

Final Report

Public Opinion Research on Natural Resources Issues 2018

Prepared for: Natural Resources Canada

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Ce rapport est aussi disponible en français.

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Executive summary

Phoenix Strategic Perspectives (Phoenix SPI) was commissioned by Natural Resources Canada (NRCan) to conduct public opinion research with Canadians on natural resources issues. This research was conducted to assess, through qualitative and quantitative methodologies, Canadian public opinion on a range of natural resource issues. 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

To meet the research objectives, qualitative and quantitative research was conducted with Canadians. This included a series of 10 in-person focus groups in five locations across Canada and an 11-minute random digit dial (RDD) telephone survey of 2,200 Canadians, 18 years of age or older.

Qualitative Research

Ten in-person focus groups were conducted between January 24th and February 1st, 2018. Two sessions were conducted in each of the following cities: Mississauga, Chicoutimi (French), Victoria, Edmonton, and Moncton. Participants were Canadians between 18 and 74 years of age. The groups were segmented by household income. The first group in each city was conducted with Canadians from lower and middle household incomes and the second group was conducted with Canadians from higher incomes. Five to eight participants took part in each group. In all, 76 Canadians attended the 90-minute focus groups. In appreciation of their time, participants received an \$100 honorarium. This phase of the research was qualitative in nature and, as such, the results provide an indication of participants' views about the issues explored, but they cannot be generalized to the full population of members of the general public.

Quantitative Research

An 11-minute random digit dial (RDD) telephone survey was conducted with 2,200 adult Canadians from March 5-25, 2018. An overlapping dual-frame (landline and cell phone) sample was used to minimize coverage error. Interviewing was conducted by Elemental Data Collection (EDCI) using computer aided telephone interviewing (CATI) technology. The margin of error for this sample is $\pm 2.3\%$, at a 95% confidence level (adjusted for stratified sampling). The survey data has been weighted by region, age and gender to ensure results that are representative of the Canadian population. Population figures from Statistics Canada 2016 Census were used to construct the weights. More information about the methodology can be found in Annex 2b.

Key Findings

Qualitative Research

Top of mind impressions about Canada's natural resources

Forests, forestry and wood were words mentioned most often by participants when thinking of Canada's natural resources, followed less commonly by water and oil and gas. Mentions also included words used to describe revenue generation, depletion and governance. Some participants described Canada's natural resources as nature and offered expressions of its abundance in Canada.

Most important natural resource issues facing Canada

Participants collectively identified a range of important natural resource issues, with clean water receiving the most mentions, followed by overexploitation and depletion of natural resources, with many noting the importance of conservation and proper remediation. Other mentions included concerns about global competitiveness and trade barriers, foreign ownership of natural resources, clean energy, and post-consumer waste.

Importance of natural resource industries to Canada's economy

There was a consensus that natural resource industries are important to Canada's economy. Reasons given included their importance as drivers of the economy, the abundance of Canada's resources, and international demand.

Resource industries currently seen as most important include forestry and oil/oil sands, followed by mining and hydro-electricity. Looking ahead 20 years, participants anticipate a growth in the importance of solar and, to a lesser extent, wind power. A couple of participants in a number of groups also noted the potential for the increased use of nuclear energy and a decrease in the importance of mining, forestry, and oil/oil sands.

Most common suggestions of how the Government of Canada could support renewable energy industries were through research and development funding, subsidies and incentives for companies investing in these sectors, as well as incentives to citizens to motivate them to switch to alternative energy sources.

Commitment to minimizing environmental impacts

More participants felt that industries are committed to minimizing the environmental impact of their operations. Some added that they, nevertheless, have little awareness of concrete actions taken by industry. In addition, some observed that pressure from environmental groups and the public, as well as government regulation and oversight, has made it necessary for industries to demonstrate their commitment. Those who felt that industries are not committed believe they are more inclined to prioritize profits over minimizing the environmental impact of their operations.

There was a general impression that the Government of Canada is committed to developing Canada's natural resources in a way that minimizes the impact on the environment. Some, however, felt that the Government of Canada would not abandon traditional resource sectors because the economic price to pay is too high.

Most important environmental issues

Climate change and issues related to climate change led the way as the environmental issues participants felt the Government of Canada should focus on most. Reasons offered to explain the importance of environmental issues suggested the perception that climate change is an all-pervasive phenomenon that touches every aspect of life on the planet. Water availability/quality, water/air/soil pollution, and, to a lesser extent, post-consumer waste were also identified as environmental priorities.

Changes in energy use

A number of participants suggested little had changed in their energy use over their lifetime. Changes mentioned included purchasing energy efficient appliances and light bulbs as well as generally using less heat and air conditioning. A small number mentioned biking, carpooling or taking public transportation, installing heat pumps, or upgrading insulation, windows and doors.

Transition to a low carbon economy

The expression most preferred in describing Canada's transition to a low-carbon economy was 'Transitioning from fossil fuels to renewables'. The most common reason given was the wording suggested the transition would be gradual. The expression most likely to be disliked was 'Phasing out fossil fuels' because it was seen as too drastic, with no replacement identified.

When discussing a transition to a low carbon economy, participants often had difficulty identifying the positive and negative impacts on themselves personally, with many suggesting these would only affect future generations. The most frequently identified positive benefits generally included better health, a healthier environment, and new jobs in new industries. Most frequently identified drawbacks included increased direct and trickle-down costs and loss of jobs in traditional resource sectors.

Government of Canada Collaboration

Participants tended to have difficulty assessing the extent to which the Government of Canada works collaboratively with provincial and territorial governments, Indigenous Peoples, and other countries. In fact, many said that they simply do not know. Many assumed that such collaborative work does take place, but that the details of such interactions were not well-known.

Quantitative Research

Most important natural resources issue facing Canada

No natural resources issue was mentioned by respondents with any significant frequency. However, the top issues, mentioned by 11% of respondents, were *making sure we have enough resources for future generations, protecting forests, lakes, habitats, and water pollution/contamination.*

Government of Canada performance

On average, one-third of Canadians think the Government of Canada is doing a good job managing Canada's natural resources. Specifically, between three in 10 and four in 10 Canadians indicated they felt the federal government is doing a good job in each of the five areas assessed. The areas that were assessed most positively include making sure natural resources are developed in a way that respects the environment (39%), ensuring Canada's natural resources are developed in a way that creates economic growth (37%), and working collaboratively with provincial and territorial governments (36%).

Current importance of natural resources industries

With regards to the importance of natural resource industries to the Canadian economy, Canadians were most likely to attribute importance to hydro-electricity (78%) and forestry (75%). This was closely followed by oil, which was identified as important by seven in 10 Canadians. Canadians were least likely to view nuclear energy (37%) as an important driver of Canada's economy.

Perceived future importance of natural resources industries

When asked to look ahead and consider which natural resource industries will increase in importance to Canada's economy, most Canadians pointed to solar power (81%), followed by wind power (70%). Just over half (58%) mentioned hydro-electricity. In contrast, 44% of respondents think the importance of the oil industry will decrease.

