



NARRATIVE
RESEARCH

Atlantic Canada Public Opinion Study

September 2019

Oceans North together with partners in Atlantic Canada, was interested in better understanding how Atlantic Canadians (i.e., residents of Nova Scotia, New Brunswick, Newfoundland & Labrador, and Prince Edward Island) perceive the state of the oceans. To do so, Oceans North was interested in undertaking quantitative research to understand how residents perceive matters on such topics as:

- Fisheries management;
- Protected areas;
- North Atlantic right whale conservation measures; and
- Plastics in the oceans.

Ultimately, the information derived from this study will be used to help inform matters related to public policy.

Narrative Research was commissioned to undertake a random telephone survey with 1500 Atlantic Canadians in summer 2019, including 400 surveys in each of New Brunswick, Nova Scotia and Newfoundland & Labrador and 300 surveys in Prince Edward Island. To ensure the final sample was representative of the region's population, quotas were set by province, age and gender, and the final data weighted.

The survey was designed by Narrative Research in close consultation with The Ocean Foundation. The final survey length was 13 minutes.

The following report provides a detailed analysis of results. Appended to the report are data tables which provide results for each survey question across key demographics. Table numbers are referenced throughout the report.



- Probability telephone survey



- 1500 interviews (400 in each of NB, NS, NL and 300 in PEI); average survey length was 13 minutes



- Random sample of adults aged 18+ years



- Data collection dates: July 30, 2019 to August 19, 2019



- Overall Atlantic Canada results accurate to within $\pm 2.5\%$, 19 times out of 20. Overall provincial results accurate to within +4.9% for NB, NS, NL and +5.6% for PEI.

Results from The Ocean Foundation's *Atlantic Canada Public Opinion Study* reveal that the Atlantic Ocean and marine environment are clearly considered critical components of Atlantic Canada's economy, with environmental protection efforts generally considered to offer opportunities for growth. Despite the perceived importance placed on oceans and the marine environment, there are clear opportunities to further educate Atlantic Canadians on marine environment and ocean related issues, and on North Atlantic Right Whales in NL.

The following provides key findings of the study:

- Atlantic Canadians believe there are a wide-variety of threats currently facing the health of the Atlantic Ocean, with **plastic waste** and **pollution** being most prevalent. Interestingly, while climate change is also considered a major threat by a clear majority of residents, the impact is not always evident, with residents being evenly divided as to whether or not they have personally noticed changes in the Atlantic Ocean as a result of climate change.
- Overall, results suggest there is **wide support for having a range of stronger laws and regulations** in place to reduce ocean impact, and protect endangered marine species.
- When it comes to the protection and management of our ocean and marine environment, Atlantic Canadians hold the greatest trust in government to fulfill this role. That said, environmental and conservation organizations are also clearly seen as trusted resources that positively impact nature conservation.
- There is a **clear perception that fresh seafood is readily available** in Atlantic Canada. While Atlantic Canadians generally offer moderate agreement that the fishing industry cares about ocean health, residents also offer moderate agreement that commercial fishing is a serious threat to the ocean's health. Further, opinions regarding the industry appear to be somewhat mixed in terms of its regulation, viability and how well it works with environmentalists.
- Currently, **Atlantic Canadians largely support the concept of having an environmentally protected section** of the ocean in their area. For those who are supportive of such an initiative, support tends to be driven by the belief that it would offer protection/replenishment of marine life and the need for ocean protection more broadly. Conversely, for the few opposed to having such protection, opposition is mainly due to the perception that it would negatively impact the economy.
- While awareness of the North Atlantic Right Whale is generally strong and residents place high importance on conservation of the species, there is an opportunity to further educate Atlantic Canadians on the subject, particularly in Newfoundland and Labrador.
- Overall, Atlantic Canadians believe the North Atlantic Right Whale currently faces a range of threats, with fishing gear entanglement, marine pollution, vessel strikes and climate change being most prevalent.

