



2004 LANDOWNER SURVEY

FINAL REPORT

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National Energy Board

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INTRODUCTION

The National Energy Board (NEB, or the Board) was established in 1959 as an independent federal agency to regulate aspects of Canada's energy industry, including the construction and operation of pipelines and power lines. Under the mandate of the National Energy Board Act and other federal legislation, the Board's purpose is to promote safety, environmental protection and economic efficiency in the Canadian public interest. Fulfilling this role requires engaging all relevant stakeholders through various processes, including workshops, pre-application meetings and public hearings.

With respect to energy pipelines, a key stakeholder group consists of landowners on whose property these pipelines run (e.g. along "rights of way"). Ensuring pipelines are safe and perceived safe is a key goal of the NEB.

The NEB initiated a process to systematically monitor and evaluate landowners' experiences and attitudes on an ongoing basis about pipeline projects affecting their property. A previous survey of landowners was conducted by the NEB in 2001, and in 2004 the Board identified the need to collect further feedback in a more systematic fashion.

The overall purpose of the 2004 survey is to systematically and objectively collect information from landowners across Canada on matters related to pipeline issues falling within the NEB mandate generally, and specifically with respect to landowners' experience with both pipeline companies and the NEB. This year, the research incorporates relevant metrics developed under the Service Improvement Initiative (SII) developed by Treasury Board, to provide a basis for comparing NEB ratings with broader government benchmarks for customer service performance. This was accomplished by including selected questions from the Common Measurements Tool (CMT), developed under the SII to provide a common set of benchmark measures to

facilitate comparisons across a wide spectrum of public sector services and products.

More specifically, the objectives of this survey are to:

- Measure landowners' experiences and satisfaction with the handling of issues pertaining to pipelines affecting their property (e.g., information provided by companies, impacts on their land, contact with the NEB);
- Identify how landowners' experiences and views may have changed since the previous survey conducted in 2001, where comparable data are available;
- Uncover how landowner experiences are influenced by factors relating to region, property type, and landowner characteristics;
- Measure landowner satisfaction with the NEB and company service delivery; and
- Provide the NEB with recommendations for future research and communications with landowners.

The research consisted of telephone interviews with a representative sample of 1,121 landowners across Canada, conducted between March 11 and 25, 2004. Landowners were identified through lists provided by the NEB and pipeline companies. The sample was stratified across the six regions in which pipelines are located. The margin of sampling error for the full sample is plus or minus 2.9 percent (at the 95% confidence level). A more detailed description of the methodology used to conduct this study is provided at the back of this report, along with a copy of the questionnaire (Appendix).

This reports begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the survey data. Questions are referenced by number, and can be found adjacent to or below the graphs and tables, as well as in the questionnaire in the Appendix. In graphs and tables, the sample size is noted wherever it is less than the full sample of 1,121. All results are expressed as a percentage, unless otherwise noted.

EXECUTIVE SUMMARY

The results of this survey reveal that landowners' experiences with pipelines, the companies that operate them, and the NEB have in most cases been largely positive, with only a small number expressing clear dissatisfaction with unresolved problems and/or poor treatment.

Landowners' Experience with Local Pipelines

Living near an energy pipeline does not appear to be an issue for most landowners across Canada. Most feel generally safe living near a pipeline, and have confidence in the company operating it. Landowners know their local pipeline is inspected at least once a year, and seem to be generally familiar with safety procedures involving excavation requirements and who to contact in the event of an emergency.

At the same time, landowners do not express quite as strong confidence in the NEB's capability to effectively monitor company performance (possibly through lack of knowledge of its mandate and activities), and a plurality would like to see more government oversight over pipeline safety. This sentiment may reflect a desire for greater government attention to issues that extend beyond safety-related concerns, such as environmental protection, damage prevention, and compensation.

Landowner Contact with Pipeline Companies

Almost all of the landowners surveyed have had some type of regular contact with the company operating the pipeline crossing their property. More than eight in ten report the company initiates contact with them at least once a year, typically by mail or through an in-person visit. Such contacts are most likely to be safety-related (e.g., safety inspection), but also deal with issues related to accessibility, construction, and property rights.

About one-third of landowners have themselves initiated contact with their local pipeline company in the past five years. Most have done so more than once, and one-third of this group (or about one in ten of all landowners) have done so more than five times over this time period. Landowners are most likely to contact the company because of construction-related issues, but also to address issues about property damage, compensation, safety or environmental concerns.

Whether company or landowner initiated, landowners' experiences with their local company in most cases have been very positive. More than eight in ten say they are satisfied, if not very satisfied, with their interaction with the company, in terms of it being accessible, treating them well, offering competent company representatives, and addressing their needs. Satisfaction declines somewhat, however, with the frequency of such contact over the past five years (i.e., those with more significant concerns or receiving an unsatisfactory response are more apt to be in more frequent contact).

Landowners also give high marks to the information supplied by the company, in terms of being current, relevant and easy to understand. Many of those surveyed recall receiving NEB publications through their local company, and this information is also highly rated.

Landowner Contact with the NEB

Most (82%) landowners have heard of the NEB, and close to half (45%) are familiar with NEB publications distributed through their local pipeline company. But in contrast to the regular interaction with this company, very few have had direct contact with the NEB. Only five percent of the landowners surveyed report to have contacted the NEB in the past five years, with most of this contact coming from landowners in B.C. and Alberta, and those who live in closer proximity to the pipeline crossing (e.g. within 500 metres). Very few (2%) of landowners have visited the NEB website within the past 12 months.

The small number of landowners reporting such contact significantly limits the ability to draw any conclusions about this experience, but most in this group are generally satisfied with their most recent contact with the Board.

In terms of all landowners' expectations when contacting the NEB, at least three-quarters place a high priority on getting through without difficulty, encountering staff who are knowledgeable and competent, receiving fair treatment and getting what they need. Two-thirds place this degree of importance on having Board staff "go the extra mile" to help address their needs.

One in ten of all landowners surveyed report to have ever participated in an NEB-sponsored event, in most cases a public information session (7%) or public hearing (3%). This group is mostly positive about their experience with these events, particularly in terms of their timing and location. A sizeable minority (26%) of landowners surveyed recall something about NEB public hearings in their area over the past five years, but few (4%) have attended one, in most cases because they saw no need to (e.g., had no concerns or issues with respect to the activity being proposed) or could not fit it into their own schedule.

Variations by Landowner Segments

The findings from this survey are generally similar across the landowner population, in terms of region and property characteristics (e.g., land use, size of property, community type, land tenure, proximity to pipeline on property). While variation is evident on a number of questions (in some cases to a significant degree), the overall conclusions reported above largely hold for all of the groups examined.

Landowners' experiences differ noticeably in some cases across regions of the country. The most activity appears to be taking place in B.C. and Alberta, where there is the more frequent contact with both local pipeline companies and the NEB. Landowners in Alberta, however, appear to be among the least satisfied in their dealings with the former. Landowners in Quebec tend to be among the most positive about contacts with pipeline companies, while those in Saskatchewan/Manitoba and New Brunswick/Nova Scotia are among the most likely to express confidence in the work of the NEB.

Considerable activity is also reported in New Brunswick and Nova Scotia, where there is frequent contact with companies, the broadest awareness of local public hearings, and also high ratings of company-supplied information. Quebec landowners are the most urbanized group, and this is reflected in the fact that they are least familiar with, and likely to have contact with, either their local pipeline company or the NEB.

Recommendations for Further Research

This survey provides a valuable assessment of current performance by pipeline companies (and to a more limited degree the NEB) in addressing landowners' experiences with issues affecting their property. It can serve as an important benchmark, against which performance can be measured over time, as well as against other public sector organizations (through use of the CMT database). It is recommended that this survey be conducted on an annual or biannual basis, using the core questions and supplementing new ones as needed to address emerging issues.

To ensure this research program achieves its objectives, a priority should be placed on the development and maintenance of a database of all landowner contacts with the NEB, that can be used to draw appropriate population samples over time for evaluating service performance. This survey provides a starting point by obtaining consent from respondents who indicated

their willingness to participate in future surveys of this type. Beyond this, the NEB should work with pipeline companies to ensure ongoing access to their own databases of landowners, to ensure the broadest possible coverage of this population.

An important limitation of this survey is the sparse data that could be collected from landowners who have had direct contact with the NEB (due to the low incidence of such contact within this population). In order to properly assess the NEB's performance in addressing landowner issues and concerns, it is also recommended that separate research be conducted specifically targeting these key audiences, including landowners who have recently initiated contact with the NEB by telephone or mail (e.g. through a separate telephone survey), and those who have visited the Board's website (through a web-based survey). This research will ensure the Board captures a full and systematic picture of the progress it is making in addressing this important part of its mandate.

FAMILIARITY WITH PIPELINE AND SAFETY ISSUES

Awareness of Pipeline Company and Fuel Type

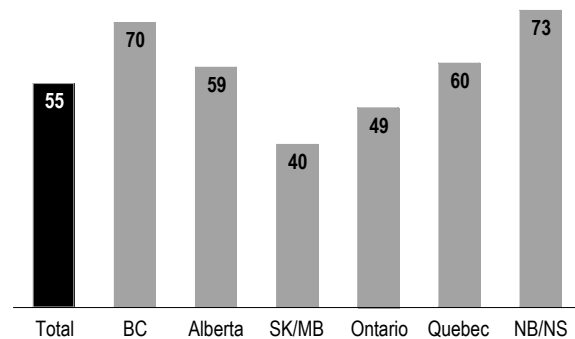
Little over half of landowners across the country can correctly identify their local pipeline company by name.

Some of the early questions on the survey examined landowners' awareness of various aspects of the pipeline that runs through their property. This information is useful in assessing the effectiveness of company communications, and the need for further efforts in this area. Safety is an important aspect of pipeline operation and regulation, and therefore one of the NEB's strategic goals. Questions were designed to monitor perceptions of safety among landowners.

AWARENESS OF PIPELINE COMPANY. Landowners were asked if they could identify the name of the company that operates the pipeline crossing their property. Overall, most landowners (84%) could provide a company name, although not all responses were correct. Among those in the sample for whom the actual company could be identified (884 out of 1,121 respondents), just over half (55%) correctly named the company operating the pipeline on their property.¹

Across the country, awareness of the local pipeline company is highest in B.C. (70%) and New Brunswick/Nova Scotia (73%), while considerably lower in Saskatchewan/Manitoba (40%). Awareness is somewhat higher among landowners with a pipeline within 100 metres of their dwelling. The sample is not large enough to report on accuracy of this knowledge by company.

Correctly identifies local pipeline company By region



Q.6

Can you tell me which company operates the pipeline that crosses your property?

The percentage of landowners unable to even guess at the company name ranges from a low of nine percent in Alberta, to 21 percent in Quebec.

¹ Respondents' identification of their local pipeline company by name could be validated because most of the sample used for the survey was supplied by companies, thereby providing a basis for verification in these cases. Company information was not available for that portion of the survey sample that was obtained from a previous NEB survey of landowners conducted in 2002 (N=237) or those taken from a small list of landowners who had contacted the NEB directly within the past year (N=27).

AWARENESS OF FUEL TYPE. Landowners were also asked about their knowledge of the type of product or fuel that flows through the pipeline crossing their land.² Almost two-thirds (64%) identify this as a gas-related product, in most cases natural gas although a few mention other types, such as sour or sweet gas. More than one-third (37%) report that some form of oil product is in their local pipeline, mostly oil and fewer mentions of gasoline, propane or other types. One in ten (10%) identify some other type of product (e.g. water), while 15 percent are unable to offer a guess as to what flows through this pipeline.

Gas products are most widely mentioned by landowners living in New Brunswick/Nova Scotia and British Columbia, while oil is comparatively more commonly identified in Saskatchewan/Manitoba and Ontario, as well as among landowners with residential and agricultural property. Some landowners identified more than one product in their local pipeline (multiple responses were accepted if volunteered). The inability to identify any product is most common among women and agricultural landowners, and least evident among those living in New Brunswick/Nova Scotia.

Type of fuel flowing through pipeline

Natural gas	64
Natural gas	58
Gas (non-specific)	4
Sour gas	2
Sweet gas	1
Other type	1
Oil	37
Oil	29
Gasoline	5
Propane	4
Diesel	2
Butane	2
Jet fuel	1
Other	10
dk/na	5

Total exceeds 100 percent because landowners can provide more than one response

Q.7

Could you tell me what type of product or fuel flows through the pipeline that crosses your land?

² Information was not available by which to assess the accuracy of landowners' understanding of what type of fuel flows through the pipeline crossing their property.

Awareness of Safety Procedures

Most landowners are familiar with some of the basic safety procedures involved in having a pipeline on their property, including excavation requirements and who to contact in the case of an emergency.

