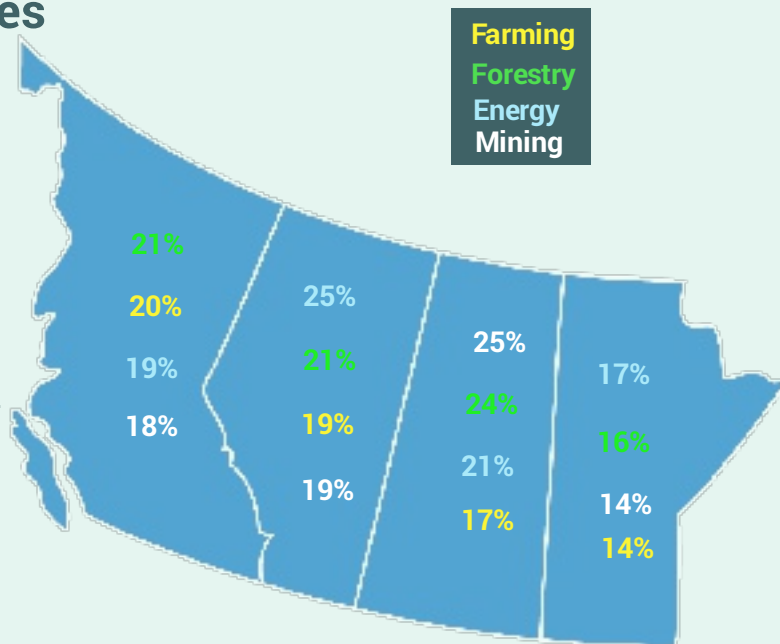


Consulting with aboriginal peoples

Public support for resource industries

Perceived performance ratings vary across provinces

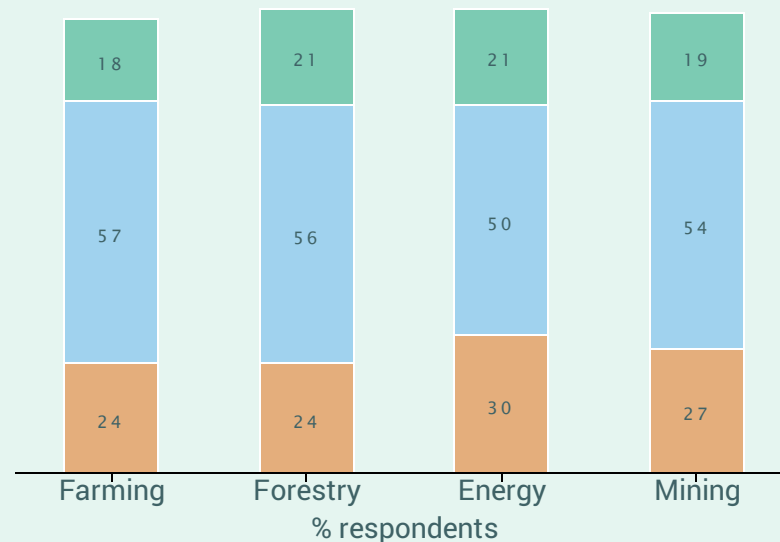
The percentage of respondents who thought each industry was doing a good job at consulting with aboriginal peoples.



7th
out of seven

#7 issue related to resource industries:
3% of western Canadians cited it as the
most important issue.

Little variance in perceived performance ratings across



As a driver of trust

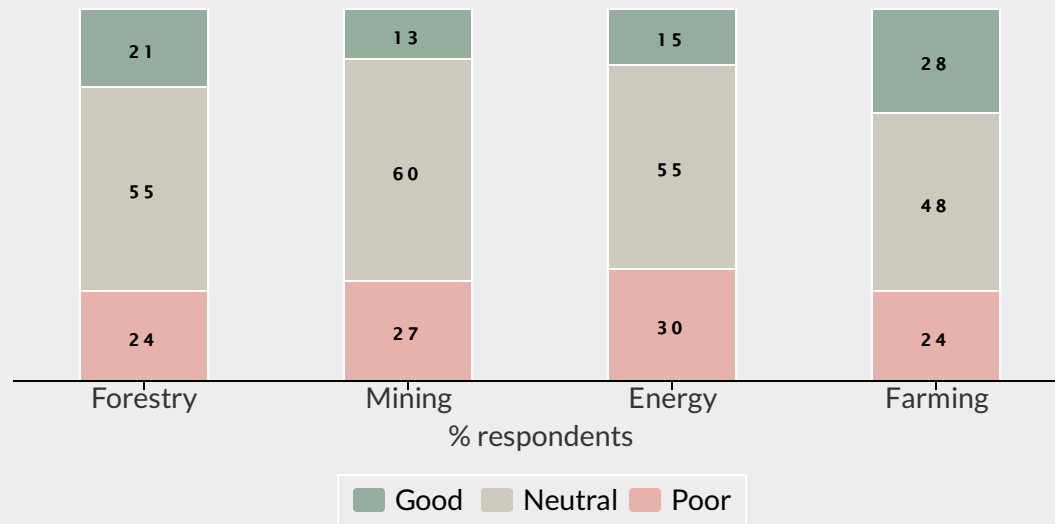
- 1 Consulting with Aboriginal people was not the top driver of trust. It ranked 11th for energy and mining, 14th for farming and 15th for forestry.
- 2
- 3

Aboriginal engagement and consultation

Public support for resource industries in western Canada

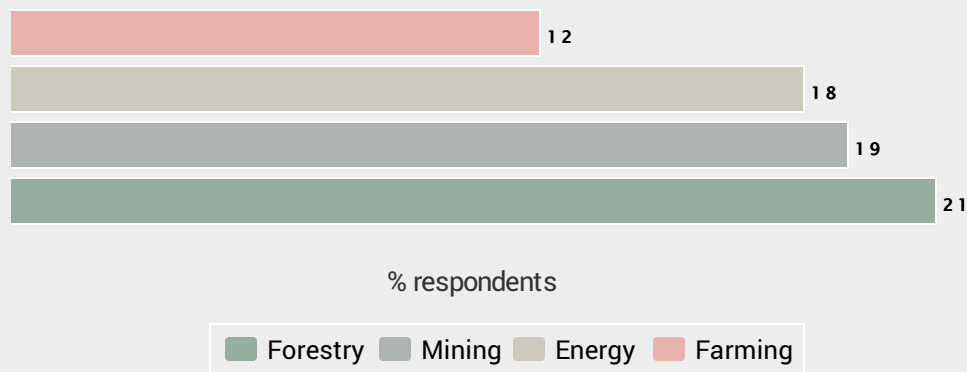


Respondents perceive farming does best at Aboriginal consultation, while energy is rated lowest



Two in three respondents thought Aboriginal Canadians should be engaged on resource projects, and the general public be engaged to the same extent.

Aboriginal Canadians are perceived not to have a lot of influence on resource industries



The proportion of respondents who thought Aboriginal Canadians had an influence on resource industry decision making were the lowest compared to other organizations (like the government, industry associations, environmental NGOs).



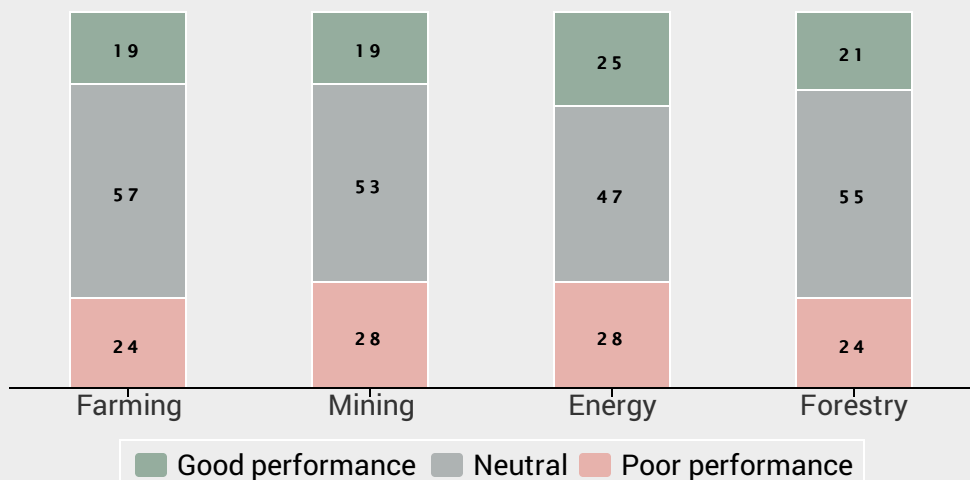
Three out of four respondents agreed that the government and industry should take equal responsibility in engaging Aboriginal Canadians on resource projects.

Aboriginal engagement across the western provinces

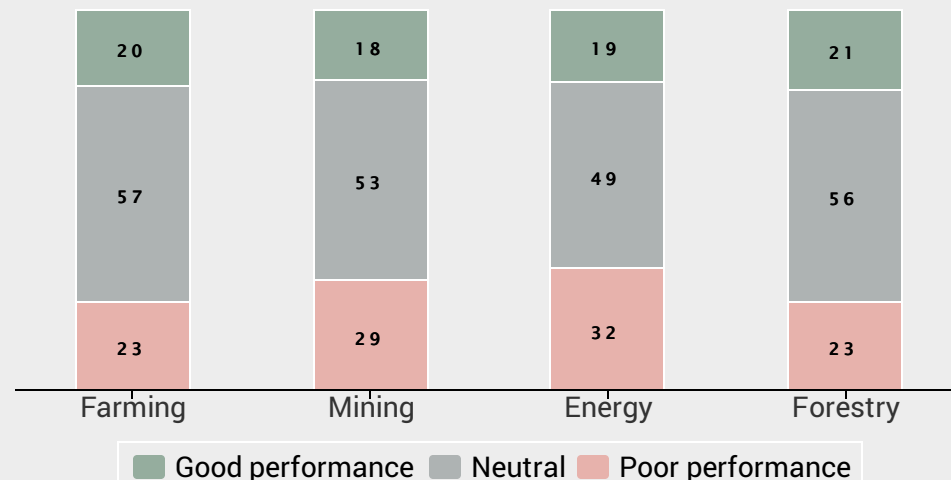
Performance on consulting Aboriginal people perceived to be low across provinces

Alberta

% respondents



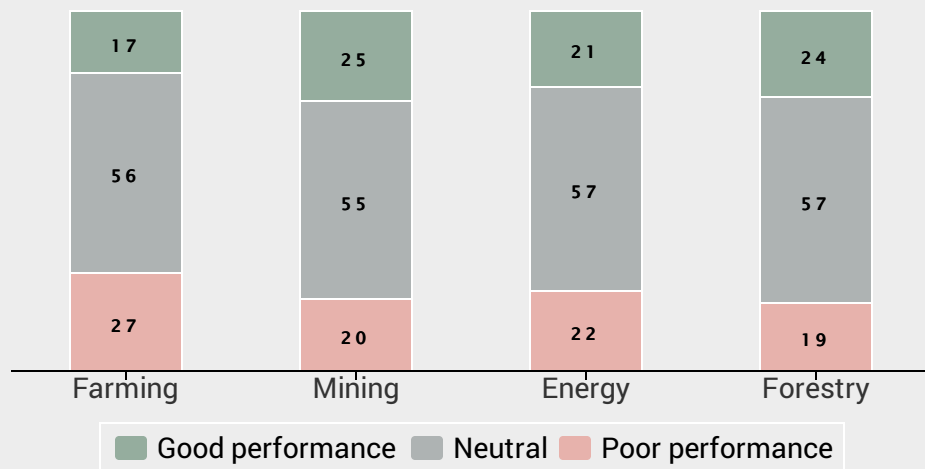
British Columbia



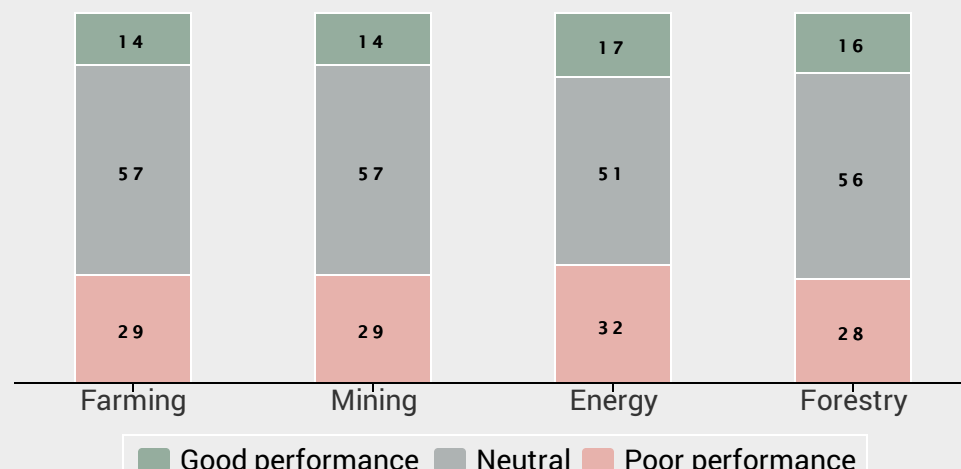
Out of the 4 western provinces Manitoba had the lowest proportion of respondents that gave a good score and the highest proportion of respondents that gave a poor score to all 4 industries for consulting with Aboriginal people.

Saskatchewan

% respondents



Manitoba

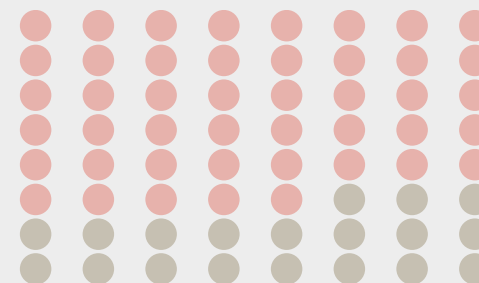
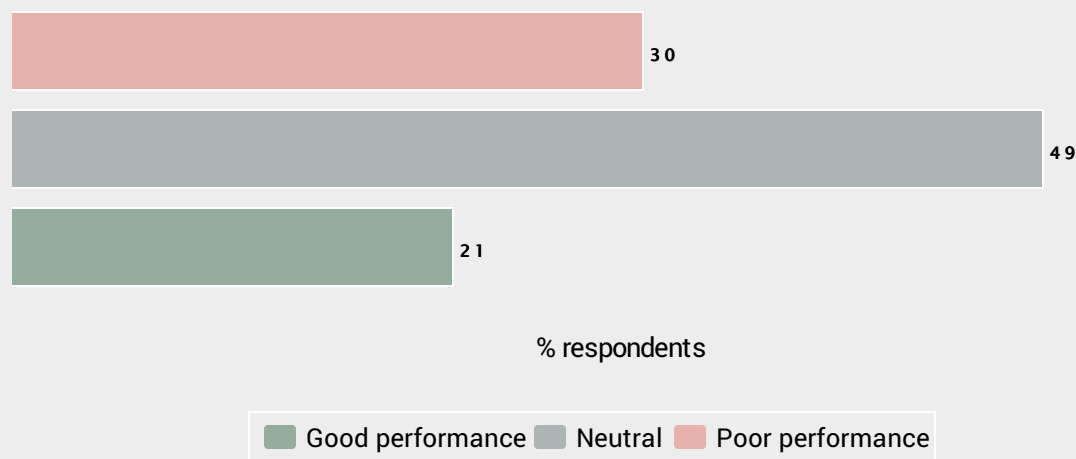


Aboriginal engagement in the energy industry

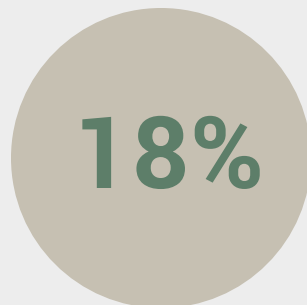
Public support for resource industries



The energy industry is perceived to fall short on consulting with Aboriginal people



About 66% of respondents thought Aboriginal Canadians should be engaged on energy projects, and the general public be engaged to the same extent.



The proportion of respondents who thought Aboriginal Canadians had the ability to influence on the energy industry's decision making were the lowest compared to other organizations (like the government, industry associations, environmental NGOs).

74%



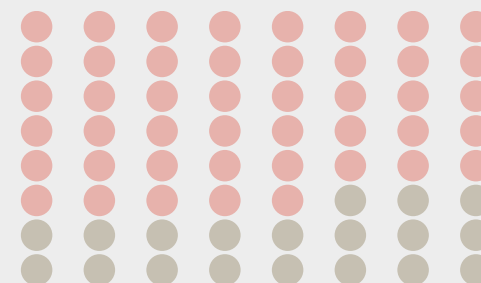
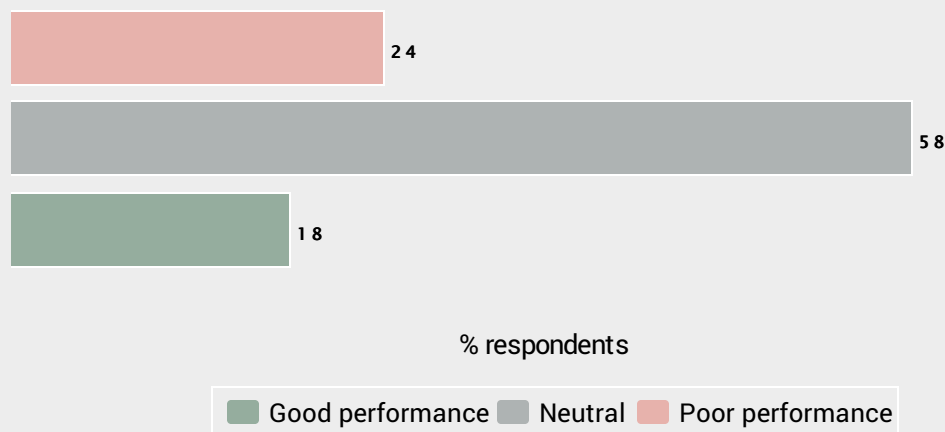
Three in four respondents agreed government and industry should take equal responsibility in engaging Aboriginal Canadians on energy projects.

Aboriginal engagement in the farming industry

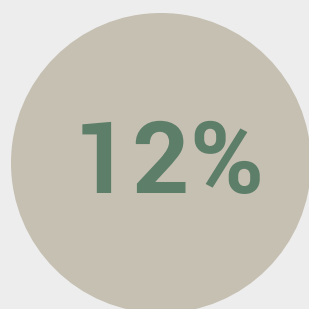
Public support for resource industries



Of the natural resource industries, farming had the smallest proportion of respondents who gave a low performance score



Approximately 61% of respondents thought Aboriginal Canadians should be engaged in farming projects, and the general public should be engaged to the same extent.



The proportion of respondents who thought Aboriginal Canadians had the ability to influence on the farming industry's decision making were the lowest compared to other organizations (like the government, industry associations, environmental NGOs).



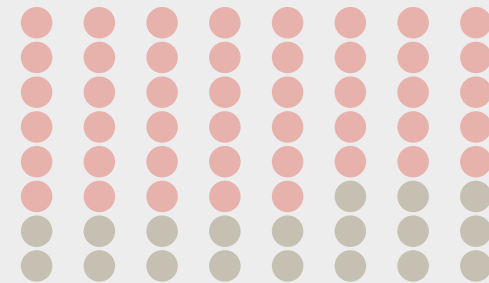
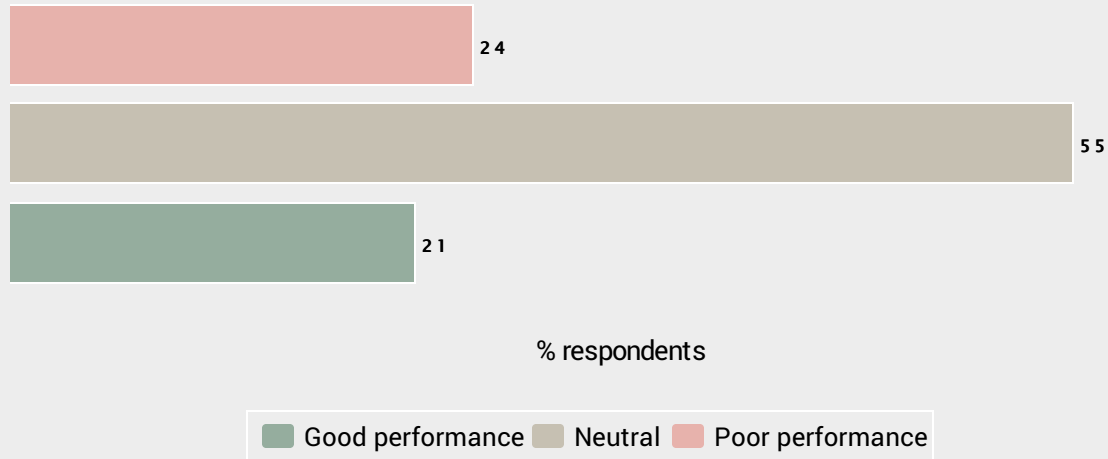
Approximately, three out of four respondents agreed that government and industry should take equal responsibility in engaging Aboriginal Canadians on farming projects.

Aboriginal engagement in the forestry industry

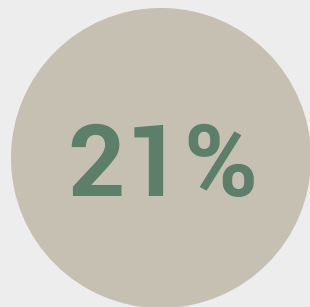
Public support for resource industries



The forestry industry is perceived to fall short on consulting Aboriginal people



About 69% of respondents thought Aboriginal Canadians should be engaged on forestry projects, and the general public be engaged to the same extent.



One in five respondents thought Aboriginal Canadians had the ability to influence on the mining industry's decision-making, the lowest compared to other organizations (like the government, industry associations, environmental NGOs).

74%



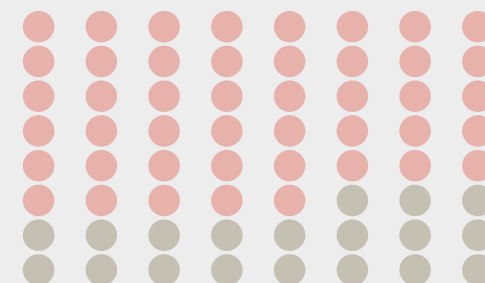
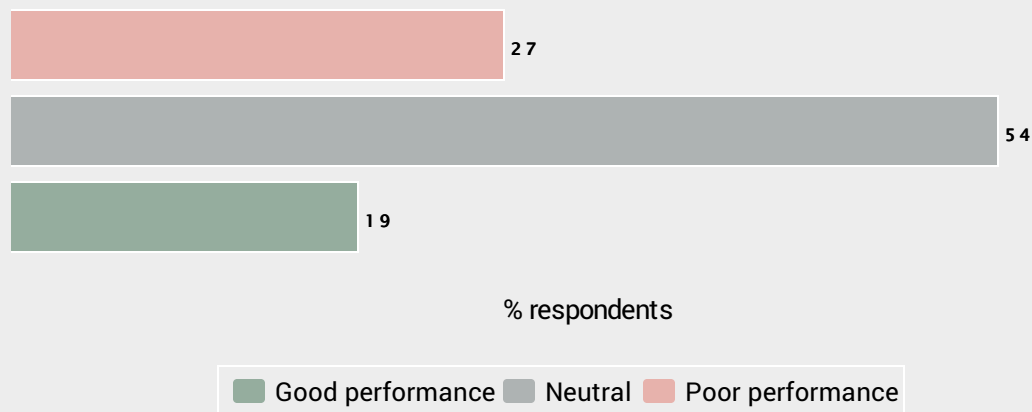
Approximately, 3/4 respondents agreed government and industry should take equal responsibility in engaging Aboriginal Canadians on forestry projects.

Aboriginal engagement in the mining industry

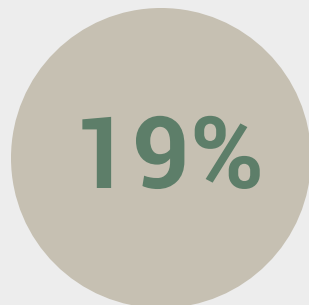
Public support for resource industries



The mining industry is perceived to fall short on consulting Aboriginal people



About 69% respondents thought Aboriginal Canadians should be engaged on mining projects, and the general public be engaged to the same extent.



One in five respondents thought Aboriginal Canadians had the ability to influence on the mining industry's decision-making. The result was lower than other organizations (like the government, industry associations, environmental NGOs).

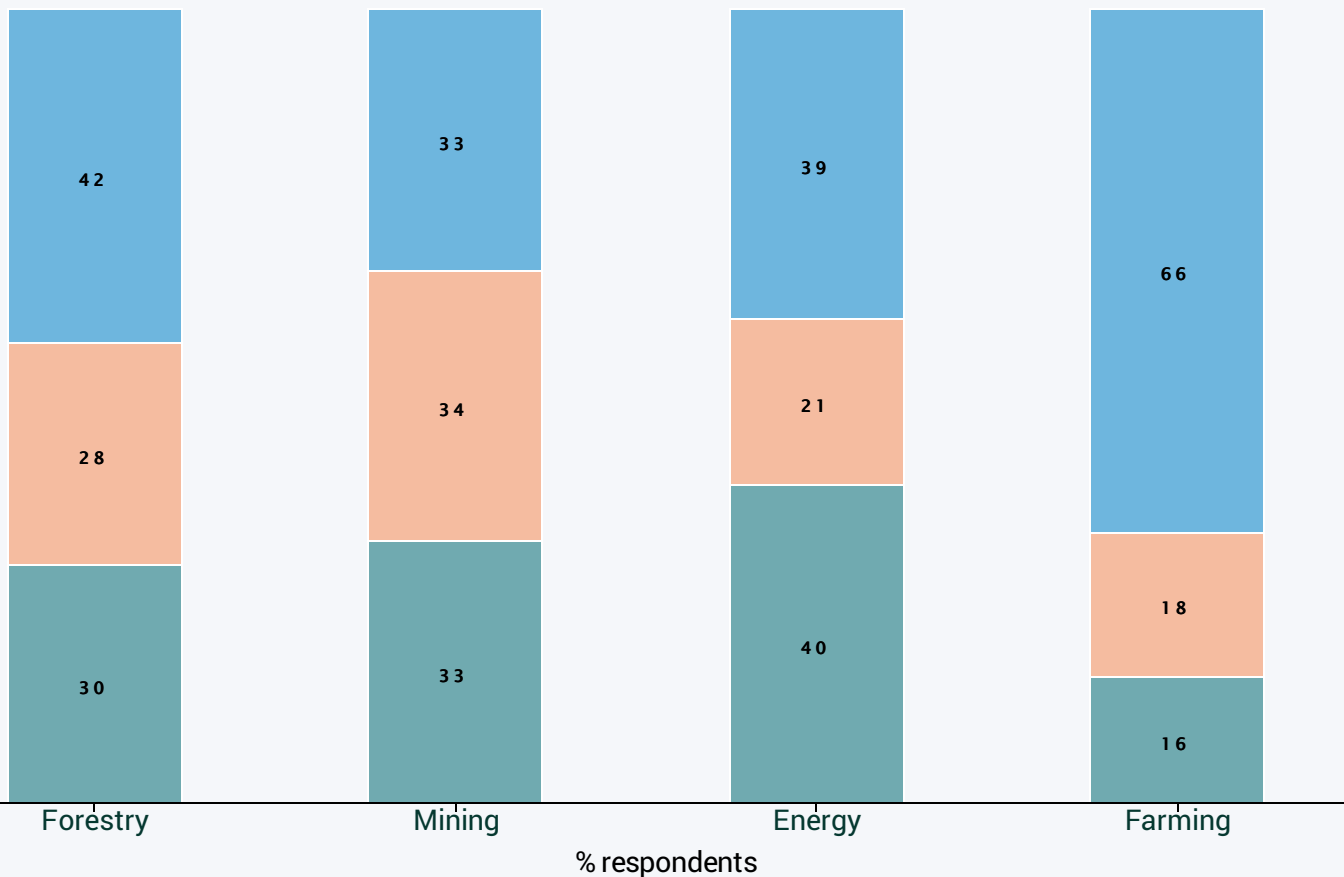
72%



Approximately 72% of western Canadian respondents agreed government and industry should take equal responsibility in engaging Aboriginal Canadians on mining projects.

Farming had the most advocates, energy had the most detractors

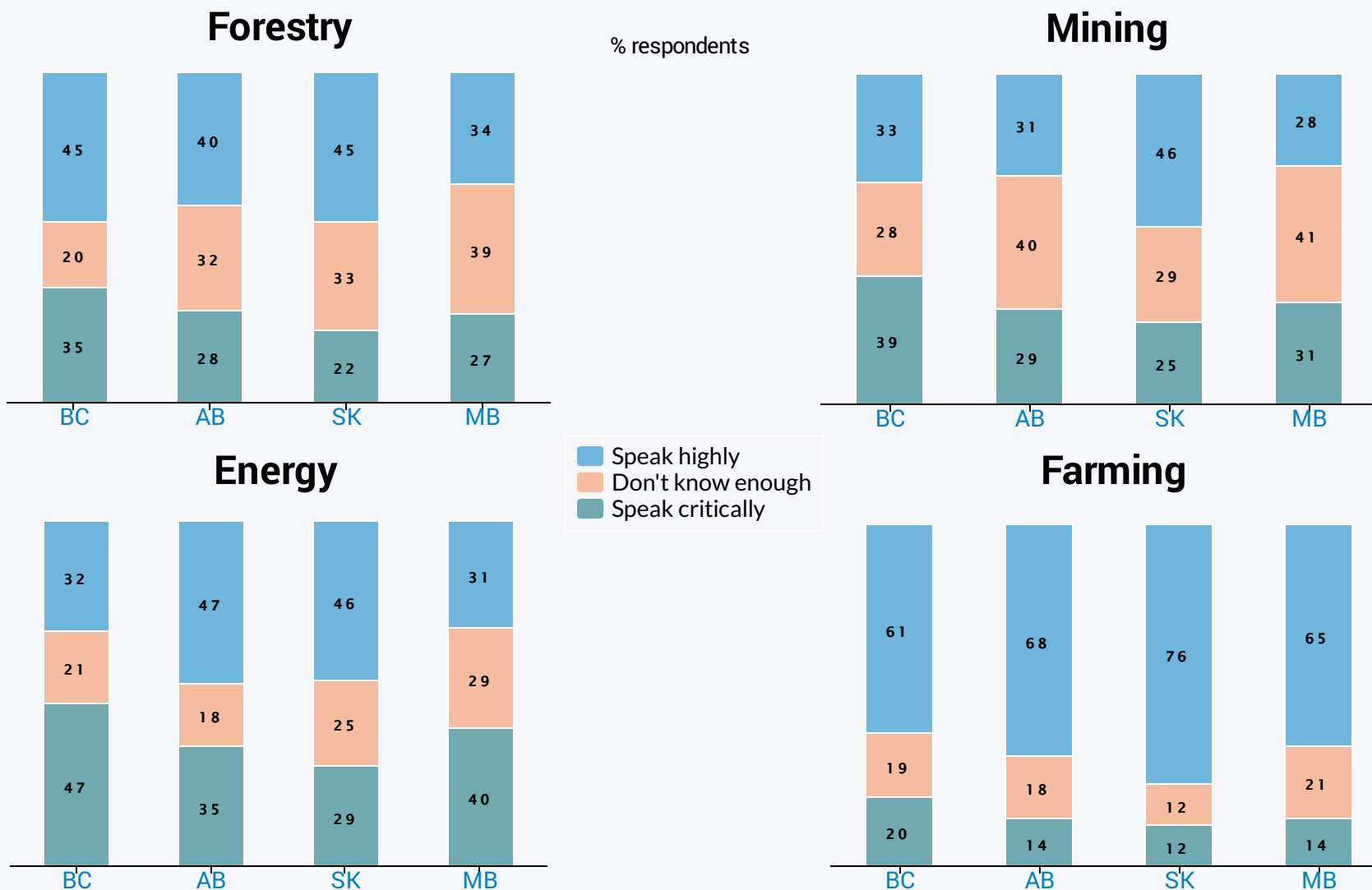
Speak highly
Don't know enough
Speak critically



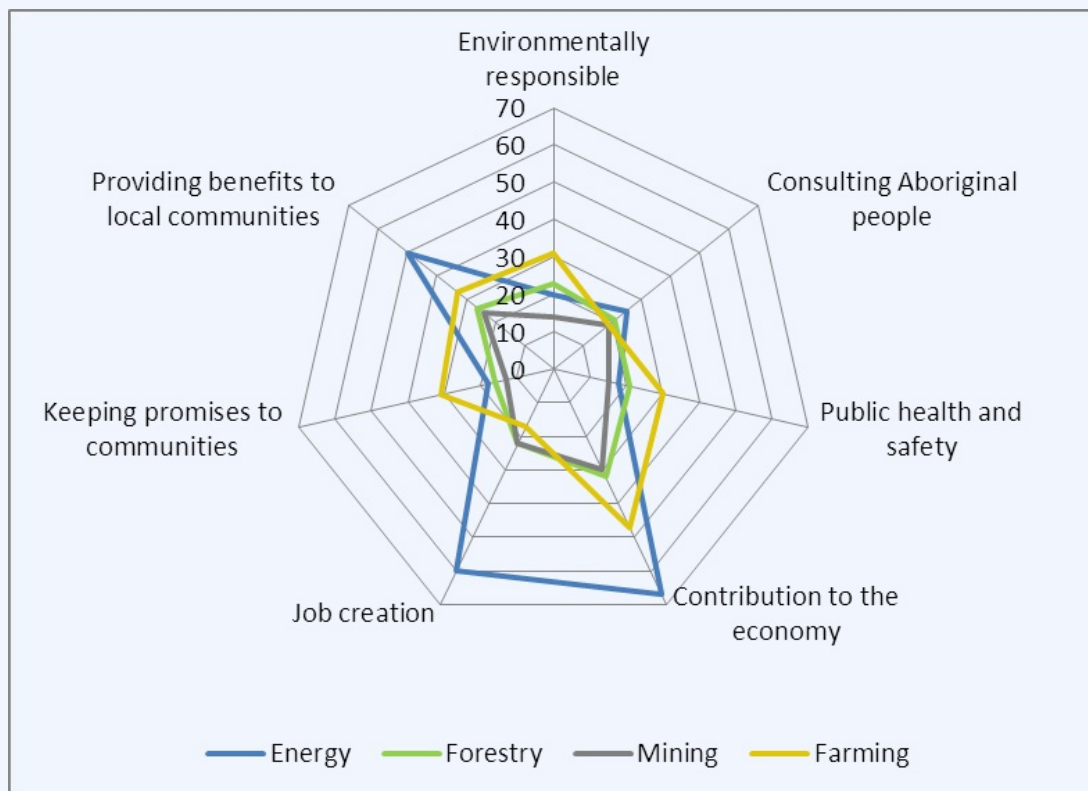
Advocacy increased with
age and income levels.

