EcoAnalytics

Environmental solutions:
Views about the path forward

QUANTITATIVE PHASE DEBRIEF
November 30, 2021

ENVIRONICS
RESEARCH

OBJECTIVES | WHY THIS PROJECT NOW?

Situation | Rough consensus (public, political, industry) that serious action is required to address climate change & biodiversity crises.

Opportunity | Capitalize on this moment to institute policies that achieve the dual goals of net zero & nature in balance, from among the variety of paths available.

Goal | Which mix of options garners the most support and what levers create support or detract from their appeal? Inform both strategy and communications.

METHODOLOGY | DETAILS OF THE SURVEY

Type: Quantitative research phase, 15-minute online survey from November 9 to 19, 2021.

Sample: n=2,293 adult Canadians, drawn from an online panel to be representative of the population by age, gender and income. 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%)	306	312
AB (11%)	255	257
SK (3%)	123	69
MB (4%)	125	80
ON (38%)	512	881
QC (24%)	454	539
NB (2%)	205	50
NS (3%)	205	62
PEI/NFLD (2%)	108	44

KEY TAKEAWAYS

1. There is a hierarchy of preference in terms of the policies that are most appealing to Canadians. BUT this hierarchy is not homogenous – it is driven by **values**, rather than demographics or political stripe.

2. This presents the opportunity to **build bridges** across different constituencies by focusing on what matters to them. There are several opportunities where reaction is more homogenous and less polarizing (NbS, just transition, how to pay for the NZ transition).

3. Lack of familiarity with climate solutions, and **uncertainty that they will make a difference**, continues to hamper support for these policies.

THE PUBLIC OPINION CONTEXT

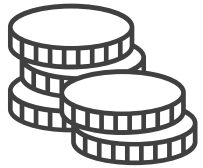
MOST IMPORTANT PROBLEM | CANADIANS' PERSPECTIVES

Climate change is considered one of the top problems facing Canadians today, behind COVID-19 and the cost of living.

Q5. In your opinion, what is the most important problem facing Canadians today? (N=2,293) MENTIONS > 4%

21%

Covid-19/the Pandemic



18%

Cost of Living/ Minimum Wage

12%

Climate change/ Global warming

11%

Housing cost/availability

9%

The economy

6%

Health care

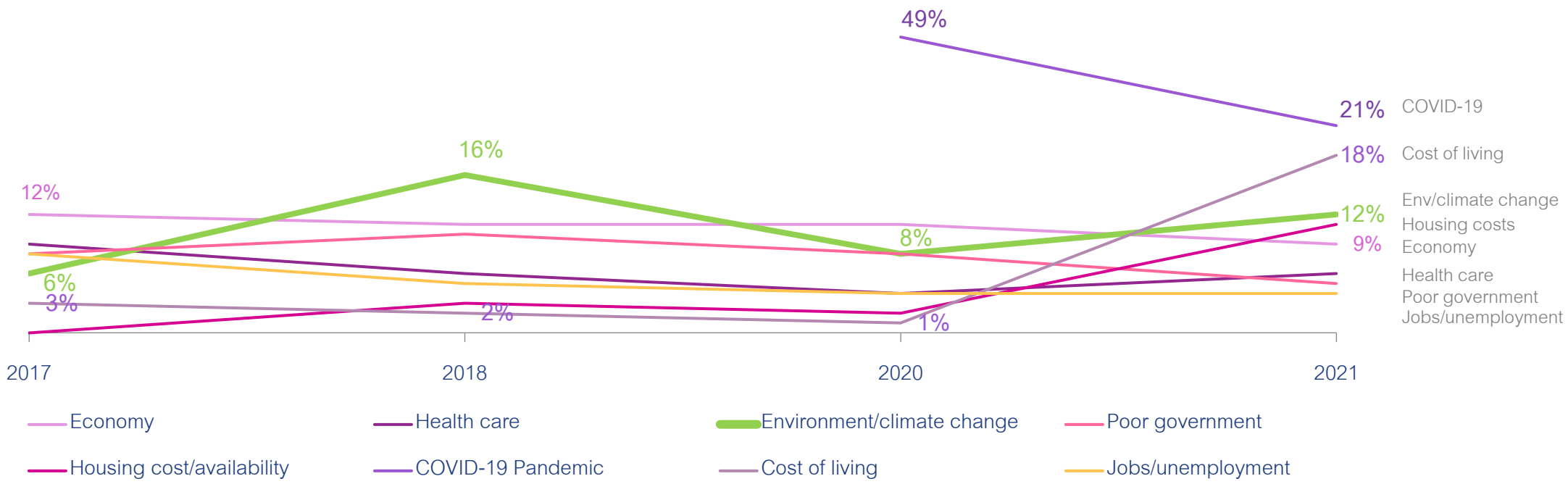
5%

Government representation/poor politicians

MOST IMPORTANT PROBLEM | TRACKING

As public focus on the pandemic starts to abate, concerns about cost of living have increased substantially – surpassing concerns about the economy generally. Attention to the environment/climate change has also inched up slightly since 2020, but remains shy of 2018 when it was considered the most important issue.

