

2010 Canadian Water Attitudes Study

This study is made available to NGOs and other interested parties,
courtesy of RBC and Unilever Canada.

We encourage the broad dissemination of the data and findings of this study, and hope the information helps contribute to a healthy conversation about the value and vulnerability of water in Canada. You are welcome to refer to, reprint or redistribute this information, and we ask that you attribute the source as the “2010 Canadian Water Attitudes Study, commissioned by RBC and Unilever Canada.”



About The Canadian Water Attitudes Study

The 2010 Canadian Water Attitudes Study was commissioned by RBC and Unilever Canada, and administered online by Ipsos Reid from February 17-23, 2010. It included a sample of 2,022 adult Canadians across Canada. The results are considered accurate to within +/-2.2%, 19 times out of 20. The data were weighted by region, age and sex according to 2006 Census data.

RBC

- RBC is one of North America's leading diversified financial services companies and among the largest banks in the world, as measured by market capitalization. It employs approximately 80,000 full- and part-time employees who serve more than 18 million personal, business, public sector and institutional clients through offices in Canada, the U.S. and 53 other countries.. RBC is recognized among the world's financial, social and environmental leaders and is listed on the 2009-2010 Dow Jones Sustainability World Index and the DJSI North American Index. RBC has been named one of Canada's Greenest Employers, one of Canada's Best Diversity Employers, one of Canada's 50 Most Socially Responsible Corporations and one of the Best Workplaces in Canada. RBC is also listed on the Jantzi Social Index, the FTSE4Good Index, and the Canadian Carbon Disclosure Project Leadership Index. As one of Canada's largest corporate donors, RBC supports a broad range of community initiatives, through donations, sponsorships and employee volunteer activities. In 2009, RBC contributed more than \$105 million to community causes worldwide, through donations of more than \$52.6 million, and an additional \$52.5 million in sponsorship of community events and national organizations. The RBC Blue Water Project is a 10-year, \$50 million philanthropic commitment to supporting organizations that protect watersheds and ensure access to clean drinking water. Since 2007, RBC has committed more than \$20.48 million to more than 200 organizations worldwide working in this area. For more information, visit www.rbc.com/bluewater.

Unilever Canada

- Unilever works to create a better future every day. We help people feel good, look good and get more out of life with brands that are good for them and good for others. Each day, around the world, consumers make 160 million decisions to purchase Unilever products. In Canada the portfolio includes brand icons such as: Axe, Becel, Ben & Jerry's, Breyers, Degree, Dove personal care products, Hellmann's, Klondike, Knorr, Lipton, Skippy, Slim-Fast, Sunsilk and Vaseline. All of the preceding brand names are registered trademarks of the Unilever Group of Companies. Dedicated to serving consumers and the communities where we live, work and play, Unilever employs more than 13,000 people across North America – generating nearly \$10 billion in sales in 2009. With a steadfast commitment to water sustainability, Unilever strives to lead by example and remains committed to further reducing its water footprint. For eleven years running, Unilever has been acknowledged as the food industry category leader on the Dow Jones Sustainability Index for their environmental policies. For the fifth year running, Unilever was also named amongst the 'Global 100 Most Sustainable Corporations in the World' by Corporate Knights and Innovest, an international finance and investment advisory firm. Unilever is also an active participant in several water sustainability programs across Canada including EcoVoyageurs, a national school-based education program in which students are encouraged to reduce their own 'environmental footprint'. In 2008, Unilever Canada launched Go Blue, a national awareness program which to educate consumers about steps they can take to conserve water in their daily lives. For more information, visit www.unilever.com

• Quality of Water

- More Canadians now (79%) than a year ago (72%) have confidence in the safety of Canada's water supply in general. Further, more Canadians are confident in the water that comes out of their taps – more Canadians are now drinking tap water than a year ago.
- Most (83%) Canadians are concerned about the quality of water in the lakes where they swim. Moreover, two in three (68%) perceive that the problem of lake water quality is getting worse, while few (10%) think it's improving.
- One quarter (25%) of Canadians have no idea where their water comes from.
- While awareness of the water quality problem on reserves is low, once informed of the problem most (74%) become concerned about the situation. Given the opportunity to support either an organization that works to rectify this problem at home on native reserves or an organization that serves international locations of humanitarian disaster, Canadians would choose to support the local organization to a 2:1 margin.
- 15% of Canadians didn't know that toilet water and tap water are the same. Given the choice, most (66%) say toilet water is too clean, not that faucet water is too dirty (34%).

