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**accenture**

*High performance. Delivered.*

**A new consumer mindset – creating new business opportunities and challenges**

***Focus Nordic***

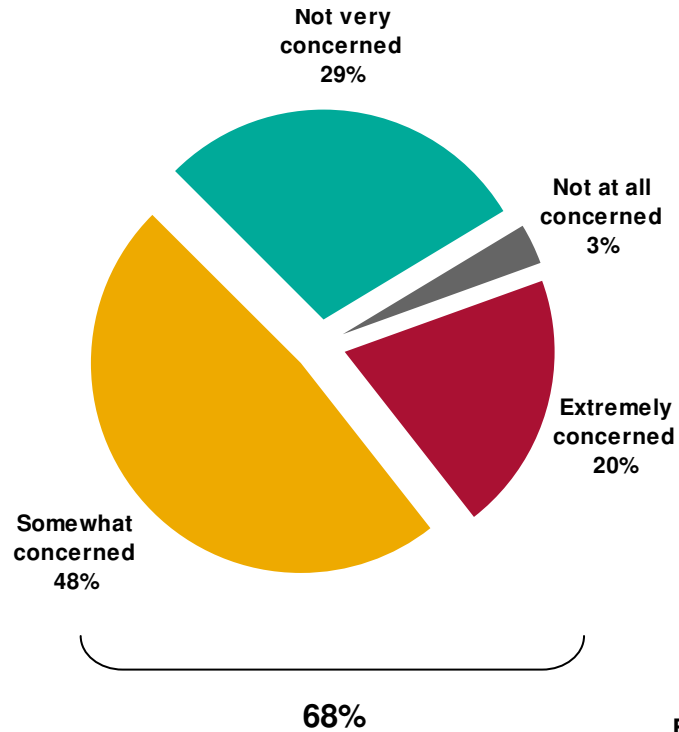
**October 2007**

Nordic specific

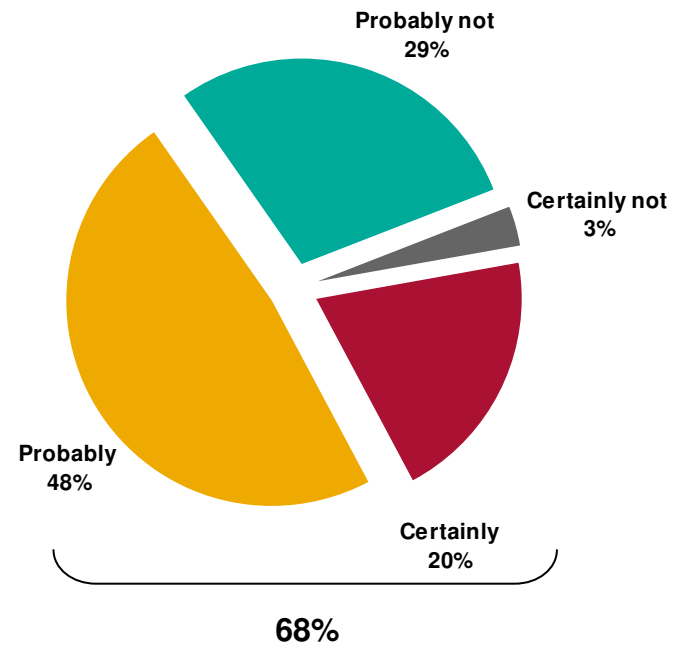
Over 65% of the respondents say that they are concerned by climate change and that it will directly impact their life



“Are you concerned by climate change?”



“Do you think that climate change will directly impact your life?”



