

## PRESS RELEASE

***Survey finds that over 35% of 'American business flights' are threatened by telepresence***  
*American business flyers are particularly likely to think about switching from flying to telepresence; and we explore why this might be*

**Montreal, May 29<sup>th</sup> 2009**

### ***In a nutshell***

Technology looks set to replace a portion of business travel by air, according to a new report<sup>1</sup> from Haddock Research & Branding Inc., a full-service market research agency focusing on climate change and the low-carbon economy. The survey showed business travellers are interested in telepresence – defined as video-phone or video-conferencing – as an alternative to short- and long-business flying trips, with American business travellers the most interested in replacing trips with this technology. On average, 35-40 percent of airline seats taken for business, by Americans, might be substituted by telepresence if it became widely available. In comparison, around 25 and 20 percent of such airline seats taken by English and Canadian business travellers, respectively, might be replaced in this way.

There appears to be a degree of 'low-carbon' appeal for telepresence as an alternative to business flying, but it is not a predominant influence. This is based on an analysis of the 'interest in telepresence' according to respondents' personal concern about climate change.

The study, run in late-September/early-October 2008<sup>2</sup>, was conducted amongst nationally representative samples of over 1,000 people per country in Canada, England and the USA.

### ***Key Findings***

Within the survey, respondents were asked how many short-trip flights (up to 4 hours) and long-trip flights (over 4 hours) for both business and leisure they had typically taken per year, over the past 3 or 4 years. After a discussion of video-phone and video-conference systems, respondents were then asked about how many of these flights they might replace should such systems be available to them. The analysis then summed the responses, removed outliers, and then calculated the proportion of flights saved.

This analysis indicates that the switch potential is rather higher in the USA than either Canada or England. On average 35%/40% of airline seats taken for business, by Americans, might be substituted by telepresence, if it became widely available, compared to around 20% of those taken by Canadian business flyers, and around 25% of those taken by English business flyers.

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<sup>1</sup> Unless otherwise stated, all results described in this press release come from Environmental Choices 2008, Section report 3e 'Flying & telepresence' - [http://haddock-research.com/environmental\\_choices/EC2008\\_3e\\_Flying\\_and\\_Telepresence](http://haddock-research.com/environmental_choices/EC2008_3e_Flying_and_Telepresence)

<sup>2</sup> Conducted as part of the Environmental Choices 2008 study, [http://www.haddock-research.com/public\\_opinion\\_monitor](http://www.haddock-research.com/public_opinion_monitor)

Whether telepresence actually leads to this reduction of business airline travel will depend on many other factors – such as whether telepresence really does become ubiquitous, how the airlines respond (including whether they can create new markets), whether there is a significant ‘rebound effect’, the pricing and marketing of the competing approaches, changes to the risk (or perceived risk) of air travel disruption, as well as changes to overall market and social conditions (such as changes to the price of oil and price of emitting carbon).

In all countries, *Climate Citizens*<sup>3</sup> tended to show a somewhat greater interest in the telepresence idea as a workplace tool, than other groups. They also tended to indicate a marginally higher level of substitution of current business flights with telepresence, than other flyers. An inference seems to be that there is a degree of “low-carbon” appeal for telepresence as an alternative to business flying, but it is not a predominant influence. Rather, it seems to be that being “low-carbon” is part of a mix of reasons for why flyers would switch at least some of their flights to a telepresence alternative.

In trying to understand the relative enthusiasm of Americans to switch their business travel to telepresence, some elements of the explanation could include that:

- there has been a culture of business flying in the USA and so there is a high baseline volume of business flights currently taking place in this country. Amongst all American adults, 9% make ‘3 or more short-trip business flights a year’ and 8% make ‘3 or more long-trip business flights a year’. In England the comparative figures are 5% and 3% respectively; and in Canada they are 6% and 4%.
- video-communication users and heavy business flyers are particularly likely to be the same people in the USA. In America, 55% of ‘telepresence users’ are also ‘heavy business flyers’; whereas in England the equivalent figure is just 12%, and in Canada it is 28%.
- Americans are more likely to have installed a high-quality video-communication system at home. Such exposure would likely make people more familiar with the technology, and encourage people to use it more in different areas of their lives. The survey provides details of exactly what these usage levels are.
- Americans are less likely to have access to high-speed train alternatives than the English, which could provide a low-carbon alternative to flying. 26% of American ‘heavy business flyers’ never use the train compared to just 4% of those from England (and 54% of those from Canada).

