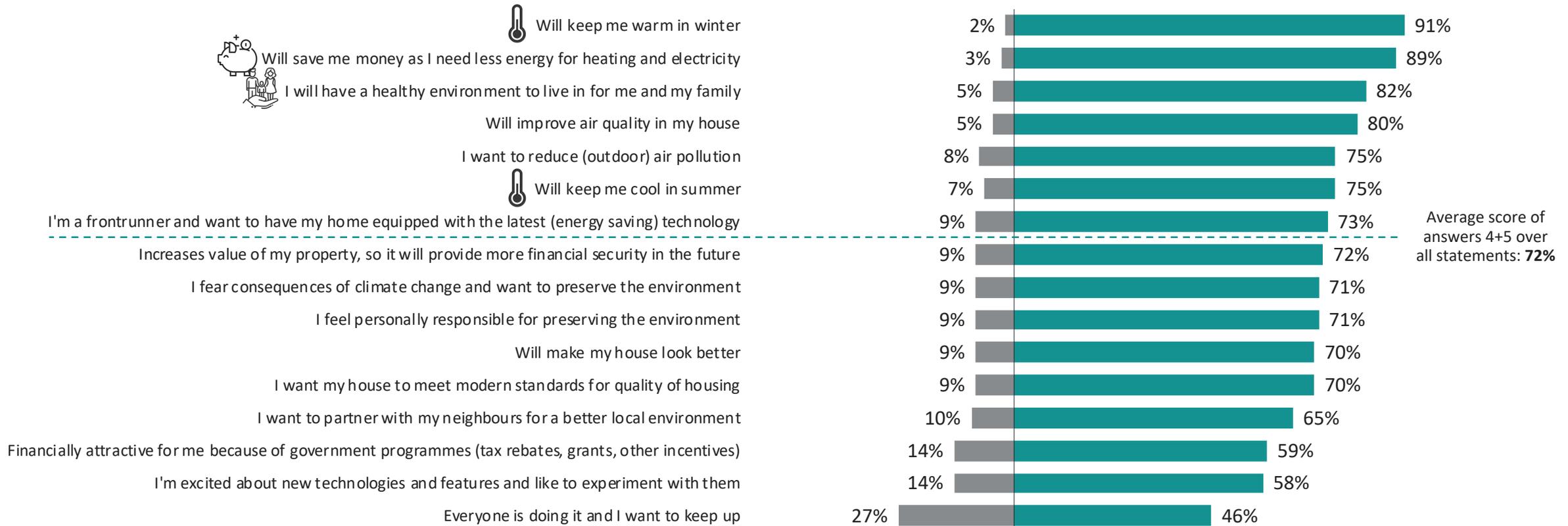
Citizens fear high cost of labour and materials. Renovation sometimes requires them to take a loan and sometimes also leads to additional, unexpected expenses.



Improving thermal comfort in the winter and saving money are especially important for Polish citizens

Motivations:

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



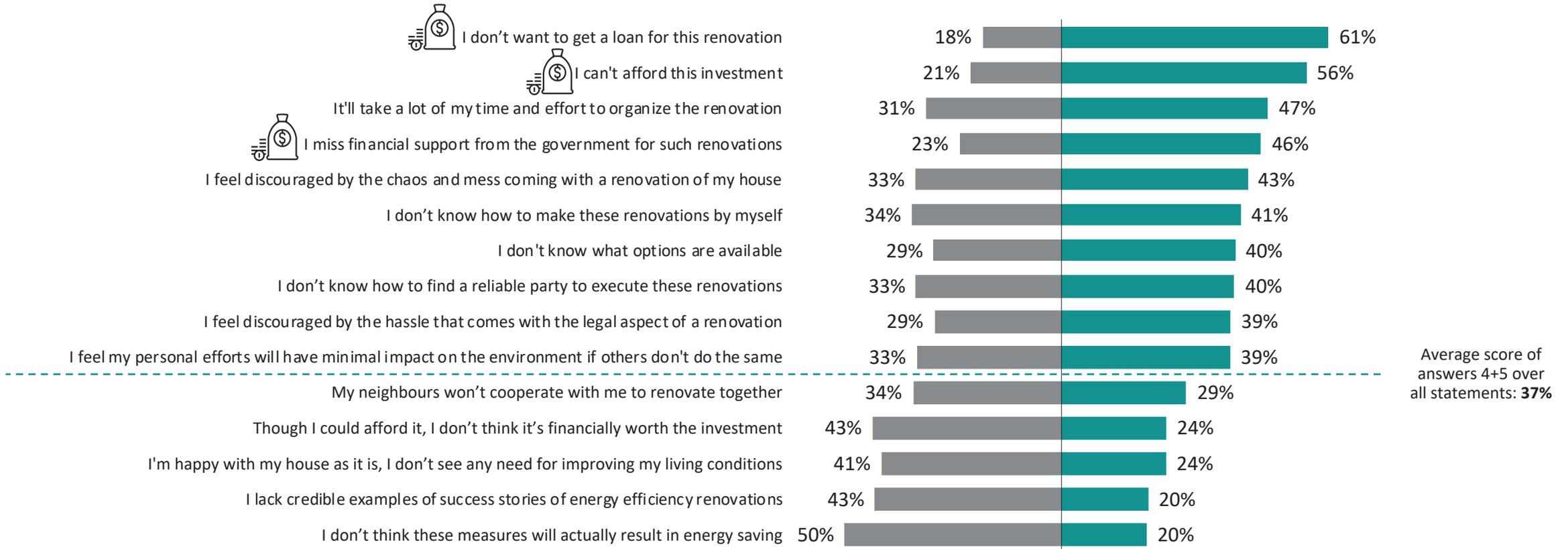
Question: Please indicate to what extent each of the following would be/has been a motivation for you to make energy efficient renovations around your house.
 Base: All respondents in Poland (n=1000)



Not being able to afford a renovation and taking a loan for it are the main barriers in Poland. Also, lack of knowledge hold them back

Barriers:

Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



Question: Now please indicate to what extent each of the following is/has been a barrier for you to make energy efficient renovations around your house.
 Base: All respondents in Poland (n=1000)



Motivations and barriers differ between genders, life stages, political orientation, income and type of house

Motivations



Women score higher on environmental motivations. They more often fear consequences of climate change and feel more responsible for preserving the environment.

