



ABACUS DATA

A New Conversation

Restarting the politics of environment and economy



CONTEXT

- DEARTH OF POLICY INNOVATION
- GREATER FISCAL, POLITICAL FLEXIBILITY
- FEWER “NO-GO” IDEAS, IDEOLOGICAL BARRIERS
- LESS ATTENTIVE, MORE OPEN MINDED PUBLIC

APPROACHES TO AVOID

- SWEEPING, GRAND VISION
- WRENCHING CHANGE, EMPHASIS ON SACRIFICE
- FORCING PUBLIC TO VOTE/CHOOSE SIDES
- STRESSING URGENCY, CRISIS AT HAND

WHAT WORKS BETTER

- SIMPLE, ALMOST SELF-EVIDENT GOAL
- PRAGMATIC, BALANCED IMPROVEMENTS
- CHANGE OVER TIME, FOR THE RIGHT REASONS
- QUIET ACQUIESCENCE, BROAD CONSENSUS




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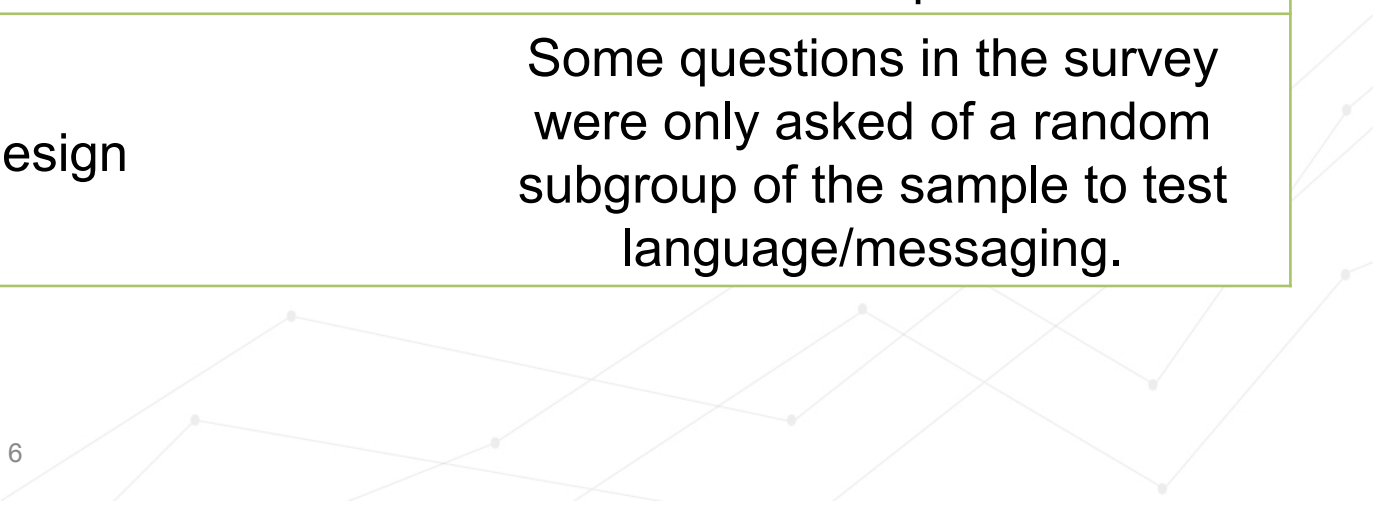
Public Opinion Data

Sustainable Prosperity Leadership Group
September, 2014



Methodology

Online Survey	2,807 Canadians aged 18 and over
Field dates	September 18 to September 30, 2014
Statistical Weighting	Data was weighted by age, gender, education and region within each province
Experimental Design	Some questions in the survey were only asked of a random subgroup of the sample to test language/messaging.

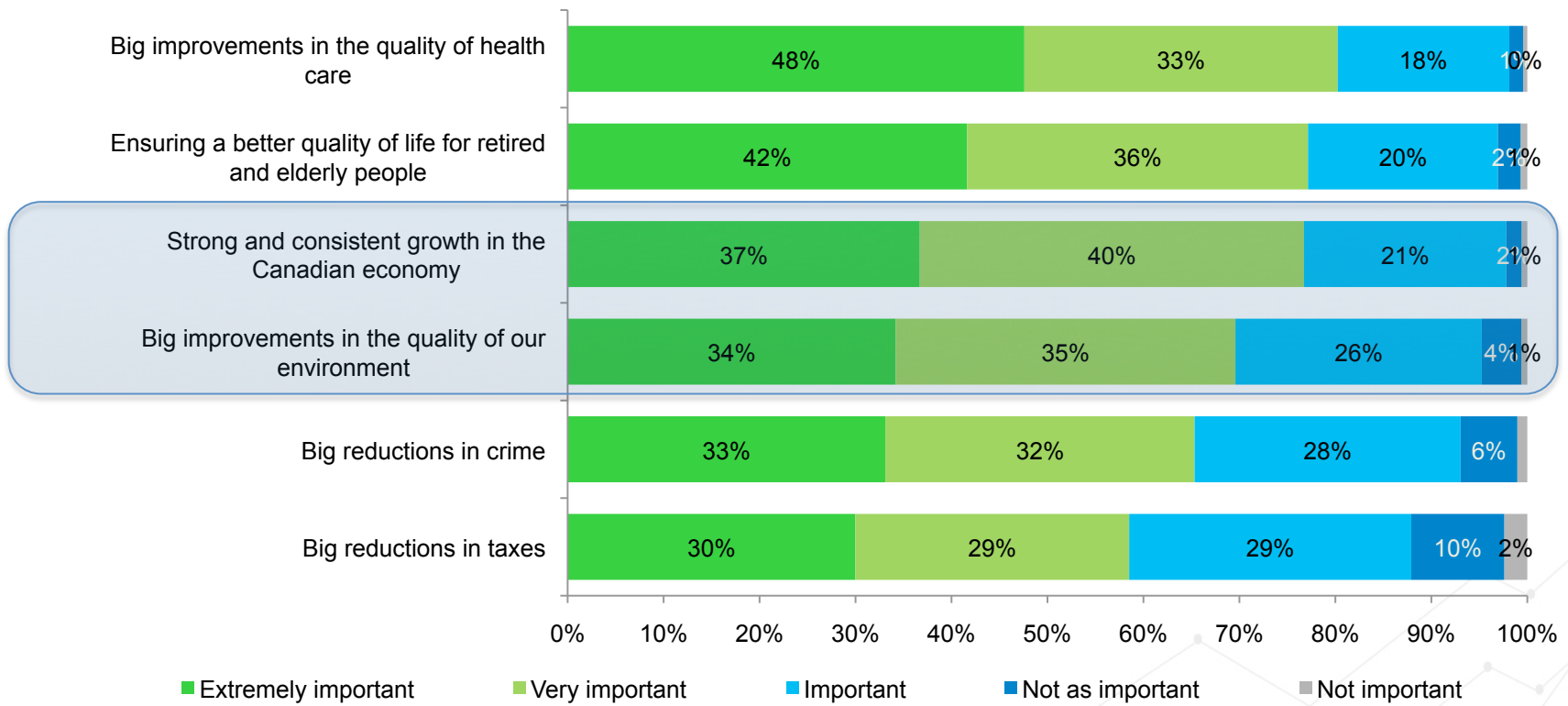


What the Study Reveals

- HUGE MAJORITIES BELIEVE IT IS ENTIRELY POSSIBLE TO ACHIEVE GREENER GROWTH
- LACK OF INSTINCT TO PLACE BLAME, WE ALL HAVE SHARE RESPONSIBILITY, BUSINESS CAN HELP A LOT
- BROAD ENTHUSIASM FOR AN ARRAY OF GOALS, LARGE MAJORITIES BELIEVE THEY ARE ACHIEVABLE
- PEOPLE BELIEVE THE BARRIERS ARE MORE ABOUT COLLECTIVE WILL THAN ECONOMICS

Canada - 15 Years from Now

Thinking about the kind of Canada you would like to see 15 years from now, how important are each of the following aspirations?



Economic Growth and Environmental Quality

Thinking about the kind of Canada you would like to see 15 years from now, how important are each of the following aspirations?

Percent of total sample

		Importance: Big improvements in the quality of our environment				
		Extremely important	Very important	Important	Not as important	Not important
Importance: Strong and consistent growth in the Canadian Economy	Extremely important	21%	10%	5%	1%	-
	Very important	8%	20%	10%	2%	-
	Important	5%	5%	10%	1%	-
	Not as important	1%	-	1%	-	-
	Not important	-	-	-	-	-

59% of Canadians believe that big improvements in the environment and strong and consistent growth in the economy are either extremely or very important for Canada to achieve in the next 15 years.

Economic Growth and Environmental Quality

Who are the Canadians (21%) who believe economic growth and environmental protection are extremely important aspirations for Canada in the next 15 years?

- More likely to be female. 23% of women vs. 19% of men
- More likely to be from Ontario (25%) and Atlantic Canada (27%) than from Alberta (15%) or BC (14%).
- More likely to support the NDP (26%) but a portion of all parties' supporters hold these views: LPC (21%), CPC (17%), GPC (22%).

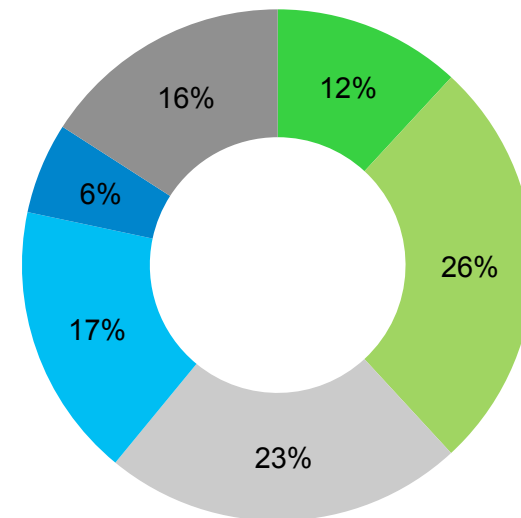
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n = 2,807

Top Priority: Canada 15 Years from Now

If you could only choose one of these aspirations to become a reality, which one would be your top priority?

