

Canadians feel confident that marine shipping is safe, but they have reservations about transporting oil

Majorities oppose expanded oil shipping in the Bay of Fundy and around B.C.'s south coast

April 5, 2016 – Canadians see their nation as a sea-faring one and have mostly positive views about shipping and its contribution to the country – at least to some degree.

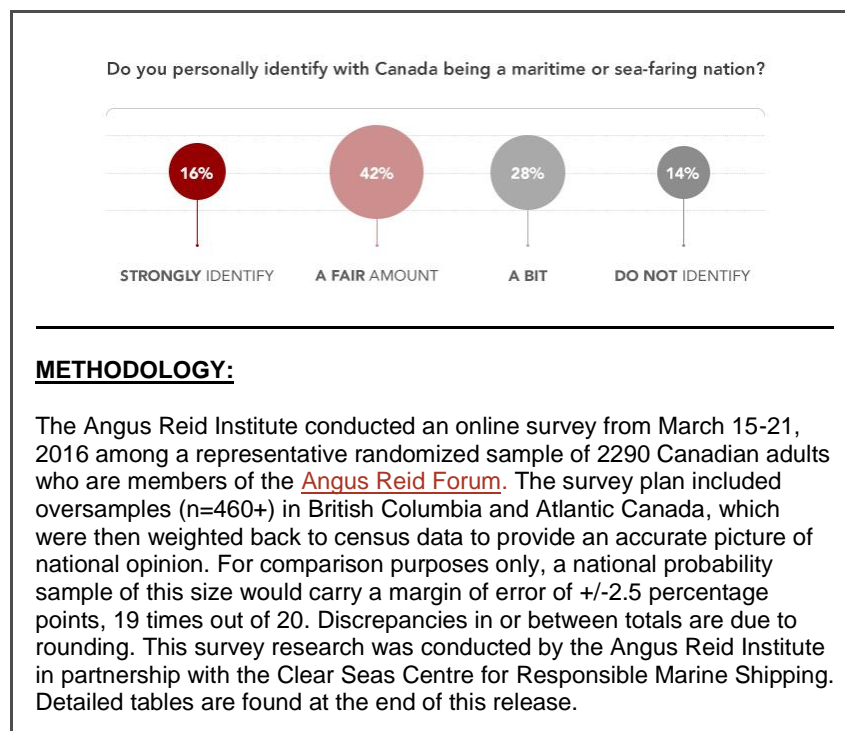
Unsurprisingly, it's Canada's coastal regions who feel this most strongly. But while the majority of Canadians are comfortable shipping liquefied natural gas, when asked about the shipping of petroleum products in territorial waters, people in this country – including on the coasts – are markedly less enthusiastic.

These findings emerge from an *Angus Reid Institute* public opinion poll conducted in partnership with the [Clear Seas Centre for Responsible Marine Shipping](#).

This comprehensive national survey - intended as a benchmark of public attitudes concerning marine shipping – also finds most Canadians have confidence in existing oversight mechanisms to ensure industry safety, but considerable concern that not enough attention is paid to them.

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Key Findings:

- Canadians believe marine shipping makes an important – even critical – contribution to the economy, facilitates international trade and benefits coastal communities (three-quarters described shipping as critically or very important in each case)
- Three-quarters (73%) of Canadians rate the marine shipping industry and its activities as “generally safe” and another one-in-five (21%) say it is “very safe”
- Two-in-five (40%) Canadians describe themselves as “very” or “somewhat worried” about the safety of transporting petroleum in Canadian waters
- Narrow majorities of Canadians oppose expanded oil tanker traffic in the Bay of Fundy (57%) and along British Columbia’s south coast (55%), and support (53%) the federal government’s [moratorium on crude oil shipments](#) along the northern coast of B.C.

Part 1: The public image of shipping in Canada

Canada as a maritime nation

The history of Canada is inextricably linked to its waters. Before Hudson and Cartier, before even Leif Eriksson and his Viking settlers in Newfoundland, the ocean was a vital source of sustenance for Canada’s coastal First Nations.

But to what extent do Canadians today identify as citizens of a maritime or sea-faring nation? Across the country, almost six-in-ten said they identify as such “strongly” (16%) or “a fair amount” (42%), and another three-in-ten (28%) said “a bit”, leaving only one-in-seven saying “not at all” (14%).

