



ENVIRONMENTAL POLICY AND EFFICACY

COMMUNICATION STRATEGIES TO INCREASE PUBLIC SUPPORT

MAY 9, 2023

ENVIRONICS
RESEARCH

Agenda

Objectives and approach	3
Key takeaways	6
Public opinion context	7
Message testing: Emissions cap & clean electricity grid	11
Information needs: Protected areas	19
Social values profiling	24
Thoughts for consideration & break-out groups	33
Additional content	
Indigenous-led conservation	35
Ad hoc topics	40
Demographics & Appendix	46

Introduction

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Research Objective



Situation | Members expressed a need to identify messages that will motivate Canadians to support action on climate and nature.



Opportunity | Build on previous research with a communications testing exercise involving different messages and frames focused on: protected areas, an oil and gas emissions cap, and a clean electricity grid.



Goal | Understand the communication strategies that will resonate and increase public support for climate and nature policies and initiatives, even in the context of economic headwinds.



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Methodology

Type | 15-minute online survey from April 13 to 26, 2023

Sample | N=2,294 adult Canadians drawn a large online panel of Canadians who have previously completed a Social Values profile. The sample was stratified by region to ensure adequate subsamples for analysis in smaller provinces and then weighted to match population statistics. As online surveys use opt-in panels, this is a non-probability sample, and a margin of sampling error does not apply.

Province (% pop)	Unweighted n	Weighted n
BC (14%)	324	311
AB (12%)	270	265
SK (3%)	126	71
MB (4%)	126	83
ON (39%)	555	886
QC (23%)	456	529
NB (2%)	162	48
NS (3%)	177	60
PEI/NFLD (2%)	98	41

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KEY TAKE- AWAYS

1

The issue environment remains challenging: focus is on cost of living and climate attitudes appear static.

2

There is no single 'winning argument'; a mix of messaging is required. Simple and optimistic messages are preferred - particularly when balanced with logical solutions, existing progress or successful examples.

3

Three audiences exist that mirror the ideas currently permeating the climate/nature debates (what does it mean for me, for the economy, and for the planet/all living things?).

4

By looking at their social values, we can better understand their unique way of seeing the world and what might resonate with them.

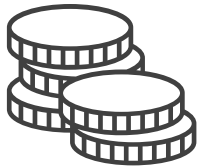
Public opinion context

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Most important problem facing Canadians

Climate change/the environment continues to rank among the most important facing Canadians today, but well behind the cost of living.

Q5. In your opinion, what is the most important problem facing Canadians today?



45%

Cost of living



10%

Housing cost/availability



10%

Health care



9%

The economy



8%

Climate change



8%

Government representation /poor politicians



<1%

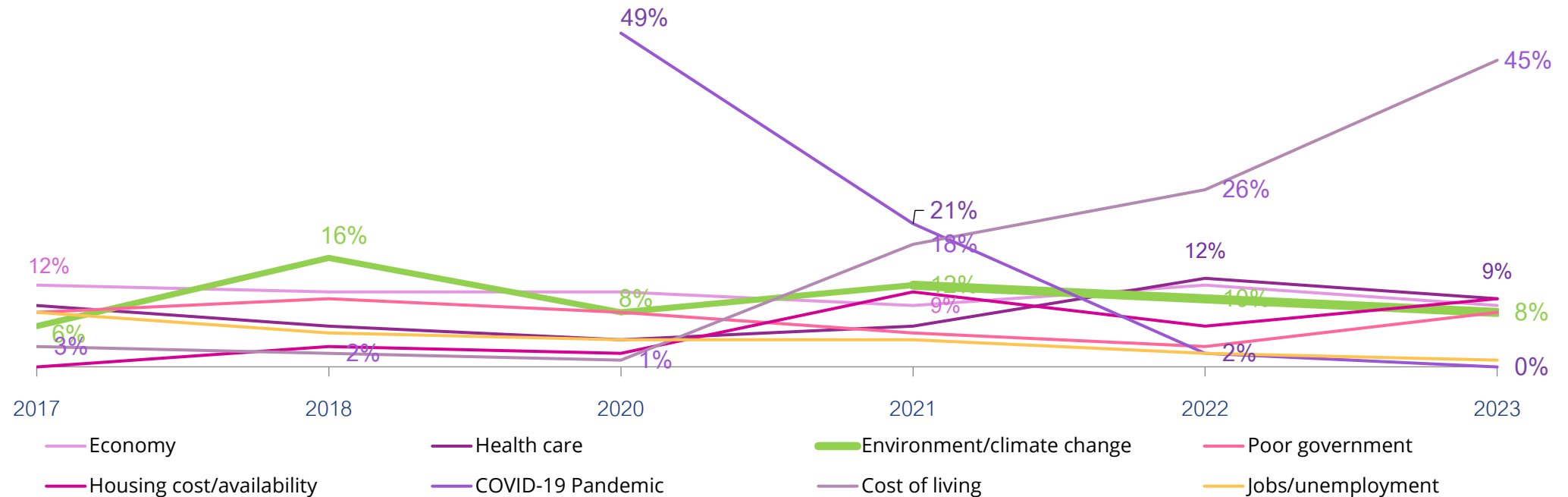
Covid-19/the pandemic

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Most important problem facing Canadians

With the COVID-19 pandemic falling completely off the public radar, almost half of Canadians now identify cost of living as the most important national issue, well ahead of the environment/climate change (at 8%).

Q5. In your opinion, what is the most important problem facing Canadians today?

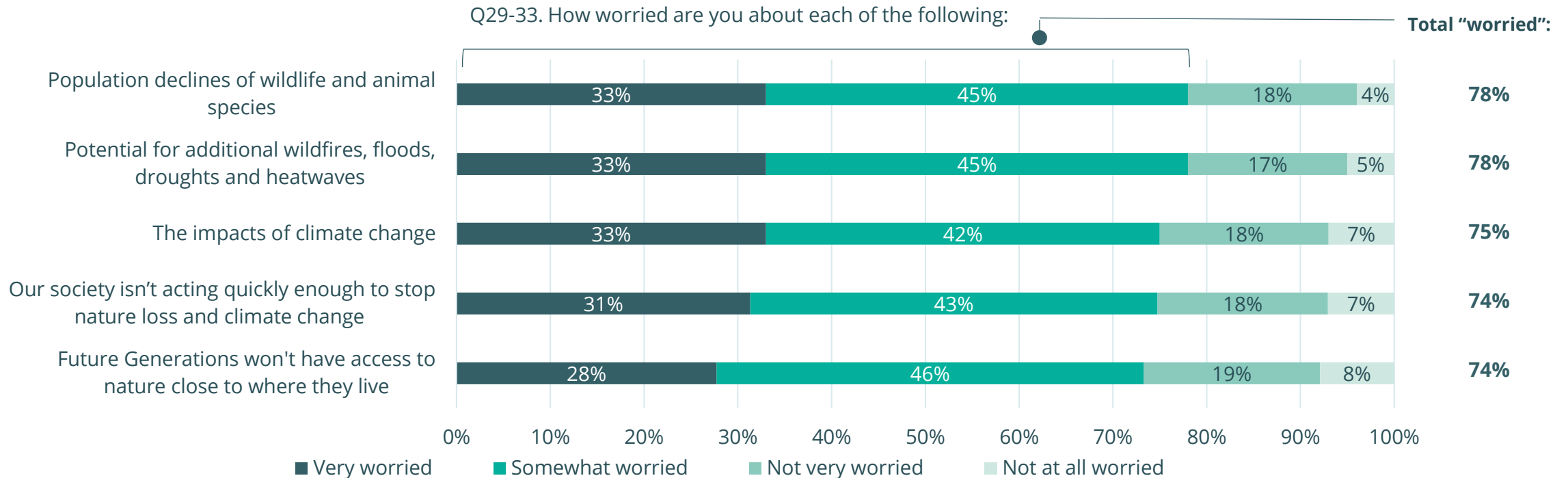


*2017-2020 and 2022 data are from the Climate of Change survey; 2021 and 2023 data are from data collected by Environics Research for EcoAnalytics

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Strong climate concern is limited to about one in three

There is a consistent pattern in how Canadians react to questions about climate-related concerns: roughly one in three are most worried, and another four in ten are moderately worried.



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Oil & gas emissions cap

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Introduction to MaxDiff Analysis

MaxDiff is a choice modeling exercise that lets respondents choose the 'best' and 'worst' options out of a given set of options, providing a relative ranking for each option in aggregate list.

MaxDiff for message testing | MaxDiff exercises were included to understand which messaging frames Canadians prefer in each of three policy areas. Respondents were shown a series of screens (see right), each displaying a subset of the 15+ messages. For each subset, they picked the message they view as most convincing and least convincing. This is preferable to a straight ranking of 15+ items, as it is less overwhelming and measures the distance between items.

How to read the results | The outcome represents the *share of preference* in the minds of respondents, i.e., a score of 8 would be considered twice as convincing as a message with a score of 4.

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Which of the options below is the information you feel is **most important** to know about a plan to create a protected area in your region, and which information is **least important** to know?

