



Greenbelt Foundation Post-Advertising Campaign Awareness Measurement

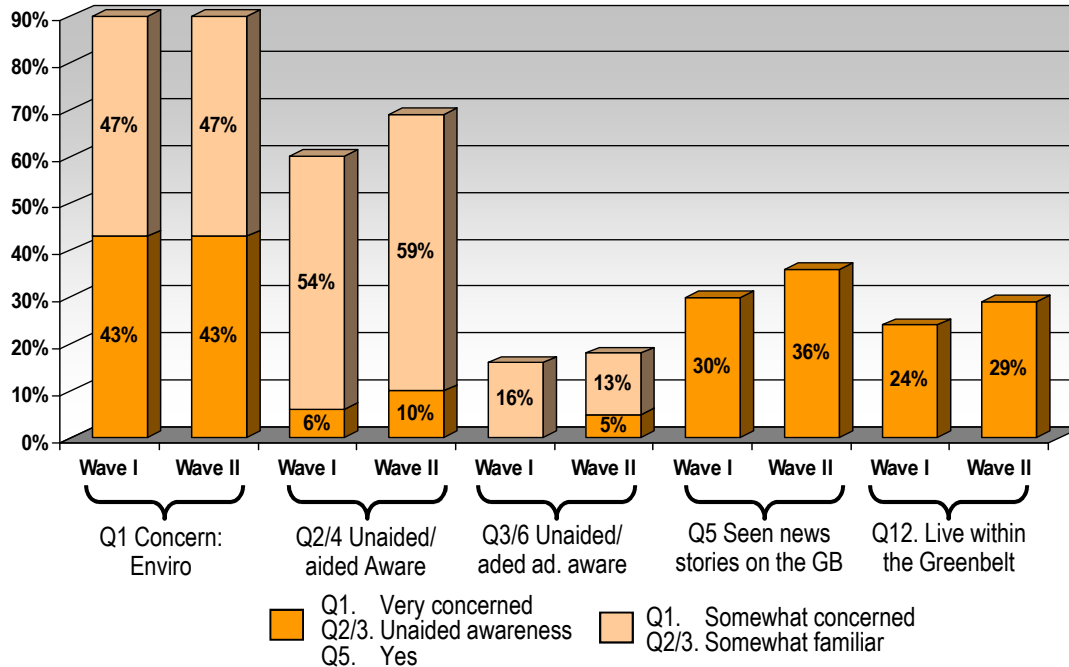
Summary prepared by:



Management Summary – Nov 2005



Summary of Post-Advertising Campaign Findings



- Q1: Between Wave I and Wave II, identical proportions say they are very (43%) or somewhat (47%) concerned about the state of the natural environment in Ontario.
- Q2/4. Unaided awareness of the Greenbelt has increased significantly from 6% to 10%. Total aided and unaided awareness has increased from 60% to 69%.
- Q3/6. Unaided advertising recall is 5%, with total advertising recall now at 18% (16% claimed aided awareness in Wave I)
- Q5. 36% say they have seen news stories in the media describing the Greenbelt, up significantly from 30% in Wave I.
- Q12. The proportion believing they live in a community within the Greenbelt has increased significantly from 24% to 29%.
- Q14. 18% think the main goal or benefit of the Greenbelt is to protect wildlife/habitats, followed by limiting urban sprawl (14%), protecting farmlands (13%), and restricting growth/development (13% - up sig.). Fewer were unable to answer (46% - down sig.).
- Q15. While Limiting economic development (8%) is up significantly, the other potential drawbacks were mentioned with similar frequency as in Wave I.

Q14. Main Goals	Wave I	Wave II
	Protect wildlife/habitats	12
Limit urban sprawl	12	14
Protect farmlands	10	13
Protect waterways	8	13
Restrict growth/development	10	12
Protect greenspace/Greenbelt	4	6
Preserve/protect the environment	4	6
Reduce pollution	6	5
Other	20	16
Don't know/no answer	54	46

Q15. Drawbacks	Wave I	Wave II
	Limit/drive away econ dev.	4
Decreased land values	2	3
Reduced freedom to use property	3	3
Unfair to farmers/landowners	3	2
Fewer homes available	2	2
Doesn't go far enough	1	2
Politics of implement	2	2
Increased house prices	1	2
Cost to implement	2	2
Other	7	10
None	7	9
Don't know/no answer	69	63



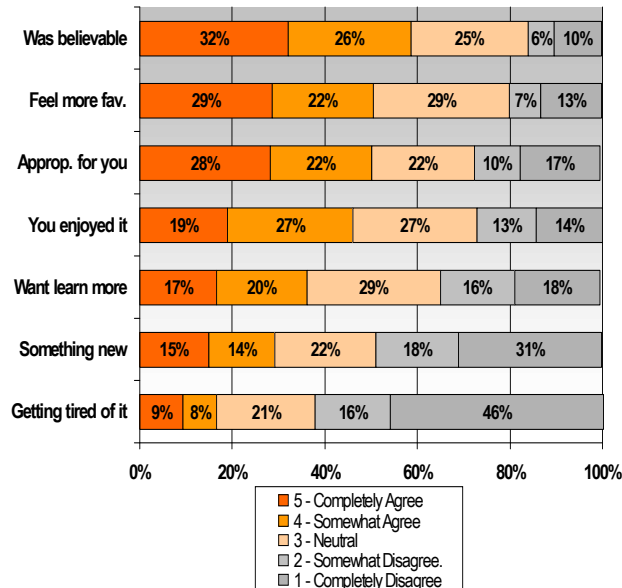
Summary of Post-Advertising Campaign Findings

Q7. Where saw Ad.	Wave II
Radio	45
Newspapers	29
Television	26
Magazines	3
Sign on 400/401/QEW	3
Other	5
Don't know/no answer	10

Q8. Describe Ad.	Wave II
Child wants to see a deer	21
"Where do apples come from"	13
"Where does water come from"	12
Awareness/existence of GB	10
GB needs to be protected	8
Stop development on GB	5
Location of GB	5
Saw on TV	4
Heard on radio	3
Other	5
Don't know/no answer	21

Q9. Main Msg.	Wave II
Public awareness campaign	14
GB will protect wildlife	13
GB will protect water system	8
GB needs to be preserved	8
Stop development on GB	6
GB will protect agriculture	6
GB will protect trees	5
Other	6
Don't know/no answer	6

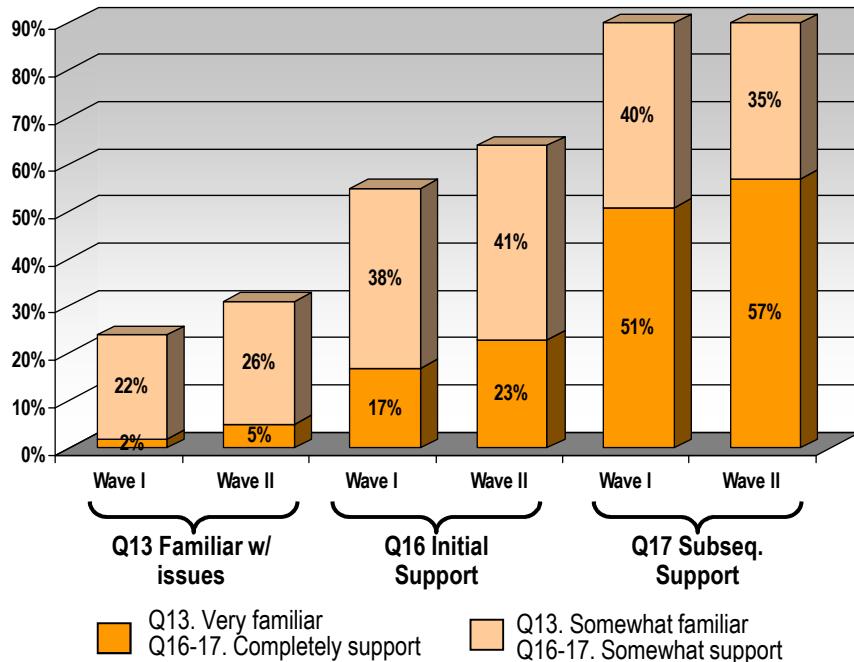
Q10. Advertising Attributes



- Q7: Radio (45%) and television (29%) are where most saw advertising for the Greenbelt. Erroneously, 26% thought they saw ads on TV.
- Q8. Respondents were able to describe the deer spot (21%), the apples spot (19%) and the water spot (12%) most accurately
- Q9. A wide range of messages were interpreted from the advertising. 14% thought it was a general public awareness campaign. Protecting wildlife (13%), protecting the water system (8%), and preserving the Greenbelt (8%) were other frequent mentions.
- Q10. The advertising scored highly on most measures including believable (58%), feeling more favourable (51%) and being appropriate for people like you (50%). Only 17% say they are getting tired of it.
- Q11. One third (33%) of those who recalled any advertising say they discussed it with family, friends or co-workers.



Summary of Pre-Advertising Campaign Findings



- Q13. 31% are very (5%) or somewhat (26%) familiar with the issues surrounding the Greenbelt, up significantly from 24% in Wave I.
- Q16. With greater awareness and familiarity comes greater levels of support. Two-thirds (64%) either completely (23%) or somewhat support (41%) the Greenbelt, up significantly from 55% in Wave I.
- Q17. Based on the description, support jumps dramatically with a majority (57% -- up significantly from 51%) now completely supporting it, and 35% somewhat supporting it.
- A pattern seen in Wave I, after hearing the statement, 53% of those who said they somewhat supported the Greenbelt changed their answer to complete support, while 46% who somewhat opposed it, changed to somewhat supporting it
- Q13. Unchanged from Wave I, 28% thought the most important benefit was protecting the natural water system, followed by protecting wildlife (21%) and preserving agriculture (19%).

Q16. Initial Support

Q17. Subsequent Support	Total %	Q16. Initial Support				
		Completely support	Somewhat support	Somewhat oppose	Completely oppose	Don't know
	100	23	41	5	2	29
Completely support	57	89	53	8	19	47
Somewhat support	35	10	43	46	14	41
Somewhat oppose	4	0	2	35	24	4
Completely oppose	2	0	1	10	38	2
Don't know/no answer	2	0	0	0	5	6

Q19. Benefits of the Greenbelt

	Wave I	Wave II
Protecting the natural water system	27	28
Protecting wildlife habitats	21	21
Preserving agricultural lands	21	19
Limiting urban sprawl	14	14
Creating a single, continuous beltway	9	11
Providing recreational/tourism ops	4	4
Don't know/no answer	3	4



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Objectives

Objectives:

- The objectives of the first wave of this study were to establish a baseline measurement of awareness of the Greenbelt prior to the launch of a major advertising campaign in the Golden Horseshoe area on October 19th.
- The baseline measures will be compared to in a second wave of measurement in December, 2005. These measures will be compared to see which changed in a statistically significant fashion as a result of the advertising and media awareness campaign.



Methodology

Methodology:

- A total of 1,000 interviews were conducted by telephone between December 7-13, 2005. A sample of this size can be considered accurate to within +/-3.1 percentage points, 19 times out of 20. A stratified sampling was employed with quotas set for each municipality. The breakdown of the sample plan appears below:

Count	Total	Urban	Rural
Toronto	200	200	0
York	90	72	18
Durham	60	48	12
Dufferin	40	33	8
Peel	70	56	14
Halton	50	40	10
Waterloo	50	40	10
Wellington	50	40	10
Brant	40	32	8
Hamilton	60	48	12
Niagara	50	40	10
Northumberland	35	15	19
Kawartha	35	28	7
Peterborough	40	30	10
Simcoe	50	34	16
Grey	40	18	22
Bruce	40	5	35
	1000	779	221

- Results in this report are analyzed by unweighted data, highlighting key differences by respondent demographics and awareness of the Greenbelt.



Demographic Profiles:

	Greenbelt Wave I	Greenbelt Wave II	Typical Ont. Sample		Greenbelt Wave I	Greenbelt Wave II	Typical Ont. Sample
Gender:				Education:			
Male	50%	50%	48%	HS/less	28%	27%	39%
Female	50%	50%	52%	College/voc.	26%	27%	28%
Age:				University	31%	27%	29%
18-29	13%	10%	20%	Post-Grad	13%	17%	+
30-49	40%	35%	38%	HH Income:			
50+	46%	52%	42%	<\$40,000	26%	27%	28%
Marital:				\$40-\$60k	17%	18%	15%
Single	21%	18%	21%	\$60-\$80k	14%	12%	16%
Married/tog.	59%	61%	59%	\$80k+	26%	29%	19%
Widowed	9%	10%	7%	Refused	17%	14%	11%
Sep./Div.	10%	10%	9%	Tenure:			
Children:				Own	74%	76%	65%
None	67%	67%	64%	Rent	23%	22%	34%
One	13%	11%	12%	Born in:			
Two	16%	14%	13%	Ontario	64%	64%	N/A
Three+	5%	8%	8%	Oth. Prov.	9%	10%	N/A
				Outside Cda	26%	25%	N/a

Comparable Statistics Canada data was not easily available for comparing these demographic patterns. Instead, the Greenbelt sample is compared to that of a typical Ontario-wide omnibus (which weights to StatsCan data). The Greenbelt sample differs from a typical Ontario-wide sample in that:

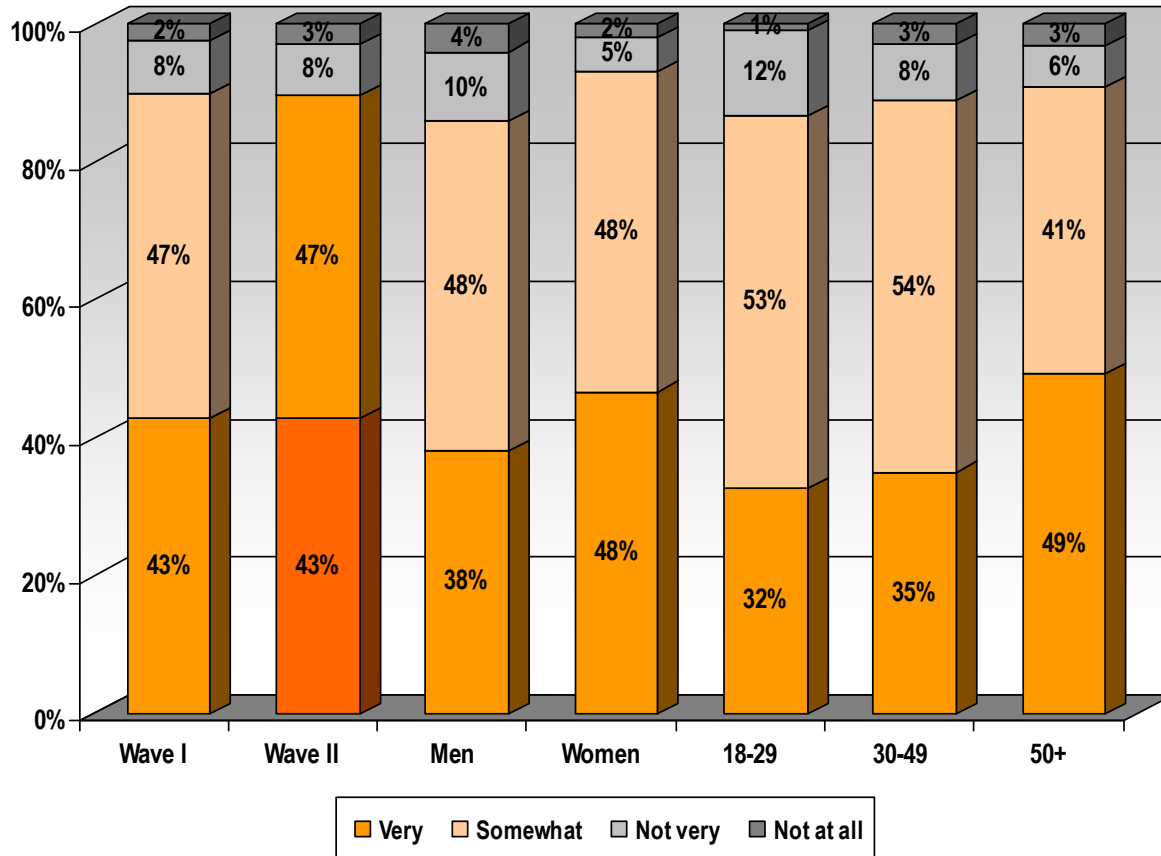
- Respondents are somewhat older, and fewer have children.
- Their education and household incomes are higher
- More own rather than rent their residences.



Summary Findings



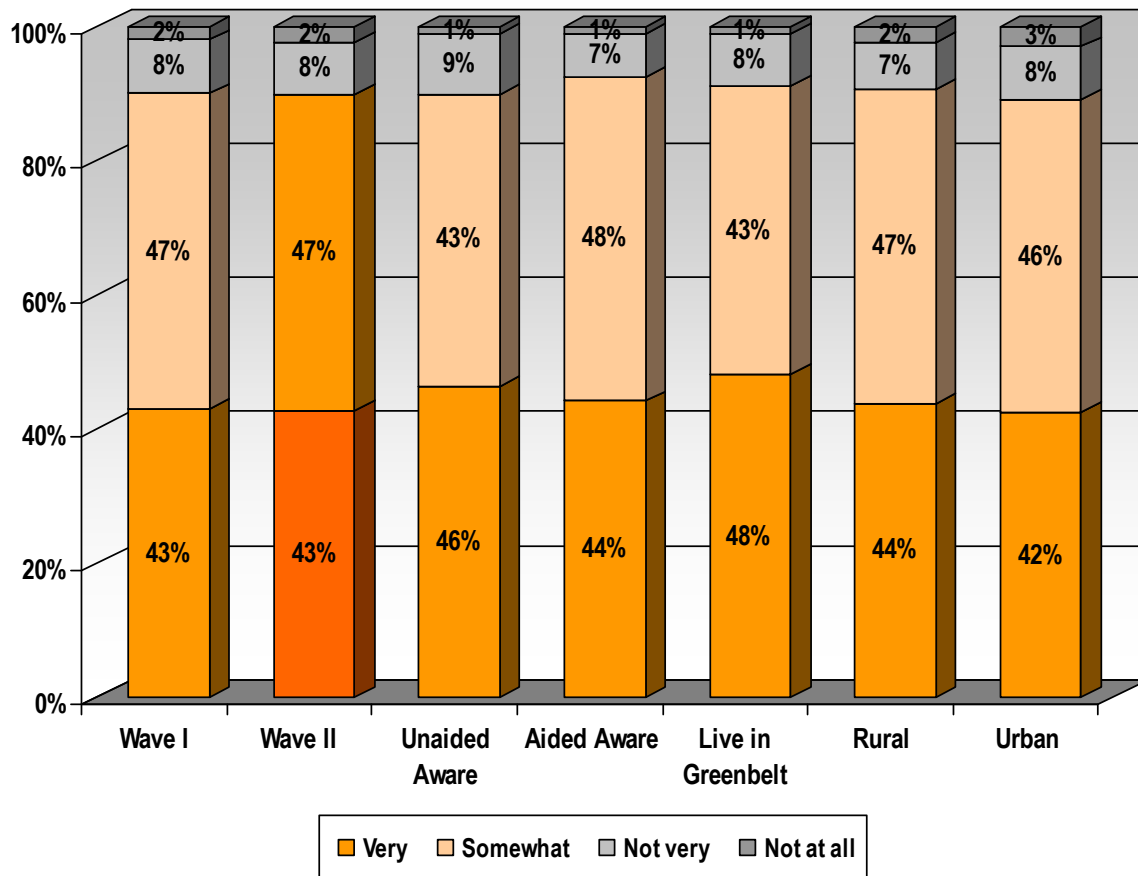
Q1. How concerned are you with the state of the natural environment in Ontario?



- Unchanged from Wave I, overall, four out of five (90%) central Ontarians say they are very (43%) or somewhat (47%) concerned about the state of the natural environment in Ontario.
- As in Wave I, women are more likely than men to say they are very concerned (48% vs. 38%)
- Similarly, those aged 50 years or more (49%) are more likely than either those 30-49 (35%), or those 18-29 (32%) to be very concerned
- Regionally, those in York-Durham (47%) were more likely to say they are very concerned while those in Grey-Bruce are less likely (39%). These differences are slightly less pronounced than in Wave I.



Q1. How concerned are you with the state of the natural environment in Ontario? (continued)



- Those who claim to live in the Greenbelt (48%), and those who have unaided awareness of the Greenbelt (46%) are more likely to be very concerned.
- 60% of those who initially support the Greenbelt are very concerned, compared to 37% of those who somewhat support it, and 33% of those who initially oppose the Greenbelt. These patterns are similar, although less pronounced, as in Wave I.



