

# Energy Safety Canada

## Market Penetration Survey – Final Report

June 30<sup>th</sup>, 2025



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# Background, Objectives, & Methodology

## Background & Objectives

WorkSafeBC funds 13 Health and Safety Associations (HSA) in the province, each covering a different industry sector. It is therefore important for WorkSafeBC to measure the performance of HSAs to ensure the funding it provides is achieving its target outcomes.

The Market Penetration Survey was first fielded in 2016, and the 2025 survey is the fourth survey wave and included 11 HSAs. The objectives of the survey fulfill the requirements of the Funding Framework for Health and Safety Associations (HSAs). The survey was designed to meet the requirements of the service evaluation by:

- Exploring employer perceptions of health and safety
- Measuring employer awareness of their HSAs
- Assessing employer satisfaction with the HSA services they have used
- Identifying employer needs and preferences for health and safety support

## Methodology

The survey was conducted online, and among members of Energy Safety Canada (formerly ENFORM). This report covers the findings of the 2025 iteration of this survey. Below is information on the survey sample and fielding:

Survey wave	Fielding dates	Total responses	Overall response rate	Overall invites	Margin of Error 19 times out of 20
2025	March 3 – April 4	173	11.3%	1535	±7.7%

**Important Note:** At points in this report, we report on data with small sample sizes (<100n). Where this is the case, findings should be interpreted with caution and considered directional in nature.

Data has been weighted by company payroll size<sup>1</sup> to match the actual employer composition for the sector.

<sup>1</sup>**Very Small:** employers with a calculated 2025 assessable payroll amount less than \$150K, and a base WorkSafeBC assessment rate less than \$3K.

**Small:** employers with a calculated 2025 assessable payroll amount greater than or equal to \$150K, but less than \$600K, and/or a base WorkSafeBC assessment rate greater than or equal to \$3K, but less than \$12K.

**Medium:** employers with a calculated 2025 assessable payroll amount greater than or equal to \$600K, but less than \$1.6 million, and a base WorkSafeBC assessment rate greater than or equal to \$12K, but less than \$40K.

**Large:** employers with a calculated 2025 assessable payroll amount greater than or equal to \$1.6 million, and a base WorkSafeBC assessment rate greater than or equal to \$40K.

Key Findings

# Key Findings

## Awareness of ESC

**Virtually all employers (96%) are aware of ESC.**

**Mandatory certifications and other training courses are the top driver of awareness.**

This survey likely under-captures their importance, as these options were not included in the list of sources to choose from. Word of mouth also plays an important role in building awareness of ESC.

## Satisfaction & Usage of ESC

**Most (75%) of employers who know about ESC are satisfied** with what it does to promote health and safety in oil and gas. Most of the rest feel neutral (17%). Very few are actively dissatisfied.

The majority (87%) of oil and gas employers have accessed ESC services, resources or information, and **those who make use of them are usually satisfied**. Online training and certifications are the most widely used.

## Employer Suggestions for ESC

When asked how ESC could better support their company to improve workplace health and safety, employers suggest the HSA focus on providing **more training**, and more **accessible training**.

Employers believe ESC's **online training**, would be the most beneficial in improving workplace health and safety. While less popular, they also indicate ESC's updates and notifications, certifications and health and safety resources would be helpful. They generally prefer getting information via emails from ESC (personalized or group format), and on the ESC website.

## Perceptions of Workplace H&S

Employers in oil and gas generally think workplace safety is **improving** (76%) or **staying the same** (19%). Only 2% think that it is getting worse. When asked to name the main health and safety risks in oil and gas, they tend to think of **both physical and human-factor** risks. The most common concerns include driving, accidents and poor road conditions, as well as a lack of knowledge, training or experience and chemical, toxin or gas exposure.

## Perceptions of Psychological Safety

**Most employers report having a psychologically healthy, safe and inclusive workplace.** However, attitudes towards mental health in oil and gas are more pessimistic, **with about half believing it is taken seriously**.

Just two-in-five (40%) think ESC does a good job supporting workers' mental health, reflecting the fact that most are simply unsure (19%) or have no opinion (33%).

## Barriers to Improving Psychological Safety

Employers say that people's **reluctance to talk about their mental health** is the main obstacle to improving mental health in the workplace. They also point to insufficient information, training or resources and a lack of awareness / knowledge about mental health.

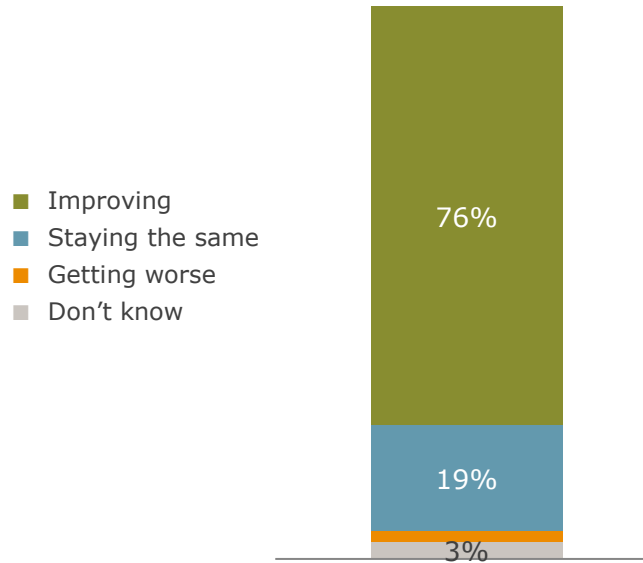
When asked what support and resources would help their organization with workplace mental health, employers call for more resources / information and training / education.

Detailed Findings

# Three-in-four employers in the oil and gas industry think workplace safety is improving.

Most of the remaining think it is staying the same, and only 2% think it is getting worse.

