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du Canada

Annual Public Opinion Research Measures 2020

Final Report

Prepared for Canada Energy Regulator

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Canada Energy Regulator – Annual Public Opinion Research Measures 2020

Final report

Prepared for Canada Energy Regulator by Environics Research

March 2020

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This public opinion research report presents the results of quantitative research conducted by Environics on behalf of Canada Energy Regulator. The research was conducted online and by telephone with the general population, from February 4 to 18, 2020.

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Executive summary

1. Background and objectives

The Canada Energy Regulator (CER) oversees oil and gas pipelines and electrical powerlines that cross a national, provincial or territorial border. The organization makes decisions in the public interest, about energy projects affecting Canadians.

The CER decided to conduct a survey of Canadians in early 2020 to serve as a baseline for future annual tracking of its performance against a standard set of indicators. The CER intends to track Canadians' views on whether it operates transparently, and if it shares information to create awareness of and confidence in its work and regulatory processes. The CER will use the feedback from this survey to inform improvements to its Communications Program, and to ensure the program is fully aligned with the Government of Canada's Communications Policy.

2. Methodology

EnviroNics Research surveyed 1,002 Canadian adults (aged 18 years and older) between February 4 and 18, 2020. The sample included 901 Canadians from the provinces, who are members of an online panel. To reach Canadians in the northern territories, EnviroNics completed 101 telephone interviews using industry-standard random-digit-dialling techniques. Both surveys used the same questionnaire, with the telephone version adapted slightly for verbal delivery.

The data were statistically weighted by age, gender and region, to ensure the sample is reflective of the population according to the most recently available Census information.

Target group	Proportion of population	Target (quota)	Actual Unweighted	Actual Weighted*
Total	100%	1,000	1,002	1,002
Atlantic	7%	100	100	66
Quebec	23%	200	200	232
Ontario	38%	200	200	384
MB/SK	7%	100	100	68
Alberta	11%	150	151	116
BC	14%	150	150	133
Territories	<1%	100	101	2

*Results are weighted by region, gender and age to 2016 Census data.

More information about the methodology for this survey is included in Appendix A.

3. Cost of research

The cost of this research was \$59,931.81 (HST included).

4. Key findings

The main takeaway from the research is that Canadians have a good level of confidence that the CER is doing its job, especially in ensuring companies comply with regulations, enhancing global competitiveness, ensuring public safety, and making decisions based on scientific evidence. Three-quarters think the term “expert” at least somewhat describes the CER.

The results also indicate the Canada Energy Regulator (CER) is not a top-of-mind name among Canadians when thinking about the trans-border pipeline and powerline regulation landscape – and that no one organization is. A strong majority of eight in ten cannot think of the name of the organization responsible for the CER’s mandate. Four in ten do recognize the name, Canada Energy Regulator, when prompted. The National Energy Board (NEB), its previous incarnation, is recognized by about half who have not heard of the CER, and six percent name it unprompted as the organization with the CER’s mandate.

A minority of three in ten who have heard of the CER indicate they are familiar with it, and similar proportions are familiar with each of its specific functions. However, there is a reasonable amount of interest in knowing more: About three-quarters are at least moderately interested in learning more about the CER itself, and about six in ten would have modest interest in learning about its functions.

The survey took place during a time when energy projects were in the news as the survey field period occurred during the Wet’suwet’en First Nation pipeline demonstrations. Six in ten report having heard or seen information recently about existing or intended pipeline or powerline projects, which they mostly have seen on television. They are most likely to believe the government was the source of this information, followed by environmental groups; two in ten believe what they heard came from the Canada Energy Regulator.

5. Political neutrality statement and contact information

I hereby certify as a 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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Introduction

1. Background

As Canada's federal energy regulator, the CER oversees oil and gas pipelines and electrical powerlines that cross a national, provincial or territorial border. The CER makes decisions in the public interest about energy projects that impact Canadians.

The CER's roles and responsibilities include:

- Reviewing applications for new energy projects and upgrades to current projects;
- Providing oversight of oil and gas exploration and activities on frontier lands and offshore not otherwise regulated under territorial law or joint federal/provincial accord;
- Deciding what can be transported in pipelines and how much companies can charge for their services;
- Approving the export and import of natural gas and the export of oil; and,
- Providing Canadians with a neutral source of energy statistics, analysis and information.

2. Research rationale and objectives

The Canada Energy Regulator commissioned a survey of Canadians in early 2020 to serve as a baseline for future annual tracking of its performance against a standard set of indicators. The CER intends to track Canadians' views on whether it operates transparently, and if it shares information to create awareness of and confidence in its work and regulatory processes. The CER will use the feedback from this survey to inform improvements to its Communications Program and to ensure the program is fully aligned with the Government of Canada's Communications Policy.

3. Report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the results. A detailed description of the methodology used to conduct this research is presented in Appendix A. The research instrument is presented in Appendix B.

All results were analysed by the total responding and by key subgroups of the population (that is, by region, age, gender, household income and education, and other factors such as previous awareness of and self-described familiarity with the CER). Noteworthy subgroup differences are highlighted where relevant.

Note: Throughout this report columns and rows in tables may not add to 100% due to rounding or multiple mentions. Any base sample sizes not indicated are total sample.

Detailed findings

I. Awareness of and familiarity with the CER

1. Unaided awareness of the CER

Eight in ten cannot name an organization responsible for the CER's mandate

Canadians were asked if they know the name of the Canadian organization responsible for the CER's mandate of overseeing oil and gas pipelines and electrical powerlines that cross a national, provincial, or territorial border. Eight in ten are not able to name any organization. One percent name the CER unaided, while six percent indicate the National Energy Board/NEB. There is a range of other mentions, each cited by only small proportions.

Organization responsible for the CER's mandate – by region

Named organization	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
NET: Canada Energy Regulator	1%	1%	-	1%	2%	1%	2%	1%
Canada Energy Regulator	1%	1%	-	1%	2%	1%	1%	-
Canadian Energy Regulator	<1%	-	-	-	1%	-	1%	1%
National Energy Board/NEB	6%	9%	13%	8%	6%	-	8%	2%
Private company (Other)	2%	2%	4%	4%	2%	1%	3%	1%
Trans Mountain Pipeline	2%	4%	1%	-	1%	3%	-	-
Hydro (general)	2%	1%	-	2%	-	6%	1%	-
Other pipeline company	1%	3%	1%	1%	1%	<1%	1%	1%
Enbridge	1%	1%	-	-	2%	-	1%	-
Federal government department (various)	1%	-	-	-	1%	2%	1%	3%
Commission (Various)	1%	1%	-	-	1%	1%	-	-
TransCanada/TCPL/ TC Energy	1%	1%	-	1%	1%	<1%	-	-
Ministry of Energy	1%	-	1%	-	1%	-	-	-
Association (various)	1%	1%	-	1%	-	2%	-	-
Other mentions	1%	6%	4%	1%	3%	2%	1%	2%
DK/NA	79%	73%	75%	81%	80%	82%	82%	89%

Q1 Do you know the name of the Canadian organization responsible for overseeing oil and gas pipelines and electrical powerlines that cross a national, provincial, or territorial border?

