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du Canada

Annual Public Opinion Research Measures 2023

Final Report

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Canada Energy Regulator – Annual Public Opinion Research Measures 2023

Final report

Prepared for Canada Energy Regulator by Environics Research

February 2023

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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 fourth annual tracking study in early 2023. 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

EnviroNics Research surveyed 1,029 Canadian adults (aged 18 years and older) between February 2 - 13, 2023. The sample included 927 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	1,029	1,029
Atlantic	6.5%	100	90	68
Quebec	23%	200	215	239
Ontario	38.5%	200	216	394
MB/SK	6.7%	100	98	70
Alberta	11.5%	150	149	119
BC	13.5%	150	159	137
Territories	<1%	100	102	2

*Results are weighted by region, gender and age to 2021 Census data.

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

3. Cost of research

The cost of this research was \$157,646.30 (including HST).

4. Key findings

One in three Canadians are confident the CER ensures compliance, protects public safety, and makes data-driven decisions. Overall confidence is lower than prior years but Canadians continue to perceive the CER as an expert in its field, with six in ten saying this term describes the organization. However, the CER is not a household name and eight in ten cannot name an organization responsible for the CER's mandate. While unaided awareness remains consistent, total awareness continues a slight declining trend. Among those who have heard of the CER, between one in ten and two in ten are at least moderately familiar with each of its main functions; fewer than one in ten are very familiar. This is also lower than past results.

Despite lower familiarity, interest in the CER remains strong. Regardless of whether participants had seen or heard of the organization before, nearly two-thirds express interest in learning more about the CER and its work. Interest is consistent across most regions, but somewhat higher in Quebec. Similar to past years, safety and environment oversight and energy information are the two aspects of the CER's work that garner the most interest among Canadians.

When it comes to awareness of recent energy or pipeline projects, only one in three say they have recently heard about the topic. Although this is substantially lower than 2021 and 2020 levels, this proportion is consistent with 2022 results. Consistent with previous results, the government is the most common source of information on recent energy projects.

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 fourth annual public opinion tracking study in early 2023. This study serves as a follow-up to studies conducted by Environics from 2020 to 2022. These studies track Canadians' views on whether the CER 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 findings 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 survey results. A detailed description of the methodology is presented in Appendix A. The research instrument used to conduct this study is presented in Appendix B.

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=1,029 unless otherwise specified.

Detailed findings

Awareness of and familiarity with the CER

1. Unaided awareness of the CER

Similar to previous years, 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. Over eight in ten are unable to name an organization with this mandate, a slight increase from the previous years. Five per cent named the CER, also representing an increase from prior years. Unaided mentions of the NEB as the organization remain relatively unchanged at 1%. There is a range of other mentions, each cited by only small proportions.

Organization responsible for the CER's mandate – Tracking

Named organization	2020 Total (n=1,002)	2021 Total (n=1,012)	2022 Total (n=1,008)	2023 Total (n=1029)
NET: Canada Energy Regulator	1%	3%	3%	5%
Canada Energy Regulator	1%	2%	2%	2%
CER	-	1%	<1%	2%
Canadian Energy Regulator	<1%	<1%	<1%	1%
National Energy Board/ NEB	6%	2%	2%	1%
Pipeline (i.e. Trans Mountain)	2%	2%	<1%	0%
Hydro (incl. provincial)	2%	2%	2%	1%
Private companies (other)	2%	2%	<1%	0%
Federal government department (various)	2%	2%	1%	1%
TransCanada/TCPL/TC Energy	1%	1%	1%	0%
Commission/board (various)	1%	1%	1%	0%
Other mentions (<1% each)	3%	2%	4%	2%
Don't know	79%	81%	83%	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?

Organization responsible for the CER's mandate – by region

Named organization	2023 Total (n=1029)	BC (n=159)	AB (n=149)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
NET: Canada Energy Regulator	5%	8%	7%	3%	5%	2%	3%	-
Canada Energy Regulator	2%	4%	2%	1%	1%	2%	-	-
CER	2%	3%	3%	2%	1%	0%	3%	--
Canadian Energy Regulator	1%	1%	2%	-	2%	-	-	-
National Energy Board/ NEB	1%	1%	3%	2%	1%	1%	2%	1%
Pipeline (i.e. Trans Mountain)	0%	1%	-	-	-	-	-	-
Hydro (incl. provincial)	1%	4%	-	-	-	2%	-	-
Private companies (other)	0%	1%	1%	-	-	0%	1%	-
Federal government department (various)	0%	-	1%	1%	-	0%	-	-
TransCanada/TCPL/TC Energy	0%	1%	1%	-	0%	0%	-	-
Commission/board (various)	0%	-	-	2%	-	-	-	0%
Other mentions (<1% each)	1%	1%	2%	-	2%	1%	1%	1%
Don't know	86%	82%	80%	91%	87%	87%	91%	92%

As demonstrated in the table above, unaided awareness of the CER is generally similar across the country. Directly naming the CER is slightly higher in in British Columbia (8%) and Alberta(7%) compared to other provinces.

