



APARTMENT BUILDING RENOVATION SURVEY

Campaign follow-up survey report

Ordered by KredEx

April 2011



Baltic Sea Region
Programme 2007-2013

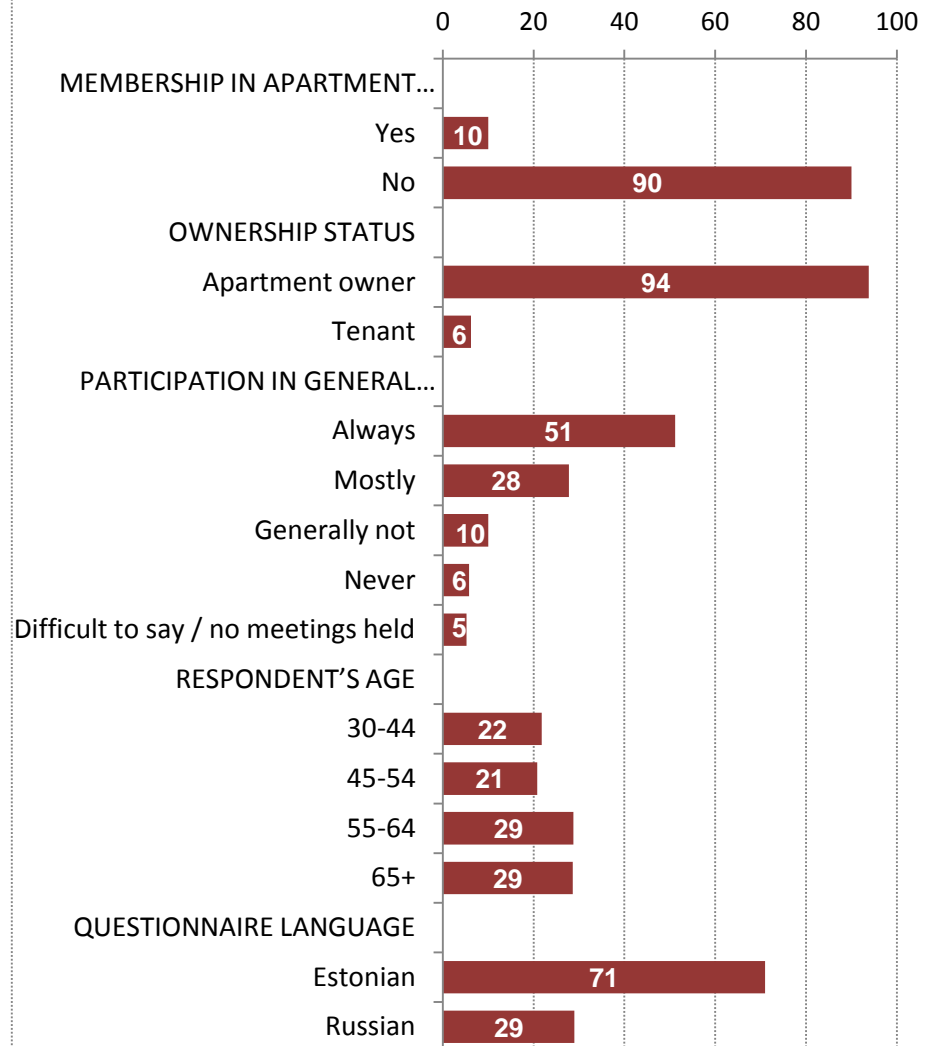
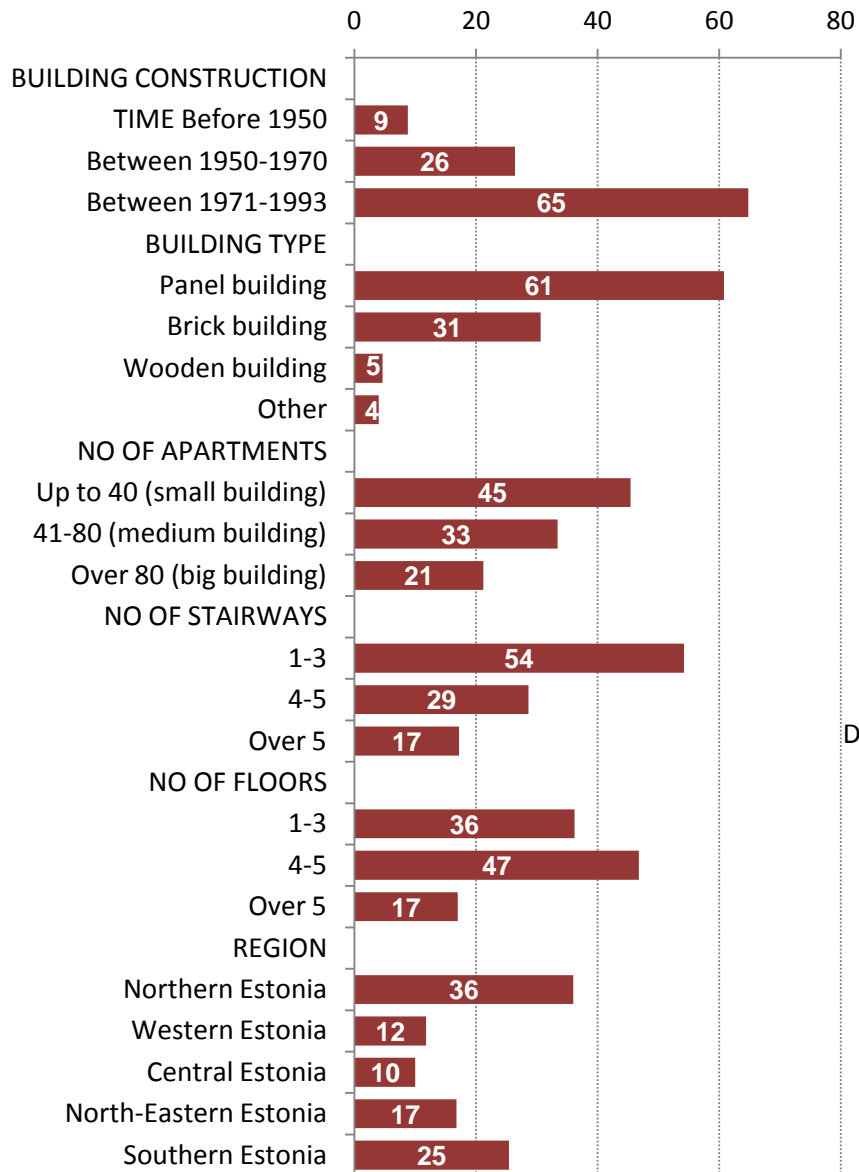
Part-financed by the European Union
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BACKGROUND OF THE SURVEY

