

In post-COVID world Canadians look for shipping industry to rebuild economy but balance environmental protection

Favourability of marine shipping in Canada remains high, four-in-five view industry positively

November 30, 2020 – The invisible strings that tie the globe together have been more evident this year as the COVID-19 pandemic has strained trading networks and challenged the transport of goods. Indeed, seven-in-ten Canadians say they've learned more about the supply chain this year as they have dealt with shortages of medicines, personal protective equipment, hand sanitizer, and even household goods like toilet paper.

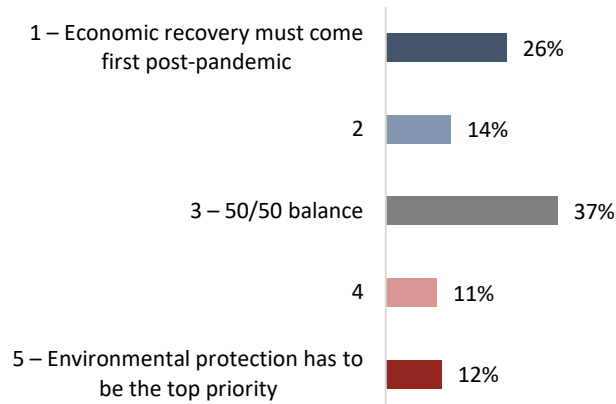
A new study from the Angus Reid Institute, in partnership with [Clear Seas Centre for Responsible Marine Shipping](#), casts its focus into the future and finds Canadians looking for the industry to play a major role in the post-pandemic economic recovery, while also continuing to make strides in environmental protection. Two-in-five Canadians say the economic side of this equation is paramount, while one-quarter (23%) say environmental aspects are key. In the middle are the largest number – 37 per cent – who feel that balancing both is the best way to proceed.

The shipping industry heads into another year of likely challenges with positive ratings from most Canadians. Building on what now is a five-year trend, four-in-five residents say they have a favourable view of marine shipping. Further, more than half (54%) say that the industry's importance has grown over the past 15 – 20 years in their estimation.

More Key Findings:

- An overwhelming majority of Canadians (92%) continue to view marine shipping as either “very safe” (25%) or “generally safe” (67%).
- However, confidence in shipping of petroleum products appears to be declining with 45 per cent of Canadians voicing concern – up six points from 2018.

Post-pandemic recovery in the marine shipping industry: What should take priority? (All respondents, n=2,277)



METHODOLOGY:

The Angus Reid Institute conducted an online survey from October 5 – 9, 2020 among a representative randomized sample of 2,277 Canadian adults who are members of [Angus Reid Forum](#). For comparison purposes only, a probability sample of this size would carry a margin of error of +/- 2.1 percentage points, 19 times out of 20. Discrepancies in or between totals are due to rounding. The survey was self-commissioned and paid for by ARI. Detailed tables are found at the end of this release.

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- Younger Canadians lean more heavily toward prioritizing environmental protection than economic growth when it comes to marine shipping. Canadians 35 years of age and older prefer an economic focus.
- When asked to estimate the proportion of goods in their day-to-day lives that rely on marine shipping, half of Canadians underestimate the total.
- Most Canadians remain confident in the rules and regulations governing marine shipping safety in Canada today. Today, seven-in-ten say this, a number that has stayed relatively consistent since 2016

About the Angus Reid Institute

*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 foundation 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.*

INDEX:

Part 1: General impressions of marine shipping in Canada

- **Four-in-five hold a positive view of the industry**
- **Perceived importance remains fairly consistent**
- **Awareness of the industry's scope**

Part 2: Perceptions of marine shipping safety

- **Overwhelming majority of Canadians believe shipping to be safe**
- **Spills top the list of safety concerns**
- **Canadians near divided on safety of shipping oil and gas in domestic waters**
 - **Varying levels of support case-by-case**
- **Economic contribution vs. environmental risk**
 - **Impact of COVID-19**

Part 3: Assessments of shipping regulation and oversight

- **High marks for regulators but half say still more could be done**

Part 4: Shipping Confidence Index

- **Who belongs to each group?**
- **Notes on methodology**

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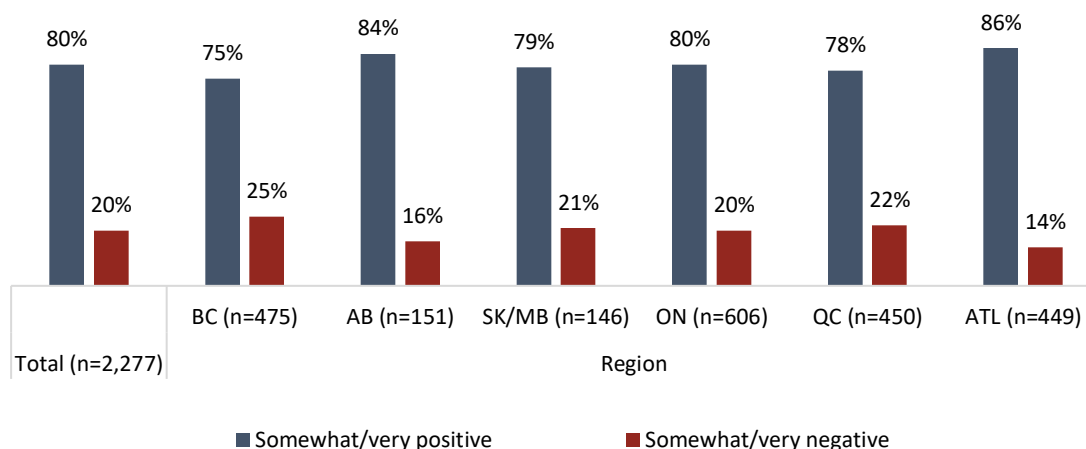
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Part 1: General impressions of marine shipping in Canada

Four-in-five hold a positive view of the industry

Canada's supply chains have been put under the microscope during the COVID-19 pandemic. As borders have been closed and travel restricted, reliable transportation of goods has been paramount in maintaining stability for the country. Marine shipping plays a key factor in upholding this transmission, and Canadians across the country evidently hold positive views about the industry. As has been the case [in the past](#), residents of British Columbia view shipping slightly less favourably than the rest of Canada, but three-quarters (75%) view it positively nonetheless.

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



Perceived importance remains fairly consistent

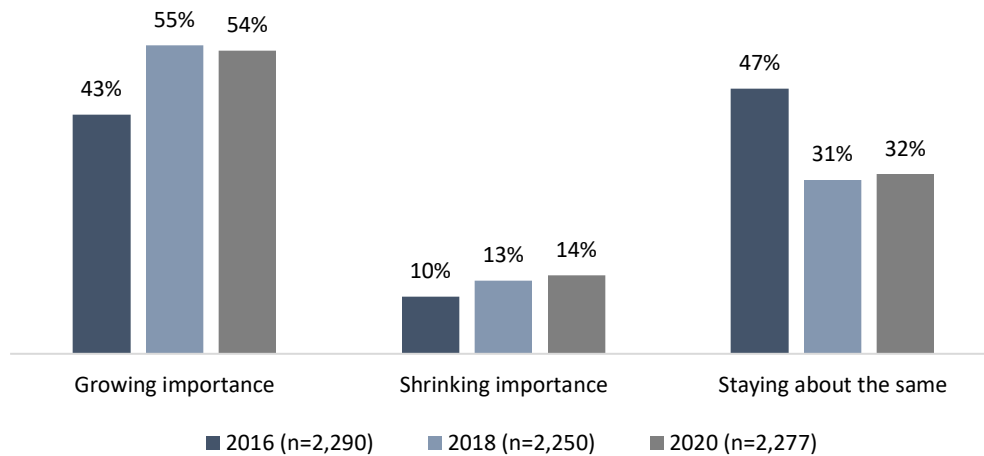
Building on a trend [established in 2018](#) by the Angus Reid Institute, fully half of Canadians perceive the industry as having grown in importance over the past 15 to 20 years. One-in-three (32%) say its significance has been staying about the same, leaving a small minority of just 14 per cent who believe the industry's role in Canada is diminishing.

