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Régie de l'énergie
du Canada

Annual Public Opinion Research Measures 2024

Final Report

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Canada Energy Regulator – Annual Public Opinion Research Measures 2024

Final report

Prepared for Canada Energy Regulator by Environics Research

March 2024

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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 18 to 29, 2024.

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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 fifth annual tracking study in early 2024. The CER uses 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. As a tracking survey, the questionnaire remains largely unchanged year over year. However, this year the CER sought a deeper understanding of Canadians who are most engaged with the topic, resulting in the addition of some new questions in the 2024 questionnaire.

2. Methodology

Environics Research surveyed 1,038 Canadian adults (aged 18 years and older) between January 18-29, 2024. The sample included 921 Canadians from the provinces who are members of an online panel. To reach Canadians in the northern territories, Environics completed 107 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 | 1,038 | 1,038 |
| Atlantic | 6.5% | 100 | 103 | 67 |
| Quebec | 23% | 200 | 206 | 239 |
| Ontario | 38.5% | 200 | 208 | 400 |
| MB/SK | 6.7% | 100 | 104 | 69 |
| Alberta | 11.5% | 150 | 155 | 119 |
| BC | 13.5% | 150 | 155 | 140 |
| Territories | <1% | 100 | 107 | 3 |

*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 \$69,930 (excluding HST).

4. Key findings

Awareness of recent energy or pipeline projects is on a declining trend with just under three in ten saying they have recently heard about the topic. Consistent with previous results, the government is the most common source of information on recent energy projects.

When it comes to personal connections or experience, fewer than one in ten have had first-hand experience working in the Canadian oil and gas industry, larger portions are aware of local energy transmission infrastructure and very few are members of the affected public, meaning they report living near energy transmission infrastructure. Three quarters of Canadians think pipelines are at least somewhat safe; one quarter think they are unsafe. Positive opinions of pipeline safety are highest in Alberta and lowest in the Territories.

Similar to 2023 results, three in ten express awareness of the CER either prompted or unprompted. However, the CER is not a household name, and the majority cannot name an organization responsible for the CER's mandate. Among those who have heard of the CER, two in ten are at least moderately familiar with the organization overall; fewer than one in ten are very familiar. This is also lower than past results. Familiarity with the CER's work is also higher among those with industry experience, those aware of infrastructure, and those who live near infrastructure. Most Canadians cannot recall having any direct interaction with the CER in recent years. Thinking about specific functions the CER carries out, Canadians are most familiar with the Safety & Environment Oversight function, followed by Energy Adjudication. Canadians continue to perceive the CER as an expert in its field, with six in ten saying this term describes the organization.

Overall confidence in the CER remains at steady with 2023 results; about three in ten Canadians feel at least somewhat confident in the organization. About one third of Canadians are also confident the CER ensures compliance and protects public safety. These results are comparable to confidence levels in 2023, but lower than results from 2020-2022. Those who believe pipelines are very safe are more likely to also be very confident in the CER. Confidence in decision making aspects of the CER's work is also typically higher among those who have had recent interaction with the CER.

Key drivers of confidence in the CER are related to the public's belief about its decision making.

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 fifth annual public opinion tracking study in early 2024. Environics Research has been conducting this annual study since 2020. These five 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 uses 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, recent interaction with the CER, experience in the industry, and awareness of and proximity to energy infrastructure, as well as views on pipeline safety). 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=1,038 unless otherwise specified.

Detailed findings

Awareness of pipeline and powerline projects

1. Awareness of recent pipeline/powerline projects in Canada

About three in ten Canadians say they have seen, heard, or read anything about pipeline or powerline projects in the country. Awareness of these projects continues to decline among Canadians.

Just under three in ten Canadians recall hearing about an existing or proposed pipeline or powerline project in Canada. These results are comparable to the past few years. However, looking at the trend data from 2020 reveals a consistent decline in awareness of these projects. Awareness levels are generally similar across the country, with awareness being above average in the Territories (47%).

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) | 2024 Total (n=1,038) |
|--|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| Yes (have recent awareness) | 62% | 58% | 34% | 33% | 29% |
| No (no recent awareness) | 38% | 42% | 66% | 67% | 71% |

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

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

| Have seen/heard/read anything recently | 2024 Total (n=1,038) | Region | | | | | | |
|--|----------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| | | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
| Yes (have recent awareness) | 29% | 39% | 42% | 28% | 25% | 28% | 20% | 47% |
| No (no recent awareness) | 71% | 61% | 58% | 72% | 75% | 72% | 80% | 48% |

Awareness of recent pipeline and powerline projects is higher among those earning household incomes greater than \$150K (39%), older Canadians aged 55+ (38%) and those who have completed college or university (31%). It is higher among men (33% vs. 25% of women).

2. Where Canadians heard/saw recent energy project information

Canadians are still most likely to have seen or heard about pipeline/powerline projects on TV. Major city and national newspapers, websites and social media are other top sources.

Those who indicated they had recent awareness of pipelines or powerlines information (n=330) 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 nearly six in ten (57%). Results are fairly similar across the country. Hearing about pipelines on TV is more common among Canadians aged 55+ (69%) and those who are aware of infrastructure (63%). Similar to 2023, three in ten report seeing this information in a major newspaper and one in four say 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) | 2024 Total (n=330) |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| On TV | 70% | 72% | 76% | 61% | 57% |
| Major city or national (daily) newspaper | 25% | 25% | 29% | 34% | 31% |
| On a website | 28% | 23% | 16% | 24% | 24% |
| Social media (general) | 31% | 22% | 21% | 22% | 23% |
| On radio | 29% | 21% | 23% | 25% | 20% |
| Word of mouth | 20% | 14% | 13% | 16% | 15% |
| Local community/weekly newspaper | 17% | 11% | 9% | 14% | 10% |
| Other | <1% | 1% | 1% | 1% | 1% |
| I don't recall / DK/NA | <1% | <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=330)

Where saw/heard recent project energy information– by region

| Where saw/heard energy project information | 2024 Total (n=330) | Region | | | | | | |
|--|--------------------|-----------|-----------|---------------|-----------|-----------|-------------|-------------|
| | | BC (n=59) | AB (n=64) | MB/SK (n=28)* | ON (n=51) | QC (n=57) | ATL (n=20)* | TERR (n=51) |
| On TV | 57% | 61% | 55% | 64% | 48% | 61% | 81% | 27% |
| Major city or national (daily) newspaper | 31% | 27% | 31% | 14% | 35% | 32% | 35% | 16% |
| On a website | 24% | 30% | 31% | 14% | 22% | 20% | 16% | 15% |
| Social media (general) | 23% | 24% | 32% | 20% | 24% | 16% | 18% | 14% |
| On radio | 20% | 22% | 13% | 4% | 15% | 31% | 31% | 28% |
| Word of mouth (friends, family, etc.) | 15% | 17% | 19% | 18% | 10% | 18% | 10% | 1% |
| Local community/weekly newspaper | 10% | 20% | 8% | 17% | 8% | 5% | 5% | 14% |
| Other | 1% | 0% | 2% | 4% | 0% | 0% | 0% | 0% |
| I don't recall / DK/NA | <1% | 2% | 0% | 0% | 0% | 0% | 0% | 9% |

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

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 six specifically name the Canada Energy Regulator as their source.

