

*“General consumers and the question of energy efficiency”*

*Rexel unveils the results of the first international survey<sup>1</sup>  
conducted by Harris Interactive*

**AMERICANS READY TO REDUCE  
THEIR ELECTRICAL CONSUMPTION BUT ARE IN NEED OF  
INFORMATION AND ADVICE FROM EXPERTS**

Energy efficiency aims to reduce energy consumption without deteriorating the level of service and therefore reduce economic, ecological and social costs. Professionals in this field are very familiar with the issue, but how do 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? And how do they view energy efficiency, as compared with citizens in France, England and Germany?

Rexel, a leading worldwide distributor of electrical supplies, called on Harris Interactive to ask a representative population from the United States, France, England, and Germany for their answers to these key questions.

The results of the survey reveal that, for most people, energy efficiency is important and requires action. In fact, respondents from all four countries see the subject of energy efficiency as important: between 86% and 95% of respondents judge the subject as important, of which nearly two-thirds say it is “very important”.

The survey also found that Americans consider themselves responsible for electrical efficiency and its promotion. They have already adopted some new habits and select applications according to their energy consumption. The issue of energy efficiency also appears to be inextricably linked to financial considerations. 54% of Americans cited the excessively high price of low-energy products as an obstacle in becoming more energy efficient. 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.

Among all respondents, nine out of ten citizens view energy efficiency as an “important” issue, but after looking at the data they only have a superficial understanding of the measures already taken.

Although Americans are aware of energy efficiency issues, and believe they are informed about the measures taken in their country, their knowledge is actually somewhat limited. In the U.S. three out of four people claim to have heard that incandescent light bulbs are being phased out, but only 46% know exactly what the incandescent lamp phase out is. Similarly, in the U.S., 88% of respondents have heard of the Federal and State Government tax incentives related to home heating and ventilation systems and renewable energy devices, however, only 34% of them know exactly what it is.

U.S. respondents said that improving energy efficiency is justified for three important reasons: the desire to reduce expenses (97% said good reason, of whom 75% consider this to be a very good reason); the guarantee of energy security (95% said good reason, of whom 53% believe this to be a very good reason); environmental protection (91% said this was a good reason).

*“This survey shows that we are moving towards a new energy model. As market leader, Rexel is particularly involved in accelerating change through innovative solutions and education that informs*

<sup>1</sup> 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.

*our clients how to adopt eco-efficient solutions. As a distributor we continue to play a driving role in energy efficiency issues within the electrical field,” says Chris Hartmann, CEO of Rexel Holdings USA. “It is also important for people to know that energy efficiency is not a one size fits all approach. Everybody can do their part even on the smallest level by simply upgrading to energy efficient light bulbs, but Americans should know that there are solutions available to accommodate varying levels of budget and energy objectives.”*

American respondents also said that while they pay attention to their energy consumption (89%), many lack information about practical steps they can take towards improving their own energy efficiency. Only 33% regularly defrost their freezer and refrigerator, 52% fill the washing machine to the top before starting the wash cycle and 56% shut off electronic devices rather than switching to stand-by.

By publishing this study, Rexel solidifies its role as an industry leader in providing energy efficient solutions within the electrical sector and its active participation in developing partnerships with manufacturers and contractors. Rexel has also set up an information site, [www.electrical-efficiency.com/](http://www.electrical-efficiency.com/), in order to promote awareness of electrical efficiency issues.

### **From small everyday habits to dedicated applications, our households are committed to the issue**

Americans are very aware of energy efficiency issues and to some extent have already changed their everyday habits to save energy. For example: 69% of Americans purchase low energy light bulbs and 64% use power strips.

As far as investments are concerned, 72% of Americans have already, or are willing to, install an environmentally-friendly hot water system, and 75% would consider installing an eco-efficient heating system.

### **The issue of energy efficiency is strongly influenced by financial considerations**

Respondents say they would make 3 types of effort to improve their energy efficiency: efforts in terms of time (76% in France, 82% in the UK, 75% in the USA), 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 interested in the impact on their personal finances and tended to be torn between spending less in the short term and investments that reduce energy costs in the short and medium term.

### **Rexel: a market leader committed to promoting efficient electrical solutions**

For 85% of American’s, distributors of electrical material 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](http://www.electrical-efficiency.com) website.

Present in 36 countries, the Rexel group advises clients and selects the best solutions to master energy in buildings, optimize lighting and heating, install intelligent systems to pilot and regulate electricity consumption.

#### **About Rexel Holdings USA**

Rexel Holdings USA is the U.S. subsidiary of Rexel Group, a global leader in the distribution of electrical products, and a broad range of innovative energy management solutions. With annual sales of more than \$3.5 billion, 5,200 employees and 300 branches throughout the U.S., Rexel Holdings USA is a market leader serving the industrial, commercial and residential construction markets through both its Gexpro and Rexel commercial brands. The Company offers electrical and data communications products in addition to an integrated platform of solutions and services in energy efficiency and renewable energy, from lighting upgrades to alternative energy technologies, helping customers maximize their business operations.

For more information, please visit [www.rexelholdingsusa.com](http://www.rexelholdingsusa.com).

#### **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](http://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](http://www.harrisinteractive.fr).

#### **CONTACTS**

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## INTERVIEW WITH CHRIS HARTMANN CEO OF REXEL HOLDINGS USA

### **Why this international survey on energy efficiency?**

Because there's a lot at stake. We know that professionals are aware of what's at stake, but we needed to know how the general public perceives the issue, their everyday habits and what encourages them to take action or holds them back. This question is not only of interest to professionals in this field. It also interests public authorities, associations...and above all, citizens and consumers. With the increase in fuel prices and the Fukushima disaster, people are worried about their buying power and energy and ecology in the future. This study enables them to compare their everyday habits and find new ways to take concrete action.

### **What is Rexel's position as far as energy efficiency is concerned?**

As a leader, close to its customers on a daily basis throughout the world, and particularly committed to promoting eco-efficient solutions, we felt it was necessary to do an overall review and publish the results for those who influence electrical efficiency. As we are present in 36 countries, we also wished to underline the differences in practices and perceptions of 4 large countries. Although the issues are global, there are still cultural, historical and economic factors. Like all global and multi-local players, we have to take those differences into account.

### **As a leader in the distribution of electrical materials, how do you see the energy efficiency market evolving?**

The market is dynamic; there is no doubt about that. At Rexel, we take great pride in offering our clients the most innovative solutions in terms of electrical efficiency and we have noticed that clients are investing: our global sales of renewable energy solutions (wind turbines, photovoltaic) increased by 40% between 2009 and 2010 and reached almost 270 million euros, and the group sold 230 million euros of low-energy light fittings in 2010 (an increase of 35% compared to 2009). Our consultancy and service business lines are also growing: for example, we are involved in energy and technical management of buildings or in the field of low-energy lighting for private companies or local authorities.

### **What is Rexel doing to promote energy efficiency?**

We were among the first to develop custom-made consultancy services for our clients, giving them a return on investment in the field of electrical efficiency.

We also need information to accelerate the development of energy efficiency. The survey results reveal that. That's why Rexel has launched the [www.electrical-efficiency.com/](http://www.electrical-efficiency.com/) website to give clients and partners access to information about the market, solutions and rules. Of course, as a company, we have drawn up a number of actions to minimize our energy consumption and reduce impact on the environment.

### **What strikes you with these results?**

The sense of responsibility among citizens. Our survey shows that 95% of American people consider energy efficiency to be an important subject and that it is up to consumers to take action in favor of energy efficiency, before the state or industry. That means there is huge potential for developing electrical efficiency. I was also interested to see that citizens would like to be able to see the results of their efforts in the shape of lower energy bills. I think that is something we as professionals should be looking at in the future.

### **What are your priorities and what can you do now?**

I am convinced that we can make even more progress on energy consumption in buildings. Why? Because buildings currently account for 40% of world energy consumption. Rexel is taking up the challenge with the eco-efficient solutions it promotes, the development of its custom consultancy and training for professionals. We must also persist in informing people both within the industry and in institutions, on the attitudes and technologies that improve energy savings.

### **The last word?**

Tomorrow's world should consume less and electricity will have a prominent position among energy uses. With the development of renewable energy, home automation and the convergence of thermal, digital and electrical worlds, everything points to electricity being the main source of energy for tomorrow.

