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Regulator

Régie de l'énergie
du Canada

Annual Public Opinion Research Measures 2022

Final Report

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Canada Energy Regulator – Annual Public Opinion Research Measures 2022 Final report

Prepared for Canada Energy Regulator by Environics Research

March 2022

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This public opinion research report presents the results of quantitative and qualitative research conducted by Environics on behalf of the Canada Energy Regulator. The quantitative research was conducted online and by telephone with the general population, from January 19 to February 7, 2022, and the qualitative research was conducted from February 8 to 10, 2022.

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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 commissioned its third annual tracking study in early 2022. The CER intends to use this study 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

Quantitative phase

Environics Research surveyed 1,008 Canadian adults (aged 18 years and older) between January 19 to February 7, 2022. The sample included 906 Canadians from the provinces who are members of an online panel. To reach Canadians in the northern territories, Environics completed 102 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 | 1,008 | 1,008 |
| Atlantic | 7% | 100 | 99 | 67 |
| Quebec | 23% | 200 | 210 | 234 |
| Ontario | 38% | 200 | 206 | 386 |
| MB/SK | 7% | 100 | 94 | 69 |
| Alberta | 11% | 150 | 146 | 117 |
| BC | 14% | 150 | 151 | 134 |
| Territories | <1% | 100 | 102 | 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.

Qualitative phase

The qualitative phase consisted of a two-day online community. Participants were screened during the quantitative survey and a selection of respondents were invited to participate in the online bulletin board community. The bulletin boards required input from participants on two separate days and the process was over a three-day window, from February 8-10, 2022. A total of 113 Canadian adults from across the country participated (88 in English and 25 in French) and each participant was given an honorarium of \$100. Since participants were screened, the qualitative community received a demographic mix of gender, age, education levels, income levels and region. The detailed methodology and participant profiles are presented in Appendix B of this report.

3. Cost of research

The cost of this research was \$139,148.63 (including HST).

4. Key findings

Quantitative findings

Canadians' confidence in CER remains steady, at a good level, especially in relation to ensuring companies comply with regulations, ensuring public safety and making decisions based on scientific evidence. Belief that the CER acts in the public interest and increases global competitiveness have rebounded slightly, after declining in 2021 from 2020 levels. Most Canadians continue to view the CER as an expert in its field: three in four this year say the term "expert" at least somewhat describes the CER.

After increasing slightly between 2020 and 2021, unaided awareness of the CER held steady this year; the Canada Energy Regulator (CER) is still not a top-of-mind name among Canadians, and no one organization is top of mind. Eight in ten cannot think of the name of the organization responsible for the CER's mandate without prompting. Aided awareness of the "Canada Energy Regulator" stands at one in three, down slightly from prior years.

Consistent with 2020 and 2021, among those who have heard of the CER, three in ten (33%) indicate they are familiar with it (score 7 to 10 on a 10-point familiarity scale). Familiarity with each of CER's specific functions is up this year, from about one in four last year to approximately four in ten now. Many Canadians continue to express interest in knowing more about the CER: two in three are at least moderately interested in learning more about the CER itself, and about six in ten have modest interest in learning about each of its main functions.

Awareness of energy projects is down substantially this year, from about six in ten in 2021, roughly one in three now report having heard or seen information recently about existing or intended pipeline or powerline projects. Television remains the most cited source for this information, followed at some distance by daily newspapers, radio and social media. As in past years, government is most often mentioned as the source of this information, followed by environmental groups; one in six (up from one in ten) believe the Canada Energy Regulator was the source of this information.

Qualitative findings

The qualitative research touched on understanding of the CER mission, vision and main priorities (from its strategic plan), as well as interest in learning more about the organization and their preferred format(s) for information.

The results suggest some participants understand the intent of the CER mission, describing it as regulating industry, while respecting the environment and Indigenous communities, and ensuring safety. Other respondents, however, interpret the mission to mean that the CER has a literal role in the delivery of energy to Canadians and related activities.

Upon reviewing the CER's vision, more participants considered it achievable than not. The commitment to build relationships with Indigenous people garnered the most attention, followed by sustainability. A few participants also commented on the CER's challenge of balancing different interests.

The most common interpretation of the CER's trust and confidence priority has to do with transparency and the related concepts of openness and honesty. Other less often mentioned themes include doing what is best for Canadians and working to build trust and confidence with the public.

After reviewing the CER's competitiveness priority, several responses indicated that participants were not thinking about this as competitiveness stemming from a transparent and predictable regulatory process, although some did recognize this.

Participants provided a variety of interpretations as to what data and digital innovation means. Some responded that this reflected CER moving into the digital age. Others interpreted this function in relation to public engagement and increased transparency. Some participants also mentioned more readily available information about energy usage and related matters.

Participants interpreted the CER's Reconciliation priority as building or repairing relationships, respecting the land and water, and seeking permission. A few participants connected this to consultation and involvement in planning, while others mentioned education of staff.

The participants were also asked about their level of interest in learning more about each of the CER priorities and what specifically they wish to know more about. Those who are interested in trust and confidence want to learn how communications will be handled, who is involved in engagement and where, how the workforce will be empowered, and what steps are being taken to build relationships with Indigenous peoples. Participants also want to learn how the CER plans to implement this priority and what accountability measures will be in place.

In relation to the competitiveness priority, participants would like insight into the types of innovations being made, how CER will contribute to the transition to a low carbon economy, and what progress is being made. Other participants are interested in knowing if enough low carbon energy can be produced to meet domestic demand and if that can be done while keeping prices low.

In terms of data and digital innovation, participants expressed interest in the initiatives CER has implemented to improve digital innovation and access to data; what are CER's plans to encourage

people to engage; and how the information will be made easy for regular people to understand and access. Others are interested in what statistics and variables are being tracked and trended and how the CER plans to show Canadians and the world how Canada is leading in energy.

In response to the CER's Reconciliation priority, participants were interested in detail about how this will be approached, the processes, and plans as well as updates on progress and results. There is interest in how the views of Indigenous peoples will be taken into account, and in hearing Indigenous perspectives on how the CER has engaged with them. Others expressed interest in learning about the history of Indigenous peoples across Canada, their rights, and what the UN Declaration consists of.

In terms of format for the types of information requested, participants suggested a range of options including, videos, text-based information (simple bullet point sheet or PowerPoint), infographics, social media posts, websites and emails. Livestreaming of meetings or consultations was also suggested by a small number. Participants are seeking clarity and detail, but also want information that is easy to digest.

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

The Canada Energy Regulator (CER) is the country's federal energy regulator, overseeing 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 impacting 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 its third annual public opinion tracking study in early 2022. This study serves as a follow-up to studies conducted by Environics in 2020 and 2021. This study will help CER 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 continue to use feedback from this tracking study to inform improvements to its Communications Program and to ensure the program is fully aligned with the Government of Canada's Communications Policy.

3. About this report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the quantitative and qualitative results. A detailed description of the quantitative methodology is presented in Appendix A and the qualitative methodology is in Appendix C. The research instruments used to conduct this study are presented in Appendix B (quantitative) and D (qualitative).

Quantitative 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 the columns and rows in the quantitative results tables may not add to 100% due to rounding or multiple mentions. Base size is the total sample of n=1,008 unless otherwise specified.

Detailed findings – Quantitative research

Awareness of and familiarity with the CER

1. Unaided awareness of the CER

As in 2020 and 2021, eight in ten cannot name an organization responsible for the CER's mandate

Canadians were asked to name the Canadian organization responsible for the CER's mandate of overseeing oil and gas pipelines and electrical powerlines crossing a national, provincial, or territorial border. As in prior years, eight in ten are not able to name an organization with this mandate. Three per cent named the CER, consistent with the 2021 result. Unaided mentions of the NEB as the organization with this mandate also remain unchanged, at 2%. There is a range of other mentions, each cited by only small proportion.

Organization responsible for the CER's mandate – by region

| Named organization | 2020 Total (n=1 002) | 2021 Total (n=1 012) | 2022 Total (n=1 008) | Région | | | | | | |
|---|-------------------------|-------------------------|-------------------------|---------------|---------------|-----------------|---------------|---------------|---------------|-----------------|
| | | | | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
| NET: Canada Energy Regulator | 1 % | 3 % | 3 % | 3 % | 2 % | 2 % | 3 % | 2 % | 1 % | - |
| Canada Energy Regulator | 1 % | 2 % | 2 % | 3 % | 1 % | 1 % | 2 % | 2 % | 1 % | - |
| CER | - | 1 % | <1 % | - | 1 % | 1 % | - | - | - | - |
| Canadian Energy Regulator | <1 % | <1 % | <1 % | 1 % | 1 % | 1 % | <1 % | - | - | - |
| National Energy Board/NEB | 6 % | 2 % | 2 % | 3 % | 5 % | 1 % | 2 % | <1 % | - | 5 % |
| Pipeline (i.e. Trans Mountain) | 2 % | 2 % | <1 % | - | 2 % | - | <1 % | - | - | - |
| Hydro (incl. provincial) | 2 % | 2 % | 2 % | 4 % | 1 % | 2 % | 1 % | 5 % | 1 % | 1 % |
| Private companies (other) | 2 % | 2 % | <1 % | - | 1 % | - | - | - | 1 % | - |
| Federal government department (various) | 2 % | 2 % | 1 % | - | 1 % | - | - | - | - | <1 % |
| TransCanada/TCPL/TC Energy | 1 % | 1 % | 1 % | 2 % | 1 % | - | 1 % | - | - | <1 % |
| Commission/board (various) | 1 % | 1 % | 1 % | 2 % | 1 % | - | <1 % | - | 1 % | 1 % |

| | | | | | | | | | | |
|---------------------------|------|------|------|------|------|------|------|------|------|------|
| Other mentions (<1% each) | 3 % | 2 % | 4 % | 1 % | 4 % | 3 % | 6 % | 4 % | 2 % | 7 % |
| Don't know | 79 % | 81 % | 83 % | 81 % | 79 % | 88 % | 80 % | 87 % | 93 % | 86 % |

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 is generally similar across the country.

2. Aided awareness of the CER

Total awareness of the CER is slightly lower than in prior years. Roughly one in three Canadians express awareness (aided or unaided) of the CER.

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, one in three report having heard of it prior to the survey; six in ten have not. Total awareness ranges from a low of 26 per cent in the Atlantic region to a high of 50 per cent of Albertans. Total unaided and aided awareness is down slightly compared to prior years, as shown in the following table.

