



# **Greenbelt Foundation Awareness Measurement Summer 2010**

*Summary prepared by:*

# Methodology

## Methodology:

- A total of 750 interviews were conducted by telephone between June 9-15, 2010. A sample of this size can be considered accurate to within +/-3.6 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:

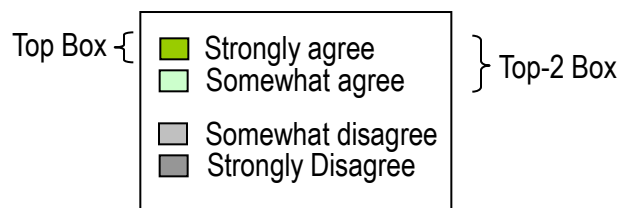
Region:	Sample Size	Target Urban	Target Rural
Toronto (416)	200	200	0
York	90	84	6
Durham	60	53	7
Dufferin	50	33	17
Peel	80	77	3
Halton	60	56	4
Brant	50	42	8
Hamilton	60	55	5
Niagara	50	44	6
Simcoe	50	36	14
<b>TOTAL</b>	<b>750</b>	<b>680</b>	<b>70</b>

# Reporting & Analysis

## Reporting Framework:

- Results in this report are analyzed by unweighted data, highlighting key differences by respondent demographics and awareness of the Greenbelt.
- Consistently, for multi-item scales using 4-point agreement scales, few top 2-box differences (e.g. strongly agree + somewhat agree) were seen across most categories of respondents.

To help the Friends of the Greenbelt Foundation better understand where support and interest is strongest, this report focuses on the differences among the top-box respondents (e.g. strongly agree). Users should remember that total agreement would include the second-box respondents as well.



- In most charts the "Don't Knows" are generally suppressed, unless they account for more than 10% of responses

# Demographic Profiles:

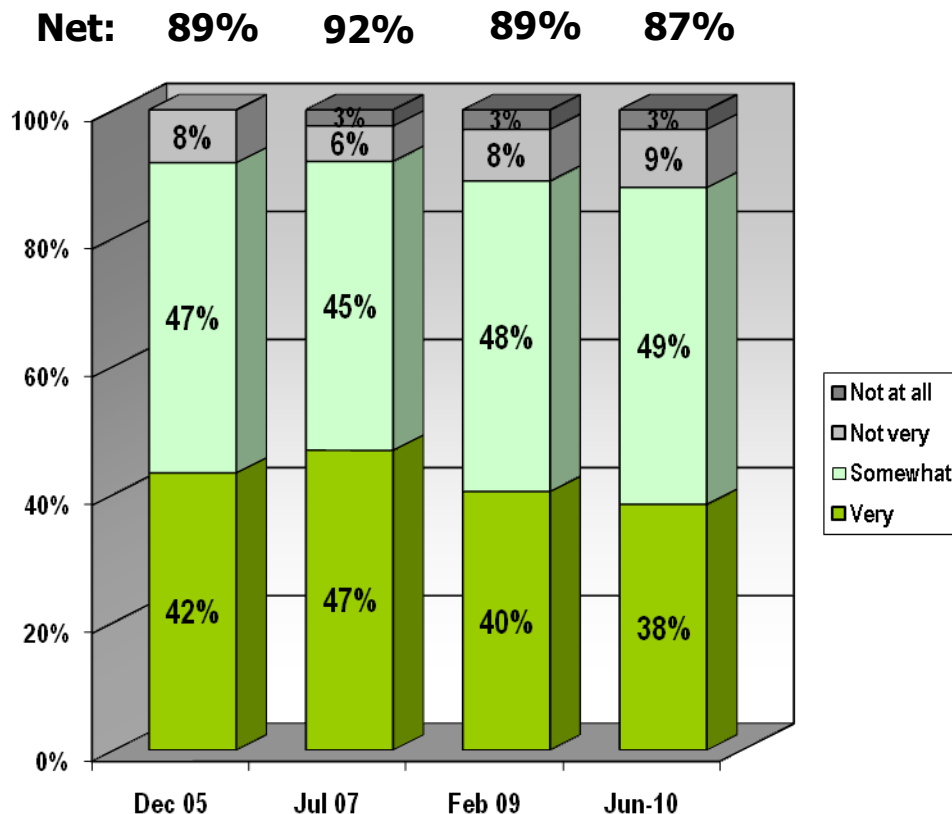
	Greenbelt Post 2010	Greenbelt Wave II 2009	Typical Ont. Sample		Greenbelt Post 2010	Greenbelt Wave II 2009	Typical Ont. Sample
Gender:				Education:			
Male	46%	50%	48%	HS/less	20%	20%	39%
Female	54%	50%	52%	College/voc.	30%	26%	28%
Age:				University	28%	31%	19%
18-29	8%	8%	20%	Post-Grad	21%	20%	12%
30-49	33%	38%	38%	HH Income:			
50+	56%	51%	42%	<\$40,000	20%	21%	28%
Marital:				\$40-\$60K	16%	15%	15%
Single	19%	22%	21%	\$60-\$80K	13%	13%	16%
Married/tog	62%	56%	59%	\$80K+	31%	33%	19%
Widowed	8%	9%	7%	Refused	19%	18%	11%
Sep.Div.	9%	11%	9%	Born in:			
Children:				Ontario	60%	62%	N/A
None	66%	67%	64%	Oth. Prov.	12%	10%	N/A
One	15%	12%	12%	Outside Cda	30%	26%	N/A
Two	12%	15%	13%				
Three +	5%	5%	8%				

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). As in prior waves, 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

# Summary Findings

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



### Findings:

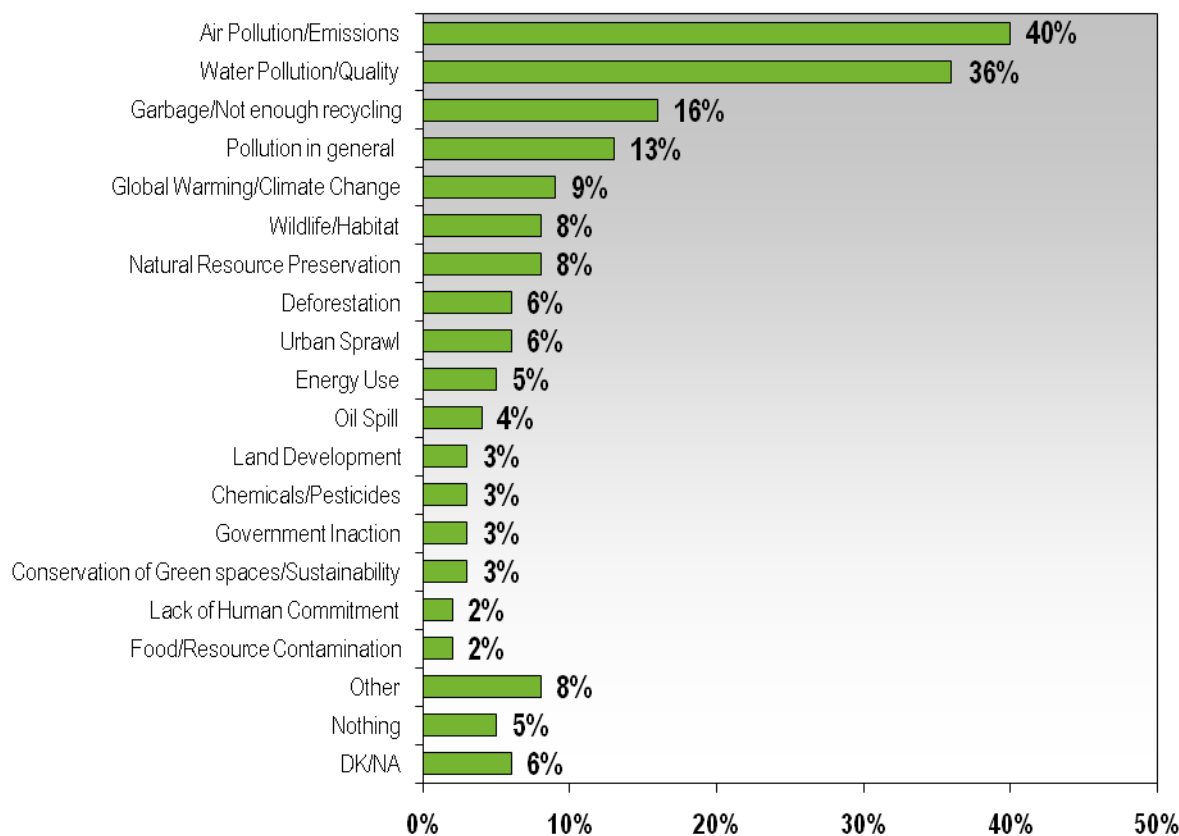
- The proportion who are concerned about the environment remains very high.
- The proportion who are very concerned has declined from 47 percent to 38 percent since 2007. However, the proportion who are somewhat concerned has grown from 45 percent to 49 percent.