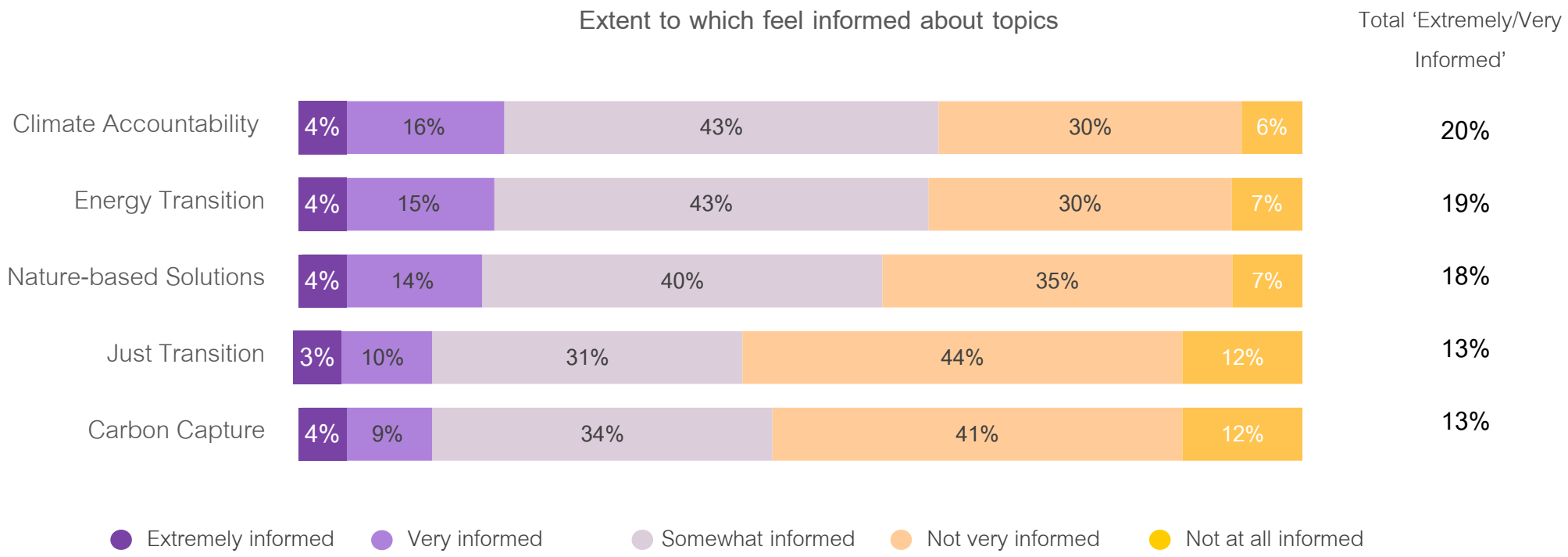
Q5. In your opinion, what is the most important problem facing Canadians today? (N=2,293) – TOP MENTIONS



FEELING INFORMED | BY CLIMATE SOLUTION

There are relatively few Canadians who feel well-informed about any of the climate solutions under discussion in Canada today.

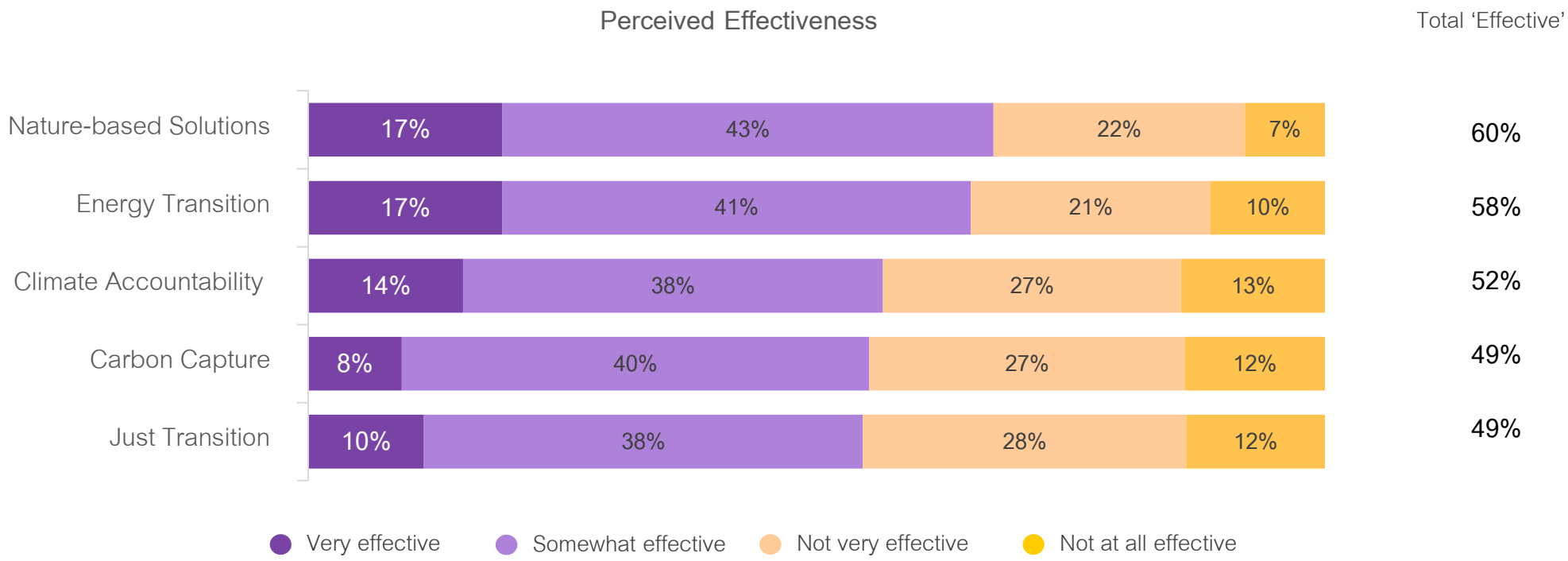
Q10-14. How well-informed do you feel about each of the following topics? (N=2,293)



PERCEIVED EFFECTIVENESS | BY CLIMATE SOLUTION

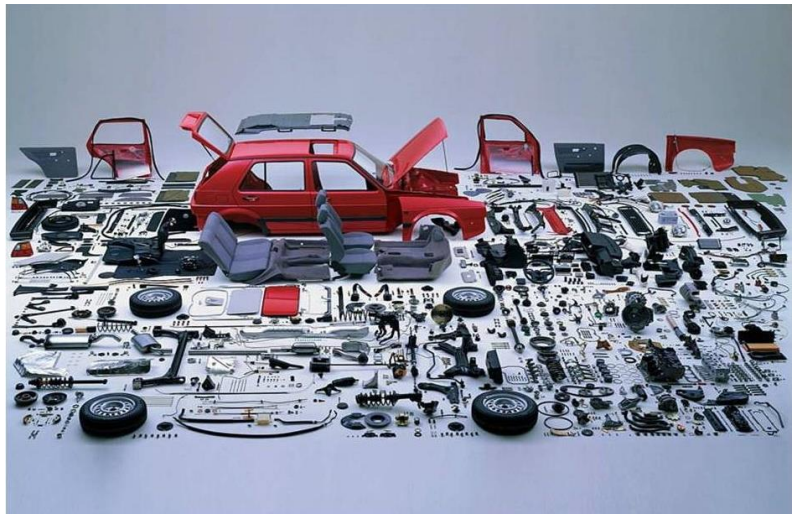
Canadians are optimistic that NbS and an energy transition will address climate change and biodiversity loss, but have mixed opinions about the potential effectiveness of accountability mechanisms, carbon capture and a just transition. In all cases, opinions reflect more uncertainty than certainty.