This survey shows that we are moving towards a new energy model. As a market leader, Rexel is particularly involved in accelerating change, helping clients create eco-efficient solutions and continuing to play a driving role in energy efficiency issues within the electrical field.



level of familiarity with the measures introduced nationally to encourage energy efficiency. Thus, **a large majority of Americans claim to know each of the three measures tested** (between 93% and 75%), two of which were more clearly identified than the other: the Energy Star appliances and purchase rebates (well known to 69%) and the financial incentives offered by federal government (well known to 54%). The upcoming ban on incandescent bulbs, known to 75% of Americans, was clearly identified by only 46%.

Responses show Americans consider energy efficiency to be important and pay attention to it. **Energy efficiency is justified, in their opinion, not only for environmental protection** (91% judge this to be a good reason, with 58% believing it to be a very good reason), but also to two other considerations: (1) **the desire to reduce expenses** (97%, of whom 75% consider this to be a very good reason) and (2) the **guarantee of energy security** (92%, of whom 53% believe this to be a very good reason). The **Americans therefore look at energy efficiency with an accounting eye**, in a both concrete and locally focused way. Moreover, while they point out the role of consumers in promoting energy efficiency, they also highlight the role of the individual state governments whose actions are stressed even more than that of national government (78% compared to 76%).

### **An absence of knowledge results in a relatively low implementation of ecologically friendly practices in everyday life**

Americans seem to lack information about many practical steps towards of energy efficiency and, as a result, do not always exhibit behavior conducive to its ends. In effect, **certain everyday actions that help reduce energy consumption** (completely filling the washing machine before starting it, switching off appliances rather than setting them to stand-by, etc.) **do not yet appear to have been fully adopted, in particular given the number of people who state that they pay attention to their energy consumption.**

As a consequence, **Americans seem to want to be informed of the ecological impact of these small actions:** one in five wants to obtain more information about this type of behavior, which is the second most cited item after “what works need to be done in the home to make it energy efficient”.

### **Great potential for improvement based on better information and the development of investments that pay for themselves**

Americans do indeed seem to have **great potential in terms of reducing energy consumption.** On the one hand, even if the everyday behavior of Americans does not seem to be conducive to improved energy efficiency, **75% of them say that they are prepared to invest more of their own time in order to save energy**



# General Consumers and Energy Efficiency

Report redacted by:

Jean-Daniel Lévy, Head of the Public Opinion Department

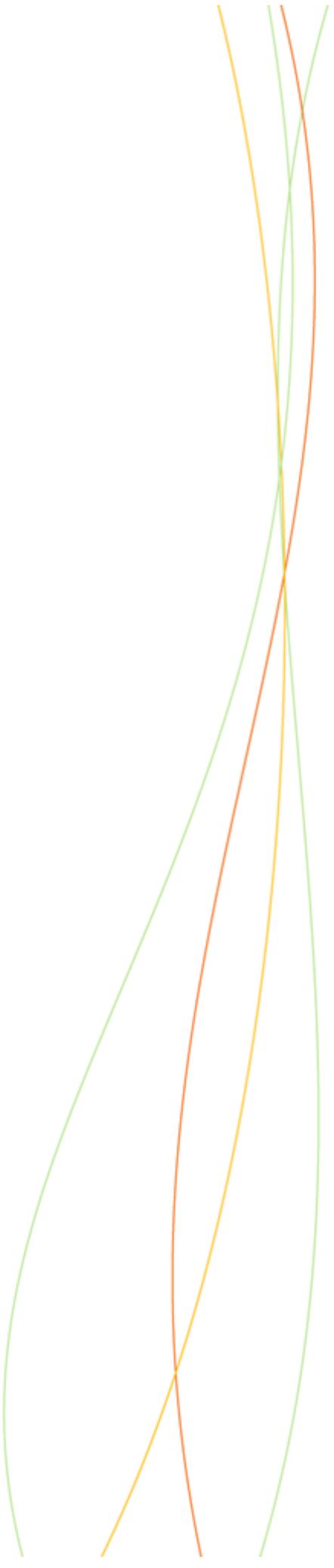
Gaspard Lancrey-Javal, Research Executive at the Public Opinion Department

Jamie Bettison, Research Executive at NetObserver



## Methodology

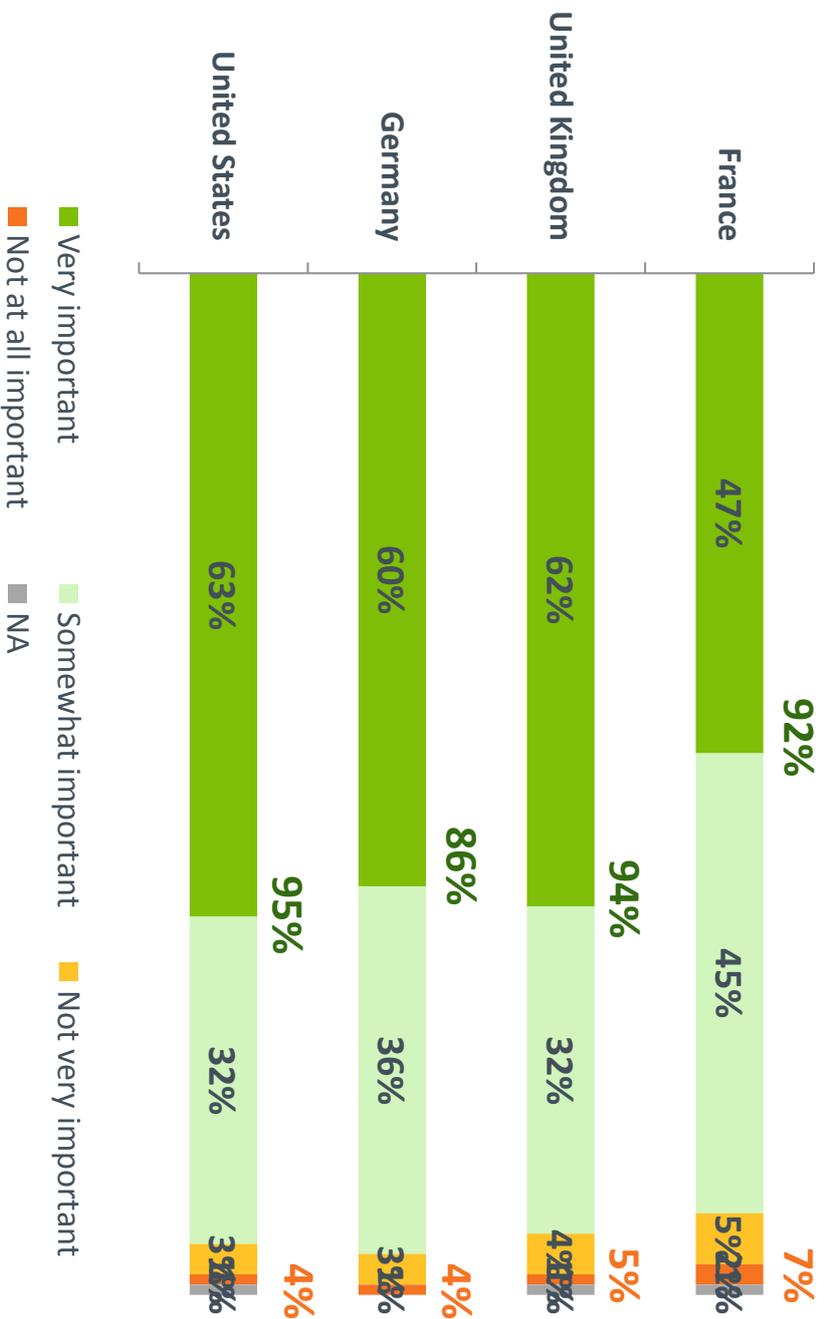
- *A quantitative online survey conducted by means of the Harris Interactive access panel among a representative sample of the national 18+ population in each of the 4 countries : France, UK, Germany, USA. **4,000 interviews total** (1,000 in each country)*
- *Field work conducted between 9-19 July 2011*
- *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



# 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?*



■ Very important    
 ■ Somewhat important    
 ■ Not very important    
 ■ Not at all important    
 ■ NA

