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The View from Main Street: Environmental Stewardship – *How far have we come in public opinion in 15 years?*

John Wright, Senior Vice President

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Methodology...

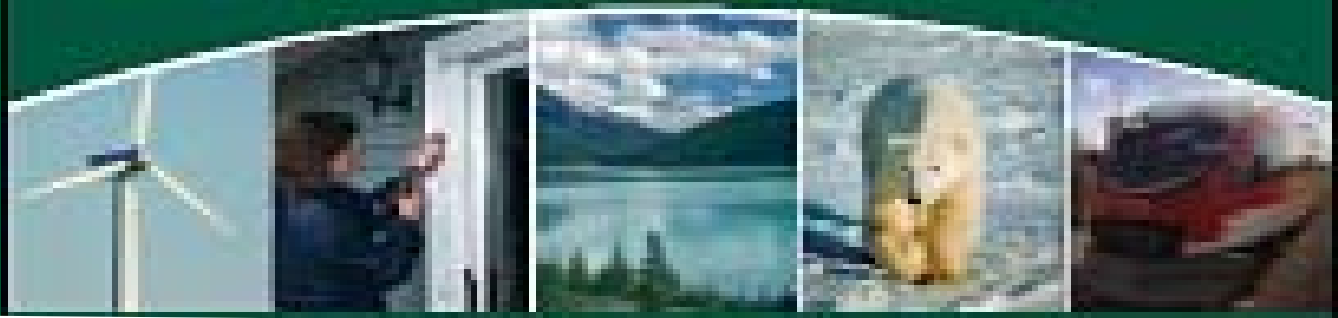
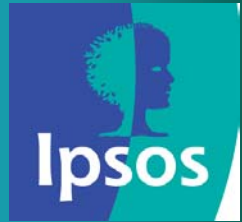
- Two studies were undertaken on our National Telephone Omnibus...
- The first, dealing with aspects of “stewardship”, was done in November, 2005...sample size 1,060 adult Canadians with a margin of error of +/- 3.2
- The second, dealing with climate change and global warming, was completed in March, 2006 with a sample size of 1,621 adult Canadians with a margin of error of +/- 2.4
- Where shown, results have been compared with an Angus Reid survey of 1990 involving 1,659 Canadian adults
- All three of these studies were produced in-house with no client sponsorship

Introduction...

- The Public Opinion Context: Setting The Stage For Your Conference
- The Issue As Examined: 1989 To 2006
- 1989 To 1993:
- The External Environment: A,E,I,O,U And Mostly Y—
- Aerosol, Exxon Valdez, Inanimate (Rocks, Water, Wood, Air), Ozone And “Us”...You Can Make A Difference
- “Deliberative Judgment”: The Emergence Of Segments—Activists, Activated, Anxious, Agitated...
- Efficacy And How We Could Personally Make A Difference... Blue Box, Green Programs, Regulation...
- The Theme Was “Hope Vs. Fear”...
- Collectively, If Each One Does Their Part, We Can Get This Under Control...

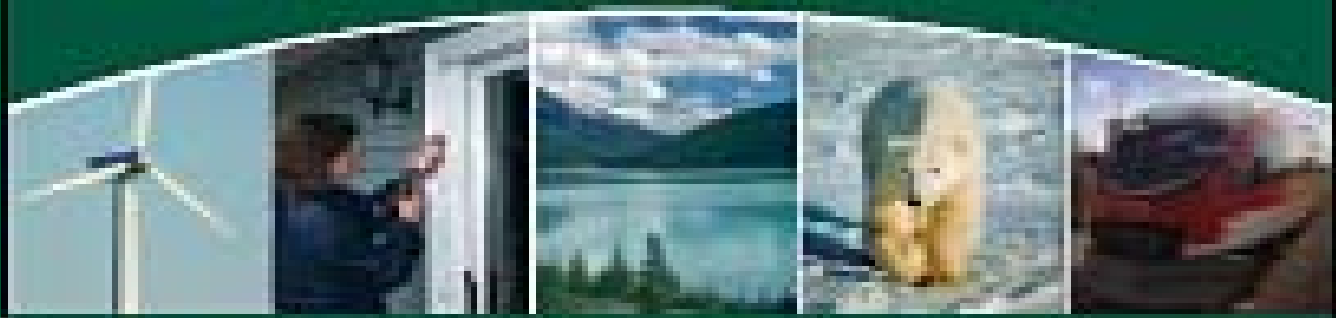
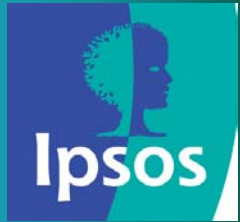
Introduction...

- From 1993 to 2004 The Issue Morphed From Concern About The “External Inanimate Environment” To That Of The “Internal Animate Environment”— Not So Much about The Plastic Jar Recycling But Rather What’s In It: Genomes, BSE, Mad Cow, Additives...Leading To The Natural Extension of Obesity As An Issue...
- From 2004 Onwards...Uber Conditions Dominate...Kyoto, Global Warming, Climate Change ...Are These Things Beyond Our Grasp...Has The Great Green Collective Failed?...Resignation, Pessimism... Do We Just Do What We Can?
- I’m Now Going to Show You Some Recent Public Opinion Research On Attitudes About The Environment And Stewardship And Compare It, Where Appropriate, With The Early 1990’s...
- And Then I’ll End With Attitudes About Climate Change Collected This Week...



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Retrospective And Gestalt...



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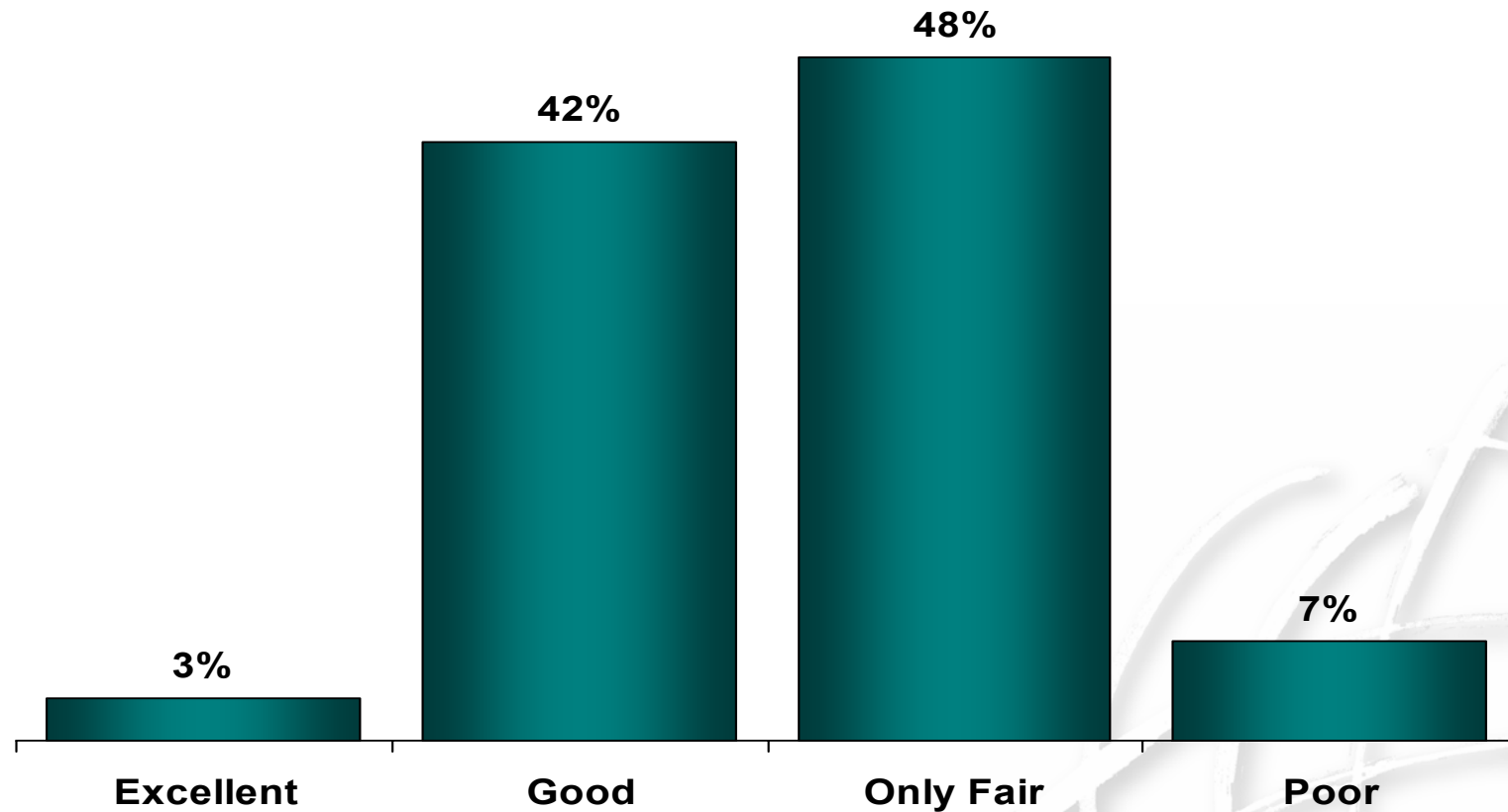
15 Years Ago...

45% Said The Environment Would Be Better By Now...

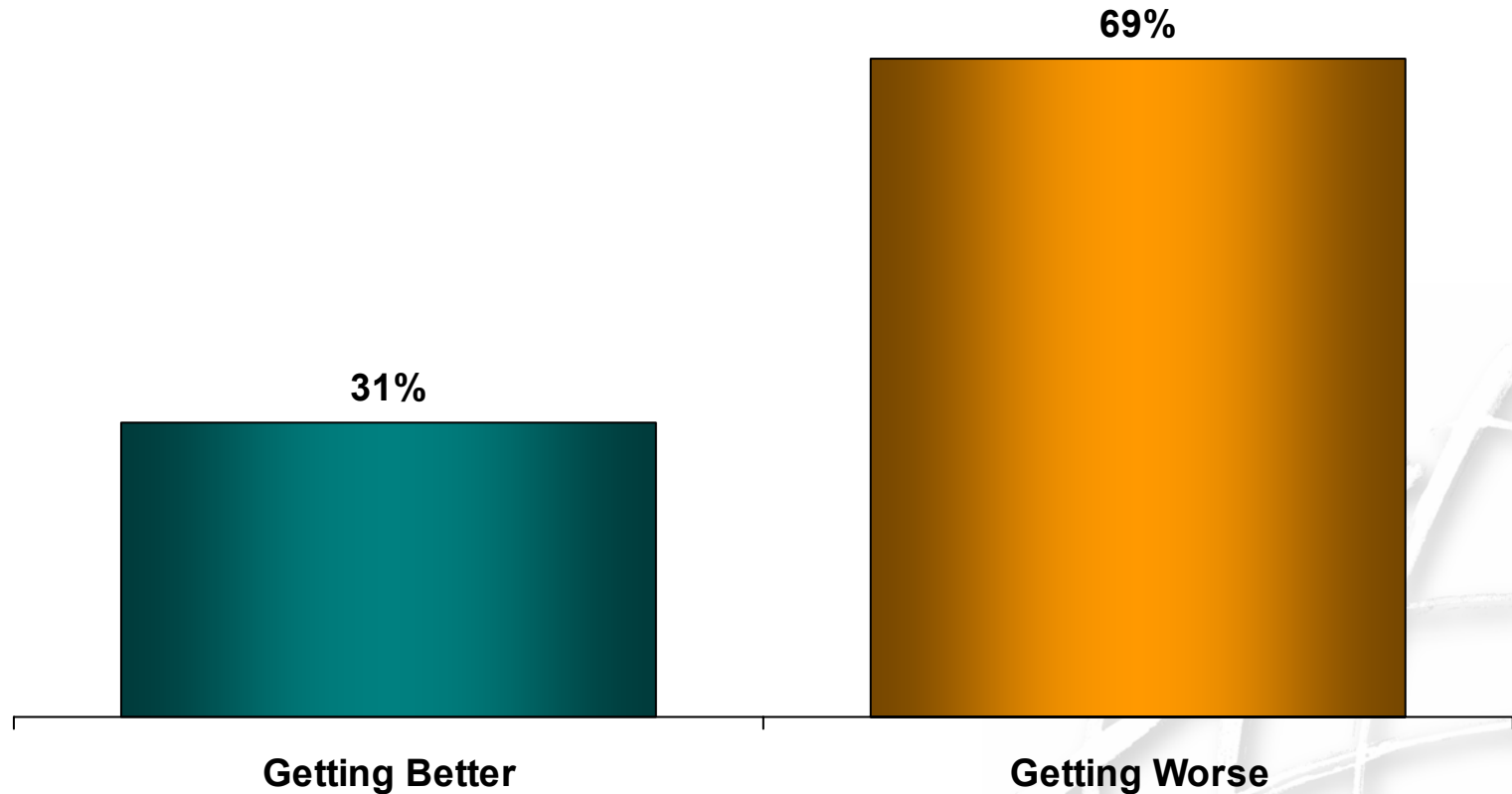
Only 36% Said It Would Be Worse...