For reference, data from the United Nations Conference on Trade and Development indicate that global seaborne trade volumes increased by [2.7 per cent](#) in [2018](#) (the most recent data currently available). Although this same report projected 3.4 per cent annual average industry growth from 2019 to 2014, it is worth noting that, globally, container ship arrivals fell below the 2019 levels in [mid-March](#) due to the pandemic but have since recovered, and 2020 shipments of bulk commodities like grain have [hit record highs](#).

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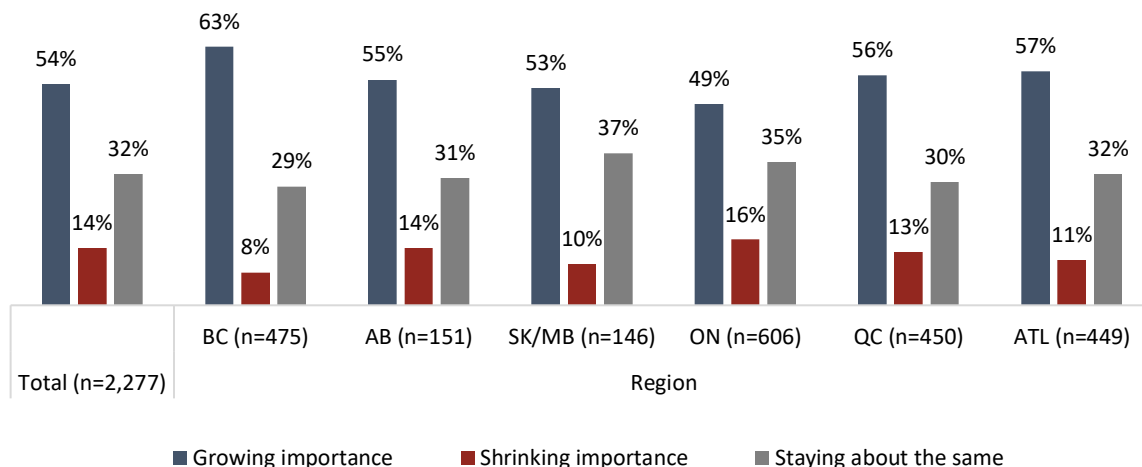
Has the importance of shipping in Canada been growing or shrinking over the past 15 - 20 years?*



**see questionnaire for full question text*

Perceptions of whether marine shipping had been growing or shrinking in importance in Canada vary somewhat between regions of the country. Nearly two-thirds of B.C. residents (63%) believe its importance has been growing, while half (49%) of those in Ontario feel the same.

Has the importance of shipping in Canada been growing or shrinking over the past 15 - 20 years?*



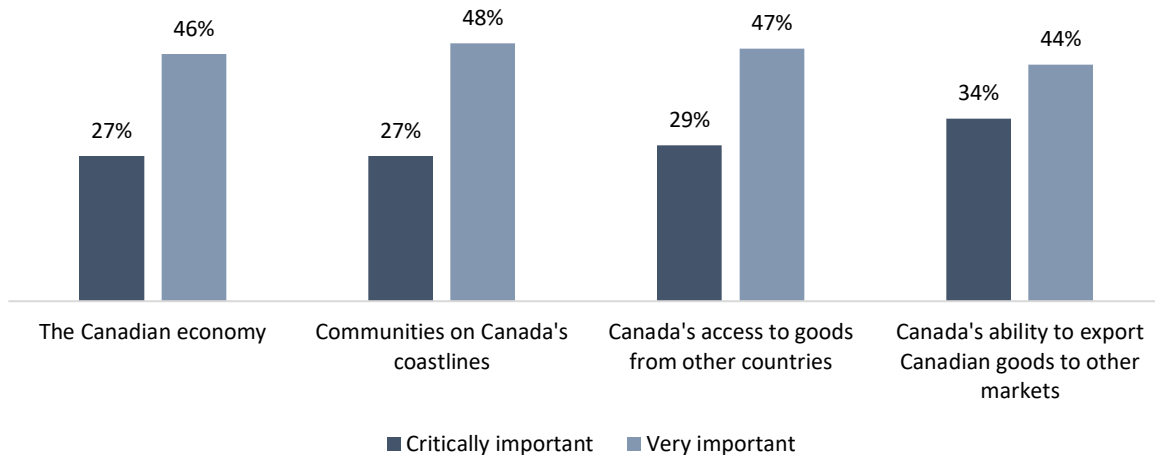
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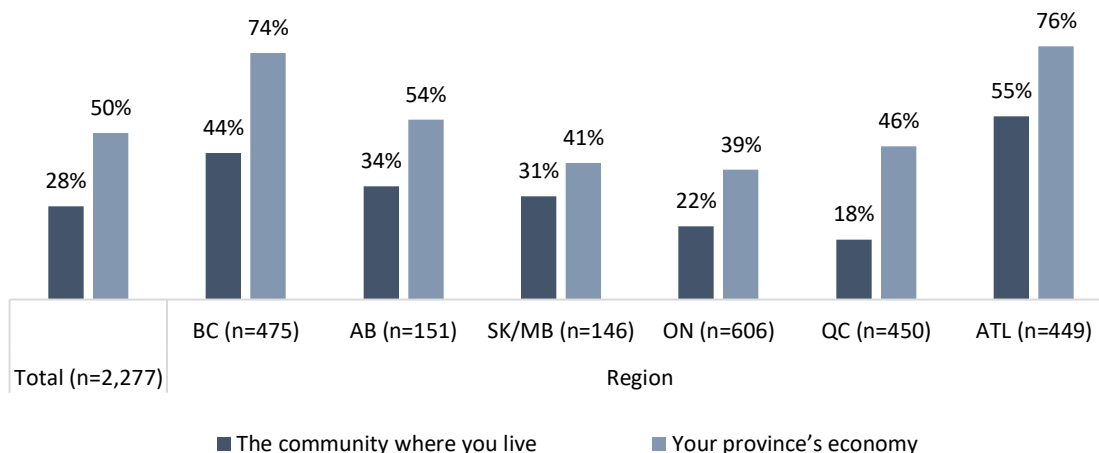
Canada's shipping industry is seen as important for a variety of reasons, with clear majorities agreeing that it is vital for the country's economy, coastal communities, and access to foreign trade. It is seen as most critical for allowing Canada to export goods abroad.

**How important do you think the shipping industry is for each of the following?
(All respondents, n=2,277)**



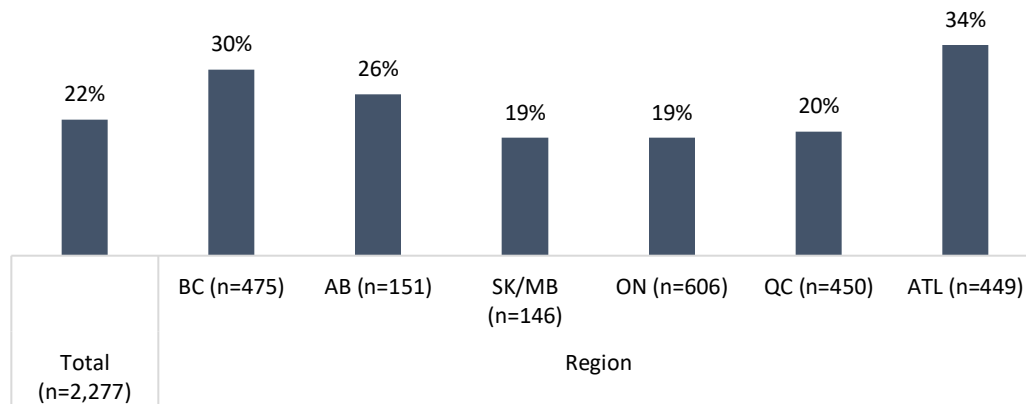
Looking at a more local level, just under three-in-ten (28%) say that shipping is important to their own community, while half believe it is important to their province's economy. These figures vary widely from place to place, with three-quarters of those in B.C and Atlantic Canada saying it is vital for their provincial economies. By contrast, just four-in-ten (39%) Ontario residents said the same.

