

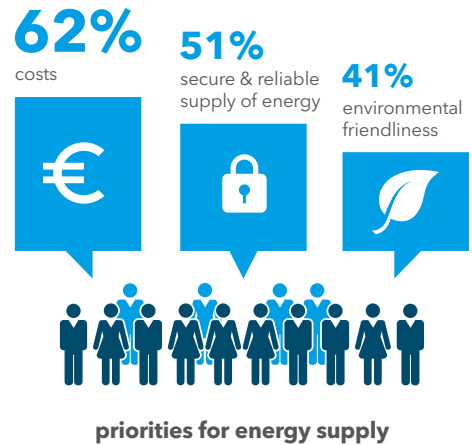
2017 Forsa survey "Energy supply and energy shift"*

What Germans feel to be important as regards energy supply and how they assess the chances of the energy shift

For the fifth time, the German opinion research institute Forsa surveyed tenants as well as house and apartment owners on energy supply in Germany on behalf of WINGAS GmbH. The survey focused on the safety of energy supply and energy transition. In addition to preferred types of energy and heating systems, the survey also asked about renovation projects completed by survey participants in the past year. It once again became clear how popular natural gas is among German citizens. This year for the first time, the survey also asked whether participants were familiar with the German government's Climate Protection Plan 2050 and how people in Germany assess its feasibility.

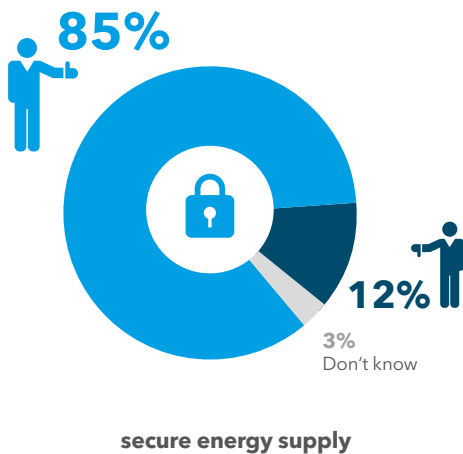
Security and affordability still have top priority

It is particularly important for 62 percent of Germans that prices for electricity and energy remain affordable for all citizens. In 2016, 67 percent still considered this very important. 51 percent view a secure and reliable energy supply as a high priority. 41 percent regard energy generated in an environmentally friendly way to be extremely relevant.



Citizens have confidence in a secure supply

German citizens continue to have great confidence in the current energy supply. As in the previous year, 85 percent consider the current supply for households and corporations to be principally secure and reliable. Almost all age and voting groups share this positive assessment. It is an especially strong sentiment in the 30 to 44 year age group, with 91 percent. At 85 percent, the positive assessment of supply security is as high as in the previous year. Only 12 percent of German citizens consider the energy supply to be uncertain. This is one percentage point less than in 2016.

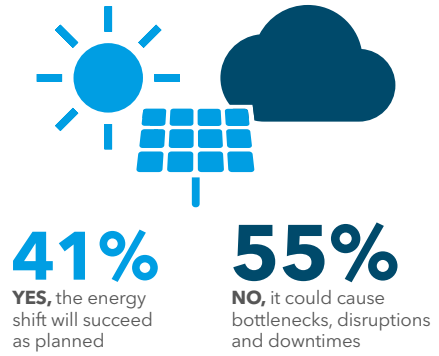


*Forsa Politik- und Sozialforschung GmbH interviewed 1,001 citizens over 14 years of age between 18 and 24 May 2017 on behalf of WINGAS. 501 house or apartment owners were also surveyed. All the figures in the charts are percentages.

