



# Climate Confidence Monitor 2009

# The Climate Confidence Monitor 2009

The majority (65%) of people believe it is very important to reach a deal at the UN climate negotiations in Copenhagen and 79% are in favour of emission reduction targets, according to the findings of this year's Climate Confidence Monitor.

In a year that saw the economic crisis deepen and concern about terrorism increase, climate change slipped one place to fourth on the list of issues that worry people the most. Despite this, the Climate Confidence Monitor, conducted across twelve markets involving 12,000 people, reveals a clear call for action from governments on climate change. Seven in ten (69%) agreed that addressing climate change is at least as important, if not more important than supporting their national economy during the downturn.

Now in its third year, the Climate Confidence Monitor, commissioned by the HSBC Climate Partnership, is beginning to highlight some clear global trends. The results have consistently shown a stronger desire for action in emerging economies than in the developed world.

The four core Climate Confidence Monitor questions, tracked since 2007, measure people's concern, confidence, commitment and optimism about climate change.

*“The results of the Climate Confidence Monitor send a clear message, particularly from the developing world, to world leaders to commit to delivering changes.”*

*Nigel Winser,  
Earthwatch Executive  
Vice President*

## Concern

### **'climate change is the biggest issue I worry about today'**

While concern has dropped across almost all markets, people in emerging economies continue to worry more about climate change.

## Commitment

### **'personally making a significant effort to reduce climate change'**

Despite a drop in concern, respondents say they are at least as committed to reducing their personal impact on climate change as they were in 2008, with France and Mexico showing steep increases in commitment levels.

## Optimism

### **'belief that climate change will be stopped'**

The level of optimism across the board has declined sharply, particularly in emerging markets such as India. Despite this drop, people in emerging markets still remain consistently more optimistic than in developed markets.

## Confidence

### **'those who should be doing something about climate change are doing so'**

Confidence in what leaders are doing to tackle climate change remains low. However consumers expect action from governments and stress the importance of a new global deal on emissions. People surveyed in Brazil and Mexico particularly favour tough emission reduction targets.

## About the research

This research fieldwork was conducted by Lightspeed and analysed by GlobeScan on behalf of the HSBC Climate Partnership. The format was an online survey of 1000 consumers in each of 12 countries whose populations account for 50.3% of the world's people: Australia, Brazil, Canada, China, France, Germany, Hong Kong SAR, India, Malaysia, Mexico, UK and USA. The research methodology is consistent with previous years.

# Concern about climate change

The number of people rating climate change as the major issue they worry about has dropped to fourth place behind global economic stability as the global issue of most concern.

Concern across the board has fallen 8% in the last year, including a significant drop in the emerging markets (Figure 1). This trend is shown across all 12 countries, with the exception of Hong Kong, where concern levels have actually increased 9% in the last year.

Despite the drop, emerging markets still record higher levels of concern than the developed markets. The country with the highest proportion of concerned consumers is Mexico (53%), compared to 15% and 18% in the UK and the USA respectively. Mexico is also the only country that ranks climate change as the global issue of most concern – perhaps an indication that the population is all too aware that their country is likely to experience the effects of climate change more keenly than developed nations.

*“We know that the impacts of climate change will particularly affect the emerging markets and clearly the people of those countries are concerned. We look to the Copenhagen meeting to create a framework for a low carbon economy that will allow emerging markets to prosper and create attractive investment opportunities for businesses worldwide.”*

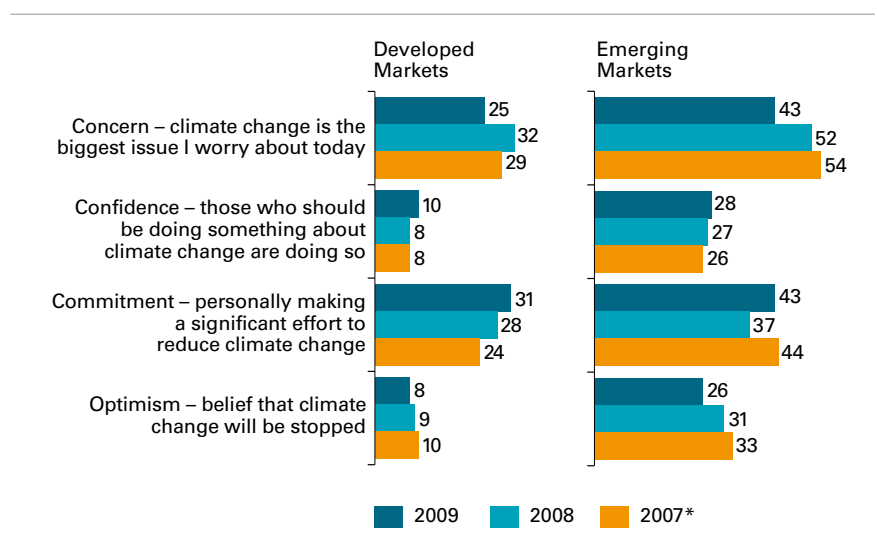
**Stephen Green,**  
Group Chairman,  
HSBC Holdings plc