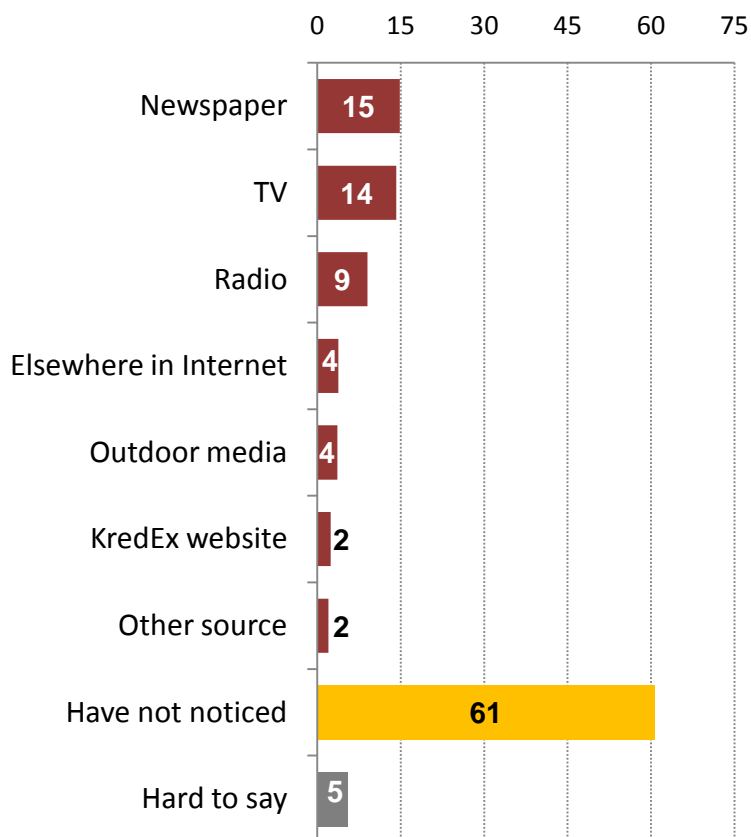
- **The task of the campaign follow-up survey** was to map the situation after the information campaign carried out in March: whether and where the campaign had been spotted, whether and how the attitudes towards renovation of apartment buildings had changed, what are the differences between target groups etc.
- **Methodology** (the same as in the preliminary survey carried out in January):
 - Target group: common residents in the apartment buildings built until 1993 (90% of the sample) and chairmen of board/members of apartment associations (10% of the sample); age 30+
 - Method of the survey: phone interview (so-called CATI)
 - Method of the selection: random selection for residents, random selection from the Krediidiinfo database - for apartment association board members
 - Number of respondents: 500
 - Time of survey: 4-8 April 2011

RESPONDENT PROFILE (%)



KredEx information campaign spotting

During March, KredEx conducted information campaign „Renovate as a whole, hit the nail on the head“. Have you noticed the campaign? If yes, where?
(%; multiple answers possible)

