



BURSON INSIGHTS, DATA & INTELLIGENCE

Global Methane Poll Wave 2: Total Study Results Overview

Burson



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METHODOLOGY SNAPSHOT

- 1 The GMH poll was conducted by Burson Data, Insights & Intelligence (formerly BSG) from January 14 to February 8, 2025.
- 2 The 10-minute survey, translated into 14 languages, was fielded in 17 countries across North America, South America, Europe, Africa, and Asia.
- 3 A minimum of 750 responses were collected in 12 countries (Argentina, Brazil, Colombia, Egypt, France, Germany, Indonesia, Mexico, the Philippines, South Africa, the United States, and the United Kingdom), with a margin of error of approximately $\pm 3.58\%$. In the remaining 5 countries (Morocco, Oman, Botswana, Kazakhstan, and Pakistan), a minimum of 600 responses were collected, with a margin of error of about $\pm 4.00\%$.

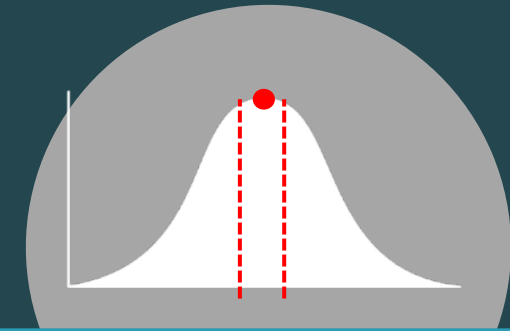
THE MARGIN OF ERROR AND HOW TO USE IT

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.



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

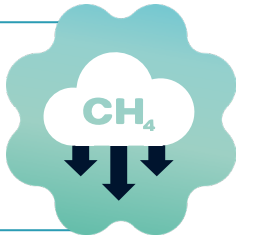
Understanding the Survey: Key Questions and Topics



KEY FINDINGS

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

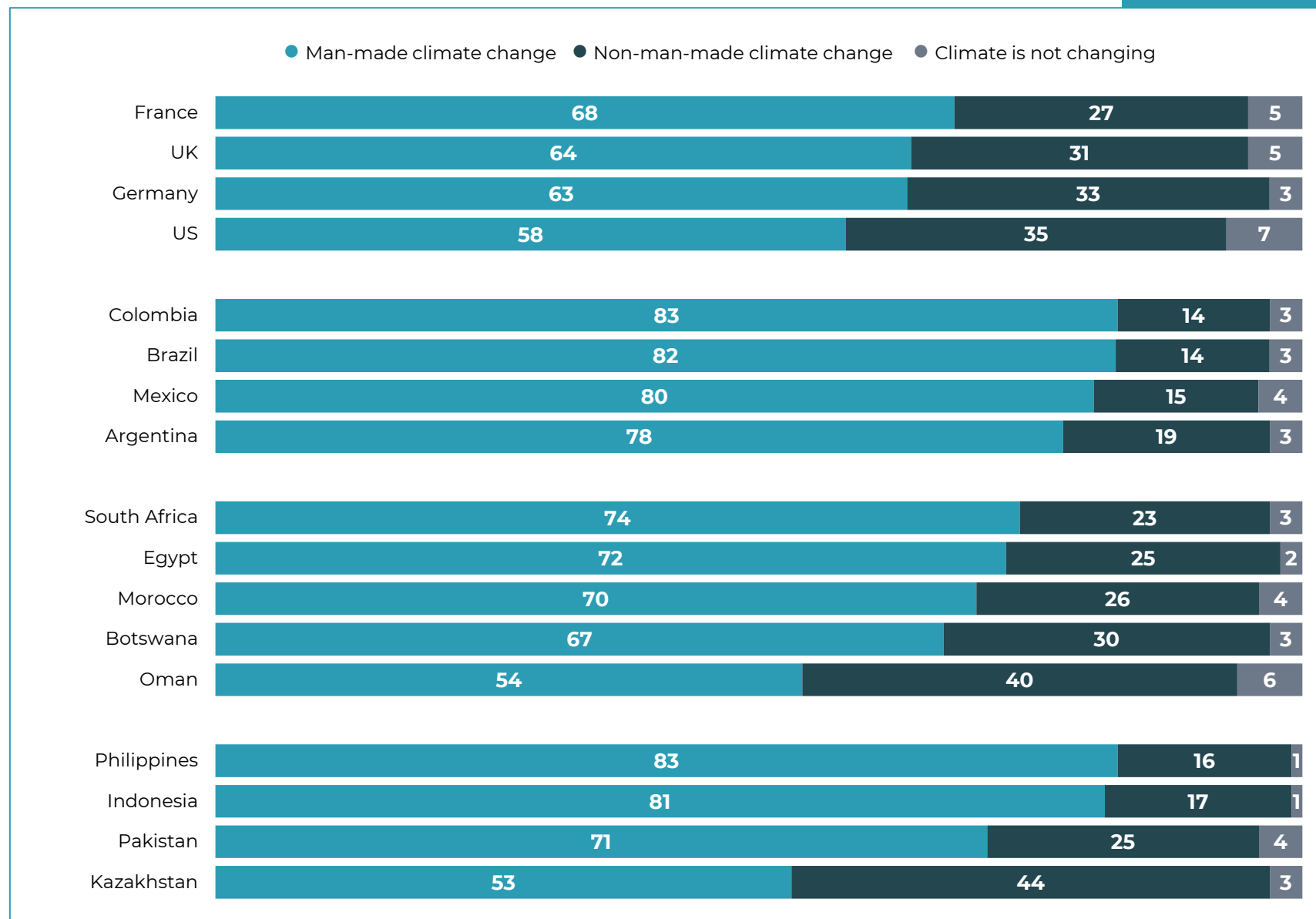
Efforts to curb methane emissions from the **agriculture sector are likely to face the most resistance**, especially in agriculturally dependent economies.



GLOBAL FINDINGS



BELIEF IN CLIMATE CHANGE: There are relatively few outright climate deniers worldwide – but nearly half (44%) in Kazakhstan, 40% in Oman, and 35% in the US believe human actions are not causing climate change



KEY FINDING #1:


Familiarity + Intensity of Support

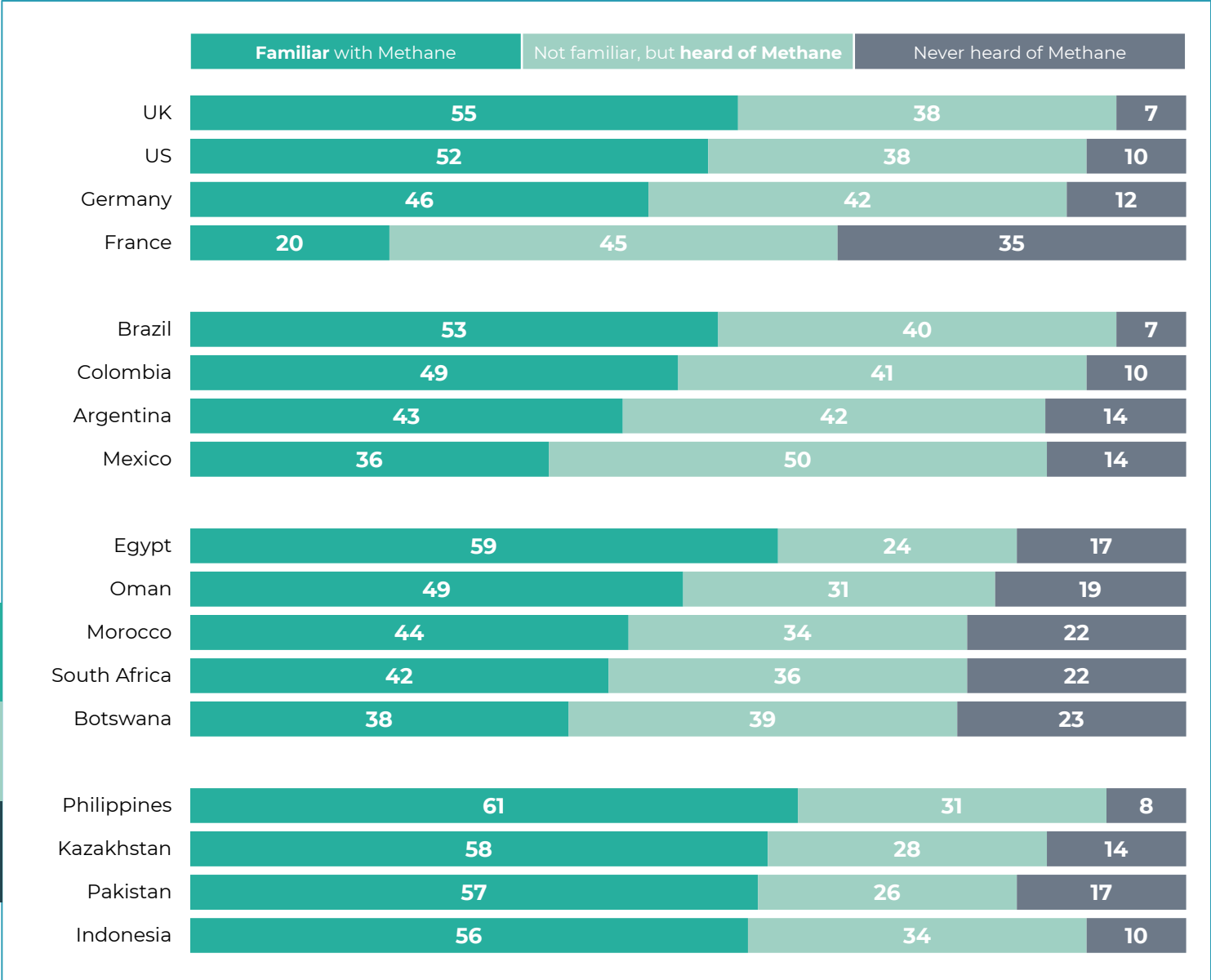
Global Methane Hub, their partners, and allies have a significant gap to close when it comes to views of methane around the world.

Research Dictionary

Familiar = Know something about
% 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.*

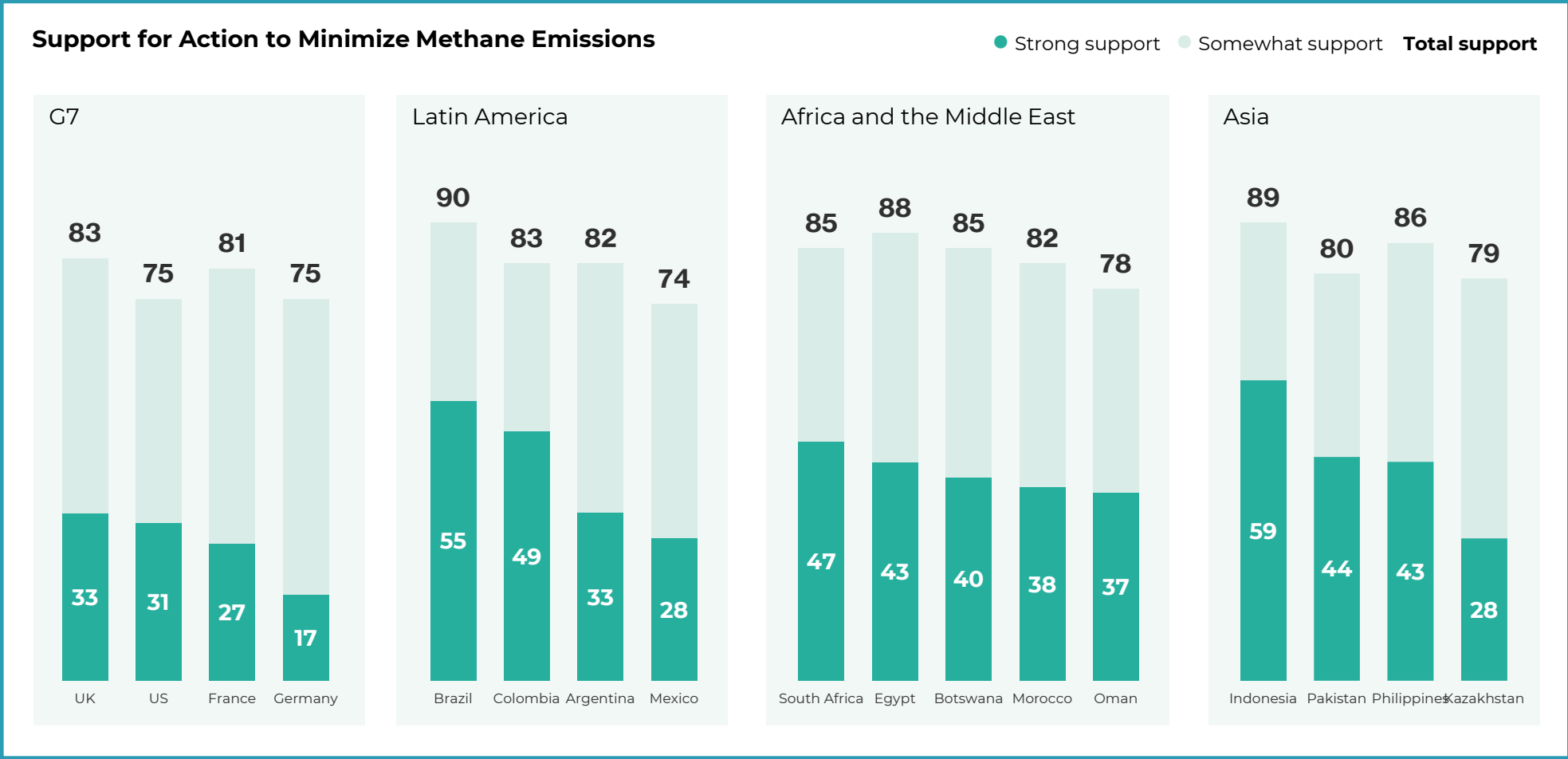


KEY FINDING #1: Familiarity + Intensity of Support

The lack of familiarity with methane, however, does not stand in the way of high overall support for reducing methane emissions.

Nearly 3 in 4 (74%) respondents in all countries surveyed support “actions taken to minimize methane emissions.”

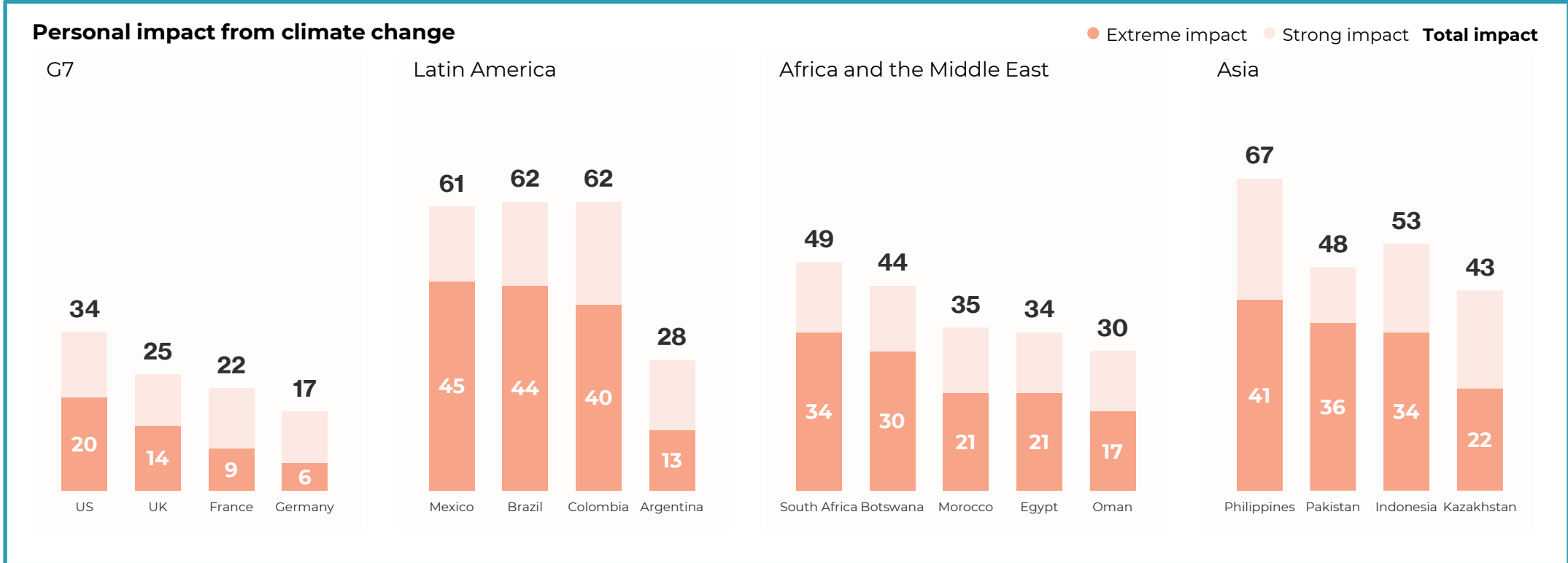
- Total support is high, but strong support is 40% or more 40% in only 8 of 17 surveyed countries.
- Resistance to methane action is low across the board. Even in Mexico, the country with the highest level of opposition, only 10% strongly oppose methane reduction efforts.



KEY FINDING #2: Patterns Across Less Developed Countries

The uneven impacts of climate change on less developed countries likely contribute to their sense of urgency around climate change generally and methane pollution specifically:

- 44% of Brazilians, 41% of Filipinos, and 36% of Pakistanis say climate change has had an extreme impact on their lives. This compares to only 20% of Americans, 14% of Brits, and 6% of Germans who say the same.



Q4. On a scale of 1-5, how much impact, if any, does the changing climate have on your life?
1 – No impact at all on my life, 2 – , 3 – Some impact on my life, 4 – , 5 – Extreme impact on my life

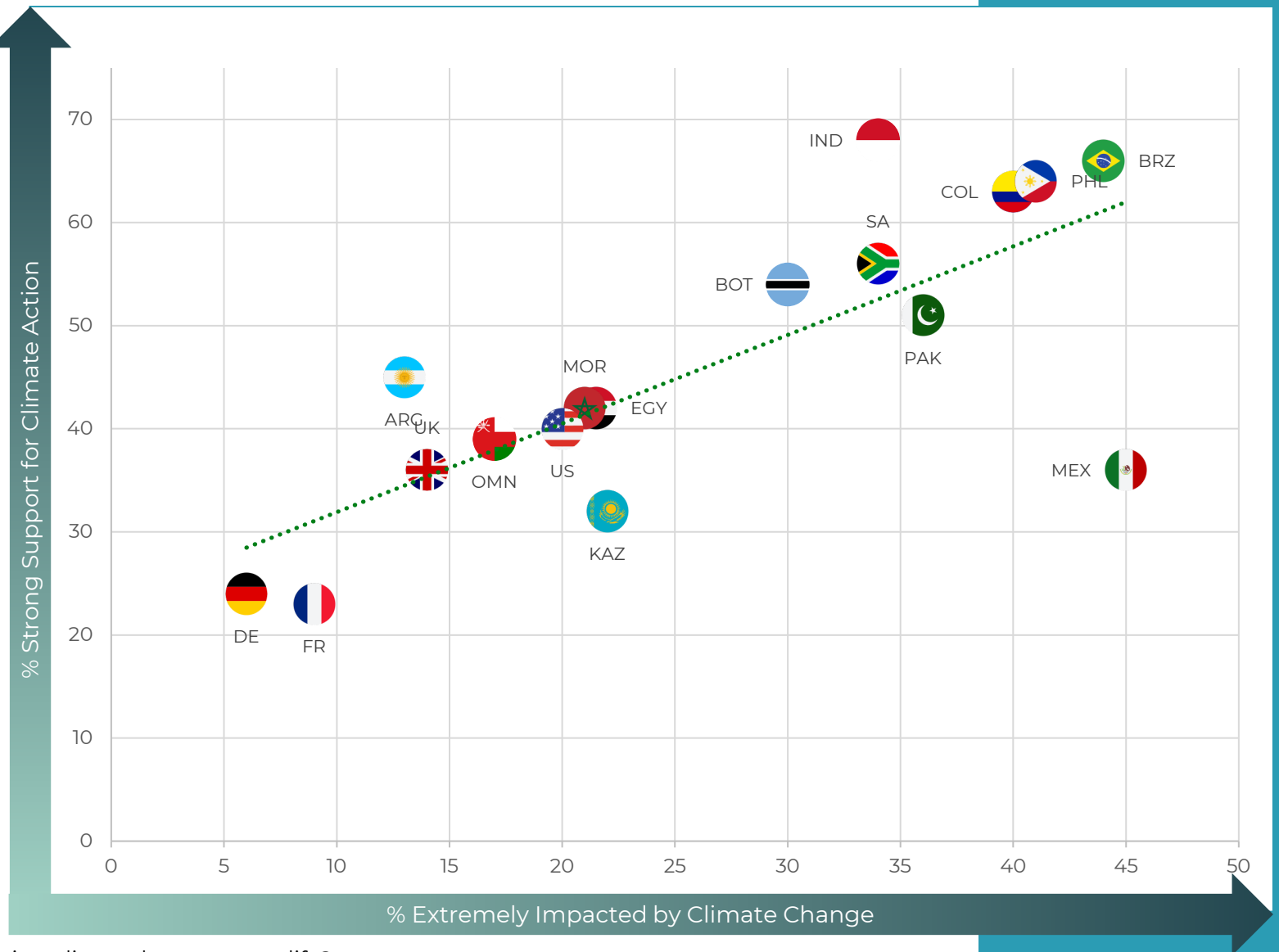
KEY FINDING #2: Patterns Across Less Developed Countries

Less-developed countries, particularly in Latin America, Africa, and Asia, are the most intense in their support for climate action.

- Indonesia (68% strong support), Brazil (66%), and South Africa (56%) exhibit strong enthusiasm for climate change mitigation.
- In contrast, only 23% and 24% of French people and Germans, respectively, strongly support actions to fight climate change.
- Support for fighting climate change increases with perceived climate impact – which is highest in developing countries.

The pattern holds for methane-specific reforms: less developed countries lead the way in support, while highly developed, Western nations display less enthusiasm for methane mitigation.

- Strong support for methane minimization (Q14) exceeds 40% in 8 of 17 countries – all located in the “Global South.”



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?

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

KEY FINDING #3: Other Dynamics On the Ground

Importantly, even though many people report that the changing climate has “an extreme impact” on their lives, environmental priorities including stopping climate change, reducing food waste, and sustainable agriculture are still lower on their priority lists than addressing economic issues.

Top National Priority					
Reducing Poverty	Economic Growth	Lowering Costs and Inflation	Creating New Jobs	National Security and Defense	Food Security
<ul style="list-style-type: none">ArgentinaBrazilKazakhstan	<ul style="list-style-type: none">ColombiaIndonesiaMexicoBotswanaPakistan	<ul style="list-style-type: none">FranceGermanyPhilippinesUnited StatesUnited Kingdom	<ul style="list-style-type: none">South AfricaOman	<ul style="list-style-type: none">Egypt	<ul style="list-style-type: none">Morocco

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 [country].

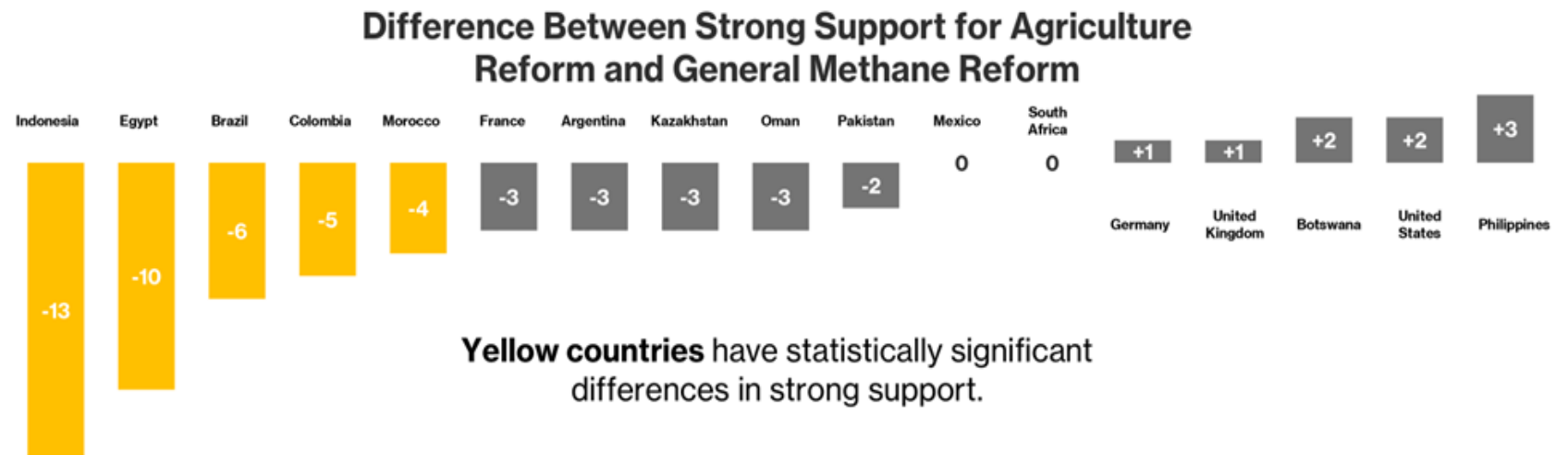
KEY FINDING #4: Sector-specific Action on Methane Emissions

While broad support exists for methane reduction efforts, implementing sector-specific reforms presents a more complex picture. Targeting agriculture, a significant source of methane emissions, is likely to face the most resistance.

This is evident in several countries where support for agricultural methane reforms test noticeably lower than general methane action.

- Egypt: 88% support general methane action, whereas 75% support agriculture-specific methane reform.
- Kazakhstan: 79% support general methane action, whereas 68% support agriculture-specific methane reform.

A look at the differences in intensity of support for general versus agricultural methane reform showcases even starker divides across many countries.



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

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

METHANE POLICIES



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:

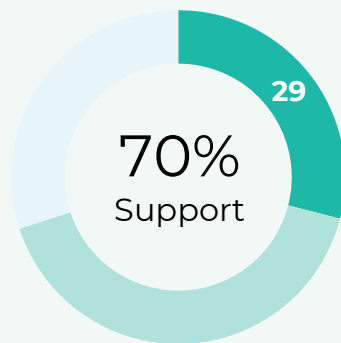
The United Nations Climate Change Conference helps nearly all countries work together to establish goals and agreements to address climate change.

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.

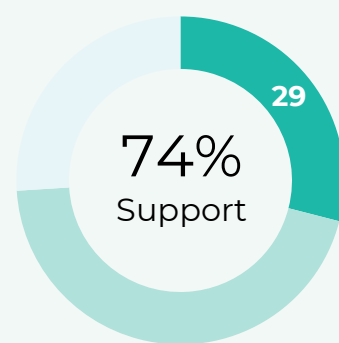
[Your country] currently [does/does not] have a Nationally Determined Contribution plan that includes a specific methane emissions reduction target.

