Canadians' Views and Perceptions Regarding Marine Shipping Safety
Angus Reid Institute and the Clear Seas Centre for Responsible Marine Shipping
Final Survey Questionnaire
(March 15, 2016)

Survey Specifications: National "general population" survey of 2,250 Canadian adults using the Angus Reid Forum online research panel. The sample plan calls for regional sub-sample boosts to 450 in both BC and the Atlantic region. Statistical weighting will be used to re-adjust the national results to be proportionally representative of the Canadian population.

Introduction

[Display as intro screen – include one or two general images of shipping, emphasizing freight]

Today we’re talking to Canadians about the subject of "marine shipping" which we will broadly define as transporting or shipping freight by sea.

We are NOT referring to other kinds of shipping such as the navy or cruise ships or luxury yachts or pleasure boating.

For the survey, we'll refer to marine shipping simply as "shipping" -- and, again, we're focusing on transporting freight by sea.

We are very much interested in people's views and impressions, even if you're not all that familiar with shipping and haven't thought about it much (until this survey!)

1. When you think about "shipping", what comes to your mind? Please select up to five words or phrases from the list below. Or type in any key words you don't see here on this list.

[RANDOMIZE LIST] [Now ordered positive/negative/neutral/ships to ease review/finalizing.]

Prosperity
History
Trade
Exports
Adventure
Romantic
Merchant Navy
Wasteful
Old-fashioned
Risky
Pollution
Oil spills
Lawlessness
Pirates
Smuggling
Oceans
Sailors
Harbours
High seas
Maritime
Nautical
Navigation
Huge ships
Barge
Tanker
Freighter
Crew
Seamanship
Ship-shape
Other (Specify:)

General image of marine shipping

2. Overall, would you say you have a generally positive or negative image of shipping?

Very positive
Somewhat positive
Somewhat negative
Very negative

3. How important do you think the shipping industry is for each of the following:

The Canadian economy

Communities on Canada's coastlines

Canada's access to goods from other countries

Canada's ability to export Canadian goods to other markets

Not important at all
Not that important
Fairly important
Very important
Critically important

4. Thinking generally about shipping in Canada, is your own impression that its importance has been growing or shrinking or staying about the same over the past 15 or 20 years or so?

Growing importance
Shrinking importance
Staying about the same

5. Setting aside for a moment the specific region of the country you live in -- to what extent, if at all, do you personally identify with Canada being a maritime or sea-faring nation?

Strongly identify with that
A fair amount
A bit
Do not identify with that at all

The public's "literacy" re marine shipping:

6. We'd like to get an idea of what people know and do not know about Canada's marine shipping industry. So, just a few quick questions we'd like your best estimate or guess on please.

a. What per cent of all the imported consumer goods Canadians use would you "guesstimate" arrive here by ship? (Let's include all the consumer goods that are made outside Canada and imported here -- and include everything, from clothes to housewares to cars to cosmetics.)

Use the slider below to indicate your estimate.

Slider scale 0 – 100%

b. Of all of Canada's trade with other countries -- exports and imports -- and including everything from raw commodities to consumer goods, what per cent of Canada's total trade would you estimate is transported by ship?

Slider scale 0 – 100%

[Display after Q6b:]
Just for your interest, some estimates show roughly 50% of Canada's trade [by volume] is shipped by sea. This includes roughly 20% of Canada's trade with the U.S.
And about 90% of Canada’s trade with other countries.

c. Here is a list including a number of Canada's major ports. Please select the 4 or 5 ports that you think are the biggest – that is, that ship the largest volume of freight in and out.

Belledune Port Authority
Halifax Port Authority
Hamilton Port Authority
Montreal Port Authority
Nanaimo Port Authority
Oshawa Port Authority
Port Alberni Port Authority
Prince Rupert Port Authority
Quebec Port Authority
Saguenay Port Authority
Saint John Port Authority
Sept-Îles Port Authority
St. John’s Port Authority
Thunder Bay Port Authority
Toronto Port Authority
Trois-Rivières Port Authority
Vancouver Fraser Port Authority
Windsor Port Authority

[Display after Q6d:]
Again, just for your information here is a map that shows many of Canada's ports.

[Canada map]

**Perceptions regarding the safety of marine shipping – general**

Let’s turn now to some safety issues concerning shipping in Canadian waters. When we say "Canadian waters" please consider that to include: inside Canadian ports and harbours, along Canadian coastlines, in the Great Lakes, St. Lawrence Seaway, and anything within Canada’s territorial waters (to the 200 mile international limit).

7. Generally speaking, what kind of overall safety rating would you give to shipping in Canadian waters? Would you say the shipping industry and its activities overall are:

Very safe
Generally safe
Generally unsafe
Very unsafe
8. More specifically, what types of potential safety issues and risks come to your mind when you think about the shipping industry and shipping in Canadian waters? (Select the potential risks you are most concerned about from the list below, or add to the list.)

[KEEP IN BLOCKS – RANDOMIZE BLOCKS]

Marine life/fish -- endanger
Fisheries – deplete stocks
Water pollution

Coastal environment
Noise
Natural beauty -- spoil

Ports/harbours – traffic
Ports/harbours -- pollution

Ships' fuel use/emissions
Potential for an oil spill
Potential for fuel spills

Potential for terrorism
Smuggling -- drugs/contraband
Human trafficking/people smuggling

Other risks (Specify:)_________________

9. We'd like to get an idea of how people weigh the economic contribution of marine shipping against the potential environmental risks. Using the scale below, please indicate what you think best describes this.