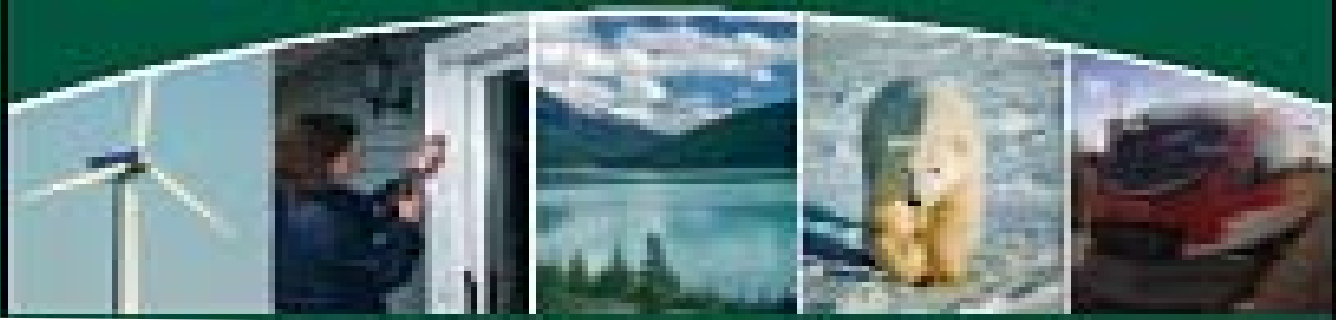
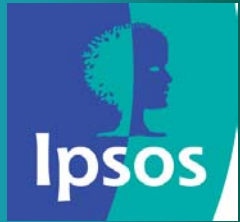
Well, Today, 45% Of Canadians Describe The Quality Of The Environment In Canada As Either Excellent (3%) Or Good (42%)...

55% Say It's Only Fair (48%) Or Poor (7%)...But...



7 in 10 (69% Contrasted With The Previous 36%) Say The Quality Of The Environment In The Country As a Whole Is Getting Worse...

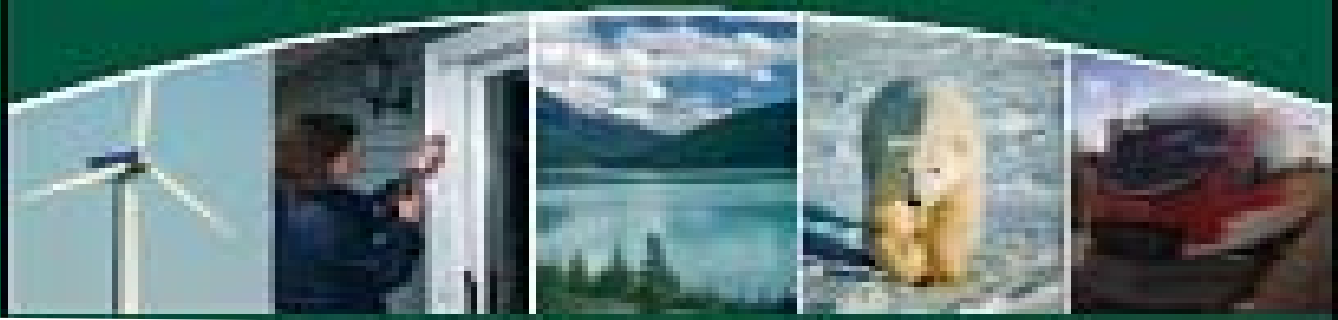
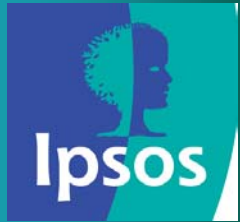




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**So, What Did Canadians See
As The Top Environmental
Issues Facing Us At The End
Of 2005...?**

**At A Country And Then
The Community Level...**

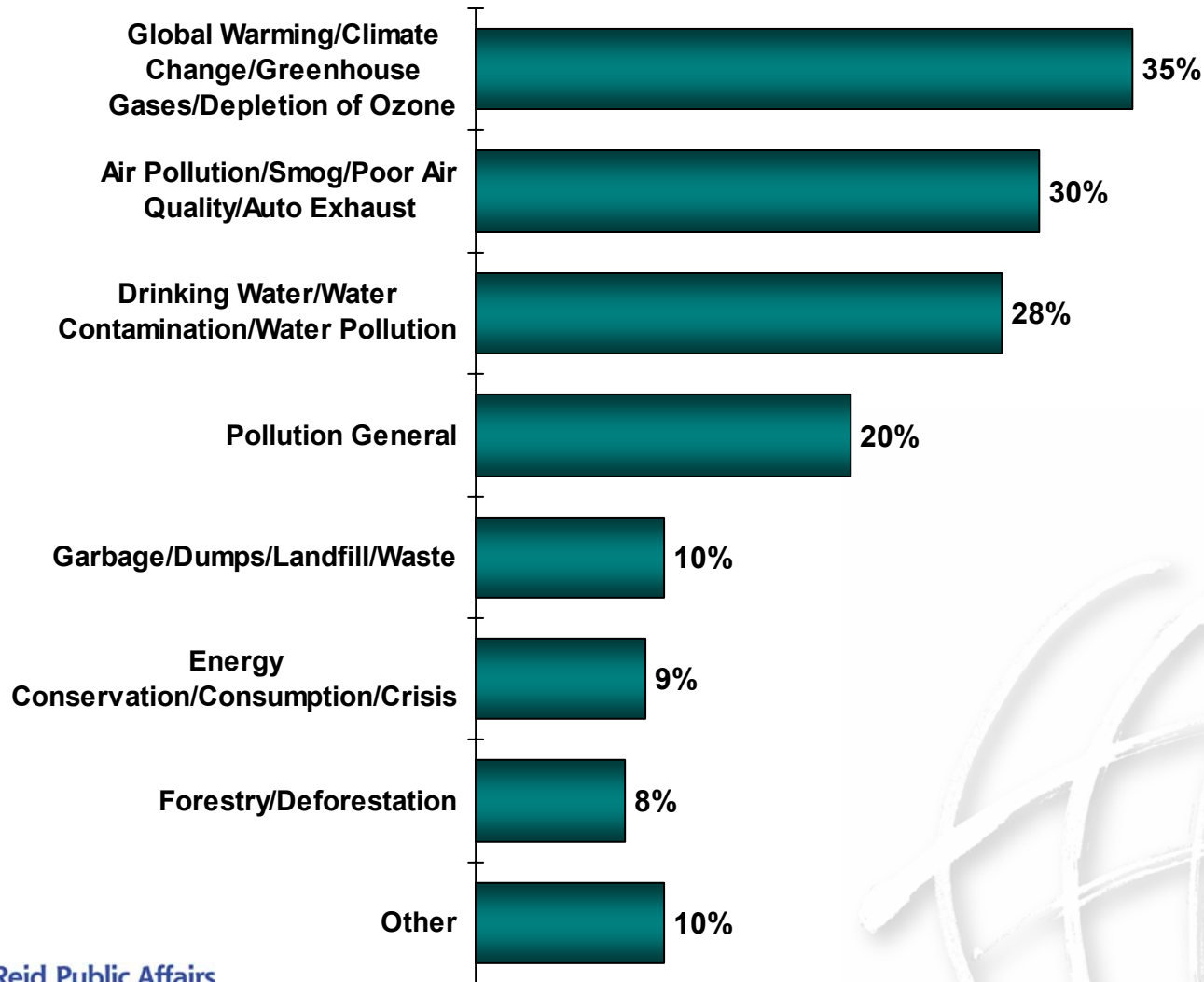


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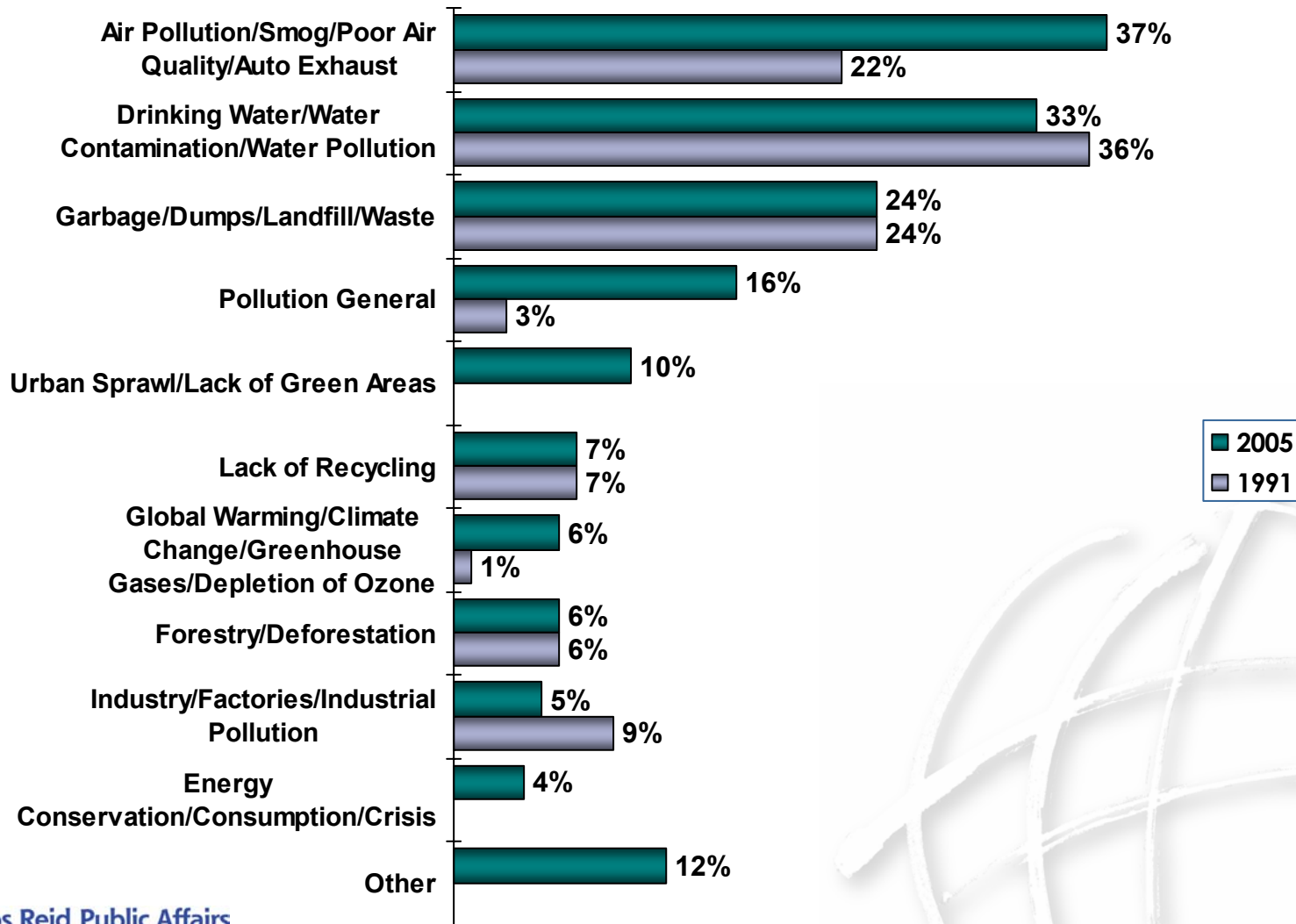
**Well, In 1991
The Top Environmental Issues
Challenging Canadians Were
Water (31%), Air Pollution (25%)
And Ozone Depletion (20%)...**

***And, Concern About Global
Warming From The Greenhouse
Effect Was 4%...***

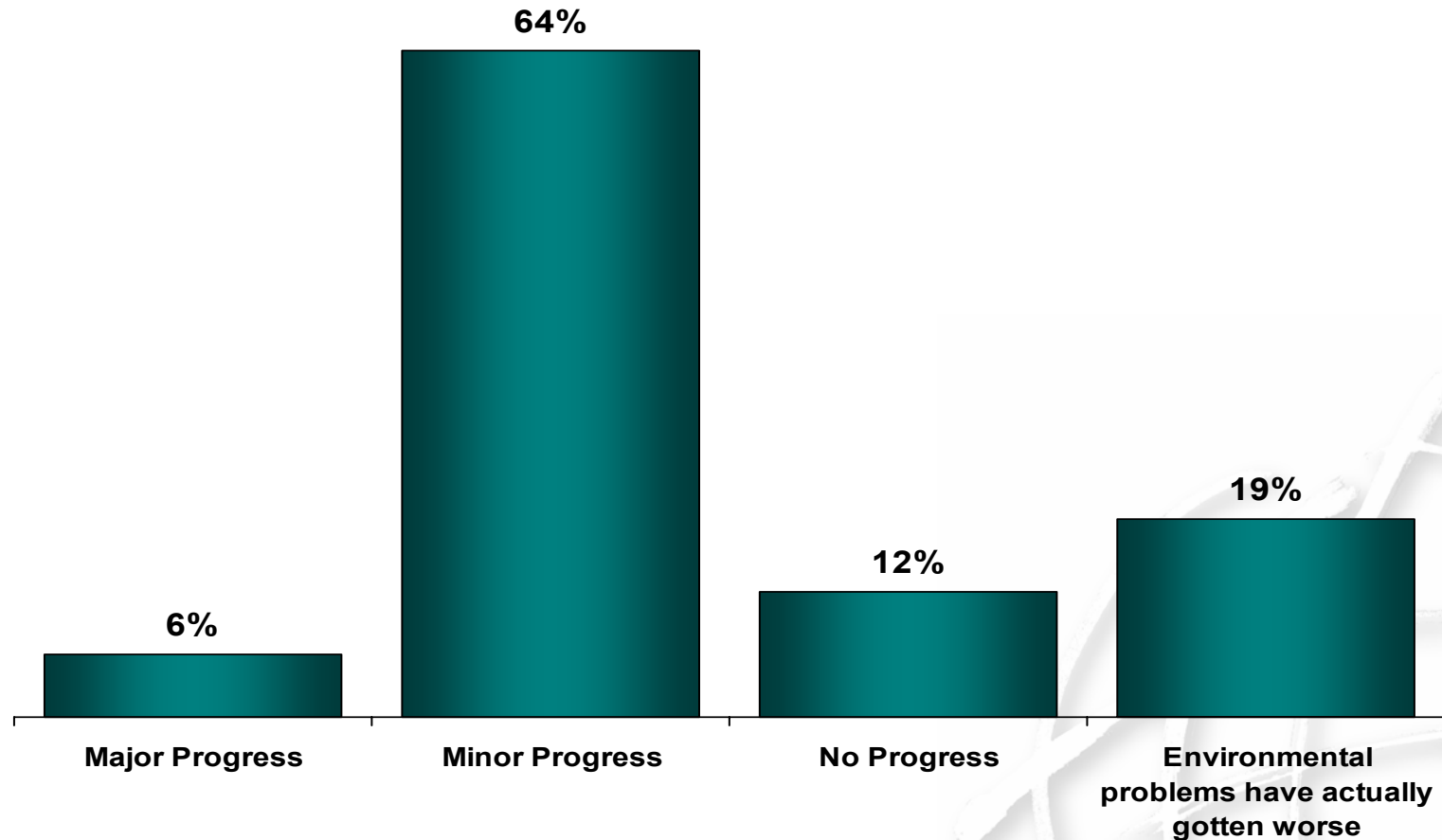
Today, Global Warming (35%), Air Pollution (30%) And Drinking Water Contamination Are The Top Environmental Issues Facing Canadians That Should Be *Urgently* Addressed By Their Governments And Business Leaders...