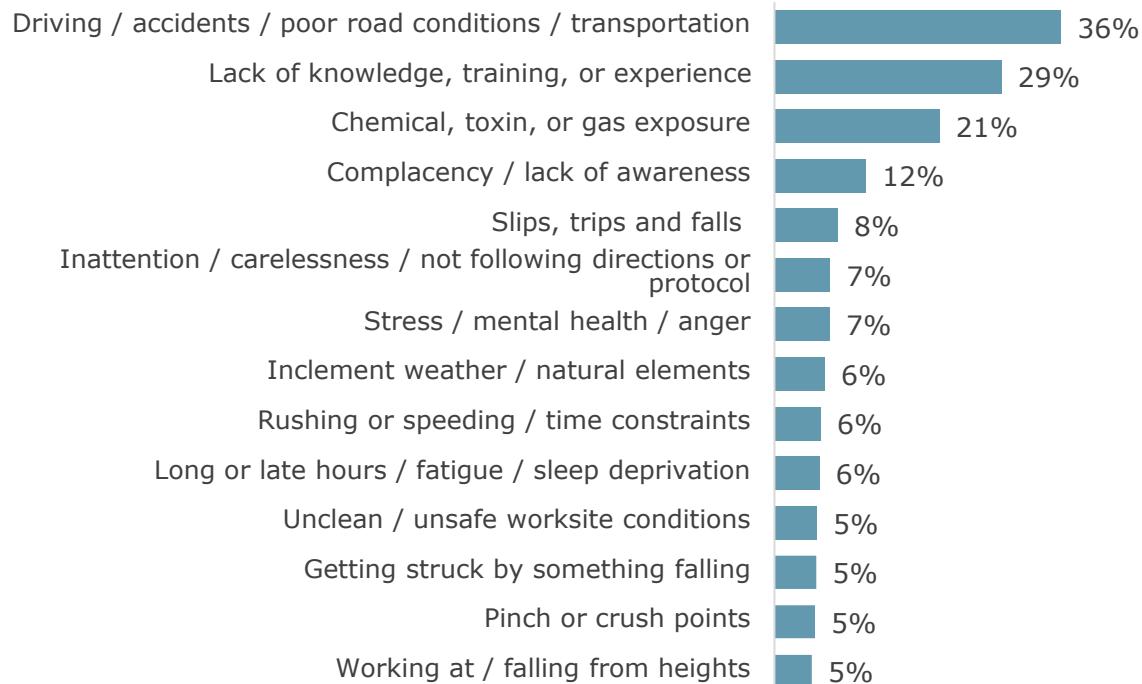
## Perceptions of Workplace Health & Safety



# Oil and gas employers often mention both physical and human factor risks as key health and safety risks.

Driving, accidents and poor road conditions are the most frequently mentioned risks, followed by lack of knowledge, training or experience and chemical, toxin or gas exposure.

## Employer Health & Safety Concerns



Sample: Total 2025 (173)

Note: Only concerns mentioned by 5% or more are shown.

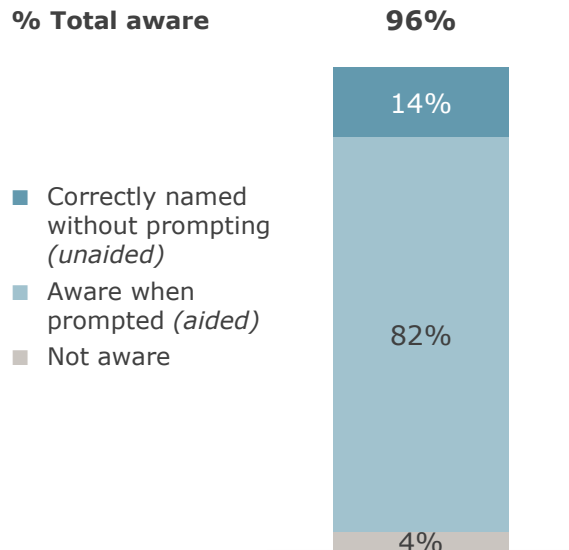
Q10. In every industry there is some degree of health and safety risk to workers. What do you think are the main health and safety risks in your industry? Please list up to three.



Almost all employers in the oil and gas industry are aware of Energy Safety Canada, with the key source of awareness being mandatory certifications or training.

### Awareness of Energy Safety Canada

Sample: Total 2025 (173)



### Source of Awareness:

How employers first learn about Energy Safety Canada

Sample: Those aware of Energy Safety Canada (166)



<sup>1</sup>Note: Only mentions of 2% or more are shown. Not showing mentions of 'Other' (5%).

\*The 30% is likely an underestimate, as it was taken from "other, specify" responses and may be higher in reality.

Q2. Can you think of any organizations in BC that support or promote workplace health and safety in oil and gas? Please list up to three. / Q3. Have you heard of Energy Safety Canada (formerly ENFORM)? / Q3b. How did you first hear about Energy Safety Canada (formerly ENFORM)? / Q3c. What kind of advertising first made you aware?

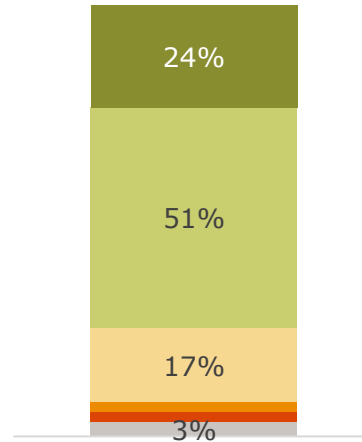
Three-in-four employers who are aware of Energy Safety Canada are satisfied with its efforts to promote health and safety in the industry.