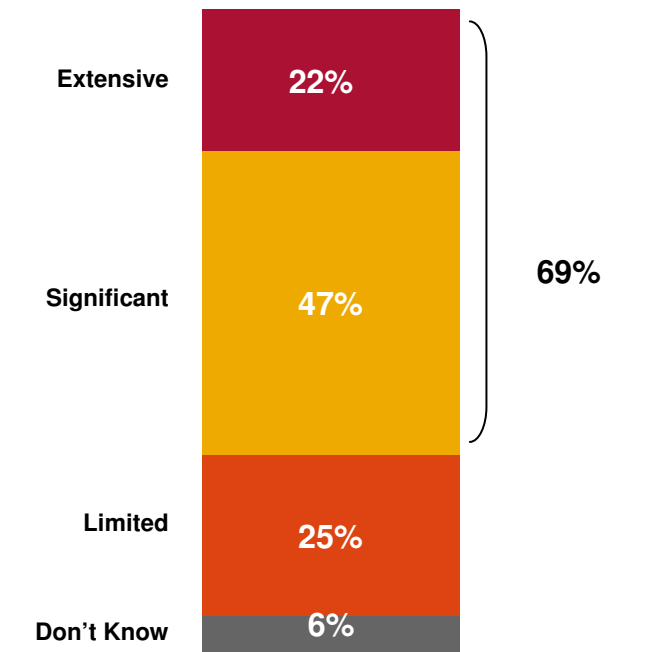
Base: all respondents - Nordic

Nordic specific

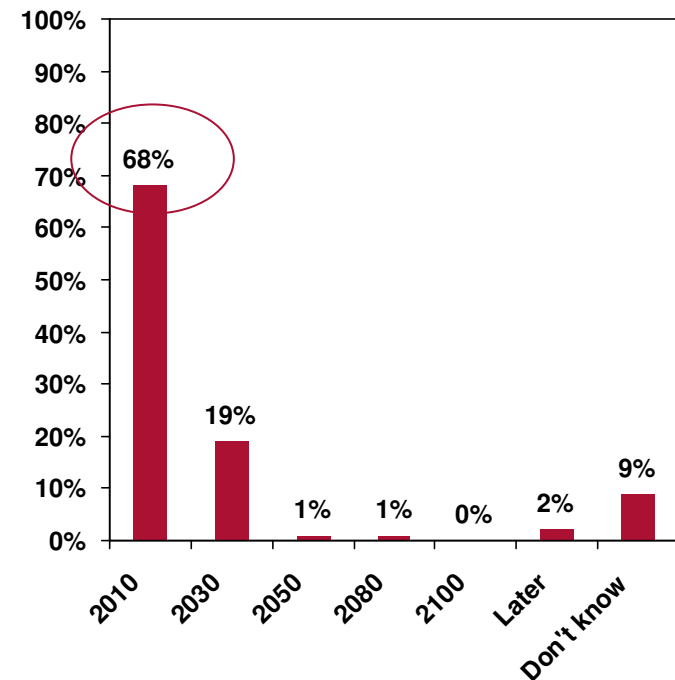
The majority of the consumers think that the reduction in carbon emissions required for their country is important and that it is urgent for the countries to act



“According to you, how large a reduction in carbon emissions will be required for your country?”



“How quickly must most of the countries act in reducing their carbon emissions?”



