



5 Using focus groups data to finalize the Archetypes

Substantiation of Home Occupant Archetypes with the Use of Generative Techniques: Analysis and Results of Focus Groups.

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ABSTRACT A previous study clustered home occupants into archetypes with a questionnaire. This study uses qualitative methods to strengthen those previously-found archetypes with data pertaining to the participants' home experiences. Focus groups were carried out where generative activities were conducted involving the generation of collages. The first activity dealt with the expression of 'meaning of energy use at home' and the second one with the 'ideal home experience'. Analyses were done with content and thematic analysis. Codes were drawn from the data and were assimilated through an affinity diagram. The diagram produced two categories: building themes and human themes, along with five sub-categories (home, financial, energy, psychological, and behavioural aspects). The outcome shows that each archetype expresses needs and meanings of an ideal home experience and energy use differently from each other. The results provide evidence that generative techniques can be used in energy research. In this case, to validate and substantiate the quantitative archetypes previously produced with a questionnaire. Interpretive knowledge in energy research allows for a better understanding of occupants' differing behavioural patterns in regards to energy use and comfort. It allows customizing interventions to the archetypes' specific needs to decrease energy consumption while maintaining comfort.

KEYWORDS energy use, home, profiles, archetypes, generative techniques

5.1 Introduction

To reduce energy consumption, it is necessary not only to understand energy-consuming technologies but also energy-consuming behaviours. Compared to energy efficient technologies, knowledge as to how home occupants consume energy in their residences could be improved (Gaffigan, 2008; Sovacool, 2014). This lack of knowledge of energy behaviours is partly caused by how comfort is understood in the indoor environmental quality field (IEQ) and how comfort-offering technologies are developed (Majcen, Itard, & Visscher, 2013).

IEQ has traditionally been investigated from a technology-driven approach, with a focus on the building, its characteristics, and the physical environment. This process has been done by establishing and following standards and guidelines based on the appropriate amounts (dosages) of stressors to maintain an arguably healthy and comfortable environment for any occupant (Bluyssen, 2009, 2014). Research has shown that comfort is a multidimensional concept not limited to the four individual IEQ factors, but should rather be considered as a psychobehavioral phenomenon instead of limiting it to a perceptual one (Hong, D'Oca, Turner, & Taylor-Lange, 2015; Hong, Taylor-Lange, D'Oca, Yan, & Corgnati, 2016; Ortiz, Kurvers, & Bluyssen, 2017).

On the other hand, building systems, installations, and appliances are researched and developed in such a way that they will satisfy the IEQ standards and guidelines, in an energy efficient manner. Yet, despite the technological developments, energy consumption is not decreasing at the rate it should for the EU 2020 and 2030 targets (Tsemekidi Tzeiranaki et al., 2019). Although factors affecting energy consumption are complex, one that seems to be particularly influential are the occupants' home comfort-making behaviours. Several behaviours at home are exercised to achieve comfort and several of these activities consume electricity or gas (Aune, Ryghaug, & Godbolt, 2011; Ortiz and Bluyssen, 2018; Ortiz, et al., 2017). Consequently, it is important to investigate such behaviours but also the motivations and intentions behind them.

Ortiz and Bluyssen (2018 and 2019) performed a past study that aimed at understanding such motivations. The authors developed a questionnaire to better understand personal differences of comfort-making behaviours and the influence of those behaviours in energy consumption (Ortiz and Bluyssen, 2018).

The present study complements those results with further qualitative data. Specifically, the aim of this study is to find the home occupants' 'interpretive knowledge' regarding comfort and energy use in their homes. The objective of eliciting this type of knowledge is to further complete and improve the previously found archetypes with qualitative data. Particularly with data from their more concealed needs, as opposed to process knowledge data that was elicited in the interviews of the previous study.

Interpretive knowledge is a type of knowledge that is gained in functional contexts and is shaped by the subjectivity of the person experiencing the contexts. In other words, it is the way in which a person interprets experiences and the objects of experiences, through their emotions and intuitions (Bogner, Littig, & Menz, 2009). An effective way of tapping into interpretive knowledge is with the use of generative techniques. Generative techniques are methods in which participants generate artefacts through the aid of visual stimuli. By avoiding initial verbal explanations –such as in interviews– generative techniques allow expressing knowledge that is more difficult to express. Figure 5.1 shows the way in which data from a certain type of knowledge can be gathered.

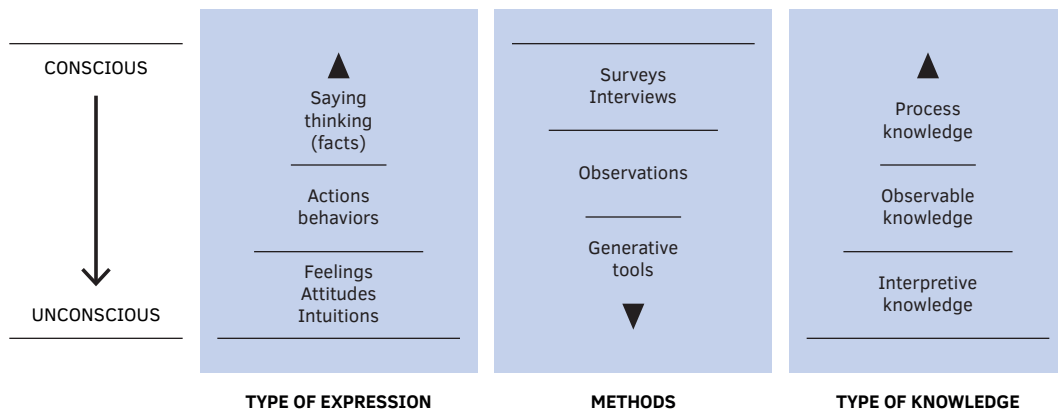


FIG. 5.1 Knowledge levels and respective eliciting methods (adapted from (Bogner et al., 2009; Visser et al., 2005)).

The study performed by Ortiz and Bluysen (2018 and 2019) involved a questionnaire to assess the psychological motivations behind comfort behaviours of home occupants. The variables comprising the questionnaire evaluated the constructs of emotions towards their home environment, locus of control in their home, comfort affordances (home features needed for the occupant to create comfort), and attitudes towards energy. 761 participants responded to the

questionnaire and the data was analysed with the TwoStep cluster method. The method groups respondents into similar responses and produces an output in the form of clusters (Norušis, 2012). Five statistical clusters were determined, which were then substantiated with the data from a field study (Ortiz and Bluysen, 2019). In this field study fifteen of the questionnaire respondents were interviewed, the IEQ parameters of their home were measured, an energy-related building checklist of their home was filled out, and actual energy readings were taken. The results were integrated to those of the clustering analysis to complete the clusters and to create archetypes. The final archetypes that were found in that previous study were named as follows (Table 5.1): Restrained Conventionals, Incautious Realists, Positive Savers, Sensitive Wasters, and Vulnerable Pessimists (Ortiz and Bluysen 2019).