Preferred priorities for guiding decisions about Canada's energy future

When asked what should *most* guide decisions about Canada's energy future, three in 10 (29%) Canadians said that *reducing greenhouse gas emissions* should be the guide. This was followed by *keeping energy affordable* (26%) and *making sure our energy is produced, transported and used safely* (21%). Approximately one in 10 pointed to *generating more energy-related jobs* (12%) and *getting our energy products to market* (10%) as preferred priorities.

Views on nuclear, wind and solar power

Increasing the use of solar power was seen by most Canadians (78%) as a way to help with cleaner air in Canada. Furthermore, 70% said that increasing the use of wind power would help. Conversely, fewer than one in three (27%) Canadians felt that increasing the use of nuclear power would help with cleaner air.

Affordability of energy for use in homes in Canada

The majority of Canadians perceived natural gas to be the most affordable energy used in homes (79%). Hydroelectricity followed, with seven in 10 respondents perceiving it to be somewhat or very affordable. Just over half of Canadians considered solar (59%), oil (55%), and wind (55%) to be somewhat or very affordable energy sources. Conversely, the plurality (44%) said that nuclear is not very or not at all affordable.

Additional Information

Contract value:

The contract value was \$157,780.21 (including applicable taxes).

Statement of Political Neutrality:

I hereby certify as a Senior Officer of Phoenix Strategic Perspectives 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 contain any reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leader.



Alethea Woods
President
Phoenix Strategic Perspectives Inc.

Detailed Findings: Qualitative Research

Top of mind impressions about Canada's natural resources

Forests, forestry, lumber, and wood were words mentioned most often by participants when thinking of Canada's natural resources, followed less commonly by references to water and oil and gas. A number of participants used words to describe the value of natural resources in terms of wealth/revenue generation, and the vastness of Canada's natural resources. Finally, the words diminished or exploited came to mind to a few when thinking of Canada's natural resources.

Most important natural resource issues facing Canada

Participants collectively identified a range of important natural resource issues, with clean water receiving the most mentions, followed by overexploitation and depletion of natural resources, with many noting the importance of conservation and proper remediation. A host of other issues was mentioned less frequently, including concerns over global competitiveness and trade barriers, foreign ownership of natural resources, developing export markets, clean energy, post-consumer waste, air quality, global warming/climate change, carbon emissions and greenhouse gases, working with Indigenous People regarding resource development, and enforcement of government environmental regulations.

Importance of natural resource industries to Canada's economy

There was a consensus that natural resource industries are important to Canada's economy. Reasons given included their importance as drivers of the economy, the abundance and variety of Canada's resources, and the international demand for Canada's resources.

Resource industries currently seen as most important include forestry and oil/oil sands, followed by mining, hydro-electricity, and natural gas. Reasons offered by participants for their perceived importance were that Canada is rich/abundant in all of them, that each one is a huge domestic employer, and that there is a strong demand/need internationally for these resources.

Looking ahead 20 years, participants anticipate a growth in the importance of solar power, followed, to a lesser extent, by wind power. A couple of participants in a number of groups also noted the potential for the increased use of nuclear energy. Conversely, participants anticipated a decrease in the importance of mining, forestry, and oil/oil sands due mainly to reduced supply and/or demand and heightened environmental concerns. The main reasons provided by participants to explain the increased importance of solar and wind power were similar. Both were generally described as environmentally friendly, renewable, and sustainable, and it was noted that both are already being developed and being advanced further through research and development. A few felt wind power was currently less reliable, with a couple noting that wind farms are large, visually unappealing and/or noisy.

Key points regarding other resource industries in 20 years included the following:

- Mining: Some felt mining would remain important and any decrease in importance will be comparative rather than absolute.

- **Forestry:** Forestry was also expected to remain an important resource industry in Canada. While some suggested forestry is a renewable resource, others mentioned the effects of clear-cutting, climate change and invasive species like the emerald ash borer or spruce budworm may result in a loss of forests.
- **Oil/oil sands:** Oil and the oil sands development was seen by some as not sustainable because of the volatility of oil prices, the price required to make its development economically feasible, the environmental costs associated with its development, and the reality that it is a non-renewable resource.
- **Natural gas:** Natural gas was seen as remaining important in the future, in part as a replacement for oil, but also because of perceived technological advances rendering its development more cost effective.
- **Hydro-electricity:** Hydro-electricity was perceived as remaining important in the future because it was considered by many as sustainable, and because more dams are being built.
- **Nuclear energy:** Nuclear energy was described by a few as very efficient and becoming cleaner and safer as a result of research and development (R&D).

The most common ways in which participants felt the Government of Canada could support renewable energy industries included through R&D development funding, subsidies and incentives for companies investing in these sectors, and incentives to citizens to motivate them to switch to alternative energy sources. Measures identified less frequently included the following:

- Investing in new clean technologies.
- Leading by example through adoption of energy efficiency and clean energy solutions in crown property and other assets.
- Increasing public awareness of new and emerging technologies.
- Helping industries in new energy sectors find markets and encourage manufacturing spin-offs.
- Providing funding for renewable energy sector job training.
- Updating building codes
- Taxing less efficient energy sources.

Commitment to minimizing environmental impacts

Most participants felt that industries are committed to minimizing the environmental impact of their operations, though some added that they have little awareness of concrete actions taken by industry. Some observed pressure from environmental groups and the public, as well as government regulation and oversight, has made it necessary for industries to demonstrate their commitment. Those who feel that industries are not committed believe they are more inclined to prioritize profits over minimizing the environmental impact of their operations.

There was a general impression that the Government of Canada is committed to developing Canada's natural resources in a way that minimizes the impact on the environment. Some, however, felt that the Government of Canada would not abandon traditional resource sectors the economic price to pay is too high.

Most important environmental issues

Climate change and issues related to climate change led the way as the environmental issues participants felt the government should focus on most. The most frequently given reason to explain its importance was the perception that climate change is an all-encompassing phenomenon that touches every aspect of life on the planet. Other mentions included water availability/water quality, water/air/soil pollution and, to a lesser extent, post-consumer waste.

Measures participants think the Government is taking to address this issue included setting targets for reduction in carbon emissions, creating a carbon tax, and signing the Paris Agreement.

Changes in energy use

While a number of participants suggested little has changed in their energy use over their lifetime, at least some participants in every group identified changes they have taken regarding their own energy use. Routinely identified measures include the following:

- Purchasing energy-efficient appliances and light bulbs
- Using less heat and air conditioning
- Installing a heat pump
- Upgrading insulation

Measures identified less frequently included the following:

- Installing energy efficient windows and doors
- Using energy during off-peak hours
- Installing smart thermostats
- Biking, carpooling and taking public transportation.

Other mentioned measures related to recycling. A few suggested their energy use had increased over time.

Transition to a low carbon economy

Participants were presented with a list of ways people might describe Canada's approach in working towards a low-carbon economy. The expressions were:

- "Phasing out fossil fuels"
- "Transitioning from fossil fuels to renewables"
- "Moving from fossil fuels to renewables"
- "Diversifying our energy mix"
- "Adding renewables to our energy mix"

Below is feedback regarding each of these expressions.

Transition from fossil fuels to renewables

This expression was most preferred in describing Canada's transition to a low-carbon economy.

