

EU Methane Regulation (EUMR) survey

Germany

September, 2026



METHODOLOGY AND TECHNICAL SPECIFICATIONS

01



TECHNICAL SPECIFICATIONS

GENERAL OBJECTIVE

Measure attitudes, perceptions and levels of citizen support towards a regulation that requires the declaration of the origin of the oil and gas that the country acquires in the European Union, in order to understand the public legitimacy of the regulation and evaluate its impact on different communication frameworks



SAMPLE

- 1.000 cases per country, ensuring national representation



METHODOLOGY

- Quantitative methodology
- Non-probabilistic sampling design: quota control.



SURVEY DATA COLLECTION METHOD

- Online survey
- Structured questionnaire of 10 minutes average



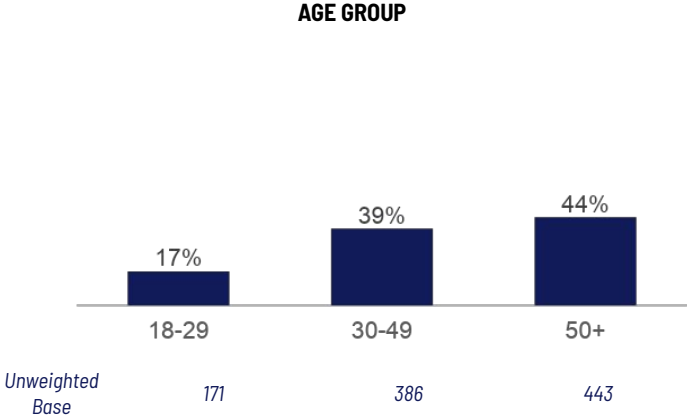
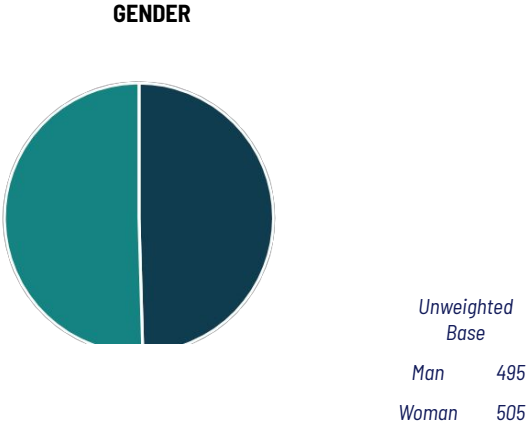
TARGET POPULATION

- Men and women aged 18 and older from all regions of the country.
- Sample frame: IIS Ipsos Panel



PROFILE: UNWEIGHTED BASE

(B: 1000, Total sample)



FINDINGS

02



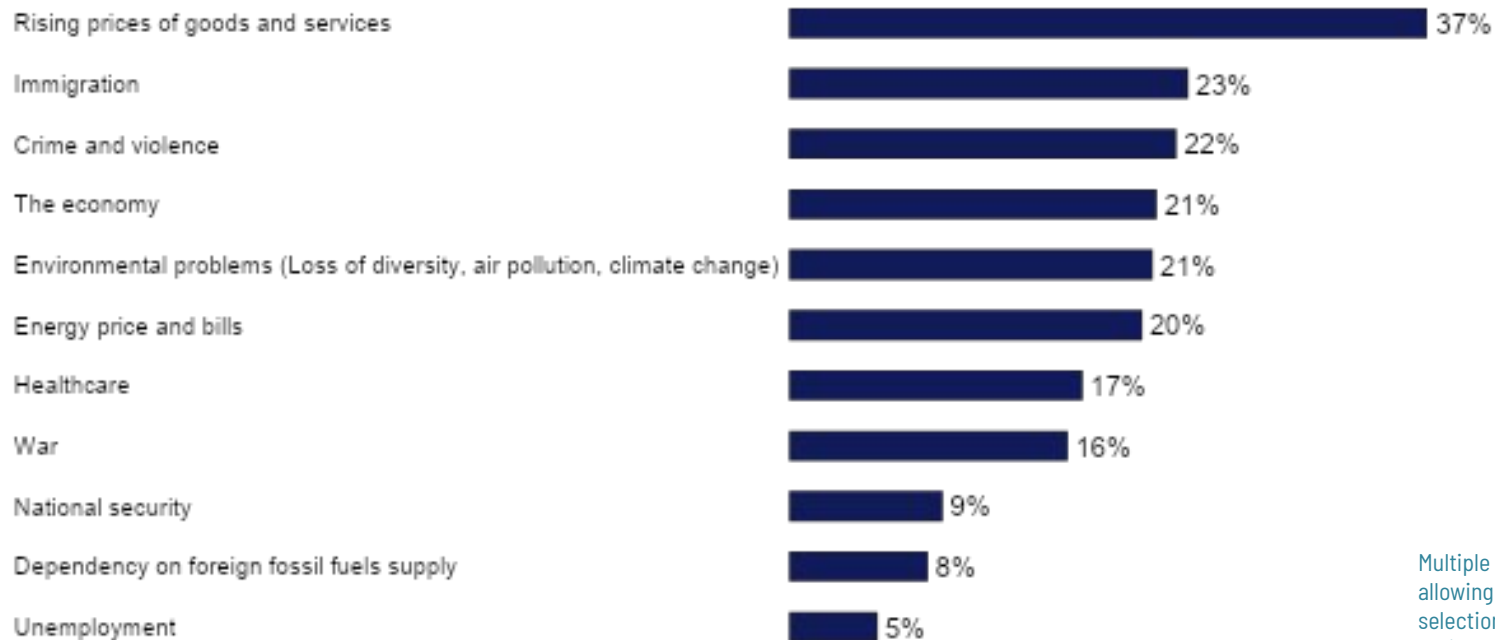
CONTEXT, POLITICAL IDENTITY, AND THE SUMMER



TOP CONCERNS IN GERMANY

Which three of the following are you most worried about in Germany today?

Base: Total sample, N=1.000



Multiple choice question,
allowing up to 2
selections from 11
options.



TOP CONCERNS IN GERMANY

Which three of the following are you most worried about in Germany today?

