



Clear 2.0

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

CLEAR Czech Republic

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The project leading to this application has received funding from the European Union's Horizon 2020 research and Innovation Program under grant agreement No 749402





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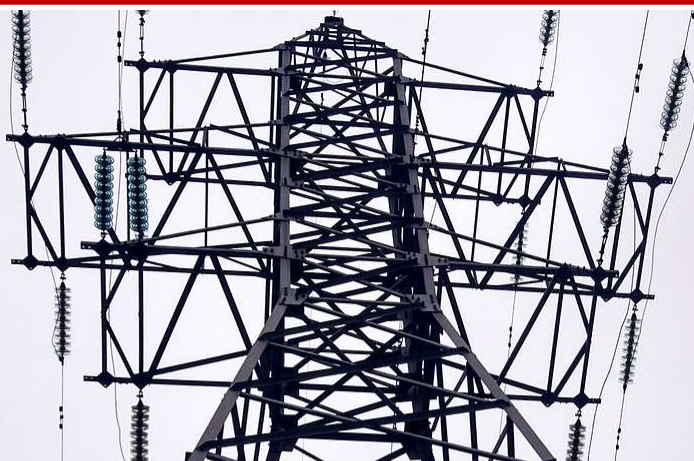
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1. INTRODUCTION



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RESEARCH OBJECTIVES

This research has been conducted to understand:

How people in the Czech Republic think about sustainable energy

Motivations and barriers for changing their behaviour

How consumers' sustainable energy behaviour can be changed

With the results of the research we are able to tell how people in the Czech Republic think about sustainable energy and what is important to communicate for changing their attitude.



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METHODOLOGY



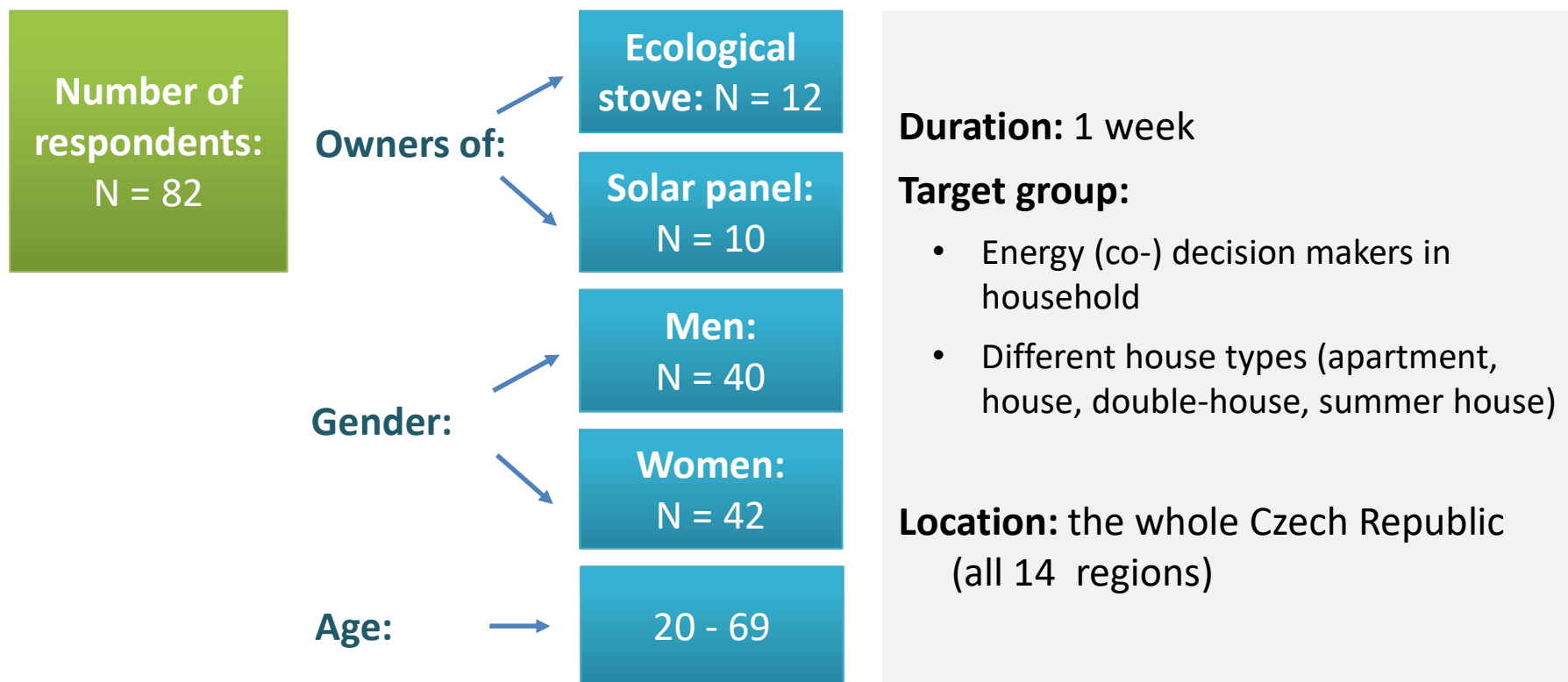
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iVox Online Forum

