

The New Environmentalism

To say that the environment has become important to Canadians is akin to saying that Canadians are nice people. A continuous stream of media coverage, coupled with reams of public opinion research data, continues to remind us that the environment matters to Canadians. The most recent data collected by our firm, Harris/Decima, suggests that the level of environmental consciousness among Canadians continues to rise.

The environment has been rated as the most pressing public policy concern in Harris/Decima's national public opinion tracking research for five quarters in a row, and more than three quarters of the population say it is becoming more important to them in their day-to-day lives. It is fair to say that environmental engagement has now become mainstream public opinion.

Today, it actually isn't all that interesting for those of us in the public opinion business to say that the environment is becoming very important to Canadians. But there are many interesting and important questions that lie beneath the overall trend. Some of these questions include: What is behind the growing consumer attention to the environment? Is there evidence that the current focus on the environment is different than previous occasions where it became the "flavour of the month" and then faded? To what extent are changes in consumer behaviour following attitudinal trends, including those that impose higher costs on consumers? What are consumer expectations of businesses from an environmental perspective?

[more »](#)

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Harris/Decima has been actively seeking to learn more about these questions. Most recently, working in partnership with Canada Post, we completed a comprehensive quantitative and qualitative study of Canadian attitudes and behaviours in the environmental arena.

WHAT'S NEW ABOUT ENVIRONMENTALISM?

There are actually a number of trends at play in public opinion that help to shed light on the nature and character of public opinion on environmental issues today.

1. The first, most notable trend is **demographic** – that the preoccupation with the environment cuts across generations and gender, region, partisan lines and income groups. Unlike the past, where environmental movements were largely driven by idealistic young people, we observe that those of all ages, chief among them women (moms in their 30s and 40s in particular) and baby boomers have become very focused on these issues, often as focused in as young people continue to be. The aging baby boomer population is most notable in regard to the environment. We observe that this group is increasingly preoccupied with the legacy it will leave to their grandchildren and the earth. This population group, which in the past tended to pay less attention to environmental issues, now appears to have established a level of economic stability, allowing for more focus on other issues, such as the environment. In addition, because this group typically possesses economic wherewithal, their willingness to pay for more environmentally sound products and services is often greater than found among the younger people who have historically been environmental catalysts.

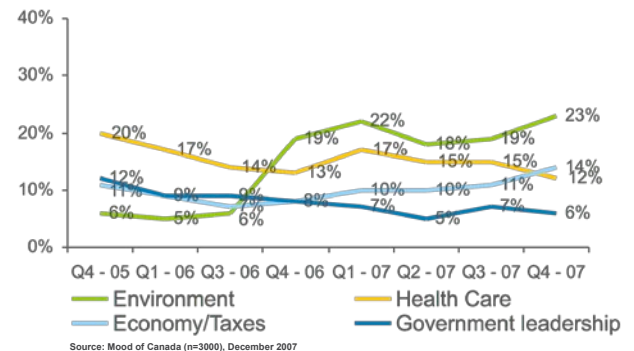
2. Concerns about **changing weather patterns** (with global warming as the cause) has been the most publicized factor that has catalyzed attention to these issues. Our research suggests that hurricane Katrina was the catalytic weather event that was the “tipping” point for the shift in public opinion in late 2006.

While subsequent attention has been driven by Al Gore and increased media attention, our belief is that it has become deeply embedded in Canadian public opinion because people are observing changes in their local weather and ecosystems that they ascribe to environmental factors. One of the best Canadian examples is in northern BC, where communities like Prince George have observed winter temperatures rise markedly over the past decade, allowing for the continued spread of the mountain pine beetle, and the subsequent decimation of BC's lodgepole pine stands.

3. Our research indicates that global warming has been a catalyst for environmental concern. But in truth, Canadians tell us that it is a symptom of the problem, rather than the problem itself.

