



Travelling light:

Why the UK's biggest companies are seeking alternatives to flying

ONE PLANET
FUTURE



**ONE PLANET
FUTURE**

If everyone in the world consumed natural resources and generated carbon dioxide at the rate we do in the UK, we would need three planets to support us. The impacts - which include climate change, deforestation and biodiversity loss - are starting to affect us all.

WWF has a vision for a One Planet Future - a world in which people and nature thrive within their fair share of the Earth's natural resources. Our One Planet Future campaign supports individuals and businesses in reducing their footprint, while pressing governments and industry to make the changes needed for us all to lead a one planet lifestyle.

We have been born into a decisive period in human history. The choices we make today will make a world of difference to the people and species that will share this planet's future.

Find out what you can do,
visit wwf.org.uk/oneplanetfuture

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Critical Research is one of the UK's leading independent specialists in market research with an established reputation and proven track record in business-to-business research.

www.critical.co.uk





Key findings

89% of the FTSE 350 companies we surveyed expect they will want to fly less over the next 10 years

Business flights are expected to decline as from next year

85% of companies believe that videoconferencing has the potential to reduce their business flying

89% of companies believe that videoconferencing can improve their productivity

75% of companies believe the government should be encouraging investment in videoconferencing

Surveyed companies also want more government investment in high speed rail as **77%** of companies expect they will travel more by rail

Executive Summary

Why WWF-UK encourages greener business travel

WWF-UK's vision is of a world in which people and nature thrive within their fair share of the Earth's natural resources. WWF-UK's One Planet Future campaign uses our practical experience, knowledge and credibility to create long-term solutions that target the most carbon intensive areas of the UK's ecological footprint.

Personal mobility, consisting of all transport methods, is a major source of ecological impact, responsible for 26% of global carbon dioxide (CO₂) emissions.¹ Air travel is the transport sector with the second highest impact in Europe,² and is one of the fastest-growing contributors to climate change in the UK. Work-related travel is a major driver of aviation growth, representing 22% of total passenger trips and a higher proportion of airline revenue.³ With no sizeable technological improvements in sight to balance aviation growth, transformational change will be needed in order to achieve a sustainable mobility system.

Along with a host of scientific and environmental commentators, WWF-UK is calling for reductions in the UK's CO₂ emissions of at least 80% on 1990 levels by the year 2050. But if this cut is implemented, and aviation continues to grow unchecked, independent analysis suggests it could consume the UK's entire carbon allowance by 2050.⁴ Clearly, such a situation is untenable, and reducing the growth in aviation emissions is therefore a priority.

WWF-UK is committed to finding credible solutions to environmental problems, and to helping companies seek less carbon-intensive business and travel practices. In the case of air travel, which will remain a carbon-intensive activity for many years to come, this means the use of practical alternatives where they exist. Rail provides a good, low-carbon option for many shorter trips, but for longer journeys the best alternative to flying is to hold a 'virtual meeting' – harnessing modern videoconferencing technology to remove the need for travel.

We wanted to understand how seriously businesses are taking the need to reduce their carbon footprint from travel. In January 2008 WWF-UK commissioned the independent market research company, Critical Research, to undertake a survey of business travel practices among FTSE 350 companies across a balanced spread of manufacturing, service, finance and media sectors. The survey attracted a high level of interest and participation with 100 companies agreeing to be interviewed over a three-week period.

We hoped that there would be some interest in greener business travel. However, the results exceeded our expectations, with a clear majority of companies already taking action in this area. As shown in Critical Research's findings, some 62% of the UK's largest companies surveyed are already reducing their business travel footprint, with a further 24% developing plans to do so. And where large companies lead, smaller companies – and governments – will surely follow.

The growth in air travel is being facilitated in the UK by the physical expansion of airports, which both caters for and drives increased demand for flights. The economic benefits of giving businesses ever-greater access to air travel are routinely cited as a justification for this process. Transport Secretary Ruth Kelly has said that airport expansion is "vital" for the UK's international competitiveness and securing British jobs.⁵ As the UK government's air passenger forecasts assume virtually no price elasticity in demand for UK business flights,⁶ they predict a steadily-growing business market under all scenarios, and assume that capacity must be expanded to meet that demand or else substantial economic losses will follow. Yet the vast majority of FTSE 350 companies we surveyed say that they plan to reduce the amount they fly, while improving their productivity through greater use of videoconferencing and rail alternatives.

What emerges from our research is a picture of the economy somewhat different from the government's view: one of continued growth and strong competitiveness, certainly, but one where companies fly less. In this scenario, the case for airport expansion begins to evaporate.

¹ WWF. 2006. One Planet Business Global Evidence Base. WWF, Godalming.
² Eurostat (2007) 'Panorama of Transport' [online] website. Available from http://app.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-DA-07-001/EN/KS-DA-07-001-EN.PDF
³ Civil Aviation Authority. 2006 Air Passenger Survey. Civil Aviation Authority, London.
⁴ Cairns, S and Newson, C 1992. Predict and Decide. Aviation, climate change and UK policy. University of Oxford, Oxford.
⁵ Heathrow Airport Guide, 2007. Ruth Kelly Supports Heathrow expansion – but with emissions cap. [online] website. Available from www.heathrow-airport-uk.info/heathrow-airport-news-280907.htm. [Accessed 12 March 2008]
⁶ Department for Transport. 2007 UK Air Passenger Demand and CO₂ Forecasts. Defra, London.

Why greener travel is good for business

For many companies, business travel represents a significant percentage of their carbon footprint: often 50% or more for non-manufacturing companies. As the pressure grows on UK-listed companies from both regulators and investors to report their annual carbon emissions, it is no wonder that companies are starting to take a hard look at their current business travel practices. Many are finding that flying is the biggest travel challenge in environmental terms.

Greater carbon accountability is not the only reason why more companies are seeking to reduce their business travel, or switch to lower carbon alternatives. Higher oil prices have pushed up the cost of travel, especially fuel surcharges for air travel, at a time when the economy is slowing down and companies are therefore more cost conscious. Although there is an upfront cost to installing or upgrading videoconferencing systems, return on investment can come in a year or less for frequent-flyer companies, as they save on hotel, insurance and expenses bills as well as on airfares.

In addition to these direct cost savings, one could put a value on the hours that employees spend working instead of travelling, or on the more continuous work time offered by a train journey as opposed to the disjointed experience of a door-to-door journey by air. What is harder to measure precisely is the improvement in productivity that comes from an improved work-life balance, reduced jetlag, and increased collaborative working with colleagues in remote locations. Hard to measure, but not hard to grasp – 89% of the companies we surveyed believed that videoconferencing, if used well, could enhance the productivity of their organisations.

“89% of the companies we surveyed believed that videoconferencing, if used well, could enhance the productivity of their organisations.”

Latest videoconferencing technology reduces the need for flights

All forms of telecommunication have the potential to reduce physical travel and enhance collaborative working – from audio-conferencing through to web and videoconferencing. But the latest high-definition videoconferencing and telepresence technologies offer a hugely improved user experience over the poor-quality, difficult-to-use systems previously available. Crucially, they are able to replicate important human factors such as eye contact or the body language of participants. For the first time, virtual meetings are an attractive alternative to travelling for many types of meeting, from board meetings to project team updates, where the individuals already know each other and working relationships are well established.

Today's large companies are beginning to invest extensively in new generation videoconferencing facilities. But simply installing the system is not enough to guarantee a reduction in flying. It needs to be combined with a tailored business travel strategy, implemented throughout the organisation, which encourages staff to make greener travel choices or avoid travel altogether. It helps too, if the change is driven from the top. This is clearly understood by CEOs and board directors, who in two thirds of companies surveyed were leading the trend towards greener business travel and championing the use of videoconferencing and low-carbon alternatives in their organisations.

These strategies are starting to bear fruit. From next year, the UK's largest companies are saying that they expect to fly less, 3% less on average, with short haul flights cut by even more.

Videoconferencing will not replace all types of face-to-face meetings — for example, seeing new clients or going on site visits. But our research shows that companies are increasingly trying to reduce the number of meetings that involve flying, and over the longer term, the trend is even more pronounced: 89% of companies expect they will want to fly less over the next 10 years.

“89% of companies expect they will want to fly less over the next 10 years.”

Broader and deeper: the one in five challenge

Companies are already changing the way they do business, but WWF-UK believes that in order to avoid dangerous climate change and the social, environmental and economic impacts it will bring, that change needs to be accelerated. To this end, WWF-UK wishes to secure deeper commitments to reduce flying from a broader range of organisations.

As part of our One Planet Future campaign, we will be challenging UK companies to ‘cut one in five’ flights, which we believe is a realistic target with significant carbon savings. If all European companies were to cut their business travel by 20% and use video or audioconferencing instead, we would save 22 million tonnes of CO₂ each year,⁷ equivalent to taking one third of the UK’s cars off the road.