- Though no single issue dominated, economy was the top priority for a plurality (26%) of respondents
- Twenty three percent chose big improvements in the quality of health care as their top priority
- Big improvements in environment and crime rates were the least likely to be chosen as top priorities (12% and 6%, respectively)



- Big improvements in the quality of our environment
- Strong and consistent growth in the Canadian economy
- Big improvements in the quality of health care
- Ensuring a better quality of life for retired and elderly people
- Big reductions in crime
- Big reductions in taxes

n = 2,807

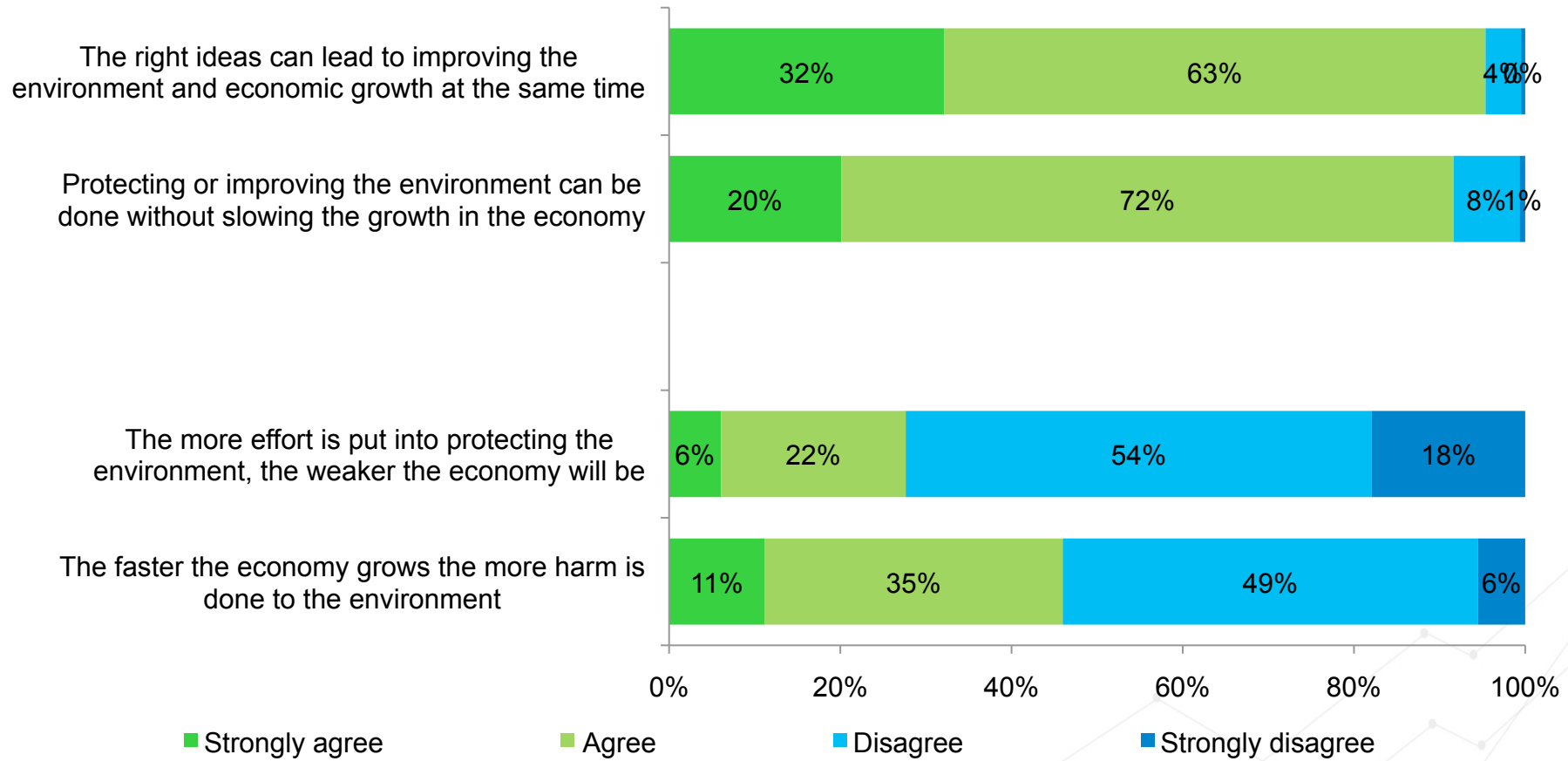
Environment & Economy

- Respondents were shown a series of statements about the environment and the economy and asked whether or not they agreed with each.
- Virtually all respondents agreed that with the right ideas, it is possible to improve the economy and the environment at the same time.
- However, a minority of respondents were polarized between believing that a greater focus on environmental protection will lead to economic decline (28% agree) and that there is a direct relationship between economic growth and environmental harm (46% agree).

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Environment & Economy



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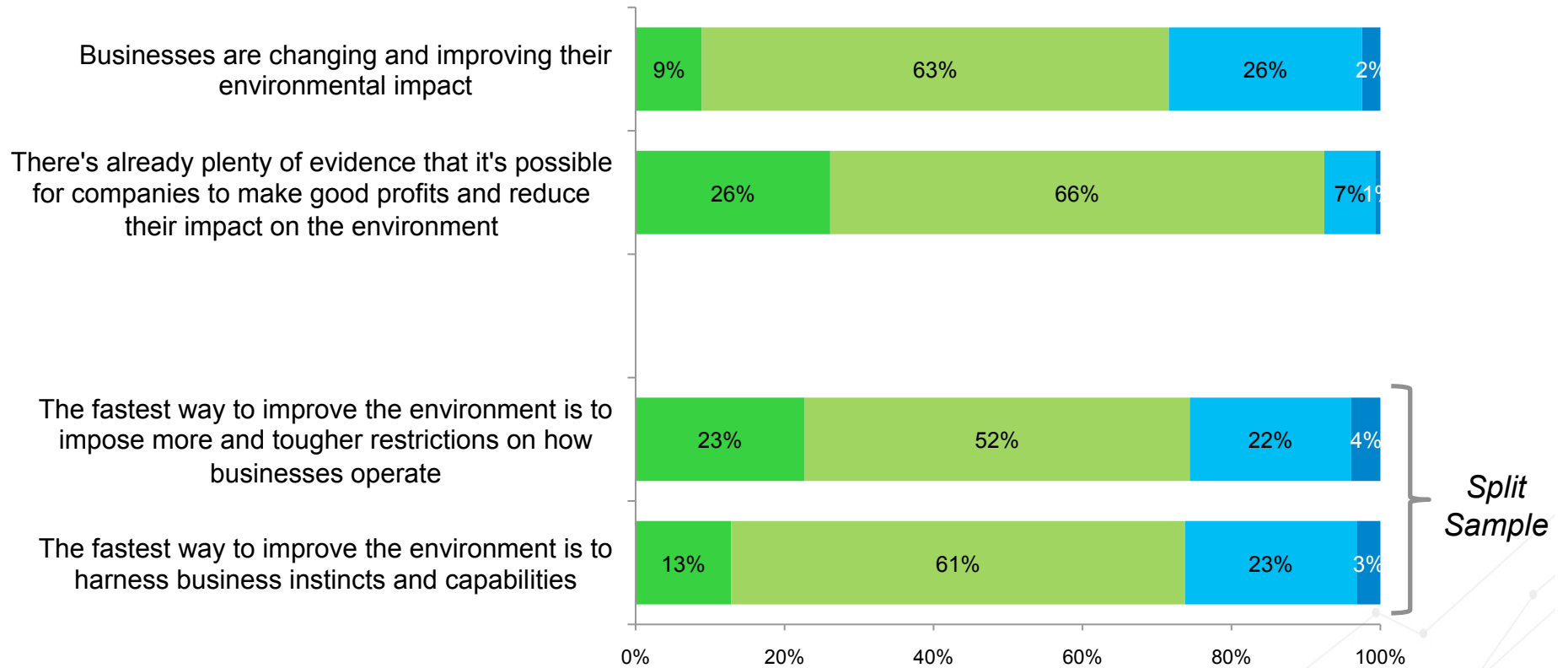
Environment & Business

- Canadians recognize that businesses are changing and improving their environmental impact and almost all agree that there's already plenty of evidence that it's possible for companies to make good profits and reduce their impact on the environment.
- The challenge is there appears to be contradictory views when it comes to how businesses can improve their environmental performance.
- Using a split sample design, a large majority of Canadians agree that the fastest way to improve the environment is to impose tougher restrictions on business. In contrast, another large majority also believes that the fastest way to improve the environment is to harness business instincts.

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Environment & Business



Split Sample

■ Strongly agree
 ■ Agree
 ■ Disagree
 ■ Strongly disagree



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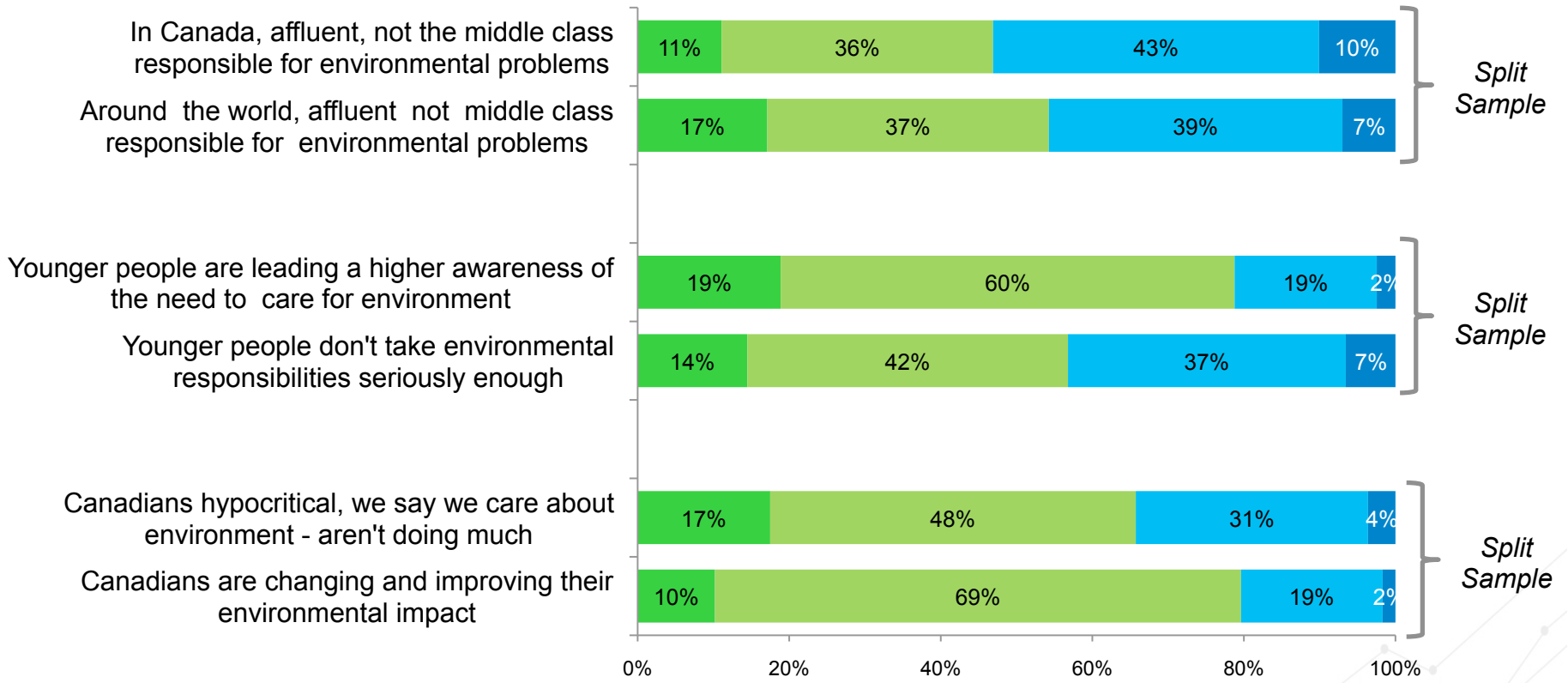
The Public

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The Public



■ Strongly agree
 ■ Agree
 ■ Disagree
 ■ Strongly disagree



n = 2,807

Environment and Economy Spectrum

Next, respondents were asked to use a spectrum to indicate where they think the emphasis is between the environment and the economy when it comes to the way in which things in the world have been going lately.