Further information on this topic can also be found at [www.haddock-research.com/](http://www.haddock-research.com/) and look for *Environmental Choices 2008, Section report 3e, Flying & telepresence*. This research also provides penetration and profile details of ‘telepresence leaders’ – ‘users of video-communication system’ who ‘like a great deal’ the idea of using a high-quality telepresence system at home or work.

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<sup>3</sup> A segmentation, developed within the Environmental Choices 2008 study, has classified people into 3 types according to their attitudes towards climate change – from *Climate Citizens* (who are most engaged with climate change), to *Mild Greens* (who are moderately engaged) to *Sceptics & Uninvolved* (who are least engaged). More details are found within section report 1a ‘Attitudes towards Climate Change’ - [http://haddock-research.com/environmental\\_choices/EC2008\\_1a\\_Attitudes](http://haddock-research.com/environmental_choices/EC2008_1a_Attitudes)

## **About Haddock Research & Branding, Inc.**

Haddock Research & Branding Inc. is a full-service market research agency focusing on climate change and the low-carbon economy. Making use of the latest advances in survey design, Haddock advises businesses on how best to develop profitable low-carbon opportunities; and provides governments with the vital information they need to mobilize people to take action on climate change. For further information, visit our website - [www.haddock-research.com](http://www.haddock-research.com)

For enquiries, please contact Peter Winters, President, Haddock Research & Branding, Inc. [peter.winters@haddock-research.com](mailto:peter.winters@haddock-research.com) . Free summaries of the survey are available from the Haddock website<sup>4</sup>.

The next part of this press release provides some context to low-carbon alternatives to flying, and about telepresence specifically. In the final section of this document are charts which provide supporting evidence for this press release.

## **About low-carbon alternatives to flying**

Over the next couple of decades there seems little prospect that aviation can become 'low-carbon'; and this presents opportunities for credible alternatives. In short, the requirement to limit greenhouse gas emissions makes aviation commercially vulnerable.

Yet, there is no single alternative to flying. The alternatives depend greatly on the *context* of the decision that an individual might make in choosing whether or not to make a flight. Three key considerations are described below.

### 1. *Business v Leisure*

First, the context of *business* travel tends to be very different to *leisure* travel. Business travel tends to be about getting people together, with the overall trip being quite short, and a need to get there-and-back quickly, a minimal amount of 'dead time', less personal discretion about whether or not to fly, and other people paying travel costs. Leisure travel is more often about visiting a place and with a great deal of personal discretion over the price paid and travel style given an individual's time and budget constraints. The Environmental Choices study shows that, taking all countries together, *Climate* Citizens fly significantly fewer short-trip leisure flights than other adults<sup>5</sup>.

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<sup>4</sup> Visit the Free Reports section of [www.haddock-research.com](http://www.haddock-research.com); and registration is required to download the free reports. More detailed results are available in the paid reports.

<sup>5</sup> See Haddock Research & Branding, Environmental Choices 2008, Section report 3e 'Flying & telepresence' - [http://haddock-research.com/environmental\\_choices/EC2008\\_3e\\_Flying\\_and\\_Telepresence](http://haddock-research.com/environmental_choices/EC2008_3e_Flying_and_Telepresence)

## 2. *Alternative travel options given specific geographical location*

Alternative travel options vary greatly according to where an individual is located geographically, and where he wants to get to. High-speed trains travel can be as fast as flying for shorter trips throughout much of Europe – at much lower emissions. For example, English flyers from the London area might find train travel to the continent a convenient alternative to flying; and Eurostar claim that emissions are around a tenth that of equivalent air travel<sup>6</sup>. Yet, few Americans and Canadians have access to high-speed rail, and the emissions reductions from Amtrak compared to flying seem less pronounced than for Eurostar (Amtrak estimates that carbon emissions are around 45% that of equivalent air travel<sup>7</sup>).

## 3. *Social/Cultural context*

Each individual does not make their decisions completely independently – we are all influenced by other people and the choices on offer. In England there is a culture of short-haul leisure flying, influenced by the business model adopted by such low-cost carriers as Ryan Air and EasyJet as well as proximity to holiday destinations throughout Europe. From our Environmental Choices survey<sup>8</sup> we can see that 18% of English adults are 'heavy short-trip leisure flyers' – that is they make at least 3 short-trip leisure flights a year. In comparison, just 6% of Canadians and 11% of Americans are such 'heavy short-trip leisure flyers'. Around a half of all flights taken by the English are for such 'short-trip leisure' flights compared to around a quarter of those taken by the Canadians and Americans. According to a 2007 study, adults in Great Britain have the highest average emissions from flying amongst any of 20 major countries studied<sup>9</sup>.

And using telepresence as an alternative to flying is also heavily influenced by cultural factors. It requires familiarity with the technology, knowing how and when to use it – and for others to use it too!