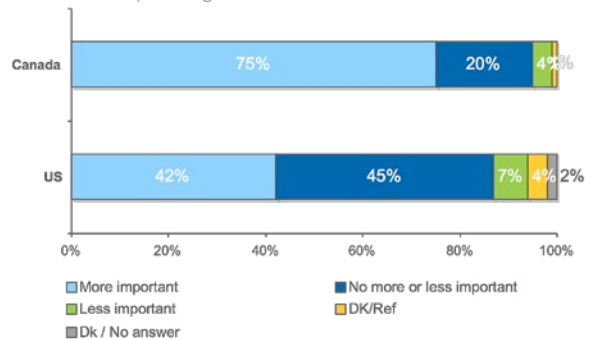
At its root, the true problem that many Canadians point to when they talk about environmental degradation is that **society is unnecessarily wasteful** of the earth's resources. Climate change, landfill overuse, water/air pollution, and smog

MOST IMPORTANT ISSUE FACING CANADA



IMPORTANCE OF ENVIRONMENTAL CONSERVATION AND PRESERVATION

Would you say that environmental conservation and preservation is something that is becoming more important to you personally, less important, or no more or less important than it was a few years ago?



are all symptoms of the problem of wastefulness. Garbage is actually rated as the most pressing environmental concern. Climate change is the highest profile symptom, but to most, it is a symptom of the larger problem of waste, one that is becoming more urgent.

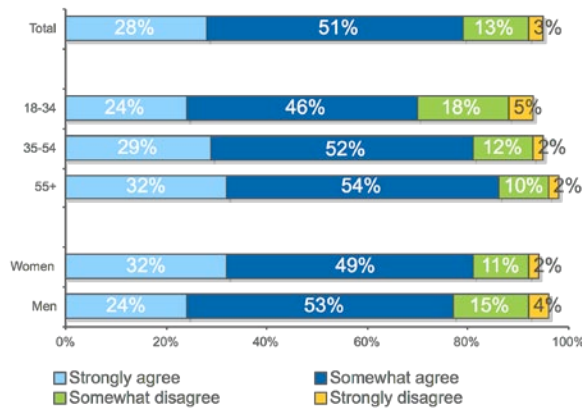
4. The final key factor that is involved in driving these trends is **high energy prices**, and consumer interest in reducing expenditure on energy. Increased attention to energy costs in general has served as an important catalyst for change. Saving energy, whether for home heating, air conditioning, or fuel for vehicles, yields ancillary environmental benefits.

This confluence of circumstances found in the research suggests that the focus on the environment has staying power. How fast change will occur, and how far it will go, remains an open question. But so many of these underlying factors point toward this trend continuing that it strikes us that this is not a passing phase, but a new reality, and that consumers are coming to terms with this new reality, sometimes faster than businesses appear to be.

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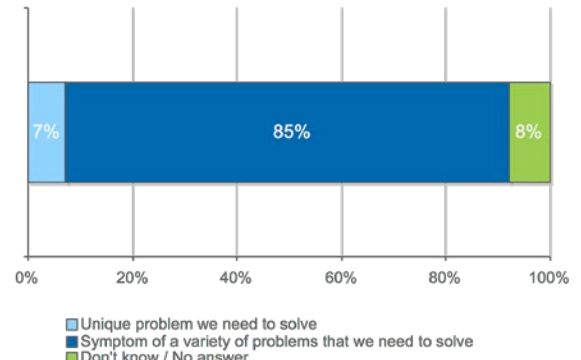
MY CONCERN IS ENVIRONMENTAL LEGACY

Do you strongly agree, agree, disagree or strongly disagree with the following statement: **My concern about the environment is really about the legacy we leave for future generations.**



CLIMATE CHANGE – UNIQUE PROBLEM OR SYMPTOM?

When you think about the issue of climate change, do you see it more as a unique environmental problem that we need to solve, or a symptom of a variety of environmental problems that we need to solve?



WHAT ARE CONSUMERS DOING ABOUT IT?

How does this increased attention on environmental issues manifest itself at the level of the average consumer?