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Children drinking from a local well in the state of Uttar Pradesh, India. As part of the “Living Ganges Programme”, under the HSBC Climate Partnership, WWF has been trialling breakthrough sewage treatment solutions in rural India.

Figure 1 **Trends across climate change attitudinal statements**  
Attitudinal statements, developed vs emerging markets, 2007–2009



\*6+7 on a scale from 1–7 where 1 means “strongly disagree” and 7 means “strongly agree”  
\*\*Australia, Canada and Malaysia not surveyed in 2007

# Commitment to tackling climate change

The number of people who say that they are personally making a significant effort to help reduce climate change through lifestyle changes has risen by 4% globally since 2008.

This sentiment is rising or steady in all the surveyed countries, and across the developed markets the stated commitment has increased by 7% since 2007 (Figure 1). Even in these challenging economic times, personal intentions to address climate change seem to be becoming embedded in people's behaviour. On average, 48% of people say they are taking some action to reduce their carbon footprint.

*“A deal at Copenhagen will enable consumers to make smarter, greener choices about the way we heat our homes, fuel our cars and power our businesses.”*

*Steve Howard,  
Chief Executive,  
The Climate Group*

When it comes to priorities for government spending, climate change is still viewed as a high priority (Figure 2). Compared with issues such as education, healthcare, crime and national defence, most consumers believe climate change should be about the same priority for public spending. In fact, almost seven in ten (69%) people say addressing climate change is at least as important as supporting the economy in the downturn (Figure 3).

Figure 2 **Priorities for spending public money vs climate change**  
Supporting the national economy during the downturn, by country, 2009

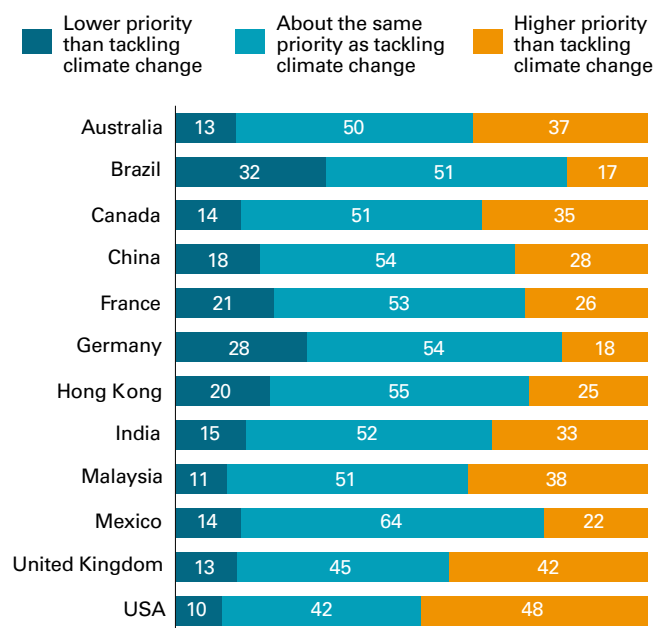
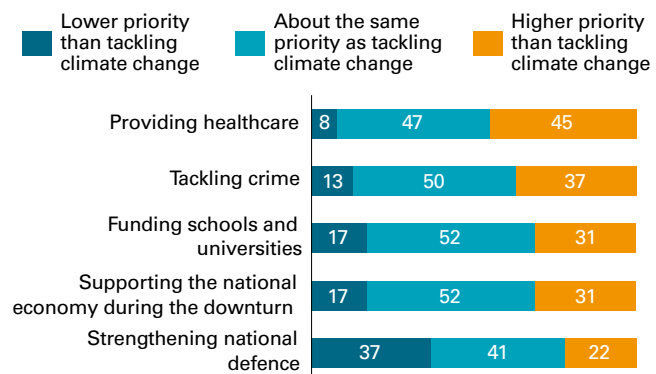


Figure 3 **Priorities for spending public money vs climate change**  
All priorities, ratings across 12 countries, 2009



# Optimism about climate change

Our measure of optimism that climate change can be managed has fallen 6% globally since 2007.

