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CASCADES STUDY CANADIANS' ECO-FRIENDLY HABITS

APRIL 2011
PROJECT 13460-006

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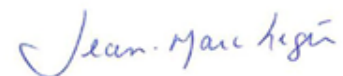
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We are proud to present you with this research report, which was produced under the stringent quality standards of our company and those of the Marketing Research and Intelligence Association (MRIA). We are confident that this report will address your concerns and we hope to have the privilege of serving you again in the near future.



Jean-Marc Léger
President

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CONTEXT AND OBJECTIVES





CONTEXT AND OBJECTIVES

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Léger Marketing was commissioned by HKDP Communications and public affairs, on behalf of their client Cascades, to conduct a study with Canadians in order to evaluate their attitudes and behaviours toward the environment. More specifically, the main objectives of the study were as follows:

- To evaluate Canadians' perceptions and attitudes toward the environment;
- To determinate their environmental purchases and gestures;
- To identify their sources of environmental information ;
- To determinate people who influence their recycling habits;
- To create indices to monitor environmental purchases.



RESEARCH METHODS



RESEARCH METHODS

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To achieve this, an online survey was conducted from March 22nd to 28th with a representative sample of 1047 English or French speaking Canadians, between 18 and 64 years of age.

Using data from Statistics Canada, the results were weighted according to gender, age, region, language spoken at home, education and presence of minor in the household to ensure a sample representative of the entire population under review.

When possible (identical question and methodology), the results are compared with a previous Cascades study conducted in March 2010.

Notes:

- The numbers presented in this report have been rounded out and their sum in graphs and tables (based on real numbers before rounding) might not correspond to the manual addition of the rounded numbers.
- Results presenting significant statistical differences are indicated following the presentation of overall results.
- In this report, results presented in bold red characters represent statistically lower differences when compared to their complement, while results in bold green characters indicate statistically higher differences when compared to their complement.
- Arrows represent statistically lower or higher differences when compared to the Cascades 2010 study.
- The acronym DNK means “I do not know”.



HIGHLIGHTS



HIGHLIGHTS

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Based on the results, it is possible to draw broad conclusions about the perceptions, attitudes and behaviours of Canadians toward the environment.

- Globally , women, French speaking Canadians, Quebecers, people aged 45 to 64, retired Canadians, residential owners and decision makers in charge of grocery and drugstore purchases are significantly more likely to be concerned about the environment. Men, 18 to 24 year olds, English speaking Canadians, students, residents of Saskatchewan and non decision makers (or partly) are significantly less likely to be concerned with the environment.
- In general, Canadians are concerned with the environment and perceive themselves as environmentally responsible. Although most Canadians do not spontaneously associate the colour green with the environment, they believe eco-friendly statements and environmental certifications as important ones. In their opinion, putting recyclable or compostable materials in the selective recycling bin is still the action that has the greatest impact on the environment. British-Columbia is perceived as the greenest Canadian province followed by Quebec and Ontario.
- Furthermore, Canadians believe in making environmentally responsible purchases, such as helping to promote paper recycling by buying products made from recycled fibres, or take reusable bags when grocery shopping. Likewise, Canadians believe in recycling and find that the products they buy are often over-packaged. Although Canadians are divided in their attitudes toward claims featured on packaging, this may be due the confusion over many eco-friendly claims.
- Limiting their use of electricity and putting their recyclable / compostable materials in the selective recycling bin are the main daily actions that Canadians make at home in order to reduce their impact on the environment. Some actions are less frequently performed, such as purchasing paper products made from recycled fibres.
- Although the vast majority of Canadians say they make environmentally friendly actions at home, most of them are not willing to pay, or to pay more, to reduce their ecological footprint.
- Canadians seems to be influenced by the environmental gestures made by public place owners, manufacturers, family members, their children (for parents) and by David Suzuki.
- The most important sources where Canadians go to get information about the environment are the Internet and traditional media (such as television, newspapers, etc.). They not appear to frequently consult specialized sources.

2005	25%
2006	35%
2007	36%
2008	48%
2009	55%
2010	80%
2011	85%



+40%

+10%

+20%

DETAILED ANALYSIS OF RESULTS



PERCEPTIONS



DETAILED ANALYSIS OF RESULTS

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SPONTANEOUS ASSOCIATION TO THE COLOUR GREEN

Spontaneously, only 7% of Canadians associate the colour green with the environment. It is the second most popular answer, and the number one in Quebec. When we asked them what is the first word that came to mind when they thought of the colour green, grass, pastures, plants and trees (44%) are the most popular answers.

Q1. What is the first word that comes to mind when you think of the colour green?

Base: All the respondents (n=1047)

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Grass / Pastures / Park / Garden / Plants / Leaves / Trees / Forest / Flowers	44%	35%	38%	45%	54%	52%	47%	50%
Environment / Good for the environment / Environmentalists/ Green party/ Elisabeth May	7%	2%	10%	7%	5%	1%	3%	7%
Nature / Natural / Ecosystem	6%	8%	11%	4%	2%	1%	0%	7%
Irish/ St-Patrick's day/ Shamrock	6%	10%	5%	6%	8%	2%	5%	3%
Spring / Summer	6%	11%	8%	5%	0%	8%	6%	4%
Apple / Lime / Kiwi / Cucumber / Broccoli / Spinach / Salad / Peas / Vegetables	5%	7%	9%	4%	0%	0%	3%	0%
Money	4%	4%	2%	4%	10%	3%	4%	4%
Fresh	2%	2%	2%	1%	0%	0%	2%	5%
Eco-friendly / Eco-friendly products / Sustainability / Garbage bags / truck / Green washing	1%	2%	1%	2%	1%	0%	1%	1%
Frog / Kermit the Frog / Turtle	1%	0%	2%	2%	0%	0%	1%	0%
Recycling	1%	0%	0%	1%	0%	0%	1%	4%
Hope	1%	0%	3%	0%	0%	0%	0%	0%
Earth	1%	1%	0%	2%	0%	0%	1%	0%
Saskatchewan Roughriders / A football team	1%	0%	0%	0%	0%	14%	1%	0%
Go / Crossing light	1%	1%	0%	1%	0%	0%	0%	2%
The colour green / Favorite colour	1%	3%	1%	2%	0%	2%	0%	0%
Envy / Jealousy	1%	1%	0%	0%	1%	0%	0%	2%
Weed / Marijuana	1%	1%	0%	1%	2%	0%	1%	1%
Peace / Relaxation / Cool / Soft / Soothing / Comfort	1%	2%	0%	2%	3%	3%	0%	1%
Vitality / Energy / Life / Fertility / Health / Healing	1%	2%	1%	1%	2%	3%	0%	0%
Others	8%	6%	4%	8%	6%	8%	18%	9%
DNK / Refusal	3%	4%	2%	4%	6%	2%	3%	0%



DETAILED ANALYSIS OF RESULTS

MOST IMPORTANT ISSUE FOR THE PLANET

A quarter of Canadians (25%) believe that greenhouse gas emissions are the biggest worrisome issue for the planet. However, significantly more Quebecers are of that opinion.

People between 18 and 24 years old (36%), students (34%), men (28%), French-speaking Canadians (37%) and people who are not in charge of grocery and pharmacy purchases (34%) are significantly more likely to believe that greenhouse gas is the most important issue facing the planet.

Water management (20%), energy (18%) and air quality (15%) are three others important concerns for Canadians. For their part, Albertans are more worried about water management than any other issue.

Q8. Which of the following do you believe is the biggest issue facing the planet?

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Greenhouse gas	25%	22%	36%	23%	19%	15%	21%	18%
Water management	20%	16%	24%	16%	28%	29%	31%	17%
Energy	18%	25%	11%	20%	7%	19%	17%	24%
Air quality	15%	17%	16%	17%	20%	22%	9%	8%
Responsible management of forests	7%	8%	6%	6%	4%	0%	8%	9%
Oil sands	3%	3%	0%	4%	3%	0%	2%	3%
Shale gas	1%	0%	2%	0%	0%	0%	0%	3%
DNK / Refusal	12%	9%	5%	14%	18%	14%	12%	18%



DETAILED ANALYSIS OF RESULTS

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THE GESTURE THAT HAS THE GREATEST IMPACT ON THE ENVIRONMENT

One Canadian out of five (21%) believes that putting recyclable or compostable materials in the selective recycling bin is the gesture that has the greatest positive impact on the environment.

However, results vary widely across provinces. Indeed, while recycling is the most important action for Quebecers, it is much less important to Canadians living in the Atlantic provinces. Likewise, limiting the use of electricity is very impactful for Ontarians but not for Quebecers (where electricity is cheaper).

Q4. Among all of these gestures, which do you feel has the greatest impact on the environment?

Base: All the respondents (n=1047)

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Put recyclable / compostable materials in the selective recycling bin	21%	10%	27%	18%	22%	17%	20%	23%
Don't use fertilizers, pesticides or chemical herbicides	14%	20%	14%	11%	19%	9%	14%	17%
Limit your use of plastic bottles	10%	9%	10%	12%	12%	0%	7%	13%
Limit your use of electricity	9%	11%	2%	15%	2%	18%	11%	5%
Buy locally-grown fruits and vegetables when it is possible	8%	13%	9%	6%	0%	7%	9%	8%
Limit your use of water	7%	6%	11%	5%	3%	10%	7%	2%
Buy energy-efficient appliances	7%	7%	3%	8%	9%	12%	12%	5%
Use green or biodegradable cleaning products	4%	6%	7%	3%	5%	3%	1%	6%
Turn down the heat a few degrees during the winter	4%	3%	2%	5%	5%	12%	4%	2%
Buy organic fruits and vegetables	2%	1%	1%	2%	0%	0%	1%	3%
Compost organic materials yourselves	2%	2%	2%	1%	3%	0%	2%	6%
Use phosphate-free detergents	2%	4%	2%	1%	3%	2%	2%	0%
Wash your clothes in cold water	2%	4%	3%	1%	0%	0%	3%	1%
Buy paper products (bathroom tissue, paper towels) made from recycled fibres	1%	0%	1%	2%	2%	2%	1%	1%
Use an electric / manual lawn mower	1%	0%	2%	1%	2%	0%	1%	1%
DNK / Refusal	7%	6%	4%	8%	13%	9%	5%	8%