2. Aided awareness of the CER

Total awareness of the CER continues on a slight decline from prior years. 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; seven in ten have not. Total unaided and aided awareness is down compared to prior years, as shown in the following table.

Total awareness of CER – Tracking

Total awareness of the CER	2020 Total (n=1,002)	2021 Total (n=1,012)	2022 Total (n=1,008)	2023 Total (n=1029)
Net: aware	41%	41%	36%	31%
Unaided awareness	1%	3%	3%	5%
Aided awareness	40%	38%	33%	26%
No awareness	59%	59%	64%	69%

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=984)

Total awareness of CER – by region

Total awareness of the CER	2023 Total (n=1029)	Region						
		BC (n=159)	AB (n=149)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
Net: aware	31%	31%	48%	30%	26%	27%	34%	8%
Unaided awareness	5%	8%	7%	3%	5%	2%	3%	-
Aided awareness	26%	23%	41%	27%	21%	25%	31%	8%
No awareness	69%	52%	70%	74%	73%	66%	92%	92%

In this wave, total awareness ranges from a low of 8 per cent in the territories to a high of 48 per cent of Albertans. Prompted awareness of the CER is higher among Albertans (41% vs 26% total), men (33%, vs. 19% of women), those aged 55+ (34% vs 20% 54 years and under), and those who later in the survey indicate they have recent awareness about energy projects (39%, vs. 19% who do not).

3. Aided awareness of the National Energy Board

Among those who are not aware of the CER, four in ten recall the NEB, similar to previous years.

Those who had not heard of the Canada Energy Regulator even after prompting (n=723) were asked if they had heard of it under its previous name, the National Energy Board or NEB. Similar to the past few years, four in ten say they have heard of the NEB.

Aided awareness of the NEB among those not aware of the CER (n=723) – Tracking

Heard of NEB before survey	2020 Total (n=599)	2021 Total (n=614)	2022 Total (n=655)	2023 Total (n=723)
Yes, have heard of NEB	45%	39%	38%	38%
No, have not heard of NEB	55%	61%	62%	62%

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=723)

Aided awareness of the NEB among those not aware of the CER (n=723) – by region

Heard of NEB before survey	2023 Total (n=723)	Region						
		BC (n=115)	AB (n=79)	MB/SK (n=69)	ON (n=162)	QC (n=156)	ATL (n=60)	TERR (n=82)
Yes, have heard of NEB	38%	44%	39%	39%	47%	19%	42%	19%
No, have not heard of NEB	62%	56%	61%	61%	53%	81%	58%	81%

Awareness of the NEB (presented in the French version as the *l'Office national de l'énergie*) remains notably lower in Quebec and the territories (19% each) than other regions (39% to 47%). Recall of the NEB is higher among Canadians aged 55 and older (60%) and is higher among men (49%, vs. 30% of women), and those who are retired (62% vs total 38%).

4. Familiarity with the CER

One in ten who are aware of the CER say they are at least moderately familiar with it, lower than past results.

Those who had heard of the CER prior to the survey (n=306) were asked to indicate, using a scale of 1 to 10, how familiar they are with the organization. Roughly one in ten are at least somewhat familiar (12% scoring from 7 to 10), while more are unfamiliar (60% scoring 1 to 4). Similar to previous years, three in ten (29%) give a neutral response (5 or 6).

Familiarity with the CER among those who have heard of it (n=306)– Tracking

Level of familiarity with CER	2020 Total (n=403)	2021 Total (n=398)	2022 Total (n=353)	2023 Total (n=306)
Net: familiar (score 7-10)	31%	28%	33%	12%
Very familiar (score 9-10)	8%	6%	5%	1%
Somewhat familiar (score 7-8)	23%	22%	27%	11%
Neutral (score 5-6)	33%	27%	29%	29%
Net: not familiar (score 1-4)	36%	45%	38%	60%
Not very familiar (score 3-4)	20%	27%	26%	32%
Not at all familiar (score 1-2)	16%	18%	12%	28%
Mean	5.2	4.9	5.2	3.9

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?

