

Survey Summary Report

While the marine transportation system is much more likely to be considered safe than unsafe, many Canadians are unsure or neutral in their views. Independent pilots seen as an important element in ensuring the system's safety.

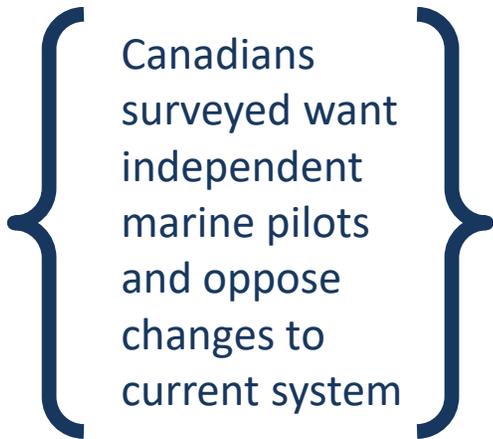
Ten riding survey study submitted by Nanos to the Canadian Marine Pilots Association, August 2018
(Submission 2018-840)



CANADIAN
MARINE
PILOTS'
ASSOCIATION



Summary



Canadians surveyed want independent marine pilots and oppose changes to current system

Nanos was retained to conduct a survey of 1000 respondents in 10 federal ridings with marine waterways. The key findings of the study are as follows.

- **Safety Perception** - Canadians in the waterways surveyed are ten times more likely to rate marine transportation safety as being high rather than a low. Of note, more than one in five shared a neutral score or are unsure about marine transportation safety.
- **Marine Pilots** – A strong majority of Canadians who participated in the study believe a situation where marine pilots exercise judgement without shipowner influence is best for keeping Canada’s waterways safe. Likewise, a very strong majority of Canadians believe the current system where pilots are free from shipowner influence should be maintained.
- **Banning Dangerous Cargo** - If marine pilots were not completely independent from shipowner influence Canadians surveyed were twice as likely to prefer banning vessels carrying dangerous cargo compared to limiting the size of vessels transiting waterways.

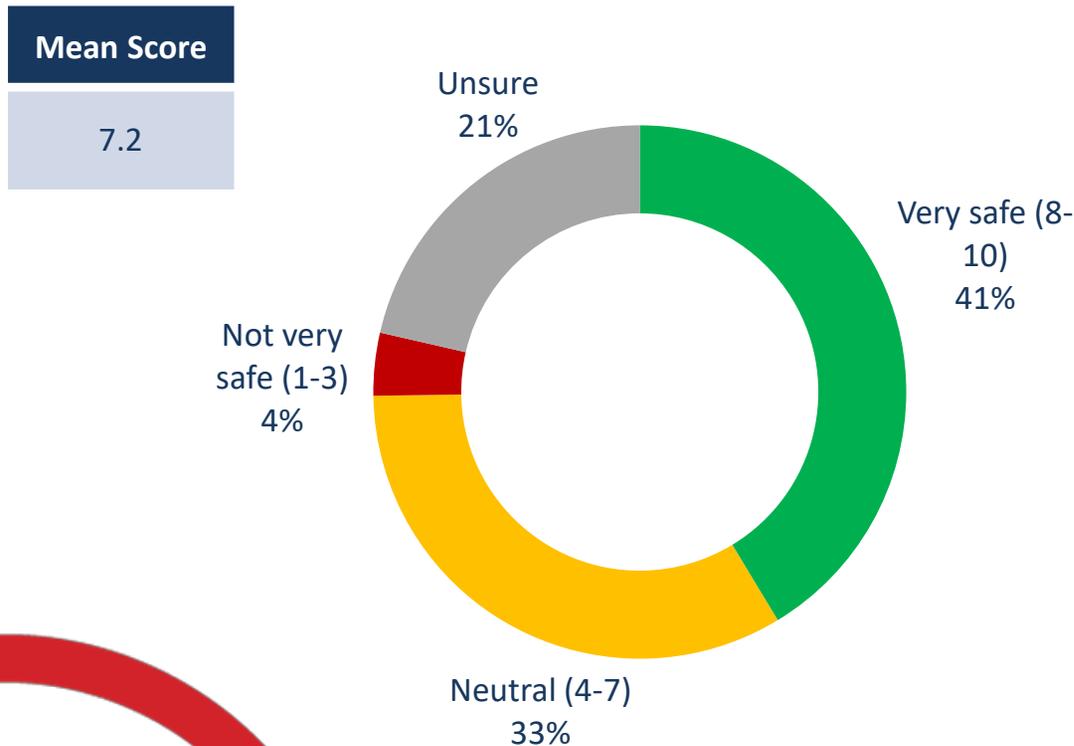
The attached summary of the detailed results includes all the questions asked in the order the questions were presented to respondents.

