

Zero-Carbon Shipping: Majority of Canadians willing to pay extra to offset emissions

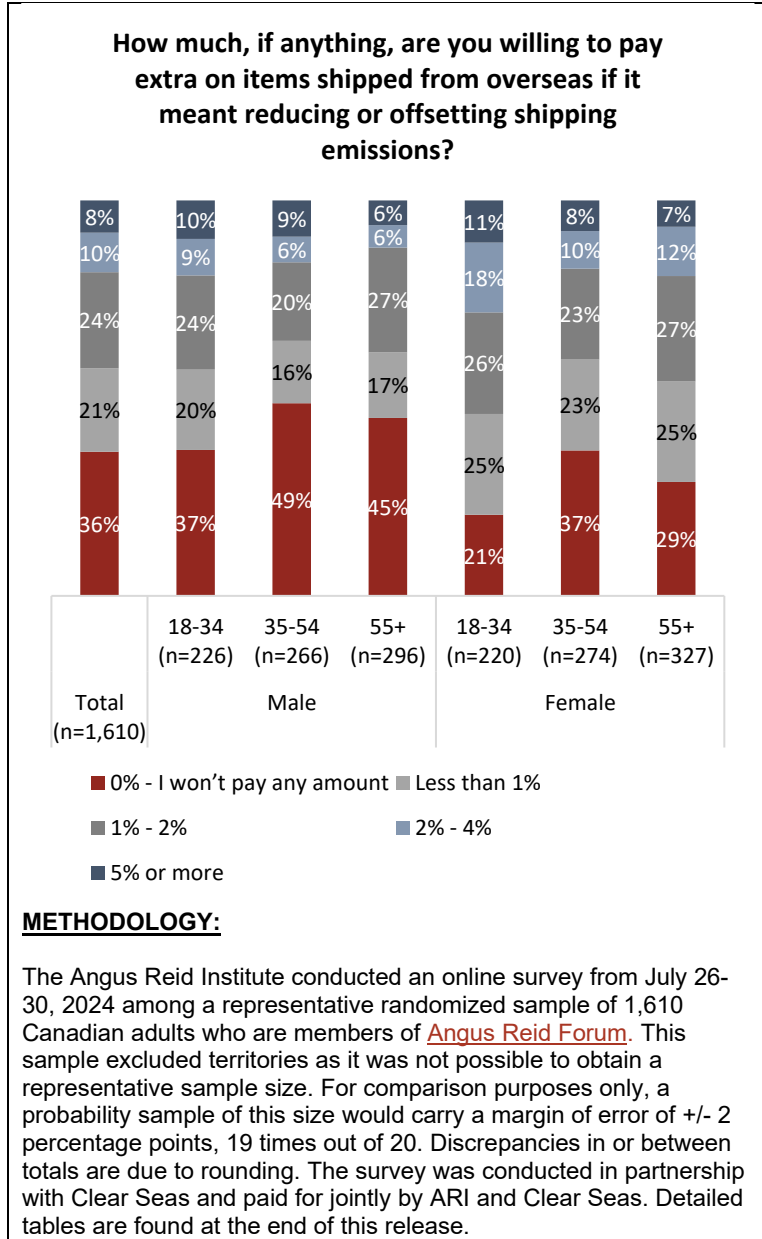
As Canada considers green hydrogen, Canadians prefer it used for domestic decarbonization over export

October 1, 2024 – Canada’s path to net zero has many winding turns ahead. A combination of alternate fuels, new infrastructure and new technology will be required to get there. This will require investments by both governments and businesses, and perhaps an additional cost to the consumer.

New data from the non-profit Angus Reid Institute, in partnership with Clear Seas, finds a willingness among Canadians to contribute when it comes to paying extra on items shipped from overseas if it means reduced carbon emissions. Two-thirds (64%) of Canadians say they would pay something extra to help decrease emissions, including one-in-five (18%) who would pay more than two per cent extra.

This comes as there is much discussion over how to decarbonize the shipping industry as the world moves towards a low-carbon future. Hydrogen is viewed as a potential future fuel source, and Canada is in the process of planning an expansion of its hydrogen production. Two-thirds (67%) of Canadians say they would prefer that Canada use hydrogen domestically to decarbonize its own industries, including marine shipping, rather than export it abroad. One-in-six (17%) say Canada shouldn’t invest in hydrogen at all.

Overall, Canadians are more likely to say marine shipping’s economic contributions outweigh its environmental risks (30%) than the other way around (18%). This, while offering high marks for the general safety of the industry (92% say it is “very” or “generally” safe) and expressing more positivity than negativity towards shipping generally (81% have a positive image, 19% negative).



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More Key Findings:

- At least seven-in-ten Canadians view marine shipping as “critically” or “very” important to the Canadian economy (73%), coastal communities (74%), Canada’s access to goods from other countries (79%) and the ability for Canada to export goods internationally (77%).
- Canadians are more likely to have noticed improvements in supply chain issues (34%) than an increase in problems (18%) in recent months. However, more than one-third (37%) say the supply chain has stayed the same and half (49%) say they have experienced a supply chain issue in their personal or work life.
- A majority (57%) believe shipping in Canada is growing in importance over the past 20 years, fewer than those who said so in 2022 (62%), but still more who believed that than in 2016 (43%).

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** is a Canadian not-for-profit organization that provides independent fact-based information to enable governments, industry, and the public to make informed decisions on marine shipping issues. We work to build awareness and trust so that all people can feel a part of the marine sector. Our vision is a sustainable marine shipping sector that is safe, vibrant, and inclusive, both now and for future generations.*

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Part One: Public impressions of marine shipping

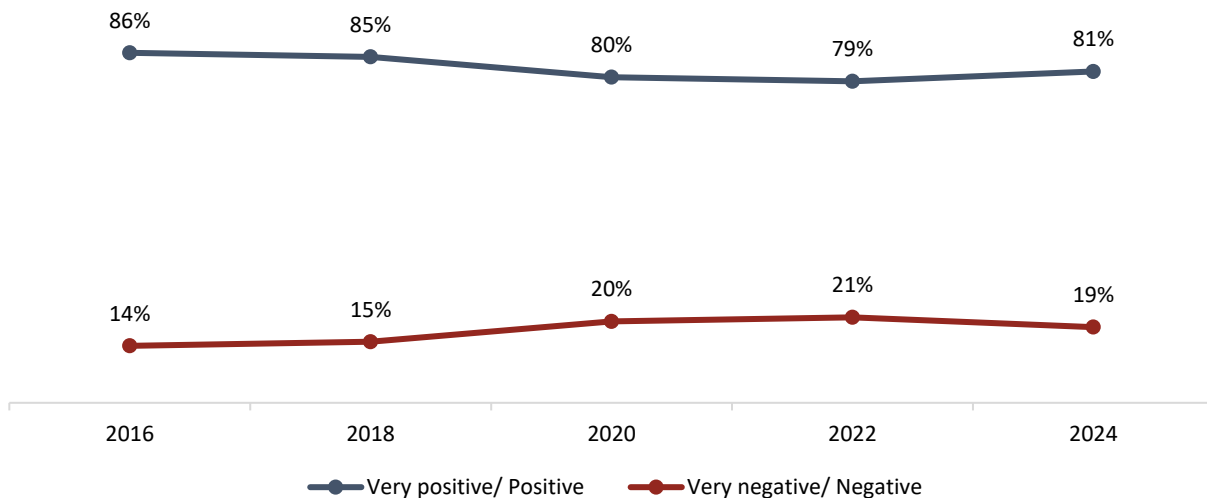
The 2020s so far have been an era of upheaval for global supply chains. First, COVID-19 caused a global pandemic of the likes not seen in over a century, [causing extensive backups at ports](#). Then in 2022 Russia invaded Ukraine, disrupting international trade of [wheat, corn, and oil](#), among other important goods. Two years would not pass before the world saw another supply chain-disrupting event, as at the end of 2023, Houthi forces based in Yemen began attacking shipping vessels in the Red Sea, causing many ships to avoid the Suez Canal, [lengthening the journey for container vessels between Asia and Europe](#). The [droughts in Panama](#), limiting ships' passage through the Panama Canal, further disrupted shipping traffic patterns and lengthened transit times.

As these events disrupted global supply chains, Canadians have felt the effects through inflation not seen [in nearly 40 years](#). Though inflation has cooled from highs seen two years ago, many are still struggling with the increased cost of living.

With this in the background, the Angus Reid Institute and Clear Seas have embarked on a biannual study of Canadian impressions of commercial marine shipping. This report marks the fifth edition of this survey.

Consistently over time, Canadians who have a positive impression of shipping outnumber those who say they have a negative impression by a four-to-one ratio.