Total awareness of CER – by region

| Total awareness of the CER | 2020 Total (n=1,002) | 2021 Total (n=1,012) | 2022 Total (n=1,008) | Region | | | | | | |
|----------------------------|----------------------|----------------------|----------------------|------------|------------|--------------|------------|------------|------------|--------------|
| | | | | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
| Net: aware | 41% | 41% | 36% | 27% | 50% | 39% | 32% | 43% | 26% | 29% |
| Unaided awareness | 1% | 3% | 3% | 3% | 2% | 2% | 3% | 2% | 1% | - |
| Aided awareness | 40% | 38% | 33% | 23% | 48% | 37% | 29% | 41% | 25% | 29% |
| No awareness | 59% | 59% | 64% | 73% | 50% | 61% | 68% | 57% | 74% | 71% |

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=982)

Prompted awareness of the CER in this wave is lowest among those high school or less education (26%), and is higher among men (42%, vs. 25% of women), and those who later in the survey indicate they have recent awareness about energy projects (47%, vs. 26% who do not).

3. Aided awareness of the National Energy Board

Among those not aware of the CER, four in ten recall the NEB, similar to 2021.

Those who had not heard of the Canada Energy Regulator even after prompting (n=655) were asked if they had heard of it under its previous name, the National Energy Board or NEB. Four in ten recall the NEB, comparable to 2021. Awareness of the NEB (presented in the French version as the *l'Office national de l'énergie*) remains notably lower in Quebec (14%) than other regions (39% to 48%).

Aided awareness of the NEB among those not aware of the CER (n=655) – by region

| Heard of NEB before survey | 2020 Total (n=599) | 2021 Total (n=614) | 2022 Total (n=655) | Region | | | | | | |
|----------------------------|--------------------|--------------------|--------------------|------------|-----------|--------------|------------|------------|------------|-------------|
| | | | | BC (n=113) | AB (n=74) | MB/SK (n=58) | ON (n=143) | QC (n=121) | ATL (n=73) | TERR (n=73) |
| Yes, have heard of NEB | 45% | 39% | 38% | 39% | 42% | 46% | 48% | 14% | 43% | 45% |
| No, have not heard of NEB | 55% | 61% | 62% | 61% | 58% | 54% | 52% | 86% | 57% | 54% |

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=655)

Recall of the NEB is higher among Canadians aged 55 and older (59%) and is higher among men (53%, vs. 28% of women). Awareness of the NEB is also higher among those with a university education (45% vs. 32%-37%).

4. Familiarity with the CER

One in three who are aware of the CER say they are at least moderately familiar with it, similar to past results.

Those who had heard of the CER prior to the survey (n=353) were asked to indicate, using a scale of 1 to 10, how familiar they are with the organization. Over three in ten are at least somewhat familiar (33% scoring from 7 to 10), while slightly more are unfamiliar (38% scoring 1 to 4). Three in ten (29%) give a neutral response (5 or 6).

Familiarity with the CER among those who have heard of it (n=353)– by region

| Level of familiarity with CER | 2020 Total (n=403) | 2021 Total (n=398) | 2022 Total (n=353) | Region | | | | | | |
|-------------------------------|--------------------|--------------------|--------------------|-----------|-----------|---------------|-----------|-----------|-------------|--------------|
| | | | | BC (n=38) | AB (n=72) | MB/SK (n=36*) | ON (n=63) | QC (n=89) | ATL (n=26*) | TERR (n=29*) |
| Net: familiar (score 7-10) | 31% | 28% | 33% | 30% | 27% | 20% | 43% | 27% | 35% | 7% |
| Very familiar (score 9-10) | 8% | 6% | 5% | 5% | 2% | 6% | 5% | 6% | 15% | - |
| Somewhat familiar (score 7-8) | 23% | 22% | 27% | 25% | 26% | 14% | 38% | 21% | 20% | 7% |
| Neutral (score 5-6) | 33% | 27% | 29% | 44% | 35% | 32% | 25% | 27% | 23% | 11% |

| | | | | | | | | | | |
|---------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Net: not familiar (score 1-4) | 36% | 45% | 38% | 26% | 38% | 48% | 32% | 46% | 41% | 82% |
| Not very familiar (score 3-4) | 20% | 27% | 26% | 21% | 27% | 35% | 22% | 29% | 19% | 44% |
| Not at all familiar (score 1-2) | 16% | 18% | 12% | 5% | 11% | 14% | 9% | 17% | 22% | 38% |
| Mean | 5.2 | 4.9 | 5.2 | 5.5 | 5.0 | 4.7 | 5.6 | 4.9 | 5.2 | 3.3 |

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=353)

Being familiar with the CER is a minority position across the country and across population subgroups. Reported familiarity is somewhat higher in Ontario and among Canadians aged 18-34 (51%).

5. Familiarity with CER functions

Between one in three and four in ten among those who have heard of the CER are at least moderately familiar with each of its main functions; fewer than one in ten are very familiar.

Those indicating they are aware of the CER, aided or unaided (36%), were given information about four key functions and asked how familiar they are with each, using a ten-point familiarity scale. At least one in three indicate they are at least somewhat familiar (score 7 to 10) with each, while fewer than one in ten are very familiar (score 9 or 10).

Familiarity with CER functions - those aware of the CER (n=353)

| Function | Very familiar (9-10) | Somewhat familiar (7-8) | Neutral (5-6) | Not very familiar bien (3-4) | Not at all familiar (1-2) |
|----------------------------------|----------------------|-------------------------|---------------|------------------------------|---------------------------|
| Safety and Environment Oversight | 9% | 29% | 32% | 17% | 13% |
| Energy Information | 8% | 28% | 33% | 20% | 11% |
| Energy Adjudication | 8% | 33% | 28% | 21% | 11% |
| Engagement | 6% | 30% | 29% | 18% | 16% |

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."

BASE: Those with unaided or aided awareness of CER (n=353)

Among those aware of the CER, reported familiarity with its main functions is higher than in past years.

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

| Net familiar (score 7-10) | 2020 Total (n=403) | 2021 Total (n=398) | 2022 Total (n=353) | Region | | | | | | |
|--------------------------------|--------------------|--------------------|--------------------|-----------|-----------|---------------|-----------|-----------|-------------|--------------|
| | | | | BC (n=38) | AB (n=72) | MB/SK (n=36*) | ON (n=63) | QC (n=89) | ATL (n=26*) | TERR (n=29*) |
| Safety & Environment Oversight | 33% | 27% | 38% | 40% | 33% | 25% | 40% | 40% | 43% | 15% |
| Energy Information | 29% | 26% | 36% | 34% | 30% | 25% | 37% | 42% | 35% | 6% |
| Energy Adjudication | 33% | 26% | 40% | 40% | 30% | 29% | 46% | 42% | 38% | 15% |
| Engagement | 31% | 24% | 36% | 40% | 31% | 28% | 38% | 38% | 36% | 7% |

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=353)

Reported familiarity with most of these functions decreases with age and is somewhat higher among those who are university educated, and those who indicate they are at least somewhat familiar with the CER in general.

Interest in learning about the CER

1. Overall interest in learning about the CER

Nearly seven in ten are at least somewhat interested in learning more about the CER's work, although fewer than one in five are very interested.

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. Interest levels are similar to prior years, with just under seven in ten saying they are at least somewhat interested in learning more. Overall interest ranges from a low of 55 per cent in the North to a high of 74 per cent in Quebec.

Interest in knowing more about the CER – by region

| Interest in knowing more about the CER | 2020 Total (n=1,002) | 2021 Total (n=1,012) | 2022 Total (n=1,008) | Region | | | | | | |
|--|----------------------|----------------------|----------------------|------------|------------|--------------|------------|------------|------------|--------------|
| | | | | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
| NET: Interested | 73% | 69% | 67 % | 63 % | 68 % | 58 % | 68 % | 74 % | 60 % | 55 % |
| Very interested | 20% | 16% | 16 % | 16 % | 18 % | 13 % | 15 % | 21 % | 11 % | 23 % |
| Somewhat interested | 53% | 53% | 51% | 47% | 51% | 45% | 54% | 52% | 49% | 32% |
| NET: Not interested | 27% | 31% | 33% | 37% | 32% | 42% | 32% | 26% | 40% | 41% |
| Not very interested | 20% | 24% | 23% | 28% | 22% | 35% | 22% | 19% | 28% | 26% |
| Not at all interested | 7% | 7% | 9% | 9% | 9% | 7% | 10% | 7% | 11% | 15% |
| Don't know/Refused | <1% | <1% | <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 higher among men (75%) compared to women (60%) and somewhat higher among younger Canadians aged 18-34 (73%), and university graduates (73%). Interest in learning more is also higher among those who are already aware of the CER (86%), and those with recent awareness of energy projects (79%). Interest in learning more is highest among those familiar to some extent with the CER (96%) and decreases as familiarity decreases (to 79% not familiar).

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

More than half are at least somewhat interested in each of the four aspects of the CER's work, with safety and environment oversight garnering the most interest.

Canadians were asked how interested they would be in learning more about the CER's work. More than half are somewhat or very interested in learning more about each of the four main aspects. Just under seven in ten express interest in knowing more about safety and environmental oversight; two in three would be interested in learning about energy information. As in past years, Canadians express somewhat less interest in either energy adjudication or engagement activities. Strong interest follows the same pattern, with one in five being very interested (score 9 or 10) in hearing more about safety and environmental oversight. Net interest in safety and environment oversight and energy adjudication is somewhat higher in Quebec compared to other provinces.

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

| Interest in knowing more about aspects of CER's work | 2020 Total (n=1 002) | 2021 Total (n=1 012) | 2022 Total (n=1 008) | Region | | | | | | |
|--|----------------------|----------------------|----------------------|------------|------------|--------------|------------|------------|------------|--------------|
| | | | | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
| Safety and environment oversight | | | | | | | | | | |
| Net: Interested | 74% | 73% | 69% | 69% | 64% | 64% | 68% | 75% | 65% | 58% |
| Very interested | 28% | 24% | 21% | 22% | 21% | 13% | 20% | 27% | 16% | 22% |
| Energy information | | | | | | | | | | |
| Net: Interested | 69% | 69% | 65% | 58% | 69% | 61% | 67% | 66% | 62% | 57% |
| Very interested | 22% | 19% | 17% | 11% | 17% | 15% | 17% | 23% | 9% | 24% |
| Energy adjudication or reviewing applications | | | | | | | | | | |
| Net: Interested | 66% | 62% | 61% | 58% | 60% | 55% | 60% | 68% | 55% | 57% |
| Very interested | 18% | 14% | 15% | 15% | 11% | 11% | 16% | 12% | 12% | 26% |
| Engagement activities | | | | | | | | | | |
| Net: Interested | 62% | 59% | 56% | 58% | 58% | 46% | 58% | 57% | 51% | 57% |
| Very interested | 16% | 13% | 13% | 15% | 13% | 14% | 10% | 17% | 13% | 22% |

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

Interest in CER activities varies across population subgroups. Men express greater interest than women in all areas, as do university graduates. Canadians aged 18 to 34 are the most interested in hearing about engagement activities (65%, vs. 53% of others).

Canadians with household incomes between \$80,000 and \$100,000 (82%) are more interested in safety and environment oversight, energy adjudication, and engagement activities. In all cases, interest is higher among those aware of the CER prior to the survey, those who are more familiar with it, and those with recent awareness of pipeline or powerline projects.