Placing the indicator in the middle (50) would indicate an equal emphasis on both the environment and the economy, while placing it at 0 or 100 would indicate a complete emphasis towards the environment or economy, respectively.

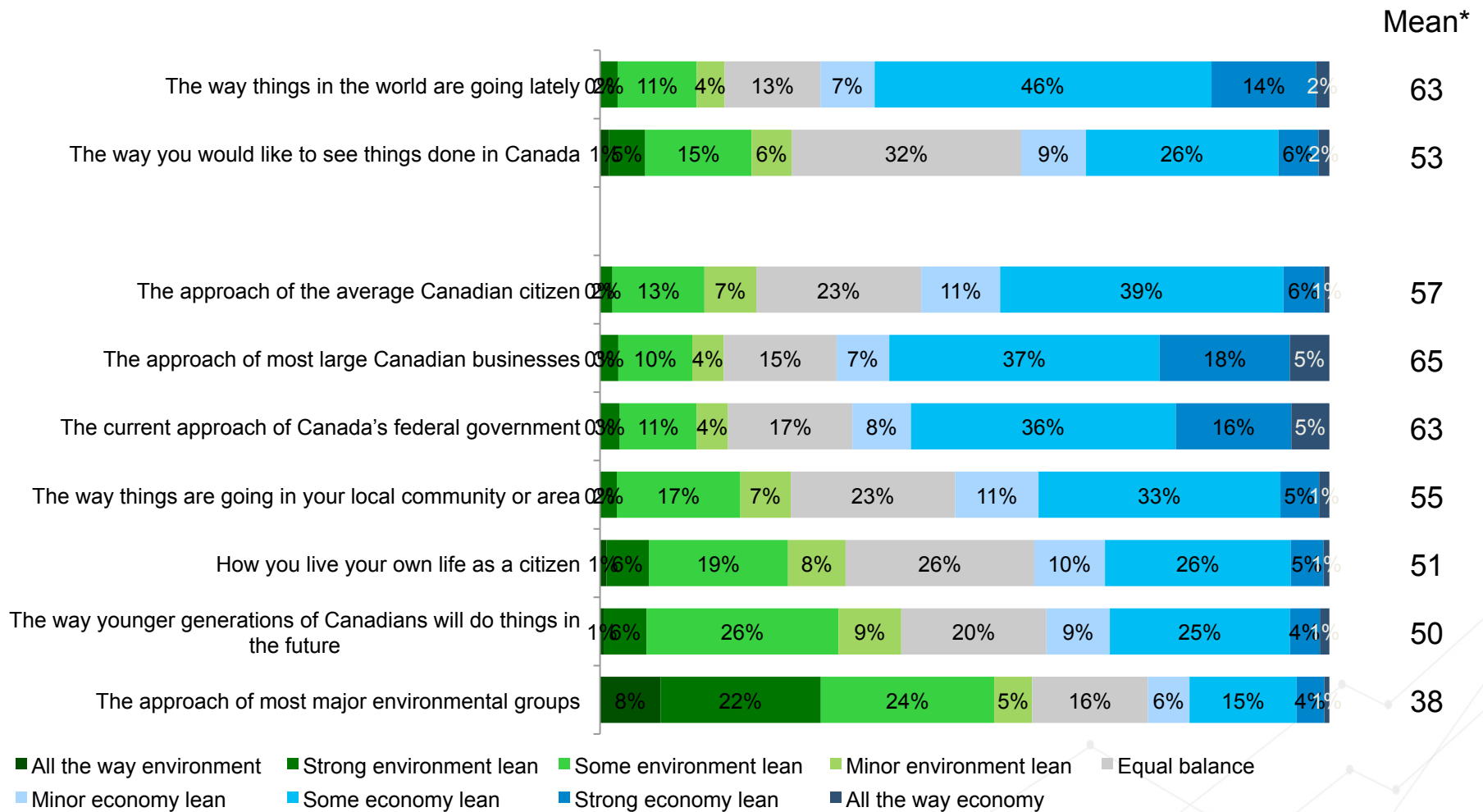
Results for a range of statements are presented on the next page.

Overall, respondents were more likely to think that things today leaned more towards the economy but most preferred a more balanced approach. Perceptions of Canadian businesses and the Canadian government aligned closely, with a majority of Canadians thinking their focus was on the economy.

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Environment and Economy Spectrum

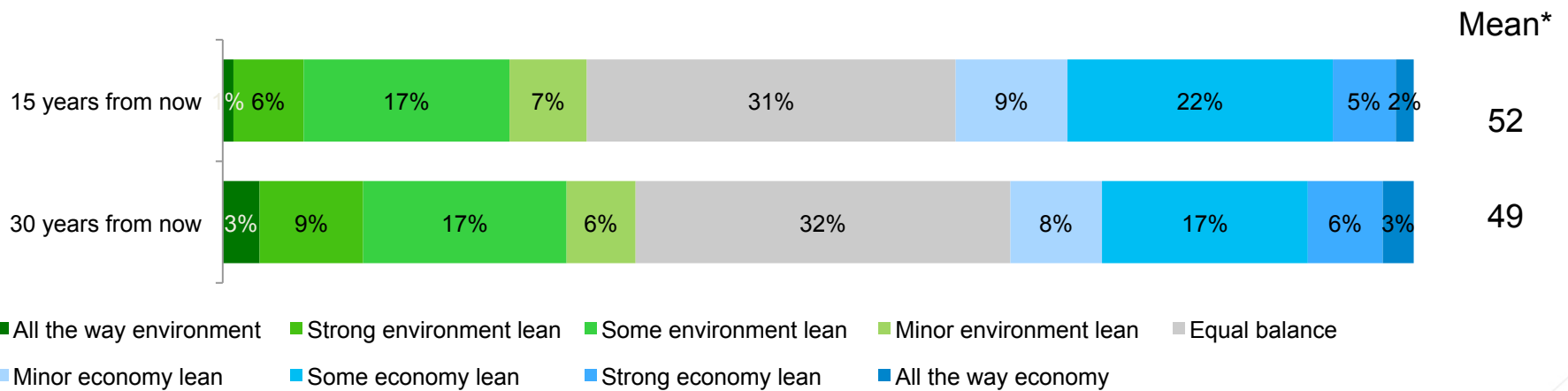


* Higher score indicates greater emphasis on "the economy"

n = 2,807

Environment and Economy Spectrum

Thinking about [15/30] years from now, where would you **like** to see that indicator be in terms of how things are done in Canada?



* Higher score indicates greater emphasis on "the economy"

n = 2,807

Appeal and Possibility of Different Goals

Respondents were shown a series of potential goals for the future in Canada and asked 'over the next 15 years, how much you would like to see each happen', followed by how possible they felt each outcome would be.

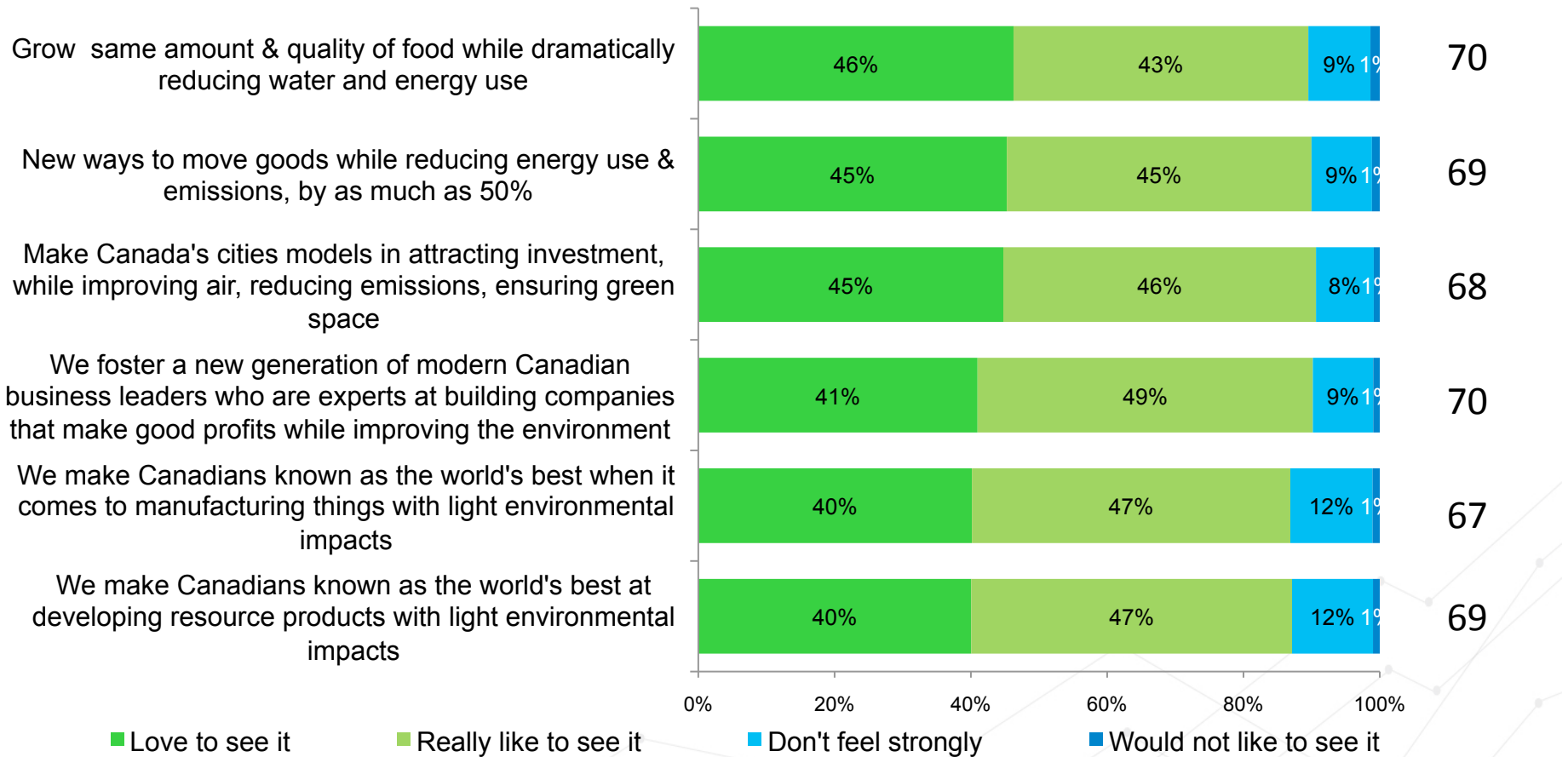
- Overall, respondents showed a consistently high level of optimism towards all the statements tested, with over 80% reporting they would 'really like' or 'love' to see the goals realized
- Additionally, a majority of respondents felt that it would be possible to achieve each of these goals within fifteen years
- The following charts examine the appeal of these goals, and whether or not respondents expect them to be achieved in the future