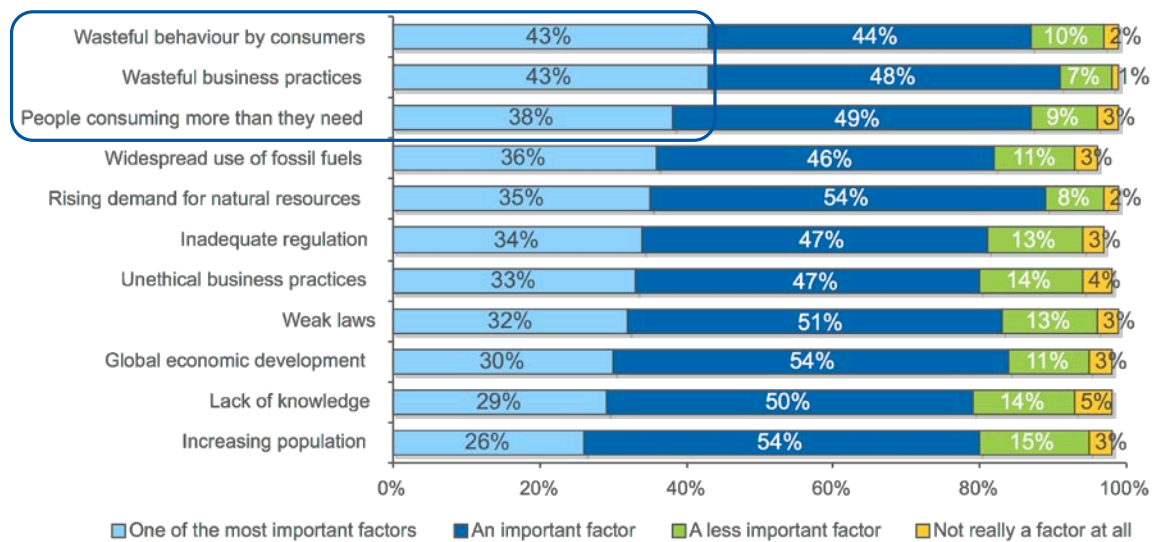
One of the manifestations is that many people are spending more time thinking about the environmental impacts of their daily choices.

From disposing garbage to setting the thermostat to reviewing mail and catalogues, people are thinking about the environmental impacts of their actions. More than 80 per cent of participants in our study said they always or

often think about the environmental impact when they dispose of or recycle household trash. And more than 60 per cent said they always or often think about the environmental impact of mail and catalogues.

WHAT'S CAUSING ENVIRONMENTAL ISSUES?

To what extent do the following contribute to environmental problems that concern you?



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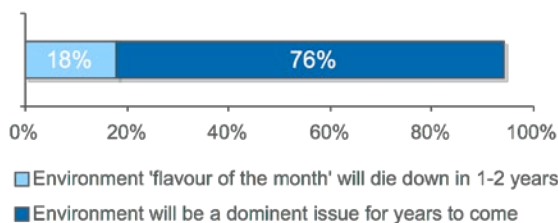
Indeed, the data shows that there is concern about the environmental impact of mail and catalogues, that rivals the level of concern associated with a number of other actions like driving, using water and electricity, disposing trash.

Focus group research helps to illuminate this seeming contradiction: people indicate that concerns about mail may be less pressing than some other environmental concerns, but people believe that core principle that environmental progress is important to make in all areas, and given the volume of paper that is utilized for mail, efforts to reduce wastefulness are important to pursue.

THE STAYING POWER OF ENVIRONMENTAL ISSUES

Which of the following views is closest to your own?

I think the environment is a bit of a "flavour of the month" and will die down as an issue over the next year or two OR I think the environment has risen to a new level of Consciousness with Canadians that means it will continue to be a dominant issue for many years?



Source: Harris/Decima's New Environmentalism (February/March 2008)

BEHAVIOUR CHANGE

So what steps are people taking to make more environmentally friendly choices, and what steps do people say they are willing to take in the future?

The most frequently cited step that consumers are taking in their households involves being more conscious about waste and garbage, most often taking more steps to recycle paper and other products. As might be expected, these areas, which constitute the "low hanging fruit" for environmental action, are taken first.

