PRESS RELEASE

13 October 2011

"General consumers and the question of energy efficiency"
Rexel reveals the results of the first international survey
conducted by Harris Interactive

EUROPEANS AND AMERICANS ARE READY TO REDUCE THEIR ELECTRICAL CONSUMPTION BUT NEED INFORMATION AND ADVICE FROM EXPERTS

Energy efficiency aims to reduce energy consumption while maintaining the level of service provided, therefore reducing economic, ecological and social costs. Professionals in this field are very familiar with the issue, but how do French, English, German and American citizens perceive energy efficiency? How do they go about saving energy in their households? Are they prepared to make sacrifices and change their habits?
To try to answer these key questions, Rexel, a leading worldwide distributor of electrical supplies called on Harris Interactive to interview a representative sample of the population of these 4 countries[1]: The results of this first investigation show that energy efficiency is at the heart of the public's concerns:

- **Nearly nine out of ten citizens view energy efficiency as an "important" issue.** Consumers consider themselves responsible for electrical efficiency and its promotion, but recognise that they only have a superficial understanding of the existing measures in place to encourage it

- **From small changes in everyday habits to buying eco-friendly fittings, households are committed to the issue.** For example: 80% of French people purchase low energy light bulbs and 72% use multi-sockets with switches (ordinary sockets do not have switches in France).

- **The issue of energy efficiency also appears to be inextricably linked to financial considerations.** Consumers are keen to invest in order to reduce their electricity bills as long as they can measure the impact and see the return on their investment.

- **Distributors of electrical products have an important role to play in the promotion of electrical efficiency** (according to 83% of French people)

By publishing this study, Rexel reaffirms its position at the forefront of the electrical sector, and demonstrates both its expertise in providing energy efficient solutions and its active participation in developing such solutions in partnership with manufacturers, fitters and commercial customers Rexel has also set up an information site, www.electrical-efficiency.com/ in order to promote awareness of electrical efficiency issues.

"This survey shows that we are in the process of moving towards a new energy model. As a market leader, Rexel is particularly involved in accelerating change, helping clients to find eco-efficient solutions and continuing to play a driving role in energy efficiency issues within the electrical sector", says Jean Charles Pauze, Chairman of the Management Board and CEO of Rexel.

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[1] *Survey administered on line between 9 and 19 July 2011. Representative samples of 4,000 people from each of the 4 countries filled in the survey via the Harris Interactive access panel. Representative samples: 1,000 people in France, 1,000 people in Germany, 1,000 people in Great Britain and 1,000 people in the USA. Quotas and readjustments were applied to the following variables: sex, age and profession of the person interviewed.*

Nine out of ten citizens view energy efficiency as an "important" issue but they only have a superficial understanding of the existing measures

Respondents from all four countries are in agreement that the subject of energy efficiency is an important issue: between 86% and 95% of respondents judge the subject to be "important", and nearly two-thirds consider it to be "very important".
However, although citizens are aware of energy efficiency issues and believe they are informed about the measures in place in their country, their knowledge is actually somewhat superficial. In France, four people in five claim to have heard about the "eco Prêt à Taux Zéro" scheme but only 45% know exactly what it is. Similarly, in France, 72% of respondents have heard of the new Low Energy Construction Standard (BBC), but 31% of them don't know exactly what it is.
Respondents outlined their expectations in terms of information that they need to receive: existing financial and legal incentives (for 27% of French and 35% of British), electricity consumption monitoring (23% of French and 28% of Germans) and development of new technologies (for 28% of French and 26% of Germans).

From small everyday habits to dedicated fittings, our households are committed to the issue

Europeans and Americans are very aware of energy efficiency issues and have already made many changes to their everyday habits to save energy. For example: 80% of French people purchase low energy light bulbs and 72% use multi-sockets with switches (ordinary sockets do not have switches in France).
As far as fittings are concerned, 88% of French people prefer to use low energy fittings, 53% would be ready to install movement captors to turn lights off when nobody is in the room (or have already done so) and 42% would consider installing an eco-efficient heating system.

The issue of energy efficiency is inextricably linked to financial considerations

Respondents say they would be willing to make efforts in three areas to improve their energy efficiency: efforts in terms of time (76% in France, 82% in the UK), investment in equipment that is more expensive to buy but with long-term savings (69% in France, 78% in the USA) or giving up certain comforts (71% in the UK, 61% in France, 52% in the USA). Respondents were very aware of their budgets and so tended to be torn between spending less in the short term and making investments that would reduce energy costs in the short and medium term.

Rexel: a market leader committed to promoting efficient electrical solutions

For 83% of French people, distributors of electrical products have an important role to play in the promotion of electrical efficiency. Rexel is committed to promoting electrical efficiency by actively participating in debates and discussing the industry's standpoints but also by training and informing installers via its 2,200 outlets and the www.electrical-efficiency.com website.
Present in 36 countries, the Rexel group advises clients and helps them find the best solutions to manage energy in buildings, optimise lighting and heating efficiency, and install intelligent systems to regulate electricity consumption.

Rexel continues to pursue a strategy which aims to strengthen its service offering through the upgrade of its skills, most notably in the fields of energy audit and consulting for low consumption buildings.

About Rexel
Rexel, a global leader in the distribution of electrical supplies, serves three main end markets: industrial, commercial and residential. The Group operates in 36 countries, with a network of some 2,200 branches, and employs 28,000 people. Rexel's sales were €12.0 billion in 2010. Its majority shareholders are an investor group led by Clayton, Dubilier & Rice, Eurazeo and BAML Capital Partners. Rexel is listed on the Eurolist market of Euronext Paris (compartment A, ticker RXL, ISIN code FR0010451203). It is integrated in the following indices: SBF 120, CAC Mid 100, CAC AllTrade, CAC AllShares, FTSE EuroMid, FTSE4Good and STOXX600.

For more information, visit Rexel's web site at www.rexel.com

If you want to know more about Rexel's environmental responsibility programme: http://www.rexel.com/en/commitments/
To find out more about energy efficiency: http://www.electrical-efficiency.com, Rexel's online magazine for the electrical industry.

About Harris Interactive

Harris Interactive is a leading custom market research company (ranked 6th in the world). The French branch was founded by Nathalie Perrio-Combeaux and Patrick Van Bloeme under the name of Novatris and joined the group in March 2004. Harris Interactive offers innovative study methods and analysis as well as strategic advice that help clients make carefully considered, effective decisions. The group became well known for its Harris Polls and for being a pioneer of online surveys. The company claims to have the largest panel in the world: the Harris Poll Online. Harris Interactive serves customers throughout the world from offices in North America, Europe and Asia. For more information on Harris Interactive, please consult www.harrisinteractive.fr.

MEDIA CONTACTS

Pénélope Linage Cohen
plinage@rexel.com
+33 1 42 85 76 28

DETAILED OBSERVATIONS

International barometer for energy efficiency

Harris Interactive survey conducted on behalf of *Rexel*

Survey conducted online between July 9th and 19th, 2011. 4,000 people total: samples of 1,000 people representative of the population in each of the 4 countries (France, United Kingdom, Germany, United States), based on the Harris Interactive access panel. Quota and adjustments method applied to the following variables: sex, age and occupational status of interviewee.

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Paris - At the request of *Rexel*, Harris Interactive has conducted a survey on the topic of energy efficiency in four western countries: France, the United Kingdom, Germany and the United States. In each of these countries, a representative sample of the population was questioned about opinions and practices relating to energy consumption and the potential ways of optimizing it.

What does this survey tell us?

- **A very large majority of people judge the issue of energy efficiency to be "important" and personally relevant** (more than 85% in all the countries surveyed)**.**

- Citizens identify **very many "good reasons" to encourage energy efficiency,** from the reduction of expenses through to technological advance, while taking in environmental protection and job creation.

- A **large proportion** of the populations in question are **usually aware of the measures introduced in the different countries** to encourage energy efficiency, although this knowledge is **sometimes quite superficial.**

- In all the countries included in the survey, the respondents considered that **citizens, energy producers and distributors, manufacturers of electrical equipment, distributors of electrical supplies and the public authorities all have a role to play in encouraging energy efficiency.**

- **When it comes to performing everyday actions to limit their energy consumption at home, the Germans report being relatively more dedicated than the French or British**, whereas **the Americans seem to be significantly less so**.

- **The issues surrounding energy efficiency seem to be inseparable from the associated financial considerations**: the main obstacles are associated with the cost of the installations whereas the main drivers are linked to the financial incentives available. And what respondents want most is information about the existing financial assistance and the economic efficiency (depreciation timeframe) of their investments.

- In consequence, **the respondents state that they are prepared to make an effort to change their behavior but they are not willing to pay more for their energy.** At the very least, it should be noted that they do not clearly appreciate the distinction between expense and investment.

In detail:

The issue of energy efficiency is judged to be important and personally relevant by the vast majority of respondents

The citizens of all four countries agree that the issue of energy efficiency is extremely important: depending on country, between 86% and 95% of respondents judge this issue to be important, with nearly two thirds considering it to be "very important" (between 60% and 63%), with the exception of France where the issue is accorded less importance (only 47% "very important").

At the same time, **a large majority of the citizens who were surveyed reported paying attention to their energy consumption** (between 87% and 89%), with significantly more British and American respondents claiming to pay "very much attention" to their energy consumption (37% in the United Kingdom and United States compared to 26% in France and 27% in Germany). However, as we shall see, this does not necessarily correspond to their real-life behavior in terms of the adopted practices but rather to their perceived behavior, in particular as a function of each individual's requirements.

According to the inhabitants of the 4 countries, there are very many "good reasons" to encourage energy efficiency

The respondents also identified very many good reasons to encourage energy efficiency, with response levels being broadly similar whatever the country: the desire to reduce expenses was considered to be a "good reason" by 93% to 97% of respondents depending on the country (but only 53% "very good reason" in Germany compared to 66% to 75% in the other countries), ahead of environmental protection (a "good reason" for 91% to 94%), the possibility of using renewable energies (between 90% and 93%), the feeling of responsibility toward future generations (between 89% and 94%), or the guarantee of energy security (86% in France, 91% or 92% in the other countries; and even a "very good reason" for 53% in the United States). The other items identified as good reasons were job creations (84% to 88%; with only 31% "very good reason" in the United Kingdom, compared to 43% to 46% in the other countries), the technological advances generated (85% in France, 91% or 92% in the other countries; with as many as 44% considering it to be a "very good reason" in Germany), and

respect for legislation and standards (82% "good reason" in Germany including 31% "very good reason", compared to 71% to 75% "good reason" in the other countries).

A large proportion of the populations in question are aware of the measures introduced in the different countries to encourage energy efficiency, although this knowledge seems to be quite superficial

More concretely, the respondents were then questioned about their knowledge of the measures undertaken to encourage energy efficiency in their countries.

- **In France, the three measures tested were known by the majority of respondents, even though a majority did not always know exactly what was involved**: 88% of French had heard of the ban on incandescent light bulbs, with 74% understanding what this implies; 79% had heard of the "enhanced interest-free eco-loan", with 45% claiming to know exactly what this represents; finally, 72% of the French had heard of the new low-consumption building standard (French BBC standard), with 41% saying that they knew it in detail.