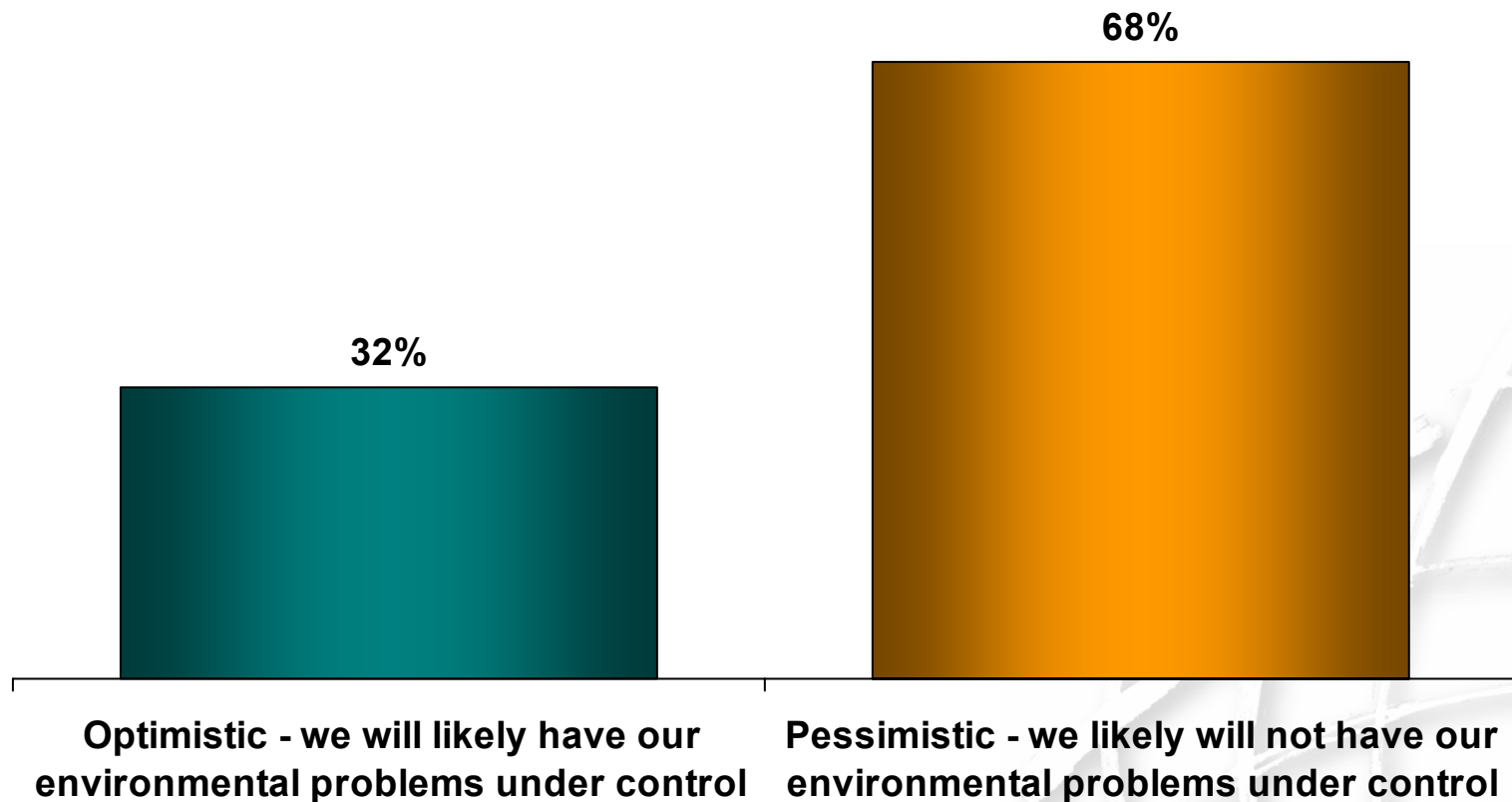
And In Their Community, Air Pollution (37%) Leads, Up 15 Points Since 1991...Urban Sprawl (10%) Has Its Own Category And Even Global Warming (6%) Appears...



Two Thirds (64%) Believe We've Made Only *Minor* Progress On these Issues Since The First Earth Day Some 30 Years...

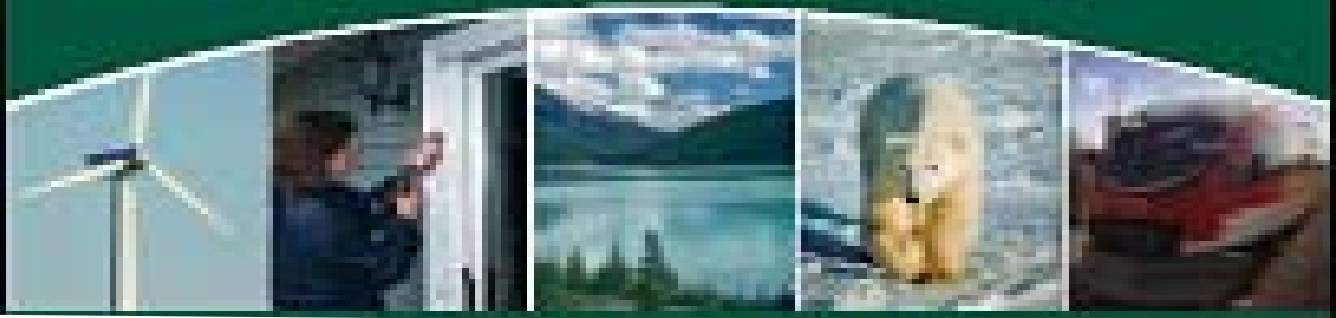
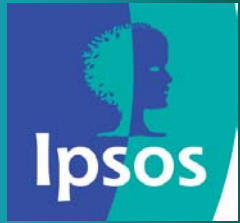


And Only 32% Are Optimistic We Will Get These Environmental Issues Under Control In The Next 20 Years...Decidedly Pessimistic...



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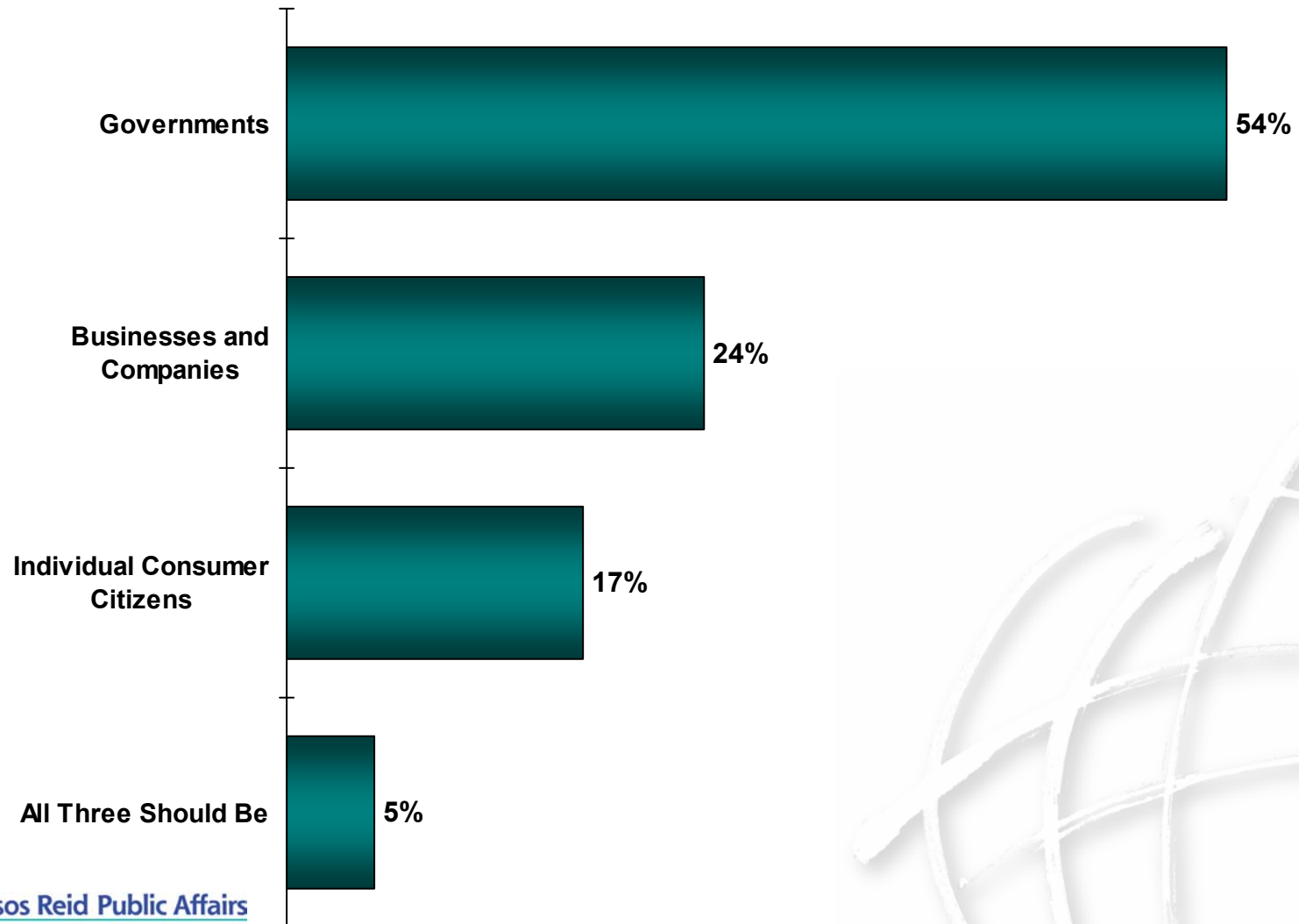
Would you say you are optimistic or pessimistic that we will have our environmental problems well under control in 20 years?
Base: All respondents N=1060



