

The Five Canadas at a Crossroads (Part II)

Communicating environmental protection in changing political and economic times

November 10, 2026

ECO INSIGHTS

EcoAnalytics

A project of MakeWay

Today's agenda

Where we left off: The Five Canadas and the political moment (focussed on economic development, economic sovereignty, and a federal government with broad support).

Today's offering

- Testing the limits of the development agenda: Energy expansion, environmental consequences, and competing visions of building Canada
- Defending environmental safeguards: Which arguments and counterarguments influence support?
- Durable strategic frames: Do cost, health, security, or legacy messages work across audiences and issues?
- Tips, recommendations, and discussion

Where we left off: A shifting landscape

- **The Five Canadas remain, but the profiles have evolved:** Climate concern has softened, conservative values have strengthened, and the political middle has shifted
- **Economic security and nation-building now shape the debate:** Affordability, independence from the United States, and major development resonate across audiences
- **Environmental concern and support for development coexist:** Even environmentally engaged Canadians express openness to major development
- **Growth and protection are seen as compatible — until a choice is required:** Most believe the goals can go hand in hand, but growth generally takes priority when respondents are forced to choose
- **Governing coalition has broadened:** It now includes many more environmentally committed voters. Support for the government's broader agenda should not be assumed to imply support for every development decision.

From attitudes to persuasion: What changes support

As noted, Canadians want economic development while continuing to value environmental protection.

This tension could provide an opening for communicators, and raises three questions:

- **Consequences:** Does support change when the environmental and community costs of development become explicit?
- **Safeguards:** Can reviews, consultation, and accountability be integrated with a pro-development narrative?
- **Framing:** Can environmental messages build support across different issues and audiences, or do they need to be tailored for specific audiences?

To answer these questions we conducted five survey experiments, testing how Canadians respond to alternative development proposals, arguments, counterarguments and environmental frames

Meeting the moment:
Building support in a shifting landscape

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Experiment 1: How resilient is support for Canada's energy agenda?

Motivation

- Canada's nation-building agenda includes expanding both oil and gas (O&G) exports and electricity production. But public support may vary depending on exports/domestic consumption and whether consequences are explicit.

Research question

- Is support for expanding domestic electricity production greater than support for expanding O&G for export? Is support sensitive to trade-offs?

What we tested (with different wording)

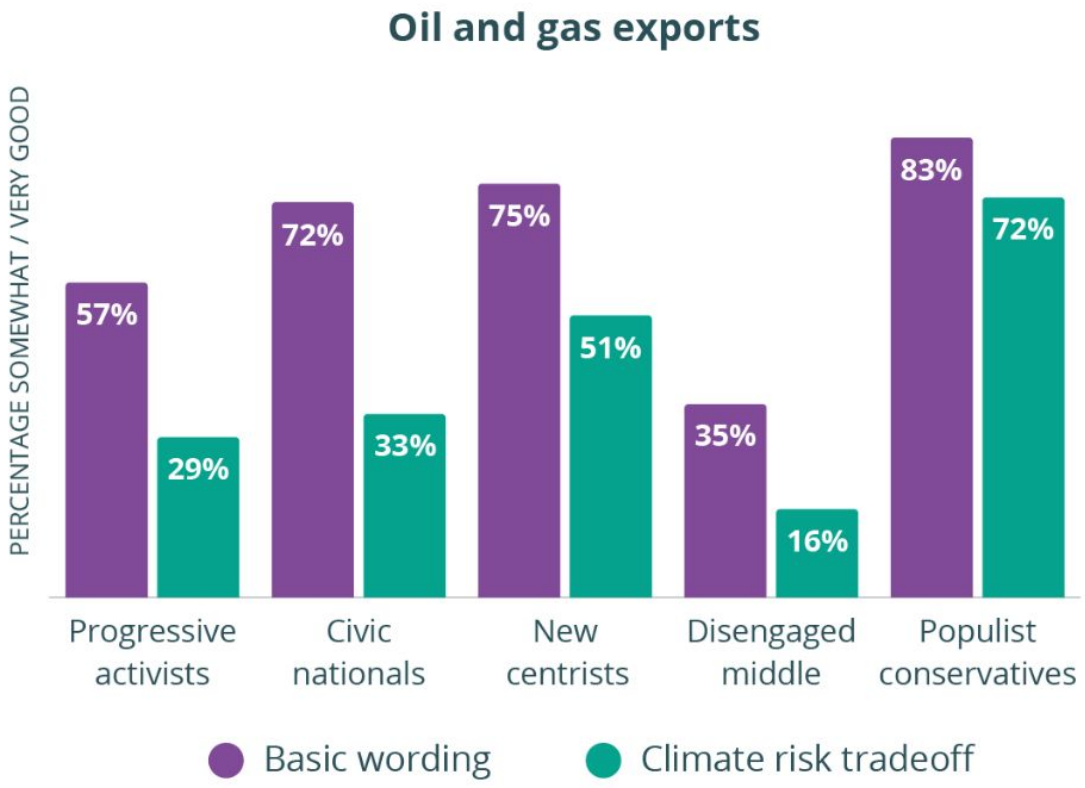
- **O&G expansion:** Producing and exporting more O&G (with vs. without explicitly greenhouse gas and extreme weather consequences)
- **Electricity expansion:** Increasing electricity generation and transmission (with vs. without explicit local infrastructure and community opposition consequences)