# Attention Paid to One's Own Energy Consumption

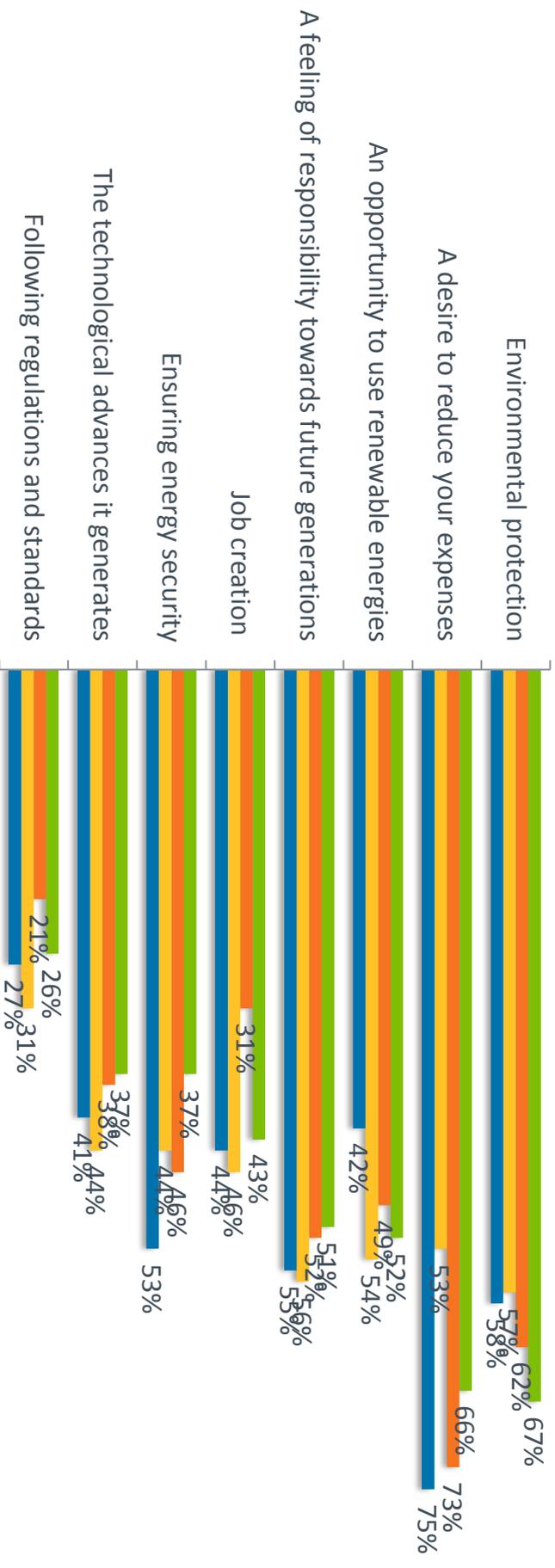
*How much do you personally pay attention to your energy consumption: very much, somewhat, not very much or not at all?*