Confidence in and perceptions of the CER

1. Confidence in the CER

Similar to prior years, Canadians are most likely to be confident the CER ensures compliance, protects public safety, and makes data-driven decisions.

Canadians were shown eight statements about the CER and asked to indicate their level of confidence regarding each, using a ten-point scale. Overall confidence (scoring 7 to 10) is consistent with prior years. Four in ten or more are at least somewhat confident in three of the statements: that the CER ensures compliance, that it makes decisions that ensure public safety, and that its decisions are based on scientific evidence. Just under four in ten agree to some extent with three other statements; Canadians are least likely to agree the CER's decisions advance Reconciliation with Indigenous Peoples or contribute to an inclusive society.

Confidence in aspects of the CER's work

| The CER ('s)... | 2020 Net: confident (7-10) | 2021 Net: confident (7-10) | 2022 Net: confident (7-10) | Very confident (9-10) | Somewhat confident (7-8) | Neutral (5-6) | Not very/ not at all confident (1-4) |
|---|----------------------------------|----------------------------------|----------------------------------|-----------------------------|--------------------------------|------------------|---|
| ...ensures pipeline/powerline companies comply with relevant rules/regulations | 45% | 45% | 45% | 12% | 33% | 34% | 20% |
| ...makes decisions that effectively ensure public safety | 43% | 44% | 45% | 12% | 33% | 35% | 20% |
| ...decisions are based on the best available scientific information and data | 43% | 41% | 43% | 10% | 33% | 36% | 21% |
| ...decisions enhance Canada's global competitiveness | 41% | 36% | 38% | 9% | 29% | 39% | 23% |
| ...makes decisions that effectively protect the environment | 38% | 37% | 37% | 8% | 29% | 37% | 25% |
| ...makes decisions in the public interest, for energy projects like new pipelines and power lines | 38% | 35% | 37% | 8% | 28% | 37% | 26% |
| ...decisions contribute to an inclusive society | 35% | 31% | 33% | 8% | 25% | 42% | 25% |
| ...decisions advance Reconciliation with Indigenous peoples* | 31% | 29% | 30% | 8% | 22% | 41% | 29% |

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 2020 survey field period occurred during the Wet'suwet'en First Nation pipeline demonstrations across the country.

Confidence is similar across subgroups, with no distinct patterns by gender, age, or education. Confidence in aspects of the CER's work is comparable across the regions of the country, as shown in the table below. Indigenous people are more confident than others that the CER's decisions advance Reconciliation (59% 7-10 vs. 29% for non-Indigenous persons).

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

| Confidence | 2022 Total (n=1,008) | Region | | | | | | |
|---|-------------------------|---------------|---------------|-----------------|---------------|---------------|---------------|-----------------|
| | | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
| The CER ensures pipeline and powerline companies comply with the relevant rules and regulations | | | | | | | | |
| Net: Confident (score 7-10) | 45% | 44% | 43% | 51% | 44% | 47% | 48% | 40% |
| Very confident (score 9-10) | 12% | 12% | 9% | 16% | 13% | 10% | 20% | 15% |
| The CER's decisions enhance Canada's global competitiveness | | | | | | | | |
| Net: Confident (score 7-10) | 38% | 41% | 31% | 41% | 35% | 44% | 38% | 26% |
| Very confident (score 9-10) | 9% | 11% | 5% | 10% | 8% | 11% | 13% | 10% |
| The CER makes decisions that effectively ensure public safety | | | | | | | | |
| Net: Confident (score 7-10) | 45% | 46% | 40% | 50% | 43% | 49% | 47% | 32% |
| Very confident (score 9-10) | 12% | 13% | 10% | 15% | 12% | 11% | 17% | 15% |
| The CER's decisions are based on the best available scientific information and data | | | | | | | | |
| Net: Confident (score 7-10) | 43% | 41% | 39% | 43% | 43% | 45% | 44% | 33% |
| Very confident (score 9-10) | 10% | 10% | 6% | 8% | 11% | 8% | 16% | 15% |
| The CER makes decisions that effectively protect the environment | | | | | | | | |
| Net: Confident (score 7-10) | 37% | 34% | 36% | 36% | 41% | 36% | 32% | 20% |
| Very confident (score 9-10) | 8% | 9% | 6% | 7% | 7% | 9% | 14% | 17% |
| The CER makes decisions in the public interest, for energy projects like new pipelines and power lines | | | | | | | | |
| Net: Confident (score 7-10) | 37% | 36% | 36% | 35% | 36% | 41% | 35% | 22% |
| Very confident (score 9-10) | 8% | 8% | 3% | 6% | 10% | 10% | 9% | 8% |
| The CER's decisions contribute to an inclusive society | | | | | | | | |
| Net: Confident (score 7-10) | 33% | 32% | 25% | 39% | 30% | 42% | 31% | 25% |
| Very confident (score 9-10) | 8% | 9% | 7% | 8% | 9% | 8% | 9% | 5% |
| The CER's decisions advance Reconciliation with Indigenous Peoples | | | | | | | | |
| Net: Confident (score 7-10) | 30% | 31% | 25% | 33% | 27% | 36% | 35% | 21% |
| Very confident (score 9-10) | 8% | 9% | 4% | 7% | 7% | 11% | 9% | 6% |

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 you are for each of the following?

2. Overall confidence in the CER

Four in ten Canadians are at least somewhat confident in the CER; one in ten are very confident.

Canadians were asked to indicate their overall confidence in the CER, using a ten-point scale. Just over four in ten say they are at least somewhat confidence in the CER (7-10 rating), while one in ten are very confident (9-10 rating). Net confidence ranges from a low of 33 per cent in the North to a high of 48 per cent in Quebec.

Overall confidence in the CER

| Level of confidence in the CER | 2021 Total (n=1012) | 2022 Total (n=1 008) | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
|--------------------------------|---------------------|----------------------|------------|------------|--------------|------------|------------|------------|--------------|
| Net: Confident (7-10) | 43% | 45% | 43% | 38% | 41% | 46% | 48% | 44% | 33% |
| Very confident (9-10) | 10% | 9% | 9% | 4% | 7% | 9% | 11% | 12% | 10% |
| Somewhat confident (7-8) | 33% | 36% | 34% | 33% | 34% | 37% | 37% | 32% | 23% |
| Neutral (5-6) | 39% | 41% | 37% | 44% | 37% | 42% | 38% | 43% | 37% |
| Net: Not confident (1-4) | 17% | 15% | 20% | 18% | 23% | 12% | 14% | 12% | 23% |
| Not very confident (3-4) | 10% | 8% | 12% | 11% | 12% | 5% | 8% | 8% | 8% |
| Not at all confident (1-2) | 8% | 7% | 8% | 7% | 11% | 8% | 7% | 4% | 15% |

Q21A Overall, how confident are you in the Canada Energy Regulator or CER?

Overall confidence is comparable across, age, income and education levels. Men express somewhat more confidence than women (48% vs. 41%). Net confidence (rating 7 – 10) is higher among those who said they are familiar with the CER (82%).

When asked why they gave the confidence ratings they did, around one in seven (13%) say it is because they have generally positive perceptions of the CER – that the CER is doing a good job and has a good reputation. The same proportion (13%) are confident in the CER due to its mandate covering important topics, like ensuring compliance, ensuring human safety, and making decisions in the public interest. About one in ten (11%) mention having trust in government/regulation in general.

Fewer than one in ten Canadians (8%) indicate their rating is due to the CER having biases that decrease their confidence in the organization, for example, being biased towards industry or lacking independence. Just under one in ten mention negative mandate related issues, including allowing environmental damage and not respecting Indigenous rights. Small proportions mention negative impressions in general, or a lack of transparency. Four in ten did not have a specific reason why they gave their confidence rating.

Details of reasons for overall confidence in the CER are shown in the table on the next page.

Reasons for overall confidence in the CER

| Reason | 2021 Total (n=1 012) | 2022 Total (n=1 008) | BC (n=151) | AB (n=146) | MB/SK (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
|---|-------------------------|-------------------------|---------------|---------------|-----------------|---------------|---------------|---------------|-----------------|
| Net: General Positive | 16% | 13% | 12% | 11% | 7% | 10% | 18% | 8% | 8% |
| Good/good job/ competent/ trustworthy/professi onal/ reliable | 12% | 8% | 7% | 6% | 5% | 8% | 11% | 6% | 8% |
| Positive news/ word of mouth/ reputation | 3% | 5% | 5% | 5% | 2% | 2% | 7% | 2% | - |
| Net: Mandate related positive | 12% | 13% | 10% | 11% | 12% | 14% | 15% | 13% | 24% |
| Decisions in the public interest | 4% | 5% | 4% | 5% | 5% | 6% | 3% | 9% | 3% |
| Protects the environment | 3% | 2% | 2% | 2% | 1% | 1% | 3% | - | 6% |
| Accountable/follow s mandate | 3% | 2% | 2% | 2% | 2% | 2% | 3% | - | 5% |
| Enforces regulations/ensure s compliance | 1% | 2% | 1% | 1% | 2% | 3% | 3% | 2% | 9% |
| Ensures human safety | 1% | 2% | 1% | 1% | 2% | 2% | 3% | 2% | 1% |
| Net: Trust/pride | 3% | 11% | 14% | 10% | 8% | 11% | 12% | 8% | 16% |
| I trust govt/ regulators | 2% | 9% | 10% | 7% | 6% | 10% | 8% | 7% | 16% |
| Canadian, therefore good | 1% | 2% | 4% | 3% | 2% | 1% | 4% | 1% | - |
| Net: Biases | 11% | 8% | 8% | 13% | 13% | 6% | 8% | 11% | 10% |
| Biased toward industry | 5% | 3% | 3% | 4% | 4% | 2% | 4% | 4% | 5% |
| Not independent/politici zed | 5% | 5% | 3% | 9% | 9% | 4% | 4% | 7% | 5% |
| Net: Mandate related negative | 7% | 7% | 9% | 8% | 12% | 6% | 8% | 5% | 11% |
| Allows environmental damage | 4% | 4% | 4% | 4% | 6% | 3% | 6% | 3% | 4% |
| Doesn't protect public safety | - | 1% | 2% | 1% | 2% | - | 1% | 1% | 1% |
| Not advancing Reconciliation with Indigenous people | 2% | 2% | 3% | 3% | 4% | 3% | 1% | 1% | 6% |
| Bad press / word of mouth / reputation | 2% | 2% | 1% | - | - | <1% | 2% | 1% | - |
| Lacks transparency | 2% | 2% | 2% | 2% | 2% | 2% | - | 3% | 2% |
| Decisions not good /inclusive | 1% | 2% | 5% | 3% | 4% | 1% | 1% | - | - |
| Distrust government/ regulators | 2% | 5% | 5% | 2% | 3% | 6% | 2% | 6% | 5% |
| Too bureaucratic/ Ineffective/ slow/"govt" organization | 2% | 2% | 1% | 2% | 1% | 2% | 1% | 1% | - |
| DK/NA/no specific reason | 44% | 45% | 48% | 46% | 45% | 45% | 42% | 45% | 47% |

Q21B Why do you say that?