**Shifting the focus closer to home now, how important do you think the shipping industry is for each of the following?
(Percentage saying "very" or "critically important")**



In considering the importance of shipping to their personal day-to-day lives, respondents tended to see less relevance. Just one-in-five (22%) think it is very or critically important, though this proportion rises in coastal regions:

Shifting the focus closer to home now, how important do you think the shipping industry is for your own day-to-day life? (Percentage saying "very" or "critically important")



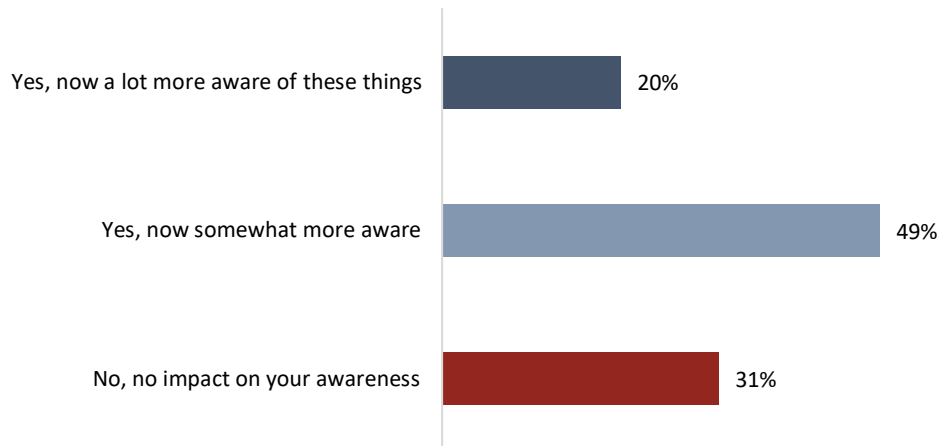
Awareness of the industry's scope

While shipping plays a major role in global commerce and economies across the globe, it is not something to which Canadians pay close attention. Pandemic-induced supply chain disruptions, however, have in some cases resulted in wild [price swings](#) and [shortages](#) of a goods ranging from toilet paper to [medicine](#). This has reminded consumers of the systems like the shipping industry that operate in the background to make a modern lifestyle possible. Seven-in-ten (69%) respondents said that COVID-19 has increased their awareness of how goods are shipped around the world.

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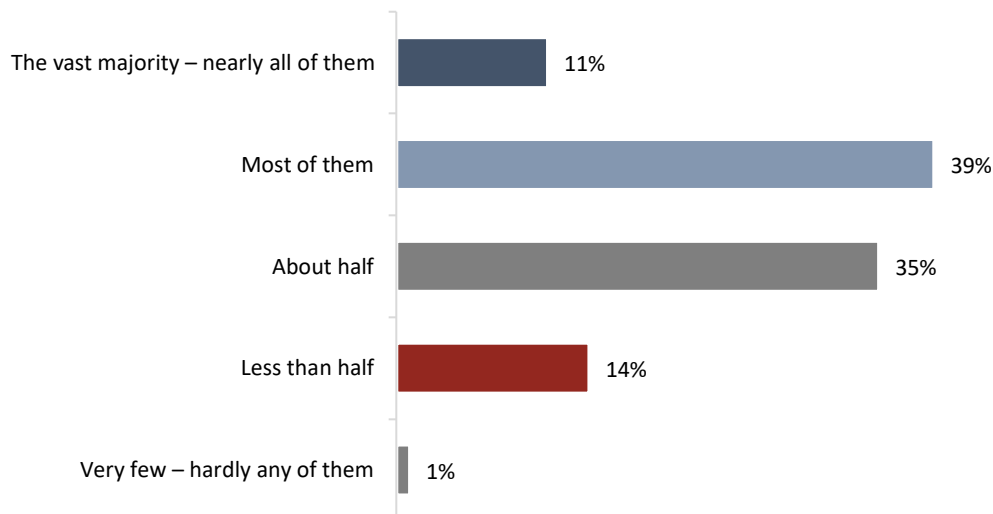
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**Has the COVID-19 pandemic had any impact on your own overall awareness of how products move around the world, including marine shipping?
(All respondents, n=2,277)**



While many say they have learned more about supply chains, knowledge of marine shipping still seems to lag. When asked to estimate the proportion of their day-to-day products that was transported by ship, half say that approximately half or less of the daily items they use had been shipped by sea. This would appear to be an underestimate, given that over 80 per cent of goods traded globally are moved via marine shipping at some point.

Of all of the products you use on a daily basis, what proportion of these items would you estimate were transported by ship before they got to you?

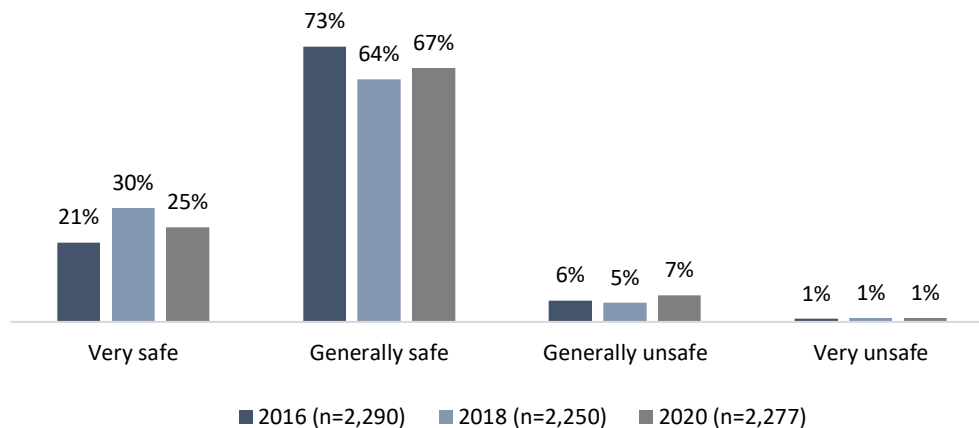


Part 2: Perceptions of marine shipping safety

Overwhelming majority of Canadians believe shipping to be safe

Canadians continue to offer praise of the shipping industry when it comes to safety. Over the past five years the proportion saying they feel operations are generally safe has exceeded nine-in-ten:

Generally speaking, what kind of overall safety rating would you give to shipping in Canadian waters?



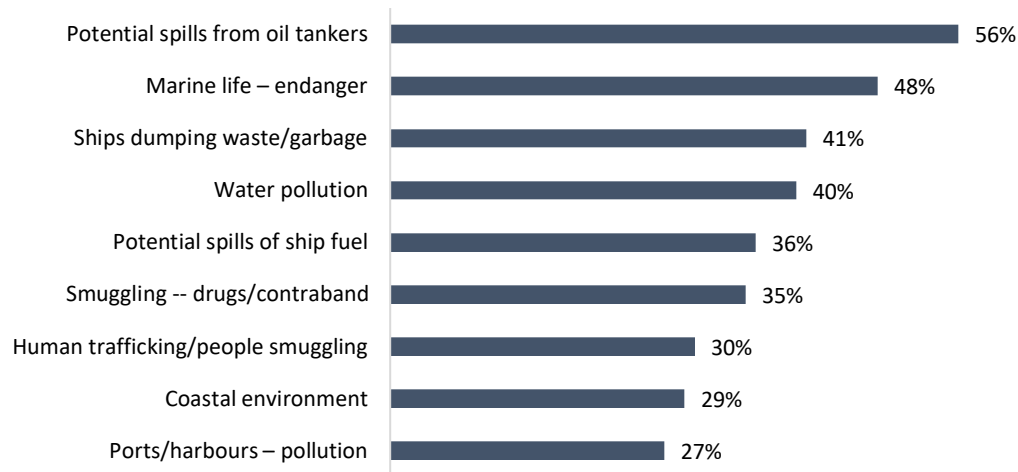
Spills top the list of safety concerns

When prompted to consider the possible safety issues that cause them the most concern, spills from oil tankers are chosen by more than half of respondents. Dangers to marine life, pollution and waste management are also top concerns.