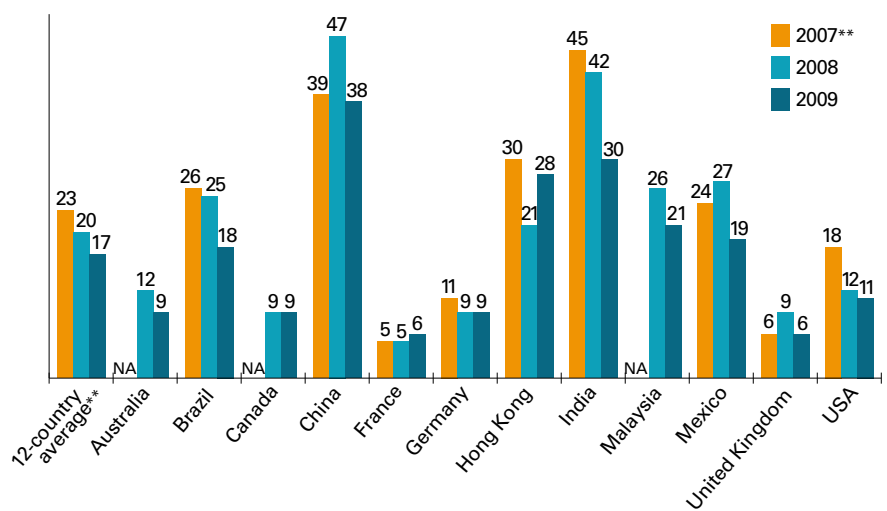
Whilst levels of optimism dropped the most in emerging markets this year, especially in India, three times more people in these countries are hopeful that climate change can be managed than those in the developed world (Figure 4). A fall in optimism and low levels of confidence in leaders suggests that people are becoming more pessimistic about the scale of the challenge that climate change presents.

People still believe that action should be taken, by committing on a personal level to reduce their own impact, by requiring a concrete global deal on emissions at Copenhagen and by calling for bold action to be taken to reduce their own country's greenhouse gas emissions.

The findings reveal that low-carbon choices are becoming embedded in consumer lifestyles, as many people who are pessimistic about climate change are still prepared to take action themselves (Figure 5). Some of these are simple actions that have the additional benefit of saving money, such as reducing electricity use. For example, one of the most pessimistic countries is France, where only 6% of respondents said they believed we will stop climate change, and yet personal commitment to reducing their impact has risen 16% in the last year. Of all the developed markets surveyed, French citizens are also the most likely to regularly make low-carbon lifestyle choices.

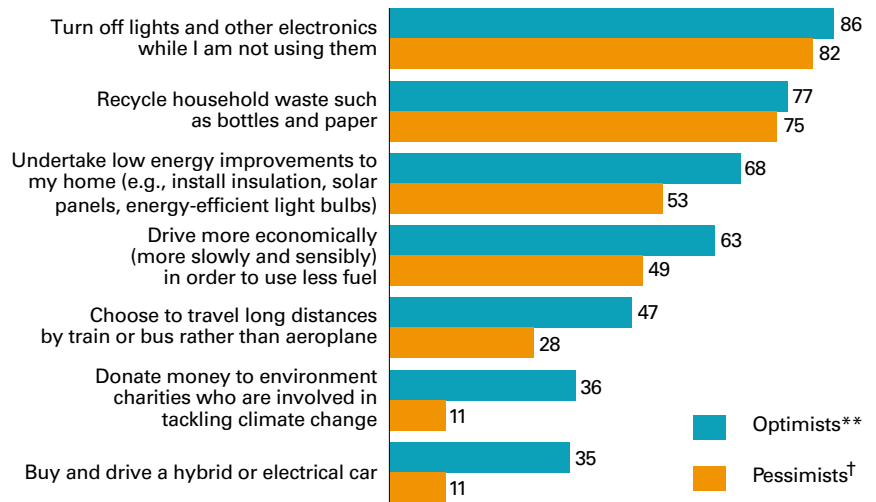
However there is a difference when it comes to undertaking more substantial lifestyle changes. Less than one in three (28%) of those who are pessimistic would choose to travel by train or bus rather than by aeroplane, compared to 47% of optimists (Figure 5).

