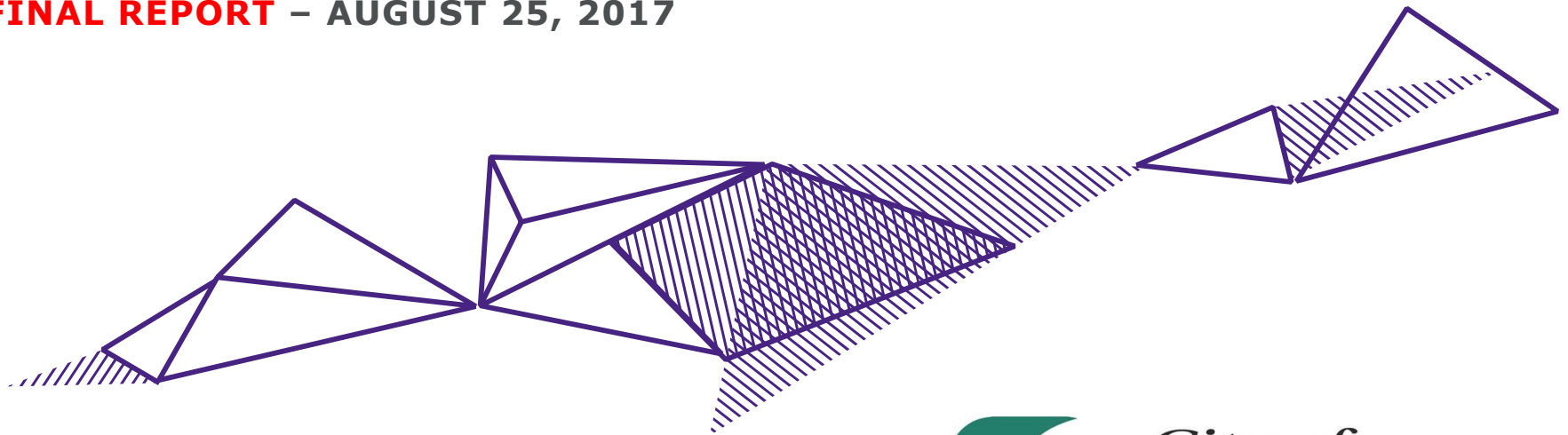


**ENVIRONICS**  
RESEARCH

# 2017 Environmental Survey - ICI Results

Prepared for the City of Saskatoon

**FINAL REPORT** – AUGUST 25, 2017



 *City of*  
**Saskatoon**

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# EXECUTIVE SUMMARY

## Environmental Attitudes and Behaviours

- ▶ Six in ten Saskatoon Institutional, Commercial and Industrial (ICI) representatives say *protecting the environment* is a major issue for their organization, with this sentiment more likely to be shared by larger organizations. *Meeting industry best practices* and *following government regulations* are the key issues for organizations, with *utility and property tax rates* less of a concern.
- ▶ When asked to identify the most important environmental issue facing the city, ICI representatives are most likely to be concerned about waste management issues, particularly the availability of recycling and the amount of waste that ends up in the landfill. Issues related to climate change, such as emissions and the impacts of extreme weather, are less prominent.
- ▶ Eight in ten organizations frequently dispose of hazardous waste properly and turn off lights and electronics when not in use. Participation in other environmentally-friendly activities is less frequent, with employers least likely to subsidize transit passes for employees.
  - ▶ For some of these activities, the key barriers to implementation on a more consistent basis appears to be practical considerations (e.g. not having space for compost, using very little water) as well as difficulty changing ingrained habits (e.g. forgetting to leave lights on, not directing employees to stop idling vehicles). The cost of making changes is a secondary consideration.
- ▶ When asked to identify which types of environmentally friendly improvements have made at their organizations, ICI representatives are most likely to mention that they installed energy-efficient lighting and programmable thermostats to reduce consumption during off-peak times.
  - ▶ The cost of installing better insulation/windows, water-saving equipment and solar panels is more likely to be a prominent barrier to ICI representatives. The fact that approximately one half of organizations do not have control over their buildings is also a significant factor that prevents ICI representatives from making these improvements.
- ▶ More than half of Saskatoon organizations always or often purchase environmentally-friendly products and services. Just three in ten indicate they have an environmental sustainability plan in place, with this more likely to be the case among larger companies with 50+ employees.

# EXECUTIVE SUMMARY CONTINUED

## **Perceptions of Saskatoon's Environmental Performance**

- ▶ Three in ten consider the City of Saskatoon to be doing an excellent or good job in helping organizations reduce their environmental impact, with this sentiment fairly consistent across different types of ICI organizations. When asked how interested they would be in having the City support ICIs' efforts to reduce their environmental impact, more than eight in ten indicate they would consider this, with public sector and more environmentally-conscientious organizations more likely to desire this support.

## **Views Regarding Climate Change**

- ▶ Three in ten organizations believe climate change will significantly impact their operations, with large organizations most likely to expect that climate change will negatively impact their organizations. ICI representatives' primary concerns related to the impact of climate change include higher costs for energy, insurance and public services.
- ▶ More than half of organizations believe they are at least somewhat prepared to deal with extreme storms and flooding, with the level of preparedness also relatively high for tornadoes and air/water quality issues. Public sector organizations are more likely than private businesses and not-for-profits to say that they are at least somewhat prepared for these impacts.

## **Corporate Environmental Perceptions**

- ▶ More than four in five organizations strongly agree that their clients expect them to act in an environmentally responsible manner, with most believing they do more than other organizations to protect the environment. Only three in ten agree that organizations elsewhere in Canada face fewer environmental regulations than firms based in Saskatchewan.

## **Information Sources**

- ▶ Organizations are most likely to obtain information about environmental issues online, or from a wide array of local, national and international media sources. Larger organizations are more likely than smaller ones to access information from their own internal sources, with professional and trade associations also playing a key role. About one in ten ICI representatives indicate that they rely on government sources for this information.

# INTRODUCTION & METHODOLOGY

- ▶ The City of Saskatoon required a better understanding of environmental attitudes and behaviours, perceived barriers to taking environmental actions, and perceptions of the City's environmental performance among representatives of Institutional, Commercial and Industrial (ICI) organizations.
- ▶ Environics conducted a telephone survey with representatives of ICI organizations operating in Saskatoon. This included businesses, not-for-profit organizations, and health and educational sector representatives. Contact information for these organizations was obtained from lists purchased by Environics.
- ▶ A total of n=151 respondents were interviewed by telephone between June 29<sup>th</sup> and July 19<sup>th</sup>, 2017. The following quotas were in place for the organization sector and size (based on the number of employees):

Organization Type	Number of interviews
Business	108
Not-for-profit organizations	31
Institutional (e.g. health care, education, etc.)	12
<b>TOTAL</b>	<b>151</b>
Number of Employees	Number of interviews
<10	76
10-49	51
50+	24
<b>TOTAL</b>	<b>151</b>

- ▶ The margin of error for a sample size of n=151 is +/- 7.98%, 19 times out of 20.

*Results in this report may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the charts due to rounding.*