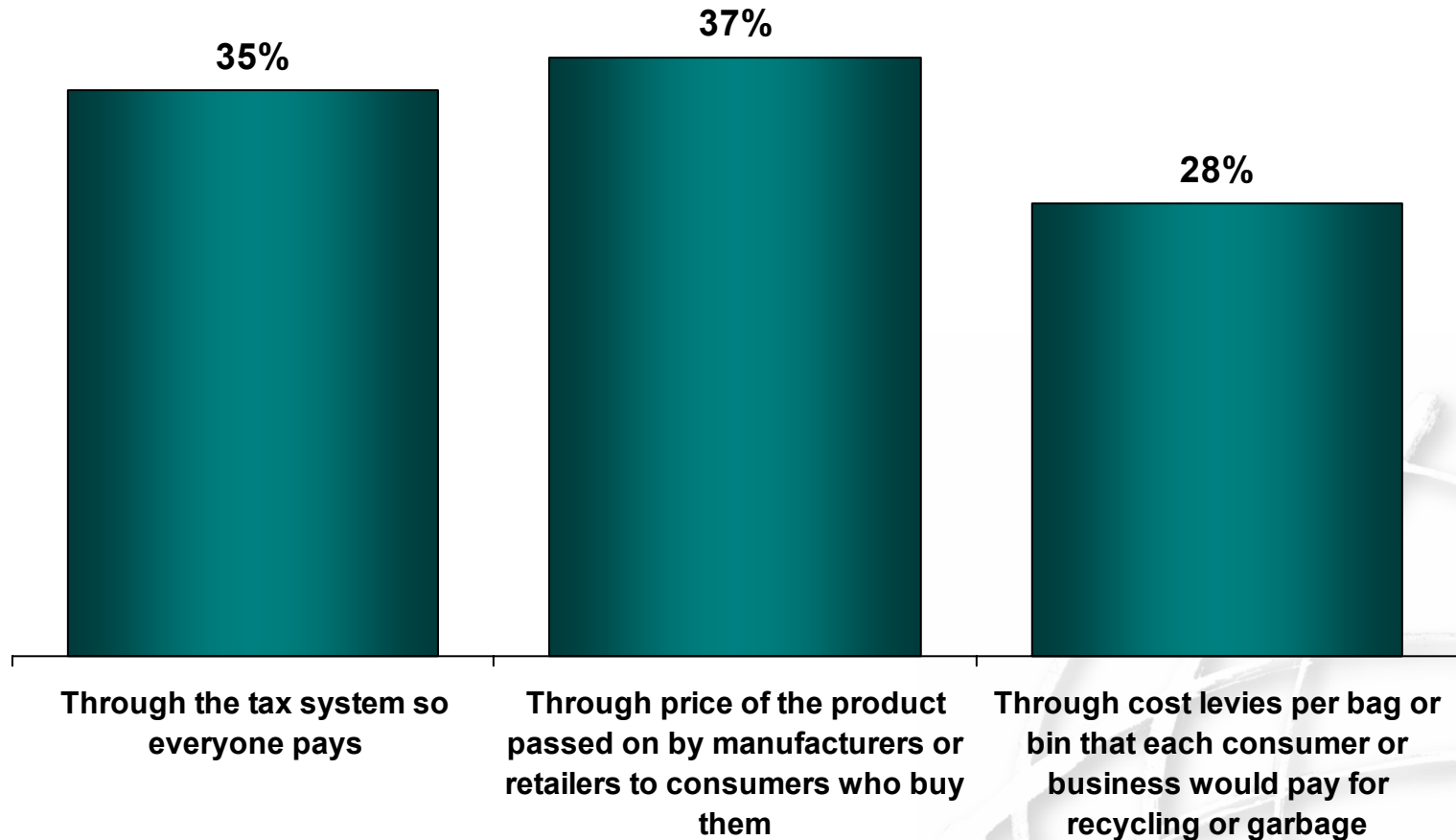
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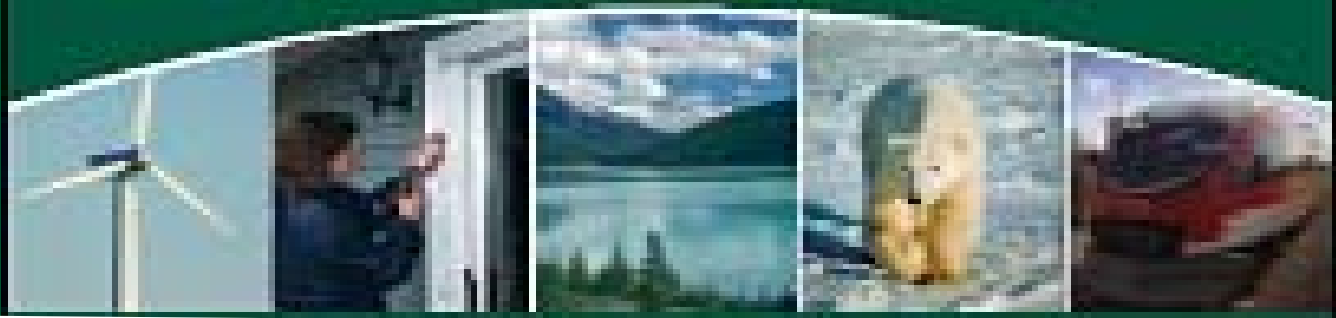
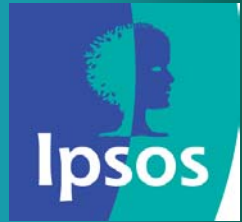
**So, Of These *Urgent* Issues
In Their Community,
Who Should Take
The Most Action To Deal
With It?**

Half (52%) Say “Government”, A Quarter (24%) Say Business And Companies...And 17% Say “Individual Consumer Citizens”...Interestingly, Only 5% Volunteer That All Three Should...



And When It Comes To Who Should Pay For An Environmental *Icon* Like Recycling, There Is No Consensus...

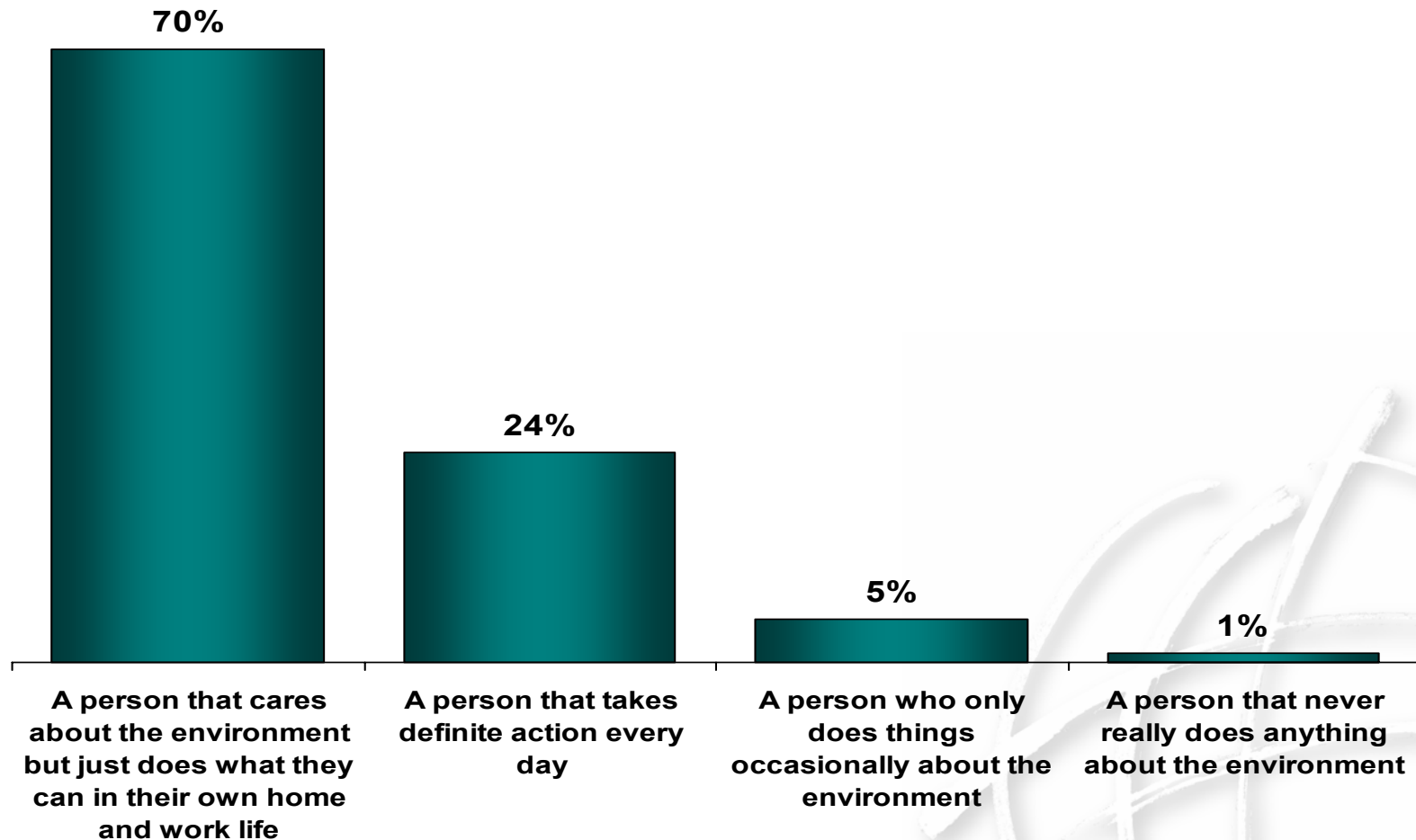




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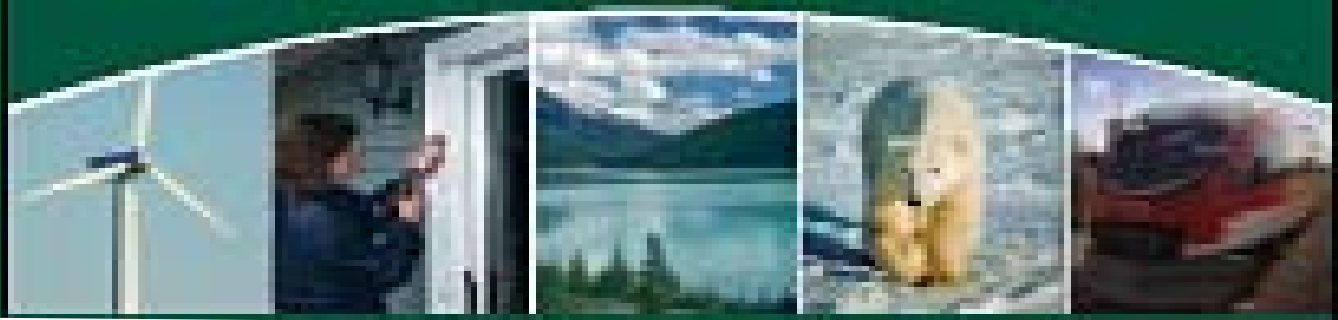
**So, When It Comes To The
Environment Issues, How Do
Canadians Segment
Themselves?**

Most (70%) Care But Just “Do What they Can”...Compared With 24% Who Take Definite Action Every Day...Almost the Same By 1993...From *Vanguard* (18%) In 1989 To *Activated*... 5% Only Occasionally...



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Which one of the following descriptions best describes how you personally deal with environmental issues in your community on a day-to-day basis. Would you describe yourself as . . . ? Base: All respondents N=1060

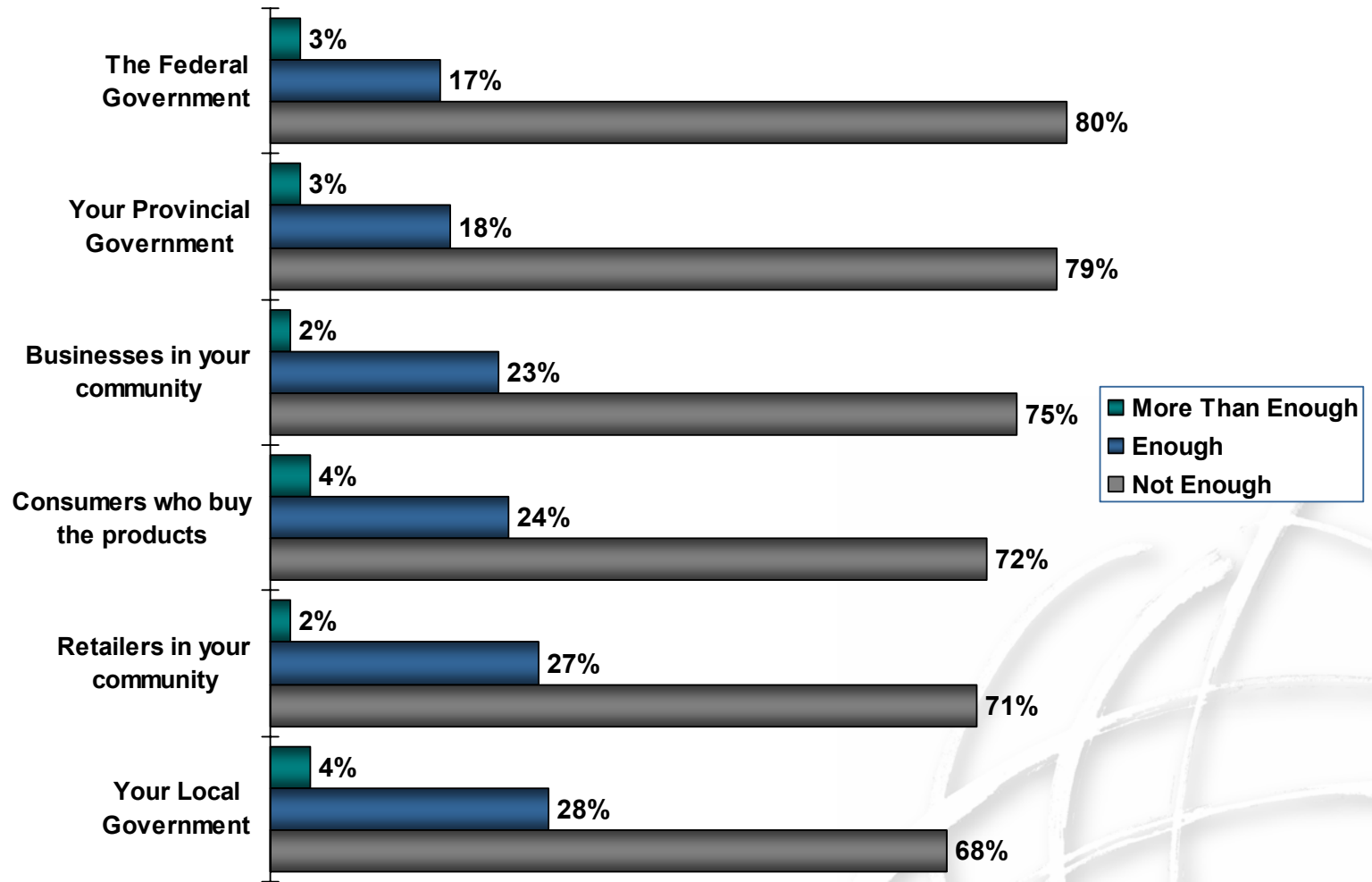


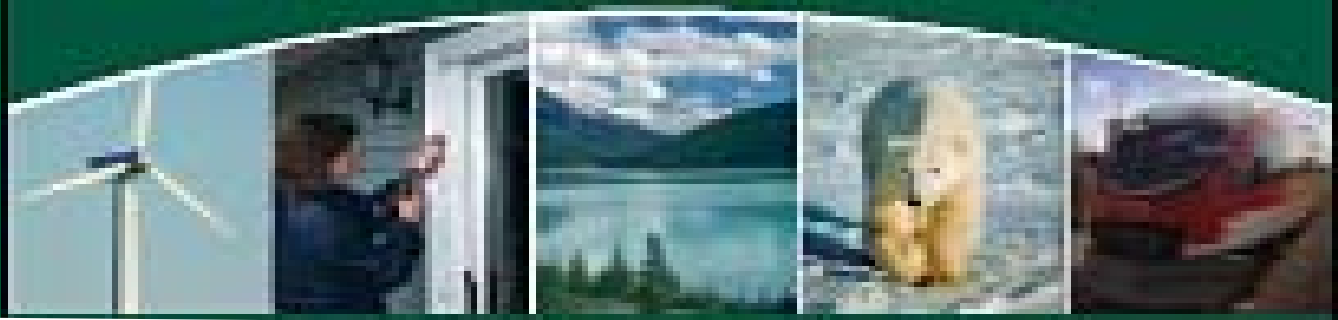
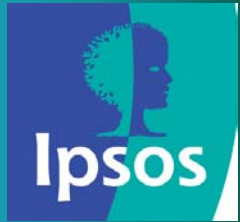
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And What of *Product Stewardship*?