Appeal of Different Goals

In Canada, over the next 15 years, how much you would like to see each happen

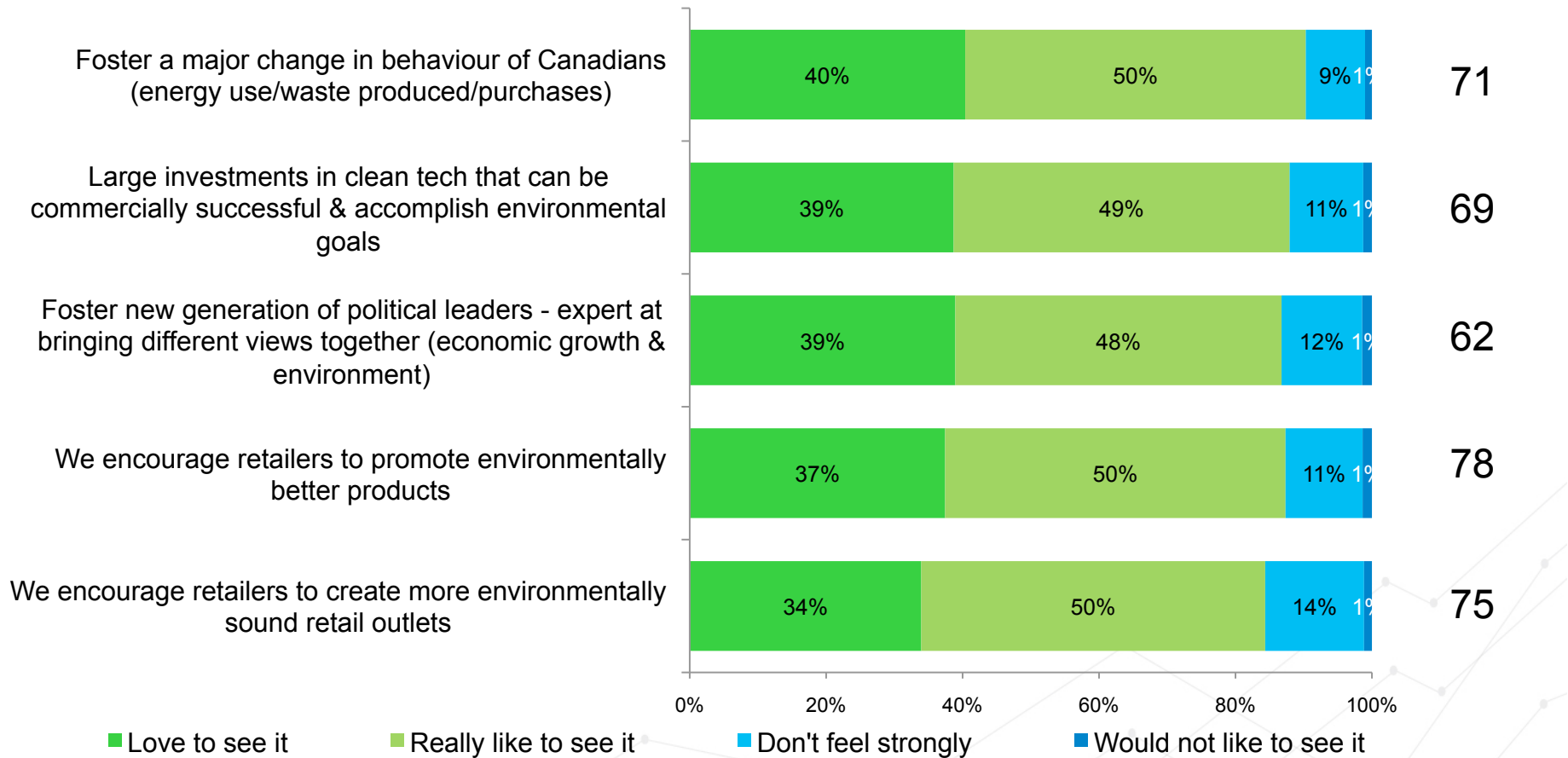
% who feel it is possible



Appeal of Different Goals

In Canada, over next 15 years, how much you would like to see each happen

% who feel it is possible



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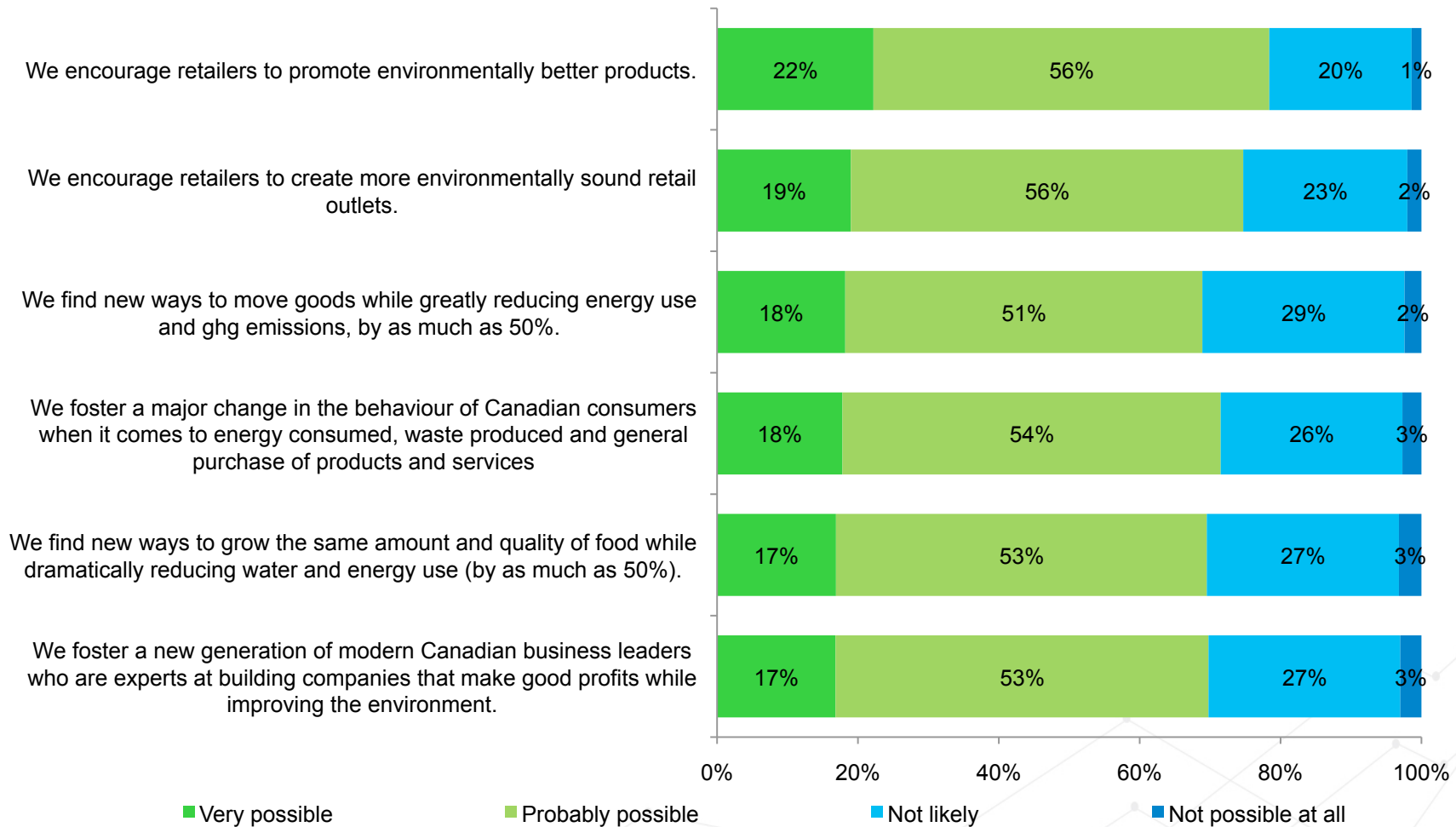
Possibility of Different Goals: 15 vs 30 Years

Respondents were split into random groups and asked how **possible** they a series of outcomes might be in the next 15 or 30 years.

- Approximately two thirds of respondents felt that each of these goals could be achievable within 15 years, with the most likely being encouraging retailers to promote environmentally sustainable products, and the least being fostering a new generation of political leaders
- Respondents were somewhat more likely to think the tested goals would be achievable after 30 years, with approximately three quarters of respondents citing possibility within 30 years.

Possibility of Different Goals in 15 Years

How **possible** you think that each of these will become reality in the next 15 years, for Canada.