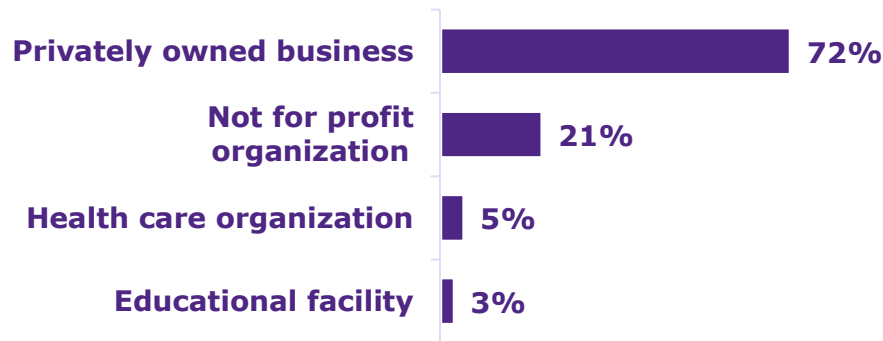


# Profile of Respondents

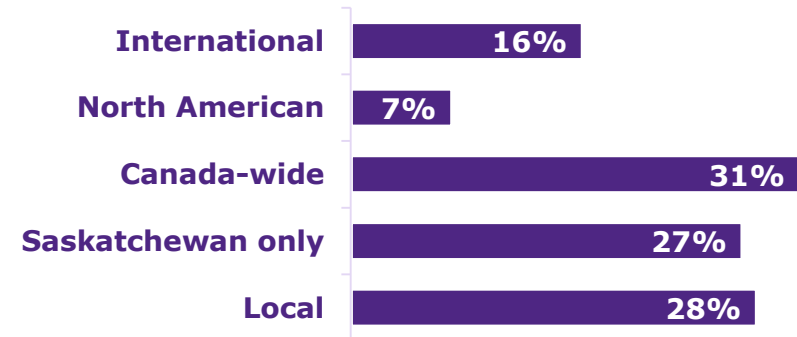
# DEMOGRAPHIC PROFILE



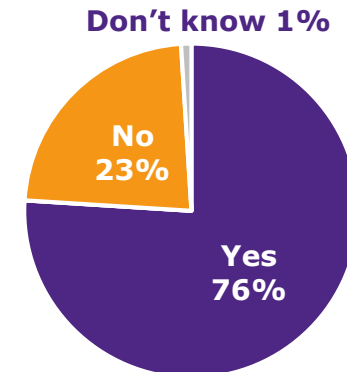
## Field of business



## Scope of organization



## Headquartered in Saskatoon

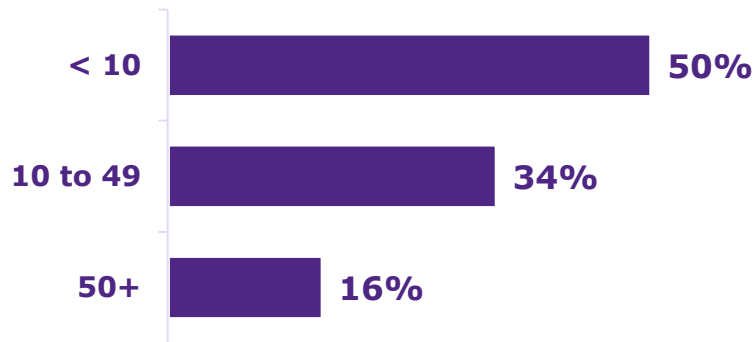


- QD7. Is your organization headquartered in Saskatoon?
- QD8. What is the scope of your organization? Is it...
- QD4. Is your organization a...

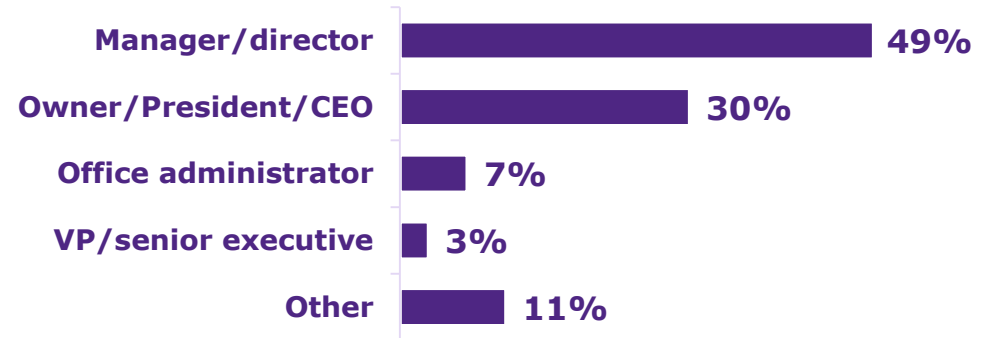
# DEMOGRAPHIC PROFILE



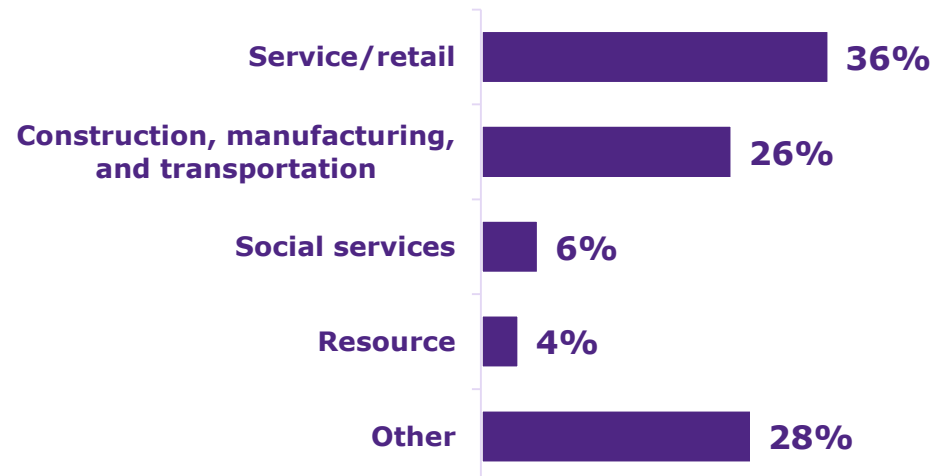
## Number of employees



## Role within organization



## Organization Sector



QD3. And what is your role within the organization?

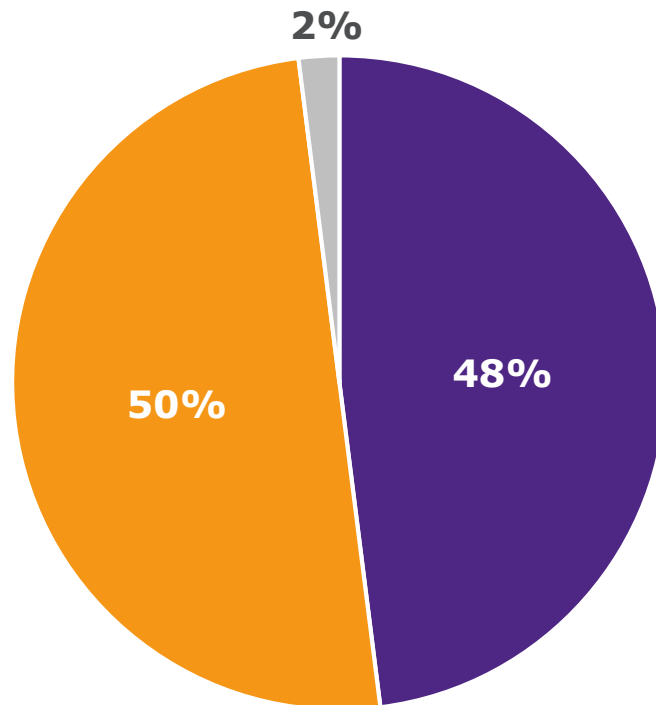
QD5. In which sector does your organization operate?

QD6. How many full and part-time employees, including yourself, are currently employed at your operations in Saskatoon?



# RESPONSIBILITY FOR PROPERTY MANAGEMENT

Almost half of the organizations contacted are not responsible for managing their own properties.



- Yes, responsible for property management
- No, not responsible for property management
- Don't know/Not applicable

Institutional organizations (75% vs. 45% among private businesses and not-for-profit organizations) and organizations with 50+ employees (71% vs. 42% among those with <10 employees) are more likely to be responsible for managing their own properties.

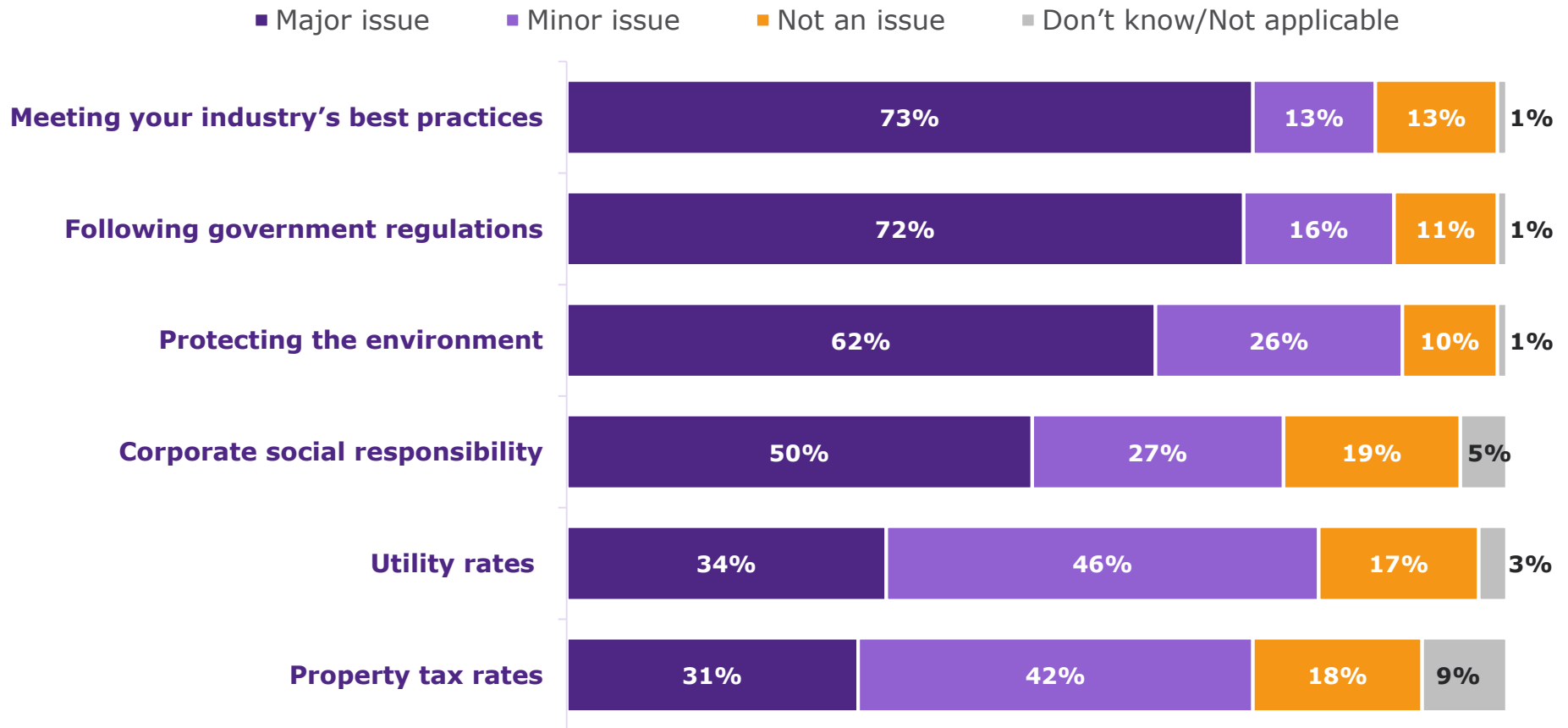
Q3. Is your organization responsible for the property management of your office, location or facility?