Q2. What programs, initiatives or government acts have you heard of, if any, that will protect the natural environment in rural or agricultural spaces of land in Ontario? – All Respondents, multiple responses

	Wave		Men	Women	18-29	30-49	50+
	I	II					
Greenbelt Act/Plan	6	10	14	7	12	11	10
Oak Ridges Moraine	9	8	8	8	3	10	7
Kyoto	1	5	6	4	3	5	5
Niagara Escarpment Plan	2	2	4	1	1	2	3
Drive Clean/car emissions	2	2	3	2	4	3	2
Blue Box/compost	1	2	1	4	3	3	2
Closing coal plants	2	2	3	1	0	1	3
Water protection/test	1	2	2	3	1	0	4
Initiatives to restrict dev.	1	2	2	2	0	1	2
Clean, safe drinking water	2	2	2	1	3	2	1
Other	16	21	24	19	17	19	24
None	6	7	7	6	12	5	7
Don't know/no answer	61	52	47	58	58	54	50

Note: sums to more than 100% due to more than one answer being accepted

- Fully one-in-ten respondents spontaneously mentioned the Greenbelt when asked which programs, initiatives or government acts they have heard of to protect the natural environment in rural or agricultural spaces of land in Ontario. This is up significantly from the 6% who had unaided awareness in Wave I.
- The Oak Ridges Moraine was mentioned by 8% (similar to the 9% who mentioned it in Wave I), followed by the Kyoto Accord (5%, up significantly from 1% in Wave I), and the Niagara Escarpment Plan (2% in Wave I and II).
- Almost six-in-ten (59%) either said 'none' (7%) or were unable to answer (52%). This is a significant improvement over Wave I when two-thirds (67%) were unable to answer (61%) or said 'none' (6%).
- Awareness of the Greenbelt is highest among men (14%), those earning \$80,000 or more (17%), and those who say they live in the Greenbelt (15%)



Q2. What programs, initiatives or government acts have you heard of, if any, that will protect the natural environment in rural or agricultural spaces of land in Ontario? (continued) – All Respondents, multiple responses

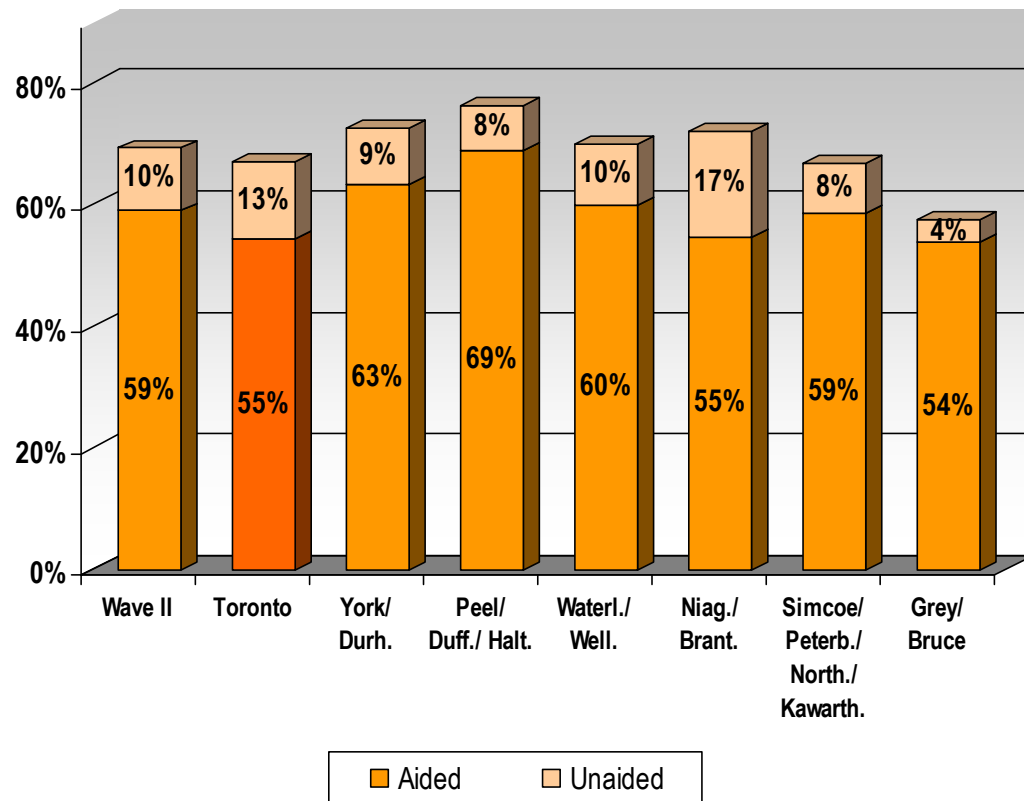
	Wave I	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Greenbelt Act/Plan	6	10	100	0	15	14	9
Oak Ridges Moraine	9	8	10	14	10	7	8
Kyoto	1	5	8	5	7	3	6
Niagara Escarpment Plan	2	2	9	2	4	3	2
Drive Clean/car emissions	2	2	2	3	3	1	3
Blue Box/compost	1	2	3	3	2	2	3
Closing coal plants	2	2	2	2	3	1	2
Water protection/test	1	2	3	3	3	1	2
Initiatives to restrict dev.	1	2	1	2	2	1	2
Clean, safe drinking water	2	2	6	2	2	3	1
Other	16	21	22	24	26	24	21
None	6	7	0	7	7	5	7
Don't know/no answer	61	52	0	55	42	52	52

- Awareness of the Greenbelt is highest among men (14%), those earning \$80,000 or more (17%), and those who say they live in the Greenbelt (15%)
- Regionally, 17% of those in Niagara-Brantford and 12% of those in Toronto mention the Greenbelt, while just 4% in Grey-Bruce and 8% in Peel-Halton mention it.

Note: sums to more than 100% due to more than one answer being accepted



Q2. What programs, initiatives or government acts have you heard of, if any, that will protect the natural environment in rural or agricultural spaces of land in Ontario? (continued) – All Respondents, multiple responses



- Excluding those who had unaided awareness, three-in-five (59%), said they have heard of the Greenbelt before. This compares to 54% in Wave I. Combined total awareness rises from 60% in Wave I to 69% in Wave II, a significant increase.
- Total awareness is higher among men than women (72% aided/unaided vs. 67%), and those aged 50+ years than those aged 18-29 (76% aided/unaided vs. 47%).
- Awareness is correlated to education, with 78% of those with post-graduate degrees being aware compared to 62% of those with high school education or less.



Q3. And what advertising have you heard or seen in the past month for any programs, initiatives or government acts that will protect the natural environment in rural or agricultural spaces of land in Ontario? – All Respondents, multiple responses

	Wave		Men	Women	18-29	30-49	50+
	I	II					
Greenbelt Act/Plan		4	5	4	4	5	4
One Tonne Challenge		2	3	2	6	2	2
Oak Ridges Moraine		1	1	2	0	1	1
Recycling/composting		1	1	1	3	2	*
Kyoto Accord		1	1	1	1	0	2
General Advert		1	1	1	0	1	1
Alternative energy		1	1	1	1	1	1
Discuss nuclear energy		1	2	*	1	1	2
Other		9	9	9	9	8	10
None		12	13	11	12	13	11
Don't know/no answer		68	65	72	66	68	69

- When asked which programs, initiatives or government acts they have heard of to protect the natural environment in rural or agricultural spaces of land in Ontario, fully four-fifths (80%) were unable to answer (68%) or said 'none' (12%).
- Awareness is low across most groups but is higher among high income earners (8% of those earning \$80,000 or more).
- Following the Greenbelt, the One Tonne Challenge (2%), the Oak Ridges Moraine (1%), and general recycling/composting programs (1%) were mentioned next most frequently.

Note: sums to more than 100% due to more than one answer being accepted



Q3. And what advertising have you heard or seen in the past month for any programs, initiatives or government acts that will protect the natural environment in rural or agricultural spaces of land in Ontario? – All Respondents, multiple responses

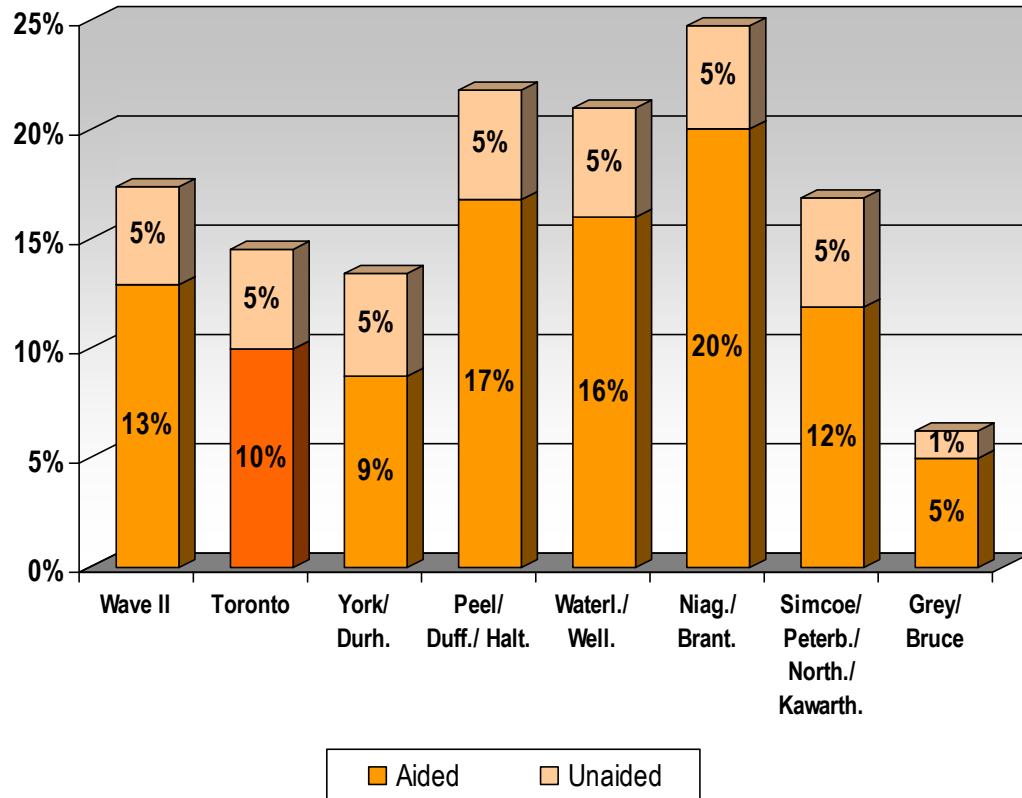
	Wave I	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Greenbelt Act/Plan		4	23	3	8	7	4
One Tonne Challenge		2	7	1	2	1	2
Oak Ridges Moraine		1	1	1	2	3	1
Recycling/composting		1	2	1	1	1	1
Kyoto Accord		1	0	1	1	1	1
General Advert		1	3	1	2	1	1
Alternative energy		1	1	1	1	2	1
Discuss nuclear energy		1	1	1	2	1	1
Other		9	10	8	13	12	8
None		12	8	12	5	6	3
Don't know/no answer		68	54	70	60	70	68

- Those who later said they live in the Greenbelt were more likely to spontaneously mention advertising for the Greenbelt (8%) as were those living in rural areas (8%).
- A quarter (23%) of those with unaided awareness of the Greenbelt spontaneously mentioned seeing advertising for the Greenbelt.

Note: sums to more than 100% due to more than one answer being accepted



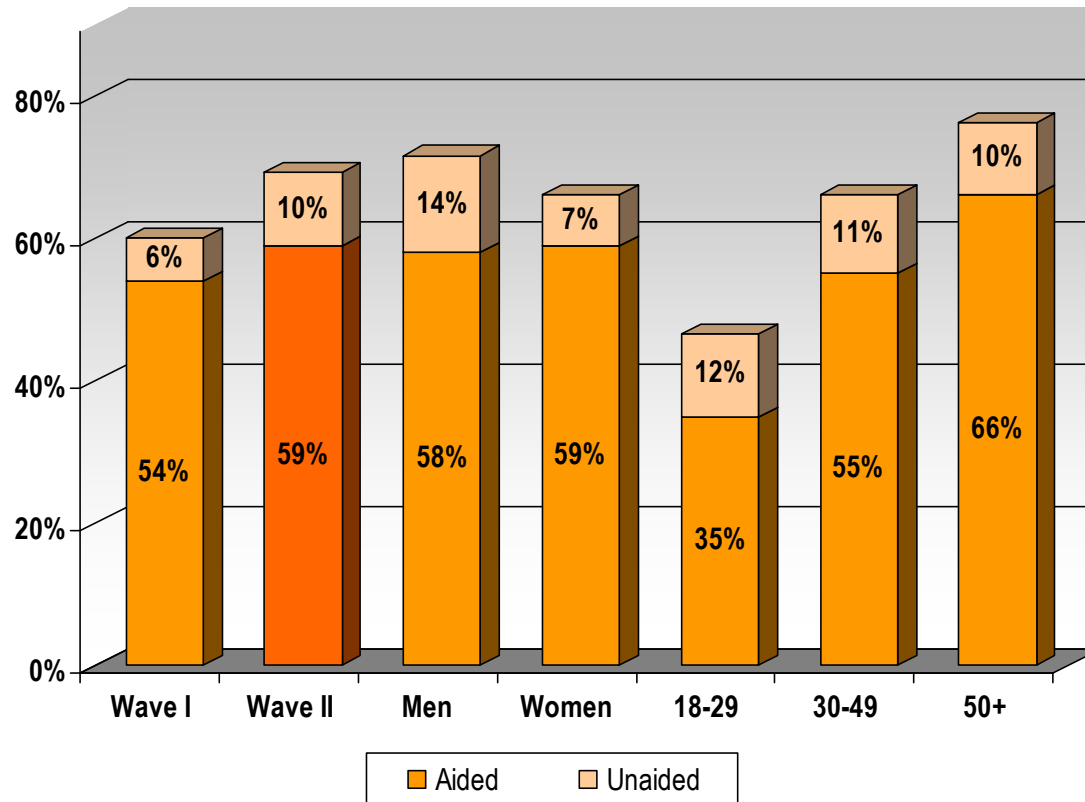
Q3. And what advertising have you heard or seen in the past month for any programs, initiatives or government acts that will protect the natural environment in rural or agricultural spaces of land in Ontario? – All Respondents, multiple responses



- Excluding those who had unaided awareness, three-in-five (59%), said they have heard of the Greenbelt before. This compares to 54% in Wave I. Combined total awareness rises from 60% in Wave I to 69% in Wave II, a significant increase.
- Total awareness is higher among men than women (72% aided/unaided vs. 67%), and those aged 50+ years than those aged 18-29 (76% aided/unaided vs. 47%).
- Awareness is correlated to education, with 78% of those with post-graduate degrees being aware compared to 62% of those with high school education or less.



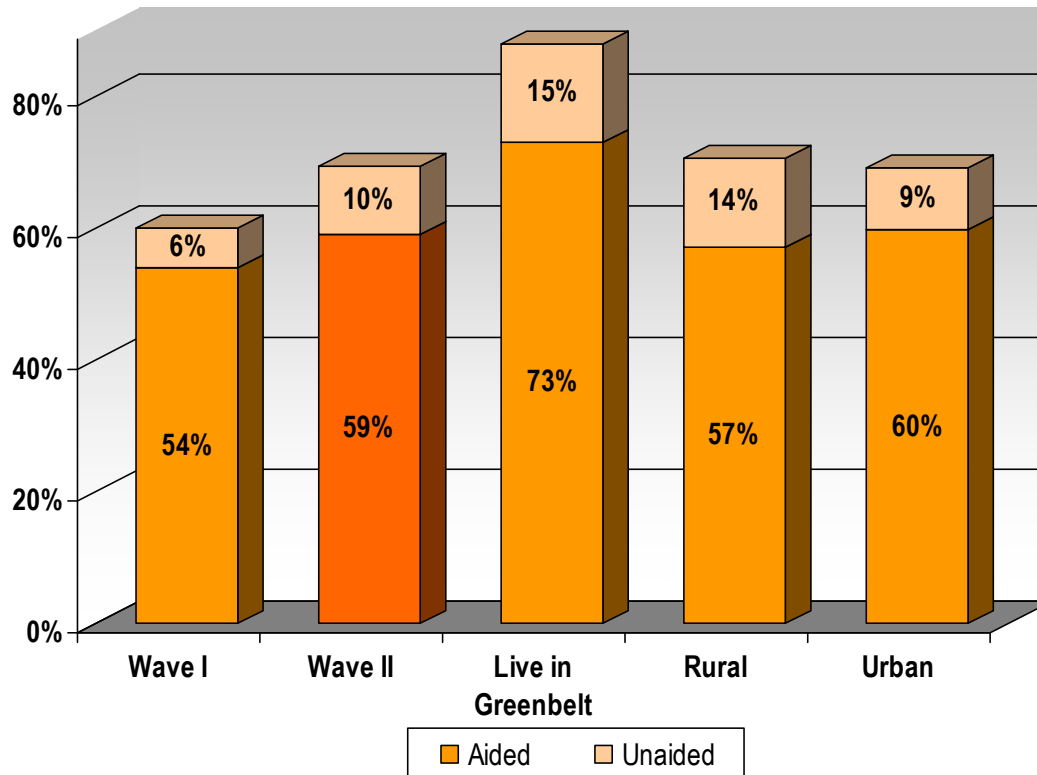
Q4. Before today, have you ever heard of the Greenbelt, the Greenbelt Plan, or the Greenbelt Act in Ontario?



- Excluding those who had unaided awareness, three-in-five (59%), said they have heard of the Greenbelt before. This compares to 54% in Wave I. Combined total awareness rises from 60% in Wave I to 69% in Wave II, a significant increase.
- Total awareness is higher among men than women (72% aided/unaided vs. 67%), and those aged 50+ years than those aged 18-29 (76% aided/unaided vs. 47%).
- Awareness is correlated to education, with 78% of those with post-graduate degrees being aware compared to 62% of those with high school education or less.



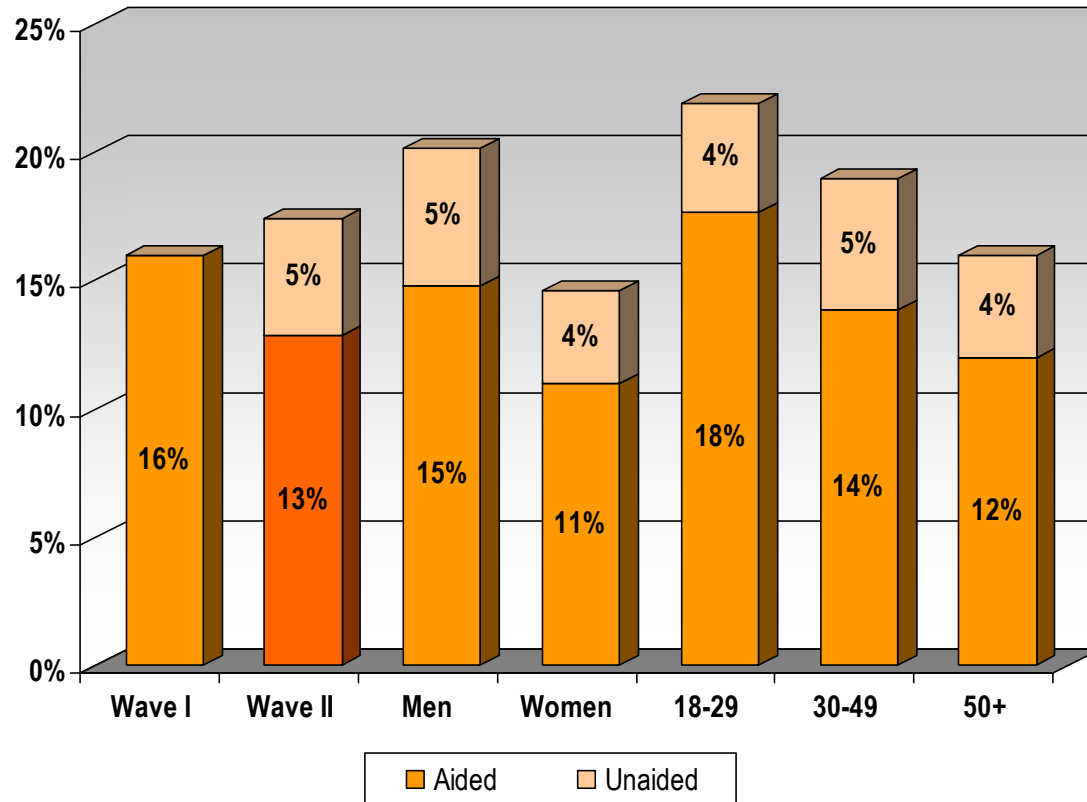
Q4. Before today, have you ever heard of the Greenbelt, the Greenbelt Plan, or the Greenbelt Act in Ontario? (Continued)



- Almost nine-in-ten (88%) residents who later say they live in the Greenbelt have unaided or aided awareness of the Greenbelt, up from 82% in Wave I.
- While unaided awareness is higher in rural areas than in urban areas (14% vs. 9%), total awareness is within the margin of error (71% vs. 69%).
- Regionally, those in Dufferin-Peel-Halton are the most likely to have aided or unaided awareness of the Greenbelt (76%), followed by those in York-Durham (73%). Only 54% of those in Grey-Bruce have aided or unaided awareness.



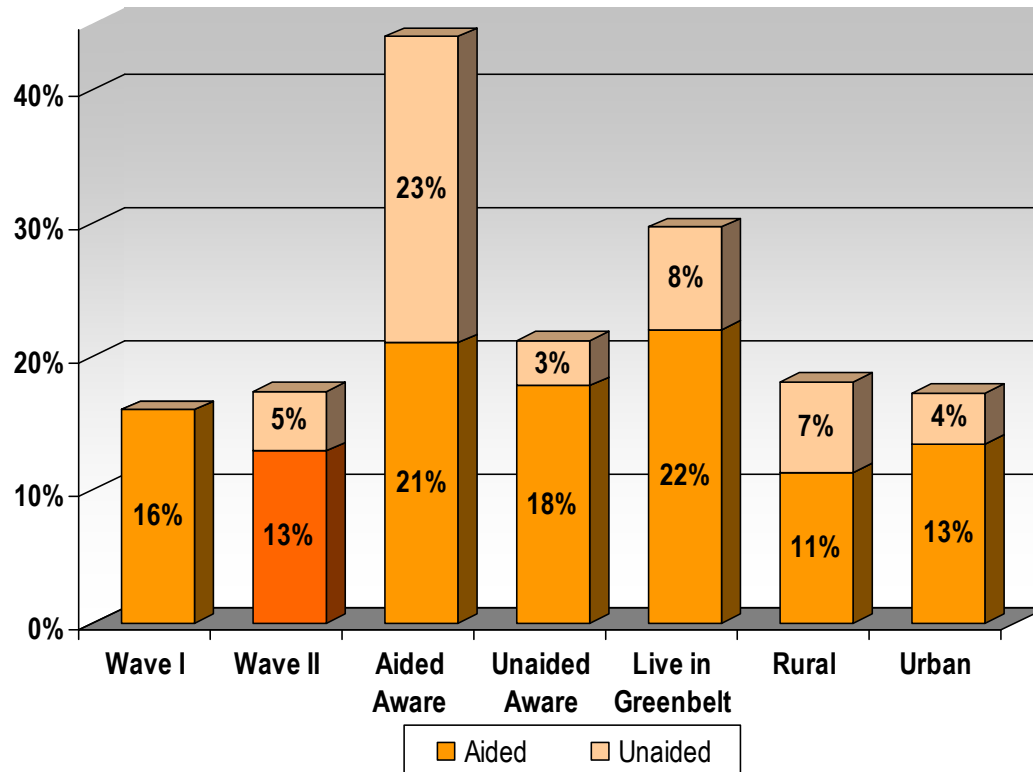
Q6. Have you seen any advertising describing the Greenbelt?



- In addition to the 5% of central Ontarians with unaided recall of advertising for the Greenbelt, a further 13% had aided awareness. Total awareness is 17% in Wave II. In Wave I only aided awareness was measured (16% claimed).
- Men are more likely than women to have unaided or aided advertising recall (20% vs. 15%).
- Counter to most other awareness and concern measures, older Ontarians are *less* likely to have seen any advertising (16% of those aged 50+ vs. 22% of those aged 18-29).