- **In the United Kingdom, most British report having heard of the measures taken at national level: the ban on incandescent light bulbs** (75%, of whom 54% know exactly what is involved), **and the roll-out of smart meters to all homes by the end of 2018** (65%, including 33% with detailed knowledge). In contrast, the British seem to be less familiar with two other measures: the *Carbon Trust* loans for business (44% have heard of them but only 10% understand exactly what they involve) and the preferential feed-in tariff for energy generated by photovoltaic panels (32%, including 13% with detailed knowledge).
- **In Germany, between two thirds and three quarters of respondents have heard of four measures designed to encourage energy efficiency:** specific measures intended to encourage energy efficiency, such as photovoltaic technology (73% have heard of it, with 42% knowing it in detail), the Energy Pass which is associated with the Directive on the energy performance of buildings (73%, including 42% who know it well), the law on energy efficiency (71%, including 33%) and the reconstruction loan facility (65%, including 38%).

- **In the United States, almost all Americans say that they have heard of the *Energy Star* appliances and purchase rebates** (93%, with 69% reporting detailed knowledge), and the fiscal incentives offered by the federal government for home insulation, heating/air conditioning systems, and *Renewable Energy* equipment (88% have heard of these, with 54% knowing what is involved). Many Americans also say that they have heard of the upcoming ban on incandescent light bulbs (75%, including 46% who know what is involved).

In all the countries included in the survey, the respondents considered that, first and foremost, citizens have a role to play in encouraging energy efficiency, ahead of energy producers and distributors, manufacturers of electrical equipment and the public authorities

In each of the 4 countries, **certain of the stakeholders are unanimously identified as being important for the encouragement of energy efficiency: consumers, i.e. citizens**, are considered "important" by more than nine respondents out of ten (between 91% and 93% depending on the country), while **the producers and distributors of energy** (88% to 93%) and **manufacturers of electrical equipment** (88% to 93%) are also identified as major stakeholders when it comes to encouraging energy efficiency. It should be noted that more than two thirds of Britons go so far as to consider that these latter two stakeholders have a "very important" role to play (66% and 70% respectively, compared to 50-60% in the other countries). Other stakeholders are considered to be important by most respondents: architects/developers (between 87% and 91% "important" depending on the country), corporations (between 85% and 89%), installers/electricians (between 81% and 86%), and distributors of electrical supplies (between 75% and 89%).

Despite this, some major national differences exist. Thus, a large majority of people consider the role of the State to be important in France, the United Kingdom and Germany (88%, 91% and 87% respectively), whereas this is less the case in the United States where the national government (*Federal Government:* 76%, including only 45% "very important") is perceived as slightly less important than the individual state governments (*State*: 78%) – whereas the Germans accord a little more importance to the national government (*Bundesregierung*: 87%) than to the individual state governments (*Land*: 84%). Furthermore, Americans do not accord as high a level of importance to local authorities (71% "important" in the United States compared to 86% to 89% in the

other countries; and only 31% "very important" compared to 54% in the United Kingdom and 47% in France), consumer associations (76%, compared to 81% to 83% in the other countries) NGOs (60%, compared to 67% to 74%) or the United Nations (54%, compared to 62% to 73%). For their part, the Germans represent an exception with regard to the lesser level of importance they attribute to certain stakeholders: specialized (65%, compared to 74% to 83%) or general big box stores (57%, compared to 70% to 79%). As can be seen, while respondents in all countries are united that the consumer has an important role to play at the end of the distribution process, European countries place more emphasis on the importance of the public authorities, whereas the United States tend to stress the responsibilities of private stakeholders a little more.

To limit the amount of energy they consume in their homes, Germans say that they more frequently employ small everyday energy-saving actions, whereas British and Americans seem to think more in terms of large-scale investments in their dwellings

When individuals are asked about the **practices which they adopt in order to reduce electricity consumption in their homes**, **stronger differences can be observed between the countries included in the survey**. Thus, overall, **the Germans report performing far more small actions to help them improve their energy efficiency**: more than two thirds of Germans said that they performed almost all the listed actions. In contrast, **Americans say that they perform these actions less often and are not always prepared to do so in the future. The French and British are located between these two positions**. While more people say they use low-consumption light bulbs in France and the United Kingdom (80% and 81% respectively, compared to 71% in Germany and 69% in the United States), the Germans are the most likely to report filling their washing machines before starting them (79% in Germany and 78% in France, compared to 65% in the United Kingdom and only 52% in the United States), using power strips with a switch (77% in Germany compared to 72% in France and 64% in the United States, and only 31% in the United Kingdom), covering cooking pots so that the water boils faster (83% in Germany, between 61% and 70% in the other countries), switching off appliances rather than setting them to stand-by (70% in Germany and the United Kingdom, 66% in France and only 56% in the United States). While the Americans are those who most frequently report lowering the heating or air-conditioning in their dwellings by a degree (71%, compared to 61% to 69% in the other countries) – an action which undoubtedly relates more to heating than air-conditioning which is very widespread in the United States –, few of them, in contrast, claim to defrost their freezers and refrigerators regularly (33%, compared to 55% to 62% in the other countries) or switch

off stoves and ovens a few minutes before finishing cooking (38%, compared to 43% in the United Kingdom, 48% in France and 71% in Germany).

The inhabitants of all four countries favor two types of investment: **domestic appliances offering low energy consumption** (between 88% and 93% have already invested in this type of equipment) **and the installation of double-pane windows** (71% in Germany, between 83% and 90% in the other countries). It can be noted that the inhabitants of both the United Kingdom and United States say that they are more prepared to invest in their homes than do the inhabitants of the other countries.

However, these results require some interpretation. The inhabitant's intention to make various investments may depend on financial elicitation, level of information, state of the market, housing type... In fact, the structure of the built environment in the relevant countries may have a serious impact. For instance, **the United Kingdom and the United States have a very high proportion of home owners**: approximately 70% in the United States and United Kingdom, compared to only 60% in France and a level of less than 50% in Germany. **The reason why Germans are apparently unwilling to invest in their homes, despite the fact that they head the list in terms of everyday actions to achieve energy efficiency, may partly be due to the limited room for maneuver available to most tenants**.

The issues surrounding energy efficiency is inseparable from the associated financial considerations: the main obstacles are associated with the cost of the installations whereas the main drivers are linked to the financial incentives available and what respondents want most is information about the existing financial assistance and the economic efficiency (depreciation timeframe) of their investments

According to the respondents, the main obstacles stopping them from improving the energy efficiency of their homes are financial in nature: the excessively high cost of "energy efficient" products was cited by between 43% and 54% of respondents in the light of the low level of financial incentives available (45% in the United Kingdom, 42% in France, 30% in Germany and 29% in the United States). While the French (30%) and, to a lesser extent, the Germans (20%) point to a lack of will on the part of the public authorities, this is not the case in the English-speaking countries (8% in the United Kingdom and 5% in the United States) where respondents more

frequently cite the lack of information about products and prices (38% of the British and 33% of Americans, compared to 26% in France and 22% in Germany). Both the French and Germans were also characterized by their belief that there are as yet no truly effective technological solutions (cited by 19% of respondents in France and 26% in Germany). The other obstacles were cited by less than two respondents in ten in all four countries: the difficulty in choosing a service provider (between 6 % and 14% depending on the country), the inability to identify a short-term benefit (between 11% and 13%), not knowing who to talk to (only 7% in Germany, 10% to 15% in the other countries), the feeling of powerlessness at the individual level (between 5% and 10%), habits that have become too difficult to change (17% in Germany but 8% or 9% in the other countries), or fear of a technology that is too complicated (6% or 7%).

At the same time, **the main drivers that might motivate respondents to increase the efficiency of their energy consumption are also financial in nature**: whatever the country, more than three respondents in ten considered financial subsidies in the form of tax credits (from 30% in Germany to 38% in France), the ability to easily measure the savings achieved (from 31% in Germany to 38% in the United Kingdom and United States), or other types of financial incentive (from 33% in France to 36% in the United Kingdom) to be a motivating factor.
In contrast, while the presence of attractive, easy-to-use technologies was cited as one of the main drivers by more than four out of every ten Germans (41%) and three out of every ten respondents in France (30%), this aspect was identified as a major incentive by only 16% of Americans and 18% of Britons. About a quarter of respondents cited financial incentives in the form of interest-free eco-loans (from 20% in France to 26% in the United Kingdom), whereas the other possible drivers were never mentioned by more than one respondent in ten: information campaigns relating to energy-saving habits (from 6% in Germany to 10% in France), a home visit by a specialist advisor (from 7% in Germany to 10% in the United States and the United Kingdom). Finally, the driver that was considered to be the least effective was stricter legislation (from 4% in the United States to 8% in France).

The subjects about which the respondents want to be informed are therefore, first and foremost, the financial incentives and existing legislation (from 23% in the United States to 35% in Germany), ahead of **everyday actions that can be performed** (16% in Germany, but between 24% and 27% in the other countries), **the measurement of electricity consumption** (28% in Germany but between 21% and 24% in the other countries) or even **technological innovation** (from 26% in Germany to 18% in the United Kingdom). Other issues lead to more divergent reactions depending on the surveyed country: while 20% of the French respondents wanted more information on the depreciation timeframe of the equipment, this level ran at only 3% to 6% in the other

countries. With regard to the work that would need to be performed on their homes, the English-speaking respondents (31% of Britons and 32% of Americans) were significantly more interested in obtaining information than the French (16%) or Germans (10%). The respondents reported being less interested in information concerning the diagnostic tests to be performed (between 9% and 14%) or the interpretation of the labels present on household appliances (4% to 8%).

The respondents are prepared to make an effort to change their behavior but they are not willing to pay more for their energy

Finally, **most of the respondents say that they are ready to make three types of changes to their behavior in order to improve their energy efficiency**: first of all, they are prepared **to spend more time** by getting used to the small gestures that contribute to energy efficiency (from 75% in the United States to 82% in the United Kingdom); secondly, they are prepared to **invest money** in equipment which is more expensive at the moment of purchase but which pays for itself in the short or medium term (78% in the United States, between 69% and 72% in the other countries); thirdly, they are willing to **forego certain "conveniences"** – even if the Americans (52%) and, to a lesser extent, the French (61%) say that they are less prepared to do so than the British (71%) or the Germans (70%). **In contrast, less than one third of respondents said that they were prepared to make budget-related efforts and pay more for their energy – which could contribute to the financing of a transition toward renewable energies**: only 18% in France, and 31% to 34% in the other countries. It should be remembered that this survey activity was conducted in a context of considerable economic tension.

The great attention paid by the respondents to their personal finances causes them to waver constantly between the desire to spend less in the short term and their stated wish to invest in equipment that will reduce their energy bills in the medium or long term. The very notion of energy efficiency has not been integrated yet by the population, as many still fear that a change in their energy habits may either cause them discomfort or push their energy bills up. Therefore, the respondents still need to be persuaded that they can use of their energy more efficiently without having to make daily sacrifices.

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Please note that these results must not be communicated without the accompanying technical details such as: the method used for the survey, the dates of conduct, the name of the institute - Harris Interactive-, the sample size.