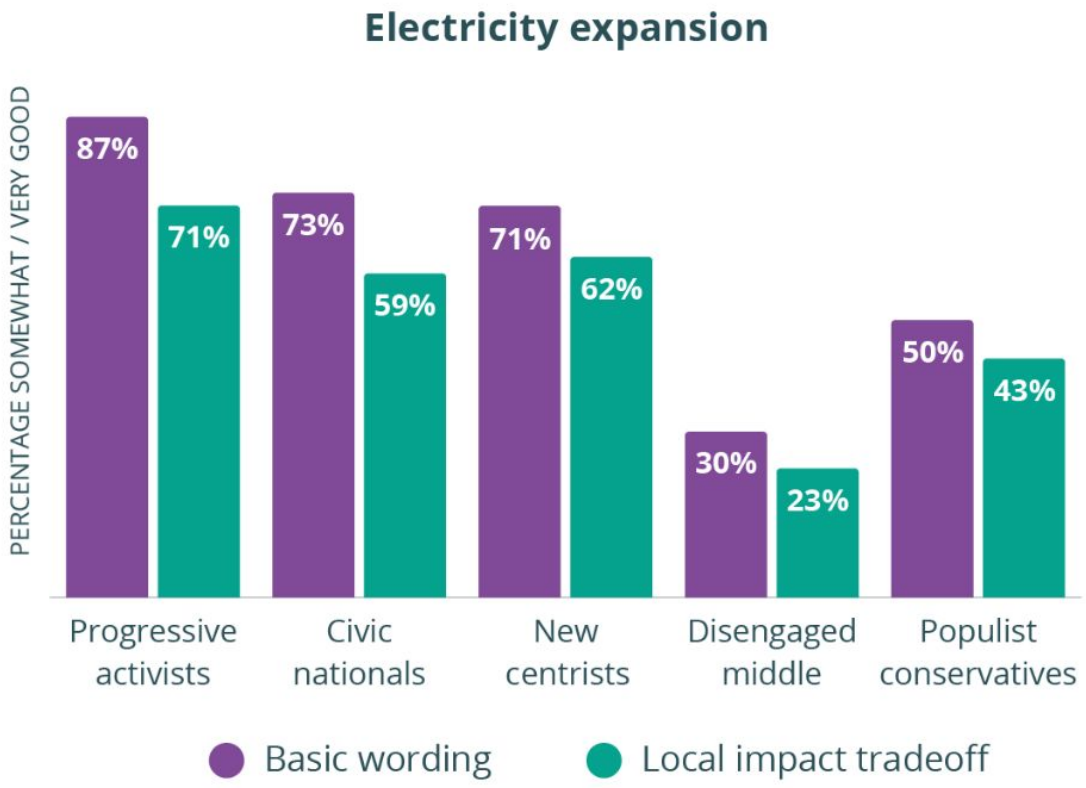
Outcome

- Learning whether respondents considered the proposed approach to be good or bad for Canada.

Naming trade-offs dampens positivity, especially for oil and gas

Overall, do you think this approach is good or bad for Canada?





Experiment 2: Testing alternative visions of building Canada

Can environmental safeguards become part of the case for building Canada?

We tested three narratives

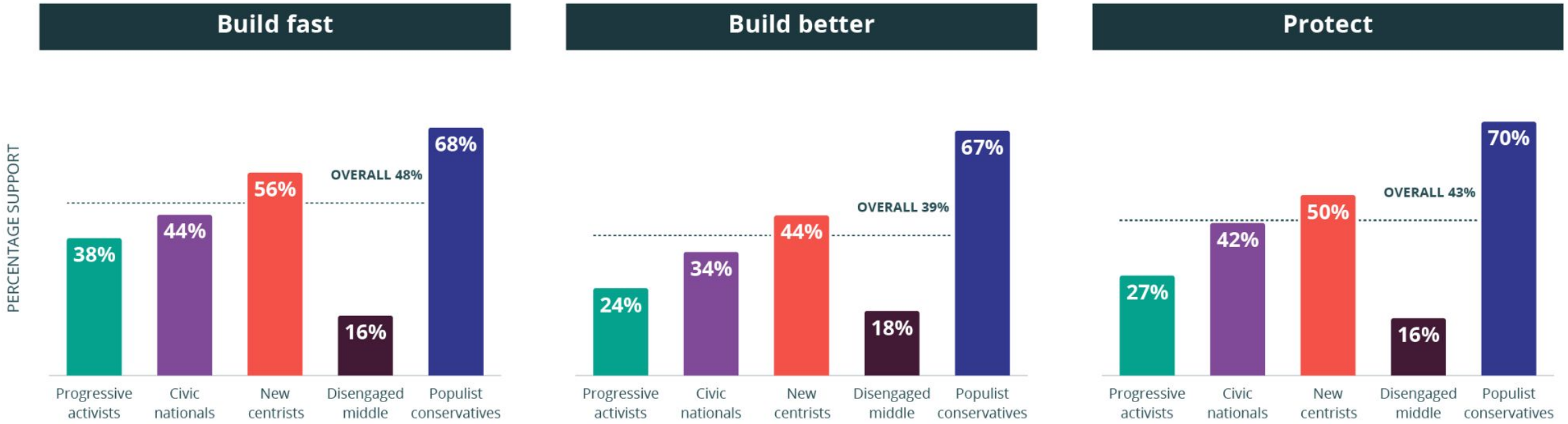
- **Build fast:** Move quickly to create jobs, support growth and strengthen Canada
- **Build better:** Keep strong review and public and Indigenous consultation to identify problems early and avoid costly mistakes
- **Protect:** Protect people, air, water and communities from environmental harm

All three narratives recognized the need for major development in a more uncertain world.
Two narratives then tested distinct justifications for robust review and consultation.