3. Perceptions of the CER

Similar to past results, 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 five terms describe the CER. Consistent with past results, six in ten or more say the attributes at least somewhat describes the organization, and they are most likely (76%) to think that “Expert” at least somewhat describes the CER. Perceptions that the CER is fair, timely and transparent are also consistent with the previous research. Two in three perceive the CER as inclusive, similar to last year.

Opinions are generally similar across regions, but residents of Quebec are among the most likely to say each of the attributes fully describes the CER.

Extent to which terms describe the CER – by region

| Term describes the CER | 2020 Total (n=1,002) | 2021 Total (n=1,012) | 2022 Total (n=1,008) | Region | | | | | | |
|---|----------------------|----------------------|----------------------|------------|------------|---------------|------------|------------|------------|--------------|
| | | | | BC (n=151) | AB (n=146) | MB/S K (n=94) | ON (n=206) | QC (n=210) | ATL (n=99) | TERR (n=102) |
| Expert | | | | | | | | | | |
| Net: Describes | 78% | 77% | 76% | 70% | 73% | 67% | 74% | 85% | 83% | 67% |
| Fully describes | 21% | 20% | 17% | 13% | 16% | 13% | 14% | 27% | 16% | 8% |
| Fair | | | | | | | | | | |
| Net: Describes | 69% | 68% | 69% | 64% | 65% | 68% | 71% | 69% | 73% | 56% |
| Fully describes | 11% | 12% | 12% | 12% | 13% | 10% | 9% | 17% | 12% | 7% |
| Timely | | | | | | | | | | |
| Net: Describes | 64% | 64% | 63% | 58% | 50% | 59% | 63% | 71% | 68% | 44% |
| Fully describes | 10% | 9% | 10% | 9% | 5% | 6% | 10% | 17% | 7% | 10% |
| Inclusive* | | | | | | | | | | |
| Net: Describes | s.o. | 64% | 65% | 60% | 61% | 60% | 63% | 73% | 69% | 57% |
| Fully describes | s.o. | 10% | 11% | 11% | 9% | 10% | 10% | 15% | 7% | 17% |
| Open and transparent to the public | | | | | | | | | | |
| Net: Describes | 61% | 60% | 59% | 54% | 54% | 50% | 59% | 66% | 64% | 45% |
| Fully describes | 11% | 10% | 10% | 12% | 10% | 6% | 7% | 16% | 7% | 8% |

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

NOTE: The attribute “Inclusive” was added to survey in 2021.

This year there are no clear patterns in these results by income level age or gender. Similar to last year, saying each term fully describes the CER is highest among those reporting familiarity with the organization.

Pipeline/powerline information/awareness

1. Awareness of recent pipeline/powerline projects in Canada

About one in three are aware of recent pipeline or powerline projects in Canada, down substantially.

Canadians were asked if they had seen, heard or read anything recently about proposed or existing pipelines or powerline projects in the country. One in three say they had, down substantially from 2021 and 2020 levels.¹ Awareness levels are generally similar across the country, with Quebec below average and the Territories above.

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

| Have seen/heard/read anything recently | 2020 Total (n=1,002) | 2021 Total (n=1,012) | 2022 Total (n=1,008) | Region | | | | | | |
|--|----------------------|----------------------|----------------------|------------|------------|--------------|-------------|------------|-------------|--------------|
| | | | | BC (n=151) | AB (n=146) | MB/SK (n=94) | ONT (n=201) | QC (n=201) | ATL (n=104) | TERR (n=102) |
| Yes (have recent awareness) | 62% | 58% | 34% | 35% | 38% | 36% | 38% | 23% | 30% | 51% |
| No (no recent awareness) | 38% | 42% | 66% | 65% | 62% | 64% | 62% | 77% | 70% | 49% |

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

As in prior years, awareness of recent pipeline and powerline projects is higher among those age 55 and over (45%) and (related to age) retired people (44%). It is higher among men (42% vs. 25% of women) and those who had heard of the CER prior to the survey (47%) than those who had not (27%).

¹ Note that the 2020 survey field period occurred during the Wet'suwet'en First Nation pipeline demonstrations in British Columbia and solidarity protests elsewhere, which received national media attention. In 2021, the fieldwork took place not long after the Biden administration in the U.S. cancelled the Keystone XL project, which received international media attention.

2. Where Canadians heard/saw recent energy project information

Canadians are most likely to have seen or heard about pipeline/powerline projects on TV, followed at some distance by major daily newspapers, radio and social media.

Those who indicated they had recent awareness of pipelines or powerlines information (n=353) were asked where they had seen or heard this. In the online survey they were presented with a list of options and were given an option to provide additional sources. On the telephone, residents of the Territories were read a couple of examples. Multiple responses were permitted.

Consistent with prior years television is by far the top response, mentioned by three-quarters. Three in ten report seeing this information in a major newspaper, and one in five for radio and social media.

Where saw/heard recent project energy information– by region

| Where saw/heard energy project information | 2020 Total (n=635) | 2021 Total (n=598) | 2022 Total (n=353) | Region | | | | | | |
|--|--------------------|--------------------|--------------------|-----------|-----------|--------------|-----------|-----------|------------|-------------|
| | | | | BC (n=52) | AB (n=55) | MB/SK (n=34) | ON (n=79) | QC (n=48) | ATL (n=30) | TERR (n=55) |
| On TV | 70% | 72% | 76% | 77% | 64% | 59% | 81% | 85% | 67% | 43% |
| Social media (general) | 31% | 2% | 21% | 21% | 24% | 26% | 19% | 20% | 17% | 7% |
| On radio | 29% | 21% | 23% | 19% | 24% | 21% | 19% | 34% | 35% | 12% |
| On a website | 28% | 23% | 16% | 17% | 22% | 12% | 15% | 13% | 22% | 22% |
| Major city or national (daily) newspaper | 25% | 25% | 29% | 25% | 25% | 24% | 33% | 32% | 27% | 3% |
| Word of mouth | 20% | 14% | 13% | 13% | 15% | 11% | 13% | 9% | 21% | 15% |
| Local community/weekly newspaper | 17% | 11% | 9% | 18% | 17% | 15% | 4% | 6% | 11% | 10% |
| Other | <1% | 1% | 1% | 2% | - | 3% | 1% | - | - | 18% |
| I don't recall / DK/NA | <1% | <1% | <1% | - | - | - | - | - | - | 2% |

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=353)

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

Responses are generally quite similar across the country and population subgroups. Saying television was the source is higher among Canadians aged 55+ (90%) and those who are retired (90%). Younger Canadians aged 18 to 34 are the most likely to mention social media (40% vs. 14% those aged 55+), websites (33% vs. 11% those aged 55+) and radio (40% vs. 17% those aged 55+). Seeing related information in a major newspaper is highest among those with a university degree (38%) and those with incomes over \$100,000 (40%).

3. Source of recent energy project information

Canadians are most likely to say the government was the source of the recent information they heard about pipelines/powerlines; one in six specifically name the Canada Energy Regulator.

Those who had recent awareness of pipelines or powerlines information (n=353) 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, now by nearly half (46%), followed by environmental groups (35%) and energy companies (26%). One in six say the information came from the CER, up slightly from 2021 and comparable to 2020. The same proportion named 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 | 2020 Total (n=635) | 2021 Total (n=598) | 2022 Total (n=353) | Region | | | | | | |
|-----------------------------|--------------------|--------------------|--------------------|-----------|-----------|---------------------------|-----------|------------------------|-------------------------|-------------|
| | | | | BC (n=52) | AB (n=55) | MB/SK (n=34) [*] | ON (n=79) | QC (n=48) [*] | ATL (n=30) [*] | TERR (n=55) |
| Government | 52% | 58% | 46% | 54% | 50% | 49% | 41% | 42% | 63% | 10% |
| Environmental groups | 41% | 21% | 35% | 51% | 20% | 29% | 37% | 40% | 20% | 4% |
| Energy companies | 24% | 21% | 26% | 35% | 32% | 27% | 23% | 25% | 20% | 2% |
| Canada Energy Regulator/CER | 19% | 11% | 16% | 14% | 24% | 13% | 14% | 15% | 20% | 2% |
| Industry groups | 16% | 13% | 16% | 23% | 25% | 14% | 15% | 9% | 7% | 10% |
| News reports (various) | 8% | 9% | 5% | 4% | 2% | 7% | 9% | - | 3% | 1% |
| Indigenous groups | 2% | <1% | 1% | 2% | 2% | 3% | 1% | - | - | - |
| Word of mouth | <1% | <1% | <1% | 2% | - | - | - | - | 4% | <1% |
| Other | <1% | 1% | 2% | - | 3% | - | 3% | - | - | 16% |
| I don't recall / DK/NA | 6% | 5% | 5% | 4% | 4% | - | 5% | 6% | 6% | 45% |

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=353)

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

Responses are generally similar across Canada and most subgroups. Similar to prior years, BC residents are the most likely to indicate the source was environmental groups. Saying the information came from the CER is highest among those aged 18 to 34 (33%). Residents of the North are the most likely to mention media reports (12%), CBC News (4%) or to say they do not recall the source (45%).

Driver analysis: understanding overall confidence in the CER

Environics conducted a driver analysis to provide insight into which factors have the largest influence on overall confidence in the CER. The key driver analysis uses overall confidence in the CER (Q21A) as the dependent variable; meaning the analysis determines the main drivers of confidence in the CER.

The analysis reveals that beliefs about the CER's decisions and their impacts are the dominant driver; perceptions of the organization in terms of its attributes make up a second tier.

| Key Driver Analysis | | |
|----------------------------|---|---|
| Tier of Driver | Drivers | Impact on Overall Confidence in the CER (%) |
| 1st Tier | Belief in CER's decision making | 68% |
| Factors | The CER makes decisions in the public interest | 12% |
| | The CER makes decisions that effectively ensure public safety | 9% |
| | The CER's decisions are based on the best available scientific information and data | 9% |
| | The CER makes decisions that effectively protect the environment | 8% |
| | The CER ensures compliance with relevant rules and regulations | 7% |
| | The CER's decisions contribute to an inclusive society | 7% |
| | The CER's decisions advance Reconciliation with Indigenous Peoples | 7% |
| | The CER's decisions enhance Canada's global competitiveness | 7% |
| 2nd Tier | CER Attributes | 26% |
| Factors | Fair | 6% |
| | Open and transparent | 5% |
| | Expert | 5% |
| | Inclusive | 4% |
| | Timely | 4% |
| 3 rd Tier | Interest in learning more | 5% |
| | Familiarity/awareness | 1% |

Two-thirds of the variance in Canadian's overall level of confidence in the CER is impacted by their beliefs about its decision making. Views about the CER's attributes drive 26 per cent of confidence.