### Key Differences:

- More likely to be very concerned:
  - Women (44%)
  - Those familiar with the objectives of the Greenbelt (46%)
  - Those supporting the Greenbelt (55%)
- Less likely to be very concerned:
  - Men (31%)
  - 18-29 (31%, up from 22% in 2009)

## What, if anything, about the environment are you most concerned about?

– All Respondents, unaided, multiple responses



### Findings:

- The two most mentioned concerns are Air Pollution (40%) and Water Pollution (36%). In third place, with half as much concern as water pollution is garbage/not enough recycling (16%).

### Key Differences:

- Women are more likely to be concerned about a lack of recycling (19%), as are those living in urban areas (17%).
- Land development is more likely to be mentioned by those living in rural areas (11%), as is lack of human commitment (10%).

Please indicate whether you completely agree, somewhat agree, somewhat disagree or completely disagree with the following statement?

***"Policies toward environmental protection and improvement must be upheld despite the economic recession"***

■ Completely agree    ■ Somewhat agree    ■ Somewhat disagree  
■ Completely disagree    ■ Refused    ■ DK/NA



**88% Agree**  
that environmental  
policies should be  
upheld despite the  
recession

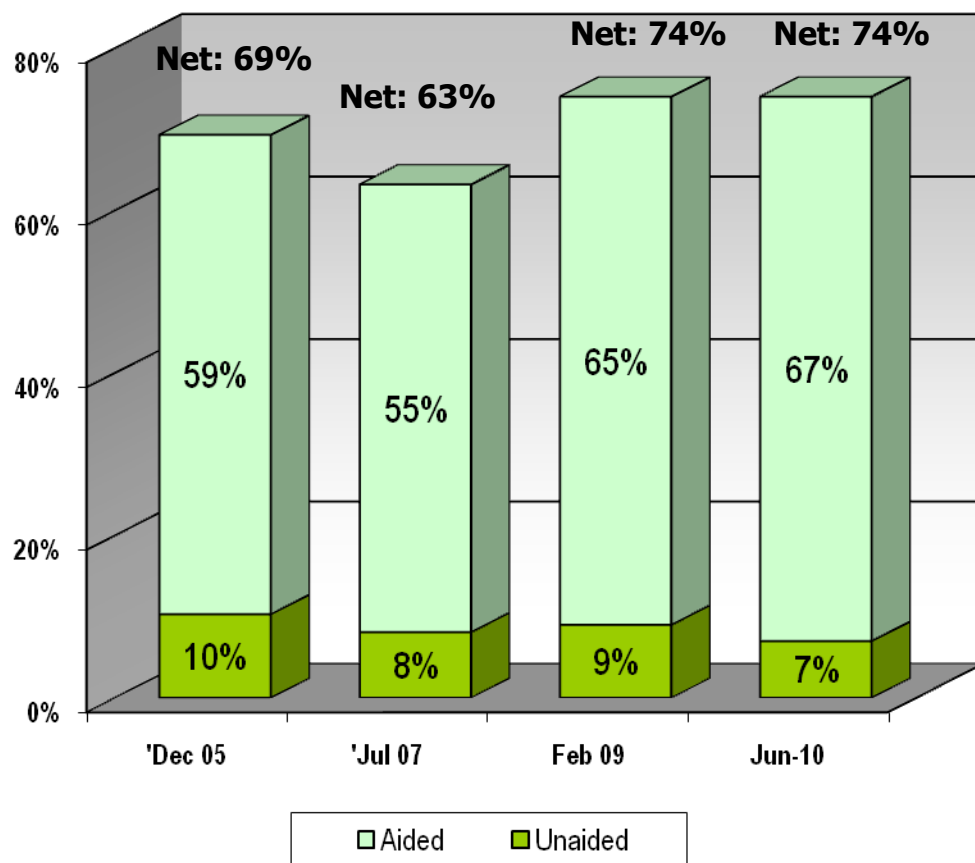
#### Findings:

- A large majority (88%) agree that policies toward environmental protection should be upheld despite economic hardship.
- Only 3% completely disagree with this statement.

#### Key Differences:

- Those more likely to agree:
  - Women (93%)
  - 18-29 year olds (97%)
  - Singles (92%)
  - <\$40K (94%)
  - Those born in Canada (91%)

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



### Findings:

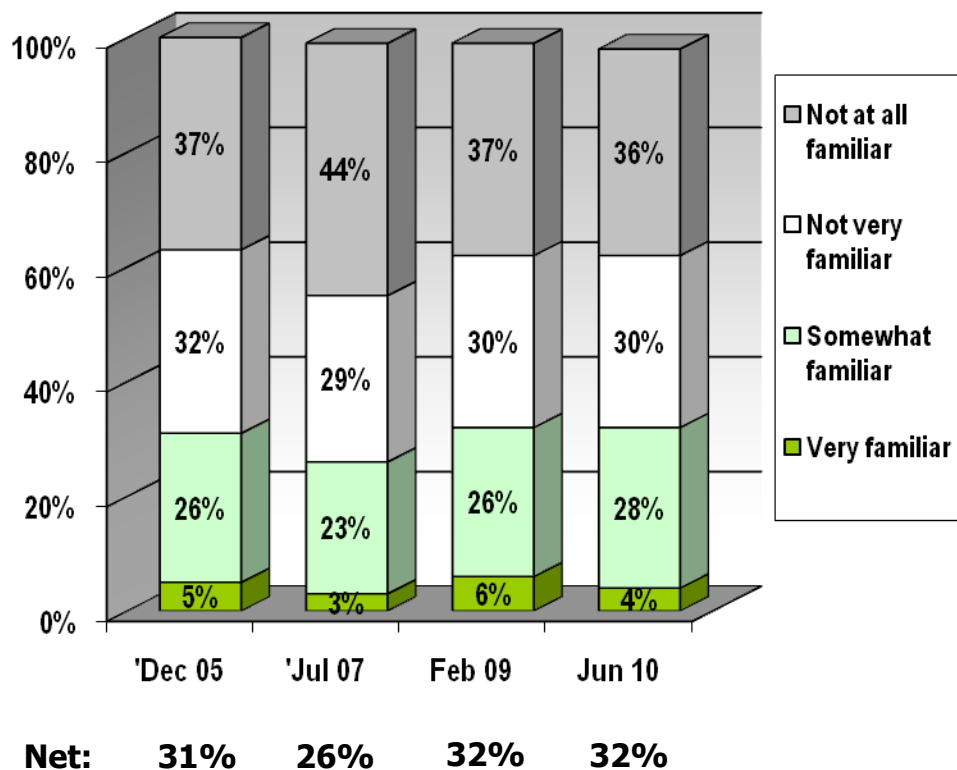
- Aided awareness of the Greenbelt has grown to 67% up from 65% in 2009. A stable 74 percent are aware of the Greenbelt.

