

Public Opinion of EU Methane Regulation

Key findings from a survey of respondents in France,
Germany, Italy, and Poland

August 4-9, 2022

YouGov®



CLEAN AIR
TASK FORCE

Screenshot of a video of methane venting from a natural gas facility in Germany. Take by CATF using a FLIR GF320 optical gas imaging camera.

Summary

- Background
- Methodology
- Key Findings
- Attitudes towards EU Methane Regulation
- Knowledge about Methane and Methane Impacts on the Climate
- Associations with the terms 'Methane' and 'Natural Gas'



Background

After many years of slipping under the radar, **methane pollution is becoming a climate priority**. The latest report by the Intergovernmental Panel on Climate Change (IPCC) attributed **0.5°C of climate warming** to methane. Other reports in 2021 by the International Energy Agency (IEA) and the United Nations Environment Program (UNEP) highlighted the **need to drastically reduce methane pollution from energy, waste, and agriculture** by the end of this decade to keep international climate goals in reach.

With the Global Methane Pledge, **more than 150 countries** have publicly committed to reducing global methane emissions by 2030. We will need immediate interventions to reduce methane across all three sectors in this decade. Targeting reductions in the energy sector represents the most cost-effective solutions. The IEA estimates fossil fuel operators could achieve 75% reductions with existing technologies, and 40% of those would come at zero net cost (according to average price of gas from 2017-2021).



Background

In 2020, the European Union (EU) began a multi-year process to develop legislation aimed at reducing methane emissions from the oil and gas industry and other sectors by announcing its Methane Strategy. **In late 2021, the European Commission proposed the Methane Regulation**, the first EU-wide legislation aimed at cutting methane emissions in the energy sector. In 2022, debate over the regulation moved into the European Council and the EU Parliament.

In August 2022, Clean Air Task Force commissioned YouGov to administer **a public opinion survey of 6,251 respondents** from France, Germany, Italy, and Poland on knowledge about and attitudes towards methane pollution and the EU methane regulations. We appreciate support from Parrish Bergquist (Georgetown University) and Paasha Mahdavi (University of Santa Barbara) for review of survey instrument, design, and analysis.



Methodology

Survey Dates

- France: 4-9 August 2022
- Germany: 4-9 August 2022
- Italy: 4-9 August 2022
- Poland: 4-8 August 2022

Methodology

The survey was conducted online using YouGov's proprietary panels. The order in which findings are presented in this report do not reflect the order in which questions were asked during the survey.

Sample

- **General knowledge questions**, unless otherwise stated, were conducted among a nationally representative sample of 6,251 respondents aged 18+ in France (1,545), Germany (1,546), Italy (1,583), and Poland (1,577).
- **Policy-specific questions**, unless otherwise stated, were conducted among a nationally representative sample of 5,629 respondents aged 18+ in France (1,391), Germany (1,396), Italy (1,424), and Poland (1,418).

Key Findings



There is **strong support** (90 percent or higher) across respondents in all four countries (France, Germany, Italy, and Poland) **for regulating methane emissions in the oil and gas industry**, by reducing leaks, establishing equipment standards, and applying regulatory measures to EU suppliers.



Less than half of respondents across all countries (42 percent) recognize that **methane is the largest component of natural gas**, fewer (17 percent) were aware methane makes up more than 80 percent of natural gas. Youth respondents in Italy (ages 18-29) and older respondents in Germany and Poland (ages 70+) were more likely to say that **methane is a major problem for the climate** compared to respondents from other age groups.



Support for methane regulations on EU suppliers remains high despite the introduction of a pricing mechanism for oil and gas with high emissions intensities (67 percent). Redistribution of this fee to low-income households increases support (70 percent).



Natural gas is strongly associated with 'heating and cooking' and 'fossil fuel,' whereas Methane is associated with 'Greenhouse gas' and 'Cows and other animals.' Word associations with 'Natural Gas' and 'Methane' differ by country. In Italy, Natural Gas and Methane are direct synonyms, and Methane is not associated with 'Greenhouse Gas'.

Attitudes Towards the EU Methane Regulation

90% of respondents support regulations on the oil and gas industry to prevent methane leaks, including nearly 90% that suggest similar regulations for EU suppliers.