(1 of 11)

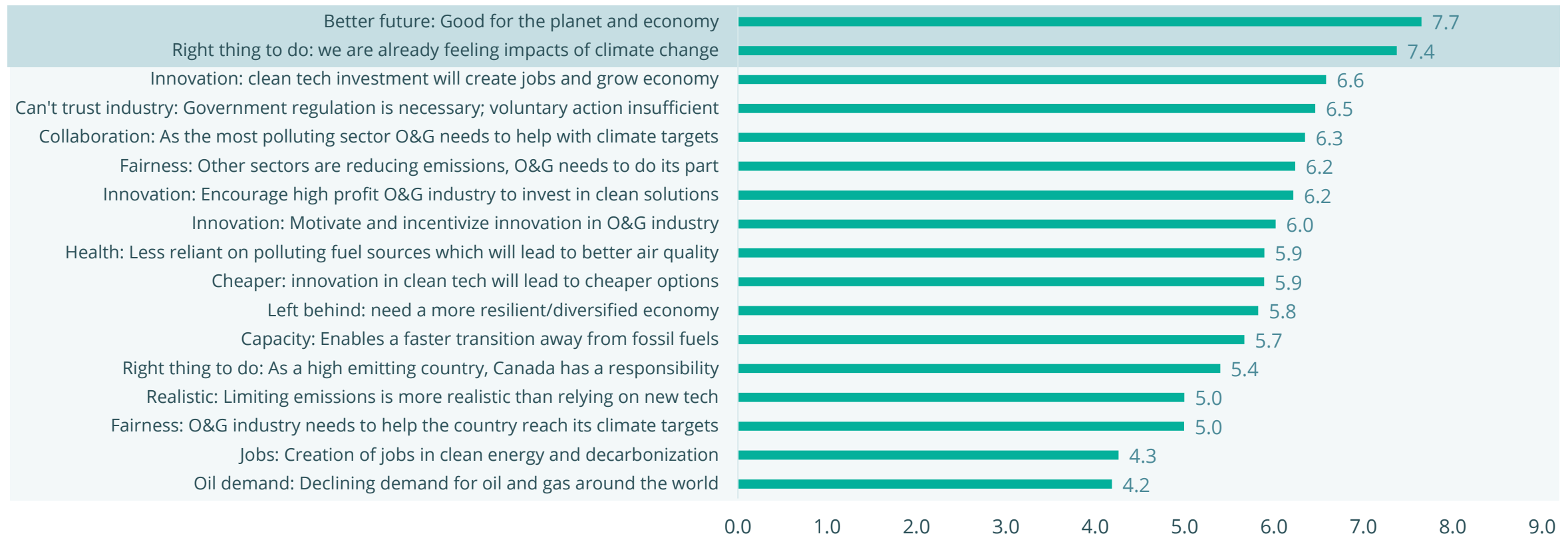
Most Important		Least Important
<input type="radio"/>	Impact on local businesses in the region	<input type="radio"/>
<input type="radio"/>	The number of years the land will be protected by law	<input type="radio"/>
<input type="radio"/>	Impact on housing affordability in the region	<input type="radio"/>
<input type="radio"/>	Impact on job opportunities in the region	<input type="radio"/>

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What message will convince Canadians to support a cap on oil and gas emissions?

Q15 (MaxDiff): Which of the statements listed below is most convincing and least convincing reason to **limit and reduce oil and gas industry emissions** ? (n= 1,147)



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Note: O&G = Oil and Gas. The chart above lists summarized/abridged versions of the messaging frames that were tested. A list of results with the full statements tested is available in the Appendix.

Most and least convincing reasons to cap emissions

Results show that there isn't a single winning argument. Each argument appeals at some level to some people. Thus, multiple messaging approaches are needed depending on the target audience.

Top 2 most convincing

- 1 Better future:** Reducing emissions is not only good for the planet, but it will also help Canada transition to a stable and prosperous economy with many jobs in the clean energy sector. **(7.7)**
- 2 Right thing to do:** Canadians and others around the world are already feeling the impacts of climate change. It's time for Canada to do its part in reducing emissions by placing a limit on emissions from oil & gas production. **(7.4)**

Bottom 2 least convincing

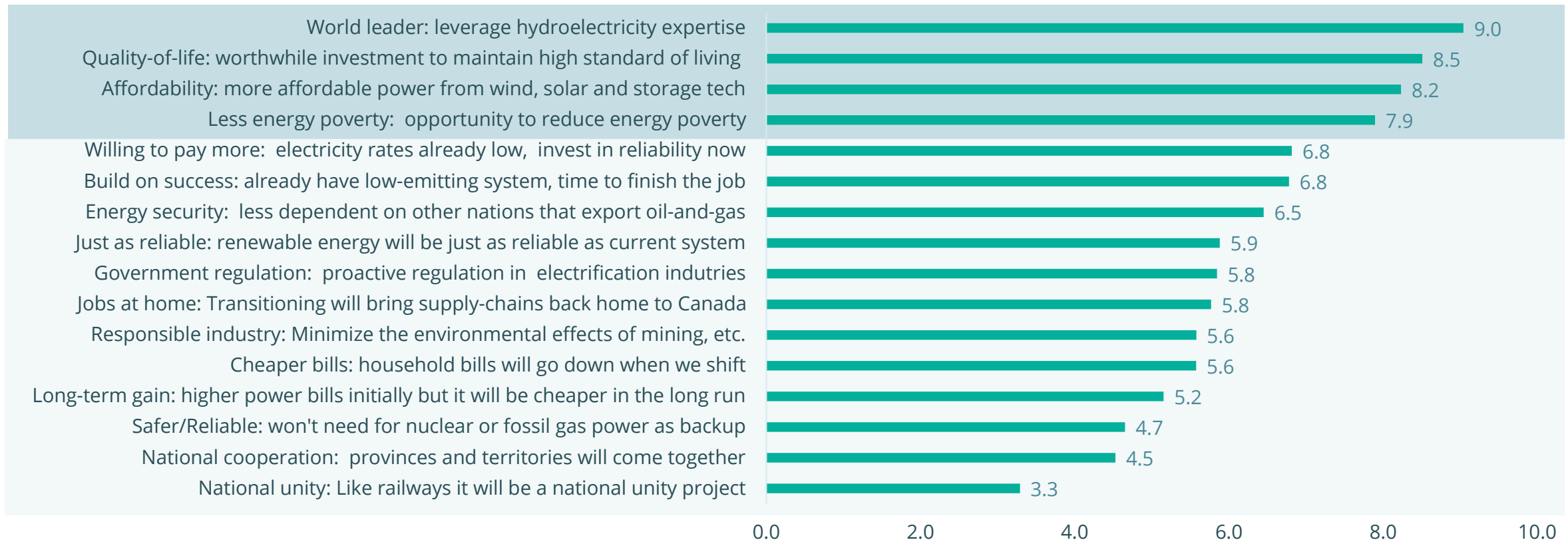
- 16 Jobs:** An emissions limit will trigger the creation of a huge number of well-paying jobs in decarbonization and clean energy. **(4.3)**
- 17 Oil demand:** Oil demand will decline around the world by 2030 so limiting emissions may prevent Canadian oil and gas companies from losing out to other countries producing oil with lower emissions. **(4.2)**

Clean electricity grid

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What message will convince Canadians to support moving to a clean electricity grid?

Q16 (MaxDiff): Which of the statements listed below is most convincing and least convincing reason for **moving to a zero-emitting electricity grid** ? (n=1,147)



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Most convincing reasons to support a clean electricity grid

Canadians gravitate towards arguments rooted in achieving a better future and leveraging momentum.

Top 4 most convincing

- 1 World leader:** In Canada, 82% of our electricity comes from sources like hydroelectricity, which is far less polluting than electricity generated from coal, oil and fossil gas. As the world shifts to zero-emitting energy, this is a chance for Canada to build on its success and lead the world. **(9.0)**
- 2 Quality of life:** Electricity is central to our quality of life and modern living, and in Canada we are fortunate to spend relatively little on something so important to our health and safety. It is worth investing in a clean electricity grid to maintain our standard of living in the future. **(8.5)**
- 3 Affordability:** Improving Canada's electricity grid is an opportunity to make energy more affordable by providing all Canadians with access to affordable power from wind, solar and storage technologies. **(8.2)**
- 4 Less energy poverty:** Improving Canada's electricity grid is an opportunity to reduce energy poverty by giving all Canadians access to energy efficiency programs and affordable power from wind, solar and storage technologies. **(7.9)**

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Least convincing reasons to support a clean electricity grid

Statements focused on national unity as the primary benefit were least convincing to Canadians.

Bottom 3 least convincing

- 14 Safer/Reliable:** Strengthening Canada's electricity transmission network across provinces means we don't need nuclear or fossil gas power to back up renewable energy. **(4.7)**
- 15 National cooperation:** Creating a zero-emitting electricity grid in Canada by 2035 requires national cooperation. This is a big opportunity to bring the provinces and territories together. **(4.5)**
- 16 National unity:** Like the railways that helped connect Canada, building a zero-emitting electricity grid by 2035 is a national unity project all Canadians can get behind. **(3.3)**

Protected areas

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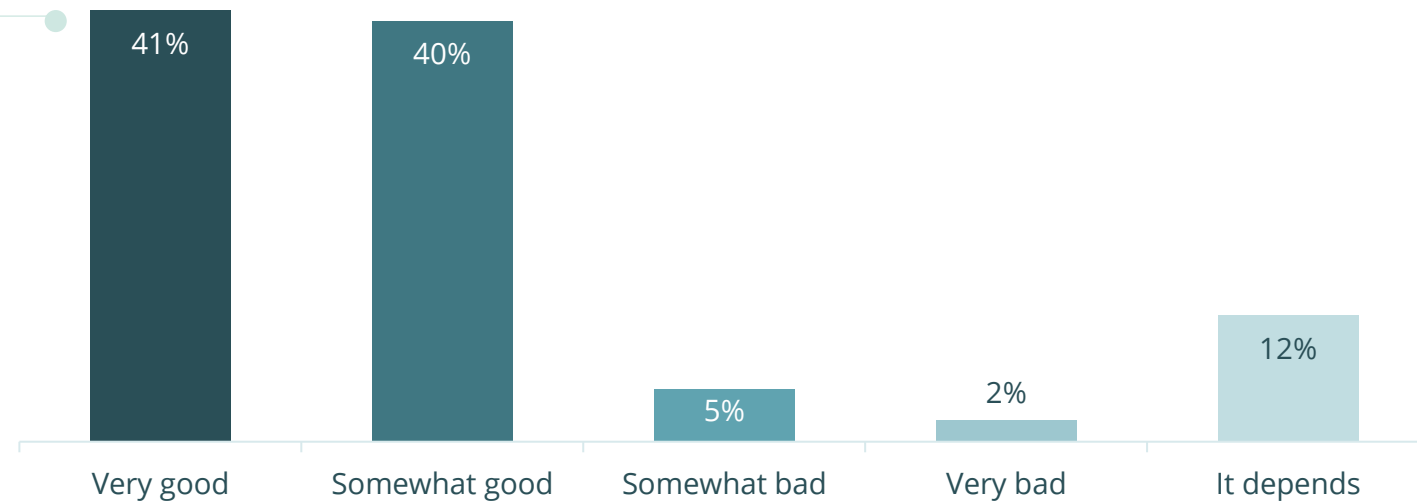
Canadians tend to think positively about protected areas, in theory

However, the 2022 qualitative research found that people do not know how protection will be achieved – and fill that information gap with assumptions. So what information do people want to know about proposals for new protected areas?

Q9. Please imagine there is a plan to legally protect an area of land in your region. In this protected area, the ecosystem of plants and animals will be safeguarded and restored through conservation science and Indigenous conservation practices. In your opinion, do you think this plan would be good or bad for your region?

