



Global Methane Poll Wave 2: Understanding Public Opinion of Methane in the G7

France, Germany, United Kingdom and United States

Burson



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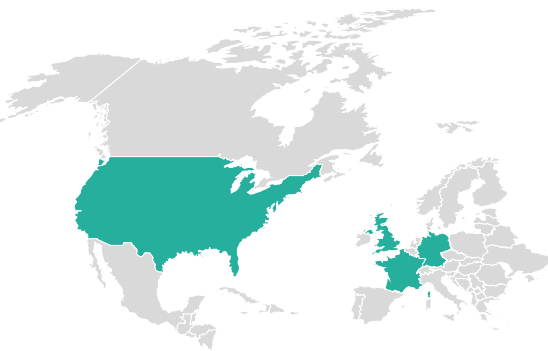


METHODOLOGY

Burson conducted a 10-minute online poll in 17 countries between January 13th and February 8th, 2024. In each country, we collected responses from people currently residing in the country who are 18 years of age or older and who have internet access. Weights were applied to age, gender, geography, and education to ensure collected samples were representative of adults 18+ who have internet access in each country.

In the G7, we collected no less than n=750
(MoE: ±3.58%)
respondents in the following countries:

- United States
- United Kingdom
- France
- Germany

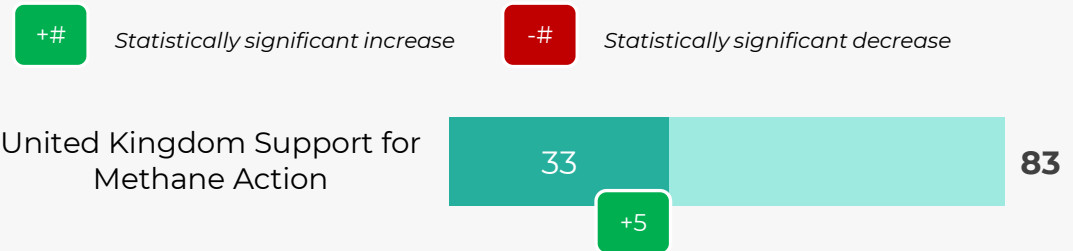


Tracking Wave-over-Wave Changes

Wave 1 data is available for comparison in the following countries in the G7 region:

- United States
- United Kingdom
- Germany

On questions where tracking data is available, wave-over-wave changes will be displayed in boxes as follows:



Indicates **+5pt gain** in UK strong support for methane mitigation since Wave 1

*If wave-over-wave movement is not shown, change is not statistically significant.

THE MARGIN OF ERROR AND HOW TO USE IT

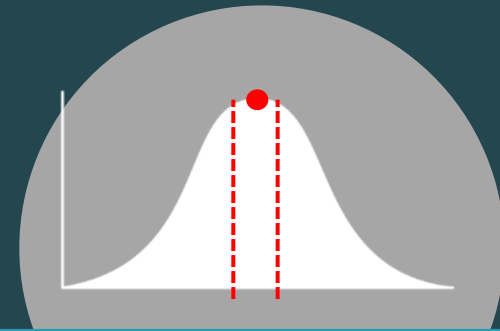
What it is

The margin of error (MoE) expresses the maximum expected range of how the total population would respond to a question.

What it means

The MoE tells us that the results of any given question or data point would fall within the range – above (+) or below (-) – indicated by the margin of error.

In the G7 region, all four countries have a margin of error of $\pm 3.58\%$



MARGIN OF ERROR
the margin where you can expect your results to fall

Here is a data point in red (50%). Given the results of the survey and the size of the question, the dotted lines encapsulate **where you can expect your answers to fall** if you were to conduct this study repeatedly on any given day.

HOW TO INTERPRET RESEARCH FINDINGS

This research is representative of adults 18+ who have access to the internet

- ✓ Levels of internet access vary widely in the countries we surveyed
- ✓ In countries with high internet penetration, our sample is closest to an accurate representation of gen pop
- ✓ In countries with **lower internet penetration, our sample is higher income, more educated, and more likely to live in and around cities** than the general adult population

Surveys were translated from English into 13 other languages by professional translators and subsequently back-translated into English for quality assurance and conformity.

- ✓ While thorough validation procedures were employed, including review by native speakers for cultural and semantic equivalence, readers should note that cultural variations in interpretation may influence response patterns across language groups.
- ✓ This is particularly relevant for questions assessing self-reported knowledge or familiarity, where cultural norms regarding knowledge claims may vary.

This data is an international study, representative of public opinion among the adult populations with internet access in 17 countries

✗ This data is *not* a global study; it is not meant to be representative of public opinion in all nations

TOTAL STUDY ≠ GLOBAL

Understanding the Survey: Key Questions and Topics



EXECUTIVE SUMMARY



KEY FINDINGS: G7

1

G7 countries prioritize economic issues over the environment (even as clean water is a top-5 issue in US, UK, and France).



2

Strong support for action on climate change is lower than in other regions, which report higher levels of climate change impact.



3

While methane is familiar to over 50% of people in the US and UK, understanding of its climate impact remains low, with a minority of Americans aware of its negative effects.



4

Still, there is **broad support for methane action in the G7** – though the support is less intense than that for general climate change action (except in France).



KEY FINDINGS: GLOBAL

1

Despite limited familiarity with methane, there is **widespread support around the globe for reducing methane emissions** – however, much of this support is lukewarm.



2

Less developed countries, where the impacts of the changing climate are felt most deeply, exhibit the **strongest support for climate and methane action**.



3

Economic issues top lists of national priorities, even in countries where people report experiencing extreme impacts from climate change.



4

Efforts to curb methane emissions from the **agriculture sector are likely to face the most resistance**, especially in agriculturally dependent economies.

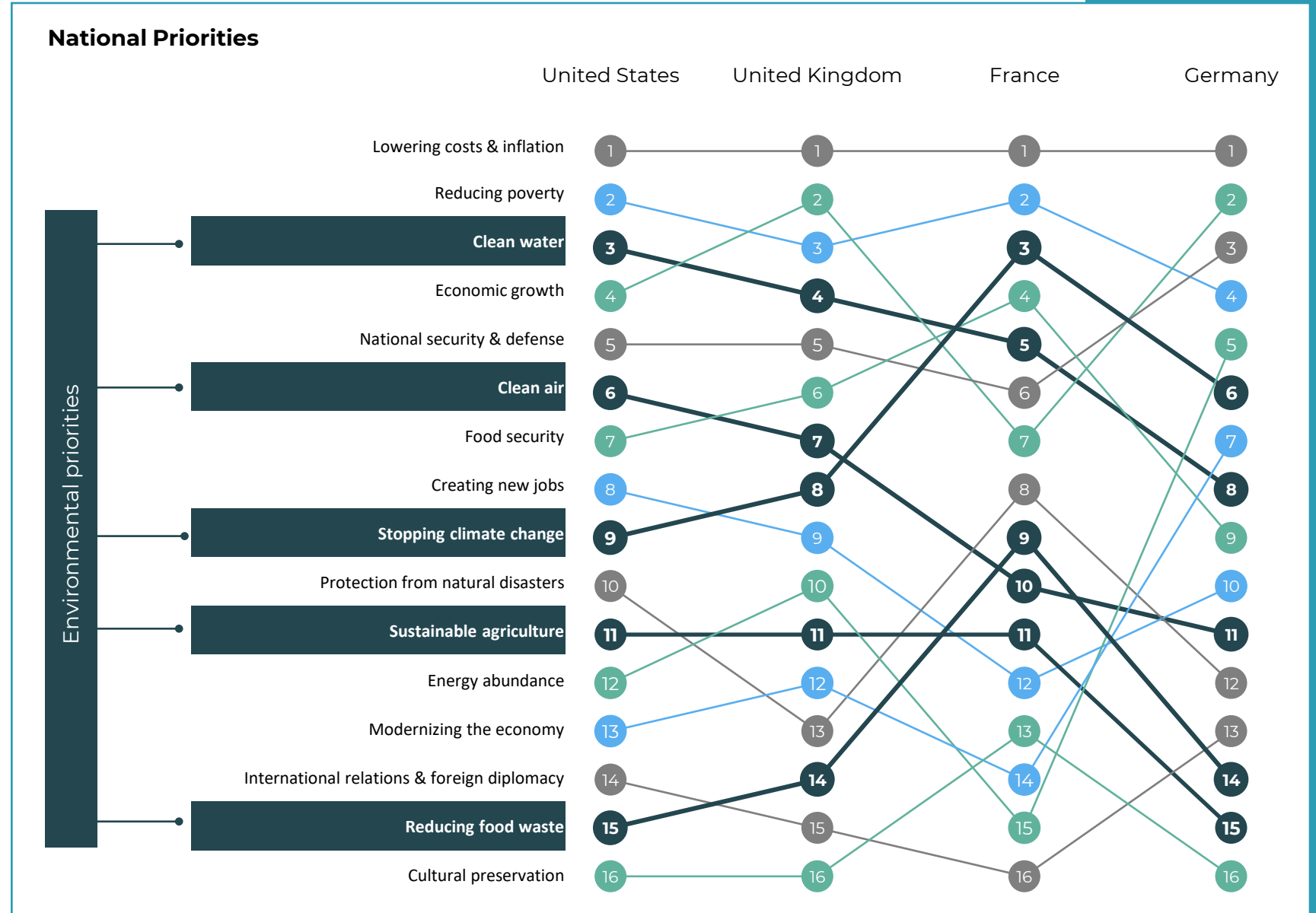


CLIMATE LANDSCAPE

G7 Region



While inflation dominates priorities across the G7, climate change ranks among the top 3 concerns in France; in the US, clean air shares this high level of concern, highlighting regional differences in environmental priorities



QMaxDiff. For each of the short lists you are shown, please mark which issue you personally find the MOST IMPORTANT FOR LAWMAKERS TO PRIORITIZE and which issue you personally find the LEAST IMPORTANT FOR LAWMAKERS TO PRIORITIZE for [your country].

When it comes to the environment, the G7 is more concerned about climate change generally than specific environmental issues

- **Issues relating to water and air quality** attract relatively high levels of intense concern – they are in the top 5 environmental concerns across G7 countries

- Germans are notably less concerned about climate change than other G7 countries, though it remains Germany’s top environmental concern



Q2. Below is a list of issues that may or may not affect people in their communities. Please review the list, and for each issue, please indicate how concerned you are about it in your own community, if at all.

1 in 5 Americans say climate change is having an extreme impact on their lives

Personal Impact of Climate Change

● 5 - Extreme impact on my life ● 4 ● 3 - Some impact ● 2 ● 1 - No impact

Extreme Climate Events Over the Past Year

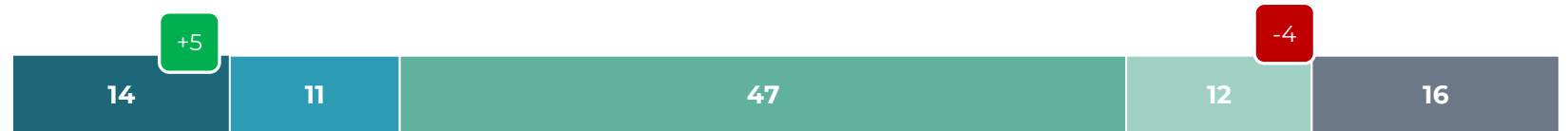
- Hurricanes Beryl, Helene, and Milton
- Hailstorms
- New Mexico and LA wildfires
- Droughts

United States



- Extreme heat
- Droughts
- Storm Henk, Isha, and Darragh
- Intense rainfall and flooding

United Kingdom



- Extreme heat
- Droughts
- Intense rainfall and flooding
- Coastal flooding
- Southern forest fires