BASE: Those with unaided or aided awareness of CER (n=306)

Familiarity with the CER among those who have heard of it (n=306) – By region

Level of familiarity with CER	2023 Total (n=1029)	Region						
		BC (n=44*)	AB (n=70)	MB/SK (n=29*)	ON (n=54)	QC (n=59)	ATL (n=30*)	TERR (n=20*)
Net: familiar (score 7-10)	12%	11%	11%	10%	13%	11%	13%	3%
Very familiar (score 9-10)	1%	2%	-	3%	-	3%	-	-
Somewhat familiar (score 7-8)	11%	9%	11%	7%	13%	7%	13%	3%
Neutral (score 5-6)	29%	26%	33%	31%	24%	36%	18%	6%
Net: not familiar (score 1-4)	60%	63%	56%	60%	63%	53%	69%	91%
Not very familiar (score 3-4)	32%	30%	28%	27%	39%	25%	37%	9%
Not at all familiar (score 1-2)	28%	33%	28%	32%	24%	28%	32%	82%
Mean	3.9	3.8	4.1	3.8	3.9	4.1	3.7	1.8

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

As in past results, familiarity with the CER is a minority position across the country and across population subgroups.

5. Familiarity with CER functions

Among those who have heard of the CER, between one in ten and two in ten 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 (31%), were given information about four key functions and asked how familiar they are with each, using a ten-point familiarity scale. Approximately two in ten 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=306)

Function	Very familiar (9-10)	Somewhat familiar (7-8)	Neutral (5-6)	Not very familiar (3-4)	Not at all familiar (1-2)
Safety and Environment Oversight	2%	16%	30%	20%	32%
Energy Information	2%	14%	25%	25%	35%
Energy Adjudication	4%	16%	26%	26%	29%
Engagement	2%	11%	26%	25%	36%

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=306)

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

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

Net familiar (score 7-10)	2020 Total (n=403)	2021 Total (n=398)	2022 Total (n=353)	2023 Total (n=306)
Safety & Environment Oversight	33%	27%	38%	18%
Energy Information	29%	26%	36%	16%
Energy Adjudication	33%	26%	40%	19%
Engagement	31%	24%	36%	13%

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=306)

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

Net familiar (score 7-10)	2023 Total (n=306)	Region						
		BC (n=44*)	AB (n=70)	MB/SK (n=29*)	ON (n=54)	QC (n=59)	ATL (n=30*)	TERR (n=20*)
Safety & Environment Oversight	18%	21%	19%	18%	17%	19%	17%	3%
Energy Information	16%	9%	11%	10%	21%	19%	14%	1%
Energy Adjudication	19%	12%	18%	10%	24%	22%	14%	3%
Engagement	13%	13%	14%	10%	15%	10%	14%	3%

Similar to previous results, 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 two-thirds are at least somewhat interested in learning more about the CER's work; one in ten are very interested, a slight decline from previous years.

Canadians were asked how interested they would be in learning more about the CER in general. Interest levels have slightly declined over the past few years, with almost two-thirds saying they are at least somewhat interested in learning more about the CER.

Interest in knowing more about the CER – Tracking

Interest in knowing more about the CER	2020 Total (n=1,002)	2021 Total (n=1,012)	2022 Total (n=1,008)	2023 Total (n=1029)
NET: Interested	73%	69%	67%	64%
Very interested	20%	16%	16%	11%
Somewhat interested	53%	53%	51%	53%
NET: Not interested	27%	31%	33%	36%
Not very interested	20%	24%	23%	27%
Not at all interested	7%	7%	9%	9%
Don't know/Refused	<1%	<1%	<1%	<1%

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

Overall interest ranges from a low of 60 per cent in BC to a high of 68 per cent in Quebec and the Atlantic. The range from high to low is smaller than in previous years, indicating a more consistent level of interest across regions.

Interest in knowing more about the CER – by region

Interest in knowing more about the CER	2023 Total (n=1029)	Region						
		BC (n=159)	AB (n=146)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
NET: Interested	64%	60%	61%	67%	62%	68%	68%	67%
Very interested	11%	7%	14%	17%	8%	14%	8%	31%
Somewhat interested	53%	53%	46%	50%	54%	54%	61%	35%
NET: Not interested	36%	40%	39%	33%	38%	32%	32%	33%
Not very interested	27%	34%	31%	25%	28%	20%	24%	14%
Not at all interested	9%	6%	8%	8%	10%	12%	8%	20%
Don't know/Refused	<1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

Overall interest in learning more about the CER is higher among men (69%) compared to women (58%) and somewhat higher among older Canadians aged 55+ (72%). Interest in learning more is also higher among those who are already aware of the CER (81%), and those with recent awareness of energy projects (76%).

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

Similar to previous years, over 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 four main aspects of the CER's work. More than half are somewhat or very interested in learning more about each aspect. Two-thirds express interest in learning more about safety and environmental oversight; three in five are interested in knowing more about energy information. Aligned with prior years, interest is somewhat lower for energy adjudication or engagement activities. Strong interest follows the same pattern, with one in five being very interested (score 9 or 10) in learning more about safety and environmental oversight.

