

PRESS RELEASE

The tensions in Canadian society over Big Oil and climate change

Canadians are particularly disapproving of oil companies for their stance and actions on climate change. This level of concern reflects the tension between Canadians' relatively high level of concern about climate change, and Canada's actual poor climate change performance, much of which is related to the development of the tar sands. A number of Canadian public commentators, and organisations, are leading the debate about the environmental impacts of tar sands development.

Montreal, September 22nd 2009

In a nutshell

In each of Canada, England and the US, 'Esso / Exxon' is the most widely disapproved of company for its stance and actions on climate change. Shell is also quite widely disapproved of in Canada and England. Netting all oil companies together, we can see that in each country, 'Big Oil' is the most widely disapproved of industry sector when it comes to climate change.

Big Oil is particularly disapproved of in Canada where 8.1% of Canadians named an oil company as one they disapproved of for its stance/actions on climate change. This compares with 2.3% of English people and 4.7% of Americans. Amongst *Climate Citizens*¹, the proportions are higher on this issue - 13.3% of Canadian *Climate Citizens*, 4.7% of English *Climate Citizens* and 11.1% of American *Climate Citizens* disapprove of at least one oil company for its stance/actions on climate change.

Quebecers are particularly disapproving of oil companies - 12.6% did so. In contrast, 7.8% spoke approvingly of the efforts of Hydro-Quebec on climate change.

The study, run in late-September/early-October 2008², was conducted amongst nationally representative samples of over 1,000 people per country in Canada, England and the USA.

Key Findings

Within the survey, in an open-ended/non-prompted question, respondents were asked to name any company that they admired for their stance and actions regarding climate change - and, in a similar way, any company they disapproved of in regards to climate change stance/actions. Respondents were allowed to mention upto 5 companies for each question.

Responses to this question indicates that most people do not have a top-of-mind company which they consider to be either a climate change hero, or villain - although, in each country, *Climate Citizens* are rather more likely to think of companies than *Sceptics & Uninvolved*.

In each country, there is a large spread of companies which are well-regarded for their actions and stance on climate change. In Canada, the top-mentioned favourably-regarded companies were

¹ 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). For more information, visit www.haddock-research.com/segmentation

² Conducted as part of the Environmental Choices 2008 study, http://www.haddock-research.com/public_opinion_monitor

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Toyota, GE, Hydro-Quebec and Cascades – the support for these last 2 companies is concentrated in Quebec. In England, Marks & Spencer and the Co-Op are the most widely well-regarded such companies, as are GE, Toyota and Honda in the US.

In contrast, there is much greater consensus when it comes to disapproval. For each of the three countries surveyed, the most mentioned disapproved of company for its actions and stance on climate change was Esso / Exxon – mentioned by 2.8% of Canadians, 0.9% of English people, and 2.3% of Americans. Amongst those most concerned about climate change, *Climate Citizens*, the proportions are higher at 3.9% (Canada), 2.2% (England) and 6.2% (US) respectively.

In Canada, a range of other oil companies are also disapproved of – Shell (by 2.5% of all Canadians), PetroCanada (by 0.9%), Ultramar (by 0.5%), Imperial Oil (by 0.5%) and BP (by 0.3%).

Netting all oil companies together, we can see that in each country, 'Big Oil' is the most widely disapproved of industry sector when it comes to climate change. Big Oil is particularly disapproved of in Canada where 8.1% of Canadians (and 12.6% from Quebec) named an oil company as a company they disapproved of for its stance/actions on climate change. This compares with 2.3% of English people and 4.7% of Americans. Amongst *Climate Citizens*, the proportions are higher on this issue - 13.3% of Canadian Climate Citizens, 4.7% of English Climate Citizens and 11.1% of American Climate Citizens disapprove of at least one oil company for its stance/actions on climate change.

Further information on this topic can also be found at:

www.haddock-research.com/environmental_choices/EC2008_3g_Offsets_and_Business

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

For enquiries, please contact Peter Winters, President, Haddock Research & Branding, Inc. peter.winters@haddock-research.com. This Environmental Choices survey is entirely self-funded and more details, along with free summaries of the results, are available from our website³. The next part of this press release provides a discussion about the tensions in Canadian society over Big Oil.