Women are also more triggered by improving their quality of living, by improving indoor air quality and a healthy environment.



Citizens aged 55-75 are more likely to be motivated because everyone is doing it. They are also more motivated to renovate in order to make their house look better.



Citizens who live in single detached houses are more motivated in general. The same applies to higher income households.



Politically left oriented citizens are more often triggered by keeping themselves warm in winter.



Politically right oriented citizens are more likely to renovate because everyone is doing it and they want to keep up.

Barriers



Women are more often triggered to make renovations, but they also score higher on some main barriers: money is even a bigger barrier for women and also the hassle and lack of knowledge hold them back.



Those within the age range of 18-34 tend not to want to take a loan and lack awareness about how to approach the process of renovation.



Citizens living in the cities are more often held back by the hassle that comes with a renovation, or don't know how to find a reliable party. The same applies to citizens living in apartments.



Households with a below average income more often lack the knowledge on what options are available.



Politically right oriented citizens have the tendency of not being open to making energy efficient renovations. They don't think it's worth it, are discouraged by the hassle, don't want to change the look of their house, and they are just happy with how it is.

Appendix

Research set-up



Research set-up

Main question of the study: What motivations show most potential to enhance engagement of European citizens to support energy efficient renovations?

Step 1 Qualitative research

To explore the functional and emotional motivations and the barriers that citizens hold when it comes to net zero emission buildings



Focus group discussions (120min)

- 2-4 focus groups per country of 2 hours with 6 participants in each group. Two groups with home owners and in some countries (Germany, France, Spain) 1-2 groups with tenants.



Demographics

- Mix in gender, life stages, age
- Mix in single family homes / multiple family homes
- All pay for their own rent or mortgage, and live in this property (no landlords)
- All are personally responsible for making decisions about their house
- Mix in political opinions, no extreme opinions when it comes to environmental solutions

Step 2 Quantitative research

To validate the motivations and barriers found in the qualitative research.



Online survey

- n=1000 citizens per country (Representative)
- n=2000 in Germany with n=1000 home owners and n=1000 tenants
- Age 18-75, the sample is nationally representative
- Fieldwork was conducted between November 16 and November 28, 2018



Questionnaire (5 min)

- Questions on socio-demographics and other background are the same across all the countries
- While the majority of the motivations and barriers tested were common across all countries, a few country-specific statements were also tested.

Overview of set-up qualitative research



Focus group discussions (120min)

- 2-4 focus groups per country of 2 hours with 6 participants in each group. Two groups with home owners and in some countries (Germany, France, Spain) 1-2 groups with tenants.
- Focus group discussions have been executed in July and August 2018
- The discussion covered:
 - Getting to know the participants and their living situation
 - Understanding the participants' cultural values, perceptions and attitudes regarding homes in general, including also a deep dive into the motivations, needs and perceptions around energy efficient homes
 - Uncovering the four layers of participants' triggers and barriers for renovating homes to make them more energy efficient, including emotional benefits, personality, social identity and functional characteristics
 - Testing the participants' reactions to statements on energy efficient buildings related to health, well-being/productivity and community/society.

Country	City	Target: Home owners	Target: Tenants
Germany	Berlin	2 focus groups	2 focus groups
France	Paris	2 focus groups	2 focus groups
Poland	Warsaw	2 focus groups	-
Spain	Madrid	2 focus groups	1 focus group
Bulgaria	Sofia	2 focus groups	-

