

Focus Groups on the Forest Bioeconomy

Executive Summary

Prepared for Natural Resources Canada

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Executive Summary

1.1 Background and Purpose

In recent years, the development of a competitive bioeconomy has become a priority for federal and provincial governments. The forest bioeconomy specifically represents an opportunity for the forest sector to diversify products and access new markets, and is a vital part of the transition to a low carbon future. Some research in the form of consultations has been undertaken by the Canadian Council of Forest Ministers (CCFM) with governments and forest industry stakeholders. However, little research has been conducted on the public's perceptions of the forest bioeconomy in Canada.

The overall purpose of the research was to provide Natural Resources Canada (NRCan) with an understanding of the general public's awareness, understanding and perceptions of the forest bioeconomy. Topics explored included:

- Perceptions of the Canadian forest industry.
- Perceptions of sustainable forest practices.
- Awareness of the forest bioeconomy.
- Positive and negative associations with the forest bioeconomy.
- Perceived consumer reactions to products made from sustainably sourced biomass.

Results from the research will be used to:

- Provide input to future public opinion research.
- Assist in the development of communications to increase the general public's awareness of the economic potential of new technologies and bioproducts for the forest products industry.
- Provide fundamental public environment information for program, policy and communications planning, inform post-COVID-19 green recovery efforts in the forest sector and identify focus areas to accelerate the bioeconomy's contribution to Canada's 2030 and 2050 climate goals.

1.2 Method

Two two-hour online focus groups were conducted November 14 and 18, 2020, with one group conducted in English, and one in French. There were seven participants in each focus group.

Participants in the English-language group were drawn from B.C., the Northwest Territories, Saskatchewan and Newfoundland. Participants in the French-language group were drawn from Quebec, Manitoba, Ontario and New Brunswick.

The qualified participants were members of the general public 18 years of age and older, but excluding people working in the forestry or energy sectors. Within each group there was mix of men and women, a mix on age, and a mix on community size (large city/suburb of a large city versus small/medium city/town/village/rural area).

1.3 Note on Interpretation of Findings

This research was qualitative in nature, not quantitative. As such, the results provide an indication of participants' views about the topics explored, but cannot be statistically generalized to represent the full population. Further, due to the small size of this project (two focus groups, 14 participants), there is not sufficient data to suggest hypotheses about the prevalence of themes in awareness and attitudes among the broader general public. The value of this qualitative research is that it gives an indication of the range and types of views that can be found among the general public pertaining to sustainable forest practices and the forest bioeconomy.

1.4 Key Findings

Impressions of the Canadian Forest Industry

Participants did not feel they were knowledgeable about the forest industry in Canada. To varying albeit quite limited degrees they had some impressions based on things they had seen or heard in the media, but overall there was little depth of knowledge.

There was general agreement that the forest industry plays an important role for Canada in terms of jobs and trade, but no specific knowledge of the size of the sector in terms of number of jobs.

Quite a few participants commented on the importance of planting new trees to at least replace those that are cut down. Essentially, they were saying that it is important to ensure the long-term health of Canada's forests. However, there were mixed views as well as a lack of knowledge on the extent to which this is happening and the level of success of regeneration programs.

Impressions of Sustainable Forest Practices

The large majority of participants said they did not know how Canada compares to other countries in terms of sustainable forest practices. They hoped that Canada compares well – and some assumed Canada likely compares well, but they had limited knowledge of what is being done in Canada, and even less knowledge about what is being done in other countries.

Participants were given the following information: *Canada harvests less than 1% of its forests each year, and as a result of forest management requirements more than 500 million tree seedlings are planted each year.* This was new information for almost all the participants. It was perceived to be a positive statement about sustainable forest practices, but many participants raised questions as to whether the information is as good as it seems on the face of it. Questions were raised about the meaning of the 1% figure, the level of success of planting tree seedlings in ensuring forest health, and harvesting impacts on old-growth forests.

Participants were then given the following information: *There are several third-party independent organizations that certify whether or not a particular forest is being sustainably managed. It turns out that Canada has the largest area of third-party-certified forests in the world, that is, the largest area of sustainably managed forests in the world.* A majority of participants were suspicious or at best skeptical about this information without knowing more about who these organizations are, how they operate and the standards they apply to certifying forestry management practices. Despite the skepticism, some did note that there is a need for the public to be reassured that forests are being sustainably managed. They felt it is a good idea to have organizations that are neutral, unbiased and scientifically sound do evaluations that evaluate sustainability practices and compliance with regulations. The issue is convincing people that an organization meets these criteria.

Some participants also raised questions about the claim *“largest area of sustainably managed forests in the world”*:

- Several said they wanted to know what percentage of Canada’s forests are sustainably managed. Their point was that if this percentage appears to be small, the claim about comparison to other countries is less impressive.
- Several noted that Canada is a very large country with a lot of forested areas. In this context, comparing the absolute size of sustainably managed forests in Canada to the sizes in other countries with much less forested land is a bit misleading.