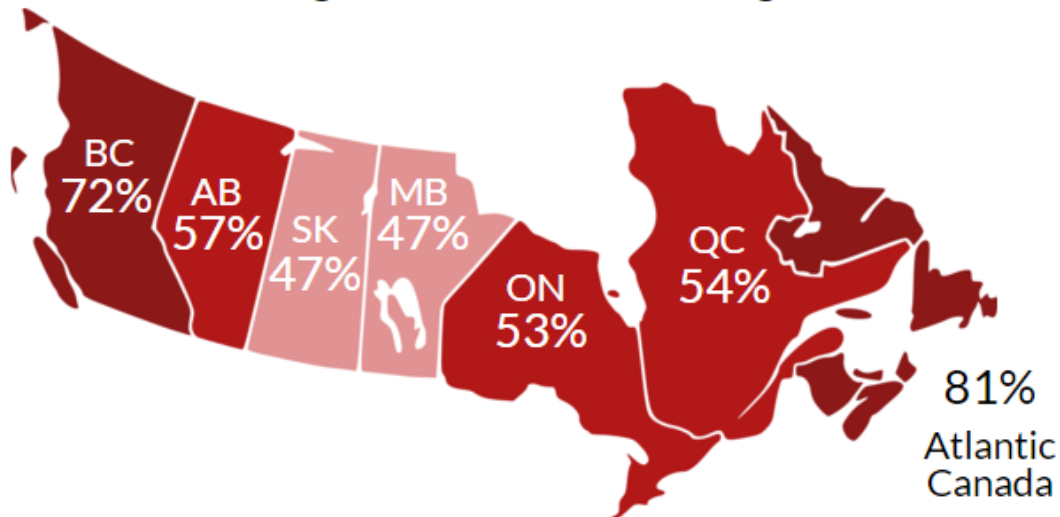
Predictably, this identification is much stronger among Canadians living in coastal regions, where roughly three-in-four people share this maritime view of Canada (72% in BC and 81% in Atlantic Canada, where almost half *strongly* identify this way).

Canadians living in between – i.e., across the vast expanse from Alberta through Quebec – also share this identification, though less intensely. Roughly one-in-ten in these regions say they identify “strongly”, and another four-in-ten say “a fair amount”. Given the size and importance of the St. Lawrence Seaway, Quebecers’ identification of Canada as sea-faring is – notably – very similar to that found in Ontario and on the Prairies:

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Percentage who personally identify with Canada being a maritime or sea-faring nation?



This maritime identification is also much more strongly held by older Canadians and by men (and especially by older men). These groups and their comparable facing cohorts – younger Canadians and women – have notably divergent views on a number of the issues canvassed in this survey.

While significant in and of themselves, these differences are less fundamental to the understanding of Canadian views on the shipping industry than the regional perspectives which therefore receive more attention in this report (for more on the different perspectives across demographic groups, [see comprehensive tables](#)).

What do we associate with the industry?

What comes to mind when Canadians think about shipping? Survey participants – asked to consider this age-old marine activity specifically as “transporting or shipping freight by sea” – highlighted the following associations:

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Industry image, economic importance:

More than four-in-five – a total of 86 per cent of Canadians surveyed in this ARI/Clear Seas poll described their overall view of the shipping industry as positive (20% very positive, 66% somewhat positive), with only 14 per cent indicating a negative image (1% very, 13% somewhat).

And here again, the coastal regions share both a sense of identity and positivity tied to shipping: Atlantic Canadians and British Columbians are most likely to express very positive overall views, joined by land-locked Albertans (who also have the most confidence in the safety of marine shipping, including the transport of oil and gas).

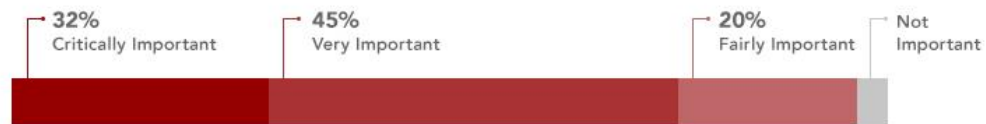
Canadians also generally see shipping as important to the economy and its coastal communities:

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How important is the shipping industry for:

CANADA'S ABILITY TO EXPORT



CANADA'S ACCESS TO GOODS



THE CANADIAN ECONOMY



COASTAL COMMUNITIES



Interestingly, Canadians appear to assume shipping may lift more weight on the movement of goods in and out of the country than it actually does. This, in turn, may drive their perception of shipping's importance: asked for their estimate of how much of the total volume of Canada's trade moves by ship, Canadians' responses range widely, with almost six-in-ten pegging it at 60 per cent or more. This is well higher than the most recent estimate that roughly 45 per cent of total trade moves in and out over water.

Canadians living in the two main coastal regions assign the highest importance to shipping's impact. Atlantic Canadians are especially likely to consider shipping to be "critical" for coastal communities (38%), while BC residents attach the highest importance to what shipping means for Canadian exports (42%).

The public is also far more likely to see the industry as one "growing" than "shrinking", indeed, by a four-to-one margin (43% versus 10%). Almost half (47%) opted for "staying about the same".

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The perception that shipping is growing in importance is the full majority view in B.C. (52%). It is also much more prevalent among Canadians who more strongly identify their country as a maritime or seafaring nation (51% versus 30% of those who share this identification only a bit or not at all).

Part 2: Public perceptions on marine shipping safety

Canadians think of shipping as an industry that is generally safe and one – though far from overwhelming in national consensus – in which the economic benefits tend to outweigh the environmental risks. At the same time, however, there is a much larger constituency of concern when it comes to the specific issue of shipping petroleum products in Canadian waters.