# **Environmental Attitudes and Behaviours**

# ISSUE SALIENCE FOR SASKATOON ORGANIZATIONS

Six in ten Saskatoon ICI representatives say protecting the environment is a major issue for their organization.

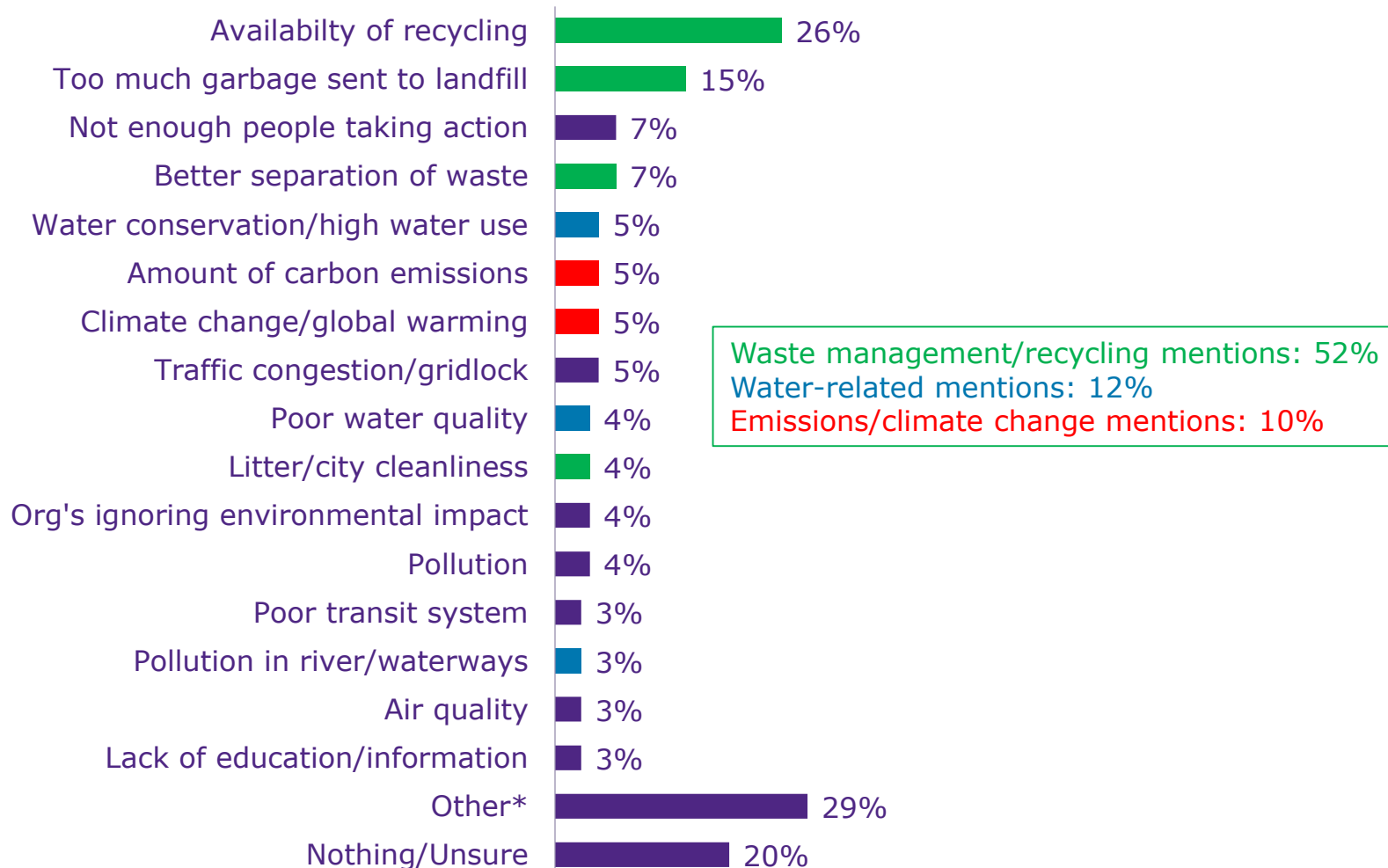


Larger organizations with 50+ employees are more likely than smaller organizations to say protecting the environment (79%) and corporate social responsibility (71%) are major issues.

Q1. How important are each of the following issues to businesses and organizations like yours? For each one, please indicate if this is a major issue, a minor issue or not an issue.

# MOST IMPORTANT ENVIRONMENTAL CHALLENGE

Organizations in Saskatoon are most likely to say waste and recycling services are the City's greatest environmental challenge.

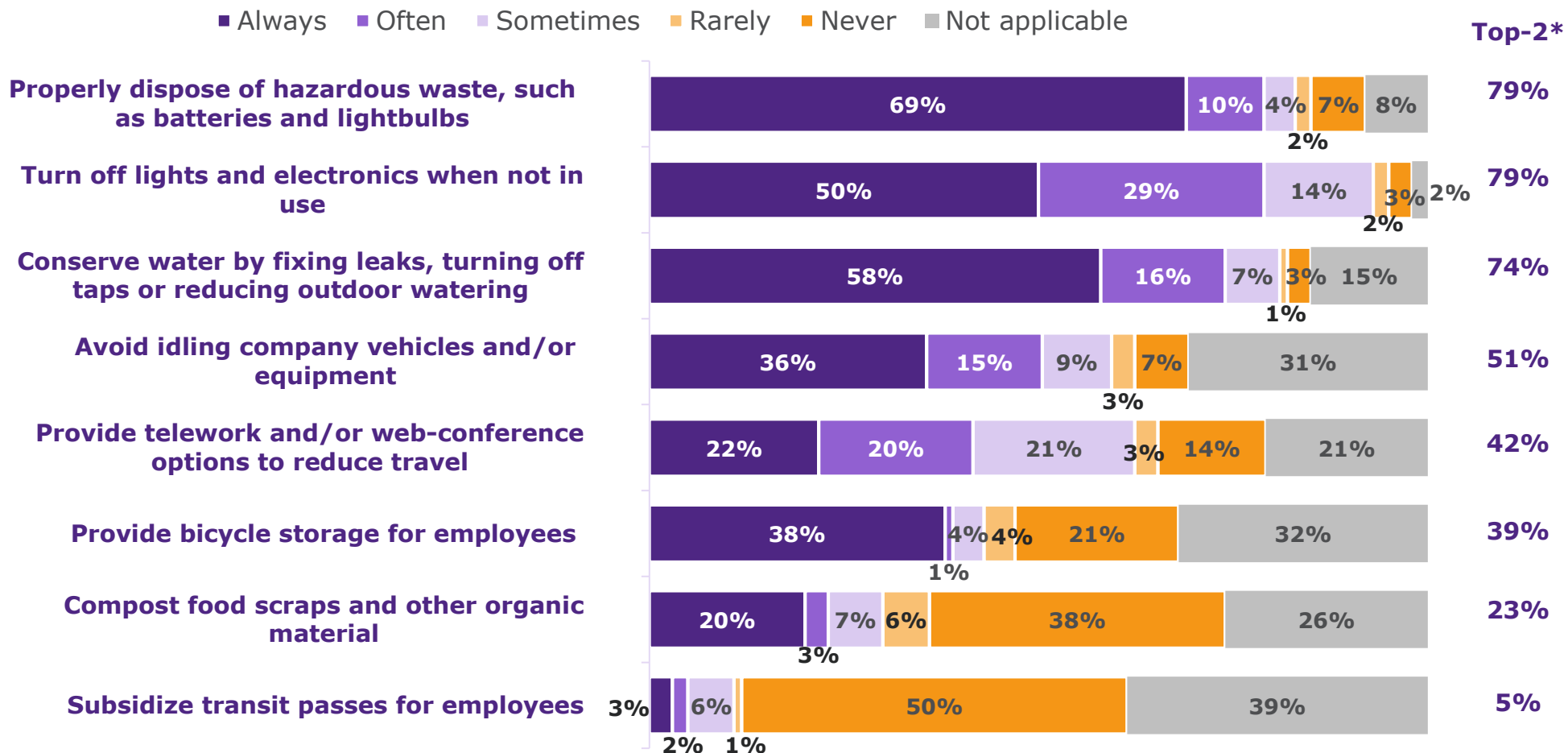


Q2. In your view, what are the most important environmental challenges facing Saskatoon today?

