

Marine shipping survey 2018

Angus Reid Institute and Clear Seas Centre for Responsible Marine Shipping

Penultimate draft questionnaire

September 28, 2018

Survey specifications: National “general population” survey of 2,250 Canadian adults using the Angus Reid Forum online research panel. The sample plan includes regional sub-sample boosts in BC and the Atlantic provinces (to 450 completes in each). Statistical weighting was used to re-adjust the national results to be proportionally representative of the Canadian population.

Introduction

[Display as a standalone screen – include general images of shipping, emphasizing cargo]

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

We are NOT referring to other kinds of shipping such as the Navy, cruise ships, luxury yachts, pleasure boating or commercial or recreational fishing.

For the survey, we’ll refer to marine shipping simply as “shipping.” Again, focusing on transporting cargo or freight by sea.

We are interested in your views and impressions, even if you’re not all that familiar with shipping and haven’t thought about it much before.

Q1. 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 words you don’t see here on this list.

[RANDOMIZE]

Modern

Outdated

Safe

Risky

Important

Unimportant

Efficient

Wasteful

Clean

Polluting

Local

Global

Essential

Unnecessary

Imports

Exports

Prosperity
Poverty
Economy
Environment
Oceans
Harbours
Ports
Navigation
Huge ships
Seafarers
Other, specify: _____

General image of marine shipping

Q2. Overall, would you say you have a generally positive or negative image of shipping?

Very positive
Somewhat positive
Somewhat negative
Very negative

Q3. How important do you think the shipping industry is for each of the following?

[ROWS – RANDOMIZE]

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

[COLUMNS]

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

Q4. 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

Q5. 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?

Do not identify with that at all

A bit

A fair amount

Strongly identify with that

Q6. Shifting the focus closer to home now, how important do you think the shipping industry is for each of the following?

[ROWS – RANDOMIZE]

The community where you live

Your province's economy

[ANCHOR] Your own day-to-day life

[COLUMNS]

Not important at all

Not that important

Fairly important

Very important

Critically important

The public's "literacy" re: marine shipping:

Q7. 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%

Q8. Now, let's think about your own day-to-day life. Of all of the products you use on a daily basis, from the food you eat to the clothes you wear to the computer, tablet or mobile phone on which you're doing

this survey, what proportion of these items would you estimate were transported by ship before they got to you?

- The vast majority – nearly all of them
- Most of them
- About half
- Less than half
- Very few – hardly any of them

[Standalone screen - Display after Q8:]

Just for your interest, some estimates show roughly 50% of Canada's trade 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. An estimated 70-80% of the items that we are surrounded by and use daily are brought to us by ship.

Q9. 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 cargo 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](#)

[Standalone screen – Display after Q8]

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

Q10. 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 and St. Lawrence Seaway, and anything within Canada's territorial waters (to the 200 nautical mile international limit).

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

Q11. 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 -- endanger
Water pollution

Coastal environment
Noise
Natural beauty -- spoil

Ports/harbours -- traffic
Ports/harbours -- pollution

Ships' fuel use/greenhouse gas emissions/air pollution
Potential for an oil spill
Potential for fuel spills

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

[ANCHOR]Other risks (Specify:)

Q12. We'd like to get an idea of how people weigh the economic contribution of marine shipping against the potential environmental risks. Using the slider scale below, please indicate what you think best describes this.

1 -- Economic contribution totally outweighs environmental risks

2

- 3 -- 50/50 balance
- 4
- 5 -- Environmental risk totally outweighs economic contribution

Q13. 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-Economic contribution totally outweighs environmental risk
- 2
- 3- 50/50 balance
- 4
- 5 – Environmental risk totally outweighs economic contribution

Focused take-out on shipping oil

Q14. 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, set aside for a moment views on the oil industry itself, greenhouse gas emissions and air pollution, the debate about new pipelines, etc.