TABLE 5.1 Key archetypal characteristics according to cluster analysis and field study.

| | | | |
|-------------|--------------------------|--------------------|--|
| Archetype 1 | Restrained conventionals | Questionnaire data | <ul style="list-style-type: none"> – Low positive emotions, high negative emotions – High external control, and low internal control – Medium sensitivity |
| | | Field study data | <ul style="list-style-type: none"> – Second highest saver – Positive sentiments of energy, control, comfort, but neutral about affordance needs |
| Archetype 2 | Incautious realists | Questionnaire data | <ul style="list-style-type: none"> – Low positive emotions and highest negative ones. – High external control and lowest internal control – Doesn't care about affordances |
| | | Field study data | <ul style="list-style-type: none"> – Second highest waster – Negative sentiments about comfort, positive about energy, affordances, and control |
| Archetype 3 | Positive savers | Questionnaire data | <ul style="list-style-type: none"> – Second Highest positive emotions and lowest negative emotions. – Lowest external control, and high internal control – Slight affordance indifference |
| | | Field study data | <ul style="list-style-type: none"> – Highest energy saver – Positive sentiments about affordances and comfort, negative about energy and control |
| Archetype 4 | Sensitive wasters | Questionnaire data | <ul style="list-style-type: none"> – Highest positive emotions, second lowest negative emotions – Low external control, and highest internal control – Affordances are very important |
| | | Field study data | <ul style="list-style-type: none"> – Highest waster of all – Negative about energy, ambivalent about affordances, and positive about control and general comfort |
| Archetype 5 | Vulnerable pessimists | Questionnaire data | <ul style="list-style-type: none"> – Lowest positive emotions, high negative emotions. – Highest external control, low internal control – Affordances are not important |
| | | Field study data | <ul style="list-style-type: none"> – Third highest waster – Positive about comfort and control, ambivalent of energy and affordances |

5.2 Materials and Methods

Although several definitions exist for the term ‘focus groups’, depending on each field, in this project, the term focus group will be used for the sessions with projective techniques carried out in this study. The reason for this is because it has sometimes been used an umbrella term for activities where a group of people whose point of view are gathered; in which a moderator has prepared questions and probes to induce participants’ answers; and whose goal is to elicit perceptions, feelings, and attitudes of the participants about the selected topic (Vaugh et al., 1996).

To tap into the interpretive knowledge, focus groups were developed with projective activities. Projective activities are tools drawn from techniques used in clinical psychology (Boddy, 2007). The objective of these techniques is to bypass conscious defences and gather the tacit knowledge; therefore, the participants can provide unchanged views of their feelings and attitudes, which is not possible with more direct questioning. For the creative process, these techniques have been used as they enable researchers to gain information that would otherwise be filtered through the participants’ social desirability bias (Boddy, 2007; Hibbard, 2003).

5.2.1 Participant selection

Participants in this study were selected from the respondents who had taken part in the proof-of-concept study (Ortiz and Bluysen 2018). From October 2016 to October 2017, links to a survey were sent to different types of participants. Respondents volunteered to participate in the focus groups as a follow-up to the questionnaire by providing their email addresses. Seventeen participants consisting of eight women and nine men were contacted and they took part in the focus groups. Generally, they were in their last year of their masters studies and a few were in their bachelors. Ages ranged between 22 and 31 and they resided in Rotterdam, Delft, and The Hague in the Netherlands.

5.2.2 Procedure

As suggested by Visser, Stappers, Van der Lugt, & Sanders (2005), we divided the focus group study into a sequence of three research phases: sensitization, sessions, and analysis. Sensitization is a process that gradually immerses the participants

into the topics of the focus group. According to Visser, et al. (2005) sensitization triggers the participants to start reflecting, cogitating, pondering, and exploring features of their personal experiences in their own environment. In order to achieve this, the sensitizing package that contained a booklet, pencils, markers, stickers with words, and an information sheet explaining the goal and purpose of the research was distributed to the participants one week before their corresponding sessions. The booklet (refer to Appendix E) contained seven short daily activities to ease them into the context: introduction about themselves, word associations with comfort, three-day activity diary, and 'memory-work' writing activity; in which they wrote about their most significant stress-free related memory. The objective of this phase is to let participants start accessing their experiences about topics that they normally do not think about, so that the quality of the data produced during the sessions is wider and deeper.

The sessions took place in the Multisense Lab in the faculty of Industrial Design Engineering of Technical University of Delft from November 2018 to December 2018. The Multisense Lab consists of an observation room and a control room. The observation room is equipped with microphones, cameras, and a one-way mirror (to the control room), which allowed facilitator to record the sessions and take observation notes from the control room (see Figure 5.2).

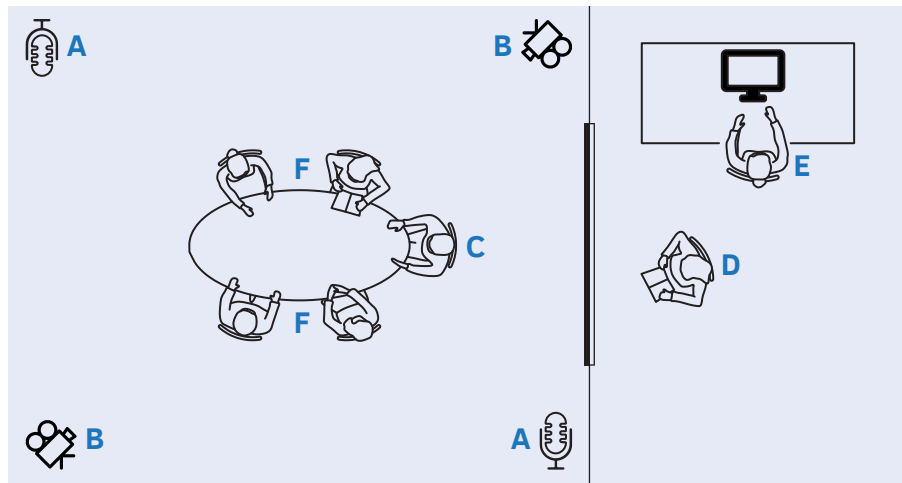


FIG. 5.2 The floor plan of the Multisense lab: observation room and the control room (A: microphones, B: cameras, C: moderator, D: observer in one-sided mirror, E: camera controller, F: participants).