• Supply of Water

- Canadians are more confident (75%) than last year (70%) that Canada has enough freshwater supply for the long term. With the exception of Alberta, Canadians are more confident of the water supply in their region than in Canada at large.
- Most Canadians overestimate the abundance of water in Canada and underestimate the degree to which water is lost from our municipal water pipes.
- Canadians still believe that run-off pollutants are the biggest threat to the water supply in Canada, but twice as many now believe that waste from individual consumers is the biggest threat, and households now tie businesses as the biggest water consumers in the eyes of Canadians.

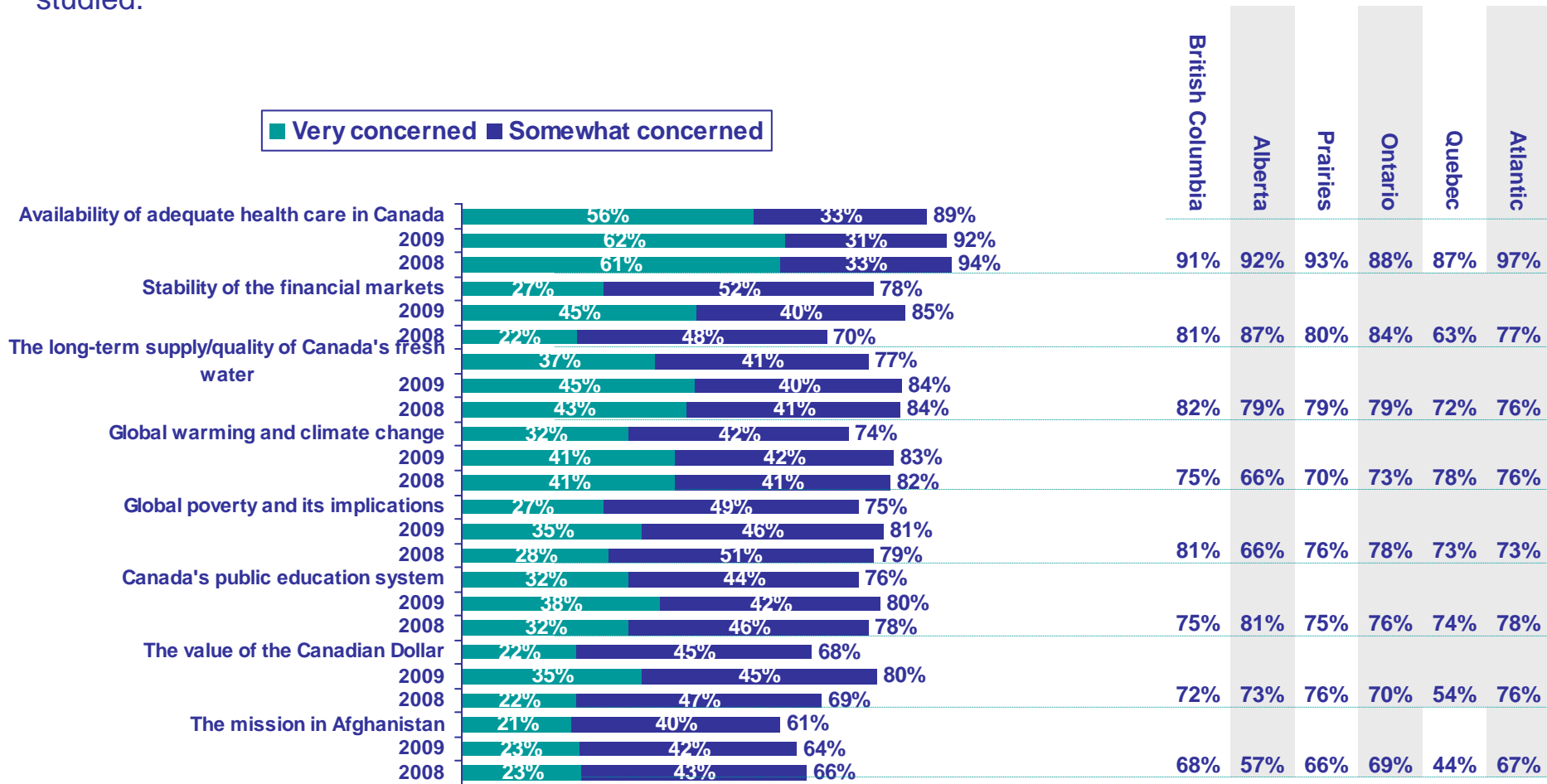
• Water Conservation Habits

- More Canadians admit to trying reasonably hard to conserve electricity than water, despite the fact that they say they're making reasonable efforts to conserve. And while they give themselves good grades, governments, businesses and other Canadians are apparently doing a lousy job.