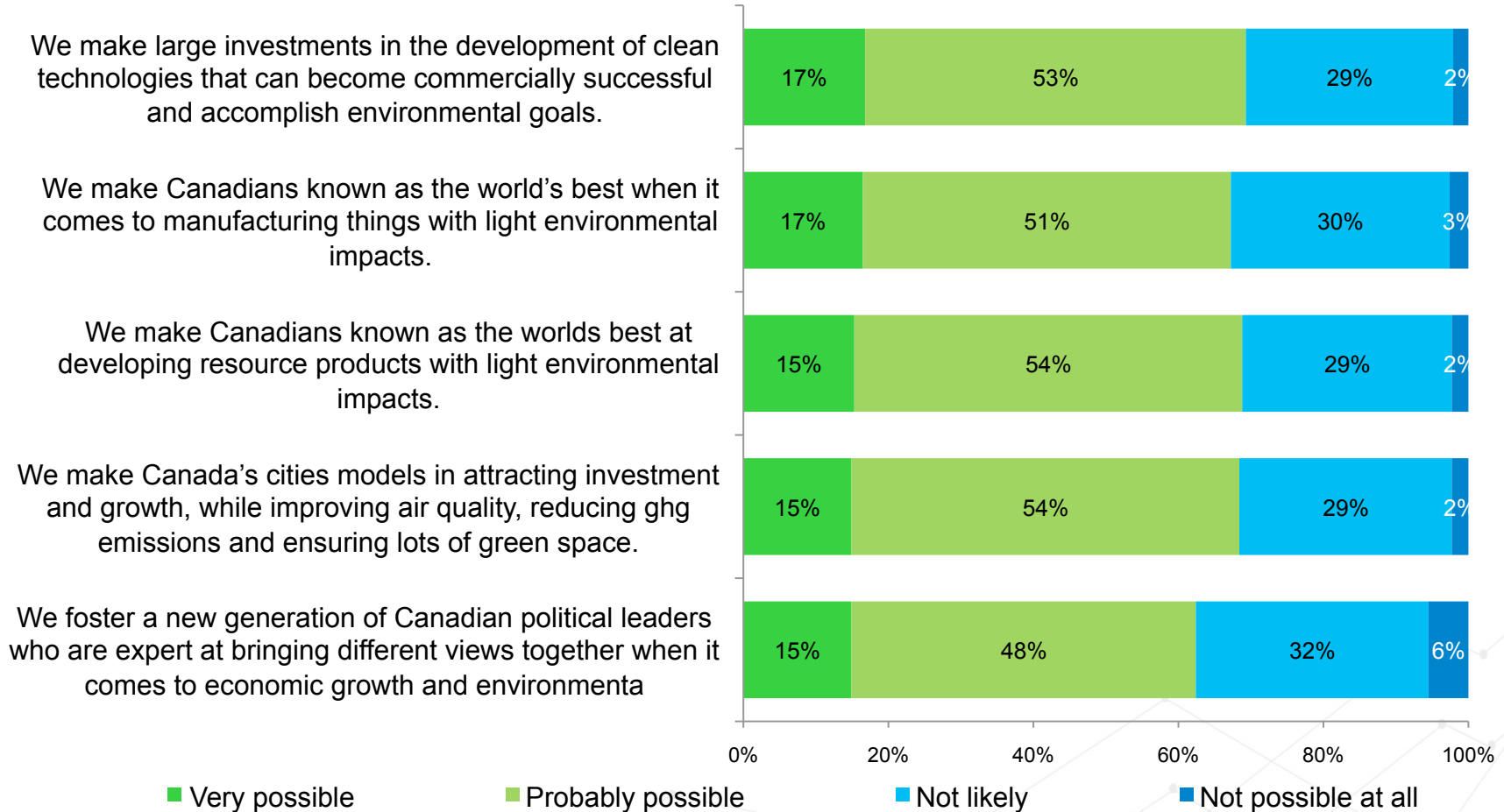


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n = 694

Possibility of Different Goals in 15 Years

How **possible** you think that each of these will become reality in the next 15 years, for Canada.

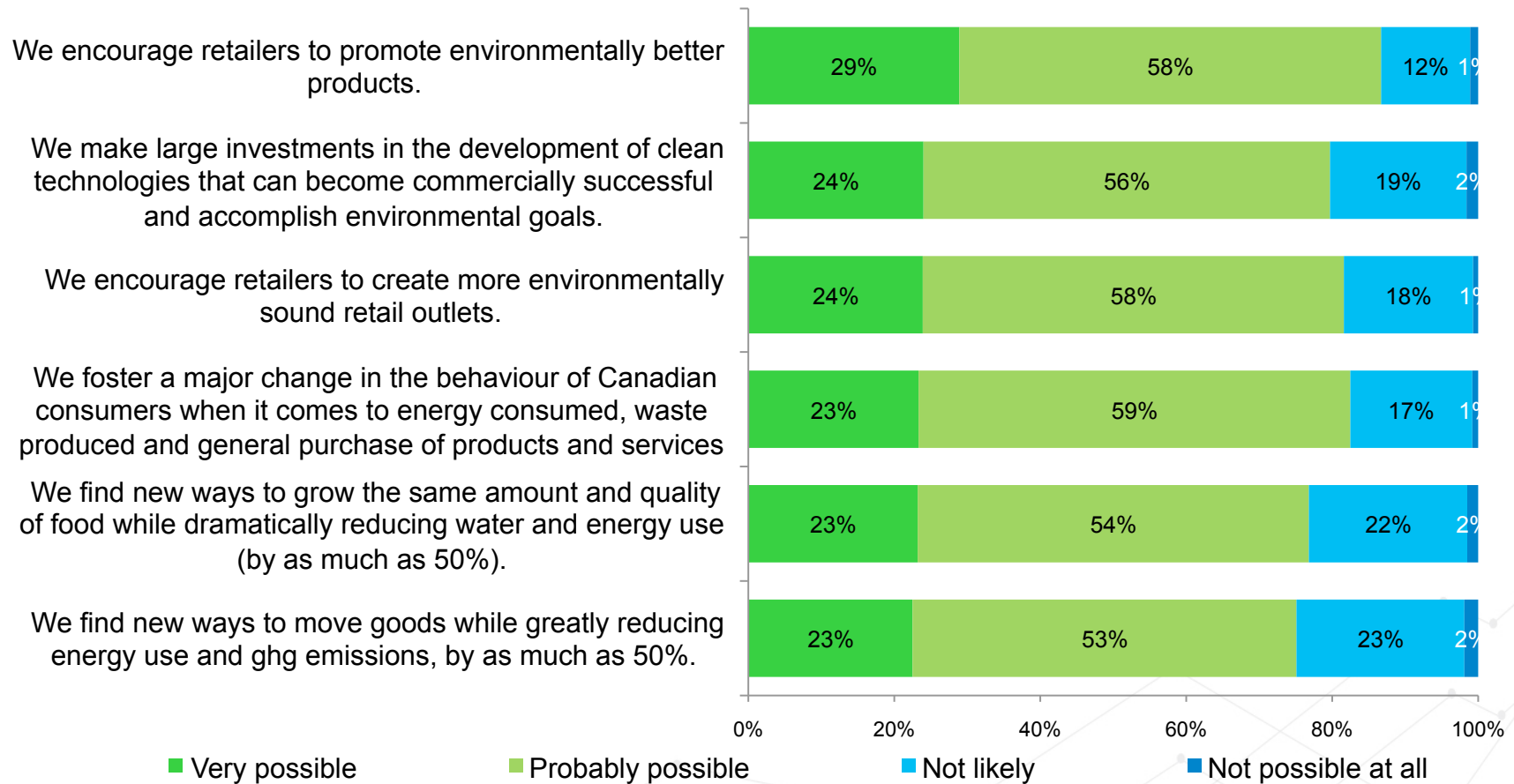


ABACUS DATA

n = 694

Possibility of Different Goals in 30 Years

How **possible** you think that each of these will become reality in the next 30 years, for Canada.

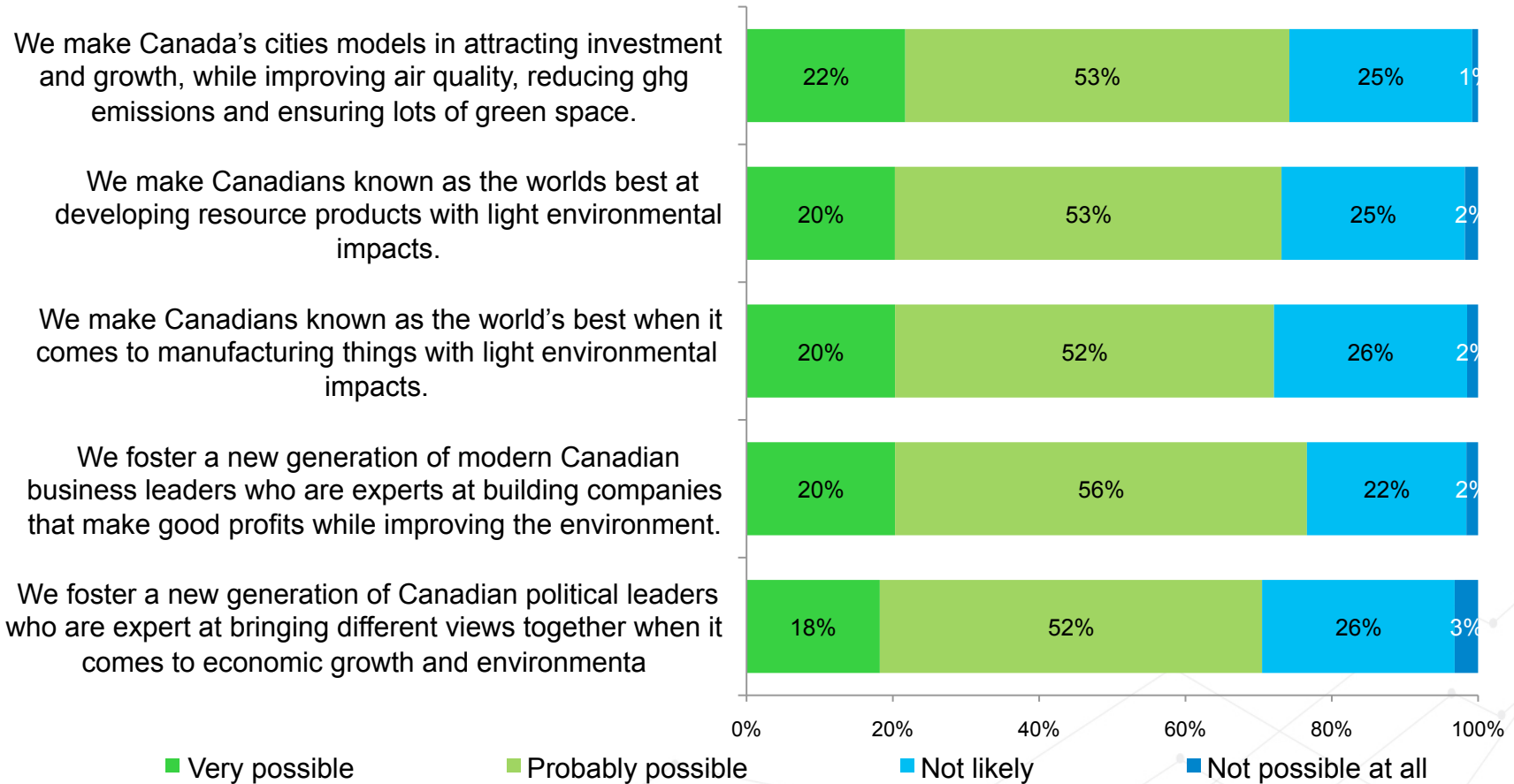


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n = 715

Possibility of Different Goals in 30 Years

How **possible** you think that each of these will become reality in the next 30 years, for Canada.