Figure 4 Trends in levels of optimism\* All countries, 2007–2009



\*6+7 on a scale from 1–7 where 1 means “strongly disagree” and 7 means “strongly agree” to “I believe we will stop climate change”  
 \*\*Australia, Canada and Malaysia not surveyed in 2007

Figure 5 Low carbon activism among optimists and pessimists Ratings\* across 12 countries, 2009



\*6+7 on a scale from 1–7 where 1 means “I don’t do this” and 7 means “I do this as much as I can”  
 \*\*Subsample: those rating 6+7 on a scale from 1–7 where 1 means “strongly disagree” and 7 means “strongly agree” to “I believe we will stop climate change”  
 †Subsample: those rating 1+2 on a scale from 1–7 where 1 means “strongly disagree” and 7 means “strongly agree” to “I believe we will stop climate change”

# Confidence in leadership on climate change

Consumers continue to place high expectations on governments to address climate change, with 65% of respondents worldwide expressing their support for a new global deal on carbon emissions.

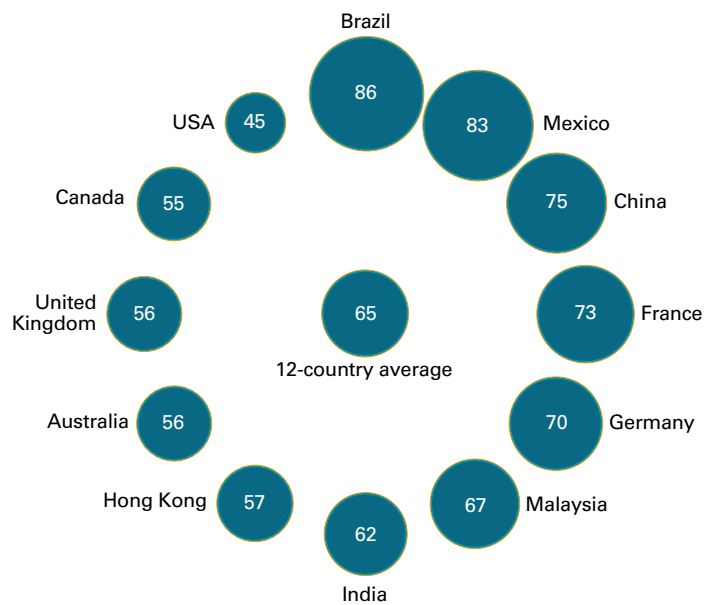
Majorities of respondents in all countries – except the USA – believe that it is very important that a deal is signed in Copenhagen. In Brazil and Mexico a particularly high proportion of respondents (86% and 83%) believe it is very important that a deal is reached. This compares with just over half (56%) in the UK and Australia, and 73% in France. Globally, only 2% of people feel a new climate deal isn't important at all.

The 2009 findings also reveal that, across the board, 79% believe that their own country should reduce emissions to either meet or exceed a 50-80% cut in emissions by 2050, the minimum required by developed countries to achieve manageable levels of climate change. Consumers in Brazil and Mexico feel most strongly about global emissions reductions and Mexicans in particular believe that countries should go further than the 50-80% cut.

When asked about which countries and regions should exceed the target, respondents feel that China, North America and Europe should do so, but a clear majority of consumers feel that all countries and regions need to reduce CO<sub>2</sub> emissions to at least meet this recommended reduction target.