- While all sorts of water-wasting activities upset Canadians when they others engaging in such activities, most (80%) admit to committing some sort of wasteful activity.
- Canadians are generally not getting better when it comes to performing water conservation activities, such as installing low-flow toilets, showerheads, rain barrels, etc.

• Corporate Actions

- Not much has changed since last year on this front. A similar proportion of Canadians report having boycotted a company for misusing water, and the same is true regarding Canadians who begin doing business with a company because they learned they use water responsibly.
- Unilever has gained some directional momentum with regards to its raising of awareness of water conservation. Roughly one in three could be inspired to buy a product that they perceive to save water. They are equally as enticed by hearing that a product is made using less water as they are to hear that a company supports an organization that conserves water.

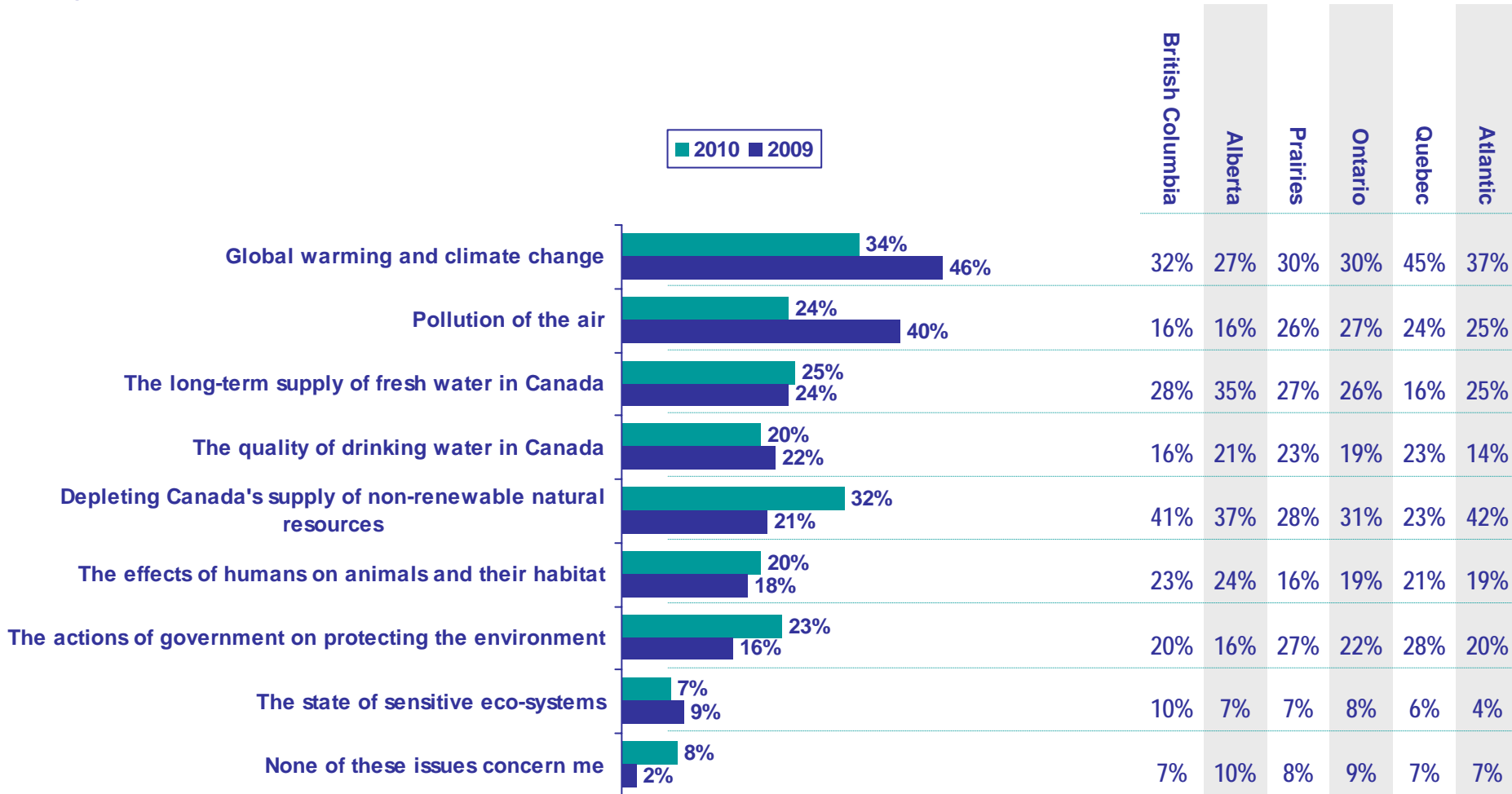
Healthcare continues to trump other issues. Canadians seem to be less concerned about every issue studied.