Citizens remain skeptical whether the energy shift will be achieved

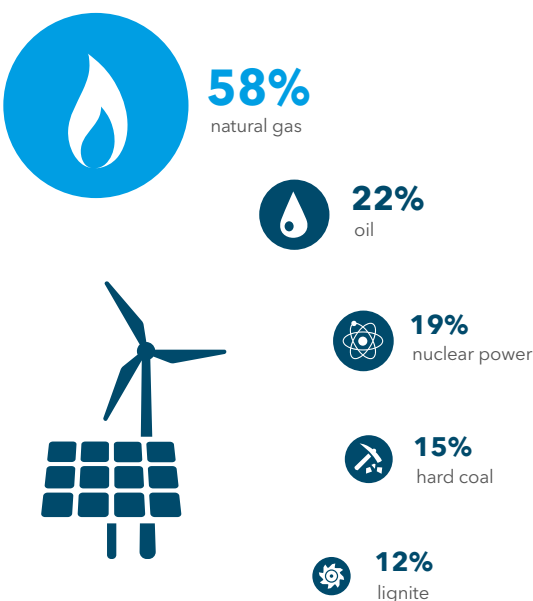
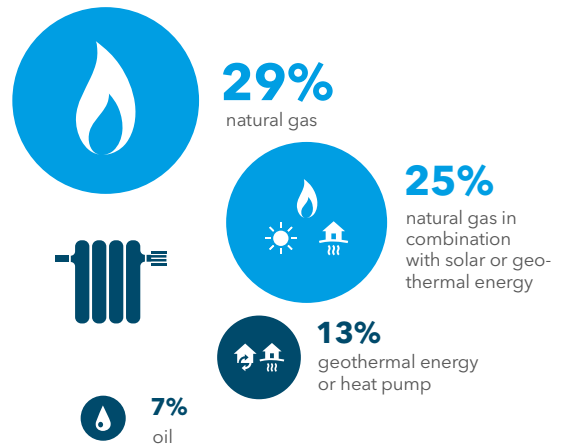
With regard to the feasibility of the energy shift, survey participants show differing opinions. As in 2016, 41 percent of those surveyed still believe that the energy shift will be accomplished. The share of those who are concerned about shortages, disruptions and outages climbed to 55 percent, one percentage point higher than last year. Therefore, a little more than half of those questioned continue to believe that implementation of the energy shift can lead to problems.

Will the energy shift succeed?



Gas heating continues to be the most popular heating system

With regard to types of heating, natural gas has maintained its leading position ahead of other heating systems. 29 percent of all house and apartment owners would choose gas heating if they needed to replace their heating systems. 25 percent of those surveyed favored natural gas heating in combination with solar or geothermal energy. This corresponds approximately with the response from the previous year. Other heating systems are comparatively less in demand. Only 13 percent would choose geothermal heating or heat pump and only 7 percent would choose oil heating (after 10 percent in 2016).



Germans prefer natural gas as a partner to renewable energies

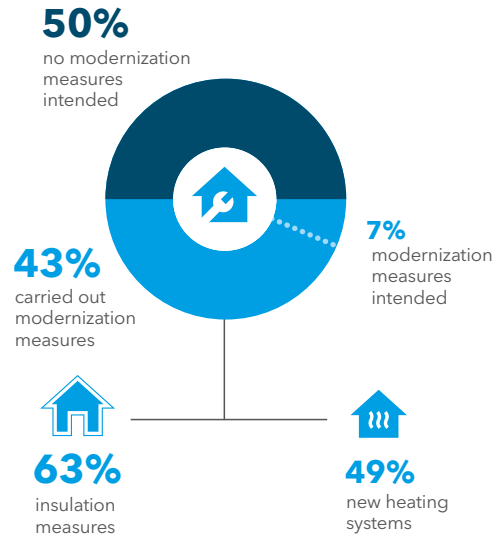
Because the energy produced from regenerative sources alone will not be sufficient to meet the energy demand in Germany in the near future, traditional energy sources will remain indispensable as part of the supply mix. Natural gas is considered the preferred partner for renewables by a large majority of those surveyed. 58 percent of Germans would like to see natural gas take over supplying energy along with solar and wind power. That means natural gas is well ahead of oil (22 percent), nuclear power (19 percent), hard coal (15 percent) and lignite (12 percent). Oil and lignite in particular have lost support from citizens: In 2016, 27 percent of Germans still favored oil and 16 percent favored lignite.