Asked what kind of overall safety rating they would give to the shipping industry and its activities, a large majority of Canadians opt for safe – 21 per cent say “very safe” while the bulk (73%) choose “generally safe”. The rest – only seven per cent – view the Canadian shipping industry as generally or very unsafe:



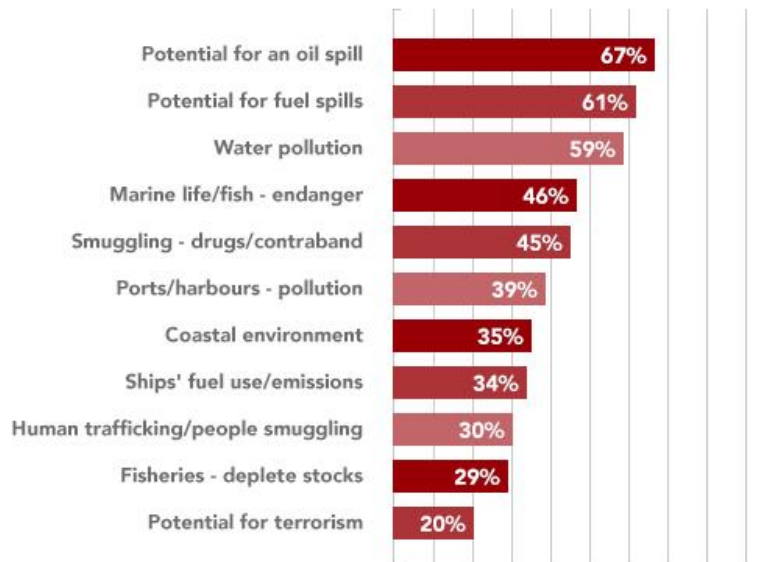
When it comes to risks associated with shipping in Canadian waters, oil or fuel spills top the list, while the next tier of apprehensions largely consist of the potential consequences of shipping petroleum products – for example, water pollution, endangered marine life and fisheries depletion.

Non-environmental risks such as crime and terrorism are also on the public radar, but don't rank as highly as potential environmental risks:

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What types of safety issues and risks come to mind when you think about shipping in Canadian waters?



Oil spills' top ranking on Canadians' list of shipping safety concerns is accompanied by an over-estimation on the part of the public regarding the frequency of such spills.

Asked to estimate how many “major” oil spills¹ have occurred in Canadian waters in the past 10 years, roughly equal numbers (approximately three-in-ten) guessed “one or two”, “three to five”, or “six or more” major spills. One-in-seven (14%) opted for the correct answer: no *major* oil spill has occurred in Canada in the last decade.

Indeed, that several smaller spills and fuel leaks of less than 700 tonnes have occurred – and captured headlines – is a matter of public record. The survey question, however, specifically asked about (and briefly defined) *major* oil spills.

¹ Respondents were provided with the ITOPF (International Tanker Owners Pollution Fund) definition of “major spills,” which are those 700 tonnes or greater

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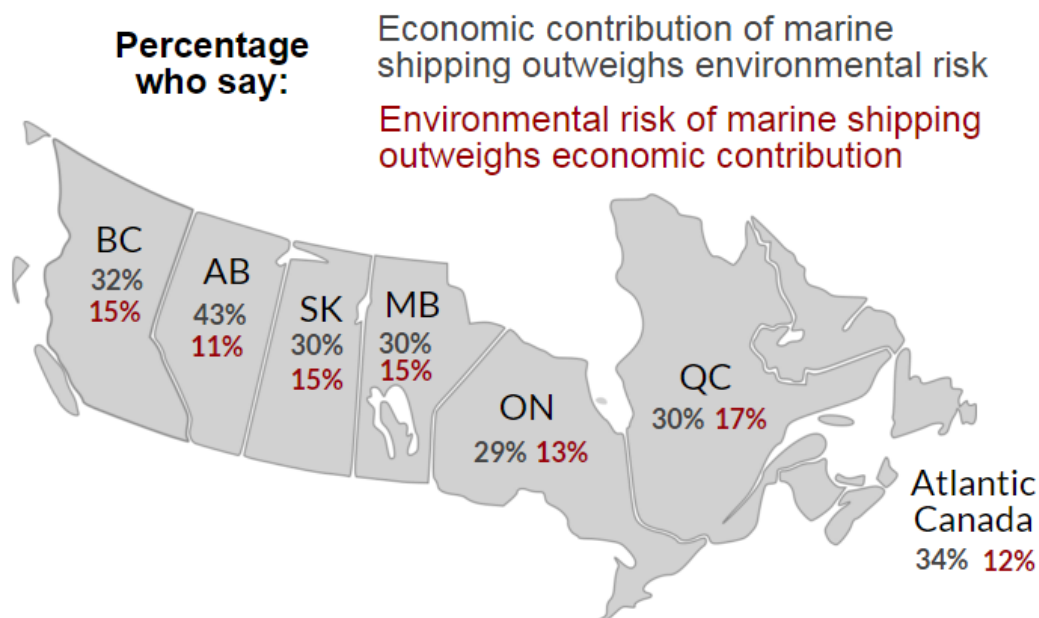
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Economic contribution versus environmental risk

Given this view, it is notable that Canadians surveyed were twice as likely to say they believe that marine shipping's "economic contribution outweighs the environmental risks" than they were to take the opposing view (31% versus 14%). But just over half (55%) of the Canadians surveyed opted for the mid-point "3" on the 5-point scale – indicating a belief that there is a fairly equal balance between the industry's economic contribution and environmental risks.

As seen throughout these ARI/Clear Seas survey results – there are noteworthy differences in regional perspectives. Albertans express the strongest opinion that shipping brings more economic benefits than environmental risks (43% versus 11%).