### Key Differences:

- Those more likely to be aware of the Greenbelt include:
  - Those 50+ (78%), widows (81%)
  - Post-Grads (76%)
  - \$60K-\$80K (78%), \$80K+ (77%)
  - Born in Ontario (76%)
  - Those very concerned about the environment (79%)
  - Those in rural areas (81%), and
  - Those who had seen news (97%)
- Those less likely to be aware of the Greenbelt include:
  - Those 18-29 (48%)
  - Those with high school education or less (35%)

# Attitudes Towards The Greenbelt

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



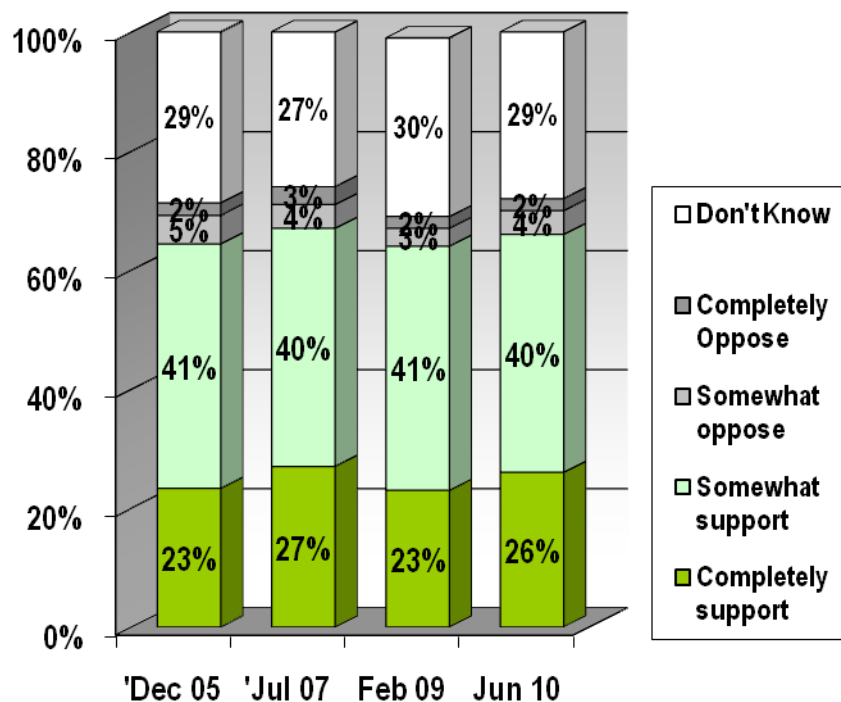
### Findings:

- One-third (32%) are very (4%) or somewhat (28%) familiar with the issues and objectives of the Greenbelt, in line with findings from 2005 and 2009.
- A similar proportion say they are either not very (30%) or not at all (36%) familiar.

### Key Differences:

- Those more likely to say they are familiar with the issues and objectives of the Greenbelt include:
  - Men more than women (38% vs. 27%)
  - Those married or widowed over those who are single (34%, 42% vs. 23%)
  - Post-grads (41%)
  - Those born in Canada (35%)
  - Those living in Rural areas (47%)
  - Those very concerned about the environment (39%)
  - Those with unaided awareness (84%, up from 71%)

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



### Findings:

- Overall, 66 percent say they completely (26%) or somewhat (40%) support the Greenbelt, up to nearly the highs of 2007.
- Opposition to the Greenbelt, while still quite small, has increased slightly from 5% in 2009, to 6% in 2010.
- Just under three-in-ten (29%) are unable to answer.

### Key Differences:

- Initial support is higher among those without children (68%), those born in Canada (69%), those with unaided awareness (90%), and those very (69%) or somewhat (67%) concerned with the environment.
- Men are more likely to oppose the Greenbelt (10%) while women are more likely to answer they don't know (33%)
- Those with incomes between \$40K-60K and those with incomes \$80K+ are more likely to oppose the Greenbelt (8%)

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

### Completely Support (26%)

- Men (29%), 50+ (28%)
- Married/Common-Law (29%)
- Post-Grads (34%) ↑
- Household income of \$60-\$80,000 (28%), \$80K+ (29%)
- 2009 Born outside of Canada (28%), 2010 Born in Canada (27%), Born in other province (32%)
- York/Durham/Simcoe (28%)
- Rural respondents (29%)
- Very concerned about environment (38%) ↑
- Unaided (65%)↑↑ or aided (28%)↓ awareness of the Greenbelt
- Very/somewhat familiar with objectives of the Greenbelt (48%) ↑
- Saw news stories, information or communication (43%)

### Somewhat Support (40%)

- Women (41%)
- Singles (43%), Widows (49%), Those without children at home (42%)
- Household income of <\$40K (43%) \$60-\$80,000 (43%)
- Born in Ontario (43%)
- Niagara/Hamilton, Brantford (43%)
- Somewhat concerned about environment (47%)
- Aided (49%) awareness of the Greenbelt
- Saw news stories, information or communications (45%)

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

#### **Opposed (6%)**

- Men (10%)
- Household incomes \$40K-\$60K (8%), \$80K+ (8%)
- York/Durham/Simcoe (8%)
- Not very/at all concerned about the environment (20%)
- Very/somewhat familiar with objectives of the Greenbelt (7%)

#### **Don't know (29%)**

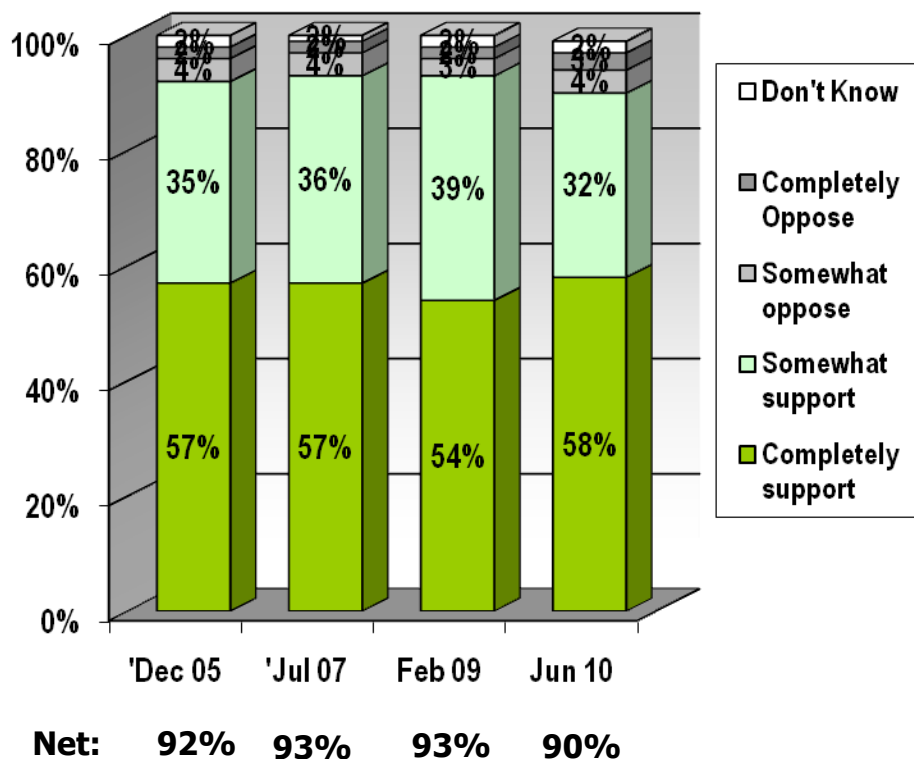
- Women (33%), 18-29 year (40%), single (34%)
- With Children at home (34%)
- High school education or less (33%)
- Born outside of Ontario (37%)
- Toronto (36%), rural residents (37%)
- Not very/at all familiar with objectives of the Greenbelt (40%)

The following pre-amble was read to respondents prior to the next question:

**READ:** The Greenbelt was created to permanently protect about 1.8 million acres of environmentally sensitive and agricultural land surrounding Toronto. Covering an areas larger than Prince Edward Island, the Greenbelt stretches from Niagara Falls around the Golden Horseshoe as far north as Tobermory and southern Lake Simcoe, and extends almost to Peterborough in the east. It includes the Niagara Escarpment, the Oak Ridges Moraine and the Rouge River.

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.

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



### Findings:

- After the preamble, support jumps significantly, with 90 percent now completely supporting (58%) or somewhat supporting (32%) the Greenbelt. Those completely supporting the Greenbelt after the preamble has risen from 54% in 2009 to 58% in 2010.
- Only 3 percent remain completely opposed however, total opposition has risen from 5% in 2009 to 7% in 2010.