1 – Environmental risk totally outweighs economic contribution
2
3 -- 50/50 balance
4
5-- Economic contribution totally outweighs environmental risks

10. Using this same scale, how would you best describe these other Canadian industries?

[RANDOMIZE ITEMS]
Railway transportation
Trucking by road
Your provincial electrical utility
The oil industry

1 – Environmental risk totally outweighs economic contribution
2
3 -- 50/50 balance
4
5-- Economic contribution totally outweighs environmental risks

**Focused take-out on shipping oil**

Let’s turn our attention to the shipping of petroleum products such as oil and gas. Please focus on the specific issue of shipping petroleum products – and, to the extent that you can, let’s set aside for a moment views on the oil industry itself and fossil fuel (ghg) emissions and the debate about new pipelines etc.

11. Focusing specifically on the shipping aspect -- Overall, would you describe yourself as confident or worried about the safety of marine shipping of petroleum products in Canadian waters?

Very confident
Somewhat confident
Somewhat worried
Very worried

12. There are some specific issues about petroleum product (or oil and gas) shipping being discussed in Canada right now. Still setting aside, as much as possible, your views on issues such as fossil fuel emissions and pipelines and focusing specifically on shipping petroleum products by sea -- What is your overall view of each of the following:

[ROWS - RANDOMIZE]

Not allowing crude oil shipments along the north coast of BC
Not allowing ships to use heavy oil for fuel in Arctic waters
An increase in oil tanker traffic in the Bay of Fundy
An increase in oil tanker traffic around the south coast of BC
Shipping LNG (liquefied natural gas) in Canadian waters
Shipping oil through the Great Lakes and St. Lawrence Seaway
Let's turn for a moment to the subject of oil spills from tanker ships. A major oil spill is defined by the International Tanker Owners Pollution Federation (ITOPF) as a spill of 700 tonnes or greater. What would be your own estimate of how many such major oil spills have happened in Canadian waters (including Canadian harbours, Great Lakes and St. Lawrence Seaway, coastline and territorial waters) during the past 10 years? Would you estimate:

- None – no major oil spills in Canadian waters in the past 10 years
- 1 or 2 major oil spills
- 3 to 5
- 6 to 10
- 11 to 15
- 16 to 20
- 21 or more

Public confidence in key aspects of marine safety

Now, let's turn our attention briefly to the safety rules and regulations governing marine shipping in Canadian waters.

Based on whatever you might have seen or heard about this and on your own general impressions, how much confidence do you have in the overall safety rules and regulations covering marine shipping in Canadian waters today? Would you say you are:

- Very confident
- Fairly confident
- Not that confident
- Not confident at all
- Really can't say

Do you think this area of marine shipping safety receives the appropriate amount of attention from government in terms of the safety policies and procedures in place?

- Yes, appropriate amount
- No, not enough attention
- No, too much attention
Really can't say

15b. And do you think there is the appropriate amount of government attention in terms of the oversight and enforcement of the marine shipping safety policies?

Yes, appropriate amount
No, not enough attention
No, too much attention
Really can't say

Public confidence in key players

16a. Based on whatever you have seen or heard or on your own general impressions, would you say each of the following are doing a good job or a bad job in terms of their contribution towards safe shipping in Canadian waters today?

[Keep this order]
The shipping industry
Canada's port and harbour authorities
Your provincial government ("provincial governments" on the prairies)
The federal government overall
Specific federal departments and agencies (such as, Transport Canada, Environment Canada, Department of Fisheries and Oceans and the Canadian Coast Guard)
The International Maritime Organization -- a specialized agency of the United Nations that regulates shipping

[COLUNMS]
Really can't say
Very bad job
Bad job
Good job
Very good job

16b. We want to ask about two specific policies that are in place – these are briefly described below. For each one, please indicate if you think having that in place increases or decreases shipping safety in Canadian waters or if it makes no difference in your view. (If you feel you really can't say, please select that response).

[Rows – Rotate]
Response organizations – There are four official response organizations in Canada, certified by Transport Canada. Ships in Canadian waters pre-arrange to have a Response Organization respond in the event of a spill.

Marine pilotage – Ships operating in certain Canadian waters are required to use a licensed marine pilot with local knowledge of the waterway to guide them into port.

[COLUMNS]
Really can’t say
Decrease safety
No real impact
Increase safety

17a. Have you ever heard of the: World-Class Tanker Safety System?

Yes, have heard of it
Might have
No, have not heard of it

[FOR THOSE WHO HAVE HEARD OF IT OR MIGHT HAVE:]
b. How much confidence do you have in the World-Class Tanker Safety System? Are you:

Very confident
Fairly confident
Not that confident
Not confident at all

18. Have you ever heard of the: "Clear Seas Centre for Responsible Marine Shipping"?

Yes, have heard of it
Might have
No, have not heard of it

Socio-Demographic Info

Region/Province/Sub-region
Community size
Gender
Age
Education
HH income
Ethnicity (including indigenous)