\*Mentioned by 2% or fewer respondents.

# FREQUENCY OF ENVIRONMENTAL BEHAVIOURS

Eight in ten organizations frequently dispose of hazardous waste properly and turn off lights and electronics when not in use.



Q4. Which of the following activities does your organization take part in on a regular basis? For each one, please indicate if your organization always, often, sometimes, rarely or never does this, or if it is not applicable to your organization.

\*Top-2 indicates those who always or often engage in this behaviour.



# BARRIERS TO COMPOSTING

**Lack of space and lack of waste produced are perceived as the two main barriers to composting at organizations.**

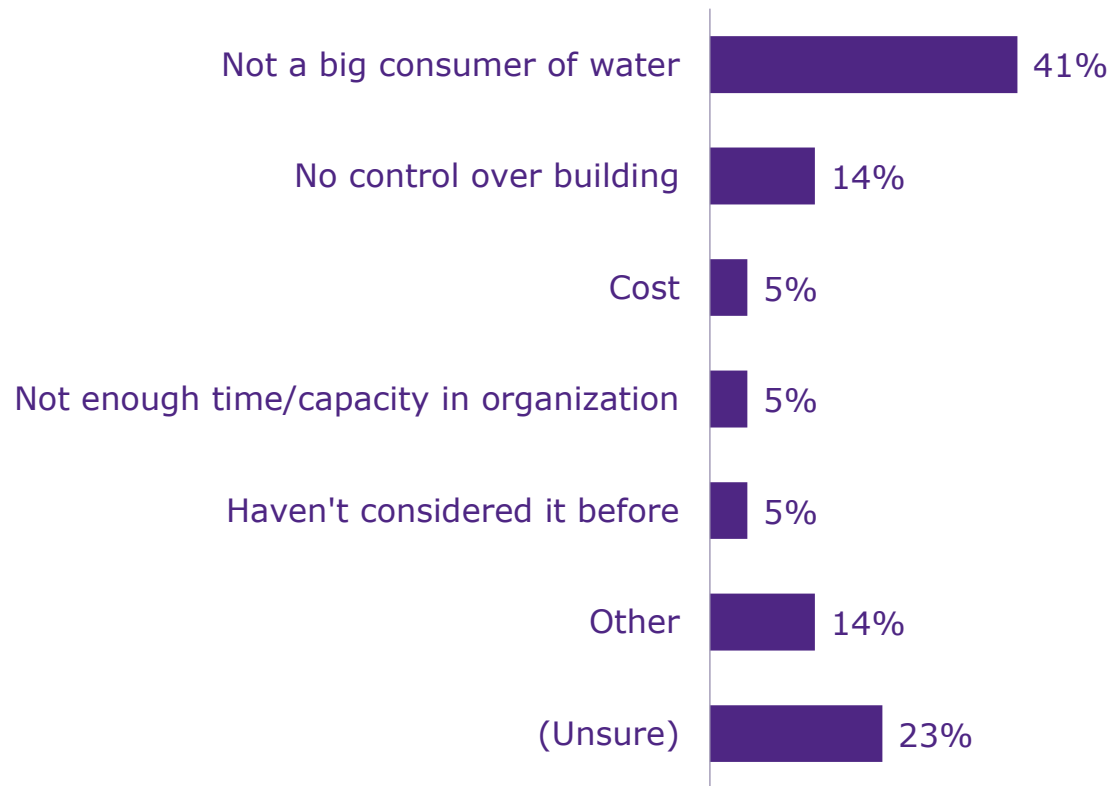


Q4A. What, if anything, prevents your organization from composting food scraps and other organic material more often?  
(Base: Those who rarely, sometimes or never compost, n=78)



# BARRIERS TO CONSERVING WATER

Organizations are most likely to indicate they do not use enough water to make conservation efforts worthwhile.

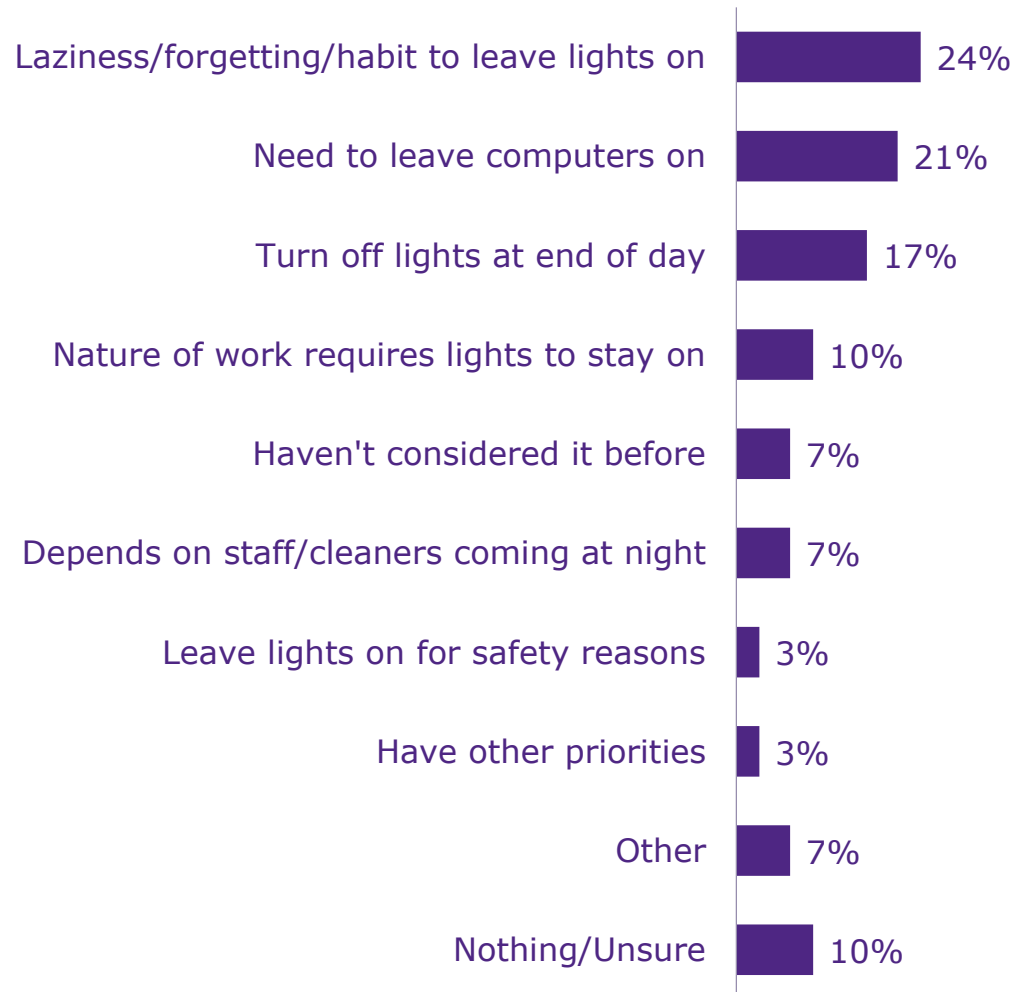


Q4A. What, if anything, prevents your organization from conserving water by fixing leaks, turning off taps or reducing outdoor watering more often? (Base: Those who rarely, sometimes or never conserve water, n=22)



# BARRIERS TO TURNING OFF LIGHTS/ELECTRONICS

**Forgetfulness, as well as the need to leave lights on for specific purposes, are the main reasons why lights/electronics stay on.**



Q4A. What, if anything, prevents your organization from turning off lights and electronics when not in use more often?  
(Base: Those who rarely, sometimes or never turn off lights/electronics, n=29)





