

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
 -  **Sample**
 - 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 13th - January 23rd 2023

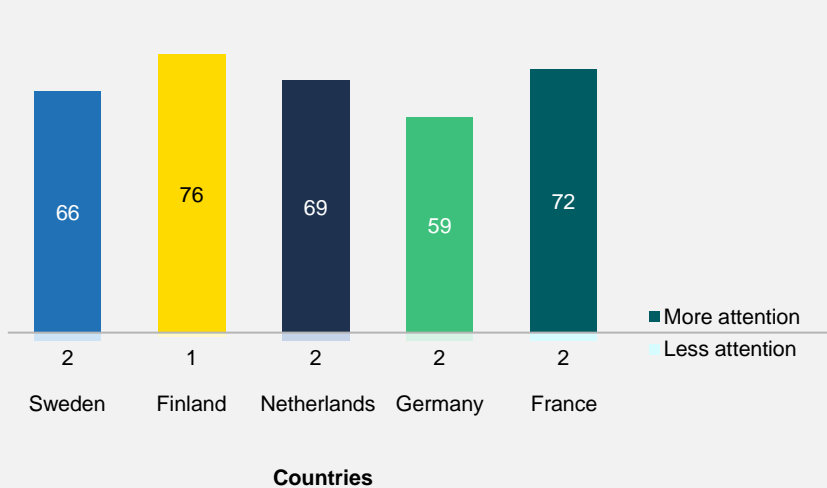
Country comparison



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

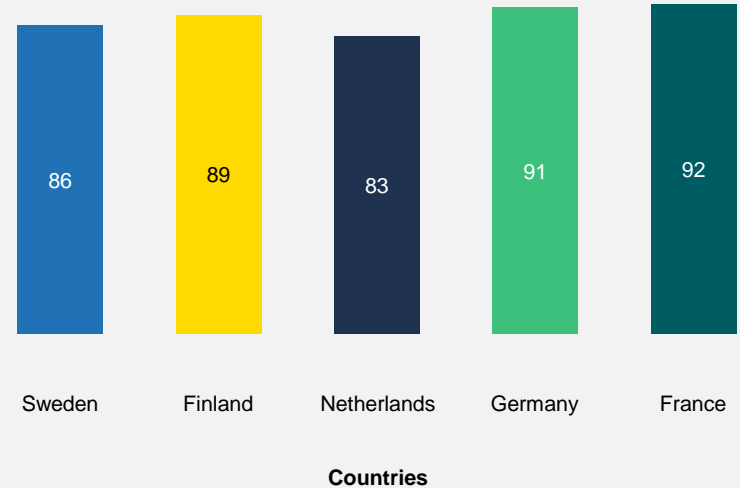
Attention to energy saving since last season

All respondents, in %



Relevance of lower energy consumption

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



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

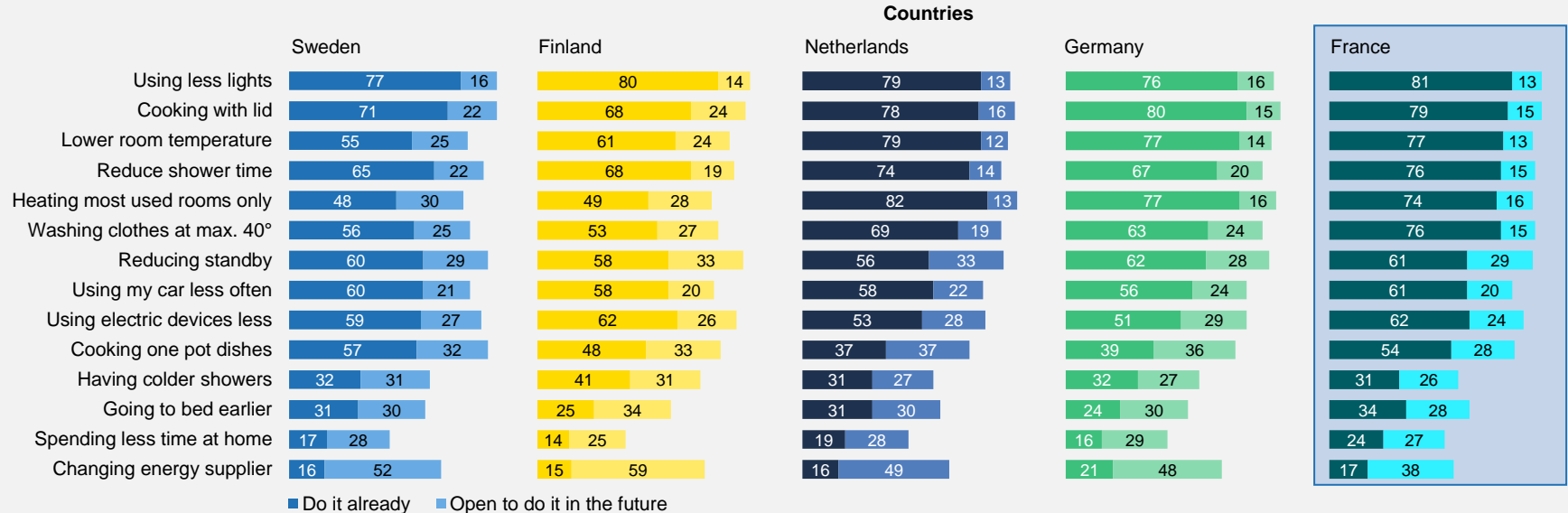
Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; **Base:** SWE / FIN / NLD / GER / FRA W1 Total n=1,000; **Source:** Statista 2023



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

Measures to reduce energy consumption

All respondents, in %



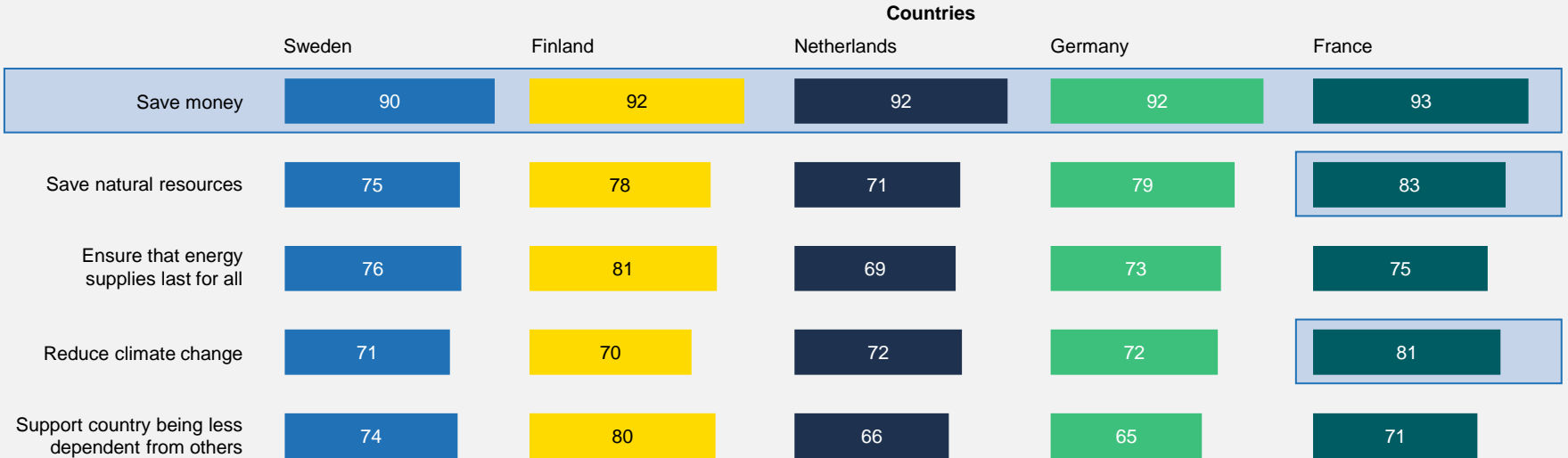
Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; **Base:** SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; **Source:** Statista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



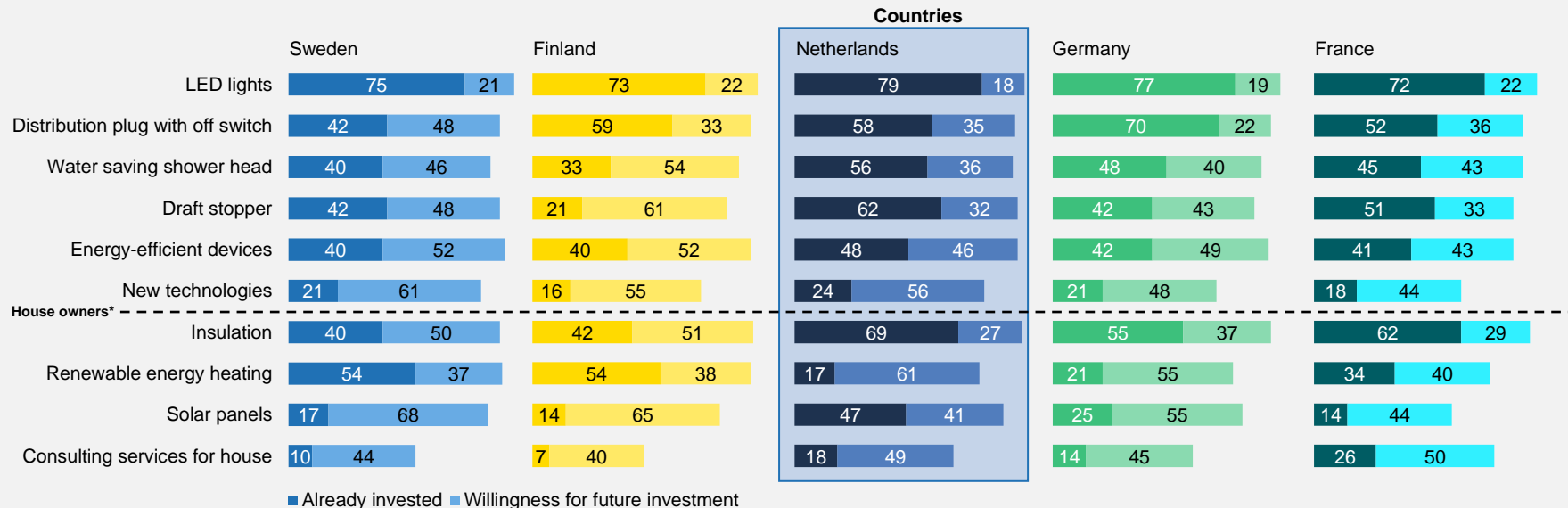
Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Source: Statista 2023



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 %



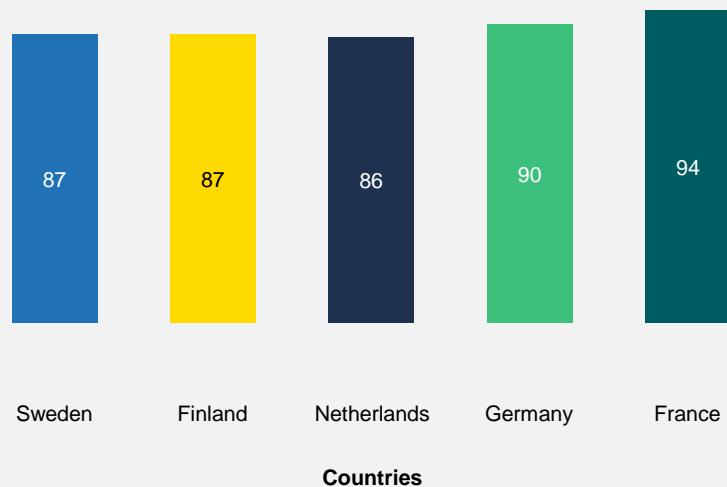
Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; **Base:** SWE / FIN / NLD / GER / FRA W1 Total n=1,000; *respondents who are house owners: SWE Total n=315, FIN Total n=300, NLD Total n=504, DEU Total n=282, FRA Total n=450; Response option "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 worsen while Dutch and Finns are more optimistic

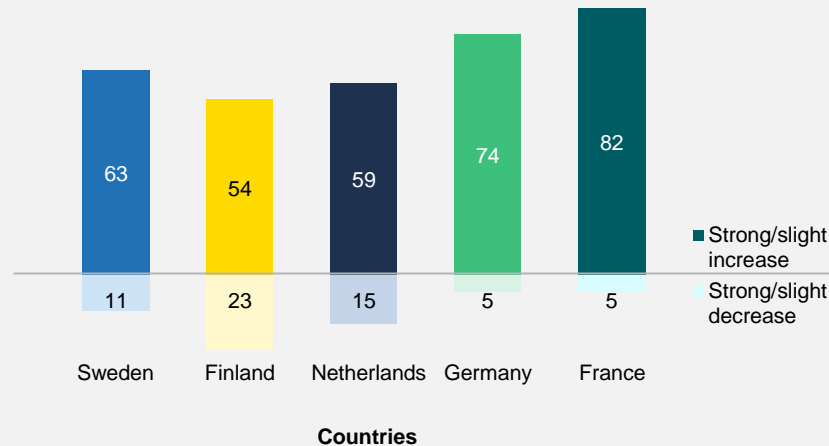
Concern regarding energy prices

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

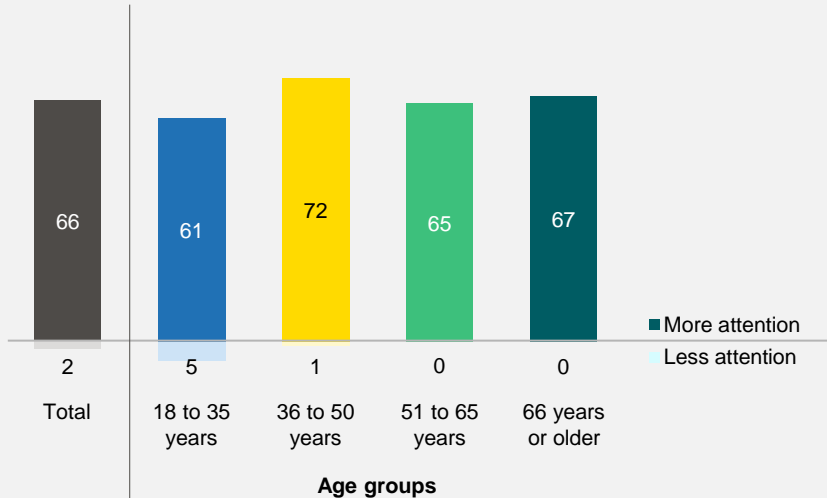
Question: F12 How will energy prices develop in the next year according to your opinion?; Base: SWE / FIN / NLD / GER / FRA W1 Total n=1,000; Source: Statista 2023