Meanwhile, Quebecers tend to offer a slightly more cautious view about shipping in this context (with a narrower margin of 30% versus 17%). As for Canadians living in the coastal regions, B.C. residents' assessment closely reflects the overall national results, while Atlantic Canadians tilt only slightly more in favour of a net economic benefit (and well short of the enthusiasm of their Alberta compatriots). ([see comprehensive tables](#)).

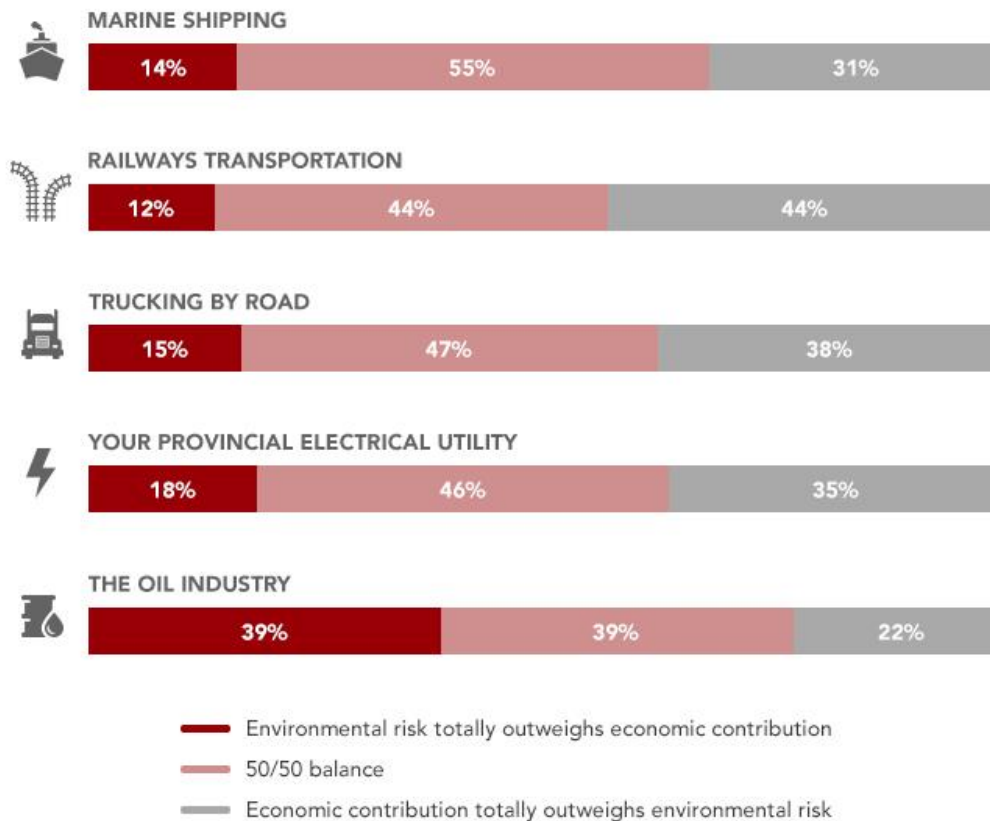


When measured against other heavy industry, Canadians offer similar assessments, particularly with respect to railway and ground transportation. Provincial electrical utilities are seen to tilt most heavily toward economic benefit (especially in Quebec), while the oil industry leans most heavily the other way (in Alberta, [opinion is split](#)).

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How would you describe these Canadian industries? (National results shown)



Focus on shipping oil

Given the relatively widespread concern about the environmental risk of the oil industry, and given that oil-related issues top Canadians' list of shipping safety concerns, it will not be surprising that Canadians are considerably more worried about shipping petroleum products such as oil and gas than they are about the safety of marine shipping generally.

The survey design took care to ask respondents, to the extent possible, to set aside their views on the oil industry itself and fossil fuel emissions and pipeline debates etc.

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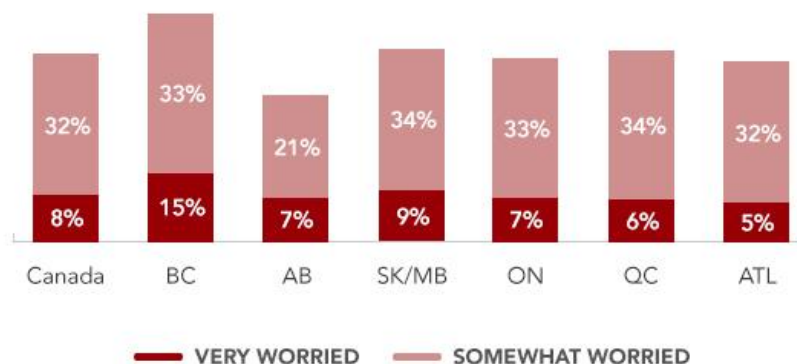
As the following graph indicates, 60 per cent of Canadians say they are very (12%) or somewhat (48%) confident while 40 per cent describe themselves as very (8%) or somewhat (32%) worried about shipping petroleum products in Canadian waters.