Building better lowers support for fast-tracking

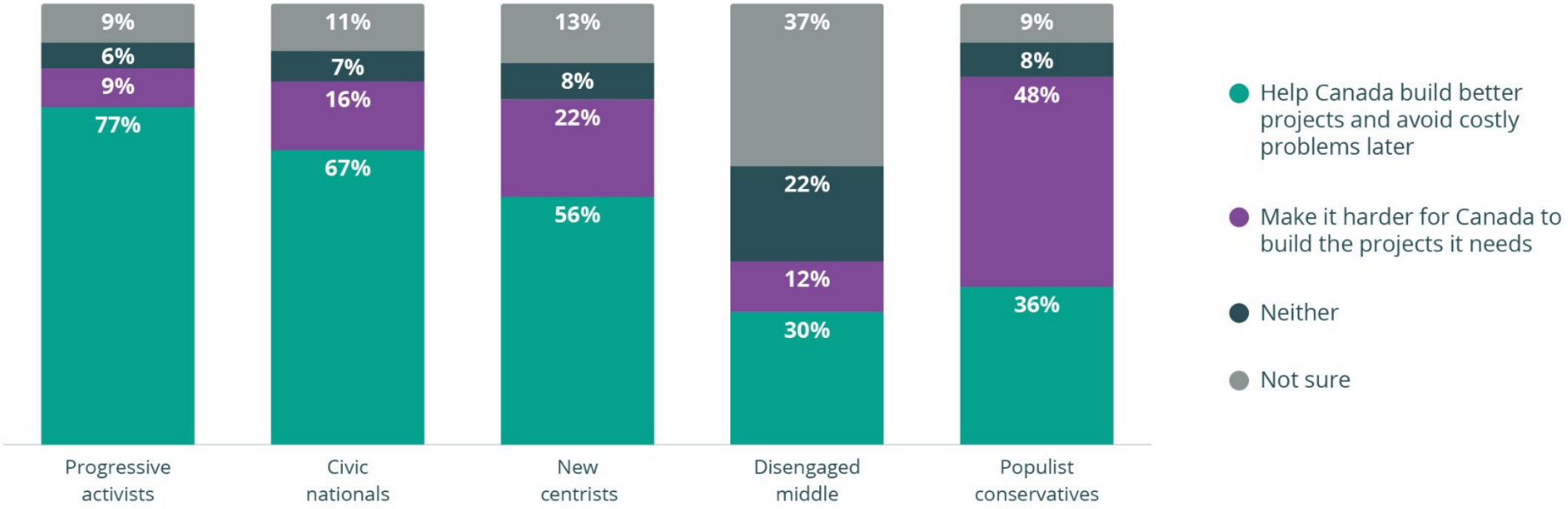
Support/Oppose: Shortening environmental review and public consultation to approve major projects more quickly

Results below show differences in support for fast-tracking across the three narratives



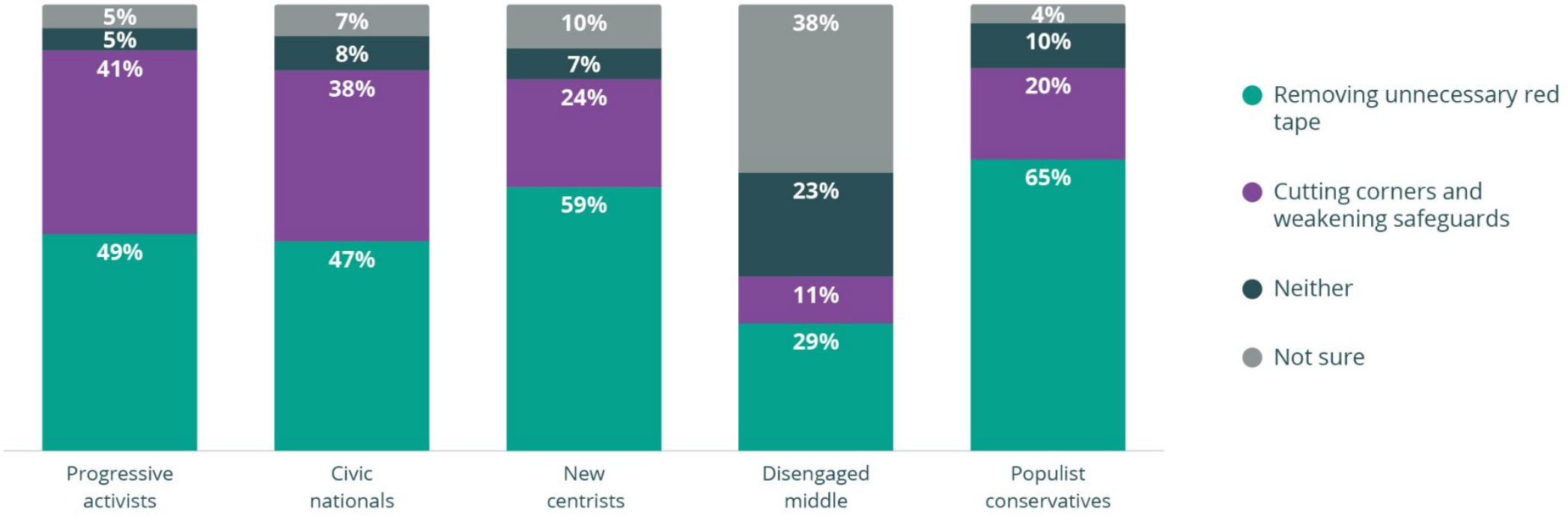
Most see environmental reviews as helping build better projects

When it comes to major economic development projects, environmental review and public consultation mostly...



But “fast-tracking” is viewed positively by most

When governments want to “fast-track” major economic development projects, which comes closest to what you think this means?



Experiment 3: Which arguments challenge the economic case for O&G exports?

Which oil and gas export infrastructure risks are most persuasive?