Sweden

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

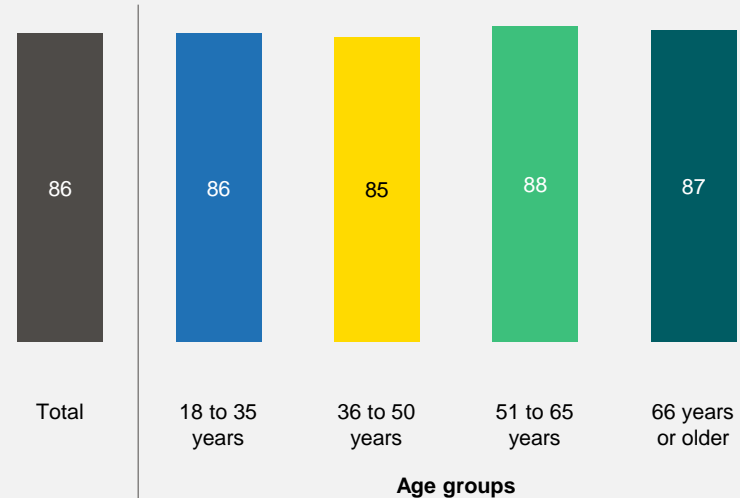
Attention to energy saving since last season

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)



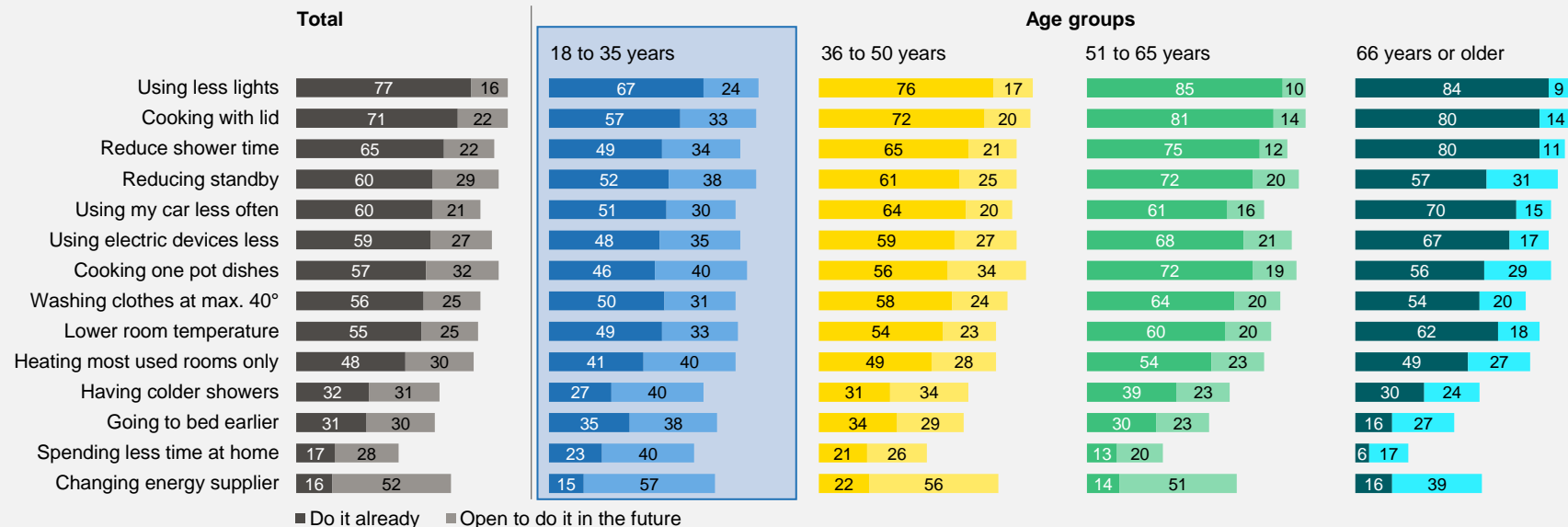
Question: F4 How much attention do you pay to the topic of energy saving in your everyday life compared to last season?; **Base:** SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Response option "I pay the same attention" not displayed; **Source:** Statista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

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

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 %

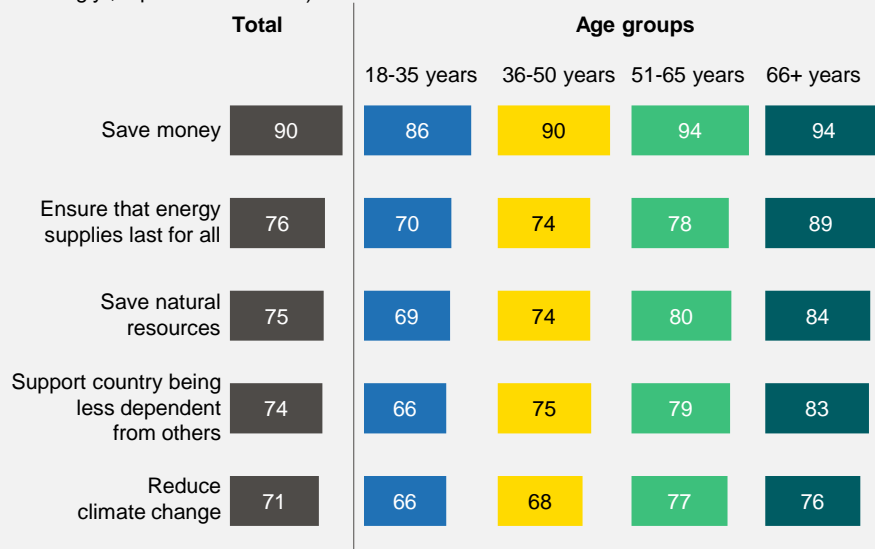


Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; **Base:** SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; Response option "I do not do it and I am not open to reduce my energy consumption this way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

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

Motivators to reduce energy consumption

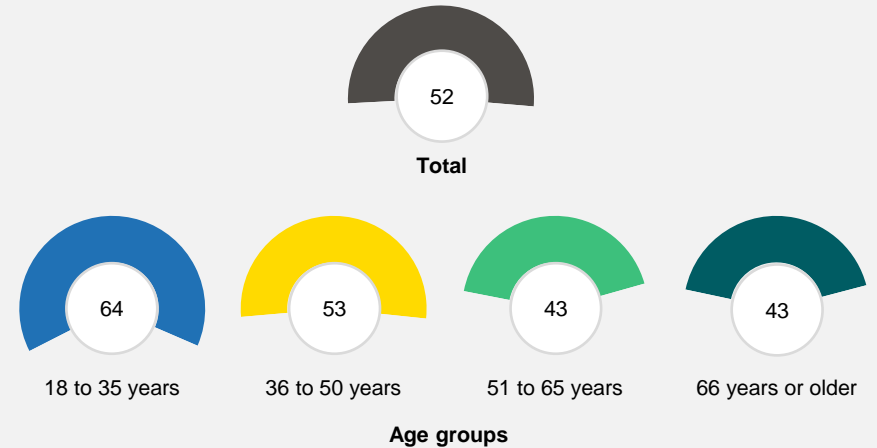
All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me strongly", top 2 values shown)



Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; **Base:** SWE 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

Expected savings from measures

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

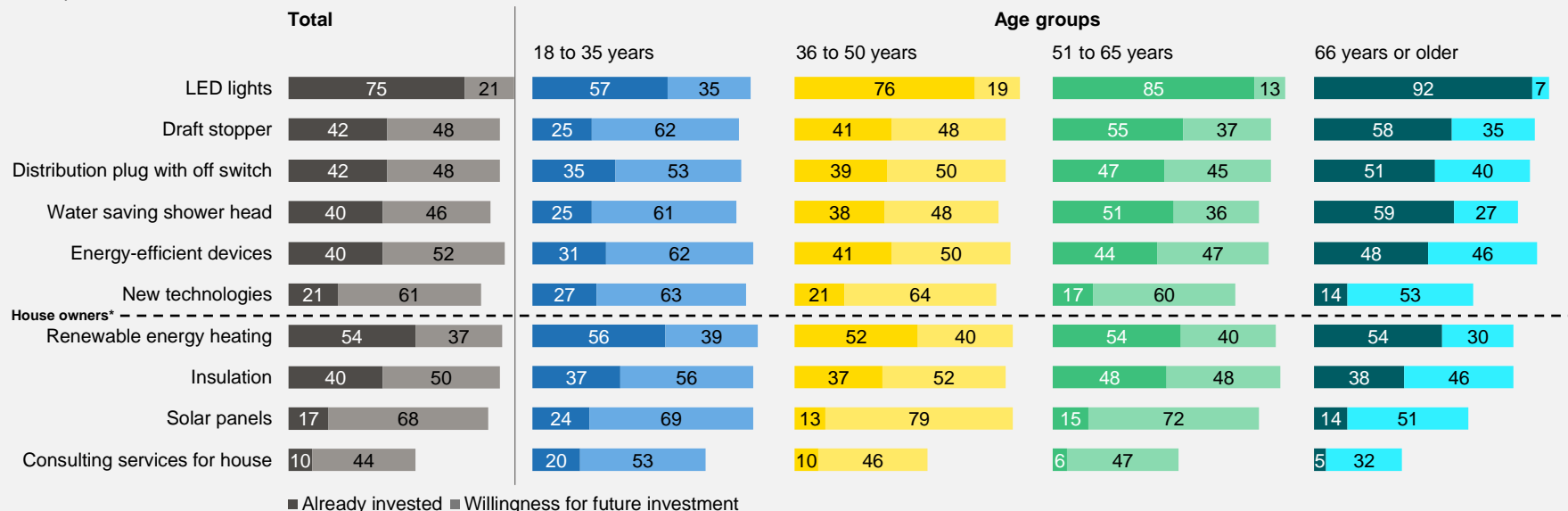


Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; **Base:** SWE W1 Total n=960, 18-35 years n=311, 36-50 years n=245, 51-65 years n=249, 66+ years n=155; **Source:** Statista 2023

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 %

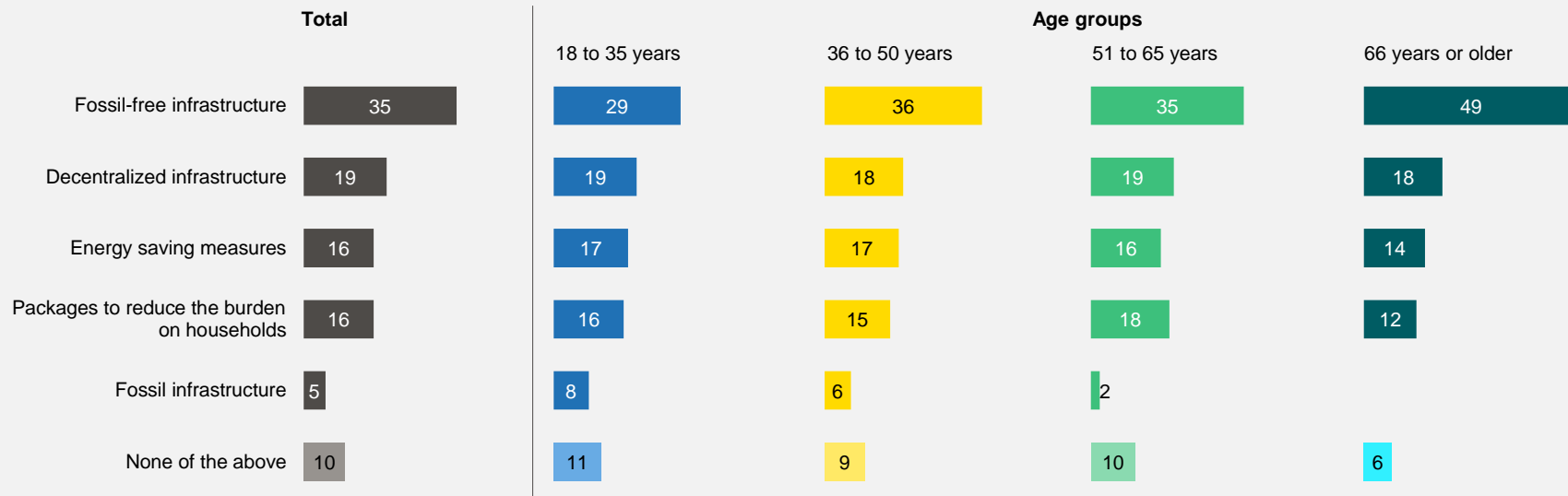


Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; **Base:** GER W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; *respondents who are house owners: Total n=315, 18-35 years n=70, 36-50 years n=84, 51-65 years n=85, 66+ 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

