



Natural Resources Ressources naturelles
Canada Canada

Natural Resources in a Low-carbon Economy 2019

Executive summary

Prepared for Natural Resources Canada

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Canada 

**Natural Resources in a Low-carbon Economy
Final report**

Prepared for Natural Resources Canada by Environics Research

April 2019

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Executive summary

A. Background and objectives

Canada is one of the world's leading producers of natural resources and is also one of the highest per capita users of energy. As such, the importance of natural resources to this country cannot be overstated. The priorities of the Government of Canada, and of Natural Resources Canada (NRCan) in particular, are:

- Accelerating development of clean technology and the transition to a low-carbon economy
- Enhancing our sustainable resource advantage through science
- Improving market access and competitiveness

NRCan commissioned Environics Research to conduct qualitative and quantitative research. This research was designed to provide a clear and current understanding of Canadian public opinion on a wide-range of natural resource issues related to forests, mining, energy (including energy efficiency), clean technology, climate change and government science.

B. Methodology

Qualitative phase

A series of twenty online focus groups was conducted between January 30 and February 19, 2019. Focus groups were held using online conference technology with residents of Toronto, Calgary, Vancouver, Timmins, Dartmouth, Prince George, Saint John and Medicine Hat (two groups per location in English) and Montreal and Val D'Or (two groups per location in French). The participants in these focus groups were segmented by household income – one group in each city was composed of Canadians with lower household incomes and the second group was composed of Canadians with higher household incomes. Across all groups, 140 participants were recruited and 96 attended. Participants received a \$100 honorarium. Focus group sessions were about one hour and 45 minutes in duration.

In this report, regional differences are highlighted according to the following breakdowns:

- Urban cities include: Vancouver, Calgary, Toronto and Montreal
- Rural cities include: Prince George, Medicine Hat, Timmins, Val D'Or, Dartmouth and Saint John
- Coastal cities include: Vancouver, Dartmouth and Saint John
- Inland cities include: Prince George, Calgary, Medicine Hat, Timmins, Toronto, Montreal and Val D'Or
- Western cities include: Vancouver, Calgary, Prince George and Medicine Hat
- Eastern cities include: Timmins, Toronto, Montreal, Val D'Or, Dartmouth and Saint John

Statement of limitations: Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as indicative rather than projectable to the population.

Quantitative phase

Environics Research conducted an online survey with 3,444 Canadians aged 18 and over, from March 4 to 15, 2019. Quotas were set by age, gender, and region and the final data were weighted to ensure the sample is representative of the Canadian population, according to the most recent Census. Survey respondents were selected from registered members of an opt-in online panel. Since a sample drawn from an online panel is not a random probability sample, no formal estimates of sampling error can be calculated. Nonetheless, online surveys can be used for general population surveys provided they are well designed and employ a large, well-maintained panel.

More information about the methodology for research is included in Appendices A and B of the full report.

C. Contract value

The contract value was \$168,115.75 (HST included).

D. Key findings

A. Qualitative research

- Focus groups participants demonstrated limited knowledge of and understanding about a low-carbon economy. The term was understood to refer to efforts to reduce carbon emissions, but few could explain how this was connected to the economy (either positive or negative).
- When discussing changes required at either a household or a societal level to achieve a low-carbon economy, participants tended to fall back on well-known actions with which they are already comfortable (i.e., recycling, reducing waste or conserving energy). Similarly, there was a tendency to focus on solar, wind energy and hydro energy supply solutions because they are generally positioned as positive and environmentally friendly options.
- Participants were unclear what potential impacts a low-carbon economy will have on Canada's natural resource industries. Participants in communities where these industries are prominent were no more aware of the implications from a natural resource perspective.
- Participants recommended communications designed to encourage a low-carbon shift should focus on positive environmental outcomes rather than on positive economic ones. Yet at the same time, the up-front cost to their household was by far the key perceived barrier to making changes. These conflicting viewpoints suggest that an economic argument is relevant, but perhaps more so at the household level than for the overall economy.
- Further efforts are needed to convince Canadians that change is possible and to demonstrate the effectiveness of these changes. The biggest barrier to a low-carbon economy focused on the cost and/or perceived cost of making changes. Therefore, participants were most likely to want financial incentives, as well as clear guidance and results-based reporting, to help encourage all Canadians to work together to bring about a low-carbon economy for Canada.

B. Quantitative research

- Canadians take a “big-picture” view of the country’s natural resource issues, indicating that the top concern is ensuring there are enough resources for future generations (14%). The exception is Alberta, where residents place greater emphasis on the need to get a pipeline approved and built (16%). From three to under four in ten (between 31 and 37 percent) rate the federal government’s performance on natural resources issues as good, but Canadians don’t appear to differentiate between the various aspects of the file, suggesting a broad lack of familiarity with the government’s efforts.
- The public holds largely positive views about natural resource development writ large. There is widespread recognition that it provides employment opportunities and benefits the country (84% agree), province (79%), community (65%) and individuals themselves (54%). Canadians also express generally positive opinions about the economic contributions of specific natural resource industries, including the oil sands, mining and forestry sectors. Opinions tend to be more divided about the adequacy of regulations to limit the environmental impact of these three industries.
- There is broad support for expanding energy infrastructure such as pipelines, railways, ports and roads to get oil sands oil to market (69% vs. 31% who oppose new infrastructure). This level of support reflects the majority view (62%) that oil will remain as important an energy source for households and businesses, or become even more important, in the next decade. When it comes to energy issues in Canada today, Canadians express the greatest concern about the price they pay (83%), ahead of concerns about the environmental impact of the industry (74%) and the country’s ability to shift to clean energy sources (70%).
- Opinions about new innovations suggest that Canadians are moderately optimistic about their potential. For instance, forest bioenergy is considered a renewable (72%), affordable (66%), low-carbon (57%) energy source that Canada should rely more on (57%). As well, a small majority (58%) believes small nuclear energy reactors should be part of Canada’s energy mix. Canadians’ positive orientation towards innovation is also evident in the two initiatives considered most important for Canada to adopt to achieve a low-carbon economy: fund new technologies to store energy from alternative sources, and convert waste and residues to biofuels and renewable natural gas.
- Validating the findings of the focus group research, there is a lack of familiarity with and understanding of the term “low-carbon economy”, which could hamper efforts to communicate with Canadians. Relatively few (29%) recall hearing or seeing the term recently; those who do primarily associate it with the use of renewable or low-carbon alternatives to fossil fuels, and few make the connection to the economy.

E. Political neutrality statement and contact information

I hereby certify as senior officer of Environics 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 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.

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