Appendix

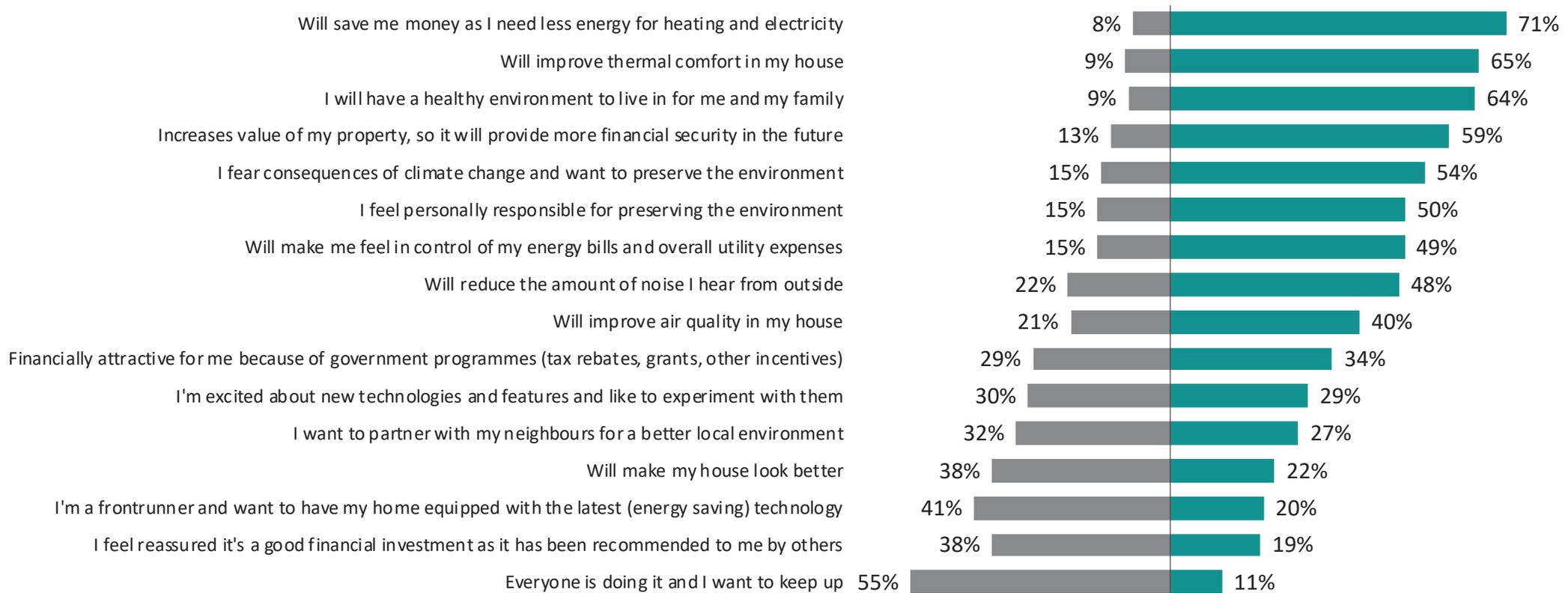
Additional interesting insights





Motivations – Germany: home owners

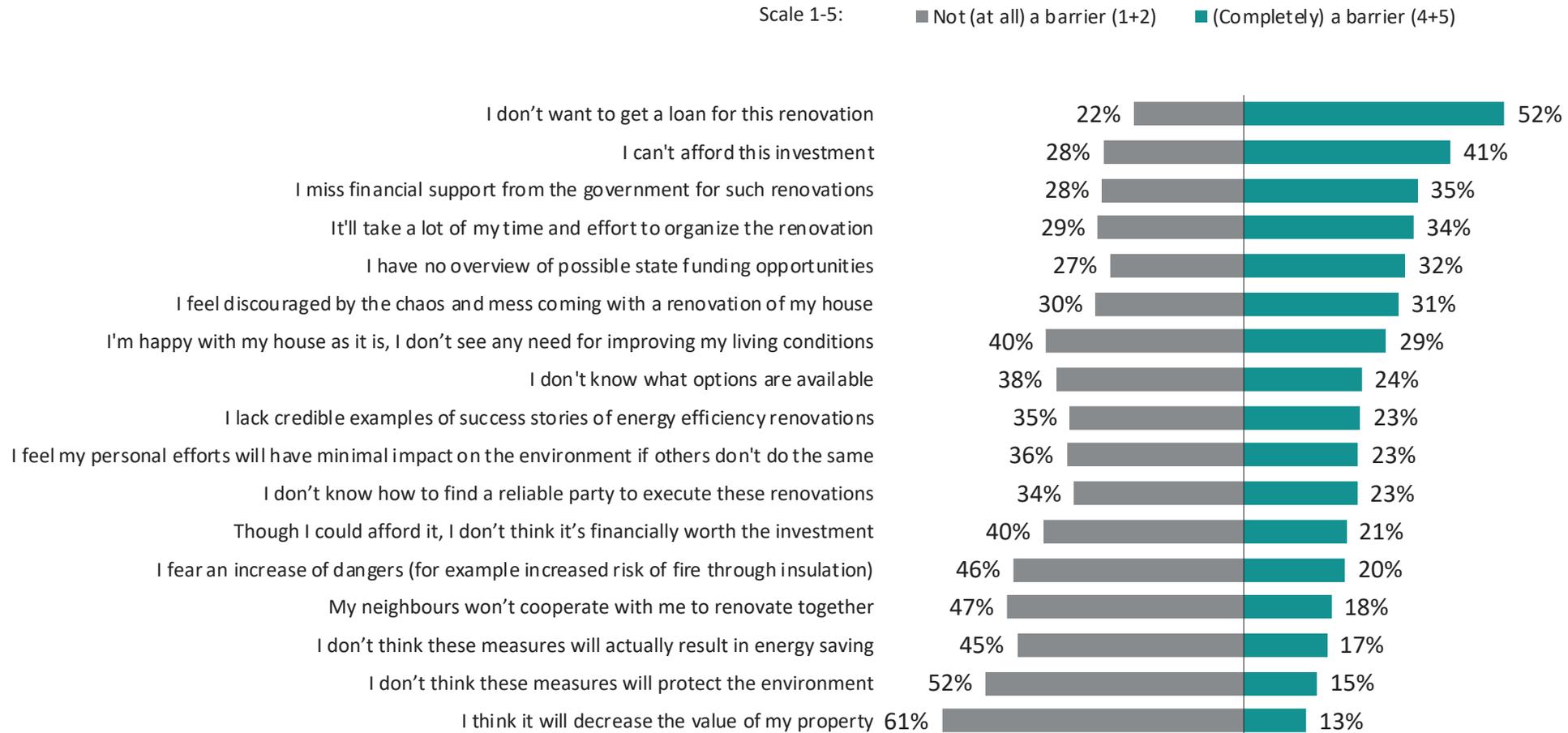
Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



Question: Bitte geben Sie an, wie sehr folgende Punkte Sie motiviert haben/würden, eine energetische Sanierung Ihres Hauses durchzuführen.
Base: All home owners in Germany (n=1001)