# Summary Chart: Evaluating Various Reasons to Promote Energy Efficiency

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

**% Very good reason**

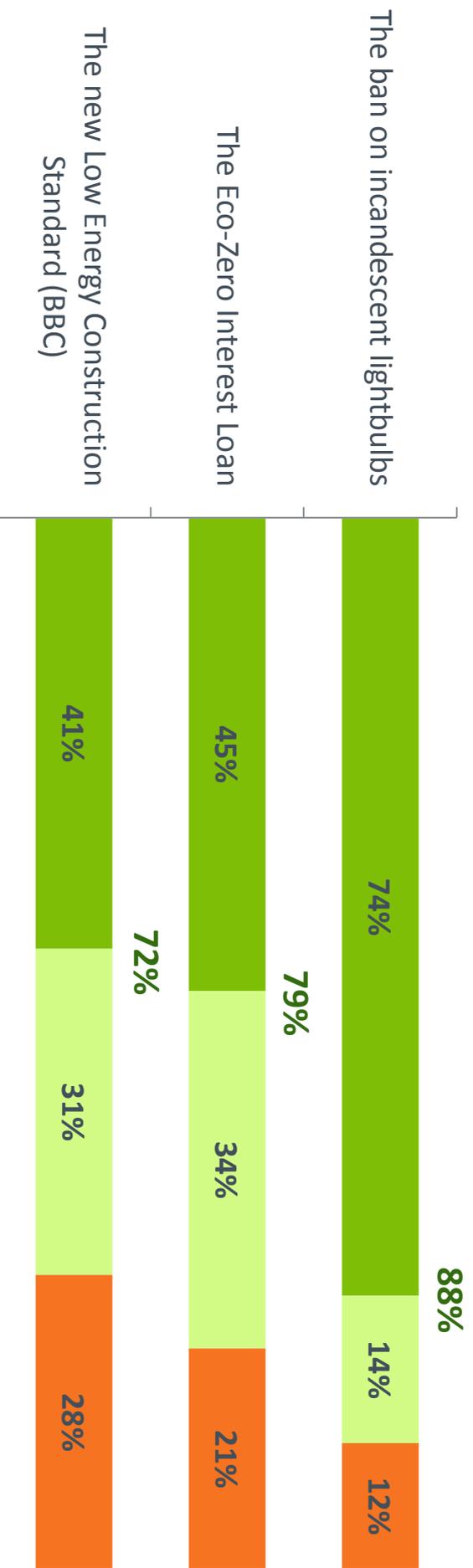


■ France 
 ■ United Kingdom 
 ■ Germany 
 ■ United States

# Energy Efficiency-Encouraging Measures Recognition in France

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

France

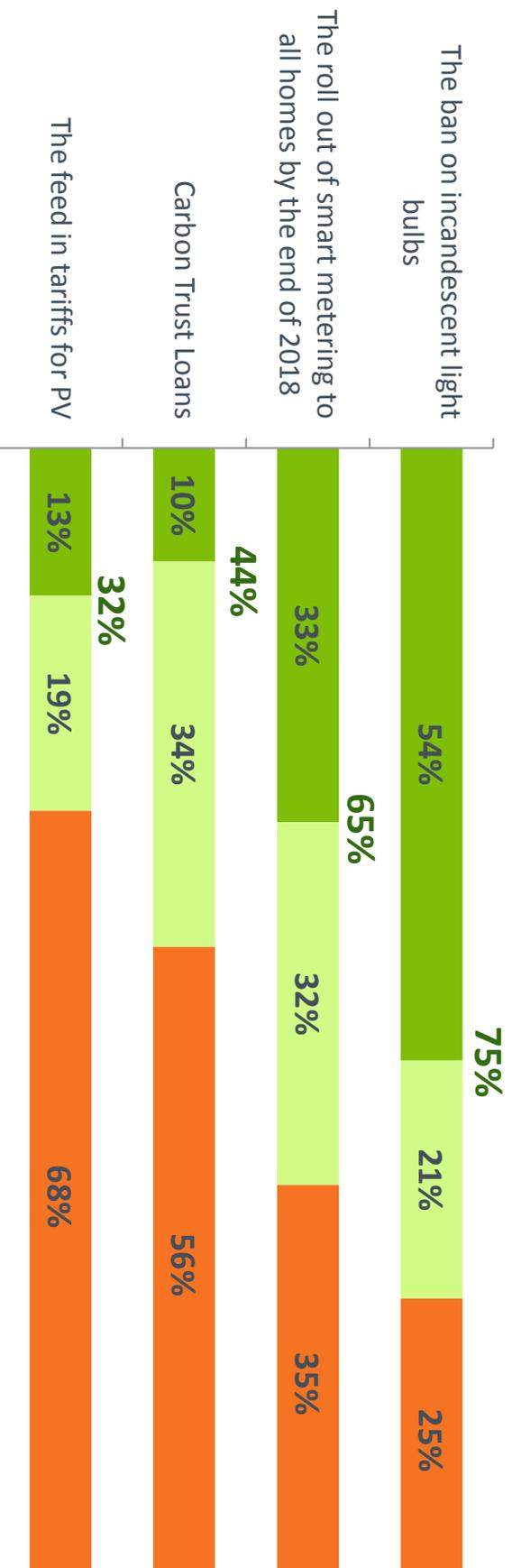


■ Yes and I know it well ■ Yes, but I don't really understand it ■ No

# Energy Efficiency-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?*

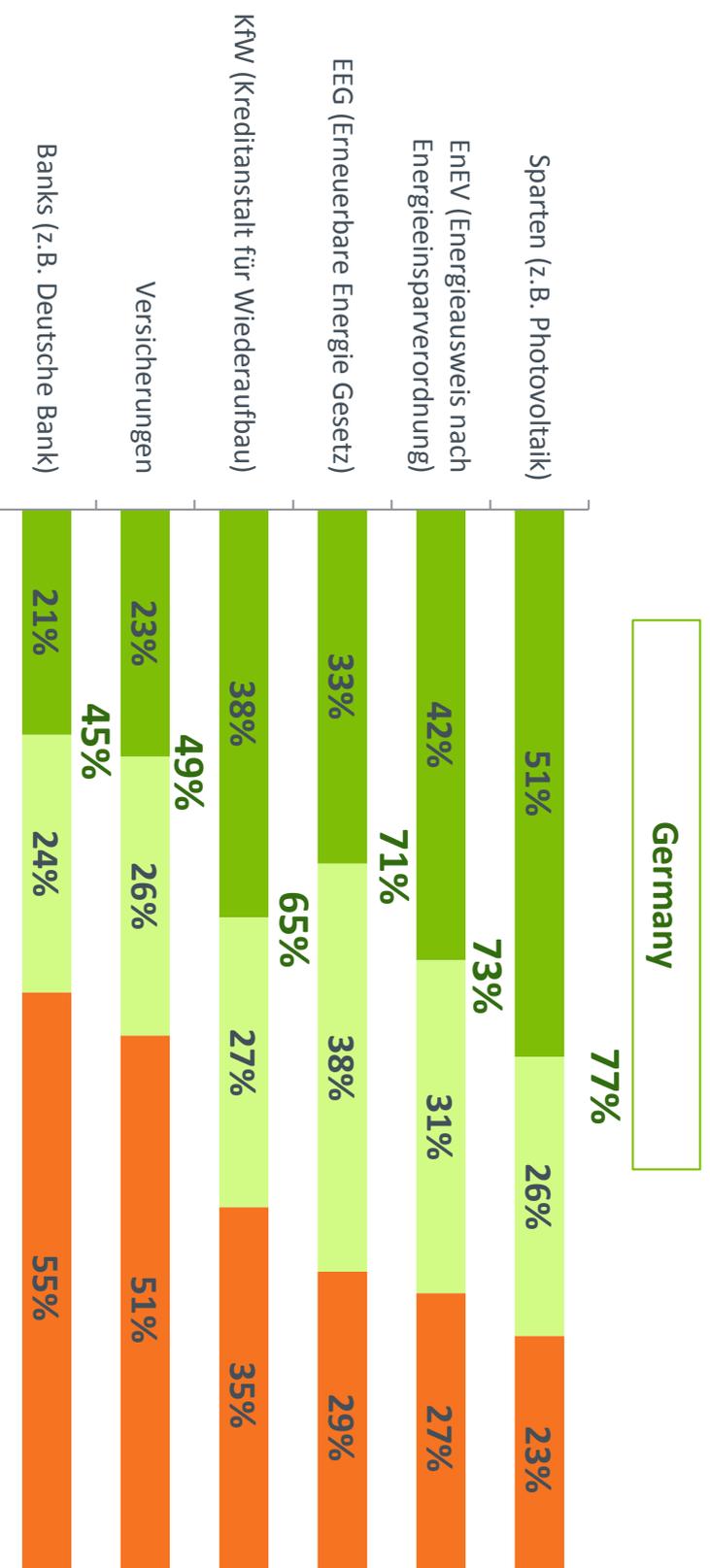
United Kingdom



■ Yes and I know it well    ■ Yes, but I don't really understand it    ■ No

# Energy Efficiency-Encouraging Measures Recognition in Germany

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



■ Yes and I know it well

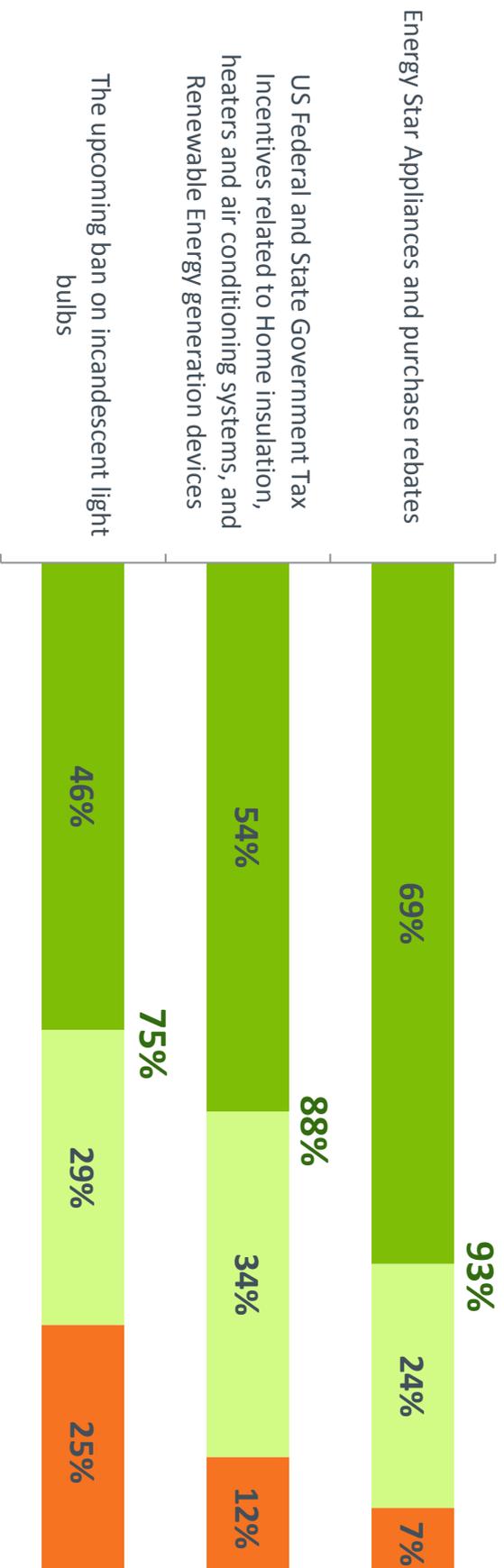
■ Yes, but I don't really understand it

■ No

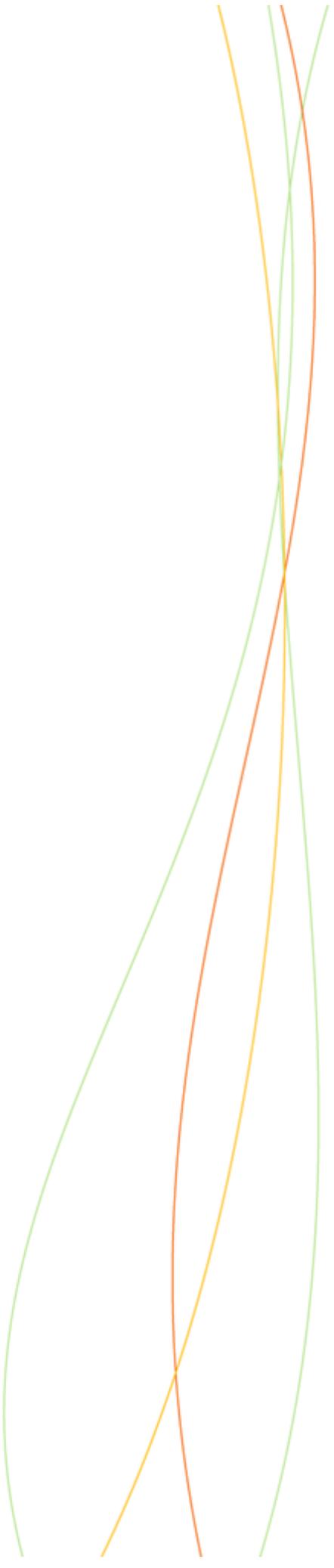
# Energy Efficiency-Encouraging Measures Recognition in the United States