France



- Extreme heat
- Droughts
- Intense rainfalls and flooding
- Christmas Floods

Germany

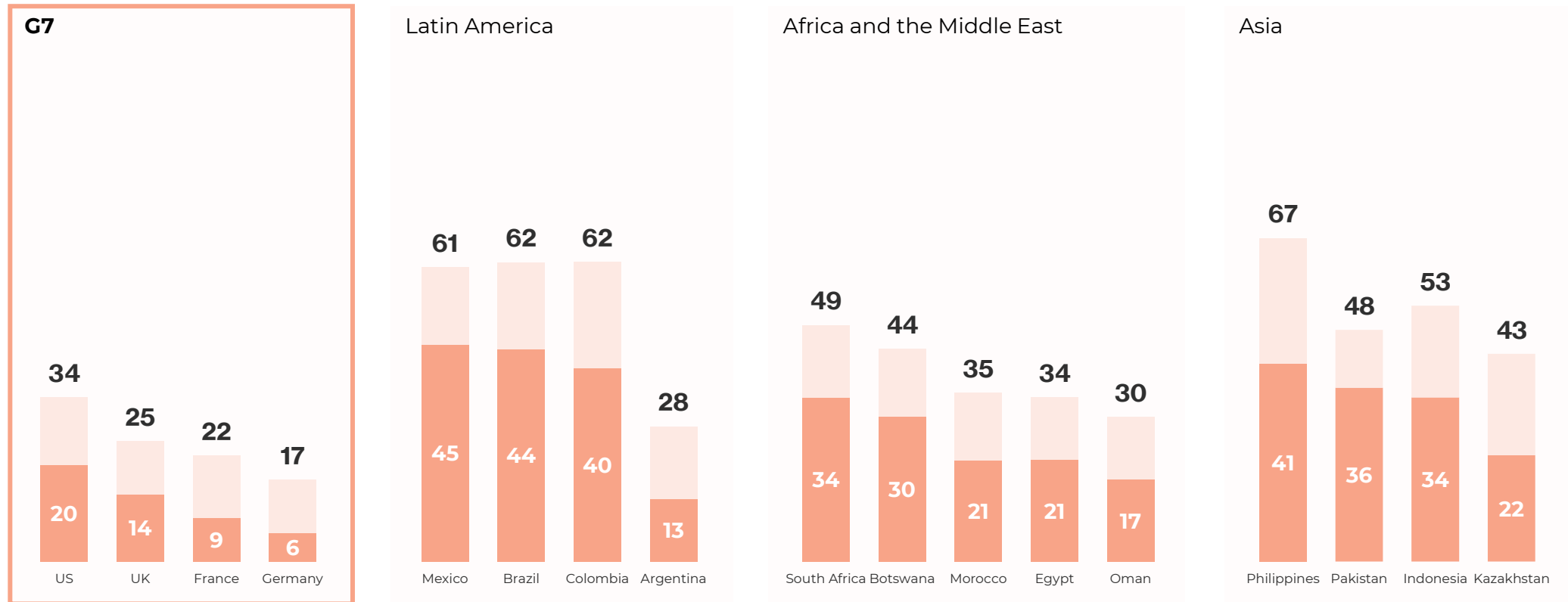


■ Significant change since Wave 1

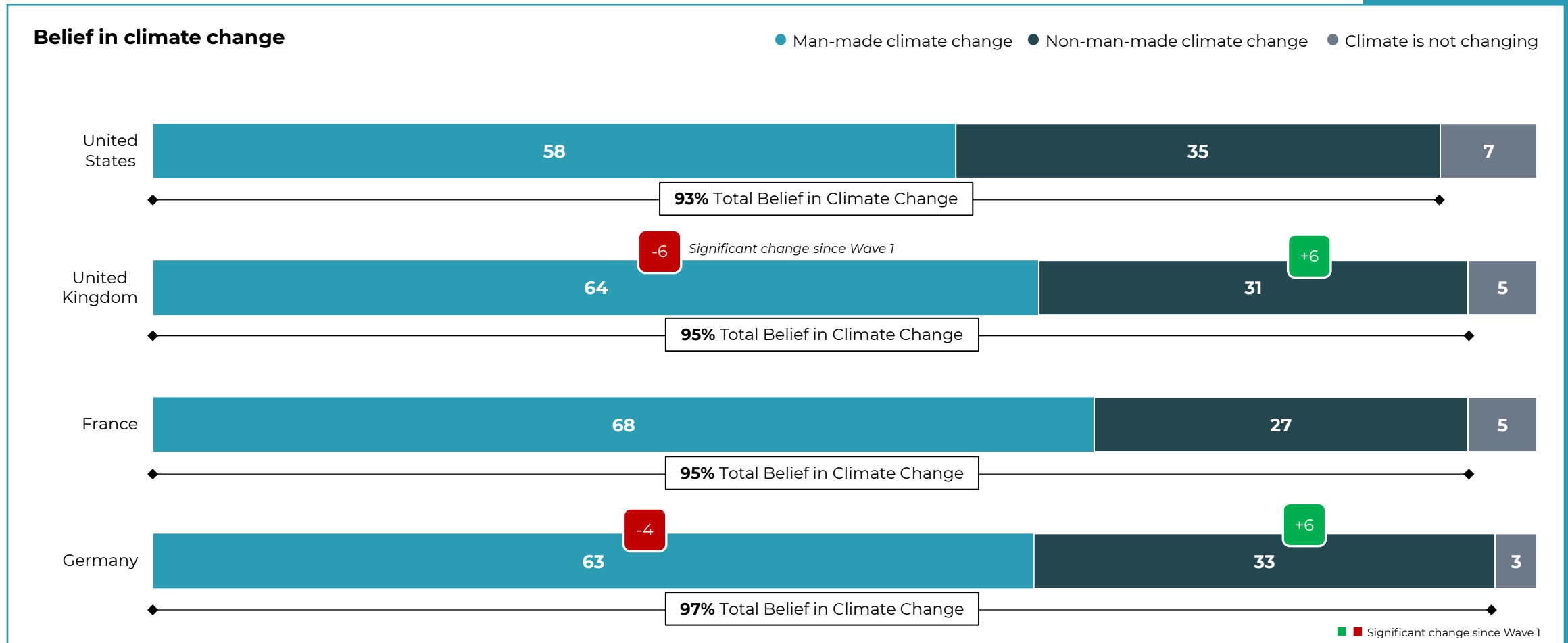
Global context: The G7 experiences the least climate change impact compared to the other regions, and only 17% of Germans are extremely or strongly impacted by climate change, the lowest of any country surveyed

Personal impact from climate change

● Extreme impact ● Strong impact **Total impact**



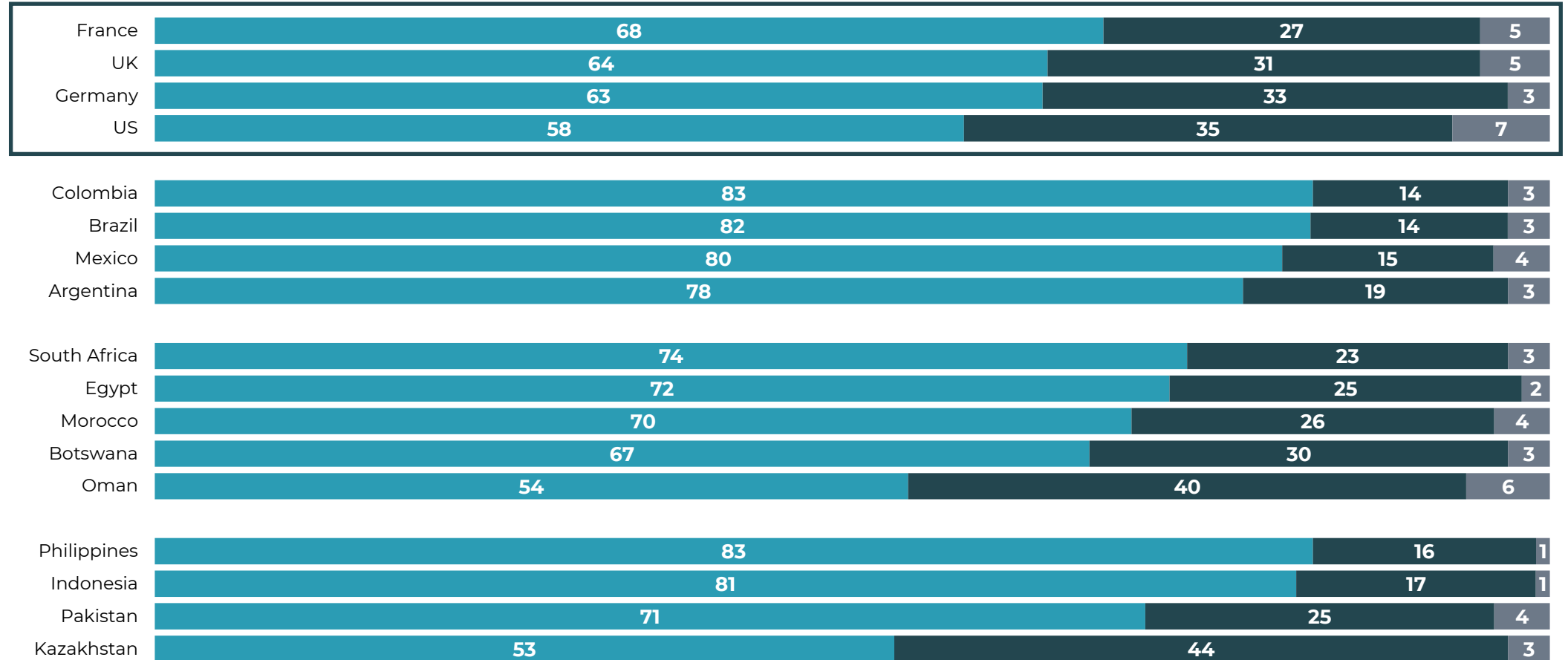
At most, 68 percent in the G7 believe in man-made climate change – but about a third think human actions have no impact on the climate



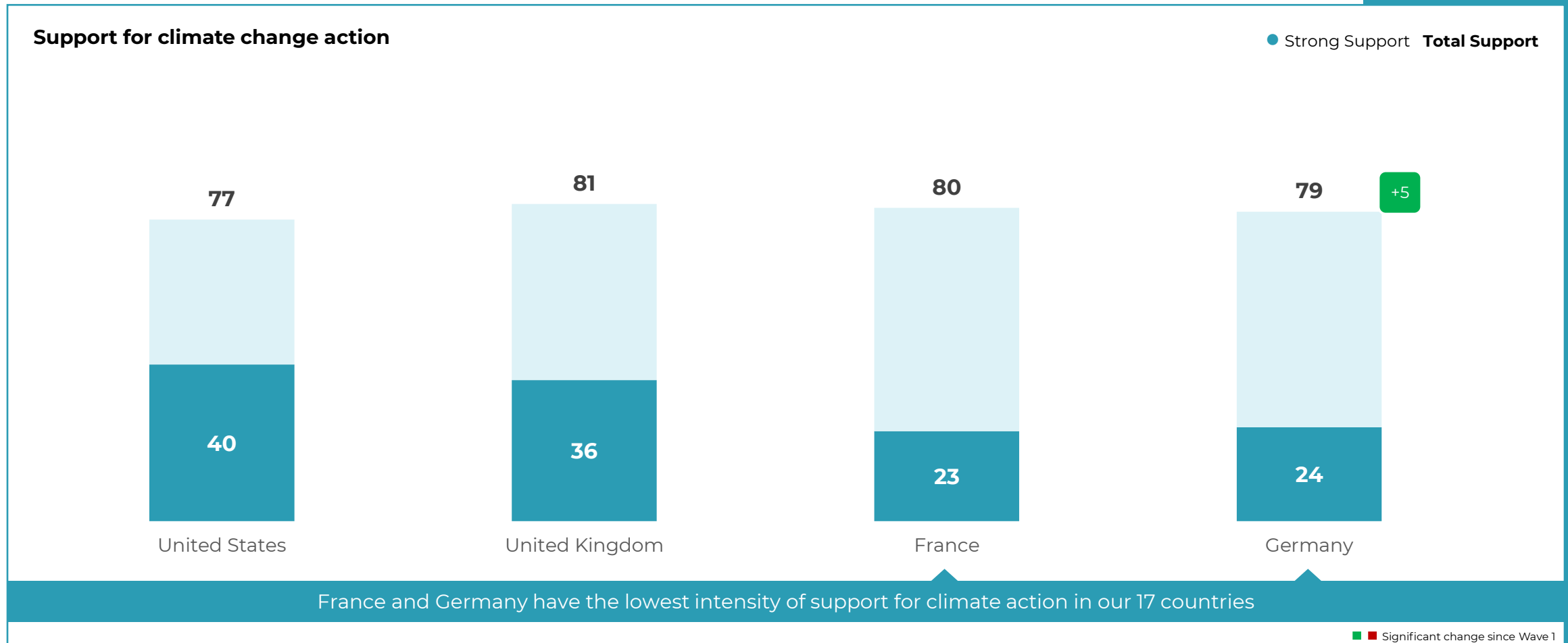
Global Context: In the G7, education on man-made climate change may be crucial to fight misinformation

Belief in climate change

● Man-made climate change ● Non-man-made climate change ● Climate is not changing

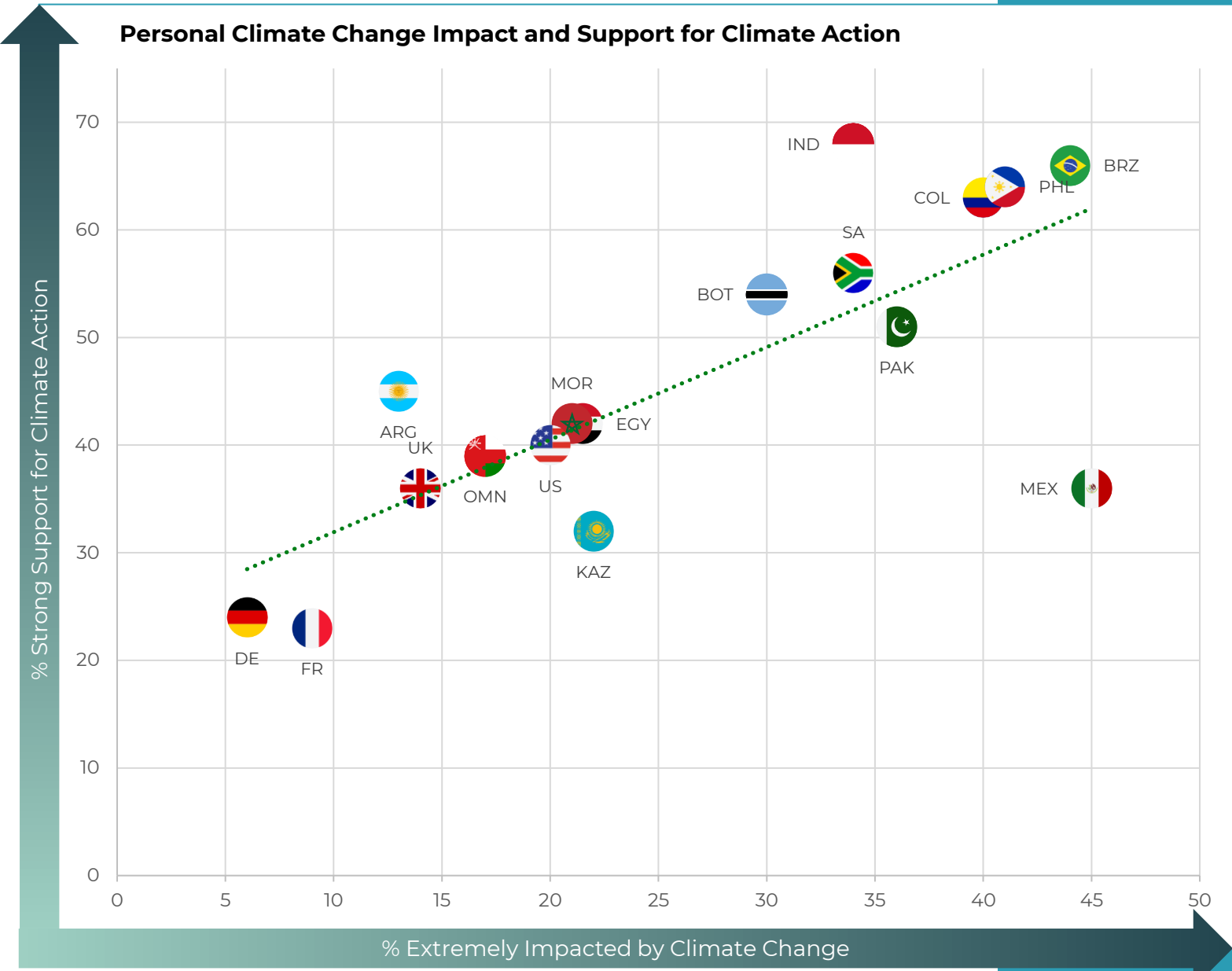


More than 3 in 4 in the G7 support climate actions, but intensity of support is low – especially in Europe