Awareness of the Phrase “Forest Bioeconomy”

None of the participants had seen or heard the phrase “forest bioeconomy.” If the phrase is to be used in communications, it will need to be explained.

Presentation of Information about the Forest Bioeconomy

To help facilitate informed discussion, participants were provided information about what the forest bioeconomy is, a description of the various sources of forest biomass that can be used in the forest bioeconomy, and several examples of things that can be made using forest biomass.

Notably, the information read to participants about the forest bioeconomy was largely unfamiliar to them. That is, not only was the phrase “forest bioeconomy” unfamiliar, but also information on sources and uses of forest biomass.

Perceived positive aspects of the forest bioeconomy and the uses of biomass to make products and to make various types of biofuels

Participants liked the idea of making more use of forest biomass where possible, and that it is good for the environment to use wood fibre and all parts of trees as resources to produce a variety of products in addition to traditional lumber. Perceived benefits included:

- Products made from wood fibre will hopefully be recyclable or reusable, and can replace products that are not.

- Products made from wood fibre, including biofuels, can result in reduced greenhouse gas emissions relative to the products they replace.
- Forest biomass is a renewable/sustainable resource, and can replace some products that are not made from renewable materials.
- Using all parts of trees is economically more efficient, less wasteful, and more respectful of the environment.

Participants perceived the forest bioeconomy to have the potential to boost Canada's economy and jobs through the creation of new industries. There is also a perceived potential to boost exports, as trade is important for the Canadian economy.

Concerns or questions about the forest bioeconomy and the uses of biomass to make products and to make various types of biofuels

Participants had a number of concerns or questions about the forest bioeconomy and the uses of biomass. These related to (a) the efficacy and safety of the products produced from forest biomass, and the longevity of these products; (b) the viability of the industry and the products it would produce; (c) who benefits from the forest bioeconomy and who possibly suffers from the creation of the forest bioeconomy; (d) environmental concerns; (e) cost and affordability of biomass products.

The number of participants raising questions or concerns, and the variety of types of questions and concerns, points to the importance of providing information to the public about the forest bioeconomy as part of growing this sector of the economy.

Overall, what would you want to see happen to make sure that the forest bioeconomy makes a strong positive contribution to Canada both now and in the future

Participants emphasized that affordability of products made from forest biomass is a key consideration. Their point was that while they believe in social responsibility and want to practice it for the good of the environment and society as a whole, what it costs to buy these products is the bottom line. Unless these products are affordable, people and companies will not make the change to products produced from forest biomass.

A number of participants emphasized that the use forest resources should not exceed the ability to renew and sustain those resources. That is, the forest bioeconomy should not have a net negative impact on Canada's forests.

Do you think governments in Canada should invest in encouraging greater development of the forest bioeconomy and should Canada try to be a world leader in this area

There was general agreement that governments in Canada have an important role to play in investing in research and development, in assisting and encouraging adoption of new products, and

in providing objective information to the public. Some also commented that government involvement will also help ensure that sustainability and environmental protection standards will be followed.

What more would you like to know about uses of forest biomass or bioenergy to be comfortable supporting these types of uses of forest resources

Participants identified the following types of information that they would like:

- Ensure that economic development of the forest bioeconomy is accompanied by good sustainability and environmental practices, so that there is no net harm to Canada's forest resources.
- Provide information about the status of the development and commercialization of products and the industries involved in the production of products from forest biomass and biofuels.
- Provide information about how this is affecting the traditional forest industry and job creation within the industry.
- Provide information about the impact of the bioeconomy on the oil and gas industry.
- Try to ensure that the new industry equitably benefits all provinces and territories. This comment was motivated by the perception that not all provinces and territories have equivalent forest resources.
- Provide assurance that this is a viable industry producing products people will buy and that creates jobs.

Consumer Interest in Products Made from Sustainably Sourced Biomass

Participants said they are interested in products made using sustainably sourced wood fibre and would make an effort to find products of this type. However, these products must also provide value for money relative to what they are paying now.

One area of interest was alternatives for food packaging, that is the reduction or replacement of traditional plastic packaging or containers with packaging made from forest biomass. Generally participants said they might be willing to pay a little bit more for products that are not single use products or that are single use but can be recycled, composted or re-purposed. Again, however, some cautioned that the products must provide value for money: they would not pay more for a product that is significantly inferior to what they buy now just because they are made from forest biomass.

When asked what they would like to see on the packaging to be sure that a product is made using sustainable materials and practices, most participants in one session said that it would be most believable if the packaging had some sort of government seal certifying that the product met the necessary standards.

1.5 Contract Value

The contract value is \$25,918.25 including HST.

1.6 Statement of Political Neutrality

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