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Local tailoring and overview of regional differences

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1 Summary

All the country partners in the REFURB project have carried out a tailored analysis of their individual markets and have created a solid overview identifying key local segments, drivers and solutions for each country.

Through tables and visual graphics each country has created overviews of their identified segments, drivers and solutions and have cross-linked their findings in matrix overviews which systematically illustrate the connection between the local needs for supply and the demand.

Two main groups of segments have been identified across the countries:

- Single Family Houses (SFH) with Young Families (YF) and Empty Nesters (EN) as dwellers.
- Multi Family Houses (MFH) with Owners and Tenants as decision maker and dwellers.

Single Family Houses:

Belgium, The Netherlands and Denmark have all identified the Single Family Houses with either a Young Family or an Empty Nester as the most relevant dweller segment for their country.

Germany and Slovenia have also identified the Single Family Houses as a main dwelling segment. However, Germany with focus on the more specific dweller group, under the Empty Nester category, identified as the Open Minded Sceptics and Slovenia with the Young Family as their main focus for a dweller segment in this category.

Multi Family Houses:

Germany have identified the Multi Family Houses owned by a Housing Cooperative as a main segment and **Slovenia** and **Estonia** have identified the Multi Family Houses with privately owned apartments as their high potential segment. The dweller analysis of the Multi Family Houses is divided into an Owner (building Manager) and in the case of the Housing Cooperatives, a Tenant segment, living in the apartment as a dweller. Decisions for renovation in this segment are based on a democratic process guided by regulation specific for each country.

Estonia have identified a sub segment of dwellers who own their apartments, but do not live there, instead renting it out to a third party, typically students. This segment is named "Absentee Owners" and have similar drivers compared to the building Managers.

Drivers:

For each segment the relevant local drivers have been identified and the similarities between countries are illustrated in the tables below, where the drivers highlighted in bold show that the driver has been identified as key by more than three countries.

Table 1 Key similar drivers across the partner counties

Dwelling Segment	Dweller Segment	Drivers
Single Family Houses	Young Family	<ul style="list-style-type: none"> • Urgency for renovation (identified as KEY by three countries or more) • Need financial Solution (identified as KEY by three countries or more) • Adjust functionality to fit modern life style needs (identified as KEY by three countries or more) • No inconveniences (identified as KEY by two countries)
	Empty Nester	<ul style="list-style-type: none"> • Step by step (identified as KEY by two countries) • Solution as part of an investment (identified as KEY by two countries) • Low cost high comfort (identified as KEY by two countries) • Motivated by recognition (identified as KEY by two countries) • Financial possibilities (identified as KEY by two countries) • Expert advice (identified as KEY by two countries)
Multi Family Houses	Housing Coop. Owner/Manager	<ul style="list-style-type: none"> • N/A as only one country has this category
	Housing Coop. Tenant	<ul style="list-style-type: none"> • N/A as only one country has this category
	Private Owner	<ul style="list-style-type: none"> • Lowering cost • Open to new technologies • Comfort Living
	Private Manager and Absentee Owner	<ul style="list-style-type: none"> • Subsidies

The drivers identified for the segments are mostly rational drivers. That is, drivers which speak directly to a given “pain” or “gain” for the dweller or building owner. It is important that these rational drivers are addressed to create a compelling renovation package design.

However, in the design of the compelling offer, it is also important to address the non-rational drivers in the decision process. The designs must be easy, accessible and affordable to attract a majority of the market in each country.

Solutions

For each segment a list of key solutions has been identified addressing the identified drivers of the segment. The solution tendencies across the countries are illustrated in the table below. The solutions highlighted in bold show that the solution has been identified as key by more than two counties:

Table 2 Key similar solutions across the partner counties

Dwelling Segment	Dweller Segment	Non technological solution
Single Family Houses	Young Family	<ul style="list-style-type: none"> • One-stop-shop • Visualization of Renovation • Renovation grants and loans • Best practice/ Cases
	Empty Nester	<ul style="list-style-type: none"> • Step by Step • Holistic financial plan • Investment plan • Local partnerships who can fill in a staged approach • Expert advice (free and independent) • Best practice/ Cases
Multi Family Houses	Housing Coop. Owner/Manager	<ul style="list-style-type: none"> • N/A as only one country has this category
	Housing Coop. Tenant	<ul style="list-style-type: none"> • N/A as only one country has this category
	Private Owner	<ul style="list-style-type: none"> • Subsidies
	Private Manager and Absentee Owner	<ul style="list-style-type: none"> • Subsidies

As can be seen from the analysis there are similarities between the countries which each country can use as inspiration for the further work in designing compelling renovation packages for the identified high potential segments. This report serves as a tool for the development of NZEB solutions across Europe.