A facilitator with prior experience in focus groups moderated the sessions. Two more researchers were taking notes and controlling the technical aspects of the session from the control room (camera panning, zooming, volume setting, time tracking), which was connected via the one-way mirror. As Table 5.2 shows, each session lasted approximately one hour and half. The duration of each task was checked by a pilot session with researchers from the Chair Indoor Environment. Before the session started, all participants were given a consent form to sign, informing them about the recording of the session and that if they felt uncomfortable, they could cease their participation.

During the sessions, participants were asked to produce two separate collages: (1) 'Meaning of energy use at home' and (2) 'Ideal home Experience'. Collages were chosen as a method that allows participants to express experiences through pictures and words, rather than verbalizing them. The method is particularly effective in eliciting interpretive knowledge (Hanington, 2007; Sanders and William, 2003).

TABLE 5.2 Timetable of the Group session

| Timespan [in minutes] | Activity | Details |
|------------------------------|-------------------------------|--|
| 0 – 5 | Introduction | – Explaining set-up session, goals and emphasizing that they are experts of their own experiences. |
| 5 – 25 (4 per participants) | Warm-up – story/thoughts | – Participants introduce themselves and the booklet story. |
| 25 – 30 | Introduction to collages | – Explanations of what collages are, their purpose. Providing materials. |
| 30 – 50 | Meaning of energy use at home | – Production of collage of the Meaning of Energy Use. |
| 50 – 60 (2 per participants) | Presentation | – Each person explains and presents the artefacts. |
| 60 – 70 | Break | – Snacks and refreshments. – Arranging table and materials for next exercise. |
| 70 – 90 | 'Ideal home Experience' | – Produce collage of an 'ideal home experience.' |
| 90 – 100 | Presentation | – Each person explains the artefacts. |
| 100 – 105 | Wrap-up | – Thank you and final remarks |

Participants were provided with a collection of photos, pictures, newspapers, magazines, journals, and materials for joining and linking (Velcro, glue, staples, tape); colours, markers, glittery tape, coloured and corrugated cardboard, chenille, sticky notes, differently shaped stickers, and felt. The materials were the same or similar for each of the sessions. For each collage activity in the same session, a different package of materials was provided, to not repeat the stimuli. Magazines with indoors or home pictures were avoided to prevent from leading the participants into certain ways of thinking. Participants were given an A3-cardboard canvas on

which to create the collage. The instructions were given as follows: 'Here are various materials and visual stimuli. Try to use them in any way you want to express what it means to you to use energy at home / what the ideal home experience for you is. You have up to 20 minutes. Please do not talk with the other participants during the activity.' If participants requested to have extra time, it was granted. Participants were given maximum freedom, the moderator only stayed in the room during the first and last 3 minutes of the activity; the rest of the time, the moderator observed the participants from the observation room. If participants seemed stuck or had questions, the moderator would return to the session room to clarify.

The study was reviewed and approved by the ethics approval committee of the Technical University of Delft.

5.2.3 Data analysis

After each session, a diverse range of qualitative data was collected: verbal protocol (audio and video) and artefacts (collages). The collages corresponded to stories, tales, and narratives related to comfort at home and the meaning of energy use. As a result, collages and verbal protocol were qualitatively analysed together as: a) verbal protocol and b) artefact analysis in a seven-step process (Figure 5.3).

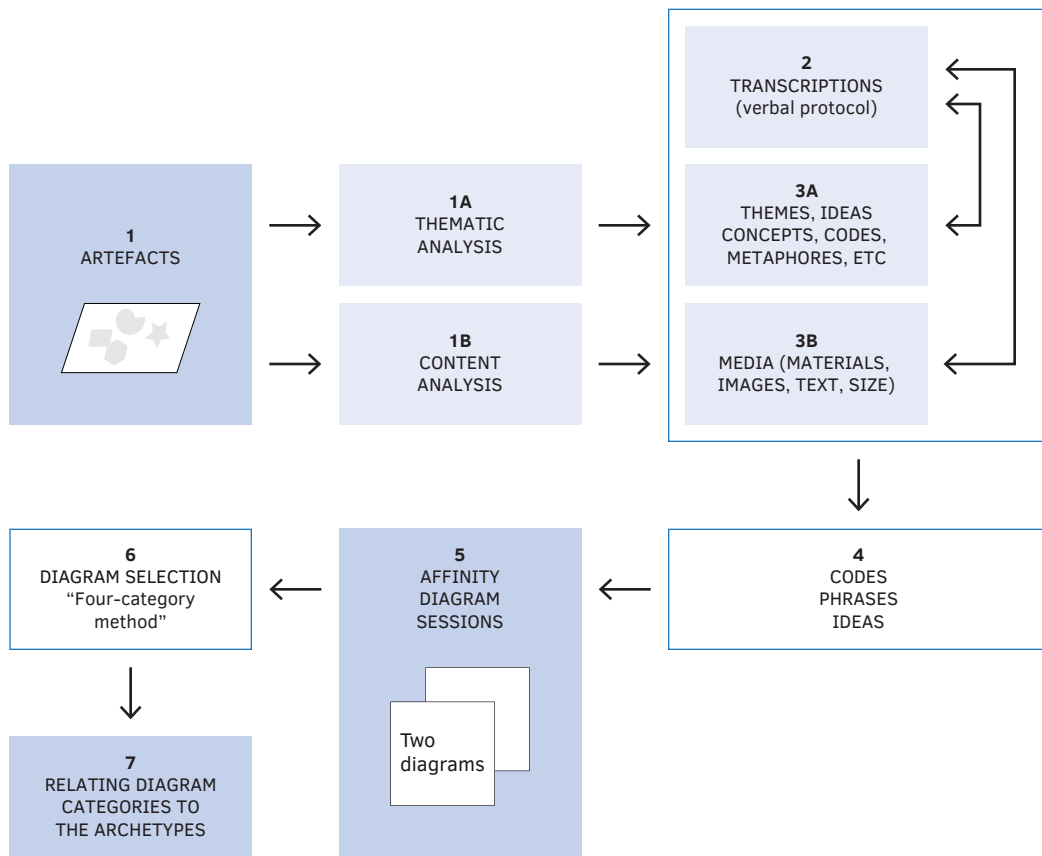


FIG. 5.3 Seven-step analysis process.