Barriers – Germany: home owners

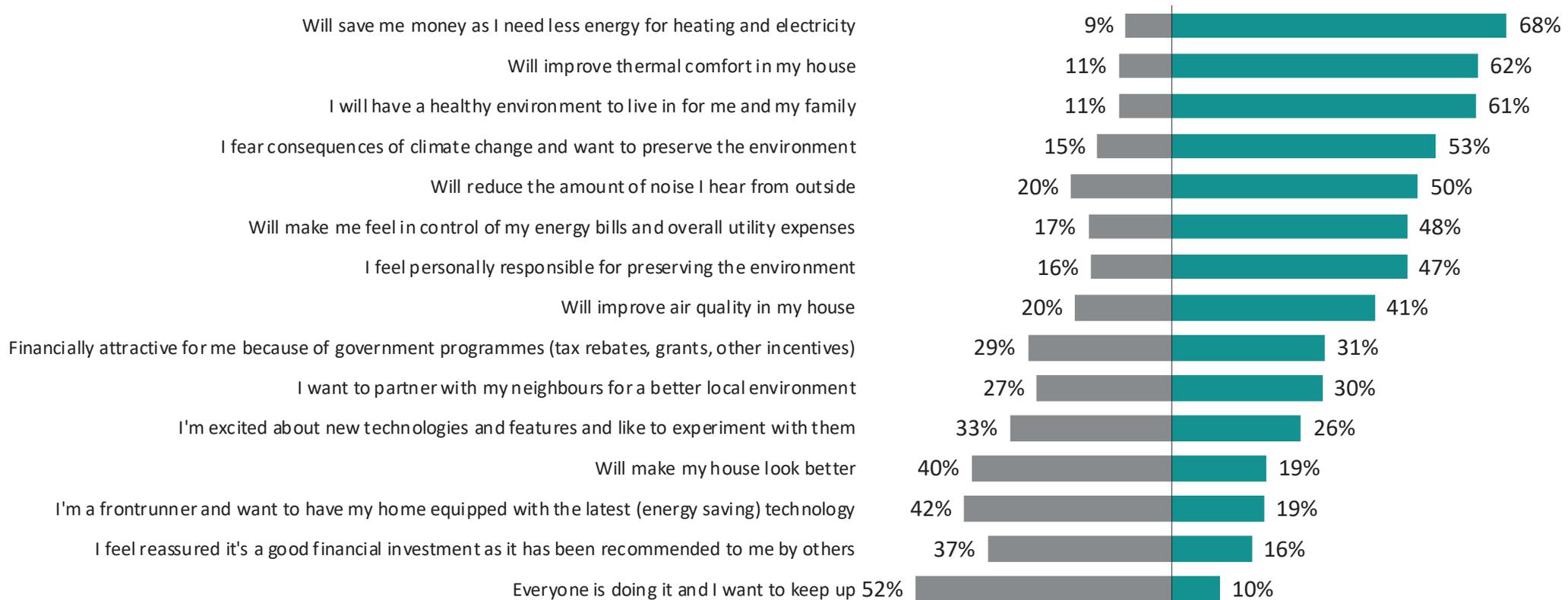


Question: Bitte geben Sie jetzt an, wie sehr folgende Punkte Sie davon abhalten/abgehalten haben, eine energetische Sanierung Ihres Hauses durchzuführen.
Base: All home owners in Germany (n=1001)



Motivations – Germany: tenants

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)

