

ENVIRONICS

RESEARCH

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Ce rapport est aussi disponible en français.

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Executive summary

Background and objectives

Canada is one of the world's leading producers of natural resources and is also one of the highest per capita users of energy. As such, the importance of natural resources to this country cannot be overstated. The priorities of the Government of Canada (GC), and of Natural Resources Canada in particular, are as follows:

- To invest in clean energy technology delivering benefits for the environment and the economy, including jobs.
- To regain public trust through appropriate regulatory oversight, credible environmental assessments and respect for the rights of those most affected by resource-based projects.
- To take national leadership on climate change by protecting the environment and growing the economy.

This research was conducted to assess, through qualitative and quantitative means, Canadian public opinion on a wide range of natural resource issues relating to forests, mining, energy (including energy efficiency), clean technology, climate change, government science and public confidence in the management of major natural resource projects.

The results of this research will inform the Government of Canada of the opinions and perceptions of Canadians on key resource issues and will ensure that departmental plans, policies and communications are responsive to the needs of the public.

Methodology – Qualitative research

A series of 10 focus groups was conducted between May 23 and 30, 2017. Two English focus groups were held in each of Toronto (May 23), Calgary (May 24), Vancouver (May 25) and St. John's (May 30), and two were conducted in French in Montréal (May 29). The participants in these focus groups were segmented by household income – the first group in each city was composed of Canadians with lower and middle household incomes and the second group was composed of Canadians with higher incomes. One hundred participants were recruited and 85 attended. Participants received an \$85 honorarium. Focus group sessions were about 90 minutes.

Focus group participants were selected according to the Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.¹ More detailed information on the qualitative research is provided in the Methodology section of the report (Section III), along with a copy of the research instruments (Appendix B).

Statement of limitations

Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as indicative rather than projectable.

¹ Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.
<https://www.tpsgc-pwgsc.gc.ca/rop-por/documents/rechqual-qualres-eng.pdf>

Methodology – Quantitative research

For the quantitative research, Environics conducted a 13-minute telephone survey among a representative, nationwide sample of adults aged 18 years and older from June 14–30, 2017. The 2,218 completed surveys yielded a margin of error of +/-2.1 percentage points, 19 times out of 20. The sample is a dual-frame land line and cell phone, probability-based, random digit dialling (RDD) sample. The Standards for the Conduct of Government of Canada Public Opinion Research -Telephone Surveys² were applied in the recruitment of participants. More detailed information on the qualitative research is provided in the Methodology section of the report (Section III), along with a copy of the questionnaire (Appendix A).

Key findings – Qualitative

General attitudes toward natural resources

- Forests and forestry, oil and gas, and water were words mentioned most often by participants when thinking of Canada's natural resources, followed less commonly by renewable energies such as wind and solar, mining and hydro. Some participants also tended to describe Canada's natural resources as "vast" or "plentiful."

Role of the federal government

- When asked what role the federal government has or should have in relation to natural resources, participants most often suggested it was primarily to regulate industry and provide environmental protection. Mentions of specific environmental protections included protecting water, forests and ecosystems and preventing over-exploitation of resources.
- Most participants struggled to spontaneously list any recent action taken by the federal government that related to natural resources. To the extent that people were aware of anything, they tended to mention recent pipeline approvals and the softwood lumber dispute with the United States. Some also mentioned a federal carbon tax.
- There was little awareness of how natural resource development proposals are reviewed and approved. Although most agreed that there is an evaluation process in place, few were able to explain it or felt sufficiently informed to judge whether or not it worked well or if it needed to be modified. If anything, participants assumed the process works well.

Values to guide Canada's energy future

- Participants were asked to rank the core values that they feel should guide Canada's energy future. The values that tended to be mostly highly ranked included "minimizing environmental impacts" as well as "keeping energy cheap and affordable." The values people chose could be grouped into two silos – those relating to safety and the environment (including climate change) and those that related more to jobs and affordability. The one value that crosses into both silos is "contributing to Canada's economy by growing the clean technology sector." As well, some felt the statement "minimizing environmental impacts" captured all the other statements that referred to protecting the environment in one way or another.

² Standards for the Conduct of Government of Canada Public Opinion Research -Telephone Surveys.
<https://www.tpsgc-pwgsc.gc.ca/rop-por/documents/telephone-eng.pdf>

- When participants were asked to consider potential trade-offs between affordability and the environment in Canada's energy future, many had difficulty understanding why these goals might conflict with one another. In general, there was a tendency to put a higher value on the environment, but many also expressed concern about increasing costs of energy.

Energy and the economy

- Most participants acknowledged that the energy sector is important to the Canadian economy. In fact, many tended to think that energy was a larger part of the Canadian economy than is actually the case.
- Many also felt that energy would be as large or a larger part of the economy in the future. Some said they believe that, as Canada develops new clean energy technologies, these would contribute to growth in the sector over time.
- Few participants felt that United States' demand for Canada's energy would decline in the future. Most agreed such an occurrence would pose a problem and that Canada should focus on diversifying market access.

Energy and the environment

- Most participants identified air and water pollution as the greatest overall environmental concerns related to energy, with many participants specifically mentioning environmental damage resulting from natural resource development and energy transportation spills. Some specifically mentioned the impact of fracking on water.
- Asked which was most concerning – the environmental impact of energy use or energy production – most felt these were so interrelated that it was difficult to differentiate between them. If forced to choose, most thought that energy production probably did more damage than the use of energy by individuals.
- Most participants felt that energy infrastructure in Canada was safe. A few participants suggested they were somewhat concerned that industry's investment in infrastructure maintenance and safeguards may be insufficient and that more could be done to ensure industry applies the highest standards.

Climate change

- While climate change was not a top of mind concern for most participants, a number felt Canada must nevertheless set an example and strive to lead on this issue. Others suggested Canada's greenhouse gas emissions are negligible; some wondered how much human activity contributes to climate change; and some questioned if anything can be done to limit climate change.
- Participants who felt Canada should be a leader on climate change described this role in terms of developing emissions-reducing strategies and technologies and sharing these with other countries. Other recommended strategies to address climate change tended to focus on regulation, incentives, increased use of clean energy, and reducing vehicle-related emissions.

- When asked to provide examples of clean energy, the most common mentions included wind, solar, hydro, geothermal, nuclear and tidal energy. Participants also mentioned electric cars in this context.
- Concerns about the risks associated with nuclear energy were pervasive. While there were very few doubts regarding its neutral impact on climate change, the potential for an accident, no matter how remote, left many reluctant to accept it entirely. Some could not see why other forms of clean energy such as solar and wind could not be prioritized instead.

Future energy use in transportation and buildings

- There was an expectation that Canada will gradually transition to more renewable forms of energy and that technological advances would improve energy efficiency. Participants in Vancouver were most confident renewable energy could effectively replace non-renewable sources within the next 20 years, partly because of the abundance of hydroelectricity in the province and their more moderate climate.
- Regarding transportation, participants foresaw better fuel efficiency vehicles and vehicles powered by electricity and other renewable fuels. Participants expect the proportion of people using personal vehicles will decline because of associated costs. Participants also foresaw more people teleworking, taking public transit and ride sharing. There is also an expectation that public transportation systems will grow and become increasingly efficient.
- Regarding homes and offices, most people expected there would be higher standards for buildings, that these will incorporate green technologies such as solar panels, certifications and higher energy efficiency standards. Participants also expected that households would increase their use of energy-efficient appliances and other technology improvements. A few suggested the innovations being developed by Tesla could be possible glimpses into what the future holds for household-level energy use and efficiency.

Key findings – Quantitative

Natural resource issues and government performance

- When asked to identify the single biggest natural resource issue in Canada, no single overarching issue occupies the public consciousness; oil and gas issues are top of mind (11%).
- Public opinion is divided about the Government of Canada's overall performance on managing Canada's natural resources: more than one third rate it favourably, while four in 10 are neutral and one quarter rate it unfavourably. Similarly, there is no consensus about the GC's performance on six specific areas related to natural resource management. It is notable that most ratings fall in the middle range rather than at either the positive or negative extremes, suggesting a lack of familiarity with GC efforts and thus less certainty in their opinions.

Energy industries and energy project awareness

- There is widespread recognition of the importance of Canada's energy industries to the overall economy (84%), a view that is most common in Alberta.

- Awareness of national and provincial energy projects varies across the country. The best known project is Muskrat Falls (97% of N.L. residents have heard at least something about it). Majorities are also aware of the Labrador-Island Transmission Link (71% in N.L.), Plan Nord (70% in Que.), Site C (65% in B.C.), PNW (58% in B.C.) and the Maritime Link (52% in N.L. and N.S.). Awareness is lowest for the 2017 NGTL System Expansion project (17% in Alta.) and the Chinook Power Station (19% in Sask.). In terms of the larger national projects, there is relatively good awareness of Energy East (62%), but much lower awareness of Trans Mountain (38%).

Energy development and future needs

- Canadians are most likely to support further development of renewable energy sources, including solar and wind, followed by hydro power. Majorities also support greater development of bioenergy, natural gas and oil. However, views are divided about nuclear power, with close to half who support and just over half who oppose it.
- Similarly, Canadians are most likely to expect future demand for renewable forms of energy (including solar, wind and bioenergy) to increase. There is no consensus about whether demand for oil and nuclear power will increase, decrease or remain the same.
- The top public concerns about energy are price and the environmental impact, at similar levels (roughly half say they are very concerned about each). By comparison, there is relatively less concern expressed about Canada's ability to transition to renewable energy (36%) or about a decline in American demand for Canadian energy exports (24%).
- When asked specifically about their single biggest environmental concern related to energy industries, no single overarching concern is raised, but climate change is top of mind (13%).

Interest in energy-efficient actions

- Canadians are generally optimistic that increased energy efficiency will happen in public, personal and industrial applications in the next 20 years, but only minorities express strong confidence that this will happen. Similarly, there is broad interest in buying an electric vehicle but only one third (32%) are very interested. However, homeowners express considerable interest in buying energy-efficient appliances (63% very interested) and upgrading insulation, windows and doors (58%) – although other research conducted by Environics suggests this is just as much for the cost savings as for the environmental benefits.

Political neutrality statement

I hereby certify as senior officer of Environics that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

The contract value for this research project was \$157,325.38, including HST.



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Introduction

Canada is one of the world's leading producers of natural resources and is also one of the highest per capita users of energy. Consequently, the importance of natural resources to this country cannot be overstated. The priorities of the Government of Canada, and of Natural Resources Canada in particular, are as follows:

- To invest in clean energy technology delivering benefits for the environment and the economy, including jobs.
- To regain public trust through appropriate regulatory oversight, credible environmental assessments and respect for the rights of those most affected by resource-based projects.
- To take national leadership on climate change by protecting the environment and growing the economy.

Natural Resources Canada last conducted comprehensive public opinion research on natural resource issues in the fall of 2016. Updated research is now required to address new areas of enquiry that will inform program and policy development for natural resources or in relation to Government of Canada and ministerial priorities identified above.

Research rationale and objectives

This research was conducted to assess, through qualitative and quantitative means, Canadian public opinion on a wide-range of natural resource issues related to forests, mining, energy (including energy efficiency), clean technology, climate change, government science and public confidence in major project management.

The results will serve to inform the Government of Canada of the opinions and perceptions of Canadians on key resource issues and will ensure that departmental plans, policies and communications are responsive to the needs of the public.

Report

This report begins with an executive summary outlining key findings and conclusions, followed by detailed analysis of the qualitative results and survey data. Provided under a separate cover is a detailed set of “banner tables” presenting the results for all survey questions by population segments as defined by region and demographics. These tables are referenced by the survey question in the detailed analysis.

In this report, quantitative results are expressed as percentages unless otherwise noted. Results may not add to 100% because of rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the charts because of rounding.

I. Detailed qualitative findings

A. General attitudes toward natural resources

At the beginning of each focus group, participants were asked to list words that came to mind when they thought about Canada's natural resources.

- **Forests, wood, timber and trees** were collectively one of the most common themes listed, with the logging and forestry industries being mentioned as related industries.
- **Oil, gas and natural gas** were also commonly noted.
- Many participants also thought of **water**.
- **Mining** as an industry was noted in every city, with specific references to minerals, coal, uranium, gold, metal and precious metals surfacing across the sessions.
- A couple of participants in each session would refer to **renewable resources** in general or to a specific form of renewable energy, with wind coming out the most.
- Some participants also tended to describe Canada's natural resources as "vast" or "plentiful."

B. Role of the federal government

When asked what role the federal government has or should have in relation to natural resources, participants most often suggested it is primarily to regulate industry and provide environmental protection, though a couple of participants noted that the provinces also have roles in these areas. Mentions of specific environmental protections included protecting water, forests and ecosystems and preventing over-exploitation of resources.

Other, less noted roles included ensuring resource projects provide an economic benefit to Canada, creating and protecting jobs in the natural resource sector, and leading international trade negotiations. A few participants suggested the federal government's role would include monitoring resource projects for compliance throughout their life cycle.

Most participants struggled to spontaneously list any recent action taken by the federal government that related to natural resources. To the extent that people were aware of anything, they tended to mention recent pipeline approvals and the softwood lumber dispute with the United States. There was also some mention of a federal carbon tax.

