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TO:	CHAIR AND MEMBERS CIVIC WORKS COMMITTEE MEETING ON APRIL 20, 2015
FROM:	JAY STANFORD DIRECTOR, ENVIRONMENT, FLEET, & SOLID WASTE
SUBJECT:	COMMUNITY RESEARCH SNAPSHOT - HOW GREEN IS LONDON?

RECOMMENDATION

That, on the recommendation of the Director of Environment, Fleet and Solid Waste, this report providing a snapshot of the community research carried out by Environics Analytics on Londoners' attitudes and social values related to environmental issues, **BE RECEIVED** for information.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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The relevant report that can be found at www.london.ca under City Hall (Meetings) is:

- Report to the July 21st 2014 Civic Works Committee (CWC) Meeting, Community Energy Action Program (Agenda Item #16)

BACKGROUND

PURPOSE:

The purpose of this report is to:

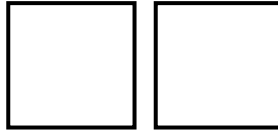
- provide Committee and Council background information on the report titled Analyzing Environmental Perceptions, Attitudes and Actions of Londoners (a demographic and spatial market analysis) carried out by Environics Analytics; and
- provide a resource for use by City staff, businesses, Londoners, community groups, and students engaged in environmental actions in London to improve engagement with Londoners by having a better understanding of the audience.

CONTEXT:

The Need for Improved Environmental Information at the Community Level

With our years of experience in delivering environmental programs to Londoners - through attendance at community events, public opinion research, London's Roundtable on the Environment and the Economy, Rethink London, advice offered by experts on community-based social marketing, participation in local community-based research performed by Western University, along with many other projects – it is well known that there are many issues that Londoners care about. Environmental issues are important to Londoners, but they are often not at the top of the list, such as the state of the local economy, employment, and health care.

For example, numerous actions identified in London's Community Energy Action Plan (CEAP) highlighted the importance of working closely with Londoners to meet their needs to achieve higher levels of energy conservation and increased sustainability with their actions. As noted above, the importance of many different issues to Londoners (and often considered to be more important than environmental issues) represents both fundamental challenges and opportunities in terms of community engagement. Existing programs can either be improved and/or new initiatives can be developed to ensure that these background details regarding what Londoners care about are addressed.



An upcoming community engagement project named Active & Green Communities as part of CEAP has adopted these broader issues that appeal to Londoners to take advantage of the linkages between their environment, health, saving money, and strengthening their neighbourhood. These elements all make for a more sustainable and resilient city, which also aligns with London's Strengthening Neighbourhoods Strategy that is being updated this year.

During the project design phase for the upcoming Active & Green Communities engagement strategy, coupled with a review of the outcomes of a number of environmentally-based community engagement projects in 2013 and 2014, a number of unresolved 'burning questions' were developed including:

- How do environmental attitudes and values vary across London?
- Do environmentally-like minded households cluster in the same neighbourhoods of London, and are there some "green" neighbourhoods that we are not aware of?
- Are there better ways to reach Londoners with environmental information, and does this vary across London?
- How can we better motivate Londoners to take actions for the environment that make London a better place?
- How can we do a better job selecting neighbourhoods for new pilot projects to ensure that the data obtained has a wider benefit across London?
- What information can help community and business leaders increase engagement within the community?

Reducing the Gap in Environmental Information at the Community Level

In November 2014, Environmental Programs staff asked Environics Analytics, a marketing and analytics services company, to use the information contained in the Prizm Social Values database to help understand Londoners' key environmental motivators and help to address key questions. The results of this work titled Analyzing Environmental Perceptions, Attitudes and Actions of Londoners are summarized in this report.

As background, since 2010, the City of London has been working with Environics Analytics to make use of their Prizm geodemographic information service to help guide activities undertaken by City staff. This work started off with a focus on neighbourhood services, but has since expanded to include a wide range of staff from:

- City Manager's Office
- Environmental & Engineering Services
- London Public Library
- Neighbourhood, Children, and Fire Services
- Parks and Recreation Services
- Middlesex London Health Unit

Through a three-year contract to the Prizm service (expires December 2015), City staff gain access to the Prizm database, training on how to use the tool, and up to 80 hours per year of consultation time from Environics Analytics. A number of analyses have been undertaken or are underway including:

- Water Engineering is in the process of using Environics Analytics' segmentation analysis (i.e., dividing a broad market area into defined subsets and categories) and personification (i.e., provides the detail needed to develop an image of who this segment of the population is) of household water use in London based on water mapping data.
- the Canadian Marketing Association honoured London Fire Services and Environics Analytics with a bronze award for a data-based marketing campaign, "Fighting Fires with Marketing Analytics" in December 2014

2015-2019 - Strategic Plan for the City of London

Municipal Council has recognized the importance of community engagement, environmental issues, and the need for a more sustainable city in its 2015-2019 - Strategic Plan for the City of London ([2015 – 2019 Strategic Plan](#)). Specifically, all Four Areas of Focus address, at one level or another, these important matters as follows:



Strengthening Our Community

- Healthy, safe, and accessible city

Building a Sustainable City

- Convenient and connected mobility choices
- Strong and healthy environment
- Beautiful places and spaces

Growing our Economy

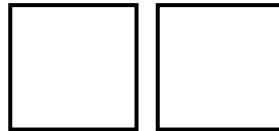
- Local, regional, and global innovation
- Strategic, collaborative partnerships