5.2.3.1 Transcriptions

First, an investigator produced verbatim transcriptions from the session speeches. This was performed by one researcher playing back the recordings and manually transcribing every word of the transcripts, the timing, and the speaker. Then each collage explanation was analysed according to Polkinghorne and Arnold (2014) by using the recursive abstraction approach (Hershkowitz, Schwarz, & Dreyfus, 2001; Polkinghorne and Arnold, 2014). This technique allows reducing and condensing the verbal data into codes, phrases, and ideas, giving the possibility of identifying patterns within the data that would otherwise not be easy to identify.

5.2.3.2 Content and thematic analysis

The collages were analysed with the content and thematic analysis approaches (Crowe, Inder, & Porter, 2015; Vaismoradi, Turunen, & Bondas, 2013). This was done with two researchers: the main investigator and another researcher, by observing the collage, measuring the pictures, and deliberating in the codes to be used for content and theme.

Both content and thematic approaches are suitable to analyse exploratory data in fields in which information is scarce (Vaismoradi, et al., 2013). The content analysis is a descriptive and quantifying analysis of the artefact, while the thematic analysis takes an interpretive and qualifying angle. The content analysis shows what type of materials, media, and physical visual objects the participant chose to express his or her experiences. The thematic analysis is done in conjunction with the transcriptions, and it allows understanding the symbolic meaning, concepts, feelings, experiences, ideas, stories and themes, that the participant is expressing (E. Sanders and William, 2003; E. B. N. Sanders and Stappers, 2008; Stappers and Sanders, 2003).

To conduct the content analysis, every element of each collage was thoroughly described by dividing the description into four parts as shown in Table 5.3.

TABLE 5.3 Content analysis description

| Content Analysis | Characteristics |
|-----------------------------|---|
| Media used on the collage | Materials, images, written text, shapes |
| Position, Size and Shape. | Size of the objects, position on canvas |
| Description of image | Description of what the object is |
| Category of the description | What type of thing is objectively shown (i.e. nature, humans, food, etc.) |

Subsequently, the thematic analysis was performed in a similar fashion, per object on the collage. The parts extracted in the thematic analysis are shown in Table 5.4. Once the content and thematic analyses were finalized, two pieces of data were used for the subsequent step: the words and phrases under the 'theme or idea represented' and the 'participant explanations'. These were transferred into a spreadsheet, and combined with the codes of the recursive abstraction from the transcripts of the verbal protocol. This spreadsheet was a list of codes, phrases, and ideas, reflecting the participants' experiences, and they were used as tags for the next part of the analysis.

TABLE 5.4 Thematic analysis description

| Thematic Analysis | Characteristics |
|---|---|
| Theme or idea represented | Main theme or idea as the participant explained of the object |
| Processes represented | Processes represented by the object |
| Metaphors or symbols | Whether the object is a symbol for another concept |
| Participant explanations (with transcripts) | Verbatim excerpts of transcripts for each object |

5.2.3.3 Affinity diagrams

As mentioned before, the codes are words drawn from the themes of the thematic analysis. When the codes are produced, they are made into physical tags to create affinity diagrams. An affinity diagram is a tool that allows organizing large numbers of qualitative ideas and data into groups in order to see the natural relations between pieces of data pertaining to two or more topics; in this case, the meaning of using energy at home and the ideal home comfort experience.

Two sessions were required to produce a final diagram with the final categories. The first session involved five researchers unrelated to the research to create the code patterns. The second session involved four researchers, that did not take part in the first session and that were also unrelated to the project. Both sessions were supervised by the main investigator, who guided but did not give inputs. In order to select one of the two diagrams for further inspection, the ‘four-category method’ was used as described by the Interaction Design Foundation (Dam and Siang, 2018). This method requires the two resulting diagrams to be rated based on objectivity and concreteness, to avoid unrealistic or improbable categories. This is done by rating the diagrams categories and sub-categories with a 4-point scale from the least concrete to the most concrete. The diagram of the first session was chosen as it had categories that are more concrete.

Finally, the factors of the affinity diagram were associated to the archetypes to which the participants belonged. This was done by referring the individual pieces of data making up the affinity diagram’s sub-categories back to the contents of each of the artefacts.

Table 5.5 presents an overview of the three research phases in this study, along with their purpose, methods, materials, and other characteristics.

TABLE 5.5 Three research phases in this study.

| | Sensitization | Sessions | Analysis |
|-----------|--|--|--|
| Purpose | Enable participants to access their experiences about topics that they do not normally think about in order to enrich the quality of their data from the sessions. | To obtain participants' interpretive knowledge of 'Meaning of energy use at home' and 'Ideal home experience' | To interpret qualitative data obtained from the recorded audio and from the collages and to link to the five archetypes. |
| Method | Conducting short daily activities for seven days (see Appendix E) | Production of two collages (A3 size) per participant and verbal explanations of their productions (see Appendix F & G) | Transcriptions, Content analysis, Thematic analysis and affinity diagrams |
| Materials | A booklet, pencils, makers, stickers with words and an information sheet | A collection of photos, pictures, newspapers, magazines, journals, and stationaries | |
| Duration | 1 week | Approximately an hour and a half (see Table 5.2 for more details) | |
| Location | No particular location was set (preferably at home) | An observation room of the Multisense Lab at TU Delft (See Figure 5.2) | |
| Timeline | Started 1 week prior to their corresponding sessions | November 2018 to December 2018 | |

5.3 Results

5.3.1 Thematic Analysis

Thematic analysis yielded 74 codes in the 'ideal home experience' topic, while the most common factors amongst all of the archetypes were 'nature', 'social interaction', 'connectedness', 'food', 'safety', 'space', 'furniture' and 'freedom'. For the 'meaning of energy use at home', there were 58 codes for all participants. Tables 5.6 and 5.7 show the ten recurring codes for each archetype for 'the meaning of energy use at home' and 'the ideal home experience', respectively. The tables suggest that archetypes have different mental models regarding the two topics, in terms of what they value higher for such topics. However, it can be seen that there are still collectively shared values and needs, especially in terms of nature, energy, comfort, and control.