Positive: Participants who liked this expression said it sounded like a more gradual transition, thoughtful, practical, and done right. Some who liked this expression found it less threatening, more collaborative and felt it suggested there would be a plan and structures put in place to help Canadians adapt.

Negative: Those who did not like the expression suggested it sounded too bureaucratic, and that the meaning of the words "transition" and "renewables" were not clear. Others did not like the implication of discontinuing fossil fuel availability.

Diversifying our energy mix

Participants also liked this expression.

Positive: Many participants liked the expression because it did not suggest a discontinuation of fossil fuel usage. Other positive comments were that it sounded positive, non-threatening and realistic.

Negative: Those who said they did not like the expression felt the meaning of the words "diversifying" and "energy mix" were too ambiguous. Others said the expression belittled the drastic change that is set to take place.

Moving from fossil fuels to renewables

Fewer participants found this expression appealing.

Positive: Some participants liked the expression because it sounded as though fossil fuels would continue to form part of Canada's energy mix. In addition, to a couple of participants, "moving" sounded like infrastructure is already in place. Finally, a few felt the language was less complex.

Negative: Some participants felt the expression was too harsh and insisted that fossil fuels were here to stay, while others felt more immediate action was required to eliminate the use of fossil fuels.

Adding renewables to our energy mix

Very few participants said they liked this expression.

Positive: While some liked that the expression sounded action-oriented, positive, realistic, and softer, some felt it implied adding to and not replacing fossil fuels.

Negative: Those who did not like the expression felt it made it sound as if renewables are not already a part of Canada's energy mix. Some did not like that it did not suggest reducing Canada's dependence on fossil fuels. In addition, a couple of participants did not like it because they felt it implied adding even more renewables to the current energy mix (something they did not favour).

Phasing out fossil fuels

Very few participants liked this expression.

Positive: Those who like the expression said that it needs to be done, that it sounds about right, and that Canada needs to eliminate fossil fuels from its energy mix.

Negative: Those who did not like the expression said it was going too far to suggest the elimination of fossil fuels. They felt Canada's climate is too harsh and that renewables would be unreliable in fulfilling Canada's energy needs. A couple suggested that even renewables could create environmental issues.

Participants often had difficulty identifying the positive and negative impacts of a transition to a low carbon economy on themselves personally, with many suggesting that the real impacts would not affect them but the next generation.

For some, the thought of a low-carbon economy brought a sense of well-being and optimism in Canada's future. The most frequently identified positive benefits included better health, a healthier environment, and the creation of new jobs in new industries. A few suggested that electric vehicles would become more affordable and there would be less driving and less traffic.

For others, the unknowns of a low-carbon economy brought some anxiety. The most frequently identified negative impacts included both direct and trickle-down costs, mentions of job losses in traditional resource sectors, as well as inconveniences to their current lifestyles. A couple suggested renewable and energy efficient equipment would create more waste disposal issues.

Government of Canada Collaboration

Participants tended to have difficulty assessing the extent to which the Government of Canada works collaboratively with provincial and territorial governments, Indigenous Peoples, and other countries. In fact, many said that they simply do not know what is taking place between the Government of Canada and these actors. Many assumed that such collaborative work does take place, but that the details of such interactions are not well known to members of the general public.

Below is feedback regarding each of these areas of collaboration.

Collaboration between Government of Canada and provincial/territorial governments

Examples of collaboration between the Government of Canada and provincial governments included working on pipeline issues and intergovernmental meetings following the signing of the Paris Agreement.

Perceived barriers/challenges to this type of collaboration included jurisdictional issues between federal and provincial governments, provinces having different/conflicting agendas/priorities and different degrees of power/influence, and both levels of government being approached by various lobbying and advocacy groups with differing agendas.

Collaboration between Government of Canada and Indigenous Peoples

Examples of collaboration included the Government of Canada consulting with Indigenous Peoples regarding resource development issues and the establishment of commissions of inquiry.

Perceived barriers/challenges to this type of collaboration included possible mistrust of the Government of Canada by Indigenous Peoples, Indigenous Peoples face other important issues/immediate priorities (e.g. clean water, housing, health), possible conflict between a desire to develop natural resources and the desire to maintain a traditional lifestyle, and issues related to devolution of power from the Government of Canada to Indigenous Peoples.

Collaboration between Government of Canada and other countries

Examples of collaboration between the Government of Canada and other countries included the Paris Agreement as well as ongoing summits/international meetings.

Perceived barriers/challenges to this type of collaboration included difficulty establishing agreement/consensus between so many actors, different perceptions of national interest at play between countries, concerns over protecting national sovereignty, countries being at different levels of economic and technological development, and Canada having limited influence on the international stage.

Detailed Findings: Quantitative Research

Most important natural resources issue facing Canada

Canadians were asked, without prompting, to identify the most important issue facing Canada today when it comes to natural resources. A wide range of issues was offered, from environmental stewardship to economic concerns, but none was mentioned with any significant frequency. The top issues, each mentioned by 11% of respondents, were *making sure we have enough resources for future generations*, *protecting forests, lakes, habitats* and *water pollution/contamination*. All other issues were mentioned by fewer than one in 10 respondents, as illustrated in the table below.

Table 1: Important natural resources issues facing Canada

Issues	%
Making sure we have enough resources for future generations	11%
Protecting forests, lakes, habitat	11%
Water pollution/contamination	11%
Pipeline approval/need for construction	6%
Air pollution/emissions	5%
Marketing our natural resource products	5%
Pipelines/oil spills/environmental impact	4%
Oil issues/ pipelines (unspecified)	4%
Climate change	4%
Energy costs	3%
Reliable energy supply	3%
Trade issues with US	3%
Forestry issues	2%
Economic/trade issues	2%
More jobs in natural resources	2%
Softwood lumber	1%
Low oil prices	1%
Fracking	<1%
Protecting agricultural land	<1%
Other	3%

Base: n=2,200 (all respondents)

Q1: In your view, what is the most important issue facing Canada today when it comes to our natural resources?

Don't know/no response: 19%

Among the top issues cited, the most pronounced subgroup differences related to region. The likelihood of identifying adequate resources for future generations was higher in the North, Atlantic Canada, British Columbia, and Ontario than it was in Quebec and Alberta. Those in Atlantic Canada, Ontario, and British Columbia were more likely to mention protecting forests, lakes and habitat than those in Quebec and Alberta. As well, the likelihood of citing water pollution was lower in British Columbia and Alberta than elsewhere in the country, while Albertans were the most apt to view pipeline approval as the top issue facing Canada.

Government of Canada performance

Canadians are divided when it comes to perceptions of the Government of Canada’s performance on specific aspects of natural resource management. Between three in 10 and four in 10 Canadians said the federal government is doing a good job in each of the areas they were asked to assess. In all but area, working with the Indigenous People of Canada, Canadians who did not provide a positive rating of government performance were more likely to be neutral than to rate performance as poor.

Areas that were assessed most positively include ensuring that natural resources are developed in an environmentally-responsible manner (39%) and in a way that creates economic growth (37%), as well as working collaboratively with provincial and territorial governments (36%).