1. Below is a list of issues that you might be concerned about. For each, please tell me the degree to which you are or are not concerned.
 Base: All Respondents 2010 n=2022; 2009 n=2165, 2008 n=2309

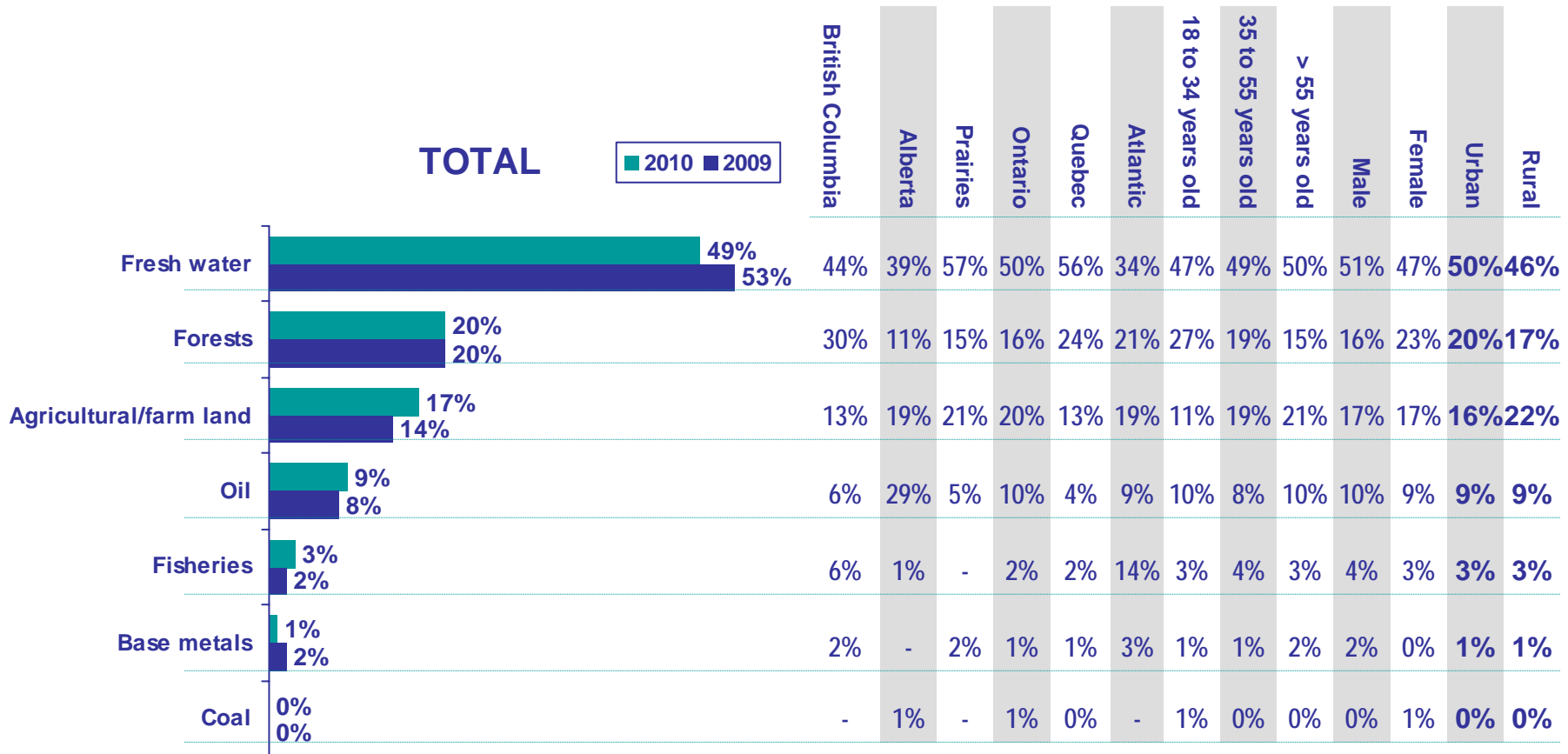
Most Concerning Environmental Issues (aided)