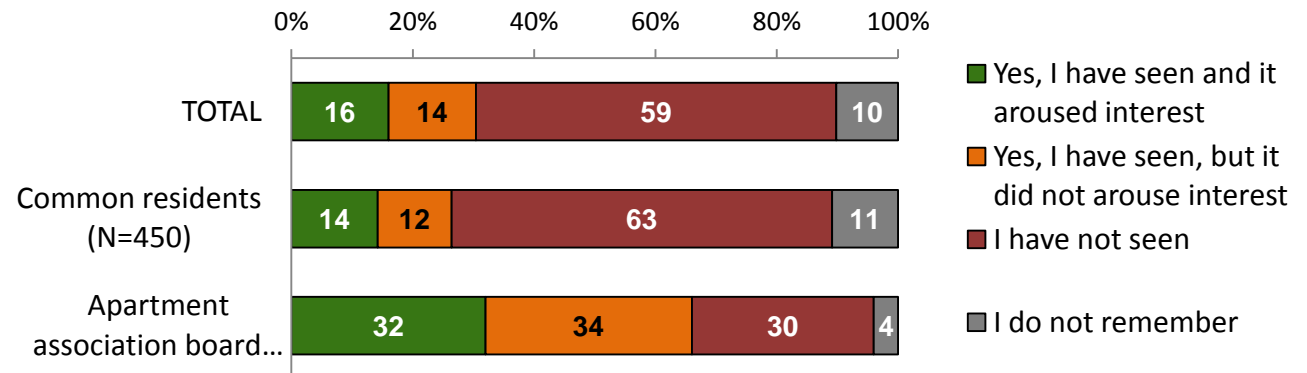


- The KredEx information campaign carried out in March was spotted by **34%** of respondents.
- Above average, the ad was spotted by:
 - apartment association board members (50%; 32% of common residents),
 - people from Western Estonia (42%; only 24% in Central Estonia),
 - the youngest or respondents aged 30-44 (39%),
 - Estonian-speaking respondents (36%; Russian-speakers: 28%),
 - residents living in newer, medium-sized (with 41-80 apartments) wooden or panel buildings.
- The campaign was mostly spotted in **newspapers, TV and radio**.
- In the preliminary survey, the respondents considered TV, leaflets placed in mailbox and newspapers as the best ways of renovation-related communication.

Spotting of information leaflet Terve Kodu (Healthy Home)

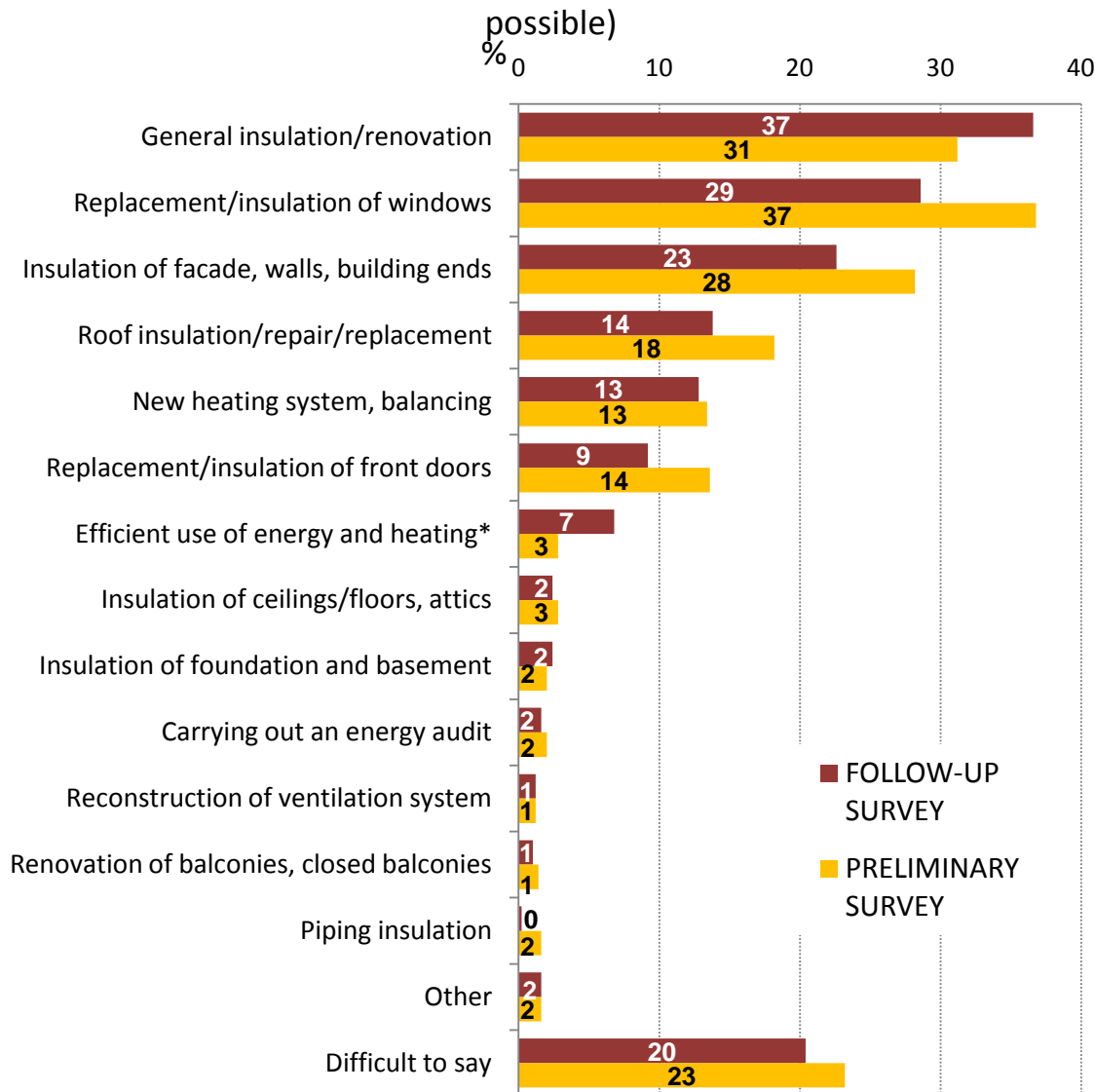
- In March, the information leaflet Terve Kodu dedicated to renovation of buildings issued together with some newspapers, was noticed by **30%** of respondents. It created interest in over half of them (16%).
- Above average, the leaflet was seen by
 - apartment association board members,
 - respondents in Western and Northern Estonia,
 - respondents aged 44 and over,
 - Russian-speaking respondents,
 - residents of medium-sized, newer and paneled houses.
- During the preliminary survey, 20% of the respondents said that they had seen the leaflet Terve Kodu issued in November, and to half of them (11%) found it interesting.