Those who had recent awareness of pipelines or powerlines information (n=330) were also asked to identify 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.

The government remains the top source, cited by two in five (43%), followed by environmental groups (35%) energy companies (26%). This order follows the same trend as previous years. One in six (16%) name the CER as their source, up from 2023 and on par with 2022 results. Results are generally similar across the country.

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) | 2024 Total (n=330) |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Government | 52% | 58% | 46% | 45% | 43% |
| Environmental groups | 41% | 21% | 35% | 38% | 35% |
| Energy companies | 24% | 21% | 26% | 30% | 26% |
| Canada Energy Regulator/CER | 19% | 11% | 16% | 10% | 16% |
| Industry groups | 16% | 13% | 16% | 21% | 16% |
| News reports (incl. media reports/ TV channels, journalists) | 8% | 9% | 5% | 6% | 11% |
| Word of mouth | <1% | <1% | <1% | <1% | 1% |
| Indigenous groups | 2% | <1% | 1% | 1% | <1% |
| Other | <1% | 1% | 2% | 1% | 1% |
| I don't recall / DK/NA | 6% | 5% | 5% | 6% | 8% |

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=330)

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

Source of recent energy project information – by region

| Information source | 2024 Total (n=330) | Region | | | | | | |
|-----------------------------|--------------------------|--------------|--------------|------------------|--------------|--------------|----------------|----------------|
| | | BC (n=59) | AB (n=64) | MB/SK (n=28)* | ON (n=51) | QC (n=57) | ATL (n=20)* | TERR (n=51) |
| Government | 43% | 37% | 44% | 36% | 48% | 47% | 31% | 14% |
| Environmental groups | 35% | 37% | 25% | 42% | 37% | 38% | 30% | 8% |
| Energy companies | 26% | 34% | 38% | 25% | 19% | 25% | 19% | 10% |
| Canada Energy Regulator/CER | 16% | 21% | 16% | 21% | 12% | 16% | 14% | <1% |
| Industry groups | 16% | 19% | 23% | 10% | 12% | 11% | 40% | 9% |
| News reports (various) | 11% | 17% | 4% | 7% | 8% | 14% | 20% | 32% |
| Word of mouth | 1% | 2% | 2% | 0% | 0% | 0% | 0% | 0% |
| Indigenous groups | <1% | 0% | 2% | 0% | 0% | 0% | 0% | 0% |
| Other | 1% | 1% | 0% | 0% | 2% | 2% | 0% | 1% |
| I don't recall / DK/NA | 8% | 9% | 17% | 15% | 4% | 6% | 10% | 26% |

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

Connection to industry and views on pipelines

1. Personal connections to the industry

Although a small minority (7%) of Canadians have first-hand experience working in the Canadian oil and gas industry, larger portions are aware of local energy transmission infrastructures. Very small proportions are members of the affected public. Personal connections are higher in BC and Alberta and in the Territories.

This year Canadians were also asked new questions to provide an understanding of any personal connections they might have to the energy industry in Canada. Overall, less than one in ten (7%) have worked in the oil and gas industry. Experience in this industry is much higher in Alberta (23%) than other regions. Awareness of any energy transmission infrastructure (i.e. pipelines or powerlines) whether it is completed, underway, or planned sits at nearly three in ten (28%). Awareness of energy transmission infrastructure is higher in British Columbia (51%) and Alberta (50%) and lower in Ontario (17%). Canadians who are aware of this type of infrastructure (n=329) were asked whether they live near any of the pipelines or powerlines. A small minority of the total population say they live near energy transmission infrastructure. This group can be considered members of the affected public. Higher proportions of the affected public are in the Alberta and British Columbia.

Personal Connections to the industry (New Questions 2024)

| | 2024 Total (n=1,038) | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
|-----------------------------|----------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| Industry Experience | | | | | | | | |
| Yes | 7% | 9% | 23% | 7% | 4% | 3% | 11% | 9% |
| No | 93% | 91% | 77% | 93% | 96% | 97% | 89% | 91% |
| Infrastructure Aware | | | | | | | | |
| Yes | 28% | 51% | 50% | 28% | 17% | 20% | 29% | 29% |
| No | 72% | 49% | 50% | 72% | 83% | 80% | 71% | 66% |
| Not Sure | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 5% |
| Affected Public* | | | | | | | | |
| Yes | 7% | 20% | 7% | 5% | 5% | 3% | 5% | 12% |
| No | 21% | 31% | 43% | 24% | 12% | 17% | 24% | 17% |
| Not aware | 72% | 49% | 50% | 72% | 83% | 80% | 71% | 66% |

Q29A Have you worked in the oil and gas industry?

Q29B Are you aware of any energy transmission infrastructure such as pipelines or powerlines that cross a national, provincial or territorial border in your region – completed, underway or planned?

Q29C If yes, do you live near any of them? *Note: this question was asked only of those who are aware of energy transmission infrastructure in their region. For consistency, this data is presented as a proportion of the total sample.

2. Views on pipeline safety

Three quarters of Canadians think pipelines are at least somewhat safe; one quarter think they are unsafe. Positive opinions of pipeline safety are highest in Alberta and lowest in the Territories.

Canadians were asked whether they think pipelines are generally safe or unsafe. Three quarters view pipelines as at least somewhat safe, with two in ten saying pipelines are very safe. One quarter think pipelines unsafe, with less than one in ten (7%) saying they are not safe at all. Views on pipeline safety vary across the country with Albertans and those in the Atlantic region being more likely to think pipelines are safe. Residents of Quebec and the Territories are more likely to view pipelines as unsafe.

Pipeline Safety (New Question 2024)

| Do you think pipelines are safe or unsafe? | 2024 Total (n=1,038) | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
|--|----------------------|------------|------------|---------------|------------|------------|-------------|--------------|
| NET: Safe | 75% | 76% | 86% | 77% | 77% | 62% | 82% | 59% |
| Very safe | 20% | 20% | 40% | 25% | 18% | 10% | 26% | 21% |
| Somewhat safe | 55% | 56% | 47% | 52% | 59% | 53% | 56% | 38% |
| NET: Not safe | 25% | 24% | 14% | 23% | 23% | 38% | 18% | 30% |
| Not very safe | 18% | 18% | 11% | 16% | 16% | 29% | 13% | 15% |
| Not at all safe | 7% | 6% | 3% | 7% | 7% | 9% | 5% | 15% |

Q29D In general, do you think pipelines are safe or unsafe?