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Types of potential safety issues and risks that are most concerning about the shipping industry and shipping in Canadian waters (Only responses with 25% or more shown)

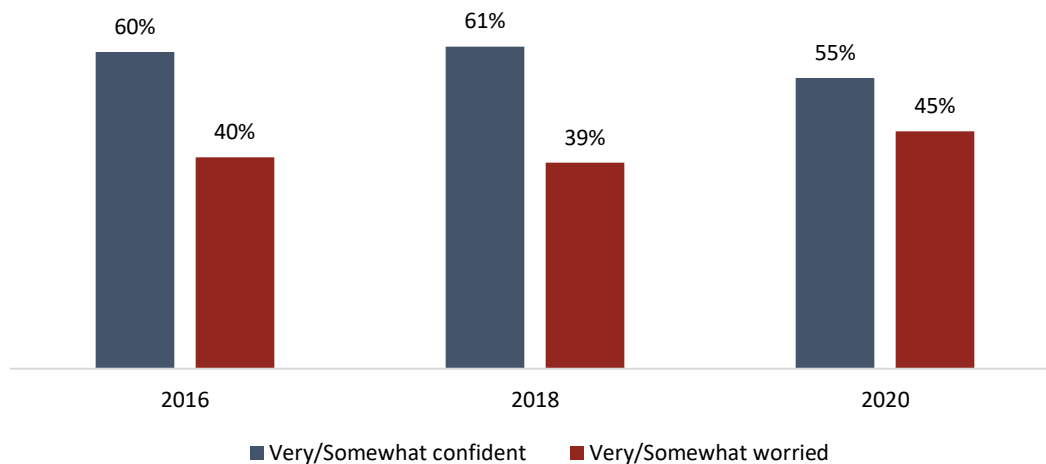


Concern for certain issues varies by age. On the issue of greenhouse gas emissions, for instance, 18- to 34-year-olds are twice as likely as older age cohorts to list it as a more serious risk ([see detailed tables](#)).

Canadians near divided on safety of shipping oil and gas in domestic waters

While it's still the case that just over half of Canadians are more confident than worried about the safety of oil and gas shipping, those who are concerned (45%) are a significant minority. The percentage of those concerned about shipping petroleum products in Canadian waters is up six points from 2018.

Overall, would you describe yourself as confident or worried about the safety of marine shipping of petroleum products in Canadian waters?

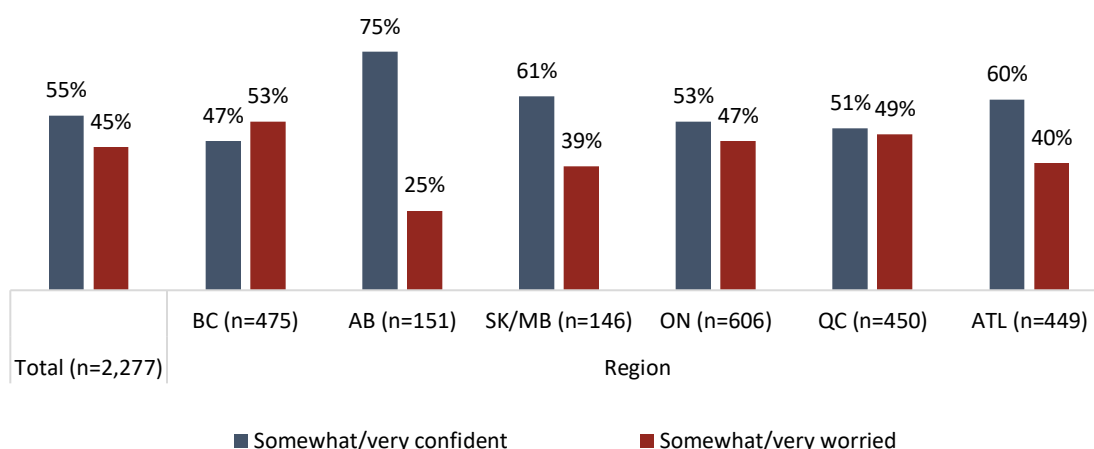


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Regionally, oil-rich Alberta stands out as having the most confidence in the country with respect to shipping oil and gas products. Here, three times as many Albertans express confidence (75%) compared to worry (25%). The confidence of Atlantic Canadians is of particular importance as roughly 85 per cent of oil tanker movements in Canada's waters are [along the Atlantic coast](#). Three-in-five Atlantic Canadians (60%) express confidence in the industry to move these products safely, while two-in-five (40%) are concerned:

Overall, would you describe yourself as confident or worried about the safety of marine shipping of petroleum products in Canadian waters?



Varying levels of support case-by-case

The stark contrasts in opinion between the different regions of Canada are evident when Canadians are asked to assess a number of different shipping related proposals. For example, Alberta and Saskatchewan residents are overwhelmingly in favour of shipping liquefied natural gas products in Canadian waters, while Quebec residents lean toward opposition. A similar split is noted when assessing an increase in oil tanker traffic off the coast of B.C. Just 39 per cent of British Columbians would support such a policy, while nearly twice as many Albertans (75%) are in favour of it:

Support for each of the following:							
	Total (n=2,277)	Region					
		BC (n=475)	AB (n=151)	SK/MB (n=146)	ON (n=606)	QC (n=450)	ATL (n=449)
Not allowing ships to use or carry heavy fuel oil in Arctic waters	59%	62%	37%	50%	60%	69%	57%

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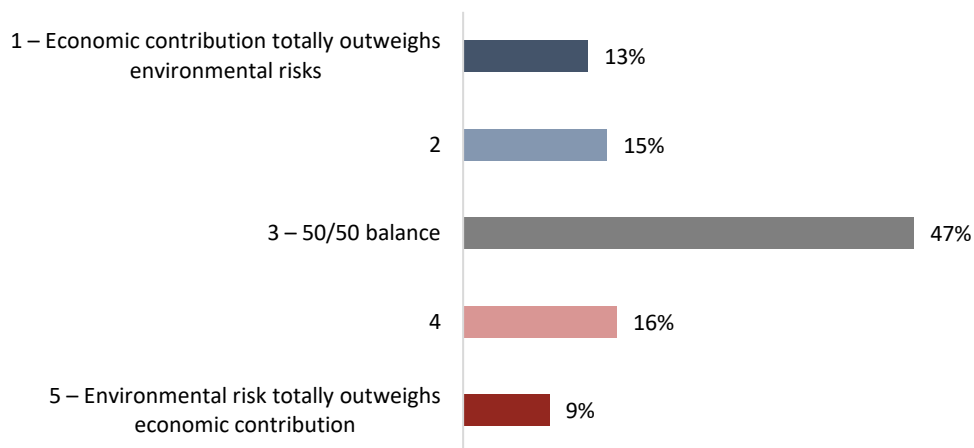
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Shipping LNG (liquefied natural gas) in Canadian waters	54%	55%	78%	71%	52%	39%	63%
Not allowing crude oil shipments along the north coast of BC	50%	53%	31%	35%	51%	62%	42%
Shipping oil through the Great Lakes and St. Lawrence Seaway	44%	44%	70%	55%	40%	32%	55%
An increase in oil tanker traffic around the south coast of BC	42%	39%	75%	57%	36%	31%	50%
An increase in oil tanker traffic in the Bay of Fundy	39%	40%	69%	56%	32%	28%	44%

Economic contribution vs. environmental risk

When weighing marine shipping's economic benefits against its risks to the environment, most see the need for at least some balance between the two concerns. Half of Canadians (47%) say each priority should be considered equally, while just 22 per cent say that one aspect entirely outweighs the significance of the other: 13 per cent favour only the economic contribution argument, while nine per cent see environmental risk as all-important.

How Canadians weigh the economic contribution of marine shipping against potential environmental risks



While this does not indicate a massive change in how Canadians evaluate these competing concerns, there do seem to be two gradual shifts since 2016. First, the environmental aspect of the equation is rising in importance: 25 per cent see it as at least somewhat more significant now, a rise of 11 points from the 14 per cent who felt that way in 2016 (when more than twice as many leaned towards the economic side). This corresponds to a [rising prioritization](#) of climate change in Canadians' top issues ranking over the same period.