Q15-20. From what you know or have heard, how effective do you think each of these initiatives will be at helping Canada address climate change and biodiversity loss? (N=2,293)

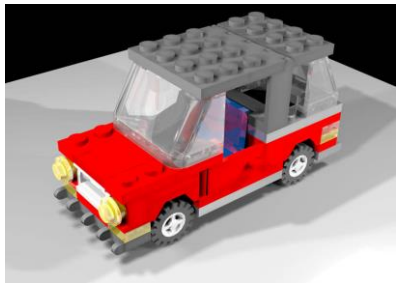


CONJOINT ANALYSIS

WHY DID WE DO A CONJOINT ANALYSIS?



OR



CONJOINT ANALYSIS | INPUTS

Policy	Levels
Timing for phasing out Canada's oil & gas production	By 2030
	By 2040
	By 2050
	By 2060
	Never
Timing for all new car & truck sales in Canada to be fully electric vehicles	By 2030
	By 2040
	By 2050
	By 2060
	Never

Policy	Levels
Initiatives to remove carbon emissions produced by humans from the atmosphere	Through technology (pumping it deep into earth's core or into concrete)
	Through nature-based solutions (natural carbon sinks such as forests and oceans)
	None
Proportion of Canada's land protected and restored to address biodiversity loss and climate change (current level is 12.5%)	12.5% (no change)
	20%
	35%
	50%

CONJOINT ANALYSIS | INPUTS (CONTINUED)

Policy	Levels
Government targets for reducing greenhouse gas emissions	No targets
	Voluntary targets set by each province/territory
	Voluntary targets set by the federal government
	Legally-binding targets set by each province/territory
	Legally-binding targets set by the federal government
Policy about jobs in fossil fuel industry (ensuring a just transition)	No jobs policy
	Help fossil fuel workers find jobs in the clean energy sector (but not offer skills retraining)
	Provide skills retraining for fossil fuel workers (but no help finding clean energy jobs)
	Help fossil fuel workers find clean energy jobs and provide skills retraining

CONJOINT ANALYSIS | INPUTS (CONTINUED)

Policy	Levels
Helping consumers offset costs through government subsidies (i.e., financial aid or support) such as energy efficiency rebates	None
	Targeted subsidies for low-income households
	Universal subsidies for all Canadians
How to finance the changes needed to achieve net zero	Phase out all subsidies to fossil fuel companies and to clean energy companies
	Phase out subsidies to fossil fuel companies, while keeping subsidies to clean energy companies unchanged
	Increase subsidies to clean energy companies, while keeping subsidies to fossil fuel companies unchanged
	Phase out subsidies to fossil fuel companies and redirect them to clean energy companies
	Keep subsidies for both fossil fuel companies and clean energy companies unchanged at current levels

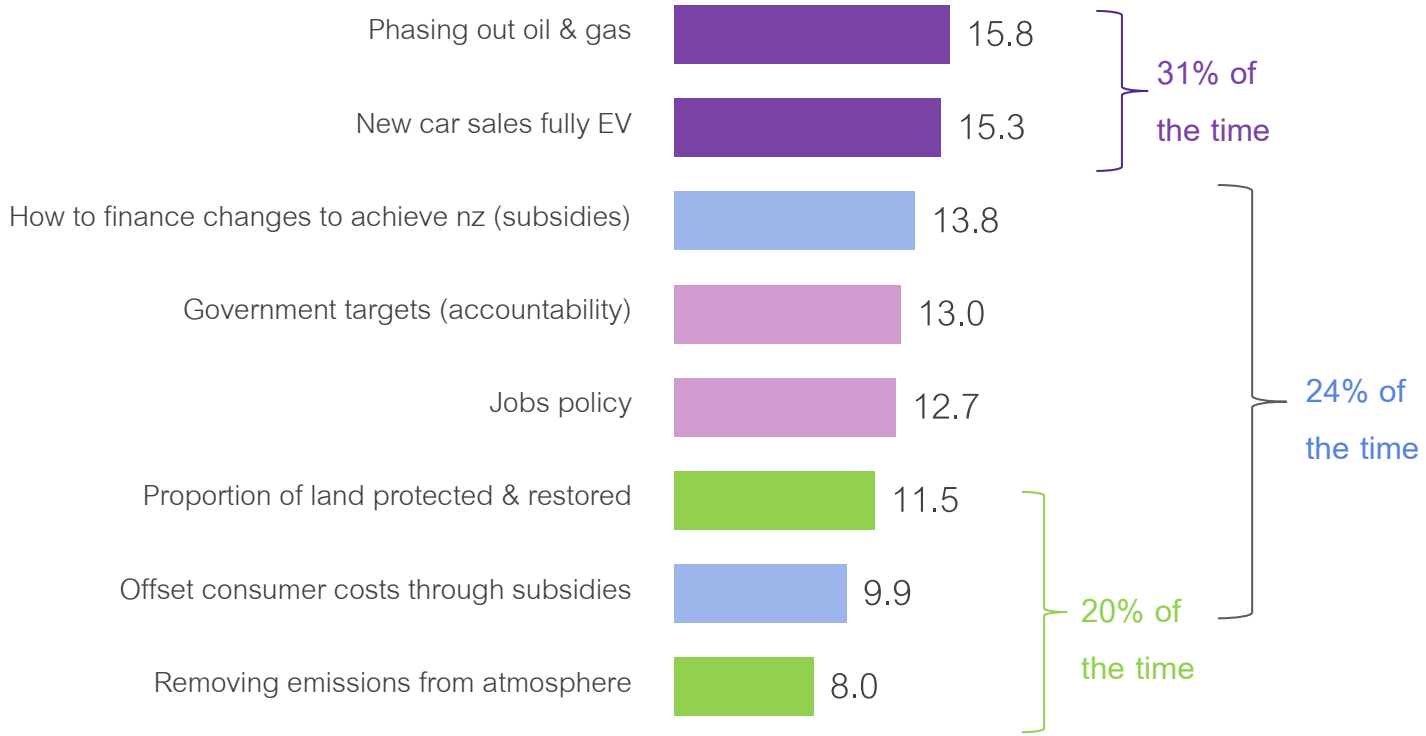
CONJOINT ANALYSIS | WHAT THE EXERCISE LOOKS LIKE

