

## What is important to the Germans when it comes to the energy supply and how they see the opportunities arising from the energy transition

### Priorities of the energy supply: security and price are decisive

The citizens of Germany agree: when it comes to the energy supply, costs and supply security have top priority. Hence, in response to the question of what is particularly important when it comes to the energy supply, nearly three quarters of Germans underline that the prices for electricity and energy must remain affordable for all citizens.

For 60% of those asked, it is very relevant that the energy supply is secure and reliable at all times, whereas 41% said it is very important that energy is generated in a way that protects the climate. It therefore became evident that public opinion on the energy supply and the energy transition has barely changed in spring 2015 since the previous year.

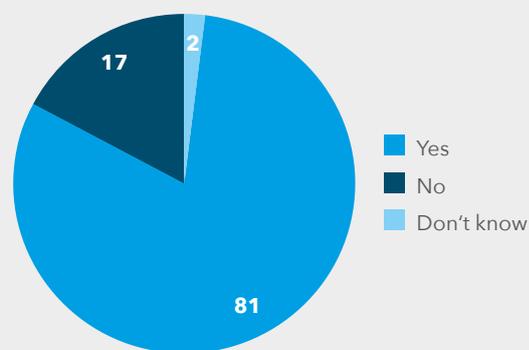
#### For the energy supply it is very important that



### The Germans consider the current supply secure

The citizens of Germany have confidence in the current energy supply. More than three quarters consider the current supply of households and companies to be generally secure. This positive view is reflected in all age and voter groups with very few exceptions. Compared to 2014 the proportion of the population that considers the energy supply to be secure has even risen slightly - from 75% to 81%.

#### A secure and reliable supply with energy in Germany is ensured

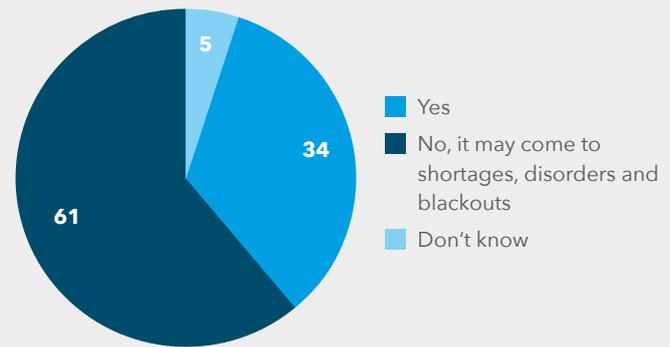


\*Forsa Politik- und Sozialforschung GmbH interviewed 1,001 citizens aged 14 or over on behalf of WINGAS from 30 April to 6 May 2015. In addition, 543 homeowners were interviewed. All figures in the graphs are in percent. To 100 missing percent: don't know / no information.

## But: scepticism about the energy transition - future shortages feared

The Germans are certainly critical of the energy transition. Only a third believes that the energy transition as envisaged by policy-makers will succeed. And more than 60 % believe that the implementation of the energy transition can lead to problems or even blackouts.

### The energy transition will succeed as planned



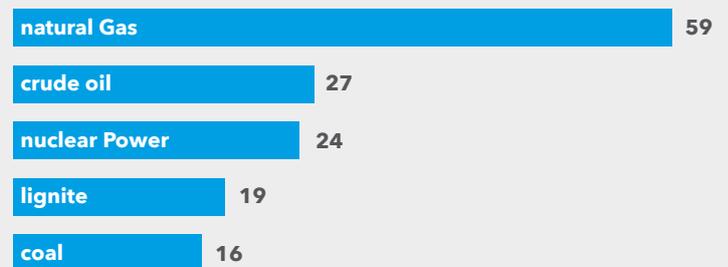
## Natural gas is clearly the ideal partner for the renewables

Renewable energies cannot ensure a reliable and affordable energy supply on their own. Experts have underlined this. And the citizens see it this way too.

In all population and voter groups, natural gas is preferred by the majority as the partner for renewables. Three out of five German citizens say that natural gas, together with the wind and sun, should secure the energy supply.

That puts natural gas significantly ahead of nuclear power (24%) and ahead of all the other fossil fuels (crude oil 27%, lignite 19%, coal 16%).

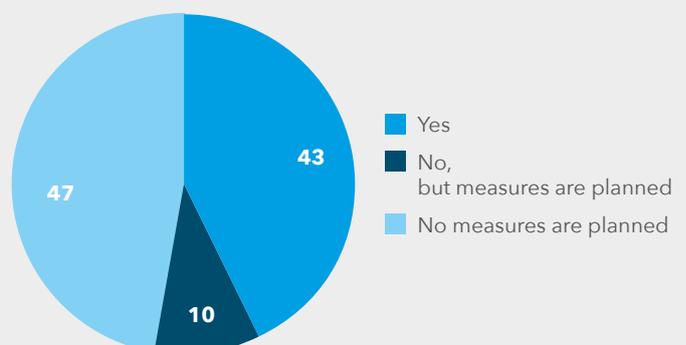
### To secure the energy supply for households and economy, should also be used next to renewable energy:



## For more energy efficiency: heating refurbishment and building insulation

Only just over half of home owners say they have carried out measures to insulate their homes or renovate their heating systems in the last 5 years (43%) or say they are planning such measures (10%). So there is a great deal of potential here to enhance energy efficiency and to reduce CO<sub>2</sub> emissions. Out of those who carried out measures, 70% have taken measures to insulate their homes and 46% have installed new heating systems. These percentage shares have nudged slightly towards the renewal of heating systems compared to 2014. When choosing a new heating system, for home owners the most important criteria are that the systems last a long time and are reliable (62%) that they guarantee a secure supply and run in an environmentally friendly manner (60% and 55%). Almost two thirds prefer natural gas as the energy source, and 12% consider combined heat and power or a fuel cell in this context.

### In the last 5 years measures for insulation or renovation of heating systems have been carried out in your house / freehold flat



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