In March this year, together with county newspapers, Postimees and Den za Dnjom, information leaflet on renovation Terve Kodu was issued. Have you seen such a leaflet and was it interesting for you?



Energy saving opportunities in apartment buildings

What are – to your knowledge – the most important activities apartment buildings can save energy with? (%; multiple answers possible)

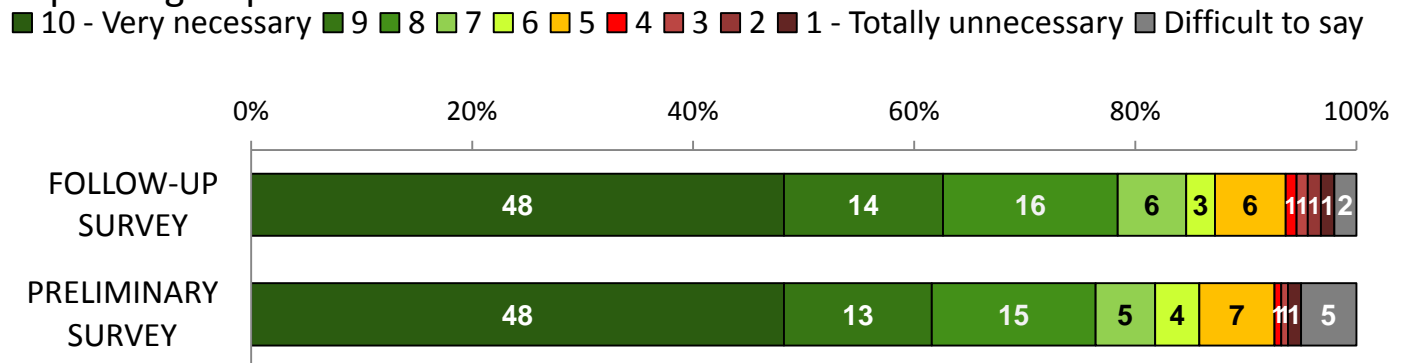


- In both survey stages, as energy saving opportunities, different activities related to **insulation of building** were mainly mentioned.
- In the follow-up survey, general insulation/renovation and energy efficiency were mentioned more than previously (* unlike previously, in addition to electricity, efficient heating was mentioned as well).
- Apartment association board members were more frequently able to mention various saving options than common residents.

Need for renovation to save energy

- The vast majority of apartment residents finds that renovation for the purpose of energy saving is **necessary**. Compared to the preliminary survey, no changes have occurred here.
- More than others, renovation was considered necessary by those listed below:
 - apartment association board members (the preliminary survey, however, showed no such difference),
 - residents in wooden buildings,
 - residents in buildings built before 1950,
 - residents in smaller buildings or with less than 40 apartments,
 - respondents less than 55 years,
 - Estonian-speaking respondents.

