

Forsa Study 2021: Survey on the energy transition and natural gas

Natural gas stands for a secure energy supply

Which role does natural gas play with regard to the energy transition and how can the transition succeed in Germany? These and further questions were addressed in a representative survey conducted in September 2021 by forsa Politik- und Sozialforschung GmbH on behalf of the association Zukunft Gas. The results clearly demonstrate that natural gas is highly valued as an energy source, especially in terms of security of supply and as a raw material for hydrogen.

The most important results

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| 26 % | believe that the energy transition will be achieved without difficulties. | 49 % | assign the property "secure energy supply" to natural gas. |
| 29 % | are in favour of natural gas as a supplement to renewable energies. | 61 % | are in favour of hydrogen based on natural gas. |
| 99 % | think the guarantee of a secure and reliable energy supply is important. | 13 % | opt for a pure natural gas heating system for new buildings. |

Majority expects difficulties with the energy transition

At the heart of the energy transition is the challenge to further expand renewable energy production (e.g. solar and wind energy) and thereby make the majority of energy production as climate friendly as possible. According to the survey, **69 percent of respondents do not believe the energy transition will succeed as planned and without difficulties.** They expect there could be bottlenecks or even disruptions and failures in the supply. Only a quarter of the respondents (26 %) assume that the energy transition will succeed as planned and without any difficulties. Especially younger participants under the age of 30 tend to hold an above-average level of confidence in the success of the energy transition.

Will the energy transition succeed without any bottlenecks and disruptions?



Note: Data missing from 100 percent = "don't know"

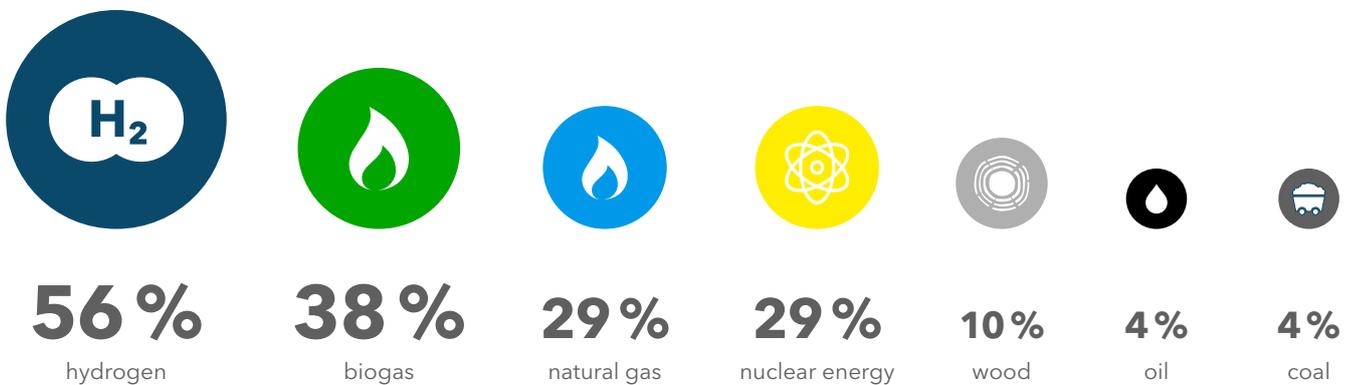
Especially interesting is the potential role function: If Germany was to succeed in the transition to renewable energies, it would, according to the opinion of 43 percent of the respondents, encourage other countries to follow this example with regard to their energy policies. 55 percent believe that this would have little influence on the energy policies in other countries

Information on the methodology: The survey was conducted between the 8th and 10th of September 2021 as part of the representative survey panel forsa.omninet. In total 1,051 respondents over the age of 18 were surveyed in Germany (according to a random sampling procedure). The results obtained can be applied to the entire adult population in Germany with a margin of error of +/- 3 percentage points.

Hydrogen has the highest approval for complementing renewable energies

At present, reliable generation of electricity from renewable energies cannot be guaranteed, as the sun does not constantly shine and there is not always enough wind. When asked about the composition of the energy mix, more than half of the respondents (56%) state that **hydrogen is the best complement to renewable energies looking at environment, climate, costs and security of supply**. 38 percent name biogas and 29 percent each name **natural gas** as well as nuclear energy as a complement to the energy mix.