*Totals may not equal 100% because of rounding.

Respondents most likely to speak highly of farming, least likely of mining

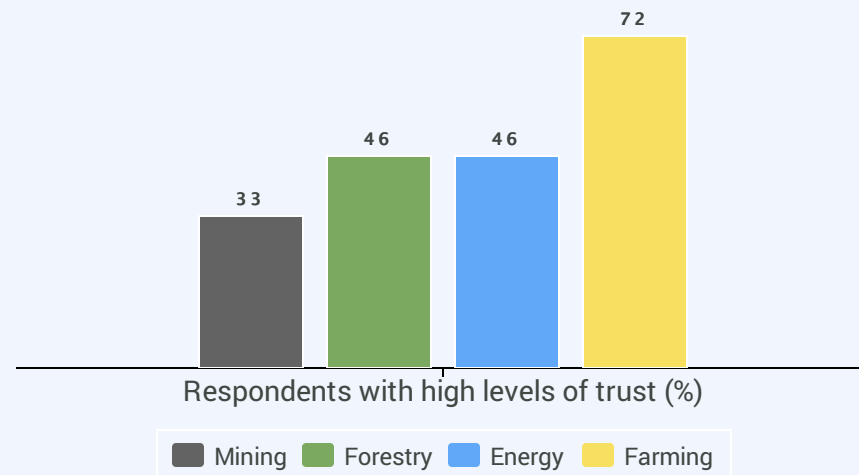


Alberta respondents' perceived performance ratings for resource industries

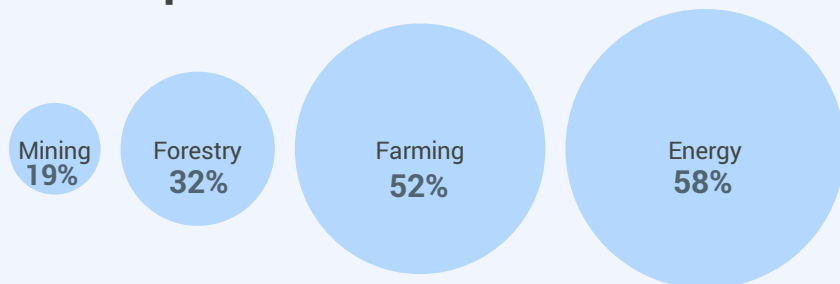


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

Albertans trust the farming industry the most



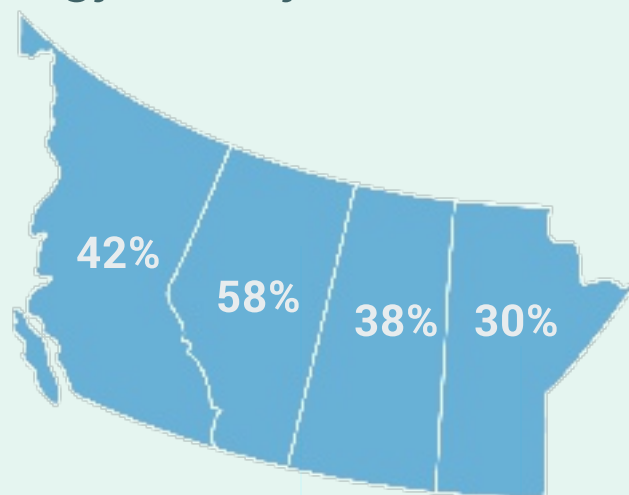
Alberta respondents are most familiar with energy



Like other provinces, farming had the highest trust in Alberta. Trust levels for mining, energy and forestry were the second highest in Alberta, just after Saskatchewan.

Awareness of the energy industry

Alberta most familiar with the energy industry



Three most common sources of information on the energy industry

1. Seen, heard or read news in the media
2. Seen, heard or read advertising
3. Talk with a family member, friend or colleague

Men more familiar with energy than women

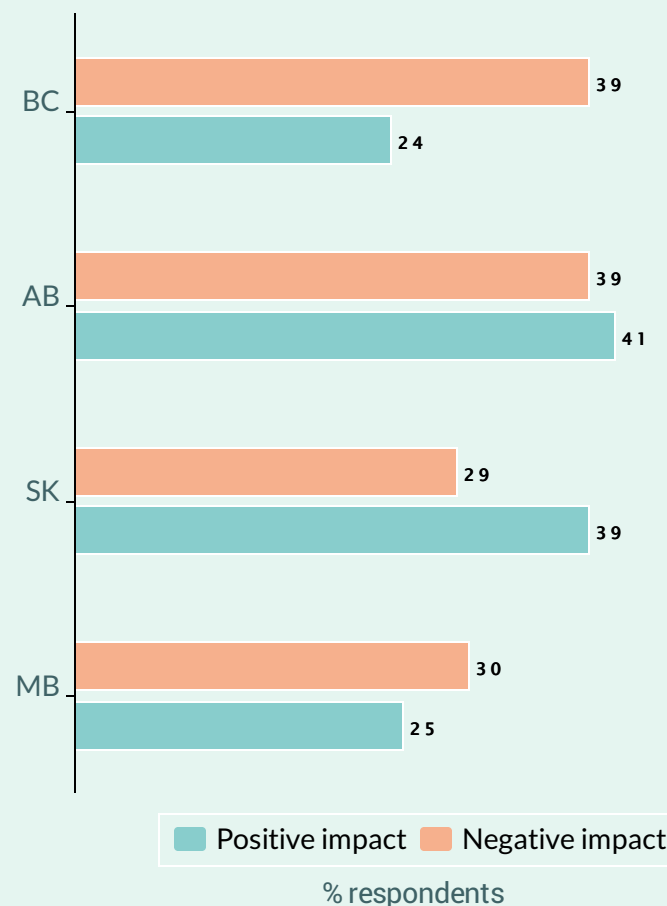
55%



32%



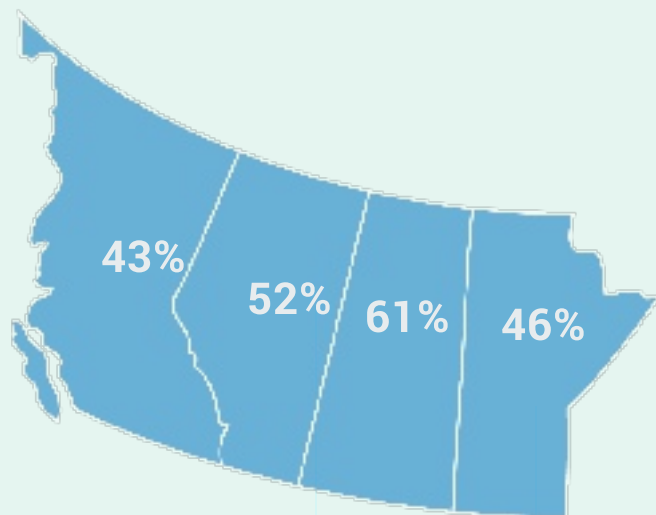
Saskatchewan and Alberta had net positive awareness of the impacts of the energy industry



Awareness of positive and negative impacts of the resource industries.

Awareness of the farming industry

Saskatchewan most familiar with farming



Three most common sources of information on the farming industry

1. Seen, heard or read news in the media
2. Talk with a family member, friend or colleague
3. Seen, heard or read advertising

Men are more familiar with farming

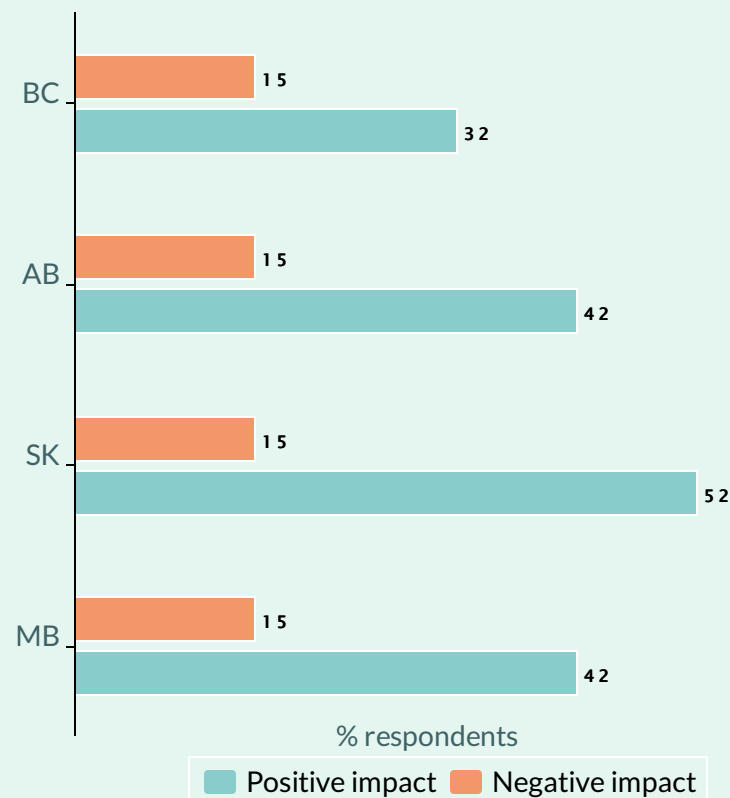
50%



35%



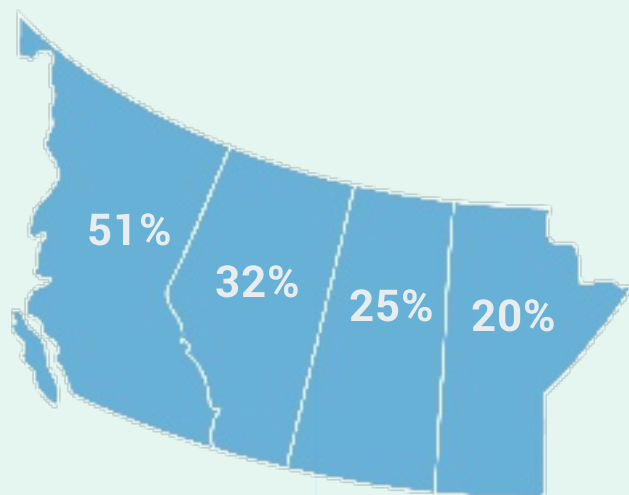
All provinces had high net positive awareness of impacts of the farming industry



Awareness of positive and negative impacts of farming.

Awareness of the forestry industry

B.C. residents most familiar with forestry



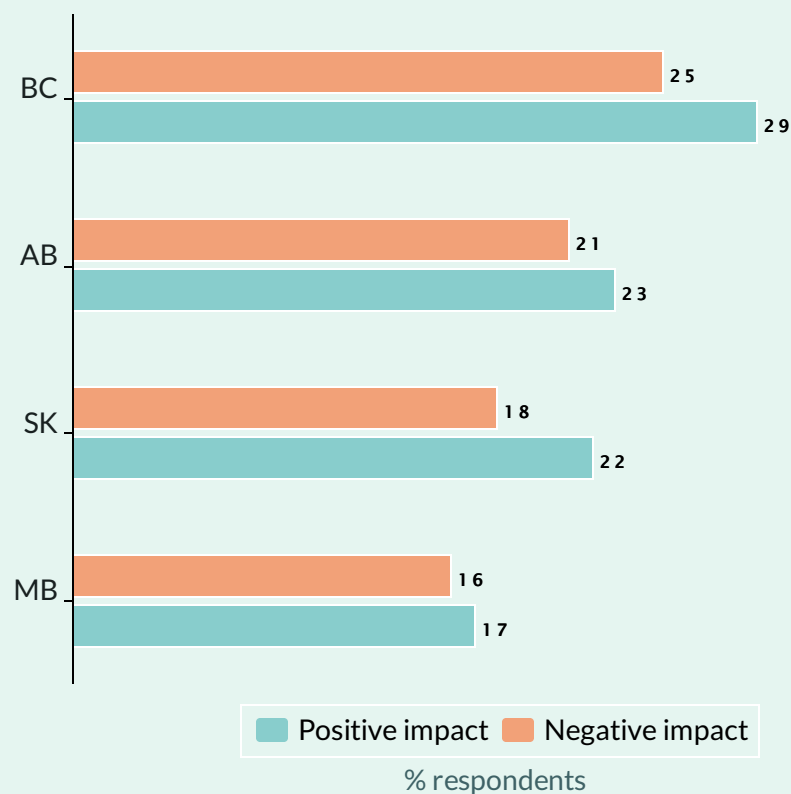
Three most common sources of information on the forestry industry

1. Seen, heard or read news in the media
2. Seen, heard or read advertising
3. Talk with a family member, friend or colleague

Men almost twice as familiar as women



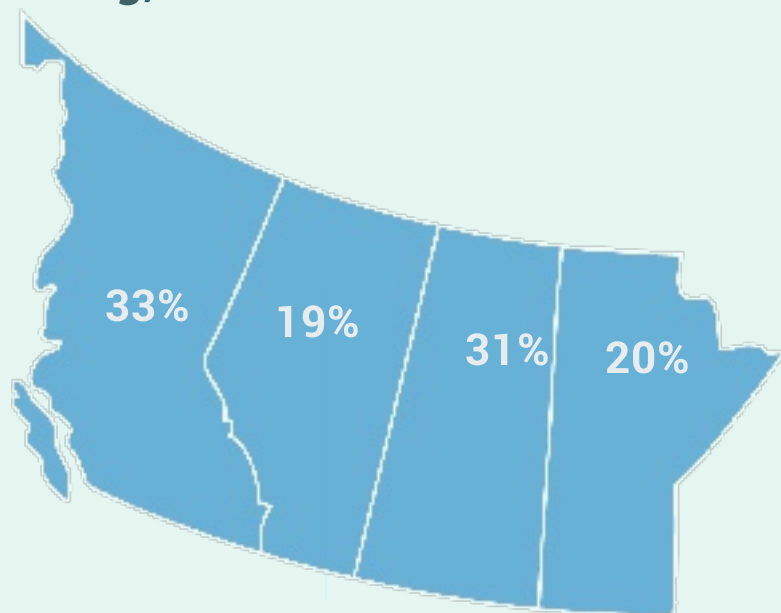
All provinces had a slightly net positive awareness of impacts of the forestry industry



Awareness of positive and negative impacts of forestry

Awareness of the mining industry

Low levels of familiarity with mining, B.C. is the most familiar



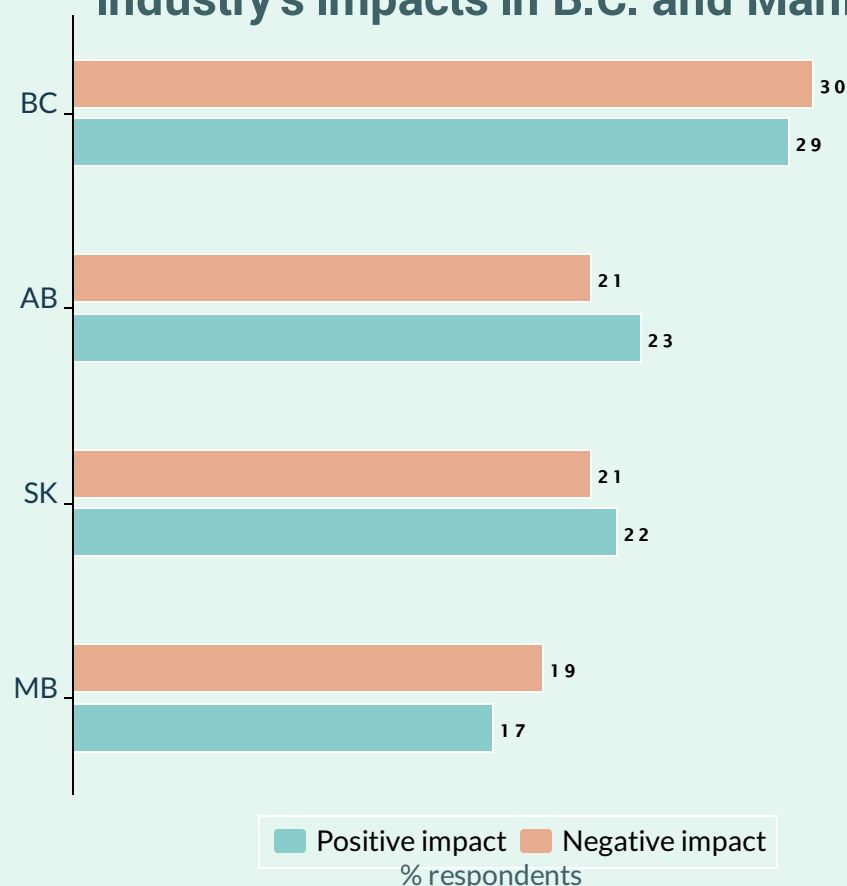
Three most common sources of information on the mining industry

1. Seen, heard or read news in the media
2. Seen, heard or read advertising
3. Talk with a family member, friend or colleague

Men twice as familiar as women

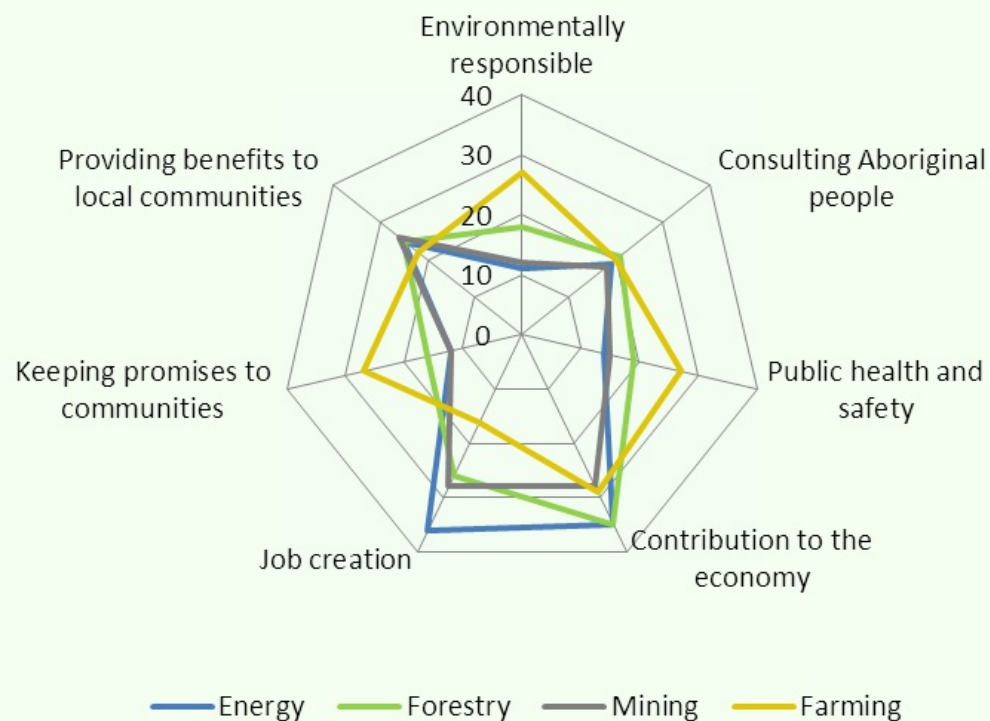


Net negative awareness of the mining industry's impacts in B.C. and Manitoba



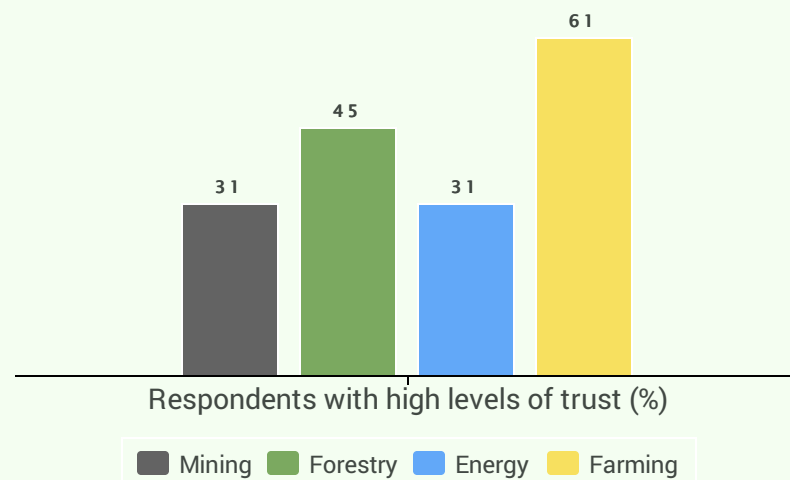
Awareness of positive and negative impacts of mining.

British Columbia respondents' performance ratings for resource industries

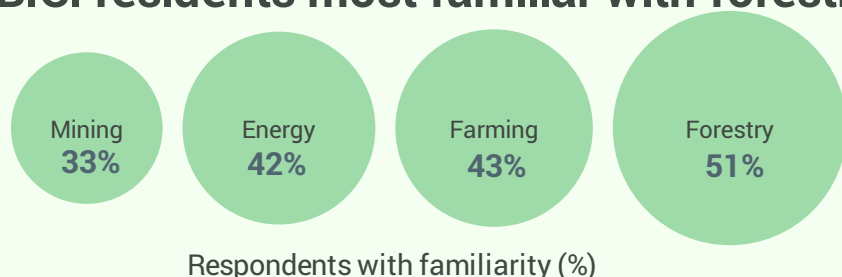


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

B.C. had more trust in farming than forestry



B.C. residents most familiar with forestry

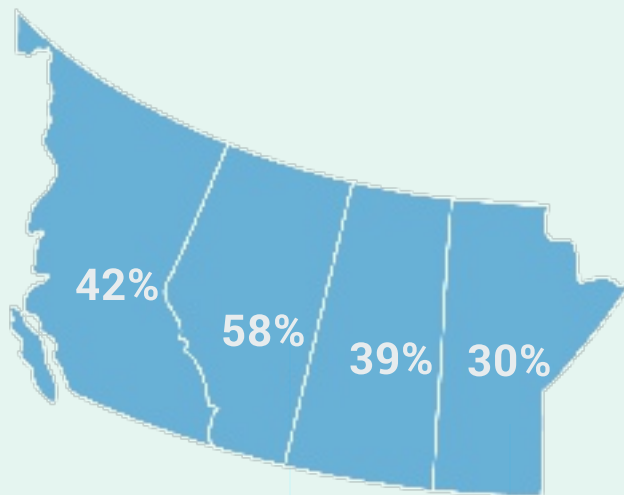


Like other provinces, farming had the highest trust in British Columbia. Like Manitoba, British Columbia had relatively lower levels of trust across the four industries compared to Alberta and Saskatchewan.

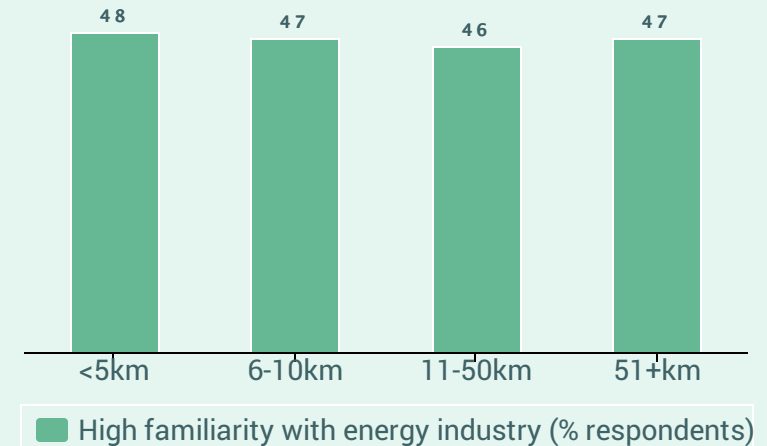
Familiarity with the energy industry

Demographic trends

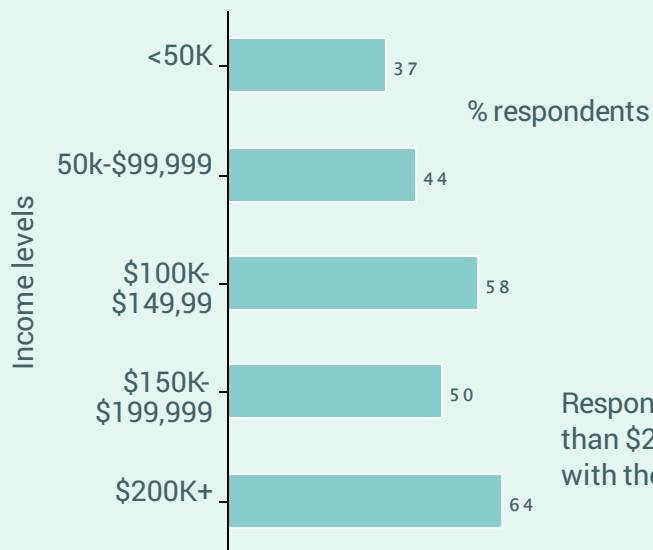
Albertans most familiar



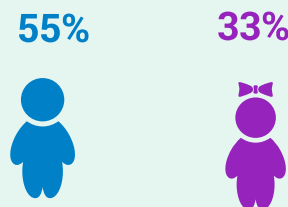
Proximity of residence to the energy industry does not impact familiarity



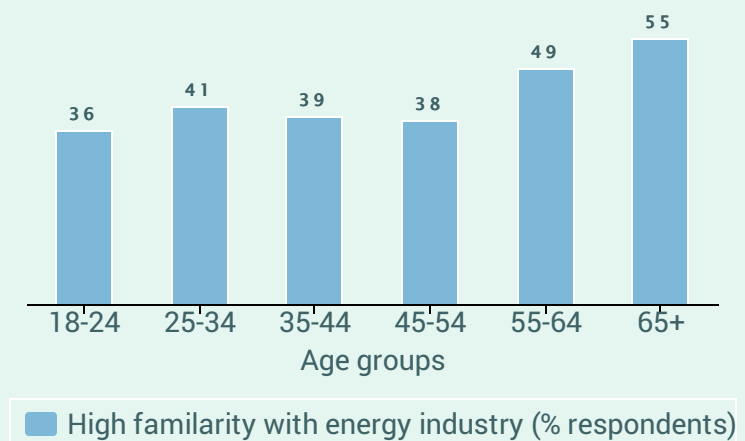
Level of familiarity by income



Men more familiar with energy



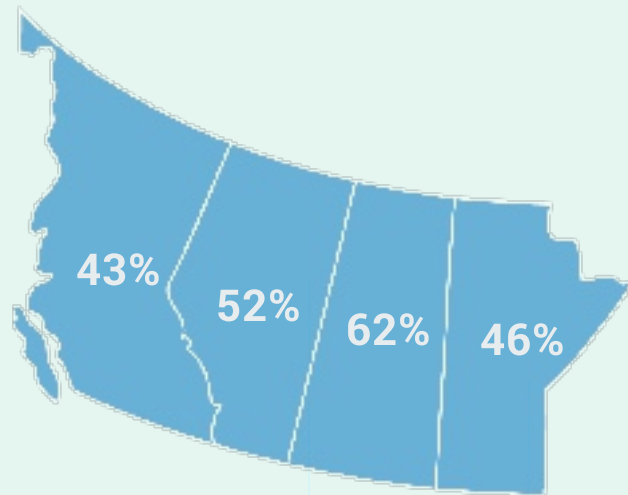
Familiarity increases with age



Familiarity with the farming industry

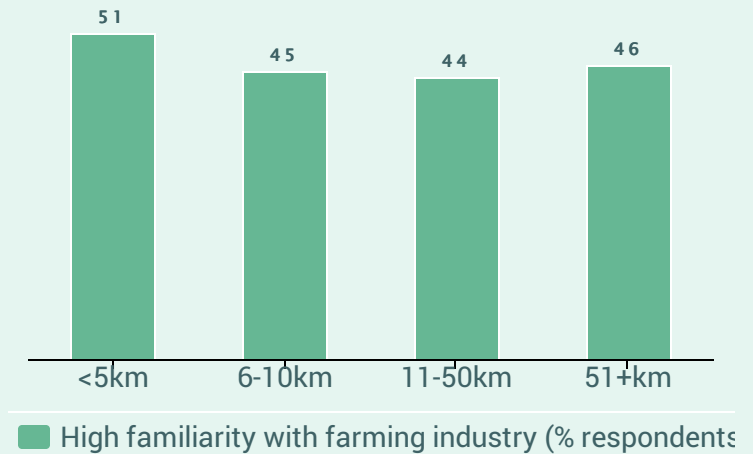
Demographic trends

Saskatchewan most familiar with farming

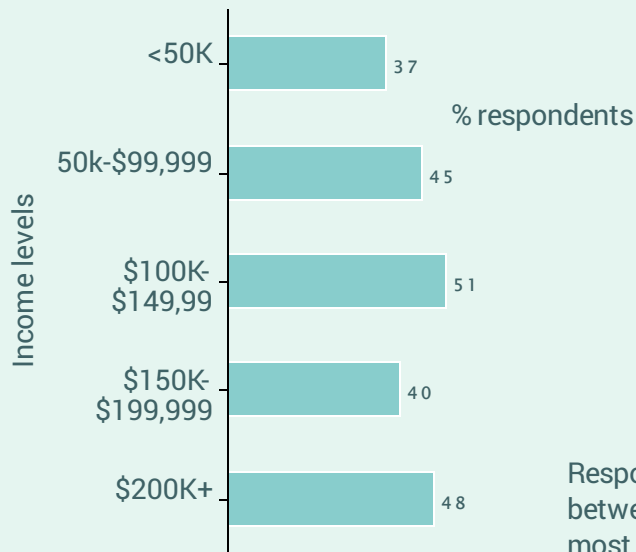


The respondents that lived closest to the farming industry had the highest levels of familiarity with the farming industry.