About Harris Interactive

Harris Interactive is one of the world's leading institutes in the field of market research (ranked 6th in the world in the field of ad-hoc market research). The French organization, founded in 1995 under the name Novatris by Nathalie PERRIO-COMBEAUX and Patrick VAN BLOEME, joined the Group in March 2004.

Harris Interactive provides innovative research methods along with strategic analyses and consulting to give customers the right background knowledge needed to make effective decisions. The Group owes its reputation to the "Harris Poll" opinion polls and its pioneering role in the field of online research methods. The company has set up what it considers to be the largest panel in the world: the Harris Poll Online. Harris Interactive is able to support its customers throughout the world thanks to its offices in North America, Europe and Asia. For more information in Harris Interactive, please visit www.harrisinteractive.fr

Harris Interactive contact details in France:

Laurence Lavernhe - 5-7 rue du Sahel – 75012 Paris - Phone: +33 (0)1 44 87 60 94 – +33 (0)1 44 87 60 30 - llavernhe@harrisinteractive.fr

Jean-Daniel Lévy –Director of the Opinion & Corporate Department - 01 44 87 60 30 – jdlevy@harrisinteractive.fr

harris INTERACTIVE

AHEAD OF WHAT'S NEXT.

General Consumers and Energy Efficiency

REXEL ELECTRICAL SUPPLIES

Report redacted by:
Jean-Daniel Lévy, Head of the Public Opinion Department
Gaspard Lancrey-Javal, Research Executive at the Public Opinion Department
Jamie Bettison, Research Executive at NetObserver

Methodology

- *A quantitative online survey conducted by means of the Harris Interactive access panel among a representative sample of the national 18+ population in each of the 4 countries : France, UK, Germany, USA.* ***4,000 interviews total*** *(1,000 in each country)*

- *Field work conducted between 9-19 July 2011*

- *The representativeness of the samples was ensured using the quota method along with an adjustment of data*

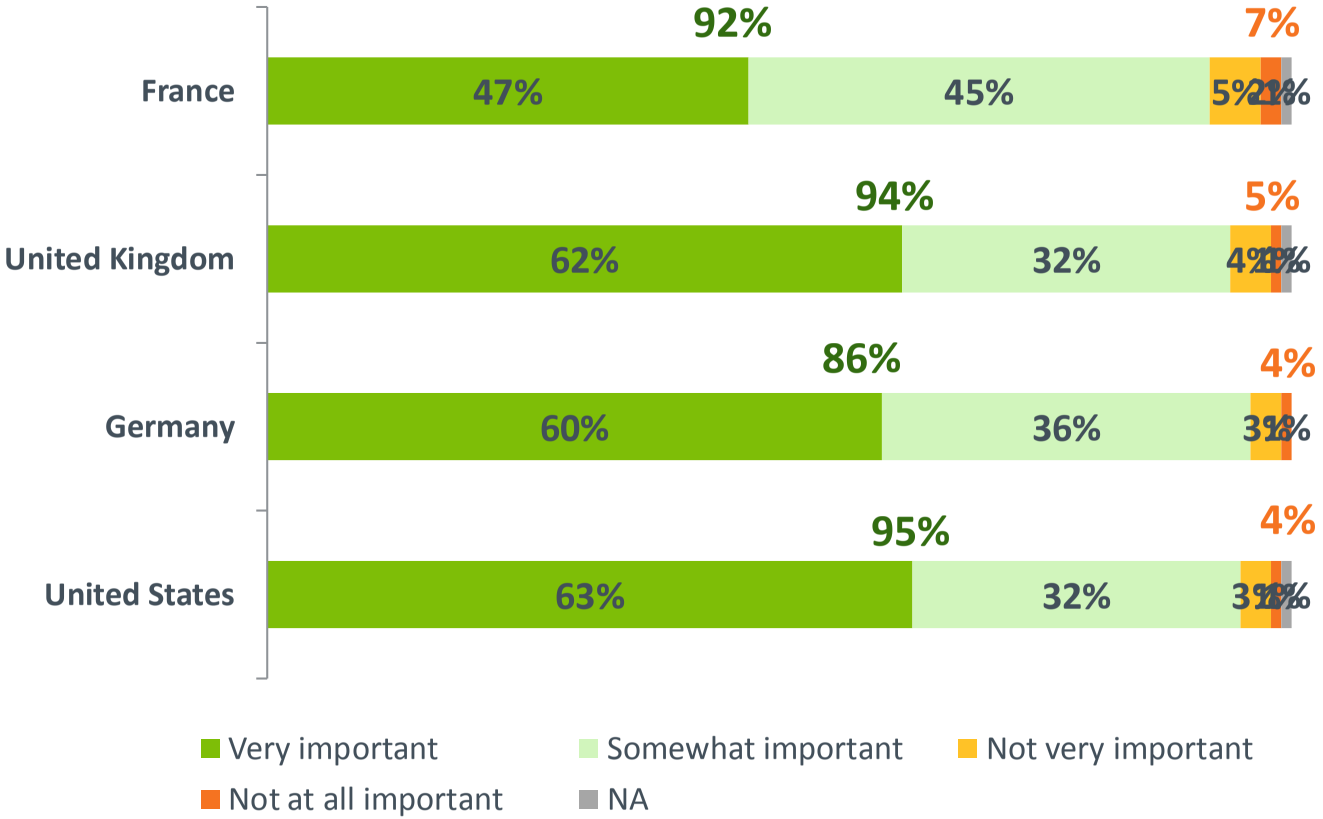
- *Sample :*
  - *After weighting of the data, the sample was representative of the national 18+ population in each country based on the following criteria :*
    - *Sex*
    - *Age*
    - *Level of occupation*

harris INTERACTIVE

Reputation, Definition and Relevance

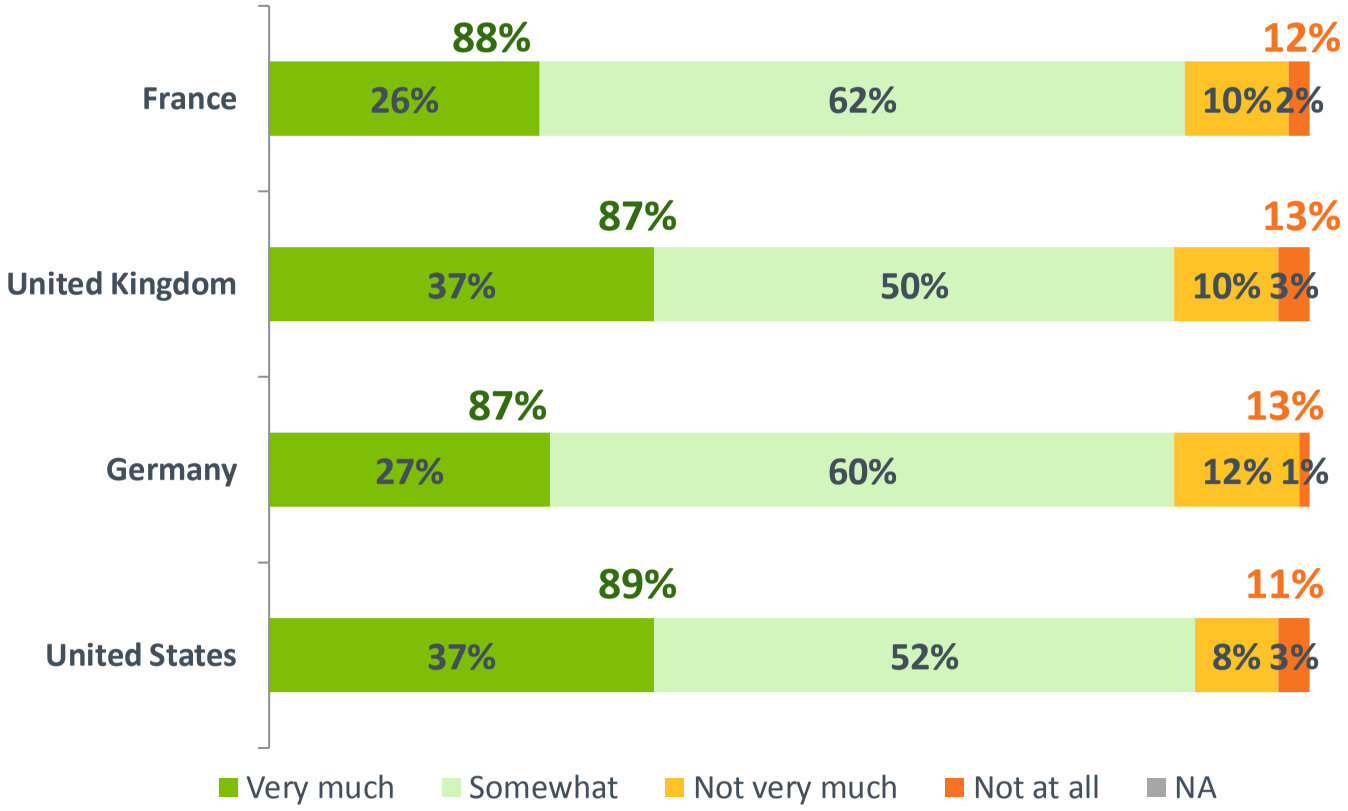
Importance Attributed to Energy Efficiency

The purpose of energy efficiency is to reduce energy consumption without sacrificing service, thereby lowering the environmental, economic and social costs associated with energy generation, distribution and consumption. Would you say the issue of energy efficiency is very important, somewhat important, not very important or not at all important?



Attention Paid to One's Own Energy Consumption

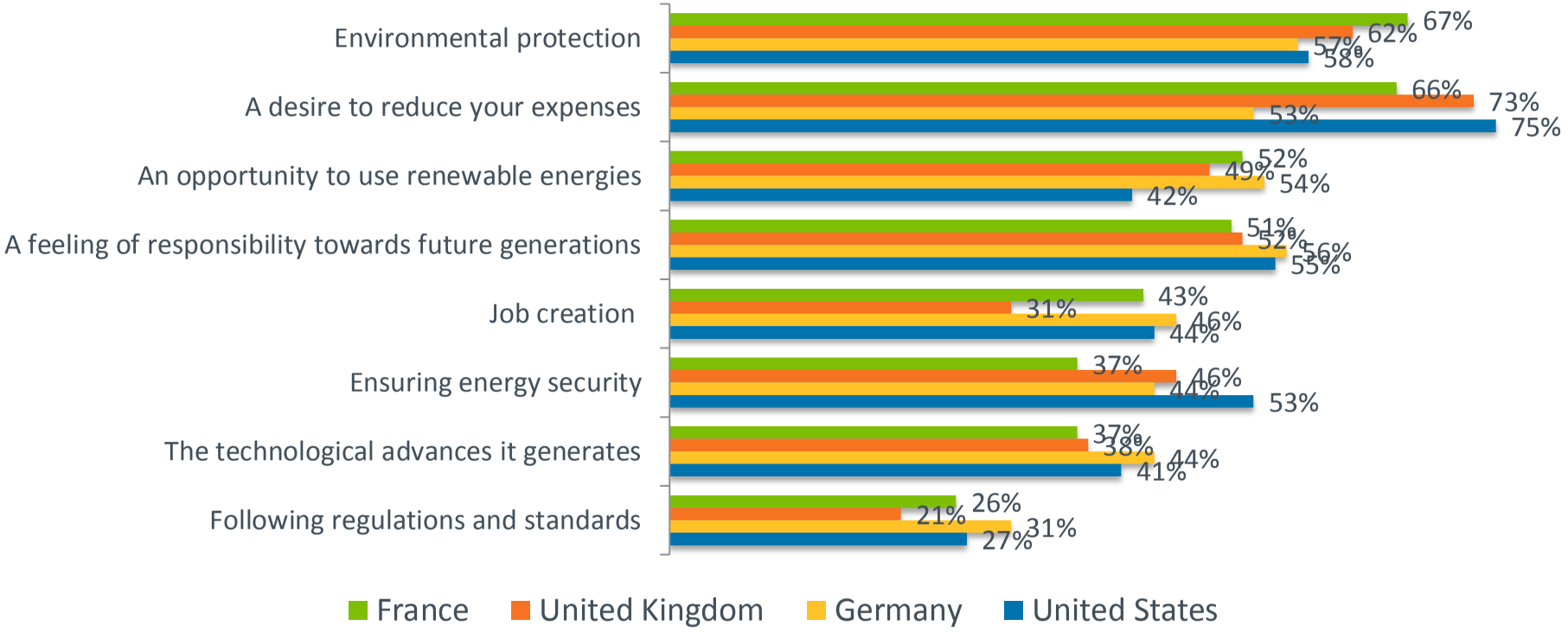
How much do you personally pay attention to your energy consumption: very much, somewhat, not very much or not at all?