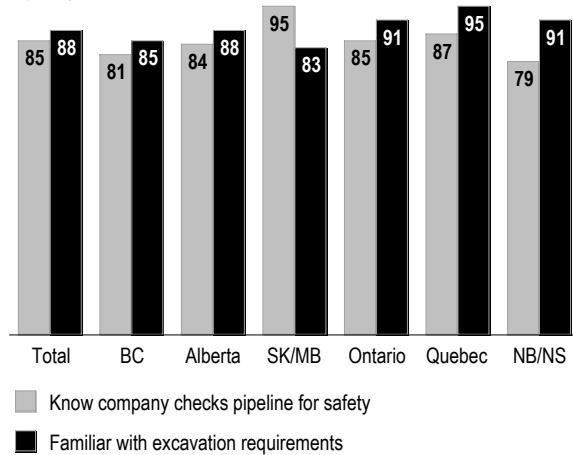
COMPANY SAFETY INSPECTIONS. Landowners were asked about whether or not they know if the local pipeline company checks the safety of the pipeline on their property. A large majority (85%) affirm that this is in fact the case, while the remainder say it is not (7%) or are unsure (8%). Awareness of such inspections is the norm across the country, but is most widespread in Saskatchewan/Manitoba and least so in New Brunswick/Nova Scotia.

EXCAVATION REQUIREMENTS. Landowners do appear to be well informed about the importance of caution in excavating around the pipeline on their property. Almost nine in ten (88%) say they are familiar with the requirements that are to be followed when doing any excavations in the vicinity of the pipeline. Reported awareness is strong across the country, although marginally lower in B.C. (85%) and Saskatchewan/Manitoba (83%).

Among the minority (12%) of landowners who indicate they are not familiar with excavation requirements, two-thirds (66%, or 13% of all landowners surveyed) express an interest in receiving a copy of these requirements.

Aware of safety practices

By region



Q.8

To the best of your knowledge, does the pipeline company check the safety of the pipeline on your property?

Q.9

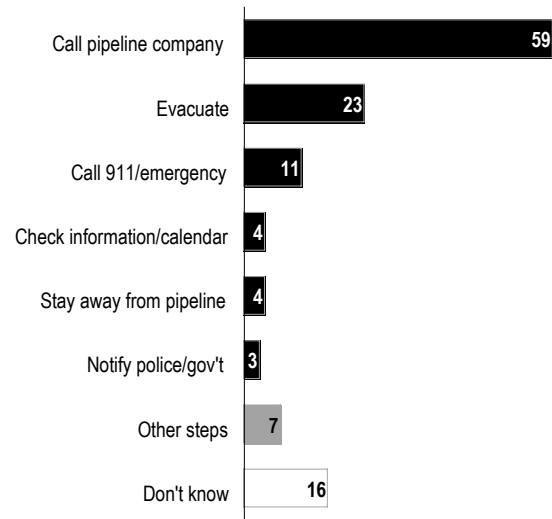
Are you familiar with the requirements that have to be followed when excavating near a pipeline?

WHO TO CONTACT IN AN EMERGENCY. Most landowners across the country believe the pipeline company is the first point of contact for any issues of concern or emergencies pertaining to the pipeline on their property. When asked (unprompted) who they would contact about any concerns they might have about the pipeline on their property, almost eight in ten (79%) identify their local pipeline company. Of the remainder, most mention a phone number or centre they would call (e.g., One call centre, Alberta First Call). Very few say they would contact the National Energy Board (2%), 911 or the police (2%), or another government agency (1%). Seven percent could not identify anyone they would contact about pipeline concerns. Responses to this question are generally similar across the country, although mention of the NEB is higher among those landowners who have contacted the NEB in the past five years.

When asked more specifically about what they would do in an emergency caused by the pipeline on or near their property, more than eight in ten (83%) are able to provide a meaningful response. Once again, landowners are most likely to say they would telephone the pipeline company (59%), while smaller percentages mention other actions such as evacuation or calling 911.

The company is the first source of contact for landowners across all regions, but this is more likely to be mentioned by landowners in Saskatchewan, Manitoba, Ontario and Quebec, and less apt to be the case in New Brunswick/Nova Scotia, where landowners are more likely than elsewhere to call 911 or say they do not know what to do in the case of a pipeline emergency. Evacuation is more commonly mentioned in B.C. and Alberta than elsewhere. Across the country, uncertainty about what to do in emergencies is higher among landowners who identify their local pipeline as carrying natural gas, and among those whose dwelling is more than 1,000 metres from the pipeline.

What to do in case of pipeline emergency



Total exceeds 100 percent because landowners can provide more than one response

Q.12

Do you know what to do in the case of an emergency caused by the pipeline?

Perceptions of Pipeline Safety

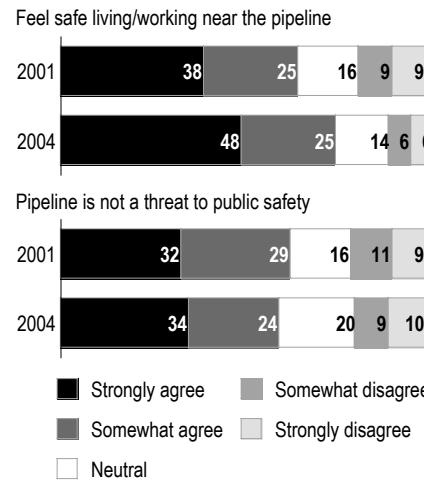
Landowners generally feel safe having a pipeline on their property and have confidence in the company operating it. At the same time, landowners are somewhat less confident in NEB monitoring, and a plurality believe there is a need for greater government control.

The survey included a number of “agree-disagree” statements intended to measure landowners’ perceptions about the safety of energy pipelines. These questions were taken from a previous survey of landowners commissioned by the NEB in 2001.³

SAFETY OF LOCAL PIPELINE. Most landowners express little or no concern about the safety of the pipeline crossing their property. Almost three-quarters (73%) agree that “they feel safe living and working near the pipeline”, and a smaller majority (58%) agree that this pipeline “is not a threat to public safety.” Those who do not agree with these statements are evenly split between those who are “neutral” and those who clearly disagree.

Comparison with the 2001 Satisfaction Survey of Landowners suggests that landowners have become somewhat more confident in pipeline safety over the past three years, with the percentage in strong agreement having increased by 10 points over this time period. Views on this issue are generally similar across the country. Belief in the local pipeline not being a threat is marginally stronger in Saskatchewan/Manitoba (64%) and weakest in Quebec (51%, versus 24% who disagree). Perceptions of pipeline safety are noticeably lower among the small group of landowners (N=55) who have contacted the NEB in the past five years, in many cases because of concerns about the pipeline (see below).

Perceptions of local pipeline safety



Q.13ab

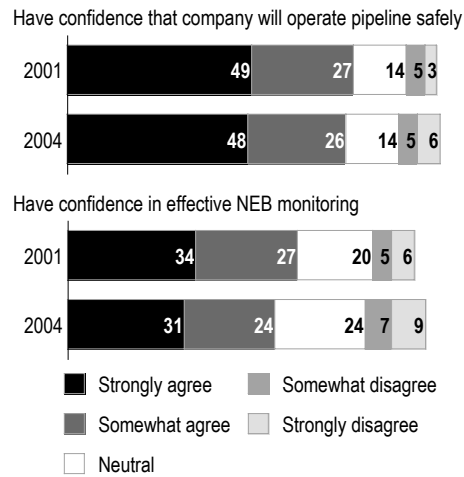
I would now like to ask you some general questions about how you feel about living or working near a pipeline. Please tell me the extent to which you agree with each of the following statements, where “1” means “strongly disagree” and “5” means “strongly agree” ... You feel safe living and working near the pipeline ... The pipeline is not a threat to public safety.

³ Satisfaction Survey of Landowners, 2001, conducted by Key Concepts Ltd. on behalf of the NEB. Results from this survey cannot be strictly compared with the current survey, in part because of differences in sample composition, and in part because the response categories in 2004 have been modified to conform to CMT standards.

CONFIDENCE IN LOCAL PIPELINE OPERATION. Landowners are also more likely than not to express confidence in the way in which the local pipeline is being operated, although less sure about the oversight carried out by the NEB. Almost three-quarters (74%) agree that they “have confidence that the company will operate the pipeline safely”, compared with only one in ten (11%) who disagree. Fewer than six in ten (55%), however, agree they “have confidence that the NEB will monitor the company’s performance effectively”, compared with 16 percent who disagree. These results are very similar to those recorded in 2001.

Confidence in the company operations is strongest in Saskatchewan/Manitoba (85% agree) and lower in Ontario (70%) and Quebec (71%). Confidence in the NEB is strongest in New Brunswick/Nova Scotia (67%) and Saskatchewan/Manitoba (65%), and lowest in B.C. (50%). Among the small group of landowners who have contacted the NEB in the past five years, only 31 percent express confidence in its capability to monitor company performance, compared with 53 percent who disagree.

Confidence in local pipeline operation



Q.13cd

I would now like to ask you some general questions about how you feel about living or working near a pipeline. Please tell me the extent to which you agree with each of the following statements, where “1” means “strongly disagree” and “5” means “strongly agree” ... You have confidence that the company will operate the pipeline safely ... You have confidence that the NEB will monitor the company’s performance effectively.

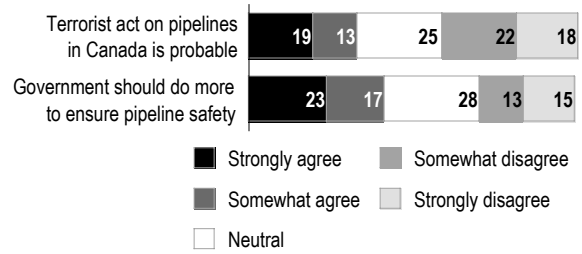
NEED FOR GOVERNMENT CONTROLS. Landowners were also given a couple of statements about the need for more government oversight over pipeline operations.

A plurality (40%) of landowners agree with the statement that “the government should do more to ensure the safety of pipelines in Canada”, compared with 28 percent who disagree. The remainder are either neutral or have no opinion on this statement. Agreement with this statement is highest in New Brunswick/Nova Scotia (47%) and lowest in Saskatchewan/Manitoba (33%).

A more indirect way at looking at the perceived need for government intervention is through expressed concerns about terrorist threats to the country’s pipelines. One-third (32%) of landowners agree with the statement “A terrorist act on pipelines in Canada is probable”, while a larger proportion (40%) disagree.

Agreement with this statement is most evident in Alberta (43%) and least so in Quebec (25%). As might be expected, landowners who believe in the likelihood of terrorist acts against pipelines are much more supportive of increased government involvement (52%) than are those who believe such a threat is remote (29%).

Need greater controls for pipeline safety



Q.13ef

I would now like to ask you some general questions about how you feel about living or working near a pipeline. Please tell me the extent to which you agree with each of the following statements, where “1” means “strongly disagree” and “5” means “strongly agree” ... A terrorist act on pipelines in Canada is probable ... The government should do more to ensure the safety of pipelines in Canada.

COMPANY COMMUNICATIONS

The survey covered landowners' experiences with contact initiated by the company operating the pipeline crossing their property.

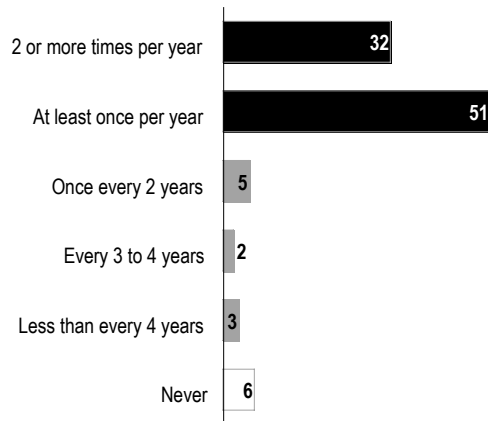
Frequency of Company Contact

Most landowners hear from their pipeline company at least once a year, typically by mail or through in-person visits. Such contacts are most likely to be about safety programs, but also about accessibility issues, construction, property rights or encroachments.

Almost all (93%) of the landowners surveyed report to have been contacted by the company operating the pipeline that crosses their property. Most hear from the company at least once a year, and close to one-third (32%) say this happens at least twice a year.

Frequent contact (two or more times per year) is most commonly reported by landowners in New Brunswick/ Nova Scotia and Alberta, by those with more recent land tenure (less than 11 years), those whose dwelling is within 100 metres of the pipeline, and landowners who have made more contacts with either the company or the NEB in the past five years.

How often contacted by pipeline company



Q.14

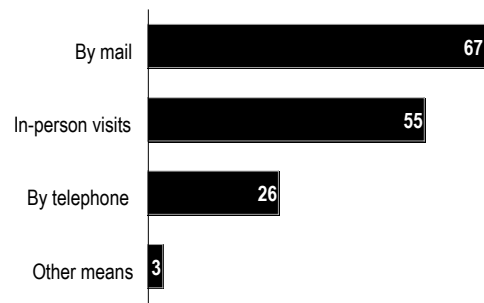
How often does this company contact you? Is it ...?

Landowners are most likely to report that their local pipeline company contacts them by mail (including annual calendars, brochures and newsletters) (67%) or in-person visits (55%), with fewer indicating telephone contact or by other means (e.g., open houses, e-mail). Mail is most widely indicated by landowners in Quebec and New Brunswick/Nova Scotia, while in-person visits are the most commonly reported method in Saskatchewan/Manitoba and Ontario. Telephone is not a primary means of company contact in any region, but is more apt to be reported in B.C.