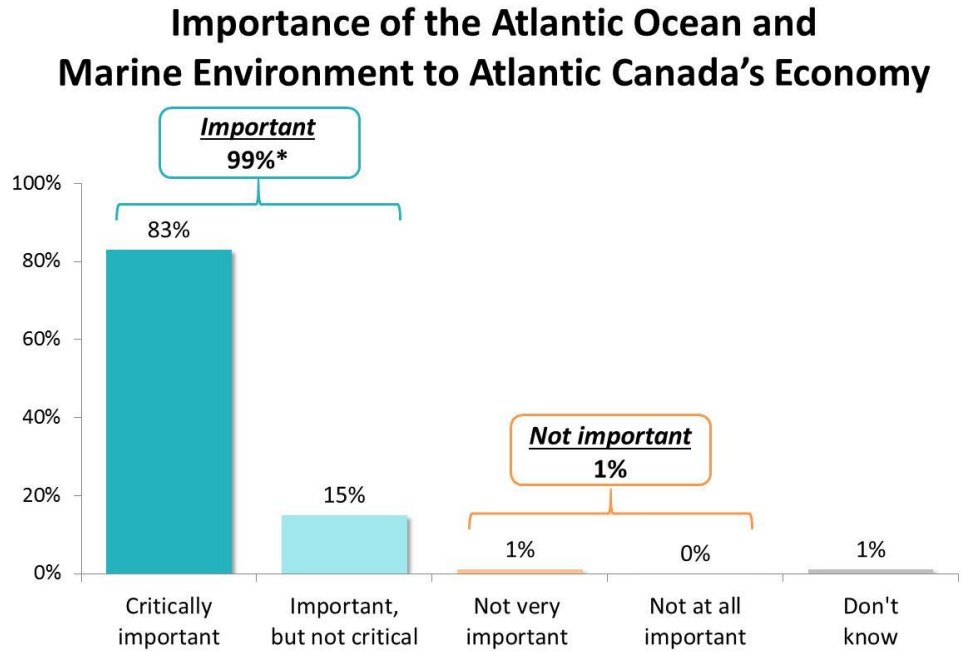


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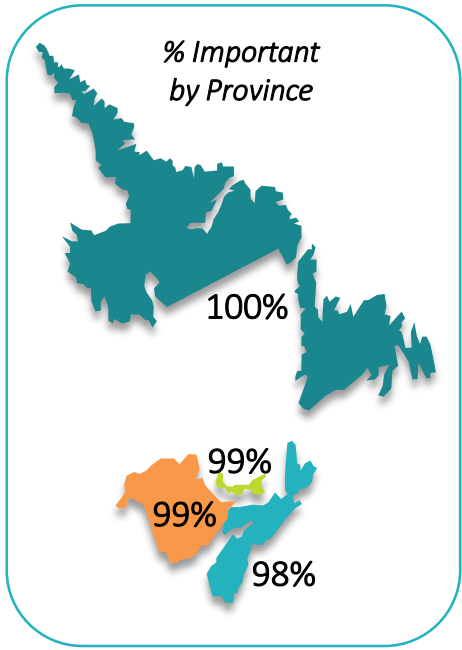
Detailed Findings

The Atlantic Ocean and its marine environment are deemed critically important to Atlantic Canada's economy overall.

Across the region there is consensus that the Atlantic Ocean and its marine environment are critically important to the Atlantic Canada economy overall. This perception is consistent across gender, age and household income. More so, regardless of residents' type of interaction with the Atlantic Ocean (*be it for work, recreation, enjoyment or no interaction*), there is recognition that the Ocean and its marine environment is important to the region's economy overall. (Table 1)



Q.1: In your opinion, how important is the Atlantic Ocean and marine environment to Atlantic Canada's economy overall?
Would you say it is: ...? (n=1502) *Due to rounding.

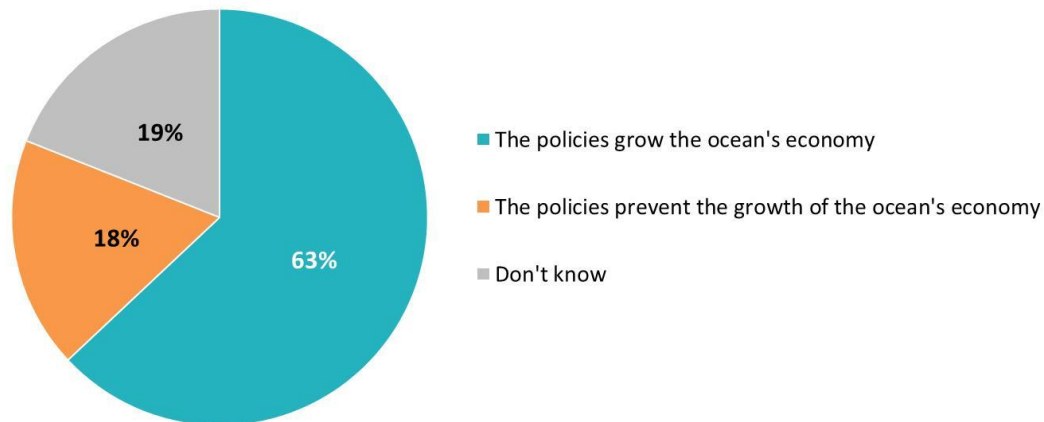


(NB n=400; PEI n=300; NS n=400; NL n=402)

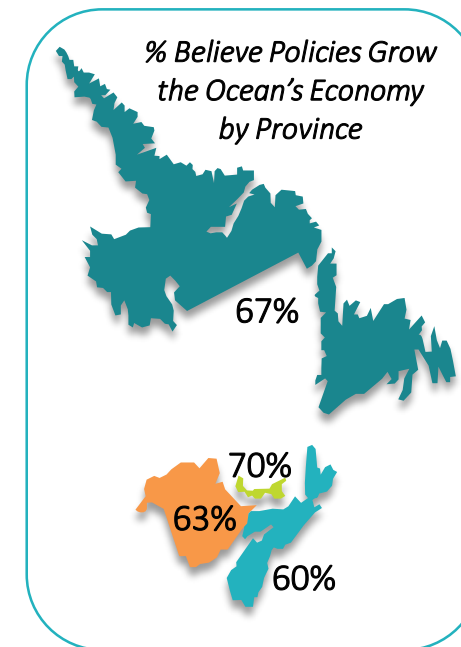
Across the region, environmental protection policies are largely considered to grow Atlantic Canada's ocean economy.

When asked if environmental protection policies **grow** or **prevent the growth** of Atlantic Canada's ocean economy, residents largely believe (63%) that environmental protection policies positively impact the region's ocean economy. This opinion is generally consistent across the region, although most prevalent among those living in PEI or NL. By contrast, two in ten consider such policies to either prevent the growth of the ocean's economy or are unsure what its impact might be. Those who work (or have a family member who works) in an ocean-related occupation are slightly more likely (23%) than others to believe environmental protection policies prevent the growth of the economy. (Table 2)

**Impact of Environmental Protection Policies
on Atlantic Canada's Ocean Economy**



Q.2: Do you believe that environmental protection policies grow or prevent the growth of Atlantic Canada's ocean economy? (n=1502)



(NB n=400; PEI n=300; NS n=400; NL n=402)