Awareness of and familiarity with the CER

1. Unaided awareness of the CER

The proportion of Canadians who cannot name an organization responsible for the CER's mandate continues on an increasing trend. Nearly nine in ten (87%) cannot name the CER unprompted.

Canadians were asked if they know the organization responsible for the CER's mandate of overseeing oil and gas pipelines and electrical powerlines crossing a national, provincial, or territorial border in Canada. Nearly nine in ten (87%) are unable to name an organization with this mandate, consistent with 2023 results and higher than previous waves. Four percent named the CER, consistent with the previous year. Unaided mentions of the NEB remain low at one per cent or less.

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=1,029) | 2024 Total (n=1,038) |
|---|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| NET: Canada Energy Regulator | 1% | 3% | 3% | 5% | 4% |
| Canada Energy Regulator | 1% | 2% | 2% | 2% | 2% |
| Canadian Energy Regulator | <1% | <1% | <1% | 1% | 2% |
| CER | 0% | 1% | <1% | 2% | 1% |
| Hydro (incl. provincial) | 2% | 2% | 2% | 1% | 4% |
| National Energy Board/ NEB | 6% | 2% | 2% | 1% | 1% |
| Federal government department (various) | 2% | 2% | 1% | 1% | 1% |
| TransCanada/TCPL/TC Energy | 1% | 1% | 1% | <1% | 1% |
| Pipeline (i.e. Trans Mountain) | 2% | 2% | <1% | 0% | <1% |
| Commission/board (various) | 1% | 1% | 1% | <1% | <1% |
| Private companies (other) | 2% | 2% | <1% | <1% | 0% |
| Other mentions (<1% each) | 3% | 2% | 4% | 2% | 2% |
| Don't know | 79% | 81% | 83% | 86% | 87% |

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 | 2024 Total (n=1,038) | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
|------------------------------|----------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| NET: Canada Energy Regulator | 4% | 4% | 5% | 2% | 3% | 4% | 5% | <1% |
| Canada Energy Regulator | 2% | 2% | 4% | 1% | 2% | 0% | 2% | 0% |

| | | | | | | | | |
|---|-----|-----|-----|-----|-----|-----|-----|-----|
| Canadian Energy Regulator | 2% | 2% | 4% | 1% | 2% | 0% | 2% | 0% |
| CER | 1% | 2% | 1% | 0% | 0% | 1% | 2% | 0% |
| Hydro (incl. provincial) | 4% | 3% | 2% | 3% | 5% | 4% | 2% | 1% |
| National Energy Board/NEB | 1% | 2% | 3% | 2% | 1% | <1% | 1% | 2% |
| Federal government department (various) | 1% | 1% | 1% | <1% | 1% | 1% | 2% | 1% |
| TransCanada/TCPL/TC Energy | 1% | 2% | 1% | 1% | <1% | <1% | 0% | 0% |
| Pipeline (i.e. Trans Mountain) | <1% | 1% | 1% | <1% | <1% | <1% | <1% | <1% |
| Commission/board (various) | <1% | <1% | <1% | 1% | <1% | <1% | 1% | <1% |
| Private companies (other) | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Other mentions (<1% each) | 2% | 2% | 4% | 0% | 2% | 1% | 2% | 1% |
| Don't know | 87% | 86% | 83% | 92% | 87% | 90% | 87% | 96% |

As shown in the table above, unaided awareness of the CER is generally similar across the country. Not knowing the CER is more common in the Territories (96%) and in Manitoba and Saskatchewan (92%). Being able to name the CER is higher in Alberta and the Atlantic provinces (5% each). Unaided awareness is also higher among those who indicate awareness of pipeline infrastructure and recent energy projects (8% vs 2% unaware).

2. Total awareness of the CER

Total awareness of the CER remains stable. Three in ten Canadians express awareness (aided or unaided) of the CER in 2024.

Canadians who were unable to name the CER in the previous question were provided with a description of the organization and its mandate. When prompted, about a quarter (26%) say they heard of the CER before taking the survey; seven in ten have not. Total unaided and aided awareness is consistent with 2023 results but still lower compared to results before 2023.

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=1,029) | 2024 Total (n=1,018) |
|----------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Net: Aware | 41% | 41% | 36% | 31% | 30% |
| Unaided awareness | 1% | 3% | 3% | 5% | 4% |
| Aided awareness | 40% | 38% | 33% | 26% | 26% |
| No awareness | 59% | 59% | 64% | 69% | 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=1,001)

Total awareness of CER – by region

| Total awareness of the CER | 2024 Total (n=1,018) | Region | | | | | | |
|----------------------------|-------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| | | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
| Net: aware | 30% | 27% | 48% | 31% | 21% | 37% | 29% | 18% |
| Unaided awareness | 4% | 4% | 5% | 2% | 3% | 4% | 5% | <1% |
| Aided awareness | 26% | 23% | 43% | 29% | 18% | 33% | 24% | 18% |
| No awareness | 70% | 73% | 52% | 69% | 79% | 63% | 71% | 82% |

In this wave, total awareness ranges from a low of 18 per cent in the Territories to a high of 48 per cent in Alberta. Prompted awareness of the CER is higher among Albertans (43% vs 26% total), men (32% vs 21% women), those aged 55+ (37%), and those who indicated awareness of pipeline projects (46% vs 19% who are unaware of pipeline infrastructure).

3. Aided awareness of the National Energy Board

Among those who are not aware of the CER, awareness of the NEB falls to under three in ten.

Some respondents have never heard of the CER even after prompting (n=722). These respondents were asked if they had heard of it under its previous name, the National Energy Board or NEB. This year less than three in ten express awareness of the NEB, a decline from previous years.

Aided awareness of the NEB among those not aware of the CER (n=722) – Tracking

| Heard of NEB before survey | 2020 Total (n=599) | 2021 Total (n=614) | 2022 Total (n=655) | 2023 Total (n=723) | 2024 Total (n=722) |
|----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Yes, have heard of NEB | 45% | 39% | 38% | 38% | 29% |
| No, have not heard of NEB | 55% | 61% | 62% | 62% | 71% |

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=722)

Aided awareness of the NEB among those not aware of the CER (n=722) – by region

| Heard of NEB before survey | 2024 Total (n=722) | Region | | | | | | |
|----------------------------|--------------------------|---------------|--------------|-----------------|---------------|---------------|---------------|----------------|
| | | BC (n=116) | AB (n=84) | MB/SK (n=73) | ON (n=165) | QC (n=132) | ATL (n=75) | TERR (n=77) |
| Yes, have heard of NEB | 29% | 37% | 32% | 33% | 31% | 16% | 37% | 34% |
| No, have not heard of NEB | 71% | 63% | 68% | 67% | 69% | 84% | 63% | 66% |

Similar to previous years, awareness of the NEB (presented in the French version as the *l'Office national de l'énergie*) remains notably lower in Quebec than other regions. Recall of the NEB is higher among Canadians aged 55 and older (44%) and is higher among men (39%, vs. 21% of women), those who have heard of energy projects (58%), and those who are also aware of pipeline infrastructure (53%).