Leading in Public Service

- Collaborative, engaged leadership
- Excellent service delivery

**SNAPSHOT – HOW GREEN IS LONDON?
A Brief Look at a Few Key Findings**

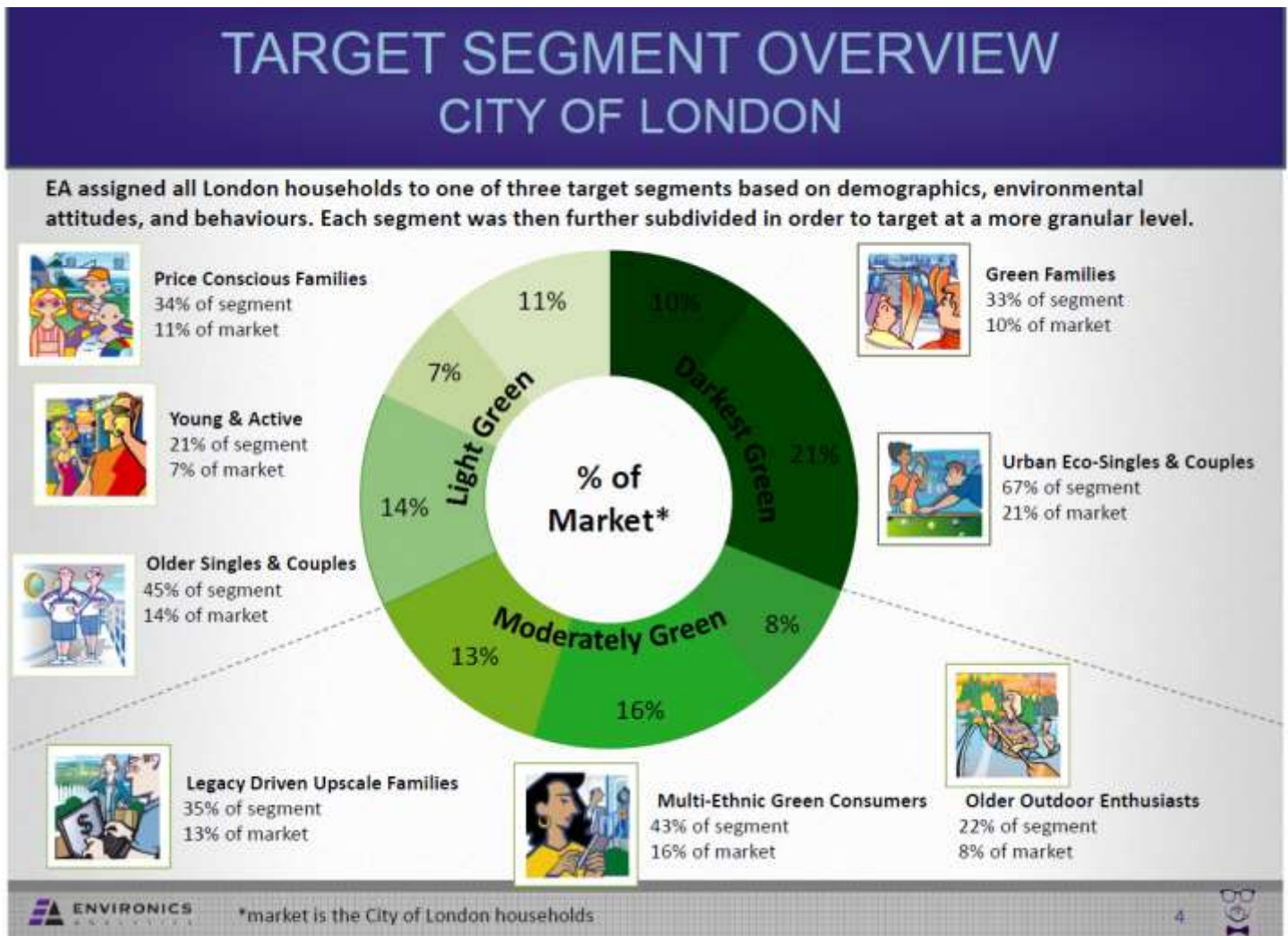
- London is ‘green to the core’ but there are clearly different shades of green across the city. The research project has identified 8 specific categories for households and grouped them within 3 broad segments: Darkest Green, Moderately Green and Light Green.
- About 50,000 London households (about 30% of London) are considered to be “Darkest Green”, with strong motivations for environmental action
- Dark Green households are found in all quadrants of London, not just where you’d expect them to be such as Old South and Old North.
- Green Families, within the Darkest Green segment, about 10% of London, are more likely to purchase items that support an ecological lifestyle, and are more likely go to a health/fitness club, golf, mountain bike, and downhill ski.
- On the opposite end, Price Conscious Families, within the Light Green segment, about 11% of London, are more likely to participate in organized sports such as skating, hockey, and baseball/softball, as well as outdoor activities like jogging and mountain biking.
- Legacy (i.e., making the world a better place for future generations) is a value which resonates with a strong majority of households in London (about 70%).
- Even in Old South, an area of London traditionally assumed to be “green”, there is a mix of Darkest Green, Moderately Green and Light Green.
- Households can care about the environment in different ways. Green Families are more likely to follow an ecological lifestyle and desire strong environmental protection, but they are not the “back to nature” type. Conversely, Older Outdoor Enthusiasts like to spend a lot of time in natural settings, but they don’t necessarily follow an ecological lifestyle nor always a strong advocate for environmental protection.
- Use of online social networking is fairly consistent across all eight groups, ranging from 33% for Older Outdoor Enthusiasts to 40% for Price Conscious Families. This further highlights the growing importance of social media but also recognizes that traditional methods of reaching audiences as having the greatest reach.
- Newspapers, radio and television remain vital to environmental information flow however important differences occur across 8 categories that will influence outreach and engagement potential.



DISCUSSION:

What Has Been Learned to Date?

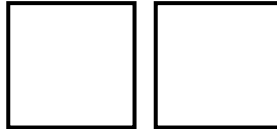
Environics Analytics has broken down London households (i.e., the “market”) into three broad segments – Darkest Green, Moderately Green, and Light Green – which are further subdivided into eight groups as illustrated and described below. The purpose of “segment personification” is to provide a mental picture of these households in order to help understand our citizens better.



Source: Analyzing Environmental Perceptions, Attitudes and Actions of Londoners, Environics Analytics, 2015.