Strong support for regulations on methane pollution in oil and gas industry

QUESTION 1

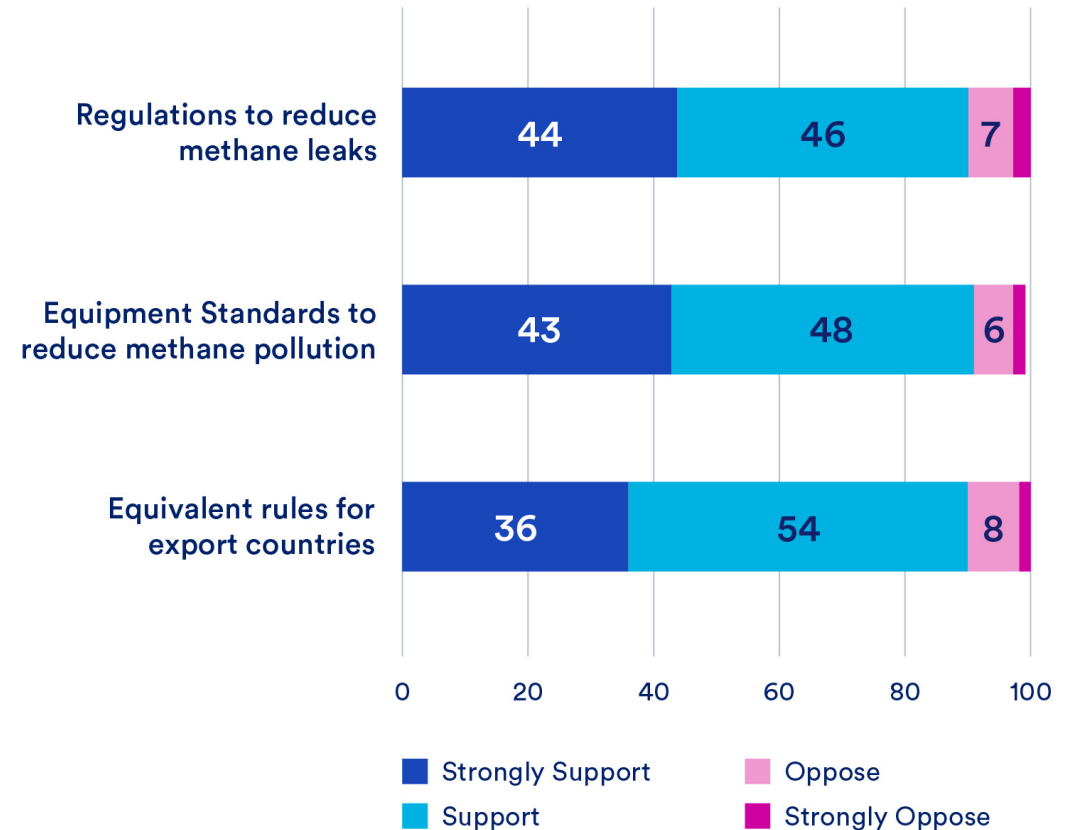
As you may know, the European Union is currently discussing regulations to require companies to reduce methane leaks from the oil and gas industry. Would you support or oppose regulations to reduce methane leaks?

QUESTION 2

Equipment is available on the market that can reduce and eliminate methane pollution. Do you support or oppose EU regulations that would require oil and gas companies to upgrade equipment to reduce methane pollution?

QUESTION 3

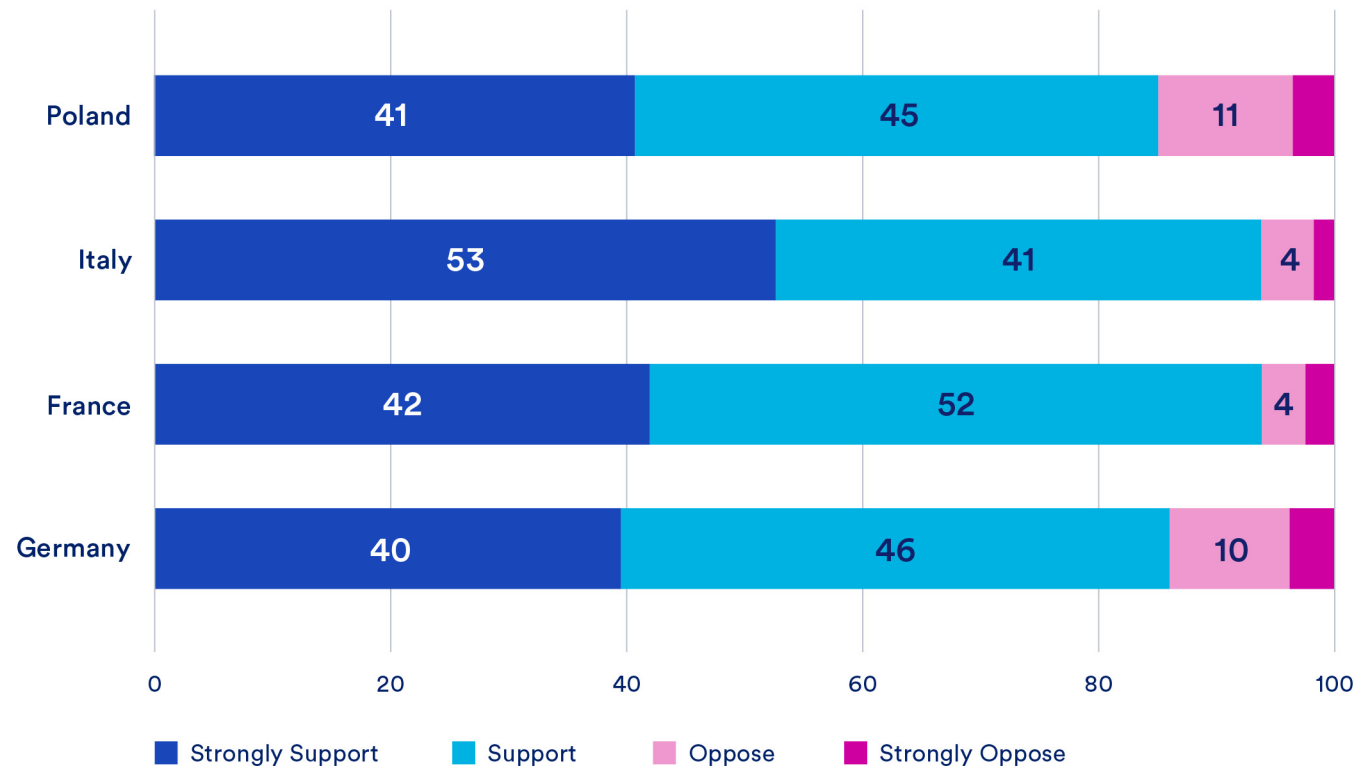
The European Union currently imports a large majority of its oil and gas from other countries. Would you support or oppose a regulation that requires countries who supply oil and gas to the EU to comply with the same rules as countries within the EU?