TABLE 5.6 Percentage frequency of ten most recurring codes for 'meaning of energy use at home' per archetype.

| Archetype 1 | | Archetype 2 | | Archetype 3 | | Archetype 4 | | Archetype 5 | |
|--------------------------|-----|---------------------|-----|-----------------|------|-------------------|-----|-----------------------|-----|
| Restrained conventionals | | Incautious realists | | Positive savers | | Sensitive wasters | | Vulnerable pessimists | |
| Code | % | Code | % | Code | % | Code | % | Code | % |
| Nature (conserving) | 9.3 | Energy | 9.6 | Lack of control | 17.4 | Energy | 9.5 | Lights | 5.9 |
| Forces of nature | 8.0 | Scale (large) | 5.2 | Lost | 13.0 | Costs | 7.1 | Relaxing | 5.2 |
| energy | 6.7 | Comfort | 4.3 | Control | 13.0 | Controlling | 7.1 | Entertainment | 5.2 |
| Saving planet | 5.3 | Waste | 3.5 | Awareness | 13.0 | Comfort | 7.1 | Energy | 4.4 |
| Water use | 4.0 | Use | 3.5 | Powerlessness | 8.7 | Sustainability | 4.8 | Breeze | 4.4 |
| Time | 4.0 | Future | 3.5 | Chaos | 8.7 | Discomfort | 4.8 | Wasting | 3.7 |
| Feeling | 4.0 | Worry | 2.6 | Watching | 4.3 | Wrong | 4.8 | Nature | 3.0 |
| Environment | 4.0 | Nature | 2.6 | Taking care | 4.3 | Warming | 2.4 | Water | 2.2 |
| Battle | 4.0 | Electricity | 2.6 | Caring | 4.3 | Turn | 2.4 | Using | 2.2 |
| Watched (being) | 2.7 | Vision | 1.7 | Action | 4.3 | Quick pleasure | 2.4 | Night | 2.2 |

TABLE 5.7 Percentage frequency of ten most recurring codes for 'meaning of energy use at home' per archetype.

| Archetype 1 | | Archetype 2 | | Archetype 3 | | Archetype 4 | | Archetype 5 | |
|--------------------------|------|---------------------|-----|-----------------|-----|-------------------|-----|-----------------------|-----|
| Restrained conventionals | | Incautious realists | | Positive savers | | Sensitive wasters | | Vulnerable pessimists | |
| Code | % | Code | % | Code | % | Code | % | Code | % |
| nature | 10.8 | nature | 8.2 | view | 9.7 | privacy | 7.7 | nature | 8.4 |
| Rest | 6.2 | freedom | 4.9 | minimalism | 9.7 | spacious | 5.8 | connectedness | 5.0 |
| food | 6.2 | space | 4.1 | urban | 6.5 | furniture | 5.8 | love | 3.4 |
| cosy | 6.2 | social | 4.1 | sharpness | 6.5 | artistic | 5.8 | colours | 3.4 |
| aesthetics | 6.2 | interaction | 4.1 | investment | 6.5 | woriless | 3.8 | automation | 3.4 |
| interaction | 4.6 | small | 3.3 | industrial | 6.5 | Travel potential | 3.8 | Social interactions | 2.5 |
| furniture | 4.6 | food | 3.3 | Connectedness | 6.5 | sustainable | 3.8 | pets | 2.5 |
| entertainment | 4.6 | closeness | 3.3 | central | 6.5 | Stress-free | 3.8 | Water natural | 1.7 |
| connectedness | 4.6 | water | 2.5 | artistic | 6.5 | safety | 3.8 | sustainable | 1.7 |
| social | 3.1 | safety | 2.5 | vegetables | 3.2 | relax | 3.8 | stargazing | 1.7 |

5.3.2 Affinity diagram categories

The affinity diagram (Figure 5.4) produced two categories: the occupant-related category (divided into behavioural sub-categories and psychological sub-categories) and the building-related category (sub-divided into home sub-categories, financial aspects, and energy sub-categories). In total there are 24 factors making up the sub-categories. One 'uncategorized' factor was also included with codes that did not belong to any of the sub-categories.

Charts were produced for the two topics of the collages. Figure 5.5 shows how frequently a code belongs to an archetype for the 'Meaning of energy use at home' and Figure 5.6 shows it for the 'Ideal home experience'. They show the percentages that a code, phrase, or idea is mentioned by an archetype: the frequency (percentage) is interpreted as the meaningfulness or the need of the theme for the specific archetype.

Figure 5.5 shows when using energy at home, archetype 1 expressed experiences mainly related to the factors personal space, neutral energy concepts, and having positive emotions in their homes. Archetype 2's main concerns are related to factors of aesthetics, location, and feeling safe. The highlights of the experience of archetype 3 in regards of energy use concern factors of cleanliness, maintaining control, and doing activities in the home. Archetype 4's meaningfulness lies in experiences regarding factors of control, using the lights, and a concern for wasting energy. Finally, Archetype 5 expressed mainly ideas concerning factors of social interaction, lifestyle principles, and the use of lights as highlights when using energy.

For the 'Ideal Home Experience' (Figure 5.6), the factors of home aspects are important for Archetype 2; 3; and 5. Specifically, archetype 5 shows highlights with 'home features and décor', 'aesthetics', 'contact with nature', and 'size and layout'. Archetype 2 finds important 'areas and zones', 'lights', and 'size and layout'. Archetype 3 expressed value in the 'location of the home' and a need for 'outside view'. Archetype 4 values 'softness' and 'outside view' and Archetype 1 values the same ones. Archetypes 3, 2, and 1, regard the financial aspect with an important role in the ideal home experience.

In energy aspects, archetype 5 has technology as an important need for an ideal home experience, as well as having renewable energy sources. Archetype 2 is concerned with the drawbacks of using energy, and Archetype 4 would prefer to have renewable energy sources.