These observations are based on a Nanos RDD dual frame (land- and cell-lines) random telephone survey of 1,000 Canadians in ten federal ridings (100 Canadians from each riding), 18 years of age or older, conducted between August 17th and 26th, 2018. Participants were randomly recruited by telephone using live agents and administered a survey. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

This study was commissioned by the Canadian Marine Pilots Association and the research was conducted by Nanos Research.

Safety of vessels in Canadian waters

Source: Nanos Research, RDD dual frame telephone random survey, August 17th to 26th, 2018, 2018, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Ridings	Mean Score
Fundy Royal, NB (n=100)	7.1
Niagara Centre, ON (n=100)	7.4
Louis-Hébert, QC (n=100)	7.2
Montmagny, QC (n=100)	7.5
Québec, QC (n=100)	7.2
Trois-Rivières, QC (n=100)	7.2
Burnaby North, BC (n=100)	7.1
Burnaby South, BC (n=100)	7.1
Coquitlam-Port Coquitlam, BC (n=100)	6.9
Richmond Centre, BC (n=100)	7.4

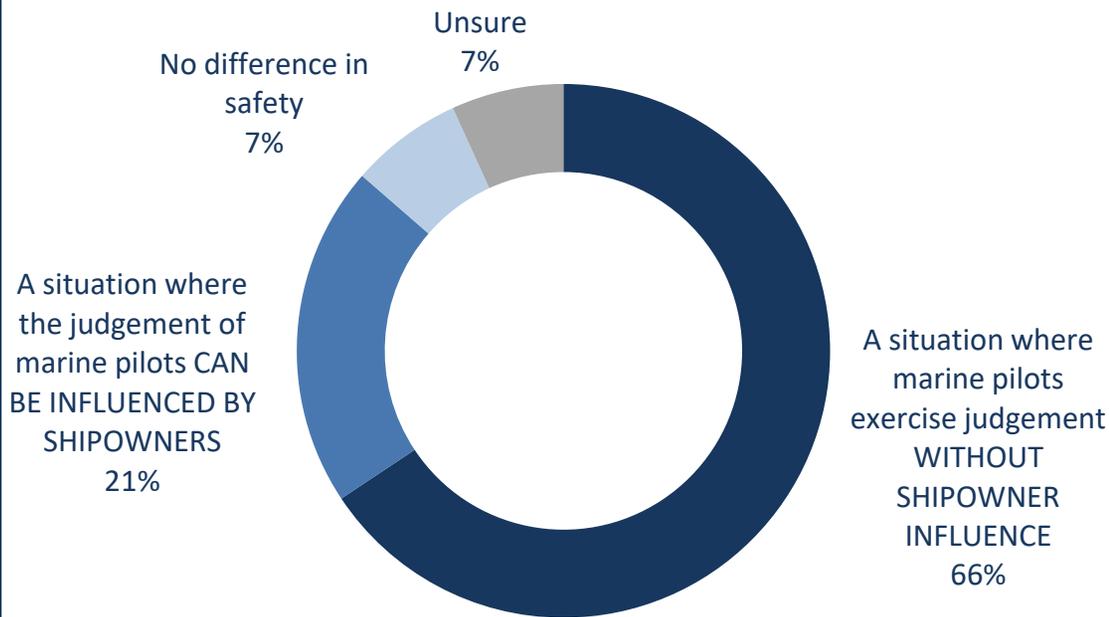
*Weighted to the true population proportion.

***Note: Charts may not add up to 100 due to rounding**

QUESTION – On a scale of 1 to 10, where 1 is not safe at all and 10 is very safe, how would you rate the safety of cargo, tanker and passenger vessels in Canadian waters?

