

Supply chain crunch provides new perspective for Canadians on marine shipping

Four-in-five say global issues have made them more aware of how goods move around the world

December 13, 2022 – A stubborn feature of the pandemic era has been a relentless supply chain crunch that has affected everything from new cars to [children's medicine](#).

New data from the non-profit Angus Reid Institute, in partnership with [Clear Seas Centre for Responsible Marine Shipping](#), finds a growing proportion of Canadians saying marine shipping is “very” or “critically” important to their day-to-day-life – and a shrinking proportion who believe it not to be important at all.

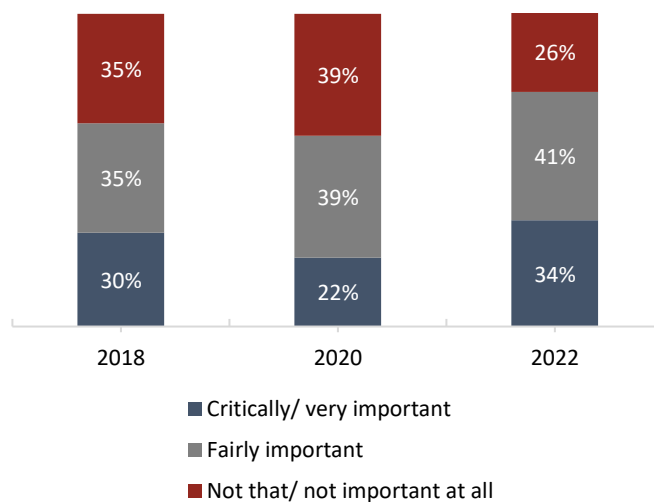
As recently as 2020, two-in-five (39%) Canadians said the shipping industry was not important to their daily life, with one-in-five (22%) believing the opposite. Now, one-quarter (26%) believe shipping to be non-essential to their day-to-day life; one-third (34%) disagree and believe it to be “critically” or “very” important.

Indeed, four-in-five (82%) say global issues such as inflation, Russia's invasion of Ukraine, and the COVID-19 pandemic have increased their awareness of how the global network of goods works.

An estimated 70 to 80 per cent of items used daily by Canadians are [brought by ship](#). Canadians are much more aware of this fact now than they have been in recent years. In 2018, half of Canadians voiced an awareness that most or the vast majority of products they used daily were transported by ship. Now three-in-five (61%) say the same.

While Canadians give the shipping industry a high mark on safety (91% believe it to be very or generally safe), there remain common concerns about the impacts of shipping. Three-in-five (61%) worry about potential spills from oil tankers. A similar number (57%) fear the risk of ships dumping garbage. Half (53%) say the prospect of ships spilling their own fuel is a concern.

How important do you think the shipping industry is for your day-to-day life?



METHODOLOGY:

The Angus Reid Institute conducted an online survey from Oct. 19-21, 2022, among a representative randomized sample of 1,623 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 percentage points, 19 times out of 20. Discrepancies in or between totals are due to rounding. The survey was conducted in partnership with Clear Seas Centre for Responsible Marine Shipping and paid for jointly by ARI and Clear Seas. Detailed tables are found at the end of this release.

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Although the potential for spills from tankers is the top risk for Canadians, overall residents are more confident than not when it comes to the shipping of petroleum products in general (60% confidence) and liquefied natural gas (LNG) more specifically (67% confidence).

More Key Findings:

- Fewer than one-in-five (17%) believe Canada should prioritize reducing greenhouse gas emissions in shipping above other industries. More instead believe it should have equal (42%) or low (28%) priority when compared to other industries.
- Amid a cost-of-living crisis, two-in-five (38%) say they would not pay any additional amount on goods shipped from overseas if it meant reducing or offsetting emissions. Another one-in-five (22%) say they would pay less than one per cent.
- Majorities believe the Canadian Coast Guard (69%), Canada's port and harbour authorities (62%) and the shipping industry in general (59%) are doing a good job contributing towards safe shipping in Canadian waters. Provincial governments (49%), federal departments managing the industry (49%), and the federal government more generally (44%) receive less praise.

About ARI

*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.*

About Clear Seas

***Clear Seas Centre for Responsible Marine Shipping** is a Canadian not-for-profit organization that provides impartial and evidence-based information about marine shipping – risks, benefits, mitigation measures, best practices – to policy makers and the public. Clear Seas' vision for safe and sustainable shipping is holistic, encompassing the environmental, social, and economic impacts of marine trade. Clear Seas was launched in 2015 to be a leading source of independent, fact-based information on safe and sustainable marine shipping.*

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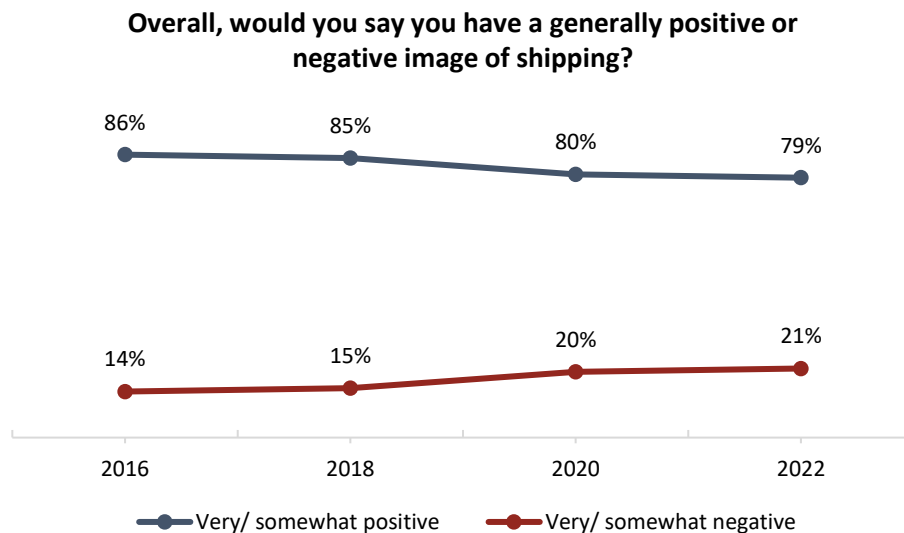
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Part One: Public impressions of marine shipping

Marine shipping plays an important role in delivering Canadians the goods they use in their everyday life. More than 70 per cent of the goods Canadians use daily are brought to Canada by ship. Marine shipping is also important in getting Canadian goods to international markets – 20 per cent of Canadian imports and exports by dollar value travel to and from the country by ship.

All in all, the marine shipping industry is worth \$30 billion to Canada's economy, or about 1.8 per cent of Canada's GDP.

Canadians' impression of marine shipping has been consistently positive. Since 2016, at least four-in-five Canadians say they have a "very" or "somewhat" positive view of marine shipping. Notably, however, negative impressions have increased by seven points since 2016. One-in-five (21%) now say they have a "very" or "somewhat" negative view of marine shipping:

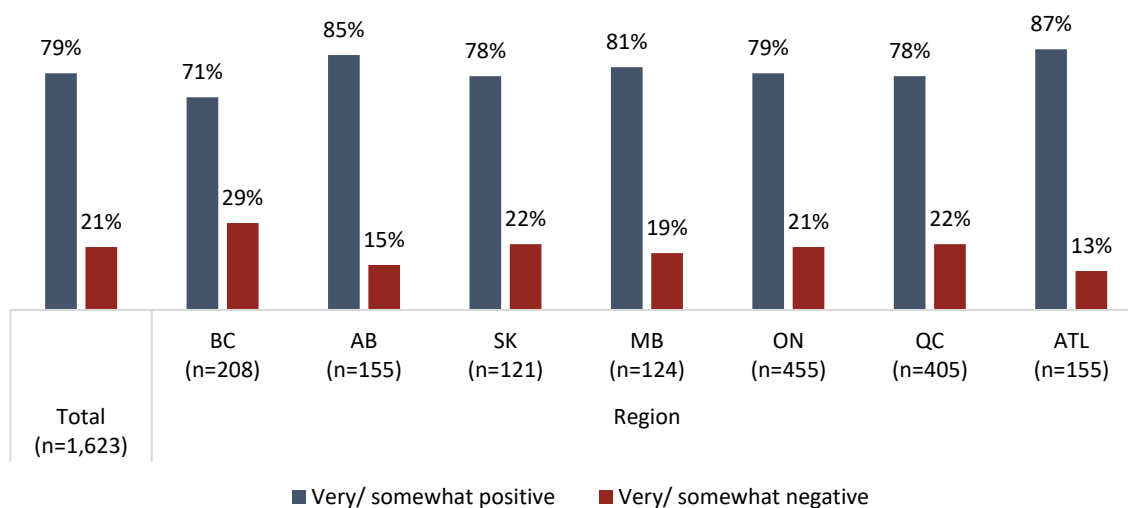


The view of the industry varies on Canada's east and west coasts, despite shipping's importance as an economic cog in both regions. Three-in-ten (29%) in British Columbia have a negative impression of the industry, more than twice the number of those in Atlantic Canada (13%) who say the same. British Columbians have held higher negative views of shipping consistently over the years, though they are still in the minority.

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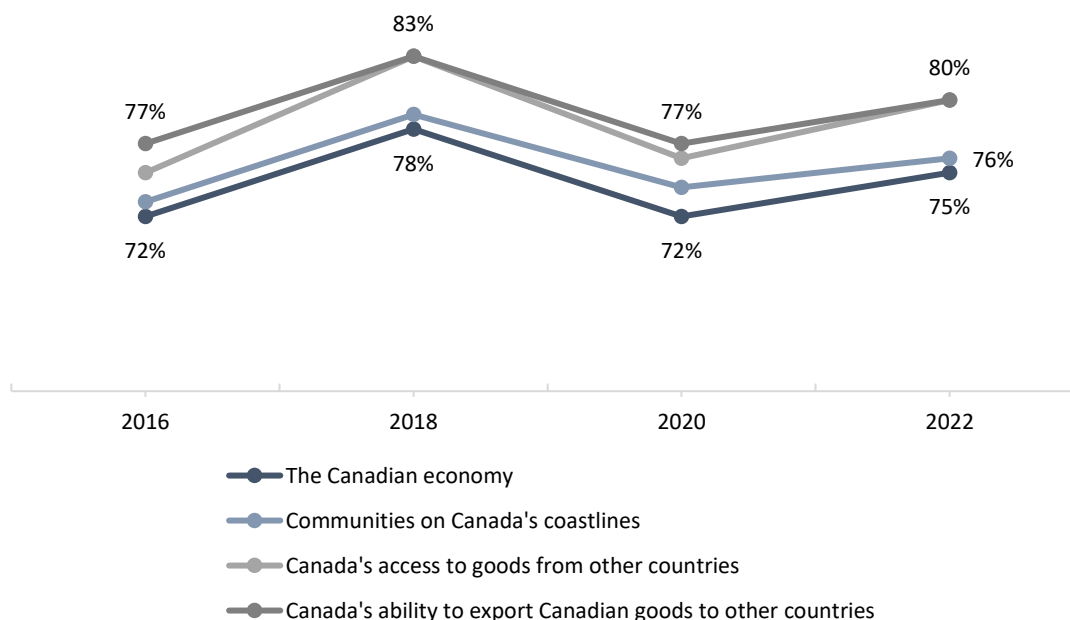
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Overall, would you say you have a generally positive or negative image of shipping?



A majority of Canadians affirm the importance of the marine shipping industry to the country's economy (75%), communities on Canada's coastlines (76%), and the import (80%) and export (80%) of Canadian goods. Since 2016, at least seven-in-ten Canadians say the shipping industry is key to those four elements of Canada:

Percentage who say the shipping industry is 'critically' or 'very important' for each



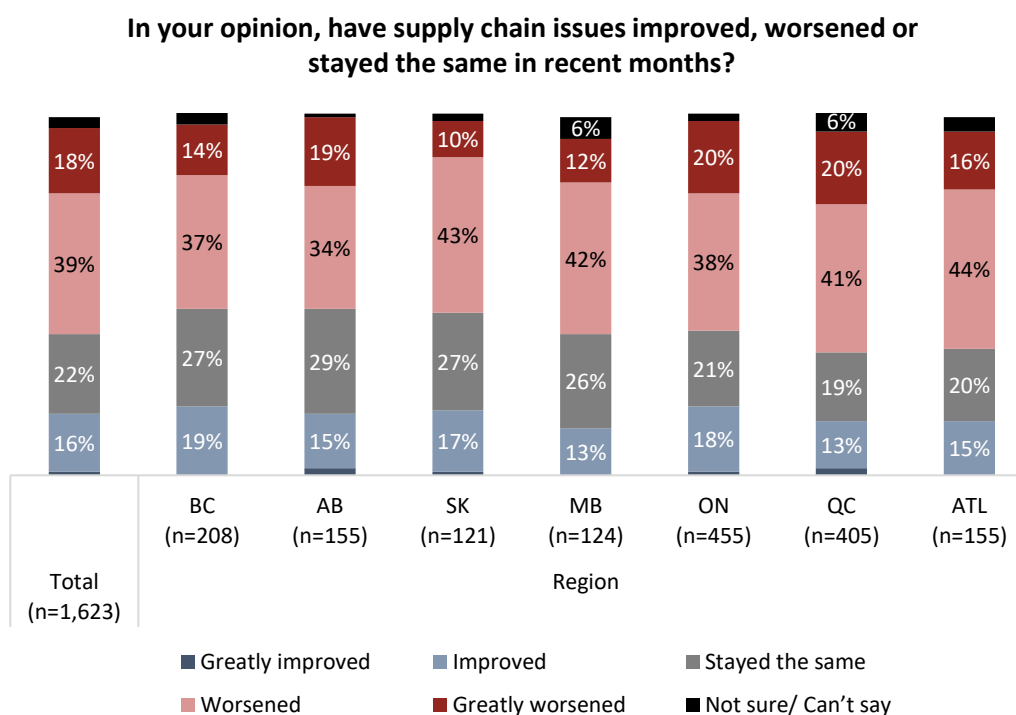
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Supply chain woes increasing awareness of shipping network

The shipping industry is an important part of the global supply chain, which has buckled in the pandemic era. COVID-19 lockdowns – especially in China, one of the world's largest exporters of goods – put the initial pressure on the supply chain. The subsequent Russian invasion of Ukraine has driven up the cost of fuel and complicated global supply networks for food.