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

United States
(currently has NDC target)

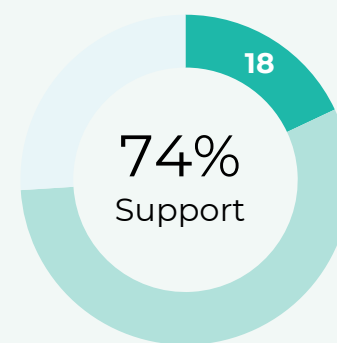


United Kingdom
(currently has NDC target)



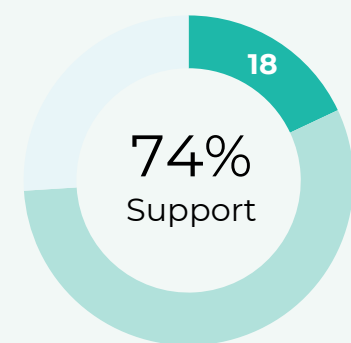
Strong support is **4pts lower** than for methane action

France
(currently has NDC target)



Strong support is **9pts lower** than for methane action

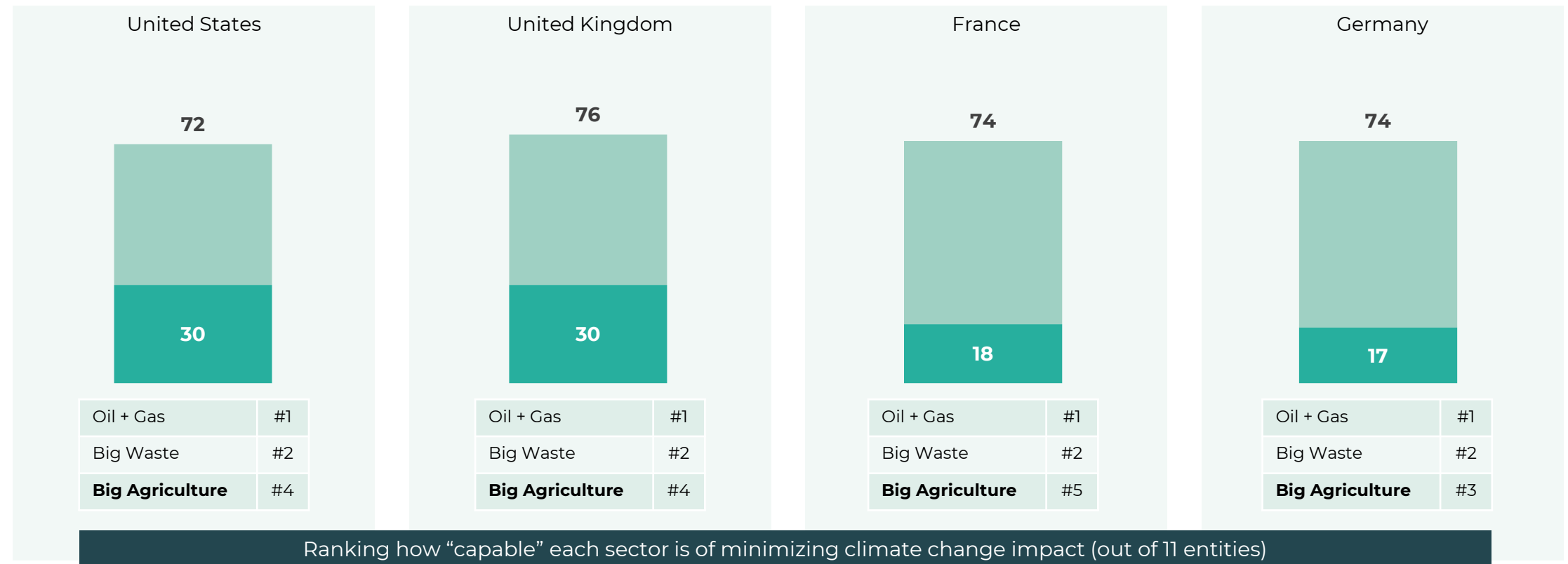
Germany
(currently has NDC target)



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

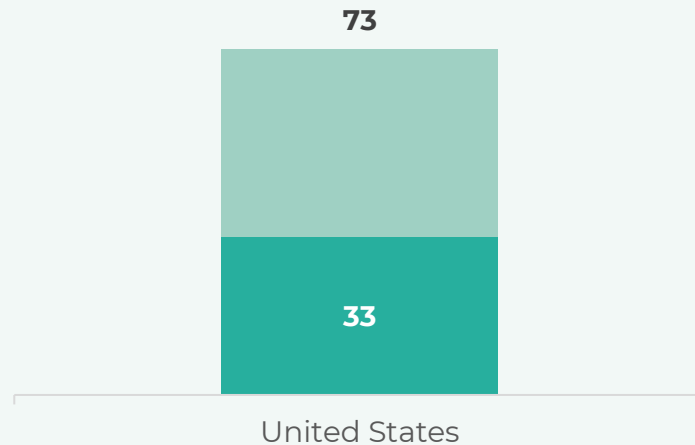


More than 7 in 10 Americans support methane fees for excessive or wasted methane emissions, despite President Trump's move to overturn the Inflation Reduction Act provision

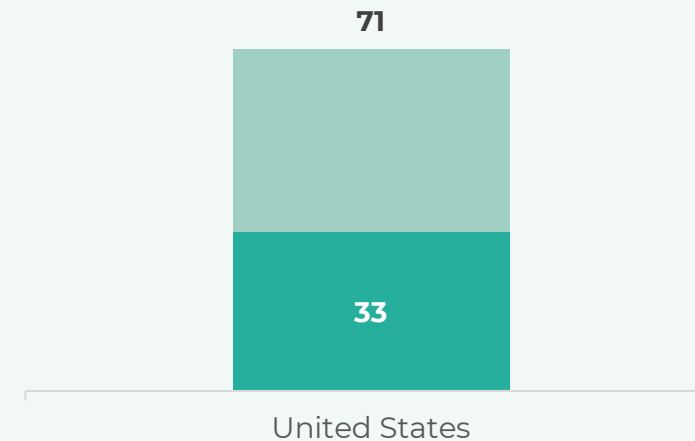
To what extent do you support or oppose the following in [your country]?

● Strong support ● Somewhat support Total support

The implementation of standards that require the oil and gas industry to pay a fee to U.S. taxpayers if they produce more methane pollution than the law allows



The implementation of a fee that oil and gas producers must pay to the U.S. government for wasted methane gas that contributes to pollution



Q17. To what extent do you support or oppose the following in [your country]?

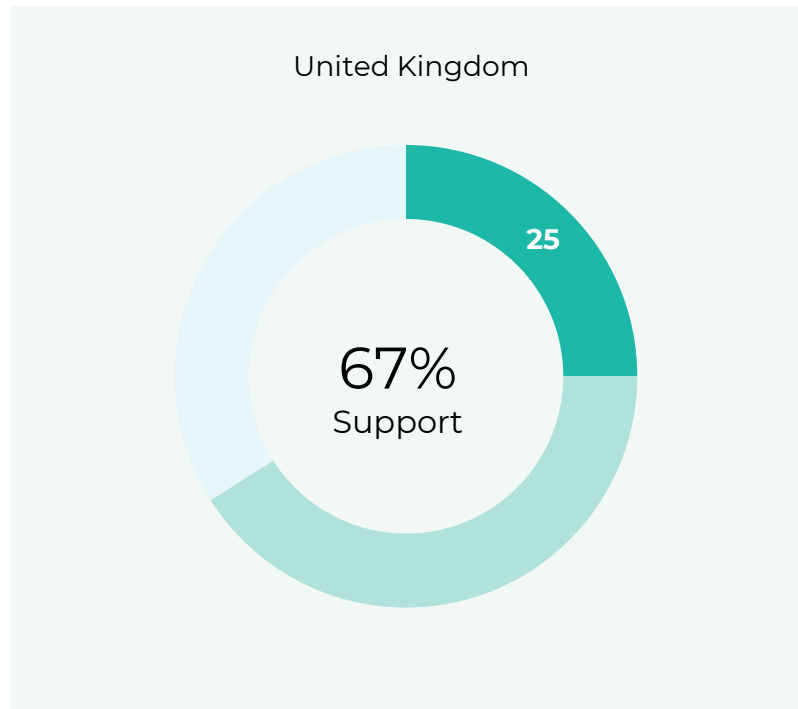
Q17r5. The implementation of standards that require the oil and gas industry to pay a fee to U.S. taxpayers if they produce more methane pollution than the law allows.

Q17r6. The implementation of a fee that oil and gas producers must pay to the U.S. government for wasted methane gas that contributes to pollution.

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

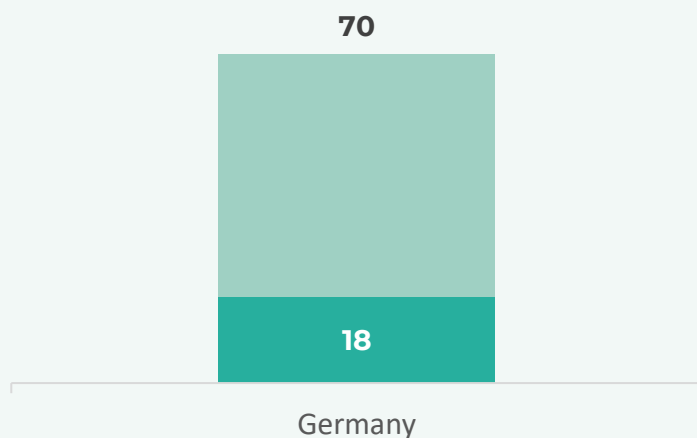


A majority of Germans support both a national methane plan and flaring regulations on energy imports – building a wider base of strong support for these measures will be essential

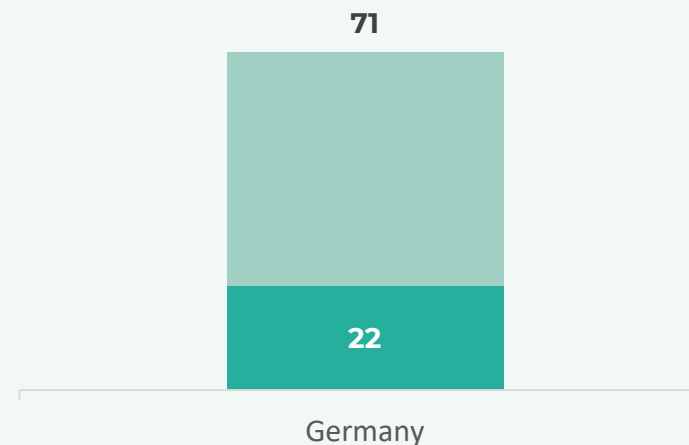
To what extent do you support or oppose the following in [your country]?

● 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



Defining “NDC” boosts intense support for methane reduction, especially in Argentina and Mexico

Support for Specific Methane Target in National NDC Plan

● Strong support ● Somewhat support Total support

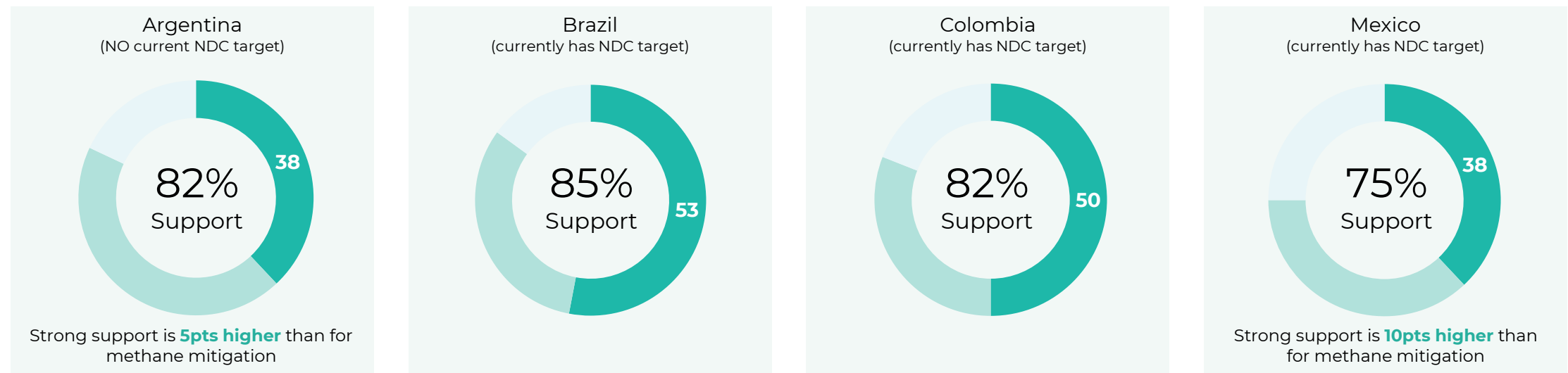
What survey-takers read:

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.

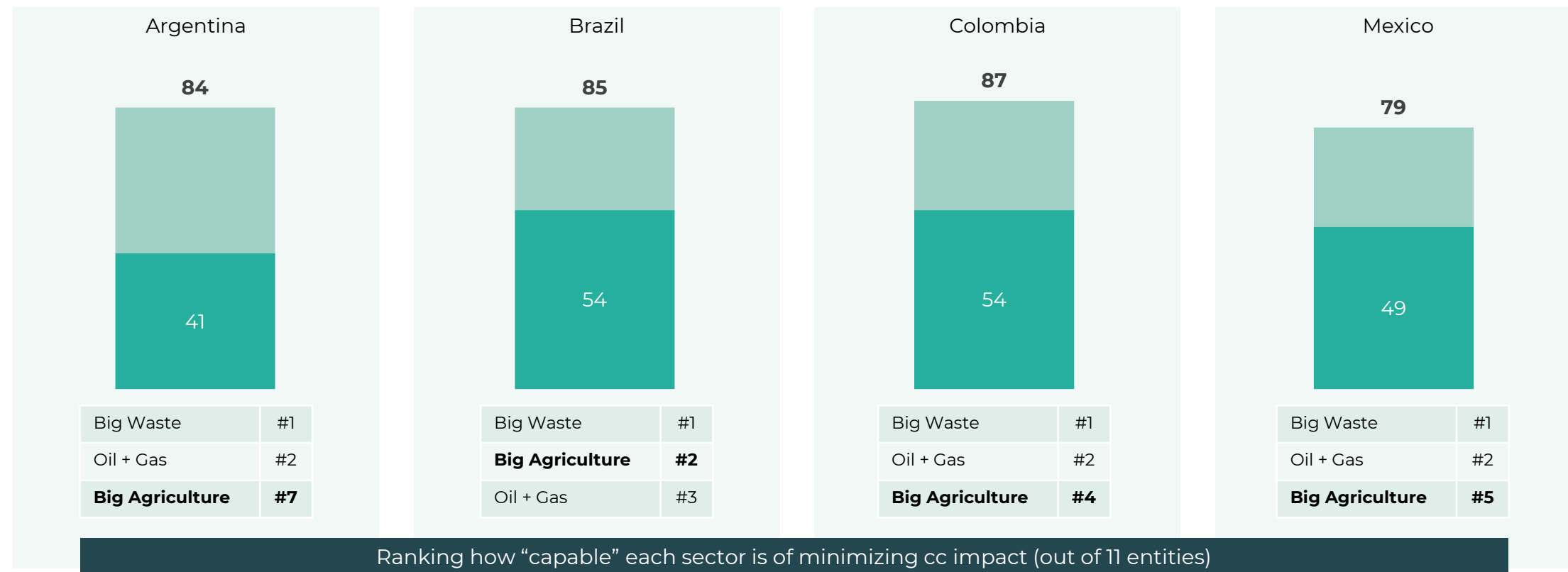
Do you support the inclusion of a specific methane emissions reduction target in [your country’s]’s plan?



Agriculture Policies: Government action to monitor and measure agriculture emissions enjoys strong popularity in LatAm, outpaces general support in Argentina and Mexico

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

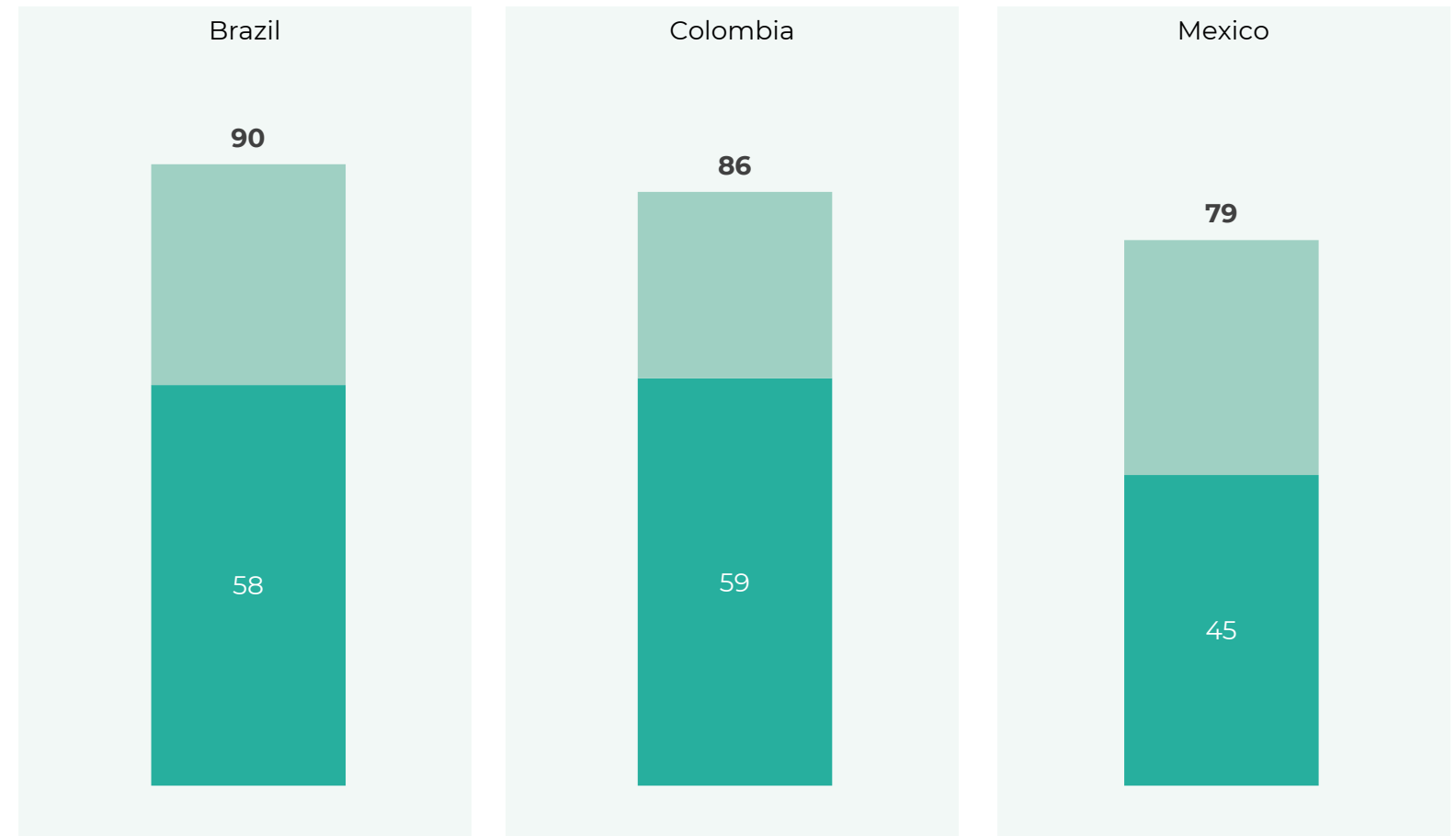
● Strong support ● Somewhat support Total support



Waste Policies:

Waste action policy proposal is likewise popular across the region, far outpacing support for generic methane action

The creation of a policy in [your country] that aims to reduce methane emissions in the waste sector by requiring waste separation, banning organic waste at landfills, and reducing food waste and loss.

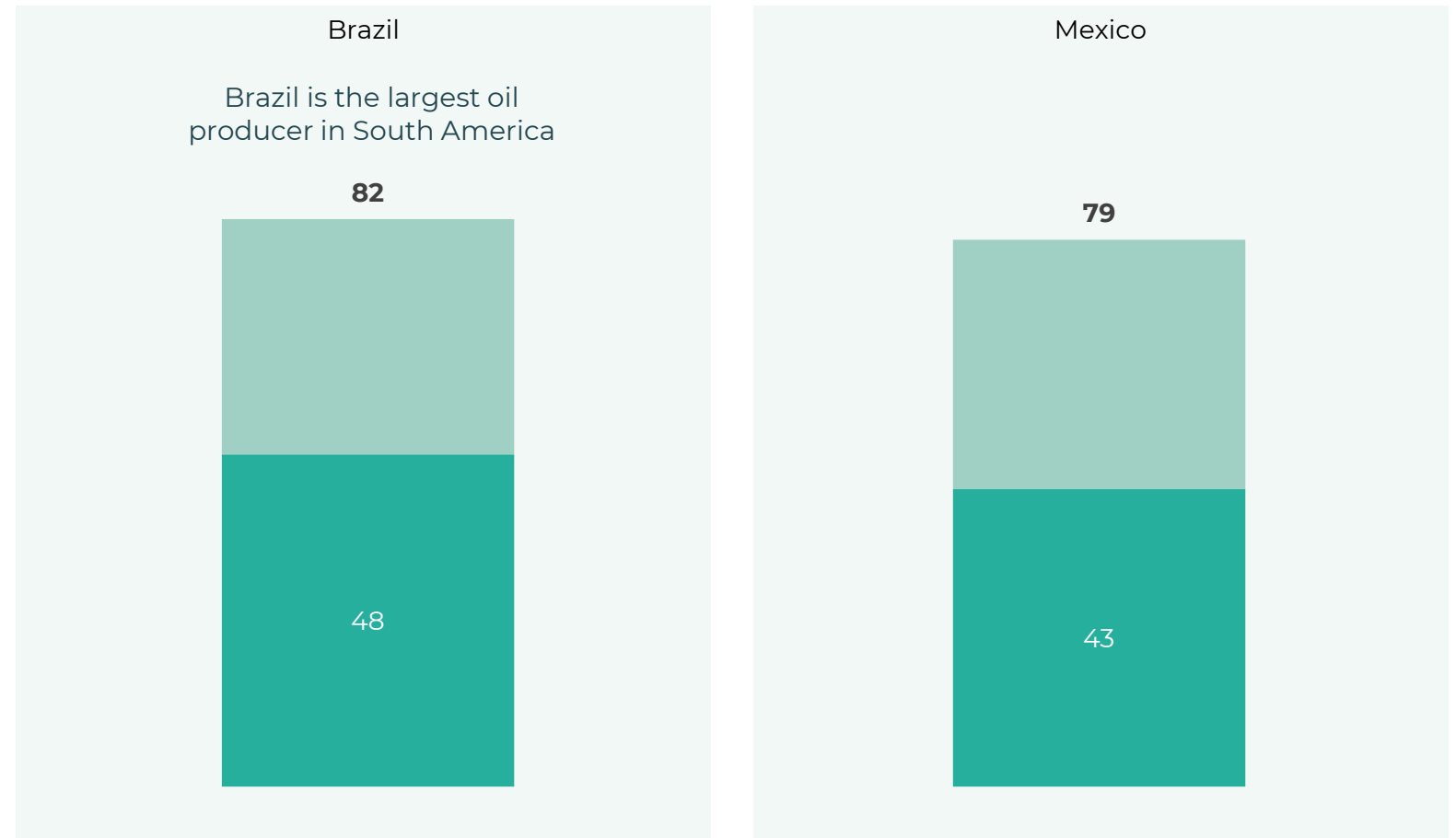


Energy Policies:

Approximately 4 in 5 in both Brazil and Mexico support anti-venting regulations on the oil and gas sector

The creation of a policy in [your Country] that requires the capture and use of wasted methane emissions in the oil and gas supply chain.

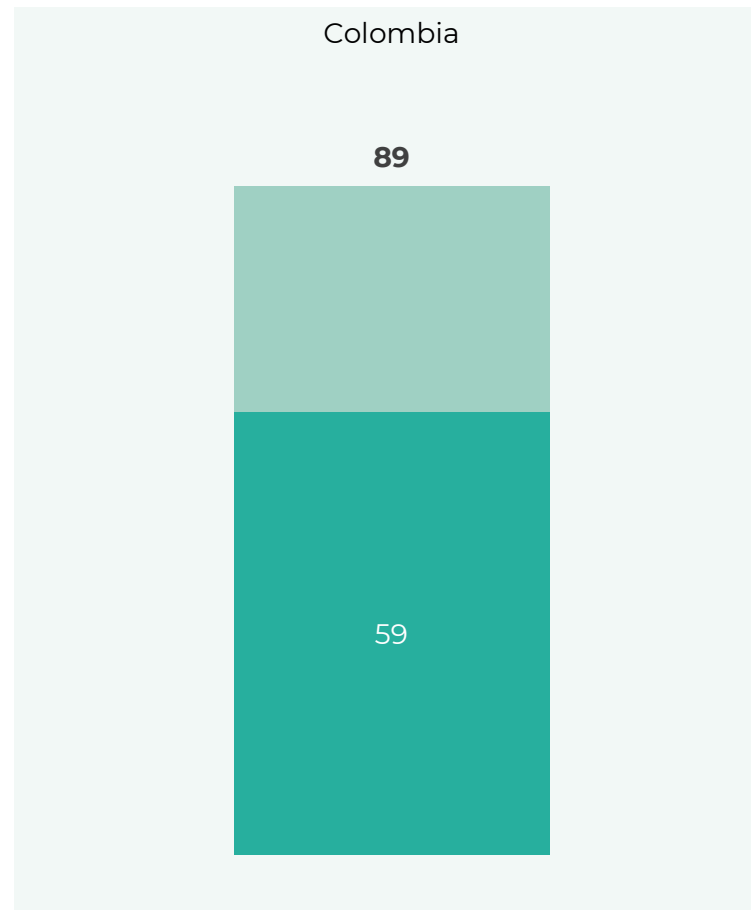
● Strong support ● Somewhat support Total support



Energy Policies:

Colombians make a clear call for transparency from the ANH; with 59% strong support, it ties for single most popular country-level policy tested

Publication of the results and emissions cuts from Colombia's existing methane regulations on the oil and gas industries by the Agencia Nacional de Hidrocarburos (ANH).



The region is mixed: defining an NDC plan increases intensity by +5pts strong support in Botswana, but leads to significant declines in South Africa (-11pts), Morocco (-7pts) and Egypt (-4pts)

Support for Specific Methane Target in National NDC Plan

● Strong support ● Somewhat support Total support

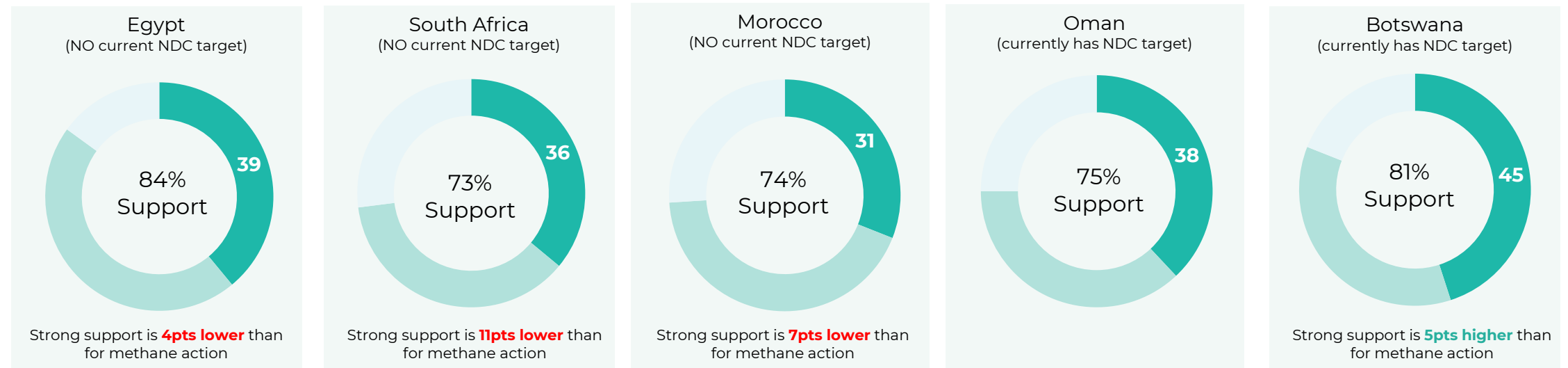
What survey-takers read:

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.

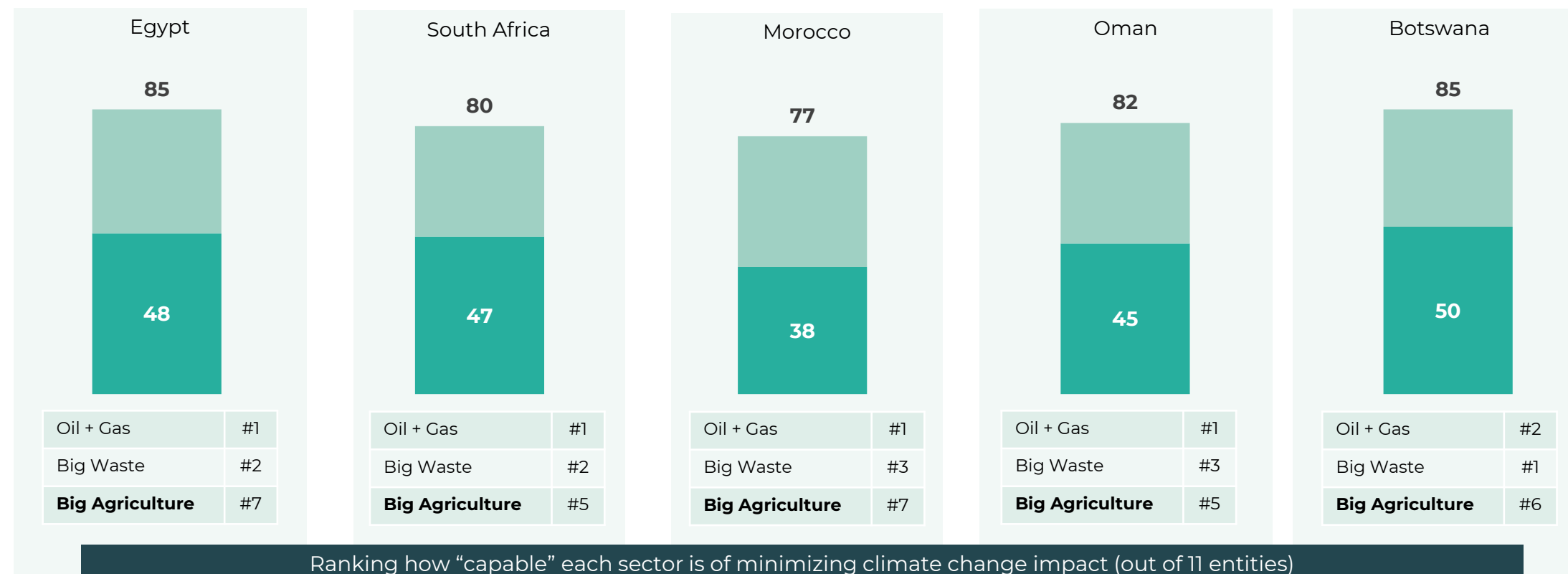
Do you support the inclusion of a specific methane emissions reduction target in [your country's] plan?



