

Marine Shipping Survey 2020

Angus Reid Institute and Clear Seas Centre for Responsible Marine Shipping

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 ship in Canadian waters.

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 ship.

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.

Multi-choice, Max 5.

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Outdated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: _____

New. Q2.
Single choice

Do you personally know anyone who works or has worked in the marine shipping industry?

Yes, know someone currently working
Yes, know someone who did
No

General image of marine shipping

Q3.
Single choice

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

Very positive
Somewhat positive
Somewhat negative
Very negative

Q4.
Single choice grid

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 countries

[COLUMNS]

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

Q5.

Single choice

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

Q6.

Single choice

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

Q7.

Single choice grid

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

[Rows – Rotate first two]

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:

Q8a.

Slider

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.

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%

Q8b.
Slider

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%

Q9.
Single choice

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 Q9:]

Just for your interest, an estimated 70-80% of the items that we are surrounded by and use daily are brought to us by ship.

Q10.
Single choice

Has the COVID-19 pandemic had any impact on your own overall awareness of how products move around the world (the global supply chain) and international freight transport, including marine shipping?

- No, no impact on your awareness
- Yes, now somewhat more aware
- Yes, now a lot more aware of these things

Perceptions regarding the safety of marine shipping – general

Q11.

Single choice

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

Q12.

Single choice

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
Ships dumping waste/garbage

Coastal environment
Arctic environment – fragile
Noise
Natural beauty – spoil

Ports/harbours – traffic
Ports/harbours – pollution
Ports/harbours – space/ land use

Greenhouse gas emissions/air pollution
Potential spills from oil tankers
Potential spills of ship fuel

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

New. Q16.
Single choice

Once the world starts to recover from the COVID-19 pandemic and the associated disruption it has caused, where would you place the priority for marine shipping? Would you say:

- 1 – Economic recovery must come first post-pandemic
- 2
- 3 – 50/50 balance
- 4
- 5 – Environmental protection has to be the top priority

Focused take-out on shipping oil

Q17.
Single choice

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

Q18.
Single choice grid

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 or waterway – 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

Q19.

Single choice

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

Q20.

Single choice

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

Q21.

Single choice

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

Q22.

Single choice

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 oversight/enforcement

No, too much oversight/enforcement

Really can't say

Public confidence in key players

Q23.

Single choice grid

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, and Fisheries and Oceans Canada)

The Canadian Coast Guard

The International Maritime Organization – an agency of the United Nations that regulates shipping

[COLUMNS]

Very bad job

Bad job

Good job

Very good job

Really can't say

Q24.

Single choice grid

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]

Decreases safety

No real impact

Increases safety

Really can't say

Clear seas-focused

Q25.

Single choice

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

New. Q26.

Base=Exclude no in Q25

Multi choice

How did you hear about Clear Seas?

Web search

Social media such as Twitter, LinkedIn or Facebook

Friend or colleague

Media coverage (news, radio, etc.)

Other: _____

Q27.

Base=Exclude no in Q25

Multichoice, max 3.

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

Q28.

Base=Exclude no in Q25

Single choice

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

QD1.

One last quick question for our statistical analysis.

What is your own ethnic or racial background? Are you:

(Many people come from a mixed background. In that case, please just select all that may apply.)

[This order]

Indigenous Canadian

White (Caucasian) from UK/France/elsewhere in Europe

Black (ie: African/Caribbean)

South Asian (ie: Indian/Pakistani)

Chinese

Filipino

Other East Asian (ie: Korean, Japanese, Southeast Asian)

Middle Eastern/West Asian (e.g. Arab, Iranian, Afghani)

Latin American (e.g. Mexico, Central/South America)

Other (Specify): _____

Prefer not to say