Higher familiarity levels for those living within 5km



Level of familiarity by income

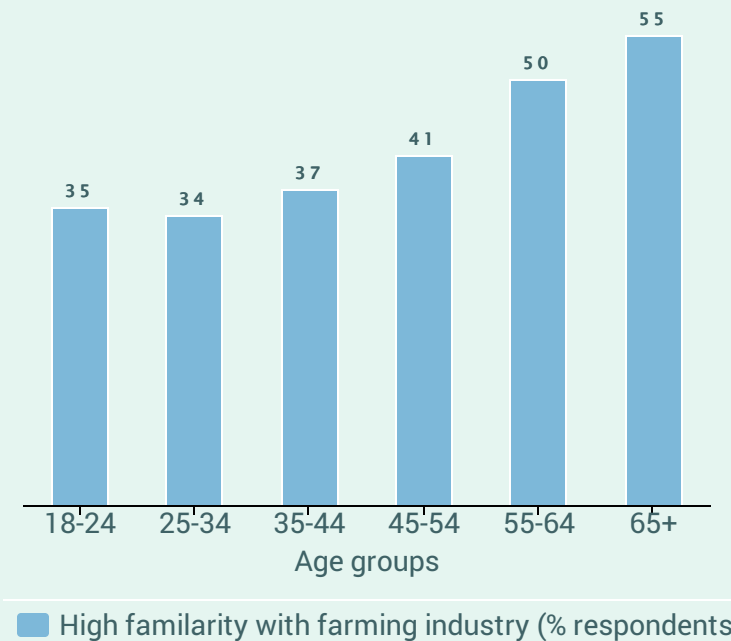


Men are likely to be more familiar with farming



Respondents with household incomes between \$100,000-\$150,000 were likely to be most familiar with the farming industry.

Familiarity increases with age

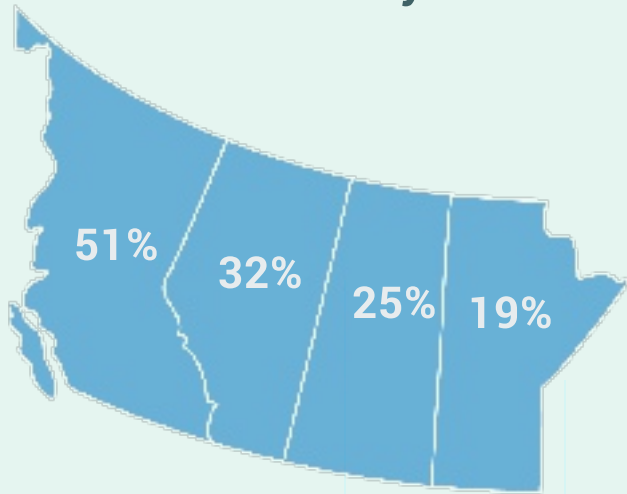


Familiarity with the forestry industry

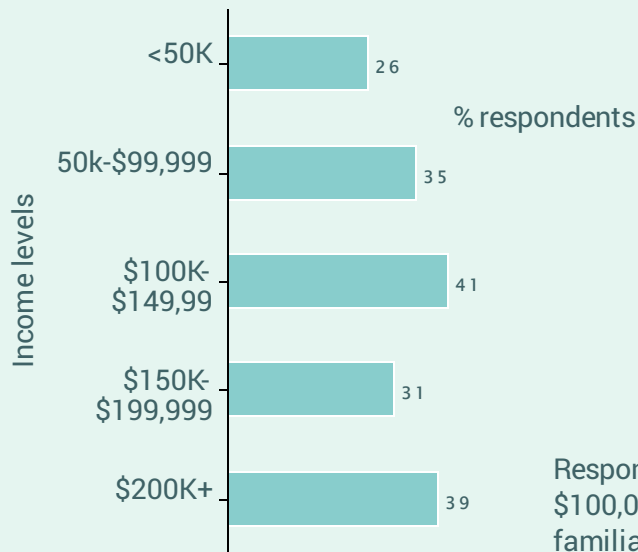
Demographic trends



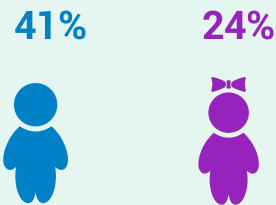
As expected, B.C. is the most familiar with forestry



Level of familiarity by income



Men are more familiar with forestry



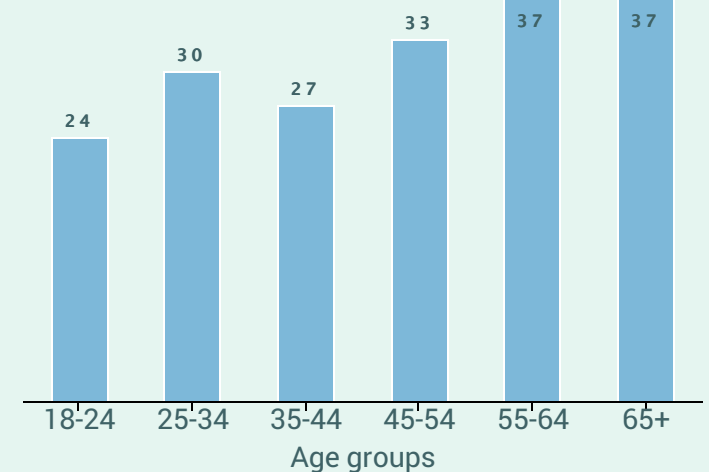
Respondents with household income between \$100,000-\$150,000 were likely to be the most familiar with the forestry industry

Proximity of residence to the forestry industry does not drive familiarity



High familiarity with forestry industry (% respondents)

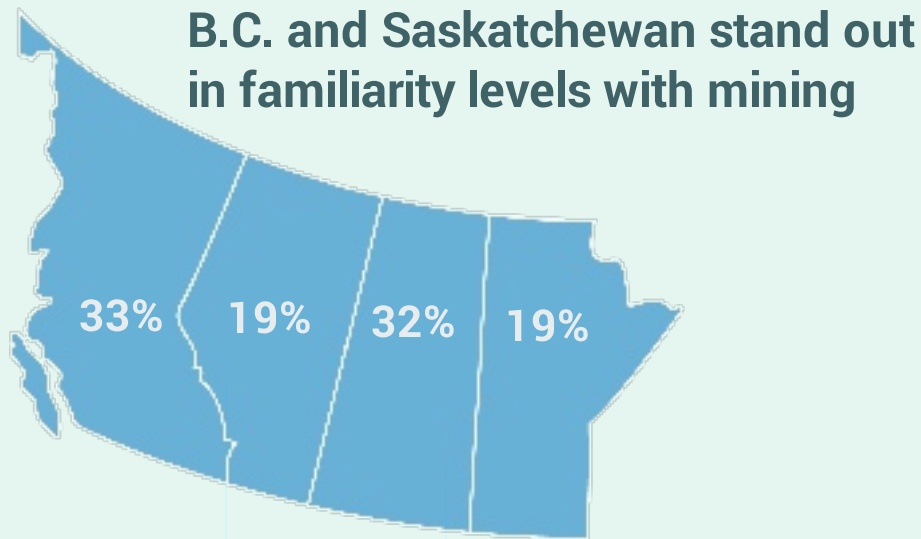
Familiarity levels increase with age



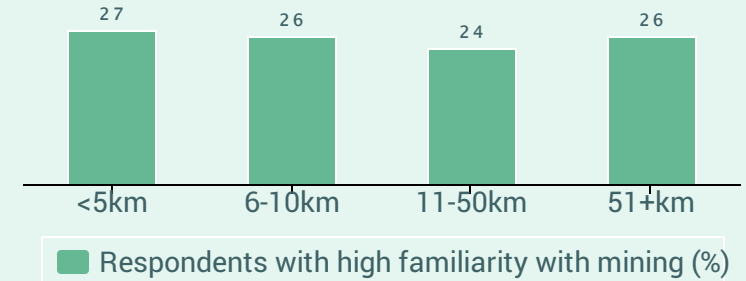
High familiarity with forestry industry (% respondents)

Familiarity with the mining industry

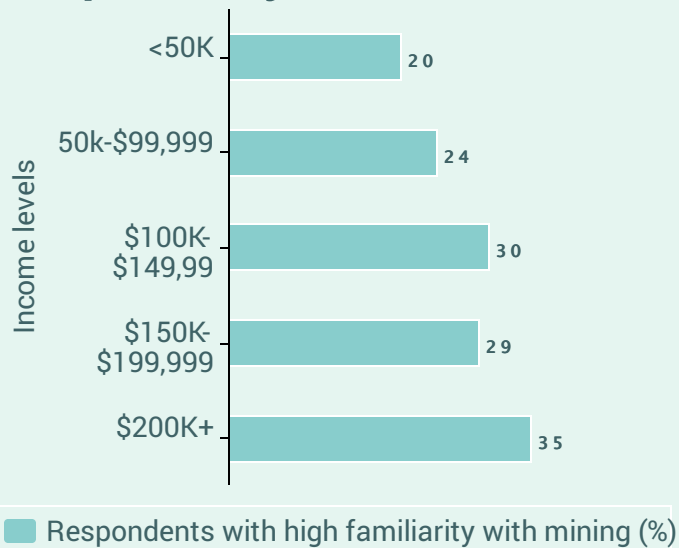
Demographic trends in western Canada



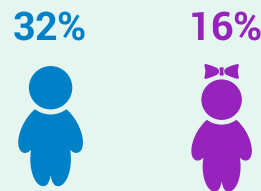
Proximity of residence to project had no impact on familiarity



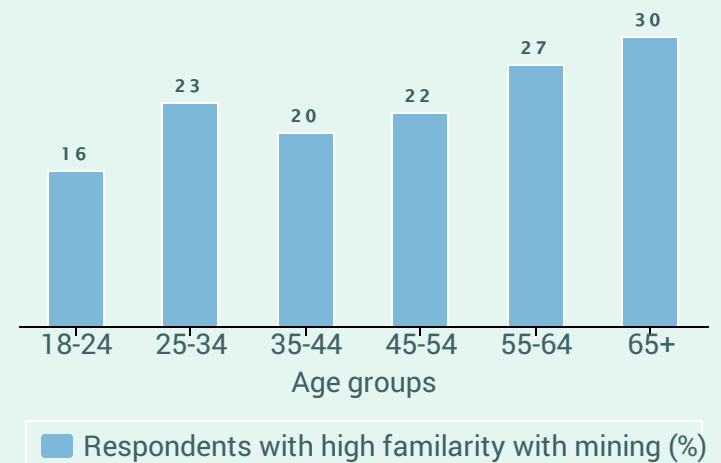
Income and familiarity positively correlated



Men twice as familiar with mining as women



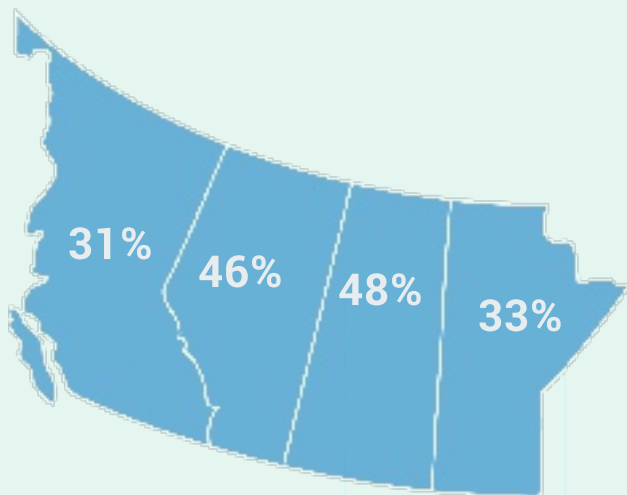
Familiarity increases with age



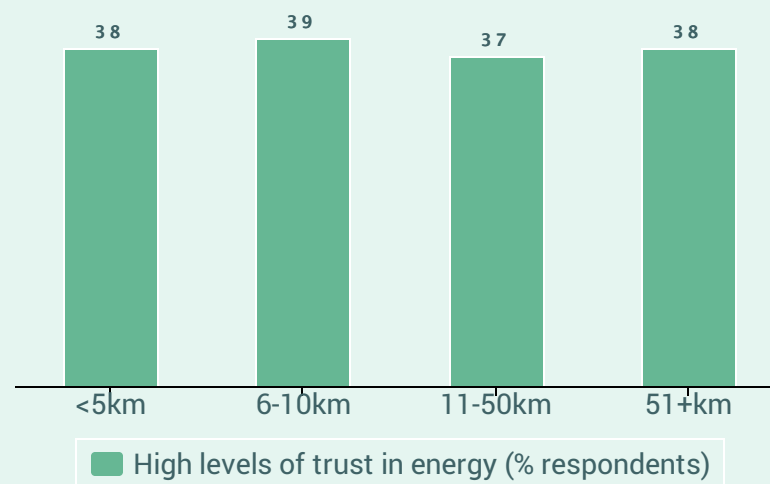
Trust in the energy industry

Demographic trends

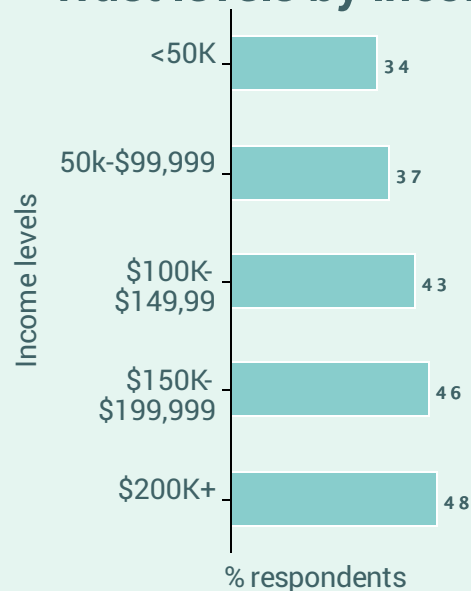
High levels of trust in Alberta and Saskatchewan



Proximity of residence has little impact on trust



Trust levels by income

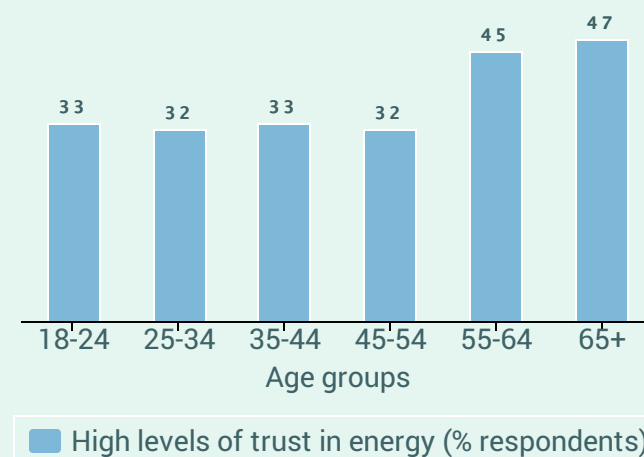


Men trust the energy industry more



Respondents with household income greater than \$100,000 were likely to be more trusting of the energy industry

Trust increases with age

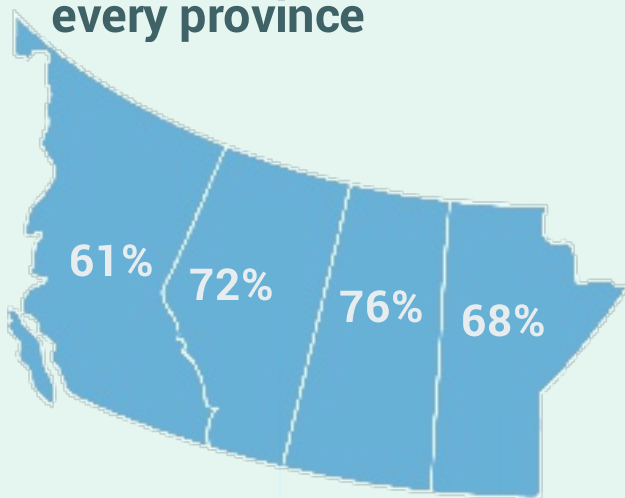


Trust in the farming industry

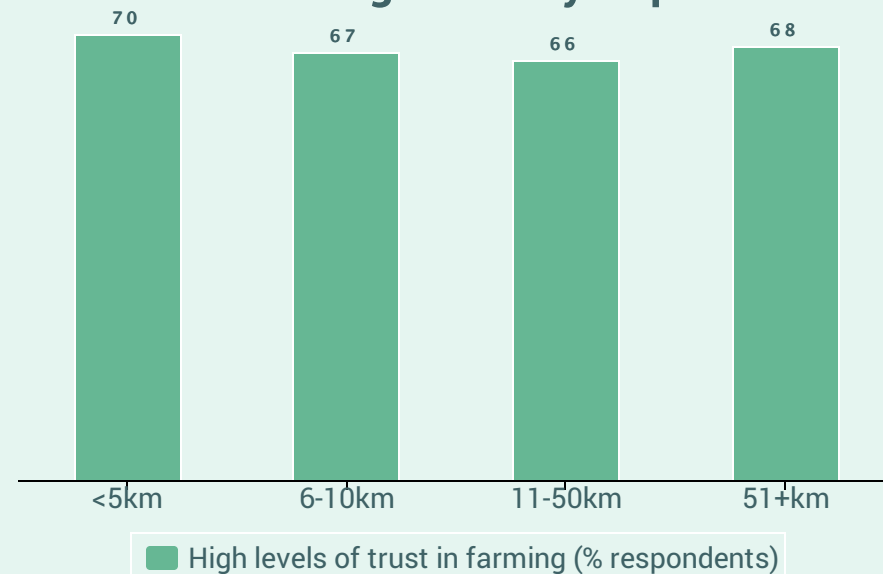
Demographic trends



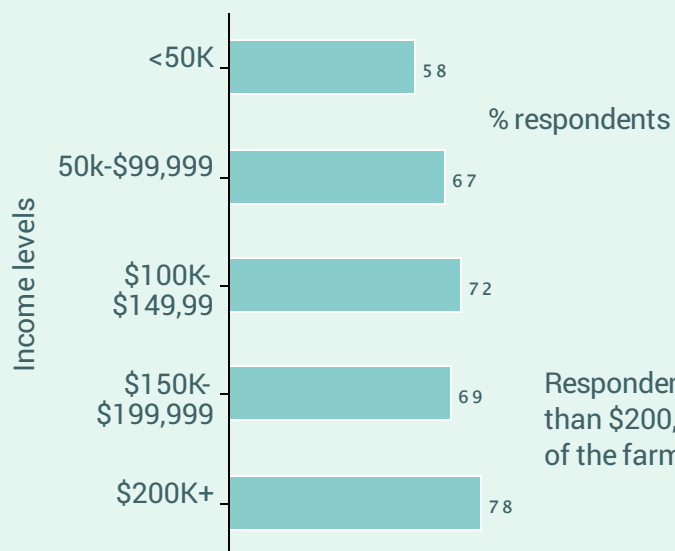
Trust levels high for farming in every province



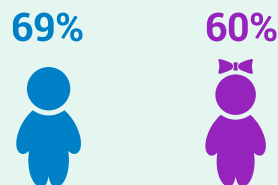
Living close to the farming industry doesn't significantly impact trust



Trust levels by income

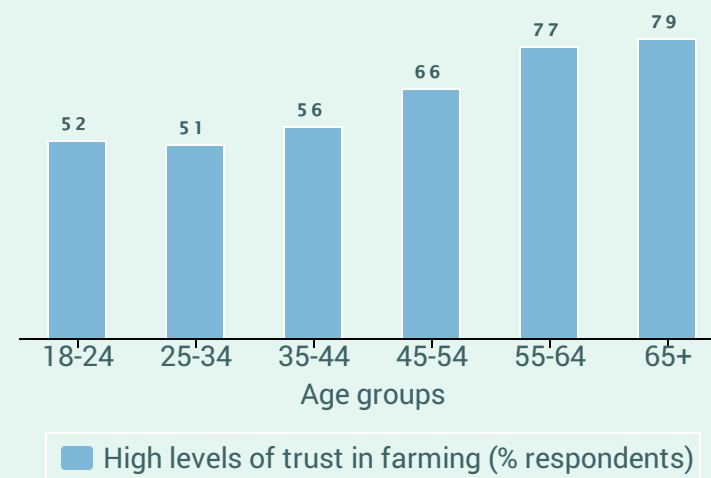


Men are more trusting of farming



Respondents with household income greater than \$200,000 were likely to be more trusting of the farming industry

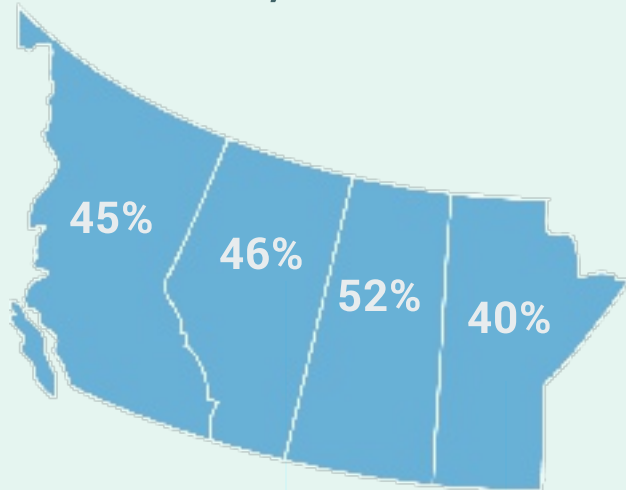
Trust increases with age



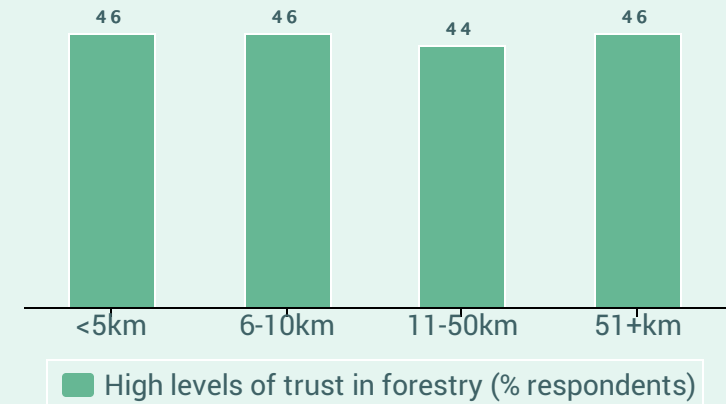
Trust in the forestry industry

Demographic trends

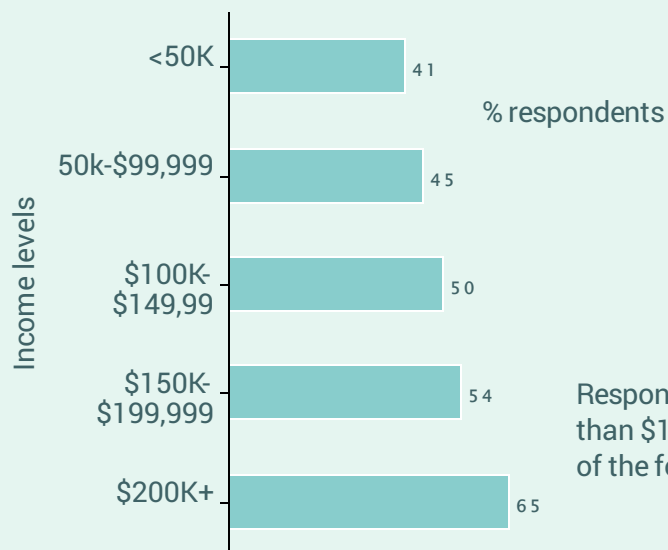
Trust for forestry is highest in Saskatchewan, lowest in Manitoba



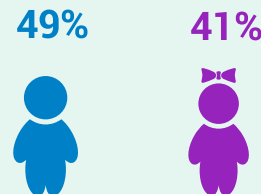
Proximity of residence to the forestry industry has little impact on trust



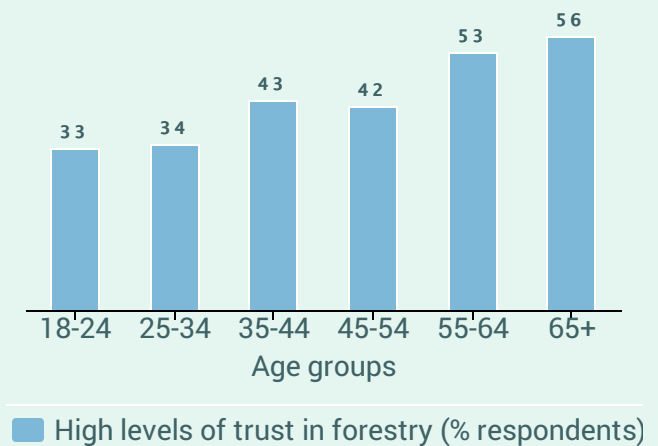
Trust levels by income



Trust higher among men



Trust levels increase with age

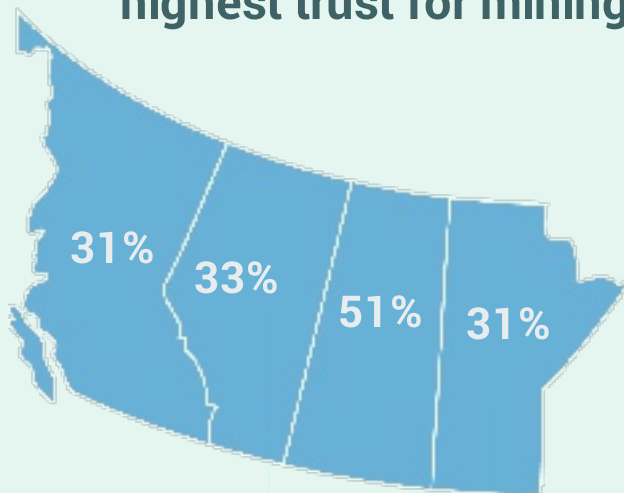


Respondents with household income greater than \$150,000 were likely to be more trusting of the forestry industry

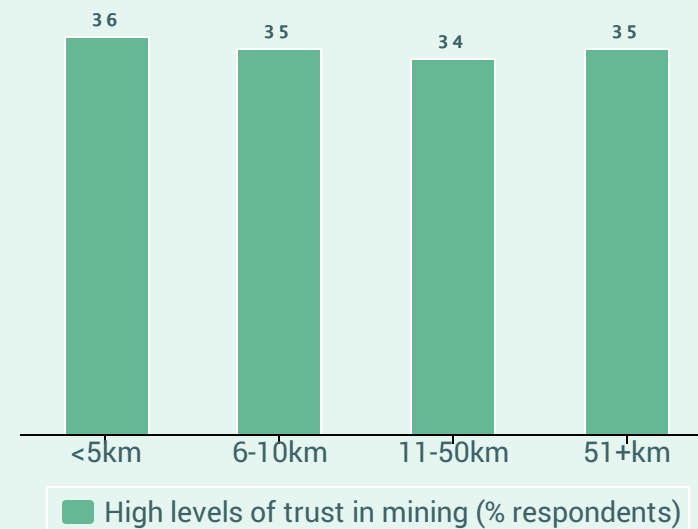
Trust in the mining industry

Demographic trends

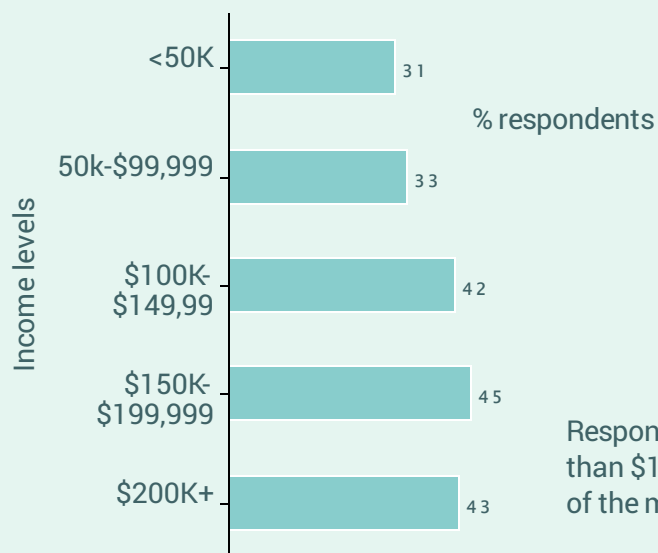
Saskatchewan has the highest trust for mining



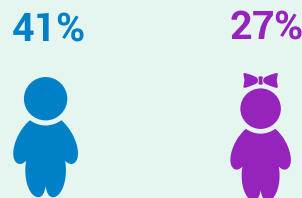
Living close to a mining project doesn't impact trust



Trust levels by income

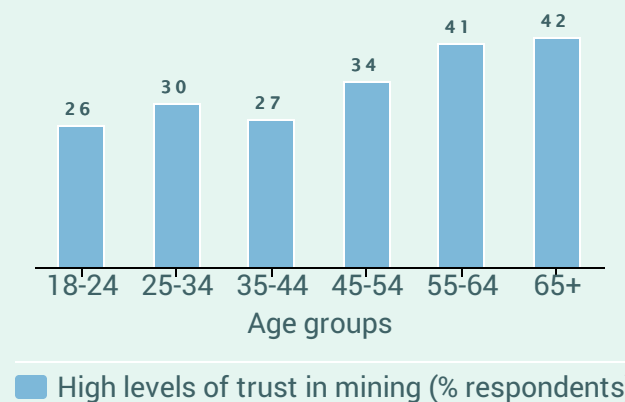


Men more trusting of the mining industry

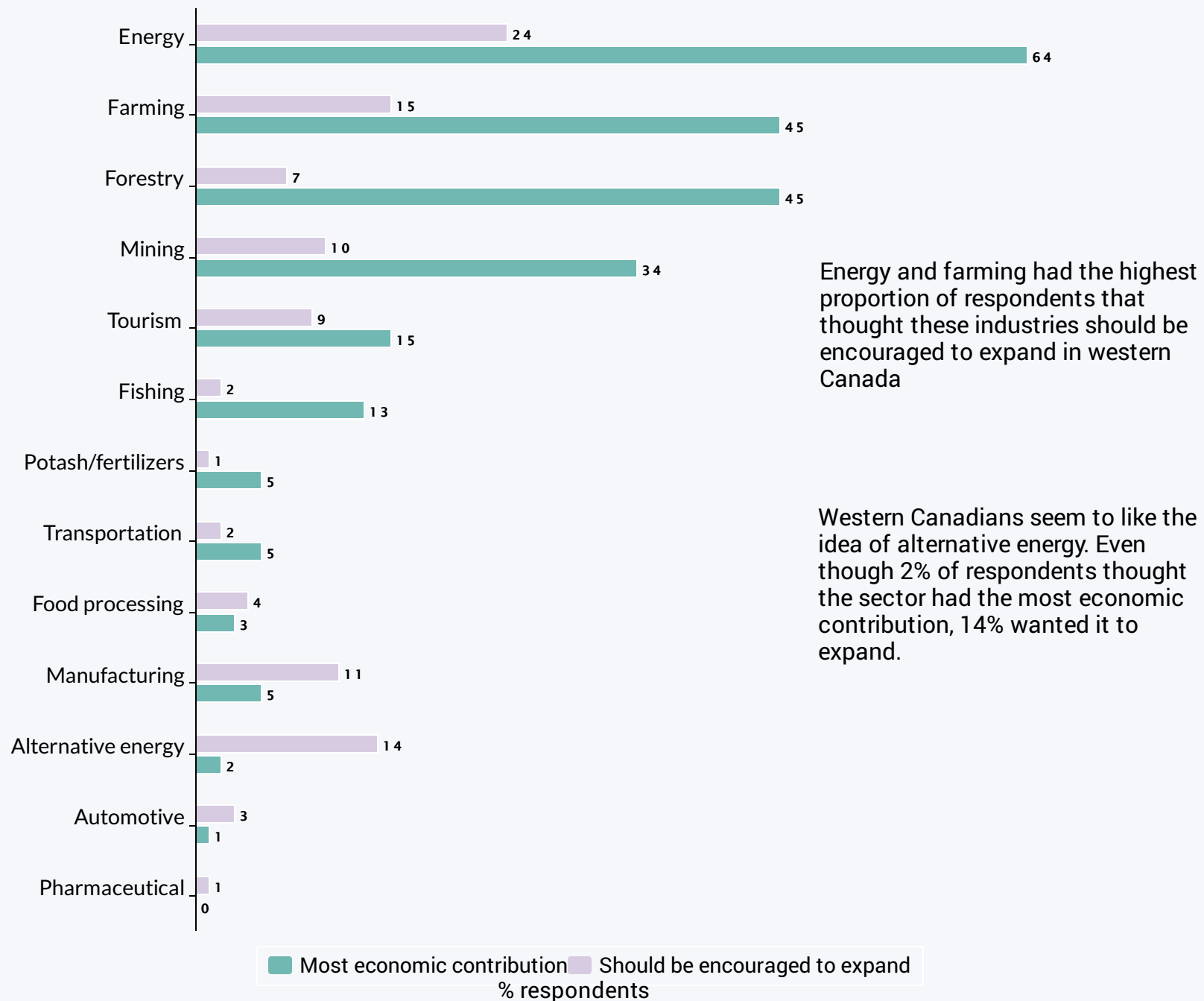


Respondents with household income greater than \$100,000 were likely to be more trusting of the mining industry