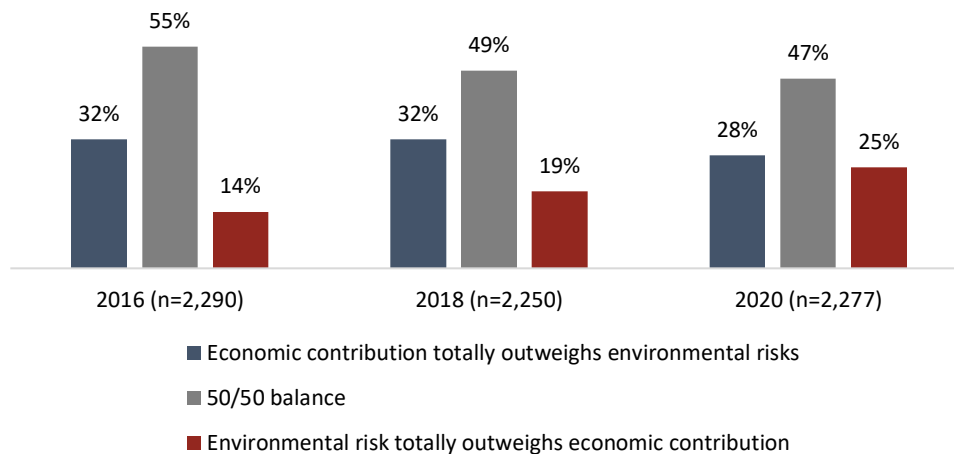
Second, this debate is perhaps more polarizing than it was, with increases in both the share of respondents who feel economic benefits should entirely outweigh environmental risks, and the share who

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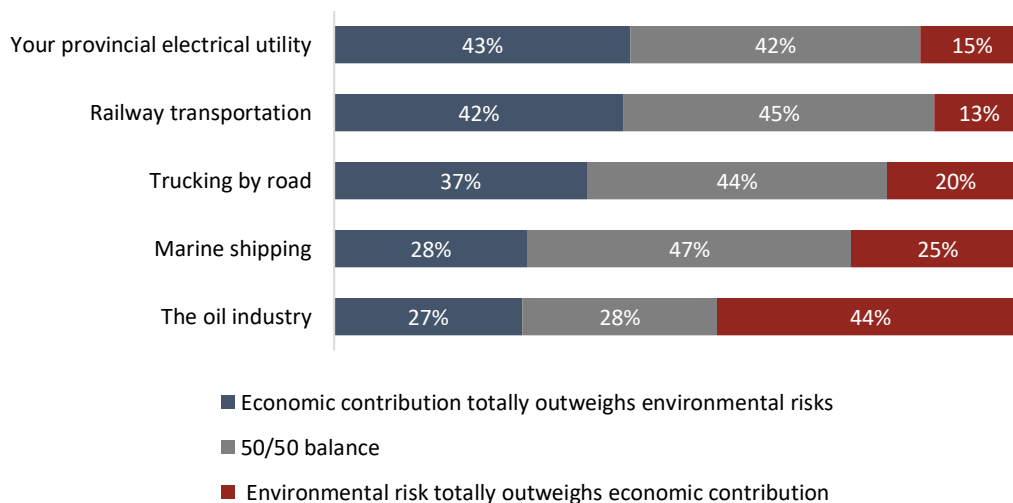
believe the exact opposite. Support for an even weighting dropped from 55 per cent in 2016 to 47 per cent now.

How Canadians weigh the economic contribution of marine shipping against potential environmental risks



It provides useful context to compare this to look at how this same trade-off is viewed in other industries. Notably, Canadians are more likely assign greater weight to the oil industry's environmental risk than its economic contribution, the only industry for which is the case:

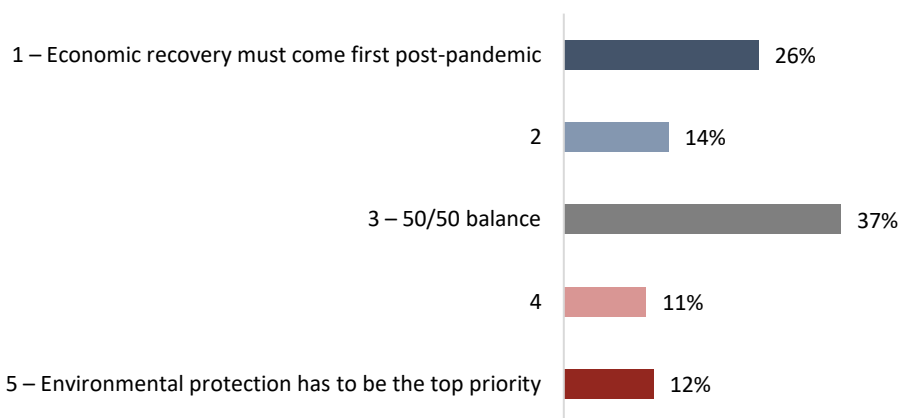
How Canadians weigh each industry's economic contributions and potential environmental risks



Impact of COVID-19

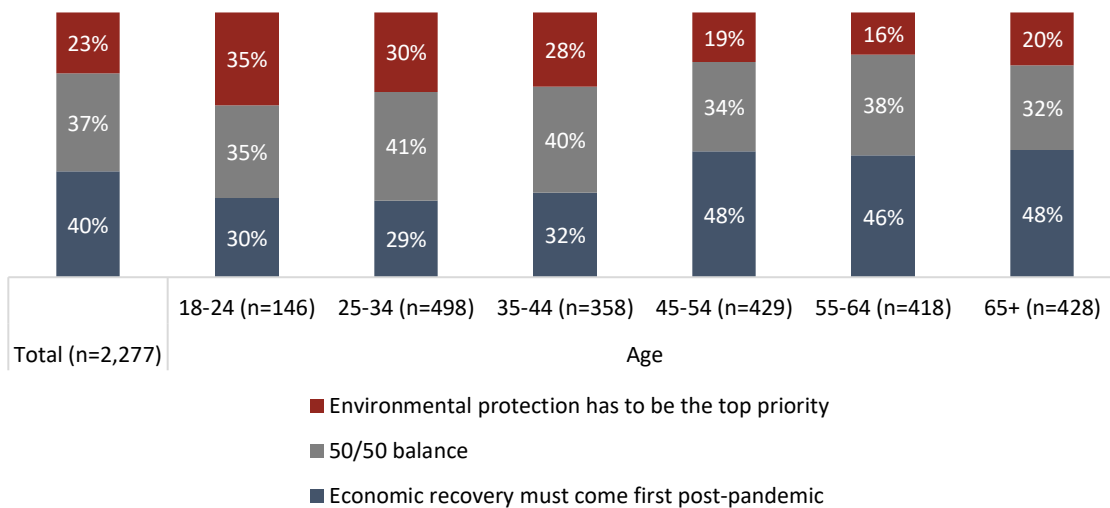
Framing the trade-off between economy and environment in the context of recovery from the pandemic changes the outlook for some. The primary shift in opinion is toward economic priority in this case. When the world begins to recover from the pandemic and the damage it has wrought, the economic aspects of shipping outweigh the environmental balance by nearly a two-to-one ratio, as seen in the graph below:

**Post-pandemic recovery in the marine shipping industry: What should take priority?
(All respondents, n=2,277)**



Not all of the age cohorts are equally persuaded, however. Younger Canadians show less tendency to think that the pandemic-induced recession means that economic concerns must be prioritized over ecological ones for shipping. Those who are 45 or older are far more likely to prioritize the economy than the environment in this context.

