



Mapping Canada

Findings from the CA-MAP National Segmentation Survey

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 EcoAnalytics

A project of
 MakeWay

Game plan

- Context: Project objectives
- Methods: Segmentation 101
- Results: Canada's Five Persona Profiles
- Common ground: Areas of agreement
- Politics, issues and potential coalitions
- Reaching the segments
- Discussion: Next Steps

Objectives

- Values-based segmentation focused on middle- and working-class Canadians to improve understanding of Canadian population at national and regional levels
- Identify value predispositions across segments and develop messages and messengers to test in focus groups
- Identify patterns that emerge across regions, in second webinar
- Improve understanding of sub-segments (TBD, e.g. small-c conservatives, rural/age cohorts), in third webinar
- Develop short battery of questions for segmentation in future EcoA research and members' campaigns
- Assist members and campaign allies to identify potential voting coalitions, and mobilize potential supporters by appealing to their interests in an effort to get out the vote in future elections

Methods

- Pre-test of several value batteries (October 2023)
 - Online sample of 935 Canadians from BC, AB, QC and ON
 - Tailor items from UK/USA for Canadian survey; determine which are most predictive in segmentation
- National online survey (195+ questions; Nov. 20–30, 2023)
 - Online sample of 6,142 Canadians with at least 1,000 from (BC, AB, SK/MB, ON, QC, ATL)
 - Education quota to ensure large working-class sample (1,175 with high school or less; 1,135 with some college; 1,387 with college or technical degree)
- Follow-up focus groups with Re.Climate will drill deeper (February 2024)
 - Drawn from the national online sample and filtered by segment assignment
 - Drill down into target audiences, test assumptions, test messages and messengers

What sets this segmentation apart?

- **Size** of sample (n=6,142); power to dig deeper into middle class (n=2,463), french-speaking (n=1000) working class (1,034), right-leaning (1,789), immigrants (1,020), aged 65+ (1,434), rural Canadians (937), youth (846)
- Segmentation reveals broader set of political/social **values** that shape climate opinions and be activated
- Upcoming segmentations will delve into the unique social-political-environmental characteristics of different segments across six **regions**, revealing regional distinctions in values and policy preferences
- Broader scope of policy issues examined, allowing for a better picture of possible **coalition** formations that may be mobilized by specific issues, or identifying segments that may be mobilized by different messengers
- Development of a **short battery** of questions for segmentations in future EcoA and members' work.

Five value personas

Ranked by level of engagement on climate change, high to low



Progressive activists

15%



Civic nationals

21%



Centrist liberals

20%



Disengaged middle

30%



Fossil fuel conservatives

14%

Percentages indicate
proportion of respondents
in each segment

Segmentation criteria



Climate beliefs

Emotion

Identity

Political and
social values

Why political and social values?

Risk perceptions are influenced by worldviews and values; frame messages as appeals/threats to values, such as:

Individualism: freedom, autonomy, free-markets and individual choice

- Nature: resilient and always returns to equilibrium, no need to put constraints on individuals to protect it
- Institutions: promote freedom and autonomy (e.g., free-markets)
- Sensitive to risks that limit markets and individual autonomy, (e.g., regulations in support of climate change)
- **Frames to try:** Distributed energy systems, empowering individual households, off-grid communities, etc.

Egalitarianism: sense of community, equality and shared responsibility

- Nature: fragile, delicately balanced, so must be protected
- Institutions: promote equality and social cohesion (e.g., participatory democracy)
- Sensitive to threats to social justice and fairness, (e.g., capitalism and free-markets causing climate change)
- **Frames to try:** Corporations fueling climate change, destruction of nature, inequality. Fair policies that rein in corporations, promote equality, compensation.

Hierarchism: authority, tradition and social order.

- Nature: well-ordered hierarchical system operating by predetermined rules, precariously balanced, requiring experts to maintain stability.
- Institutions: reinforce hierarchical structures, maintain order, and provide well-defined rules (e.g. bureaucracy).
- Sensitive to risks that disrupt, challenge authority / traditional values: e.g., climate change is seen as a risk to economic security, status quo.
- **Frames to try:** mismanagement of resources fuelling climate change; strong leadership to enforce regulations that protect people and communities from disruption of social order, traditional cultural or moral values, and economic instability.



Progressive activists

15%

Ready for you to mobilize

Characteristics

- More likely to be younger, female, upper middle class, university educated and higher income, city folk – many in BC
- Least car-dependent, least likely to be a parent, less likely to work in private sector; a majority work in the public and non-profit sectors
- Concerns: health, climate, and inflation, in addition to a range of social justice issues and hate/misinformation spread online
- Trust (in order of degree): scientists, doctors, friends and family, and environmental NGOs
- Most politically engaged of all segments (most likely to vote, share political content online, etc.)
- Value-aligned, opinionated, proud, cosmopolitan and environmentally conscious
- Most likely to vote for federal NDP followed by the LPC; most likely to vote strategically (40% consider voting for more than one party)

Narrative to test

Climate change is caused by hyper-consumption and greedy oil and gas corporations and their allies. These private interests and governments that facilitate them, as well as supporters of the status quo, are pushing our environment to the brink. The heroes are ENGOS and social groups that challenge these destructive companies and advocate for a clean energy transition.



Civic nationals

21%

Engageable at the community level

Characteristics

- Concentrated in Ontario, Quebec and Atlantic provinces
- Likely to be older, female, with lower incomes and high-school education, community-minded and value service to others
- Relatively car-dependent, but enjoy outdoor activities (e.g. hiking, hunting, fishing).
- Concerns: affordability/inflation, health, hate and misinformation online, climate change/extreme weather, high immigration levels
- Value conflicted, with strong tendencies for both egalitarianism (preference for equality) and nativism (preference for established Canadians over immigrants)
- Trust (in order): friends and family, doctors, and scientists
- Politically at the centre, alienated (low favourability levels for all parties), highly variable vote choice (split between CPC, LPC and NDP in that order), one in five are undecided

Narrative to test:

Climate change is caused by unregulated markets and profit-driven corporations that break the rules to benefit themselves. Government has not properly managed the economy, keeping corporations in line and allowing for sustainable economic and population growth, without wrecking the environment. We need to implement solutions to climate change that experts advocate, before it disrupts the health of more communities and upends cherished Canadian customs, traditions and symbols.



Centrist liberals

20%

Less engaged, but sympathetic to environmental movement

Characteristics

- Gender-balanced, and more likely to live in Quebec
- Lower income than Progressive activists (PAs), concentrated in middle class, share progressive values, optimistic, solutions-oriented, though less likely than PAs to want to disrupt the economic system
- Concerns: health, inflation, civil liberties, discrimination and inequality, hate and misinformation online, climate change
- Slightly left of the political centre, yet liberal in tendency (favouring free markets and immigration)
- Trust (in order): doctors, friends and family, and scientists
- Politically, to the left of Civic nationals, more likely to vote for LPC or NDP, though one in five are open to voting for more than one party.

Narrative to test:

Climate change is a threat to public health and social equality. The solutions are many and include allowing free markets and competition to generate innovation and new technologies to reduce emissions. Canada can be a leader in a clean technology revolution, spurring Canadian economic growth in this century.



Disengaged middle

30%

Least likely to be engaged in political issues, neutral

Characteristics

- Most common segment in Alberta, though also prominent in Ontario, Manitoba and Saskatchewan, as well.
- Gender-balanced, slightly younger and more likely than other segments to be non-white
- Most identify as working or middle class, have high school or technical training; more likely than other segments to have children
- Like Fossil fuel conservatives less likely to work in public sector or belong to unions; fairly religious
- Concerns: health and inflation, hate and misinformation online, conspiracy theories and artificial intelligence
- Trust (in order): friends and family, and (to a lesser extent) doctors and scientists
- Centre/centre-right, less likely than Civic nationals to have authoritarian and nativist opinions, though some in this segment do.
- Only 50% would "definitely" vote if a federal election were held tomorrow, most likely for CPC (and to a much lesser extent, LPC)

Narrative to test:

Climate change is threatening the livelihood of working-class Canadians, who are disproportionately affected by climate change impacts. *Later is too late*: climate change is a moral issue and we owe it to our children to invest in solutions now, and build a brighter future for all Canadians.



Fossil fuel conservatives

14%

Least likely to engage in environmental issues

Characteristics

- One in five live in a rural or remote area, in Alberta and Ontario mostly.
- More likely than any other segment to identify as male (61%) and white (83%); majority is high school or college educated, higher income than Disengaged middle and the most religious.
- Most car-dependent of segments, staunchly conservative, half are unsympathetic or actively opposed to goals of the environmental movement
- Strong predispositions toward authoritarianism and hierarchism
- Concerns: World Economic Forum, socialism and AI as threats to Canadian society
- Trust (in order): friends and family, Canadian oil companies, doctors to some extent; distrust ENGOs, UN, federal government, etc.
- Politically to the right, the vast majority say they would vote for the CPC if a federal election were held today

Narrative to test:

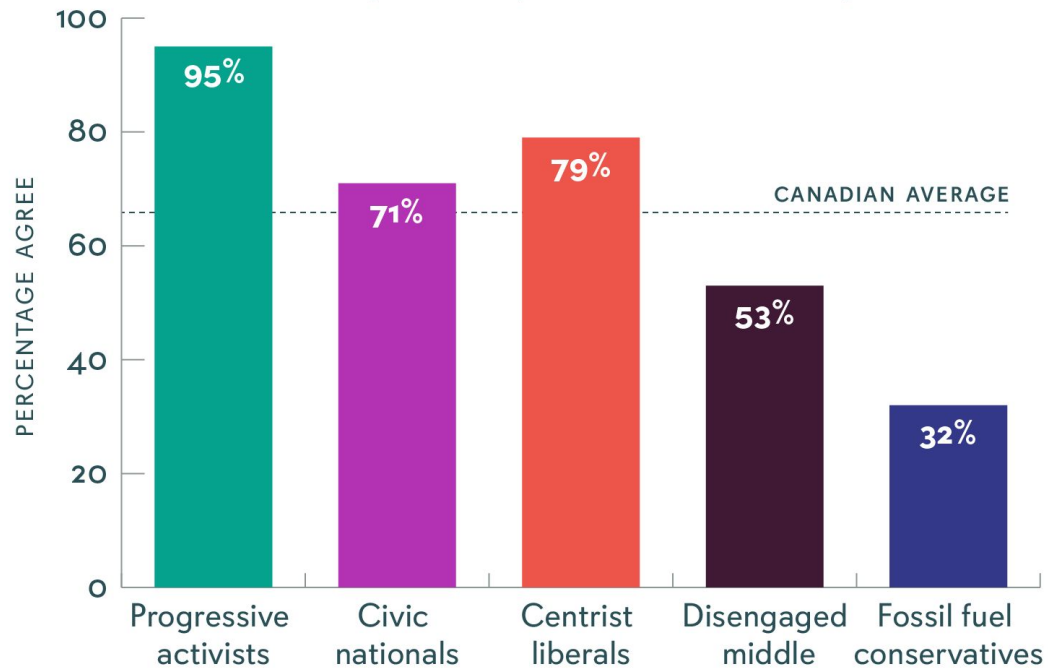
Foreign corporations are taking more than their fair share of our resource wealth. We need strong leadership to boost Canadian-led resource development, seizing opportunities in the mining of rare minerals and manufacturing of 21st technologies.

Value differences among segments

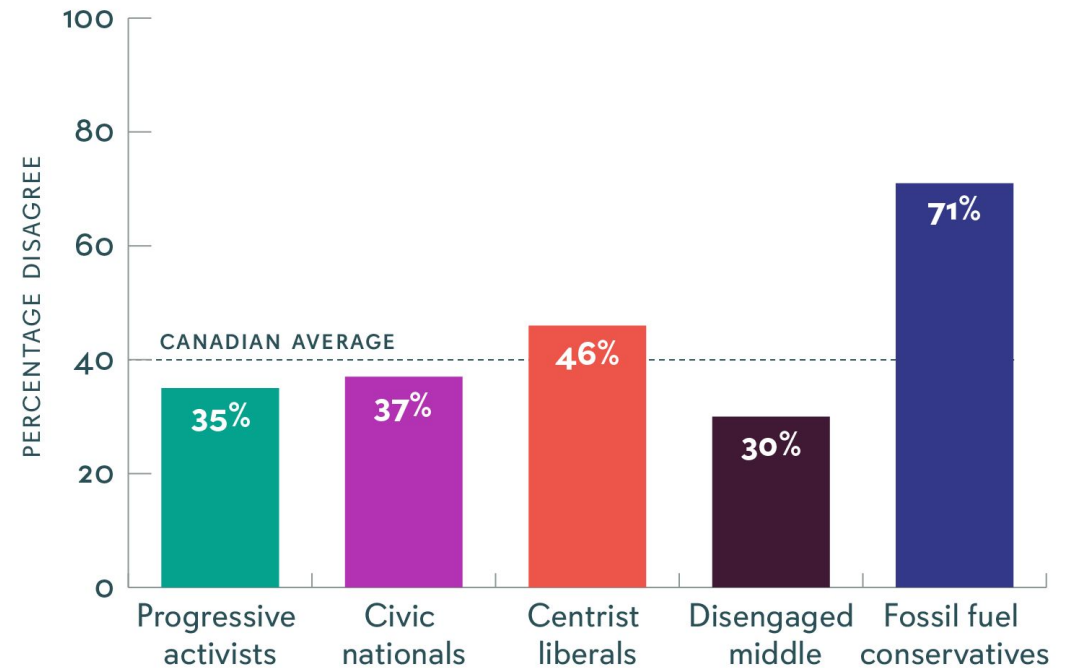
Egalitarianism – Free-market ideology

Egalitarian values predict preference for climate action; free-market ideology correlates with climate-change denial

Agree/Disagree: Discrimination against minorities is still a very serious problem in our society



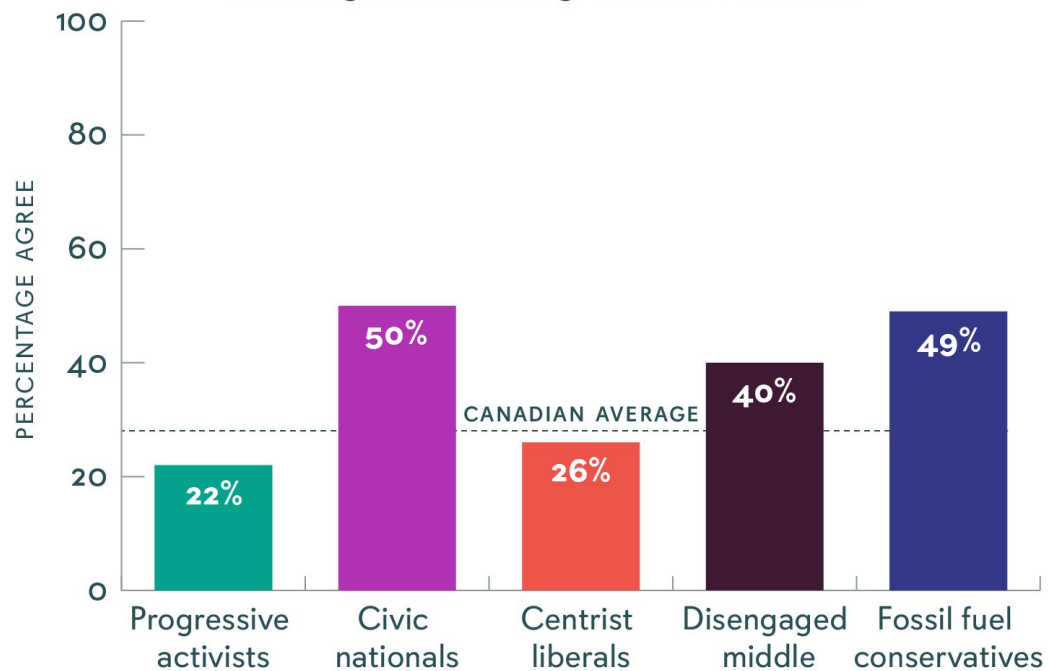
Agree/Disagree: Government ownership of industry should be increased



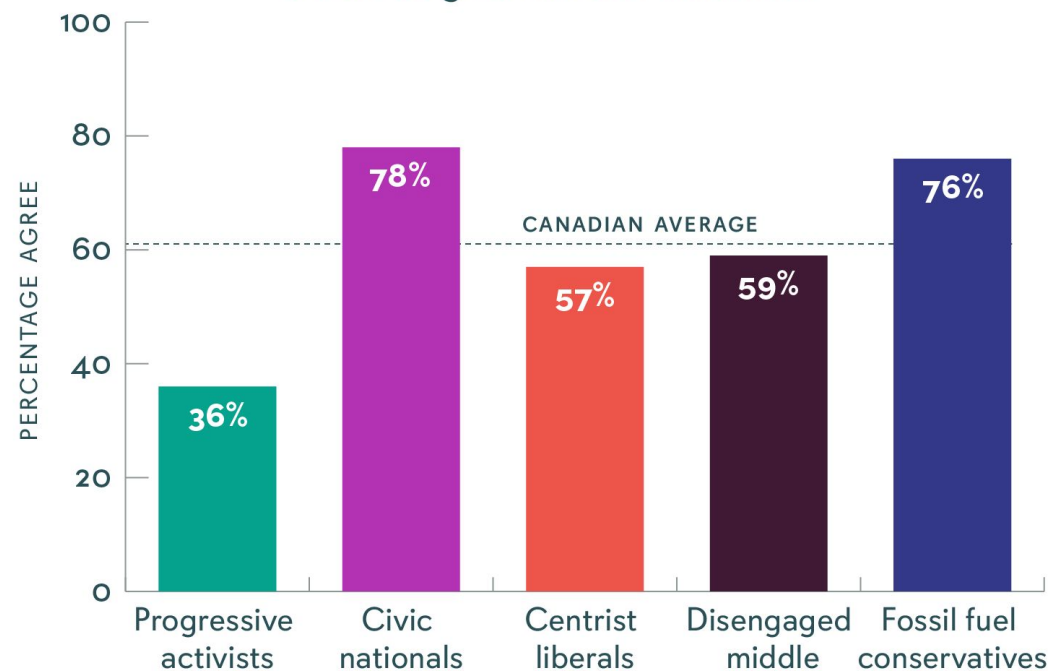
Authoritarianism

Use Canadians' desire for strong leadership and law and order to hold fossil-fuel sector accountable

Agree/Disagree: To fix the country we need a strong leader willing to break the rules



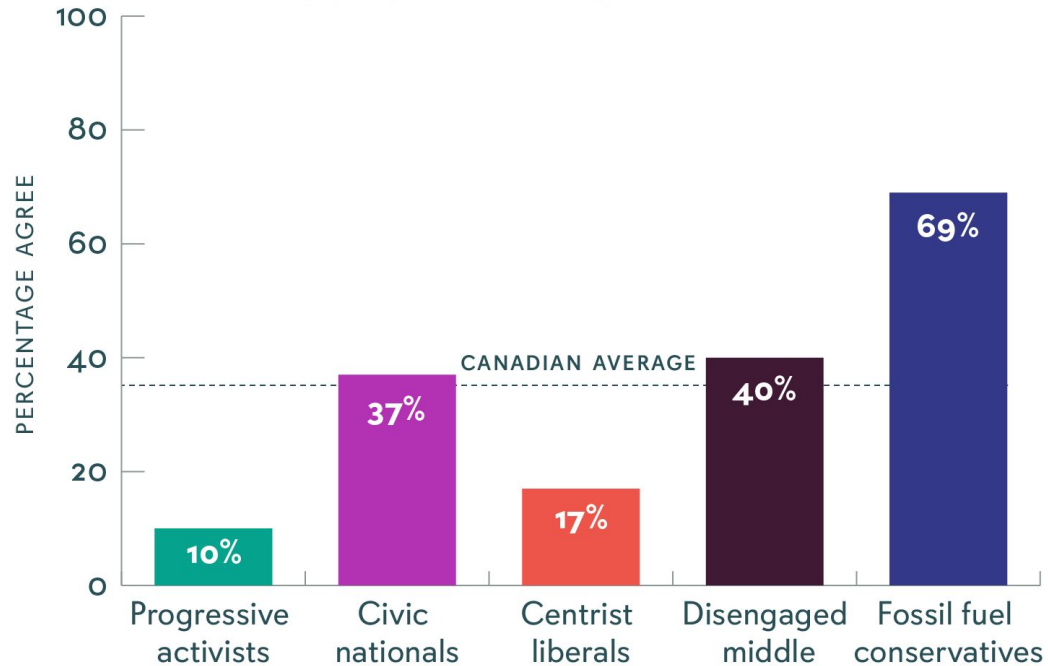
Agree/Disagree: People who break the law should be given harsher sentences



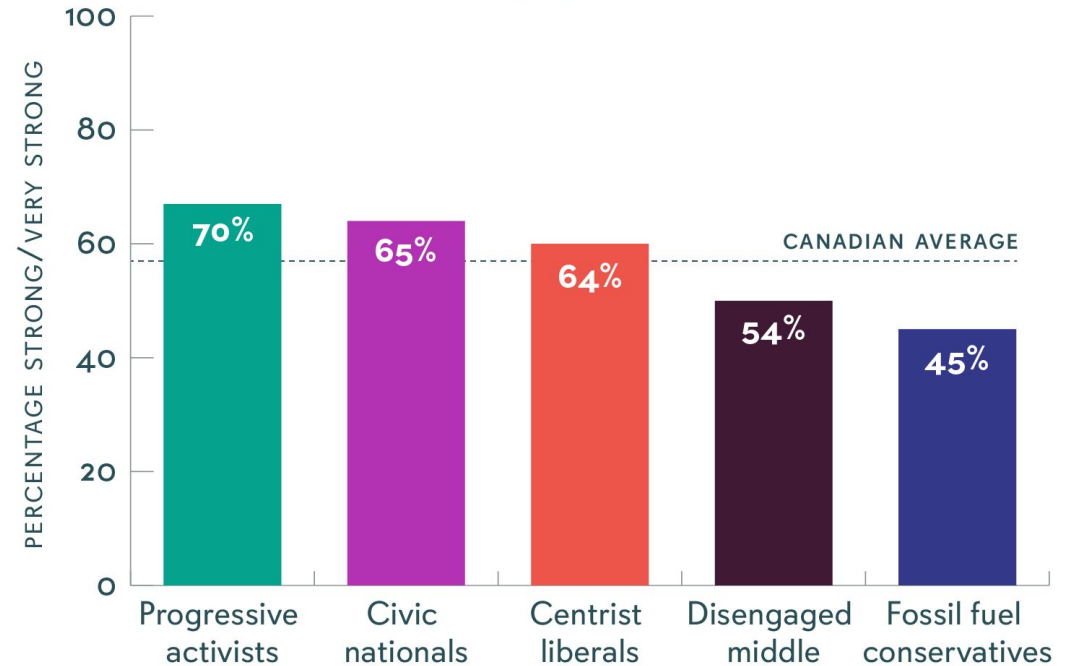
Populism - Nationalism

Choose messengers wisely and test progressive, nationalist narratives

Agree/disagree: I'd rather put my trust in the common sense of ordinary people than in experts and intellectuals