Q. If government in Canada were proposing policy packages to meet net zero by 2050, and these are the only options available, which ONE would you choose?

Policy about jobs in fossil fuel industry (ensuring a just transition)	Help fossil fuel workers find jobs in the clean energy sector (but not offer skills retraining)	Provide skills retraining for fossil fuel workers (but no help finding clean energy jobs)
Timing for phasing out Canada's oil & gas production	By 2030	By 2050
Timing for all new car and truck sales in Canada to be fully electric vehicles	By 2060	Never
Initiatives to remove carbon emissions produced by humans from the atmosphere	Through nature-based solutions (natural carbon sinks such as forests and oceans)	Through technology (pumping it deep into earth's core or into concrete)
Government targets for reducing greenhouse gas emissions	No targets	Voluntary targets set by the federal government
Proportion of Canada's land protected and restored to address biodiversity loss and climate change (current level is 12.5%)	50%	20%
Helping consumers offset costs through government subsidies (i.e., financial aid or support), such as energy efficiency program rebates	Targeted subsidies for low-income households	Universal subsidies for all Canadians
How to finance the changes needed to achieve net zero	Increase subsidies to clean energy companies, while keeping subsidies to fossil fuel companies unchanged	Phase out subsidies to fossil fuel companies, while keeping subsidies to clean energy companies unchanged
	○	○

CONJOINT ANALYSIS | SHARE OF IMPACT*

The conjoint analysis reveals that ghge reduction policies matter most to Canadians when selecting a preferred policy package to meet net zero by 2050. Cost-related policies have the next most impact on choice – suggesting this remains an important issue for Canadians, but there is openness to framing it in terms of "who should pay".



*Outcome = average share of impact each of the eight policies had on respondents' decision – that is, what aspect takes up their conscious thought when presented with each pair of policy packages.

Note: If people were choosing randomly, all policies would have a 12.5% (100/8) share. This approach has the valuable property of ratio-scaling; an item with a score of 10 matters twice as much in the decision as an item with a score of 5. Does not represent the proportion of respondents selecting the policy as "important".

CONJOINT ANALYSIS | SHARE OF IMPACT BY SEGMENT

Digging deeper into the results, we find three segments of Canadians who react quite differently to the policies presented in this study. Their policy orientations are essentially values-driven, and are not limited to any one demographic or political affiliation. This creates an opening to build constituencies of opportunity across the political spectrum, based on what matters to people (rather than what they look like).

Policy	Segment A (32% of sample) Skeptical	Segment B (38% of sample) Pro-reduction	Segment C (31% of sample) Other priorities
Electrification (phase out oil & gas / EVs)	52.5	50.5	21.1
Costs (how to finance NZ, consumer subsidies)	14.6	17.1	24.7
Government targets (accountability)	11.5	6.8	17.0
Jobs policy	11.8	10.4	15.9
NbS / land protection and restoration	9.6	15.2	21.5

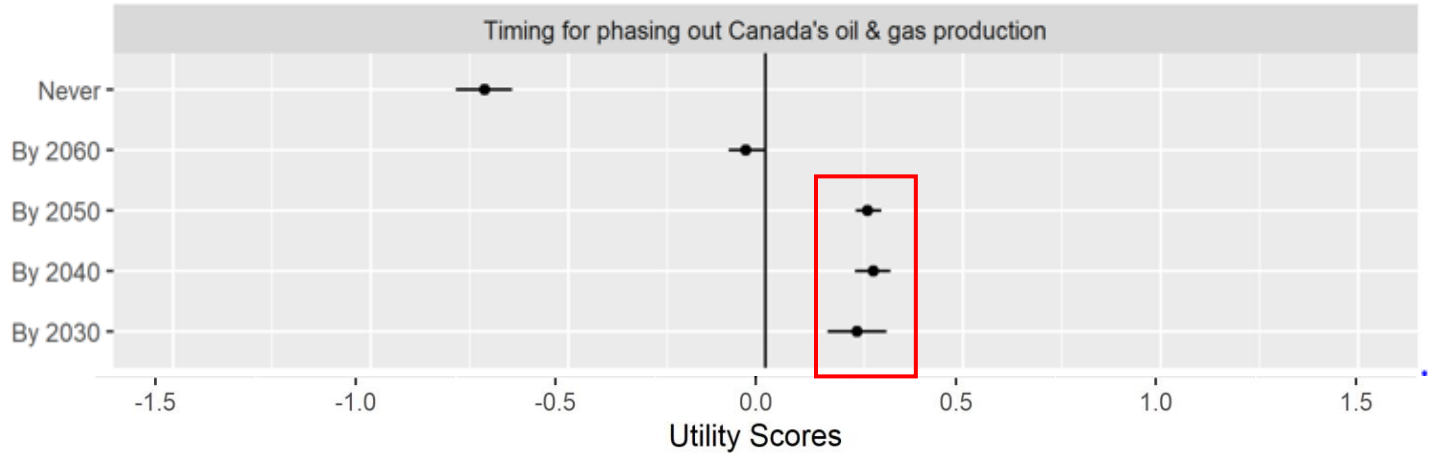
Electrification to occur as late as possible (2060) or never