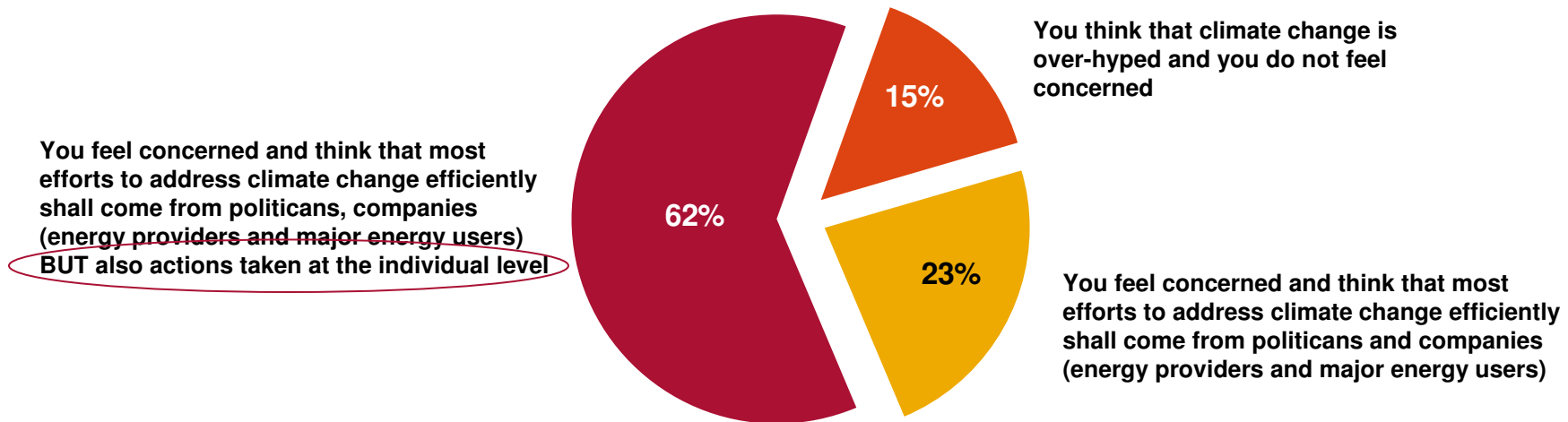
Base: all respondents - Nordic

Nordic specific

62% of the respondents think that individuals have an active role to play to address climate change efficiently



“Which statement best describes what you think?”



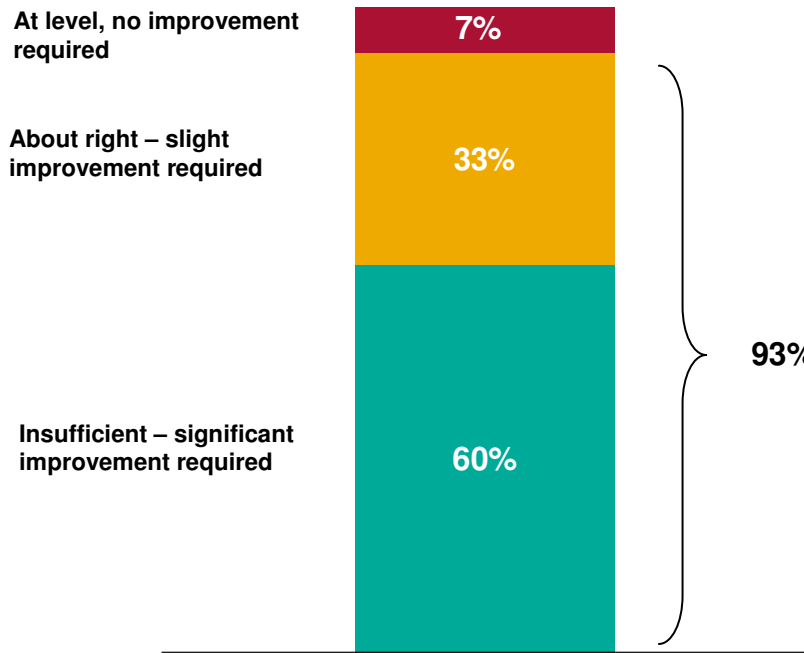
Base: all respondents - Nordic

**Nordic specific**

**Energy Providers can increase their credibility on climate change by improving the clarity and transparency of their communications on their actions taken to address climate change**