# BARRIERS TO AVOID IDLING VEHICLES

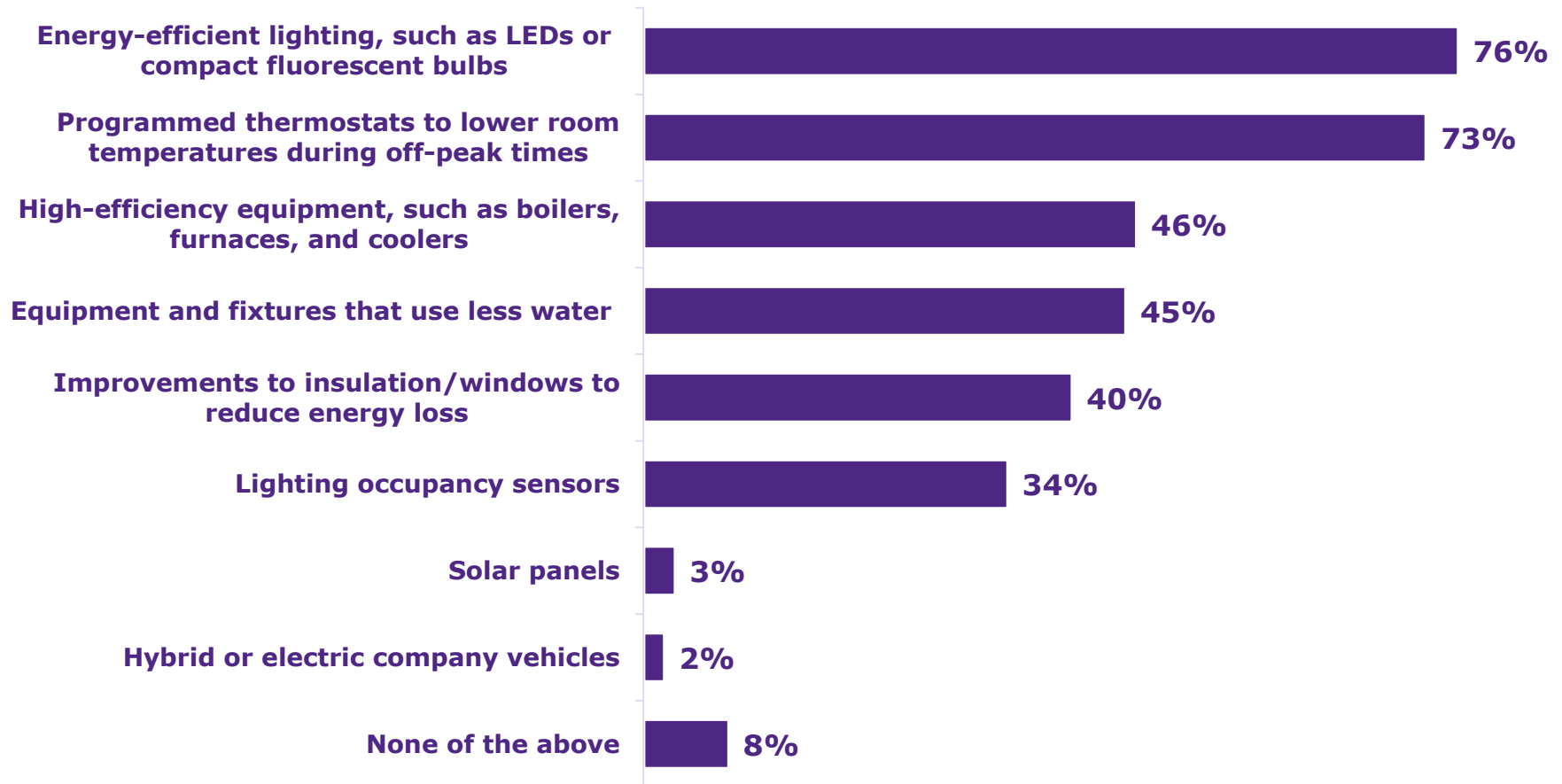
**Ingrained habits, as well as weather, are barriers that prevent organizations from curbing idling of vehicles.**



Q4A. What, if anything, prevents your organization from avoiding idling company vehicles more often? (Base: Those who rarely, sometimes or never avoid idling company vehicles, n=28)

# USE OF ENVIRONMENTALLY FRIENDLY TECHNOLOGY

Three quarters of organizations use energy-efficient lighting and programmable thermostats to reduce heat during off-peak times.



Q5. Which of the following items, if any, have you installed at your organization to reduce your organization's environmental impact?

# BARRIERS TO MAKING IMPROVEMENTS

Not having control over a facility and the cost of these improvements are the two main barriers to adaptation.



	Insulation/windows	Solar Panels	Water-saving equipment/fixtures
<b>Don't own/manage facility</b>	<b>43%</b>	<b>39%</b>	<b>25%</b>
<b>Cost/too expensive</b>	<b>28%</b>	<b>34%</b>	<b>15%</b>
Unnecessary/not required	12%	6%	
Lack of knowledge/haven't considered it	4%	7%	6%
Can't be bothered/not a priority	4%	1%	2%
Don't use much water	-	-	27%
Not available to us	-	5%	-

What, if anything, prevents your organization from...

Q4A. improving insulation or windows to reduce energy loss? (Base: Those who have not installed new insulation/windows, n=54)

Q4B. ... installing solar panels? (Base: Those who have not installed solar panels, n=122)

Q4C. ... installing equipment and fixtures that use less water? (Base: Those who have not installed water-saving equipment/fixtures, n=52)

# USE OF ENVIRONMENTALLY-FRIENDLY PRODUCTS AND SERVICES

More than half of Saskatoon organizations always or often purchase environmentally-friendly products and services.

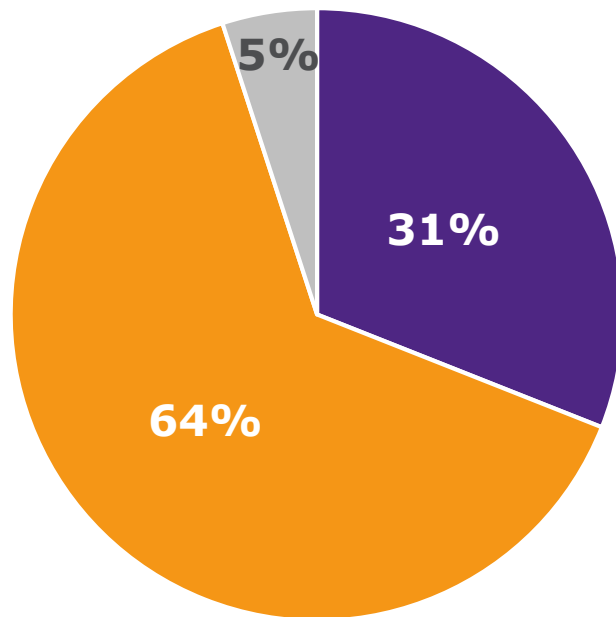


- Smaller firms are more likely to say they always purchase environmentally friendly products and services (24% among those with <10 employees vs. 4% among those with 50+ employees).
- Those with a sustainability plan in place are also more likely to always purchase environmentally-friendly products and services (30% vs. 11% among those without one).

Q6. To what extent is your organization purchasing environmentally-friendly products and services? Are you doing this ...

# ENVIRONMENTAL SUSTAINABILITY PLANS

Three in ten organizations currently have an environmental sustainability plan in place, with large organizations more likely to have done this planning.



- Yes, organization has an environmental sustainability plan
- No, organization does not have an environmental sustainability plan
- Don't know/No answer

## Incidence of a Sustainability Plan, By Organization Size

<10 employees	10-49 employees	50+ employees
26%	29%	50%

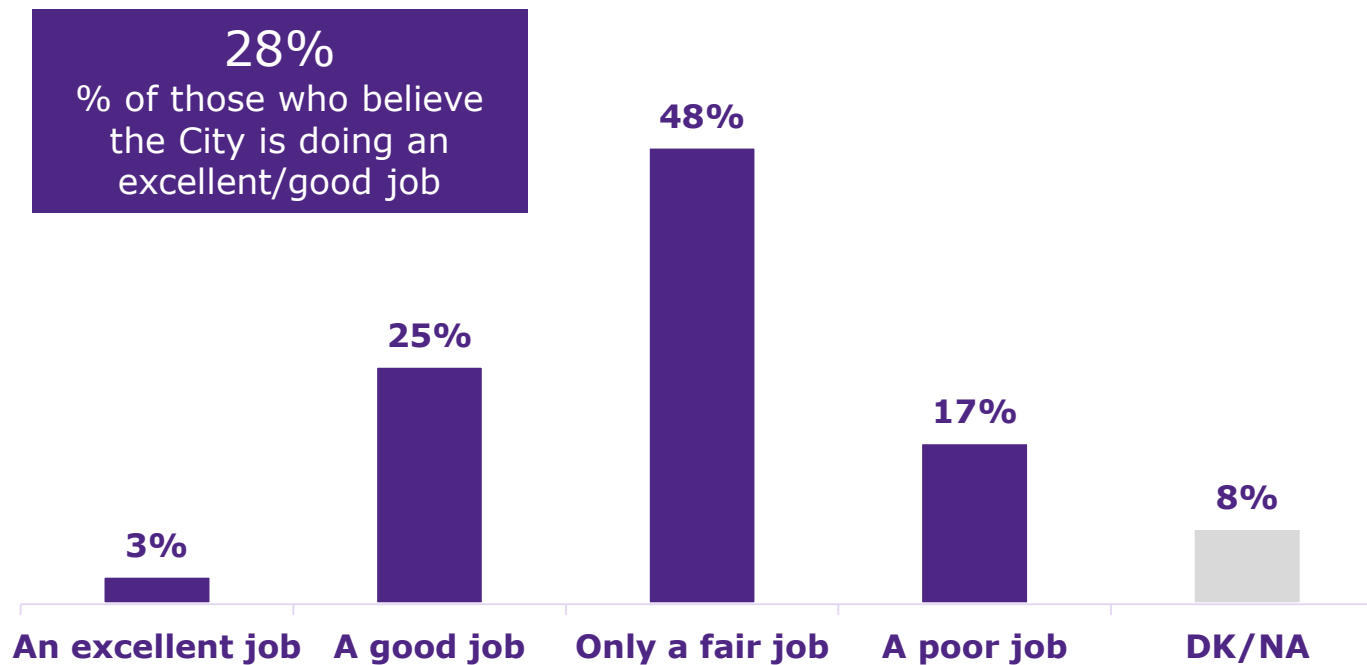
Q7. Does your organization have an environmental sustainability plan in place?