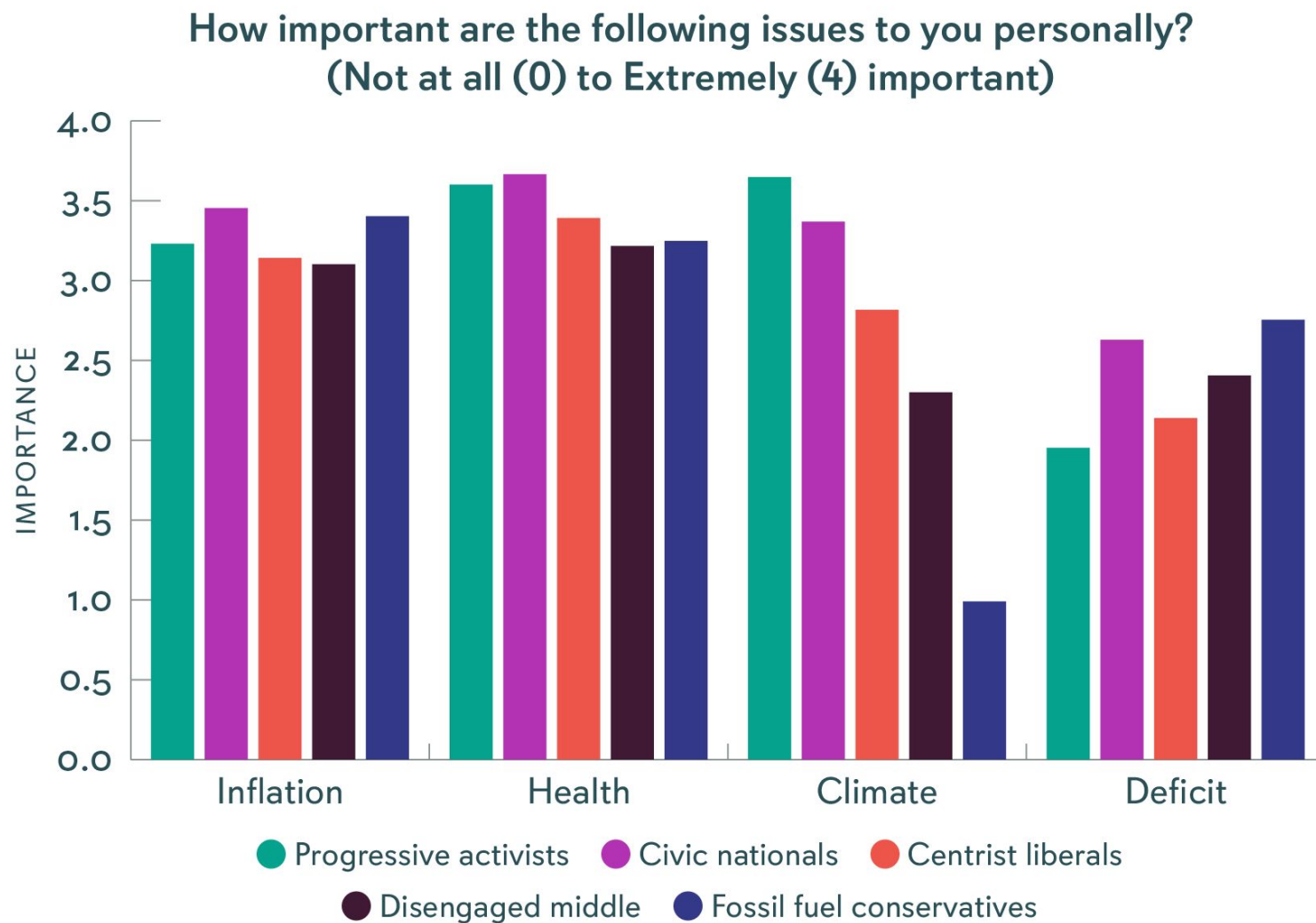


To what extent do you feel a weak or strong sense of belonging to... "Canada"?



Climate change salience across segments

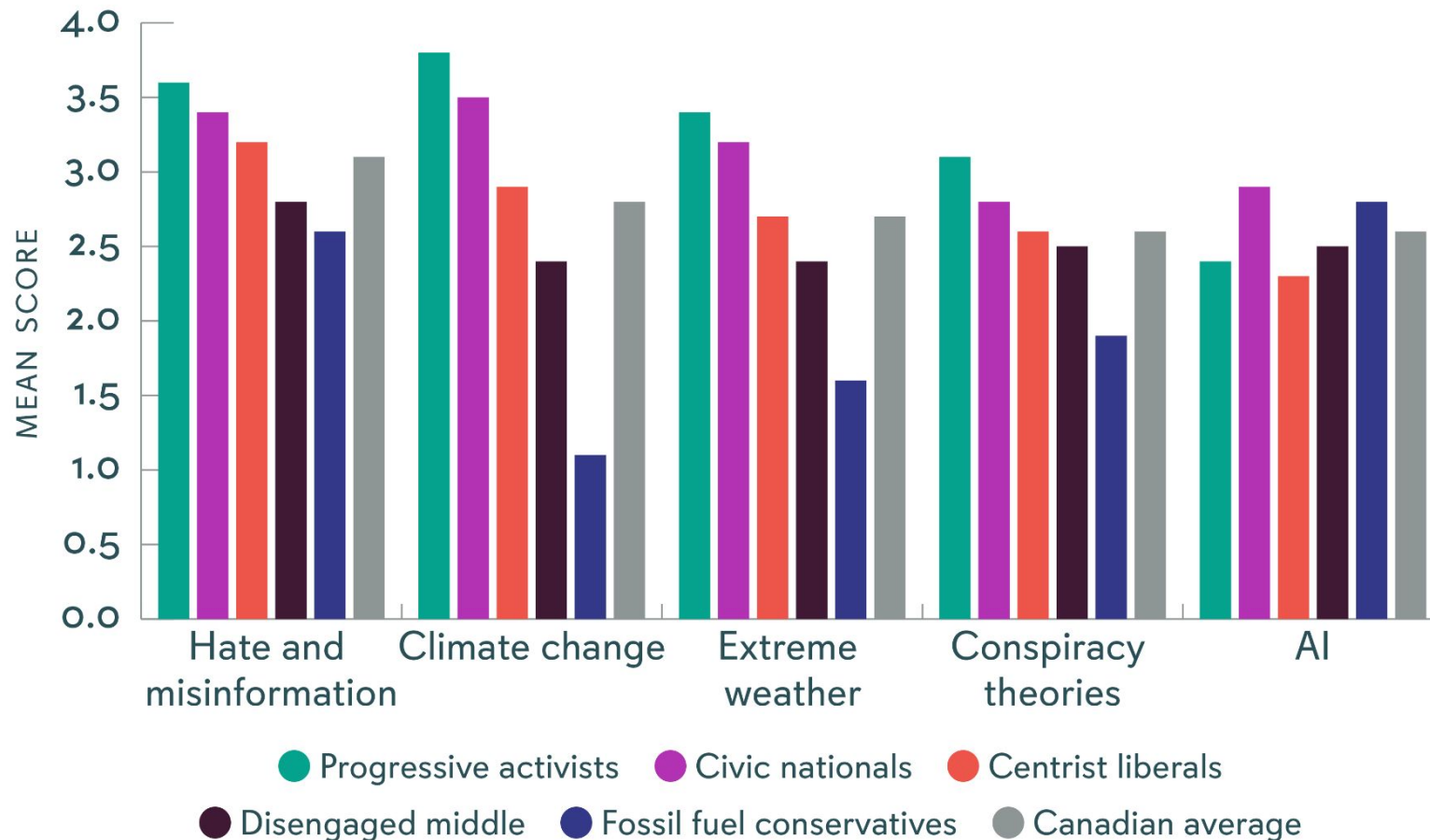
Civic nationals care about climate change nearly as much as Progressive activists



Perceived threats by segment

High concern across segments about hate, and misinformation

How much of a threat, if any, do you think each of the following poses to Canadians and to the healthy functioning of society in Canada?



Takeaways: activate progressive values

Target audiences

- Primary: Progressive activists, Civic nationals and Centrist liberals,
- Secondary: Disengaged middle—elusive, yet the largest segment with the greatest potential to shift its (soft) opinions

Appeal to the egalitarian worldview of primary audiences

- All sensitive to egalitarian themes (e.g. fairness and redistribution), which have been used to attack climate policy. So emphasize the different ways that climate change, and the villains who cause it, threaten an egalitarian worldview. Promote narratives about:
 - Profit-driven, anti-social corporations and governments fuelling climate change.
 - Foreign-based fossil fuel companies posting record profits and fuelling inflation at the expense of millions of hard-working Canadians.
 - The status quo is deepening inequality while also disrupting the balance of nature
 - Human impacts of climate change, through the voices of Canadians in communities across the country that have been devastated by fires and flooding – and the unequal distribution of impacts on women and other marginalized groups.
 - Pollution pricing paid by corporations (rather than consumer pricing);
 - Climate solutions that produce egalitarian outcomes, like investment in infrastructure to address fairness principles.

Tailor leadership messaging differently for different reachable segments

- **Civic nationals:** desire for strong leadership may translate into a desire for more government action against large corporations taking more than their fair share. (Remember many Canadians have a weak sense of agency and question government efficacy).
- **Centrist liberals:** by contrast, may prefer strong leadership frames that highlight private sector innovation and the individualized benefits of distributed energy systems may resonate more with free-market values held by this segment.

Frame messages that activate progressives' pride in their country

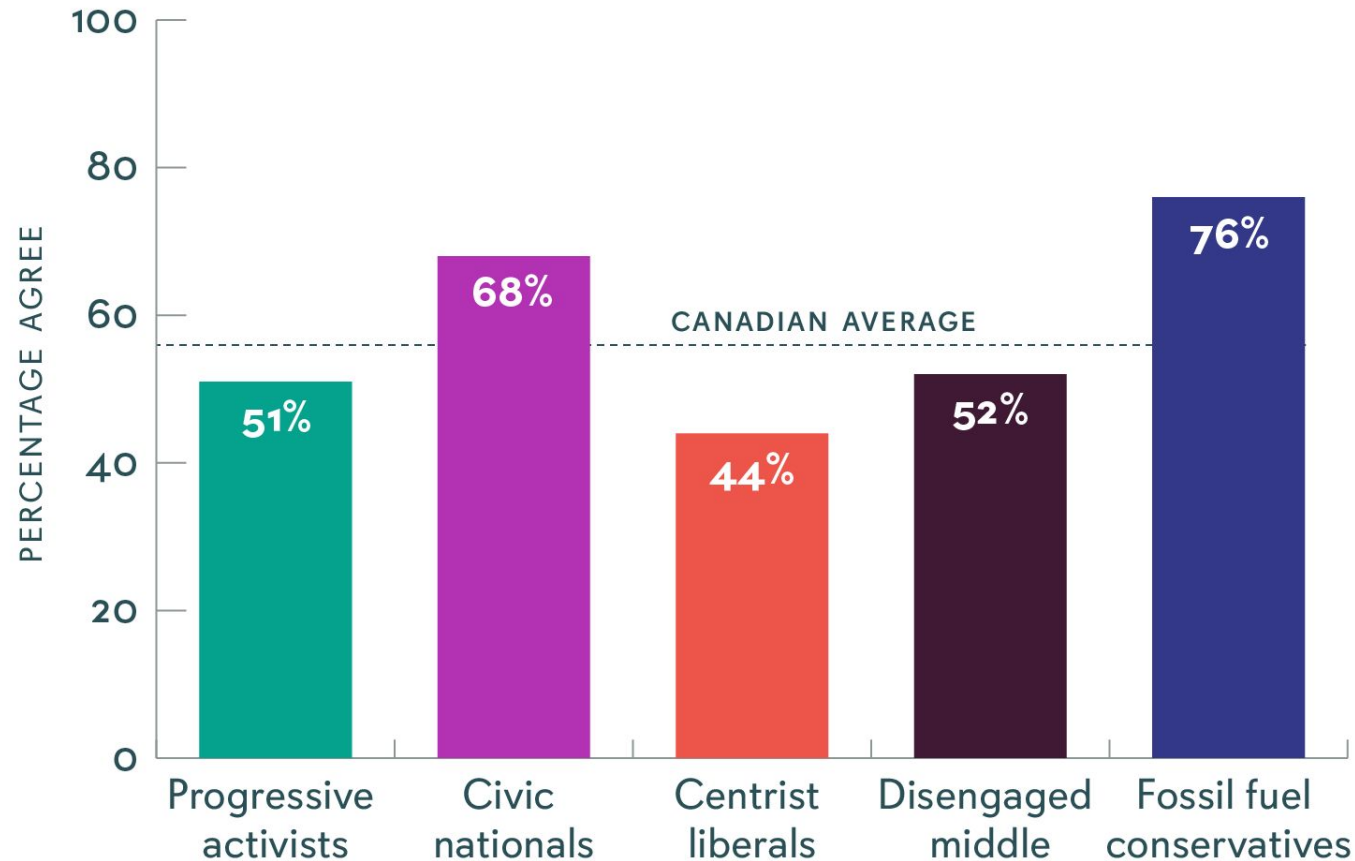
- Highlight “Canadians” and “Canadian communities” as well as symbols evoking pride in Canada’s natural beauty and its protection.
- Try out frames around Green nationalism, as these have proven powerful in Quebec, unifying different segments.

Areas of common ground

Foreign control of natural resources

Majority feel foreign companies have too much control

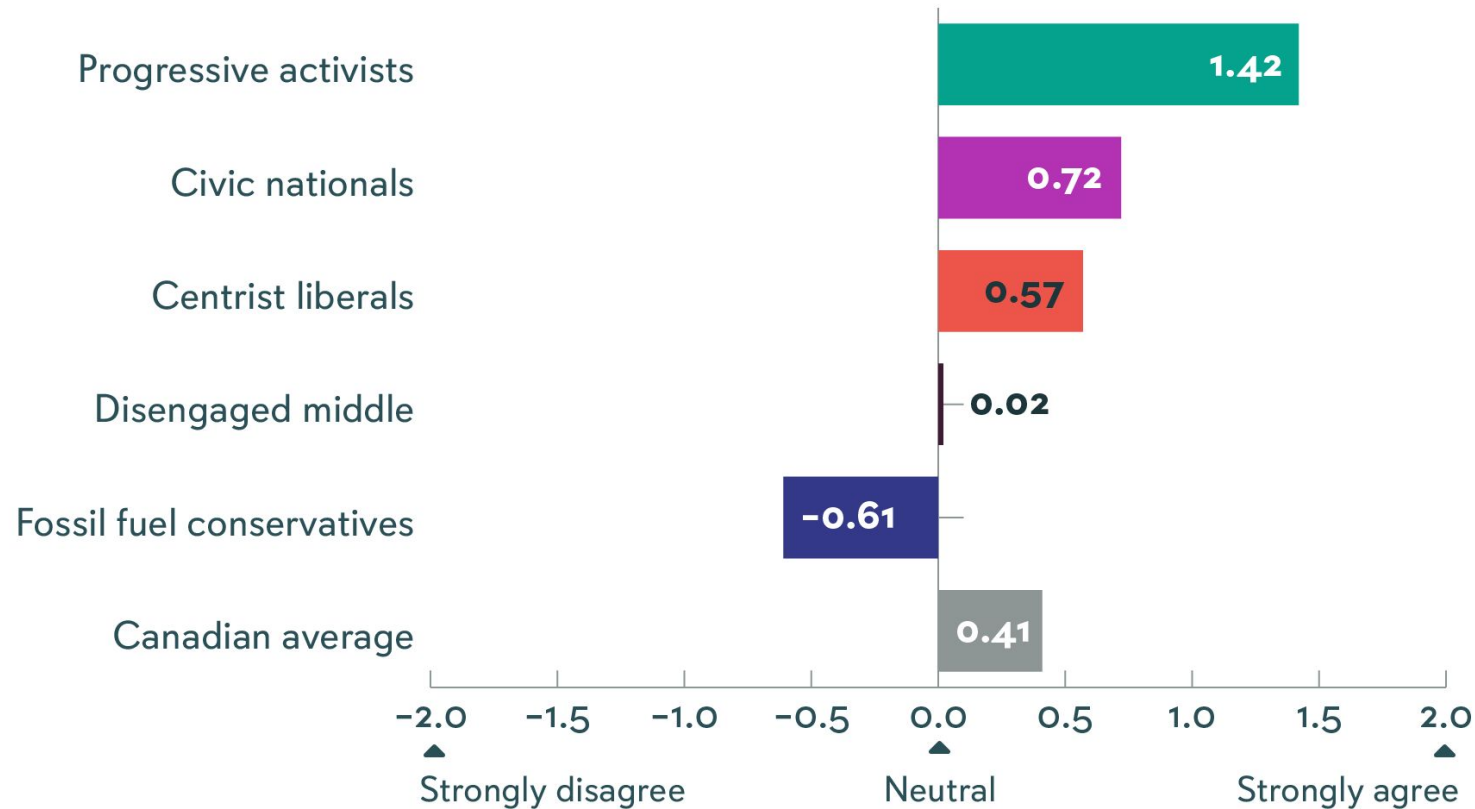
Agree/Disagree: There is too much foreign control over Canadian natural resources



Social licence to tax oil and gas

Three target segments show clear support taxing oil & gas

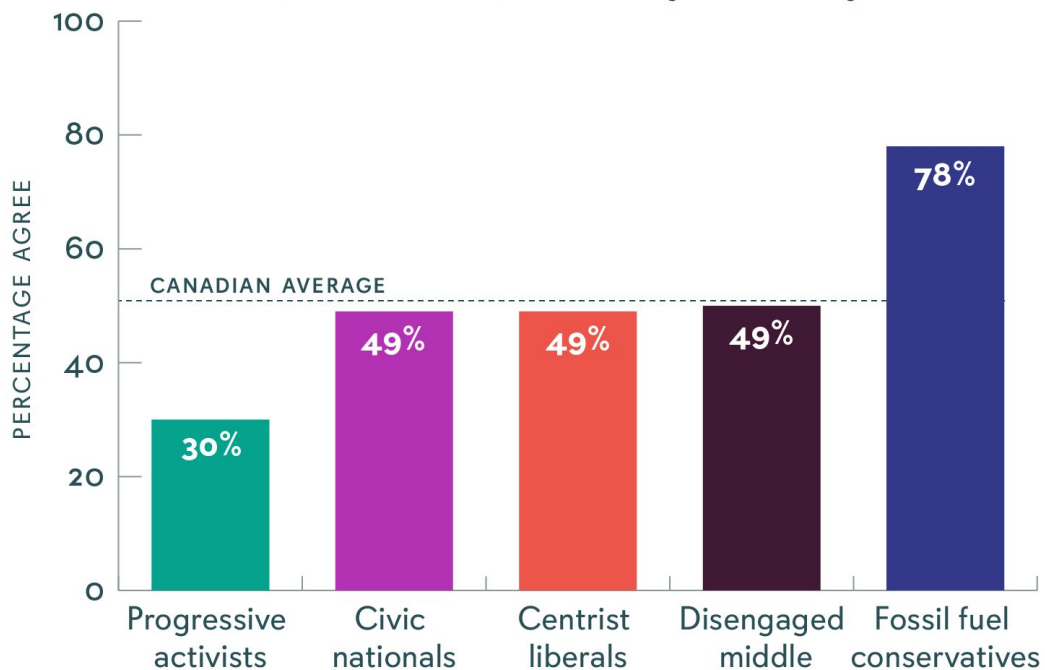
Support/oppose: “Increase taxes on oil and gas companies”



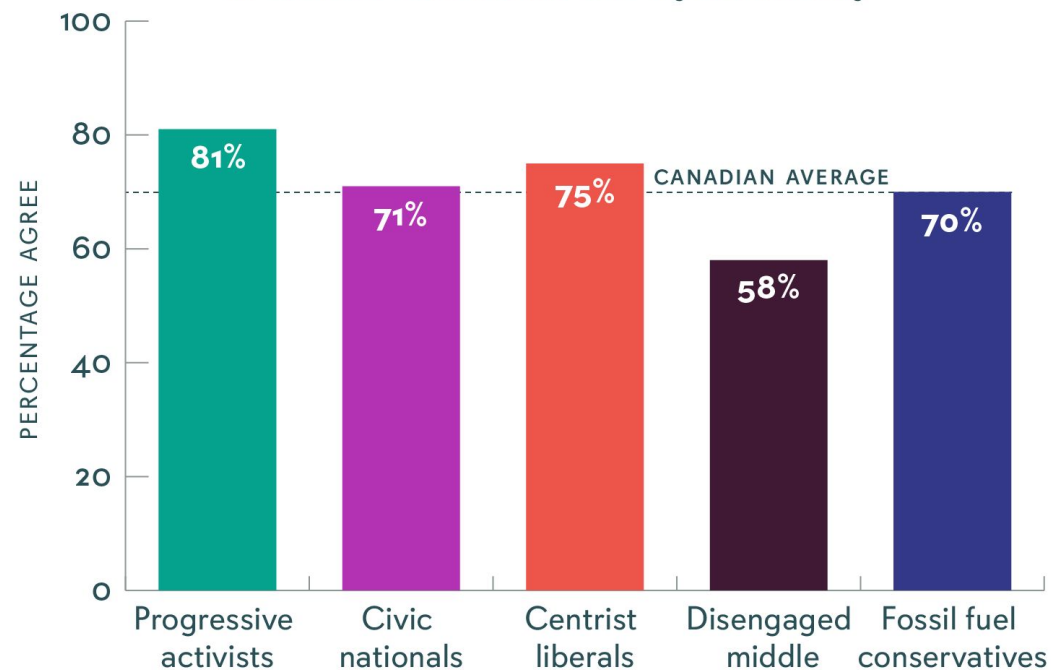
Perceived importance of economic sectors

More *believe* in the benefits of the technology sector, than in the benefits of the oil and gas sector

Agree/Disagree: A strong oil and gas sector in Canada benefits me and my community