4. Familiarity with the CER

Two in ten who are aware of the CER say they are at least moderately familiar with it, an increase since 2023.

Those who had heard of the CER prior to the survey (n=316) were asked to indicate, using a scale of 1 to 10, how familiar they are with the organization. This year two in ten are at least somewhat familiar (20% scoring from 7 to 10), while more are unfamiliar (55% scoring 1 to 4). These results demonstrate an increase from last year, bringing reported familiarity with the CER closer to but still lower than previous waves.

Familiarity with the CER among those who have heard of it (n=316) – Tracking

| Level of familiarity with CER | 2020 Total (n=403) | 2021 Total (n=398) | 2022 Total (n=353) | 2023 Total (n=306) | 2024 Total (n=316) |
|---------------------------------|-----------------------|-----------------------|-----------------------|--------------------------|--------------------------|
| Net: familiar (score 7-10) | 31% | 28% | 33% | 12% | 20% |
| Very familiar (score 9-10) | 8% | 6% | 5% | 1% | 6% |
| Somewhat familiar (score 7-8) | 23% | 22% | 27% | 11% | 14% |
| Neutral (score 5-6) | 33% | 27% | 29% | 29% | 25% |
| Net: not familiar (score 1-4) | 36% | 45% | 38% | 60% | 55% |
| Not very familiar (score 3-4) | 20% | 27% | 26% | 32% | 26% |
| Not at all familiar (score 1-2) | 16% | 18% | 12% | 28% | 29% |
| Mean | 5.2 | 4.9 | 5.2 | 3.9 | 4.2 |

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=316)

Familiarity with the CER among those who have heard of it (n=316) – By region

| Level of familiarity with CER | 2024 Total (n=316) | Region | | | | | | |
|---------------------------------|--------------------|------------|-----------|---------------|------------|-----------|-------------|--------------|
| | | BC (n=39*) | AB (n=71) | MB/SK (n=31*) | ON (n=43*) | QC (n=74) | ATL (n=28*) | TERR (n=30*) |
| Net: familiar (score 7-10) | 20% | 11% | 18% | 20% | 33% | 11% | 27% | 4% |
| Very familiar (score 9-10) | 6% | 3% | 1% | 4% | 12% | 3% | 13% | 3% |
| Somewhat familiar (score 7-8) | 14% | 8% | 16% | 17% | 21% | 8% | 14% | 0% |
| Neutral (score 5-6) | 25% | 25% | 31% | 26% | 23% | 22% | 27% | 13% |
| Net: not familiar (score 1-4) | 55% | 63% | 51% | 53% | 44% | 67% | 46% | 83% |
| Not very familiar (score 3-4) | 26% | 30% | 34% | 37% | 14% | 32% | 14% | 18% |
| Not at all familiar (score 1-2) | 29% | 34% | 17% | 17% | 30% | 35% | 32% | 65% |
| Mean | 4.2 | 3.7 | 4.4 | 4.5 | 4.8 | 3.7 | 4.7 | 2.7 |

*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, two in ten are at least moderately familiar with each of its main functions; fewer than one in ten are very familiar.

Those who indicated awareness of the CER, aided or unaided (30%) were provided with information about the four key functions of the CER. They were asked how familiar they are with each of the four functions, using a ten-point scale. Consistent with past results, respondents express greater familiarity with Safety and Environment Oversight (24% net familiar, scoring 7-10).

Familiarity with CER functions - those aware of the CER (n=316)

| Function | Very familiar (9-10) | Somewhat familiar (7-8) | Neutral (5-6) | Not very familiar (3-4) | Not at all familiar (1-2) |
|----------------------------------|----------------------|-------------------------|---------------|-------------------------|---------------------------|
| Engagement | 6% | 14% | 26% | 24% | 31% |
| Safety and Environment Oversight | 5% | 19% | 29% | 21% | 27% |
| Energy Information | 5% | 15% | 26% | 25% | 28% |
| Energy Adjudication | 4% | 18% | 26% | 25% | 27% |

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=316)

Among those aware of the CER, reported familiarity with its main functions is higher than in 2023 but still 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) | 2024 Total (n=316) |
|--------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Safety & Environment Oversight | 33% | 27% | 38% | 18% | 24% |
| Energy Adjudication | 33% | 26% | 40% | 19% | 22% |
| Energy Information | 29% | 26% | 36% | 16% | 21% |
| Engagement | 31% | 24% | 36% | 13% | 20% |

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=316)

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

| Net familiar (score 7-10) | 2024 Total (n=316) | Region | | | | | | |
|--------------------------------|--------------------------|---------------|--------------|------------------|--------------|--------------|----------------|-----------------|
| | | BC (n=39*) | AB (n=71) | MB/SK (n=31*) | ON (n=43) | QC (n=59) | ATL (n=28*) | TERR (n=30*) |
| Safety & Environment Oversight | 24% | 24% | 27% | 31% | 26% | 19% | 20% | 17% |
| Energy Adjudication | 22% | 27% | 24% | 24% | 25% | 15% | 26% | 9% |
| Energy Information | 21% | 18% | 18% | 24% | 28% | 15% | 24% | 3% |
| Engagement | 20% | 19% | 22% | 31% | 26% | 11% | 16% | 13% |

Similar to previous results, reported familiarity with most of these functions is somewhat higher among those who are university educated. Reported familiarity is also higher among those who indicate awareness of recent energy projects and pipeline infrastructure.

6. Interactions with the CER

Most Canadians cannot recall having interacted with the CER in the past three years.

Canadians were asked to recall whether they or any members of their household have directly interacted with the CER in the past three years. Most Canadians do not remember any recent direct interactions with the CER. Results are fairly consistent across the country with no clear patterns by age, gender, or income. Those with industry experience and awareness of infrastructure are among the most likely to have had a recent interaction with the CER. The few who have interacted with the organization in the past three years say it was through looking at the CER website.

Direct Interactions with the CER (New Question 2024)

| Have interacted with the CER in the past three years | 2024 Total (n=1,038) | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
|--|----------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| Yes | 3% | 2% | 1% | 4% | 3% | 3% | 2% | 5% |
| No | 97% | 98% | 99% | 96% | 97% | 97% | 98% | 88% |

Q26A In the past three years, have you or any members of your household directly interacted with the CER?