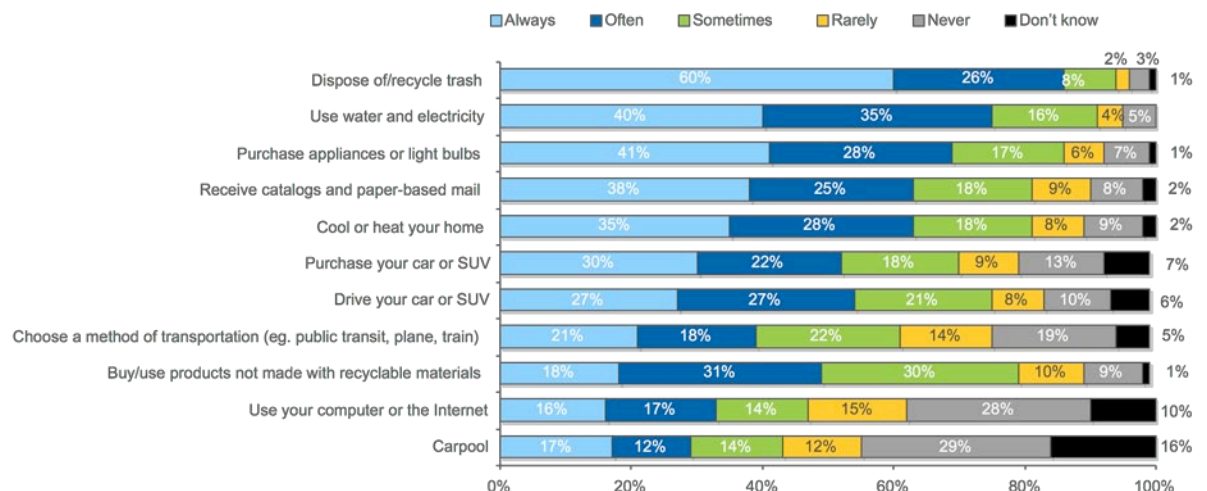
What is more striking is a widespread sense that more steps will have to take place, in a range of areas, in order to achieve a greater balance of sustainability. While people tend to take the easiest steps first, most are not under the assumption that the steps they have taken will be enough.

When individual Canadians talk about environmental engagement, their frame of reference is foremost about personal empowerment how people in the context of their own lives, in their own households, in their own backyards have been and will be taking steps to help address environmental concerns. It is the part of the environmental equation that they can control, so they gravitate toward those kinds of activities.

In addition, there is an evident sense of collective interest, and collective effort, that people recognize is required to make change happen on environmental issues. People are increasingly of a view that they, as well as their neighbours, businesses, and governments, all have to make changes in order to be more environmentally conscious. In the survey, more than 80% of participants said that they, industry, and government were all equally responsible to address environmental concerns.

CONSIDER ENVIRONMENTAL IMPACTS

When you do the following things, do you consider the environmental impact of those actions always, often, sometimes, rarely or never?



Source: Canada Post Impact of Direct Mail on the Environment Research CP#08-214 (March 2008)
Q3. Base: All respondents (n=1029)

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The concept that consumers won't make changes because others aren't doing their part, is less a part of the mind-set that most Canadians believe in regard to these issues as it may have been in the past, when there was more of a tendency to point to "businesses" or "others" that needed to take steps before they would.

Environmentalism in Practice Today

Please indicate whether or not you already undertake these actions	I already do this	I do not do this
Recycle the paper you use	91%	7%
Reduce the amount of electricity you use	90%	7%
Recycle the plastic you use	88%	9%
Reduce the temperature you heat your house to in the winter	86%	10%
Reduce the amount of garbage you produce that goes to landfill	85%	11%
Reduce the amount of water you use	81%	16%
Improve the energy efficiency of your home	78%	14%
Reduce your use of pesticides	78%	11%
Limit your use of air conditioning in the summer	78%	15%
Reduce the amount you drive	70%	24%
Give preference to more eco-friendly transportation modes	59%	34%
Purchase a more fuel efficient car	44%	39%
Reduce the use of airplanes for business and vacation	42%	39%
Buy paper products that come from sustainably managed forests	33%	38%
Buy wood products that come from sustainably managed forests	23%	40%

Source: Harris/Decima New Environmentalism Syndicated Study Wave 1 (Summer 2007)

WILL CONSUMERS PAY MORE FOR ENVIRONMENTALLY FRIENDLY PRODUCTS?