### Key Differences:

- As in 2009, support increases across all groups, but is especially higher amongst those 18-29 (64% completely support). They previously had difficulty answering or somewhat supported it.
- 71% of those with unaided awareness and 58 percent of those with aided awareness now completely support it.
- Those in urban areas are more likely to completely support the Greenbelt (59% vs. 50%), maintaining the 9% point difference in support from 2009. Those in rural areas more likely to somewhat support it (37% vs. 32%).

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

### **Completely Support (54%)**

- Those aged 18-29 (64%)
- University (61%) and Post-Grads (65%)
- Household income of \$60-\$80,000 (64%)
- Very concerned about environment (68%)
- Unaided (71%) or aided (58%) awareness of the Greenbelt
- Very/somewhat familiar with objectives of the Greenbelt (62%)
- Saw news stories, information or communication (64%)

### **Somewhat Support (32%)**

- 18-29 (36%)
- Those with children (42%)
- Those with High school or less education (39%)
- Those in Rural areas (37%)
- Somewhat concerned about environment (37%), Not at all/not very concerned (41%)
- Aided (32%) awareness of the Greenbelt
- Not very/at all familiar with the objectives of the Greenbelt (35%)
- Those who initially somewhat supported the Greenbelt (46%)

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

**Opposed (6%)**

- Men (10%), 50+ (8%)
- Married/Common Law (8%)
- College/Vocational School (9%)
- Household Income \$80,000+ (9%)
- Dufferin/Peel/Halton (8%),  
York/Durham/Simcoe (8%)
- Rural areas (9%)
- Not very/at all concerned about the  
environment (16%)
- Very/somewhat familiar with objectives of the  
Greenbelt (9%)

**Don't know (4%)**

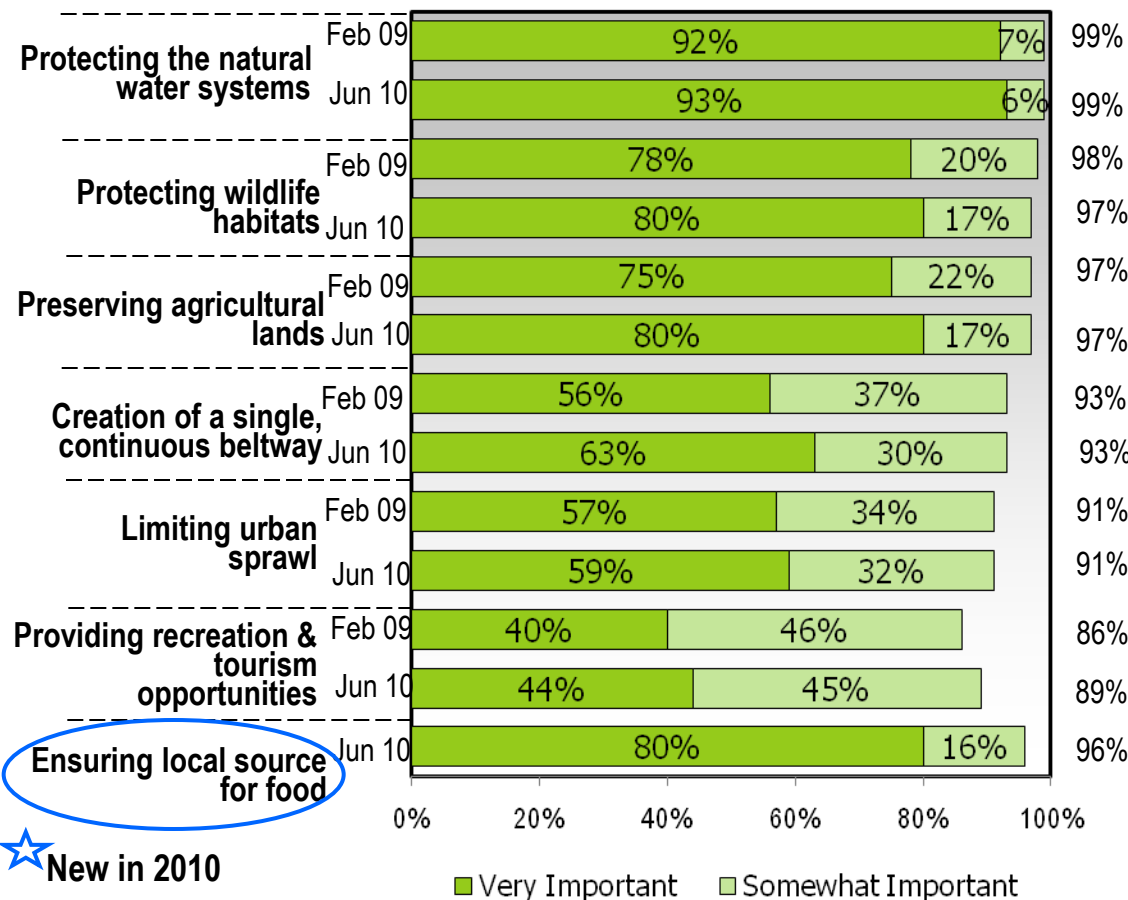
- Women (5%), 50+ (5%), Widow (10%)
- High school or less education (8%)
- Not very/at all concerned about  
environment (8%)

Based on this description, do you completely support, somewhat support, somewhat oppose or completely oppose the Greenbelt initiative? (Cont'd)

	Total	Completely support	Somewhat support	Somewhat oppose	Completely oppose	Don't know
%	100	26	40	4	2	28
Completely support	58	86	50	18	19	51
Somewhat support	32	9	46	43	13	34
Somewhat oppose	4	2	2	32	0	4
Completely oppose	3	2	1	0	63	1
Don't know	4	1	1	7	0	9
	<b>Increased support</b>		<b>+50%</b>	<b>+61%</b>	<b>+32%</b>	<b>+85%</b>

- A continued strong majority, 85 percent, of those who were initially unable to answer before the preamble changed their answers to support afterwards.
- The vast majority of those who initially said they completely support the Greenbelt continue to do so after the preamble (86%).
- Half (50%) of those who initially somewhat supported the Greenbelt switched to complete support after hearing the preamble.
- More than half (61%) of those who somewhat opposed the Greenbelt change their opinions to support the Greenbelt.
- Among those initially completely opposed, 32 percent, down from 58 percent, switched to support after hearing the preamble. There is potentially a firmer opposition than in 2009.

Please indicate whether each of the following goals or benefits of the Greenbelt is important to you?



★ New in 2010

### Findings:

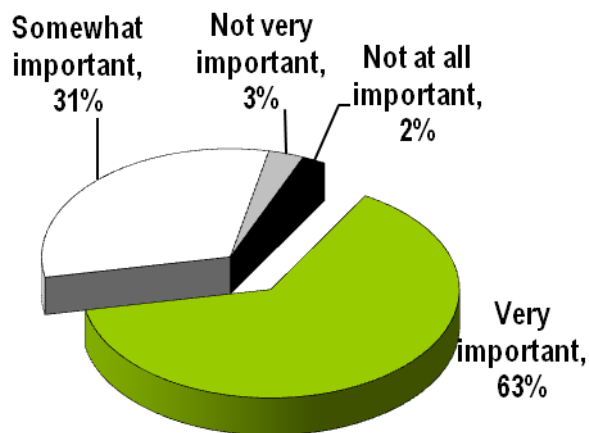
- As in prior waves, significant support exists for each of the stated goals and benefits. Protecting the natural water systems, protecting wildlife habitats, and preserving agricultural lands have the strongest support.
- The proportion feeling these goals are very important has increased across the board since 2009.
- The proportion feeling the creation of a single, continuous beltway is very important increased since 2009 (63% vs. 56%).

### Key Differences:

- Women, older respondents, those in rural areas, and those familiar with the Greenbelt are generally more likely to say each of these is very important.
- Women (87%) and those aged 18-29 (92%) are more likely to value having a local source for food.