As demonstrated in the table above, unaided awareness of the CER as the organization responsible for overseeing oil and gas pipelines and electrical powerlines crossing borders is uniform across the country. The NEB is the most cited organization across subgroups, with mentions being somewhat higher among university graduates (10%), Anglophones (8%), and those who, later in the survey, claim to be at least somewhat familiar with the CER (12%).

2. Aided awareness of the CER

Four in ten have heard of the CER when prompted, for a total awareness of 41 percent

When Canadians who did not name the CER unprompted are told the organization responsible for overseeing cross-border pipelines and powerlines is the Canada Energy Regulator, four in ten report having heard of this prior to the survey; six in ten have not. Aided awareness ranges from a low of 33 percent in B.C. to a high of 51 percent of Albertans. Total unaided and aided awareness is shown in the following table, as a percentage of the total population.

Total awareness of CER – by region

Total awareness of CER	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
Net: aware	41%	33%	51%	36%	40%	44%	37%	51%
Unaided awareness	1%	1%	-	1%	2%	1%	2%	1%
Aided awareness	40%	32%	51%	35%	38%	43%	35%	50%
No awareness	59%	67%	49%	65%	60%	56%	62%	50%

Q1 Do you know the name of the Canadian organization responsible for overseeing oil and gas pipelines and electrical powerlines that cross a national, provincial, or territorial border?

Q2 The organization responsible for overseeing oil and gas pipelines and electrical powerlines that cross national, provincial, or territorial border is the Canada Energy Regulator or CER. Have you heard of the CER before today? BASE: Those not naming CER (n=991)

Prompted awareness of the CER is generally similar across demographic subgroups, with some exceptions. Awareness increases as education increases, from a low of 30 percent among those with a high school education or less to a high of 46 percent among those with a university degree. It is higher among those speaking English or French at home than other languages, and higher among those who later in the survey say they have seen or heard something recently about a pipeline or powerline project (50%).

3. Aided awareness of the National Energy Board

Just under half who have not heard of the CER when prompted have heard of the NEB

Those who had not heard of the Canada Energy Regulator even after prompting were asked if they had heard of it under its previous name, the National Energy Board or NEB. Close to half (45%) had heard of the NEB, while just over half (55%) had not. Having previously heard of the NEB (presented in the French version as the *l'Office national de l'énergie*) is notably lower in Quebec than other regions.

Aided awareness of the NEB among those not aware of the CER (n=599) – by region

Heard of NEB before survey	Total (n=599)	Region						
		BC (n=100)	AB (n=74)	MB/SK (n=65)	ON (n=120)	QC (n=112)	ATL (n=63)	TERR (n=65)
Yes, have heard of NEB	45%	52%	61%	53%	54%	19%	37%	35%
No, have not heard of NEB	55%	48%	39%	47%	46%	81%	63%	65%

Q3 The Canada Energy Regulator was formerly known as the National Energy Board or NEB. Have you heard of the NEB before today?

BASE: Those not aware of CER after prompting (n=599)

Having heard of the NEB increases as age increases (from 28% ages 18-34, up to 56% ages 55 and over) and is higher among men (59%, vs. 33% of women). Awareness of the NEB also increases as household income and level of education increase.

4. Familiarity with the CER

Three in ten who are aware of the CER say they are at least moderately familiar with it

Those who had heard of the CER prior to the survey (n=403) were asked to indicate, using a scale of 1 to 10, how familiar they are with the organization. Three in ten are at least somewhat familiar (31% scoring from 7 to 10), while slightly more are unfamiliar (36% scoring 1 to 4). Canadians are twice as likely to say they are not at all familiar (score 1-2) as very familiar (score 9-10). One-third give a neutral response.

Familiarity with the CER of those who have heard of it – by region

Level of familiarity with CER	Total (n=403)	Region						
		BC (n=50)	AB (n=77)	MB/SK (n=35*)	ON (n=80)	QC (n=88)	ATL (n=37*)	TERR (n=36*)
Net: familiar (score 7-10)	31%	36%	26%	38%	36%	25%	19%	12%
Very familiar (score 9-10)	8%	6%	8%	11%	11%	6%	-	-
Somewhat familiar (score 7-8)	23%	30%	18%	26%	25%	19%	19%	12%
Neutral (score 5-6)	33%	28%	40%	23%	27%	40%	37%	18%
Net: not familiar (score 1-4)	36%	34%	34%	40%	36%	35%	43%	70%
Not very familiar (score 3-4)	20%	20%	18%	14%	21%	19%	24%	29%
Not at all familiar (score 1-2)	16%	14%	16%	26%	15%	16%	19%	41%
Mean	5.2	5.4	5.0	5.1	5.5	5.0	4.7	3.5

Q4 Using a scale from 1 to 10, where 1 means "not at all familiar" and 10 means "extremely familiar," how familiar are you with the Canada Energy Regulator?

*Note – small base size (n<50) – caution is advised in interpreting results

BASE: Those with unaided or aided awareness of CER (n=403)

Being familiar with the CER is a minority position across the country and across population subgroups. It is lower in the Atlantic and the North. Being at least somewhat familiar is a minority of, but somewhat higher among, younger Canadians, those working full time and those who speak English at home.

5. Familiarity with CER functions

Around three in ten who have heard of the CER are at least moderately familiar with each of its main functions; one in ten or fewer are very familiar

Those indicating they are aware of the CER, aided or unaided (41%), were given information about four key functions and asked how familiar they are with each, using a ten-point familiarity scale. Around three in ten indicate they are at least somewhat familiar (score 7 to 10) with each, while one in ten or fewer are very familiar (score 9 or 10).

Familiarity with CER functions - those aware of the CER (n=403)

Function	Very familiar (9-10)	Somewhat familiar (7-8)	Neutral (5-6)	Not very familiar (3-4)	Not at all familiar (1-2)
Safety and Environment Oversight	9%	24%	32%	19%	16%
Engagement	9%	22%	30%	18%	19%
Energy Adjudication	8%	26%	28%	19%	19%
Energy Information	6%	24%	33%	19%	18%

Q4 How familiar, if at all, are you with each of the following functions of the Canada Energy Regulator or CER? Please use a scale from 1 to 10, where 1 means "not at all familiar" and 10 means "extremely familiar."

