

Innovative Research Group, Inc.
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Toronto :: Vancouver



Public Opinion Research ▶▶

Will Canadians Pay for Their Good Intentions



April Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from **April 8th to 12th, 2016**.
- This online survey of **2,383** Canadian adults was conducted on INNOVATIVE's Canada 20/20 national panel.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to n=2,000 to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey and panel members can only complete a particular survey once.
- Since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.

Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

April Regions: Where did respondents come from?

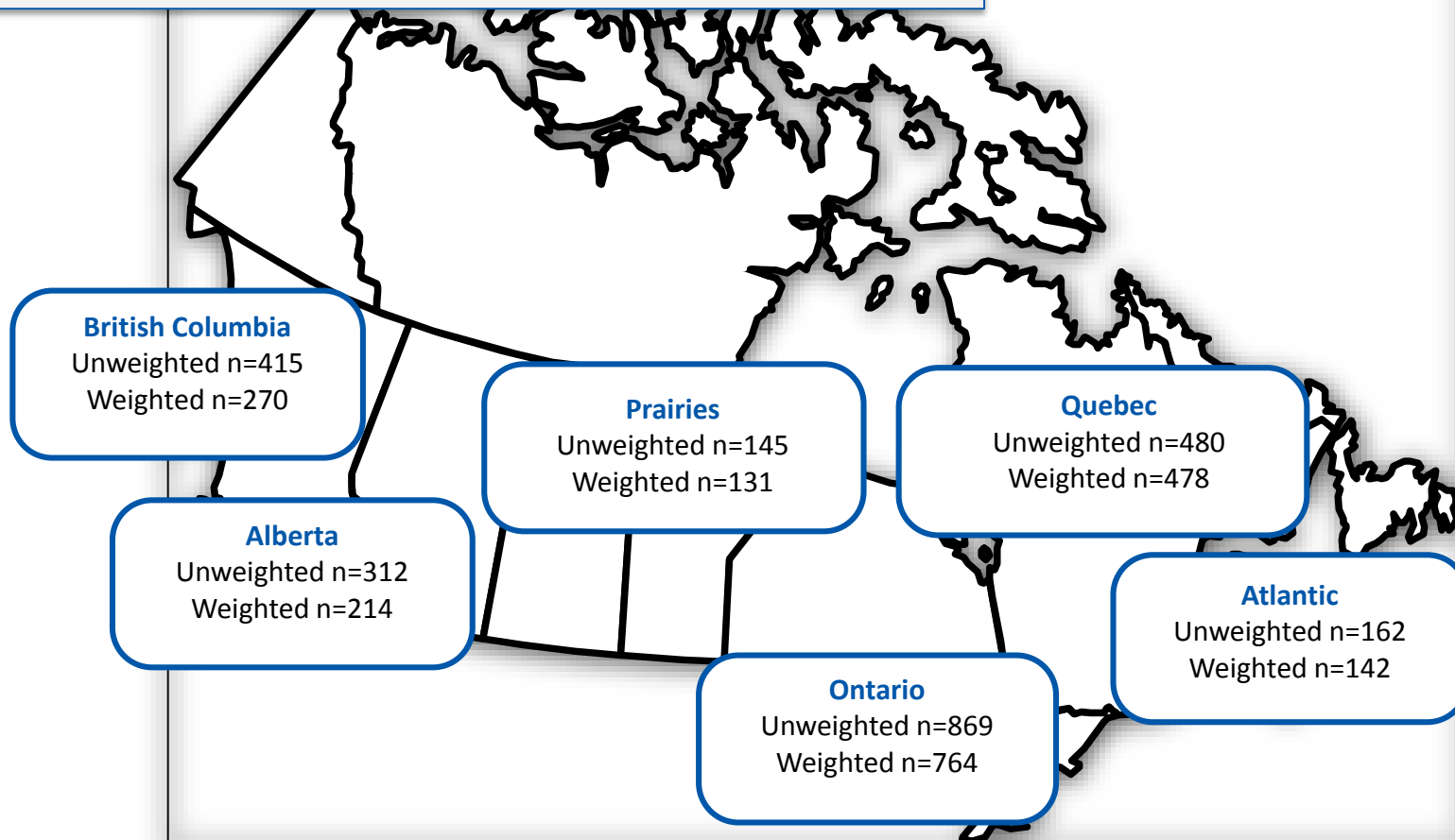
Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

National

Unweighted n=2,383

Weighted n=2,000



December Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from December 11th to December 17th, 2015.
- This online survey of 3,055 adult Canadians was conducted on INNOVATIVE's Canada 20/20 national research panel. The results are weighted to n=2,000 based on Census data from Statistics Canada. Tracking results are drawn from previous CTM studies.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once.
- In accordance with the MRIA, margins of error are not calculable for online samples, but an unweighted probability sample the size of the weighted national sample (n=2,000) would have an estimated margin of sampling error of ± 2.21 percentage points, 19 times out of 20.

Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

December Regions: Where did respondents come from?

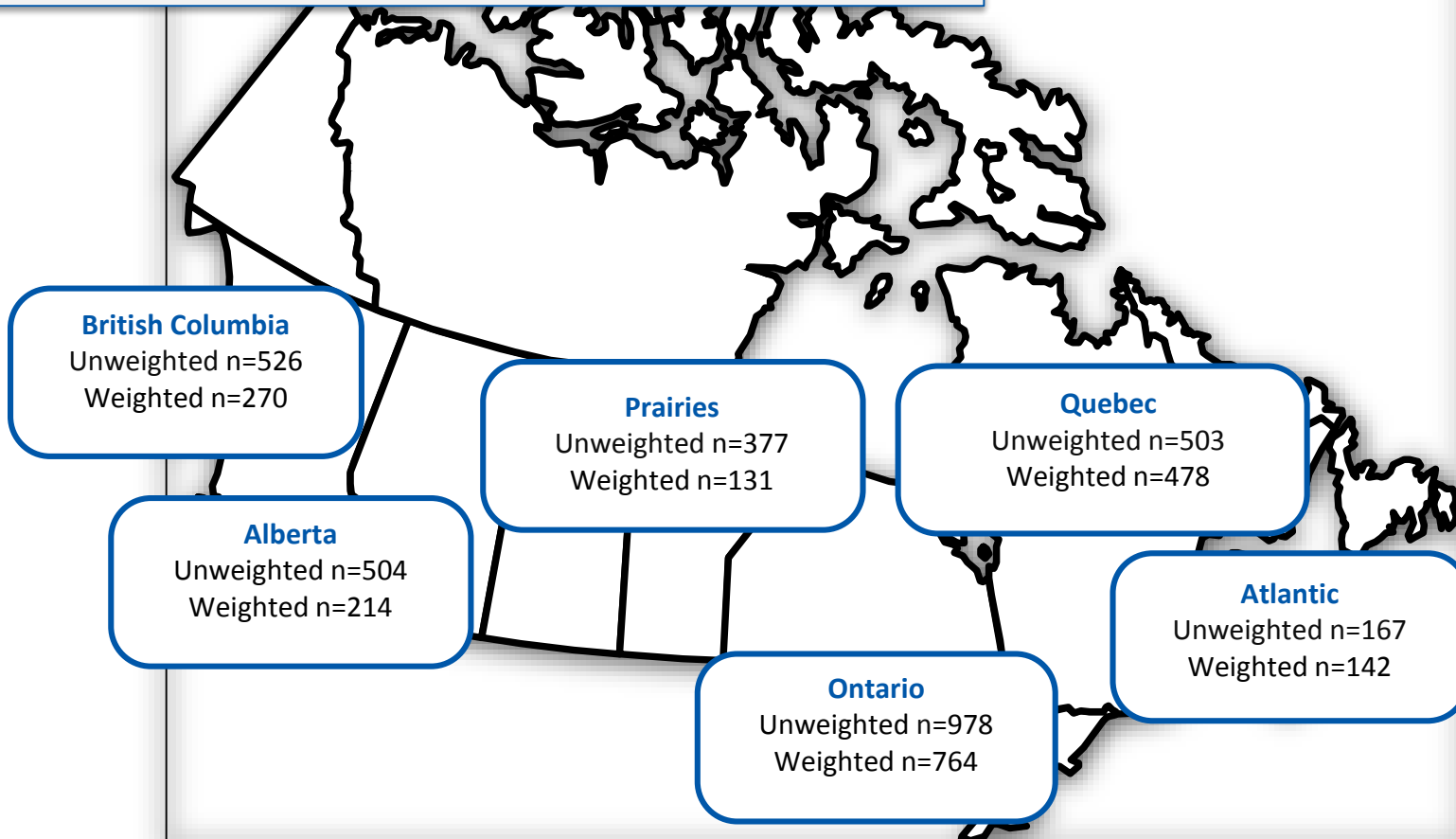
Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