## 2007 Data

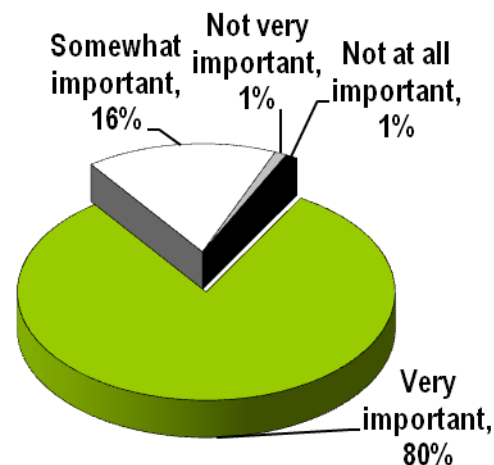
Q30. How important do you think the Greenbelt is for ensuring that we have a local source of food. Is it...?



## 2010 Data

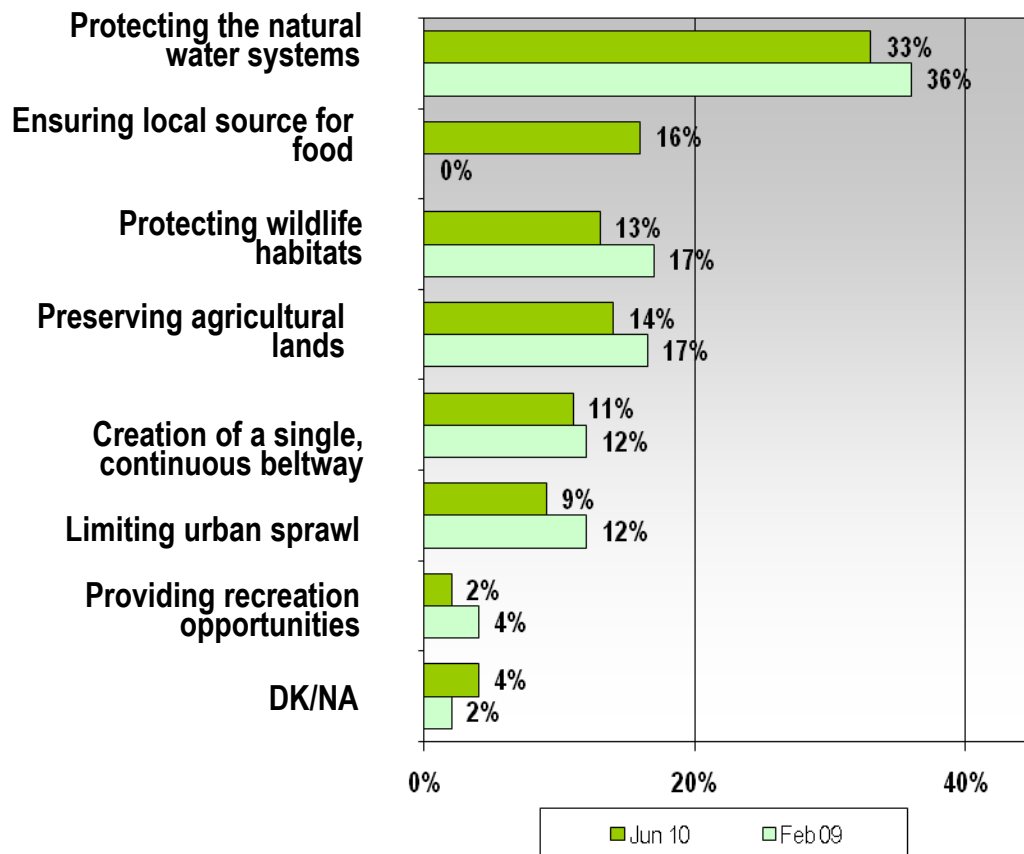
Q18. Please indicate whether each of the following goals or benefits of the Greenbelt is ... to you?

*g) Ensuring we have a local source for food*



***Note: Data are not directly comparable but are indicative of a widely held belief that a local food source is important.***

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



### Findings:

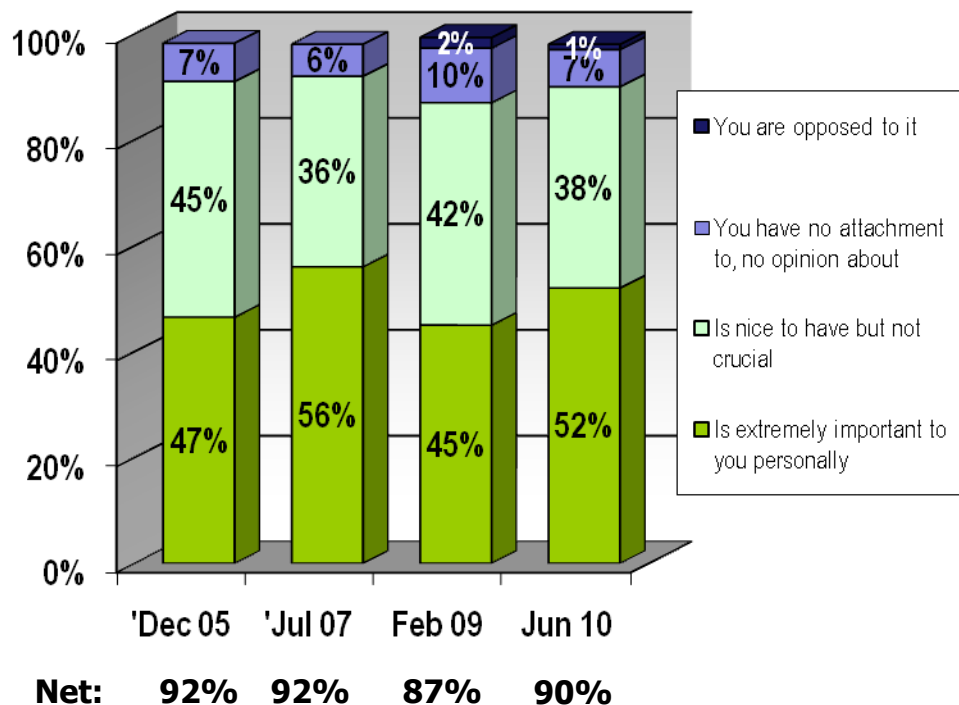
- Protecting the natural water systems is cited most frequently as the most important benefit of the Greenbelt, cited by 33 percent. Ensuring a local source for food (16%), protecting wildlife habitats (16%) and preserving agricultural lands (17%) are mentioned next.

### Key Differences:

- Post Grads (39%) and those earning \$80k+ (38%), and those in York/Durham/Simcoe region (39%) or rural areas (41%) immigrants (40%), and those in rural areas (41%) are more likely to cite 'protecting the natural water system.'
- Women more than men cite 'ensuring we have a local source for food' (19% vs. 11%)
- Those 50+ are more likely to cite preserving agricultural lands (17%)
- Those from Hamilton/Niagara/Brant are more likely to cite 'protecting wildlife habitats' (19%).

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/  
2009+: is nice to have and know is there
- iii) you really have no attachment to and no opinion about, or
- iv) you are opposed to it



### Findings:

- This year, over half of respondents (52%) agree that the Greenbelt is extremely important to them personally, with a further 38 percent saying it is nice to have and know is there. Only 7 percent say they have no attachment to it, while 1 percent maintain they are opposed to it.

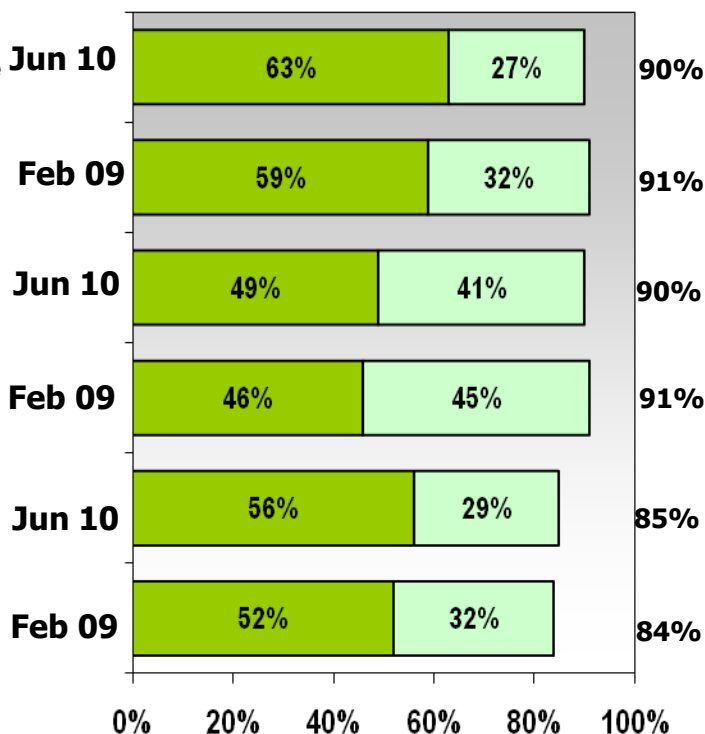
### Key Differences:

- Those more likely to say it is extremely important to them personally include Post Grads (59%), those in rural areas (63%), those familiar with the goals and objectives of the Greenbelt (62%), and those who are very concerned about the state of the environment (71%).