Many observers have raised the question of whether consumers are truly prepared to make environmentally friendly choices when those choices cost them more money.

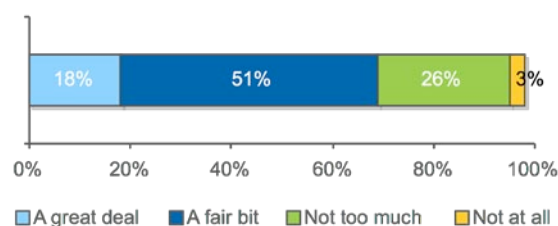
Our research suggests that in many areas, **consumers are prepared to pay more for environmentally friendly products or services, as long as those costs are deemed reasonable.**

Consumers indicate that they will continue to be willing to make these choices, for reasons that go beyond "doing the right thing"; the economics of making these choices is changing. Three key economic factors that our research suggests will continue to spur environmental behaviour change:

- » The cost of making environmentally friendly choices is falling. Consumers tell us that environmentally friendly versions of products are typically 10-20 per cent more than less environmentally friendly versions. For most, particularly the baby boomers who are concerned with their legacy and have more disposable income, paying 10% more for many products does not seem like too high a price to pay to make these choices.
- » The availability of environmentally friendly choices is expanding. There are now environmentally friendly substitutes available in a wide range of product areas, from appliances, to hardware to groceries.
- » A growing recognition that the amortized costs of environmental choices can end up being an economic benefit to the consumer. When consumers think about bigger-ticket products that have environmental benefits, like high efficiency furnaces, hybrid cars, and home insulation, instead of instinctively being pushed back by the sticker price of such purchases, many are employing an economic calculus that involves consideration of the long-term savings that those choices might yield.

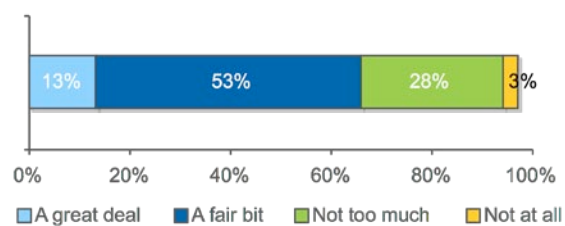
PERSONAL ABILITY AND WILLINGNESS TO REDUCE EMISSIONS

Over the coming years, how much do you feel you could change your life to reduce the amount of greenhouse gases you produce, a great deal, a fair bit, not too much, not at all?



Source: Harris/Decima New Environmentalism Syndicated Study Wave 2 (Fall 2007)

Over the coming years, how much do you feel you will change your life to reduce the amount of greenhouse gases you produce, a great deal, a fair bit, not too much, not at all?



Source: Harris/Decima New Environmentalism Syndicated Study Wave 2 (Fall 2007)

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DECISION-MAKING DRIVERS

In spite of these emerging realities, it is important to recognize that today, in different areas of daily life that have an environmental impact, a different mix of drivers influence ultimate household choices. In some areas, environmental considerations are prime factors in decisions, and in others, they are secondary to other factors.

Typically, the most powerful drivers of household choices are three-fold:

- » **Costs**
- » **Convenience**
- » **Environmental** considerations (or an "environmental ethic")

In several areas of daily life, such as the purchase of appliances, environmental considerations are prime in affecting decisions. In others, such as choices of mode and frequency of transportation, convenience trumps other considerations. For cooling/heating home, all three play a role, but cost often dominates these decisions.