# Perceptions of Saskatoon's Environmental Performance

# PERCEPTIONS OF THE CITY'S ENVIRONMENTAL PERFORMANCE

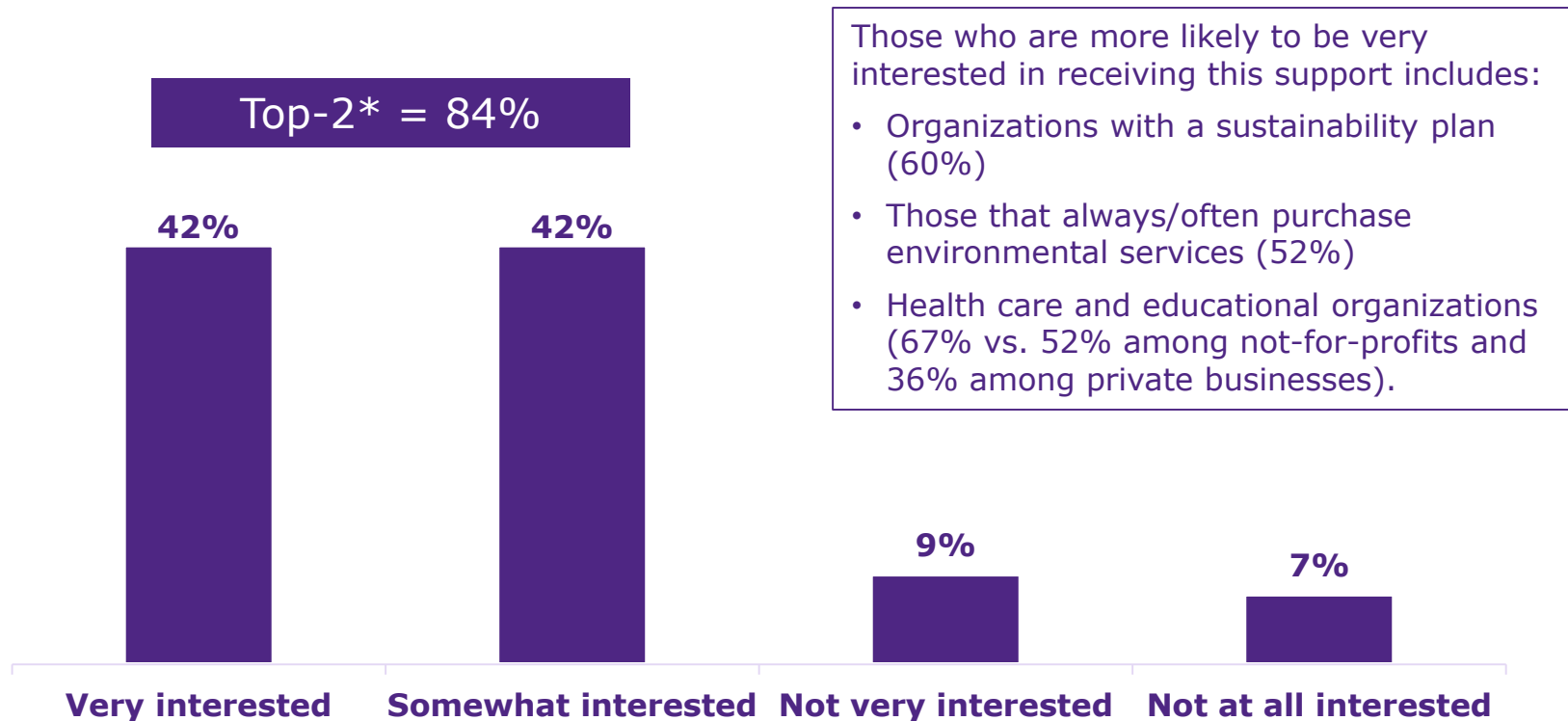
Three in ten consider the City of Saskatoon to be doing an excellent or good job in helping organizations reduce their environmental impact.



Q8. How would you rate the City of Saskatoon's efforts to help organizations in the City reduce their environmental impact?  
Would you say it is doing ...

# INTEREST IN RECEIVING ENVIRONMENTAL SUPPORT FROM THE CITY

More than eight in ten organizations are interested in having the City support their efforts to reduce environmental impact.



Q9. How interested are you in having the City of Saskatoon support organizations' efforts to reduce their environmental impact?

\*Top-2 refers to those who are very/somewhat interested

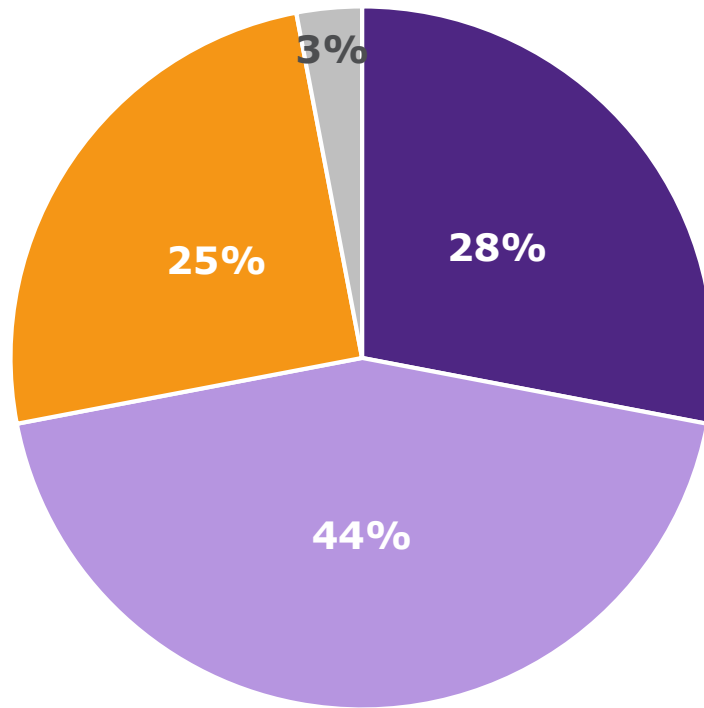




# Views Regarding Climate Change

# VIEWS ON CLIMATE CHANGE

Three in ten organizations believe climate change will have a major impact on them, with large organizations more likely to be bracing for the effects of climate change.