Any comments are solely the responsibility of Haddock Research, and we not being endorsed by third parties. In the final section of this document are charts which provide supporting evidence for this press release.

³ Visit the Free Reports section of www.haddock-research.com; and registration is required to download the free reports. More detailed results are available in the published reports section.

The tensions in Canadian society over Big Oil and climate change

Internationally, oil companies and especially Esso / Exxon, often get a 'bad press' when it comes to their actions on climate change. It is worth noting that oil companies are consumer brands, and hence relevant to the public in a way which coal companies are not. In England, Esso has received front-page publicity when the Royal Society⁴, and Bob Ward⁶ in particular, called for Esso to stop funding climate sceptic lobbying activity. In the US, the Rockefeller family has tried to organize Exxon shareholders to force the company to act more responsibly on climate change⁷. Also, given the power of the courts in the US, environmental lawyers have raised the prospect of litigation against companies which are 'climate change laggards'⁸.

Yet, this survey shows that the greatest swell of public opinion against Big Oil is in Canada. There is tension in Canadian society on this issue since Canadians tend to care strongly about climate change⁹, whilst Canada is doing very badly in meeting its climate change commitments, particularly due to its development of the tar sands¹⁰. This tension looks set to increase with public relations campaigns¹¹, international pressure¹² and ongoing debate focusing on this issue. Within Canada, a number of people and organizations are leading the debate – and brief profiles are described in next section. Each of these people and organizations is very concerned about the oil and climate change challenges we face, and the need for radical change.

Jeffery Simpson is a leading Canadian journalist who frequently comments on climate change and Canadian politics in the Globe and Mail. Along with Mark Jaccard and Nic Rivers he is the author of a book, published in 2007, called "Hot air: Meeting Canada's Climate Change Challenge". This book describes the ineffective policies that have so far been adopted in Canada, the difficulties of getting the federal and provincial governments to work effectively together, and the requirement that policies 'must constrain by regulation or financial penalty the free dumping of GHGs into the atmosphere' (p.204).

⁴ 'Royal Society tells Exxon: stop funding climate change denial' Guardian, September 20, 2006

<http://www.guardian.co.uk/environment/2006/sep/20/oilandpetrol.business>

⁵ 'Why ExxonMobil must be taken to task over climate denial funding' Guardian, July 1, 2009

<http://www.guardian.co.uk/environment/cif-green/2009/jul/01/bob-ward-exxon-mobil-climate>

⁶ Bob Ward, used to work at the Royal Society as a Senior Manager, Policy Communications (his letter to Esso of Sep 4, 2006 is available here - <http://royalsociety.org/displaypagedoc.asp?id=23780>), and is now of Grantham Research Institute think tank, working alongside where the influential economist Sir Nicholas Stern - <http://www.lse.ac.uk/collections/granthamInstitute/whoswho.htm>

⁷ 'Exxon facing shareholder revolt over approach to climate change' Guardian, May 19, 2008

<http://www.guardian.co.uk/business/2008/may/19/exxonmobil.oil>

⁸ Salzman, James and Hunter, David (2007) Negligence in the Air: The Duty of Care in Climate Change Litigation. University of Pennsylvania Law Review, 156:pp. 101-154. <http://eprints.law.duke.edu/archive/00001624/>

⁹ Our Environmental Choices 2008 survey results indicate that Canadians are particularly concerned about climate change. From this study, 41% of Canadians were classified as *Climate Citizens*, compared to 31% of the English and 28% of Americans. Another survey, conducted in 2007 indicated that Canadians were the most willing to make personal lifestyle choices from amongst 19 countries surveyed (ESOMAR 2008 conference paper, The Impact of Climate Change on Business, p.384).