Type of Interactions with the CER (New Question 2024)

| Interaction Type | N=29* |
|-----------------------|-------|
| Looked at CER website | 25% |
| None of the above | 75% |

Q26A If yes, in the past three years which of the following best describes your interaction(s) with the CER?

Base: Those who have interacted with the CER in the past three years (n=29)

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

Confidence in and perceptions of the CER

1. Confidence in the CER

Just over 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 describing key aspects of the CER's work. For each statement, they indicated their level of confidence using a ten-point scale. Overall, confidence of the various aspects (scoring 7 to 10) is slightly higher than in 2023, but still low compared to previous years. Roughly three in ten 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. These results are similar to 2023 results.

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) | 2024 Net: confident (7-10) |
|---|----------------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|
| ...ensures pipeline/powerline companies comply with relevant rules/regulations | 45% | 45% | 45% | 33% | 35% |
| ...makes decisions that effectively ensure public safety | 43% | 44% | 45% | 32% | 32% |
| ...decisions are based on the best available scientific information and data | 43% | 41% | 43% | 32% | 29% |
| ...decisions enhance Canada's global competitiveness | 41% | 36% | 38% | 27% | 27% |
| ...makes decisions that effectively protect the environment | 38% | 37% | 37% | 27% | 27% |
| ...makes decisions in the public interest, for energy projects like new pipelines and power lines | 38% | 35% | 37% | 26% | 26% |
| ...decisions advance Reconciliation with Indigenous peoples* | 31% | 29% | 30% | 20% | 22% |
| ...decisions contribute to an inclusive society | 35% | 31% | 33% | 22% | 21% |

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)... | 2024 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 | 35% | 10% | 25% | 37% | 28% |
| ...makes decisions that effectively ensure public safety | 32% | 9% | 23% | 37% | 31% |
| ...decisions are based on the best available scientific information and data | 29% | 8% | 21% | 40% | 30% |
| ...decisions enhance Canada's global competitiveness | 27% | 7% | 19% | 40% | 34% |
| ...makes decisions that effectively protect the environment | 27% | 7% | 20% | 38% | 36% |
| ...makes decisions in the public interest, for energy projects like new pipelines and power lines | 26% | 8% | 19% | 39% | 35% |
| ...decisions advance Reconciliation with Indigenous peoples* | 22% | 6% | 15% | 38% | 40% |
| ...decisions contribute to an inclusive society | 21% | 5% | 16% | 44% | 35% |

Confidence is similar across most subgroups, with no distinct patterns by demographic factors like gender, age, or education. However, confidence in aspects of the CER's work tends to be higher among those who indicated they are familiar with the CER and those who view pipelines as very safe.

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

| Confidence | 2024 Total (n=1,038) | Region | | | | | | |
|---|----------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| | | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
| The CER ensures pipeline and powerline companies comply with the relevant rules and regulations | | | | | | | | |
| Net: Confident (score 7-10) | 35% | 41% | 36% | 38% | 32% | 33% | 38% | 30% |
| Very confident (score 9-10) | 10% | 12% | 6% | 15% | 9% | 9% | 18% | 12% |
| The CER's decisions enhance Canada's global competitiveness | | | | | | | | |
| Net: Confident (score 7-10) | 27% | 31% | 18% | 29% | 24% | 32% | 27% | 17% |
| Very confident (score 9-10) | 7% | 10% | 4% | 7% | 7% | 7% | 9% | 5% |
| The CER makes decisions that effectively ensure public safety | | | | | | | | |
| Net: Confident (score 7-10) | 32% | 37% | 30% | 41% | 27% | 36% | 33% | 26% |
| Very confident (score 9-10) | 9% | 10% | 7% | 18% | 8% | 9% | 10% | 7% |
| The CER's decisions are based on the best available scientific information and data | | | | | | | | |
| Net: Confident (score 7-10) | 29% | 32% | 24% | 35% | 24% | 37% | 31% | 21% |
| Very confident (score 9-10) | 8% | 9% | 5% | 14% | 6% | 8% | 13% | 10% |
| The CER makes decisions that effectively protect the environment | | | | | | | | |
| Net: Confident (score 7-10) | 27% | 30% | 21% | 34% | 24% | 29% | 28% | 17% |
| Very confident (score 9-10) | 7% | 9% | 3% | 13% | 6% | 8% | 9% | 11% |
| The CER makes decisions in the public interest, for energy projects like new pipelines and power lines | | | | | | | | |
| Net: Confident (score 7-10) | 26% | 33% | 21% | 35% | 22% | 30% | 25% | 24% |
| Very confident (score 9-10) | 8% | 10% | 4% | 12% | 7% | 8% | 8% | 5% |
| The CER's decisions advance reconciliation with Indigenous Peoples | | | | | | | | |
| Net: Confident (score 7-10) | 22% | 28% | 19% | 29% | 19% | 22% | 26% | 14% |
| Very confident (score 9-10) | 6% | 5% | 4% | 13% | 6% | 7% | 8% | 8% |
| The CER's decisions contribute to an inclusive society | | | | | | | | |
| Net: Confident (score 7-10) | 21% | 20% | 13% | 30% | 18% | 29% | 20% | 13% |
| Very confident (score 9-10) | 5% | 6% | 2% | 11% | 5% | 6% | 7% | 5% |

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. Roughly three in ten say they are at least somewhat confident in the CER (7-10 rating), which is comparable to 2023 results but historically low overall.

Overall confidence in the CER

| Level of confidence in the CER | 2021 Total (n=1012) | 2022 Total (n=1,008) | 2023 Total (n=1,029) | 2024 Total (n=1,038) |
|---------------------------------|------------------------|----------------------------|-------------------------|-------------------------|
| Net: Confident (7-10) | 43% | 45% | 32% | 31% |
| Very confident (9-10) | 10% | 9% | 6% | 7% |
| Somewhat confident (7-8) | 33% | 36% | 27% | 23% |
| Neutral (5-6) | 39% | 41% | 41% | 42% |
| Net: Not confident (1-4) | 17% | 15% | 27% | 27% |
| Not very confident (3-4) | 10% | 8% | 15% | 14% |
| Not at all confident (1-2) | 8% | 7% | 11% | 13% |

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

Overall confidence in the CER

| Level of confidence in the CER | 2024 Total (n=1,038) | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
|---------------------------------|----------------------------|---------------|---------------|------------------|---------------|---------------|----------------|-----------------|
| Net: Confident (7-10) | 31% | 34% | 24% | 39% | 26% | 35% | 35% | 16% |
| Very confident (9-10) | 7% | 7% | 3% | 12% | 7% | 8% | 10% | 6% |
| Somewhat confident (7-8) | 23% | 27% | 21% | 27% | 19% | 27% | 25% | 10% |
| Neutral (5-6) | 42% | 42% | 40% | 31% | 47% | 42% | 35% | 33% |
| Net: Not confident (1-4) | 27% | 24% | 35% | 29% | 27% | 22% | 30% | 40% |
| Not very confident (3-4) | 14% | 13% | 21% | 17% | 12% | 11% | 17% | 9% |
| Not at all confident (1-2) | 13% | 12% | 15% | 12% | 15% | 12% | 13% | 32% |

Across regions, net confidence ranges from a low of 16 per cent in the Territories to a high of 39 per cent in the Manitoba and Saskatchewan. Overall confidence ratings are comparable across, age, income and education levels and other subgroups.