Canadians are more likely to feel the supply chain woes have increased in recent months. Three-in-five (57%) believe supply chain issues have worsened. Fewer than one-in-five (17%) have noticed improvement. Those in Alberta (19%), Ontario (20%) and Quebec (20%) are most likely to believe the supply chain issues have become much worse in recent months:

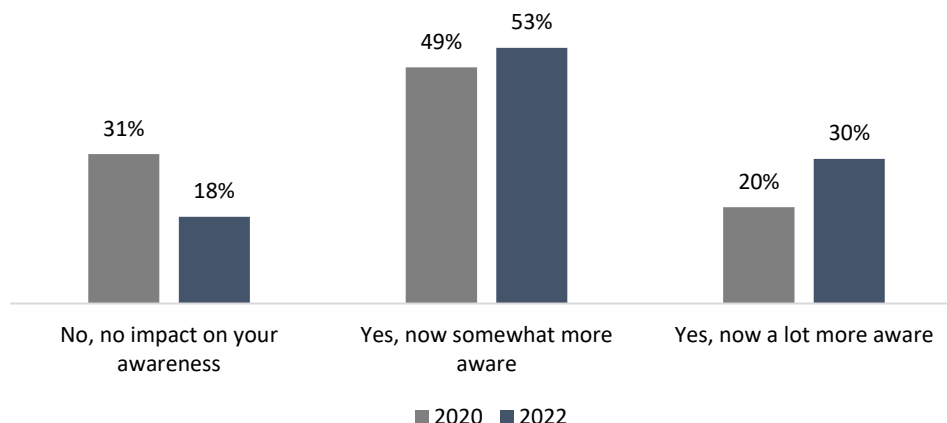


Most Canadians say recent global events – the ongoing COVID-19 pandemic, climate change, Russia's invasion of Ukraine – have increased their awareness of how the global network of goods functions. Three-in-ten (30%) say they are now a lot more aware of how products move around the world, and half (53%) say they are somewhat more aware. Both those figures are greater than when ARI asked a similar question in 2020 about the effect the COVID-19 pandemic had on Canadians' awareness of the supply chain:

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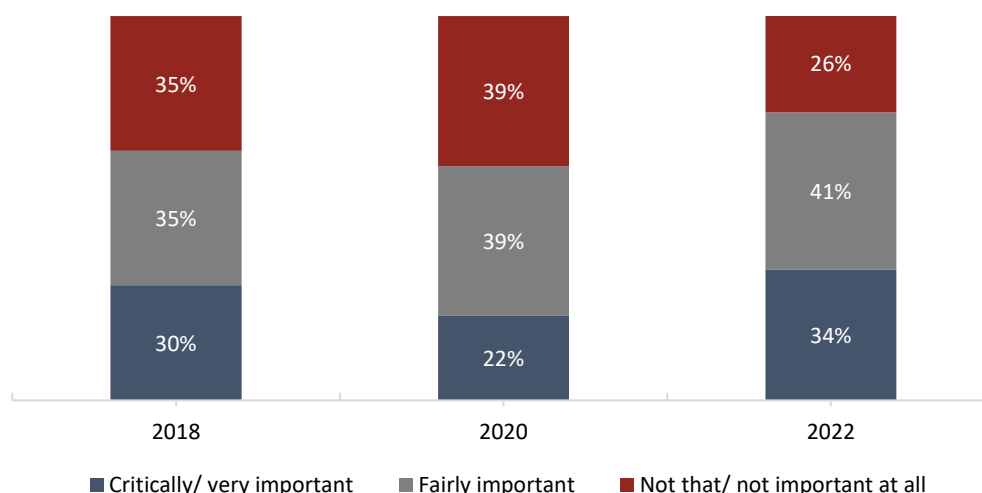
Have global issues* had any impact on your own overall awareness of how products move around the world?



**In 2020, respondents were asked only about COVID-19. In 2022, respondents were asked about inflation, Russia's invasion of Ukraine, COVID-19 pandemic, and climate change.*

Perhaps in relation to the above data, Canadians are now much more likely to believe shipping plays an important role in their day-to-day life. In 2018, one-third (35%) believed the shipping industry was not important to their daily life. That figure has declined to one-quarter (26%). One-third (34%) now say they believe shipping to be “critically” or “very” important to their life – a 12-point jump from 2020:

How important do you think the shipping industry is for your day-to-day life?

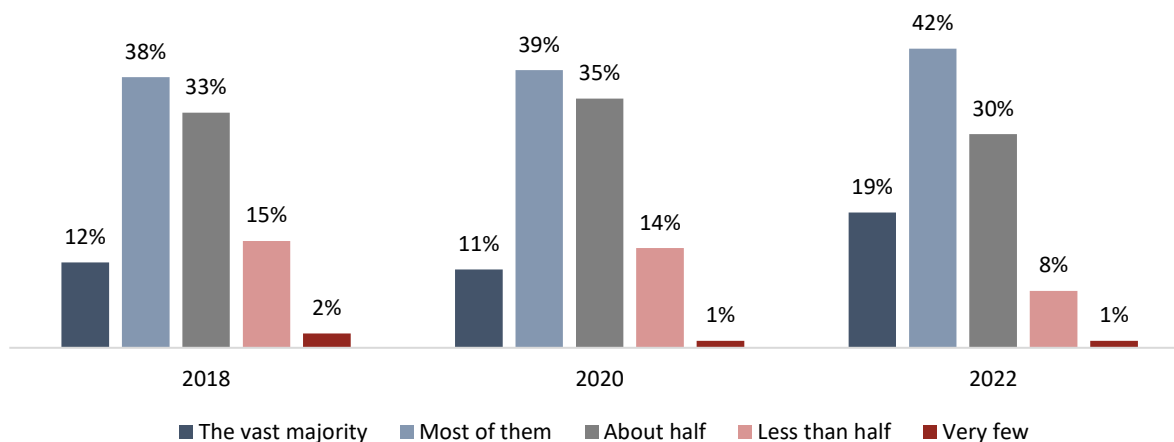


There is a growing recognition by Canadians of the number of goods that arrive by ship following two years of supply chain strife. Three-in-five (61%) now estimate most or the vast majority of items they use on a daily basis arrive by ship, an increase from the half who said so in both 2018 and 2020:

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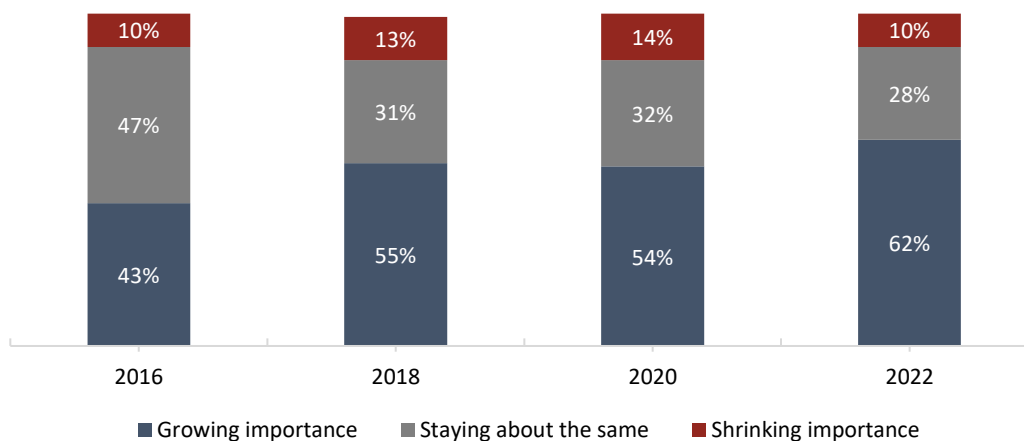
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Of all the products you use on a daily basis, what proportion of these items would you estimate were transported by ship before they got to you?



Finally, there is a growing belief that shipping is increasing in importance in recent years. Three-in-five (62%) believe marine shipping has been growing in importance over the past 20 years. In 2016, that figure was two-in-five (43%):

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?