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

United States



- Yes and I know it well
- Yes, but I don't really understand it
- No

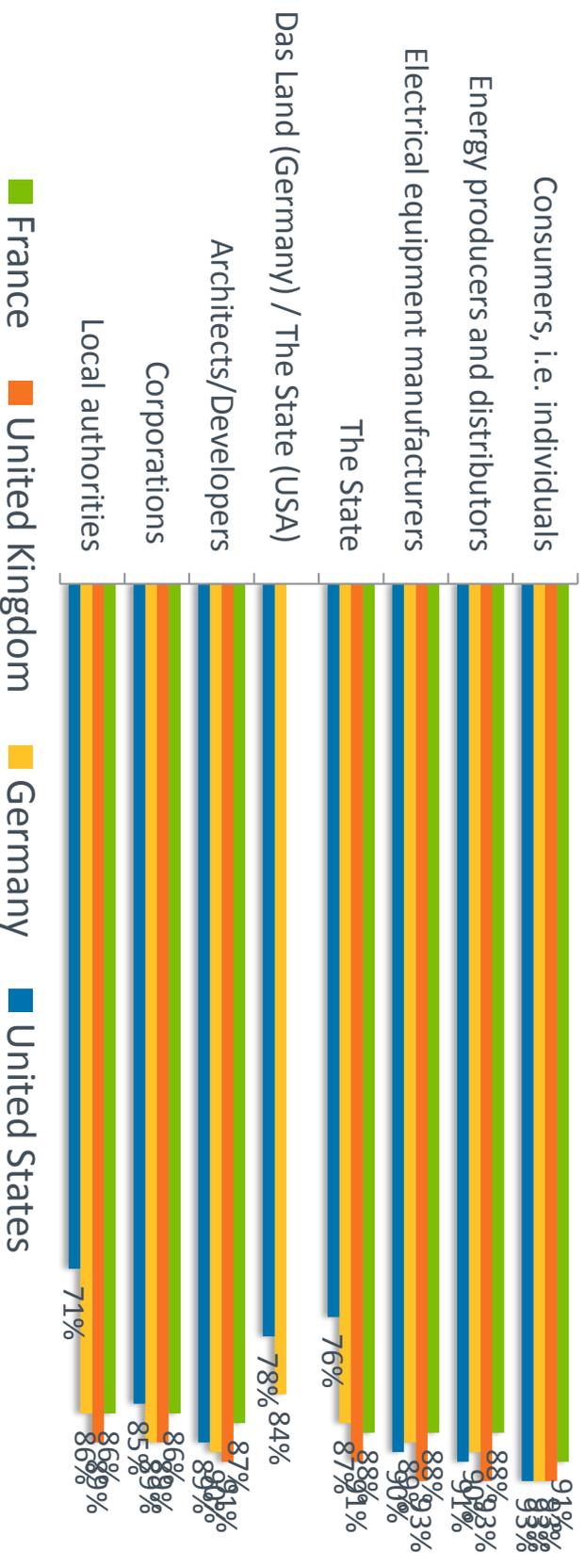


# The Stakeholders of Energy Efficiency

# 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**

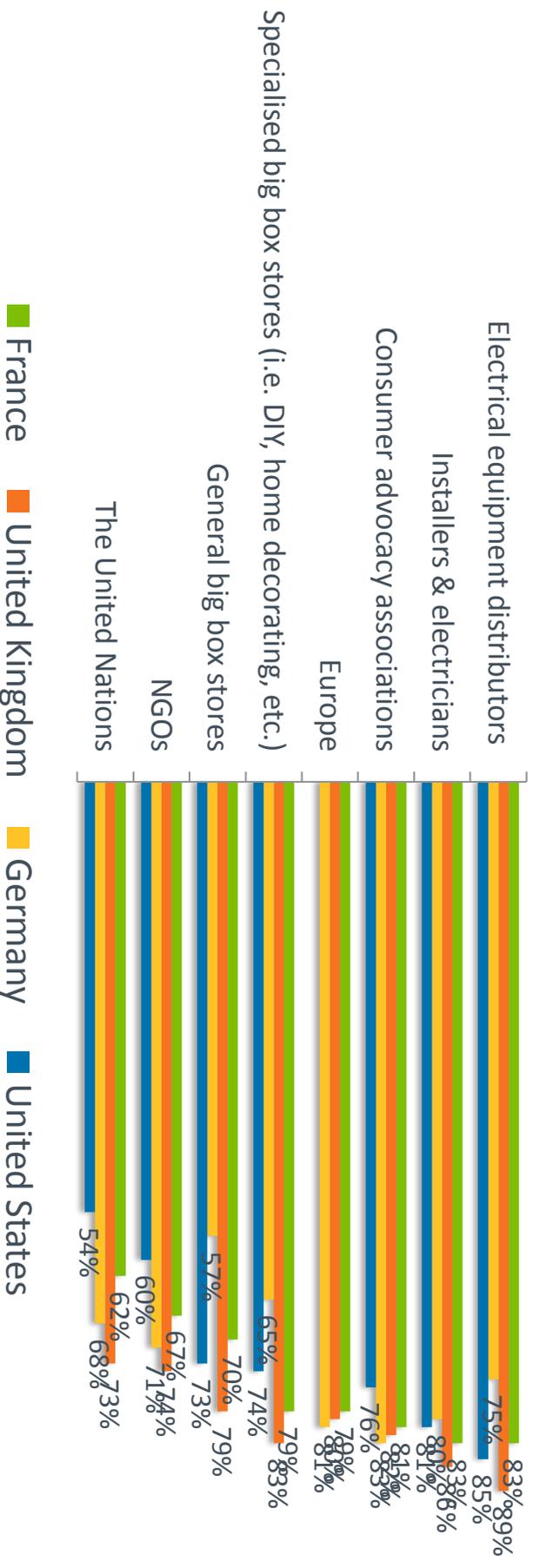


■ France 
 ■ United Kingdom 
 ■ Germany 
 ■ United States

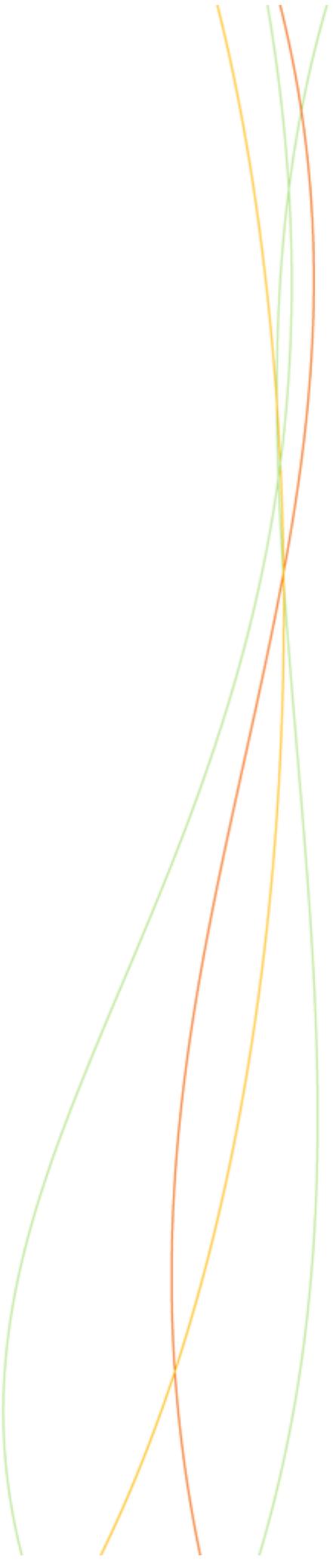
# The Stakeholders of Energy Efficiency: Summary Chart (2/2)