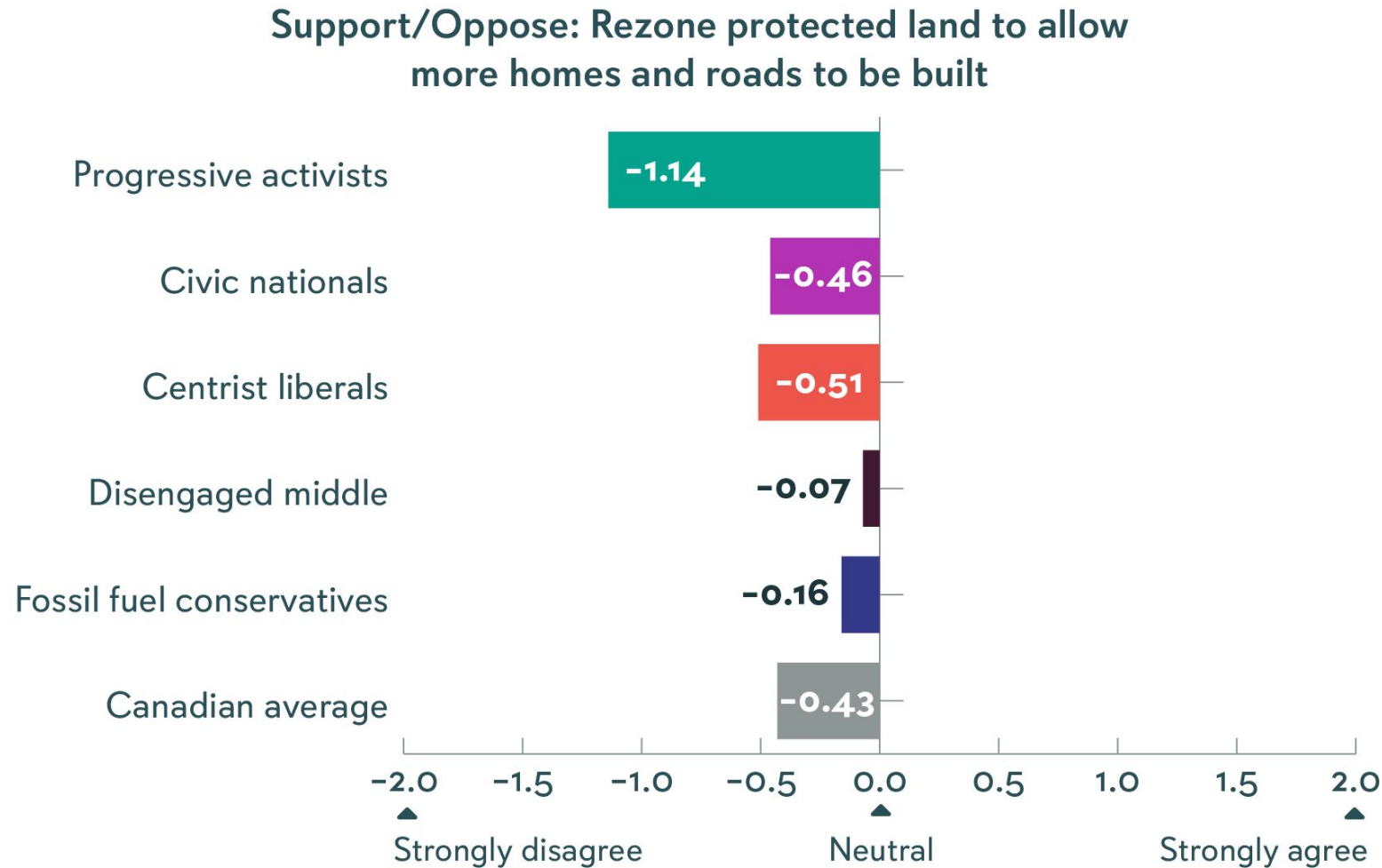


Agree/Disagree: A strong technology sector in Canada benefits me and my community



A conservation coalition?

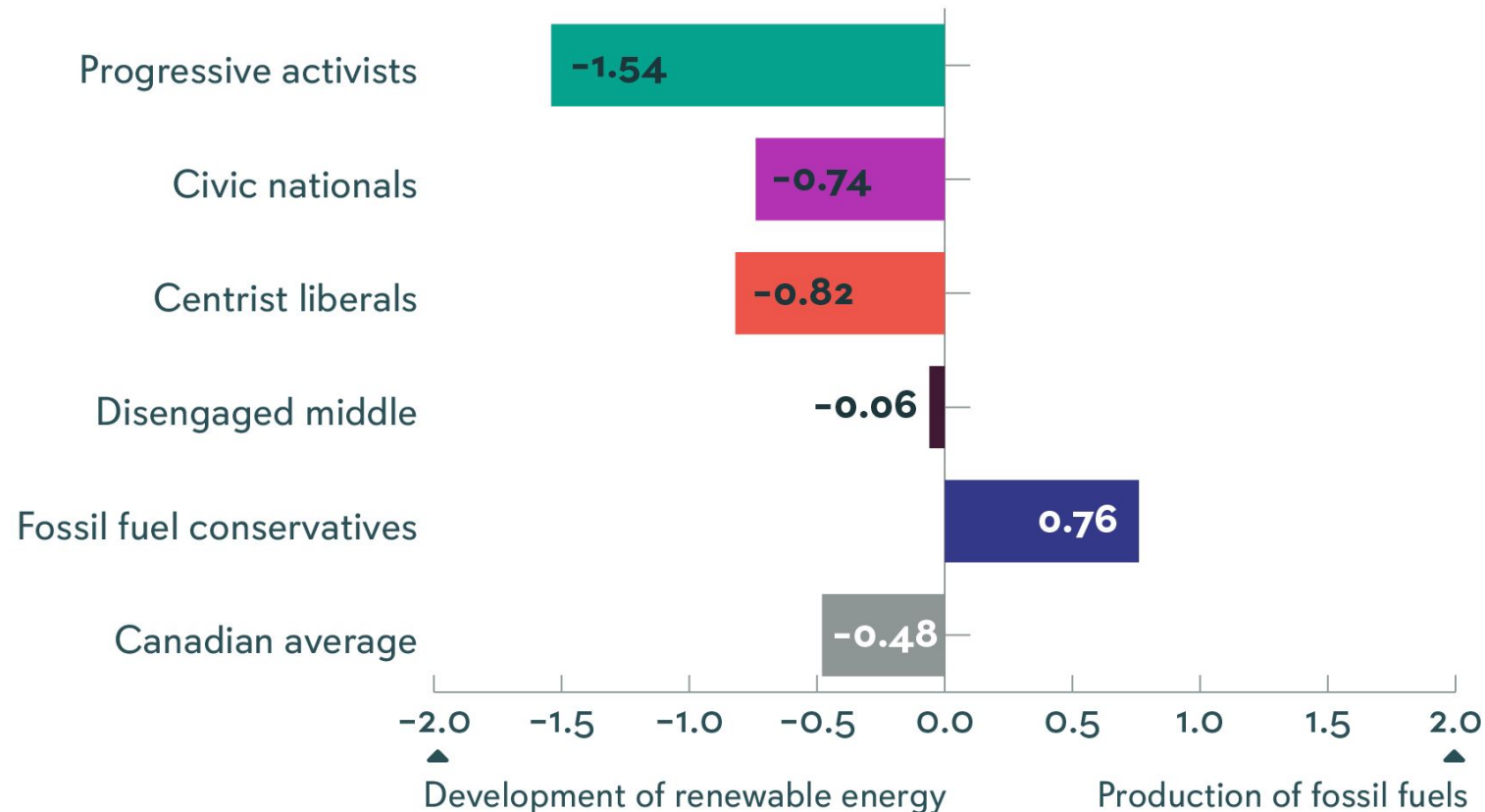
All segments oppose rezoning protected areas, but intensity varies



A clean energy coalition?

Net support for renewable energy across four of five segments

Thinking about how the country produces and uses energy, should Canada prioritize...



Takeaways: Common ground

Canadians, in all segments, are feeling the impacts of rising inflation and the high cost of living.

Talk about the value of a strong tech sector

- Various segments agree on value of a strong tech sector (challenging arguments in favour of strong oil and gas sector). Promote narratives around:
 - Clean technology includes renewable energy and electrification
 - Innovation in clean, renewable energy, (particularly with Centrist liberals who are keen on innovation as a source of economic growth)
 - Counter greenwashing about “clean fossil fuels” and carbon capture and sequestration with narratives about foreign corporations looking for taxpayers’ money (public subsidies) while raking in record profits on the backs of communities devastated by climate effects: wildfires, etc.

Go populist:

- Majorities in all segments, led by Progressive activists (80%) and Civic nationals (78%) believe “The system is rigged to serve the rich and powerful” while similar majorities led by Progressive activists (89%) and Civic nationals (84%) agree that “Corporate interests and wealthy insiders take more than their fair share of Canadian resource wealth.”
- These populist frames, and others emphasizing “too much foreign control over Canadian natural resources” are ripe for mobilizing action against powerful fossil fuel interests.
- Use appropriate messengers to raise awareness about the high levels of foreign ownership in Canada’s oil and gas sector and frame climate policy as action to correct this. If combined with “green nationalism” frames, this could elicit support among Civic nationals, Fossil fuel conservatives, and others, giving social license to better regulations (emissions cap) and taxes (upstream pricing) on foreign and other corporations in the O&G sector.

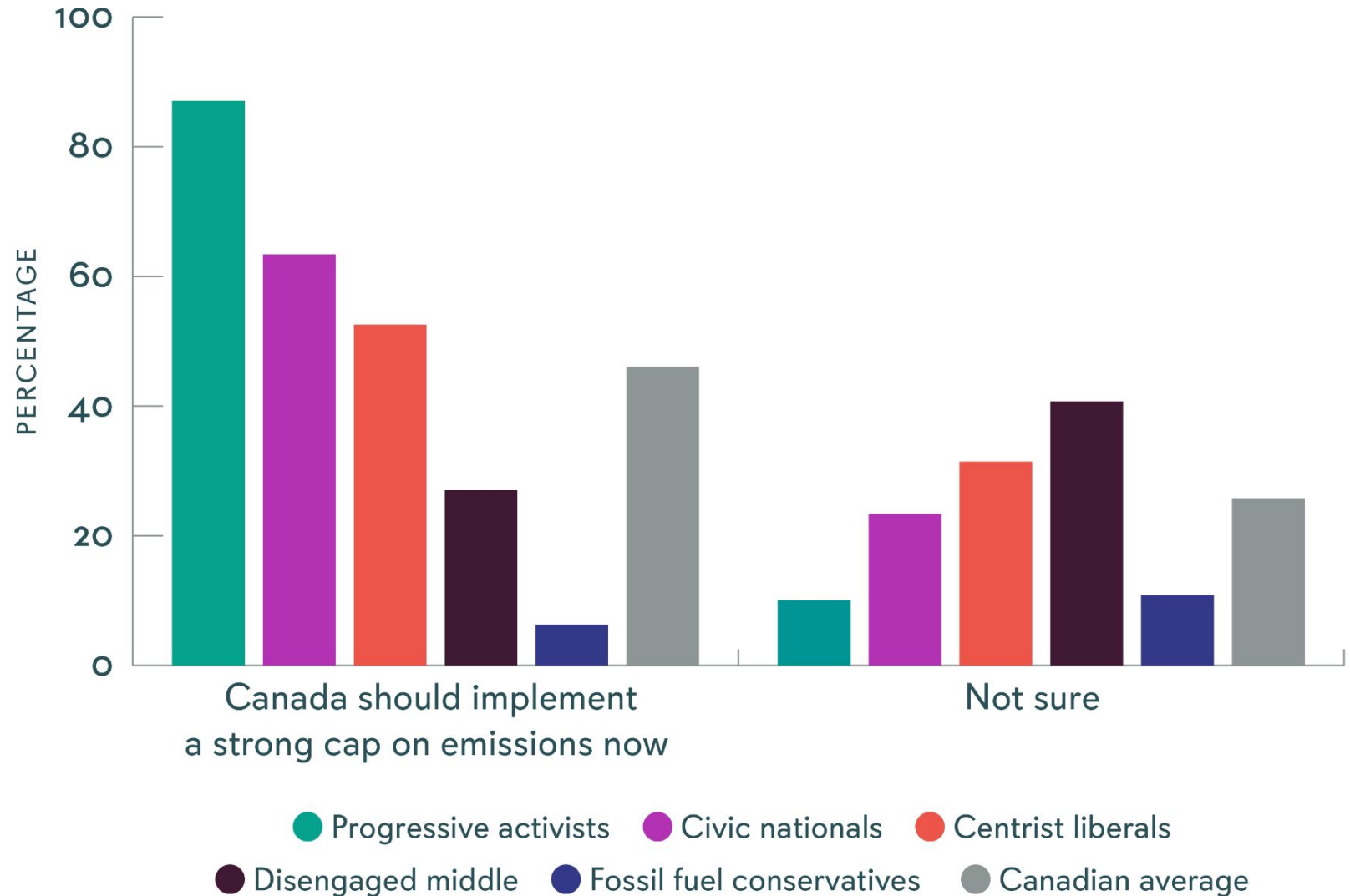
Build a coalition of voters for conservation and clean energy coalition

- Include Progressive Activists, Civic Nationals and Centrist liberals, but keep in mind: 1) Differing views of Civic nationals and Centrist liberals about rezoning of protected lands; and 2) Civic nationals and Centrist liberals are more likely to unite in support of conservation that protects local air and water quality.

Political preferences

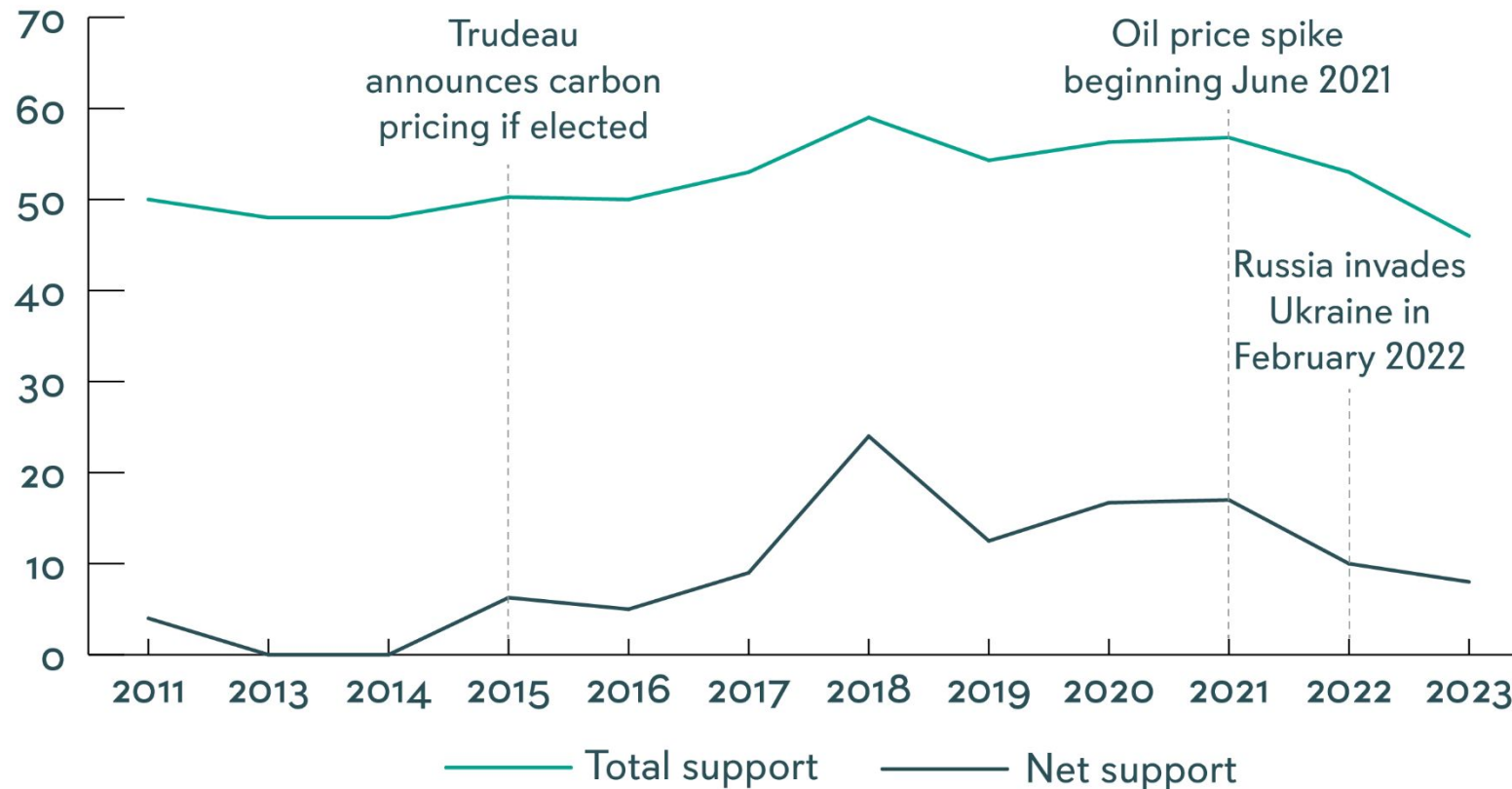
Uncertainty on emissions cap

Some people say that the Canadian government needs to set a strong cap on emissions from the oil and gas sector to help meet its commitments on climate change. Others say that a strong cap on emissions is unnecessary and that Canadian oil and gas companies are already taking steps to reduce emissions from production on their own. Which of the following best fits your view?



Declining support for a carbon tax

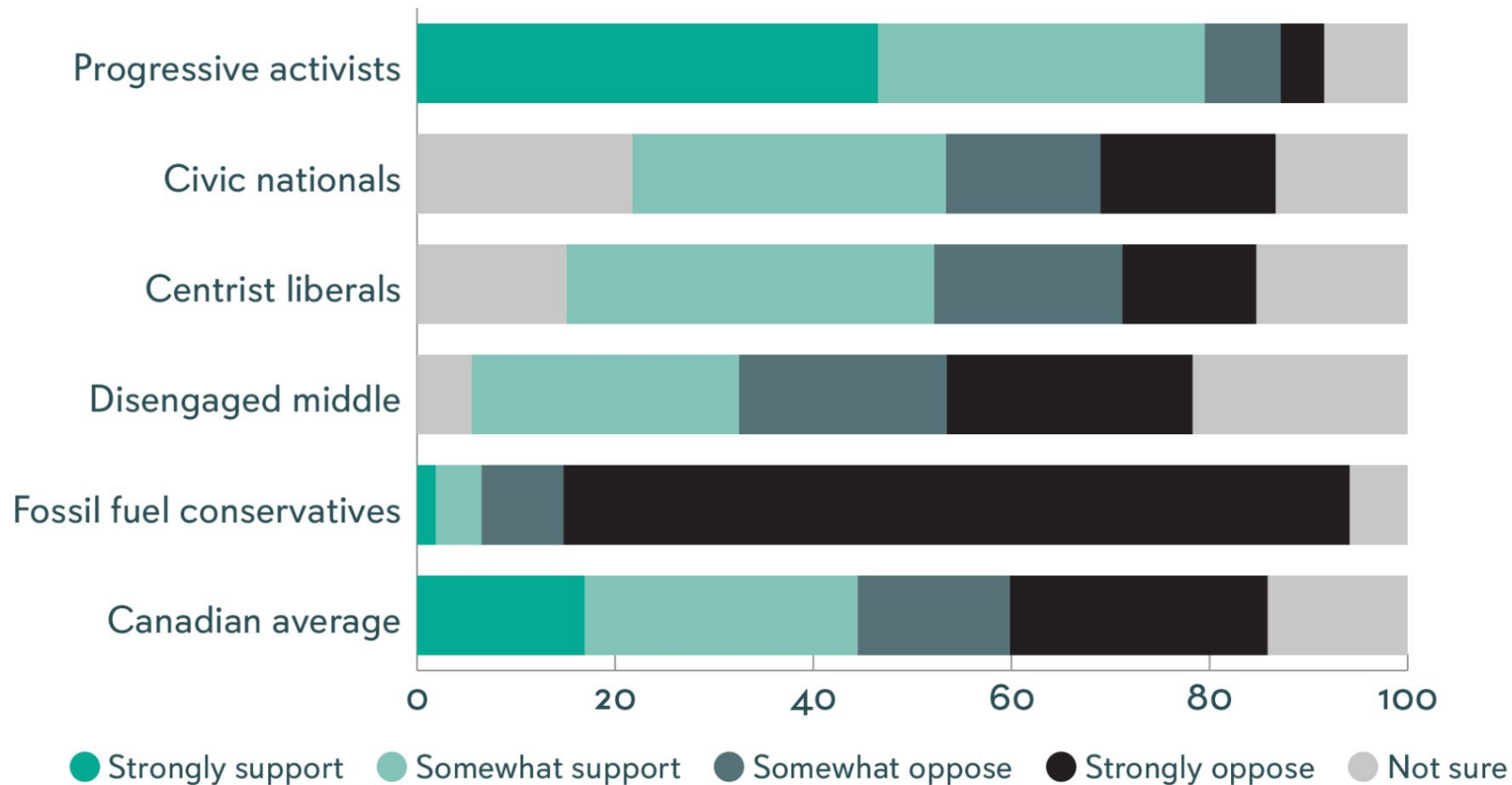
One way of reducing greenhouse gases and addressing climate change is to put a carbon tax on fuels such as coal, oil, and natural gas. Do you support/oppose this type of policy?