PAPER AS AN ENVIRONMENTAL CONCERN

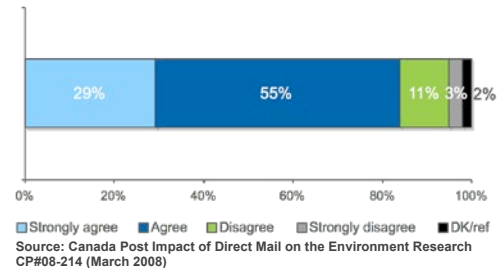
As discussed earlier, most Canadians think the vast majority of advertising and promotional mail that goes to households ends up in recycling.

Nonetheless, paper in general, and mail in particular, are a reference point for environmental concerns in both households and businesses. Among consumers and businesses alike, paper use/waste was almost always cited as an example of something that they see as a problem, and it was seen as being a fairly significant problem in relation to other environmental concerns, because it is something they come across every day. In particular, many of the businesses we have interviewed suggested that not enough effort is being made by their company to recycle paper.

The paper products industry has become increasingly focused on the production of recycled paper, and the volume of recycled paper as well as recovery of paper continues to

PERCEPTIONS ON COMPANIES' BEHAVIOUR IN REDUCING ENVIRONMENTAL IMPACT

Do you strongly agree, agree, disagree or strongly disagree with the following statement: "I expect companies to change their behaviour significantly in order to reduce their environmental impact, even if it means products might cost more."



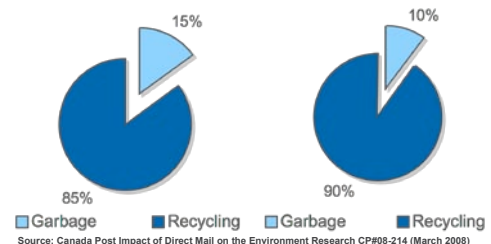
grow rapidly in Canada. It is one of the very positive stories in the environmental realm, among the many negative stories Canadians see and hear so regularly.

This data, as well as the data in our survey about paper going to waste, suggests that there remains opportunity for progress in the area of recovery and recycling of paper. Canada has made great progress over the past two decades, but more can be done by both consumers and businesses to move toward 100% recycling of paper products.

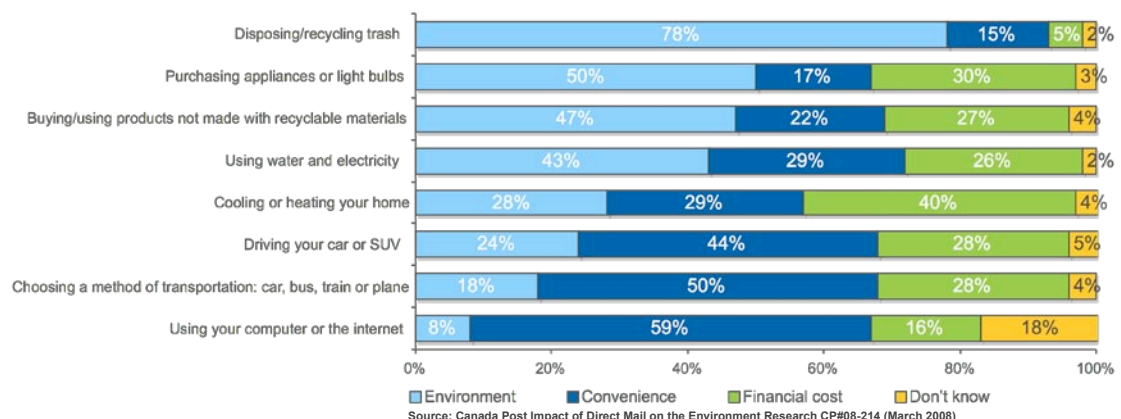
GARBAGE VS. RECYCLING

In your household, once *advertising or promotional mail* and catalogues are reviewed, what percentage would go into the garbage, and what percentage would go into recycling?

In your household, once *newspapers* are reviewed, what percentage would go into the garbage, and what percentage would go into recycling?



DECISION DRIVERS – ENVIRONMENT, CONVENIENCE, COST Among the environment, convenience or the financial cost to you, what do you consider first in when you make decisions about the following activities?