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

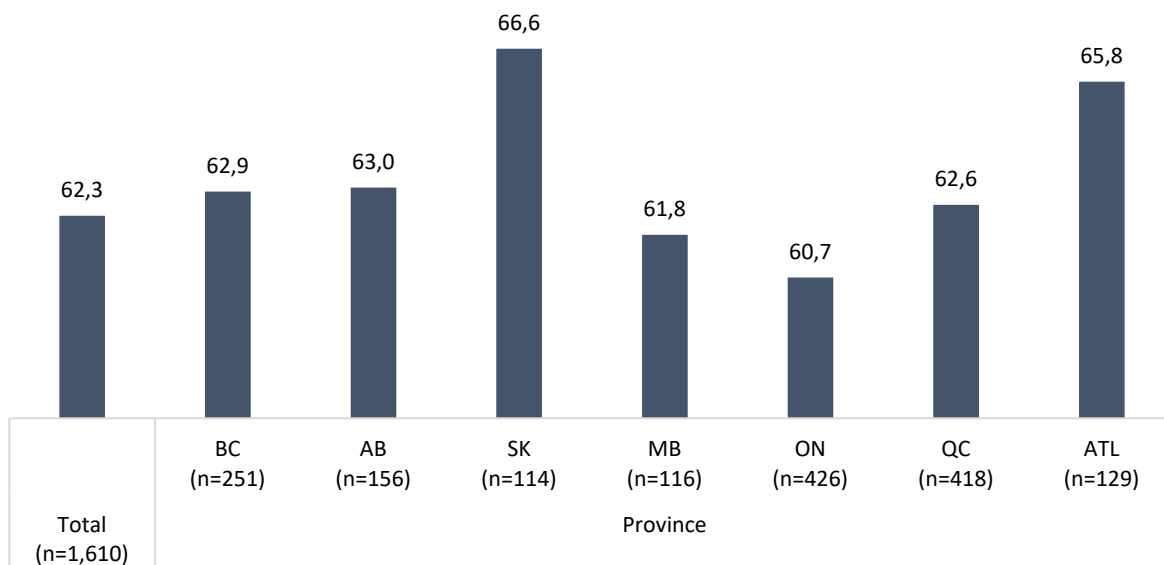


However, there are underlying regional trends. Historically, British Columbians had been more likely than residents in other provinces to say they had a negative impression of marine shipping. In 2022, 29 per cent in the province on the west coast said this. This has halved and now only 15 per cent say they have a negative view ([see detailed tables](#)). This puts them on par with Alberta (14%) and Atlantic Canada (15%). Ontarians (21%) and those living in Quebec (21%) are now the most likely to report a negative view of shipping now ([see detailed tables](#)).

When Canadians think of shipping, the top two terms chosen are “imports” (52%) and “exports” (48%). Not far down the list are “global” (38%), “ports” (37%) and “economy” (36%, [see detailed tables](#)). Evidently, Canadians have the global supply chain and trade in mind when they consider shipping.

This focus on the global supply chain may have also informed responses about the per cent of Canada’s total trade that is transported by ship. Here, most Canadians estimated 62%, with those living in Saskatchewan reporting the highest amount (67%) and those in Ontario the lowest (61%). This is significantly higher than the per cent share of Canada’s total trade reported by Statistics Canada in 2023 at 42% (24% imports and 18% exports) by ship.

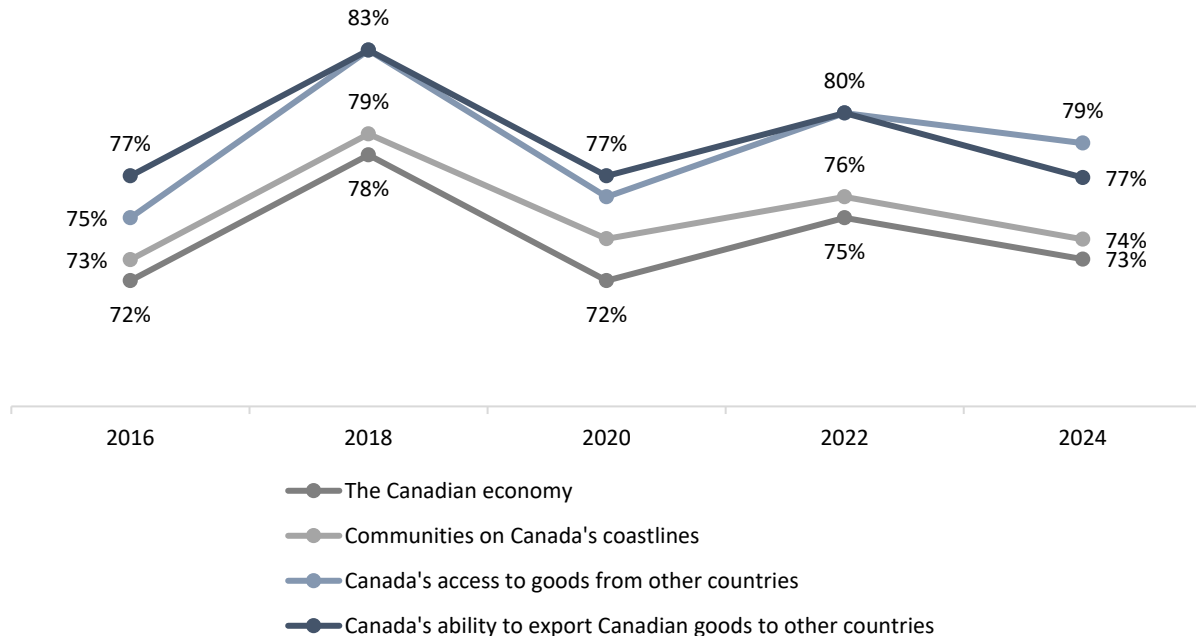
Of all of Canada’s trade with other countries – exports and imports – and including everything from raw commodities to consumer goods, what per cent of Canada’s total trade would you estimate is transported by ship? (Mean guess shown)



Overall, a large majority of Canadians hold a strong belief in the importance of shipping to Canada’s national economy and local communities on Canadian coasts. Approaching three-quarters describe shipping as “critically” or “very important” for Canada’s economy, cities and towns along Canada’s shores, Canadians’ access to international goods, and Canada’s ability to export its own goods outside of its borders. These figures have been within 72 and 83 per cent since 2016.

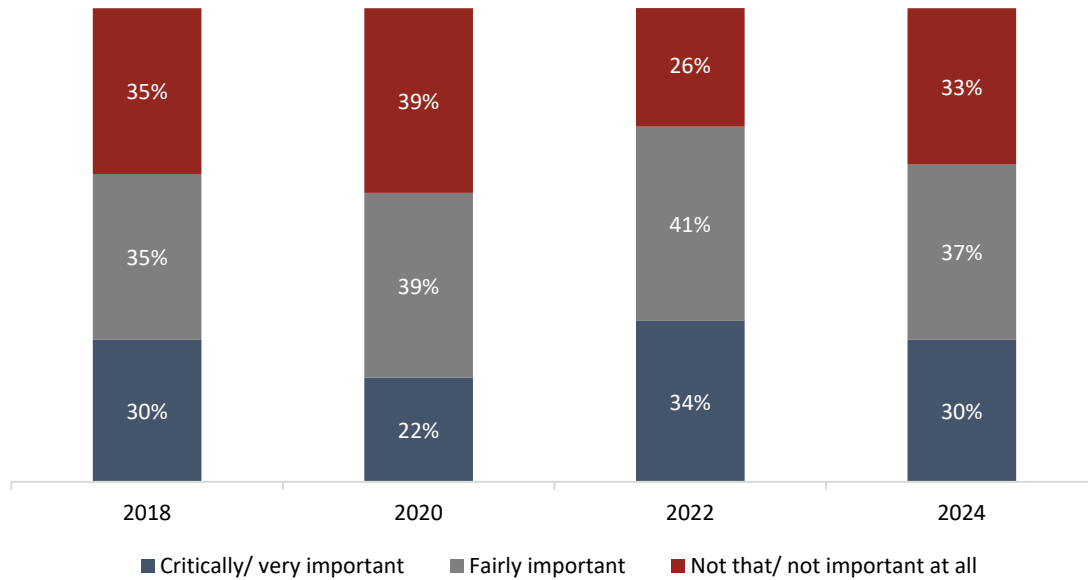
Notably, those living in Quebec are less likely than others to describe shipping as “critically” or “very” important to all four measures. Three-in-five (58%) Quebecers believe marine shipping is “critically” or “very” important to coastal communities, much lower than the national average ([see detailed tables](#)).