ABACUS DATA

n = 715

Appeal of Economy and Environment

In general, when you think about the aspiration for Canada when it comes to the idea of growing our economy and having a healthy environment, how appealing are each of the following to you? (Rank on a scale from 1 (not at all appealing) to 10 (very appealing))

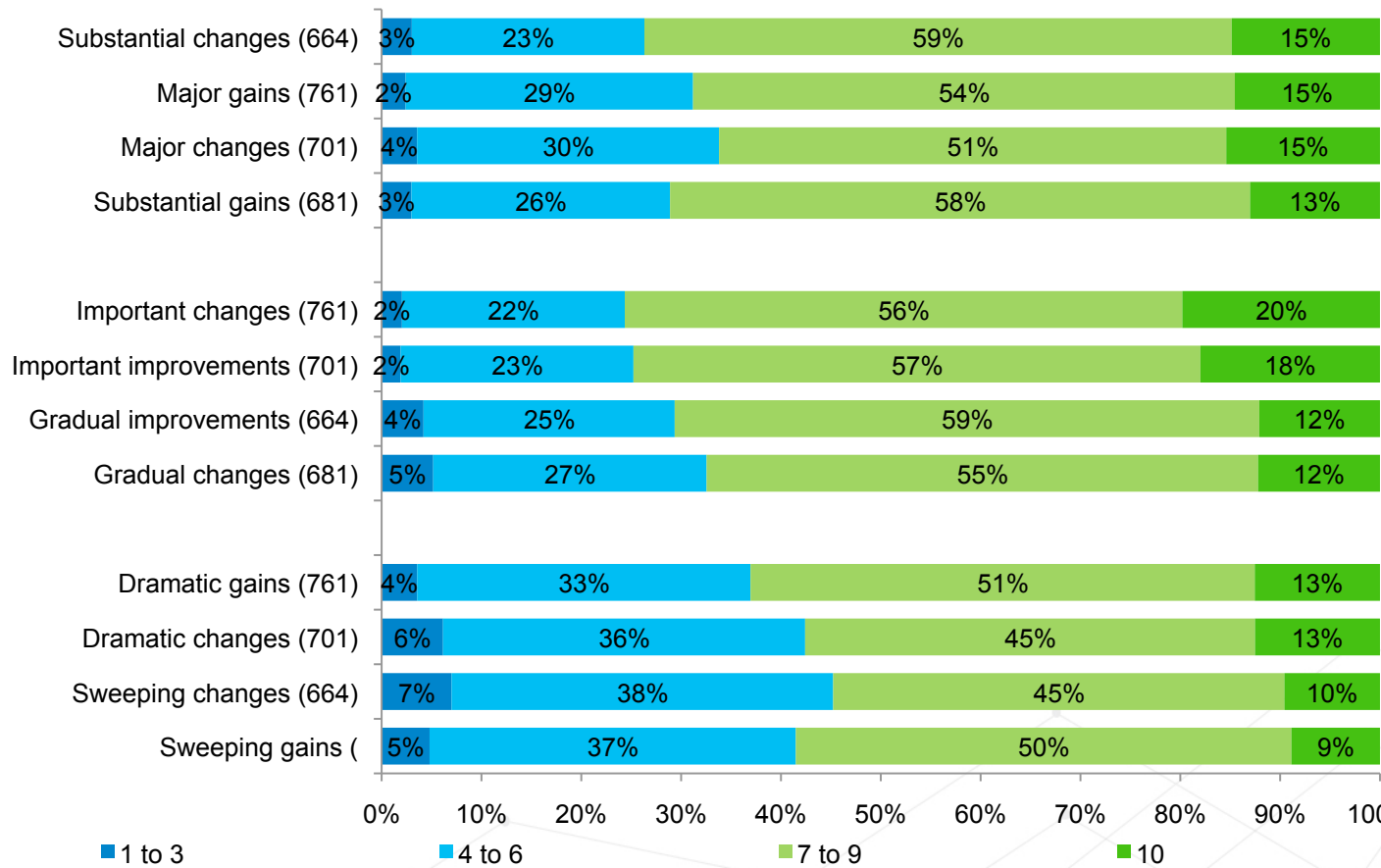


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n = 1,376

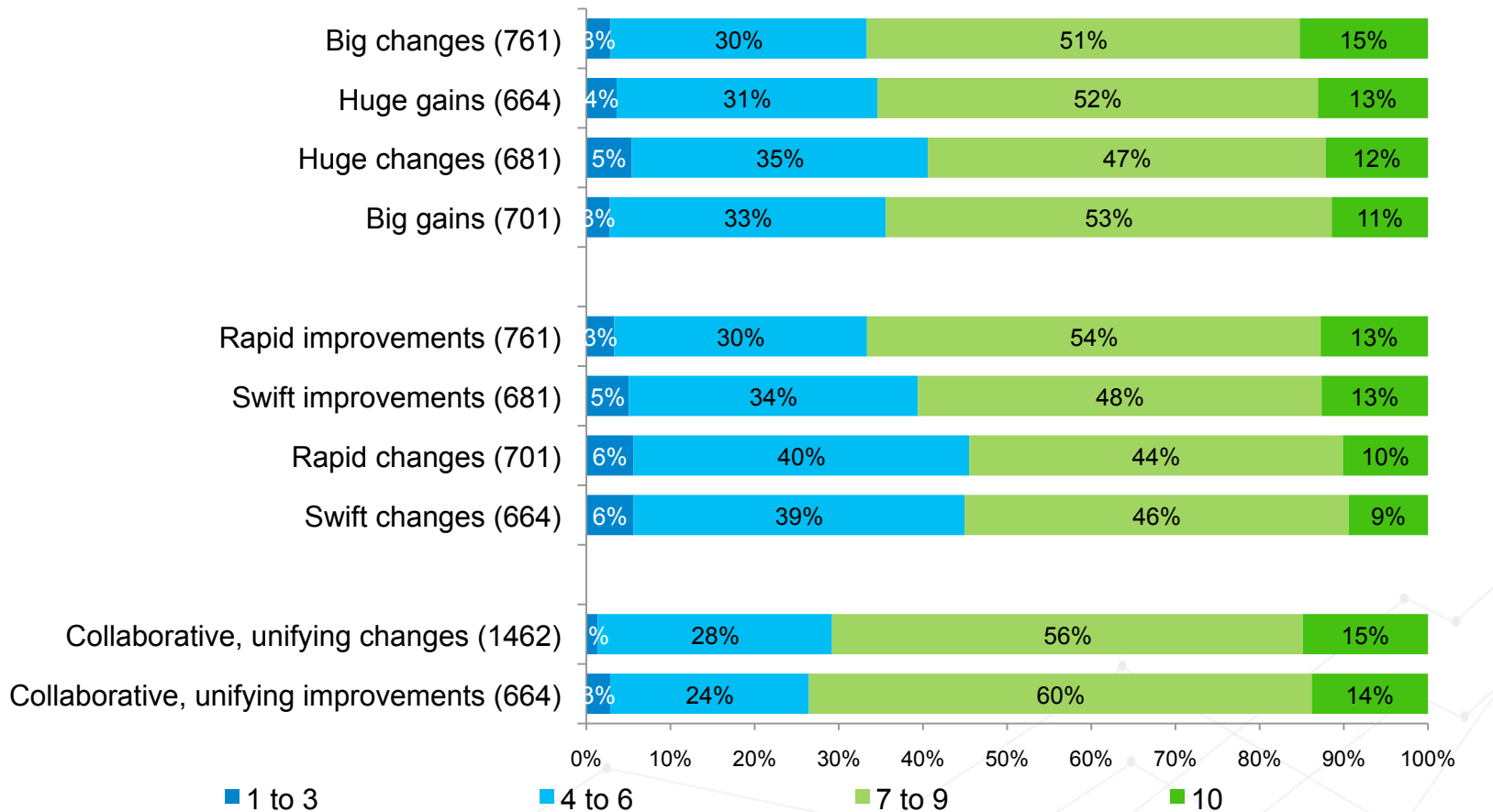
Kind of Change

How well does each of these terms describe the **kind of change** you would like Canada to make when it comes to the environment and the economy.



Kind of Change

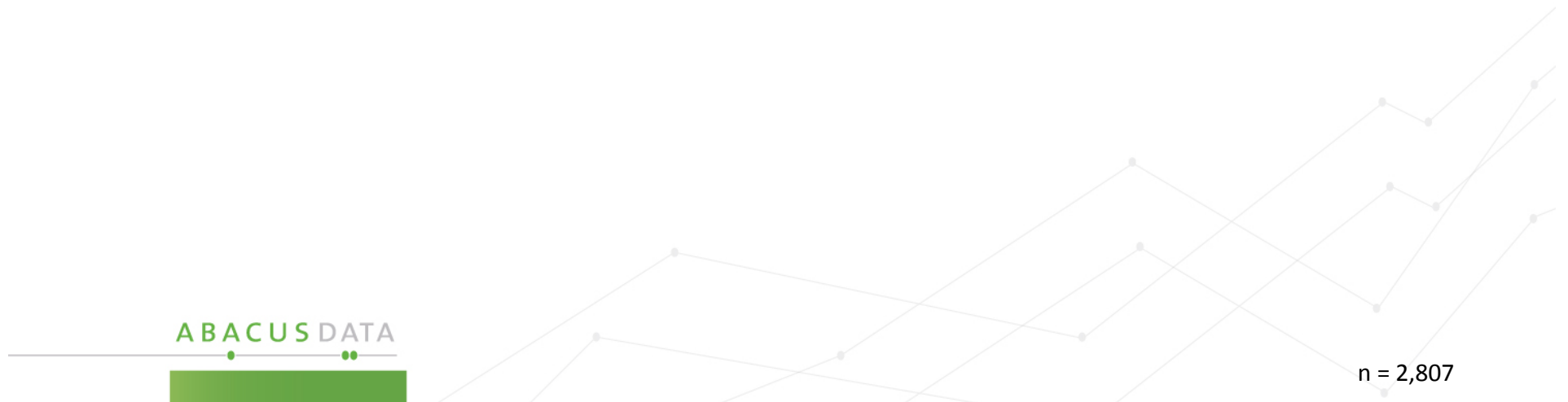
How well does each of these terms describe the **kind of change** you would like Canada to make when it comes to the environment and the economy.