Strong support across all countries for **regulations to reduce methane leaks** in oil and gas industry

QUESTION

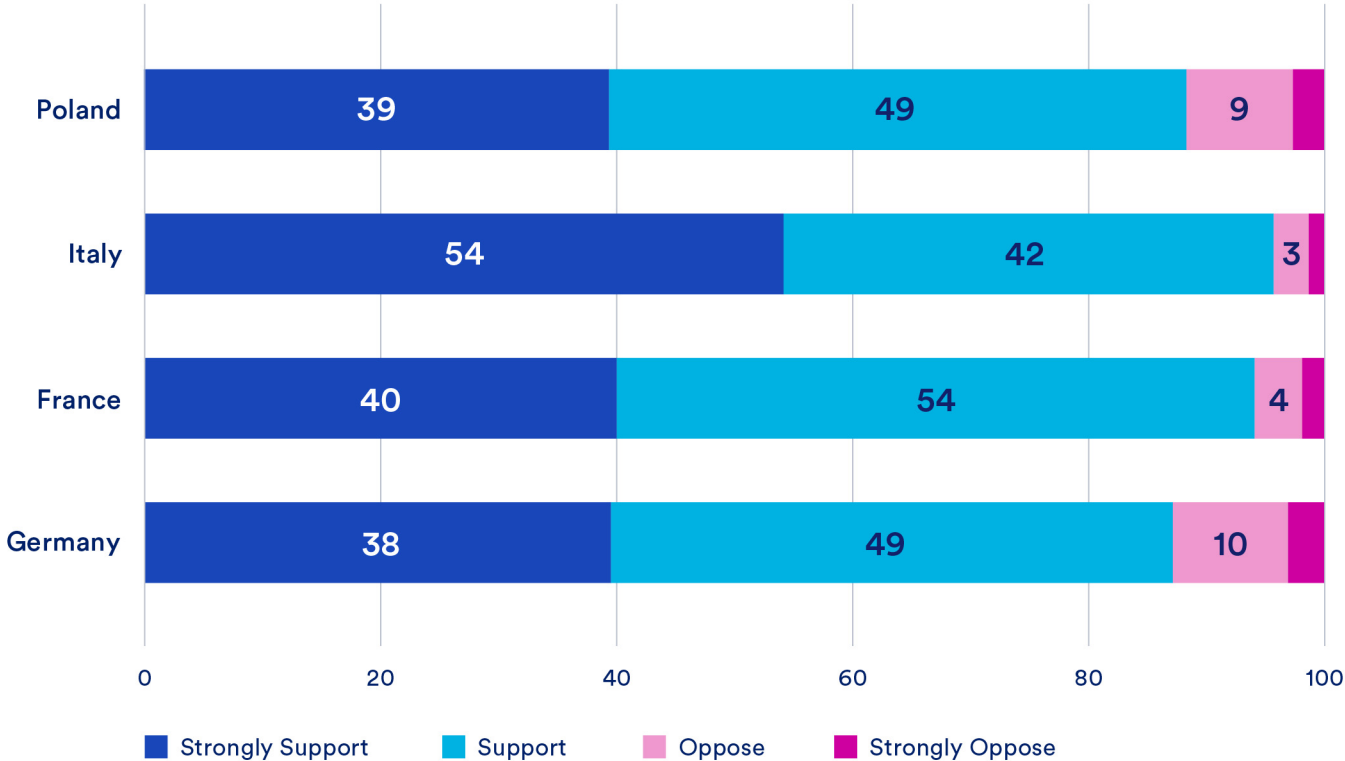
As you may know, the European Union is currently discussing regulations to require companies to reduce methane leaks from the oil and gas industry. Would you support or oppose regulations to reduce methane leaks?