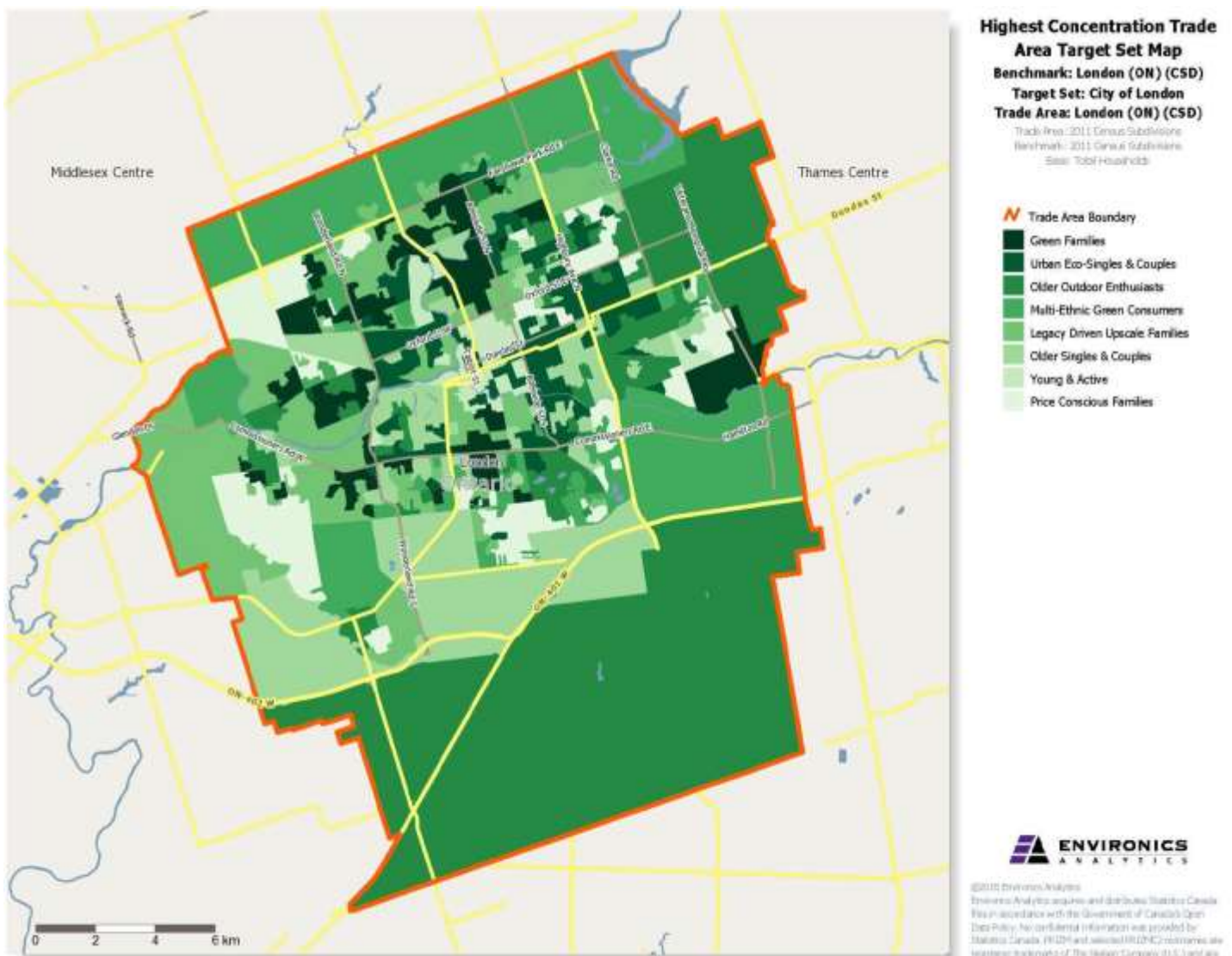
Environics Analytics has provided the following descriptions for these eight groups:

- **Green Families** (17,000 households) contains affluent middle-aged and older environmentally-conscious families with university-aged children living at home. These residents are concerned about what the future holds for the next generation, but are less likely to respond to pleas from the government or nature imagery which encourages them to be more ‘green’.
- **Urban Eco Singles & Couples** (36,000 households) contains downscale urbanites who are concerned about the environment - both globally and locally. As a result they consider the environmental impact of their purchase decisions. These globally minded individuals are more concerned about the immediate impact of their choices, and are less concerned about the future.
- **Older Outdoor Enthusiasts** (14,000 households) are concerned about the environment but no more than the average London resident. These mature couples and families enjoy being outdoors and their love of nature is something they would like to pass on to future generations. However, they are less likely to respond to pleas from the government to be more ‘green’.
- **Multi-Ethnic Green Consumers** (27,000 households) are health conscious, large suburban multi-ethnic families, which take price and the environment into consideration when making a purchase. Residents in this segment are more likely to be drawn toward messages which focus on the savings and health benefits associated with reducing their carbon footprint.

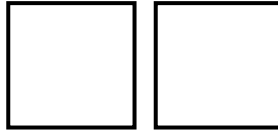


- **Legacy-Driven Upscale Families** (22,000 households) contain highly educated, large families, living in older single-detached homes. Residents prioritize their health, and are deeply concerned about the legacy which they will pass on to future generations. Messages which speak to the immediate health benefits of reducing greenhouse gas emissions may resonate with this segment.
- **Price Conscious Families** (19,000 households) contain middle-aged families with tweens & teens who always consider cost when making a decision. They are less concerned about the environment, but are concerned about what they will leave for future generations. Highlighting the savings associated with a ‘greener’ lifestyle - which they can then spend on their kids - may resonate with them.
- The **Young & Active** segment (12,000 households) contains young, upwardly mobile, urban singles and couples who are less concerned about the environment. These individuals take pride in maintaining a healthy lifestyle so messages which speak to the impact the environment has on your personal health – from the food you eat, to the air you breathe - may capture their attention.
- **Older Singles & Couples** (24,000 households) are not particularly concerned about the environment, but are slightly concerned about what will be left for future generations. Given that their household income is lower than the City of London average, they may be attracted to messages which focus on the savings associated with being ‘green’.

The following map illustrates where these groups can be found throughout London:



Source: Analyzing Environmental Perceptions, Attitudes and Actions of Londoners, Environics Analytics, 2015.



Appendix A contains a summary of many insights obtained for these eight groups, such as how to best position messages to these groups and what marketing tools and media are more likely to be effective.

Appendix B contains an excerpt for this report for Green Families to illustrate the wealth of information provided. The complete report is 118 pages and can be found on the City of London website www.london.ca by searching “How Green is London”.

What is the Connection and Benefit with City of London Programs?

The information provided by the Analyzing Environmental Perceptions, Attitudes and Actions of Londoners work will provide many benefits including:

- For City staff, undertaking an environment-related activity in a specific neighbourhood, it will provide them with a better understanding of the residents they will be working with in that neighbourhood as well as the best media channels to use to reach them.
- For City staff, looking for the best neighbourhoods in London to try out a new environmental-related activity, it will provide them with a better understanding of where the most or least receptive audience may be found.
- For determining the appropriate mix of community engagement methods to increase the ability of reaching residents.