¹⁰ See page 120 of Human Development Report 2007/2008, Fighting climate change: Human solidarity in a divided world

<http://hdr.undp.org/en/reports/global/hdr2007-2008/>; and also the WWF/Allianz G8 scorecard (pdf)

http://assets.panda.org/downloads/q8_scorecards_report.pdf (flash) http://www.knowledge.allianz.com/scorecards_2009 &

http://knowledge.allianz.com/en/globalissues/climate_change/top_climate_stories/q8_climatescorecards_2009_canada.pdf

¹¹ For example, Canada's oil sands, <http://www.canadasoilsands.ca/en/> & the Canadian Society of Petroleum Engineers communicates scepticism about climate change to its members, <http://www.cspg.org/publications/reservoir/reservoir-archive-2009.cfm>

¹² 'Oil Sands under attack' Globe and Mail, September 14, 2009 <http://www.theglobeandmail.com/report-on-business/oil-sands-under-attack-on-environment/article1286239/>

William Marsden is a journalist with the Montreal Gazette and author of a book, published in 2007, called *'Stupid to the Last Drop: How Alberta is bringing environmental Armageddon to Canada (and doesn't seem to care)'*. As the name suggests, this book is extremely critical of the environmental impact of the tar sands development. This book powerfully challenges some of Big Oil's PR, such as the credibility of one of Shell's 2007/2008 TV campaigns¹³ which communicates *'that Shell is getting advice from the Natives on how to restore the land. This begs the obvious question: what do Natives know about restoring the land? They'll teach you how to gut a moose, but they don't know how to restore the land for the simple reason that they've never destroyed it.'* (p.169).

Thomas Homer-Dixon is a writer who focuses on how people can be incentivized to act in a green fashion¹⁴. In 2009 he produced a book called *'Carbon Shift'*, and in the introduction he addresses the daunting challenges of meeting future energy needs without wrecking the planet. He brings together a range of experts who have rather different viewpoints, but a common concern that *'we need to change how we see the world and how we act'*. (It is interesting to read different opinions about fossil fuel supplies, but I confess I am now personally rather unsure about the near-term threat of 'peak oil'. It reminds me of the man who got a watch so that he could know the time; yet then his wife got him a second watch and now he is never quite sure.)

Peter Tertzakian is Chief Energy Economist of ARC Financial Corporation and, in 2009, wrote a book called *'The End of Energy Obesity'*. This book is extremely easy to read with many profound insights about the nature of energy markets, and how we should conceptualize the energy challenge we face. It is ultimately quite an optimistic book, and it talks about the benefits of reducing the amount of energy we consume, and how we need to have a holistic view of individual's energy consumption to avoid the 'rebound effect' of Jevons Paradox. It also argues that society should mainly focus on the way that energy is used as a way of controlling carbon emissions.

Pembina Institute, with Marlo Reynolds as Executive Director and Dan Woynillowicz as spokesman, is a leading Canadian think-tank which scrutinizes the sustainability of the oil sands, producing such documents as *'Oil Sands Myths'*¹⁵. Our Environmental Choices 2008 study indicated that 3.6% of Canadians are aware that Pembina is active on working on climate change (0.9% are positive about its work; 0.3% are negative).

Greenpeace runs a 'stop the tar sands' campaign¹⁶ and in September 2009, released a report called *'Dirty Oil: How the tar sands are fueling the global climate crisis'*¹⁷. Mike Hudema, is a well known climate campaigner with Greenpeace. Our study indicates that 53.0% of Canadians are aware that Greenpeace is active on working on climate change (26.2% are positive about its work; 9.9% are negative).

¹³ Shell, Grains of Sands advertising, 2008

¹⁴ For example, 'The enticement of green carrots' August 9, 2009, http://www.homerdixon.com/download/enticements_of_green_carrots.pdf

¹⁵ Pembina Institute, <http://www.oilsandswatch.org/oilsandsmyths>

¹⁶ http://www.greenpeace.org/canada/en/recent/stop_the_tar_sands

¹⁷ Dirty Oil: How the tar sands are fueling the global climate crisis, Greenpeace, September 14, 2009, http://www.greenpeace.org/canada/en/campaigns/tarsands/resources/tar_sands_report and for a blog review, see <http://priceofoil.org/2009/09/15/canada-the-climate-change-bully/>

David Suzuki Foundation, with David Suzuki as its inspiration is committed to bringing climate change to the attention of the Canadian public¹⁸, including the development of the tar sands¹⁹. Key personnel are Peter Robinson, the Foundation's CEO; Morag Carter, who leads the climate change team, Dan Maceluch in charge of communications, and Dale Marshall who is a policy analyst with the David Suzuki Climate Change Program. Recently, Dale Marshall stated that *'If any government in Canada is not interested in reigning in emissions from the tar sands, it will be next to impossible to do anything about climate change, and that's the problem'*.²⁰

Our Environmental Choices 2008 study shows how well known the David Suzuki Foundation is (and how inspirational David Suzuki personally is). This survey indicated that 53.1% of Canadians are aware that the David Suzuki Foundation is active on working on climate change (37.0% are positive about its work; 4.6% are negative).