National

Unweighted n=3,055

Weighted n=2,000



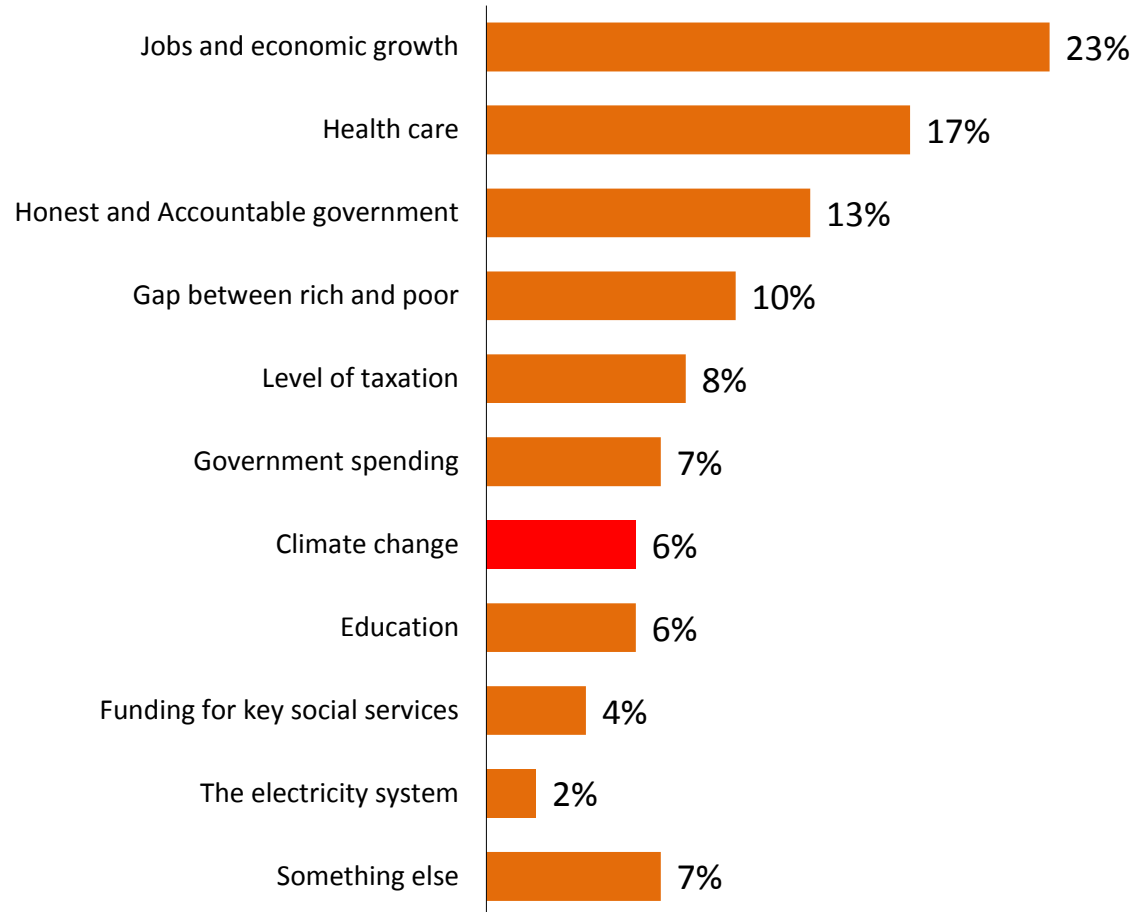
Climate Change Context - April

As an issue, climate change is not a top priority

Q

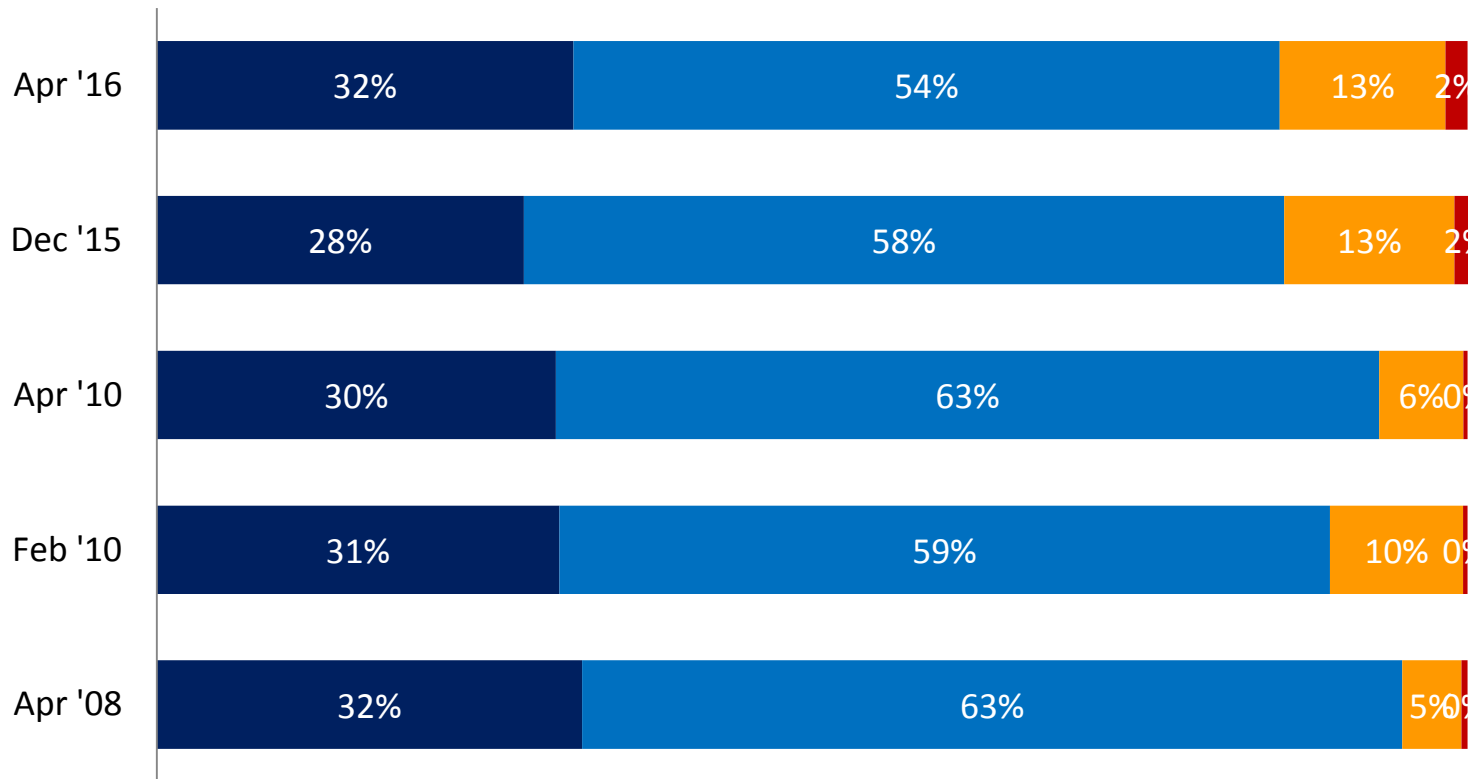
Looking at the list of provincial issues below, which is the most important issue to you?

[asked of all respondents]



Familiarity with CC: marginal improvement in the depth of understanding of climate change over last December

Q How familiar are you with the concept of climate change?
[asked of all respondents]



- You have a detailed understanding of climate change
- You have a general understanding of climate change but don't know the details
- You have heard of climate change but don't know much about it
- You haven't heard of climate change before this survey

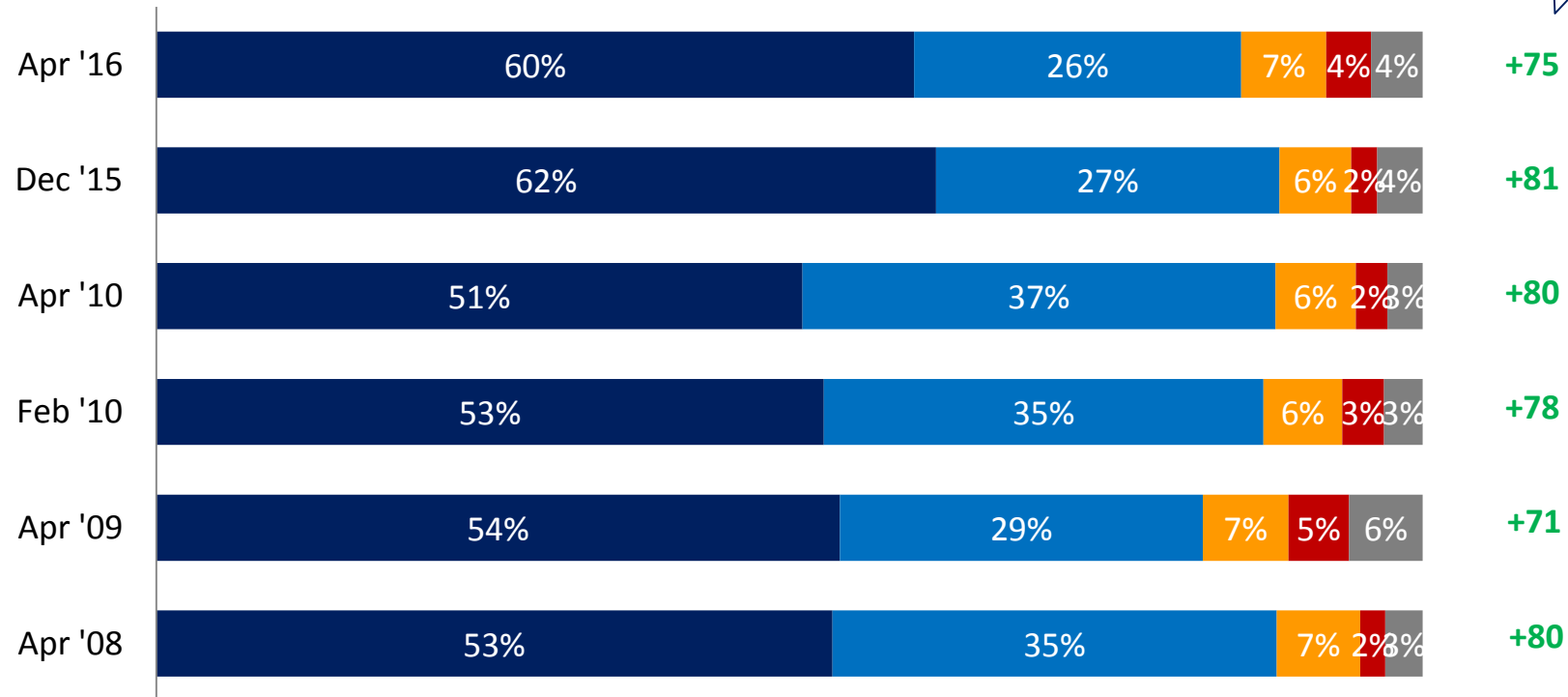


NOTE: Prior to 2010, the term “global warming” was used in place of “climate change”

Belief in CC: while belief in climate change is still high, net belief is down 6 points since December 2015

Q Thinking about your own personal view, do you believe that...?
[asked of those who have heard of climate change; n=1,966]