Trust levels increase with age



Resource industries are perceived to contribute the most to the western Canadian economy

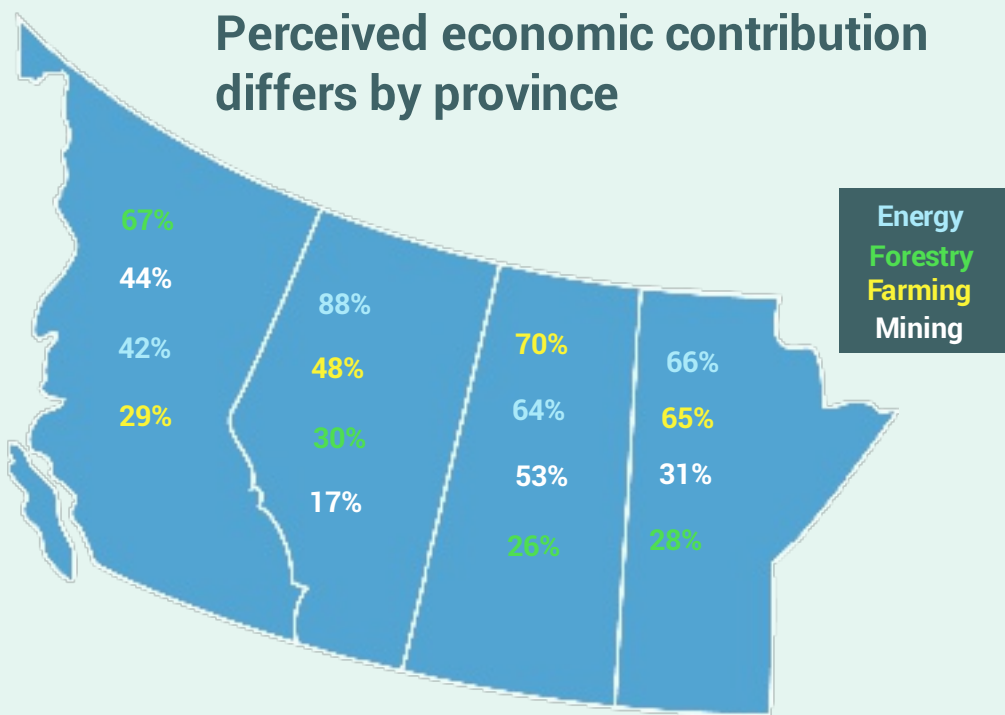


Contribution to the economy

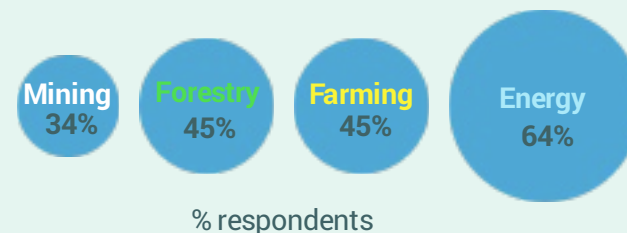
Public perception of the economic benefits of resource industries



Perceived economic contribution differs by province



Energy stands out in perception of contributing significantly to the western Canadian economy



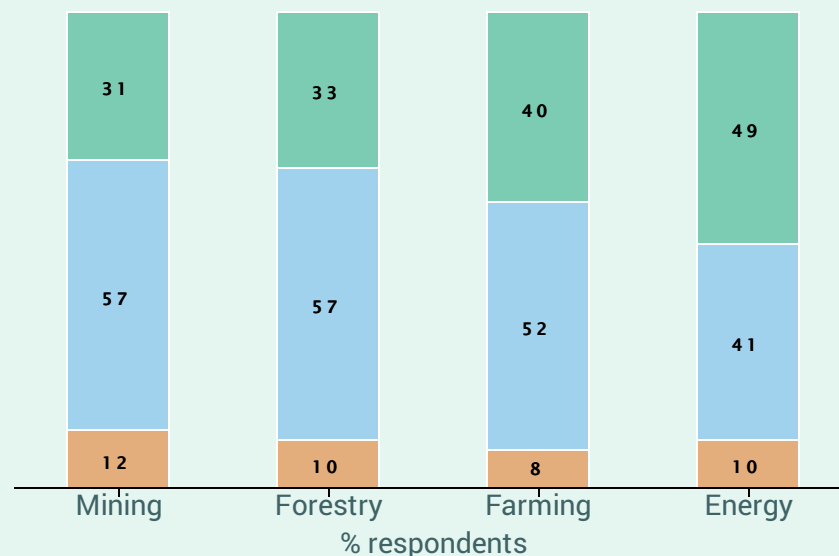
1 Energy Strong reason for trust

2 Mining "Good for the economy / creates jobs" was among the top 3 reasons given for trusting energy, mining and forestry, but 10th reason for trusting the farming industry.

3 Forestry



Performance ratings for contribution to the overall economy

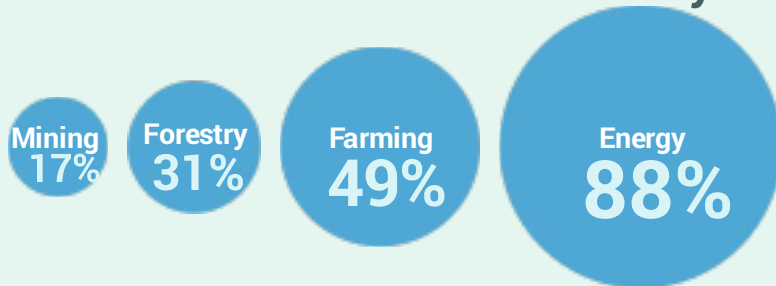


Contribution to the economy: Alberta

Public perception of the economic benefits of resource industries



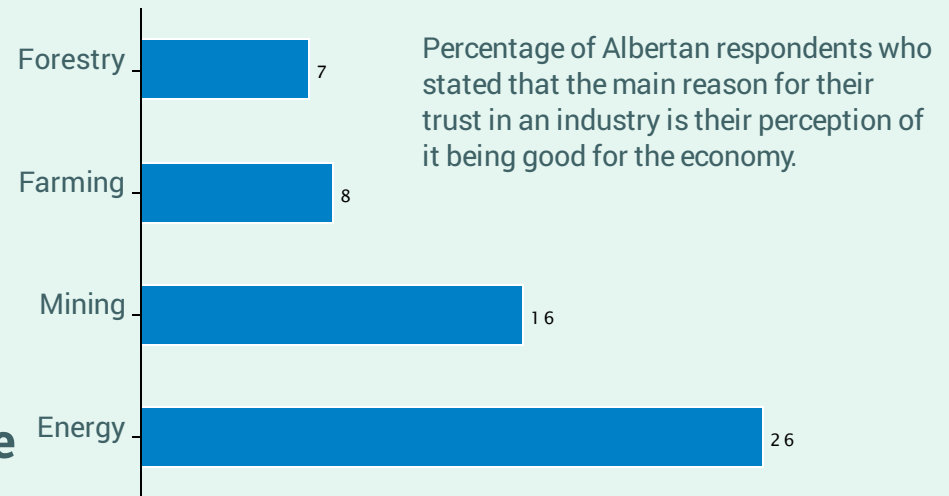
Alberta sees energy as the largest contributor to the western Canadian economy



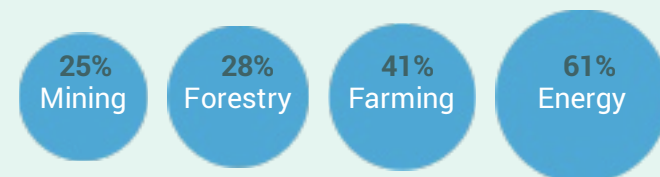
Energy has the highest perceived performance ratings for contribution to overall economy



Economic benefits as a main reason for trust in industry



Energy perceived as top contributor of stable, high quality employment in western Canada

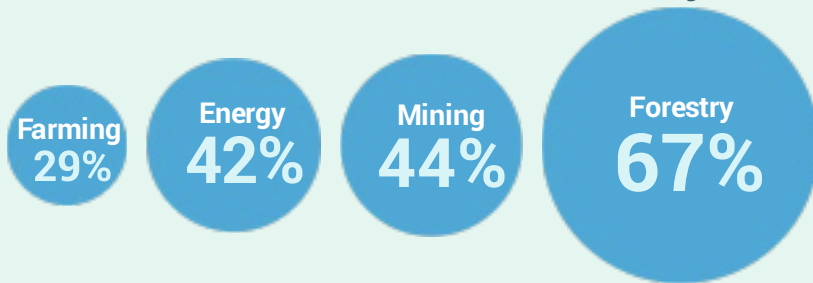


Contribution to the economy: British Columbia

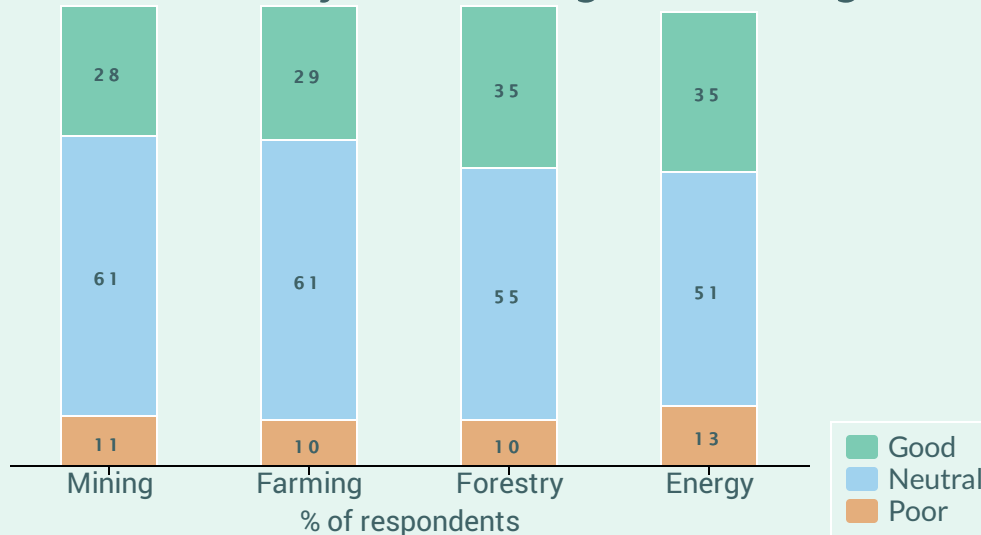
Public perception of the economic benefits of resource industries



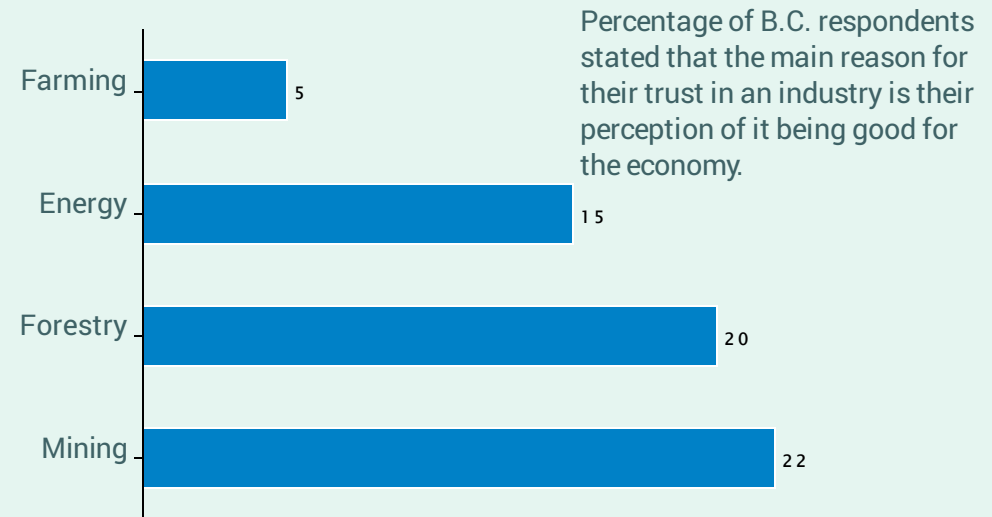
B.C. sees forestry as the largest contributor to the western Canadian economy



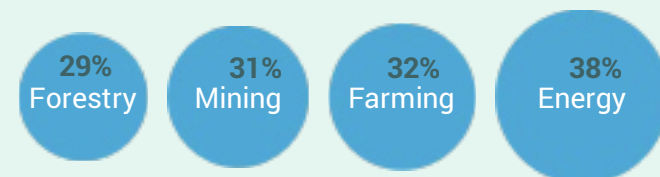
Forestry and energy have higher perceived performance ratings for contribution to the overall economy than mining and farming



Economic benefits as a main reason for trust in industry



Energy perceived as top contributor of stable, high quality employment in western Canada

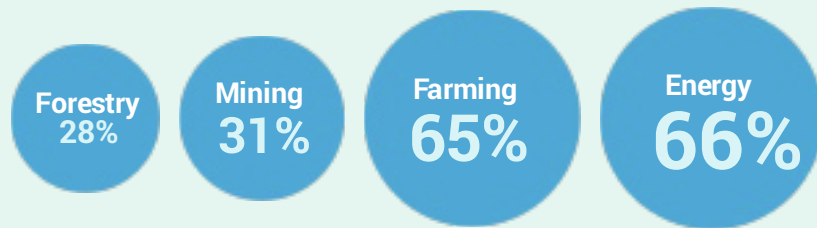


Contribution to the economy: Manitoba

Public perception of the economic benefits of resource industries



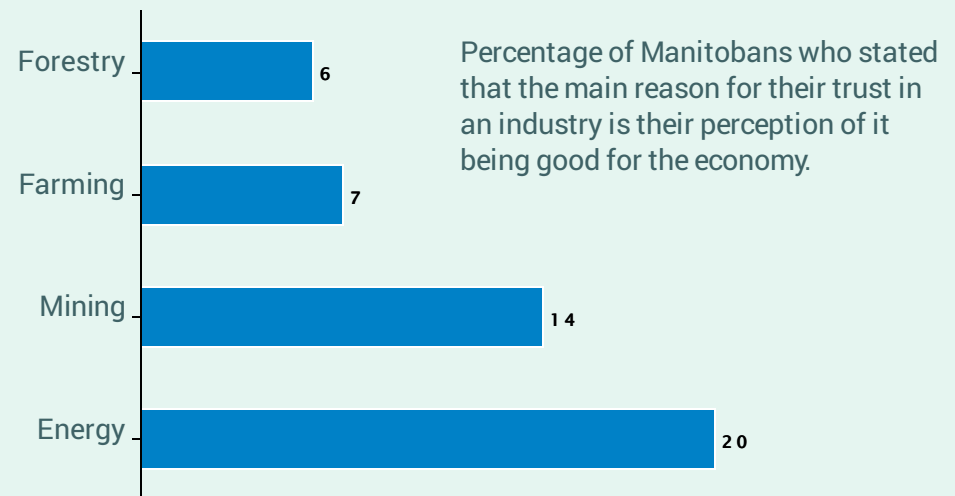
Manitoba sees energy as the largest contributor to the western Canadian economy



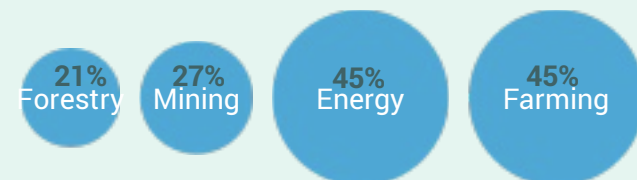
Energy and farming have the highest perceived performance ratings for contribution to the overall economy



Economic benefits as a main reason for trust in industry



Farming and energy perceived as top contributors of stable, high quality employment in western Canada

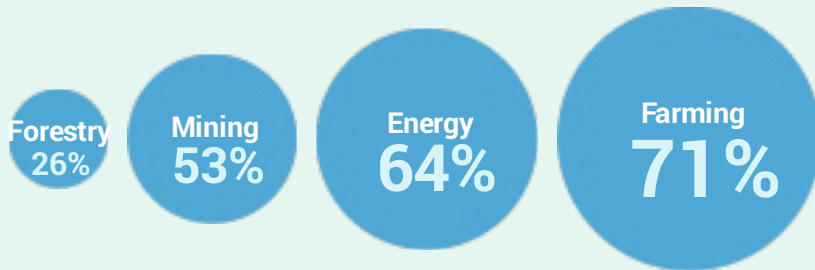


Contribution to the economy: Saskatchewan

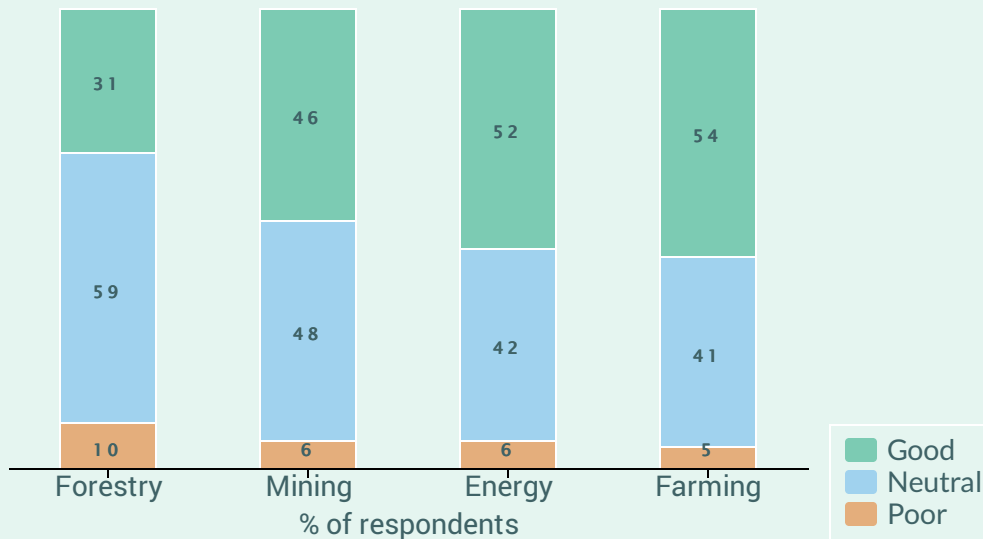
Public perception of the economic benefits of resource industries



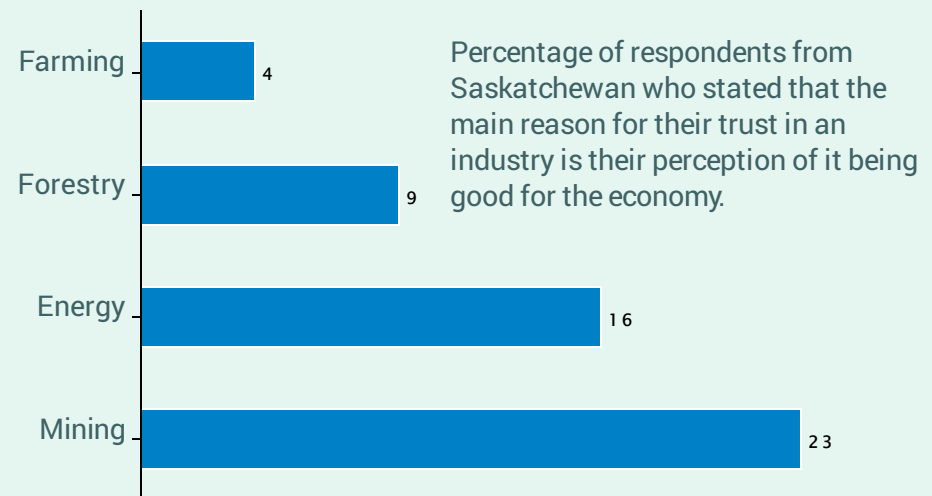
Saskatchewan sees farming as the largest contributor to the western Canadian economy



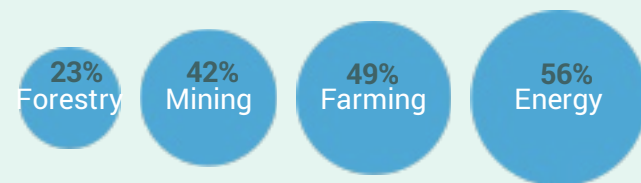
Energy and farming have the highest perceived performance ratings for contribution to the overall economy



Mining rated highest on trust in industry



Energy perceived as top contributor of stable, high quality employment in western Canada



Public perceptions of the energy industry

Public support for resource industries

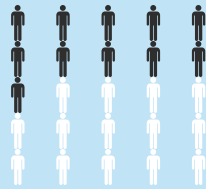


1 Seen as weak on environment



15% of western Canadians thought the energy sector was environmentally responsible, and 33% thought the industry does poorly at this metric.

2 Perceived as job creator



46% of respondents thought the energy industry does well at creating jobs, while 11% thought the industry does poorly.

3 High familiarity



Energy was among the top 3 industries respondents were most familiar with. 46% of respondents felt they knew the energy industry well, while 54% said they knew little to nothing.

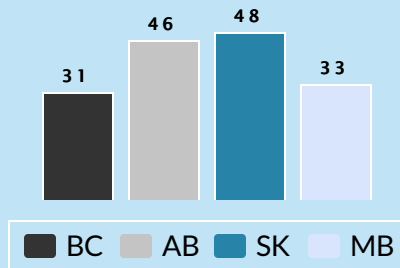
4 Not seen to keep promises



15% of respondents thought energy was doing a good job at keeping its commitments. 28% thought energy performs poorly on this metric.

5 Trust varies by province

% of respondents who trust the industry



Trust levels varied slightly across provinces for the energy industry. British Columbia had the lowest trust levels and Saskatchewan had the highest.

6 Rated low on consultation



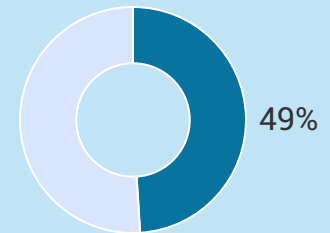
21% of western Canadians thought the energy industry does well at consulting Aboriginal people, while 30% thought energy does poorly.

7 Public health and safety



16% of western Canadians thought the energy industry does well at protecting public health and safety, and 29% thought the industry performs poorly at this metric.

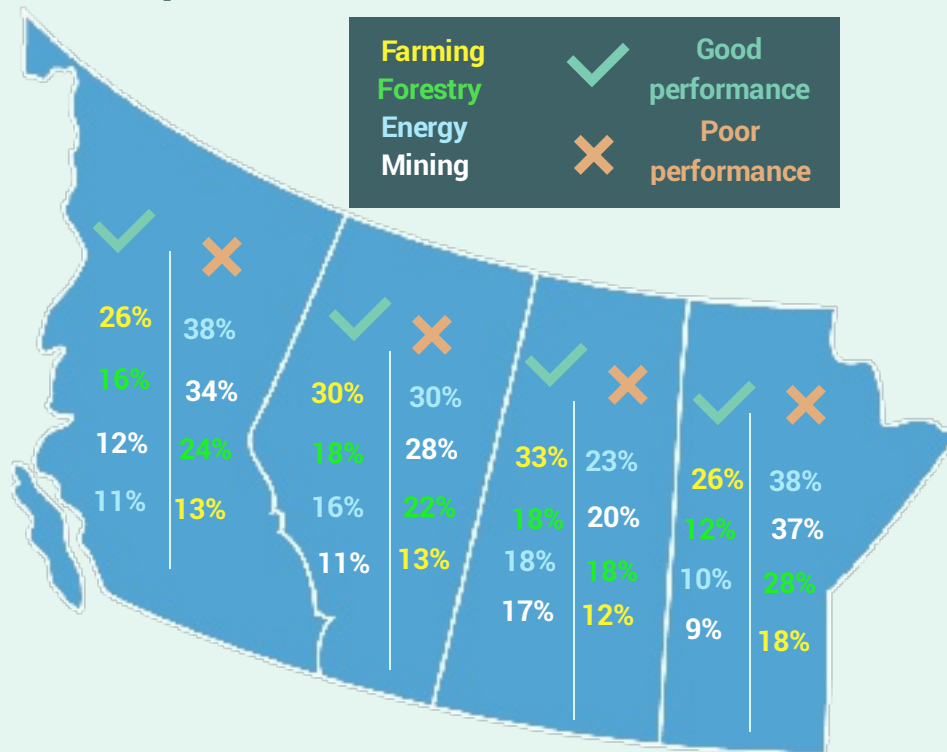
8 Perceived as economic contributor



About 49% of respondents thought the energy industry was doing a good job contributing to the economy, and 10% thought the industry does a poor job.

Minimizing environmental impact on local communities

Farming perceived as best at minimizing environmental impact on local communities



2nd
out of seven

Respondents said #2 most important issue related to Canadian resource industries, and among top reasons to trust and mistrust them.

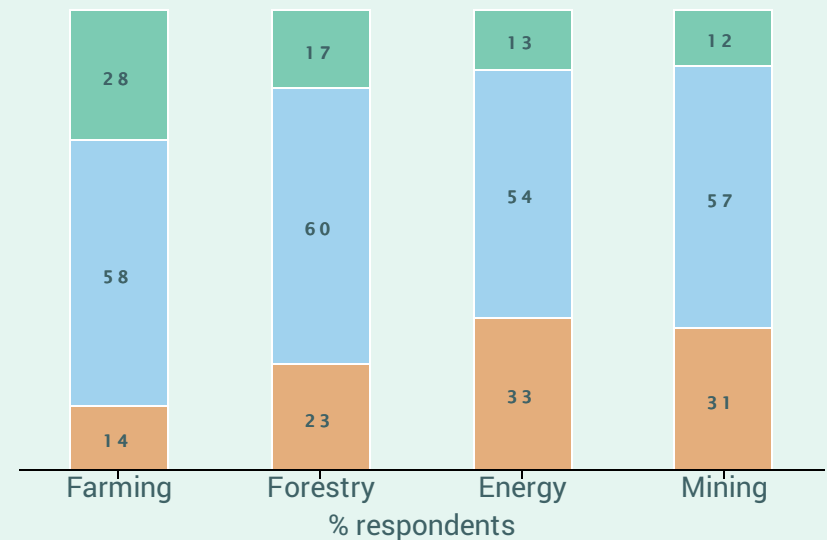
Environment a top driver of trust

1
2
3

Among top 2 drivers of trust for energy, mining and forestry industries. 6th for farming.

Good
Neutral
Poor

Performance ratings by industry

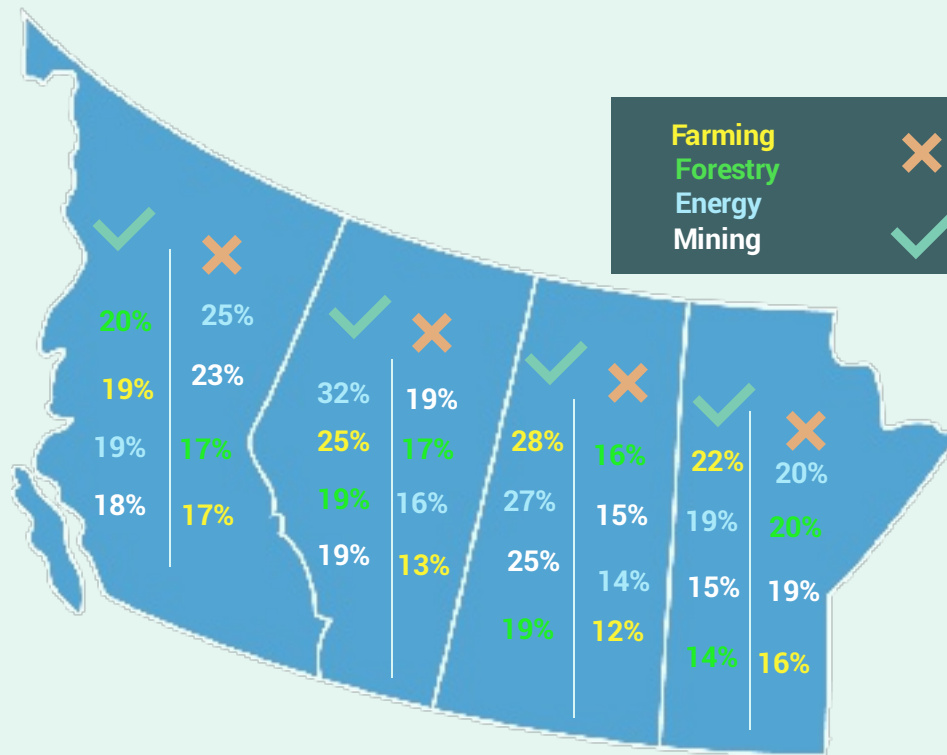


Fair distribution of benefits/jobs/business opportunities in communities

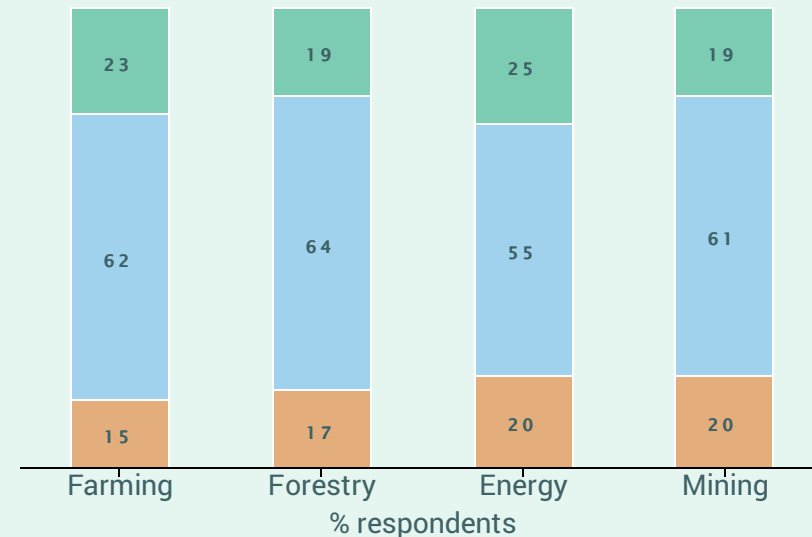
Perceived performance ratings for fair opportunity distribution of economic benefits differ by province

4th
out of seven

10% of western Canadians cited it as the most important issue.