Preferred investment to reduce energy prices

All respondents, in %



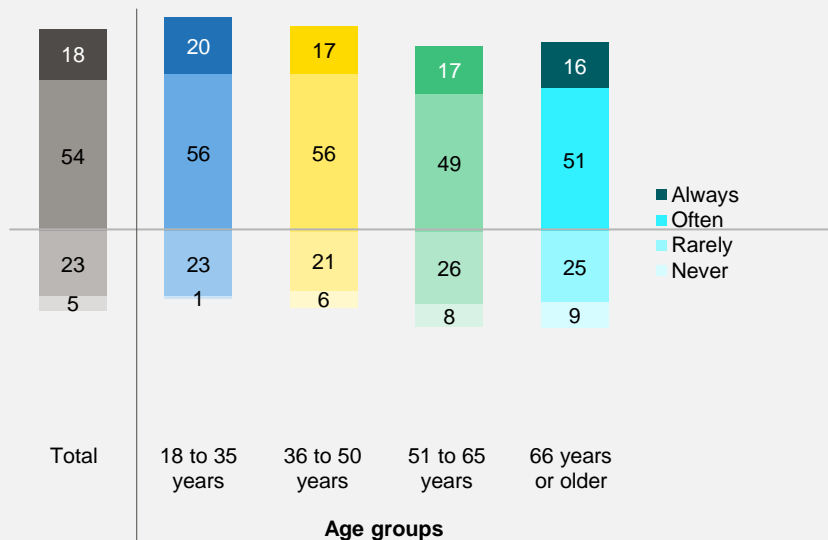
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Country specifics

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

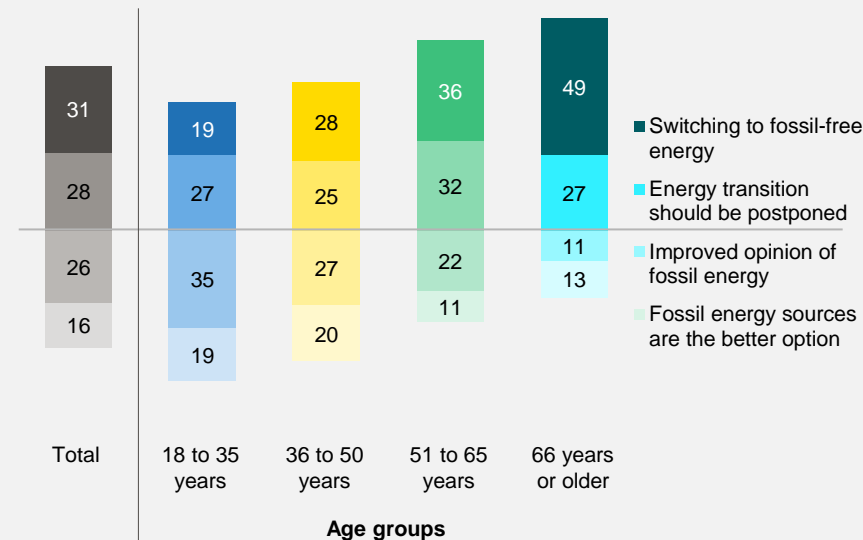
All respondents, in %



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

Attitude towards fossil-free energy

All respondents, in %



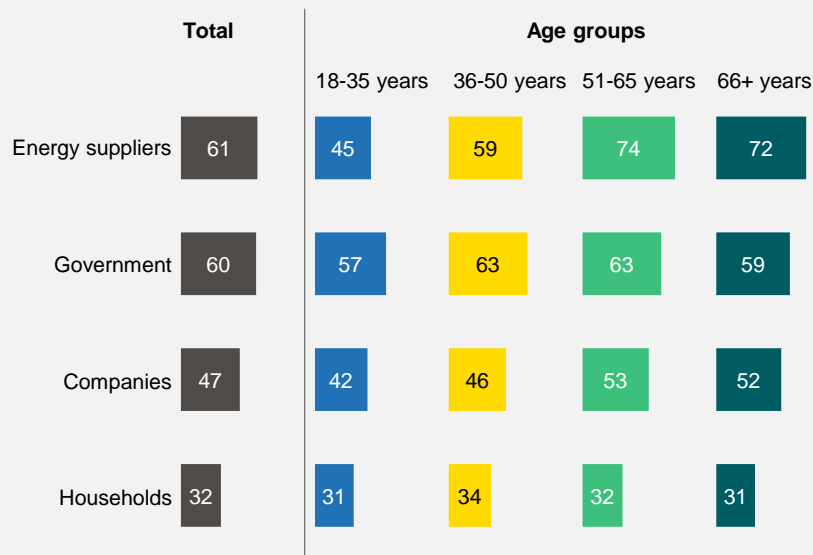
Question: F23 Which of the following statements applies best to you? **Base:** SWE W1 Total n=1,000, 18-35 years n=324, 36-50 years n=261, 51-65 years n=257, 66+ years n=158; **Source:** Statista 2023

Country specifics

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)

There should be more wind power parks in Sweden.

69

I accept new wind power parks in my region.

72

I accept new wind power parks near my home.

57

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

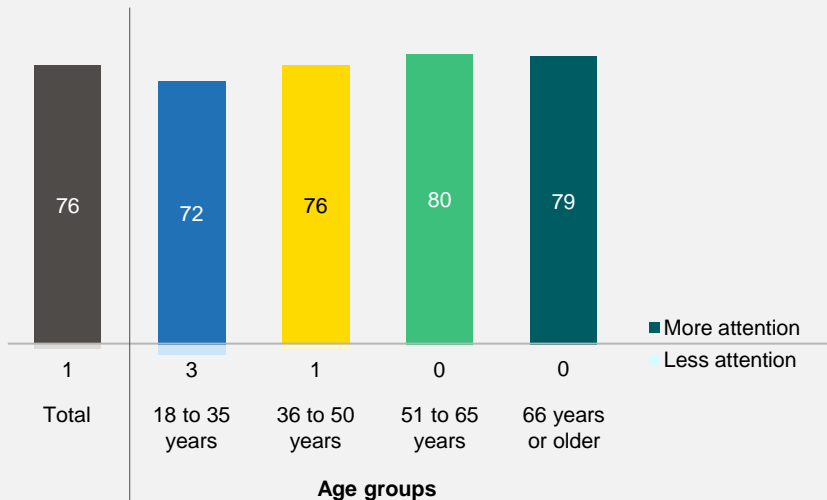
Finland



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

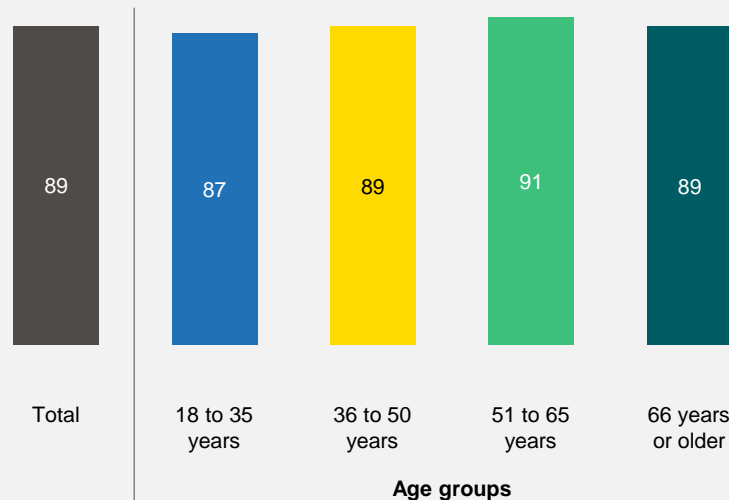
Attention to energy saving since last season

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: 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

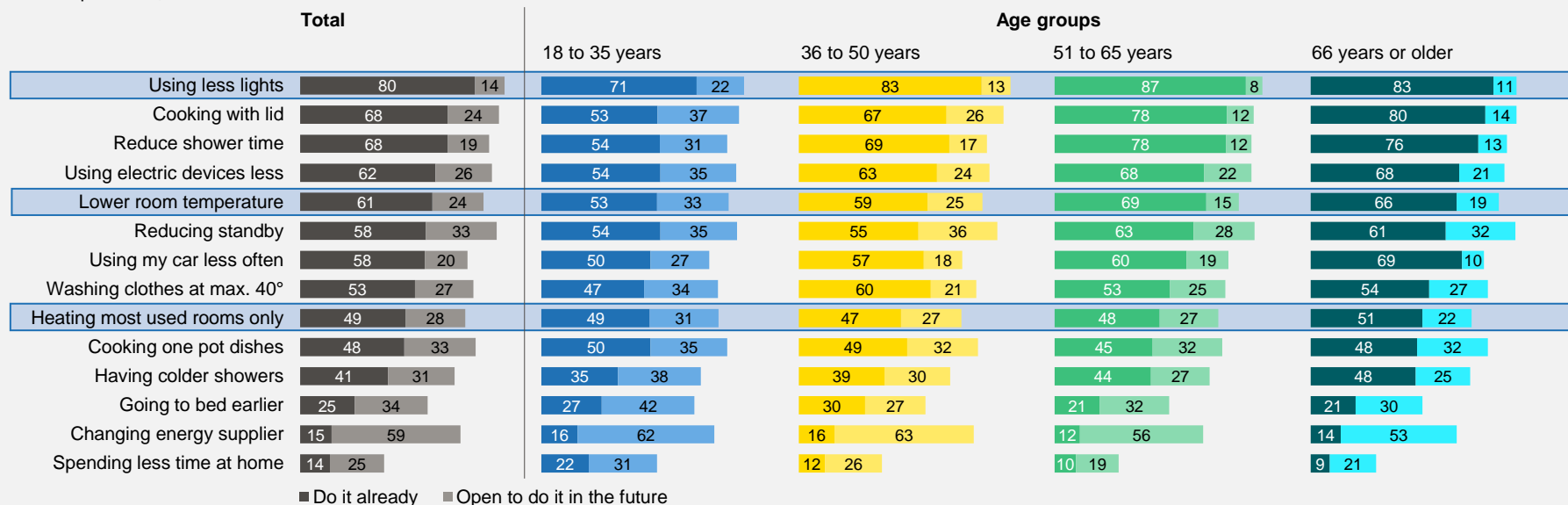
Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; **Base:** FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; **Source:** Statista 2023



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 %



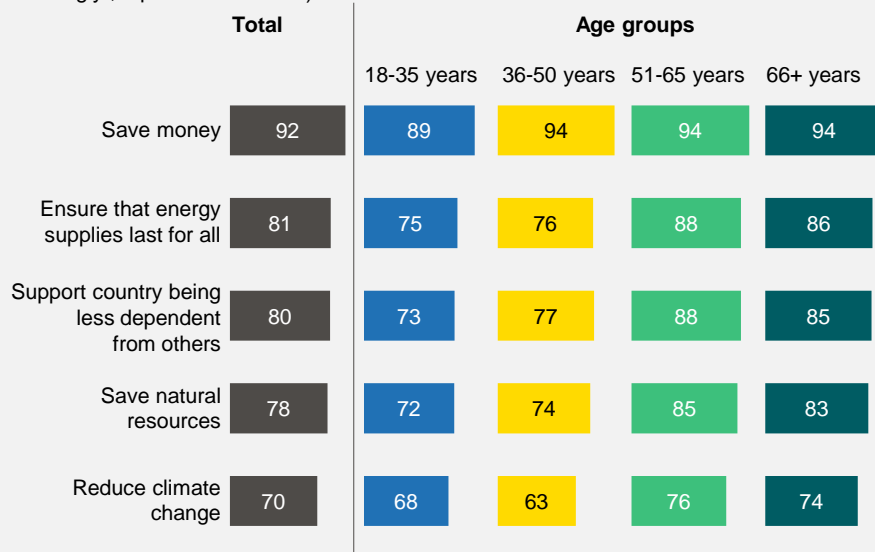
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Saving money is the main motive for energy saving measures; Especially consumers between 18 and 35 years expect great effects

Motivators to reduce energy consumption

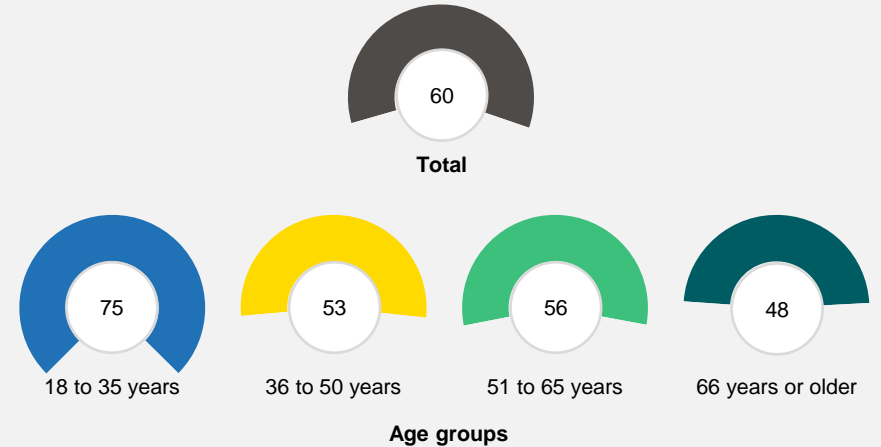
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Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; **Base:** FIN W1 Total n=1,000, 18-35 years n=310, 36-50 years n=251, 51-65 years n=278, 66+ years n=161; **Source:** Statista 2023