Favourable arguments

Jobs and communities

Employment and benefits for communities

Exports and investment

Export opportunities and investment

U.S. independence

Less dependence on the United States

Criticisms

Spills and environmental damage

Risks of spills and harm to the environment

Climate consequences

Higher emissions and climate impacts

Public bears the risks

Canadians bear financial and environmental risks

Obsolescence

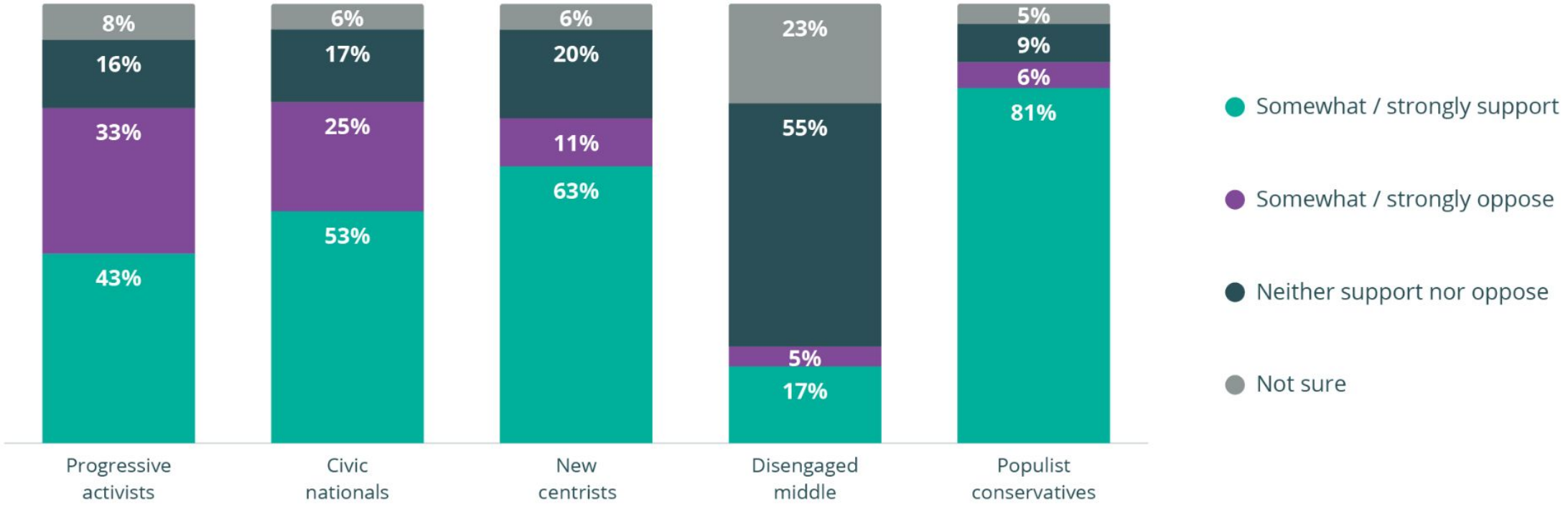
Infrastructure could become obsolete

We then measured support for new oil and gas export infrastructure

Support for export projects outweighs opposition

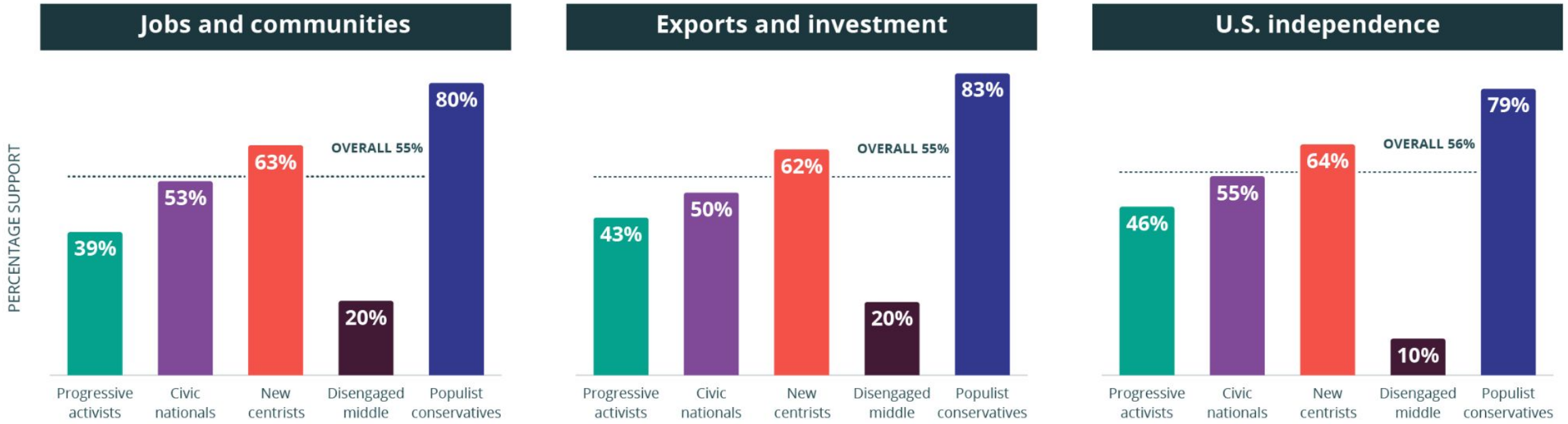
Support/Oppose: Canada building new infrastructure to transport and export more oil and natural gas to international markets