*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**



■ France ■ United Kingdom ■ Germany ■ United States

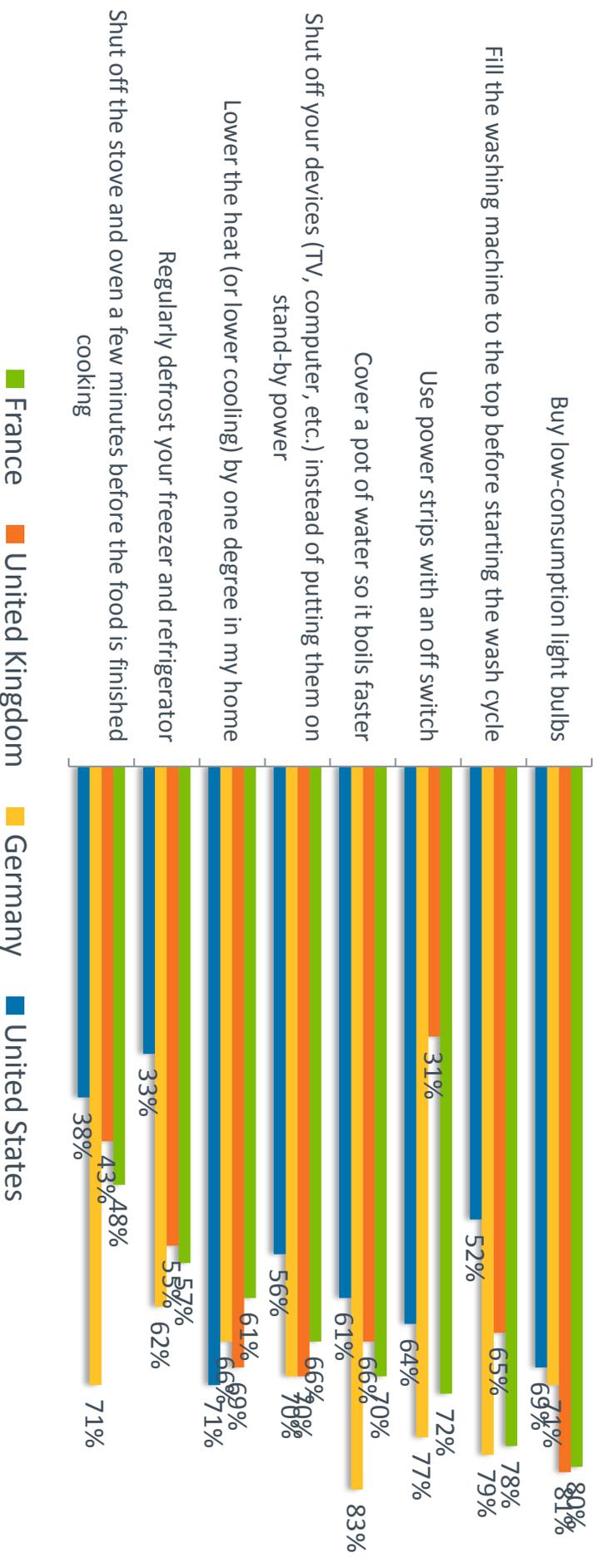


# Methods of Encouraging Electrical Efficiency

# 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.

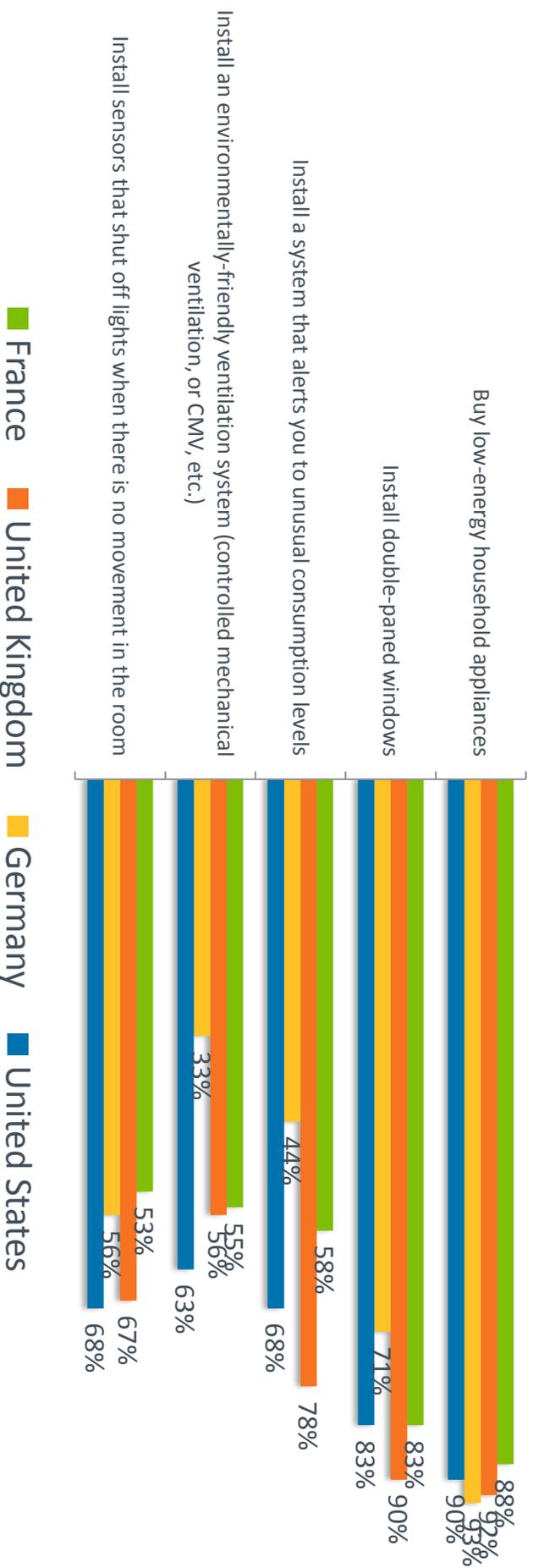
## % Already does it



# 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**

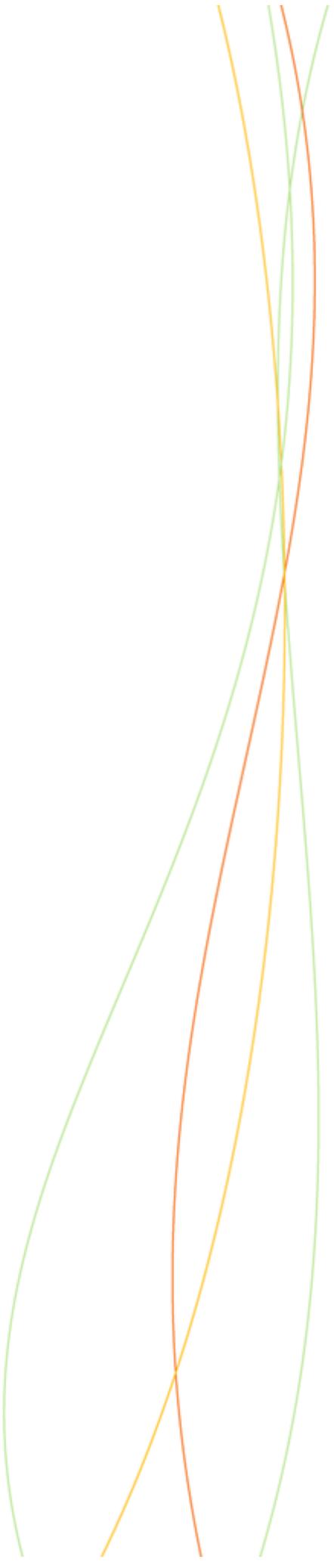