Electrification to occur as quickly as possible (2030)

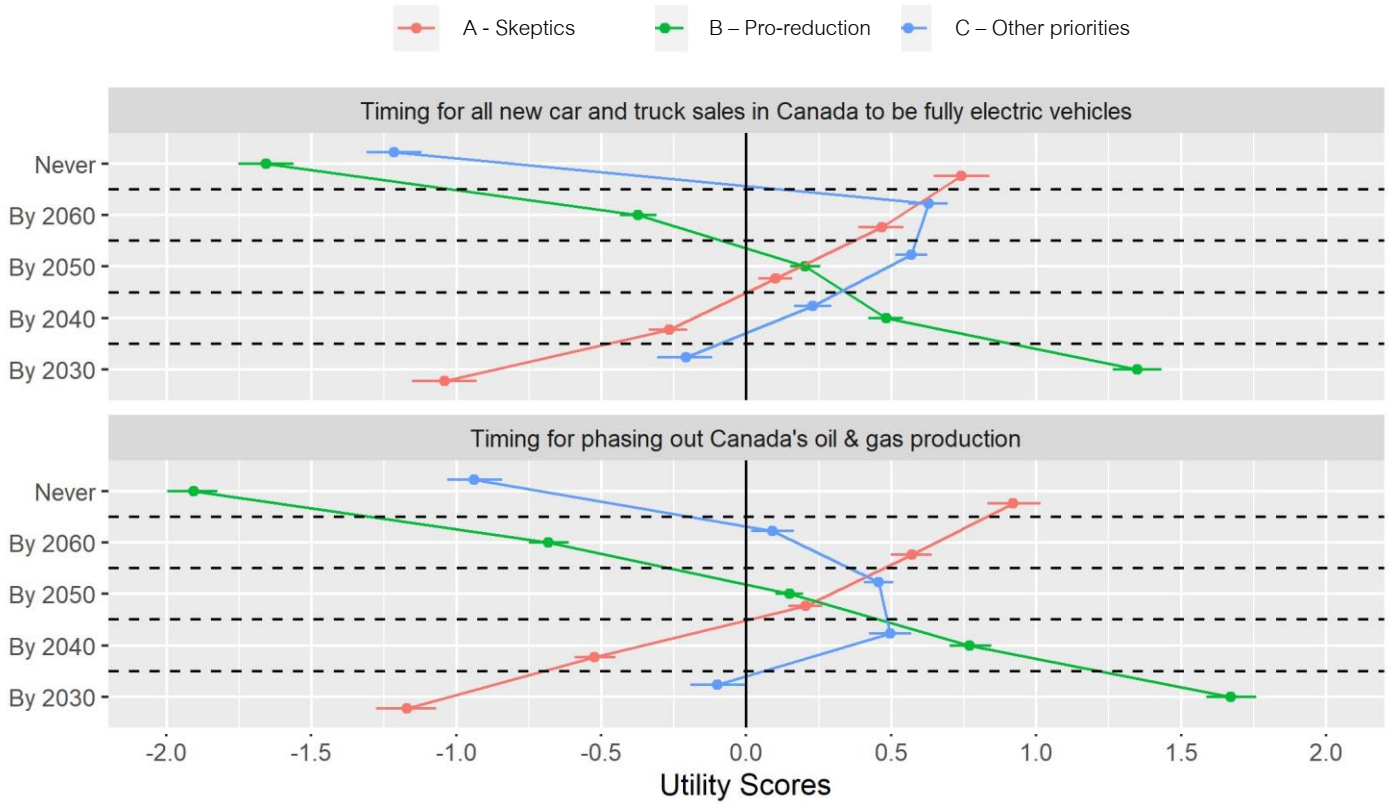
Outcome is average share of impact that each policy had on the choice between two packages. If people were choosing randomly, all policies would have a 12.5% (100/8) share. This approach has the valuable property of ratio-scaling; an item with a score of 10 is twice as important as an item with a score of 5.

RELATIVE SHARE OF PREFERENCE | GHGE REDUCTION

In terms of policies to reduce ghge, slower timelines are relatively more appealing, and considerably more appealing than doing nothing.