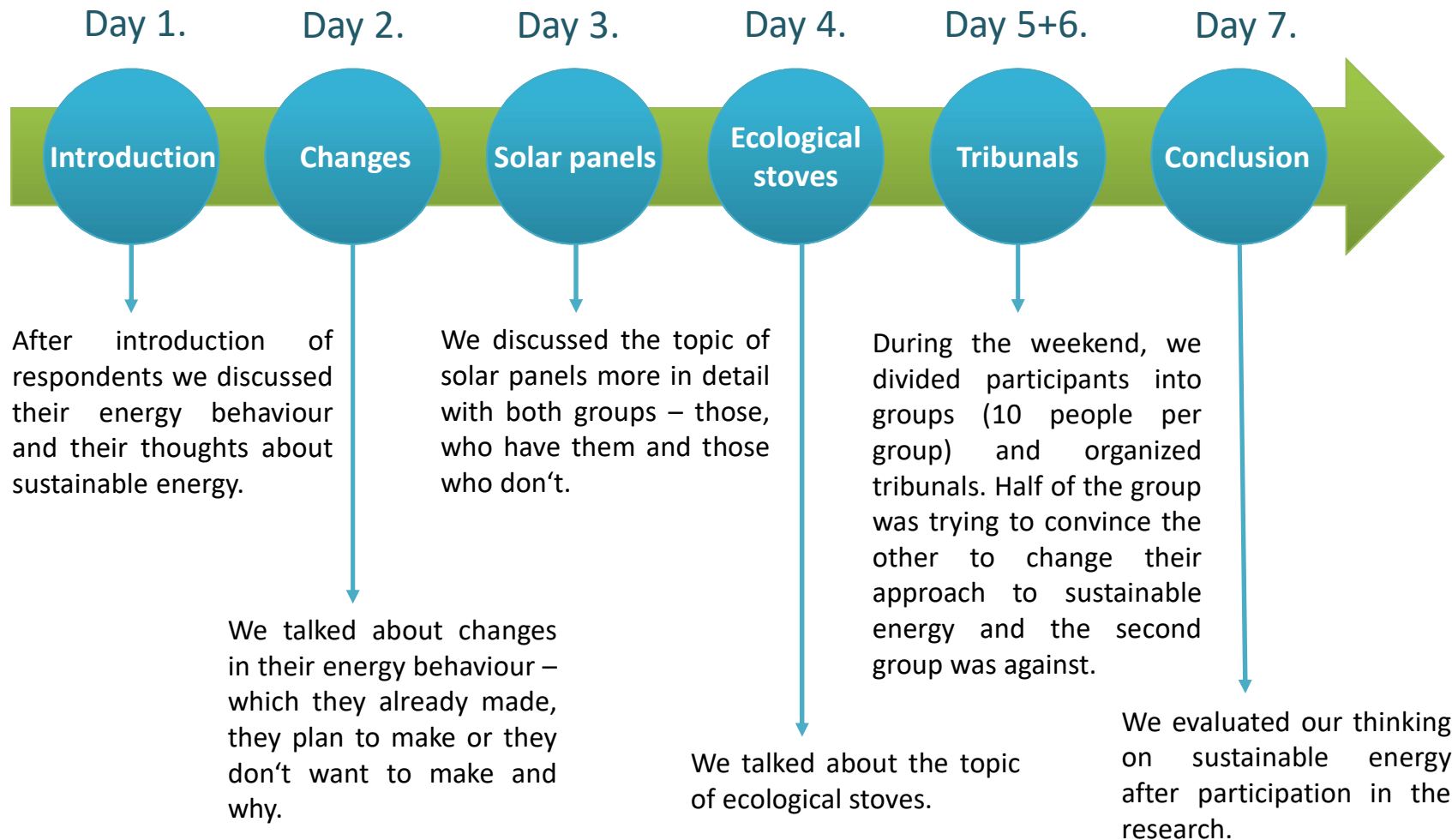
82 respondents were participating in our online forum, discussing different topics with our moderator every day for one week.





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2. SUMMARY



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When it comes to energy behaviour in the Czech Republic, almost all respondents care about their uses. Rather than how much electricity they actually use, they're tracking how much they spend for it per month.

The most significant element influencing their behaviour and attitude to energy is price. Price is decisive when it comes to energy supplier – it decides from whom our respondents get electricity and whether the supplier will be changed or not.



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Sustainable energy is most often associated with renewable energy sources. All respondents are convinced that this is the right way, important for the future of the environment and future generations.

The primary driver for changing behaviour in line with sustainable energy is saving money, the secondary driver is the environmental responsibility.

Most of the people are trying to actively change their attitude with the prospect of financial savings, however the finance is also the main barrier in this acting.



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For those who don't have any solar panels or ecological stove, it would be usually mostly difficult to buy those (stoves little bit less difficult than panels).

Those respondents, who already have them, are very satisfied – it fulfilled their expectations, they are saving money and nature.

People usually think they cannot afford panels or stoves. Even though most of them know about subsidies, they still think they are unreachable for them.



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SOLAR PANELS



Motivators:

- Self-efficacy
- Financial saving
- Ecological thinking
- Special offer
- Recommendation
- Re/building of house

Barriers:

- Possible only for family houses
- Too expensive
- Not aesthetic
- Difficult administration
- Difficult to communicate with other residents
- Too long financial returns

ECOLOGICAL STOVES



Motivators:

- Savings
- Legislation
- Subsidy
- Need for a new one
- Easy operation

Barriers:

- Impossible for every type of housing
- Too expensive
- Conservatism
- Difficult administration connected to the subsidies



Detailed information in chapters 5 and 6



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3. ENERGY CONTRACT AND USAGE



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The research shows some typical attitudes in usage of energy in Czechia.



Most respondents are **more likely to follow finance** than the amount of energy they consume.



Maybe if it was online connected to the server, available in the app, I could follow it more often, so I always follow it at the time of the annual paperwork on the paper sent by the distributor. :-)



They usually have energy from the **big energy suppliers** - sometimes they change the supplier according to the prices.



From time to time I change the gas supplier for the one that is the cheapest ... this I do about every three years.



It is quite common that the **backups are set higher:**

- for the certainty that they will not have arrears
- feeling good when their overpayments return.



I have my backups set up so that I have overpayments, which I then use for repairs of the house ...





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Energy behaviour in the Czech Republic is very closely connected with saving strategies.

Most people **know how much they pay for electricity**, but they usually don't follow how much energy they actually use.

Respondents are usually **trying to save intuitively** (having LED bulbs, switching off the lights and heating at a time when they are not in the room / at night, using the washing machine at a time when energy is cheaper, replacing electrical appliances with energy saving ...). This saving is also connected to finance.

When it comes to energy suppliers, most people take into account the **price**. They don't have any problem to change the supplier if they offer a better and cheaper tariff than their existing supplier.



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Finance

Money is the biggest topic when it comes to energy and can be both – driver and barrier in energy behaviour.



Finance play the main role in decisions making and thinking about energy:

→ Even though people know how important energy behaviour is for ecology, on a personal level they are mostly trying to save their money.



When it comes to sustainable energy, finance is always a topic:

→ According to the results of the research, there is the notion that ecological energy sources are good but expensive. It's actually kind of luxury that not everybody can afford (despite possible subsidies).



Thinking about solar panels or ecological stoves, people always think about money, too:

→ Most of the people are interested in these sources of energy, they are aware of their benefits, but basically they just cannot afford them – and finance is very often the first association with these.