Performance ratings by industry



Not the highest driver of trust

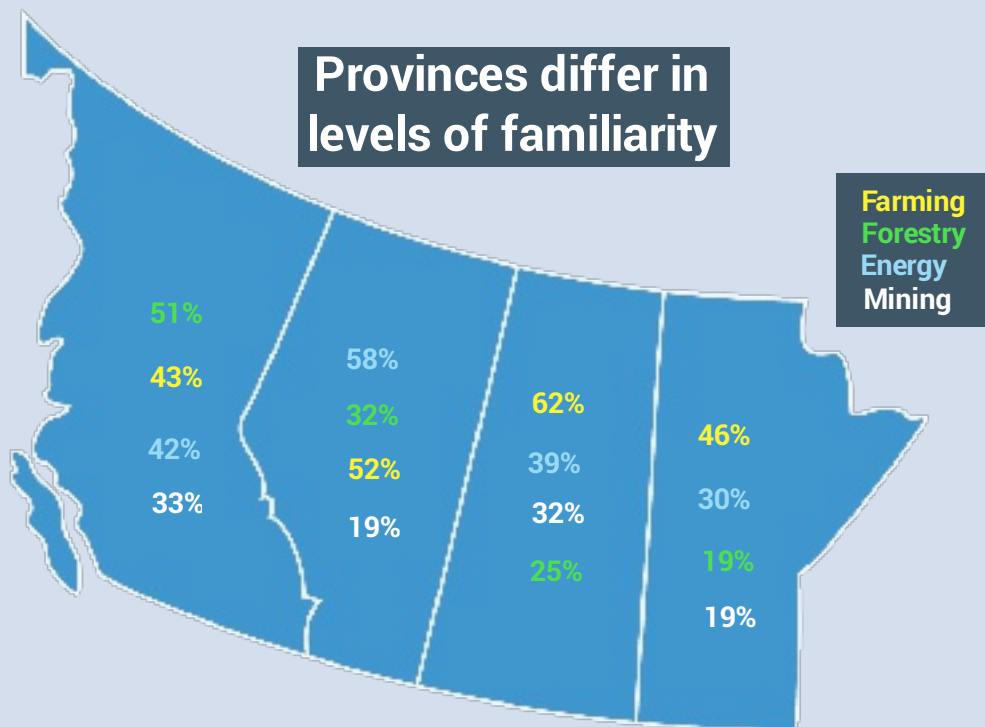
1
2
3

Fair opportunity distribution ranked as the 9th most important driver of trust for farming. It ranked 10th for the energy and mining industries, and 11th for forestry.

Familiarity with resource industries

Public support for resource industries

Provinces differ in levels of familiarity



Age



There is a trend that older respondents are more familiar with natural resource industries than younger ones.

Income



Respondents with a higher household income are usually more familiar with natural resource industries than those with a lower household income.

Men more familiar than women

44%



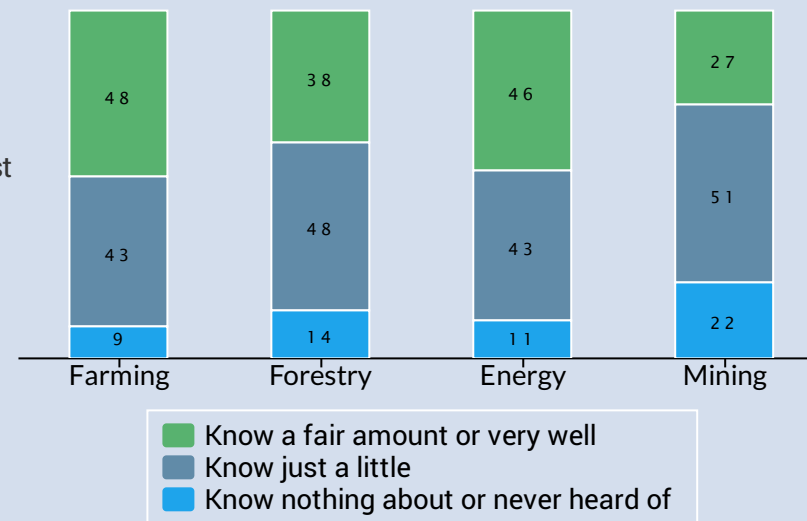
27%



Respondents knew the least about mining and the most about energy and farming.

Most familiarity with farming and energy, least with mining

% respondents



Public perceptions of the farming industry

Public support for the farming industry

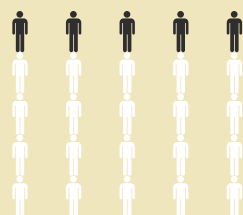


1 Rated best at environmental responsibility



29% of western Canadians thought the farming sector was environmentally responsible and 13% believed the industry performs poorly on this metric. This was the best performance score across the 4 resource industries.

2 Not strong at job creation



17% of respondents thought farming does well at job creation while 21% believed that farming does poorly.

3 High familiarity



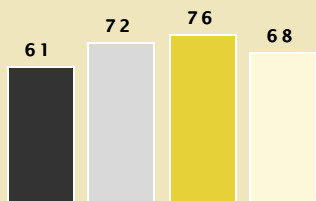
48% of respondents felt they knew the farming industry well. 52% thought they knew nothing or very little about the industry. Farming was the second most familiar industry within western Canada.

4 Good at keeping promises to communities



28% of respondents thought farming does well at keeping its commitments. 13% thought farming performs poorly on this metric.

5 Highly trusted



■ BC ■ AB ■ SK ■ MB

% of respondents who trust the industry

Farming was the most trusted resource industry.

6 Consulting Aboriginal people



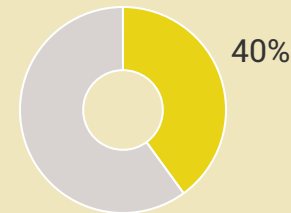
18% of western Canadians thought the farming industry does well at consulting Aboriginal people, while 24% thought farming does poorly.

7 Public health and safety



28% of western Canadians thought the farming industry does well at protecting public health and safety, and 14% thought the industry performs poorly at this metric.

8 Contribution to the economy



About 40% of respondents thought the farming industry does a good job contributing to the economy, and 8% thought the industry does a poor job.

Public perceptions of the forestry industry

Public support for resource industries

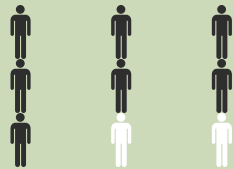


1 Mixed reviews on green performance



20% of western Canadians thought the forestry sector does a good job at being environmentally responsible, and 22% thought forestry performs poorly on this metric.

2 Job creation



24% of respondents thought forestry does good at job creation, while 13% thought the industry does poorly.

3 Familiarity with the industry



38% of respondents felt they knew the forestry industry well. 62% thought they knew nothing or very little about the industry.

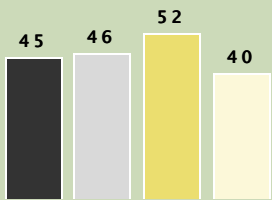
4 Not rated well on promises



16% of respondents thought forestry does a good job of keeping its commitments. 20% thought forestry performs poorly on this metric.

5 Trust in the industry

% of respondents who trust the industry



BC AB SK MB

Trust levels didn't vary too much across provinces for the forestry industry. But Saskatchewan had the highest trust levels.

6 Mixed ratings on consultation



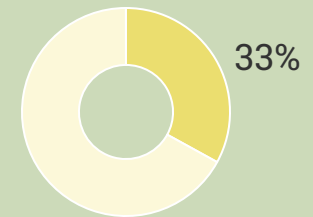
21% of western Canadians thought the forestry industry does well at consulting Aboriginal people, while 24% thought forestry does poorly.

7 Public health and safety



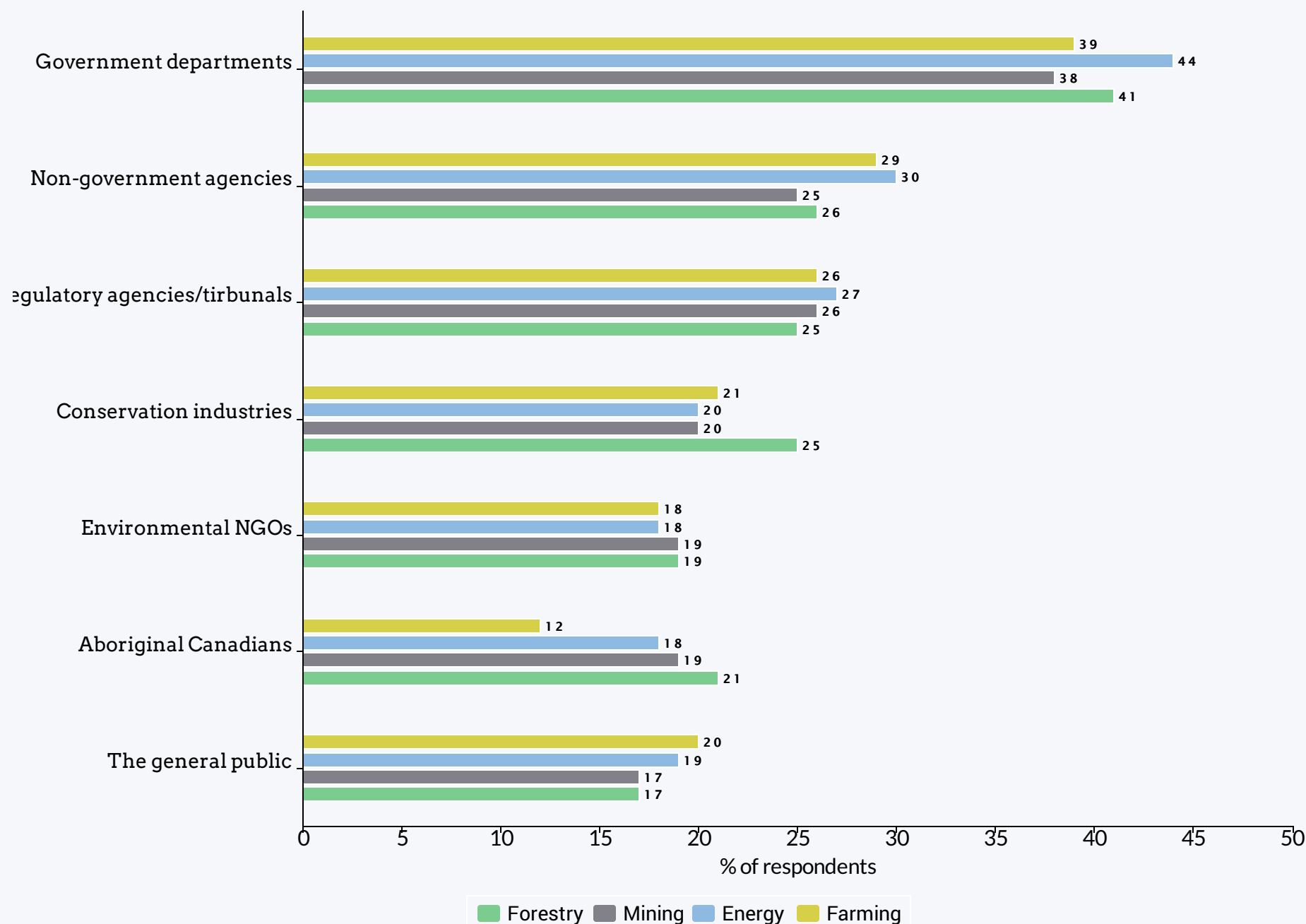
20% of western Canadians thought the forestry industry does well at protecting public health and safety, and 19% thought the industry performs poorly at this metric.

8 Contribution to the economy



About 33% of respondents thought the forestry industry was doing a good job contributing to the economy, and 10% thought the industry does poorly.

Ability of organizations to influence industries in western Canada

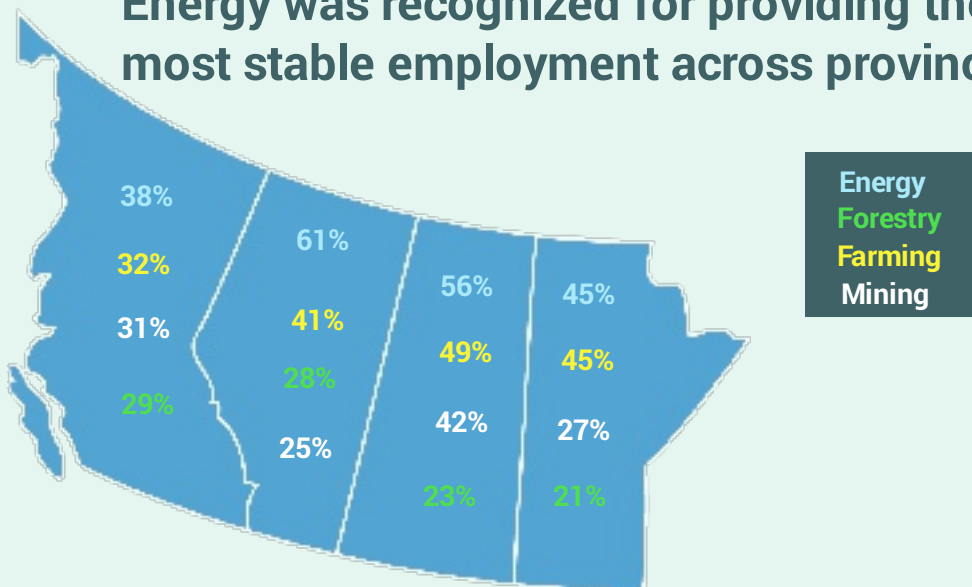


Ipsos Canada on behalf of the Canada West Foundation conducted a survey in April 2014 to understand western Canadian perceptions of resource industries. The study had 3,038 respondents across the western provinces, including Ontario and select findings are presented above. The full results of the survey are available at www.cwf.ca

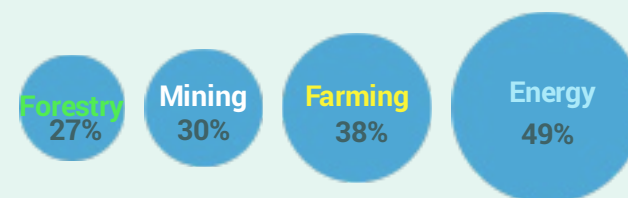
Job creation

Public perception of the economic benefits of resource industries

Energy was recognized for providing the most stable employment across provinces



Energy stands out in perception of providing stable employment

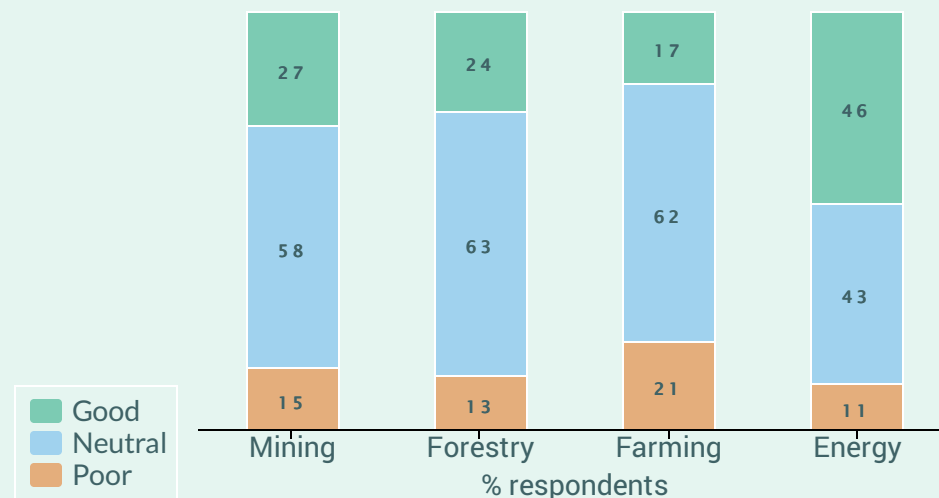


- 1 **Energy**
- 2 **Mining**
- 3 **Forestry**

Strong reason for trust

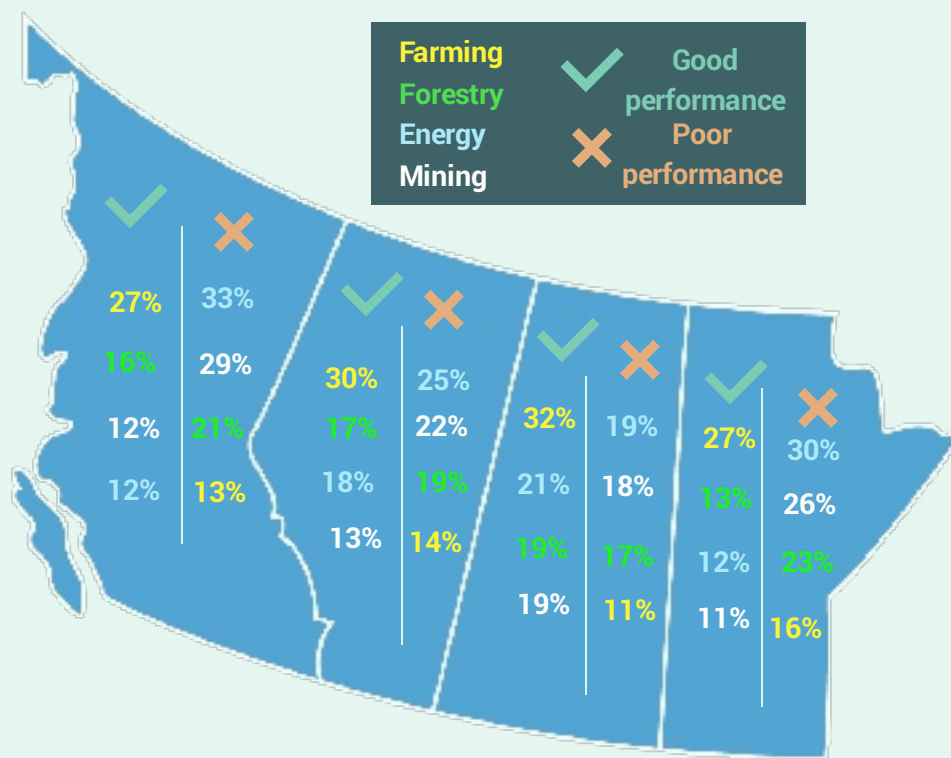
Creating jobs and overall economic contribution was among the top 3 reasons given for trusting the energy, mining and forestry industries, but tenth most common reason for trusting farming.

Performance ratings for job creation



Keeping promises & commitments to local communities: a top driver of trust

Respondents gave farming best performance ratings, while energy and mining received the lowest ratings



5th
out of seven

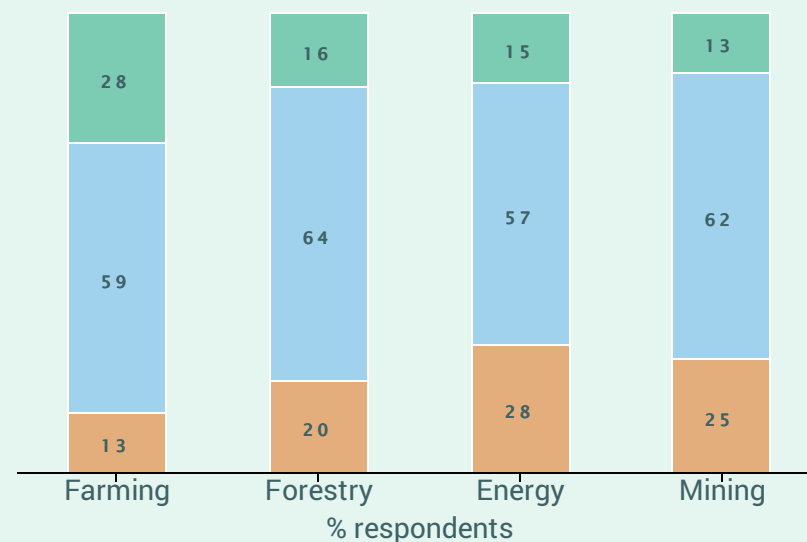
Ranked as 5th most important issue related to resource industries: 9% of respondents said most important issue.

#1 Most important driver of trust for farming, energy and forestry. 2nd for mining industry.

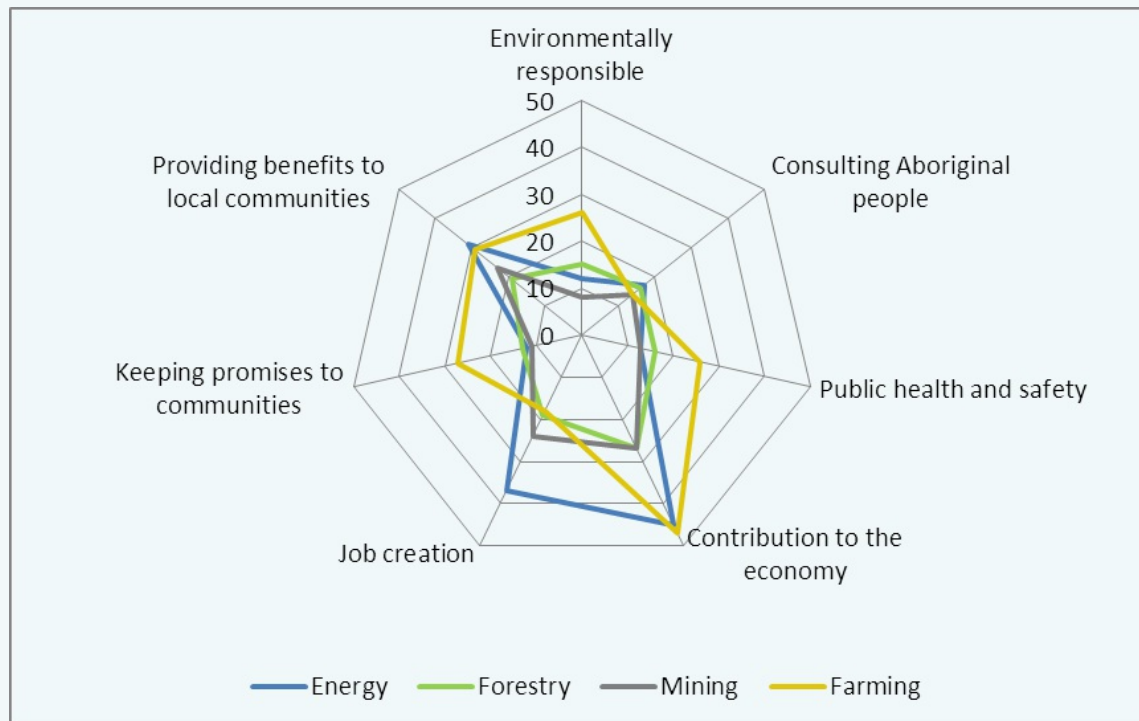
To improve levels of trust, industry needs better perceived performance on this indicator.



Performance ratings by industry

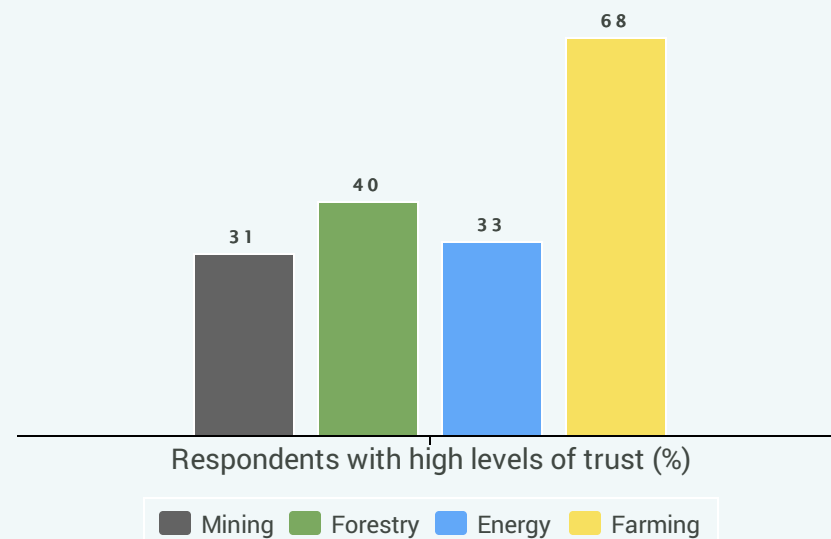


Manitoba respondents' performance ratings for resource industries

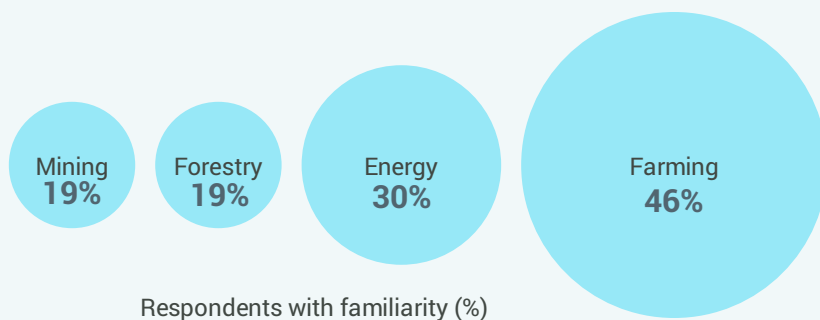


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

Farming was the most trusted industry in Manitoba

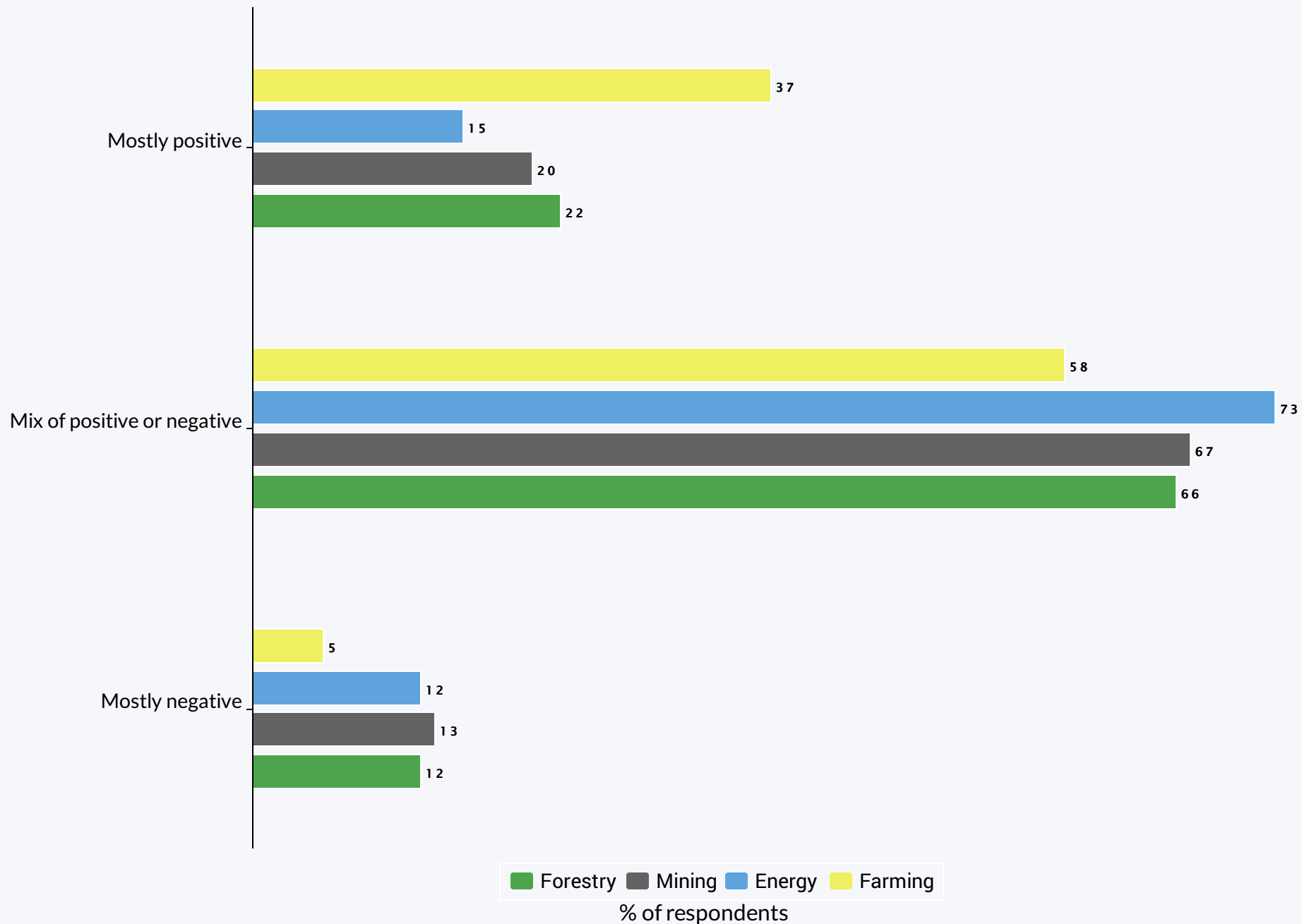


Manitobans are most familiar with farming



Like other provinces, farming had the highest trust in Manitoba. Trust for mining and forestry were the lowest in Manitoba compared to other provinces.