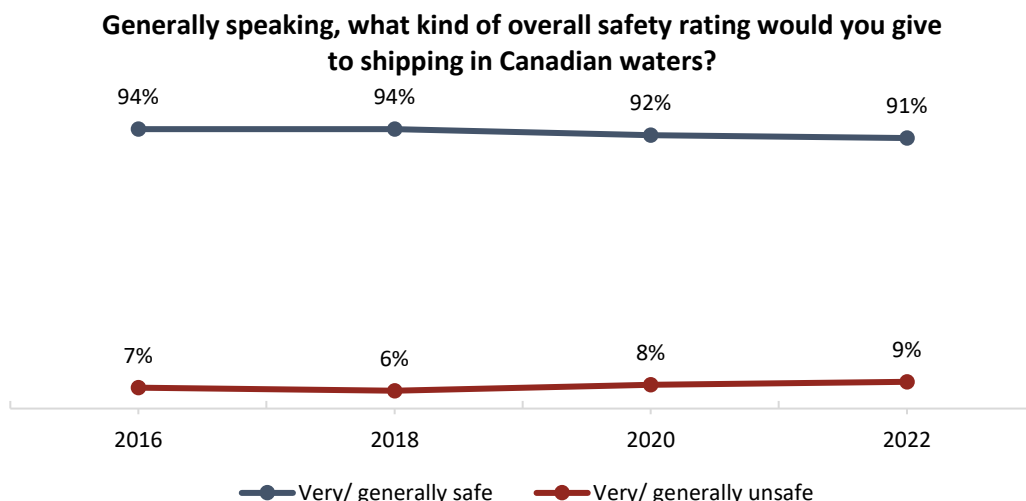


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Part Two: Safety and marine shipping

Nearly all (91%) Canadians believe shipping is done safely in the waters surrounding the country. This has been a steady belief since ARI and Clear Seas first asked on this subject in 2016:



Still, there are some concerns over potential impacts from the marine shipping industry. The top worries are related to water pollution. Three-in-five (61%) say they worry about the risk of potential spills from oil tankers. Nearly as many (57%) say this of ships dumping waste into Canadian waters. Half (53%) worry about ships spilling fuel, while half (49%) are concerned about water pollution in general.

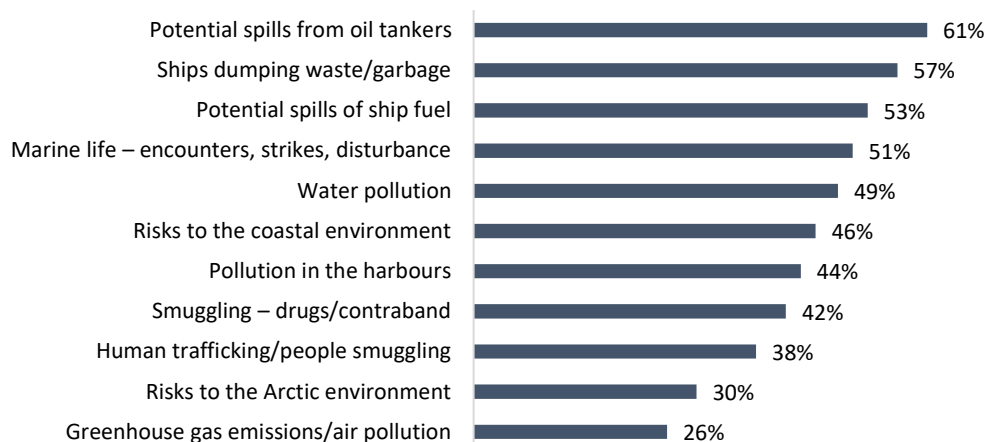
Though the amount of oil shipped worldwide has increased significantly, oil spills are happening less frequently due to improved safety measures. For example, Transport Canada's National Aerial Surveillance Program established in 1991, uses planes stationed across the country to help detect and prevent marine pollution. A 2013 Transport Canada-commissioned independent assessment found Canada to be at low risk for large oil spills.

Other environmental risks are also top of mind for Canadians. Half (51%) say they are concerned about ships striking or otherwise disturbing marine life. Further down the list of concerns, but still chosen by at least two-in-five, are issues of smuggling (42%), and human trafficking (38%):

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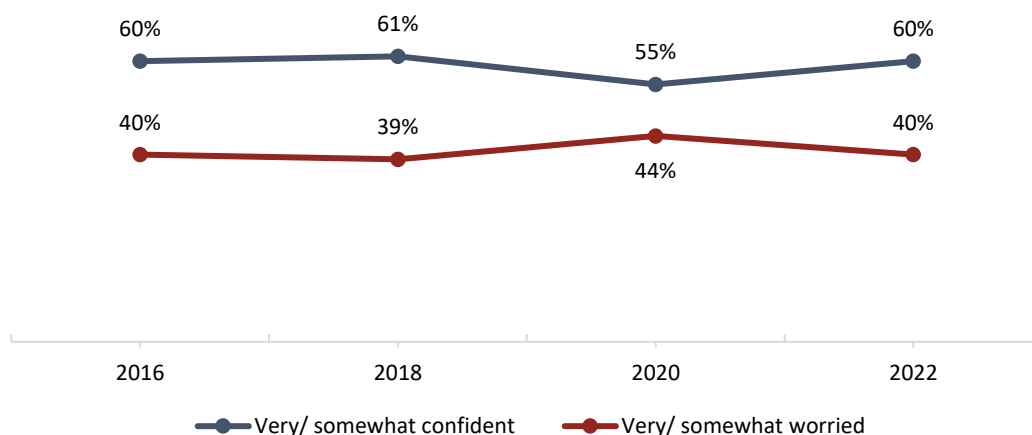
**Risks of marine shipping Canadians are concerned about
(Selections with more than 20% shown;
all respondents, n=1,623)**



Majorities confident in shipping of oil and LNG

Though spills from oil tankers top the list of shipping worries for Canadians, a majority (60%) say they are confident in the safety of transporting petroleum products in Canadian waters. Confidence dipped in 2020 to 55 per cent, but otherwise has remained consistent at this three-in-five level:

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?



The [global energy price shock](#) brought on by Russia's invasion of the Ukraine has renewed calls in Europe for the continent to supplant Russian sources of energy. Liquefied natural gas (LNG) from Canada has been touted as [a potential alternative](#) to Russian natural gas. On the east coast, however,

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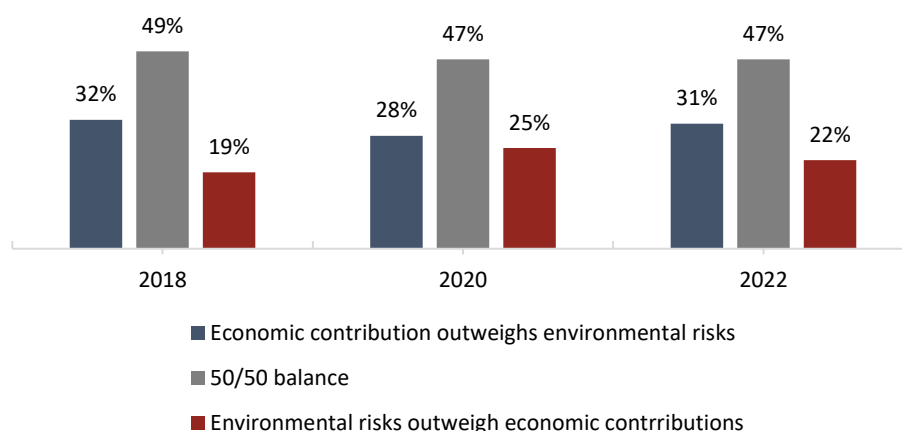
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there is much work to be done before any LNG could be exported from Canada's Atlantic shores. LNG Canada, a \$40-billion project in Kitimat, B.C., is closer to completion.

Canadians are more confident in shipping LNG than traditional petroleum products. More than two-thirds (67%, see detailed tables) say they are more confident than worried about shipping LNG in Canadian waters.