Friends of the Earth Canada has a more general commitment to stopping global warming²¹. Our study indicates that 21.1% of Canadians are aware that Friends of the Earth is active on working on climate change (7.7% are positive about its work; 0.9% are negative).

WWF-CA also has a general commitment to fighting climate change, such as getting corporate leaders to support the Copenhagen Communiqué²². Our study indicates that 24.4% of Canadians are aware that WWF-CA is active on working on climate change (11.9% are positive about its work; 0.8% are negative).

Sierra Club of Canada is also active in challenging tar sands development²³. Our study indicates that 16.3% of Canadians are aware that the Sierra Club is active on working on climate change (5.6% are positive about its work; 2.3% are negative).

Équiterre is an environmental organization which tends to organize campaigns relevant to Quebec, and includes campaigns directed against tar sands infrastructure development in the province²⁴. (We do not have public recognition information for this organization since we did not include Équiterre in the pre-coded list of organizations for these questions.)

From our Environmental Choices 2008 survey, it is possible to build a detailed profile of those who are aware of each organization (for which we have information), as well as their supporters and detractors. This profile can include people's demographics, their passions and values, their decision-making responsibilities, their networking activity, their relationship with climate change, and other factors relevant to their circumstances.

¹⁸ http://www.davidsuzuki.org/climate_change/

¹⁹ 'Fueling the crisis' David Suzuki Foundation, 2001, http://www.davidsuzuki.org/Publications/Fueling_the_Climate_Crisis.asp

²⁰ The Hill Times, September 14 2009, <http://www.silobreaker.com/canada-has-tremendous-challenge-ahead-on-climate-change-experts-5-2262597548298469387>

²¹ See <http://www.foecanada.org/index.php?option=content&task=view&id=330&Itemid=135>

²² See <http://wwf.ca/newsroom/24461>

²³ See www.tarsandsstimeout.ca, and (pdf) <http://www.sierraclub.ca/national/programs/atmosphere-energy/energy-onslaught/tar-sands-action-guide.pdf>

²⁴ Equiterre 'The battle against the Trailbreaker project' <http://equiterre.info/site/rapportannuel/en/climate#trailbreaker>

Companies disapproved of for climate change stance

Analysis of up to 5 *spontaneous* mentions allowed for each respondent to an open-ended question

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| Top-mentioned disapproved companies | All respondents (n=1060) |
|-------------------------------------|--------------------------|
| Esso / Exxon (Mobil) / Mobil Oil | 2.8% |
| Shell / Royal Dutch Shell | 2.5% |
| GM / General Motors | 1.8% |
| Ford | 1.5% |
| Alcan / Rio Tinto | 1.5% |
| Chrysler | 0.9% |
| Petro Canada | 0.9% |
| US Government / Bush / Cheney | 0.9% |
| Greenpeace | 0.8% |
| Alberta government / oil sands | 0.8% |
| McDonalds | 0.7% |
| Walmart | 0.5% |
| Hummer / Humvee | 0.5% |
| Ultramar | 0.5% |
| Imperial Oil | 0.5% |
| Halliburton | 0.4% |
| BP / British Petroleum | 0.3% |

81.5% of Canadian respondents did not mention any companies
(mean # of mentions = 0.32)

Source: Q. 34b 'And also, very briefly, are there any companies you disapprove of for their stance and actions regarding Climate Change?' Max. 5 companies (fieldwork: 25 Sep to 3 Oct 2008)

Base: All Canadians respondents, 1060
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Companies disapproved of for climate change stance; net analysis by industry sector

Analysis of up to 5 *spontaneous* mentions allowed for each respondent to an open-ended question