When specifically prompted on the softwood lumber dispute with the United States, about half of the participants said they had heard about the dispute. Those who were aware of it had some vague knowledge that it was connected to the United States claiming Canada was unfairly subsidizing lumber. There was little consensus on what Canada ought to do on this issue with a range of suggestions including appealing to trade tribunals, holding firm, retaliating and seeking new markets for our lumber.

The importance of the softwood lumber industry to Canada overall and to local economies surfaced in a number of sessions. There is an appreciation that the sector employs many Canadians and that it supports many other local businesses.

There was little awareness of how natural resource development proposals are reviewed and approved. Although most agreed that there is an evaluation process in place, few were able to explain it or felt sufficiently

informed to judge whether or not it worked well or if it needed to be modified. If anything, participants assumed the process works well. A few participants suggested there are opportunities to improve the assessment of resource projects including ensuring transparency, autonomy from industry and other groups, and improved opportunities for citizens, especially those directly affected by resource development, to provide feedback.

C. Values to guide Canada's energy future

Participants were asked to rank the core values that they feel should guide Canada's energy future. The values that tended to be most highly ranked included "minimizing environmental impacts" as well as "keeping energy cheap and affordable." Values people chose could be grouped into two silos – those relating to safety and the environment (including climate change) and those that related more to jobs and affordability. The one value that crosses into both silos is "contributing to Canada's economy by growing the clean technology sector." As well, some felt the statement "minimizing environmental impacts" captured all the other statements that referred to protecting the environment in one way or another.

The following table summarizes how participants interpreted and reacted to each "core value" and how these perceptions varied across regions.

Values that resonated the most	
A. <i>Minimizing environmental impacts</i>	Many participants interpreted this statement to mean environmental protection and preservation for future generations and appreciating that a compromised environment affects our quality of life. A few also saw an economic connection in avoiding long-term expenses to fix damages done. Regionally: This resonated the most in Vancouver.
B. <i>Keeping energy cheap and affordable</i>	Some participants said they felt that oil is expensive and energy is overtaxed. Seen as "essential" by many, these respondents felt energy should be affordable. A few also saw affordability as an important competitive factor to attract and retain industry. Regionally: This resonated most in Toronto and St. John's and somewhat less in Calgary and Vancouver.
Values that resonated moderately	
C. <i>Ensuring energy is available and reliable</i>	Some participants felt energy is often taken for granted but is vital given the extent to which daily life depends on it. Regionally: Far fewer participants in Montréal identified this as an important value.
D. <i>Generating jobs</i>	A number of participants perceive the energy sector as an important employer. A few realize that it also creates jobs beyond energy-intensive regions of the country. Regionally: This was an important value in St. John's, a moderate priority in most of the other regions and a low priority in Vancouver.
E. <i>Ensuring energy is produced, transported and used safely</i>	Participants identified this as a moderate value generally, though some suggested this value fell within the "minimizing environmental impacts" value statement. Most who identified this as an important value related it to the safe transportation of oil.

	Regionally: This especially resonated in St. John's and Vancouver and was the weakest in Toronto.
<i>F. Addressing climate change by reducing greenhouse gas emissions</i>	Some participants regarded this value as encompassed within the "minimizing environmental impacts" value. Regionally: This resonated the most in Montréal and Vancouver.
<i>G. Contributing to Canada's economy by growing the clean technology sector</i>	Some interpreted this value as relating to the importance of developing or making available cleaner energy alternatives. Some also saw the values in this statement reflected in the "minimizing environmental impacts" value. Regionally: Fewer participants in Toronto identified this as an important value.
Value that resonated the least	
<i>H. Contributing to Canada's economy by getting our natural resources to market</i>	While many appreciate the importance of getting resources to market, fewer identified this as a top priority in comparison to the others presented. Regionally: More participants in Calgary and fewer in Toronto and St. John's chose this value as a priority.

When participants were asked to consider potential trade-offs between affordability and the environment in Canada's energy future, many had difficulty understanding why these goals might conflict with one another. In general, there was a tendency to put a higher value on the environment, but many also expressed concern about increasing costs of energy. Some of the themes and ideas that surfaced from this debate included:

- While some participants expressed concern that "cheap" energy sources are often detrimental to the environment, clean sources were generally perceived as more expensive. A number of participants said energy is a necessity in Canada's climate and that affordability must remain part of the overall equation.
- Some participants suggested clean energy technology research would be expensive in the short-term, but felt that it would prove a worthwhile investment in the long run.
- Some participants felt that, despite Canadians' efforts to become more energy-efficient, many take their energy for granted and suggest there is still room for improvement.
- A few participants were prepared to pay more for energy if they are reassured that the source they are consuming is better for the environment.

D. Energy and the economy

Most participants acknowledged that the energy sector is important to the Canadian economy. In fact, many participants tended to think that energy was a larger part of the Canadian economy than is actually the case.

Many participants also felt that energy would be as large or a larger part of the economy in the future. Some believed that, as Canada develops new clean energy technologies, these would contribute to growth in the sector over time. There were some participants who felt the development of more renewable and cost-efficient forms of energy might cause the sector to shrink over time, while still remaining central to the success of the economy.

Participants were asked to explain what, if anything, concerns them most when it comes to energy in Canada. Many participants were concerned with affordability, whereas participants in Calgary raised concerns about being able to get Canada's resources to market, with pipelines typically at the centre of this concern. Other concerns related to a perceived lack of a long-term plan to preserve resources for future generations. A few participants were specifically concerned with the perception that Canada has an abundance of resources and that this may compel some people to postpone the need to focus on renewable energy sources.

Few participants felt that United States' demand for Canada's energy would decline in the future. Most participants agreed such an occurrence would pose a problem and that Canada should focus on diversifying market access. Some participants felt Canada could also make more use of Canada's energy domestically.

Most participants tended to demonstrate little concern about the current cost of energy today, though a few were concerned prices would rise in the future. Many participants see energy as a necessity, and therefore, participants felt it must be affordable.

E. Energy and the environment

Most participants identified air and water pollution as the greatest overall environmental concerns related to energy, with many specifically mentioning environmental damage resulting from natural resource development and energy transportation spills. Some specifically mentioned the impact of fracking on water.

Other noteworthy concerns included the following:

- Many participants across all groups, most notably in Montréal, expressed concerns with energy transportation spills, with Lac Mégantic mentioned as an example.
- Participants in Vancouver and a few in other provinces noted the impact of energy development on wildlife habitat.
- Mentions of climate change were often linked to the energy industry.

Asked which was most concerning – the environmental impact of energy use or energy production – most participants felt these were so interrelated that it was difficult to differentiate between them. If forced to choose, most thought that energy production probably did more damage than the use of energy.

Most participants felt energy infrastructure in Canada is safe. Some participants were somewhat concerned that industry's investment in infrastructure maintenance and safeguards may be insufficient and that more could be done to ensure industry applies the highest standards. This sentiment was expressed most often in Montréal.

F. Climate change

While climate change was not a top of mind concern for most participants, a number felt Canada must nevertheless set an example and strive to lead on this issue. Other participants suggested Canada's greenhouse gas emissions are negligible; some wondered how much human activity contributes to climate change; and some questioned if anything can be done to limit climate change. A few participants had little understanding of climate change, erroneously identifying nuclear accidents, oil spills or waste/lack of recycling as contributors to climate change.

Participants who felt Canada should be a leader on climate change described this role in terms of developing emissions reduction strategies and technologies and sharing these with other countries. Other recommended strategies tended to focus on regulation, incentives, increased use of clean energy and reducing vehicle-related emissions.

When participants provided examples of clean energy, the most common mentions included wind, solar, hydro, geothermal, nuclear and tidal energy. Participants also mentioned electric cars in this context.

Many participants seemed to be aware that nuclear energy does not produce greenhouse gas emissions, though almost as many seemed unsure. Attitudes toward increasing nuclear energy capacity in Canada to meet emissions targets were mixed. Many participants initially recoiled at the mention of nuclear, with some focussing on major incidents such as Fukushima and Chernobyl. Medical applications of nuclear technologies provided perspective for some participants. A number admitted lacking information on this energy source, and there was some curiosity about whether it could serve as a viable low-carbon solution.

In the end, underlying concerns about the risks associated with nuclear energy were pervasive. While there were very few doubts regarding its neutral impact on climate change, the potential for an accident, no matter how remote, left many reluctant to accept it entirely. Some could not see why other forms of clean energy such as solar and wind could not be prioritized instead.

G. Future energy use in transportation and buildings

There was an expectation that Canada will gradually transition to more renewable forms of energy and that technological advances would improve energy efficiency. Participants in Vancouver were most confident that renewable energy could effectively replace non-renewable sources within the next 20 years, partly because of the abundance of hydroelectricity in the province and their more moderate climate.

Regarding transportation, participants foresaw better fuel efficiency vehicles and vehicles powered by electricity and other renewable fuels. Participants expect the proportion of people using personal vehicles will decline because of associated costs. Participants also foresaw more people teleworking, taking public transit and ride sharing. There is also an expectation that public transportation systems will grow and become increasingly efficient.

Regarding homes and offices, most people expected there would be higher standards for buildings – that these will incorporate green technologies such as solar panels, certifications and higher energy efficiency standards. Participants also expected that households would increase their use of energy-efficient appliances and other technology improvements. A few suggested the innovations being developed by Tesla could be possible glimpses into what the future holds for household-level energy use and efficiency.

II. Detailed quantitative findings

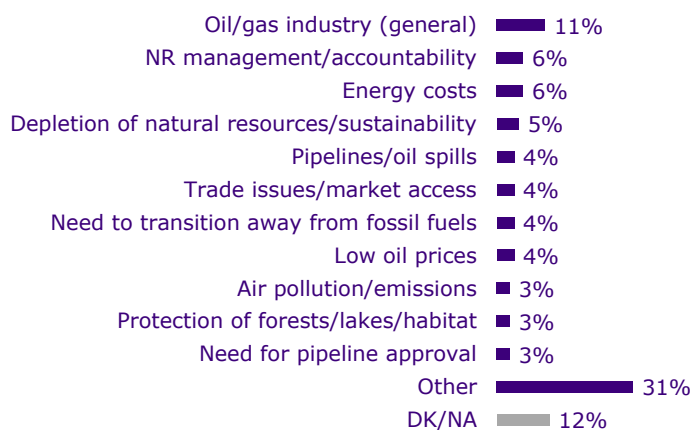
A. Natural resource issues and government performance

1. Natural resource issues

There is no overarching natural resource issue occupying the public consciousness; oil/gas issues are mentioned most often.

Canadians were asked to indicate, without prompting, what they would say is the single biggest issue the country faces when it comes to natural resources. There is no consensus about the top issue; rather, small proportions cite a wide variety of concerns. The top mentions relate to the oil and gas industry; fewer than one in 10 each mention management of resources, energy costs, sustainability and other issues.

Biggest natural resource issue (Top mentions – 3% or more)



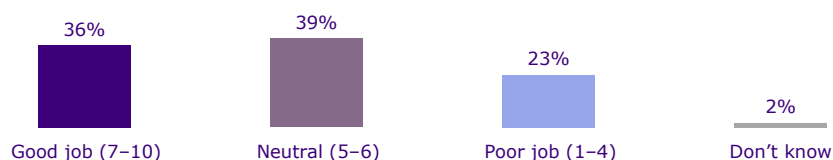
Q1 What would you say is the single biggest issue Canada faces when it comes to our natural resources?

2. Government of Canada performance on natural resource management

Canadians rate the Government of Canada's management of Canada's natural resources more favourably than unfavourably.

When asked to rate the overall performance of the Government of Canada in terms of managing Canada's natural resources, just over a third say it is doing a good job (giving a rating of seven or more on a 10-point scale) and four in 10 are neutral (rating of 5 or 6); around one quarter give a lower rating (a rating between one and four).

GC performance on natural resource management



Q2 How would you rate the overall performance of the Government of Canada in terms of managing Canada's natural resources? Use a 10-point scale where "1" means a very poor job and 10 means a very good job.

Positive ratings (i.e., rating of 7–10) on the natural resources management range from a low of 19% in Alberta to a high of 42% in Quebec. Close to half of the participants in Alberta (46%) rate the government performance as poor, notably different from the rest of the country. Positive ratings are equally likely among men and women, but higher among younger Canadians (42% aged 18–34, vs. 34% of their older counterparts), those with household incomes under \$40,000 (43%), francophones (41%) and allophones (57%).

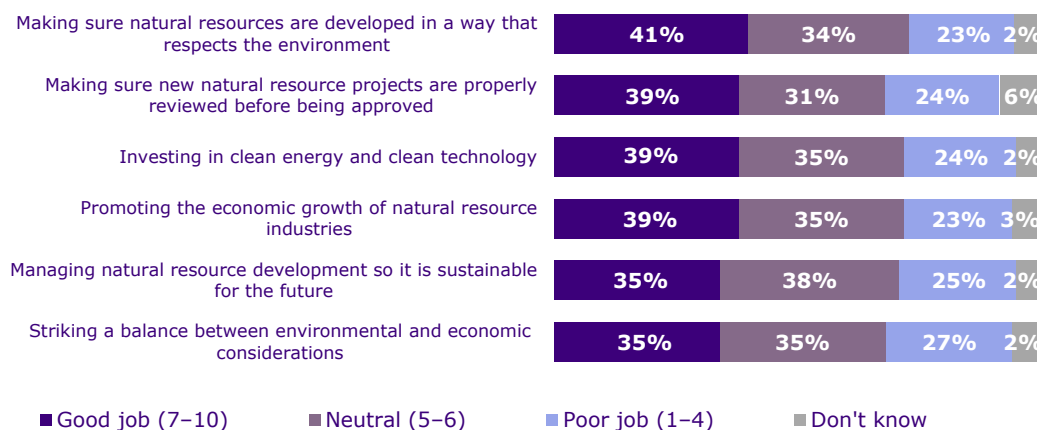
3. Government of Canada performance on specific elements of natural resource management

Canadians are more likely to approve than disapprove of the government's performance on specific areas of natural resource management, although relatively few have firm opinions one way or the other.