Net
Occurring



- Climate change is definitely occurring
- Climate change is probably occurring
- Climate change is probably not occurring
- Climate change is definitely not occurring
- Don't know

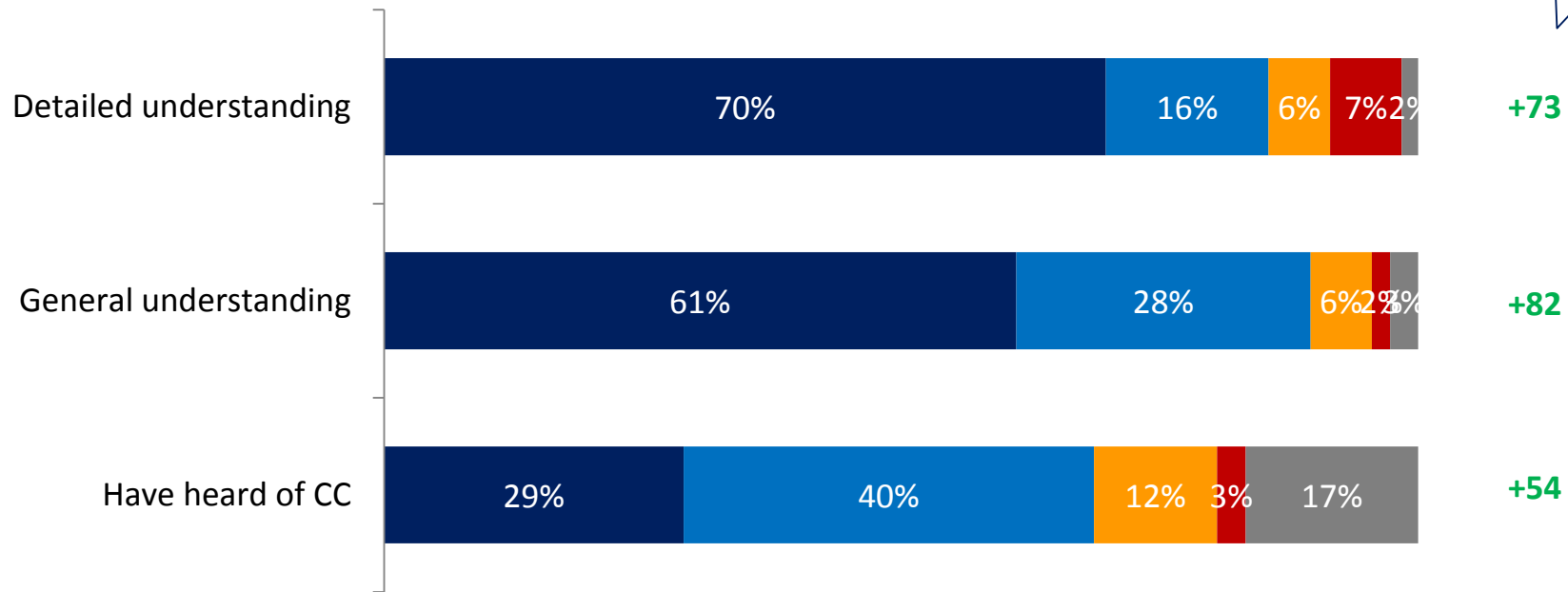


NOTE: Prior to 2010, the term “global warming” was used in place of “climate change”

Belief by Familiarity: intensity in belief that climate change is occurring increases with level of understanding

Q How familiar are you with the concept of climate change?
 AND
 Thinking about your own personal view, do you believe that...?
 [asked of those who have heard of climate change; n=1,966]

**Net
 Occurring**



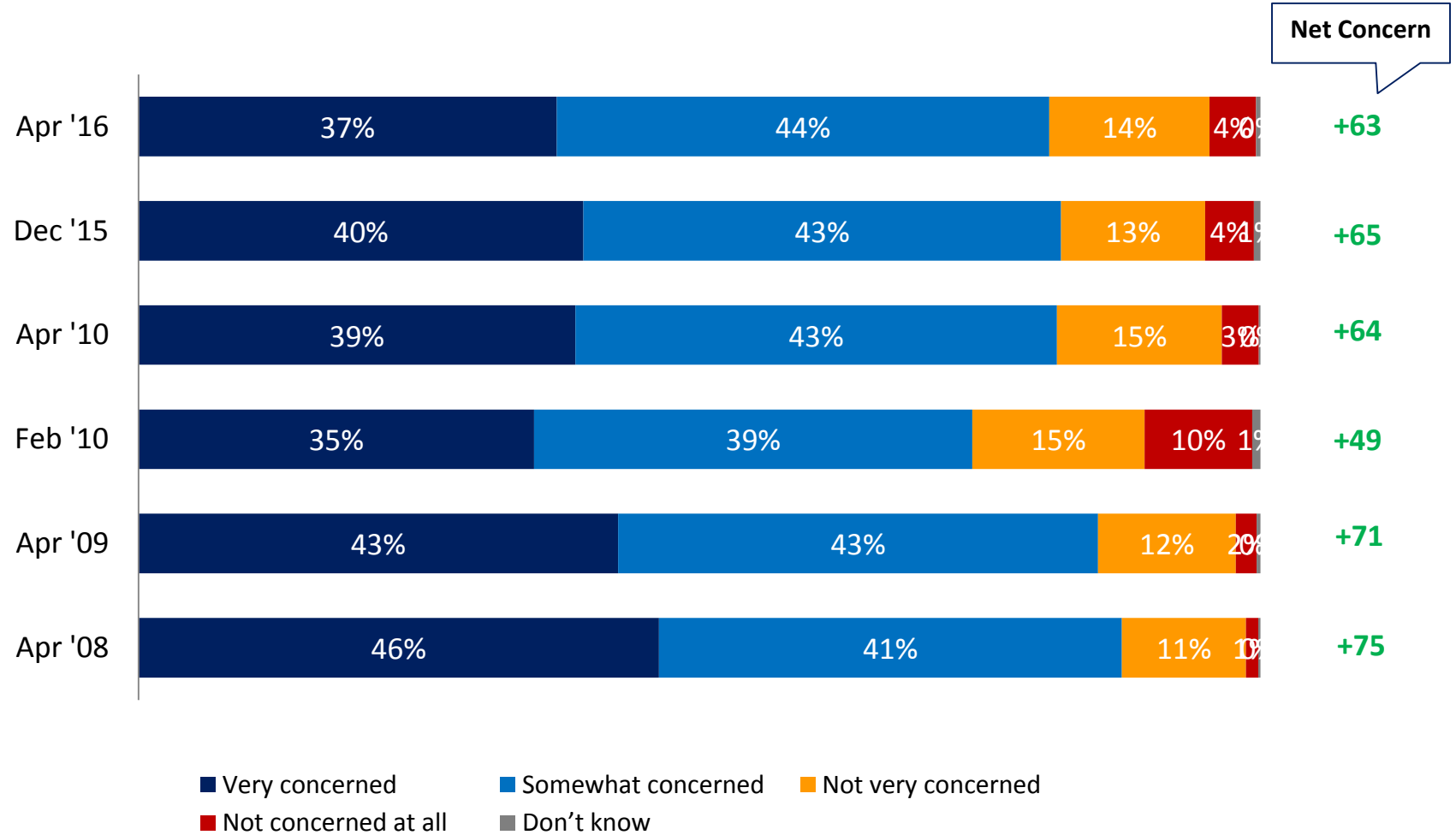
- Climate change is definitely occurring
- Climate change is probably occurring
- Climate change is probably not occurring
- Climate change is definitely not occurring
- Don't know

Concern Over CC: intensity of concern is marginally lower than back in December



How concerned are you about climate change?

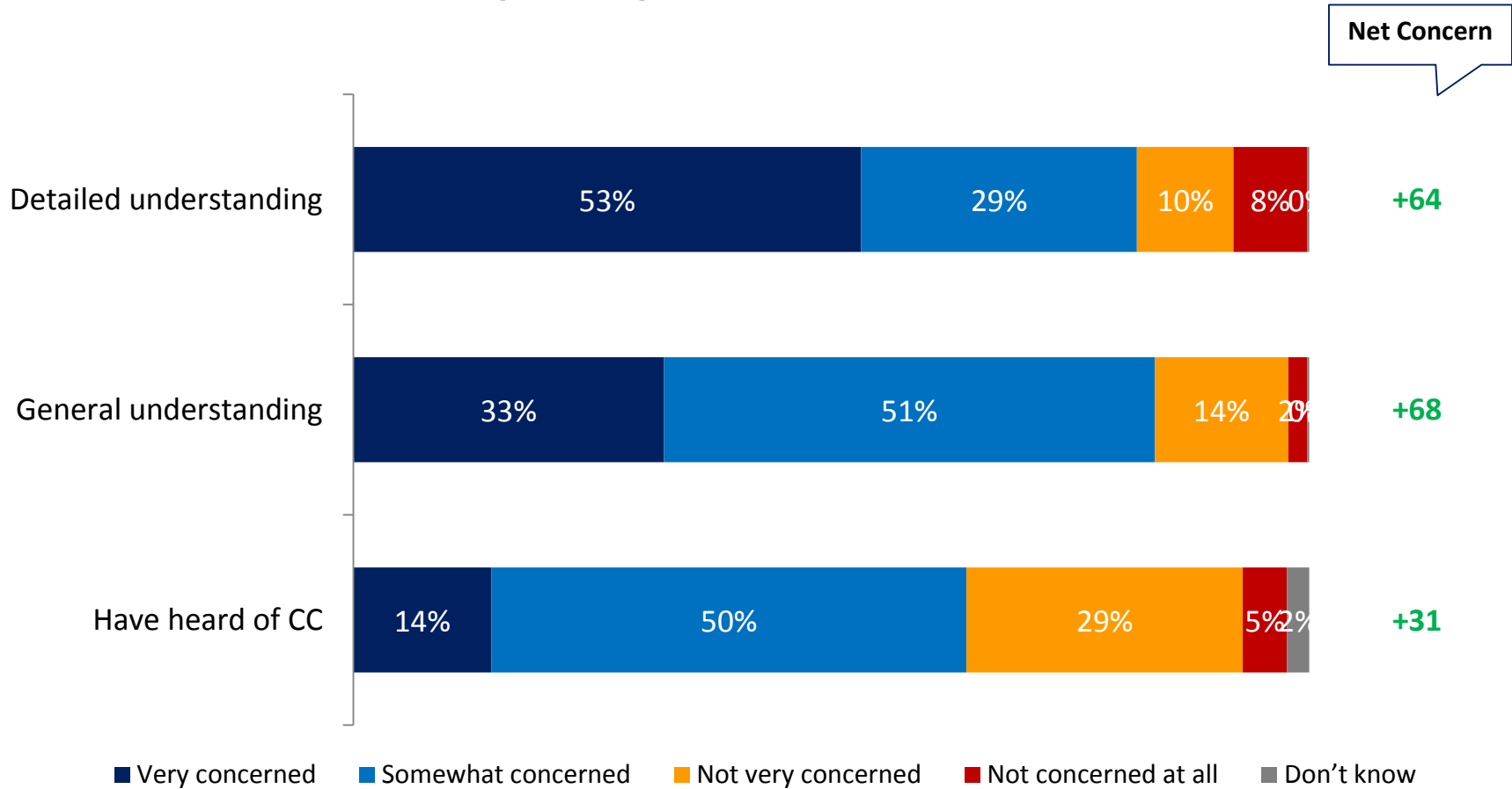
[asked of those who believe climate change is occurring ; n=1,684]



