

Homeowners' fears, motivations, drivers and obstacles to energy renovations - the results of RenoHUb project's market research

Fanni SÁFIÁN
Hungarian Energy Efficiency Institute
safian@mehi.hu
<http://mehi.hu>



HUNGARIAN ENERGY
EFFICIENCY INSTITUTE
MEHI / HUNEFF



This project has received funding from the European Union's Horizon 2020 Secure, clean and efficient energy programme under Grant Agreement No 845652

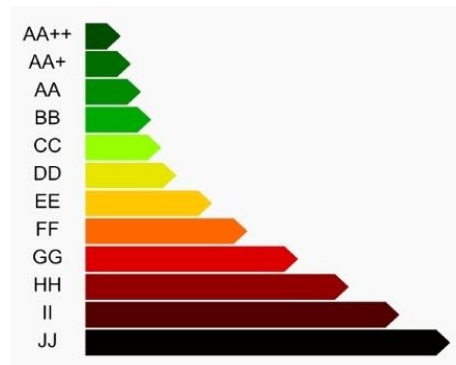
Background



Hungarian situation



- Energetically outdated Hungarian building stock with high energy consumption (average: 250 kWh/m²/a)
- Huge potential for energy savings
- Very low (<1% / year) deep renovation rate



The RenoHUb project in numbers

Who are we?



- Horizon 2020 project consisting exclusively of Hungarian consortium members
- 3 years long (November 2019 - November 2022)
- 5 Hungarian consortium partners
- 7 work packages

RenoHub project aims

- Trigger an upscale of the energy retrofits through **adopting the one-stop-shop (OSS) concept in Hungary** by developing of an integrated business model
- The OSS service called **RenoPont** targets all homeowners (family houses and multi-apartment flats) in Hungary.
- The pillars of the OSS service: an **online platform** and **two offices** (after 5 years: 15)



Research on homeowners motivations, drivers and obstacles – **methods**



Research objectives

Why is the renovation rate so low and how could be higher?

1. the **fears and obstacles** to energy efficiency improvement projects
2. the **drivers and triggers** of energy efficiency improvement projects
3. the **evaluation of the two main components of our OSS** concept: the offices and the online platform



Research methods

Our research partner was **KANTAR HOFFMANN**, who outlined for us:

- ✓ 3 days of online blogs
- ✓ 4 focus group interviews

Which was extended by us (RenoHub consortium) with:

- ✓ 14 in-depth interviews with relevant stakeholder groups



Online blog

- continuously-moderated, 3-day discussion using a diary technique



SZQ2
Utanajárás

Ezek a kérdések a felújítás előkészítésére vonatkoznak, egészen addig a pontig, amíg ténylegesen elkezdődött a munka.

Mi volt az első lépés a döntést követően? **Hogyan vágtatok bele a felújításba a gyakorlatban?** Kérlek, oszd meg velünk minél pontosabban ezt a folyamatot egészen addig a pontig, hogy elkezdődött a munka.

- Utánajárás támogatási lehetőségeinek, pályázatoknak? Ha igen: hol, honnan halottál ezekről, és hol néztél utána? Ha nem: miért nem?
- Hol, hogyan kerestél kivitelezőt? Milyen szempontok alapján választottad?
- Milyen költségekkel kalkulált? Mennyire voltak rugalmas?
- Mennyire játszott szerepet az időközben az adott évszak? Vagy bármilyen más, hasonlóan változó szempont?
- Hogy kalkulált, mennyi időt fog igénybe venni a felújítás?

Azaz: mi minden történt, mi mindennel kellett foglalkoznod, minek kellett utánajárnod egészen addig, amíg elkezdődött a felújítás?

Voltak buktatók, nehézségek, bármi, ami kényelmetlenséget, problémát okozott már akkor, amikor még el sem kezdődött a felújítás?

És találkoztál olyan megoldással, ami viszont **példáértékű**, amit másnak is ajánlánd?

 **Rugina**
3/12/21, 8:28 AM

Ujrat **halk** **családi ház** **30 felett** **szigetelés** **nyitak**

A felújítás, építésztervezés állapot már elméletben megterveztem. Ez után jött a gyakorlati megvalósítás, legalábbis annak a kezdete.

Mivel mindenki szeretné a lehető legkevesebb költségből megvalósítani álmát, ezért nekem is eszembe jutott, hogy körbenézzek, milyen módon lehet plusz anyag.