Kind of Change

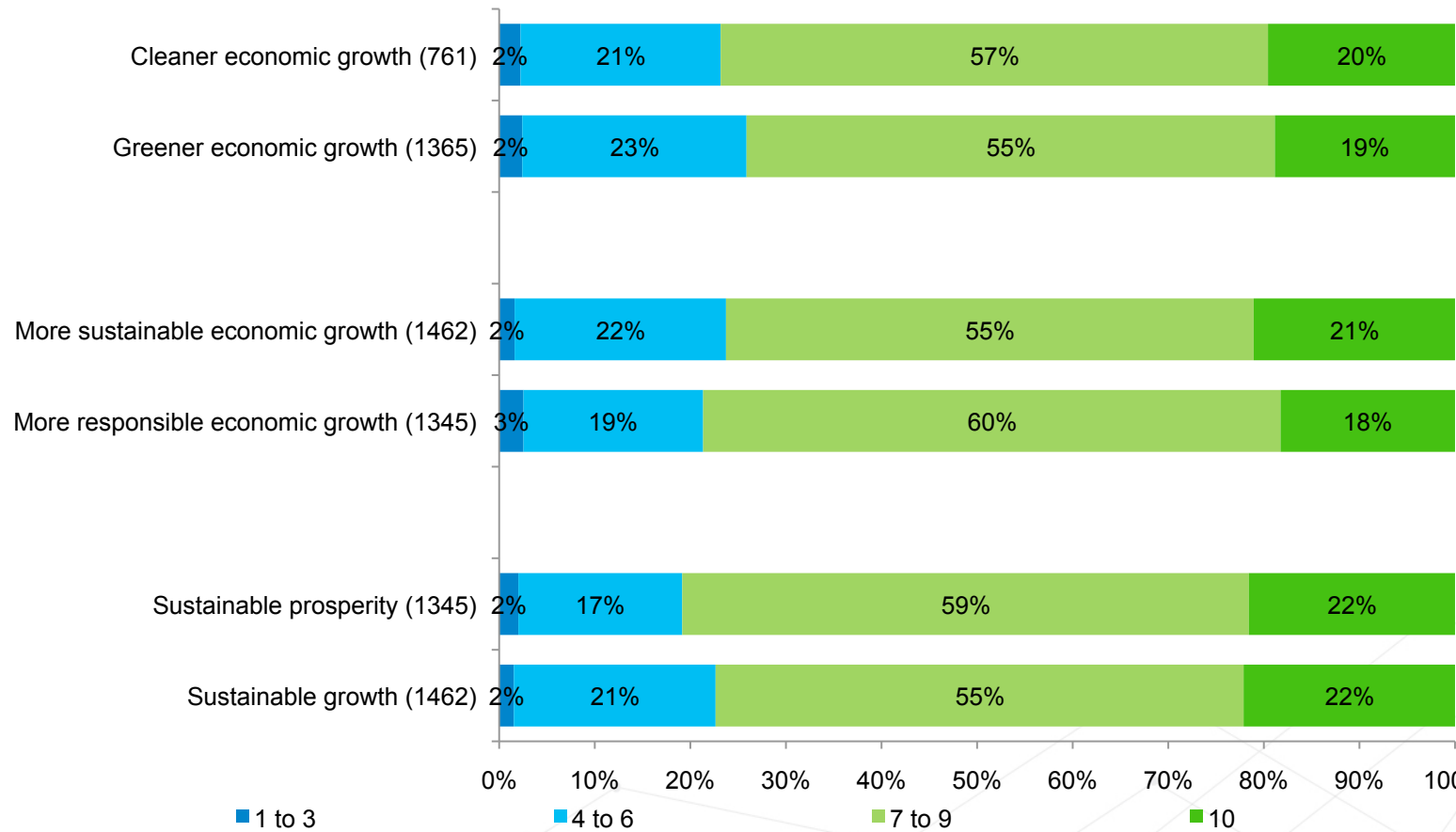
Slight differences in language were tested around the kinds of change respondents wanted to see happen.

- Respondents did not differentiate much between specific types of change
- Overall, a strong majority of respondents (over 70% in all cases) ranked each term a seven out of ten or higher
- Changing qualifiers within the terms (such as cleaner versus greener, sustainable versus responsible) had little to no effect on the overall impressions



Kind of Change

How well does each of these terms describe the **kind of change** you would like Canada to make when it comes to the environment and the economy.

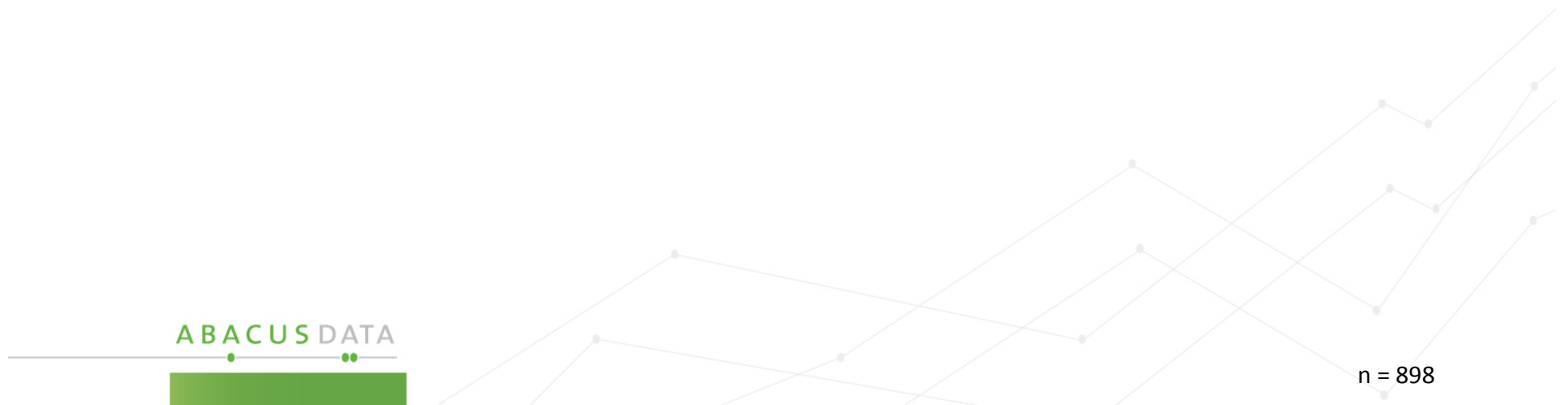


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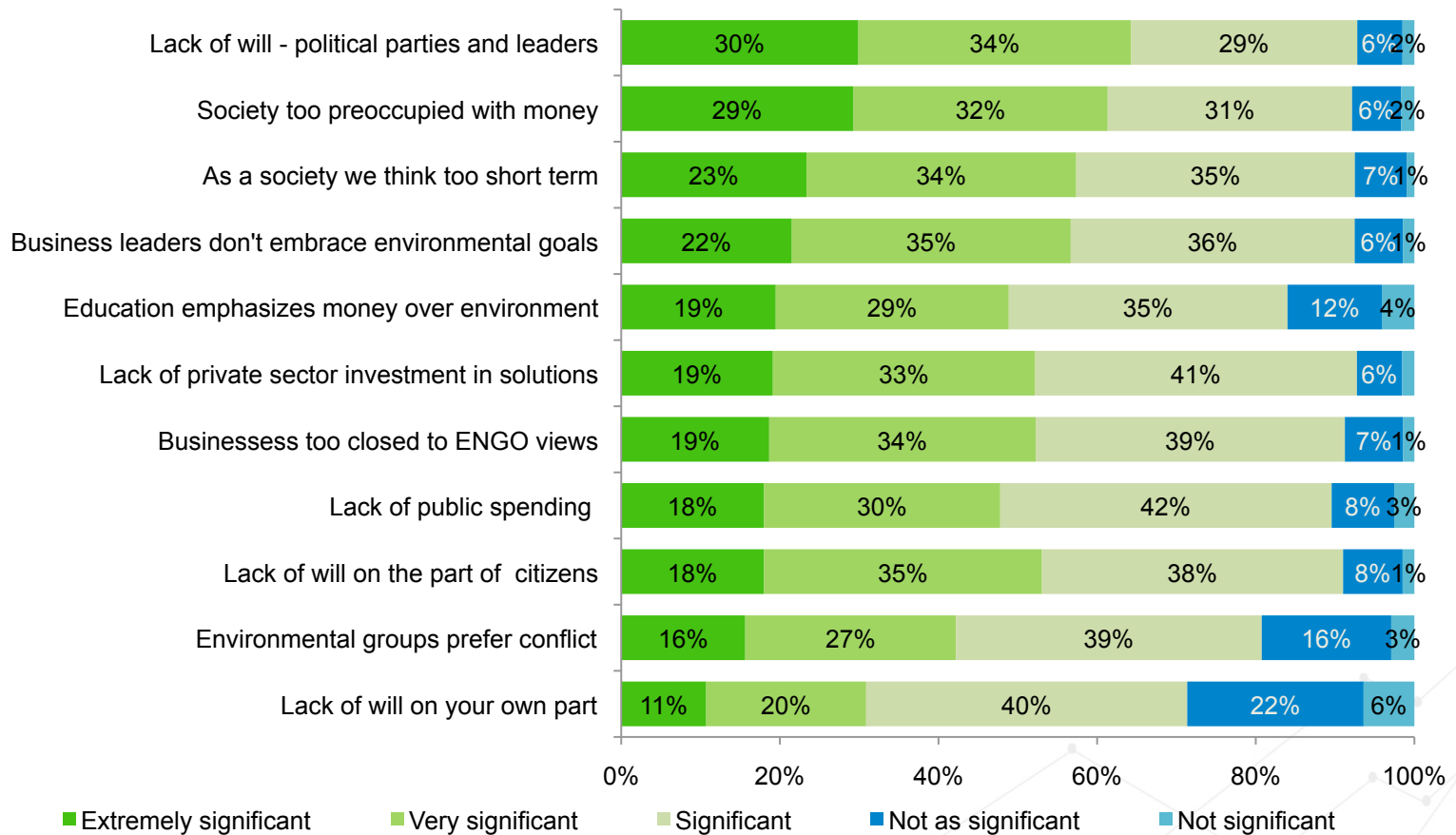
Perceived Barriers

- Overall, a strong majority of respondents identified all the tested barriers as a significant, very significant, or extremely significant barrier to Canada's economic and environmental future
- There was an observed difference between respondents' likelihood to identify a lack of will on the part of citizens as a barrier over their own lack of will



Perceived Barriers

To reach your aspirations for Canada's economic & environmental future, how significant are these barriers?