Interest in learning more, familiarity with the CER and awareness of recent energy projects together drive six per cent of confidence in the CER, making them third-tier drivers.

Detailed findings – Qualitative research

I. Qualitative participant profile

The bulletin board community was active for two days and received a total of 113 participants, including 88 participants in the English community and 25 participants in the French community. The participants come from across the country and include a good mix by age, gender, education and employment status.

The qualitative participants were recruited from among the quantitative survey respondents. Only those who expressed at least some interest in learning more about the CER were invited for the qualitative research.

A detailed participant profile is presented in Appendix C of this report.

Energy in your life

On the first day of the online community, participants were asked about their connection to the CER and its mandate. Responses largely reflect little or no involvement in the sector, beyond being consumers. A couple mention indirect work connections or past involvement in the sector.

Most cannot recall being affected by energy infrastructure other than a few mentions of power outages or power lines going down – often due to falling branches or trees. A few participants mentioned living in close proximity to energy infrastructure or knowing friends and relatives who work in the industries.

Several participants mentioned being aware of, or following, protests against new pipelines.

“I have watched it in the news several times, including watching the protests against the pipelines in the West during Feb/March 2021.”

Several participants indicated their hope or preference for a transition to renewable energy sources.

“I would love for it to be more green: more wind/solar/water powered, less burning of fossil fuels/coal/etc.”

A few also mentioned having investments in energy companies or speculated about energy prices going forward, while others noted that their home energy costs have been higher than usual lately.

Understanding of the CER

Participants were shown the mission of the Canada Energy Regulator and asked to describe in their own words what it means to them and/or what they think the CER does.

Regulating infrastructure to ensure safe and efficient delivery of energy to Canada and the world, protecting the environment, recognizing and respecting the rights of the Indigenous peoples of Canada, and providing timely and relevant energy information and analysis.

The responses indicate that some participants understand the intent of the CER mission, describing it as regulating industry, while respecting the environment and Indigenous communities, and ensuring safety.

“CER regulates energy infrastructure projects.”

“The CER protects the environment as well as the people. They provide the rules and regulations for pipelines of how and when they are built. They create a standard that everyone must obtain so that there is no faulty work.”

“CER is a like a watch dog that oversees the safety aspects, the environmental aspects and the rights of the owners of the land (the Indigenous people of Canada). They operate independently without bias and develop plans, gather information to make decisions from their analysis.”

Other respondents, however, interpret the mission to mean that the CER has a literal role in the delivery of energy to Canadians, in building and selling pipelines, making sure people receive energy, and keeping homes heated at fair prices.

“I think this means the CER makes sure everyone has access to oil and gas if they need it.”

“I think the main role of CER is to ensure that Canadians have access to clean and efficient energy resources. CER looks for ways to reduce waste and promote safe Canadian resources around the world.”

“Makes sure Canadians can get the energy they need, when they need it, safely and with respect.”

“I would think that this means that they are a safety net for Canadians. They work on ensuring that prices aren't gouged and that we as the consumers get the right prices. They also ensure that there is enough energy use for all of us.”

Others still are sceptical or distrusting of the CER or parts of the mission.

“I feel the CER does everything it can to avoid meeting the responsibilities listed above. In the end, corporations always pay government to bend to their wishes and developments.”

“I believe that CER deters resource exploration.”

Next, participants were shown the CER's vision and asked what it means to them and how likely they think the CER will achieve its vision.

An energy regulator with an exemplary workforce that has the confidence of Canadians; is dedicated to ensuring safety and environmental sustainability; builds strong relationships with First Nations, the Métis, and the Inuit; and enhances Canada's global competitiveness.

A range of responses were received and more participants indicate feeling that the vision is achievable than not, although many did not comment on this part of the question focusing instead on what the vision means to them.

The commitment to build relationships with Indigenous people was most often noted, followed by sustainability with reflections of both support and doubt.

“Works with native peoples on their territories and land claims where pipeline infrastructure is developed and developing.”

“I am happy to hear that the relationship is being formed with First Nations People.”

“To me the focus on working on the land of their rightful people with their permission. I think the vision will be achieved by getting consent of Indigenous peoples in all actions & being transparent about it.”

“Again, it's good that it is preaching for environmental sustainability and respecting Indigenous peoples, but I don't really see that happening and it seems like it is just being said because it's expected/is a good thing to say. There needs to be action behind these words.”

“To me, this means providing quality service and contributing to a strong economy while prioritizing on sustainability and not causing harm to the environment.”

“This means a shift away from oil & gas, towards solar energy, wind power, and hydro power. As things are now, it seems unlikely. I think it's possible, but CER isn't on the right track yet.”

A few participants focused on the CER's commitment to Canadians.

“It means that besides being committed to delivering safe and reliable energy to Canadians, they are also respectful of all Canadians as well. Working together helps everyone.”

“To me that means that they are committed to measures for Canadians to stay safe and they respect everyone while doing their jobs. Doing this will make Canada stand out as a global competitor.”

“The CER has the highest standards and is committed to serve all of us. They provide this by having strict guidelines, rules and regulations.”

Several participants commented on the CER's challenge of balancing different interests.

“It will be very challenging task to satisfy needs and expectations of all different groups. It's important to have something like this in place.”

“I would say that this is a difficult mission whereas there are so many relationships to interact with and not all are on the same page regarding needs and expectations.”

There were also mentions of the CER workforce, although this was quite infrequent.

“This means to me that they have a highly skilled workforce who know what they are doing and work towards offering their services while simultaneously ensuring safety and environmental sustainability.”

“This means it has competent people working for them and they have the trust of all Canadians that they will do their jobs properly.”

“Best of people working for the sector, while building a good relationship with Indigenous communities.”

There are also a few responses that indicate scepticism or cynicism.

“Trying to be all things to all people, a hard thing to do.”

“I don’t get involved with “this group” and “that group” trash politics. We are all Canadians here.”

“The CER has proven that they are not dedicated to achieving this vision, whatsoever. They do not care for environmental sustainability and continue to destroy relationships with Indigenous peoples (and during a time where our country should be mourning from the news of residential schools.)”

CER priorities

Participants were asked to interpret the meaning of the CER’s four main priorities by describing them in their own words, rating the importance of each responsibility on a ten-point scale and providing the rationale for their ratings.

1. Trust and confidence

Trust and Confidence. Fostering trust and confidence of Canadians in the CER through robust communications, transparency, collaboration and inclusive engagement; building respectful relationships with the Indigenous peoples of Canada; and fostering an engaged and empowered workforce.

The most common interpretation of the CER’s trust and confidence priority has to do with transparency and the related concepts of openness and honesty.

“Transparency in what it says and does.”

“Honest information, Not biased, Respect, available to all Canadians.”

“To me it means the CER is upfront and honest with the work they do in the way they communicate with the public. They build trust that way and I think it’s great...”

“Transparency in their actions and communications.”

Other less often mentioned themes include doing what is best for Canadians, and working to build trust and confidence with the public.

“Any organization, and especially a regulator needs to have the trust and confidence of the citizens. The regulator is trying to have lots of communication with the public, involving them when it comes to making decisions.”

“It means they are supposed to do what is best for Canadians.”

A few participants expressed doubts.

“It means being a partner and ally with Indigenous peoples, but this is a big priority and requires more than just words.”

“Another term that sounds good, but I'm not sure in practice what it means.”

On average, participants rated the importance of trust and confidence as 9.05 out of ten. Roughly three in four provided a rating 9 or 10, with forty per cent rating this a ten, indicating they believe it is a very important priority of the CER.

“It helps build a productive and mutually understanding relationship.”

“I think trust and confidence are absolutely necessary goals for the regulator, as without those, it'll be inevitable that all their decisions will be questioned by everyone all the time...”

As the quotes indicate, participants think trust and confidence is important because it provides legitimacy for the organization and its decisions.

2. Competitiveness

Competitiveness: Enhancing Canada's global competitiveness by improving transparency, predictability and efficiency throughout the regulatory lifecycle, while driving innovation that contributes to the transition to a low carbon economy.

The bulk of responses here suggest that participants were not thinking about this as competitiveness stemming from a transparent and predictable regulatory process.

“Competitiveness in the energy sector means innovating and investing in renewable energy, utilizing our resources (wind, water, solar) to be global leaders in sustainable energy.”

“I hope that this means they wish to be competitive against other nations in terms of how well those nations are succeeding in practicing the aim to uphold environmental sustainability, reversal of climate change, and accessibility, alongside being reliable and affordable.”

“It means that we have great prices that are better than competitors, so people in global markets will want to buy from us.”

“Ensuring energy infrastructure is routinely updated with newer technologies. In order to maintain costs remaining competitive.”

A couple of participants did mention the regulatory aspect.

“The regulator would like to show the world that Canada has a transparent, predictable and efficient process for getting energy infrastructure built.”

“We need to be able to compete globally by providing a product that is efficient, well-regulated and well respected in global markets while at the same time helping Canadian progress.”
(Emphasis added).

On average, participants rated the importance of competitiveness as 8.2 out of ten. Nearly six in ten rated it a nine or ten, indicating they consider this of moderate importance, below trust and confidence.

The rationales for these ratings reflect the range of interpretations. Among those who noted the importance of regulatory efficiency, the rationales focus on the importance of balancing regulation with other objectives.

“We can regulate ourselves into nonexistence if we’re not careful.”

“Otherwise industry will go elsewhere.”

“We need to become the most environmentally friendly energy producer in the world.”

3. Data and digital innovation

Creating a data and digital innovation culture and systems that enable the effective delivery of the CER’s mandate; allow for improved public access, use and analysis of accurate data and energy information for meaningful participation and informed decision-making; and enhance opportunities for digital engagement.

Participants provided a variety of interpretations as to what data and digital innovation means. Some responded that this reflected CER moving into the digital age.

“Moving CER into a digital and data age that will allow the public to share their thoughts.”

“I want to say it means that their using cutting edge technology in the way they work and the way they portray their work and analysis to the public.”

“Like every government agency, the regulator is trying to modernize the technology used to gather and process data and also to make information available to members of the public.”

Others interpreted this function in relation to public engagement and increased transparency.

“Engaging with the public and offering full transparency through its website and social media.”

“To me it means that they are more readily accessible to the public using digital means and an individual can go and review their policies and what they are acting on. Also see how things are being enforced with transparency.”

Some participants also mentioned more readily available information about energy usage and related matters.

“Keeps up with all current data production, usage and when peak periods occur.”

“The collection of data in a digital format to give the most accurate readings.”

On average, participants rated the importance of data and digital transformation as an 8 out of ten and about six in ten rated it a 9 or 10, indicating they believe this function is important but to a somewhat lesser degree than the other functions.

While participants value data and digital innovation, some suggest that the CER has more important priorities.

“This seems like a normal part of any corporate operation, but not necessarily one that needs to be prioritized.”

“I feel like it's important but at the same time for a company whose main focus is safety and doing things according to the law I don't feel like digital innovation falls quite as high on the importance scale.”