When asked why they gave the confidence ratings they did, 15 percent 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. About one in ten 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. A small percentage mention having trust in government/regulation in general.

Just over one in ten 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 cite 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=1,029) | 2024 Total (n=1,038) |
|--|-------------------------|-------------------------|-------------------------|-------------------------|
| Net: General Positive | 16% | 13% | 10% | 15% |
| Good/good job/ competent/ trustworthy/professional/ reliable | 12% | 8% | 7% | 14% |
| Positive news/ word of mouth/ reputation | 3% | 5% | 3% | 2% |
| Net: Mandate related positive | 12% | 13% | 10% | 9% |
| Decisions in the public interest | 4% | 5% | 1% | 5% |
| Enforces regulations/ensures compliance | 1% | 2% | 3% | 4% |
| Protects the environment | 3% | 2% | 2% | 2% |
| Accountable/follows mandate | 3% | 2% | 3% | 1% |
| Ensures human safety | 1% | 2% | 2% | 1% |
| Net: Trust/pride | 3% | 11% | 4% | 2% |
| I trust govt / regulators | 2% | 9% | 3% | 2% |
| Canadian, therefore good | 1% | 2% | <1% | 1% |
| Net: Biases | 11% | 8% | 15% | 11% |
| Biased toward industry | 5% | 3% | 7% | 6% |
| Not independent/politicized | 5% | 5% | 8% | 6% |
| Net: Mandate related negative | 7% | 7% | 9% | 9% |
| Allows environmental damage | 4% | 4% | 5% | 5% |
| Doesn't protect public safety | - | 1% | 2% | 3% |
| Not advancing Reconciliation with Indigenous people | 2% | 2% | 3% | 3% |
| Distrust government/ regulators | 2% | 5% | 6% | 6% |
| Decisions not good /inclusive | 1% | 2% | 6% | 4% |
| Lacks transparency | 2% | 2% | 1% | 3% |
| Too bureaucratic/ Ineffective/ slow/"govt" organization | 2% | 2% | 1% | 2% |
| Bad press / word of mouth / reputation | 2% | 2% | 1% | 1% |
| Fuel prices are high | 0% | 0% | 0% | 1% |
| DK/NA/no specific reason | 44% | 45% | 44% | 43% |

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 British Columbia and Manitoba/Saskatchewan compared to other regions. Perceptions of bias are higher Atlantic Canada than in other provinces.

Reasons for overall confidence in the CER – by region

| Reason | 2024 Total (n=1,038) | BC (n=149) | AB (n=140) | MB/SK (n=97) | ON (n=192) | QC (n=194) | ATL (n=92) | TERR (n=107) |
|---|-------------------------|---------------|---------------|-----------------|---------------|---------------|---------------|-----------------|
| Net: General Positive | 15% | 19% | 14% | 19% | 13% | 16% | 14% | 10% |
| Good/good job/ competent/ trustworthy/professional/ reliable | 14% | 16% | 10% | 18% | 12% | 16% | 12% | 10% |
| Positive news/ word of mouth/ reputation | 2% | 4% | 4% | 2% | 1% | 1% | 2% | 1% |
| Net: Mandate related positive | 9% | 10% | 9% | 24% | 5% | 11% | 11% | 12% |
| Decisions in the public interest | 5% | 5% | 7% | 11% | 2% | 7% | 4% | 8% |
| Protects the environment | 2% | 1% | 0% | 3% | 2% | 2% | 1% | 2% |
| Accountable/follows mandate | 1% | 1% | 0% | 1% | <1% | 0% | 1% | 1% |
| Enforces regulations/ensures compliance | 4% | 3% | 3% | 10% | 3% | 3% | 6% | 2% |
| Ensures human safety | 1% | 1% | 0% | 6% | 0% | <1% | 1% | 1% |
| Net: Trust/pride | 2% | 2% | 0% | 3% | 2% | 4% | 4% | 2% |
| I trust govt / regulators | 2% | 1% | 0% | 2% | 2% | 3% | 2% | 1% |
| Canadian, therefore good | 1% | 1% | 0% | 1% | 0% | 2% | 2% | 1% |
| Net: Biases | 11% | 14% | 15% | 12% | 9% | 11% | 17% | 4% |
| Biased toward industry | 6% | 9% | 7% | 6% | 5% | 5% | 9% | 2% |
| Not independent/politicized | 6% | 5% | 11% | 6% | 5% | 6% | 10% | 2% |
| Net: Mandate related negative | 9% | 9% | 5% | 9% | 7% | 14% | 5% | 15% |
| Allows environmental damage | 5% | 4% | 2% | 7% | 5% | 9% | 3% | 10% |
| Doesn't protect public safety | 3% | 3% | 1% | 2% | 2% | 5% | 1% | 5% |
| Not advancing Reconciliation with Indigenous people | 3% | 3% | 1% | 3% | 3% | 3% | 2% | 2% |
| Distrust government/ regulators | 6% | 5% | 5% | 2% | 7% | 7% | 8% | 3% |
| Bad press / word of mouth / reputation | 1% | 1% | 2% | 1% | 1% | 3% | - | 4% |
| Decisions not good /inclusive | 4% | 4% | 5% | 4% | 4% | 2% | 3% | 1% |
| Lacks transparency | 3% | 1% | 4% | 1% | 3% | 4% | 0% | 1% |
| Too bureaucratic/ Ineffective/ slow/"govt" organization | 2% | 2% | 3% | 2% | 3% | 1% | 2% | 1% |
| Fuel prices are high | 1% | 1% | 2% | 1% | 2% | 0% | 0% | 0% |
| DK/NA/no specific reason | 43% | 41% | 36% | 36% | 51% | 38% | 45% | 54% |

Q21B Why do you say that?

3. Perceptions of the CER

Overall, perceptions of the CER remain relatively stable with only minor variances from previous years; it is still most commonly described as being “Expert.”