Expected savings from measures

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



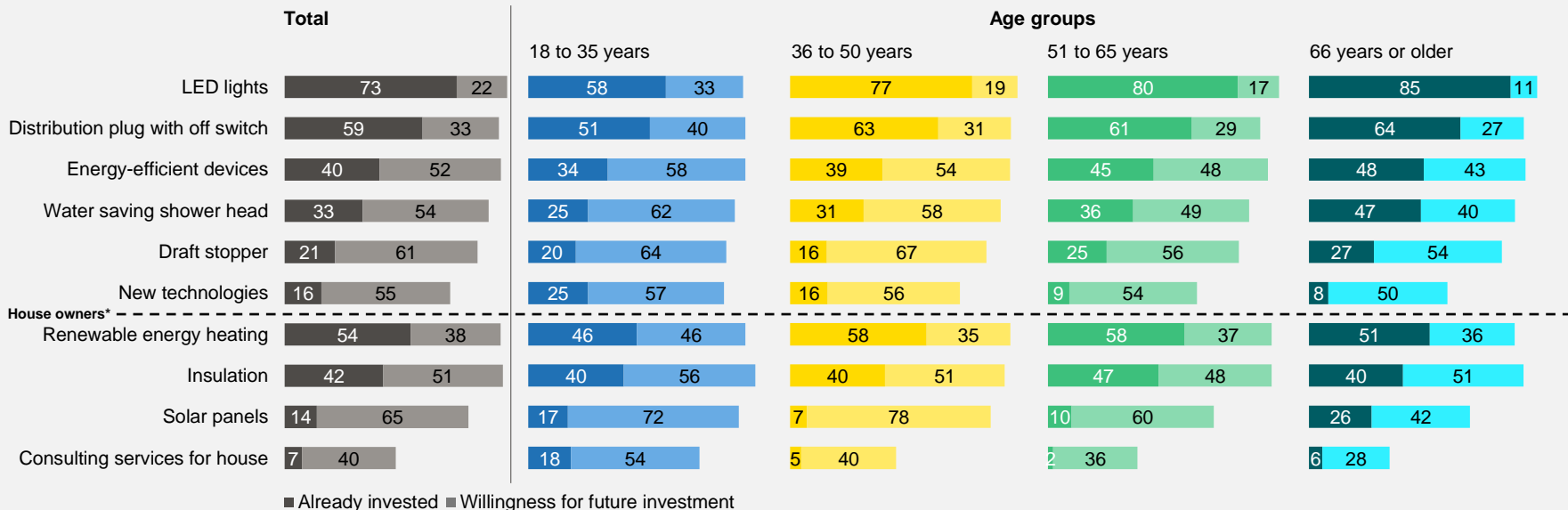
Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; **Base:** FIN W1 Total n=958, 18-35 years n=291, 36-50 years n=245, 51-65 years n=268, 66+ years n=154; **Source:** Statista 2023



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 %



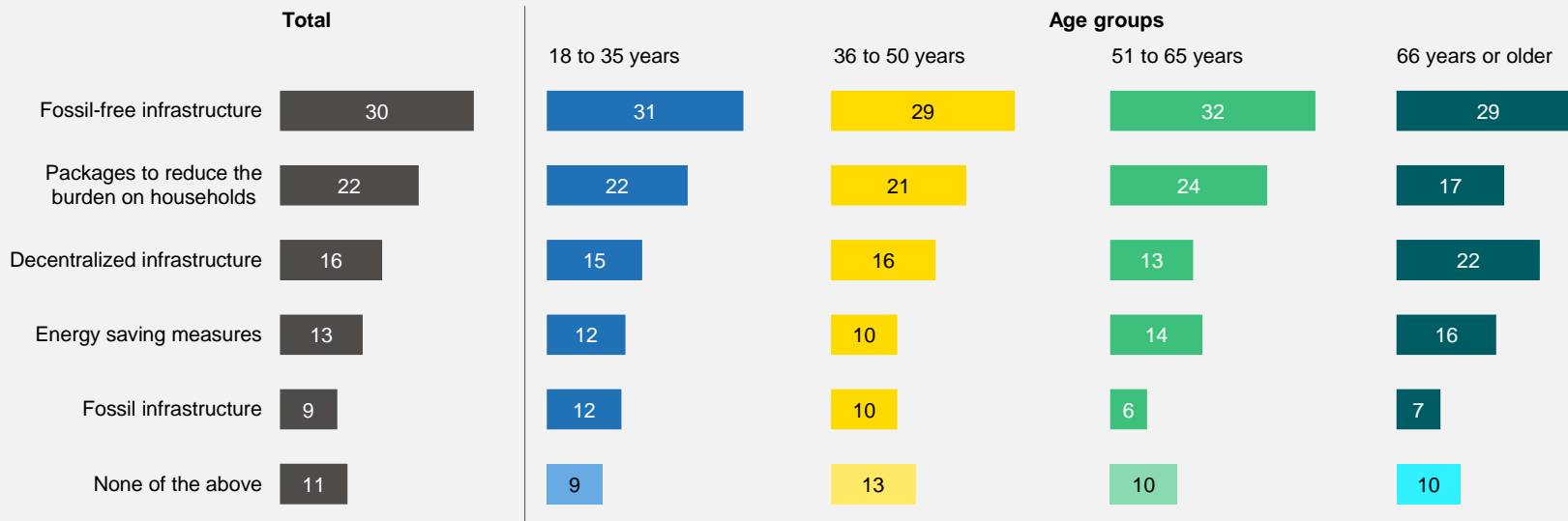
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In the long-term, Finns clearly prefer a fossil-free orientation of their government's energy policy

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



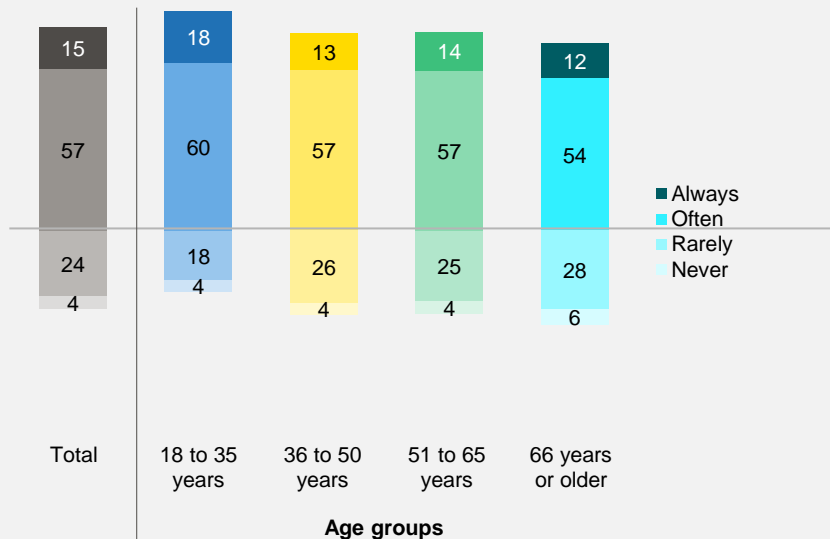
Country specifics



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

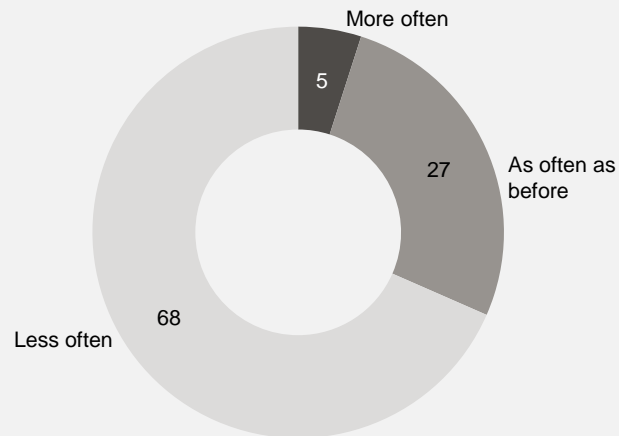
All respondents, in %



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 %



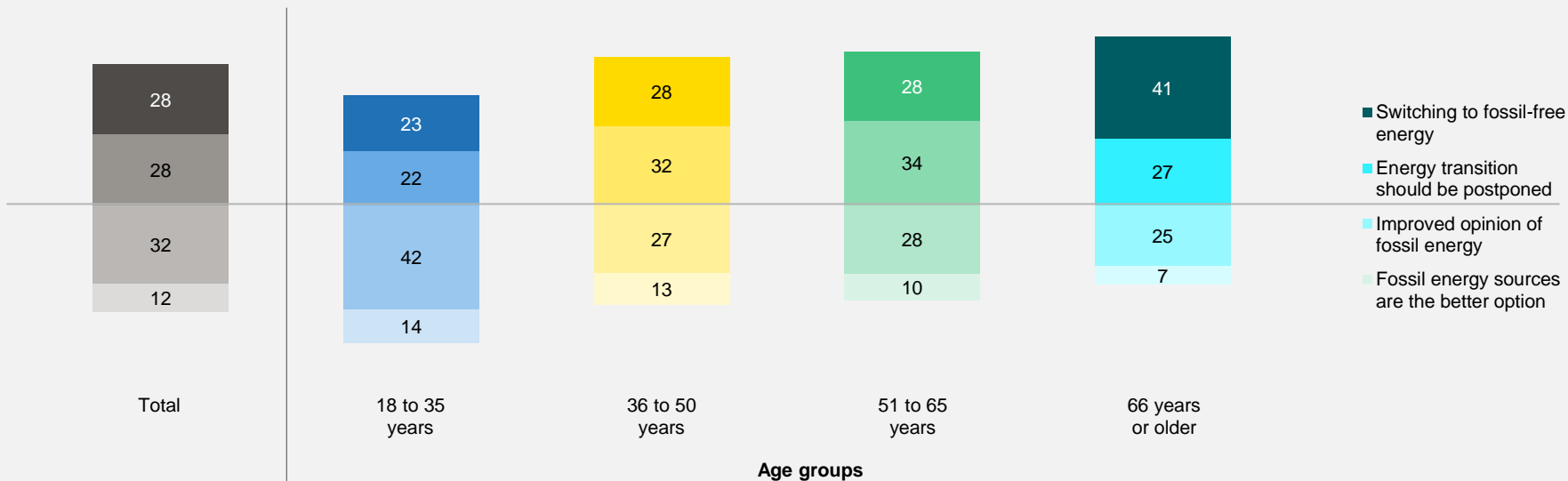
Question: F23 And how has the use of electricity heated saunas at your home (if you have one) changed due to higher energy prices?; **Base:** FIN W1 Total n=586, **Source:** Statista 2023



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

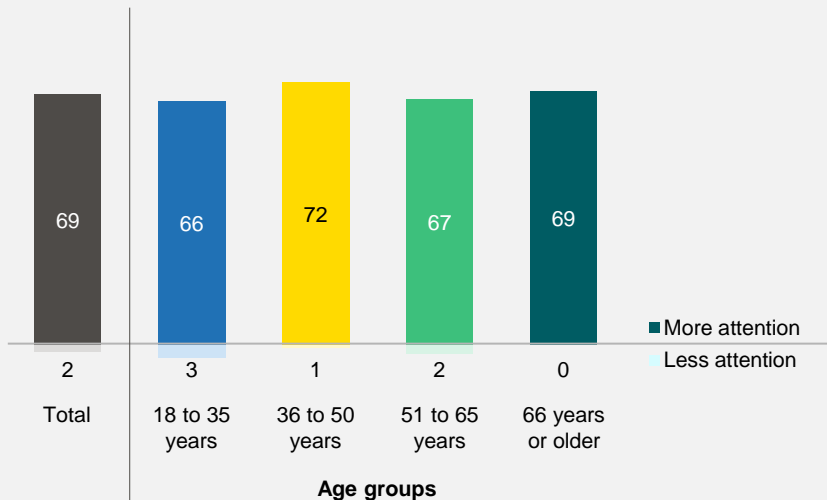
The Netherlands



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

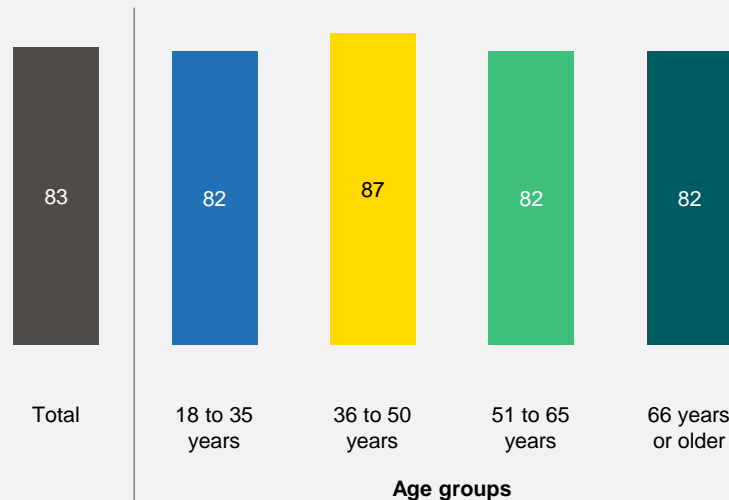
Attention to energy saving since last season

