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Canada

Pêches et Océans
Canada

Canadians' Awareness and Understanding of Canada's Blue Economy

Summary

Prepared for Fisheries and Oceans Canada

Supplier: EKOS RESEARCH ASSOCIATES INC.

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For more information on this report, please contact DFO at :

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Ce rapport est aussi disponible en français

Canadians' Awareness and Understanding of Canada's Blue Economy

Final Report

Prepared for Fisheries and Oceans Canada

Supplier name: EKOS RESEARCH ASSOCIATES INC.

Date: April 5, 2022

This research report presents the results of an online and a telephone survey conducted by EKOS Research Associates Inc. on behalf of Fisheries and Oceans Canada. The research involved a survey of 2,146 Canadians. The survey was conducted across Canada in both official languages. The field dates for the survey were February 3-16, 2022.

Cette publication est aussi disponible en français sous le titre : Connaissance et compréhension des Canadiens de l'économie bleue du Canada

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SUMMARY

A. Background and Objectives

Working alongside multiple other government departments and agencies, Fisheries and Oceans Canada (DFO) is leading the development of a comprehensive strategy to guide future government actions and investments to grow Canada's ocean economy, create jobs and opportunities, while advancing reconciliation with Indigenous peoples and Canada's conservation objectives.

Canada is in the process of developing a Blue Economy Strategy. At the same time, DFO will also begin a campaign to increase visibility, educate, and launch the Strategy as well as promote Canada internationally as a strong blue economy nation.

DFO has a need to evaluate Canadians' current understanding and awareness of the blue economy in order to best determine future communications approaches, and to establish a baseline against which impacts and progress of the strategy could be measured against. Consequently, DFO commissioned EKOS Research Associates to undertake a baseline survey of Canadians that examines their awareness and understanding of Canada's blue economy as well as existing government actions taken in the oceans.

This research will provide a baseline of Canadians' awareness and understanding of Canada's efforts to grow an ocean-based blue economy; of Canada as an ocean nation; of opportunities, such as employment that the ocean has to offer; perceptions of ocean health; of ocean innovations; and perceptions of Canada as an international leader in the ocean space. The results of the research will better inform communications planning, outreach and education activities, while also informing Canadians of opportunities in Canada's blue economy.

B. Methodology

The methodological approach for this study involved a national online/telephone survey of Canadians and Indigenous populations. A total of 2,146 Canadians, 18 years of age or older, were surveyed. The survey oversampled Indigenous respondents (n=306) and residents along Canada's coast lines (n=702) as part of the study.

Below we provide more detail on the methodology associated with both the online and telephone components of the research.

Probit Panel (Online Sample)

We used our probability-based online panel, *Probit*, for the online completions. *Probit* is an online research panel that has been designed by EKOS to provide statistically representative data. Our panel offers complete coverage of the Canadian population (Internet, phone, cell phone), random recruitment (participants are recruited randomly, they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling, and their demographic information is confirmed by live interviewers.

The distribution of the recruitment process for our panel mirrors the actual population in Canada (as defined by Statistics Canada). As such, our panel can be considered representative of the general public (survey results from our online panel support confidence intervals and margin of error estimates, which is unique in Canada). The overall panel size is roughly 100,000 Canadian households. Random stratified samples are drawn from the panel database for individual research assignments.

Telephone Sample

EKOS relies on Survey Sample for the sample requirements of our telephone surveys. The software uses the most up-to-date directories as they become available and is updated quarterly. It samples by Random Digit Dial (RDD) methodology and checks its samples against published phone lists to divide the sample into "Directory Listed" (DL) and "Directory Not Listed" (DNL) RDD components. The flexibility of this software allows one to sample within specific regions or cities. One can sample according to population representativeness or stipulate stratification parameters, as required. Once the sample is determined for a specific survey, the numbers are imported into our Computer Assisted Telephone Interview (CATI) system and quotas are set for individual characteristics.

We completed 679 telephone interviews, and 1,467 cases were collected online. Results were weighted by region, gender, and age, as well as by Indigenous and coastal populations, to ensure that the sample is representative of the Canadian population 18 years of age and older.

Response Rate

The telephone response rate for this survey was 4.6 per cent. The response rate is calculated by dividing the in-scope responding (990) by the total (functional) sample (21,584) – see table below.

Total Numbers Attempted		
	Invalid numbers	7,789
	Blocked	203
	Business	217
	Duplicate	26
	Invalid	7,343
U	Unresolved	16,370
	No answer	0
	Callbacks	16,370
IS	In-scope – Not responding	4,224
	Respondent refusal	4,224
	Selected respondent not available	0
	Qualified respondent break-off	0
R	In-scope – Responding	990
	Language problem	63
	Quota filled	12
	Other disqualify	236
	Completed interviews	679
	Total (U + IS + R)	21,584
	RESPONSE RATE (R divided by Total)	4.6%

The online response rate for this survey was 10.6 per cent. The online response rate is calculated as follows: a total of 13,911 email invitations were sent out, and 56 bounced back, for a total of 13,855 valid emails. A total of 1,467 cases were completed, so dividing 1,467 by 13,855 results in a response rate of 10.6 per cent.

Appendix A contains the full survey questionnaire.

C. Key Findings

Outlined below are key findings from the study organized by topic area. The remainder of this report describes survey results in more detail.

Awareness and Interest in Oceans-Related Issues

Results reveal limited awareness of oceans-related issues among Canadians: only one in five (21 per cent) say they are aware of oceans-related issues, while 43 per cent say they have little awareness of these issues.