Summary Chart: Evaluating Various Reasons to Promote Energy Effiency

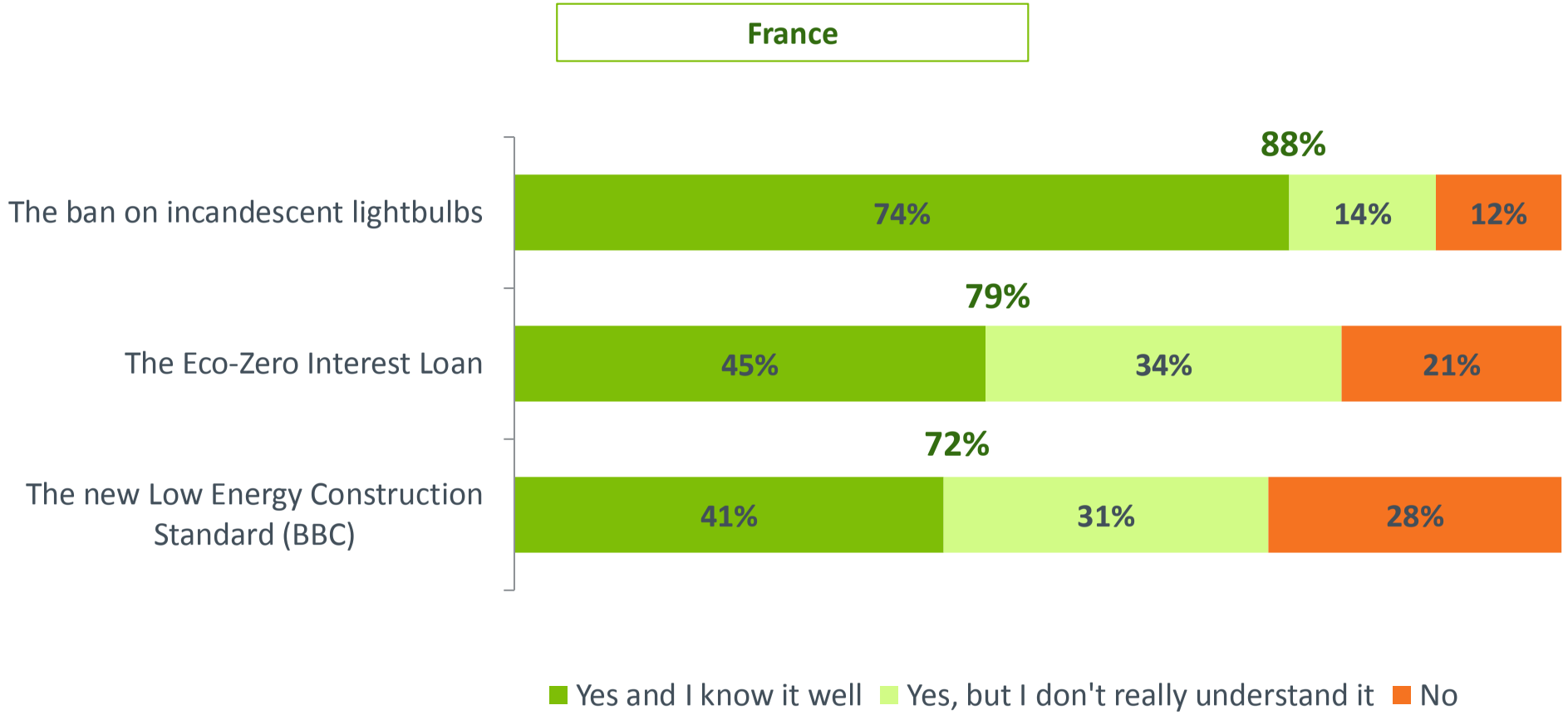
Do you believe the following reasons for encouraging energy efficiency are very good, somewhat good, somewhat bad or very bad?

% Very good reason



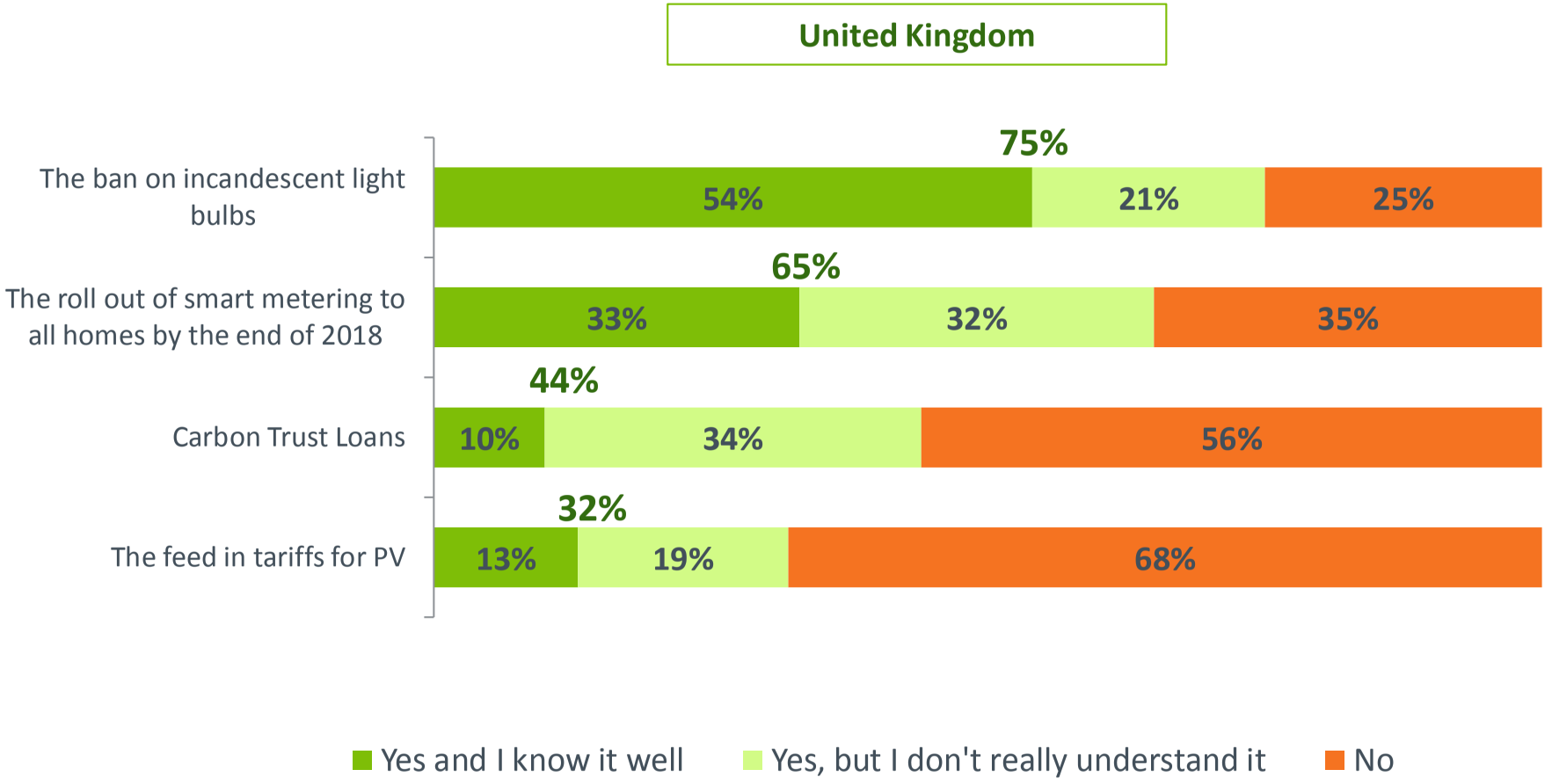
Energy Efficency-Encouraging Measures Recognition in France

Below are some of the measures in your country designed to encourage energy efficiency. Have you heard of them?



