



Clear 2.0

enabling Consumer to Learn about, Engage with, and Adopt Renewables

CLEAR Talk2Test



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CONTENT

01

INTRODUCTION

02

ENERGY CONTRACT AND USAGE

03

SUSTAINABLE ENERGY: MEANING, DRIVERS AND BARRIERS

04

SUSTAINABLE ENERGY IN HOME

05

CONCLUSIONS & RECOMMENDATIONS



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1. INTRODUCTION






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RESEARCH OBJECTIVES

This research has been conducted to understand...

-  **01** the triggers and barriers of sustainable energy
-  **02** the motivations and the restrains for changing behavior
-  **03** how consumers' sustainable energy behavior can be changed



The results of this research will steer both TA's **communications to consumers** and **comparative tests**.



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METHODOLOGY

Talk2Test

This research was conducted on the **ongoing community** of Test Aankoop – Talk2Test – on which we addressed our research questions to **N=90 respondents** over the course of **2 days**.

**N=87
respondents**
actively
participated to the
first project on
Talk2Test

**N= 35
Members**

**N= 52
Non-members**

**N= 41
Dutch speaking
respondents**

**N= 46
French speaking
respondents**

- All respondents were between 30 and 70 years old.
- All respondents were owner of their home
- None of the respondents lives in an apartment/studio.
- All respondents are (partly) responsible for the decisions related to energy within their household



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SAMPLE

Background of respondents and their living situation



TYPE OF HOUSE

Respondents of this research have more often **an attached house or a detached house**, instead of a semi-detached house.

Their **habitable surface** is mostly between **100 – 250 m²**.



YEAR OF CONSTRUCTION

Most of the houses of the respondents were **built before 1960 or between 1960 – 1990**. Some have a newly built house, but most bought an older house and renovated it during the years.



LOCATION

Most respondents of this research **live in the periphery** (e.g. a small village, a suburb), such as Gentbrugge or Woluwe St Pierre. It seems like slightly more **French speaking respondents live in rural areas**.



RESIDENTS

Respondents live **most often together with their family** (1 to 5 children). Some respondents live alone, or with their partner as they have no children or their children have left the house.



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SAMPLE

Background of N=87 respondents and their living situation



TYPE OF HOUSE

N = 36 attached house
N = 20 semi-attached house
N = 31 detached house



YEAR OF CONSTRUCTION

N = 34 built before 1960
N = 27 built between 1960 and 1990
N = 26 built after 1990