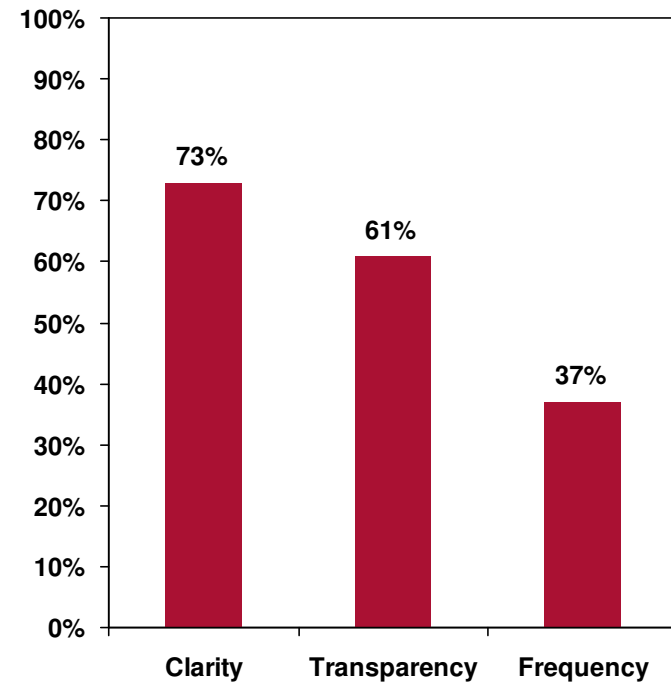


“What do you think of the communications made by Energy Providers (i.e. Electricity, Gas, Oil Providers) on their actions taken to address climate change?”



Base: all respondents - Nordic

“What improvement do you expect on the communications made by Energy Providers on their actions to address climate change?”



Base: All Nordic respondents who feel communications made by Energy Providers on their actions to address climate change require improvement

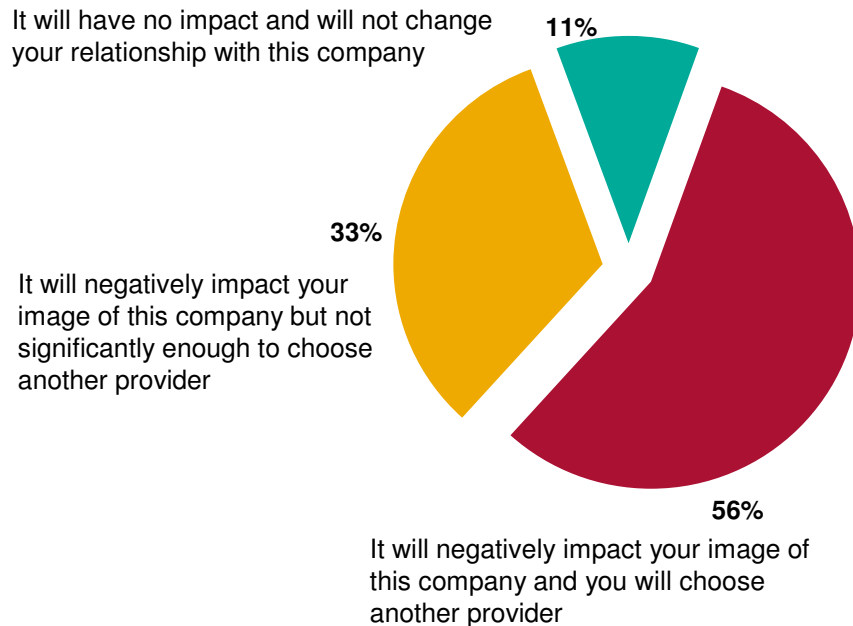
Nordic specific

Climate Change is a real challenge for Energy Providers who will need to take concrete actions to retain their customers