BASE: Those with unaided or aided awareness of CER (n=403)

There are no clear regional patterns in awareness of CER functions. Being at least somewhat familiar with the CER's energy adjudication and safety and environment oversight is slightly higher among Ontarians; Quebec residents are equally aware as Ontarians regarding energy information.

Net familiar (very, somewhat) with CER functions - those aware of the CER (n=403) – by region

Net familiar (score 7-10)	Total (n=403)	Region						
		BC (n=50)	AB (n=77)	MB/SK (n=35*)	ON (n=80)	QC (n=88)	ATL (n=37*)	TERR (n=36*)
Safety & Environment Oversight	33%	34%	26%	43%	38%	28%	25%	17%
Energy Adjudication	33%	32%	27%	37%	41%	26%	22%	22%
Engagement	31%	40%	26%	40%	38%	22%	22%	10%
Energy Information	29%	30%	18%	28%	33%	34%	14%	19%

Q5-8 How familiar, if at all, are you with each of the following functions of the Canada Energy Regulator or CER? Please use a scale from 1 to 10, where 1 means "not at all familiar" and 10 means "extremely familiar."

*Note – small base size (n<50) – caution is advised in interpreting results

BASE: Those with unaided or aided awareness of the CER (n=403)

Being at least somewhat familiar with each of these functions is somewhat higher among those who are working full time, those who have a university degree, and those who indicate they are at least somewhat familiar with the CER in general. Familiarity with safety and environment oversight and engagement is marginally higher among those age 18 to 34.

II. Interest in learning about the CER

1. Overall interest in learning about the CER

Three-quarters are at least somewhat interested in learning more about the CER

Regardless of previous awareness or familiarity with the CER, Canadians were asked how interested they would be in learning more about the CER in general. About three-quarters of Canadians express at least some level of interest in learning more; two in ten are very interested. One-quarter are not very or at all interested. Overall interest is highest in B.C. and similar across the rest of the country; strong interest is somewhat higher in Quebec and the North.

Interest in knowing more about the CER – by region

Interest in knowing more about the CER	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
NET: Interested	73%	82%	76%	72%	70%	73%	67%	67%
Very interested	20%	19%	19%	20%	18%	26%	18%	26%
Somewhat interested	53%	63%	57%	52%	52%	47%	49%	41%
NET: Not interested	27%	18%	24%	28%	30%	27%	33%	29%
Not very interested	20%	16%	18%	21%	23%	17%	27%	16%
Not at all interested	7%	2%	6%	7%	7%	10%	6%	13%
Don't know/Refused	<1%	-	-	-	-	-	-	4%

Q13 How interested are you in knowing more about the Canada Energy Regulator in general?

Overall interest in learning more about the CER is uniform across population subgroups (age, gender, household income). Interest increases as level of education increases (from 62% with high school or less, up to 80% with a university degree) and is higher among those who indicate they were aware of the organization prior to the survey (92% vs. 60% not aware). Interest in learning more is also linked to having some awareness of recent information about pipeline or powerline projects, when asked later in the survey.

2. Interest in learning about aspects of the CER's work

Six in ten or more are at least somewhat interested in knowing more about each of four aspects of the CER's work, with safety and environmental oversight garnering the most interest

Canadians were asked how interested they would be in learning more about four aspects of the CER's work. Six in ten or more would be at least somewhat interested in learning more about each aspect. Three-quarters indicate interest in knowing more about safety and environmental oversight; seven in ten would be interested in learning about energy information, and two-thirds about energy adjudication or reviewing applications. The least interest is expressed for learning more about engagement activities, at six in ten. Strong interest follows the same pattern, with just under three in ten being very interested (score 9 or 10) in hearing more about safety and environmental oversight.

Being at least somewhat interested in knowing more tends to be higher in British Columbia than in other provinces.

Interest in learning about aspects of the CER's work – by region

Interest in knowing more about aspects of CER's work	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
Safety and environment oversight								
Net: Interested	74%	82%	74%	72%	72%	77%	68%	67%
Very interested	28%	29%	24%	21%	30%	31%	25%	38%
Energy information								
Net: Interested	69%	79%	74%	61%	65%	73%	63%	58%
Very interested	22%	22%	22%	22%	20%	27%	18%	23%
Energy adjudication or reviewing applications								
Net: Interested	66%	72%	66%	66%	65%	68%	59%	61%
Very interested	18%	17%	16%	19%	17%	24%	14%	21%
Engagement activities								
Net: Interested	62%	69%	62%	63%	60%	63%	53%	67%
Very interested	16%	17%	15%	18%	17%	17%	14%	29%

Q9-12 How interested are you in knowing more about the following aspects of the Canada Energy Regulator's work?

Interest in CER activities is consistent across population subgroups, with some exceptions. Younger Canadians (age 18 to 34) are the most interested in hearing about engagement activities (69%, vs. 59% of others); those age 35 to 54 are somewhat less interested in safety and environment information (69%) than their younger (78%) or older (77%) counterparts. Interest in these topics is somewhat higher among those in middle income households than those with less than \$40,000, or \$100,000 or more. In all cases, interest increases as level of education increases, and is higher among those aware of the CER prior to the survey, those who are more familiar with it, and those who indicate later in the survey they have heard or seen information recently about pipelines or powerlines.

III. Confidence in and perceptions of the CER

1. Confidence in the CER

Canadians are most likely to be confident the CER ensures compliance with regulations, enhances our global competitiveness, ensures public safety and makes evidence-based decisions

Canadians were presented with eight statements about the CER and asked to indicate their level of confidence in each, using a ten-point scale. Strong confidence (scoring 9 or 10) is around one in ten for each statement. Four in ten or more are at least somewhat confident in half of the statements: that the CER ensures companies comply with relevant rules and regulations, that it makes decisions that effectively ensure public safety, that its decisions are based on scientific evidence, and that its decisions enhance the country's global competitiveness. Just under four in ten agree to some extent with three other statements; Canadians are least likely to agree that the CER's decisions advance reconciliation with Indigenous Peoples.*

Confidence in aspects of the CER's work

The CER ('s)...	Net: confident (7-10)	Very confident (9-10)	Somewhat confident (7-8)	Neutral (5-6)	Not very confident (3-4)	Not at all confident (1-2)
...ensures pipeline/powerline companies comply with relevant rules/regulations	45%	13%	32%	33%	14%	8%
...makes decisions that effectively ensure public safety	43%	12%	31%	35%	13%	9%
...decisions are based on the best available scientific information and data	43%	12%	30%	35%	14%	9%
...decisions enhance Canada's global competitiveness	41%	13%	28%	36%	14%	9%
...makes decisions that effectively protect the environment	38%	10%	28%	33%	17%	12%
...makes decisions in the public interest, for energy projects like new pipelines and power lines	38%	9%	30%	34%	16%	11%
...decisions contribute to an inclusive society	35%	9%	25%	38%	17%	10%
...decisions advance reconciliation with Indigenous Peoples*	31%	9%	22%	36%	18%	14%

Q14-21 Using a scale from 1 to 10, where 1 means "not at all confident" and 10 means "very confident," please indicate how confident are you for each

* Note: the survey field period occurred during the Wet'suwet'en First Nation pipeline demonstrations across the country.