Strong support across all countries for **equipment standards to reduce methane pollution** in oil and gas industry

QUESTION

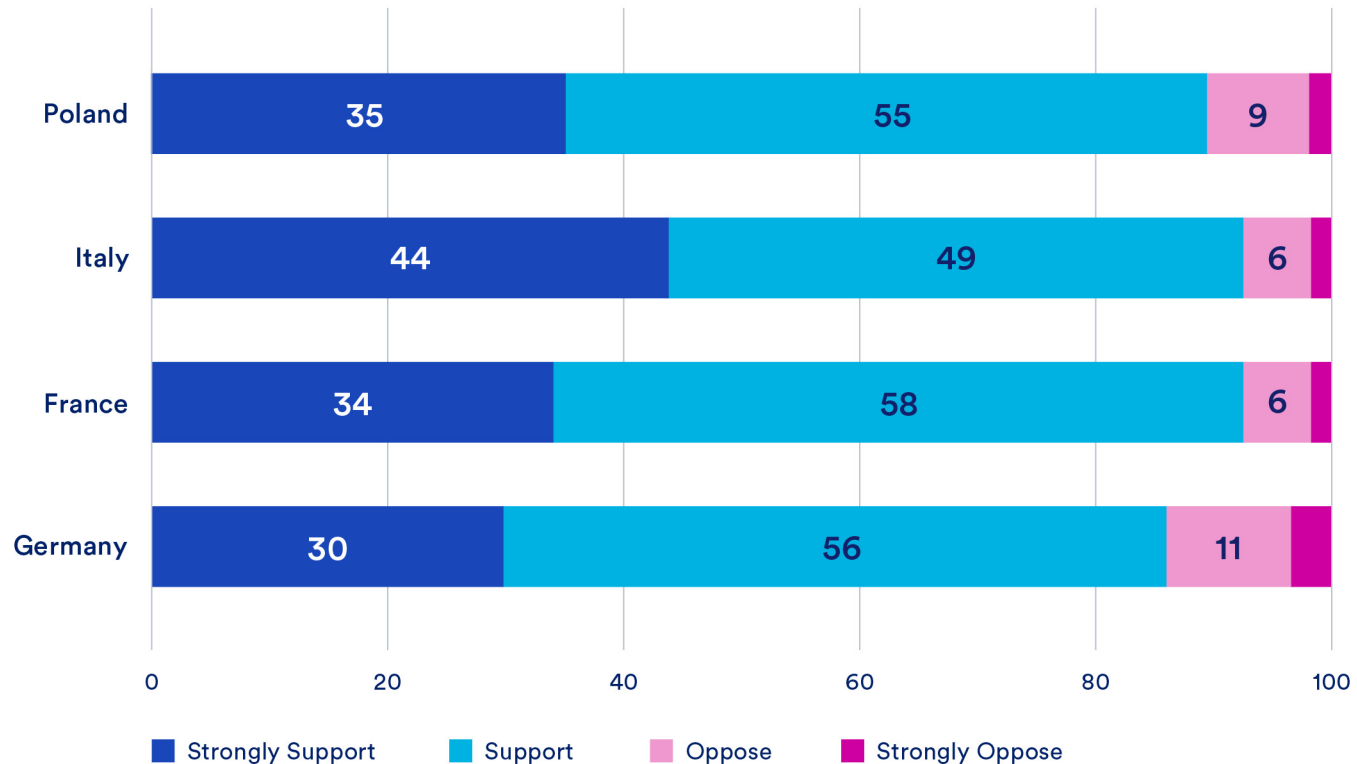
Equipment is available on the market that can reduce and eliminate methane pollution. Do you support or oppose EU regulations that would require oil and gas companies to upgrade equipment to reduce methane pollution?



Strong support across all countries for **EU supplier country obligations** to regulation methane emissions

QUESTION

The European Union currently imports a large majority of its oil and gas from other countries. Would you support or oppose a regulation that requires countries who supply oil and gas to the EU to comply with the same rules as countries within the EU?