How to best keep Canadian waters safe

Source: Nanos Research, RDD dual frame telephone random survey, August 17th to 26th, 2018, 2018, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Ridings	Without shipowner influence
Fundy Royal, NB (n=100)	55.9%
Niagara Centre, ON (n=100)	61.5%
Louis-Hébert, QC (n=100)	74.0%
Montmagny, QC (n=100)	76.6%
Québec, QC (n=100)	80.5%
Trois-Rivières, QC (n=100)	66.6%
Burnaby North, BC (n=100)	58.7%
Burnaby South, BC (n=100)	59.6%
Coquitlam-Port Coquitlam, BC (n=100)	63.1%
Richmond Centre, BC (n=100)	59.9%

*Weighted to the true population proportion.

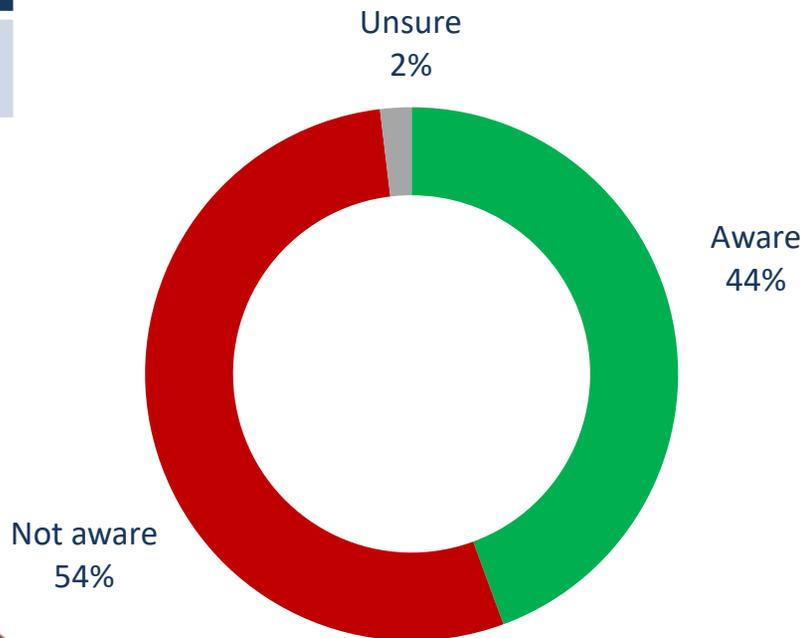
***Note: Charts may not add up to 100 due to rounding**

QUESTION –Marine pilots are professionals who use their knowledge of local waters to safely guide vessels to their destination. When pilotage services are required, marine pilots are dispatched to meet and board vessels as they enter designated compulsory pilotage areas. Once onboard the ship, they go to the vessel's bridge area where the marine pilot will stay, safely guiding the vessel. Which of the following two statements best reflects your personal view about what is best for keeping Canada's waterways safe? [ROTATE]

Awareness of responsibility of marine pilots

Source: Nanos Research, RDD dual frame telephone random survey, August 17th to 26th, 2018, 2018, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-9.3



Ridings	Not aware
Fundy Royal, NB (n=100)	56.5%
Niagara Centre, ON (n=100)	52.9%
Louis-Hébert, QC (n=100)	52.0%
Montmagny, QC (n=100)	49.2%
Québec, QC (n=100)	46.2%
Trois-Rivières, QC (n=100)	58.5%
Burnaby North, BC (n=100)	45.7%
Burnaby South, BC (n=100)	63.4%
Coquitlam-Port Coquitlam, BC (n=100)	61.8%
Richmond Centre, BC (n=100)	51.2%