**Note:** in 2009 the third response was changed from "You really have no attachment to and don't really care much about the Greenbelt", and the fourth response "You are opposed to it" was added.

Please indicate whether you completely agree, somewhat agree, somewhat disagree or completely disagree with each of the following...

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



The Greenbelt is one of the most important contributions of our generation to the future of Ontario

The lands covered by the Greenbelt should be protected from the expansion or construction of new highways

### Findings:

- A majority or near majority completely agrees with each of the statements. While complete support has grown for all statements since 2009.

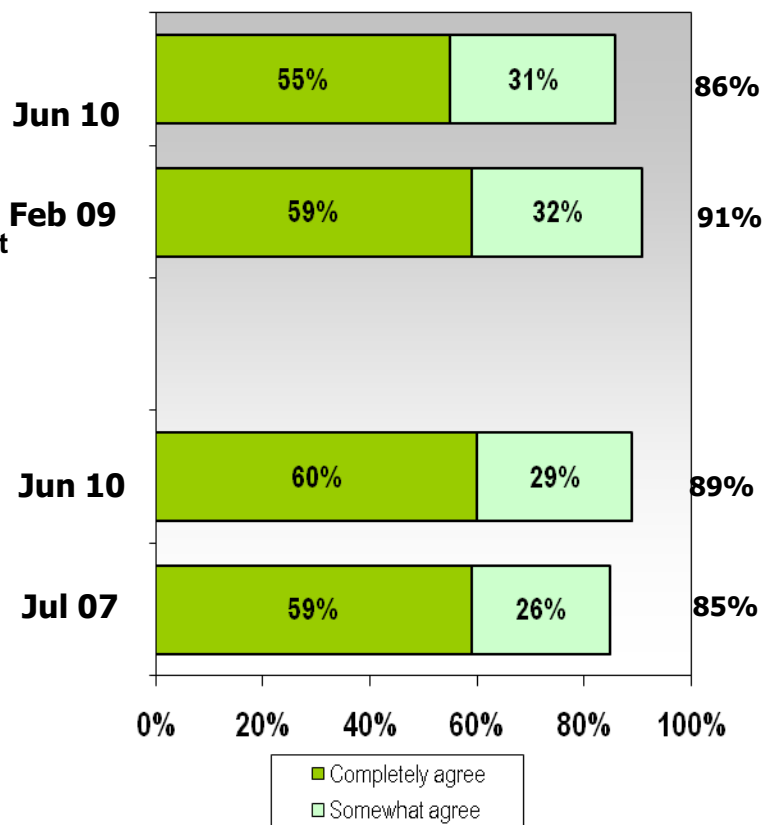
### Key Differences:

- Post Grads (72%), those born in Canada (67%), and those very concerned about the environment (73%) are more likely to agree that urban growth can be accommodated by using existing lands more efficiently.
- Those 50+ (55%) and those with incomes below \$40k (60%), and those very concerned about the environment (67%) are more likely to agree that the Greenbelt is one of the most important contributions of our generation to the future of Ontario.
- Those 18-29 (67%), those making \$60K-\$80K (63%) and those very concerned about the environment (70%) are more likely to agree that lands covered by the Greenbelt should be protected from the expansion of roadways.

Please indicate whether you completely agree, somewhat agree, somewhat disagree or completely disagree with each of the following...

The Greenbelt should be expanded, bringing more farmland and natural heritage lands under protection from further growth and development

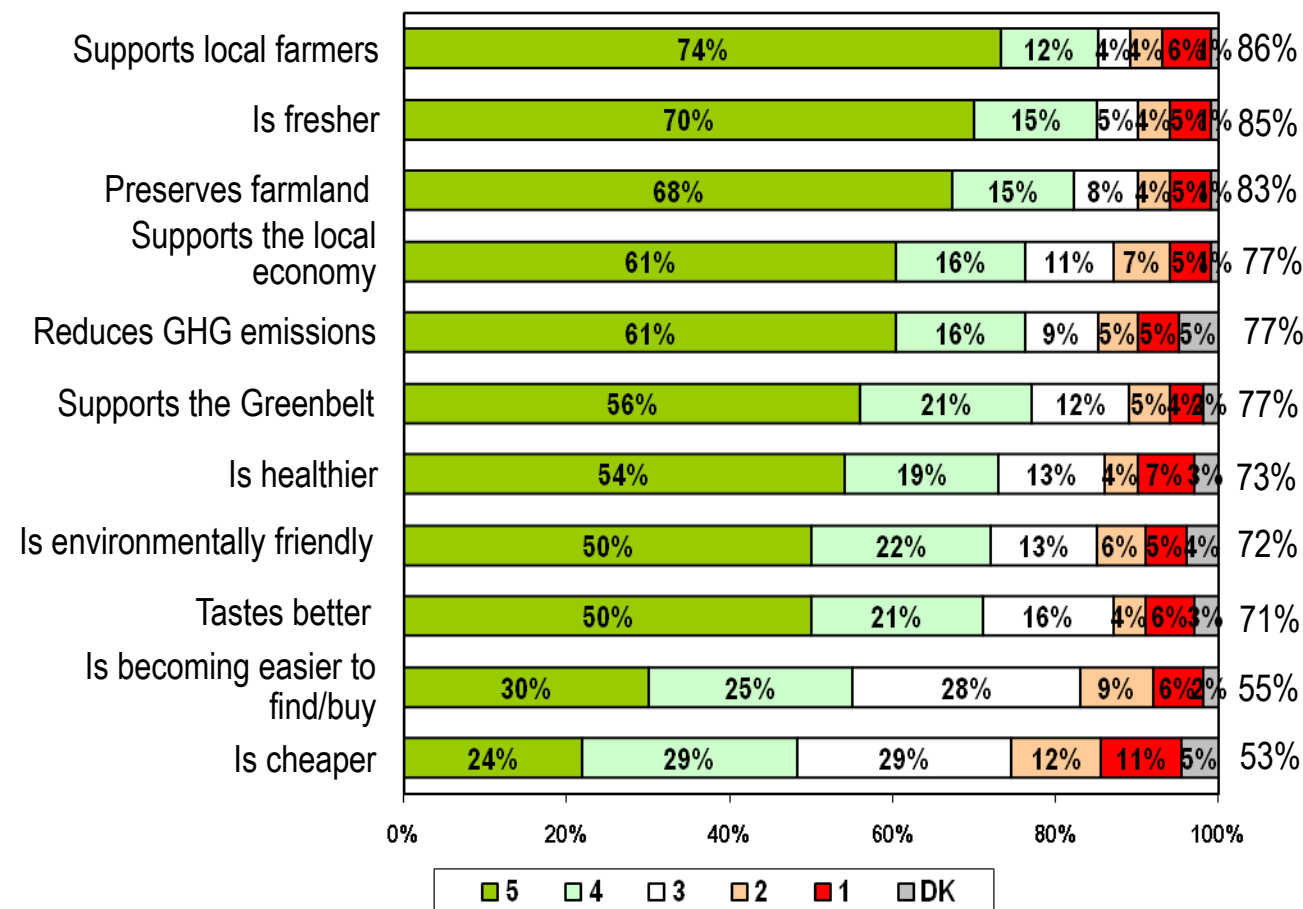
Governments should provide incentives for schools, hospitals and other public institutions to purchase and serve locally grown food.