While still in first position, global warming and climate change are mentioned by fewer Canadians. The largest increase occurs in the depletion of Canada's supply of non-renewable resources.



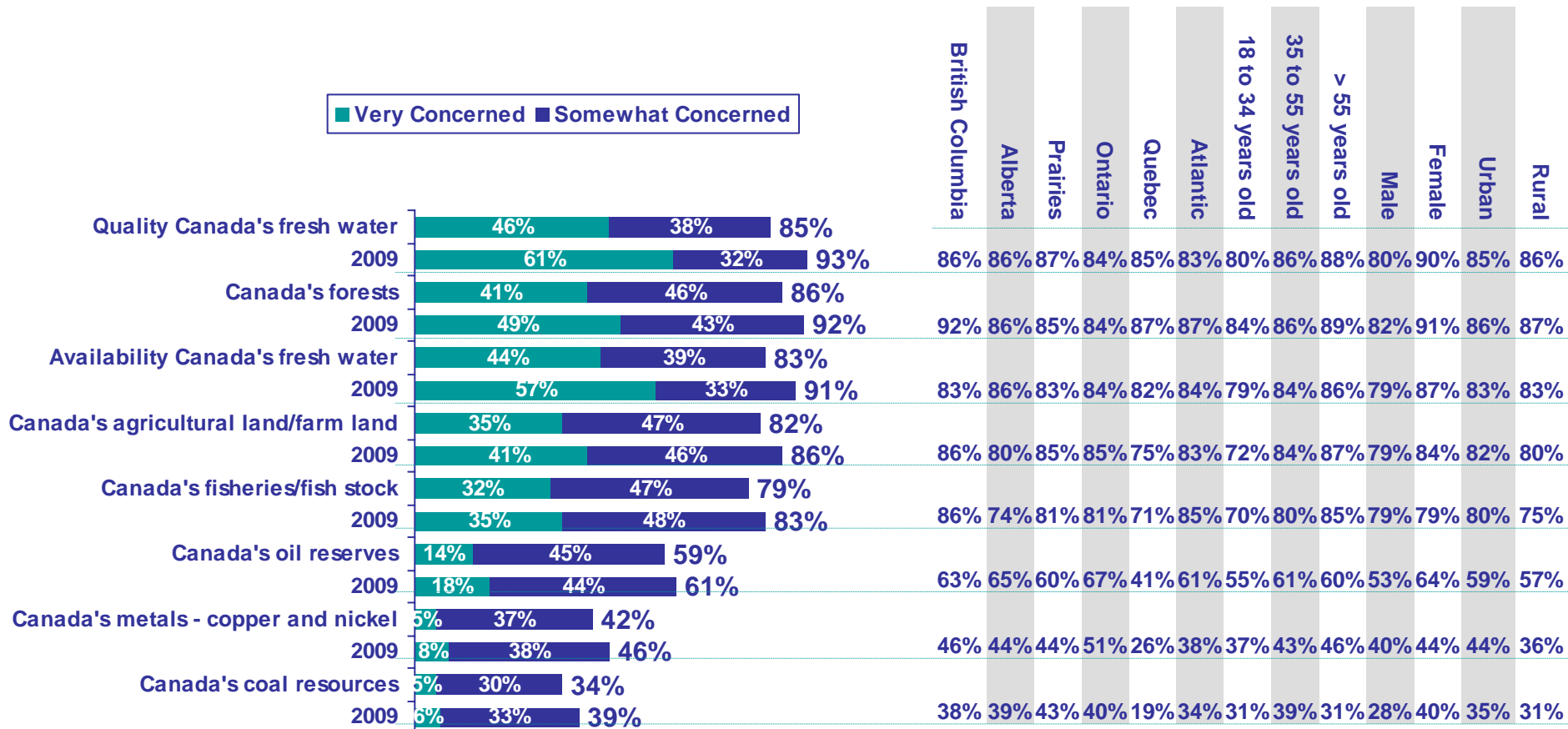
2. Focusing on the list below, please select the two issues below that you're most concerned about
 Base: All Respondents 2010 n=2022; 2009 n = 2165

Canadians continue to believe that fresh water is Canada's most important natural resource.