More likely to say “very good”:

- NS (53%)
- Women (45%)
- White (44%)
- Strong left (70%) & left-leaning (65%)
- High climate concern (67%)



What do Canadians want to know about plans to create protected areas?

Q10 (MaxDiff): Which of the options below is the **information you feel is most important to know about a plan to create a protected area in your region**, and which information is least important to know?

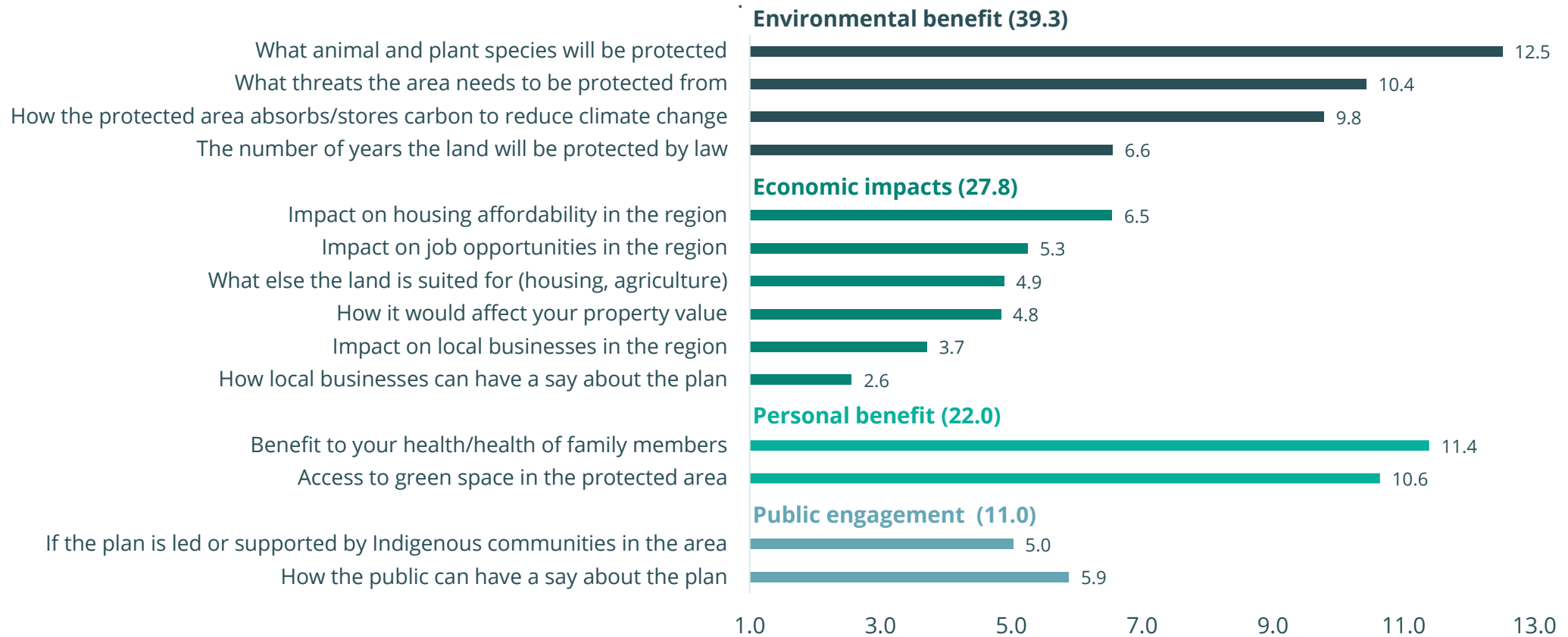


When it comes to plans for protected areas, there isn't one integral piece of information that Canadians feel is the most important to know. Rather, there are five pieces of information that Canadians feel they should know. Canadians view these top five statements as two to three times more important than other options presented.

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Preference is greatest for environmental info but is also needed for other themes

Q10 (MaxDiff): Which of the options below is the information you feel is most important to know about a plan to create a protected area in your region, and which information is least important to know?



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We can segment the population by their preference for info types

Segment 1 places the greatest importance on environmental info, while Segment 3 favours economic info.

Q10 (MaxDiff): Which of the options below is the information you feel is most important to know about a plan to create a protected area in your region, and which information is least important to know? .

		Segment 1	Segment 2	Segment 3
<i>Size (% of sample)</i>		31%	29%	40%
Type of Information	Environmental benefits	55.1	43.7	23.9
	Economic impact	9.5	21.8	46.3
	Personal benefits	21.0	27.6	18.8
	Public Engagement	14.5	6.9	11.1

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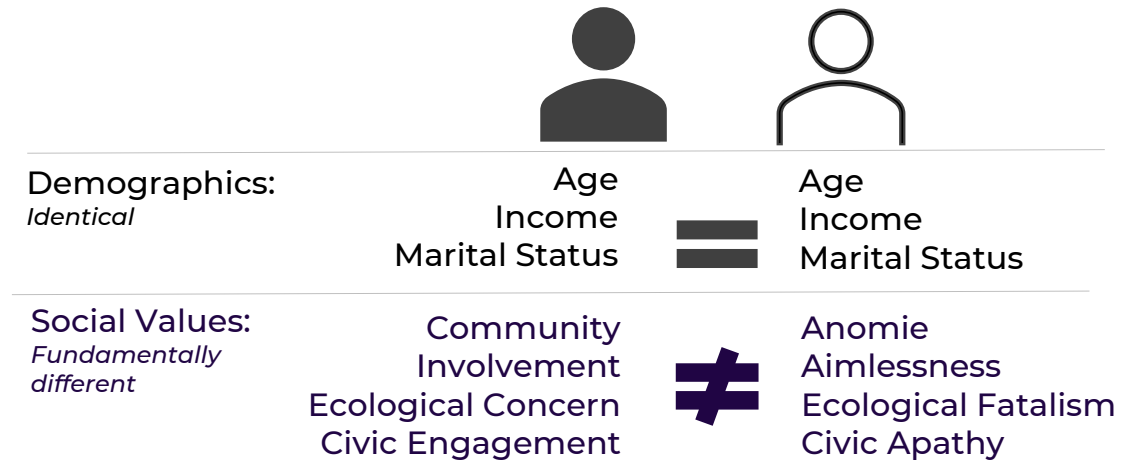
SOCIAL VALUES **PROFILING**

Social Values

Why do values matter?

Social values reveal why people do what they do and complement traditional demographics.

Two individuals who might be demographically identical can be **fundamentally different from a psychographic perspective:**



Social Values

Understanding your audience

Without a single winning message, organizations will need to communicate a variety of different messages.

Social values are key concepts – such as attraction to nature or the need for status recognition – that a person either embraces or rejects. They represent a person's priorities and motivations, as well as their most strongly held beliefs.

Together, social values;

- establish a person's orientation to life and their way of being in the world;
- shape lifestyle choices and aspirations;
- set the context for an individual's reactions to situations, people, opportunities and challenges.

Understanding the audience segments through a social values lens can help identify what messaging will resonate most strongly with different types of people.

ATTRACTION TO NATURE

How close people want to be to nature, whether to recharge their spiritual batteries or to enjoy a simpler, healthier or more authentic way of life.

Social Values

Segment 1: Rational Changemakers



GLOBAL CONSCIOUSNESS

Considering oneself a “citizen of the world” first and foremost, over a “citizen of one’s community and country”. Non-ethnocentricity, feeling affinity to peoples in all countries.



AVERSION TO COMPLEXITY

A desire to keep one’s life simple and predictable. People strong on this trend are intimidated and threatened by the changes and complexities in modern life and values. They look for stability and simplicity.



ECOLOGICAL CONCERN

A tendency to believe that today’s environmental problems are a result of industrial and personal disregard for the environment. These people believe the shift toward environmental destruction is unacceptable; and reject the notion that job protection or economic advancement should be allowed at the expense of environmental protection.



EMOTIONAL CONTROL

A propensity to give priority to reason as the principal way of understanding life. A desire to keep one’s emotional life “on an even keel”, to use logic and reason to control one’s feelings and emotions and to base day-to-day decisions on reason and logic. A reluctance to experience or express emotions.



REJECTION OF AUTHORITY

A belief in not playing by the rules. The belief that persons or organizations in positions of authority should not be deferred to at all times. There are rules in society but everyone shouldn’t necessarily follow them. Feeling that young people in particular should be taught to question authority rather than obeying it.

Social Values Segment 1

RATIONAL CHANGEMAKERS (31%)

Who are they?

Environmentally conscious and willing to challenge the status quo

How to gain their support?

Provide facts and evidence
Include clear calls to action
Appeal to sense of responsibility

What are the challenges?

Aversion to complexity
(keep it simple and logical)



Social Values

Segment 2: High energy hedonists



INTEREST IN THE UNEXPLAINED

Tendency to reject the assumption that all valid knowledge must be logical, rational or scientific in favour of an acceptance of beliefs or phenomena that remain mysterious or unexplained by modern science.



ATTRACTION TO CROWDS

Enjoyment of being in large crowds as a means of deindividuation and connection-seeking.



ACCEPTANCE OF VIOLENCE

People highest on this construct believe that violence is an inevitable fact of life that must be accepted with a certain degree of indifference. Belief that violence can be both cathartic and persuasive.



PURSUIT OF INTENSITY

Desire to live intensely. Also, a tendency to be guided less by reason and ideology than by one's own emotions, feelings and intuition. A need to constantly experience new sensations.



ADVERTISING AS STIMULUS

Tendency to enjoy viewing advertising for its aesthetic properties; to enjoy advertising in a wide range of venues, from magazines to television to outdoor signs and billboards

Social Values Segment 2

HIGH ENERGY HEDONISTS (29%)

Who are they?

Emotion driven, seeking stimulation, and personal benefits

How to gain their support?

Appeal to their FOMO
Focus on events/crowds
Use aesthetic content

What are the challenges?

Feelings-driven (make topics seem novel and exciting)



Social Values

Segment 3: Community driven conformists



OBEDIENCE TO AUTHORITY

A belief in playing by the rules. The belief that persons or organizations in positions of authority should be deferred to at all times. There are rules in society and everyone should follow them. Feeling that young people in particular should be taught to obey authority rather than question it.



TRADITIONAL FAMILY

Defining "family" in traditional terms as a man and a woman, married with children. Unwilling to expand the traditional concept of "family" beyond the legal formality of a marriage license to include same sex couples or unmarried couples..