Agriculture Policy: While support for policy action tends to be weaker in the agriculture sector compared to general methane action, we observe broad support for tracking Ag-related methane emissions region-wide

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

● Strong support ● Somewhat support Total support

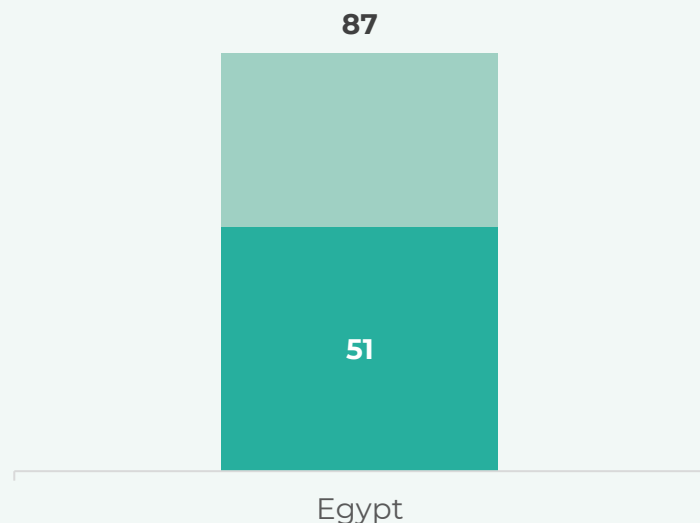


Energy Policies: There is intense support and little opposition to energy reform in Egypt – both for mandatory emissions tracking and a methane reduction fund

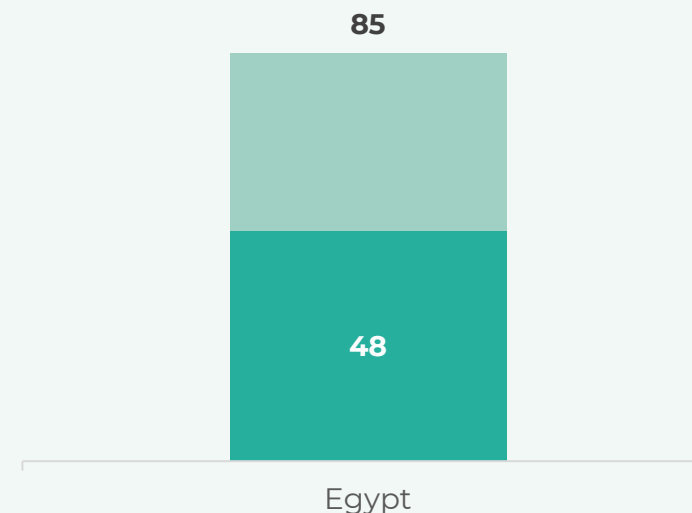
To what extent do you support or oppose the following in [your country]?

● Strong support ● Somewhat support Total support

A requirement for the National Oil Company of Egypt to track and report methane emissions based on existing environmental regulations



The creation of a methane reduction fund by the Egyptian government, which would be funded by tax revenues from the oil and gas industry, to invest in low-methane emissions energy technology



Q17. To what extent do you support or oppose the following in [your country]?

Q17r7. A requirement for the National Oil Company of Egypt to track and report methane emissions based on existing environmental regulations.

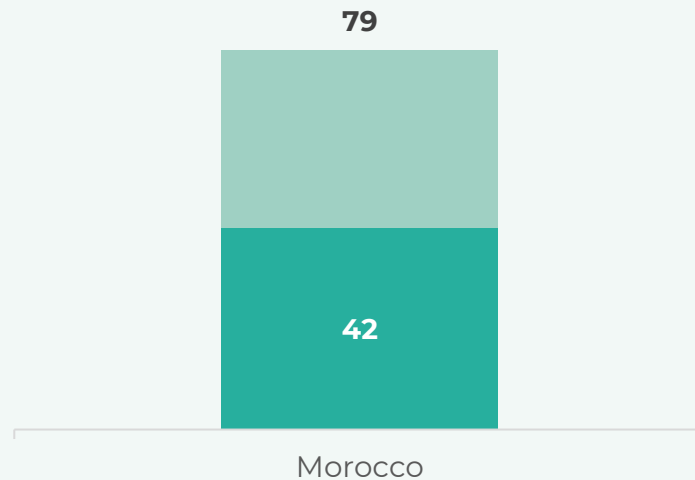
Q17r8. The creation of a methane reduction fund by the Egyptian government, which would be funded by tax revenues from the oil and gas industry, to invest in low-methane emissions energy technology.

Moroccans widely support the promotion of renewable energy, but this support is somewhat muted (-9pts strong support) when a GHG tax is introduced

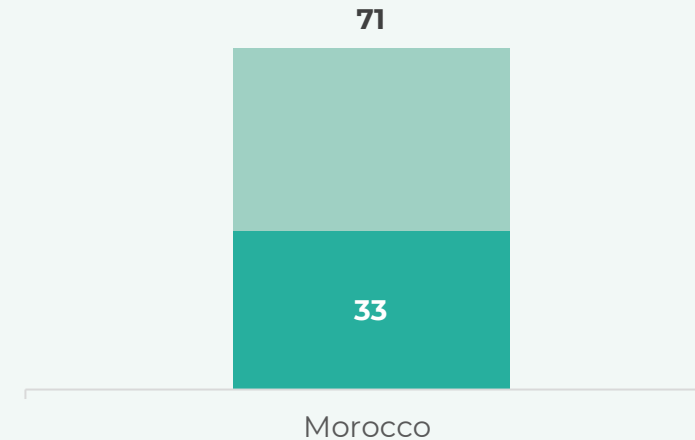
To what extent do you support or oppose the following in [your country]?

● Strong support ● Somewhat support Total support

An expansion of Morocco's existing Renewable Energy Sources Law which would promote the use of new renewable energy sources including solar, wind, hydropower, and biogas



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



Q17. To what extent do you support or oppose the following in [your country]?

Q17r10. An expansion of Morocco's existing Renewable Energy Sources Law which would promote the use of new renewable energy sources including solar, wind, hydropower, and biogas.

Q17r11. Implementation of a tax on greenhouse gas emissions arising from various sectors of industry, including agriculture, energy, and waste management.

Opposing our findings in LatAm, specific methane targets in NDC plans are less popular across the Asia than general methane action, especially in Indonesia

Support for Specific Methane Target in National NDC Plan

● Strong support ● Somewhat support Total support

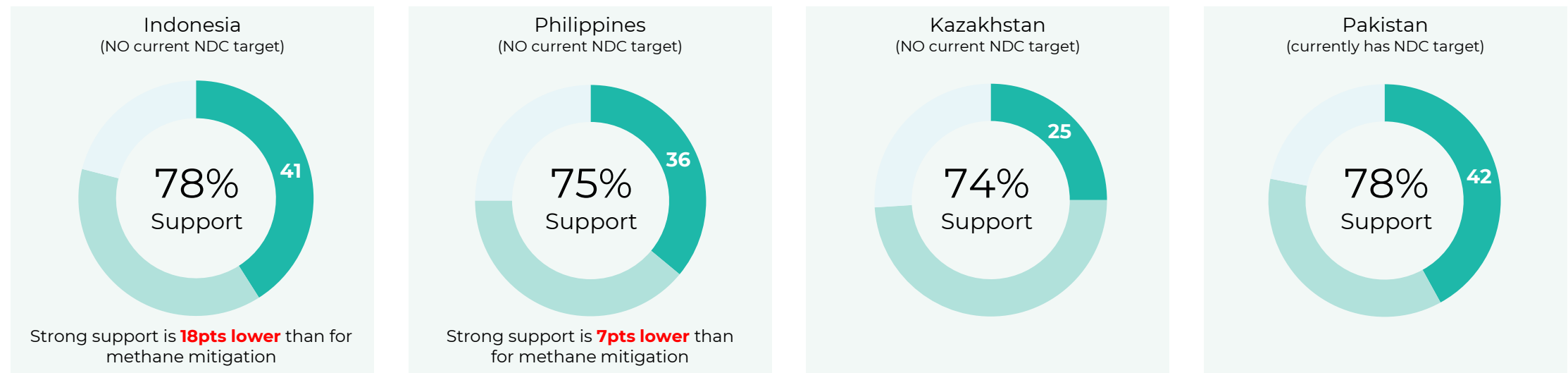
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The United Nations Climate Change Conference helps nearly all countries work together to establish goals and agreements to address climate change.

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.

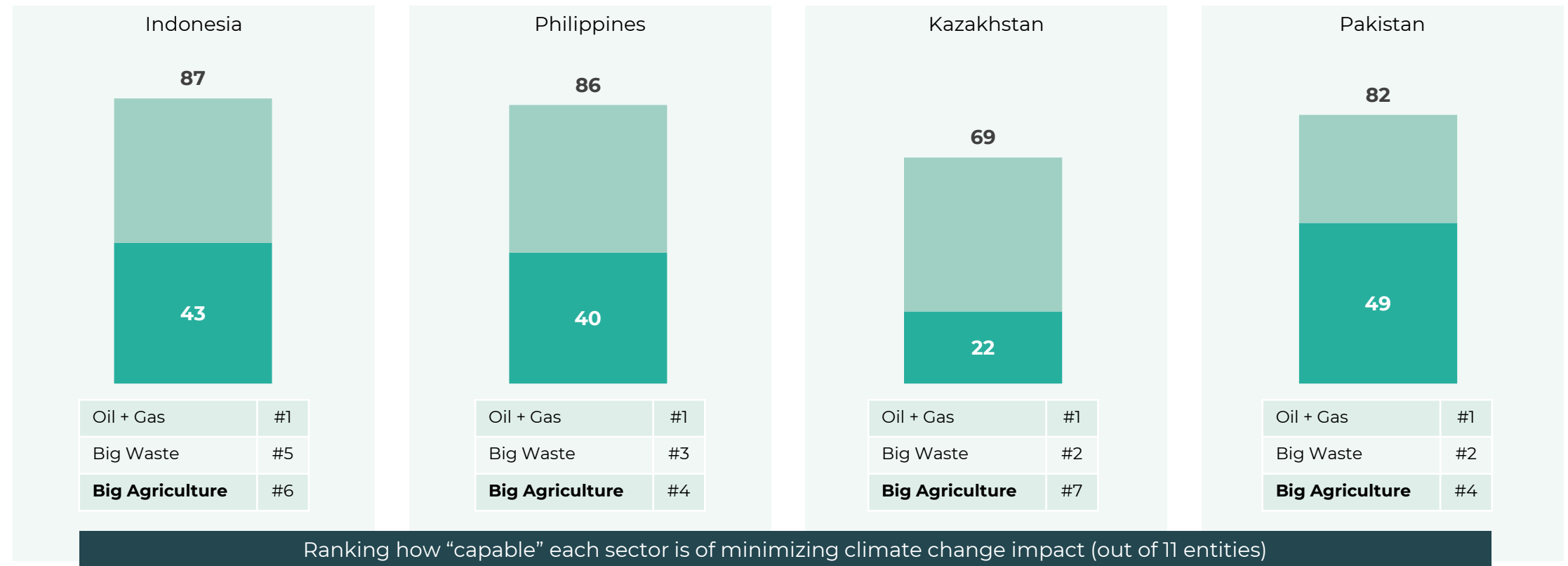
Do you support the inclusion of a specific methane emissions reduction target in [your country's] plan?



Agriculture Policy: There is little opposition across Asia to emissions tracking in the agriculture sector, but support intensity drops in Indonesia and Kazakhstan compared to general methane action

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

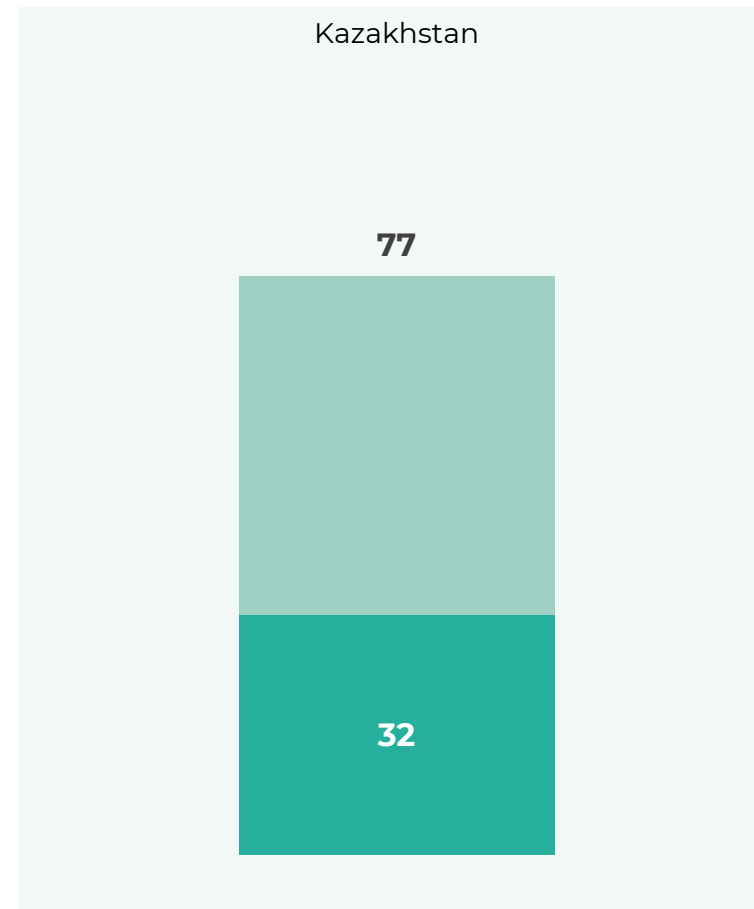
● Strong support ● Somewhat support Total support



Energy Policy: In Kazakhstan, emissions tracking for the oil & gas industry delivers +10pts strong support and +8pts total support compared to an identical policy in agriculture

The creation of a program to monitor and measure methane emissions from the oil and gas industry in Kazakhstan.

● Strong support ● Somewhat support Total support

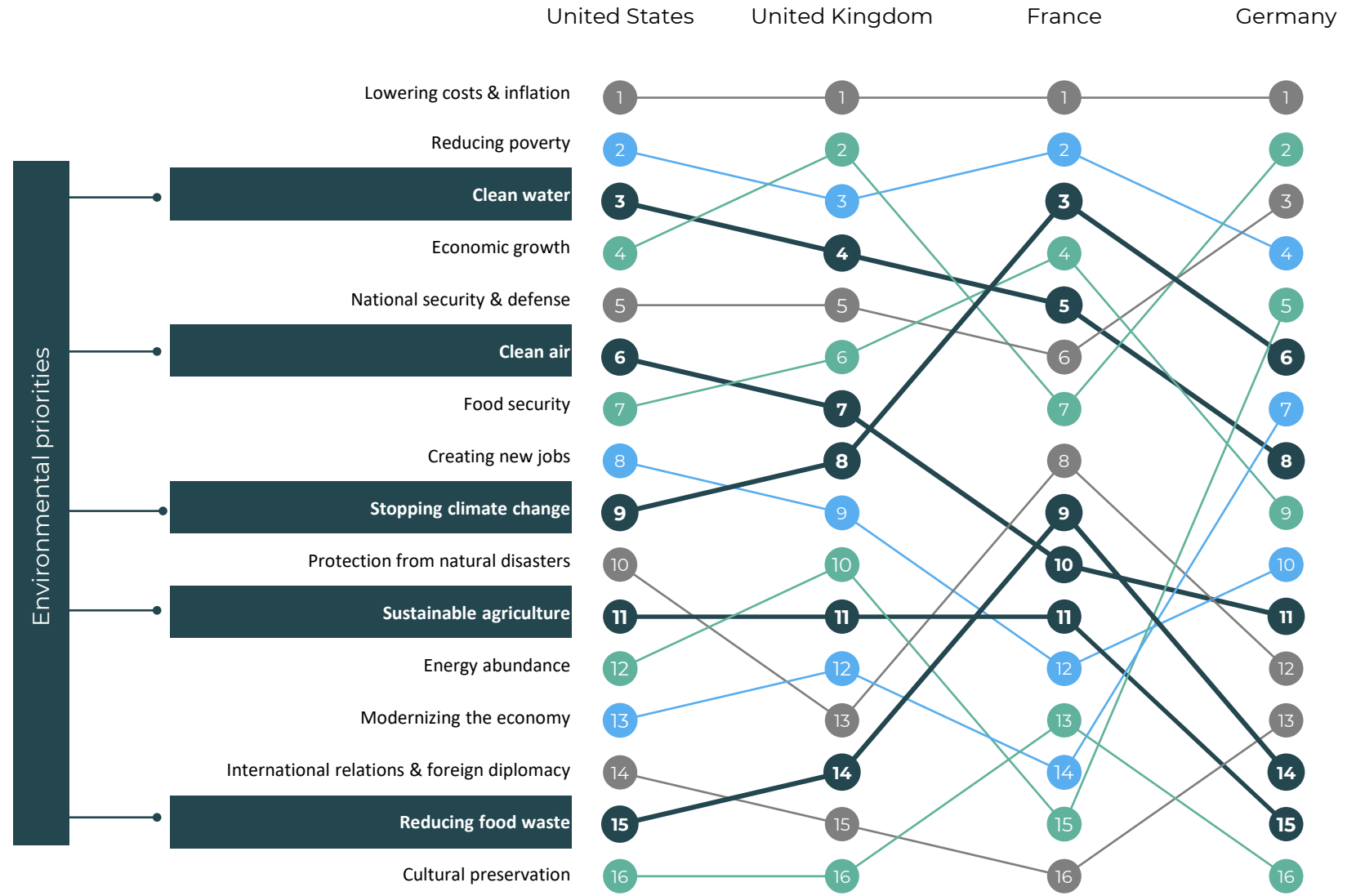


National Priorities

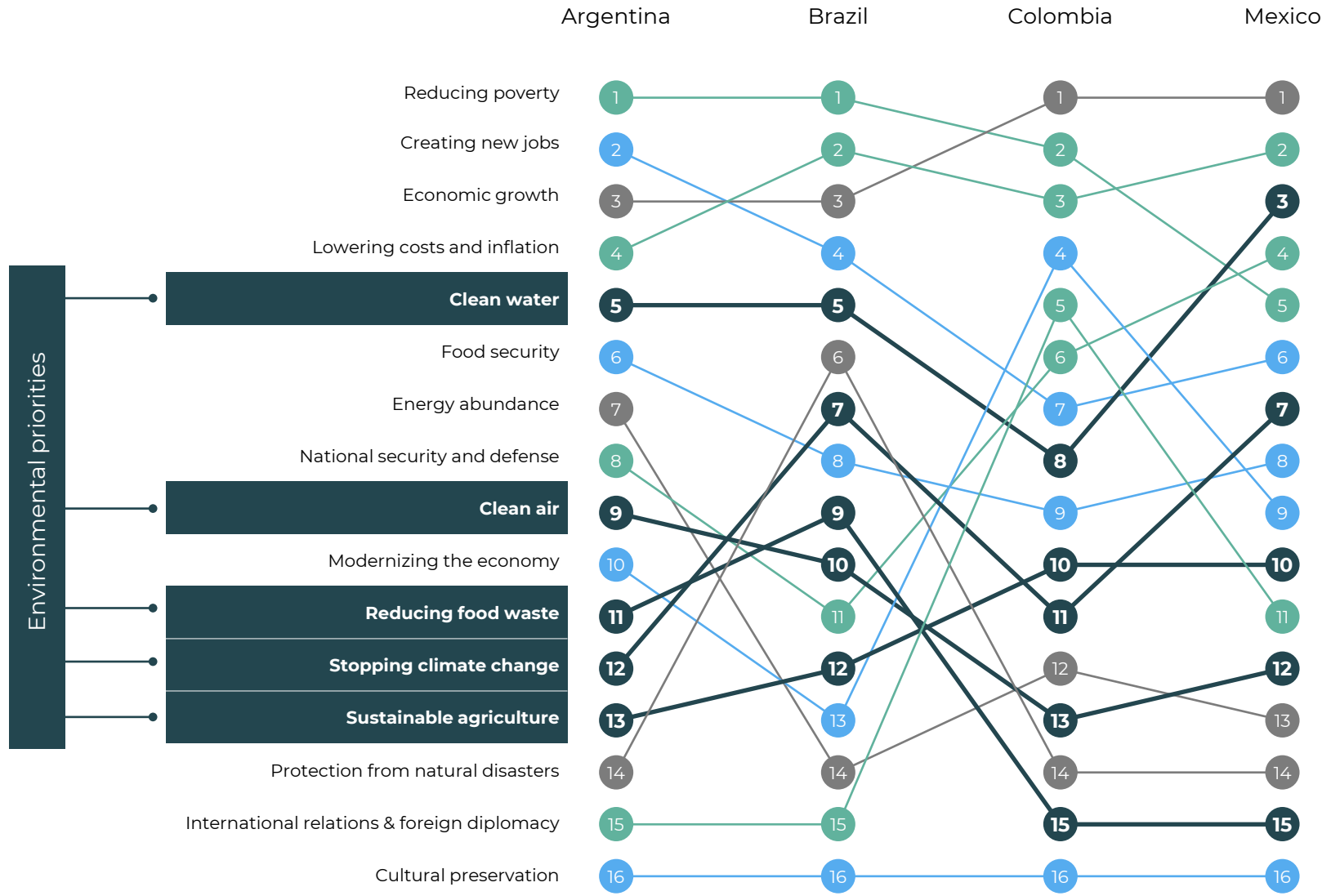


While inflation dominates priorities across the G7, climate change ranks among the top 3 concerns in France; in the US, clean water shares this high level of concern, highlighting regional differences in environmental priorities

National Priorities

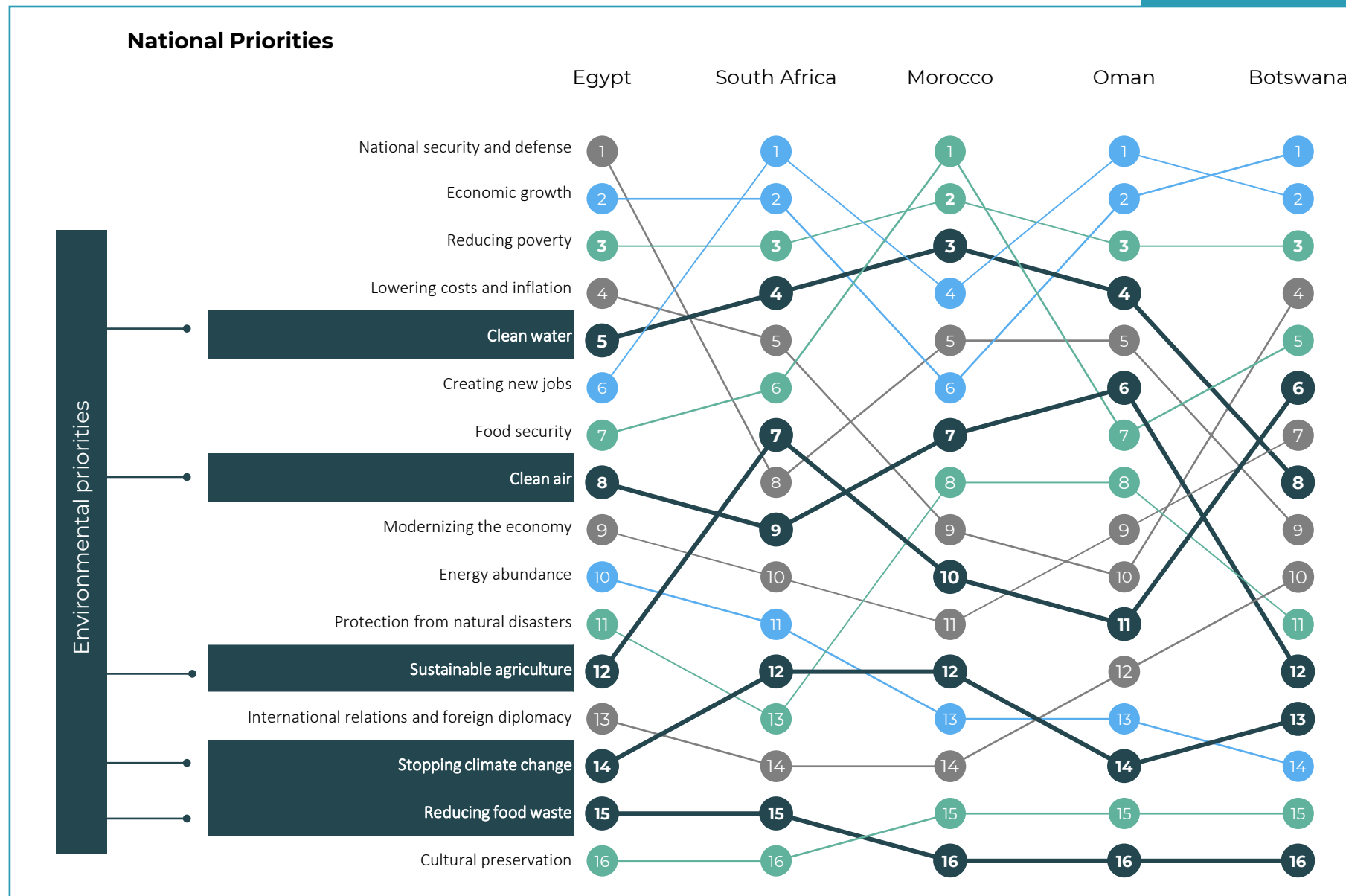


National Priorities



While economic concerns are top priorities, access to clean water is the most important environmental issue in every Latin American nation