Overall, would you describe yourself as confident or worried about the safety of marine shipping of petroleum



Again, important regional differences are at play. Albertans distinguish themselves for being far less likely to place themselves in the "worried" camp – fewer than three-in-ten (27%) do so. This contrasts most sharply with their neighbours to the west. In British Columbia, this figure is fully 20 points higher, producing an even split there. The other main regions tend to reflect the national average, Ontario and Quebec precisely so. These regional results are highlighted in the graph that follows.

Overall, would you describe yourself as confident or worried about the safety of marine shipping of petroleum



Notwithstanding the questionnaire's reminder to respondents to try to focus as much as possible on shipping, Canadians' overall orientation as confident or worried about transporting petroleum products

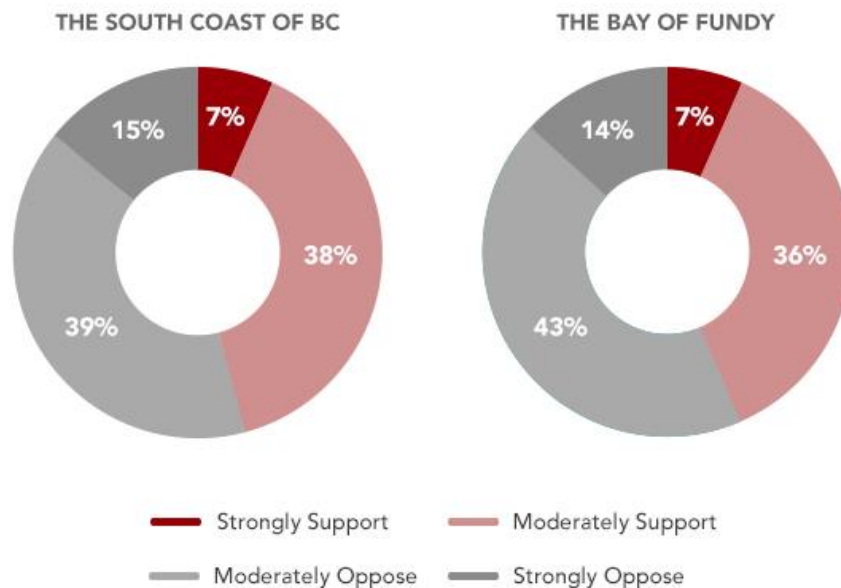
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over water is broadly consistent with the Canadian public opinion landscape on the oil industry and climate change more generally. The socio-demographic groups most likely to describe themselves as “worried” are the same as the ones who have expressed more concerns and negative views of the resource industry in [other ARI surveys](#).

Faced with six specific scenarios relating to oil and shipping, this survey also finds considerable public unease about the increased tanker traffic the proposed [Kinder Morgan and Energy East pipelines](#) could bring to both coasts, with the majority (57%) opposed to increased oil tanker traffic in the Bay of Fundy (57%) and the south coast of BC (55%):

View of an increase in oil tanker traffic in:

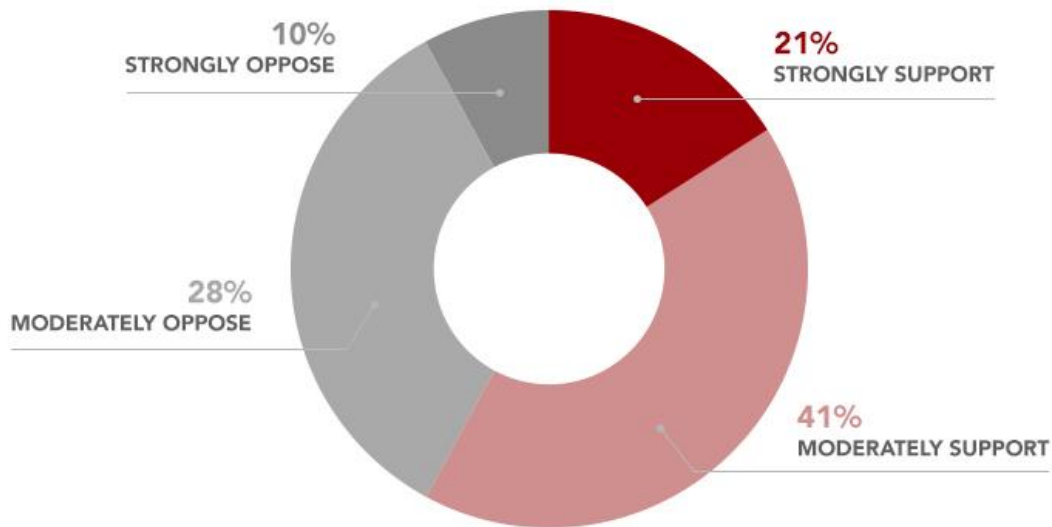


Canadians' views are stronger yet when it comes to moving heavy oil by ship through Arctic waters (62% support this prohibition):

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What is your overall view on not allowing ships to use heavy oil for fuel in Arctic waters?