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



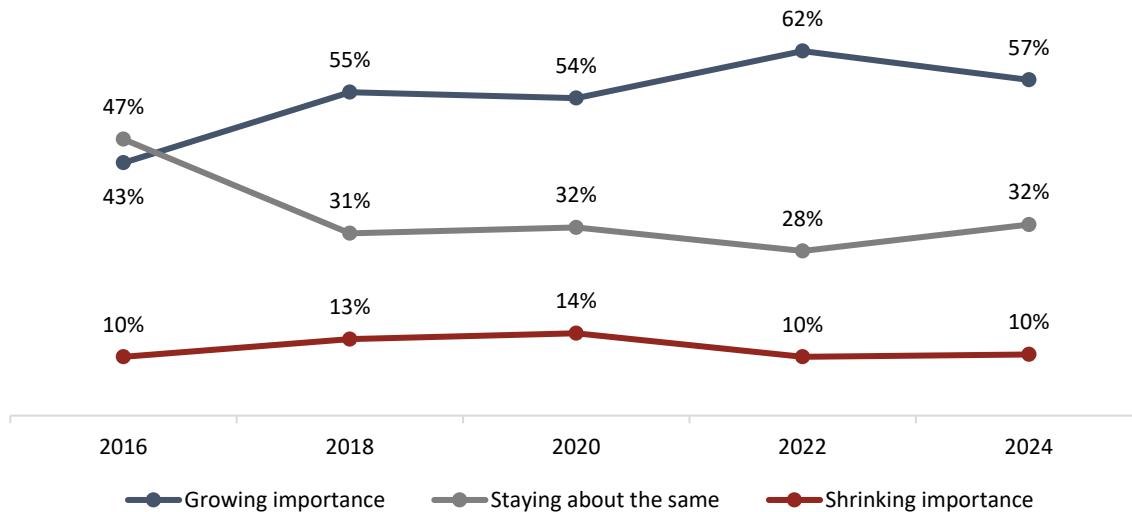
Though a majority of Canadians believe in the importance of shipping to Canada’s economy, there is less certainty when it comes to assessing the importance of marine shipping to their own day-to-day lives. Three-in-ten (30%) believe it to be “critically” or “very important”, but the largest group – two-in-five (37%) – describe it as only “fairly” important. One-third (33%) are more dismissive, describing shipping as not important to their daily lives. The latter group has grown from two years ago, when supply chain problems – especially those related to marine shipping – were more prominently featured in the news:

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



Overall, however, the belief among Canadians is that shipping is growing in importance. Three-in-five (57%) say this, more than six times the number (10%) who instead believe shipping has become less important over the past two decades. One-third (32%) believe it is staying as important as it was two decades ago. Apart from in 2016, between 55 per cent and 62 per cent of Canadians have said they believed shipping was growing in importance each time ARI and Clear Seas have conducted this study:

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?



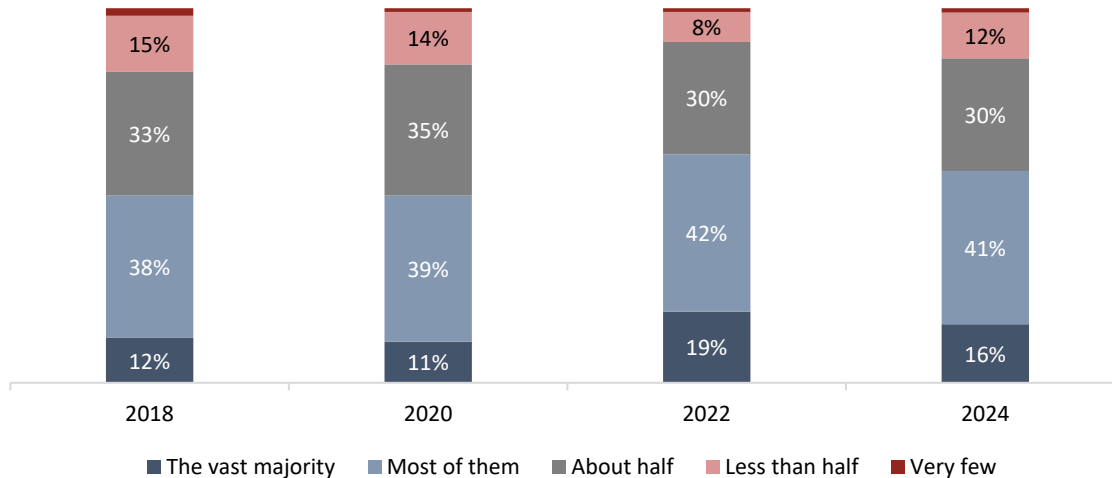
Three-in-five (62%) in Atlantic Canada describe shipping’s importance as increasing, the highest in the country. Manitobans are the most likely to believe shipping’s importance has stayed about the same (39%, [see detailed tables](#)).

Supply chain issues and awareness

Inflation has been a high concern for Canadians since 2022. That year saw a rising cost of living unseen in Canada since the 1980s. Supply chain snarls played [a key role in raising the cost of many items](#) in Canadians’ day-to-day lives.

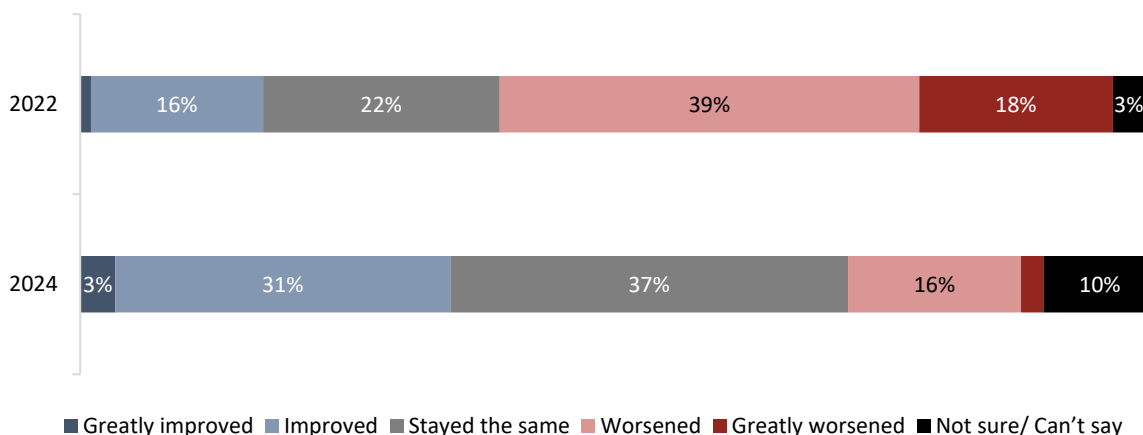
It also perhaps contributed to raising Canadians’ awareness of the role marine shipping plays in their day-to-day lives. In 2020, half (50%) of Canadians believed most of the items they use on a daily basis were transported by ship. Now it is three-in-five (57%) [who identify](#) that is the case.

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?



Some of the supply chain issues of the past two years have eased but have also been replaced by other concerns. Twice as many Canadians say they have noticed an improvement (34%) as say instead supply chain issues have worsened (17%). However, half (49%) say they have been affected by a supply chain issue in the past six months, either at home or at work. Those in the prairie provinces of Alberta (57%), Saskatchewan (62%) and Manitoba (56%) are most likely to report personally experiencing supply chain issues ([see detailed tables](#)).

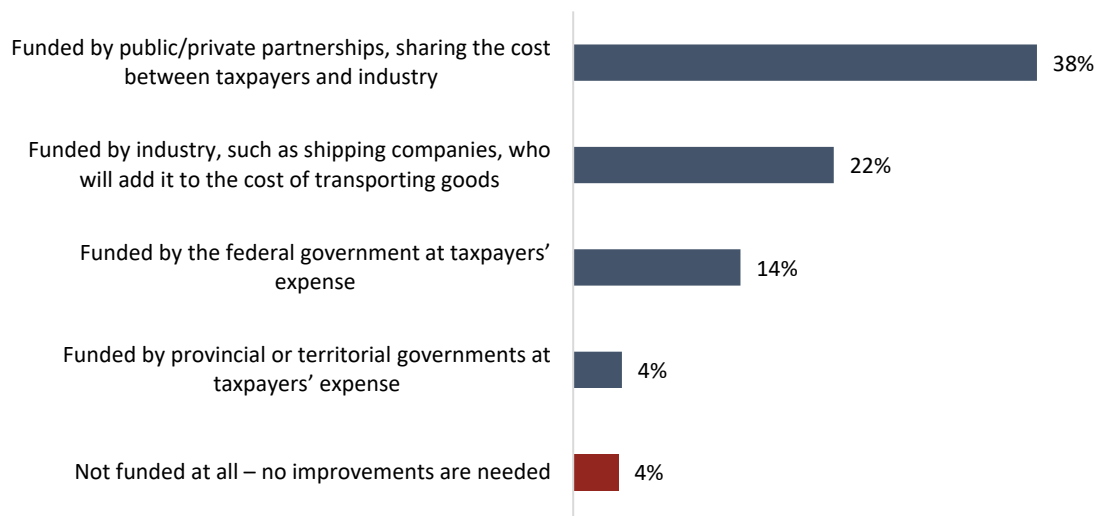
In your opinion, have supply chain issues improved, worsened or stayed the same in recent months?