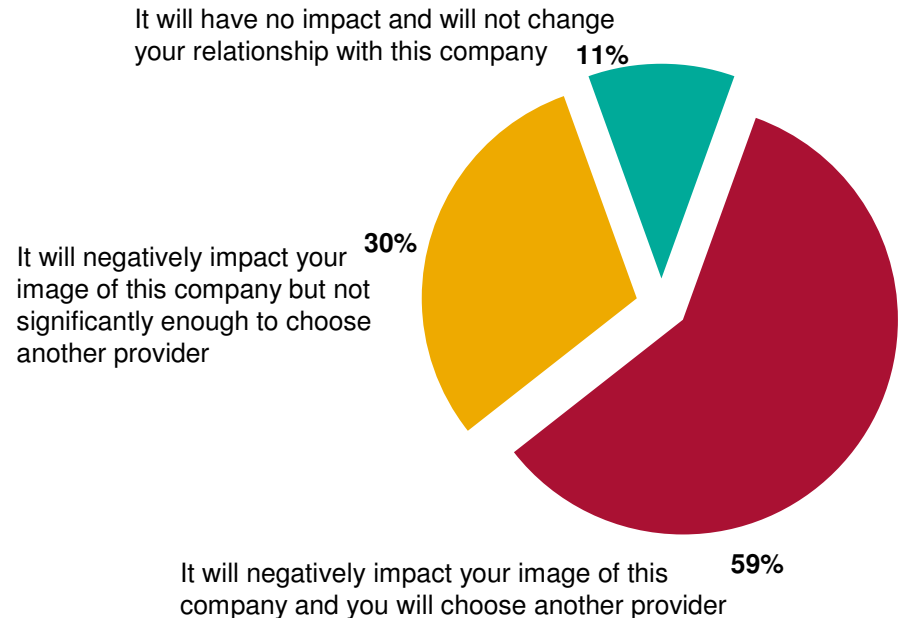


- 1 out of 2 respondents say that they will choose another provider in case thier current provider does not take any concrete actions to address the climate change issue.

“If you hear that an electricity / gas provider does not take any concrete action to address the climate change issue, will that have an impact on the image of this company?”



“If you hear that an oil provider does not take any concrete action to address the climate change issue, will that have an impact on the image of this company?”



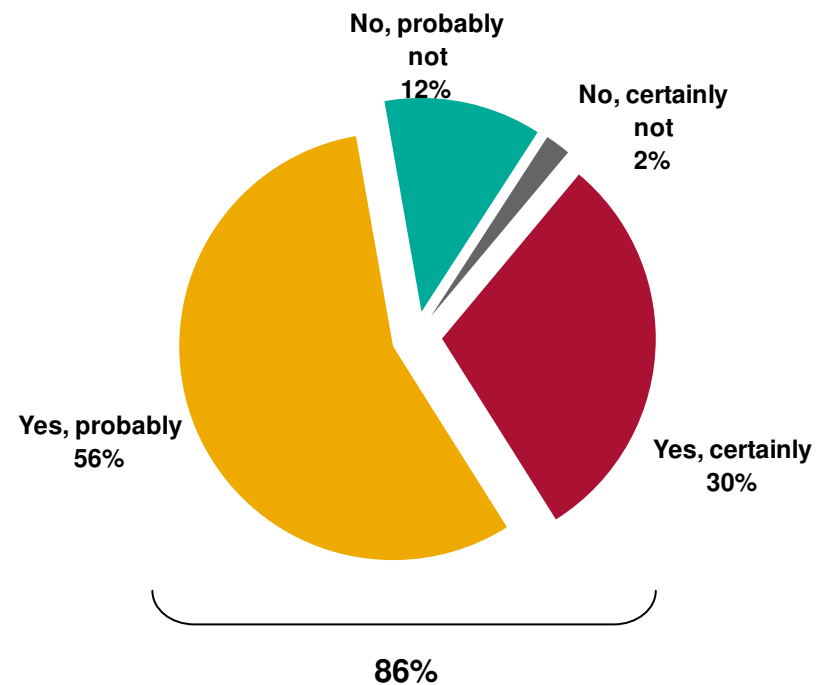
Base: all respondents - Nordic

**Nordic specific**

But it will also be an opportunity for the Energy Providers who will propose products / services that help reduce the level of carbon emission: 86% of the respondents are ready to switch to these providers ...