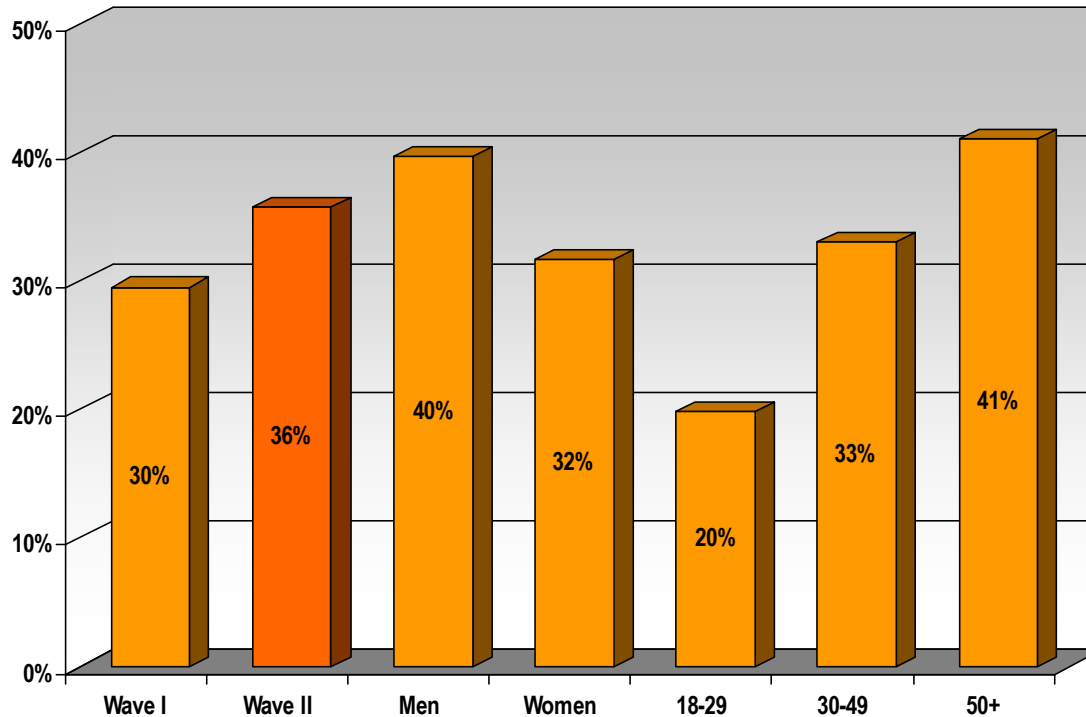
Q6. Have you seen any advertising describing the Greenbelt? (Continued)



- Not surprisingly, advertising awareness is highest among those who had unaided awareness of the Greenbelt. Fully 45% of those who were spontaneously aware of the Greenbelt recall seeing advertising for it. This compares to 21% of those with just aided awareness of the Greenbelt.
- Among those who claim to live in the Greenbelt, three-in-ten (30%) claim unaided or aided advertising recall.
- Regionally, a quarter (25%) of those in Niagara/Brantford and 22% of those in Dufferin/Peel/Halton claim awareness. This compares to just 6% for those in Grey-Bruce and 13% of those in York-Durham.



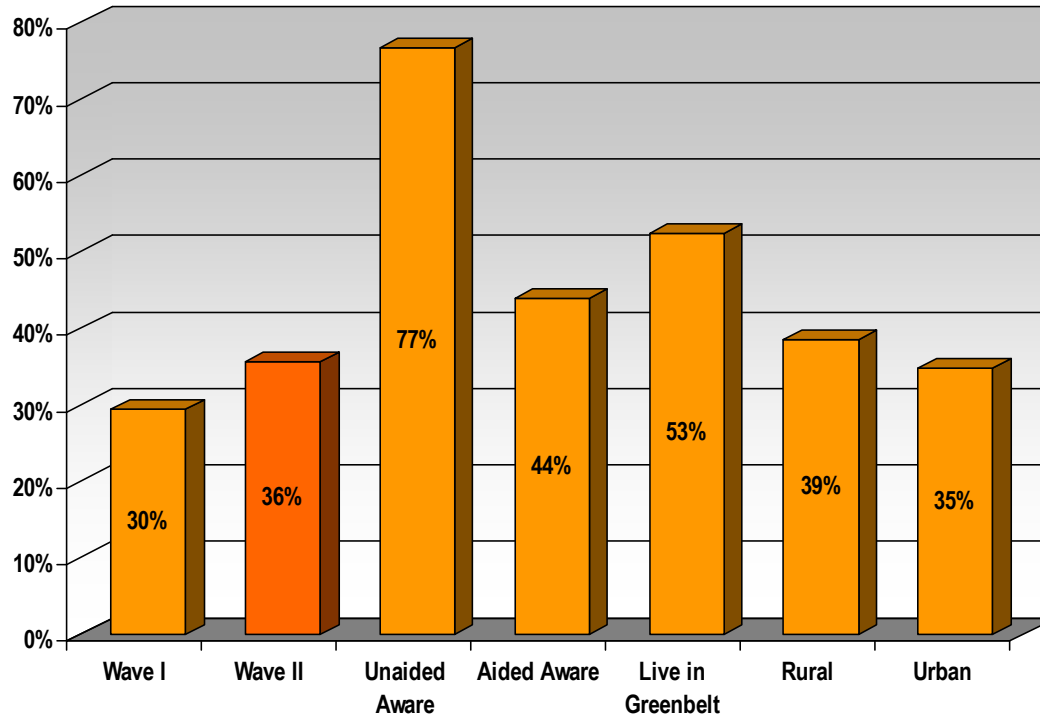
Q5. Have you seen or read any news stories in the media describing the Greenbelt?



- More than one-third (36%) of central Ontarians report that they have seen news stories in the media describing the Greenbelt. This is significantly higher than the 30% who said the same thing in Wave I.
- As before, men are more likely than women to report seeing news stories about the Greenbelt in the media (40% vs. 32% in Wave II compared to 34% vs. 25% in Wave I).
- Those aged 50+ years are much more likely to have seen news stories about the Greenbelt in the media than those aged 15-29 (41% vs. 20% in Wave II compared to 16% vs. 37% in Wave I)
- University grads (40%) and post-grads (48%) are much more likely to have seen news stories in the media, whereas those with high school or less education are much less likely to have (26%).



Q5. Have you seen or read any news stories in the media describing the Greenbelt? (Continued)



- Those with unaided awareness (77%) of the Greenbelt are more than twice as likely to have seen news stories about the Greenbelt in the media, up significantly over the same group's score in Wave I (66%).
- Half (53%) of those who say they live in the Greenbelt and 39% of those who live in rural areas say they have seen news stories describing the Greenbelt.
- Regionally, those in Dufferin-Peel-Halton (41%) are more likely to have seen news stories in the media, whereas those in Grey-Bruce (21%) are less likely.



Q7. Where did you see or hear advertising for the Greenbelt?

Base: Unaided or aided advertising awareness

	Wave II	Men	Women	18-29	30-49	50+
Radio	45	50	37	43	64	30
Newspapers	29	25	36	33	13	40
Television	26	27	4	19	24	30
Magazines	3	2	4	5	2	4
Sign on 400/401/QEW	3	3	3	5	3	2
Other	5	3	7	0	4	6
Don't know/no answer	10	10	10	24	4	11

- The most frequently mentioned source for seeing or hearing advertising for the Greenbelt was the radio (45%), followed by newspapers (29%). One-quarter (26%) said they saw it on television, even though no advertising was shown on this medium.
- Men were more likely than women to say they heard it on the radio (50% vs. 36%), while women were more likely than men to say they saw it in newspapers (36% vs. 25%).
- Middle-aged respondents were more likely than older ones to say they heard it on the radio (64% vs 30%).



Q7. Where did you see or hear advertising for the Greenbelt?

Base: Aided or unaided advertising awareness

	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Radio	45	46	44	51	35	48
Newspapers	29	35	28	26	38	27
Television	26	30	25	25	28	25
Magazines	3	6	2	4	0	4
Sign on 400/401/QEW	3	4	2	2	2	3
Other	5	6	5	5	5	5
Don't know/no answer	10	2	12	9	10	10

- Those who say they live in the Greenbelt are slightly more likely (51%) to say they heard it on the radio, while those who live in rural areas are more likely to say they read it in newspapers (38%).



Q8. Please describe as much as you can about the advertising you heard or saw
 Base: Unaided or aided advertising awareness

	Wave					
	II	Men	Women	18-29	30-49	50+
Child wants to see a deer	21	25	16	10	30	18
"Where do apples come from?"	13	14	11	14	12	13
"Where does water come from"	12	11	12	5	15	11
Awareness/existence of GB	10	11	10	10	16	6
GB needs to be protected	8	8	7	5	6	10
Stop development on GB	5	6	4	10	3	5
Location of GB	5	6	3	14	5	2
Saw on TV	4	2	7	0	3	6
Heard on radio	3	3	4	5	3	6
Other	5	6	5	7	5	5
Don't know/no answer	21	20	22	14	8	32

- Given that more heard the advertising on the radio than saw it in any other media, it is not surprising that the most recalled content were the themes from the radio ads. The child wanting to see a deer had the highest recollection (21% of those with ad recall), followed by the radio spot about where apples come from (13%), and the spot about where water comes from (12%).
- Those aged 30-49 are more likely to cite the spot about deer (30%), as are those with children (30%), those with high incomes (30% of those earning \$80k+).
- 21% were unable to recall any details of the ads, led by those aged 50+ (32%).



Q8. Please describe as much as you can about the advertising you heard or saw
 Base: Unaided or aided advertising awareness

	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Child wants to see a deer	21	15	22	27	15	23
"Where do apples come from?"	13	9	14	13	10	13
"Where does water come from"	12	4	14	11	5	13
Awareness/existence of GB	10	6	12	12	5	12
GB needs to be protected	8	11	6	13	5	8
Stop development on GB	5	6	5	4	10	4
Location of GB	5	11	2	4	5	4
Saw on TV	4	0	6	4	2	4
Heard on radio	3	0	5	6	2	4
Other	5	21	8	9	5	5
Don't know/no answer	21	15	22	16	32	17

- Those who say they live in the Greenbelt (27%) and those with unaided advertising recall (31%) are more likely to mention the deer spot.
- Those who later said they found the ads enjoyable are more likely to have described the deer spot (26%).



Q8. Please describe as much as you can about the advertising you heard or saw
 Base: Unaided or aided advertising awareness

	Total	Tor- onto	York/ Dur.	Peel/ Halt./ Duff.	Water./ Well.	Niag. /Brant	Sim./ Peter/ Kaw.	Grey/ Bruce
Child wants to see a deer	22	24	40	26	14	16	19	0
Where do apples come from?	13	21	0	9	14	16	11	20
Where does water come from?	11	21	5	6	19	8	15	0
Awareness / existence of GB	10	7	5	9	24	8	11	20
GB needs to be protected	7	3	15	9	10	5	7	0
Stop development on GB	5	3	0	6	10	8	0	20
Location of GB	5	3	5	3	0	8	7	0
Saw on TV	4	3	10	6	5	0	0	20
Heard on radio (unspec.)	3	3	5	6	0	5	0	0
DK/NA	21	17	10	20	19	29	26	20

- Those who say they live in the Greenbelt (27%) and those with unaided advertising recall (31%) are more likely to mention the deer spot.
- Those who later said they found the ads enjoyable are more likely to have described the deer spot (26%).



Q8. Please describe as much as you can about the advertising you heard or saw
 Base: Unaided or aided advertising awareness

	Total	Radio	TV	News- paper	Maga- zine	Hwy Sign	Other
Child wants to see a deer	22	42	3	11	40	0	8
Where do apples come from?	13	25	9	2	0	0	8
Where does water come from?	11	19	6	7	20	0	5
Awareness / existence of GB	10	13	15	9	0	0	13
GB needs to be protected	7	6	15	7	0	0	18
Stop development on GB	5	5	6	4	0	0	8
Location of GB	5	3	9	9	20	0	8
Saw on TV	4	0	3	0	0	0	3
Heard on radio (unspec.)	3	0	0	0	0	0	0
DK/NA	21	8	26	33	40	67	25

- Those who say they live in the Greenbelt (27%) and those with unaided advertising recall (31%) are more likely to mention the deer spot.
- Those who later said they found the ads enjoyable are more likely to have described the deer spot (26%).



Q9. What do you think the main point of the advertising was?

Base: Unaided or aided advertising awareness

	Wave					
	II	Men	Women	18-29	30-49	50+
Public awareness campaign	14	14	15	29	18	8
GB will protect wildlife	13	15	11	10	21	8
GB will protect water systems	8	9	6	10	6	8
GB needs to be preserved	8	8	7	0	10	7
Stop development on GB	6	7	6	5	4	8
GB will protect agriculture	6	6	6	5	5	4
GB will protect trees	5	5	6	5	5	5
Other	6	6	6	5	5	7
Don't know/no answer	6	8	4	14	3	7

- When asked what the main point of the advertising campaign was, a wide range of responses was given, led by 14% who thought it was a public awareness campaign. A further 13% thought it was to communicate that the Greenbelt will protect wildlife habitats in Ontario, or to protect water systems (8%) or to preserve the Greenbelt (8%).



Q9. What do you think the main point of the advertising was?

Base: Unaided or aided advertising awareness

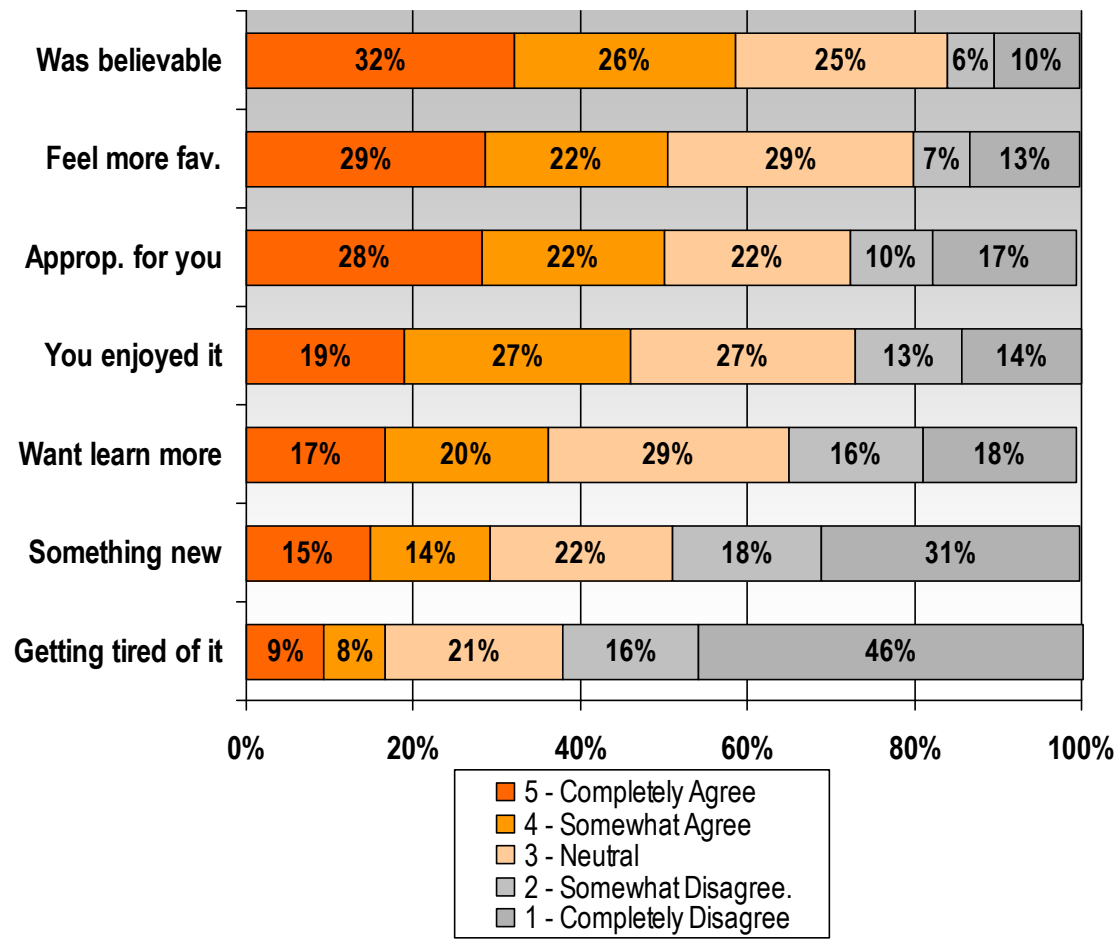
	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Public awareness campaign	14	20	13	15	8	16
GB will protect wildlife	13	13	14	18	18	12
GB will protect water systems	8	4	9	7	10	7
GB needs to be preserved	8	2	9	11	2	9
Stop development on GB	6	13	4	9	8	6
GB will protect agriculture	6	6	4	5	8	5
GB will protect trees	5	4	6	6	10	4
Other	6	17	8	8	8	6
Don't know/no answer	6	0	8	2	8	6

- Those with unaided awareness of the Greenbelt were more likely to think it was a general public awareness campaign (20%).
- Those who live in the Greenbelt are more likely to say the main point was that the Greenbelt will protect wildlife habitats (18%).



Q10. Summary of advertising indices

Base: Unaided or aided advertising awareness

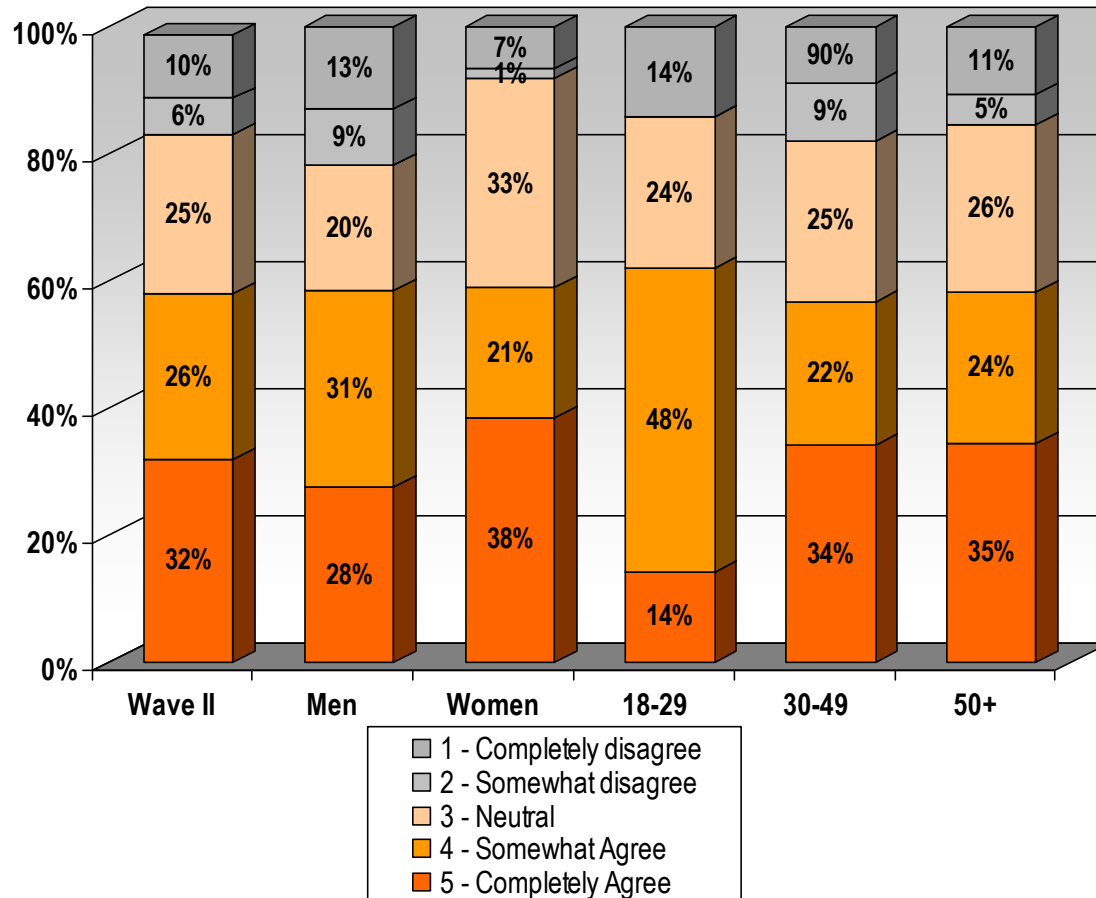


- Of the seven different advertising attributes measured, respondents agreed most strongly with the statement that the advertising was believable (59% completely or somewhat agree), followed by 'it made them feel more favourably toward the Greenbelt (51%)' and 'it is appropriate for people like you (50%).'
- Fewer agreed that 'it taught them something new about the Greenbelt (29%)' or that 'it made them want to learn more about the Greenbelt (37%)'.
- Disagreement was strongest with the negative statement 'you are getting tired of it' (17%). Almost half (46%) said they completely disagreed with this statement.



Q10a. The advertising for the Greenbelt was believable

Base: Unaided or aided advertising awareness

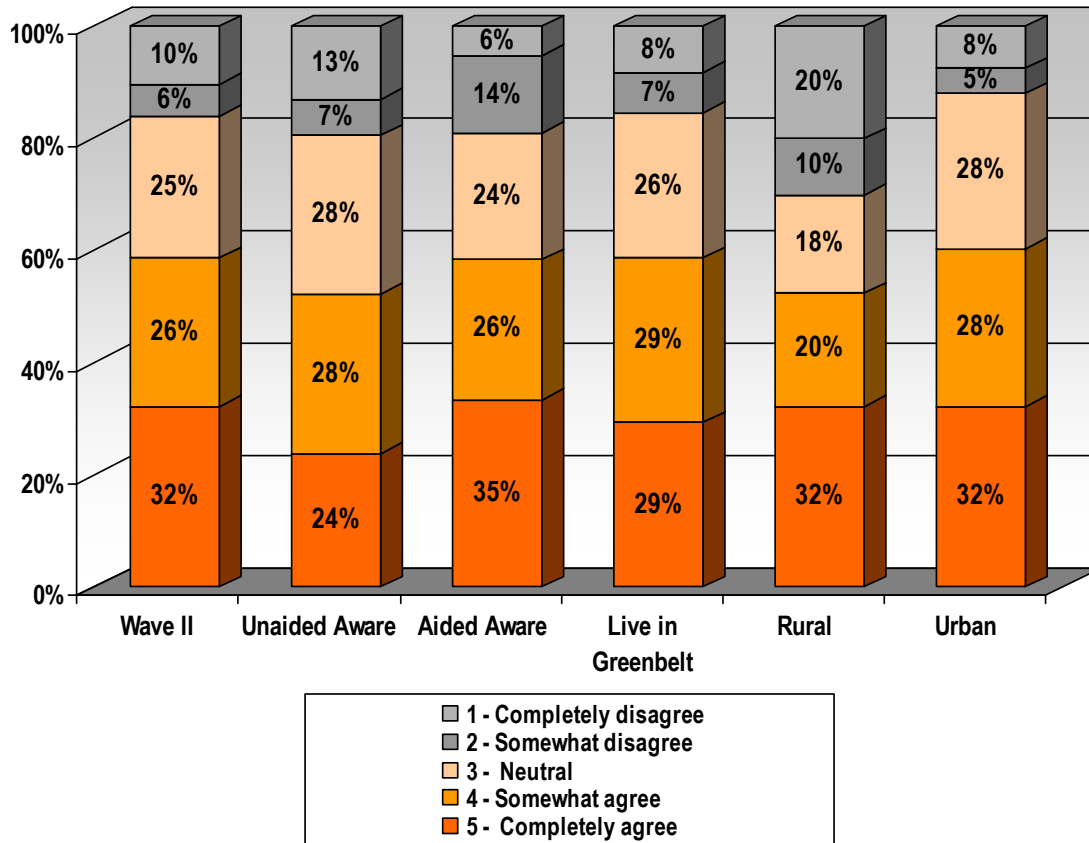


- One third (32%) of those with advertising recall gave a rating of 5 out of 5 (completely agree) that the advertising was believable. A further 26% gave a rating of 4 out of 5 (somewhat agree). Only 16% gave ratings of 1 or 2 out of 5.
- Although total agreement (4s and 5s) were fairly consistent across most demographic groups, women were more likely than men to give a rating of 5 out of 5 (38% vs. 28%), and those aged 18-29 were less likely (14%).