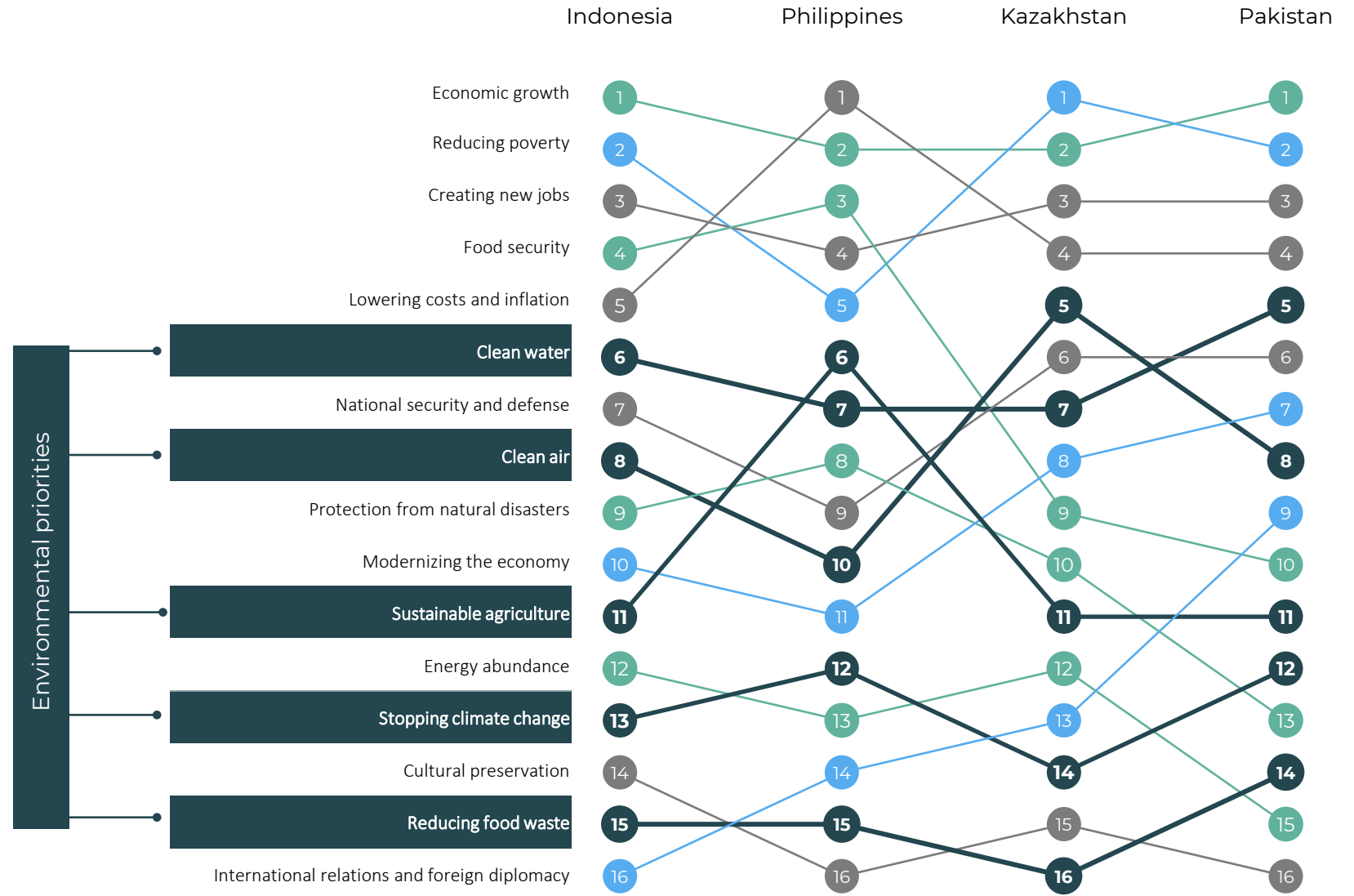
Stopping climate change is stated as a lower priority than economic and societal concerns (defense in Egypt, food security in Morocco) across Africa and the Middle East, but clean water is an urgent priority



Economic advancement dominates Asia's top five priorities

- **Economic growth, creating new jobs, and reducing poverty** and dominate the top government priorities for action across the region
- The most pressing environmental priorities are **clean water and clean air**, which rank 5th in Pakistan and Kazakhstan (respectively)
- **Stopping climate change is a lower priority in the region**—ranked in the bottom quartile in all Asian countries

National Priorities

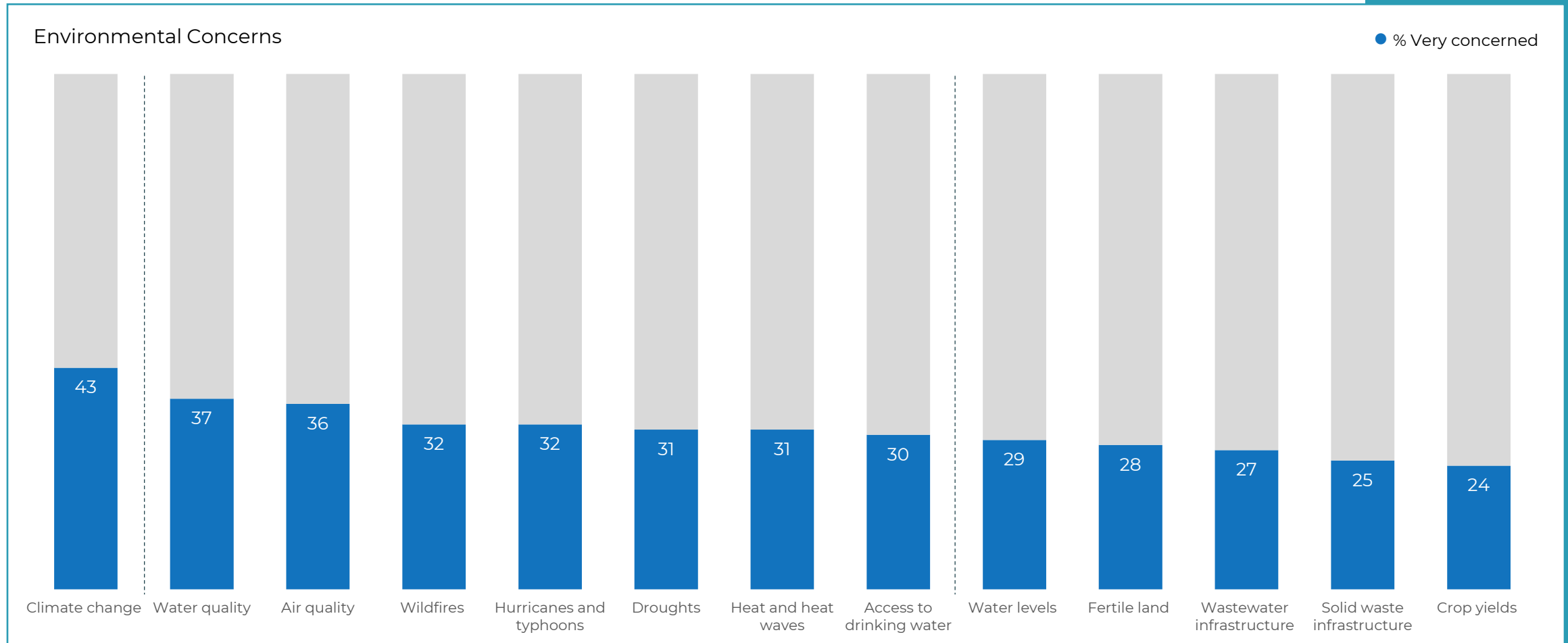


CONCERNS, MESSENGERS, AND INSTITUTIONS

G7 Region

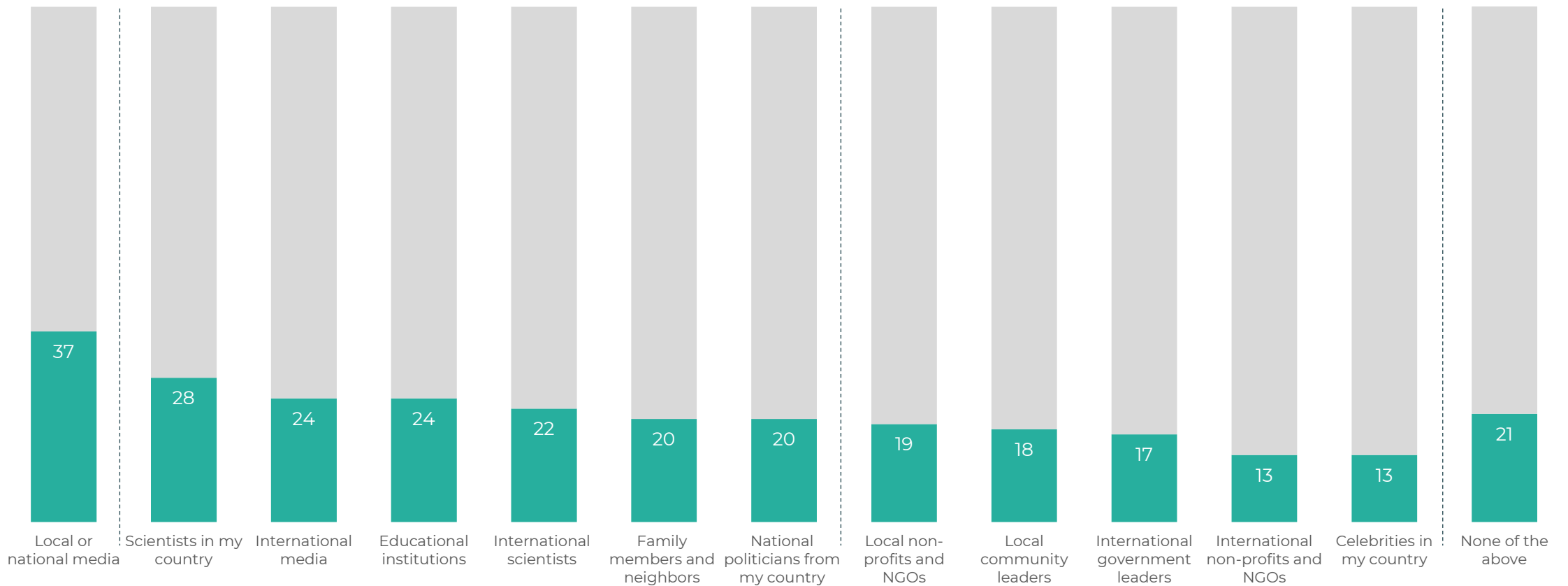


Americans' top environmental concern is climate change, followed by air and water quality; all other issues have less than one-third very concerned



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

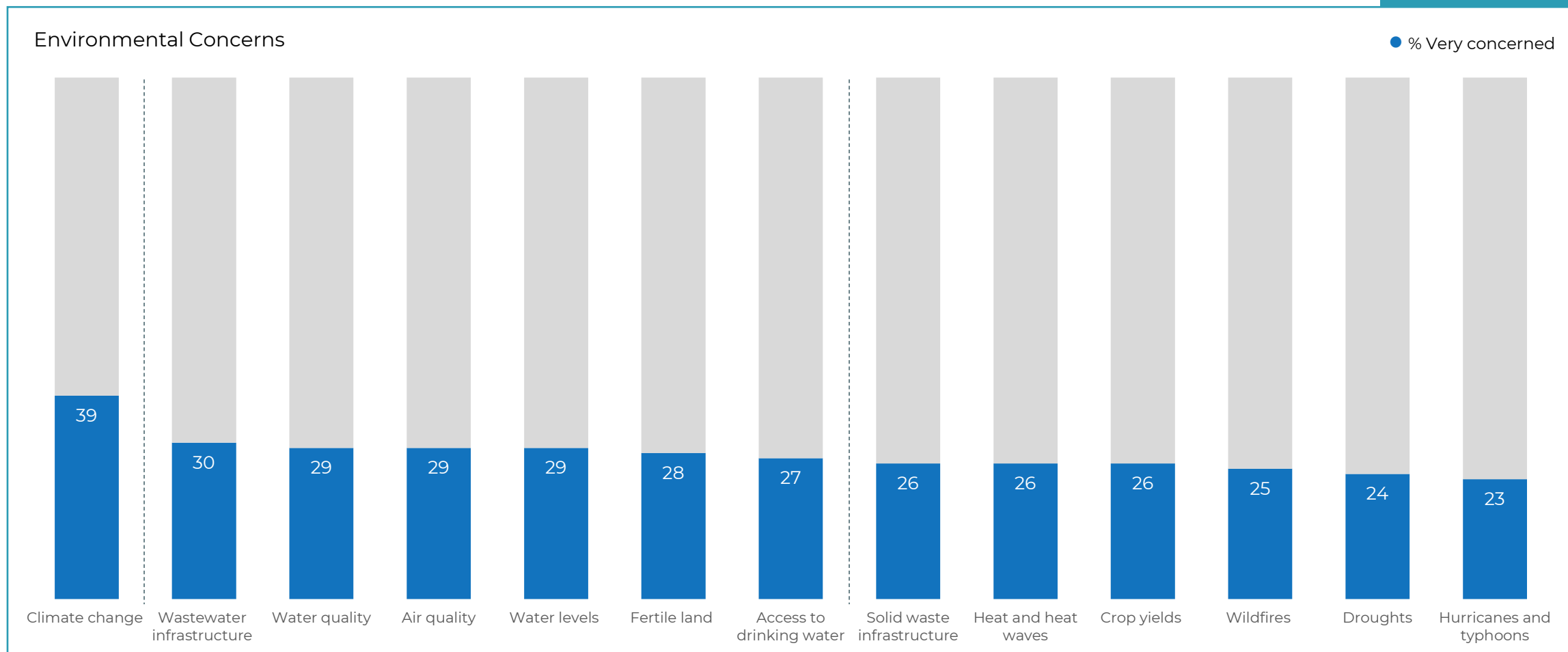
Climate Change Information Sources



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

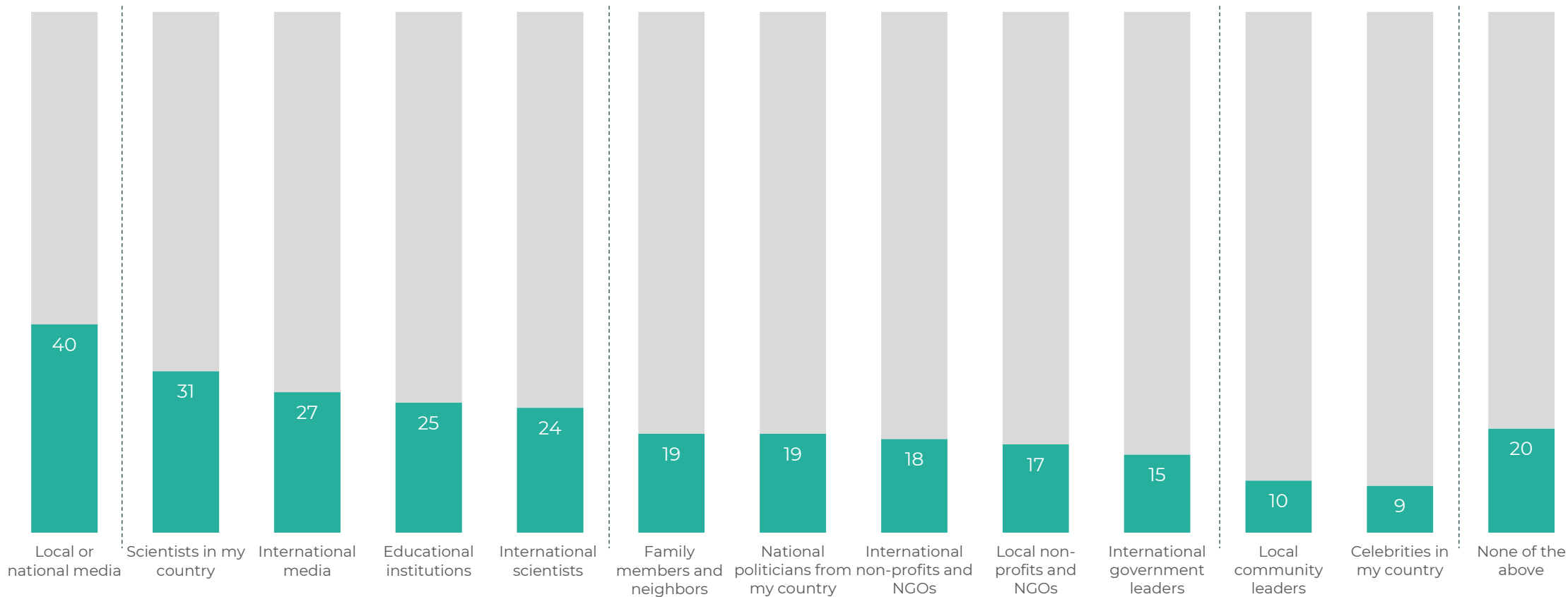
Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Large agricultural producers	#3	#3	National governments
National governments	#4	#4	Large agricultural producers
International/regional governmental systems	#5	#5	Local/state/regional governments
Local/state/regional governments	#6	#6	International/regional governmental systems
Individual citizens	#7	#7	International non-government organizations
International non-government organizations	#8	#8	Individual citizens
Local farmers	#9	#9	Financial institutions
Financial institutions	#10	#10	Local farmers
Small businesses	#11	#11	Small businesses

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

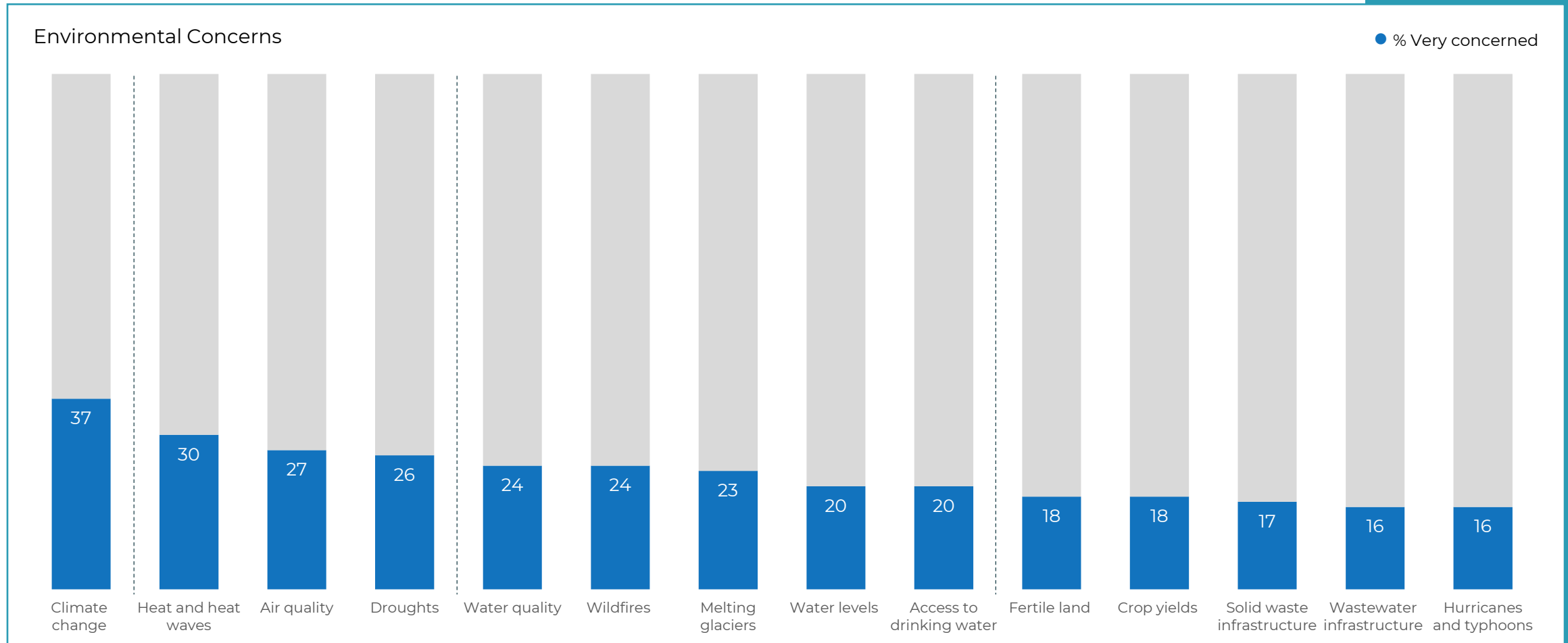
Climate Change Information Sources



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

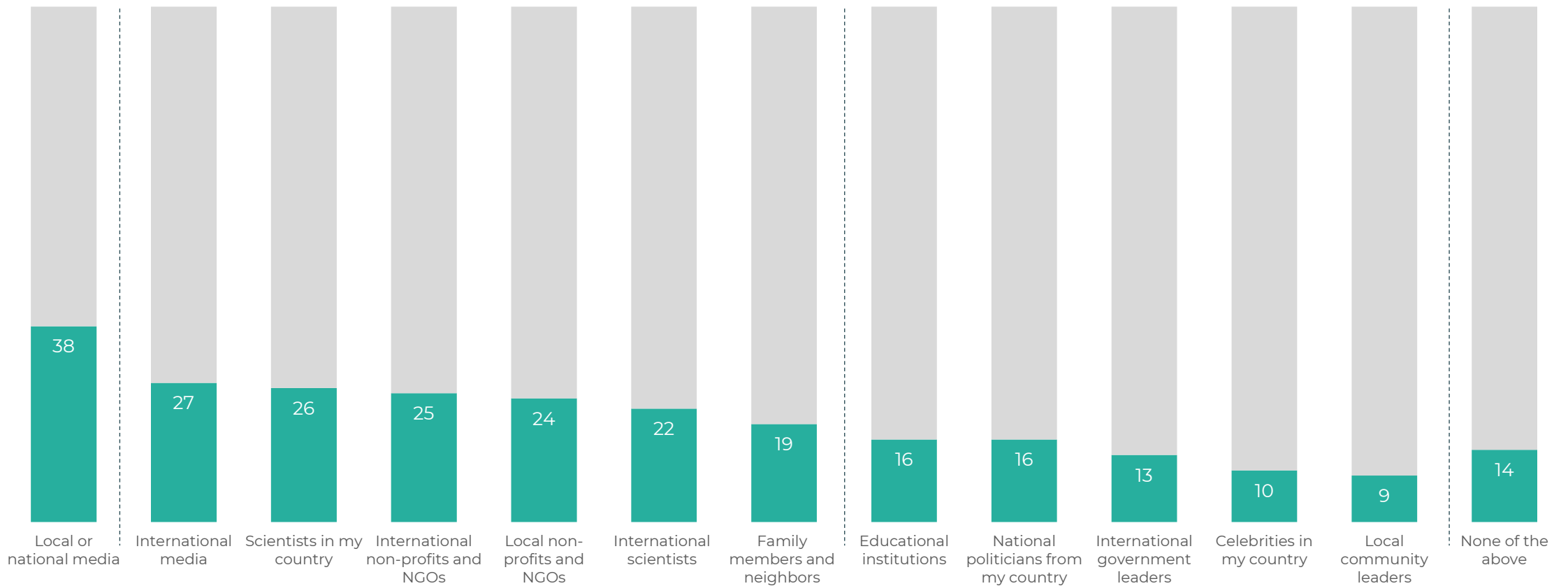
Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Large agricultural producers	#3	#3	National governments
National governments	#4	#4	Large agricultural producers
International/regional governmental systems	#5	#5	International/regional governmental systems
Individual citizens	#6	#6	International non-government organizations
Local/state/regional governments	#7	#7	Local/state/regional governments
Local farmers	#8	#8	Financial institutions
International non-government organizations	#9	#9	Individual citizens
Financial institutions	#10	#10	Local farmers
Small businesses	#11	#11	Small businesses

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



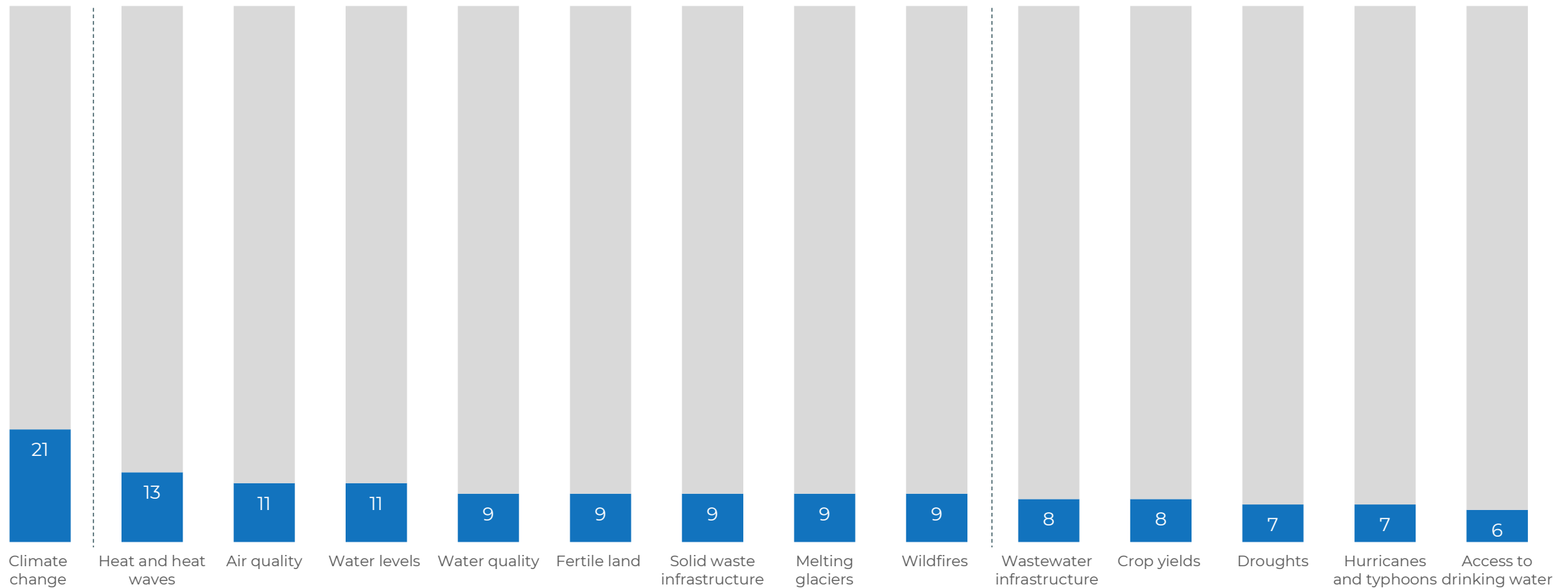
Like other G7 countries, France blames large corporations for environmental harm; however agricultural producers are seen as less capable to mitigate climate change than governments

Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Large agricultural producers	#3	#3	National governments
International/regional governmental systems	#4	#4	International/regional government systems
Individual citizens	#5	#5	Large agricultural producers
National governments	#6	#6	International non-government organizations
Local/state/regional governments	#7	#7	Individual citizens
International non-government organizations	#8	#8	Local farmers
Local farmers	#9	#9	Local/state/regional governments
Financial institutions	#10	#10	Small businesses
Small businesses	#11	#11	Financial institutions