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: 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

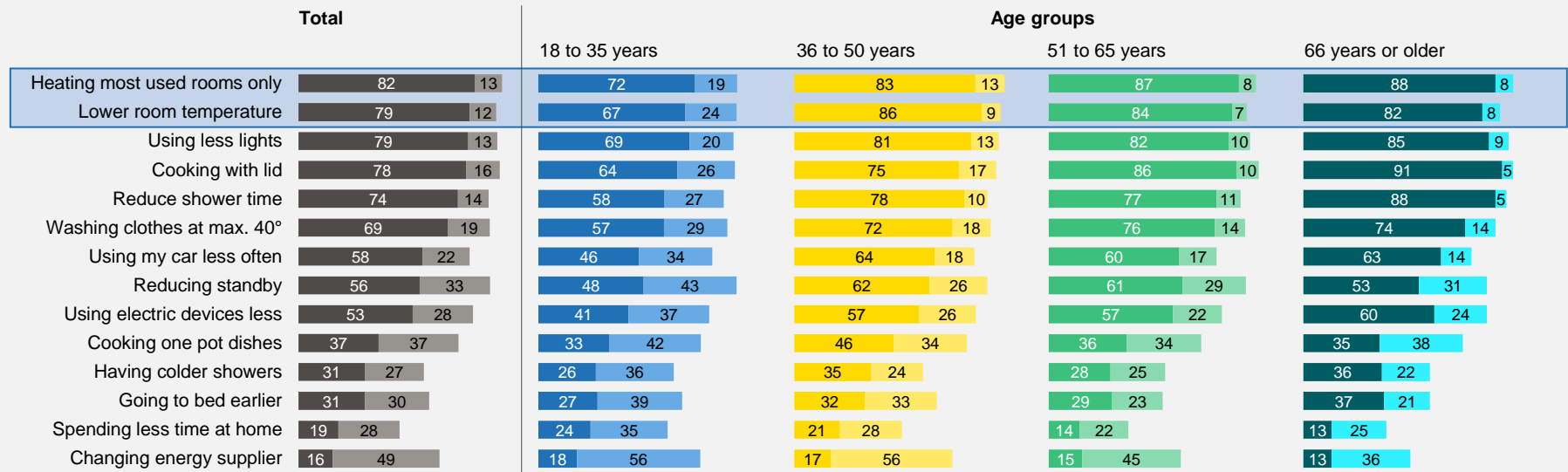
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A relatively mild winter enables Dutch to save on heating – Eight out of ten lower the room temperature and heat in most used rooms only

Measures to reduce energy consumption

All respondents, in %



■ Do it already ■ Open to do it in the future

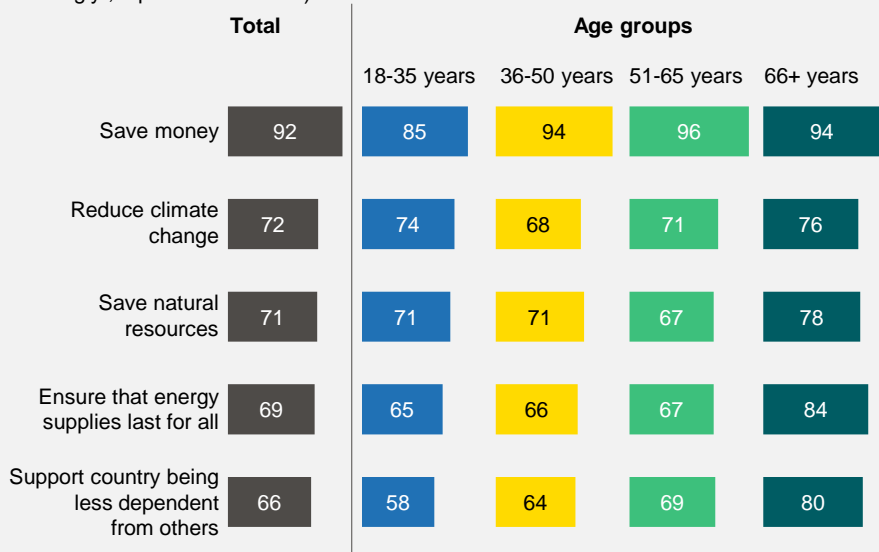
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Economic reasons are the main drivers for energy saving, though ecological aspects also having a decisive role

Motivators to reduce energy consumption

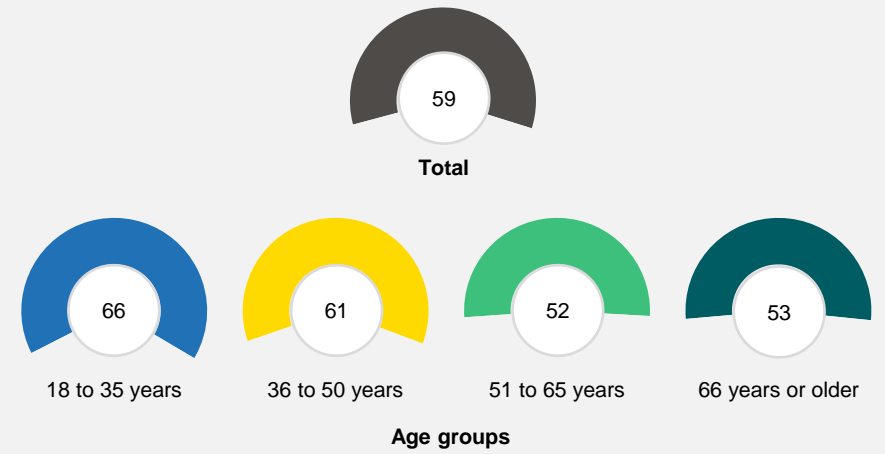
All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me strongly", top 2 values shown)



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Expected savings from measures

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



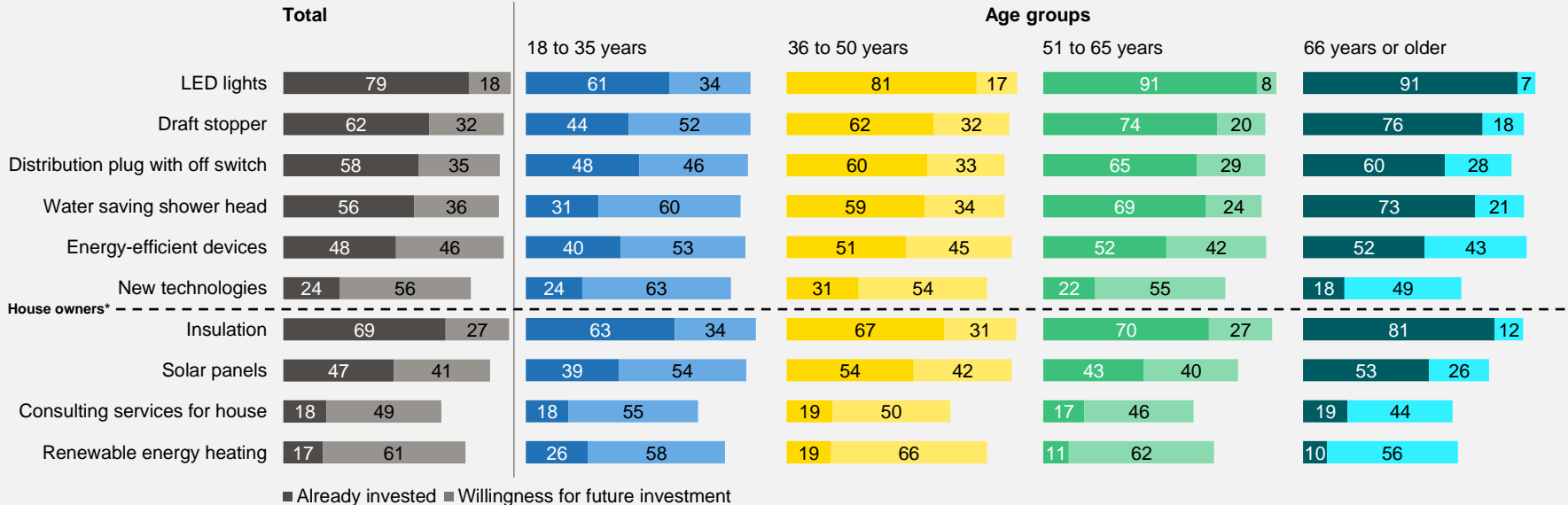
Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; **Base:** NLD W1 Total n=972, 18-35 years n=279, 36-50 years n=259, 51-65 years n=247, 66+ years n=187; **Source:** Statista 2023



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 %



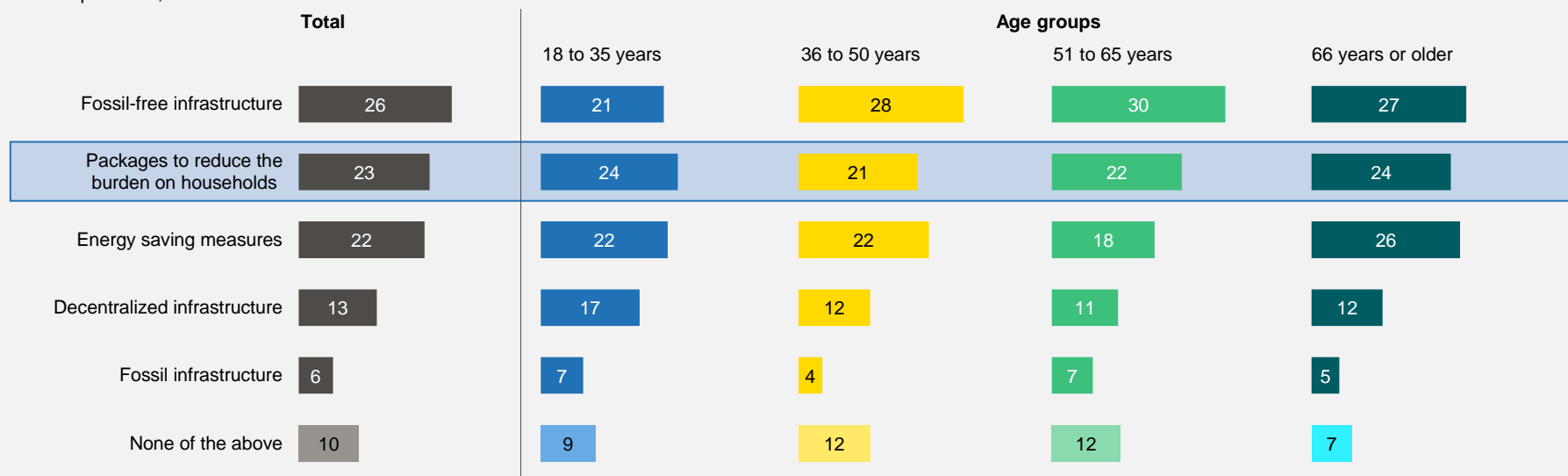
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Next to investments in fossil-free infrastructure, almost one in four would like to have more packages by the government to reduce burden

Preferred investment to reduce energy prices

All respondents, in %



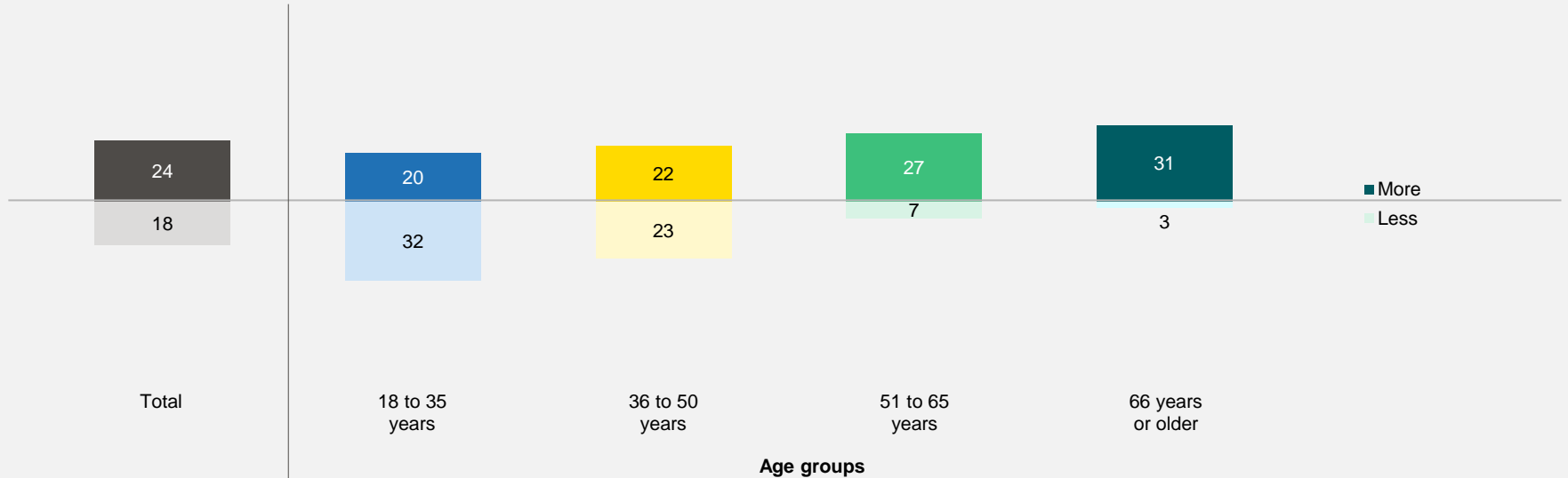
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Electric bike usage is only slightly affected by increased energy prices – Especially people over 50 years tend to use electric bikes more often