NOTE: Prior to 2010, the term “global warming” was used in place of “climate change”

Concern by Familiarity: intensity of concern increases significantly with level of understanding

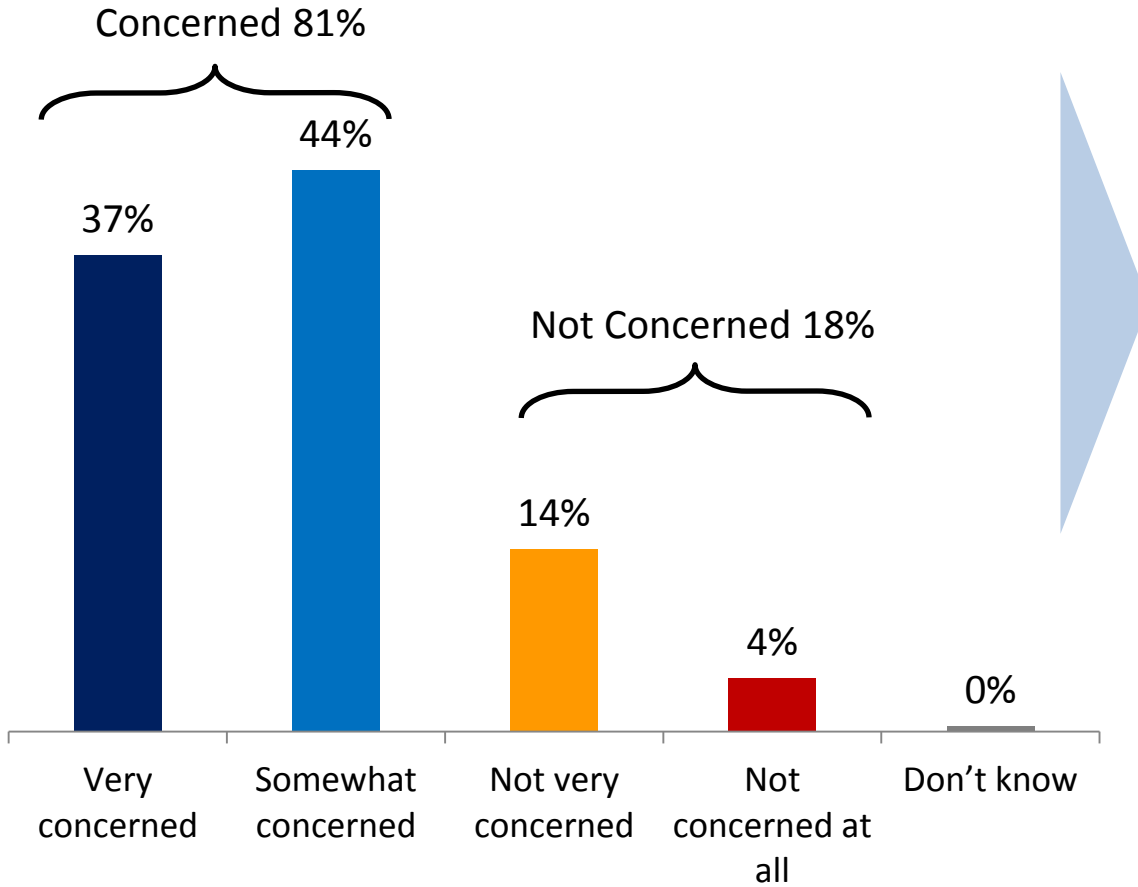
Q How familiar are you with the concept of climate change?
 AND
 How concerned are you about climate change?
 [asked of those who believe climate change is occurring; n=1,684]



Concern Over CC: concern highest among NDP, lowest in Alberta and among Conservatives; decreases with age



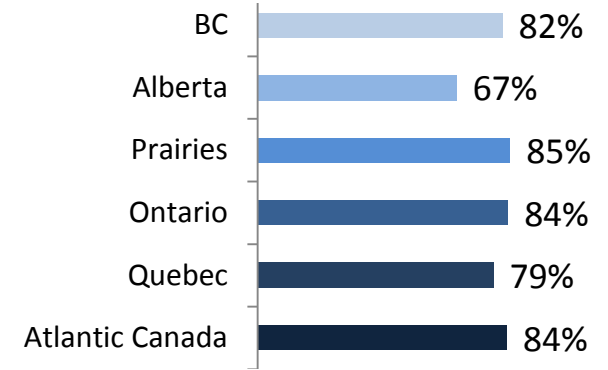
How concerned are you about climate change?
 [asked of those who believe climate change is occurring; n=1,684]



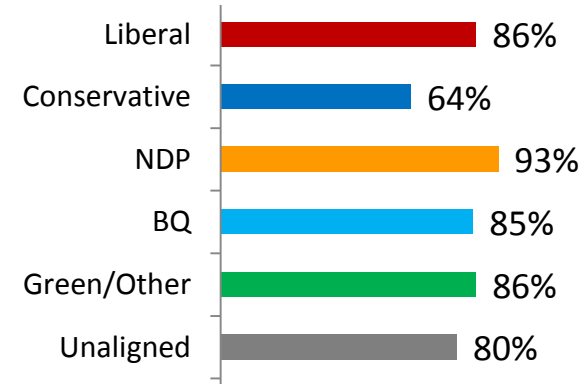
Sample Breakdown ▶▶

Those who say "concerned"

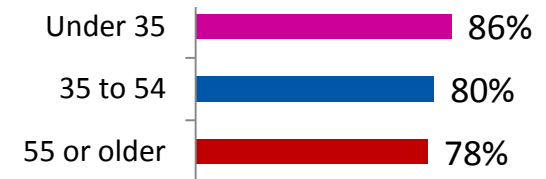
Region



Party ID



Age

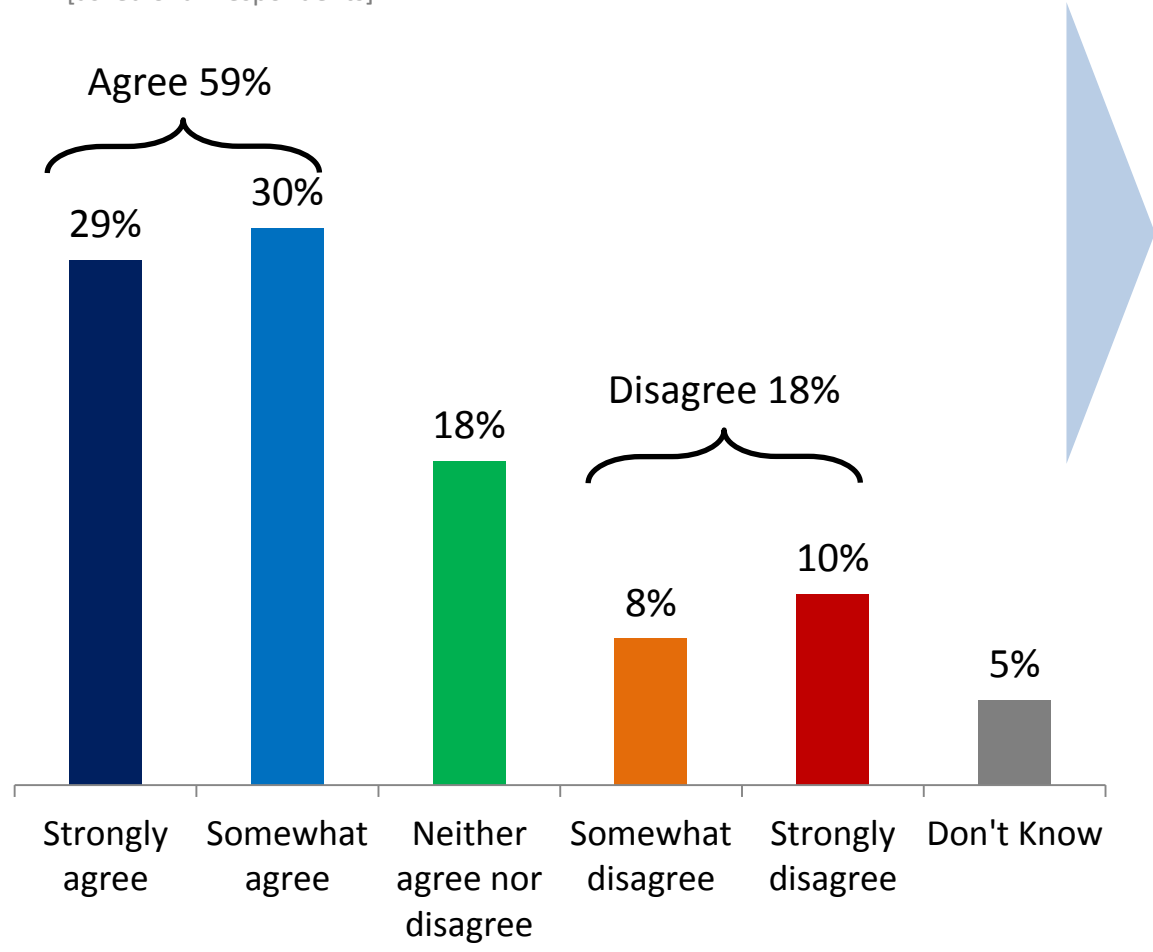


Urgency: Almost 6-in-10 feel we need to take dramatic action now if we want to stop climate change before it's too late

Q Below you will find some general statements about topics such as the environment and the economy. Please tell me if you agree or disagree with each of the following statements.