In general, men are more likely than women to have at least some confidence in most of these statements, except ensuring public safety, where confidence is similar. Confidence is also somewhat higher among those in middle-income households than those with under \$40,000; and lower among those with high school or less education than others with higher educational attainment. Having at least some confidence is linked to having been previously aware of the CER, to being more familiar with the organization, and to having heard or seen something recently about a pipeline or powerline project (when asked later in the survey).

Regionally, confidence is fairly comparable across the country, but can be somewhat higher in British Columbia than other regions.

Confidence in aspects of the CER's work – by region

Confidence	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
The CER ensures pipeline and powerline companies comply with the relevant rules and regulations								
Net: Confident (score 7-10)	45%	51%	44%	51%	46%	42%	34%	37%
Very confident (score 9-10)	13%	18%	14%	14%	12%	10%	12%	10%
The CER's decisions enhance Canada's global competitiveness								
Net: Confident (score 7-10)	41%	54%	35%	42%	40%	40%	32%	35%
Very confident (score 9-10)	13%	19%	12%	16%	12%	10%	12%	10%
The CER makes decisions that effectively ensure public safety								
Net: Confident (score 7-10)	43%	53%	40%	44%	42%	43%	39%	42%
Very confident (score 9-10)	12%	17%	15%	13%	12%	9%	11%	18%
The CER's decisions are based on the best available scientific information and data								
Net: Confident (score 7-10)	43%	51%	34%	41%	43%	43%	43%	35%
Very confident (score 9-10)	12%	19%	12%	16%	12%	9%	10%	5%
The CER makes decisions that effectively protect the environment								
Net: Confident (score 7-10)	38%	47%	38%	40%	35%	37%	41%	22%
Very confident (score 9-10)	10%	12%	13%	14%	12%	6%	8%	10%
The CER makes decisions in the public interest, for energy projects like new pipelines and power lines								
Net: Confident (score 7-10)	38%	45%	30%	39%	40%	39%	33%	33%
Very confident (score 9-10)	9%	12%	12%	10%	9%	5%	8%	14%
The CER's decisions contribute to an inclusive society								
Net: Confident (score 7-10)	35%	40%	33%	34%	34%	36%	27%	24%
Very confident (score 9-10)	9%	12%	9%	10%	10%	7%	9%	12%
The CER's decisions advance reconciliation with Indigenous Peoples								
Net: Confident (score 7-10)	31%	35%	30%	35%	32%	27%	30%	24%
Very confident (score 9-10)	9%	11%	12%	10%	9%	6%	8%	8%

Q14-21 Using a scale from 1 to 10, where 1 means "not at all confident" and 10 means "very confident," please indicate how confident are you for each of the following?

2. Perceptions of the CER

Six in ten or more say each of four attributes at least somewhat describes the CER; it is most fully described as being “expert”

Canadians were asked to indicate the extent to which four terms describe the CER. Six in ten or more say each at least somewhat describes the organization, but they are most likely to think the CER is described, at least somewhat or fully, as “Expert.” Seven in ten say the organization is described by the term “Fair,” and just under two-thirds say this about “Timely.” Six in ten feel “Open and transparent to the public” describes it at least somewhat.

Opinions are generally similar across the country and across subgroups, with some exceptions. Saying each term at least somewhat describes the CER is still the majority of, but lower among, residents of Alberta and the North, although the latter is likely a mode difference, as telephone respondents could voice their uncertainty (15% to 21% per term did not know enough to say).

Extent to which terms describe the CER – by region

Term describes the CER	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
Expert								
Net: Describes	78%	85%	64%	77%	80%	80%	74%	58%
Fully describes	21%	22%	17%	22%	18%	26%	20%	10%
Fair								
Net: Describes	69%	75%	66%	77%	70%	64%	73%	68%
Fully describes	11%	14%	12%	14%	9%	12%	9%	8%
Timely								
Net: Describes	64%	67%	51%	66%	64%	68%	66%	52%
Fully describes	10%	13%	8%	13%	9%	10%	6%	7%
Open and transparent to the public								
Net: Describes	61%	67%	55%	61%	61%	59%	58%	60%
Fully describes	11%	15%	9%	15%	11%	11%	9%	16%

Q22-25 To what extent do each of the following describe the Canada Energy Regulator?

There is no difference by gender, but younger Canadians (age 18 to 34) are the most likely to say each attribute at least somewhat describes the CER. There are no clear patterns by education or household income, but saying each describes the CER is higher among those who were aware of the organization before the survey. Saying each describes the CER is also normally higher among those with more familiarity with it, with one exception: the term “Expert,” where opinion is similar regardless of self-professed level of familiarity.

IV. Pipeline/powerline information/awareness

1. Awareness of recent pipeline/powerline projects in Canada

Six in ten have recent awareness of proposed or existing pipeline or powerline projects

Canadians were asked if they had seen, heard or read anything recently about proposed or existing pipelines or powerline projects in the country. Six in ten say they had.¹ Having seen something about pipelines or powerlines recently is similar across the country, although somewhat lower in Quebec.

Awareness of recent information on pipelines/powerline projects – by subgroups

Have seen/heard/read anything recently	Total (n=1,002)	Region						
		BC (n=150)	AB (n=151)	MB/SK (n=100)	ON (n=200)	QC (n=200)	ATL (n=100)	TERR (n=101)
Yes (have recent awareness)	62%	69%	70%	72%	65%	45%	60%	65%
No (no recent awareness)	38%	31%	30%	28%	35%	55%	40%	35%

Q26 Have you seen, heard or read anything recently about proposed or existing pipelines or powerline projects in Canada?

There are some notable subgroup differences in having seen recent information about pipelines or powerlines. Reporting having taken in recent information is higher among men (69%, vs. 54% of women) and among those age 55 and over (70%) or retired people (73%). It is higher among those with a university degree (75%), and those who speak English at home (67%, vs. 46% speaking French). It is higher among those who had heard of the CER prior to the survey (77%) than those who had not (51%).