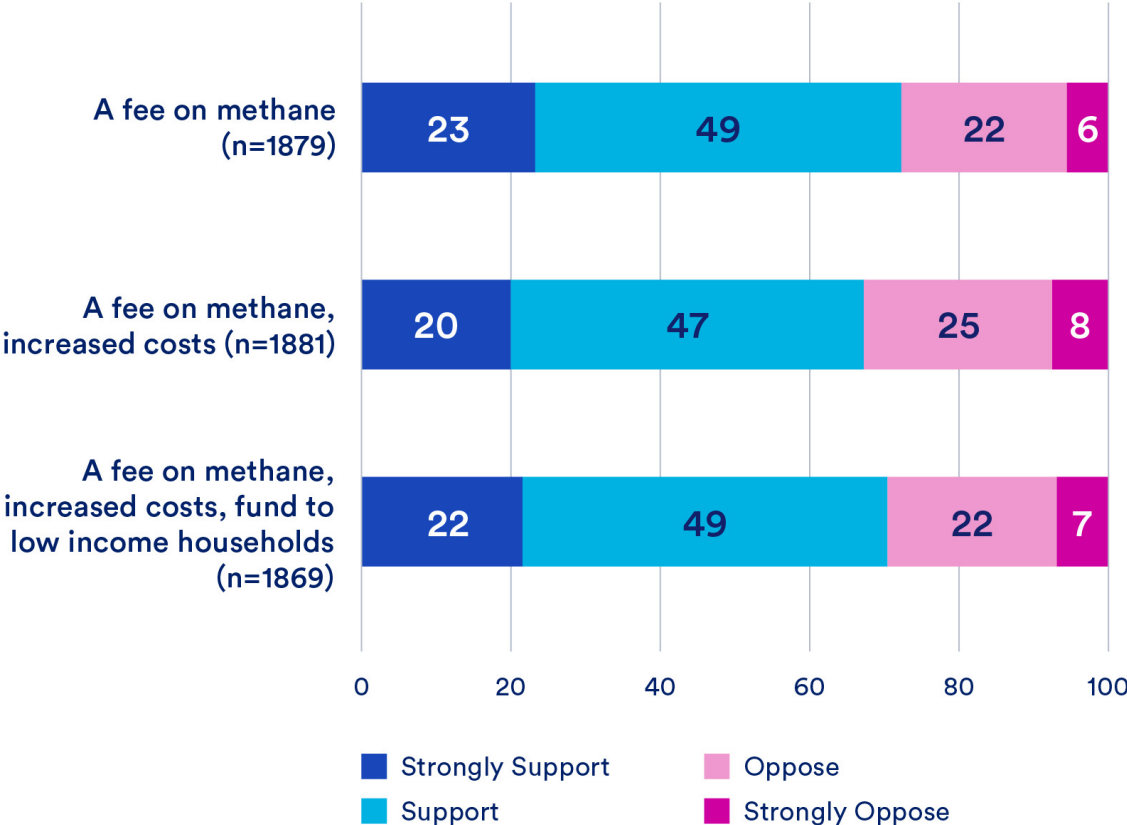
Support remains high despite a fee on oil and gas supplied to the EU with high rates of methane pollution

QUESTION

The European Union currently imports a large majority of its oil and gas from other countries.

Would you support or oppose:

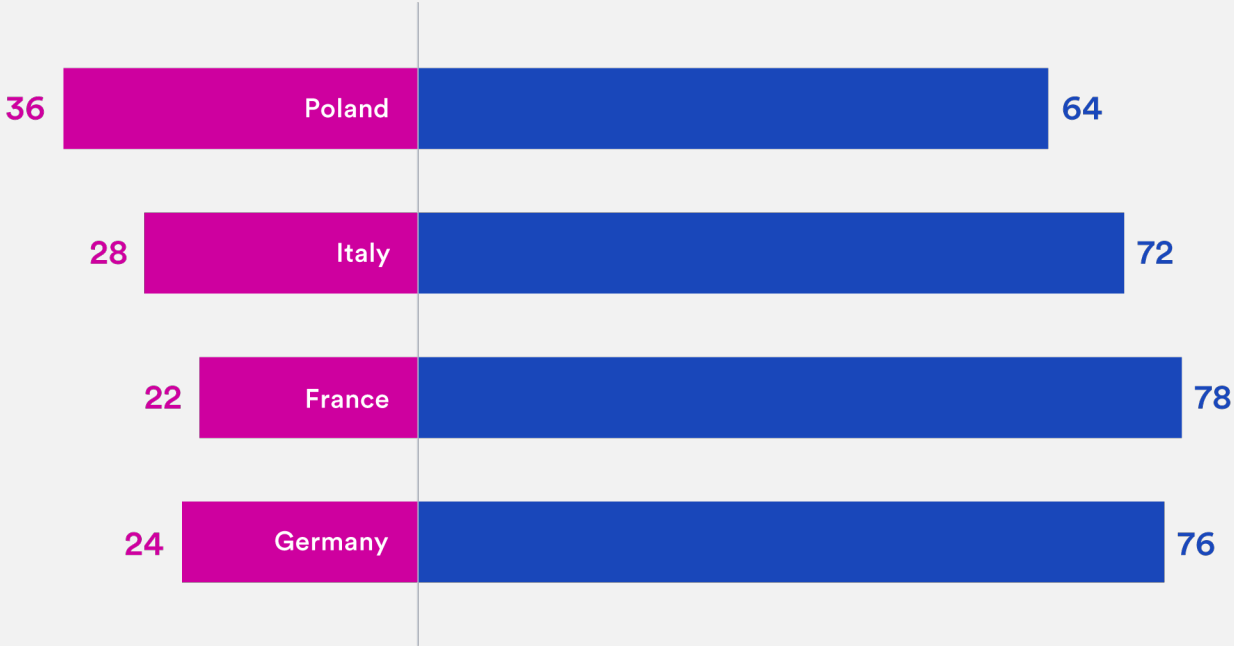
- A fee on oil and gas supplied to the EU from countries with high rates of methane emissions in their oil and gas production?
- A fee on oil and gas supplied to the EU from countries with high rates of methane emissions in their oil and gas production, even if that meant a small increase in the cost of energy to you?
- A fee on oil and gas supplied to the EU from countries with high rates of methane emissions in their oil and gas production, even if that meant a small increase in the cost of energy to you, and the funds generated from this tax would support low-income households?



Respondents support **strong regulatory action** over company commitments

QUESTION: Below are two statements about natural gas.
Which comes closest to your own view, even if neither is exactly right?

‘Because natural gas is a product that companies are selling, **they are already financially incentivized** to reduce methane leaks.’



‘Even though natural gas is a product that companies are selling, **strong regulations must be enacted** to ensure companies reduce methane leaks.’

Knowledge about Methane and Methane Impacts on the Climate

Only 42% of respondents recognized that methane makes up the largest percent of natural gas, but a majority of respondents (68%) recognize that methane concentration in the atmosphere is increasing.

Fewer respondents in Germany and France recognize methane is the main component of natural gas

QUESTION

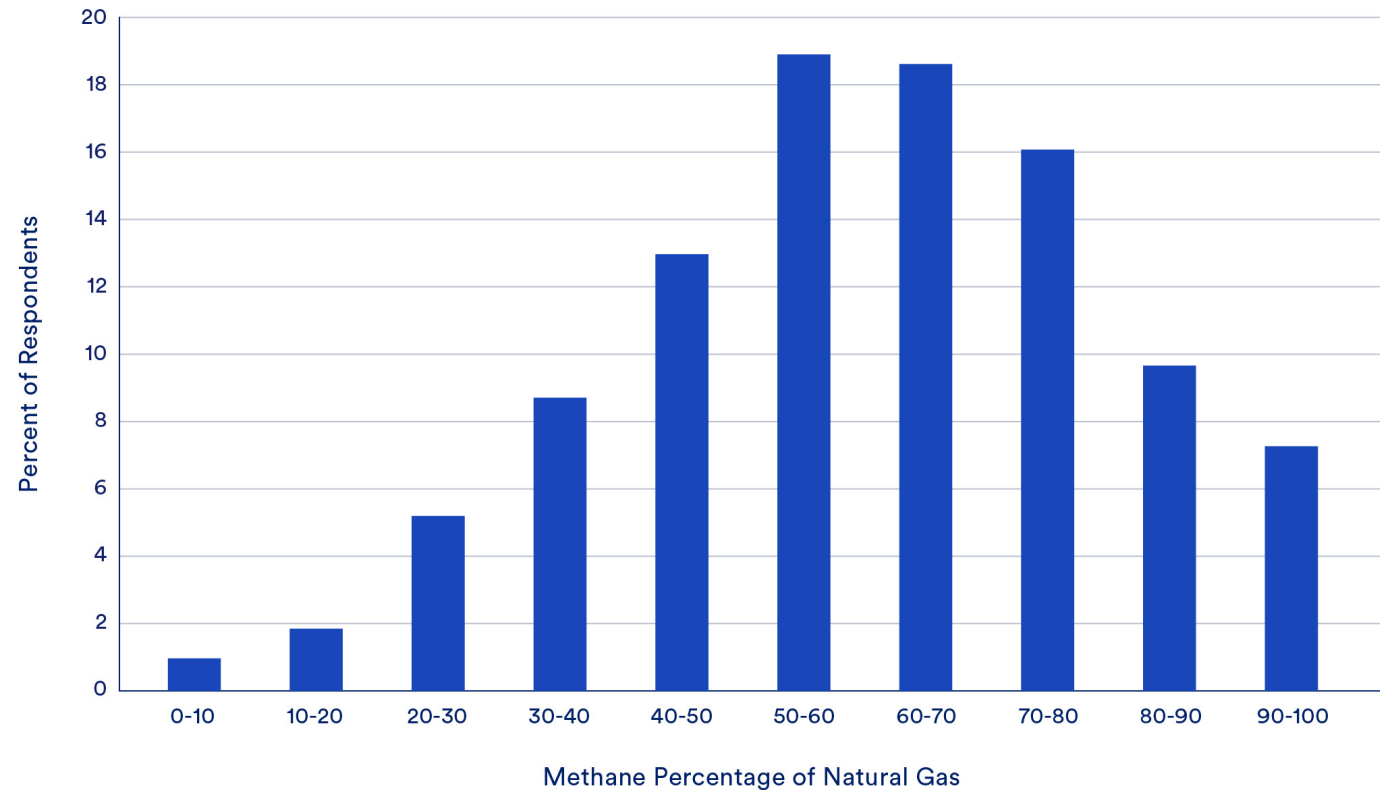
If you had to guess, which of the following gases makes up the largest percentage of natural gas?