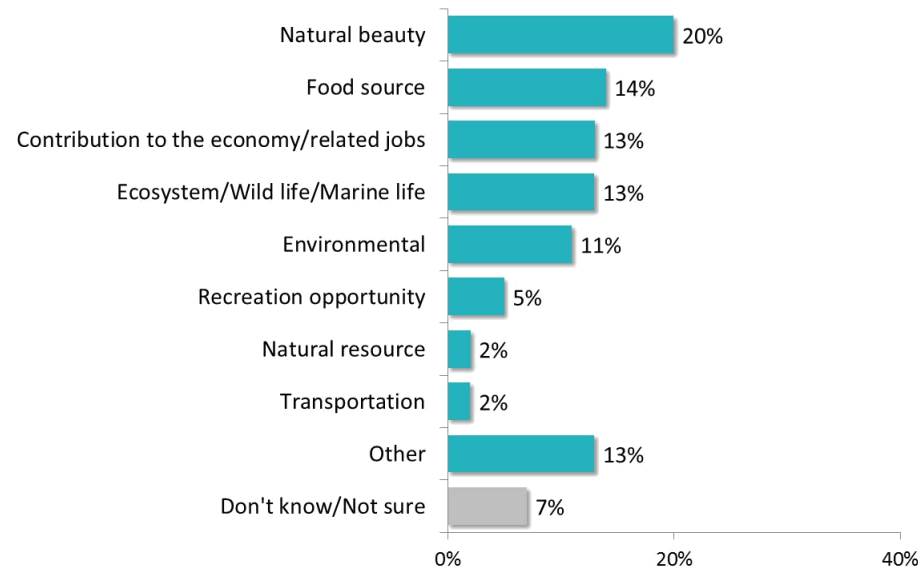
Residents value a variety of factors about Atlantic Canada's ocean, most notably its natural beauty.

A wide range of attributes are valued most about Atlantic Canada's Ocean, most notably its *natural beauty*, *provision of a food source*, *economic contributions*, its *marine life* and *environmental aspects*. (Table 3)

Opinions are mixed when asked if residents have *noticed changes in the Atlantic Ocean as a result of climate change* in the past five years. In fact, residents are as likely to have noticed changes as they are to have not. PEI residents are most likely to have noticed changes, while those in NB are less likely to have done so. (Table 5)

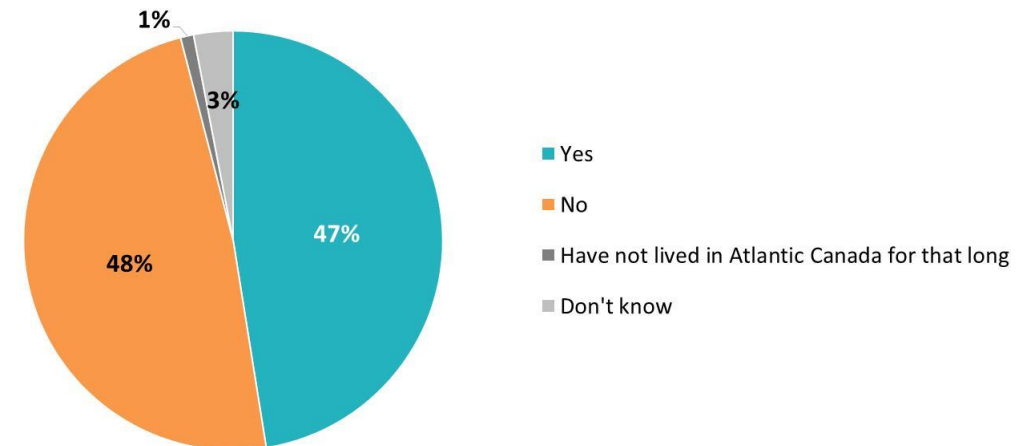
Value Most about Atlantic Canada's Ocean

Total Unaided Mentions



Q.3: What do you value most about Atlantic Canada's Ocean? (n=1502)

Noticed Changes in the Atlantic Ocean as a Result of Climate Change in the Past 5 Years



Q.5: Have you personally noticed any changes in the Atlantic Ocean as a result of climate change in the past 5 years? (n=1502)

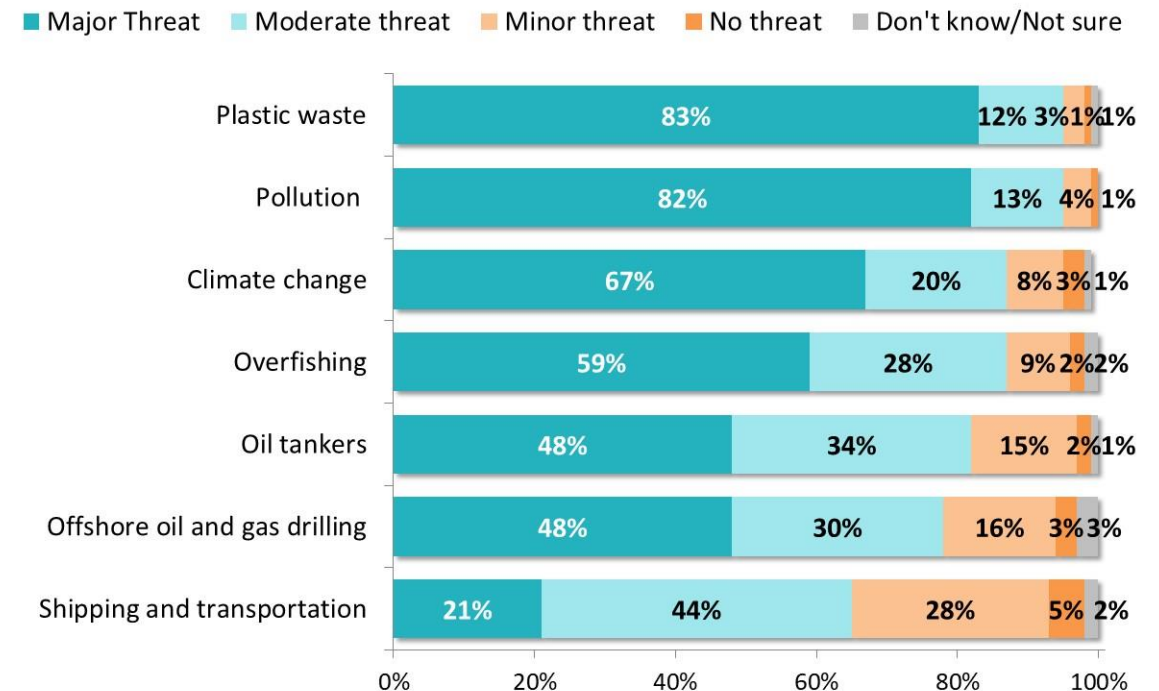
Plastic waste and pollution are considered the greatest threats to the health of the Atlantic Ocean.