¹ Note the survey field period occurred during the Wet'suwet'en First Nation pipeline demonstrations across the country and solidarity protests elsewhere, which received national media attention.

2. Where heard/saw recent energy project information

Canadians are most likely to have seen or heard about pipeline/powerline projects on TV

Those who indicated they had recent awareness of pipelines or powerlines information (n=635) were asked where they had seen or heard this. In the online survey they were presented with a list of options, and they had an option to provide additional sources. On the telephone, residents of the Territories were read a couple of examples. Multiple responses were permitted.

Seven in ten say it was on television, by far the top response. Three in ten each report having seen something on social media or on a web site, or heard it on the radio. One-quarter report seeing this information in a major newspaper. Two in ten mention word of mouth, and just under this indicate local newspapers. Only very small proportions mention any other sources.

Where saw/heard recent project energy information – by region

Where saw/heard energy project information	Total (n=635)	Region						
		BC (n=103)	AB (n=106)	MB/SK (n=72)	ON (n=130)	QC (n=90)	ATL (n=60)	TERR (n=74)
On TV	70%	68%	72%	58%	69%	78%	75%	42%
Social media (general)	31%	41%	39%	29%	28%	23%	42%	26%
On radio	29%	25%	38%	27%	29%	30%	19%	16%
On a website	28%	27%	30%	32%	26%	26%	34%	24%
Major city or national (daily) newspaper	25%	25%	31%	18%	25%	27%	19%	8%
Word of mouth	20%	29%	29%	15%	12%	23%	22%	8%
Local community/weekly newspaper	17%	25%	18%	19%	17%	10%	17%	10%
Surveys	1%	1%	-	-	1%	1%	-	-
E-mail	<1%	-	1%	1%	-	-	-	-
Other	<1%	1%	-	1%	-	-	-	<1%
I don't recall / DK/NA	<1%	-	-	-	-	-	-	1%

Q27 Do you recall where you saw or heard this recent information about pipelines or powerline projects? (PHONE: was it on TV, in your local community newspaper, or somewhere else?)

BASE: Those who saw/heard something recently about pipeline/powerline projects (n=635)

Responses are generally quite similar across the country and population subgroups. Television is the top response, although somewhat lower in Manitoba/Saskatchewan (58%) and the North (42%), which are also the least likely to mention a major newspaper. Saying television was the source is higher among men (77% vs. 62% of women) and among those age 55 and over (83%) and retired people (84%); younger Canadians age 18 to 34 are the most likely to mention social media (45% age 18 to 34), radio (38%), web sites (43%) or local newspapers (24%). Having seen related information in a major newspaper is highest among those with household incomes of \$150,000 or more (41%) and those with university degrees (35%). There are no clear patterns by awareness of or familiarity with the CER.

3. Source of recent energy project information

Canadians are most likely to say the government or environmental groups were the source of the recent information they heard about pipelines/powerlines; two in ten say it was the Canada Energy Regulator

Those who indicated they had recent awareness of pipelines or powerlines information (n=635) were asked about the originator or source of the information. Again, answer categories were provided online, and suggestions read on the telephone. Multiple responses were permitted, and respondents could include answers not listed.

The most cited source is the government, by half (52%). Four in ten say environmental groups, and one-quarter say it came from energy companies. Two in ten say the information came from the CER, and just under this say it was from industry groups. Fewer than one in ten indicate other sources of pipeline or powerline information.

Source of recent energy project information – by region

Information source	Total (n=635)	Region						
		BC (n=103)	AB (n=106)	MB/SK (n=72)	ON (n=130)	QC (n=90)	ATL (n=60)	TERR (n=74)
Government	52%	53%	58%	47%	50%	54%	57%	13%
Environmental groups	41%	54%	36%	40%	38%	37%	44%	14%
Energy companies	24%	25%	38%	17%	22%	19%	23%	3%
Canada Energy Regulator/CER	19%	16%	16%	20%	20%	20%	17%	9%
Industry groups	16%	20%	24%	8%	16%	12%	9%	3%
News reports (various)	8%	10%	7%	4%	8%	9%	10%	30%
Indigenous groups	2%	2%	1%	1%	2%	-	2%	15%
Word of mouth	<1%	1%	-	1%	-	-	-	-
Social media (general)	<1%	-	1%	-	-	-	-	-
Other	<1%	-	1%	-	-	-	-	-
I don't recall / DK/NA	6%	8%	4%	10%	6%	2%	8%	27%

Q28 Do you recall the source or originator of the information you recently saw or heard? (PHONE: Would it have been from the Canada Energy Regulator or other government agency, from an energy company or industry group, an environmental group, or something else?)

BASE: Those who saw/heard something recently about pipeline/powerline projects (n=635)

Responses are generally similar across Canada and most subgroups. Among those in the online survey, BC residents are the most likely to indicate the source was environmental groups, while Albertans are the most likely to say it was from energy companies or industry groups. In the telephone survey, Territorial respondents were most likely to say the information came from a news report of some kind, and they are more likely than others to indicate the source was an Indigenous group.

Saying the information they saw or heard came from the CER is highest among those aged 18 to 34 (36%) and those with household incomes of \$150,000 or more (37%), those working full time (26%), and those who were aware of CER before the survey (27%) or who are more familiar with it (45%).

Appendix A: Methodology

This research consisted of a mixed-mode survey of adult Canadians:

- 1) An online survey of 900 Canadians. Survey respondents were selected from registered members of an online panel. Since the samples used in online panel surveys are based on self-selection and are not a random probability sample, no formal estimates of sampling error can be calculated. Although opt-in panels are not random probability samples, online surveys can be used for general population surveys provided they are well designed and employ a large, well-maintained panel.
- 2) A telephone survey of 100 residents of the three northern territories, as an online sample there would have been insufficient. This survey was conducted using industry-standard random-digit-dialling techniques. The margin of sampling error on a sample of this size is ± 9.7 percentage points, 19 times out of 20.

Sample design and weighting

Environics Research conducted an online survey of 901 Canadians who are members of an online panel. The sampling method was designed to complete interviews with at least 900 Canadians ages 18 and over. Quotas were set by age, gender, and region to balance the sample. Environics simultaneously conducted a telephone survey of 101 adult Canadians living in the northern territories, using the same questionnaire and industry-standard random-digit-dialling techniques.