Of course we want to make it easier for businesses to achieve this target. That is why we will be calling on the government to put in place incentives to increase the uptake of videoconferencing technology, for example, through the Enhanced Capital Allowance scheme (supported by two thirds of companies surveyed). The government can also lead by example – especially as it was responsible for flying 300 million miles in 2007.⁸

WWF-UK will also be challenging videoconferencing manufacturers to ensure that their different systems can talk to each other, since increasing the number of possible connections increases the usefulness of any given unit. Interoperability is an important factor for businesses when considering whether to invest – three quarters of companies surveyed said that greater compatibility of systems would increase their use of videoconferencing in the future.

Finally, we will be working with manufacturers, network providers and the travel management industry to ensure that businesses understand the environmental benefits of replacing travel through videoconferencing, and that they receive due recognition of their achievements in reducing their business travel carbon footprint.

Decarbonising the global economy

Continued economic growth is a central aim of the UK government and governments around the world. Yet deep and rapid cuts in carbon emissions will be required if we are to avoid truly catastrophic climate change impacts. Decoupling economic growth from growth in carbon emissions is imperative, and the only sustainable growth strategy is a significantly dematerialised one.

At the same time, the world is becoming more interdependent, with an increasing need for global collaboration. Videoconferencing is a lifeline technology that meets both needs: it allows us to increase collaboration and output while reducing carbon emissions.

The Nobel Laureate Al Gore has voiced his support for the latest generation of videoconferencing as an innovative technology that can help to reduce global carbon emissions, and stressed its vital role in a globalised economy.⁹ He said: “People have been waiting for a new videoconferencing option to come along, to substitute for a much larger percentage of face-to-face meetings. I think a lot of businesses will find this very attractive and it is clearly one of the options that’s going to play a big role.”

By helping companies to travel light and collaborate more effectively, videoconferencing is truly a win-win solution to reducing the business carbon footprint and the need to fly – helping to cut aviation emissions painlessly and profitably. Twenty-first century business will operate in an increasingly carbon-constrained environment, and less air travel achieved through greater use of videoconferencing already looks like a key strategy for enabling continued growth and competitiveness.

“Three quarters of companies surveyed said that greater compatibility of systems would increase their use of videoconferencing in the future.”

⁷ Pamlin, D and Szomolanyi, K (2006) Saving the Climate @ the Speed of Light. WWF and Enso., Brussels..

⁸ Morris, N, 2008. ‘Jet-setting’ government clocked up 300 million air miles last year. [online] website. Available from www.independent.co.uk/news/uk/politics/jetsetting-government-clocked-up-300-million-air-miles-last-year-800206.html.

⁹ Cisco TelePresence (2008) Keynote panel discussion on Technology and Climate Change [online] website. Available from <http://www.cisco.com>



Background and Objectives

WWF-UK commissioned Critical Research, an independent market research company, to conduct a research survey among FTSE 350 companies, the leading businesses in the UK, in order to inform their policy and campaigning work.

The overall aim of the survey was to examine levels of business travel and the introduction of any green travel policies within major organisations.

The research objectives were defined as follows:

To assess the impact climate change has had and will have on how organisations conduct their business and whether they are actively reducing their carbon footprint;

To ascertain whether companies have a corporate policy which encourages 'green' business travel;

To determine the current and future level of business flights taken by these companies;

To evaluate use of and attitudes towards videoconferencing;

To measure whether any government initiatives would encourage green business travel.

WWF-UK proposed the objectives for the work which were then refined with Critical Research and incorporated into the survey design.



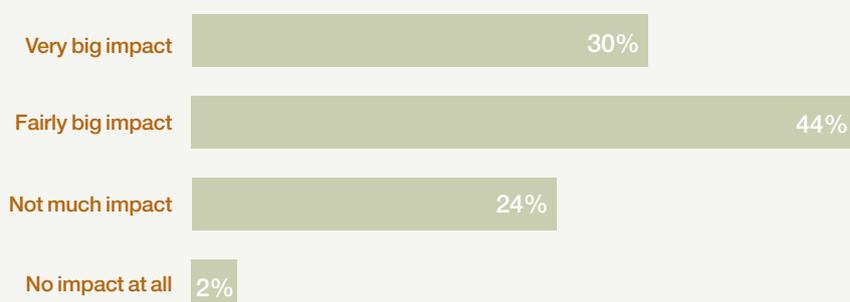
Main Findings of the Survey

1 Conducting Business

Impact on Business

Nearly three quarters of all respondents (74%) claimed that, to date, climate change and environmental debate has had a big impact (very / fairly) on the way their organisation conducts its business.

Impact climate change & environmental debate had on way organisation conducts business



Base: All respondents (100)

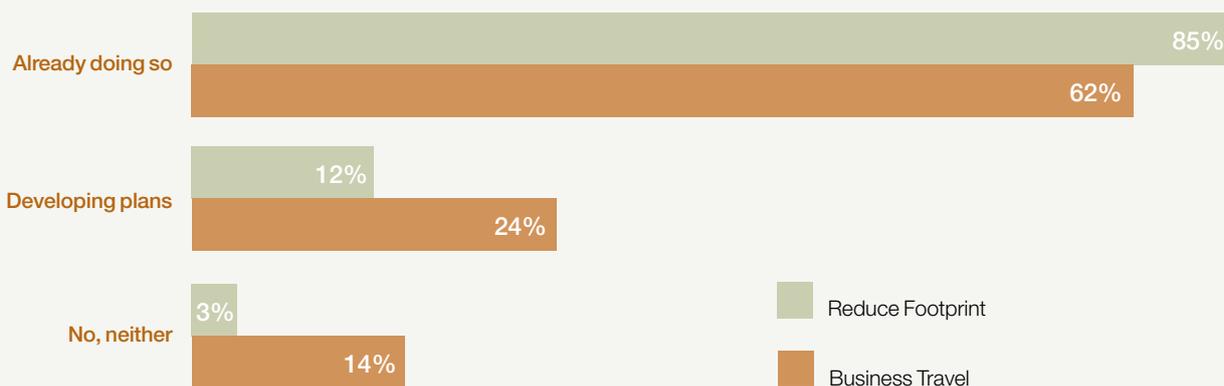
Virtually all respondents (98%) held the view there would be changes to the way they conduct business in the next ten years due to climate change.

Reducing Carbon Footprints and Business Travel

The vast majority (85%) of the sample said that their organisation was already reducing its carbon footprint, with a further 12% developing plans to do so.

When asked whether business travel was an area where their organisation was seeking to reduce its carbon footprint, 62% of respondents claimed that they were already doing so with a further 24% developing associated plans.

Organisations seeking to reduce carbon footprint – in general / in area of business travel

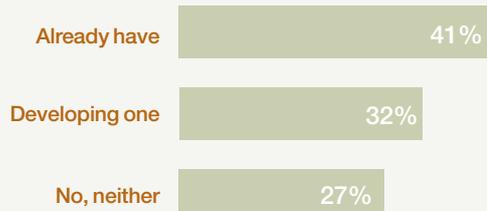


Base: All respondents (100)

Green Business Travel

Over 70% of respondents said that their company either had or was developing a corporate policy which encourages green business travel, i.e. use of lower carbon travel choices and alternatives.

Whether organisation has a corporate policy which encourages green business travel



Base: All respondents (100)

Respondents that either had or were developing a corporate policy encouraging green business travel were asked to comment on their policy and whether there were any specific targets or goals in place. A large number and variety of comments were made, the most frequent relating to:

- A greater use of audio / videoconference facilities
- Increasing use of trains / public transport
- Changing the company car fleet / choice of company cars (use of hybrids / smaller cars / cars with lower emissions etc.)
- Encouraging staff to car share / use cycles
- Reduced flying / number of flights taken by employees

Verbatim comments include:

"We have not set targets but we do have objectives. One of these involves the setting up of corporate videoconferencing pilot trials in order to reduce business miles. I am encouraging heads of department to do this. Another of my objectives involves cutting out a million miles from the 15 million miles we currently do."
(Media company)

"We try to use alternatives to flying. We conducted a travel survey at all of our sites... and have a system in place to track transport. We are launching a website so that all employees can see their individual impact, to help focus on travel reduction. We plan to have an overall 10% reduction in total carbon emissions by 2010 and a 2% absolute reduction in overall travel by 2009 on a 2005 base line. There are no specific destinations that the train must be taken to... however [employees] have to prove before travelling why they are flying rather than using the train."(Media company)

"We have a target to reduce air travel by 10% in 2008 vs 2007. Our objective is to optimise meetings both in terms of location and the number of people who need to attend. We have increased our use of videoconferencing and all offices now have it. We now plan to hold all conferences in the UK to reduce our global footprint."
(Manufacturer)

Those respondents with or intending to have a green travel policy were read out a number of different means of reducing their carbon footprint and asked to state those which, when looking ahead, they expected their travel policy to encourage.