“Sharing information and providing channels for feedback and inquiry are important but I think that transparency about projects and building trust is more important.”

Others see information as a foundation for good decision-making.

“Having accurate information is the cornerstone to making good, responsible, informed decisions.”

“It's important to be able to access this type of information in a timely matter so good decisions can be made.”

4. Reconciliation

Transforming the way we work with the Indigenous peoples of Canada, with a commitment to implementing the United Nations Declaration on the Rights of Indigenous Peoples, by enhancing their involvement in how we discharge our mandate recognizing their unique cultures, knowledge and histories; building renewed relationships based on the recognition of rights, respect, co-operation and partnership; improving the cultural competency of the CER and its staff; and driving meaningful change in the CER's requirements and expectations of regulated industry.

Participants interpret Reconciliation as building or repairing relationships, respecting the land and water, and seeking permission.

“What this means is working with Indigenous people and ensuring that we do our part to rebuild and form strong positive relationship with them...”

“Acting with permission of the people on their lands...”

“Reconciliation is about recognizing and acknowledging the past with meaning to those involved and building bridges to move forward...”

“Reconciliation means to restore relationships or make amends...”

“Taking steps to acknowledge the rights of Indigenous peoples and ensure they are respected in the process of providing energy to the country.”

A few participants connected this to consultation and involvement in planning, while others mentioned education of staff.

“Consulting with individual Indigenous groups that stand to be effected by future development plans and making them a meaningful part of the planning process of said projects; ensuring that the Indigenous groups benefit where possible.”

“They will educate their staff on UN Declaration and on how to better understand Indigenous peoples and how to work with them.”

On average, participants rated the importance of Reconciliation as an 8.3 out of ten and three in four rated it a 9 or 10.

Participants generally consider Reconciliation important out of recognition of past wrongs, and out of respect for Indigenous land and rights.

“It's important to have a better understanding of Indigenous people's culture and history, we need their support when building new energy projects.”

“Indigenous people have been living on the land for centuries and they need to be respected and understood.”

“I think it's really important to have Indigenous peoples involved when it comes to decision making for planning and constructing energy infrastructure because of their historical and cultural connection to the land.”

Specific Interests

Participants were asked about their interest levels in each of the CER's main responsibilities, as well as why they feel the way they do, what more they would like to know and the formats they prefer.

Seven in ten or more are at least somewhat interested in each of the four responsibilities, and between three in ten and half of participants find the priorities very interesting.

Trust and Confidence: Half of the participants find trust and confidence very interesting, primarily because trust is seen as foundational for relationships and legitimacy. Transparency also comes up as an important element of building trust.

"If you do not have the trust and confidence of people, you will not be able to accomplish anything."

"This is very interesting to me because this is the foundation in which makes a relationship rock solid."

"There isn't much trust in those running the energy sector from the public now because they are not transparent, transparency would lead to more trust and support from the public."

"It is interesting because I would like to know how the CER will establish this trust, as trust is not something that can be established quickly. I am interested to know how they can create such an empowered workforce and keep them feeling engaged and empowered over time as well."

As a result, those who are interested in trust and confidence want to learn how communications will be handled, who is involved in engagement and where, how the workforce will be empowered and what steps are being taken to build relationships with Indigenous peoples.

"I would like to know more about the actions that will take place to establish that trust and confidence for the CER. Such as, what does transparency look like, how much transparency, how would they go about creating these relationships with the Indigenous people, what would they approach be, etc."

Participants also want to learn how the CER plans to implement this priority and what accountability measures will be in place.

"I would like to know what systems are in place to keep this accountable? It's well and good to claim that you will be transparent and inclusive, etc. but I don't necessarily have trust in an entity to report honestly about itself."

"I would like to know how they are going to implement this. Will they hire these people, work with them, meet them in a neutral spot?"

Competitiveness: Four in ten find competitiveness very interesting. This stems from interest in the shift to low carbon energy, innovation and economic growth.

“I think this is something that is important in the current climate - how do you maintain or increase competitiveness while still meeting the current focus towards more environmentally friendly practices?”

“Besides improving and enhancing the overall competitiveness (efficiency, transparency and dependability) in the regulatory cycle, I am particularly interested in Climate Change initiatives and Canada’s pledge to net zero carbon emissions, energy sector is vitally important to this goal.”

“I want our economy to be better and for us to shine brighter on a global scale. We can do this through being more competitive. A low carbon economy is also very important long term to creating a better and more sustainable society...”

Participants would like insight into the types of innovations being made, how CER will contribute to the transition to a low carbon economy and if progress is being made.

Other participants are interested in knowing if enough low carbon energy can be produced to meet domestic demand and if that can be done while keeping prices low.

Data and Digital Innovation: Three in ten find data and digital innovation very interesting. Participants find this interesting because it suggests CER is staying current with technology, providing opportunities for digital engagement and public access, and making useful information available.

“I would be interested in knowing what the latest technology systems and communications products are being used by CER in order to make the decisions and communicate effectively with all parties involved.”

“I am interested in enhanced opportunities for digital engagement for public access. This seems most transparent and efficient.”

“I like the idea of an easier way to display information with innovation while having it publicly accessible to have transparency and finding different ways to improve the service for the ease of the community.”

They are interested in different types of information such as: the initiatives CER has implemented to improve digital innovation and access to data; what are CER’s plans to encourage people to engage; and how the information will be made easy for people to understand and access.

Others are interested in what statistics and variables are being tracked and trended, and how the CER plans to show Canadians and the world how Canada is leading in energy.

Reconciliation: Just over half of participants find Reconciliation to be very interesting, primarily because they want Indigenous people and their rights and land to be respected.

“It is essential to respect culture heritage, safeguard their rights and protect the land.”

“I am interested in this because, reconciliation is essential.”

Participants are curious for details on how this will be approached, the processes and plans, and updates on progress and results. There is interest in how the views of Indigenous peoples will be taken into account and in hearing Indigenous perspectives on how the CER has engaged with them. Others expressed interest in learning about the history of Indigenous peoples across Canada, their rights and what the UN Declaration consists of.

Format of information: In terms of format for the types of information requested, participants suggested a range of options including, videos, text-based information (simple bullet point sheet or PowerPoint), infographics, social media posts, websites and emails. Livestreaming of meetings or consultations was also suggested by a small number. Participants are seeking clarity and detail, but also want information that is easy to digest.

Searching for information

Participants were asked to select one of the CER's four priorities and describe how they would proceed if they needed to find additional information about it. The process did not vary greatly depending on which term participants had chosen to search for.

Most would start with a Google search using either CER or the priority area as their search term(s). Other participants mentioned searching for companies in the relevant industries, Indigenous groups, Environmental groups, as well as names of pipelines or pipeline companies.

Generally, participants said they would focus on sources that they deem reliable, including government websites, traditional media, social media and forums (e.g., Reddit, Tumblr).

Instead of starting with key terms, some participants mentioned they would go straight to the websites of sources they think would be useful or reputable. Many participants mentioned they would use the CER website as a starting point.

Beyond these, a couple of participants each mentioned: other search engines (Yahoo, Firefox); YouTube; or their local library.

Awareness of the CER social content

Participants were asked about their awareness of the CER prior to participating in the study and about six in ten report prior awareness. Most of them first learned about the CER through media and the news, often when there is a controversial project or a protest.

A smaller number of participants first learned of the CER through employment, either in the industry, government or NGOs.

Others with previous awareness of the CER said they learned about the organization through word of mouth/ from friends or family or noted that they don't recall the source or "always knew" about it.

CER content on social media: Only a small number of participants report having seen CER content on Twitter, Facebook or LinkedIn, although most of those who had indicate they check those feeds daily.

Similarly, only a small proportion of participants had visited the CER website prior to the study, and most were looking for information about a project under consideration or about the organization and its role.

These results suggest that members of the public are most likely to learn about the CER and its activities in the news, rather than from the CER itself.

Appendix A: Quantitative Methodology

This research consisted of a mixed-mode survey of adult Canadians based on the following design:

- 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 906 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 102 adult Canadians living in the northern territories, using the same questionnaire and industry-standard random-digit-dialing techniques.

The survey obtained the following regional distribution:

| Target Group | Proportion of Population | Target (Quota) | Actual Unweighted | Actual Weighted* |
|--------------|--------------------------|----------------|-------------------|------------------|
| Total | 100% | 1,000 | 1,008 | 1,008 |
| Atlantic | 7% | 100 | 99 | 66 |
| Quebec | 23% | 200 | 210 | 234 |
| Ontario | 38% | 200 | 206 | 386 |
| MB/SK | 7% | 100 | 94 | 69 |
| Alberta | 11% | 150 | 146 | 117 |
| BC | 14% | 150 | 151 | 134 |
| Territories | <1% | 100 | 102 | 2 |

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

Questionnaire design

In 2020, Environics worked with the Canada Energy Regulator to create questionnaire that would serve as a baseline for future tracking studies. To ensure comparability of results, approximately 90% of the questions in the 2021 quantitative survey were retained from the questions in the 2020 survey. The 2021 questionnaire was used again in 2022. 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 in 2021, 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 made to the questionnaire, pre-testing was not completed for the 2022 survey.

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 January 19 to February 7, 2022. 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 January 24 to 29, 2022.

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 (automated) | 5182 |
| Invalid (undelivered) | 7 |
| Broadcasts delivered | 5175 |
| Unresolved (U) | 1969 |
| Did not respond | 1969 |
| In-scope non-responding (IS) | 103 |
| Qualified respondent break-off (drop out) | 103 |
| In-scope – responding (R) | 3248 |
| Disqualified | 286 |

| | |
|--|---------|
| Quota filled | 1953 |
| Completed | 906 |
| Contact rate $[(R+IS) / (U + IS + R)]$ | 62.99 % |
| Participation rate $[R / (U + IS + R)]$ | 61.05 % |

Contact disposition – telephone survey

| Disposition of calls | TOTAL |
|--|---------------|
| Total sample dialled | 1 988 |
| Unresolved numbers (U) | 978 |
| Busy | 59 |
| No answer | 545 |
| Voicemail | 374 |
| Resolved numbers (Total minus Unresolved) | 1 010 |
| Out of scope (Invalid/non-eligible) | 364 |
| Non-household | 6 |
| Not-in-service | 351 |
| Fax/modem | 7 |
| In-scope non-responding (IS) | 509 |
| Refusals – household | 173 |
| Refusals – respondent | 176 |
| Language barrier | 30 |
| Callback missed/respondent not available/ill | 119 |
| Break-offs (interview not completed) | 11 |
| In-scope - responding (R) | 137 |
| Disqualified | 35 |
| Quota filled | 0 |
| Completed | 102 |
| Response rate $[R / (U + IS + R)]$ | 8,44 % |

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 | |
| Male | 49 |

| | |
|--|----|
| Female | 51 |
| Education | |
| High school or less | 24 |
| Trades/some post sec | 15 |
| College | 22 |
| University graduate/post-graduate | 39 |
| Employment status | |
| Full time/self employed | 46 |
| Part time | 9 |
| Not employed (student, unemployed, homemaker etc.) | 17 |
| Retired | 29 |
| Total annual household income | |
| Under \$40,000 | 24 |
| \$40,000-<\$60,000 | 20 |
| \$60,000-<\$80,000 | 16 |
| \$80,000-<\$100,000 | 14 |
| \$100,000+ | 26 |
| Language spoke most at home | |
| English | 77 |
| French | 24 |
| 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). 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 | 50% | 49% |
| Female | 50% | 51% |
| Age | | |
| 18-34 | 24% | 29% |
| 35-49 | 26% | 24% |
| 50-64 | 25% | 26% |
| 65+ | 24% | 21% |
| Education level ^a | | |
| High school diploma or less | 27% | 35% |
| Trades/college/post sec no degree | 36% | 36% |
| University degree | 36% | 29% |

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

^aActual 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 11-2022

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 **20220113-EN049**.