Full immersion 'telepresence' refers to technology that *'creates the illusion that all participants from two or more locations in a meeting are in the same room, allowing for a more dynamic, interactive, realistic and life-like interaction. This experience is achieved using high-definition, life-sized images and wideband spatial audio, coupled with studio-style lighting, and an immersive room build-up that ensures proper seating positions for all participants so everyone can truly see eye-to-eye.'*<sup>10</sup>.

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<sup>6</sup> Greener than flying; Eurostar emits a tenth of the CO2 of flying to our core destinations. Eurostar, May 2009, [http://www.eurostar.com/UK/uk/leisure/about\\_eurostar/environment/greener\\_than\\_flying.jsp](http://www.eurostar.com/UK/uk/leisure/about_eurostar/environment/greener_than_flying.jsp)

<sup>7</sup> MEET ARTE! Amtrak Recognizes the Environment, so we've taken that motto and turned it into ARTE, the Environmental Engineer. His mission: to encourage environmental awareness – turning passion for the rails into passion for the earth. Amtrak, May 2009, [http://www.amtrak.com/ws/seedling\\_flyer.pdf](http://www.amtrak.com/ws/seedling_flyer.pdf)

<sup>8</sup> See Haddock Research & Branding, Environmental Choices 2008, Section report 3e 'Flying & telepresence' - [http://haddock-research.com/environmental\\_choices/EC2008\\_3e\\_Flying\\_and\\_Telepresence](http://haddock-research.com/environmental_choices/EC2008_3e_Flying_and_Telepresence)

<sup>9</sup> TGI Green Values, 2007, page 7, <http://www.wpp.com/WPP/Marketing/ReportsStudies/Greenvalues.htm>

<sup>10</sup> This definition of telepresence has been provided by Tandberg, in an email to Haddock Research, in May 2009.

## ***About telepresence as a low-carbon alternative to business flying***

A general observation about low-carbon environmental choices that people make is that they can usefully be split into 2 types. The first type is those which offer what is known as 'green sweet spots' or 'beautiful coincidences' - green propositions that save money (cycling; turning the lights off; energy efficiency and so on). The second type is those choices which typically cost extra money (buying carbon-offsets, organic food, green electricity and so on).

Telepresence can be considered as being in the first category. It has the potential to act as a 'green sweet spot', although some initial investment in capital and time would normally be required. It is in contrast to other low-carbon alternatives to flying which can add costs for the business traveller, such as carbon-offsets, and (sometimes) taking the train.

Almost all telepresence companies are positioning their services, at least in part, on their low-carbon potential compared to flying. They also talk about the relative cost savings and time savings of telepresence – and Avistar<sup>11</sup>, Polycom<sup>12</sup> and Tandberg<sup>13</sup> offer tools to calculate ROI and carbon savings. When Financial Directors are looking for cost-savings in hard economic times, they are more likely to look favourably on low-carbon solutions which can save money, than those which add costs!

In deciding on whether or not to implement new technology, such as telepresence, organisations do need to consider the benefits of acting now rather than to delay. By acting now, they can start generating savings and future-proofing against shocks to airline travel (such as flight disruptions and oil price increases) – yet by waiting they may benefit from improved technology, better prices and/or use recommendations and experience of others. Companies also need to decide which types of video-communications/telepresence system they need to implement for their specific needs. There are a wide range of solutions to choose from – from desktop systems to 'full immersion' systems. They also need to think about the best telepresence provider to partner with, to keep in step with technology developments<sup>14</sup>.

Telepresence is emerging as a major growth sector. As one of Gartner's top ten projections of 2009, it is predicted that '2.1 million airline seats per year by 2012' will be lost to telepresence, 'losing the travel industry \$3.5 billion annually'<sup>15</sup>.

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<sup>11</sup> See Avistar 'ROI and Green Calculator' at <http://www.avistar.com/resources/Desktop-Video-Conference.html>

<sup>12</sup> Polycom 'What are meetings costing you?' at [http://www.polycom.com/products/resources/roi/en\\_roi\\_green.html#](http://www.polycom.com/products/resources/roi/en_roi_green.html#)

<sup>13</sup> Tandberg 'ROI Calculator' at <http://www.tandberg-business-advantage.com/>; 'Carbon Footprint Calculator' at <http://www.seegreenow.com/HowGreenAreYou.aspx>; Commuter Calculator - <http://www.seegreenow.com/CommuterCalculator.aspx>

<sup>14</sup> A recent report to guide investment decisions is "The Value of Video Communications", Peter Brockmann, May 13, 2009 - <http://www.brockmann.com/report-library/abstracts-collaboration-mainmenu-120/1302-the-value-of-video-communications.html>

