



Canada Energy  
Regulator

Régie de l'énergie  
du Canada

# ***Annual Public Opinion Research Measures 2021***

## **Final Report**

### **Prepared for Canada Energy Regulator**

Supplier Name: Environics Research

Contract Number: 84084-200133/002/CY

Contract Value: \$135,596.38 (including HST)

Award Date: 2021-01-12

Delivery Date: 2021-03-05

Registration Number: POR 099-20

For more information on this report, please contact Canada Energy Regulator at:  
[info@cer-rec.gc.ca](mailto:info@cer-rec.gc.ca)

**Ce rapport est aussi disponible en Français**

**Canada** 

## **Canada Energy Regulator – Annual Public Opinion Research Measures 2021**

### **Final report**

Prepared for the Canada Energy Regulator by Environics Research

March 2021

### **Permission to reproduce**

This public opinion research report presents the results of quantitative research conducted by Environics on behalf of the Canada Energy Regulator. The research was conducted online and by telephone with the general population, from January 28 to February 19, 2021.

This publication may be reproduced for non-commercial purposes only. Prior written permission must be obtained from the Canada Energy Regulator. For more information on this report, please contact the Canada Energy Regulator at: [Tom.Neufeld@cer-rec.gc.ca](mailto:Tom.Neufeld@cer-rec.gc.ca)

© Her Majesty the Queen in Right of Canada, as represented by the Minister of Public Services and Procurement Canada, 2021.

Cat. No. NE23-208/2021E-PDF

International Standard Book Number (ISBN): 978-0-660-38075-9

Cette publication est aussi disponible en français sous le titre nom *Mesures de recherche annuelle sur l'opinion publique de 2021*

N° de cat. N23-208/2021F-PDF (Final report, French)

ISBN: 978-0-660-38079-7

## Table of contents

<b>Executive summary</b> .....	<b>i</b>
<b>Introduction</b> .....	<b>1</b>
1. Background.....	1
2. Research rationale and objectives.....	1
3. About this report.....	1
<b>Detailed findings – Quantitative research</b> .....	<b>2</b>
Awareness of and familiarity with the CER.....	2
1. Unaided awareness of the CER.....	2
2. Aided awareness of the CER.....	3
3. Aided awareness of the National Energy Board .....	3
4. Familiarity with the CER.....	4
5. Familiarity with CER functions.....	5
Interest in learning about the CER.....	6
1. Overall interest in learning about the CER.....	6
2. Interest in learning about aspects of the CER’s work.....	7
Confidence in and perceptions of the CER.....	8
1. Confidence in the CER.....	8
2. Overall confidence in the CER .....	10
3. Perceptions of the CER .....	12
Pipeline/powerline information/awareness.....	13
1. Awareness of recent pipeline/powerline projects in Canada.....	13
2. Where heard/saw recent energy project information.....	14
3. Source of recent energy project information .....	15
Driver analysis: understanding overall confidence in the CER.....	16
<b>Detailed findings – Qualitative research</b> .....	<b>17</b>
I. Qualitative participant profile .....	17
Energy in your life .....	17
Understanding of the CER.....	17
CER responsibilities.....	18
1. Energy adjudication .....	18
2. Safety and environmental oversight.....	19
3. Energy information .....	19
4. Engagement.....	20
Confidence in the CER.....	21
Specific Interests .....	22
Searching for information.....	24
Awareness of the CER social content.....	24
<b>Appendix A: Quantitative Methodology</b> .....	<b>26</b>
<b>Appendix B: Quantitative research instrument</b> .....	<b>31</b>
<b>Appendix C: Qualitative Methodology</b> .....	<b>44</b>
<b>Appendix D: Qualitative Research Instruments</b> .....	<b>46</b>

## 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 second annual tracking study in early 2021. 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 1,012 Canadian adults (aged 18 years and older) between February 4 and 19, 2021. The sample included 910 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	1,012	1,012
Atlantic	7%	100	104	67
Quebec	23%	200	201	235
Ontario	38%	200	201	388
MB/SK	7%	100	100	69
Alberta	11%	150	153	117
BC	14%	150	151	135
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 17–19, 2021. A total of 132 Canadian adults from across the country

participated (109 in English and 23 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 \$135,596.38 (including HST).

### 4. Key findings

#### Quantitative findings

Canadians continue to have a good level of confidence in CER, especially as it relates 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 is slightly down from 2020 levels, but most Canadians still view the CER as an expert in its field. Seven in ten continue to say the term “expert” at least somewhat describes the CER.