Canadians indicated the extent to which they think five terms describe the CER. Although the proportion has decreased, Canadians are still most likely (69%) to think that “Expert” at least somewhat describes the CER. Since 2023, there has been a slight increase in the proportion of Canadians who believe the CER is open and transparent.

Residents of Quebec are among the most likely to say that the CER is timely, an expert, and inclusive. Those who are familiar with the organization and those who are not aware of recent energy projects are also more likely to say the attributes at least somewhat describe 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) | 2023 Total (n=1,029) | 2024 Total (n=1,038) | Region | | | | | | |
|---|----------------------|----------------------|----------------------|----------------------|----------------------|------------|------------|---------------|------------|------------|-------------|--------------|
| | | | | | | BC (n=155) | AB (n=155) | MB/SK (n=104) | ON (n=208) | QC (n=206) | ATL (n=103) | TERR (n=107) |
| Expert | | | | | | | | | | | | |
| Net: Describes | 78% | 77% | 76% | 72% | 69% | 71% | 66% | 73% | 65% | 76% | 70% | 48% |
| Fully describes | 21% | 20% | 17% | 14% | 14% | 18% | 11% | 21% | 9% | 19% | 15% | 11% |
| Fair | | | | | | | | | | | | |
| Net: Describes | 69% | 68% | 69% | 61% | 61% | 67% | 52% | 69% | 57% | 64% | 72% | 48% |
| Fully describes | 11% | 12% | 12% | 7% | 8% | 7% | 5% | 13% | 6% | 10% | 9% | 4% |
| Timely | | | | | | | | | | | | |
| Net: Describes | 64% | 64% | 63% | 54% | 56% | 60% | 42% | 60% | 49% | 68% | 60% | 38% |
| Fully describes | 10% | 9% | 10% | 6% | 7% | 6% | 4% | 8% | 6% | 9% | 5% | 4% |
| Inclusive* | | | | | | | | | | | | |
| Net: Describes | N/A | 64% | 65% | 58% | 56% | 65% | 49% | 61% | 51% | 58% | 65% | 40% |
| Fully describes | N/A | 10% | 11% | 7% | 7% | 5% | 4% | 14% | 6% | 8% | 10% | 5% |
| Open and transparent to the public | | | | | | | | | | | | |
| Net: Describes | 61% | 60% | 59% | 49% | 52% | 59% | 42% | 61% | 48% | 52% | 64% | 36% |
| Fully describes | 11% | 10% | 10% | 5% | 9% | 8% | 5% | 16% | 7% | 10% | 13% | 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.

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. Other factors such as familiarity, belief in pipeline safety, interaction with CER, experience in industry, awareness of projects, and proximity to projects make up a third tier.

| Key Driver Analysis | | | | | |
|----------------------------|---|---|------------|---------------|------------|
| Tier of Driver | Drivers | Impact on Overall Confidence in the CER (%) | | | |
| | | 2021 | 2022 | 2023 | 2024 |
| 1st Tier | Belief in CER's decision making | 66% | 65% | 74% | 72% |
| Factors | The CER makes decisions in the public interest | 8% | 11% | 11% | 10% |
| | The CER makes decisions that effectively ensure public safety | 8% | 9% | 8% | 10% |
| | The CER's decisions enhance Canada's global competitiveness | 8% | 7% | 10% | 10% |
| | The CER's decisions are based on the best available scientific information and data | 8% | 9% | 11% | 9% |
| | The CER ensures compliance with relevant rules and regulations | 9% | 7% | 8% | 9% |
| | The CER's decisions contribute to an inclusive society | 8% | 7% | 9% | 9% |
| | The CER makes decisions that effectively protect the environment | 9% | 8% | 9% | 8% |
| | The CER's decisions advance Reconciliation with Indigenous Peoples | 8% | 7% | 8% | 7% |
| 2nd Tier | CER Attributes | 29% | 29% | 25% | 25% |
| Factors | Fair | 7% | 7% | 7% | 6% |
| | Open and transparent | 8% | 6% | 6% | 6% |
| | Expert | 4% | 6% | 4% | 5% |
| | Inclusive | 6% | 5% | 4% | 4% |
| | Timely | 4% | 5% | 4% | 4% |
| 3rd Tier | Familiarity/awareness | 2% | 2% | <1% | 1% |

| | | | | | |
|--|--|---|---|---|---------------|
| | Belief in pipeline safety | - | - | - | 1% |
| | Interaction with CER | - | - | - | 1% |
| | Experience in industry | - | - | - | <1% |
| | Awareness of energy transmission infrastructure in region | - | - | - | <1% |
| | Affected public | - | - | - | <1% |

Seventy-two percent of the variance in Canadians' overall level of confidence in the CER is impacted by their beliefs about its decision making, comparable to 2023. Canadians' belief that the CER makes decisions in the public interest, to ensure public safety, and to enhance Canada's global competitiveness make up the largest share of impact and can be considered key drivers in their level of confidence in the organization. Views about the CER's attributes drive 25 percent of confidence. This year, familiarity/awareness with the CER, belief in pipeline safety, and interaction with the CER accounted for just one percent of the variance in confidence. Other factors, such as experience in industry, awareness of energy transmission projects in the region, or being members of the affected public did not have an impact.

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 931 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 107 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 | 1,038 | 1,038 |
| Atlantic | 6.5% | 100 | 103 | 67 |
| Quebec | 23% | 200 | 206 | 239 |
| Ontario | 38.5% | 200 | 208 | 400 |
| MB/SK | 6.7% | 100 | 104 | 69 |
| Alberta | 11.5% | 150 | 155 | 119 |
| BC | 13.5% | 150 | 155 | 140 |
| Territories | <1% | 100 | 107 | 3 |

*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. To better serve the Canada Energy Regulator's needs, the survey was adapted in 2024 to include new questions aimed at providing a clearer picture of the type of Canadians who are most engaged with the topic. 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 January 18-29, 2024. 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 January 18-29, 2024.