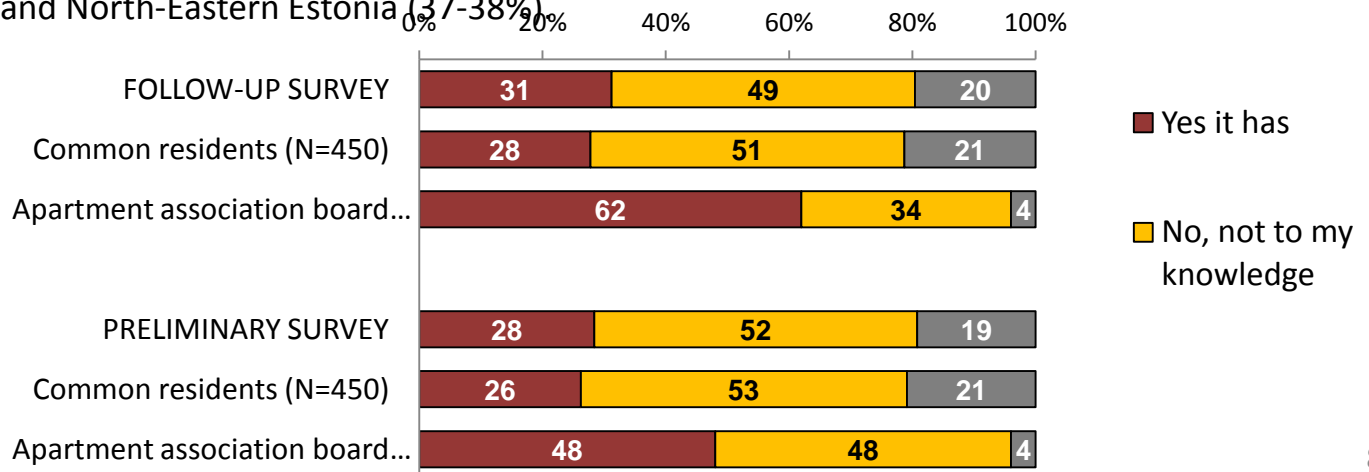
Do you personally consider renovation of apartment buildings necessary or unnecessary for the purpose of energy saving?



Conducting of energy audit

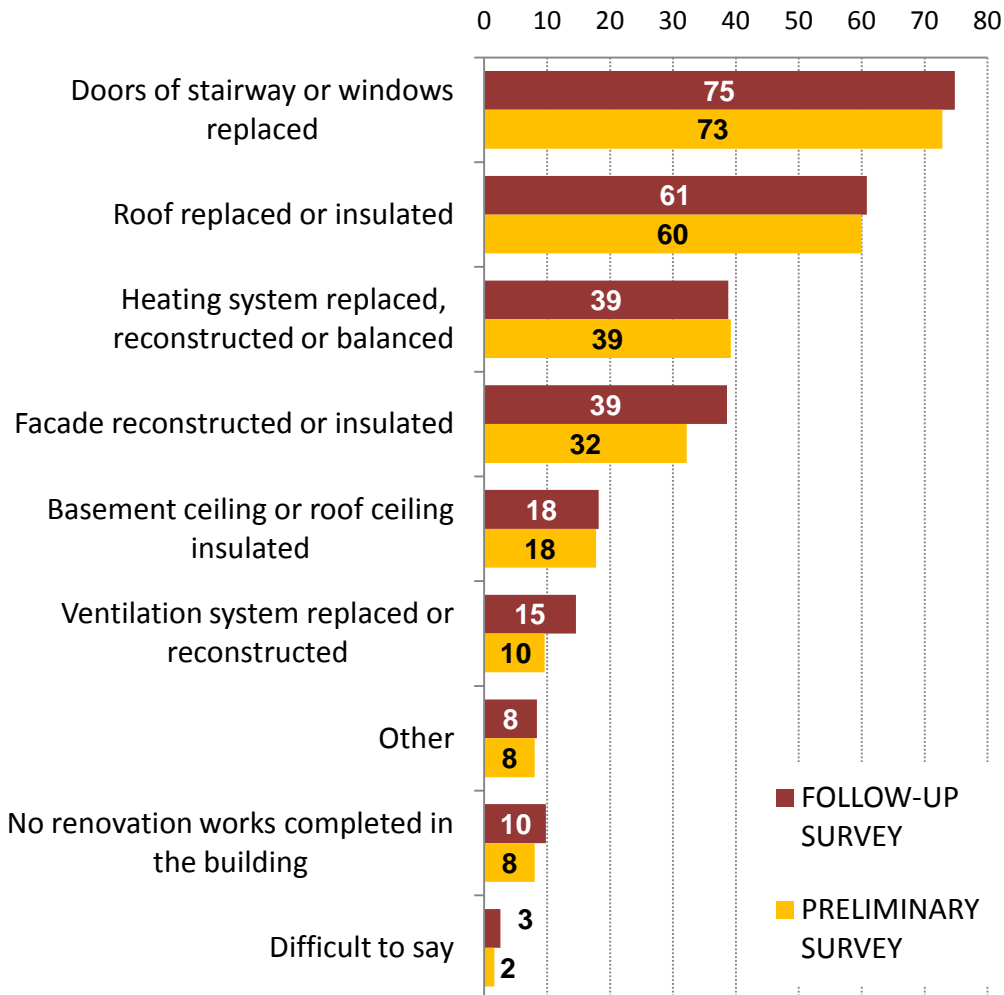
- According to respondents opinions, energy audits had been completed in less than one third of apartment buildings. In the preliminary survey, the value was close - 28%.
- Similarly to the preliminary survey, there is a big difference in the knowledge about conducting of an energy audit among apartment association board members and common residents; therefore there is reason to believe that all residents **may not be aware** of conducting of an energy audit.
- More often than on the average, energy audit was completed in:
 - houses with more than 40 apartments (38%; smaller houses: 22%),
 - newer houses (35% of those built in 1970-1993; 14% of those built before 1950),
 - paneled houses (34%; wooden buildings, houses: 9%),
 - Northern and North-Eastern Estonia (37-38%)