Landowners were also asked whether they were contacted by their pipeline company for any of five specific reasons within the past two years. Landowners are most likely to say they were contacted about safety or emergency programs (49%), with fewer indicating such contact related to accessibility issues (e.g., crossing with a vehicle) (35%), construction or new development (31%), property rights or easement issues (26%) or encroachments (e.g., buildings on the right-of-way) (18%). One in four landowners say they were contacted by the pipeline company for other reasons, the most common being maintenance or repair work (8%), courtesy calls (5%) or notification of upcoming work (4%). Landowners report an average of two out of this list of possible reasons, with this average slightly higher in B.C. (2.1) and lowest in Quebec and New Brunswick/Nova Scotia (1.4).

Company contact for safety reasons is more widely reported by landowners with dwellings in closer proximity to the pipeline, as well as by those with more recent tenure on the property. Landowners in New Brunswick/Nova Scotia are less likely than others to report company contact for this reason (27%). Contact about accessibility issues is most widely reported in Saskatchewan/Manitoba, while construction/new development and encroachment issues come up most commonly in B.C.

Method of contact by company



N=1,039

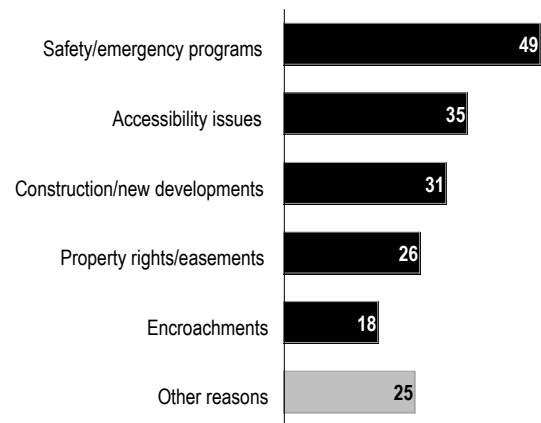
Total exceeds 100 percent because landowners can give more than one response

Q.15

How does the company typically contact you?

Subsample: Those who have had contact with the company that operates the pipeline on their property

Reasons for contact by pipeline company



N=1,039

Total exceeds 100 percent because landowners can give more than one response

Q.16

In the past two years, has the company contacted you for any of the following reasons related to the pipeline on your property ...

Safety or emergency programs ... Construction or new developments ... Property rights or easements ... Accessibility issues, such as crossing over the pipeline with a vehicle ... Encroachments, such as buildings near the pipelines ... For any other reason?

Subsample: Those who have had contact with the company that operates the pipeline on their property

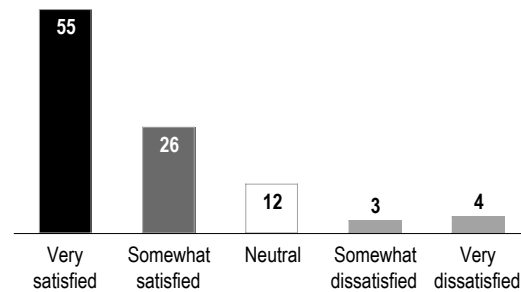
Satisfaction with Most Recent Contact

Almost all landowners are satisfied with their most recent contact from the local pipeline company.

Landowners who had been contacted by the company for any reason in the past two years were asked about their level of satisfaction with their most recent contact. Landowners express a high degree of satisfaction with this company contact, with eight in ten saying they are very satisfied (55%) or satisfied (26%), compared with only a few (7%) who express dissatisfaction. Satisfaction levels are high across the country, but noticeably lower in B.C. (70%) and Alberta (74%) than elsewhere. Satisfaction with this contact is also higher among landowners who themselves had not initiated contact with the company for more than two years (80%).

The few (N=58) landowners expressing dissatisfaction with their recent contact give a number of reasons for this assessment, none of which predominate. Equally small percentages of this group give as reasons their lack of control or say over company decisions, a poor attitude on the part of company representatives, lack of resolution of outstanding issues, inadequate financial compensation or lack of trust in the company. None of these responses was given by more than 10 of the landowners interviewed for this survey.

Satisfaction with most recent company contact



N=798

Q.17

Overall, how satisfied were you with your most recent contact from the pipeline company? Please rate your experience, with "1" being "very dissatisfied" and "5" being "very satisfied."

Subsample: Those who have had contact with the company that operates the pipeline on their property for any of the reasons mentioned in Q.16

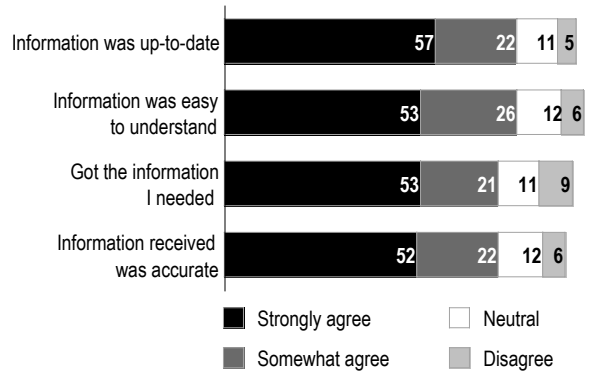
Satisfaction with Company-supplied Information

A strong majority of landowners are satisfied with the information they have received from their local pipeline company over the past two years.

Landowners were asked to evaluate the information they have received by their local pipeline company over the past two years. The results show that a majority of landowners are fully satisfied with the company-supplied information. At least three-quarters of those surveyed either strongly agree or agree that the information they received from the company was up-to-date (79%), easy to understand (79%), was what they needed (74%) and accurate (74%). In all cases more than half “strongly” agree with these statements, while fewer than one in ten disagree.

Positive assessments of company-supplied information are the norm across the country, with relatively minor variations. The strongest ratings are given by landowners in Saskatchewan/Manitoba and New Brunswick/Nova Scotia, as well as among those who had not themselves contacted the company or NEB in more than two years (e.g., least apt to have had any concerns that would prompt such contact). As with other ratings on this survey, those landowners who have contacted the NEB in the past two years (e.g., likely because of concerns related to the local pipeline) are noticeably less likely than others to strongly agree about the quality of the company-supplied information, although a majority of this group gives a positive assessment overall.

Satisfaction with information provided by company



N=1,039

Q.19

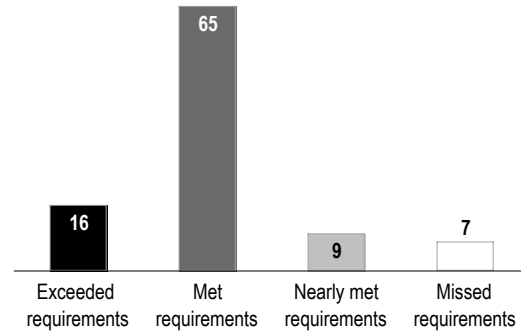
I would like to know how satisfied you were with the information provided by the pipeline company over the past two years. Please tell me the extent to which you agree with each of the following statements, where “1” means “strongly disagree” and “5” means “strongly agree” ... The information was easy to understand ... The information you received was up-to-date ... You received accurate information ... You got the information you needed. Subsample: Those who have had contact with the company that operates the pipeline on their property

This positive assessment of company information is further confirmed in more global terms, as eight in ten landowners say the company has either exceeded (16%) or met (65%) their personal requirements for information as it pertains to the pipeline on their property. The remainder indicate either that the information “nearly met” their needs (a category that captures those who prefer to be “politely” negative) or “missed” their requirements altogether.

As with the specific ratings of information quality, landowners’ requirements for pipeline-related information were met in a large majority of cases across the country. The likelihood of “exceeding” expectations, however, is marginally greater in Ontario (20%) and lowest in B.C. (8%). On the other end of the scale, the chances of failing to meet landowner requirements are lowest in Saskatchewan/Manitoba (2%) and Quebec (3%), and highest among owners of industrial properties (12%).

The minority (16% of the population) of landowners who say company-supplied information did not fully meet their requirements offer a number of reasons for this assessment. This group is most likely to say they did not receive the type of information they need or expected (58%), either because there was too little information, were not notified of key issues or events or felt misled. Others say the company was not sufficiently responsive to their needs or requests (26%), were dissatisfied with company-related property damage (14%) or for other reasons (e.g., company incompetence) (16%). It is important to note that these responses come from a small group of landowners, which is too small to permit analysis by region or other subgroups.

Company information met requirements



N=1,039

Q.20

Overall, would you say the company has exceeded, met, nearly met, or missed your requirements for information as it pertains to the pipeline on your property?

Subsample: Those who have had contact with the company that operates the pipeline on their property

Drivers of Satisfaction with Company Information

Getting the information needed is the strongest predictor of landowners' overall satisfaction with company-supplied information, followed by receiving information that is accurate.

In addition to evaluating landowners' satisfaction with company-supplied information pertinent to local pipeline issues, further analysis was undertaken to identify which aspects of this information are most likely to contribute to satisfaction with this material. This was accomplished using a "derived importance" analytical technique that identifies the extent to which service expectations have been met among those landowners who care most about a particular aspect of service.⁴

This analysis reveals that two aspects are important in determining landowners' overall satisfaction with company-supplied information. First and foremost, satisfaction is most significantly determined by whether or not landowners agree that they "got the information they needed." The strength of this relationship is presented as a "beta weight" of .43 (out of a possible 1.0). In statistical terms this is a very strong relationship and means that this aspect is a particularly strong "driver" of satisfaction.

The second significant aspect driving satisfaction is receiving "information that was accurate", with a beta weight of .17. Because beta weights provide a proportional measure of association, it can be concluded that the first aspect (getting the information needed) is more than twice as strong a predictor as the second.

The other two aspects of information tested (information was easy to understand, information was up-to-date) did not prove to be significant predictors of overall satisfaction with company-supplied information, and are therefore of much less importance to landowners.

Drivers of satisfaction with company information

ASPECT OF COMPANY INFORMATION	BETA
Got the information I needed	.43
Information received was accurate	.17
Information was easy to understand	.08
Information was up-to-date	.06

N=892

Beta represents the strength of the association between the aspect tested and the overall measure of landowner satisfaction with company information (Q.20)

Betas in bold type are statistically significant at $p < .01$

This model explains 34% of the variance in overall satisfaction with company information (R^2)

⁴ A detailed description of the derived importance approach is presented in the Methodology section of this report

NEB PUBLICATIONS

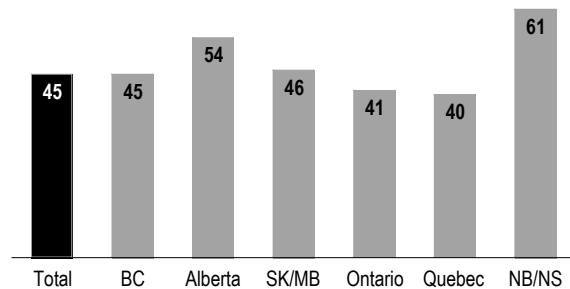
Receipt of NEB Information Through the Pipeline Company

Close to half of landowners across the country recall receiving NEB publications through their pipeline company, particularly those dealing with pipeline safety and how to contact the NEB.

NEB publications are an important component of the information that landowners have received from their pipeline company over the past two years. Close to half (45%) of landowners surveyed report to have received NEB publications directly from their pipeline company, with another 21 percent unsure whether they have or not (some individuals may not be able to recall the source of some of the information they received). Company-supplied NEB publications are most likely to be reported by landowners in New Brunswick/Nova Scotia and Alberta.

In terms of specific publications, landowners who have received NEB information from companies are most likely to recall the publications “Living and Working Near Pipelines” (85% of this group, or 38% of all landowners) and “How to Contact the NEB” (83%), and “Pipeline Crossing Regulations” (72%). Fewer than half say the company provided them with the publication on “NEB Hearings” (44%). About one in ten (10%) recall receiving NEB material on other topics, such as safety, new plans or projects, landowners’ rights or general information on the NEB. Receipt of this material through the company does not vary significantly across regions.

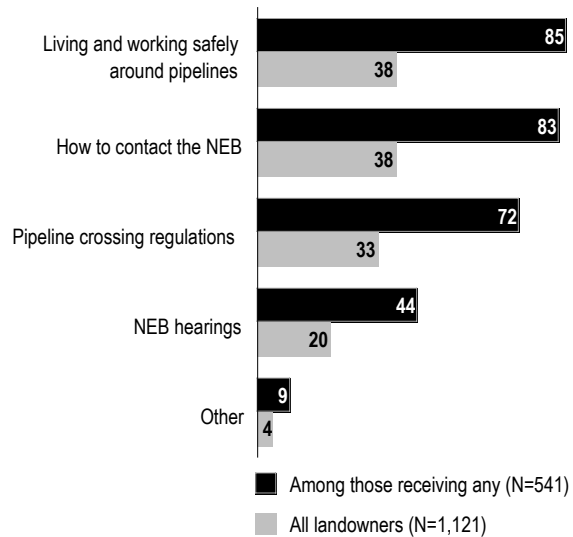
Received NEB publications from pipeline company
By region



Q.22

Has the pipeline company provided you with any publications prepared by the National Energy Board?

NEB publications received



Q.23

Which of the following topics are covered in the NEB publications you have received ...?