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

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)	2023 Total (n=1029)
Safety and environment oversight				
Net: Interested	74%	73%	69%	67%
Very interested	28%	24%	21%	20%
Energy information				
Net: Interested	69%	69%	65%	61%
Very interested	22%	19%	17%	16%
Energy adjudication or reviewing applications				
Net: Interested	66%	62%	61%	56%
Very interested	18%	14%	15%	13%
Engagement activities				
Net: Interested	62%	59%	56%	53%
Very interested	16%	13%	13%	13%

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

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

Interest in knowing more about aspects of CER's work	2023 Total (n=1029)	Region						
		BC (n=159)	AB (n=146)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
Safety and environment oversight								
Net: Interested	67%	73%	65%	66%	64%	68%	71%	73%
Very interested	20%	21%	20%	33%	13%	25%	21%	33%
Energy information								
Net: Interested	61%	65%	64%	62%	58%	62%	65%	61%
Very interested	16%	15%	17%	19%	14%	19%	16%	26%
Energy adjudication or reviewing applications								
Net: Interested	56%	54%	56%	58%	52%	62%	57%	59%
Very interested	13%	10%	15%	15%	10%	18%	8%	20%
Engagement activities								
Net: Interested	53%	52%	56%	56%	50%	56%	53%	55%
Very interested	13%	9%	17%	20%	10%	15%	7%	14%

Interest in CER activities varies across population subgroups. Interest in energy adjudication is somewhat higher in Quebec (62%) compared to other provinces. Net interest in each of the four aspects is somewhat higher among men (ranging from 71%-55% vs 63%-50% for women) and is somewhat higher among older Canadians aged 55+ (between 71%-57%). 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

One in three Canadians are confident the CER ensures compliance, protects public safety, and makes data-driven decisions. Slightly lower proportions are confident in other aspects of the CER's work.

Canadians were shown eight statements that describe different aspects of the CER's work and asked to indicate their level of confidence regarding each, using a ten-point scale. Overall confidence (scoring 7 to 10) is lower than prior years. Three in ten or more are at least somewhat confident in the top three 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 three in ten agree to some extent with three other statements; Similar to previous results, 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 - Tracking

The CER ('s)...	2020 Net: confident (7-10)	2021 Net: confident (7-10)	2022 Net: confident (7-10)	2023 Net: Confident (7-10)
...ensures pipeline/powerline companies comply with relevant rules/regulations	45%	45%	45%	33%
...makes decisions that effectively ensure public safety	43%	44%	45%	32%
...decisions are based on the best available scientific information and data	43%	41%	43%	32%
...decisions enhance Canada's global competitiveness	41%	36%	38%	27%
...makes decisions that effectively protect the environment	38%	37%	37%	27%
...makes decisions in the public interest, for energy projects like new pipelines and power lines	38%	35%	37%	26%
...decisions contribute to an inclusive society	35%	31%	33%	22%
...decisions advance Reconciliation with Indigenous peoples*	31%	29%	30%	20%

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 in aspects of the CER's work

The CER ('s)...	2023 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	33%	9%	25%	41%	26%
...makes decisions that effectively ensure public safety	32%	8%	24%	42%	25%
...decisions are based on the best available scientific information and data	32%	7%	25%	40%	28%
...decisions enhance Canada's global competitiveness	27%	5%	21%	43%	30%
...makes decisions that effectively protect the environment	27%	6%	20%	41%	32%
...makes decisions in the public interest, for energy projects like new pipelines and power lines	26%	6%	21%	39%	34%
...decisions contribute to an inclusive society	22%	4%	18%	44%	34%
...decisions advance Reconciliation with Indigenous peoples*	20%	5%	15%	44%	36%

Confidence is fairly 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 on the next page.

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

Confidence	2023 Total (n=1,029)	Region						
		BC (n=159)	AB (n=149)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
The CER ensures pipeline and powerline companies comply with the relevant rules and regulations								
Net: Confident (score 7-10)	33%	38%	34%	38%	32%	33%	29%	40%
Very confident (score 9-10)	9%	12%	12%	10%	8%	5%	7%	13%
The CER's decisions enhance Canada's global competitiveness								
Net: Confident (score 7-10)	27%	26%	22%	26%	28%	29%	18%	19%
Very confident (score 9-10)	5%	5%	4%	6%	7%	4%	1%	6%
The CER makes decisions that effectively ensure public safety								
Net: Confident (score 7-10)	32%	33%	30%	36%	32%	34%	26%	40%
Very confident (score 9-10)	8%	7%	8%	14%	9%	7%	4%	7%
The CER's decisions are based on the best available scientific information and data								
Net: Confident (score 7-10)	32%	35%	23%	30%	34%	35%	20%	39%
Very confident (score 9-10)	7%	6%	6%	5%	8%	7%	4%	13%
The CER makes decisions that effectively protect the environment								
Net: Confident (score 7-10)	27%	25%	22%	29%	29%	26%	24%	32%
Very confident (score 9-10)	6%	7%	8%	11%	6%	5%	6%	7%
The CER makes decisions in the public interest, for energy projects like new pipelines and power lines								
Net: Confident (score 7-10)	26%	27%	19%	28%	27%	30%	20%	32%
Very confident (score 9-10)	6%	6%	5%	5%	7%	3%	3%	18%
The CER's decisions contribute to an inclusive society								
Net: Confident (score 7-10)	22%	21%	18%	19%	21%	29%	14%	37%
Very confident (score 9-10)	4%	6%	5%	6%	4%	3%	3%	13%
The CER's decisions advance reconciliation with Indigenous Peoples								
Net: Confident (score 7-10)	20%	20%	20%	20%	19%	23%	19%	38%
Very confident (score 9-10)	5%	8%	5%	6%	6%	3%	5%	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