### Satisfaction with Energy Safety Canada's Health & Safety Initiatives

% Very satisfied / Satisfied

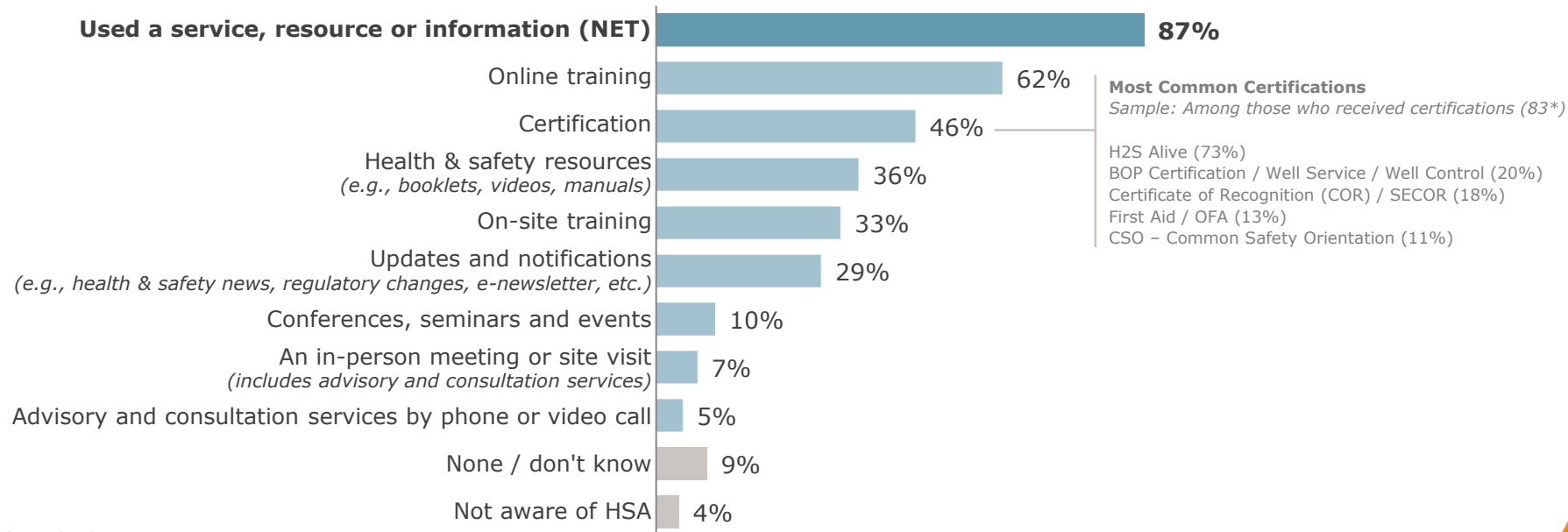
75%

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied
- Don't know



Nearly nine-in-ten employers have accessed services, resources or information from Energy Safety Canada. Online training and certifications are the most widely used.

### Access and Usage of Health & Safety Resources



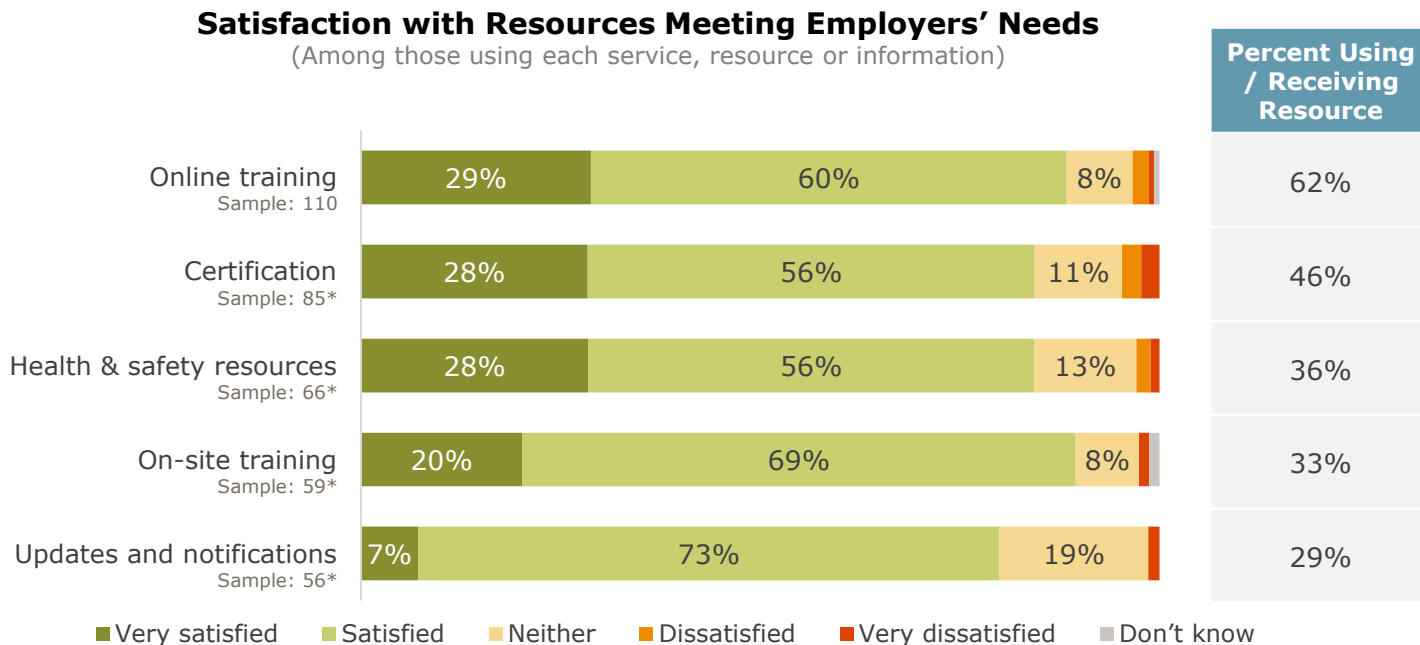
Sample: Total 2025 (173)

Note: Only mentions of 2% or more are shown.

\*Small base size, interpret with caution

Q5. Energy Safety Canada (formerly ENFORM) offers various services, resources, and information on health and safety. Which of these services, resources, or information has your organization used or received from Energy Safety Canada (formerly ENFORM)? Please check all that apply. / q5a\_e. Which certification(s)?

Energy Safety Canada's resources are well rated by those who use them, although the proportion accessing each resource varies.