LOCATION

N = 50 in periphery
N = 12 in rural areas
N = 25 in a city



RESIDENTS

N = 10 live alone
N = 17 live with partner
N = 60 live with family

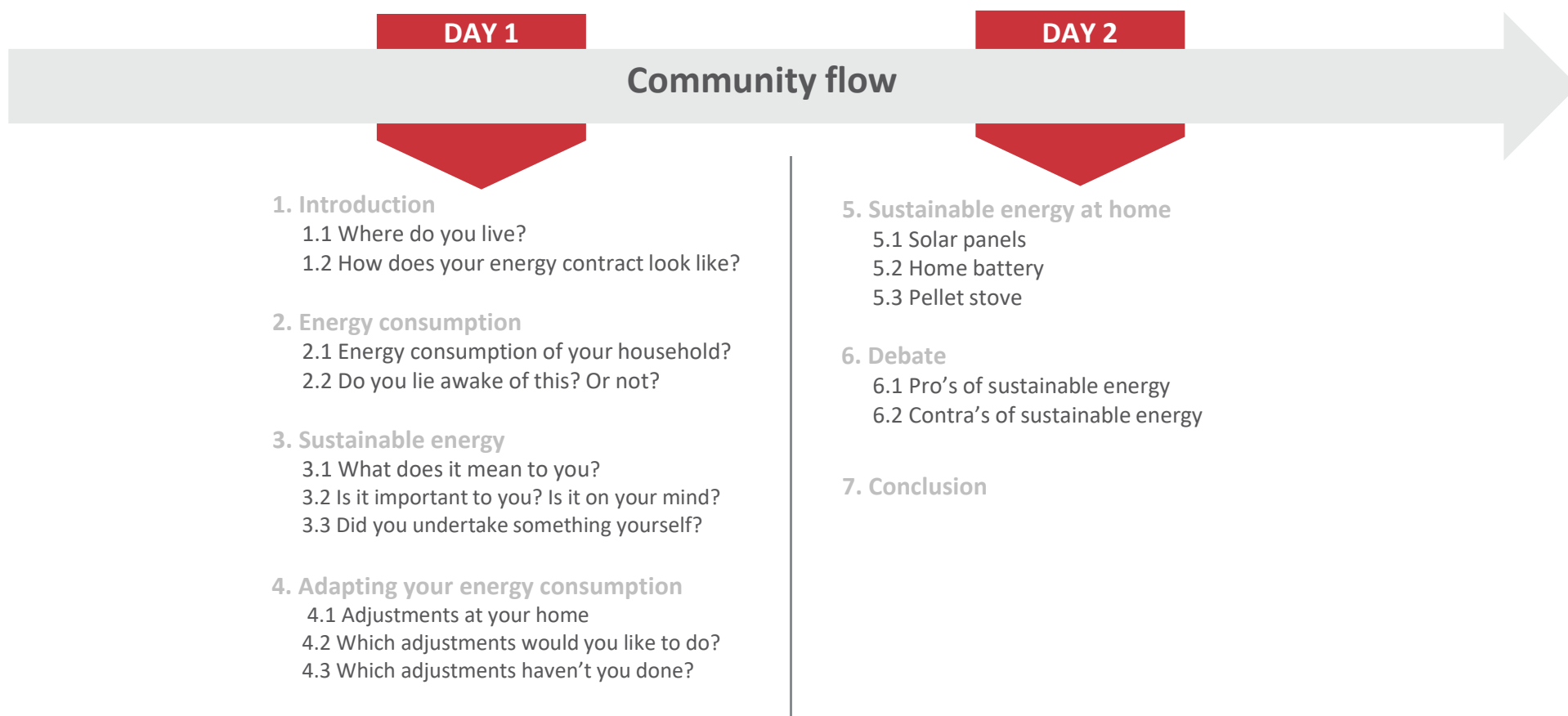


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TOPIC GUIDE





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2. ENERGY CONTRACT AND USAGE



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In general, people are moderately involved when it comes to their energy contract and usage: their supplier and (monthly) cost are well-known. But, their type of contract or their own actual energy usage is less top-of-mind.

However, people attach importance to the cost of their energy usage and their habits regarding to energy. Price is the most important indicator to decide whether to stay or leave a supplier

The more and more people tend to opt for collective energy buying. Not only does it offers the lowest price, collective energy buying also takes the administrative hassle away.



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ENERGY USAGE AND CONTRACT

*Ik ben aangesloten bij Eneco zowel voor elektriciteit als voor de gas. Dit sinds een paar maanden. Voorheen was ik bij Luminus. **Op basis van de VREG heb ik de goedkoopste leverancier gezocht** en dat was Eneco. Bovenop kreeg ik nog een welkomkorting als ik een jaar klant bent, daarom ben ik veranderd. Ik heb **'Eneco vast' voor elektriciteit en een variabel tarief voor de gas**. Ik koos voor vaste elektriciteit omdat het maandelijks kan stijgen en de gas bij eneco is altijd variabel. **Ik heb geen weet van de tarieven.***

Hans, 36 y.o., member

*Je suis client chez Eni depuis mon arrivée dans la maison en 2012. J'ai **un contrat avec prix garanti pendant 3 ans**, renouvelable donc tous les 3 ans. J'ai choisi ce fournisseur car c'était le fournisseur de l'ancien propriétaire et que **les prix offerts étaient les plus importants du marché** à ce moment là. **Je n'ai pas une idée précise des tarifs, non.***

Olivier, 44 y.o., member

*Je suis actuellement client chez Mega, nous avons choisi ce fournisseur car **nous avons fait un achat groupé via Test -Achats** en 2015 **pour avoir le meilleur prix** en fonction de notre consommation. Nous avons un contrat fixe 1 an afin de pouvoir être le plus libre possible.*

Avant nous étions chez Lampiris.

