MAPPING THE DEMAND DRIVERS

REFURB DELIVERABLE REPORT 2.2

Overview and
one-stop shop solutions
for private homeowners

refurb

Deliverable D2.2 Mapping the demand drivers

GA N° 649865

Project acronym:	REFURB
Project's coordinator:	Dieter Cuypers (VITO)
E-mail:	dieter.cuypers@vito.be
Work Package leader	Dominiek Vandewiele (Leiedal)
E-mail:	dominiek.vandewiele@leiedal.be
Dissemination level	public

October 2015

Main contributors and editors:

Dominiek Vandewiele (Intermunicipal company Leiedal, BE)

Tine Steen Larsen (Aalborg University, DK)

Dieter Cuypers (VITO, BE)

Contributors:

Mario Kremling (ISW, DE)

Pernille Jespersen Beck (Project Zero, DK)

Alan Laws (Municipality of Leeuwarden, NL)

Djoera Eerland (FUDURA, NL)

Kalle Virkus (Tartu REA, EE)

Jelena Vidovic (BSC, SI)

Summary

In the REFURB project a market segmentation that is relevant for NZEB-renovation and demand aggregation schemes was developed (report D2.1). These segments are linked with drivers and barriers homeowners face when deciding on NZEB-renovation.

Barriers are the psychological, social, financial and other negative arguments not to carry out a renovation. These originate in motivations, desires, needs and the financial situation of homeowners.

Drivers are the counterpart of the barriers: they are the psychological, social, financial and other positive arguments to carry out a renovation. These also originate in motivations, desires, needs and the financial situation of homeowners.

In regions participating in the REFURB project research is available on the drivers and barriers homeowners face to implement energy efficiency renovations. Also on EU-level studies are available. This report is based on this research, combined with the knowledge and experience of the partners.

In REFURB a thematic clustering of drivers and barriers is proposed (Figure 1), based on the insights of the projects, the country reports and the conclusions of task 2.1 (housing market segmentation):

- **Technical drivers and barriers**, linked with the dwelling characteristics and the challenge to renovate to NZEB.
- **Financial drivers and barriers**, linked with the financial possibilities of the dweller and the cost of the NZEB-renovation.
- **Social and behavioural drivers and barriers**, linked with the decision-making process of the dweller, so including the behaviour, attitude of the dweller, as well as the (social) conditions to take a decision.
- **Context drivers and barriers**. These are rather external factors, not directly linked with the dweller or dwelling characteristics, but deal with the particular situation or context the homeowner has to deal with. E.g. legal and administrative issues, tenant-landlord issues, organisation of the building sector etc.

Using these clusters of drivers and barriers and applying them to the segments that can be defined using the method described in the REFURB-report D2.1 gives a better insight into focus areas for removing barriers and using drivers of the identified segments. Based on this report on drivers and barriers in the different segments (D2.2), better ways to organise the demand side will be examined (report D2.3), local differences in demand side drivers and barriers will be examined (report D2.4), and improved approaches to seduce homeowners to integrate NZEB-ambitions within their renovation will be designed (report D2.5).

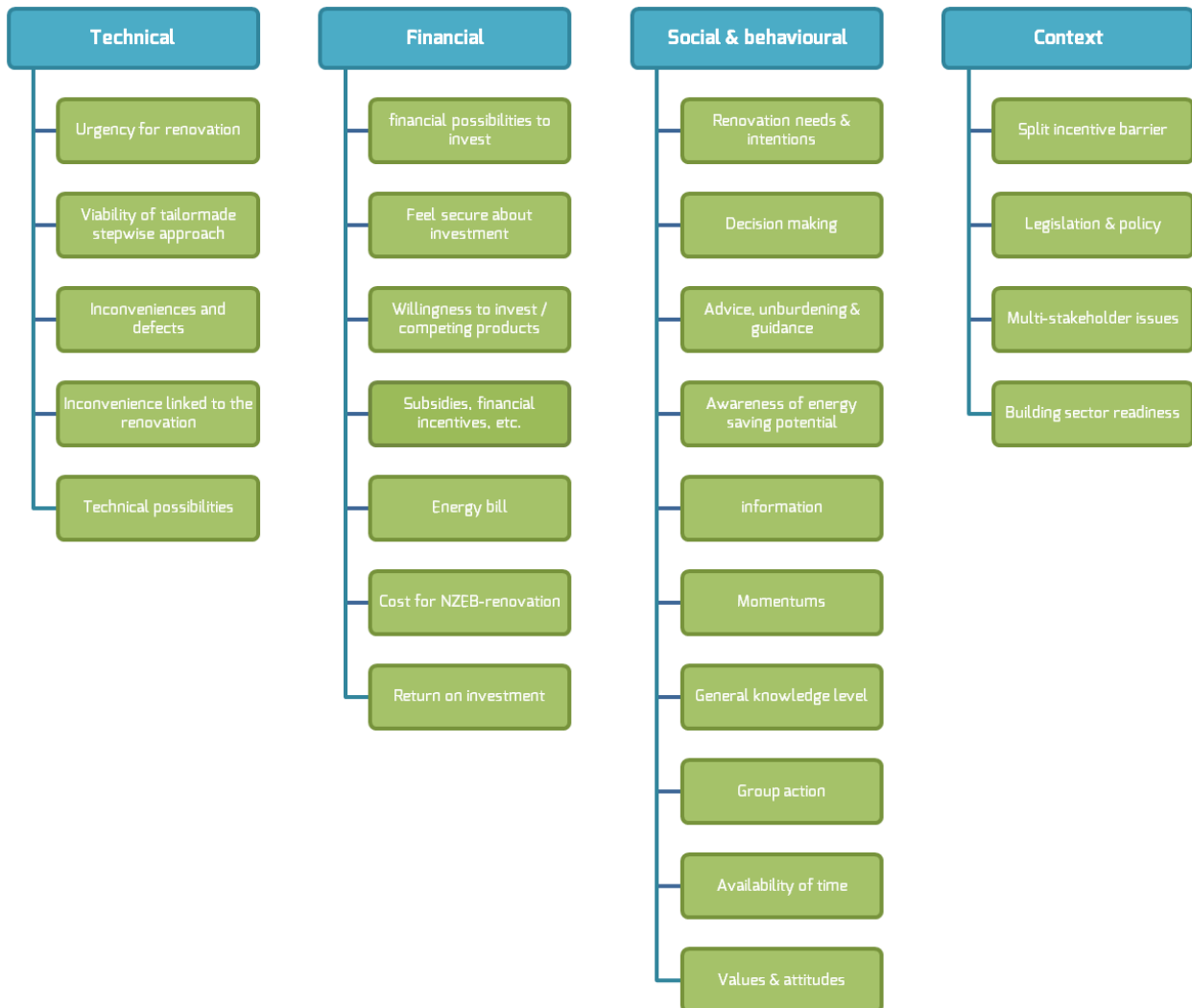| Technical	Financial	Social & behavioural	Context
Urgency for renovation	financial possibilities to invest	Renovation needs & intentions	Split incentive barrier
Viability of tailormade stepwise approach	Feel secure about investment	Decision making	Legislation & policy
Inconveniences and defects	Willingness to invest / competing products	Advice, unburdening & guidance	Multi-stakeholder issues
Inconvenience linked to the renovation	Subsidies, financial incentives, etc.	Awareness of energy saving potential	Building sector readiness
Technical possibilities	Energy bill	information	
	Cost for NZEB-renovation	Momentums	
	Return on investment	General knowledge level	
		Group action	
		Availability of time	
		Values & attitudes	

Figure 1: Clustering of drivers and barriers for NZEB renovations