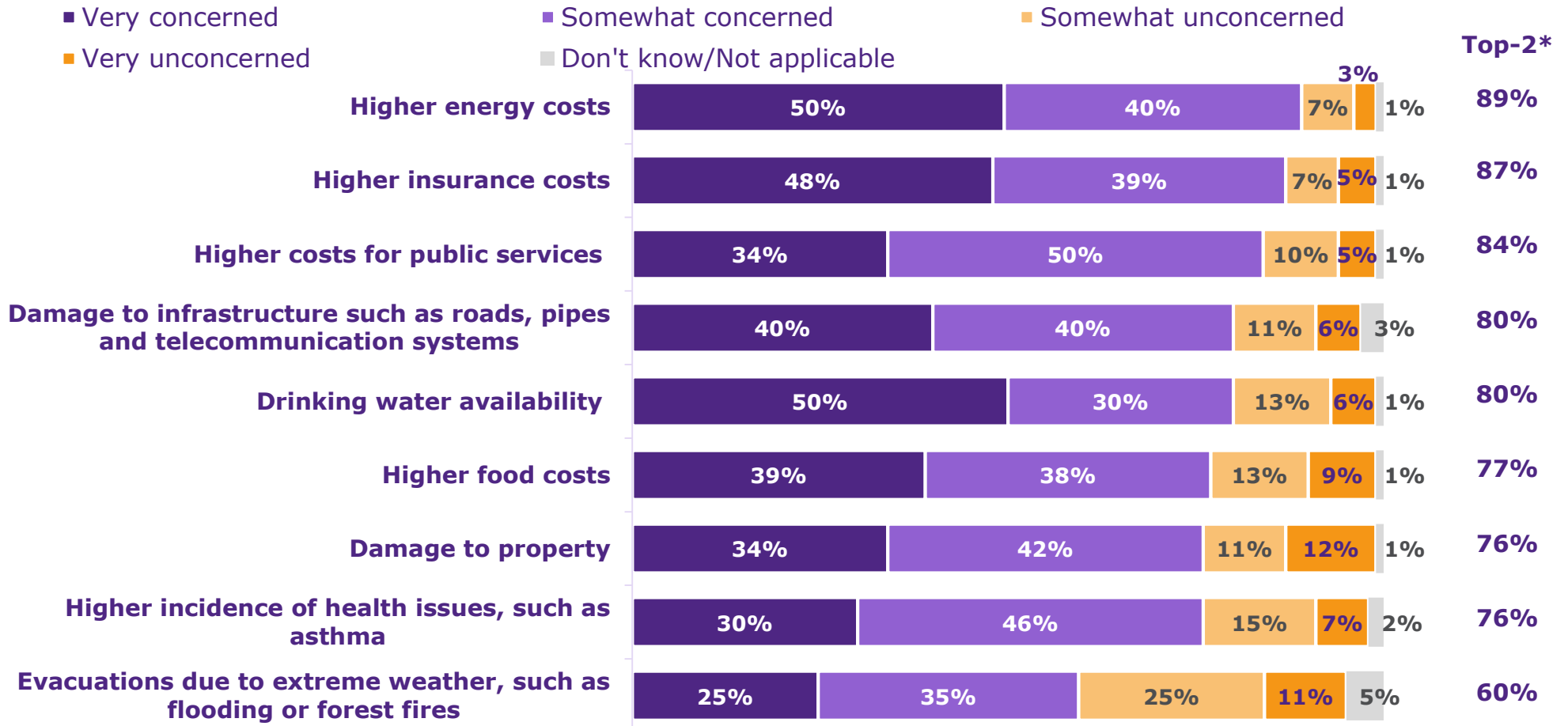
- Major impact
- Minor impact
- No impact
- Don't know/Not applicable

Views on Climate Change By Company Size			
	<10 employees	10-49 employees	50+ employees
Major impact	28%	22%	<b>46%</b>
Minor impact	41%	55%	33%
No impact	28%	22%	21%
DK/NA	4%	2%	--

Q10. Do you believe that a changing climate will have a major impact, a minor impact or no impact on your organization within the next 10 years?

# ORGANIZATIONAL CONCERN ABOUT CLIMATE CHANGE

Organizations are most likely to be concerned about higher costs for energy, insurance and public services.



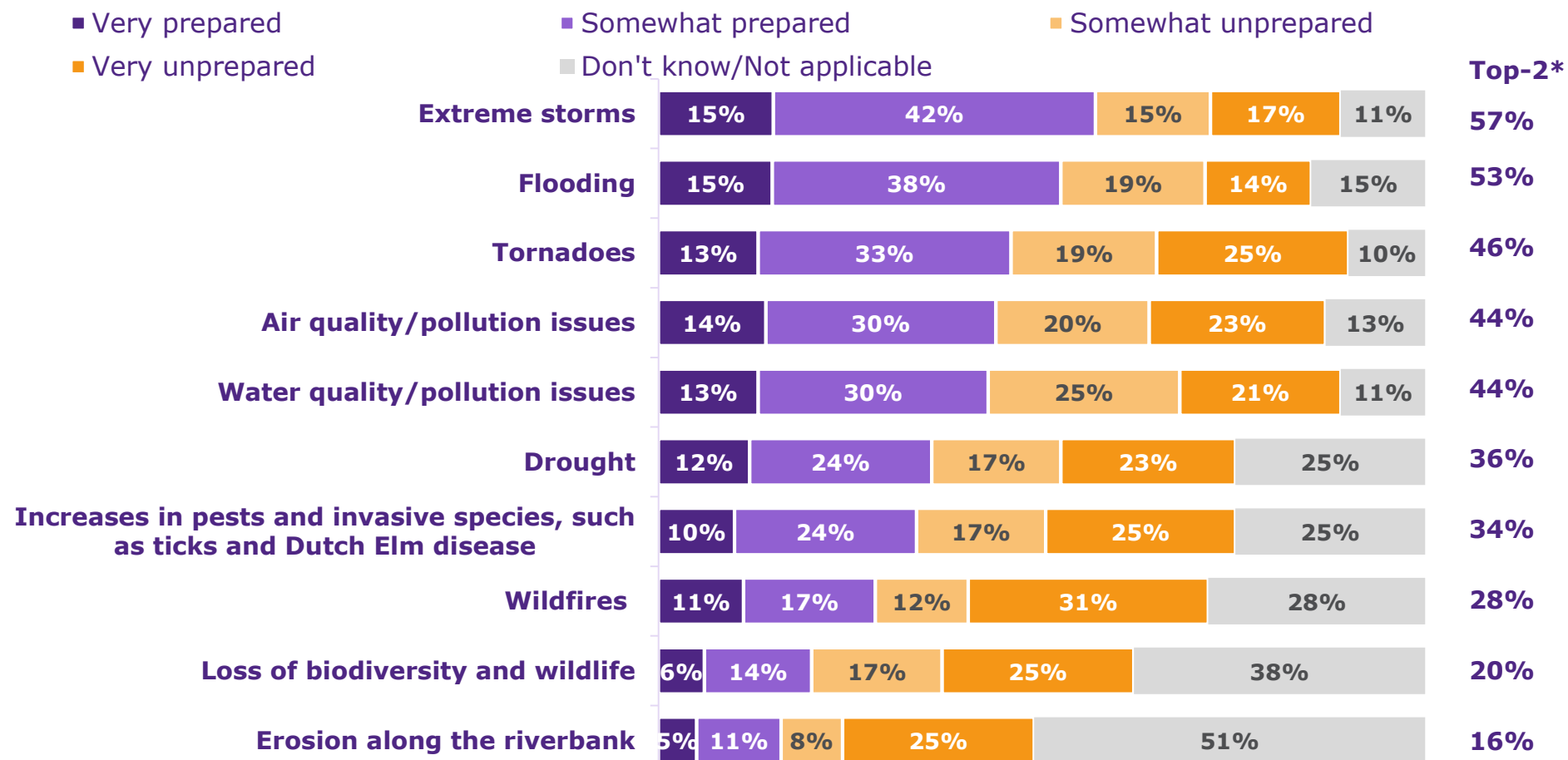
Larger organizations with 50+ employees are more likely to be concerned about drinking water availability (96% vs. 73% among those with 10-49 employees).

Q12. How concerned is your organization about each of the potential impacts of a changing climate?

\*Top-2 refers to those who are very/somewhat concerned

# PREPAREDNESS FOR CLIMATE CHANGE IMPACTS

More than half of organizations believe they are at least somewhat prepared to deal with extreme storms and flooding.



Health care and educational organizations are more likely to say they are very or somewhat prepared for most of these impacts.

Q11. Many businesses and organizations are taking action to adapt to a changing climate. How prepared is your organization to deal with the following impacts of climate change?