Global Context:

With lower levels of personal impact from climate change, all G7 nations fall below the trendline level of intense support for climate action



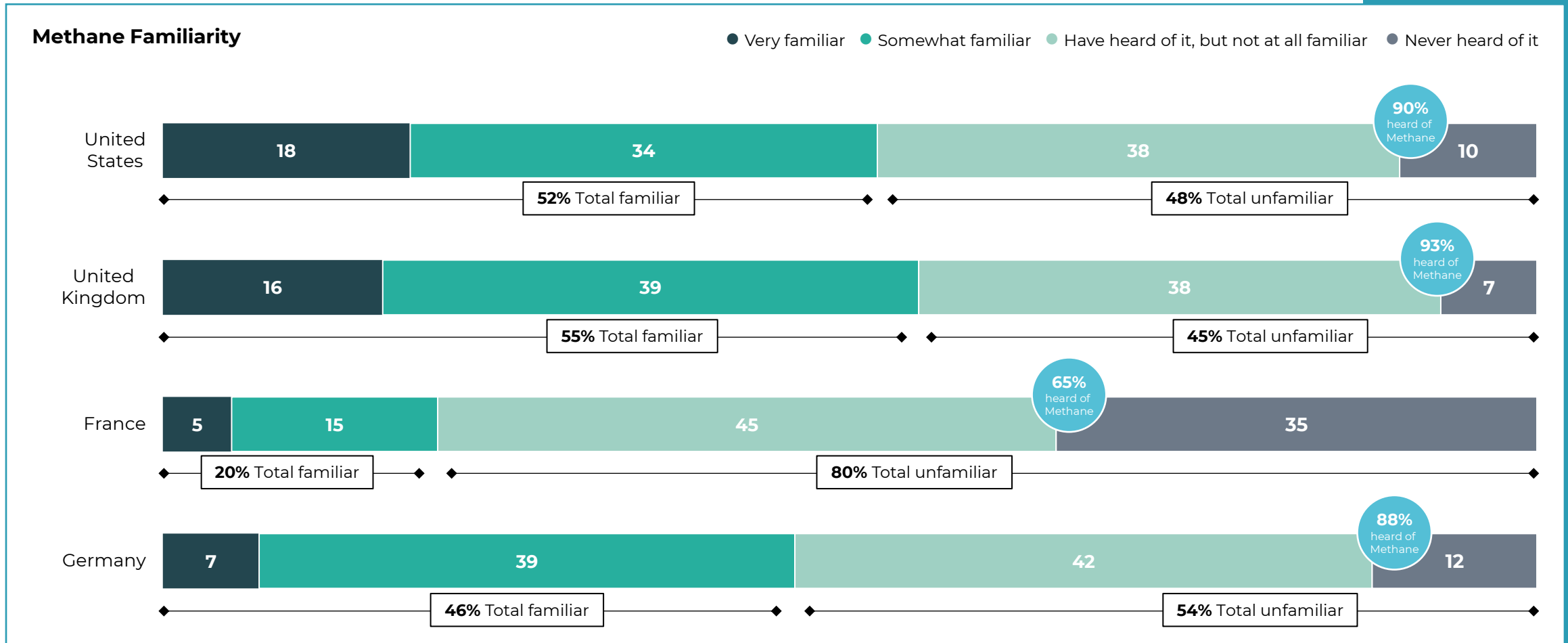
Q4. On a scale of 1-5, how much impact, if any, does the changing climate have on your life?
 Q5. How much, if at all, do you support actions taken to minimize the impacts of climate change?

METHANE ATTITUDES

G7 Region

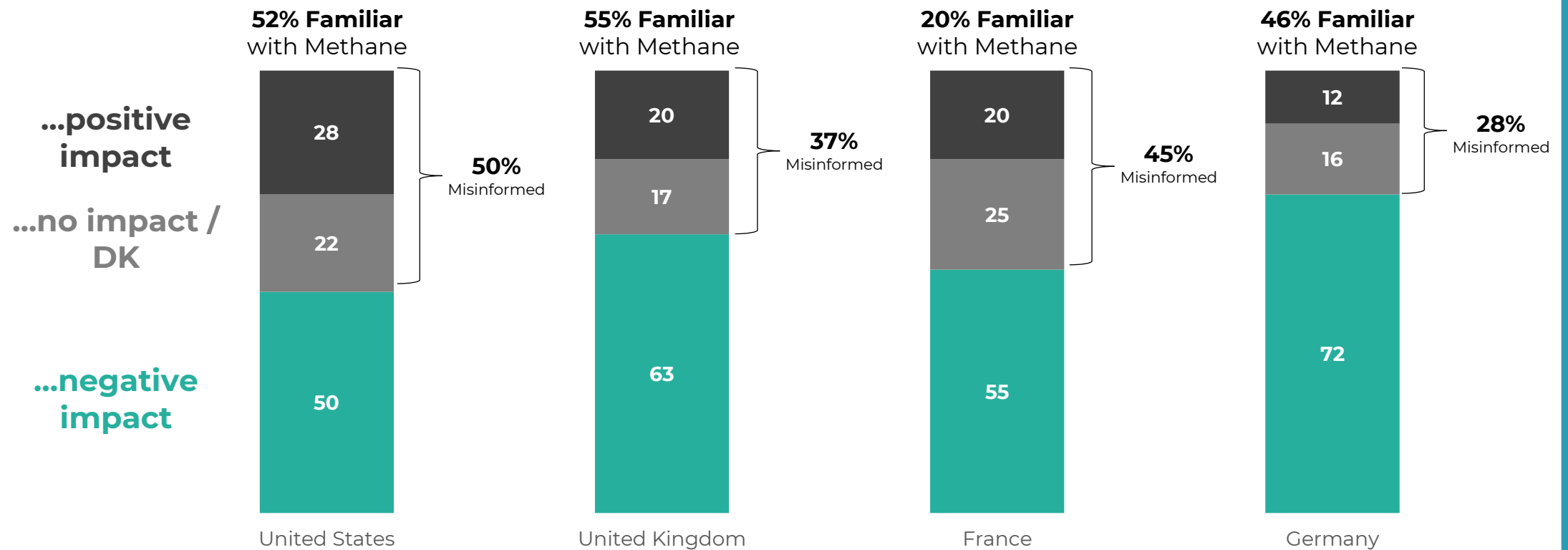


Self-reported methane awareness is high in the G7 outside of France, but many who have heard of it still report being not very or somewhat familiar



Even among those who think they know methane, understanding is lacking; in the US, up to 50% of those "familiar" don't realize its impact on the climate

% Who say Methane has a _____ Impact on the Global Climate
(Among Those Familiar with Methane)



European countries point to agriculture as the greatest contributor to methane emissions, while Americans perceive more impact from waste and energy

Perceived Contributors to Methane Emissions by Country (sorted by % contributors)

US	UK	France	Germany
● Landfills (52%)	● Cows/Livestock (58%)	● Cows/Livestock (55%)	● Cows/Livestock (54%)
● Natural Gas (46%)	● Landfills (54%)	● Landfills (49%)	● Manure (52%)
● Cows/Livestock (45%)	● Manure (53%)	● Manure (49%)	● Landfills (44%)
● Manure (45%)	● Natural Gas (46%)	● Oil Wells (44%)	● Coal Mines (35%)
● Coal Mines (45%)	● Coal Mines (41%)	● Coal Mines (41%)	● Natural Gas (35%)

Global context: France has the lowest self-perceived levels of awareness and familiarity with methane among the 17 countries we surveyed

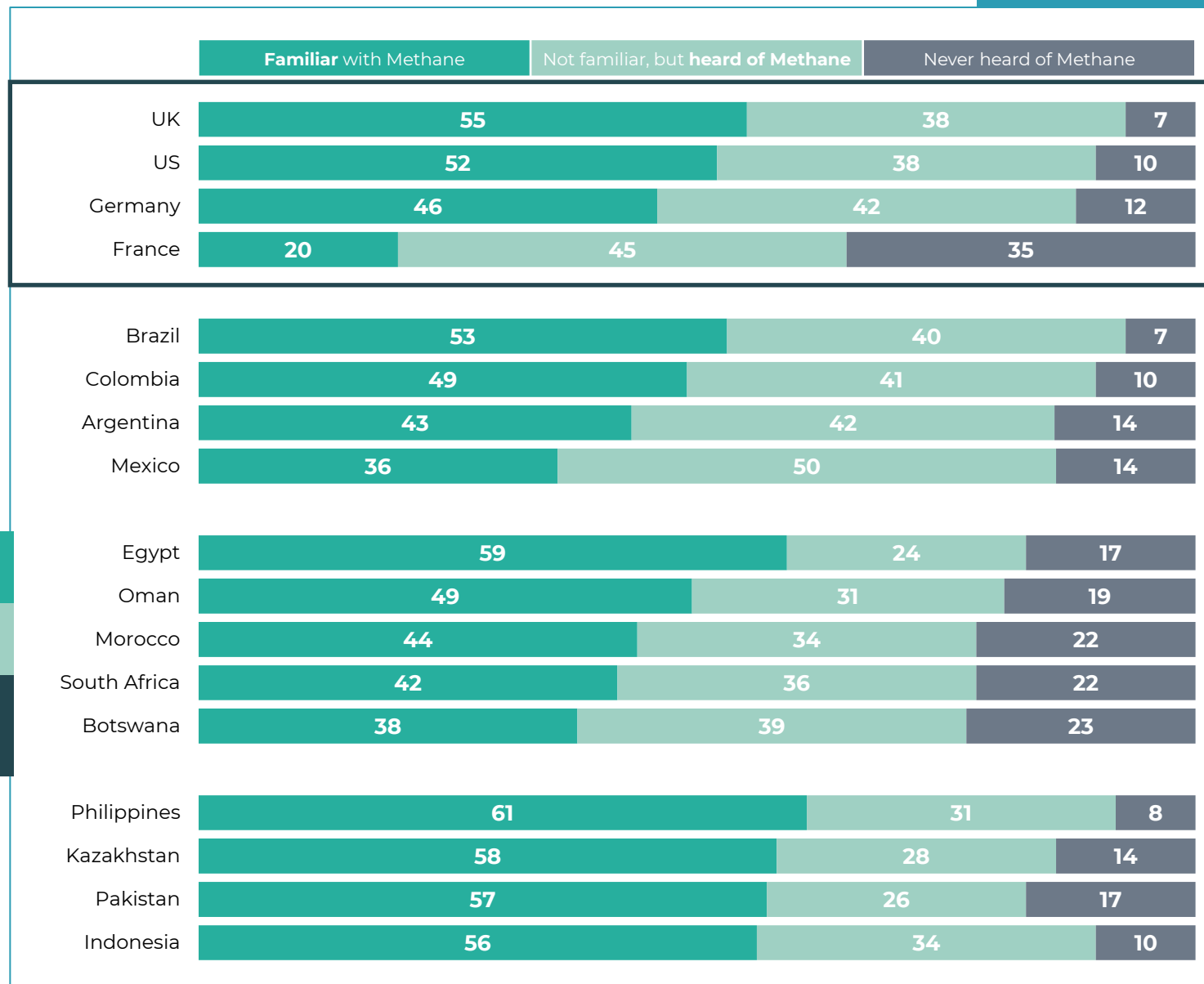
Research Dictionary

Familiar = Know something about a subject
% very or somewhat familiar with an idea, person, etc.