The survey obtained the following regional distribution:

Target group	Proportion of population	Target (quota)	Actual Unweighted	Actual Weighted*
Total	100%	1,000	1,002	1,002
Atlantic	7%	100	100	66
Quebec	23%	200	200	232
Ontario	38%	200	200	384
MB/SK	7%	100	100	68
Alberta	11%	150	151	116
BC	14%	150	150	133
Territories	<1%	100	101	2

*Results are weighted by region, gender and age to 2016 Census data.

Questionnaire design

The Canada Energy Regulator provided Environics with topics required for the survey. Environics then designed a questionnaire in consultation with the CER to ensure its research objectives were met. Upon approval of the English questionnaire, the CER translated the questionnaire into French.

Environics' data analysts programmed the questionnaires, then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the surveys' basic logic. The data collection system handles sampling invitations, quotas and questionnaire completion (skip patterns, branching, and valid ranges).

Prior to finalizing the survey for the

field, a pre-test (soft launch) was conducted in English and French. The pre-test assessed the questionnaires in terms of question wording and sequencing, respondent sensitivity to specific questions and to the survey overall, and to determine the survey length; standard Government of Canada pre-testing questions were also asked. As no changes were required following the pre-test, the n=21 responses (11 English, 10 French) have been included in the final data set.

The final survey questionnaire is included in Appendix B.

Fieldwork

The main survey was conducted by Environics using a secure, fully featured web-based survey environment. The interviews took place from February 4 (soft launch pre-test) to February 18, 2020. The telephone survey used a computerized automated interviewing system (CATI) version of the online questionnaire and responses were entered by an interviewer. The telephone survey took place from February 6 to 11, 2020.

All respondents were offered the opportunity to complete the surveys in their official language of choice. All research work was conducted in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research – Online Surveys and recognized industry standards, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA). The study was registered with the Canadian Research Insights Council’s Research Verification Service so respondents could validate its authenticity.

The data from this survey are statistically weighted to ensure the sample is as representative of this population as possible according to the most recently available Census information.

Completion results

The completion results are presented in the following table.

Contact disposition – online survey

Disposition	N
Total number of sample units invited to participate	102,762
Invalid (undelivered)	0
Broadcasts delivered	102,762
Unresolved (U)	94,063
Did not respond	94,063
In-scope non-responding (IS)	4,436
Qualified respondent break-off	4,436
In-scope - responding (R)	4,263
Disqualified	115
Quota filled	3,247
Completed	901
Contact rate [(R+IS)/ (U + IS + R)]	8%
Participation rate [R / (U + IS + R)]	4%

Contact disposition – telephone survey

Disposition of calls	TOTAL
Total sample dialled	3,706
Unresolved numbers (U)	2,086
Busy	173
No answer	757
Voicemail	1,156
Resolved numbers (<i>Total minus Unresolved</i>)	1,620
Out of scope (<i>Invalid/non-eligible</i>)	191
Non-household	6
Not-in-service	165
Fax/modem	20
In-scope non-responding (IS)	1,203
Refusals – household	289
Refusals – respondent	465
Language barrier	29
Callback missed/respondent not available/ill	412
Break-offs (interview not completed)	8
In-scope - responding (R)	226
Disqualified	112
Quota filled	13
Completed	101
Response rate [R / (U + IS + R)]	6%

Respondent profile

The following table presents the weighted distribution of survey participants by key demographic and other variables.

Variable	Total sample %
Age	
18-34	27
35-54	34
55+	39
Gender	
Female	49
Male	51
Education	
High school or less	26
Trades/some post sec	19
College	21
University graduate/post-graduate	34
Employment status	
Full time/self employed	50
Part time	8
Not employed (student, unemployed, homemaker etc.)	15
Retired	26
Total annual household income	
Under \$40,000	30
\$40,000-<\$60,000	20
\$60,000-<\$80,000	15
\$80,000-<\$100,000	14
\$100,000+	21
Language spoke most at home	
English	76
French	25
Other	4

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2016 Census information). As is the case with most surveys, the final sample underrepresents those with high school or less education, which is a typical pattern for public opinion surveys in Canada (e.g., those with more education are more likely to respond to public opinion surveys).

Sample profile

Sample type	Sample*	Canada (2016 Census)
Gender (18+)		
Male	49%	49%
Female	51%	51%
Age		
18-34	27%	29%
35-49	25%	24%
50-64	28%	26%
65+	20%	21%
Education level^α		
High school diploma or less	27%	35%
Trades/college/post sec no degree	40%	36%
University degree	32%	29%

* Data are unweighted and percentaged on those giving a response to each demographic question

^α Actual Census categories differ from those used in this survey and have been recalculated to correspond. Statistics Canada figures for education are for Canadians aged 25 to 64 years.

Appendix B: Quantitative research instrument

EnviroNics Research Group

January 31-2020

Canada Energy Regulator Annual Public Opinion Research Measures Questionnaire

TELEPHONE INTRODUCTION

Hello/Bonjour, my name is _____ and I am calling from EnviroNics Research, a public opinion research company, on behalf of the Government of Canada. Today we are conducting a survey of people in Canada ages 18 years and over on important and current topics.

Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? (**IF NEEDED:** Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français.)

RECORD Language of interview

- 01 Anglais
- 02 Français

Please be assured that we are not selling or soliciting anything. The survey is voluntary. It takes about 15 minutes to complete and your responses will be kept entirely confidential and anonymous and will be administered in accordance with the Privacy Act. This call may be monitored or recorded for quality control purposes.

TELEPHONE: IF ASKED: This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website www.canadianresearchinsightscouncil.ca. If you choose to verify the authenticity of this research, you can reference project code **20200131-EN185**.

IF LANDLINE SAMPLE: May I please speak with the person in your household who is 18 years of age or older and who has had the most recent birthday? Would that be you? [IF THAT PERSON IS NOT AVAILABLE ARRANGE CALLBACK]"

IF CELLPHONE SAMPLE: Are you at least 18 years old?

IF CELL PHONE SAMPLE ASK A AND B

- A Are you in a safe place to talk –for example not operating a motor vehicle?
- Yes [RE-INTRODUCE YOURSELF, IF NECESSARY]
 - No [ARRANGE CALLBACK DATE/TIME]
- B At home, do you have a traditional telephone line other than a cell phone?
- Yes CHECK AGAINST QUOTA
 - No CHECK AGAINST QUOTA

WEB INTRODUCTION

Please select your preferred language for completing the survey /
SVP choisissez votre langue préférée pour remplir le sondage

01- English / Anglais

02- Français / French

Welcome to this survey being conducted by Environics Research, an independent research company, on behalf of the Government of Canada. The survey will take about 10 minutes of your time.