Isabel, 46 y.o., member

*Ik heb **nacht- en dagtarief**. Waardoor ik zoveel mogelijk in het weekend en 's nachts probeer te verbruiken (wasmachine).*

*Als ik mijn energiefacturen vergelijk met andere alleenstaanden, dan verbruik ik echt wel weinig. Zowel voor water als voor electriciteit; Door mijn thermostaat (geïnstalleerd bij de verbouwingen in 2011) verbruik ik minder aan verwarmingskosten. **Ik probeer de temperatuur ook niet té hoog te zetten. Ik trek al eens liever een trui aan.***

Evi, 41 y.o., non-member





ENERGY USAGE AND CONTRACT

People are moderately involved when it comes to their energy usage



Some aspects are better known than others:

- Rather known:
 - Which **energy supplier** they have
 - The **final cost** of their energy usage: mostly the cost per year is known, although some know the monthly cost
- Less known:
 - **Type of contract**: some have no idea about their type of energy contract, others know if it's a fixed/variable contract or a contract for 1 year/several years.
 - **Actual energy usage**: people know their monthly cost but not necessarily their energy usage.



However, people who are **more “ecologically” or “green” minded**, are **more interested in their energy usage**. These people are more aware of their type of contract, actual energy usage or rates.





ENERGY USAGE AND CONTRACT

However, people attach importance to the cost of their energy usage and their habits regarding to energy



EFFORTS

Although people are not that aware of the exact amount of their energy usage or contract, their energy usage is on their mind, especially in terms of costs:

- Energy is seen as something **expensive**, that is a major part of monthly household expenses
- Therefore, people try to **reduce/limit their energy usage** with small adjustments or efforts, e.g. always turning off lights, heating the house somewhat less and putting on a sweater instead, using night rate, turning off devices instead of sleep mode,...
- People **don't know exactly what consumes the most energy**, but they think it's mostly the **heating, wash machine and dish washer, TV and computer**. These are used on a daily base, or even all day long.



DIFFICULTIES

People experience some difficulties and frustrations in trying to minimize their energy usage:

- **Not everybody** in their family is **conscious about the energy usage** or does efforts to reduce it, e.g. their partner doesn't care that much or their children don't pay attention to it.
- Most people attach importance to (the cost of) their energy usage and are willing to **make sacrifices, but not in spite of everything**, e.g. doing the dishes themselves instead of using the dish washer
- Some people have the idea they consume less energy due to their efforts, but the **cost of their energy remains the same or even increases** due to higher energy rates. This discourages them.



ENERGY USAGE AND CONTRACT

Price is the most important indicator for energy usage as well as to decide whether to stay or leave a supplier



When people **follow up their energy usage**, it's mainly on the basis of **the annual invoice**:

- The annual invoice is **compared with previous invoices or with the amount of friends** in a similar situation (e.g. single, with children, row house,...)
- The annual invoice is mainly used **to detect price fluctuations** (increases or decrease of total amount, in comparison with previous)



A remarkable **increase of annual cost** is the **main trigger** to start looking for another supplier and change



Most people change from time to time of energy supplier:

- **Comparison is often made with websites** such as **VREG** (Flanders) or **CWAPE** (Walloon). These websites are seen as objective, complete and clear
- Choice is mainly made based on the **lowest price. Service** (such as communication, customers service) may also help to choose.

Some people rarely/never change energy supplier: they're satisfied with the service, the price difference is too small to change (<€50/year) or they have lack of interest.



ENERGY USAGE AND CONTRACT

Collective energy buying appeals as it brings peace of mind

People make a group purchase via municipalities, provinces or consumer organizations like Test-Achats.

Collective energy buying is a **popular way of concluding a contract** with an energy supplier. It brings **peace of mind** as people don't have to worry on 2 levels:



