## Vattenfall Energy Savings Barometer Q1/2023





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### Methodology

# The Vattenfall Energy Savings Barometer tracks changes in energy consumption patterns, attitudes and investments among consumers in 5 European countries



Background Quarterly survey to gain insights into consumer behaviour and attitudes in the area of energy consumption among European consumers and how these develop over time.



Methodology

- Quantitative survey via online-access-panel
- Length of interview: 5 minutes



- Regions: Sweden, Finland, Germany, France and the Netherlands
- Population 18+
- Quoted based on national representative spread regarding gender, age & region
- n=1,000 per country and wave



Field time January 13<sup>th</sup> - January 23<sup>rd</sup> 2023



## **Country comparison**

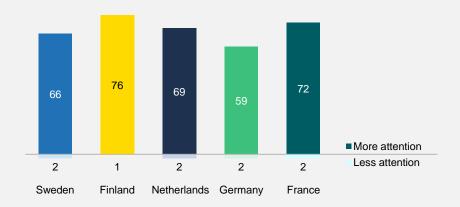




## The energy crisis raised consumer's attention to energy savings and emphasized the high relevance of conscious energy use in everyday life

### Attention to energy saving since last season

All respondents, in %



Countries

### Relevance of lower energy consumption

All respondents, in % (scale 1="Not relevant at all" to 4="Very relevant", top 2 values shown)



#### Countries

Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Source: Statista 2023

Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Response option "I pay the same attention" not displayed; Source: Statista 2023







## Consumers uptake several energy saving measures; the French use energy more sustainably, while the Nordics are less flexible due to cold winters

Countries

#### Measures to reduce energy consumption

All respondents, in %

	Sweden		Finland		Netherlands		Germany		France	
Using less lights	77	16	80	14	79	13	76	16	81	13
Cooking with lid	71	22	68	24	78	16	80	15	79	15
Lower room temperature	55	25	61	24	79	12	77	14	77	13
Reduce shower time	65	22	68	19	74	14	67	20	76	15
Heating most used rooms only	48	30	49	28	82	13	77	16	74	16
Washing clothes at max. 40°	56	25	53	27	69	19	63	24	76	15
Reducing standby	60	29	58	33	56	33	62	28	61	29
Using my car less often	60	21	58	20	58	22	56	24	61	20
Using electric devices less	59	27	62	26	53	28	51	29	62	24
Cooking one pot dishes	57	32	48	33	37 37		39 30	6	54	28
Having colder showers	32 31		41	31	31 27		32 27		31 26	
Going to bed earlier	31 30		25 34		31 30		24 30		34 28	
Spending less time at home	17 28		14 25		19 28		16 29		24 <b>27</b>	
Changing energy supplier	16 52		15 59		16 49		21 48		17 38	

Do it already Open to do it in the future

Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; Source: Statista 2023





## Main drivers for saving energy is not the conviction to save the planet but financial ones; France is more eco-focused in country comparison

#### Motivators to reduce energy consumption

All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me strongly", top 2 values shown)



Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Source: Statista 2023

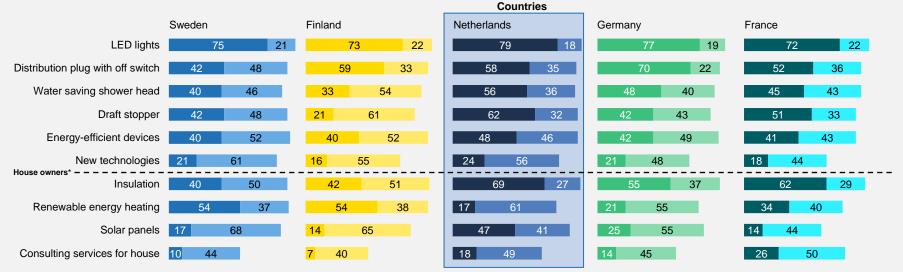




## Dutch households are more often equipped with energy-efficient technology especially in terms of easily implementable features

#### Investments to reduce energy consumption

All respondents, in %



Already invested Willingness for future investment

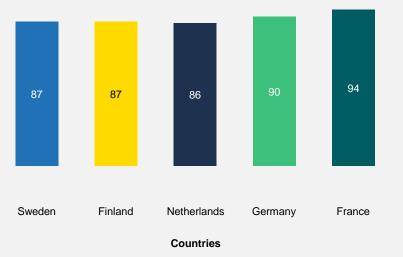
Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; \*respondents who are house owners: SWE Total n=315, FIN Total n=300, NLD Total n=504, DEU Total n=282, FRA Total n=450; Response option "I would never make investments in this area" not displayed; Source: Statista 2023



## Concern about energy prices is high in all countries; French fear that the situation will continue to worse while Dutch and Finns are more optimistic

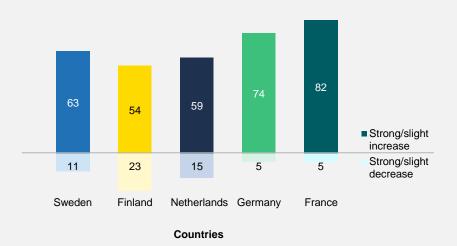
#### Concern regarding energy prices

All respondents, in % (scale 1="Not concerned at all" to 4="Very concerned", top 2 values shown)



### Expected energy price trends

All respondents, in %



Question: F10 How concerned are you regarding the current energy prices?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Source: Statista 2023

Question: F12 How will energy prices develop in the next year according to your opinion?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Source: Statista 2023











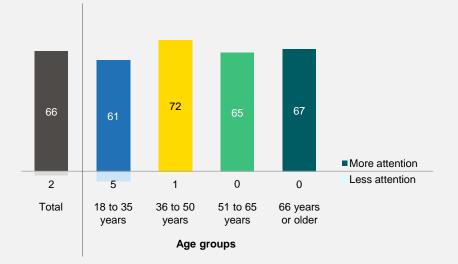
## Two thirds of Swedes increased their attention to everyday energy saving compared to last season; The topic has high relevance overall