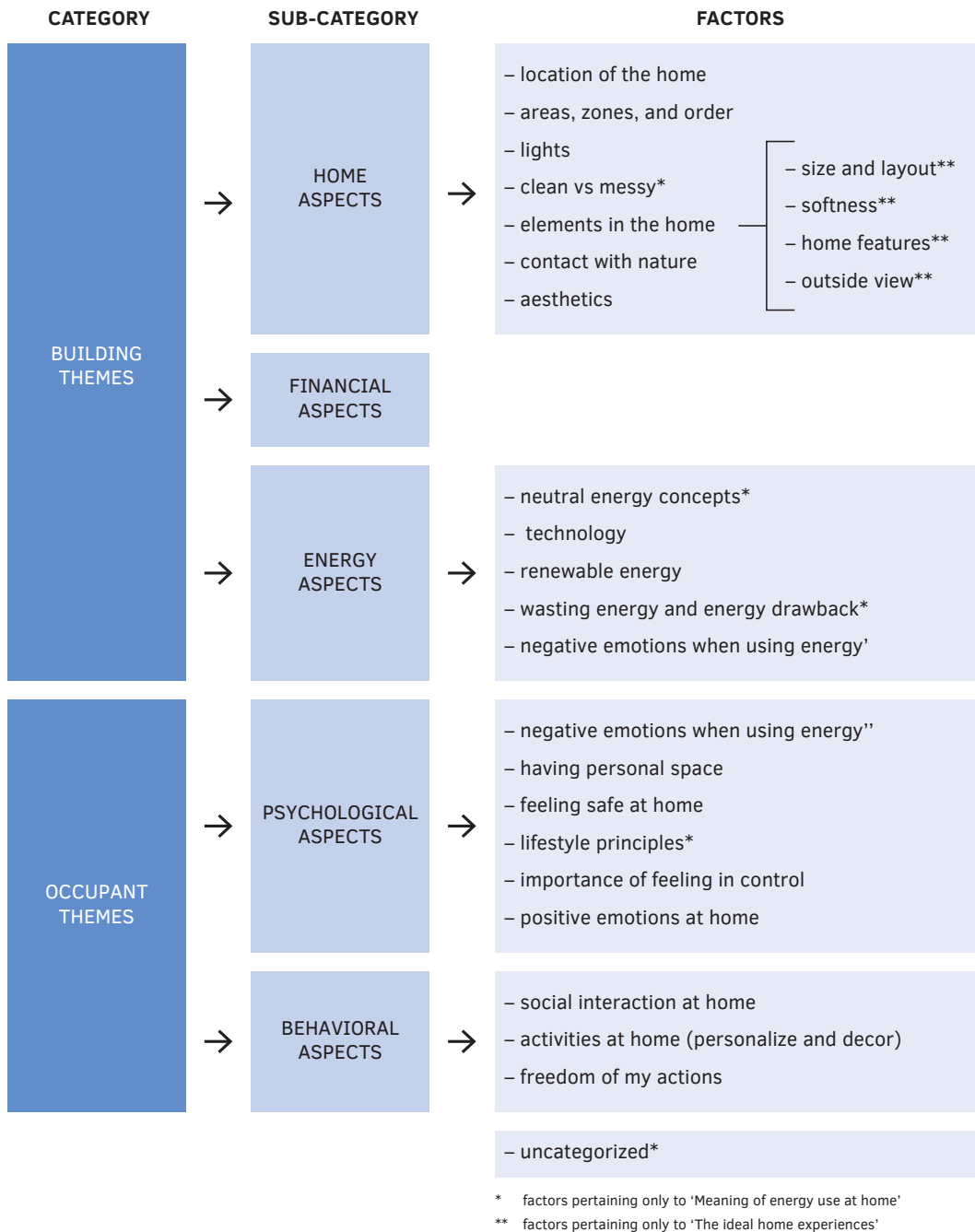


FIG. 5.4 Categories, sub-categories, and factors of affinity diagram.

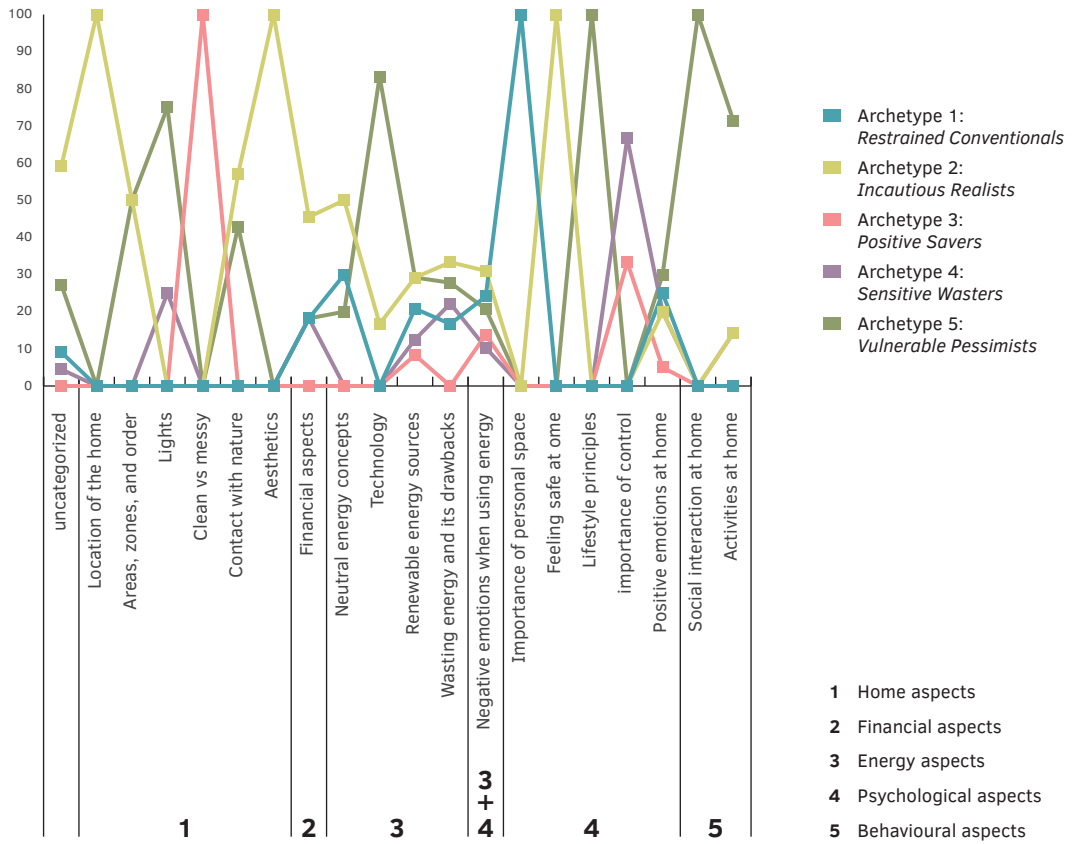


FIG. 5.5 Results 'Meaning of energy use at home'