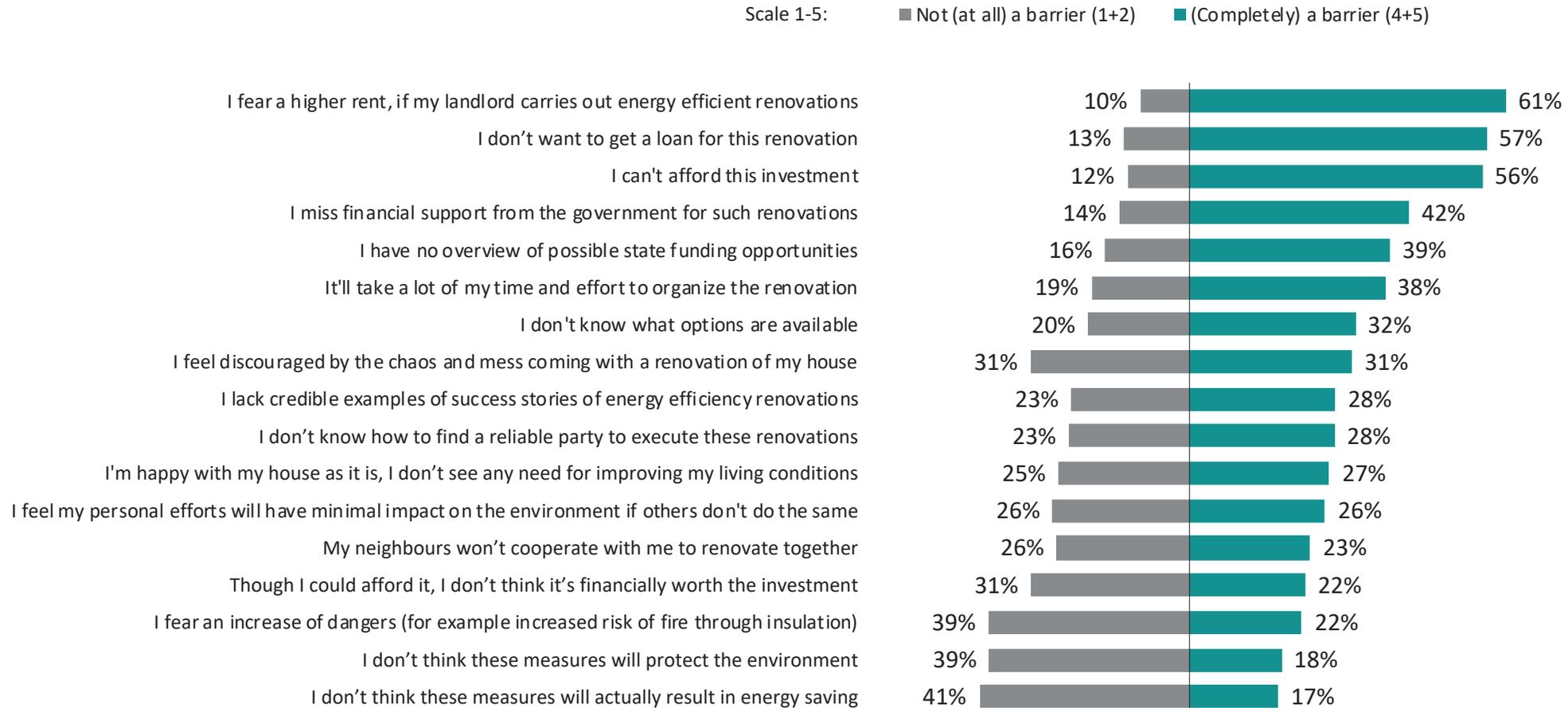


Question: Bitte geben Sie an, wie sehr folgende Punkte Sie motiviert haben/würden, eine energetische Sanierung Ihres Hauses durchzuführen oder Ihre/-n Vermieter/-in darum zu bitten.

Base: All tenants in Germany (n=1000)



Barriers – Germany: tenants



Question: Bitte geben Sie jetzt an, wie sehr folgende Punkte Sie davon abhalten/abgehalten haben, eine energetische Sanierung Ihres Hauses durchzuführen oder Ihre/-n Vermieter/-in darum zu bitten?

Base: All tenants in Germany (n=1000)

Appendix

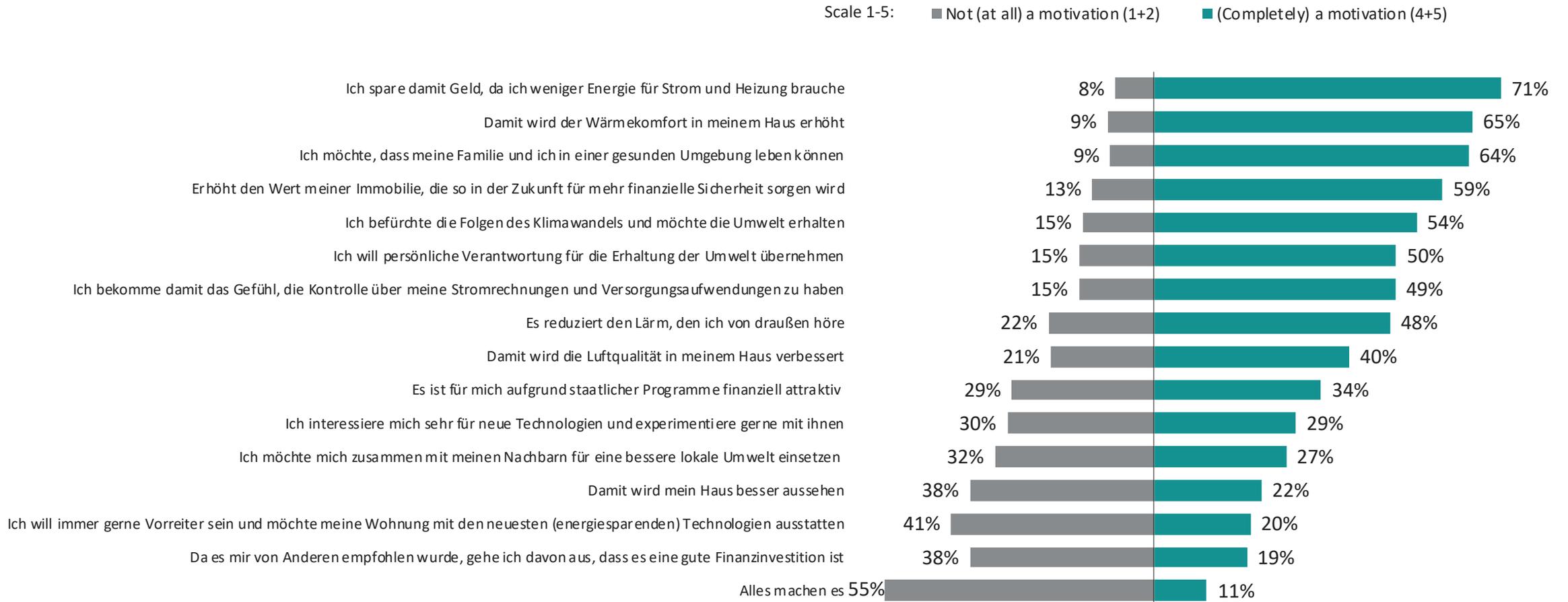
Local translations of the motivations and barriers



Motivations - Germany



Total



Question: Bitte geben Sie an, wie sehr folgende Punkte Sie motiviert haben/würden, eine energetische Sanierung Ihres Hauses durchzuführen.