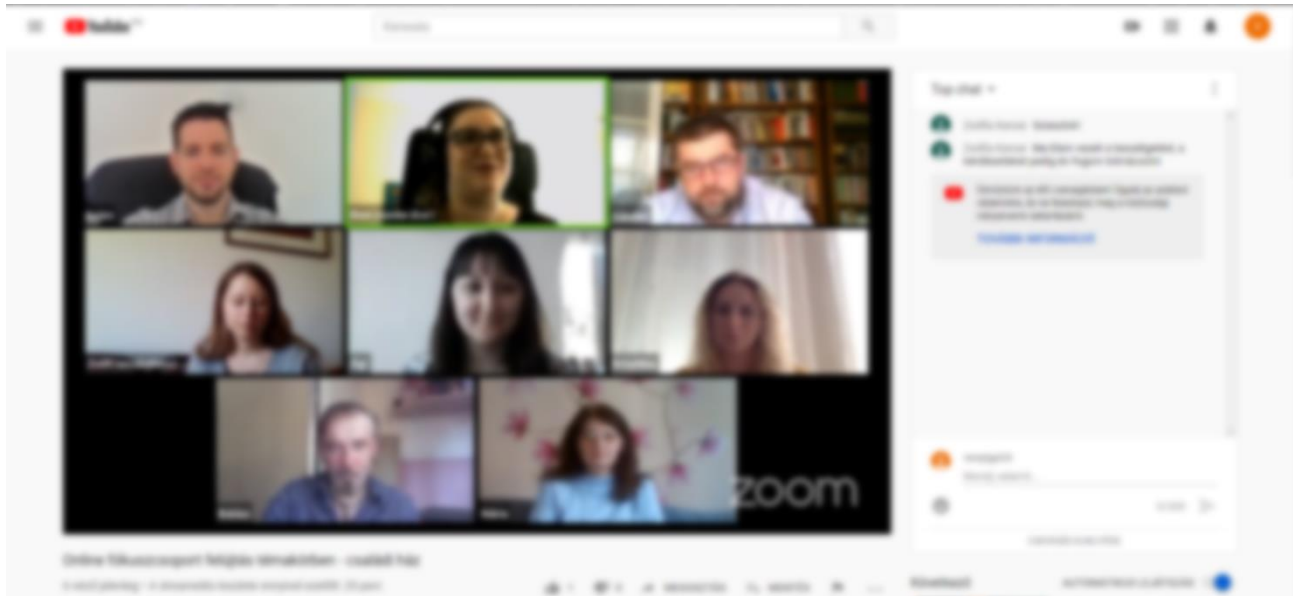
Szerencsére néhány éve, amikor még nyitva volt a lehetőség, lakócaszsa szerződést kötöttem. Ennek lejárata szerencsés módon a burkolás idejére esett.

A pályázatokon is gondolkodtam, azonban a nyitva lévő pályázat lehetőséget már korábban felhasználtam, ezért ez nem jöhetett számításba számomra.



online focus group discussions

- evaluation and improvement of the one-stop-shop concept



Stakeholder in-depth interviews

5 contractor (self-employed or company):

- general contractor company (countryside), general contractor in single-family segment, water, gas and heating system technician (self-employed), self-employed contractor in insulation segment

4 manufacturer companies:

- market leader domestic furnace manufacturer, manufacturer of insulating products, market leader company in building engineering, market leader premium building engineering company

2 common representatives:

- In a city of 20,000 people in western Hungary, in a city of 10,000 people in Somogy county

3 local municipalities:

- city with county status of 50,000 people, city with county status of more than 100,000 people, a district of Budapest



Research on homeowners motivations, drivers and obstacles – results





General home renovation

Is in people's mind. They don't really bother about the concept of energy efficiency improvement.

What comes to people's mind about energy efficiency in buildings?

1. HEATING
MODERNISATION
AND WINDOWS
REPLACEMENT

2. INSULATION
(aesthetic factor)

3. „SMART
SOLUTIONS“
(+PV, air conditioner)

Motivations: emotions first!

COMFORT AND AESTHETICS

Immediate, short-term gains are always extremely important, regardless of renovation type.

ENERGY EFFICIENCY = SAVINGS

Immediate drop in utility costs, expected long-term investment, increased property value.

PRESSURE TO RENOVATE

Outdated, dangerous, unreliable, broken-down appliances, moldy walls etc.

FINANCIAL BOOST

Tenders, savings, a legacy available

CONTROL, SAFETY AND HEALTH

More reliable, controllable equipments, no more CO hazard and mold.

BEING „GREEN“

Not a strong driver yet.



Primary obstacles: lack of information and money

GENERAL FEAR OF THE PROCESS

Takes a lot of time, energy, and money. Lots of hassle and impossible management challenges.

LOT OF DOUBTS, UNKNOWN ADVANTAGES

Lack of information about the possible positive results, while doubts about the investment.

DIFFICULT OR NO SUBSIDIES

Lack of information, bureaucratic application, difficult timing and other administrative challenges.

UNPREDICTABILITY AND LACK OF CONTROL

The renovation easily turns to chaos. Hard to schedule the process and keep the budget as planned.

LACK OF EXPERIENCE AND EXPERTISE

Constant long-term decision-making situations with high responsibility causes a lot of stress.

LACK OF TRUST AND LACK OF INSTALLERS

Difficulties to find reliable installers with the right skillset for a fair price.



Evaluation of the RenoHub concept

In general: very **positive** reactions.

- Provides help and solution for many obstacles:
 - Tremendous information in one place
 - Somebody to turn to with questions
 - Trustable contractors
- However, they are sceptical as well:
 - It might be expensive
 - Who are they and why are they helping?
 - If a local community is involved: it might be slow and bureaucratic



Thank you for your attention!

Fanni SÁFIÁN
safian@mehi.hu

FOLLOW OUR PROJECT!

website: renohub-h2020.eu

facebook.com/RenoHUb.projekt

twitter.com/H2020_RenoHUb

linkedin.com/company/renohub-project



This project has received funding from the European Union's Horizon 2020 Secure, clean and efficient energy programme under Grant Agreement No 845652