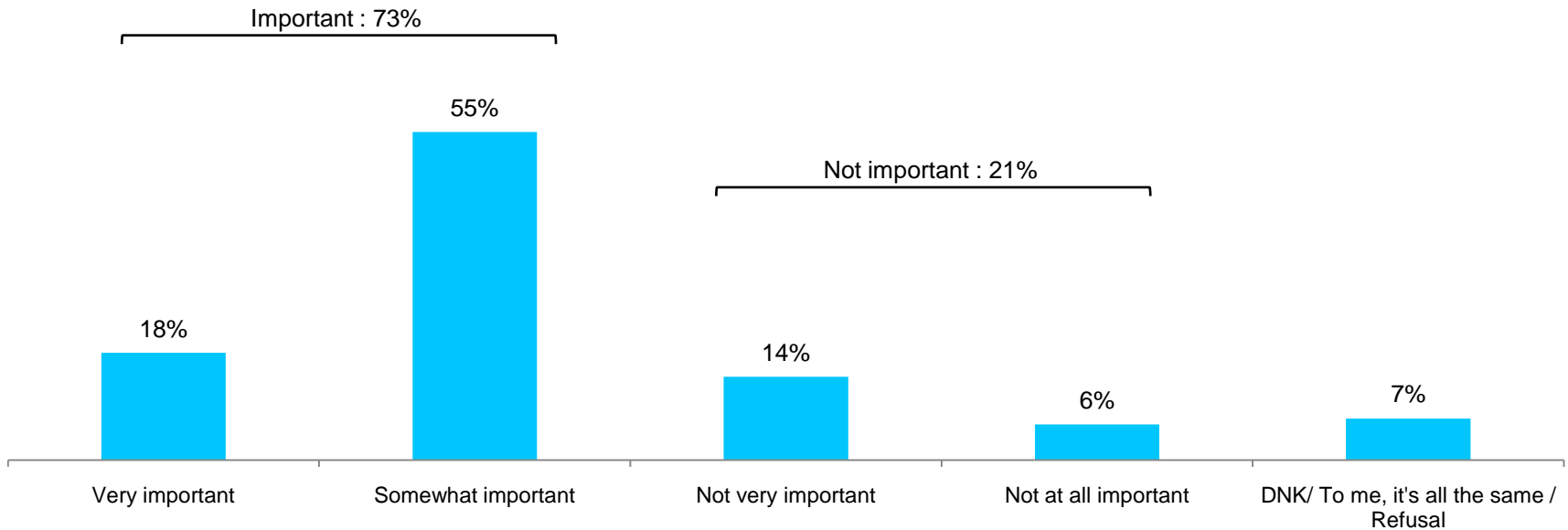
DETAILED ANALYSIS OF RESULTS

IMPORTANCE OF ECO-FRIENDLY STATEMENTS

Seven Canadians out of ten (73%) say that eco-friendly statements like “ecological footprint” and “sustainable development” are important when they select a product. Women (76%) and people aged 55 to 64 years old (83%) are more likely to be influenced by eco-friendly statements.

Q22. When the time comes for you to select a product, how much do the following statements matter to you: Ecological footprint, life cycle, sustainable development, biodegradable?

Base: All the respondents (n=1047)





DETAILED ANALYSIS OF RESULTS

IMPORTANCE OF ECO-FRIENDLY STATEMENTS – DETAIL BY PROVINCE

Q22. When the time comes for you to select a product, how much do the following statements matter to you: Ecological footprint, life cycle, sustainable development, biodegradable?

Base: All the respondents (n=1047)

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
TOTAL IMPORTANT	73%	74%	72%	74%	66%	59%	70%	77%
Very important	18%	27%	15%	18%	21%	7%	17%	19%
Somewhat important	55%	47%	57%	56%	45%	52%	53%	58%
TOTAL NOT IMPORTANT	21%	17%	24%	18%	27%	26%	23%	18%
Not very important	14%	7%	20%	13%	14%	17%	13%	13%
Not at all important	6%	10%	4%	6%	13%	9%	10%	5%
DNK / To me, it's all the same / Refusal	7%	9%	4%	8%	7%	15%	6%	5%



DETAILED ANALYSIS OF RESULTS

MOST IMPORTANT CERTIFICATION

35% of Canadians say that the most important certification is being biodegradable. English speaking Canadians (42%), people between 55 and 64 years of age (45%), and retired individuals (45%) are significantly more likely to consider biodegradable as the most important certification. Conversely, Quebecers (13%) place less importance on the biodegradable label.

A quarter of Canadians (23%) say that being local is the most important certification they consider when they buy products. Quebecers (31%), French speaking Canadians (29%), people aged 25 to 34 (31%) and retired Canadians (25%) are significantly more likely to be impacted by a local certification.

Q21. Which of the following certifications do you consider the most important?

Base: All the respondents

	TOTAL (n=1047)	ATL. (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Biodegradable	35%	36%	13%	42%	46%	44%	45%	42%
Local	23%	32%	31%	20%	12%	15%	18%	23%
Green	19%	9%	31%	16%	18%	12%	17%	11%
Fair trade	12%	8%	15%	11%	11%	10%	9%	13%
DNK / Refusal	11%	15%	10%	10%	13%	19%	11%	11%



DETAILED ANALYSIS OF RESULTS

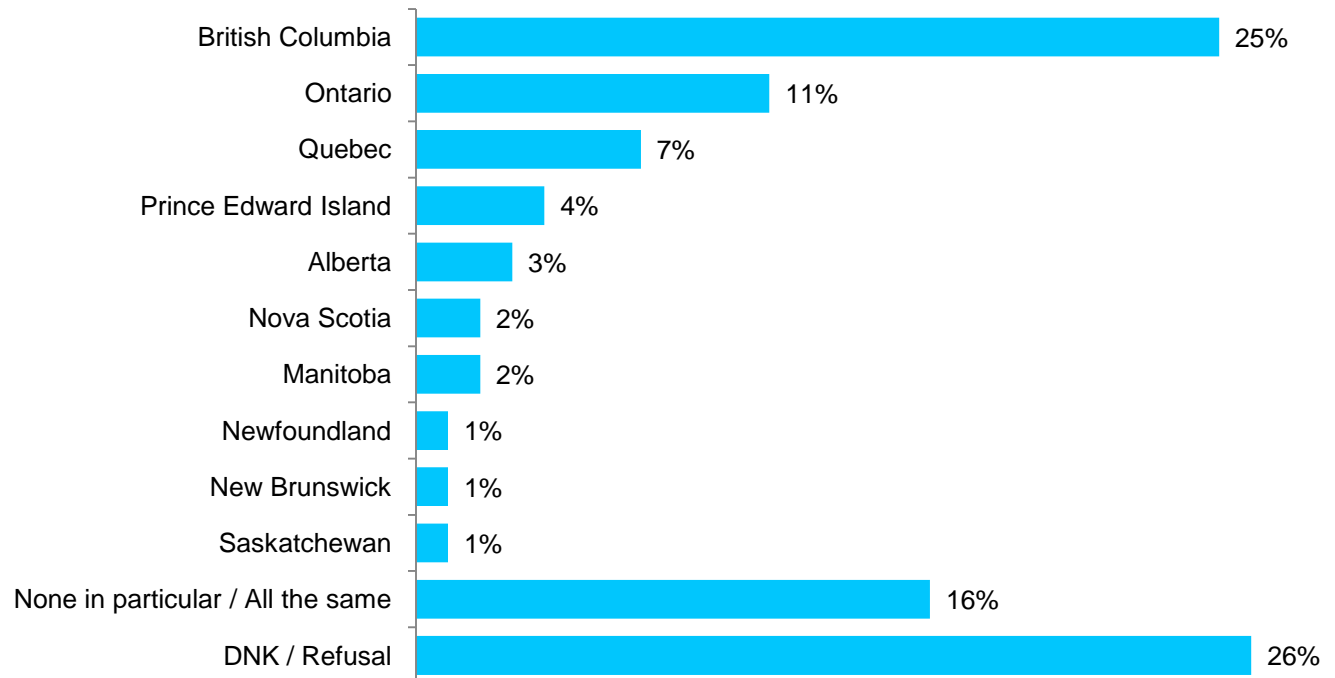
GREENER CANADIAN PROVINCE

One out of four Canadians (25%) believe that British Columbia is the most ecologically responsible province. Residents of each Canadian province are more likely to say that their own province is the most ecologically responsible.

Over a quarter of respondents (26%) were unable to identify the most ecologically responsible province, while 16% believe that all provinces are about the same.

Q23. In your opinion, which Canadian province is the most ecologically responsible?

Base: All the respondents (n=1047)



ATTITUDES



DETAILED ANALYSIS OF RESULTS

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT ENVIRONMENTALLY RESPONSIBLE PURCHASES

On average, Canadians agree that buying products made from recycled fibres helps to promote paper recycling (7,7) and they always bring their reusable bags when grocery shopping (7,6). Overall, French speaking Canadians and women are more environmentally responsible when it comes to their purchasing behaviour.

Q3A - Q3J. The following is a series of statements that may correspond to the gestures you make or opinions you have when it comes to making environmentally responsible purchases. Please indicate how strongly you agree with each statement using a 1 to 10 scale, where 10 means you STRONGLY AGREE and 1 mean you STRONGLY DISAGREE.

Base: All the respondents (n=1047)

	Mean	Low (1 to 6)	Medium (7 and 8)	High (9 and 10)	DNK / Refusal
I feel that by buying products made from recycled fibres, I am helping to promote paper recycling.	7,7	24%	31%	43%	2%
When I go to the grocery store, I always take my reusable bags with me.	7,6	28%	19%	51%	2%
Paper towels made from recycled paper are just as absorbent and those made from virgin paper.	7,3	27%	25%	33%	15%
I prefer buying products made from recycled materials.	7,0	37%	31%	30%	3%
I would be willing to change the brand of bathroom tissue or paper towels that I use for a product that has less of an environmental impact.	7,0	36%	26%	35%	3%
I try as much as possible to buy locally made products.	6,9	39%	28%	32%	2%
I have changed my consumption habits in order to reduce the environmental impact of my purchases.	6,6	41%	33%	24%	2%
Bathroom tissue made from recycled paper is just as soft as that made from virgin paper.	6,5	38%	21%	25%	15%
When I buy a household consumer product, I always think of how I will dispose of it after I have used it.	6,1	50%	27%	21%	2%
I am willing to pay more for products that are more environmentally friendly.	5,5	61%	24%	14%	1%



DETAILED ANALYSIS OF RESULTS

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT ENVIRONMENTALLY RESPONSIBLE PURCHASES – DETAIL BY PROVINCE

While Quebecers are significantly more likely to agree with the given statements, respondents from the Prairies are less so.

Q3A - Q3J. The following is a series of statements that may correspond to the gestures you make or opinions you have when it comes to making environmentally responsible purchases. Please indicate how strongly you agree with each statement using a 1 to 10 scale, where 10 means you STRONGLY AGREE and 1 mean you STRONGLY DISAGREE.