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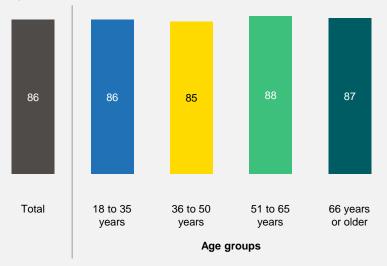
#### Attention to energy saving since last season

All respondents, in %



#### **Relevance of lower energy consumption**

All respondents, in % (scale 1="Not relevant at all" to 4="Very relevant", top 2 values shown)



Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Source: Statista 2023

Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Response option "I pay the same attention" not displayed; Source: Statista 2023

## People older than 50 years save energy routinely – The youngest age group lags behind, but they have a high willingness for future efforts

#### Measures to reduce energy consumption

All respondents, in %

Total		Age groups							
		18 to 35 years		36 to 50 years	6	51 to 65 years		66 years or o	lder
Using less lights	77 16	67	24	76	17	85	10	84	9
Cooking with lid	71 22	57	33	72	20	81	14	80	14
Reduce shower time	65 22	49	34	65	21	75	12	80	11
Reducing standby	60 29	52	38	61	25	72	20	57	31
Using my car less often	60 21	51	30	64	20	61	16	70	15
Using electric devices less	59 27	48	35	59	27	68	21	67	17
Cooking one pot dishes	57 32	46	40	56	34	72	19	56	29
Washing clothes at max. 40°	56 25	50	31	58	24	64	20	54	20
Lower room temperature	55 25	49	33	54	23	60	20	62	18
Heating most used rooms only	48 30	41	40	49	28	54	23	49	27
Having colder showers	32 31	27 40		31 34		39 23		30 24	
Going to bed earlier	31 30	35 38	3	34 29		30 23		16 27	
Spending less time at home	17 28	23 40		21 26		13 20		6 17	
Changing energy supplier	16 52	15 57		22 56		14 51		16 39	

Do it already Open to do it in the future

Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; Source: Statista 2023

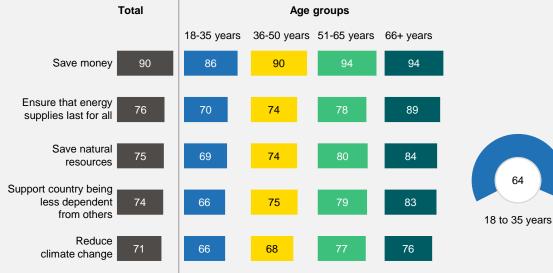


strongly", top 2 values shown)

Motivators to reduce energy consumption

All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me

## Swedes are motivated to lower their energy consumption by saving money; Highest savings are expected by the youngest age group



#### Expected savings from measures

64

Respondents who reduce energy consumption, in % (scale 1="Very little" to 4="Very much". top 2 values shown)

Total

43

51 to 65 years

43

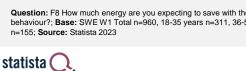
66 years or older

#### Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?: Base: SWE W1 Total n=960, 18-35 years n=311, 36-50 years n=245, 51-65 years n=249, 66+ years n=155: Source: Statista 2023

Age groups

Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: SWE W1 Total n=1.000. 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Source: Statista 2023

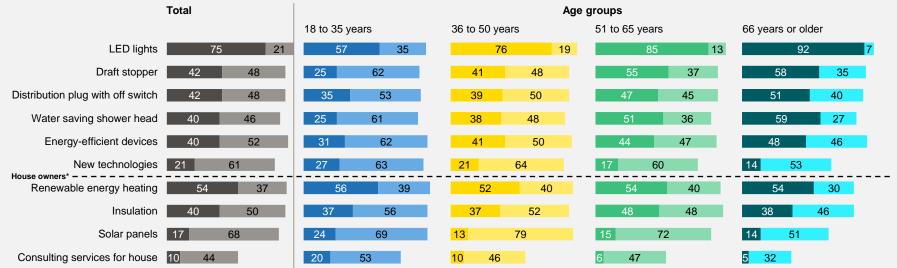
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53

36 to 50 years

## While people above 50 years have most often invested in energy efficient features, the youngest age group has the highest potential



#### Investments to reduce energy consumption

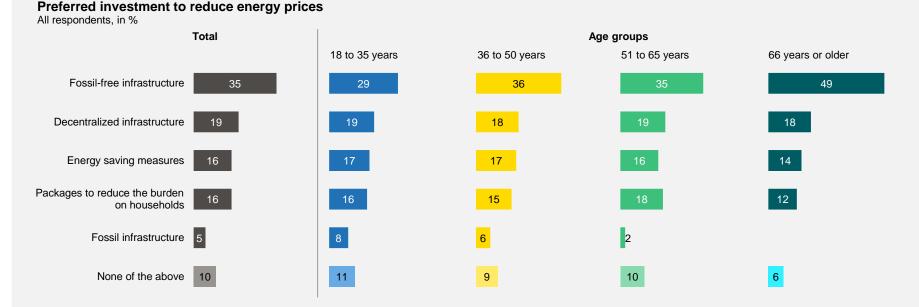
All respondents, in %

Already invested Willingness for future investment

Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; Base: GER W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; \*respondents who are house owners: Total n=315, 18-35 years n=70, 36-50 years n=84, 51-65 years n=76; Response option "I would never make investments in this area" not displayed; Source: Statista 2023



## Consumers want the government primarily to invest in fossil-free infrastructure to ease the energy crisis; Fossil energy sources rank last



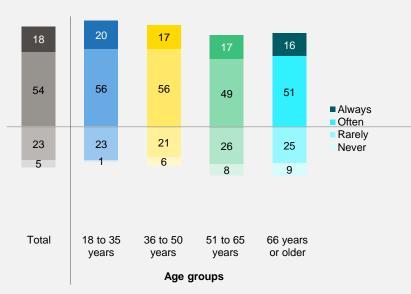
Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Source: Statista 2023