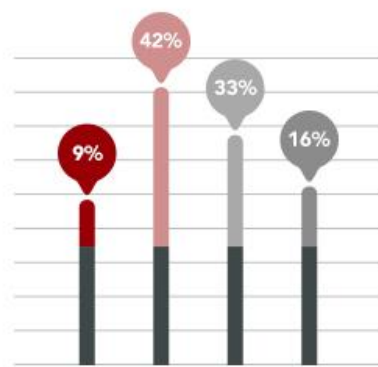
Public opinion is divided on two other policy proposals assessed relating to the movement of oil along the north coast of BC and the Great Lakes and St. Lawrence Seaway:

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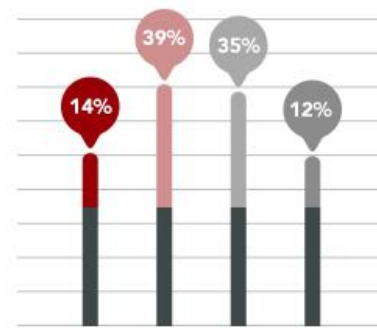
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What is your overall view on:

Shipping oil through the Great Lakes and St. Lawrence Seaway



Moratorium on crude oil shipments along the north coast of BC



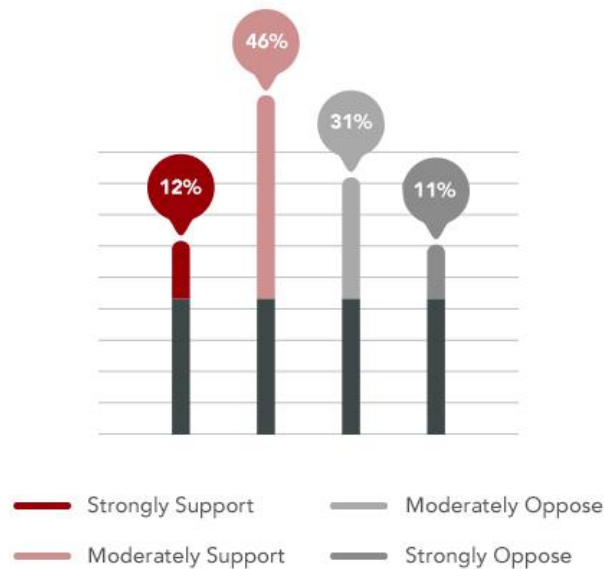
Strongly Support Moderately Oppose
Moderately Support Strongly Oppose

Lastly, the majority of Canadians surveyed (58%) voiced overall support for shipping LNG (liquefied natural gas) in Canadian waters:

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What is your overall view on shipping LNG (liquefied natural gas) in Canadian waters?



Canadians' assessment of these specific policies, not surprisingly, has a great deal to do with their overall orientation on the safety of shipping petroleum products. The four-in-ten Canadians who are "worried" about shipping oil solidly reject all of these proposed expansions and are especially adamant about increased tanker traffic in the Bay of Fundy or the south coast of BC. On the other hand, these proposals are supported by most of those who are "confident" about the safety of marine shipping of oil and gas.

Of course, there are major differences on petroleum shipping policies, depending on where Canadians live. Regionally, support for expanding oil shipping is consistently highest in Alberta, where a full majority voice support for each policy assessed with the one exception of ships using heavy oil. Public opinion is more consistent – and considerably more wary – across other regions:

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Regional support for specific oil shipping policies							
	Canada (%)	BC (%)	AB (%)	SK/MB (%)	ON (%)	QC (%)	ATL (%)
An increase in oil tanker traffic around the south coast of BC	45	43	55	44	41	47	48
An increase in oil tanker traffic in the Bay of Fundy	43	44	60	46	37	40	45
Not allowing ships to use heavy oil for fuel in Arctic waters	62	62	52	69	63	64	63
Moratorium on crude oil shipments along the north coast of BC	53	54	39	53	54	57	51
Shipping oil through the Great Lakes and St. Lawrence Seaway	51	50	59	53	49	50	58
Shipping LNG (liquefied natural gas) in Canadian waters	58	58	65	64	56	53	62

Demographic differences are once again noted: women and younger Canadians (and especially young women) are most reticent about these various policies, while men and older Canadians are more supportive. The gap in support is significant, averaging over 10 points. The survey results also show more affluent Canadians extending higher support for expanded shipping of petroleum products. ([For greater detail, see comprehensive tables.](#))

Part 3: Measuring confidence in shipping safety and oversight

Rules and regulations governing shipping

Canadians express overall confidence in the safety rules and regulations governing shipping in Canadian waters: only one-in-ten (12%) say they are “very confident” but fully half (53%) say they are “fairly confident” in this regard. This still leaves a sizeable three-in-ten (28%) Canadians who say they are “not that” or “not confident at all”.

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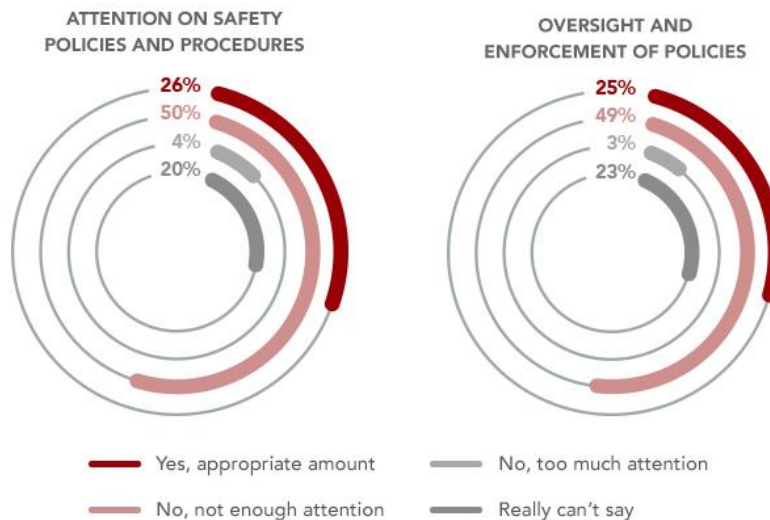
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How confident are you in the safety rules and regulations covering marine shipping in Canadian waters today?