Base: Respondents who give 7 or more

Grades 7 and more	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
I feel that by buying products made from recycled fibres, I am helping to promote paper recycling.	74%	72%	82%	75%	62%	56%	66%	72%
When I go to the grocery store, I always take my reusable bags with me.	70%	55%	82%	71%	59%	46%	58%	70%
Paper towels made from recycled paper are just as absorbent and those made from virgin paper.	58%	64%	64%	58%	44%	52%	52%	57%
I prefer buying products made from recycled materials.	61%	56%	70%	57%	52%	40%	59%	63%
I would be willing to change the brand of bathroom tissue or paper towels that I use for a product that has less of an environmental impact.	61%	67%	69%	60%	39%	24%	54%	66%
I try as much as possible to buy locally made products.	59%	65%	65%	62%	53%	37%	51%	52%
I have changed my consumption habits in order to reduce the environmental impact of my purchases.	57%	63%	65%	55%	47%	33%	50%	58%
Bathroom tissue made from recycled paper is just as soft as that made from virgin paper.	46%	55%	50%	46%	32%	34%	43%	44%
When I buy a household consumer product, I always think of how I will dispose of it after I have used it.	48%	48%	53%	48%	56%	25%	43%	46%
I am willing to pay more for products that are more environmentally friendly.	37%	35%	46%	35%	30%	29%	34%	36%

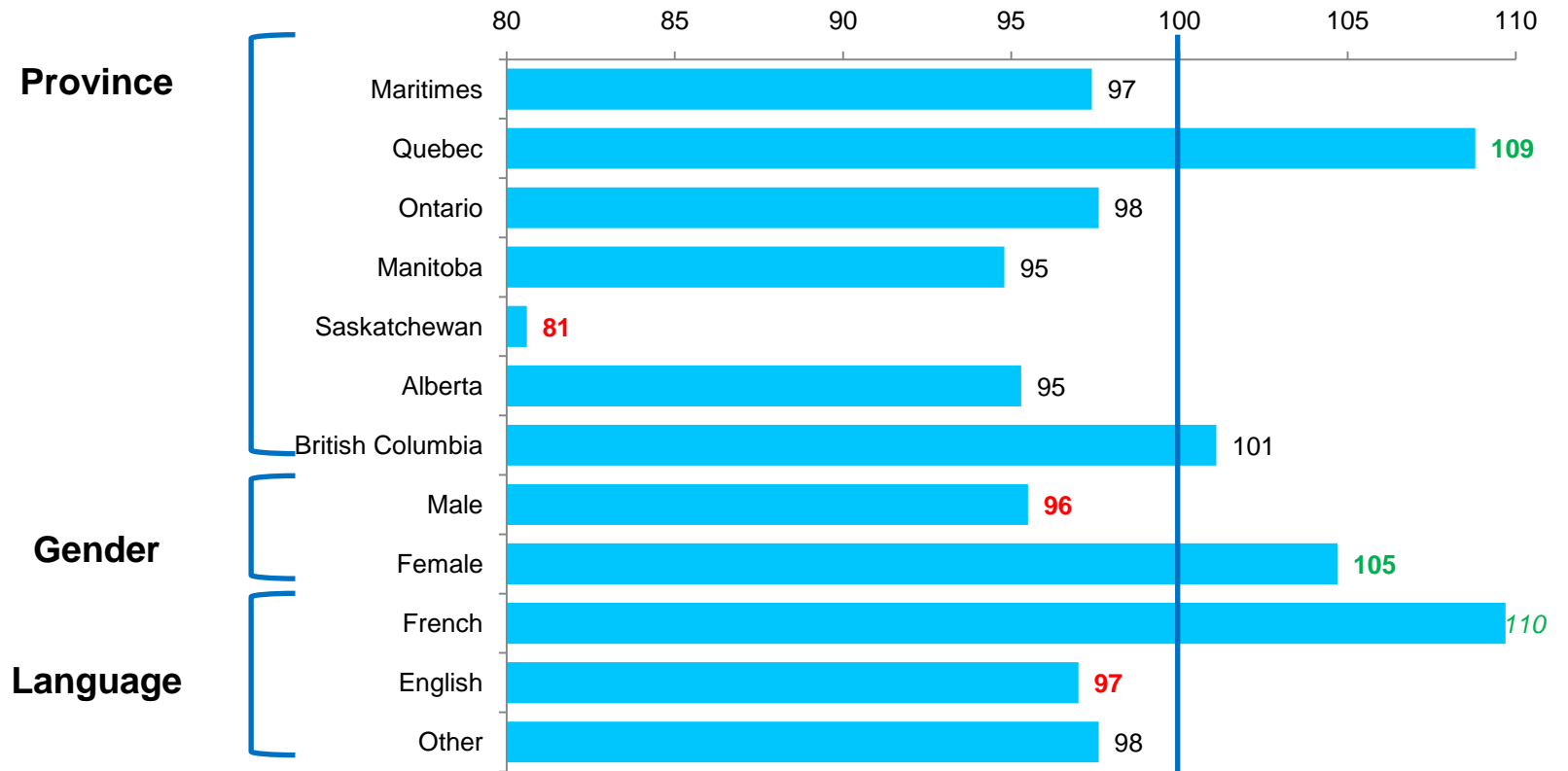


DETAILED ANALYSIS OF RESULTS

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INDICES BY PROVINCE, GENDER AND MOTHER TONGUE

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT ENVIRONMENTALLY RESPONSIBLE
PURCHASES (Q3)



Base : Respondents who rated their level of agreement on each statement (n=809)

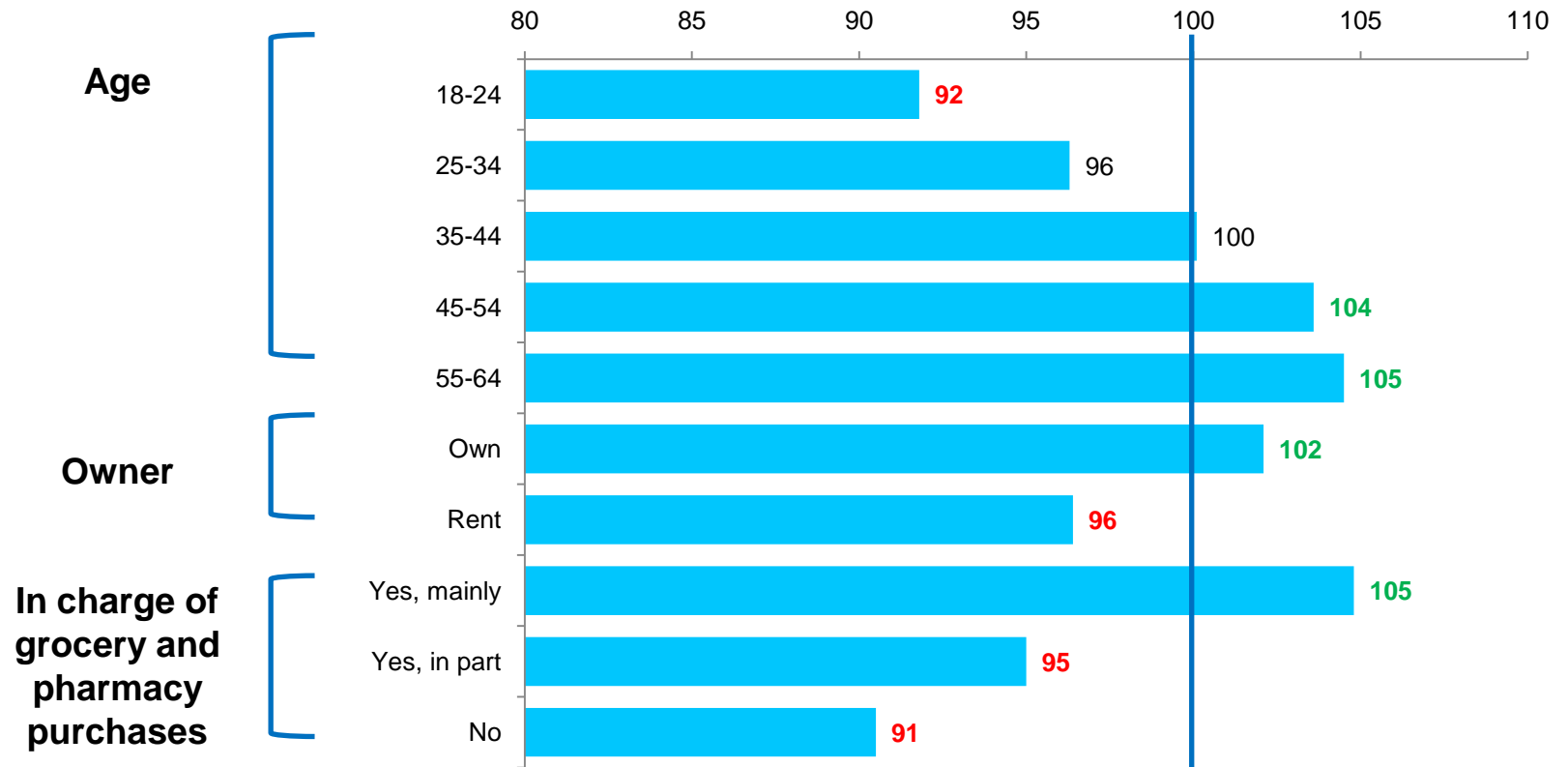


DETAILED ANALYSIS OF RESULTS

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INDICES BY AGE, OWNERSHIP AND DECISION MAKERS

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT ENVIRONMENTALLY RESPONSIBLE
PURCHASES (Q3)



Base : Respondents who rated their level of agreement on each statement (n=809)