Between one third to four in 10 Canadians express approval of the job the federal government is doing in each of six specific natural resource areas. Around one third each give a neutral (5–6) rating, and one quarter say it is doing a poor job on each file. Ratings are generally similar regardless of the topic area, but slightly lower on sustainability and striking an economic/environmental balance.

It should be noted that majorities of around six in 10 of Canadians give ratings that are in the broader neutral range (4–7), suggesting they may not be familiar with the specific actions being taken nor have formed opinions and thus are giving a non-committal rating.

GC performance on specific elements of natural resource management



Q3 When it comes to Canada's natural resources, how would you rate the performance of the Government of Canada in each of the following areas? Use a 10-point scale where "1" means a very poor job and 10 means a very good job.

Quebecers, Canadians aged 18–24 years, those with an annual income under \$40,000 and allophones are more likely than others to rate the GC favourably on all performance elements tested.

Manitobans and small rural areas are generally less likely to provide positive ratings on the performance elements tested. Albertans are significantly less likely than other Canadians to give the GC positive ratings for promoting economic growth, sustainable resource development management, and clean energy investment.

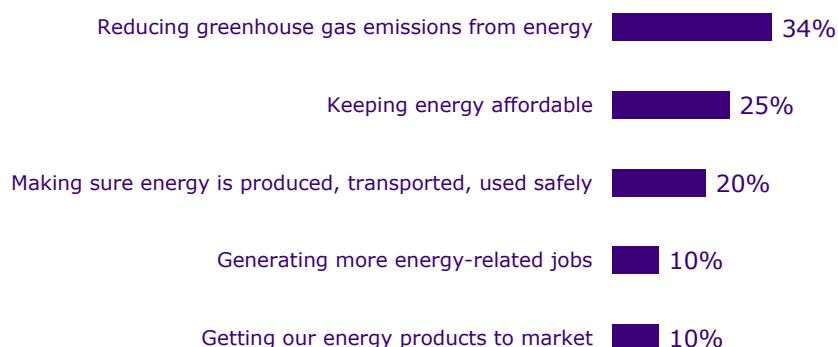
B. Energy industries and project awareness

1. Desired guiding principles for Canada's energy future

There is no public consensus about what should guide future decisions about energy in Canada. Reducing greenhouse gas emissions from energy is chosen as the top guiding principle by one third of Canadians, followed closely by keeping energy affordable.

Of five possible guiding principles for decisions about Canada's energy future, Canadians are most likely to say the focus should be the reduction of greenhouse gas emissions from energy (34%); keeping energy affordable is a close second choice (25%). Two in 10 participants think the main factor to consider should be safety, while the least popular choices are focusing on jobs or getting energy products to market (10% each).

Desired guiding principles for Canada's energy future



Q4 I now want to focus more specifically on Canada's energy industries. Which one of the following do you think should most guide decisions about Canada's energy future?

Greenhouse gas emission reduction is the top response in almost all regions, Alberta (13%) being the exception, and is notably higher in Quebec (45%) and the territories (39%) than elsewhere.

Almost equal preference for greenhouse gas emissions reduction and energy affordability is evident in Ontario (34% vs. 31%) and Atlantic Canada (32% vs. 28%). Albertans are most likely to want to focus on getting energy products to market (29%), while British Columbia residents are more likely than other Canadians to want the focus to be on safe energy production, transport and use (30%).

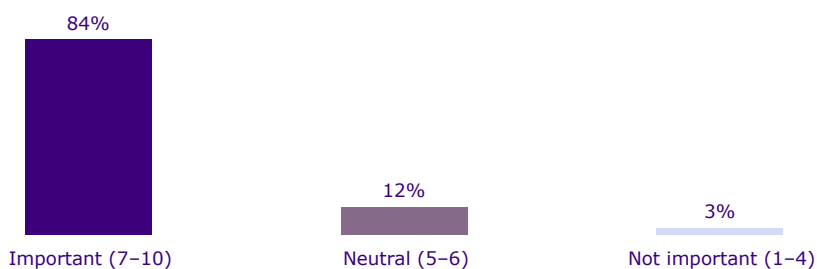
There are some notable demographic differences as well. Women are more likely than men to want decisions based on greenhouse gas reduction (37% vs. 31%) or safety (23% vs. 17%). Preference for focus on greenhouse gas reduction is also higher among Canadians under the age of 35 (38%) and increases with education – from 30% for those with high school or less to 41% for university graduates. Although secondary to the other choices, focus on getting product to market is higher among those in the highest household income bracket – 17% with incomes of \$150,000 or more.

2. Importance of energy industries to the economy

There is widespread recognition of the importance of the country's energy industries to the overall economy, although this is particularly high in Alberta.

More than eight in 10 Canadians (84%) acknowledge that the country's energy industries are important to the national economy; one quarter (27%) rate this as 10 out of 10 in importance, including close to half of Albertans (45%). Quebecers are the least likely to say energy industries are important to the economy, but still, three quarters (75%) give a rating of 7 to 10.

Importance of energy industries to the economy



Q5 How important would you say Canada's energy industries are to Canada's economy, using a 10-point scale where 1 means not important at all and 10 means extremely important?

Eight in 10 or more in almost every demographic segment of the population rate energy industries as important to the national economy (i.e., 7–10 out of 10) with the exception of Quebec (76%). The view that it is extremely important (i.e., rating 10 out of 10) is higher among allophones (38%), those with a household income of \$40,000 or less (33%) and those with a high school education or less (32%).

3. Awareness of national energy projects

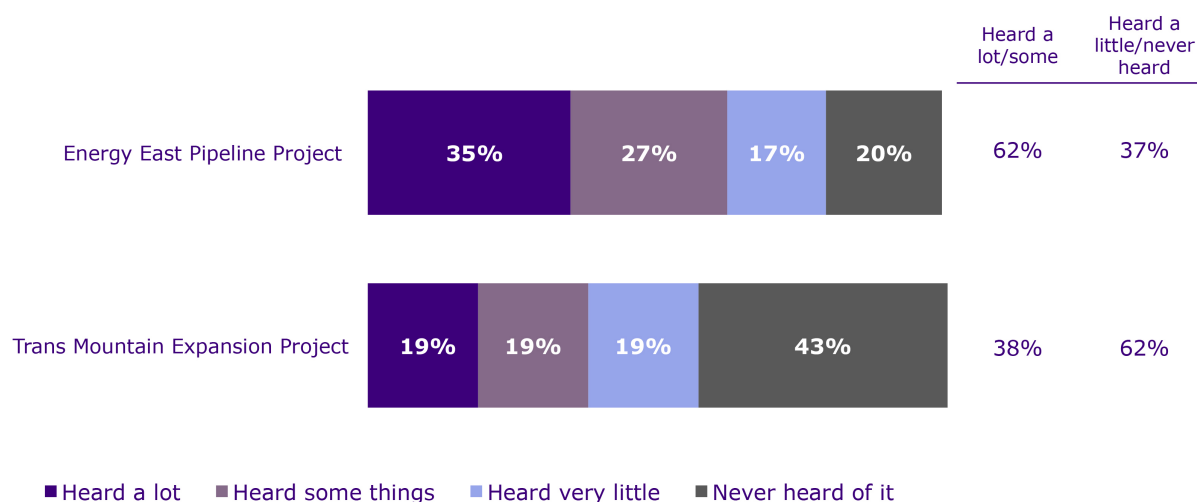
Six in 10 are at least broadly familiar with the Energy East Pipeline Project, while only four in 10 say the same of the Trans Mountain Expansion Project.

Although Canadians believe energy industries are important to the national economy, awareness of specific projects by their official names is relatively low.

Of the two national projects asked about in the survey, awareness is highest for the Energy East Pipeline Project, with 62% hearing at least something and 35% saying they have heard a lot about it. Hearing a lot about this project is higher in the Atlantic provinces (43%), Quebec (47%) and Alberta (49%).

By comparison, 38% have heard at least something about the Trans Mountain Expansion. Strong familiarity is concentrated in the west with 49% in British Columbia and 43% in Alberta versus 5% in Quebec. More than four in 10 (43%) say they have never heard of the Trans Mountain Expansion Project.

Awareness of national energy projects



Q6. For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

Awareness (i.e., hear a lot or some things) of both of these major energy projects increases with age as well as with level of education, household income and community size.

Allophones are least likely to express awareness of both projects. Those who identify French as the language spoken at home are significantly more likely to say they are aware of the Energy East Pipeline Project (67% vs. 62% of English speakers) and less likely to be aware of the Trans Mountain Expansion Project (22% vs. 38% of English speakers).

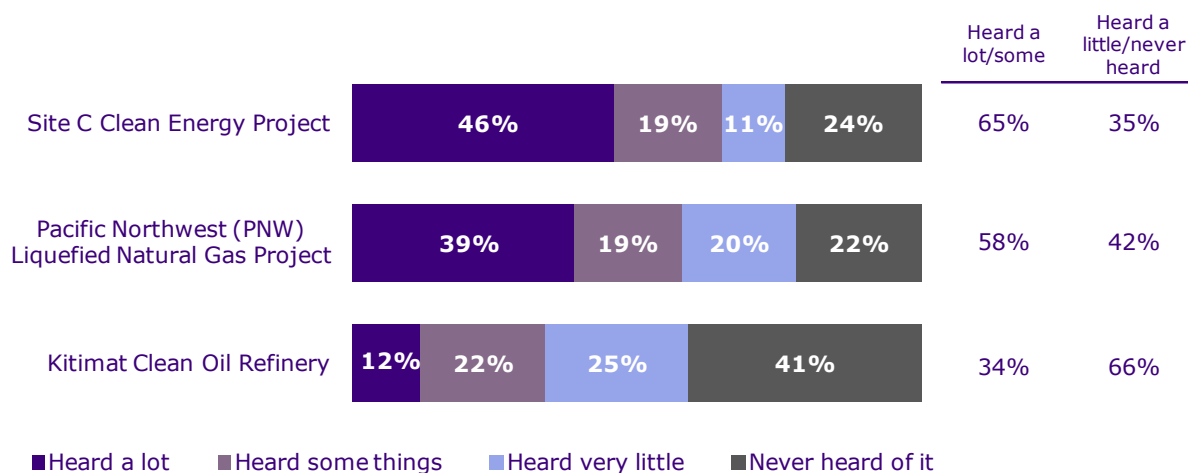
4. Awareness of regional energy projects

a) British Columbia

Majorities of B.C. residents have heard about Site C and Pacific Northwest; only a minority are similarly aware of Kitimat.

In British Columbia, awareness is highest for the Site C project (65% hear a lot or some things), followed closely by Pacific Northwest project (58%); Kitimat is by far the least known of these provincial projects (34%).

Awareness of British Columbia projects
(Subsample: B.C. residents n=205)



Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

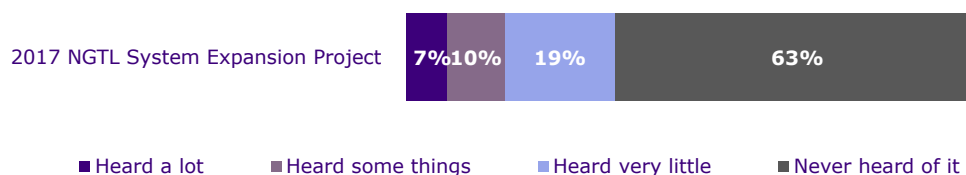
Awareness of all three B.C. energy projects increases with age, education and household income levels.

b) Alberta

One in six Alberta residents have heard about the NGTL System Expansion Project by that name.

In Alberta, awareness of the NGTL expansion in Alberta is low, with only 17% having heard a lot or something; more than six in 10 (63%) have never heard of it. Awareness increases with age and is more common among men.

Awareness of NGTL project
(Subsample: Alberta residents n=181)



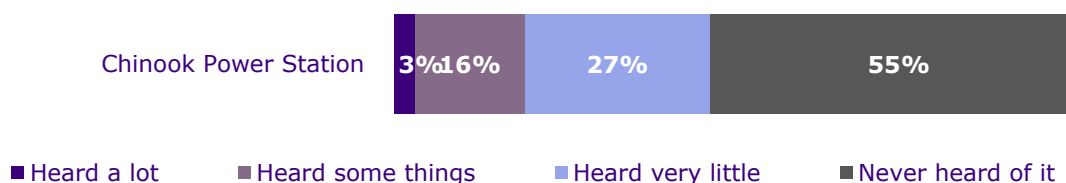
Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

c) Saskatchewan

A minority of one in five residents have heard at least some things about the Chinook Power Station project in Saskatchewan.

One in five (19%) Saskatchewan residents have heard at least some things about the Chinook Power Station project; the majority (55%) have never heard of it.