Q10a. The advertising for the Greenbelt was believable

Base: Unaided or aided advertising awareness

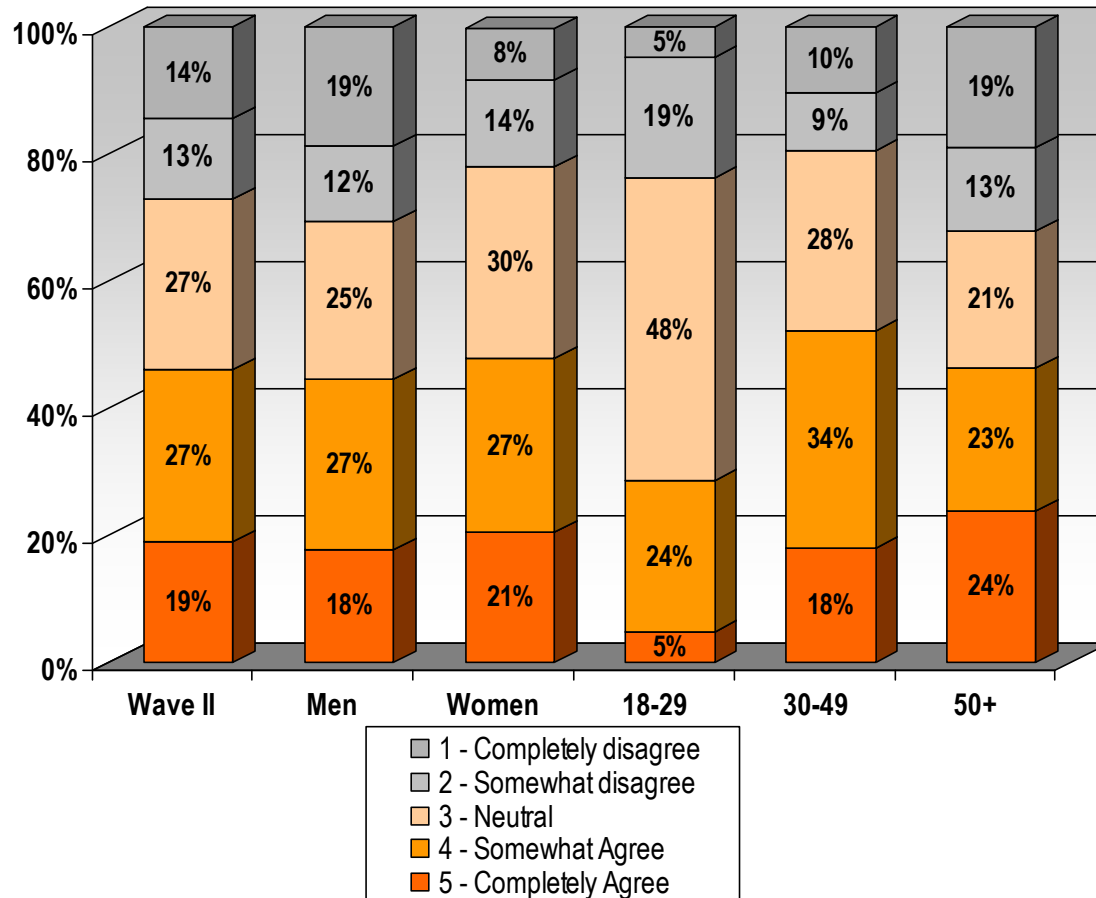


- Those with unaided awareness are less likely to agree that the advertising was believable with 24% giving a rating of 5 out of 5, compared to 35% of those with unaided awareness.
- Those living in rural areas were more likely to give ratings of 1 (20%) or 2 (10%) out of 5.



Q10b. You enjoyed the advertising for the Greenbelt

Base: Unaided or aided advertising awareness

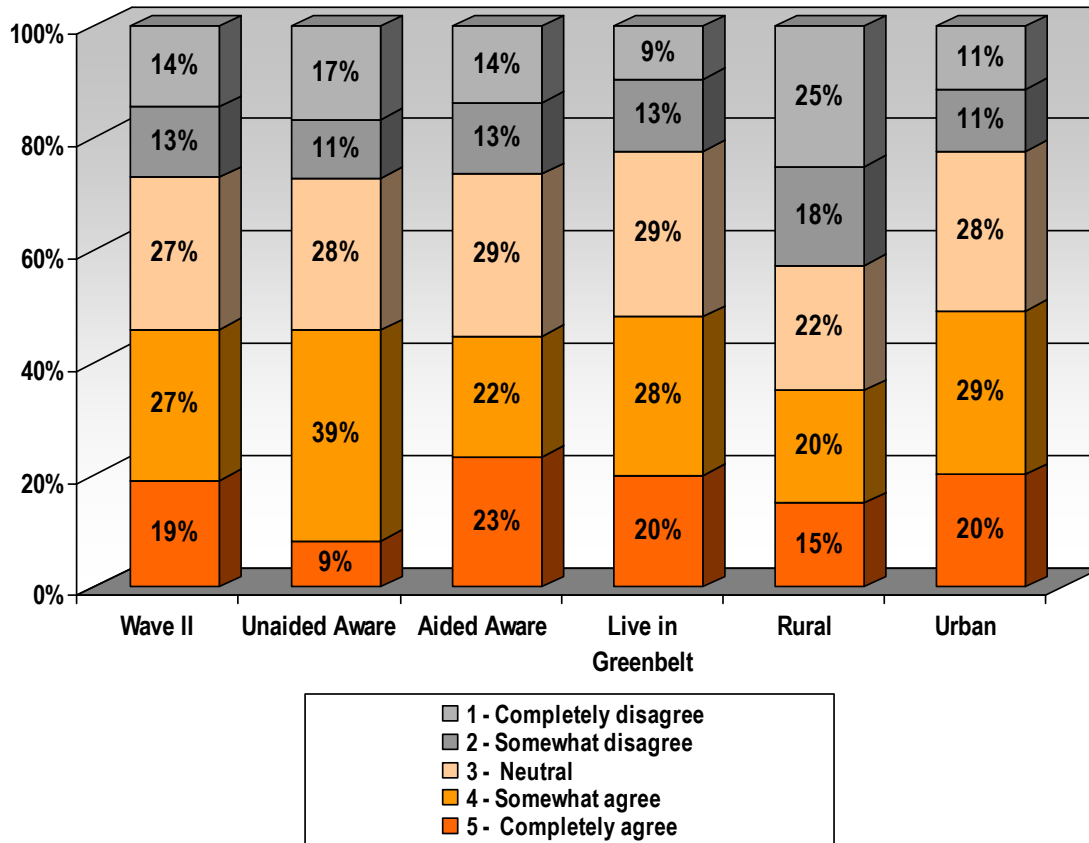


- Overall, almost half (46%) of those with advertising recall gave a rating of 5 (19%) or 4 (27%) out of 5 in terms of the statement 'you enjoyed the advertising for the Greenbelt.'. A further 27% gave neutral opinions (rating 3 out of 5). Only 27% disagreed, with 13% giving a rating of 2 out of 5 and 14% giving a rating of 1 out of 5.
- Agreement is weak among those aged 18-29, with just 29% giving ratings of 5 (5%) or 4 (24%) out of 5. More gave neutral responses (48%), and few gave negative answers (22% vs. 27% rated 1 or 2 out of 5).
- Those with post-graduate education were more likely to rate the advertising 4 or 5 out of 5 (52%), while those with high school or less were less likely (39%).



Q10b. You enjoyed the advertising for the Greenbelt

Base: Unaided or aided advertising awareness

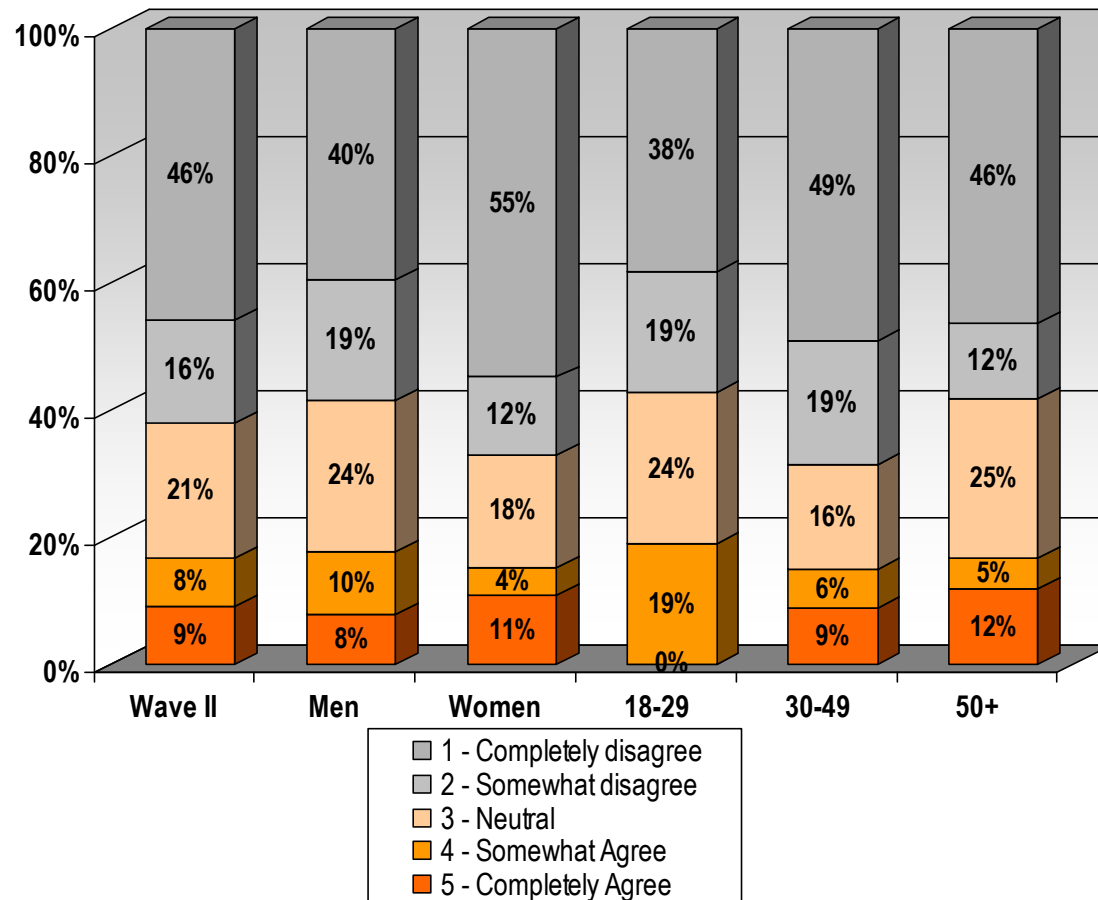


- Those with unaided awareness of the Greenbelt were less likely to give the top rating of 5 out of 5 (9%), but were more likely to give a rating of 4 out of 5 (39%).
- Ratings were lower in rural areas with 35% giving ratings of 5 (15%) or 4 (20%) out of 5.



Q10c. You are getting tired of hearing or seeing the advertising for the Greenbelt

Base: Unaided or aided advertising awareness

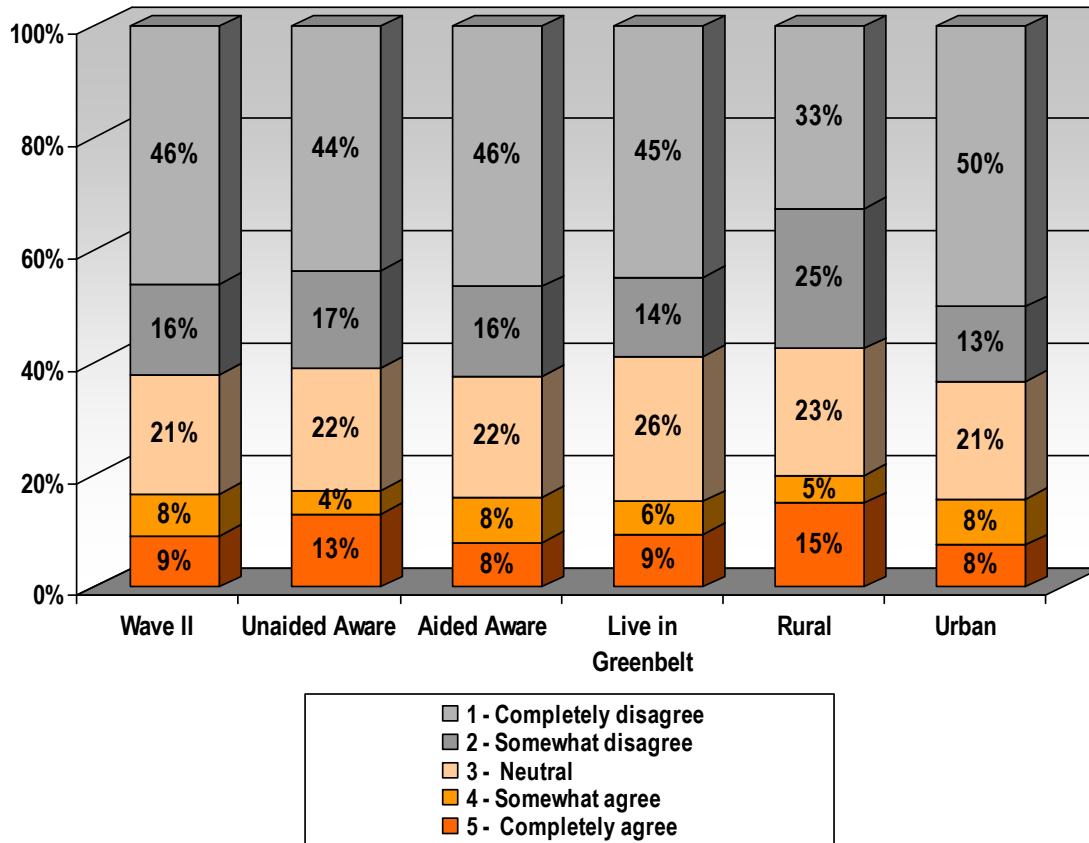


- Almost half (46%) of those with advertising recall gave a rating of 1 out of 5 (completely disagree) when asked if they are getting tired of hearing or seeing advertising for the Greenbelt.
- A further 16% gave a rating of 2 out of 5, while 21% gave a neutral rating of 3. Only 17% gave agreement ratings of 5 out of 5 (9%) or 4 out of 5 (8%).
- Women were more likely than men to completely disagree (55% vs. 40%).



Q10c. You are getting tired of hearing or seeing the advertising for the Greenbelt

Base: Unaided or aided advertising awareness

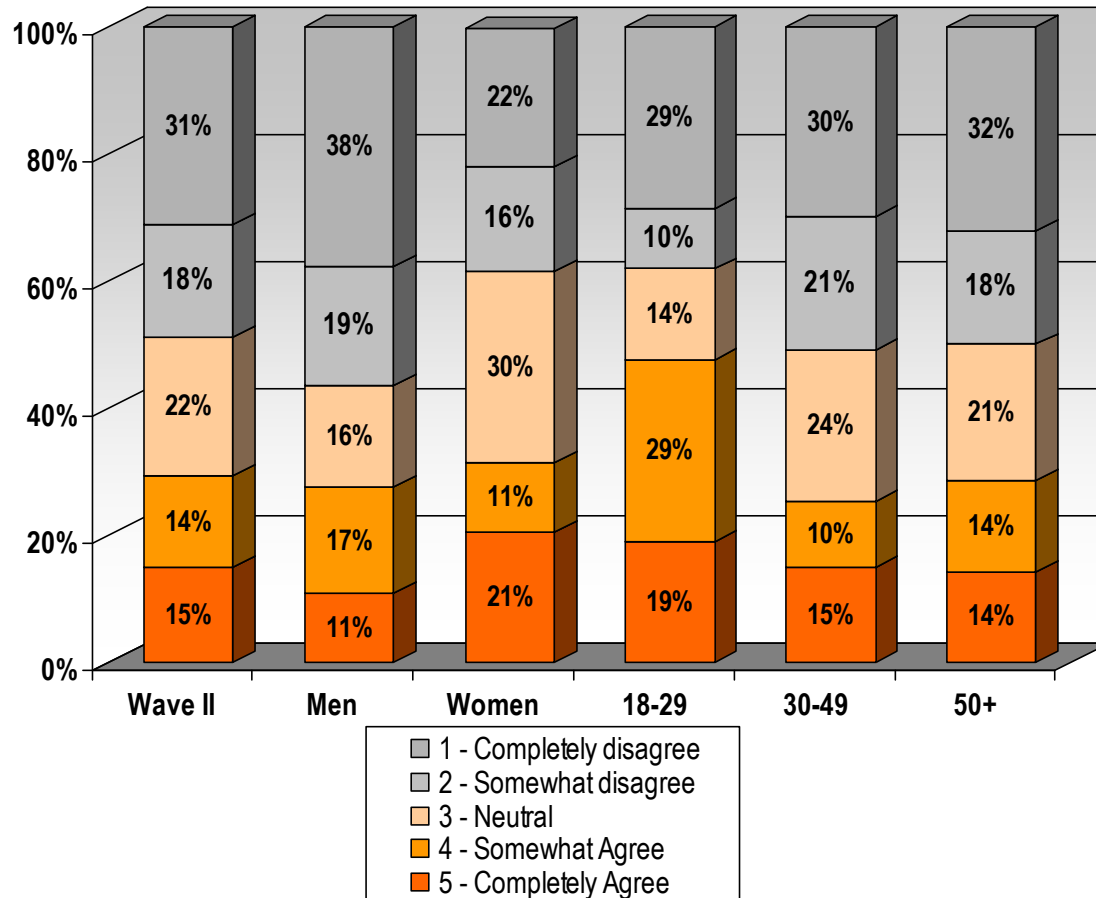


- Ratings are consistent across most regional and awareness measures. Those with unaided awareness of the Greenbelt are slightly more likely to agree completely that they are getting tired of hearing or seeing advertising for the Greenbelt (13%), as are those who live in rural areas (15%).



Q10d. The advertising told you something new about the Greenbelt

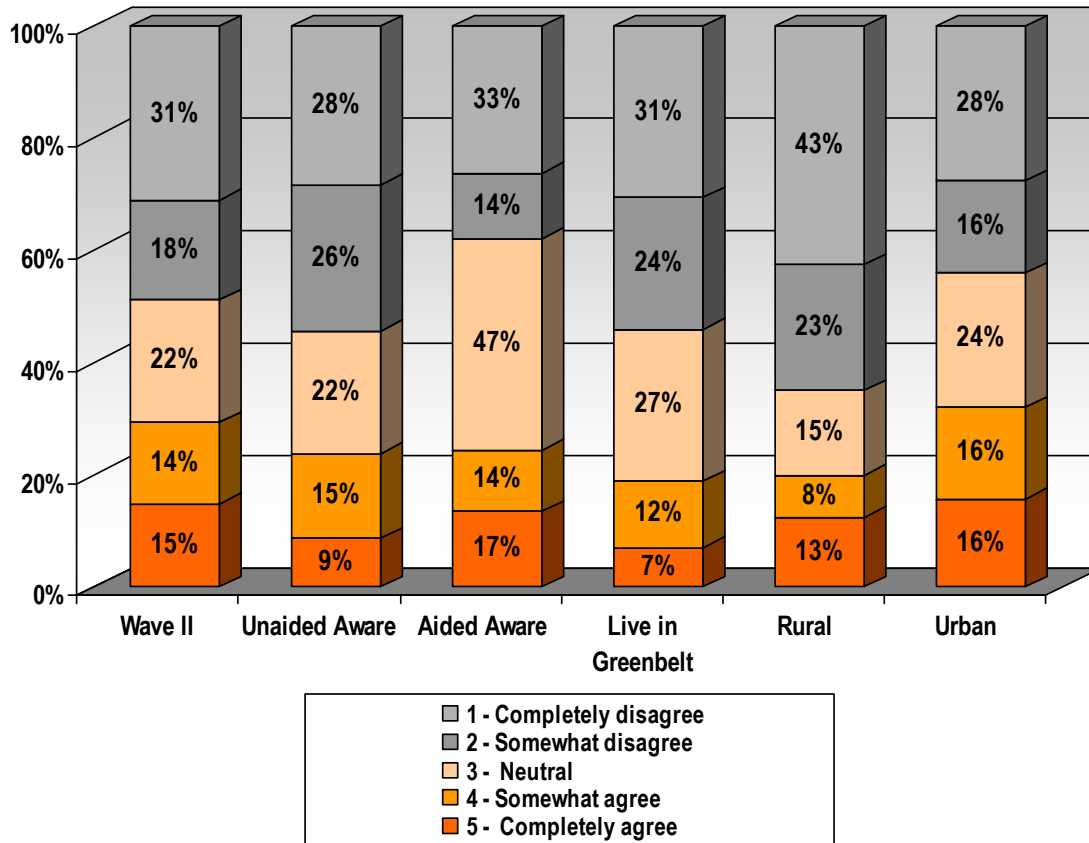
Base: Unaided or aided advertising awareness



- Three-in-ten (29%) of those with advertising recall gave a rating of 5 out of 5 (15%) or 4 out of 5 (14%) that the advertising told them something new about the Greenbelt. A further 22% gave a neutral rating of 3 out of 5.
- Disagreement ran higher with 31% giving a rating of 1 out of 5, and 18% giving a rating of 2 out of 5.
- Women and those aged 18-29 gave more favourable ratings. Women were more likely to give ratings of 5 out of 5 (21%) and neutral ratings of 3 (30%). Almost half (47%) of those aged 18-29 gave ratings of 5 (19%) or 4 (29%) out of 5.