## Summary Chart: Energy Saving Investments (2/2)

*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**

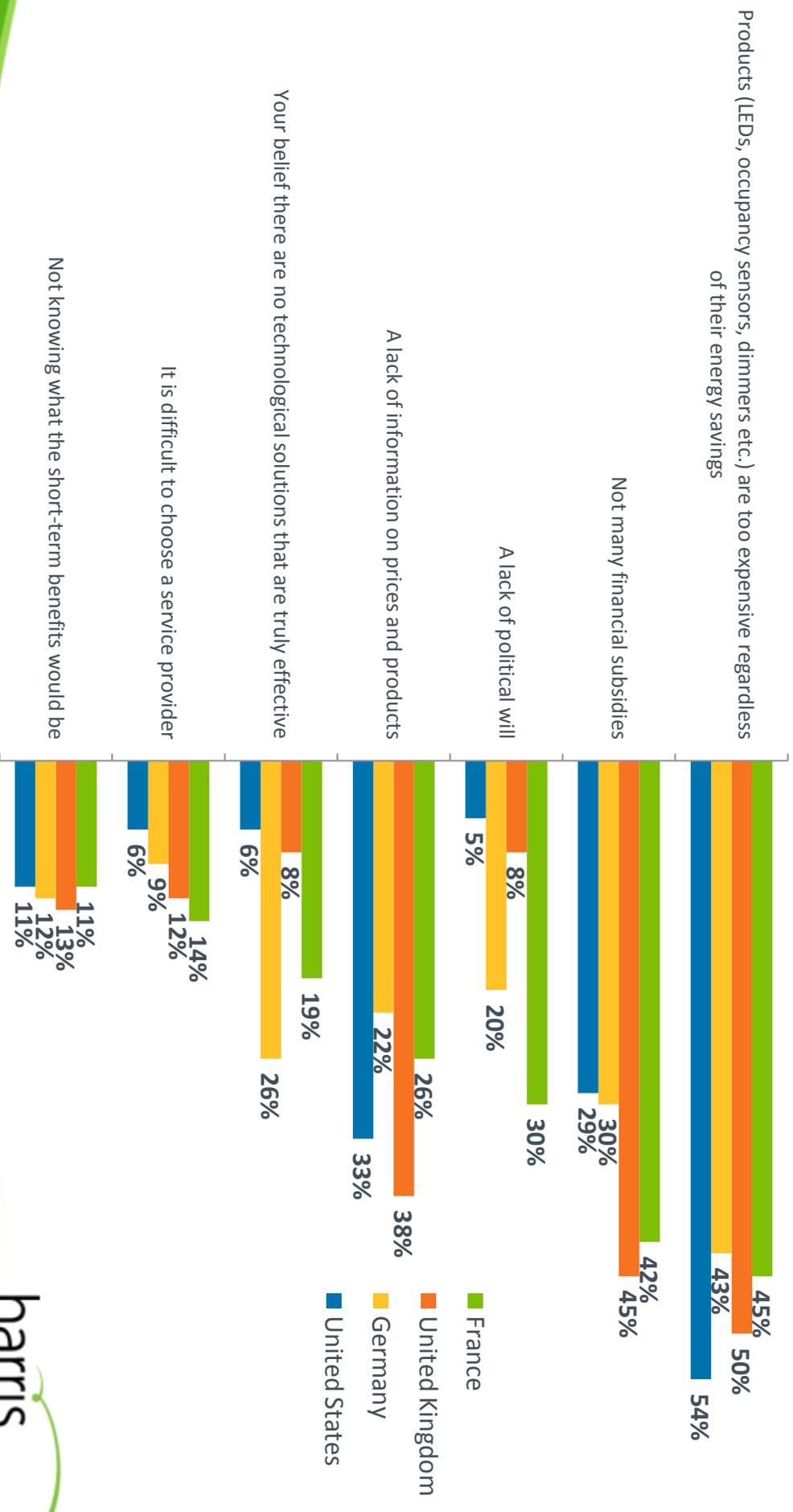




# Obstacles and Drivers

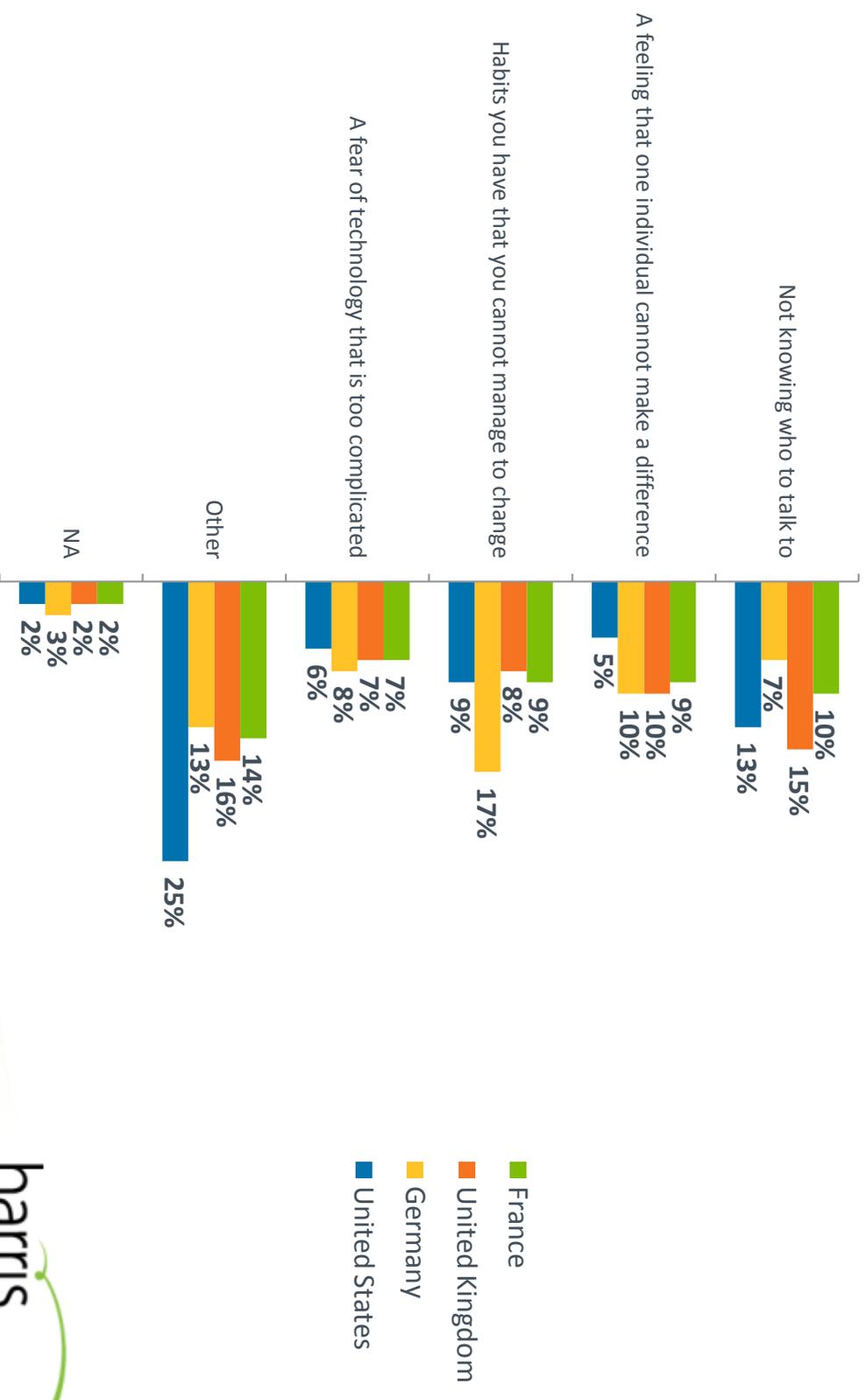
## Summary Chart : Obstacles in Saving Energy (1/2)

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



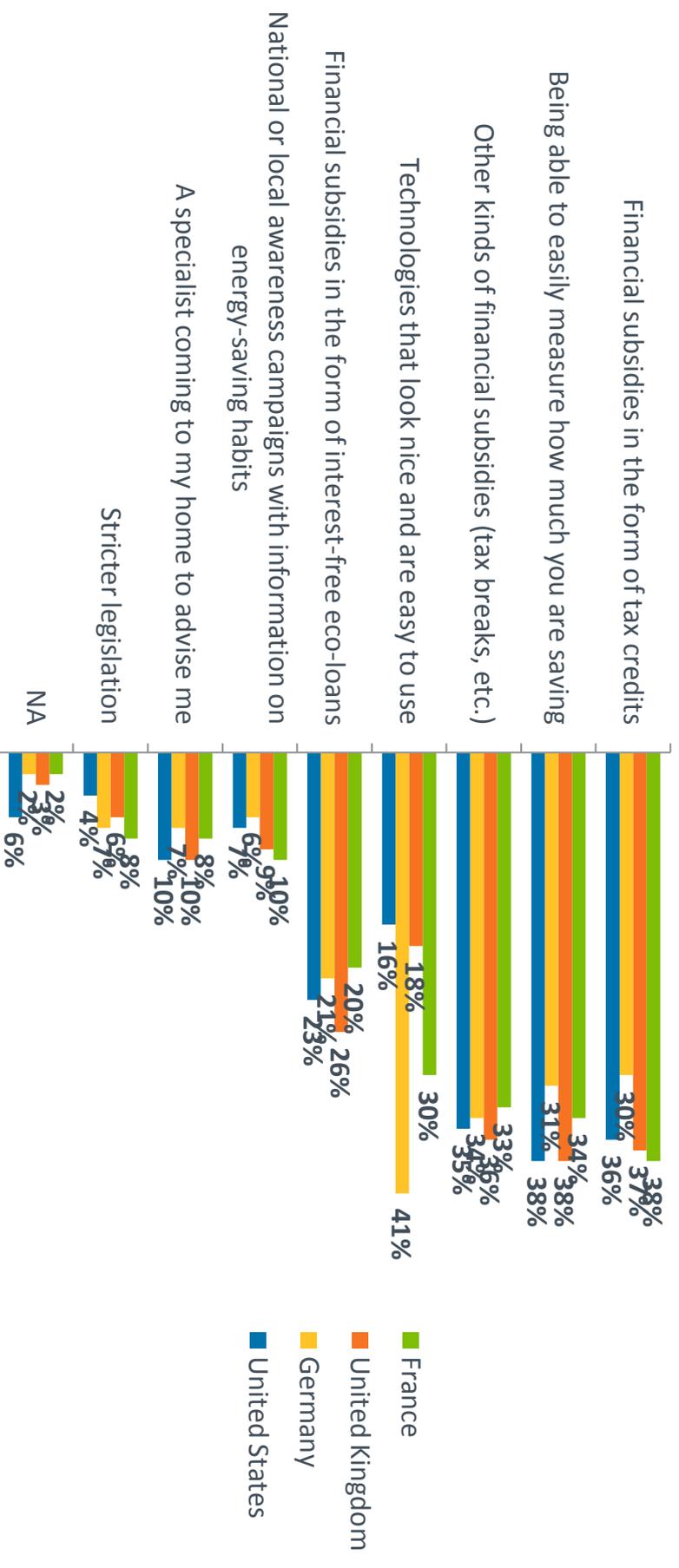
## Summary Chart : Obstacles in Saving Energy (2/2)