Both of these benefits will help to improve the efficiency of service delivery by City of London service areas engaged in environmental-related activities such as:

- Active Transportation (AT) and Transportation Demand Management (TDM)
- Urban watershed protection
- Waste reduction and diversion
- Stormwater management (e.g., basement flooding)
- Sewer operations (e.g., Washing Initiative to Protect our Environment (WIPE))
- Parks planning (e.g., Adopt a Street, Adopt a Park)
- Neighbourhood action planning and related programs (e.g., London Strengthening Neighbourhoods Strategy including the upcoming changes, Walk to Shop, etc.)

How Will Londoners and London Businesses Benefit from this Information?

Many of our community partners (e.g., Middlesex-London Health Unit, Upper Thames River Conservation Authority), as well as local businesses, academics, and students, will be able to use this work in similar ways. Some examples include:

- Local businesses offering “green” products and services can use this information to help find the best markets for these products and services.
- Utility companies looking to promote conservation programs in specific areas of London can use this information to develop both the key messages and the best media to use for their programs.
- Environmental groups can use this information to find the best neighbourhoods in London to try out a new environmental-related activity, recruit volunteers, etc.
- Teachers and college/university professors can use this information to assist with curriculum development as well as research project topics.
- Students can use this information to assist with projects and research papers.

How was the Project Funded?

As noted earlier, many City of London service areas share the cost for the annual subscription to the Prizm service, allowing City staff access to the Prizm database, training on how to use the tool, and up to 80 hours per year of consultation time from Environics Analytics. Most of the analysis work was carried out using the consultation hours that were available through the annual subscription, with an additional \$6,500 spent to expand the analysis and interpretation, examine data findings, and prepare the report.

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What are the Immediate Next Steps?

With the upcoming launch of Active & Green Communities, this report will be shared with all current and upcoming project participants so that the insight provided by this report can assist with the delivery of these programs. This information will also be:

- used to assist in the planning for upcoming CityGreen displays at upcoming spring and summer events.
- shared with members of the London Environmental Network, which was officially launched in March 2015, so that it can be used as a project planning resource for its members.

In the spirit of the City of London’s Open Data policy, this report will be made available on the How Green is London webpage on the City of London website for use by Londoners and London businesses.

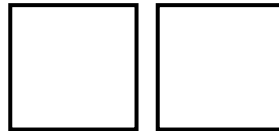
ACKNOWLEDGEMENTS:

This report was prepared with assistance from Kate Graham, Manager of Corporate Initiatives, and Donna Baxter, Manager of Policy & Research, Recreation & Neighbourhoods.

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Appendix A Key Insights from the Analyzing Environmental Perceptions, Attitudes and Actions of Londoners (Environics Analytics, 2015)

Appendix B Green Families Section from Analyzing Environmental Perceptions, Attitudes and Actions of Londoners (Environics Analytics, 2015)



Appendix A

Key Insights from the Analyzing Environmental Perceptions, Attitudes and Actions of Londoners (Environics Analytics, 2015)





It is important to note that demographic information such as this provides a broad picture of the dominant characteristics of households in these neighbourhoods. In every neighbourhood, you will find people from most, if not all, of the eight groups identified. You will also find households that do not fit neatly in to any of these eight groups.

The Analyzing Environmental Perceptions, Attitudes and Actions of Londoners report also provides the following information for each of these segments:

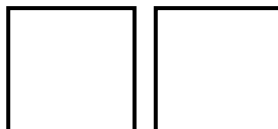
- Demographic highlights (age, education level, income, size of household, ethnic diversity)
- Summary of social values (values that resonate, and values that turn them off)
- Summary and detailed breakdown of media usage (newspaper, magazine, radio, television, internet, direct mail/flyers & billboards)
- Sports & leisure activities





The following two tables illustrate in a summary fashion how this information could be used by City staff, as well as local environmental groups and green businesses, to help reach these eight groups.

You will note that social media itself (Facebook, Twitter, etc.) is not specifically identified in the summary from Environics Analytics. This is due to the fact that the use of online social networking is fairly consistent across all eight groups, ranging from 33% for Older Outdoor Enthusiasts to 40% for Price Conscious Families. What is important is the message that is used when using social media as part of an outreach and engagement campaign – if the message does not resonate with that group’s interests and values; they are less likely to click on that post or tweet. Environics Analytics has identified opportunities for the use of blogs to engage some of the Light Green groups such as Price Conscious Families and Young & Active on environmental topics – as long as the message resonates.

 <p>Green Families 33% of segment 10% of market Darkest Green</p> <ul style="list-style-type: none"> • Consider outreach initiatives at local high schools, universities and colleges • Position this initiative as a way to holistically adhere to a green lifestyle • Relay the savings associated with reducing green house gas (GHG) emissions • State the affect GHG will have on future generations and the environment • Reach this group by advertising in newspapers such as the London Free Press or on news/talk radio stations • Make sure the communication to this segment is simple and clear • Flyers in newspapers or found in polybags may capture their attention • Consider having a presence at music concerts • Conceive a way to link this initiative to various sports either in the form of marketing imagery or advertisement placement 	 <p>Urban Eco-Singles & Couples 67% of segment 21% of market Darkest Green</p> <ul style="list-style-type: none"> • With almost 70% of this segment renting apartments, highlight how even renters can still make an impact on the environment • Strategically placed ads on public transit may reach this group • Consider placing ads in the weekday edition of the London Free Press • Challenge this group to make a difference; reinforcing their duty not only to their local community, but to the world • Position the campaign as an opportunity for them to take control of their green house gas emissions • Consider distributing brochures or e-newsletters about the initiative • Ads or outreach efforts in shopping malls may reach this audience • Ensure that online content is mobile friendly
 <p>Older Outdoor Enthusiasts 22% of segment 8% of market Moderately Green</p> <ul style="list-style-type: none"> • Highlight the savings associated with reducing GHG emissions • Consider placing radio spots on country (traditional or new) and oldies stations • Consider placing ads in community newspapers or business section of the London Free Press • Consider ads or a feature during the early evening or late local news • Appeal to their love of the outdoors by stating how they are needed to help preserve nature for future generations • Make sure the call to action for the campaign is easy and does not require a lot of time or technological literacy • Residents are more likely to use any form of direct mail • Residents are more likely to enjoy outdoor activities such as fishing 	 <p>Multi-Ethnic Green Consumers 43% of segment 16% of market Moderately Green</p> <ul style="list-style-type: none"> • Consider outreach initiatives at local elementary schools • Consider publishing content in languages other than English • Residents live in larger households and may be interested in the savings associated with reducing their GHG • Comment on the positive impact this initiative will have on future generations • Reach this group via the internet; ensure that online content is mobile friendly • Strategically placed ads on public transit may reach this audience • Emphasize that participation in this program will be convenient • Consider placing ads in the London Free Press • Consider holding outreach efforts or placing ads in shopping centers