COMMUNITY INVOLVEMENT

Measure of the interest in what's happening in one's neighborhood, city, town, or region. Reflected in activities ranging from reading the weekly community newspaper to socio-political involvement in community organizations.



FINANCIAL CONCERN REGARDING THE FUTURE

The feeling of insecurity about one's financial future, particularly in old age, and of being personally responsible in this area.



TECHNOLOGY ANXIETY

People strong on this construct are intimidated and threatened by technological changes and express high concern regarding the ethical and moral dimensions towards which science is advancing

Social Values Segment 3

COMMUNITY DRIVEN CONFORMISTS (40%)

Who are they?

Accepting of the status quo,
follow the rules, and crave
security

How to gain their support?

Reassure them about the future
Reference trusted authorities
Challenge their discourse

What are the challenges?

Intimidated by change
(challenge beliefs that
economy will lose out)



Social Values

Implications: Emissions cap

The top three messages are the same for everyone; can use a consistent messaging approach.
 Segment 1 also responds to appeal to “global consciousness”.
 However, segment 3 is less convinced – what else can be done to shore up their views?

Top messages	Segment 1 <i>Rational Changemakers</i>	Segment 2 <i>High Energy Hedonists</i>	Segment 3 <i>Community Driven Conformists</i>
Better future: Reducing emissions is not only good for the planet, but will also help Canada transition to a stable and prosperous economy with many jobs in the clean energy sector	High	High	Med
Right thing to do: Canadians & others around the world are already feeling the impacts of cc. It’s time for Canada to do its part...	High	High	Med
Innovation2: Limiting emissions will create incentives for companies to invest in cleaner energy technologies and other ways to reduce emissions, which would create jobs and grow the economy	Med	Med	Med
Right thing/owes to world2: As one of the highest per-capita emitters in the world but also one of the richest, Canada has a responsibility to help the world address this problem by capping...	Med	Low	Low

Social Values

Implications: Emissions cap (pt.2)

Segments 2&3 respond relatively well to messaging about motivating O&G to do its part. Segment 3 also responds to messages addressing their concerns (technology anxiety, discomfort with risk and change).

Other messages	Segment 1 <i>Rational Changemakers</i>	Segment 2 <i>High Energy Hedonists</i>	Segment 3 <i>Community Driven Conformists</i>
Innovation3: O+G companies are making record profits, and limiting emissions will encourage them to invest those profits in cleaner energy technologies & other ways to reduce emissions	Low	Med	Med
Innovation: If Canada requires the O&G industry to limit emissions, they will be motivated to innovate their processes , which is good for our country in the long run	Low	Med	Med
Fairness2: With Canada continuously missing its climate targets, the O&G industry needs to do its part so that we as a country can reach our climate targets	Low	Low	Med
Most realistic option: It's unrealistic that new technology like carbon capture and storage will help us reach our climate targets, so placing limits on emissions is the most realistic and reliable way...	Low	Low	Med
Jobs: An emissions limit will trigger the creation of a huge number of well-paying jobs in decarbonization and clean energy	Low	Low	Med
Oil demand declining: Oil demand will decline around the world by 2030 so limiting emissions may prevent Canadian O&G companies losing out to other countries producing oil with lower emissions	Low	Low	Med

Social Values

Implications: Clean electricity

The top messages are the same for everyone; can use a consistent messaging approach. Segment 2 responds especially well to image-driven messaging and “what’s in it for me?”

Top messages	Segment 1 <i>Rational Changemakers</i>	Segment 2 <i>High Energy Hedonists</i>	Segment 3 <i>Community Driven Conformists</i>
World leader: In Canada, 82% of electricity comes from sources like hydroelectricity...As the world shifts to zero-emitting energy, this is a chance for Canada to build on its success and lead the world	High	Higher	High
Quality-of-life: Electricity is central to our quality of life and modern living, and in Canada we are fortunate to spend relatively little on something so important to our health and safety. It is worth investing...to maintain our standard of living	High	Higher	High
Affordability: Improving Canada’s electricity grid is an opportunity to make energy more affordable by providing all Canadians with access to affordable power from wind, solar and storage technologies	High	High	High
Less energy poverty: An opportunity to reduce energy poverty by giving all Canadians access to energy efficiency programs and affordable power from wind, solar and storage technologies	High	Med	Med

Social Values

Implications: Emissions cap (pt.2)

**Segment 2 responds well to messaging about building on Canada's existing success (image).
Segment 3 also responds to messages addressing their concerns (security/status quo).**

Other messages	Segment 1 <i>Rational Changemakers</i>	Segment 2 <i>High Energy Hedonists</i>	Segment 3 <i>Community Driven Conformists</i>
Willing to pay more: We have some of the lowest electricity rates in the world . Investing in a zero-emitting electricity grid by 2035 is affordable and will ensure all Canadians have reliable access to electricity for decades to come	Med	Med	Med-low
Build on success; competitive Canada: Canada already has a low-emitting electricity system, mainly because we successfully developed hydroelectricity in past decades. Now is the time to finish the job...to keep our economy competitive	Med	Med	Med-low
Just as reliable: Strengthening our electricity transmission network across provinces and adding more renewable energy will be just as reliable as the current power system , but without emissions	Low	Low	Med
Jobs at home: Transitioning our economy to renewables will create good jobs in mining, manufacturing and other sectors and bring supply-chains back home to Canada	Low	Low	Med

Social Values

Overview: Communicating with each segment

	Segment 1 <i>Rational Changemakers</i>	Segment 2 <i>High Energy Hedonists</i>	Segment 3 <i>Community Driven Conformists</i>
How to gain their support?	Provide facts and evidence Include clear calls to action Appeal to global consciousness	Appeal to their FOMO Focus on events/crowds Use aesthetic content	Reassure them about the future Reference trusted authorities Challenge their discourse
What are the challenges?	Aversion to complexity (keep it simple and logical)	Feelings-driven (make topics seem novel and exciting)	Intimidated by change (challenge beliefs that economy will lose out)
Oil & Gas Emissions Cap <i>More convincing messages</i>	Better future, Right thing to do, Owes to the world	Better future, Motivating O&G to do its part	Better future Motivating O&G to do its part Mitigate risk (jobs, missing targets) Playing to technology anxiety
Clean Electricity Grid <i>More convincing messages</i>	World leader, build on success Quality of life Affordability Reduce energy poverty	World leader, build on success Quality of life Affordability	World leader Quality of life, affordability Reliability Jobs & supply chains

THOUGHTS FOR CONSIDERATION

1

There is a top set of messages that appeal across the board BUT...

...Don't forget about the different perspectives (values) of segments 2 and 3. Consider incremental messages that also speak to their way of seeing the world.

2

Preference is for positive framing BUT...

...We know negative messaging gets the attention. How do we make sure these stand out in the “real world” (or the social media world)?

...Remember Canadians are also looking for signs of tangible (effective) solutions. Any messaging will be insufficient without evidence of progress.

QUESTIONS FOR SMALL GROUPS

What findings are most interesting to you? Or most surprising?

Top-of-mind ideas about how you might use some of the findings in your communications?

Does the social values profiling seem useful? If not, why? If so, how?

What more do you want to know, based on the messaging analysis?

(1 rapporteur per group, 60-second report back in main group)

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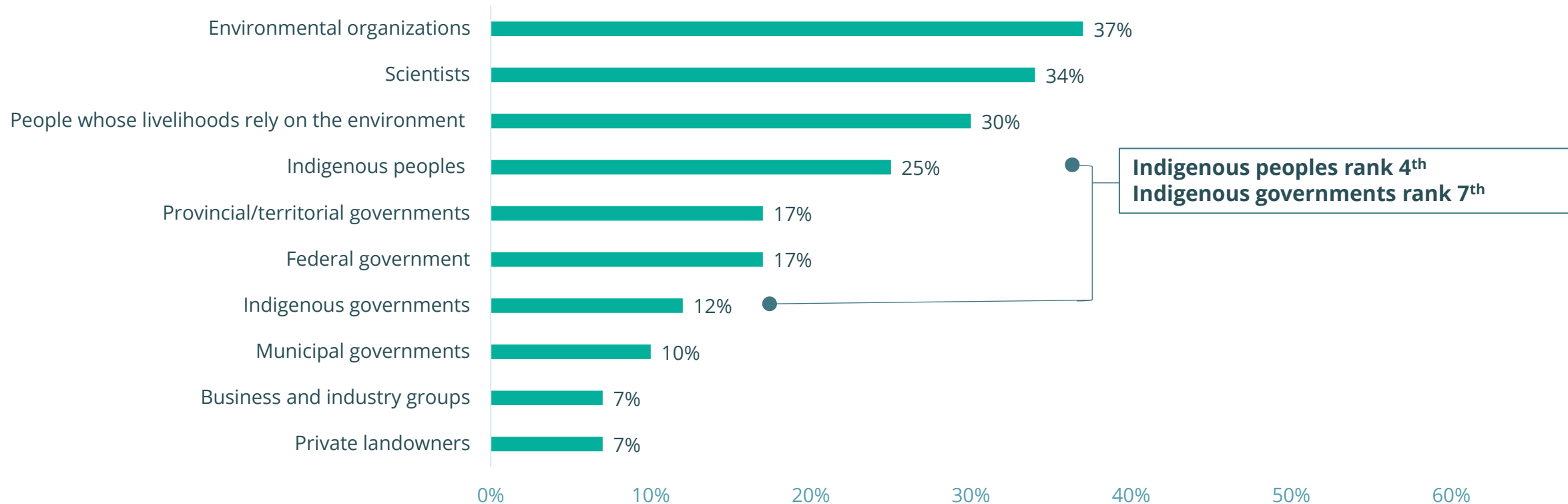
Indigenous-led conservation

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Perceived leaders in protection and conservation

There isn't one clear perceived leader in conservation efforts. However, Indigenous peoples are seen to be within the mix, ahead of all levels of governments but behind eNGOs and scientists.

Q11. Which of the following – if any – do you believe stand out as **demonstrating positive leadership in decisions about protecting and conserving land, freshwater and ocean** in Canada today? Please choose up to 3.