Aware = Ever heard of
(may or may not be familiar)



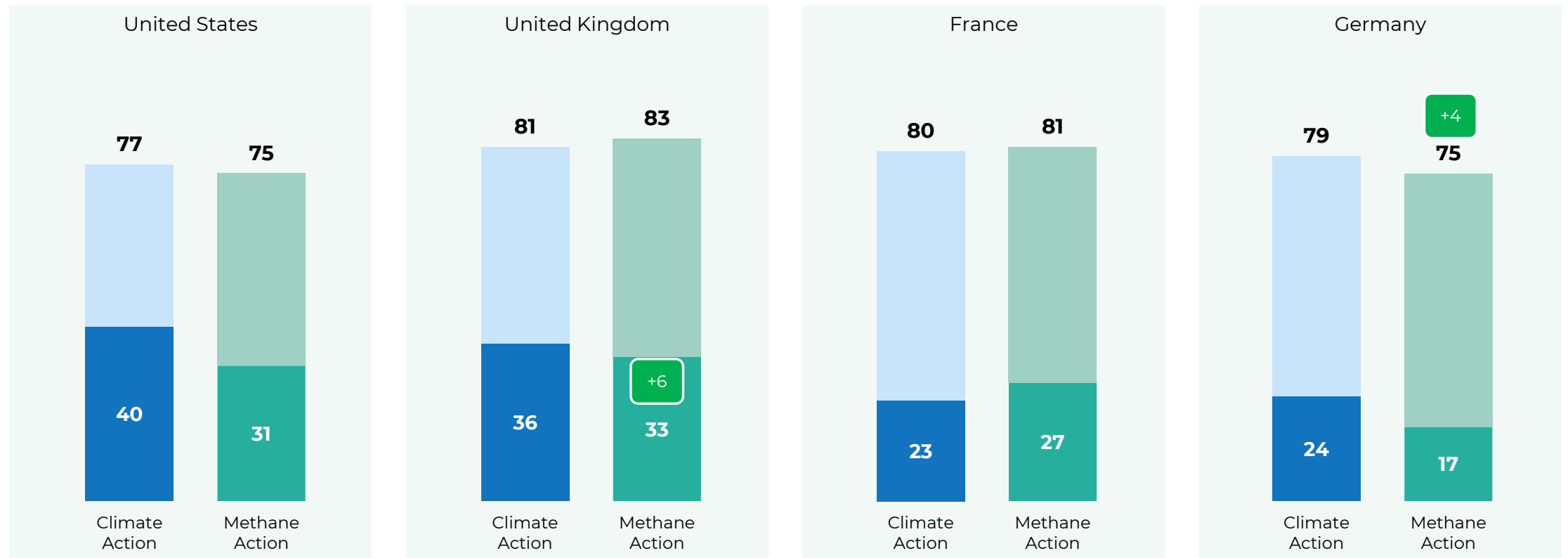
Ex: I'm **aware** of quantum mechanics, but **not familiar** with the topic.



3 in 4 G7 adults support methane action, but intensity of support is lower than for climate action in US, UK, and Germany

Q14. How much, if at all, do you support actions taken to minimize methane emissions?

● Strong support ● Somewhat support Total support



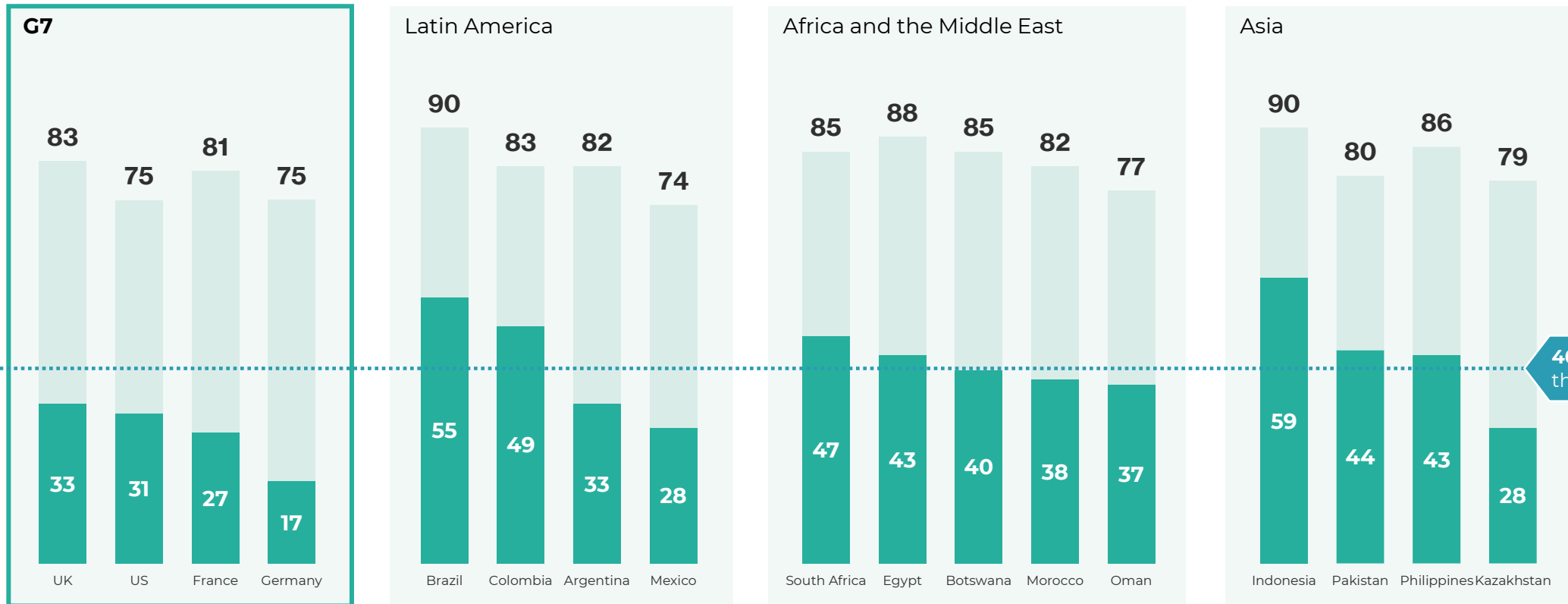
Q5. How much, if at all, do you support actions taken to minimize the impacts of climate change?
 Q14. How much, if at all, do you support actions taken to minimize methane emissions?

■ Significant change since Wave 1

Global context: G7 nations trail the world in intensity of support for methane minimization – not one reaches the 40% threshold

Support for Action to Minimize Methane Emissions

● Strong support ● Somewhat support **Total support**

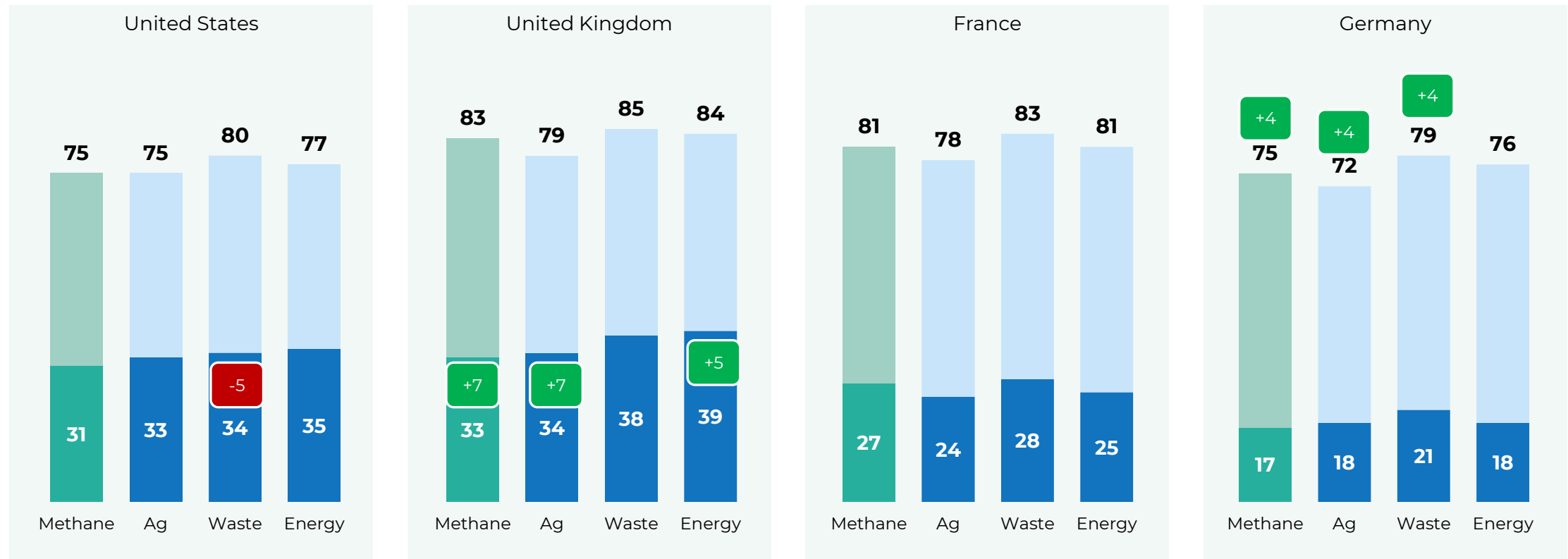


40% "strong support" threshold for policy action

Support for methane action, whether targeted at specific sectors or general efforts, is more consistent in this G7 nations compared to others

Q15. How much, if at all do you support actions to minimize methane emissions from each of the following sectors?

● Strong support ● Somewhat support Total support





COUNTRY LEVEL POLICIES

G7 Region

Defining an NDC methane target does not increase support in the US and Germany, and dampens strong support in the UK and France compared to general methane action

Support for Specific Methane Target in National NDC Plan

● Strong support ● Somewhat support Total support

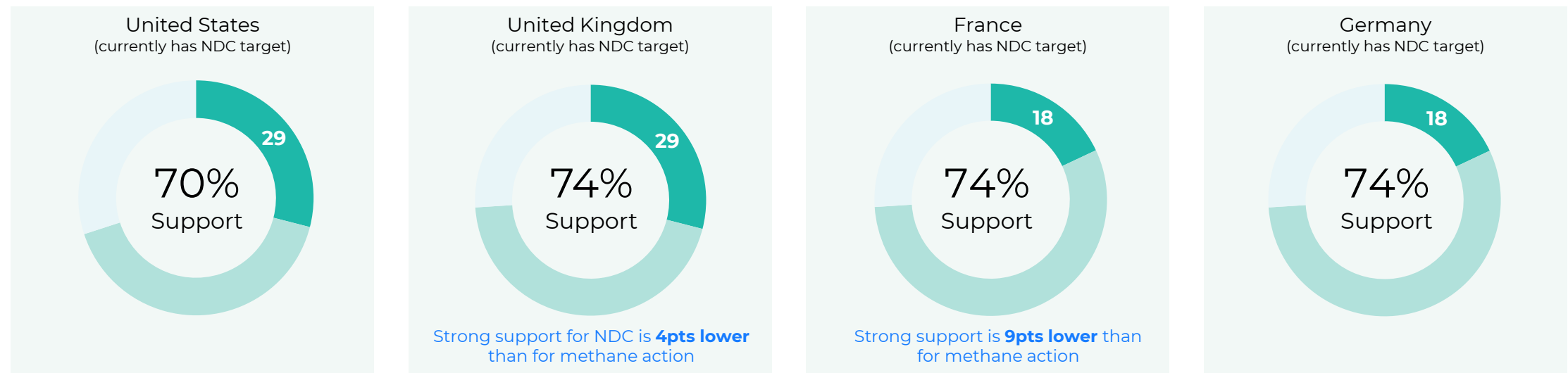
What survey-takers read:

The United Nations Climate Change Conference helps nearly all countries work together to establish goals and agreements to address climate change.

Part of this is the requirement for each country to create a Nationally Determined Contribution plan that outlines the countries' goals to reduce climate change and creates targets for future emissions, such as carbon and methane.

[Your country] currently [does/does not] have a Nationally Determined Contribution plan that includes a specific methane emissions reduction target.

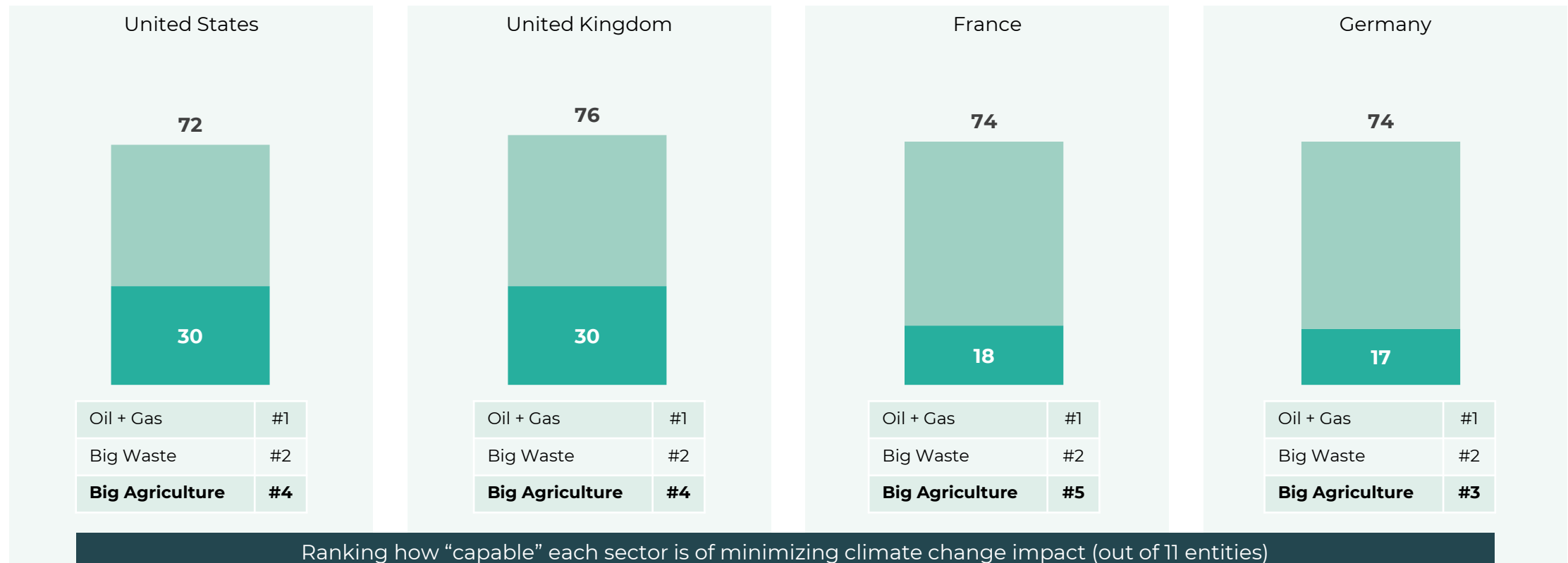
Do you support the inclusion of a specific methane emissions reduction target in [your country's]'s plan?