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

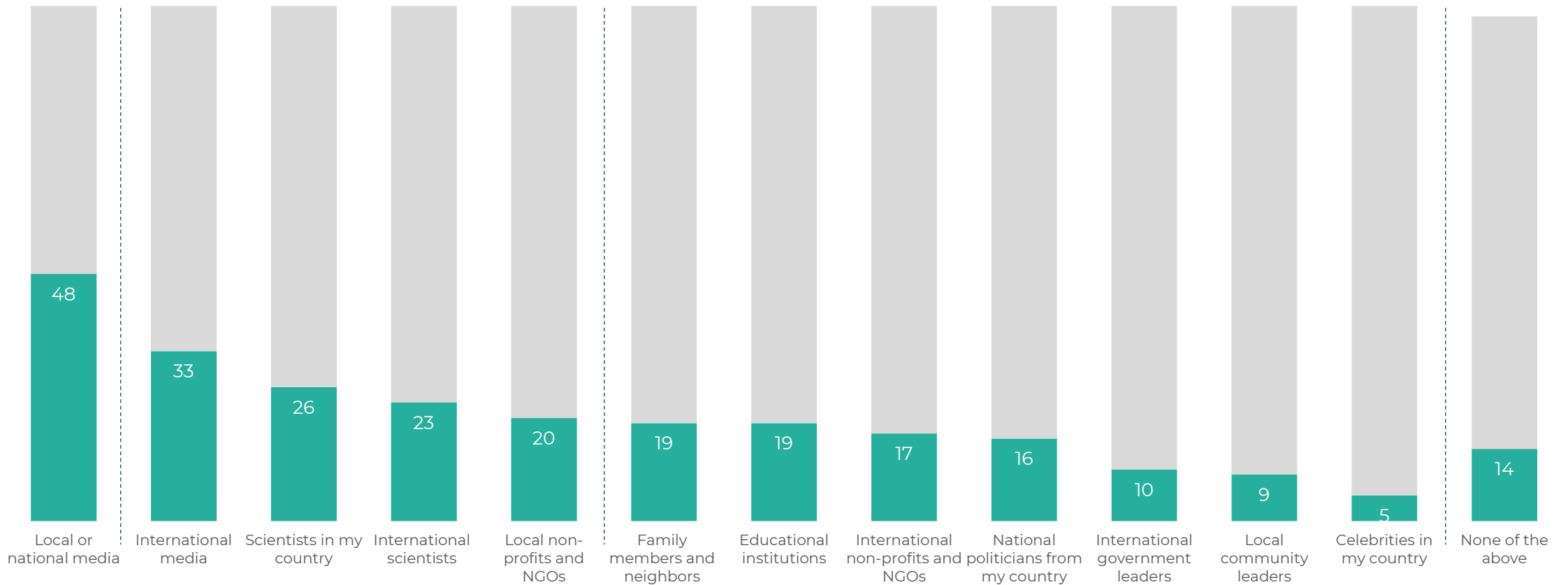
Environmental Concerns

● % Very concerned



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

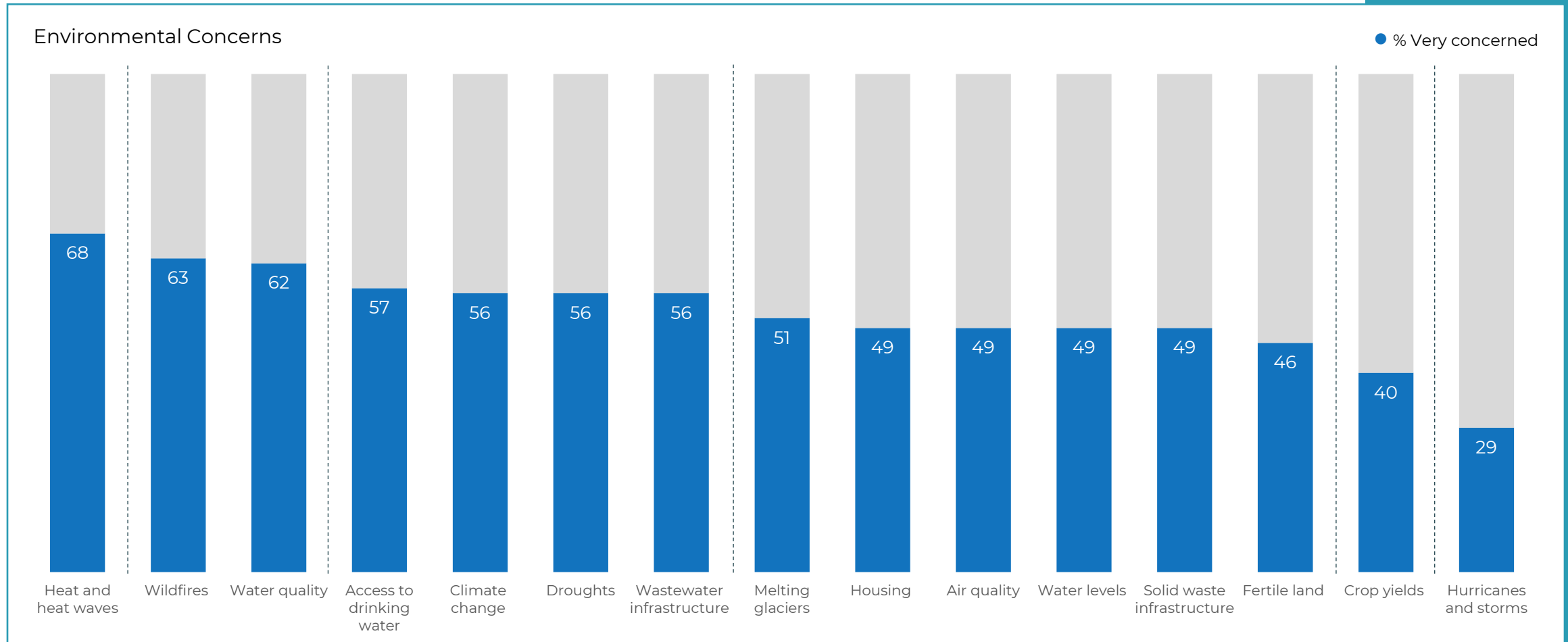
Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Large agricultural producers	#3	#3	Large agricultural producers
International/regional governmental systems	#4	#4	National governments
Individual citizens	#5	#5	International/regional governmental systems
National governments	#6	#6	Local/state/regional governments
Local/state/regional governments	#7	#7	International non-government organizations
Local farmers	#8	#8	Individual citizens
International non-government organizations	#9	#9	Local farmers
Small businesses	#10	#10	Financial institutions
Financial institutions	#11	#11	Small businesses

APPENDIX: CONCERNS, MESSENGERS, & INSTITUTIONS

LATAM Region

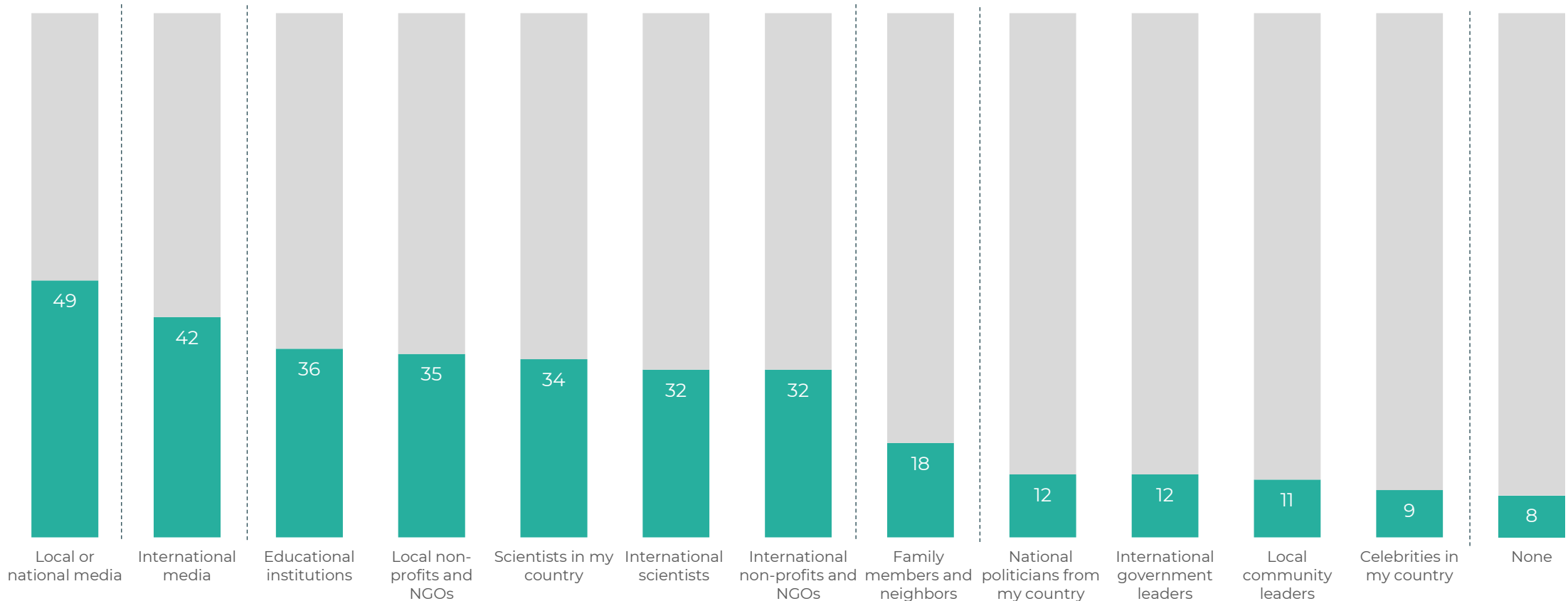


Argentines concern for climate change is the lowest in Latin America, despite 2-in-3 very concerned about heat and heat waves

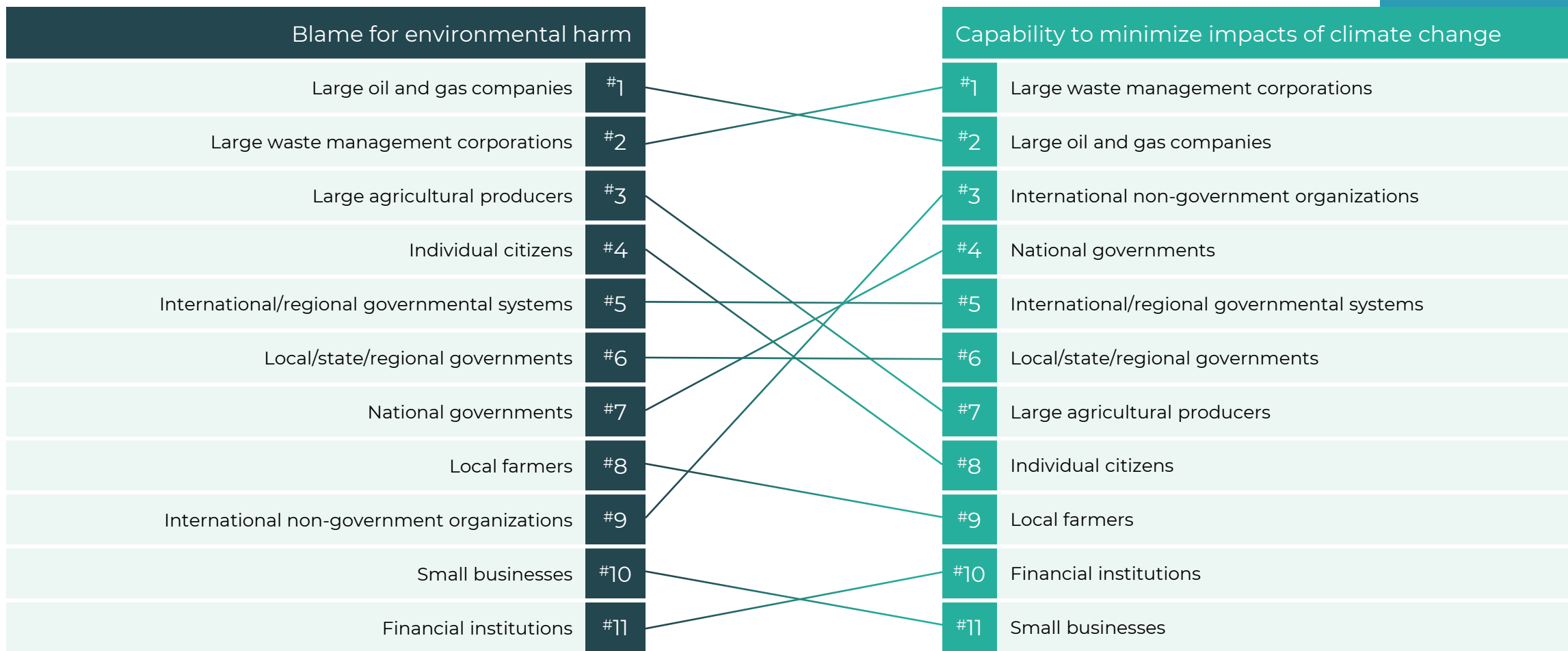


Local media is prioritized over international outlets in Argentina; most Argentinians (92%) are seeking climate change information from at least one source

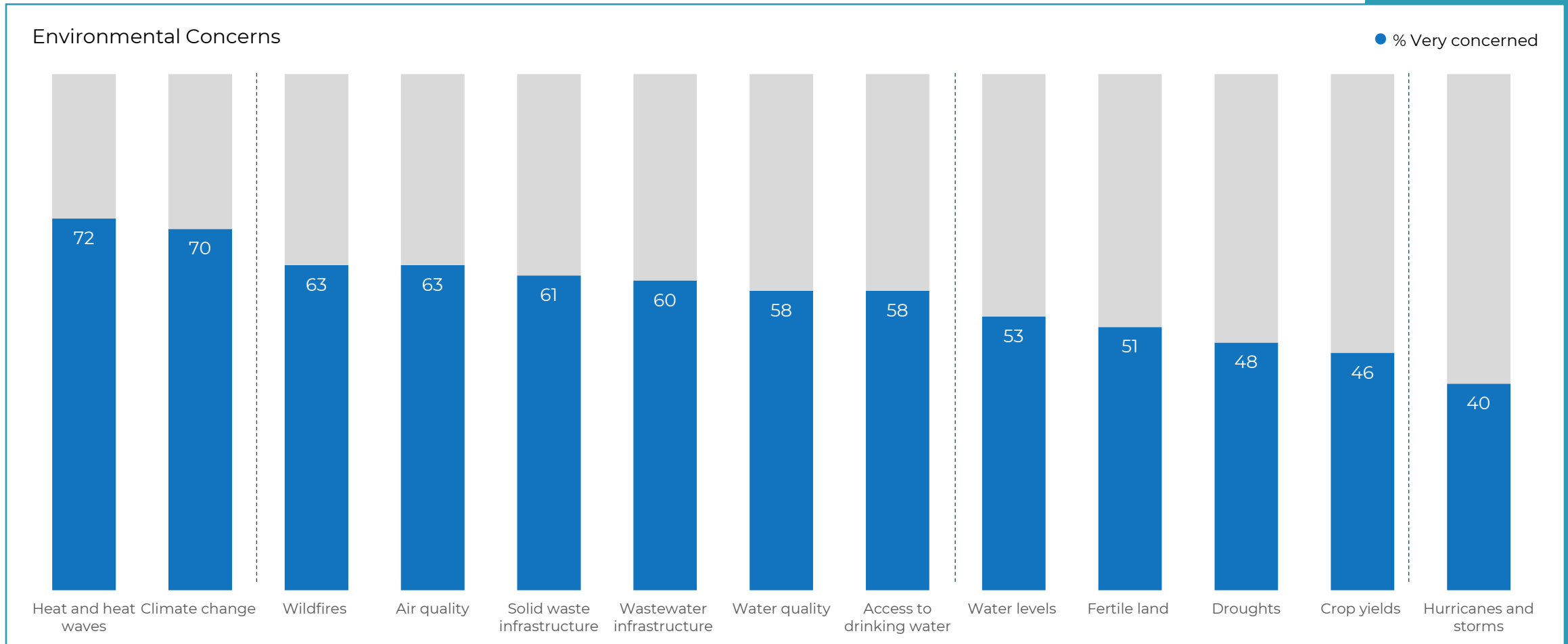
Climate Change Information Sources



Argentinesans believe large agricultural producers and individual citizens bear significant blame for environmental harm, yet perceive their capability in combating climate change as weaker than others

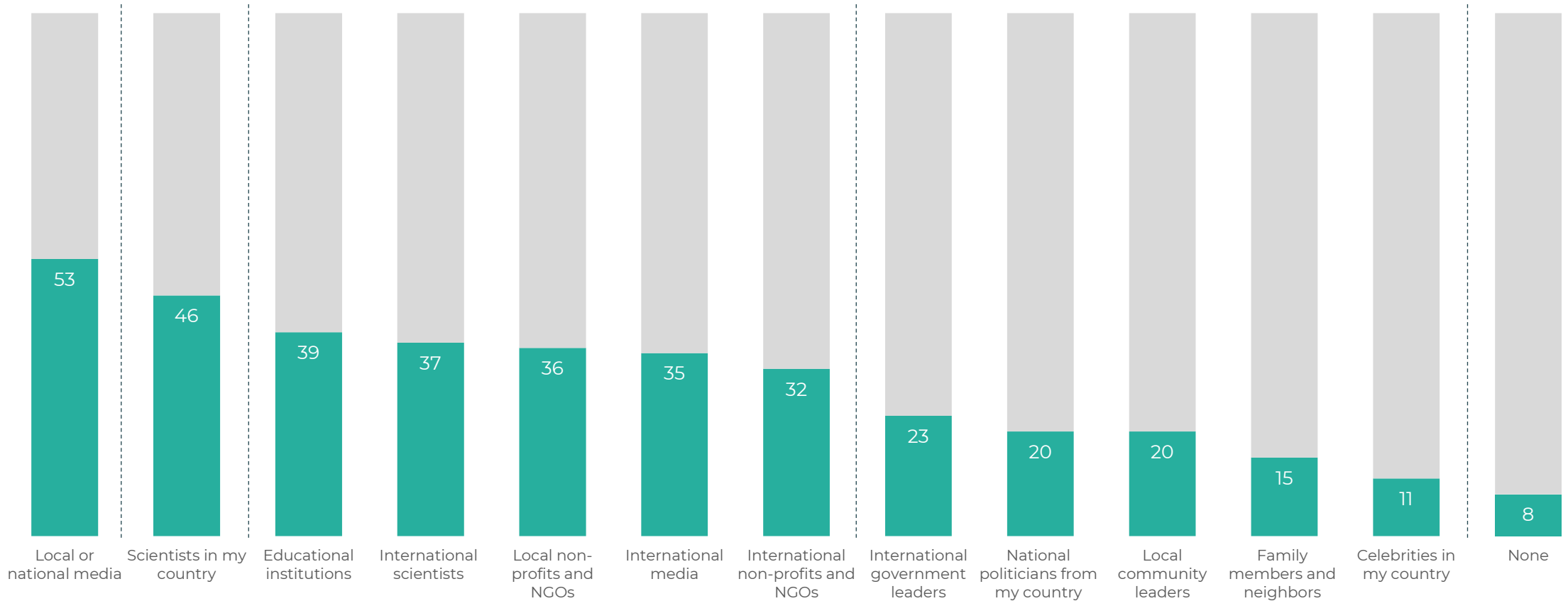


Heat waves are Brazilians' top environmental concern, and a strong majority (70%) are very concerned about climate change



Brazilians are much more likely (+18pts) to get climate information from local over international news sources

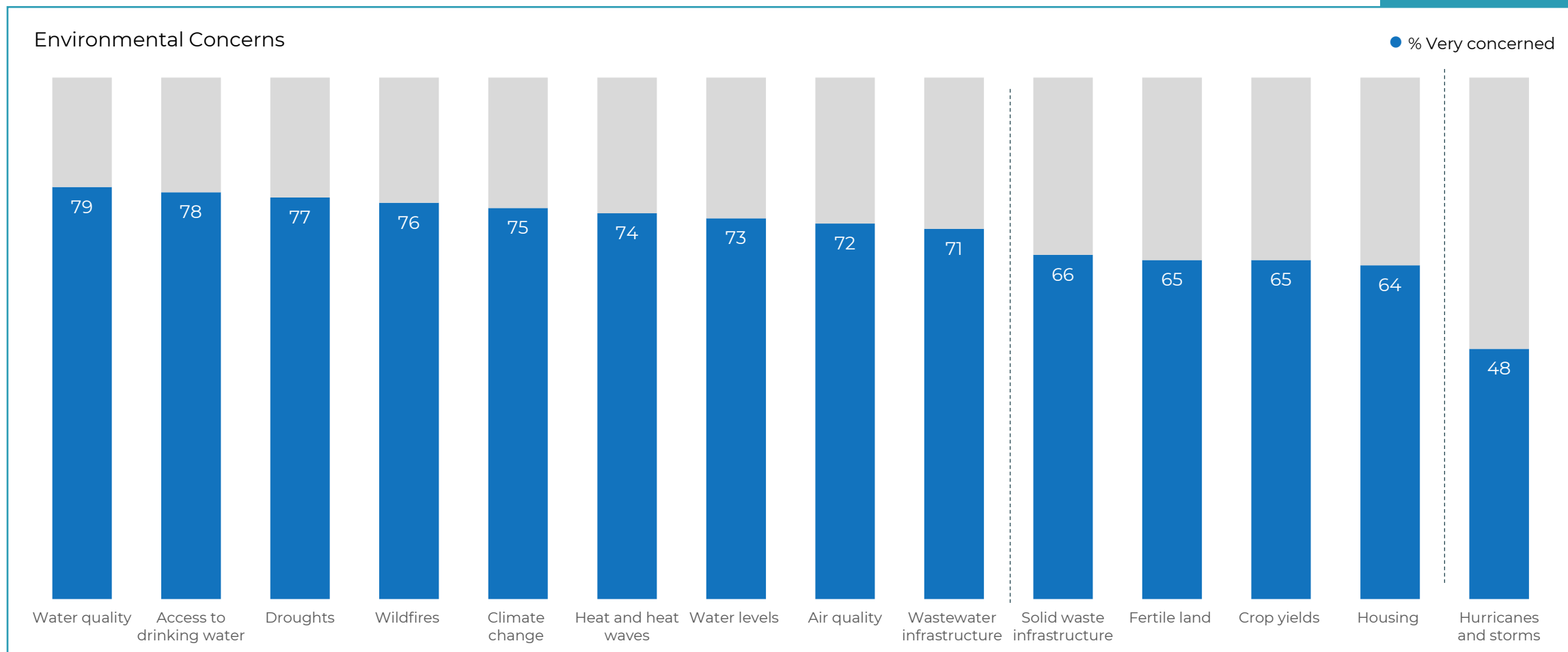
Climate Change Information Sources



Brazilians perceive private sector giants at both the most blameworthy for environmental harm and the most capable of meaningful action

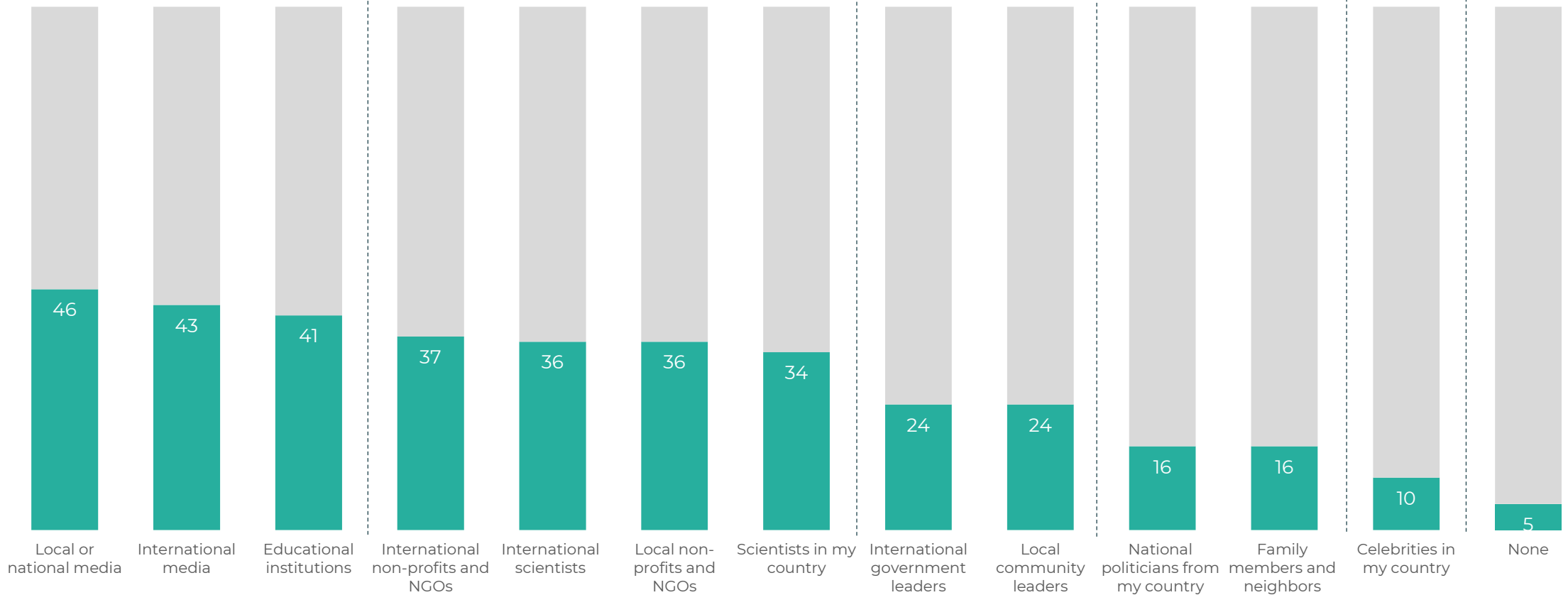
Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large waste management corporations
Large waste management corporations	#2	#2	Large agricultural producers
Large agricultural producers	#3	#3	Large oil and gas companies
National governments	#4	#4	National governments
Individual citizens	#5	#5	International/regional governmental systems
Local/state/regional governments	#6	#6	Local/state/regional governments
International/regional governmental systems	#7	#7	International non-government organizations
Local farmers	#8	#8	Individual citizens
International non-government organizations	#9	#9	Local farmers
Small businesses	#10	#10	Financial institutions
Financial institutions	#11	#11	Small businesses

Colombia is the country most concerned about nearly every environmental threat tested

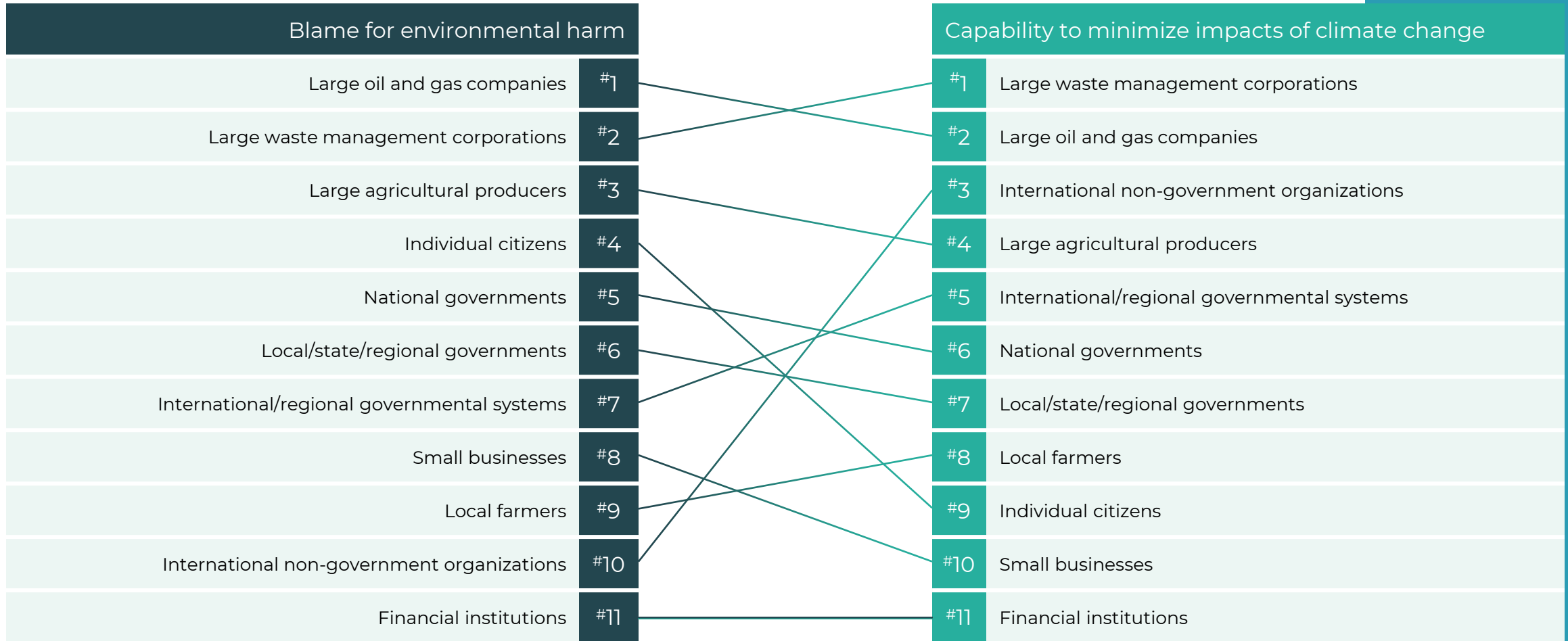


More than a third of Colombians seek climate information from international NGOs – there is a cohort willing to hear messaging directly from GMH

Climate Change Information Sources



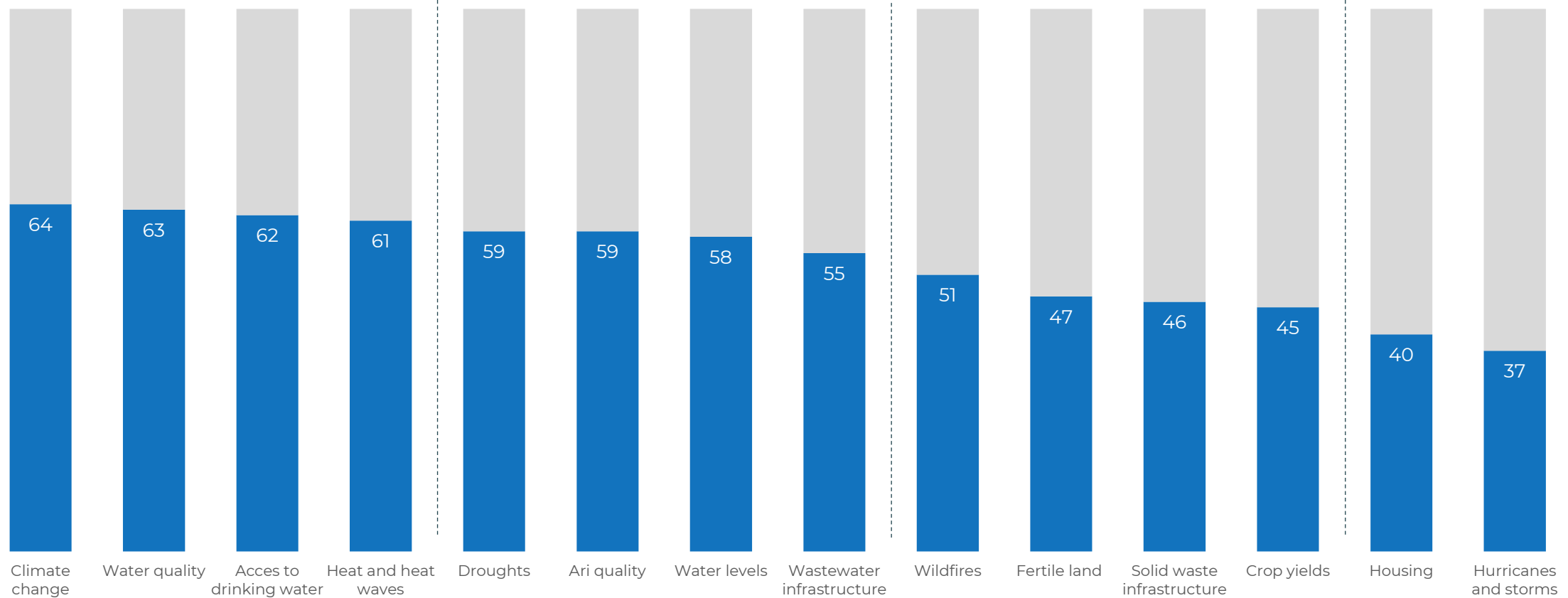
Likewise, international NGOs are seen as extremely capable in Colombia, especially compared to their share of perceived blame for environmental harm