\*Small base size, interpret with caution

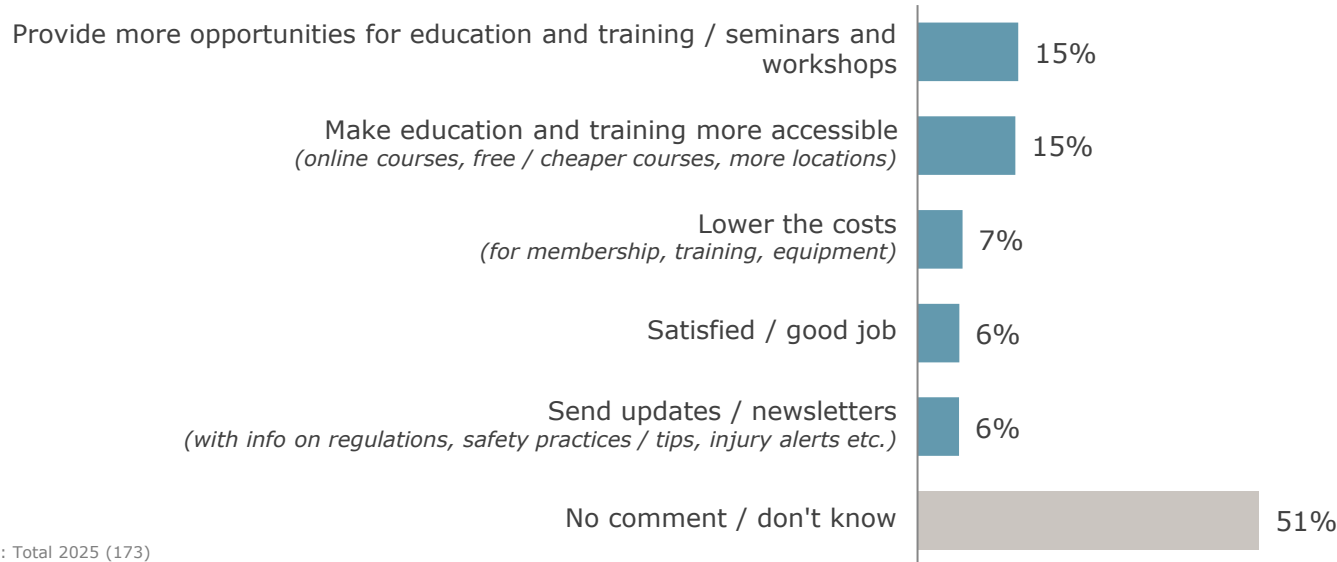
Note: Only services/resources with 30+ responses are shown.

Q5. Which of these services, resources, or information has your organization used or received from Energy Safety Canada (formerly ENFORM)? / Q6a-f. How would you rate [RESOURCE] on meeting your needs?

To better support them in improving health and safety at work, employers suggest ESC could provide more opportunities for education and training and focus on ensuring they are accessible.

### How Energy Safety Canada Could Better Serve or Support Employers to Improve their Workplace Health & Safety

(unaided comments)



**49%** of employers offered a comment

Sample: Total 2025 (173)

Note: Only mentions of 5% or more are shown.

Q7. In what ways could Energy Safety Canada (formerly ENFORM) better serve or support your company and industry to improve health and safety in your workplace? / Energy Safety Canada (formerly ENFORM) is the health and safety association for oil & gas in BC. With this in mind, in what ways could Energy Safety Canada (formerly ENFORM) serve or support your company and industry to improve health and safety in your workplace? Please provide up to three suggestions.

## Examples of Employer Comments on How Energy Safety Canada Could Better Serve or Support Employers



### PROVIDE MORE OPPORTUNITIES FOR EDUCATION AND TRAINING

(15% mentioning)

*"A seminar on how to motivate safety in a positive way."*

*"Possibly more tabletop exercises or workplace skills. The minimum amount required at a gas plant only includes those on shift. For example, one man down drill per year is not enough."*

*"Industry Forums and Workshops: Organizing forums and workshops to facilitate knowledge sharing and collaboration between industry experts and Dimensional Energy."*

*"I think for 'new' workplace employees, there should be more hands-on leadership and focus on leadership."*



### MAKE EDUCATION AND TRAINING MORE ACCESSIBLE

(15% mentioning)

*"[...] Offering more flexible training options, especially for smaller teams or those working on tight schedules. It would also be helpful to see more digital tools or mobile friendly resources that crews can use out in the field."*

*"Keep improving the online training, some stuff might [not] be the best to be taught online but if it's being allowed then the material should at least be vigorous, especially for new trainees that aren't just renewing."*

*"Set up satellite locations during peak seasons to allow for courses to be completed in more remote areas."*



### LOWER THE COSTS

(7% mentioning)

*"Their yearly conference is excellent however the cost is extremely high. My company does not go as they cannot afford it."*

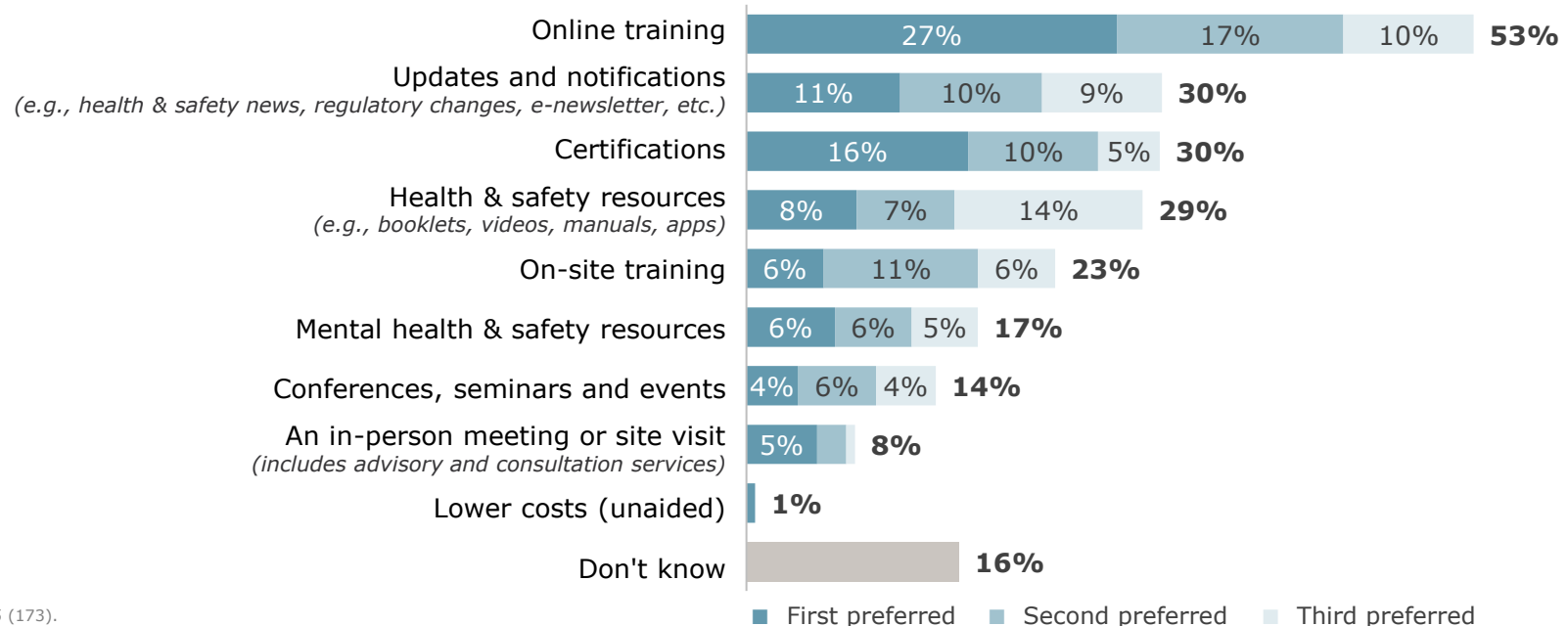
*"Implement longer certification validation periods. Workers requiring multiple training courses must spend too much money and time off work."*