Given the number of people affected by supply chain issues, it is perhaps unsurprising that only four per cent of Canadians believe no supply chain improvements are needed. Two-in-five (38%) believe supply

chain improvements should be funded by public-private partnerships. Equal sized groups of one-in-five (22%) say it should only be the responsibility of shipping companies to improve supply chain infrastructure or believe it should fall to provincial and territorial governments or the federal government (18%):

Do you believe improvements to Canada's maritime supply chains should be...
(All respondents, n=1,610)



Views on maritime careers

With an estimated [43 per cent of the marine workforce](#) expected to retire within the next decade, Canada's shipping industry faces a potential labour challenge. Canadians believe working in the industry means a long time away from family (55%), and long hours and hard work (48%). There is also a widespread perception that most of the jobs are at sea (41%), but that brings the potential excitement of seeing the world by boat for one-quarter (25%). Canadians are more likely to believe the industry offers good pay and benefits (25%) than not (11% [see detailed tables](#)).

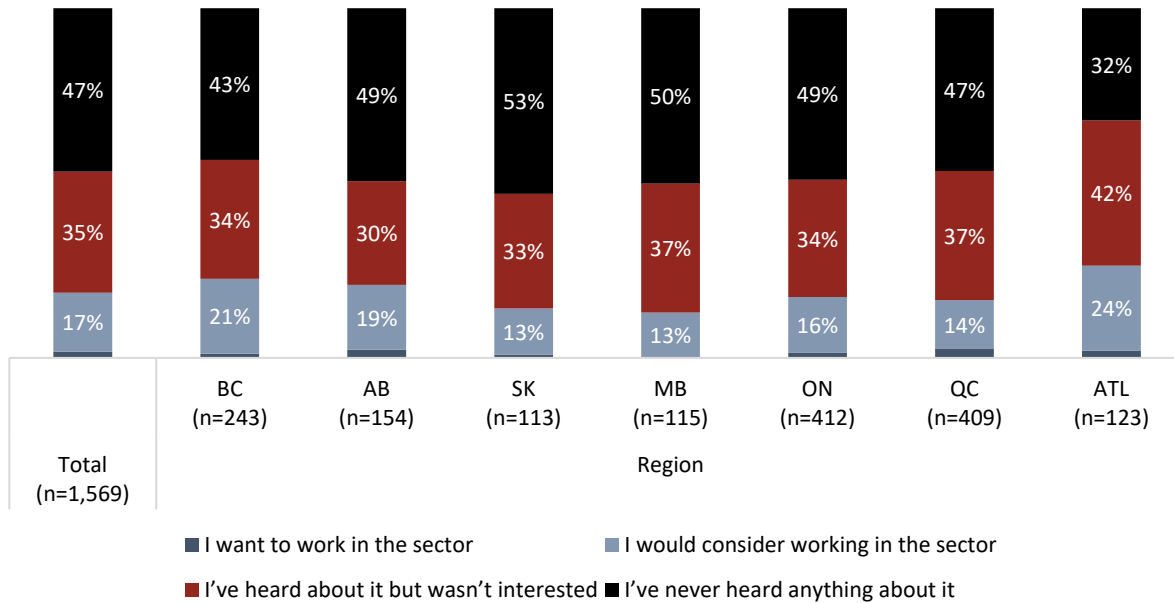
Currently, one-quarter (24%) say they know someone who works in the industry, with those in Atlantic Canada leading the way. Half (48%) in that region of the country are connected to someone who works in the marine sector, reflecting the importance of marine shipping to Canada's east coast.

There is interest, generally, in working in the marine sector. One-in-five (19%) who aren't currently working in shipping say they either want to or would consider working in the sector. Interest is higher in Atlantic Canada (26%) and B.C. (22%), with one-in-five (21%) in Alberta also expressing interest. However, there is a large proportion of Canadians who have not heard anything about careers in the maritime industry. Half (47%) say this.

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**Have you personally ever considered working in the Canadian marine sector?
(Among those who don't currently work in the sector)**



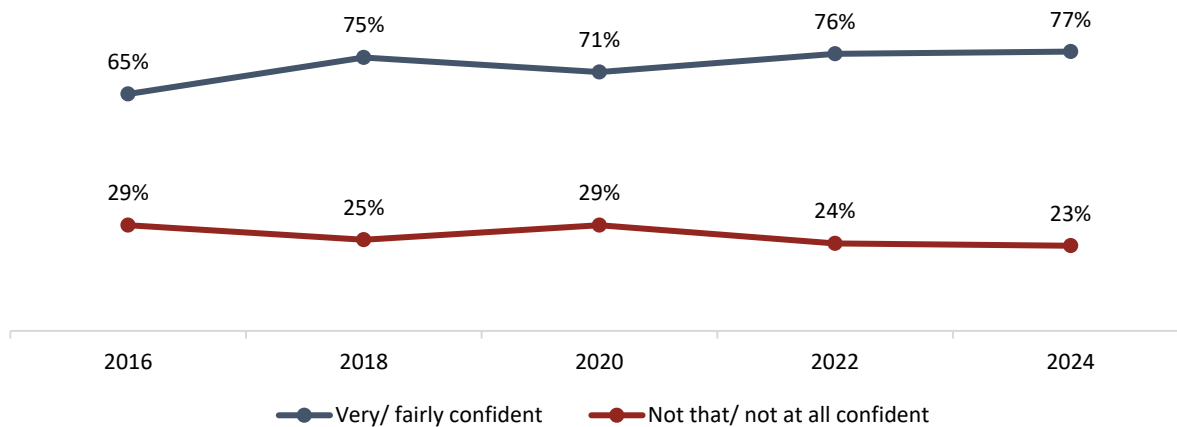
For those who have considered working in the Canadian marine sector, the most common concern is work-life balance and time away from family (39%). There is also a sizable minority who believe their skills won't fit in the sector (33%). A lack of information about career paths in this sector is also selected highly (29%).

One-in-five (18%) also say they have no convenient access to training – a concern that is higher in areas further away from the east and west coastlines ([see detailed tables](#)).

Part Two: Views on shipping regulation

Since 2018, at least seven-in-ten Canadians say they are “very” or “fairly” confident in the rules and regulations that govern marine shipping in Canadian waters. Currently those that express confidence (77%) outnumber those say they are “not that confident” or “not confident at all” by three-to-one. Those living in Quebec (28%) are the most likely to be in the latter group, while confidence is highest in Saskatchewan (85%), Alberta (81%) and Atlantic Canada (80%, [see detailed tables](#)).

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



Most also believe the Canadian Coast Guard (73%), port and harbour authorities (63%) and the shipping industry (59%) are doing a good job contributing to safe shipping in Canadian waters. Provincial governments (51%) and federal departments (53%) also are praised by a slim majority. The federal government overall (34%) is the most likely to be viewed as doing a poor job, though there are one-in-five (20%) who say they don’t know enough to render judgement on it.

Assessments of these various bodies have remained consistent over the years:

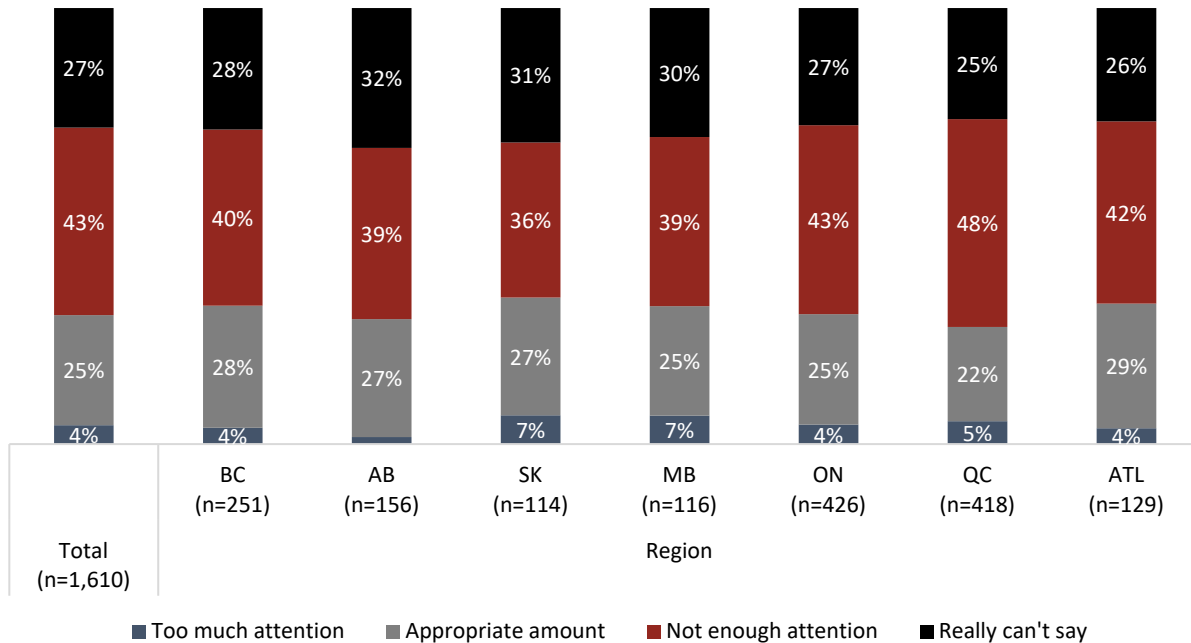
Would you say each of the following are doing a good job or bad job in terms of their contribution towards safe shipping in Canadian waters today? (Percentage selecting 'good' or 'very good' job shown)					
	Year				
	2016	2018	2020	2022	2024
The Canadian Coast Guard*	-	-	77%	69%	73%
Canada's port and harbour authorities	66%	76%	70%	62%	63%
The shipping industry	64%	71%	62%	59%	59%
Provincial/ territorial governments	62%	52%	52%	49%	51%
Specific federal departments*	67%	67%	57%	49%	53%
The federal government overall	64%	52%	47%	44%	44%
The International Maritime Organization	58%	51%	44%	41%	43%

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

However, perhaps in contradiction to the confidence Canadians express in the rules and regulations above, two-in-five (43%) say marine shipping safety does not receive enough attention from the government. Three-in-ten (29%) disagree, either believing it receives the appropriate amount of (25%) or too much (4%) attention.