Table 2: Government of Canada Performance in Specific Areas

Areas	10-point scale 10=very good job 1=very poor job		
	%	%	%
	7-10 Good	5-6 Neutral	1-4 Poor
Making sure natural resources are developed in a way that respects the environment	39%	35%	23%
Ensuring Canada’s natural resources are developed in a way that creates economic growth for the entire country	37%	34%	26%
Working collaboratively with the provincial and territorial governments to support an economically strong and environmentally sound energy future for Canada [SPLIT SAMPLE]	36%	34%	27%
Working collaboratively with the Indigenous People of Canada to support an economically strong and environmentally sound energy future for Canada [SPLIT SAMPLE]	31%	29%	33%
Providing opportunities for Canadians to participate in consultations on energy and natural resource projects	29%	33%	31%

Base: n=2,200 (all respondents) Split Base: n=1106 and 1094
 Q2: Rate the performance of the Government of Canada in each area...?
 Don't know/no response: 2%-7%

On the issue of economic growth and working collaboratively with the provincial and territorial governments, respondents from Quebec and Ontario were more likely to provide positive performance ratings. When it comes to developing Canada’s natural resources in a way that respects the environment and providing opportunities to participate in consultations, respondents from the North were less likely than Canadians elsewhere in the country to say the Government of Canada is doing a good job.

The likelihood of rating Government of Canada performance as good across all these areas was higher among Canadians under 35 years of age and those with annual household incomes of under \$40,000. In addition, those living in rural communities were less likely than those from larger communities to rate Government of Canada performance as good when it comes to developing Canada’s natural resources in a way that creates economic growth for the entire country and to providing opportunities for Canadians to participate in consultations.

Current importance of natural resource industries

In terms of the importance of natural resource industries to the Canadian economy at this time, Canadians were most likely to point to hydro-electricity (78%) and forestry (75%). Following this, seven in 10 pointed to the oil industry, while two-thirds rated the natural gas industry as important. Slightly more than half of Canadians surveyed said the mining (58%), solar power (58%), and wind power (53%) industries are important drivers of Canada's economy. In contrast, fewer than four in 10 (37%) think that the nuclear energy industry is important to Canada's economy at this time.

Table 3: Important Industries to Canada's Economy

Industries	10-point scale 10=extremely important 1=not at all important		
	% 7-10 Important	% 5-6 Neutral	% 1-4 Not important
Hydro-electricity	78%	13%	8%
Forestry	75%	17%	7%
Oil	70%	17%	12%
Natural gas	67%	21%	9%
Mining	58%	25%	13%
Solar power	58%	20%	20%
Wind power	53%	23%	21%
Nuclear energy	37%	26%	30%

Base: n=2,200 (all respondents)

Q3: How important are each of the following industries to Canada's economy today...?

Don't know/no response: 1%-7%

With the exception of natural gas and nuclear energy, Canadians age 55+ were less likely than younger Canadians to rate these industries as important drivers of Canada's economy.

Regional differences were pronounced in this area. The likelihood of attributing importance to the forestry industry was higher in British Columbia and Ontario. Albertans were least likely to say that hydro-electricity is important, and most apt to point to oil and natural gas as drivers of Canada's economy. The likelihood of attributing importance to mining was higher in Ontario and the western provinces, while residents of Quebec were less likely to attribute importance to solar power. Wind power was more likely to be viewed as an important driver of the economy in Atlantic Canada, and nuclear energy was most apt to be viewed as important in Ontario.

Perceived future importance of natural resources industries

Looking ahead, Canadians were most likely to point to solar (81%) and wind power (70%) as industries that will increase in importance to Canada's economy. This is followed, at a distance, by hydro-electricity (58%). Conversely, more than four in 10 (44%) Canadians think the importance of the oil industry will decrease.

Table 4: Industries likely to Increase in Importance to Canada's Economy

Industries	Increase	Decrease	Stay the Same
Solar power	81%	7%	11%
Wind power	70%	11%	16%
Hydro-electricity	58%	9%	31%
Natural gas	44%	22%	32%
Forestry	37%	24%	38%
Nuclear energy	34%	35%	26%
Oil	31%	44%	23%
Mining	25%	36%	35%

Base: n=2,200 (all respondents)

Q4: Do you think the importance of these same industries to Canada's economy will increase, decrease, or stay the same...?

Don't know/no response: 1%-5%

Respondents who live in Manitoba and Saskatchewan were more likely than those who live in Ontario to say the importance of the hydro-electricity industry will increase. Additionally, those with university degrees were more likely to say this than those with post-graduate degrees, as were Canadians living in urban areas. Residents of Quebec were most likely to say the importance of the oil industry will decrease.

Preferred priorities for guiding decisions about Canada's energy future

Roughly three in ten (29%) Canadians felt that *reducing greenhouse gas emissions* should guide decisions about Canada's energy future. This was followed by one-quarter (26%) saying *keeping energy affordable*. Additionally, one in five (21%) said *making sure our energy is produced, transported and used safely* should guide energy-related decisions. Much smaller proportions of respondents cited *generating more energy-related jobs* (12%) and *getting our energy products to market* (10%) as preferred priorities for guiding decisions about Canada's energy future.

Table 5: Priorities for Guiding Decision about Canada's Energy Future

Priorities	%
Reducing greenhouse gas emissions	29%
Keeping energy affordable	26%
Making sure our energy is produced, transported and used safely	21%
Generating more energy-related jobs	12%
Getting our energy products to market	10%

Base: n=2,200 (all respondents)

Q5: Which one of the following do you think should most guide decisions about Canada's energy future?

Don't know/no response: 2%

Respondents from Quebec, women, as well as those from urban locations were more likely to prefer that *reducing greenhouse gas emissions* guide decisions about Canada's energy future. In addition, the likelihood of preferring that this be a priority increased with education levels. Residents of Ontario and Manitoba/Saskatchewan were more likely to prefer that *affordability* guide decisions about Canada's energy future, while support for *getting our energy products on the market* was higher in Alberta. Canadians with post-graduate degrees were more likely to feel that *generating more energy-related jobs* should be a priority when it comes to decisions about Canada's energy future.

Views on nuclear, wind and solar power

Most Canadians (78%) agreed that increasing the use of solar power in Canada would help with cleaner air. Additionally, seven in 10 (70%) felt that increasing the use of wind power would help. Fewer than three in 10 (27%) Canadians felt that increasing nuclear power would help with cleaner air in Canada.

Table 6: Views on Nuclear, Wind and Solar Power

Views	10-point scale 10=strongly agree 1=strongly disagree		
	% 7-10	% 5-6	% 1-4
<i>If we are to have cleaner air, we should increase the use of solar power in Canada</i>	78%	13%	8%
<i>If we are to have cleaner air, we should increase the use of wind power in Canada</i>	70%	16%	13%
<i>If we are to have cleaner air, we should increase the use of nuclear power in Canada</i>	27%	24%	45%

Base: n=2,200 (all respondents)

Q6: To what extent do you agree or disagree with the following statements...?

Don't know/no response: 1%-4%

Women and Canadians under 55 years of age were more likely to agree that an increase in the use of solar power is needed for cleaner air. As well, Atlantic Canadians, those living in urban locations, and women were more likely to say that increasing wind power is needed for cleaner air.