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- Francis / 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 **20220113-EN049**.

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 14-21. 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 |
|----------|----|

21a. Overall, how confident are you in the Canada Energy Regulator or CER?

| | |
|--|----|
| Not at all confident | 1 |
| | 2 |
| | 3 |
| | 4 |
| | 5 |
| | 6 |
| | 7 |
| | 8 |
| | 9 |
| Very confident | 10 |
| VOLUNTEERED– DO NOT SHOW ONLINE | |
| Not sure | 99 |

21b. Why do you say that?

OPEN-END

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
- 26. Inclusive

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

27. 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

28. 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)

29. 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?)

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. . .

30. 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

31. 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

F1. **[TO BE ASKED ONLINE ONLY – PROGRAMMING NOTE: THIS QUESTION NON-MANDATORY]**

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

- 01 - First Nations
- 02 – Inuk/Inuit
- 03 – Métis
- 04 - A non-Indigenous person

32. 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

33. 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

34. 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

QUALITATIVE ASSESSMENT & INVITATION – ELIGIBLE FOR QUAL IF V/SW ON AT LEAST ONE OF Q 9-13.

QUAL_GROUP. THERE ARE TWO BOARDS – ENGLISH & FRENCH. ASSIGN RESPONDENTS TO A BOARD BASED ON LANGUAGE.

QUAL PARTICIPATION SCREENING QUESTIONS

1. In the text box below, please describe what you consider to be the luckiest thing that ever happened to you. Please be as specific and detailed as possible, and explain not just what happened, but how you felt.

77 – Text box: [SET MIN 50 CHARS]

2. On a scale of 1 to 10, how well do the following statements express your feelings. A score of 10 means the statement describes your feelings extremely well, a score of 1 means that the statement does not describe your feelings at all, or you can use any number in between.

1 < DOESN'T DESCRIBE ----- DESCRIBES WELL > 10

- a. If asked to describe something, I can usually do so in detail:
 - b. I'm comfortable expressing my feelings online:
 - c. My friends often ask my opinions of things:
 - d. I generally have an opinion or point-of-view on topics or issues:
 - e. I enjoy exchanging ideas with people on a wide variety of things:
 - f. People tell me I'm creative:
 - g. I will share my ideas, even if other people have different points of view:
- 1 2 3 4 5 6 7 8 9 10

**QUAL B: ELIGIBLE FOR QUAL IF 4 OR MORE STATEMENTS WITH A RATING OF “7”, “8”, “9”, OR “10”.
IF NOT AND QUALIFY ON ALL OTHER CRITERIA, HOLD RESPONDENT.**

QUAL1. [IF ELIGIBLE AT QUAL A AND QUAL B] We may conduct follow-up qualitative research to better understand your information preferences and perspectives on the Canada Energy Regulator/CER. This would take the form of a moderated online community of Canadians like yourself. Participants would receive an honorarium of \$100 as a thank you for their time.

Participating in the next phase of research is completely voluntary. If you are interested, you will be required to provide your first name, last name and email address to be screened for the online community. Please note that this information will not be used for any analysis of your responses and will only be used if you are selected to be among those invited to participate in a subsequent qualitative phase of research.

Would you be interested in participating?

- Yes
- No

QUAL2: Please provide us with the following contact information so we can send you details about the online community if you are selected to participate:

| | |
|---------------|--|
| First name | |
| Last name | |
| Email address | |

I am not willing to provide my contact information (you will not be invited to participate).

Thank you. We will let you know as soon as possible if you qualify for the study. Have a great day!

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.

Appendix C: Qualitative Methodology

The qualitative research used an online community format called bulletin boards. The bulletin boards were conducted using the Recollective platform that is programmed and hosted in Canada. This online community was conducted over a period of three days, following the completion of the quantitative survey.

The qualitative research was conducted with 113 participants in English (n=88) and in French (n=25). Participants were selected from those who indicated they are very or somewhat interested in learning more about the CER. Environics achieved a mix of region, age, gender, education and income. The sample composition is as follows:

| Employment Status | Count | Percentage |
|---|-------|------------|
| Employed full-time for pay (30+ hours per week) | 41 | 36% |
| Employed part-time for pay | 19 | 17% |
| Self-employed | 7 | 6% |
| Unemployed and looking for work | 3 | 3% |
| Homemaker | 13 | 12% |
| Student | 4 | 4% |
| Retired | 23 | 20% |
| Other | 3 | 3% |
| Prefer not to say | 0 | 0 % |

| Industry | Count | Percentage |
|----------------------------|-------|------------|
| Education | 8 | 12 % |
| Retail/Food or beverage | 7 | 10 % |
| Federal Government | 6 | 9 % |
| Factory/manufacturing | 5 | 7 % |
| Provincial Government | 4 | 6 % |
| Banking or finance | 3 | 4 % |
| Health care | 3 | 4 % |
| Accounting, Law or other | 2 | 3 % |
| Farmer/Rancher | 2 | 3 % |
| Local/municipal Government | 2 | 3 % |
| Oil and gas – office/HQ | 2 | 3 % |
| NGO | 1 | 1 % |
| Other | 23 | 34 % |

| Demographics | Frequency in English Community (n=88) | Frequency in French Community (n=25) |
|--|---------------------------------------|--------------------------------------|
| Region | | |
| Newfoundland and Labrador | 2 | 0 |
| Nova Scotia | 8 | 0 |
| New Brunswick | 5 | 0 |
| Quebec | 5 | 22 |
| Ontario | 27 | 1 |
| Manitoba | 2 | 0 |
| Saskatchewan | 4 | 0 |
| Alberta | 16 | 1 |
| British Columbia | 16 | 0 |
| Yukon | 1 | 0 |
| Northwest Territories | 1 | 0 |
| Nunavut | 1 | 0 |
| Age | | |
| 18-29 | 19 | 1 |
| 30-44 | 27 | 10 |
| 45-54 | 17 | 7 |
| 55+ | 25 | 7 |
| Gender | | |
| Man | 48 | 15 |
| Woman | 40 | 10 |
| Education | | |
| Less than a high school diploma or its equivalent | 2 | 0 |
| High school diploma or a high school equivalency certificate | 17 | 2 |
| Trades certificate or diploma | 4 | 0 |
| College, CEGEP or other non-university certificate or diploma (other than trades certificates or diplomas) | 18 | 7 |
| University certificate, diploma or degree below the bachelor's level | 8 | 2 |
| Bachelor's Degree (e.g., B.A., B.A. (Hons), B.Sc., B.Ed., LL.B.) | 32 | 8 |
| University certificate, diploma or degree above the bachelor's level | 7 | 5 |
| Indigenous Status | | |
| Indigenous Person | 7 | 1 |
| Non-Indigenous person | 81 | 24 |
| Income Level | | |
| \$150,000 and above | 8 | 4 |
| \$100,000 to just under \$150,000 | 14 | 4 |
| \$80,000 to just under \$100,000 | 17 | 3 |
| \$60,000 to just under \$80,000 | 13 | 6 |

| | | |
|---------------------------------|----|---|
| \$40,000 to just under \$60,000 | 20 | 5 |
| \$20,000 to just under \$40,000 | 11 | 0 |
| Under \$20,000 | 5 | 2 |

Appendix D: Qualitative Research Instruments

Environics Research Group
January 13-2022

Canada Energy Regulator
Annual Public Opinion Research Measures
Draft Recruitment Screener

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 study being conducted by Environics Research, an independent research company, on behalf of the Government of Canada. This short survey will take about 3 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 **20210127-EN772**.

Thank you in advance for your participation.

C In which province or territory do you live?
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.

- 12 – 18 to 19
- 13 – 20 to 24
- 14 – 25 to 29
- 15 – 30 to 34
- 16 – 35 to 39
- 17 – 40 to 44
- 18 – 45 to 49
- 19 – 50 to 54
- 20 – 55 to 59
- 21 – 60 to 64
- 22 – 65 and over

VOLUNTEERED

99 - REFUSED

E. What is your gender?

SHOW: 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.

- 01 – Man
- 02 – Woman
- 97 – Or please specify

F. 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

97 - Don't know/Refused

G. 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

Awareness And Familiarity

35. 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.

36. **IF NOT CER 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

37. **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

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: Making decisions or recommendations to the federal government in relation to proposed pipelines, international power lines and other matters)
10. Safety and environment oversight: Setting and enforcing regulatory expectations for companies regulated by CER)
11. 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)
12. Engagement activities: 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

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

14. [TO BE ASKED ONLINE ONLY – PROGRAMMING NOTE: THIS QUESTION NON-MANDATORY]

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

- 01 - First Nations
- 02 – Inuk/Inuit
- 03 – Métis
- 04 - A non-Indigenous person

QUAL A: ELIGIBLE FOR QUAL IF V/SW ON AT LEAST ONE OF Q 9-13.**QUALITATIVE ASSESSMENT & INVITATION**

QUAL_GROUP. THERE ARE TWO BOARDS – ENGLISH & FRENCH. ASSIGN RESPONDENTS TO A BOARD BASED ON LANGUAGE.

QUAL PARTICIPTION SCREENING QUESTIONS

1. In the text box below, please describe what you consider to be the luckiest thing that ever happened to you. Please be as specific and detailed as possible, and explain not just what happened, but how you felt.

77 – Text box: [SET MIN 50 CHARS]

2. On a scale of 1 to 10, how well do the following statements express your feelings. A score of 10 means the statement describes your feelings extremely well, a score of 1 means that the statement does not describe your feelings at all, or you can use any number in between.