Half (48%) of Quebecers believe governments should focus more on shipping safety, the highest proportion in the country. This is perhaps related to the less confidence they have in the safety of shipping in Canadian waters more generally as noted above.

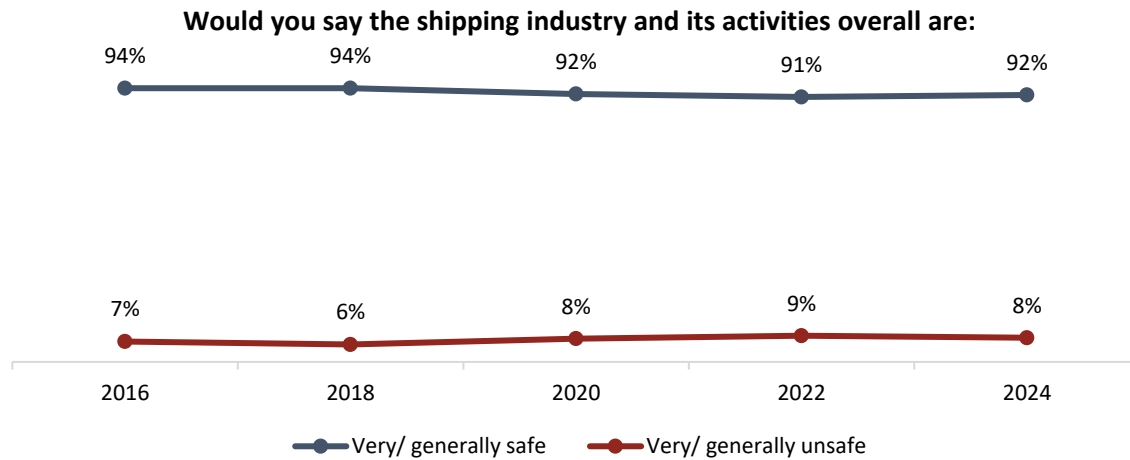
Do you think this area of marine shipping safety receives the appropriate amount of attention (oversight and enforcement) from government in terms of the safety policies and procedures in place?



■ Too much attention ■ Appropriate amount ■ Not enough attention ■ Really can't say

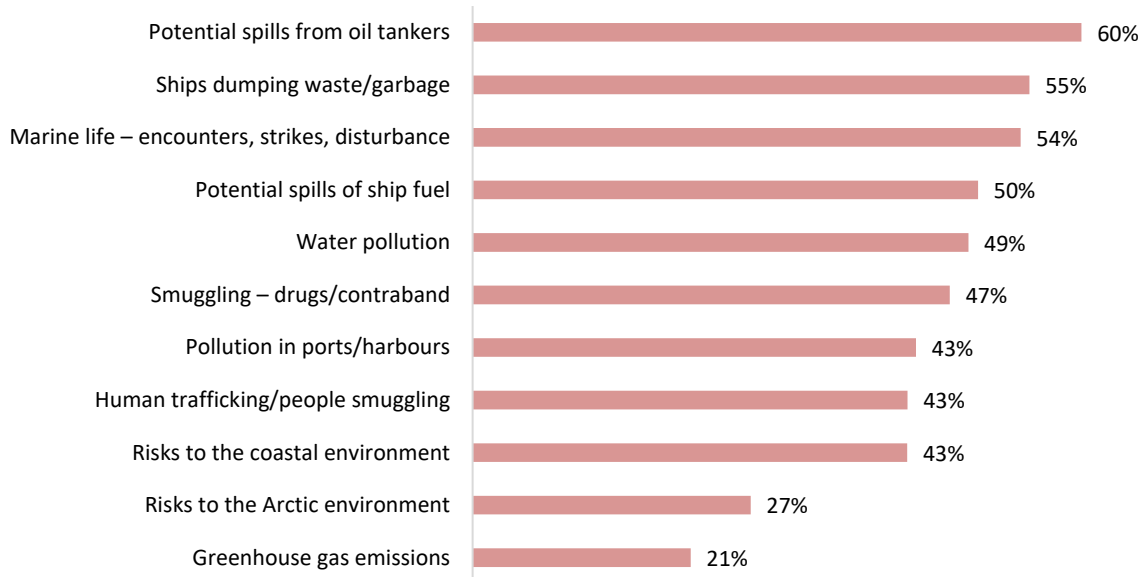
Part Three: Safety, the environment and marine shipping

Overwhelmingly and consistently, the impression from Canadians is that the shipping industry is “very” or “generally” safe. At least nine-in-ten Canadians have said this since 2016, with fewer than one-in-ten believing instead it is “very” or “generally unsafe”.



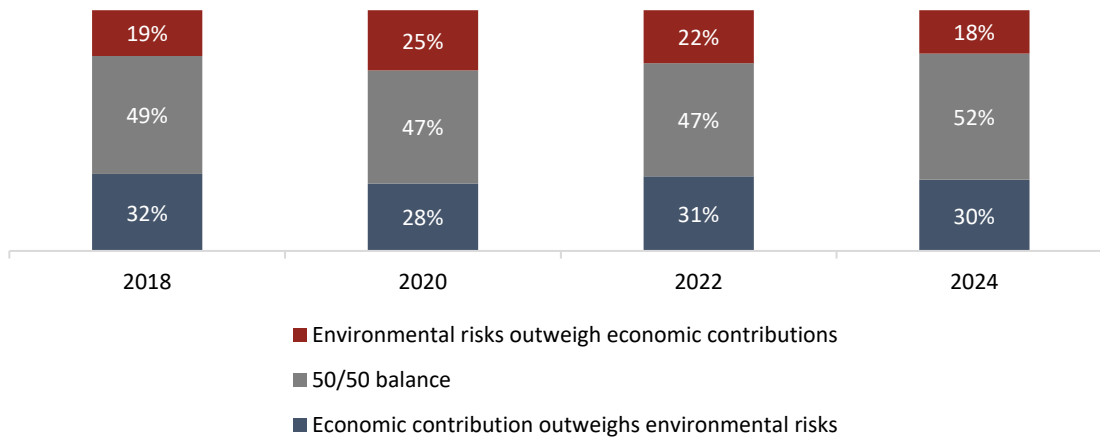
However, there are potential impacts of marine shipping that Canadians are concerned over. At least half, or more, say spills from oil tankers (60%), ships dumping waste (55%), harm to marine life (54%) and spills of ship fuel (50%) are impacts they worry about. Potential oil and fuel spills have been top of mind for Canadians over the years, including in [2018](#), [2020](#) and [2022](#). Concern about smuggling (47%) is up nine percentage points since 2022 (38%).

**What are the impacts of marine shipping that come to your mind when you think about shipping in Canadian waters?
(Those selected by 20% or more overall shown; all respondents, n=1,610)**



For the first time, more than half (52%) of Canadians weigh the economic contributions of shipping as balanced against the environmental risks. Those in Manitoba (39%) and Saskatchewan (36%) are most likely to view the economic contributions of shipping as outweighing the environment risks it might present, while those in Ontario (21%) and Quebec (20%) are the most likely to believe the environmental risks outweigh the economic benefits of shipping ([see detailed tables](#)).