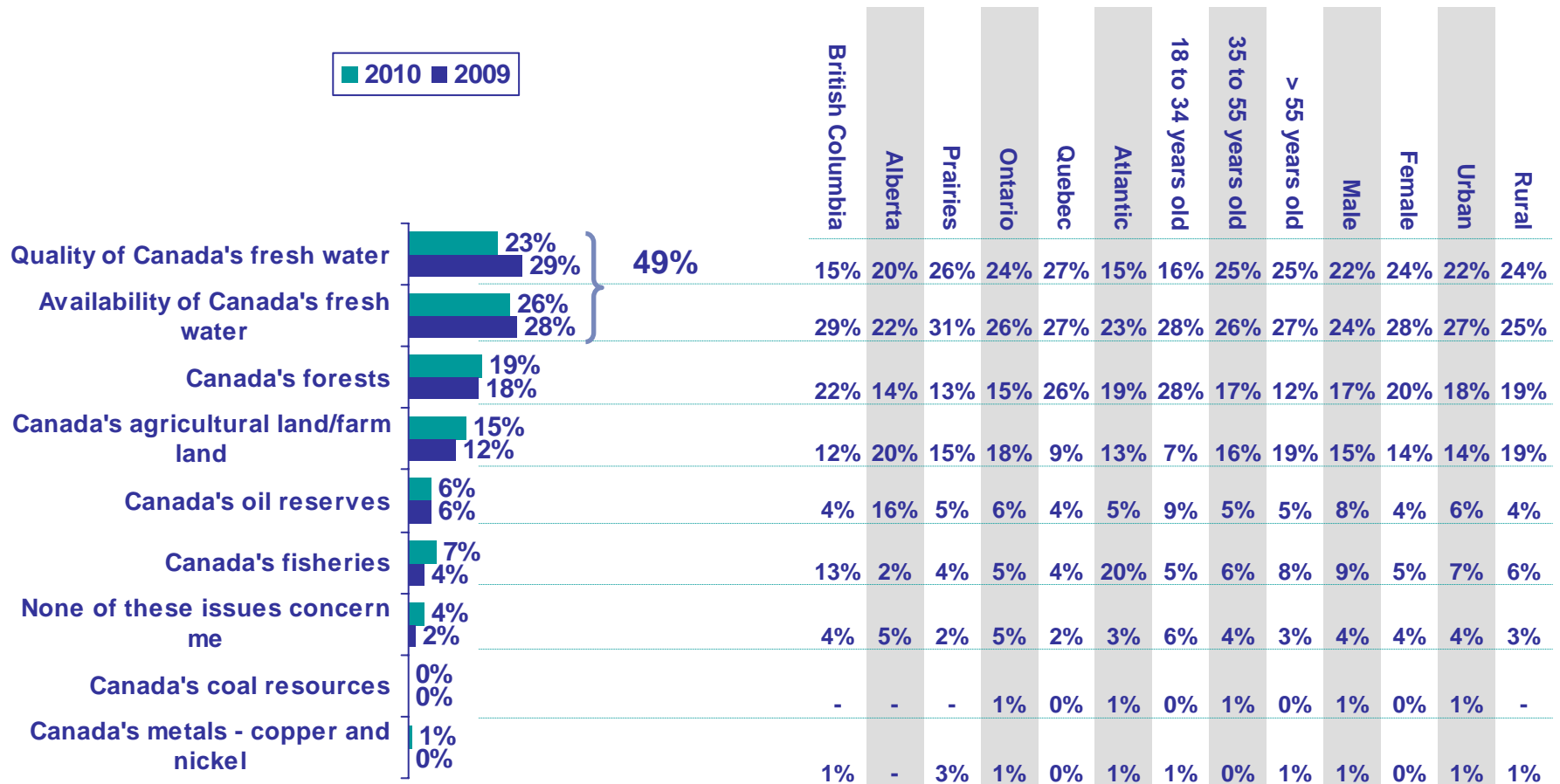
3. Which of the following would you consider to be Canada's most important natural resource?
 Base: All Respondents 2010 n=2222; 2009 n = 2165

The quality of freshwater and forests are statistically tied when it comes to the worry Canadians have towards the declining state of various resources.