Who's Doing *More Than Enough* When It Comes To Their Role In Reducing The Impact Of Products On The Environment?

Everyone Gets Failing Grades: Even Consumers...A Collective Failure...



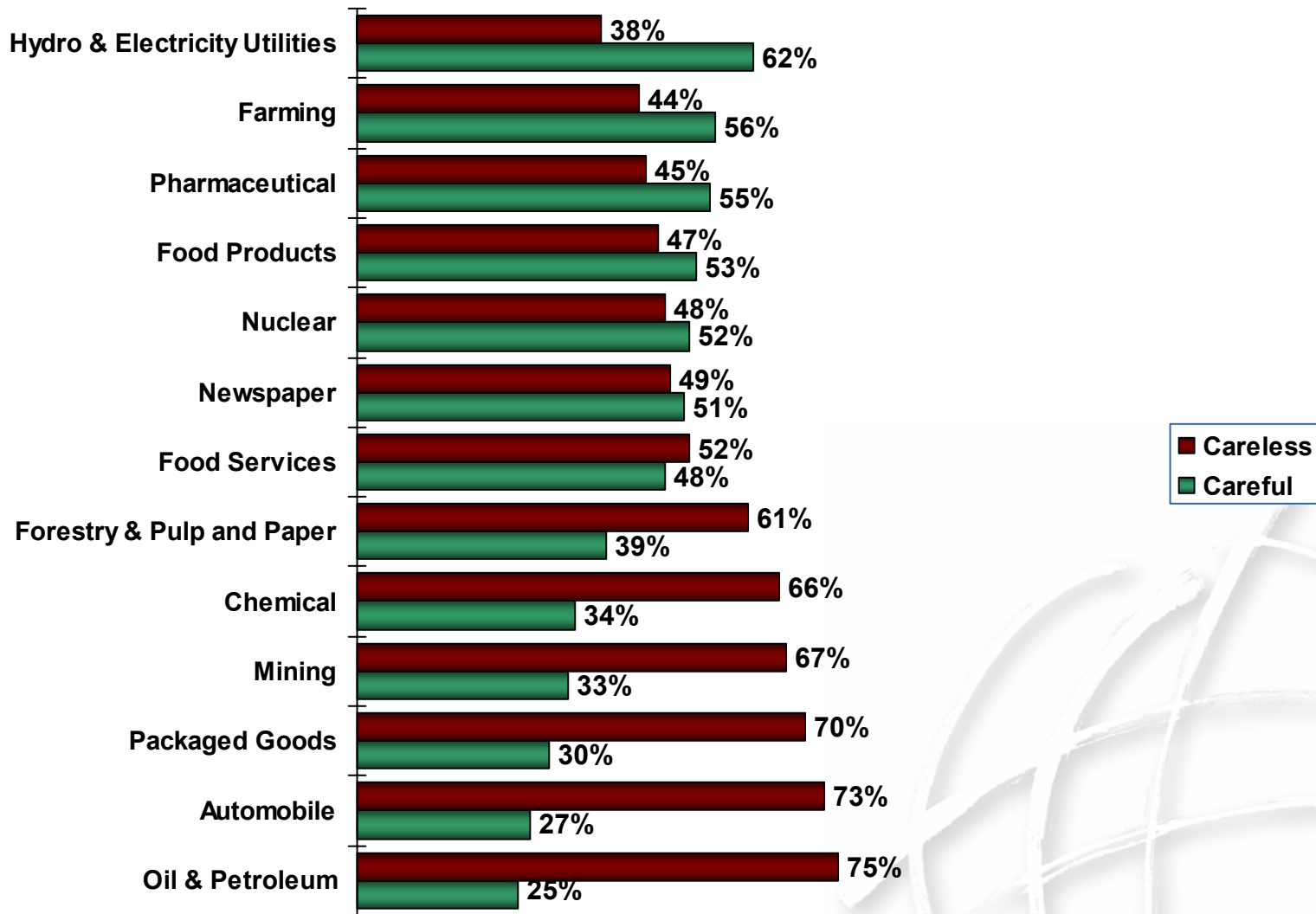


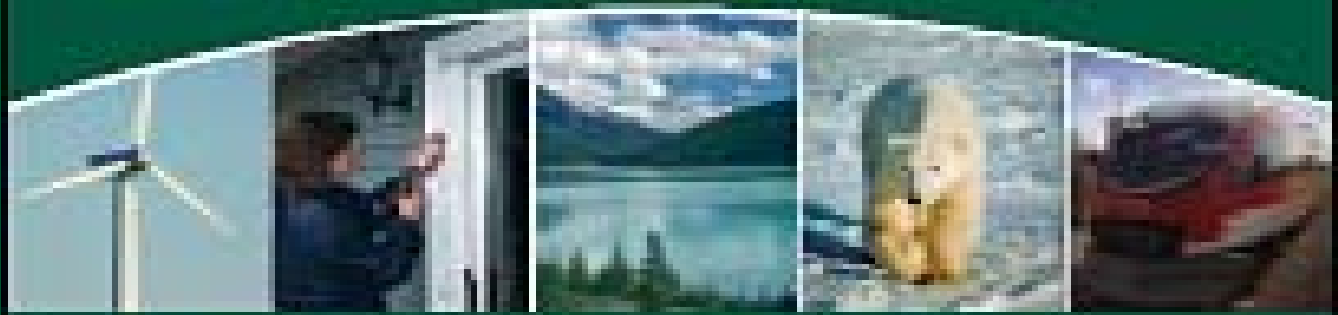
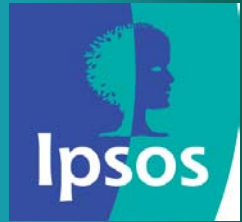
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**And What of Individual
Sectors And Their *Product
Stewardship Today?***

**Are They *Careful Or
Careless?***

Careful and Careless: Energy At The Top...And At The Bottom...

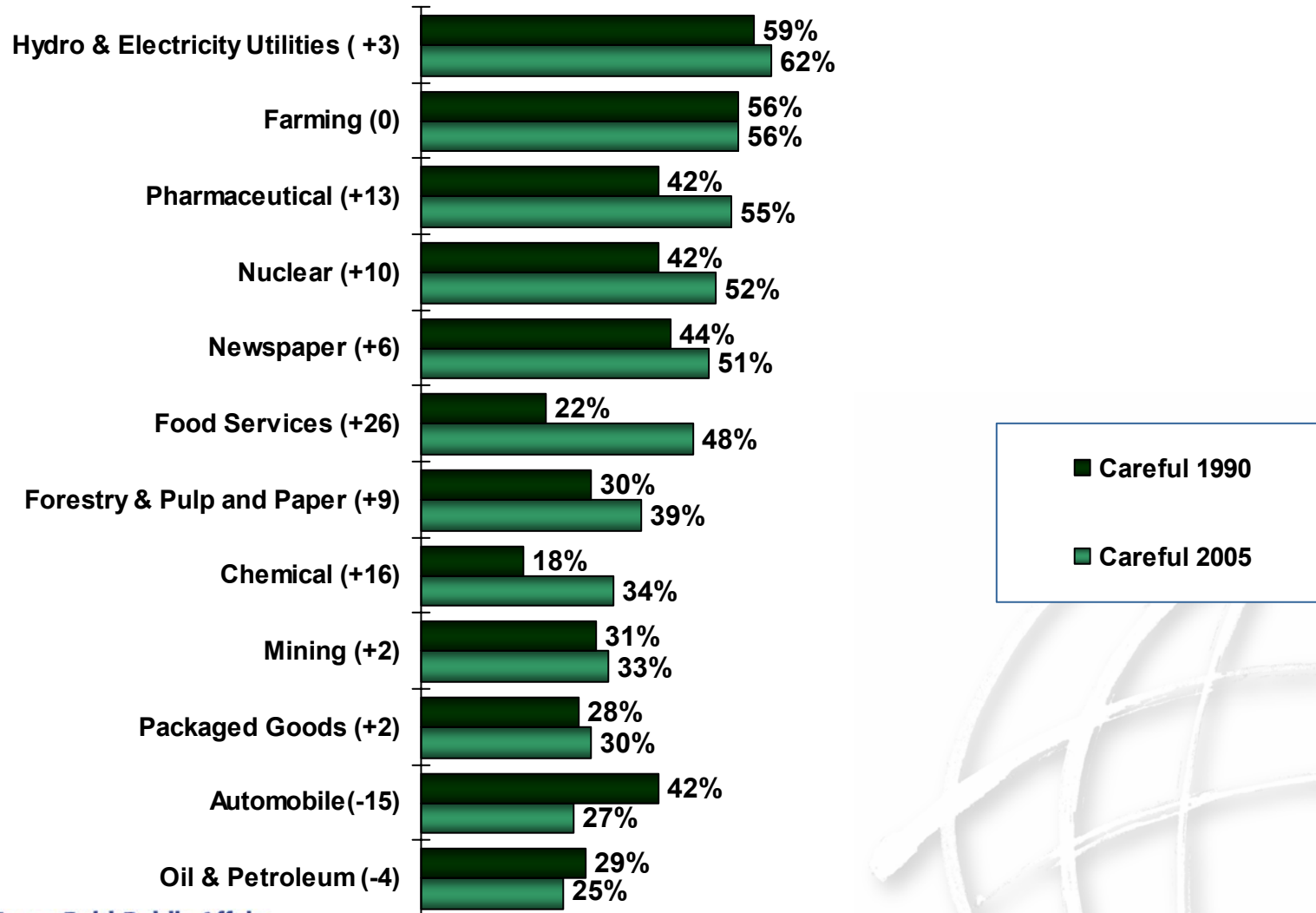


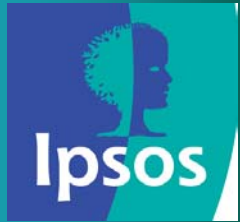


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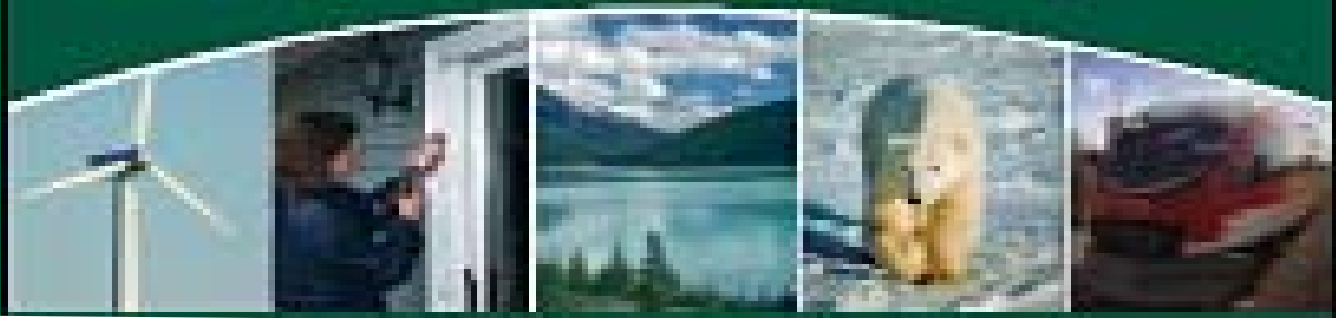
**And Are They More *Careful*
Or *Careless* Compared To 15
Years Ago?**

Most Have Improved Their *Careful* Rating...This Collective Has Moved Up An Average Of 6 Points...