<sup>15</sup> Gartner Predicts Video Telepresence Will Replace 2.1 Million Airline Seats Per Year by 2012, Losing the Travel Industry \$3.5 billion annually, February 6, 2009, Webwire, <http://www.webwire.com/ViewPressRel.asp?aId=86544>

Companies which have recently announced their investments in telepresence include Wachovia<sup>16</sup>, Amba Research<sup>17</sup> and The Climate Group<sup>18</sup>. As part of The Climate Group announcement, Jim Walker, founder and chief operating officer, commented on how important it is for their worldwide senior management team to meet face-to-face 'four or five times' a year, and how useful it has been to replace a couple of these face-to-face meetings, this year, with telepresence – using the Polycom immersive system<sup>19</sup>.

Indeed, the Haddock research study results show that currently few business travellers anticipate that video-communications will *totally* eliminate their need for business travel; it is more a matter of reducing the number of trips they take.

Avistar also suggests that this new technology will change how business flyers work *whilst* they do travel.

*"We see business use of videoconferencing on the rise as a substitute for travel, but we also see it being used by business people as they travel,"* said Stephen Epstein, Chief Marketing Officer, Avistar. *"Just this past week a traveller set up an Avistar videoconferencing call from a Virgin Airlines plane equipped with WiFi. It's clear that as time goes on, videoconferencing will become ubiquitous as corporations and their travellers recognize its essential value in conducting business."*<sup>20</sup>

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<sup>16</sup> Wachovia Has Saved \$1.5 Million Using Videoconferencing: It's also spent nearly \$1.5 million on videoconferencing equipment. But through T&E savings, it's already in the black on its investment in telepresence. By Penny Crosman, November 13, 2008 [http://wallstreetandtech.com/it-infrastructure/showArticle.jhtml?articleID=212002345&cid=RSSfeed\\_WST\\_All](http://wallstreetandtech.com/it-infrastructure/showArticle.jhtml?articleID=212002345&cid=RSSfeed_WST_All)

<sup>17</sup> Amba Research Selects Avistar Desktop™ Videoconferencing, April 28, 2009 [http://www.avistar.com/company/news\\_detail.aspx?id=151](http://www.avistar.com/company/news_detail.aspx?id=151)

<sup>18</sup> Polycom Telepresence Helps The Climate Group Collaborate Globally, May 20, 2009 <http://www.marketwire.com/press-release/Polycom-Inc-NASDAQ-PLCM-992423.html>

<sup>19</sup> Jim Walker, The Climate Group, interview, May 2009 [http://www.youtube.com/watch?v=t1vB69ON\\_ec](http://www.youtube.com/watch?v=t1vB69ON_ec)

<sup>20</sup> As quoted in an email to Haddock Research, in May 2009.

## Proportion of business flights undertaken by "Heavy Flyers"

Data shows trips per year

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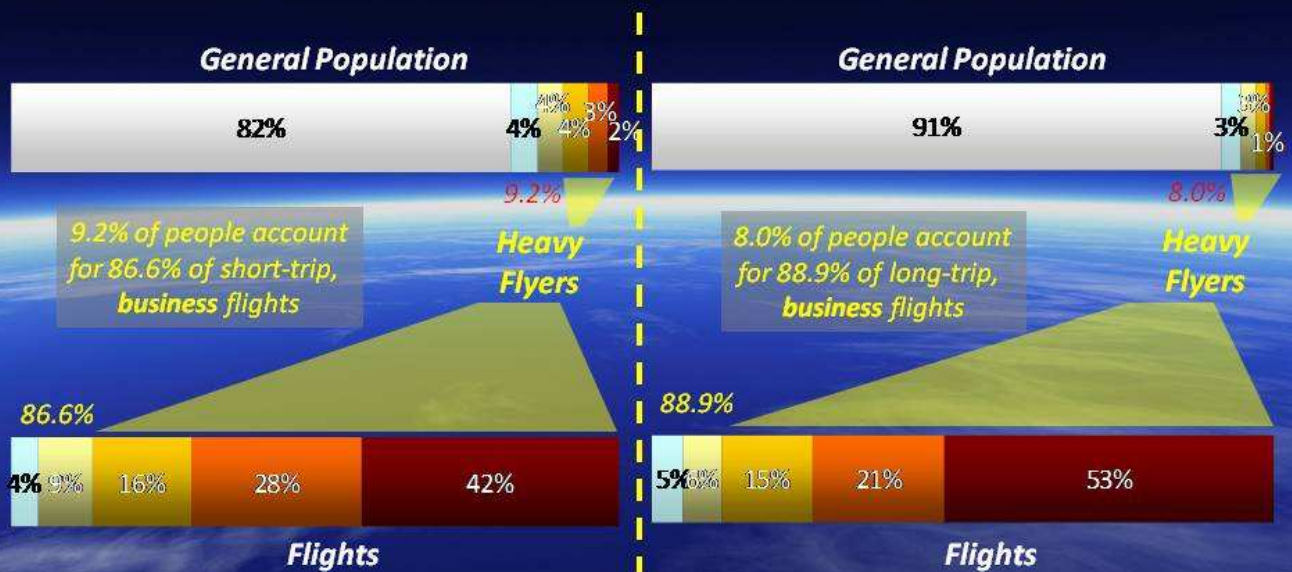
- interim edition