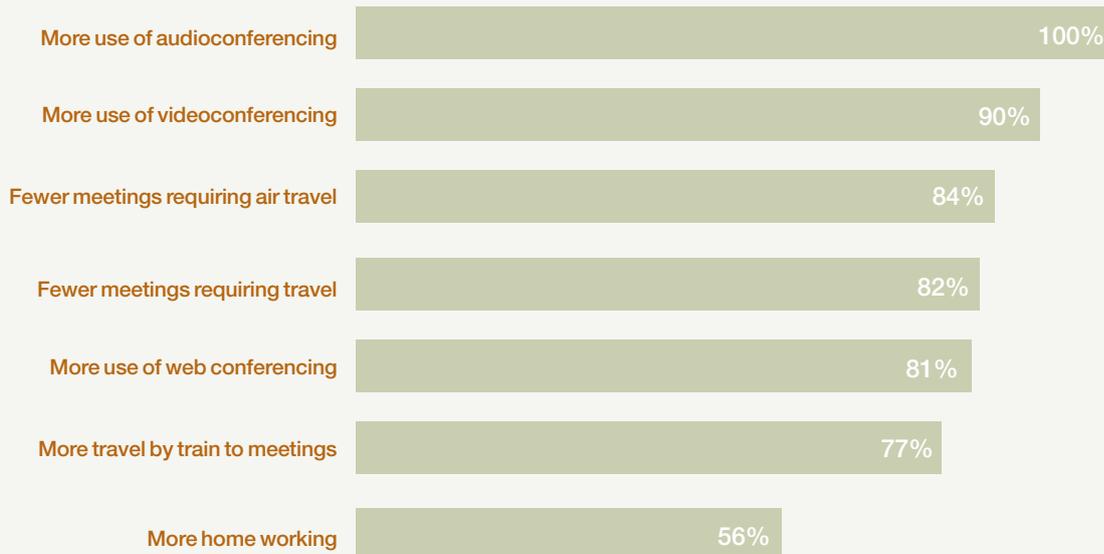
With the exception of home working, each of these means of reducing the business travel carbon footprint would be encouraged by over 75% of these respondents. As can be seen, both audio and videoconferencing were the most popular, stated by 100% and 90% respectively, with fewer meetings requiring air travel/travel in a secondary position. Perhaps not surprisingly 'home working' was the least popular option but even so was still mentioned by over 50% of these respondents (some 40% of the total sample). Within those organisations with or intending to have a green business travel policy it is Board members, and to a lesser extent the CEO, the Environmental or Climate Change Director, and the Corporate Social Responsibility (CSR) team, who seem to have been the main drivers in developing such a policy.

The participation of the CEO in the development of a green travel policy does seem to be important, with around two thirds of those respondents with or intending to have a green travel policy saying that their CEO was either 'very' or 'quite' involved.



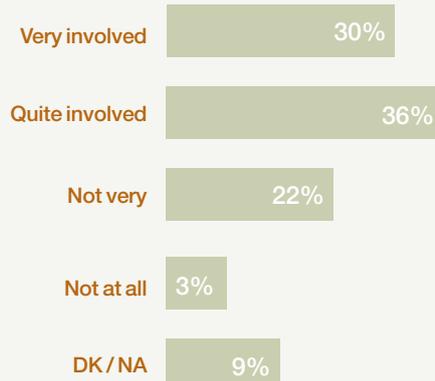
Courtesy of Virgin Trains

Green business travel policy expected to encourage



Base: Those respondents with or intending to have a green travel policy (73)

Involvement of CEO in the development of the green business travel policy



DK: Don't know
NA: Not applicable

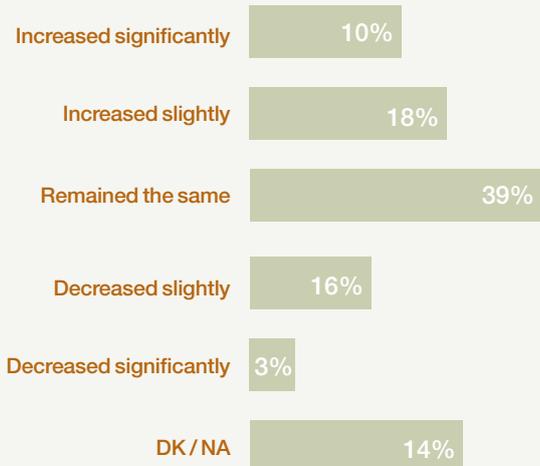
Base: Those respondents with or intending to have a green travel policy (73)

2 Business Flights

Level of flights over past year

Over the past year, 58% of businesses had reduced or stabilised their business flights while 28% had increased them.

Whether total number of flights taken over the past year has increased or decreased

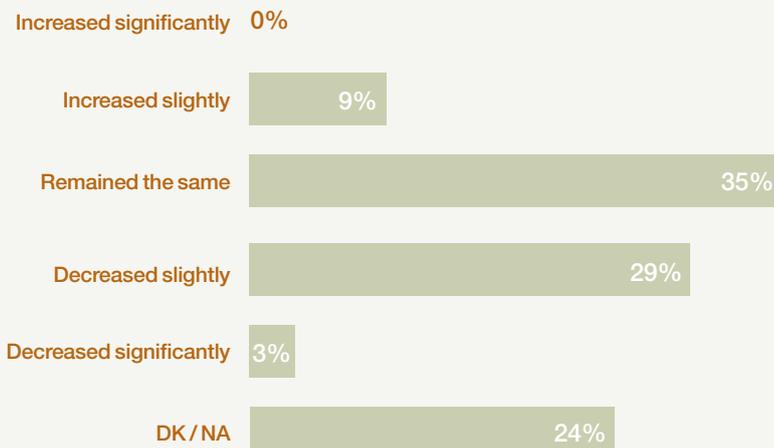


Base: All respondents (100)

Level of flights over next year

About a third of respondents (32%) expect business flights to be taken by their company to decrease over the next year. This compares with 9% expecting the number of flights to increase, albeit only slightly.

Whether total number of flights taken over the next year will increase or decrease



Base: All respondents (100)

When comparing results regarding the number of flights taken last year, and the number expected over the next year, it can be seen that there is a large shift in:

- Last year – the number of organisations with an increased number of flights (28) slightly exceeds those with a decreased number of flights (19)
- Next year – the number of organisations expecting to take a decreased number of flights (32) far exceeds those expecting to take an increased number of flights (9)

When asked to quantify, in percentage terms, the expected change in the number of flights to be taken in the next year, the resulting figures reveal a greater expected decline in short-haul than long-haul flights.

On average, organisations indicate they will take 3% fewer business flights over the next year (compared with the 4% increase they experienced over the past year).

Business Flights over past year

	Mean
Total number of flights	Up 4%
Short-haul flights	Up 3%
Long-haul flights	Up 2%

Business Flights over next year

	Mean
Total number of flights	Down 3%
Short-haul flights	Down 5%
Long-haul flights	Down 1%

When asked, spontaneously, to state the main reasons as to why their organisation might choose to fly less in the future, a variety of aspects relating to costs, technological advances, corporate policy, and business change were mentioned:

• Business costs (time/expense)	30%
• Greater use of video/tele-conferencing	26%
• Climate change policies	21%
• Changes in business/business need	20%
• Reduction in carbon emissions	12%

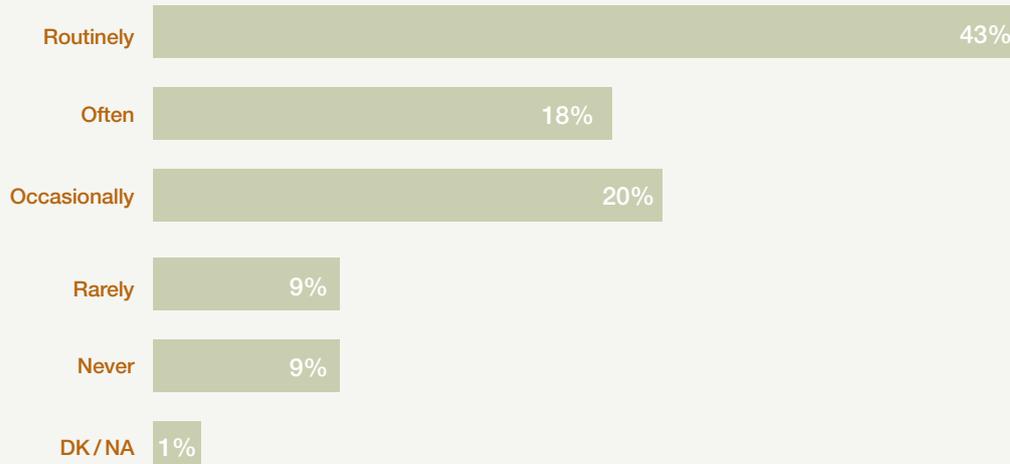


3 Use of videoconferencing

Current use and benefits

Over 60% of respondents frequently use videoconferencing, with a further 20% saying that they occasionally use it. In comparison less than 20% use it rarely or never.