### Key Differences:

- Women (60%), those with household incomes <\$40k (68%) and those very concerned about the environment (68%) are more likely to completely agree that the Greenbelt should be
- Women (65%), 18-29 year olds (71%), those with High school education or less (67%), those from Hamilton/Niagara/Brant (68%) and those very concerned about the environment (73%) are more likely to agree that governments should provide more incentives for public institutions to purchase and serve locally grown food.

Using a scale from 1 to 5 where 1 means you completely disagree and 5 means you completely agree, please indicate how strongly you agree with each of the following that locally-grown food....:



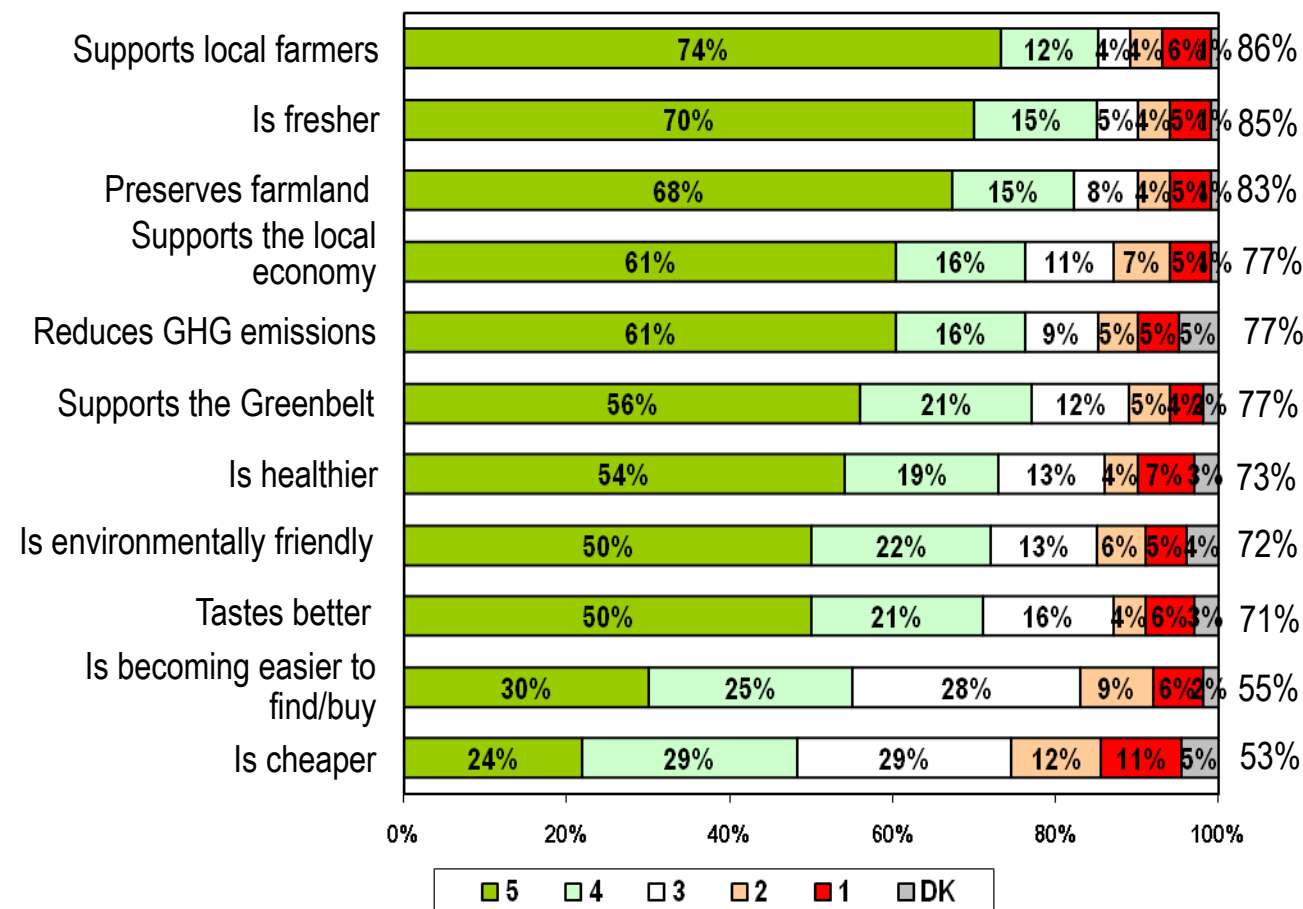
### Findings:

- The strongest support of locally grown food focuses more on providing economic support. Strong majorities agree with the benefits of locally grown food. Respondents most strongly agree that locally grown food supports local farmers (86%), and is fresher (85%) while there is a diverse range of opinion on whether locally grown food is cheaper, with 53% agreeing, 29% on the fence and 23% disagreeing.

### Key Differences:

- Those with University educations are more likely to disagree that locally grown food is cheaper (28%)
- Those from Toronto less likely to strongly agree that locally grown food supports the local economy (53%)

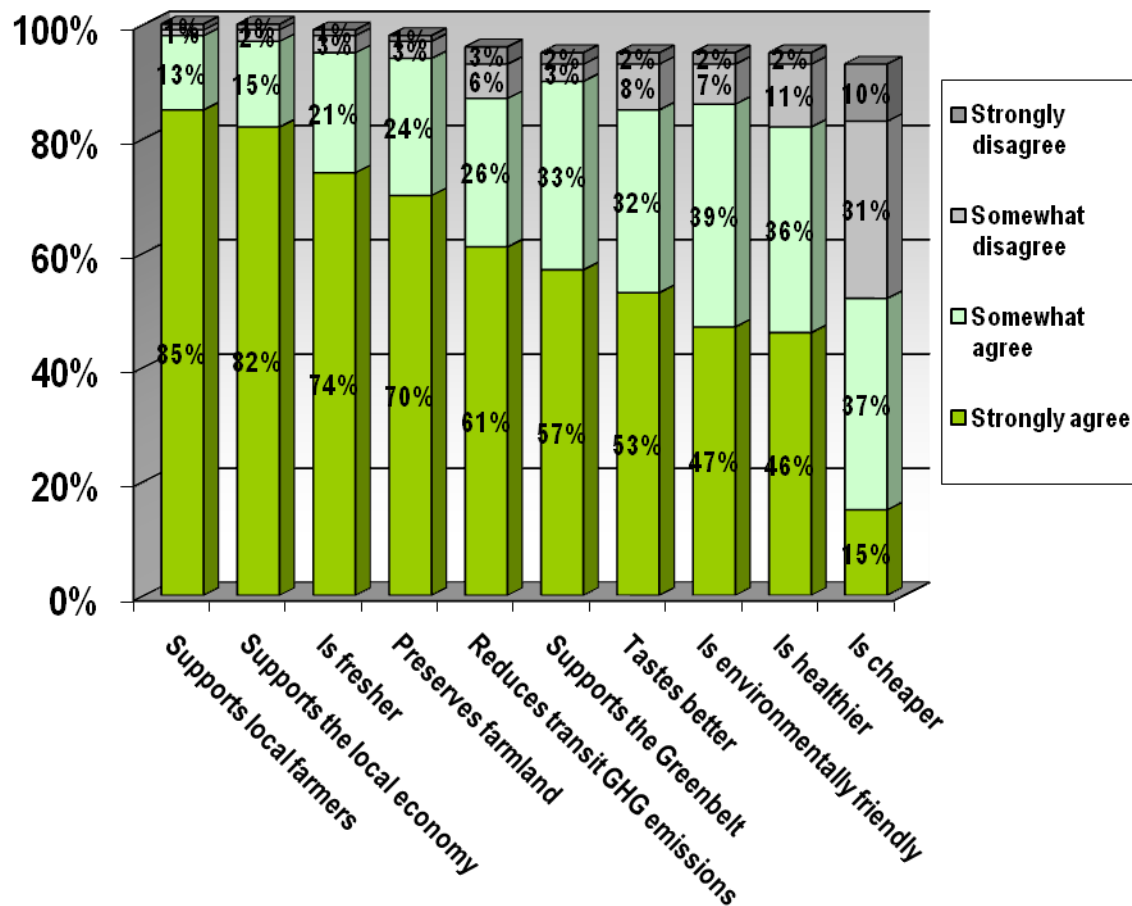
Using a scale from 1 to 5 where 1 means you completely disagree and 5 means you completely agree, please indicate how strongly you agree with each of the following that locally-grown food....:



### Key Differences CONT'D:

- Women (56%), 18-29's (67%), those in Hamilton/Niagara/Brant (55%) are more likely to say locally grown food is environmentally friendly
- Those from Toronto less likely to strongly agree that locally grown food supports the local economy (53%)
- Those who strongly agree that locally grown food supports the Greenbelt include:
  - Women (62%)
  - 50+ (60%)
  - University Grads (61%)
  - \$60K-80K HHI (64%)
  - Very concerned about environment (65%)
  - Complete support initially for GB (70%)

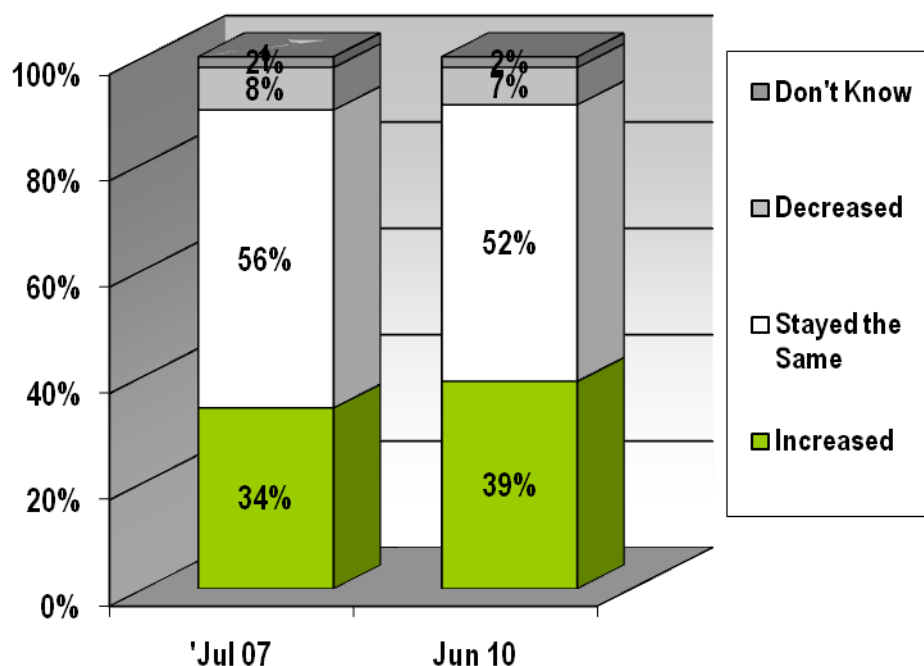
2007 DATA Please indicate how strongly you agree or disagree that locally grown food...?



### Key Differences:

- Women are more likely to strongly agree that locally grown food is fresher (77%) and tastes better (58%).
- Those who live in the Greenbelt are more likely to see that locally grown foods support the Greenbelt (65%).
- Those in rural areas are more likely to strongly agree that it preserves farmland (75%), is fresher (79%) and tastes better (63%).

Over the past 5 years has your consumption of ethnic or multicultural foods increased, stayed the same or decreased:



### Findings:

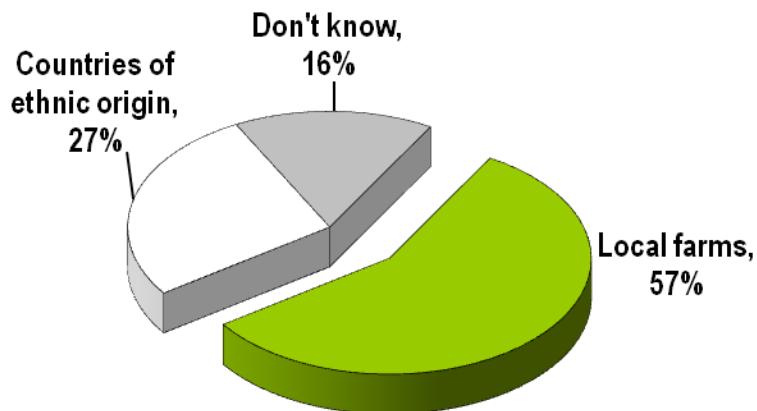
- Almost four-in-ten Ontarians say they have increased their consumption of multicultural foods in the past five years, up 5% from 2007, when it was 34%.
- Consumption of ethnic or multicultural foods has stayed the same in the past five years for just over half (52%) of respondents. It has increased for just under four-in-ten respondents (39%).

### Key Differences:

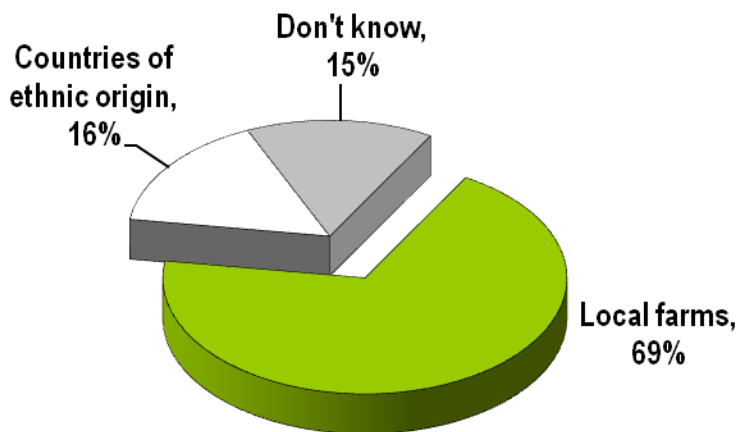
- Consumption was more likely to increase for:
  - Men (44%)
  - 18-29's (52%)
  - University (48%), Post Grads (45%)
  - Those who initially completely support the Greenbelt (49%), and those who subsequently support the Greenbelt (44%)

Thinking about any ethnic or multicultural foods you buy, do you prefer they come from local farms or the countries from which the ethnic group originates:

### 2007 Data



### 2010 Data



### **Findings:**

- Just over two-thirds (69%) prefer their ethnic food to come from local farms. Fifteen percent did not have a preference.

### **Key Differences:**

- Those 30-49 (73%), those with household incomes of <\$40K (75%), those from rural areas (76%), those concerned with the environment (77%) and those with initial complete support for the Greenbelt (75%) are more likely to say local farm
- Those 18-29 (37%), singles (22%), Immigrants (21%) and those not very or not at all concerned for the environment (23%) are more likely to prefer the country from which the ethnic group originates.

# Conclusions

- Results from the 2010 Greenbelt Foundation survey continue to show an encouraging level of support for the Greenbelt in Ontario.
- There has been a substantial rise in personal attachment to the Greenbelt since 2009.
- A very large majority of Ontarians are concerned about the state of the natural environment and despite the recession, strongly favour upholding policies toward environmental preservation and improvement.
- Total awareness of the Greenbelt has remained stable since 2009, and while significant proportions are not fully familiar with the goals and benefits of the Greenbelt, once these are explained to them, support jumps dramatically. In 2010, those who are initially opposed are more likely to stay opposed to the Greenbelt after the preamble, suggesting opposition has become more firmly rooted.
- Ontarians strongly agree that the Greenbelt should be protected from encroachment, that urban growth can be better accommodated by making more efficient use of existing lands, and that the Greenbelt represents a lasting legacy of this generation to the next.
- Protecting the natural waterways remains the most highly valued benefit of the Greenbelt, with preserving agricultural lands and protecting wildlife habitats also highly valued. Ensuring a local source for food, a new addition in 2010, is as highly valued as preserving agricultural lands and protecting wildlife, putting it among the top ranking.
- Certain groups are more likely to show a deeper level of engagement with the Greenbelt, including older residents, higher income/education residents, and those living in rural areas. However, younger residents and those in urban areas also express very high levels of support once they become made aware of the goals and benefits of the Greenbelt.

# Conclusions

- Agreement about the benefits of locally grown food while still high, is down slightly from 2007.
- A greater proportion of Ontarians report eating an increased amount of multicultural foods, and express a much stronger preference that ethnic foods come from local farms than in 2007.



Possibility grows here.



**ENVIRONICS**  
R E S E A R C H G R O U P

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