% MULTIPLE RESPONSE	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base:	1000	495	504	171	386	443
Rising prices of goods and services	37%	33%	41%	37%	41%	33%
Immigration	23%	24%	22%	16%	22%	27%
Crime and violence	22%	21%	23%	26%	22%	21%
The economy	21%	24%	18%	26%	22%	18%
Environmental problems (Loss of diversity, air pollution, climate change)	21%	21%	21%	23%	19%	22%
Energy price and bills	20%	23%	18%	21%	20%	21%
Healthcare	17%	10%	23%	12%	19%	18%
War	16%	16%	16%	16%	16%	16%
National security	9%	9%	9%	8%	8%	10%
Dependency on foreign fossil fuels supply	8%	11%	6%	4%	8%	10%
Unemployment	5%	7%	3%	11%	5%	3%

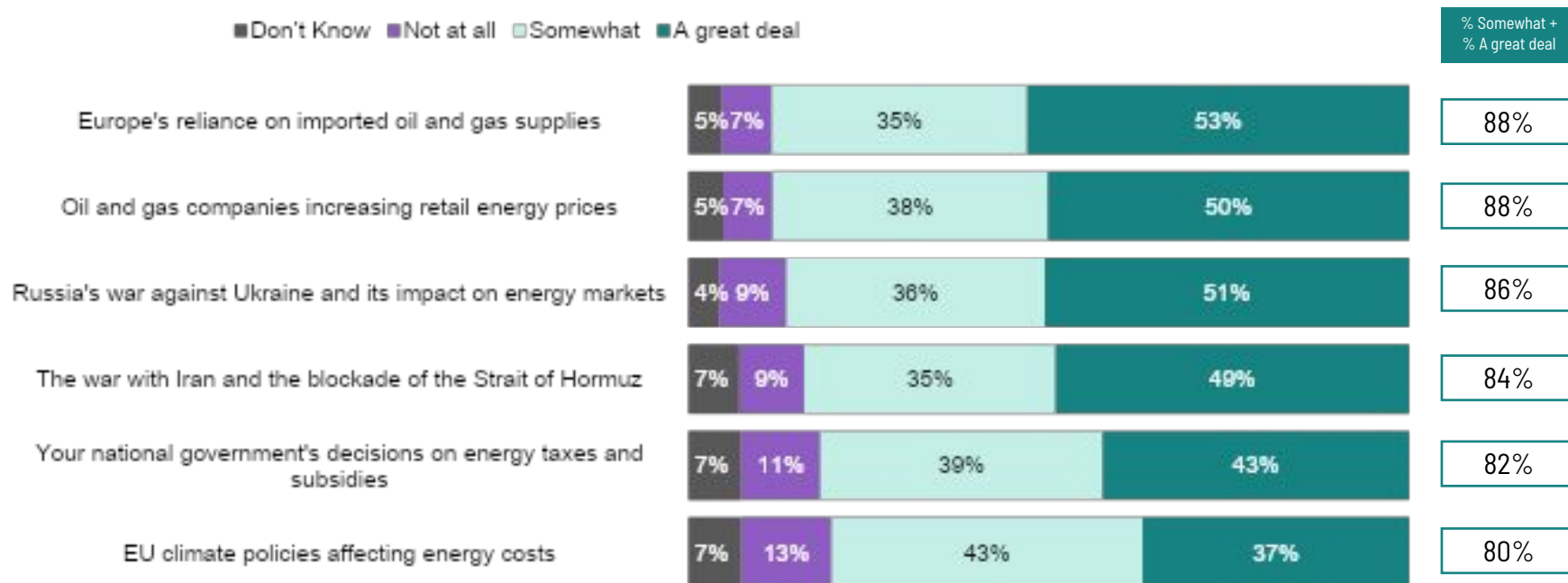
  Significantly higher/lower than other segments at the 95% confidence level.



PERCEIVED IMPACT ON ENERGY COSTS

Thinking about your household energy bill over the past year, how much, if at all, do you think each of the following has affected the amount you pay for energy?

Base: Total sample, N=1.000



PERCEIVED IMPACT ON ENERGY COSTS

Thinking about your household energy bill over the past year, how much, if at all, do you think each of the following has affected the amount you pay for energy?

Base: Total sample, N=1.000

% Somewhat + A great deal	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base:	1000	495	504	171	386	443
Europe's reliance on imported oil and gas supplies	88%	89%	88%	87%	89%	89%
Oil and gas companies increasing retail energy prices	88%	90%	86%	86%	91%	87%
Russia's war against Ukraine and its impact on energy markets	86%	88%	85%	91%	86%	85%
The war with Iran and the blockade of the Strait of Hormuz	84%	84%	84%	77%	83%	88%
Your national government's decisions on energy taxes and subsidies	82%	83%	81%	78%	83%	82%
EU climate policies affecting energy costs	80%	81%	79%	78%	82%	80%

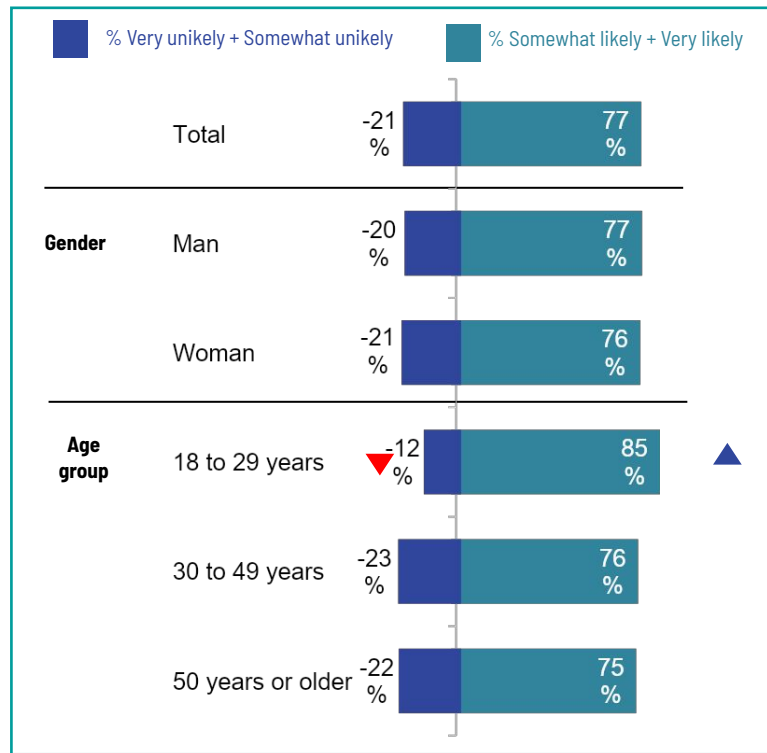
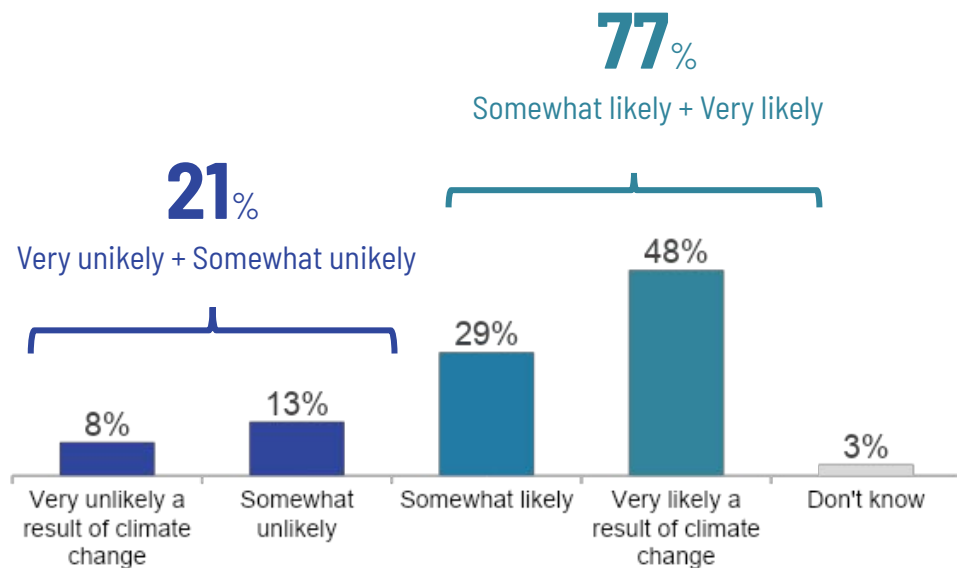
Valor significativamente maior ou menor entre os segmentos, com nível de confiança de 95%.