Carbon tax support by segment

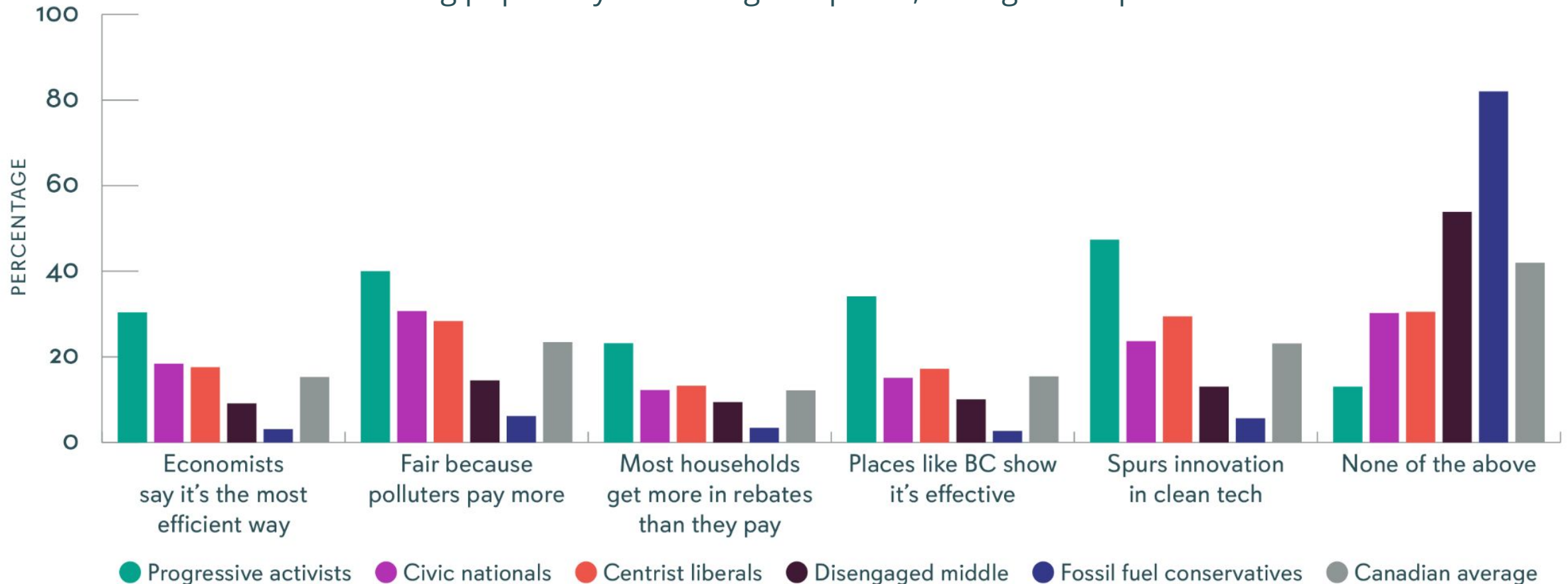
Disengaged middle may be open to arguments in defence of federal carbon tax

One way of reducing greenhouse gases and addressing climate change is to put a carbon tax on fuels such as coal, oil, and natural gas. Do you support/oppose this type of policy?



No clear argument for carbon tax

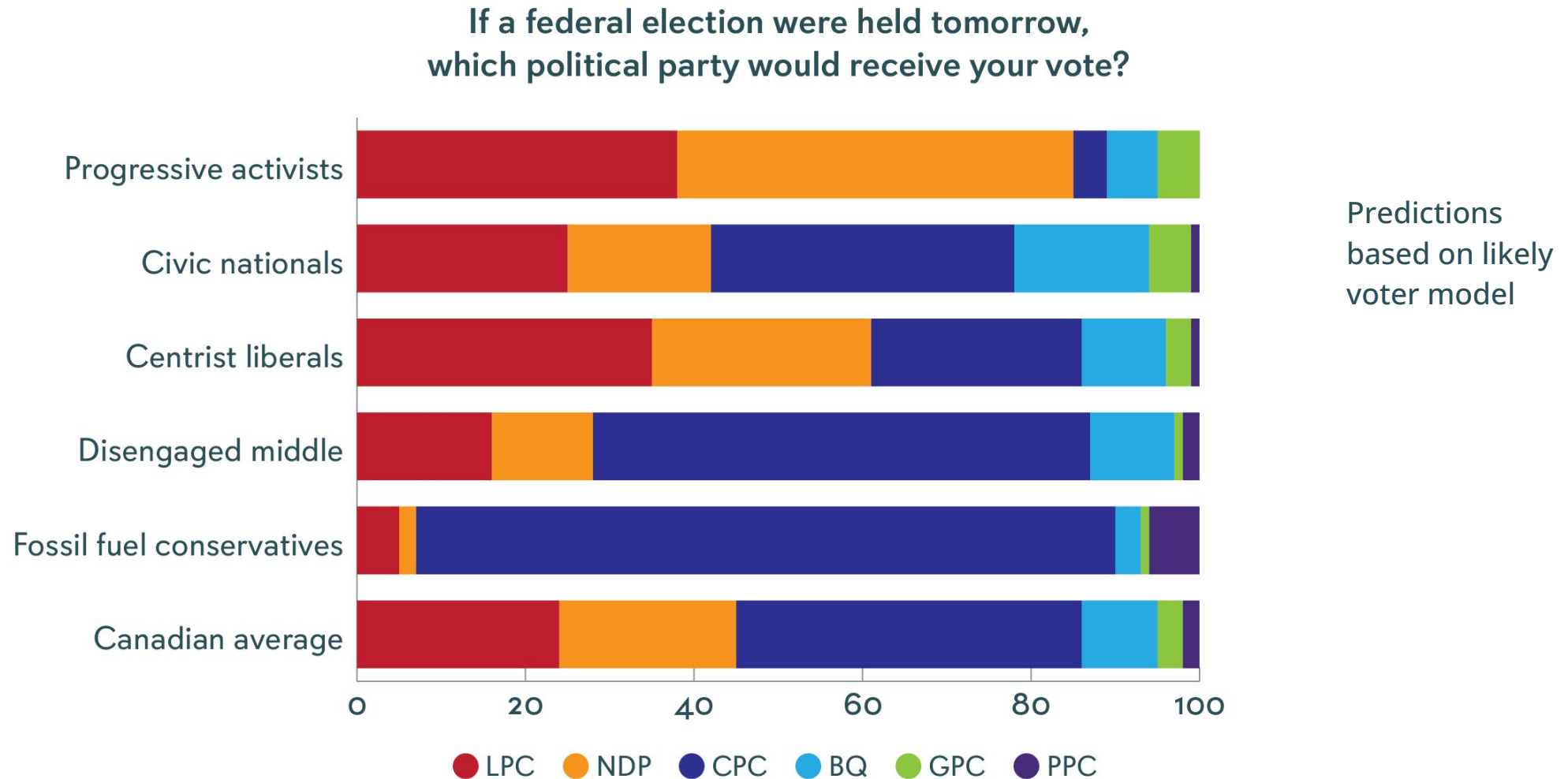
Carbon tax is losing popularity with rising fuel prices, no argument provides silver bullet



As you may have heard, the federal government has implemented a carbon price and rebate system in MB, PEI, Yukon, Nunavut, AB, SK, ON, NB, NS and NL. Other provinces have their own systems. From the following list, please identify which, if any, are the most convincing reasons to support carbon pricing in Canada.

Voting intention by segment

Most of pro-environmental vote could be split among three to five parties



Support by segment for policies

Use adjacent policy areas to target like-minded segments

Mean levels of support shown (-2 to +2 scale)
 High = scores over 1
 Medium = scores between 0.5 to 0.99
 Low = scores between 0 and 0.4
 "Negative" indicates net opposition

Policy	Canada Average	Progressive Activists	Civic Nationals	Centrist liberals	Disengaged middle	Fossil fuel conservatives
Increase conservation programs to protect local air and water quality	High	High	High	High	Low	Low
Remove GST from home heating	High	Medium	High	Medium	High	High
Convert government buildings to residential properties	Medium	High	High	Medium	Medium	Medium
Re-zone protected land to allow more homes and roads to be built	Negative (low)	Negative (high)	Negative (medium)	Negative (medium)	Negative (low)	Negative (low)
Increase taxes on oil and gas companies	Medium	High	Medium	Medium	Low	Negative (medium)
Implement a new publicly funded drug plan	Medium	High	Medium	Medium	Low	Low
Require parental consent before children can change their gender identification at school	Medium	Negative (medium)	Medium	Low	Medium	High
Increase government support for reconciliation with Canada's Indigenous Peoples	Low	High	Low	Medium	Negative (low)	Negative (medium)
Increase foreign aid for developing countries	Negative (low)	Medium	Negative (low)	Low	Negative (low)	Negative (high)

Takeaways: political considerations

One-in-three voters remains undecided

- Progressive activists are most likely to vote strategically, followed by Civic nationals and Centrist liberals
- Civic nationals (who lack a clear political home) and Centrist liberals could vote different, splitting the progressive vote

Potential coalitions across policy issues

- The three most reachable segments strongly support public safety (strengthening gun laws); taxes on big tech (appeal to nationalist values here), and conservation programs to protect local air and water quality
- Limited support for international aid (and, likely, compensation for countries most impacted by global warming), so communicate about Canadian victims (and the unequal impacts) of climate change, and benefits of climate action, in Canadian communities.

Top five political issues for most receptive segments:

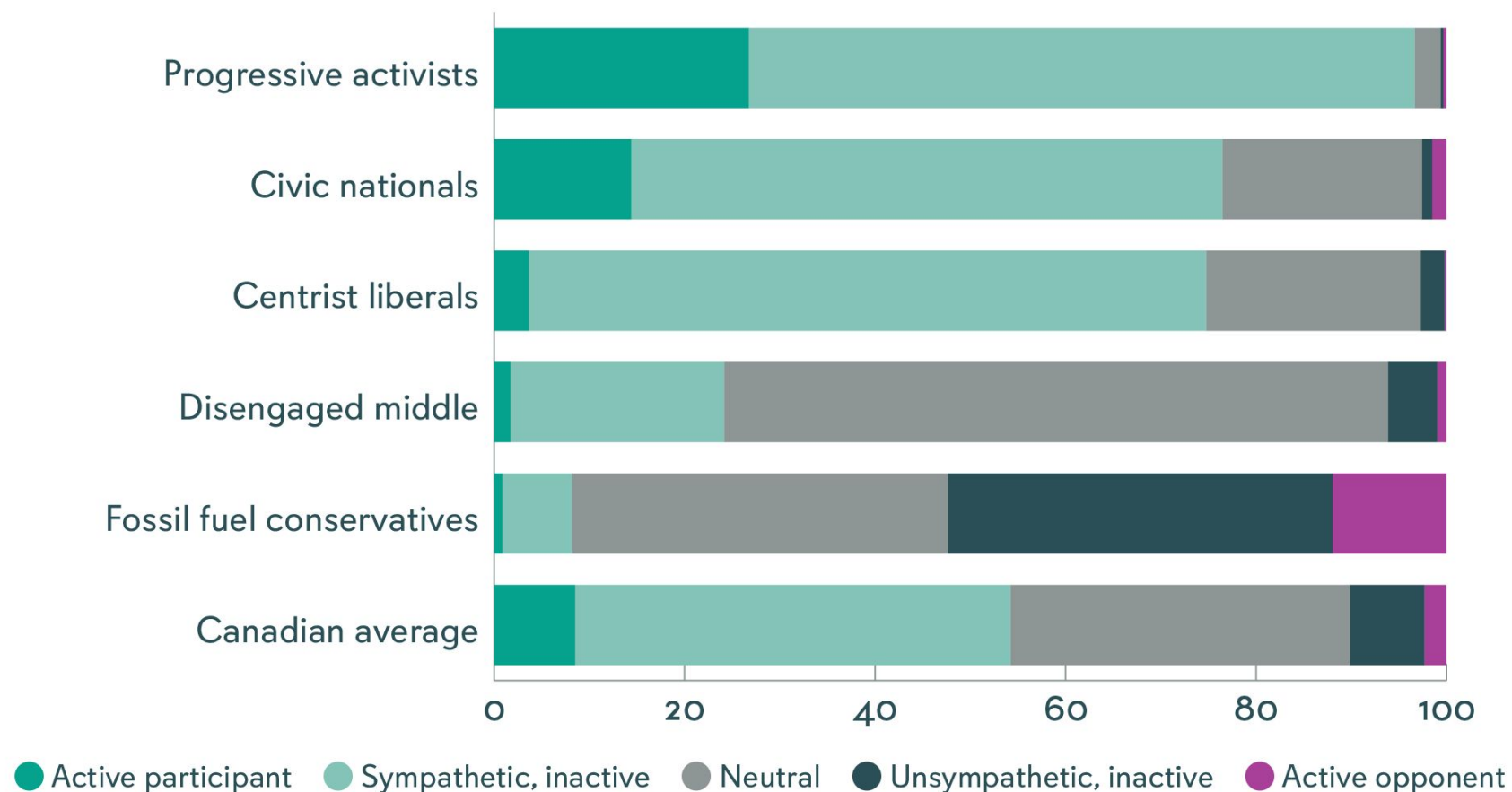
- Progressive Activists: local conservation, taxing O&G companies, stronger gun laws, taxing big tech, publicly funded drug plan
- Civic Nationals: local conservation, removing GST on home heating, stronger gun laws, taxing big tech, affordability/housing/immigration
- Centrist liberals: local conservation, strengthening gun laws, removing GST from home heating, taxing big tech, publicly funded drug plan, and affordability/housing

Reaching the target segments

Most reachable segments for NGOs

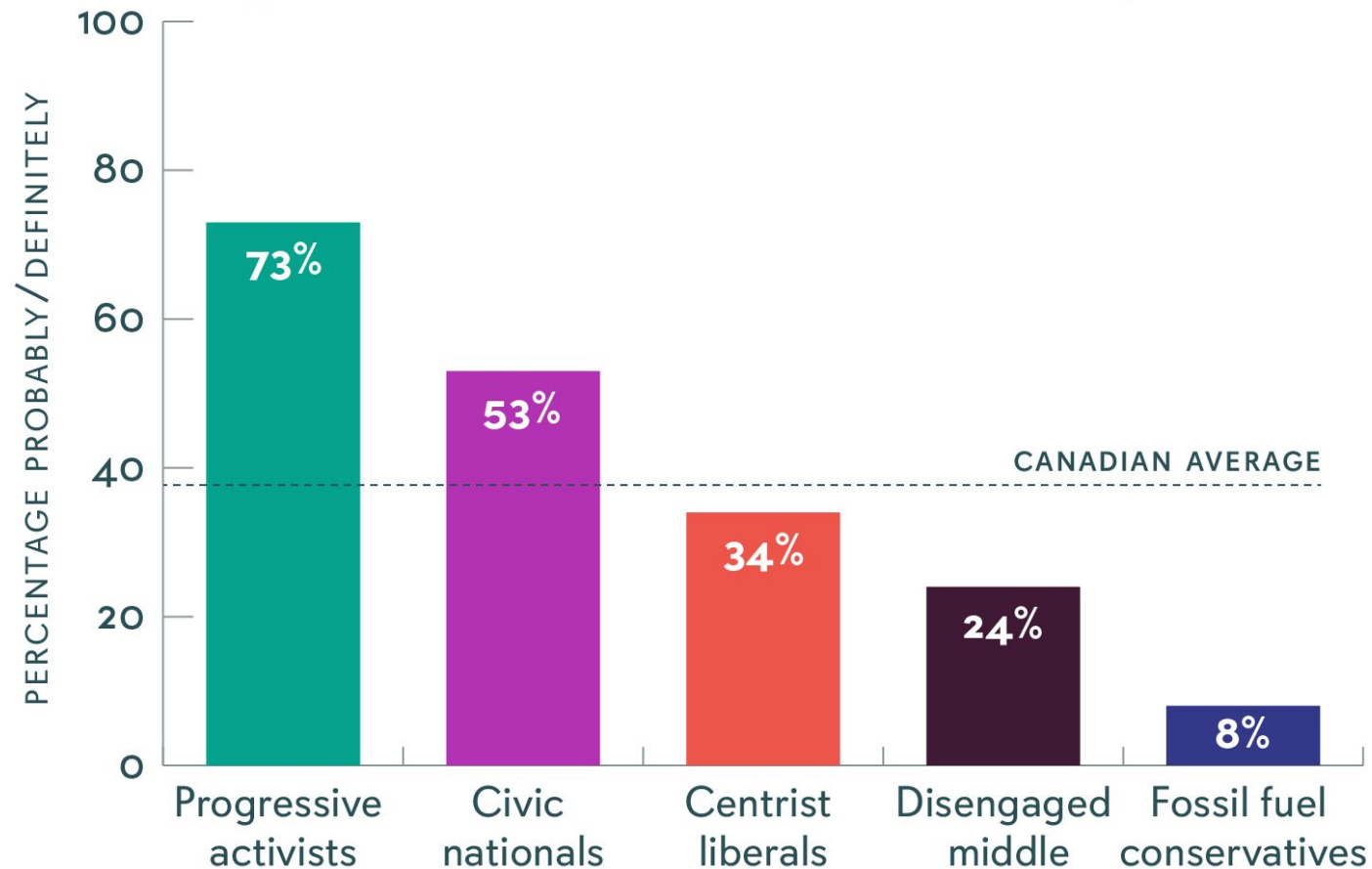
Significant sympathy for the environmental movement

Thinking specifically about the environmental movement, do you think of yourself as...?



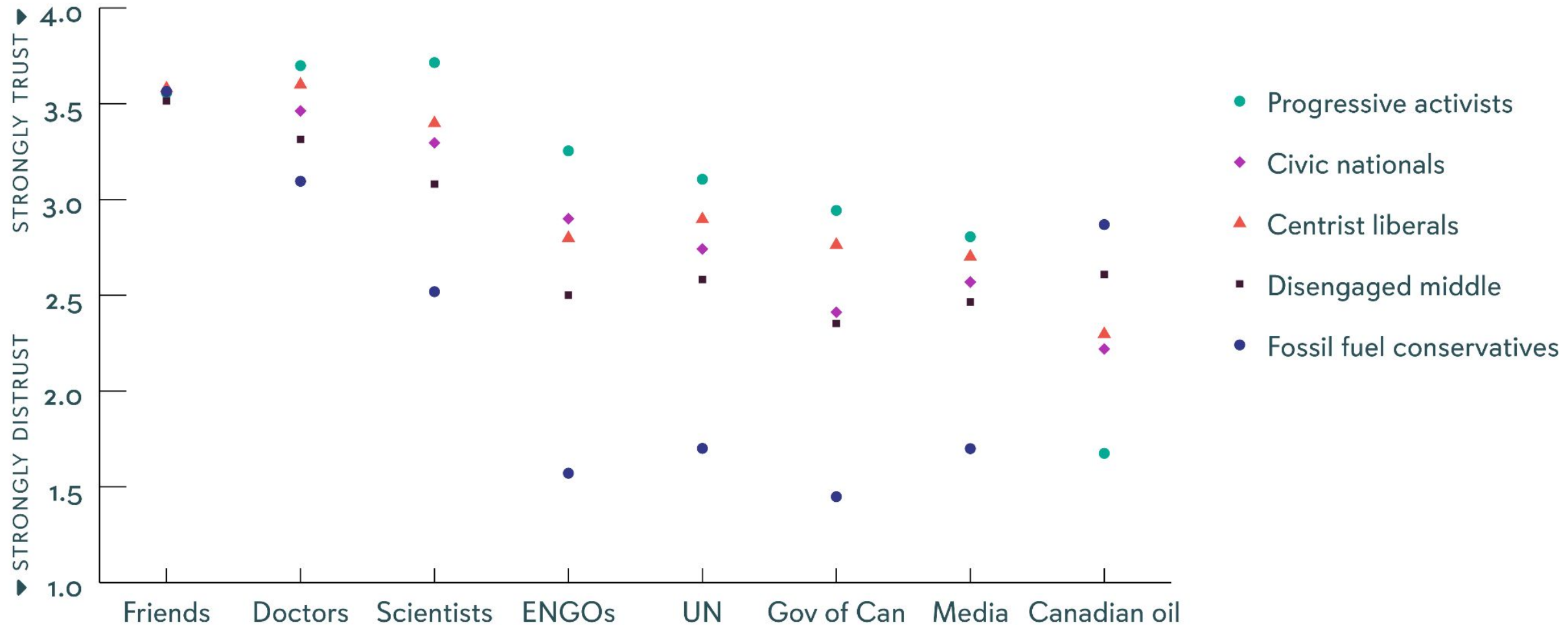
Engagement potential

Would you be willing to join a campaign urging your provincial government to do more about climate change?



Trusted messengers

Generally speaking, how much do you trust or distrust the following organizations and groups of people to do what is right?



Questions?



Extras

The following additional slides offer further details from the CA-MAP survey on the values and behaviour of the different national segments.