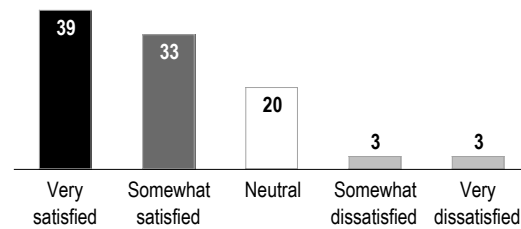
Satisfaction with NEB Publications

Most landowners are fully satisfied with the NEB publications they received through the pipeline company, in terms of providing them with information that is current, accurate, consistent and relevant to their needs.

Consistent with their assessment of company-supplied information in general, most landowners are satisfied with the NEB publications received through the company. More than seven in ten are very (39%) or somewhat (33%) satisfied with this material, compared with only six percent who express dissatisfaction. Positive reviews are given across the country, but strong satisfaction is most evident in Quebec (55%) and least so in B.C. (33%) and Alberta (35%).

Landowners are positive about a number of specific aspects of the NEB information they have received. Strong majorities agree that these publications are up to date (80%), easy to understand (77%), provided the information they needed (76%), are accurate (75%), and are consistent (73%). Assessments are largely consistent across regions. Few (<10%) disagree about any of these aspects of the NEB publications they recall receiving through the company.

Overall satisfaction with NEB publications



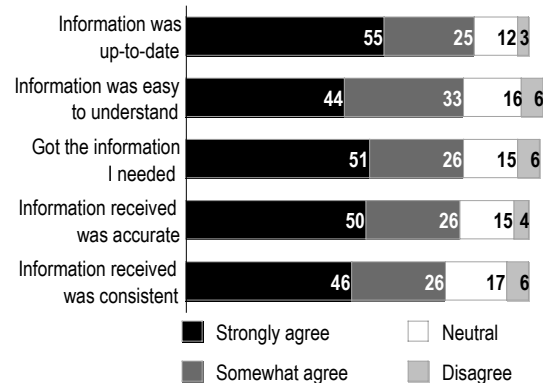
N=481

Q.25

Overall, how satisfied were you with the information you received from the NEB? Please rate this information, with "1" being "very dissatisfied" and "5" being "very satisfied."

Subsample: Those who have received any publications prepared by the NEB

Satisfaction with specific aspects of NEB publications



N=481

Q.26

Thinking more specifically about the NEB information you have received, please tell me the extent to which you agree with each of the following statements, where "1" means "strongly disagree" and "5" means "strongly agree" ... The information was easy to understand ... The information you received was up-to-date ... You received consistent information ... You received accurate information ... You got the information you needed.

Subsample: Those who have received any publications prepared by the NEB

Drivers of Satisfaction with NEB Publications

Overall satisfaction with NEB publications is most likely to be determined by the extent to which landowners believe they received the information they needed, and found it easy to understand.

As with company-supplied information, a derived importance analysis was conducted to identify the key drivers of landowner satisfaction with NEB publications. In this case, four specific aspects were all found to be significant predictors of overall satisfaction, although none of these stand out as dominant. The strongest driver of satisfaction with NEB publications is “getting the information needed” (as was the case with company-supplied information), with a beta weight of .29, followed closely by “information being easy to understand (.27).

Following these are two further aspects with approximately half the impact, including “information that is consistent” (.14) and information being accurate” (.13). The fifth aspect, “information that is up-to-date” did not prove to be a significant predictor, and is therefore of little importance in determining landowner satisfaction with NEB publications.

Awareness of the NEB

More than eight in ten landowners have at least a passing awareness of the National Energy Board, but familiarity is notably lower in Quebec and in urban areas.

While landowners deal primarily with local companies on pipeline issues, most (82%) say they have heard of the National Energy Board prior to this survey. Awareness is high across most of the country, but noticeably lower among landowners in Quebec, and those living in urban areas. Awareness of the NEB increases along with length of tenure on the property.

Drivers of satisfaction with NEB publications

ASPECT OF NEB PUBLICATIONS	BETA
Got the information I needed	.29
Information was easy to understand	.27
Information received was consistent	.14
Information received was accurate	.13
Information was up-to-date	.06

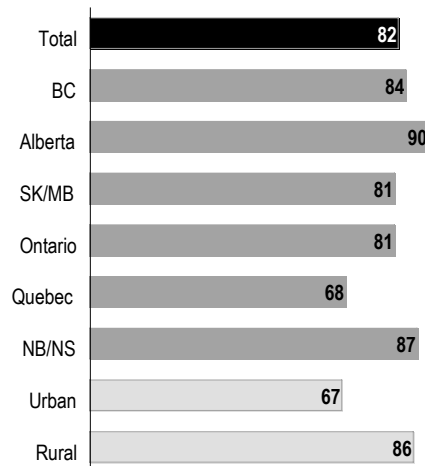
N=465

Beta represents the strength of the association between the aspect tested and the overall measure of landowner satisfaction with NEB publications (Q.25)

Betas in bold type are statistically significant at $p < .01$

This model explains 55% of the variance in overall satisfaction with NEB publications (R^2)

Previously heard of NEB



Q.27

Had you heard of the National Energy Board, prior to this survey?

LANDOWNER CONTACT WITH THE COMPANY

Landowner Contact with the Company

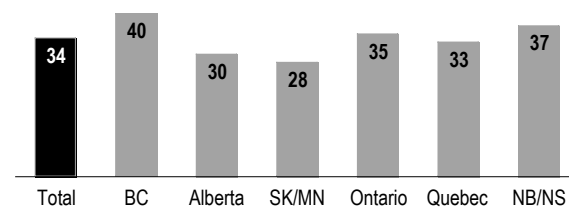
One-third of landowners have initiated contact with their pipeline company within the past five years, mostly relating to construction issues, property damage or compensation.

Not only have landowners been contacted by the local pipeline company, but many have initiated such contact. One-third (34%) of the landowners surveyed report to have gotten in touch with their company in the past five years. By comparison, only five percent have contacted the NEB over this time period (with about two-thirds of this group (3% of all landowners) reporting to have contacted both their company and the NEB).

Landowner-initiated contact with pipeline companies is somewhat more likely in B.C., and among landowners with dwellings within 500 metres of the pipeline. Such contact is least apt to be reported by those living in Saskatchewan/Manitoba.

While only a minority of landowners have initiated contact with their local pipeline company, this group has done so with relative frequency. Almost three-quarters (72%) of this group report to have made such contacts more than once, and one in three have done so five or more times over the past five years. The mean number of landowner-initiated contacts over this time period is 6.0. This average is highest in B.C. (9.5 contacts) and any owners of industrial property (11.2), while lowest in Quebec (2.7).

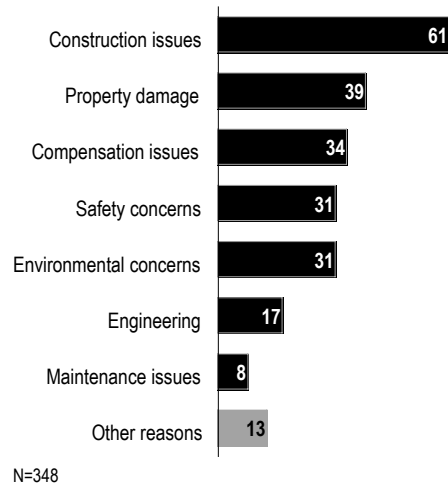
Contacted company – past 5 years By region



Q.28

In the past five years, have you contacted either the pipeline company or the NEB for any reason?

Reasons for contacting company



Q.30

Did you contact (the company or the NEB) for any of the following reasons ...?

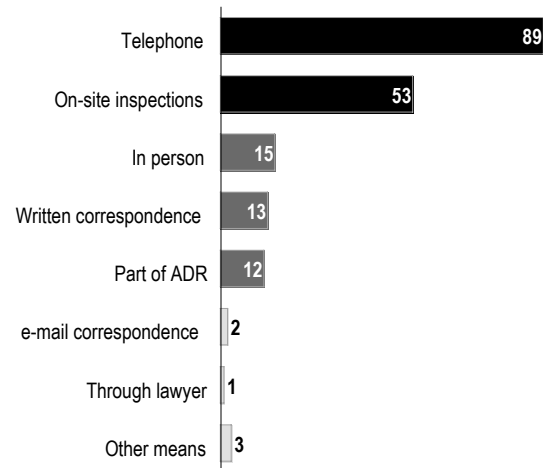
Subsample: Those who have contacted the pipeline company

The recency of company contacts varies. Relatively few (16%) landowners report they last contacted the pipeline company within the past six months, and most (62%) have not done so for more than a year. Recent contacts (<6 months) are most common in B.C. (25%) and least so in Ontario (7%) and New Brunswick/Nova Scotia (5%).

Landowners are contacting pipeline companies for a number of reasons, but most commonly because of issues related to construction on or near their property (61%). Smaller but significant numbers report getting in touch with the company with respect to property damage (39%), compensation issues (34%), safety (31%) and environmental or reclamation concerns (31%). These types of reasons are more apt to be mentioned by landowners in western provinces, notably Alberta in the case of construction and environmental issues.

Landowners were asked about how they ended up communicating with their pipeline company as a result of their most recent contact. In most cases, landowners' interaction with the company involved telephone conversations (89%) or on-site inspections (53%). Relatively few landowners indicate these contacts resulted in a different type of in-person visit or meeting with company representatives (15%), written correspondence (13%) or an appropriate dispute resolution (ADR) process (12%).

Method of communication with company



N=348

Total exceeds 100 percent because landowners can identify more than one response

Q.33

In which of the following ways did you communicate with the {company/NEB} as a result of contacting them about this problem or concern? Was this through ...?

Subsample: Those who have contacted the pipeline company

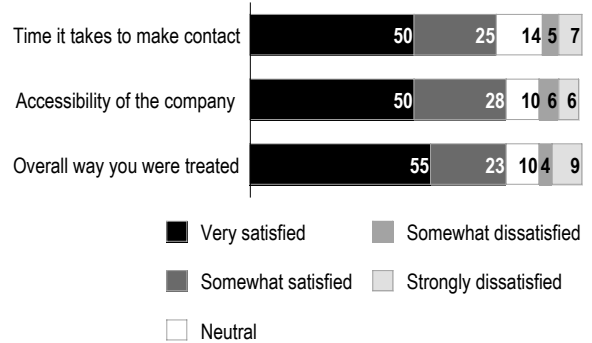
Satisfaction with Most Recent Company Contact

Most landowners are satisfied with the response they received from companies when contacting them about a problem or concern about the pipeline on their property.

As with their experience with company-initiated contacts, most landowners are positive about the response they receive when deciding to approach the company about an issue or concern. More than three-quarters are satisfied (and at least 50% very satisfied) with their most recent company contact, in terms of the time it took to make a successful contact (75%), the accessibility of the company (78%) and the way in which they were treated (77%). In each case no more than 13 percent express dissatisfaction with this contact. Satisfaction levels are high across the country, but marginally higher in Quebec, and noticeably lower in Alberta.

The few (N=41) who are dissatisfied with the way they were treated when contacting the company give a number of reasons, none of which is mentioned by more than a handful of landowners. Complaints include the fact that they are still waiting for a response from the company on their issue, because staff is not being responsive, because the company did not do an adequate job of what was requested, because the company did not properly answer their questions, nor provide an appropriate amount of compensation for damage, or for a number of other miscellaneous reasons.

Satisfaction with most recent communication with company



N=348

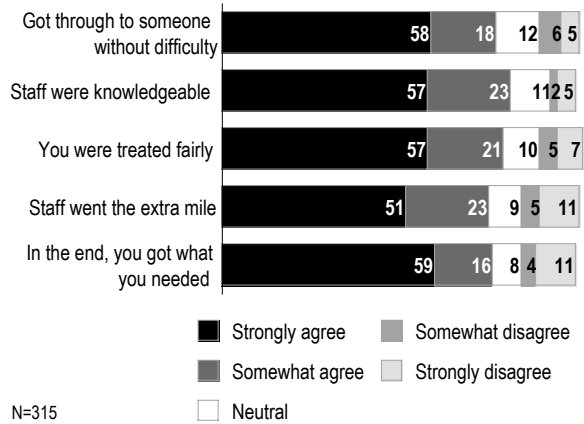
Q.34

How satisfied were you with your most recent communication with the {company/NEB} about this problem or concern in terms of the following, with "1" meaning "very dissatisfied" and "5" meaning "very satisfied." How satisfied were you with ... the amount of time it took to make successful contact with the {company/NEB} on this occasion ... the accessibility of the {company/NEB} ... the overall way in which you were treated by the {company/NEB} on this occasion?

Subsample: Those who have contacted the pipeline company

Landowners' experience with local pipeline companies was further examined through an additional set of questions drawn from the Common Measurements Tool (CMT). Consistent with the results presented above, most landowners express satisfaction with their most recent company contact. Large majorities agree or strongly agree that they got through to someone without difficulty (76%), encountered staff who were knowledgeable (80%) and who went the extra mile to help them (74%), were treated fairly (78%), and in the end got what they needed (75%). Once again, ratings are comparable across regions, but somewhat higher in Quebec and lower in Alberta.