4. How concerned are you about the declining state of following?
 Base: All Respondents 2010 n=222; 2009 n = 2165

But when forced to choose which one they're most concerned about, water is clearly in first position.

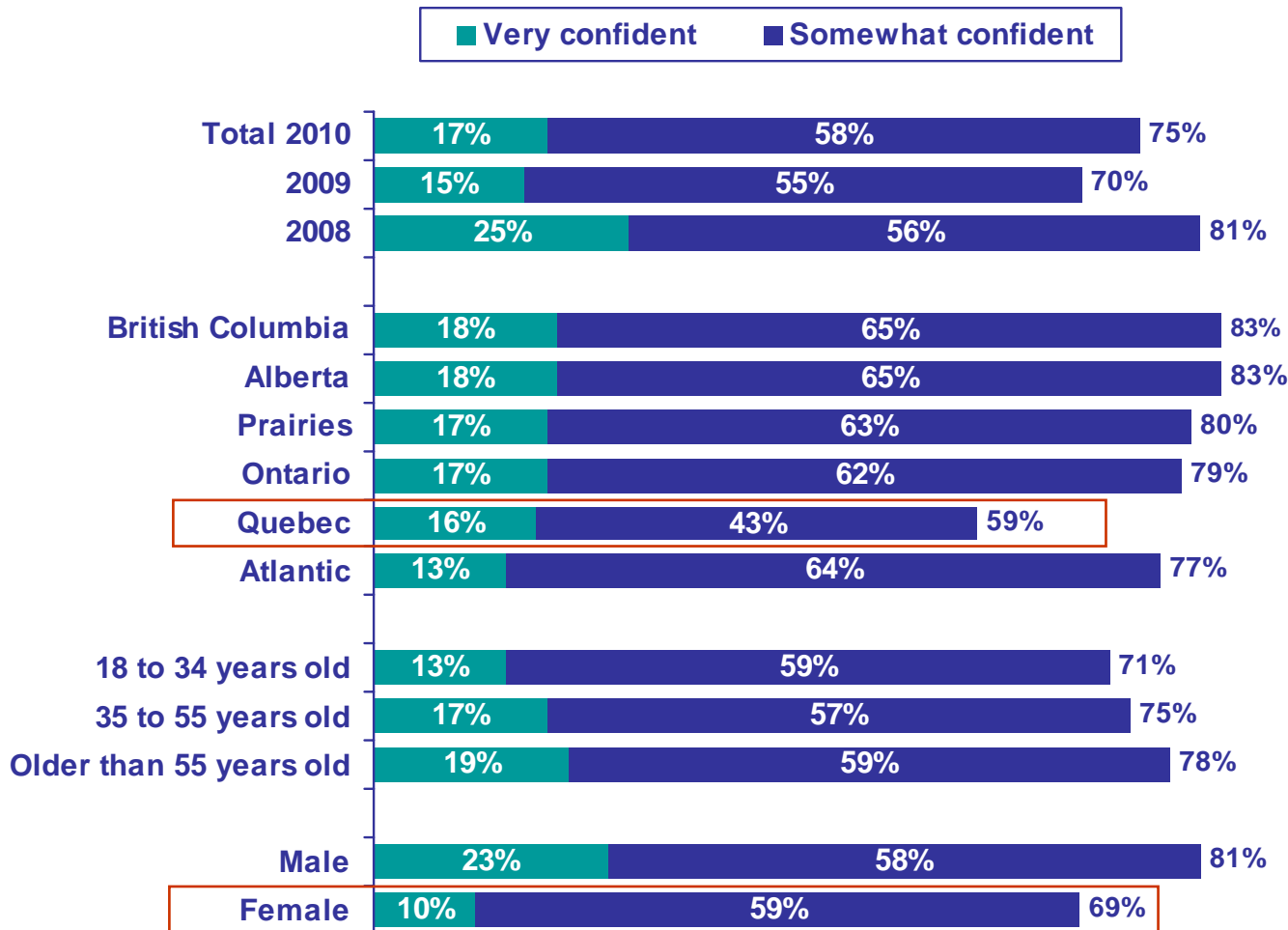


4b. And, which are you most concerned about?
 Base: All Respondents 2010 n=2022; 2009 n = 2165