Three in ten Canadians are at least somewhat confident in the CER; less than one in ten are very confident.

Canadians were asked to indicate their overall confidence in the CER, using a ten-point scale. Just over three in ten say they are at least somewhat confident in the CER (7-10 rating), which is a decrease from the past few years.

Overall confidence in the CER

Level of confidence in the CER	2021 Total (n=1012)	2022 Total (n=1,008)	2023 Total (n=1029)
Net: Confident (7-10)	43%	45%	32%
Very confident (9-10)	10%	9%	6%
Somewhat confident (7-8)	33%	36%	27%
Neutral (5-6)	39%	41%	41%
Net: Not confident (1-4)	17%	15%	27%
Not very confident (3-4)	10%	8%	15%
Not at all confident (1-2)	8%	7%	11%

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

Overall confidence in the CER

Level of confidence in the CER	2023 Total (n=1029)	BC (n=159)	AB (n=149)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
Net: Confident (7-10)	32%	30%	24%	29%	35%	37%	22%	32%
Very confident (9-10)	6%	7%	7%	6%	6%	6%	4%	7%
Somewhat confident (7-8)	27%	24%	17%	23%	30%	32%	17%	26%
Neutral (5-6)	41%	43%	38%	43%	41%	41%	44%	21%
Net: Not confident (1-4)	27%	27%	38%	28%	24%	21%	35%	46%
Not very confident (3-4)	15%	17%	18%	11%	14%	14%	23%	14%
Not at all confident (1-2)	11%	9%	20%	18%	10%	8%	12%	32%

Across regions, net confidence ranges from a low of 22 per cent in the Atlantic to a high of 37 per cent in Quebec. Overall confidence ratings are comparable across, age, income and education levels and other subgroups.

When asked why they gave the confidence ratings they did, one in ten say it is due to generally positive perceptions of the CER. These participants said they believe the CER is doing a good job and generally has a good reputation. The same proportion (10%) are confident in the CER because of mandate related reasons. They believe the CER's mandate covers important topics, like ensuring compliance, ensuring human safety, and making decisions in the public interest. About 3 percent mention having trust in government/regulation in general.

Fifteen percent explained that their rating is because they believe the CER has 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. Very few mention having negative impressions in general, or a lack of

transparency. Similar to previous years, four in ten did not have a specific reason why they gave their confidence rating.

Reasons for overall confidence in the CER - Tracking

Reason	2021 Total (n=1,012)	2022 Total (n=1,008)	2023 Total (n=1029)
Net: General Positive	16%	13%	10%
Good/good job/ competent/ trustworthy/professional/ reliable	12%	8%	7%
Positive news/ word of mouth/ reputation	3%	5%	3%
Net: Mandate related positive	12%	13%	10%
Decisions in the public interest	4%	5%	1%
Protects the environment	3%	2%	2%
Accountable/follows mandate	3%	2%	3%
Enforces regulations/ensures compliance	1%	2%	3%
Ensures human safety	1%	2%	2%
Net: Trust/pride	3%	11%	4%
I trust govt / regulators	2%	9%	3%
Canadian, therefore good	1%	2%	0%
Net: Biases	11%	8%	15%
Biased toward industry	5%	3%	7%
Not independent/politicized	5%	5%	8%
Net: Mandate related negative	7%	7%	9%
Allows environmental damage	4%	4%	5%
Doesn't protect public safety	-	1%	2%
Not advancing Reconciliation with Indigenous people	2%	2%	3%
Bad press / word of mouth / reputation	2%	2%	1%
Lacks transparency	2%	2%	1%
Decisions not good /inclusive	1%	2%	6%
Distrust government/ regulators	2%	5%	6%
Too bureaucratic/ Ineffective/ slow/"govt" organization	2%	2%	1%
DK/NA/no specific reason	44%	45%	44%

Q21B Why do you say that?

A detailed table of reasons behind overall confidence ratings by region is shown on the next page. General positive perceptions are higher in Manitoba/Saskatchewan and Quebec compared to other regions. Perceptions of bias are higher in Alberta than other provinces.