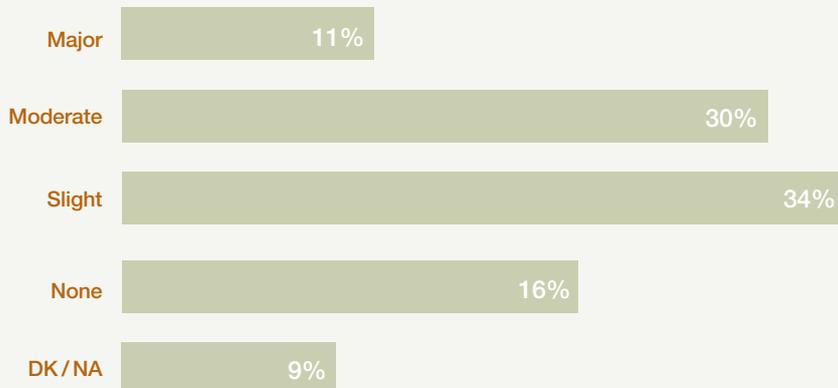
How frequently company currently uses videoconferencing



Base: All respondents (100)

The majority (75%) of respondents using videoconferencing think that it has already had at least some impact in reducing air travel. Some 11% of such respondents deem it to have had a major impact.

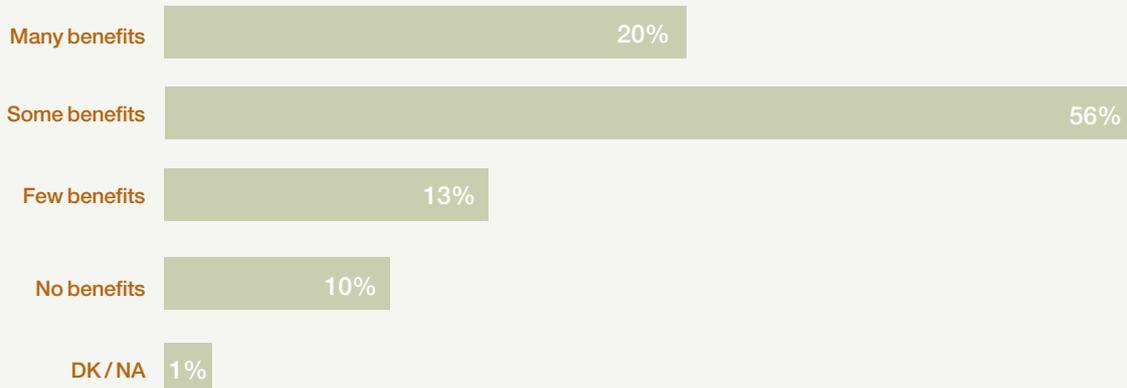
Impact the use of videoconferencing has had in reducing business flying



Base: All whose company ever use videoconferencing (90)

Nearly 90% of respondents do think that videoconferencing has brought benefits to their organisation, with one in five companies saying 'many'.

Level of benefits videoconferencing has brought to the organisation



Base: All whose company ever use videoconferencing (90)

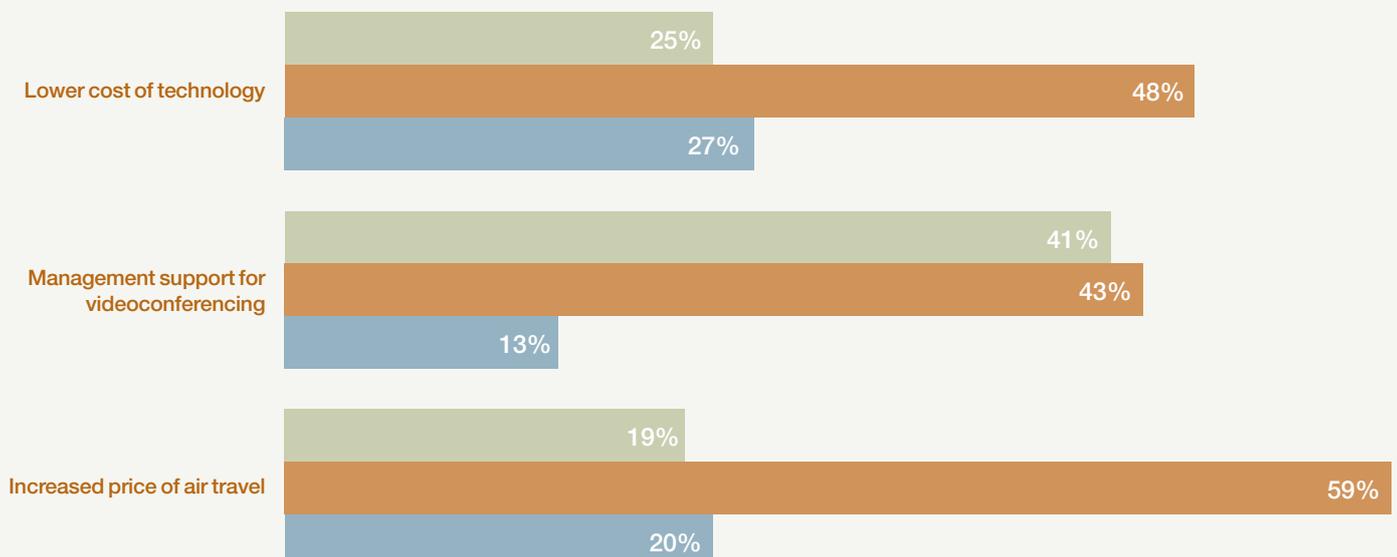
All those respondents not using videoconferencing either routinely or often were asked to express their interest in using videoconferencing in the future. Perhaps not surprisingly, all were interested in doing so.

Factors encouraging greater use of videoconferencing

Respondents were read out a number of factors which could affect the use of videoconferencing in the future and for each one asked to state the extent to which they thought it would increase use within their organisation.



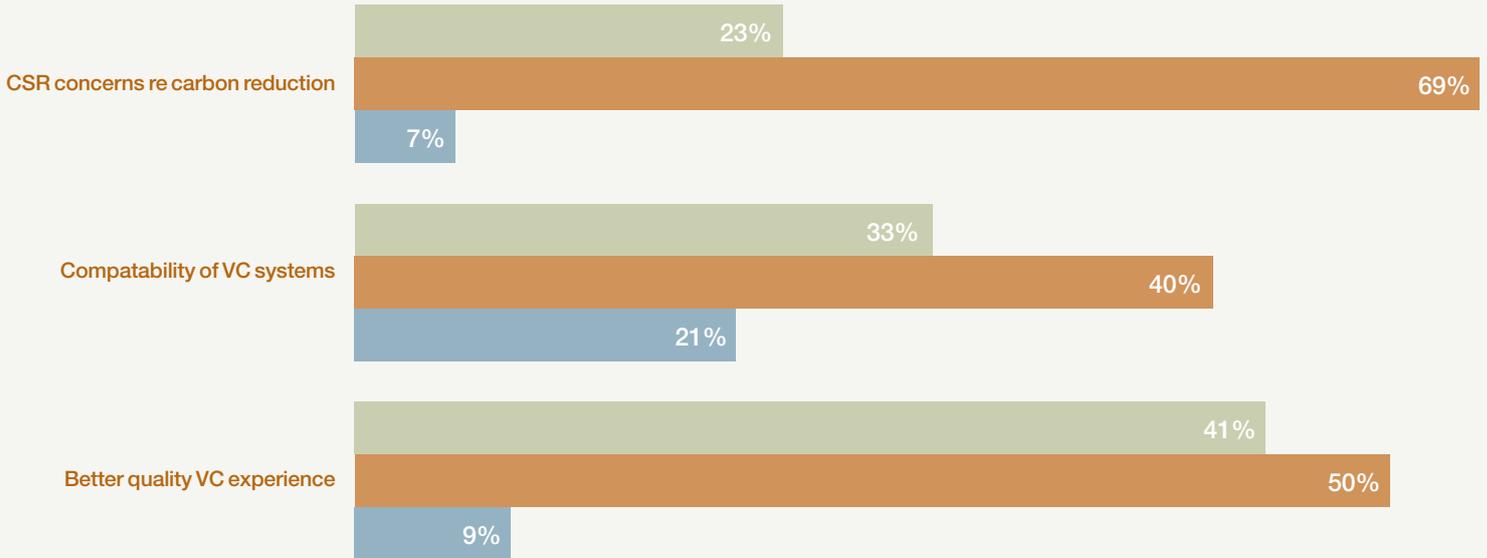
The extent factor might increase use of videoconferencing in the future



(Continued on page 16)

(Continued)

The extent factor might increase use of videoconferencing in the future



Base: All respondents (100)

- Great deal
- Somewhat
- Not at all

Of these six different factors it can be seen that an 'improved or better quality of videoconferencing experience' and, to a slightly lesser extent, 'greater CEO or senior management support for videoconferencing' were deemed to be the most likely to increase use in the future. 'Increased CSR concerns about carbon reduction' and 'greater compatibility of different videoconferencing systems' also feature strongly. Despite concerns about business costs as a reason for choosing to fly less in the future, the 'increased price of air travel' and 'lower cost of videoconferencing technology' were considered to have slightly less impact on the use of videoconferencing than the other factors, although they were still expected to have an impact by over 70% of respondents.