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4. SUSTAINABLE ENERGY



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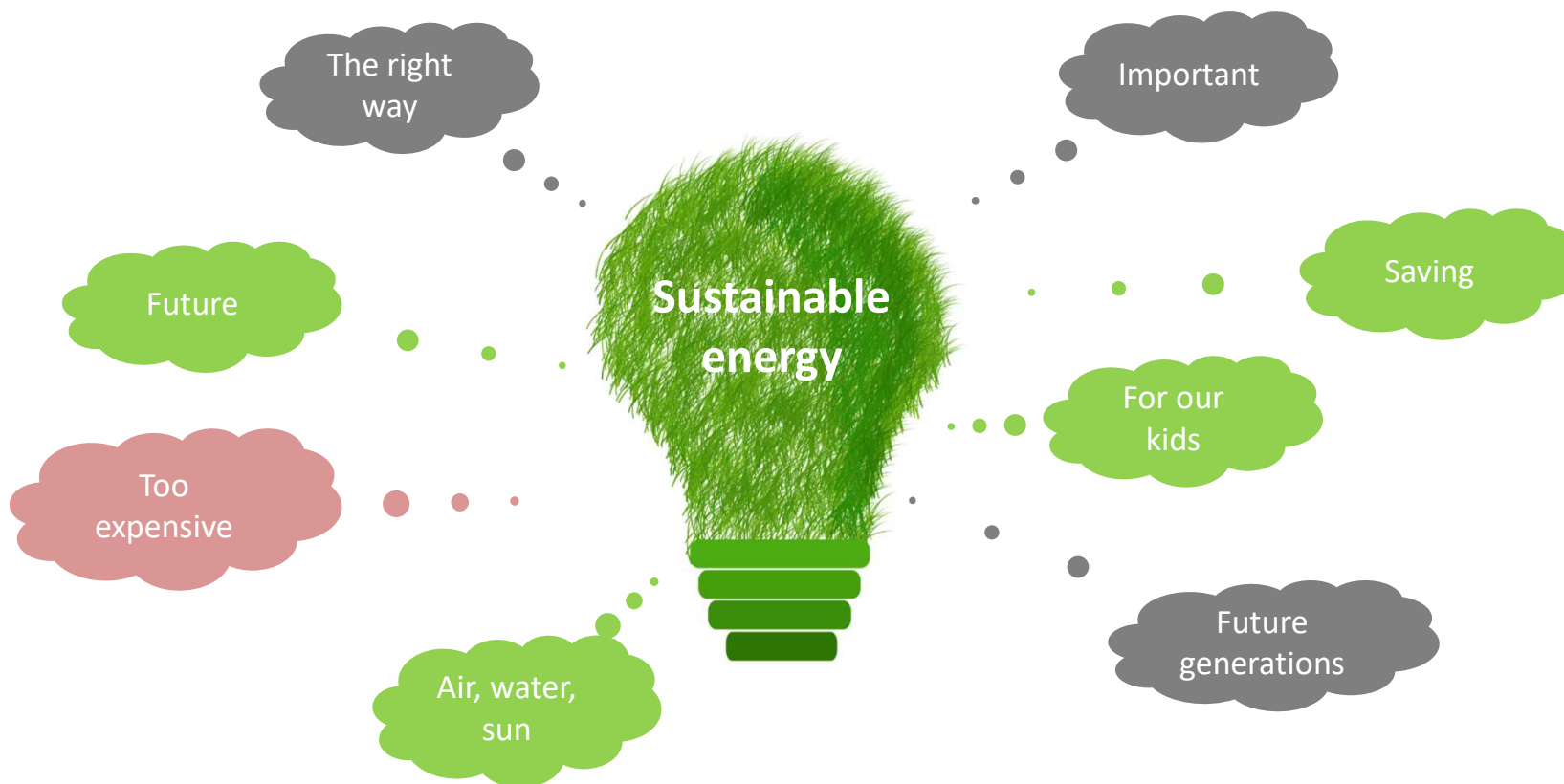




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What does sustainable energy mean to our participants?

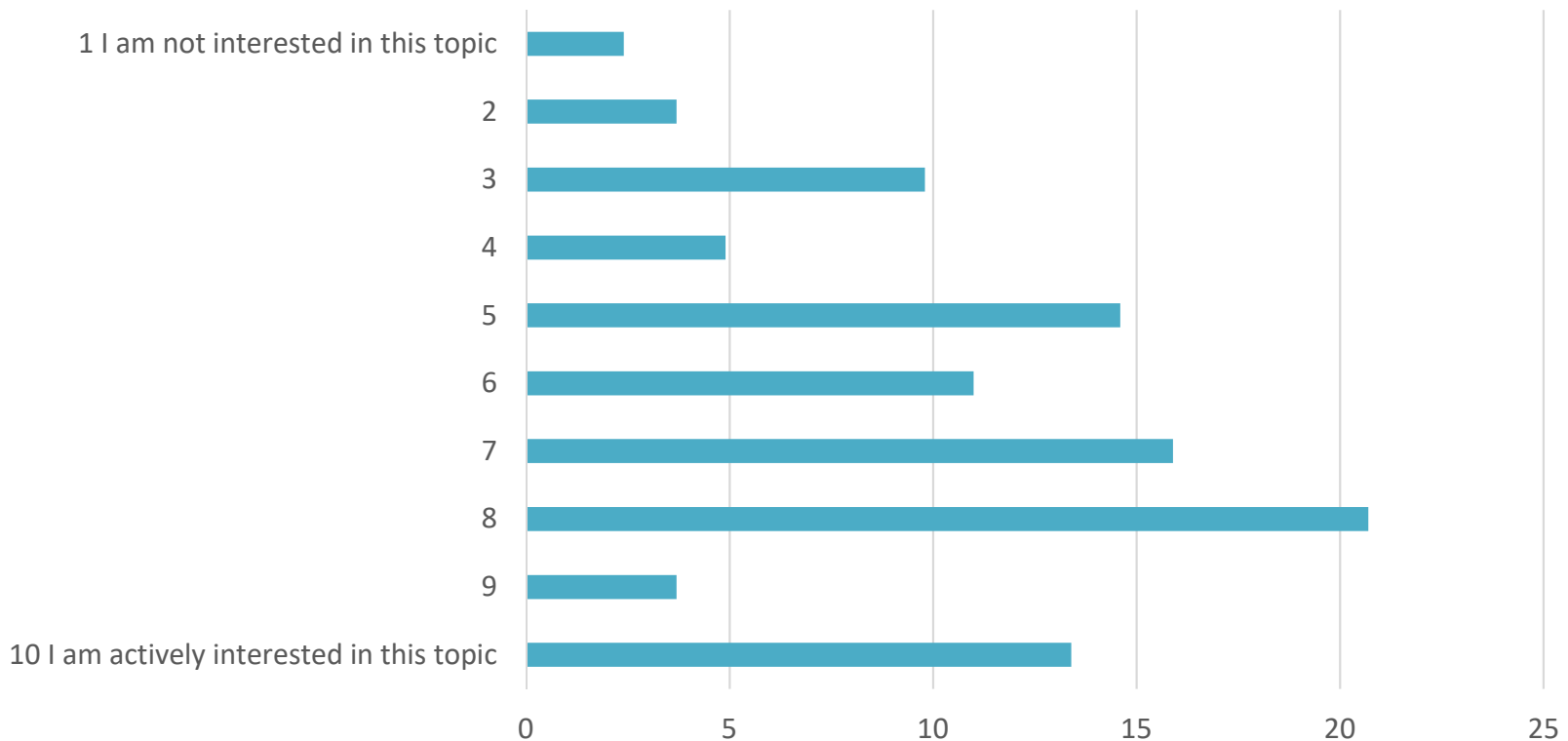




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In the beginning of our research, participants were asked to vote in poll about how interested they are in the topic of sustainable energy. **The chart shows that more than 35 % are not very interested in the topic (answered 1 to 5).**