Overall, half (47%) of Canadians believe the environmental risks are balanced by the economic benefits of marine shipping in general. For the other half, more believe that economic benefits carry more weight (31%) than believe the environmental risks outweigh the potential financial rewards (22%):

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

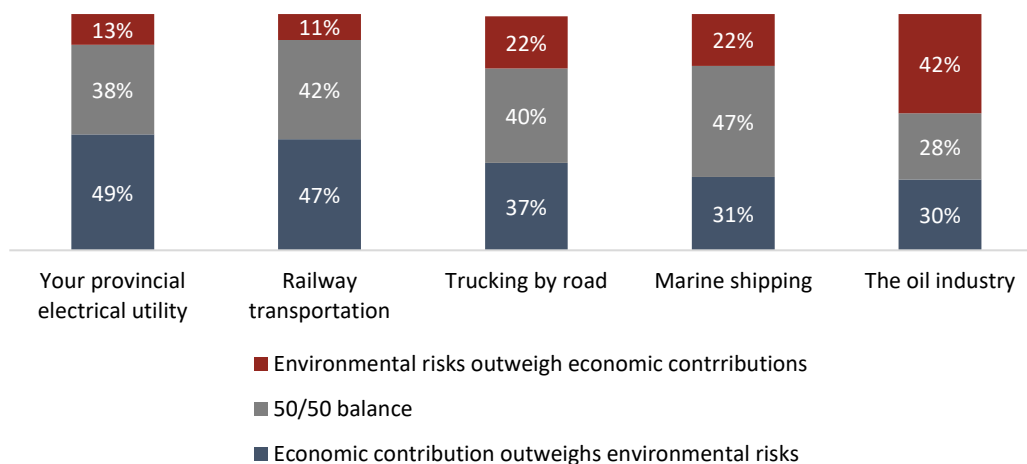


When compared to other shipping methods and industries, marine shipping is more likely to be seen as economically beneficial – despite the environmental risks – than the oil industry. However, electricity generation, railway transportation, and road transport are viewed as more likely to be worth the environmental risks in economic benefits than transport by sea:

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**How Canadians weigh the economic contributions against potential environmental risks of various industries
(All respondents, n=1,623)**



Emissions and shipping

The federal government has set a goal to reach net zero emissions by 2050, which means every industry's emissions will have to be reduced or offset, including marine shipping. The International Maritime Organization (IMO) has set a goal of reducing emissions in the shipping industry by 70 per cent from 2008 levels by 2050.

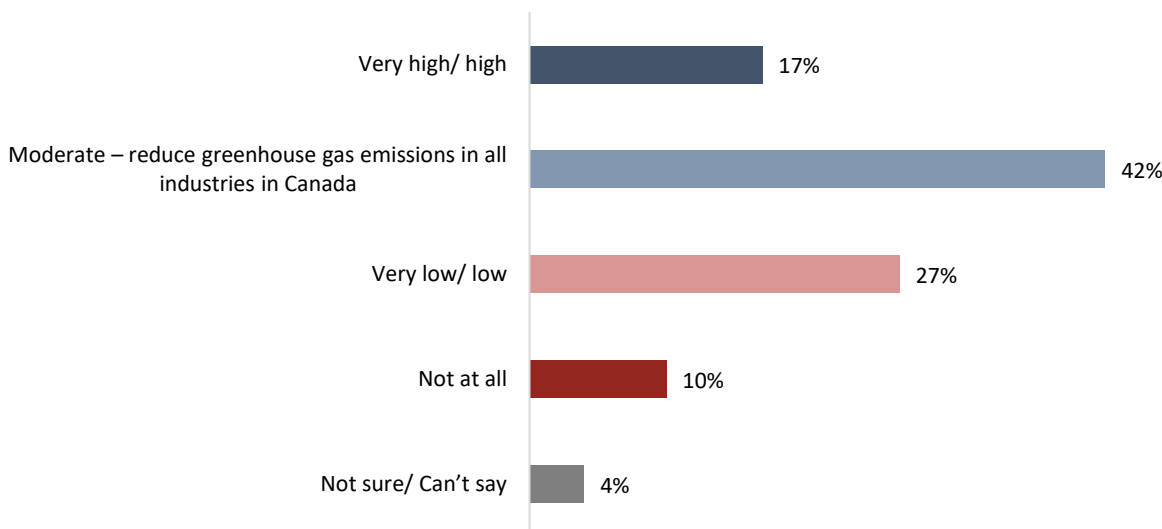
Reducing emissions in shipping has been described as difficult for several reasons. Viable alternatives to fossil fuels available at the size and scale needed by large ships are not yet widely available. And because of the long life-cycle of ships – an average of 25 to 30 years – older and less efficient ships remain in operation for a long time.

Few Canadians – less than one-in-five (17%) – believe the shipping industry should be a top priority for emissions reductions. Instead, a plurality believes (42%) all industries should reduce emissions, while nearly as many (37%) believe marine shipping is a lesser priority than other industries:

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**In your opinion, how should Canada prioritize reducing greenhouse gas emissions in the global shipping industry?
(All respondents, n=1,623)**



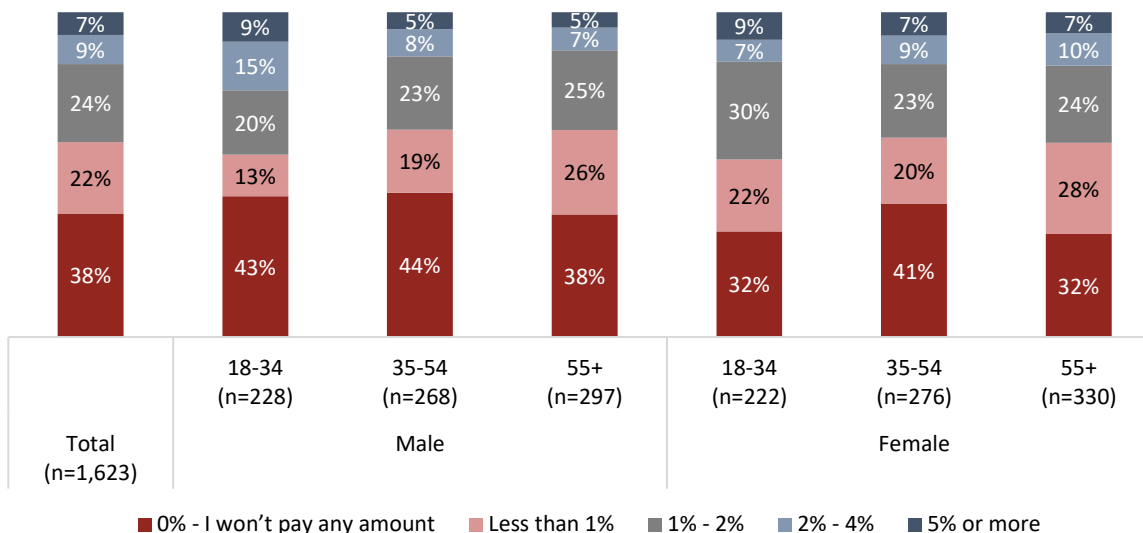
In the midst of [a cost-of-living crisis](#), a majority do not have much appetite for an increase in prices to help offset marine shipping emissions. Two-in-five (38%) would not pay any amount extra if it meant lower emissions for items shipped from overseas. One-in-five (22%) say they would pay less than one per cent more. One-quarter (24%) say they would pay between one and two per cent, while one-in-six (16%) are willing to pay two per cent or more.

Men are much more likely than women to say they will not pay any amount extra to offset emissions from the marine shipping industry. However, men aged 18- to 34-years-old are the most likely demographic to say they would pay two per cent or more on items from overseas if it meant reduced emissions:

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How much, if anything, are you willing to pay extra on items shipped from overseas if it meant reducing or offsetting shipping emissions?