Best complement to renewable energies (looking at environmental, climate, cost and security of supply aspects)

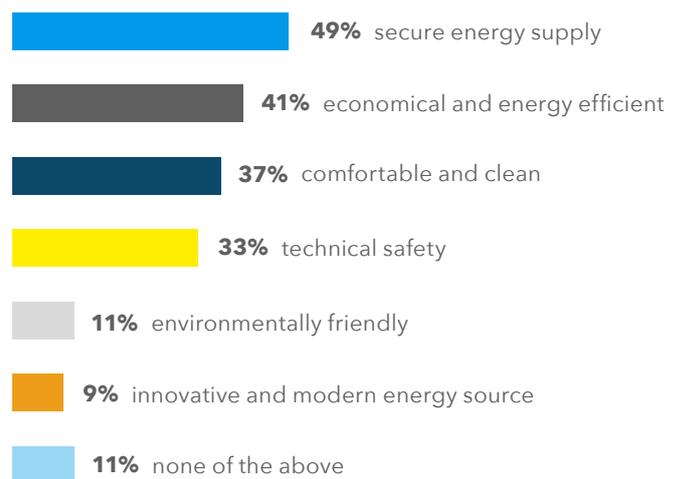


Note: Percentage sum greater than 100, as multiple choices were possible

Properties of natural gas as an energy source

For **99 percent** of respondents ensuring a **secure and reliable energy supply is “(very) important”**. Electricity and energy remaining affordable for all citizens is “very important” to 79 percent of respondents, another 18 percent find it “important”. An additional 45 percent of respondents state that they think it is “very important” that energy is produced in an environmentally friendly way.

About half of the respondents (49%) ascribe the property “secure energy supply” to natural gas as an energy source. 41 percent consider natural gas to be economical and efficient. About one third believe that the properties “comfortable and clean” as well as “technically safe” apply to natural gas.

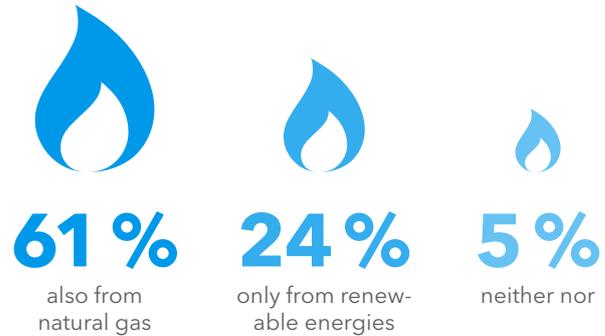


Note: Percentage sum greater than 100, as multiple choices were possible

Hydrogen from natural gas: an option for 61 percent

As an energy source, hydrogen plays an elementary role in the achievement of climate targets. The advantage: no environmentally harmful CO₂ is released during combustion. Hydrogen can be produced through various processes. One example is natural gas, which is - compared to renewable energy sources - sufficiently available as a raw material for hydrogen production. 61 percent of respondents agree that **hydrogen should also be produced from natural gas** in an almost climate neutral way, without releasing CO₂ into the atmosphere. Approximately a quarter have the opinion that hydrogen should in principle only be produced from renewable energies, even if this still takes a few years.

Energy sources for the production of hydrogen



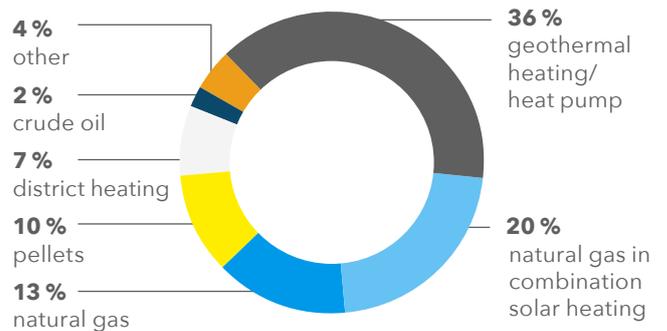
Note: Data missing from 100 percent = "don't know"

Natural gas is one of the preferred types of heating for new buildings

As part of the survey, house and flat owners were also asked - among other things - which type of heating they would choose if they had to install a (new) heating system today. Just over one third (36%) said they would choose geothermal heat/heat pumps. 20 percent would choose a natural gas heating system in combination with solar heating, 13 percent a heating system with natural gas and 10 percent a heating system with pellets.

The most important aspects concerning the decision for a heating system for owners are reliability (77%), cost (73%), but also eco-friendliness (64%) and efficiency (61%). 54 percent name easy handling as an important aspect for decision making. About one third of the respondents each name state subsidies and a low threshold or requirements on state level are particularly important when deciding on a heating system.

Preferred heating systems of house and flat owners



Conclusion

The current survey clearly shows: the majority of respondents doubt a smooth implementation of the energy transition and fear bottlenecks or disruptions in the energy supply. **Respondents attribute natural gas a central role in the energy transition.** The energy source is especially highly regarded when it comes to security of supply and affordability. Moreover, natural gas is also considered to have great potential as a raw material for hydrogen production.