When asked what level of threat each of seven factors is to the health of Atlantic Canada's ocean, findings show that plastic waste and pollution are deemed the greatest threat across provinces. Two-thirds of residents consider climate change to be a major threat, while six in ten consider overfishing a major threat. By contrast, less than half of residents consider oil tankers or offshore oil and gas drilling to be a major threat. (Tables 4a-g)

Of note, residents in NL are more likely than those in other provinces to consider overfishing a major threat and are less likely than those in other provinces to consider offshore oil and gas drilling a major threat.

Interestingly, residents are less convinced that shipping and transportation poses a serious threat to the health of Atlantic Canada's ocean.

Threat Level to Health of Atlantic Canada's Ocean



Q.4a-g: Please indicate whether you believe each of the following is a major threat, moderate threat, minor threat or no threat to the health of Atlantic Canada's Ocean? (n=1502)

Across the region, residents place high importance on a range of methods to reduce ocean impacts.

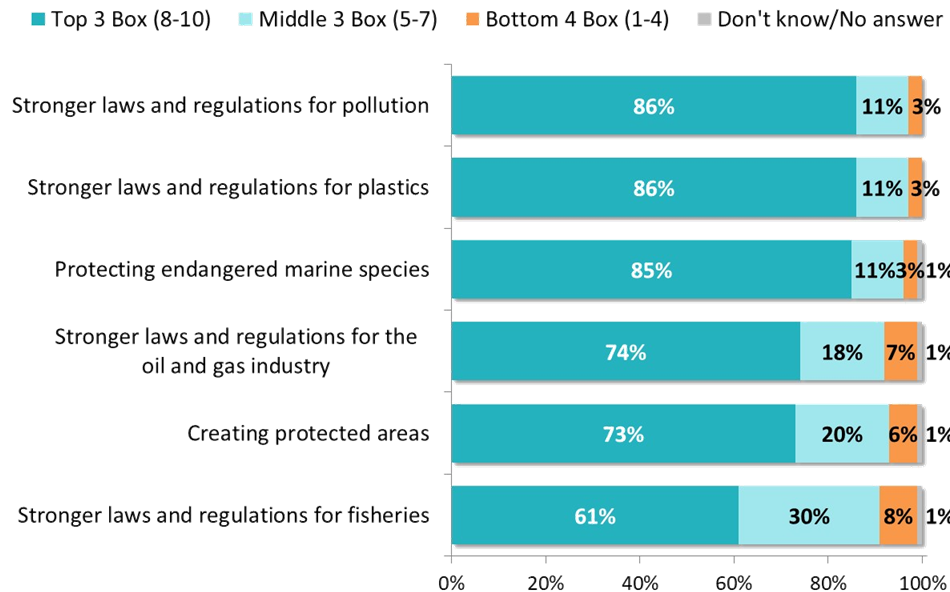
To better understand Atlantic Canadians perceptions relating to efforts to reduce ocean impact, residents were asked to rate the level of importance placed on various conservation actions, whereby '1' was *not at all important* and '10' was *critically important*.

Overall, ***stronger pollution laws/regulations, stronger laws/regulation for plastics, and endangered marine species protection*** were each deemed highly important (scores 8-10) by more than eight in ten Atlantic Canadians, while slightly fewer placed this level of importance on having ***stronger laws/regulations for the oil and gas industry*** and ***creating protected areas***.

At the same time, residents are slightly more moderate regarding the issue of ***laws/regulations for fisheries***. That said, a clear majority still place high importance in having stronger regulation for the industry. Results are consistent across provinces. At the same time, females are more likely than males to place high importance on each method. Further, for many factors, perceived importance tends to increase slightly with age. (Tables 6a-f)

Importance of Methods Used to Reduce Impacts on Ocean

Rating on 10-pt Scale: 10=Critically important, 1=Not at all important



Q.6a-f: There are different things we can do to reduce our impact on the ocean. Using a scale of 1-10, where '1' is not at all important and '10' is critically important, how important is each of the following: ...? (AC n=1502; NB n=400; PEI n=300; NS n=400; NL n=402)

Note: Responses of 'Don't know/No answer' have been excluded from the calculation of mean.