Reasons for overall confidence in the CER – by region

Reason	2023 Total (n=1029)	BC (n=159)	AB (n=149)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
Net: General Positive	10%	9%	9%	20%	8%	11%	6%	1%
Good/good job/ competent/ trustworthy/professional/ reliable	7%	6%	5%	11%	6%	9%	2%	0%
Positive news/ word of mouth/ reputation	3%	4%	3%	9%	2%	2%	4%	0%
Net: Mandate related positive	10%	13%	12%	8%	11%	7%	8%	6%
Decisions in the public interest	1%	4%	3%	-	1%	-	-	0%
Protects the environment	2%	2%	1%	-	2%	2%	2%	0%
Accountable/follows mandate	3%	4%	3%	1%	3%	1%	2%	-
Enforces regulations/ensures compliance	3%	2%	2%	3%	2%	3%	3%	-
Ensures human safety	2%	1%	2%	4%	3%	1%	-	6%
Net: Trust/pride	4%	4%	4%	4%	3%	5%	2%	1%
I trust govt / regulators	3%	4%	3%	3%	2%	5%	2%	0%
Canadian, therefore good	0%	-	1%	1%	0%	-	-	0%
Net: Biases	15%	17%	21%	14%	12%	15%	12%	7%
Biased toward industry	7%	9%	6%	6%	6%	8%	7%	1%
Not independent/politicized	8%	9%	15%	8%	6%	8%	5%	6%
Net: Mandate related negative	9%	12%	7%	8%	10%	10%	4%	8%
Allows environmental damage	5%	8%	4%	3%	3%	7%	1%	6%
Doesn't protect public safety	2%	1%	1%	2%	2%	1%	1%	0%
Not advancing Reconciliation with Indigenous people	3%	3%	2%	2%	5%	1%	1%	1%
Bad press / word of mouth / reputation	1%	2%	-	-	1%	0%	3%	-
Lacks transparency	1%	1%	1%	2%	2%	1%	2%	1%
Decisions not good /inclusive	6%	5%	9%	7%	6%	5%	3%	6%
Distrust government/ regulators	6%	5%	8%	10%	6%	5%	4%	1%
Too bureaucratic/ Ineffective/ slow/"govt" organization	1%	1%	3%	-	1%	-	1%	6%
DK/NA/no specific reason	44%	43%	33%	42%	50%	38%	56%	64%

Q21B Why do you say that?

3. Perceptions of the CER

Similar to previous years, six in ten or more say each of four attributes at least somewhat describes the CER; it most commonly 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. Although there has been a slight decline, the trend among the five terms remains consistent with previous results. Canadians are most likely (72%) to think that “Expert” at least somewhat describes the CER. Over half also perceive the CER to be fair, timely and transparent. Opinions are generally similar across regions, but residents of Quebec are among the most likely to say that the CER is timely, an expert, and inclusive.

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)	2023 Total (n=1029)	Region						
					BC (n=159)	AB (n=149)	MB/SK (n=98)	ON (n=216)	QC (n=215)	ATL (n=90)	TERR (n=102)
Expert											
Net: Describes	78%	77%	76%	72%	70%	60%	65%	75%	75%	70%	41%
Fully describes	21%	20%	17%	14%	15%	11%	11%	10%	24%	9%	18%
Fair											
Net: Describes	69%	68%	69%	61%	58%	57%	57%	61%	66%	59%	58%
Fully describes	11%	12%	12%	7%	7%	6%	6%	6%	11%	6%	18%
Timely											
Net: Describes	64%	64%	63%	54%	51%	41%	46%	53%	67%	48%	39%
Fully describes	10%	9%	10%	6%	3%	3%	5%	7%	11%	2%	6%
Inclusive*											
Net: Describes	N/A	64%	65%	58%	56%	49%	51%	58%	66%	52%	50%
Fully describes	N/A	10%	11%	7%	5%	8%	8%	5%	9%	7%	12%
Open and transparent to the public											
Net: Describes	61%	60%	59%	49%	46%	46%	44%	49%	56%	48%	39%
Fully describes	11%	10%	10%	5%	6%	4%	5%	4%	8%	2%	6%

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.

There are no clear patterns in these results by income level age or gender. The perception that the terms timely and transparent to the public fully describes the CER is highest among those who are familiar with the CER.

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, similar to 2022.

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. Although this is substantially lower than 2021 and 2020 levels,¹ this proportion is consistent with 2022 results. Awareness levels are generally similar across the country, with Quebec below average and the Territories above.

