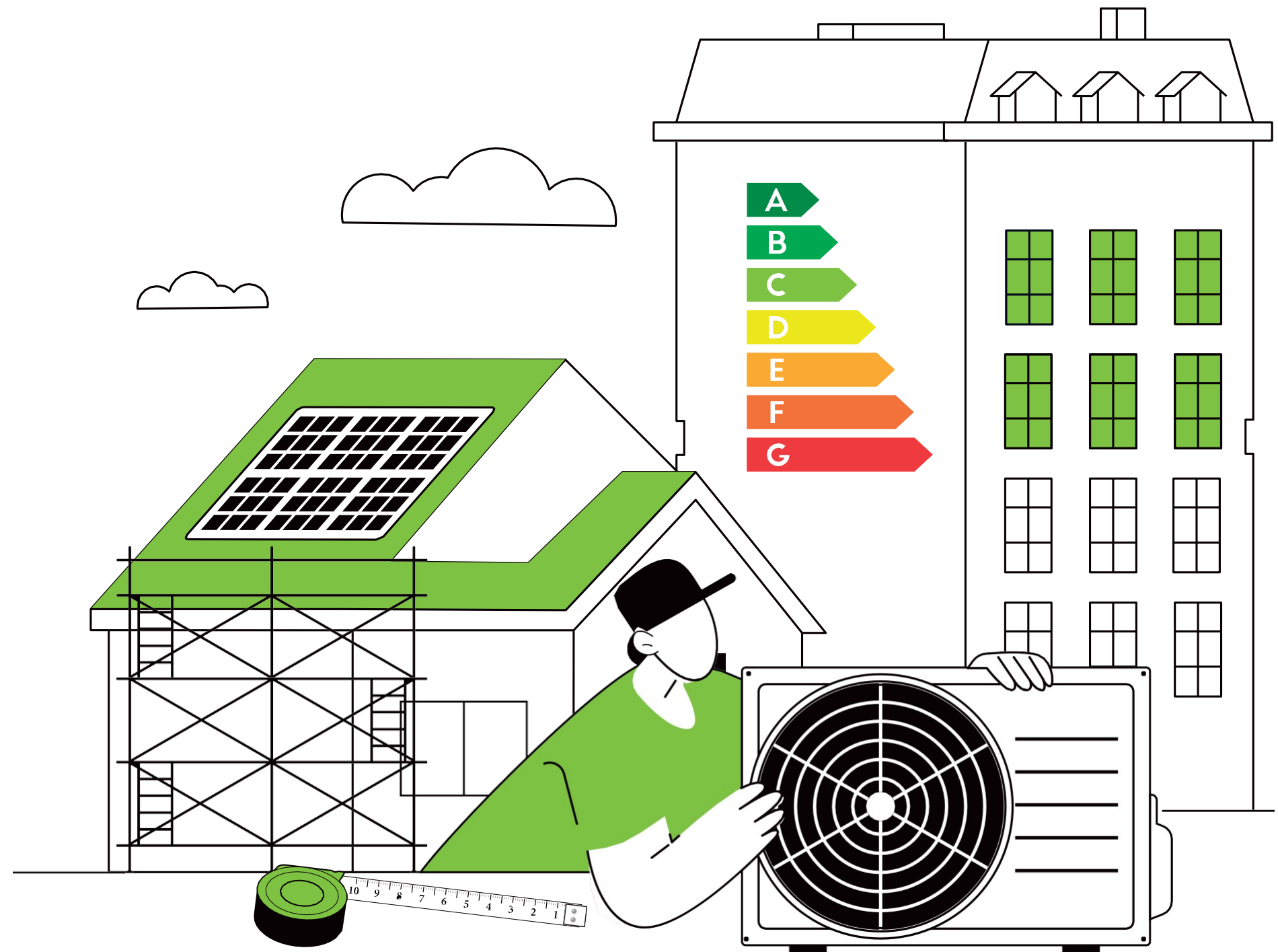


2024

HABITAT



# Energy Renovation: a desirable change of scale

**OBSERVATOIRE**  
Cetelem

# METHODOLOGY

## METHODOLOGY



**Quantitative** consumer interviews were conducted by Harris Interactive in **March 2024 in 8 countries**: Belgium, France, Germany, Italy, Poland, Portugal, Spain and United Kingdom.