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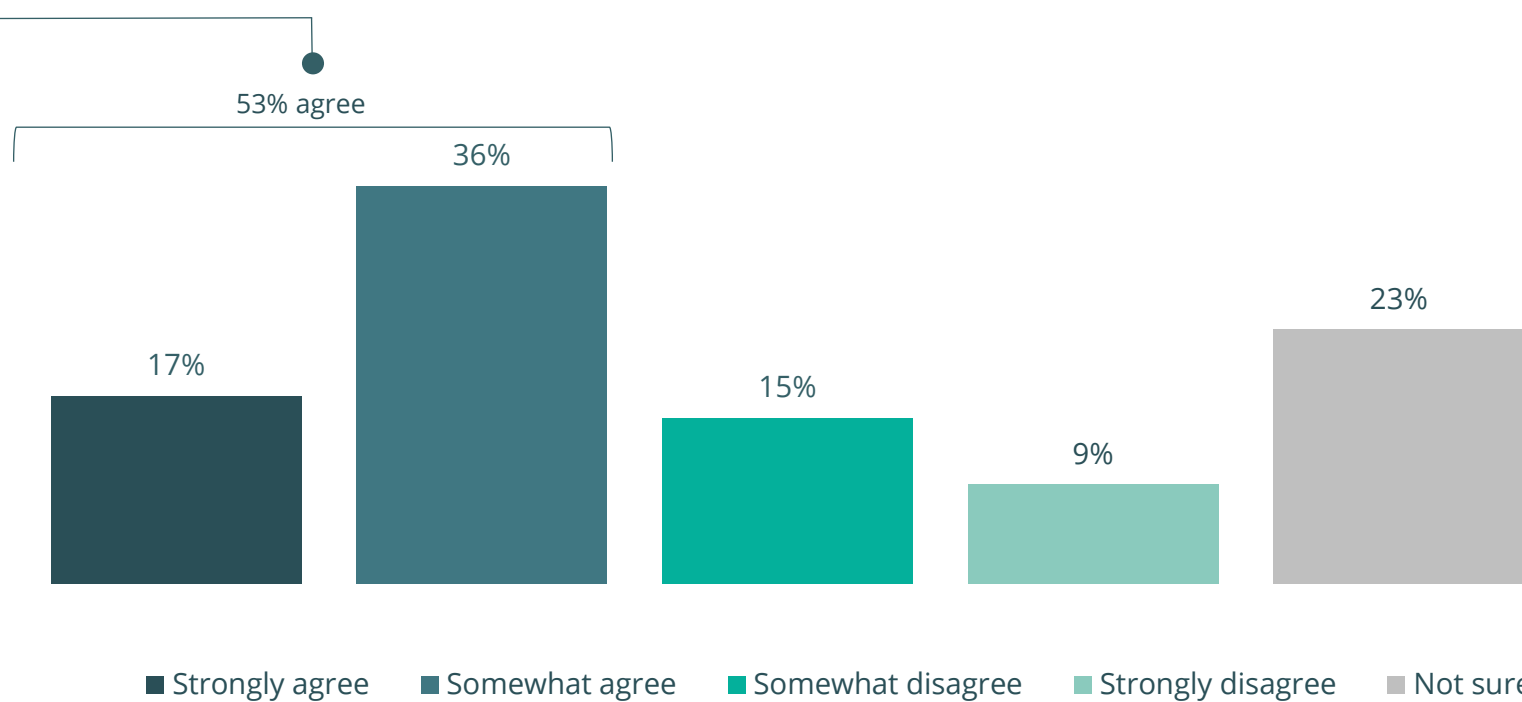
Perceptions of Indigenous conservation knowledge

About half of Canadians perceive Indigenous conservation knowledge as at least equal to Western science.

Q12. To what extent do you agree or disagree with the following statement:
Indigenous conservation knowledge is at least equal to Western science in understanding and protecting nature.

More likely to agree:

- 18 to 29 (62%)
- Under \$150K (54%)
- Left strongly (65%)
- Left leaning (70%)
- Women (56%)
- High concern (65%)

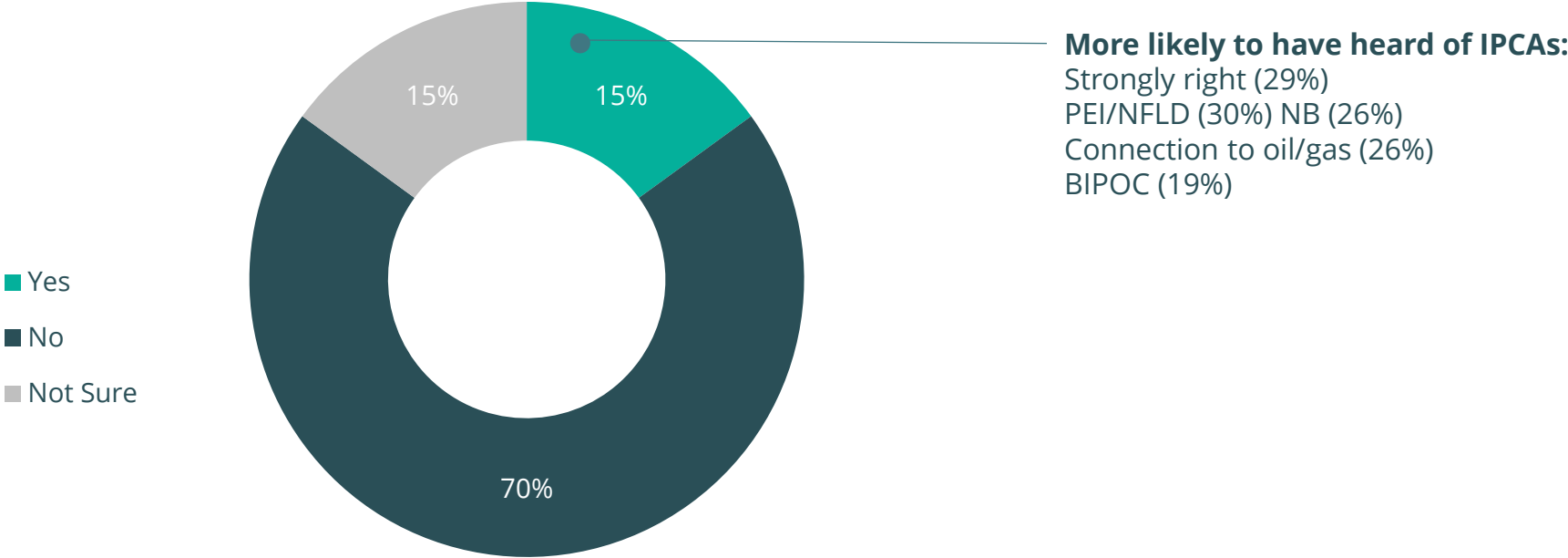


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There is low awareness of IPCAs

Most respondents (seven in ten) have never heard of IPCAs.

Q13. Have you ever heard of Indigenous Protected and Conserved Areas (IPCAs) before now?



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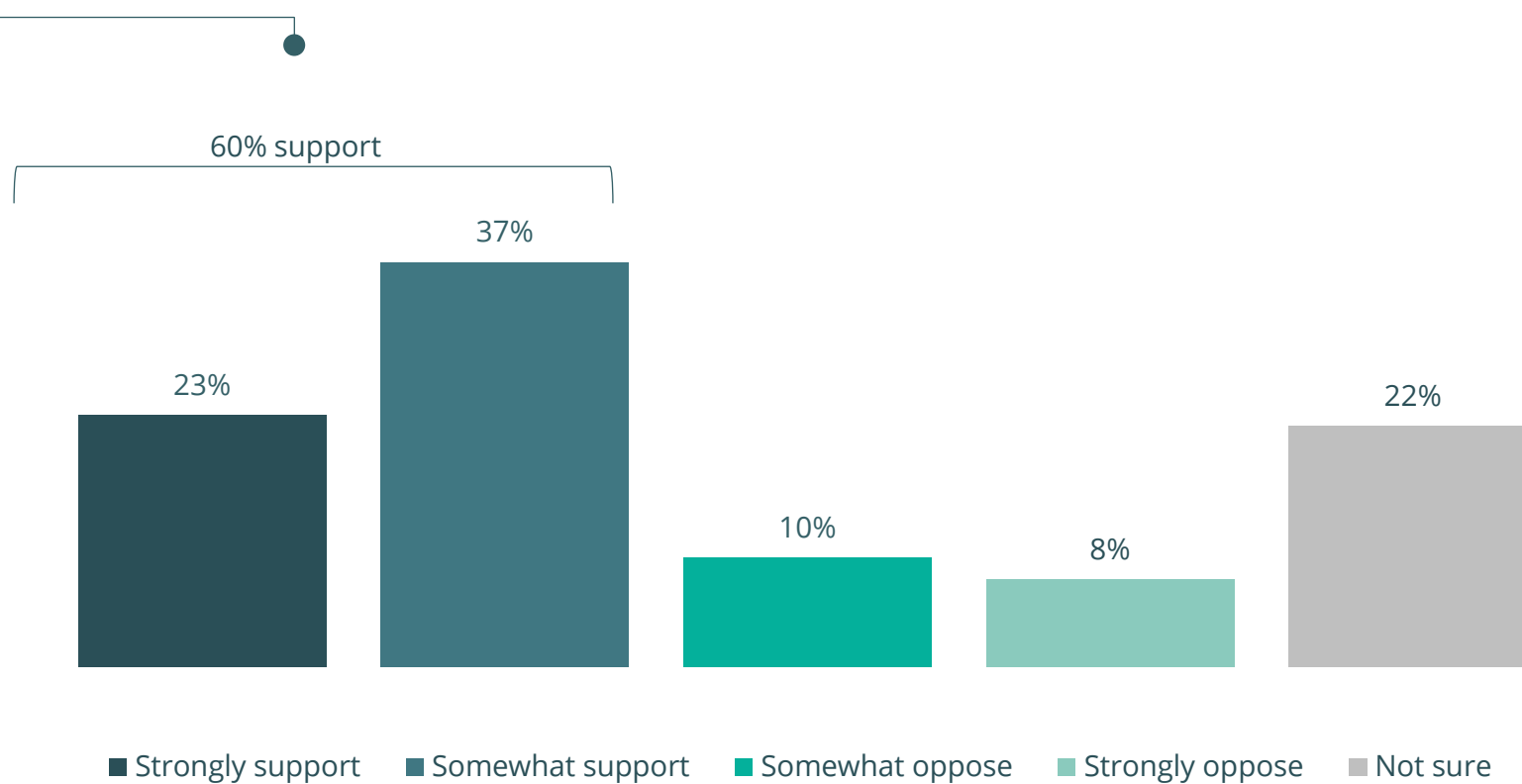
There is modest support for IPCA expansion

Six in ten support expanding IPCAs in Canada, although only two in ten express strong support.