Note: If you genuinely have no opinion about a question or cannot answer it, please click through to the next question. There are only a few key questions where your answer will be required in order to move forward.

Please be assured that we are not selling or soliciting anything. The survey is voluntary and your responses will be kept entirely confidential and anonymous and will be administered in accordance with the Privacy Act.

This study has been registered with the Canadian Research Insights Council's Research Verification Service so that you may validate its authenticity. If you would like to enquire about the details of this research, you can visit CRIC's website www.canadianresearchinsightscouncil.ca. If you choose to verify the authenticity of this research, you can reference project code **20200131-EN185**.

Thank you in advance for your participation.

[IF LANDLINE RECORD REGION FROM SAMPLE]**[IF CELL PHONE SAMPLE OR ONLINE ASK C]**

C In which province or territory do you live?

PHONE: DO NOT READ LIST - ACCEPT ONLY 11, 12, 13 – OTHER THANK AND TERMINATE

ONLINE – DROP DOWN LIST: *Select one only.*

Newfoundland and Labrador	1
Prince Edward Island	2
Nova Scotia	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11
Northwest Territories	12
Nunavut	13

D. In what year were you born?

RECORD YEAR – TERMINATE IF UNDER 18 (MIN VALUE 1900, MAX VALUE 2002]

IF RESPONDENT DECLINES TO PROVIDE A PRECISE BIRTH YEAR: Would you be willing to indicate in which of the following age categories you belong?

PHONE: READ UNTIL CATEGORY REACHED

ONLINE – DROP DOWN LIST: Select one only.

- 01 – 18 to 19
- 02 – 20 to 24
- 03 – 25 to 29
- 04 – 30 to 34
- 05 – 35 to 39
- 06 – 40 to 44
- 07 – 45 to 49
- 08 – 50 to 54
- 09 – 55 to 59
- 10 – 60 to 64
- 11 – 65 and over

VOLUNTEERED

99 - REFUSED

E. What is your gender?

PHONE IF NECESSARY/SHOW ONLINE: Gender refers to current gender which may be different from sex assigned at birth and may be different from what is indicated on legal documents.

PHONE: DO NOT READ LIST EXCEPT TO CLARIFY

01 – Man

02 – Woman

97 – Or please specify (**RECORD SPECIFIC RESPONSE IF PROVIDED; DO NOT PROBE**)

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Prefer not to say

F. **[TO BE ASKED ON CATI ONLY – DO NOT SHOW ONLINE]**

Which of the following best describes you? Are you...?

PHONE: READ UNTIL CATEGORY REACHED

01 - First Nations

02 - Inuk

03 - Métis

04 - or, a non-Indigenous person

VOLUNTEERED

05 - Inuit

06 - Inuvialuit

98 - Other (SPECIFY _____)

99 - REFUSE

Awareness And Familiarity

1. Do you know the name of the Canadian organization responsible for overseeing oil and gas pipelines and electrical powerlines that cross a national, provincial, or territorial border?

ONLINE: Please type in your response

Or – Not sure (99)

SKIP TO Q3 IF ANY OF THE FOLLOWING ENTERED – PLEASE MATCH FOR ALL CASES IN BACKEND:

Canada Energy Regulator

Canada's Energy Regulator

Canadian Energy Regulator

CER

C.E.R.

TELEPHONE: DO NOT READ

01 – Canada Energy Regulator

02 – Canada's Energy Regulator

03 – Canadian Energy Regulator

04 – CER

97– OTHER – SPECIFY _____

99 – DK/NA (SINGLE PUNCH)

2. **IF NOT 01-04 AT Q1 ASK:** The organization responsible for overseeing oil and gas pipelines and electrical powerlines that cross national, provincial, or territorial border is the Canada Energy Regulator or CER. Have you heard of the CER before today?

01 - Yes

02 - No

VOLUNTEERED – DO NOT SHOW ONLINE

99 – DK/NA

3. **IF NO OR DK AT Q2 ASK:** The Canada Energy Regulator was formerly known as the National Energy Board or NEB. Have you heard of the NEB before today?

01 - Yes

02 - No

VOLUNTEERED – DO NOT SHOW ONLINE

99 – DK/NA

IF NO OR DK AT Q2 SKIP TO Q9

4. **IF 01-04 AT Q1 OR YES AT Q2 ASK:** Using a scale from 1 to 10, where 1 means "not at all familiar" and 10 means "extremely familiar," how familiar are you with the Canada Energy Regulator?

Not at all familiar	1
	2
	3
	4
	5
	6
	7
	8
	9
Extremely familiar	10

VOLUNTEERED– DO NOT SHOW ONLINE

Not sure 99

IF 01-04 AT Q1 OR YES AT Q2 ASK How familiar, if at all, are you with each of the following functions of the Canada Energy Regulator or CER? Please use a scale from 1 to 10, where 1 means "not at all familiar" and 10 means "extremely familiar."

RANDOMIZE. ONLINE: CAROUSEL

5. Energy Adjudication (**NOTE TO INTERVIEWERS: PRONOUNCED** Add-joo-dee-CAY-shun) or reviewing applications: Making decisions or recommendations to the federal government in relation to proposed pipelines, international power lines, and other matters.
6. Safety and Environment Oversight: Setting and enforcing regulatory expectations for companies regulated by CER.
7. Energy Information: Collecting, analyzing and publishing information on energy markets and supply, sources of energy, and the safety and security of pipelines and international power lines.
8. Engagement: Engaging with stakeholders and Indigenous Peoples on topics within the CER's mandate and role.

Not at all familiar	1
	2
	3
	4
	5
	6
	7
	8
	9
Extremely familiar	10

VOLUNTEERED– DO NOT SHOW ONLINE

Not sure 99

Interest In Learning About CER

ASK ALL

How interested are you in knowing more about the following aspects of the Canada Energy Regulator's work?

Q9-12: RANDOMIZE. ONLINE: CAROUSEL.

9. Energy adjudication or reviewing applications (**NOTE TO INTERVIEWERS: PRONOUNCED** Add-joo-dee-CAY-shun) (**IF Q5 NOT ASKED SHOW/READ:** Making decisions or recommendations to the federal government in relation to proposed pipelines, international power lines, and other matters)
10. Safety and environment oversight (**IF Q6 NOT ASKED SHOW/READ:** Setting and enforcing regulatory expectations for companies regulated by CER)
11. Energy information (**IF Q7 NOT ASKED SHOW/READ:** Collecting, analyzing and publishing information on energy markets and supply, sources of energy, and the safety and security of pipelines and international power lines)
12. Engagement activities (**IF Q8 NOT ASKED SHOW/READ:** Engaging with stakeholders and Indigenous Peoples on topics within the CER's mandate and role.)