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



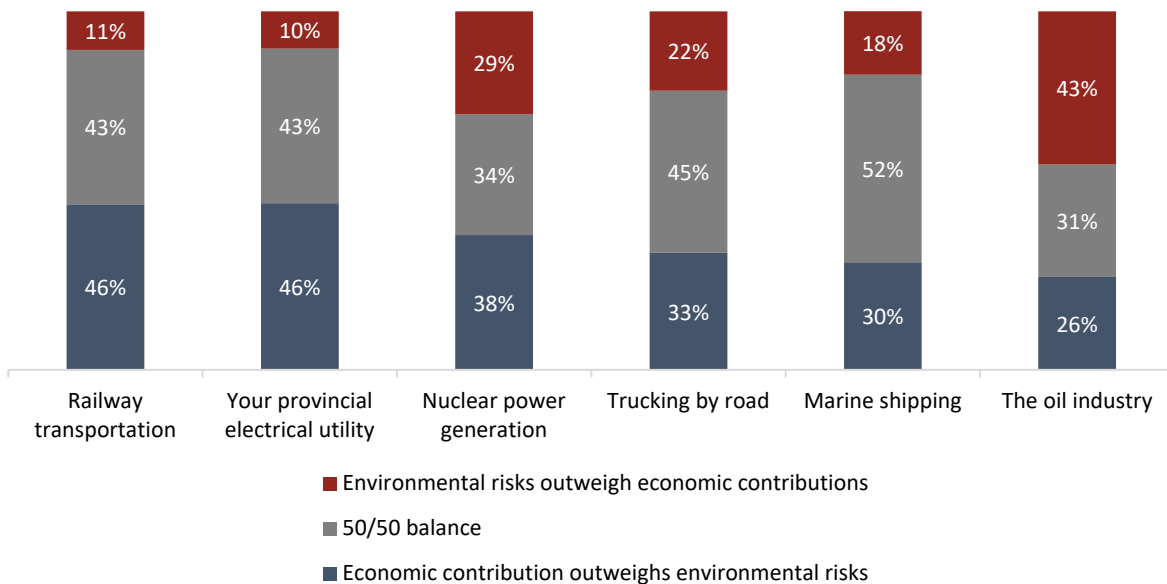
ARI and Clear Seas have asked Canadians to consider the balance of economic benefits and environmental risks of various other sectors – railway transportation, trucking by road, electricity utilities

and the oil industry – as a comparison over the years. This year, nuclear power was included for the first time. For nuclear power production, more Canadians (38%) believe the economic contributions outweigh the environmental risks than vice versa (29%), but it is more polarizing than perhaps all but the oil industry. In both cases, a group of one-third believe there to be a 50/50 balance. For other sectors, there are many more Canadians who believe there is an equilibrium between economic benefit and environmental risk.

Canadians offer varying assessments of their electrical utilities which likely has a lot to do with the source of electrical power. People in Manitoba – which generates nearly all of its electricity from hydropower – are the most likely to say the economic contributions of their utilities outweigh the environmental risks. Albertans, with the bulk of electricity via natural gas, are the least likely to say this. The Atlantic Canadian average is also low, but there is a wide discrepancy in the power sources from province to province in Atlantic Canada. For example, Nova Scotia, the largest province in the region by population, generates most of its power via coal.

Overall, when it comes to the environmental risks of different industries, those living in Quebec have higher levels of concern about the oil industry (53%) and nuclear power (46%) than those elsewhere in the country (see detailed tables).

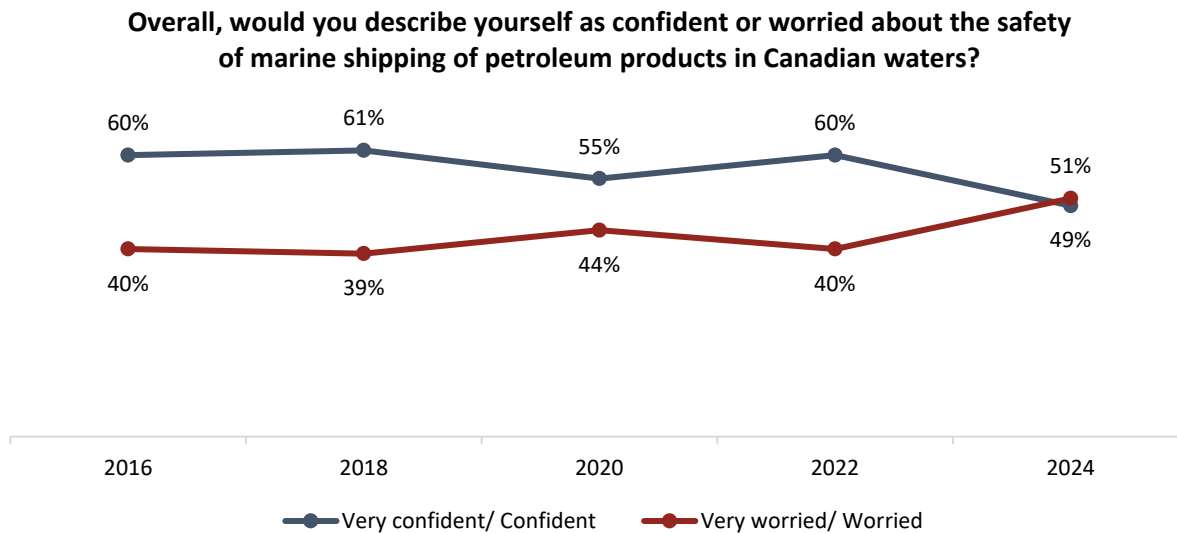
**How would you best describe the economic contribution of these Canadian industries against their potential environmental risks?
(All respondents, n=1,610)**



Safety of LNG, hydrogen, increased oil tanker traffic

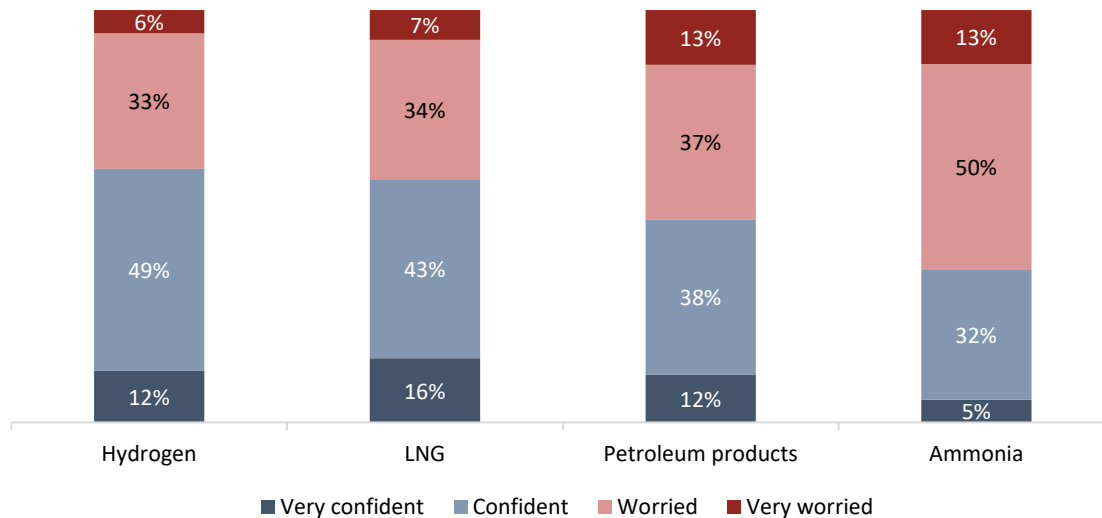
The shipping of petroleum products is of particular concern for Canadians, with oil spills specifically a high concern when Canadians think of the potential impacts of the shipping industry, as noted above.

In previous editions of this report, the Trans Mountain Pipeline Expansion was still in development. The expansion has been completed and oil shipments off of Canada’s Pacific coast have increased significantly. To assess whether this had affected Canadians’ opinions on safety of shipping oil and gas, this increased tanker traffic was noted in this year’s question (see questionnaire). Half (51%) of Canadians say they are worried about the safety of shipping petroleum products in Canadian waters, an increase from previous years:



Comparatively, Canadians are less worried about the potential shipping of hydrogen (39%) or liquefied natural gas (41%) than petroleum products such as oil but are much more concerned with the potential for the shipping of ammonia in Canadian waters (63%). Ammonia is viewed as a potential lower carbon fuel source for the shipping industry, but is also a well-known hazardous material.

**Would you describe yourself as confident or worried about the safety of marine shipping of the following in Canadian waters?
(All respondents, n=1,610)**

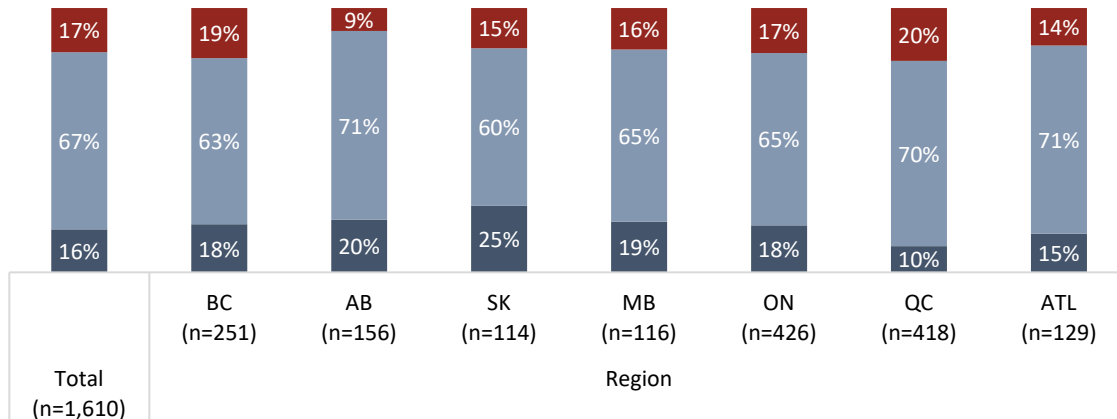


Decarbonization

There is [a global push for decarbonization in the shipping industry](#) as the world fights climate change and moves towards a lower carbon economy. Ammonia and liquid hydrogen are potential fuels of the future for the industry but require renewable energy sources to be considered true zero-carbon fuels. Currently, Canada’s hydrogen production is in the early stages, with a single low-emissions hydrogen plant in Quebec, [but additional projects planned in the four Atlantic provinces, Ontario, Manitoba, Alberta and B.C.](#) Alberta is currently the largest producer of hydrogen in the country, but [the bulk of it is produced with natural gas and used for upgrading and refining heavy oil.](#)