Agriculture Policy: About 3 in 4 support tracking agriculture emissions, but citizens of each G7 nation see Ag as the least capable of the “big three” sectors for climate action

The creation of a program to monitor and measure methane emissions from the agriculture sector in [your Country].

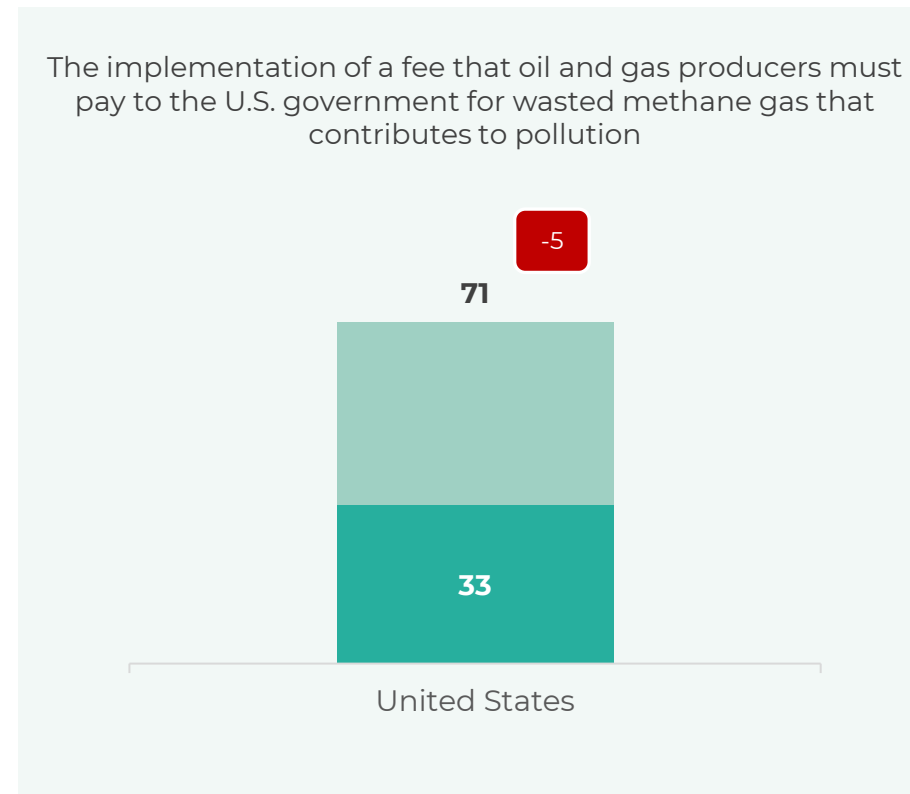
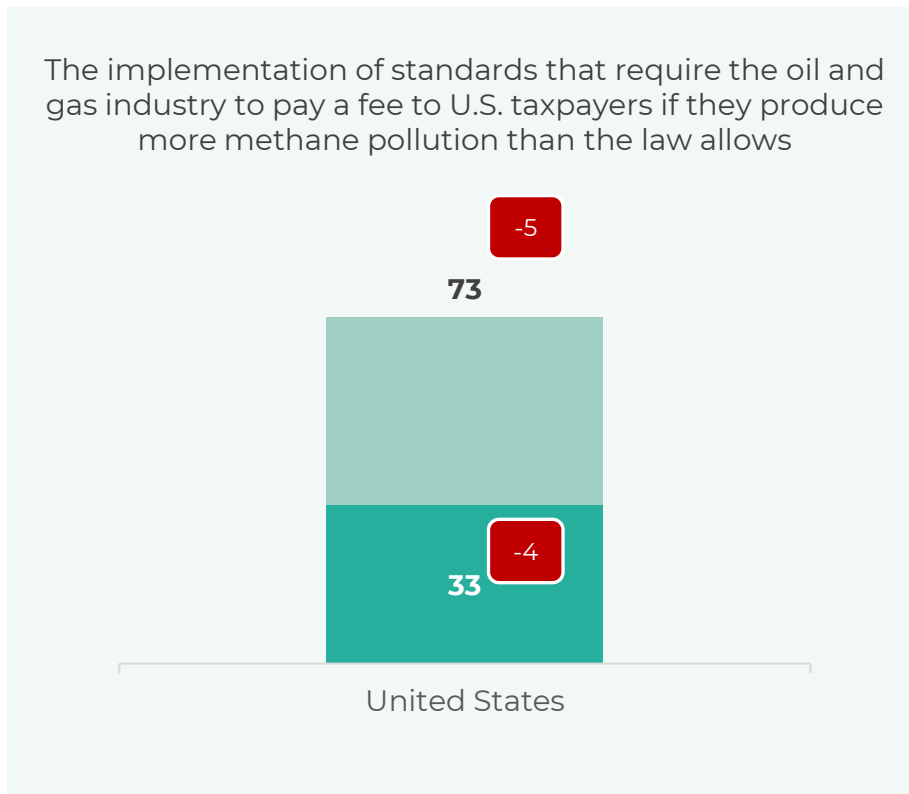
● Strong support ● Somewhat support Total support



More than 7 in 10 Americans support methane fees for excessive or wasted methane emissions, despite President Trump's move to overturn the Inflation Reduction Act provision

To what extent do you support or oppose the following in [your country]?

● Strong support ● Somewhat support Total support

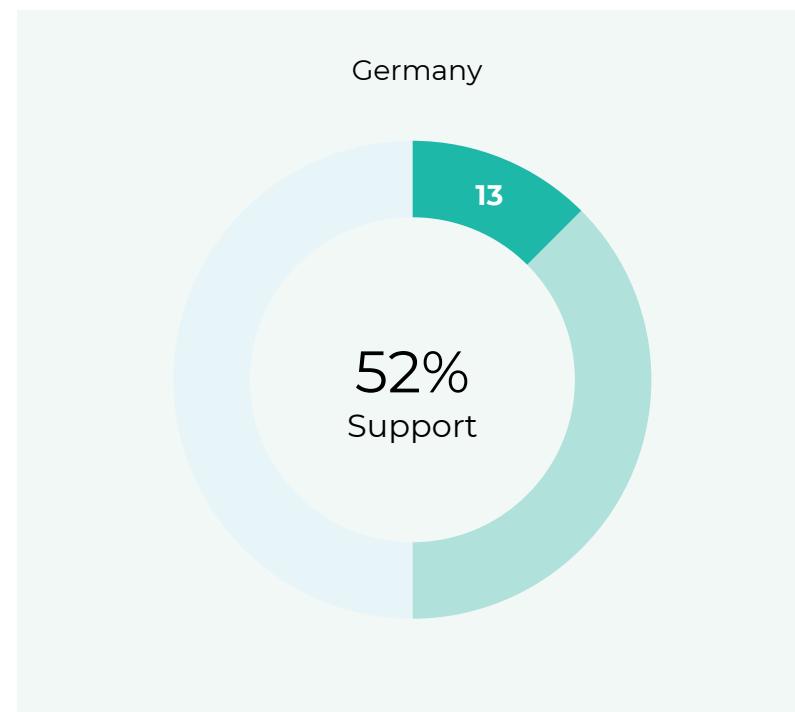
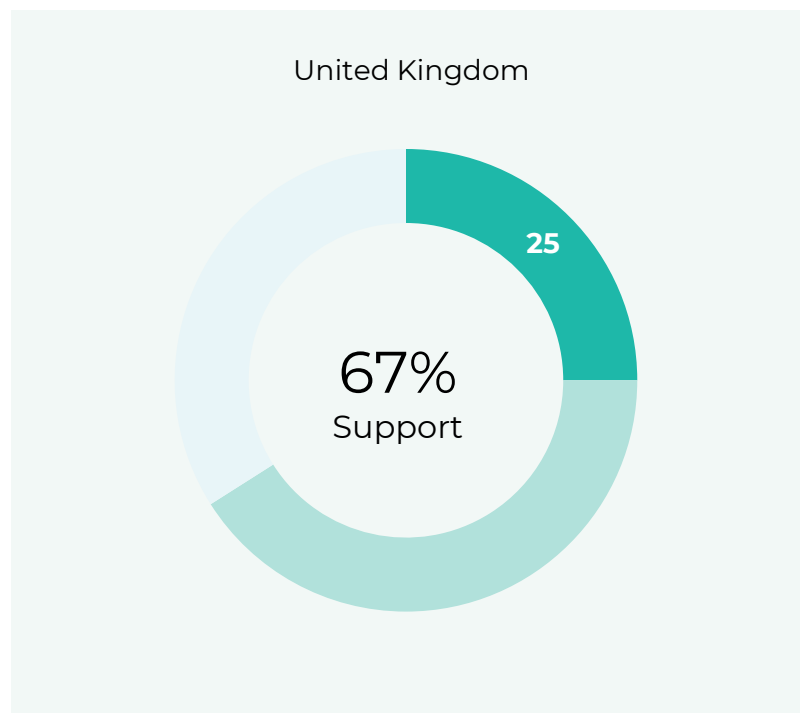


■ Significant change since Wave 1

Support for GHG emissions tax is higher in the UK than in Germany, but the measure fails to rally sufficient intensity of support for likely passage in either nation

Implementation of a tax on greenhouse gas emissions arising from various sectors of industry, including agriculture, energy, and waste management

● Strong support ● Somewhat support Total support

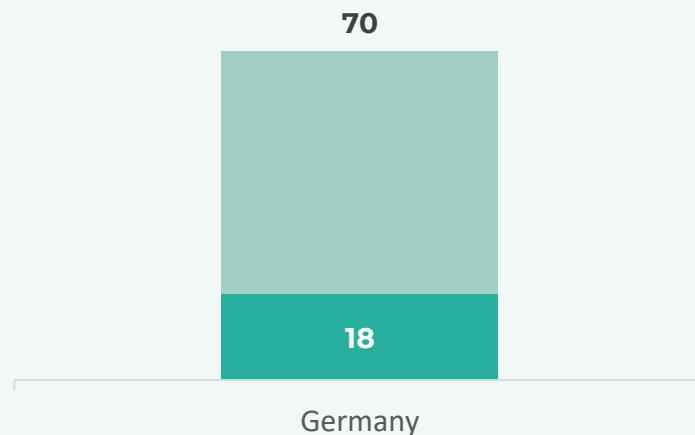


A majority of Germans support both a national methane plan and flaring regulations on energy imports – building a wider base of strong support for these measures will be essential

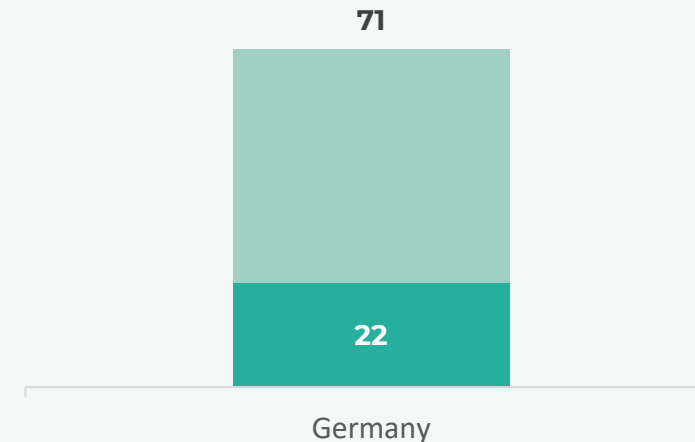
To what extent do you support or oppose the following in [your country]?