According to your knowledge, has an energy audit been conducted in your building?



Completed renovation works

What kind of renovation works have been completed in the building where you live? (%; multiple answers possible)

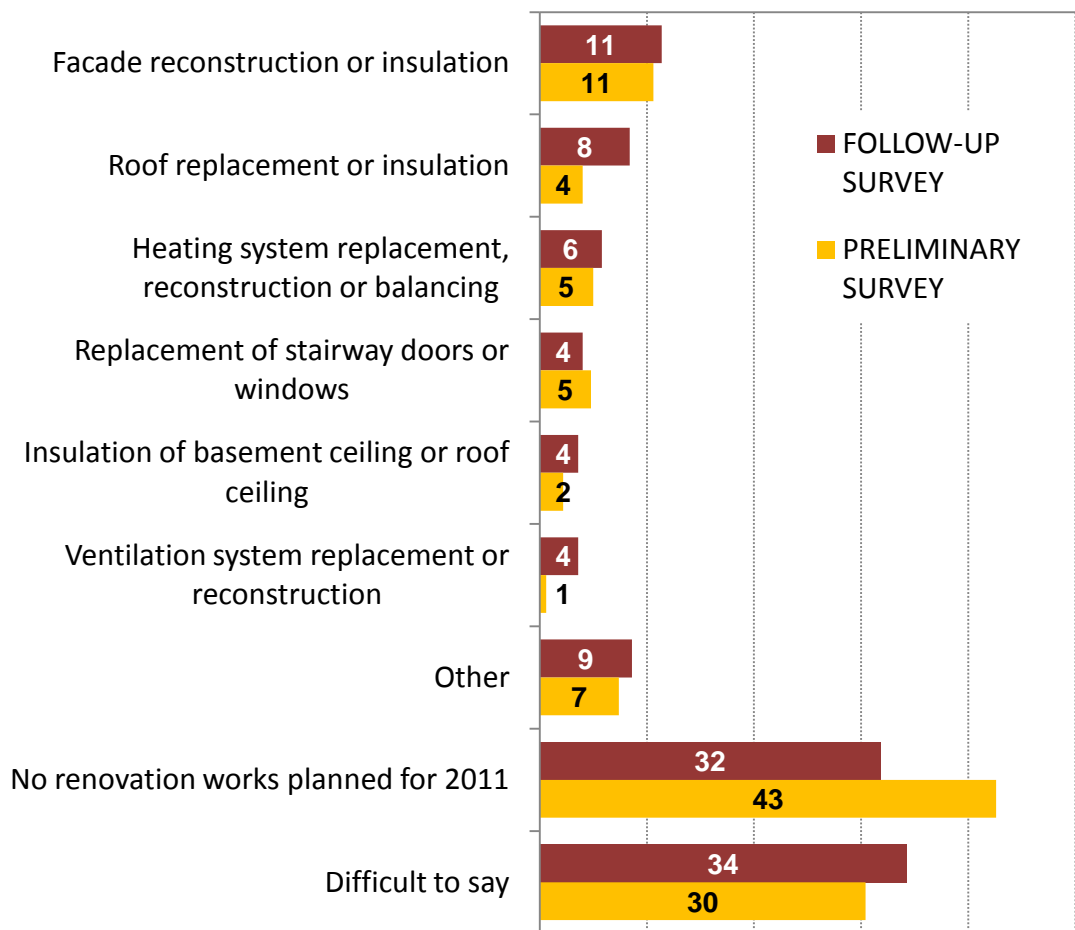


- In the greatest number of apartment buildings, **door of stairway or windows** have been replaced and **roof** insulated or replaced.
- Results of the two surveys are very similar: in the follow-up survey, only facade and ventilation works were mentioned slightly more than previously.
- No renovation works **have been conducted in 10%** of apartment buildings. Above average, it occurs in
 - buildings constructed before 1950, and wooden buildings (30% in both groups)
 - buildings with less than 40 apartments (19%),
 - regions outside Northern Estonia (13%; Northern Estonia: 3%).
- Main **reasons** for non-renovation are lack of money (71%) and lack of consensus among residents (27%).