#### **Country specifics**

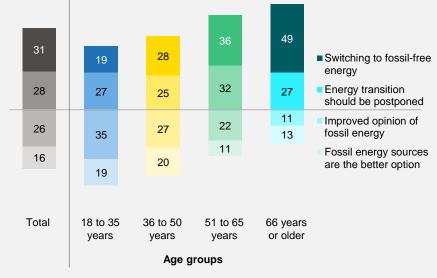
All respondents, in %

## The youngest age group is most likely to adapt behaviour to energy price variability; One third is favouring fossil-free energy irrespective of the crisis



Adjustment of behaviours to reduce energy costs

Attitude towards fossil-free energy All respondents, in %



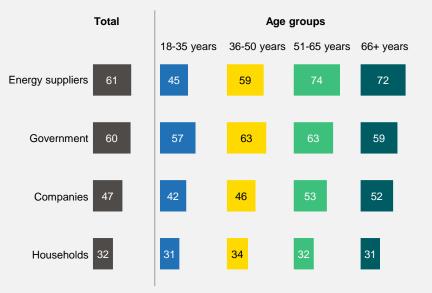
Question: F22 Given that there are times during the day where energy costs are lower: How often would you adjust your behavior to the electricity price to reduce energy costs? Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Source: Statista 2023 Question: F23 Which of the following statements applies best to you?; Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Source: Statista 2023





## Both energy suppliers and government are seen responsible to invest in fossil-free energy; The support for wind parks is high

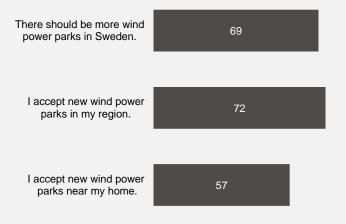
**Responsibility for investments in fossil-free energy** All respondents, in %



Question: F24 In your opinion: Who should invest more in fossil-free energy in the future?; Base: SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Multiple answers possible; Response option "None of the above" not displayed; Source: Statista 2023

#### Attitudes towards wind parks

All respondents, in % (scale 1="Strongly disagree" to 4="Strongly agree", top 2 values shown)



Question: F25 To what extent do you agree with the following statements about wind power parks?; Base: SWE W1 Total n=1,000, Source: Statista 2023

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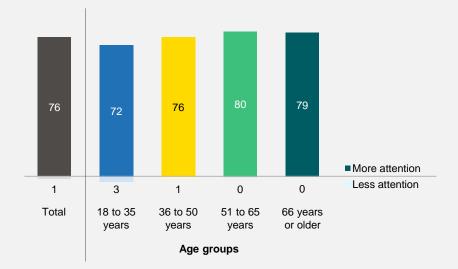
## Saving energy increased importance for 3 out of 4 consumers compared to the previous season; Topic has a high importance irrespective of age

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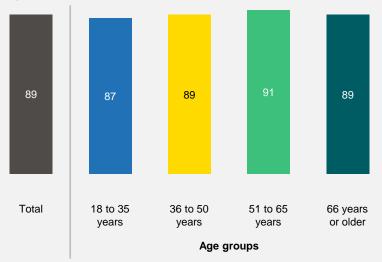
### Attention to energy saving since last season

All respondents, in %



#### **Relevance of lower energy consumption**

All respondents, in % (scale 1="Not relevant at all" to 4="Very relevant", top 2 values shown)



Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; Base: FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; Source: Statista 2023

Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; Base: FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; Response option "I pay the same attention" not displayed; Source: Statista 2023

## Limited heating is of low relevance, due to cold temperatures in finish winters – Less lighting is a more feasible action to save energy

#### Measures to reduce energy consumption

All respondents, in %

Total		Age groups						
		18 to 35 years	36 to 50 years	51 to 65 years	66 years or older			
Using less lights	80 14	71 22	83 13	87 8	83 <mark>11</mark>			
Cooking with lid	68 24	53 37	67 26	78 12	80 14			
Reduce shower time	68 19	54 31	69 17	78 12	76 13			
Using electric devices less	62 26	54 35	63 24	68 22	68 21			
Lower room temperature	61 24	53 33	59 25	69 15	66 <b>19</b>			
Reducing standby	58 33	54 35	55 36	63 28	61 32			
Using my car less often	58 20	50 27	57 18	60 19	69 <mark>10</mark>			
Washing clothes at max. 40°	53 27	47 34	60 21	53 25	54 27			
Heating most used rooms only	49 28	49 31	47 27	48 27	51 22			
Cooking one pot dishes	48 33	50 35	49 32	45 32	48 32			
Having colder showers	41 31	35 38	<mark>39</mark> 30	44 27	48 25			
Going to bed earlier	25 34	27 42	30 27	21 32	21 30			
Changing energy supplier	15 59	16 62	16 63	12 56	14 53			
Spending less time at home	14 25	22 31	<mark>12 26</mark>	10 19	9 21			

Do it already Open to do it in the future

Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; Base: FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; Source: Statista 2023

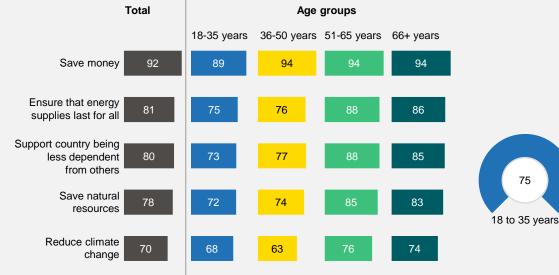


strongly", top 2 values shown)

Motivators to reduce energy consumption

All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me

## Saving money is the main motive for energy saving measures; Especially consumers between 18 and 35 years expect great effects



#### Expected savings from measures

75

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Respondents who reduce energy consumption, in % (scale 1="Very little" to 4="Very much". top 2 values shown)