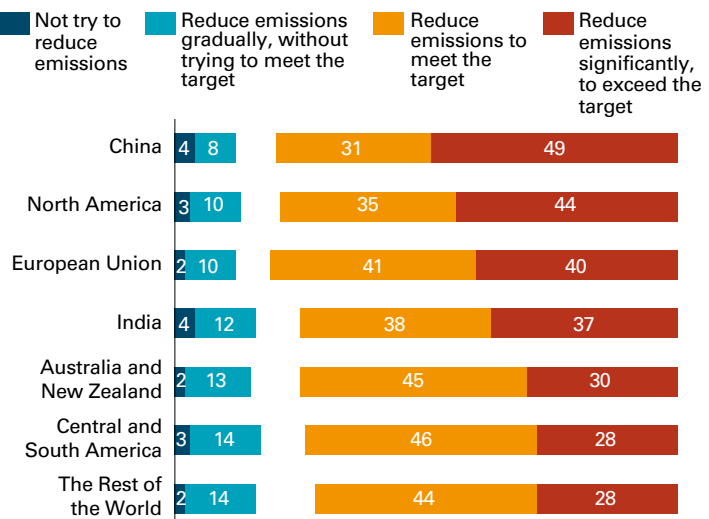
Compared with the research sample, Asian countries are the most confident that action is already being taken. This is particularly the case in China and Malaysia, and a sharp rise in confidence is noticeable in Hong Kong since 2008. Consumers in the developed markets are the least confident that the necessary actions are being taken, with France coming in at just 7% in agreement.

Figure 6 **Importance of new global deal on emissions**  
Important,\* by country



\*6+7 on a scale of 1-7, where 1 is "Not important at all", 6 is "Very important" and 7 is "Extremely important"

Figure 7 **Desired approach to emissions reduction targets**  
Perceptions across 12 Countries, 2009



The white space in this chart represents "Don't know/Not applicable."

# What does this tell us?

Climate change is an important issue for people around the world, and they are still not confident that leaders and organisations are doing enough.

The Climate Confidence Monitor 2009 shows clear support for a deal at the United Nations Climate Change Conference in Copenhagen and for a global emissions reduction target to be set.

## Support for strong leadership at Copenhagen

Consumers feel strongly about the importance of a deal being reached. People in all countries support a budgetary commitment to tackling climate change despite the increased importance of competing priorities. We are seeing a demand for carbon dioxide emission reductions across the globe. Respondents everywhere believe that all countries must reduce their emissions regardless of whether they are in emerging or developed regions. A global call to action is clear.

## Climate change higher on the agenda in emerging economies

Attitudes towards climate change remain significantly different in emerging countries compared to the developed world. Consumers in the emerging economies appear to be considerably more concerned and personally committed to reducing their own impact on climate change than people in Australia, Canada, France, Germany, the UK and the USA. This may indicate an awareness of their greater risk to the more devastating impacts of climate change. People in emerging economies are more upbeat about the world's ability to reduce the impacts of climate change.



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A low energy LED lighting pilot project in Tianjin, China. Creating cleaner cities as part of the HSBC Climate Partnership, The Climate Group are piloting outdoor LED lighting in some of the world's biggest cities to demonstrate the energy and financial savings possible if city governments were to scale up the technology.



© Philip Ross / Earthwatch

An HSBC employee from India learns about the impacts of climate change at the Earthwatch Regional Climate Centre in India. HSBC Climate Champions are working alongside leading scientists to design workplace projects that help HSBC embed sustainable business practice.



© Markku Lajavaara / STRI

The Smithsonian Tropical Research Institute has implemented a vast global field experiment encompassing nearly 2,000 ha of forest and 3.5 million trees since the launch of the HSBC Climate Partnership.



© Jiri Rezac / WWF-UK

Climate change is having an impact on rivers around the world, including in the UK. WWF is working to protect rivers across the world as part of the HSBC Climate Partnership, including the Upper Lea in the UK where two tributaries now dry out completely at certain times of the year.

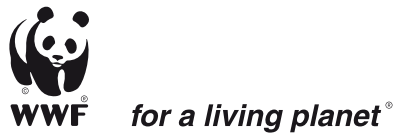
The HSBC Climate Partnership is a five year programme running from 2007-2012 between HSBC, The Climate Group, Earthwatch, Smithsonian Tropical Research Institute and WWF. For further information on the work of the partnership, please visit [www.hsbc.com/sustainability](http://www.hsbc.com/sustainability).



## THE ° CLIMATE GROUP



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To explore the interactive results of the  
Climate Confidence Monitor please visit:  
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Designed by Creative Conduct Ltd, London

Issued by HSBC Holdings plc  
Group Corporate Sustainability  
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London E14 5HQ