In total, **13,000 individuals** were interviewed online (CAWI method). These individuals, aged 18 to 65, were drawn from national samples representative of each country. The quota method was employed to ensure that the sample was representative (gender and age). 3,000 interviews were conducted in France and 1,500 in each of the other countries.

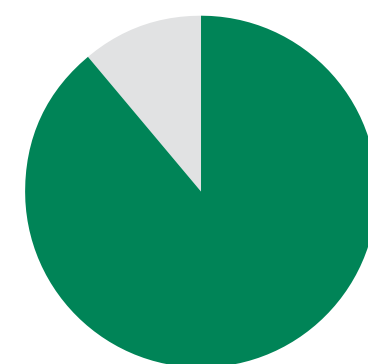
# 4 QUESTIONS EXPLORED IN THE SURVEY

- 1 How do Europeans perceive their housing?**
- 2 What efforts are they making to reduce energy consumption?**
- 3 Are Europeans mobilized to undertake renovation work?**
- 4 What are the levers to speed up energy renovation?**

# 1

## How do Europeans perceive their housing?

# GIVING PRIMACY TO COMFORT



**89%**

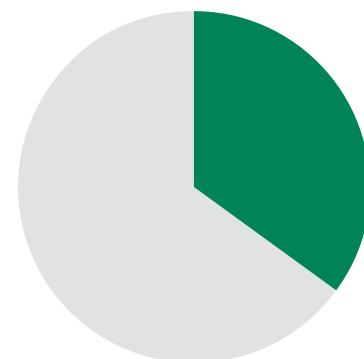
of Europeans are generally  
satisfied with their accommodation



**1 in 2**

Europeans holds comfort  
as their 1st satisfaction criterion

# A CONCERN ABOUT ENERGY EXPENDITURE



**35%**

of Europeans face difficulties related to housing expenditure



**4 out of 10**

consider their energy bill excessive

# 2

**What efforts are they making to reduce energy consumption?**

# A WILL TO MASTER ENERGY CONSUMPTION



**63%**

of Europeans consider their energy budget to be optimized

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**1 in 2**

Europeans monitor their energy consumption via an individual application or meter



# BY SYSTEMATICALLY CARRYING OUT SIMPLE & LESS CONSTRAINING ACTIONS...



**74%**  
turn off the lights when leaving a room



**58%**  
close windows and shutters  
when it is cold or very hot



**58%**  
install low consumption light  
bulbs...

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... while only **36%** have  
lowered their heating temperature

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# ... WHIT LIMITED RESULTS IN THE END



**1 in 2**

believes that these actions are insufficient  
to achieve significant energy savings

# 3

## Are Europeans mobilized to undertake renovation work?

# A MAJORITY OF EUROPEANS HAVE ALREADY DONE OR INTEND TO DO RENOVATION WORKS



**46%**

of Europeans have already carried out energy renovation work in the last 3 years

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**28%**

plan to do so within 3 years

# TOP 3 MOTIVATIONS



**33%**  
Financial savings

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**30%**  
Gain in comfort

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**21%**  
Ecological conviction

# SMALL, LOCALISED WORKS PREDOMINATE TODAY

**38%**

of Europeans owners have done small, fairly localised renovations and major renovations

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**42%**

of them owners have done only small, fairly localised renovations (door, window or floor insulation)

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**20%**

of them have done major renovations (change of heating system, change of windows, insulation of walls and roof or installation of solar panels, etc.)