Results pooled across all combinations of arguments and criticisms presented



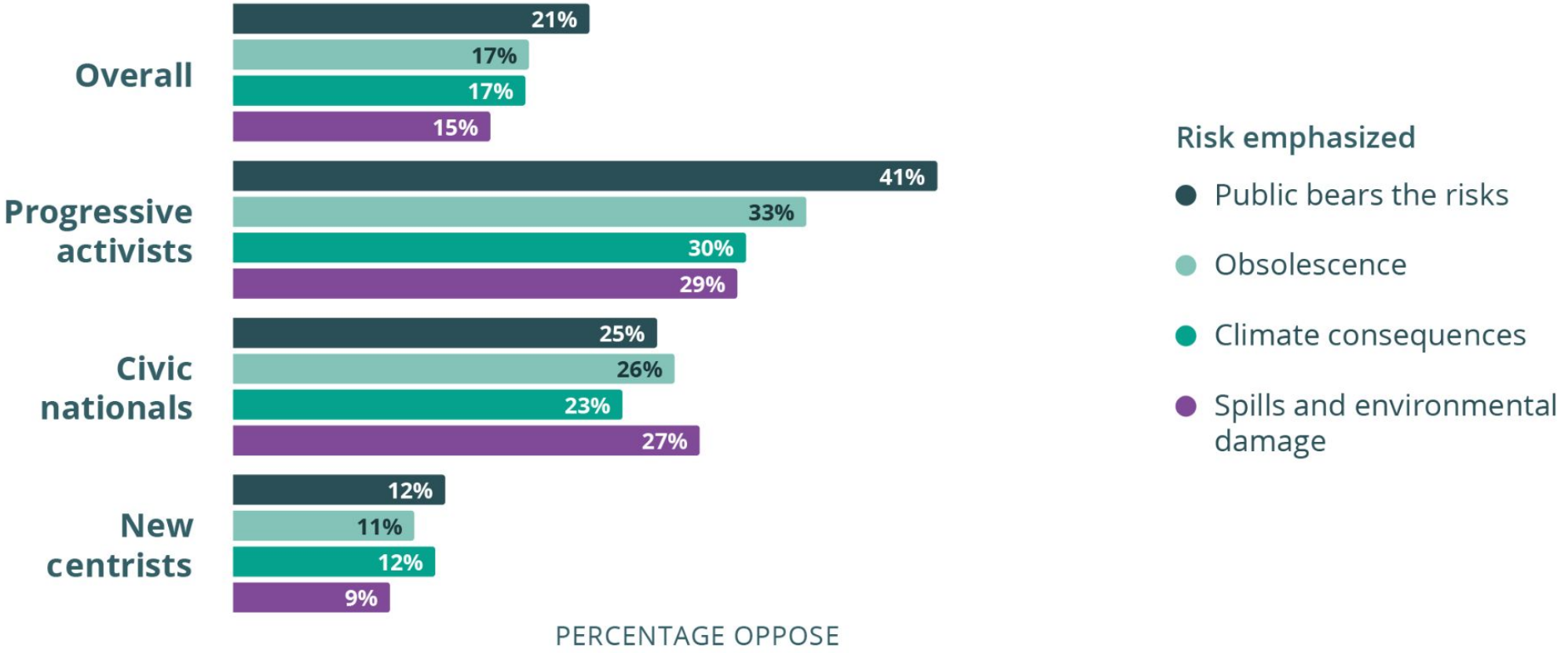
Different justifications, similar support

Support/Oppose: Canada building new infrastructure to transport and export more oil and natural gas to international markets



Public risk draws more opposition, but levels remain low

Support/Oppose: Canada building new infrastructure to transport and export more oil and natural gas to international markets



Experiment 4: Countering the federal agenda

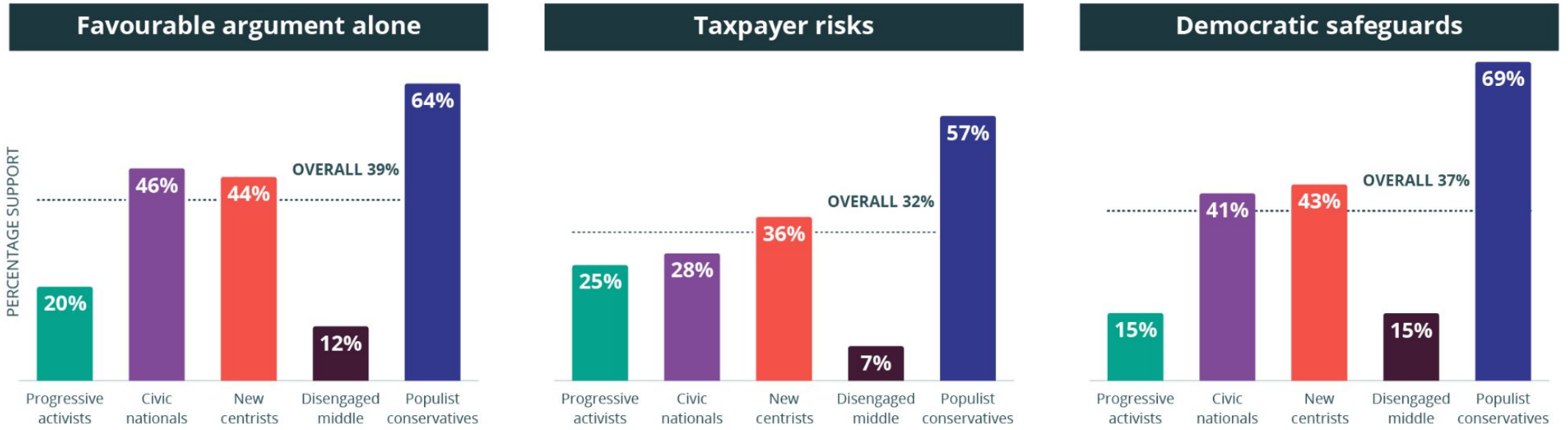
Can we challenge the federal government's development agenda on its own terms?