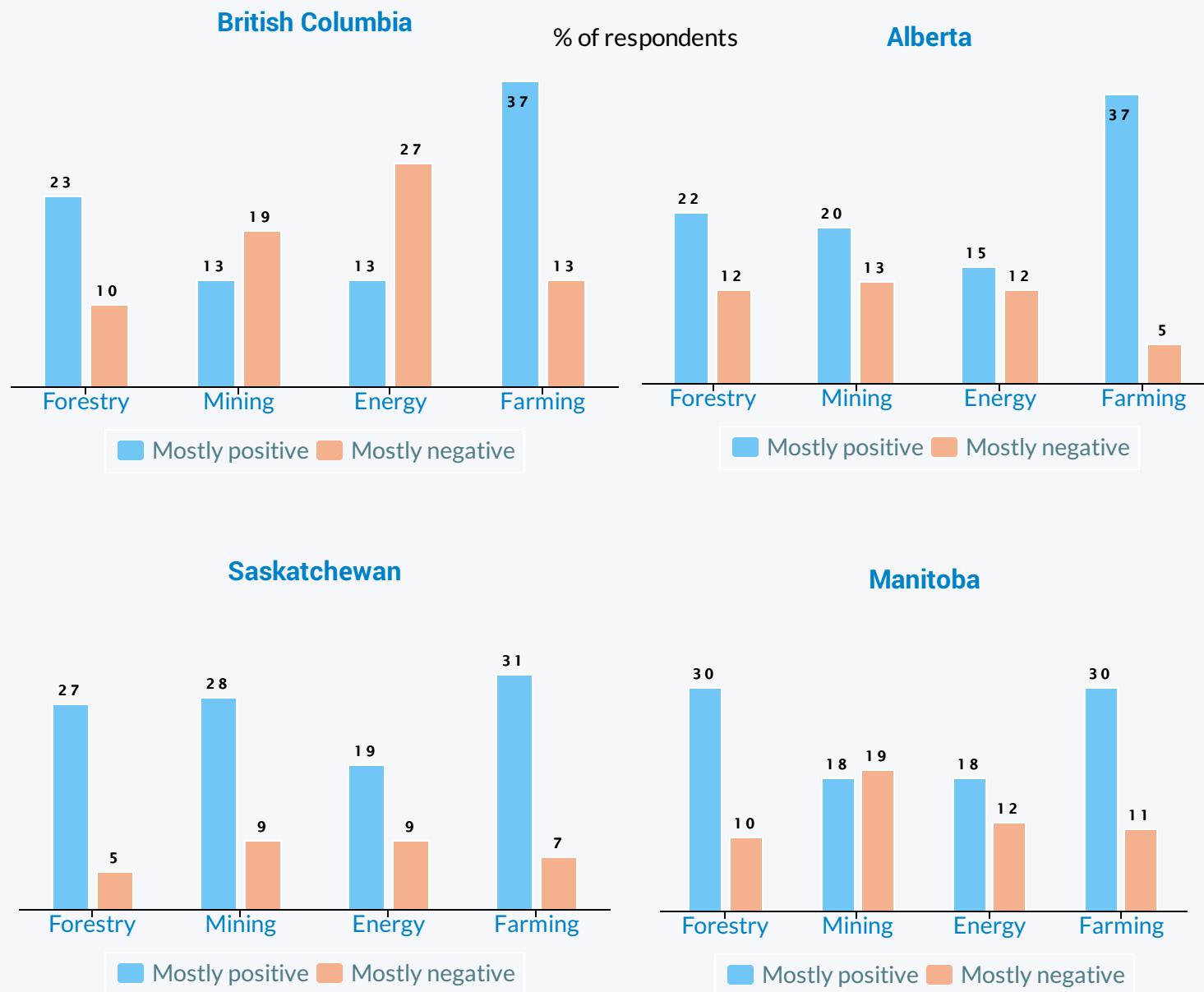
Type of media seen, read and heard about resource industries in Alberta



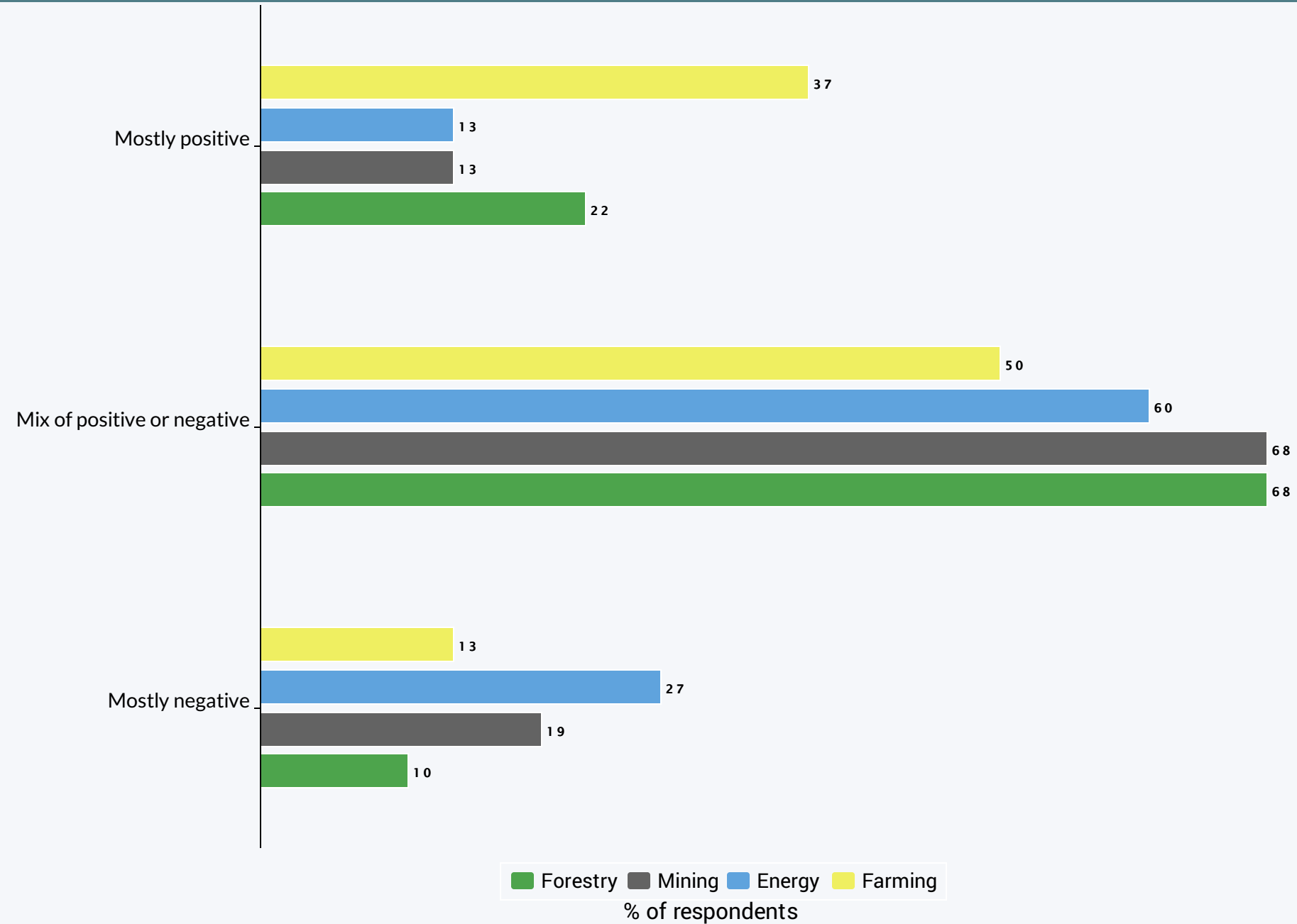
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Positive & negative media seen, read & heard about resource industries across provinces

- B.C. had the highest levels of mostly negative media perceived about mining and energy.
- Manitoba had the same level as B.C. of mostly negative media perceived about the mining industry.
- Saskatchewan had the highest levels of mostly positive media perceived about mining and energy.
- Forestry and farming had significantly more mostly positive than negative media perceived by respondents across the western provinces.

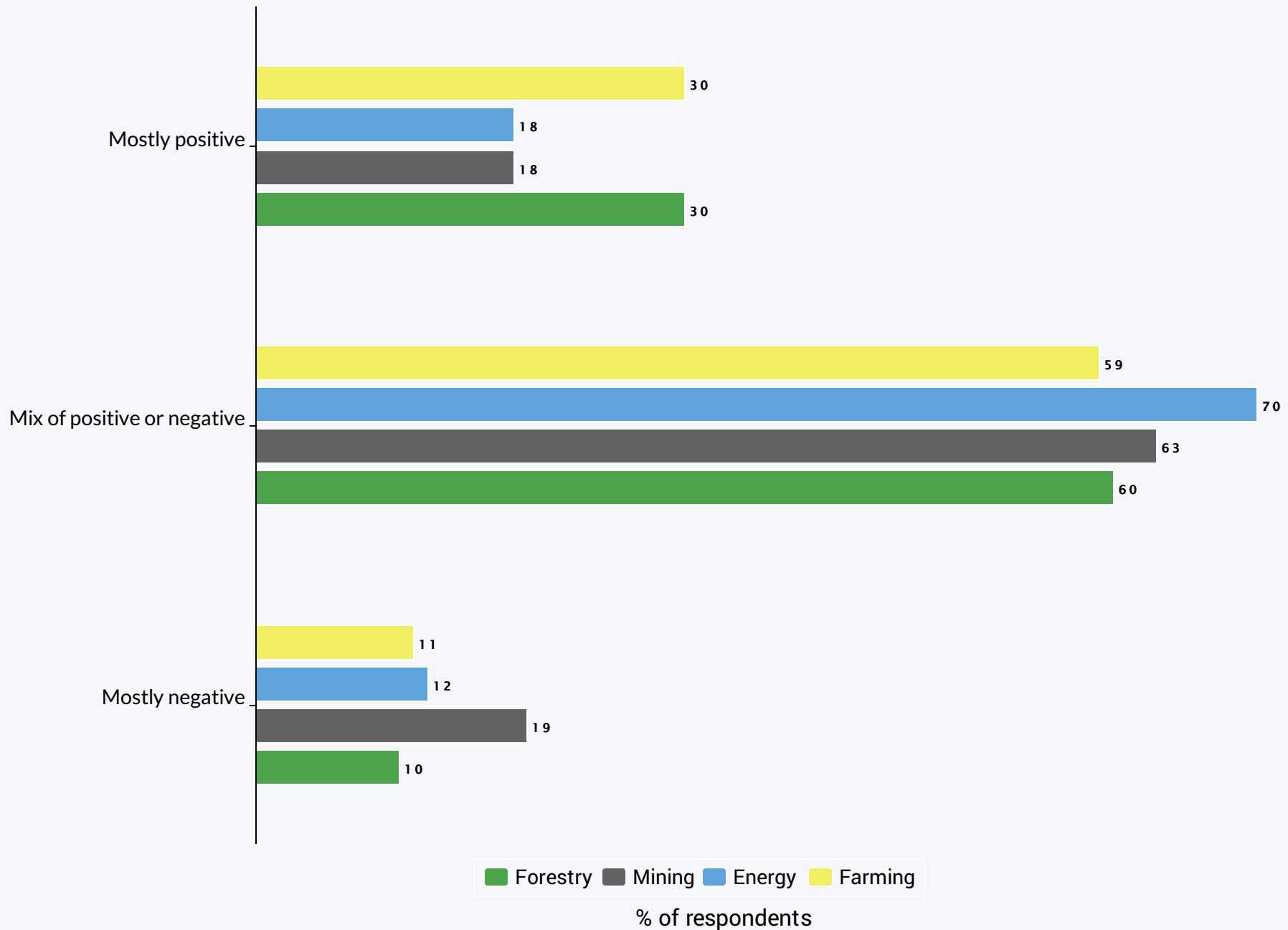


Type of media seen, read and heard about resource industries in British Columbia

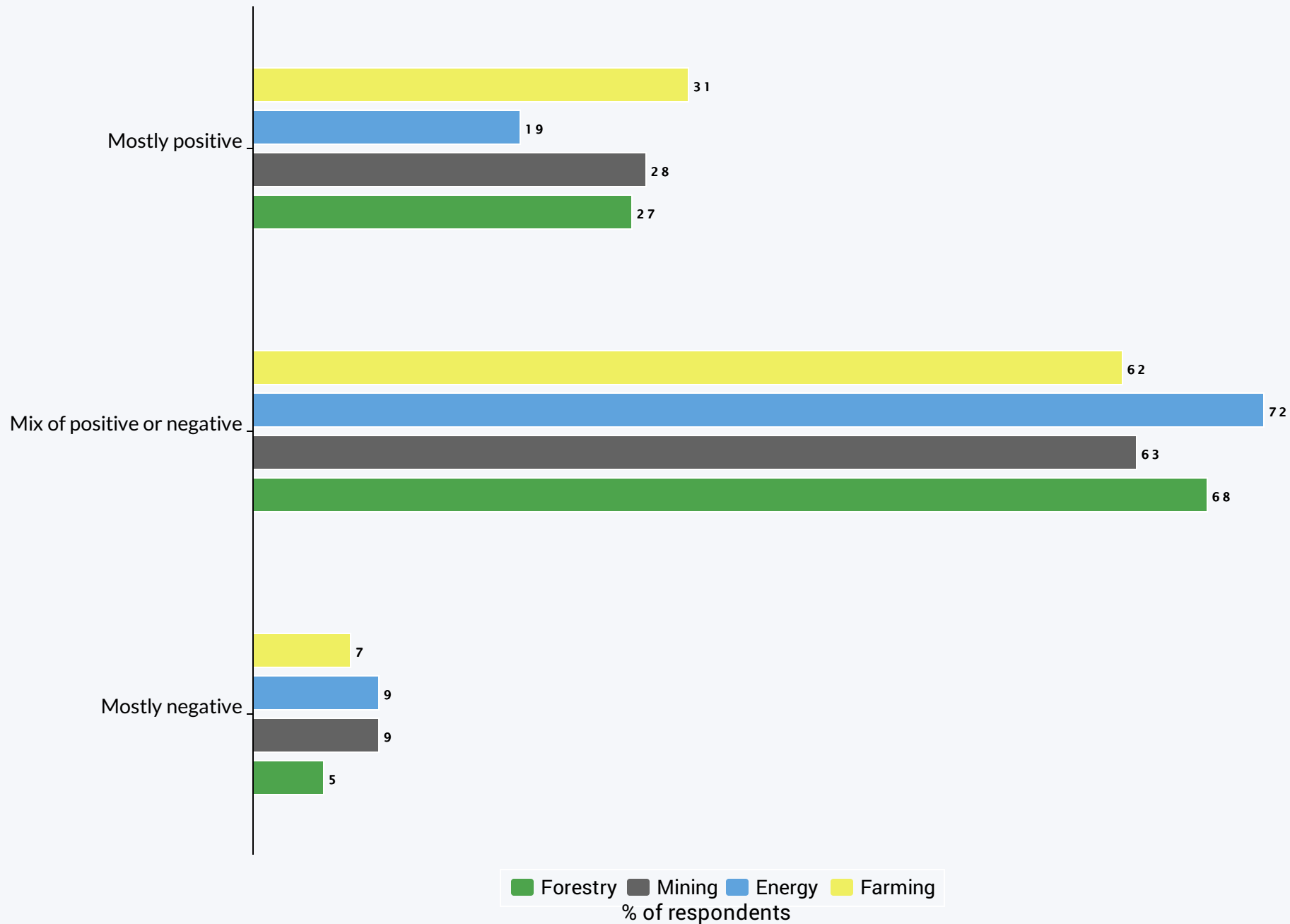


Ipsos Canada on behalf of the Canada West Foundation conducted a survey in April 2014 to understand western Canadian perceptions of resource industries. The study had 3,038 respondents across the western provinces, including Ontario and select findings are presented above. The full results of the survey are available at www.cwf.ca

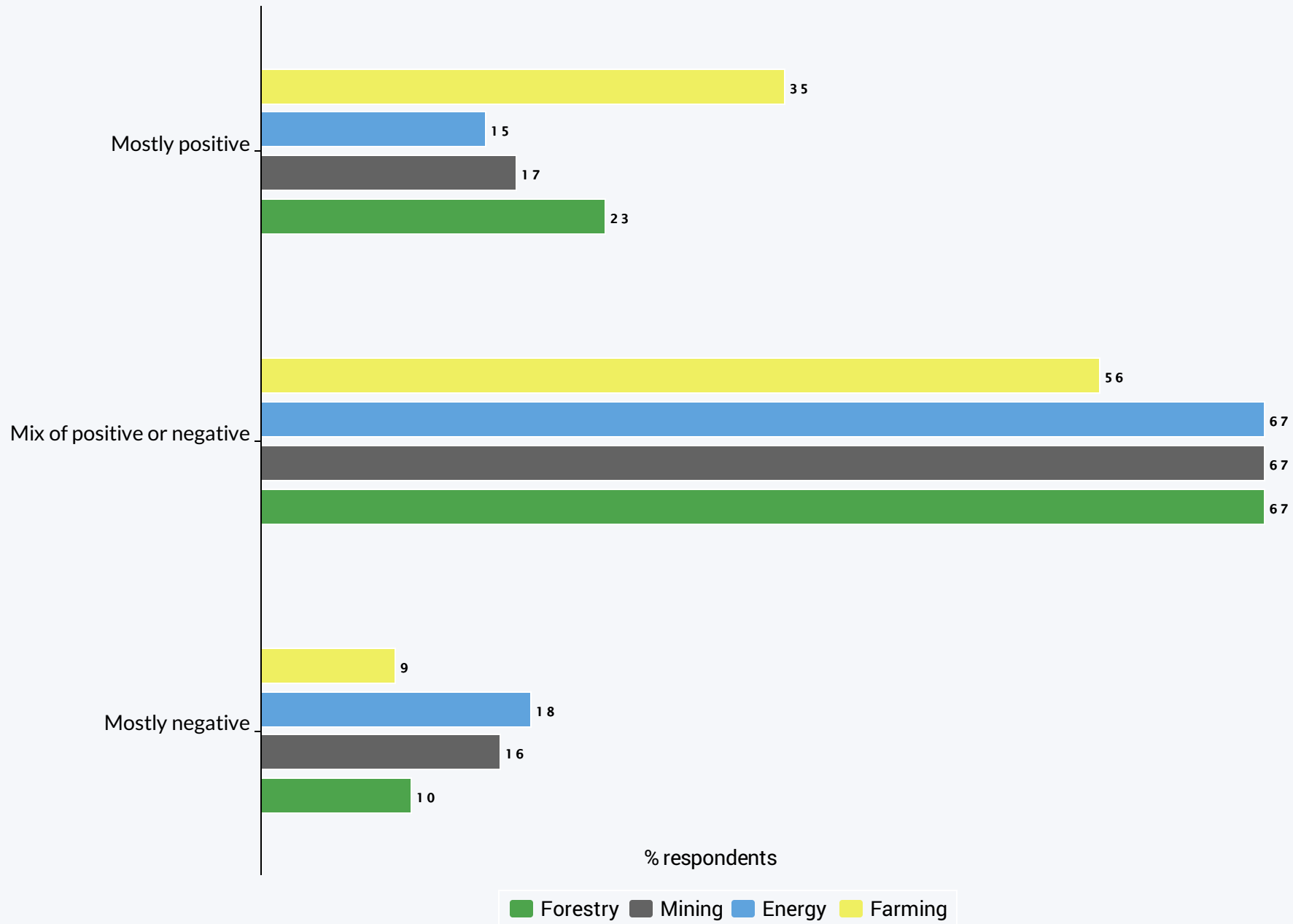
Type of media seen, read and heard about resource industries in Manitoba



Type of media seen, read and heard about resource industries in Saskatchewan



Media perceived as fairly balanced across the western provinces



Public perceptions of the mining industry

Public support for resource industries

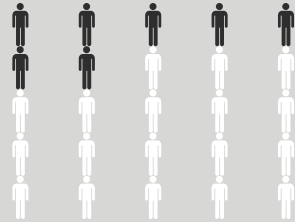


1 Not seen to be strong on environment



13% of western Canadians thought the mining sector was environmentally responsible and 31% believed the industry performs poorly on this metric.

2 Job creation



27% of respondents thought mining does well at creating jobs while 15% believed that mining does poorly.

3 Familiarity with the industry



27% of respondents felt they knew the mining industry well. 73% thought they knew nothing or very little about the industry.

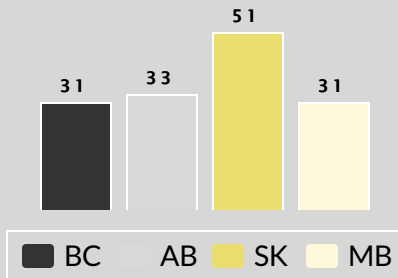
4 Keeping promises to communities



13% of respondents thought mining was doing a good job at keeping its commitments to communities. 25% thought mining performs poorly on this metric.

5 Trusted most in Saskatchewan

% of respondents who trust the industry



Except for Saskatchewan, trust levels did not vary too much across British Columbia, Alberta and Manitoba for the mining industry.

6 Consulting Aboriginal people



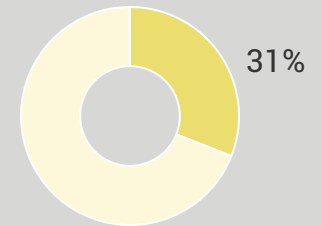
19% of western Canadians thought the mining industry does well at consulting Aboriginal people, while 27% thought farming does poorly.

7 Public health and safety



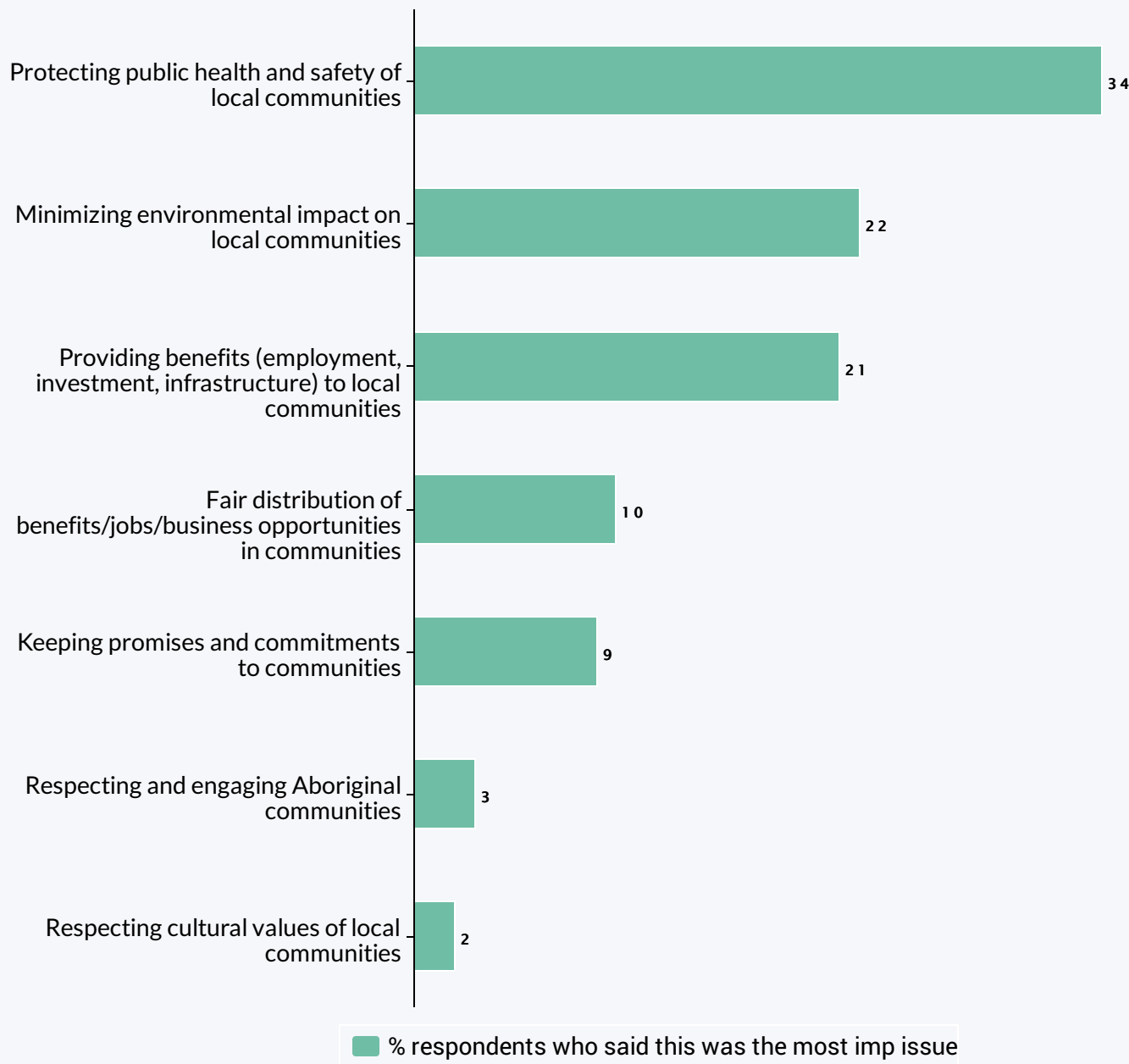
15% of western Canadians thought the mining industry performed well on protecting public health and safety, and 27% thought the industry performs poorly at this metric.

8 Contribution to the economy



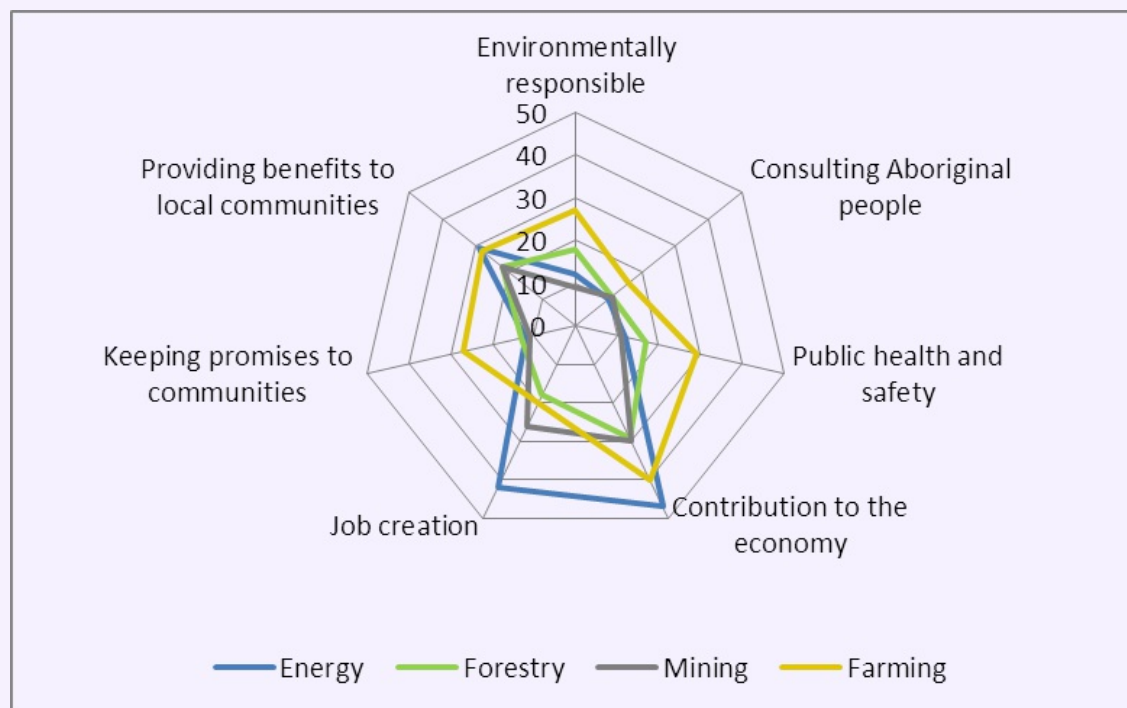
31% of respondents thought the mining industry was doing well at contributing to the economy, and 12% thought the industry does a poor job.

Protecting public health: most important issue related to resource industries in western Canada



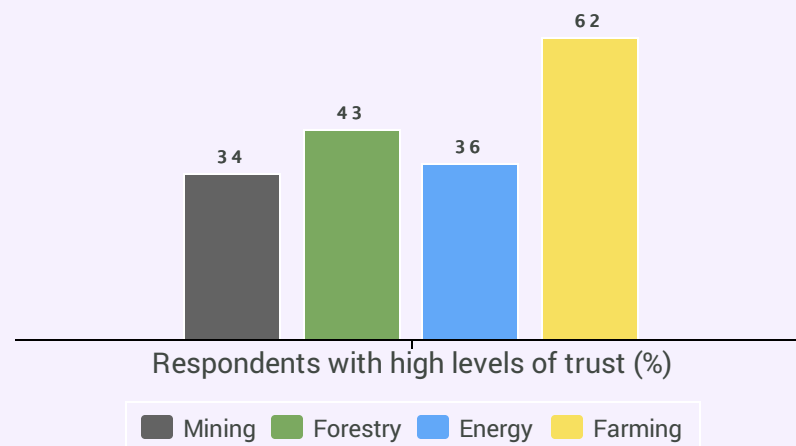
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Ontario respondents' perceived performance ratings for resource industries

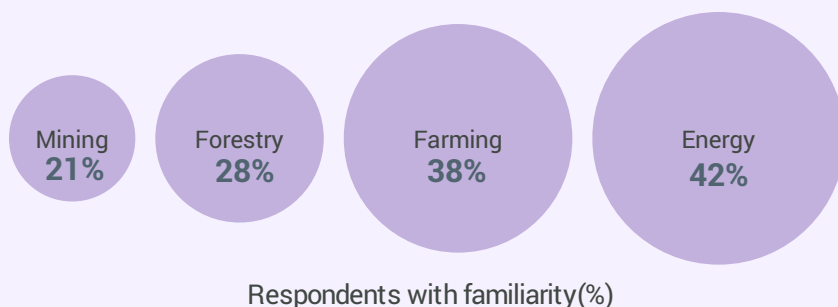


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

But they trust farming the most



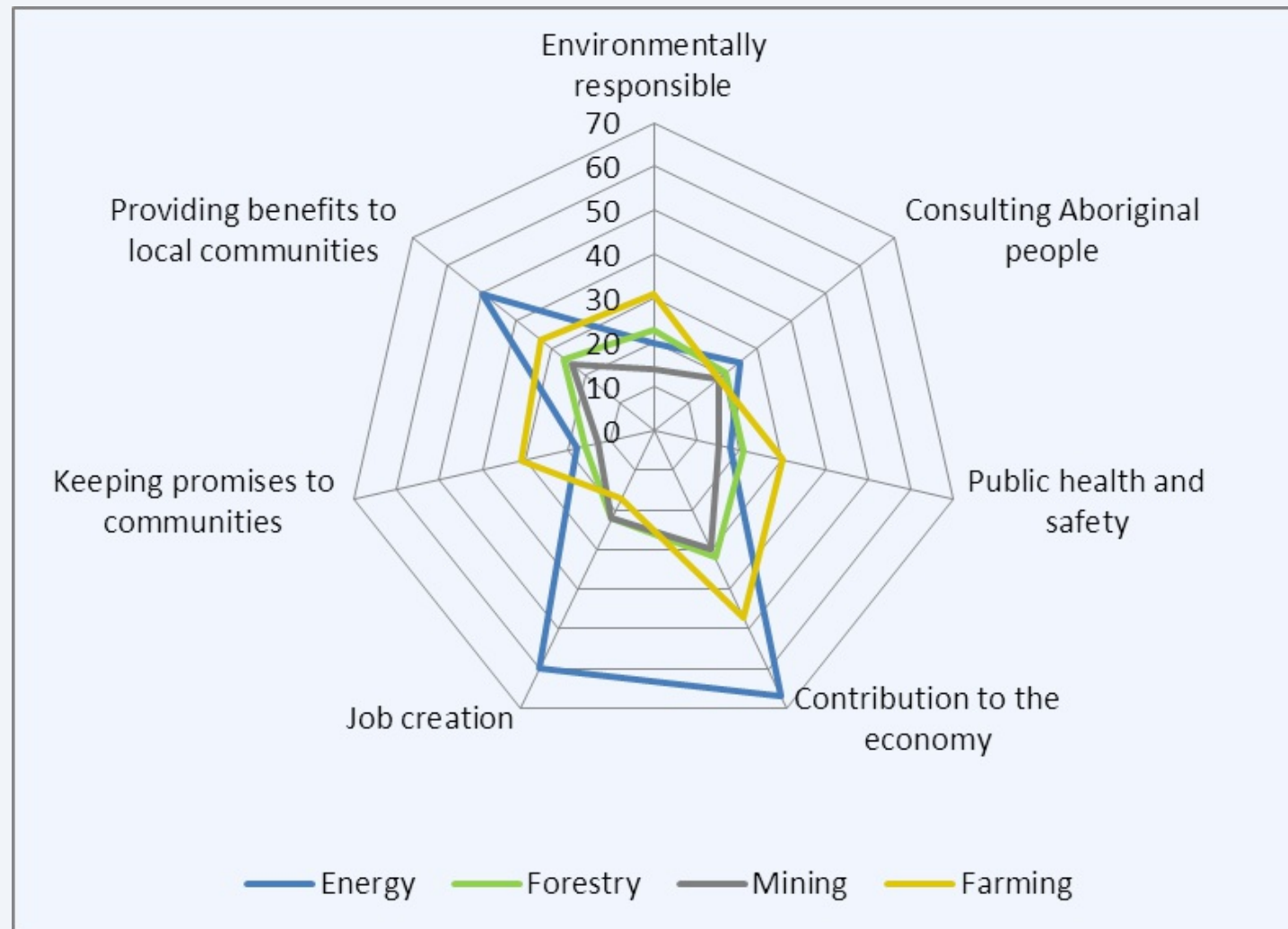
Ontario residents are most familiar with energy



Like other provinces, farming had the highest trust in Ontario. Ontario had higher trust in the energy and mining industry compared to Manitoba and B.C. residents.