# SMALL SCALE RENOVATION WORKS

## MOST PERFORMED WORKS: TOP 5

47%



Windows

31%



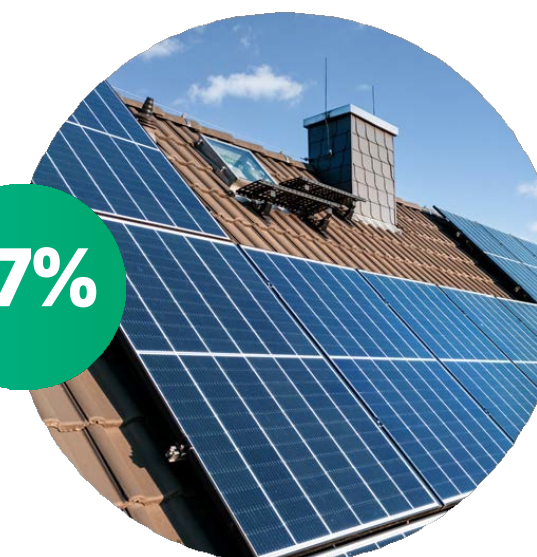
Insulation  
work

29%



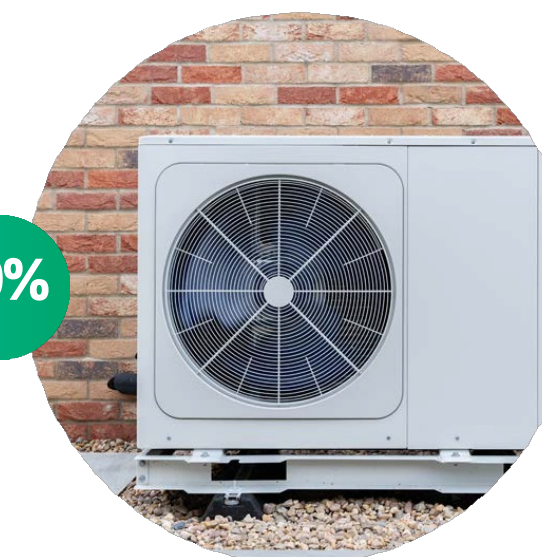
Boiler  
replacement

27%



Photovoltaic  
panels

19%



Heat pumps

**57%** of owners  
invested less than €10,000

**82%** expect to reduce their  
energy consumption by 25% or less

# 4

**What are the levers to speed up energy renovation?**



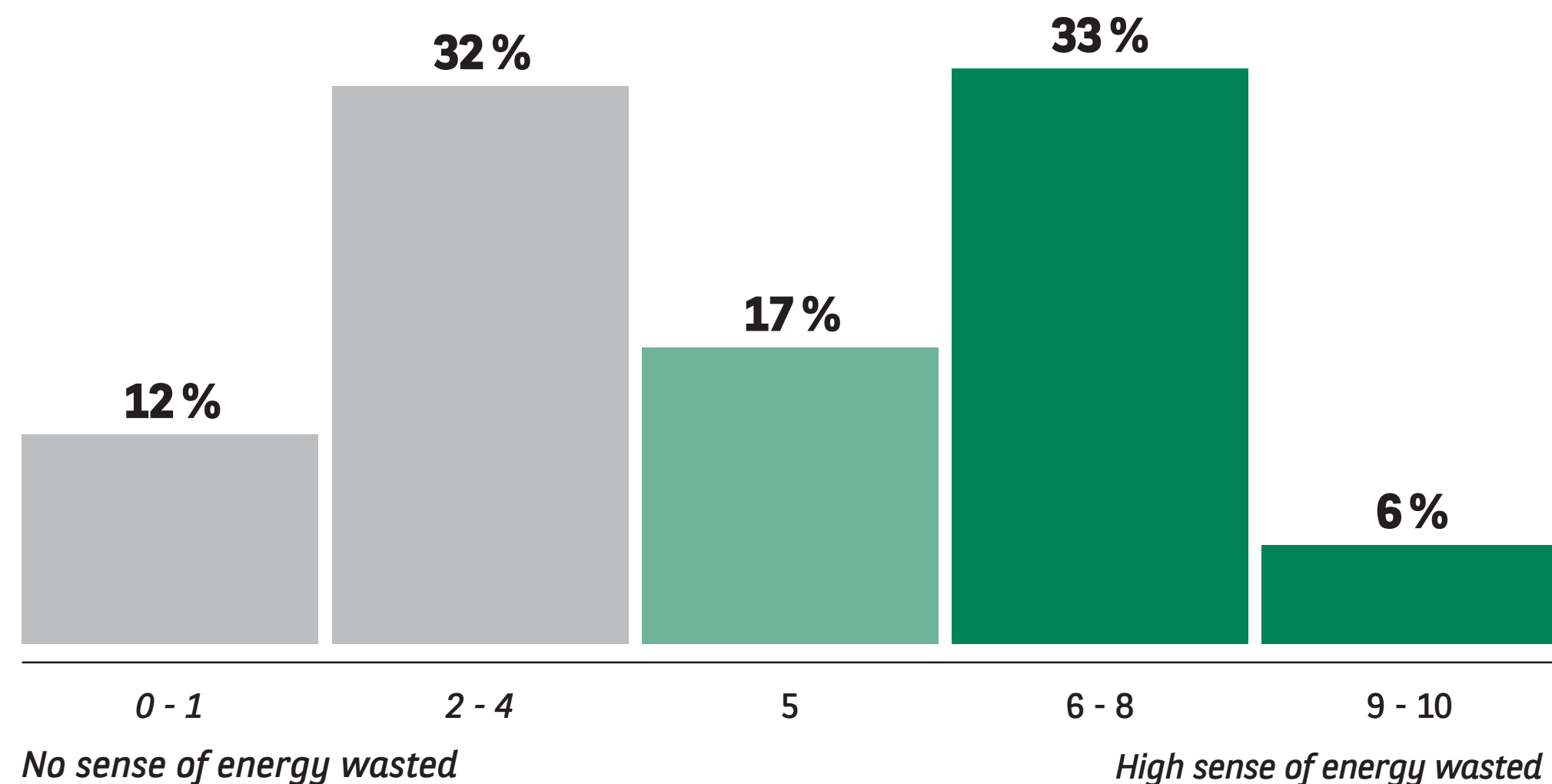