Affordability of energy for use in homes in Canada

The majority of Canadians surveyed felt that natural gas is the most affordable energy used in homes. Four in five (79%) said it is somewhat or very affordable. Following this, seven in 10 (70%) rated hydro-electricity as somewhat or very affordable. Just over half of Canadians considered solar (59%), oil (55%), and wind (55%) to be somewhat or very affordable energy sources. Conversely, the plurality (44%) said that nuclear is not very or not at all affordable.

Table 7: Affordability of Energy Sources

Energy	Very Affordable	Somewhat Affordable	Not Very Affordable	Not at all Affordable
<i>Natural gas</i>	28%	51%	12%	4%
<i>Hydro-electricity</i>	26%	44%	20%	8%
<i>Solar</i>	24%	35%	25%	9%
<i>Wind</i>	22%	33%	23%	10%
<i>Oil</i>	15%	41%	30%	10%
<i>Nuclear</i>	10%	26%	23%	21%

Base: n=2,200 (all respondents)

Q7: Would you say the following are very, somewhat, not very or not at all affordable?

Don't know/no response: 3%-21%

Residents of Atlantic Canada and Quebec were less likely to say natural gas is affordable, while respondents in Ontario were less apt to feel that hydro-electricity is affordable. The likelihood of saying that solar power is affordable was higher among residents of Atlantic Canada and British Columbia. Residents of Alberta were more likely to say that oil is affordable, while those in Ontario were more apt to say this about nuclear energy.

Demographics

Table 8: Education

Education	%
Grade 8 or less	2%
Some high school	6%
High school diploma or equivalent	20%
Registered Apprenticeship or other trades certificate or diploma	3%
College, CEGEP or other non-university certificate or diploma	24%
University certificate or diploma below bachelor's level	11%
Bachelor's degree	21%
Post graduate degree above bachelor's level	13%

Table 9: Income Level

Income level	%
Under \$20,000	8%
\$20,000 to just under \$40,000	13%
\$40,000 to just under \$60,000	14%
\$60,000 to just under \$80,000	14%
\$80,000 to just under \$100,000	11%
\$100,000 to just under \$150,000	15%
\$150,000 and above	15%

Table 10: Employment Status

Employment status	%
Working full-time, that is, 35 or more hours per week	44%
Working part-time, that is less than 35 hours per week	9%
Self-employed	8%
Unemployed, but looking for work	4%
A student attending school full-time	5%
Retired	25%
Not in the workforce (Full-time homemaker, unemployed, not looking for work)	3%
Other	1%

Table 11: Community

Community	%
<i>A rural area of 5,000 people or less</i>	17%
<i>A rural area of 5,000 to 10,000 people</i>	11%
<i>A town or city of 10,000 to 100,000 people</i>	29%
<i>An urban centre of 100,000 to 500,000 people</i>	18%
<i>And urban centre of 500,000 or more people</i>	23%

Table 12: Language

Language	%
<i>English</i>	72%
<i>French</i>	23%
<i>Another language</i>	11%

Appendix

Annex 1: Qualitative Research Instruments

1a: Recruitment Screener

Specifications

- Recruit 10 participants.
- Participants to be paid \$100.
- 1 group in each location will be held with participants from low/middle income households and the other with participants from high income households.
 - “High income” is defined as anyone with a personal annual income of \$75,000 or more or anyone in a household with multiple incomes with an annual household income of \$100,000 or more. In Moncton and Chicoutimi:
 - a personal income of \$60,000+ counts as “high income” and
 - a household income of \$75,000+ counts as “high income”.
 - “Low/middle” income is defined as anyone with a personal annual income of under \$75,000 or anyone in a household with multiple incomes with an annual household income of under \$100,000.
- The groups in Chicoutimi will be conducted in French and the groups in the other locations will be in English.
- In addition to segmenting the groups by income, all groups will include a mix of participants by age, children in the home, gender, employment status and education.

Questionnaire

A. INTRODUCTION

Hello/Bonjour, my name is [INSERT]. Would you prefer to continue in English or French? /
Préférez-vous continuer en français ou en anglais?

[INTERVIEWER NOTE: FOR ENGLISH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à ces groupes de discussion. Nous vous remercions de votre intérêt." FOR FRENCH GROUP, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this discussion group. We thank you for your interest.]

I'm calling from CRC Research, a Canadian research firm. We're organizing a series of discussion groups on behalf of the Government of Canada to explore current issues of interest to Canadians. The groups will last up to two hours and people who take part will receive a cash gift to thank them for their time.

Participation is completely voluntary. We are interested in your opinions. No attempt will be made to sell you anything or change your point of view. The format is a "round table" discussion led by a research professional with up to eight participants. All opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: "The information collected through the research is subject to the provisions of the *Privacy Act*, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation."]

Before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix of people in each of the groups. This will take 5 minutes. May I continue?

Yes	CONTINUE
No	THANK/DISCONTINUE

B. QUALIFICATION

1. Do you, or any member of your household or immediate family, work in any of the following fields? **READ LIST**

Marketing research, public relations firm, or advertising agency
The media (i.e., radio, television, newspapers, magazines, etc.)
A federal or provincial government department or agency
A political party

Yes	THANK/DISCONTINUE
No	CONTINUE

2. We have been asked to speak to participants from all different ages. May I have your age please? **RECORD AND CLASSIFY**

Under 18	THANK/DISCONTINUE
18 to 24 years	
25 to 34 years	
35 to 44 years	
45 to 54 years	
55 to 64 years	
65 to 74 years	
75 years or older	THANK/DISCONTINUE

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

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

4. How long have you lived in [INSERT CITY]?

Less than two years	THANK/TERMINATE
Two years or more	CONTINUE
Don't know/Refused	THANK/TERMINATE

5. Do you currently have children under the age of 18 living in the house with you? **GET MIX**

Yes
No

6. Including yourself, how many people 18 years of age and over are there in your household?

One	
Two	SKIP TO Q8
Three	SKIP TO Q8
Four or more	SKIP TO Q8

IF ONLY ONE PERSON IN HOUSEHOLD AT Q6, ASK:

7. Which of the following categories best corresponds to your total personal annual income, before taxes, for 2017? **GET MIX**

Under \$20,000	Low/middle income
\$20,000 to just under \$40,000	Low/middle income
\$40,000 to just under \$60,000	Low/middle income
\$60,000 to just under \$75,000	Low/middle income*
\$75,000 to \$100,000	High income
Over \$100,000	High income
REFUSE/DK	TERMINATE

***RECRUIT AS HIGH INCOME IN MONCTON AND CHICOUTIMI.**

IF A MULTIPLE PERSON HOUSEHOLD AT Q6, ASK:

8. Which of the following categories best corresponds to the total annual income, before taxes, of all members of your household, for 2017? **GET MIX**

Under \$20,000	Low/middle income
\$20,000 to just under \$40,000	Low/middle income
\$40,000 to just under \$60,000	Low/middle income
\$60,000 to just under \$75,000	Low/middle income
\$75,000 to \$100,000	Low/middle income*
\$100,000 to \$150,000	High income
More than \$150,000	High income
REFUSE/DK	TERMINATE

***RECRUIT AS HIGH INCOME IN MONCTON AND CHICOUTIMI.**

9. Record gender by observation. **50/50 SPLIT**

Female

Male

ASK ALL

10. Which of the following best describes your employment situation? **CHECK QUOTAS**

- | | |
|-----------------------------------|-------------------------------|
| Working full time (35 hrs. +) | 4 minimum; ASK Q11 |
| Working part time (under 35 hrs.) | 2 maximum; ASK Q11 |
| Homemaker | 1 maximum; SKIP TO Q12 |
| Student | 1 maximum; SKIP TO Q12 |
| Retired | 2 maximum; SKIP TO Q12 |
| Unemployed | 1 maximum; SKIP TO Q12 |

11. What is your current occupation? **RECORD:**

Type of Job: _____

Type of Company: _____

12. Could you please tell me what is the last level of education that you completed? **GET MIX**

- Some High School only
- Completed High School
- Trade School certificate
- Some Post secondary
- Completed Post secondary
- Graduate degree

13. 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...