And despite relatively lower support for climate and methane action compared to Latin American peers, Mexicans are concerned about climate risks

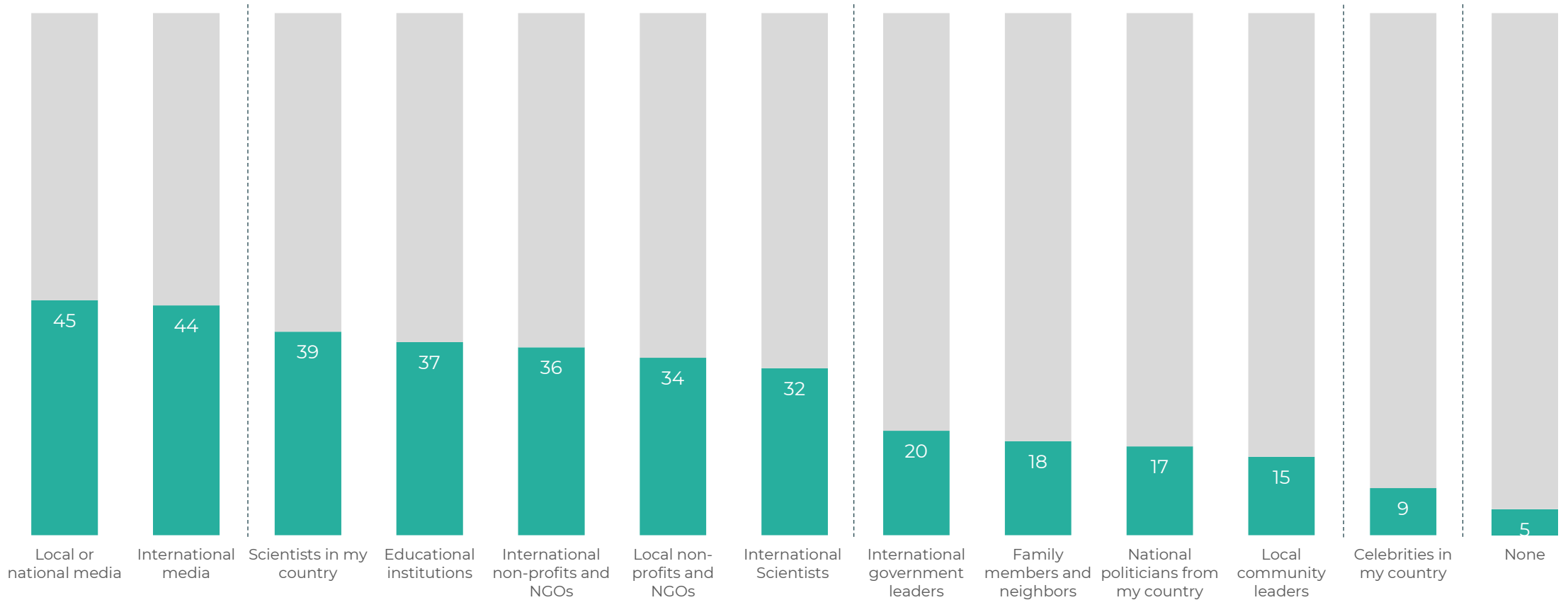
Environmental Concerns

● % Very concerned

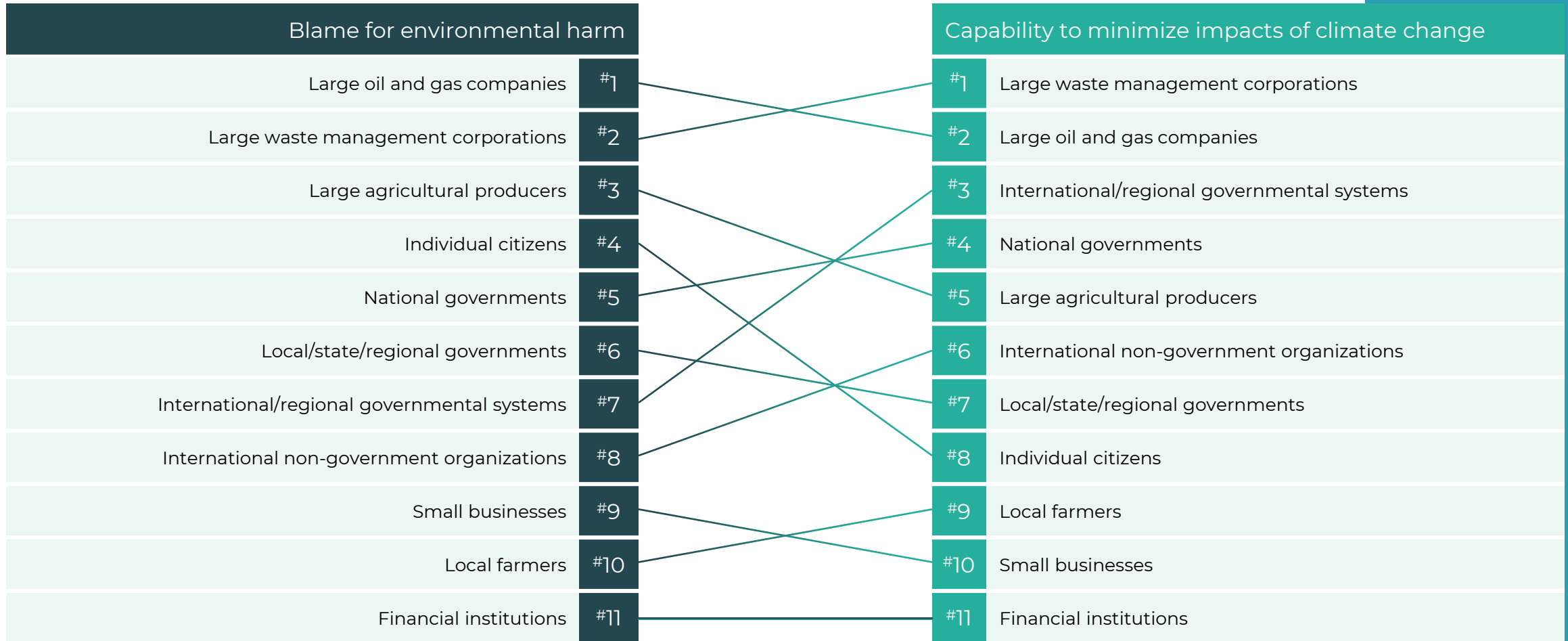


With nearly equal levels of use for local and international media, Mexicans may be more responsive to big-outlet press hits than Latin American peers

Climate Change Information Sources



Mexicans see international government (UN, CELAC) as more capable of combatting climate change than their national government

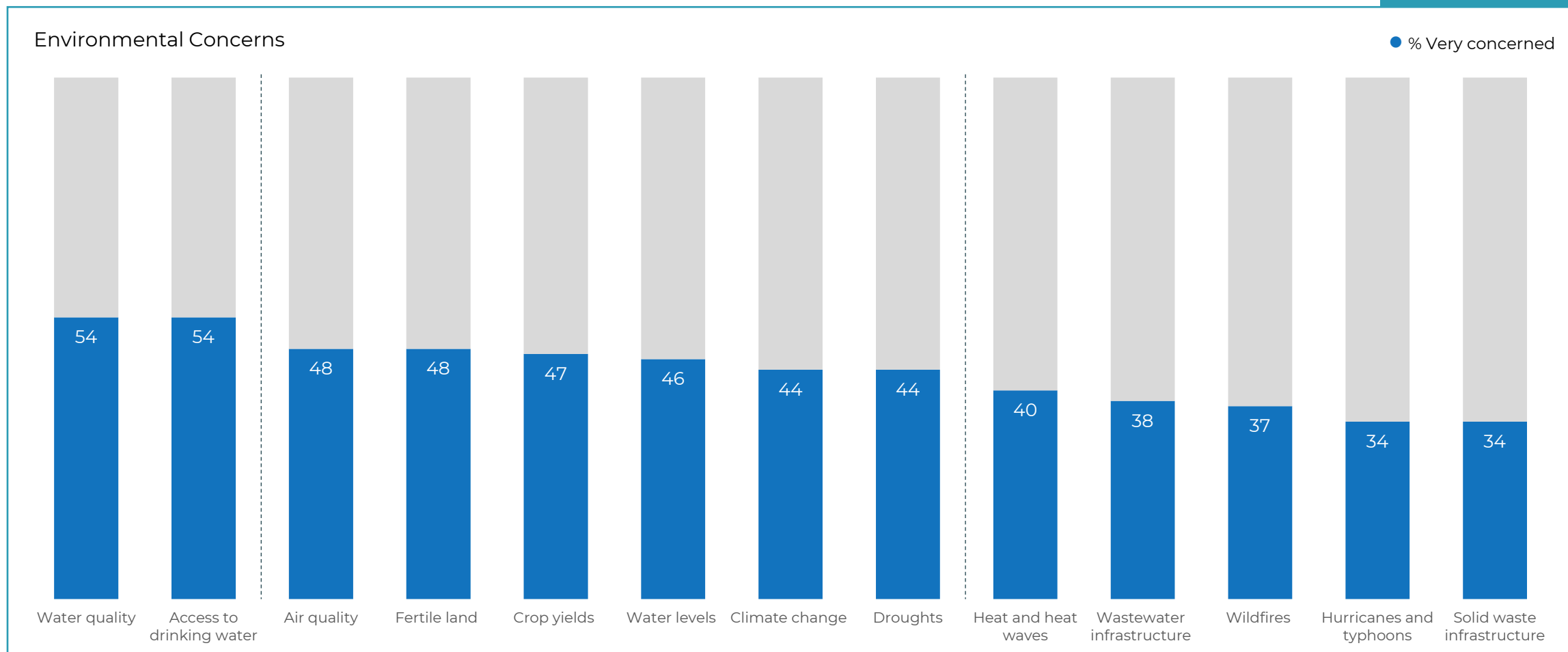




CONCERNS, MESSENGERS, AND INSTITUTIONS

Africa & Middle East Region

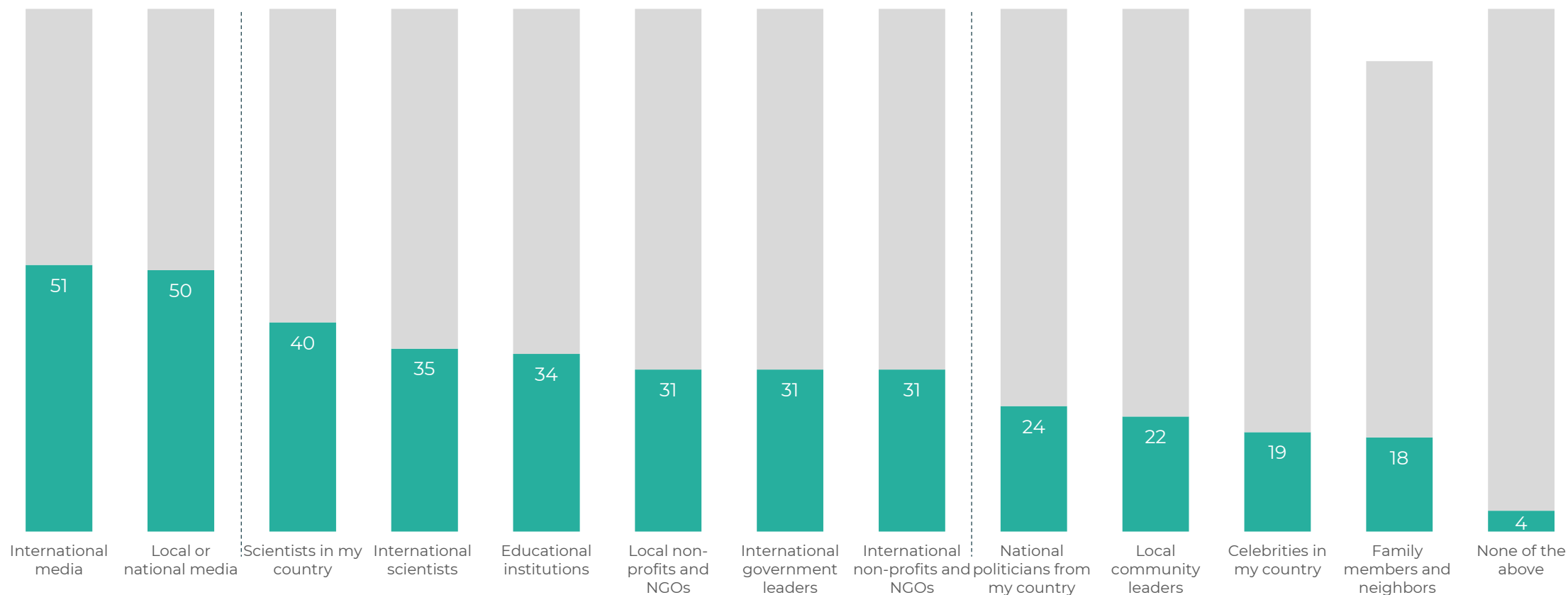
Egyptians, living in a largely desert country, are most concerned about water and air quality, followed by agricultural worries about land and yields



The international and national media are equally trusted in Egypt; scientists and educational institutions round out the top-5 most-trusted

Climate Change Information Sources

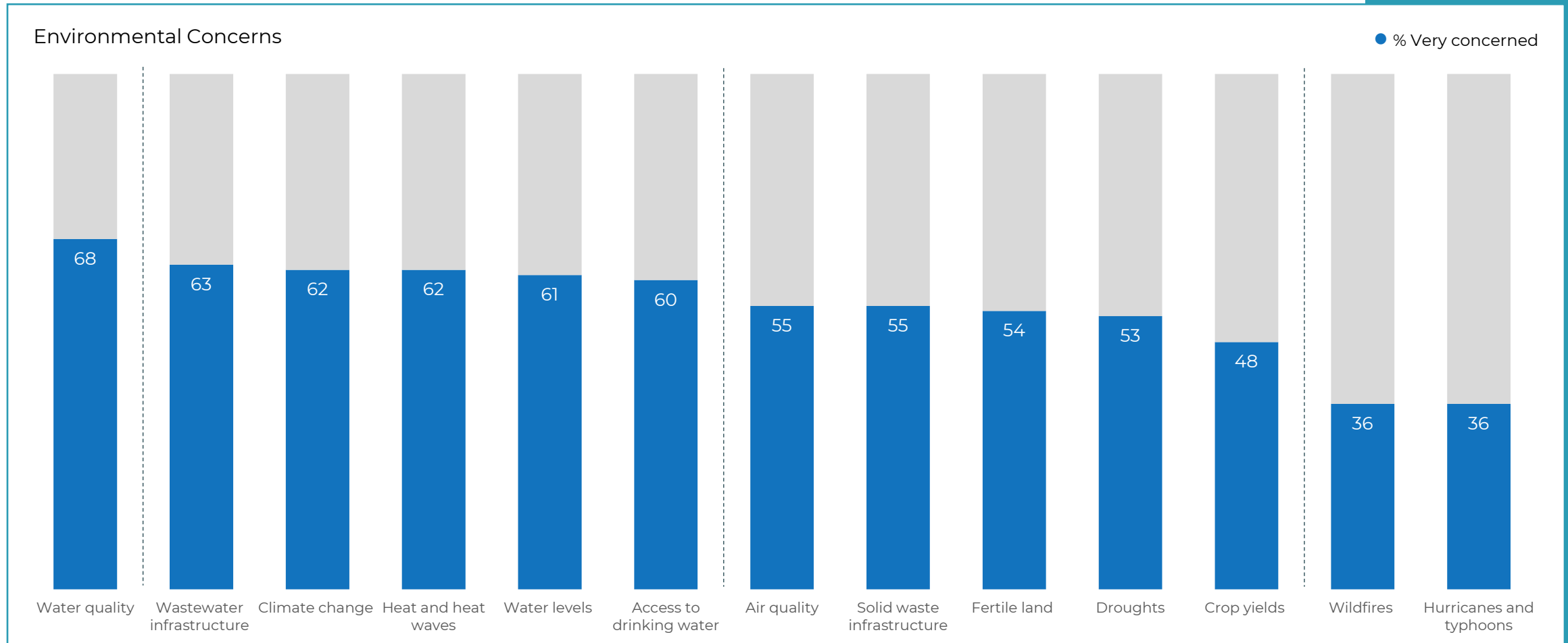
● % Get climate information from each source



Egyptians blame oil & gas companies and waste corporations most while local and international governments are more to blame than national;
Egyptians think those to blame are also capable of mitigation

Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Local/state/regional governments	#3	#3	International/regional governmental systems
International/regional governmental systems	#4	#4	Local/state/regional governments
Large agricultural producers	#5	#5	National governments
Individual citizens	#6	#6	International non-government organizations
National governments	#7	#7	Large agricultural producers
Local farmers	#8	#8	Financial institutions
International non-government organizations	#9	#9	Individual citizens
Small businesses	#10	#10	Local farmers
Financial institutions	#11	#11	Small businesses

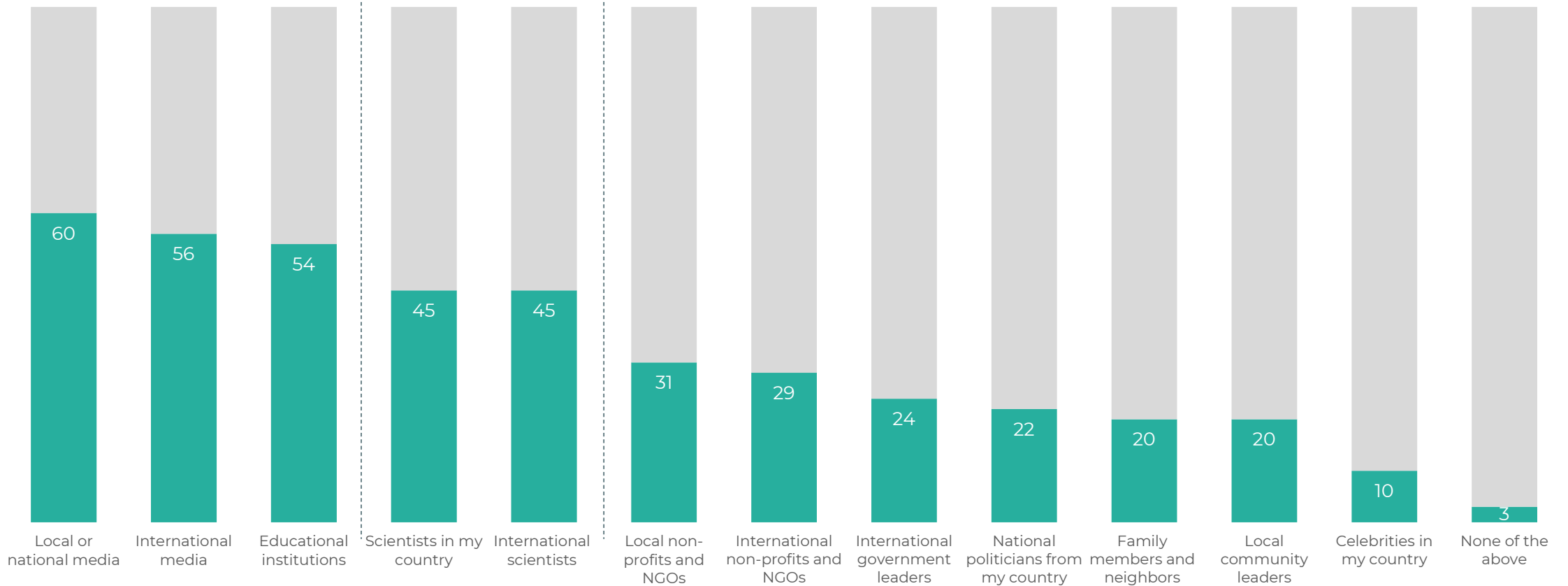
There is a high level of concern about environmental issues in South Africa, led by worries about water; climate change and heat waves are also major concerns



In South Africa, the local media is most trusted; there is also substantial trust in international media and educational institutions

Climate Change Information Sources

● % Get climate information from each source



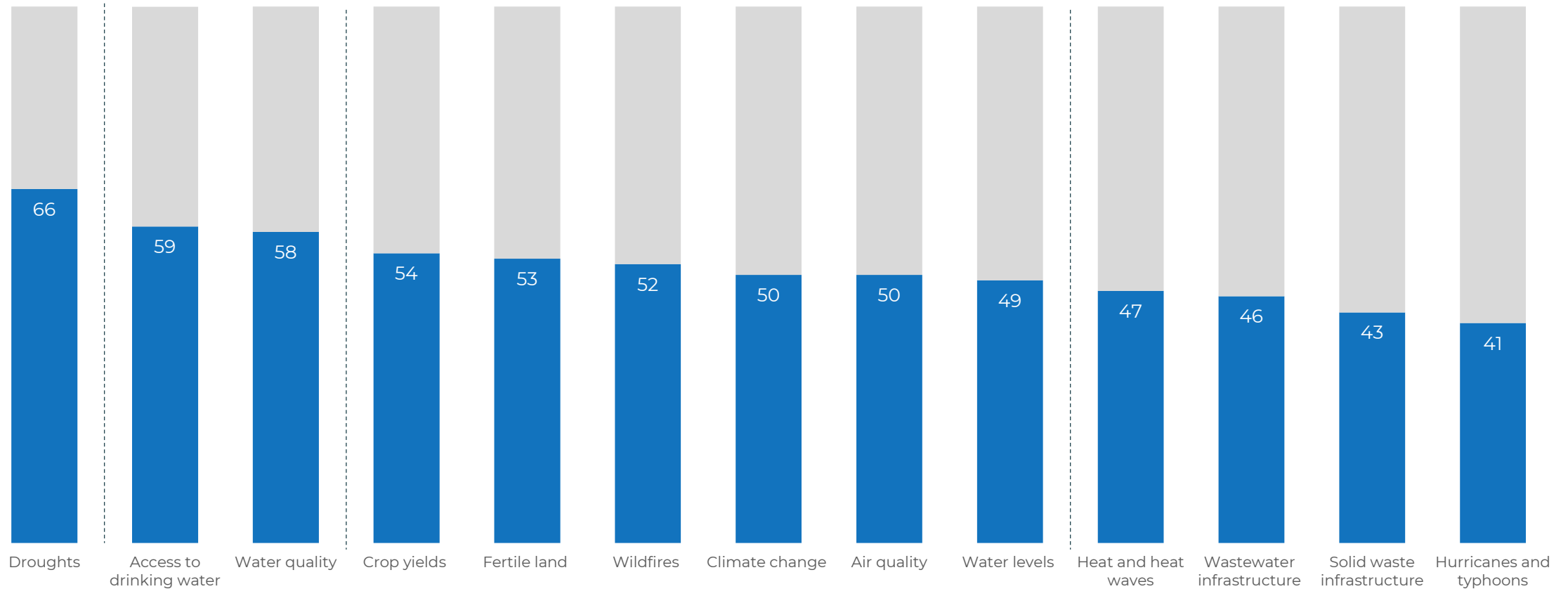
South Africans primarily blame energy and waste management corporations but also put significant blame on individuals; at the same time, they say individuals are not very capable of minimizing impacts

Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Individual citizens	#3	#3	National governments
Large agricultural producers	#4	#4	International/regional governmental systems
National governments	#5	#5	Large agricultural producers
Local/state/regional governments	#6	#6	International non-government organizations
International/regional governmental systems	#7	#7	Local/state/regional governments
Local farmers	#8	#8	Individual citizens
International non-government organizations	#9	#9	Local farmers
Small businesses	#10	#10	Financial institutions
Financial institutions	#11	#11	Small businesses

Half of Moroccans are very concerned about climate change; they are even more concerned about droughts and water availability/quality

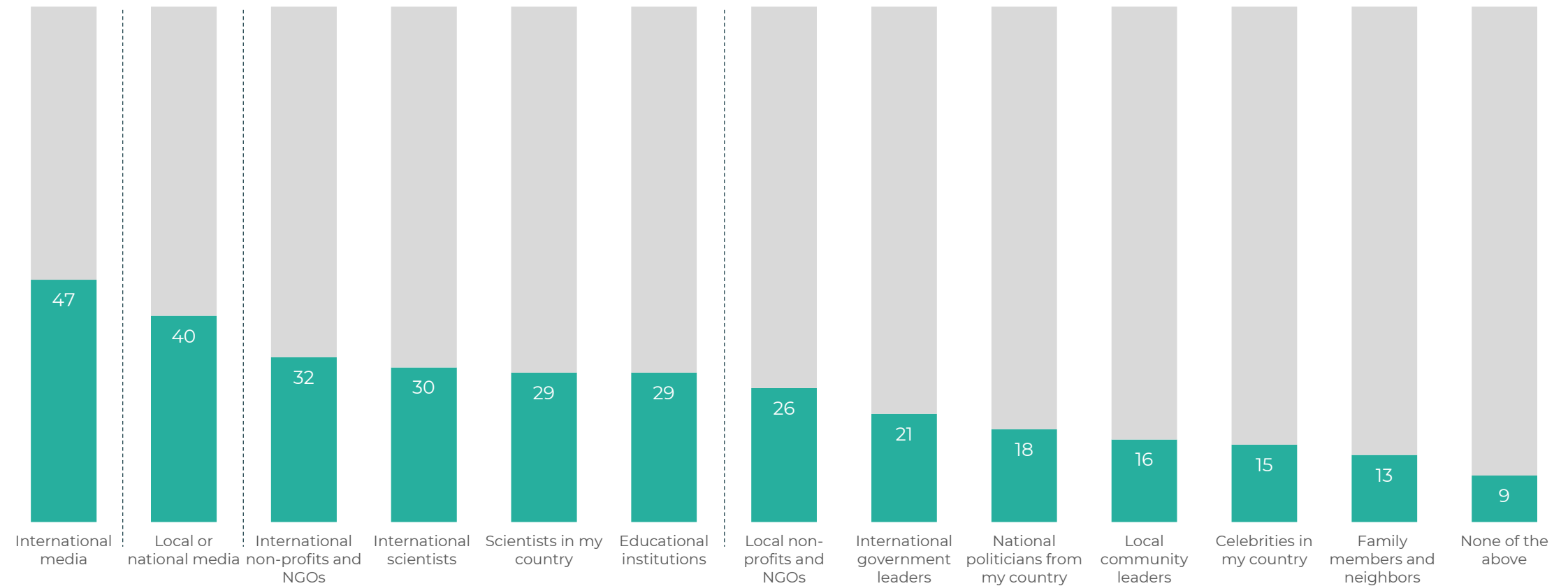
Environmental Concerns

● % Very concerned

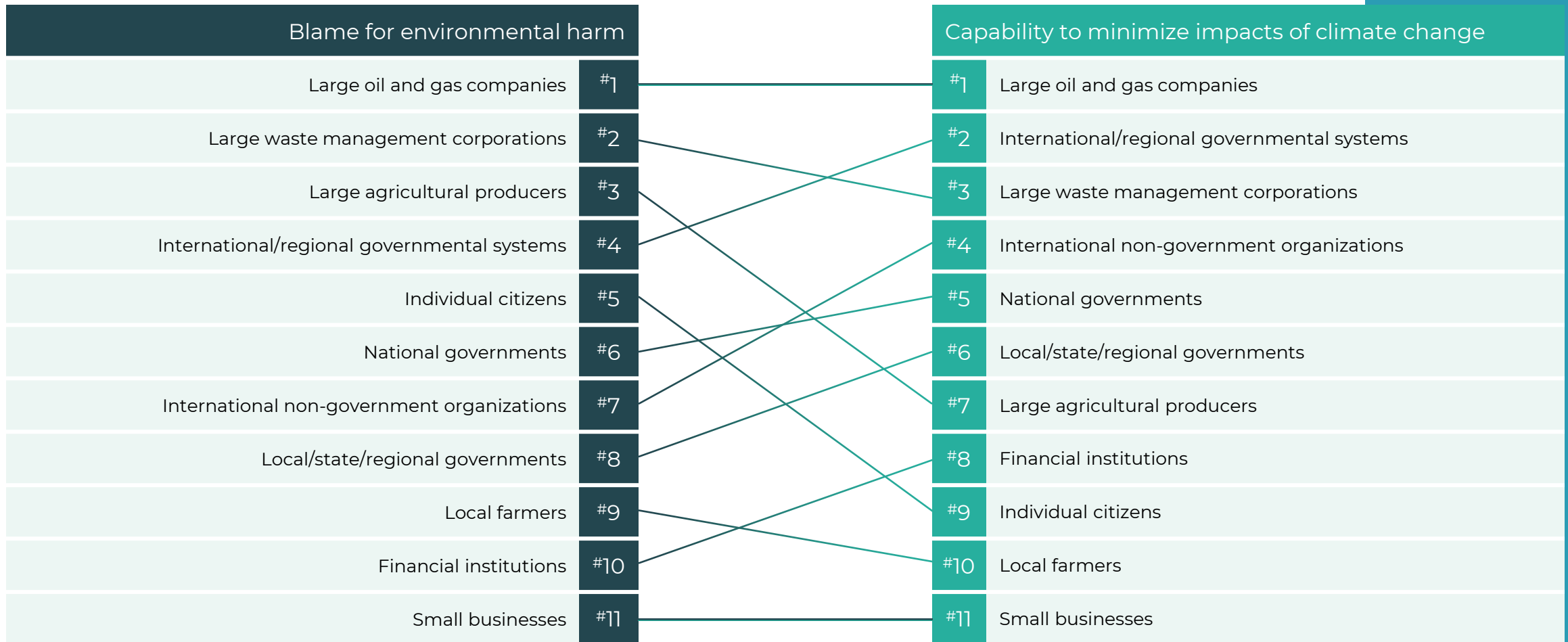


Moroccans trust international sources more than local ones: international media over local media, international scientists over local ones, and international NGOs over local NGOs