Awareness of Chinook Power Station project
(Subsample: Saskatchewan residents n=116)



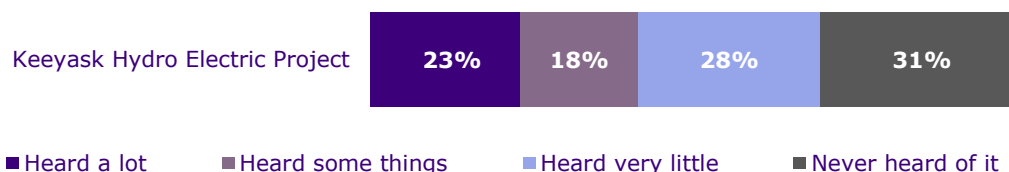
Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

d) Manitoba

Four in 10 Manitoba residents say they have heard at least some things about the Keeyask Hydro Electric.

Four in 10 (41%) Manitobans have heard at least something about the Keeyask Hydro Electric project, while 31% have never heard of it.

Awareness of Keeyask Hydro Electric Project
(Subsample: Manitoba residents n=84)



Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

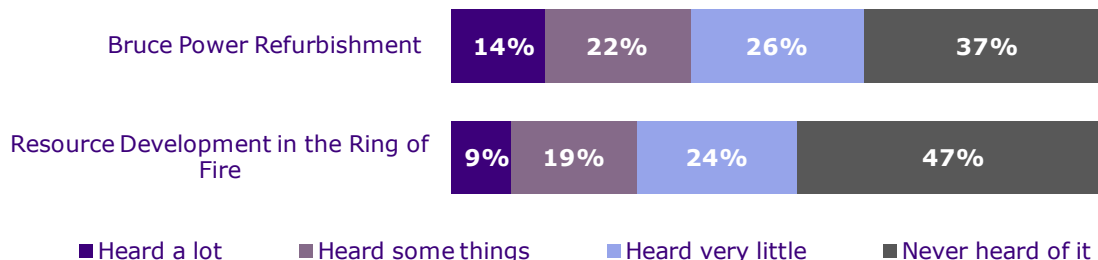
e) Ontario

Minorities of Ontario residents are aware of the Bruce Power and Ring of Fire projects in their province.

Awareness is generally low for energy projects in Ontario. One third (36%) of Ontario residents have heard at least something about the Bruce Power project, while fewer (28%) have heard of resource development in the Ring of Fire. More men (42%) than women (30%) are aware of the Bruce Power project.

Awareness of Ontario projects

(Subsample: Ontario residents n=605)



Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

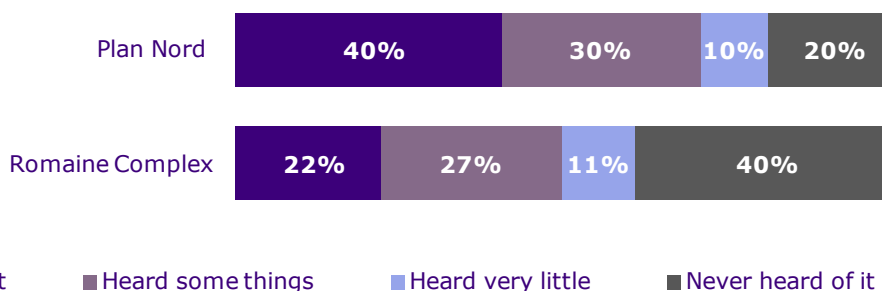
f) Quebec

Seven in 10 are aware of Plan Nord in Quebec; half are aware of the Romaine Complex project.

Of the two energy projects in their province, seven in 10 (70%) Quebecers have heard at least something about Plan Nord, while half (49%) have heard about the Romaine Complex. Awareness of both projects is significantly higher among francophones than anglophones in Quebec. Canadians aged 18 to 34 and those with household incomes of less than \$40,000 a year are significantly less likely to have heard of either project.

Awareness of Quebec projects

(Subsample: Quebec residents n=427)



Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

g) Atlantic provinces

Awareness of energy projects in Newfoundland and Labrador and Nova Scotia is strong.

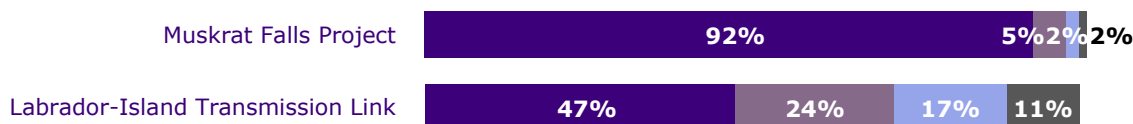
Almost all Newfoundland and Labradorians have heard at least something about the Muskrat Falls project, including nine in 10 (92%) who have heard a lot. Seven in 10 (71%) are aware of the Labrador-Island Transmission Link.

Half (52%) of Newfoundland and Labrador and Nova Scotia residents express some level of awareness about the Maritime Link project. The proportion who have heard a lot is higher among Newfoundland and Labradorians (44%) than Nova Scotians (27%). Those with higher levels of education and household income are more likely to say they are aware. Awareness also increases with age.

Awareness of Atlantic projects

(Subsamples: Newfoundland and Labrador residents n=72; Newfoundland and Labrador and Nova Scotia residents n=259)

Newfoundland and Labrador



Newfoundland and Labrador/Nova Scotia



■ Heard a lot ■ Heard some things ■ Heard very little ■ Never heard of it

Q6 For each of the following, would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it?

C. Energy development and future needs

1. Support for forms of energy development

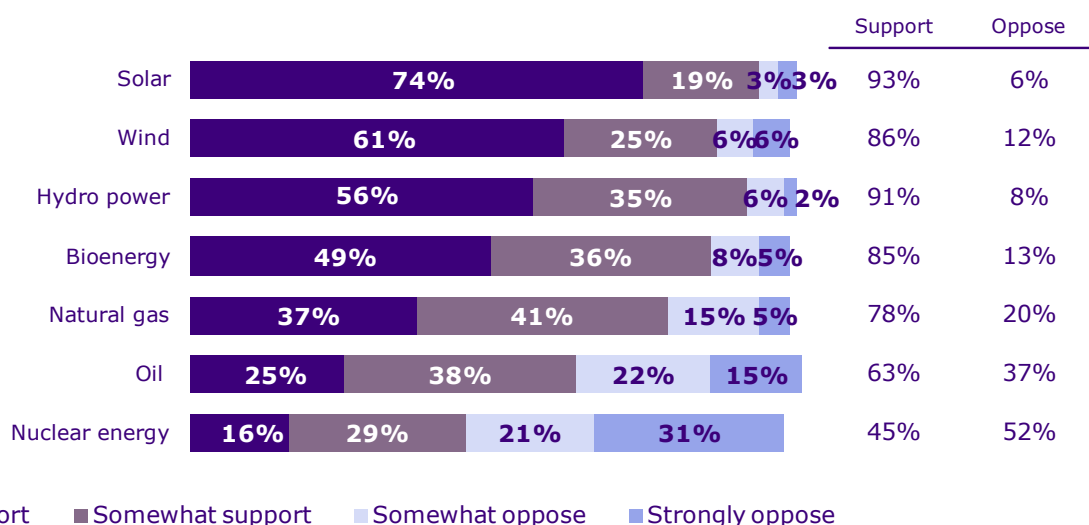
Canadians are most likely to support development of solar and wind energy and are most divided in their views about nuclear power.

From a list of six energy sources, Canadians support the increased development of solar power (94%), hydroelectric (91%) and wind power (86%).

There is also widespread support for the development of bioenergy sources (85%), although only half (49%) strongly support it, which may be because of lower familiarity with what it entails. Support for further natural gas (78%) and oil (63%) development also outweigh opposition (20% and 37%, respectively).

The public is most divided about nuclear energy – just under half (45%) support it, compared to just over half (52%) who oppose it.

Support for forms of energy development



Q7 Do you strongly support, somewhat support, somewhat oppose or strongly oppose more development of each of the following forms of energy in Canada?

Residents of Manitoba and Saskatchewan and allophones are more likely than others to strongly support both renewable and non-renewable energy sources. Quebecers are less likely than others to strongly support all of these forms of energy; in particular, they are least likely to strongly support nuclear energy (4%).

Atlantic Canadians and those living in the territories are more likely than others to express strong support for solar (85% and 82%, respectively) and wind (81% and 66%, respectively) energy.

Compared to Canadians over the age of 35, Canadians aged 18–34 are more likely to strongly support solar (79%) and wind (77%) energy and less likely to strongly support oil (18%) and natural gas (30%).

Albertans, men, those with household incomes over \$150,000 and those aged 55 years and over are more likely than others to strongly support oil, natural gas and nuclear.

Ontarians are more likely than others to strongly support natural gas (43%) and nuclear (23%) energy.

Albertans and those 55 years of age and over are significantly *less* likely to strongly support wind (53% and 52%, respectively) and solar (67% and 68%, respectively) energy.

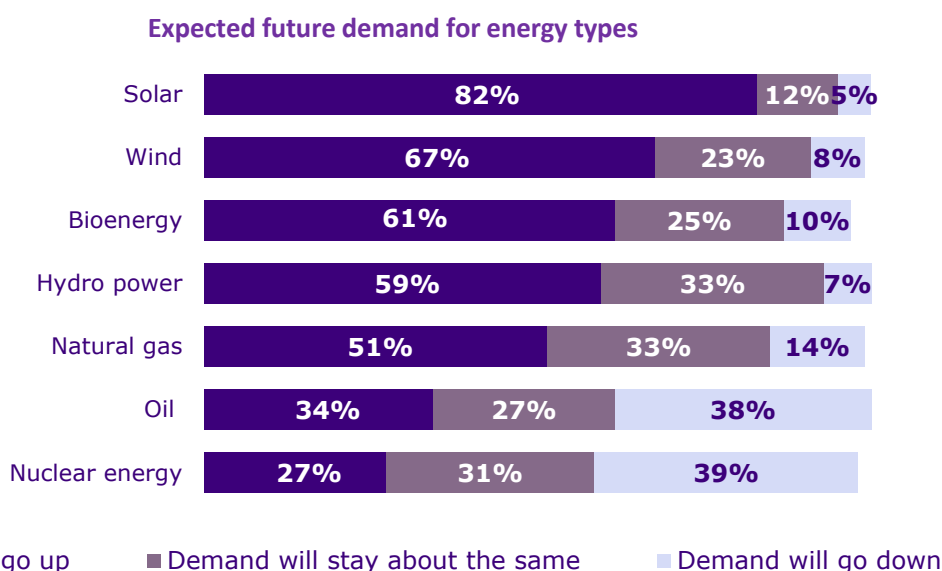
Rural residents are more likely than others to strongly support oil (31%) and natural gas (42%), but less likely to strongly support solar (66%) and bioenergy (44%).

2. Expected future demand for energy types

Most Canadians expect demand for renewable forms of energy to go up; there is no consensus about whether demand for oil and nuclear power will increase, decrease or stay the same.

The types of energy Canadians feel will see increased future demand closely replicate the types they supported for increased development. A majority expect demand for solar energy (82%) will go up, followed by wind (67%). Six in 10 expect increased demand for bioenergy (61%) and hydro power (59%) and half think natural gas (51%) demand will go up.

Canadians are divided in their views about whether demand for oil will go down (38%) or up (34%) and a quarter think it will stay about the same (27%). Canadians are most likely to think nuclear energy demand will drop (39%), but substantial minorities also think it could go up (27%) or stay the same (31%).



Q8 Looking ahead to the future, do you think demand in Canada for each of the following forms of energy will go up, go down or stay about the same as now?

Canadians in the Atlantic provinces and in the territories are more likely to say demand for **solar** (88% and 91%, respectively) and **wind** (83% and 74%, respectively) will go up. Higher income earners (\$100,000 or more) and francophones are more likely to think demand for **bioenergy** (66%) will go up.

Albertans (64%) and British Columbians (57%) are more likely than others to believe demand for **natural gas** will go up, while those in Manitoba and Saskatchewan (46%) and Quebec (42%) and 18–34 year olds (46%) are less likely to believe so.

While Albertans (58%) and those with a high school diploma or less (40%) are more likely to believe demand for **oil** will go up, Quebecers (23%) are less optimistic.

Canadians in British Columbia (68%), the Atlantic provinces (67%) and Manitoba and Saskatchewan (64%), as well as men (64%) are all more likely to foresee **hydro power** demand increasing. Significantly fewer Albertans (49%) see demand for this resource going up.