Satisfaction with most recent experience with company



Q.36

I would like to ask you more specifically about your most recent experience with the {company/NEB} when you contacted them about this issue or concern. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where "1" means "strongly disagree" and "5" means "strongly agree" ... You were able to get through to someone without difficulty ... The staff you dealt with were knowledgeable and competent ... You were treated fairly ... Staff went the extra mile to make sure you got what you needed ... In the end, you got what you needed.

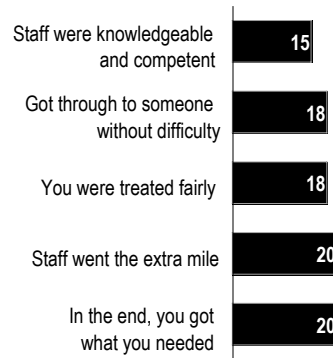
Subsample: Those who have contacted the pipeline company

GAP ANALYSIS. Another way to evaluate company performance in meeting landowner expectations is to examine satisfaction ratings in the context of the importance placed on each aspect of service. This analysis was performed using a “gap analysis” methodology drawn from research techniques used to evaluate customer service quality among leading private sector service providers.

This analysis was conducted as follows. First, the subset of landowners who rated this type of information as “very important” were identified -- this is the segment of the population for whom this aspect of service really matters. Second, within this subgroup, the proportion who are not clearly satisfied with each particular service aspect is identified (in this case those who disagree or offer a neutral response). This percentage represents the “service gap”, which is the proportion of the landowner population for whom each aspect of service is important, but not being effectively provided. The larger the percentage, the larger the gap and the less effectively landowners’ needs are being met.

Examination of the gap analysis data for company contacts reveals relatively small gaps of 15 to 20 percentage points across the five service aspects measured on this survey. These represent small gaps by broader industry standards, and provide further evidence that pipeline companies are effective in meeting the service contact expectations of most Canadian landowners.

Satisfaction with company contact – GAP analysis



N=192-206

GAP analysis is calculated as the percentage of landowners who consider this aspect of service to be very important (Q.43a-e) who do not think that the company has delivered on it during their most recent contact (i.e., ratings of neutral or disagree)

Q.36

I would like to ask you more specifically about your most recent experience with the {company}/NEB when you contacted them about this issue or concern. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where “1” means “strongly disagree” and “5” means “strongly agree” ... You were able to get through to someone without difficulty ... The staff you dealt with were knowledgeable and competent ... You were treated fairly ... Staff went the extra mile to make sure you got what you needed ... In the end, you got what you needed.

Subsample: Those who have contacted the pipeline company

LANDOWNER CONTACT WITH THE NEB

Landowner Contact with the NEB

A very small proportion of landowners have initiated contact with the NEB over the past five years, and in almost half of these cases this contact took place more than two years ago.

While a sizeable minority of landowners have been in contact with their local pipeline company over the past five years, very few (5%) report to have contacted the National Energy Board for any reason over this same time period. Of this group, about two-thirds (3%) say they have contacted both their company and the NEB, while the remainder (2%) contacted only the latter.

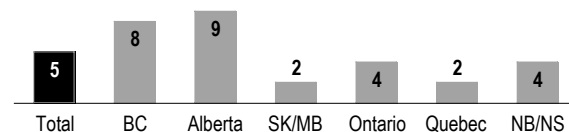
Landowner contact with the NEB is most common in B.C. (8%) and Alberta (9%), than in regions to the East. Such contact also increases as dwelling distance from the pipeline decreases (contact was made by only 2% of landowners whose dwelling is more than 1,000 metres from the pipeline, increasing to 8% among those who live or work within 100 metres).

Given the relatively small incidence of NEB contact, the resulting subsample of landowners (N=61) is too small to provide for an in-depth analysis of their experiences when contacting the Board. The following sections present the results of these questions, which can be considered valid but not precise measures of landowner opinions.

EXTENT OF CONTACT. Among those landowners who have contacted the NEB over the past five years, a majority have done so either once (36%) or twice (29%). However, some landowners have made repeated contacts (some more than 10), pushing the overall average up to 5.7 contacts.

Contacted NEB – past 5 years

By region



Q.28

In the past five years, have you contacted either the pipeline company or the NEB for any reason?

REASONS FOR CONTACT. Landowners report contacting the NEB for a number of reasons, most commonly because of construction issues (61%), property damage (58%), but also as a result of compensation issues (53%), environmental concerns or reclamation (48%), safety concerns (46%) and engineering issues (33%). One in four from this group identify other issues, such as access or trespassing, to update information about themselves, and legal/arbitration.

MOST RECENT CONTACT. NEB contacts in most cases have not been recent. Three in ten (30%) say their most recent contact has been within the past 12 months, and almost half (47%) have not done so for more than two years.

METHOD OF CONTACT. As with their communication with pipeline companies, landowners are most likely to have been in contact with the NEB by telephone (66%), but almost as much by written correspondence (54%). Less common are contacts as part of an ADR (35%), a property inspection (14%), other in-person contact (12%) or by e-mail (12%).

Satisfaction with NEB Contact

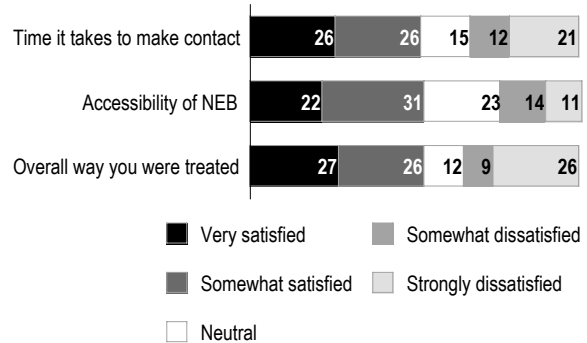
Landowners are generally satisfied with their most recent contact with the NEB.

GENERAL SATISFACTION WITH CONTACT. A small majority of this landowner group expresses satisfaction with their most recent NEB contact, in terms of the amount of time it took to make successful contact (52%), the accessibility of the NEB (53%) and the way in which they were treated (53%). Roughly one in three are dissatisfied in these aspects of this contact, except in the case of accessibility in which a proportionately greater number are neutral in their assessment (it may be that some landowners were unsure about exactly what was meant by “accessibility” in this context).

The small size of this subgroup limits the analysis and conclusiveness of these findings, but the data suggest that those who contacted the NEB in the past six months are more apt to be dissatisfied, compared with landowners whose experience was prior to this period.

Those expressing dissatisfaction with how they were treated by the NEB (N=22) were asked to give reasons for this assessment. No one issue emerges from their responses (and the small size of this group limits any conclusive findings), but what is most likely to be mentioned is the view that the NEB did not take their problem or issue seriously, or that they are still waiting for a response or resolution.

Satisfaction with most recent communication with NEB



N=61

Caution: These results are based on a small subsample of landowners and should therefore be interpreted as directional rather than conclusive

Q.34

How satisfied were you with your most recent communication with the {company/NEB} about this problem or concern in terms of the following, with “1” meaning “very dissatisfied” and “5” meaning “very satisfied.” How satisfied were you with ... the amount of time it took to make successful contact with the {company/NEB} on this occasion ... with the accessibility of the {company/NEB} ... the overall way in which you were treated by the {company/NEB} on this occasion?

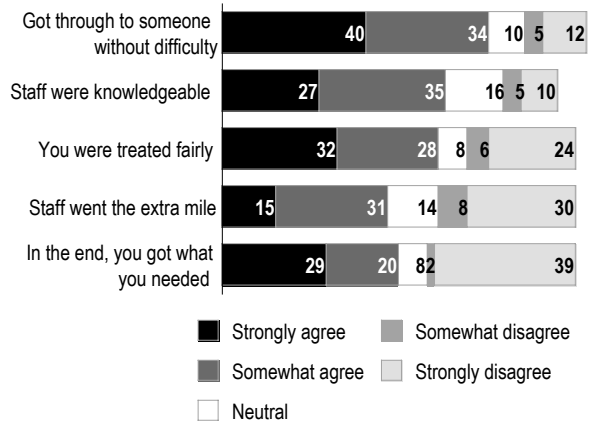
Subsample: Those who have contacted the NEB

SATISFACTION WITH THE CONTACT EXPERIENCE. As with assessments of pipeline company contacts, landowners who have contacted the NEB in the past five years were also asked to rate their most recent experience on five specific dimensions that form part of the CMT Core. Once again, the small size of this group provides for only a high-level analysis of the results.

Landowners are most likely to be positive in rating their most recent NEB contact in terms of being able to get through without difficulty (74% agree), finding staff that were knowledgeable and competent (62%) and being treated fairly (60%). In the first two cases, just over one in six (17%) express dissatisfaction, with this percentage doubling in the case of being treated fairly (30%).

Landowners are noticeably less likely to agree that the NEB staff they encountered were willing to go the extra mile to make sure they got what they needed (46% agree, versus 38% disagree) or that in the end they got what they needed (49%, versus 41%). In all of five of these areas, landowners making more recent contact are the ones most apt to be dissatisfied with this experience.

Satisfaction with most recent experience with NEB



N=61

Caution: These results are based on a small subsample of landowners and should therefore be interpreted as directional rather than conclusive

Q.36

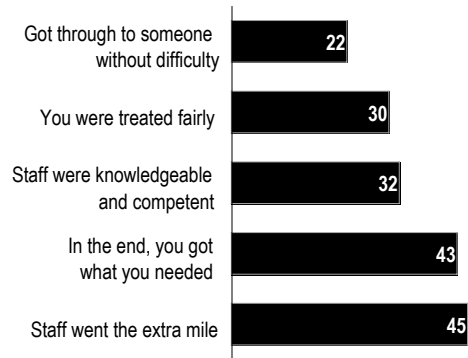
I would like to ask you more specifically about your most recent experience with the {company/NEB} when you contacted them about this issue or concern. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where "1" means "strongly disagree" and "5" means "strongly agree" ... You were able to get through to someone without difficulty ... The staff you dealt with were knowledgeable and competent ... You were treated fairly ... Staff went the extra mile to make sure you got what you needed ... In the end, you got what you needed.

Subsample: Those who have contacted the NEB

GAP ANALYSIS. As with the evaluation of company performance, the effectiveness with which the NEB is meeting landowners' expectations for service was examined using the gap analysis technique described above.

This analysis reveals a wide range in the performance gap across service aspects. It is relatively small in the case of "getting through to someone without difficulty" (22%), but more than doubles in terms of "providing landowners what they need in the end" (43%) and "staff going the extra mile" (45%). While these data suggest that the NEB may be less effective than pipeline companies in meeting landowners' needs when contacting the Board, the small size of the subsample examined is too small to allow for any definitive conclusion on this question.

Satisfaction with NEB contact – GAP analysis



N=33-45

GAP analysis is calculated as the percentage of landowners who consider this aspect of service to be very important (Q.43a-e) who do not think that the NEB has delivered on it during their most recent contact (i.e., ratings of neutral or disagree)

Caution: These results are based on a small subsample of landowners, and should therefore be interpreted as directional rather than conclusive

Q.36

I would like to ask you more specifically about your most recent experience with the {company/NEB} when you contacted them about this issue or concern. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where "1" means "strongly disagree" and "5" means "strongly agree" ... You were able to get through to someone without difficulty ... The staff you dealt with were knowledgeable and competent ... You were treated fairly ... Staff went the extra mile to make sure you got what you needed ... In the end, you got what you needed.

Subsample: Those who have contacted the NEB

Importance of Service Aspects

Landowners place equally strong importance on a number of service aspects in terms of what they expect when contacting the NEB about an issue or concern.

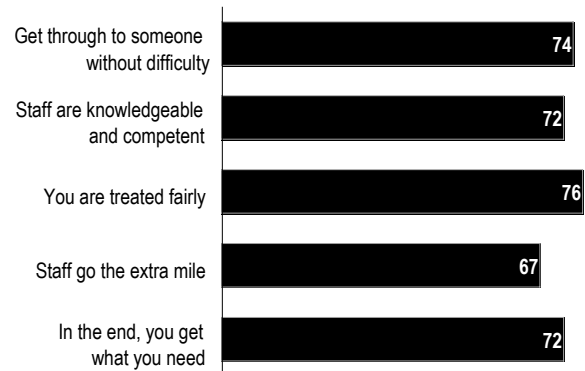
Apart from actual contact experience to date, all landowners interviewed for this survey were asked about the degree of importance they would place on each of the five specific aspects of service when contacting the NEB for any reason (drawn from the CMT). A five-point importance scale was used for these questions, ranging from “1” for “not at all important” to “5” to “very important.”

As might be expected, all five areas are deemed a high priority by landowners in terms of their expectations when contacting the NEB. Three-quarters say it is very important that they get through to someone without difficulty (74%), that staff are knowledgeable and competent (72%), that they are treated fairly (76%) and in the end get what they need (72%). Slightly fewer (67%) place this degree of importance on having staff go the extra mile to address their needs.

Given these high levels of stated importance, there is relatively little variation across regions or other landowner subgroups. Women are more likely than men to emphasize the importance of all five aspects of service.

Important service priorities when contacting the NEB

Very important



Q.43

I'd now like to ask you about what aspects of service are important to you when contacting the NEB about the pipeline on your property or for any other reason. Please tell me how important each of the following are to you, where “1” means “not at all important” and “5” means “very important” ... You are able to get through to someone without difficulty ... The staff you deal with were knowledgeable and competent ... You are treated fairly ... Staff go the extra mile to make sure you get what you need ... In the end, you get what you need.