	Germany	France	Italy	Poland	All
Oxygen	5%	15%	9%	6%	9%
Hydrogen	5%	10%	13%	8%	9%
Methane	38%	26%	49%	56%	42%
Carbon Dioxide	20%	18%	11%	15%	16%
Don't know	32%	32%	19%	16%	24%

Only 17 percent of respondents were aware that methane makes up more than 80 percent of natural gas

QUESTION

Methane is a component of natural gas which is used for electricity, heating, and cooking. If you had to guess, what percentage of natural gas do you think is made up of methane? Please click on the scale from 0% to 100% to place your answer.



A majority across Germany, France, Italy, and Poland **recognizes that methane concentration in the atmosphere has increased**

QUESTION

If you had to guess, in the last 10 years, do you think the concentration of methane in the atmosphere has increased or decreased, or stayed the same?

- Increased
- Decreased
- Stayed the same

	Germany	France	Italy	Poland	All
Methane in the atmosphere has increased	67%	69%	63%	71%	68%
Methane in the atmosphere has decreased	6%	8%	11%	8%	8%
The amount of methane in the atmosphere has stayed the same	27%	23%	25%	21%	24%

Majority of respondents across all four countries said methane poses a major problem for the climate, but a sizable percentage were unaware

QUESTION

“One contribution to the presence of methane in the atmosphere are fugitive methane emissions/leaks/is methane pollution in the oil and gas industry. If you had to guess, do you think XXX is a major problem or a minor problem for the climate.”

- Approximately 1/3 of the respondents from each country received a question asking about impact of ‘fugitive methane emissions’
- 1/3 of respondents from each country received a question asking about impact of ‘methane pollution’
- 1/3 of respondents from each country received a question asking about impact of ‘methane leaks’.

	Germany	France	Italy	Poland	All
Major problem for the climate	57%	63%	61%	66%	62%
Minor problem for the climate	15%	15%	20%	19%	17%
Not a problem for the climate	5%	3%	5%	3%	4%
Don't know	23%	20%	14%	11%	17%

This chart shows average response across three treatment groups.

Youth respondents in Italy, older respondents in Germany and Poland more likely to say that methane is a major problem for the climate

QUESTION

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- Approximately 1/3 of the respondents from each country received a question asking about impact of ‘fugitive methane emissions’
- 1/3 of respondents from each country received a question asking about impact of ‘methane pollution’
- 1/3 of respondents from each country received a question asking about impact of ‘methane leaks’.

	Age Groups					
	18-29	30-39	40-49	50-59	60-69	70+
All	62%	62%	61%	62%	61%	65%
France	63%	61%	64%	65%	62%	63%
Germany	48%	55%	55%	61%	54%	68%
Italy	69%	65%	61%	57%	57%	58%
Poland	66%	65%	64%	64%	71%	73%

This chart shows average response across three treatment groups for each age group.