* %
N = 82



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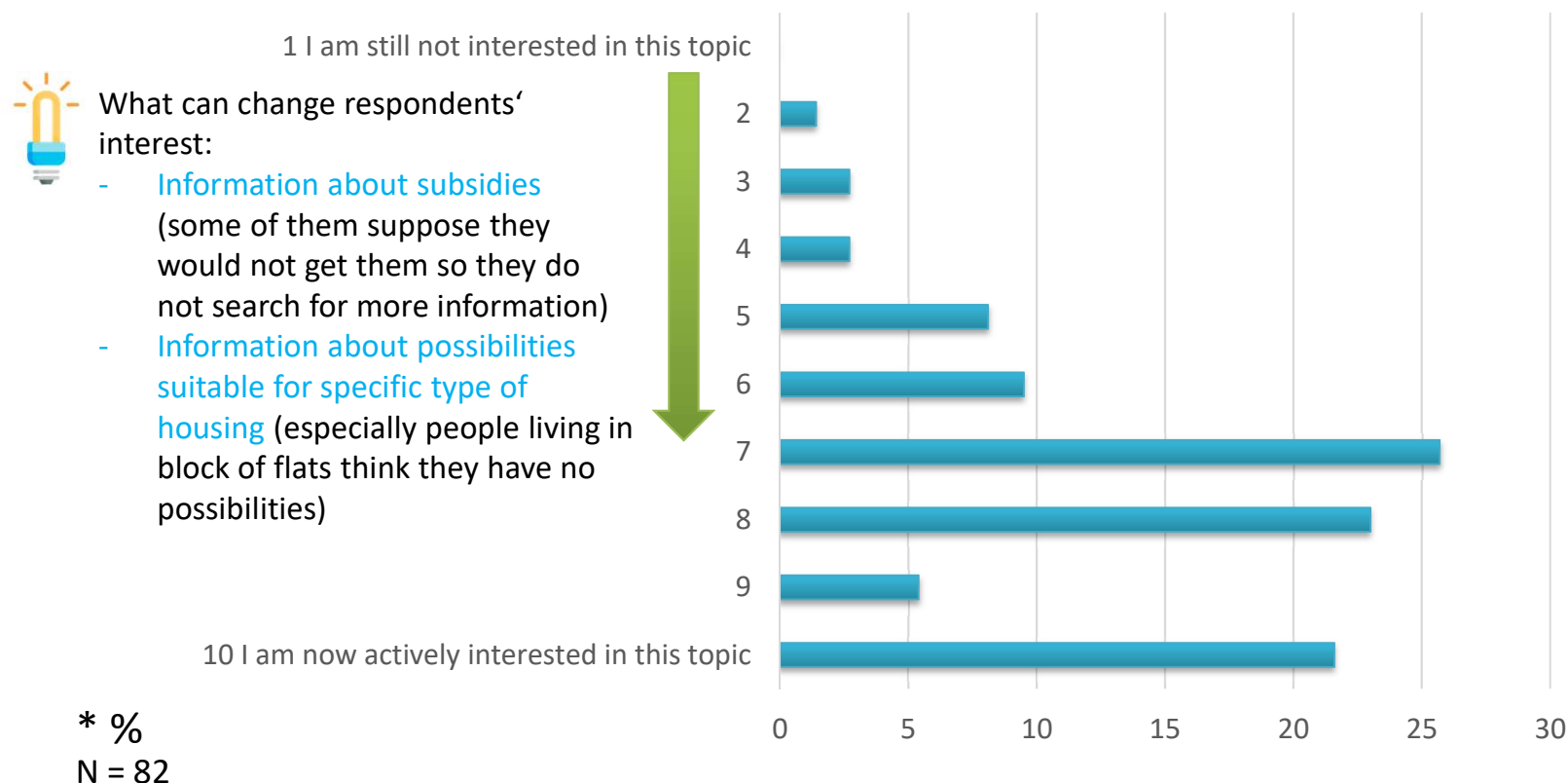




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In the end of our research, participants were asked again to vote in poll about how interested they are in the topic of sustainable energy. In the first poll, more than 35 % of the respondents answered between 1 and 5. **In the final poll, this number declined to 14,9 %.**





Willingness to change

In general, people are open to changes in their energy behaviour, if it won't cost them too much money and too much effort.

The most common reasons why people cannot or do not want change their behaviour :

- Lack of finance (too expensive technology)
- Return on funds deposited is too long
- Type of housing (mostly in cases of panel houses – since they don't own the all house, they cannot decide themselves)
- Lack of suitable examples (large stores, factories or carriers do not behave ecologically)
- Instability of the legal and economic environment (uncertainty about the conditions + they are still expecting some better innovations and offers to come)
- They don't feel supported from the state enough (they would expect the state to be more helpful in the case of subsidies)

When changing their behaviour, the most common drivers for people usually are:

- Economic saving
- Environmental responsibility



I think as an individual I'm just a grain of sand in the desert. It's a terrible thing for me to see all the shops all night long, the smog of light does not tell them anything, everywhere, it is really wasteful in the big and absolutely useless. I think changes should start with giant businesses, hypermarkets, and so on.





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Pro-changes arguments:



*If you do not want experience the time when brown and black coal is a precious mineral, put in your life the space for alternative energies of the **sun, water, air ... it is not just a trio, which means summer comfort**. These three sources of energy can bring us energetic hope.*



*We must all behave responsibly and ecologically, and not only to think of ourselves, but also of others and of the environment as a whole. Say, I'm going to melt out the oil because I do not save it, it's nonsense, because it can be said by everyone. **Epecially nowadays, when it is possible to use the subsidy for ecological heating, there is nothing to think about**. Nowhere will you get anything for free, and if it was not worth it, then it would not be a subsidy.*



Everybody should start with himself. If everybody was waiting for the others, we would never be able to move forward.