Q14. Indigenous Protected and Conserved Areas (IPCAs) are lands and waters where Indigenous (First Nations, Inuit, Metis) governments have the primary role in protecting and conserving ecosystems through Indigenous laws, governance and knowledge systems. To what extent do you support or oppose expanding the number and size of IPCAs in Canada?

More likely to support:

- 18-29 (71%)
- Post-grad (69%)
- Under \$40K (66%)
- Left strongly (81%)
- Left leaning (79%)
- High concern (75%)



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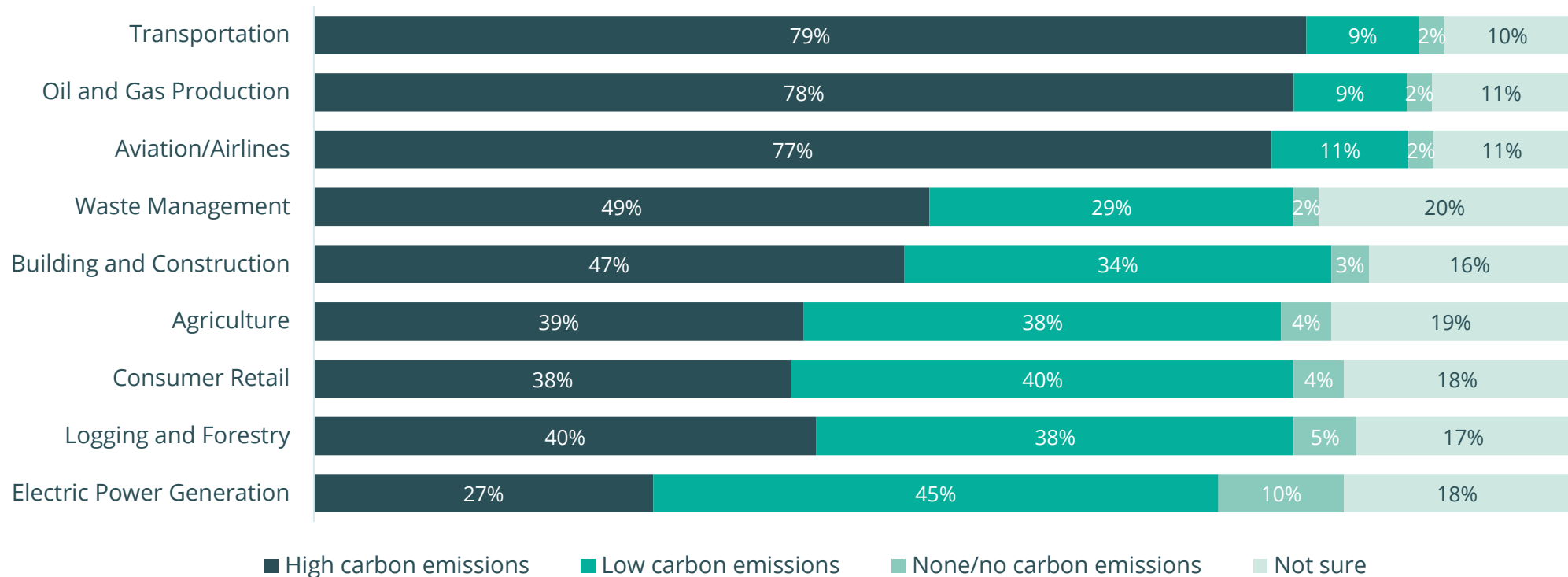
Ad-hoc topics

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The public differentiates the level of carbon emitted by various industries

Transportation, oil and gas and airlines are seen as the most carbon-intensive industries.

Q17-25. What level of carbon emissions do you think is produced by each of the following industries?
(Carbon emissions are greenhouse gases that cause climate change)



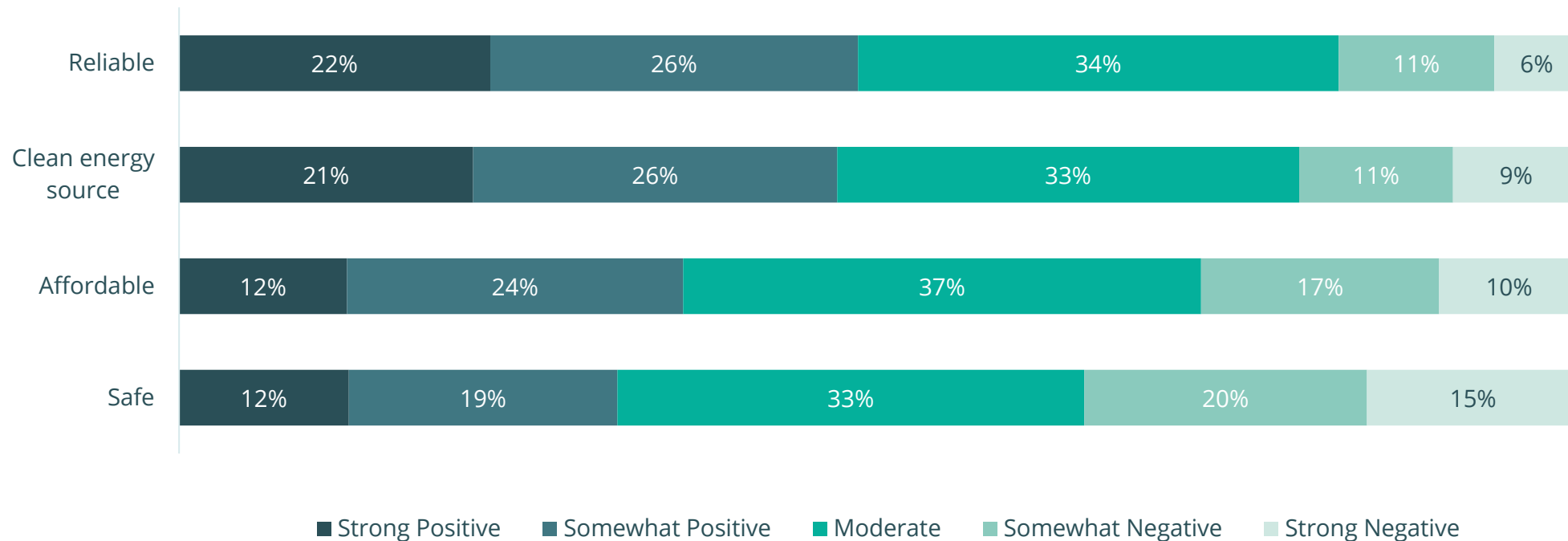
Men, right leaning, those expressing low climate concern, and those with connections to oil and gas are more likely to perceive no/low carbon emissions in general.

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Perceptions of nuclear power

Canadians are more positive than negative about the reliability and cleanliness of nuclear energy; opinions are divided about its safety and affordability.

Q26. Based on what you know or have heard, which of the following best describes nuclear power?

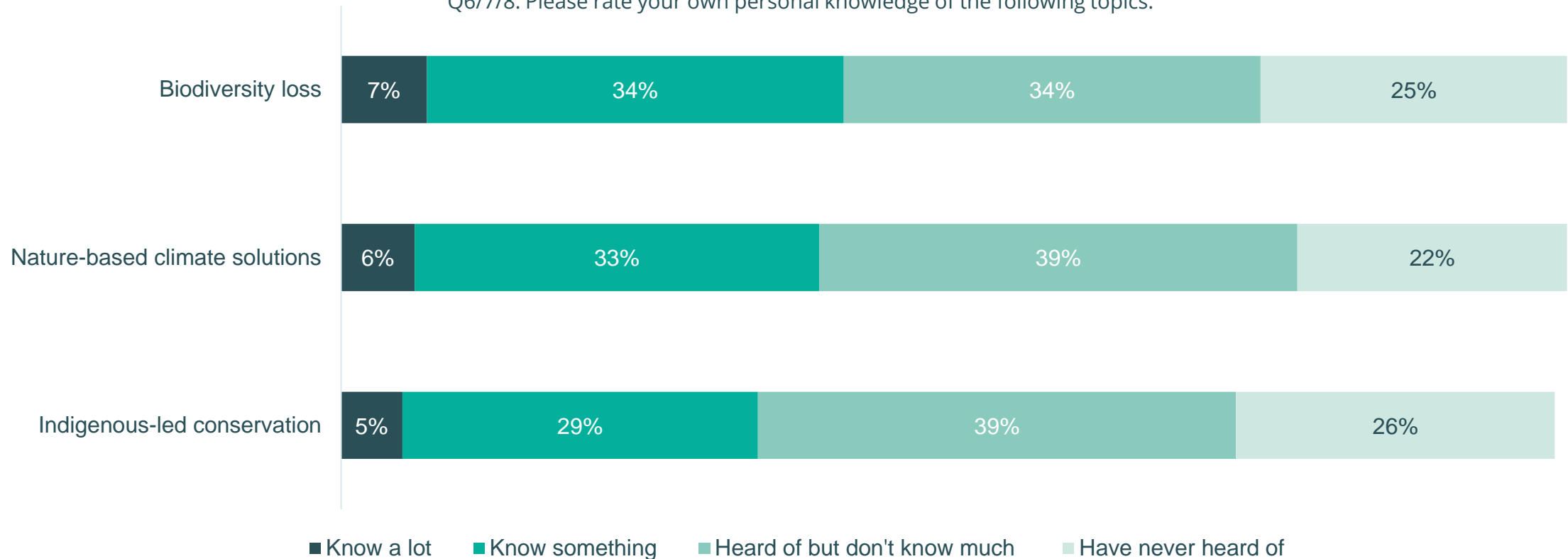


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Relatively few Canada feel knowledgeable about the survey topics

Lack of knowledge is a barrier to communications efforts.