Two-thirds (67%) of Canadians would prioritize the use of potential green or clean hydrogen to decarbonize domestic industries, including shipping. Similar-sized groups say either Canada should primarily export hydrogen (16%) or not invest in hydrogen at all (17%). Albertans are least likely to be in the latter group (9%), while those in Saskatchewan (25%) are most likely to say Canada should prioritize exporting hydrogen. One-in-five in Quebec (20%) and B.C. (19%) believe Canada shouldn’t invest in hydrogen, the most in the country:

In your opinion, should Canada prioritize the use of green hydrogen domestically to decarbonize its own industries, including shipping, or export hydrogen to other countries, or neither?



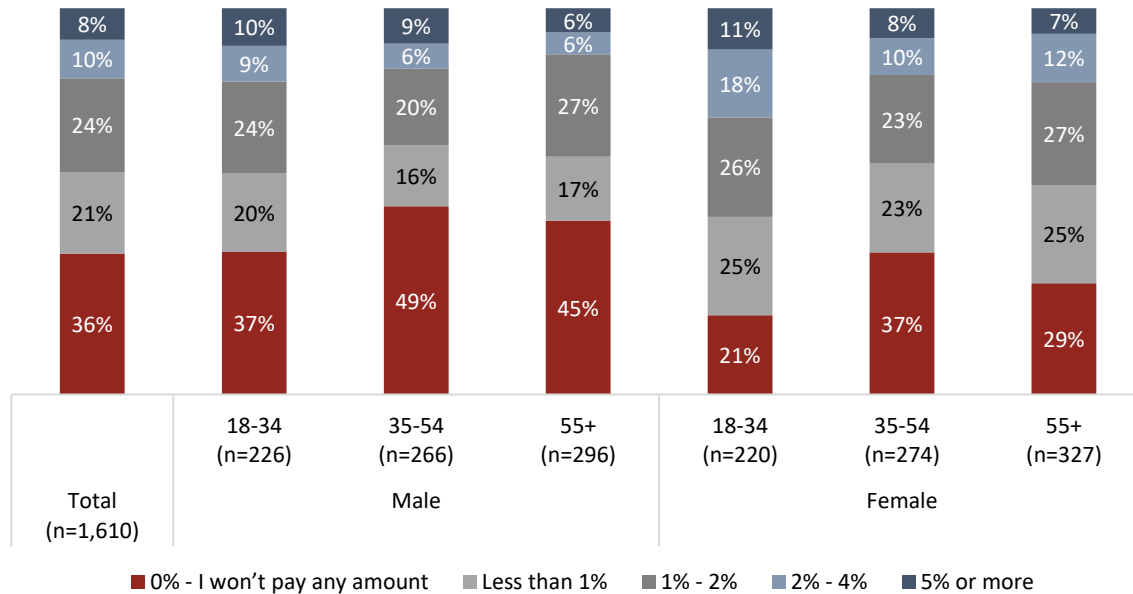
- Neither – Canada shouldn't invest in hydrogen at all
- Produce hydrogen primarily to decarbonize domestic industries, including shipping
- Produce hydrogen primarily to export it to other countries

Decarbonization of the shipping industry could come at a tremendous cost. The United Nations Trade and Development organization estimates that it will cost between \$8 billion and \$28 billion annually to decarbonize ships by 2050, and that the cost for infrastructure for completely carbon-neutral fuels could cost more than that. A study by Boston Consulting Group and the Global Financial Markets Association estimates that decarbonizing maritime shipping could cost a premium of 10 per cent to 15 per cent. Consumers would feel the impact of this cost.

One-third (36%) of Canadians say they would not pay any amount to reduce or offset shipping emissions. But that leaves two-thirds (64%) who say they would pay a little more and up to five per cent or more. The bulk of that group – more than two-in-five (45%) say they would pay two per cent or less. These figures are consistent with those seen in 2022.

Men are much more likely to say they wouldn't pay any amount extra to reduce or offset shipping emissions than women. Younger Canadians, especially 18- to 34-year-old women, are more likely to say they will pay more if it means emissions reductions in the shipping industry:

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

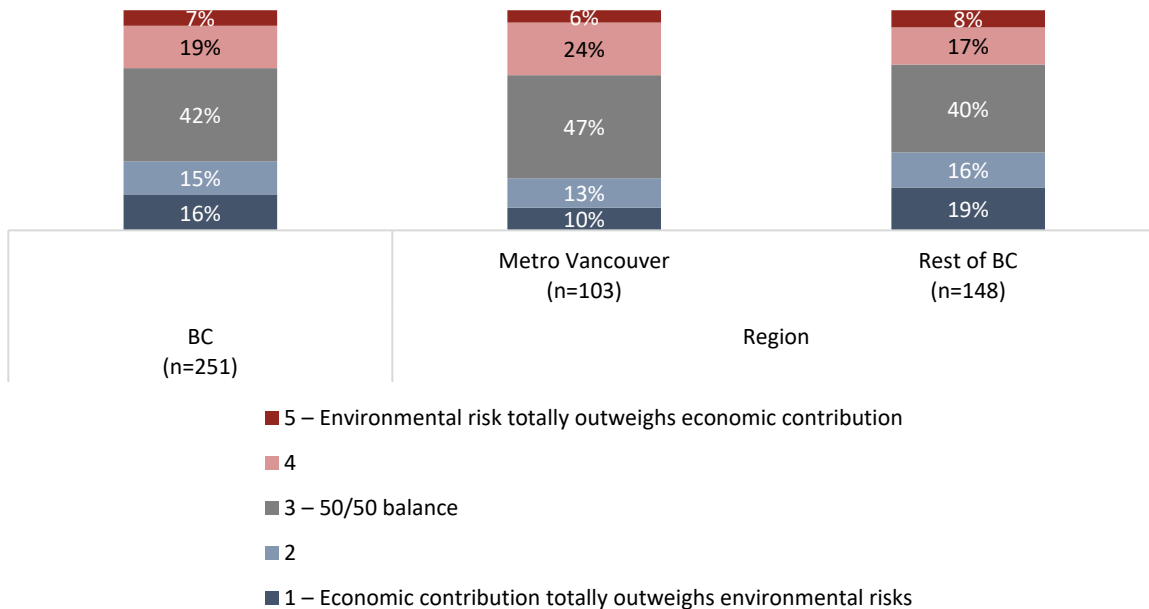


The environmental impact of new terminals in B.C., Quebec

On both of Canada’s coasts, there are projects in the planning stages to expand shipping capacity. These projects both raise potential environmental concerns, though come with the economic benefits that increased shipping activity would bring.

In B.C., the construction of Roberts Bank Terminal 2 would double the container cargo capacity at the Port of Vancouver. This expansion has been approved, but is subject to a court challenge by environmental groups, who argue that the expansion poses a risk to a critical habitat for orcas and salmon. Those in B.C. are slightly more likely (31%) to believe the potential economic benefits of this project outweigh the environmental risks than to say the opposite (26%), while a plurality (42%) believes the project balances both. However, those living in Metro Vancouver are more likely to see the environmental risks outweighing the economic contributions of the project (30%), while those outside of the metro region are more likely to say the potential economic activity is worth the risk (35%):

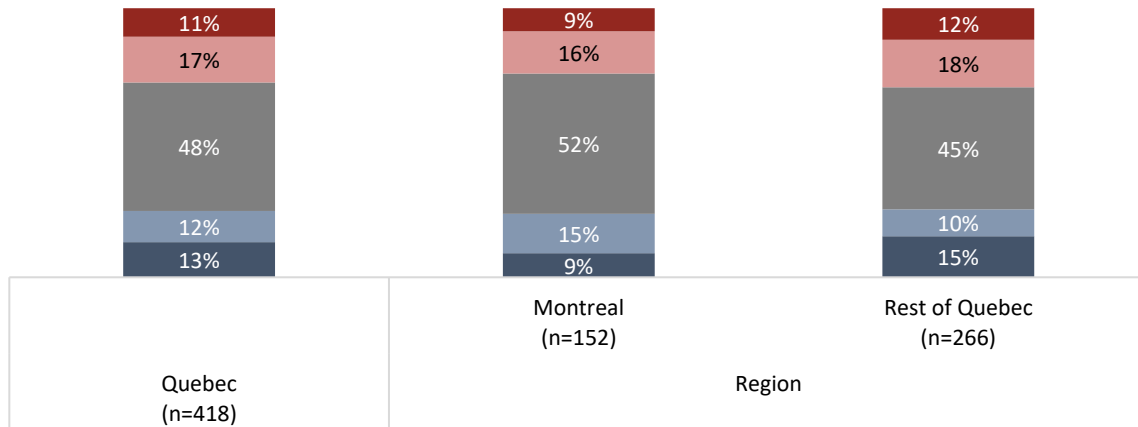
How would you weigh the economic contribution of a large container terminal against the potential environmental risks?