# 4.1

## Increasing awareness of energy waste



# AN UNDERVALUED SENSE OF ENERGY WASTE AMONG HOMEOWNERS

**39%** of owners  
have a significant feeling  
of energy wasted



On a scale from 0 to 10, to what extent do you feel that energy is wasted in your home (due to poor insulation, excessive energy consumption, lack of good habits practiced, etc.)?

# DRIVEN BY A LACK OF KNOWLEDGE OF THE ENERGY PERFORMANCE OF ITS HOUSING



**51%**

of European owners report  
knowing their EPC

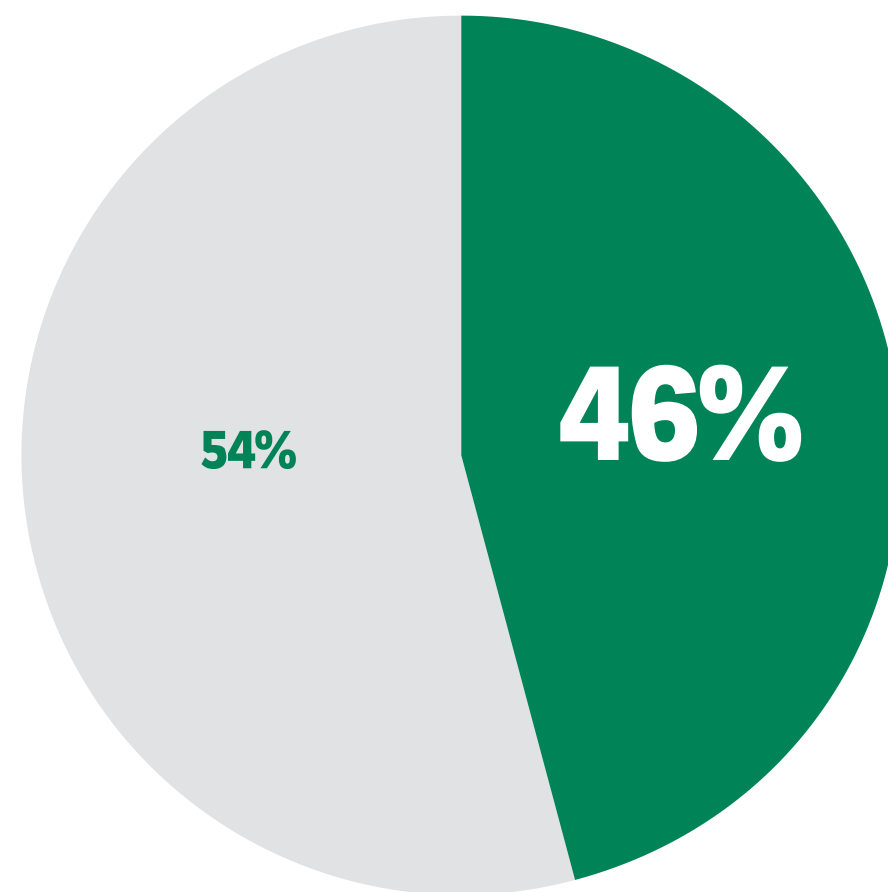
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Of these, **31%**  
declare an A or B EPC