Change in electric bike usage

Respondents who own an electric 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

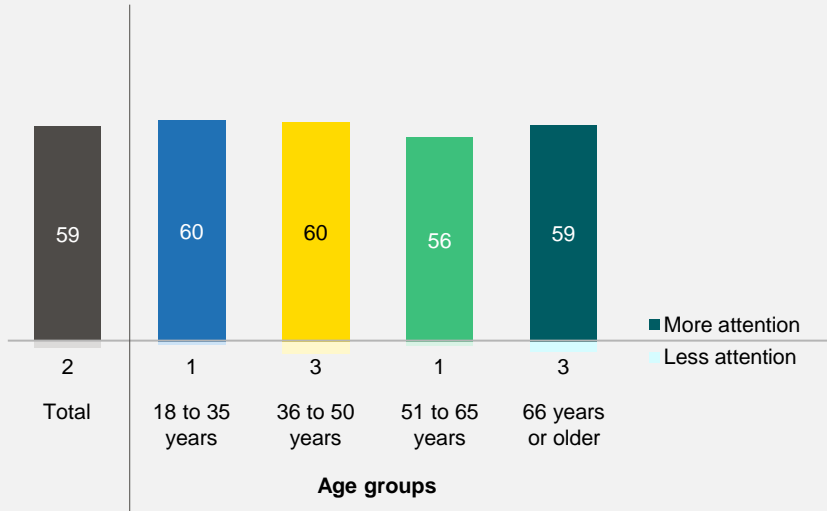
Germany



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: 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

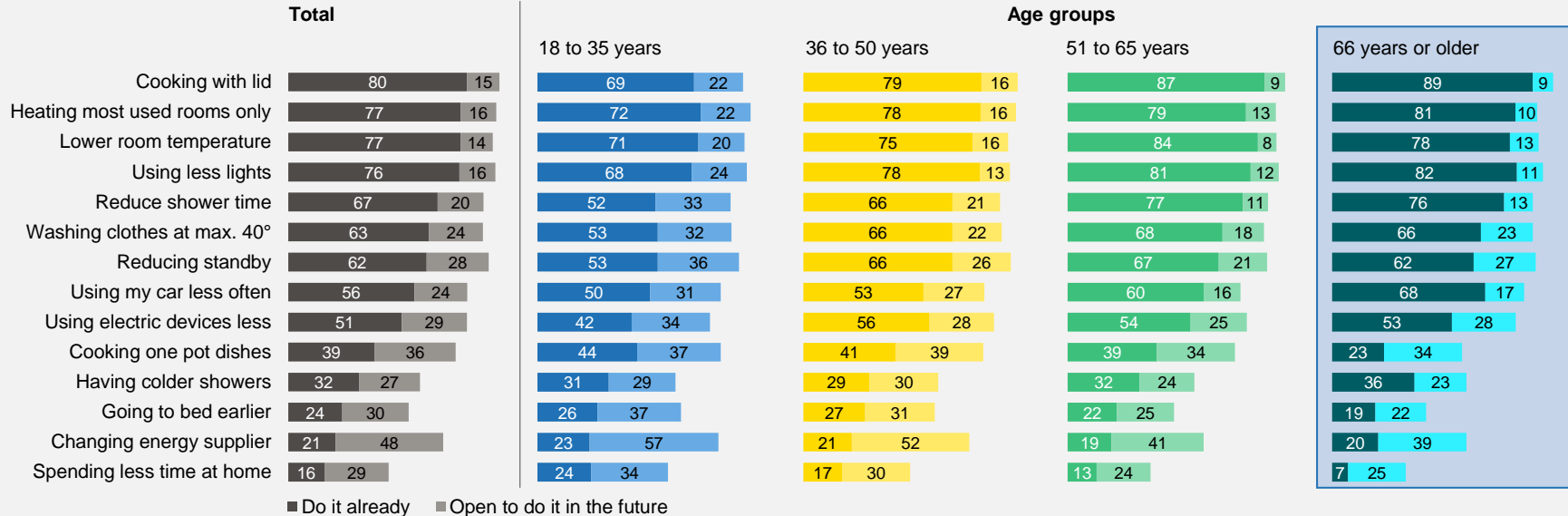
Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; **Base:** GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; **Source:** Statista 2023



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 %



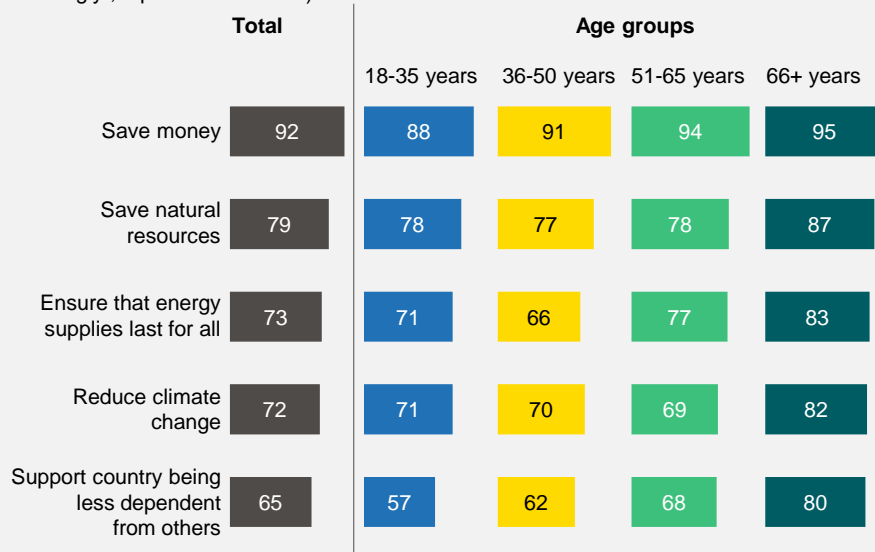
Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; **Base:** GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; Response option "I do not do it and I am not open to reduce my energy consumption this way in the future" not displayed; **Source:** Statista 2023



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

Motivators to reduce energy consumption

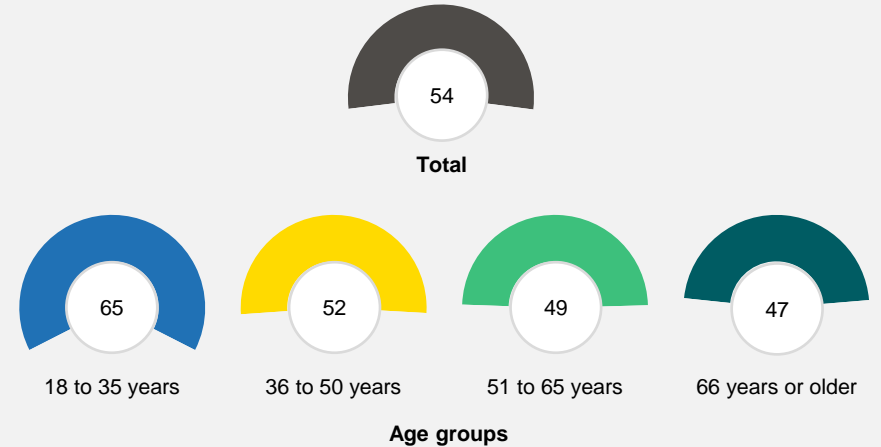
All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me strongly", top 2 values shown)



Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; **Base:** 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

Expected savings from measures

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



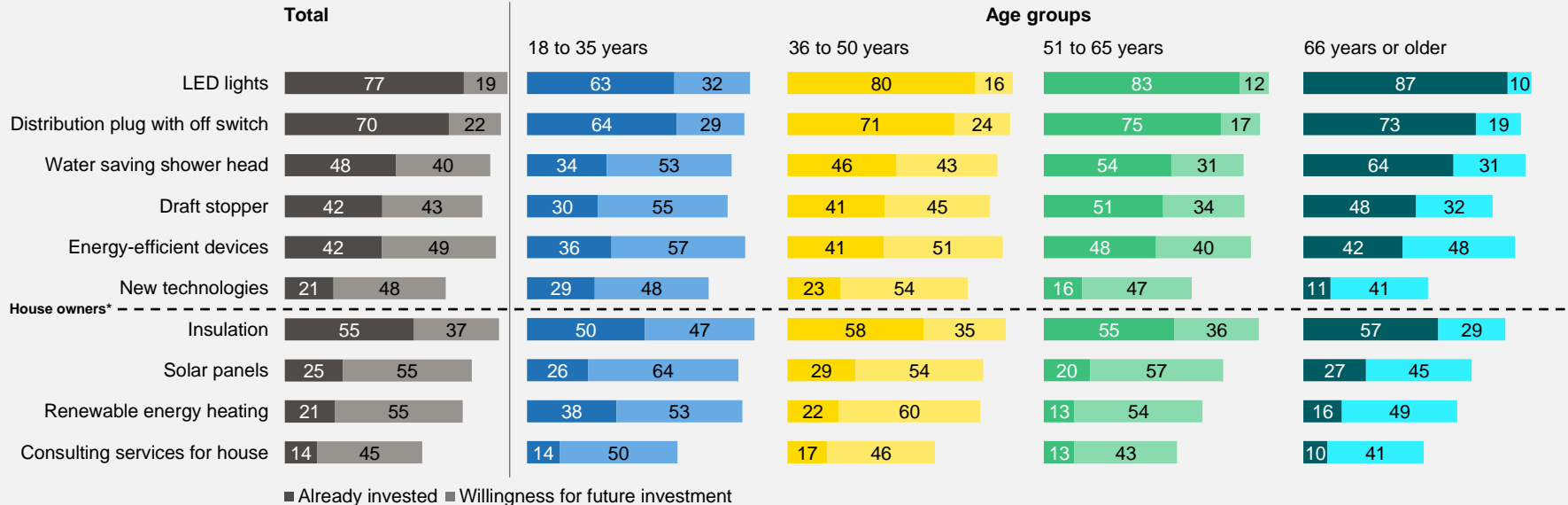
Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; **Base:** GER W1 Total n=960, 18-35 years n=281, 36-50 years n=249, 51-65 years n=280, 66+ years n=150; **Source:** Statista 2023



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 %



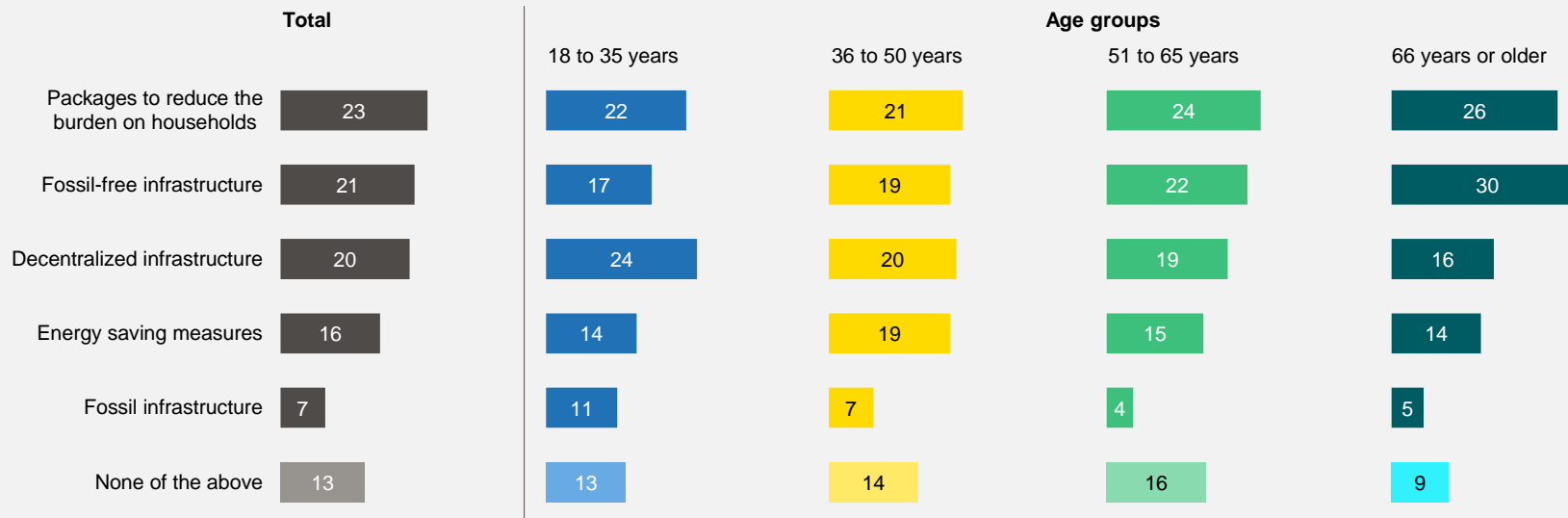
Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; **Base:** GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; *respondents who are house owners: Total n=282, 18-35 years n=58, 36-50 years n=83, 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 2nd