Awareness of recent information on pipelines/powerline projects – tracking

Have seen/heard/read anything recently	2020 Total (n=1,002)	2021 Total (n=1,012)	2022 Total (n=1,008)	2023 Total (n=1,029)
Yes (have recent awareness)	62%	58%	34%	33%
No (no recent awareness)	38%	42%	66%	67%

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 retired people (39%) and those who have completed university (39%). It is higher among men (39% vs. 27% of women) and those who had heard of the CER prior to the survey (49%) than those who had not (27%).

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

Have seen/heard/read anything recently	2023 Total (n=1,029)	Region						
		BC (n=151)	AB (n=146)	MB/SK (n=94)	ON (n=201)	QC (n=201)	ATL (n=104)	TERR (n=102)
Yes (have recent awareness)	33%	39%	38%	42%	32%	28%	24%	46%
No (no recent awareness)	67%	61%	62%	58%	68%	72%	76%	53%

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. A larger proportion than previous years reports learning about energy projects from major city and national newspapers.

Those who indicated they had recent awareness of pipelines or powerlines information (n=363) were asked where they got this information. 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 six in ten. Three in ten report seeing this information in a major newspaper, and one in four for radio and social media.

Where saw/heard recent project energy information– tracking

Where saw/heard energy project information	2020 Total (n=635)	2021 Total (n=598)	2022 Total (n=353)	2023 Total (n=363)
On TV	70%	72%	76%	61%
Social media (general)	31%	22%	21%	22%
On radio	29%	21%	23%	25%
On a website	28%	23%	16%	24%
Major city or national (daily) newspaper	25%	25%	29%	34%
Word of mouth	20%	14%	13%	16%
Local community/weekly newspaper	17%	11%	9%	14%
Other	<1%	1%	1%	1%
I don't recall / DK/NA	<1%	<1%	<1%	1%

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

BASE: Those who saw/heard something recently about pipeline/powerline projects (n=363)

Where saw/heard recent project energy information– by region

Where saw/heard energy project information	2023 Total (n=363)	Region						
		BC (n=64)	AB (n=57)	MB/SK (n=41)*	ON (n=70)	QC (n=61)*	ATL (n=22)*	TERR (n=48*)
On TV	61%	56%	53%	57%	63%	68%	73%	18%
Social media (general)	22%	25%	35%	31%	22%	7%	31%	27%
On radio	25%	26%	19%	24%	24%	30%	32%	15%
On a website	24%	25%	32%	34%	23%	13%	32%	15%
Major city or national (daily) newspaper	34%	33%	30%	23%	43%	24%	31%	0%
Word of mouth	16%	24%	18%	15%	18%	8%	9%	27%
Local community/weekly newspaper	14%	22%	19%	17%	13%	2%	18%	2%
Other	1%	1%	2%	4%	1%	-	-	1%
I don't recall / DK/NA	1%	1%	-	-	-	2%	-	13%

*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+ (76%) and those who are retired (79%). Seeing related information in a major newspaper is higher among Ontarians (43%).

3. Source of recent energy project information

According to Canadians, the government was the top source of the recent information they heard about pipelines/powerlines; one in ten specifically name the Canada Energy Regulator.

Those who had recent awareness of pipelines or powerlines information (n=363) were asked about the source of the information. Answer categories were provided online and suggestions read on the telephone. Multiple responses were permitted and respondents could include answers not listed.

As in previous years, the government is the top source, cited by over two in five (46%), followed by environmental groups (38%) energy companies (30%), and industry groups (21%). One in ten name the CER as their source, down slightly from 2022 and comparable to 2021. Fewer than one in ten indicate other sources of pipeline or powerline information.

Source of recent energy project information– tracking

Information source	2020 Total (n=635)	2021 Total (n=598)	2022 Total (n=353)	2023 Total (n=363)
Government	52%	58%	46%	45%
Environmental groups	41%	21%	35%	38%
Energy companies	24%	21%	26%	30%
Canada Energy Regulator/CER	19%	11%	16%	10%
Industry groups	16%	13%	16%	21%
News reports (various)	8%	9%	5%	6%
Indigenous groups	2%	<1%	1%	1%
Word of mouth	<1%	<1%	<1%	<1%
Other	<1%	1%	2%	1%
I don't recall / DK/NA	6%	5%	5%	6%

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 Regular 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=363)

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

Source of recent energy project information– by region

Information source	2023 Total (n=363)	Region						
		BC (n=64)	AB (n=57)	MB/SK (n=41)*	ON (n=70)	QC (n=61)	ATL (n=22)*	TERR (n=48*)
Government	45%	43%	40%	39%	40%	56%	68%	15%
Environmental groups	38%	36%	47%	33%	39%	35%	41%	15%
Energy companies	30%	24%	43%	26%	29%	21%	59%	0%
Canada Energy Regulator/CER	10%	7%	11%	3%	10%	13%	18%	0%
Industry groups	21%	29%	38%	22%	18%	8%	27%	0%
News reports (various)	6%	5%	7%	8%	7%	3%	4%	25%
Indigenous groups	1%	-	-	2%	2%	-	-	1%
Word of mouth	<1%	-	2%	-	-	-	-	0%
Other	1%	-	2%	2%	1%	2%	-	0%
I don't recall / DK/NA	6%	13%	5%	7%	4%	3%	9%	55%

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

Responses are generally similar across Canada and most subgroups with base sizes over 50.