Shorter trips, up to 4 hours, pa

Longer trips, over 4 hours, pa

■ No trips ■ 1 trip ■ 2 trips ■ 3 to 5 trips ■ 6 to 10 trips ■ 11+ trips



Source: Q13, The Environmental Choices 2008, "Over the last 3 or 4 years, approximately how many times a year have you flown for business and pleasure - on average? Please treat a round trip as one trip" (fieldwork: 25 Sep to 3 Oct 2008)

One round trip = one trip

Base: All American respondents, n=1046  
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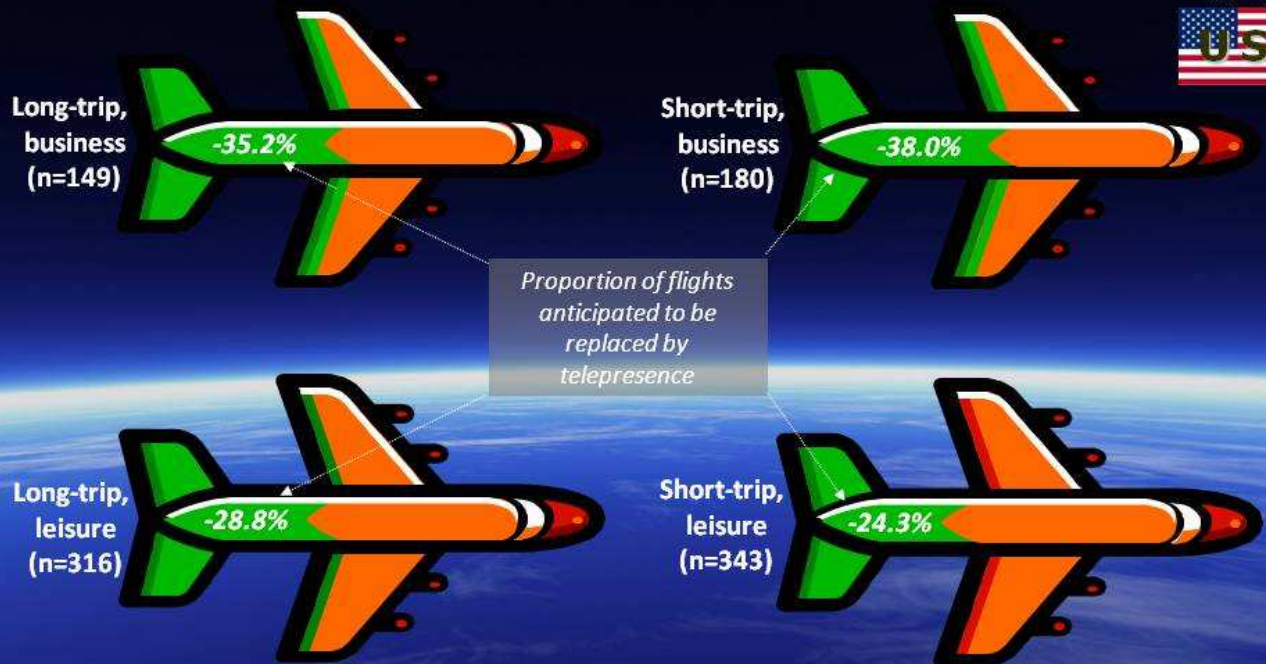
info@haddock-research.com

## Summary of substitution potential of flying with video-phone/video-conferencing: **Outliers Excluded**

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Source: Q13, The Environmental Choices 2008, "Over the last 3 or 4 years, approximately how many times a year have you flown for business and pleasure – on average? Please treat a round trip as one trip." & Q44 "Of the flights you generally take each year, what proportion, if any, do you think you might replace with video-telephone/video-conference systems (either "budget" versions or more high-quality and expensive versions) if it were available to you?" (fieldwork: 25 Sep to 3 Oct 2008)