Energy efficiency measures: Heating system modernization and building insulation

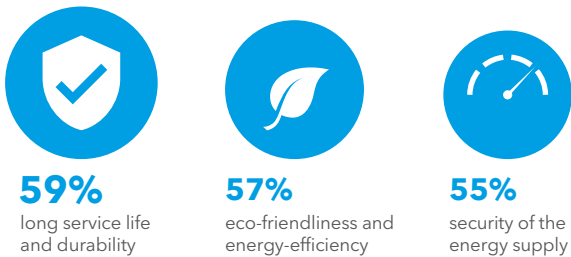
Half of house and apartment owners have carried out modernization measures in the past five years (43 percent) or said they intended to (seven percent). In 2016, that figure still amounted to 52 percent. That means there is still great potential for reducing CO₂ emissions through energy-efficient measures.

63 percent of survey participants who completed projects invested in insulation projects and 49 percent invested in new heating systems. The share of those who invested in new heating systems rose by 9 percentage points compared to last year.

Modernization measures

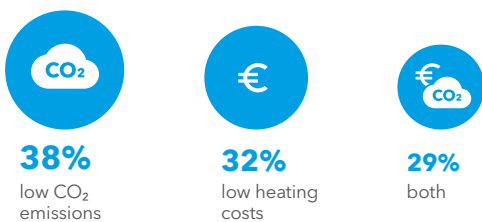


Main criteria for heating systems



When choosing new heating systems, owners consider durability and reliability to be very important (59 percent). Many also regard environmentally-friendly and energy-efficient functionality of the systems to be very important (57 percent). The security of the energy supply followed close behind (55 percent).

As low as possible CO₂ emissions or heating costs?



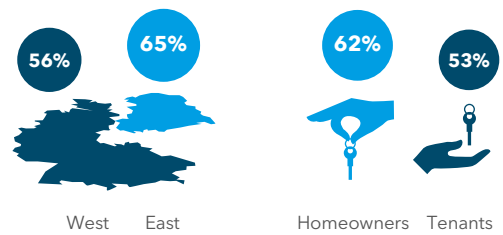
When asked about what would be more important when selecting a heating system - lower CO₂ emissions or lower heating costs - 38 percent would choose the lowest possible CO₂ emissions, and 32 percent would opt for the lowest possible heating costs. For 29 percent of those surveyed, the factors are equally important. The preference changed compared to 2016: In the previous year, 35 percent opted for primarily low heating costs and 34 percent for the lowest possible CO₂ emissions.

3 out of 5 German citizens are familiar with the government's Climate Protection Plan 2050

The German government plans to have renewable energies meet the majority of the energy demand in all areas by 2050. 59 percent of those surveyed have already heard about this target. This is true for (almost) all age groups, with some slight variances. Only respondents under 30 years of age show below-average knowledge of the Climate Protection Plan, with 42 percent. Differences are apparent when comparing east (65 percent) and west (56 percent) and when comparing homeowners (62 percent) and tenants (53 percent).

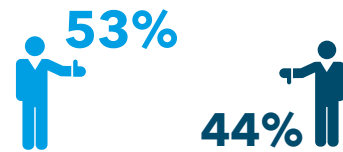


Familiarity of the Climate Protection Plan

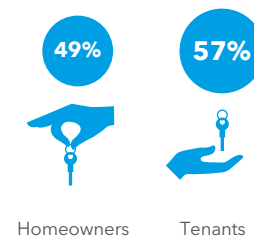


Different opinions regarding feasibility of the Climate Protection Plan

Only 53 percent of those who have heard about the Climate Protection Plan regard its implementation as realistic by 2050. 44 percent do not think it will be accomplished. Opinions hardly varied among those in the east and those in the west. Differences are seen, however, when comparing homeowners and tenants. Just 49 percent of homeowners consider the goal realistic, while the figure for tenants is 57.



Is the Climate Protection Plan realistic?



Press contact