Climate Change Information Sources



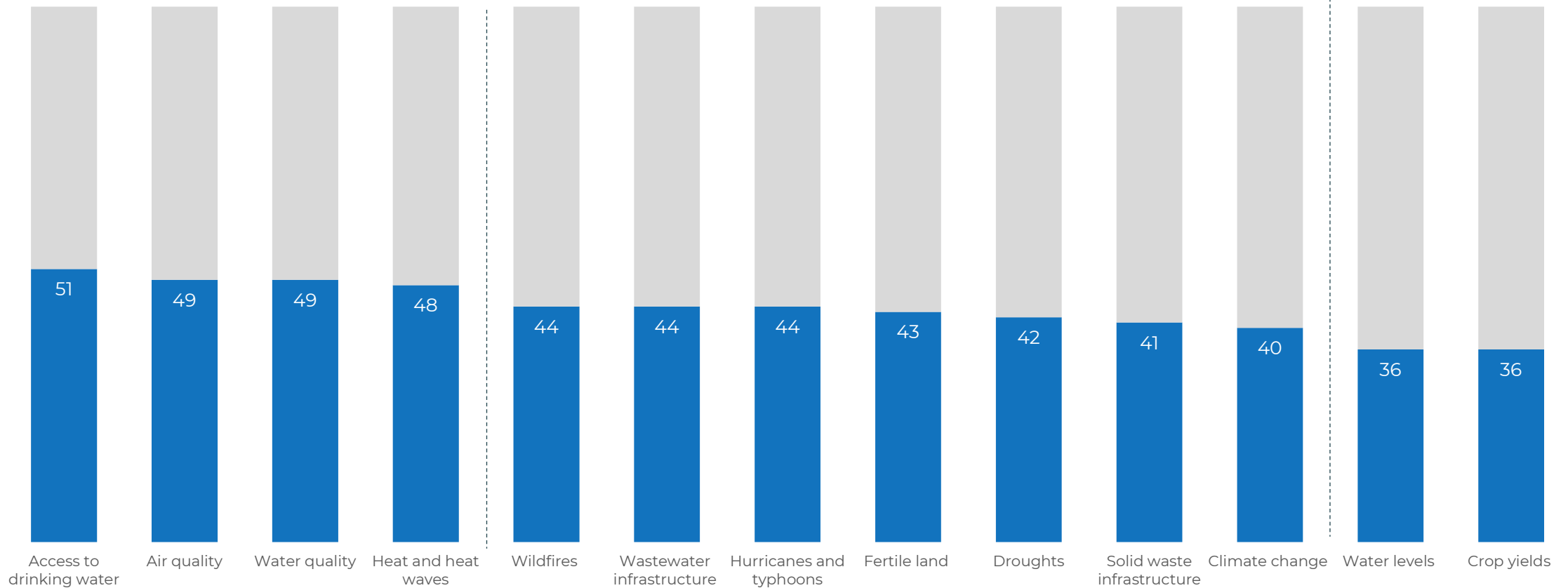
Moroccans primarily blame energy, waste management and agricultural corporations for environmental harm; international governments and NGOs have a role to play in minimizing climate change



Omanis are more concerned with access to clean water and air than climate change, which falls towards the bottom of their environmental concerns

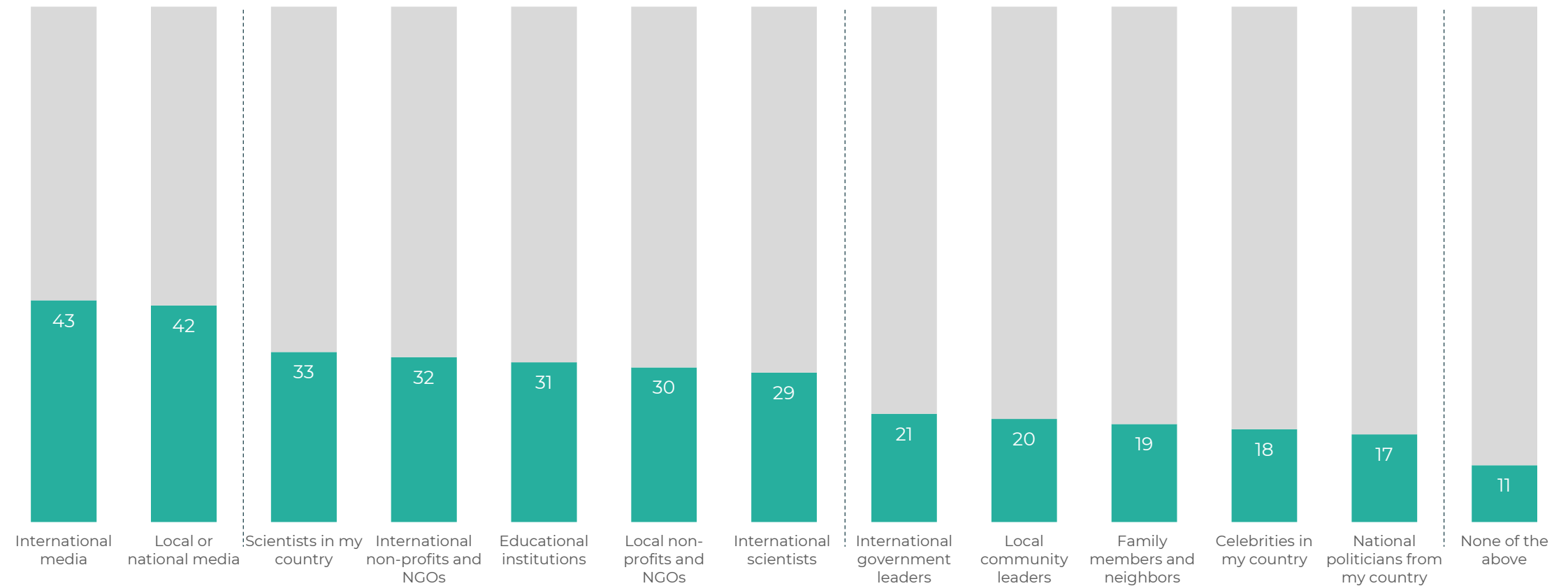
Environmental Concerns

● % Very concerned



Omanis mainly trust the international and local media for climate information

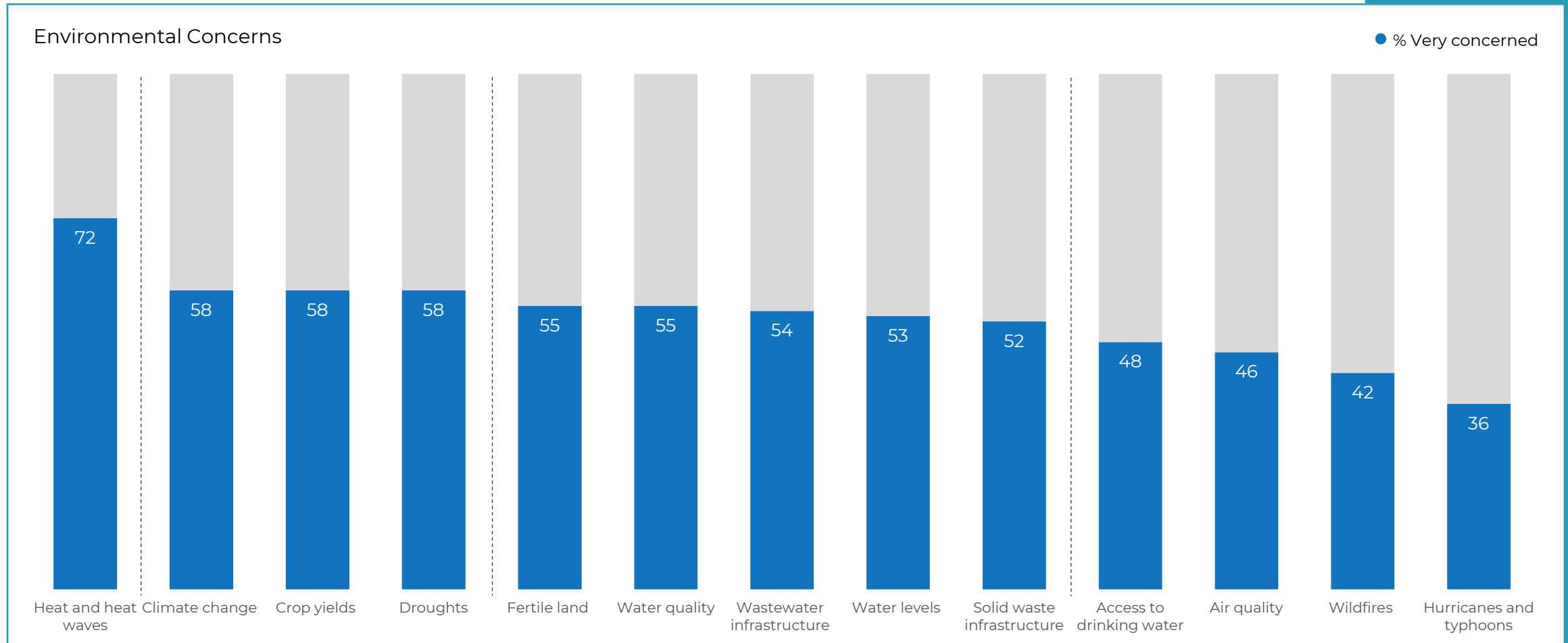
Climate Change Information Sources



Like elsewhere, Omanis blame polluting corporations for environmental harm; they see a particularly large role for national governments in minimizing climate change

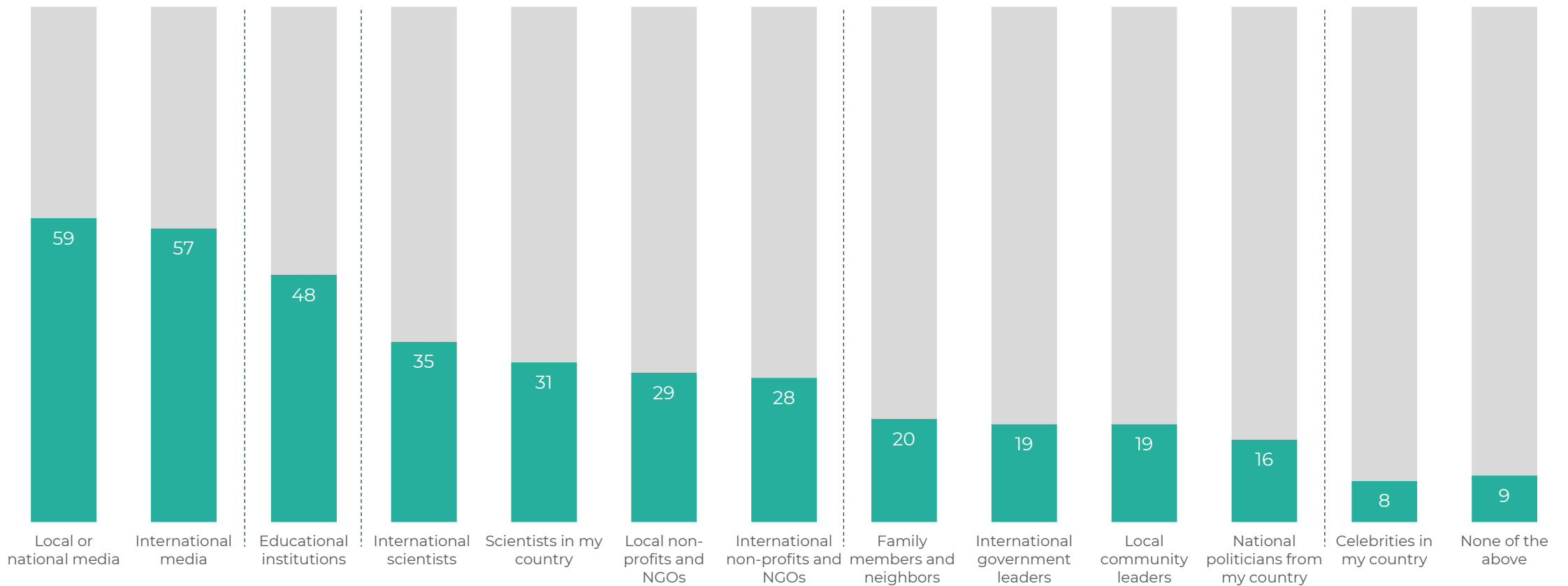


A majority of Botswanans are very concerned about climate change – heat and heat waves are of particular concern

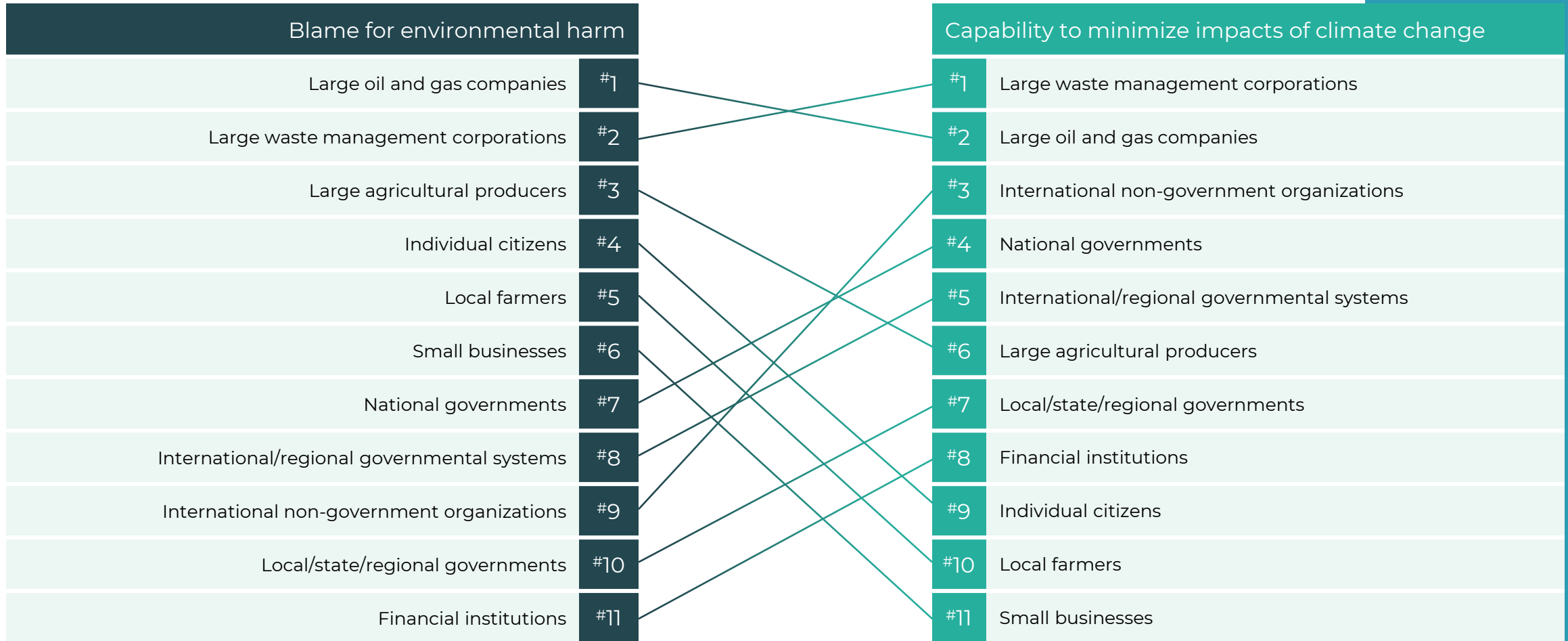


Most Botswanans rely on local and international media for climate change info, but nearly half also look to educational institutions

Climate Change Information Sources



Apart from oil and gas and waste management corporations, Botswanans believe those most responsible for environmental harm are relatively less capable of minimizing the impacts of climate change

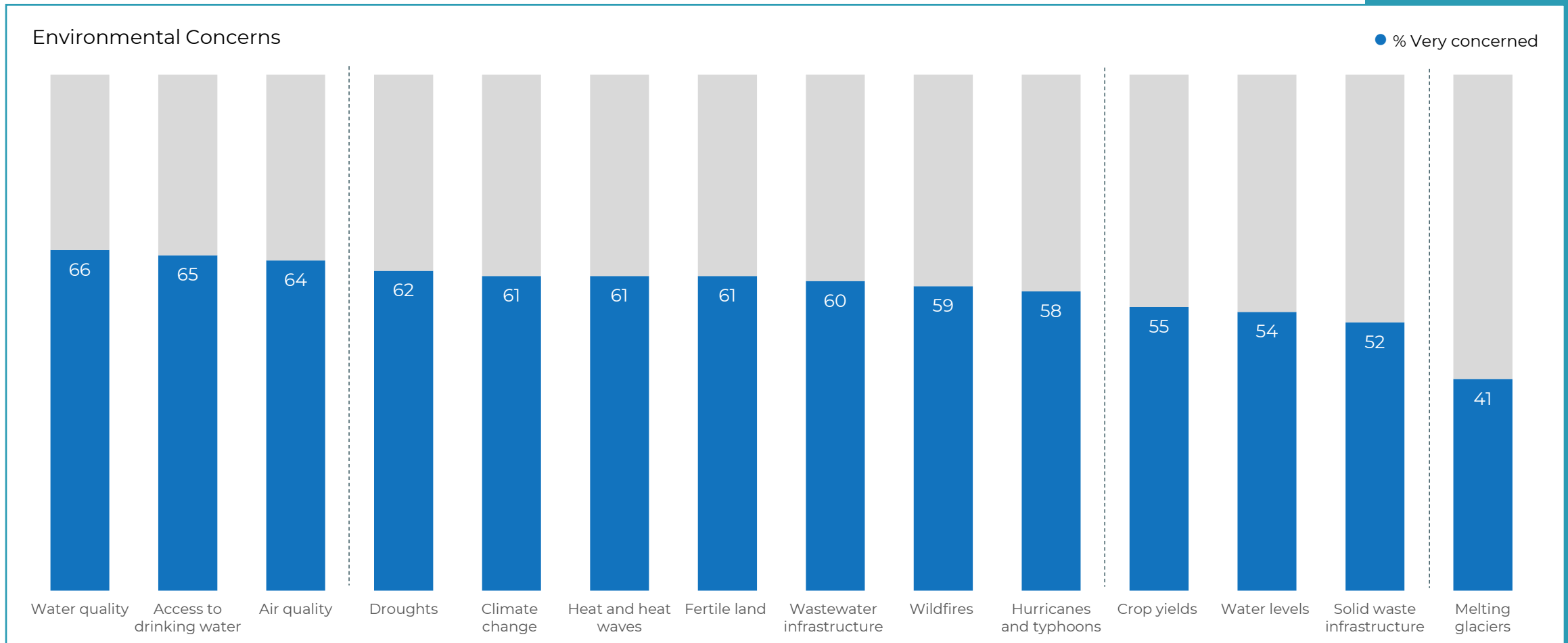




CONCERNS, MESSENGERS, AND INSTITUTIONS

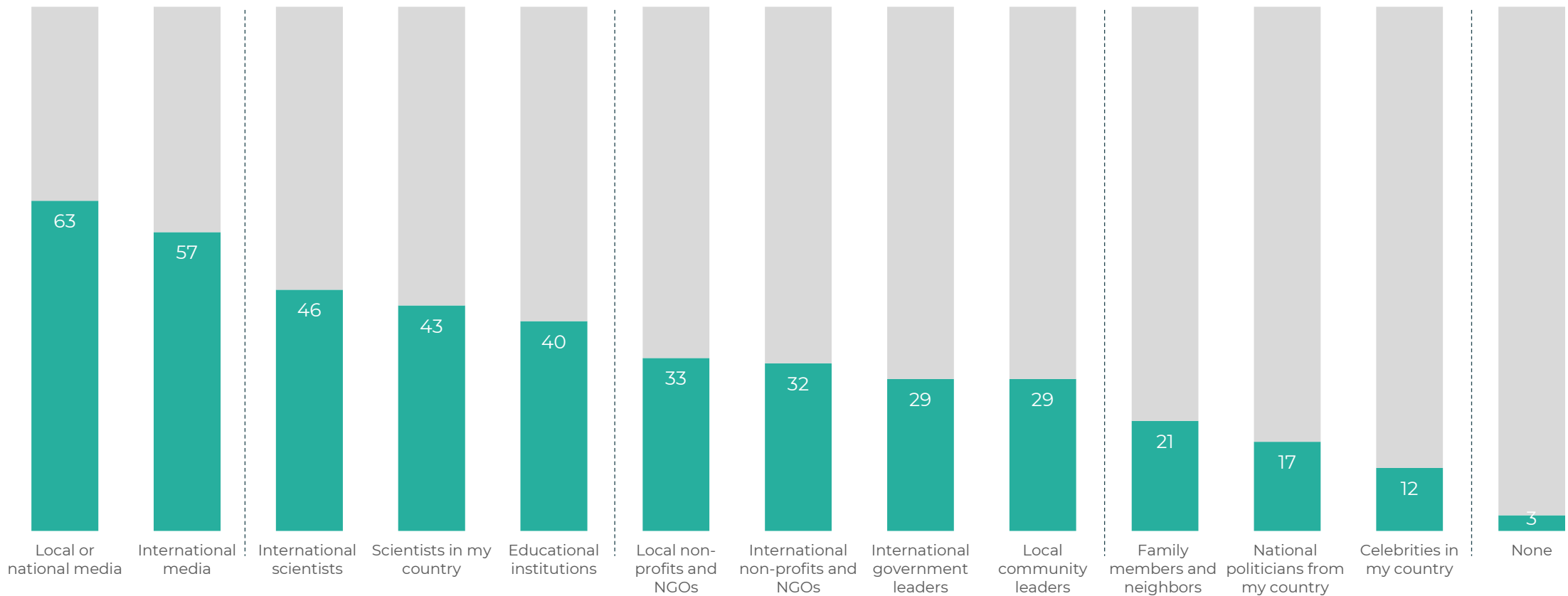
Asia Region

In Indonesia, access to clean air and water dominate concerns, while melting glaciers (which have nearly vanished across the nation) attract less attention

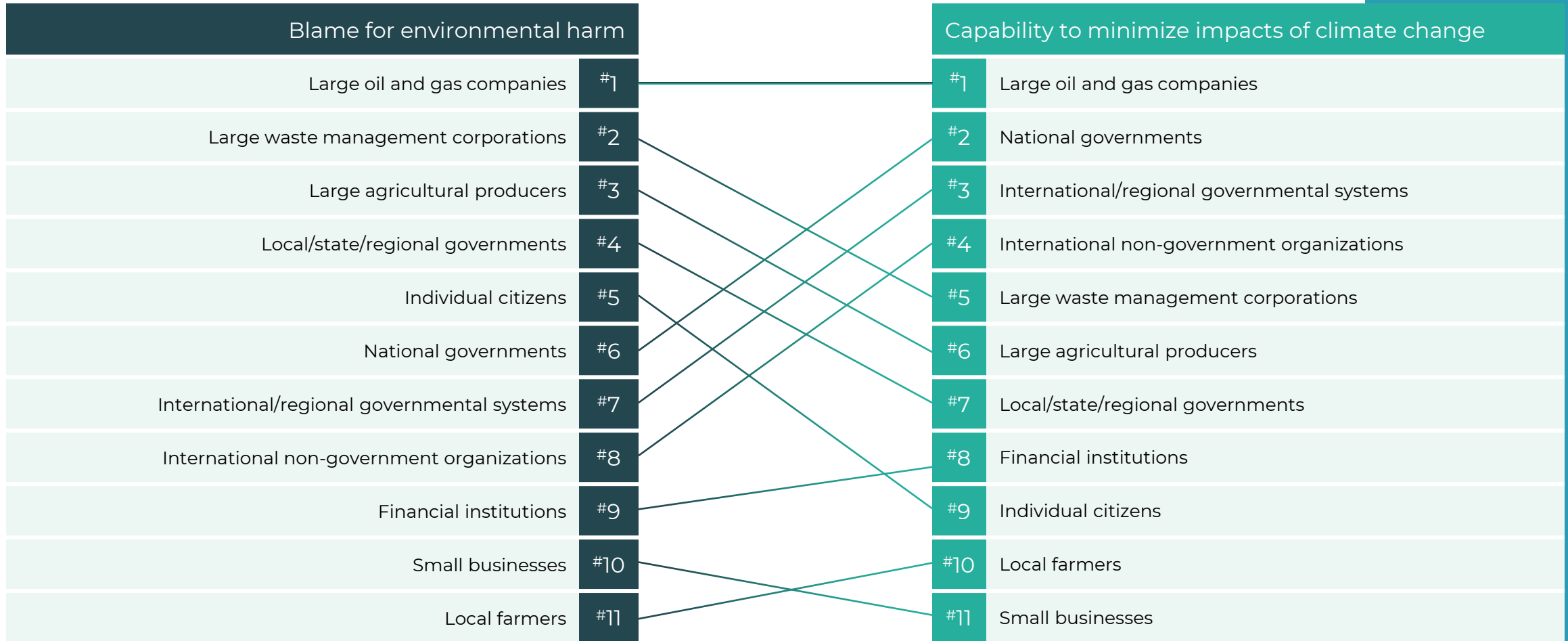


Local and international media are prioritized in Indonesia; scientists and educational institutions are also relatively highly trusted