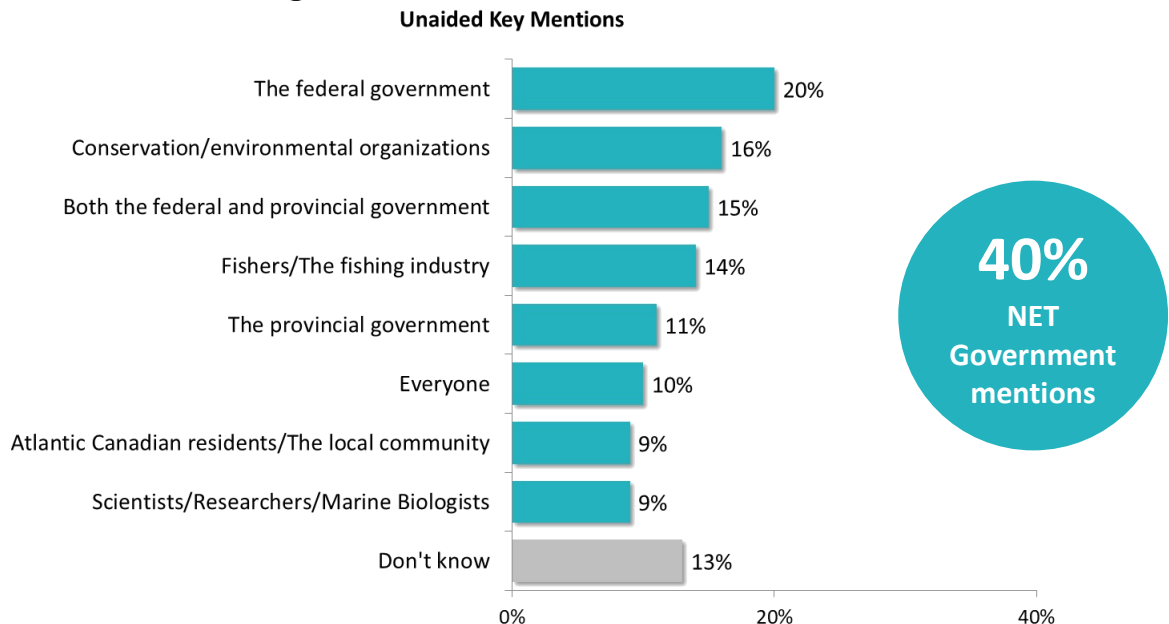
	Means				
AC Overall	NS	PEI	NB	NS	NL
Stronger laws and regulations for pollution	9.0	9.0	8.9	9.0	9.0
Stronger laws and regulations for plastics	9.0	9.0	9.0	9.0	9.0
Protecting endangered marine species	9.0	9.1	8.6	9.0	9.0
Stronger laws and regulations for the oil and gas industry	8.4	8.4	8.4	8.2	8.4
Creating protected areas	8.3	8.4	8.2	8.3	8.2
Stronger laws and regulations for fisheries	7.7	7.6	7.5	7.7	7.8

Atlantic Canadians place broad trust in a variety of organizations when it comes to ocean and marine environmental protection.

When asked, unaided, who they trust most to manage and protect our ocean and marine environment, residents most commonly mention some level of **government** (40%). More specifically, residents most commonly express trust in the **federal government**, closely followed by **conservation/environmental organizations**, both the **federal and provincial government**, and those working in the **fishing industry**. At the same time, one in ten place greatest trust in the provincial government specially, while similar portions trust **everyone**, **Atlantic Canadian residents** generally and **scientists/researchers/marine biologists**. Conversely, just over one in ten are unsure as to who they would trust most to manage this issue. (Table 7)

Overall, NL residents, males, and higher income earners (i.e., those with a household income of \$100K+) are more likely than their respective counterparts to place trust in government.

Trust Most to Manage and Protect Ocean and Marine Environment

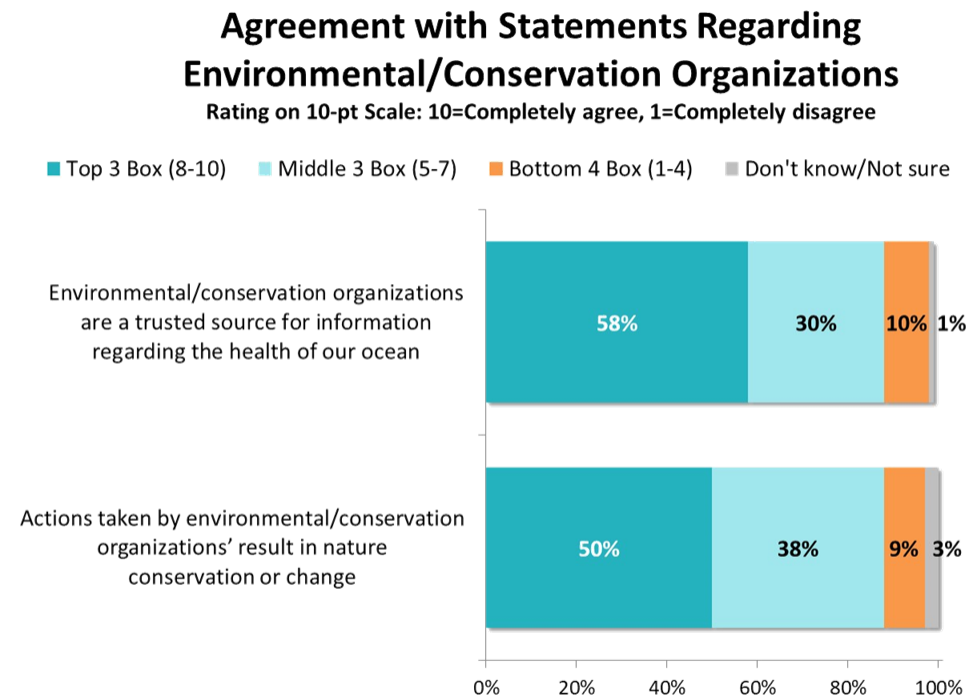


Q.7: Who do you trust the most to manage and protect our ocean and marine environment? Any others? (n=1502)

Atlantic Canadians generally agree that environmental/conservation organizations are trusted resources and that their actions result in nature conservation or change.