*"Common Safety Orientation was supposed to replace operator orientations and be a free course, however it became a money grab for ESC, and did not replace operator orientations."*

Employers say that ESC online training would most help them to enhance workplace safety in the future. They also indicate updates / notifications, certifications and health and safety resources would be useful.

### Demand for Services, Resources or Information to Help Improve Workplace Health & Safety

(% selecting from aided list)



Sample: Total 2025 (173).

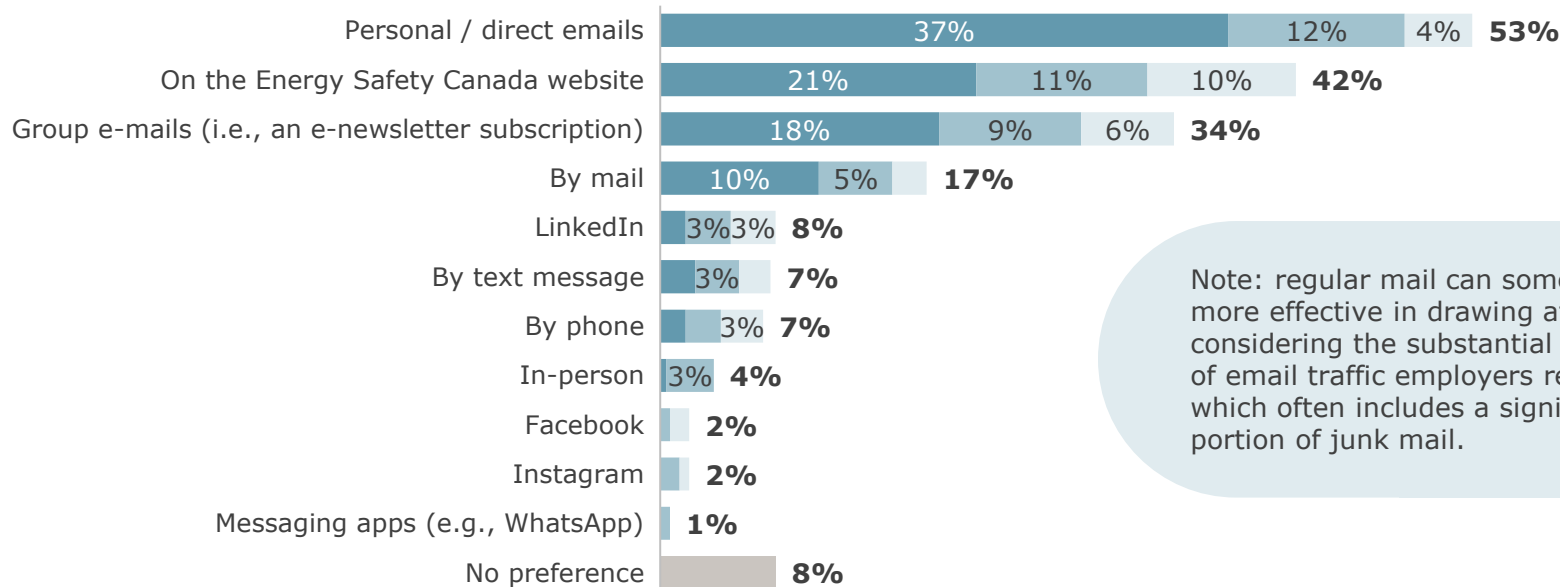
Note: Mentions of <1% are not shown.

Q8. Looking ahead, what kinds of services, resources, or information from Energy Safety Canada (formerly ENFORM) would most help you improve health and safety in your workplace? Please select up to three in preference order, with your top choice first.

Employers generally prefer to receive information via emails from ESC, either personalized or in group format. They also want to be able to access information via ESC's website.

### Employer Communication Preferences

(% ranking top 3)



Note: regular mail can sometimes be more effective in drawing attention, considering the substantial amount of email traffic employers receive, which often includes a significant portion of junk mail.

■ First preferred ■ Second preferred ■ Third preferred

Sample: Total 2025 (173)

Note: Mentions of <1% are not shown.