At the same time, there is fairly widespread concern that this area merits more attention from government. Just one-in-four Canadians surveyed described current levels of government attention as appropriate, while roughly half said “not enough” attention is paid in terms of the safety policies and procedures in place and government oversight and enforcement of these policies:

Do you think marine shipping safety receives the appropriate amount of:



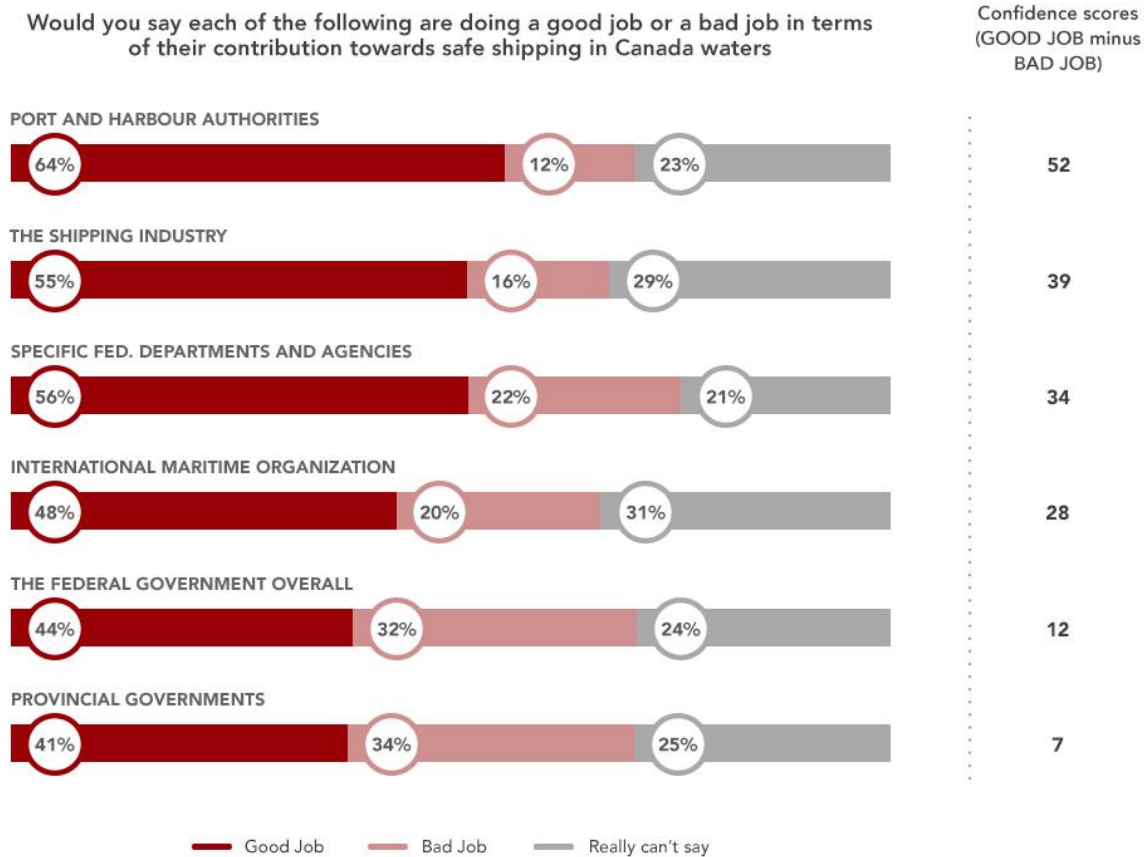
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Views on key players:

This ARI/Clear Seas survey also asked Canadians to rate the job performance key players are doing in terms of their contribution towards safe shipping in Canadian waters today.

Canada's port and harbour authorities emerge with the most positive overall appraisal of the half dozen agencies assessed:



Once again, the regional differences are noteworthy. Alberta and the Atlantic region offer consistently higher marks to these key players while BC residents are more critical (except for port authorities).

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Quebecers also tend to give below average ratings, except to the shipping industry and the International Maritime Organization (IMO). And we see a split verdict in the three biggest provinces' assessment of applicable provincial government performances on marine safety. (The regional scores are highlighted in the table below.)