Alberta: perceived performance ratings for resource industries

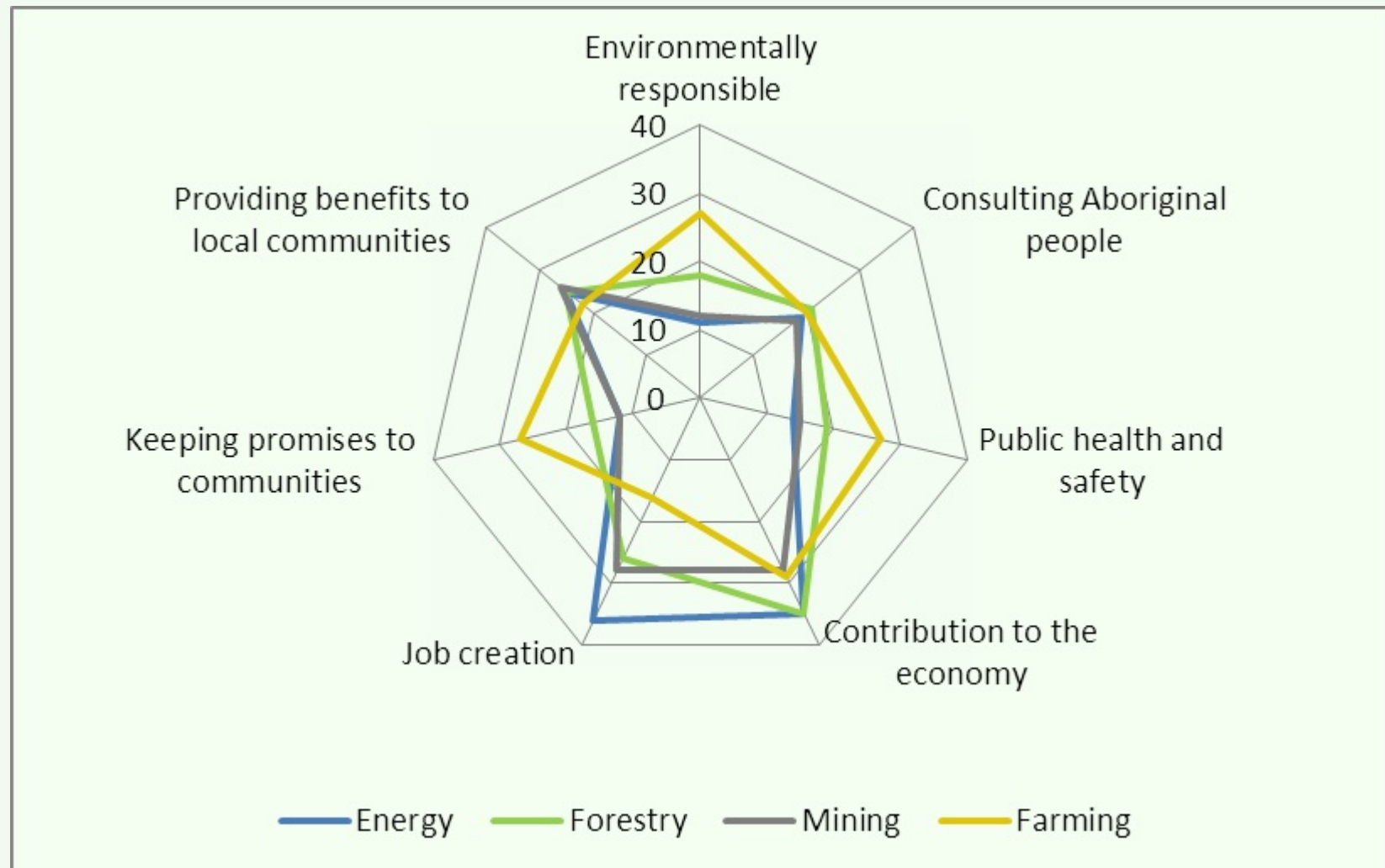
People in Alberta see energy contributing greatly to the economy, providing benefits to local communities and creating lots of jobs. Farming stood out in the perceived performance of protecting public health and safety, keeping promises to communities and environmental responsibility.



Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

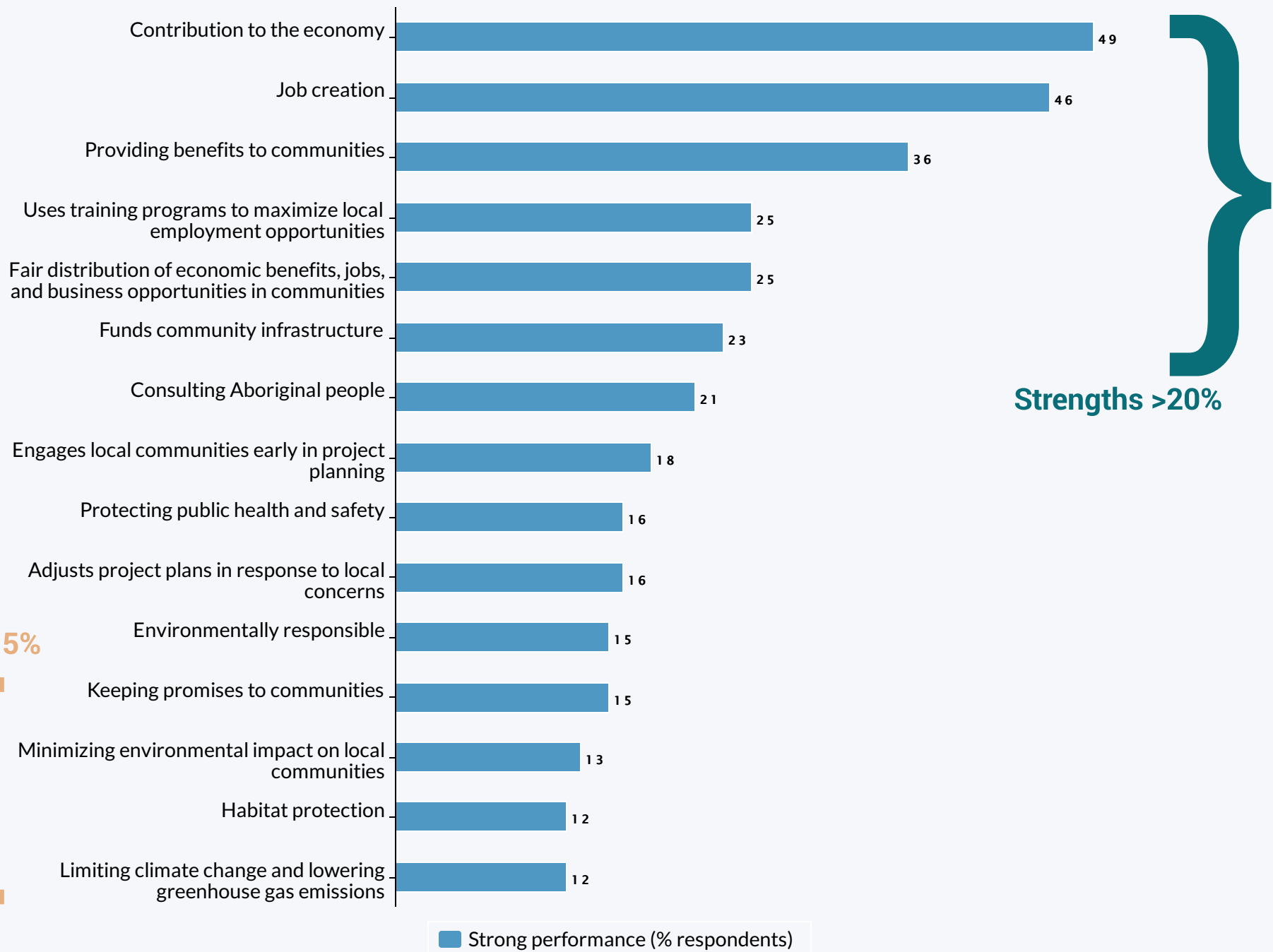
British Columbia: perceived performance ratings for resource industries

B.C. thought the farming industry had the best perceived performance on environment, public health and safety, and keeping promises to communities. The forestry industry, in general, had better perceived performance B.C. as compared to other provinces.

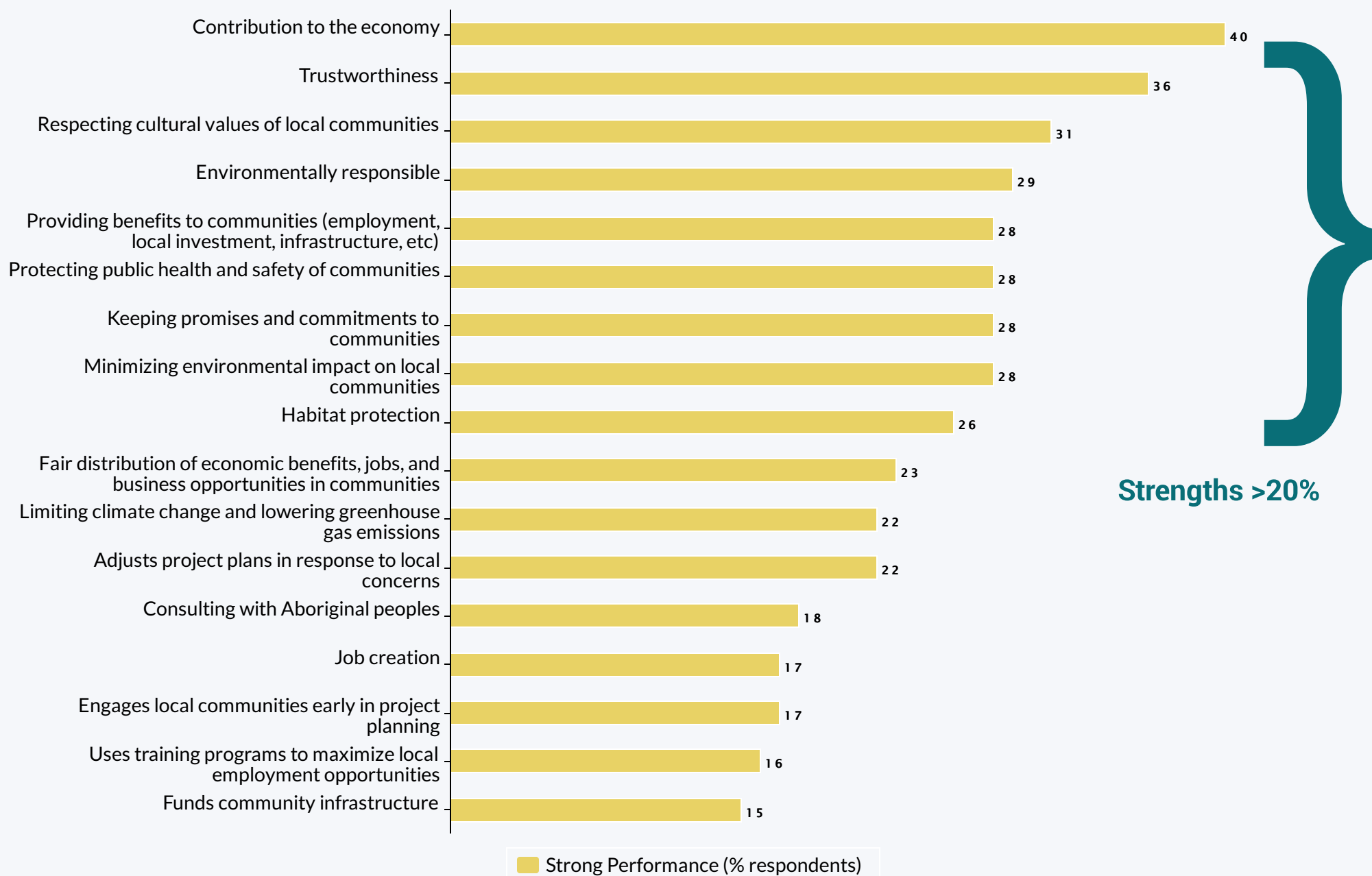


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

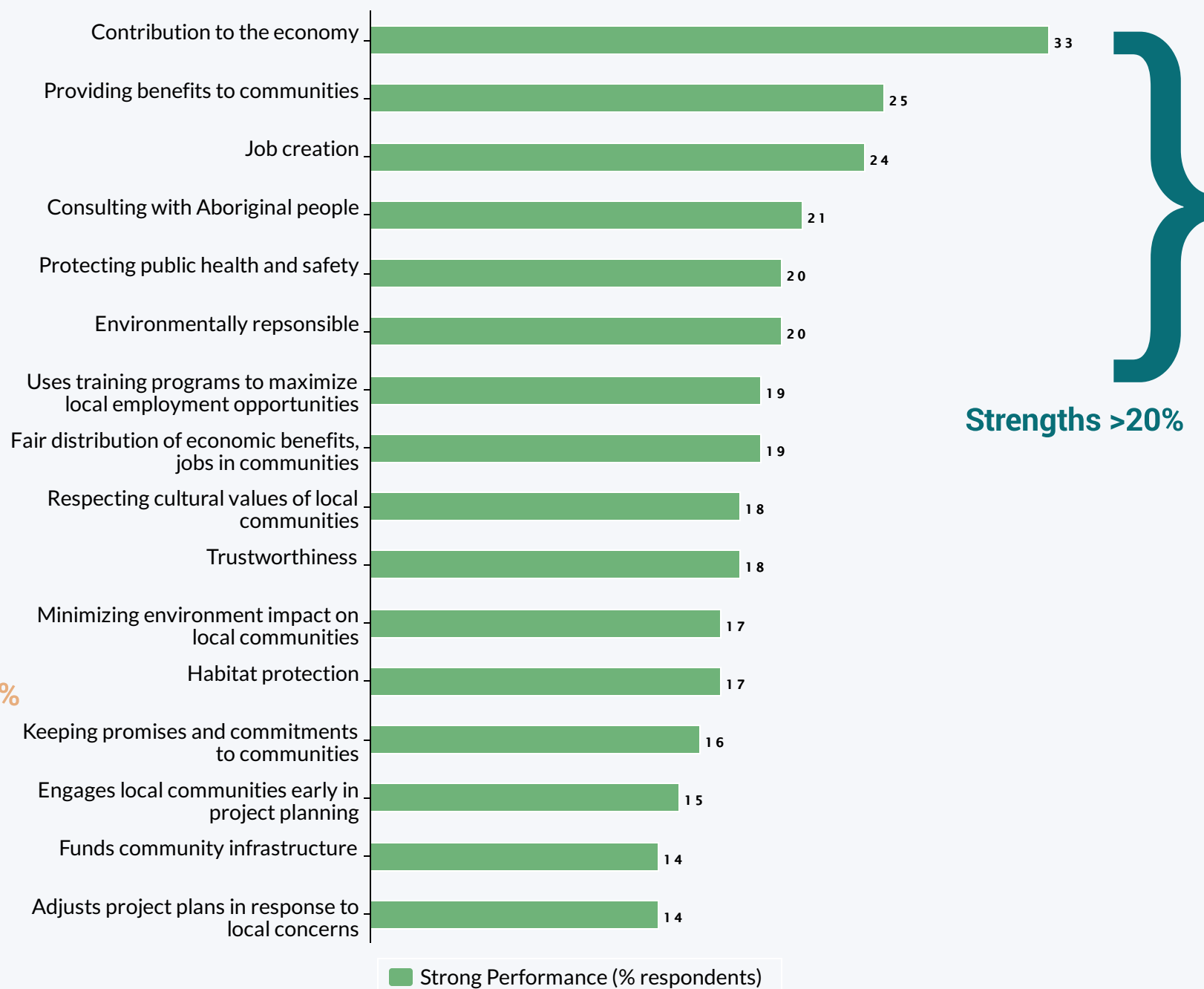
Perceived performance ratings for the energy industry



Perceived performance ratings for the farming industry



Perceived performance ratings for the forestry industry

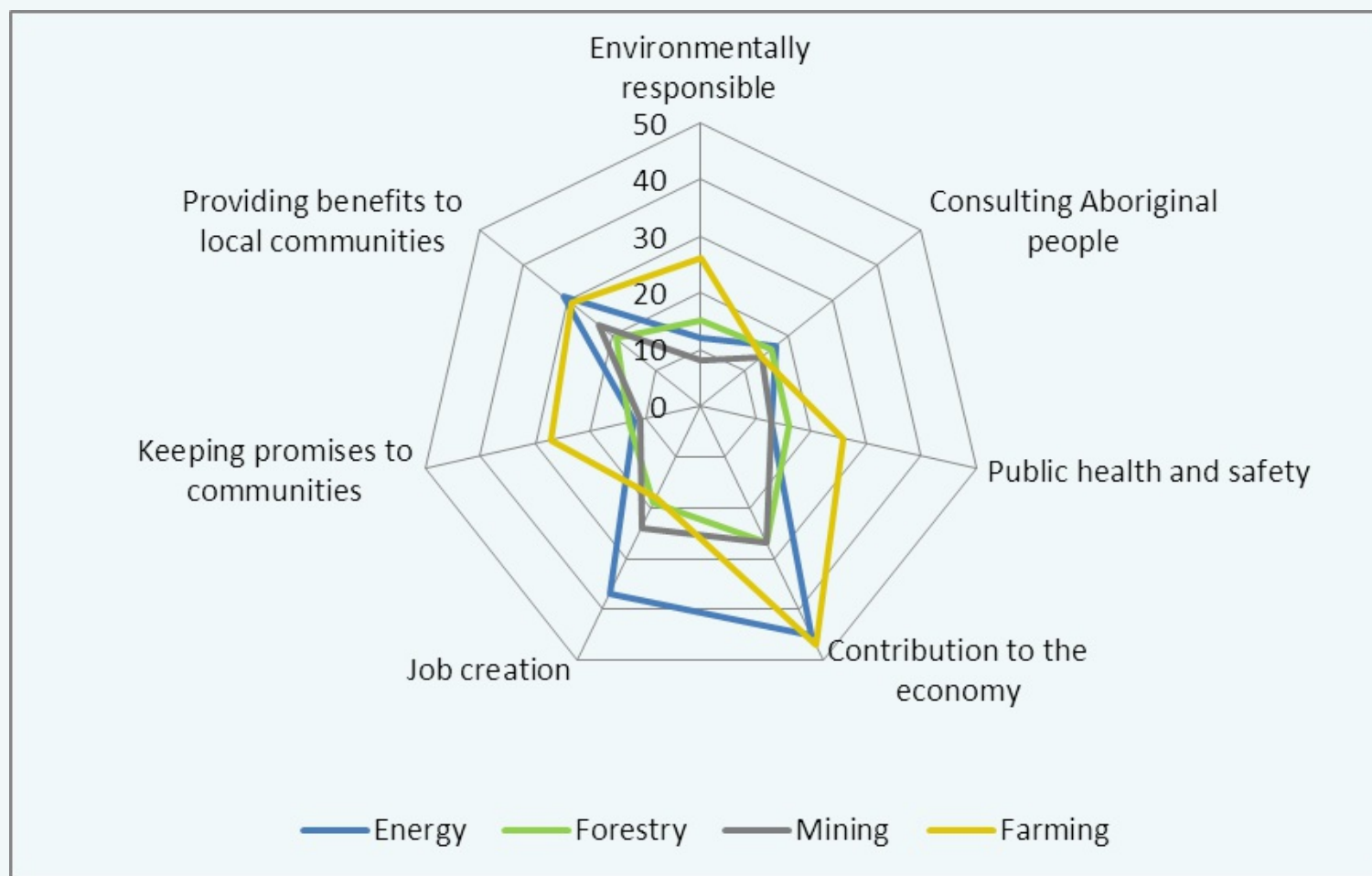


Weakness <15%

Strengths >20%

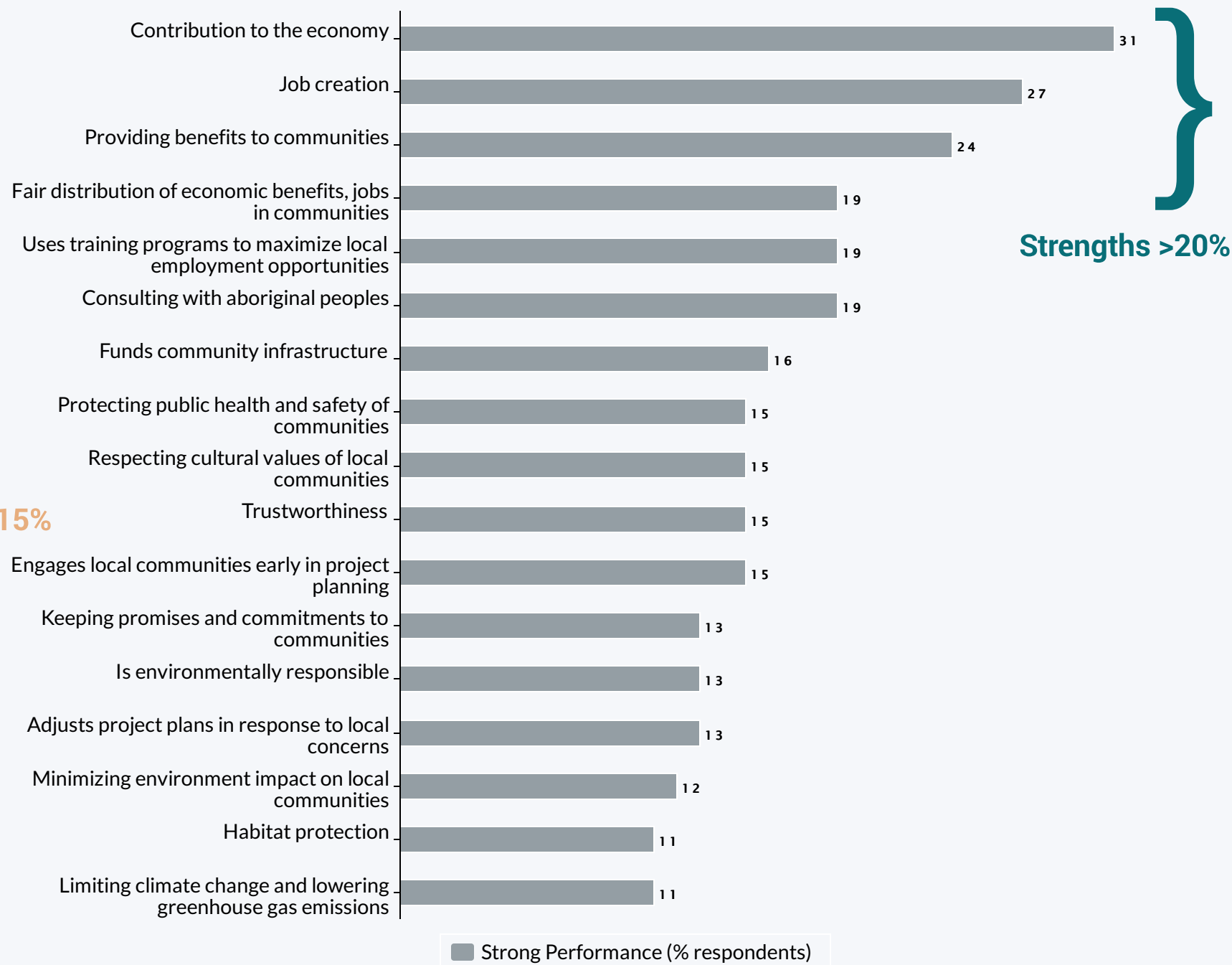
Manitoba: perceived performance ratings for resource industries

Consistent with other provinces, respondents in Manitoba thought farming stood out in its perceived performance on environment, public health and safety, economic contribution and keeping promises to local communities. Energy led the way in creating jobs and providing benefits to local communities.



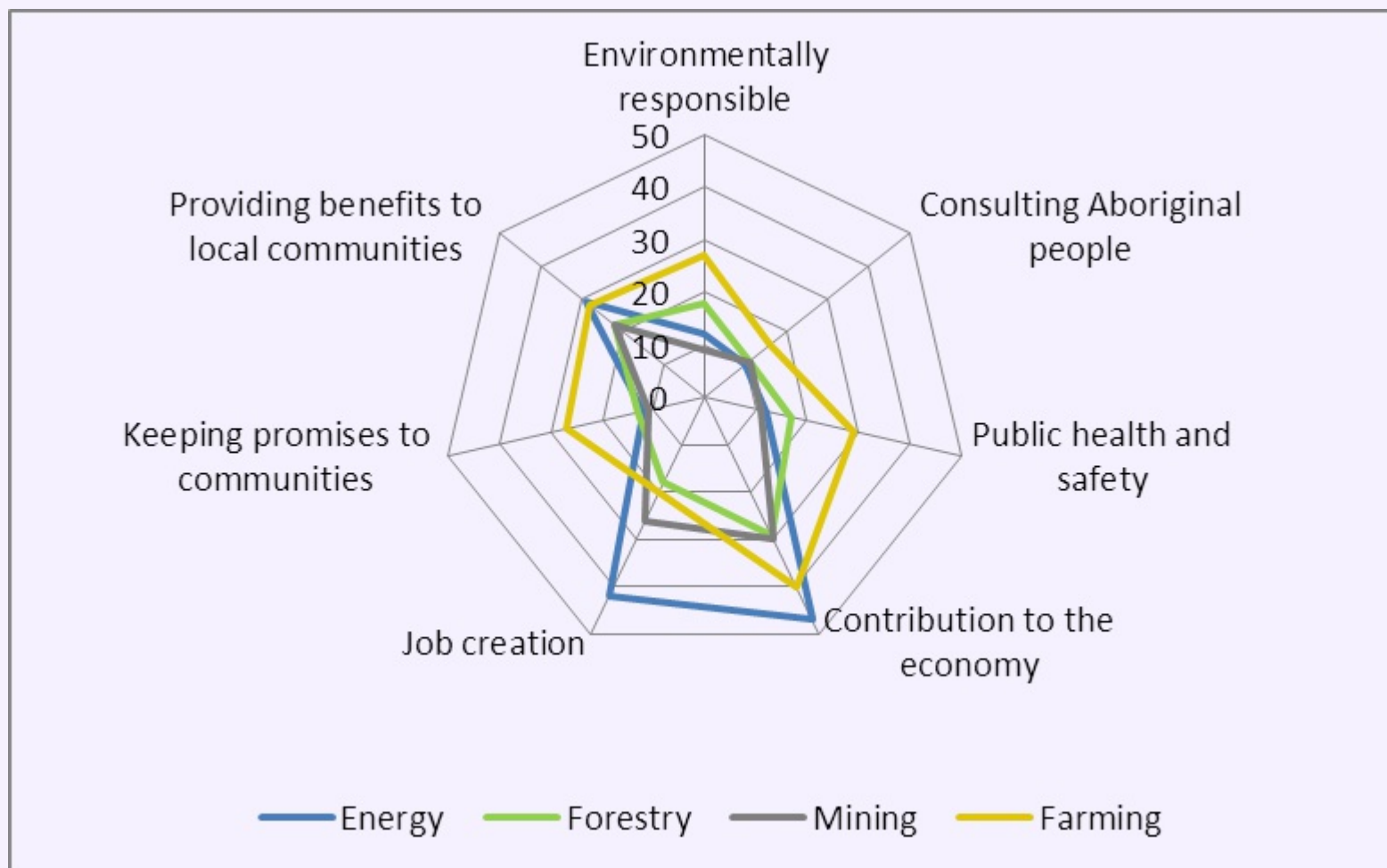
Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

Perceived performance ratings for the mining industry



Ontario: perceived performance ratings for resource industries

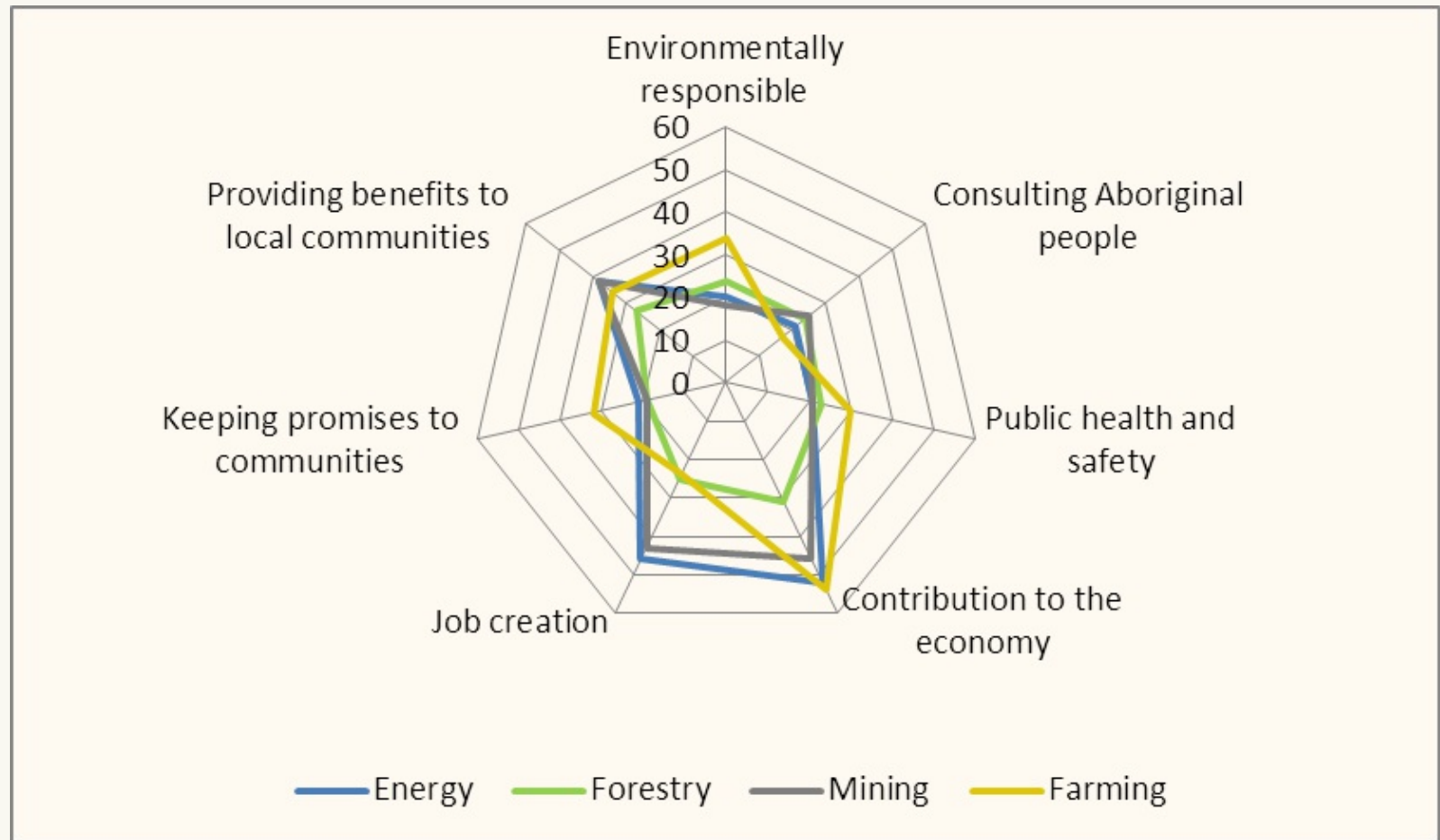
Consistent with other provinces, people in Ontario thought farming stood out in its perceived performance on environment, public health and safety, keeping promises to communities and consulting with Aboriginal people. Energy was perceived as performing well on creating jobs and economic contribution.



Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

Saskatchewan: perceived performance ratings for resource industries

Consistent with other provinces, people in Saskatchewan thought the farming stood out in the perceived performance on environment, public health and safety, economic contribution and keeping promises to communities. Energy and mining had the best perceived performance on providing benefits (such as jobs, infrastructure and investment) to local communities.

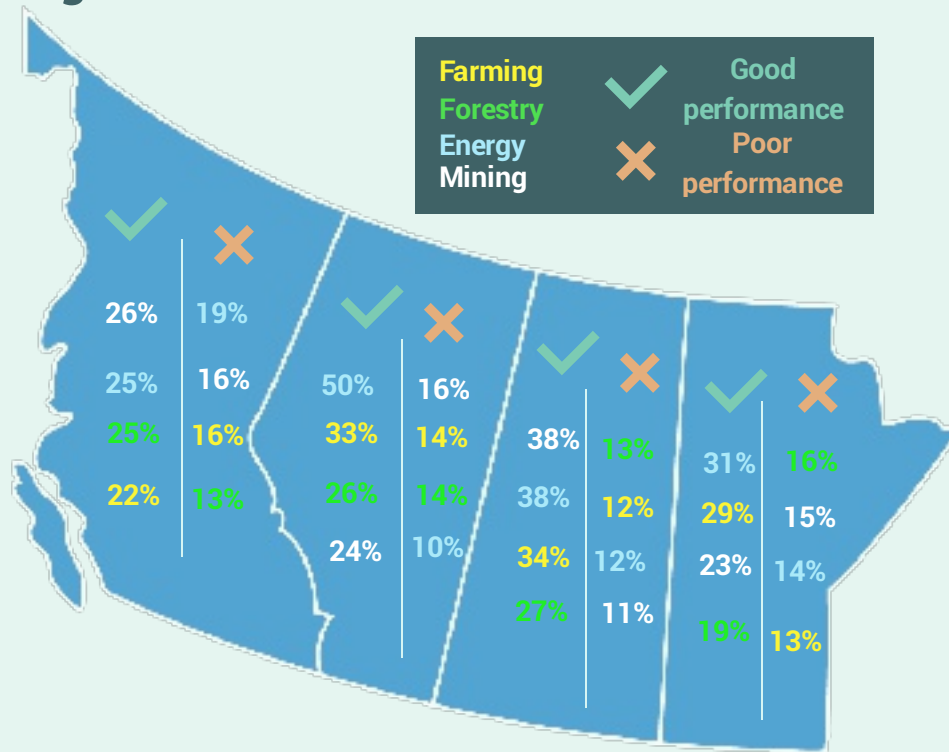


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

Providing benefits to local communities (employment, investment and infrastructure)



Energy industry perceived as having best performance
in providing benefits to local communities



3rd
out of seven

21% of respondents ranked this as
#3 most important issue related to
Canadian resource industries.