PERCEIVED LINK BETWEEN EXTREME HEAT AND CLIMATE CHANGE

This summer, Europe is experiencing record-breaking heat. Do you think this hot weather was, or was not, a result of climate change?

Base: Total sample, N=1,000

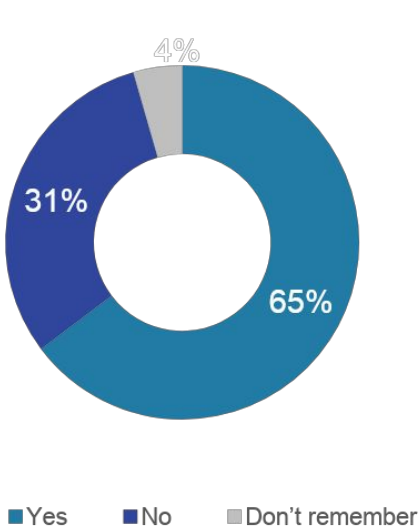


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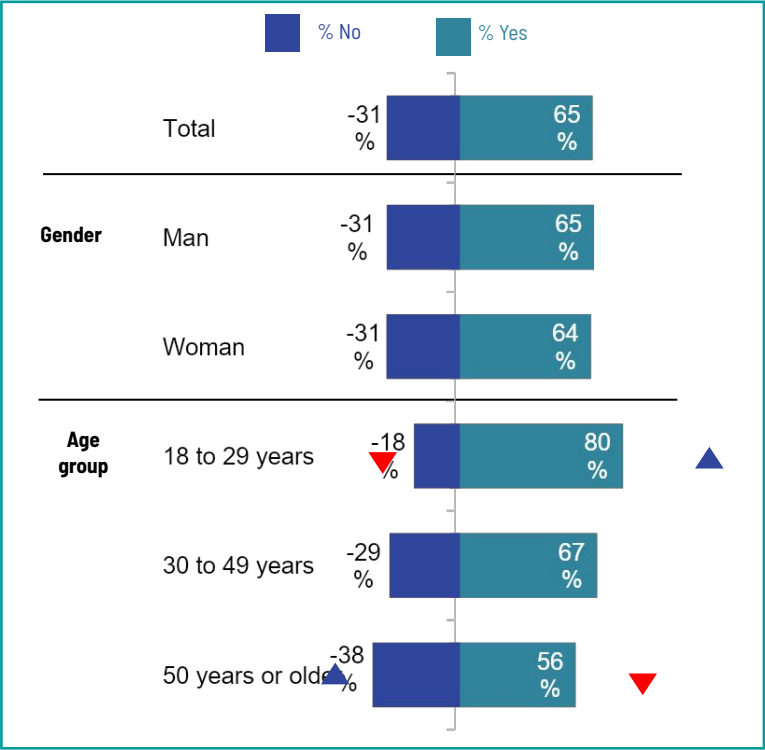
EXPERIENCE OF UNUSUALLY SEVERE WEATHER EVENTS

Have you personally experienced a heatwave or extreme weather event in the past two years that you felt was unusually severe?

Base: Total sample, N=1.000



65%
Yes, I have experienced a
heatwave or unusually
severe weather event.

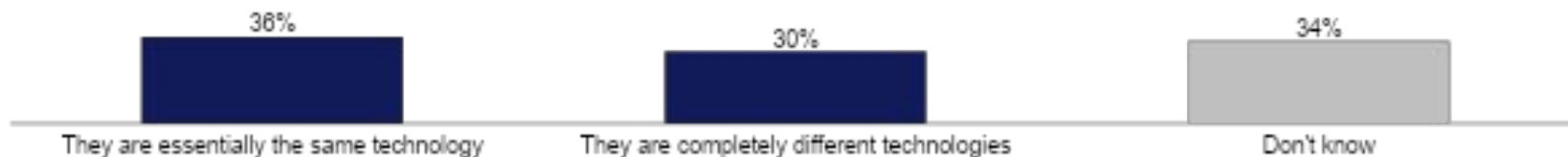


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KNOWLEDGE OF AIR CONDITIONING AND HEAT PUMP TECHNOLOGIES

As far as you know, are air conditioners and heat pumps different technologies, or essentially the same technology?

Base: Total sample, N=1.000



%	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base	1000	495	504	171	386	443
They are essentially the same technology	36%	42%	30%	29%	35%	40%
They are completely different technologies	30%	34%	26%	37%	32%	25%
Don't know	34%	24%	44%	34%	33%	35%

■ ■ Significantly higher/lower than other segments at the 95% confidence level.