1 < DOESN'T DESCRIBE ----- DESCRIBES WELL > 10

- a. If asked to describe something, I can usually do so in detail:
- b. I'm comfortable expressing my feelings online:
- c. My friends often ask my opinions of things:
- d. I generally have an opinion or point-of-view on topics or issues:
- e. I enjoy exchanging ideas with people on a wide variety of things:
- f. People tell me I'm creative:
- g. I will share my ideas, even if other people have different points of view:

1 2 3 4 5 6 7 8 9 10

**QUAL B: ELIGIBLE FOR QUAL IF 4 OR MORE STATEMENTS WITH A RATING OF “7”, “8”, “9”, OR “10”.
IF NOT AND QUALIFY ON ALL OTHER CRITERIA, HOLD RESPONDENT.**

QUAL1. [IF ELIGIBLE AT QUAL A AND QUAL B] We may conduct follow-up qualitative research to better understand your information preferences and perspectives on the Canada Energy Regulator/CER. This would take the form of a moderated online community of Canadians like yourself. Participants would receive an honorarium of \$100 as a thank you for their time.

Participating in the next phase of research is completely voluntary. If you are interested, you will be required to provide your first name, last name and email address to be screened for the online community. Please note that this information will not be used for any analysis of your responses and will only be used if you are selected to be among those invited to participate in a subsequent qualitative phase of research.

Would you be interested in participating?

- Yes
- No

Canada Energy Regulator

Annual Public Opinion Research Measures

Qualitative Discussion Guide

| Day 1: About you, and understanding the CER | |
|---|---|
| <p>HELLO and WELCOME!</p> <p>Thanks for joining me today! My name is _____ and I will be your moderator for this discussion.</p> <p>I would like to ask you to share with me your thoughts, experiences and perceptions about the Canada Energy Regulator. For each key question posted, there will be sub-questions. Please try to be as clear and as detailed as you can when you respond to each question and sub-question, because your answers are really important to me and will help me understand how you think and what is important to you.</p> <p>Sometimes I will ask some follow up questions to make sure I really understand your answers – please make sure you come back and check on this board to see if there are any follow up questions for you.</p> <p>Today we are going to be talking about the roles and responsibilities of the CER and your views about them. Tomorrow, we will dive into more details about your specific interests and information preferences.</p> | Introduction |
| <p>I. Getting to know you</p> <p>A. To get us started, briefly introduce yourself, and share something about yourself that is interesting or unique (i.e., your interests, hobbies, etc.).</p> | Warm up / Ice break. |
| <p>II. Energy in your life</p> <p>We want to know about your connections to the CER and its mandate.</p> <p>A. Do you have any involvement in the oil and gas, pipeline or power / powerline line industry? Please describe?</p> <p>B. Have you ever been affected by energy infrastructure such as a pipeline or powerline – perhaps by living near one or in some other way? Please describe that experience: when, what, how were you affected, did you get involved?</p> <p>C. Is there anything else you wish to tell us about yourself and the energy sector?</p> | Context: do respondents have relevant background / perspectives |
| <p>III. Mission of the Canada Energy Regulator</p> <p>The mission of the Canada Energy Regulator is as follows:</p> <p>Regulating infrastructure to ensure safe and efficient delivery of energy to Canada and the world, protecting the environment, recognizing and respecting the rights of the Indigenous peoples of Canada, and providing timely and relevant energy information and analysis.</p> | Understanding of the CER's mission |

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| <p>A. What does this mean to you? Please describe what you think the CER does in your own words.</p> | |
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| <p>IV. Vision of the Canada Energy Regulator</p> <p>The vision of the Canada Energy Regulator is as follows:</p> <p>An energy regulator with an exemplary workforce that has the confidence of Canadians; is dedicated to ensuring safety and environmental sustainability; builds strong relationships with First Nations, the Métis, and the Inuit; and enhances Canada's global competitiveness.</p> <p>A. What does this mean to you? How likely do you think it is that the CER will achieve this vision?</p> | |
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| <p>V. CER Priorities</p> <p>The Canada Energy Regulator has four priorities. For each please indicate: (a) what it means in your own words; (b) how important you think it is – using a scale from 1, not at all important, to 10, extremely important (you can any number from 1-10); and (c) why you feel that way.</p> | <p>Understanding of and perceived importance of the CER's responsibilities</p> |
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| <p>Trust and Confidence. Fostering trust and confidence of Canadians in the CER through robust communications, transparency, collaboration and inclusive engagement; building respectful relationships with the Indigenous peoples of Canada; and fostering an engaged and empowered workforce.</p> <p>A. Trust and Confidence: What does this mean to you?</p> <p>B. How important do you think this is – please enter a number from 1-10: _____</p> <p>C. Please tell us why.</p> <p>Competitiveness: Enhancing Canada’s global competitiveness by improving transparency, predictability and efficiency throughout the regulatory lifecycle, while driving innovation that contributes to the transition to a low carbon economy.</p> <p>A. Competitiveness: What does this mean to you?</p> <p>B. How important do you think this is – please enter a number from 1-10: _____</p> <p>C. Please tell us why.</p> | |
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| <p>V. CER Priorities Continued</p> <p>The Canada Energy Regulator has four priorities. For each please indicate: (a) what it means in your own words; (b) how important you think it is – using a scale from 1, not at all important, to 10, extremely important (you can any number from 1-10); and (c) why you feel that way.</p> | <p>Understanding of and perceived importance of the CER’s responsibilities</p> |
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Data and Digital Innovation: Creating a data and digital innovation culture and systems that enable the effective delivery of the CER's mandate; allow for improved public access, use and analysis of accurate data and energy information for meaningful participation and informed decision-making; and enhance opportunities for digital engagement.

A. Data and Digital Innovation: What does this mean to you?

B. How important do you think this is – please enter a number from 1-10: _____

C. Please tell us why.

Reconciliation: Transforming the way we work with the Indigenous peoples of Canada, with a commitment to implementing the United Nations Declaration on the Rights of Indigenous Peoples, by enhancing their involvement in how we discharge our mandate recognizing their unique cultures, knowledge and histories; building renewed relationships based on the recognition of rights, respect, co-operation and partnership; improving the cultural competency of the CER and its staff; and driving meaningful change in the CER's requirements and expectations of regulated industry.

A. Reconciliation: What does this mean to you?

B. How important do you think this is – please enter a number from 1-10: _____

C. Please tell us why.

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| <p>VI. Demographics – keep private</p> <p>To end today’s discussion, we just have a few questions that will help us understand your background a bit more. Your responses to these questions will not be shared with other members of this discussion group.</p> <ol style="list-style-type: none"> 1. What is your current employment status? [Employed full-time for pay (30+ hours per week)/Employed part-time for pay/Self-employed/Unemployed and looking for work/Homemaker/Student/Retired/Other/Prefer not to say] 2. IF EMPLOYED: Which of the following most closely describes your employment: <ul style="list-style-type: none"> • Retail/Food or beverage • Factory/manufacturing • Oil and gas – in the field • Oil and gas – office/HQ • Utility • Banking or finance • A regulatory organization • Accounting, Law or other professional service/consulting • Environmental • NGO • Farmer/Rancher • Local/municipal Government • Provincial Government • Federal Government • Health care • Education • Market Research or Marketing • Public Relations or Media (TV, Print) • Advertising and communications • An employee of a political party • Other, please specify | <p>Measure demographics for context / analysis</p> |
| <p>That’s all for today – thank you so much for this discussion today! We look forward to hearing from you again tomorrow!</p> | |

| Day 2: Specific Interests and information searching / tools | |
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| <p>VII. Specific Interests</p> <p>The following are the overall priorities the Canada Energy Regulator. For each one, please tell us: (a) How interested you are in knowing more about it; (b) why it is interesting to you; (c) what additional information you would like to have; and (d) what format(s) you would like that information to be made available in (text, video, audio, something else – tell us what you would use)?</p> <ol style="list-style-type: none"> 1. Trust and Confidence. Fostering trust and confidence of Canadians in the CER through robust communications, transparency, collaboration and inclusive engagement; building respectful relationships with the Indigenous peoples of Canada; and fostering an engaged and empowered workforce. <ol style="list-style-type: none"> A. Is this ___ very, ___ somewhat, ___ not very or ___ not at all interesting to you? B. Why is that? C. What, if anything, more would you like to know? D. What format(s)? 2. Competitiveness: Enhancing Canada’s global competitiveness by improving transparency, predictability and efficiency throughout the regulatory lifecycle, while driving innovation that contributes to the transition to a low carbon economy. <ol style="list-style-type: none"> A. Is this ___ very, ___ somewhat, ___ not very or ___ not at all interesting to you? B. Why is that? C. What, if anything, more would you like to know? D. What format(s)? | <p>Explore interest in elements of the mandate</p> |

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| <p>VII. Specific Interests Continued</p> <p>3. Data and Digital Innovation: Creating a data and digital innovation culture and systems that enable the effective delivery of the CER’s mandate; allow for improved public access, use and analysis of accurate data and energy information for meaningful participation and informed decision-making; and enhance opportunities for digital engagement.</p> <p>A. Is this ___ very, ___ somewhat, ___ not very or ___ not at all interesting to you?</p> <p>B. Why is that?</p> <p>C. What, if anything, more would you like to know?</p> <p>D. What format(s)?</p> <p>4. Reconciliation: Transforming the way we work with the Indigenous peoples of Canada, with a commitment to implementing the United Nations Declaration on the Rights of Indigenous Peoples, by enhancing their involvement in how we discharge our mandate recognizing their unique cultures, knowledge and histories; building renewed relationships based on the recognition of rights, respect, co-operation and partnership; improving the cultural competency of the CER and its staff; and driving meaningful change in the CER’s requirements and expectations of regulated industry.</p> <p>A. Is this ___ very, ___ somewhat, ___ not very or ___ not at all interesting to you?</p> <p>B. Why is that?</p> <p>C. What, if anything, more would you like to know?</p> <p>D. What format(s)?</p> | |
| <p>VIII. Searching for Information</p> <p>Please choose one of the CER’s four priorities – Trust and Confidence, Competitiveness, Data and Digital Innovation, or Reconciliation – and describe how you would proceed if you needed to find additional information about it.</p> <p>Where would you look? How would you organize your search? What website, search engine, app and/or other tools would you use?</p> <p>Please elaborate in detail.</p> | <p>What media and tools do people use when searching for information such as that provided by CER</p> |

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| <p>IX. Awareness of CER</p> <p>Prior to participating in this study, were you aware of the Canada Energy Regulator?</p> <p>IF YES – Continue, other skip to END</p> <p>1. Please describe how you first became aware of the CER?</p> <p>How did it happen? What was the situation? What do you recall about it? What were your impressions?</p> <p>2. Have you seen any CER content on: Twitter _____ LinkedIn _____ and/or Facebook _____</p> <p>3. IF YES: How regularly do you check these? Daily _____ Weekly _____ Monthly _____ Less often _____</p> <p>4. Have you visited the CER website before?</p> <p>5. IF YES: Do you remember what you were looking for when you visited?</p> | <p>How do people become aware of CER; do they follow CER social; know the website</p> |
| <p>Follow up.... End and thank.</p> <p>Thank you very much for your time! Is there anything else you want to add based on what we've discussed over the past 2 days?</p> <p>Thanks again everyone! We hope you have a great day.</p> | |