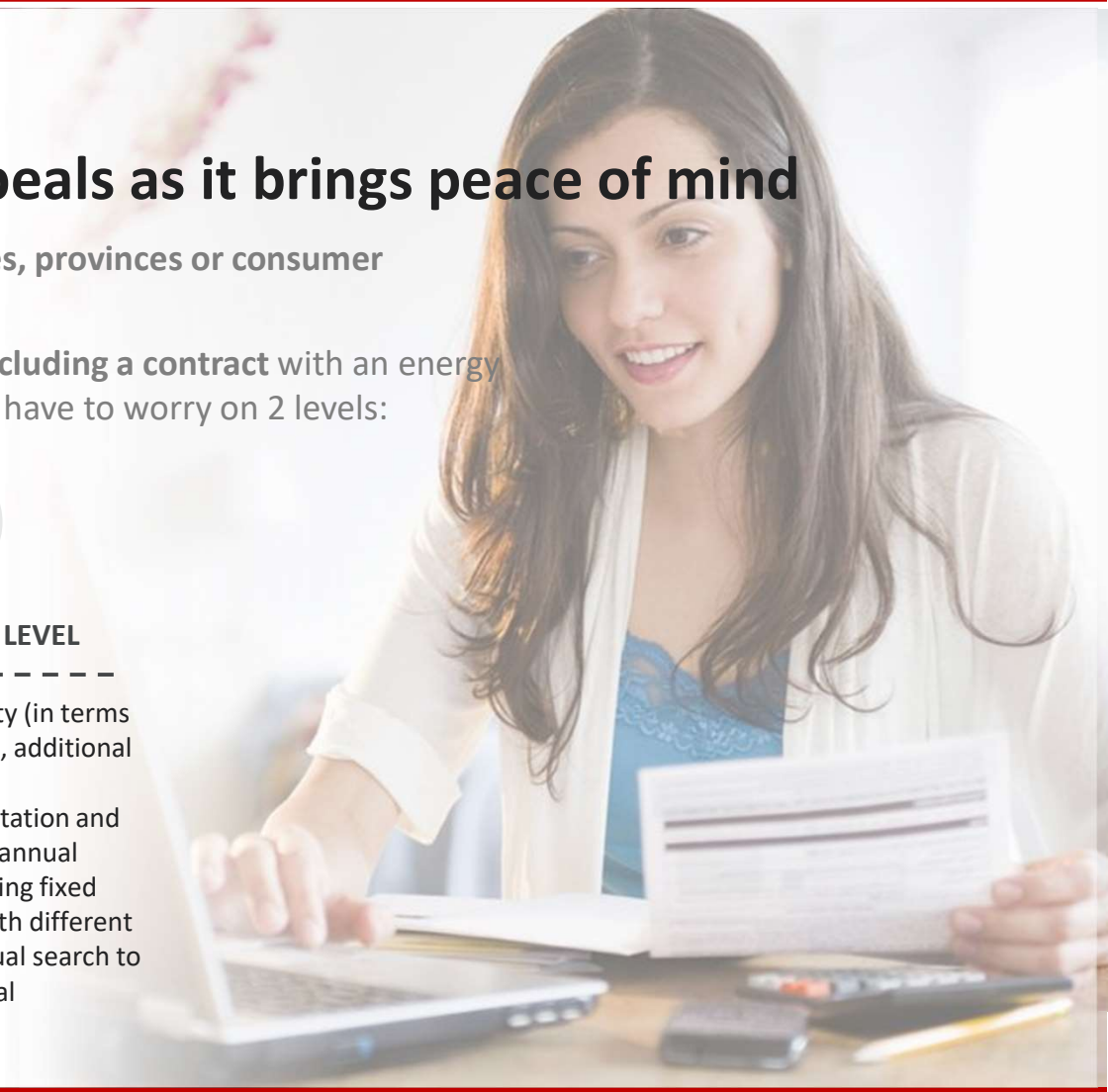
FINANCIAL LEVEL

- Certainty of having the best price available on the market
- ➔ This is the most important reason to choose for collective energy buying



ADMINISTRATIVE LEVEL

- Increased flexibility (in terms of payment terms, additional services,...)
- Ease of implementation and management (no annual hassle of negotiating fixed price contracts with different suppliers, no annual search to the most beneficial supplier,...)





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3. SUSTAINABLE ENERGY



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Sustainable energy is interpreted as “green energy” that doesn’t harm the environment nor does it affect future generations. It is important to people as they are worried about the environment. They perceive it as their duty to contribute to a more green, livable environment.

The primary motivation for sustainable energy is a lower energy cost, the secondary motivation is the environmental friendliness.