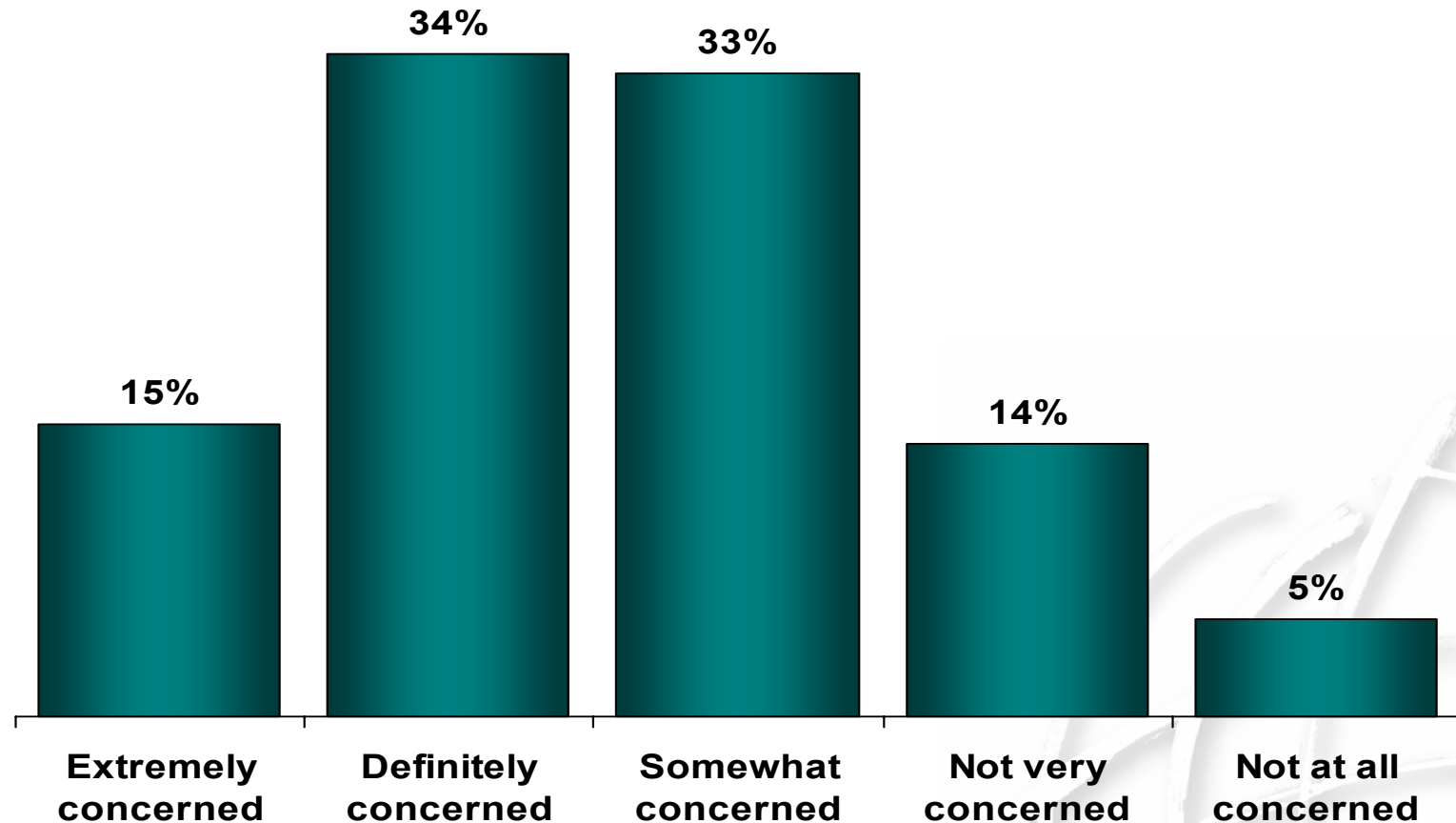


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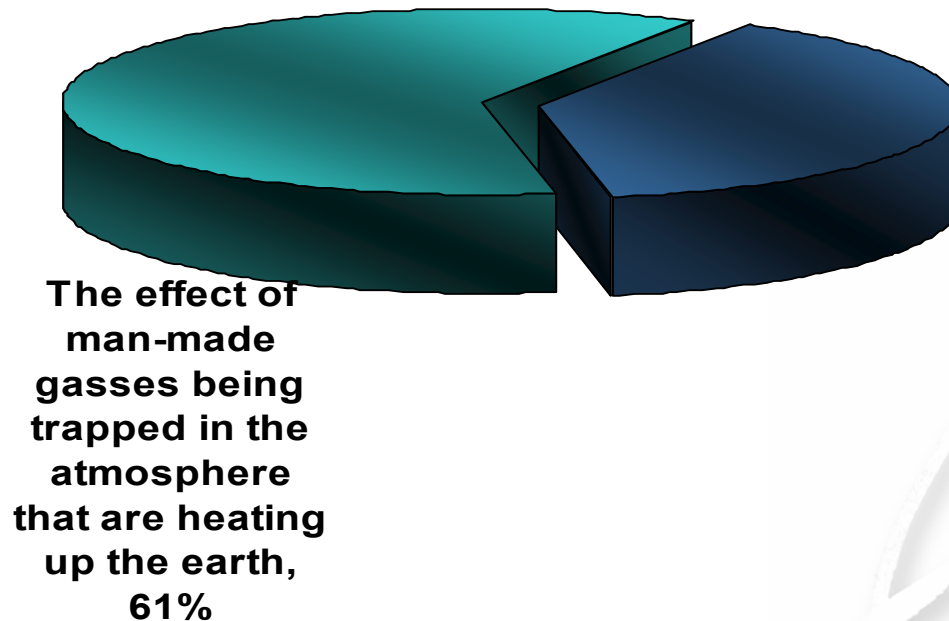


So, What About Climate Change?

This Week, Half (48%) Of Canadians Say They're Very Concerned About Climate Change...one-third "Somewhat"...19% Not Really...These Numbers Are Virtually Identical to 2004 And 2005...

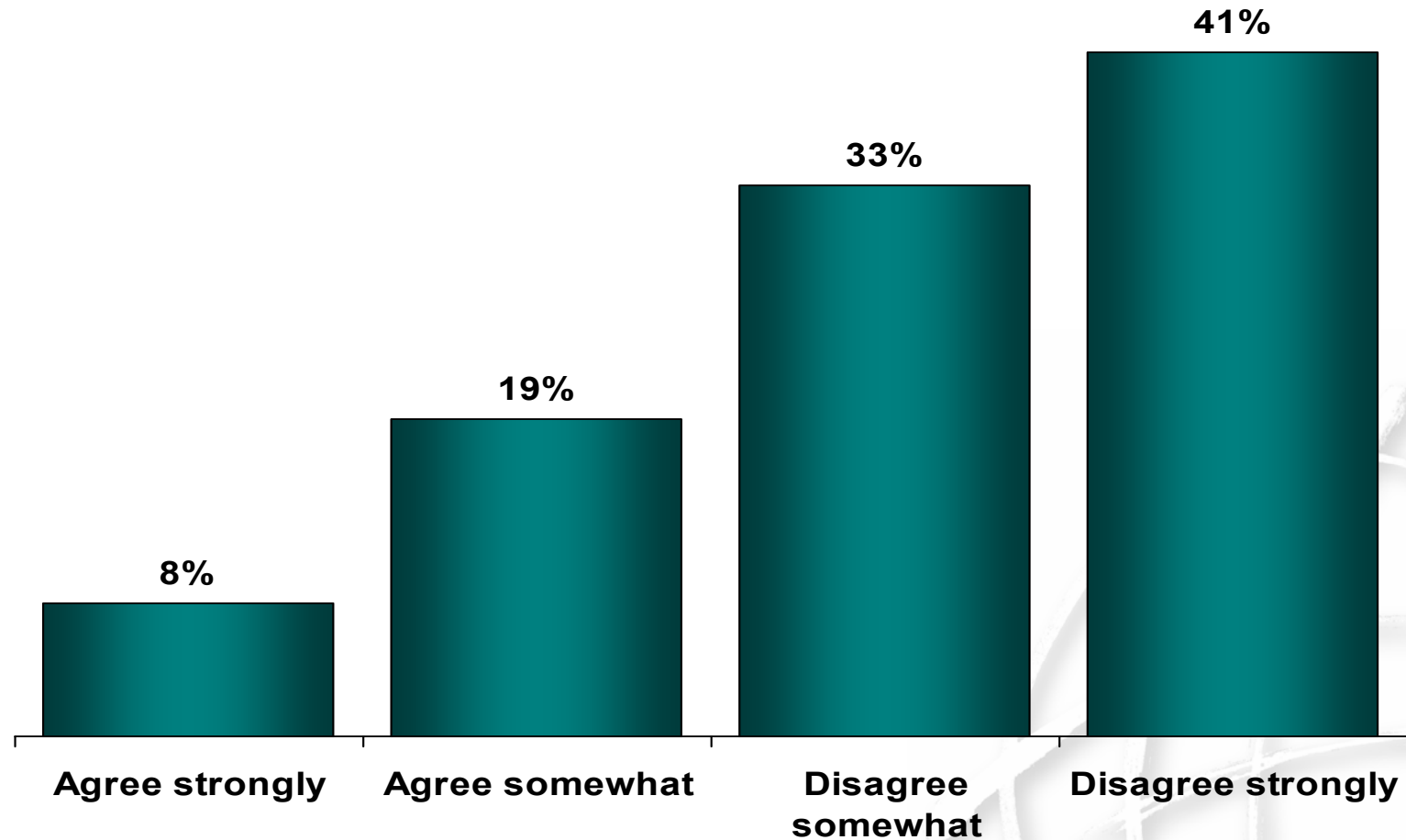


Six-in-10 (61%) Think The Main Cause of Climate Change Has Been the Effect of Man-Made Gases...Compared With 39% Who Say It's Due To Natural Warming and Cooling Patterns...

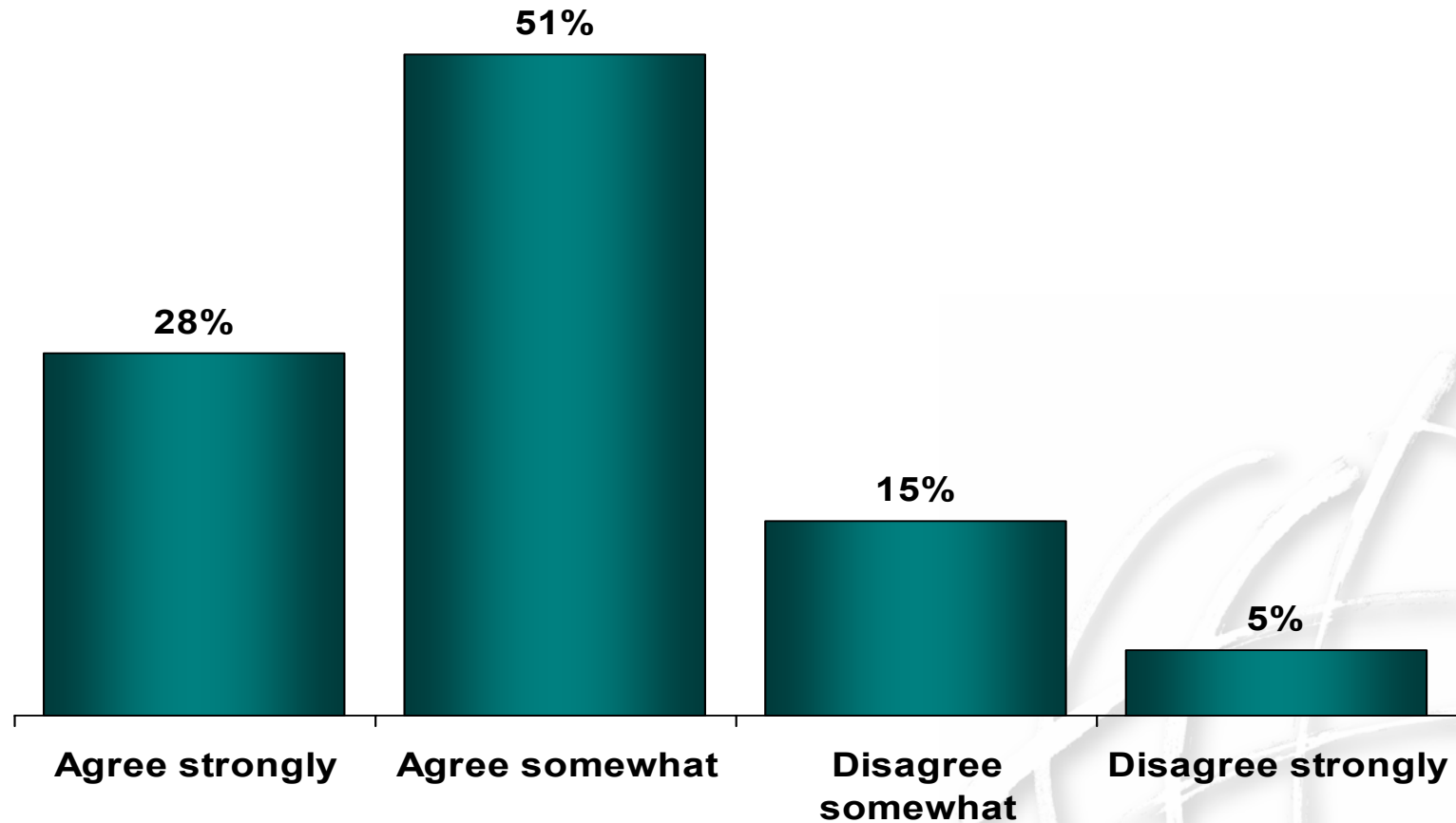


The effect of natural warming and cooling patterns that rise and fall over the course of centuries, one of which we are experiencing now, 39%