Base: All respondents in Germany (n=2001)

Barriers - Germany

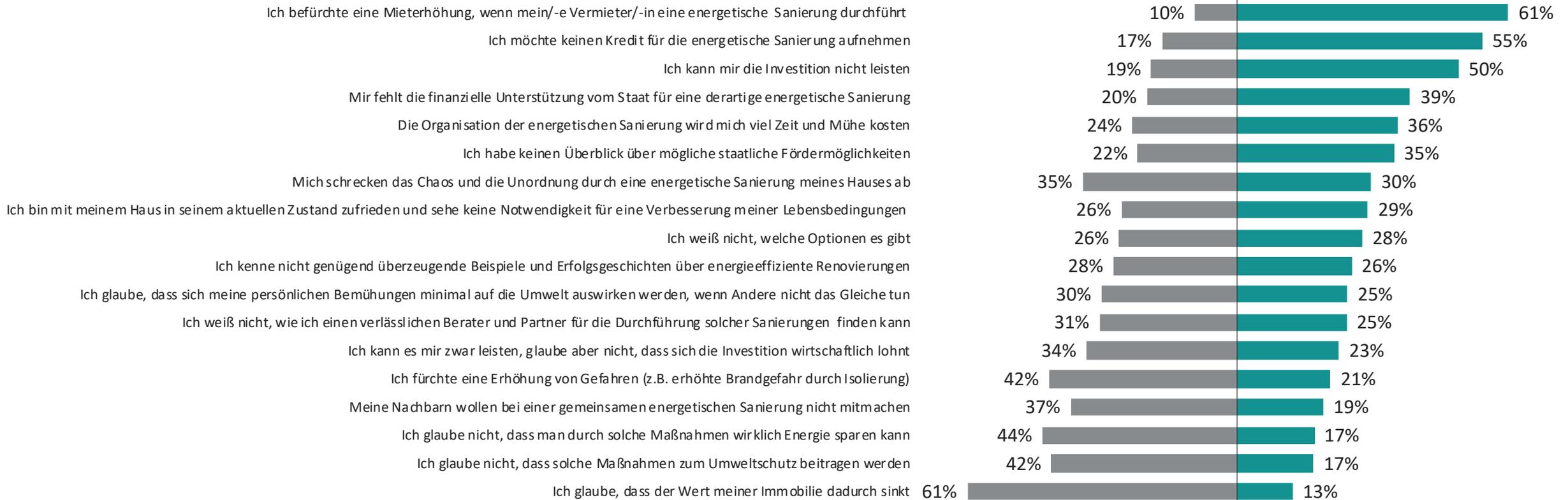


Total

Scale 1-5:

■ Not (at all) a barrier (1+2)

■ (Completely) a barrier (4+5)

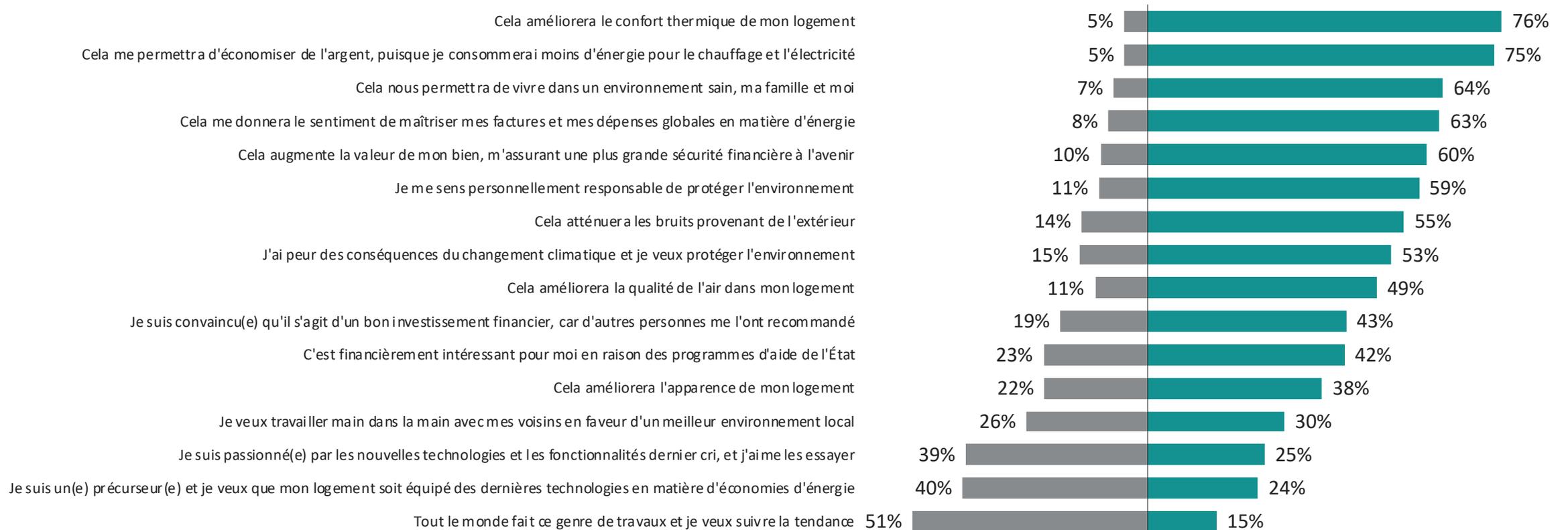


Question: Bitte geben Sie jetzt an, wie sehr folgende Punkte Sie davon abhalten/abgehalten haben, eine energetische Sanierung Ihres Hauses durchzuführen.
 Base: All respondents in Germany (n=2001)