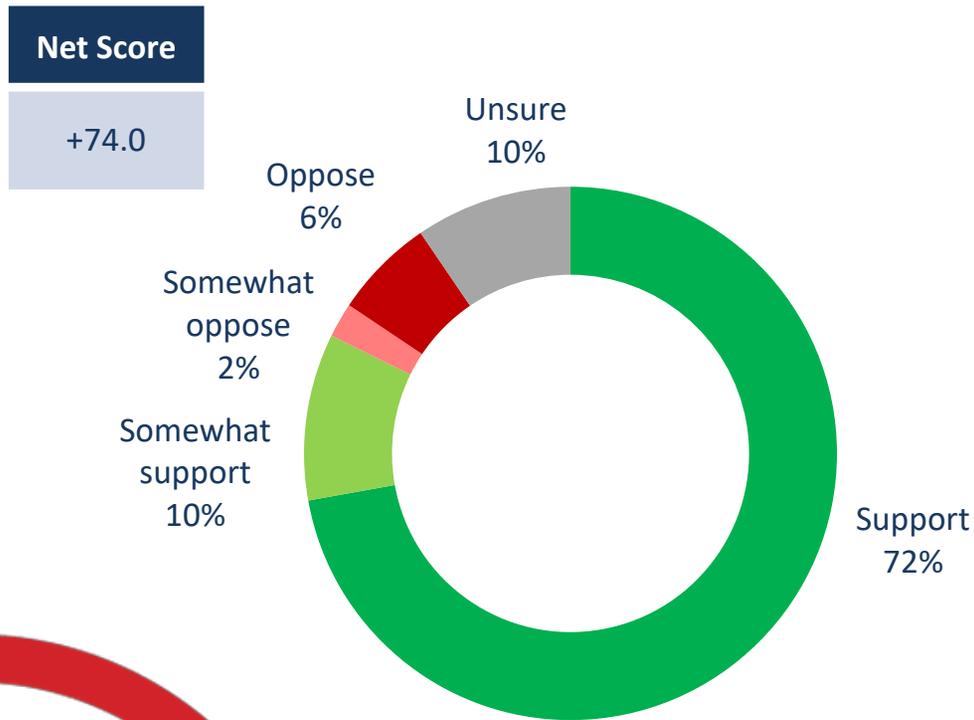
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***Note: Charts may not add up to 100 due to rounding**

QUESTION – Are you aware or not aware that in Canada, marine pilots independent of shipowners are responsible for the safe navigation of vessels like tankers, cruise ships and container ships?

Level of support for current system

Source: Nanos Research, RDD dual frame telephone random survey, August 17th to 26th, 2018, 2018, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Ridings	Support/ Somewhat support
Fundy Royal, NB (n=100)	78.7%
Niagara Centre, ON (n=100)	78.2%
Louis-Hébert, QC (n=100)	86.3%
Montmagny, QC (n=100)	92.2%
Québec, QC (n=100)	92.7%
Trois-Rivières, QC (n=100)	79.4%
Burnaby North, BC (n=100)	80.9%
Burnaby South, BC (n=100)	78.6%
Coquitlam-Port Coquitlam, BC (n=100)	79.9%
Richmond Centre, BC (n=100)	75.6%

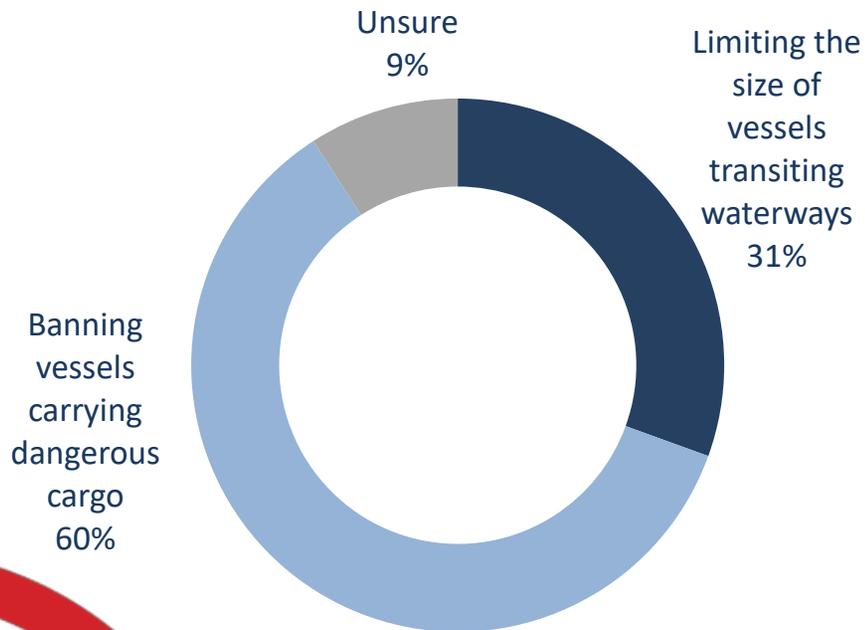
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QUESTION – Do you support, somewhat support, somewhat oppose or oppose maintaining Canada’s current system where marine pilots are free from shipowner influence?