Total

56

51 to 65 years

66 years or older

53

36 to 50 years

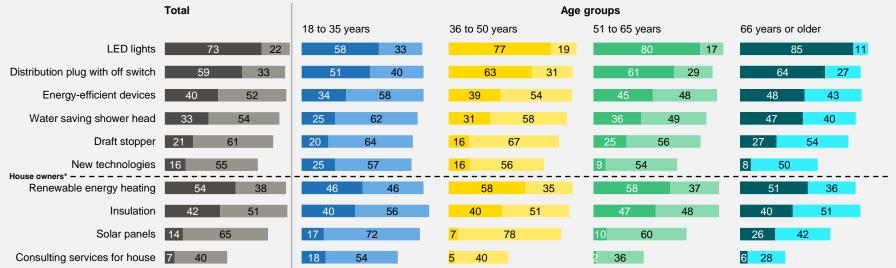
#### Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?: Base: FIN W1 Total n=958, 18-35 years n=291, 36-50 years n=245, 51-65 years n=268, 66+ years n=154; Source: Statista 2023

Age groups

Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: FIN W1 Total n=1.000. 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; Source: Statista 2023

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## There is high potential for future investments to save energy; The finish market for solar cells is not saturated – future demand can be expected



Investments to reduce energy consumption

All respondents, in %

Already invested Willingness for future investment

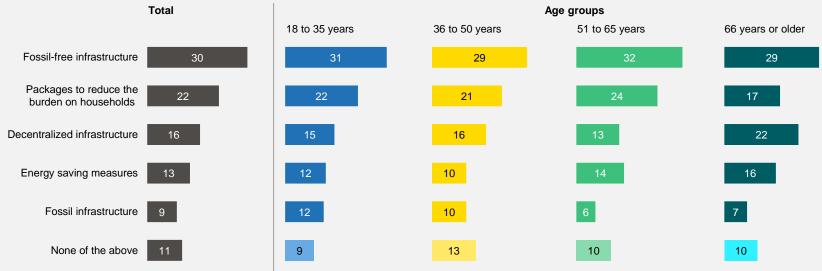
Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; Base: FIN W1 Total n=1,000, 18-35 years n=210, 36-50 years n=221, 51-65 years n=278, 66+ years n=161; \*respondents who are house owners: Total n=300, 18-35 years n=72, 36-50 years n=85, 51-65 years n=90, 66+ years n=53; Response option "I would never make investments in this area" not displayed; Source: Statista 2023



## In the long-term, Finns clearly prefer a fossil-free orientation of their government's energy policy

#### Preferred investment to reduce energy prices

All respondents, in %



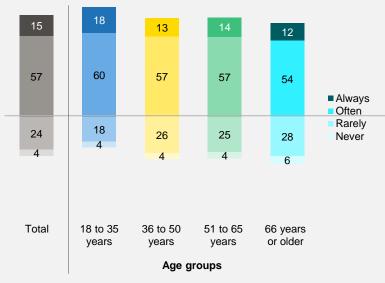
Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; Base: FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; Source: Statista 2023



### Country specifics

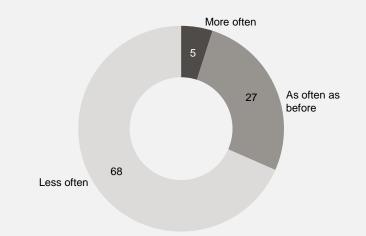
## 3 out of 4 people are willing to adjust their behaviour to electricity price fluctuations – esp. younger people; Energy prices affect sauna use

Adjustment of behaviours to reduce energy costs All respondents, in %



Question: F22 Given that there are times during the day where energy costs are lower: How often would you adjust your behavior to the electricity price to reduce energy costs? **Base:** FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; **Source**: Statista 2023

Change in sauna usage due to higher energy prices Respondents who have a sauna at home, in %



Question: F23 And how has the use of electricity heated saunas at your home (if you have one) changed due to higher energy prices?; Base: FIN W1 Total n=586, Source: Statista 2023

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### Country specifics

## In the short term, the energy crisis made consumers doubt about the unrestricted transition towards fossil-free energy sources

#### Attitude towards fossil-free energy

All respondents, in %



Question: F24 Which of the following statements applies best to you?; Base: FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; Source: Statista 2023



## **The Netherlands**







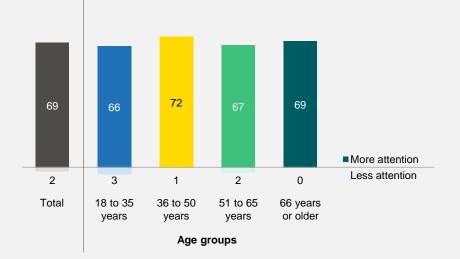
## The energy crisis has pushed Dutch consumers of all age groups to pay more attention to energy saving

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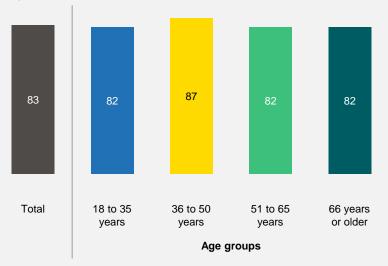
#### Attention to energy saving since last season

All respondents, in %



#### Relevance of lower energy consumption

All respondents, in % (scale 1="Not relevant at all" to 4="Very relevant", top 2 values shown)



Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; Base: NLD W1 Total n=1,000, 18-35 years n=289, 36-50 years n=268, 51-65 years n=255, 66+ years n=188; Source: Statista 2023

Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; Base: NLD W1 Total n=1,000, 18-35 years n=289, 36-50 years n=268, 51-65 years n=255, 66+ years n=188; Response option "I pay the same attention" not displayed; Source: Statista 2023



## A relatively mild winter enables Dutch to save on heating – Eight out of ten lower the room temperature and heat in most used rooms only