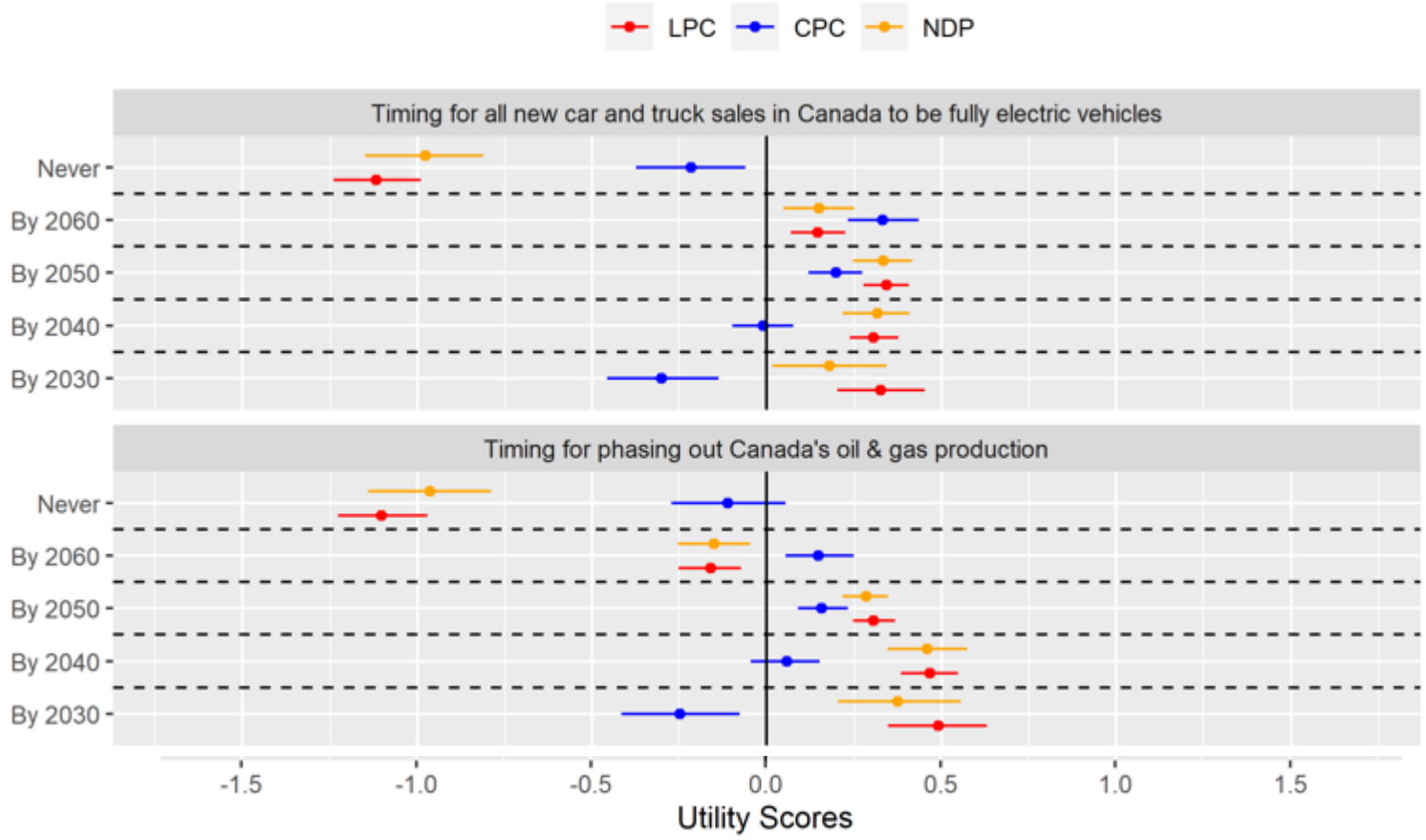


RELATIVE SHARE OF PREFERENCE | BY SEGMENT



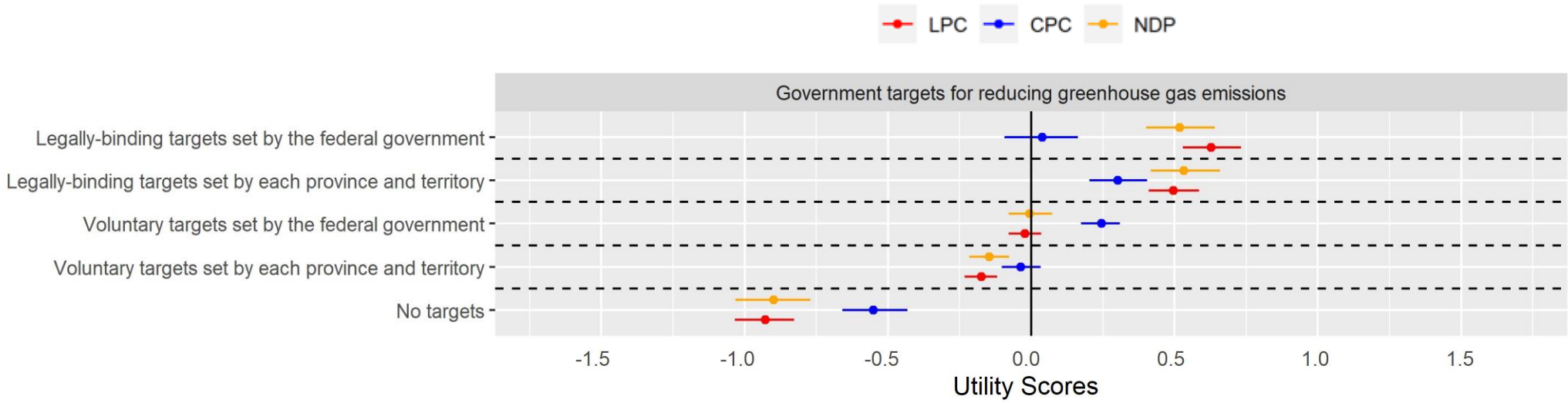
RELATIVE SHARE OF PREFERENCE | BY PARTY

Faster timelines for ghge reduction policies are relatively more appealing to Liberal and NDP voters than to Conservative voters.