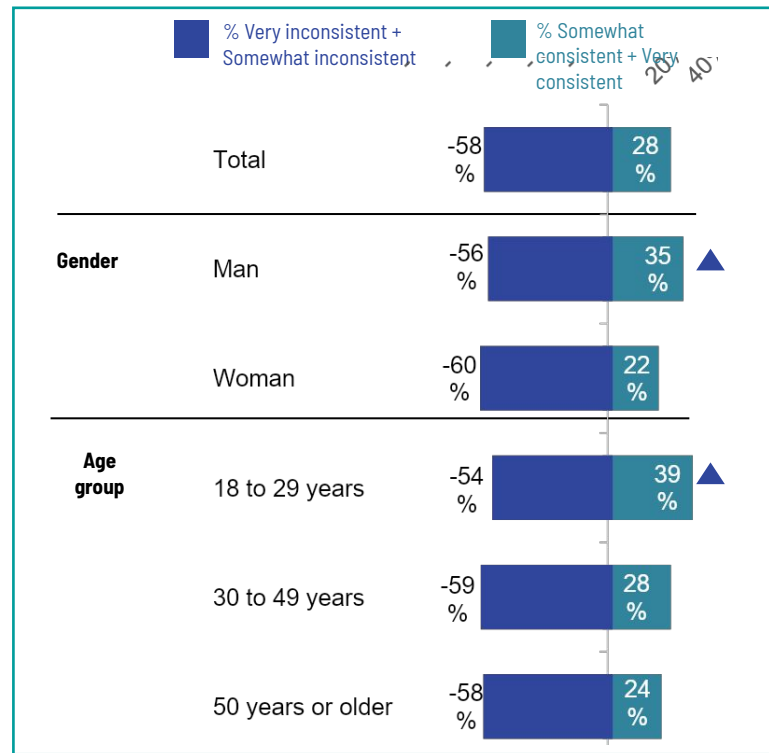
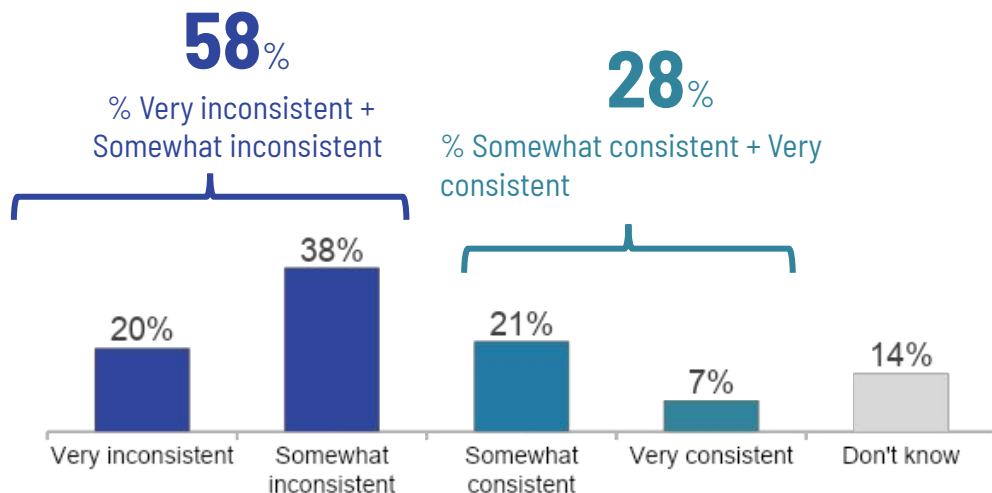


CONSISTENCY OF VIEWS ON AIR CONDITIONING AND HEAT PUMPS

Do you consider that position consistent or inconsistent?

Base: Total sample, N=1.000

"In fact, a heat pump uses the same basic technology as an air conditioner, just in reverse to heat a home, which is usually cheaper than gas. Some people support installing air conditioning in summer but oppose heat pumps for home heating"



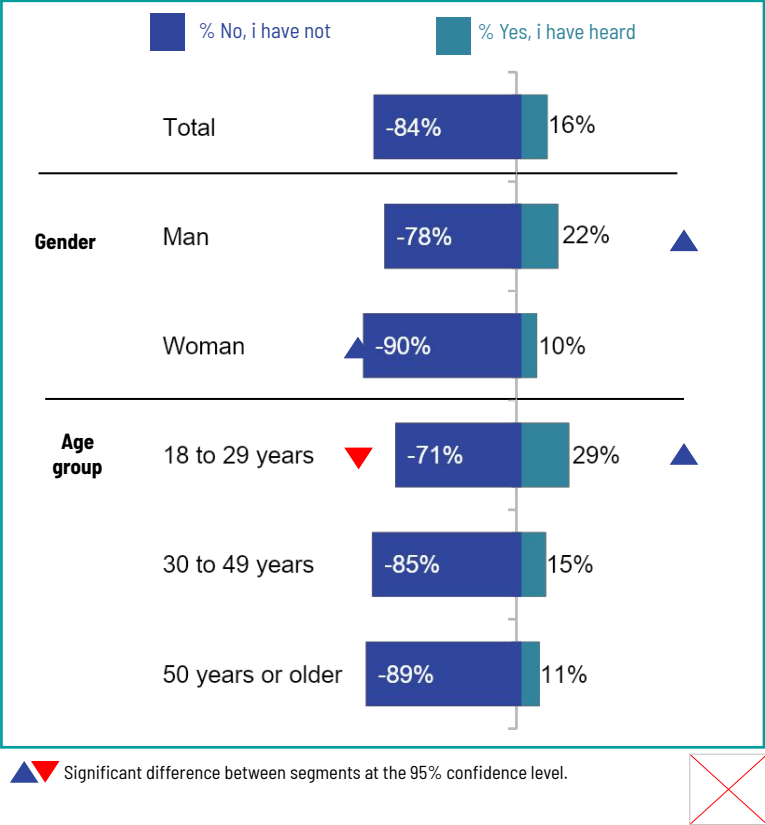
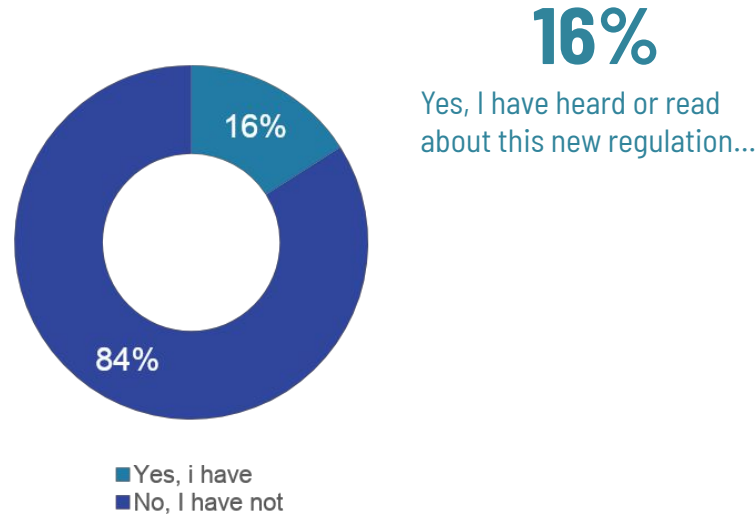
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METHANE COMPREHENSION AND BASIC AWARENESS AND SUPPORT OF EU LAW