Q6/7/8: Please rate your own personal knowledge of the following topics:



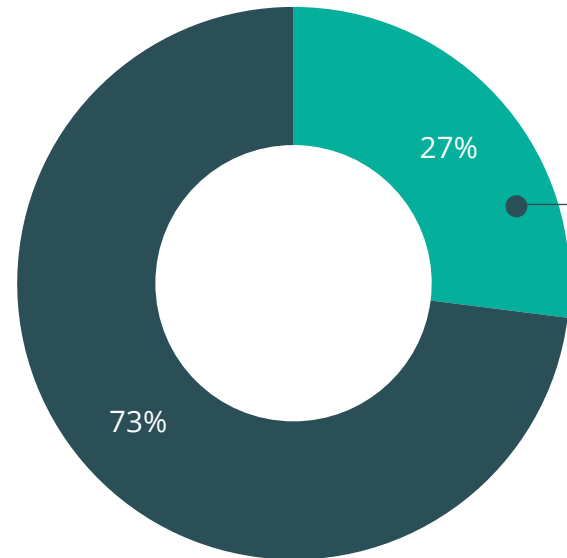
Those with at least a university education and those who have high concern were more likely to report that they “know a lot” or “know something” about each topic.

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Three-quarters feel it is a bad time to buy

With increasing concern over the cost of living in Canada and the possibility of a recession, fewer than three in ten feel it is a good time to make purchases.

Q 27. Considering the cost of things today, as well as your present financial situation, do you think now is a good time or a bad time to buy things you want and need?



More likely to say “good time to buy”:
Income \$150K+ (39%)
Men (31%)

■ Now is a good time to buy ■ Now is a bad time to buy

The last time “good time to buy” was this low was in September 2008. By 2010 and 2011, this proportion had recovered to about four in ten (Source: Environics Institute data).

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One in four owe more than they can afford

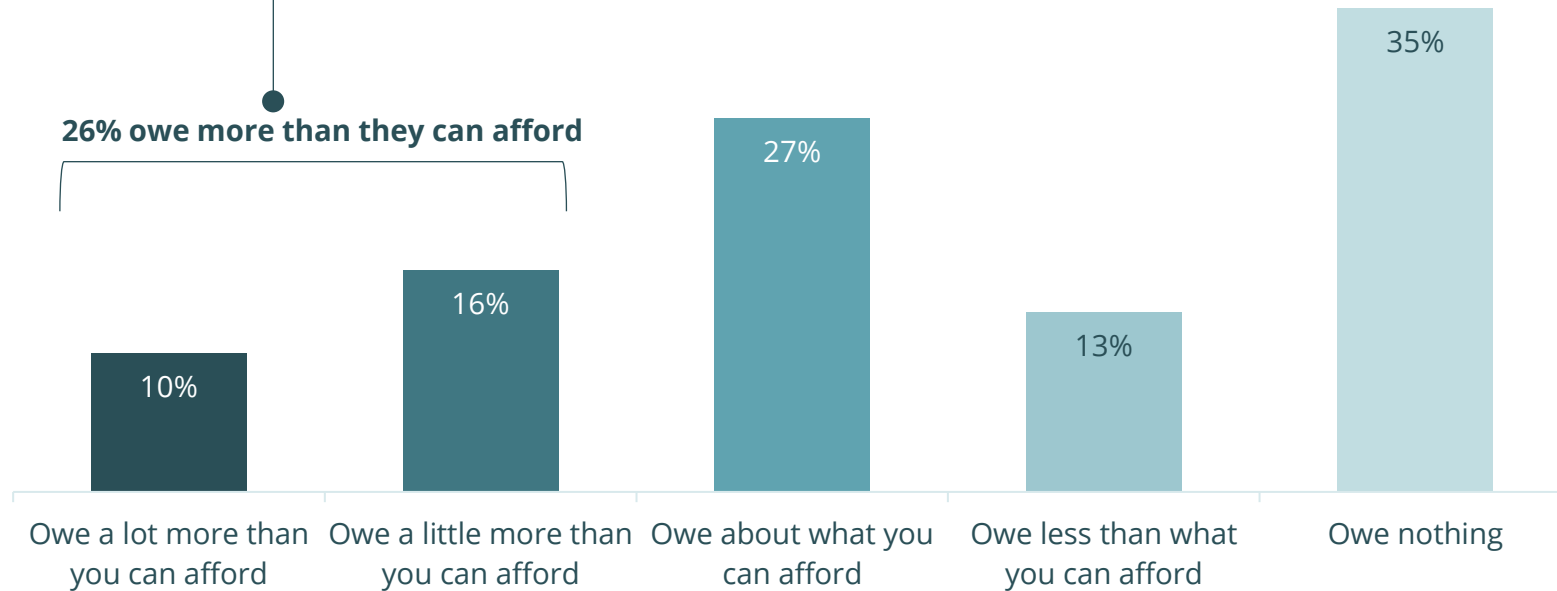
Another four in ten are comfortable with what they owe, while one-third don't have credit/loan debt

Q 28. Thinking about the money you owe on credit cards and loans, excluding your mortgage, would you say you...?

Most likely to owe more:

18-59 (32%)

NS (41%), NB (37%)



The proportion of Canadians owing more than they can afford has steadily increased from 23% in 2020, 19% in 2012 and 18% in 2008
(Source: Environics Institute data).

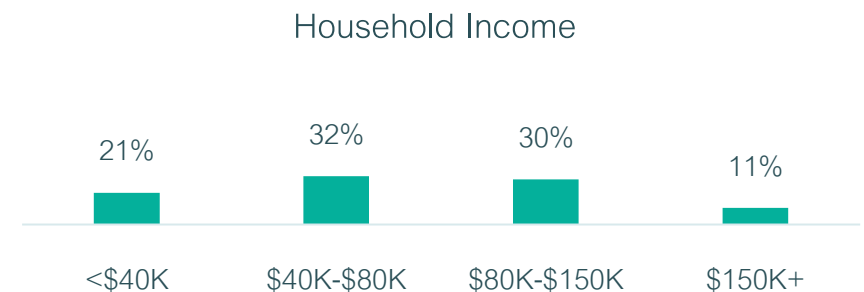
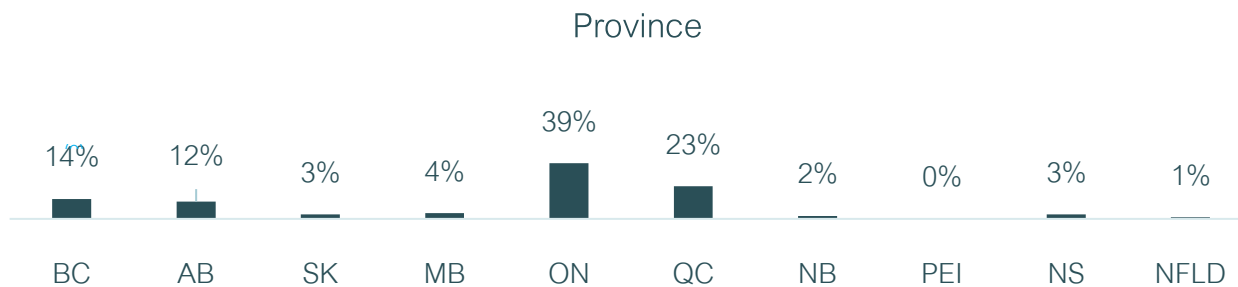
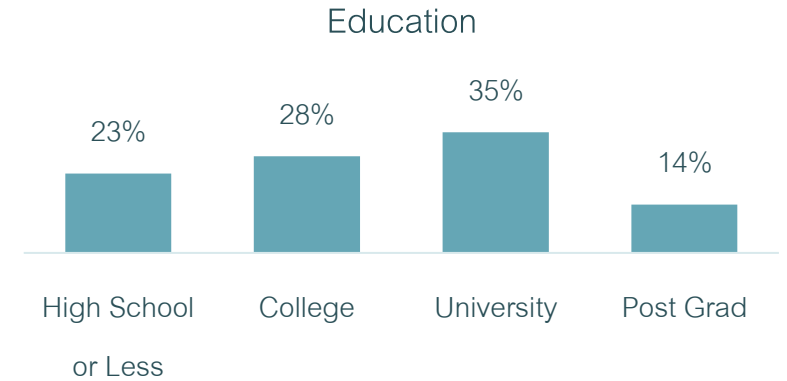
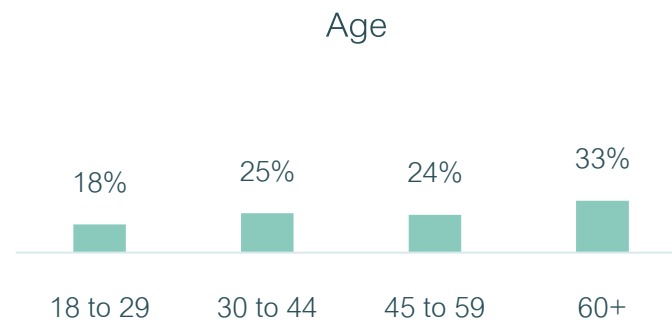
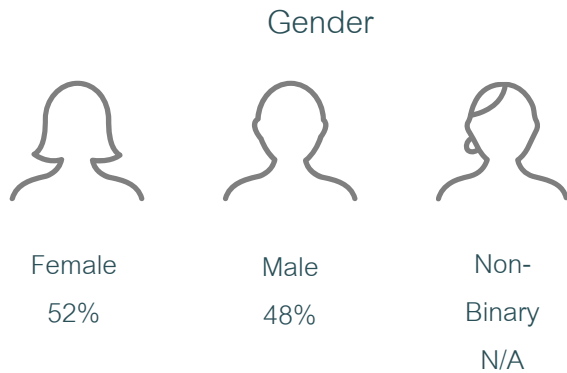
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Demographics