*To behave responsibly to the environment is modern and cool today, and I think it also **benefits me**. Not only a good feeling but also a savings in the family budget.*





Con-changes arguments:

“ Hello, as an opponent, I have to say *that it will definitely be expensive*. Today, everything healthy, environmentally friendly and environmentally beneficial is *overpriced*, because it also wants to make *companies profit*. Certainly *a lot of running, permitting and who knows if it's worth it at all*. *Man to stand everywhere queues*, begged, and who knows whether we finally get a grant so he could buy something organic or better. This is my opponent's opinion.

“ Has anybody already figured out *what kind of pollution is produced by one traffic plane*? It destroys tons of oxygen, throws tons of oxides and other wastes into the air. And there are thousands in the air at once! *And the individual is supposed to save it?*

“ *Photovoltaics are expensive and do not pay off much*, sunshine is sometimes low, especially during winter.

“ *So why the state isn't doing it in the first place? Why there are no photovoltaic cells and collectors on public buildings. Probably because it's too expensive.*

“ *People for money dispose of everything no matter what, so why should I get eco-friendly when a nearby factory releases into air more poisons than all of our city?*

“ *The worst was to get a stove subsidy. When we bought it, there was no possibility over the internet and I stood the queue for over 7 hours. I don't know why it wasn't possible to send a written request through the website. When donating - to all who meet the conditions and not to the first ones in the queue!!!*





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All the changes – from the past and changes they would/not like to do - are usually connected with financial saving.



Easy to change

People are easily willing to change:

- Light bulbs (for the energy saving ones)
- Energy saving appliances (after the old ones break – they don't want to throw them away if they still work)
- Insulation of the house (if not old), changing of windows

Main motivation is always to save money



Changes they would like to do but it is too complicated

People very often mentioned **solar panels**.

They usually haven't buy them yet because of:

- Too high initial investment
- Instability of the legal environment
- Difficult administration

They like the idea of self-sufficiency. Motivation could be financial incentive from the state



Changes they don't want to do

Respondents are generally not against any changes if they are financially advantageous.

Some changes they wouldn't like to do:

- Insulation of old house (must ensure the circulation of air to avoid mold)
- Insulation or plastic windows on historical house (it doesn't look aesthetic)
- Big building changes on a new house





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5. SOLAR PANELS



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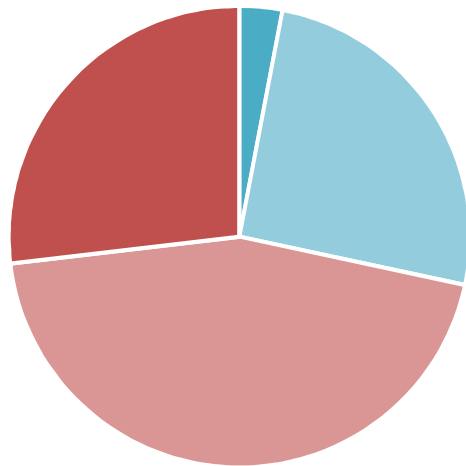
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Most respondents believe that buying solar panels would be difficult for them. They expect higher price than they can afford.



Buying solar panels would be for me ...



* %

N = 67 (those, who do not have solar panels)

■ Very easy ■ Rather easy ■ Rather complicated ■ Very complicated



As I have already written, I do not have panels for the financial reasons, but now I realize that I have not yet been interested in detailed spending, implementation possibilities, possible subsidies, etc. And maybe that's my fault.

Even though most of our respondents like the idea of having solar panels at home, most of them think, buying them would not be easy.

This conviction comes from the main barriers – especially lack of finance. On the other side – those, who already have solar panels, usually bought them for one reason – to save money.