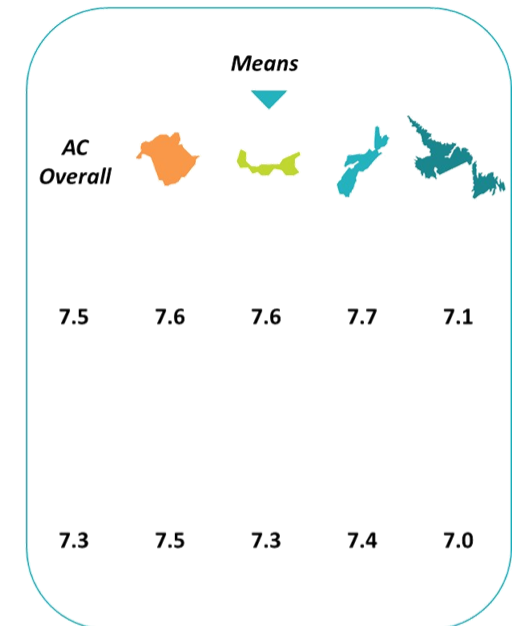
Across the region, *environmental/conservation organizations are largely considered a trusted source for information* regarding the health of our ocean. In fact, six in ten strongly agree with that statement, while only one in ten do *not* agree.

Similarly, most Atlantic Canadians believe that *actions taken by environmental/conservation organizations result in nature conservation or change*. (Tables 8a-b)



Q.8a-b: Using a scale of 1-10, where '1' is completely disagree and '10' is completely agree, to what extent do you agree or disagree with each of the following statements: ...? (AC n=1502; NB n=400; PEI n=300; NS n=400; NL n=402)

Note: Responses of 'Don't know/Not sure' have been excluded from the calculation of mean.



While Atlantic Canadians readily agree they have easy access to fresh seafood, opinions tend to be somewhat moderate regarding aspects of the fishing industry in terms of its regulation, viability and how well it works with environmentalists.

To better understand general perceptions regarding the fishing industry more broadly, residents were asked to indicate the level of agreement to a series of statements whereby '1' meant *completely disagree* and '10' meant *completely agree*.

While the vast majority of Atlantic Canadians strongly agree (scores 8-10) that they have **access to fresh seafood**, residents appear to hold more moderate opinions on other aspects of the industry. Indeed, residents are equally as likely to agree that the **fishing industry cares about the ocean's health**, and that **commercial fishing is a serious threat to the region's ocean health**, with four in ten offering strong agreement to each statement.

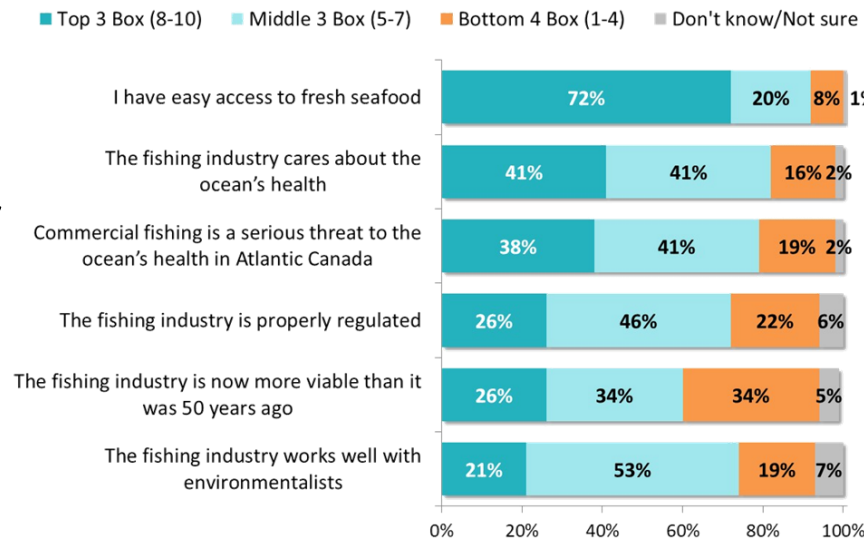
Only one-quarter of residents strongly agree that the **industry is properly regulated**, while a similar portion disagrees with this sentiment. At the same time, residents are slightly more likely to disagree than agree that the **industry is more viable than it was 50 years ago**.

Similarly, residents appear somewhat divided with regards to whether the **industry works well with environmentalists**, with just over one-half giving moderate scores (scores 5-7). (Tables 9a-f)

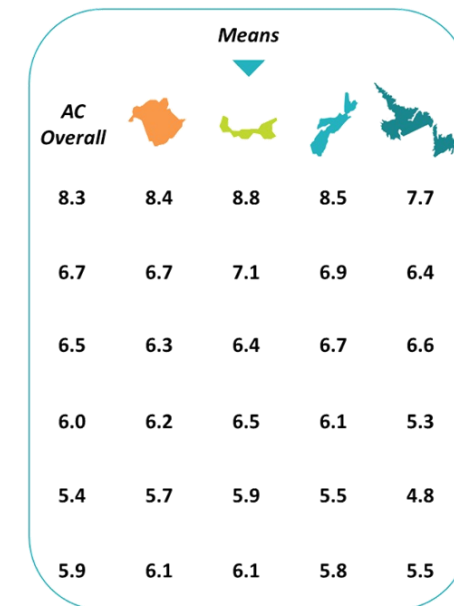
Results are generally consistent across regions, with NL residents tending to give more moderate scores on many of the issues examined.

Agreement with Statements Regarding the Fishing Industry in Atlantic Canada

Rating on 10-pt Scale: 10=Completely agree, 1=Completely disagree



Q.9a-f: To what extent do you agree or disagree with each of the following statements? Please use the same 1-10 scale. (AC n=1502; NB n=400; PEI n=300; NS n=400; NL n=402) Note: Responses of 'Don't know/Not sure' are excluded from the Mean score calculations.