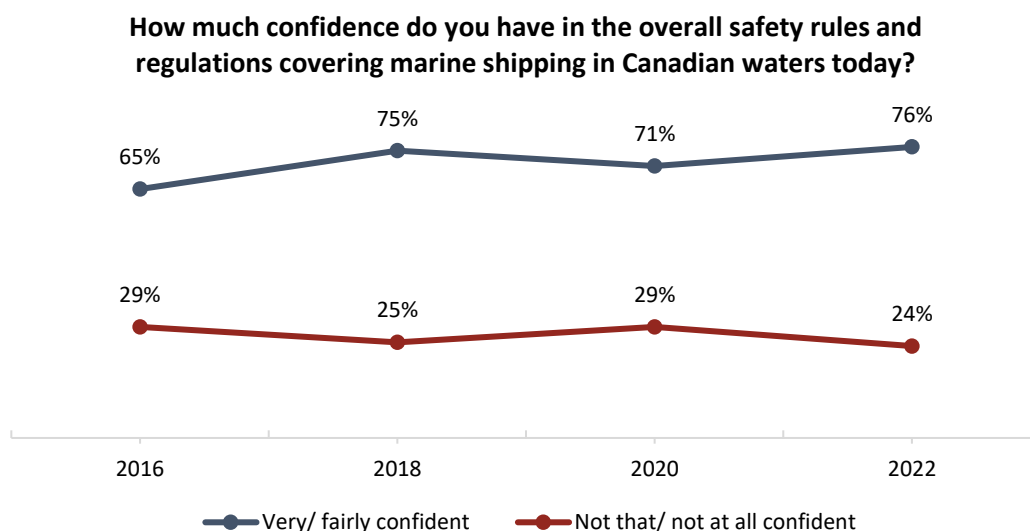


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Part Three: Views on shipping regulation

Canadians' confidence in the regulation of the shipping industry has increased since 2016. Three-quarters (76%) now say they are very or fairly confident in the rules covering transportation in Canadian waters; two-thirds (65%) said so in 2016:

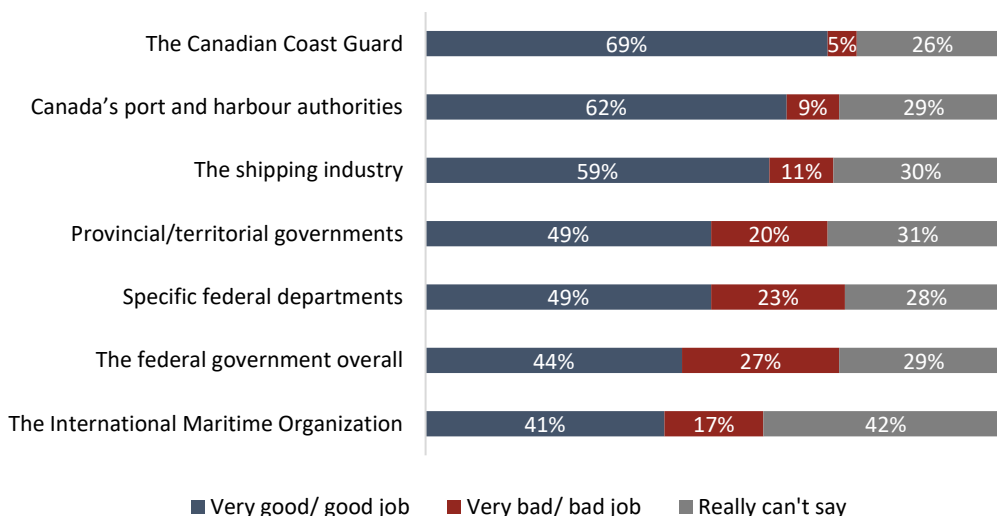


This high level of confidence does not extend to all elements of the regulatory system. While majorities believe the Canadian Coast Guard (69%), port and harbour authorities (62%) and the shipping industry (59%) are doing well in contributing to safe shipping in Canadian waters, there is less positivity towards provincial governments (49%), federal departments (49%) and the federal government overall (44%). At least one-in-five (provincial governments, 20%; federal departments, 23%; federal government, 27%) believe these latter three are instead doing a poor job of contributing to safe shipping:

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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?



The perception of the federal government's contribution towards safe shipping has declined since 2016 when two-thirds (64%) said it was doing a good job on that matter. Positive appraisal of provincial and territorial governments has also declined by 13 points:

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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? (Percentage selecting 'good' or 'very good' job shown)				
	Year			
	2016	2018	2020	2022
The Canadian Coast Guard*	-	-	77%	69%
Canada's port and harbour authorities	66%	76%	70%	62%
The shipping industry	64%	71%	62%	59%
Provincial/ territorial governments	62%	52%	52%	49%
Specific federal departments*	67%	67%	57%	49%
The federal government overall	64%	52%	47%	44%
The International Maritime Organization	58%	51%	44%	41%

*Note: The Canadian Coast Guard was included with federal departments in the 2016 and 2018 surveys.

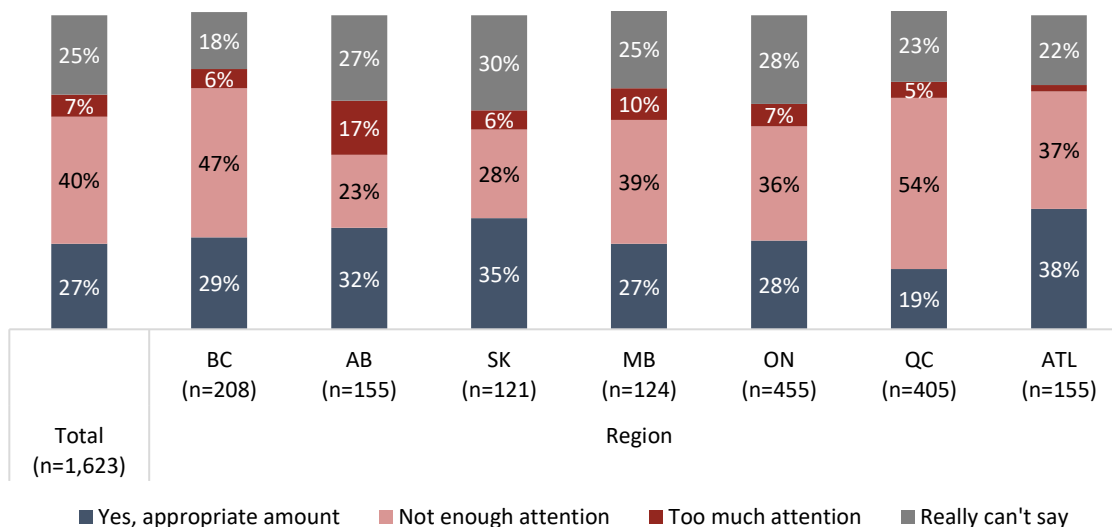
There is significant belief among Canadians that governments have not paid enough attention to marine shipping safety. Two-in-five (40%) say this issue does not receive the appropriate amount of attention, while one-quarter (27%) believe the opposite. Fewer than one-in-ten (7%) believe too much attention is paid to marine shipping safety.

The sentiment that more attention should be paid to marine shipping safety is strongest in two provinces with strong connections to the marine shipping industry: British Columbia (47%) and Quebec (54%):

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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?



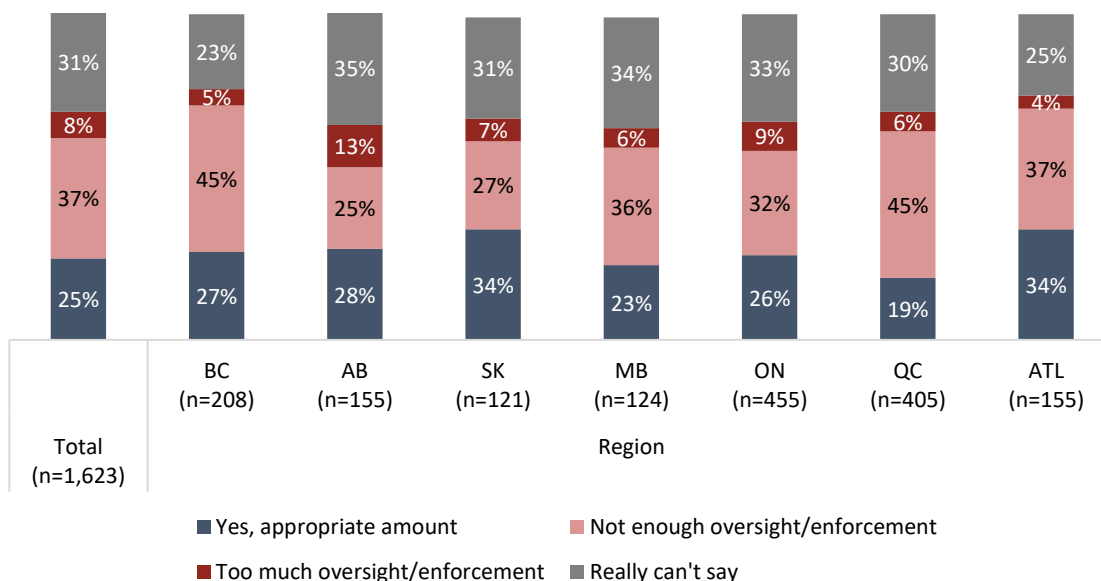
Those two provinces, too, are more likely to believe there is not enough oversight or enforcement of marine shipping safety policies. More than two-in-five in British Columbia (45%) and Quebec (45%) say this.

