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National Climate Change Adaptation Survey  
Research Report  
Executive Summary

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*Ce rapport est aussi disponible en français.*

## EXECUTIVE SUMMARY

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to the Department of Natural Resources Canada (NRCan) summarizing the results of the qualitative and quantitative research study regarding climate change adaptation.

In 2009, a National Climate Change Adaptation Benchmark Survey was conducted to establish a benchmark to be used to evaluate progress on adapting to climate change and the impact of the Government of Canada adaptation programming. The survey targeted government and business decision-makers and gathered information about their awareness and understanding of the potential impacts of climate change; whether and how their organizations are currently adapting; and barriers to action. This past research was also used to inform federal program design.

NRCan required updated research to assess Canada's progress in addressing adaptation and the impact of federal investments in adaptation to climate change. This research contributes to an assessment of Canada's progress in addressing adaptation and the impact of federal investments in adaptation to climate change in Canada and will be used to measure change in awareness and actions on adaptation in communities and businesses; assess decision-making information and tools; and identify barriers to action. Results will support public reporting of progress on adaptation under the Charter on Effective Action on Climate Change, and the Horizontal Management Framework on Clean Growth and Climate Change.

The total cost to conduct this research was \$109,249.81 including HST.

Earnscliffe conducted a two-part research program, with both a quantitative and qualitative phase.

For the quantitative phase, we conducted a telephone survey in collaboration with our quantitative sub-contractor, Léger. The survey was conducted via telephone from Léger's centralized call centre using state of the art Computer Aided Telephone Interviewing (CATI) system. The total sample was 350 individuals, including 100 who occupy Chief, Manager or Director of Planning positions in municipalities across Canada and 250 individuals occupying Head of Operations or Chief Risk Officer positions in natural resource industries across Canada. The survey was conducted between February 5 and March 14, 2018. The average length of each interview was 15 minutes.

For both the municipal and business samples, stratified random sampling was used. In the case of municipalities, the final sample was fairly consistent with the known distribution of small, medium and large municipalities and as a result, the results have not been weighted. The aggregate municipal results can be considered accurate to within +/-9.8% at the 95% confidence level.

In the case of the business sample, the distribution of small, medium and large businesses within each sector was similar enough to the known distribution that it was decided that no weight would be applied based upon size. However, since the relative sizes of the sectors in the stratified quota structure was not reflective of reality, a weight was applied by sector so that the aggregate results of the business sample would be representative of the universe being studied. The aggregate business results can be considered accurate to within +/-6.2% at the 95% confidence level.

The qualitative phase consisted of 13 in-depth interviews with representatives from the associations representing small businesses and commerce, companies in the oil and gas, mining, forestry and utilities industries, an association representing municipalities, as well as some individuals from municipalities in coastal regions. The purpose of the qualitative research was to gather some deeper insights from specific perspectives that may not have been explored in-depth in the survey. The interviews were conducted between February 27 and March 21, 2018.

*For the purposes of this report, wherever findings from the in-depth interviews are presented, it is important to note that qualitative research is a form of scientific, social, policy and public opinion research. Qualitative research is designed to elicit the full range of ideas, attitudes, experiences and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants are not representative in a statistical sense of the larger population from which they are drawn and findings cannot reliably be generalized beyond their number.*

The key findings from the research are presented separately for each of the two samples—business and municipal.

## Business Findings

### Awareness and Impressions of Climate Change Relevance

- **There is broad agreement that climate change is happening right now.** Business respondents cite more frequent and severe weather events as the most serious impact of climate change in their region/community and are concerned about economic effects.
- The majority of business respondents (62%) expect that climate change will have at least a moderate impact, including 19% who expect it will have a major impact on their region.
- **One quarter of business respondents (25%) report that climate change is having an impact on their organization.** There is variation between sectors—those in mining (34%) and power (38%) are more likely than respondents in the other sectors to say climate change is having an impact on their organization.
- **Roughly the same number of business respondents (29%) think climate change will impact their organization in the next 1–5 years.**
- Among those who expect that climate change will have an impact, business respondents are far more likely to feel the impact will be negative than positive and the main concern is economic loss.
- The majority of all businesses and within each sector surveyed, save for mining, report that climate change does not present a significant challenge to their organization.

### Climate Change Adaptation

- The majority of businesses across the four sectors surveyed are not taking action to adapt to climate change, although one quarter of these businesses (24%) report they plan to engage in climate change adaptation activities.

- Businesses engaging in climate change adaptation activities tend to report operational initiatives.
- **A minority of businesses say they have been incorporating climate change in decision-making for years, though results vary by sector.**

### Incorporating Climate Change Considerations in Decision-Making

- **The primary source of information about climate change for businesses (56%) is the media.**
- When asked whether potential barriers to adaptation are significant, minor, or not a barrier at all, business respondents indicated that the cost of adapting presents the most significant barrier (30% identify it as a significant barrier), followed by the complexity of the policy change process (28%) and lack of experience (23%).
- Over two thirds of businesses agree they have the information they need to make decisions about climate change adaptation. Among those who feel they do need more information, the top request from businesses is climate data and future projections of climate conditions.

### Municipal Findings

#### Awareness and Impressions of Climate Change Relevance

- **There is broad agreement that climate change is happening right now.** Municipal respondents cite more frequent and severe weather events as the most serious impact of climate change in their region/community and are particularly concerned about flooding.
- Overall, the majority of municipal respondents expect climate change will have at least a moderate impact on their community (68%), including one in ten (11%) who expect it will have a major impact on their community.
- **Half of the municipal respondents (51%) report that climate change is having an impact on their organization.**
- **One third (35%) of municipal respondents think climate change will impact their community in the next 1-5 years,** though this opinion varies widely by size of municipality.
- Among municipal respondents, the vast majority report climate change will have a negative impact on their community, with flooding being the most frequently cited negative impact.
- For municipal respondents, climate change, while not the greatest issue they face, is still a significant challenge. Over half across all municipality sizes hold this view.

## Climate Change Adaptation

- Across all sizes of municipalities, over 50% report that they are taking action to adapt to climate change and among the other half, 42% report they plan to engage in climate change adaptation activities.
- **Overall, municipal respondents report being fairly advanced in climate change adaptation planning.** Most of their adaptation activities revolve around emergency preparedness and natural disasters/major weather events. For example, 51% of those who are taking action reported their activities include emergency response/disaster planning, and 44% mentioned flood management activities. Following those two activities, planning activities such as preparing a plan (33%) and incorporating adaptation into long-term planning (33%) were the most frequently mentioned.

## Incorporating Climate Change Considerations in Decision-Making

- **The primary source of information about climate change for municipal respondents (26%) is the media.**
- Overall, municipal respondents report facing multiple significant barriers to taking climate change into decision making. The most significant barrier, reported as such by almost three quarters of the municipal respondents, is the cost. A lack of capacity to apply tools and information (48%) and lack of experience (40%) are also significant barriers for pluralities of the municipal sample.
- Information is not the main barrier for municipal respondents, with over two thirds agreeing they have the information they need to make decisions about climate change adaptation. Among those who feel they do need more information, the top request for municipal respondents is more regionally or locally specific impacts.

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I hereby certify as a Representative of Earnscliffe Strategy Group that the final 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: 

Date: March 29, 2018

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