 <p>Legacy Driven Upscale Families 35% of segment 13% of market Moderate Green</p> <ul style="list-style-type: none"> Residents live in larger households and may be interested in how to reduce their energy bill Despite their high household income residents are saver by nature. Highlight the potential savings associated with this initiative Position living a sustainable life as something they can pass to their children Highlight how GHG's can affect the ability to maintain a healthy lifestyle Consider ads in newspapers such as the London Free Press Ensure that your website is viewable on mobile devices Resident enjoy a variety of sports. Exhibiting, sponsoring, or advertising at local sports events may reach this audience 	 <p>Price Conscious Families 34% of segment 11% of market Light Green</p> <ul style="list-style-type: none"> Residents live in larger households and may be interested in ways to reduce their energy bill Consider outreach at local elementary schools Draw residents in by appealing to their sense of being Canadian Discuss how this initiative will benefit their family, not the community! Consider a feature on CTV early evening news Encourage residents to blog about their experience with the initiative Ads on country radio or sponsoring a radio segment may reach this audience Residents enjoy a variety of sports. Exhibiting, sponsoring, or advertising at local sports events may reach this audience
 <p>Young & Active 21% of segment 7% of market Light Green</p> <ul style="list-style-type: none"> As renters in apartments, residents may not be interested in this initiative Highlight how GHG can affect their ability to maintain a healthy lifestyle Focus on how residents will personally benefit from this initiative Draw residents in by appealing to their sense of being Canadian Consider featuring the initiative on classic/alternative rock, urban or news/talk radio stations Consider getting a local influencer to blog about the initiative Ads on web-based e-mail sites (i.e. Gmail or Hotmail) may reach this audience Ads or outreach efforts in malls are more likely to reach this audience Residents are more likely to take 1-5 trips on the bus per week. Advertisements inside buses and in bus shelters may capture their attention 	 <p>Older Singles & Couples 45% of segment 14% of market Light Green</p> <ul style="list-style-type: none"> Older household maintainers 65+; and likely to only contain 1-2 persons As renters in apartments, residents may not be as interested in this initiative Highlight that efforts to reduce GHG emissions may result in cost savings To draw them in align the initiative with core Canadian values – looking after the needs of others before yourself Communication to this segment should be kept as simple as possible. Avoid technical jargon, and make appeals to them in person Consider placing an ads in a local paper such as the London Free Press Consider a TV feature on the noon news or late local news Direct mail in the form of flyers, envelopes or catalogues may reach them

Source: Analyzing Environmental Perceptions, Attitudes and Actions of Londoners, Environics Analytics, 2015.




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Appendix B

Green Families Section from Analyzing Environmental Perceptions, Attitudes and Actions of Londoners (Environics Analytics, 2015)

(NOTE: the complete report can be found on the How Green is London webpage on the City of London website.)






GREEN FAMILIES



PRIZM: 08/14/23
33% of segment
10% of market*

Green Families contains affluent middle-aged and older environmentally conscious families with university-aged children living at home. These residents are concerned about what the future holds for the next generation, but are less likely to respond to pleas from the government or nature imagery which encourages them to be more 'green'.

Demographic Highlights **

	Income	↑ \$118K
	Family w/kids	↑ 36%
	Hhd Size	↑ 27%
	Maint. Age	↑ 55+
	University	↑ 36%

City of London PRIZM Clusters	Key Segment Variables									
	Environmental Protection	Legacy	Importance of Price	Effort Toward Health	Active Government	Global Consciousness	Attraction to Nature	Ecological Lifestyle		
Green Families										
U1 08 Money & Brains	123	167	95	114	99	101	56	149		
S4 14 Upward Bound	131	123	98	132	42	72	70	123		
E2 23 Fast-Track Families	125	111	110	91	48	88	73	105		

ENVIRONICS ANALYTICS

*market is the City of London households; **compared to the City of London average

DEMOGRAPHIC HIGHLIGHTS

Older married families with large households

48%
of maintainers are 55+
vs. 40% in the City of London



62%
Married or
common law
vs. 54% in the City of London



48%
of families are
couples with children;
12% are lone-parent
vs. 44% and 18% in the City of London



36%
Have an university
degree
vs. 25% in the City of London



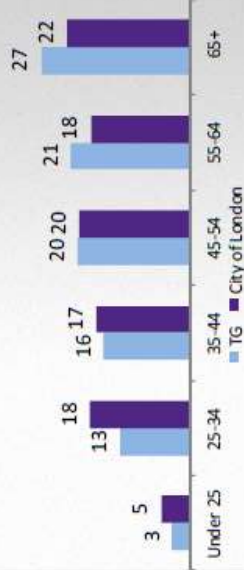
At **\$118K** the average household
income of this segment is 37%
higher than the market average
vs. \$86K in the City of London

38% (4,974)
of children at home are aged 15-24
vs. 35% in the City of London



Market Size
43,266 (11%) population
16,728 (10%) households

Age of Household Maintainer



81% report English as their
mother tongue
vs. 78% in the City of London

Demographic Overview

The Green Families group is composed of families with household maintainers aged 55+. They tend to have large household sizes with teenage to older children at home. They are highly educated with over 1/3 having an university degree. It is not a surprise that their average household income is higher than the London average, with many holding white collar occupation. They live in a mix of urban to exurban neighbourhoods in London, with many driving to work. Diversity is low within this group, with visible minority present at 13% versus 16% in the City of London. 81% reported speaking English as their mother tongue.



27%

of households contain 4+ persons
vs. 20% in the City of London

GREEN FAMILIES SOCIAL VALUES

Strong Social Values

- Legacy
- Primacy of Environmental Protection
- Ecological Lifestyle
- Pursuit of Originality
- Emotional Control
- Importance of Brand
- Obedience to Authority
- Aversion to Complexity
- Saving on Principle

Weak Social Values

- Enthusiasm for New Technology
- Fear of Violence
- Pursuit of Intensity
- Search for Roots
- Joy of Consumption
- Pursuit of Novelty
- Rejection of Authority
- Anomie/Aimlessness
- Attraction to Nature
- Sexism

Value Implications

The *Green Families* represents a segment of the population which places a lot of importance on the state of the environmental both globally and locally. These are individuals feel that environmental disasters around can be linked to the decision we make at home. As a result while shopping they are more likely than the average London resident to consider the environmental implications of their purchase.