● Strong support ● Somewhat support Total support

The implementation of a national methane plan in Germany and the establishment of national methane reduction targets by 2025



The implementation of a policy that requires other countries to minimize methane pollution and flaring when producing the oil and gas they export to Germany

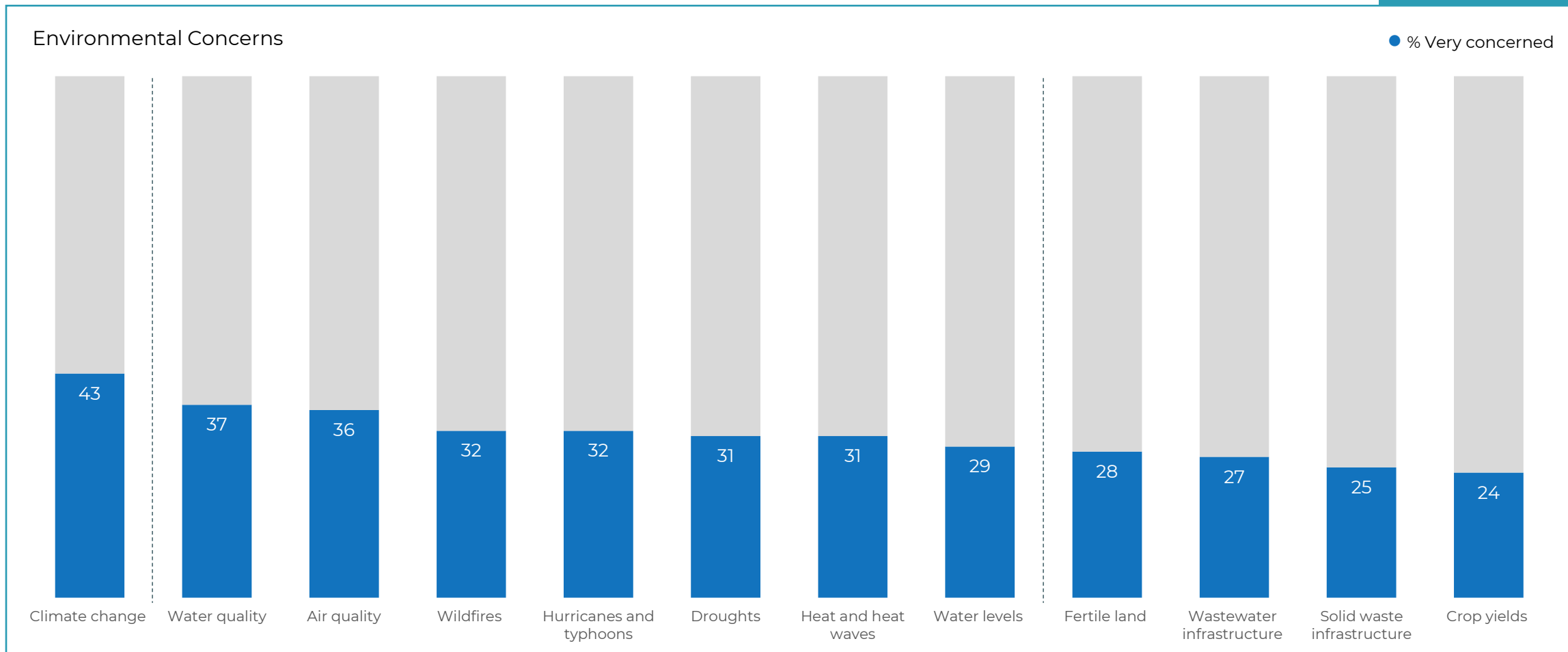


CONCERNS, MESSENGERS, AND INSTITUTIONS

G7 Region

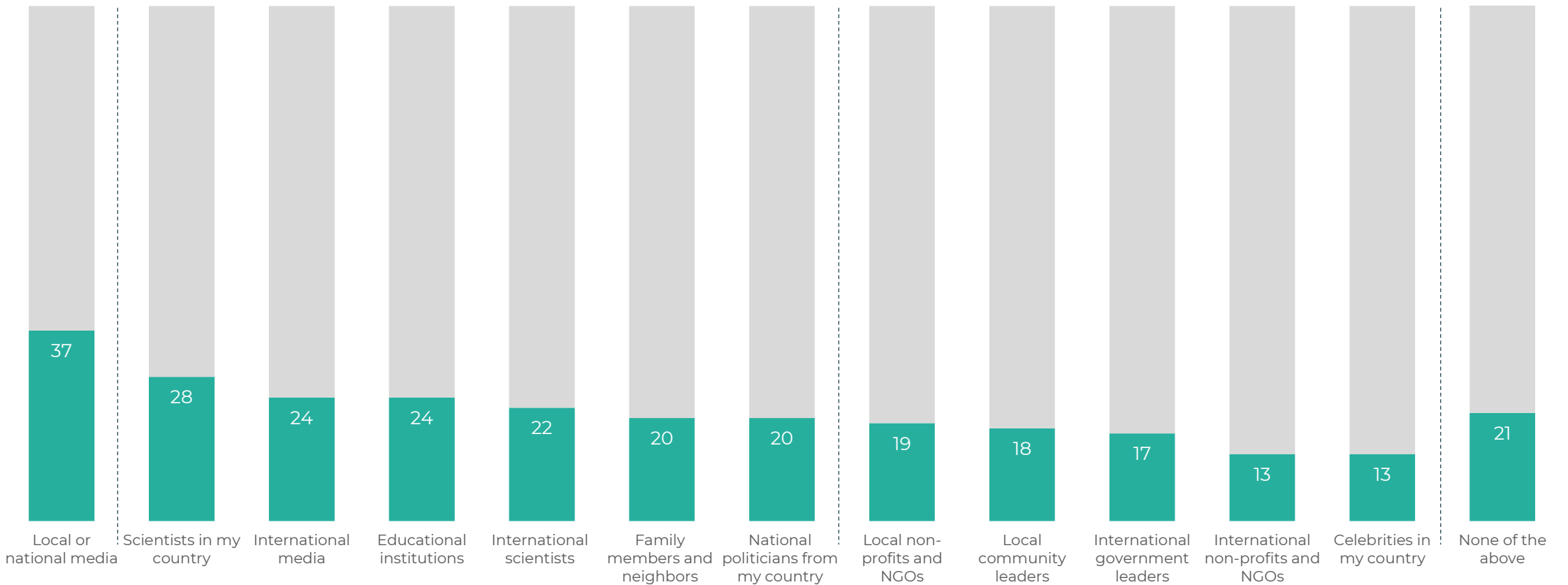


Americans' top environmental concern is climate change, followed by air and water quality; all other issues have less than one-third very concerned

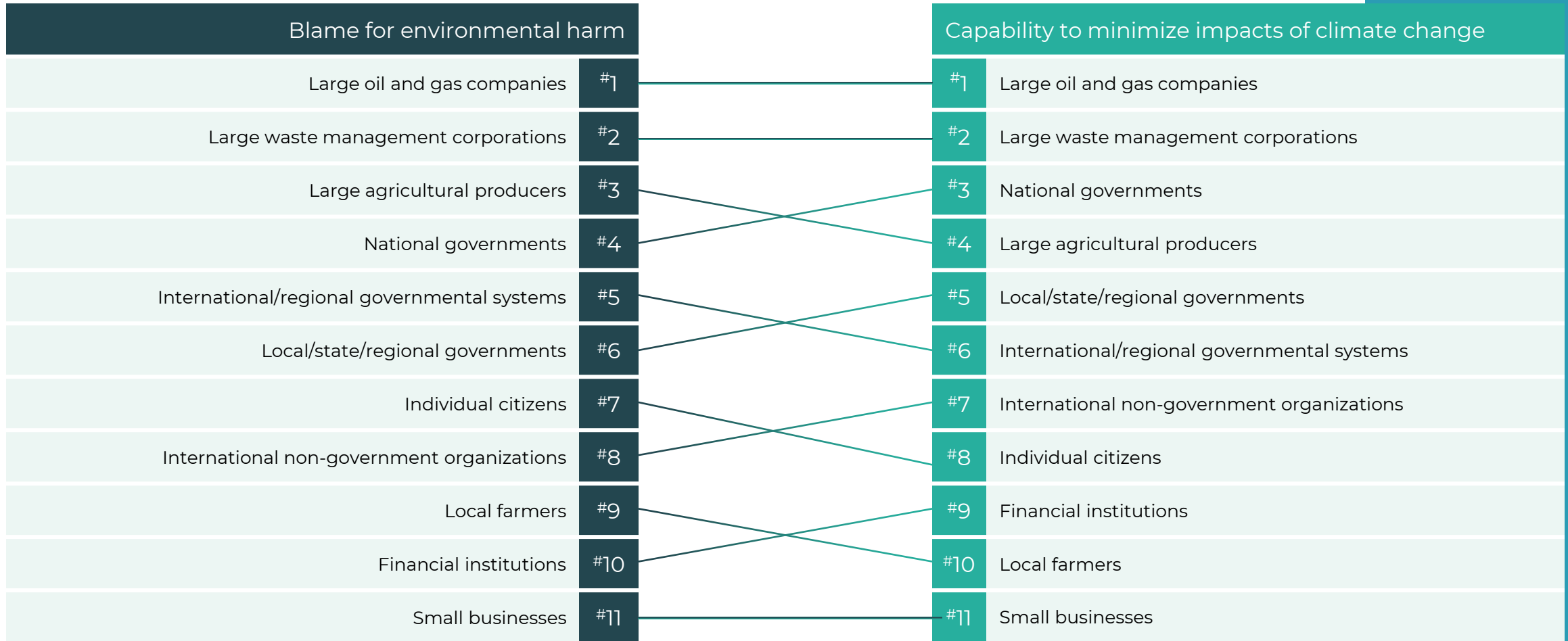


Americans look first to national or local media for climate change information, but more than a fifth get no climate info at all

Climate Change Information Sources

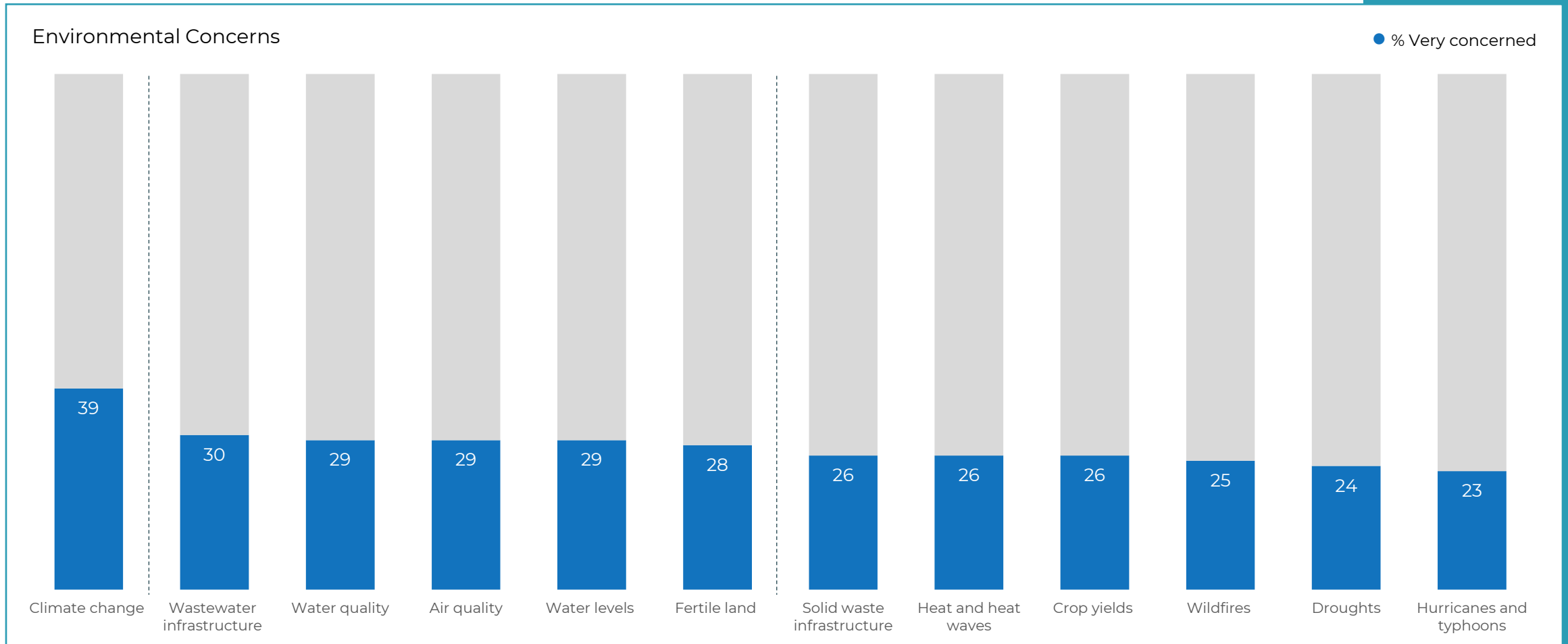


Americans blame large energy, waste, and agriculture corporations the most, but believe these private sector actors have the capacity to minimize climate change – along with national governments



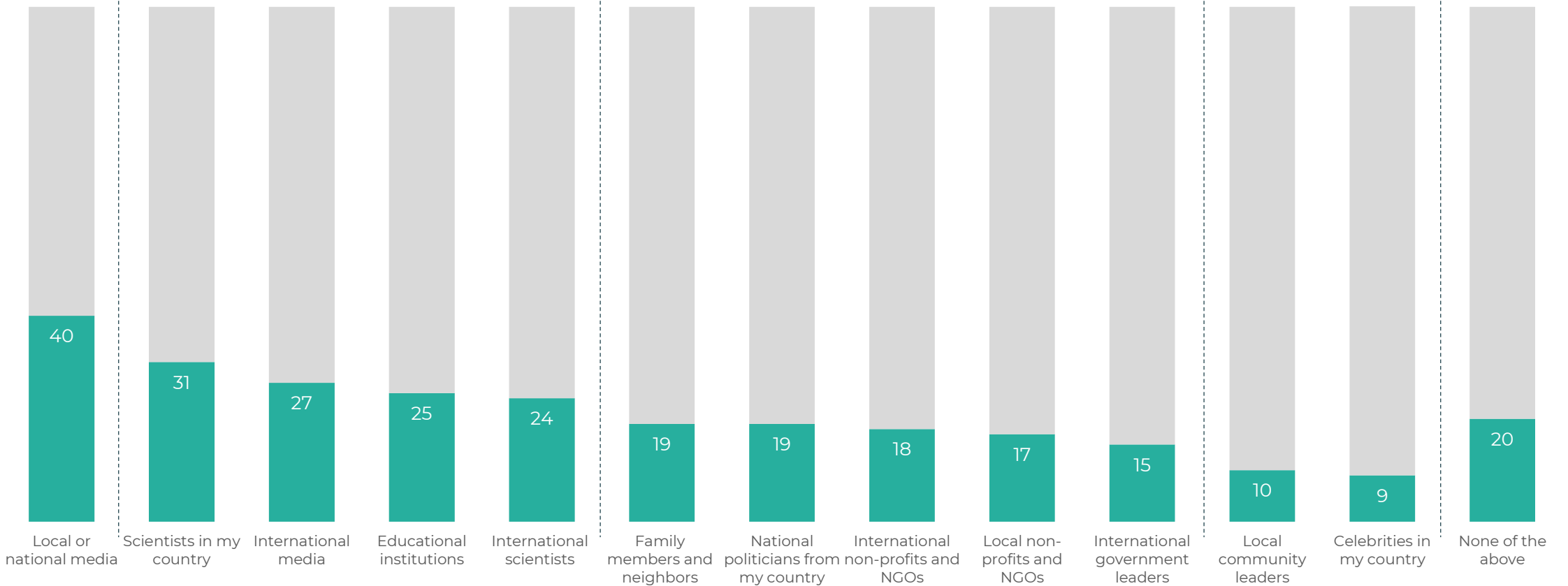
Q20. People have many ideas about which groups are to blame for environmental harm. Below, you will see a list of these groups. Please rank the five groups most blameworthy for environmental harm from the options below.
 Q21. To what extent do you believe the following groups are capable of making meaningful changes to minimize the impacts of climate change?