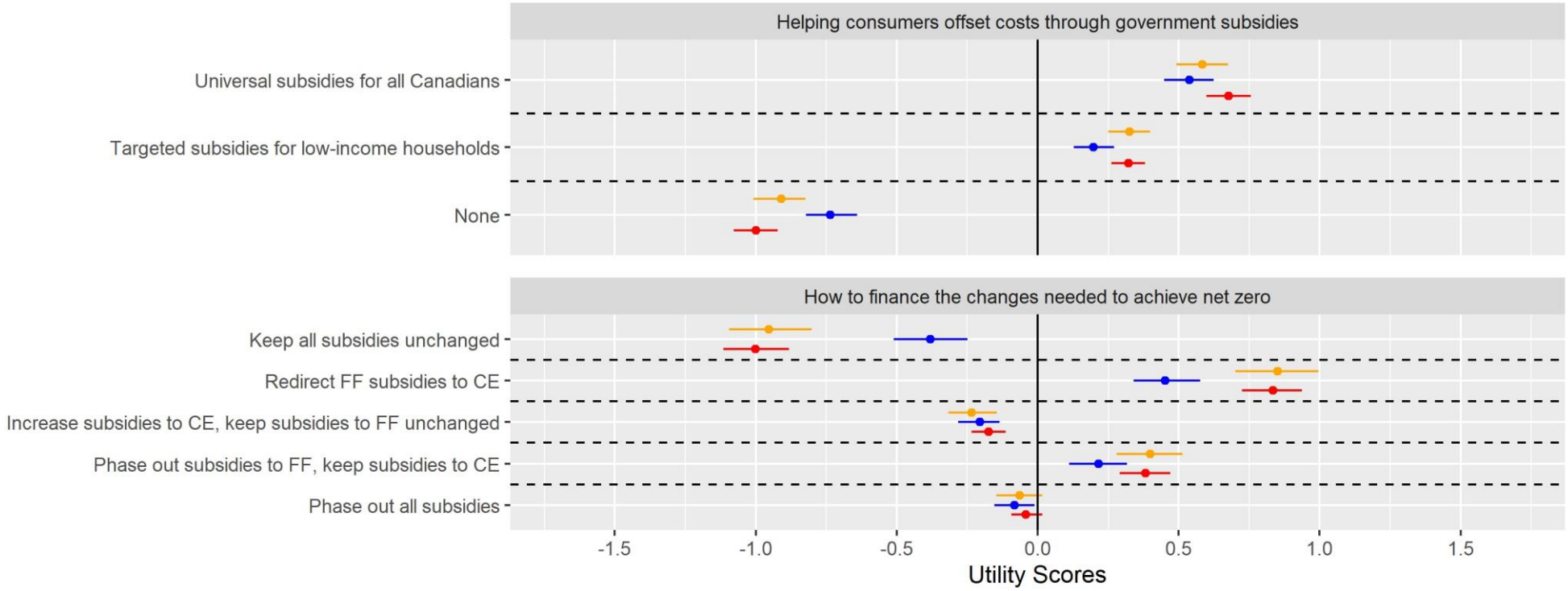
RELATIVE SHARE OF PREFERENCE | ACCOUNTABILITY BY PARTY

There is a gap in preference for accountability mechanisms by political party support. Legally-binding targets are relatively more appealing to Liberal and NDP voters than to Conservative voters, who prefer legally-binding targets set by the provinces or voluntary targets.

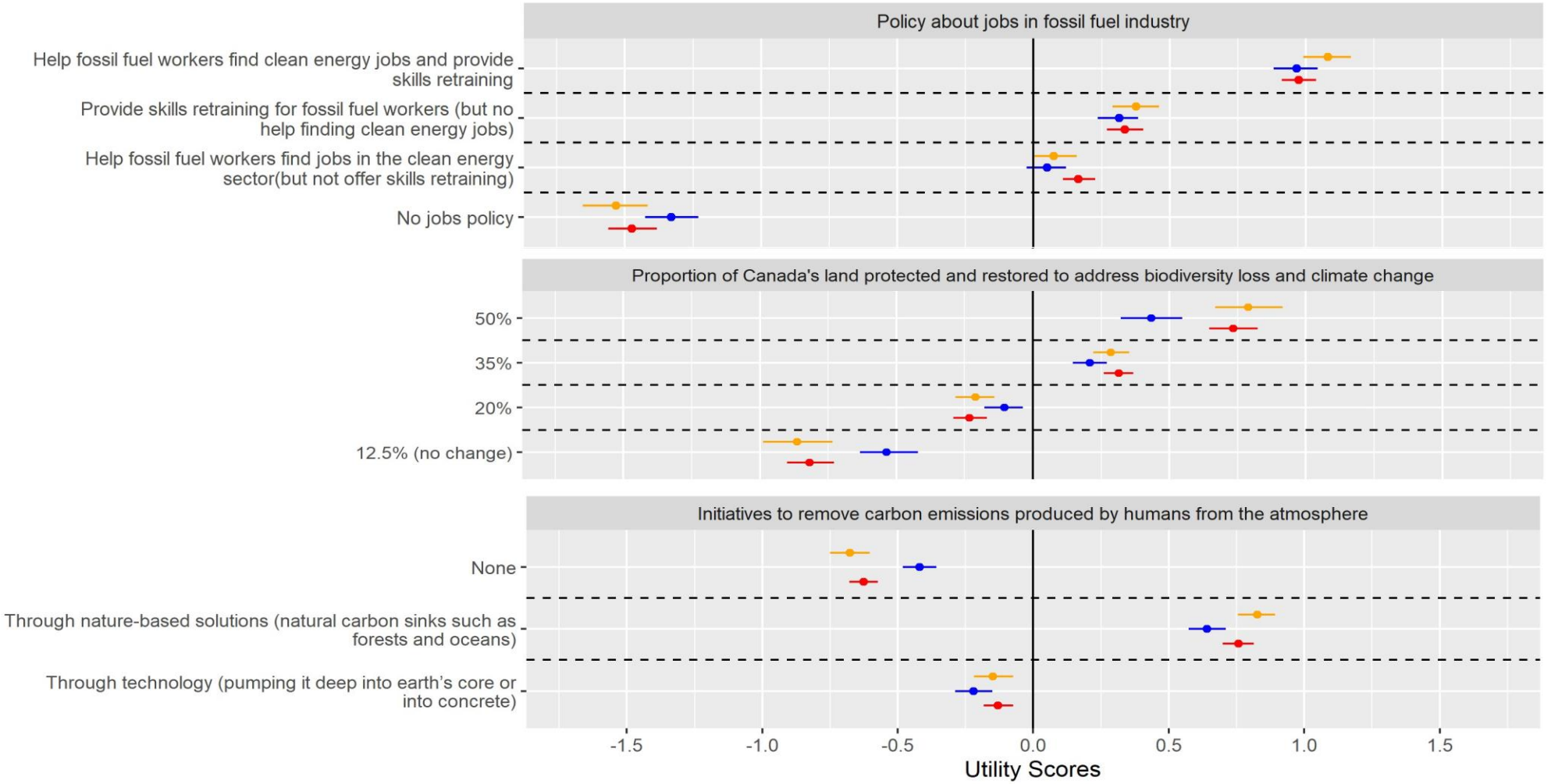


RELATIVE SHARE OF PREFERENCE | HOW TO PAY BY PARTY

Notably, redirecting fossil fuel subsidies to clean energy companies is more appealing than other possibilities, regardless of party affiliation. Relative to Liberal and NDP voters, Conservative voters find the idea of keeping subsidies unchanged more appealing. Relative preference for consumer subsidy options are similar across party lines.