Five value personas: political/social

Ranked by overall positioning on more general political and social values



Progressive activists

17%



Centrist liberals

21%



Disengaged middle

28%



Civic nationals

19%

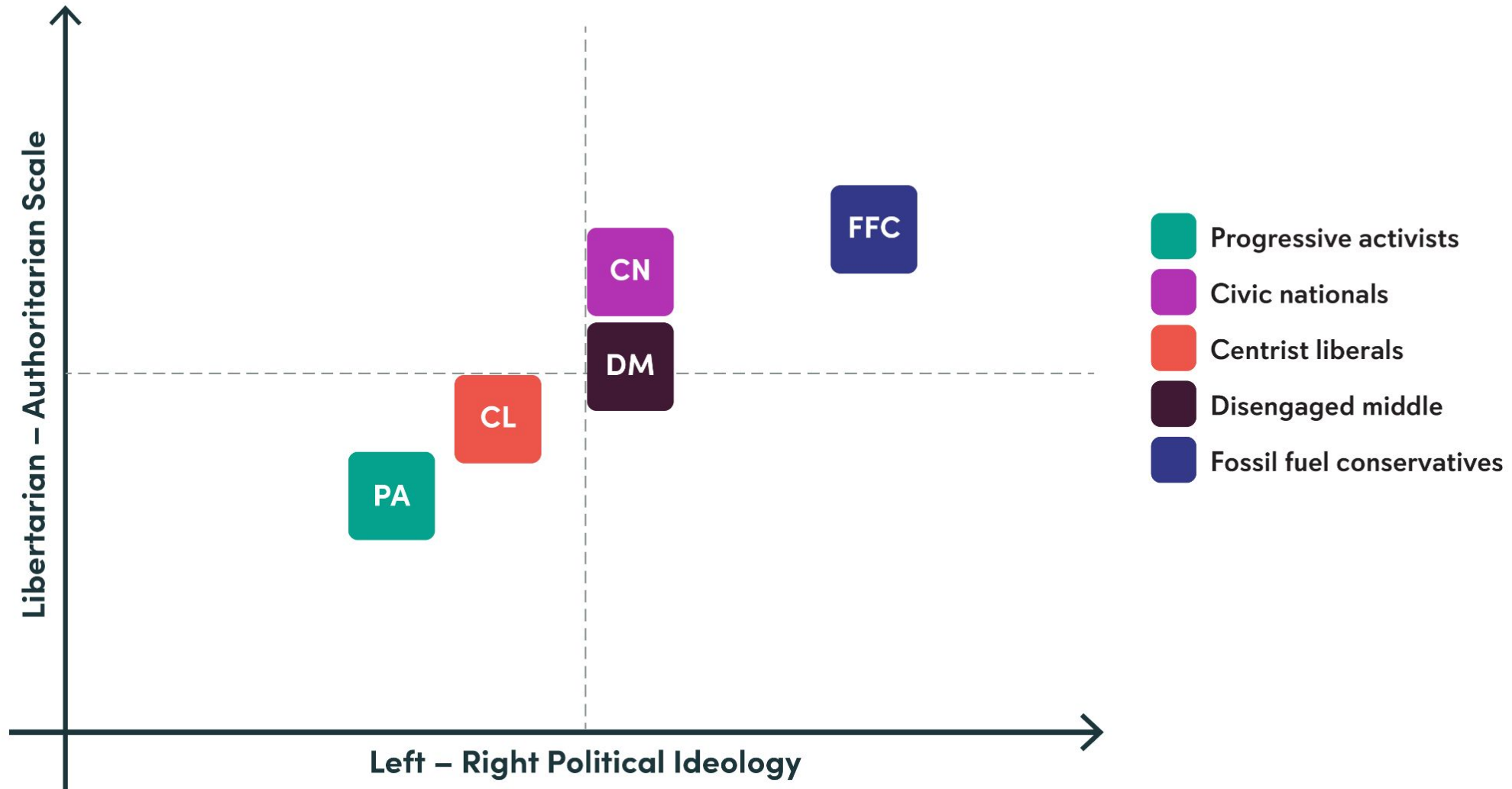


Fossil fuel conservatives

15%

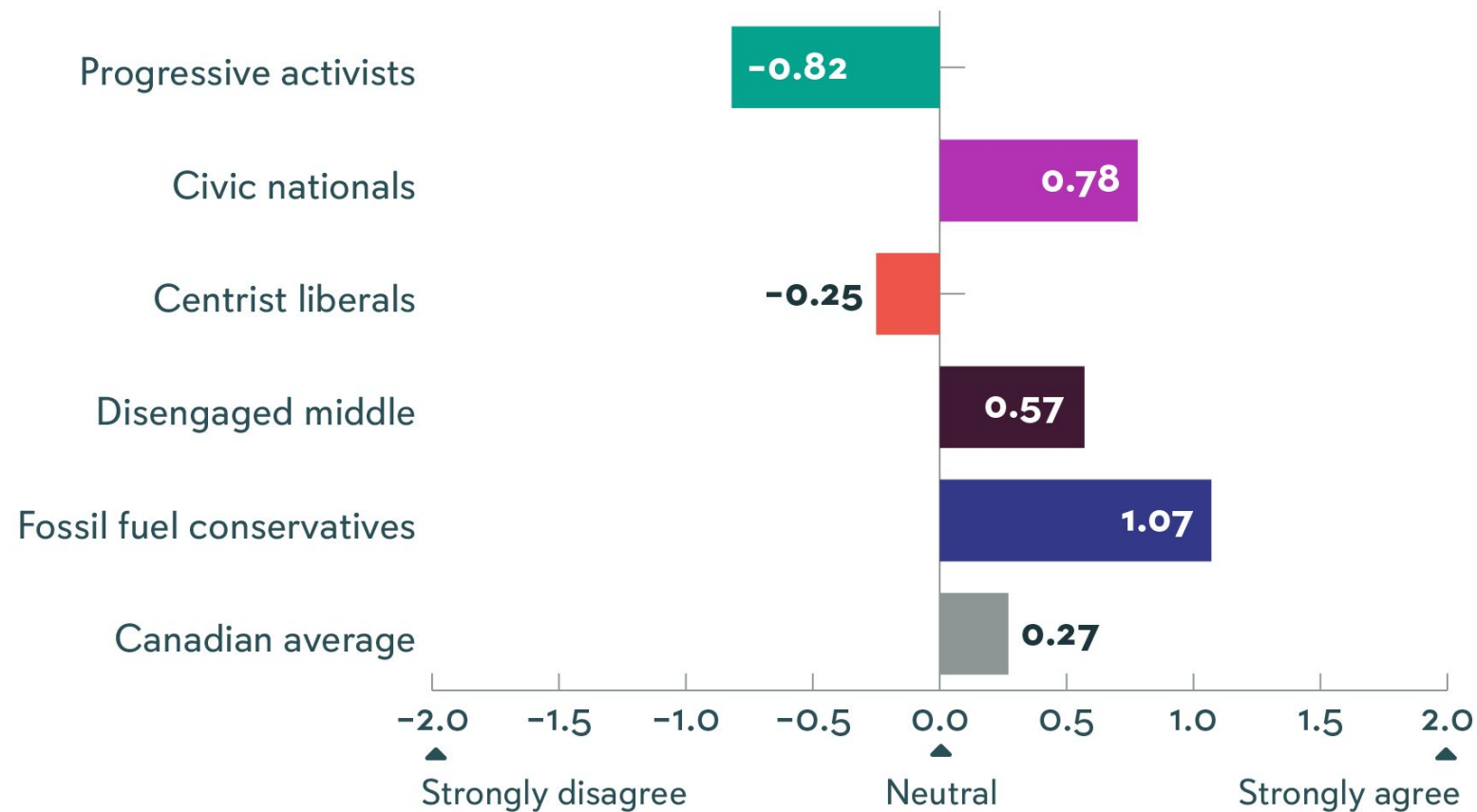
Percentages indicate
proportion of respondents
in each segment

Segments' political & social values



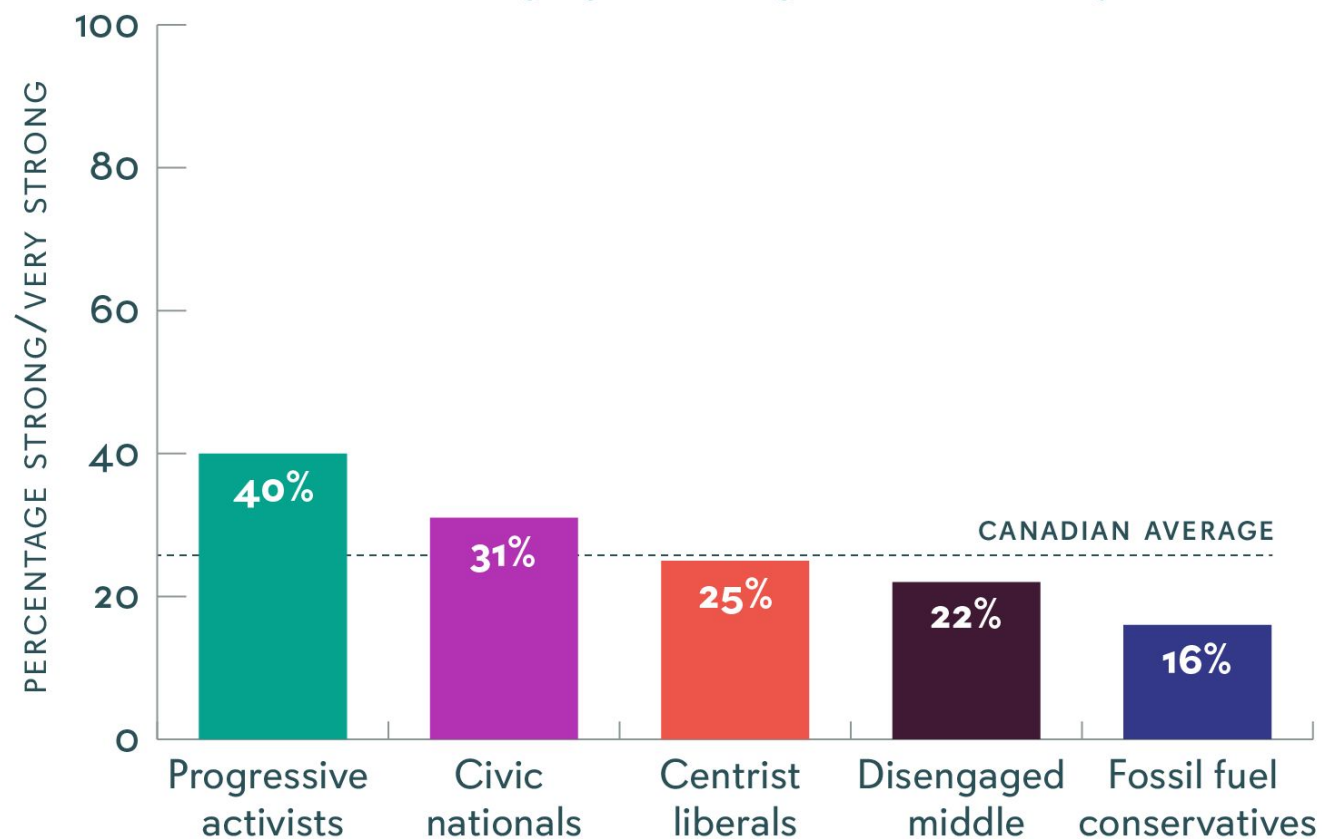
Nativism

Agree/Disagree: When jobs are scarce employers should
prioritize Canadian workers over immigrants



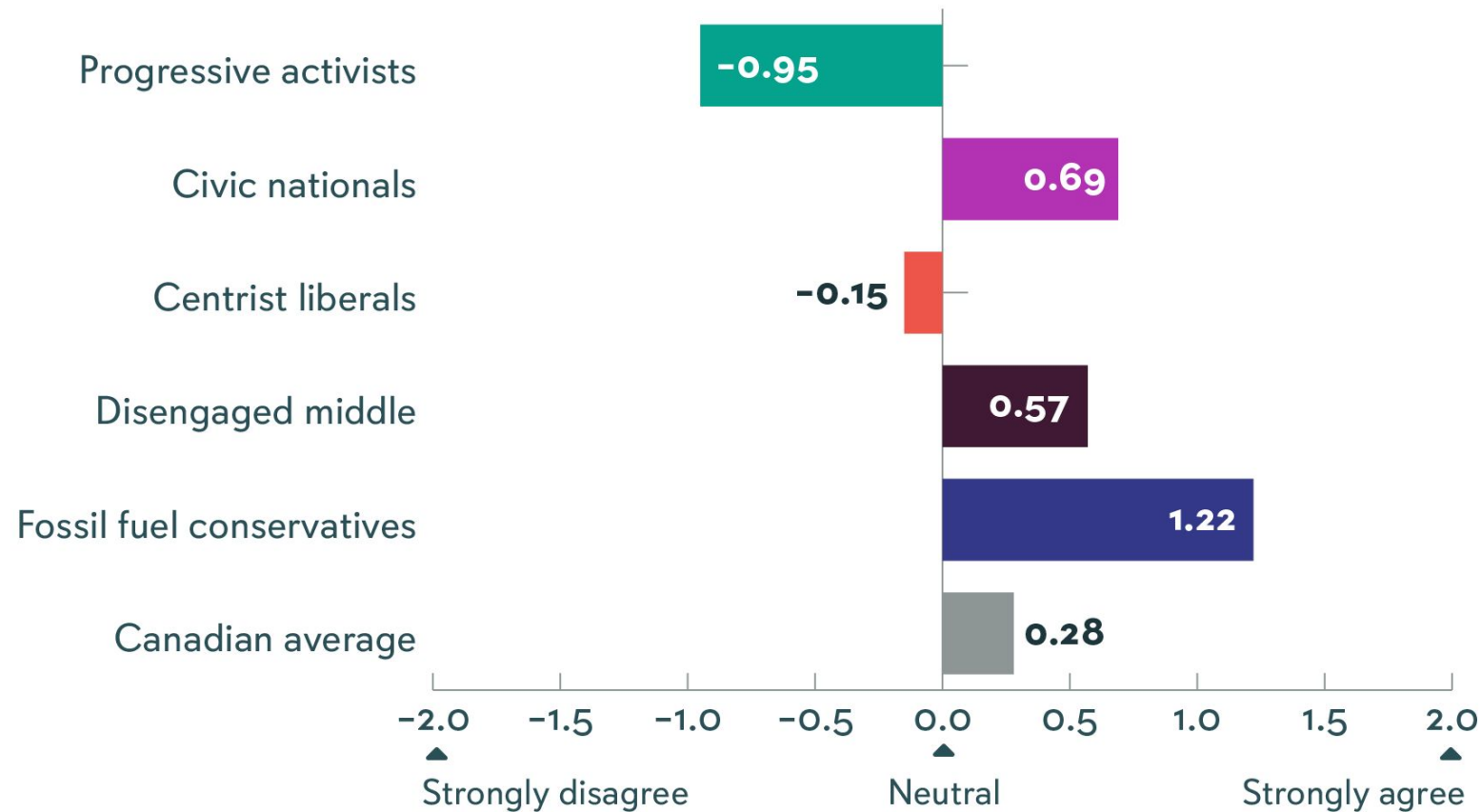
Cosmopolitanism

To what extent do you feel a weak or strong sense of belonging to... the global community?



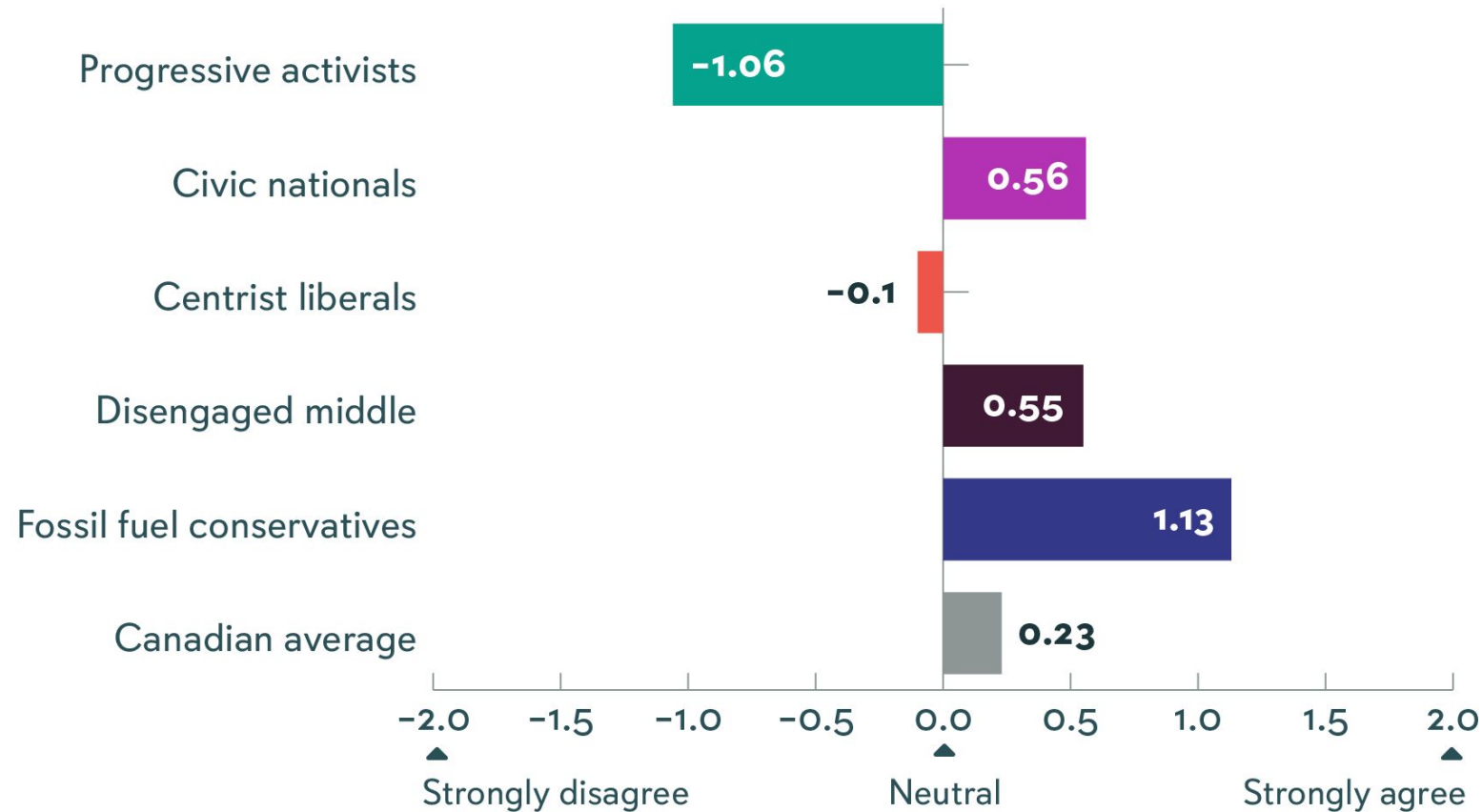
Traditionalism

Agree/Disagree: A lot of problems in our society come from the decline of the traditional family



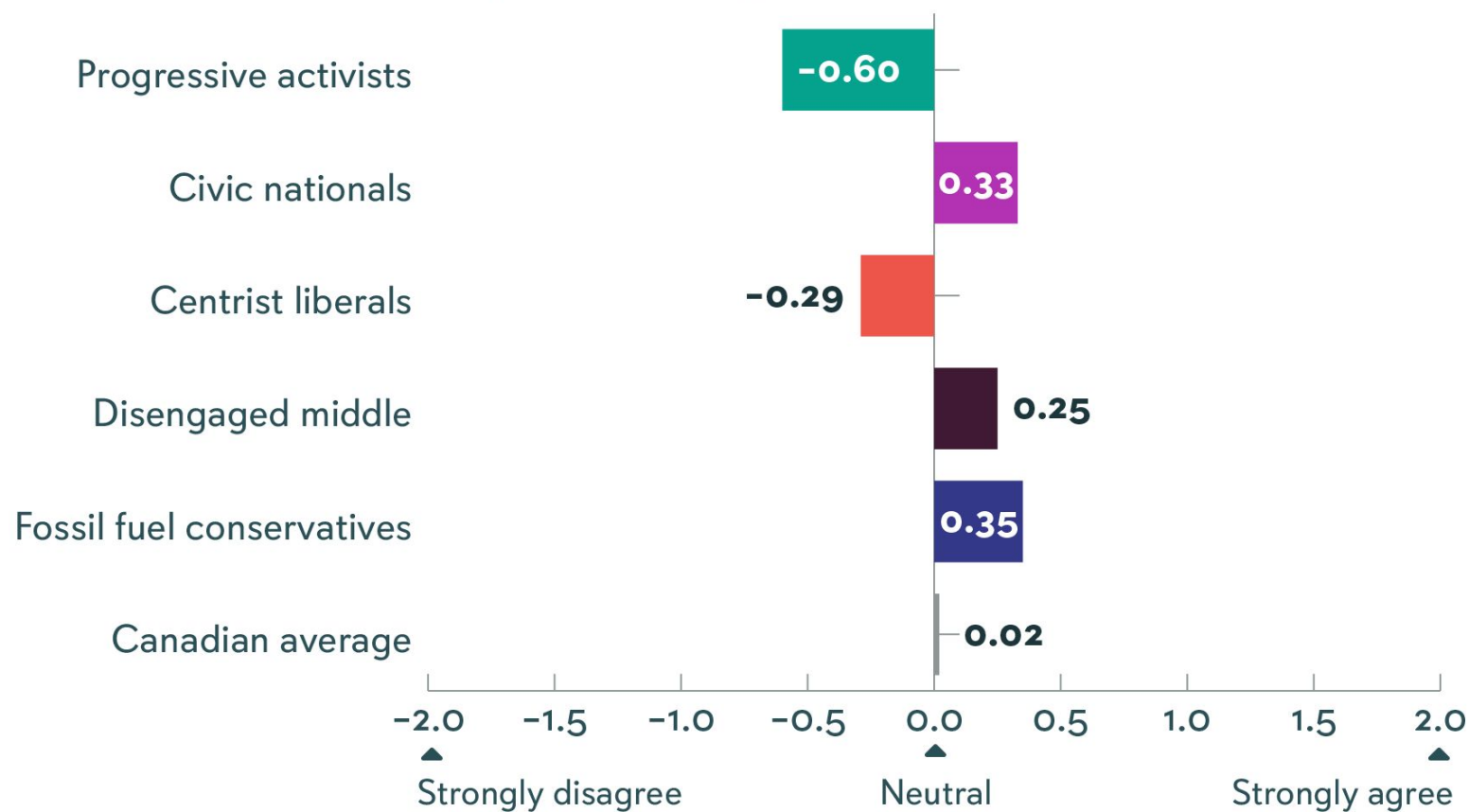
Hierarchism

Agree/Disagree: It seems like Aboriginal and Indigenous people don't want equal rights, they want special rights just for them



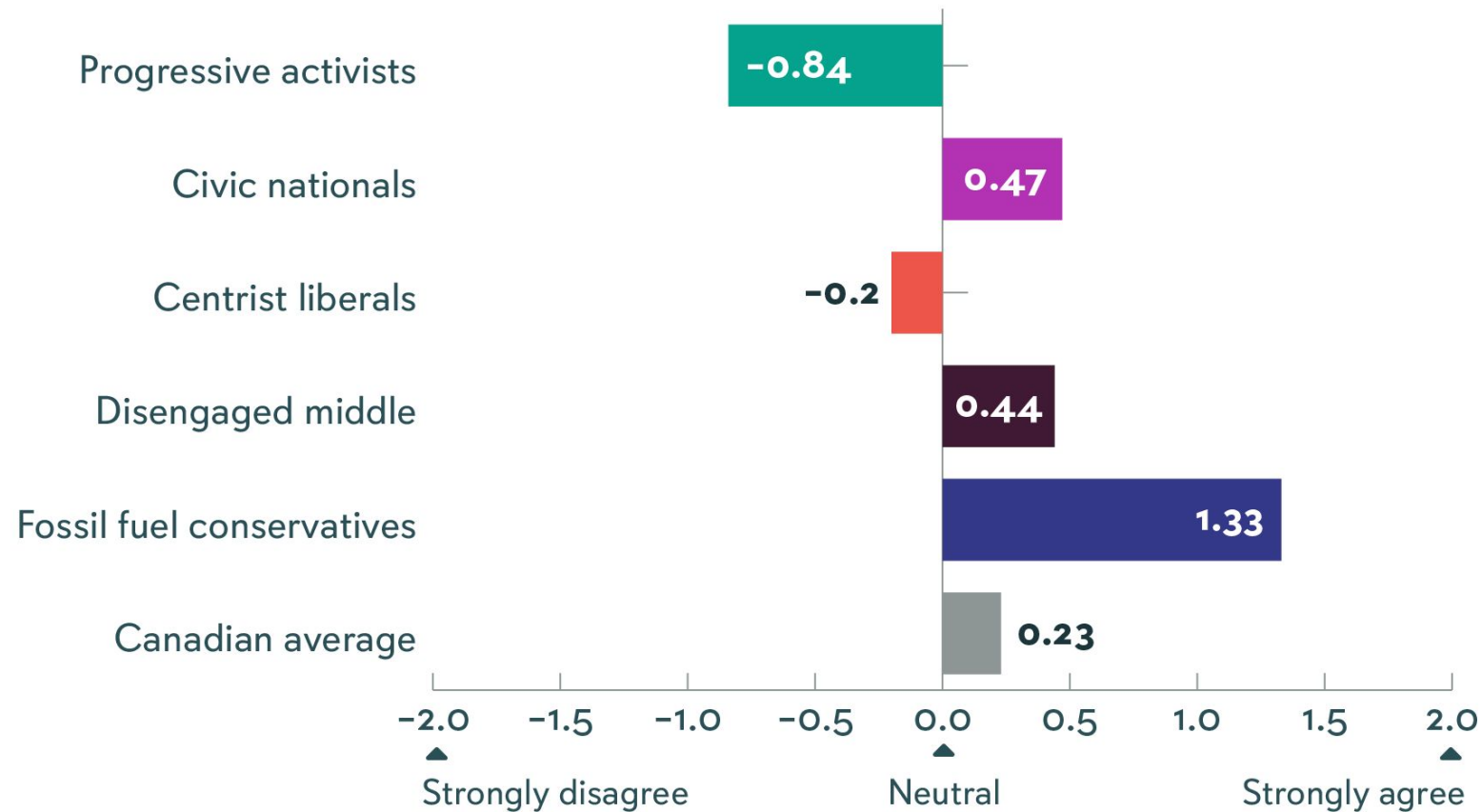
Authoritarianism

Agree/Disagree: To fix the country we need a strong leader willing to break the rules