We need to take dramatic action now if we want to stop climate change before it's too late.

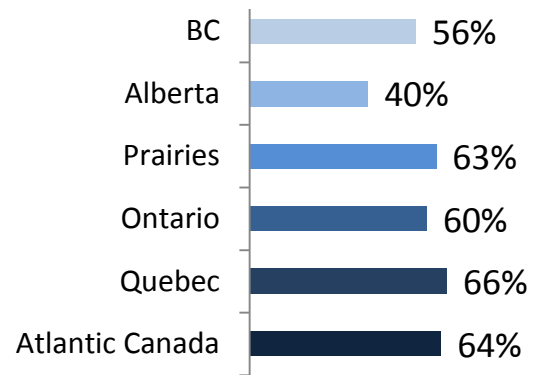
[asked of all respondents]



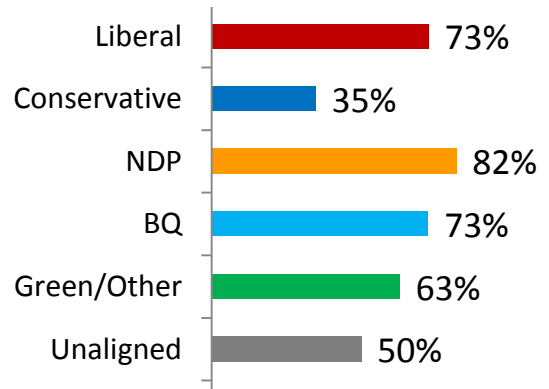
Sample Breakdown ▶▶

Those who say "agree"

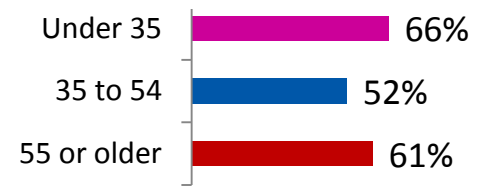
Region



Party ID



Age

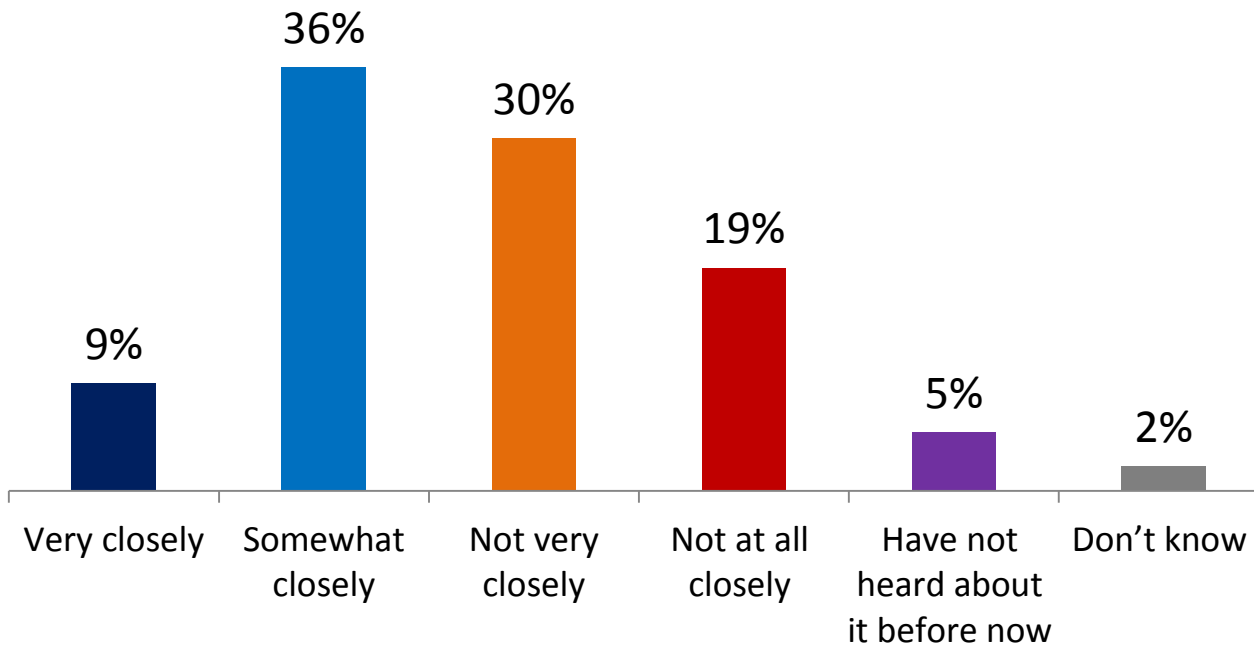


Climate Change Conference - December

COP21 Awareness: Only 9% followed COP21 very closely; highest among Core & Soft LPC



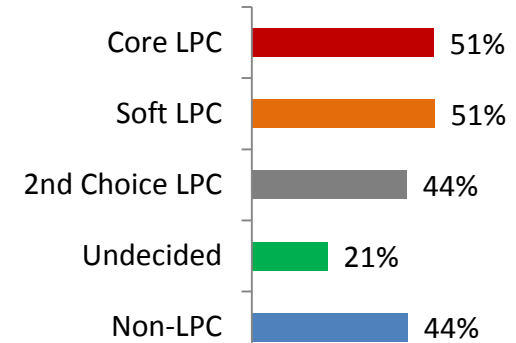
How closely have you been following the news about the UN Climate Change Conference in Paris that began on November 30 this year?
[all respondents, n=2,000]



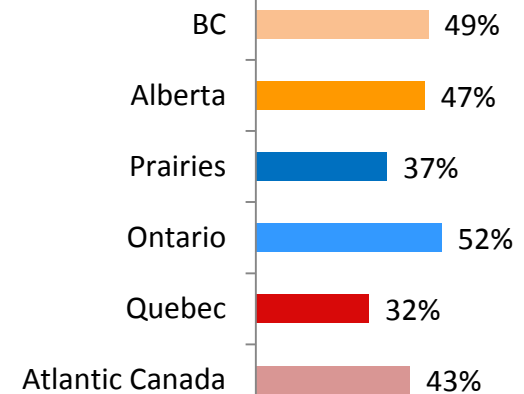
Sample Breakdown ▶▶

Percentage who say they have been following the conference

LPC Voter Pools



Region

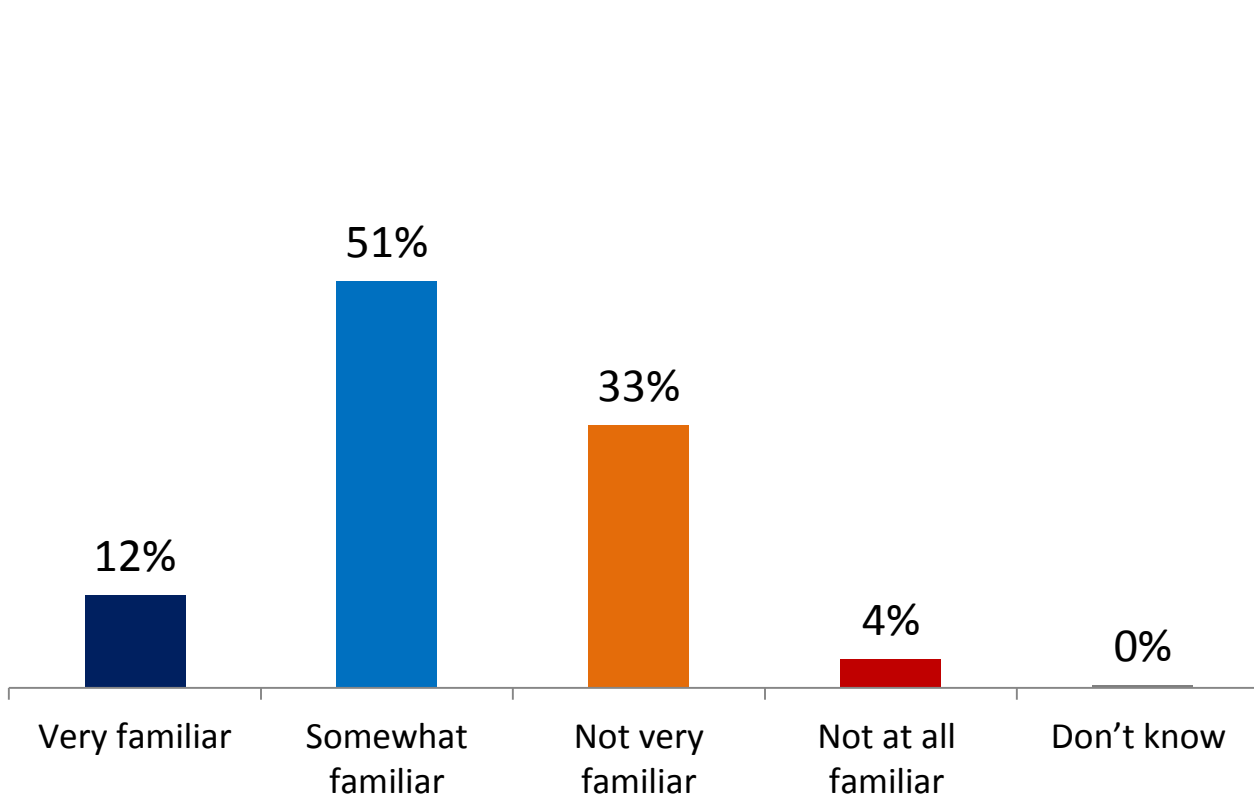


Trudeau Position Familiarity: Just 1-in-8 (12%) say they were very familiar; familiarity lowest amongst undecided



The goal of the conference is to negotiate a legally binding international climate change agreement. How familiar are you with the positions that Canada has taken at the conference on what this agreement would or would not contain?