Members of this segment have a strong desire to leave a lasting legacy after their death. This legacy could take the form of a environmentally sustainable way of life, or the preservation of green spaces for future generations.

The *Green Families* are savers by nature. Whether it's getting a deal on groceries or delaying the replacement of their water heater, it is very hard to separate these individuals from their money. Position the initiative as a way to save money by consuming less – whether it's electricity to heat/cool your home or gasoline to get to and from activities.

Members of this segment do not mind being told what to do from an authority figure. However, avoid images or messages which encourage them to embrace nature. Despite their environmental tendencies they do not appreciate the outdoors.

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GREEN FAMILIES MEDIA SUMMARY

The media habits of the Green Families are:

- Print usage is mixed, with moderate magazine and heavy newspaper readership
- Moderate radio listenership; listening to rock music, current hits, and news stations when they do
- TV viewership is light, but they watch a much broader than average variety of shows
- Internet use is moderate to heavy, and it's used for a variety of activities including accessing newspapers, music, and games

Direct & Outdoor preferences:

- Catalogues, flyers in newspapers and magazines, catalogues, and coupons tend to be the most popular direct mail option for this segment
- Low rates for taking trips on public transit
- Visit malls 2+ times per week
- Many travel long distances along roads and highways



Newspaper

Heavy

- London Free Press
- Editorial, finance/business, health, fashion, travel, sports, food sections



Magazine

Moderate

- enRoute, Report on Business, MoneySense, People, Macleans, Chatelaine, Style at Home



Radio

Moderate

- Album Rock/Classic Rock, Top 40/Current Hits, Modern Rock, All News, News/Talk/Information/Sport



Television

Light

- CTV Early Evening News, Sports, CBC Newsworld, BBC Canada, Discovery, History stations



Internet

Med-Heavy

- Email, searches, banking, maps, texts, social networking
- Access newspapers, music, games

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Note: "Top 10" lists have been identified by sorting all category variables by Index, then by % Penetration in the Index ranges 120+, and 100-119. Top 10 variables have a minimum % Penetration of 10%.

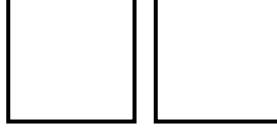
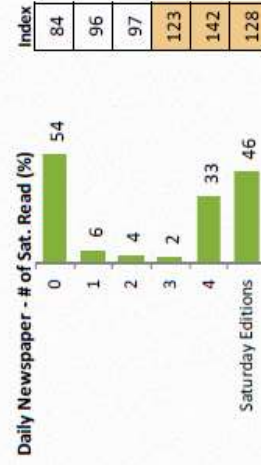
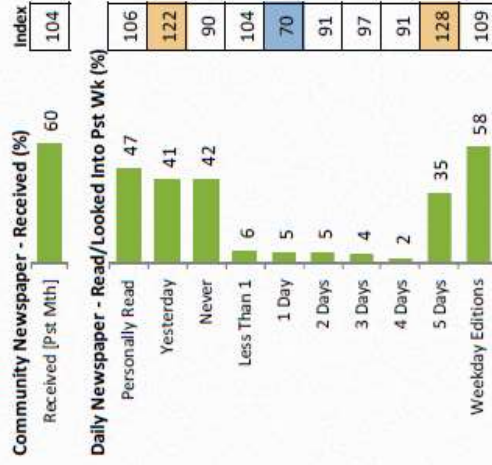
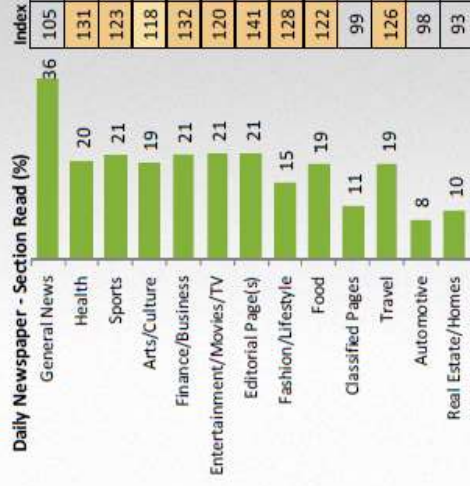
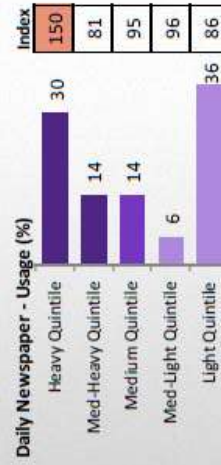
GREEN FAMILIES NEWSPAPERS

How much do they read?

- All national newspapers are read at high rates, with emphasis on the weekday and weekend editions
- More likely to read local daily newspapers such as the **London Free Press**

What do they read?

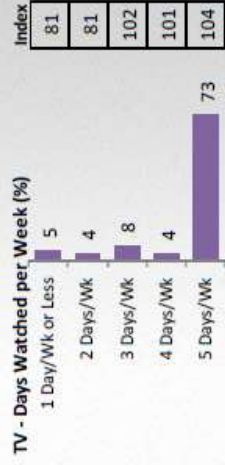
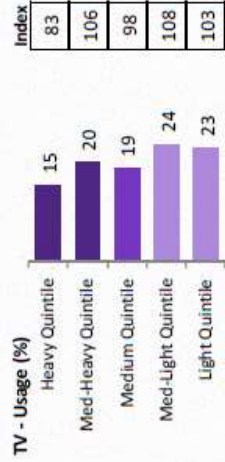
- Most sections of the newspaper are popular with this group
- Over 20% read the finance/business, entertainment, health, editorial and sports sections, more than the market average



GREEN FAMILIES TELEVISION

How much do they watch?