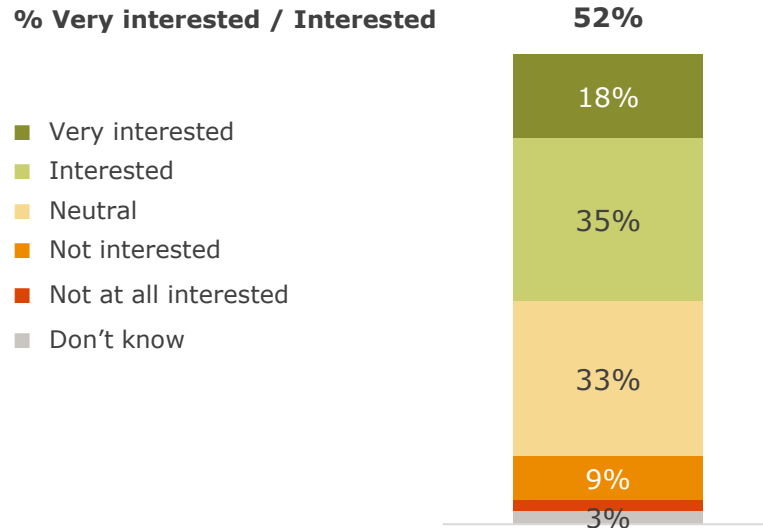
Q9. How would you generally prefer to receive information (e.g., updates on new services and resources, health & safety news, regulatory changes) from Energy Safety Canada (formerly ENFORM)? Please select up to three in preference order, with your top choice first.



Just over half of employers are interested in receiving services, resources or information to improve health and safety in their workplace.

Most of the rest are neutral, with only about one-in-ten reporting that they are not interested.

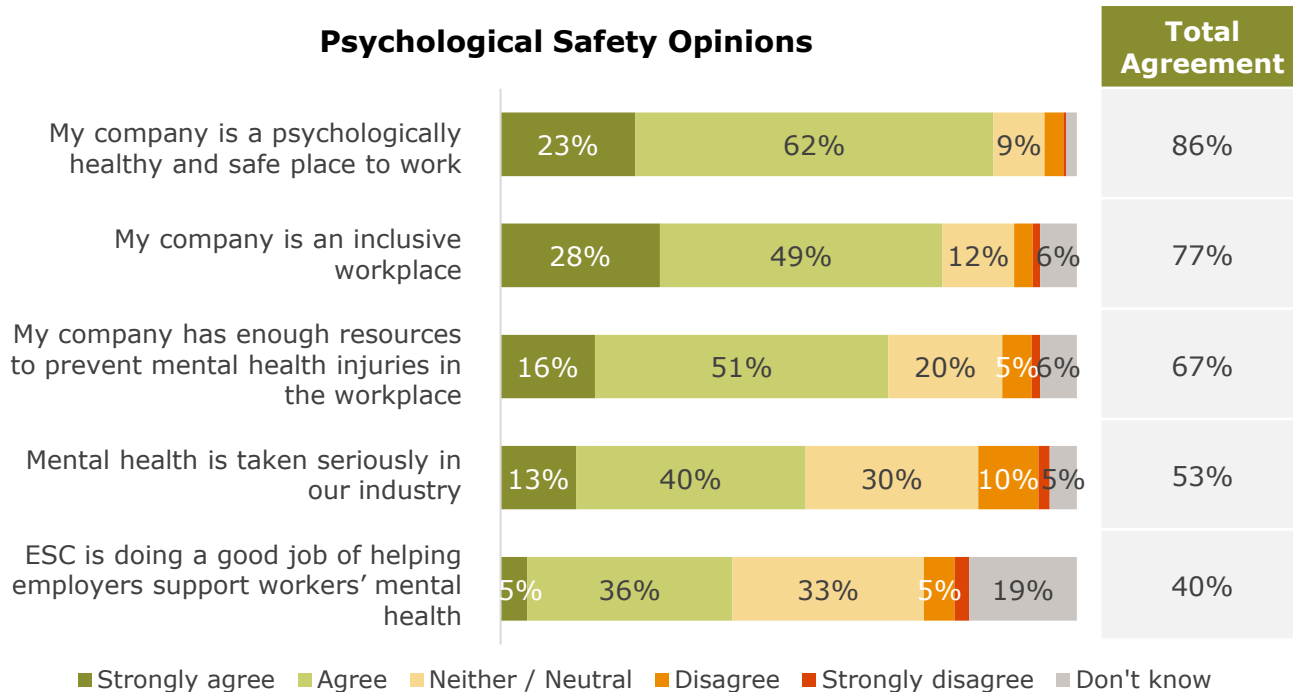
### Interest in Receiving Health & Safety Resources



# Most employers in oil and gas feel their company is psychologically healthy, safe and inclusive, and that they have enough resources to prevent mental health injuries in the workplace.

Just over half feel mental health is taken seriously in the industry; and most of the rest don't have an opinion.