Safety measures beyond independence

Source: Nanos Research, RDD dual frame telephone random survey, August 17th to 26th, 2018, 2018, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.



Ridings	Banning vessels
Fundy Royal, NB (n=100)	43.9%
Niagara Centre, ON (n=100)	52.2%
Louis-Hébert, QC (n=100)	79.6%
Montmagny, QC (n=100)	66.9%
Québec, QC (n=100)	76.6%
Trois-Rivières, QC (n=100)	67.5%
Burnaby North, BC (n=100)	48.8%
Burnaby South, BC (n=100)	43.1%
Coquitlam-Port Coquitlam, BC (n=100)	60.5%
Richmond Centre, BC (n=100)	63.5%

*Weighted to the true population proportion.

***Note: Charts may not add up to 100 due to rounding**

***Asked of one half of the sample, accurate 4.4 percentage points, plus or minus, 19 times out of 20**

QUESTION – If Canada's marine pilots were not independent, what other measures do you think should be in place to keep Canada's waterways safe?

Other safety measures

Source: Nanos Research, RDD dual frame telephone random survey, August 17th to 26th, 2018, 2018, n=500, accurate 4.4 percentage points plus or minus, 19 times out of 20.

	Frequency (n=500)
Can't think of other measures	71.3%
Limiting number of vessels/accessible areas/speed/quantities transported	3.9%
More resources and training	3.9%
Keep system with pilot independence	3.5%
Improve transport ships/use new tech like GPS	3.3%
More government oversight / regulations	3.3%
More safety checks / safety checks by independent body	2.9%
More coastguard stations	1.4%
Accidents can happen anyways/there are many dangers	1.3%
Impose fines/charges/penalties	0.7%
Banning vessels carrying dangerous cargo	0.5%
Limiting the size of vessels transiting waterways	0.1%
Other	3.8%

*Asked of one half of the sample, accurate 4.4 percentage points, plus or minus, 19 times out of 20

QUESTION – Are there any other measures you can think of? Please specify. [Open-ended]



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) random telephone survey of 1,000 Canadians 18 years of age or older, between August 17th and 26th, 2018 in ten federal ridings (100 Canadians from each of the following ridings):

- Burnaby South
- Coquitlam – Port Coquitlam
- Richmond Centre
- Burnaby North – Seymour
- Québec
- Montmagny
- Trois-Rivières
- Louis-Hébert
- Fundy Royal
- Niagara Centre

Participants were randomly recruited by telephone using live agents and administered a survey.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 respondents is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by the Canadian Marine Pilots Association and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Canadian Marine Pilots Association	Weighting of Data	The results were weighted by age and gender using the latest Census information (2016) for each riding. See tables for full weighting disclosure.
Final Sample Size	1,000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) random telephone survey	Stratification	By age and gender using the latest Census information (2016) and the sample consists of 100 Canadians from each of the ten following ridings: Burnaby South, Coquitlam – Port Coquitlam, Richmond Centre, Burnaby North – Seymour, Québec, Montmagny, Trois-Rivières, Louis-Hébert, Fundy Royal, Niagara Centre.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	Seven percent, consistent with industry norms.
Demographics (Captured)	Burnaby South; Coquitlam – Port Coquitlam; Richmond Centre; Burnaby North – Seymour; Québec; Montmagny; Trois-Rivières; Louis-Hébert; Fundy Royal; Niagara Centre; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	All questions asked are contained in the report.
Number of Calls	Maximum of five call backs.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Survey Company	Nanos Research
Field Dates	August 17 th and 26 th , 2018.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.		
Standards	This report meets the standards set forth by the MRIA which can be found here: https://mria-arim.ca/polling		

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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