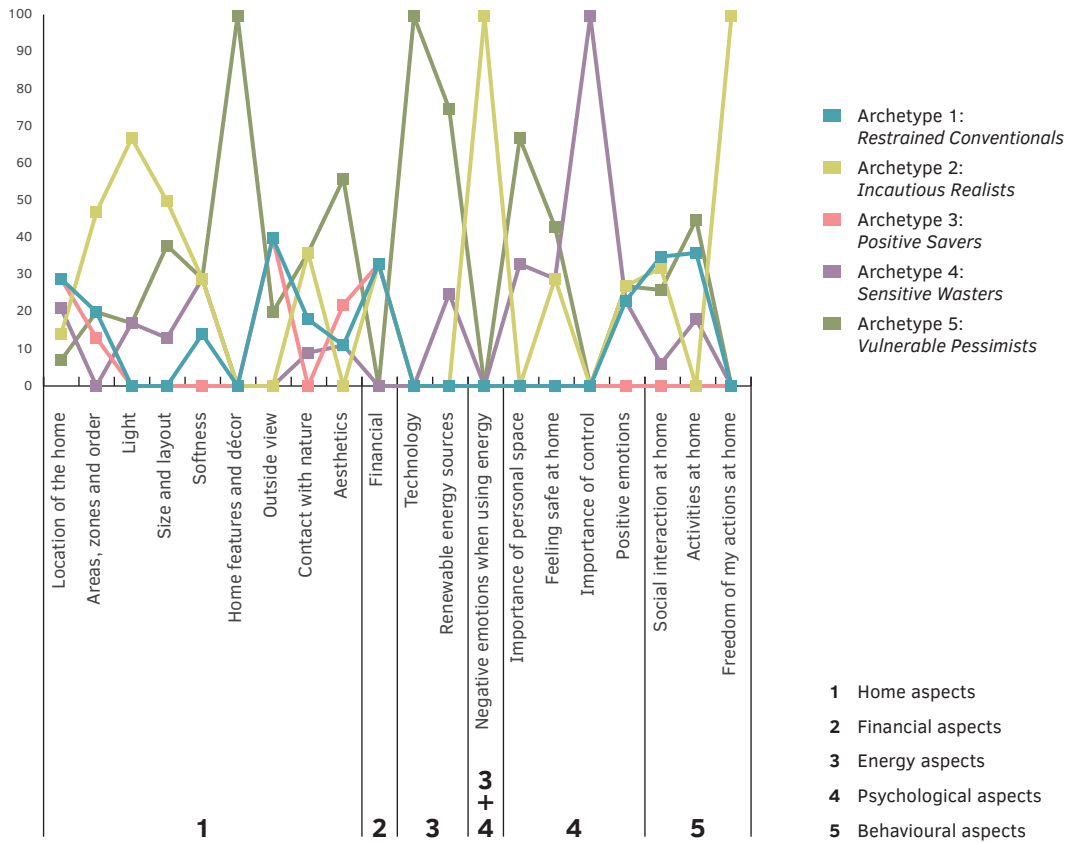


FIG. 5.6 Results 'Ideal Home Experience'

For the psychological aspects, archetype 4 expressed the importance of feeling in control, personal space, and safety. Archetype 2 regards safety highly, and all archetypes want to have positive emotions in their future homes. For the behavioural aspects, Archetype 2 needs freedom of actions, and Archetype 1; 4; and 5, need to be able to do the activities they like, like hobbies.

Supporting figures 5.5 and 5.6, is Table 5.8 presenting for each archetype the main factor of importance for each of the five subcategories (home aspects, financial aspects, energy aspects, psychological aspects, and behavioural aspects) in terms of their combined home experience (using energy and ideal situation).

TABLE 5.8 Number one factor per archetype for the five subcategories

| Subcategory / Archetype | | Home | Financial | Psychological | Behavioural | Energy |
|-------------------------|--------------------------|-----------------------------|----------------|--|----------------------------------|----------------------------------|
| Archetype 1 | Restrained conventionals | Outside view | Medium concern | Importance of personal space | Importance of social interaction | Neutral energy concepts |
| Archetype 2 | Incautious realists | Size and layout | High concern | Feeling safe at home | Freedom of my actions | Neutral energy concepts |
| Archetype 3 | Positive savers | Cleanliness and orderliness | Not concerned | Importance of feeling in control | Activities at home | Renewable energy sources |
| Archetype 4 | Sensitive wasters | Softness | Low concern | Importance of feeling in control | Activities at home | Wasting energy and its drawbacks |
| Archetype 5 | Vulnerable pessimists | Home features and décor | Low concern | Home matching one's lifestyle principles | Activities at home | Using technologies |

5.4 Discussion

5.4.1 Implications and relevance

Generative techniques are a useful method to gain knowledge from users that would otherwise not be possible to elicit through questionnaires or interviews. As is the case with qualitative techniques, large amounts of data are produced, and need to be processed pertinently. The value of analysing the data with the affinity diagram technique is that it allows assimilating large amounts of qualitative data produced in the focus groups and to see new patterns and groups. Some of the connections that appeared are the following: 15 of the 25 factors overlap between the two topics (location of home; areas, zones, order; lights; contact with nature; aesthetics; financial aspects; technology; renewable energy; negative emotions when using energy; importance of personal space; feeling safe at home; importance of control; positive emotions at home; social interactions at home; and activities at home). The factors that only pertain to the meaning of energy use at home are 'neutral energy concepts'; 'wasting energy and energy drawbacks', 'lifestyle principles', 'cleanliness and messiness'. While the factors that only belong to the 'ideal home experiences' are: elements of the home (comprising size and layout, softness, home features, and outside view), and freedom of my actions at home.

Building upon the questionnaire results and the field study results from Ortiz and Bluysen (2019), where text mining from interviews, environmental monitoring, actual energy use readings, and building characteristics checklists were performed, and the results of the generative techniques, the following archetypes are presented:

Restrained Conventionals (archetype 1) are the largest archetype as of the results of the cluster analysis. In this study, they relate the meaning of energy use at home particularly to the drawback of wasting energy and the negative emotions when using energy, and the fact that the use of energy is done at the expense of nature and the environment. In the second collage of the 'ideal home experience', they expressed three main needs for the future: social interaction, contact with nature, and being able to do certain activities at home. In the previous study, they reported higher-than-average positive emotions, high external control, and low internal control; while expressing positive attitudes about energy and sense of control during the interviews, but neutrality about comfort needs. Energy reading averages showed that they are the second largest saver.

Incautious Realists (archetype 2) described their experience mainly with 'neutral energy concepts' and they tend to focus into the future of energy use by observing future possibilities of cleaner energy. For the ideal home experience, their main ideal future need is a home with contact with nature, in which social interaction is possible, and with the right size and layout. In the previous study, the outcomes show that they have high negative emotions about their homes; they score lowest in internal control, and high in external control. Yet, during interviews, they expressed positive attitudes for affordances and psychobehavioral topics of home comfort (using appliances, feeling in control). On average, the energy readings showed that they are the second largest wasters.