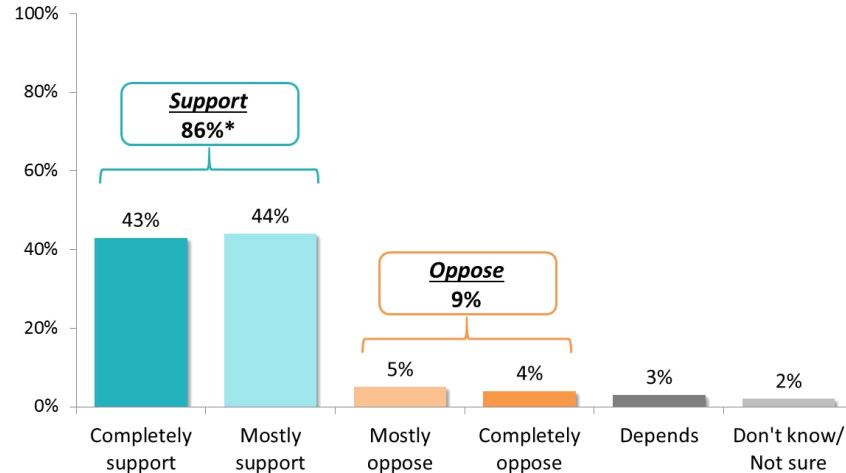
Support for Environmentally Protected Sections of Ocean

The vast majority of Atlantic Canadians support having an environmentally protected section of the ocean in their area.

Nearly nine in ten residents (86%) offer some level of support to the idea of having an **environmentally protected section of the ocean in their area**, with more than four in ten offering **complete** support. Only one in ten oppose the concept. Opinions are generally consistent across provinces, although males and those employed in an ocean-related occupation are slightly *less* likely than their respective counterparts to express such support. (Table 10)

Overall, those who support the concept most commonly note reasons related to **protection/replenishment of marine life** and the **need for ocean protection** more broadly. Conversely, opposition is primarily driven by the perception that it would **negatively impact the economy**.

Support for an Environmentally Protected Section of the Ocean in Your Area



Q.10: If an environmentally protected section of the ocean was proposed in your area, would you completely support, mostly support, mostly oppose or completely oppose the idea? (n=1502) *Due to rounding.

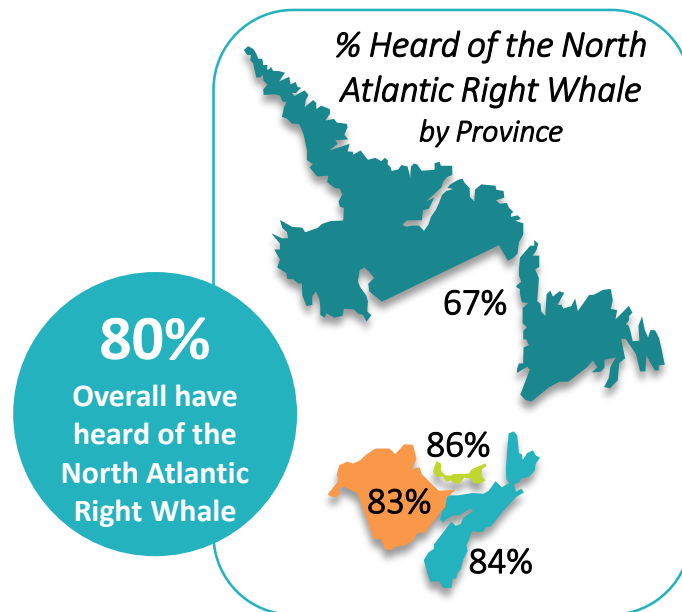
Reasons for Support / Opposition (Unaided Key Mentions)

Support (n=1,305)		Opposition (n=123)	
To protect/replenish marine life/fish	27%	Negatively impacts the economy	34%
Need to protect the ocean	23%	Doesn't do enough to protect the ocean/marine life	12%
It is important/ We need to do something	14%	Will not work/Waste of time/money/ Fish don't stay in one area	9%
Good for the environment	8%	It will be poorly managed/regulated	8%
Reduce pollution/waste/ Too much plastic in the ocean	6%	Not necessary/Mother nature is better at protecting/replenishing itself	7%
Don't know	5%	Don't know	5%

Awareness of the North Atlantic Right Whale is strong, with residents placing high importance on conservation of the species.

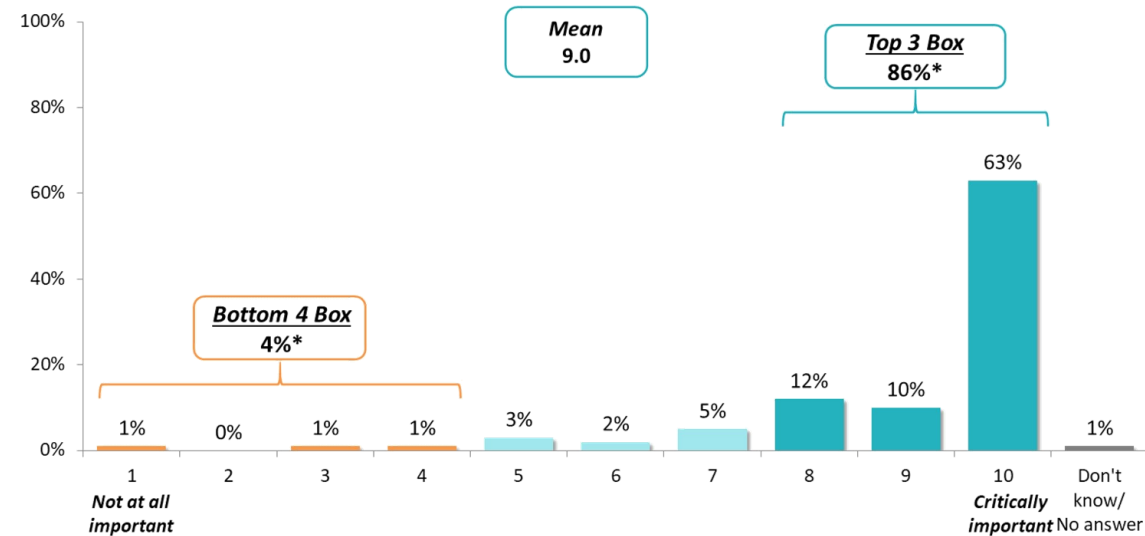
Overall, eight in ten Atlantic Canadians have heard of the North Atlantic Right Whale; however, awareness is notably less prevalent among NL residents and among those 35 years of age or older (18-34: 63% vs. 35-53: 83% and 55+: 87%). Males are also slightly more likely than females to be aware (84% vs. 77%). (Table 12)