In Quebec, the Port of Montreal, the largest in eastern Canada, is planning its own expansion that is expected to increase container cargo capacity by 60 per cent. The Contrecœur Project has secured federal funding, but has also been the subject of environmental concerns due to the St. Lawrence being home to threatened and endangered species.

Quebecers are divided, with half (48%) believing the project is balanced when it comes to economic contributions vs. environmental risks, and statistically similar groups saying either environmental risks (28%) or economic contributions (25%) outweigh the other:

How would you weigh the economic contribution of a large container terminal against the potential environmental risks?



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

Part Four: Shipping Confidence Index

Since 2020, ARI and Clear Seas have calculated a Shipping Confidence Index, which analyzes respondents’ views on shipping safety and regulation and the relative importance of the industry to the economy.

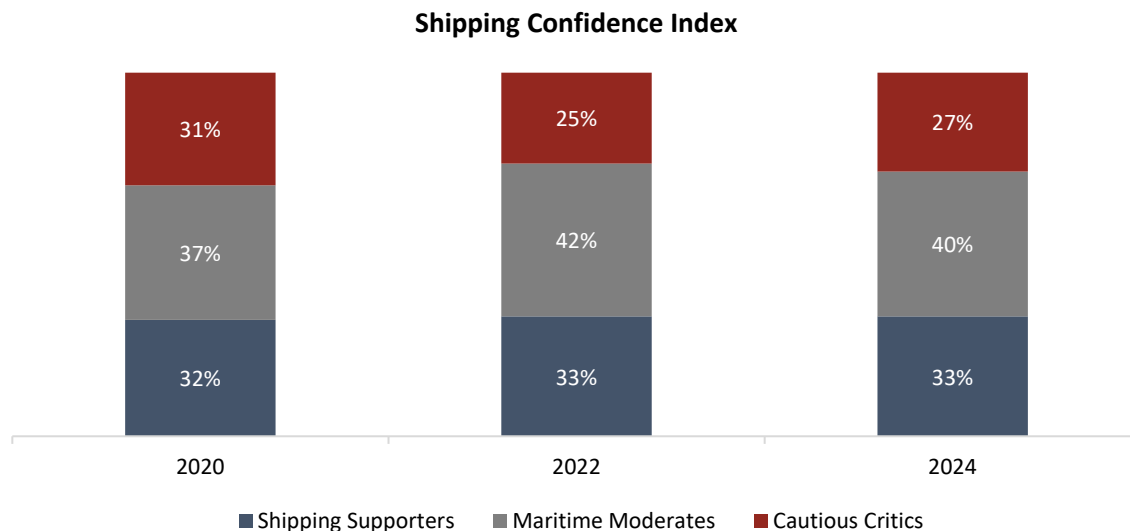
This index is comprised of three groups: **Shipping Supporters**, **Maritime Moderates**, and **Cautious Critics**.

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 (40%), 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.

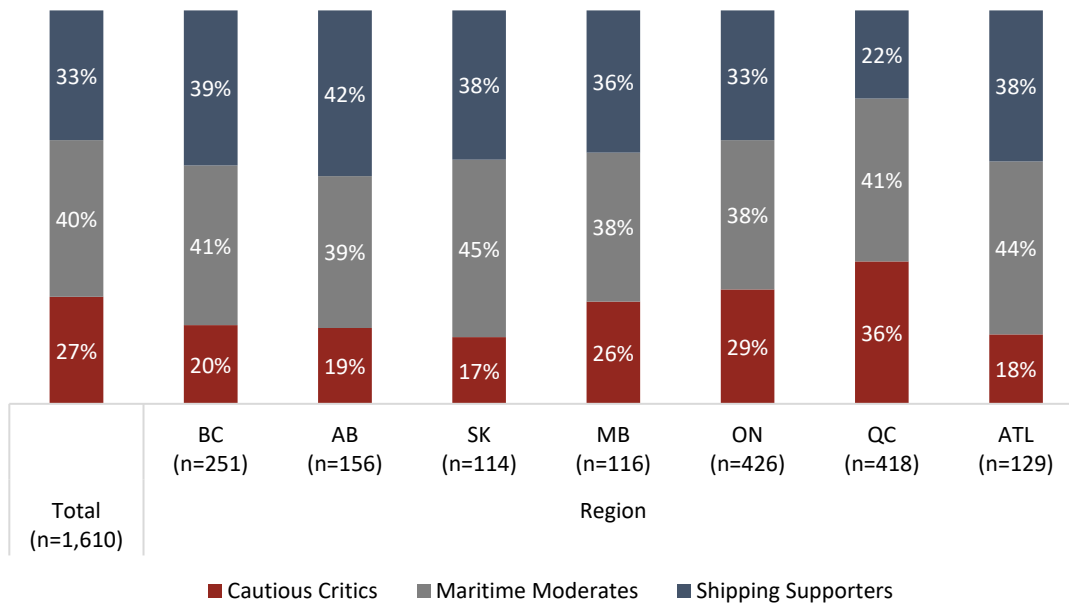
Of the three groups, **Cautious Critics** (27%) express the highest rates of skepticism when it comes to the importance of the industry and its overall safety. This group is also defined by high levels of concern related to the environmental risks of the industry.

The size of the Shipping Supporters group has been consistent since 2020, while the Cautious Critics peaked in size in 2020 and has since shrank to around one-quarter in 2022 and 2024:



Since 2020, there have been a larger proportion of Cautious Critics in Quebec than elsewhere in the country (2020: 42%, 2022: 32%). B.C., too, has typically included more Cautious Critics than elsewhere, but now only one-in-five (20%) in that province fall in that category, putting it in line with Atlantic Canada (18%), Alberta (19%) and Saskatchewan (17%).

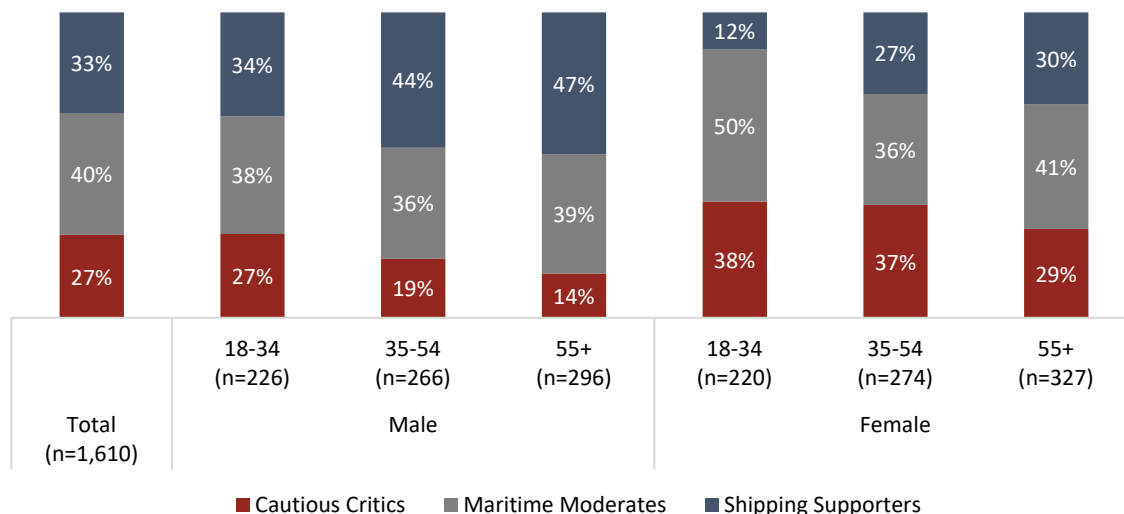
Shipping Confidence Index



Women are much more likely than men to be Cautious Critics of maritime shipping. Women select terms at higher rates than men such as “polluting” (25% women, 16% men) and “risky” (12% women, 5% men) when they think of shipping. As well, they are much more likely to say they have a generally negative image of shipping than men overall (23% women, 13% men, [see detailed tables](#)).

Men, meanwhile, find themselves much more likely to be Shipping Supporters as they are more likely to view shipping as “critically important” to the Canadian economy (36% men, 22% women), coastal communities (32% men, 24% women), Canada’s access to international goods (42% men, 25% women), and Canada’s exports (42% men, 25% women, [see detailed tables](#)).

Shipping Confidence Index



Notes on Index 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](#).

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