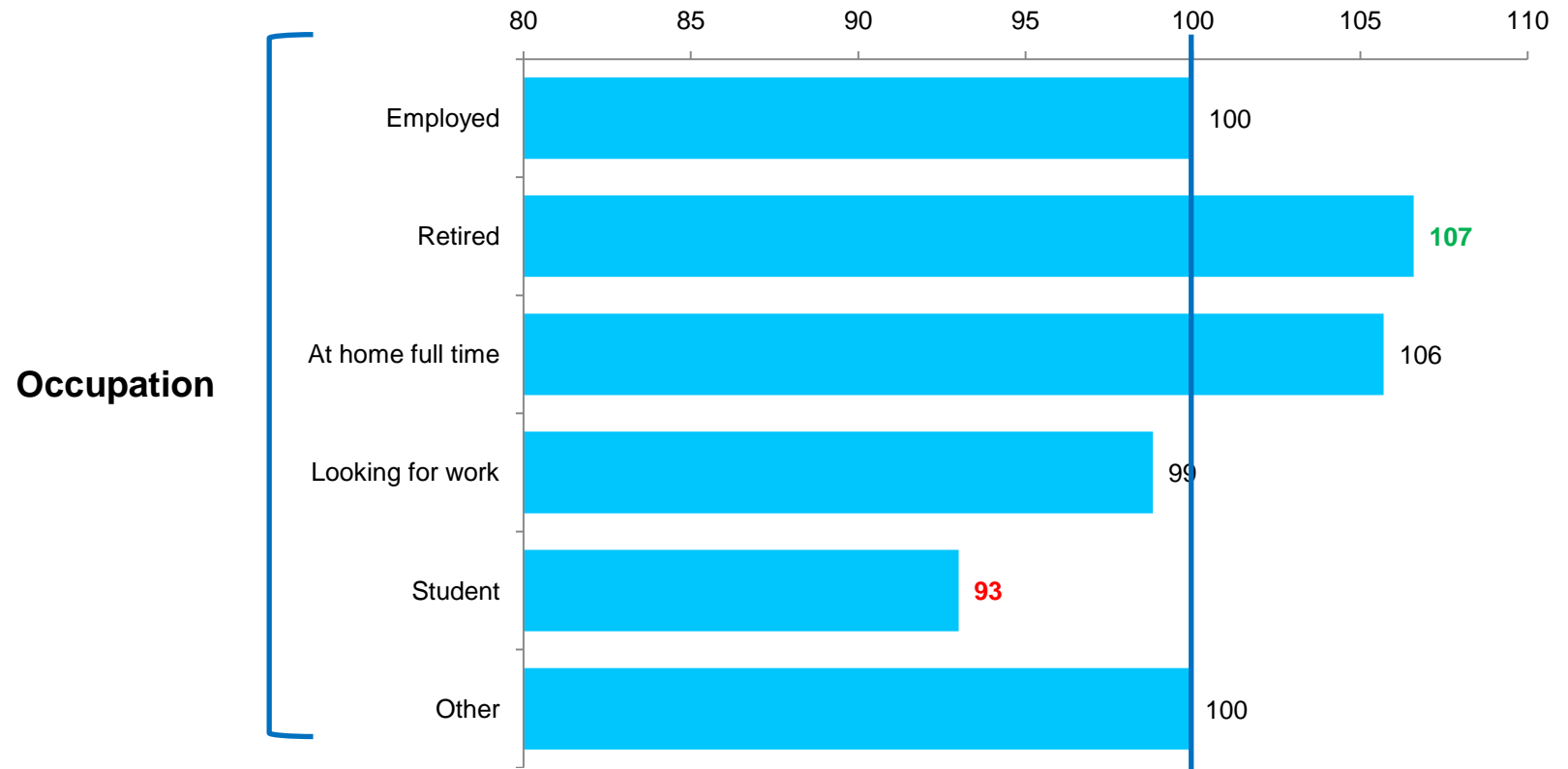


DETAILED ANALYSIS OF RESULTS

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INDICES BY OCCUPATION

LEVEL OF AGREEMENT WITH STATEMENTS ABOUT ENVIRONMENTALLY RESPONSIBLE
PURCHASES (Q3)



Base : Respondents who rated their level of agreement on each statement (n=809)



DETAILED ANALYSIS OF RESULTS

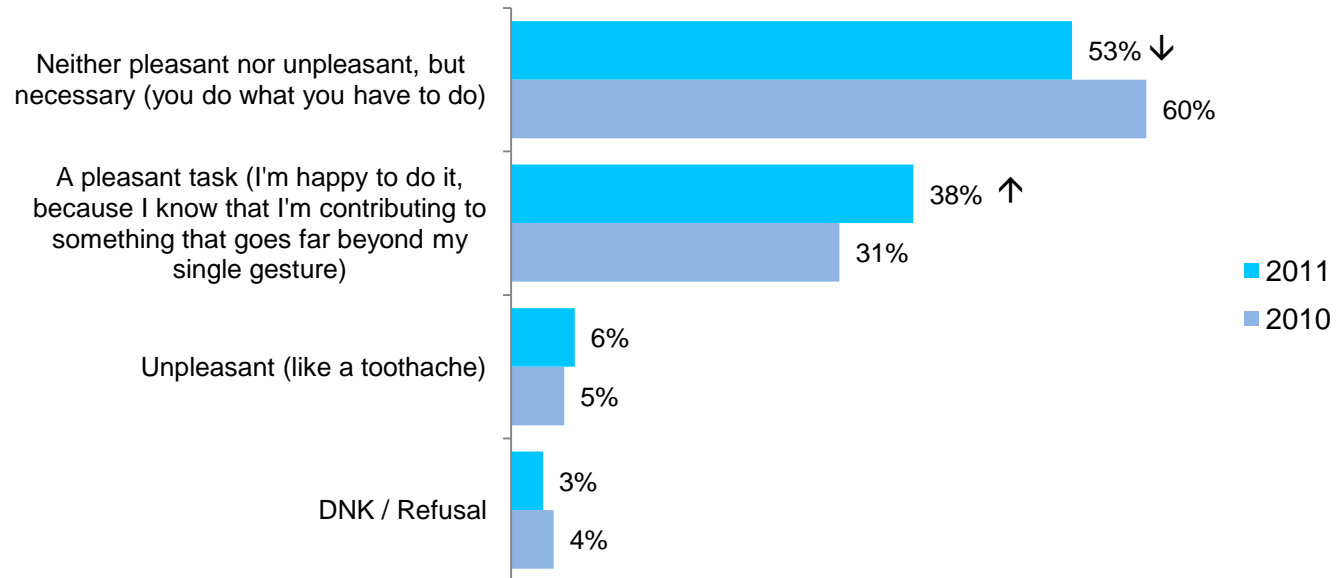
ATTITUDES TOWARD TASKS INVOLVING RECYCLING

Unsurprisingly perhaps, half of Canadians (53%) say that dealing with the recycling bin is neither a pleasant nor unpleasant task but a necessary one. The proportion of respondents who find the recycling task neither pleasant nor unpleasant is significantly higher among French speaking Canadians (59%) and people with a household income over \$100,000 (61%).

In 2011, Canadians (38%) were more likely to say that recycling was a pleasant task than they were in 2010 (31%).

Q6. For you, dealing with your recycling bin is ...?

Base: All the respondents (2011: n=1047, 2010: n=1055)



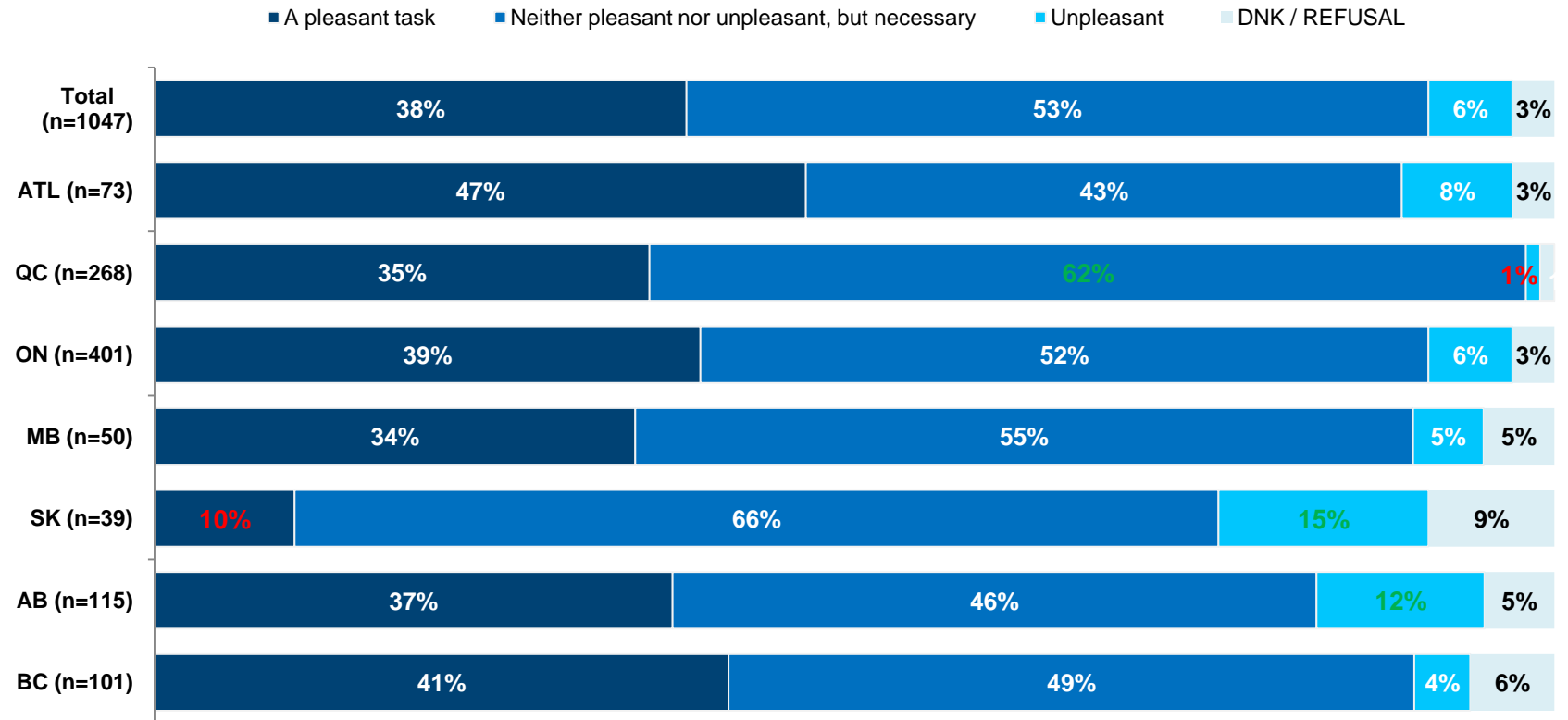


DETAILED ANALYSIS OF RESULTS

ATTITUDES TOWARD TASKS INVOLVING RECYCLING – DETAIL BY PROVINCE

Q6. For you, dealing with your recycling bin is ...?

Base: All the respondents





DETAILED ANALYSIS OF RESULTS

ATTITUDES TOWARD DIFFERENT STATEMENTS

The vast majority of Canadians are totally or somewhat in agreement that products are often over-packaged (88%) and are annoyed when there are no recycling bins in public places (83%). Agreement with both these statements has gone up since the previous study.

Q15. Please indicate the extent to which you agree or disagree with the following statements.

Base: All the respondents (2011: n=1047 2010: n=1055)

	2010	AGREE	Totally agree	Somewhat agree	DISAGREE	Somewhat disagree	Totally disagree
I find that products I buy are often over-packaged	85%	88%↑	52%	35%	9%	7%	2%
I get annoyed when I want to put a container in a recycling bin in a public place and there isn't one	78%	83%↑	45%	38%	14%	9%	5%
I feel guilty when I put a recyclable product in the garbage can	73%	76%	42%	34%	20%	14%	7%
Non-recycling packaging should be banned	68%	72%↑	36%	36%	23%	15%	8%
Environmentalism is the new religion	52%	50%	15%	35%	40%	23%	16%
I am tired of being lectured to by environmentalists	52%	45%↓	15%	30%	49%	26%	23%
Environmental groups tend to exaggerate the threats to the environment	45%	44%	14%	30%	47%	25%	22%
Sometimes I find myself arguing with people who have thrown a recyclable item into a garbage bin	34%	33%	8%	25%	63%	25%	38%
Global warming is actually a good thing for Canada	13%	11%	3%	8%	75%	24%	52%



DETAILED ANALYSIS OF RESULTS

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ATTITUDES TOWARD DIFFERENT STATEMENTS – DETAIL BY PROVINCE

Q15. Please indicate the extent to which you agree or disagree with the following statements.