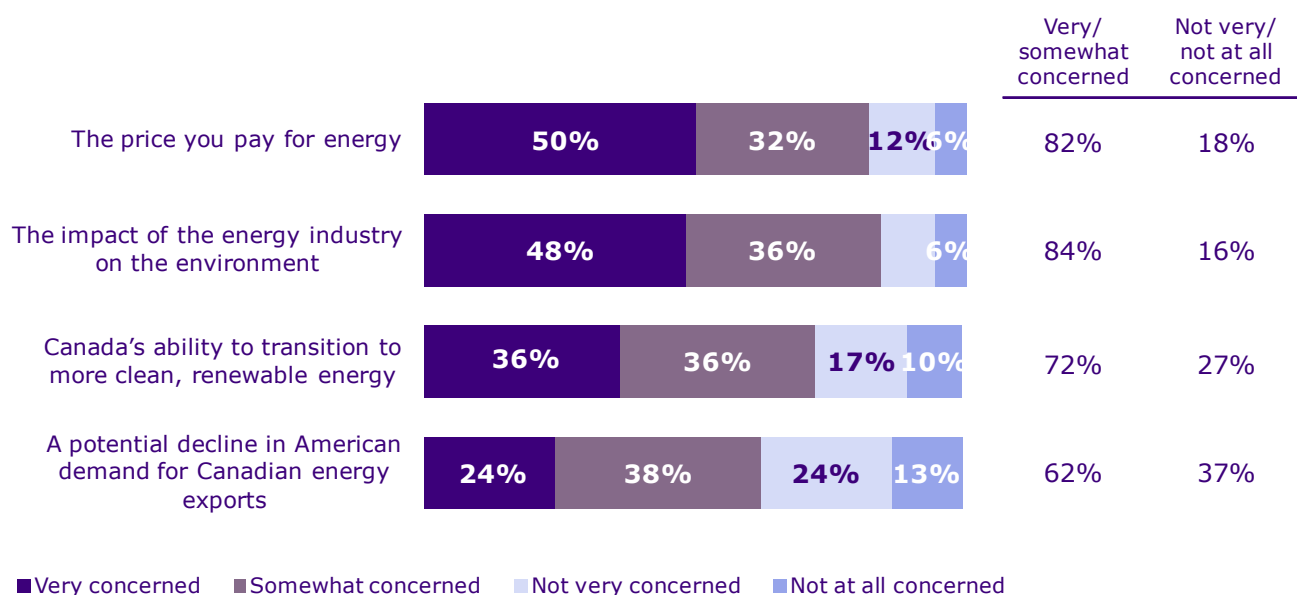
While still a minority, allophones (42%) are most likely to believe demand for **nuclear** energy will go up. Those in Ontario (36%) and Manitoba and Saskatchewan (32%) are also more likely than those in other regions to say demand for nuclear energy will go up, while those living in Atlantic Canada (22%) and Quebec (12%) are significantly less likely to say the same.

3. Concern about energy issues

Price and environmental impact are the top energy concerns.

When asked to rate their level of concern about four energy issues, Canadians are most likely to express concern about the price they pay for energy (50% very concerned) and the impact of the industry on the environment (48%). By comparison, just over one third express strong concern about the ability to make the transition to cleaner renewables, and one quarter worry to the same extent about a decline in American demand for Canadian energy exports.

Concerns about energy issues



Q9 Thinking about energy issues in Canada today, would you say you are very, somewhat, not very or not at all concerned about each of the following?

Ontarians and those living in Atlantic Canada are more likely than others to be very concerned about the price they pay for energy (65% and 61%, respectively).

British Columbians and those living in Atlantic Canada, the territories and Ontario are significantly more concerned about the impact of the energy industry on the environment and Canada's ability to transition to more clean, renewable energy. Conversely, Albertans are significantly less concerned about these issues.

Albertans are more concerned than others about a potential decline in American demand for Canadian energy exports (42%).

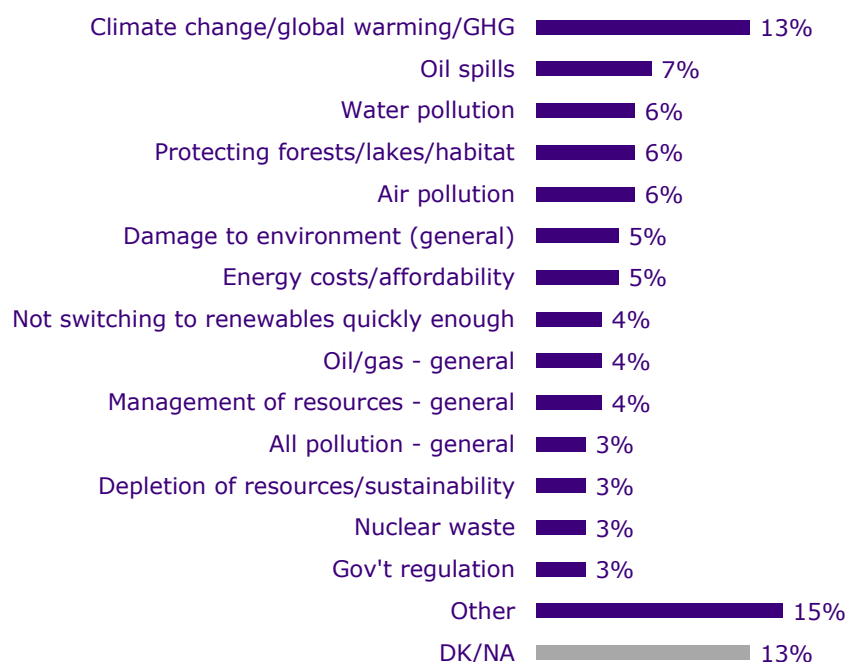
Allophones express the most concern with all issues tested with Quebecers expressing the least concern.

4. Biggest environmental concern about energy

Climate change is the top energy-related environmental concern, followed by a wide range of other issues including oil spills, water pollution, natural habitat protection and air pollution.

Canadians express no single overarching concern related to energy industries, but the most frequently mentioned are climate change and greenhouse gas emissions (13%), followed by a wide range of issues, each cited by fewer than one in 10, including oil spills, water pollution, the protection of forests and habitat, and air pollution.

Single biggest environmental concern about energy (Top mentions - 3% or more)



Q10 What would you say is your single biggest environmental concern when it comes to Canada's energy industries?

Responses are generally similar by region and demographic subgroups. Mentions of oil spills are higher in B.C. (15%); energy costs are more frequently mentioned in Ontario (8%), and protecting habitat is of slightly more concern to younger people (10% among those age 18–34). Climate change is more widely mentioned by Canadians with university education (18%).

D. Interest in energy-efficient actions

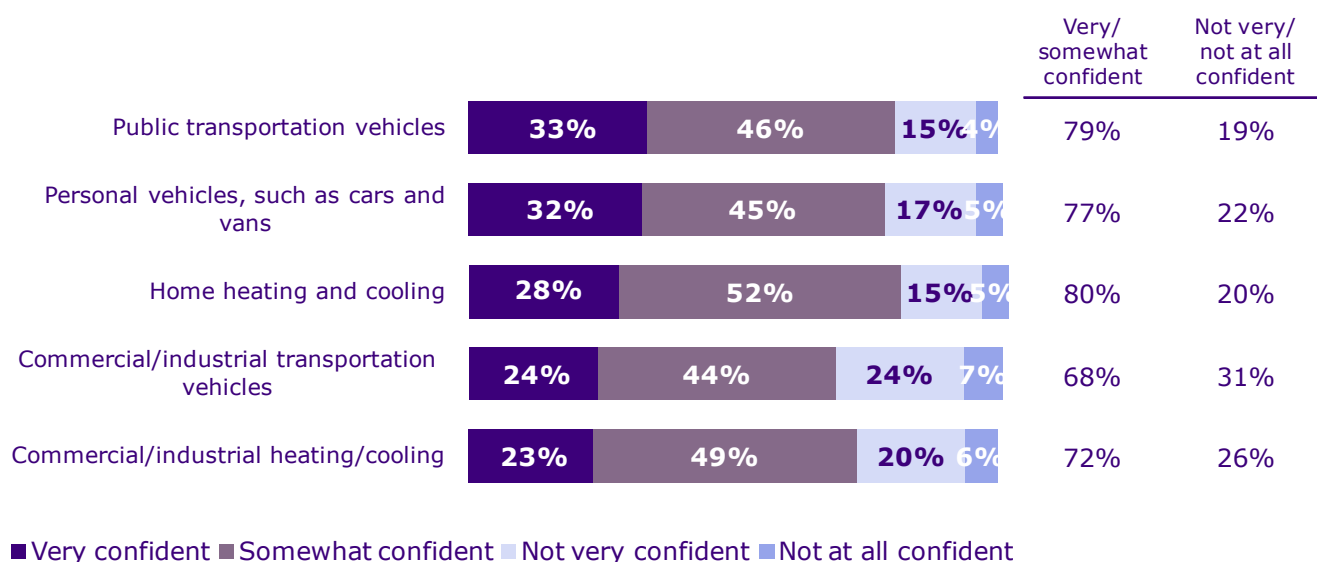
1. Confidence in Canada's ability to boost energy efficiency

Canadians are optimistic that increased energy efficiency will happen in public, personal and industrial applications, but only minorities express strong confidence.

Around two thirds of Canadians are at least somewhat confident that, in 20 years, there will be increased energy efficiency in each of five specific areas. The level of confidence is similar for all five areas, indicating that no single area is differentiated from this perspective.

One-third are very confident we will see increased efficiency in public transportation (33%) and in personal vehicles (32%), and close to three in 10 (28%) are very confident there will be home heating and cooling improvements. Around one quarter have strong confidence there will be institutional-level energy improvements in transportation (24%) and HVAC (23%).

Confidence in increasing energy efficiency in specific areas



Q11 Twenty years from now, how confident are you that Canada will succeed in increasing energy efficiency for each of the following? Are you very, somewhat, not very or not at all confident?

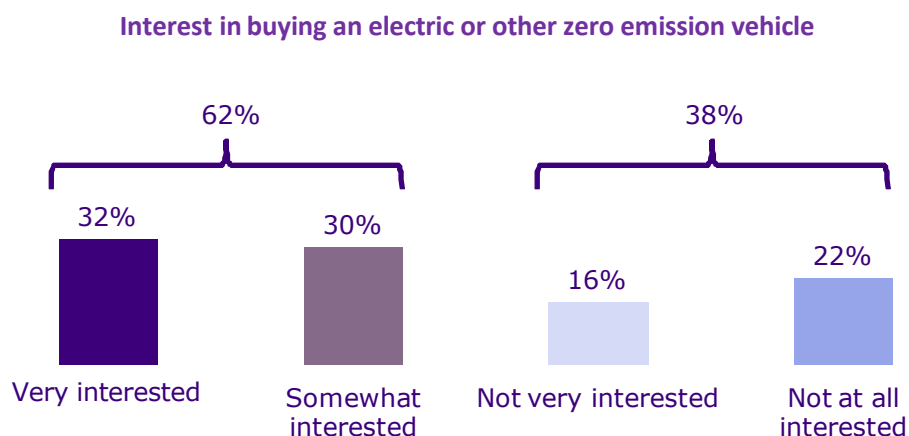
Strong confidence that each of these areas will have improvements in the next 20 years is highest in Alberta, among those who have a household income of \$150,000 or more and among men.

Older Canadians and those who have a household income of \$100,000 or more are more likely to say they are very or somewhat confident that the future will bring increased energy efficiency in all areas, while Quebecers are less confident about this.

2. Interest in buying an electric or other zero emission vehicle

Interest in purchasing an electric vehicle is relatively broad but not strong.

A majority of six in 10 Canadians are at least somewhat interested in buying electric or zero emission vehicles, although very few express strong interest (32%) at this time. The remaining four in 10 are not very (16%) or not at all interested (22%) in an electric vehicle.



Q13 How interested are you personally in eventually doing each of the following? Are you very, somewhat, not very or not at all interested? Buying an electric or other zero emission vehicle

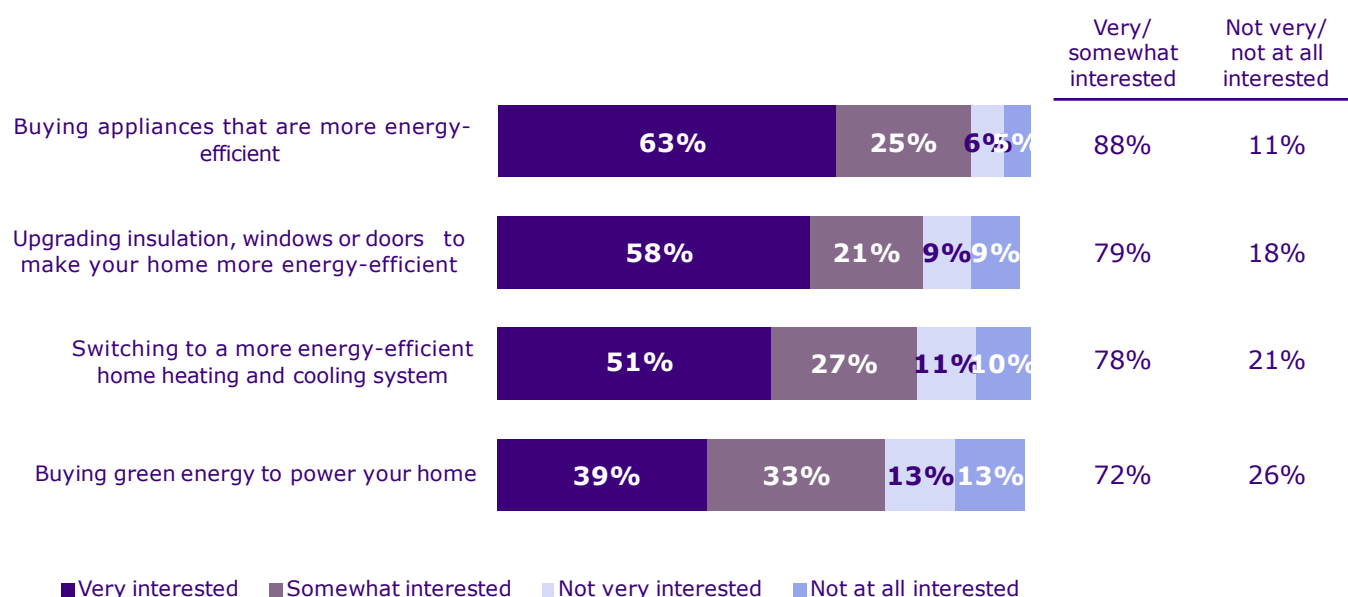
Strong interest in an electric or zero emission vehicle is highest in British Columbia (41%) and Quebec (35%), and lowest in Alberta (19%) and Manitoba and Saskatchewan (25%). Younger Canadians are also more likely to express strong interest (41% of those under 35), particularly compared to those aged 55 and older (24%). As well, allophones (42%), university graduates (39%) and Canadians living in cities (37%) are more likely to express a strong interest in buying this type of vehicle.