- | | |
|----------------------|----------------------------|
| Very comfortable | MINIMUM 5 PER GROUP |
| Fairly comfortable | |
| Not very comfortable | TERMINATE |
| Very uncomfortable | TERMINATE |

14. Have you ever attended a discussion group on any topic that was arranged in advance and for which you received money for your participation?

- | | |
|-----|----------------------------|
| Yes | MAXIMUM 3 PER GROUP |
| No | GO Q18 |

15. When did you last attend one of these discussion groups?

- | | |
|--------------------------|------------------|
| Within the last 6 months | TERMINATE |
| Over 6 months ago | |

16. How many discussion groups have you attended in the past 5 years?

Fewer than 5
5 or more

TERMINATE

17. Have you attended a discussion group about natural resources or the environment within the past two years? **[IF YES, THANK/TERMINATE]**

18. 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
No

THANK/TERMINATE
CONTINUE

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

19. The discussion group will be audio/video-recorded. These recordings are used to help with analyzing the findings and writing the report. The results from the discussions will be grouped together in the research report, which means that individuals will not be identified in anyway. Neither your name nor your specific comments will appear in the research report. Is this acceptable?

Yes
No

CONTINUE
THANK/TERMINATE

20. There may be some people from the Government of Canada who have been involved in this project observing the session. They will not take part in the discussion and they will not know your name. Is this acceptable?

Yes
No

CONTINUE
THANK/TERMINATE

C. INVITATION TO PARTICIPATE

I would like to invite you to attend the focus group session where you will exchange your opinions in a moderated discussion with other Canadians from your community. The discussion will be led by a researcher from the national public opinion research firm, Phoenix SPI. The group will take place on **[DAY OF WEEK]**, **[DATE]**, at **[TIME]**. It will last two hours. People who attend will receive \$100 to thank them for their time. Would you be willing to attend?

Yes
No

TERMINATE

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at **[INSERT FACILITY]**. I would like to remind you that the group is at **[TIME]** on **[DATE]**. We ask that you arrive 15 minutes early.

At the facility, you will be asked to produce photo identification, so please remember to bring something with you (for example, a driver's license). If you use glasses to read, please remember to bring them with you. Participants may be asked to review some materials in **[ENGLISH/FRENCH]** during the discussion.

As I mentioned, the session will be audio/video recorded for research purposes and representatives of the Government of Canada research team will be observing from an adjoining room. You will be asked to sign a waiver to acknowledge that you will be video recorded during the session. The recordings will be used only by the Phoenix SPI research team and will not be shared with others. All information collected in the group discussion will remain anonymous and be used for research purposes only in accordance with laws designed to protect your privacy.

As we are only inviting a small number of people to attend, your participation is very important to us. If for some reason you are unable to attend, please call us so that we can get someone to replace you. You can reach us at **[INSERT NUMBER]** at our office. Please ask for **[INSERT NAME]**.

Someone will call you the day before to remind you about the session.

So that we can call you to remind you about the focus group or contact you should there be any changes, can you please confirm your name and contact information for me?

First name: _____
Last Name: _____
Daytime phone number: _____
Evening phone number: _____

1b: Moderator's Guide

Introduction (5 minutes)

- ❑ Introduce moderator and Phoenix
- ❑ Thank participants for attending
- ❑ Explain general purpose of focus groups:
 - Used to gauge *opinions* about policies, issues, ideas, communications, etc.
 - Not a knowledge test; no right or wrong answers (interested in opinions)
 - Okay to disagree; want people to speak up if hold different view
- ❑ Tonight we are conducting research on behalf of Natural Resources Canada (NRCan), a department of the Government of Canada. We'll be talking about issues related to Canada's natural resources.
- ❑ Disclosures:
 - Your participation is voluntary.
 - We're looking for candour and honesty.
 - Your comments will be treated in confidence; reporting is done in aggregate form only.
 - This session is being video recorded. This is for report writing...to verify feedback.
 - There are observers, who work for the Government of Canada, behind the one-way glass (MODIFY LANGUAGE AS NEEDED IN CHICOUTIMI – I.E., CLOSED-CIRCUIT TV). They are here to oversee the research process and to see your reactions first-hand.
- ❑ If you have a cell phone or other electronic device, please turn it off.
- ❑ Any questions? ACCEPT BRIEF QUESTIONS BUT DO NOT LINGER.
- ❑ Roundtable introduction: Please tell us your first name one of your favourite interests or hobbies.

Warm-Up (10 mins.)

1. Using one word, what's the first thing that comes to mind when you think about Canada's natural resources? ENSURE WE HEAR FROM ALL PARTICIPANTS FOR THIS QUESTION BUT KEEP BRIEF
2. In your opinion, what are the most important natural resource issues facing Canada today? What else? USE FLIP CHART. GO THROUGH LIST OF ISSUES NOTING WHICH ARE CONSIDERED MOST IMPORTANT THROUGH A HAND COUNT, AS NEEDED. CHOOSE TOP THREE AND ASK: What makes this important? FOCUS ONLY ON ISSUES WITHIN NRCAN'S MANDATE.

Energy and Natural Resource Industries (30 mins.)

Now let's talk about Canada's energy and resource sector industries. This includes industries like forestry, mining, oil and natural gas.

3. Do you think these industries are important to Canada's economy? What makes you say that?

I'm now going to pass out a sheet of paper that includes a list of industries in the energy and resource sector. I'd like you to review the list and rank the top three industries in each category. The two categories are:

- Industries that are currently important drivers of Canada's economy.
- Industries that will be important drivers of Canada's economy 20 years from now.

GIVE PARTICIPANTS A FEW MINUTES TO COMPLETE THE EXERCISE.

4. Which industries did you identify as being most important to Canada's economy right now? PROBE REASONS FOR INCLUSION.
5. And which industries did you identify as being the most important to Canada's economy 20 years from now?

I'd now like to focus on those industries where there was a change....they ranked higher on one list, but lower on the other. This appears to be the following industries... [INSERT INDUSTRIES]. FOR EACH INDUSTRY, ASK:

6. Why do you think this industry will become [more/less] important 20 years from now? What is your view based on?
7. What kind of steps or actions should the Government of Canada take, if any, to support these industries? Why? Anything else? PROBE TO LINK POTENTIAL ACTIONS WITH SPECIFIC INDUSTRIES THAT PARTICIPANTS THINK SHOULD BE TARGETTED.
8. Do you think Canada's energy and natural resource industries are committed to minimizing their environmental impact? Why do you say that?
9. Do you think the Government of Canada is committed to developing Canada's natural resources in a way that minimizes the impact on the environment? Why do you think that?