Base: Respondents who are totally or somewhat agree

Totally or somewhat agree	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
I find that products I buy are often over-packaged	88%	81%	89%	88%	77%	94%	84%	92%
I get annoyed when I want to put a container in a recycling bin in a public place and there isn't one	83%	82%	86%	82%	81%	87%	78%	82%
I feel guilty when I put a recyclable product in the garbage can	76%	72%	80%	75%	71%	66%	70%	82%
Non-recycling packaging should be banned	72%	66%	84%	71%	61%	61%	63%	71%
Environmentalism is the new religion	50%	58%	47%	49%	48%	52%	51%	52%
I am tired of being lectured to by environmentalists	45%	39%	43%	43%	53%	67%	52%	44%
Environmental groups tend to exaggerate the threats to the environment	44%	30%	36%	46%	47%	56%	53%	50%
Sometimes I find myself arguing with people who have thrown a recyclable item into a garbage bin	33%	39%	28%	36%	28%	19%	28%	37%
Global warming is actually a good thing for Canada	11%	11%	9%	11%	17%	20%	17%	8%



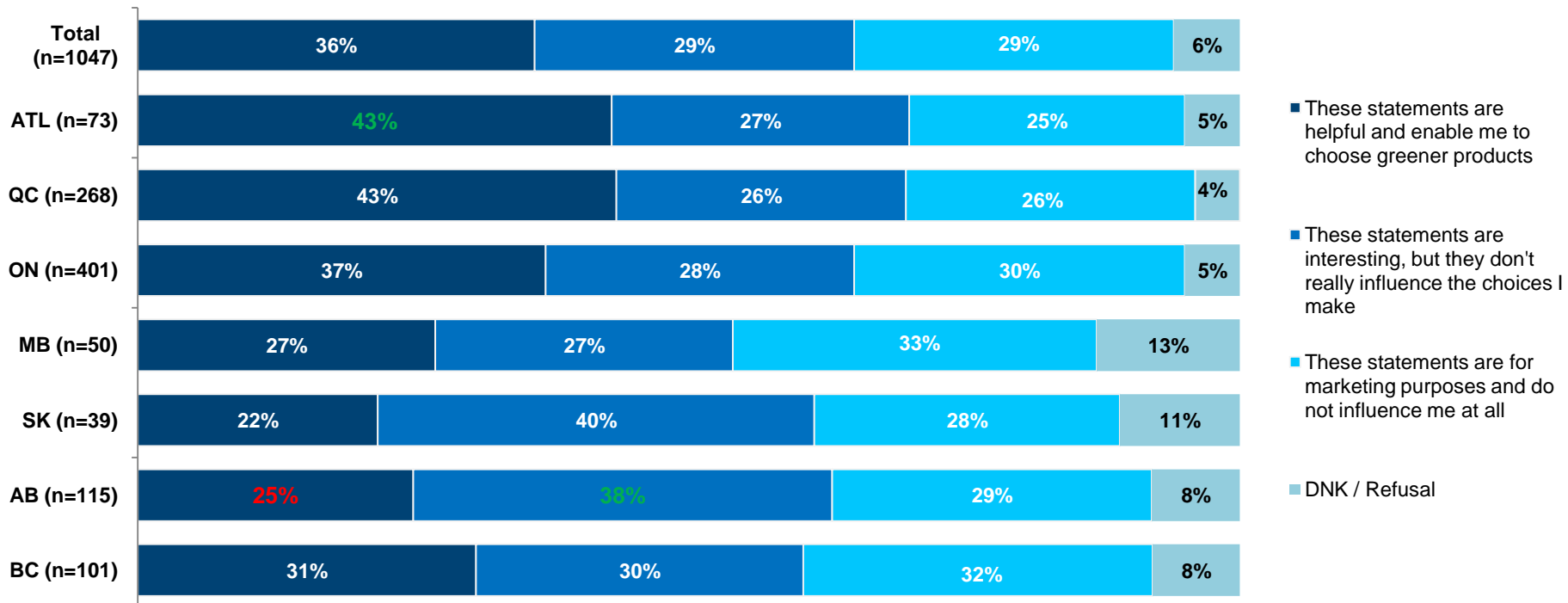
DETAILED ANALYSIS OF RESULTS

ATTITUDES TOWARD CLAIMS ON PACKAGING

The Canadian attitude toward environmental claims on packaging is equally divided between the fact that claims are helpful (36%), interesting but not influential (29%) or solely used for marketing purposes (29%).

Q16. An increasing number of household consumer products now carry claims on their packaging that they cause less harm to the environment. Which of the following statements best corresponds to your attitude when you see this kind of statement on a product?

Base: All the respondents





BEHAVIOURS



DETAILED ANALYSIS OF RESULTS

ACTIONS TO BUYING WITH AN ENVIRONMENTALLY FRIENDLY APPROACH

One Canadian out of ten buys environmentally friendly or recyclable products (11%) and avoids plastic bags (10%) when it comes to buying with an environmentally responsible approach.

Q2. As a consumer, what gesture do you personally make the most often when it comes to buying with an environmentally responsible approach?

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
I buy environmentally friendly / recycled / recyclable products / with the recycling logo	11%	9%	17%	10%	5%	6%	11%	9%
Avoid plastic bags / Bring my own reusable shopping bag	10%	7%	19%	6%	7%	8%	8%	11%
I recycle / I compost / I reuse the products / I reduce waste (general)	7%	5%	13%	6%	5%	2%	7%	3%
I buy local products	4%	3%	8%	2%	3%	0%	0%	3%
I buy products with the least amount of packaging / plastic	4%	3%	5%	4%	11%	2%	2%	5%
I buy the best priced product / I weigh the price and environmental benefit and buy accordingly	3%	0%	2%	5%	2%	0%	2%	2%
I buy organic food	2%	0%	1%	3%	3%	0%	1%	2%
I buy energy conservative products (Energy Star) / I buy efficient products (bulbs)	2%	0%	1%	2%	0%	5%	0%	4%
I buy less products / I buy only the products that I really need	2%	0%	1%	2%	4%	4%	0%	2%
I read labels / the contents (chemical additives) / Origin of the products (unspecified)	2%	2%	2%	2%	7%	1%	1%	0%
I buy biodegradable products	2%	1%	5%	0%	3%	0%	2%	0%
I don't buy bottles of water / I use tap water (with filtration) / I don't waste water	1%	0%	2%	0%	0%	2%	2%	1%
I buy chemical free products / I use natural products / I avoid environmentally damaging products	1%	2%	2%	0%	0%	0%	1%	1%
Cleaning products safe for the environment / Use natural cleaners	1%	0%	1%	1%	0%	2%	2%	1%
I do some research about the products I buy	1%	4%	0%	0%	1%	0%	3%	0%
No particular gesture	3%	1%	1%	3%	13%	10%	4%	2%
Others	8%	6%	3%	8%	5%	3%	17%	13%
DNK / Refusal	37%	57%	16%	44%	31%	57%	36%	42%



DETAILED ANALYSIS OF RESULTS

ENVIRONMENTALLY RESPONSIBLE ACTIONS AT HOME

The great majority of Canadians say they make many environmentally friendly gestures at home. The less frequent actions are composting organic materials themselves (42%), buying organic fruits and vegetables (43%) and using an electric or a manual lawn mower (27%).

Buying products made from recycled fibres (65%) is still not among the most frequently done actions by Canadians.

Q5. For each of the following gestures, please indicate how frequently you or the members of your household make that gesture at home. Is it ALWAYS, SOMETIMES, RARELY or NEVER?

Base: All the respondents (n=1047)

	TOTAL	Always	Sometimes	TOTAL	Rarely	Never	DNK / Refusal
Limit your use of electricity	90%	44%	46%	9%	7%	2%	1%
Put recyclable / compostable materials in the selective recycling bin	89%	74%	15%	8%	5%	3%	3%
Wash your clothes in cold water	86%	50%	36%	12%	9%	3%	2%
Turn down the heat a few degrees during the winter	85%	50%	35%	12%	8%	3%	4%
Buy locally-grown fruits and vegetables when possible	83%	31%	52%	15%	13%	3%	2%
Limit your use of water	83%	31%	52%	17%	13%	4%	1%
Buy energy-efficient appliances	83%	49%	34%	8%	6%	2%	9%
Limit your use of plastic bottles	79%	37%	42%	20%	14%	5%	1%
Use green or biodegradable cleaning products	72%	20%	52%	25%	19%	6%	3%
Don't use fertilizers, pesticides or chemical herbicides	67%	45%	23%	19%	12%	7%	14%
Use phosphate-free detergents	66%	31%	35%	23%	15%	8%	11%
Buy paper products (bathroom tissue, paper towels) made from recycled fibres	65%	16%	49%	30%	21%	9%	5%
Compost organic materials yourselves	42%	22%	20%	49%	15%	34%	9%
Buy organic fruits and vegetables	43%	7%	37%	54%	36%	19%	2%
Use an electric / manual lawn mower	27%	17%	10%	48%	12%	36%	25%



DETAILED ANALYSIS OF RESULTS

ENVIRONMENTALLY RESPONSIBLE ACTIONS AT HOME – DETAIL BY PROVINCE

Q5. For each of the following gestures, please indicate how frequently you or the members of your household make that gesture at home. Is it ALWAYS, SOMETIMES, RARELY or NEVER?

Base: Respondents who do the action at home always or sometimes

Always or sometimes	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Limit your use of electricity	90%	89%	87%	92%	81%	85%	88%	96%
Put recyclable / compostable materials in the selective recycling bin	89%	82%	93%	90%	90%	68%	88%	89%
Wash your clothes in cold water	86%	93%	96%	82%	80%	81%	83%	79%
Turn down the heat a few degrees during the winter	85%	84%	89%	84%	85%	83%	89%	79%
Buy locally-grown fruits and vegetables when possible	83%	91%	81%	83%	84%	68%	77%	87%
Limit your use of water	83%	80%	84%	85%	76%	79%	82%	79%
Buy energy-efficient appliances	83%	81%	85%	83%	85%	94%	80%	80%
Limit your use of plastic bottles	79%	85%	77%	78%	76%	60%	77%	92%
Use green or biodegradable cleaning products	72%	73%	77%	69%	66%	66%	76%	73%
Don't use fertilizers, pesticides or chemical herbicides	67%	62%	73%	70%	60%	43%	56%	68%
Use phosphate-free detergents	66%	70%	69%	66%	56%	58%	66%	68%
Buy paper products (bathroom tissue, paper towels) made from recycled fibres	65%	67%	75%	59%	58%	46%	58%	73%
Compost organic materials yourselves	42%	50%	30%	47%	37%	48%	38%	45%
Buy organic fruits and vegetables	43%	54%	35%	45%	35%	43%	44%	51%
Use an electric / manual lawn mower	27%	25%	20%	32%	30%	32%	28%	27%