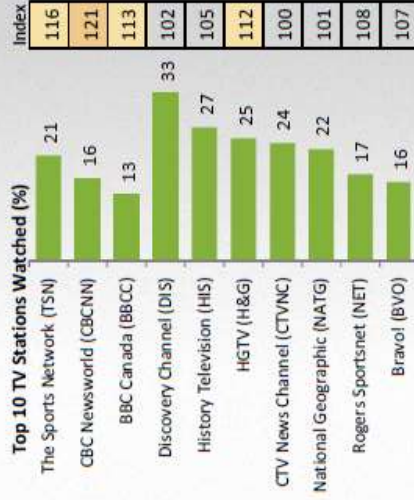
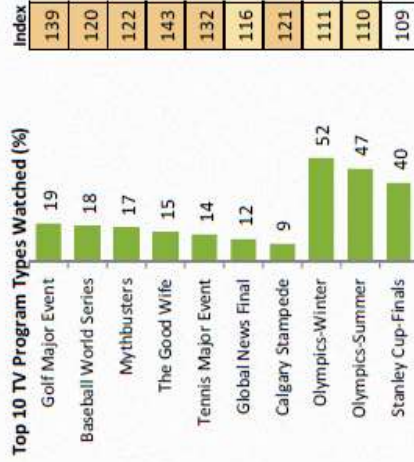
- Light to moderate viewers overall
- News and sports programs and stations are both popular and viewed at above average rates



What are they watching?



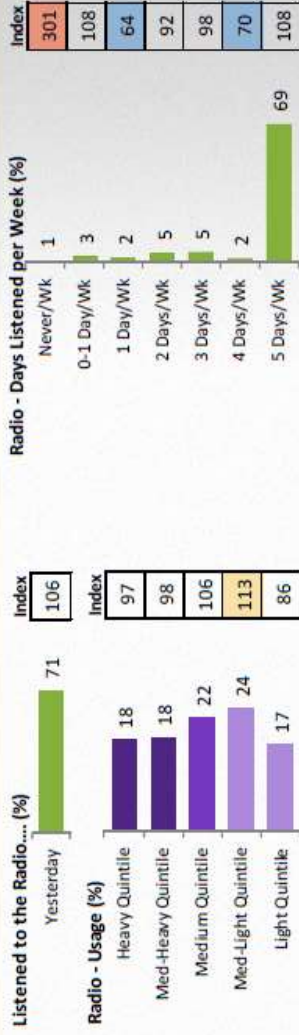
- Nearly one quarter watch CTV Early Evening News which is at above average rates
- Just 9 out of 100 people watch noon news mirroring the benchmark population
- And 12 out of 100 watch late local news which is the same as the general population



GREEN FAMILIES RADIO

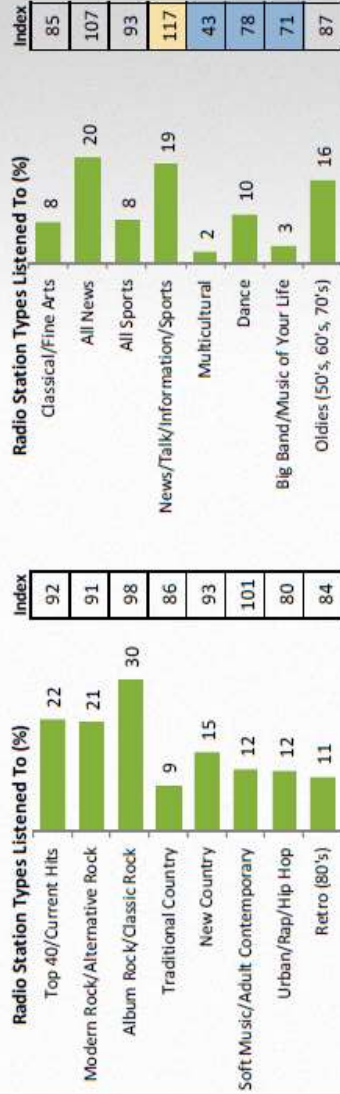
How much do they listen?

- Light to moderate listeners overall
- 7 out of 10 people listen five days a week



When they do listen, what are they listening to?

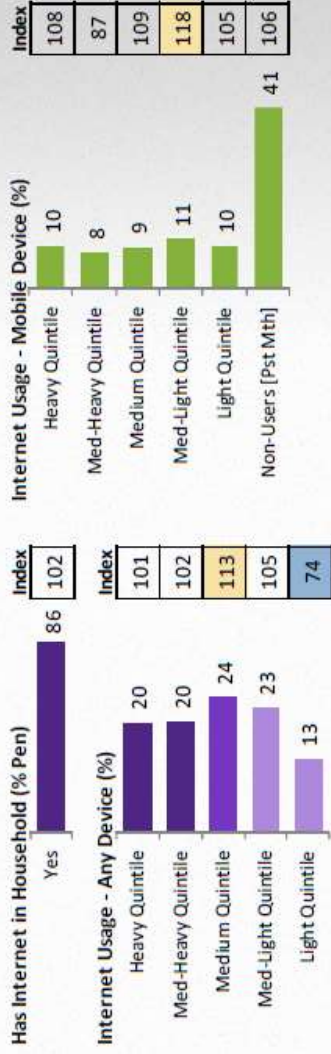
- Overall, Green Families listen at average to below average rates
- This group listens to news/talk/info/sports more often than the general population
- Album rock/classic rock, top 40/current hits, modern rock, all news are most popular



GREEN FAMILIES INTERNET

How often do they use the Internet?

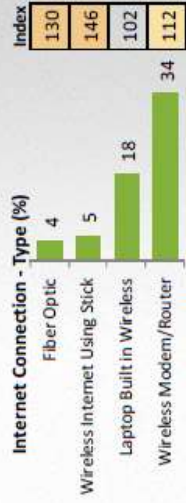
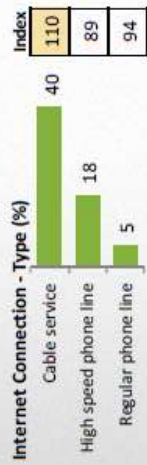
- Generally internet use on any device is mixed
- Similar usage rates are observed on mobile devices
- 20% of residents report that they are heavy users of the internet which tracks the market average