The Environment (15 mins.)

Switching focus somewhat,

10. What do you consider to be the most important environmental issues facing Canada today? Anything else? USE FLIP CHART. PROBE FOR SPECIFICS AS NEEDED
11. Thinking about this list of issues, which ones should the Government of Canada focus on the most? That is, which should have highest priority for government attention and action? GO THROUGH LIST GETTING HAND COUNTS, AS NEEDED. ASK THE FOLLOWING QUESTIONS FOR THE TOP ISSUES BUT FOCUS ONLY ON ISSUES WITHIN NRCAN'S MANDATE. ALSO, DO NOT REVISIT ISSUES DISCUSSED PREVIOUSLY WITH RESPECT TO Q2. KEEP DISCUSSION RELATIVELY BRIEF (AVOID TIME TRAP)

- Why is this a priority/what makes this so important?
- To the best of your knowledge, what is the Government of Canada currently doing to address this issue?

Climate Change (25 mins.)

In the last part of our discussion tonight, I'd like to shift the focus from government and industry to a more personal level.

12. In your lifetime, what, if anything, has changed in terms of your own energy use?

PROBE FOR SPECIFICS: use of solar panels, heat pumps, unplugging devices not in use, upgrading insulation and doors, energy efficient appliances, purchasing energy efficient lighting, heated floors, driveways, use of space heaters, upgrade wood fireplaces to gas, upgrade from woodstove/oil to electricity/natural gas, etc.

HAND OUT SHEET

13. On the sheet I've just handed out you'll see a list of ways people might describe Canada's approach in working towards a low-carbon economy. That is, an economy that is less reliant on fossil fuels. Please take a few moments to put a check mark beside expressions you like and an X through ones you do not like or that make less sense to you. Also, if any words or phrases are unclear to you, please put a question mark (?) beside that. When done, I'd also like you to circle the one that BEST resonates with you?

- "Phasing out fossil fuels"
- "Transitioning from fossil fuels to renewables"
- "Moving from fossil fuels to renewables"
- "Diversifying our energy mix"
- "Adding renewables to our energy mix"

GO AROUND TABLE, RECORD WINNERS AND LOSERS. DISCUSS WHY.

14. What impact do you think this will have on you personally? Please identify both positive and negative impacts. Let's begin with the potential [positive/negative] impacts.

15. To what extent do you think the Government of Canada works collaboratively with each of the following ... ROTATE ORDER FROM GROUP TO GROUP

- **Provincial and territorial governments** to support an economically strong and environmentally sound energy future for Canada? Why do you think this? What more could it be doing in this regard? Are there any particular barriers or challenges in this area? If so what?
- **Indigenous Peoples of Canada** to support an economically strong and environmentally sound energy future for Canada? Why do you think this? What more could it be doing in this regard? Are there any particular barriers or challenges in this area? If so what?

- **Other countries** to develop an international approach to energy and natural resource policies? Why do you think this? What more could it be doing in this regard? Are there any particular barriers or challenges in this area? If so what?

Conclusion (5 mins.)

I'm now going to leave the room to check with the observers to see if there are any last questions for you. When I come back, I'm going to ask whether you have any last comments to offer about any of the topics we've discussed.

MODERATOR CHECK WITH OBSERVERS TO SEE IF THERE ARE ANY FINAL QUESTIONS.

**THANK PARTICIPANTS FOR THEIR TIME AND CONTRIBUTION.
BE SURE TO COLLECT ALL MATERIALS/HANDOUTS**

1c: Handouts

From the list of industries in the table below, please rank the three (3) you think are currently the most important drivers of Canada's economy (i.e., first, second, third) and the three (3) you think will be important drivers of Canada's economy 20 years from now.

Industries	Currently Important Rank	Important in 20 Years Rank
Mining industry		
Forestry industry		
Oil or the oil sands		
Natural gas industry		
Hydro-electricity industry		
Solar power industry		
Wind power industry		
Nuclear energy industry		

Please take a few moments to read the following phrases and put a check mark (✓) beside any expression(s) you like and an X beside any expression(s) you do not like. Also, if any words or phrases are unclear to you, please put a question mark (?) beside that.

When you are done that, please circle the one phrase that makes the most sense to you.

- "Phasing out fossil fuels"

- "Transitioning from fossil fuels to renewables"

- "Moving from fossil fuels to renewables"

- "Diversifying our energy mix"

- "Adding renewables to our energy mix"

Annex 2: Quantitative Research Instruments

2a: Questionnaire

[Quebec] "Bonjour/Hello"; [Rest of Canada] "Hello/Bonjour" my name is I'm calling on behalf of Phoenix SPI, a public opinion research company. We are conducting a survey for the Government of Canada on current issues of interest to Canadians. Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

The survey takes about 10 minutes. May I continue?

This survey is voluntary. Your responses will be kept entirely confidential and anonymous and this survey is registered with the Marketing Research and Intelligence Association.

IF ASKED ABOUT THE REGISTRATION, SAY: The survey is registered with the Market Research and Intelligence Association as per Government of Canada standards. The MRIA project registration number is 20180215-239F. The registration system has been created by the Canadian survey research industry to allow the public to verify that a survey is legitimate, get information about the survey industry or register a complaint. The registration system's toll-free telephone number is 1-888-602-6742, extension 8728].

[LANDLINE SAMPLE]

A. We choose telephone numbers at random and then select one person from each household to be interviewed. To do this, we would like to 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 TO QD
No	ASK TO SPEAK TO ELIGIBLE PERSON; REPEAT INTRO

[CELL SAMPLE]

B. Are you in a place where you can safely talk on the phone and answer my questions?

Yes	CONTINUE TO QD
No	ASK QC

C. We would like to conduct this interview with you when it is safe and convenient to do. When would it be more convenient for me to call back?

SCHEDULE CALL-BACK IF POSSIBLE (TIME/DAY): _____

[EVERYONE]

D. Do you, or does anyone in your family or household, work in any of the following areas? [READ LIST]

Advertising or Market Research
The media (i.e. TV, radio, newspapers)

Natural resource industries
The federal government

THANK/DISCONTINUE IF ANY OF THE ABOVE

THANK/DISCONTINUE MESSAGE: "Thank you for your willingness to take part in this survey, but you do not meet the eligibility requirements of this study."

E. In what year were you born?

Record year: _____

F. In which province or territory do you live?

Newfoundland and Labrador
Prince Edward Island
Nova Scotia
New Brunswick
Quebec
Ontario
Manitoba
Saskatchewan
Alberta
British Columbia
Yukon
Northwest Territories
Nunavut

G. RECORD GENDER

Male

To start,

1. In your view, what is the most important issue facing Canada today when it comes to our natural resources? [DO NOT READ; ACCEPT ONE RESPONSE]

Air pollution/emissions
Water pollution/contamination
Protecting forests, lakes, habitat
Energy costs
Reliable energy supply
Trade issues with US
Softwood lumber
Pipelines – PROBE:

Pipeline approval/need for construction
Pipelines/oil spills/environmental impact

The environment/environmental issues – PROBE FOR A SPECIFIC ISSUE
Making sure we have enough resources for future generations

More jobs in natural resources
Marketing our natural resource products
Low oil prices
Climate change
Fracking
Forestry issues
Other (SPECIFY)_____

Don't know
Refused

2. 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? Please use a 10-point scale, where "1" means a very poor job and "10" means a very good job. How about ... [READ]? [ACCEPT DON'T KNOW; DO NOT PROBE FOR A RATING IF THE RESPONDENT VOLUNTEERS THAT THEY DO NOT KNOW.]