**“If an energy provider was proposing products / services that help reduce the level of carbon emission would you be willing to switch to this provider?”**



Base: all respondents - Nordic

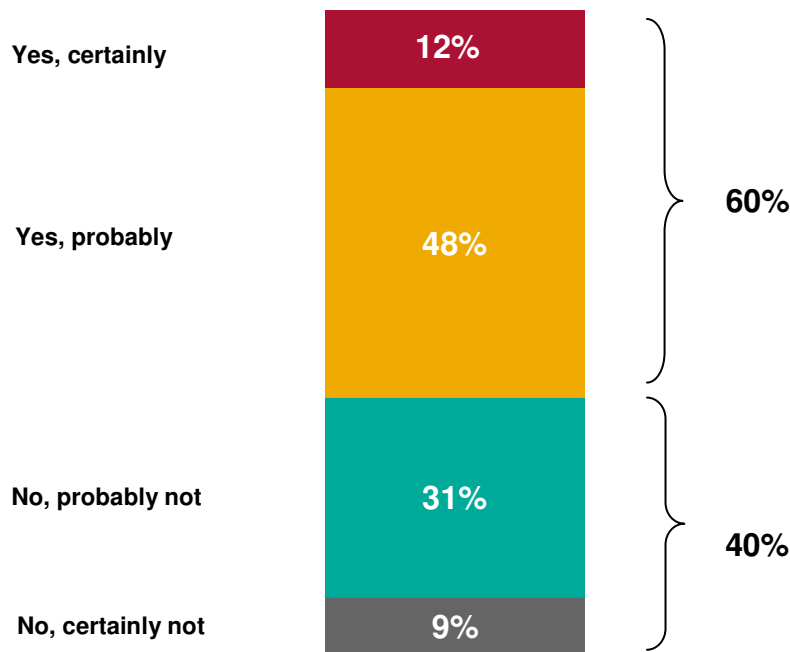
Nordic specific



... and the majority of the respondents are ready to pay to benefit from these products / services

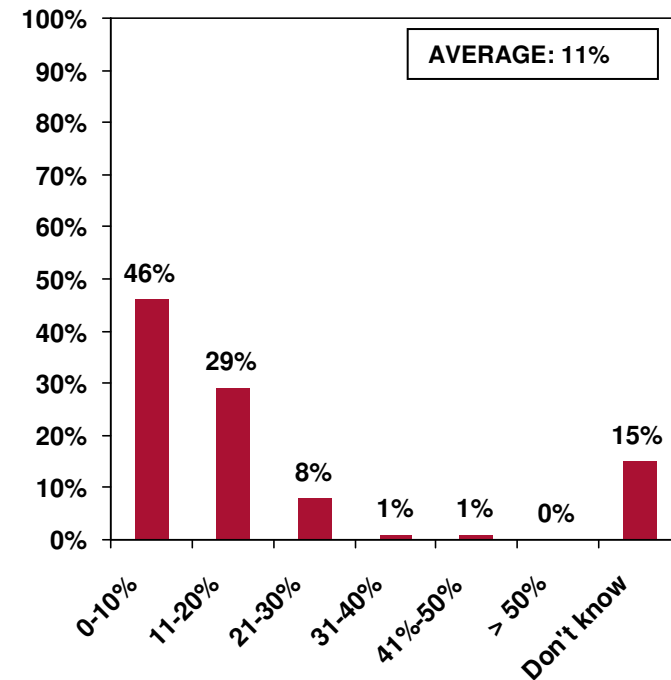
- 60% of the respondents are ready to pay more to benefit from products / services that help reduce the level of carbon emissions
- The average premium individuals are ready to pay is 11%

“Would you be ready to pay more to benefit from products / services that help reduce the level of carbon emission?”



Base: all respondents - Nordic

“What premium would you be ready to pay to benefit from products / services that help reduce the level of carbon emission?”



Base: All Nordic respondents who might pay for more to benefit from products and services that help reduce the level of carbon emission

Nordic specific

Respondents are interested by the majority of the actions / services that might be proposed by Energy Providers



“Would you be interested in the following concrete actions / services that might be proposed by Energy Providers to help you address climate change at a personal level?”