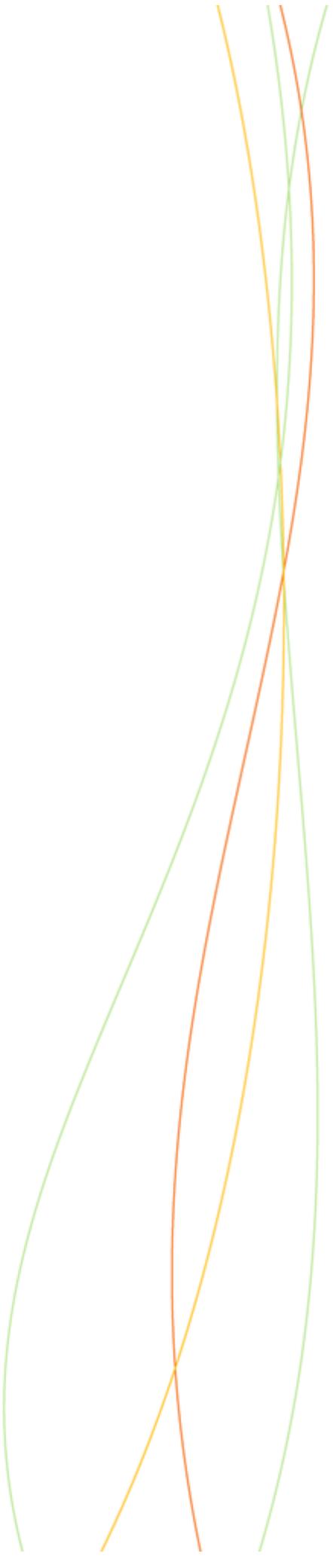
*What are the main obstacles stopping you from saving energy and increasing the efficiency of your energy consumption? (you may choose three answers)*



# 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)*

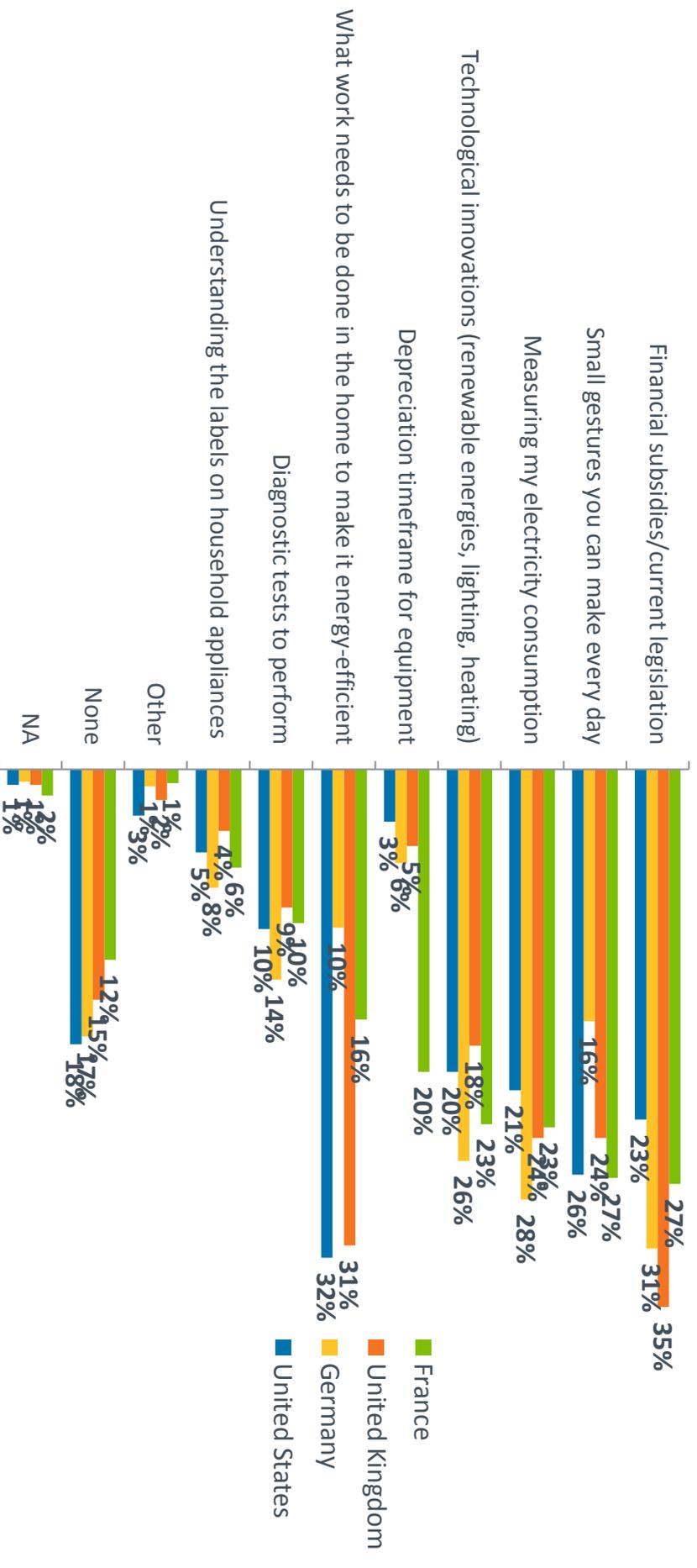




# Expectations

# 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?*

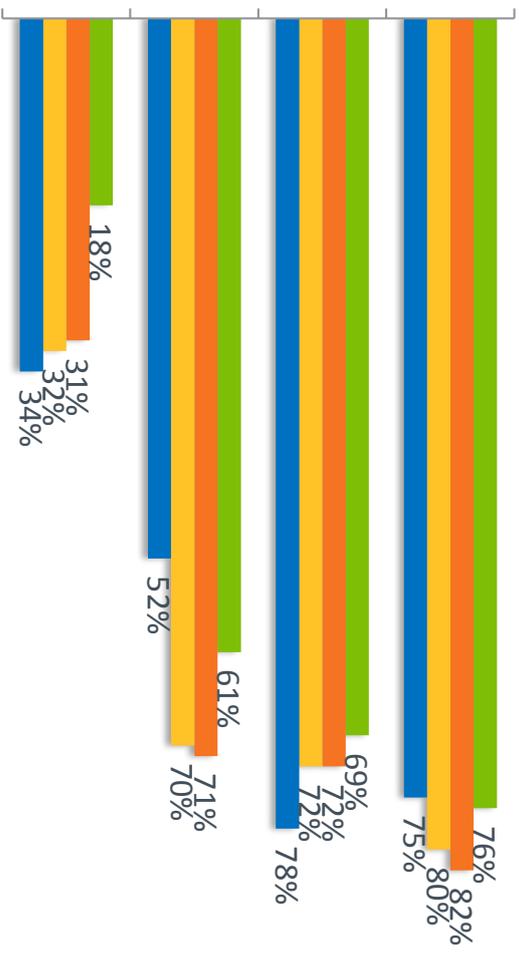
**% Willing**

Time-related efforts, as in spending more time doing some tasks and adopting certain time-consuming habits like shutting off all the power strips in the house every night, etc.

Efforts to invest in equipment that costs more, but pays for itself in the short or medium terms

Efforts to give up certain habits or 'convenience' appliances, such as not using a clothes dryer, taking colder showers, limiting the number of electronic devices, etc.

Budget-related efforts, as in paying more for energy



■ France 
 ■ United Kingdom 
 ■ Germany 
 ■ United States

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"<sup>1</sup> 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.**

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<sup>1</sup> A French system in which the car buyer pays a surcharge or additional tax (malus) if the car emits too much CO<sub>2</sub> 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 to 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.