

2015 AER Survey of Albertans and Stakeholders

Executive Summary

Alberta Energy Regulator

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Background

The AER conducts annual public opinion research to measure its progress in increasing awareness and confidence amongst Albertans, First Nations and Métis communities, 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, First Nations, landowners, NGOs, industry)
- To refine existing attribute testing and questionnaires to ensure alignment with AER 2014-17 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 of Albertans included 1004 random telephone interviews of Albertans aged 18 and over between February 12 and March 1, 2015. The margin of error for the 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 the results of previous AER studies.

Stakeholder surveys included 200 telephone interviews with stakeholders between March 23, 2015, and April 9, 2015. Groups interviewed included First Nations and Métis, rural landowners, environmental nongovernment organizations, municipalities, and industry. The margin of error is $\pm 6.9\%$, 19 times out of 20. No data comparison was conducted as this was the AER's first targeted stakeholder survey.

Cost of Research

Leger Marketing was selected as the vendor following a request-for-proposal process. The total cost of the research project was \$ 81 875 (\$ 77 500 + GST \$ 3875).

Overview of Findings

While unaided awareness of the AER is low (8%)¹, total awareness of the regulator and its role in regulating energy development (aided and unaided) is at 41%, an increase of 9% since July 2014 (OmniWeb National Survey). While certain areas of the province reported concerns with oil and gas development, Albertans are generally supportive, with 60% saying there is the “right amount of development” in the province and 13% (down from 17% in 2014) saying there is not enough. The number of Albertans who felt there is too much oil and gas development increased from 16% in 2014 to 21% in 2015.

When it comes to oil and gas development issues and what Albertans expect from the AER, Albertans remain concerned about the protection of water and soil (87%), human and animal health (73%), and water usage by the oil and gas industry. Stakeholders have similar concerns although they rank them differently, with water use by the oil and gas industry (84%) and aging infrastructure (84%) being of highest concern and protection of water and soil (82%) also a high concern. Concerns vary among stakeholder groups, with First Nations expressing higher levels of concern on environmental issues.

Ensuring public safety (89%) and enforcing the rules (85%) remain top priorities for Albertans when asked about importance of AER functions. In 2014, ensuring appropriate incident response tracked very high at 88% and has again been highlighted with 84% of Albertans indicating it as a high priority. Environmental protection also remained high with 82% of Albertans giving it high importance.

When asked to choose one “most important” function, however, the order changes slightly with ensuring public safety at 36% followed by environmental protection (25%) and enforcement (12%).

Overall perceptions of the AER are positive with 78% of the general public holding positive views of the AER and 75% of stakeholders viewing the AER in a positive manner in 2015 (based on a score of 5–10 out of 10). Albertans and stakeholders rate AER performance favourably across several key areas, with the highest scores (agree somewhat or strongly) in incident response (82% Albertans; 82% stakeholders) and enforcement (77% Albertans; 78% stakeholders) and the lowest scores in transparent communications (55% Albertans; 71% stakeholders).

With respect to stakeholder satisfaction with AER interaction, municipalities reported the highest level of satisfaction at 96%, with ENGOs (77%) and industry (76%) also reporting high levels of satisfaction. Satisfaction rates were lower among landowners (63%) and First Nations and Métis (44%). Generally, high satisfaction levels were attributed to the regulator’s proactive communications and timely responses to concerns while lower rankings were related to longer response times. When asked about quality of interactions with AER staff, stakeholders indicated high levels of satisfaction, most notably with the level of professionalism and knowledge of AER employees.

¹ The ERCB did not test for unaided recall in past surveys; testing aided recall only.

In 2015, 26% of Albertans recall having seen, read, or heard mention of the AER in the media, an increase of 19% over 2014 and 2013. Among Albertans exposed to media, most recall traditional media sources such as newspaper articles (34%), TV coverage (27%), and radio (15%). Online sources continue to provide opportunities for Albertans to learn about the AER, with 16% of media recall.

Most Albertans (77%) and stakeholders (74%) express confidence in the AER's ability to deliver on its mandate. Among stakeholders, industry (90%) and municipalities (87%) are more likely to express confidence levels of 5–10 than are First Nations and Métis (52%), ENGOs (63%), or landowners (65%).

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 and stakeholders, which helps it prepare public information and communications materials and support its engagement efforts.

Contact information

Contact our 24-hour media line at 1-855-474-6356 or one of our media contacts. See more at:

<http://www.aer.ca/about-aer/contact-us/media-contacts>