USE OF NEB WEBSITE

Only two percent of landowners surveyed have made use of the NEB website over the past year.

Very few (2%) of the landowners surveyed report to have visited the NEB website within the past 12 months. In almost all cases, these individuals were light users, visiting the site fewer than 10 times over this period.

Given this small sample of website visitors (N=23), no further analysis of the data collected on use of the NEB website is possible. These issues can best be addressed by doing a separate survey of website visitors.

PARTICIPATION AT NEB EVENTS

Event Participation

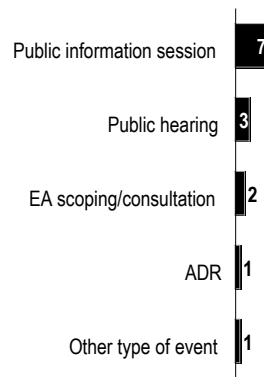
About one in ten landowners have ever attended an NEB-sponsored event, in most cases a public information session or public hearing. Those attending are positive about this experience, particularly as it relates to timing and location.

Relatively few landowners have had any experience with NEB-sponsored events. One in ten of those surveyed report to have ever attended an NEB event at any time, in most cases a public information session (7%) or public hearing (3%). Only a handful of those interviewed report involvement in an environmental assessment scoping or consultation exercise, appropriate dispute resolution (ADR) process or other NEB-sponsored event.

Event participation is most likely to be reported by landowners in New Brunswick/Nova Scotia (mostly public hearings and EA scoping sessions) and in Alberta (public hearings, ADR processes).

Among those attending NEB events, overall satisfaction is reasonably strong. More than half say they are very (25%) or somewhat (26%) satisfied, compared with one in five who are somewhat or very dissatisfied (20%). The small number of landowners answering this question (N=115) is too small to allow for meaningful comparisons across regions or other subgroups.

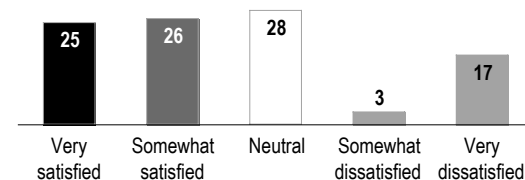
Ever attended an NEB event



Q.48

Have you ever participated in an NEB event, such as a hearing or public information session?

Overall satisfaction with participation in NEB event



N=115

Q.49

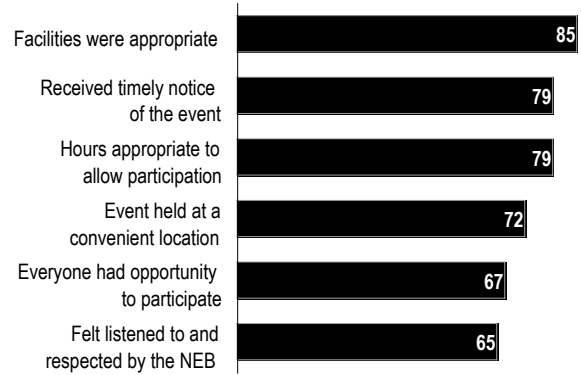
Overall, how satisfied were you with your participation in (this NEB event/most recent NEB event), with "1" meaning "very dissatisfied" and "5" meaning "very satisfied."

Subsample: Those who have ever participated in an NEB event

Satisfaction levels are noticeably stronger with respect to specific aspects of the events sponsored by the NEB. At least eight in ten agree that the event(s) they attended were held at appropriate facilities (85%), provided timely notice in advance (79%) and were held during appropriate hours (79%). Slightly smaller majorities also give the events positive ratings in terms of being held at convenient locations (72%), provided everyone with an opportunity to participate (67%) and made them feel listened to and respected by the NEB (65%).

Satisfaction with specific aspects of NEB event

Agree



N=115

Q.51

Please tell me the extent to which you agree with each of the following statements about your participation in this NEB event, where "1" means "strongly disagree" and "5" means "strongly agree" ... You received notice of the event in a timely manner ... The hours were appropriate to allow you to participate ... The event was held at a convenient location ... The facilities used for the event were appropriate ... Everyone had an opportunity to participate ... You felt you were listened to and respected by the NEB.

Subsample: Those who have ever participated in an NEB event

NEB Hearings

One in four landowners are aware of public hearings in their area over the past five years, but only a handful report attending one. Most choose not to go because they see no need to, or because of personal circumstances such as lack of time.

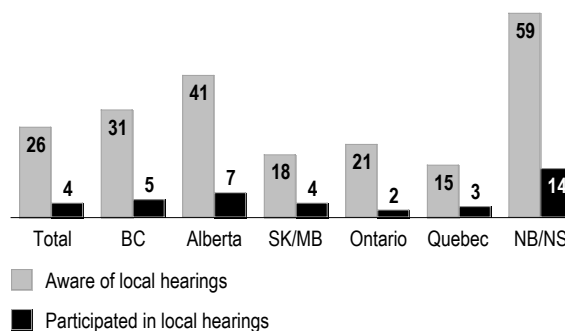
One in four (26%) of the landowners surveyed express awareness of some type of NEB hearing on pipelines being held in their area over the past five years. Such recall ranges from a high of 59 percent in New Brunswick/Nova Scotia, to a low of 15 percent in neighbouring Quebec. Awareness of NEB hearings is also higher among rural residents, and those who say they have a natural gas pipeline flowing across their property.

While a significant minority of landowners may be aware of such hearings, relatively few report to have actually attended when specifically asked (consistent with the results presented in the previous section). Once again, participation levels are highest in New Brunswick/Nova Scotia (14% of all landowners surveyed), while ranging between two and seven percent in other regions of the country. Participation levels do not vary much across urban-rural subgroups, by type of fuel in the local pipeline, or by proximity of dwelling to the pipeline.

Those who were aware of local NEB hearings but did not attend give several reasons for this, but first and foremost because they had no particular issues or concerns about the pipeline proposal under consideration that would prompt their attendance (50%). Others say they did not attend because of personal circumstances prevented it, such as a lack of time or being out of town when the hearing took place (36%). One in six (15%) of this group say they did not attend because it was inconvenient or difficult for them to do so, because it was too far away, or simply too much trouble. A handful cite other reasons, such as the view that one person cannot make a difference or a lack of respect for the process.

NEB hearings in past five years

By region



Q.52

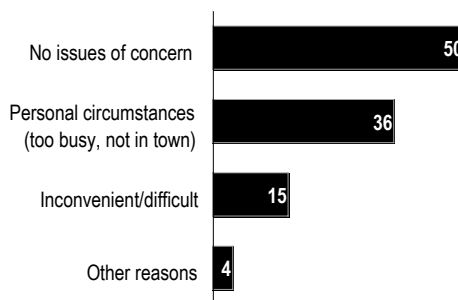
Are you aware of any NEB hearings on pipelines that were held in your area in the past five years?

Q.53

Did you attend this hearing?

Subsample: Those who are aware of any NEB hearings on pipelines that were held in their area in the past five years

Reason for not attending local NEB hearing



N=245

Total exceeds 100 percent because landowners can provide more than one response

Q.54

Can you tell me why you did not attend?

Subsample: Those who are aware of any NEB hearings on pipelines that were held in their area in the past five years, and who did not attend a hearing

SURVEY METHODS

Questionnaire Design

The questions were designed by Environics senior researchers, in conjunction with representatives from the National Energy Board (NEB). Environics incorporated a few questions drawn from the 2001 NEB-commissioned survey, as well as relevant questions from the Common Measurements Tool (CMT).

Once the questionnaire was finalized and approved by the NEB, it was then translated into French using the company's professional translators. A copy of the questionnaire in English is attached as an appendix.

PRE-TEST. Prior to finalizing the survey for field, Environics conducted a full pre-test with "live" respondents. This consisted of telephone interviews in the same manner as the full survey with a handful (15) of landowners drawn from several regions. The interviews were monitored by Environics' senior research team and NEB representatives. Following the pre-test, Environics provided the NEB with a detailed assessment of the pre-test results.

Sample Design

The sampling method was designed to complete interviews with a representative sample of 1,200 Canadian landowners with pipelines running through their property, and was stratified by region.

The sample was drawn from three sources: a) A list of 844 landowners who had participated in a 2002 NEB survey and who agreed at that time to participate in future NEB surveys; b) 6,783 landowners identified by pipeline companies; and c) A small group of 27 landowners who had contacted the NEB directly in the past two years because of a specific issue or concern. In accordance with the Privacy and Access to Information Act, companies contacted all landowners on this second list by letter in advance of the survey, advising them of the study and offering them the opportunity to decline participation (161 did so). The remaining 7,493 formed the sample frame that was used to conduct the survey.

The following companies provided the NEB with lists of landowners for inclusion in this survey: Alliance Pipeline Limit , Champion Pipeline Corporation Limited, ConocoPhillips Canada Limited, Duke Energy Gas Transmission, Energy Fundamentals Group, L.P. Re Centra Transmission Holdings Inc., Enbridge Gas Distribution Inc. (formerly Enbridge Consumers' Gas), Enbridge Pipelines Inc., Enbridge Pipelines (Westspur) Inc., Express Pipeline Limited Partnership, Many Islands Pipe Lines (Canada) Limited, Maritimes & Northeast Pipeline Management Ltd., Minell Pipeline Limited, Montr al Pipe Line Limited, Terasen Pipelines (Trans Mountain) Inc., Trans-Northern Pipelines Inc., Vector Pipeline Limited Partnership, and Wascana Pipe Line Ltd.

The following table outlines the estimated population of landowners in each region, the final weighted and unweighted sample distributions across regions, and the margin of sampling error for each segment. The weighted data reflect the sample distribution by region to ensure the national results are proportionate to the actual distribution of the target population across the country.

Final Sample Distribution by Region

REGION	ESTIMATED LANDOWNER POPULATION	WEIGHTED SAMPLE	UNWEIGHTED SAMPLE	MARGIN OF ERROR
NB/NS	1,172	45	150	(+/- 8.0%)
Quebec	2,047	78	165	(+/- 7.6%)
Ontario	10,760	426	201	(+/- 6.9%)
MB/SK	4,644	179	204	(+/- 6.9%)
Alberta	3,054	123	200	(+/- 6.9%)
BC	6,992	269	201	(+/- 6.9%)
CANADA	28,669	1,121	1,121	(+/- 2.9%)

Note: The margins of sampling error are at the 95% confidence level

The population estimates are based on the numbers of landowners provided by the pipeline companies

Fieldwork

The interviewing was conducted from Environics' central facilities in Toronto and Montreal, March 11 to 25, 2004. Field supervisors were present at all times to ensure accurate interviewing and recording of responses, and 10 percent of each interviewer's work was unobtrusively monitored for quality control, in accordance with the standards set out by the Canadian Association of Marketing Research Organizations (CAMRO). Interviews averaged 19 minutes in length.

Up to eight call-backs were made to reach each household selected in the sample, and such calls were made at different times of the day and days of the week, to maximize the chances of reaching someone at home.

All surveys were conducted in respondents' official language of choice. Respondents were advised of their rights under the Privacy and Access to Information Act (e.g., identifying purpose of research, identifying sponsoring agency and research supplier, the voluntary nature of the survey, and the protection of their responses under the Act), and offered a copy of the final

results once they are published by the NEB. This survey was registered under the Canadian Survey Research Council (CSRC). This registration system permits the public to verify a survey call, inform themselves about the industry and/or register a complaint.

Completion Results

From the total of 7,493 landowner households identified and contacted, interviews were completed with 1,121 during the field period specified above. The margin of error for a sample of this size is plus or minus 2.9 percentage points, in 19 out of 20 samples. The margins are wider for regional and demographic subsamples.

The effective response rate for this survey is 21 percent: the number of completed interviews (1,121) divided by the total dialled sample (7,091) minus the non-eligible households, non-valid/ non-residential numbers, numbers not in service, and households in which respondents spoke neither English nor French (1,788). The actual completion rate is 59 percent: the number of completed interviews (1,121) divided by the number of qualified respondents contacted directly (1,904). The following table presents the final disposition of all numbers dialled.

Completion Results

	#	%
Total Dialled Sample	7,091	100
Households Not eligible/ quota full	777	11
Non Residential/ Not in service	972	14
Language barrier	39	1
Subtotal	1,788	25
New Base (7,091 - 1,788)	5,303	100
No answer/line busy/respondent not available/ callbacks	3,399	64
Refusals	746	14
Mid-interview termination	37	1
Subtotal	4,182	79
Net Completions (5,303 - 4,182)	1,121	21
Completion Rate [1,121/(5,303 - 3,399)]		59

Note: percentages may not sum exactly due to rounding.

Sample Profile

The following table presents a profile of the landowners interviewed for this survey by selected property characteristics.