Nationally, one-quarter (25%) believe the government is doing the appropriate amount of oversight and enforcement of marine shipping safety, while two-in-five (37%) believe there is more to be done:

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Do you think there is an appropriate amount of government attention in terms of the oversight and enforcement of marine shipping safety policies?



The Oceans Protection Plan

The federal government's [Oceans Protection Plan \(OPP\)](#) was launched in 2016, a \$1.5-billion investment to protect Canada's coasts and waterways. The plan included improving the marine safety system on all three coastlines, preserving and restoring marine ecosystems, creating stronger partnerships with Indigenous Peoples and coastal communities, and increasing preparedness for oil spill response.

The federal government [renewed the program](#) in 2022, with an additional \$2 billion of funding over nine years.

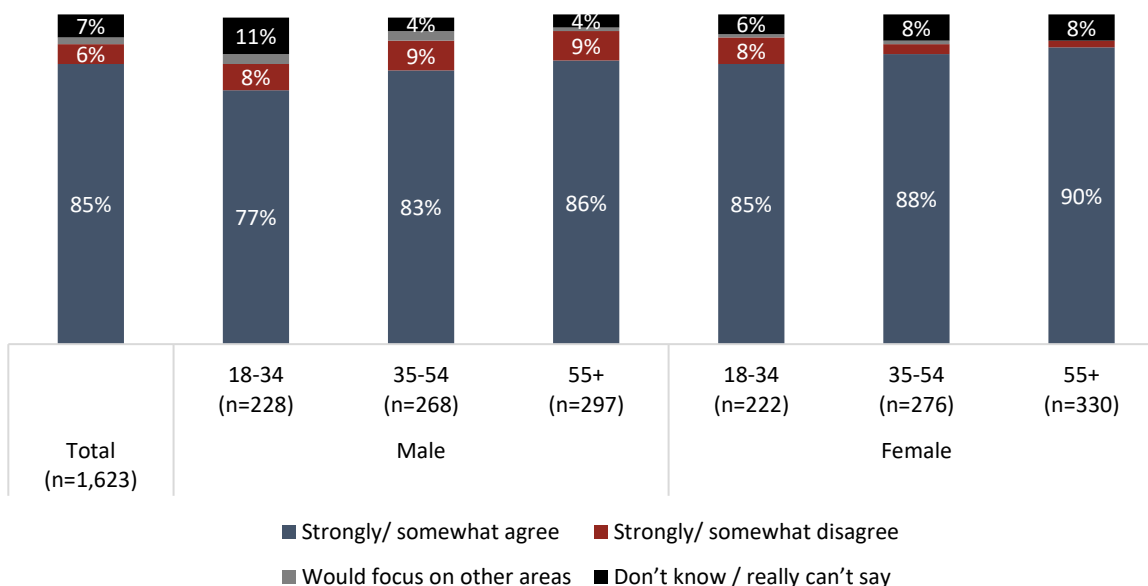
Knowledge of the OPP has increased [since 2018](#), when ARI and Clear Seas last surveyed Canadians on the plan. Two-in-five (42%) have some knowledge of the plan ([see detailed tables](#)).

Canadians are near universal in their support of the pillars of the OPP. Only a handful disagree with them (6%) or believe the plan should focus on other areas (2%). Men aged 18- to 34-years old are less likely than other demographics to agree with the pillars (77%), though a majority still do so:

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What is your opinion of the four pillars of the Oceans Protection Plan?



Emergency towing vessels: public or private responsibility?

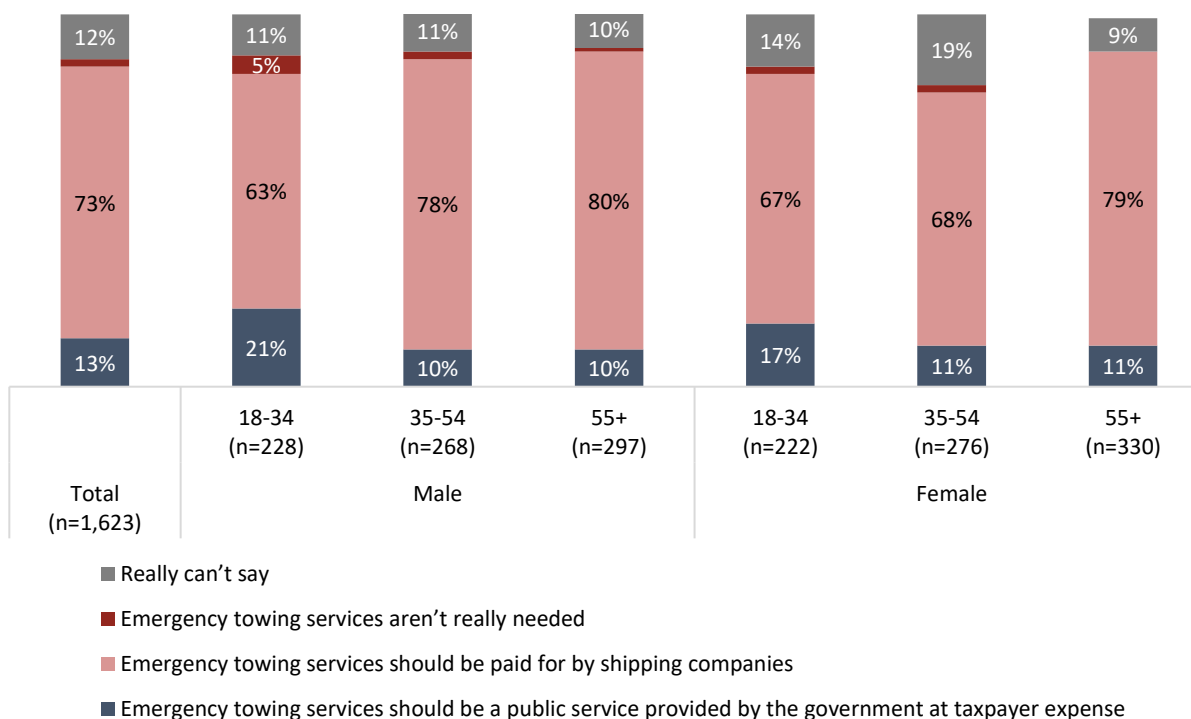
As part of the OPP, the Canadian government leased two emergency towing vessels (ETVs) stationed on the west coast. ETVs are powerful tugboats that can rescue ships in distress. Though Canada has the two ETVs on the west coast, for other parts of Canada's waters, ships in need of assistance rely on "vessels of opportunity" or suitable ships nearby for emergency response. The government says it is currently developing [a long-term plan](#) while factoring in information learned from the leased vessels on the west coast.

Three-quarters (73%) of Canadians believe it should be the responsibility of shipping companies to pay for emergency towing services. Few (13%) believe it should be a government service paid for by taxpayers:

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Which statement best represents how you feel about ETVs:



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Part Four: Shipping Confidence Index

In order to better understand Canadian perspectives on the marine shipping industry, ARI developed the Shipping Confidence Index in 2020 which analyzed respondents' views on shipping safety and regulation and relative importance of the industry to the economy.