Base: American long-trip bus flyers, n=149  
 American short-trip bus flyers, n=180  
 American long-trip leisure flyers, n=316  
 American short-trip leisure flyers, n=343

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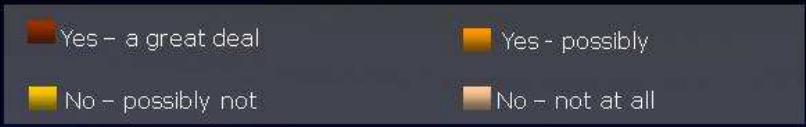
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## Like idea of using **high-quality** video-phone/video-conferencing at **work**\*

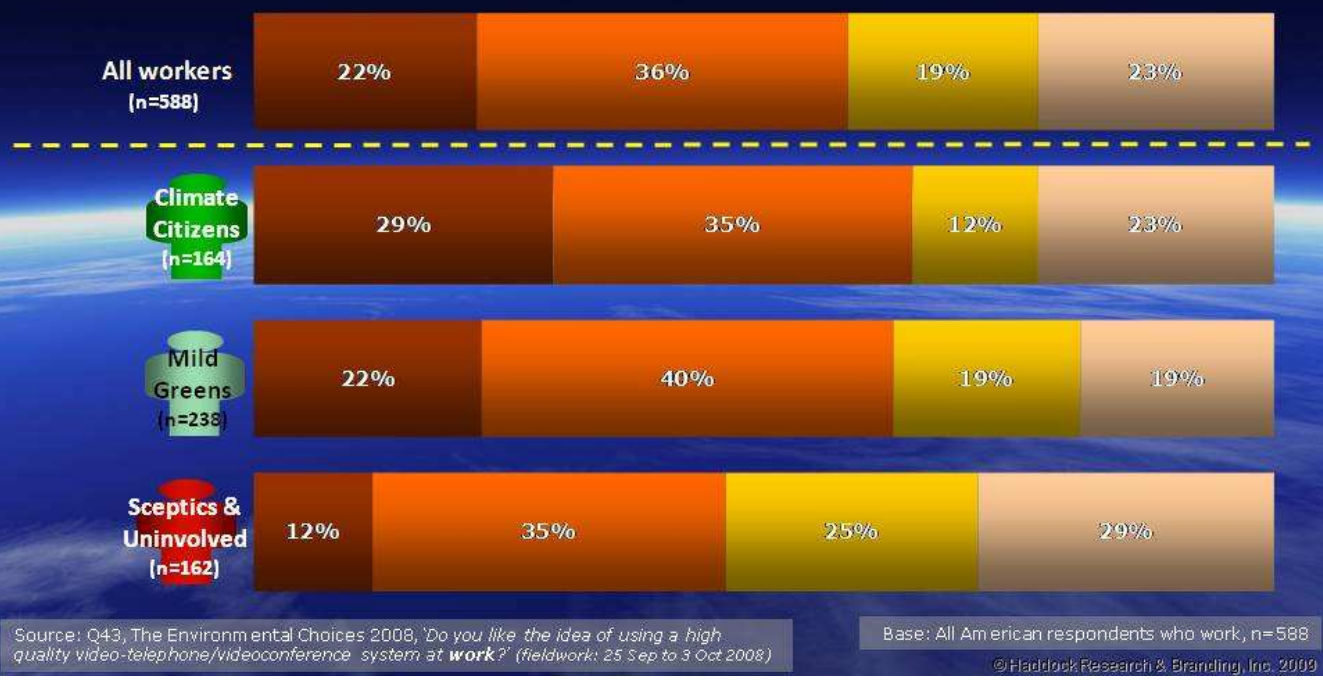
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\* Only asked of those who work (n=588)



Source: Q43, The Environmental Choices 2008, 'Do you like the idea of using a high quality video-telephone/videoconference system at work?' (fieldwork: 25 Sep to 3 Oct 2008)