Positive Savers (archetype 3) recall mainly the negative emotions about using energy, but also propose that using renewables can bring a more positive experience. Furthermore, for the ideal home experience, they put more emphasis in a need for aesthetics of the home and the location in which it is found. In the questionnaire study, it is shown that they have the second highest ratings for positive emotions and lowest in negative; lowest external control and second highest internal. In interviews, they expressed positive attitudes for affordances, and negative ones about comfort and energy. Energy readings reflect them as the least consuming of all groups.

The Sensitive Wasters' (archetype 4), past experience deals mainly with the drawbacks of wasting energy and with the financial side of using energy. For the ideal home, they have a higher value for feeling positive emotions in general in their future home, which should also be a place where they have their own privacy.

According to the previous study, they have the highest scores in positive emotions and second lowest in negative ones. Similarly, they have the highest internal control and the second lowest external control. In the interviews, they expressed positive opinions about comfort and control of the environment but negative ones on energy awareness. Readings show them as the highest energy consumers of all the archetypes.

Finally, Vulnerable Pessimists (archetype 5) generally express that using technologies in the home is the main experience of energy use and, that such technologies allow for improved standards of living. Their principal needs are to own a home where they have contact with nature and that allows for social interaction. They have, according to the cluster analysis, the lowest scores in positive emotions about the home, and second highest negative emotions. They also present the highest external control and second lowest scores in internal one. Interviewees generally expressed emotional ambivalence in energy awareness, control of environment, and affordances, but positive emotions with general comfort. According to their energy readings, they are the third largest waster.

5.4.2 **Practical significance**

The archetypes can be used in the energy-engineering field for improved and more accurate simulation and building prediction models and outcomes. Furthermore, the occupants pertaining to a certain archetype can be invited to take part in co-creation sessions in the design process of systems, appliances, or interfaces, to design possible custom-made products or environmental features for each archetype. In other words, the specific characteristics of an archetype can be translated into design parameters (interfaces, products) that will support their mental models in a more energy-efficient fashion. This would then enable developing customized products or interfaces that will offer a more personalized comfort while saving energy. For the development of such user-centered products or systems, further analyses are needed such as brainstorming sessions, concept formulation, prototype building, etc. and eventually user-testing and iterative improvements the concepts to arrive to final designs customized for the archetype.

Finally, models pairing archetypes with specific environmental characteristics can prove interesting for architects, contractors, engineers, or housing associations in order to provide the specific archetype with the adequate features that will support efficient behaviours, while maintaining customized comfort.

5.4.3 Strengths and limitations

One limitation of this study is that due to the number of participants, the results should be interpreted as case studies, rather than as representative of each archetype. Another limitation is the fact that all focus group participants were students and with no large age variations: for such a study, it would be ideal to recruit different types of people from each archetype. In general, limitations that can occur in this type of research are the following. Although the technique is powerful and can produce invaluable data that cannot be accessed with any other method, it has also the risk of not producing the depth of data. Instead, shallow data can be obtained. Such a risk exists, particularly if the participants have not been sensitized to the topic beforehand. This can also occur if the participants do not feel at ease during the session and ready to share their emotional experiences with strangers or the moderators.

5.5 Conclusion

This is, to the knowledge of the authors, the first attempt to investigate the energy use at home and its relation to comfort, by using focus groups -and more specifically generative techniques- in a qualitative way.

In the previous study, in which archetypes were developed, a questionnaire assessed constructs related to emotions, control, needs from a psychobehavioral perspective to create statistical clusters. Further, the results of another study -in which some of the archetypes were interviewed- improved those clusters, by eliciting their procedural knowledge -know-how knowledge. Along with this data, building data, IEQ data, and energy data were also collected and were part of the substantiation of the clusters.

This study sheds lights on how generative techniques can be a valuable tool for delving into the interpretive knowledge -the why's- of the behaviours and mental models of home occupants' past experiences and potential future wishes in terms of comfort and energy use. The study also shows how different home occupant archetypes have clearly distinct needs and how they give different meaningfulness to past experiences of using energy in their homes and to what an ideal home experience is. In particular, this data is valuable to complement quantitative data to

strengthen home occupant archetypes. The aim of improving quantitative archetypes with qualitative data regarding energy and comfort, is to ultimately help engineers, architects, and designers to develop technologies that will support the archetypes' behavioural patterns, so that energy consumption reduction can be achieved, while maintaining or improving comfort and health levels.

The results of the present study show that each of the five archetypes has different mental models, different needs in terms of comfort, expectations, and different ways of understanding energy in their own homes. The findings of this study specifically show that for energy aspects, Sensitive wasters (Archetype 4) is concerned about wasting energy, Vulnerable pessimists (Archetype 5) about the technologies surrounding energy, while Incautious realists (Archetypes 2) and Restrained Conventionals (archetype 1) are neutral, and Positive savers (archetype 3) is focused on renewable sources. For behavioural aspects, freedom of action is important for Incautious realists (Archetype 2), while Sensitive wasters (Archetype 4) values social interaction and the rest of the archetypes put importance on the activities carried out at home. Psychological aspects, Vulnerable pessimists (archetype 5) values their lifestyle principles, Sensitive wasters (archetype 4) and Positive savers (archetype 3) having sense of control, Incautious realists (Archetype 2) finds feeling safe important, and Restrained Conventionals (archetype 1) needs personal space. In the home aspects category, Restrained Conventionals (archetype 1) needs view to the outside; Incautious realists (archetype 2) needs right size and layout, Positive savers (archetype 3) about cleanliness, Sensitive wasters (archetype 4) about softness of materials, and Vulnerable pessimists (archetype 5) about décor. Finally, only Restrained Conventionals (archetypes 1) and Incautious realists (archetype 2) find finances important. Understanding this information is a first step to implement lines of action at home or to design interventions tailored to the archetypes understanding of energy and needs of comfort.

Finally, the use of generative techniques, in particular that of collages, seems to have been an appropriate technique; a technique that is normally used in the field of user-centered design, in order to better understand users' mental models. With the data gathered in this study, along the one collected in the previous studies, and with further analyses, it is possible to develop design concepts for each archetype, to offer them products that will satisfy their comfort needs while supporting their specific behavioural patterns.

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