Driver analysis: understanding overall confidence in the CER

In 2021, Environics started conducting 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.

Similar to prior years, 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 (%)		
		2021	2022	2023
1st Tier	Belief in CER's decision making	66%	65%	74%
Factors	The CER makes decisions in the public interest	8%	11%	11%
	The CER makes decisions that effectively ensure public safety	8%	9%	8%
	The CER's decisions are based on the best available scientific information and data	8%	9%	11%
	The CER makes decisions that effectively protect the environment	9%	8%	9%
	The CER ensures compliance with relevant rules and regulations	9%	7%	8%
	The CER's decisions contribute to an inclusive society	8%	7%	9%
	The CER's decisions advance Reconciliation with Indigenous Peoples	8%	7%	8%
	The CER's decisions enhance Canada's global competitiveness	8%	7%	10%
2nd Tier	CER Attributes	22%	22%	18%
Factors	Fair	7%	7%	7%
	Open and transparent	8%	6%	6%
	Expert	4%	6%	4%
	Inclusive	6%	5%	4%
	Timely	4%	5%	4%
3rd Tier	Interest in learning more	1%	2%	0%
	Familiarity/awareness	2%	2%	0%

Nearly 75 percent of the variance in Canadian’s overall level of confidence in the CER is impacted by their beliefs about its decision making, an increase in the past few years. Views about the CER’s attributes drive 18 percent of confidence. In previous years, interest in learning more, familiarity with the CER and awareness of recent energy projects together did have a modest impact on confidence in the CER. This year, the driver analysis showed that these factors do not contribute to confidence in the CER.

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 927 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-dialling techniques.

The survey obtained the following regional distribution:

Target Group	Proportion of Population	Target (Quota)	Actual Unweighted	Actual Weighted*
Total	100%	1,000	1,029	1,029
Atlantic	6.5%	100	90	68
Quebec	23%	200	215	239
Ontario	38.5%	200	216	394
MB/SK	6.7%	100	98	70
Alberta	11.5%	150	149	119
BC	13.5%	150	159	137
Territories	<1%	100	102	2

*Results are weighted by region, gender and age to 2021 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 and 2023. 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 field, a pre-test (soft launch) was conducted in English and French. The pre-test assessed the questionnaires in terms of question wording and sequencing, respondent sensitivity to specific questions and to the survey overall, and to determine the survey length; standard Government of Canada pre-testing questions were also asked.

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 from February 1-13, 2023. 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 while the online survey was in field, from February 1-13, 2023.

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 invitations (c)	29450
Total completes (d)	927
Qualified breakoffs (e)	170
Disqualified (f)	140
Not responded (g)	26703
Quota filled (h)	1510
Contact rate (d+e+f+h)/c	9.33%
Participation rate [(d+f+h)/c	8.75%

Contact disposition – telephone survey

Disposition of calls	TOTAL
Total sample dialed	4568
Unresolved numbers (U)	3199
Busy	263
No answer	1361
Voicemail	1575
Resolved numbers (<i>Total minus Unresolved</i>)	1369
Out of scope (Invalid/non-eligible)	471
Non-household	16
Not-in-service	441
Fax/modem	14
In-scope non-responding (IS)	737
Refusals – household	142
Refusals – respondent	294
Language barrier	34
Callback missed/respondent not available/ill	254
Break-offs (interview not completed)	13
In-scope - responding (R)	161
Disqualified	59
Quota filled	0
Completed	102
Response rate [R / (U + IS + R)]	3.93

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	14
Trades/some post sec	16
College	21
University graduate/post-graduate	49
Employment status	
Full time/self employed	56
Part time	6
Not employed (student, unemployed, homemaker etc.)	10
Retired	28
Total annual household income	
Under \$40,000	16
\$40,000-<\$80,000	29
\$80,000-<\$100,000	16
\$100,000+	39
Language spoke most at home	
English	77
French	22
Other	6

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2021 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 (2021 Census)
Gender (18+)		
Male	49%	49%
Female	51%	51%
Age		
18-34	27%	21%
35-49	25%	20%
50-64	25%	21%
65+	25%	19%
Education level ^α		
High school diploma or less	14%	35%
Trades/college/post sec no degree	37%	36%
University degree	49%	29%

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

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

Appendix B: Quantitative research instrument

Environics Research Group
February 2023

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 **20230127-EN772**.

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 **20230127-EN772**.

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 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

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.