Base: All American respondents who work, n=588  
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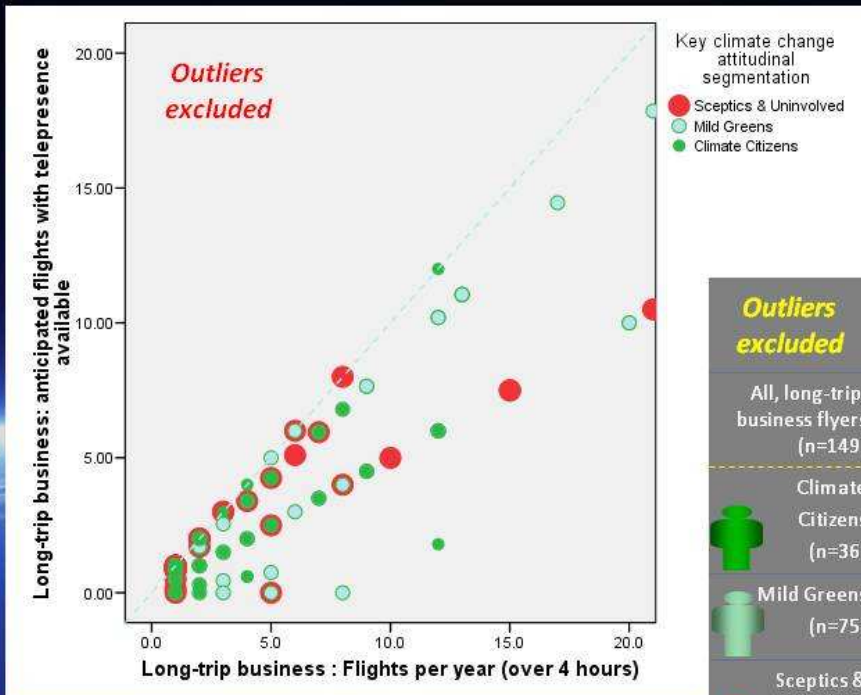
## Proportion of **business** flights that could be replaced by use of video-phone/video-conferencing : **long-trip (over 4 hours)**



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Calculation based on, for each respondent:  
(actual flights) multiplied by  
(1 - proportion of flights replaced).

None/almost none (<5%) = 1.00  
A few (5%-29%) = 0.85  
Some (30% - 69%) = 0.50  
Most (70% - 94%) = 0.15  
All/almost all (>95%) = 0.00

<b>Outliers excluded</b>	Current Flights	Anticipated with telepresence	Reduction
All, long-trip, business flyers (n=149)	658.0	426.4	<b>-35.2%</b>
Climate Citizens (n=36)	141.0	87.1	<b>-38.3%</b>
Mild Greens (n=75)	370.0	242.5	<b>-34.5%</b>
Sceptics & Uninvolved (n=33)	123.0	84.8	<b>-31.1%</b>

Source: Q13, The Environmental Choices 2008, 'Over the last 3 or 4 years, approximately how many times a year have you flown for business and pleasure - on average? Please treat a round trip as one trip' & Q44 'Of the flights you generally take each year, what proportion, if any, do you think you might replace with video-telephone/video-conference systems (either "budget" versions or more high-quality and expensive versions) if it were available to you?' (fieldwork: 25 Sep to 3 Oct 2008)

Base: American respondents who fly at least one long-trip business flight a year (and up to 20) and are either Climate Citizens, Mild Greens or Sceptics & Uninvolved, n= 144

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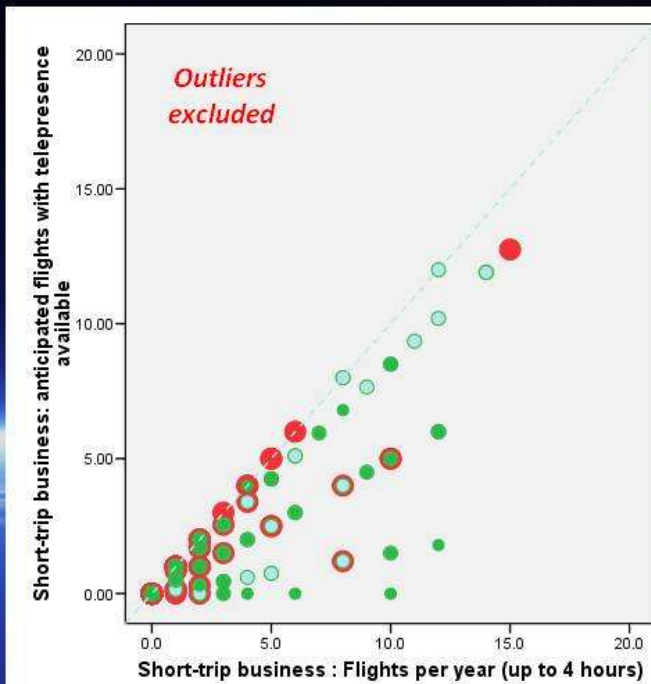
## Proportion of **business** flights that could be replaced by use of video-phone/video-conferencing : **short-trip (up to 4 hours)**



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Key climate change attitudinal segmentation

- Sceptics & Uninvolved
- Mild Greens
- Climate Citizens

Calculation based on, for each respondent:  
(actual flights) multiplied by  
(1 - proportion of flights replaced).