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| Sector of disapproved companies | All respondents (n=1060) |
|------------------------------------|--------------------------|
| Oil Industry (inc gas extraction) | 8.1% |
| Car industry | 4.9% |
| Government/Politicians | 2.3% |
| Heavy Industry, Mining & Forestry | 2.1% |
| Other company types | 1.6% |
| Fast Food | 1.3% |
| Media/Celebrities/NGOs | 1.2% |
| Energy Industry (not oil or coal) | 0.8% |
| All (large) companies/corporations | 0.7% |
| Supermarkets | 0.5% |
| Airline industry | 0.2% |
| Coal Industry | 0.1% |

81.5% of Canadian respondents did not mention any companies
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Companies disapproved of for climate change stance; net analysis **by industry sector – by segment**

Analysis of up to 5 *spontaneous* mentions allowed for each respondent to an open-ended question

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| Sector of disapproved companies | Climate Citizens (n=436) | Mild Greens (n=388) | Sceptics & Uninvolved (n=249) |
|------------------------------------|--------------------------|---------------------|-------------------------------|
| Oil Industry (inc gas extraction) | 13.3% | 6.2% | 2.0% |
| Car industry | 6.0% | 5.3% | 1.6% |
| Government/Politicians | 3.7% | 2.1% | 0.0% |
| Heavy Industry, Mining & Forestry | 3.2% | 1.5% | 1.2% |
| Other company types | 3.0% | 1.2% | - |
| Fast Food | 2.1% | 1.5% | - |
| Media/Celebrities/NGOs | 0.7% | 1.2% | 1.6% |
| Energy Industry (not oil or coal) | 1.1% | 1.2% | - |
| All (large) companies/corporations | 0.9% | 0.6% | 0.4% |
| Supermarkets | 0.9% | 0.3% | - |
| Airline industry | 0.5% | - | - |
| Coal Industry | 0.2% | - | - |

73.2% of Climate Citizens did not mention any companies
(Mean # of mentions – 0.48)

83.4% of Mild Greens did not mention any companies
(Mean # of mentions – 0.30)

94.0% of Sceptics & Uninvolveds did not mention any companies
(Mean # of mentions – 0.08)

Source: Q. 34b 'And also, very briefly, are there any companies you disapprove of for their stance and actions regarding Climate Change?' Max. 5 companies (fieldwork: 25 Sep to 3 Oct 2008)

Base: Canadian respondents who are either Climate Citizens, Mild Greens or Sceptics & Uninvolved, n=1023
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Companies disapproved of for climate change stance; net  analysis by industry sector – **by region**
 Analysis of up to 5 *spontaneous* mentions allowed for each respondent

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| Sector of disapproved companies | Alberta (n=83) | Atlantic Canada (n=88) | British Columbia (n=149) | Manitoba (n=40) | Ontario (n=398) | Quebec (n=269) | Saskatchewan (n=33) |
|--|------------------------|------------------------------|--------------------------------|------------------------|------------------------|------------------------|------------------------|
| Oil Industry (inc gas extraction) | 7.2% | 11.4% | 7.4% | 7.5% | 5.3% | 12.6% | 3.0% |
| Car industry | 1.2% | 3.4% | 4.7% | 7.5% | 5.5% | 5.2% | 6.1% |
| Government/Politicians | 6.0% | 3.4% | 0.7% | 5.0% | 2.0% | 1.5% | 3.0% |
| Heavy Industry, Mining & Forestry | - | 1.1% | 0.7% | - | 1.0% | 5.6% | 3.0% |
| Other company types | 1.2% | 2.3% | 2.7% | - | 1.0% | 2.2% | - |
| Fast Food | - | - | 4.0% | 2.5% | 0.8% | 1.5% | - |
| Media/Celebrities/NGOs | 3.6% | - | 1.3% | 2.5% | 1.0% | 1.1% | - |
| Energy Industry (not oil or coal) | - | 1.1% | 1.3% | - | 0.8% | 1.1% | - |
| All (large) companies/corporations | 1.2% | 2.3% | - | - | 0.8% | 0.4% | - |
| Supermarkets | 1.2% | - | 1.3% | 2.5% | 0.3% | - | - |
| Airline industry | - | - | - | - | 0.3% | 0.4% | - |
| Coal Industry | - | - | - | - | - | 0.4% | - |
| NO COMPANIES MENTIONED (Mean # of companies mentioned) | 80.7% (0.31) | 81.8% (0.30) | 83.2% (0.34) | 82.5% (0.43) | 84.7% (0.24) | 75.1% (0.45) | 87.9% (0.18) |