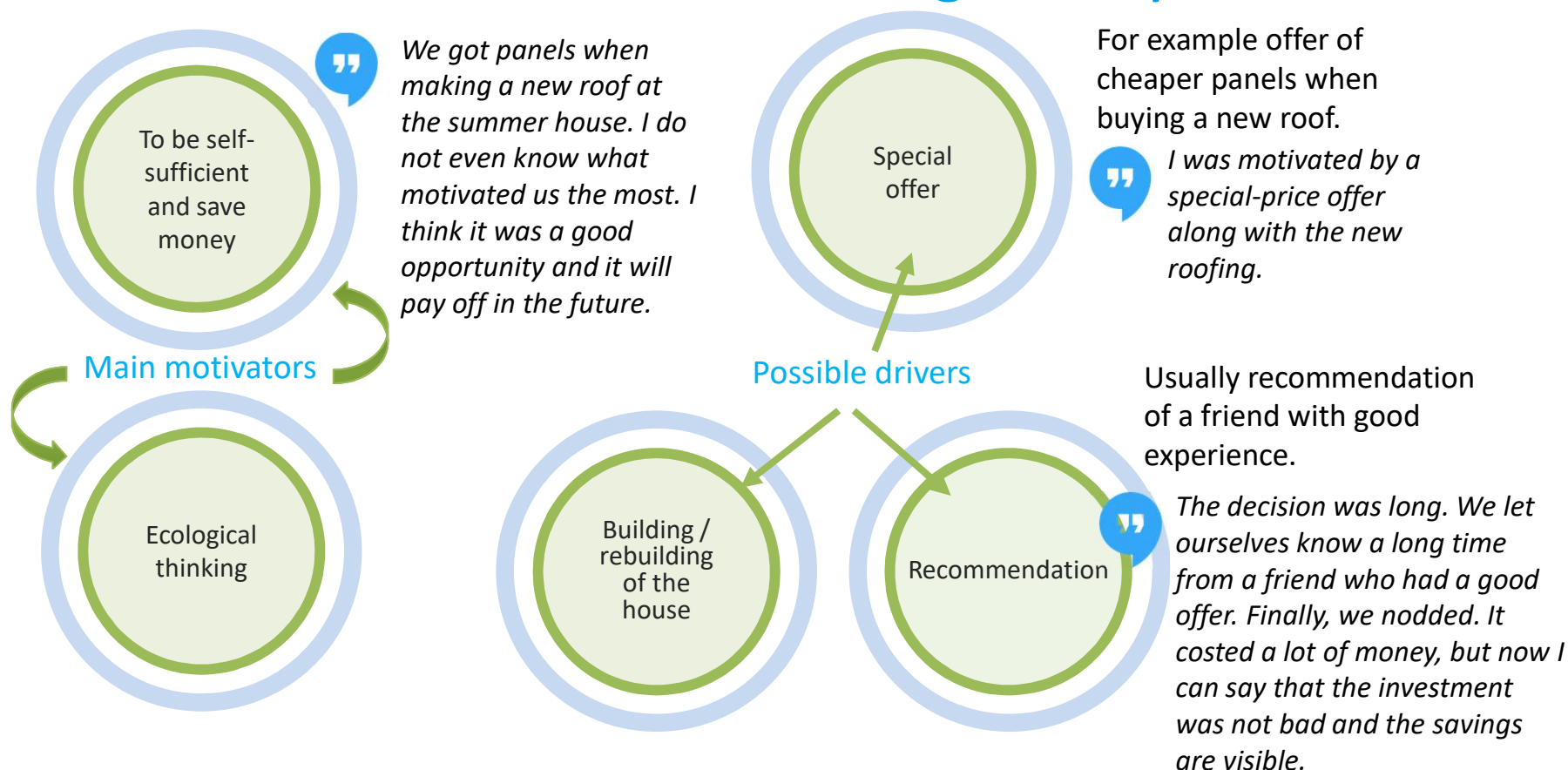




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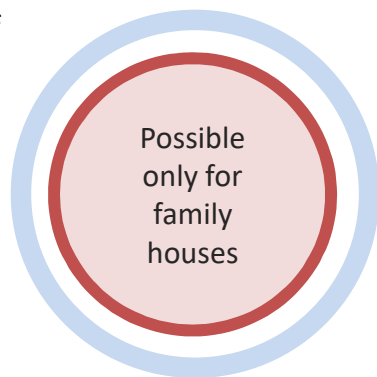
Main drivers for buying solar panels are mostly connected with the idea of saving money.





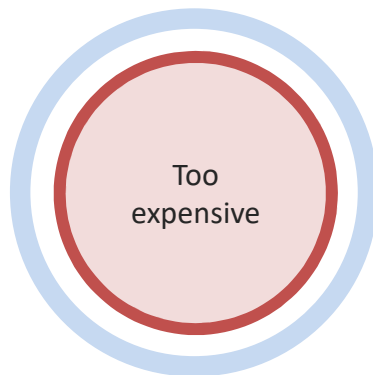
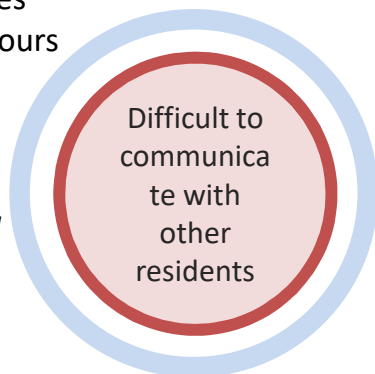
Main barriers for buying solar panels

People living in apartments in block of flats and those having passive houses don't think they can have solar panels.



I'm not excited about the idea of changing the look of the building after installing the panels on the roof.

Owners of apartments in tenement houses think their neighbours would not like it.



I live in a blockhouse - I do not decide on such projects myself.

Some people feel that it is not worth it for them if they get their investment back in many years – especially those who are thinking about panels for example for their summer houses.





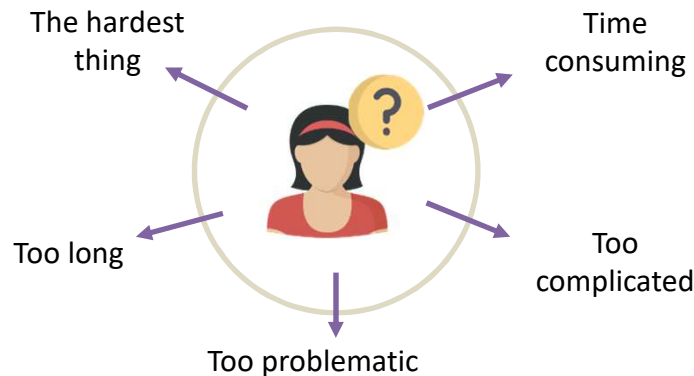
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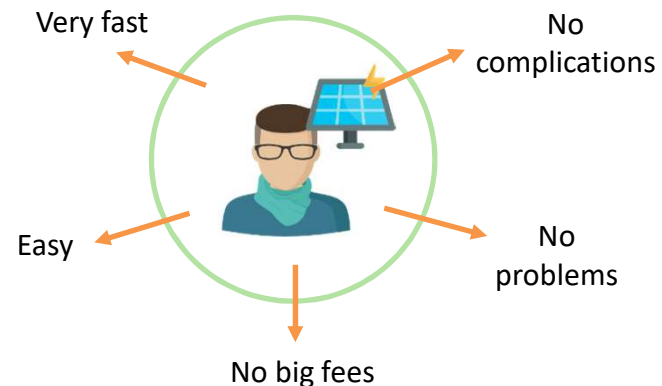
In terms of administration, there are great differences in expectations and real experience.



Inexperienced



Experienced



Administrative process seems to be one of the biggest complication in the eyes of those, who have no experience with solar panels.



I think that this would be the most complicated thing, the administration ... Of course, the contractor would not like it. I would see problems for example in the notice period.



The respondents, who already have solar panels, usually don't remember any problems in administrative process.



There are no complications when requesting in the right order. Usually, it is up to the company to arrange everything for you. There are no fees.





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In the Czech Republic, it is currently possible to get subsidy for:

- Biomass stoves with self-supplying fuel (pellet stoves)
- Heat pumps (all types)
- Biomass stoves with manual fuel supply
- Gas condensing stoves
- Combined coal and biomass stoves with self-supplying fuel



6. ECOLOGICAL STOVES



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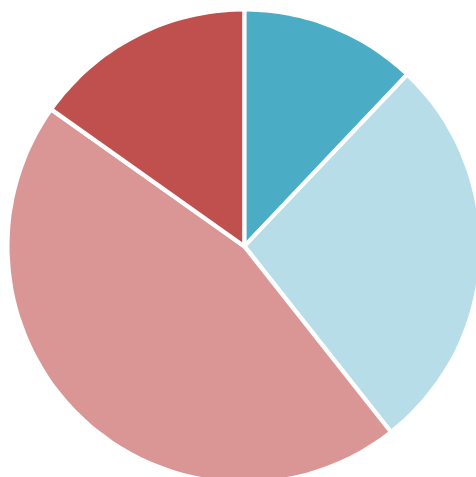
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Buying a pellet stove is perceived a little less complicated than buying solar panels, because people already have experience with some other kinds of stoves.



Buying a pellet stove would be for me ...



* %

N = 66 those, who do not have pellet stove

■ Very easy ■ Rather easy ■ Rather complicated ■ Very complicated



I think it would not be too complicated, and I would not expect any major complications. Certainly, there are enough specialized companies to bring, install, start up the stove ...