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n = 898

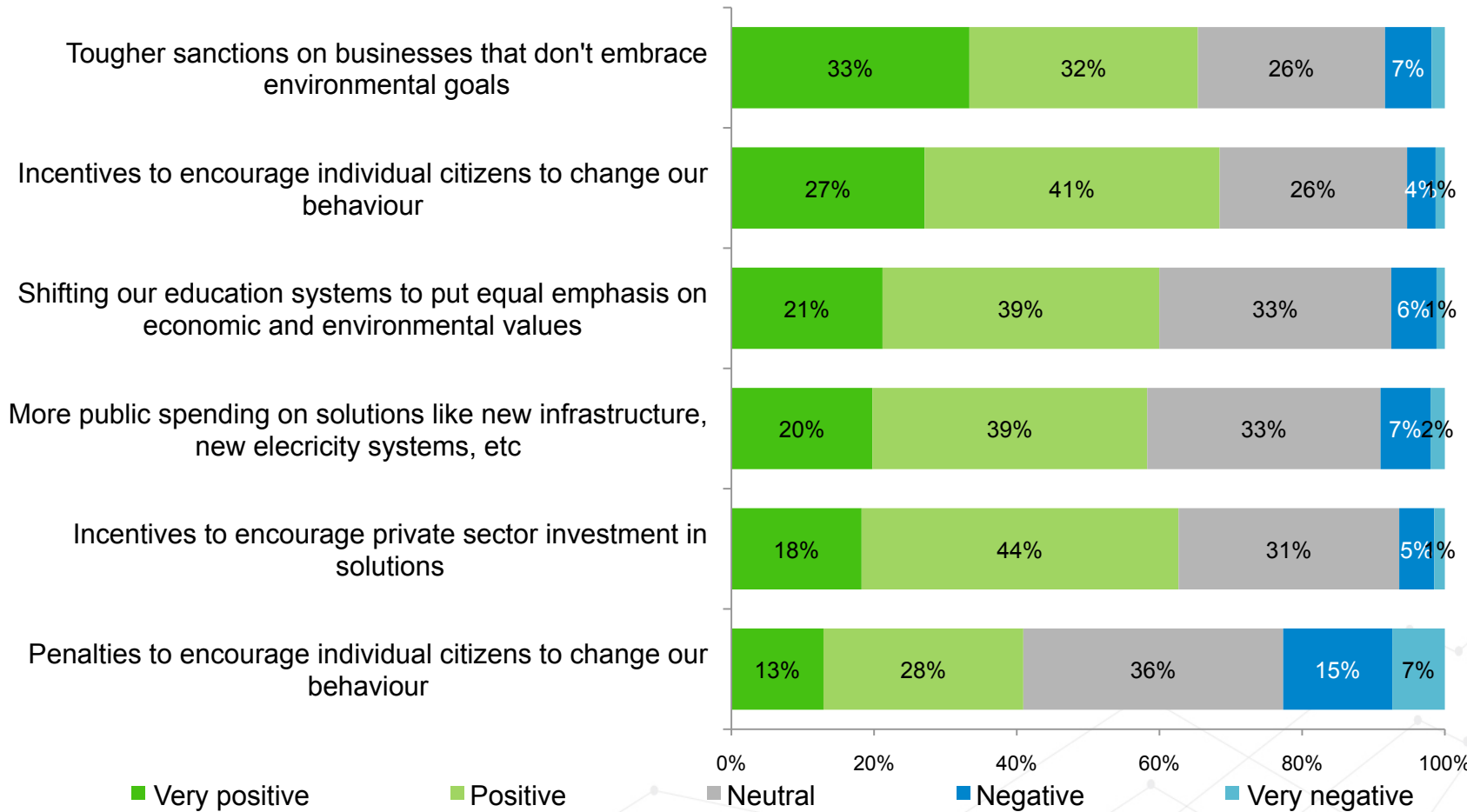
Views of Possible Solutions

- Respondents were shown a range of possible solutions, including options of tougher sanctions and incentives directed towards businesses and individuals
- Overall, respondents were more likely to have positive reactions towards incentive-driven solutions than those driven by sanctions
- Only one statement earned less than a majority of positive support: the idea of penalties against individual citizens to encourage behavioural change



Views of Possible Solutions

How do you feel about the following possible solutions?

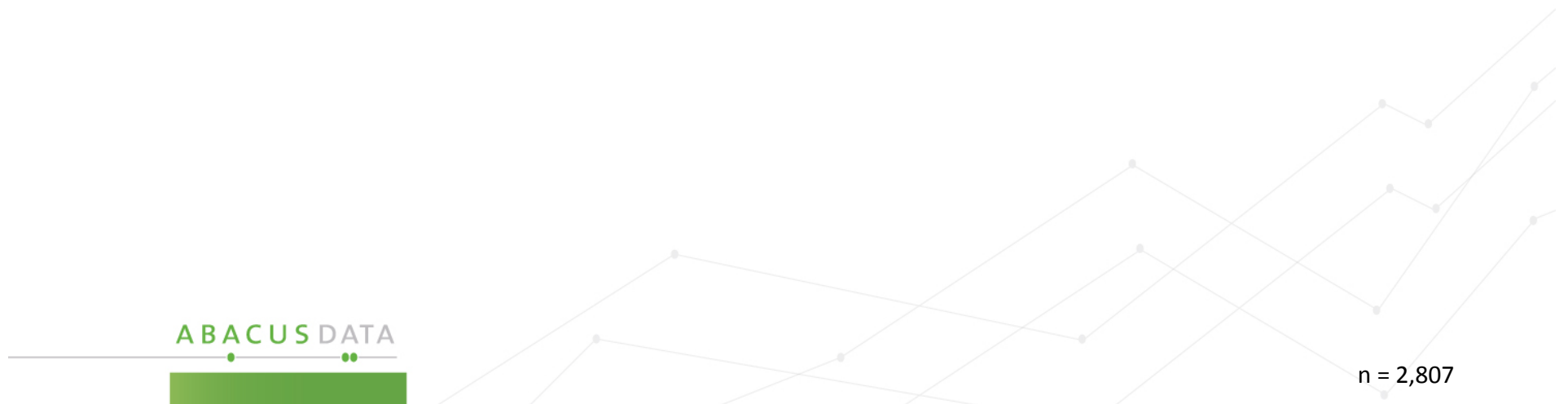


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n = 1,006

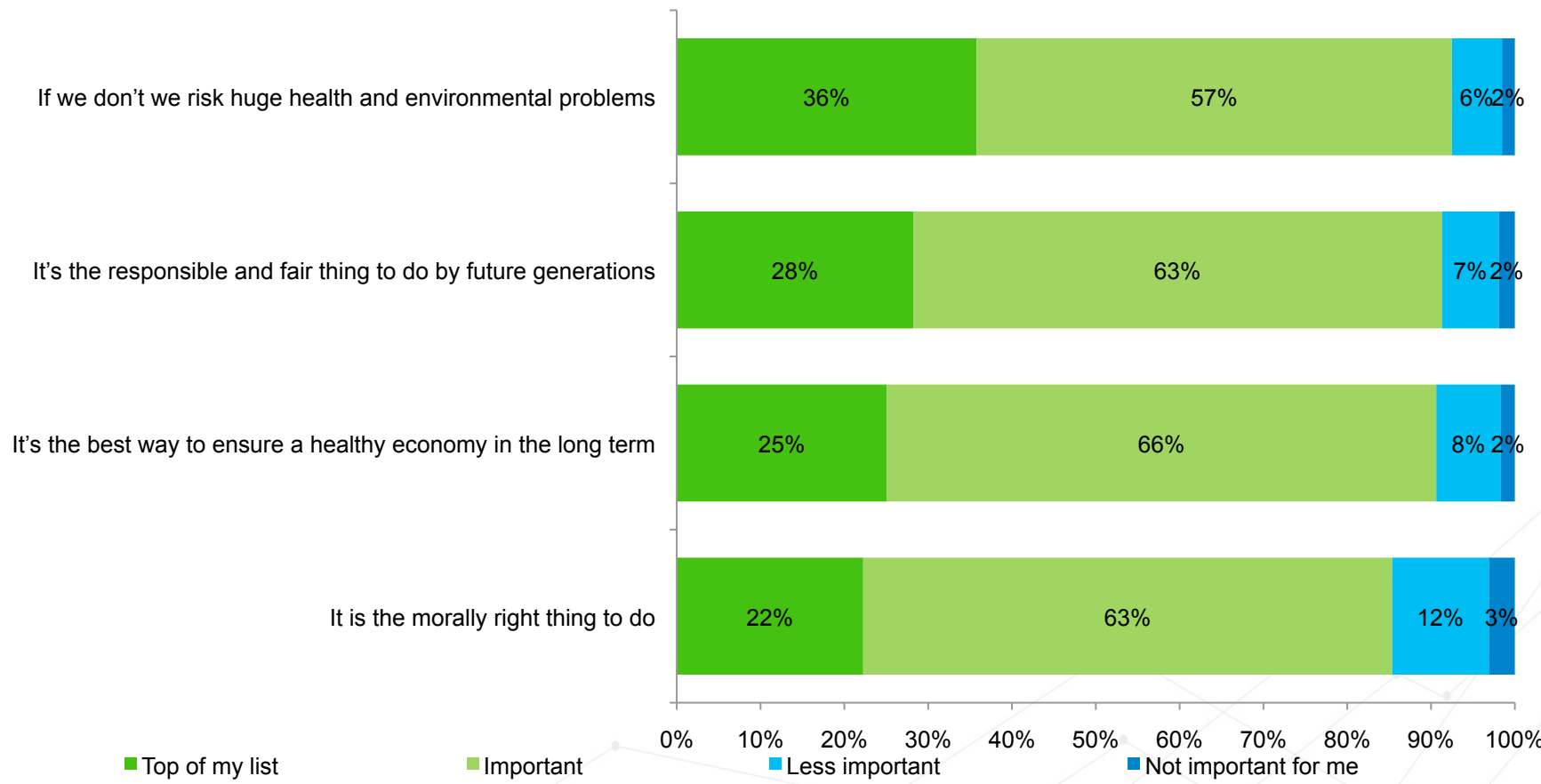
Reasons to Act and What Matters Most

- Overall, virtually all respondents found each statement was very or somewhat important
- When asked to choose the one that was most important to them personally, a plurality (37%) chose the risk of health and environmental problems if there's no action, with the moral argument being the least likely (14%)



Reasons to Act

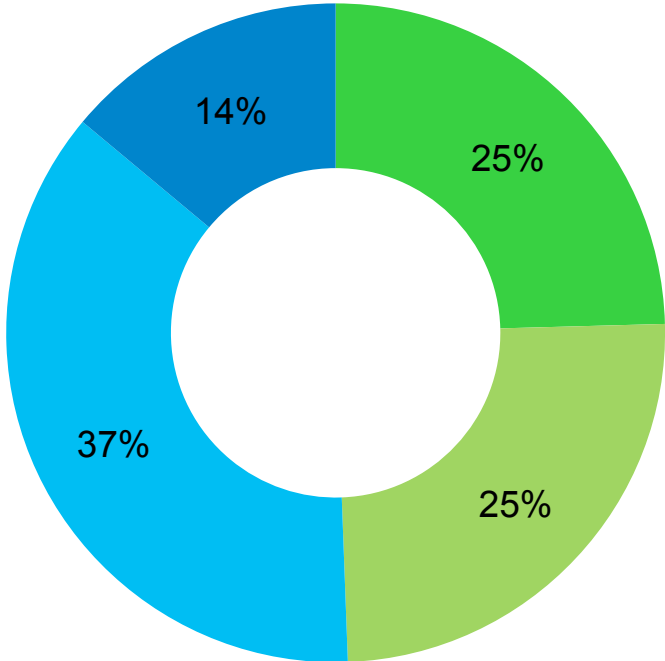
When you think about why you favour more emphasis on blending environmental and economic values, how important are the following.



n = 2,807

What Matters Most Personally

Which is the most important one for you personally?



- It's the responsible and fair thing to do by future generations
- It's the best way to ensure a healthy economy in the long term
- If we don't we risk huge health and environmental problems
- It is the morally right thing to do