Logistics and usability issues were also mentioned, as shown in the following verbatims:

"The logistics of getting more videoconference rooms... at the moment we just don't have the room." (Finance company)

"Simplicity... it needs to be as easy to use as picking up a phone." (Media company)

"We need better connections and infrastructure in Africa and Asia, which limit our use of video conferencing." (Oil and gas company)

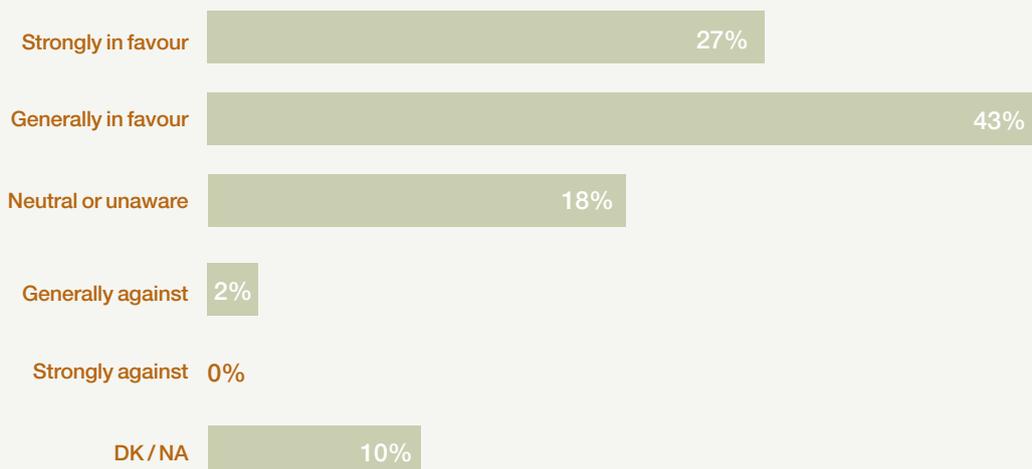
Opinion of the CEO

Respondents were asked to state whether they thought their CEO was in favour or against the use of videoconferencing.

70% of respondents claim their CEO is in favour of videoconferencing.

The main reasons given for thinking that their CEO was in favour of videoconferencing were 'reducing business costs (time/travel)' and 'reducing carbon emissions' which were mentioned by 31% and 20% of respondents respectively.

CEO's opinion of videoconferencing

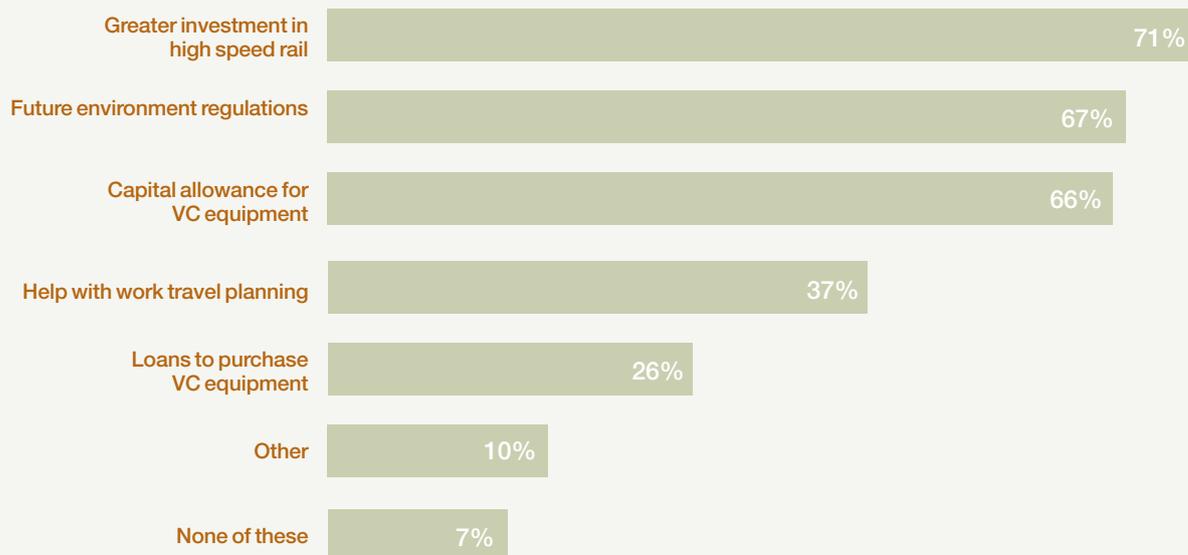


Base: All respondents (100)

4 Government initiatives

A number of initiatives that the government could introduce to assist companies in achieving greener business travel were read out and respondents were asked to state those which, in their opinion, would best help their organisation.

Initiatives that would best help achieve greener business travel



Base: All respondents (100)

The most popular government initiative would be 'greater investment in high speed rail infrastructure'.

'Greater certainty over future environmental regulations' and 'an enhanced capital allowance scheme for videoconferencing equipment' also feature strongly.

Conversely, the two initiatives 'more help with work travel planning' and 'loans to purchase appropriate videoconferencing equipment' were not deemed to be that helpful.

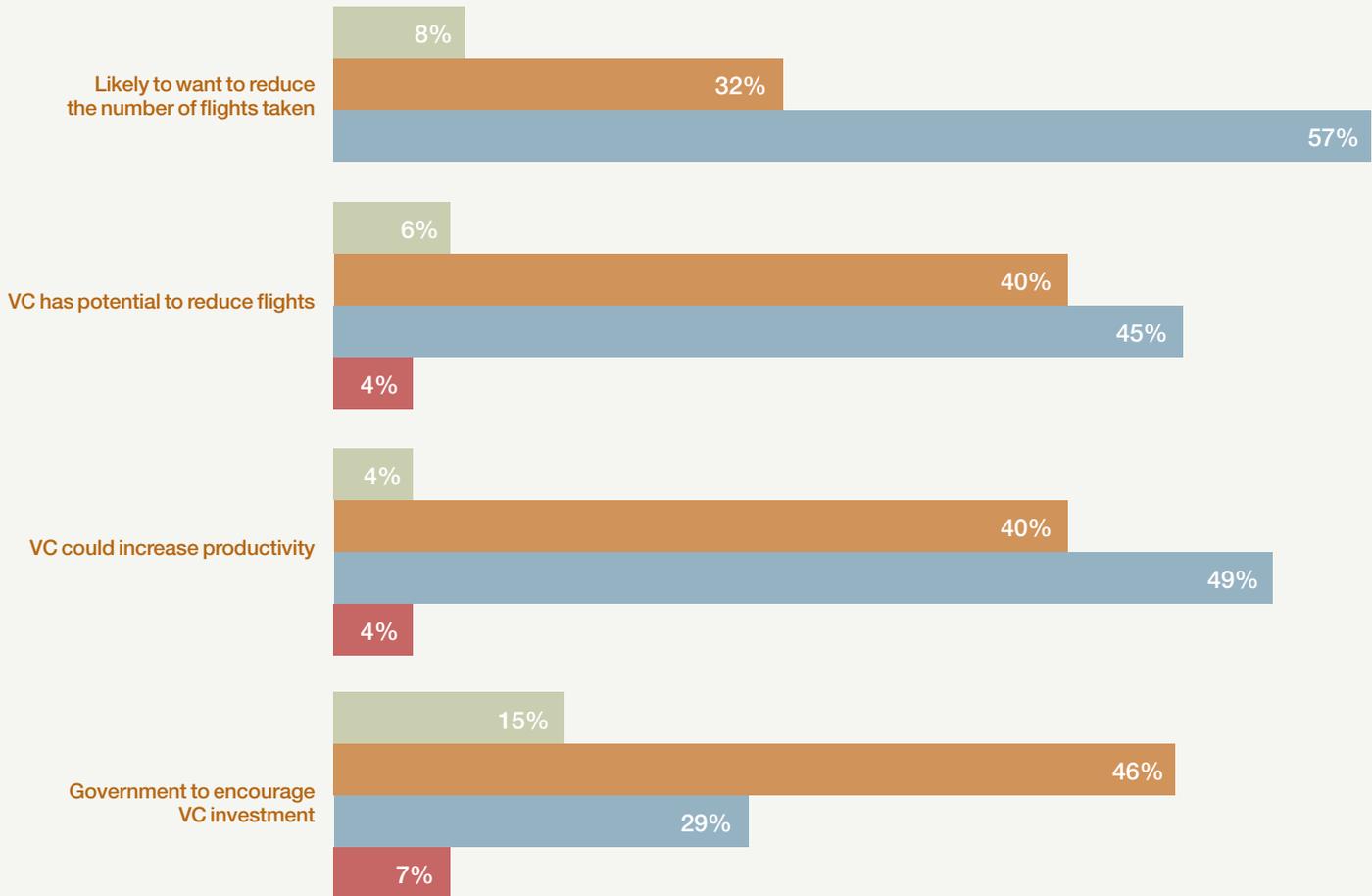
A number of other initiatives were suggested. These were wide-ranging in nature covering value-added tax (VAT) concessions on new technology, improving public transport in general, reducing rail fares, flexible working, and service capability.