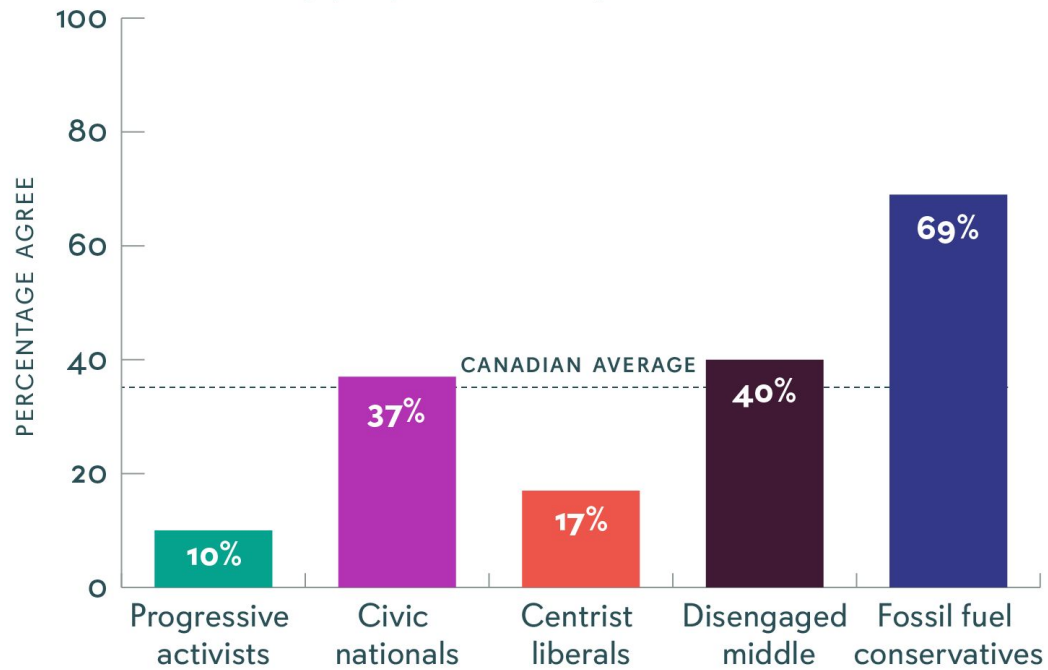
Libertarianism

Agree/Disagree: Government interferes far too much in our everyday life

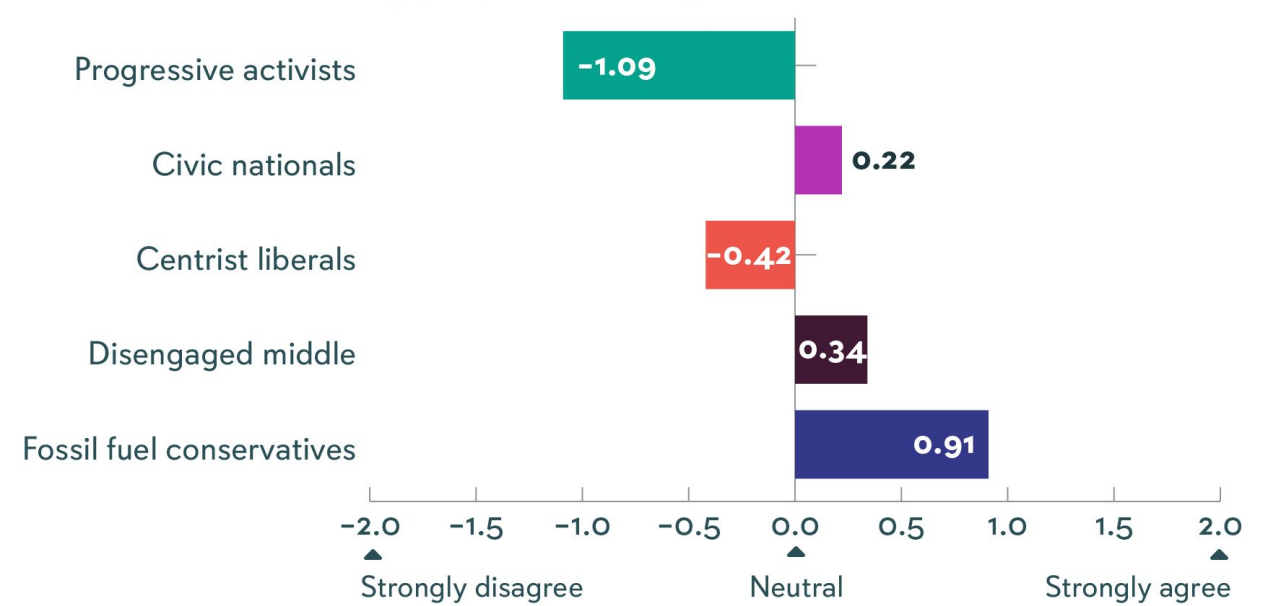


Populism

Agree/disagree: I'd rather put my trust in the common sense of ordinary people than in experts and intellectuals

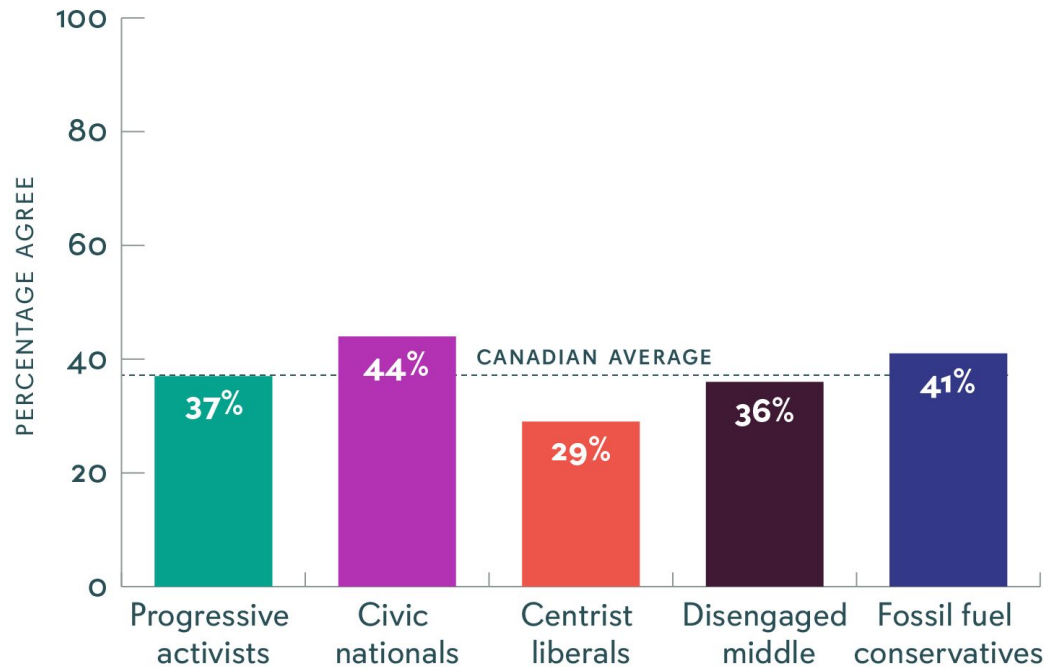


Agree/Disagree: I'd rather put my trust in the common sense of ordinary people than in experts and intellectuals

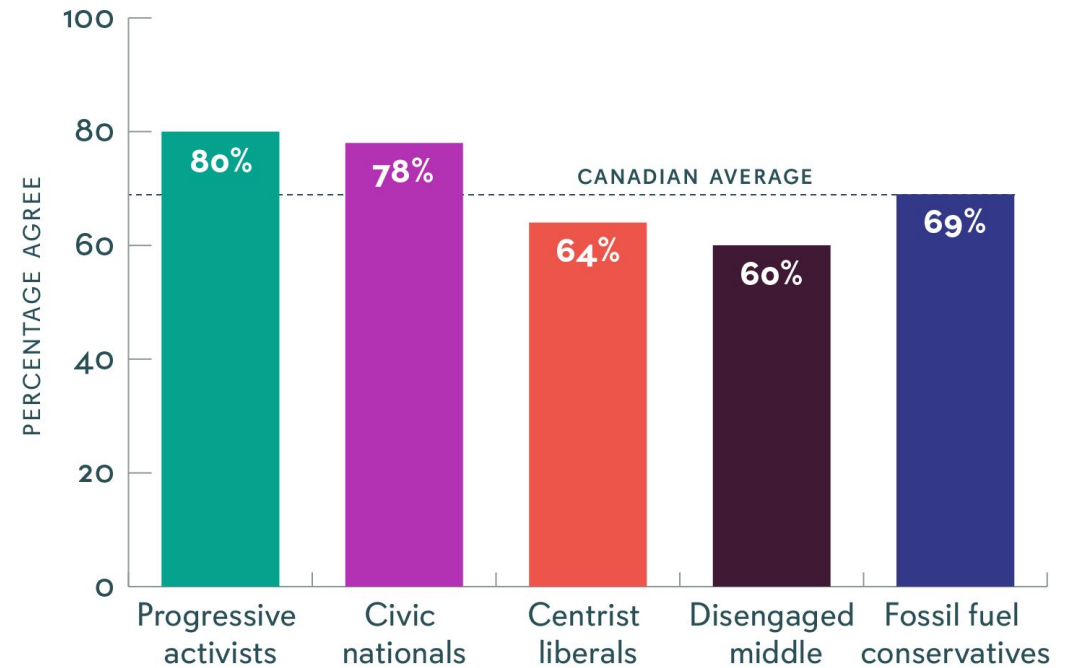


A majority in all segments believe the system is unfair

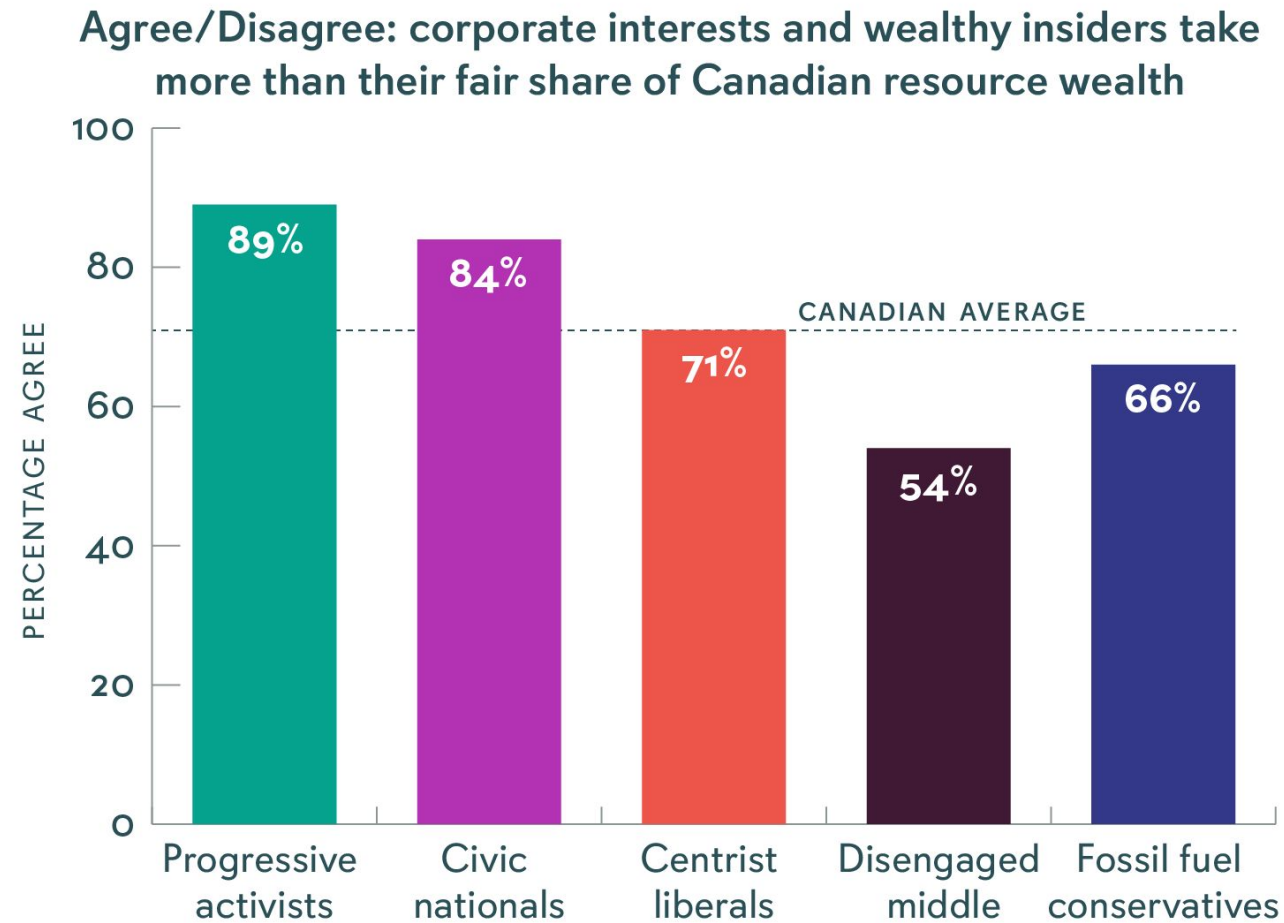
Agree/Disagree: It's difficult for me to meet my monthly expenses



Agree/Disagree: The system is rigged to serve the rich and powerful

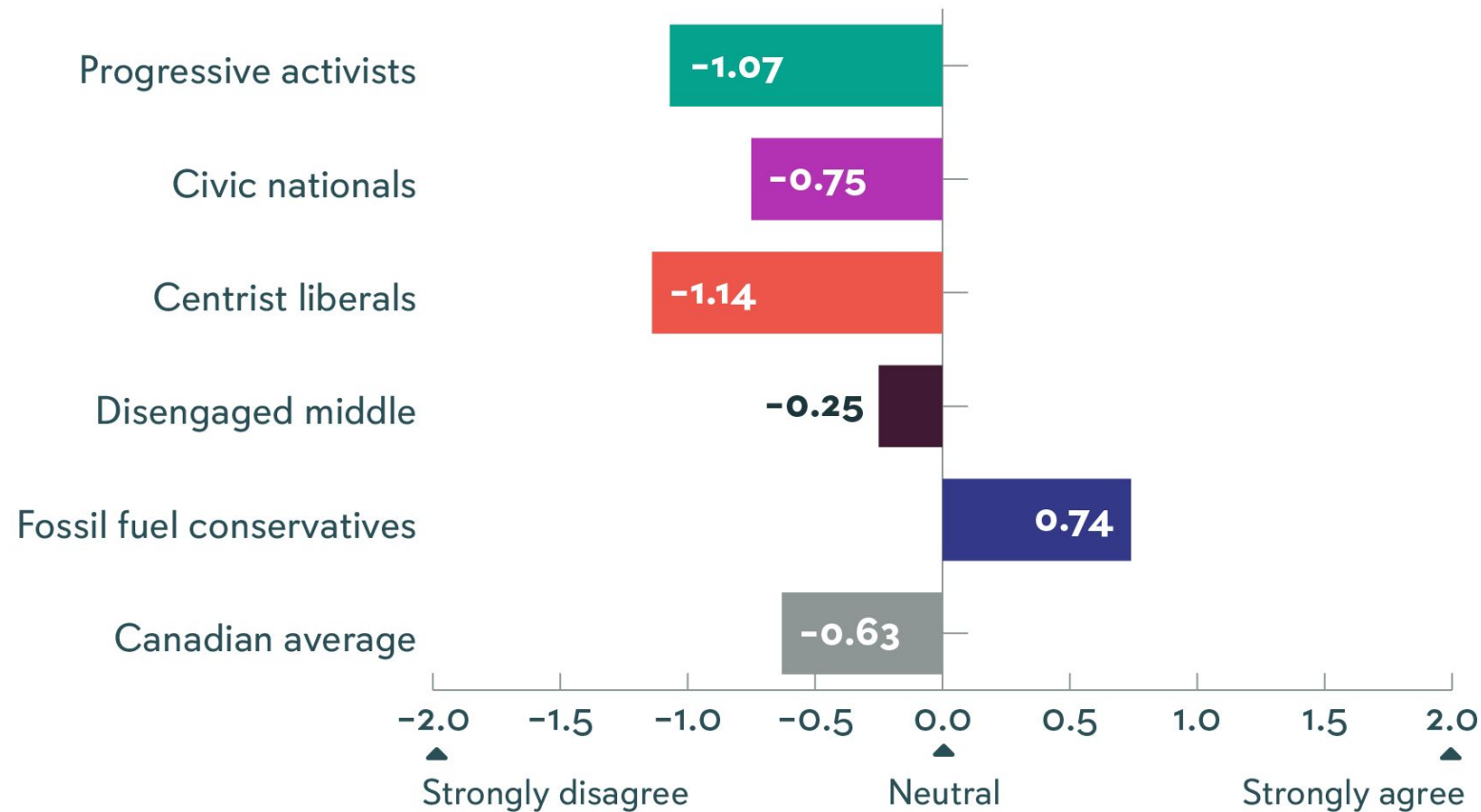


Perceived unfairness extends to the distribution of Canadian resource wealth



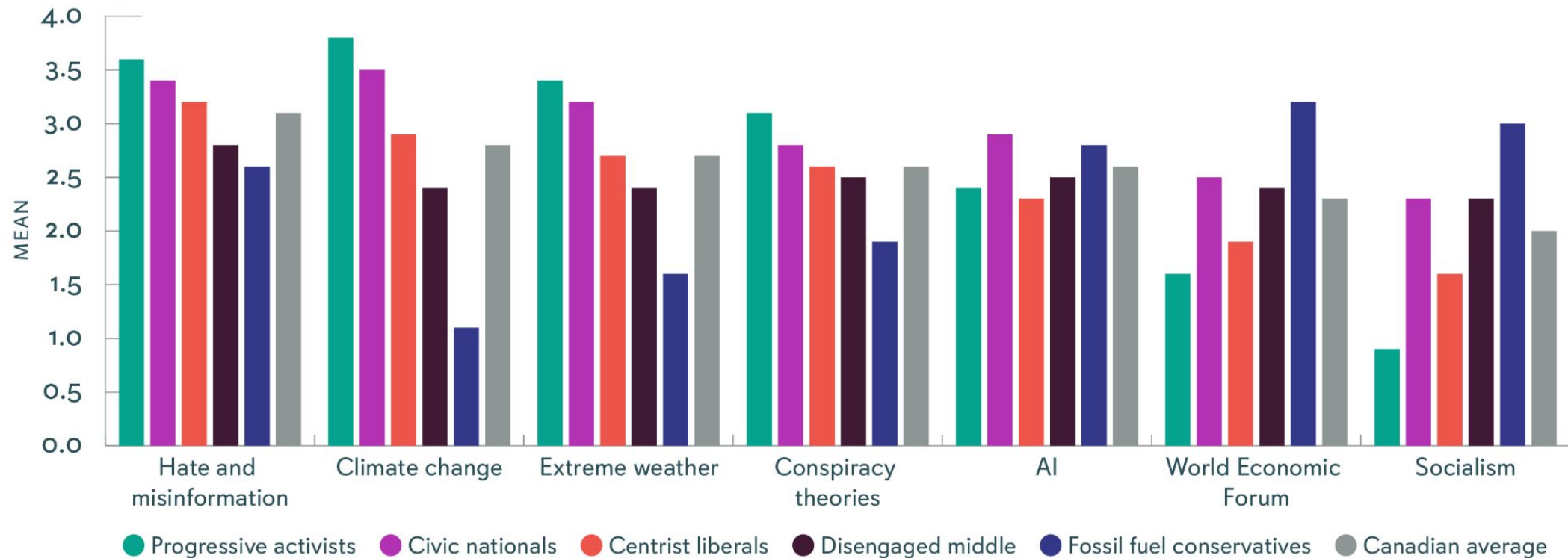
Freedom Convoy

Agree/Disagree: I am sympathetic to the concerns expressed by the Freedom Convoy protest last year in Ottawa

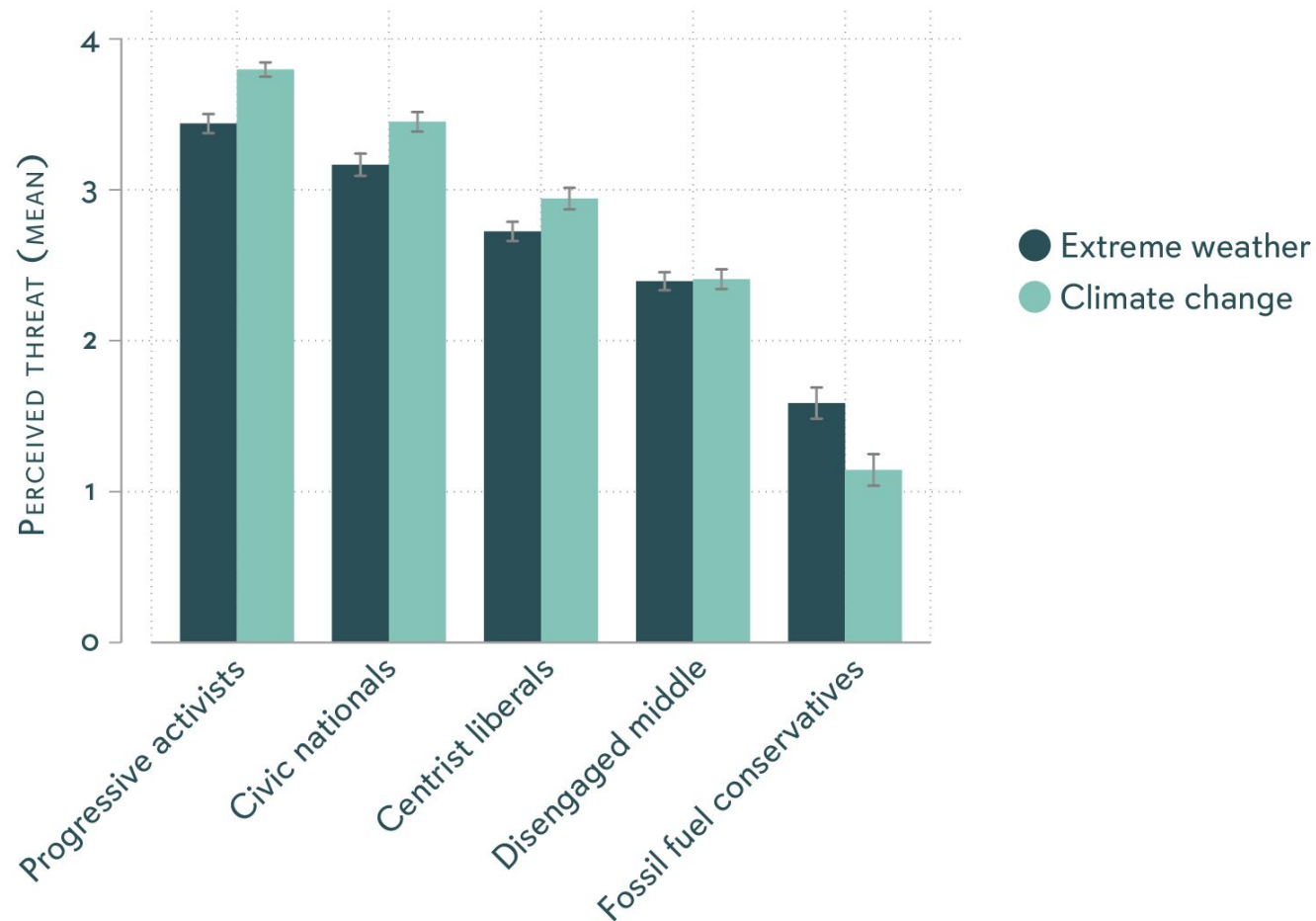


Perceived threats by segment

How much of a threat, if any, do you think each of the following poses to Canadians and to the healthy functioning of society in Canada?