People undertake small adjustments as well as greater initiatives in the context of sustainable energy, but experience some barriers.



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SUSTAINABLE ENERGY

Pour moi l'énergie durable c'est un type d'énergie qui me permettrait d'être quasi autonome sans compromettre la vie des générations futures c'est ça la grande différence... Il y a eu le bois, le charbon, le gaz, le mazout. Tout s'épuise et pollue, il faut passer à une énergie plus verte et plus durable mais pour le moment, c'est encore trop cher.

Christine, 58 y.o., member

Ik denk bij duurzame energie aan zelfopgewekte energie, of andere vormen die onze bronnen niet uitputten. Op lange termijn is duurzame energie sowieso de enige mogelijkheid als vb aardolie op is. Het is momenteel wel nog duurder om voor 'groene' energie te kiezen.

Lindsay, 34 y.o., non-member

Aangezien het een nieuwgebouwd huis is, zijn de meeste ingrepen gebeurd tijdens de bouwwerken. We hebben een, naar de normen van 2010, heel goed energiepeil behaald en daar dan ook extra vergoedingen voor gekregen. Zo hebben wij vrijwillig een paar centimeter dikkere isolatie in de muren gestopt. Ook onze ramen zijn beter geïsoleerd dan moest zijn. Onze vloerverwarming en extra dikke isolatie daaronder dragen bij. Ik vermoed dat onze grootste verandering is: geen droogkast meer. Dat schijnt het meest energieverslindende toestel te zijn. Dat gebruiken we niet meer. De was droogt buiten of op een rek in de berging.

Renzo, 43 y.o., non-member

Pour diminuer ma consommation, j'essaie de suivre les conseils recommandés (entendus de spécialistes), par exemple changer d'ampoules, ne pas laisser des appareils en veilleurs, acheter des appareils électriques consommant moins, achats de frigo nouvelle génération.

Evidemment je suis consciente que je pourrais encore diminuer ma consommation, mais cela demande des moyens financiers pour remplacer tous les appareils électriques par des nouveaux consommant moins aujourd'hui.

Rosine, 48 y.o., non-member





SUSTAINABLE ENERGY

Sustainable energy is considered inherently different from 'normal' energy, but is positively evaluated



'NORMAL' ENERGY

- **Image:** seen as basic, 'traditional' energy, that doesn't take the environment into account
- **Production:** produced by nuclear power plants, with exhaustible sources
- **Impact:** does harm the environment and affects future generations
- **Price:** perceived as rather cheap in comparison to sustainable energy



SUSTAINABLE ENERGY

- **Image:** perceived as 'green energy' or 'alternative energy', that is environmental friendly
- **Production:** produced by solar panels or wind mills, with inexhaustible sources
- **Impact:** doesn't affect future generations or harm the environment
- **Price:** often perceived as more expensive than 'normal' energy



SUSTAINABLE ENERGY

The main motivation to implement sustainable energy is price

Sustainable energy is **important to most people**: they are well **aware of its existence and importance**. People are **worried about nature and the environment**. More involved people consider it as **their duty** to contribute to a more green environment where it's nice living for people and animals.

Pros of sustainable energy:



- **Economical-related**, as sustainable energy is linked to:
 - Lower energy consumption of 'normal' energy
 - A good investment on term
 - Independence of energy prices on the market
- **Environmental-related**: increasing environmental awareness, stopping global warming and contributing to more fresh air.

→ Initiatives of sustainable energy are perceived as investments for both the individual and the environment

Cons of sustainable energy:

- Big investment, so people should have this amount and should be able to pay it
- The time consumed to delve into it
- The time consumed to maintain the devices after installation
- The sacrificing of space (especially in case of pellet stove, windmill)
- The need to perform home renovations





SUSTAINABLE ENERGY

People undertake different types of initiatives in the context of sustainable energy

Small adjustments to minimalize their current energy consumption and improve their current situation

E.g. placing building insulation, buying led lamps, replacing broken devices by devices with energy label A

→ Low effort and hassle, without needing to renovate the house or replace devices before they are broken

Greater initiatives to produce sustainable energy and to provide their own energy:

E.g. solar panels, pellet stove, solar water heater

→ Often quite some effort: demands more considerations, knowledge and adaptations of the house and is often quite expensive.