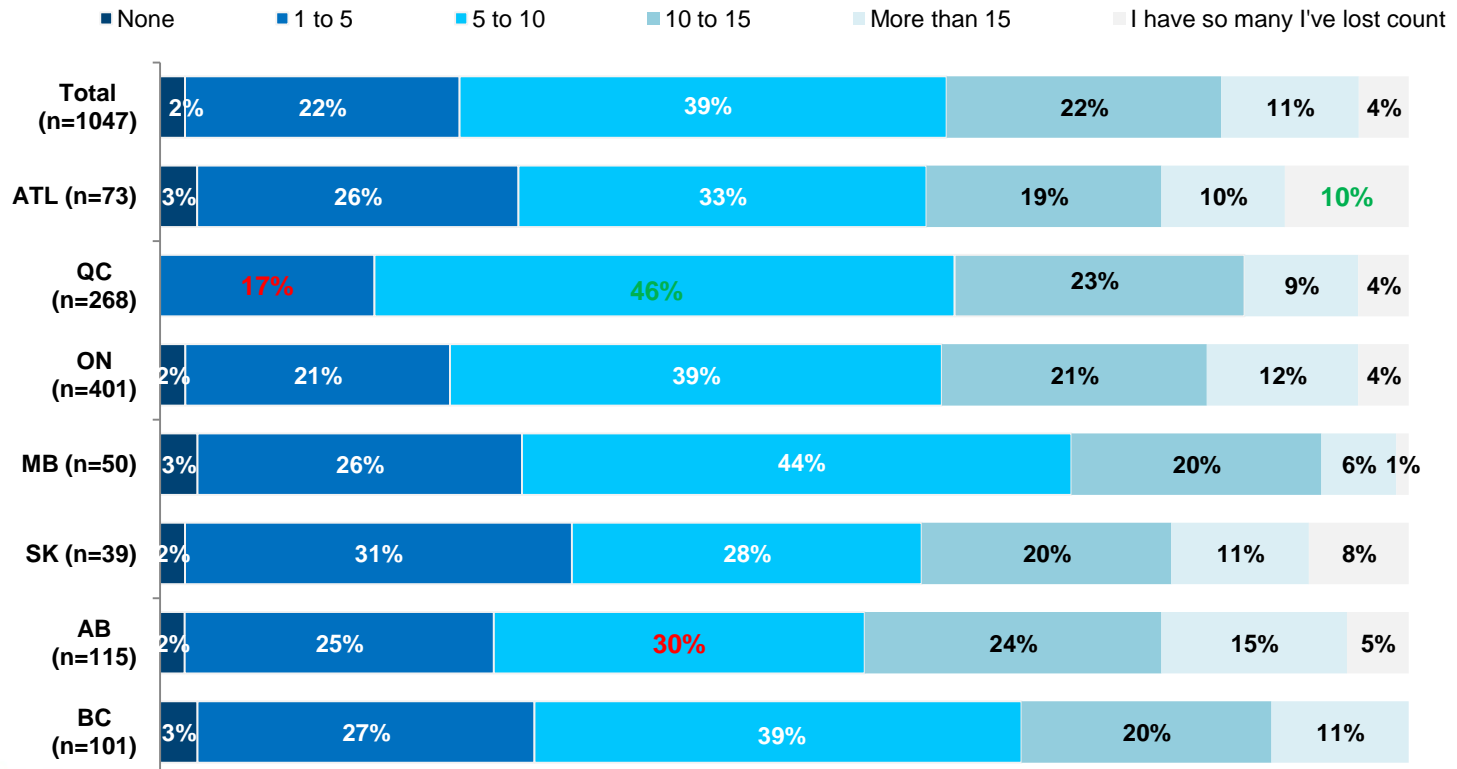
DETAILED ANALYSIS OF RESULTS

REUSABLE BAGS AT HOME OR IN THE CAR

Only 2 % of Canadians do not have any reusable bags, while 4% have so many that they have stopped counting them. If the median number of bags is given to each choice category, we can state that on average, Canadians have **nine** reusable grocery bags in their house or car.

Q17. In your opinion, how many reusable grocery bags do you have in your house or car?

Base: All the respondents





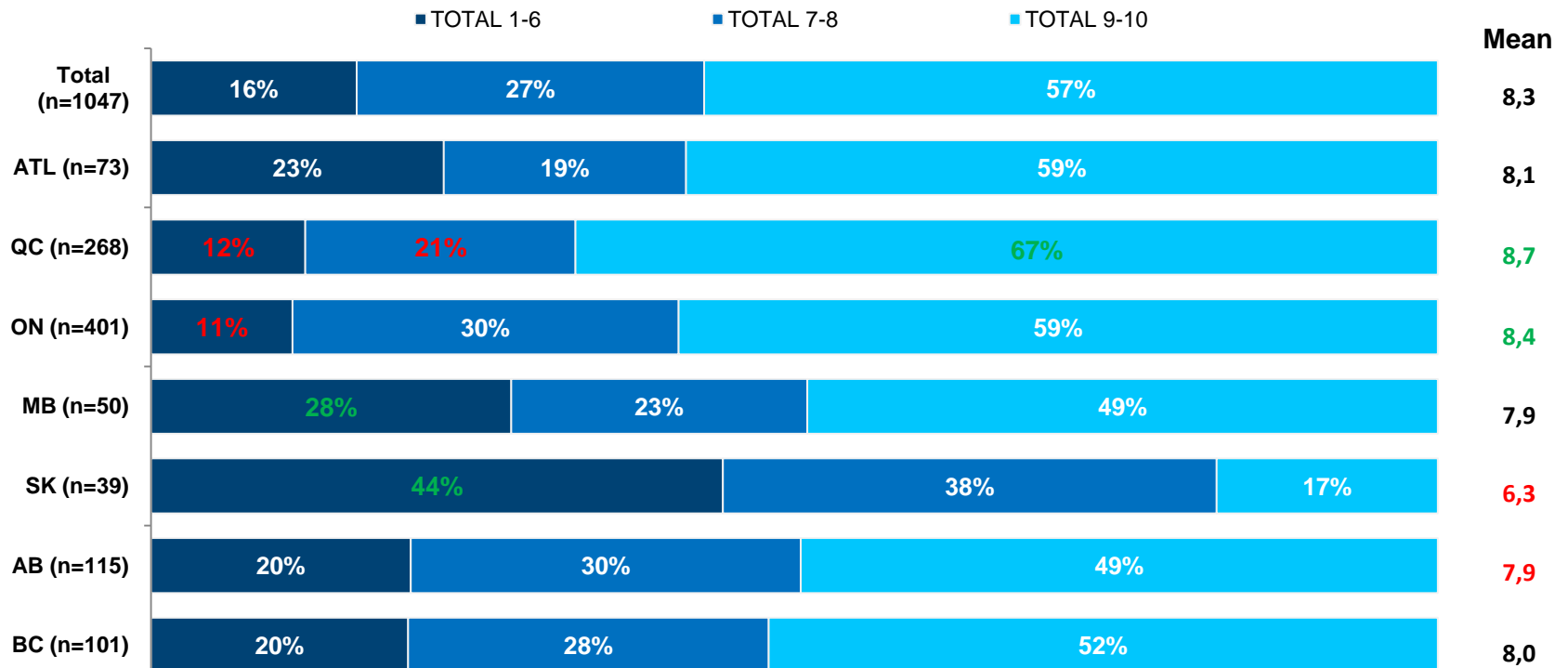
DETAILED ANALYSIS OF RESULTS

PROPENSITY TO RECYCLE

Globally, six Canadians out of ten (57%) say they recycle at home almost everything (average of 8,3 on a scale of 10). On average, Quebecers (8,7) and Ontarians (8,3) are significantly more likely to recycle at home, while residents of Alberta (7,9) and Saskatchewan (6,3) recycle significantly less.

Q7. On a scale of 1 to 10, where 10 means that you RECYCLE EVERYTHING YOU CAN and 1 means that you DO NOT RECYCLE AT ALL, how would you rate your behaviour when it comes to recycling at home?

Base: All the respondents (n=1047)





DETAILED ANALYSIS OF RESULTS

WILLINGNESS TO PAY OR PAY MORE IN ORDER TO MINIMIZE NEGATIVE IMPACTS

Six Canadians out of ten (63%) are willing to pay, or to pay more, to stop using pesticides and herbicides on their lawn. Women (67%) French speaking Canadian (74%) and people at home full time (78%) are significantly more disposed to pay or to pay more to stop using pesticides and herbicides on their lawn in order to minimize their impact on the environment.

Half of Canadians are willing to pay or to pay more to buy only locally grown fruits and vegetables (51%), drive the car of their choice (50%) and for their water usage (49%).

There are more Canadians not willing to pay or pay more (46%) to only buy products made from recycled materials than those who are willing to do so (39%).

Q18. Would you be willing to pay, or pay more, for the following to minimize the negative impact that your lifestyle may have on the environment?

Base: All the respondents (n=1047)

	Yes	No	DNK / Refusal
Stop using pesticides and herbicides on your lawn	63%	25%	12%
Buy only locally grown fruits and vegetables	51%	41%	8%
Drive the car of your choice	50%	35%	14%
Water usage (e.g. watering your lawn in summer)	49%	40%	11%
Buy clothing made only from natural fibres (cotton, wool, linen, silk, etc.)	40%	46%	15%
Buy only products made from recycled materials	39%	46%	14%



DETAILED ANALYSIS OF RESULTS

WILLINGNESS TO PAY OR PAY MORE IN ORDER TO MINIMIZE NEGATIVE IMPACTS – DETAIL BY PROVINCE

Q18. Would you be willing to pay, or pay more, for the following to minimize the negative impact that your lifestyle may have on the environment?

Base: Respondents who are willing to pay, or pay more

Willing	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Stop using pesticides and herbicides on your lawn	63%	60%	74%	63%	54%	37%	52%	63%
Buy only locally grown fruits and vegetables	51%	53%	49%	51%	46%	42%	52%	54%
Drive the car of your choice	50%	47%	55%	51%	38%	57%	46%	45%
Water usage (e.g. watering your lawn in summer)	49%	43%	55%	49%	39%	42%	50%	45%
Buy clothing made only from natural fibres (cotton, wool, linen, silk, etc.)	40%	40%	32%	42%	31%	34%	44%	46%
Buy only products made from recycled materials	39%	41%	46%	38%	32%	23%	41%	35%

INFLUENCES



DETAILED ANALYSIS OF RESULTS

INFLUENCE IN RECYCLING HABITS

16% of Canadians say that it is the recycling habits of other family members that influence them the most. People with a household income between \$70,000 and \$99,000 (22%) and over \$100,000 (23%), students (24%), 18 to 24 year olds (23%) and people with minor children in the household (20%) are significantly more likely to be influenced by family members.

One out of ten Canadians (9%) say their own recycling habits influence them the most. English speaking Canadians (11%) are significantly more likely to consider themselves as environmentally conscious.

Almost half of respondents (46%) were unable to answer this question.

Q11. Whose recycling habits influence you the most?

Base: All the respondents

	TOTAL (n=1047)	ATL. (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Other family members / It's a family affair	16%	12%	18%	16%	23%	11%	18%	9%
Myself / I am environmentally conscious	9%	5%	7%	10%	12%	5%	11%	14%
My child / Children / I think about their future	6%	10%	12%	3%	4%	9%	2%	3%
The recyclable container availability / The blue / green box	3%	7%	1%	4%	7%	0%	3%	3%
Friend(s)	2%	5%	2%	2%	0%	0%	1%	5%
David Suzuki	2%	8%	1%	1%	0%	1%	0%	1%
Neighbours / Roommates	1%	0%	0%	2%	0%	4%	0%	2%
Co-workers	1%	0%	2%	1%	0%	3%	0%	0%
The law / Government / The province / The city / The community	1%	2%	0%	1%	1%	3%	0%	0%
No one	3%	4%	3%	3%	2%	1%	4%	3%
Other	10%	8%	9%	7%	9%	16%	11%	19%
DNK / Refusal	46%	39%	45%	50%	43%	47%	50%	39%



DETAILED ANALYSIS OF RESULTS

INFLUENCE OF HOUSEHOLD IN RECYCLING HABITS

While only one Canadian out of ten (9%) says that it is their own recycling habits that influence them the most and that 16% think it is a family affair (16%), two out of three Canadians (65%) state that they are the person putting the most effort into recycling in their household.