Q10d. The advertising told you something new about the Greenbelt
 Base: Unaided or aided advertising awareness

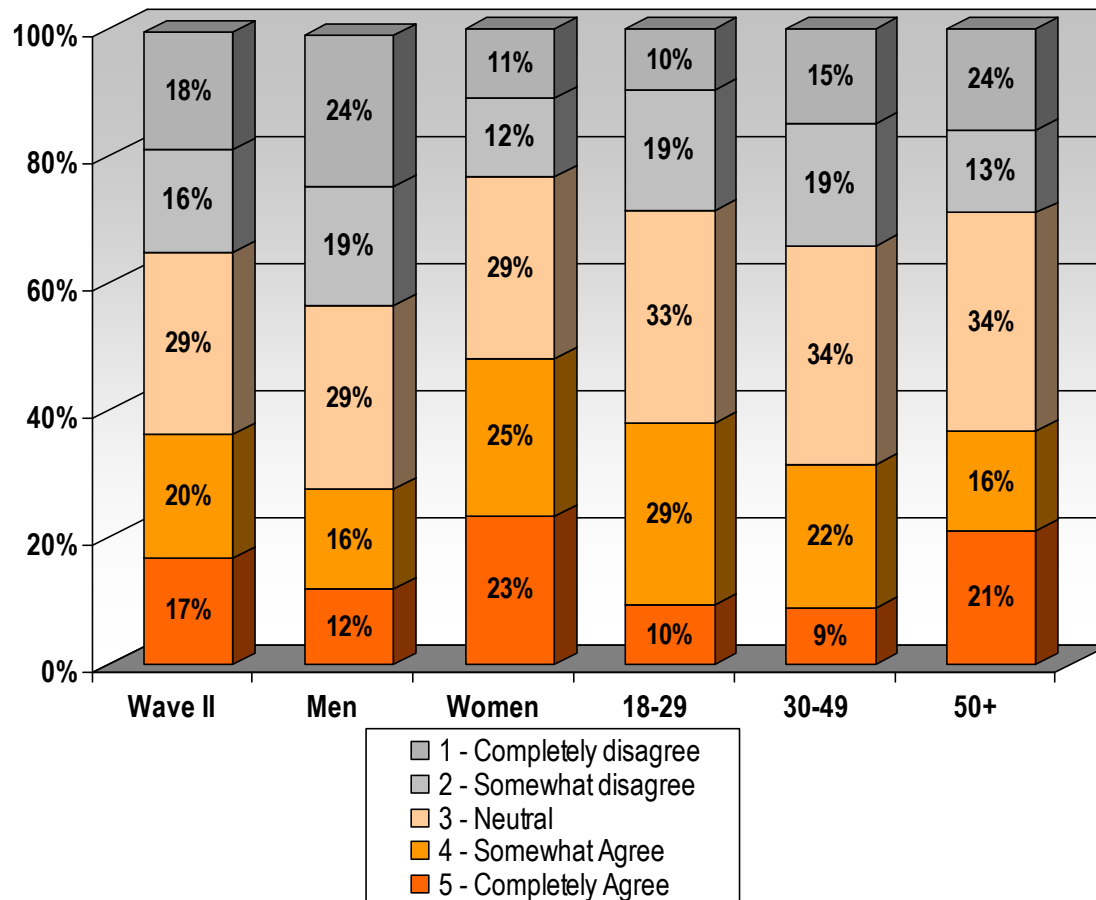


- Those in rural areas were more likely to give ratings of 1 (43%) or 2 (23%) out of 5 in terms of the statement the advertising told them something new about the Greenbelt.
- Those with aided awareness were more likely to take neutral positions (47% rated 3 out of 5).



Q10e. The advertising made you want to learn more about the Greenbelt

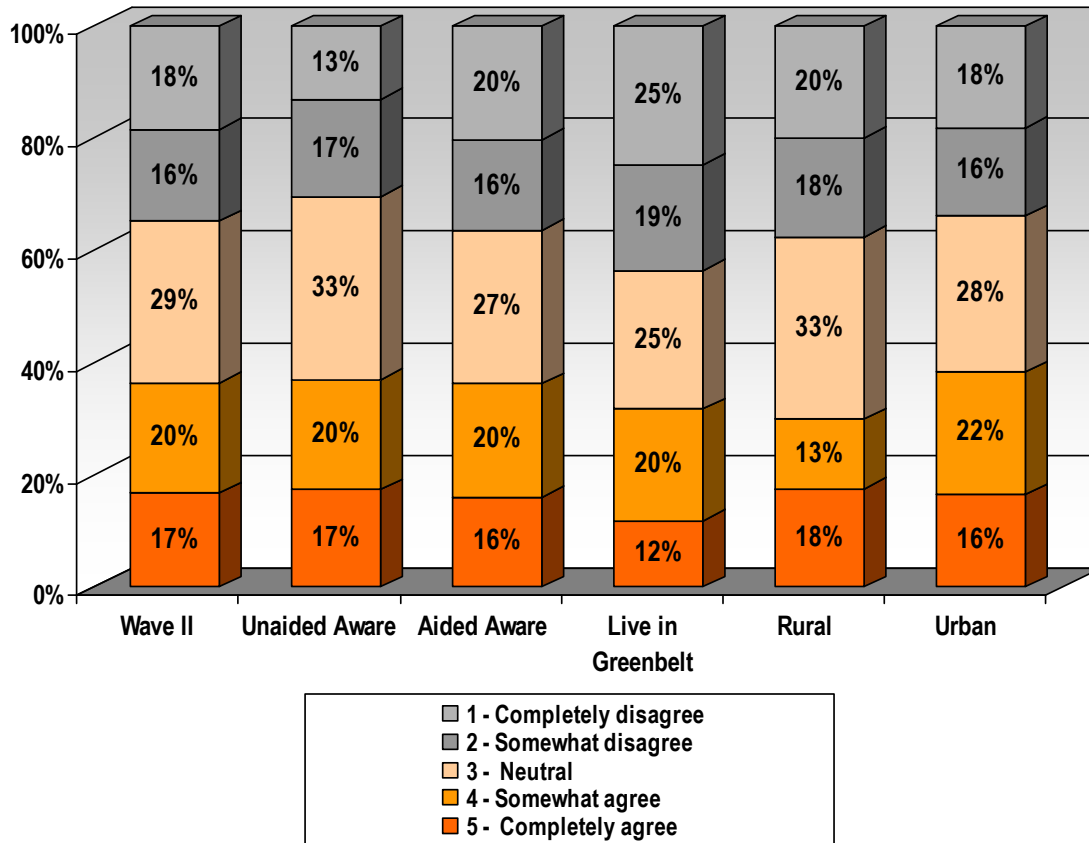
Base: Unaided or aided advertising awareness



- Almost four-in-ten (37%) agreed that the advertising made them want to learn more about the Greenbelt, with 17% rating this statement 5 out of 5, and 20% rating it 4 out of 5. A further 29% gave neutral ratings of 3 out of 5.
- One third (34%) gave negative opinions, with 18% rating their agreement with the statement 1 out of 5, and 18% rating it 2 out of 5.
- Women were more likely than men to give favourable ratings (48% vs. 28% rated 4 or 5 out of 5).



Q10e. The advertising made you want to learn more about the Greenbelt
 Base: Unaided or aided advertising awareness

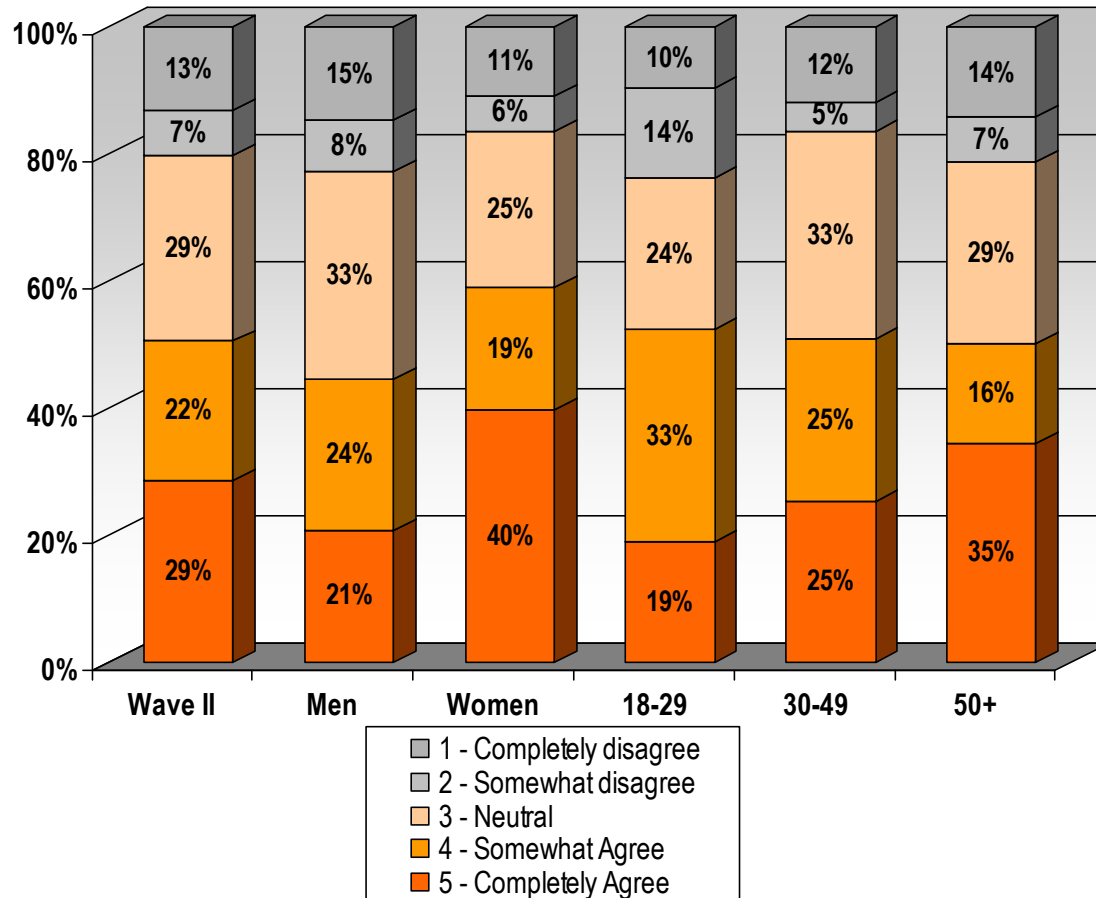


• Those who say they live in the Greenbelt were more likely to disagree that the advertising made them want to learn more about the Greenbelt (44% rated 1 or 2 out of 5).



Q10f. The advertising made you feel more favourably towards the Greenbelt

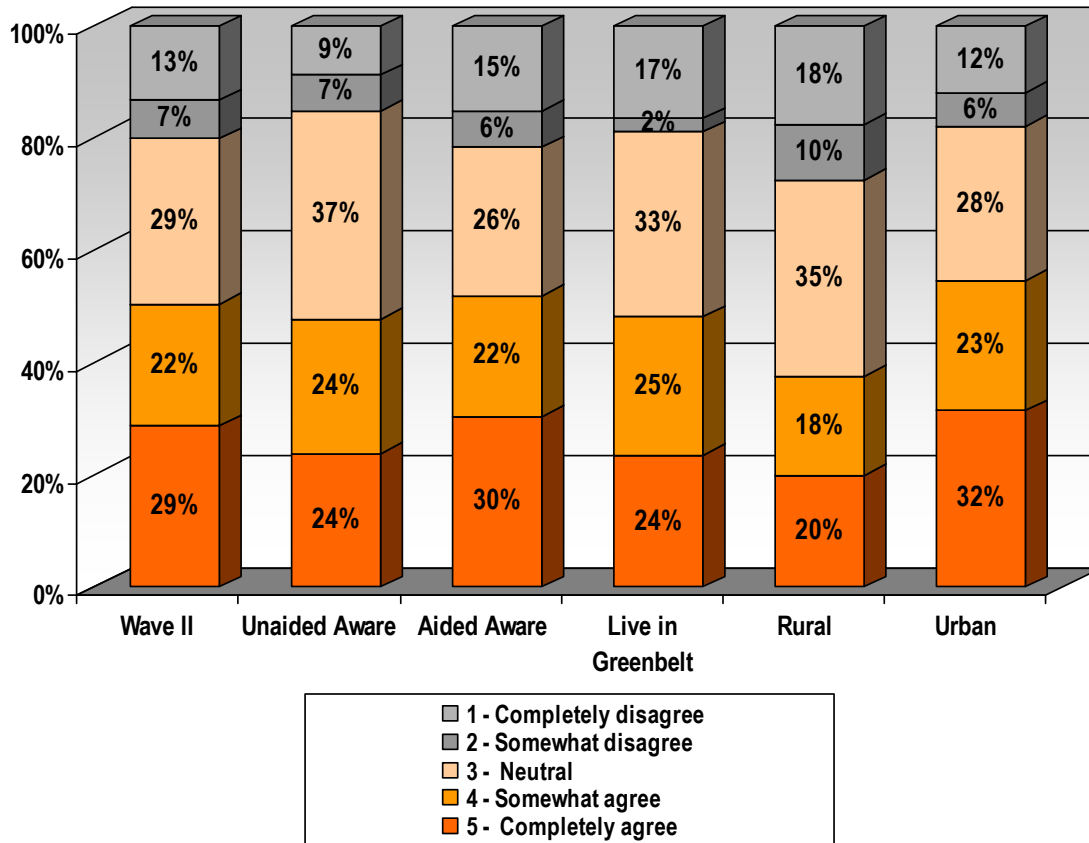
Base: Unaided or aided advertising awareness



- Half (51%) of those with advertising recall gave a rating of 5 out of 5 (29%) or 4 out of 5 (22%) in terms of the advertising making them feel more favourably towards the Greenbelt.
- Only 20% gave negative opinions (13% rated 1 out of 5, and 7% rated 2 out of 5), while 29% gave neutral opinions.
- Women were more likely than men to give favourable ratings with 59% rating 4 or 5 out of 5, compared to 45% of men.
- Although total agreement was similar, those aged 50 years or more were more likely than those aged 18-29 to give the top rating of 5 out of 5 (35% vs. 19%).



Q10f. The advertising made you feel more favourably towards the Greenbelt
 Base: Unaided or aided advertising awareness

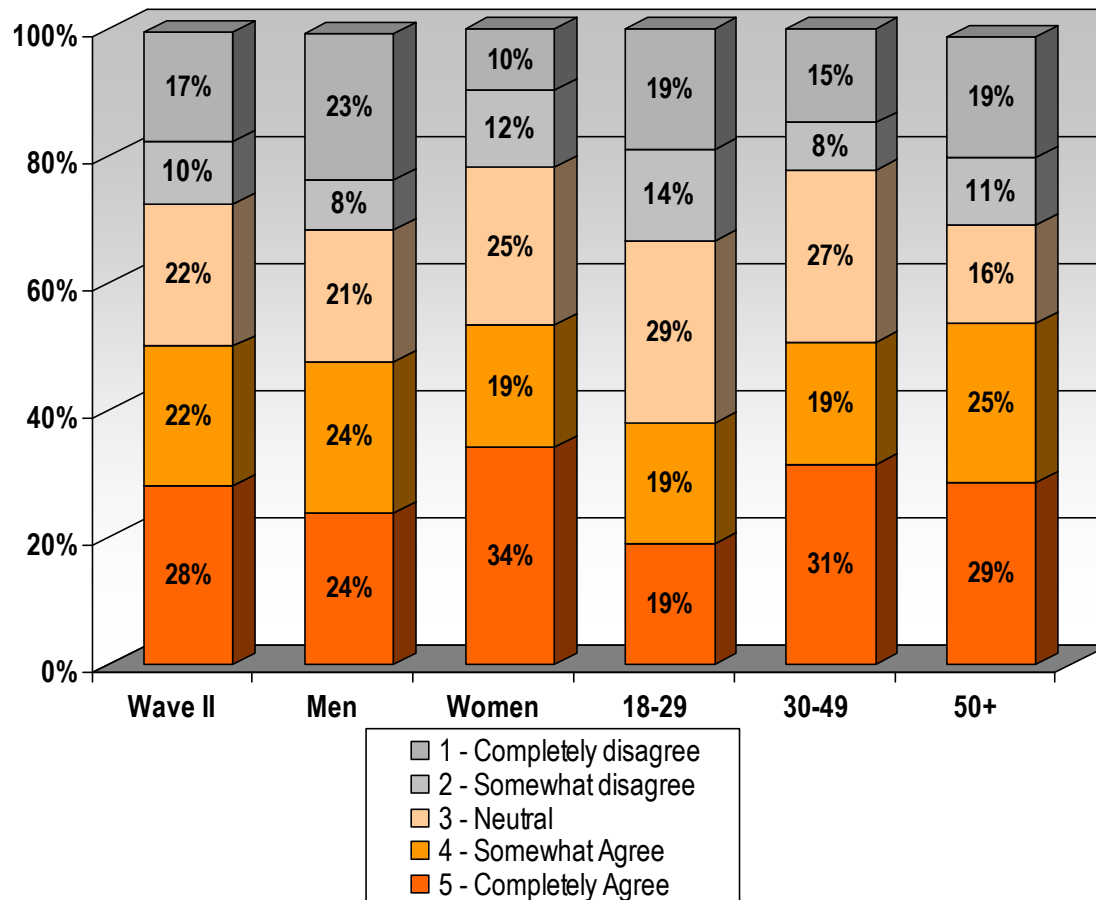


- Those living in rural areas were less likely to give favourable ratings to the statement that the advertising made them feel more favourably towards the Greenbelt, with 38% rating it 5 (20%) or 4 (18%) out of 5. In contrast, 55% of those in urban environments gave favourable ratings.



Q10g. The advertising is appropriate for people like you

Base: Unaided or aided advertising awareness

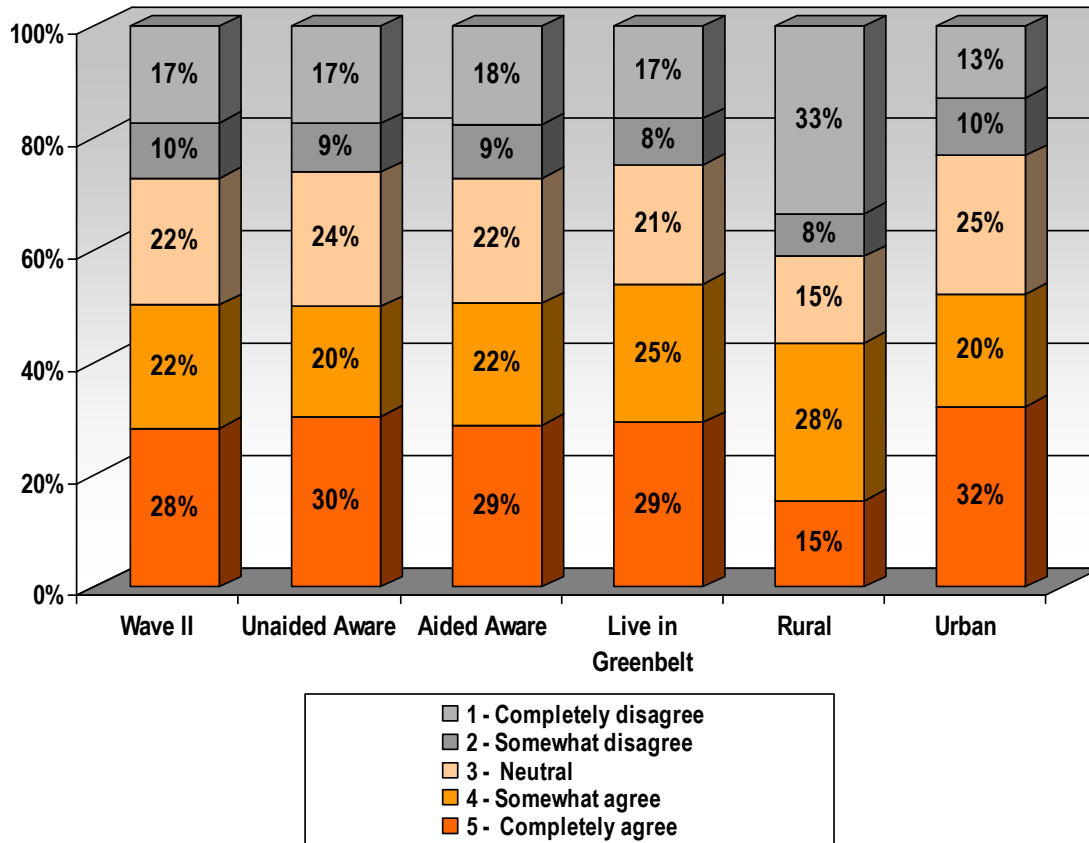


- Almost half (48%) of those with advertising recall gave a rating of 5 out of 5 (28%) or 4 out of 5 (22%) that the advertising was appropriate for people like them.
- Only 27% disagreed, with 10% giving a rating of 2 out of 5 and 17% a rating of 1 out of 5. The remaining 22% gave neutral ratings of 3 out of 3.
- Again, women were more likely than men to give favourable ratings, with 34% of women giving the top rating of 5 out of 5, compared to just 24% of men.
- Similarly, those aged 50 years or more were more likely to give the top rating of 5 out of 5 than those aged 18-29 (29% vs. 19%).



Q10g. The advertising is appropriate for people like you

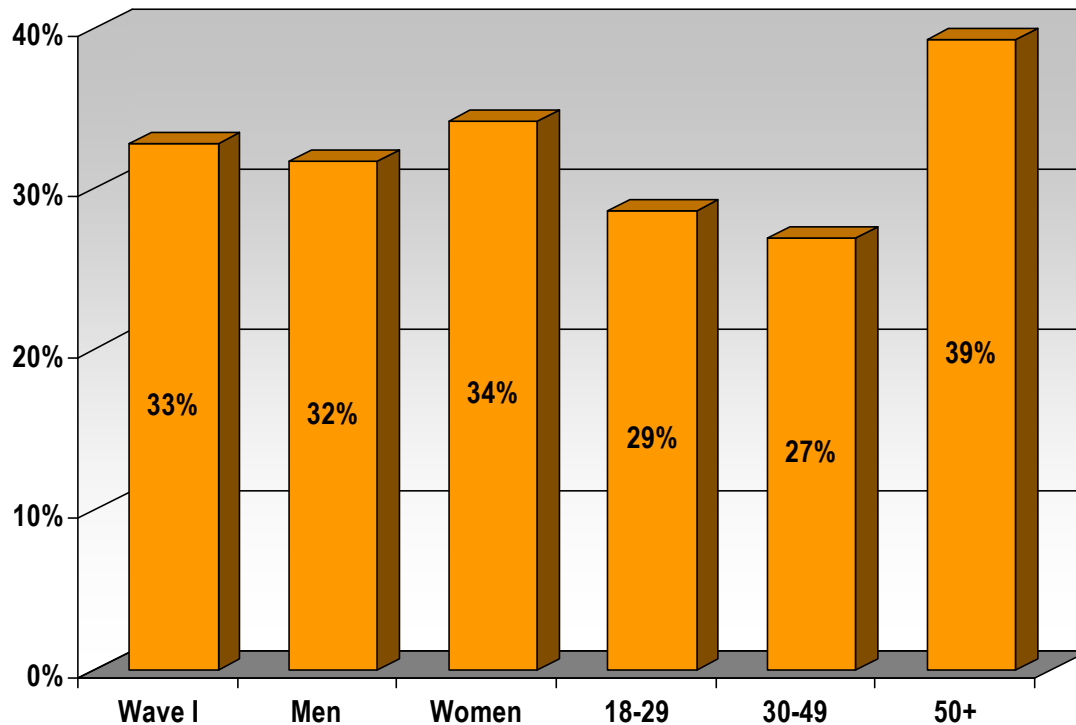
Base: Unaided or aided advertising awareness



- Across most regional and awareness measures agreement with this statement was consistent.
- However, those living in rural areas were more likely to completely disagree (33% rated 1 out of 5) that the advertising was appropriate for people like themselves.