Across all four provinces, after being provided with a brief background on the species' endangered status, nearly nine in ten residents place high importance (scores of 8-10 on a 10-pt. scale) on the conservation of the North Atlantic Right Whale. (Table 13)



Q.12: Have you previously heard of the North Atlantic Right Whale, a species of whale commonly found in the northern region of the Atlantic Ocean? (AC 1,502; NB n=400; PEI n=300; NS n=400; NL n=402)

Importance of the Conservation of the North Atlantic Right Whale



Q.13: As background, the North Atlantic Right Whale lives in the North Atlantic Ocean and is found all along the eastern coast of the United States and Canada, as well as across the ocean off the coasts of Europe and North Africa. Presently, it is the most endangered whale in the world and protected under Canada's Species at Risk Act. Some scientists believe population levels have dropped too low to recover. Knowing that, using a 1 to 10 scale, where 1 is 'not at all important' and 10 is 'critically important', how important is the conservation of the North Atlantic Right Whale? (n=1502) *Due to rounding.

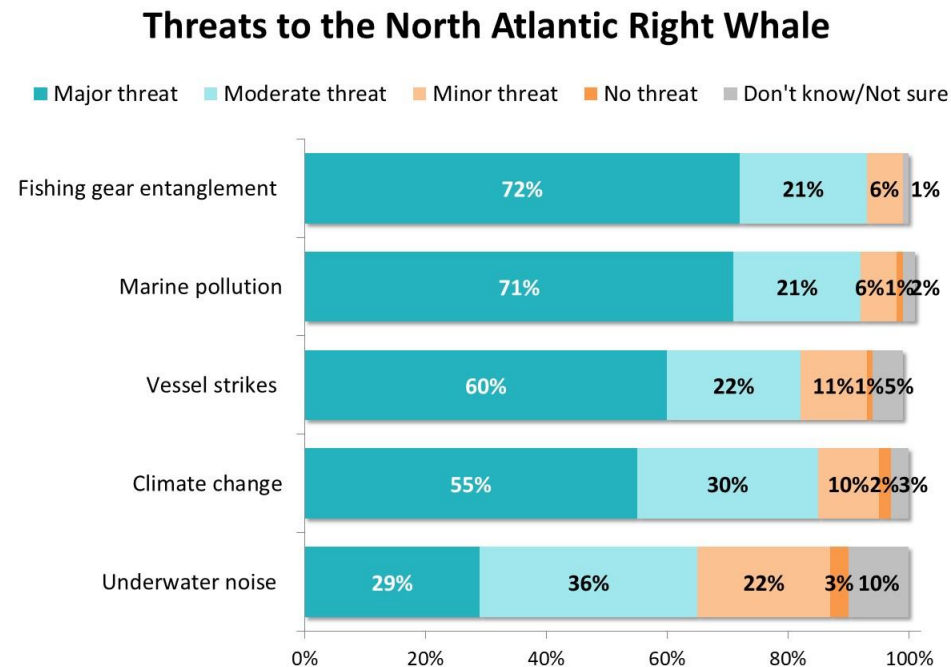
Note: Responses of 'Don't know/No answer' have been excluded from the calculation of mean.

Atlantic Canadians believe the North Atlantic Right Whale faces a variety of major threats.

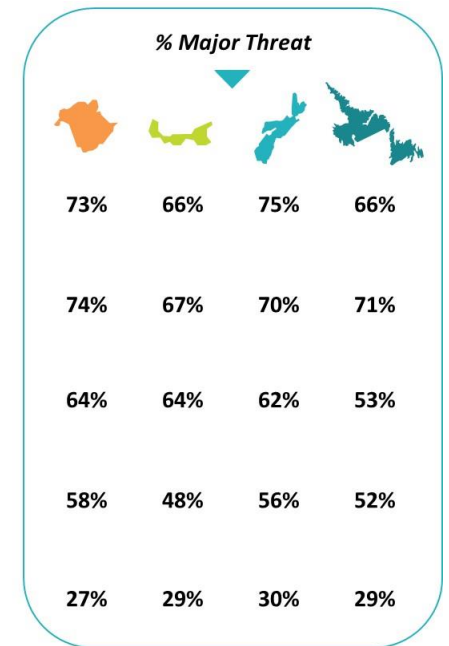
To better understand perceptions regarding the severity of threats being encountered by North Atlantic Right Whales, residents were asked to indicate the level of threat a variety of factors were to the species.

Fishing gear entanglement and *marine pollution* are each deemed to be a major threat by more than seven in ten residents, while fewer, albeit still a majority, believe *vessel strikes* and *climate change* are major threats. Conversely, only three in ten deem *underwater noise* to be a major threat, with a similar portion stating this would only be a minor threat or no threat at all. (Tables 14a-e)

Of note, some differences in opinion are evident across provinces with PEI residents being least likely to consider climate change a major threat to the North Atlantic Right Whale, while NL residents are least likely to consider vessel strikes a major threat.



Q.14a-e: Please indicate whether you believe each of the following is a major threat, moderate threat, minor threat or no threat to North Atlantic Right Whales. (AC n=1502; NB n=400; PEI n=300; NS n=400; NL n=402)



every insight tells a story.