**Post-pandemic recovery in the marine shipping industry: What should take priority?
(All respondents, n=2,277)**

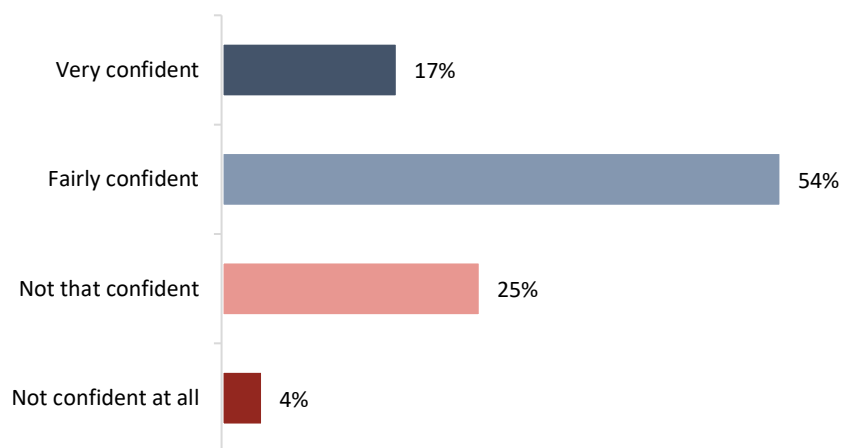


Part 3: Assessments of shipping regulation and oversight

High marks for regulators but half say still more could be done

Most Canadians (71%) have some confidence in the rules and regulations around safe shipping in the country's waters, though this does leave a sizable minority (29%) who have little to no confidence in this.

How much confidence do you have in the overall safety rules and regulations covering marine shipping in Canadian waters today?

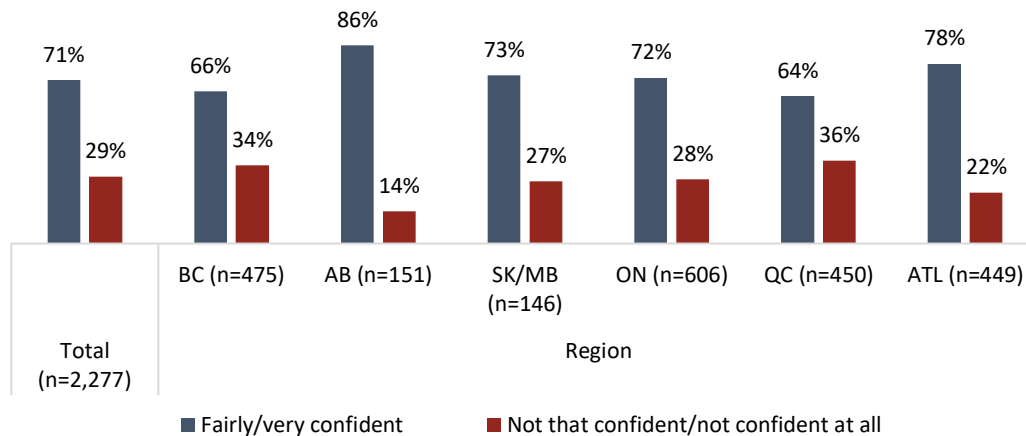


Residents of B.C. and Ontario are the most likely to be skeptical of marine shipping's safety regulations, with just over a third (34% and 36% respectively) saying they are not that confident or not confident at all in them. On the other hand, Albertans are half as likely as the national average to be worried, with just 14% expressing a lack of confidence in the safety rules.

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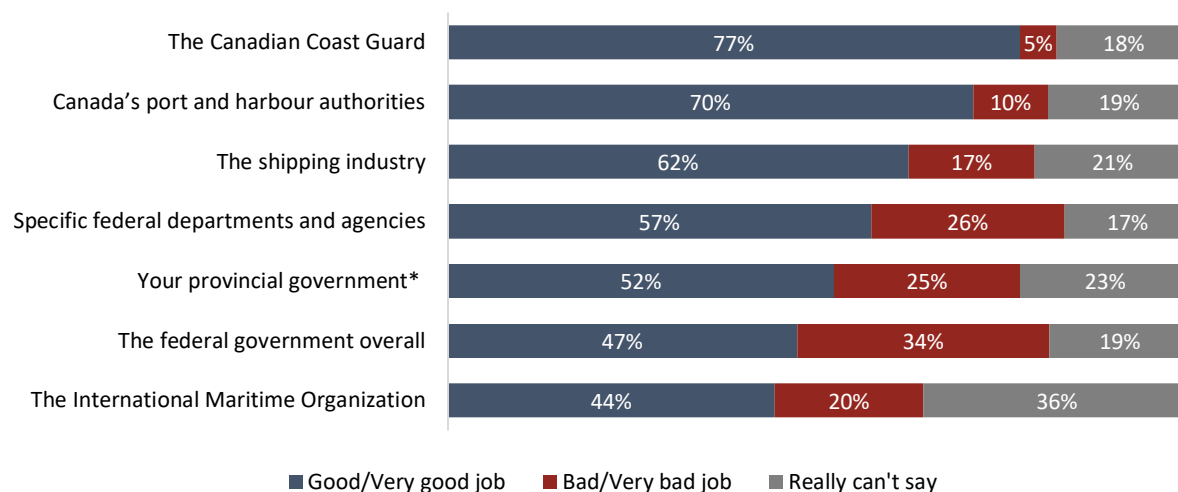
How much confidence do you have in the overall safety rules and regulations covering marine shipping in Canadian waters today?



Asked about the performance of a variety of organizations that are involved in the safety of marine shipping, responses tend to be more positive than negative, though to widely varying degrees for different organizations, and with a considerable degree of uncertainty for many.

The Canadian Coast Guard is seen as doing a good job in contributing to shipping safety by three-quarters (77%) of Canadians, with just five per cent saying they are doing poorly. Conversely, one-in-three (34%) disapprove of the federal government’s handling of shipping safety, though they are still outnumbered by the 47 per cent who think it is doing a good job. Perceptions of the shipping industry itself are somewhere in between, with three-in-five (62%) applauding it and 17 per cent dissatisfied with its contributions to safety.

**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?
(All respondents, n=2,277)**



*Response option shown for respondents in B.C., ON, QC, ATL, note residents in AB, SK, and MB shown "provincial governments"

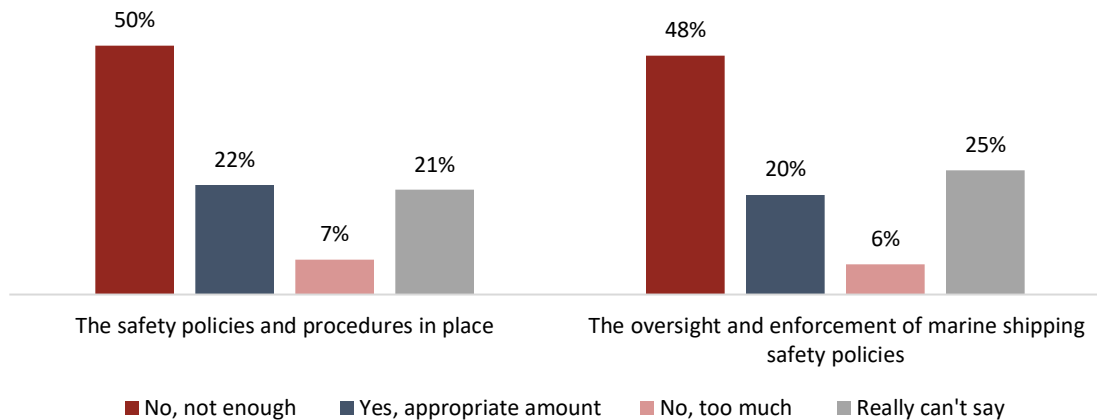
Respondents were also asked about two specific regulations: **Response Organizations**; the requirement that shipping operators have a contract with an organization to respond to oil spills, and **Marine Pilotage**; a policy that requires ships operating in Canadian waters to use licensed marine pilots with knowledge of the local waterway to guide them into and out of port. For each, at least two-in-three perceive the policy to be improving shipping safety ([see detailed tables](#)).

Despite these favourable impressions, half of Canadians think that the government is not putting enough effort into the safety procedures and policies that are in place, and almost as many (48%) believe the government needs to devote more attention to oversight and enforcement of these policies. In each case, less than 10 per cent said that the government is doing too much.