- None/almost none (<5%) = 1.00
- A few (5% - 29%) = 0.85
- Some (30% - 69%) = 0.50
- Most (70% - 94%) = 0.15
- All/almost all (>95%) = 0.00

<b>Outliers excluded</b>	Current Flights	Anticipated with telepresence	Reduction
All, short-trip, business flyers (n=180)	763.0	473.0	<b>-38.0%</b>
Climate Citizens (n=42)	189.0	97.8	<b>-48.3%</b>
Mild Greens (n=86)	395.0	258.1	<b>-34.7%</b>
Sceptics & Uninvolved (n=47)	144.0	101.7	<b>-29.4%</b>

Source: Q13, The Environmental Choices 2008, 'Over the last 3 or 4 years, approximately how many times a year have you flown for business and pleasure - on average? Please treat a round trip as one trip' & Q44 'Of the flights you generally take each year, what proportion, if any, do you think you might replace with video-telephone/video-conference systems (either "budget" versions or more high-quality and expensive versions) if it were available to you?' (fieldwork: 25 Sep to 3 Oct 2008)

Base: American respondents who fly at least one short-trip business flight a year (and up to 20) and are either Climate Citizens, Mild Greens or Sceptics & Uninvolved, n= 175

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## There is a high correlation between being a video communication user\* & being a 'heavy flyer'

\* Video communication users are those who have used **any** video-phone /video-conference solution at home or work:- Skype (with video), VSee, or a high-quality video-phone communication system at either home or work

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	Business, long-trip	Business, short-trip	Business, all flights
Video Communication Users (n=104)	Heavy Flyers: 47.1%	Heavy Flyers: 48.1%	Heavy Flyers: 54.8%
Non-Users (n=942)	Heavy Flyers: 3.7%	Heavy Flyers: 4.9%	Heavy Flyers: 6.4%

Source: Q41, The Environmental Choices 2008, 'What is your personal experience of video-phone/video-conferencing?' & Q13, 'Over the last 3 or 4 years, approximately how many times a year have you flown for business and pleasure - on average? Please treat a round trip as one trip' (fieldwork: 25 Sep to 3 Oct 2008)

Base: All American respondents, n=1046

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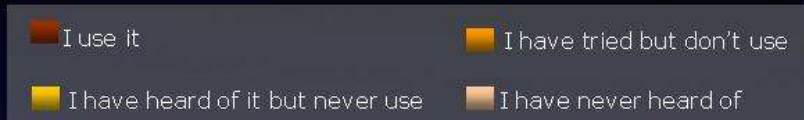
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## Awareness & Usage of video-phone/video-conferencing

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\* Only asked of those who work (n=588)



Source: Q41, The Environmental Choices 2008, 'What is your personal experience of video-phone/video-conferencing?' (fieldwork: 25 Sep to 3 Oct 2008)

Base: All American respondents, n=1046

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The following 5 slides illustrate how the cluster analysis, performed on the attitudinal questions regarding climate change, built the 3 groups we have identified

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## 33.1% Climate Citizens

*As a prerequisite to being a Climate Citizen, you would believe that climate change is caused by human activity, that it is a serious threat and that we should focus on changing the way we do things **now** to tackle this. All Climate Citizens believe these things. There is some variability in how much climate change would impact the decisions you make in your life, and your personal interest in climate change - though, on average, it would be more than other groups.*

## 36.2% Mild Greens

*Mild Greens see climate change as one of a number of serious threats that we all face. You would likely believe that climate change is caused by human activity, but alternatively you might tend to believe it has natural causes. You would most likely believe that climate change should be handled by **balancing** changing what we do now with managing problems "if and when" they occur. You would probably know a reasonable amount about climate change (but maybe not), and it is sometimes a consideration in your decision-making (but maybe not).*

## 26.6% Sceptics & Uninvolved

*Sceptics & Uninvolved do not believe that climate change is a serious risk. Although nearly half think the climate is changing, few think that it is mainly caused by human activity - and a sizeable minority really have no opinion on the issue. Climate change has very little impact on the decisions you make in your lives.*

Source: Q23-Q27, The Environmental Choices syndicated study, 2008 (fieldwork: 25 Sep to 3 Oct 2008)

\* 4.1% of respondents could not be classified by the cluster analysis into these 3 coherent groups

Base: All respondents, n=3156

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There is divided opinion about climate change in each country. Having said that, Canada is the most progressive country and USA, the least.

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Source: Q23-Q27, The Environmental Choices syndicated study, 2008 (fieldwork: 25 Sep to 3 Oct 2008)

Base: All respondents, n=3156  
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