- **Favourable argument alone:** Baseline condition — government justification with no counterargument
- **Democratic safeguards:** Protect environmental laws and public consultation from being bypassed
- **Taxpayer risks:** Avoid leaving Canadians to pay for projects that fail to deliver
- **Energy control:** Oil and gas exports remain exposed to volatile global markets
- **Private profits / public costs:** Companies get rich while Canadians bear financial & environmental risks
- **Stranded assets:** Long-term fossil fuel investments risk becoming obsolete

We then measured support for new oil and gas export infrastructure, overriding environmental laws and consultation to accelerate projects, and expanding electricity production. We also asked whether Canada should increase oil and gas production even if it means higher greenhouse gas emissions in the near term

Taxpayer risk arguments weaken willingness to override environmental protections

Support/Oppose: Allowing the federal government to override existing environmental laws and regulations to speed up approval of major projects it declares to be in the national interest



Support for development is contingent on safeguards

Consequences matter: Support for oil and gas expansion declines when climate impacts are made explicit.

Describe safeguards as strengtheners: Reviews and consultations can be presented as powerful tools for *building* better projects, rather than barriers to progress.

Who bears the risks matters: Financial-risk and accountability arguments offer ways to blunt support for fast-tracking measures.

Experiment 5: Durable strategic frames

We tested the efficacy of four frames across three issues.

Environmental frames

Cost

Avoidable costs Canadians ultimately pay

Health

People's health, safety and quality of life

Security

Canada's safety, resilience and preparedness

Legacy / Identity

Natural identity and what future generations inherit

Policy issues

AI data-centre safeguards

Stronger review and electricity/water standards, even if developers face higher costs

Conservation

New areas to protect forests, wetlands and wildlife, even if this limits land available for development

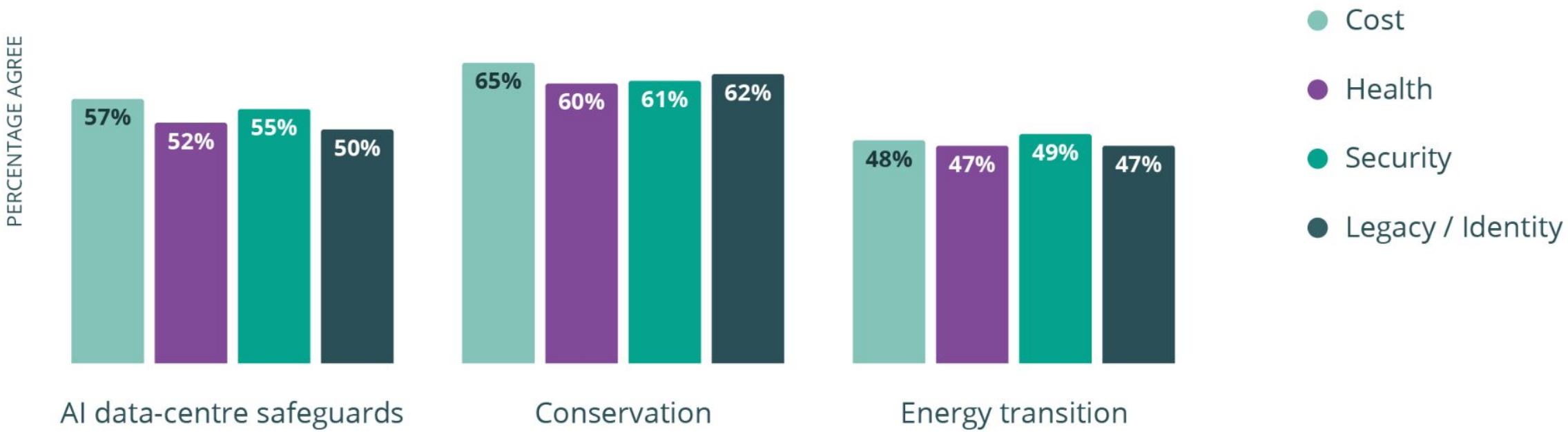
Energy transition

A faster shift to cleaner energy and electrification, even with disruption and adjustment costs

No outright winner: Effective framing depends on context

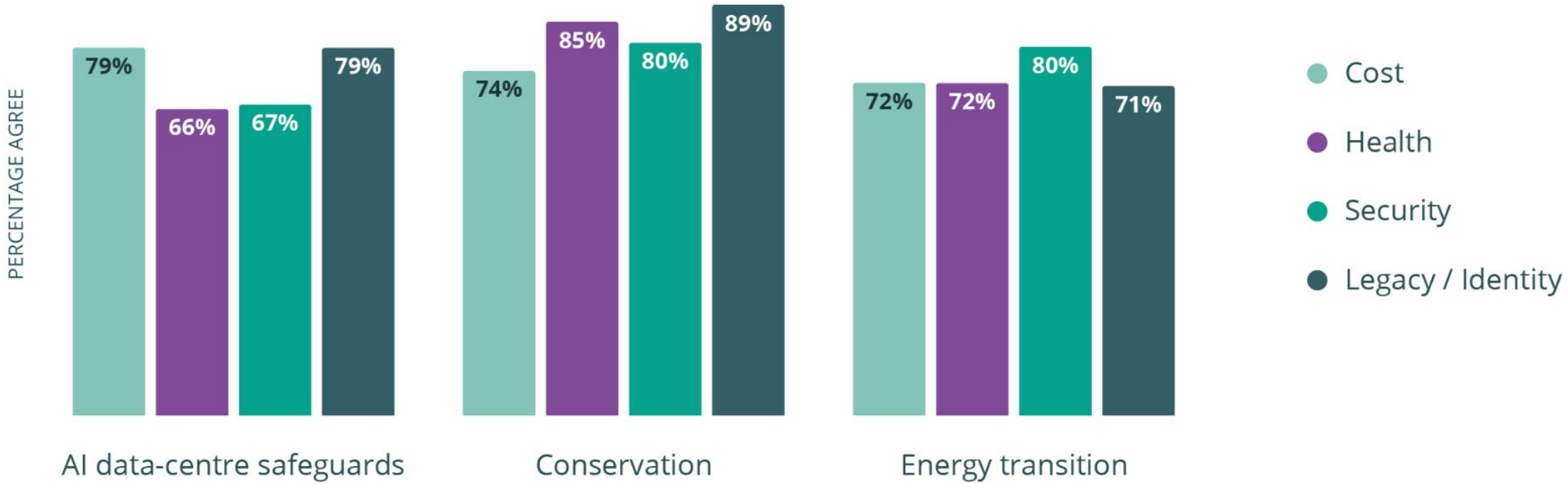
No frame outperformed the others across the three issues. Some issue- and audience-specific patterns show promise (but smaller subgroups make estimates imprecise).