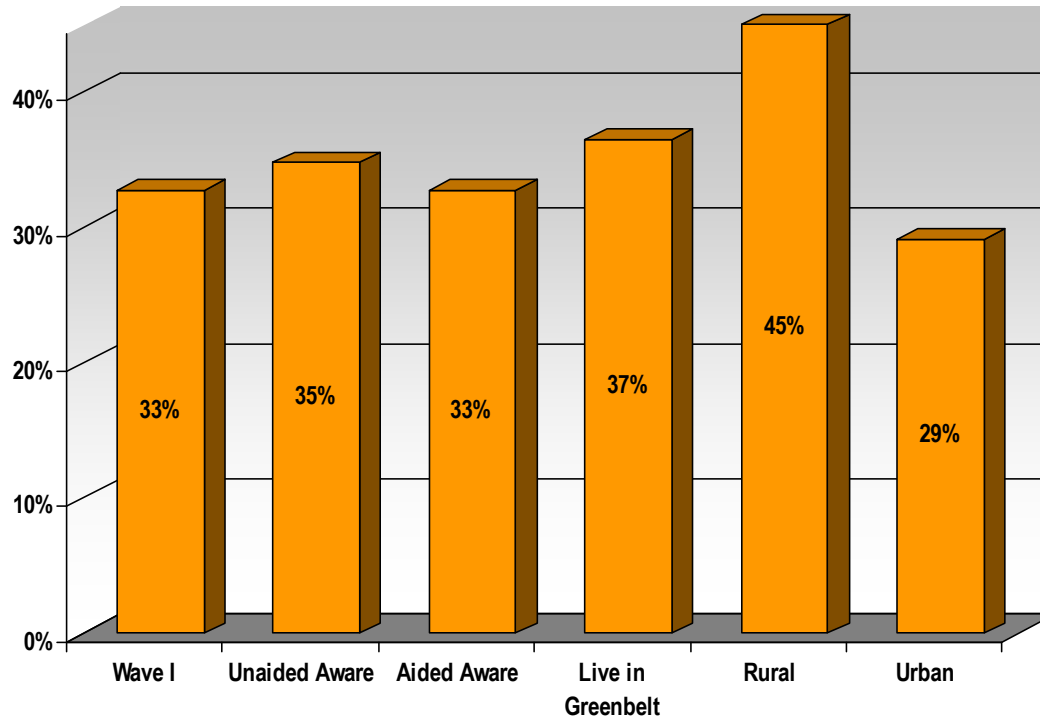
Q11. Have you mentioned or talked about any of the Greenbelt advertisements with any friends, co-workers or family members? (continued)



- When prompted, one third of those who have aided or unaided advertising awareness said they had talked about the Greenbelt advertisements with family, friends or co-workers
- Those aged 50 years or more are more likely to have discussed the advertisements (39%).
- Those with incomes above \$80,000 are more likely than those with incomes below \$40,000 to have discussed them (36% vs. 25%).



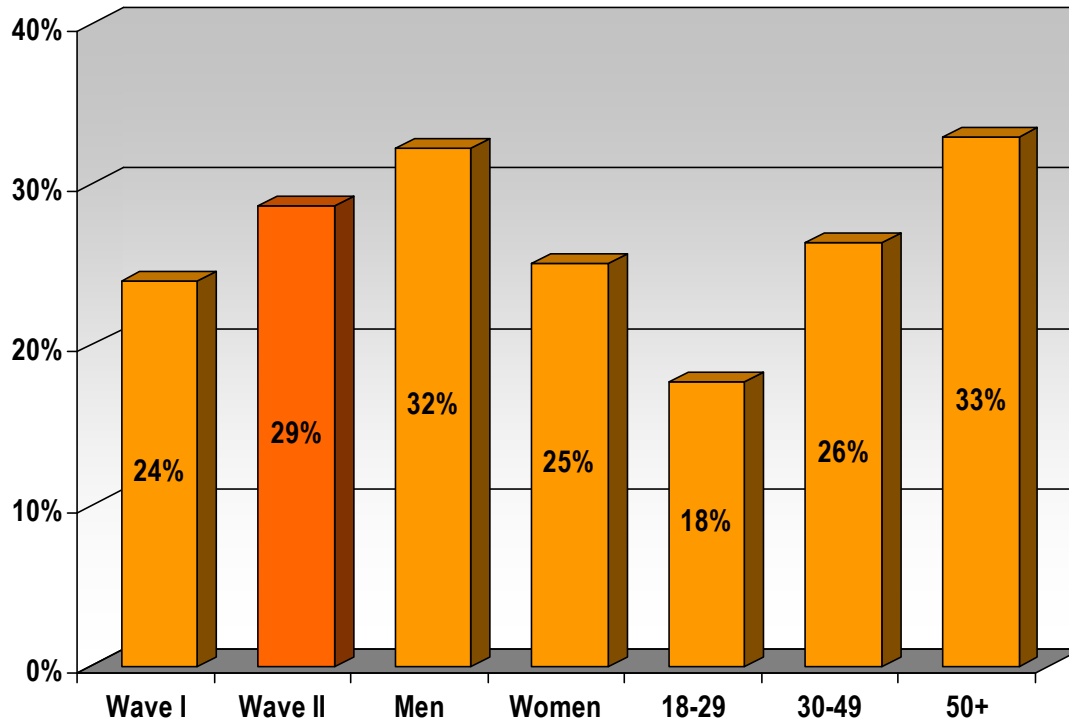
Q11. Have you mentioned or talked about any of the Greenbelt advertisements with any friends, co-workers or family members? (continued)



- Those who live in rural areas (45%) and those who say they live in the Greenbelt (37%) are more likely to say they have talked about the ads with friends, co-workers or family members.
- Those who agree that the ads were enjoyable are more likely to say they have talked about them with others (40%).



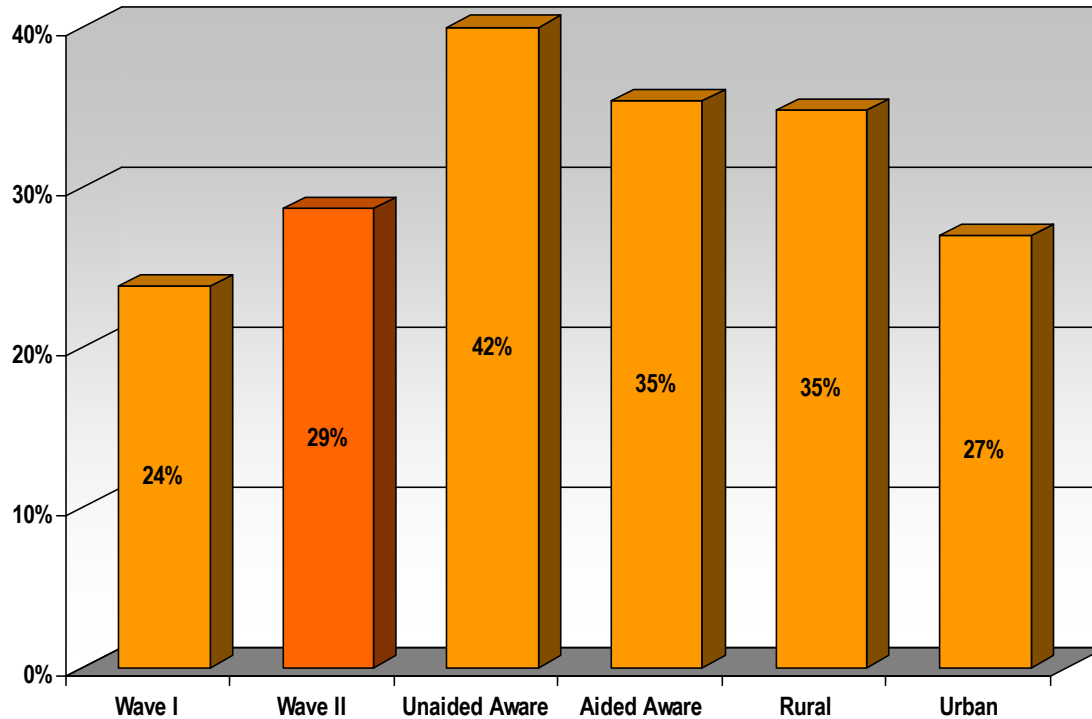
Q12. As far as you are aware, do you live in a community within the Greenbelt?



- In Wave II, 29% of respondents said they thought they lived in a community within the Greenbelt. This is up significantly from the 24% who thought the same in Wave I.
- Men are more likely than women to say they live in the Greenbelt (32% vs. 25%).
- Similarly, those aged 50 years or more are much more likely than those aged 18-29 to say they live within the Greenbelt (33% vs. 18%).
- Those with household incomes below \$40,000 are less likely to say they live within the Greenbelt (22%), while those with incomes over \$80,000 are more likely (35%).



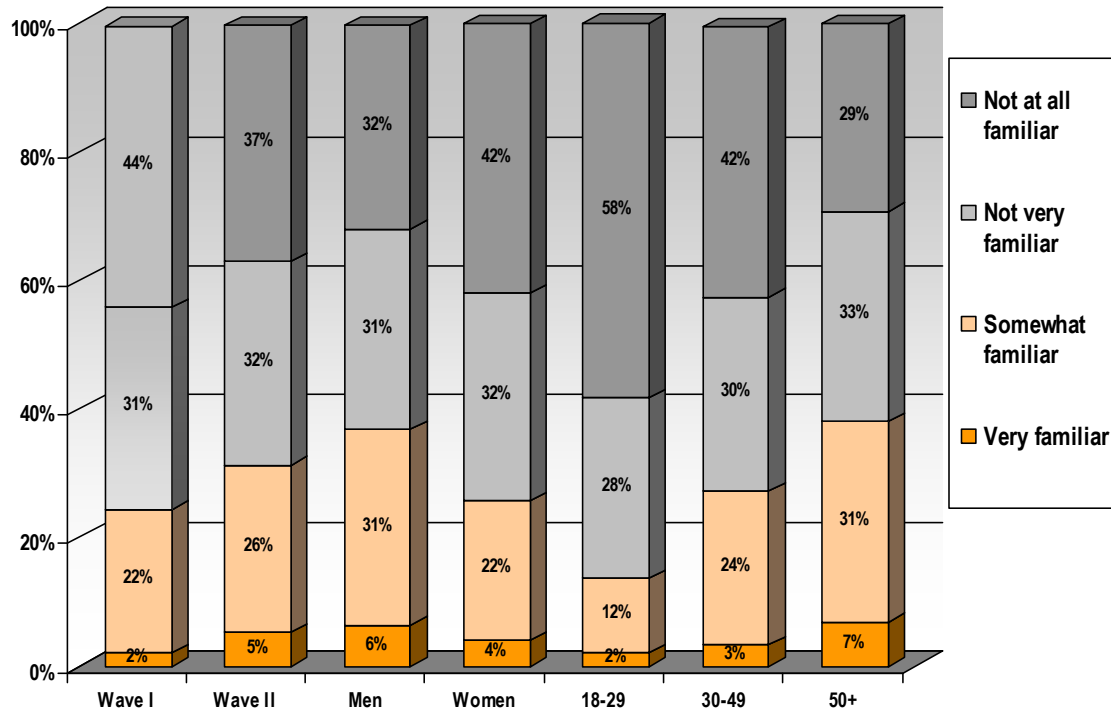
Q12. As far as you are aware, do you live in a community within the Greenbelt? (continued)



- Those with unaided (42%) or aided (39%) awareness, and those living in rural areas (35%) are more likely to say they live in a community within the Greenbelt.
- Regionally, those in Hamilton-Niagara-Brant (43%) and Dufferin-Halton-Peel (42%) are more likely to say they live within the Greenbelt. Those in Grey-Bruce (11%) and Toronto (14%) are less likely to believe they live within the Greenbelt.



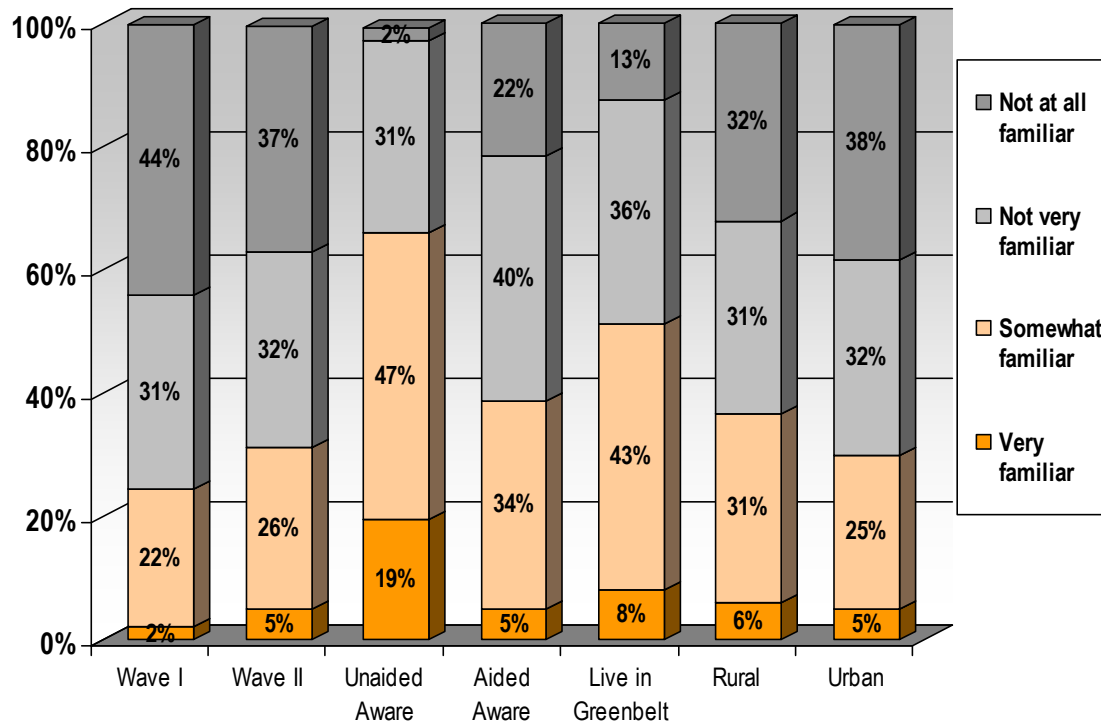
Q13. How familiar would you say you are with the issues and objectives of the Greenbelt?



- One-in-three (31%) say they are very (5%) or somewhat (26%) familiar with the issues and objectives of the Greenbelt. This is up significantly from the 24% who felt very (2%) or somewhat (22%) familiar in Wave I.
- Men are more likely than women to claim to be familiar (37% vs. 26%), and those aged 50 years or more are much more likely than those aged 18-29 to be somewhat or very familiar (38% vs. 14%).
- Those with post-graduate education are more likely to be familiar (42%).



Q13. How familiar would you say you are with the issues and objectives of the Greenbelt? (continued)



- Those with unaided awareness of the Greenbelt are much more likely than average to say they are very (19%) or somewhat (47%) familiar with the issues and objectives of the Greenbelt. This was the case in Wave I as well.
- Those with aided awareness are more likely to be very (5%) or somewhat (34%) familiar.
- Those who say they live in the Greenbelt are also more likely to be very (8%) or somewhat (43%) familiar



Q14. As far as you are aware, what are the main goals or benefits of the Greenbelt?

	Wave		Men	Women	18-29	30-49	50+
	I	II					
Protect wildlife/habitats	12	18	19	17	14	17	19
Limit urban sprawl	12	14	16	12	7	14	15
Protect farmlands	10	13	14	12	8	11	16
Protect waterways	8	13	15	11	7	9	17
Restrict growth/development	10	12	13	11	2	11	14
Protect greenspace/Greenbelt	4	6	5	6	2	8	5
Preserve/protect the environment	4	6	5	6	5	6	5
Reduce pollution	6	5	6	5	4	4	6
Other	20	16	18	14	14	15	18
Don't know/no answer	54	46	41	51	64	48	40

Note: sums to more than 100% due to more than one answer being accepted

- With low overall awareness it is not surprising that most (46%) of central Ontarians were unable to mention specific benefits or goals of the Greenbelt. However, this number is significantly lower than the 54% who couldn't answer in Wave I.
- Those aged 18-29 years are much more likely to be unable to specify any goals or benefits (64%), compared to just 40% of those aged 50+ as in Wave I.
- The most frequently mentioned benefit or goal was to 'protect wildlife/habitats', cited by 18%, up from 12% in Wave I. Other benefits include 'limiting urban sprawl' (14%) and 'restricting growth/development' (12%). 'Protecting farmlands' (13%), 'protecting waterways' (13%), and protecting greenspace (6%) were other mentions.



Q14. As far as you are aware, what are the main goals or benefits of the Greenbelt? (continued)

	Wave I	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Protect wildlife/habitats	12	18	29	22	24	19	18
Limit urban sprawl	12	14	37	16	15	14	14
Protect farmlands	10	13	42	13	17	17	12
Protect waterways	8	13	35	15	17	15	12
Restrict growth/development	10	12	24	15	17	12	12
Protect greenspace/Greenbelt	4	6	5	8	9	3	6
Preserve/protect the environment	4	6	2	7	6	6	5
Reduce pollution	6	5	9	6	6	5	5
Other	20	16	23	21	20	16	16
Don't know/no answer	54	46	6	34	27	45	46

- As in Wave I, those with unaided awareness of the Greenbelt are far more likely to be able to name specific benefits and goals. 42% cite protecting farmlands, followed by limiting urban sprawl (37%), and protecting waterways (35%).
- Those with aided awareness and those living in the Greenbelt are more likely to cite individual goals and benefits in roughly the same order as the overall population.
- Rural respondents are more likely to cite 'protecting farmlands' as a benefit (17%).

Note: sums to more than 100% due to more than one answer being accepted



Q15. As far as you are concerned, what are the potential drawbacks of the Greenbelt Act?

	Wave		Men	Women	18-29	30-49	50+
	I	II					
Limit/drive away econ dev.	4	8	10	5	4	8	8
Decreased land values	2	3	4	2	2	3	4
Reduced freedom to use property	3	3	3	2	3	2	3
Unfair to farmers/landowners	3	2	1	4	1	1	4
Fewer homes available	2	2	2	2	2	2	2
Doesn't go far enough	1	2	3	2	1	1	2
Politics of implement	2	2	3	2	0	2	2
Increased house prices	1	2	3	*	0	2	2
Cost to implement	2	2	2	1	5	*	2
Other	7	10	13	8	7	9	12
None	7	9	10	8	4	9	10
Don't know/no answer	69	63	56	70	76	66	57

Note: sums to more than 100% due to more than one answer being accepted

- When asked what they think the potential drawbacks of the Greenbelt Act are, 63% could not mention any, down from 69% in Wave I. In fact, more said there were 'none' (9%) than any other specific mention.
- The most frequently cited drawback was the limitation on, or risk of driving away economic development from the area (8%), followed by decreased land values (3%), reduced freedom to use one's property (3%) and being unfair to farmers and landowners (2%).
- Due to the low incidence of specific mentions, few significant differences are apparent by demographic groups, although 76% of those aged 18-29 were unable to give an answer compared to 58% of those aged 50 years or more.



Q15. As far as you are concerned, what are the potential drawbacks of the Greenbelt Act? (continued)

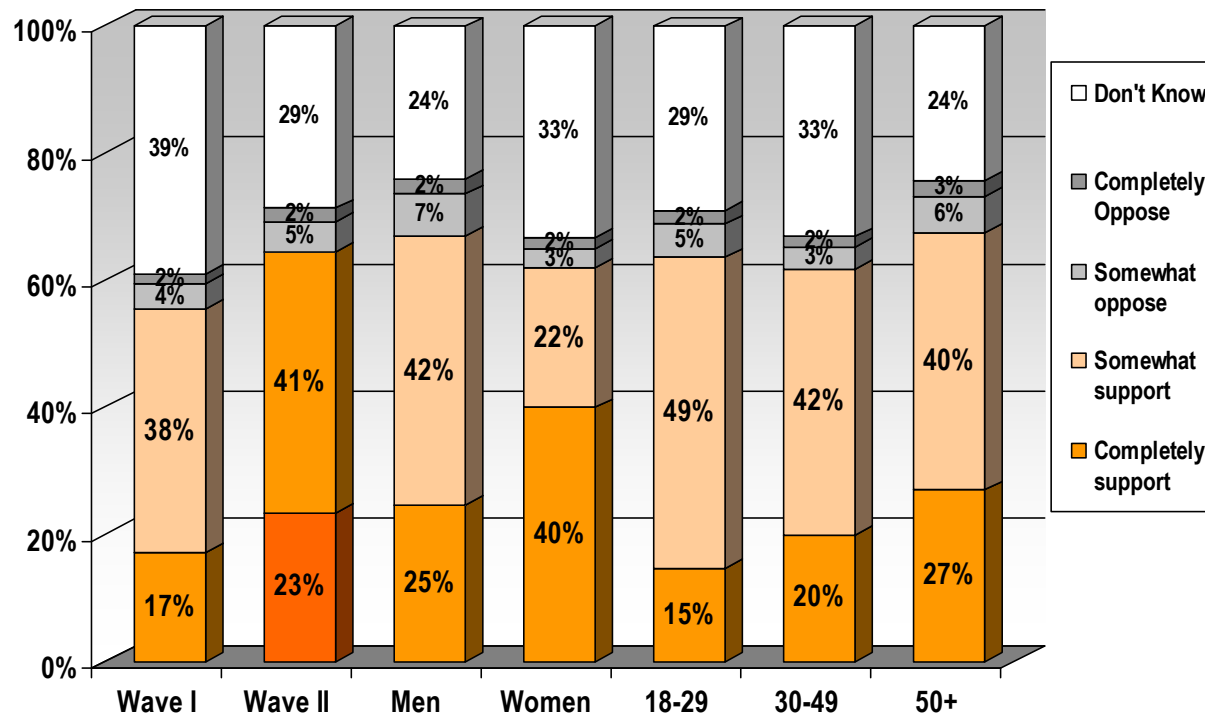
	Wave I	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Limit/drive away econ dev.	4	8	22	10	13	8	7
Decreased land values	2	3	12	4	5	6	2
Reduced freedom to use property	3	3	4	4	4	5	2
Unfair to farmers/landowners	3	2	6	3	4	4	2
Fewer homes available	2	2	6	3	3	4	2
Doesn't go far enough		2	4	3	2	1	2
Politics of implement	2	2	5	2	3	1	2
Increased house prices	1	2	8	2	2	1	2
Cost to implement	2	2	4	2	3	0	2
Other	7	10	17	13	15	14	9
None	7	9	11	12	11	8	9
Don't know/no answer	69	63	16	57	45	58	64

Note: sums to more than 100% due to more than one answer being accepted

- Those with unaided awareness of the Greenbelt are much more likely to identify potential drawbacks of the Greenbelt. 22%, up significantly from 10% in Wave I, are concerned about the impact on economic development, while 12% (vs. 8% in Wave I) mention decreased land values.
- In Wave I, being unfair to farmers (8%) and reduced freedom



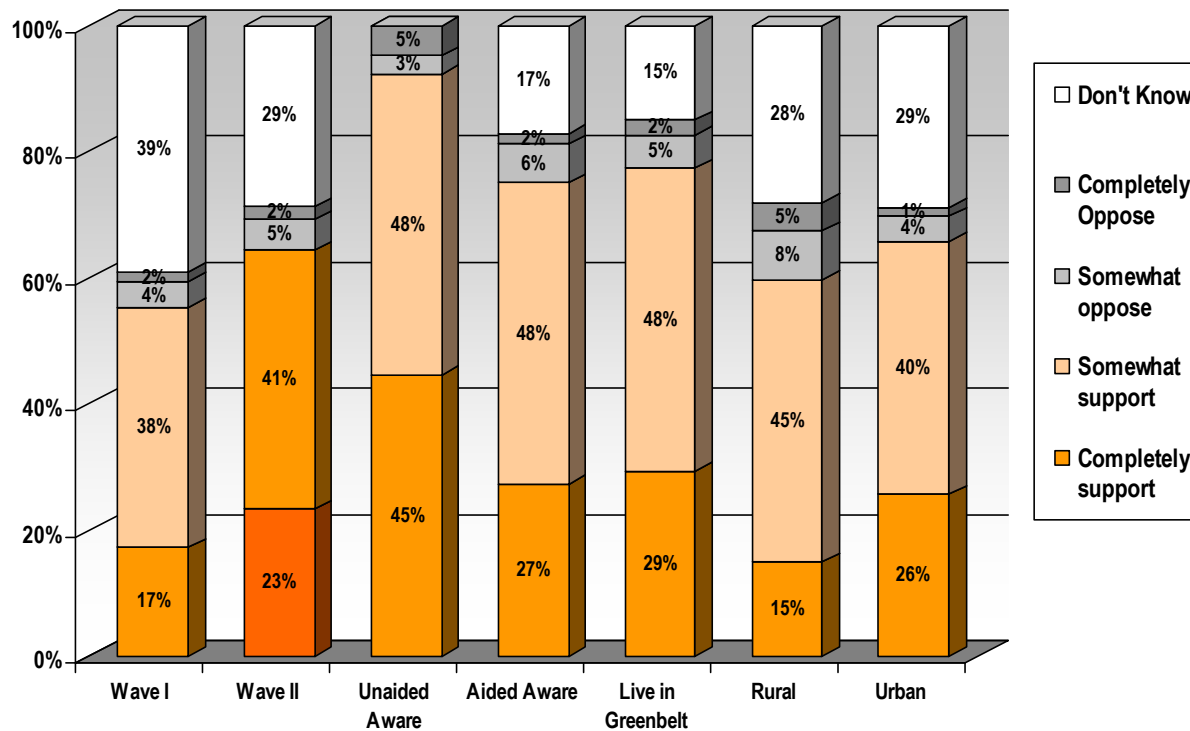
Q16. Based on what you know of the Greenbelt now, do you completely support, somewhat support, somewhat oppose or completely oppose the Greenbelt?