AWARENESS OF EU METHANE REGULATIONS

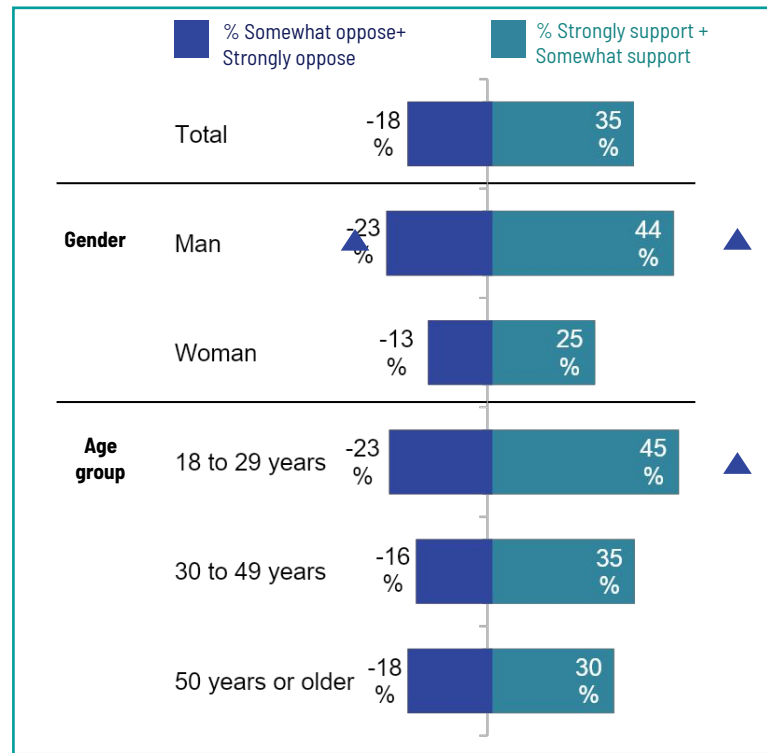
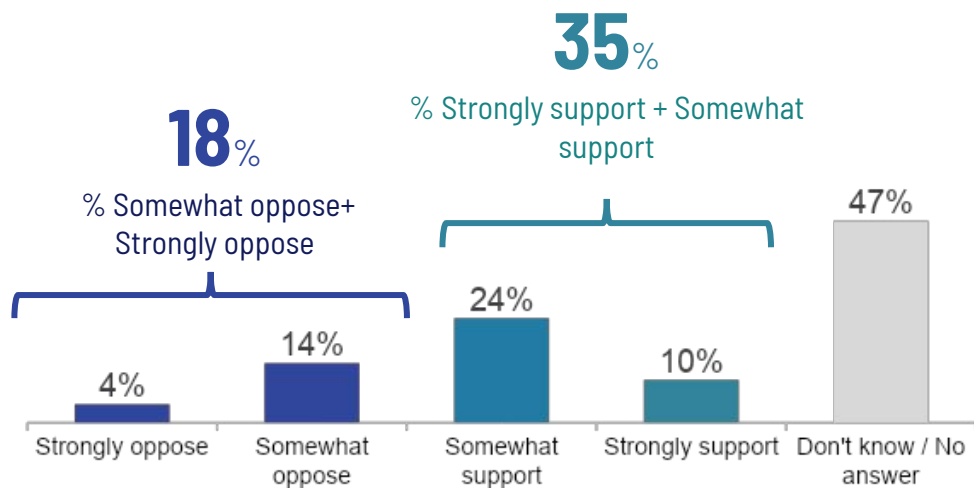
Have you heard or read about a new policy that requires countries supplying oil and gas to the EU to comply with the same methane rules as producers inside the EU? Base: Total sample, N=1.000



SUPPORT FOR THE NEW EU METHANE REGULATIONS

(About the policy) According to what you know

Base: Total sample, N=1.000

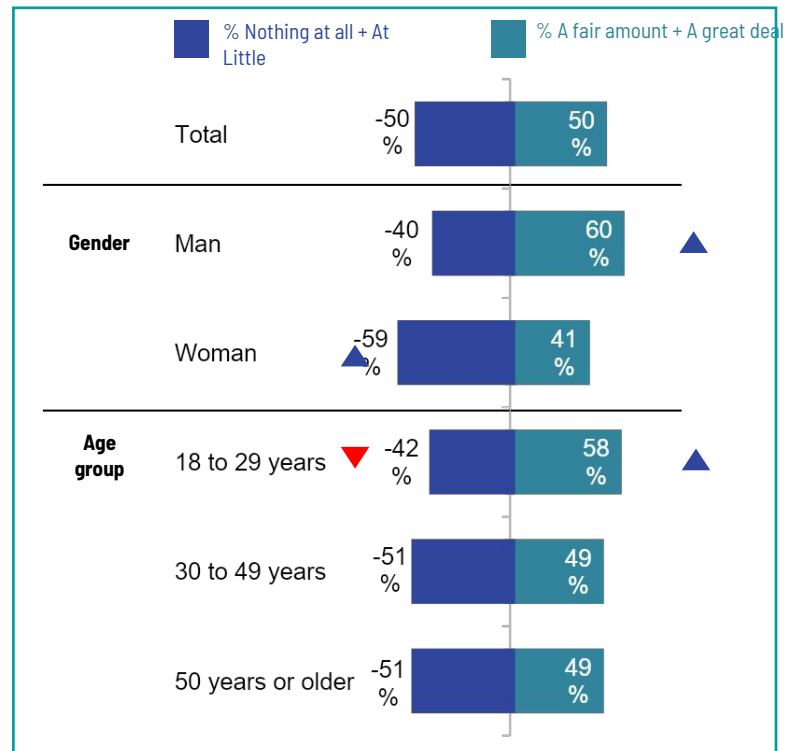
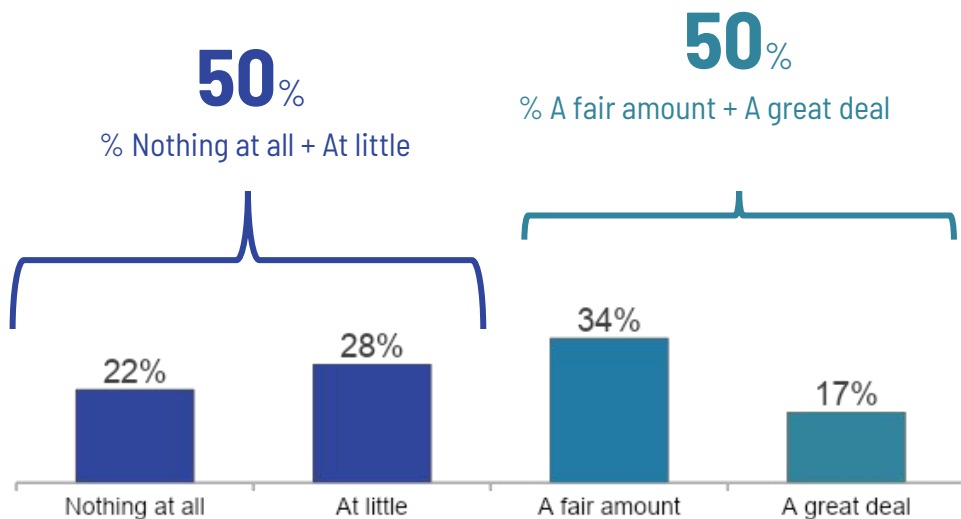


▲ ▼ Significant difference between segments at the 95% confidence level.