Agree/Disagree: I would personally support this proposal



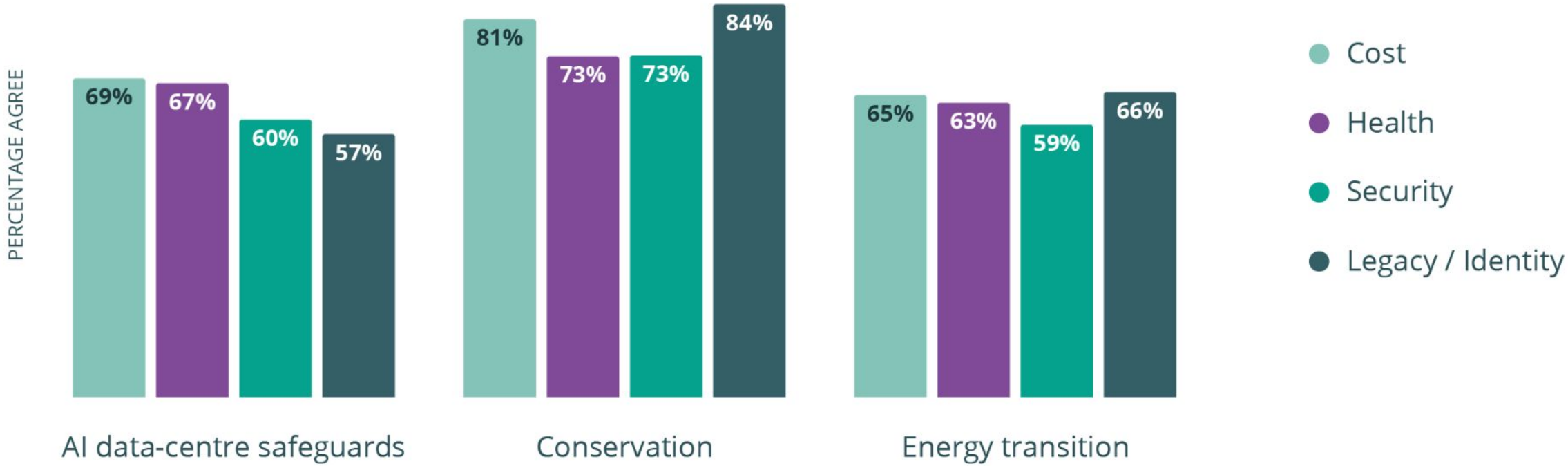
Best frames for Progressive activists, by issue: cost and legacy, legacy and security

Agree/Disagree: I would personally support this proposal



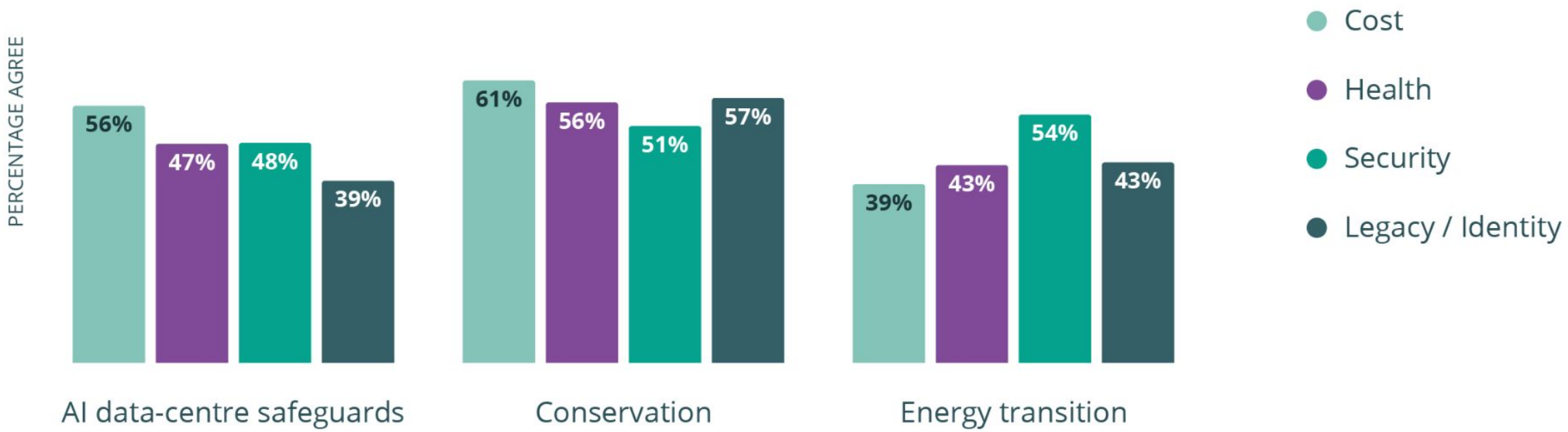
Best frames for Civic nationals, by issue: Cost, legacy and legacy

Agree/Disagree: I would personally support this proposal



Best frames for New centrists, by issue: Cost, cost and security

Agree/Disagree: I would personally support this proposal



Notes & recommendations to meet the moment

Shifting landscape, emerging opportunities

1. **The Five Canadas have evolved. Your strategies to engage them should, too**

Climate concern has softened, conservative values have hardened, and middle-grounders have moved right. Progressive activists and Civic nationals remain core environmental audiences, while New centrists represent an important, more economically oriented audience for building broader support.