Respondent Profile

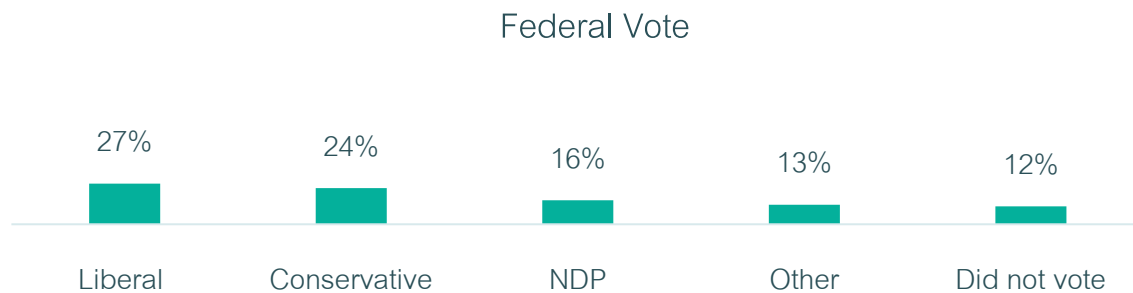
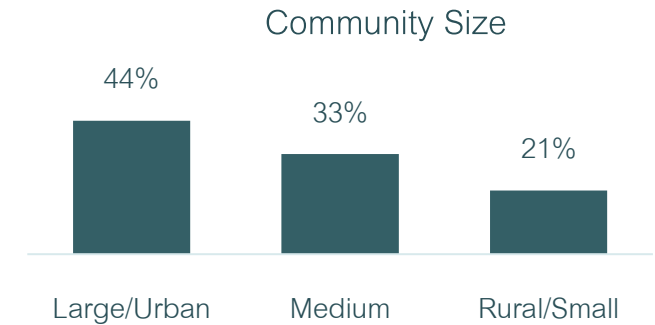
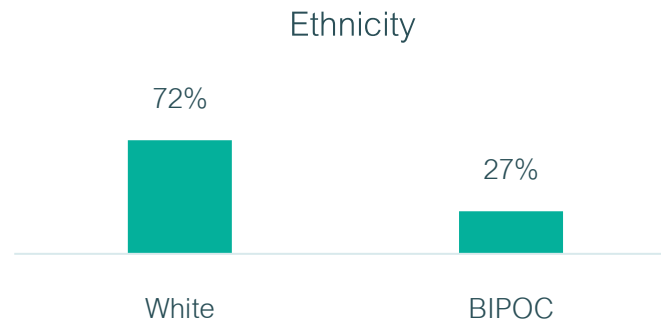
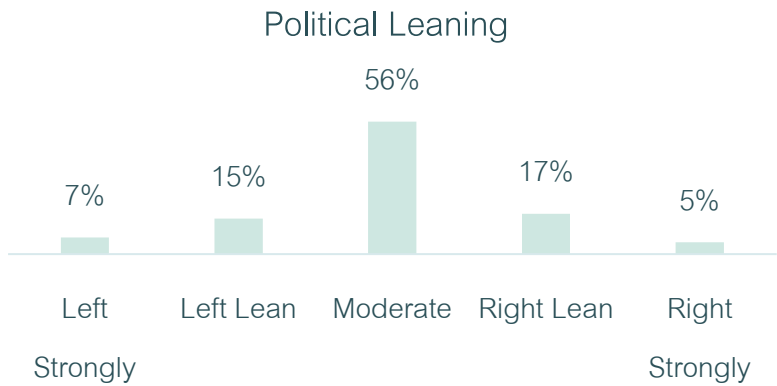
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Respondent profile



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Respondent profile cont.



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Appendix

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Oil & Gas Emissions Cap MaxDiff Results with Full Statements

Q15. Which of the statements listed below is most convincing and least convincing reason to limit and reduce oil and gas industry emissions ? (n= 1,147)

Oil demand will decline around the world by 2030 so limiting emissions may prevent Canadian O&G companies from losing out to other countries producing oil with lower emissions	4.19
An emissions limit will trigger the creation of a huge number of well-paying jobs in decarbonization and clean energy	4.26
With Canada continuously missing its climate targets, the O&G industry needs to do its part so that we as a country can reach our climate targets	5.00
It's unrealistic that new technology like carbon capture and storage will help us reach our climate targets, so placing limits on emissions is the most realistic and reliable way to meet those targets	5.00
As one of the highest per-capita emitters in the world but also one of the richest, Canada has a responsibility to help the world address this problem by capping its O&G emissions	5.40
The innovation and clean technology from limiting emissions means we can transition away from fossil fuels more quickly than would otherwise be possible	5.67
Canadians don't want a vulnerable economy reliant on O&G while the rest of the world moves towards renewables. Limiting O&G emissions would encourage Canada to develop its renewable energy industry	5.82
Limiting O&G emissions will spur innovation in clean technology, leading to cheaper and more sustainable options than O&G	5.89
Limiting emissions from O&G will make Canada less reliant on polluting sources of fuel, which will improve our air quality and our health	5.89
If Canada requires the O&G industry to limit emissions, these companies will be motivated to innovate their processes, which is good for our country in the long run	6.02
O&G companies are making record profits, and limiting emissions will encourage the industry to invest some of those profits in cleaner energy technologies and other ways to reduce their emissions	6.22
Canadians and other sectors are doing their part to reduce emissions while emissions from O&G production continue to increase. It's only fair that the O&G sector do its part by limiting emissions from production	6.24
Canada cannot meet its climate targets without reducing emissions from its most polluting sector. Limiting emissions from O&G production will encourage provinces and territories to work together towards a common goal	6.35
Government has to create rules limiting O&G emissions because companies have shown they won't voluntarily take responsibility for their pollution	6.46
Limiting emissions will create incentives for companies to invest in cleaner energy technologies and other ways to reduce their emissions, which would create jobs and grow the economy	6.58
Canadians and others around the world are already feeling the impacts of climate change. It's time for Canada to do its part in reducing emissions by placing a limit on emissions from O&G production	7.37
Reducing emissions is not only good for the planet, but it will also help Canada transition to a stable and prosperous economy with many jobs in the clean energy sector	7.65

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Clean Energy Grid MaxDiff Results with Full Statements

Q16. Which of the statements listed below is most convincing and least convincing reason for moving to a zero-emitting electricity grid ? (n=1,147)

In Canada, 82% of our electricity comes from sources like hydroelectricity, which is far less polluting than electricity generated from coal, oil and fossil gas. As the world shifts to zero-emitting energy, this is a chance for Canada to build on its success and lead the world	9.04
Electricity is central to our quality of life and modern living, and in Canada we are fortunate to spend relatively little on something so important to our health and safety. It is worth investing in a clean electricity grid to maintain our standard of living in the future	8.51
Improving Canada's electricity grid is an opportunity to make energy more affordable by providing all Canadians with access to affordable power from wind, solar and storage technologies	8.23
Improving Canada's electricity grid is an opportunity to reduce energy poverty by giving all Canadians access to energy efficiency programs and affordable power from wind, solar and storage technologies	7.9
We have some of the lowest electricity rates in the world. Investing in a zero-emitting electricity grid by 2035 is affordable and will ensure all Canadians have reliable access to electricity for decades to come	6.82
Canada already has a low-emitting electricity system, mainly because we successfully developed hydroelectricity in past decades. Now is the time to finish the job and replace the remaining fossil fuels with renewable energy to keep our economy competitive	6.78
Transitioning our economy to renewables will enhance Canada's energy security, as we will be less dependent on other nations that export oil-and-gas	6.45
Strengthening our electricity transmission network across provinces and adding more renewable energy will be just as reliable as the current power system, but without emissions	5.88
Building a zero-emitting electricity grid by 2035 will increase demand for rare earths and metals for batteries and other needs. This is an opportunity for government to plan ahead for stronger environmental regulation in industries like mining, for the benefit of all Canadians	5.85
Transitioning our economy to renewables will create good jobs in mining, manufacturing and other sectors and bring supply-chains back home to Canada	5.77
Planning for a zero-emitting electricity grid by 2035 is an opportunity to consider how much electricity we need for the energy transition, so we can minimize the environmental effects of the mining and manufacturing that support electrification	5.58
Canada needs to rebuild and expand its electricity system so we have a zero-emitting power grid by 2035. We can do this and keep electricity affordable because household bills will go down when we shift to electric transportation	5.57
Canada needs to rebuild and expand its electricity system so we have a zero-emitting power grid by 2035. Power bills could rise in the short-term, but they will fall over time as cheaper renewable energy fills the system and we switch to electric transportation	5.15
Strengthening Canada's electricity transmission network across provinces means we don't need nuclear or fossil gas power to back up renewable energy	4.65
Creating a zero-emitting electricity grid in Canada by 2035 requires national cooperation. This is a big opportunity to bring the provinces and territories together	4.53
Like the railways that helped connect Canada, building a zero-emitting electricity grid by 2035 is a national unity project all Canadians can get behind	3.29

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Social Values Segment 1

RATIONAL CHANGEMAKERS (31%)

Environmentally conscious and willing to challenge the status quo

Who are they? This segment prioritizes environmental protection above profits. They are mindful of the bigger picture and consider what climate change means for the world, creating a sense of responsibility. They value authenticity, make decisions based on logic rather than feelings, and believe that rules do not always need to be followed. Despite this changemaker attitude, they may feel threatened by change and complexity.

How to gain support? Interest in environmental issues is typically already high so they are likely engaged by the current communication strategies. As a rational and logic-driven segment, growing their engagement requires compelling arguments rooted in facts and evidence, as well as calls to action so they know how they can take action.

What are the challenges? Despite their inclination to protect the environment, their aversion to complexity means simplicity is key. Complex, unclear or inauthentic arguments may cause them to disengage. Messaging should focus on one goal at a time and connect the dots.



Social Values Segment 2

HIGH ENERGY HEDONISTS

Emotion driven, seeking stimulation, and personal benefits

Who are they? This segment is curious, however they are not driven by logic and reason. They value their image, want to be part of the in-crowd, and chase intensity and enjoyment. Ecological concern is not much lower than average, meaning its not that they don't care, they just care more about other things.

How to gain support? Drawing this segment's attention will involve making them feel like engaging in climate action is exciting, novel, and personally relevant. Their image-driven focus and FOMO makes them more likely to sign onto (or want to be at the cutting edge) of trending events. Unique takes on climate change and its impacts, and aesthetically pleasing content will be more likely to draw their attention.

What are the challenges? Making this segment care about environmental policies or initiatives can be more challenging since facts and science are unlikely to draw their attention from other priorities. Make the topic unconventional yet cool, and seem in their personal interest, can help them embrace the cause.



Social Values

Segment 3

COMMUNITY DRIVEN CONFORMISTS

Accepting of the status quo, follow the rules, and craves security

Who are they? High acceptance of traditional societal views makes this segment unlikely to challenge authority or the status quo. Technological advancements intimidate them because these changes can make ethical and moral norms feel less defined. However, community involvement, even through online communities, can help them feel more grounded. The need for financial security often drives decision-making, especially among young adults starting their lives.

How to gain support? Leverage their community involvement and access them through the channels and organizations they are already involved with. This could involve engaging in debates/discourse on public forums to challenge their perspective on environmental issues and find common goals (i.e. security, affordability, reliability).

What are the challenges? Climate action will involve changes to the status quo which may intimidate this segment. The message that environmental initiatives can bring stability and long-term benefits over time could help ease their hesitancy. However, they need more proof to believe that environmental initiatives can create economic benefits like spurring job growth and increasing affordability.

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