AWARENESS OF METHANE AS A CAUSE OF CLIMATE CHANGE

Before today, how much had you heard about methane as a cause of climate change?

Base: Total sample, N=1.000



▲ ▼ Significant difference between segments at the 95% confidence level.

KNOWLEDGE OF AIR CONDITIONING AND HEAT PUMP TECHNOLOGIES

As far as you know, which of these statements about methane are true?

Base: Total sample, N=1.000



% MULTIPLE RESPONSE	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base:	1000	495	504	171	386	443
Methane warms the planet more powerfully than CO2 but leaves the atmosphere much faster	45%	55%	36%	54%	47%	40%
Oil and gas exploration, use and transport cause methane emissions affecting the climate	34%	38%	30%	40%	34%	31%
Methane does not affect the climate at all	6%	8%	4%	5%	4%	7%
Don't know	31%	20%	42%	20%	31%	36%

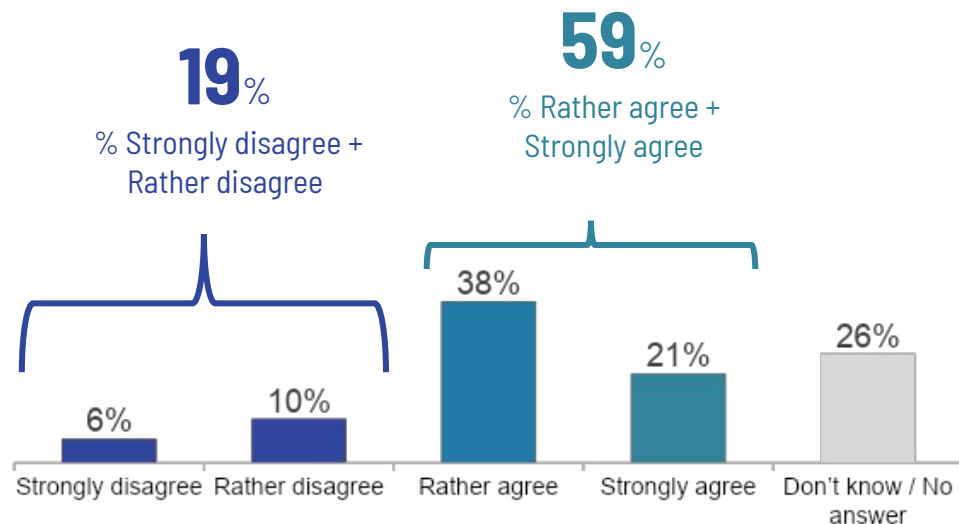
■ ■ Significantly higher/lower than other segments at the 95% confidence level.



ATTITUDES TOWARD ACTIONS TO REDUCE METHANE EMISSIONS

To what extent do you agree or disagree with actions taken to minimize methane emissions

Base: Total sample, N=1.000



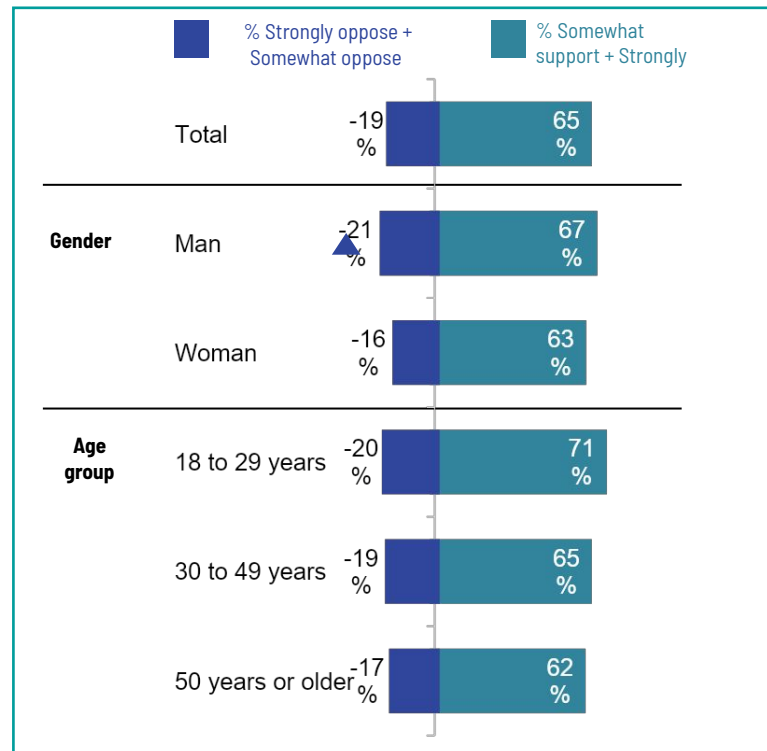
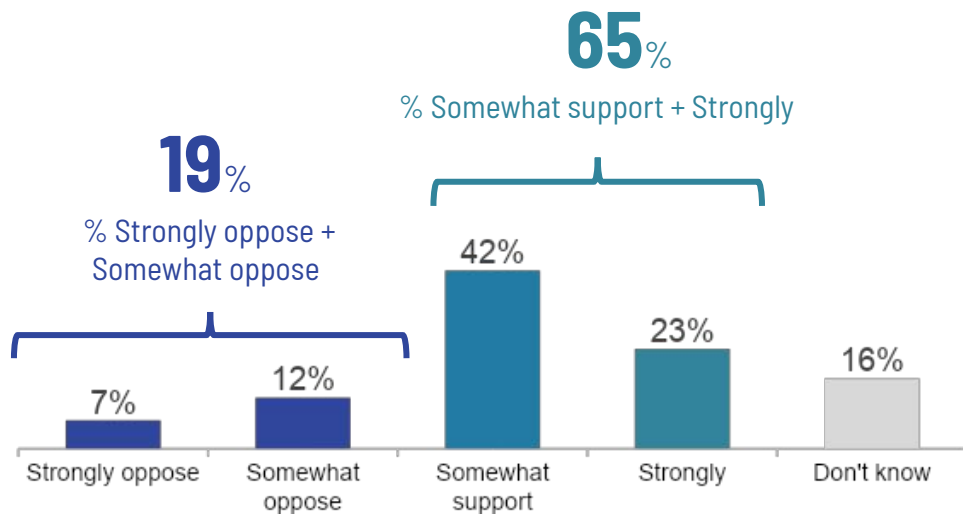
▲ Significant difference between segments at the 95% confidence level.

SUPPORT FOR TRACKING AND DISCLOSING THE ORIGIN OF IMPORTED OIL AND GAS

How much would you support or oppose Europe requiring that the origin of imported oil and gas be tracked down and published – so buyers can compare suppliers to their environmental record and suppliers can be held accountable?