Planned renovation works in 2011

Are you aware of any renovation works planned to be conducted in your building during 2011? What kind of works?

(%; multiple answers possible)



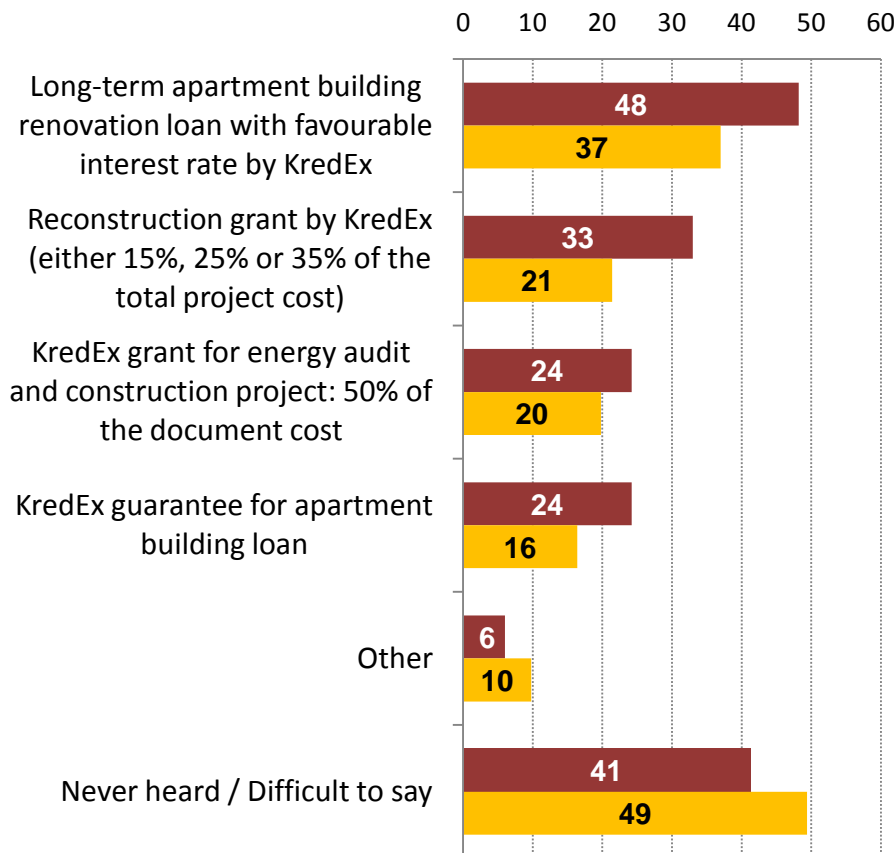
- In 2011, according to the follow-up survey some renovation works are planned **every third** apartment building (34%). In the preliminary survey, 27% of the people answered the same way. In both cases, more different works planned were mentioned by apartment association board members.
- The most common planned works are facade- or roof-related.
- Pursuant to the follow-up survey, there are renovation works planners mostly in:

 - buildings constructed before 1950 or between 1971 and 1993,
 - houses with up to 80 apartments,
 - wooden buildings,
 - Western Estonia.

Awareness of different financing measures

Do you know what financing measures, in addition to residents' own resources, can apartment associations use for renovation?

(%; multiple answers possible)