#### Measures to reduce energy consumption

All respondents, in %

То	tal				Age	groups			
		18 to 35 years		36 to 50 years	;	51 to 65 years		66 years or old	der
Heating most used rooms only	82 13	72	19	83	13	87	8	88	8
Lower room temperature	79 12	67	24	86	9	84	7	82	8
Using less lights	79 13	69	20	81	13	82	10	85	9
Cooking with lid	78 16	64	26	75	17	86	10	91	<mark>5</mark>
Reduce shower time	74 14	58	27	78	10	77	11	88	5
Washing clothes at max. 40°	69 19	57	29	72	18	76	14	74	14
Using my car less often	58 22	46 34		64	18	60	17	63	14
Reducing standby	56 33	48	43	62	26	61	29	53	31
Using electric devices less	53 28	41 37		57	26	57	22	60	24
Cooking one pot dishes	37 37	33 42		46	34	36 34		35 3	8
Having colder showers	31 27	26 36		35 24		28 25		36 22	
Going to bed earlier	31 30	27 39		32 33		29 23		37 21	
Spending less time at home	9 28	24 35		21 28		14 22		13 25	
Changing energy supplier 16	6 49	18 56		17 56		15 45	l i	13 36	

Do it already Open to do it in the future

Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; Base: NLD W1 Total n=1,000, 18-35 years n=289, 36-50 years n=268, 51-65 years n=255, 66+ years n=188; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; Source: Statista 2023



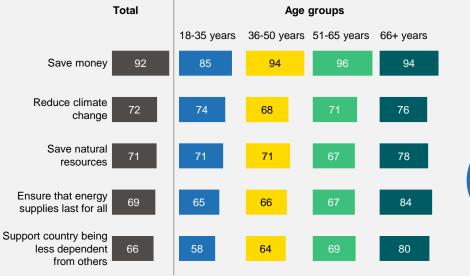
strongly", top 2 values shown)

Motivators to reduce energy consumption

All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me



## Economic reasons are the main drivers for energy saving, though ecological aspects also having a decisive role



#### Expected savings from measures

Respondents who reduce energy consumption, in % (scale 1="Very little" to 4="Very much", top 2 values shown)

Total

52

51 to 65 years

66 years or older

61

36 to 50 years

Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; Base: NLD W1 Total n=972, 18-35 years n=279, 36-50 years n=259, 51-65 years n=247, 66+ years n=187; Source: Statista 2023

Age groups

Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: NLD W1 Total n=1,000, 18-35 years n=289, 36-50 years n=268, 51-65 years n=255, 66+ years n=188; Source: Statista 2023

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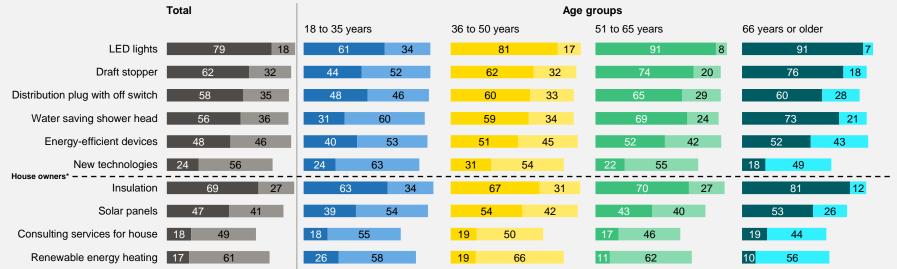


66

18 to 35 years



## Dutch population overall relies on numerous innovative technologies to lower energy consumption, yet are motivated for future investments



#### Investments to reduce energy consumption

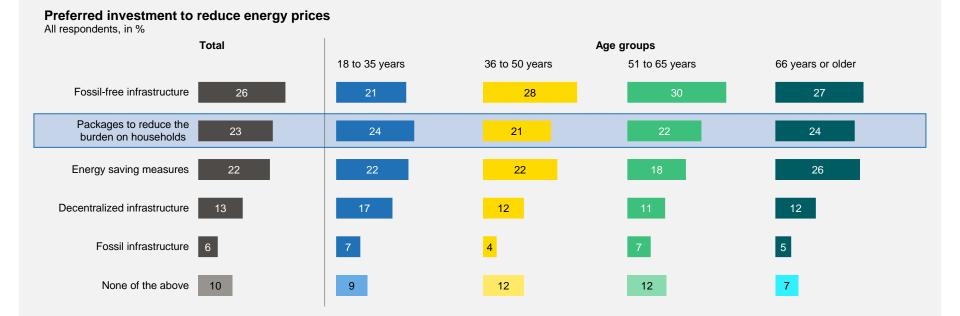
All respondents, in %

Already invested Willingness for future investment

Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; Base: NLD W1 Total n=1,000, 18-35 years n=289, 36-50 years n=268, 51-65 years n=255, 66+ years n=188; \*respondents who are house owners: Total n=504, 18-35 years n=122, 36-50 years n=154, 51-65 years n=138, 66+ years n=90; Response option "I would never make investments in this area" not displayed; Source: Statista 2023



## Next to investments in fossil-free infrastructure, almost one in four would like to have more packages by the government to reduce burden



Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; Base: NLD W1 Total n=1,000, 18-35 years n=289, 36-50 years n=268, 51-65 years n=255, 66+ years n=188; Source: Statista 2023



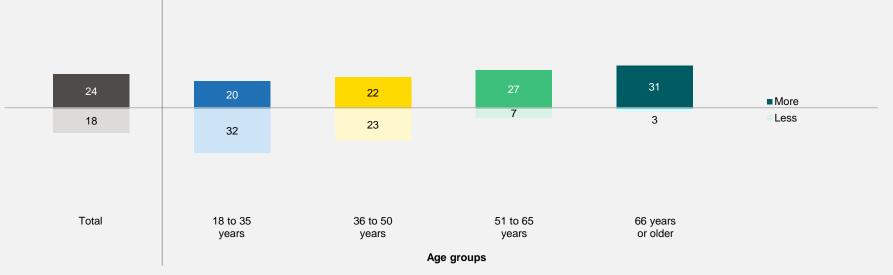




## Electric bike usage is only slightly affected by increased energy prices – Especially people over 50 years tend to use electric bikes more often