3. Homeowner interest in energy efficiency actions

Homeowners express considerable interest in buying energy-efficient appliances and upgrading insulation, windows and doors.

Majorities of seven in 10 or more homeowners are at least somewhat interested in taking energy-efficient actions in each of the four specific areas. Interest is highest in buying energy-efficient appliances (63% very interested) and in making their homes more energy-efficient by upgrading insulation, windows, and doors (58%). Half are very interested in switching to a more energy-efficient home heating and cooling system (51%), and four in 10 (39%) are very interested in buying green energy to power their homes.

Homeowner interest in energy efficiency actions
(Subsample: Homeowners n=1,487)



Q13 How interested are you personally in eventually doing each of the following? Are you very, somewhat, not very or not at all interested?

Strong interest in each of these four areas is highest in Atlantic Canada and the territories and lowest in Quebec and Alberta. Allophones are also more likely to express strong interest in all options tested. Younger Canadians between the ages of 18 and 34 are most likely to express strong interest in upgrading insulation, windows, or doors (65%), switching to a more energy-efficient home heating and cooling system (64%) and buying green energy to power their homes (51%).

III. Detailed methodology

Qualitative methodology

The qualitative portion of this research project was designed to contribute to the development of the quantitative questionnaire.

The target population consisted of Canadians 18 years of age and over, with a mix by age, gender, education and socio-economic status. For each group, 8–10 individuals were recruited, with a goal of 6–8 attending the discussion. One hundred participants were recruited, and 85 attended.

A series of 10 focus groups was conducted across Canada from May 23 to May 30, 2017. Two English focus groups were held in each of Toronto (May 23), Calgary (May 24), Vancouver (May 25) and St. John's (May 30), and two were conducted in French in Montréal (May 29). The groups lasted approximately 90 minutes and consisted of between six and nine participants.

Group composition

The participants in these focus groups were segmented according to household income – the first group in each city was with people with low- and middle-range household incomes. This was defined as having a household income of under \$100,000 per year in Toronto, Vancouver and Calgary and under \$75,000 per year in Montréal and St. John's. The second group in each location was composed of higher income individuals with household incomes of over \$75,000/\$100,000 per year. The 10 sessions were distributed by region and household income segment as follows (all sessions were in English unless otherwise indicated).

Date, time, group composition	Location
May 23, 5:30 p.m. Lower/middle household income	Toronto, Ontario
May 23, 7:30 p.m. Higher household income	Toronto, Ontario
May 24, 5:30 p.m. Lower/middle household income	Calgary, Alberta
May 24, 7:30 p.m. Higher household income	Calgary, Alberta
May 25, 5:30 p.m. Lower/middle household income	Vancouver, British Columbia
May 25, 7:30 p.m. Higher household income	Vancouver, British Columbia
May 29, 5:30 p.m. Lower/middle household income	Montréal, Quebec (French)
May 29, 7:30 p.m. Higher household income	Montréal, Quebec (French)
May 30, 5:30 p.m. Lower/middle household income	St. John's, Newfoundland and Labrador
May 30, 7:30 p.m. Higher household income	St. John's, Newfoundland and Labrador

Recruitment

Environics developed the recruitment screener and provided it to Natural Resources Canada (NRCan) for review prior to finalizing. The participants were recruited using a database of individuals, identified primarily through quantitative surveys, who had agreed to be re-contacted for research purposes. Recruitment involves contacting persons on the list who live in the required geographic regions on a random basis and then screening for eligibility according to the study design.

Participants were screened to ensure they were invited to the appropriate session according to their household income. Participants were also screened to ensure the groups included a mix of gender, employment status, education, age and ethnicity (to the extent possible), and that they would be comfortable voicing their opinions

in front of others. Normal focus group exclusions were in place (marketing research, media and employment in the federal government, and recent related focus group attendance).

All participants were offered an \$85 honorarium to encourage participation and thank them for their commitment.

Moderation

All groups were video and audio recorded for use in subsequent analysis by the research team – during the recruitment process and at the session sign-in, participants were asked to consent to such recording.

Derek Leebosh, Vice President, Environics, and Rick Nadeau, Senior Associate, moderated the sessions. All qualitative research work was conducted in accordance with the professional standards established by the Marketing Research and Intelligence Association (MRIA) and applicable PIPEDA legislation.

Statement of limitations

Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as indicative rather than projectable.

Quantitative methodology

The results of the survey are based on 14-minute telephone interviews conducted with a representative sample of 2,218 adult residents of Canada from June 14–30, 2017. The margin of error for a sample of 2,218 is +/-2.1 percentage points, in 19 of 20 samples (the margin of error is greater for results pertaining to regional or socio-demographic subgroups of this population).

The sample is a dual-frame land line and cellphone probability-based (RRD) sample. The Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys (www.tpsgc-pwgsc.gc.ca/rop-por/telephone-eng.html#s4) were applied in the recruitment of participants. The sample frame of 2,218 includes 1,129 respondents who participated via land line and 1,089 via cellphone.

Sample design and weighting

The survey targeted adult Canadians (18 years of age or older) and used an industry-standard “most recent birthday” selection technique to identify a respondent. A cellphone sample was also included.

The sample was stratified by region, and an oversample was performed on the territories to allow for meaningful coverage of lower population areas.

The following table indicates the unweighted and weighted geographical distribution of the sample, with the associated margin of error. Weighting was applied to the sample to ensure that the final data reflects the adult population of Canada by region, age, gender, income and education according to the most recent Census data available.

	Weighted sample size	Unweighted sample size	Margin of error*
Region			
Atlantic Canada	152	400	+/- 4.9
Quebec	556	427	+/- 4.7
Ontario	838	605	+/- 4.0
Manitoba and Saskatchewan	140	200	+/- 6.9
Alberta	234	181	+/- 7.3
British Columbia	291	205	+/- 6.8
Nunavut/N.W.T./Yukon	6	200	+/- 6.9
Canada	2,218	2,218	+/- 2.1
Gender			
Male	1,065	1,156	+/- 2.9
Female	1,153	1,062	+/- 3.0
Age			
18–34	627	478	+/- 4.1
35–54	797	672	+/- 2.9
55+	738	1,013	+/- 1.9
Education			
High school diploma or less	636	670	+/- 2.9
Trades/college/post sec., no degree	826	819	+/- 2.4
University degree	739	708	+/- 2.8
Household income			
Under \$40,000	478	465	+/- 4.5
\$40,000–\$80,000	647	662	+/- 3.0
\$80,000–\$100,000	237	229	+/- 8.6
\$100,000–\$150,000	348	340	+/- 5.8
Over \$150,000	247	264	+/- 7.4

* In percentage points, at the 95% confidence level

Questionnaire design

The questionnaire was designed by Environics in consultation with NRCan representatives. Environics reviewed the questionnaire to ensure appropriate design and identify any programming or analysis issues, providing suggestions and guidance on the survey instrument. The final study questionnaire is included in Appendix C. The questionnaire averaged 14 minutes to deliver.

Pretest

An initial pretest of 20 interviews in English and French was conducted on June 15 and audited via recordings by Environics and Government of Canada staff. These interviews included standard Government of Canada pretest probing questions.

Fieldwork

Interviewing was conducted by Elemental Data Collection (EDCI) using Computer Aided Telephone Interviewing (CATI) technology. Field supervisors were present at all times to ensure accurate interviewing and recording of responses. A minimum of 10% of each interviewer's work was unobtrusively monitored for quality control in accordance with the standards set out by the Marketing Research and Intelligence Association (MRIA).

Data analysts programmed the questionnaire in CATI then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the survey's basic logic. The CATI system handles sampling dialling, quotas, and questionnaire completion (skip patterns, branching, and valid ranges). The system also ensures that callbacks are conducted in a timely manner. No number is called twice in a two-hour period. Callbacks are conducted on different days of the week and at different times of the day (i.e. morning, afternoon). This system ensures all scheduled appointments are kept, maximizing the response rate and sample representativeness. Up to eight callbacks were made to reach each charity selected in the sample.

Quality control

The questionnaire was programmed on a state-of-the-art Computer Assisted Telephone Interviewing (CATI) system. EDCI's interviewing facilities permit the constant supervision of interviewers and unobtrusive monitoring of calls, with between 10 and 30% of all interviews monitored for quality control purposes. All respondents were offered the opportunity to complete the survey in their official language of choice. All research work was conducted in accordance with the standards established by federal government Public Opinion Research (POR) requirements, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act [PIPEDA]). The survey was registered with the MRIA's research registration system, which permits the public to verify a survey call, inform themselves about the industry and/or register a complaint.

Completion results

The sample for this survey consisted of 2,218 interviews with adult Canadians. The effective response rate for the survey is 9%.³ This is calculated as the number of responding participants (completed interviews plus those disqualified because of survey requirements and quotas being filled), divided by unresolved numbers (e.g., busy, no answer) plus non-responding households or individuals (e.g., refusals, language barrier, missed callbacks) plus responding participants $[R/(U+IS+R)]$. The disposition of all contacts is presented in the following table.

³ This response rate calculation is based on a formula developed by MRIA in consultation with the Government of Canada (Public Works and Government Services).

	TOTAL	Land line	Cellphone
Total numbers attempted	91,911	19,157	72,754
Invalid (NIS, fax/modem, business/non-res.)	64,340	6,996	57,344
Unresolved (U) (busy, no answer)	10,367	4,138	6,229
In-scope - Non-responding (IS)	4,110	1,494	2,616
<i>Language barrier</i>	471	245	226
<i>Incapable of completing (ill/deceased)</i>	189	116	73
<i>Callback (respondent not available)</i>	3,450	1,133	2,317
Total asked	13,094	6,529	6,565
<i>Refusal</i>	10,592	5,322	5,270
<i>Termination</i>	107	37	70
In-scope - Responding units (R)	2,397	1,172	1,225
<i>Completed interviews</i>	2,218	1,129	1,089
<i>NQ - Quota full</i>	104	37	67
<i>(INT30) NQ - CELLPHONE - NOT SAFE</i>	73	4	69
Response ate	9%	10%	8%
Refusal rate	82%	82%	81%
Incidence	93%	96%	89%

Non-response bias analysis

The possibility of non-response bias exists within the current sample. In particular, this survey would not include members of the population who do not have access to a telephone or who are not capable of responding to a survey in either English or French. In addition, some groups within the population are systemically less likely to answer surveys.

As is typically the case for general population telephone surveys, older individuals are easier to reach, so the survey overrepresented those age 55+ (this was corrected with age weighting). The final sample also somewhat under-represents those with high school or less education, which is a typical pattern for telephone surveys in Canada (e.g., individuals with more education are more likely to respond to telephone surveys).

Appendix A: Qualitative instruments

May 5, 2017

**Environics Research Group Limited
Focus Groups on Energy Issues
Natural Resources Canada
PN9407 -**

Recruitment for Group Discussion -

Respondent Name: _____

Home #: _____

Business #: _____

Group #: _____

Recruiter: _____

<u>GROUP 1</u> Toronto Tuesday, May 23 5:30 p.m. Low/middle income	<u>GROUP 2</u> Toronto Tuesday, May 23 7:30 p.m. Higher income	<u>GROUP 3</u> Calgary Wednesday, May 24 5:30 p.m. Low/middle income	<u>GROUP 4</u> Calgary Wednesday, May 24 7:30 p.m. Higher income
<u>GROUP 5</u> Vancouver Thursday, May 25 5:30 p.m. Low/middle income	<u>GROUP 6</u> Vancouver Thursday, May 25 7:30 p.m. Higher income	<u>GROUP 7</u> Montréal Monday, May 29 5:30 p.m. Low/middle income	<u>GROUP 8</u> Montréal Monday, May 29 7:30 p.m. Higher income
<u>GROUP 9</u> St. John's Tuesday, May 30 5:30 p.m. Low/middle income	<u>GROUP 10</u> St. John's Tuesday, May 30 7:30 p.m. Higher income		

10 recruits per session with the intent of having 8–10 show

NB: “High income” is defined as anyone with a personal annual income of over \$75,000 or anyone in a household with multiple incomes with an annual household income of over \$100,000 in Toronto, Calgary and Vancouver. In Montréal and St. John’s, the corresponding cut-offs are \$60,000 and \$75,000.

Hello/Bonjour, my name is _____ from Environics Research.