After climate change, respondents in the UK are most concerned about issues relating to water quality

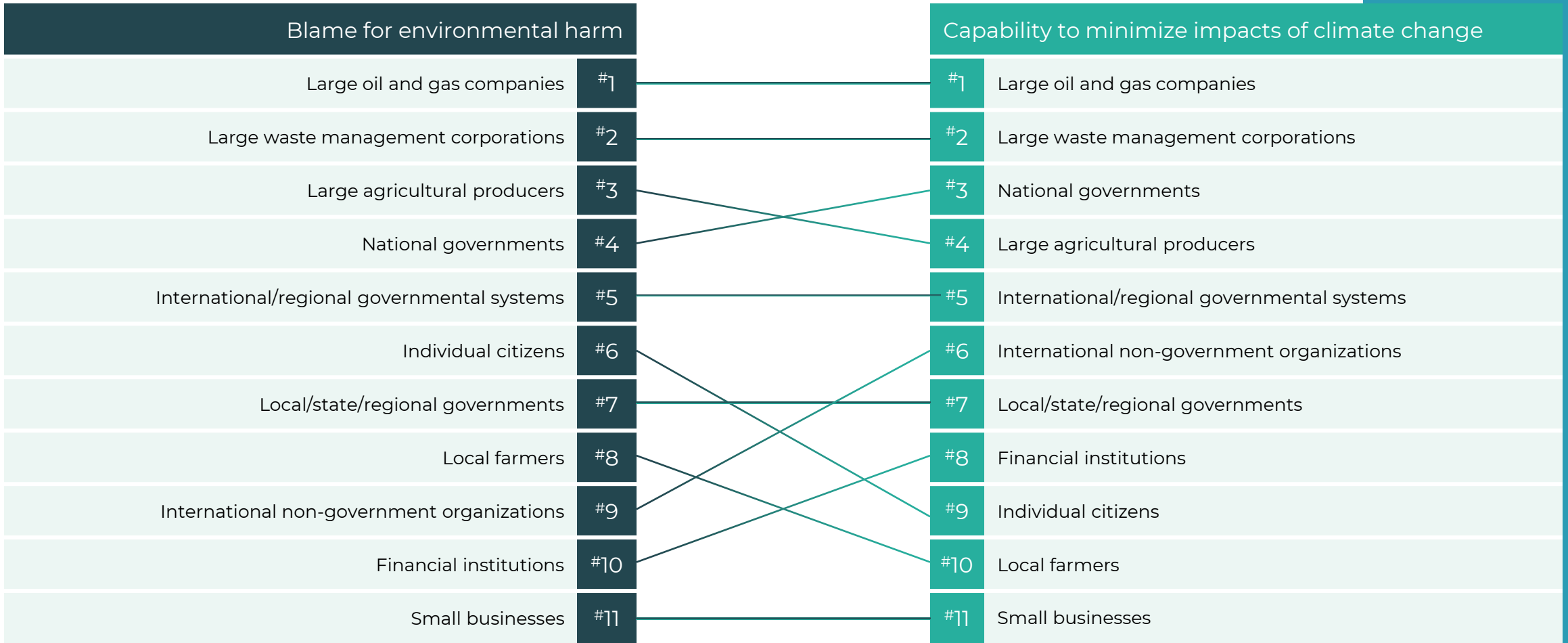


Britons go to local and national media first for climate information, followed by British scientists

Climate Change Information Sources

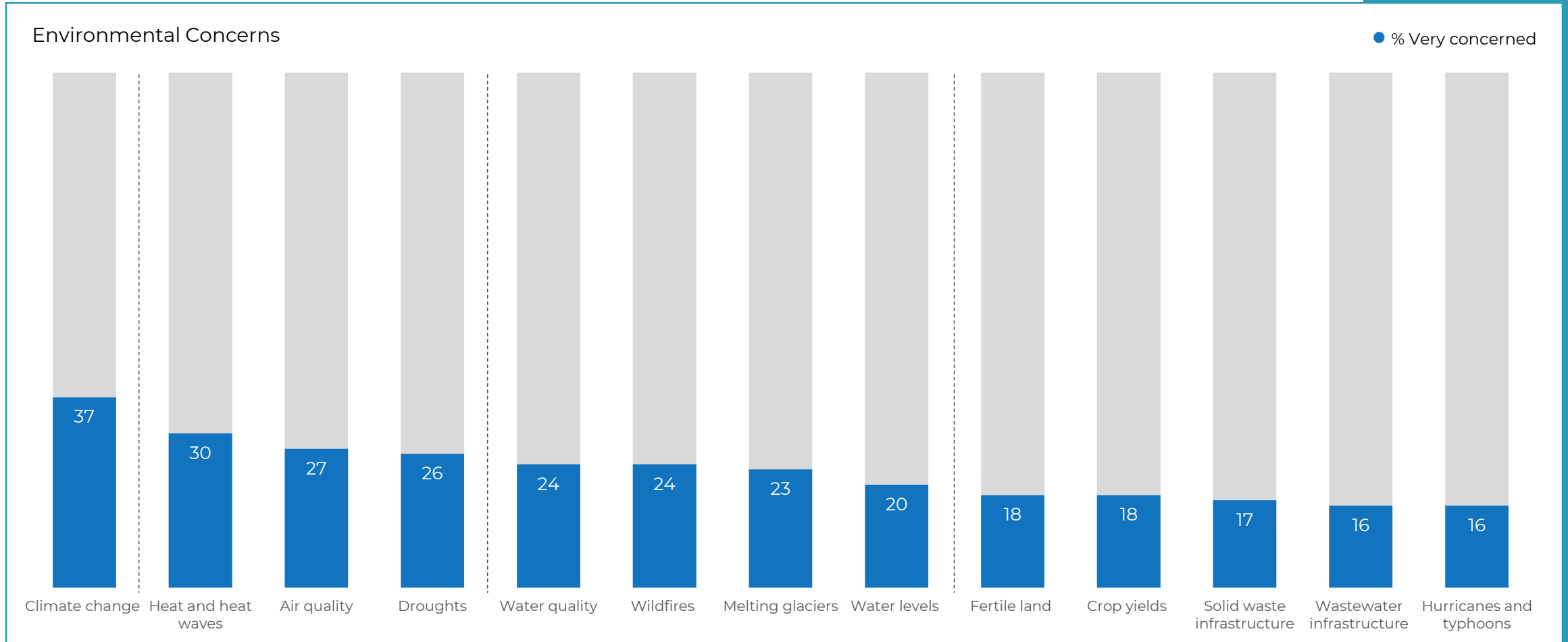


UK respondents blame polluting corporations for environmental harm, followed by governments; when it comes to minimizing climate change, national governments are viewed as more capable than agriculture



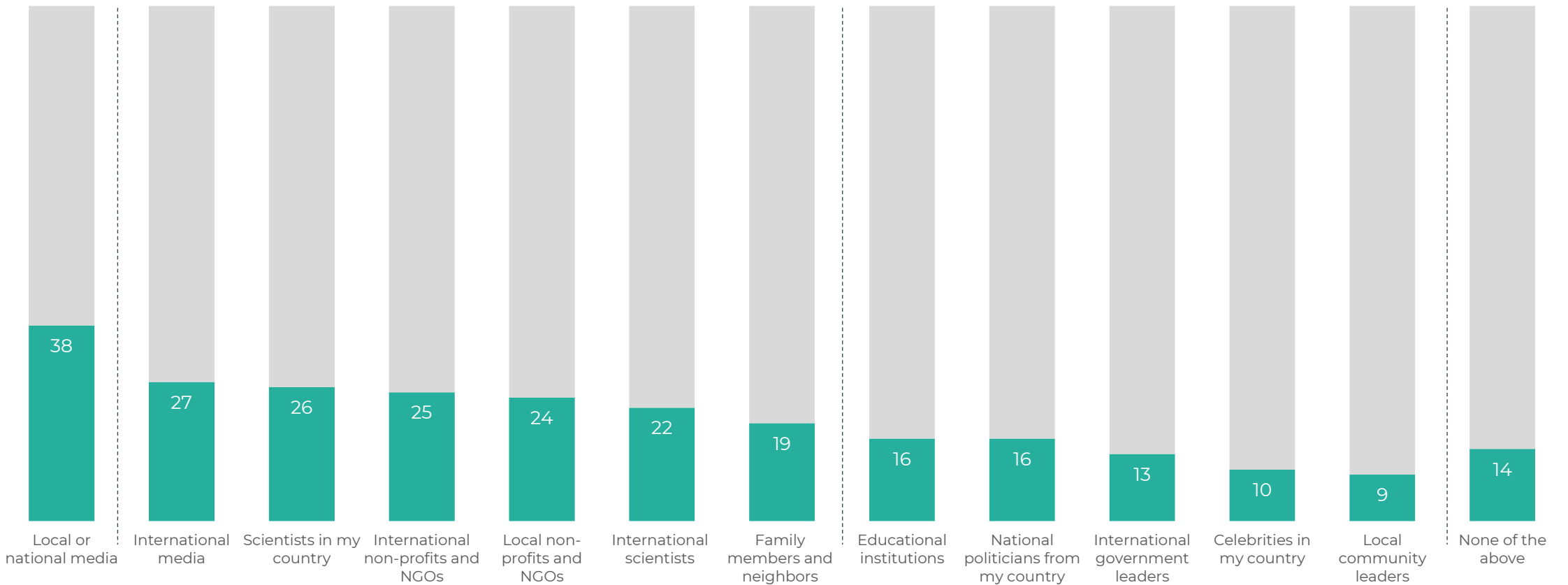
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 Q21. To what extent do you believe the following groups are capable of making meaningful changes to minimize the impacts of climate change?

The French express a relatively low level of concern when it comes to environmental issues; unavoidable issues like heat and air are more concerning for French respondents

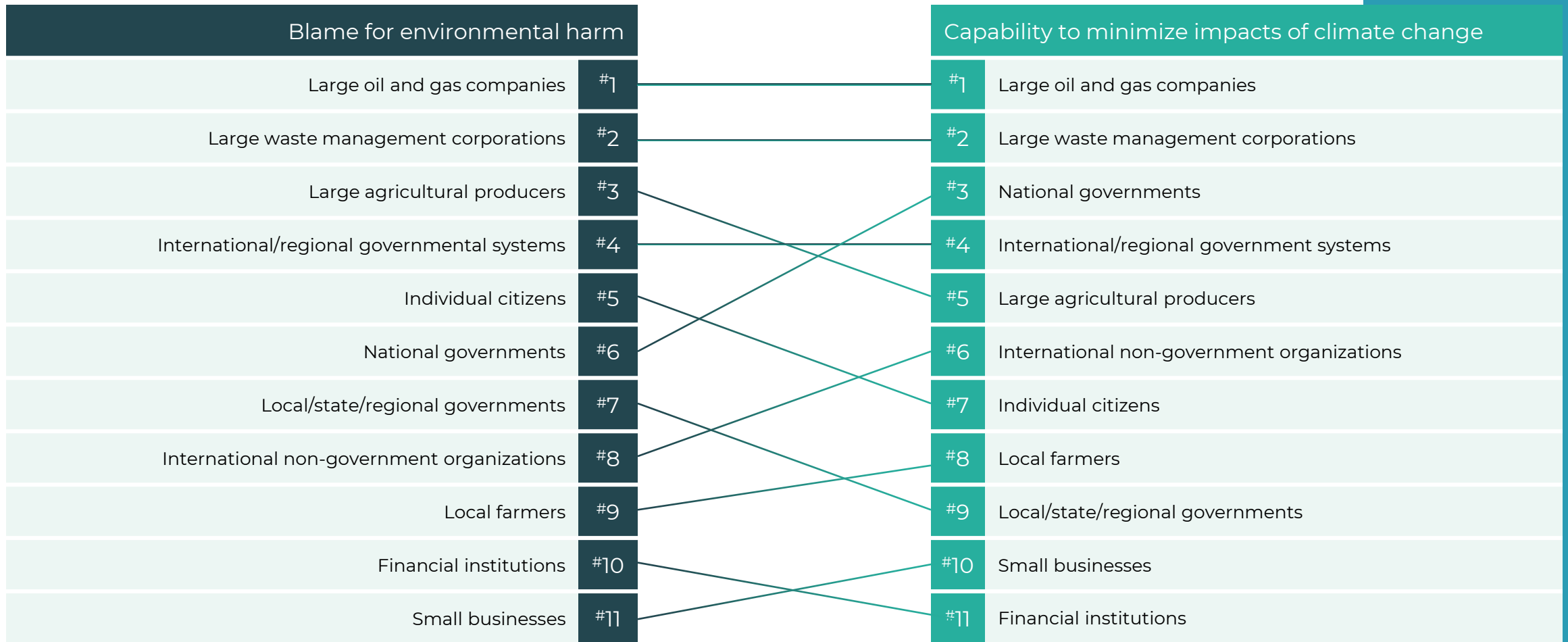


French people turn to French media most often, but also look to local and international NGOs for climate change information