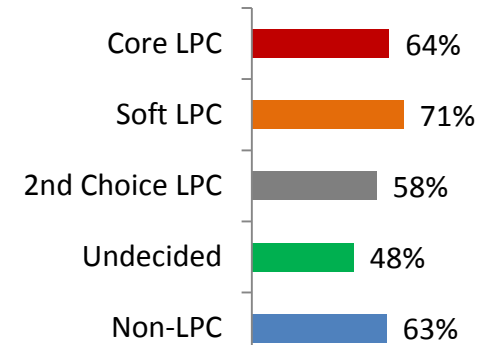
[asked of those respondents who have been following the COP21 conference , n=1,486]



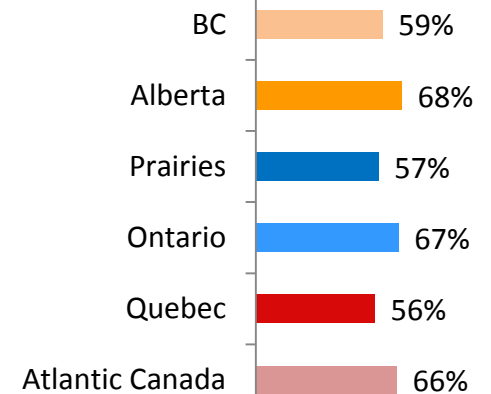
Sample Breakdown ▶▶

Percentage who say they are at least somewhat familiar

LPC Voter Pools

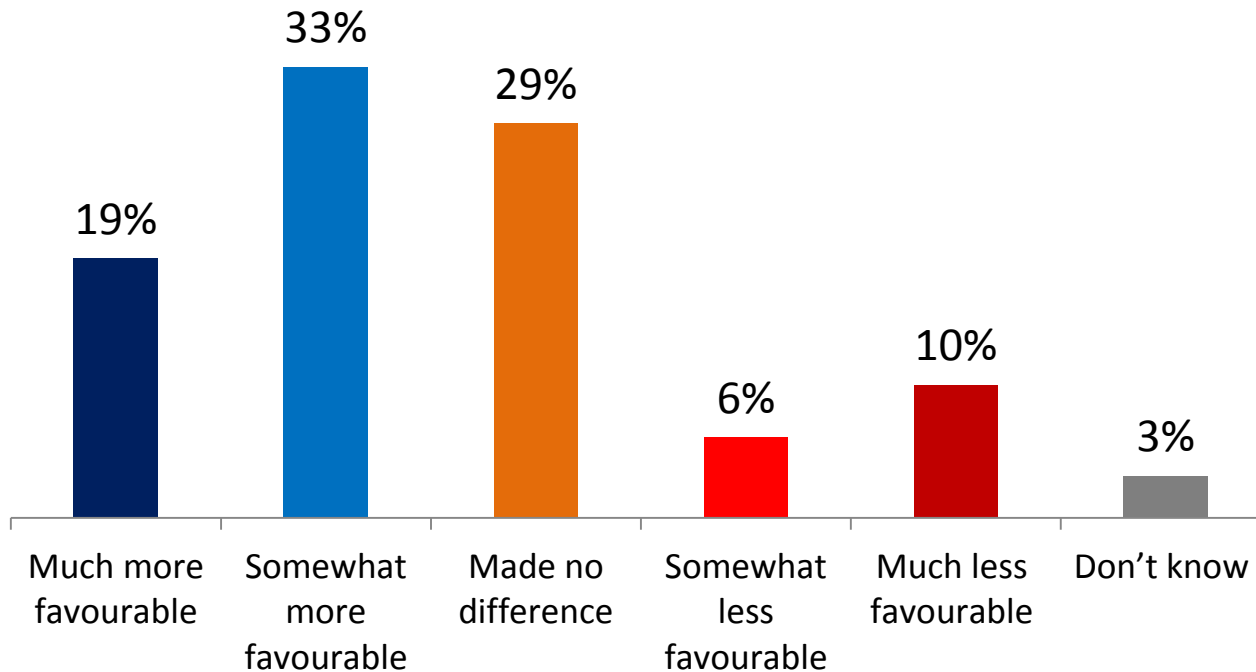


Region



Trudeau Approach Favourability: Over half (52%) say Trudeau's approach has left them feeling more favourable

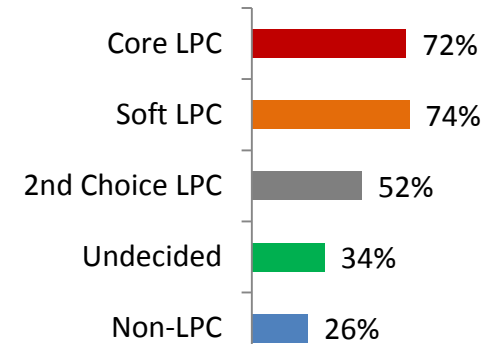
Q And based on what you know has the approach taken by Justin Trudeau and the Liberal government at the UN Climate Change Conference in Paris left you feeling more or less favourable towards them?
[asked of those who are at all familiar with Trudeau's position at the COP21 conference, n=1,427]



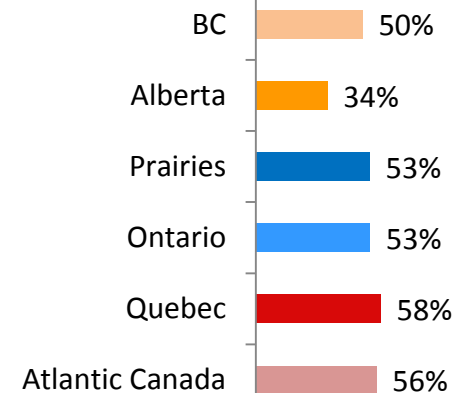
Sample Breakdown ▶▶

Percentage who say more favourable

LPC Voter Pools

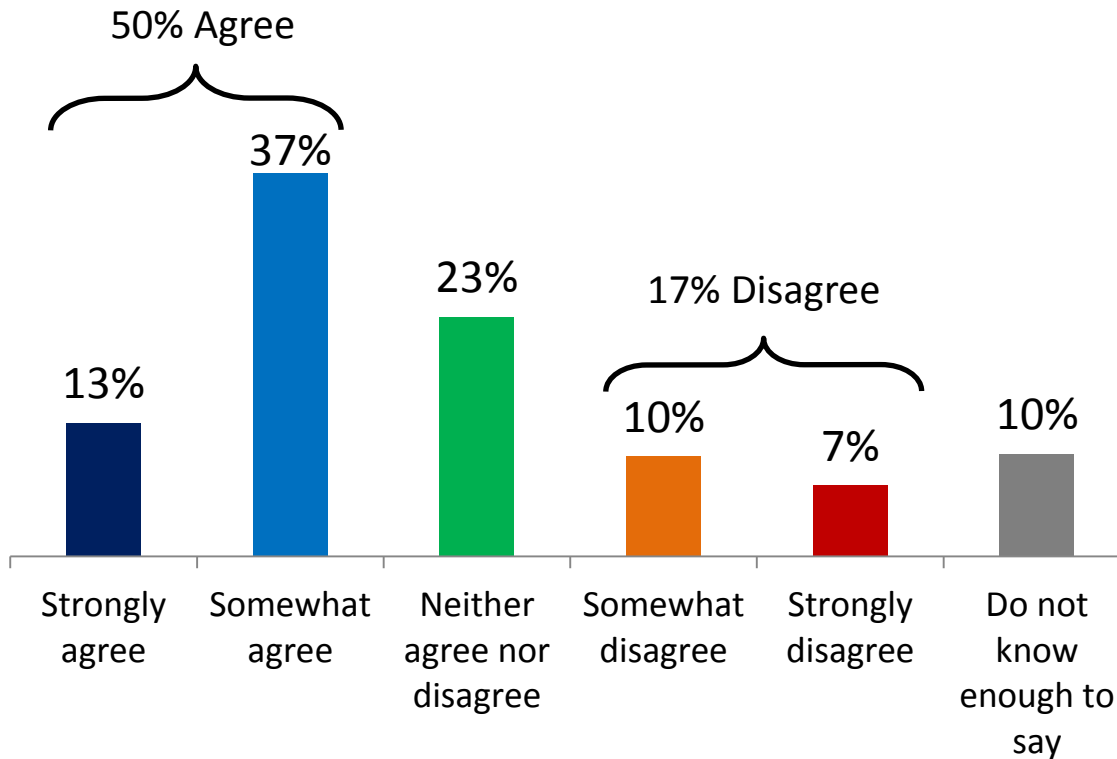


Region



Position on Carbon emissions: Half of respondents agree with the federal government's carbon emission position

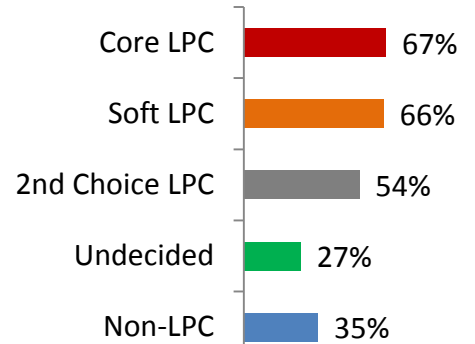
Q The federal government's policy on reducing carbon emissions is that each province should be free to keep their own policies in place to address carbon emissions and the role of the federal government will be to set standards and provide funding to the provinces. Based on what you know or your first impression, do you agree or disagree with this policy?
 [all respondents, n=2,000]