#### Change in electric bike usage

Respondents who own an eclectic bike, in %



Question: F24 Lastly, we want to get to know how the usage of electric bikes (if you own one) has changed because of the increased energy prices.; Base: NLD W1 Total n=396, 18-35 years n=112, 36-50 years n=107, 51-65 years n=99, 66+ years n=78; Response option "I ride my electric bike as often as before" not displayed; Source: Statista 2023





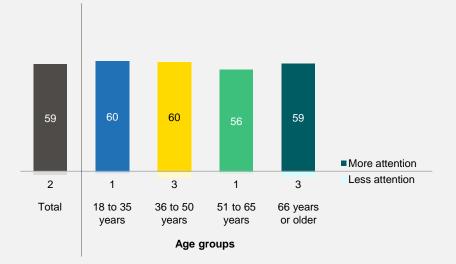




## For 40% of Germans, the energy crisis has no impact on attention to energy saving – The topic nevertheless has a high relevance

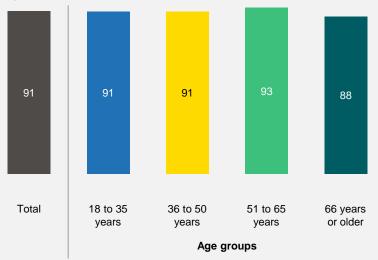
#### Attention to energy saving since last season

All respondents, in %



#### Relevance of lower energy consumption

All respondents, in % (scale 1="Not relevant at all" to 4="Very relevant", top 2 values shown)



Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; Source: Statista 2023

Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; Response option "I pay the same attention" not displayed; Source: Statista 2023



## The older people are, the more specific measures they take – Almost everyone older than 65 years cooks with lid, reduces heating and light

#### Measures to reduce energy consumption

All respondents, in %

Total		Age groups						
		18 to 35 years	36 to 50 years	51 to 65 years	66 years or older			
Cooking with lid	80 15	69 22	79 16	87 9	89 9			
Heating most used rooms only	77 16	72 22	78 16	79 13	<u>81</u> 10			
Lower room temperature	77 14	71 20	75 16	84 8	78 13			
Using less lights	76 16	68 24	78 13	81 12	82 11			
Reduce shower time	67 20	52 33	66 21	77 11	76 13			
Washing clothes at max. 40°	63 24	53 32	66 22	68 18	66 23			
Reducing standby	62 28	53 36	66 26	67 21	62 27			
Using my car less often	56 24	50 31	53 27	60 16	68 17			
Using electric devices less	51 29	42 34	56 28	54 25	53 28			
Cooking one pot dishes	39 36	44 37	41 39	39 34	23 34			
Having colder showers	32 27	31 29	29 30	32 24	36 23			
Going to bed earlier	24 30	26 37	27 31	22 25	19 22			
Changing energy supplier	21 48	23 57	21 52	19 41	20 39			
Spending less time at home	16 29	24 34	17 30	13 24	7 25			

Do it already Open to do it in the future

Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=297, 51-65 years n=290, 66+ years n=157; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; Source: Statista 2023



strongly", top 2 values shown)

Motivators to reduce energy consumption

All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me

## Money, money, money: The main driver for saving measure is not the conviction to save the environment but rather financial ones



#### Expected savings from measures

Respondents who reduce energy consumption, in % (scale 1="Very little" to 4="Very much", top 2 values shown)

Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; Source: Statista 2023

Age groups

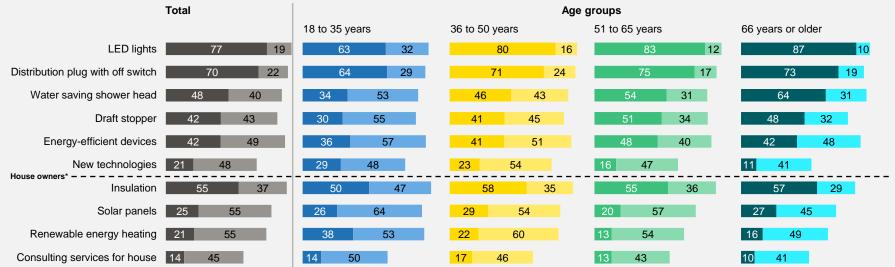
Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; Base: GER W1 Total n=960, 18-35 years n=281, 36-50 years n=249, 51-65 years n=280, 66+ years n=150; Source: Statista 2023

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### Energy saving

## The older people are the better households are equipped with energy saving features – among homeowners these differences disappear



#### Investments to reduce energy consumption

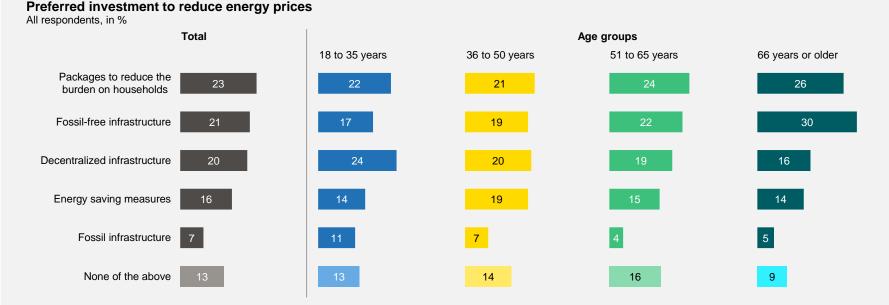
All respondents, in %

Already invested Willingness for future investment

Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=297, 51-65 years n=290, 66+ years n=157; \*respondents who are house owners: Total n=282, 18-35 years n=58, 36-50 years n=83, 51-65 years n=92, 66+ years n=49; Response option "I would never make investments in this area" not displayed; Source: Statista 2023



## To ease the financial burden, further measures by the government are preferred; Fossil-free and decentralized infrastructure are ranked 2<sup>nd</sup>

