

2016 AER Survey of Albertans and Stakeholders

Executive Summary

Alberta Energy Regulator

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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 nongovernmental 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 of Albertans included 1000 random telephone interviews of Albertans aged 18 and over between February 10 and 28, 2016. 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.

Stakeholder groups included 331 interviews between the dates of February 10 and March 14, 2016. Among these, 211 interviews were conducted over the telephone and 61 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 to results from previous AER surveys and studies.

Cost of Research

Leger Marketing was selected as the vendor, following a request-for-proposal process. The total cost for the 2016 survey was \$68 700.

Overview of Findings

While unaided awareness of the AER remains relatively low at 12 per cent, this is an increase from 8 per cent in 2015. Total awareness of the regulator (aided and unaided) and its role in regulating energy development increased to 50 per cent compared to 41 per cent in 2015 (an increase of 22 per cent).

Albertans are supportive of oil and gas development with significant shifts in attitudes since 2015 with 40 per cent of Albertans reporting that there is “not enough oil and gas development” compared to 13 per cent in 2015. The number of Albertans expressing that there is “too much” oil and gas development dropped from 21 per cent in 2015 to 15 per cent, leaving 40 per cent of Albertans expressing there is the “right amount of development” compared to 60 per cent in 2015.

Albertans remain concerned about the protection of water and soil (81 per cent) and human and animal health (77 per cent). For the first time, Albertans count concerns about aging oil and gas infrastructure as a top three concern at 74 per cent. Concern levels about water usage by the oil and gas industry dropped from 77 per cent in 2015 to 73 per cent in 2016.

Stakeholders hold similar concerns to Albertans, but express different rankings with aging infrastructure top of mind (73 per cent), followed by protection of water and soil (68 per cent) and water usage by the oil and gas industry at 67 per cent.

Ensuring public safety continues to be the most important AER function for Albertans at 87 per cent (compared to 89 per cent in 2015 and 92 per cent in 2014), while ensuring appropriate incident response (84 per cent) ranked higher than enforcing the rules (80 per cent).

When asked to choose one “most important” function, however, the order changes slightly with ensuring public safety at 33 per cent, followed by environmental protection at 19 per cent, and enforcement at 14 per cent. These top three priorities have remain unchanged since 2001.

Overall perceptions of the AER remain positive, with 75 per cent of the general public holding positive views of the AER, compared to 78 per cent in 2015 (based on a score of 5-10 out of 10). Among stakeholders, landowners reported increases in perception scores (69 per cent compared to 55 per cent in 2015), while industry and municipalities remained stable. Significant decreases in perception were noted among indigenous peoples (37 per cent compared to 43 per cent in 2015) and ENGOs (61 per cent compared to 77 per cent).

Albertans and stakeholders provide favourable, and in most cases, increasing ratings for AER performance across a number of key areas, with highest scores (agree somewhat or strongly) in incident response (83 per cent Albertans, 90 per cent stakeholders), and in ensuring oil and gas development is environmentally responsible (81 per cent Albertans, 79 per cent stakeholders).

Enforcement scores were slightly lower among Albertans, at 75 per cent compared to 77 per cent in 2015, yet remained stable at 78 per cent among stakeholders. Transparent communications remained low at 55 per cent for Albertans and 64 per cent for stakeholders and there was a decrease in those who felt the AER is accountable to Albertans (Albertans 69 per cent, stakeholders 67 per cent).

Among stakeholders, there was a decrease in those who felt the AER makes decisions consistently (64 per cent compared to 73 per cent in 2015), while ENGOs reported drops in the AER's accountability from 63 per cent in 2015 to 35 per cent in 2016. Industry respondents provided lower scores for the AER in ensuring that development is environmentally responsible (94 per cent compared to 100 per cent in 2015), enforcing the rules (down from 100 per cent in 2015 to 92 per cent in 2016).

Among Albertans, confidence in the AER's ability to deliver on its mandate has grown from 77 per cent in 2015 to 82 per cent in 2016.

Stakeholders also reported increases in confidence (from 74 per cent in 2015 to 77 per cent in 2016). Among stakeholders, industry remains steady at 90 per cent, while there are increases for municipalities (93 per cent compared to 87 per cent in 2015) and landowners (up to 69 per cent from 65 per cent).

ENGOs reported significantly lower confidence scores (48 per cent compared to 63 per cent) as did indigenous peoples (32 per cent compared to 52 per cent in 2015).

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 for more information.