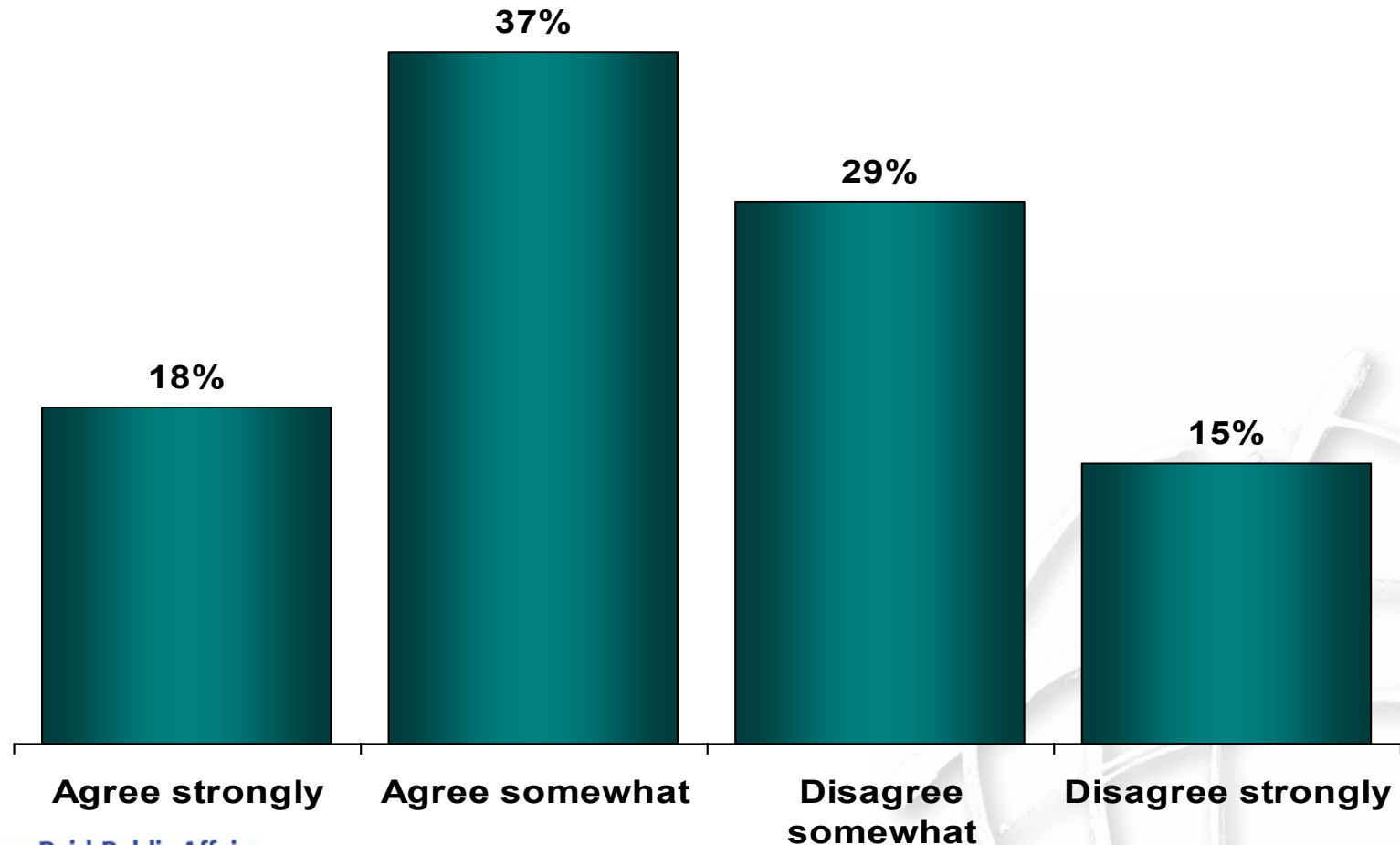
And While Only 41% Disagree Strongly That As A Country And Individually Not Much Can Be Done To Stop Climate Change...Half (52%--33% & 19%) Are Open To It To Some Degree...



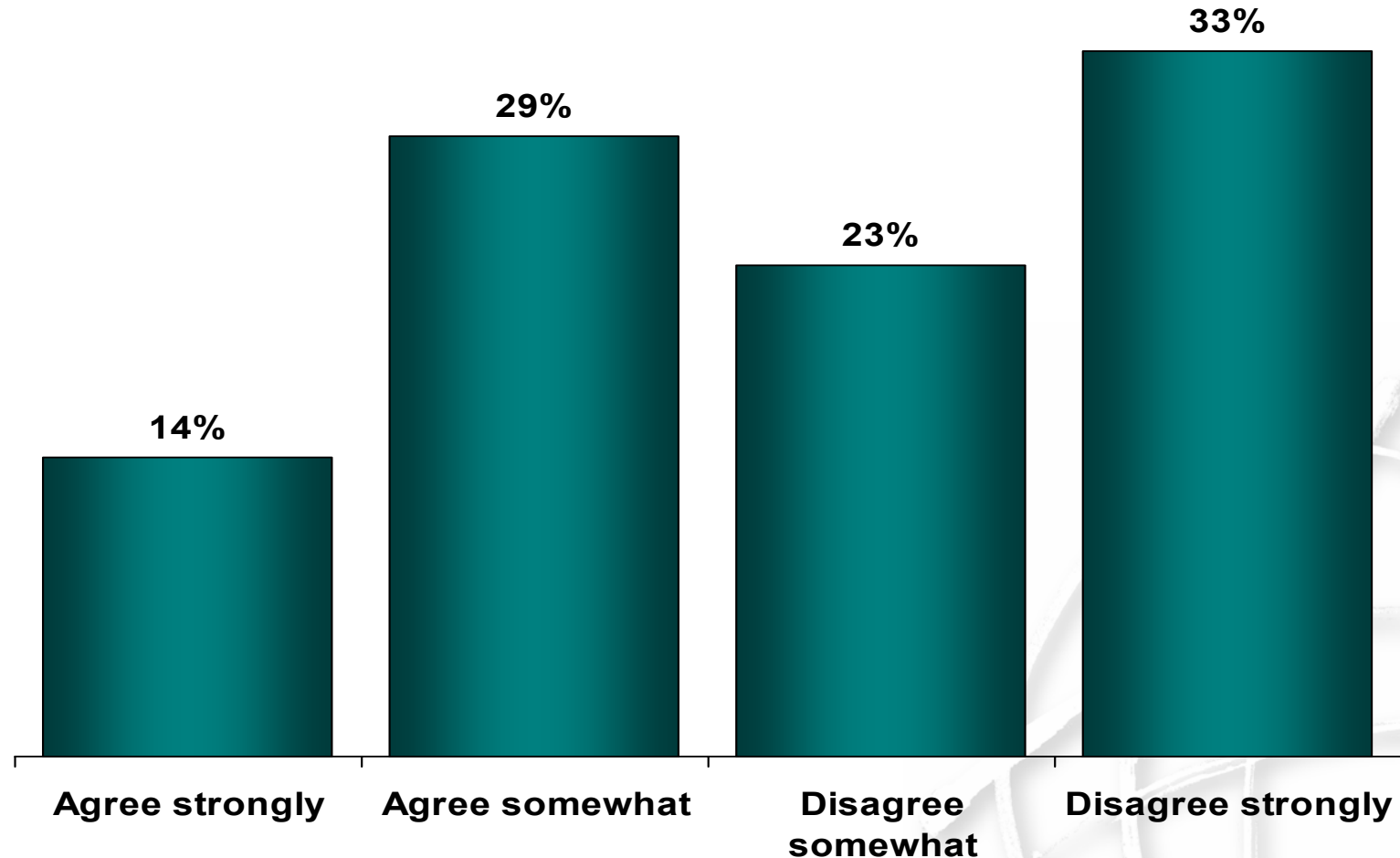
But Only 1 in 3 (28%) Say They're Willing to Make *Significant* Lifestyle Changes To Stop Climate Change... The Rest (71%), Not As Much...

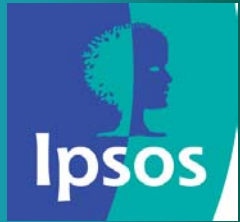


And Only 18% Truly Support That We *Must Do Everything We Can To Reduce Global Warming, Even If It May Cost Canadian 200,000 Jobs and \$16 Billion to Our Economy Over the Next Decade...* The Rest Need Convincing...

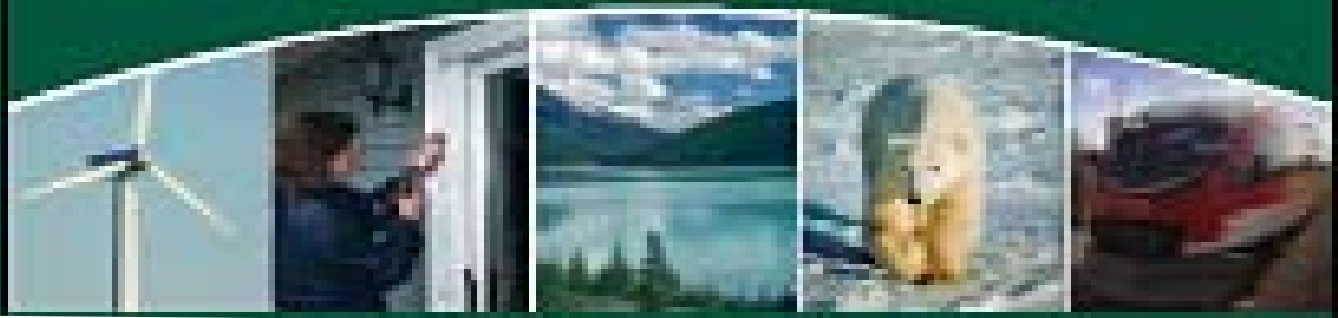


And Only 14% Appear Ready And Willing To Put Their Money Where Their Mouth Is With A \$100 Dedicated Greenhouse Reduction Tax... From 41% To 14% In 4 Slides...



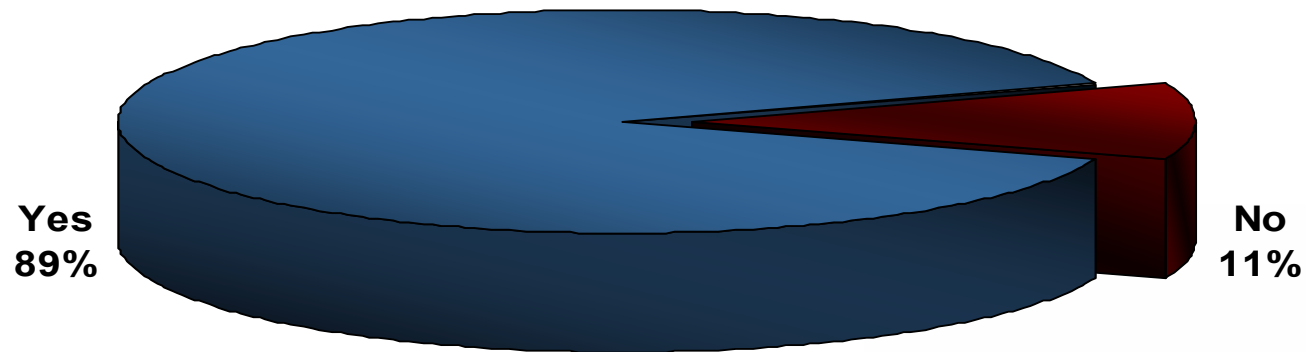


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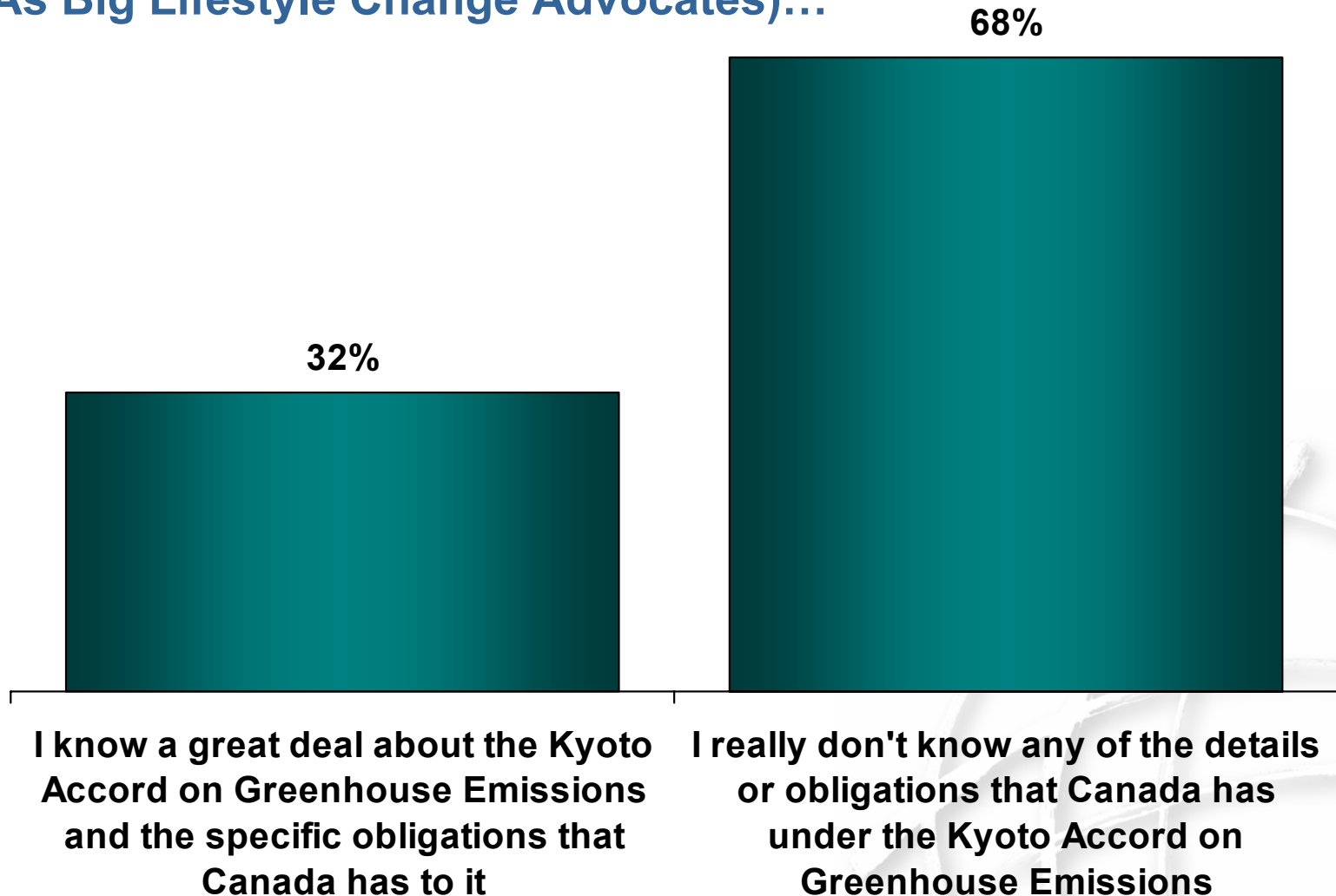
So Then, What Of Kyoto...And Of The New Government's Options?