Motivations - France

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



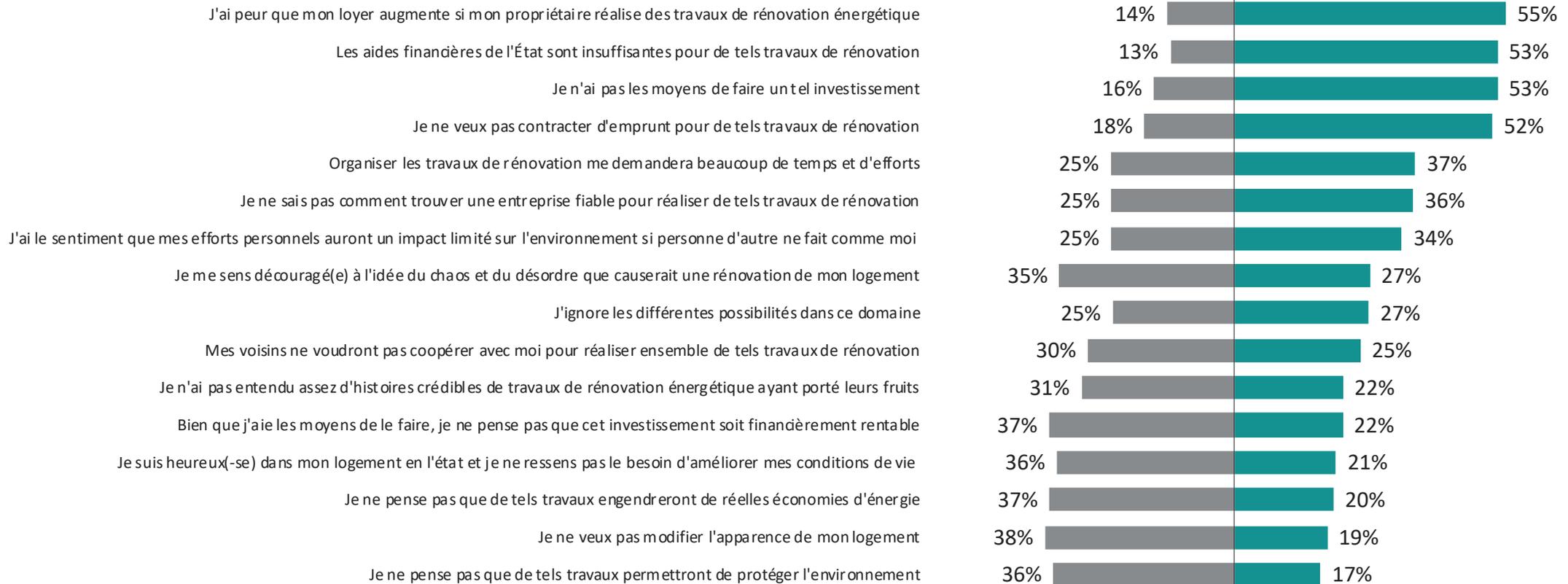
Question: Veuillez indiquer dans quelle mesure chacun des éléments suivants constituerait/constitué une motivation pour réaliser des travaux de rénovation énergétique dans votre logement.

Base: All respondents in France (n=1002)

Barriers - France



Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



Question: À présent, veuillez indiquer dans quelle mesure chacun des éléments suivants (a) représente un obstacle pour réaliser des travaux de rénovation énergétique dans votre logement.

Base: All respondents in France (n=1002)



Motivations - Spain

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



Question: Indique en qué medida cada una de las siguientes opciones le motivaría/ha motivado a realizar reformas de rendimiento energético en su vivienda.
Base: All respondents in Spain (n=1000)

Barriers - Spain



Scale 1-5: ■ Not (at all) a barrier (1+2) ■ (Completely) a barrier (4+5)



Question: Indique en qué medida cada una de las siguientes opciones constituye/ha constituido una barrera para que realice reformas de rendimiento energético en su vivienda.

Base: All respondents in Spain (n=1000)



Motivations - Bulgaria

Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)



Question: Моля, посочете до каква степен всяко от следните би било мотивация за Вас да извършите ремонти за енергийна ефективност в дома Ви.
 Моля, посочете до каква степен всяко от следните е било мотивация за Вас да извършите ремонти за енергийна ефективност в дома.
 Base: All respondents in Bulgaria (n=1001)

Barriers - Bulgaria



Question: Сега, моля, посочете до каква степен всяко от следните е пречка за Вас да извършите ремонти за енергийна ефективност в дома Ви.

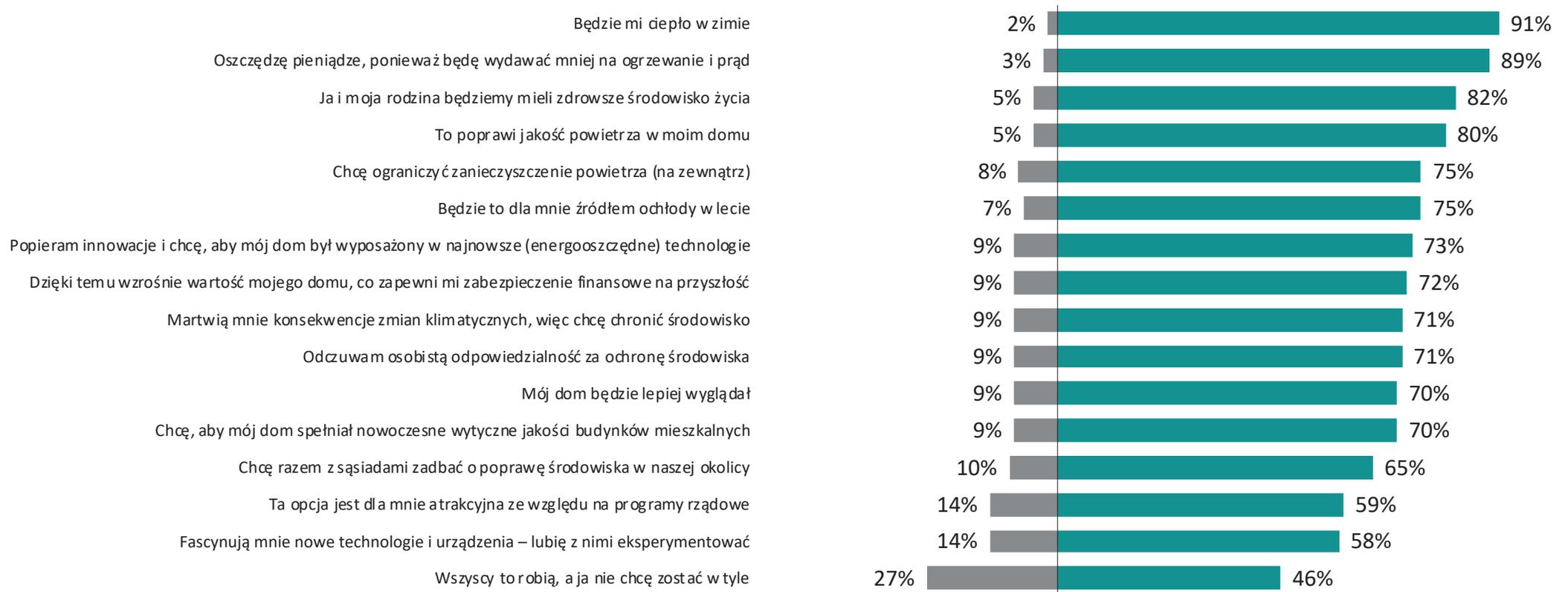
Сега, моля, посочете до каква степен всяко от следните е било пречка да извършите ремонти за енергийна ефективност в дома Ви.