5 Attitudes towards videoconferencing

Respondents were read out four statements, relating to different aspects of business travel and the use of videoconferencing, and asked to state the level to which they agreed or disagreed with each one.

Level of agreement / disagreement with attitudinal statements



Base: All respondents (100)

Three out of the four statements evoked very high levels of agreement i.e. 85% or more:

- 'My organisation is likely to want to reduce the number of flights taken by employees over the next ten years' (89% agreement)
- 'Used well, videoconferencing could increase the productivity of my organisation' (89% agreement)
- 'Videoconferencing has the potential to reduce the number of flights taken by my organisation' (85% agreement)

While the statement 'the government should do more to encourage firms to invest in videoconferencing technology' recorded a lower level of agreement (particularly the proportion agreeing strongly), this is still high at 75% and is perhaps a reflection of the results pertaining to government initiatives.

Research conclusions

The research reveals that the vast majority of the FTSE 350 companies surveyed are already working to reduce the environmental impact of their travel:

- Business travel is an area where 86% of companies claim to be actively seeking to reduce their carbon footprint.
- Over 70% of companies either had or were developing a corporate policy which encourages green business travel, i.e. use of lower carbon travel choices and alternatives.

There is both an expectation and a desire among leading UK companies to reduce their flying footprint in the coming years, especially the number of short-haul flights:

- 89% of companies expect they will want to reduce their flights in the next ten years.
- 32% of companies expect a fall in the total number of business flights taken by their company over the next year.
- On average, businesses anticipate taking 3% fewer business flights over the next year.

Videoconferencing is seen to have the potential to play a major role not only in reducing the time, cost, and carbon emissions associated with business travel but also in increasing productivity:

- 85% of companies agree that videoconferencing has the potential to reduce the number of flights taken by their organisation.
- 70% of respondents claim that their CEO is in favour of videoconferencing.
- When used well, videoconferencing is seen as a method of enhancing their productivity by 89% of firms.
- Of those companies already using videoconferencing, the great majority (75%) claim it has had at least some impact in reducing air travel.

Despite considerable enthusiasm, respondents do, however, suggest that their companies will need some encouragement to make greater use of videoconferencing in the future:

- Maximising its potential benefits will be dependent on addressing the following areas of concern associated with videoconferencing providers:
 - the quality of the experience needs to be better
 - the equipment has to be user-friendly with good interoperability across different systems
- 75% of companies believe that investment in videoconferencing should be encouraged by the government.

Next steps for greener business travel

Creating a business travel policy to reduce flying

There are three main ways of reducing carbon emissions from business travel:

- **Eliminate unnecessary meetings**
- **Substitute non-travel alternatives where possible, such as audio or videoconferencing**
- **Choose low carbon travel alternatives, such as rail in preference to air**

Creating, implementing and managing a green business travel policy need not be complex or costly but it does require a structured approach. As with all culture change initiatives, success will depend on strong leadership from senior management and a willingness by employees to change their travel behaviour. Positive communications are key to the success of introducing, and maintaining, a green travel policy.

In order to be effective, greener business travel requires:

- Company-wide willingness to reduce carbon emissions from business travel
- The careful definition of requirements for business travel
- The creation of a green travel policy
- The introduction and implementation of this policy throughout the organisation, including incentives/targets for employees to use it
- Monitoring of both commercial and environmental benefits (for example, costs/time/carbon saved, air miles avoided).

Useful information sources

Useful sources of information which promote greener business travel and the use of videoconferencing include:

Project Icarus

Project Icarus is run by the Institute of Travel Management, the leading professional body representing buyers, managers and suppliers of business travel in the UK and Ireland. The project aims to reduce CO₂ emissions from business travel in line with government targets in the Climate Change Bill.

Project Icarus offers companies interested in greening their business travel:

- 1) A toolkit for establishing standards and practices for travel policies and carbon emission reporting, travel avoidance options, and training in the use of videoconferencing
- 2) An accreditation scheme with bronze, silver, gold and platinum levels to recognise organisations which target and reduce emissions
- 3) Environmental awards which honour travel suppliers who have demonstrated developments which have resulted in reduced travel emissions.

Further information about Project Icarus can be found at www.itm.org.uk/icarus.

Wainhouse Research

Wainhouse Research is an independent market research firm that focuses on key issues in the videoconferencing market—specifically audio, video, and web conferencing products, applications, services and vendors.

The firm also publishes a news bulletin, white papers and market statistics about the videoconferencing market and reviews the latest products.

Further information about Wainhouse Research can be found at www.wainhouse.com.

How WWF-UK can help you move to a low carbon travel policy

This survey outlines the desire of top FTSE companies to reduce their carbon footprint through fewer business flights. The real benefits of reducing the number of business flights a company makes, and the potential of technological advances in videoconferencing systems to reduce the need to travel, are not only excellent business options but also demonstrates companies care about the quality of life of their employees.

WWF-UK seeks to find practical solutions in the face of climate change moving the UK towards a One Planet Future, where we take account of the ecological limits of the planet. During 2008, WWF-UK will be launching a campaign to reduce the carbon footprint of companies through travelling less and moving to lower carbon travel where possible or using 'virtual' meetings for those trips not replaceable by other transport modes. We will be asking companies to 'cut one in five' flights. Are you a company that would like to make savings on reduced travel costs and are looking to reduce your carbon footprint but do not know how?

If you would like to work with WWF-UK to find smart solutions to reducing your business flights, email: oneinfive@wwf.org.uk for more information on how you can join our new business scheme and 'cut one in five' flights.

One Planet Mobility

Over the last 18 months, WWF-UK has been working with over 35 leading EU organisations from the transport sector in a project called One Planet Mobility. During this work we have gained a common understanding about the system of mobility and formed conclusions about the key leverage points for transformational change towards mobility within planetary limits. Later this year we will publish the One Planet Mobility report which will highlight the conclusions of this project.

Further information about this programme can be found on www.wwflearning.org.uk/one-planet-business.



Case studies

As part of the Critical Research survey, participants were asked if they wished to be considered for potential inclusion as a case study in this report. Of those interested, the Royal Bank of Scotland and Man Group emerged as doing most to use videoconferencing to reduce their business travel, including flying. WWF-UK wishes to thank both companies for providing such informative accounts of their use of videoconferencing and its benefits.