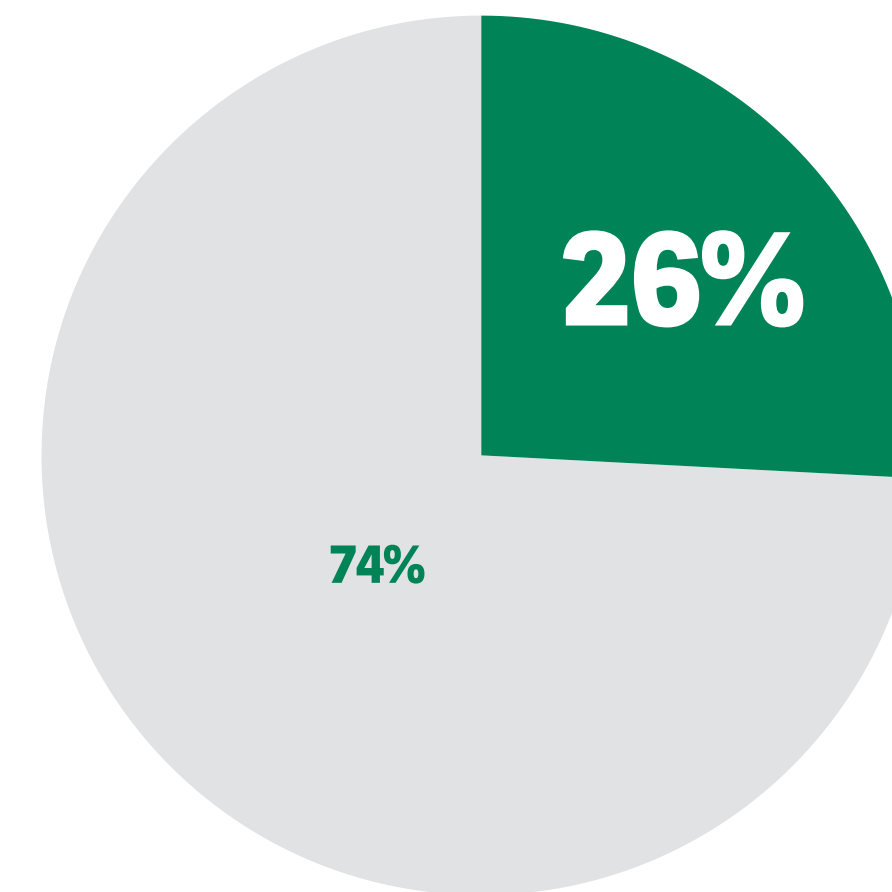
# A CORRELATION BETWEEN THE SENSE OF ENERGY WASTE AND WILLINGNESS TO CARRY OUT WORK

## Owners

Who are planning work



Who do not plan to do work



- No / limited sense of energy wasted
- high sense of energy wasted

On a scale from 0 to 10, to what extent do you feel that energy is wasted in your home (due to poor insulation, excessive energy consumption, lack of good habits practiced, etc.)?

# 4.2

**Increase the information gap at the financial level**

# AN UNFAMILIAR SUBSIDIES SCHEME



**63%**

say they know about public subsidies...

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But only **15%**  
see precisely what it is

# MAINLY SELF-FINANCED



**48%**  
Use of savings

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**26%**  
Subscription of a loan