Women (71%), people 45 and 54 years old (70%), decision makers (grocery and drugstore purchases) (75%) and stay at home respondents (85%) are significantly more likely to be the person in their household putting the most effort into recycling.

Q9. Which person in your household puts the most effort into recycling?

Base: All the respondents

	2010 (n=1055)	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)
Me	66%	65%	64%	68%	65%	65%	56%	61%
My partner	18%	15%	8%	15%	15%	13%	22%	23%
Other people I live with	5%	6%	6%	4%	9%	6%	2%	3%
I live alone	4%	6%↑	6%	7%	5%	10%	6%	4%
My children	2%	1%	0%	2%	1%	0%	0%	0%
No one	5%	3%	9%	2%	2%	0%	6%	3%
DNK / Refusal	-	5%	7%	2%	4%	6%	7%	6%



DETAILED ANALYSIS OF RESULTS

INFLUENCE OF CHILDREN IN RECYCLING HABITS

Among respondents who have children living at home, 73% say their children recycling habits have a positive influence on them.

Q10. If you have children, do their recycling habits influence you?

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
TOTAL POSITIVE	37%	40%	41%	36%	33%	35%	41%	28%
Great positive influence	17%	22%	21%	17%	10%	13%	20%	10%
Slight positive influence	19%	18%	19%	19%	23%	22%	22%	17%
TOTAL NEGATIVE	4%	3%	2%	3%	7%	4%	2%	10%
Slight negative influence	4%	3%	2%	3%	5%	4%	2%	10%
Great negative influence	0%	0%	0%	0%	2%	0%	0%	0%
I don't have children living at home	49%	50%	48%	48%	53%	44%	46%	57%
DNK / Refusal	10%	6%	9%	12%	7%	17%	10%	6%

Base: Respondents with children living at home

	TOTAL (n=443)	ATL (n=33)	QC (n=113)	ON (n=170)	MB (n=21)*	SK (n=17)*	AB (n=50)	BC (n=39)
TOTAL POSITIVE	73%	80%	79%	70%	66%	77%	64%	47%
Great positive influence	34%	43%	42%	33%	22%	36%	24%	23%
Slight positive influence	38%	37%	38%	37%	44%	40%	40%	24%
TOTAL NEGATIVE	8%	7%	4%	6%	11%	4%	23%	9%
Slight negative influence	7%	7%	4%	6%	9%	4%	23%	7%
Great negative influence	0%	0%	0%	1%	2%	0%	0%	1%
DNK / Refusal	20%	13%	17%	24%	23%	19%	14%	45%

*The small sample size (n<30) requires caution in interpreting results.



DETAILED ANALYSIS OF RESULTS

INFLUENCE OF A PUBLIC FIGURE IN RECYCLING HABITS

Spontaneously, David Suzuki is the public figure that first comes to the mind of 36% of Canadians when they think of the environment.

People with a university education (44%) and English Canadians speakers (41%) are significantly more likely to think of David Suzuki. Mr. Suzuki is not as well known by Quebecers.

Q12. When you think of the environment, what public figure comes to mind first?

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
David Suzuki	36%	44%	14%	44%	32%	48%	35%	45%
Al Gore	6%	7%	2%	7%	8%	1%	10%	7%
Steven Guilbeault	2%	0%	7%	0%	0%	0%	0%	0%
Roy Dupuis	1%	0%	4%	0%	0%	0%	0%	0%
Elizabeth May	1%	3%	1%	1%	0%	0%	1%	1%
Hubert Reeves	1%	0%	3%	0%	0%	0%	0%	0%
Jack Layton	1%	0%	4%	1%	0%	0%	0%	0%
Laure Waridel	1%	0%	3%	0%	0%	0%	0%	0%
Richard Desjardins	1%	0%	3%	0%	0%	0%	0%	0%
Stephen Harper	1%	1%	0%	0%	0%	0%	4%	1%
Green Party	1%	1%	0%	1%	0%	0%	0%	2%
No one	3%	2%	6%	1%	0%	0%	2%	7%
Other	7%	4%	12%	5%	9%	8%	5%	8%
DNK / Refusal	39%	38%	42%	40%	51%	43%	42%	30%



DETAILED ANALYSIS OF RESULTS

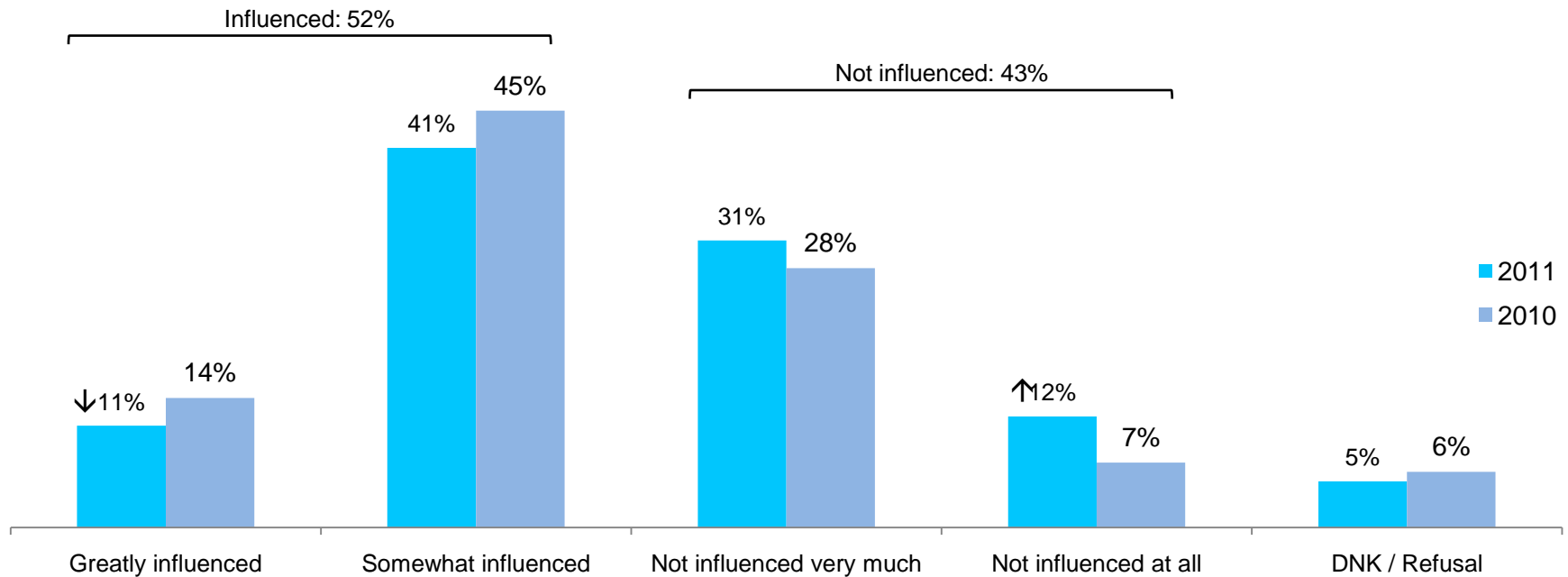
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INFLUENCE OF THE ENVIRONMENTAL GESTURES MADE BY PUBLIC PLACE OWNERS

Half of Canadians (52%) are greatly or somewhat influenced by the environmental actions taken by the people who run public places. In 2011, Canadians are significantly less likely to be greatly influenced by the environmental actions made by public places owners than in 2010 (11 vs. 14%).

Q19. To what extent is your perception of the various public places you visit (shopping centres, movie theatres, entertainment venues, etc.) influenced by the environmental gestures made by the people who run these facilities? By environmental gestures, we mean factors such as the availability of recycling bins, the use of green cleaning products, plates and cutlery made from recyclable or compostable materials, etc.

Base: All the respondents (2011: n=1047, 2010: n=1055)





DETAILED ANALYSIS OF RESULTS

INFLUENCE OF THE ENVIRONMENTAL GESTURES MADE BY PUBLIC PLACES OWNERS – DETAIL BY PROVINCE

Q19. To what extent is your perception of the various public places you visit (shopping centres, movie theatres, entertainment venues, etc.) influenced by the environmental gestures made by the people who run these facilities? By environmental gestures, we mean factors such as the availability of recycling bins, the use of green cleaning products, plates and cutlery made from recyclable or compostable materials, etc.

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
TOTAL YES	52%	59%	50%	54%	39%	34%	46%	53%
Greatly influenced	11%	11%	11%	10%	10%	10%	14%	10%
Somewhat influenced	41%	48%	39%	45%	30%	24%	32%	43%
TOTAL NO	43%	32%	46%	41%	47%	55%	51%	41%
Not influenced very much	31%	25%	32%	30%	31%	36%	35%	29%
Not influenced at all	12%	8%	14%	11%	16%	19%	16%	12%
DNK / Refusal	5%	8%	4%	5%	13%	11%	3%	6%

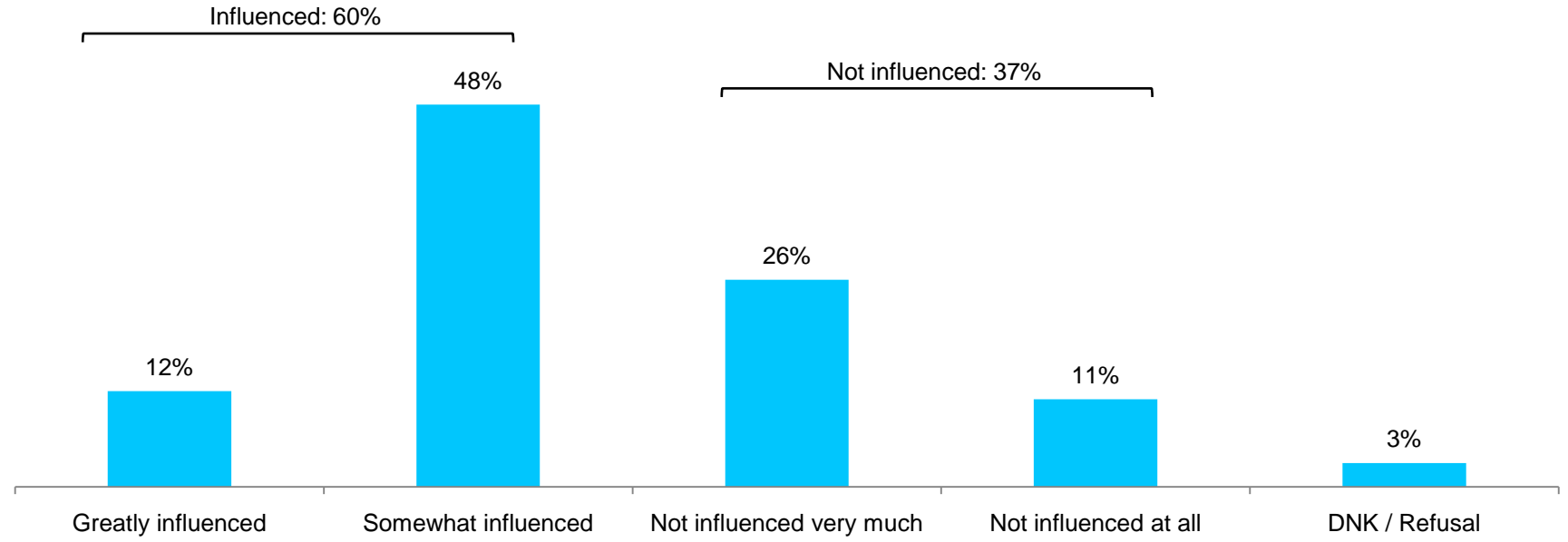


DETAILED ANALYSIS OF RESULTS

INFLUENCE OF THE ENVIRONMENTAL STEPS TAKEN BY MANUFACTURER

Six out of ten Canadians (60%) are greatly or somewhat influenced by the environmental steps taken by a manufacturer or merchant in their decision to buy or not to buy a product. This is particularly true of women (65%), respondents aged 55 to 64 (68%), people with a university education (66%) and decision makers of grocery and drugstore purchases (64%) who are significantly more influenced by environmental actions taken by manufacturer in their choice of whether or not to buy a product.