2. **Preference for growth-first does not indicate lack of concern for environmental protection**

Canadians are focused on nation-building, economic security, and independence. Yet many who prioritize growth believe economic development and environmental protection can go hand in hand. ENGOs should not give way to opposition frames that depict growth & environmental protection as mutually exclusive.

3. **Environmental concern does not automatically translate into opposition to development**

Support for O&G expansion is substantial, including among the environmentally concerned. Explicitly identifying potential negative impacts weakens that support; so connect the dots, highlighting the environmental risks of specific projects.

Canadians want development, but the terms matter

4. Environmental safeguards can be defended as part of building better

Canadians generally see environmental reviews and consultation as contributing to better projects, even as fast-tracking is seen in positive light by many. Arguments about avoiding costly mistakes, protecting taxpayers and ensuring accountability could allow you to defend environmental safeguards within a pro-development narrative.

5. There is no singular winning frame

Cost, legacy, and security frames work well for particular audiences and issues. Effective communications, however, require attention to both the audience and the policy context — and further testing before scaling.

6. *Courage!* Opportunity knocks

Environmental NGOs can engage with Canada's development ambitions, helping shape which projects move forward, how they are evaluated, and which risks Canadians are asked to accept.

Recommendation 1: Make protection part of building a stronger Canada

Adopt the nation-building frame and connect environmental priorities to economic and national resilience

- Affordability, economic security, greater independence from the US, and major development all resonate across audiences, including Progressive activists. Make the case for how environmental protection contributes to Canada's independence, economic security, resilience, and long-term prosperity.

Challenge belief that development & protection are mutually exclusive; insist promises of protection be proven

- Many Canadians who support growth above all believe environmental protection and economic development can coexist. Build on this shared premise by challenging specific projects where accelerated approvals, and weakened safeguards fail to deliver on both objectives.

Connect environmental protection to national identity

- Canada's natural landscapes, quality of life, and long term prosperity offer opportunities to connect environmental priorities to national pride and a shared vision of the country's future.

Recommendation 2: Question the terms, not just the speed, of development

Make the consequences of specific development decisions visible

- Support for O&G expansion declines significantly when climate impacts and other consequences are made explicit. Connect proposed projects to their possible climate, environmental, community, and financial impacts: Don't assume these are self evident, even among concerned Canadians.

Make "building better" the alternative to "building faster"

- Advocate for environmental reviews and consultation as powerful tools for identifying problems early, avoiding costly mistakes, and delivering better projects — not as constraints or red tape.

Connect environmental safeguards to public accountability and financial responsibility

- Emphasize who's at risk when projects fail. Taxpayer-risk arguments reduce support in some audiences for overriding environmental safeguards. Challenge proposals that weaken these, transferring risks to taxpayers.

Recommendation 3: Broaden support with targeted, evidence-based communication

Build support across key audience segments, recognizing their different priorities

- Progressive activists and Civic nationals remain strongly concerned about the environment, though many favour major development. Broaden support by engaging more economically oriented New centrists, as well.

Connect to audience priorities

- Affordability, economic security, Canadian identity, and environmental protection offer different entry points. Match arguments to the concerns and values of the segments you seek to engage.

Adapt messaging to both issue and audience

- Cost narratives show promise for data-centre safeguards and conservation, particularly among New centrists; legacy stands out for conservation among Progressive activists and Civic nationals; and security for the energy transition among Progressive activists and New centrists.

Test promising approaches before scaling

- These patterns offer useful directions for further testing, rather than established winning frames. Further testing on these data could look at whether political (re)alignment adds explanatory values to audience segmentation rather than assuming that all members of a segment respond alike.

Redefine what responsible building means

The opportunity is to redefine what *building Canada responsibly* means

Canadians want a stronger, more prosperous, and more independent country.

But supporting development does not mean accepting every project, every risk, every shortcut.

Environmental organizations have an opportunity to make accountability central to Canada's nation-building agenda via sound decision-making that protects nature.

Circling back on the Five Canadas

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Why a new classification?

- **The original Five Canadas** were developed from patterns of attitudes and values observed in 2023, using 17 segmentation indicators
- **Applying the 2023 classification to 2026 allows us to track change,** but assumes that the relationships between attitudes and values defining each group have remained stable
- **Our statistical tests suggest that this assumption no longer holds**. The updated classification provides a better fit to the 2026 data, with clearer segment assignments
- **Updating the model allows us to better capture how public opinion is organized today,** rather than forcing respondents into profiles developed three years earlier

What does this mean moving forward?

- **The updated 2026 classification better captures how attitudes and values fit together today**, with clearer distinctions between groups and less uncertainty in segment assignments
- **Either the original 2023 classification or the 2026 could be used for tracking change over time**, as long as the same classification is applied consistently across survey years, but the updated classification provides a stronger foundation for understanding and engaging today's audiences
- **Our key findings for Progressive activists and Civic nationals remain broadly consistent across classifications**, reinforcing confidence in previous research and strategies developed around these groups
- **Profiles at both ends of the spectrum show greater continuity, while the middle has undergone more substantial reorganization.** This suggests that middle audiences may be more responsive to changing contexts, highlighting the importance of periodically revisiting and validating the segmentation
- **The updated classification offers a clearer picture of these middle audiences**, providing fresh insights to inform future research and engagement strategies

Questions?



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