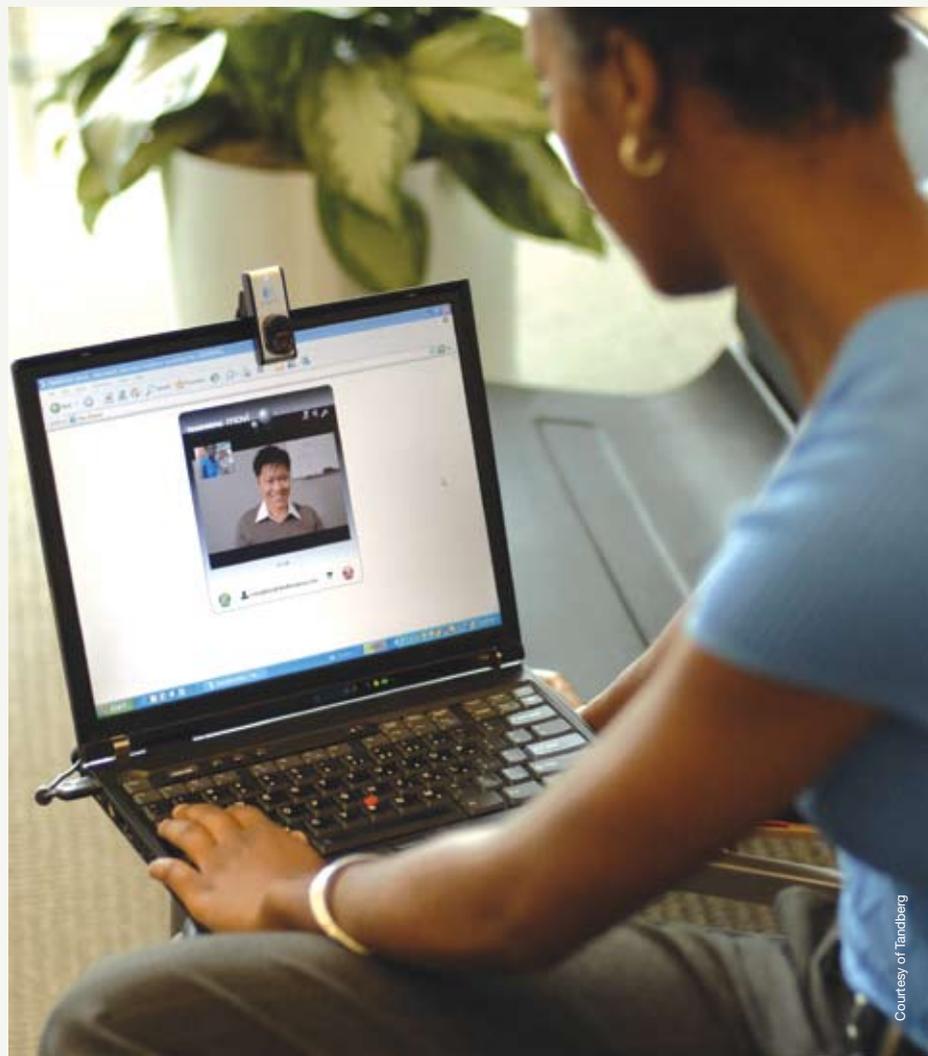
RBS Group plc

At RBS, we have invested heavily in videoconferencing over the last few years primarily because we see it as a way to help our employees communicate more easily with one another. Communication systems are one of our main business tools, and videoconferencing adds a useful visual dimension to meetings that might otherwise feel remote. Our use of videoconferencing also fits well with our continued efforts to reduce the environmental footprint of our business, particularly with regard to greenhouse gas emissions. By removing the need to travel physically to meetings (which can mean flying over large distances), videoconferencing allows us to operate more efficiently in terms of cost, time, and impact on the environment.

Since 2004 we have almost doubled the number of videoconferencing facilities installed across the Group from 430 to around 800. In 2007 a total of 35,256 participants took part in 13,292 separate videoconferences between our offices. These videoconferences are frequently used to replace flights, and with a typical return flight from Edinburgh to London emitting approximately 140kg of CO₂ per person, the savings in greenhouse gas emissions are considerable. We recognise the significant global threat posed by climate change, and videoconferencing is one of the ways we are systematically reducing our environmental footprint. Other examples include our £55 million programme of investment into energy efficiency measures in our buildings as well as our switch to 100% renewable energy for our UK and Ireland operations.

We find videoconferencing works particularly well in situations where small groups of people (as opposed to individuals) need to communicate with one another from two distant bases. Audio conferences and WebEx can also be used in these types of situation, but videoconferencing makes it easier to keep track of who is speaking. Videoconferencing is a useful communication tool and we anticipate further growth in the use of our videoconferencing facilities as a result of our continued efforts to reduce staff travel.

Andrew Cave,
Head of Corporate Responsibility,
RBS Group plc



Man Group plc

As a global business, it is vital that our structure and governance is robust and effective, taking into account the geography and diversity of our market. We currently use videoconferencing in all of our global offices. As part of our governance, we have to ensure that those concerned with client contact, risk management and other back office processes have the opportunity to meet regularly. This is to make sure that how we deal with our clients continues to reflect the needs of our marketplace. Videoconferencing allows groups of our people to meet face to face 'in committee' from their individual offices in a cost and carbon effective way.

Videoconferencing has also proved useful in improving our media presence, allowing us face to face contact with international press. Our Chief Executive Officer (CEO), Peter Clarke, recently conducted a videoconference interview with a major US newspaper – the journalist was asking questions from our New York office, while our CEO offered his answers from London. Our CEO was also able to allow the journalist interactive access to our climate change microsite, so that she could calculate her own carbon footprint. All of this happened over a 3,000 mile distance, and saved over fifteen hours flying and the equivalent of almost 5 tonnes¹⁰ of CO₂.

It's difficult to be precise as to how much videoconferencing has reduced our business flying, because we are currently putting in processes to measure this. However, anecdotal evidence would suggest that we have reduced travel by around 20 long haul flights and 15 European flights per month. By that same rationale, in cases where we have consciously used videoconferencing instead of flying, we estimate we have avoided producing the equivalent of 750 tonnes of CO₂ per annum. Conservatively, we also estimate that the annual cost savings in flights not taken comes to around \$1M.

Ultimately, videoconferencing is a 'quick win' in terms of mitigating our CO₂ footprint. It reduces opportunity cost by reducing our people's traveling time and sends a strong message to all stakeholders that we are serious about tackling climate change whilst maintaining positive and effective interaction. It's also a very effective medium for including more interested parties in a meeting than might be practical if everyone involved had to travel, and ad hoc 'meetings' can take place in a more personal way than simply over the telephone.

Rob Challis,
*Global Head of Corporate Responsibility,
Man Group plc*

¹⁰ Using a multiplier of 2.7 to account for the non-CO₂ impacts of aviation on the climate

Appendix 1

- research methodology and sample

The quantitative survey comprised the following steps:

The sampling frame consisted of a list of the FTSE 350 companies;

These organisations were contacted by telephone and the person responsible for setting corporate policy regarding business travel identified. This person was then asked to participate in the survey;

Interviewers conducted a telephone interview or, if preferred, respondents could complete the survey online;

Each interview was of approximately 20 minutes' duration.

Analysis and reporting

Of more than 200 companies contacted, a total of 100 were willing and able to participate in the survey in the period 4-20 February 2008. This is an extremely high response rate among such a target audience and is a reflection of the interest in the subject matter. In this study while the total sample is relatively small (i.e. 100 respondents), it has been drawn from a very small population (i.e. 350 companies), across a broad cross section of industries. Consequently the level of sampling error is low and confidence in the findings high. The largely structured questionnaire used was developed by Critical Research and agreed with WWF-UK prior to fieldwork.

Respondents were offered a synopsis of main findings as a means of thanking them for participating in the survey.

Total number of respondents: 100

Job title

Environmental Director/Manager	28
CSR Director/Manager	18
Operations/Services	15
Marketing/PR/Communications	9
Human Resources	8
Sustainability Director/Manager	6
Company Secretary	4
Procurement	4
Business Travel Manager	3
Other	5

Sectoral split

Manufacturing and construction	27
Finance	18
Real estate, renting etc	17
Wholesale and retail	9
Other	29

Location of corporate HQ

London	36
Home counties	18
Elsewhere	46

Appendix 2

- survey questionnaire

The purpose of this survey is to understand what top UK corporates and city firms are now doing or intend to do in future to reduce their carbon footprint arising from business travel - particularly flying for work. As one of WWF's priorities is to promote the uptake of videoconferencing and other alternatives to business flying, the results of this survey will be used to inform political and campaigning work in this area.

1

Firstly, to date, how much of an impact has the climate change and environmental debate had on the way your organisation conducts its business? Would you say it has had...

- 1) A very big impact
- 2) A fairly big impact
- 3) Not much of an impact
- 4) No impact at all
- 0) DK/NA

2

And which of the following best reflects your views on the likely level of change in the way you conduct business as a result of climate change over the next 10 years?

- 1) There will be a lot of changes to the way we do business as a result of climate change
- 2) There will be some changes as a result of climate change
- 3) There will be no changes as a result of climate change
- 0) DK/NA

3

Is your organisation actively seeking to reduce its carbon footprint?

- 1) Yes - already doing so
- 2) Yes - developing plans to do so
- 3) No

4

And is business travel an area where your organisation is seeking to reduce its carbon footprint?

- 1) Yes - already doing so
- 2) Yes - developing plans to do so
- 3) No

5

A growing number of companies have a corporate policy which encourages green business travel, by which I mean the use of lower carbon travel choices and alternatives. Does your organisation have or intend to have such a policy?

- 1) Yes - already have one
- 2) Yes - developing one
- 3) No

6

Could you please tell me the major highlights of your existing or intended plans?

- Do you have any quantitative targets for reducing flights?
- Are there any destinations where the train must be taken instead of the plane?

7

Looking ahead, which of the following do you expect your business travel policy will encourage...

- 1) Fewer meetings requiring travel
- 2) Fewer meetings requiring air travel
- 3) More travel by train to meetings
- 4) More use of videoconferencing
- 5) More use of audioconferencing (over the phone)
- 6) More home working
- 7) More use of Webex and other web-based collaboration methods
- 8) Other
- 9) NONE OF THE ABOVE

8

Who has driven the development of your green business travel policy?

- 1) CEO
- 2) Board members
- 3) Shareholders
- 4) Other (Type in at next screen)

9

And how involved has your CEO been in the development of your green business travel policy? Would you say....

- 1) Very involved
- 2) Quite involved
- 3) Not very involved
- 4) Not at all involved
- 0) DK/NA

Flights1

I would now like to ask about your company's business flights. Would you say that the total number of flights taken by your organisation over the past year has...

- 1) Increased significantly
- 2) Increased slightly
- 3) Remained about the same
- 4) Decreased slightly
- 5) Decreased significantly
- 0) DK/NA

Flights2

And would you expect the total number of flights taken by your organisation over the next year to...