Although most people already do efforts in the context of sustainable energy, most think they can do better and improve their situation at home. However, there are some barriers (discussed in next chapter)



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4. SUSTAINABLE ENERGY AT HOME



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For both people who implemented initiatives of sustainable energy and those who have not, is money the main reason.

People who have implemented one of the initiatives of sustainable energy are happy with the result as it meets their expectations on economical and ecological level.

Solar panels are the most obvious initiative of sustainable energy thanks to its popularity and subsidies.

In contrast, awareness and knowledge of home batteries are rather low.

Pellet stoves are known by some and evoke varied reactions.



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SUSTAINABLE ENERGY AT HOME

Zonnepanelen werden aangekocht via groepsaankoop via werkgever, niet enkel milieubewustzijn, maar ook fiscale aftrek van de investering en de groene-stroomcertificaten vormden een mooie bonus. Tot op heden enkel voordeel bij aankoop en mooi rendement. Geen enkel probleem ervaren.

Dirk, 54 y.o., non-member

J'aimerais placer des panneaux solaires. Ce qui me fait hésiter c'est la solidité de mon toit et l'ampleur des travaux à effectuer. Un facteur décisif serait d'avoir une espèce de devis global prenant tout en charge, installation raccordement et calcul du gain assuré (pour avoir un amortissement effectif de l'installation) tout cela garanti par mon fournisseur d'énergie.

Alain, 48 y.o., non-member

Toen we dit huis kochten, kregen we de energiefactuur van de vorige eigenaar te zien en dat was slikken! Het dak en de ramen waren aan vervanging toe, dus deze ingreep voerden we uit volgens de huidige energiebesparende normen. De twee oude boilers werden vervangen door warmtepompboilers, de vele spotjes en lampen door LED vervangen en de buitenverlichting op zonne-energie, alle kleintjes helpen nietwaar! Wat is moeilijk en wat een uitdaging? Helaas speelt hier vaak 1. onwetendheid en 2. enorm kostenplaatje! Er zijn zoveel aanbieders, elk met zijn waarheid en het grote kostenplaatje maakt de onzekerheid des te groter. Maar, wij zijn zeer tevreden van alle aanpassingen die gebeurd zijn! Duidelijk verschil in vergelijking met de energiefactuur van de vorige bewoners! Alleen jammer dat hiermee onze rekening volledig geplunderd is!

Sigrid, 31 y.o., non-member



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SUSTAINABLE ENERGY AT HOME

For both people who implemented initiatives of sustainable energy and those who have not, is money the main reason.

People who implemented initiatives of sustainable energy:

- The reasons for implementation were mostly:
 - The start of their **newly built house**
 - The start of **renovations of their current (old) house**
 - The **purchase of an outdated house**, with a bad *EPC-value* (energy performance certificate)
- Motivations to implement these initiatives are:
 - **Financial benefits**, such as tax deductions, *groene stroomcertificaten*, lower energy cost
 - **Legal regulations**, such as *EPB* (energy performance regulations)
 - **Ecological benefits**
- The **challenges they experienced were limited**: during the search and decision process, price and lack of knowledge were perceived as challenges. During installation, only the hassle in-home was a challenge.
- People who have implemented one of the initiatives of sustainable energy are happy with the result as it **meets their expectations on economical and ecological level**. They **don't regret their decision**.

People who didn't implement any initiative of sustainable energy (yet):

- Most of them **encourage these initiatives** and plan to implement them in the future, *e.g. solar panels or a solar water heater*.
- Reasons why they have not implemented these initiatives (yet) is mostly because of **lack of budget** (due to other renovations or limited income). **Limitations of their house** is a second reason (see solar panels and pellet stoves).
- If money wasn't an issue, people are **open to almost every initiative of sustainable energy, except for a windmill** in their garden ;-).





SOLAR PANELS

“

Ik heb 10 zonnepanelen geïnstalleerd. Het belangrijkste was om het E-peil van mijn woning te halen bij de nieuwbouw.. De voordelen zijn winst en bijdragen aan de natuur. Nadelen zijn de taksen die de laatste jaren erop geheven worden.”
Maxim, 27 y.o., member



SUSTAINABLE ENERGY AT HOME

Solar panels are the most known initiative of sustainable energy thanks to its popularity and subsidies



Solar panels are well-known and many people would choose this to obtain sustainable energy. Owners recommend solar panels to others as it pays off for them.