CHARACTERISTICS	TOTAL (N=1121)	BC (N=201)	AB (N=200)	MB/SK (N=204)	ON (N=201)	QC (N=165)	NS/NB (N=150)
	%	%	%	%	%	%	%
TENURE							
Owner	95	94	95	93	97	97	97
Tenant/ occupant	4	5	4	4	2	3	3
Both	1	1	2	2	-	-	-
LENGTH OF TENURE							
Less than 1 year	-	-	-	1	-	-	-
1 to 5 years	7	13	4	4	5	4	3
6 to 10 years	10	16	8	7	8	11	7
11 to 25 years	26	29	20	14	28	41	22
More than 25 years	56	40	67	73	57	44	68
PROPERTY SIZE							
25 hectares or less	26	35	8	9	31	26	28
25.1 to 50 hectares	17	5	6	1	32	26	29
50.1 to 75 hectares	17	13	32	28	13	5	10
75.1 to 250 hectares	17	8	23	27	14	21	22
Over 250 hectares	13	18	29	31	1	4	3
PROPERTY USAGE*							
Agricultural	79	68	94	97	81	68	30
Residential	55	70	55	35	58	48	38
Woodland or woodlot	33	20	16	7	51	38	91
Business or commercial	12	14	16	14	10	5	14
Recreational	3	3	2	-	4	-	11
Industrial	2	3	1	2	1	4	5
Other	2	2	3	2	-	2	3
DISTANCE FROM PIPELINE							
Within 100 meters	22	36	9	8	22	25	8
100 to 500 meters	26	25	26	18	32	17	14
500 to 1,000 meters	20	15	29	23	19	18	16
More than 1,000 meters	25	13	28	41	20	36	49
COMMUNITY							
Rural area	79	70	85	89	82	49	89
Town or village	13	12	11	10	14	25	8
Large/ medium city	5	12	1	-	2	9	1
Suburban	3	4	2	-	1	16	1

*The totals do not equal 100% due to multiple mentions

Note 1: the results exclude respondents who declined to provide an answer or didn't know

Note 2: percentages may not sum exactly due to rounding

Derived Importance Analysis

One of two approaches can be taken to identify the importance with which landowners (or any type of customer or client) place on specific aspects of service.

STATED IMPORTANCE. The first approach (called “stated importance”) is to ask landowners directly how much importance they place on each of the specific aspects of the information. This approach suffers from two limitations: a) It requires additional questions be placed on the survey; and b) People tend to rate all aspects equally important when asked in this way (an example of this can be found on page 34). A further problem is that at some level respondents may not be truly conscious of the significance various aspects play in determining their overall satisfaction level.

DERIVED IMPORTANCE. The second approach (derived importance) involves a more sophisticated analysis in which the importance that landowners place on the different aspects of company information is identified through their underlying relationship with overall satisfaction. Using multivariate analytic techniques (multiple regression), the specific information aspects are used as “predictors” of overall satisfaction. The stronger the predictive relationship between an aspect and overall satisfaction, the more likely it is that this aspect is in fact an important “driver” of satisfaction. This approach offers clear advantages over stated importance in terms of not requiring additional questions or respondents’ ability to understand and articulate what they consider to be important.

APPENDIX: QUESTIONNAIRE

**National Energy Board
2004 Landowner Survey**

Final Questionnaire

Introduction

Good morning/afternoon/evening. My name is _____ and I am calling from the Environics Research Group, a public opinion research company. Today we are conducting a survey on behalf of the National Energy Board, or NEB, with people like you who own or live on property crossed by an energy pipeline.

Am I speaking with (contact name), (OR) may I please speak to _____?

Do you recall receiving a letter in the mail recently from the National Energy Board or your local pipeline company about this survey?

- 01 - Yes
- 02 - No

The purpose of the survey is to find out landowners' experience with pipelines on their property and to get feedback on any contact they may have had with the NEB or local pipeline company. The survey will take about 15 minutes, and your answers will remain strictly confidential.

IF ASKED: I can give you a contact name at the NEB at the end of the survey [PROVIDE UPFRONT IF RESPONDENT INSISTS

IF RESPONDENT IS NOT PROPERTY OWNER/TENANT, ASK TO SPEAK TO THIS PERSON AND REPEAT INTRODUCTION

IF PERSON SELECTED IS NOT AVAILABLE, ARRANGE FOR CALL-BACK

A. Familiarity with Pipeline on Property

I'd like to begin by asking you a few questions about your property . . .

1. Are you aware that a pipeline runs across or under your property?

01 - Yes SKIP TO Q.3
02 - No
99 - Don't know/No answer

2. (IF NO TO Q.1) The records provided by the NEB or pipeline company indicate that you own or live on a property through which a pipeline runs. Would there be someone else in your household who could confirm this?

01 - Yes IF NEW RESPONDENT, START AT INTRO; IF CONFIRMED, CONTINUE
02 - No THANK AND TERMINATE INTERVIEW
99 - DK/NA THANK AND TERMINATE INTERVIEW

3. Are you currently an owner or tenant of this property?

01 - Owner
02 - Tenant/Occupant
03 - Other (SPECIFY _____)
04 - No longer own or live on property/sold property THANK AND TERMINATE
99 - DK/NA THANK AND TERMINATE

4. May I confirm the province in which this property is located?
READ PROVINCE FROM SAMPLE - CHANGE IF NECESSARY. IF RESPONDENT OWNS PROPERTY WITH PIPELINES IN MORE THAN ONE PROVINCE, ASK FOR PROVINCE OF PRINCIPAL RESIDENCE

01 - Alberta
02 - British Columbia
03 - Manitoba
04 - New Brunswick
05 - Nova Scotia
06 - Ontario
07 - Quebec
08 - Saskatchewan
99 - DK/NA

5. Can you tell me how close the pipeline is to your dwelling or place of work? Is it:
READ CATEGORIES

01 - Within 100 metres (300 feet)
02 - 100 to 500 metres (300 to 1,500 feet)
03 - 500 to 1,000 metres (1,500 to 3,000 feet)
04 - More than 1,000 metres (greater than 3,300 feet)
VOLUNTEERED
05 - Do not live/work on property
99 - DK/NA

6. Can you tell me which company operates the pipeline that crosses your property?
DO NOT READ - USE SEPARATE LIST FOR APPLICABLE PROVINCE - CODE MORE THAN ONE IF VOLUNTEERED

Alberta

- 01 - Alliance Pipeline
- 02 - Enbridge Pipelines
- 03 - Express Pipeline Ltd.Partnership
- 04 - Terasen Pipelines/Trans Mountain
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

British Columbia

- 01 - Alliance Pipeline
- 06 - Duke Energy/Westcoast Pipeline
- 05 - Terasen Pipelines/Trans Mountain
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

Manitoba/Saskatchewan

- 01 - Alliance Pipeline
- 07 - Centra Transmission Holdings
- 03 - Conoco Phillips Canada
- 02 - Enbridge Pipelines
- 08 - Enbridge Pipelines-Westspur
- 09 - Many Islands Pipe Lines
- 10 - Minell Pipeline
- 11 - Souris Valley Pipelines
- 12 - TransCanada Pipelines
- 13 - Wascana Pipe Line/Plains Marketing Canada
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

Ontario

- 07 - Centra Transmission Holdings
- 14 - Enbridge Gas Distribution
- 02 - Enbridge Pipelines
- 12 - TransCanada Pipelines
- 15 - Trans Northern Pipelines
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

Quebec

- 17 - Champion Pipeline Corporation
- 02 - Enbridge Pipelines
- 18 - Gazoduc Trans Quebec & Maritimes Inc.
- 19 - Montreal Pipe Line
- 15 - Trans Northern Pipelines
- 12 - TransCanada Pipelines
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

- 20 - Maritimes & Northeast Pipeline Management
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

7. Could you tell me what type of product or fuel flows through the pipeline that crosses your land?
DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

01 - Natural gas
02 - Oil
03 - Propane
04 - Sour gas
05 - Gasoline
06 - Jet fuel
07 - Carbon Dioxide
08 - Butane
98 - Other: (SPECIFY _____)
99 - DK/NA

B. Pipeline Safety

Now I'd like to ask you about safety aspects of pipelines . . .

8. To the best of your knowledge, does the pipeline company check the safety of the pipeline on your property?

01 - Yes, company checks for safety
02 - No, company does not check for safety
99 - Cannot say/DK/NA

9. Are you familiar with the requirements that have to be followed when excavating near a pipeline?

01 - Yes SKIP TO Q.11
02 - No
99 - DK/NA

10. (IF NO/DK/NA in Q.9) Would you like to receive a copy of these requirements?

01 - Yes REQUEST NAME AND ADDRESS AT END OF SURVEY
02 - No
99 - DK/NA

11. Who would you call if you had concerns about the pipeline on your property?
DO NOT READ - CODE ALL THAT APPLY

01 - Pipeline company
02 - NEB
03 - local police/RCMP
04 - One-call Centre
05 - friends/neighbors/family
98 - Other (SPECIFY _____)
97 - Do not know/Never considered
99 - DK/NA

15. How does the company typically contact you?
READ CATEGORIES ONLY IF NECESSARY - CODE ALL THAT APPLY

01 - By mail - non-specific
02 - By e-mail
03 - In-person visits
04 - By telephone
05 - Open houses/events
06 - Receive Annual Calendar in mail
07 - Other (SPECIFY _____)
VOLUNTEERED
99 - DK/NA

16. In the past two years, has the company contacted you for any of the following reasons related to the pipeline on your property?
READ IN SEQUENCE

- a. Safety or emergency programs
- b. Construction or new developments
- c. Property rights or easements
- d. Accessibility issues, such as crossing over the pipeline with a vehicle
- e. Encroachments, such as buildings near the pipelines
- f. For any other reason (SPECIFY _____)

01 - Yes
02 - No SKIP TO Q.19
99 - DK/NA SKIP TO Q.19

17. Overall, how satisfied were you with your most recent contact from the pipeline company? Please rate your experience, with "1" being "Very dissatisfied" and "5" being "Very satisfied."

01 - Very dissatisfied
02 -
03 - SKIP TO Q.19
04 SKIP TO Q.19
05 - Very satisfied SKIP TO Q.19
VOLUNTEERED
99 - DK/NA SKIP TO Q.19

18. (IF DISSATISFIED (01-02) IN Q.17) What would you say is the main reason you were dissatisfied with this most recent contact with the company?
DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

01 - Took too long to get what I needed
02 - Staff not responsive
03 - Could not get answers to questions
04 - Too much bureaucracy
05 - Hard to reach
06 - Did not take issue/problem seriously
07 - Still waiting for a response/resolution
98 - Other (SPECIFY _____)
99 - DK/NA

19. I would like to know how satisfied you were with the information provided by the pipeline company over the past two years. Please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree."
READ IN SEQUENCE

- a) The information was easy to understand (CMT - not core)
- b) The information you received was up-to-date (CMT - not core)
- c) You received accurate information (CMT - not core)
- d) You got the information you needed (CMT - not core)

01 - Strongly disagree
02 -
03 -
04 -
05 - Strongly agree
VOLUNTEERED
97 - Not applicable (e.g. did not request information)
99 - DK/NA

20. Overall, would you say the company has exceeded, met, nearly met, or missed your requirements for information as it pertains to the pipeline on your property?

01 - Exceeded your requirements SKIP TO Q.22
02 - Met your requirements SKIP TO Q.22
03 - Nearly met your requirements
04 - Missed your requirements
VOLUNTEERED
99 - DK/NA SKIP TO Q.22

21. (IF NEARLY MET/MISSED IN Q.20) In what way has the company not fully met your requirements for such information?
SPECIFY

99 - DK/NA

22. Has the pipeline company provided you with any publications prepared by the National Energy Board?
DO NOT READ - CODE ONE ONLY

01 - Yes
02 - No, but I received them directly from the NEB
03 - No. SKIP TO Q. 27
99 - DK/NA SKIP TO Q. 27

23. (IF 01 or 02 in Q.22) Which of the following topics are covered in the NEB publications you have received?

READ IN SEQUENCE - CODE ALL THAT APPLY

- 01 - Living and working safety around pipelines
- 02 - How to contact the NEB
- 03 - Pipeline crossing regulations
- 04 - NEB Hearings
- 05 - Any other type (SPECIFY _____)
- VOLUNTEERED
- 99 - DK/NA

IF NO NEB PUBLICATIONS RECEIVED IN Q.23 OR 24- SKIP TO Q.27

25. Overall, how satisfied were you with the information you received from the NEB? Please rate this information, with "1" being 'Very dissatisfied' and "5" being "Very satisfied."

- 01 - Very dissatisfied
- 02 -
- 03 -
- 04 -
- 05 - Very satisfied
- VOLUNTEERED
- 99 - DK/NA

26. Thinking more specifically about the NEB information you have received, please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree"

READ IN SEQUENCE

- a) The information was easy to understand (CMT - not core)
- b) The information you received was up-to-date (CMT - not core)
- c) You received consistent information (CMT - not core)
- d) You received accurate information (CMT - not core)
- e) You got the information you needed (CMT - not core)
- 01 - Strongly disagree
- 02 -
- 03 -
- 04 -
- 05 - Strongly agree
- VOLUNTEERED
- 99 - DK/NA

27. Had you heard of the National Energy Board, prior to this survey?

- 01 - Yes
- 02 - No
- 99 - DK/NA

33. In which of the following ways did you communicate with the [company/NEB] as a result of contacting them about this problem or concern? Was this through:
READ CATEGORIES - CODE ALL THAT APPLY

01 - Telephone conversations
02 - Written correspondence
03 - E-mail correspondence
04 - An inspection of your property
05 - As part of an Assisted dispute resolution process, or
98 - In any other way (SPECIFY _____)
VOLUNTEERED
99 - DK/NA

34. How satisfied were you with your most recent communication with the [company/NEB] about this problem or concern in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."