[ROTATE]

- a) Making sure natural resources are developed in a way that respects the environment.
- b) Ensuring Canada's natural resources are developed in a way that creates economic growth for the entire country.
- c) Working collaboratively with [SPLIT SAMPLE: the provincial and territorial governments / the Indigenous Peoples of Canada] to support an economically strong and environmentally sound energy future for Canada.
- d) Providing opportunities for Canadians to participate in consultations on energy and natural resource projects.

These next questions are about natural resource industries in Canada.

3. In your opinion, how important are each of the following industries to Canada's economy today? Once again, please use a 10-point scale, where "1" means not important at all and "10" means extremely important. How about ... [READ AND ROTATE] [ACCEPT DON'T KNOW; DO NOT PROBE FOR A RATING IF THE RESPONDENT VOLUNTEERS THAT THEY DO NOT KNOW.]

- a) the mining industry
- b) the forestry industry
- c) the oil industry
- d) the natural gas industry
- e) the hydro-electricity industry
- f) the wind power industry
- g) the nuclear energy industry
- h) the solar power industry

4. Looking ahead 20 years, do you think the importance of these same industries to Canada's economy will increase, decrease or stay the same? How about... [READ AND ROTATE] [ACCEPT DON'T KNOW; DO NOT PROBE FOR A RATING IF THE RESPONDENT VOLUNTEERS THAT THEY DO NOT KNOW.]

- a) the mining industry
 - b) the forestry industry
 - c) the oil industry
 - d) the natural gas industry
 - e) the hydro-electricity industry
 - f) the wind power industry
 - g) the nuclear energy industry
 - h) the solar power industry
5. 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] [ACCEPT DON'T KNOW]
- Keeping energy affordable
 - Generating more energy-related jobs
 - Making sure our energy is produced, transported and used safely
 - Reducing greenhouse gas emissions
 - Getting our energy products to market
6. Using a 10-point scale, where "1" means strongly disagree and "10" means strongly agree, to what extent do you agree or disagree with the following statements: [READ and ROTATE] [ACCEPT DON'T KNOW; DO NOT PROBE FOR A RATING IF THE RESPONDENT VOLUNTEERS THAT THEY DO NOT KNOW.]
- a) If we are to have cleaner air, we should increase the use of nuclear power in Canada.
 - b) If we are to have cleaner air, we should increase the use of wind power in Canada.
 - c) If we are to have cleaner air, we should increase the use of solar power in Canada.
7. Thinking about the kinds of energy that could supply homes in Canada, in your opinion, would you say the following are very, somewhat, not very or not at all affordable? [READ AND ROTATE; ACCEPT DON'T KNOW.]
- a. Oil
 - b. Natural gas
 - c. Hydro electricity
 - d. Wind
 - e. Solar
 - f. Nuclear

The last few questions are for classification purposes only.

8. What is the highest level of formal education that you have completed? [READ LIST IF HELPFUL]
- Grade 8 or less
 - Some high school
 - High School diploma or equivalent
 - Registered Apprenticeship or other trades certificate or diploma

College, CEGEP or other non-university certificate or diploma
University certificate or diploma below bachelor's level
Bachelor's degree
Post graduate degree above bachelor's level
[DO NOT READ] Refused

9. Which of the following categories best describes your total household income in 2017? That is, the total income of all persons in your household combined, before taxes. Please stop me when I get to your category. [READ LIST; STOP WHEN RESPONDENT ANSWERS]

Under \$20,000
\$20,000 to just under \$40,000
\$40,000 to just under \$60,000
\$60,000 to just under \$80,000
\$80,000 to just under \$100,000
\$100,000 to just under \$150,000
\$150,000 and above
[DO NOT READ] Refused

10. Which of the following categories best describes your current employment status? Are you... [READ LIST]

Working full-time, that is, 35 or more hours per week
Working part-time, that is, less than 35 hours per week
Self-employed
Unemployed, but looking for work
A student attending school full-time
Retired
Not in the workforce [FULL-TIME HOMEMAKER, UNEMPLOYED, NOT LOOKING FOR WORK]
[DO NOT READ] Other
[DO NOT READ] Refused

11. How would you describe the community you live in? Is it... [READ LIST until interrupted]

A rural area of 5,000 people or less
A rural area of 5,000 to 10,000 people
A town or city of 10,000 to 100,000 people
An urban centre of 100,000 to 500,000 people
An urban centre of 500,000 or more people

[DO NOT READ] Refused
[DO NOT READ] Don't know

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

English
French
Another language DO NOT SPECIFY

[DO NOT READ] Refused
[DO NOT READ] Don't know

That concludes the survey. This survey was conducted on behalf of Natural Resources Canada, an agency of the Government of Canada. Thank you very much for your thoughtful feedback. It is much appreciated.

2b: Methodological Details

Final Call Dispositions

The table below presents information about the final call dispositions for this survey, as well as the associated response rates (using the Marketing Research and Intelligence Association [MRIA] formula). The MRIA response rate formula is as follows: $[R=R/(U+IS+R)]$. This means that the response rate is calculated as the number of responding units [R] divided by the number of unresolved [U] numbers plus in-scope [IS] non-responding households and individuals plus responding units [R].

	Total	Landline	Cell
Total Numbers Attempted	104,085	22,414	81,671
Out-of-scope - Invalid	64,468	7,862	56,606
Unresolved (U)	24,102	7,823	16,279
<i>No answer/Answering machine</i>	24,102	7,823	16,279
In-scope - Non-responding (IS)	14,536	8,285	6,251
<i>Language barrier</i>	499	253	246
<i>Incapable of completing (ill/deceased)</i>	189	141	48
<i>Callback (Respondent not available)</i>	2,932	752	2,180
<i>Refusal</i>	8,931	4,236	4,695
<i>Termination</i>	314	121	193
In-scope - Responding units (R)	2,650	1,226	1,424
<i>Completed Interview</i>	2,200	1,100	1,100
<i>NQ - Quota Full</i>	15	3	12
<i>NQ - Age</i>	103	3	100
<i>NQ - Industry</i>	332	120	212
Response Rate	7.17%	9.20%	6.02%

The overall response rate was 7.2% (9.2% for the landline sample and 6.0% for the cell phone sample).

Non-response Bias

The potential for non-response bias was assessed by comparing the characteristics of respondents through unweighted and weighted data. The characteristics evaluated were gender and age. As is generally the case, for general population telephone surveys, older individuals (those aged 55+) are overrepresented and younger individuals (those aged under 55) are underrepresented in the survey sample.

2c: A full set of tabulated data

Tabulated data (under separate cover)