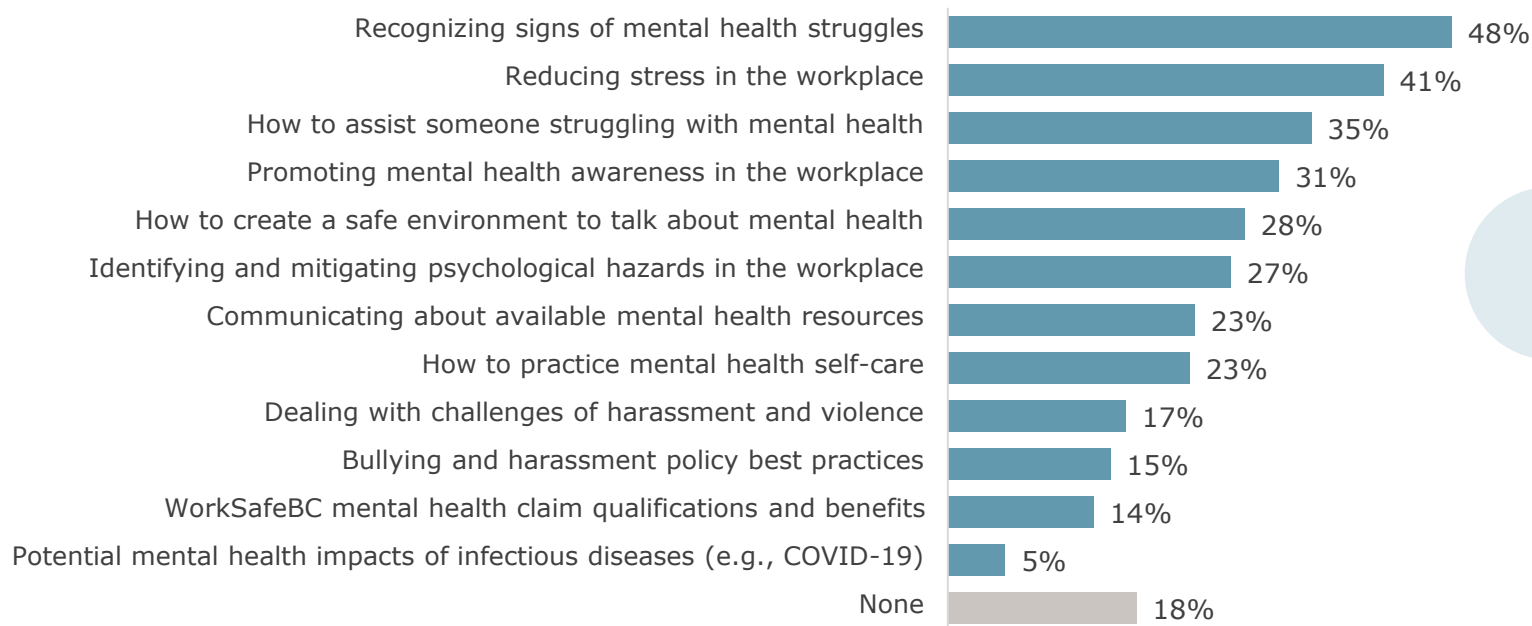
Two-in-five think ESC is doing a good job of helping employers support workers' mental health, reflecting that many are unsure (19%) or don't have an opinion either way (33%).



Most employers are interested in receiving information about mental health. The top topics of interest are recognizing and assisting those struggling with mental health and reducing workplace stress.

### Interest in Mental Health Information

(% of employers who would be interested in receiving more information)



**82%** of employers are interested in 1+ topics.

Sample: Total 2025 (173)

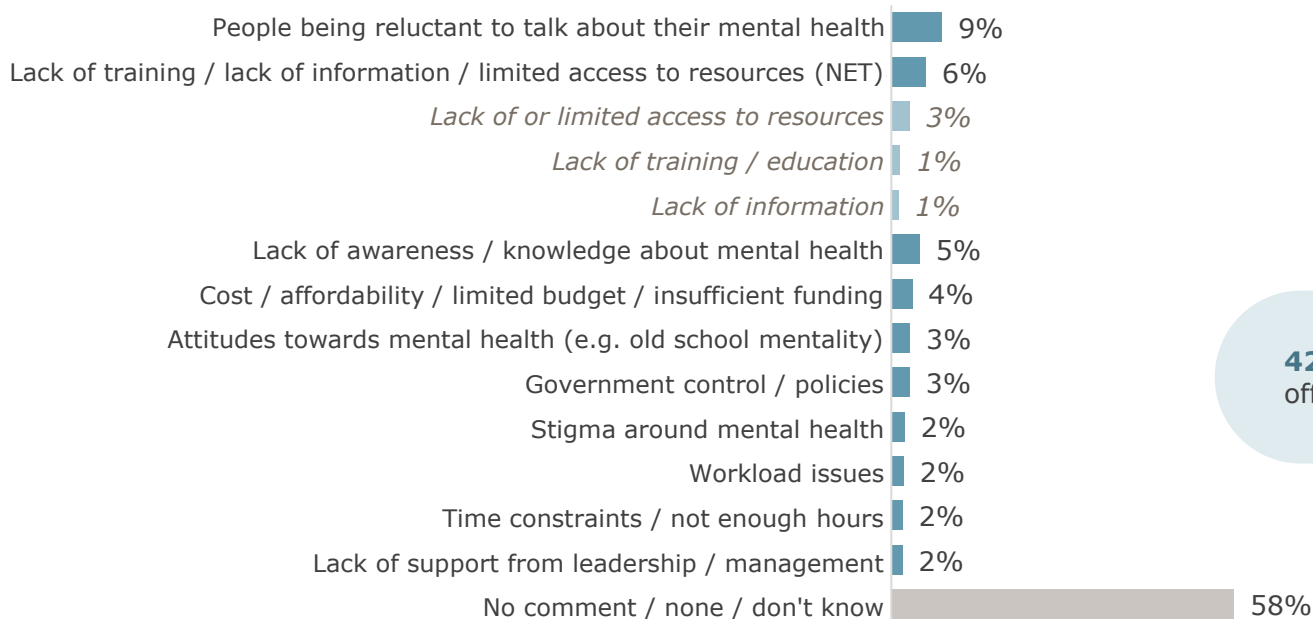
Note: Mentions of 'Other' (1%) are not shown.

Q14. Which of the following topics related to mental health in the workplace would you be most interested in receiving information about if they were available? Select all that apply.

Employers cite people's reluctance to talk about their mental health as the primary barrier to improving workplace mental health.

### Barriers Organizations Face to Improving Workplace Mental Health

(unaided comments)



**42%** of employers offered a comment

Sample: Total 2025 (173)

**New question in 2025**

Note: Only mentions of 2% or more are shown. Themes with <2% that are part of a net grouping are shown.

Q15. What barriers do you or your organization face (if any) in improving workplace mental health?