Climate Change Information Sources

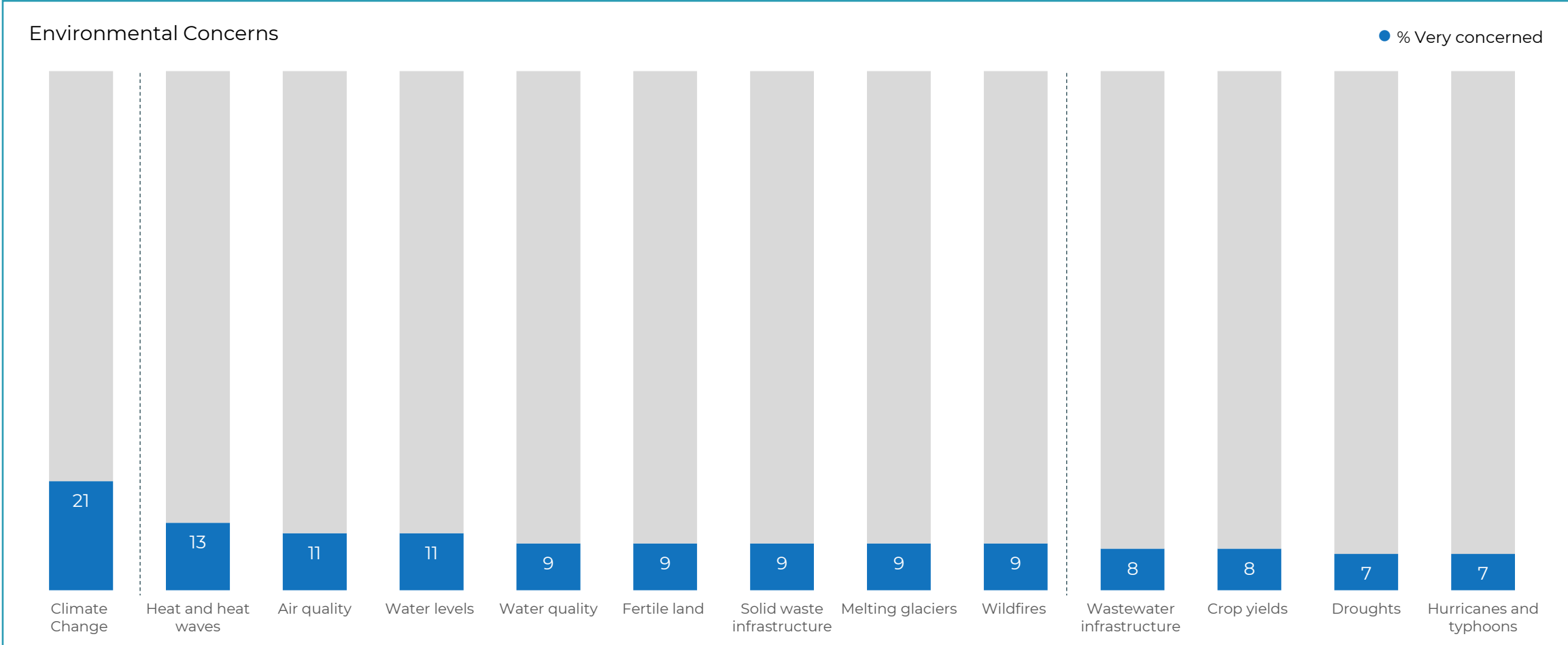


Like other G7 countries, France blames large corporations for environmental harm; however, agricultural producers have less capability to mitigate climate change than national or international governments



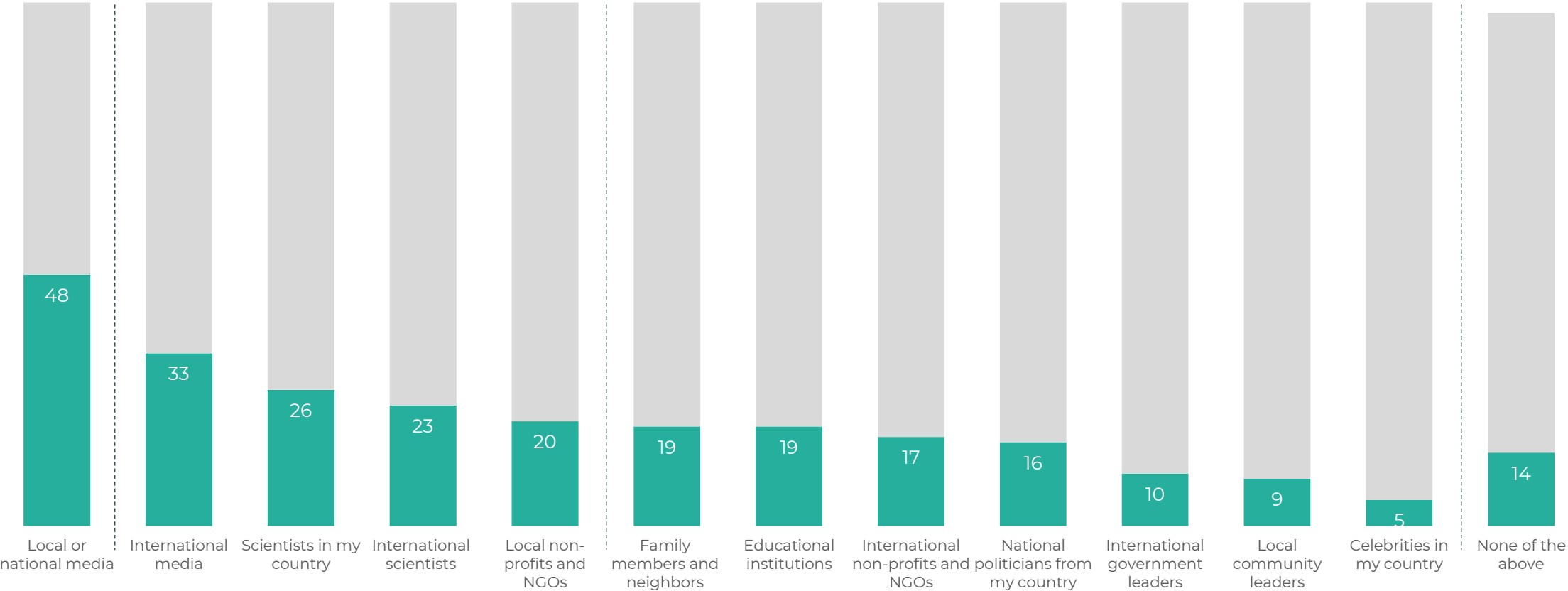
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 Q21. To what extent do you believe the following groups are capable of making meaningful changes to minimize the impacts of climate change?

Only a very small share of surveyed Germans were very concerned about environmental issues – climate change is more concerning than specific issues or weather events

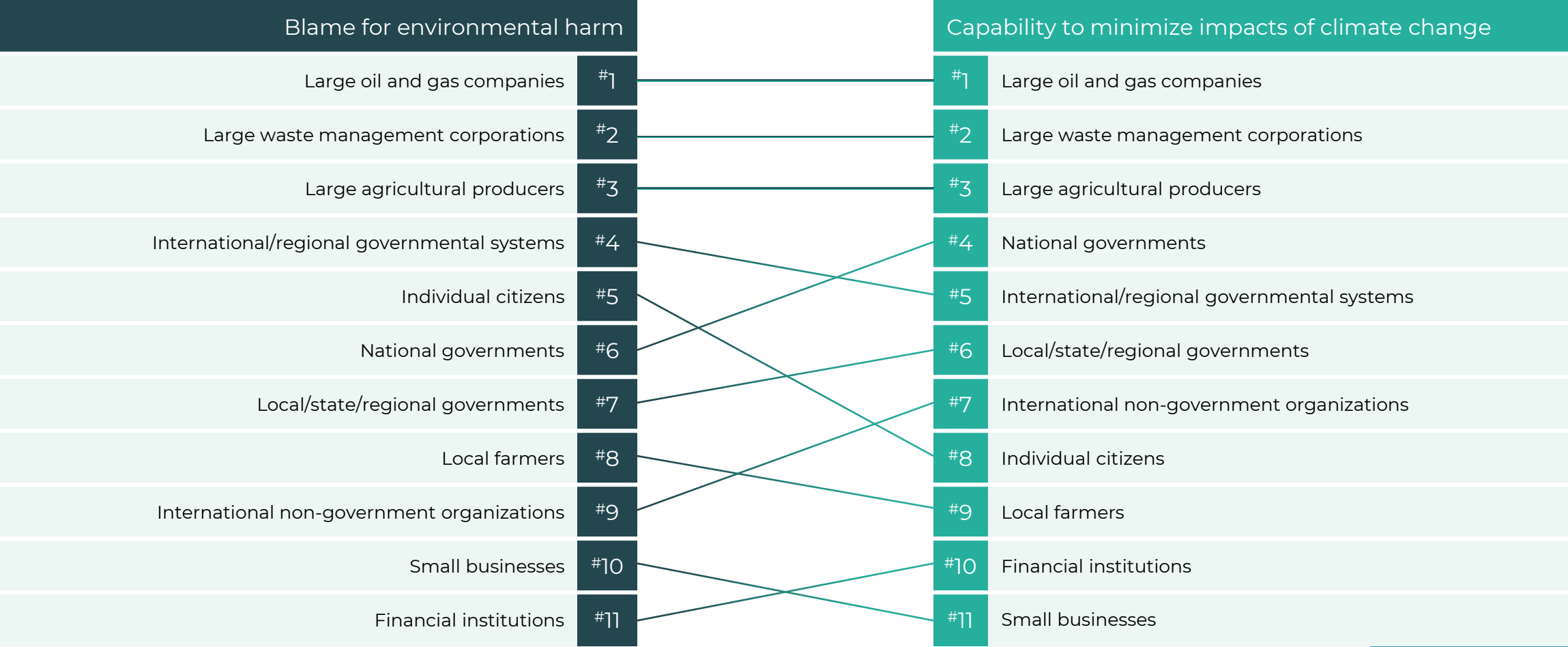


Germans embrace local and international media as well as scientists for climate change info; they are less convinced by local community and international leaders

Climate Change Information Sources



Germans primarily blame corporations; despite placing a substantial amount of blame on individuals, they are mostly viewed as not very capable of minimizing climate change



Q20. People have many ideas about which groups are to blame for environmental harm. Below, you will see a list of these groups. Please rank the five groups most blameworthy for environmental harm from the options below.
 Q21. To what extent do you believe the following groups are capable of making meaningful changes to minimize the impacts of climate change?

APPENDIX: KEY METRICS BY AGE

G7 Region



Younger Americans feel greater climate impact and show stronger support for action

	Total	18-29	30-39	40-49	50+
Q4: On a scale of 1-5, how much impact, if any, does the changing climate have on your life? (% saying 4 or 5 out of 5)	34	41	46	35	25
Q5: How much, if at all, do you support actions taken to minimize the impacts of climate change? (% strongly support)	40	47	45	34	38
Q5 (% total support)	77	80	80	77	74
Q9: How familiar are you, if at all, with methane? (% very + somewhat familiar)	52	45	65	55	47
Q14: How much, if at all, do you support actions taken to minimize methane emissions? (% strongly support)	31	34	32	30	31
Q14 (% total support)	75	76	76	72	76

Young adults in the UK feel the greatest climate impact and show strong support for methane reduction; Older adults are less familiar with methane but maintain high total support for action

	Total	18-29	30-39	40-49	50+
Q4: On a scale of 1-5, how much impact, if any, does the changing climate have on your life? (% saying 4 or 5 out of 5)	25	41	37	19	16
Q5: How much, if at all, do you support actions taken to minimize the impacts of climate change? (% strongly support)	36	39	39	39	33
Q5 (% total support)	81	76	80	76	84
Q9: How familiar are you, if at all, with methane? (% very + somewhat familiar)	55	60	67	50	50
Q14: How much, if at all, do you support actions taken to minimize methane emissions? (% strongly support)	33	41	36	28	31
Q14 (% total support)	83	82	76	83	86

Despite a higher perceived sense of climate impact, the youngest French are not more likely to support climate or methane actions than those aged 50+

	Total	18-29	30-39	40-49	50+
Q4: On a scale of 1-5, how much impact, if any, does the changing climate have on your life? (% saying 4 or 5 out of 5)	22	31	20	18	21
Q5: How much, if at all, do you support actions taken to minimize the impacts of climate change? (% strongly support)	23	24	23	22	24
Q5 (% total support)	80	80	73	79	83
Q9: How familiar are you, if at all, with methane? (% very + somewhat familiar)	20	26	37	16	14
Q14: How much, if at all, do you support actions taken to minimize methane emissions? (% strongly support)	27	30	23	21	29
Q14 (% total support)	81	73	73	84	86

Younger Germans show lower support for climate and methane actions despite reporting the highest perceived impact of climate change

	Total	18-29	30-39	40-49	50+
Q4: On a scale of 1-5, how much impact, if any, does the changing climate have on your life? (% saying 4 or 5 out of 5)	17	27	16	20	12
Q5: How much, if at all, do you support actions taken to minimize the impacts of climate change? (% strongly support)	24	14	24	27	26
Q5 (% total support)	79	74	75	81	81
Q9: How familiar are you, if at all, with methane? (% very + somewhat familiar)	46	40	54	48	44
Q14: How much, if at all, do you support actions taken to minimize methane emissions? (% strongly support)	17	13	16	21	18
Q14 (% total support)	75	63	71	73	82



Global
Methane
Hub

BURSON INSIGHTS, DATA & INTELLIGENCE

Thank You

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