Canadians' job ratings of key players on marine safety (Net scores = "good job" minus "bad job")							
	Canada	BC	AB	SK/MB	ON	QC	ATL
The shipping industry	+38	+32	+47	+27	+39	+38	+44
Port and harbour authorities	+52	+56	+59	+50	+50	+46	+62
Provincial governments	+7	+2	+20	+21	+3	+1	+23
The federal government overall	+12	+4	+21	+17	+13	+5	+28
Specific federal departments and agencies	+34	+21	+44	+30	+37	+29	+43
The International Maritime Organization	+28	+22	+32	+26	+26	+33	+32

Safety Protocols

The survey also asked Canadians what kind of impact they think two specific policies have on shipping safety in Canadian waters:

- **Response organizations** – A plurality of 44 per cent of Canadians said response organizations increase shipping safety, while 22 per cent said “no impact” and only 4 per cent thought these might decrease safety. Thirty per cent were unsure.
- **Marine pilotage** -- Canadians are more convinced that marine pilotage increases shipping safety, with a full majority taking this view (63%).

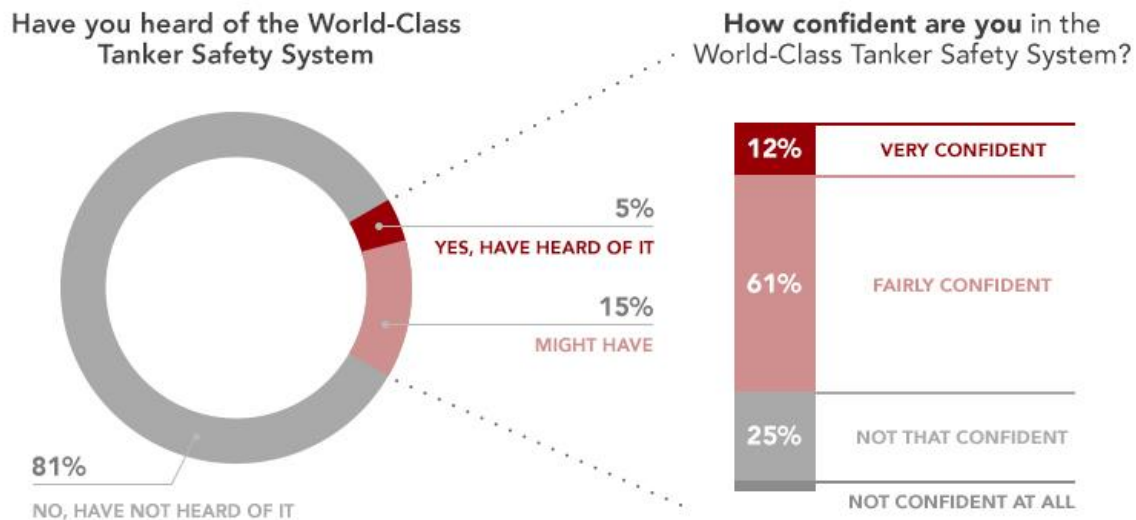
World-Class Tanker Safety System

Finally, Canadians were canvassed on the “[World-Class Tanker Safety System](#)” (WCTSS), a federal government initiative; its goal is to enhance Canada's marine safety regime. At this point, just five per

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cent of Canadians say they have heard of the WCTSS while another 15 per cent say they "might have". A total of four-in-five (81%), therefore, have not heard of the system.



For more information on this survey and to see the complete questionnaire and detailed tabular results, please visit www.angusreid.org.

*The **Angus Reid Institute (ARI)** was founded in October 2014 by pollster and sociologist, Dr. Angus Reid. ARI is a national, not-for-profit, non-partisan public opinion research organization established to advance education by commissioning, conducting and disseminating to the public accessible and impartial statistical data, research and policy analysis on economics, political science, philanthropy, public administration, domestic and international affairs and other socio-economic issues of importance to Canada and its world.*

***Clear Seas Centre for Responsible Marine Shipping** is an independent, not-for-profit organization that provides impartial and evidence-based research to inform the public and policy makers about marine shipping in Canada, including risks, mitigation measures and best practices for safe and sustainable marine shipping. Clear Seas' vision for safe and sustainable shipping is holistic, encompassing environmental, social and economic impacts of the shipping industry. Based in Vancouver, Canada, Clear Seas was officially launched in 2014 to be a leading source of independent, fact-based information on safe and sustainable marine shipping in Canada.*

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Relevant summary tables follow. For comprehensive tables showing results by region, age, gender and other demographics, [click here](#).

Thinking generally about shipping in Canada, is your own impression that its importance has been growing, shrinking, or staying about the same over the past 15 or 20 years?			
(weighted sample sizes)	Total (2290)	Maritime Identification	
		Strongly/A fair amount (1330)	A bit/Not at all (960)
Growing importance	43%	51%	30%
Shrinking importance	10%	7%	15%
Staying about the same	47%	42%	54%

What is your overall view of each of the following? (summary of “support”)			
(weighted sample sizes)	Total (2290)	View on the safety of shipping petroleum	
		Confident (1382)	Worried (908)
Not allowing crude oil shipments along the north coast of BC	53%	48%	60%
Not allowing ships to use heavy oil for fuel in Arctic waters	62%	60%	65%
An increase in oil tanker traffic in the Bay of Fundy	43%	58%	19%
An increase in oil tanker traffic around the south coast of BC	45%	62%	20%
Shipping LNG (liquefied natural gas) in Canadian waters	58%	72%	36%
Shipping oil through the Great Lakes and St. Lawrence Seaway	51%	67%	28%

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