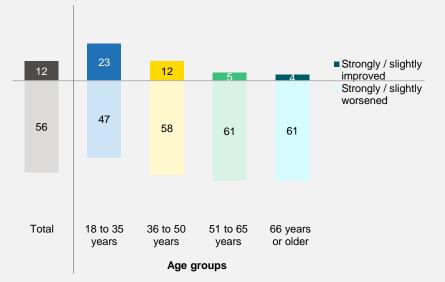


Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=290, 66+ years n=157; Source: Statista 2023



values shown)

### Due to the energy crisis the financial situation has worsened for more than half of the German population; Energy consulting is not established



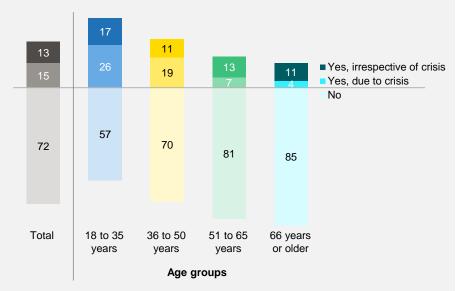
Change of financial situation due to energy crisis

All respondents, in % (scale 1="Strongly worsened" to 5="Strongly improved". top 2

Question: F22 To what extent has your financial situation changed due to the energy crisis?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; Response option "unchanged" not displayed; Source: Statista 2023

Question: F23 Have you ever made use of an energy consulting?; Base: GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; Source: Statista 2023

Usage of energy consulting All respondents, in %



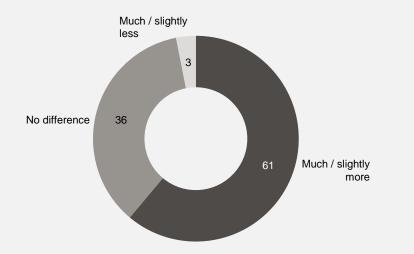




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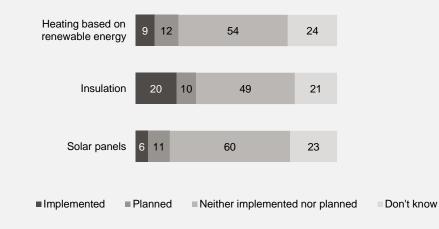
# While eco-friendly behavior is on the rise, landlords have so far been exempted – Rented apartments with only few energy refurbishments

Change in eco-friendly behaviour due to energy crisis  $\mbox{All respondents, in }\%$ 



Energy refurbishments by landlord

Respondents who are tenants, in %



Question: F24 To what extent have you adjusted your behaviour due to the increased relevance and reporting on climate change?; Base: GER W1 Total n=1,000; Source: Statista 2023

Question: F25 Which of the following energy refurbishments has your property management / landlord undertaken in order to reduce the energy consumption?; Base: GER W1 Total n=606; Source: Statista 2023

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### Energy saving

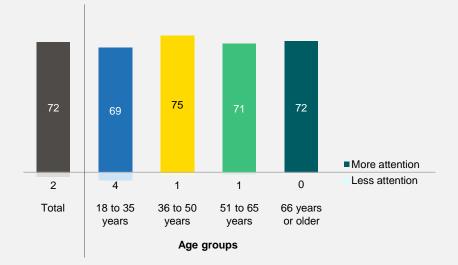
## French are highly involved when it comes to energy consumption – Relevance to save energy and attention is high for all age groups

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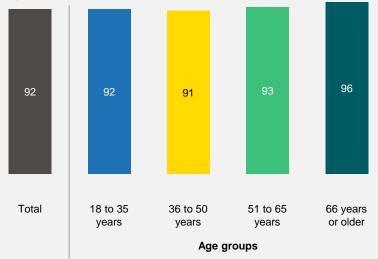
### Attention to energy saving since last season

All respondents, in %



#### Relevance of lower energy consumption

All respondents, in % (scale 1="Not relevant at all" to 4="Very relevant", top 2 values shown)



Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Source: Statista 2023

Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Response option "I pay the same attention" not displayed; Source: Statista 2023

### Energy saving

## Less light, shorter showers, colder rooms: French apply various ways to save energy – especially people above 50 years

### Measures to reduce energy consumption

All respondents, in %

Total		Age groups			
		18 to 35 years	36 to 50 years	51 to 65 years	66 years or older
Using less lights	81 13	68 21	83 13	89 6	93 <mark>4</mark>
Cooking with lid	79 15	64 26	78 16	92 6	92 5
Lower room temperature	77 13	67 20	80 12	84 10	83 <mark>6</mark>
Reduce shower time	76 15	65 23	76 14	85 9	84 7
Washing clothes at max. 40°	76 15	64 22	79 14	85 10	79 14
Heating most used rooms only	74 16	65 24	76 15	79 12	84 7
Using electric devices less	62 24	52 31	64 21	68 20	73 18
Reducing standby	61 29	53 36	60 30	69 21	68 <b>28</b>
Using my car less often	61 20	53 27	56 17	70 13	71 21
Cooking one pot dishes	54 28	51 31	<b>52</b> 30	60 23	55 25
Going to bed earlier	34 28	41 33	32 27	31 26	30 25
Having colder showers	31 26	30 29	30 27	33 22	31 26
Spending less time at home	24 27	34 32	22 28	22 22	9 25
Changing energy supplier	17 38	18 44	19 38	16 38	11 24

Do it already Open to do it in the future

Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; Source: Statista 2023

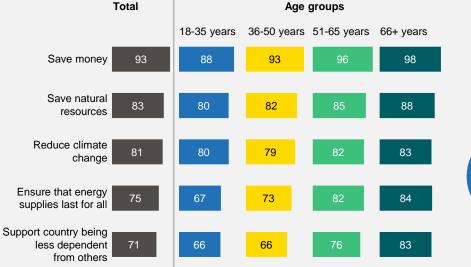


strongly", top 2 values shown)