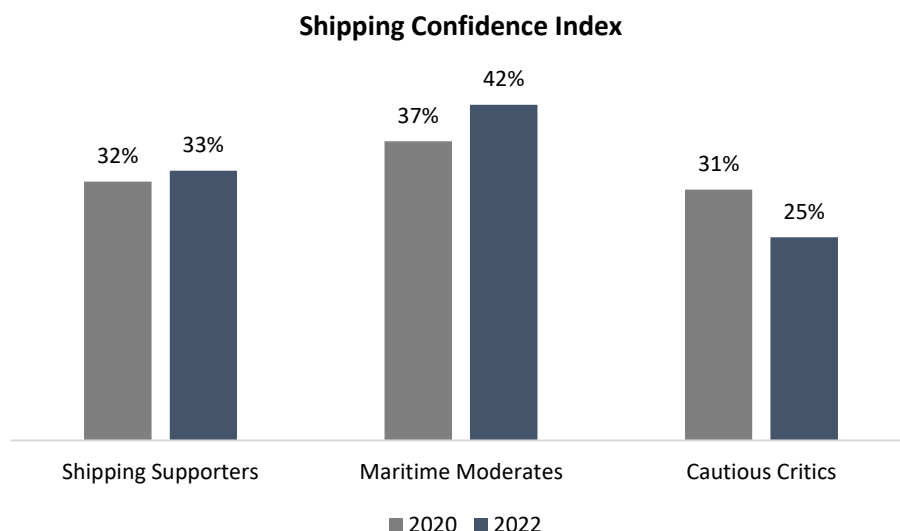
The Shipping Confidence Index is comprised of three groups: **Shipping Supporters**, **Maritime Moderates**, and **Cautious Critics**.

Shipping Supporters (33%) 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 (42%), 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.

Of the three groups, **Cautious Critics** (25%) express the highest rates of skepticism when it comes to the importance of the industry and its overall safety. This group is also defined by high levels of concern related to the environmental risks of the industry.

Since 2020, fewer Canadians fall into the Cautious Critics category while more are considered to be Maritime Moderates by the Index.

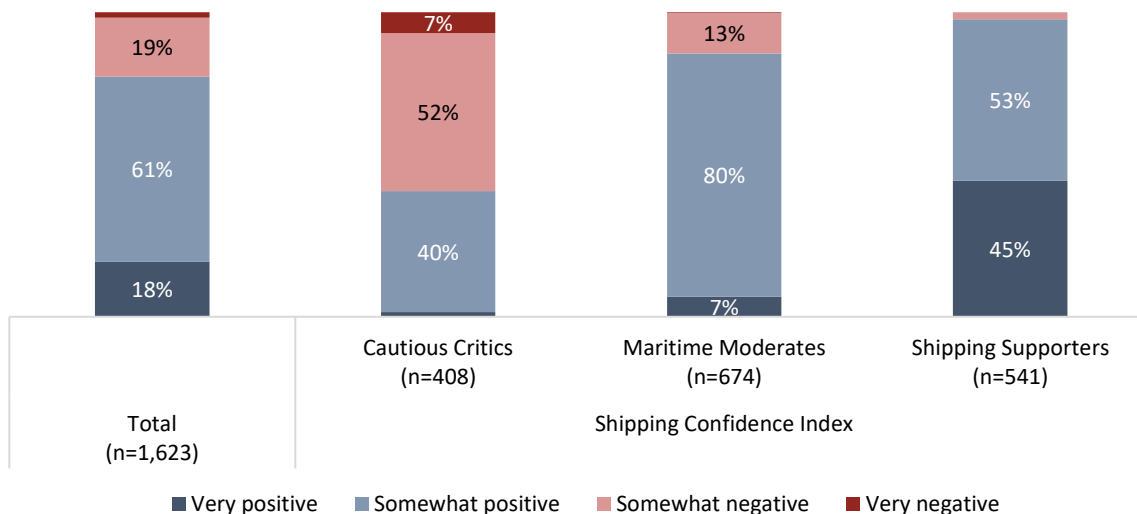


Three-in-five (59%) Cautious Critics have a negative view of the shipping industry overall. Views are much more positive among Maritime Moderates and Shipping Supporters. For the Cautious Critics, perhaps this is because they are much more likely to believe the environmental risks of shipping outweigh the economic benefits (46%) when compared to Maritime Moderates (19%) and Shipping Supporters (7%, [see detailed tables](#)).

CONTACT:

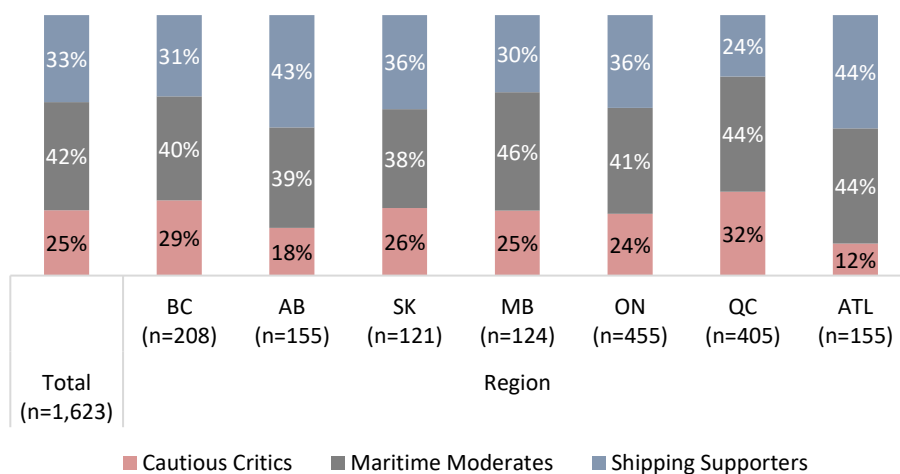
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Overall, would you say you have a generally positive or negative image of shipping?



Cautious Critics are most common in Quebec (32%) and British Columbia (29%). More than two-in-five in Atlantic Canada (44%) and Alberta (44%) are classified as Shipping Supporters, the most in the country:

Shipping Confidence Index

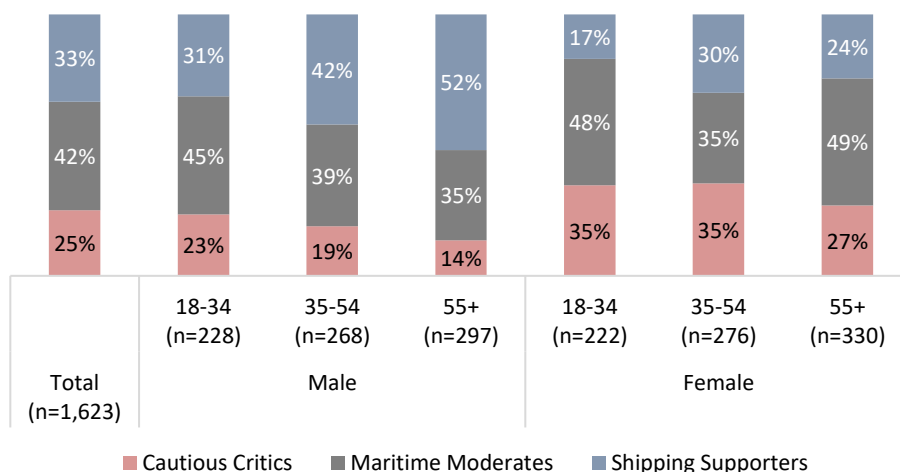


Half of men over the age of 54 (52%) fall into the Shipping Supporters category, the most of any demographic. Women are much more likely to be Cautious Critics than men, while 18- to 34-year-old women are the least likely to be considered Shipping Supporters by the Index:

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Shipping Confidence Index



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.

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

For detailed results by the Shipping Confidence Index, [click here](#).

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