Results also suggest limited interest in oceans-related news: three in ten Canadians (31 per cent) indicate they search for oceans-related news/issues, while the majority (68 per cent) do not seek out this type of information. And among those who search for oceans-related news, most do so on an infrequent basis.

Interestingly, despite limited awareness and interest in oceans-related issues, most Canadians (76 per cent) agree that Canada is an “ocean nation”.

When asked whether they are currently, or have ever studied and/or been trained in an area related to the oceans, only 5 per cent of Canadians say they have been trained in this area, while a clear majority (95 per cent) say they have not.

Respondents were also asked whether they are currently or have ever been employed in an ocean-based sector. The vast majority of respondents say they have not been employed in an ocean-based sector (96 per cent).

Those not employed in an ocean-based sector were asked whether they would consider a job in this sector. Only one in four of these respondents (25 per cent) say they would consider a job in an oceans-based sector; most (64 per cent) indicated they would not consider an oceans-based job.

Understanding of Actions on the Oceans

Results also suggest limited awareness among Canadians of Canada’s actions on the oceans. Only about one in three (35 per cent) express at least some awareness of how Canada is using ocean resources sustainably for economic growth, and only about three in ten express at least

some awareness of Canada's international actions on oceans (29 per cent), or innovations that Canada is leading that improve ocean health and economic growth (27 per cent).

Despite limited awareness of Canada's actions on the oceans, 85 per cent of Canadians believe the health of Canada's oceans and marine environments is important, and 70 per cent feel it is important that Canada takes a global leadership role on the blue economy (i.e., restoring ocean health, tackling marine challenges such as plastics, and contributing to ocean science).

Results also reveal that six in ten Canadians (59 per cent) believe it is important that the benefits of ocean-related growth be distributed fairly.

Importance of Various Aspects of the Ocean

Canadians were asked what they value about the oceans on Canada's coasts. Results reveal that biodiversity/aquatic life is rated highest, followed by environmental health, and the oceans as a food source. The aesthetic beauty of the oceans, its economic value, and recreational aspects of the oceans (e.g., fishing, boating) are valued by at least six in ten Canadians. Canada's oceans as an energy source is assigned lowest value by Canadians.

Canadians were then asked what priority the Government of Canada should give to each of these aspects of the ocean and its resources. The environmental health of the oceans and biodiversity are assigned highest priority. The ocean as a food source, and the economic value of the ocean are seen as middle priorities. The ocean as an energy source, and the aesthetic beauty of the ocean are seen as lower level priorities, and recreational use of the ocean is assigned lowest priority among the issues examined.

When asked which **one** of these issues should be given highest priority by the Government of Canada, environmental health tops the list, followed fairly distantly by economic value, and biodiversity.

Awareness of Government of Canada's Ocean-Related Targets and Programs

Survey results suggest Canadians have limited awareness of government targets for ocean conservation. When asked whether they are aware the Government of Canada has set targets for ocean conservation, most Canadians (56 per cent) say they are not aware.

However, despite limited awareness of targets for ocean conservation, a clear majority of Canadians (60 per cent) support the Government of Canada's commitment to protecting 25% of our oceans by 2025, and only 6 per cent are not supportive of this commitment.

Results further suggest Canadians have limited awareness of Government of Canada policies, programs and activities to support the economic growth of oceans. Four in ten (42 per cent) indicate they are aware of these types of programs, however, a similar proportion (41 per cent) indicate they are unsure.

When asked whether they think the Government of Canada has done enough to support the economic growth of ocean sectors, most Canadians again express a lack of awareness about Government of Canada's efforts in this area. Seventeen per cent think that the government has done enough in this area, while three in ten (34 per cent) feel the government has not done enough, however almost half (48 per cent) could not provide a response to this question.

Despite limited awareness of government efforts in the oceans, when asked how important it is that Canada develops a strategy to guide activities and investments in our oceans, a clear majority (71 per cent) say they consider this to be important, and only 5 per cent feel this to be of little importance.

Canadians were also asked if they have seen, read, or heard anything about the Government of Canada's Blue Economy Strategy. As with many other oceans-related issues, public awareness of this program is quite limited: only one in five (18 per cent) say they are aware of this program, while the majority (78 per cent) indicate they are not aware of this initiative.

Those who indicated they were aware of the Government of Canada's Blue Economy Strategy were asked, unprompted, what they have seen, read or heard about the program. Cleaning up oceans/the environment was mentioned most often (13 per cent), followed by fishery sustainability (9 per cent). However, fully 51 per cent of those who claimed awareness of the Blue Economy Strategy did not provide a response to this question.

Conclusions and Implications

Survey results reveal limited awareness of oceans-related issues among Canadians, both in general, and in terms of the Government of Canada's actions to support ocean health and economic well-being. However, despite limited awareness of oceans issues, the public strongly support action to improve the health of Canada's oceans, and in taking a global leadership role

in this area. Canadians also feel the Government of Canada needs to do more to support the economic growth of ocean sectors.

These results provide a clear baseline of Canadians' awareness and understanding of Canada's efforts to grow an ocean-based blue economy. As the Blue Economy Strategy is being launched later this year, it will be important to track these findings in order to measure whether there has been an increase in public awareness of oceans-related issues and the Government of Canada's actions in the oceans. It will also be important to see if public support and approval for Government of Canada's actions in the oceans increase as awareness grows.

D. Contract Value

The contract value for the POR project is \$99,989.85 (including HST).

Supplier Name: EKOS Research Associates

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E. Political Neutrality Certification

This certification is to be submitted with the final report submitted to the Project Authority.

I hereby certify as Senior Officer of EKOS Research Associates Inc. 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.

Signed by:



Derek Jansen (Vice President)