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

Q15. There are some specific issues about petroleum product (e.g. 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 or carry heavy fuel oil 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

[COLUMNS]

Strongly oppose

Moderately oppose

Moderately support

Strongly support

Q16. 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 (roughly equivalent to 1/3 of the volume of an Olympic swimming pool).

What would be your own estimate of how many such major oil spills have happened in Canadian waters (including Canadian ports and harbours, the Great Lakes and St. Lawrence Seaway, coastal and territorial waters) during the past 10 years? Would you estimate:

1 or 2 major oil spills

3 to 5

6 to 10

11 to 15

16 to 20

21 or more

None – no major oil spills in Canadian waters in the past 10 years

Public confidence in key aspects of marine safety

Q17. 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 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

Q18. 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

Q19. And, do you think there is an appropriate amount of government attention in terms of the oversight and enforcement of marine shipping safety policies?

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

Public confidence in key players

Q20. 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 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 (BC, ON, QC, ATL – "provincial governments" in AB, SK, and MB)
- The federal government overall
- Specific federal departments and agencies (such as Transport Canada, Environment and Climate Change Canada, Fisheries and Oceans Canada and the Canadian Coast Guard)
- The International Maritime Organization – an agency of the United Nations that regulates shipping

[COLUMNS]

- Really can't say
- Very bad job
- Bad job
- Good job
- Very good job

Q21. We want to ask about two specific policies that are in place, which are briefly described below.

For each one, please indicate if you think having that policy 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 – RANDOMIZE]

Response Organizations – There are four official response organizations in Canada, certified by Transport Canada. Ships operating in Canadian waters must have a contract with a Response Organization to respond in the event of a ship-source oil spill (the polluter pays clean-up costs)

Marine Pilotage – Ships operating in certain Canadian waters are required to use licensed marine pilots with local knowledge of the waterway to guide them into and out of port.

[COLUMNS]

Really can't say
Decrease safety
No real impact
Increase safety

Q22. Have you ever heard of the "Oceans Protection Plan"?

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

Q23. The Oceans Protection Plan is the federal government's program for protecting Canada's coasts and waterways while growing the economy. It features the Canadian government's largest-ever investment in these issues.

This investment of \$1.5 billion over 5 years is intended to create a world-leading marine safety system; restore and protect marine ecosystems and habitats; create stronger local emergency response capacity by establishing Indigenous partnerships and by engaging coastal communities; and invest in oil spill cleanup research and methods.

How much confidence do you have in the Oceans Protection Plan to protect Canada's coasts and waterways? Are you:

Very confident
Fairly confident
Not that confident
Not confident at all

Q24. Have you ever heard of "Clear Seas Centre for Responsible Marine Shipping"?

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

[FOR THOSE WHO HAVE HEARD OF IT OR MIGHT HAVE:]

Q25. When you think of "Clear Seas Centre for Responsible Marine Shipping", what comes to your mind?

Please select up to three words or phrases from the list below. Or type in any words you don't see here on this list.

[RANDOMIZE]

Independent
Subjective

Unbiased
Biased
National
West-coast focus
Trustworthy
Untrustworthy
Effective
Ineffective
Safety
Sustainability
Information
Research
Lobbying

Q26. And, how much would you say you trust Clear Seas Centre for Responsible Marine Shipping? Do you have ...

Complete trust in the organization
A lot of trust
Some trust
Not much trust
No trust at all in the organization

Socio-Demographic Info

QPostalCode. Please enter the first three characters of your postal code. (Example: A1A)

QEthnicity. Which of the following ethnic groups do you/did your ancestors belong to? (choose all that apply)

First Nations/Aboriginal/Metis/Inuit
Caucasian
Black
Chinese
Other Asian (Japanese, Korean, Vietnamese, Filipino, etc.)
South Asian (Indian, Pakistani, Bangladeshi, Sri Lankan, etc.)
European
Latin American (Mexican, Central American, South American, etc.)
Middle Eastern (Lebanese, Iranian, Armenian, etc.)
Prefer not to answer
Other

Region/Province/Sub-region
Community size

Gender

Age

Education

HH income

Ethnicity (including indigenous)