Base: Total sample, N=1,000

"Methane traps more heat than CO2 in the short term, so cutting methane emissions can slow global warming more quickly than cutting CO2 alone. The EU has adopted a law making it mandatory for oil and gas companies to reduce avoidable methane emissions."



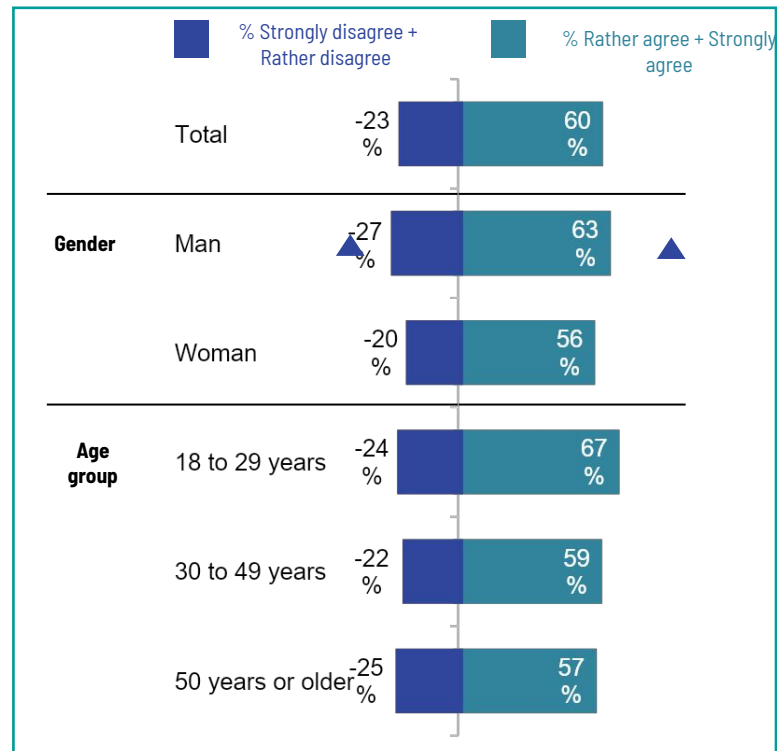
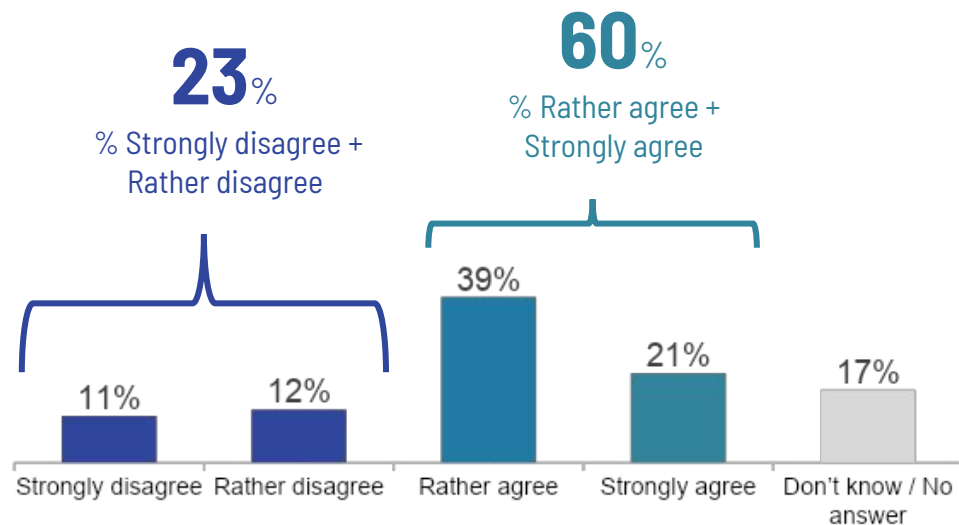
▲ Significant difference between segments at the 95% confidence level.

SUPPORT FOR GOVERNMENT IMPLEMENTATION OF THE LAW

To what extent do you agree or disagree that Germany's government should implement this law?

Base: Total sample, N=1.000

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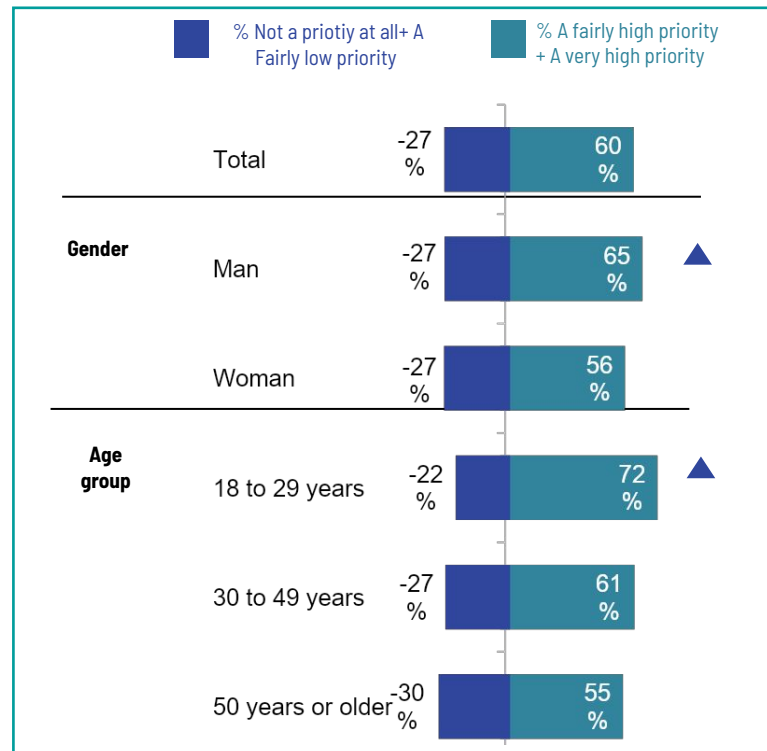
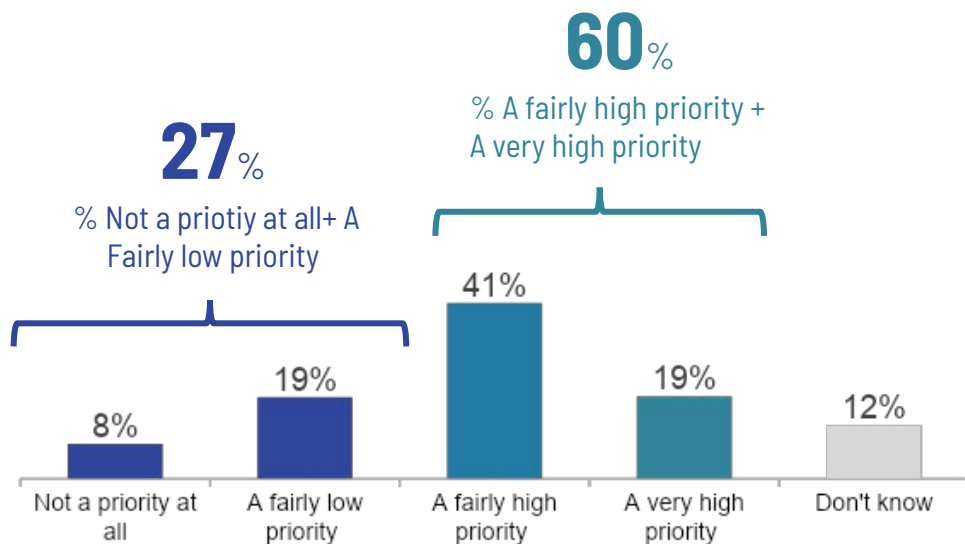


▲ ▼ Significant difference between segments at the 95% confidence level.