Even though more than half of the respondents think it would be rather/very complicated for them to buy a pellet stove, it **seems to be a little bit easier than the case of solar panels**. People already have some (different) kind of stoves at home so **they don't expect any bigger problems** in changing it or in administrative process. They also expect there is some company which takes care of everything (administration, installation).

Respondents don't expect any problems from the side of current energy/heating supplier (they suppose the supplier would not care very much).



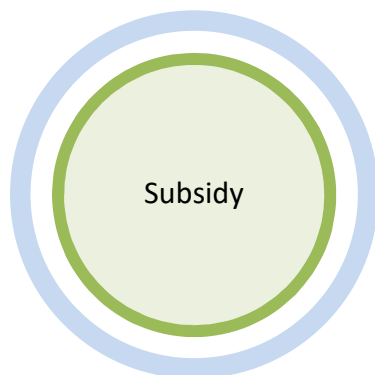


Main motivators for buying ecological stove



Respondents always want to save money so the main motivator is, again, savings. Those, who already have ecological stove are usually happy about savings connected to better heating than in the case of older stoves.

“ We have combined pellet stove and are really excited about it, the costs are half compared to before.



“ The main reason for the purchase was the subsidy. If we did not get it, we certainly bought a cheaper solid fuel stove.

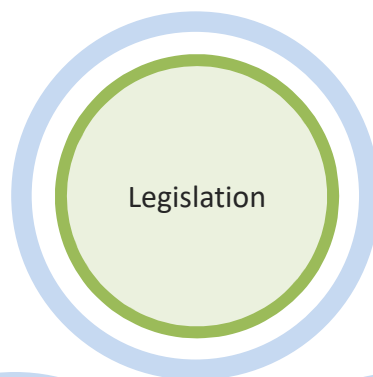
“ The installation would be convinced by some subsidies or a favorable price and a combination of different things to the heating.





Another possible drivers for buying ecological stove

Need to reduce exhaust emissions (there are compulsory controls, and in case of non-compliance there is a risk of fines).



“ Because the old stove was broken and the subsidy program was announced. And we have tried to save, reduce exhaust emissions and comply with legislation.

“ We took a small stove for our cottage. What led us to this was that the one at the cottage was badly functioning, so we had to get a new one.



“ It warms itself basically unattended, only to be occasionally accompanied Especially because the pellet boilers have their own automatic hoppers and basically can attach themselves, so the operation is very simple, comfortable and clean.





Main barriers for buying ecological stove



Impossible
for every
type of
housing

Respondents living in blocks of flats, small apartments and passive houses don't think this stove is possibility for them. Especially those with common gas boiler room and central heating.

“ We do not have such a stove, we have never thought about getting it. We live in a passive house, this type of heating would not even be suitable.

“ There is no room for the stove or fuel supply in the house.

Too
expensive

Especially people who invested in new heating lately don't want to buy a new stove. They also think it would need some changes in the house and it would be too expensive.

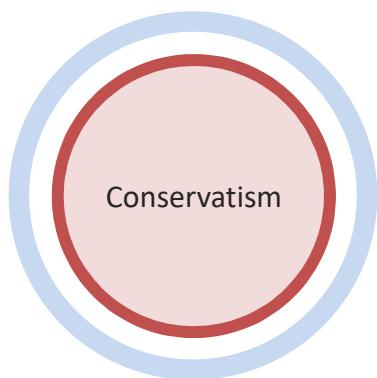
“ For us, the finances are limiting. It is the first, the dumping of the chimney, secondly, request to enter the company that conducts stove installation under „Zelená úsporám“, the third approval of subsidy.

“ The second option was to buy a boiler at, for example, an eon, which also offered this service, including assembly and posting, etc. The customer just signs and pays. But the same type of boiler as the boiler seller was about once so expensive, so in the end the contribution will remain an eon for work and handling.





Another possible barriers for buying ecological stove



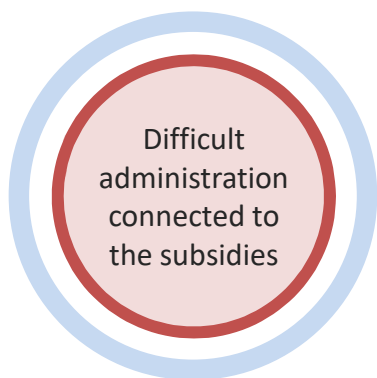
Especially older people don't want to change their type of heating because the whole process would be too difficult for them. They usually prefer gas boiler, they are used to it and don't want to change it. It is perceived as simple solution.



Due to my age and health problems, I consider gas to be more appropriate for me.



I have never solved it because we are using gas and there are no subsidies for gas stoves, at least so I was told about „Zelená úsporám“.



I would have received a subsidy for an environmental stove, but I would have discouraged a complicated administration. I think so, given the queues in the office where the subsidies are being handled. It falls under the state administration and there is everything complex and "paper-intensive".





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Administrative process as such seems to be easier than in case of solar panels. Administration connected to subsidies is perceived as difficult.



Those respondents, who don't have any experience, usually don't expect any bigger complications in administration or installation of ecological stove. Those, who have the stove at their homes, confirm these expectations – there were no struggles with installation or administrative process. Those who expect complicated administration derive more from the fact that any administration is complicated for them.

I have no idea what the need for permission to do, but any action at the authorities is a martyrism, it takes long time, there is a need for a pile of papers. It would have discouraged me from acquiring the stove.

Getting all the necessary documents, filling in the application, office, queues, finding that I have something wrong filled or I do not have a document, once again the office, finding that I am not entitled to the subsidy or not the amount I expected.



People don't expect any problems with current energy supplier. When it comes to subsidy for the stoves, the non-experience group expect complications. And the other group is again, unfortunately, sometimes confirming.



I imagine that if I made a queue and got the subsidized stove, then there would be a pile of forms, a regulation on choosing an appropriate company, installing a stove, reviewing, etc. I am rather sceptical, I think it would be quite complicated, even if the experience is missing.

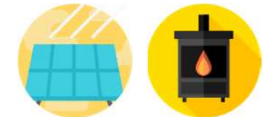


We had a problem with the payment of the subsidy. We have documented everything, but the subsidy did not pay us on time. After an emergency, we were told that after they physically check the stove, the subsidy will be paid within 14 days. But the date of the check won't be sooner than in a month. So the contract with the region was nothing if they did not respect what they had committed themselves to.





Subsidies



People generally don't have much information about possible subsidies. They know there are some but they expect difficult administrative process connected to the application and the subsidies are sometimes also associated to uncomfortable experiences (e.g. uncomfortable waiting in long queue for getting the subsidy – only limited number of people can get them).