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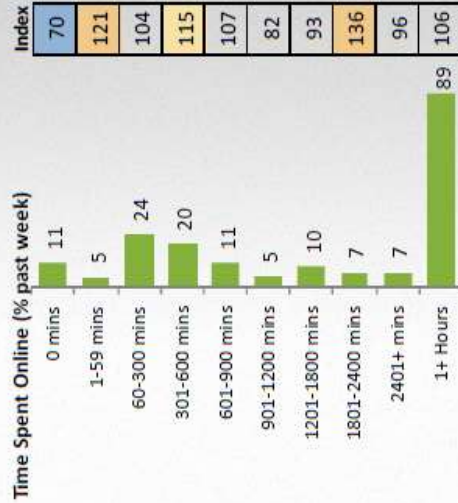
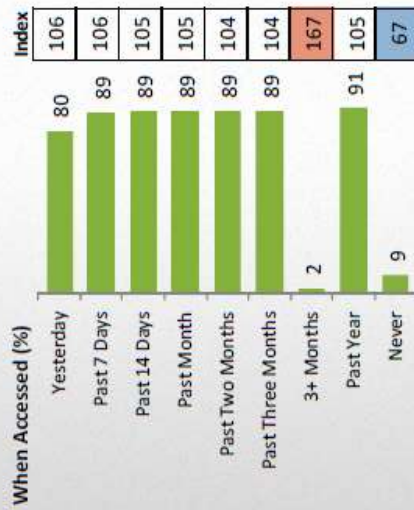
GREEN FAMILIES INTERNET

How do they access the Internet?



- Four out of ten people use cable service to connect to the Internet
- Wireless connection is popular as well

How often do they access the Internet?



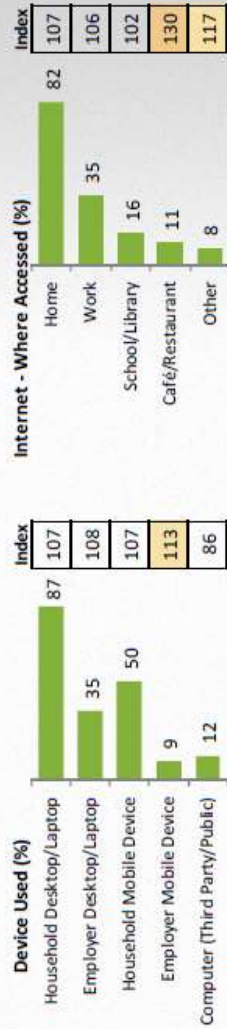
- 4 out of 5 people accessed the Internet yesterday
- Overall, this group is online at similar rates to the general population
- 1 out of 5 people spent 300 to 600 minutes (5-10 hours) online in the past week



GREEN FAMILIES INTERNET

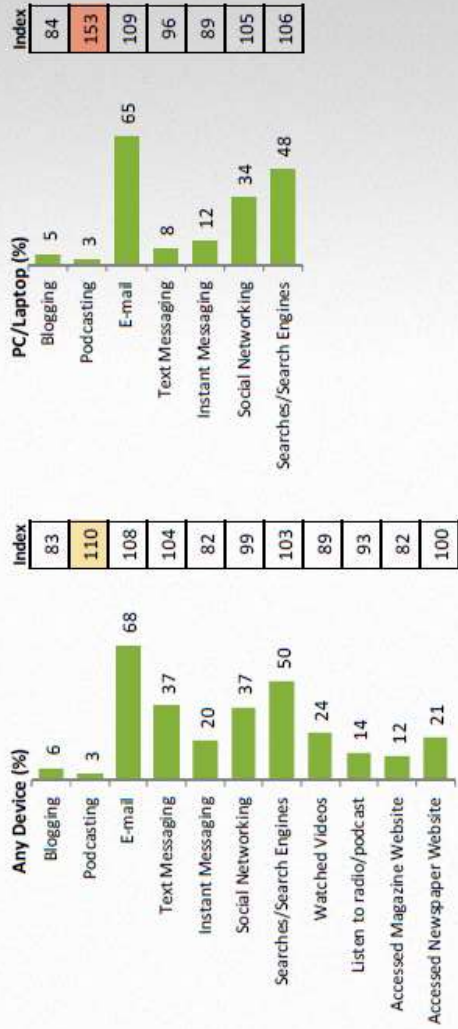
What type of device do they use?/Where do they access the Internet?

- The vast majority access the Internet from home using either a desktop or laptop
- Above average numbers of people in this group spend time online while visiting cafés and restaurants



What activities do they do online?

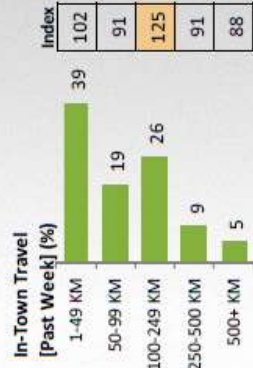
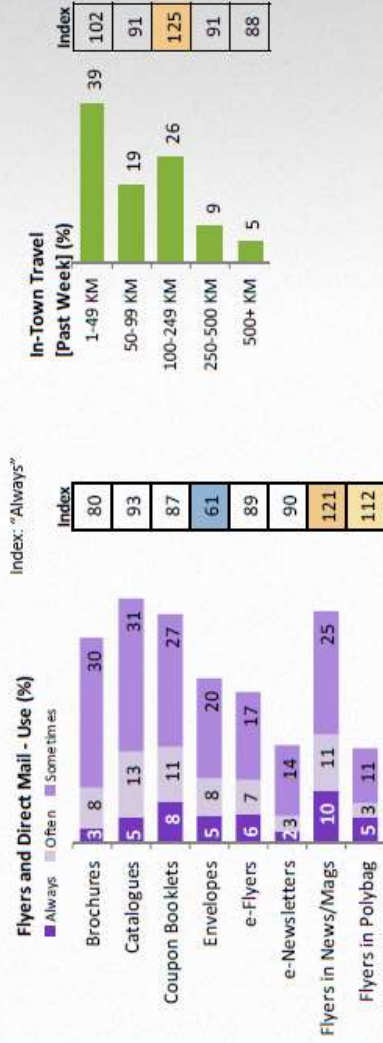
- Email and online searches are very popular online activities
- Social networking is popular too
- All online activities are at rates that mirror the general population or less



GREEN FAMILIES DIRECT & OUTDOOR

How do they feel about direct mail?

- Catalogues, flyers in newspapers and magazines, and coupons tend to be the most popular direct mail options for this segment
- Flyers in polybags are preferred by a small number of Green Families
- Outdoor ads along roads and highways may resonate since many travel distances between 100 to 249 km



How often do they visit malls or take trips on public transit?

- Two thirds visited a mall last week
- One person out of 4 went to the mall two or three times in the past week
- 8 out of 10 did not take any public transit in the last week
 - Ads in public transit space may not reach this audience

