

2017 AER Survey of Albertans and Stakeholders

Executive Summary

June 2017

Alberta Energy Regulator

2017 AER Survey of Albertans and Stakeholders: Executive Summary

June 2017

Published by

Alberta Energy Regulator

Suite 1000, 250 – 5 Street SW

Calgary, Alberta

T2P 0R4

Telephone: 403-297-8311

Inquiries (toll free): 1-855-297-8311

Email: inquiries@aer.ca

Website: www.aer.ca

Background

The Alberta Energy Regulator (AER) conducts annual public opinion research to measure its progress in increasing awareness and confidence among Albertans, indigenous peoples, and other stakeholder groups. The collection of quantitative research data helps the AER create a baseline measure, tracks AER progress, and tracks key areas of concern among a variety of audiences and stakeholders.

Objectives

The objectives of the project:

- To measure public opinion and perceptions about how the oil and gas industry is regulated in Alberta
- To measure familiarity and determine perceptions of the AER among the general public and specific stakeholder groups (e.g., municipalities, indigenous peoples, landowners, environmental nongovernment organizations, industry)
- To refine existing attribute testing and questionnaires to ensure alignment with the AER Strategic Plan performance measures
- To identify issues of priority or concern
- To make recommendations to improve AER communications processes, programs, and services to better serve Albertans

Methodology

The survey included 1000 random telephone interviews of Albertans aged 18 and over. The margin of error for this survey is ± 3.1 percentage points, 19 times out of 20. The data were cross-tabulated by different variables to examine any statistical differences that emerged. Where possible, data were compared with results of previous AER surveys and studies.

In addition to the general public research, the 2017 survey included 267 telephone and online interviews of stakeholders. Among these, 214 interviews were conducted over the telephone and 53 were conducted online. Groups interviewed included indigenous peoples, rural landowners, environmental nongovernment organizations, municipalities, and industry. As this was a census survey, a margin of error is not reported. Where possible, data was compared with results from previous AER surveys and studies.

The survey of 1000 Canadians was conducted online, which does not provide a margin of error for calculations. However, a comparison for the sample size of Albertans and Canadians would produce a margin of error of ± 2.0 per cent 19 times out of 20.

This survey of Albertans, stakeholders, and Canadians took place from December 30, 2016, through to January 30, 2017.

Cost of Research

Leger Marketing was selected as the vendor, following a transparent and competitive procurement process. The total cost of the 2017 survey was \$69 940.

Overview of Findings

While unaided awareness of the AER decreased in 2017 (8 per cent compared to 12 per cent in 2016), total awareness held steady at 50 per cent for the second year in a row after several years of steady growth. Familiarity with the AER also increased from 27 per cent to 33 per cent.

Albertans are supportive of oil and gas development with significant shifts in attitudes in 2017. In fact, 44 per cent of Albertans reported that there is “not enough oil and gas development” compared to 13 per cent in 2015. Only 9 per cent reported feeling that development is moving too quickly, which is down from 28 per cent in 2015.

Albertans remain concerned about the protection of water and soil (78 per cent compared to 81 per cent in 2016), human and animal health (75 per cent compared to 77 per cent in 2016) and aging infrastructure (71 per cent compared to 74 per cent in 2016). Concern about water usage by the oil and gas industry dropped from 73 per cent in 2016 to 65 per cent in 2017.

Stakeholders have concerns similar to those of Albertans, but they express different rankings with their top three concerns being water use by the oil and gas industry (71 per cent compared to 67 per cent in 2016), aging infrastructure (70 per cent compared to 73 per cent in 2016), and protection of water and soil (steady at 69 per cent).

Ensuring public safety continues to be the most important AER function for Albertans at 97 per cent (compared to 87 per cent in 2016 and 89 per cent in 2015), while ensuring appropriate incident response (97 per cent) ranked higher than enforcing the rules (95 per cent). Protecting the environment remained a high priority at 95 per cent.

When asked to choose one “most important” function, however, the order changes slightly with ensuring public safety at 34 per cent, followed by ensuring environmental protection at 19 per cent and enforcement at 12 per cent. These top three priorities have remain unchanged since 2000.

Overall perceptions of the AER remain positive, with 73 per cent of the general public holding positive views of the AER, compared to 75 per cent in 2016. Among stakeholders, indigenous peoples reported increases in perception scores (67 per cent compared to 37 per cent in 2016), while environmental nongovernment groups were at 72 per cent, closer to 2015 levels, following a drop to 61 per cent in 2016. Municipalities increased to 96 per cent (from 92 per cent in 2016) while industry and landowners remained stable.

Favourable ratings for AER performance continued with both Albertans and stakeholders in 2017, with the highest scores (agree somewhat or strongly) in incident response (85 per cent Albertans, 88 per cent stakeholders) and in ensuring that oil and gas development is environmentally responsible (82 per cent Albertans and 78 per cent stakeholders).

Albertans reported increased ratings for the AER in regulating the oil and gas industry in a responsible manner (77 per cent) in 2017 compared to 72 per cent in 2016), while enforcement scores remained stable at 76 per cent. Transparent communications increased from 55 per cent to 60 per cent for Albertans and from 64 per cent to 68 per cent for stakeholders. There was a significant increase in those who felt the AER is accountable for its work, with both Albertans and stakeholders providing a ranking of 75 per cent in 2017 (compared to 2016 rankings of 69 per cent for Albertans and 67 per cent for stakeholders).

Among stakeholders, there were no major areas of decrease, with increases in open, transparent communications (68 per cent in 2017 and 64 per cent in 2016) and with most scores holding steady in 2017. Indigenous communities reported increases in effective engagement at 74 per cent while all stakeholders gave high marks for incident response.

Confidence in the AER's ability to deliver on its mandate remained stable in 2017 at 82 per cent for Albertans and 77 per cent among stakeholders.

Among stakeholders, municipalities reported the highest confidence scores (88 per cent), followed by industry (86 per cent), although for both groups the numbers declined since 2016 (from 93 per cent and 90 per cent). Confidence among landowners grew from 69 per cent in 2016 to 72 per cent in 2017, while environmental nongovernment groups reported a small increase to 50 per cent (from 48 per cent in 2016). Although the sample size for indigenous peoples was small, this group expressed a growth in confidence from 32 per cent in 2016 to 70 per cent in 2017.

Use of Findings

The AER Strategic Plan sets out targets for the AER to meet with respect to awareness and confidence among Albertans. Regular testing allows the AER to measure its progress, identify key issues and concerns, and respond accordingly.

The AER uses opinion research results to better understand the concerns of Albertans, stakeholders, and Canadians. This helps it prepare public information and communications materials and supports its engagement efforts.

Contact information

Contact our 24-hour media line at 1-855-474-6356 for more information.