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CONSUMER EXPECTATIONS OF BUSINESSES

What are Canadian expectations of businesses when it comes to the environment? What are expectations of Canada Post?

The data suggests that consumers are increasing their expectations of businesses.

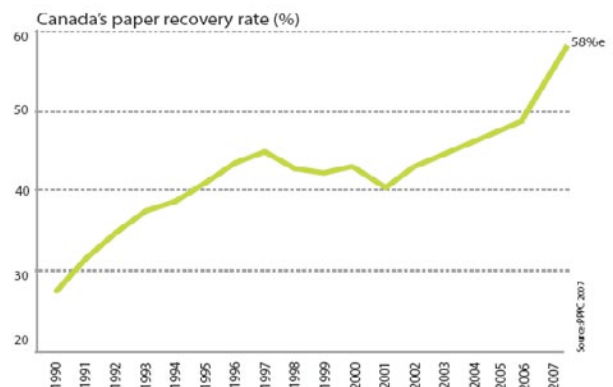
The point of departure is that they want businesses to be equal partners in the effort to reduce waste and be more environmentally conscious. As data earlier in this summary showed, Canadians see the effort as necessarily a collaboration of consumer, business, and government.

In specific terms, consumers tell us they want two main things from business. First, they want business to take care of their own backyard, just as they are trying to take care of their household's backyard. Second, they want products made available that have environmental credentials, ideally those that are independently verified. The public is increasingly sensitive to "greenwashing," which is a phrase media use to refer to organizations that make self-congratulatory or questionable environmental claims that are not true or stretch the truth significantly. Independent verification of effort helps to allay those concerns.

In short, consumers are looking for demonstrable, verifiable environmental progress from businesses. They want companies to make commitments that they can meet, and then exceed, starting in their own backyards, in their own business processes and practices.

While there has been progress in the area of paper recycling and recovery rates, the research suggests that there remains broad consumer hope that innovative solutions can reduce the environmental impact of paper. Most believe that progress will derive from a combination of technology, creativity, and commitment on behalf of business leaders, that will yield solutions that will reduce waste, reducing environmental degradation, and improving the quality of life of the next generation of Canadians.

Canada's Paper Recovery Rate (PPPC, 2007)



CANADA POST'S ENVIRONMENTAL COMMITMENT

- » Canada Post's first Corporate Social Responsibility (CSR) report and an overview of the corporation's key environmental initiatives can be found at canadapost.ca/csr.
- » In addition, a new resource Canada Post has launched, is an environmental micro-site, www.canadapost.ca/green (for English) and www.postescanada.ca/vert (for French), which contains green tips and best practices for consumers, mailers and suppliers.

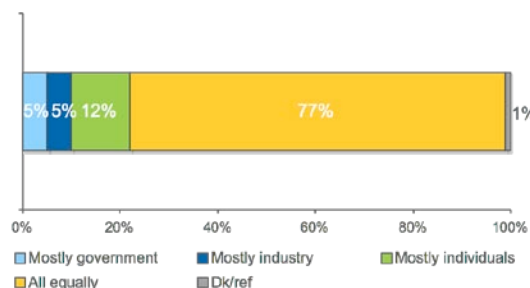
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INDUSTRY, GOVERNMENT AND INDIVIDUAL RESPONSIBILITY

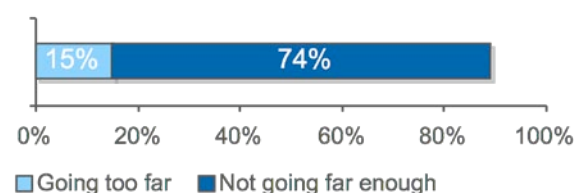
When you think about how to address environmental issues, do you view the responsibility as being mostly up to government, up to industry, up to individuals, or up to them all equally?



Source: Canada Post Impact of Direct Mail on the Environment Research CP#08-214 (March 2008)

HAS ENVIRONMENTALISM GONE TOO FAR?

Which of the following views is closest to your own? The current focus on environment is going too far, OR not far enough?



Source: Harris/Decima's New Environmentalism (February/March 2008)