Associations with the Terms 'Methane' or 'Natural Gas'

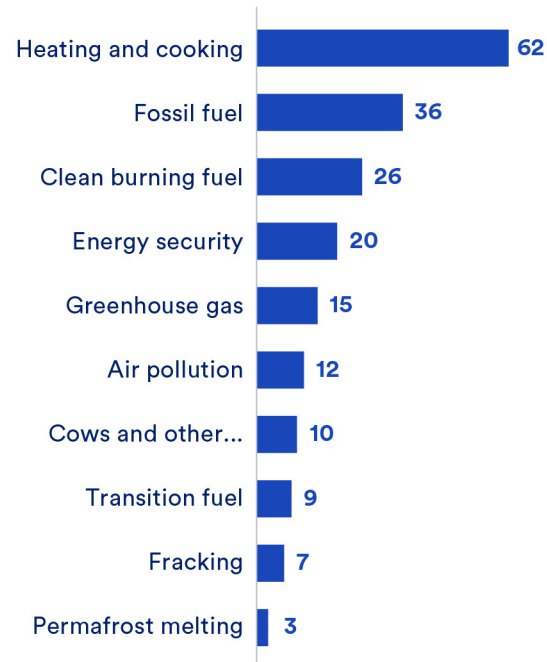
A plurality of respondents (36%) associate 'methane' with 'greenhouse gas' and 'cows and other animals', most respondents (62%) associate 'natural gas' with heating and cooking, but important distinctions exist across countries.

Natural gas is strongly associated with ‘heating and cooking’ and ‘fossil fuel,’ whereas Methane is associated with ‘Greenhouse gas’ and ‘Cows and other animals.’

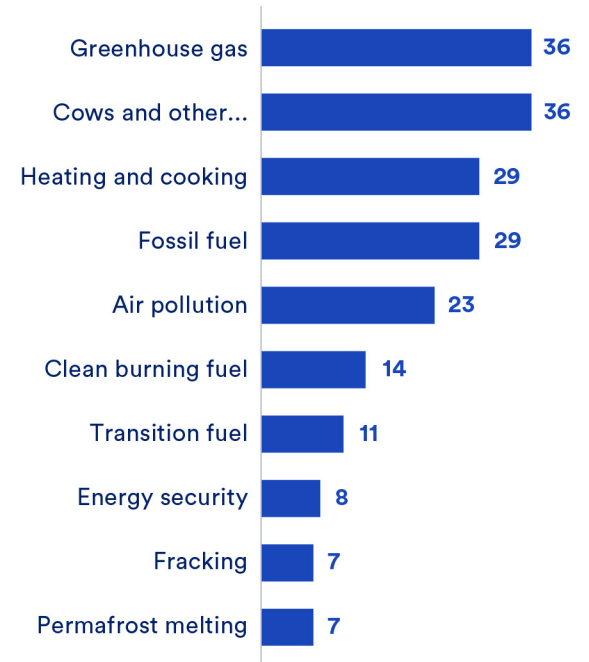
QUESTION

Which of the following phrases do you **most associate** with (‘Natural Gas’, ‘Methane’)?* Select two. (Natural gas and methane were randomly assigned to respondents. Approximately half of the respondents from each country received the question asking about ‘natural gas’ and half of the respondents received the question asking about ‘methane’.)

Associations with ‘Natural Gas’ (Percent)



Associations with ‘Methane’ (Percent)



Word associations with ‘Natural Gas’ and ‘Methane’ differ by country. In Italy, neither ‘natural gas’ nor ‘methane’ is closely associated with a greenhouse gas.

Associations with ‘Natural Gas’ (Percent)

	Germany	France	Italy	Poland
Air pollution	10	15	18	6
Clean burning fuel	23	28	32	19
Cows and other animals	4	16	16	2
Energy security	24	13	19	26
Fossil fuel	41	31	31	41
Fracking	18	7	2	3
Greenhouse gas	10	20	10	19
Heating and cooking	58	57	57	76
Permafrost melting	4	3	5	2
Transition fuel	8	10	11	7

Associations with ‘Methane’ (Percent)

	Germany	France	Italy	Poland
Air pollution	19	27	22	25
Clean burning fuel	7	12	25	11
Cows and other animals	55	54	14	22
Energy security	4	3	14	9
Fossil fuel	22	22	25	46
Fracking	16	4	2	4
Greenhouse gas	44	45	15	42
Heating and cooking	12	13	68	23
Permafrost melting	14	5	2	5
Transition fuel	6	15	12	11

About Clean Air Task Force (CATF)

Clean Air Task Force (CATF) is a non-profit organization working to safeguard against the worst impacts of climate change by catalyzing the rapid global development and deployment of low-carbon energy and other climate-protecting technologies. This is accomplished through research and analysis, public advocacy leadership, and partnership with the private sector. With more than 25 years of nationally and internationally recognized expertise on clean air policy and regulations and a fierce commitment to fully exploring all potential solutions, CATF is an environmental advocacy group with the bold ideas needed today to solve the climate crisis.

CATF's **Methane Pollution Prevention** team advocates for super pollution emissions reductions like methane around the world by supporting scientific research, promoting policy initiatives, encouraging the development of financial incentives for pollution controls, and championing and defending standards that can dramatically reduce emissions. Our goal is to catalyze deep, global reductions in methane and black carbon emissions to help stave off the risk of irreversible changes to our climate.

Questions?

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Thank you