Most Canadians (89%) Have Heard of the Kyoto Accord...

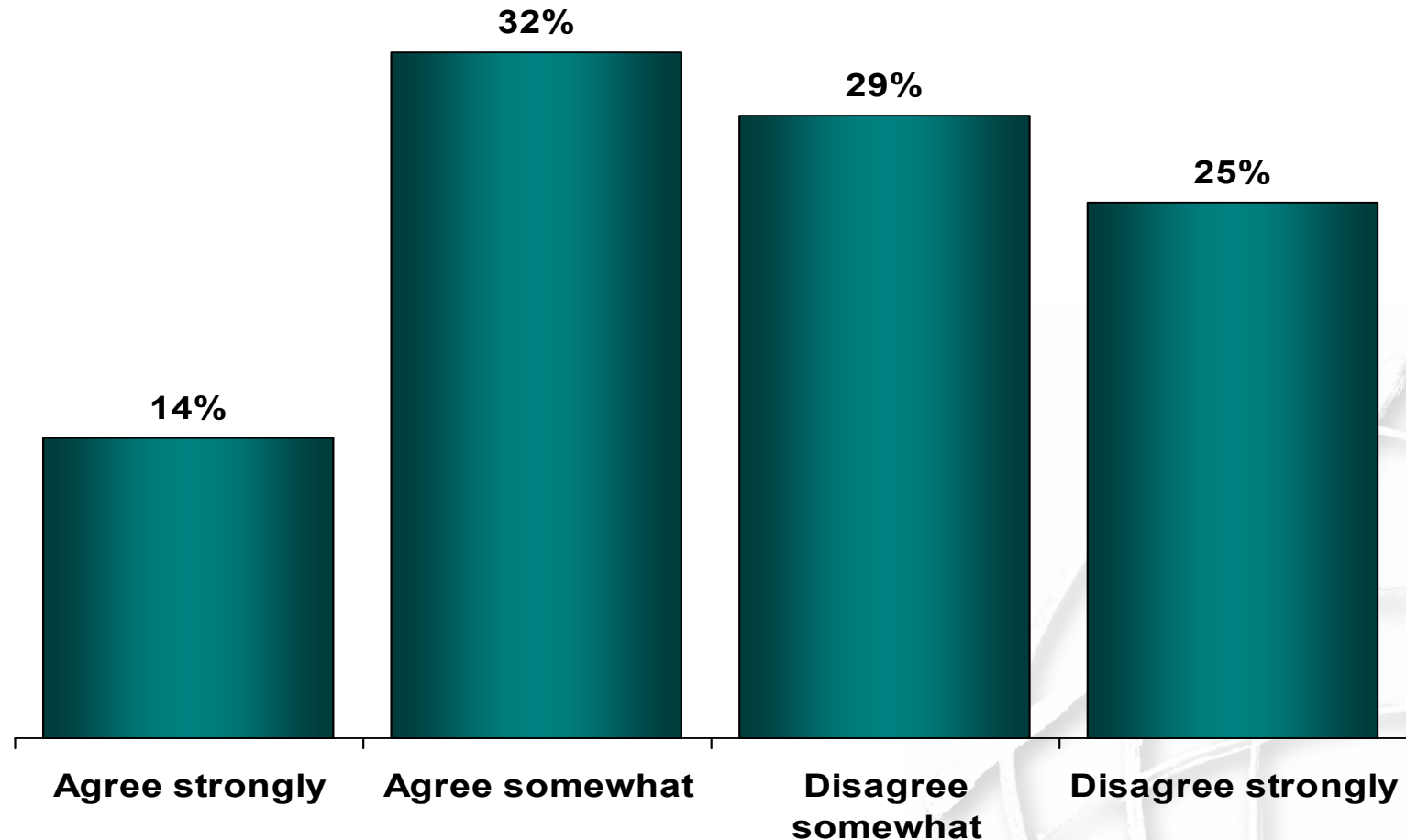


But 68% Say They Don't Know Any of the Details...

32% Say They Know a Great Deal (28% of All Canadians...Same As Big Lifestyle Change Advocates)...



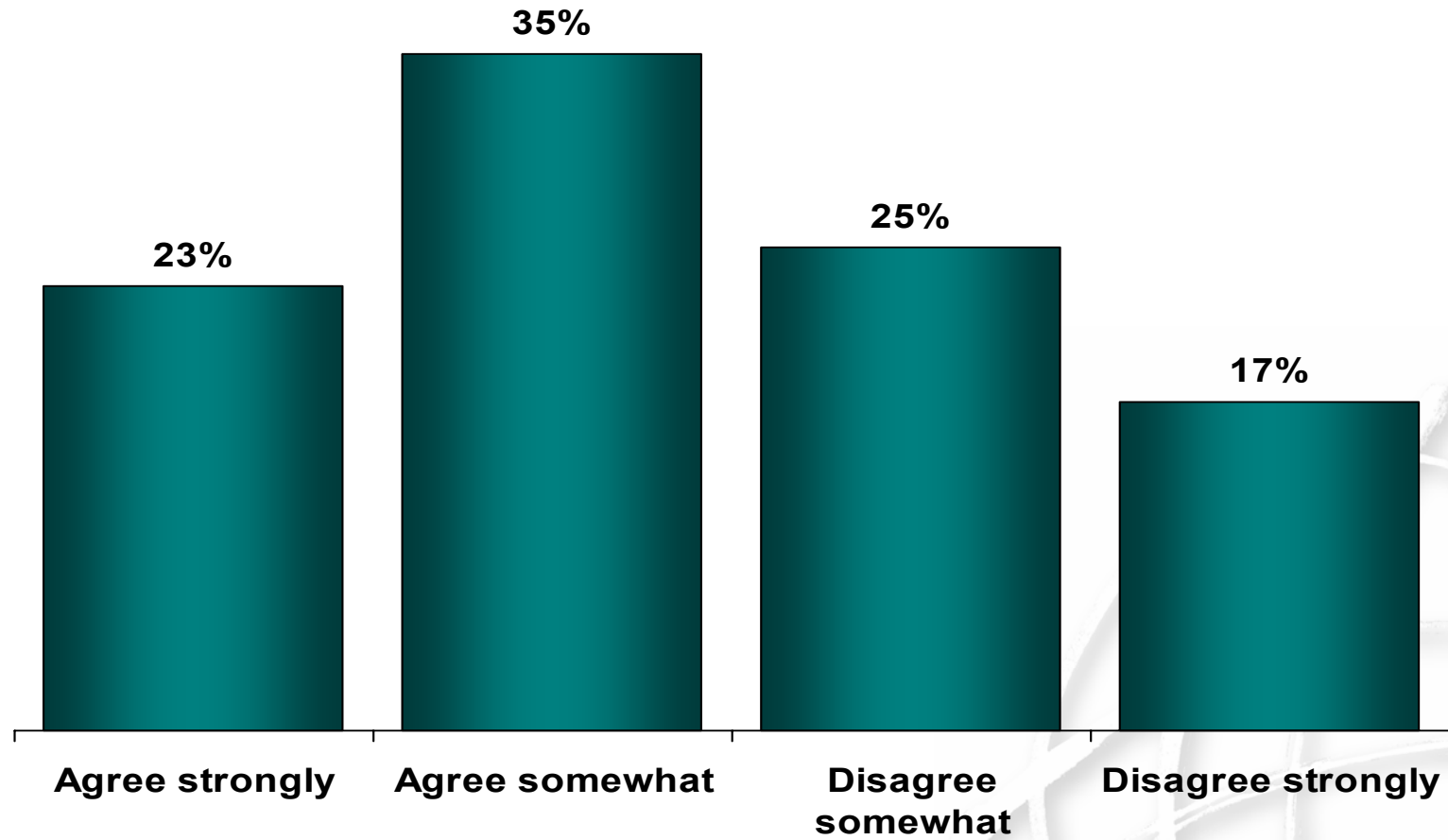
And While A Majority (54%) Say The New Conservative Government Should Not Abandon The Lower Emissions Targets Canada Won't Likely Reach And Implement What They *Think* is Realistic...

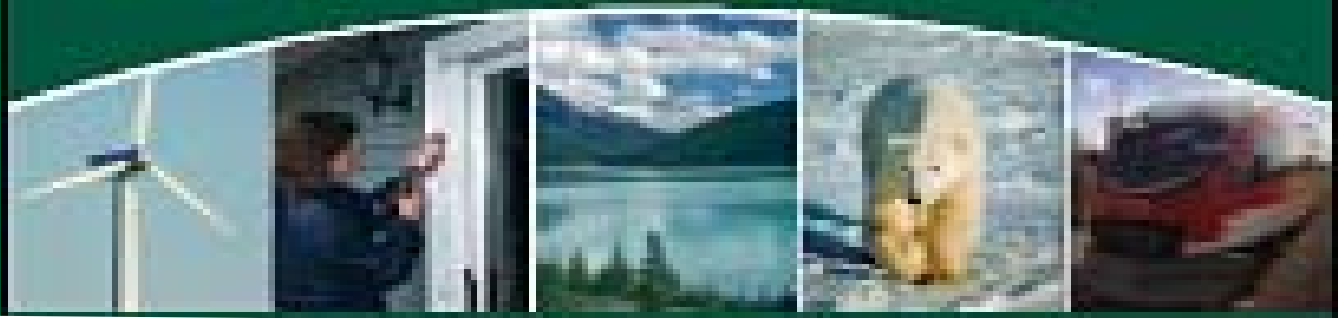
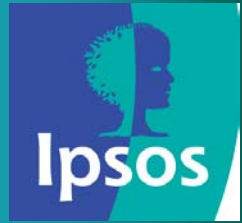


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Now, thinking about the issue of climate change, please indicate whether you agree or disagree with each of the following statements. "If Canada is not going to meet targets for lower greenhouse emissions, then the new Conservative government should abandon the targets and do what they think is realistic." Base: All respondents N=1621

They Are Willing To Give the New Government Some Latitude (58%) To Create Its Own Specific Initiatives For Dealing with Greenhouse Emissions and Clean Air...





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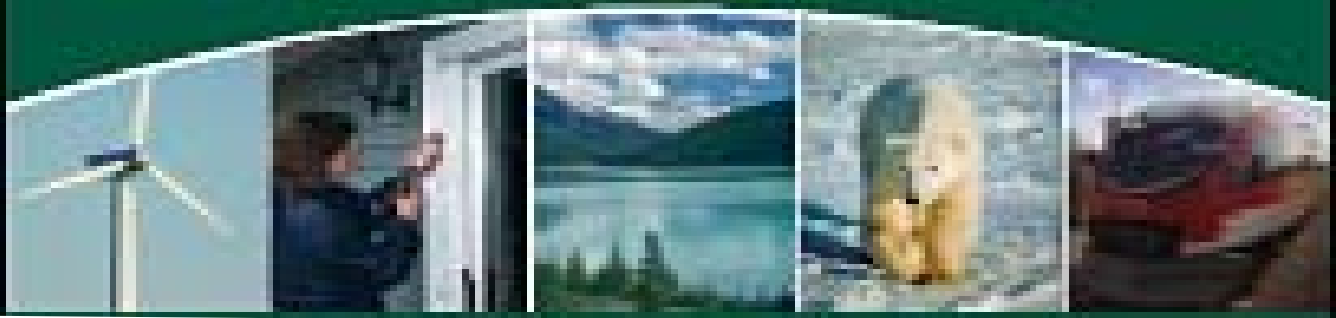
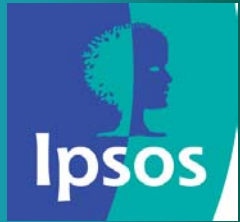
Conclusions...

Overall...

- The Environment Is Not A Prominent Issue [It Sits At 10% As The Most Important Issue...vs. Healthcare At 34%, Terrorism/National Security (21%), And Just After Education (13%)]...But It Is An Ingrained Issue...
- Having Looked At Public Opinion On The Environment Since 1990, Not much Has Really Changed Except There's More Pessimism Now...
- Canadians Say They Are Doing Their Part But The Issue May Just Be **Bigger** Than They Can Influence Or Impact...Warming Arctic Waters And Hurricanes Are Beyond Their Grasp...
- Even Their Perception of Sector Progress And Stewardship Is Marginal...And The Population "Segments" On The Environment Are Eerily Similar To A Decade Or More Ago...

Climate Change & Kyoto...

- **Concern Levels Have Stayed Constant Over Three Years On Climate Change...**
- **28% Are Really Environmentally Conscious And Committed To Wanting To Make A Difference On This Issue...But It Shrinks To 14% When The “Rubber Meets The Road”...**
- **Kyoto Is More of An *Environmental Concept Icon* Than A Known Commodity To Most Which Makes It Simultaneously Difficult To Abandon For Something Else Yet Malleable...**
- **The Political Reality: You Only Need Roughly 40% To get A Majority Government And This Is Not Going to Be A Key Ballot Item for Most...**



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John Wright, Senior Vice President

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