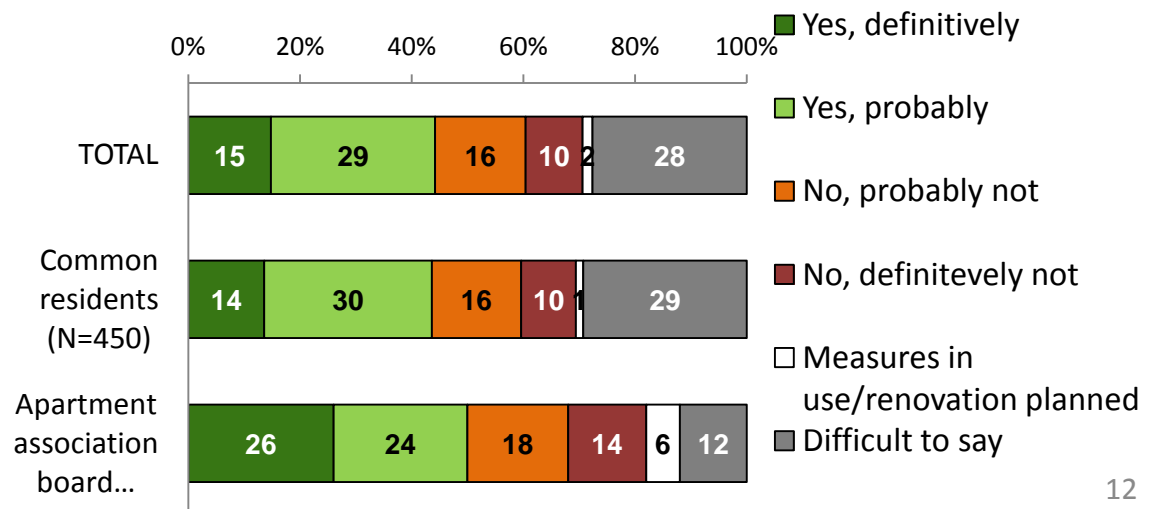


- **55%** of the respondents had heard of at least one financing measure offered by KredEx. During the preliminary survey, the figure was lower – 43%.
- The most known is the **long-term apartment building renovation loan with favourable interest rate** by KredEx.
- In the follow-up survey, above average frequency, no financing measure was mentioned by:
 - residents of big buildings (with over 80 apartments),
 - residents of buildings constructed between 1950 and 1970,
 - residents of Central Estonia,
 - seniors (65+),
 - common residents-respondents.
- In addition to those provided by KredEx, bank loan as well as local government grant

KredEx grant as a motivator for renovation

- **44%** of the respondents found that the up to 35 per cent non-refundable reconstruction grant offered by KredEx is a sufficient motivator for conducting renovation in their apartment buildings.
- Compared to common residents, more of those motivated by the KredEx grant, as well as those who think the opposite way, belonged to the boards of apartment associations. But almost one third of common residents had no opinion on this matter.
- The younger the respondents were, the more often they thought that reconstruction grant would motivate renovation. The residents of wooden buildings and from North-Eastern Estonia, however, considered the grant the smallest motivator.

Is the up to 35 per cent non-refundable reconstruction grant offered by KredEx a sufficient motivator for conducting renovation in your apartment building?



SUMMARY: CAMPAIGN SPOTTING

- The KredEx information campaign called **Conduct renovation as a whole, hit the nail on the head** from March 2011 was, according to the follow-up survey, spotted by one third (34%) of apartment building residents. It mostly reached the residents via newspapers, TV and radio.
- During the campaign, **information leaflet Terve Kodu**, dealing with buildings renovation and issued together with county newspapers, Postimees, and Den Za Dnjom was noticed by 30% of respondents and it created interest in more than a half of them (16%).
- **Comparison of different target groups:**
 - Based on the survey results, the campaign reached the people in apartment association boards more than other apartment building residents.
 - The information campaign called Renovate as a whole, hit the nail on the head mostly struck the eye of younger (aged 30-44) and Estonian-speaking respondents; the leaflet Terve Kodu, on the contrary, was slightly more spotted by respondents over 44 years and Russian-speakers.
 - When comparing different building types, the campaign was mostly spotted in newer, medium-sized (41-80 apartments) and panel buildings.
 - Among other regions, Western Estonia stands out most as the number of campaign spotters there was above average.

SUMMARY: COMPARISON OF PRELIMINARY AND FOLLOW-UP SURVEYS

- Opinions regarding **the need for renovation** for energy saving were the same in both surveys. A very large number of residents understood the need for building renovation to save energy.
- In both survey stages, as **energy saving options**, different activities related to insulation of buildings were mainly mentioned. As a difference, in the follow-up survey, it became evident that general insulation/renovation and energy efficiency were mentioned more than before.
- There were no big changes in responses concerning **current renovation activities**:
 - According to respondents' opinions, energy audits had been completed in less than one third of apartment buildings: based on preliminary survey, in 28% and on follow-up survey in 31% of buildings. In both cases it became evident that apartment association board members and common residents had very different knowledge regarding the performance of energy audit.
 - About the renovation works completed, replacement of stairway door or windows and roof insulation or replacement were mentioned mostly. Results of the two surveys are very similar: in the follow-up survey, only façade and ventilation works were mentioned slightly more than previously.
- Speaking of **renovation works planned for 2011**, differences in results of the two surveys are slightly bigger: in January, 27% of the respondents (in April: 34%) were able to mention some planned renovation works in the building. In both cases, facade and roof works were mentioned most frequently.
- **Awareness of the KredEx financing measures** has increased: during the preliminary survey, 43% of the respondents had heard about at least one measure offered by KredEx, but in the follow-up

Additional information

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