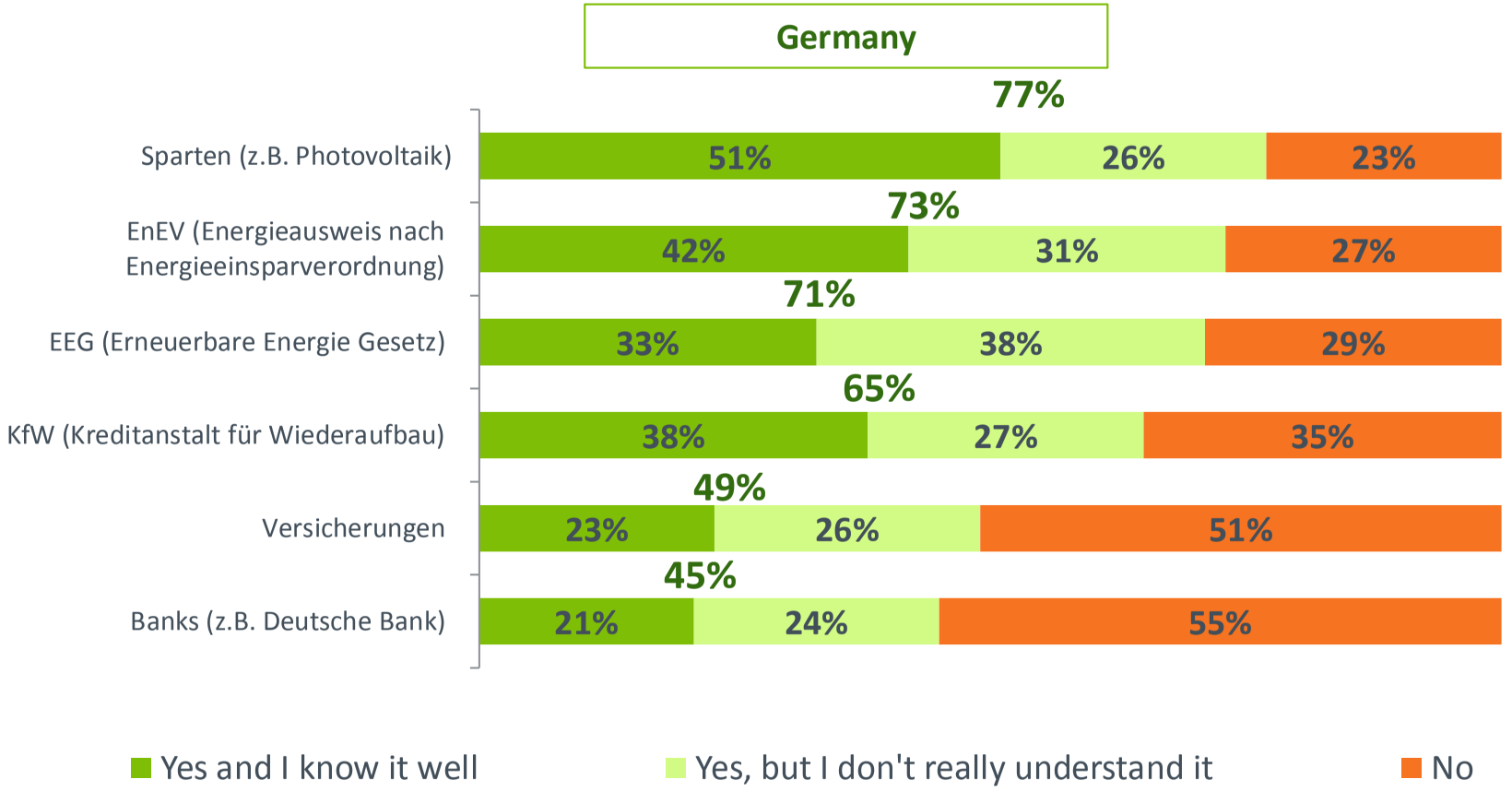
Energy Efficency-Encouraging Measures Recognition in the United Kingdom

Below are some of the measures in your country designed to encourage energy efficiency. Have you heard of them?



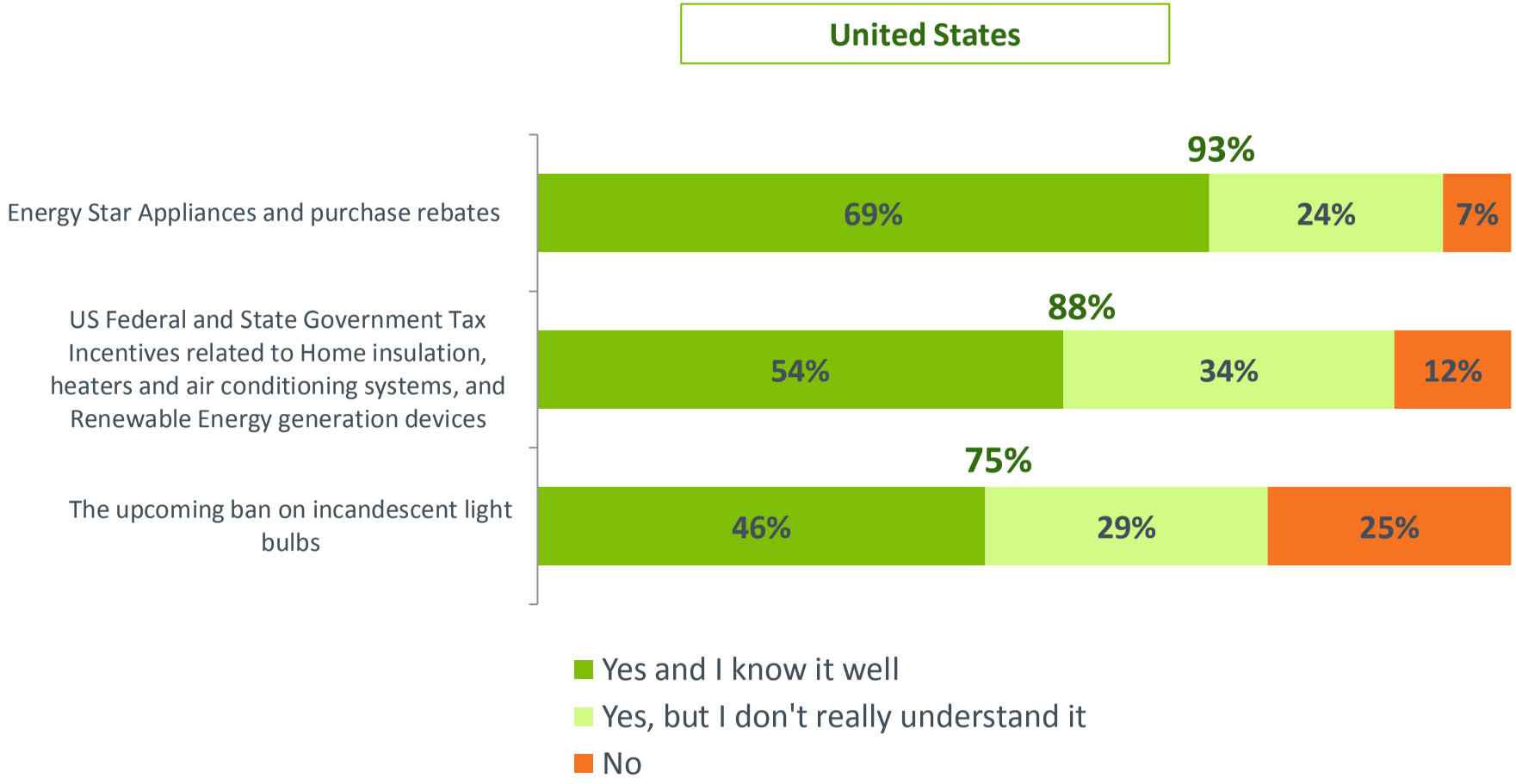
Energy Efficency-Encouraging Measures Recognition in Germany

Below are some of the measures in your country designed to encourage energy efficiency. Have you heard of them?



Energy Efficency-Encouraging Measures Recognition in the United States

Below are some of the measures in your country designed to encourage energy efficiency. Have you heard of them?

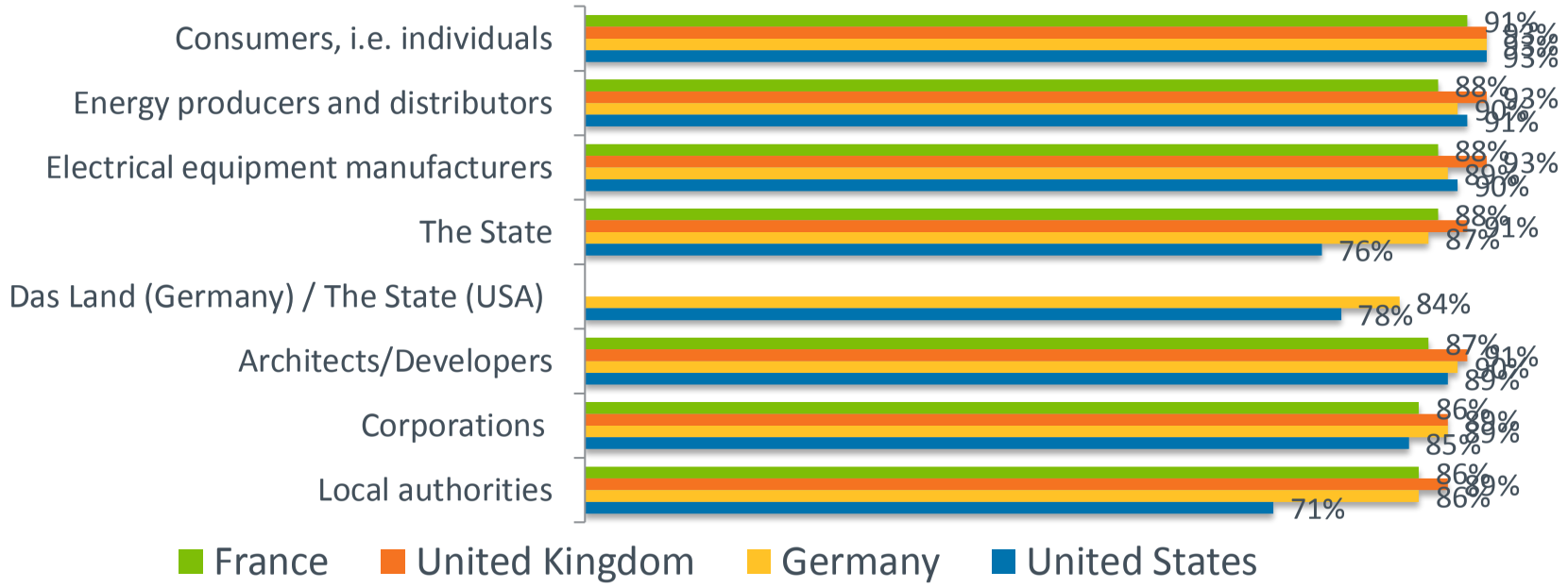


The Stakeholders of Energy Efficiency

The Stakeholders of Energy Efficiency: Summary Chart (1/2)

For each of the stakeholders below, say whether you think they have a very important role to play in encouraging energy efficiency, somewhat important, not very important or not at all important.

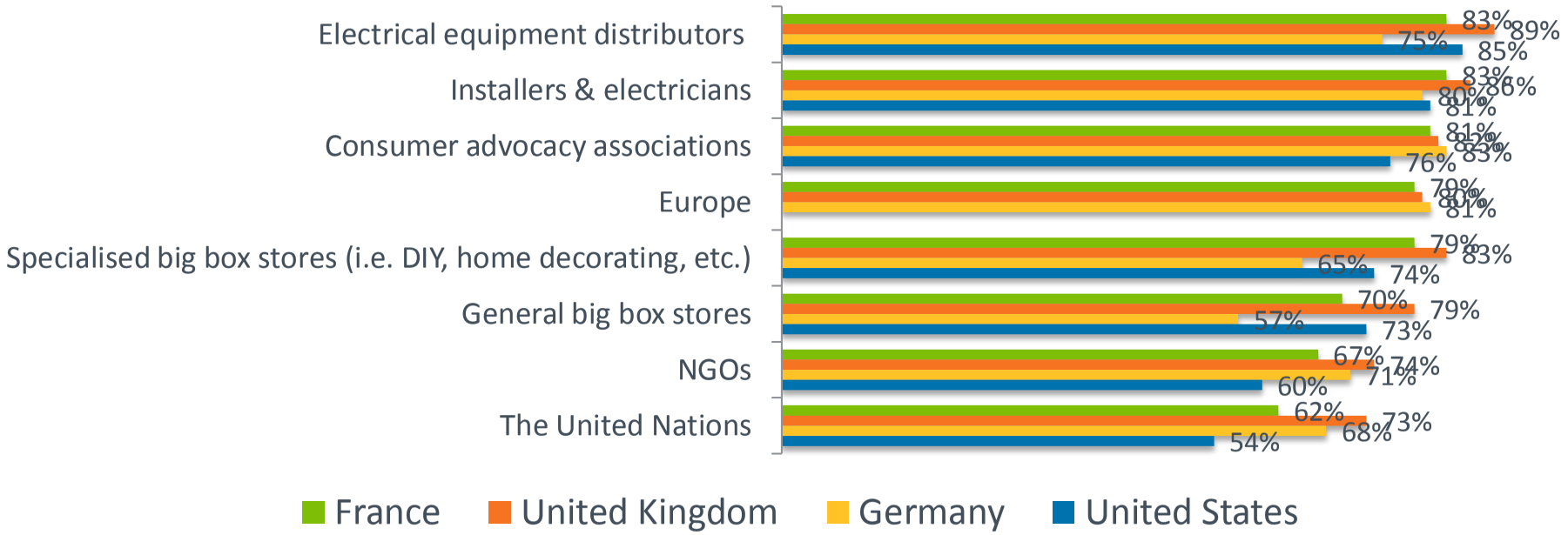
% Important



The Stakeholders of Energy Efficiency: Summary Chart (2/2)

For each of the stakeholders below, say whether you think they have a very important role to play in encouraging energy efficiency, somewhat important, not very important or not at all important.