Some of our respondents think they cannot get subsidy:



Contributions and subsidies are a lot conditional, as I wrote about the last question, unfortunately I did not get any, I didn't meet conditions because I would have to make a facade - I cannot afford it, so it is nothing to me.



I do not have enough information, but maybe I have to meet certain criteria. E.g. have plastic windows or house insulation to prevent unwanted heat leakage. We do not have that, so we have not dealt more.

Some of them are scared they will not get the subsidy afterwards:



I am not even sure, if I get the money after the realization... that is the biggest problem. What if I won't get it?



It seems that subsidies are more important in a case of stoves – because stove is something people really need. **Most of our panel-owners did not base their decision to buy the panels on the idea of possibility of getting subsidy.**





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7. PROFILES AND RECOMMENDATIONS



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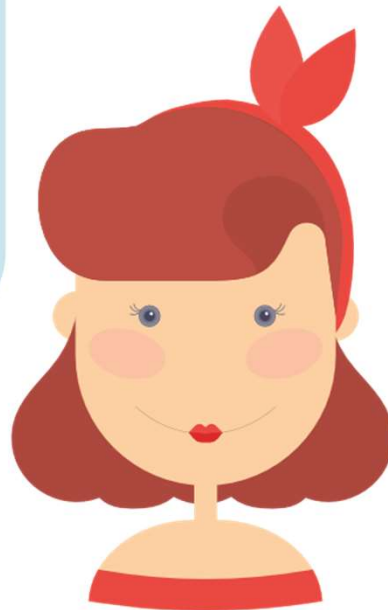
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This is Markéta.

Markéta is 31 years old and she lives in middle-size town with her family – husband and one child.

Markéta's son is one year old, she is on maternity leave right now.



Markéta is trying to save energy – so she changed light bulbs and appliances in order to save money, but she would also like to live more environmental-friendly. Unfortunately, she does not think she can do much more than she is doing right now, because her family lives in block of flats and also she is not working now, so her funds are limited.



What to do for Markéta?

Help Markéta to find the most suitable option for her so she will be able to act more environment-friendly in the future. She should get help with finding this option so she doesn't have to do it all by herself.



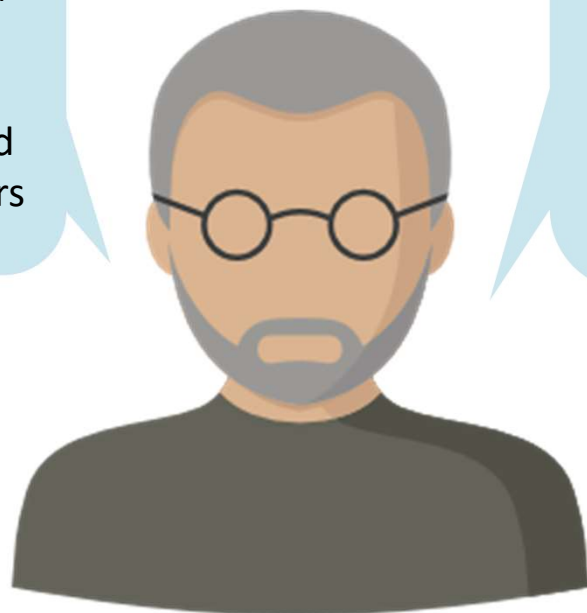


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This is Václav.

Václav is 56 years old and he lives in a countryside. Václav lives with his wife and two teenage daughters in a family house.



Václav bought ecological stove couple of years ago and he is very satisfied with it. He is also thinking about solar panels for his family house but he cannot afford them yet because taking care of family house costs a lot of money. He is currently saving for them. He is a fan of environment-friendly living and he would like to save money in the future as well.



What to do for Václav?

Support Václav in his decisions and make the implementing process as easy as possible for him. It should be clear for him what kinds of subsidies he can get.





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This is Pavel.

He is 36 years old and he lives in the capital city, Prague. He lives in his own apartment together with his girlfriend and cat called Julie.



Pavel would like to live more environment-friendly, but he doesn't know his options very well. He knows there are some subsidies for solar panels, but he suppose, buying them would be too time-consuming for him – because of difficult administration. He is also not sure if he can use solar panels for his apartment.



What to do for Pavel?

Communicate clearly the conditions for getting subsidies and let Pavel know that there are professional companies which can help him and go through the administrative process for him.





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People are not informed enough about their options.

The main barriers for acting more environmental-friendly are:

→ **Finance**

(subsidies are unreachable)

→ **Administrative process**

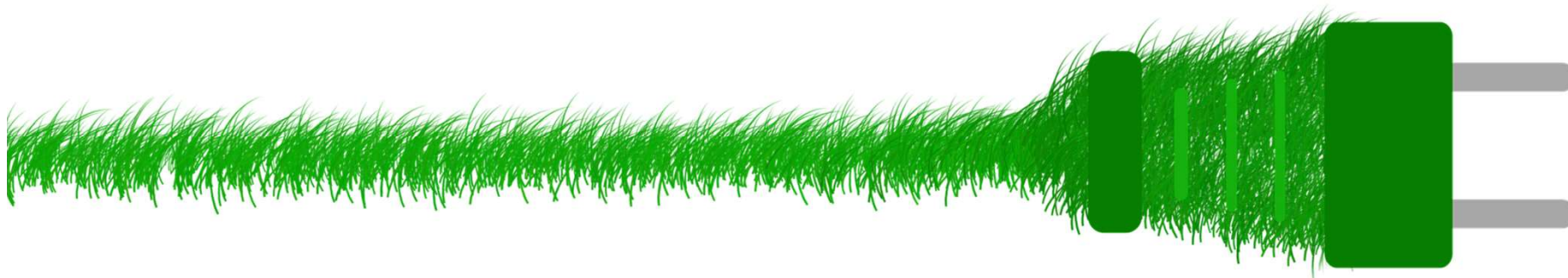
(too complicated)



Subsidies – should have the simplest **administrative**

process and clear rules.

Mainly it is important to **communicate** what the possibilities are and how simple it is (+ specific details about the length of the process, etc.)





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We make sense

NMS Market Research is a Czech and Slovak market research agency that provides complex services across various research methods and techniques. NMS conducts quantitative, qualitative and combined research projects, is great at Mystery Shopping and enjoys developing special solutions, tailor-made to their clients.

Everything NMS does has one thing in common: we are able to quickly process a number of different kinds of information and offer meaningful and relevant solutions to even the most complicate problems.

Put shortly, with NMS things make sense.



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