Base: All respondents in Bulgaria (n=1001)

Motivations - Poland



Scale 1-5: ■ Not (at all) a motivation (1+2) ■ (Completely) a motivation (4+5)

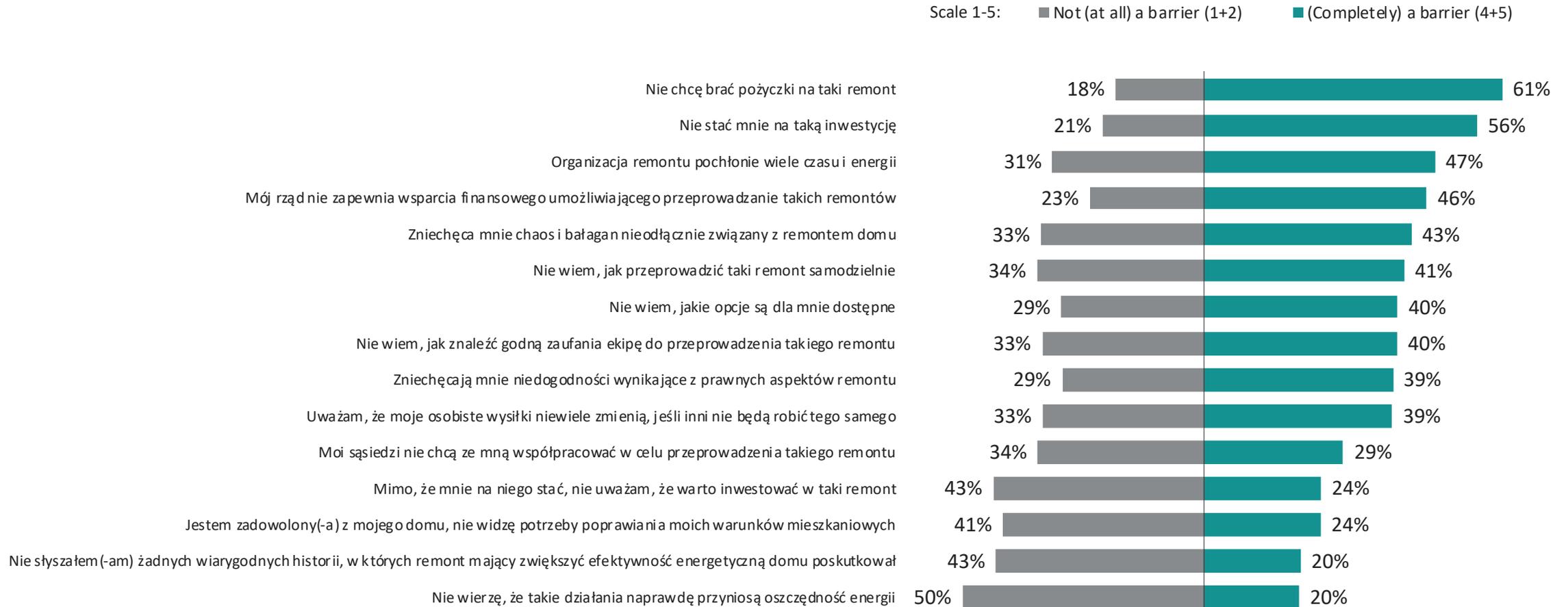


Question: W jakim stopniu każde z poniższych byłoby dla Pana/Pani motywacją, aby przeprowadzić remont zwiększający efektywność energetyczną Pana/Pani domu?

W jakim stopniu każde z poniższych było dla Pana/Pani motywacją, aby przeprowadzić remont zwiększający efektywność energetyczną Pana/Pani domu?

Base: All respondents in Poland (n=1000)

Barriers - Poland



Question: Teraz proszę zaznaczyć, w jakim stopniu każde z poniższych powstrzymuje Pana/Panią przed tym, aby przeprowadzić remont zwiększający efektywność energetyczną Pana/Pani domu?
 Teraz proszę zaznaczyć, w jakim stopniu każde z poniższych powstrzymywało Pana/Panią przed tym, aby przeprowadzić remont zwiększający efektywność energetyczną Pana/Pani domu?
 Base: All respondents in Poland (n=1000)