01 – Very interested

02 – Somewhat interested

03 – Not very interested

04 – Not at all interested

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don't know/Refused

13. How interested are you in knowing more about the Canada Energy Regulator *in general*?

01 – Very interested

02 – Somewhat interested

03 – Not very interested

04 – Not at all interested

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don't know/Refused

Confidence in the CER

Using a scale from 1 to 10, where 1 means "not at all confident" and 10 means "very confident," please indicate how confident are you for each of the following?

RANDOMIZE. ONLINE: CAROUSEL

14. The CER makes decisions in the public interest for energy projects like new pipelines and power lines
15. The CER makes decisions that effectively protect the environment
16. The CER makes decisions that effectively ensure public safety
17. The CER ensures pipeline and powerline companies comply with the relevant rules and regulations
18. The CER's decisions enhance Canada's global competitiveness
19. The CER's decisions advance reconciliation with Indigenous Peoples
20. The CER's decisions are based on the best available scientific information and data
21. The CER's decisions contribute to an inclusive society

Not at all confident	1
	2
	3
	4
	5
	6
	7
	8
	9
Very confident	10

VOLUNTEERED— DO NOT SHOW ONLINE

Not sure	99
----------	----

Perceptions

To what extent do each of the following describe the Canada Energy Regulator?

RANDOMIZE. ONLINE: CAROUSEL

- 22. Timely
- 23. Expert
- 24. Fair
- 25. Open and transparent to the public

01 – Fully describes CER

02 – Somewhat describes CER

03 – Does not really describe CER

04 – Does not at all describe CER

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don't know/Refused

Information/awareness

- 26. Have you seen, heard or read anything recently about proposed or existing pipelines or powerline projects in Canada?

01 – Yes

02 – No

SKIP TO DEMOGRAPHICS

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Not sure

SKIP TO DEMOGRAPHICS

- 27. Do you recall where you saw or heard this recent information about pipelines or powerline projects? (PHONE: was it on tv, in your local community newspaper, or somewhere else?)

PHONE: DO NOT READ LIST UNLESS NECESSARY - IF "NEWSPAPER" PROBE FOR TYPE OF NEWSPAPER

ONLINE: SHOW 1-97

01 – On TV

02 – On radio

03 – Local community or weekly newspaper

04 – Major city or national (daily) newspaper

05 – On a website

06 – Social media (general)

07 – Word of mouth (friends, family etc.)

SHOW ONLINE/ VOLUNTEERED PHONE

97 – Other – Please specify _____

VOLUNTEERED – DO NOT SHOW ONLINE

99 – I don't recall / DK/NA **(SINGLE PUNCH)**

28. Do you recall the source or originator of the information you recently saw or heard? (PHONE: Would it have been from the Canada Energy Regular or other government agency, from an energy company or industry group, an environmental group, or something else?)

PHONE: DO NOT READ LIST UNLESS NECESSARY

ONLINE: SHOW 1-97

01 – Canada Energy Regulator/CER

02 – Government

03 – Energy companies

04 – Industry groups

05 – Environmental groups

SHOW ONLINE/ VOLUNTEERED PHONE

97– Other – Please specify _____

VOLUNTEERED – DO NOT SHOW ONLINE

99 – I don't recall / DK/NA (SINGLE PUNCH)

Respondent Demographics

Finally, here are some questions that will help us analyze the results of this survey...

29. What is the highest certificate, diploma or degree that you have completed?

PHONE: DO NOT READ LIST EXCEPT TO CLARIFY

ONLINE: SHOW 1-7

01 – Less than a high school diploma or its equivalent

02 – High school diploma or a high school equivalency certificate

03 – Trades certificate or diploma

04 – College, CEGEP or other non-university certificate or diploma (other than trades certificates or diplomas)

05 – University certificate, diploma or degree below the bachelor's level

06 – Bachelor's Degree (e.g., B.A., B.A. (Hons), B.Sc., B.Ed., LL.B.)

07 – University certificate, diploma or degree above the bachelor's level

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don't know/Refused

30. What language do you speak most often at home?

PHONE: DO NOT READ LIST – ACCEPT ALL THAT APPLY

SHOW 1-3 ONLINE: *Select all that apply*

01 - English

02 - French

03 - Other

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don't know/Refused

31. Which of the following categories best describes your current employment status? Are you...

**PHONE: READ LIST – ACCEPT ONE ANSWER ONLY 0 STOP READING WHEN REACHING RESPONDENT CATEGORY
ONLINE: SHOW 01-07**

- 01 - Working full-time, that is, 35 or more hours per week
- 02 - Working part-time, that is, less than 35 hours per week
- 03 - Self-employed
- 04 - Unemployed, but looking for work
- 05 - A student attending school full-time
- 06 - Retired
- 07 - Not in the workforce [**INTERVIEWER ONLY: FULL-TIME HOMEMAKER, UNEMPLOYED, NOT LOOKING FOR WORK**]
- VOLUNTEERED – DO NOT SHOW ONLINE**
- 97– Other [DO NOT SPECIFY]
- 99 – Refused

32. Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes.

**PHONE: READ LIST – STOP WHEN REACH RESPONDENT’S CATEGORY
ONLINE: SHOW 1-7**

- 01 - Under \$20,000
- 02 - \$20,000 to just under \$40,000
- 03 - \$40,000 to just under \$60,000
- 04 - \$60,000 to just under \$80,000
- 05 - \$80,000 to just under \$100,000
- 06 - \$100,000 to just under \$150,000
- 07 - \$150,000 and above

VOLUNTEERED – DO NOT SHOW ONLINE
99 – Refuse/NA

33. And finally, to better understand how results vary by region, what are the first three digits of your postal code?

— — —

**SHOW ONLINE: 999 – Prefer not to answer
PHONE VOLUNTEERED ONLY: 999 – Prefer not to say**

ENG/FRE END PAGE MESSAGES SHOWN TO RESPONDENTS

[SHOW ALL RESPONDENTS WHO COMPLETE] This survey was conducted on behalf of the Canada Energy Regulator and is registered under the Federal Access to Information Act. Thank you very much for your participation.

[SHOW TO ALL RESPONDENTS WHO DO NOT QUALIFY] We’re sorry. You do not meet the qualifications for this survey. We sincerely thank you and appreciate your time, dedication, and continued participation in our online surveys.

[SHOW TO ALL RESPONDENTS WHO RECEIVE QUOTA FULL] Unfortunately the quota has been reached for your demographic and/or region. We sincerely thank you and appreciate your time, dedication, and continued participation in our online surveys.