- 1) Increase significantly
- 2) Increase slightly
- 3) Remain about the same
- 4) Decrease slightly
- 5) Decrease significantly
- 0) DK/NA

10a

And would you be able to provide me with more precise figures about the changes to your organisation's flights?

- 1) Yes
- 2) No - Won't reveal them
- 3) No - We don't have them
- 0) DK/NA

10b

By roughly what percentage would you say that the total number of flights taken by your organisation has changed over the past year.

- 1) Increase (Enter figure at next screen)
- 2) No change
- 3) Decrease (Enter figure at next screen)
- 0) DK/NA

10c

And by roughly what percentage would you expect the total number of flights to change over the next year?

- 1) Increase (Enter figure at next screen)
- 2) No change
- 3) Decrease (Enter figure at next screen)
- 0) DK/NA

11a

I would now like you to think about your company's long-haul flights. By roughly what percentage would you say that the number of long-haul flights taken by your organisation has changed over the past year.

- 1) Increase (Enter figure at next screen)
- 2) No change
- 3) Decrease (Enter figure at next screen)
- 0) DK/NA

11b

And by roughly what percentage would you expect long-haul flights to change over the next year?

- 1) Increase (Enter figure at next screen)
- 2) No change
- 3) Decrease (Enter figure at next screen)
- 0) DK/NA

12a

I would now like you to think about your company's short-haul flights. By roughly what percentage would you say that the number of short-haul flights taken by your organisation has changed over the past year?

- 1) Increase (Enter figure at next screen)
- 2) No change
- 3) Decrease (Enter figure at next screen)
- 0) DK/NA

12b

And by roughly what percentage would you expect short-haul flights to change over the next year?

- 1) Increase (Enter figure at next screen)
- 2) No change
- 3) Decrease (Enter figure at next screen)
- 0) DK/NA

13

Are there any particular reasons why your organisation might choose to fly less in the future?

14

I would now like you to think about videoconferencing, by which we mean any system that incorporates audio, video, computing and communications technologies to allow people in different locations to collaborate electronically, face-to-face and in real time. How frequently does your company currently use videoconferencing? Would you say...

- 1) Routinely
- 2) Often
- 3) Occasionally
- 4) Rarely
- 5) Never
- 0) DK/NA

15

And what impact, if any, has the use of videoconferencing had in reducing your organisation's business flying? Would you say...

- 1) Major
- 2) Moderate
- 3) Slight
- 4) None
- 0) DK/NA

16

For your organisation, would you say that videoconferencing has brought...

- 1) Many benefits
- 2) Some benefits
- 3) Few benefits
- 4) No benefits
- 0) DK/NA

17

How interested would your organisation be in using videoconferencing in future? Would you say...

- 1) Very interested
- 2) Somewhat interested
- 3) Not at all interested
- 0) DK/NA

18

I am now going to read out a series of factors which might affect your company's use of videoconferencing in the future. For each one could you please tell me the extent to which you think it would increase your use with the scale:

A great deal
Somewhat, or
Not at all

So firstly...

18a

Lower cost of videoconferencing technology. To what extent might that increase your company's use of videoconferencing in the future?

- 1) A great deal
- 2) Somewhat
- 3) Not at all
- 0) DK/NA

18b

Greater CEO or senior management support for videoconferencing. To what extent might that increase your company's use of videoconferencing in the future?

- 1) A great deal
- 2) Somewhat
- 3) Not at all
- 0) DK/NA

18c

Increase in price of air travel. To what extent might that increase your company's use of videoconferencing in the future?

- 1) A great deal
- 2) Somewhat
- 3) Not at all
- 0) DK/NA

18d

Increased CSR concerns about carbon reduction. To what extent might that increase your company's use of videoconferencing in the future?

- 1) A great deal
- 2) Somewhat
- 3) Not at all
- 0) DK/NA

18e

Greater compatibility of different videoconferencing systems. To what extent might that increase your company's use of videoconferencing in the future?

- 1) A great deal
- 2) Somewhat
- 3) Not at all
- 0) DK/NA

18f

Improved or better quality of videoconferencing experience. To what extent might that increase your company's use of videoconferencing in the future?

- 1) A great deal
- 2) Somewhat
- 3) Not at all
- 0) DK/NA

19

What other factors, if any, might increase your company's interest in using videoconferencing in the future?

20

Thinking about your CEO's opinion of videoconferencing, would you say that they are...

- 1) Strongly in favour
- 2) Generally in favour
- 3) Neutral or unaware
- 4) Generally anti
- 5) Strongly anti
- 0) DK/NA

21

Why do you think that is?

22

Which, if any, of the following could the Government introduce to best help your organisation achieve greener business travel?

- 1) Loans to purchase appropriate videoconferencing equipment
- 2) An enhanced capital allowance scheme for videoconferencing equipment allowing your company to write off the cost much faster than usual
- 3) Greater investment in high speed rail infrastructure
- 4) More help with work travel planning
- 5) Greater certainty over future environmental regulation
- 6) Other
- 7) NONE OF THE ABOVE
- 0) DK/NA

23

Next I'm going to read out 4 statements and for each one I would like you to say whether you:

Agree strongly
Agree slightly
Disagree slightly, or
Disagree strongly

So firstly...

23a

My organisation is likely to want to reduce the number of flights taken by employees over the next ten years. To what extent do you agree or disagree with that?

- 1) Agree strongly
- 2) Agree slightly
- 3) Disagree slightly
- 4) Disagree strongly
- 0) DK/NA

23b

Videoconferencing has the potential to reduce the number of flights taken by my organisation. To what extent do you agree or disagree with that?

- 1) Agree strongly
- 2) Agree slightly
- 3) Disagree slightly
- 4) Disagree strongly
- 0) DK/NA

23c

Used well, videoconferencing could increase the productivity of my organisation. To what extent do you agree or disagree with that?

- 1) Agree strongly
- 2) Agree slightly
- 3) Disagree slightly
- 4) Disagree strongly
- 0) DK/NA

23d

The Government should do more to encourage firms to invest in videoconferencing technology. To what extent do you agree or disagree with that?

- 1) Agree strongly
- 2) Agree slightly
- 3) Disagree slightly
- 4) Disagree strongly
- 0) DK/NA

24

And do you have any other comments you would like to make about the use of videoconferencing and its potential impact on business travel?

25

Lastly, I'd like to ask a few questions just to place your answers into context. Please could you tell me your job title.

- 1) Business Travel Manager
- 2) CSR Director/ Senior Manager
- 3) Sustainability Director/ Senior Manager
- 4) Environmental Director/ Senior Manager
- 5) Finance Director
- 6) Other

26

In which industry sector are your main operations?

- 1) Construction
- 2) Electricity
- 3) Oil & Gas
- 4) Water
- 5) Finance
- 6) Hotels and Restaurants
- 7) Mining & Quarrying
- 8) Manufacturing
- 9) Real Estate, renting and business activities
- 10) Transport, storage and communication
- 11) Wholesale and Retail trade
- 12) Other

27a

And are your UK corporate headquarters in London or the Home Counties?

- 1) Yes - London
- 2) Yes - Home Counties
- 3) Somewhere else

27b

And where are they please?

28

Could I please take a note of your email address so that we can send you the digest of findings?

- 1) Yes - want emailed digest
- 2) No - want results by post
- 3) No - don't want results

29

Whilst your answers will remain anonymous, would you like your organisation to be listed as a participant in this survey when we publish our findings?

- 1) Yes
- 2) No

30

We hope to include a number of best-practice videoconferencing case studies in our final report. Would your organisation be willing to be contacted by WWF at a later date to discuss this possibility?

- 1) Yes
- 2) No

Appendix 3

- acknowledgements

WWF-UK wishes to thank Critical Research and the one hundred FTSE 350 companies who agreed to participate in our survey, including the following:

AB Food
Aga Food Service Group
Alliance & Leicester
Alliance Trust
Amec
Ashtead Group
Atkins
Berkeley Group
Big Yellow Group
Bovis Homes Group
Cadbury Schweppes
Chemring Group
Croda International
Drax Group
DSG International
Eaga
Easyjet
Edinburgh Investment Trust
Electrocomponents
Experian Group
Expro International Group
Filtrona
Firstgroup
FKI
Glaxo Smithkline
HBOS
HSBC Holdings
IMI
International Personal Finance
Interserve
ITV
Land Securities
Liberty International
LogicaCMG

Man Group
Mapeley
Marks & Spencer
Marshalls
Michael Page International
Mitie Group
Mondi
Monks Investment Trust
Morgan Sindall
National Grid Transco
Northumbrian Water Group
Pennon Group
Punch Taverns
Quintain Estates & Development
Rank Group
Rathbones
Reckitt Benckiser
Reed Elsevier
Royal Bank of Scotland
Savills
Segro
SIG
Travis Perkins
Trinity Mirror
UK Coal
Unite Group
United Utilities
Wincanton
WPP Group





The mission of WWF is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by

- conserving the world's biological diversity
- ensuring that the use of renewable natural resources is sustainable
- reducing pollution and wasteful consumption

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