## Examples of Employer Comments on Barriers to Improving Workplace Mental Health



### PEOPLE BEING RELUCTANT TO TALK ABOUT THEIR MENTAL HEALTH

(9% mentioning)

*"People don't like to talk about mental issues they are experiencing, or they try to hide them."*

*"To openly speak about mental health in the workplace at a gas plant is just not something that happens. Appearing weak in front of peers with big egos is just not something a person with mental health issues would dare to do out here. It's a bit of a rough crowd."*

*"Getting employees to feel relaxed to share or tell their mental health status and what others can do to help them."*



### LACK OF TRAINING / LACK OF INFORMATION / LIMITED ACCESS TO RESOURCES (NET)

(6% mentioning)

*"Access to good training material."*

*"As a contractor, I'm not sure who you would go to if there were mental health issues in the workplace."*

*"The fact that there are no available psychologists available in our area, only counsellors."*

*"Accessible resources that are engaging and not boring."*



### LACK OF AWARENESS / KNOWLEDGE ABOUT MENTAL HEALTH

(5% mentioning)

*"General lack of awareness of mental health issues including recognition of mental health issues."*

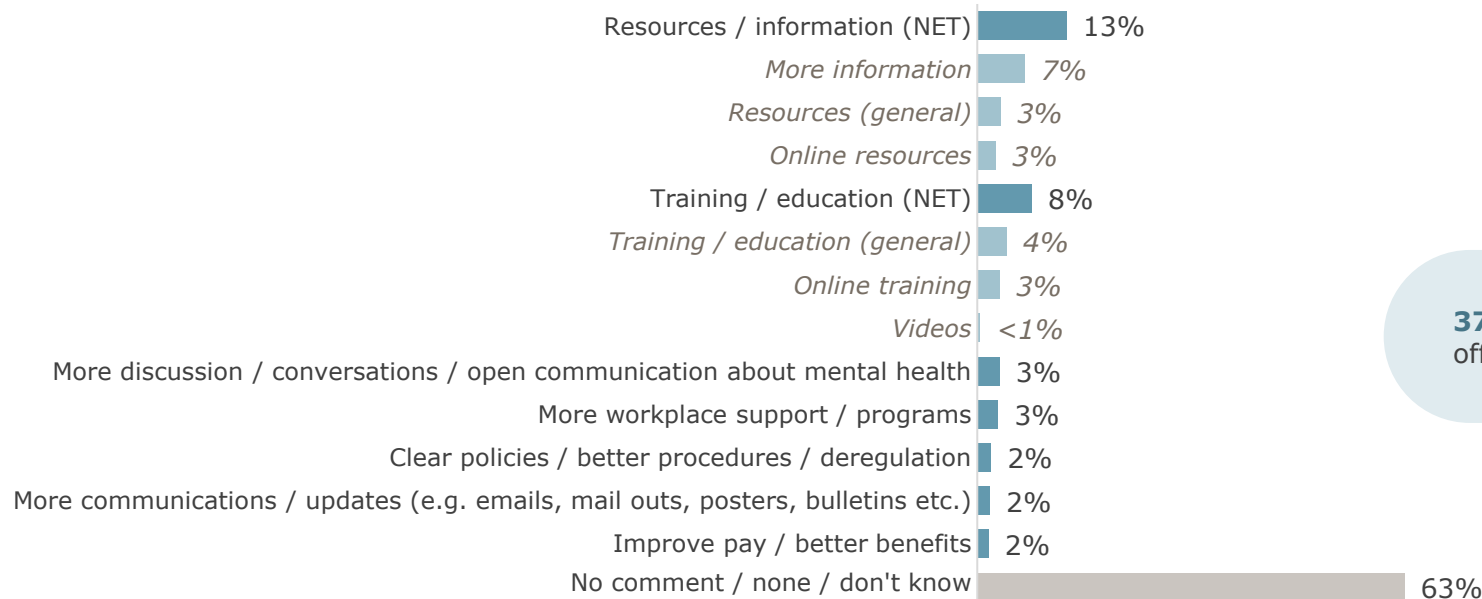
*"Mental health problems can be hard to understand for people who have never experienced them."*

*"Increased understanding of mental health and the effects that stress and constant pressure to perform have on people, both employee and management."*

Employers want more resources and information as well as training and education to improving workplace mental health.

### Desired Support Resources for Improving Workplace Mental Health

(unaided comments)



**37%** of employers offered a comment

Sample: Total 2025 (173)

**New question in 2025**

Note: Only mentions of 2% or more are shown. Themes with <2% that are part of a net grouping are shown.

Q16. What type of support and/or resources, if any, would help your organization improve workplace mental health?

## Examples of Employer Comments on Desired Support Resources for Improving Workplace Mental Health



### RESOURCES / INFORMATION (NET)

(13% mentioning)

*"Resources for employees to help their fellow employee state of mind / mind health."*

*"Online information, emails, mail outs. Advertisements - commercials."*

*"Information about mental health and how to develop a culture that supports and counsels people. Reduce the push to tough it out but seek the support available."*

*"Peer support, weekly check-ins with leadership, team-based realistic goal setting, and retiring the mindset that 'hustle and grind' is normal - it is not. Work/life balance must replace this notion."*



### TRAINING / EDUCATION (NET)

(8% mentioning)

*"Access to good training materials."*

*"Free or low-cost training for supervisors, and seminars."*

*"Online training courses."*

*"Videos about mental health."*

*"Legislations updates and training for upper management."*

Appendix



# Employer Profile

	Total
Sample	173
<b>Role in Organization<sup>1</sup> (self-reported)</b>	
Business owner	59%
Dedicated health and safety position	9%
Manager	9%
Bookkeeper / accountant	8%
Supervisor	6%
Senior executive	3%
Staff member	2%
Owner / operator (unaided)	1%
All of the above (unaided)	1%
Self-employed (unaided)	1%
Other	2%
<b>Employer Payroll Size (from sample listings)</b>	
Very Small	59%
Small	12%
Medium	3%
Large	3%
Unknown	23%

	Total
Sample	173
<b>Number of Employees in BC (self-reported)</b>	
None / No employees	18%
1-3 employees	59%
4-19 employees	15%
20-99 employees	4%
100+ employees	5%

<sup>1</sup>Showing roles with at least 1% total mentions.

Note: All data has been weighted by the estimated employer payroll size to match the target population.

Very Small: employers with a calculated 2025 assessable payroll amount less than \$150K, and a base WorkSafeBC assessment rate less than \$3K.

Small: employers with a calculated 2025 assessable payroll amount greater than or equal to \$150K, but less than \$600K, and/or a base WorkSafeBC assessment rate greater than or equal to \$3K, but less than \$12K.

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Large: employers with a calculated 2025 assessable payroll amount greater than or equal to \$1.6 million, and a base WorkSafeBC assessment rate greater than or equal to \$40K.