- Based on what they know now of the Greenbelt, 23% completely support it, up from 17% in Wave I. A further 41% somewhat support it, up from 38% in Wave I. Total support has increased from 55% to 64%. A large 29% were unable to express an opinion of their support for it, down from 39% in Wave I.
- Men are less likely than women to express complete support (25% vs. 40%), although men are more likely to say they somewhat support it (42% vs. 22%).
- Complete support is significantly higher among Ontarians aged 50 years or more than amongst those aged 18-29 (27% vs. 15%).



Q16. Based on what you know of the Greenbelt now, do you completely support, somewhat support, somewhat oppose or completely oppose the Greenbelt? (Continued)



- Those with unaided awareness of the Greenbelt are much more likely than average to say they completely support (45%) support or somewhat support (48%) the Greenbelt. These figures are up significantly for this group compared to Wave I (34% and 44% respectively).
- Those with aided awareness (27%) and those living in the Greenbelt (29%) are more likely to say they completely support it.
- Those living in rural areas are more likely to say they oppose the Greenbelt (13% vs. 6% overall).



The following pre-amble was read to respondents prior to Q17.

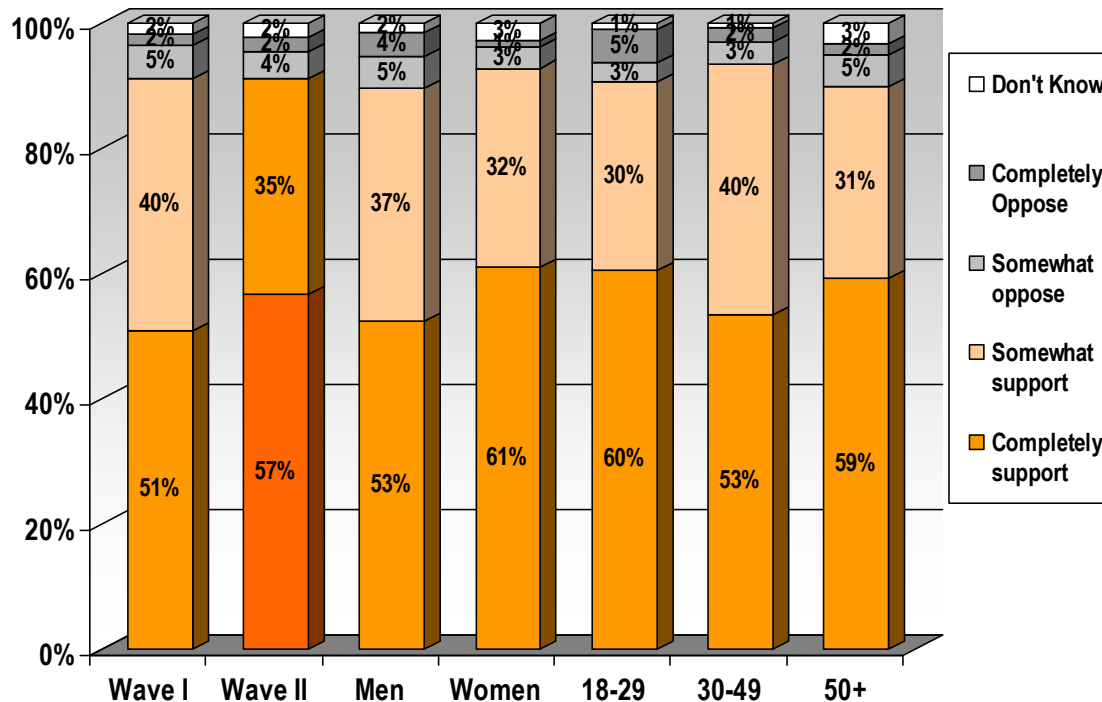
READ: The Greenbelt was created to permanently protect about 1.8 million acres of environmentally sensitive and agricultural land surrounding Toronto.

Covering an area larger than Prince Edward Island, the Greenbelt will stretch from Niagara Falls, around the Golden Horseshoe as far north as southern Lake Simcoe, and will extend almost to Peterborough in the east. It will include the Niagara Escarpment, the Oak Ridges Moraine and the Rouge River. The size of the Greenbelt could be increased in the future, but it could never be decreased.

Land within the Greenbelt will be protected from future urban development and sprawl. For urban communities within the Greenbelt Plan, substantial areas have been set aside to enable municipalities to accommodate growth over the long term. Lands will not be expropriated or acquired by the province, but will be protected by planning and conservation methods



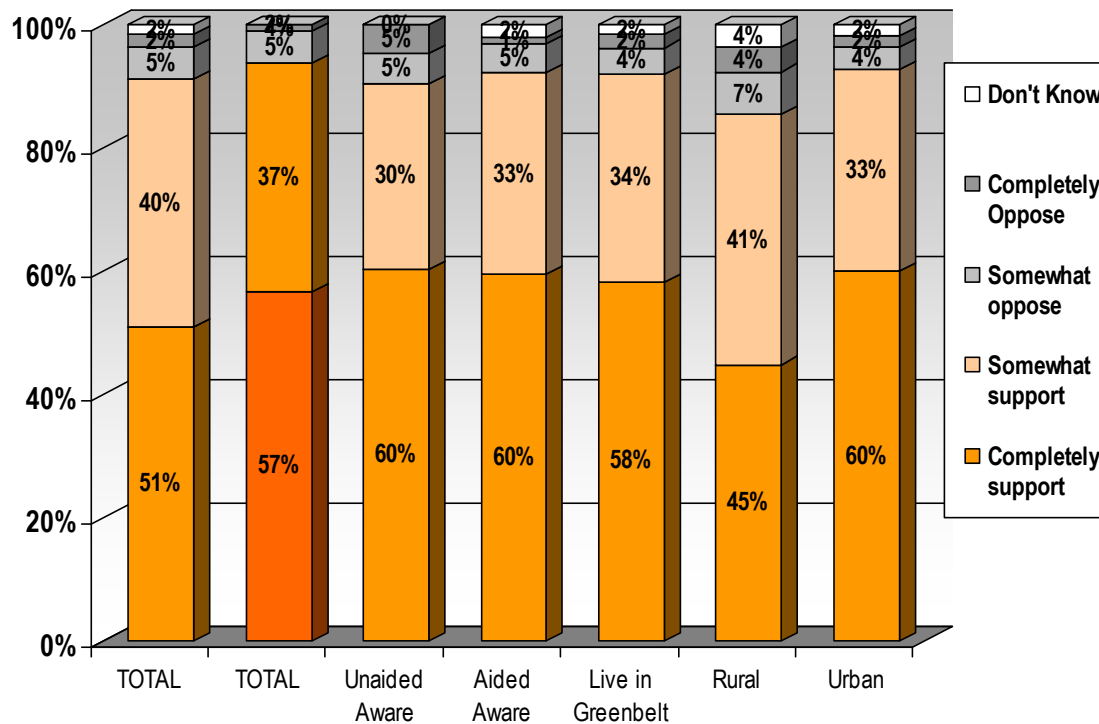
Q17. Based on this description, do you completely support, somewhat support, somewhat oppose or completely oppose the Greenbelt?



- Based on the description, support for the Greenbelt jumps dramatically with almost six in ten (57%) now completely supporting it, up from 51% in Wave I.
- Only 5% somewhat oppose it and a very small 2% completely oppose it. The percentage who say they cannot answer the question drops to just 2%. These figures are unchanged from Wave I.
- Support is significantly higher across all demographic groups, but is especially pronounced amongst the 18-29 year old group who previously had difficulty answering or given somewhat supportive responses.



Q17. Based on this description, do you completely support, somewhat support, somewhat oppose or completely oppose the Greenbelt? (Continued)



- With the read description of the Greenbelt, support for it rises across all geographic groups as well, with 60% of those with aided or unaided awareness now completely supporting it, up from 55% for both groups in Wave I.
- Those in rural areas are less likely to completely support it (45%), and are more likely to oppose it (11%).
- Support is slightly stronger in York-Durham (61% completely support) and Toronto (68%), than in Grey-Bruce (40%).



Q17. Based on this description, do you completely support, somewhat support, somewhat oppose or completely oppose the Greenbelt? (Continued)

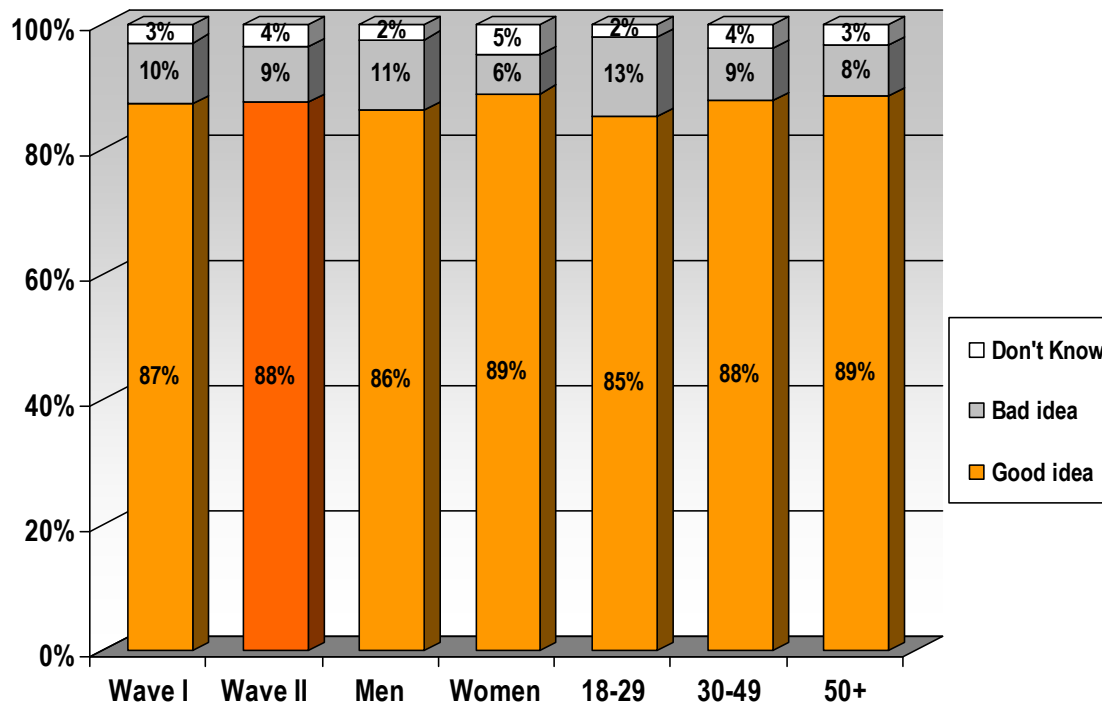
Subsequent Support	Initial Support					
	Total	Completely support	Somewhat support	Somewhat oppose	Completely oppose	Don't know
%	100	23	41	5	2	29
Completely support	57	89	53	8	19	47
Somewhat support	35	10	43	46	14	41
Somewhat oppose	4	0	2	35	24	4
Completely oppose	2	0	1	10	38	2
Don't know/no answer	2	0	0	0	5	6

- Among the 23% who completely supported the Greenbelt initially, 89% maintained the same level of support after the statement was read. 10% declined to 'somewhat support'.
- Among the 41% who somewhat supported the Greenbelt initially, 43% maintained the same level of support, but more (53%) actually *increased* their support to 'completely'.
- Among the 5% who somewhat opposed the Greenbelt initially, 35% maintained the same stance afterwards, but more (46% 'somewhat support', 8% 'completely support') *increased* their support.
- Among the very small 2% who completely opposed the Greenbelt, 38% maintained the same stance afterwards but 24% softened to 'somewhat oppose', and 14% moved to 'somewhat support', while 19% changed to 'completely support'.
- Among the large 29% who could not express an opinion initially, 47% changed to 'completely support' and 41% to 'somewhat support' after the statement was read. Only 4% changed to 'somewhat oppose' and 2% to 'completely oppose'. Just 6% remained unable to answer.



Q18. READ: "Some believe that the creation of the Greenbelt is a good idea because they believe limiting growth will protect green spaces, reduce urban sprawl and encourage people to take transit instead of their own private cars. Others think it is a bad idea because they believe that limiting growth will result in higher housing prices, higher housing densities in existing communities and more traffic gridlock. Based on this, which of these views is closer to your own?"

Based on this description, do you think the creation of the Greenbelt is a good idea or a bad idea?

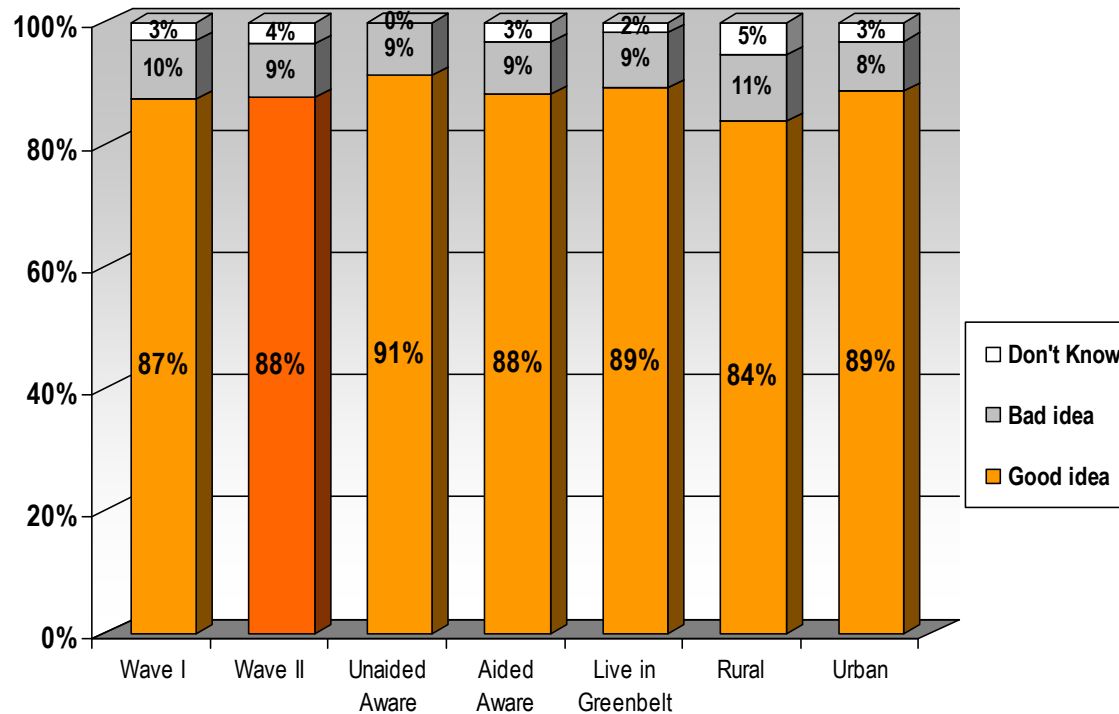


- Following closely immediately after the question explaining the purpose of the Greenbelt and support for it, it is not surprising that the vast majority (88%) believe the creation of the Greenbelt is a good idea. This is unchanged from Wave I (87%).
- Only 9% feel that the potential drawbacks of the Greenbelt make it a bad idea.
- Support is consistent across most demographic groups.



Q18. READ: "Some believe that the creation of the Greenbelt is a good idea because they believe limiting growth will protect green spaces, reduce urban sprawl and encourage people to take transit instead of their own private cars. Others think it is a bad idea because they believe that limiting growth will result in higher housing prices, higher housing densities in existing communities and more traffic gridlock. Based on this, which of these views is closer to your own?"

Based on this description, do you think the creation of the Greenbelt is a good idea or a bad idea?



- The percentage thinking the creation of the Greenbelt is a good idea is strong in all geographic areas, including those who live within the Greenbelt, 89% of whom think the creation of it is a good idea.
- Those in rural areas are more likely to oppose it (16%).



Q19. For you personally, which of the following is the most important benefit of the Greenbelt?

	Wave		Men	Women	18-29	30-49	50+
	I	II					
Protecting the natural water system	27	28	27	24	23	24	31
Protecting wildlife habitats	21	21	19	23	29	26	16
Preserving agricultural lands	21	19	16	22	20	16	22
Limiting urban sprawl	14	14	17	10	14	13	13
Creating a single, continuous beltway	9	11	12	10	12	12	10
Providing recreational/tourism ops	4	4	5	2	2	5	3
Don't know/no answer	3	4	4	4	1	2	5

- When asked which is the most important benefit of the Greenbelt, most of the probed mentions had strong support. Over a quarter (28%) said 'protecting the natural water system', followed by 21% who said 'protecting wildlife habitats,' and a further 19% who said 'preserving agricultural lands.'
- 14% cited 'limiting urban sprawl. More distantly, 11% cited 'creating a single, continuous beltway of protected green space' and 4% said 'providing recreation and tourism opportunities' was most important.
- These patterns are unchanged from Wave I.



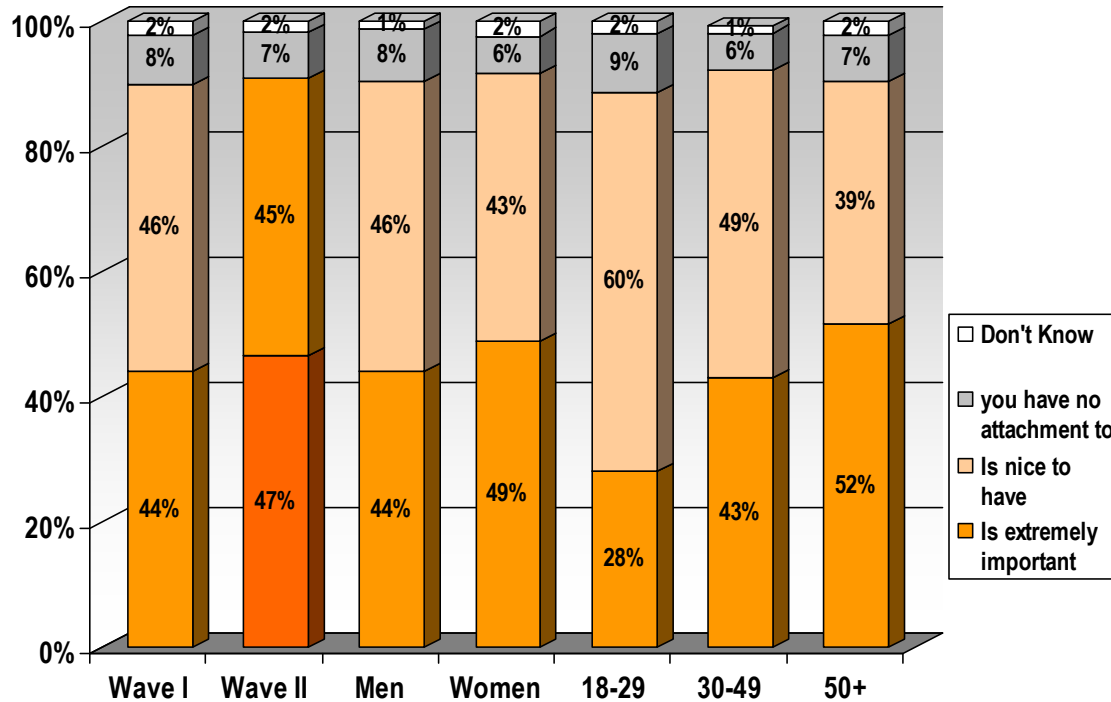
Q19. For you personally, which of the following is the most important benefit of the Greenbelt? (Continued)

	Wave I	Wave II	Unaided Aware	Aided Aware	Live in Greenbelt	Rural	Urban
Protecting the natural water system	27	28	23	29	26	31	27
Protecting wildlife habitats	21	21	15	21	20	15	23
Preserving agricultural lands	21	19	13	20	22	28	17
Limiting urban sprawl	14	14	22	14	16	14	13
Creating a single, continuous beltway	9	11	16	11	12	5	13
Providing recreational/tourism ops	4	4	6	2	2	3	4
Don't know/no answer	3	4	6	3	3	3	4

- Those with unaided awareness are much more likely to say the most important benefit is 'limiting urban sprawl (22%),' and are less likely to say 'protecting wildlife habitats (15%)' or preserving agricultural lands (13%).'
- Those in rural areas are more likely to say the most important benefit is preserving agricultural lands (28%), unchanged from Wave I.