Source: Q. 34b 'And also, very briefly, are there any companies you disapprove of for their stance and actions regarding Climate Change?' Max. 5 companies (fieldwork: 25 Sep to 3 Oct 2008)

Base: All Canadian respondents, 1060
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Companies disapproved of for climate change stance; net analysis by industry sector – key companies



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Analysis of up to 5 *spontaneous* mentions allowed for each respondent

| Sub-group | Oil Industry | | | | Car Industry | | | Miscellaneous | | |
|-------------------------------|--------------|-------|--------------|-------------------|----------------|------|----------|-------------------|-------------------|------------|
| | Exxon Mobil | Shell | Petro Canada | Alberta Oil Sands | General Motors | Ford | Chrysler | Alean / Rio Tinto | Bush, US Govern't | Greenpeace |
| All respondents (n=1060) | 2.8% | 2.5% | 0.9% | 0.8% | 1.8% | 1.5% | 0.9% | 1.5% | 0.9% | 0.8% |
| Climate Citizens (n=435) | 3.9% | 3.2% | 1.6% | 1.6% | 2.8% | 1.6% | 1.1% | 2.1% | 1.4% | 0.2% |
| Mild Greens (n=338) | 3.3% | 3.0% | 0.9% | 0.6% | 1.5% | 2.1% | 1.2% | 1.5% | 1.2% | 0.9% |
| Sceptics / Uninvolved (n=249) | 0.4% | 0.4% | - | - | 0.4% | 0.4% | 0.4% | 0.8% | - | 1.6% |
| Alberta (n=83) | 2.4% | 1.2% | - | 4.8% | - | - | - | - | 2.4% | 2.4% |
| Atlantic Canada (n=88) | 3.4% | 2.3% | 1.1% | 2.3% | - | 1.1% | 1.1% | - | 1.1% | - |
| British Columbia (n=149) | 2.7% | 3.4% | 0.7% | - | 0.7% | 2.0% | - | - | 0.7% | 1.3% |
| Manitoba (n=40) | - | 7.5% | - | - | 5.0% | 5.0% | 2.5% | - | 2.5% | 2.5% |
| Ontario (n=398) | 1.5% | 0.8% | 0.3% | - | 2.5% | 1.8% | 1.5% | - | 1.0% | 0.3% |
| Quebec (n=268) | 5.6% | 4.5% | 2.6% | 0.7% | 1.9% | 1.1% | 0.7% | 5.6% | 0.4% | 1.1% |
| Saskatchewan (n=33) | - | - | - | 3.0% | 3.0% | - | - | 3.0% | - | - |

Source: Q. 34b 'And also, very briefly, are there any companies you disapprove of for their stance and actions regarding Climate Change?' Max. 5 companies (fieldwork: 25 Sep to 3 Oct 2008)

Base: All Canadian respondents, 1060
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Influence of organisations on thinking about climate change (1 of 3)



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3.b Organisations & Marketing Campaigns

| Organisation | Active in discussing climate change | Effective in shaping thoughts / understanding | Generally wrong-thinking and/or annoying |
|--|-------------------------------------|---|--|
| David Suzuki Foundation | 53.1% | 37.0% | 4.6% |
| Greenpeace | 53.0% | 26.2% | 9.9% |
| National Geographic | 40.9% | 23.7% | 1.0% |
| WWF-CA | 24.4% | 11.9% | 0.8% |
| United Nations | 22.1% | 7.0% | 1.7% |
| Friends of the Earth | 21.1% | 7.7% | 0.9% |
| NASA | 17.2% | 6.6% | 0.9% |
| Sierra Club | 16.3% | 5.6% | 2.3% |
| WWF-USA | 15.7% | 4.7% | 0.6% |
| BBC | 13.8% | 6.7% | 0.8% |
| Zerofootprint.net | 9.8% | 3.8% | 0.4% |
| Clinton Foundation | 9.5% | 2.8% | 0.2% |
| WWF-UK | 8.8% | 3.2% | 0.4% |
| Alliance for Climate Protection | 8.6% | 1.6% | 0.5% |
| Global Climate Campaign | 7.4% | 2.2% | 0.1% |
| U.S. National Oceanic and Atmospheric Admin. | 7.2% | 1.7% | 0.3% |