Climate Change Information Sources



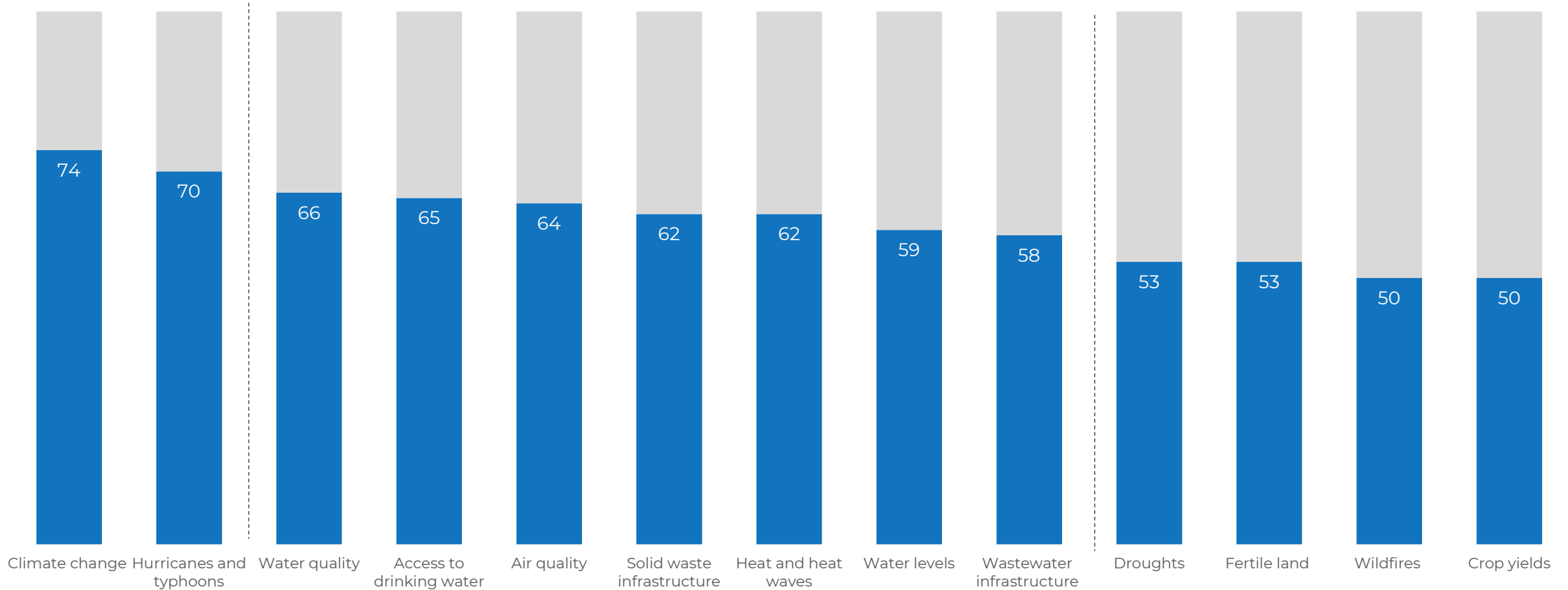
While Indonesians see waste and corporations as particularly blameworthy for environmental harm, they view government actors as better positioned to minimize climate impacts than these industries



Globally, the Philippines is second only to Colombia (75%) in intense concern for climate change

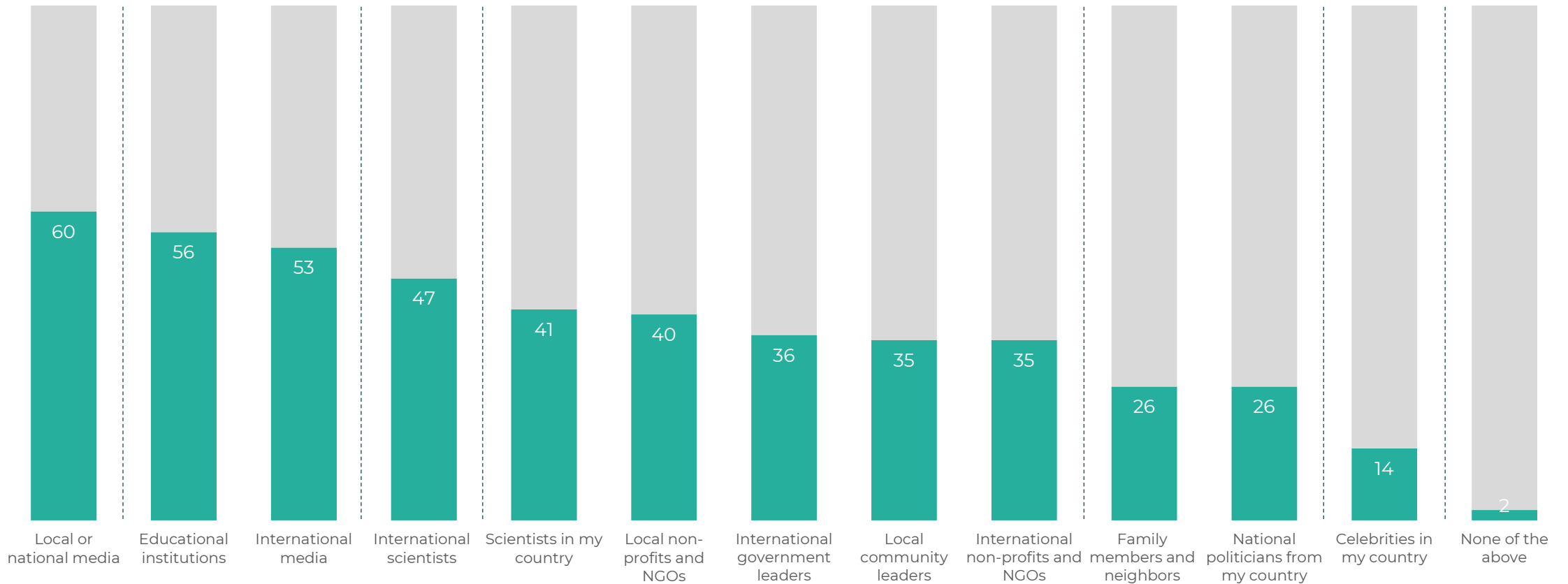
Environmental Concerns

● % Very concerned

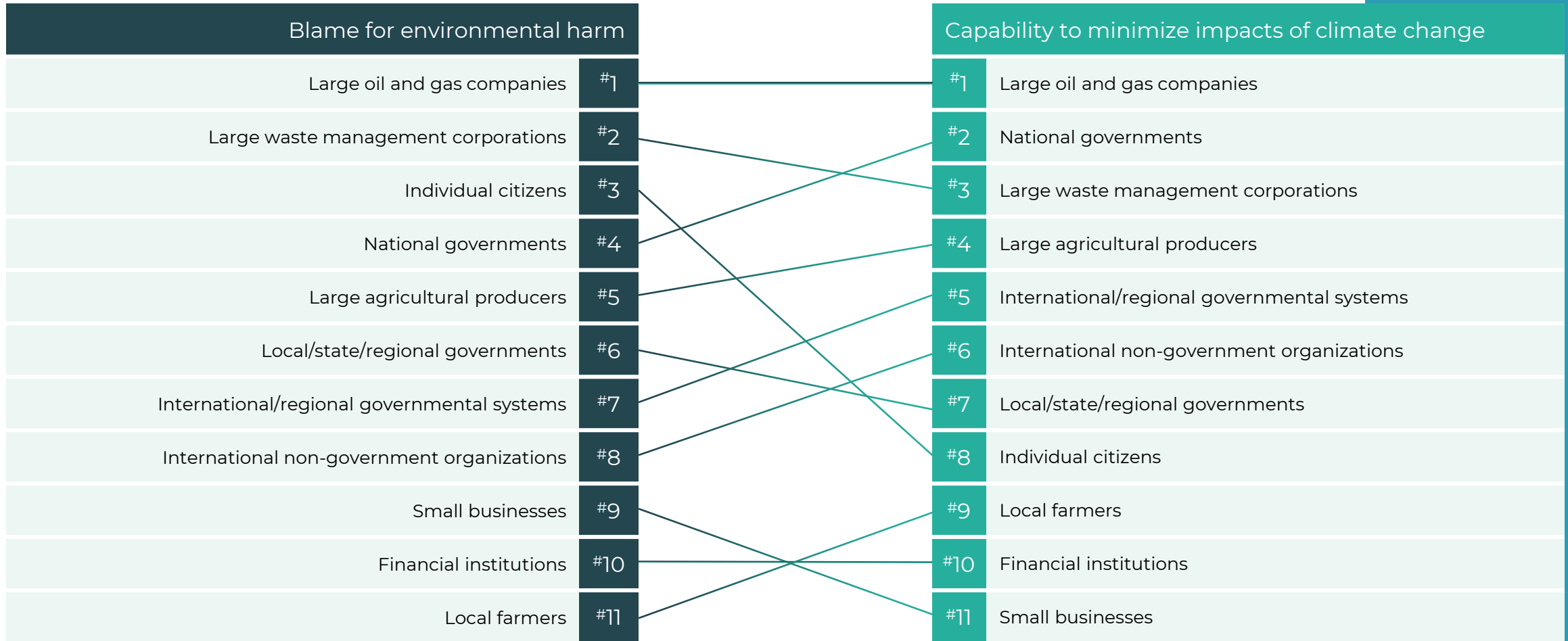


Filipinos are receiving their climate information from their local media and educational institutions; They ranked the highest in sourcing climate change information from schools

Climate Change Information Sources

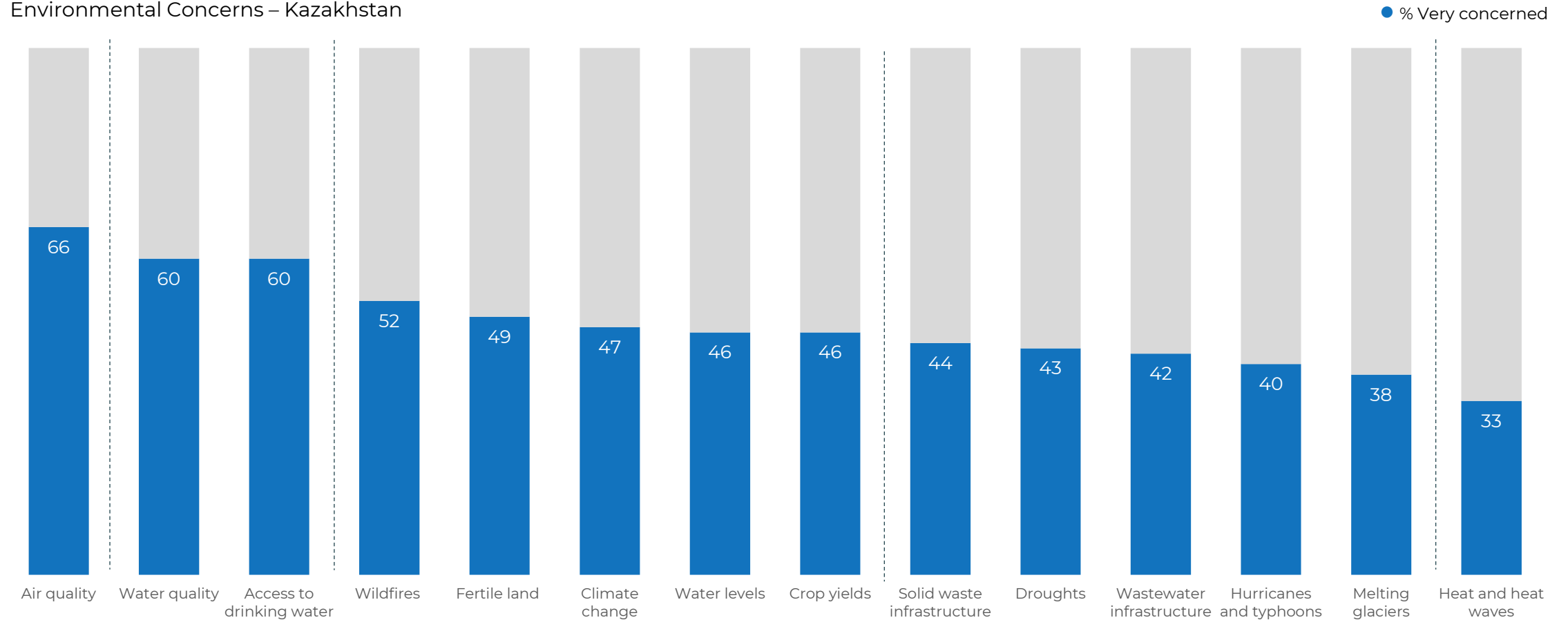


While Filipinos assign much blame for environmental harm to individual citizens, they don't perceive them as capable of making a difference



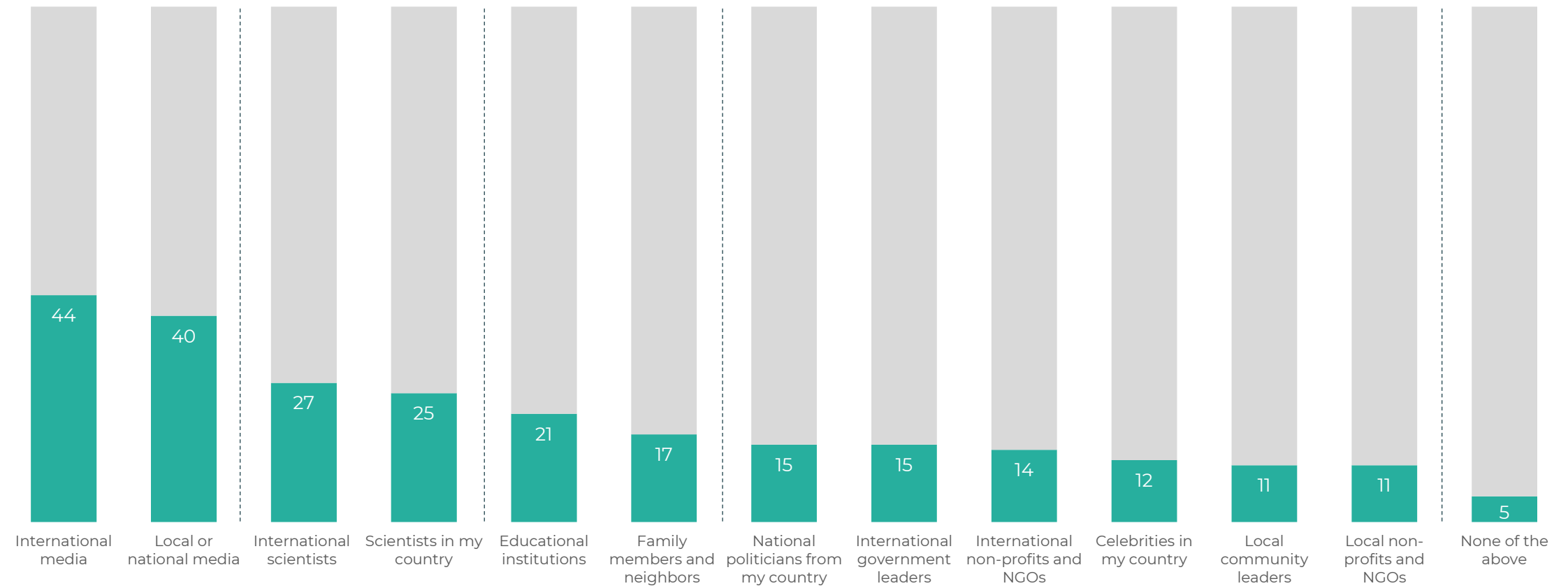
Heavy industry in Kazakhstani cities (including Nur-Sultan, Almaty, and Karaganda) contributes to regular Air Quality Index ratings dangerous to human health

Environmental Concerns – Kazakhstan



In Kazakhstan, 2 in 5 receive their climate change information from international and local media sources

Climate Change Information Sources

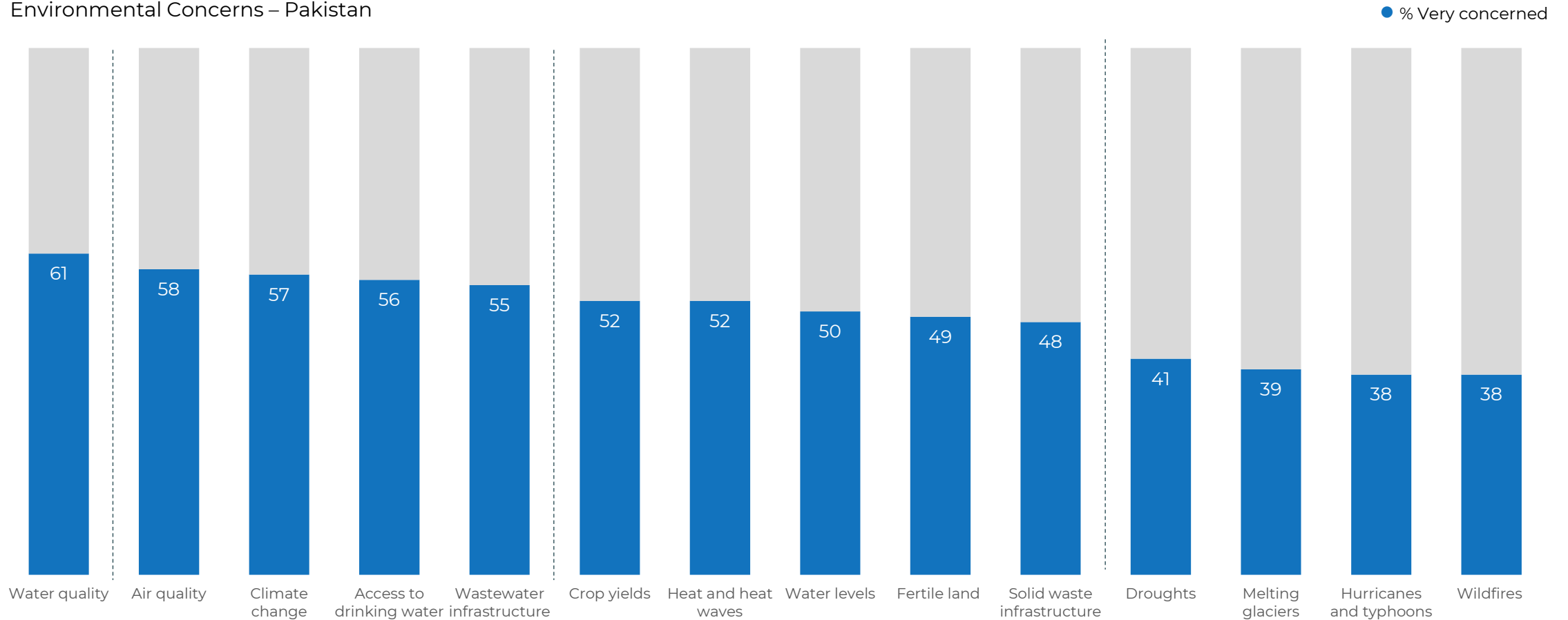


Kazakhstanis view large energy and waste companies as both the most blameworthy for environmental harm and the most capable of making positive changes

Blame for environmental harm		Capability to minimize impacts of climate change	
Large oil and gas companies	#1	#1	Large oil and gas companies
Large waste management corporations	#2	#2	Large waste management corporations
Large agricultural producers	#3	#3	National governments
International/regional governmental systems	#4	#4	International/regional governmental systems
Local/state/regional governments	#5	#5	Local/state/regional governments
Local farmers	#6	#6	International non-government organizations
National governments	#7	#7	Large agricultural producers
International non-government organizations	#8	#8	Financial institutions
Individual citizens	#9	#9	Local farmers
Small businesses	#10	#10	Individual citizens
Financial institutions	#11	#11	Small businesses

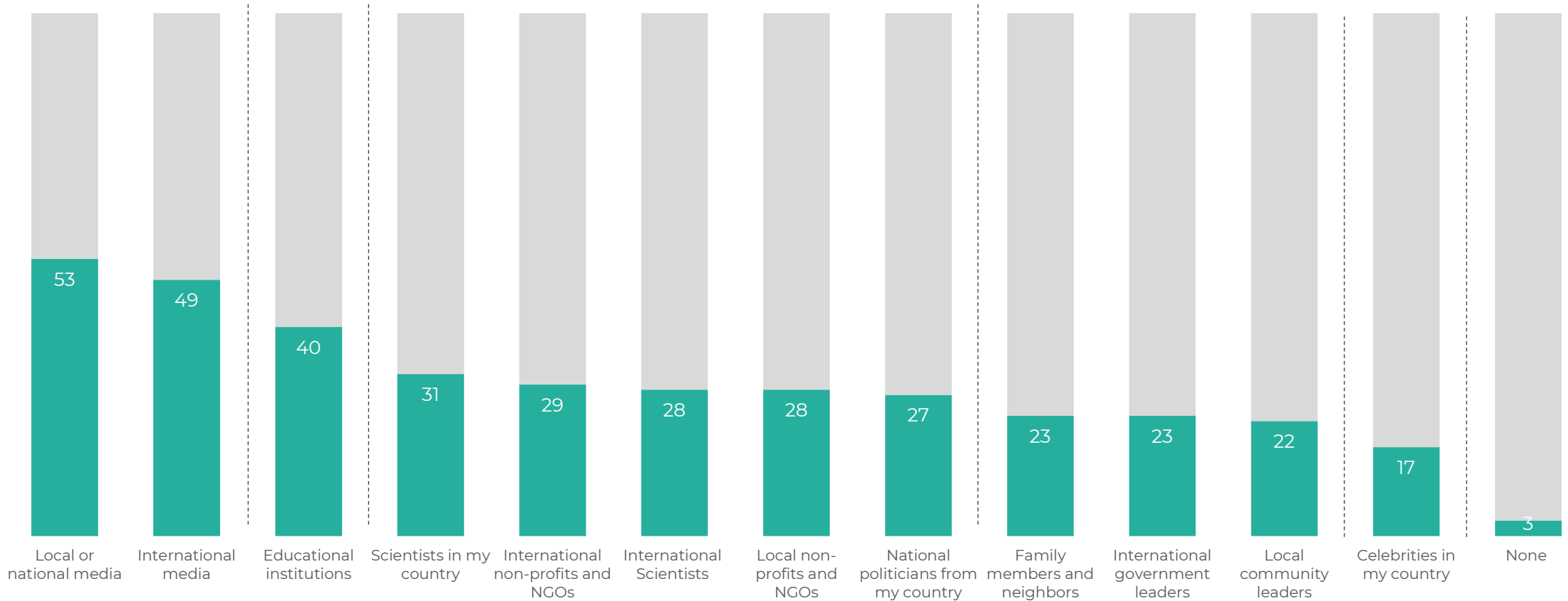
Pakistanis are 7pts more concerned with wastewater infrastructure than solid waste infrastructure

Environmental Concerns – Pakistan

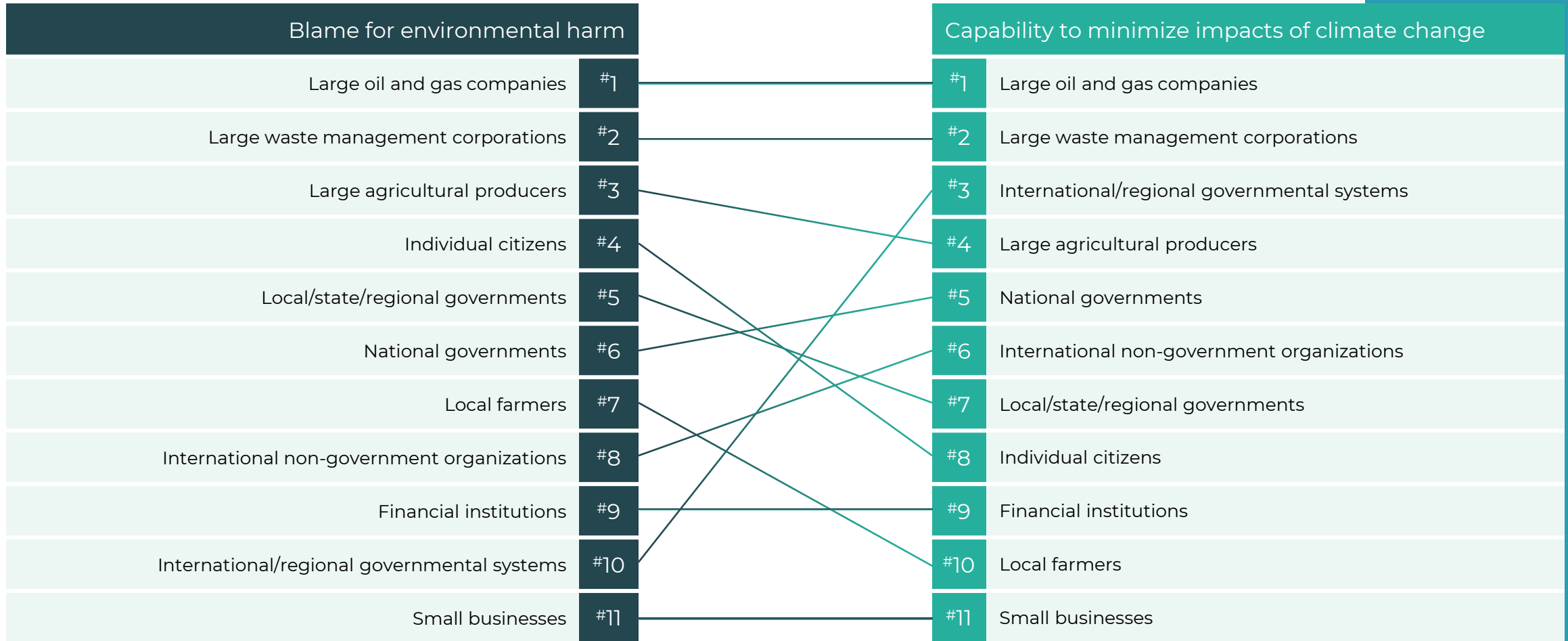


While local and national media are used by a majority, about one-third of Pakistanis receive their climate change information from their local scientists

Climate Change Information Sources



Pakistanis place more faith in international government systems than their own national or local governments to minimize the impacts of climate change





Social Media Usage

By Country

Social Media Usage Across Countries

	G7				LatAm				Africa + ME					Asia			
	USA	UK	France	Germany	Argentina	Brazil	Colombia	Mexico	Egypt	South Africa	Morocco	Oman	Botswana	Indonesia	Philippines	Kazakhstan	Pakistan
Facebook	54%	49%	53%	46%	63%	60%	71%	82%	84%	70%	73%	48%	79%	71%	91%	34%	71%
YouTube	51%	37%	42%	50%	64%	76%	62%	67%	69%	70%	75%	62%	68%	83%	78%	78%	79%
Instagram	34%	32%	39%	39%	67%	76%	56%	47%	53%	37%	60%	64%	33%	74%	45%	67%	55%
WhatsApp	14%	38%	34%	52%	54%	66%	52%	49%	55%	60%	46%	55%	56%	71%	12%	63%	59%
TikTok	29%	23%	26%	30%	33%	43%	47%	51%	44%	62%	40%	29%	61%	60%	55%	55%	40%
X (formerly Twitter)	25%	25%	17%	13%	30%	33%	30%	33%	32%	40%	21%	34%	26%	43%	25%	13%	21%
Messenger (Meta/Facebook)	24%	22%	23%	16%	15%	27%	21%	28%	39%	28%	24%	18%	31%	22%	46%	10%	22%
Telegram	9%	13%	9%	12%	16%	29%	24%	16%	45%	22%	29%	20%	21%	31%	16%	57%	24%
LinkedIn	10%	13%	9%	8%	11%	21%	11%	9%	16%	26%	13%	18%	24%	16%	11%	5%	16%
Pinterest	13%	9%	7%	14%	11%	15%	8%	11%	8%	12%	7%	10%	12%	14%	9%	6%	11%
Snapchat	15%	12%	22%	13%	3%	6%	5%	6%	15%	5%	12%	24%	8%	4%	6%	3%	22%
Reddit	13%	8%	4%	7%	4%	6%	4%	5%	6%	5%	7%	7%	4%	3%	11%	6%	10%
WeChat	3%	5%	2%	2%	1%	2%	1%	2%	5%	2%	6%	7%	6%	5%	5%	3%	6%



QSocialMedia. You said you get at least some of your news from social media. Which social media platforms, if any, do you use to find news?

Note: Percentages reflect % of all respondents who use a social media platform.

Social Media as a way to reach climate change information sources like friends, family and scientists

	G7				LatAm				Africa + ME					Asia			
	US	UK	France	Germany	Argentina	Brazil	Colombia	Mexico	Egypt	South Africa	Morocco	Oman	Botswana	Indonesia	Philippines	Kazakhstan	Pakistan
Receive climate change information from friends and family on social media	20%	24%	18%	15%	30%	39%	31%	38%	40%	37%	29%	41%	36%	27%	35%	12%	38%
Receive climate change information from scientists on social media	11%	7%	4%	5%	15%	13%	12%	17%	22%	16%	18%	13%	15%	22%	16%	13%	17%



BURSON INSIGHTS, DATA & INTELLIGENCE

Thank You

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