PRIORITY OF REDUCING METHANE EMISSIONS FROM OIL AND GAS

How much of a priority, if any, do you think reducing methane emissions from oil and gas should be for the EU?

Base: Total sample, N=1.000



▲ Significant difference between segments at the 95% confidence level.

ENERGY SECURITY & US SUGGESTIONS ON OIL PROVENANCE



PERCEIVED IMPACT OF REDUCING EUROPE'S DEPENDENCE ON IMPORTED OIL AND GAS

Imagine Europe reduced its dependence on imported oil and gas. Would this make Europe more safe, less safe, or make no difference?

Base: Total sample, N=1.000



%	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base:	1000	495	504	171	386	443
Make Europa safer	47%	50%	44%	48%	50%	45%
Make Europa less safe	17%	20%	14%	24%	14%	16%
Make no difference	24%	22%	26%	21%	23%	27%
Don't Know	12%	7%	16%	8%	13%	12%

■ ■ Significantly higher/lower than other segments at the 95% confidence level.



PREFERRED RESPONSE TO U.S. SUGGESTION ON EU METHANE POLICY

The United States has expressed concerns about the EU methane policy's and has suggested to weaken its rules on methane pollution from imported oil and gas and has suggested it could sell its gas elsewhere. What should Germany do

Base: Total sample, N=1.000



%	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base:	1000	495	504	171	386	443
Keep Europe's rules as they are, even if it risks tension with the United States	43%	49%	38%	46%	42%	43%
Accommodate some of US' asks, resulting in weakening/softening the rules somehow	30%	32%	29%	33%	32%	28%
Weaken the rules, not to risk losing the sympathy of US's government	7%	7%	7%	6%	6%	8%
Don't know	19%	13%	26%	15%	21%	20%

Significantly higher/lower than other segments at the 95% confidence level.



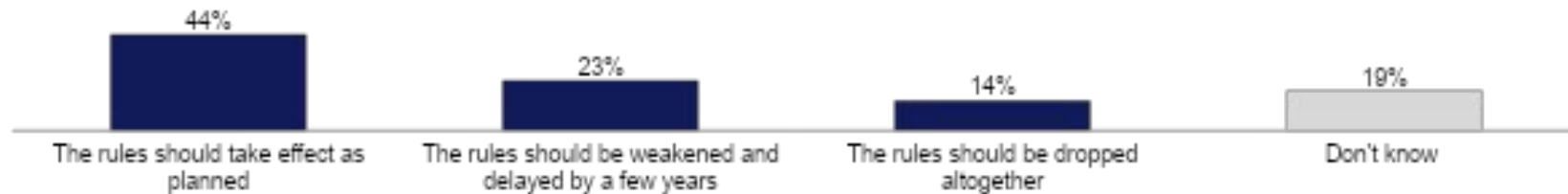
DECISIONS AND ACCOUNTABILITY



PREFERRED POSITION ON EU METHANE RULES

Some governments want to delay and weaken these rules because of energy security concerns. Others say they should take effect as planned. Which comes closer to your view?

Base: Total sample, N=1,000



%	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base	1000	495	504	171	386	443
The rules should take effect as planned	44%	46%	43%	54%	40%	44%
The rules should be weakened and delayed by a few years	23%	24%	22%	15%	25%	25%
The rules should be dropped altogether	14%	17%	11%	16%	15%	12%
Don't know	19%	13%	24%	15%	20%	19%

Significantly higher/lower than other segments at the 95% confidence level.



SUPPORT FOR PENALTIES FOR NON-COMPLIANCE WITH THE RULES

If a company selling oil or gas to Europe breaks these methane rules, should it face penalties, or not?

Base: Total sample, N=1.000



%	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base	1000	495	504	171	386	443
Yes, penalties should apply	53%	54%	52%	57%	55%	49%
No, warnings only	20%	20%	21%	20%	21%	20%
No consequences	13%	15%	11%	12%	11%	15%
Don't know	14%	11%	17%	11%	13%	16%

■ ■ Significantly higher/lower than other segments at the 95% confidence level.



IMPACT OF THE GOVERNMENT'S POSITION ON PUBLIC OPINION

If your national government voted to delay and/or weaken these methane rules, would that make your opinion of your government more favorably, less favorably, or make no difference?

Base: Total sample, N=1,000



%	Total	Gender		Age Group		
		Man	Woman	18 to 29 years	30 to 49 years	50 years or older
Base	1000	495	504	171	386	443
More favorably	18%	22%	15%	30%	18%	14%
No difference	42%	43%	40%	40%	38%	46%
Less favorable	23%	24%	22%	18%	27%	22%
Don't know	17%	11%	23%	13%	18%	18%

Significantly higher/lower than other segments at the 95% confidence level.



KEY FINDINGS



KEY FINDINGS

Strong support for methane transparency and accountability gives the regulation a solid legitimacy base, despite low prior awareness of the policy

Public legitimacy is driven by support for transparency and accountability. While only 16% had previously heard of the EU methane regulation, 63% support requiring imported oil and gas suppliers to meet the same methane standards as EU producers, and 65% support publicly disclosing the origin of oil and gas.

Climate concerns provide a favourable context for action. 77% believe recent extreme heat is linked to climate change and 65% report experiencing unusually severe weather events in the past two years, indicating widespread recognition of climate-related impacts.

Reducing methane emissions is viewed as an important policy priority. 60% say reducing methane emissions from oil and gas should be a high priority for the EU, 59% support actions to minimize methane emissions, and 60% support the German government implementing the law.

Support extends to enforcement and resilience against energy security arguments. 53% favour penalties for companies that break the rules, 44% want the rules to take effect as planned versus 23% who prefer delay and weakening, and 43% would keep Europe's rules unchanged even if this created tension with the United States.

¿So what?

Public support in Germany suggests the regulation enjoys broad legitimacy based on transparency, climate action and accountability, even though awareness of the policy itself remains limited.



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