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) | 27625 |
| Total completes (d) | 931 |
| Qualified break-offs (e) | 256 |
| Disqualified (f) | 185 |
| Not responded (g) | 24288 |
| Quota filled (h) | 1965 |
| Contact rate = (d+e+f+h)/c | 12.08 |
| Participation rate = (d+f+h)/c | 11.15 |

Contact disposition – telephone survey

| Disposition of calls | TOTAL |
|--|-------------|
| Total sample dialed | 4516 |
| Unresolved numbers (U) | 2152 |
| Busy | 282 |
| No answer | 937 |
| Voicemail | 933 |
| Resolved numbers (<i>Total minus Unresolved</i>) | 2364 |
| Out of scope (<i>Invalid/non-eligible</i>) | 1202 |
| Non-household | 26 |
| Not-in-service | 1167 |
| Fax/modem | 9 |
| In-scope non-responding (IS) | 963 |
| Refusals – household | 139 |
| Refusals – respondent | 394 |
| Language barrier | 64 |
| Callback missed/respondent not available/ill | 352 |
| Break-offs (interview not completed) | 14 |
| In-scope - responding (R) | 199 |
| Disqualified | 92 |
| Quota filled | 0 |
| Completed | 107 |
| Response rate [R / (U + IS + R)] | |

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 | 50 |
| Other | 1 |
| Education | |
| High school or less | 15 |
| Trades/some post sec | 14 |
| College | 25 |
| University graduate/post-graduate | 46 |
| Employment status | |
| Full time/self employed | 58 |
| Part time | 9 |
| Not employed (student, unemployed, homemaker etc.) | 9 |
| Retired | 23 |
| Total annual household income | |
| Under \$40,000 | 16 |
| \$40,000-<\$80,000 | 27 |
| \$80,000-<\$100,000 | 16 |
| \$100,000+ | 40 |
| Language spoke most at home | |
| English | 78 |
| French | 22 |
| Other | 8 |

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 | 50% | 51% |
| Age | | |
| 18-34 | 27% | 21% |
| 35-49 | 27% | 20% |
| 50-64 | 26% | 21% |
| 65+ | 20% | 19% |
| Education level ^α | | |
| High school diploma or less | 15% | 35% |
| Trades/college/post sec no degree | 39% | 36% |
| University degree | 46% | 29% |

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

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

Appendix B: Quantitative research instrument

Environics Research Group
January 2024

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 **TBD**.

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
 - No

- B At home, do you have a traditional telephone line other than a cell phone?
 - Yes
 - No

WEB INTRODUCTION

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

- 01- English / Anglais
- 02- Français / French

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

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

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

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

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 [TERMINATE IF ONLINE] |
| Northwest Territories | 12 [TERMINATE IF ONLINE] |
| Nunavut | 13 [TERMINATE IF ONLINE] |

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

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)

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

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

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

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.

Safety and Environment Oversight: Setting and enforcing regulatory expectations for companies regulated by CER.

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.

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

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

The CER makes decisions in the public interest, for energy projects like new pipelines and power lines

The CER makes decisions that effectively protect the environment

The CER makes decisions that effectively ensure public safety

The CER ensures pipeline and powerline companies comply with the relevant rules and regulations

The CER's decisions enhance Canada's global competitiveness

The CER's decisions advance reconciliation with Indigenous Peoples

The CER's decisions are based on the best available scientific information and data

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

Timely

Expert

Fair

Open and transparent to the public

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

26A. In the past three years, have you or any members of your household directly interacted with the CER?

01 – Yes

02 – No

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Not sure

26B. **IF 01 AT Q26A** If yes, in the past three years which of the following best describes your interaction(s) with the CER?

01 – Looked at the CER website

02 – Communicated with an inspector

- 03 – Attended a CER engagement event
- 04 – Submitted an application
- 05 – Requested a response to a question or concern
- 06 – Participated in a formal process such as a regulatory appeal, a hearing or another process
- 07 – Interacted with a CER staff member
- 08 – Other (please specify)

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

- 01 – Yes
- 02 – No **SKIP TO AWARENESS & FAMILIARITY WITH CER SECTION**
- VOLUNTEERED – DO NOT SHOW ONLINE**
- 99 – Not sure **SKIP TO AWARENESS & FAMILIARITY WITH CER SECTION**

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

PHONE: DO NOT READ LIST UNLESS NECESSARY - IF “NEWSPAPER” PROBE FOR TYPE OF NEWSPAPER
ONLINE: SHOW 1-97

- 01 – On TV
- 02 – On radio
- 03 – Local community or weekly newspaper
- 04 – Major city or national (daily) newspaper
- 05 – On a website
- 06 – Social media (general)
- 07 – Word of mouth (friends, family etc.)
- SHOW ONLINE/ VOLUNTEERED PHONE**
- 97 – Other – Please specify _____
- VOLUNTEERED – DO NOT SHOW ONLINE**
- 99 – I don’t recall / DK/NA **(SINGLE PUNCH)**

28. Do you recall the source or originator of the information you recently saw or heard? (PHONE: Would it have been from the Canada Energy 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)**

NEW – Awareness and Familiarity with CER

29A. Have you ever worked in the oil and gas industry?

01 – Yes

02 – No

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Not sure

29B. Are you aware of any energy transmission infrastructure such as pipelines or powerlines that cross a national, provincial or territorial border in your region – completed, underway or planned?

01 – Yes

02 – No

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Not sure

29C. **IF 01 AT Q29B ASK** If yes, do you live near any of them?

01 – Yes

02 – No

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Not sure

29D. In general, do you think pipelines are safe or unsafe?

01 – Very safe

02 – Somewhat safe

03 – Not very safe

04 – Not at all safe

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Not sure

Respondent Demographics

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

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

PHONE: DO NOT READ LIST EXCEPT TO CLARIFY

ONLINE: SHOW 1-7

- 01 – Less than a high school diploma or its equivalent
- 02 – High school diploma or a high school equivalency certificate
- 03 – Trades certificate or diploma
- 04 – College, CEGEP or other non-university certificate or diploma (other than trades certificates or diplomas)
- 05 – University certificate, diploma or degree below the bachelor’s level
- 06 – Bachelor’s Degree (e.g., B.A., B.A. (Hons), B.Sc., B.Ed., LL.B.)
- 07 – University certificate, diploma or degree above the bachelor’s level

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don’t know/Refused

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

PHONE: DO NOT READ LIST – ACCEPT ALL THAT APPLY

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

- 01 - English
- 02 - French
- 03 - Other

VOLUNTEERED – DO NOT SHOW ONLINE

99 - Don’t know/Refused

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

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

PHONE: READ LIST – ACCEPT ONE ANSWER ONLY 0 STOP READING WHEN REACHING RESPONDENT CATEGORY

ONLINE: SHOW 01-07

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

VOLUNTEERED – DO NOT SHOW ONLINE

97– Other [DO NOT SPECIFY]

99 – Refused

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

PHONE: READ LIST – STOP WHEN REACH RESPONDENT’S CATEGORY

ONLINE: SHOW 1-7

01 - Under \$20,000

02 - \$20,000 to just under \$40,000

03 - \$40,000 to just under \$60,000

04 - \$60,000 to just under \$80,000

05 - \$80,000 to just under \$100,000

06 - \$100,000 to just under \$150,000

07 - \$150,000 and above

VOLUNTEERED – DO NOT SHOW ONLINE

99 – Refuse/NA

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

— — —

SHOW ONLINE: 999 – Prefer not to answer

PHONE VOLUNTEERED ONLY: 999 – Prefer not to say