- a. How satisfied were you with the amount of time it took to make successful contact with the [company/NEB] on this occasion? [CMT Core]
- b. How satisfied were you with the accessibility of the [company/NEB]? [CMT Core]
- c. How satisfied were you with the overall way in which you were treated by the [company/NEB] on this occasion? [CMT Core]

01 - Very dissatisfied
02 -
03 -
04 -
05 - Very satisfied
VOLUNTEERED
99 - DK/NA

35. (IF DISSATISFIED IN Q.34c) What would you say is the main reason you were dissatisfied with the way you were treated by the [company/NEB]?
DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

01 - Took too long to get what I needed
02 - Staff not responsive
03 - Could not get answers to questions
04 - Too much bureaucracy
05 - Hard to reach
06 - Did not take issue/problem seriously
07 - Still waiting for a response/resolution
98 - Other (SPECIFY _____)
99 - DK/NA

36. I would like to ask you more specifically about your most recent experience with the [company/NEB] when you contacted them about this issue or concern. Thinking about when you contacted them, please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree"
READ IN SEQUENCE

- a. You were able to get through to someone without difficulty [CMT Core]
- b. The staff you dealt with were knowledgeable and competent [CMT Core]
- c. You were treated fairly [CMT Core]
- d. Staff went the extra mile to make sure you got what you needed (CMT core)
- e. In the end, you got what you needed (CMT core)

01 - Strongly disagree
02 -
03
04
05 - Strongly agree
VOLUNTEERED
99 - DK/NA

E. Contact with the NEB

37. Have you ever contacted or dealt directly with the NEB for reasons other than what you just previously mentioned?

01 - Yes
02 - No SKIP TO Q.43
99 - DK/NA SKIP TO Q.43

38. For what (other) purpose(s) have you contacted the NEB? IF "OTHER" in Q.30, ASK: For what purpose have you contacted the NEB?
DO NOT READ - CODE ALL THAT APPLY

01 - Hearing
02 - Emergency program
03 - Maintenance
04 - To get information
05 - Awareness program
07 - Response to accident
08 - Crossing violation/Crossing pipeline with vehicle
09 - To make complaint/express problem
10 - Encroachment
98 - Other (SPECIFY _____)
99 - DK/NA

39. How did you contact the NEB on this most recent occasion?
DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

- 01 - Telephone
- 02 - By letter/fax
- 03 - E-mail
- 04 - Website
- 05 - In-person
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

40. How satisfied were you with this most recent communication with the NEB in terms of the following, with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."

- a. How satisfied were you with the amount of time it took to make successful contact with the NEB on this occasion? [CMT Core]
- b. How satisfied were you with the accessibility of the NEB? [CMT Core]
- c. How satisfied were you with the overall way in which you were treated by the NEB on this occasion? [CMT Core]

- 01 - Very dissatisfied
- 02 -
- 03 -
- 04 -
- 05 - Very satisfied
- VOLUNTEERED
- 99 - DK/NA

41. (IF DISSATISFIED IN Q.40c) What would you say is the main reason you were dissatisfied with this recent contact with the NEB?
DO NOT READ - CODE MORE THAN ONE IF VOLUNTEERED

- 01 - Took too long to get what I needed
- 02 - Staff not responsive
- 03 - Could not get answers to questions
- 04 - Too much bureaucracy
- 05 - Hard to reach
- 06 - Did not take issue/problem seriously
- 07 - Still waiting for a response/resolution
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

42. Thinking now about this recent contact with the NEB, please tell me the extent to which you agree with each of the following statements, where "1" means "Strongly disagree" and "5" means "Strongly agree"

READ IN SEQUENCE

- a. You were able to get through to someone without difficulty [CMT Core]
- b. The staff you dealt with were knowledgeable and competent [CMT Core]
- c. You were treated fairly [CMT Core]
- d. Staff went the extra mile to make sure you got what you needed (CMT core)
- e. In the end, you got what you needed (CMT core)

01 - Strongly disagree

02 -

03

04

05 - Strongly agree

VOLUNTEERED

99 - DK/NA

43. I'd now like to ask you about what aspects of service are important to you when contacting the NEB about the pipeline on your property or for any other reason. Please tell me how important each of the following are to you, where "1" means "not at all important" and "5" means "very important."

READ IN SEQUENCE - IF SAY THEY NEVER CONTACT THE NEB, ASK IN TERMS OF WHAT WOULD BE IMPORTANT IF THEY EVER HAD TO

- a. You are able to get through to someone without difficulty [CMT Core]
- b. The staff you deal with were knowledgeable and competent [CMT Core]
- c. You are treated fairly [CMT Core]
- d. Staff go the extra mile to make sure you get what you need (CMT core)
- e. In the end, you get what you need (CMT core)

01 - Not at all important

02 -

03

04

05 - Very important

VOLUNTEERED

99 - DK/NA

F. NEB Contact and Communications

And now a few questions about the NEB website . . .

44. How many times have you visited the NEB website in the past 12 months?
DO NOT READ

01 – None SKIP TO Q. 48
02 – 1-9
03 – 10 – 19
04 – 20 - 29
05 – more than 30 times
99 - DK/NA

45. Overall, how satisfied were you with your most recent visit(s) to the NEB website, with “1” meaning “Very dissatisfied” and “5” meaning “Very satisfied.”

01 - Very dissatisfied
02 -
03 - SKIP TO Q.47
04 - SKIP TO Q.47
05 - Very satisfied SKIP TO Q.47
VOLUNTEERED
99 - DK/NA SKIP TO Q.47

46. (IF DISSATISFIED IN Q.45) In what way were you dissatisfied with the NEB website?
DO NOT READ - CODE ALL THAT APPLY

01 - Too hard to find what I need
02 - Not up to date
03 - Difficult to navigate
04 - Too slow
05 - Poorly designed
06 - Information not current
07 -Does not have information I want/need
08 - Search engines do not work well
98 - Other (SPECIFY _____)
99 - DK/NA

47. Please tell me the extent to which you agree with each of the following statements about your experience with the NEB website, where "1" means "Strongly disagree" and "5" means "Strongly agree:"

READ IN SEQUENCE

- a. It was easy to find the NEB's website (CMT - not core)
- b. When you got to the site, it was easy to find what you were looking for (CMT Core)
- c. The site is visually appealing (CMT – Core)
- d. The site has the information you need (CMT – Core)
- e You feel confident that your privacy is fully protected on this site (CMT Core)
- f. In the end, you got what you needed (CMT core)

- 01 - Strongly disagree
- 02 -
- 03
- 04
- 05 - Strongly agree
- VOLUNTEERED
- 98 - Not applicable
- 99 - DK/NA

48. Have you ever participated in an NEB event, such as a hearing or public information session?
IF YES, PROBE FOR TYPE OF EVENT - CODE ALL THAT APPLY

- 01 - Hearing
- 02 - Public Information Session
- 02 - Public Consultation/Environmental Assessment (scoping)
- 03 - Technical Conference
- 04 - Appropriate Dispute Resolution
- 98 - Other (SPECIFY _____)
- 97 - None SKIP TO Q. 52
- 99 - DK/NA SKIP TO Q. 52

49. (IF YES TO ANY IN Q.48) Overall, how satisfied were you with your participation in [this NEB event/most recent NEB event], with "1" meaning "Very dissatisfied" and "5" meaning "Very satisfied."

- 01 - Very dissatisfied
- 02 -
- 03 - SKIP TO Q.51
- 04 - SKIP TO Q.51
- 05 - Very satisfied SKIP TO Q.51
- VOLUNTEERED
- 99 - DK/NA SKIP TO Q.51

50. (IF DISSATISFIED IN Q.49) In what way were you dissatisfied with your participation in this event?
DO NOT READ - CODE ALL THAT APPLY

- 01 - Bad location/not convenient
- 02 - Location/Facility not appropriate
- 03 - Lack of advance notice
- 04 - Lack of opportunity to be heard
- 05 - Lack of information/Not informative
- 06 - Staff not friendly/responsive
- 07 - Did not last long enough
- 98 - Other (SPECIFY _____)
- 99 - DK/NA

51. Please tell me the extent to which you agree with each of the following statements about your participation in this NEB event, where "1" means "Strongly disagree" and "5" means "Strongly agree:"

READ IN SEQUENCE

- a. You received notice of the event in a timely manner
- b. The hours were appropriate to allow you to participate
- c. The event was held at a convenient location
- d. The facilities used for the event were appropriate
- e. Everyone had an opportunity to participate
- f. You felt you were listened to and respected by the NEB

- 01 - strongly disagree
- 02
- 03
- 04
- 05 - strongly agree
- VOLUNTEERED
- 98 - Not applicable
- 99 - DK/NA

52. Are you aware of any NEB Hearings on pipelines that were held in your area in the past five years?

- 01 - Yes
- 02 - No SKIP TO Q. 55
- 99 - DK/NA SKIP TO Q. 55

53. (IF YES TO Q.) Did you attend this hearing?

- 01 - Yes SKIP TO Q. 55
- 02 - No
- 99 - DK/NA SKIP TO Q.55

54. (IF NO TO Q.53) Can you tell me why you did not attend?
DO NOT READ - CODE ALL THAT APPLY

01 - No issues of concern/Satisfied with proposal/company information
02 - Did not affect my property
03 - Too much hassle/trouble
04 - No time/Too busy
05 - Not available/Out of town
06 - Cost/Too expensive
07 - Too far away
08 - Application will be approved anyway
09 - One person can't make a difference
10 - Personal reasons (too old, poor health)
98 - Other (SPECIFY _____)
99 - DK/NA

G. Property/Landowner Profile

Now to finish up, a few questions about your property . . .

55. What is the approximate size of your property?
RECORD IN EITHER HECTARES OR ACRES, DEPENDING ON RESPONDENT'S ANSWER
IF MORE THAN ONE PROPERTY WITH PIPELINE, ASK ABOUT LARGEST PROPERTY AND
THIS PROPERTY WOULD APPLY FOR SUBSEQUENT QUESTIONS

_____ Hectares

or

_____ Acres

97 - REFUSE
99 - DK/NA

56. How long have you or your family owned this property?
READ CATEGORIES IF NECESSARY

01 - Less than one year (2004)
02 - 1 to 5 years (1999-2003)
03 - 6 to 10 years (1994 - 1998)
04 - 11 to 25 years (1980 - 1993)
05 - More than 25 years (prior to 1980)
VOLUNTEERED
97 - REFUSE
99 - DK/NA

57. Which of the following best describes how your property is currently used? [Compas/5]
READ - CODE ALL THAT APPLY

01 - Residential
02 - Agricultural
03 - Woodlands or woodlot
04 - Industrial
05- Business or commercial
VOLUNTEERED
98 - Other (SPECIFY _____)
97 - REFUSE
99 - DK/NA

58. And which of the following best describes the area in which your property is located? Is it:

[Compas/1]

READ - CODE ONE ONLY

01 - A large or medium sized city

02 - A suburban area

03 - A town or village

04 - A rural area

VOLUNTEERED

98 - Other (SPECIFY _____)

99 - DK/NA

59. Before we finish, do you have any final comments or suggestions that you would like to add about any of the topics we've just covered?

SPECIFY

99 - None/DK/NA

This completes the survey. Before I go, I would like to mention that the NEB is interested in maintaining a dialogue with landowners such as yourself, and they would like to know if you will be willing to consider participation in this type of survey in the future? Would you be willing to have us provide your name and contact information to the NEB for this purpose?

01 - Yes

CONFIRM NAME AND ADDRESS BELOW

02 - No

RECORD PHONE NUMBER IN "DO NOT CALL" LIST FOR CLIENT

IF HESITANT OR ASKS:

- You are free to accept or refuse
- Your name and contact information will be used only for research purposes by the NEB
- The NEB would contact you no more than once or twice a year
- As with this survey, your name will not be cross-referenced with any answers to questions you provide
- Your decision to participate or not will in no way affect your current or future dealings with the NEB.

IF YES, May I confirm the following information?

Name _____

Telephone Number: _____

Mailing Address: Street _____

Town, Province _____

Postal code _____

On behalf of the NEB, thank you very much for your time and cooperation. The NEB will be happy to provide you with a summary of the results of this survey in the next couple of months or you can find this on their website at www.neb-one.gc.ca. Would you like to receive a copy in the mail?

01 - Yes

RECORD NAME/ADDRESS IF NOT ALREADY RECORDED ABOVE

02 - No

IF ASKS FOR NEB CONTACT: You can contact Charlene Gaudet at the NEB at 1-800-899-1265.

In case my supervisor would like to verify that I conducted this interview,
may I have your first name?

First Name: _____

RECORD BY OBSERVATION

60. Gender

- 01 - Male
- 02 - Female

61. REGION

- 01 - B.C.
- 02 - Alberta
- 03 - Saskatchewan/Manitoba
- 04 - Ontario
- 05 - Quebec
- 06 - Maritimes

62. Language of interview

- 01 English
- 02 French