

Natural Resources Canada

Public Opinion Research on Energy Issues – Winter 2014–15: Qualitative and Field & Tabulation Research Services

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Executive Summary

NRG Research Group was contracted by Natural Resources Canada to conduct a national qualitative research study and a survey of 3000 Canadians across Canada to gain insight into Canadian general public awareness and perceptions about a range of energy issues and attitudes toward various potential directions or approaches.

The focus groups were conducted between January 29 and February 7, 2015, while the survey was fielded from February 3 to 16, 2015.

This report includes a summary and analysis of findings from the focus group component of the research and a discussion of the methodological practices and approaches used in the field and tabulation data collection exercise.

Background

Energy issues have received increasingly greater media and public attention over the past year driven especially by the oil sands, pipelines, and shale gas. Among the specific issues receiving notable attention are oil sands and environmental monitoring; the European Union's Fuel Quality Directive; pipeline issues (including Keystone XL, Northern Gateway, Energy East, Alaska Pipeline, and safety concerns in general); offshore oil and gas exploration and regulation; Arctic resource development; First Nations process; calls for a national energy strategy, and the changing unconventional natural gas paradigm in North America.

Natural Resources Canada (NRCan) last conducted comprehensive public opinion research on energy issues in the spring/summer of 2014, with a focus on awareness, understanding and attitudes toward energy production and use in Canada, and the balance between energy and the environment.

In this current project, NRCan sought to stay abreast of these issues with quantitative (telephone survey data) and qualitative (focus group) research.

Research objectives

The Government of Canada seeks to maintain a clear and current understanding of Canadian public opinion on a wide range of energy issues as a basis for ongoing and future broad-based consultations relating to energy policy in Canada.

Results of this research will inform ongoing and future policy development, communications and public engagement on many facets of energy policy in Canada.

Qualitative research

The qualitative component consisted of 14 focus groups in seven cities across the country, as follows:

Location	Date '15	Language	Lower/Mid Income	Higher Income	# of Participants
North Vancouver, BC	January 29	English	1	1	17
Kamloops, BC	January 31	English	1	1	18
Calgary, AB	February 2	English	1	1	17
Mississauga, ON	February 3	English	1	1	16
Kitchener/Waterloo, ON	February 4	English	1	1	17
Moncton, NB	February 5	English	1	1	15
Quebec City, PQ	February 7	French	1	1	17

The research was conducted among adults 18 years of age and over. In total, seven involved lower income individuals (defined as a single-person household with income less than \$75K or a multiple-person household with income less than \$100K) and eight involved higher income individuals (defined as a single-person household with income greater than \$75K or a multiple-person household with income greater than \$100K).

Participants were asked for written consent for all sessions to be videotaped and audio-taped. All participants were given an honorarium of \$75 in appreciation of their time and to encourage full attendance.

Participants were recruited at random from the general population residing in the city where the groups were conducted. The sample frame was developed and the recruitment of participants managed by NRG for the various group locations. A screening instrument developed jointly by NRG and NRCan was used to qualify individuals for the study. The screening instrument can be found in the appendices of this report.

Each group with up to 10 participants lasted approximately 1.5 to 2 hours and was moderated by a trained research professional. Andrew Enns with NRG moderated all the groups except for those held in Quebec City. Nadia Papineau-Couture moderated the Quebec City groups, which were conducted in French. The groups were moderated using a prepared discussion guide developed jointly by NRG and NRCan, which can be found in the appendices.

For the purposes of this report, it is important to note that focus group research is a form of scientific, social, policy and public opinion research. Focus groups are designed to elicit the full range of ideas, attitudes, experiences and opinions of a selected sample of participants on a defined topic. Findings from qualitative research should be considered directional, and results should not be projected as representative of the entire Canadian population.

Quantitative phase

On behalf of Natural Resources Canada, NRG conducted 3000 10-minute, computer-assisted telephone interviews (CATI) with a random sample of Canadians 18 years of age and over. Households were randomly selected at the household level, and respondents were further randomized using the last birthday method.¹ On February 2, 2015, 20 pretest interviews were conducted. All other interviews were conducted from February 3 to February 16, 2015. The sample was stratified, to ensure meaningful data and analysis at the provincial level, with an oversample of 575 in the province of British Columbia (19% of the interviews vs. 13% of the national population). The data are statistically weighted by region, gender and age according to the most recently available Census information (2011). The margin of error (MOE) for the overall survey sample is +/-1.8 percentage points, 19 times out of 20, at a 95% confidence level (CI). Please note that the MOE is greater for subgroups of the overall sample.

A more detailed description of the methodology is presented in the appendices, along with a copy of the questionnaire.

Qualitative – Key findings

Top of mind, focus group participants were most preoccupied with economic-related issues. Topics such as jobs, the state of the economy and cost of living were frequently mentioned as being areas on which the Government of Canada should focus.

Natural resource or environmental issues were not as a high a priority for participants in terms of requiring government action. There was awareness of the decline in oil prices and the implications this may have for the country's economy, but any concern about this was tempered by the positive impact for consumers of lower gasoline prices.

Participants supported measures and actions to protect Canada's environment, but these tended to be actions that were more local and personal in nature—more recycling, less product packaging and increased use of public transport. There was not much support among participants for the introduction of measures such as a carbon tax. There was a sentiment that this type of measure would not do much to help the environment and only serve to further challenge household budgets.

In most focus groups, pipelines were not mentioned as an issue by participants but generated some discussion when the topic was introduced. The primary issue with pipelines related to safety and what would happen in the case of a spill. As part of this conversation, there were also strong views expressed that pipelines are the safest mode of transporting oil and gas, particularly in comparison to transporting this product by rail.

¹ This method selects an adult (person 18 years of age or older) member of each selected household that celebrated their birth last or most recently to respond to the survey questionnaire.

Political Neutrality Statement

NRG Research Group certifies that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, and standings with the electorate or ratings of the performance of political party or its leaders.



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The total contract value of the research was \$164,437.42 (including HST).

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