Source: Q32, The Environmental Choices syndicated study, 2008; Organisations known to be active in climate change; and that are considered to be 'effective in shaping your thoughts/understanding' or 'generally wrong-thinking and/or annoying' regarding climate change (fieldwork: 25 Sep to 3 Oct 2008)

Base: All Canadian respondents, n=1060

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Influence of organisations on thinking about climate change (2 of 3)



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3.b Organisations & Marketing Campaigns

| Organisation | Active in discussing climate change | Effective in shaping thoughts / understanding | Generally wrong-thinking and/or annoying |
|--------------------------------------|-------------------------------------|---|--|
| Earthlab.com | 6.3% | 2.3% | 0.3% |
| Natural Environment Research Council | 5.9% | 1.5% | 0.3% |
| Climateproject.com | 5.4% | 1.3% | 0.1% |
| U.S. Climate Action Partnership | 5.0% | 0.8% | 0.3% |
| Climate Group | 4.9% | 1.1% | 0.2% |
| Energy Savings Trust | 4.9% | 1.3% | 0.2% |
| Carbon Disclosure Project | 4.7% | 0.8% | 0.1% |
| Carbon Trust | 4.6% | 1.1% | 0.3% |
| Real Climate | 4.4% | 1.1% | 0.1% |
| Stop Climate Chaos | 4.3% | 1.2% | 0.1% |
| Worldwatch Institute | 4.3% | 1.1% | 0.3% |
| Heritage Foundation | 4.1% | 1.2% | 0.5% |
| The Times | 3.7% | 1.1% | 0.5% |
| Pembina Institute | 3.6% | 0.9% | 0.3% |
| Royal Society | 2.8% | 1.1% | 0.0% |
| The Guardian | 2.6% | 0.8% | 0.4% |

Source: Q32, The Environmental Choices syndicated study, 2008; Organisations known to be active in climate change; and that are considered to be 'effective in shaping your thoughts/understanding' or 'generally wrong-thinking and/or annoying' regarding climate change (fieldwork: 25 Sep to 3 Oct 2008)

Base: All Canadian respondents, n=1060

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Influence of organisations on thinking about climate change (3 of 3)



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3.b Organisations & Marketing Campaigns

| Organisation | Active in discussing climate change | Effective in shaping thoughts / understanding | Generally wrong-thinking and/or annoying |
|---|-------------------------------------|---|--|
| Cato Institute | 2.4% | 0.6% | 0.3% |
| Potsdam Institute for Climate Impact Research | 2.3% | 0.6% | 0.0% |
| Pew Centre on Global Climate Change | 2.1% | 0.5% | 0.0% |
| Institute for Public Policy Research | 2.0% | 0.5% | 0.1% |
| The Independent | 1.3% | 0.4% | 0.2% |
| The Telegraph | 1.3% | 0.3% | 0.3% |
| Hadley Centre | 0.8% | 0.4% | 0.1% |
| New Economics Foundation | 0.8% | 0.1% | 0.1% |
| Pacte de Generations/ Generations Pact | 0.8% | 0.3% | 0.0% |
| CBI | 0.6% | 0.4% | 0.1% |
| IISD | 0.6% | 0.3% | 0.2% |
| Tyndall Centre | 0.4% | 0.2% | 0.0% |
| Competitive Enterprise Institute | 0.2% | 0.2% | 0.2% |
| TCS (Tech Central Station) | 0.2% | 0.1% | 0.0% |
| None of them | 24.6% | 42.4% | 83.3% |

Source: Q32, The Environmental Choices syndicated study, 2008; Organisations known to be active in climate change; and that are considered to be 'effective in shaping your thoughts/understanding' or 'generally wrong-thinking and/or annoying' regarding climate change (fieldwork: 25 Sep to 3 Oct 2008)

Base: All Canadian respondents, n=1060

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Internationally, society is very divided about climate change

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3.e Flying & Telepresence

- interim edition

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

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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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