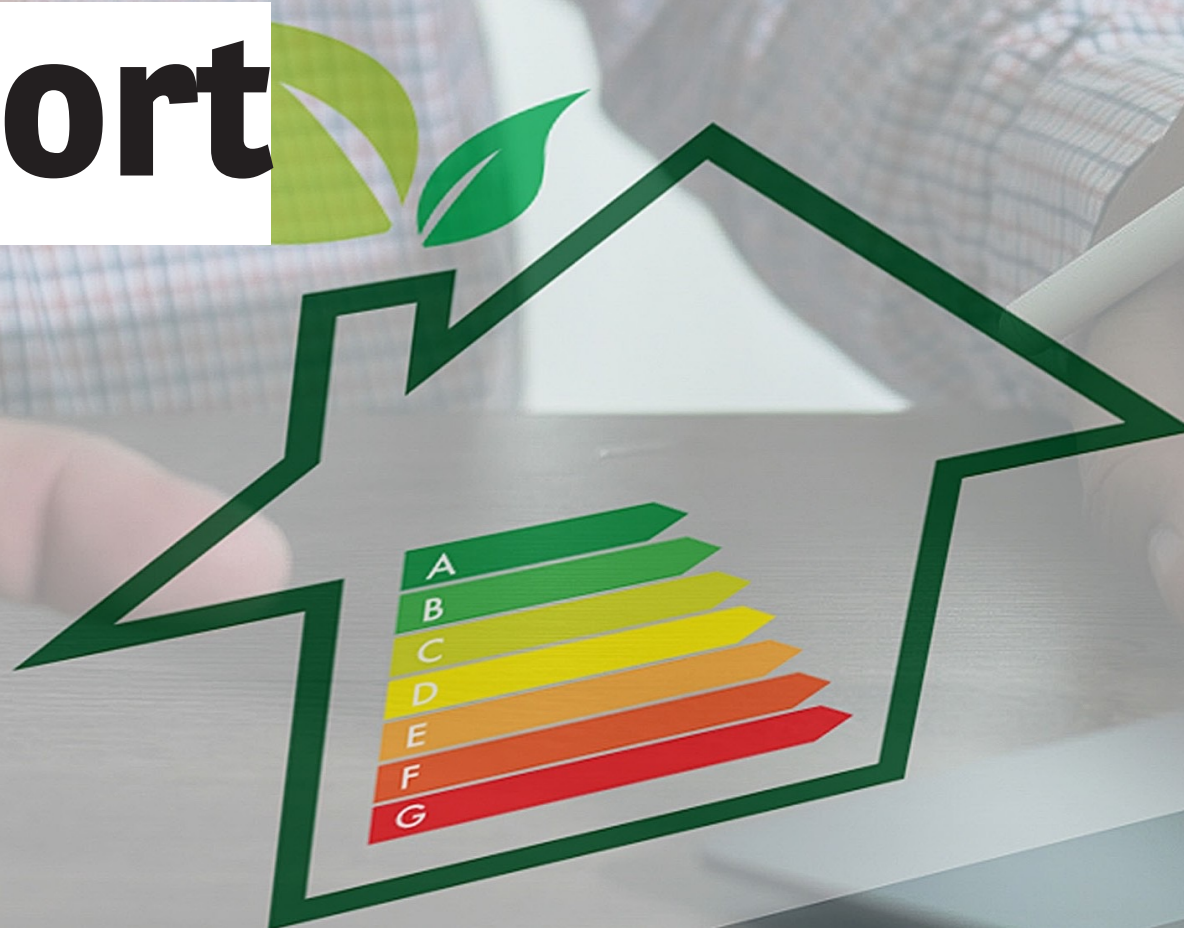
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**25%**  
Use of public subsidies

# 4.3

**...and ease support**





**BARELY A MAJORITY OF  
EUROPEANS FEEL  
“WELL INFORMED”  
ABOUT THE MAIN  
PHASES OF A  
RENOVATION PROJECT**

**55%**  
Potential  
savings

**48%**  
The amount to  
be invested

**44%**  
Actors to be  
approached

**42%**  
Public subsidies  
available

# TRUST PLACED IN THE PLAYERS ON THE GROUND

76%



Craft -  
installers

74%



Agregators  
& Renovation  
specialists

65%



Large building  
enterprises and  
manufacturers

55%



Energy  
suppliers

42%



The Banks

# A PLACE FOR BANKS



**80%**

of Europeans believe that banks should support them from start to finish in their energy renovation project

**TO CONCLUDE ...**

## **... INGREDIENTS FOR SUCCESS**

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**Increase efforts to better inform at all levels**



**Increase awareness of energy waste and renovation benefits**



**Work TOGETHER to support European customers**