Would you prefer to continue in English or French? **[continue in language of preference or arrange callback]**

We are calling today to invite participants to attend a focus group discussion **we are currently conducting on behalf of the Government of Canada**. Your participation in the research is completely voluntary and your decision to participate or not will not affect any dealings you may have with the government. All information collected, used and/or disclosed will be used for research purposes only and administered as per the requirements of the *Privacy Act*. The session will last a maximum of 2 hours and you will receive a cash gift as a thank you for attending the session. May we have your permission to ask you or someone else in your household some further question to see if you/they fit in our study?

Yes.....1 – **CONTINUE**

No.....2 – **THANK AND TERMINATE**

ASK ALL

1. -We have been asked to speak to participants from all different ages. So that we may do this accurately, may I have your exact age please? _____. **WRITE IN**

Under 18 1 **TERMINATE**

18–24 years of age 1

25–34 years of age 2

35–44 years of age 3 **GET MIX**

45–54 years of age 4

55–64 years of age 5

65–74 years of age 6

75 years or more..... 7 **TERMINATE**

2. Are you a Canadian citizen at least 18 years old who normally resides in the [city] area?

Yes

CONTINUE

No

THANK AND TERMINATE

Don’t know/Refused

THANK AND TERMINATE

3. How long have you lived in [city]?

[IF LESS THAN TWO YEARS, THANK AND TERMINATE]

4. Are you or is any member of your household or your immediate family employed in:

	<u>No</u>	<u>Yes</u>
A market research, communications or public relations firm, or an advertising agency	()	()
Media (Radio, Television, Newspapers, Magazines, etc.)	()	()
A federal or provincial government department or agency	()	()
A political party	()	()

IF YES TO ANY OF THE ABOVE – THANK AND TERMINATE

5. Have you ever attended a discussion group or a market research focus group?

[NO MORE THAN THREE RECRUITS WITHIN EACH GROUP MAY SAY YES]

IF Q5=NO, SKIP TO Q9

6. How many focus groups have you attended in the past five years?

[TERMINATE IF MORE THAN FIVE]

7. Have you attended a discussion group or a market research focus group in the past six months?

[IF YES, THANK AND TERMINATE]

8. Have you attended a discussion group or a market research focus group about natural resources or the environment within the past two years?

[IF YES, THANK AND TERMINATE]

9. INDICATE:	Male	1	50/50 split
	Female	2	

10. Are you the head, or co-head of your household, that is, a person who makes key decisions in your household?

Yes	CONTINUE
No	THANK AND TERMINATE
Don't know/Refused	THANK AND TERMINATE

11. Do you currently have children under the age of 18 living in the house with you?

Yes
No

GET MIX

12. How many people 18 years of age and over are there in your household, including yourself?

One
More than one

ASK Q. 13, THEN SKIP TO Q. 15
SKIP TO Q14

IF A SINGLE PERSON HOUSEHOLD IN Q. 12, ASK:

13. Which of the following categories best corresponds to YOUR total annual income, before taxes, for 2016? Would it be...? **READ [ENSURE GOOD MIX]**

- | | |
|----------------------------|---|
| 01 - Under \$20,000 | RECRUIT FOR 1ST GROUPS |
| 02 - \$20,000 to \$40,000 | RECRUIT FOR 1ST GROUPS |
| 03 - \$40,000 to \$60,000 | RECRUIT FOR 1ST GROUPS |
| 04 - \$60,000 to \$75,000 | RECRUIT FOR 1ST GROUPS [ST. JOHN'S & MONTRÉAL – RECRUIT for 2nd GROUP] |
| 05 - \$75,000 to \$100,000 | RECRUIT for 2nd GROUP |
| 06 – Over \$100,000 | RECRUIT for 2nd GROUP |

IF A MULTIPLE PERSON HOUSEHOLD IN Q. 12, ASK:

14. Which of the following categories best corresponds to the total combined annual income of all members of your household, before taxes, for 2016? Would it be ...? **READ [ENSURE GOOD MIX]**

- | | |
|----------------------------|---|
| 01 - Under \$20,000 | RECRUIT FOR 1ST GROUPS |
| 02 - \$20,000 to \$40,000 | RECRUIT FOR 1ST GROUPS |
| 03 - \$40,000 to \$60,000 | RECRUIT FOR 1ST GROUPS |
| 04 - \$60,000 to \$75,000 | RECRUIT FOR 1ST GROUPS |
| 05 - \$75,000 to \$100,000 | RECRUIT FOR 1ST GROUPS [ST. JOHN'S & MONTRÉAL – RECRUIT for 2nd GROUP] |
| 06 – Over \$100,000 | RECRUIT for 2nd GROUP |

15. Which of the following best describes your employment situation? Are you ...? **[READ LIST]**

- | | | |
|----------------------------------|-----|---------------------------|
| Employed full-time (35 hr +) | () | 4 minimum |
| Employed part-time (under 35 hr) | () | 2 max. |
| Homemaker | () | 1 max. SKIP TO Q18 |
| Student | () | 1 max. SKIP TO Q18 |
| Retired | () | 2 max. |
| Currently not working | () | 1 max. SKIP TO Q18 |

16. What is your current occupation? -

Type of Job

Type of Company

17. What is your spouse's occupation?

Type of Job

Type of Company

TERMINATE IF OCCUPATION RELATES TO EXCLUSIONS IN Q. 4

18. Could you please tell me what is the last level of education that you completed?

Some High School only.....1

Completed High School.....2

Trade School certificate.....3

Some Post secondary.....4

Completed Post secondary.....5

Graduate degree.....6

GET MIX

19. If you suddenly had \$1,000,000, what would you do?

[IF PARTICIPANT IS INARTICULATE OR UNCOMMUNICATIVE, THANK AND TERMINATE]

20. Participants in group discussions are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others? Are you ... (read list)

Very comfortable.....1- **MIN 5 PER GROUP**

Fairly comfortable...2

Not very comfortable.3|- **TERMINATE**

Very uncomfortable...4|- **TERMINATE**

21. Sometimes participants are also asked to write out their answers on a questionnaire. Is there any reason why you could not participate? If you need glasses to read, please remember to bring them. (Add hearing impairment.)

Yes.....1 - **TERMINATE**

No.....2

NOTE: TERMINATE IF RESPONDENT OFFERS ANY REASON SUCH AS SIGHT OR HEARING PROBLEM, A WRITTEN OR VERBAL LANGUAGE PROBLEM, A CONCERN WITH NOT BEING ABLE TO COMMUNICATE EFFECTIVELY.

INTERVIEWER TELL RESPONDENT

PLEASE BRING ALONG SOME FORM OF IDENTIFICATION AS YOU MAY BE ASKED TO SHOW IT.

IMPORTANT:

The session is 2 hours in length, but we are asking that all participants arrive 15 minutes prior to the start time of the session.

Tuesday, May 23 (5:30 p.m. and 7:30 p.m.) - Toronto
CRC-Research House
1867 Yonge Street, Suite 200
416-488-2328

Wednesday, May 24 (5:30 p.m. and 7:30 p.m.) - Calgary
Qualitative Coordination
707 10th Avenue SW, Suite 120
403-229-3500

Thursday, May 25 (5:30 p.m. and 7:30 p.m.) - Vancouver
CRC Vancouver
1398 West 7th Avenue
1-866-455-9311

Monday, May 29 (5:30 p.m. and 7:30 p.m.) - Montréal
CRC Montreal
1610 Rue Ste-Catherine Ouest, Bureau 411
1-800-932-7511

Tuesday, May 30 (5:30 p.m. and 7:30 p.m.) - St. John's
Market Quest Research
5 Job Street, 4th Floor
709-753-5172

Are you able to be at the research facility 15 minutes prior to the session time?

Yes.....1-**CONTINUE**

No.....2-**TERMINATE**

The session will last 2 hours in total, and you will receive **\$85** to thank you for your participation.

location:

INTERVIEWERS: Tell respondent that it is a small group and anyone who does not show or cancels at the last minute will compromise the project. Make sure they know we feel their opinions are valuable and we are serious about finding out what they have to offer.

NOTE: PLEASE TELL ALL RESPONDENTS THAT THEY WILL RECEIVE A CONFIRMATION CALL THE DAY PRIOR TO THE SESSION. IF FOR SOME REASON THEY HAVE NOT HEARD FROM US THEY SHOULD CONTACT US AT _____. IF THEIR NAME IS NOT ON THE ATTENDANCE FORM THEY WILL NOT BE ADMITTED TO THE GROUP.

Environics Research Group Limited
Focus Groups on Natural Resource Issues – Discussion agenda
Natural Resources Canada
PN9407

1.0 Introduction to procedures (10 minutes)

Welcome to the focus group. We want to hear your opinions. Feel free to agree or disagree. Even if you are just one person among 10 that takes a certain point of view, you could represent a lot of people who feel the same way as you do.

You don't have to direct all your comments to me; you can exchange ideas and arguments with each other, too.

There are some observers watching the session on the other side of the two-way mirror, and they are part of the research team. We are also video-taping this session to help me write my report. The video will only be used internally to analyse the research and will not be released to anyone else. I may take some notes during the group to remind myself of things also. Anything you say here will remain confidential and anonymous and any comments you make will not be linked to you by name in any reporting we do on this project.

I should also mention that I work for a public opinion research company. I did not create any of the materials we will be looking at nor do I work for the client who commissioned the materials.

The host/hostess will pay you your incentives at the end of the session.

Let's go around the table so that each of you can tell us your name and a little bit about yourself, such as who lives with you in your house, what kind of work you do if you work outside the home, etc.

2.0 WARM UP (5 minutes)

Tonight, we are going to be discussing issues around natural resources. I want you to each write down on paper what couple of words come to mind when you think of Canada's natural resources.

WRITE ON FLIP CHART

3.0 ATTITUDES - NATURAL RESOURCE INDUSTRIES (5 minutes)

When you think of Canada's natural resources, what specific industries come to mind?

PROBE IF NOT MENTIONED: Oil/gas, mining, forestry, hydro, renewables (i.e. wind, solar etc.)

4.0 ROLE OF GOVERNMENT/REGULATORS ON NATURAL RESOURCES (10 minutes)

When it comes to the development of Canada's natural resources, what is the Government of Canada's main role? What should it be doing on this issue?

What action is the Government of Canada taking these days with regard to natural resource industries? Have you heard of anything specific?

What do you think of the way natural resource projects are reviewed and approved in Canada? Does the system work as it should, or does it need to be changed in any way? In what way?

What is the main role of regulators in Canada?

Have any of you heard anything about Canada's softwood lumber dispute with the United States? What have you heard?

What steps do you think the Government of Canada should take on the softwood lumber issue?

5.0 VALUES GUIDING ENERGY DECISIONS (15 minutes)

I want to focus more specifically on the energy sector within the natural resource sector (i.e. oil and gas, hydro, coal, renewables). There are many different values that could guide Canada in making decisions about our energy future. I'm going to hand out a list of eight possible values. I would like you to each rank the top three that to you personally should guide us in making decisions about Canada's energy future. Please number the one value out of these eight that is most important to you #1, second most important is #2 and the 3rd most important is #3.

MODERATOR TO GO OVER EACH VALUE AND ASK HOW MANY PEOPLE RANKED IT 1ST, 2ND OR 3RD

I. Minimizing environmental impacts

J. Keeping energy cheap and affordable

K. Ensuring energy is available and reliable

L. Generating jobs

M. Ensuring energy is produced, transported and used safely

N. Addressing climate change by reducing greenhouse gas emissions

O. Contributing to Canada's economy by growing the clean technology sector

P. Contributing to Canada's economy by getting our natural resources to market

Thinking about Canada's energy future, what is the trade-off between affordability and the environment? Is one more important than the other?

Is there a way the government can ensure both of these priorities are met? How?

6.0 ENERGY AND THE ECONOMY (15 MINS)

How important do you think Canada's energy industries are to the Canadian economy now?

How important do you think Canada's energy industries will be to the Canadian economy in the future?
Will energy be more or less important than it is now or will it be about the same as now?

What are you most concerned about when it comes to energy in Canada?

What about the potential **decline of the United States' demand** for energy produced in Canada? Have you heard anything about that? How much of a concern is that to you?

What about the **cost and affordability** of the energy you use every day (e.g. in your home, your vehicle)? To what extent does that concern you?

7.0 ENERGY AND THE ENVIRONMENT (15 MINS)

Now let's turn to the issue of energy and the environment. What are your biggest environmental concerns with regard to energy?

POSSIBLE PROBES IF NOT MENTIONED: Air pollution? Climate change? Leaks?

What should the Government of Canada do with regard to energy to help protect the environment?

As you know, we all use energy in our day-to-day lives, and we as a country also produce lots of energy. What is more of an environmental concern to you, the energy we use in Canada or the energy we produce?

To what extent are you concerned about the environmental impact of the energy we use in Canada?

To what extent are you concerned about the environmental impact of the energy we produce in Canada?

As you know, energy gets transported across Canada by road, rail and pipeline. Do you think the mechanisms in place to transport energy across and outside Canada safe? How could these be safer?

8.0 CLIMATE CHANGE (10 MIN)

I want to ask you specifically about the issue of climate change. How important is it for Canada to take action on climate change?

What are the most effective steps Canada can take to address climate change?

What is clean energy? How confident are you that Canada can produce clean energy?

What would be examples of clean energy that we produce here in Canada?

PROBE IF NOT MENTIONED: What about nuclear power?

As far as you know, does nuclear power generate greenhouse gas emissions?