Most segments view climate change as a greater threat than extreme weather



Q: How much of a threat, if any, do you think each of the following poses to Canadians and to the healthy functioning of society in Canada?

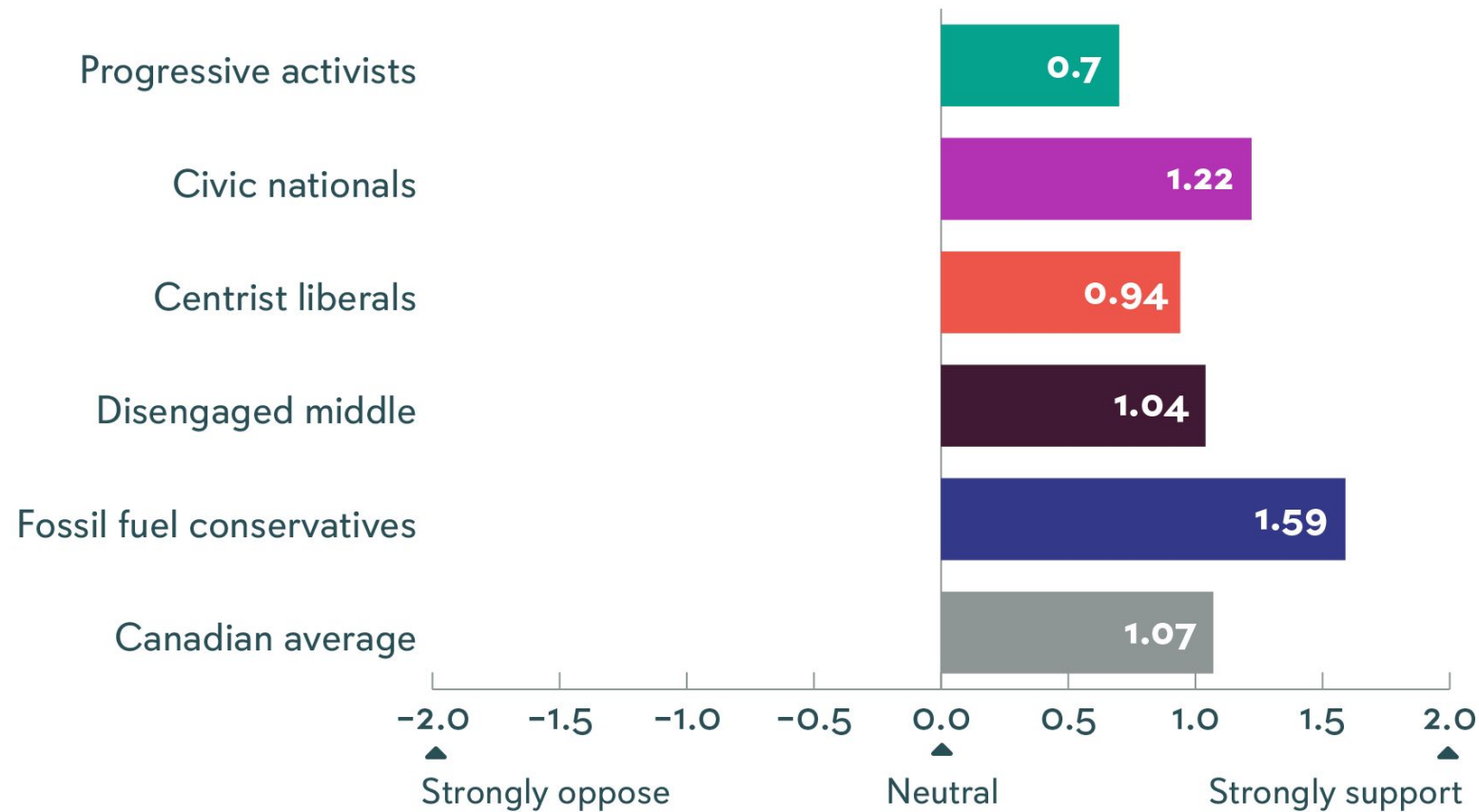
Identical list of option except...

Version A: Climate Change

Version B: Extreme weather

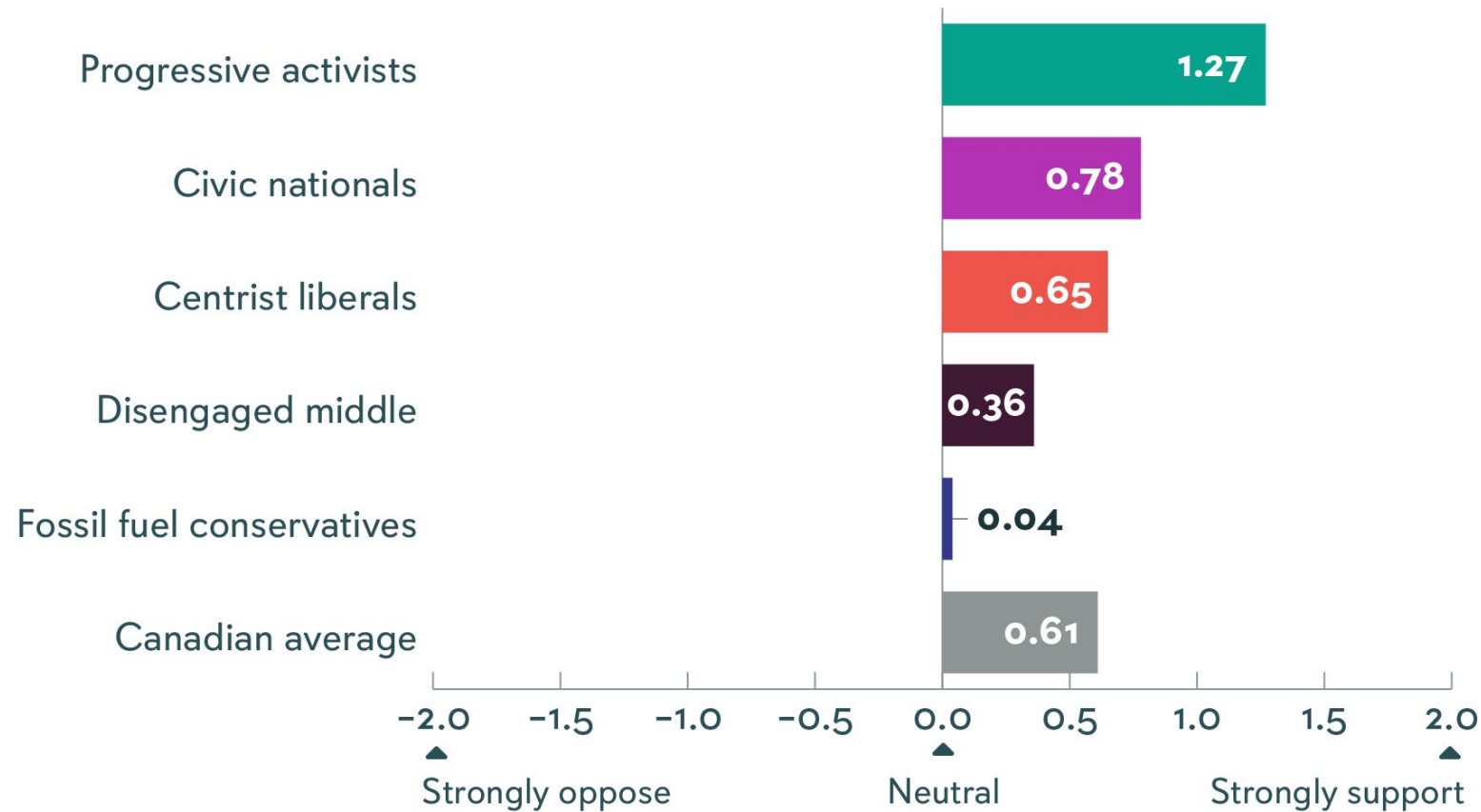
Affordability

Support/Oppose: Remove GST on home heating



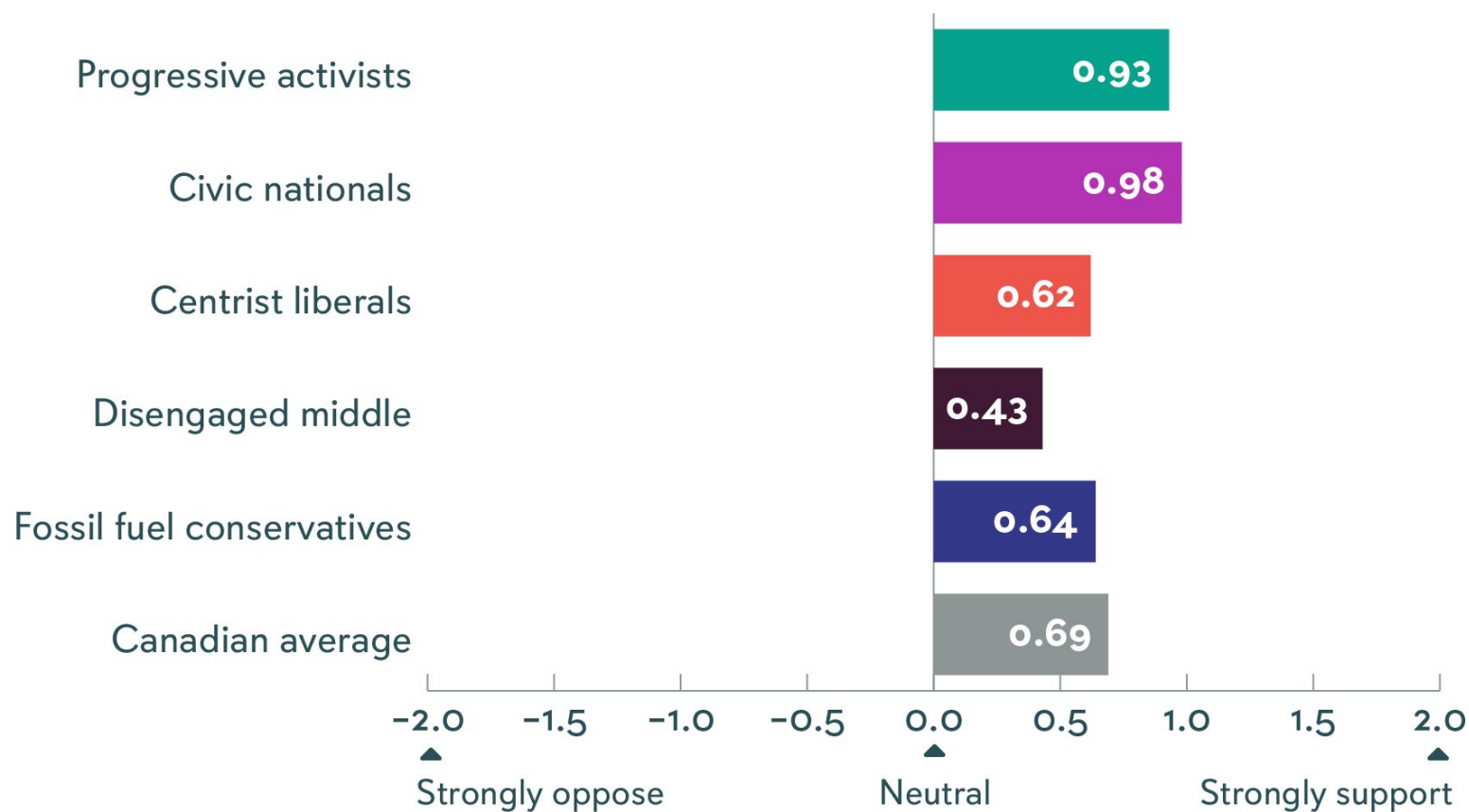
Public health

Support/Oppose: Implement a new publicly funded drug plan



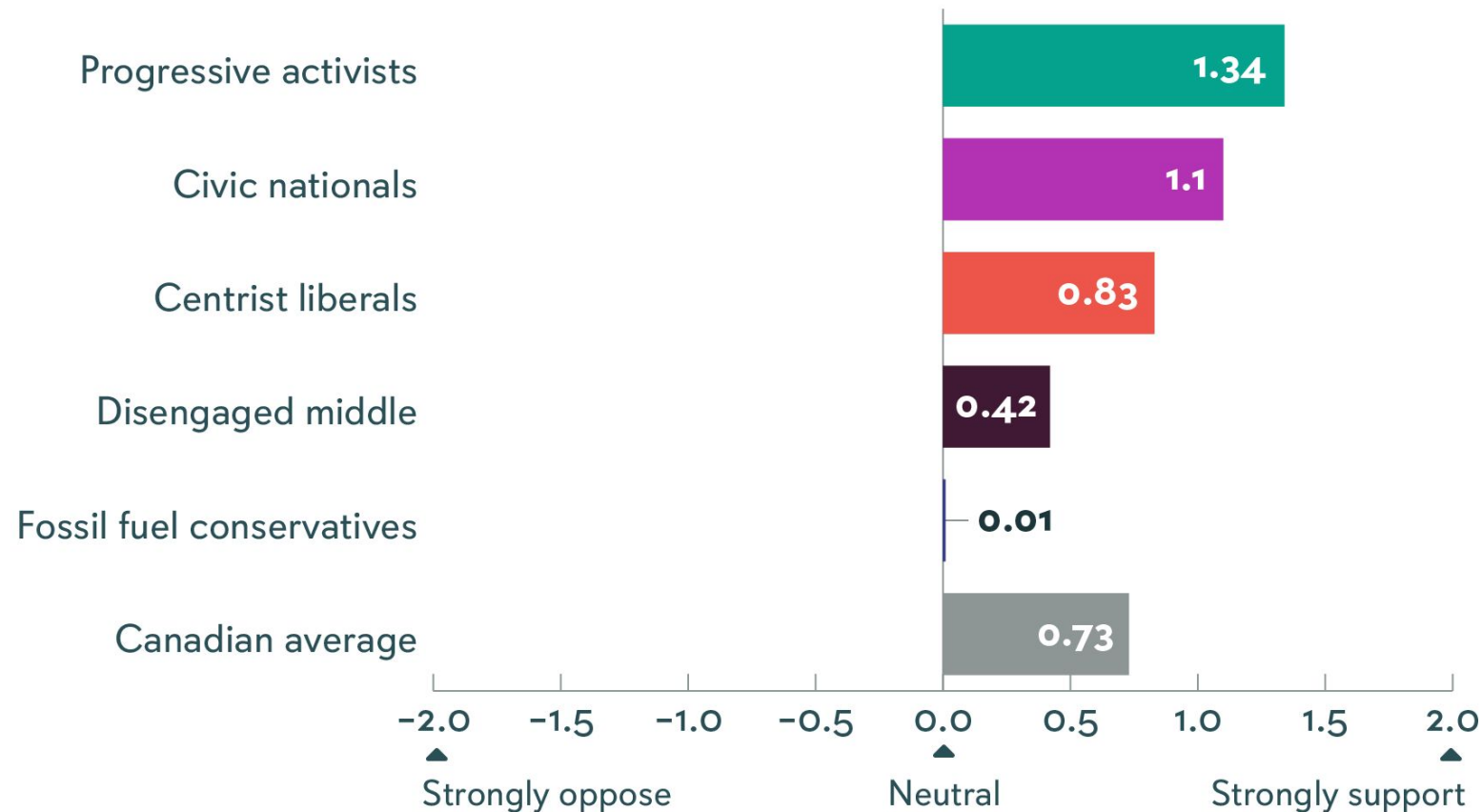
Housing

Support/Oppose: Convert government buildings to residential properties



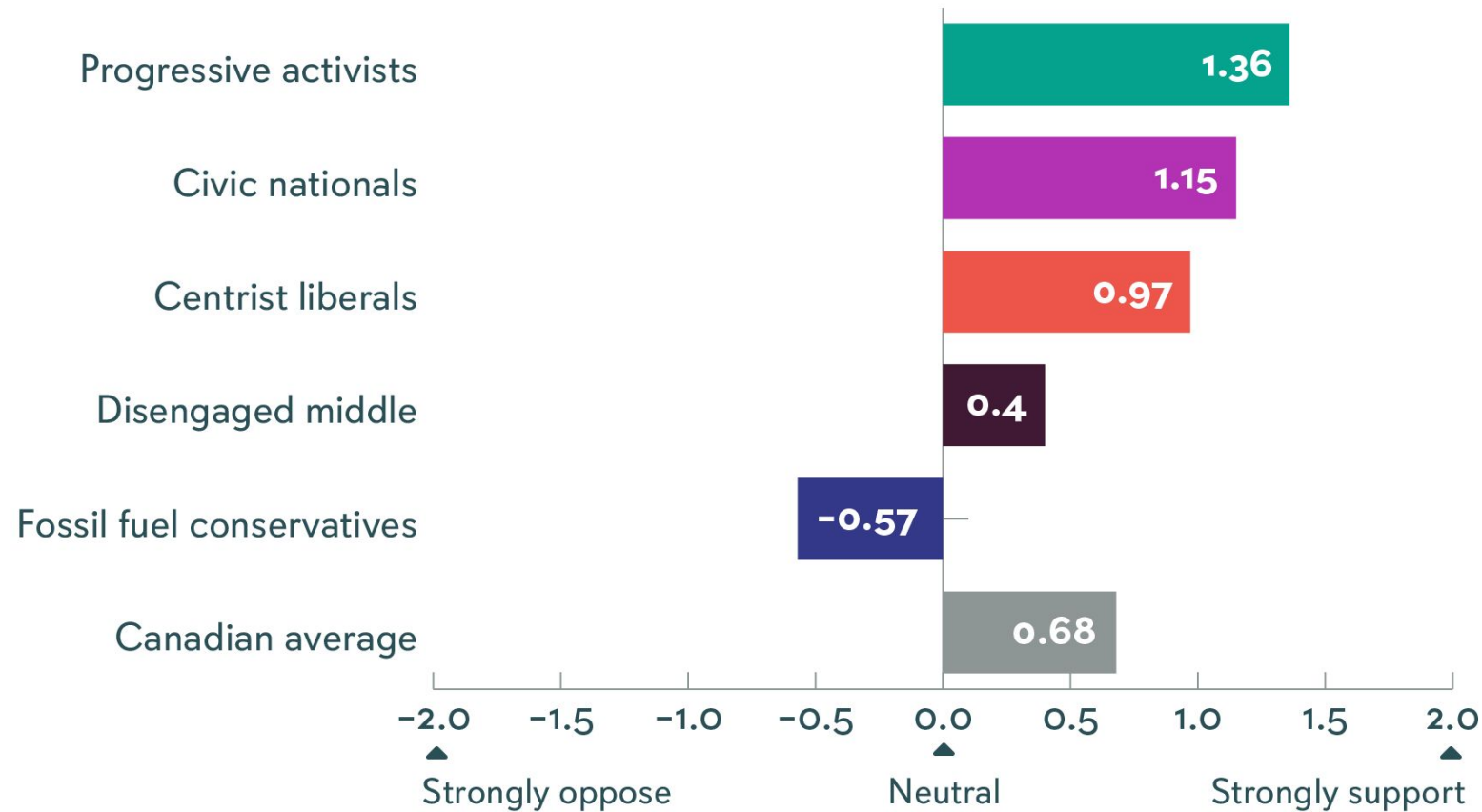
A nationalist coalition supporting local Canadian media against big tech

Support/Oppose: Increase taxes on big tech companies like Google, Facebook and Instagram to compensate producers of local Canadian media content