Preferred investment to reduce energy prices

All respondents, in %



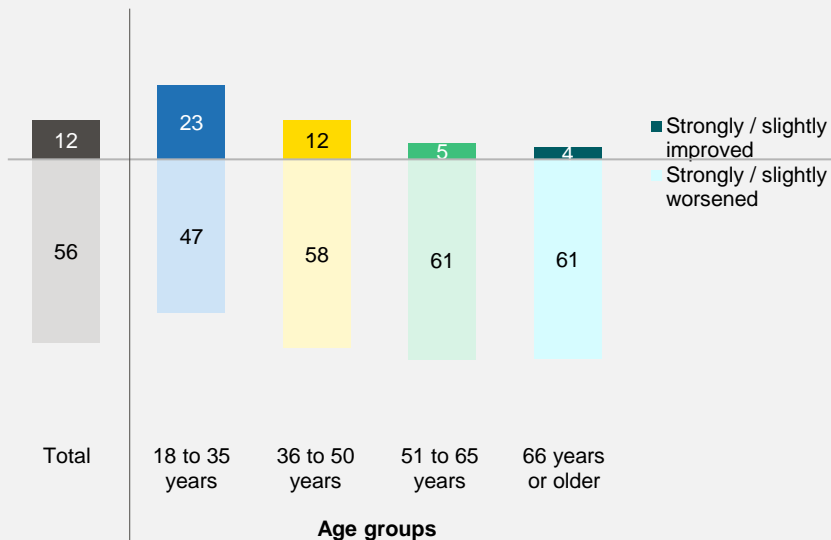
Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; **Base:** GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; **Source:** Statista 2023



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

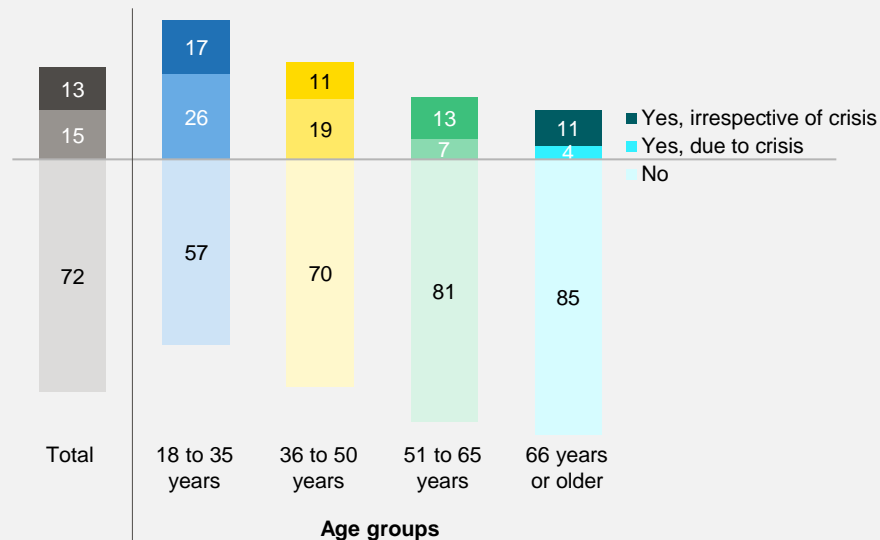
All respondents, in % (scale 1="Strongly worsened" to 5="Strongly improved", top 2 values shown)



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

Usage of energy consulting

All respondents, in %



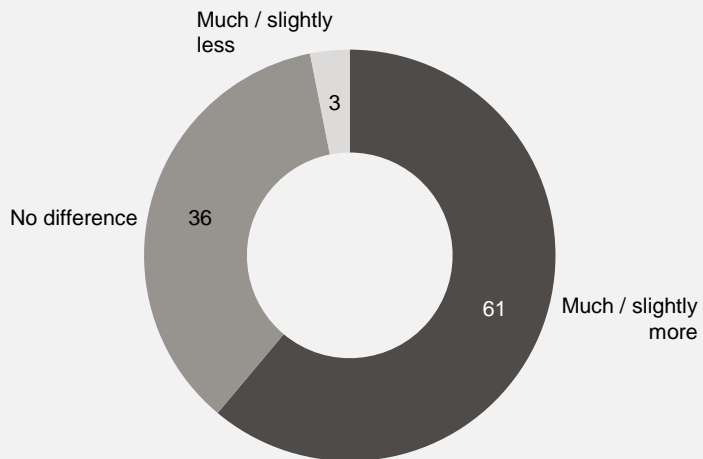
Question: F23 Have you ever made use of an energy consulting?; **Base:** GER W1 Total n=1,000, 18-35 years n=296, 36-50 years n=257, 51-65 years n=290, 66+ years n=157; **Source:** Statista 2023



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

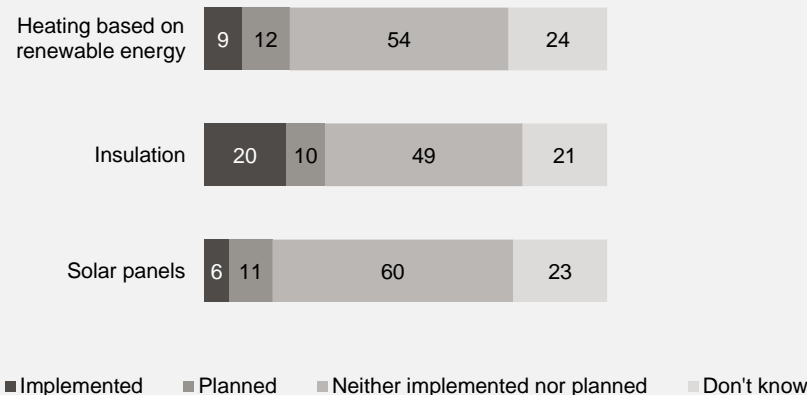
All respondents, in %



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

Energy refurbishments by landlord

Respondents who are tenants, in %



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

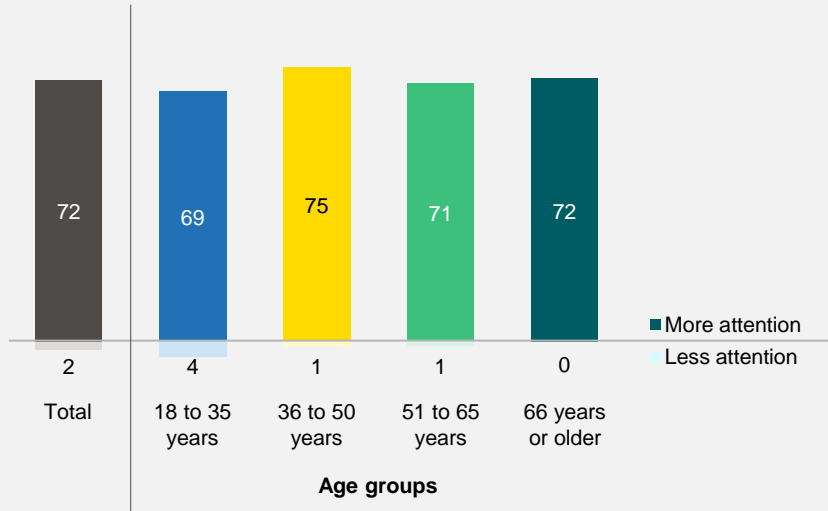
France



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

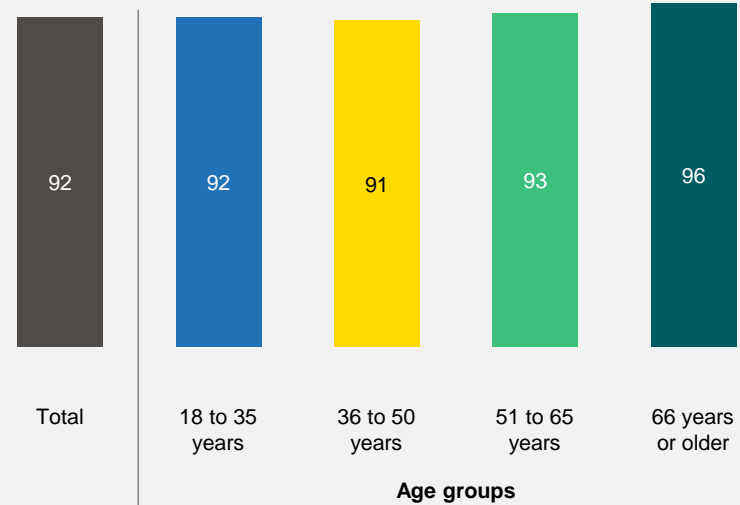
Attention to energy saving since last season

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: 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

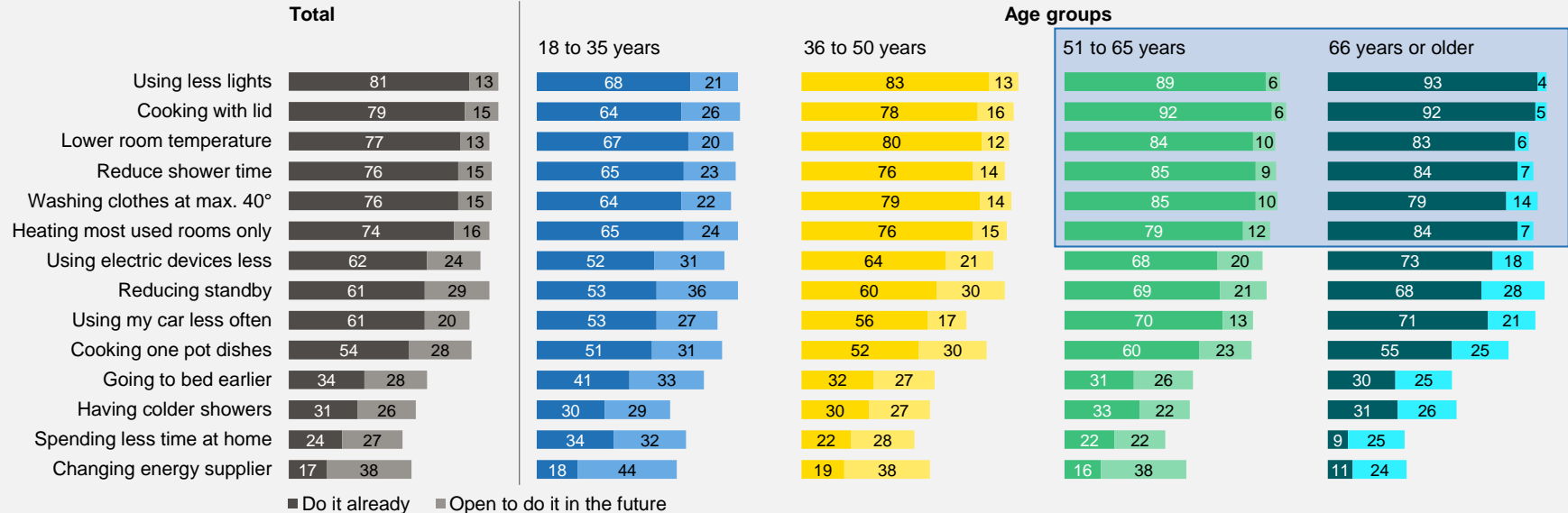
Question: F5 And how relevant is for you to reduce your energy consumption in your everyday life?; **Base:** FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; **Source:** Statista 2023



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 %



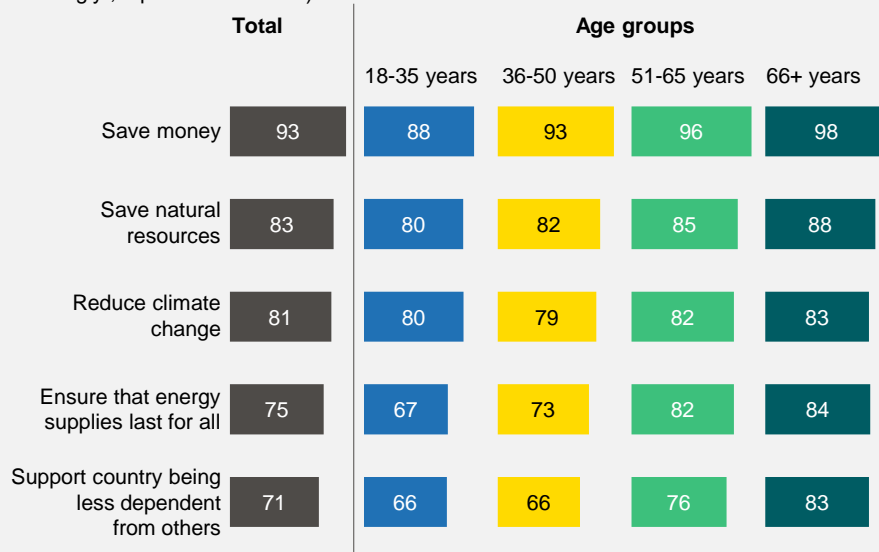
Question: F7 Which of the following measures do you or would you take to reduce your energy consumption?; **Base:** FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; Response option "I do not do it and I am not open to reduce my energy consumption this way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