% Important

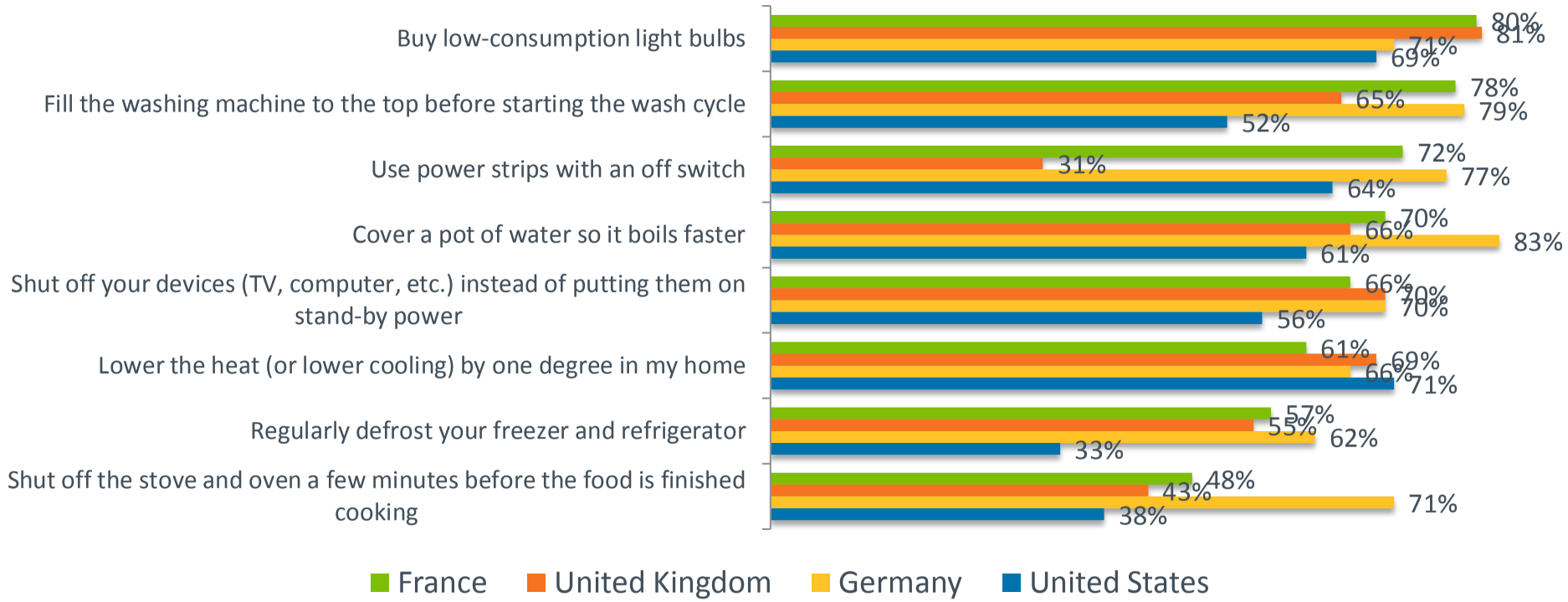


Methods of Encouraging Electrical Efficiency

Summary Chart: Energy Saving Habits

We are now going to talk more specifically about electrical efficiency in your home and all the ways you can use less electricity throughout your day. For each of the following methods, say whether you already do it, would be willing to do it or would not be willing to do it.

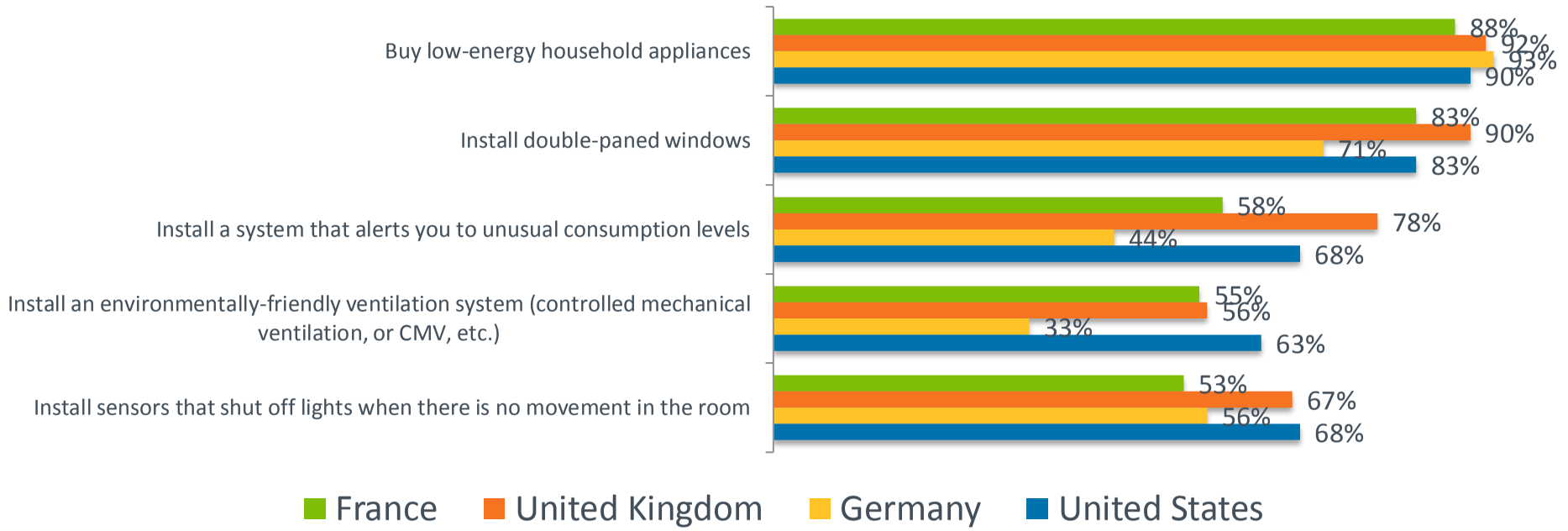
% Already does it



Summary Chart: Energy Saving Investments (1/2)

For each of the following investments, say whether you have already done it, would be willing to do it or would not be willing to do it.

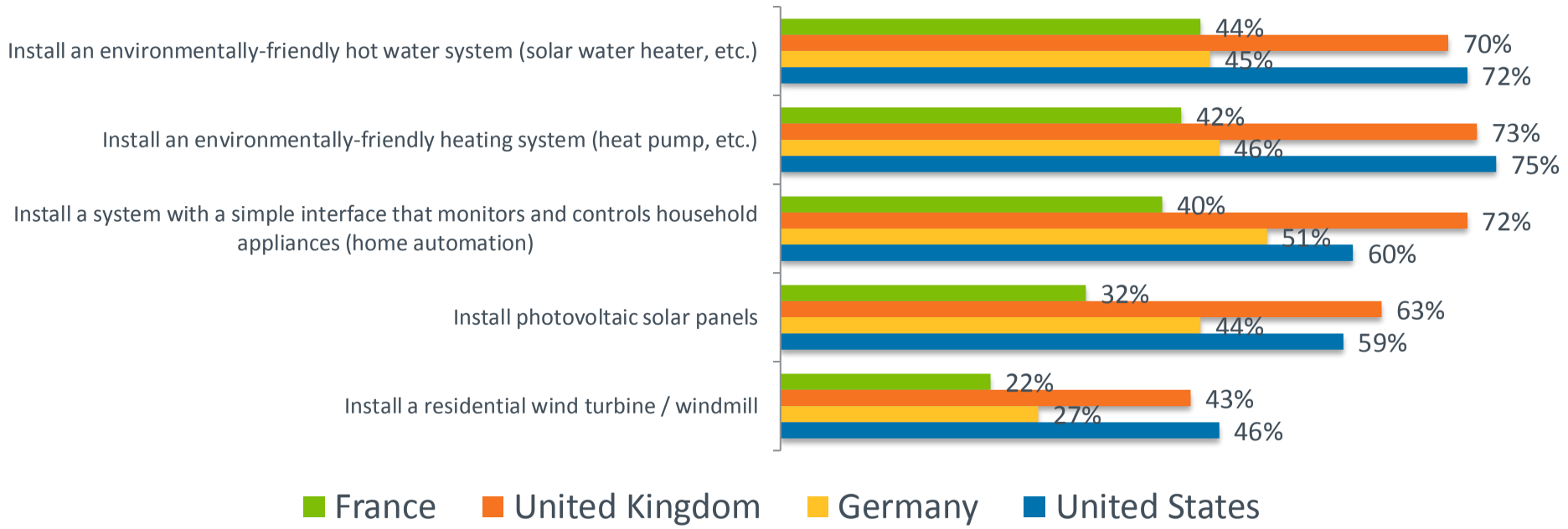
% has already done it / is willing to do it



Summary Chart: Energy Saving Investments (2/2)

For each of the following investments, say whether you have already done it, would be willing to do it or would not be willing to do it.