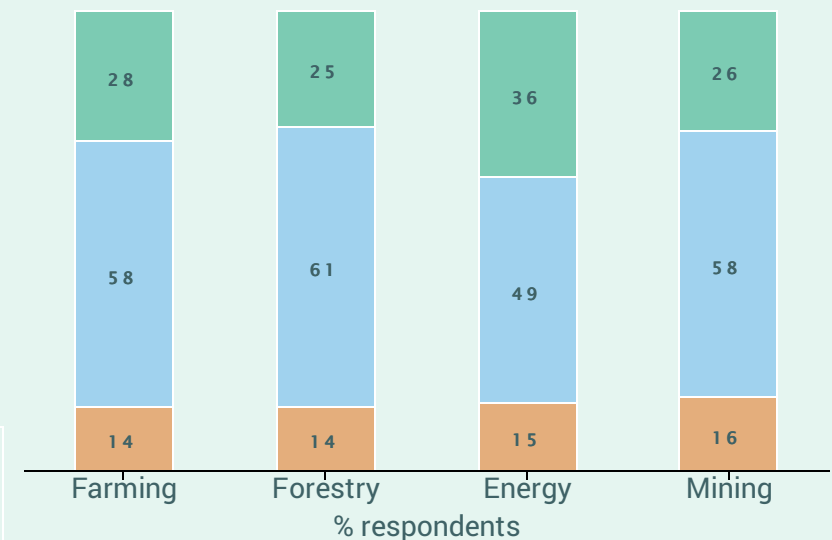
Not a top-ranked driver of trust

1
2
3

In order to improve levels of trust industry
there are other indicators whose performance
would have a better impact on trust.

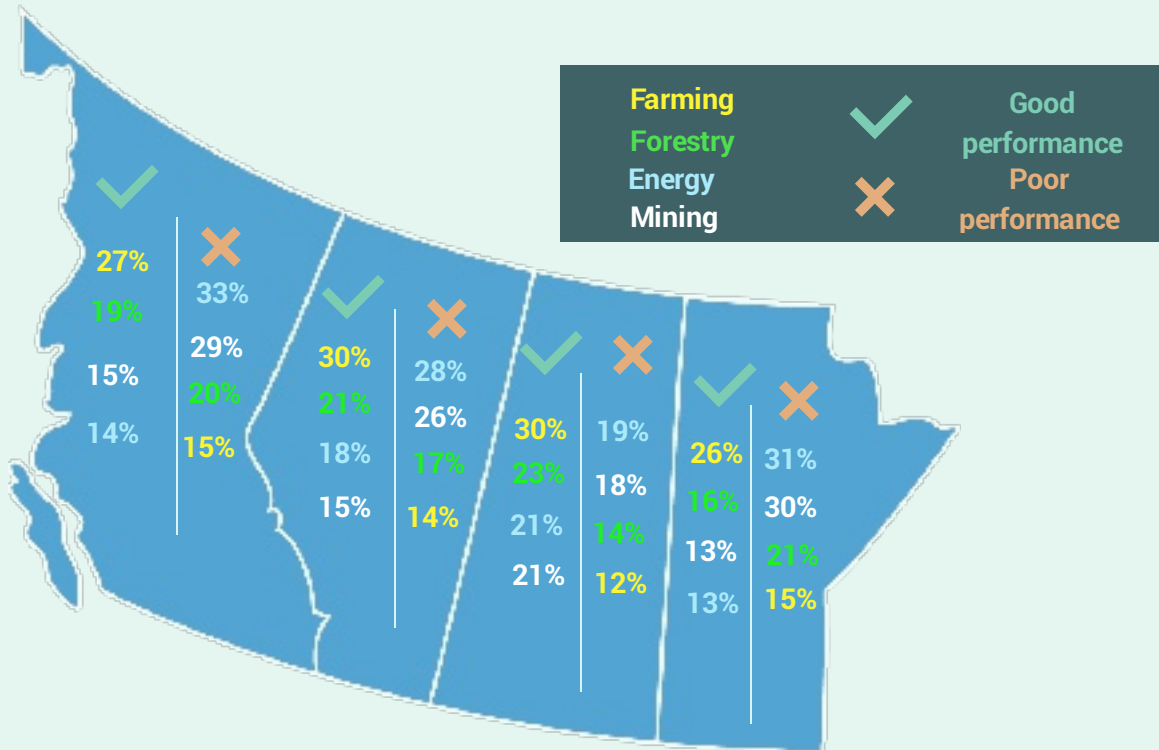


Performance ratings by industry



Most important issue for natural resources: protecting public health and safety

Farming best perceived performance protecting public health and safety



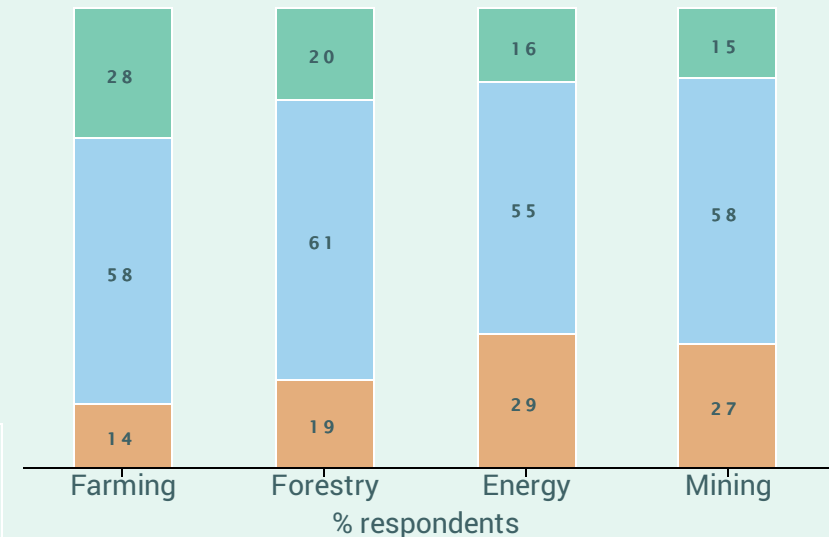
1st
out of seven

#1 issue related to resource industries: 34% of western Canadians said most important issue.

Protecting public health and safety drives trust

1 — 3rd highest driver of trust for energy, mining and farming.
2 — 4th for forestry.
3 —

Performance by industry



Reasons for trust and mistrust

Public support for resource industries in western Canada



Forestry

Top reasons to trust

- Environmentally friendly/sustainable practices
- Good reforestation practices
- Government regulated
- Good for the economy/creates jobs

Top reasons to mistrust

- Bad for the environment/non-sustainable practices
- Motivated solely by financial gains/not socially responsible
- Do not approve of clear cutting
- Deforestation

Energy

Top reasons to trust

- Good for the economy/creates jobs
- Government regulated
- Reputable/heard good things about it
- Environmentally friendly/sustainable practices
- Energy is a vital necessity

Top reasons to mistrust

- Motivated by financial gains/not socially responsible
- Bad for the environment/non-sustainable practices

Mining

Top reasons to trust

- Government regulated
- Good for the economy/creates jobs
- Environmentally friendly/sustainable practices

Top reasons to mistrust

- Bad for the environment/non-sustainable practices
- Motivated by financial gains/not socially responsible
- Unsafe/unhealthy practices

Farming

Top reasons to trust

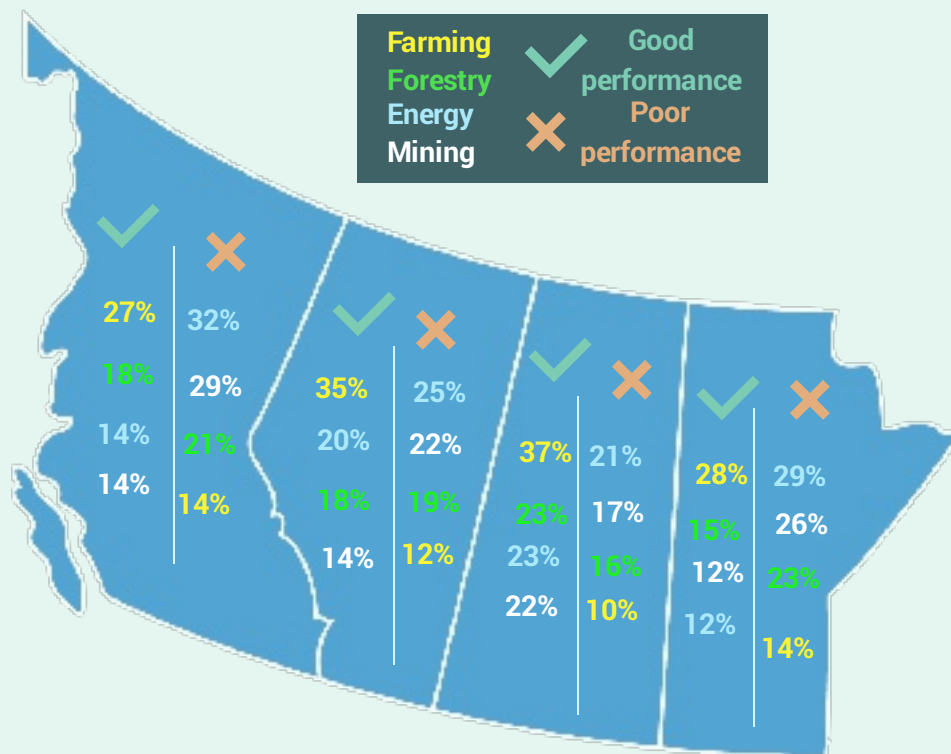
- Trustworthy/reliable, responsible
- Myself/friends/relatives come from a farming background
- Food is a vital necessity
- Small/local/family-run operations
- Environmentally friendly/sustainable practices

Top reasons to mistrust

- Poor animal welfare issues
- Use of additives/chemicals and pesticides
- Use of hormones/antibiotics and genetic engineering techniques
- Motivated by financial gains/not socially responsible

Respecting cultural values of local communities

Respondents gave farming best performance ratings, while energy received the lowest ratings



7th
out of seven

7th most important issue related to Canadian resource industries. Only 2% of respondents cited this as the most important issue.

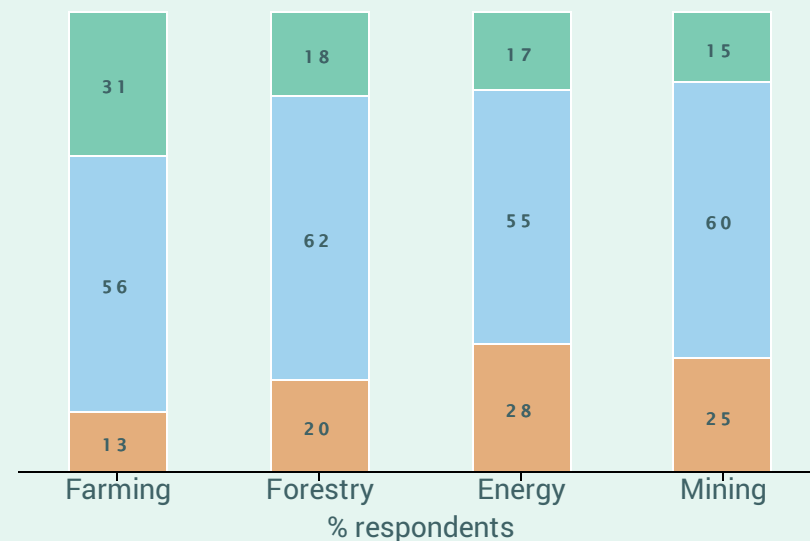
Varied rankings as a driver of trust

1
2
3

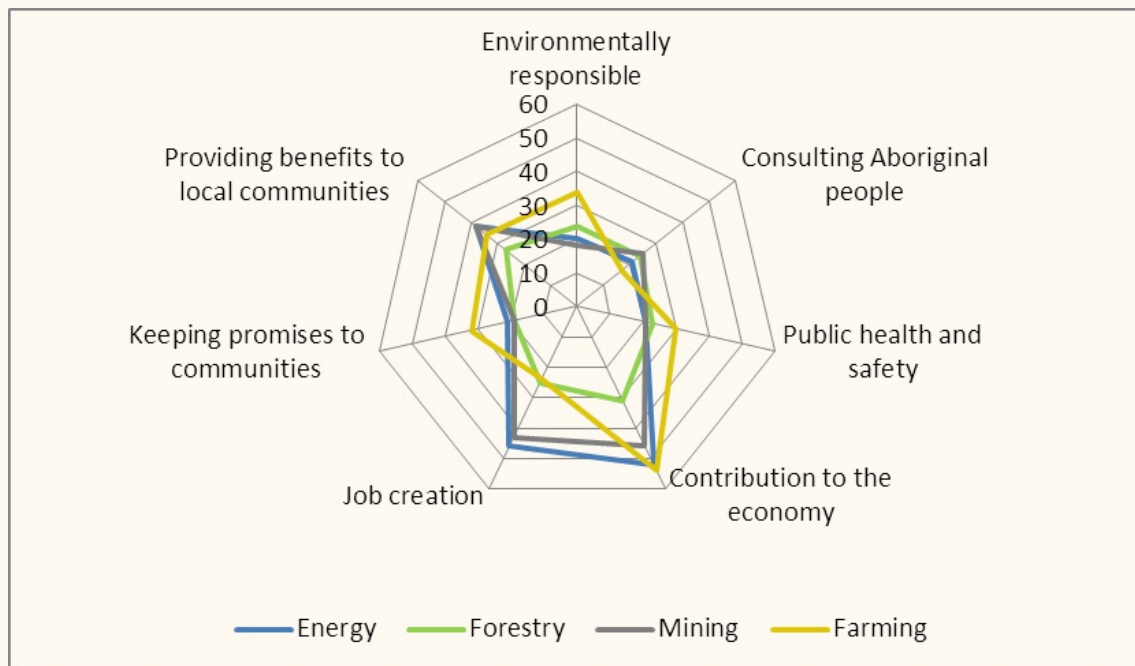
3rd most important for forestry,
5th for mining and farming, and
7th for the energy industry.

Good
Neutral
Poor

Performance ratings by industry

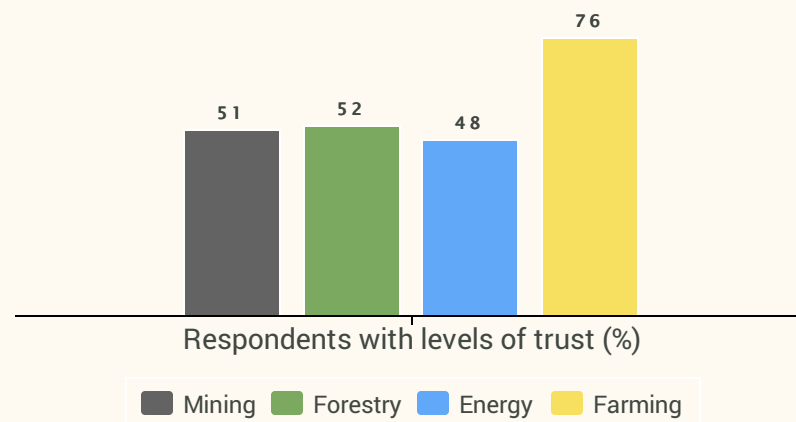


Saskatchewan respondents' performance ratings for resource industries

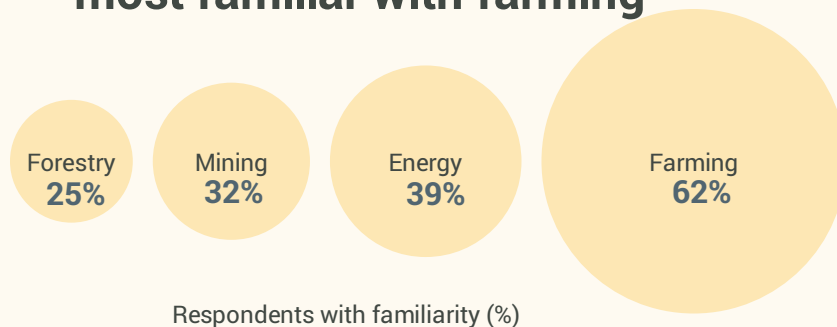


Each point on the coloured industry lines indicates the percentage of respondents who rated that industry as having good performance in a particular area.

Farming is the most trusted industry in Saskatchewan

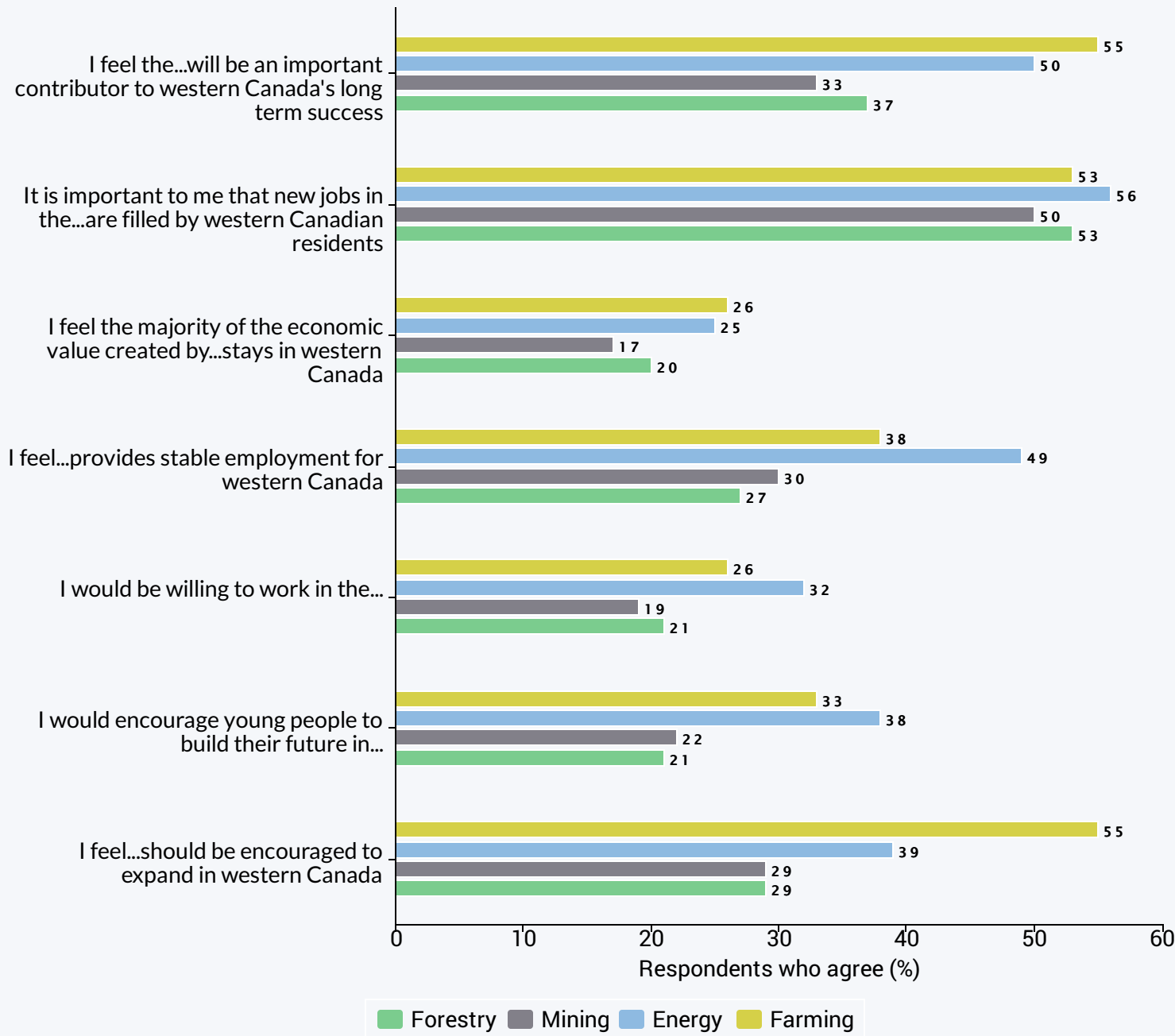


Saskatchewan residents are most familiar with farming



Like other provinces farming had the highest trust in Saskatchewan. Trust for mining, forestry and energy were the highest in Saskatchewan compared to other provinces.

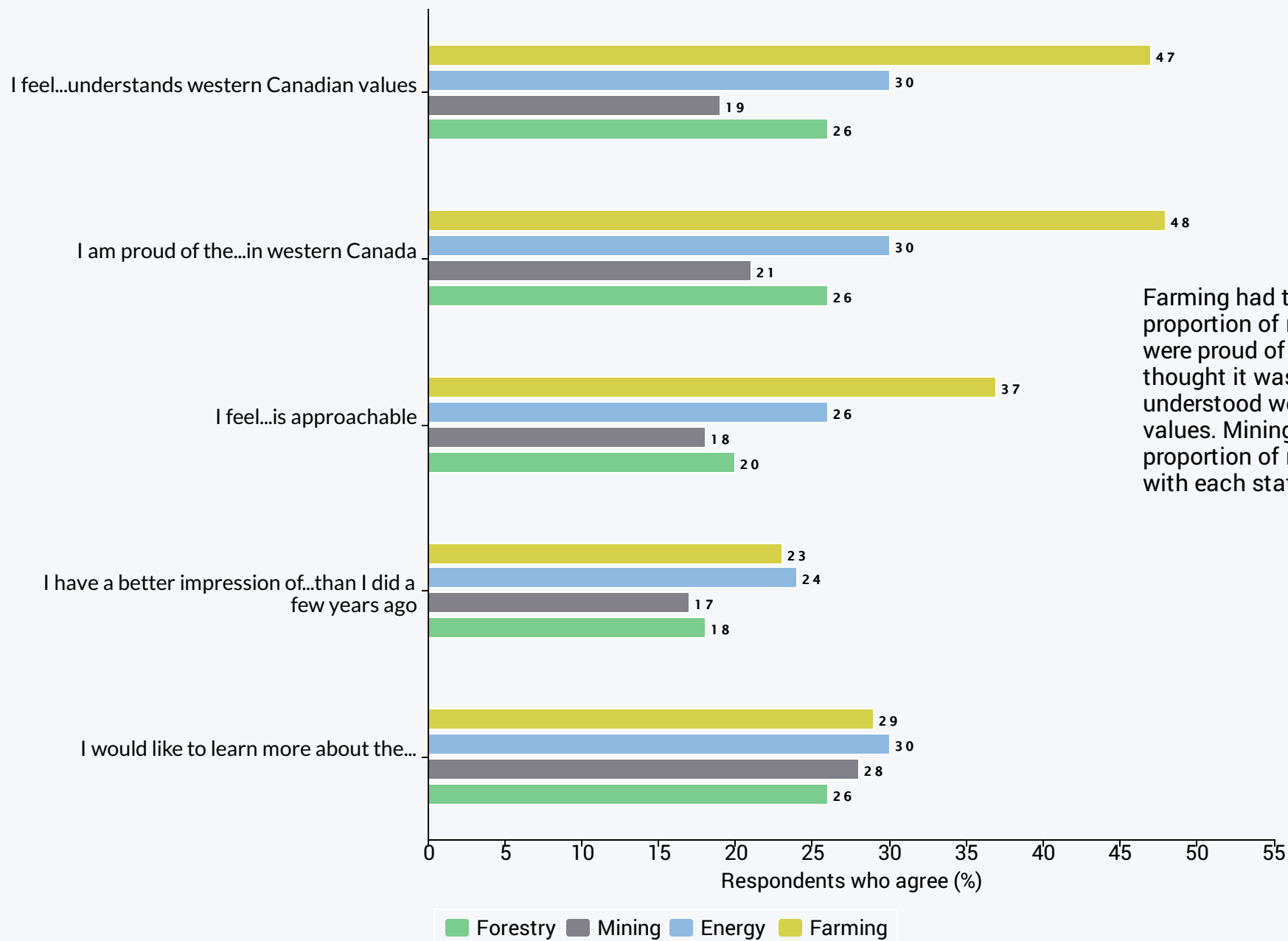
Statements assessing perceptions of economic benefits of resource industries in western Canada



Farming was seen to be the most important to western Canada's long term success.

Western Canadians thought energy created the most stable employment, and the highest proportion were willing to work in the sector. For all four resource industries, respondents wanted the jobs to be filled by western Canadian residents.

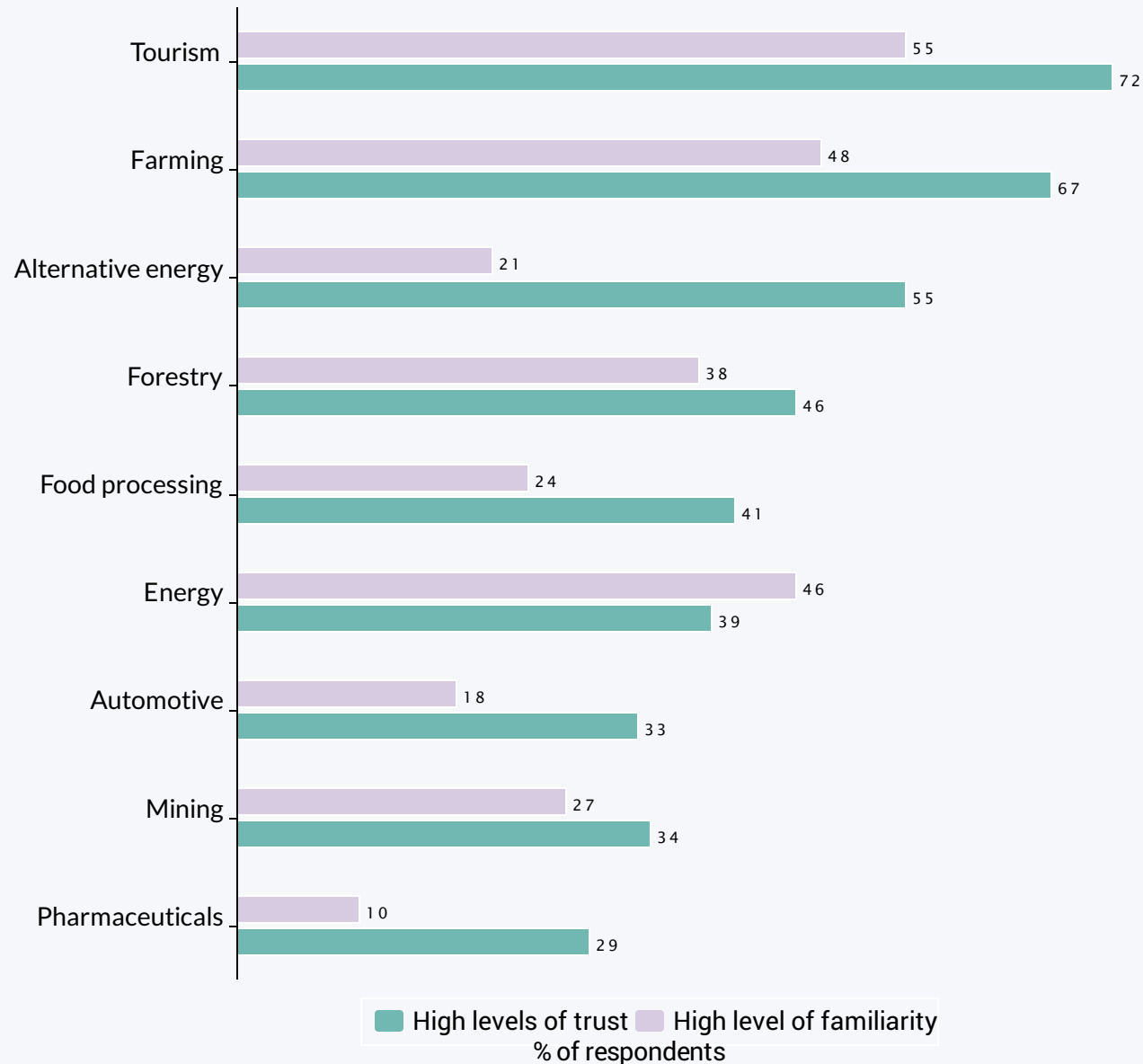
Statements assessing respondents' views about resource industries in western Canada



Farming had the highest proportion of respondents who were proud of the industry, thought it was approachable and understood western Canadian values. Mining had the lowest proportion of respondents agree with each statement.

Trust and familiarity for industries in western Canada

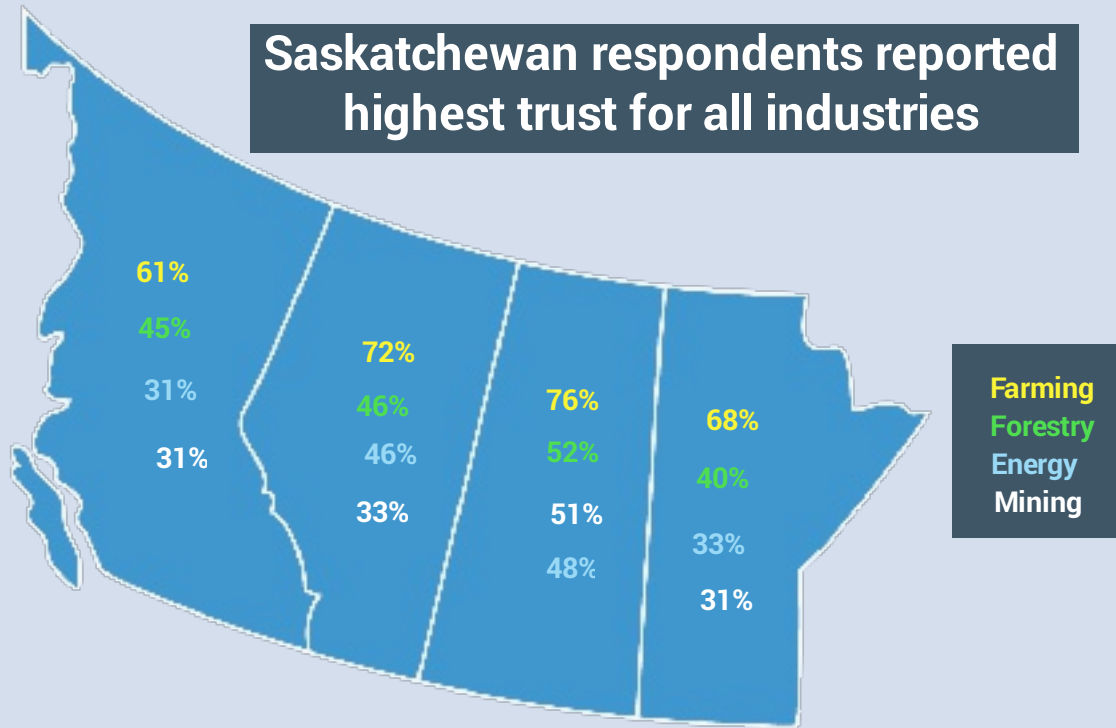
Tourism, farming and energy had the highest levels of familiarity. Yet energy had the lowest levels of trust. Food processing, forestry and alternative energy had significantly lower levels of familiarity than the energy industry but higher trust levels.



Trust among resource industries

Public support for resource industries

Saskatchewan respondents reported highest trust for all industries



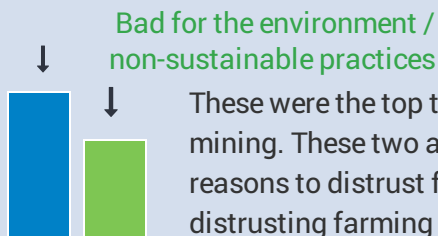
Top 5 Drivers of trust

1. Keeping promises to communities
2. Minimizing environmental impact
3. Protecting public health and safety
4. Environmentally responsible
5. Respecting cultural values of local

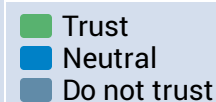


Top 2 reasons for mistrust

Motivated solely by financial gains / not socially responsible



These were the top two reasons to distrust energy and mining. These two as well as clear cutting were the top three reasons to distrust for forestry. The top two reasons for distrusting farming were animal welfare issues and the use of chemicals and pesticides.



Farming is the most trusted industry in western Canada