While unaided awareness slightly increased since 2020, the Canada Energy Regulator is still not a top-of-mind name among Canadians – but, as before, no one organization is top of mind. A strong majority of eight in ten cannot think of the name of the organization responsible for the CER’s mandate unprompted. When prompted, four in ten do recognize the name “Canada Energy Regulator.” Recognition of the National Energy Board (NEB), its previous incarnation, is generally similar to 2020; 23 percent who are not aware of the CER are aware of the NEB, vs. 27 percent in 2020.

Consistent with 2020, among the four in ten who have heard of the CER, a minority of just under three in ten (28%) indicate they are familiar with it (score 7 to 10 on a 10-point familiarity scale); similar proportions (25% to 27%) are familiar with each of its specific functions. Although those familiar are in the minority, the majority of Canadians continue to express interest in knowing more: seven in ten are at least moderately interested in learning more about the CER itself, and about six in ten have modest interest in learning about its functions.

Awareness of energy projects is on par with 2020 results as well. In 2021, six in ten report having heard or seen information recently about existing or planned pipeline or powerline projects. Television remains the most cited source for this information. Consistent with 2020 results, government is most often mentioned as the source of this information, followed by environmental groups; one in ten (down from two in ten) believe the Canada Energy Regulator was the source of this information.

#### Qualitative findings

The qualitative research touched on understanding of the CER mandate and responsibilities, confidence in the organization, and interest in learning more about it, among other topics.

The results suggest that the CER’s mandate is quite comprehensible to participants, who most commonly describe the CER as an important authority, responsible for setting standards, and ensuring compliance of energy companies in Canada. They also generally understand its role in ensuring the safe transport of energy. The importance of safety and environmental protection are also evident in these results as is the CER’s role in stakeholder relations – where it is seen as balancing interests from a range of perspectives.

The participants were also asked to interpret key aspects of the CER’s role, by describing them in their own words and to indicate how important they consider each of them. The areas include energy adjudication, safety

and environmental oversight, energy information, and engagement. Safety and environmental oversight was deemed the most important among the four areas discussed by participants, followed by energy adjudication, engagement and then energy information.

Participants understand the CER's role in safety and environmental oversight as setting standards to ensure the safety of local communities, workers, and the environment. They also believe the CER monitors and audits energy companies to ensure compliance.

In the area of energy adjudication, participants understand that the CER reviews and assesses proposed energy projects and provides advice or guidance related to safety and environmental considerations. Some participants also noted that the CER's role is advisory with the government making the decisions.

The CER's engagement function is understood to mean hearing concerns from those who might be impacted by energy decisions, consulting with and initiating communication with interested parties. Indigenous peoples and their lands were often mentioned in this regard.

The participant interpretations of the CER's role in energy information were more varied, suggesting a lack of awareness about the specifics of what the CER does in this regard.

When asked to describe their levels of confidence in the CER, the rationales vary somewhat depending on prior knowledge of the organization. Those who feel more confident in the CER provide positive reasons such as trust in the CER and regulatory bodies in general. These participants assume that the CER employs specialized experts to carry out its important mandate. They believe that the CER has a reputation of being strict and careful with project approvals.

Participants with neutral positions often said they were unaware of the CER before the study. They felt it was difficult to feel strong confidence in an organization they have not interacted with and do not know much about.

Those with lower confidence in the CER are often influenced by media coverage and/or negative views about ongoing pipeline projects. Others are critical of whether the CER operates at 'arm's length' from the government or if it is biased by political interests.

The participants were also asked about their interest in learning more about the CER and what specifically they wish to know more about. Those interested in energy adjudication want to learn how that process works and how long it takes, including the criteria considered, interest groups involved, and underlying issues that the CER considers.

Similarly, in relation to safety and environmental oversight, participants expressed an interest in knowing that safety and environmental standards are effective and being followed, as well as how standards are set and what compliance procedures are in place.

In terms of energy information, participants expressed interest in a range of areas, such as: how pipelines are used, the environmental effects of pipelines, data about the demand and supply of different energy sources, data about Canada's energy usage, the financial considerations of energy decisions, and how Canada's energy sector compares to other countries.

In relation to engagement, participants asked for details on what the engagement process looks like: which stakeholders the CER engages, what methods of consultation and engagement are used, and the results from these activities. Participants also expressed special interest in what this process looks like for Indigenous communities.

**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.



Tony Coulson  
Group Vice President, Corporate & Public Affairs  
Environics Research Group  
[tony.coulson@environics.ca](mailto:tony.coulson@environics.ca)  
613-699-6882

**Supplier name:** Environics Research Group

PWGSC contract number: 84084-200133/002/CY

Original contract date: 2021-01-12

For more information, contact [Tom.Neufeld@cer-rec.gc.ca](mailto:Tom.Neufeld@cer-rec.gc.ca)