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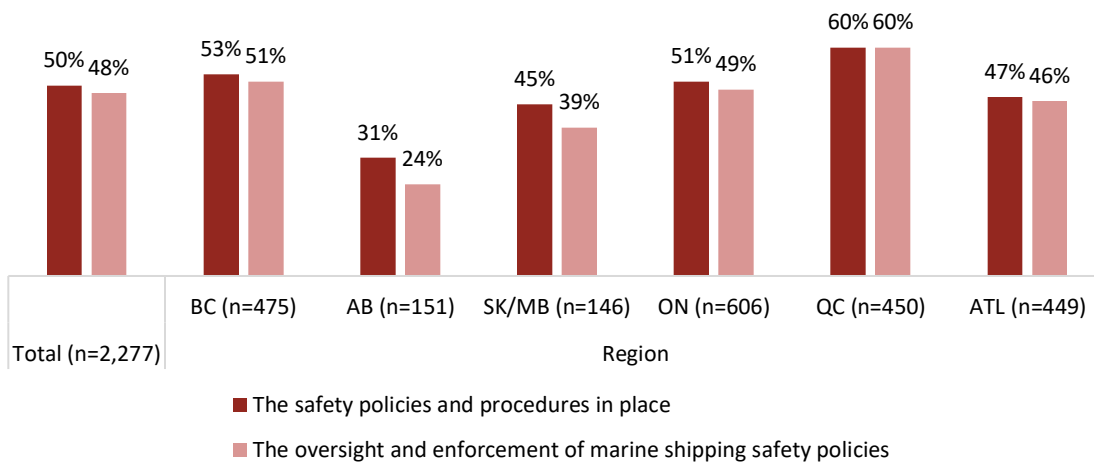
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Do you think this area of marine shipping safety receives the appropriate amount of government attention in terms of...?



Here, as with responses to shipping oil and LNG through certain Canadian waterways, residents in Quebec, Ontario, and B.C. express the most concern with existing safety policies and their enforcement:

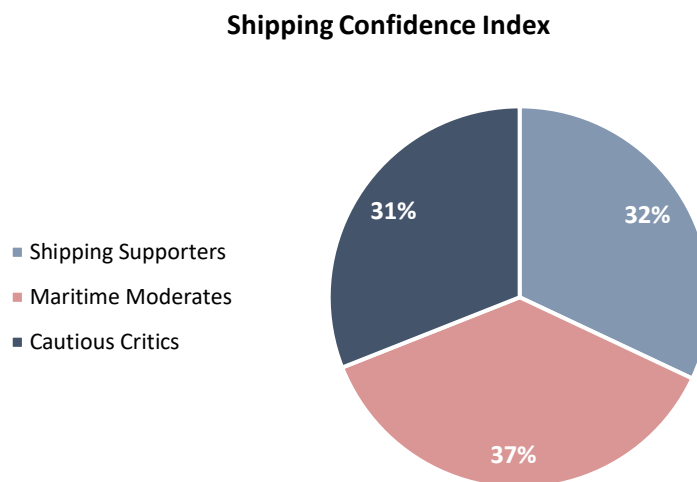
Percentage that say the following areas of marine shipping safety do not receive enough government attention



Part 4: Shipping Confidence Index

In order to better understand the numerous viewpoints on marine shipping in Canada, researchers at the Angus Reid Institute created an index based on variables associated with overall perceptions of the industry, and its role in the economy, international trade, and environmental protection. Additional methodology may be found at the end of this report.

The Shipping Confidence Index is comprised of three groups: Shipping Supporters, Maritime Moderates, and Cautious Critics.



Shipping Supporters (32%) perceive the shipping industry as “critically” or “very” important for the federal economy as well as their own provincial economy, and international trade. This group tends to assign higher priority to the economic considerations of marine shipping over potential environmental risks.

Maritime Moderates (37%), as their name suggests, represent an ideological centre between the other two groups. Although mostly confident about overall safety and regulation, Moderates are divided on other aspects related to marine shipping in Canada, including assessments of shipping petroleum in Canadian waters and Canada’s image as a maritime or sea-faring nation.

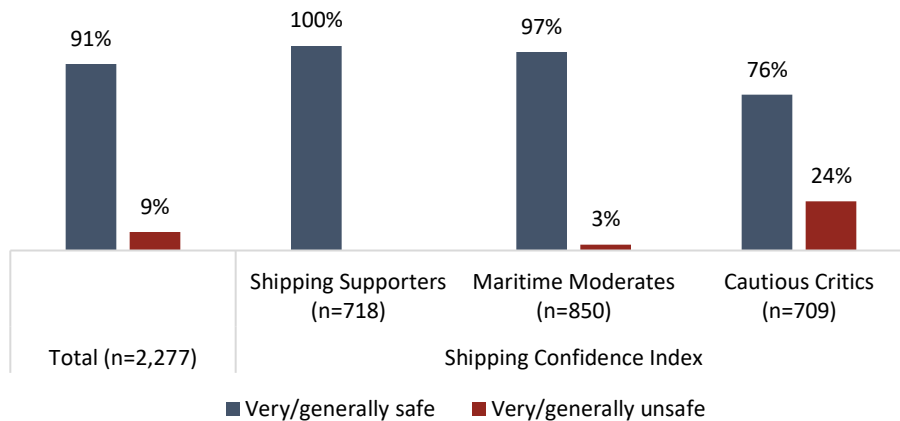
Of the three groups, **Cautious Critics** (31%) express the highest rates of skepticism when it comes to the importance of the industry and its overall safety. This group is defined by high levels of concern related to marine transport of petroleum in domestic waters and not enough government attention to safety and enforcement.

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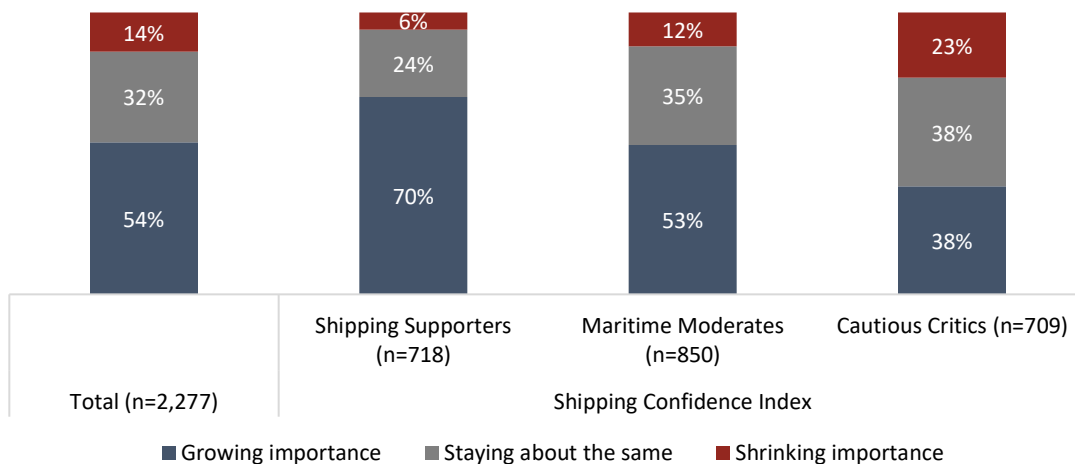
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These differences are illustrated in the graphs below:

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:



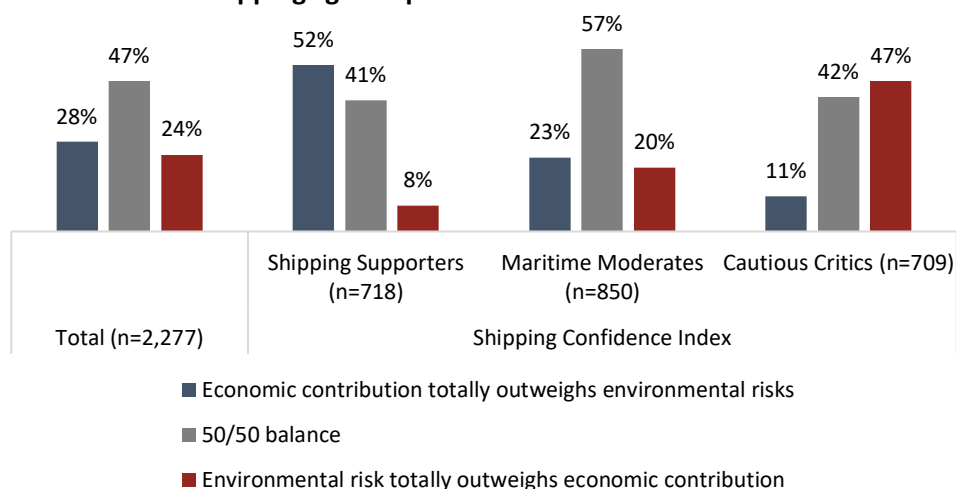
Thinking generally about shipping in Canada, is your own impression that its importance has been growing or shrinking or staying about the same over the past 15 or 20 years or so?