The 16 owners in the community generally haven't experienced administrative hassles or problems with energy suppliers, which is in line with the expectations of non-owners.

Non-owners have doubts about the efficiency and investment of solar panels.



- Subsidized by the government, especially in the past
- Energy bill lowers
- Safe feeling of being able to provide own energy



- Need the budget to invest
- Not aesthetical: according to some, solar panels on a roof is an ugly view
- Not possible for every house: limitations due to position and orientation of roof or due to limited surface of the roof
- Uncertainty about the profit
- Recent political changes of subsidies



People hope to be motivated in the future with: more subsidizations, a compacter product to improve the view and a personalized calculation of the profit would motivate people to buy solar panels. Besides, a collective buying of solar panels would also appeal because of the lower purchase price.





HOME BATTERY

“
Je n'en avais jamais
entendu parler. Je ne sais
absolument pas ce que
c'est. C'est donc difficile
pour moi de dire si je
l'achèterais ou pas. Les
questions: est-ce que c'est
efficace, rentable,
esthétique, écologique?”
Olivier, 44 y.o., member



SUSTAINABLE ENERGY AT HOME

Awareness and knowledge of home batteries are rather low



Home batteries are much less popular: most people don't know its existence or the way it works. It raises many questions.

No one of the respondents owns a home battery. People suppose it's still in its infancy and therefore expect it to have a high purchase price. However, the feeling of independence appeals.

Some people who plan to buy solar panels in the future, would inform themselves about home batteries.

As people don't really know this product, they can't hardly name advantages or disadvantages:



- **Independency**, e.g. when there's a power failure or not enough sun



People question many aspects (partly due to their lack of knowledge):

- **Amount of efficiency**
- **Amount of investment**
- **Wapacity**
- **Price**
- **Level of durability**



More awareness and knowledge (explanation) is needed to understand this product and eventually buy it.





PELLET STOVE

“

Ja heb er er van gehoord, maar heb het nooit overwogen omdat we reeds een houtkachel hadden en ik de investering niet wou maken. Zou dan eerder mijn geld steken in zonnepanelen. Ik ken het ook niet genoeg.”

Pieter, 35 y.o., non-member



SUSTAINABLE ENERGY AT HOME

Pellet stoves are known by some and evoke varied reactions



People have different opinions about pellet stoves: they don't seem to have a clear image of 'environmental friendly', as its look and feel is close to a traditional stove.

Only 6 respondents of the community had a pellet stove at home. Often, they compare or confuse it with a cassette stove. A pellet stove **seems not to convince**: some (ecologically-minded) people question its environmental friendliness, other prefer the warmth of central heating or fire places.



- Cozy, comforting warmth
- Homey look
- Pellets are **handier and more compact than logs** (for a fire place)
- A type of sustainable energy (according to some)



- Environmental friendliness is questioned: production and burning of the pellets
- Usability is lower than with central heating: maintaining and cleaning the stove, buying the pellets,..
- Only heats one room and the warmth isn't that enjoyable
- For some, pellet stoves **don't have a modern look**
- Fire hazard, so not safe (especially not when having children or pets)
- Takes place
- Rather big investment



People need more knowledge about pellet stoves and more clarity about its ecological consequences.





SUSTAINABLE ENERGY AT HOME




In conclusions, people are open for sustainable solution if the are aware of it and when buys off financially

BARRIERS TO IMPLEMENT SUSTAINABLE ENERGY

- **Purchase price**
- **Limited knowledge**
- **Needing to change/renovate the house**
- **Uncertainty** about regulations and subsidies



WAYS TO OVERCOME BARRIERS

-  Providing **information and knowledge** about each of these initiatives
-  **Financial help, subsidization and collective buying** (of solar panels) will encourage people.
-  **Personalized proposals**, tailored for people's house, habits and lifestyle, to gain insights in the profits.





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5. TO SUMMARIZE...



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QUESTIONS?

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At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” - our tagline - summarises our ambition.



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