Motivators to reduce energy consumption

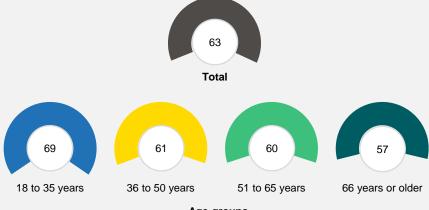
All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me

## Economic reasons are the main drivers for energy saving, but ecological aspects also play a decisive role



### Expected savings from measures

Respondents who reduce energy consumption, in % (scale 1="Very little" to 4="Very much", top 2 values shown)



Age groups

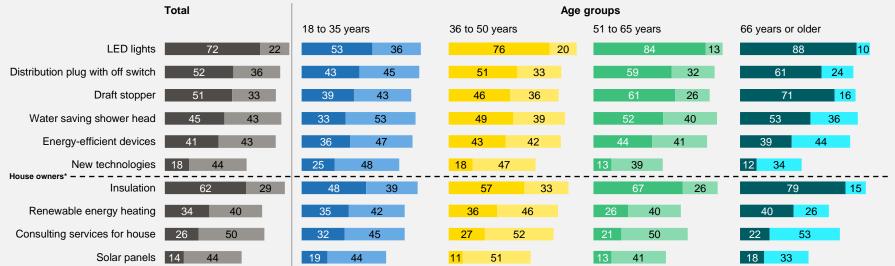
Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; Base: FRA W1 Total n=970, 18-35 years n=308, 36-50 years n=281, 51-65 years n=262, 66+ years n=119; Source: Statista 2023

Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Source: Statista 2023

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## Reticence to invest in energy saving measures, but there is potential – French older than 65 years spent most frequently



#### Investments to reduce energy consumption

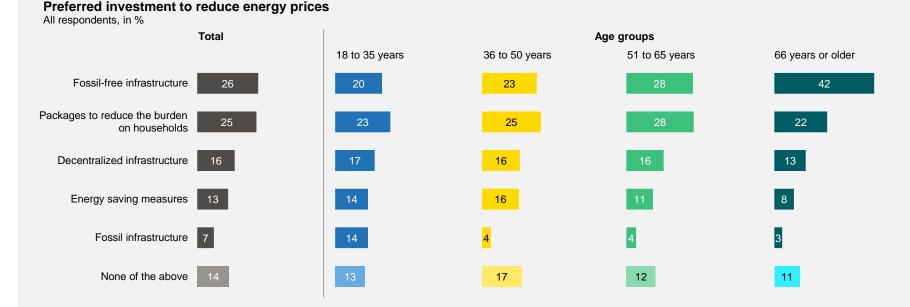
All respondents, in %

Already invested Willingness for future investment

Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; \*respondents who are house owners: Total n=450, 18-35 years n=93, 36-50 years n=151, 51-65 years n=134, 66+ years n=72; Response option "I would never make investments in this area" not displayed; Source: Statista 2023

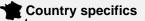


# Next to investments in fossil-free infrastructure, one out of four would like to receive more government support in the form of packages



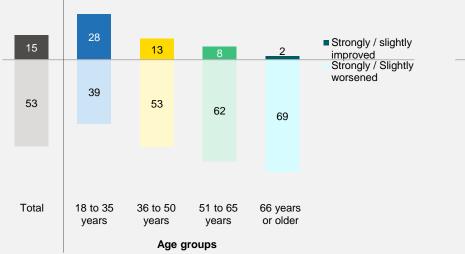
Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Source: Statista 2023



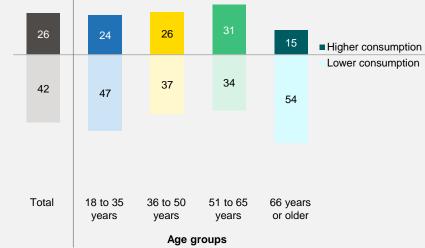


## The general tension in France has its origin in the deterioration of the financial situation of half of the population which worsens with age

Change of financial situation due to energy crisis All respondents, in %



Change in energy consumption due to working from home Respondents in whose household at least one person works from home, in %

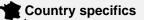


Question: F24 To what extent has your financial situation changed due to the energy crisis?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Response option "unchanged" not displayed; Source: Statista 2023

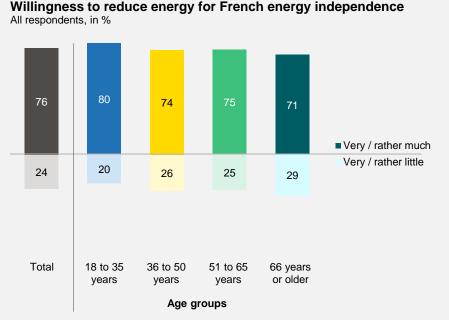
Question: F25 And how has your energy consumption changed due to working from home (if you do so)?; Base: FRA W1 Total n=591, 18-35 years n=246, 36-50 years n=186, 51-65 years n=120, 66+ years n=39; Response option "I have not noticed a change" not displayed; Source: Statista 2023



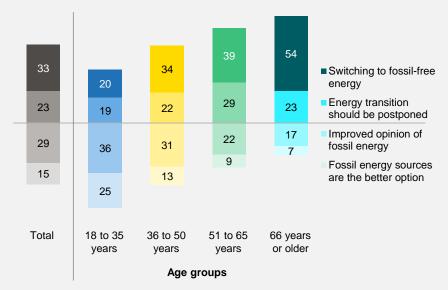




### 3 out of 4 people want to contribute to French energy independence; Consumers older than 50 years clearly in favour for fossil-free energy



Attitude towards fossil-free energy All respondents, in %



Question: F22 To what extent are you willing to make additional efforts to reduce your energy consumption to contribute to the French energy independence?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Source: Statista 2023

Question: F23 Which of the following statements applies best to you?; Base: FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Source: Statista 2023