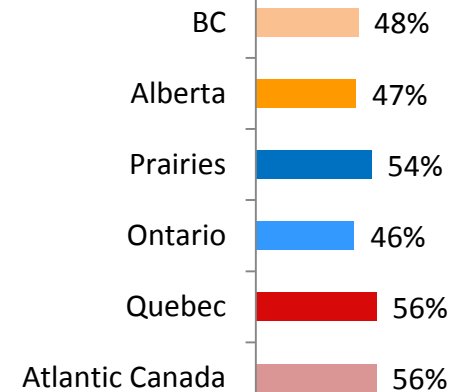
Sample Breakdown ▶▶

Percentage who say agree

LPC Voter Pools



Region



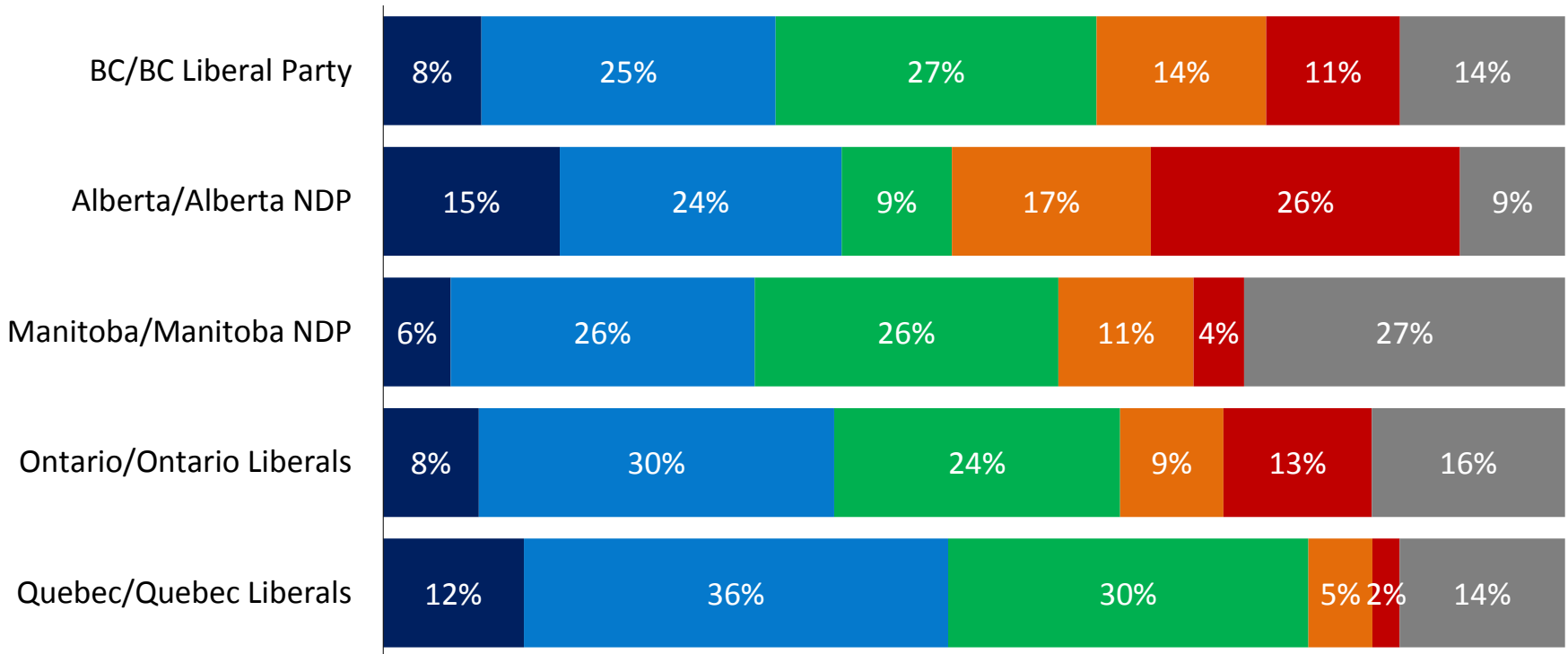
Provincial government positions on carbon emissions

Province	Position
<i>BC</i>	a revenue neutral carbon tax that has been in place since 2008, rising gradually each year and fully offset by reductions to other taxes
<i>Alberta</i>	a new climate change strategy that includes a carbon tax, phasing out coal generation, and capping overall oil sands emissions
<i>Manitoba</i>	to partner with Ontario and Quebec in a joint cap and trade system covering all 3 provinces
<i>Ontario</i>	to partner with Manitoba and Quebec in a joint cap and trade system covering all 3 provinces
<i>Quebec</i>	to partner with Ontario and Manitoba in a joint cap and trade system covering all 3 provinces

Provincial policies: new AB strategy sees similar support to other provinces, but higher opposition



The [PROV] government's current policy on reducing carbon emissions is [POSITION]. Based on what you know or your first impression, do you agree or disagree with this policy? [All respondents, n=2,000]



■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

AB policy the most polarized along political lines; BC's least popular among government supporters

Net support for positions by provincial TfC segments

<i>Province and incumbent premier/party:</i>	Core incumbent	Soft incumbent	TfC Incumbent	Ambivalent	Soft anti-incumbent	Hostile
BC: carbon tax since 2008	+19%	+18%	+33%	-2%	+9%	-4%
AB: New climate strategy	+78%	+7%	+44%	+17%	-15%	-72%
MB: 3 province cap and trade deal	+38%	+50%	+40%	+10%	+33%	-8%
ON: 3 province cap and trade deal	+54%	+49%	+50%	+11%	+33%	-36%
QC: 3 province cap and trade deal	+59%	+22%	+55%	+18%	+46%	+35%

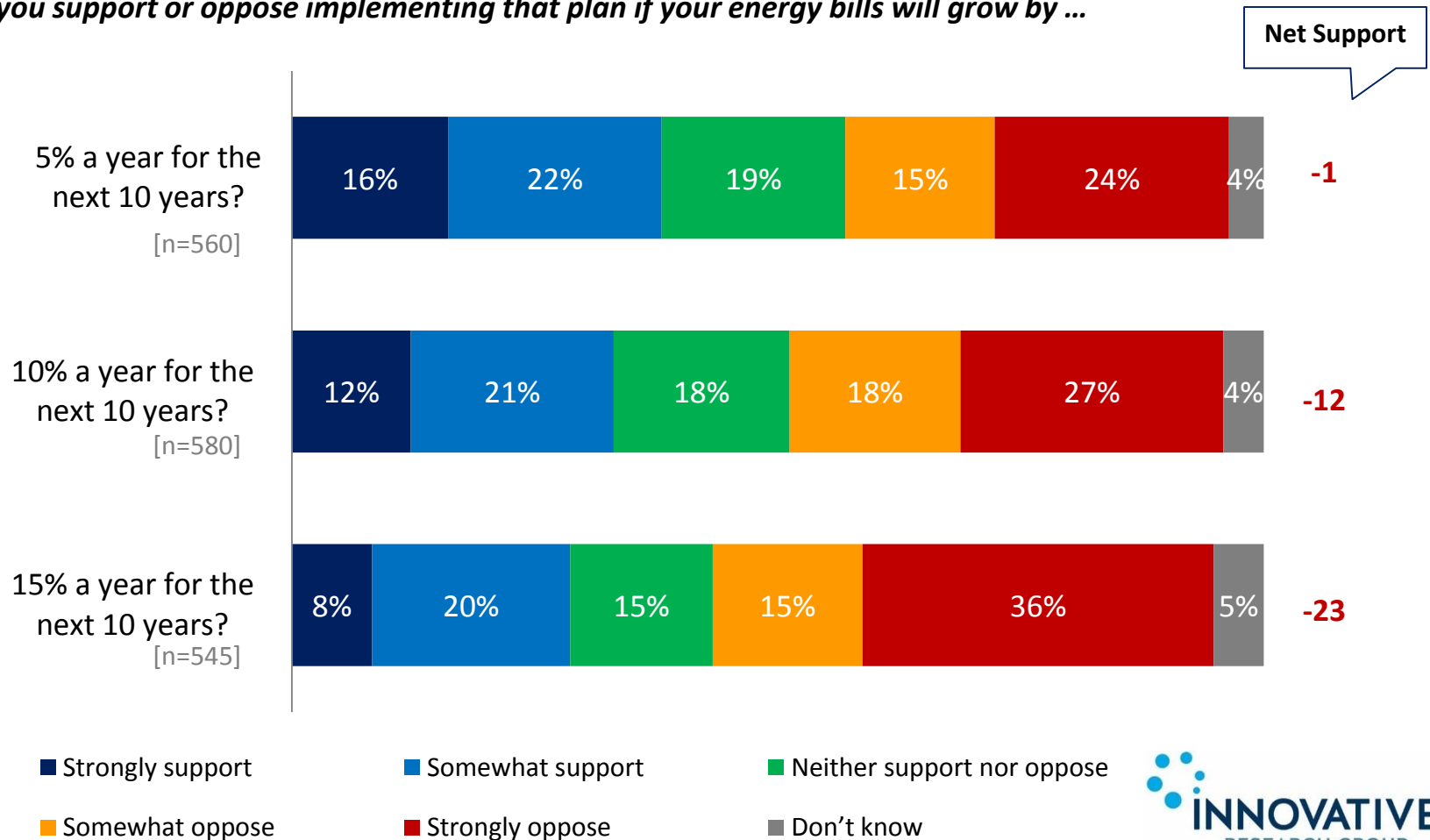
Paying for Carbon - April

Carbon Pricing: Opposition increases as rate increases

Q The federal and provincial governments are working on a plan to create a price for carbon in the energy we use. This includes carbon-based electricity generation such as natural gas, coal or oil, home heating fuels and gasoline and diesel used in cars and trucks.