\*Top-2 includes those who are very or somewhat prepared

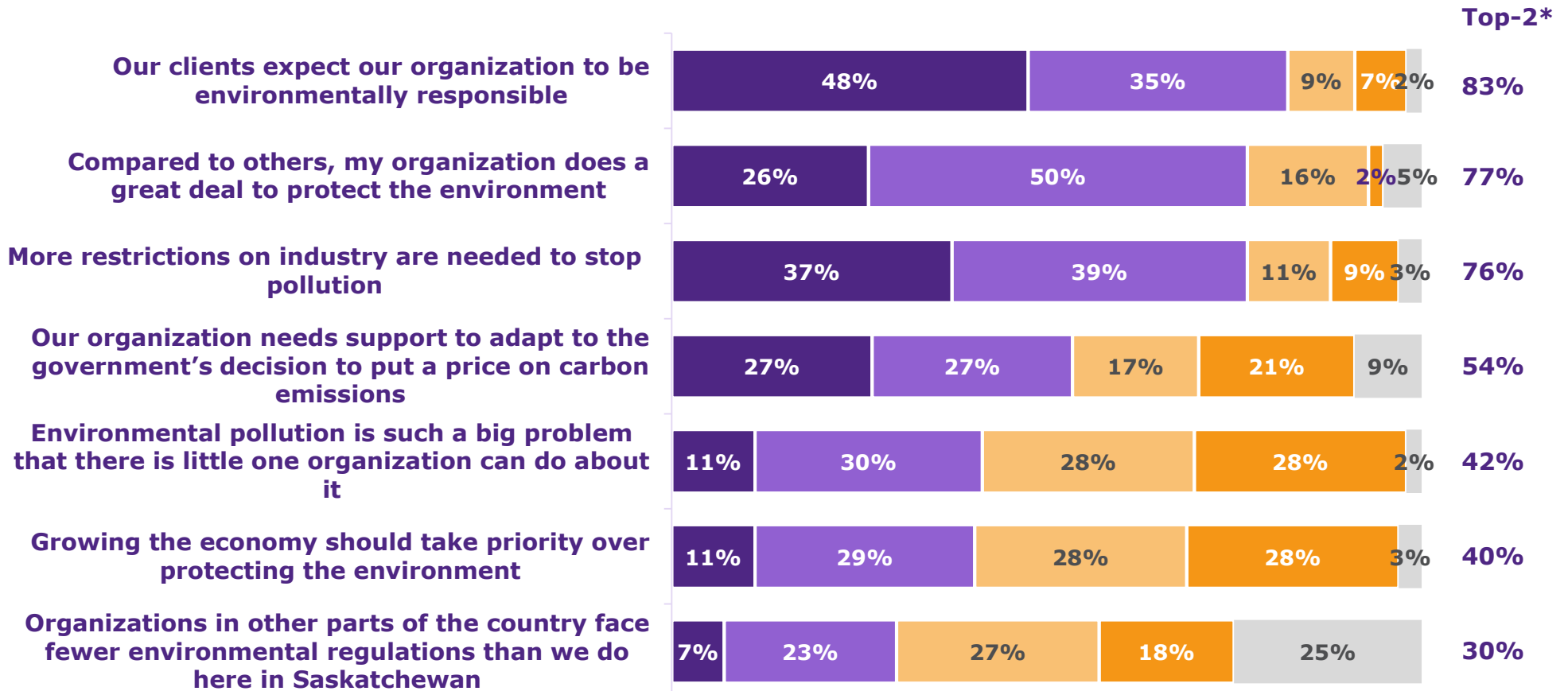


# Corporate Environmental Perceptions

# ATTITUDES REGARDING ENVIRONMENTAL ISSUES

More than four in five agree that their clients expect them to act in an environmentally responsible manner.

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know/Not applicable



Smaller organizations are more likely to agree that more restrictions on industry are required (84% among those with <10 employees).

Larger organizations are more likely to agree that their organization does more than others to protect the environment (92% among those with 50+ employees).

Q12. How concerned is your organization about each of the potential impacts of a changing climate?

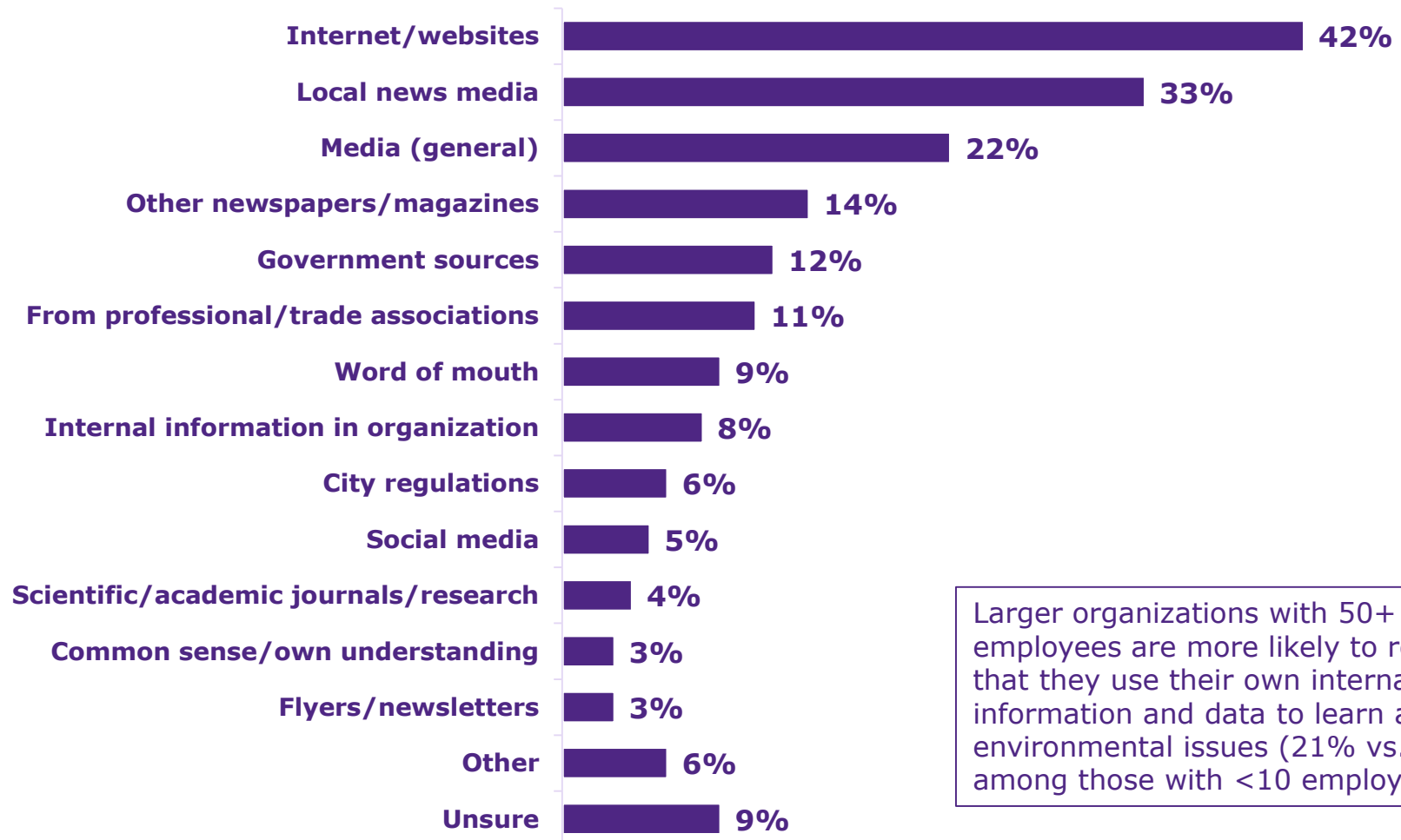
\*Top-2 includes those who strongly/somewhat agree



# Information Sources

# INFORMATION SOURCES ON ENVIRONMENTAL ISSUES

Organizations are most likely to obtain information about environmental issues online or through the news media.



Q14. What are the main sources of information your organization uses to learn about environmental issues?



The top right corner of the slide features a series of overlapping, light purple geometric lines that form a complex, abstract shape, possibly a stylized letter 'A' or a similar structure. The lines are thin and create a sense of depth and movement.

# Conclusions & Recommendations

# CONCLUSIONS/RECOMMENDATIONS

- ▶ Industrial, commercial and institutional organizations in Saskatoon are concerned about environmental issues; however, these concerns are more likely to be related to waste and recycling and less about climate change and the impacts it will have on their operations. There is a relatively high level of interest in having the City of Saskatoon provide support to organizations, with this interest higher among public sector organizations that have the mandate (and a higher degree of capacity) to develop sustainability plans.
- ▶ When it comes to encouraging environmentally-friendly behaviours among ICI organizations, the key barriers appear to be practical limitations on what can be done (which are exacerbated, in part, by many organizations not having control over their buildings) and altering ingrained behaviours that take a concerted degree of effort to change.
  - ▶ The City should examine how it can best reach out to businesses and not-for-profit organizations, particularly those who may not be able to directly control their environmental behaviours because they do not operate their buildings. This may involve focusing on changing behaviours these organizations have control over, such as discouraging idling, turning off electronics and encouraging active transportation. This could be achieved by providing information to these organizations via key information channels, including the City's website, local media and business organizations.
  - ▶ At the same time, the City should also look at approaches that would encourage property management companies (as well as companies responsible for their own buildings) to provide more sustainable amenities, including installing energy- and water-saving devices. Because the cost of these improvements is a significant barrier, messaging related to these efforts should be focused on how these improvements can save these organizations money.



## CONCLUSIONS/RECOMMENDATIONS CONTINUED



- ▶ There is a clear expectation, particularly among larger organizations, that environmental responsibility is a core part of their business. The majority of organizations also believe that they do more than their fair share to protect the environment.
  - ▶ The City should leverage these perceptions to continue encouraging organizations to do their part and consider sharing specific success stories that may encourage other organizations to do their part to be more sustainable.
- ▶ Organizations are most likely to obtain information about the environment on their own online, or through a variety of different news media. The City should primarily use these channels to communicate about environmental issues with ICI organizations, and supplement this with outreach to individual organizations and industry/trade associations, which also play an important role in disseminating this information to their stakeholders.

**FOR FURTHER INFORMATION OR QUESTIONS CONTACT:**



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