

Kantar: How does the Netherlands view natural gas and natural gas production in the context of the energy transition? Research into the support and perception of natural gas production from small fields

Management summary

Insights

-The (self-reported) knowledge of the Dutch with regards to energy, natural gas and natural gas production appears to be at a reasonably high level. For example, the Dutch say they are (well) acquainted with renewable energy (86%) and fossil fuels (76%). The (self-reported) insight into the impact of different energy sources on the environment is also well estimated by the Dutch population; the vast majority think that solar energy and wind energy are good for the environment, 14% estimate that natural gas is (very) good for the environment and coal and petroleum are believed to be bad for the environment. Furthermore, almost everyone indicates that they are familiar with natural gas production in Groningen (93%) and almost three-quarters with natural gas production in small fields (73%). The knowledge gaps therefore seem to be better than expected.

-More Dutch people are positive rather than negative with their attitude towards natural gas production from small fields. One third of the Dutch are (very) positive about natural gas production from small fields, compared to about one in six who are (very) negative about it. The support for natural gas production in small fields thus appears to be slightly greater than the support for natural gas production in general (where the impact of Groningen plays a major role). However, a relatively large group adopts a neutral attitude to answer many questions and a significant number consistently state “don’t know”. For example, nearly two in five are neutral about natural gas production from small fields and more than a tenth say they do not know.

-The reason for most Dutch people to have positive view of natural gas production from small fields is to not be dependent on imported natural gas (81%). People also think of less damage when it comes to small fields (compared to Groningen) and it is recognized that the transition is a gradual process where solar and wind energy are not always sufficient. Dutch people who are more negative are more afraid that it can also lead to risky earthquakes (87%) and think it is bad for the ground.

-The Dutch are generally positive about offshore natural gas production (54%) and less positive about natural gas production from other fields onshore (24%). 56% also agree that natural gas production is better offshore than onshore. The Dutch are also positive about the reuse of existing natural gas pipelines and infrastructure (67%). However, confidence in the parties/companies involved is somewhat on the low side; 38% of the Dutch have (very) little faith in local politics, 41% in the government and 51% in the companies that produce natural gas.

-Finally, the Dutch generally recognize the difficult choices that have to be made during the energy transition (63%) and they understand that natural gas can serve as a safety net in the event of too little energy from renewable energy sources (60%). Only 13% think it is easy to achieve a natural-gas free Netherlands. However, people are divided about the impact of natural gas extraction in small fields.

Recommendations

-Re-use of natural gas pipelines and infrastructure offers opportunities. The majority of the Dutch are (very) positive about reusing existing natural gas pipelines and infrastructure. More attention to this aspect in communication can therefore be beneficial. Those who are more negative about this often think that there are safety risks due to wear and tear of the pipes. This picture could be adjusted with clear information.

-Of the various locations where natural gas can be produced, shift focus through more communication about natural gas production offshore as support for production offshore is the greatest. The Dutch are (much) more positive about natural gas production offshore than onshore. The group that is (much) more concerned about the climate is just as positive about production offshore as the group that has little or no concern about the climate. Less serious consequences for the environment and the built environment are seen here. By focusing communication more on natural gas production offshore, the current focus on the debate on Groningen may possibly be removed and support for natural gas production in the Netherlands could increase.

-Inform people that the consequences/risks of production from small fields are different than those of production in Groningen. Looking at natural gas production onshore, the Dutch are more positive about natural gas production in small fields than in Groningen. People who have a negative attitude towards natural gas production from small fields are concerned that risky earthquakes can also occur here and that it has a negative impact on the ecological and built environment. When the impact on the environment and built environment around small fields is small, it is important to strongly emphasize this. Is the chance of earthquakes here just as real as in Groningen? When these concerns are allayed, this could create public support among others. Our advice would be to focus a little more on certain groups, namely 18 – 34 years old and the less educated. They structurally indicate 'don't know' more often, which may indicate that they have less knowledge about the subject of natural gas production. However, these are also more difficult to reach groups; they are less interested in information about sustainability and energy.