[asked of those who believe climate change is occurring; n=1,684; sample divided into three parts, one for each option]

Would you support or oppose implementing that plan if your energy bills will grow by ...

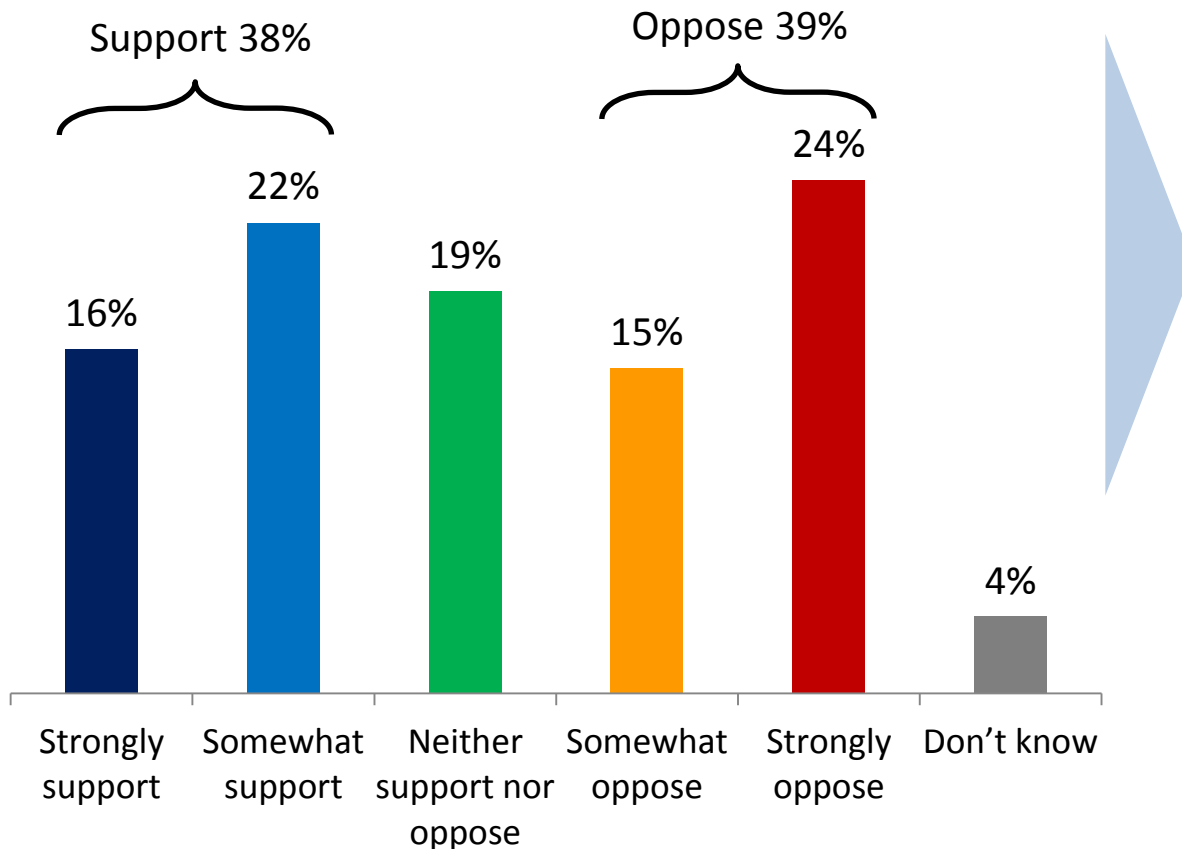


5% a Year for 10 Years: opposition more intense than support; Libs and NDP most willing to pay 5% more

Q The federal and provincial governments are working on a plan to create a price for carbon in the energy we use. This includes carbon-based electricity generation such as natural gas, coal or oil, home heating fuels and gasoline and diesel used in cars and trucks.

[asked of those who believe climate change is occurring; 1st split sample, n=560]

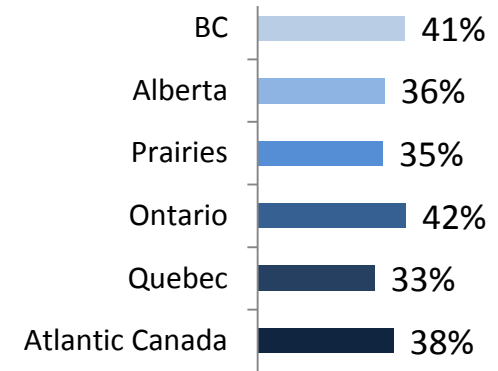
Would you support or oppose implementing that plan if your energy bills will grow by **5% a year for the next 10 years?**



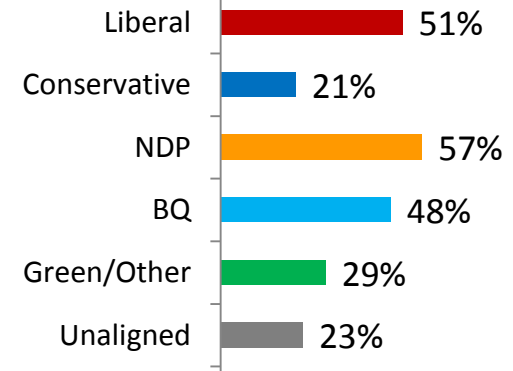
Sample Breakdown ▶▶

Those who say "support"

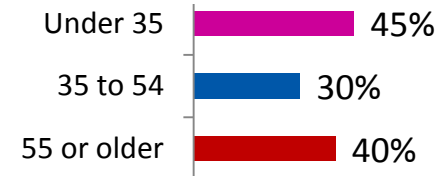
Region



Party ID



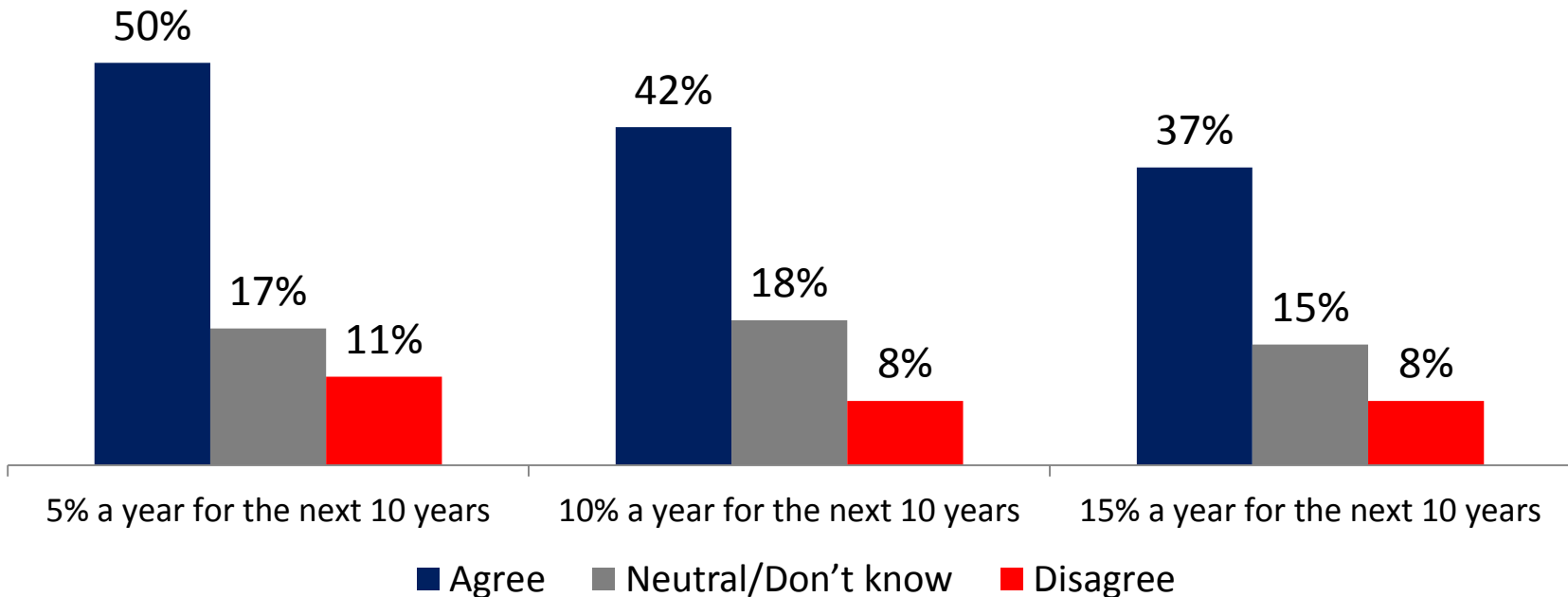
Age



Carbon Pricing By Motivation: among those who want to take dramatic action, support maxes out at 50%

Q The federal and provincial governments are working on a plan to create a price for carbon in the energy we use. This includes carbon-based electricity generation such as natural gas, coal or oil, home heating fuels and gasoline and diesel used in cars and trucks. Would you support or oppose implementing that plan if your energy bills will grow by ...? [asked of those who believe climate change is occurring; n=1,684; sample divided into three parts, one for each option]

Percentage Who Support Plan Given Cost of X%



“We need to take dramatic action now if we want to stop climate change before it's too late”

Carbon Pricing Support by Provincial Gov't Support

Q The federal and provincial governments are working on a plan to create a price for carbon in the energy we use. This includes carbon-based electricity generation such as natural gas, coal or oil, home heating fuels and gasoline and diesel used in cars and trucks. Would you support or oppose implementing that plan if your energy bills will grow by 5%/10%/15% a year for the next 10 years?
[asked of those who believe climate change is occurring]

	Government Supporter	Unaligned	Opposition Supporter
	<i>Net Support for Increase</i>		
BC	-18%	-18%	1%
Quebec	-4%	-21%	-21%
Ontario	23%	-41%	-29%
Alberta	40%	-9%	-41%
Canadian Average	9%	-25%	-21%



Research-based strategic advice.

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