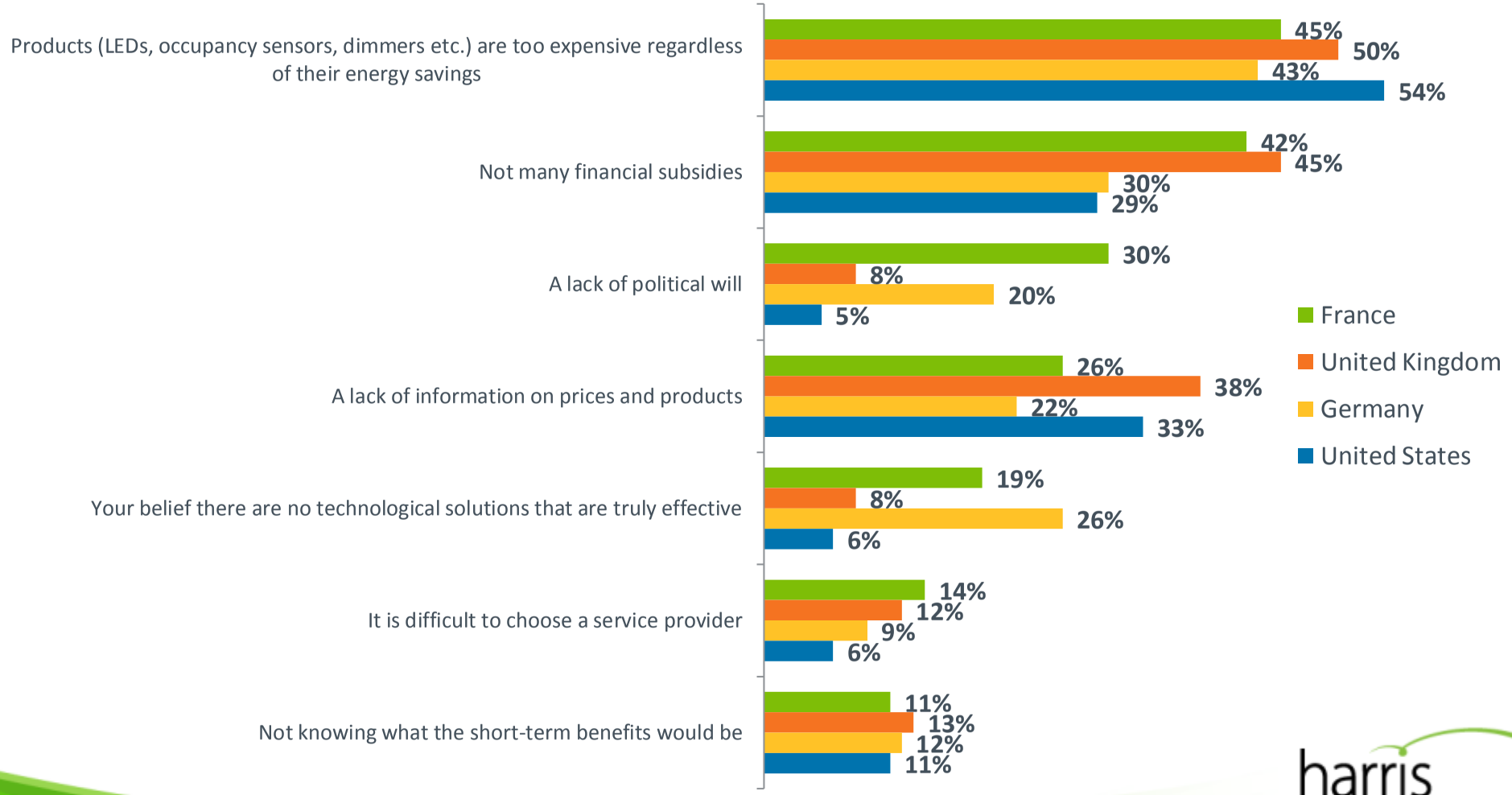
% has already done it / is willing to do it



Obstacles and Drivers

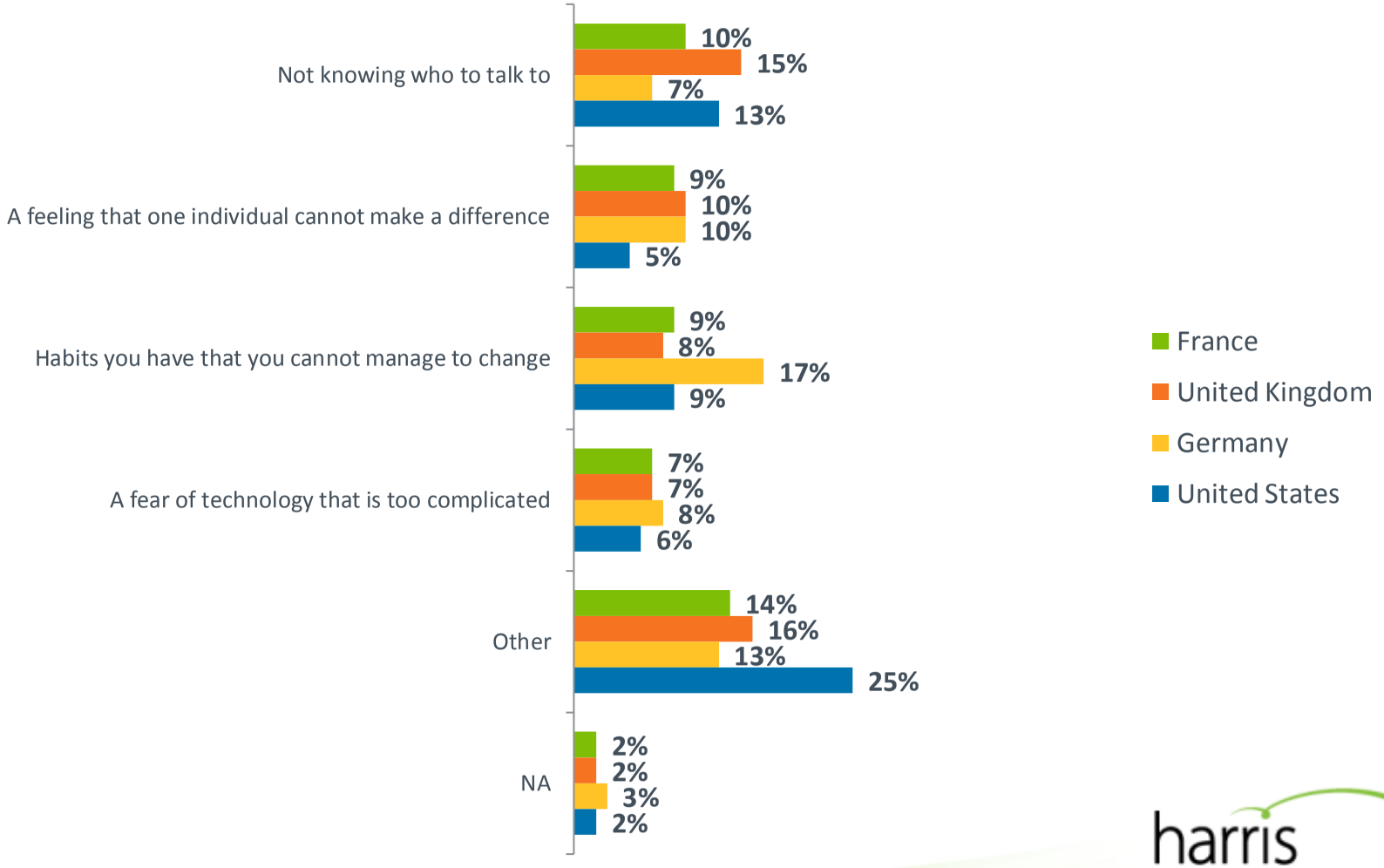
Summary Chart : Obstacles in Saving Energy (1/2)

What are the main obstacles stopping you from saving energy and increasing the efficiency of your energy consumption? (you may choose three answers)



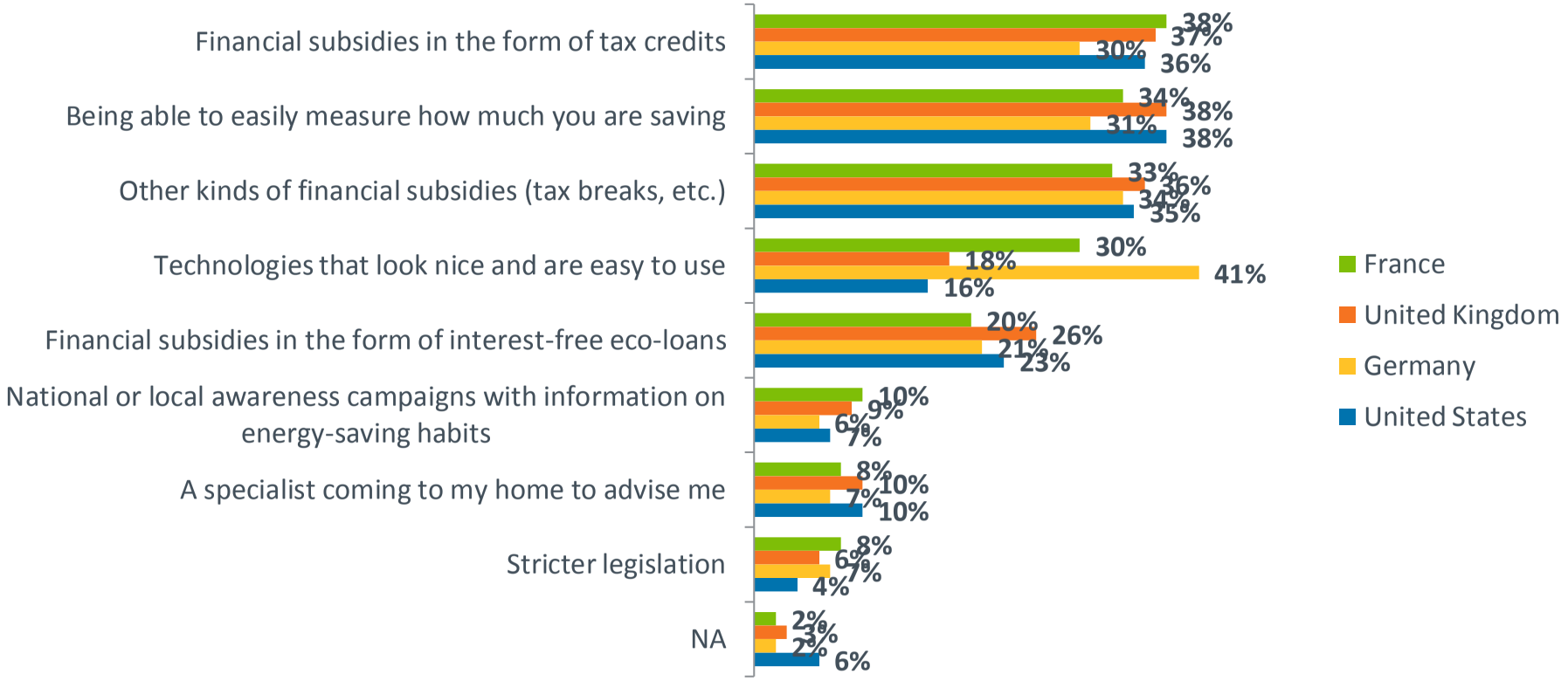
Summary Chart : Obstacles in Saving Energy (2/2)

What are the main obstacles stopping you from saving energy and increasing the efficiency of your energy consumption? (you may choose three answers)