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

Motivators to reduce energy consumption

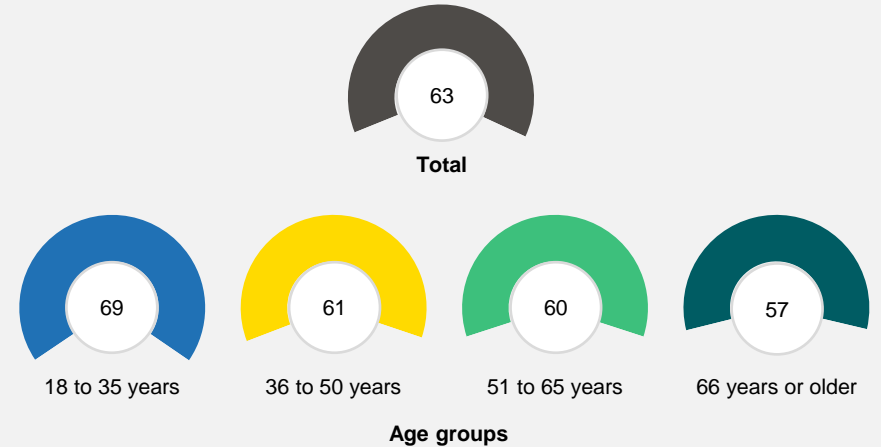
All respondents, in % (scale 1="Does not motivate me at all" to 4="Motivates me strongly", top 2 values shown)



Question: F6 To what extent do the following aspects motivate you to reduce your energy consumption?; **Base:** 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

Expected savings from measures

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



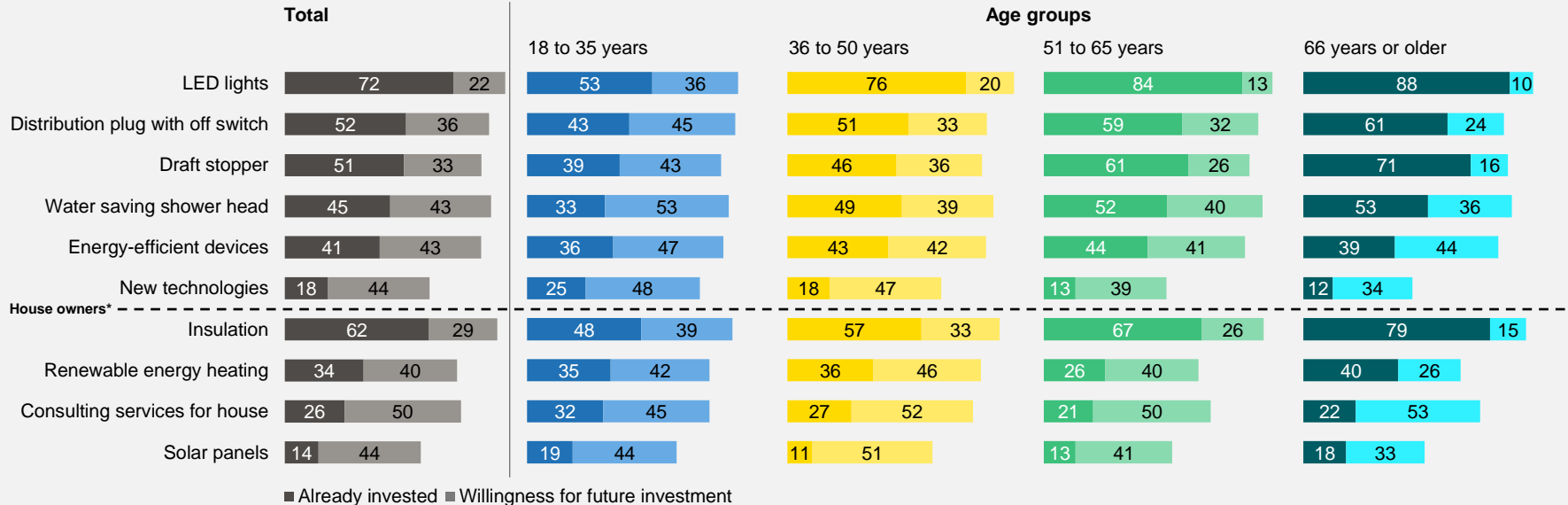
Question: F8 How much energy are you expecting to save with the applied measures compared to your usual behaviour?; **Base:** FRA W1 Total n=970, 18-35 years n=308, 36-50 years n=281, 51-65 years n=262, 66+ years n=119; **Source:** Statista 2023



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 %



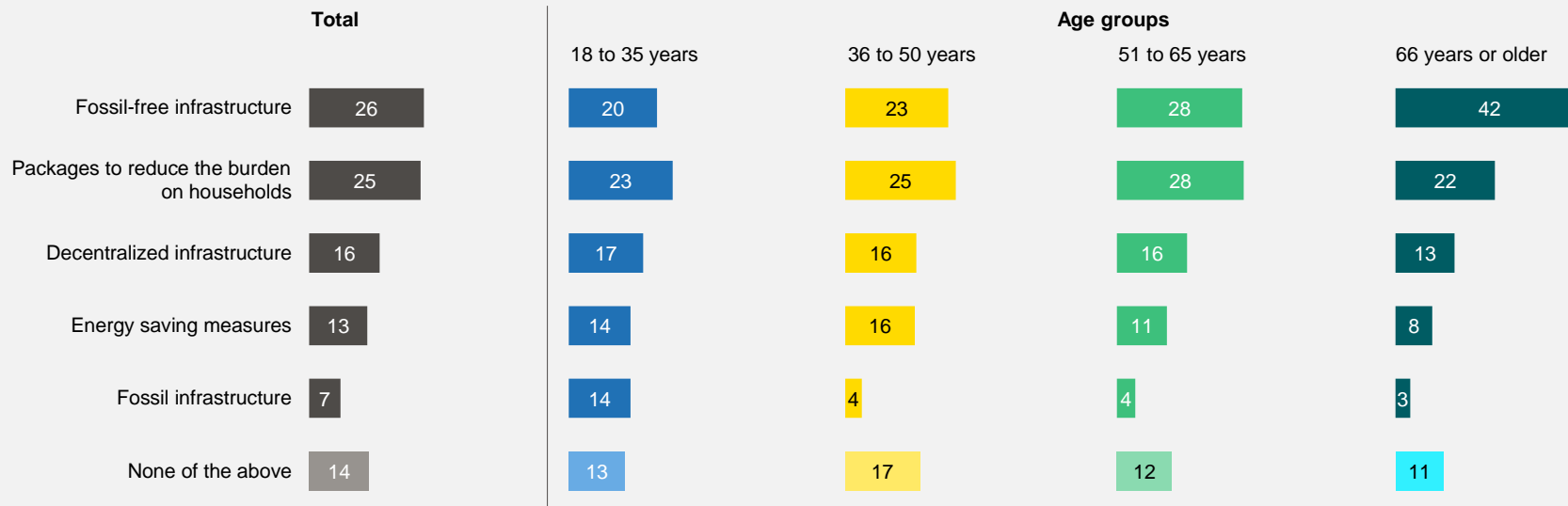
Question: F9 Which of the following innovations did you or would you invest in to reduce your energy consumption?; **Base:** FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; *respondents who are house owners: Total n=450, 18-35 years n=93, 36-50 years n=151, 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

Preferred investment to reduce energy prices

All respondents, in %



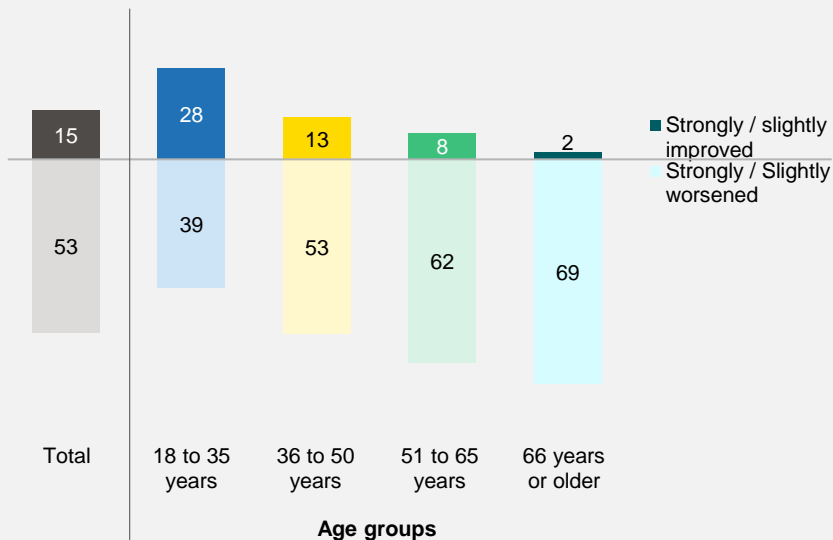
Question: F15 Which of the following investments by the government do you prefer to reduce energy prices?; **Base:** FRA W1 Total n=1,000, 18-35 years n=318, 36-50 years n=294, 51-65 years n=267, 66+ years n=121; **Source:** Statista 2023



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

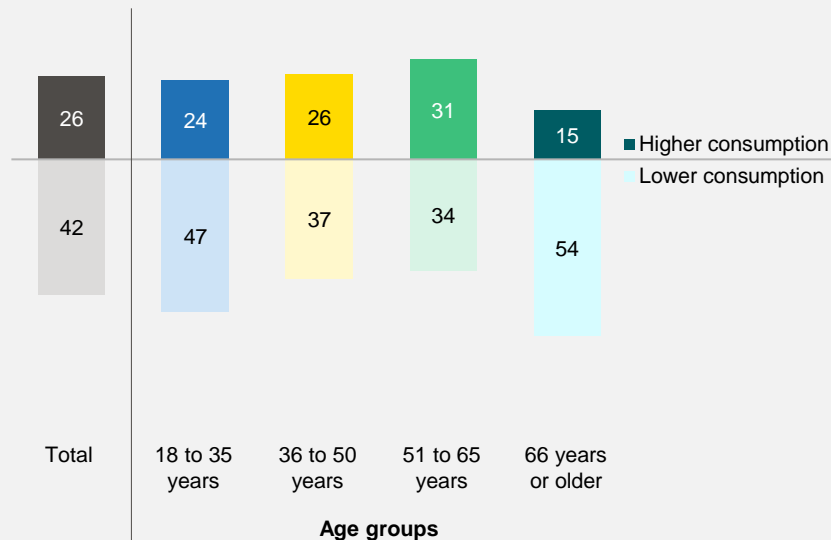
All respondents, in %



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

Change in energy consumption due to working from home

Respondents in whose household at least one person works from home, in %



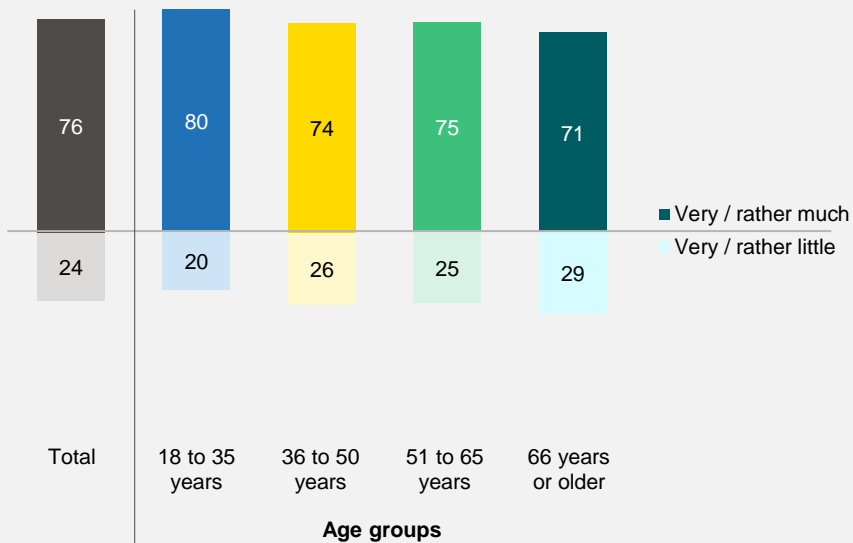
Question: F25 And how has your energy consumption changed due to working from home (if you do so)?; **Base:** FRA W1 Total n=591, 18-35 years n=246, 36-50 years n=186, 51-65 years n=120, 66+ years n=39; Response option "I have not noticed a change" not displayed; **Source:** Statista 2023



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

Willingness to reduce energy for French energy independence

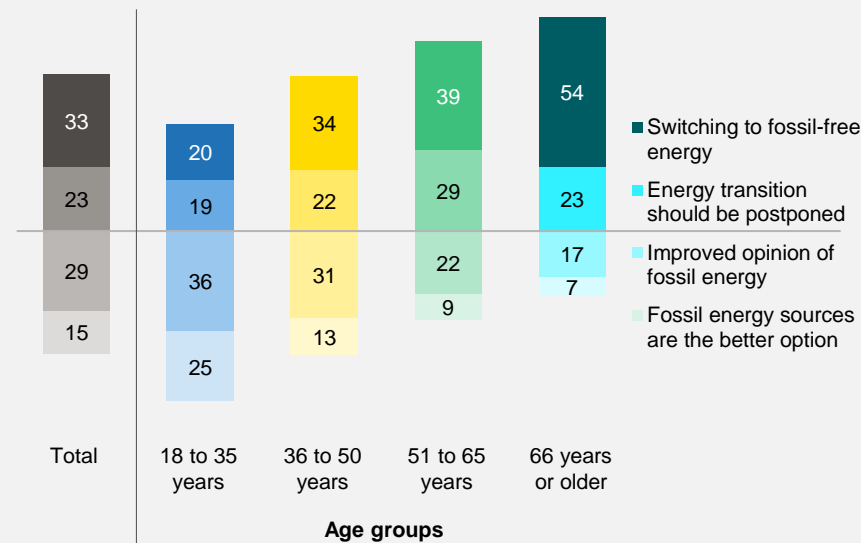
All respondents, in %



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

Attitude towards fossil-free energy

All respondents, in %



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