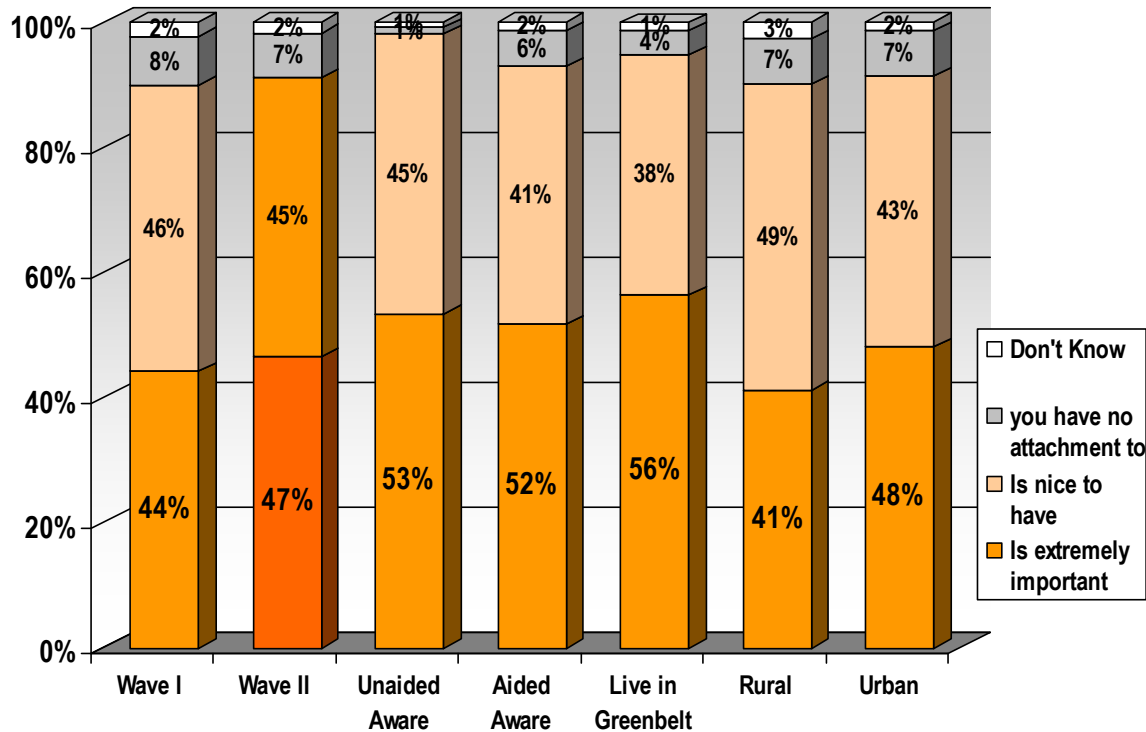
Q20. Is the Greenbelt something that: i) is extremely important to you personally, ii) is nice to have but not something that is crucial to you and your family, or iii) you really have no attachment to and don't really care much about?



- Almost half (47%) of central Ontarians say the Greenbelt is something that is extremely important to them personally, up from 44% in Wave I. A further 45% say it is nice to have but is not something that is crucial to them and their families. Only 7% say they really have no attachment to it and really don't care much about it.
- Those aged 50 years or more are more likely to say it is something that is extremely important to them, while those aged 18-29 years are less likely (52% vs. 29%).
- Those with post-grad (57%) education are more likely than those with high school or less (38%) to say it is extremely important to them. The latter are more likely to say it is something they don't really care about (15%).



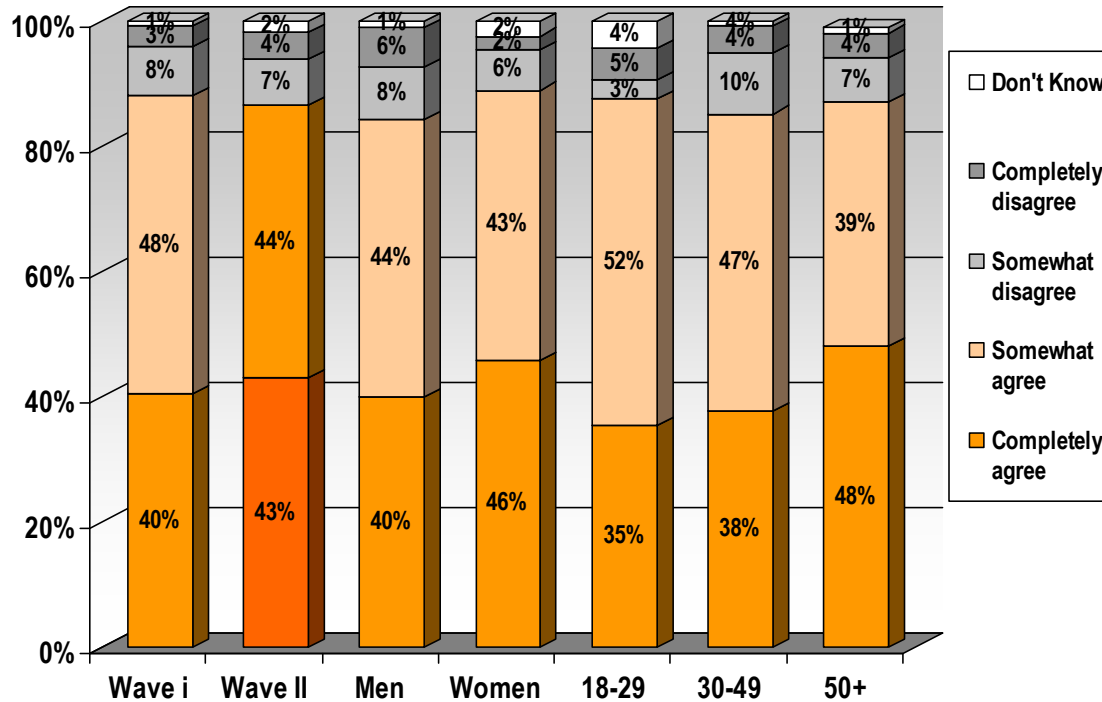
Q20. Is the Greenbelt something that i) is extremely important to you personally, ii) is nice to have but not something that is crucial to you and your family, or iii) you really have no attachment to and don't really care much about?



- Those with unaided awareness (53%) and those living in the Greenbelt (56%) are more likely to say they Greenbelt is something that is extremely important to them.
- Those living in rural areas are more likely to say it is nice to have but not something that is crucial (49%).



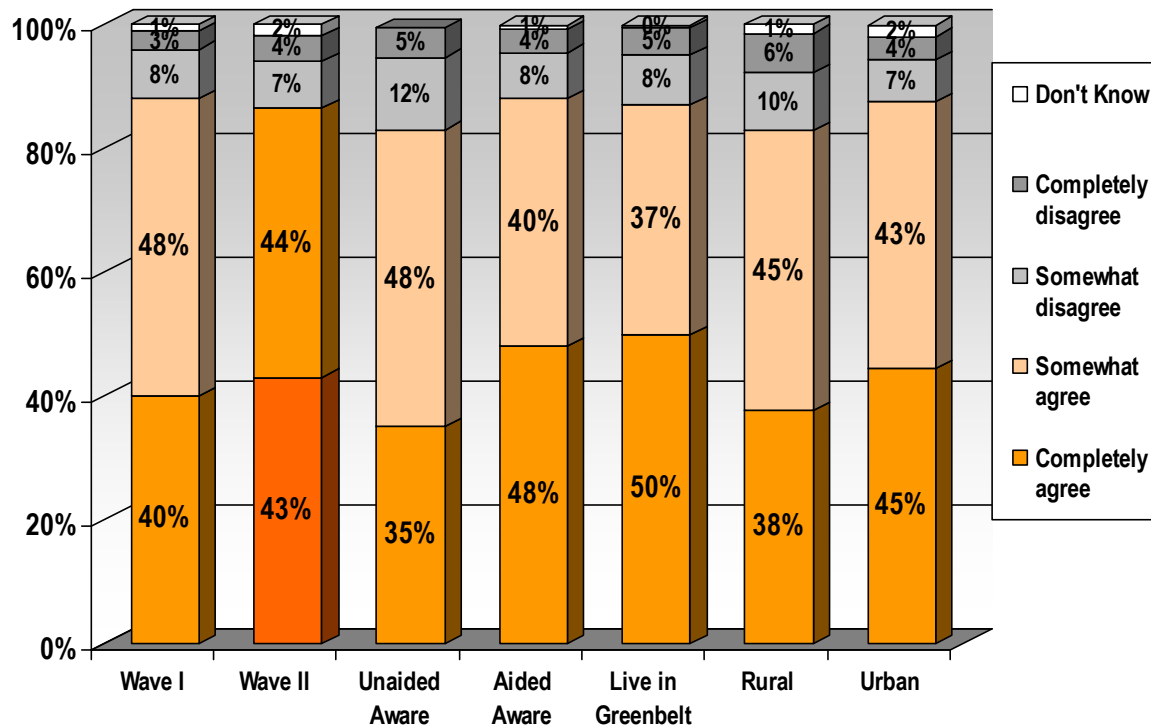
Q21.a) The Greenbelt is one of the most important contributions of our generation to the future of Ontario



- Nine-in-ten (87%) central Ontarians completely agree (43%) or somewhat agree (44%) that the Greenbelt is one of the most important contributions of our generation to the future of Ontario. Only 12% somewhat (7%) or completely (4%) disagree. These figures have changed little since Wave I.
- Those aged 50 years or more are more likely than those aged 18-29 to completely agree with this statement (48% vs. 35%).
- Those with household incomes below \$40,000 are more likely to agree completely (45%) than those earning \$80,000 or more (41%).
- Those born outside of Canada are more likely to completely agree (45%).



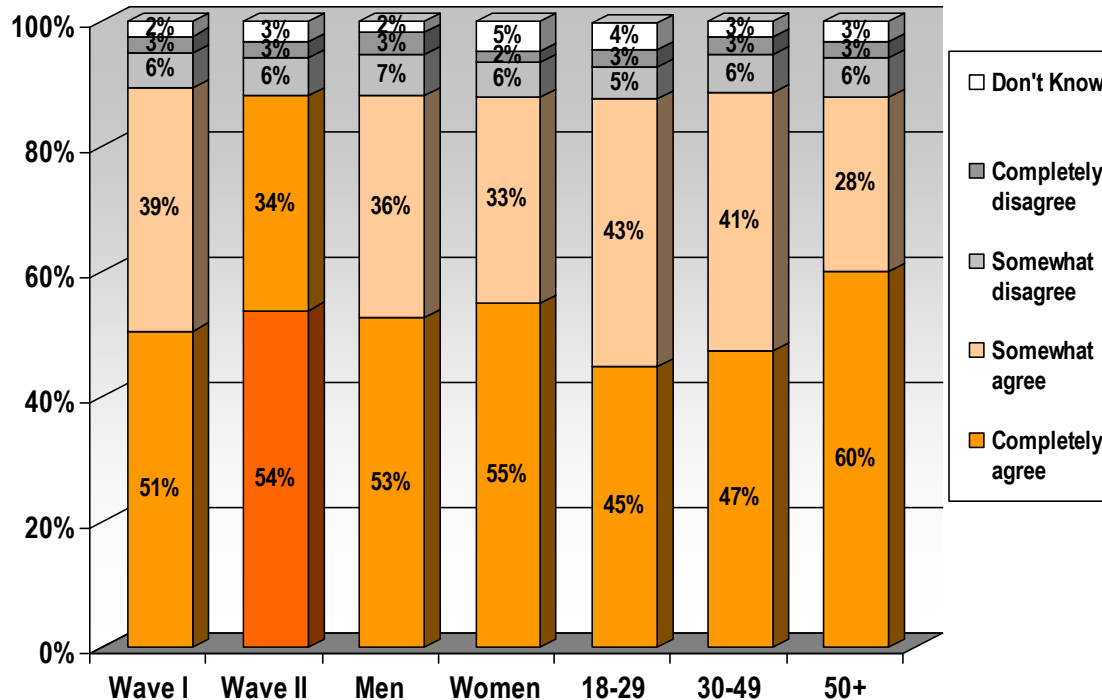
Q21.a) The Greenbelt is one of the most important contributions of our generation to the future of Ontario



- Those living in the Greenbelt (50%), and those with aided awareness (48%) are more likely to agree completely that it is one of the most important contributions of our generation to the future of Ontario.
- Regionally, those in Toronto (48%) are more likely to completely agree.



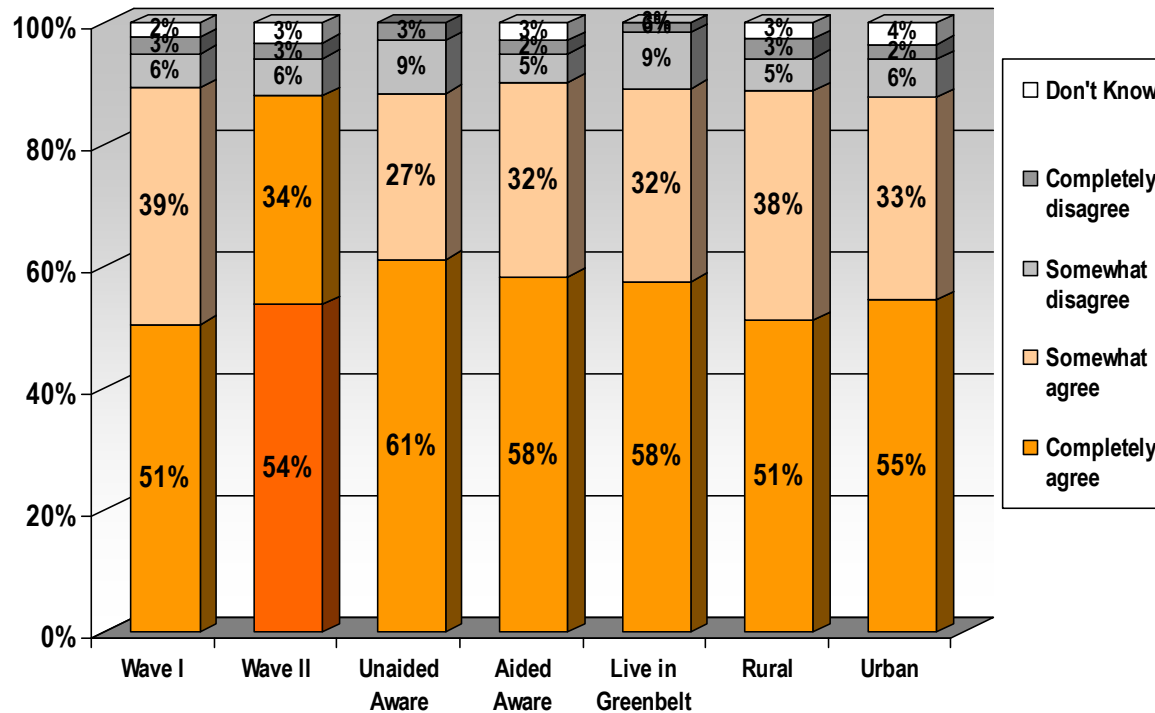
Q21.b) Urban growth can be accommodated by making more efficient use of existing urban lands rather than allowing them to encroach on the Greenbelt lands



- Nine-in-ten (88%) central Ontarians completely agree (54%) or somewhat agree (34%) that urban growth can be accommodated by making more efficient use of existing urban lands rather than allowing them to encroach on the Greenbelt lands. Only 9% somewhat (6%) or completely (3%) disagree. These figures are not significantly different from Wave I.
- Those aged 50 years or more are more likely to completely agree (60%) while those aged 18-29% are less likely (45%).



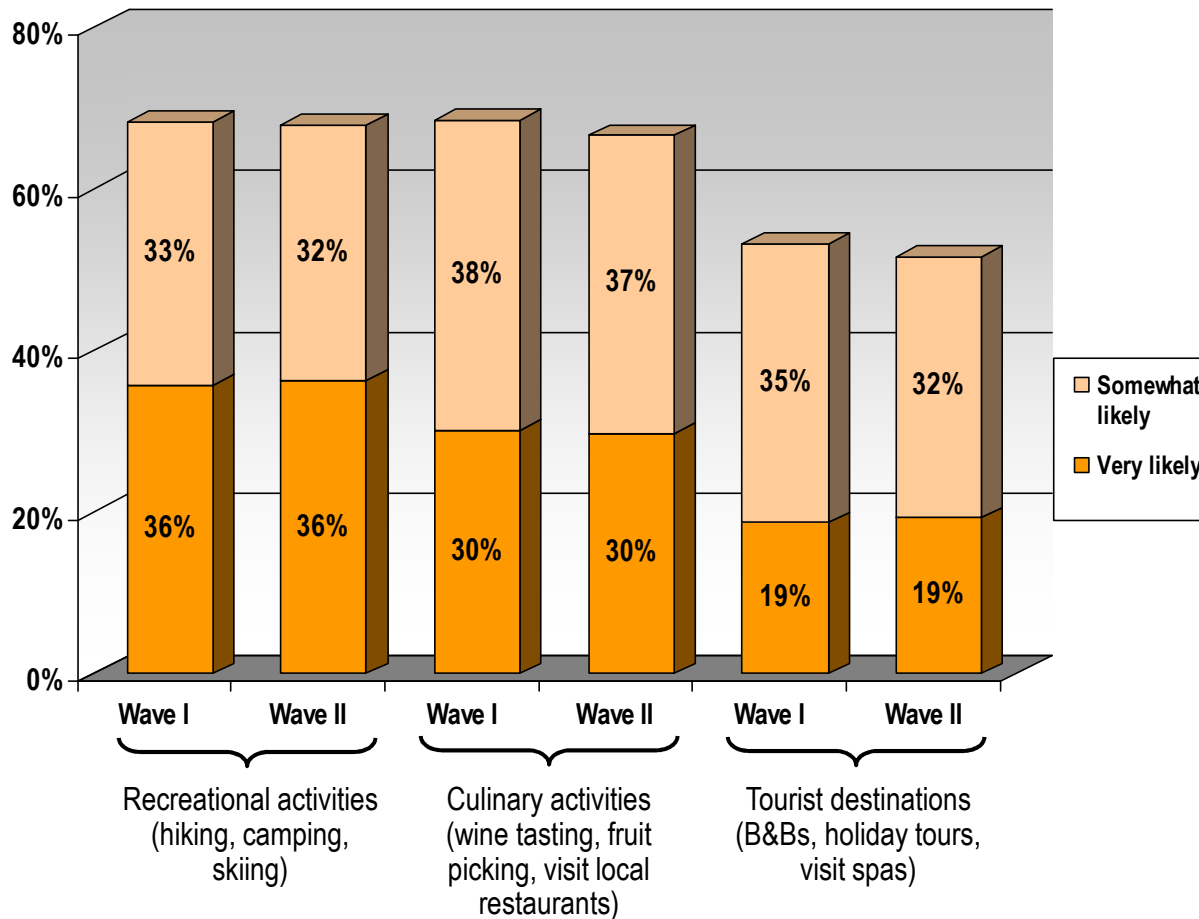
Q21.b) Urban growth can be accommodated by making more efficient use of existing urban lands rather than allowing them to encroach on the Greenbelt lands



- Those with unaided awareness of the Greenbelt (61%) and those who live in the Greenbelt (58%) are more likely to strongly agree that urban growth can be accommodated through the more efficient use of existing urban lands rather than allowing them to encroach on the Greenbelt lands.
- Those in Hamilton-Niagara-Brantford are less likely to strongly agree (45%) that urban growth can be accommodated through more efficient use of existing lands.



Q22. How likely would you be to visit the Greenbelt to participate in the following types of activities...



- Unchanged from Wave I, two-thirds (68%) of central Ontarians are very (36%) or somewhat likely (32%) to say they would visit the Greenbelt to participate in recreational activities like hiking, camping or skiing. Those very likely include: those with children (44%), those with post-secondary education (54%), those with household incomes over \$80,000 (50%) and those with unaided awareness of the Greenbelt (48%)
- Also unchanged, 67% are very (30%) or somewhat likely (37%) to say they would visit the Greenbelt to participate in culinary activities like wine tasting, fruit picking, or visiting local restaurants. Those very likely include post-grads (37%), those earning \$80,000 or more (40%), and those living in the Greenbelt (38%)
- Just over half (51%) are very (19%) or somewhat likely (32%) to say they would visit the Greenbelt for tourist destinations like bed and breakfasts, holiday tours or spas. Those very likely include 30-49 year olds (22%), those earning \$60-\$80,000 (25%), and those living in Toronto (24%).



Rural patterns

- Rural respondents in Wave I and Wave II showed similar overall levels of concern regarding the environment as average (44% very concerned, 47% somewhat concerned)
- In both waves they were slightly more likely to have unaided awareness of the Greenbelt (10% in Wave I, 14% in Wave II), and are more likely to have unaided awareness of Greenbelt advertising (7% vs. 4% for urban).
- Total awareness of the Greenbelt among rural residents was 74% in Wave I and 71% in Wave II (it rose from 57% to 69% among urban residents).
- In both Wave I (37%) and Wave II (39%) they were more likely to have seen news stories about the Greenbelt in the media (27%/35% among urban respondents).
- 31% in Wave I and 37% in Wave II claim to be somewhat or very familiar with the issues of the Greenbelt (23%/30% among urban)
- In both Wave I (41%) and Wave II (42%), rural respondents were more likely to cite specific drawbacks of the Greenbelt than urban respondents (28%/36%). In Wave I, unfair to farmers (8%) and reduced freedom to use one's property (6%) were the top mentions among rural respondents. In Wave II, limiting economic development (8%) and decreased land values (6%) were the top mentions.
- In Wave I, initial support was 63%, with 19% completely supporting it. In Wave II, support dropped to 60% with 15% completely supporting it. Urban support went from 54% to 66%.
- After the pre-ambule was read, 11% of rural respondents in Wave I were opposed, compared to 7% of urban respondents. In Wave II, 11% and 6% were opposed respectively, reinforcing the greater opposition in rural areas.



Conclusions

Conclusions:

- As expected, data collected at the close of the advertising campaign shows a marked increase in awareness, understanding and favourability towards the Greenbelt. The proportion of people unable to formulate opinions has decreased on most open-ended measures. More even claim they live in the Greenbelt, perhaps reflecting a greater desirability of wanting to live there.
- Those who saw or heard the advertising campaign reacted favourably towards it. Most were able to recall where they saw it and describe the content accurately. While many didn't feel that it told them anything new about the Greenbelt, most felt that it was believable and made them feel more favourably towards the Greenbelt. Most feel it is appropriate for people like themselves and very few are getting tired of it.
- Certain groups (older Ontarians, those in rural areas or near the Greenbelt) are much more concerned about the environment and knowledgeable about the Greenbelt. Younger Ontarians should be targeted since their level of knowledge and concern is consistently lower than older Ontarians.
- In this Wave, rural respondents express more negativity towards the Greenbelt. They claim greater familiarity with the issues surrounding the Greenbelt and express greater opposition and concern for the potential drawbacks, particularly reduced land values and freedom to use their property as they see fit.



Questions? Contact:

David MacDonald
Group Vice President, Consumer Research

Environics Research Group Inc.
33 Bloor Street East, Suite 900
Toronto, Ontario, M4W 3H1

Tel: 416.969.2814
Fax: 416.920.3299
E: david.macdonald@environics.ca

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