Summary Chart: Motivations for becoming Energy Efficient

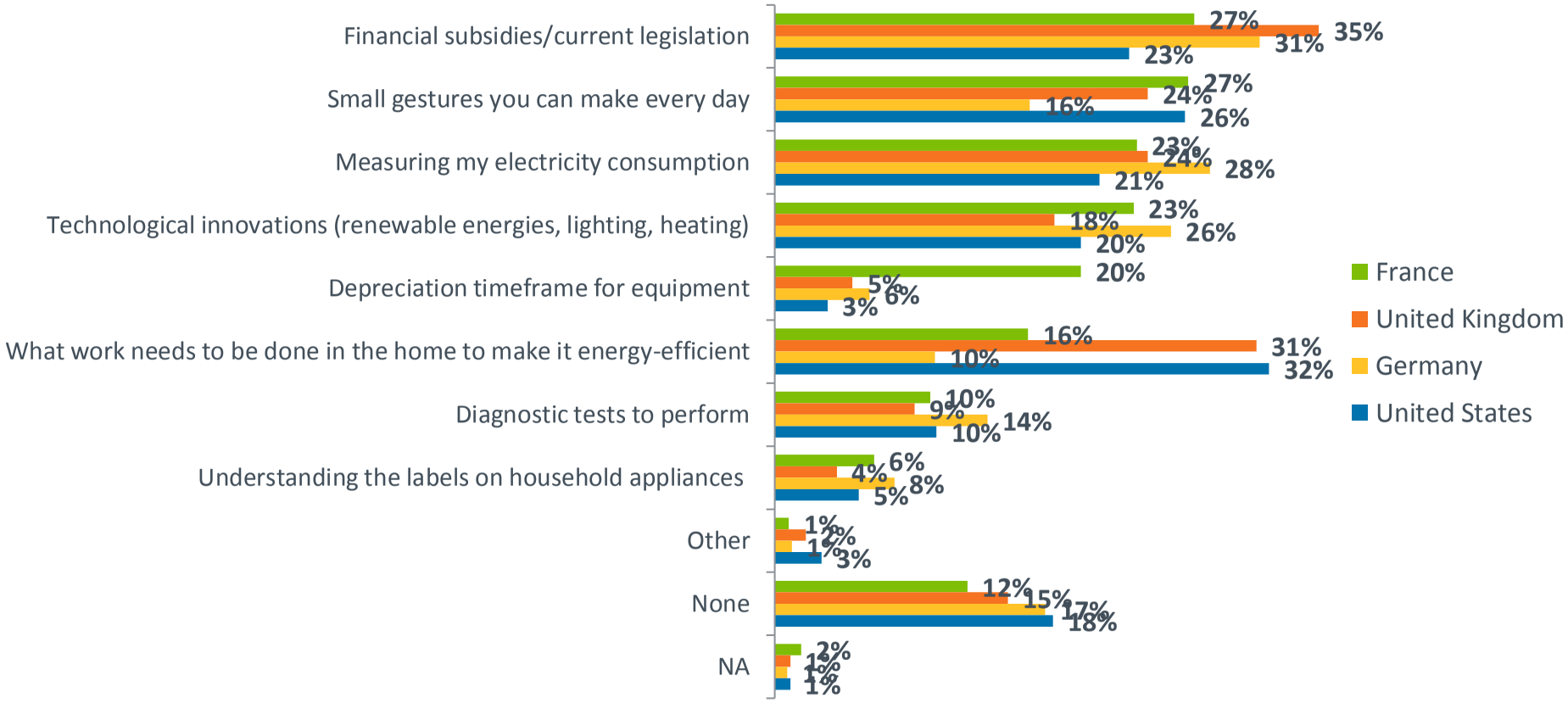
What are the main things that encourage you or would encourage you to save energy and increase the efficiency of your energy consumption? (you may choose two answers)



Expectations

Summary Chart: Most Important Topics to Receive Information about

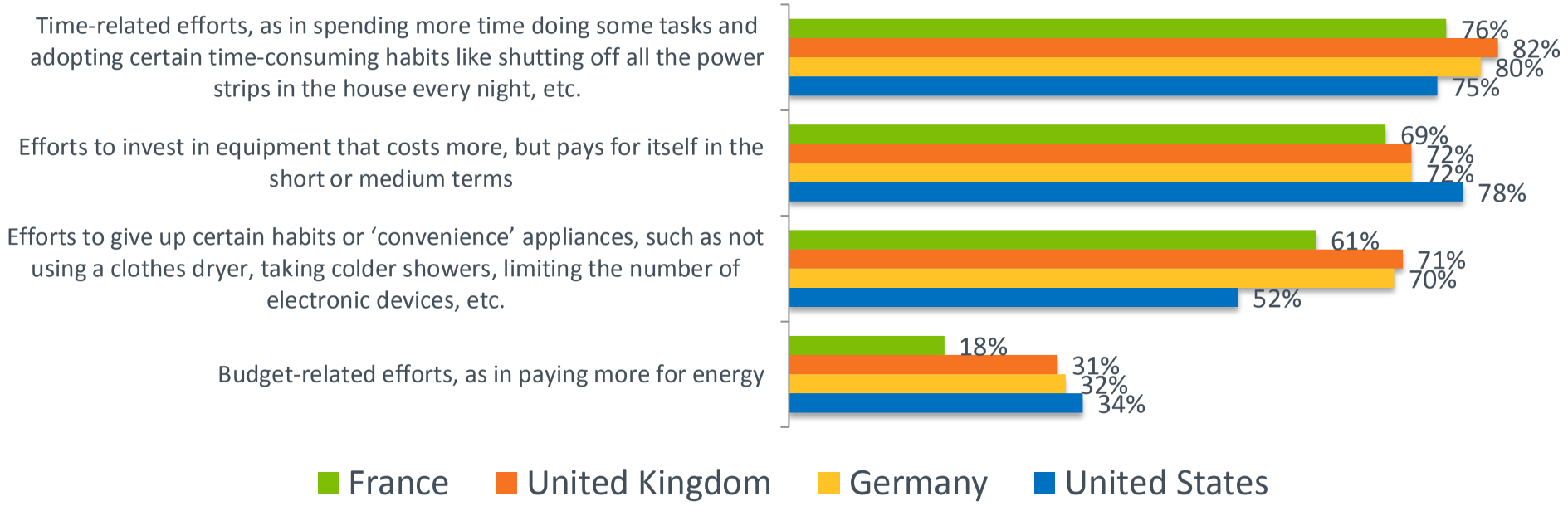
What are the most important topics you would like to receive information about? (you may choose two answers)



Summary Chart : Acceptable Efforts to Save Energy

And would you personally be willing to make any additional efforts to save energy?

% Willing



COMMENTS ABOUT THE SURVEY BY JEAN-MARIE CHEVALIER

PROFESSOR, UNIVERSITY OF PARIS-DAUPHINE, CENTER FOR ENERGY AND RAW MATERIALS GEOPOLITICS (CGEMP)

Improving energy efficiency is a major strategic priority for any energy policy. A Rexel-commissioned survey addressing this issue was conducted by Harris Interactive in July 2011. The survey compares citizen-consumers' perceptions of energy efficiency in four countries: France, the United Kingdom, Germany and the United States. A number of important conclusions could be useful to governments and political parties for developing their energy policy and also to industry companies for revising their strategic priorities.

1- Households are aware of the importance of energy efficiency

Between 86% and 92% of German, American, British and French respondents assign importance to energy efficiency. Between 87% and 89% state they are careful about how much energy they use, citing lower consumption, and thus cost-cutting, as their primary reason.
This awareness reflects a good analysis of the situation. Over the medium and long term, energy prices are likely to rise. Various pressures are affecting the supply/demand balance for oil, gas and electricity, including emerging countries' frenzied demand for oil and electricity products, delayed investments and difficult discussions about the contribution of nuclear power. Moreover, the acceleration in global warming has become increasingly alarming and should serve as an incentive to improve energy efficiency, develop less carbon-intensive energy sources and reduce emissions. In this environment, there are two ways to adapt: energy efficiency (energy savings) and the diversification of energy sources.

2- The survey confirms that French citizens have been changing their energy efficiency behaviors in recent years

Since 2008, with the rise in fuel prices and the introduction of the "bonus-malus system"[1] for cars, individuals have been using less gasoline. According to June 2011 figures published by the Comité Professionnel du Pétrole (CPDP), fuel deliveries to the French market declined by 3.1% compared to June 2010. This likely indicates a permanent change in behaviors.
Along the same lines, the survey commissioned by Rexel emphasizes that 91% of French respondents believe it is up to the consumer to save energy – more so than the government or manufacturers. This is an interesting indication of French citizens' sense of responsibility toward this issue.

3- Of the four nationalities surveyed, the French seem slightly less active on the energy efficiency front, with only 47% assigning it major importance compared to 60% of Germans, Americans and Britons.

[1] A French system in which the car buyer pays a surcharge or additional tax (malus) if the car emits too much CO_2 but may receive a rebate from the government (bonus) if emissions fall below a certain amount.

This attitude may reflect the French energy model, based on nuclear energy and electricity that is generally less expensive. Involvement will likely increase in coming years, and political leaders should probably take steps to raise awareness at a faster pace.
First, electricity rates, politically frozen, prevent the French consumer from becoming aware of the need to increase electricity prices in the near future. Electricity is artificially cheaper in France because rates have been maintained at a low level even though EDF's costs have continued to rise. Rates will have to be increased in the short or medium term because all economic indicators point to cost rises and prices must reflect this trend.
Second, France's electrical power situation has changed: a structural exporter for some 20 years, we now import electricity in winter and depend on our German neighbor, which has had to make major strategic decisions after abandoning its nuclear program. For 20 years, we have experienced new peaks in power demand (93.752 megawatts on December 14, 2010 according to data published by the Réseau de Transport d'Electricité [RTE], compared to 93.080 megawatts on February 11, 2010). Unfortunately, this peak demand will likely increase on a yearly basis over the next 10 years. France thus imports its electricity during these peak periods, mainly from Germany. And Germany's abandonment of nuclear power may have serious consequences for our ability to get through these peaks.

4- The serious economic crisis, which is constraining the budgets of individuals and central and local governments, makes it all the more difficult to implement energy efficiency programs

Until now, central governments have used tax and financial incentives as leverage to change the behavior of economic players. By placing strong pressure on government budgets, the crisis is limiting this set of incentives.
Household behaviors are therefore the major drivers of energy efficiency. We know that households are sensitive to the financial impact of energy efficiency. According the survey, French households are willing to invest in more expensive equipment if it's more profitable in the short or medium term (69%), but they are not willing to spend more without any prospect for potential savings (18%). The results are comparable in the other countries studied.
These results have been corroborated by several surveys, especially the Eurobarometer of April 2011, which showed that the consumers are not willing to pay more for energy but are willing to implement energy-efficient measures if the impact on their budget is limited over time. Citizen-consumers are very sensitive to energy prices, which politicians know all too well, but rather than entertaining illusions, they should use tools designed to increase energy efficiency. Decision-makers all along the energy supply chain should be made aware of this expressed need: what resources are households offered for measuring their energy consumption and the savings they can achieve?

5- To take further steps to be energy efficient, consumers want information about their electricity consumption and the savings they can expect from changing their behaviors or from their investments

The survey reveals a relatively large gap between households' interest in being energy efficient and their specific knowledge. This is especially unfortunate since they report a willingness to devote time to adopting certain energy-saving behaviors (76% of French respondents claim they are willing). This availability is a very important factor that has been previously underestimated.

A smart electric meter, linked to future smart grids, are probably one of the keys to adopting energy efficiency measures. They will allow individuals to measure their energy use as well as their financial return on investments. These grids will enable the development of renewable energies and the installation of electrical equipment in buildings for the purpose of, for example, adjusting energy consumption on the basis of price and production capacity.
In the shorter term, the French will need access to more information about the profitability of the energy-efficient products and services that they are offered.