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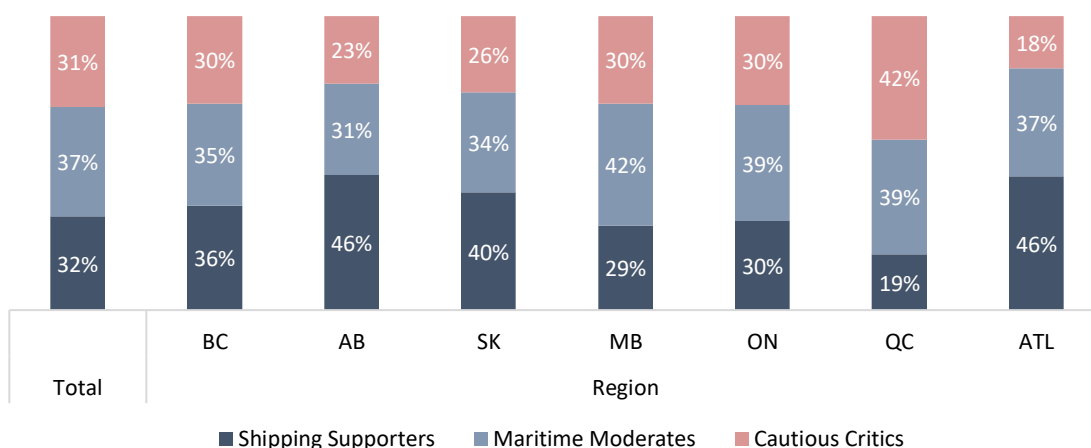
How Canadians weigh the economic contribution of marine shipping against potential environmental risks



Who belongs to each group?

Looking at the Index regionally, similar trends as were highlighted previously in this report emerge. Atlantic Canada and Alberta are home to the highest proportions of Shipping Supporters, where they comprise nearly half of residents. In contrast, Quebec residents are most likely to belong to the Cautious Critics group:

Shipping Confidence Index by region

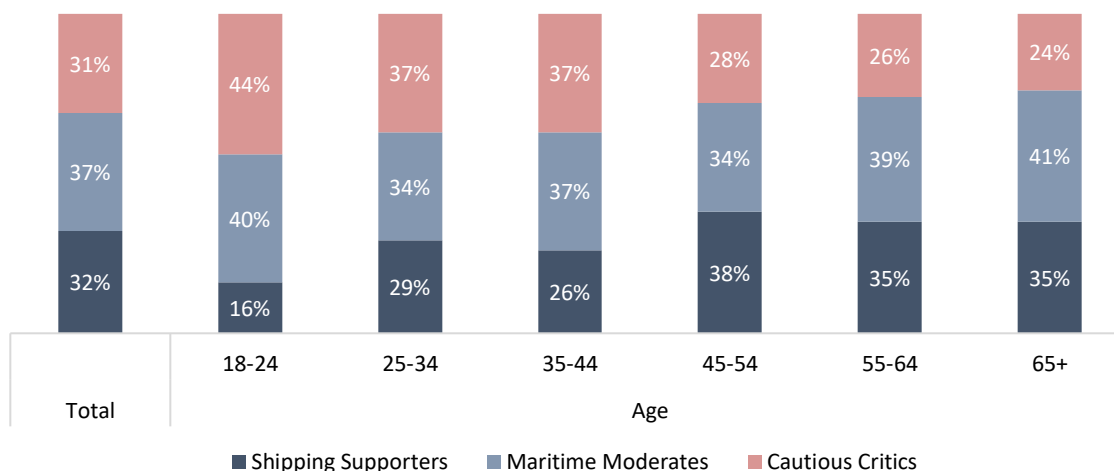


As discussed, the Index groups are largely defined by where they place their priority for the marine shipping industry: economic contribution versus environmental risk. The distribution of Canadians across the Index by age therefore reflects generational differences on this subject, with the proportion of Cautious Critics decreasing with age, and vice versa for Shipping Supporters:

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Shipping Confidence Index by age

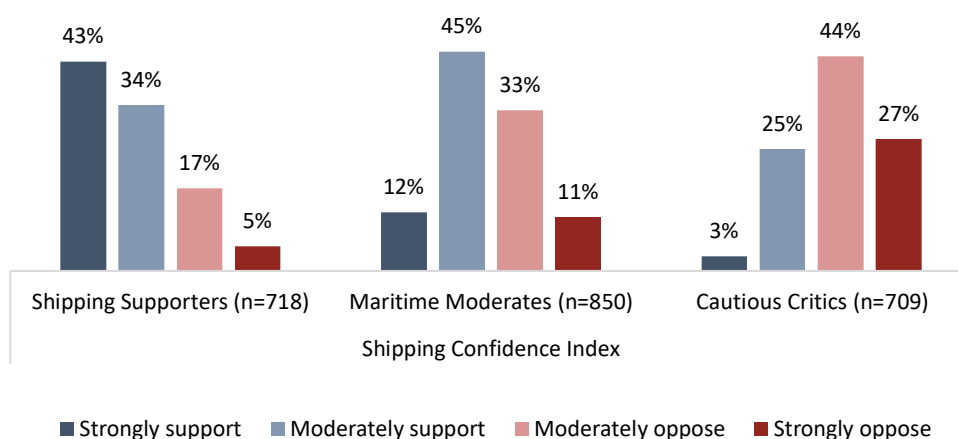


The uncertain centre

The Maritime Moderates, a slightly larger group than either of the others, indicate that for many Canadians marine shipping is not a core issue they think about much. To name just one example: when asked if the government gives safe shipping policies the right level of attention, they are the likeliest to say they are unsure.

They also show a propensity to take a middling stance on related issues. For instance, they are nearly split on whether to allow liquefied natural gas to be shipped through Canadian waters (56% support it, 44% oppose it), while each of the other segments are less divided.

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



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It is also worth noting that the Moderates truly live up to their name, in the sense that more than three-quarters of them (78%) say their support *or* opposition is “moderate” rather than “strong”. This pattern was repeated across many of the questions. In a similar vein, they are less likely than Shipping Supporters to associate shipping with positive words such as “essential” but also less likely than Cautious Critics to associate it with negative words such as “polluting”.

Taking all of this into account, it seems that the Maritime Moderates, representing a sizable minority of Canadians, may be more persuadable when it comes to their ideas and opinions about marine shipping. As noted earlier, a majority (57%) see an even balance between the economic contributions of shipping and its environmental harm. They are the group most likely to therefore be open to a more entrenched view one way or the other.

Notes on Methodology

The Shipping Confidence Index is based on responses to six questions, comprising ten different variables. Respondents were scored on questions related to

- overall perceptions of marine shipping;
- the importance of the industry to the national economy and for international trade;
- the importance of the industry to their own provincial economy; and
- assessments of ship safety while operating in Canadian waters

Respondents were assigned points for positive views and omitted or deducted points for negative views so researchers could group them based on similar responses. Respondents ranged from a minimum score of -22 to a maximum score of 25, which resulted in three groupings of relatively equal size.

For detailed results by age, gender, region, education, and other demographics, [click here](#).

For detailed results by finer age groups, [click here](#).

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