RELATIVE SHARE OF PREFERENCE | OTHER BRIDGES BY PARTY



WRAP-UP

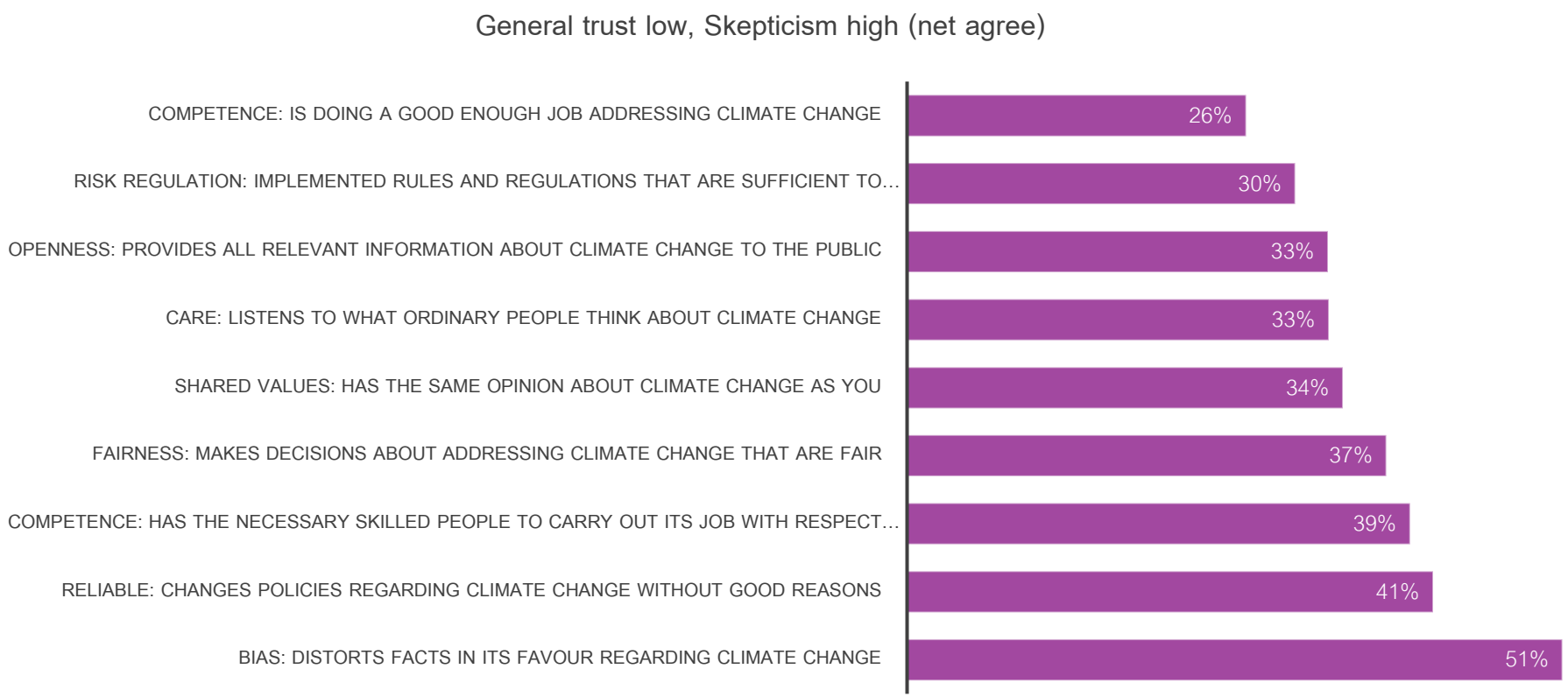
- Lack of preference for immediate & abrupt change is not (only) because people aren't prepared for it, **but because they don't believe it can happen**. The public does not understand the mechanics and potential of the various solutions.

- **Canadians need proof or evidence of something that demonstrably moves the needle**. Thus, communications should identify not just gaps but the progress made – accountability (measurement and reporting) has an important role to play here.

- **The next step is then to build wider support (or reduce opposition) through initiatives that matter to different constituencies**: affording change through consumer and industry subsidies, jobs and skills retraining for fossil fuel workers, and nature-based solutions.

TRUST

TRUST


General trust low, Skepticism high (net agree)
COMPETENCE: IS DOING A GOOD ENOUGH JOB ADDRESSING CLIMATE CHANGE
26%
RISK REGULATION: IMPLEMENTED RULES AND REGULATIONS THAT ARE SUFFICIENT TO...
30%
OPENNESS: PROVIDES ALL RELEVANT INFORMATION ABOUT CLIMATE CHANGE TO THE PUBLIC
33%
CARE: LISTENS TO WHAT ORDINARY PEOPLE THINK ABOUT CLIMATE CHANGE
33%
SHARED VALUES: HAS THE SAME OPINION ABOUT CLIMATE CHANGE AS YOU
34%
FAIRNESS: MAKES DECISIONS ABOUT ADDRESSING CLIMATE CHANGE THAT ARE FAIR
37%
COMPETENCE: HAS THE NECESSARY SKILLED PEOPLE TO CARRY OUT ITS JOB WITH RESPECT...
39%
RELIABLE: CHANGES POLICIES REGARDING CLIMATE CHANGE WITHOUT GOOD REASONS
41%
BIAS: DISTORTS FACTS IN ITS FAVOUR REGARDING CLIMATE CHANGE
51%

TRUST

Probability of increase or decrease in general, skeptical and critical trust

General trust	Hopeful after election	Confident solve climate	Effective energy transition	Informed energy transition
Fairness	3x***			
Openness				
Shared values	2.6x***	2.3x***		
Bias	49.5%*** (-.703)			
Reliable				
Lobbying effective				1.7x**
Government collaboration effective			1.7x***	
Donate env/cons groups effective			1.7x***	
Energy transition effective	1.6x***			
Critical trust (interaction)		3.4x***		

Q&A