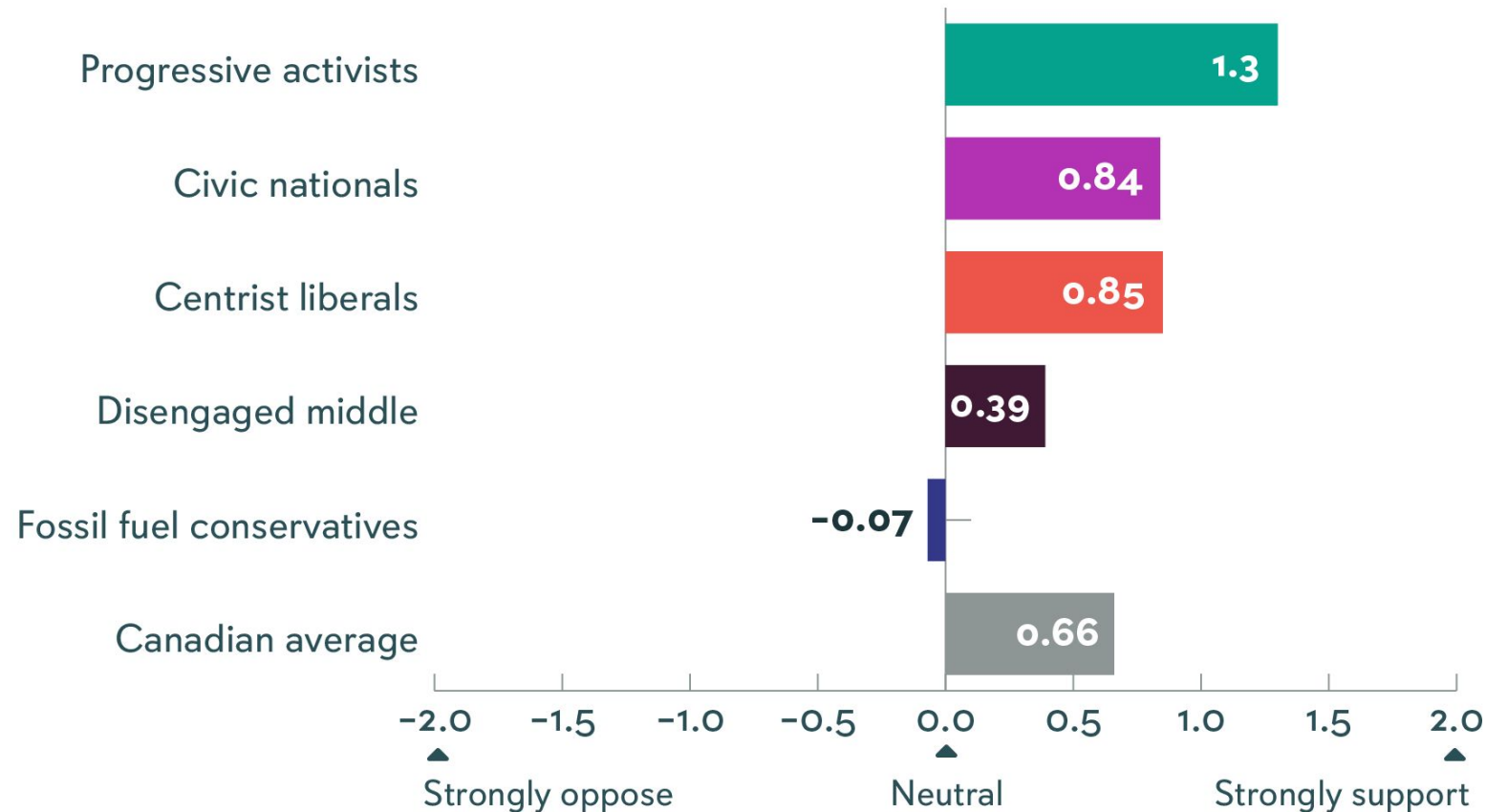
Public safety

Support/Oppose: Strengthen Canada's gun laws



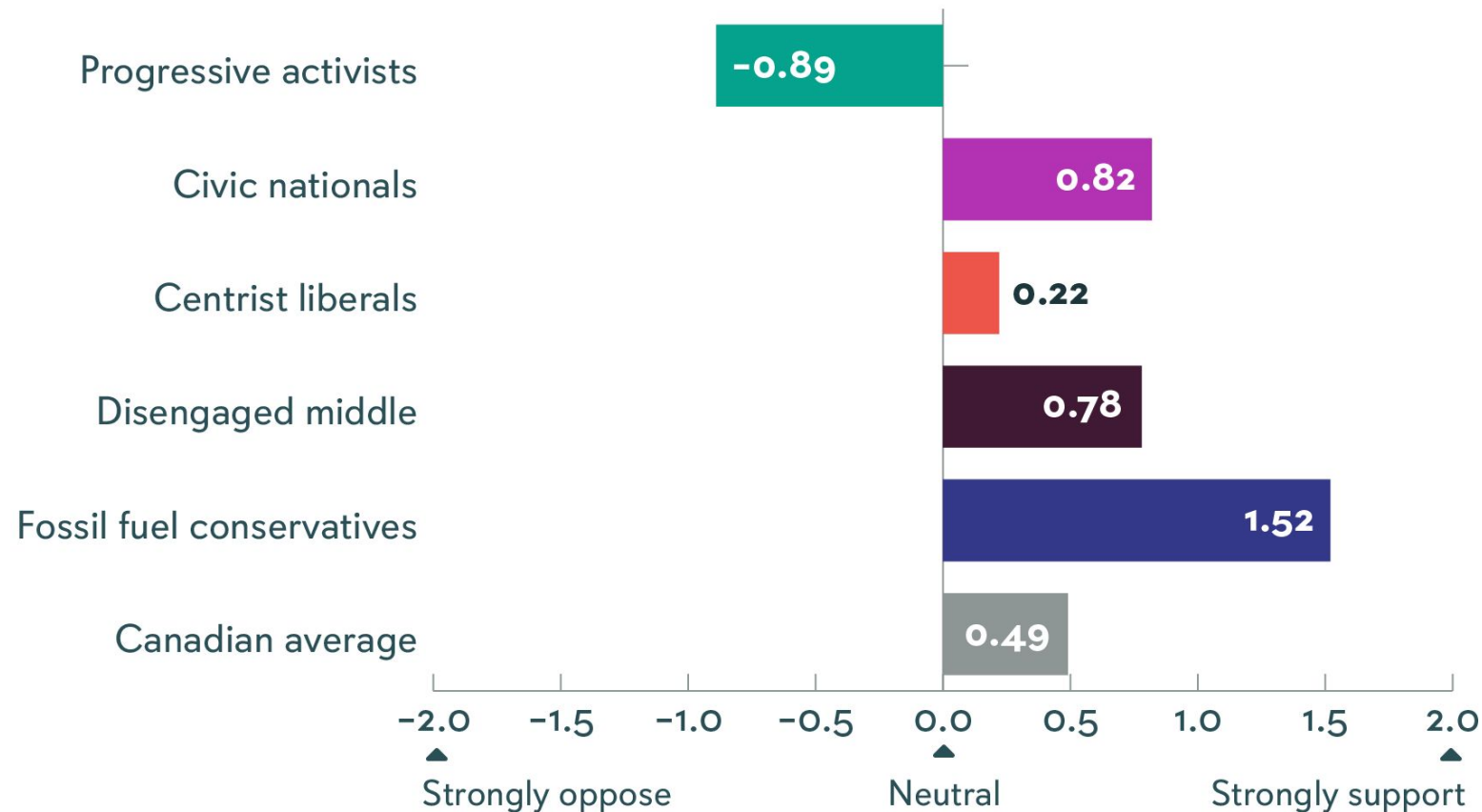
Humanitarianism and social justice

Support/Oppose: Call for an immediate ceasefire in the Israel-Gaza conflict



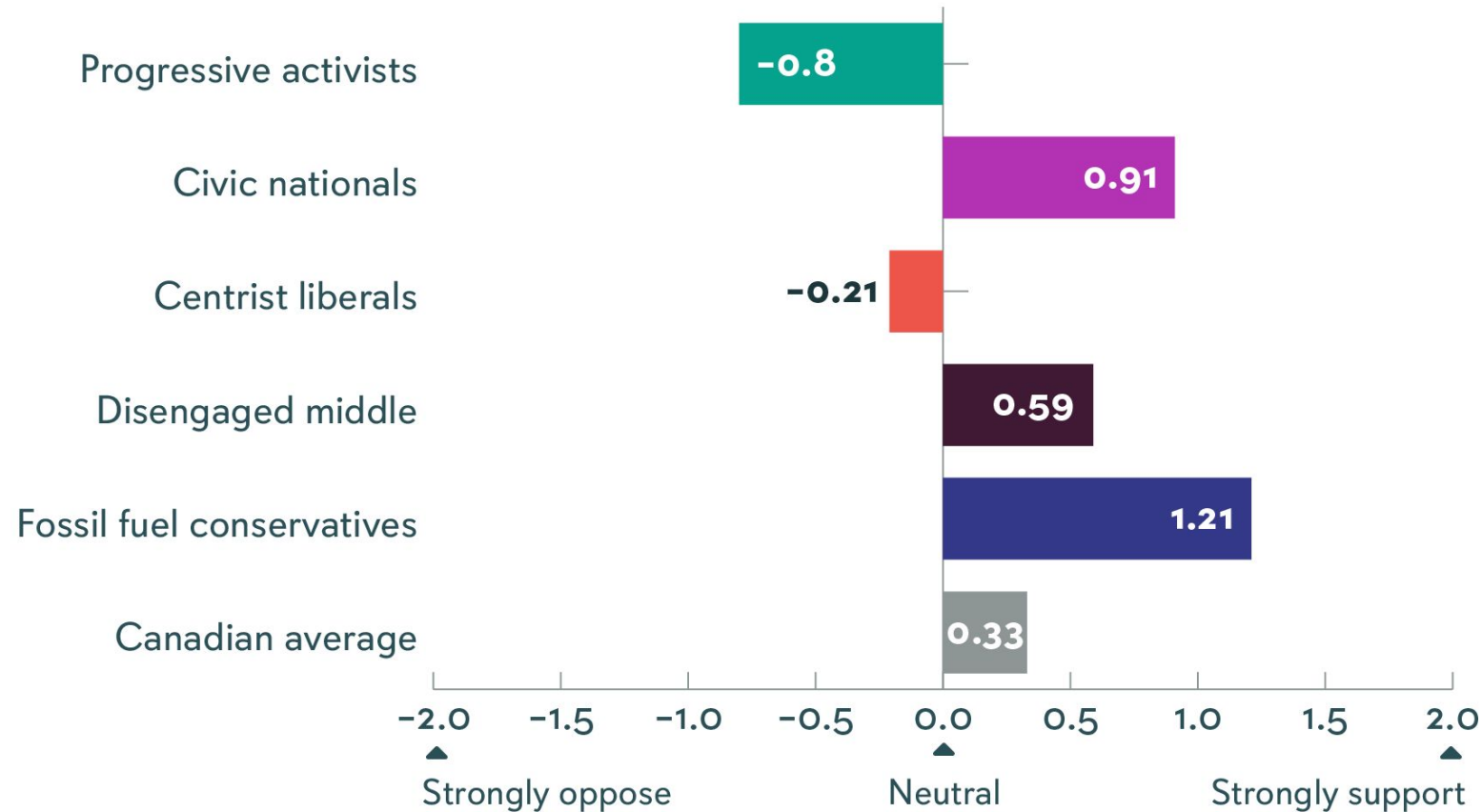
Parental rights

Support/Oppose: Require parental consent before children can change their gender identification at school



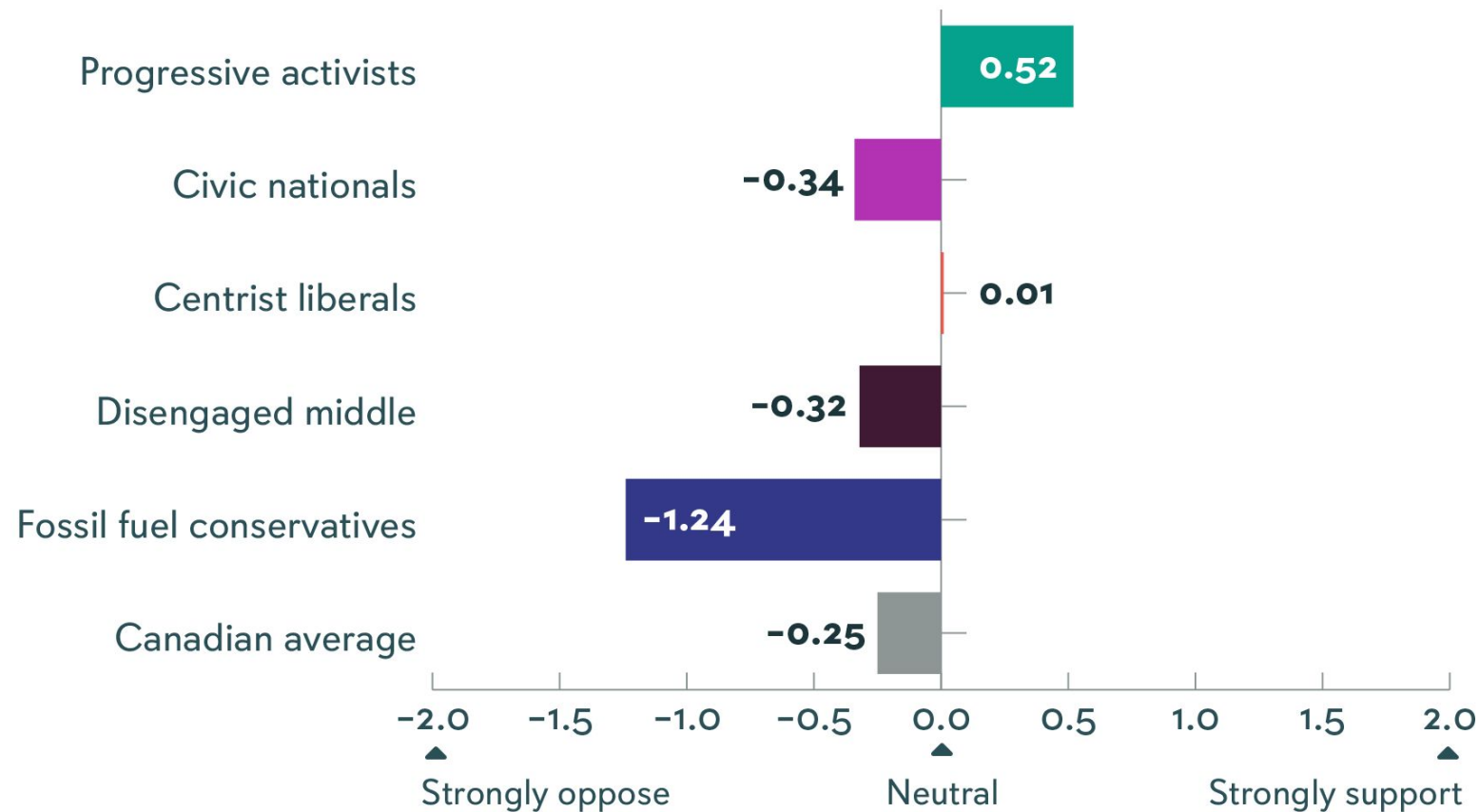
Immigration

Support/Oppose: Reduce immigration levels to Canada

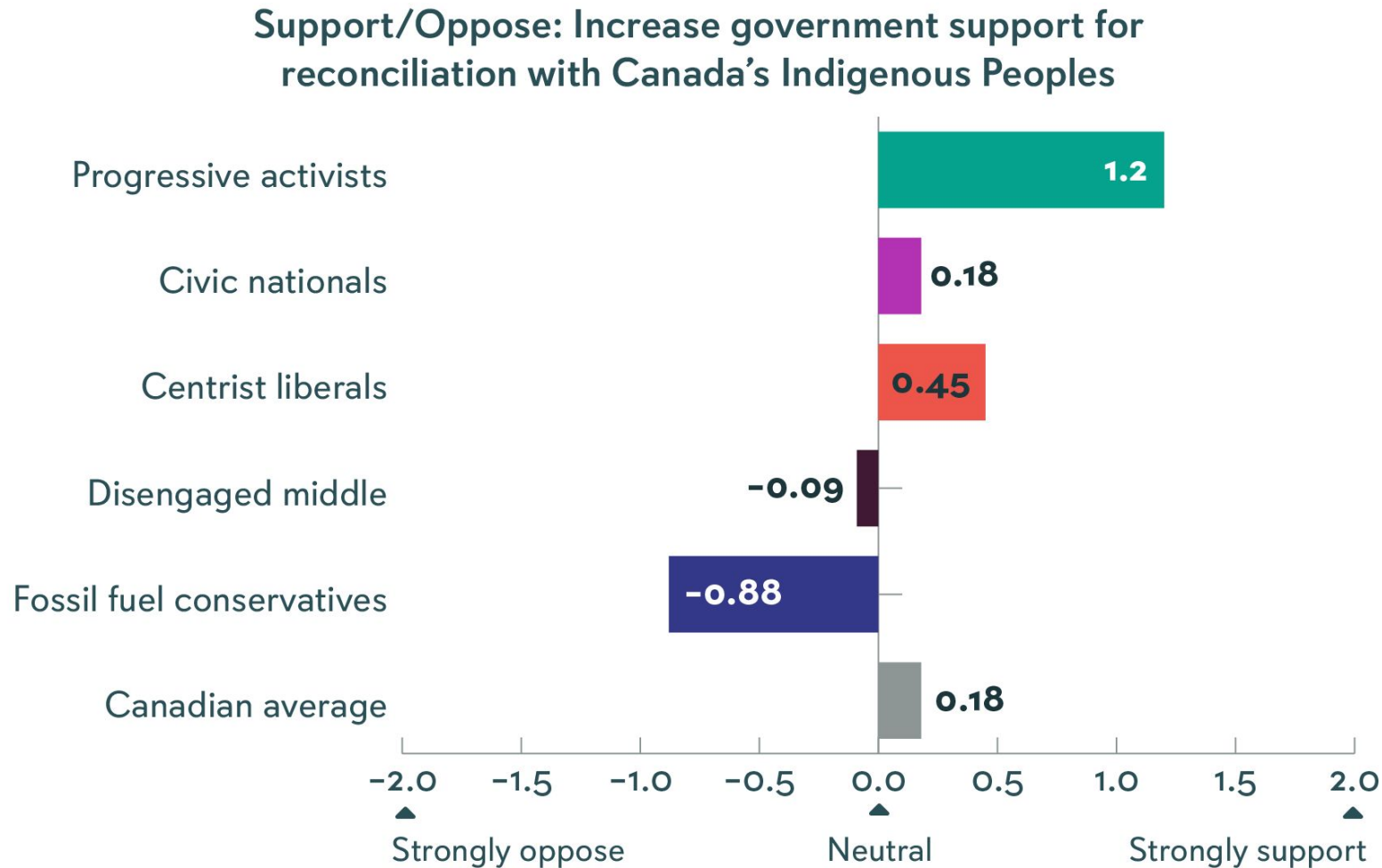


Foreign aid

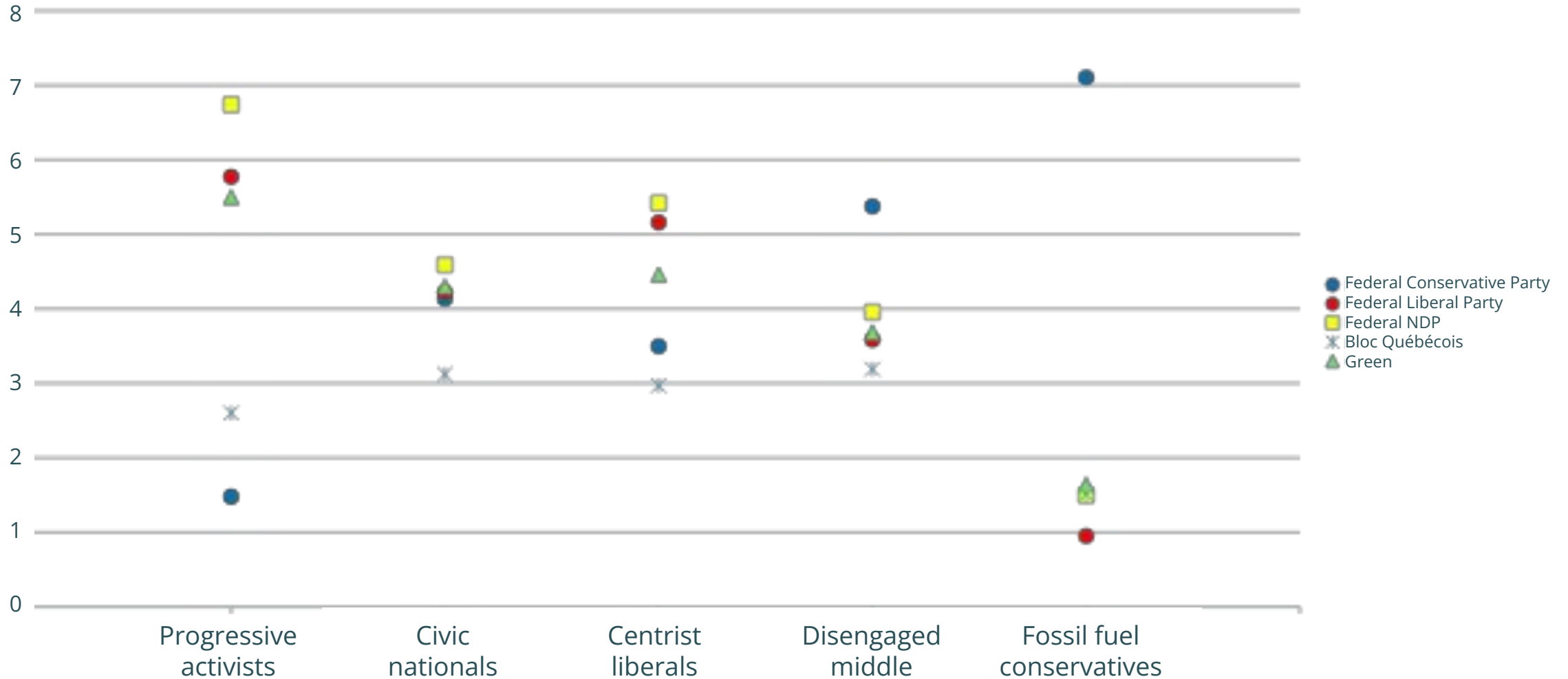
Support/Oppose: Increase foreign aid for developing countries



Reconciliation



Party rating scales by segment



Q: We'd like to know what you think about each of the following political parties and leaders. After the name of the party or leader, please rate it on a scale from 0 to 10 where 0 means you strongly dislike and 10 means you strongly like that party or leader. If you come to a party you haven't heard of or you feel you do not know enough about, just say so.

Media usage habits by segment

	Canadian average	Progressive activists	Civic nationals	Centrist liberals	Disengaged middle	Fossil fuel conservatives
Facebook	60	54	65	60	60	57
YouTube	39	42	37	40	37	40
Instagram	37	47	33	40	39	25
TikTok	17	18	15	16	19	14
X (Twitter)	14	18	11	13	13	14
SnapChat	12	10	12	11	16	6
Reddit	8	13	7	8	6	5
LinkedIN	8	9	7	8	10	6

Q: How often do you use the following social media platforms? (Chart shows % daily users)

Engagement in voluntary associations

Top 5 organizations by segment

	Arts, music or cultural	Conservation, environment, ecology, animal rights	Health organizations	Local action on poverty, housing, inequality	Religious or church organizations	Social justice/humanitarian	Sports and recreation	None of the above
Progressive activists	25%	25%		24%		33%		31%
Civic nationals		12%			14%	11%	13%	48%
Centrist liberals	14%				14%	11%	15%	46%
Disengaged middle			7%	7%	15%		13%	55%
Fossil fuel conservatives			8%	9%	23%		12%	47%

Q: Do you belong to, volunteer for, donate to, or otherwise engage with any of the following types of groups in your community?

Questions and comments

If you have questions or comments on this deck, pls email
contact@ecoanalyticscanada.org