In fact, nuclear power generation does not generate greenhouse gas emissions. In view of that, would you support maintaining or increasing the use of nuclear energy in Canada, if it were necessary to meet Canada's greenhouse gas reduction targets? Why or why not?

9.0 ENERGY AND TRANSPORTATION AND BUILDINGS (15 MINS)

Let's talk a bit about energy and transportation (e.g. cars, trucks). How can we reduce energy use in the transportation sector? What are some of the challenges?

As far as you know, how might the design and use of personal vehicles (i.e. cars) change in your lifetime? What about in 20 years from now?

What about the way homes and businesses are powered? Do you expect that to change in your lifetime? What changes do you foresee? What about in 20 years from now?

What are some of the benefits of these changes? Are there any drawbacks?

10.0 CONCLUSION

We have covered a lot of topics today and really appreciate you taking the time and energy to come down here and give your opinion. Your input is very important and insightful. To conclude, I wanted to ask you whether you have any last thoughts that you want to give the Government of Canada.

THANK YOU FOR PARTICIPATING!

Appendix B: Quantitative instrument

June 15, 2017

Environics Research Group Limited
Public Opinion on Natural Resource Issues 2017 – Questionnaire
Natural Resources Canada
PN9407

Hello/Bonjour (pause), My name is _____, and I am calling from Environics, a public opinion research company. We are conducting a study on behalf of the Government of Canada to find out what people think about some issues facing Canada today. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

Note: If at this point the respondent prefers to respond in French, the interviewer must be able to either proceed with the interview in French or read the following statement: “Je vous remercie. Quelqu’un vous rappellera bientôt pour mener le sondage en français.”

Instructions: *If the initial interviewer is not bilingual and the respondent requests the interview in the other official language, a transfer or callback will be made within 20 minutes of the initial call. This would apply unless the respondent prefers a callback at a time that was more convenient for them.*

Have I reached you on a cellular telephone or a land line?

Cellphone
Land line

IF CELLPHONE, ASK

Are you in a safe place to talk on the telephone? **(DO NOT READ LIST)** -

Yes
No

IF NO, READ:

We would like to conduct this interview with you when it is safe and convenient to do. Thank you for your time, we will call back when it is more convenient.

READ TO ALL

The survey takes about 12 minutes to complete. It is registered with the national survey registration system. Your participation is voluntary and completely confidential. Your answers will remain anonymous.

May I speak to the person in your household, 18 years of age or older, who has had the most recent birthday. Would that be you?

Yes **CONTINUE**

No **ASK TO SPEAK TO PERSON IN HOUSEHOLD WHO IS 18 YEARS OF AGE OR OLDER AND HAD THE MOST RECENT BIRTHDAY AND RE-INTRODUCE. IF UNAVAILABLE, SCHEDULE A CALLBACK**

SURVEY REGISTRATION DISCLOSURE

[Note to Interviewer: If asked, please read:] *The survey is registered with the Market Research and Intelligence Association (MRIA) as per Government of Canada standards. For further information on the project, please contact the Association at 1- 888-602-6742, ext. 8728. The MRIA project registration number is 20161123-253Y. Information about the MRIA can be found on-line at www.mria-arim.ca or call 1-888-602-6742.*

D1 RECORD GENDER

Male
Female

D2 In which province or territory do you live? NOTE QUOTAS

Newfoundland and Labrador	1
Prince Edward Island	2
Nova Scotia	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11
Northwest Territories	12
Nunavut	13

ASK ALL CELLPHONE RESPONDENTS:

D3. At home, do you have a traditional land line telephone, in addition to your cellphone?

Yes
No

ASK ALL LAND LINE RESPONDENTS:

D4. At home, do you have a cellphone in addition to your traditional land line phone?

Yes
No

MAIN SURVEY

First some questions about natural resource industries in Canada. These would include such industries as oil and gas, mining, forestry, hydro power, wind, solar, geothermal and more.

1. What would you say is the single biggest issue Canada faces when it comes to our natural resources? **DO NOT READ ... ACCEPT ONE RESPONSE ... IF RESPONDENT SAYS “ENVIRONMENT” OR “ENVIRONMENTAL ISSUES/PROTECTION,” PROBE FOR A SPECIFIC ISSUE. IF THEY SAY “PIPELINES,” PROBE FOR WHETHER THEY MEAN THE NEED FOR APPROVALS AND CONSTRUCTION OR CONCERNS ABOUT OIL SPILLS AND OTHER ENVIRONMENTAL IMPACTS.**

- 01 – Air pollution/emissions
- 02 – Water pollution/contamination
- 03 – Protecting forests, lakes, habitat
- 04 – Energy costs
- 05 – Reliable energy supply
- 06 – Trade issues with the U.S.
- 07 – Softwood lumber
- 08 – Pipeline approval/need for construction
- 09 – Pipelines/oil spills/environmental impact
- 10 – Making sure we have enough resources for future generations
- 11 – More jobs in natural resources
- 12 – Marketing our natural resource products
- 11 – Low oil prices
- 12 – Climate change
- 13 – Fracking
- 14 – Forestry issues
- 97 – Other (SPECIFY) _____
- 99 – DK/NA

2. How would you rate the overall performance of the Government of Canada in terms of managing Canada’s natural resources? Use a 10-point scale where “1” means a very poor job and 10 means a very good job.

01 02 03 04 05 06 07 08 09 10 99

3. When it comes to Canada’s natural resources, how would you rate the performance of the Government of Canada in each of the following areas? Use a 10-point scale where “1” means a very poor job and 10 means a very good job. **READ AND ROTATE**

01 02 03 04 05 06 07 08 09 10 99

- a. Making sure natural resources are developed in a way that respects the environment
- b. Promoting the economic growth of natural resource industries
- c. Striking a balance between environmental and economic considerations
- d. Managing natural resource development so it is sustainable for the future

- e. Making sure new natural resource projects are properly reviewed before being approved
- f. Investing in clean energy and clean technology

4. I now want to focus more specifically on Canada's energy industries. Which one of the following do you think should most guide decisions about Canada's energy future? **READ AND ROTATE**

- 01 – Keeping energy affordable
- 02 – Generating more energy-related jobs
- 03 – Making sure our energy is produced, transported and used safely
- 04 – Reducing greenhouse gas emissions from energy
- 05 – Getting our energy products to market
- 99 – DK/NA

5. How important would you say Canada's energy industries are to Canada's economy, using a 10-point scale where "1" means not important at all and 10 means extremely important?

01 02 03 04 05 06 07 08 09 10 99

6. For each of the following would you say you've heard a lot about it, you've heard some things about it, you've heard very little about it, or you've never heard of it? **RANDOMIZE**

- 01 – Heard a lot
- 02 – Heard some things
- 03 – Heard very little
- 04 – Never heard of it
- 99 – DK/NA

ASK ALL

- a. Trans Mountain Expansion Project
- b. Energy East Pipeline Project

BRITISH COLUMBIA ONLY

- c. Pacific Northwest (PNW) Liquefied Natural Gas Project (BC)
- d. Site C Clean Energy Project (BC)
- e. Kitimat Clean Oil Refinery (BC)

ALBERTA ONLY

- f. 2017 NGTL System Expansion Project (AB)

MANITOBA AND SASKATCHEWAN ONLY

- g. Keeyask Hydro Electric Project (MB)
- h. Chinook Power Station (SK)

ONTARIO ONLY

- j. Resource Development in the Ring of Fire (ON)
- k. Bruce Power Refurbishment (ON)

QUEBEC ONLY

- l. Romaine Complex (QC)
- m. Plan Nord (QC)

ATLANTIC PROVINCES ONLY

- n. Muskrat Falls Project (NL)
- o. Labrador-Island Transmission Link (NL)
- p. Maritime Link Project (NL/NS)

7. Do you strongly support, somewhat support, somewhat oppose or strongly oppose more development of each of the following forms of energy in Canada? **READ AND ROTATE**

- a. Oil
- b. Natural gas
- c. Solar
- d. Wind
- e. Bioenergy, that is energy from organic material from plants and animals
- f. Hydro power
- g. Nuclear energy

- 01 – Strongly support
- 02 – Somewhat support
- 03 – Somewhat oppose
- 04 – Strongly oppose
- 99 – DK/NA

8. Looking ahead to the future, do you think demand in Canada for each of the following forms of energy will go up, go down or stay about the same as now? **READ AND ROTATE**

- a. Oil
- b. Natural gas
- c. Solar
- d. Wind
- e. Bioenergy, that is energy from organic material from plants and animals
- f. Hydro power
- g. Nuclear energy

- 01 – Demand will go up
- 02 – Demand will go down
- 03 – Demand will stay about the same
- 99 – DK/NA

9. Thinking about energy issues in Canada today, would you say you are very, somewhat, not very or not at all concerned about each of the following? **READ AND ROTATE**

- a. The price you pay for energy
- b. The impact of the energy industry on the environment
- c. A potential decline in American demand for Canadian energy exports
- d. Canada's ability to transition to more clean, renewable energy

- 01 - Very concerned
- 02 - Somewhat concerned
- 03 - Not very concerned
- 04 - Not at all concerned
- 99 – DK/NA

10. What would you say is your single biggest environmental concern when it comes to Canada's energy industries? **DO NOT READ ... ACCEPT ONE RESPONSE**

- 01 – Air pollution
- 02 – Protecting forests, lakes, habitat
- 03 – Water pollution
- 04 – Climate change/global warming/greenhouse gas emissions
- 05 – Oil spills
- 06 – Nuclear waste/radiation
- 97 – Other (SPECIFY) _____
- 99 – DK/NA

11. Twenty years from now, how confident are you that Canada will succeed in increasing energy efficiency for each of the following? Are you very, somewhat, not very or not at all confident? **READ AND ROTATE**

- a. Commercial and industrial transportation vehicles
- b. Public transportation vehicles
- c. Personal vehicles, such as cars and vans
- d. Home heating and cooling
- e. Commercial and industrial heating and cooling

- 01 - Very confident -
- 02 - Somewhat confident -
- 03 - Not very confident -
- 04 - Not at all confident -
- 99 – DK/NA -

12. Do you own the home in which you reside?

- 01 - Yes -
- 02 - No [**IF NO, SKIP Q13 items a, b, c and d**] -

13. How interested are you personally in eventually doing each of the following? Are you very, somewhat, not very or not at all interested? **READ AND ROTATE**

- a. Upgrading insulation, windows or doors to make your home more energy efficient
- b. Buying appliances that are more energy-efficient
- c. Switching to a more energy-efficient home heating and cooling system
- d. Buying green energy to power your home

ASK ALL

e. (**ASK ALL**) Buying an electric or other zero-emission vehicle

- 01 - Very interested -
- 02 - Somewhat interested -
- 03 - Not very interested -
- 04 - Not at all interested -
- 99 – DK/NA -

DEMOGRAPHICS

And now a few final questions for demographic purposes.

D5. Which of the following best describes your own present employment status? **READ**

- 01 - Working full-time -
- 02 - Working part-time -
- 03 - Unemployed or looking for a job -
- 04 - Self-employed -
- 05 - Stay at home full-time -
- 06 - Student, or -
- 07 - Retired -
- VOLUNTEERED -
- 99 - REFUSAL -

D6 In what year were you born?

(RECORD YEAR - XXXX) -
9999 – DO NOT READ: Don't know/Refused -

D7 What is the highest level of formal education that you have completed? **DO NOT READ**

- 01 – Grade 8 or less
- 02 - Some high school (Grade 9–11)
- 03 - Completed high school (Grade 12 or 13)
- 04 – Registered apprenticeship or other trades certificate or diploma
- 05 – College, CEGEP or other non-university certificate diploma
- 06 – University certificate or diploma below the bachelor's degree level
- 07 - Bachelor's degree
- 08 - Post graduate degree above bachelor's degree level
- 99 - DK/Refused

D8 What language do you speak most often at home? Is it ... [READ LIST — ACCEPT ALL THAT APPLY]

01 - English

02 - French

03 - Another language **DO NOT SPECIFY - VOLUNTEERED -**

99 – DK/NA

D9 Which of the following categories best describes your total household income for 2016? That is, the total income of all persons in your household combined, before taxes [READ LIST]?

01 - Under \$20,000 -

02 - \$20,000 to \$40,000 -

03 - \$40,000 to \$60,000 -

04 - \$60,000 to \$80,000 -

05 - \$80,000 to \$100,000 -

06 - \$100,000 to \$150,000 -

07 - Over \$150,000

99 - Refused -

D10. How would you describe the community you live in? Is it ... (**READ LIST** until interrupted)

01 - A rural area of 5,000 people or less

02 - A rural area of 5,000 to 10,000 people

03 - A town or city of 10,000 to 100,000 people

04 - An urban centre of 100,000 to 500,000 people -

05 - An urban centre of 500,000 or more people

VOLUNTEERED -

98 - Don't know / No answer

99 - PREFER NOT TO SAY

D11 And finally, to better understand how results vary by region, may I have your 6-digit postal code?

ACCEPT FIRST THREE DIGITS IF THAT IS ALL RESPONDENT IS WILLING TO GIVE

999999 – DK/NA

This completes the survey. In case my supervisor would like to verify that I conducted this interview, may I have your first name?

First Name: _____

This survey was conducted on behalf of Natural Resources Canada and is registered under the federal *Access to Information Act*. Thank you very much for your participation. -

RECORD: -

Language of interview -

English	1 -
French	2 -