

Final Report

Public Opinion Research on Natural Resources Issues 2018 Executive Summary

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.



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