Q20. To what extent do the environmental steps taken by a manufacturer or merchant influence your decision to buy its products?
Base: All the respondents (n=1047)





DETAILED ANALYSIS OF RESULTS

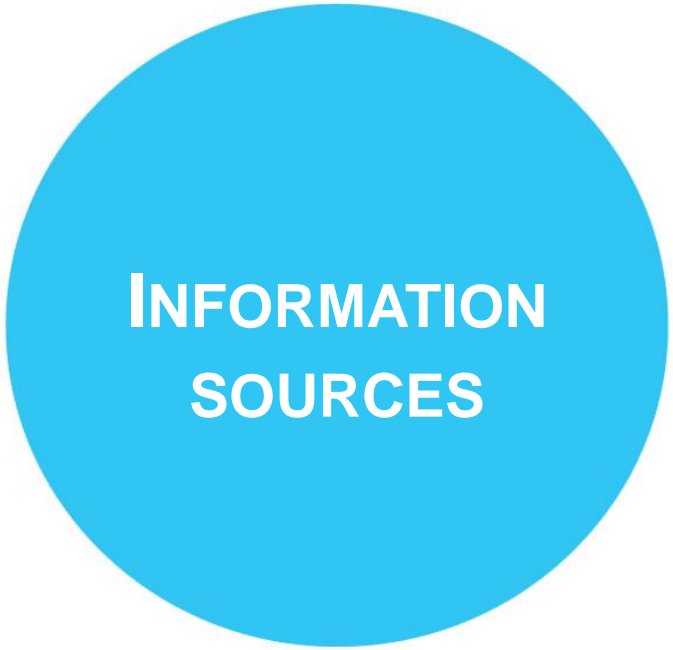
INFLUENCE OF THE ENVIRONMENTAL STEPS TAKE BY MANUFACTURER – DETAIL BY PROVINCE

While residents of the Atlantic provinces and British-Columbia state they are more likely influenced by the environmental steps taken by a manufacturer or merchant in their decision to buy or not to buy a product, residents of Saskatchewan are not as likely to be.

Q20. To what extent do the environmental steps taken by a manufacturer or merchant influence your decision to buy its products?

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
TOTAL YES	60%	71%	59%	60%	54%	37%	52%	69%
Greatly influenced	12%	17%	12%	13%	9%	5%	10%	12%
Somewhat influenced	48%	55%	47%	47%	45%	32%	42%	57%
TOTAL NO	37%	27%	39%	36%	41%	60%	43%	28%
Not influenced very much	26%	14%	28%	26%	29%	44%	29%	22%
Not influenced at all	11%	13%	10%	10%	12%	16%	15%	6%
DNK / Refusal	3%	2%	2%	4%	4%	3%	4%	3%



INFORMATION SOURCES



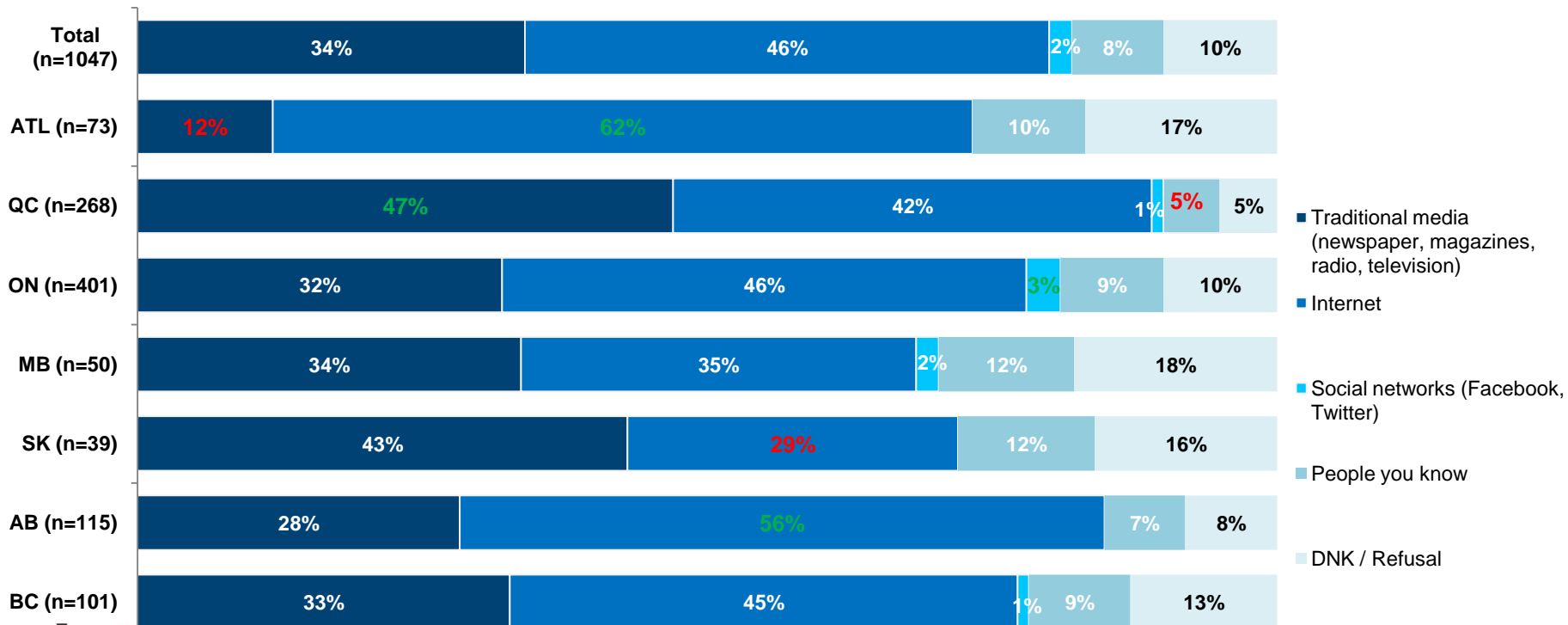
DETAILED ANALYSIS OF RESULTS

INFORMATION SOURCES

Nearly half of Canadians (46%) get their information on environmental issues on the Web and one out of three (34%) through traditional media. People aged 45 to 54 (41%) and 55 to 64 (42%), French speaking Canadians (49%), residential owners (36%) and retired respondents (44%) are more likely to get their environmental information through traditional media.

Q13. Where do you go for information about the environment and eco-friendly gestures?

Base: All the respondents (n=1047)





DETAILED ANALYSIS OF RESULTS

SPECIFIC INFORMATION SOURCE

As the table below indicates, most Canadians do not get their information about the environment through specialized sources. Indeed, the Internet and Google website is the “specific” source of information that was named most by Canadians (14%).

Q14. Is there one particular source you go to when looking for information about the environment?

Base: All the respondents

	TOTAL (n=1047)	ATL (n=73)	QC (n=268)	ON (n=401)	MB (n=50)	SK (n=39)	AB (n=115)	BC (n=101)
Internet (unspecified) / Google	14%	8%	14%	15%	17%	13%	20%	11%
Television (unspecified) / News on TV / Report / Weather Network	3%	3%	7%	1%	0%	10%	6%	1%
Government (unspecified) / Government websites / Environment Canada	2%	2%	1%	3%	5%	0%	0%	1%
News (unspecified)	1%	0%	0%	1%	2%	0%	0%	2%
Newspaper	1%	1%	1%	2%	3%	0%	3%	1%
Fondation David Suzuki / David Suzuki	1%	0%	2%	0%	0%	0%	0%	2%
My city / Environment laws of my city (recycling depot) / EcoQuartier	1%	0%	3%	0%	0%	0%	3%	1%
Other websites (including Facebook) / Blogs	1%	4%	1%	1%	0%	0%	2%	1%
From family, friends, colleagues	1%	0%	1%	2%	0%	0%	1%	0%
Magazines / Books	1%	0%	1%	0%	0%	0%	1%	1%
Environmental organisation/ Greenpeace / WWF / Équiterre	1%	2%	1%	1%	2%	0%	0%	0%
Media (unspecified)	1%	0%	1%	0%	0%	0%	0%	2%
No one particular source	15%	21%	19%	13%	22%	18%	5%	13%
Other	3%	5%	2%	3%	0%	0%	5%	2%
DNK / Refusal	54%	54%	44%	57%	49%	59%	56%	63%



PROFILE OF RESPONDENTS



PROFILE OF RESPONDENTS

53

	TOTAL (n=1047)
Gender	
Male	49%
Female	51%
Age	
between 18 and 24 years of age	14%
between 25 and 34 years of age	20%
between 35 and 44 years of age	24%
between 45 and 54 years of age	24%
between 55 and 64 years of age	18%
Province	
Atlantic	7%
Quebec	24%
Ontario	39%
Manitoba	4%
Saskatchewan	3%
Alberta	10%
British-Colombia	13%
Language	
French	22%
English	58%
Other	21%

	TOTAL (n=1047)
Household income	
less than \$30,000	15%
between \$30,000 and \$49,999	17%
between \$50,000 and \$69,999	17%
between \$70,000 and \$99,999	18%
\$100,000 or more	20%
Education	
Elementary / High School	33%
College	29%
University	37%
Occupation	
Employed	63%
Retired	9%
At home full time	7%
Looking for work	4%
Student	11%
Other	3%
Children in the household	
Yes	40%
No	60%

	TOTAL (n=1047)
Owner	
Owner	15%
Tenant	17%
In charge of grocery and pharmacy purchases	
Yes, mainly	57%
Yes, in part	34%
No	9%
Number of people in household	
Mean	2,9
Number of children in household	
Mean	1,8



APPENDIX



APPENDIX

CONTACT INFORMATION

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For more information about this study, please contact :

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