Level of Confidence That Canada Has Enough Fresh Water to Meet Long-Term Goals

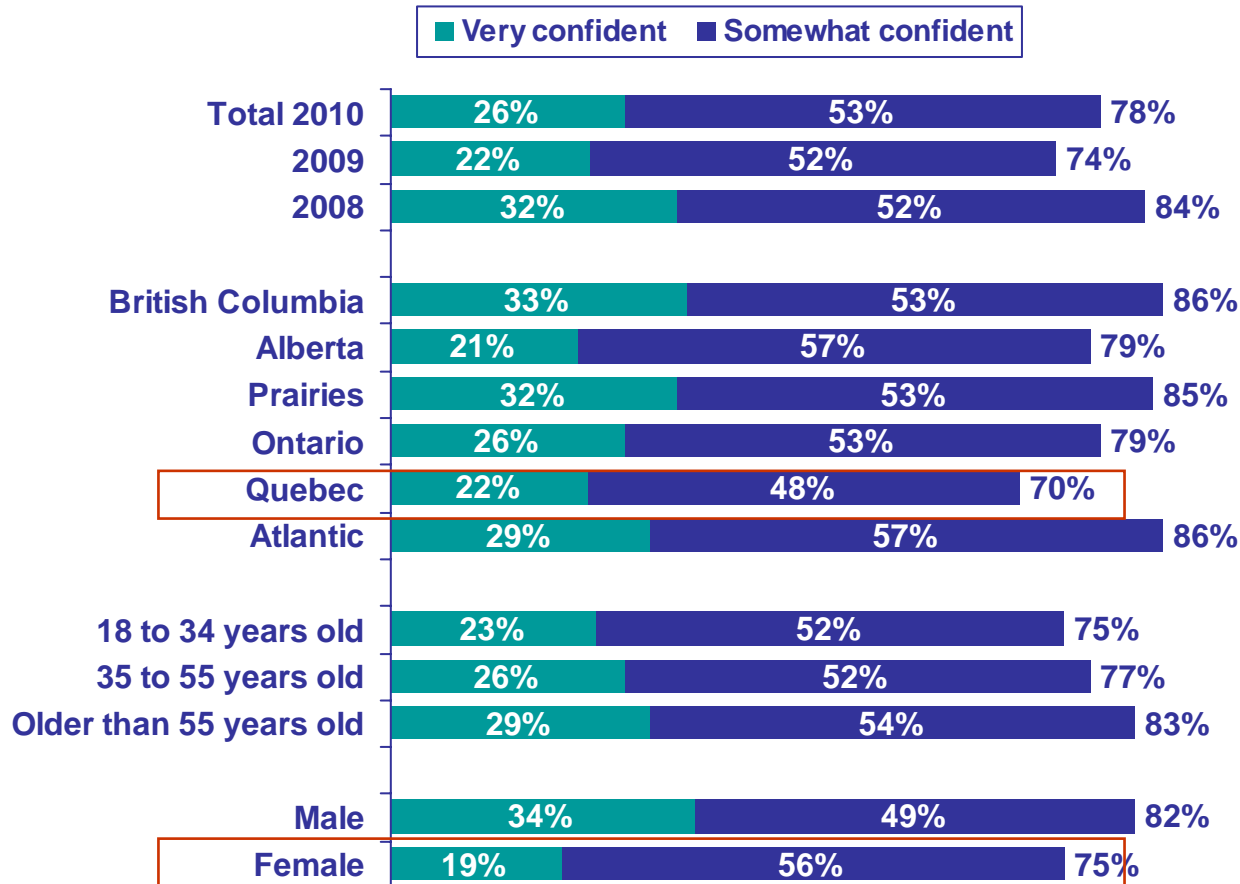
Confidence that Canada has enough freshwater supply for the long-term has increased

- Quebecers are disproportionately less confident in Canada's long-term supply of fresh water and women are less confident than men.



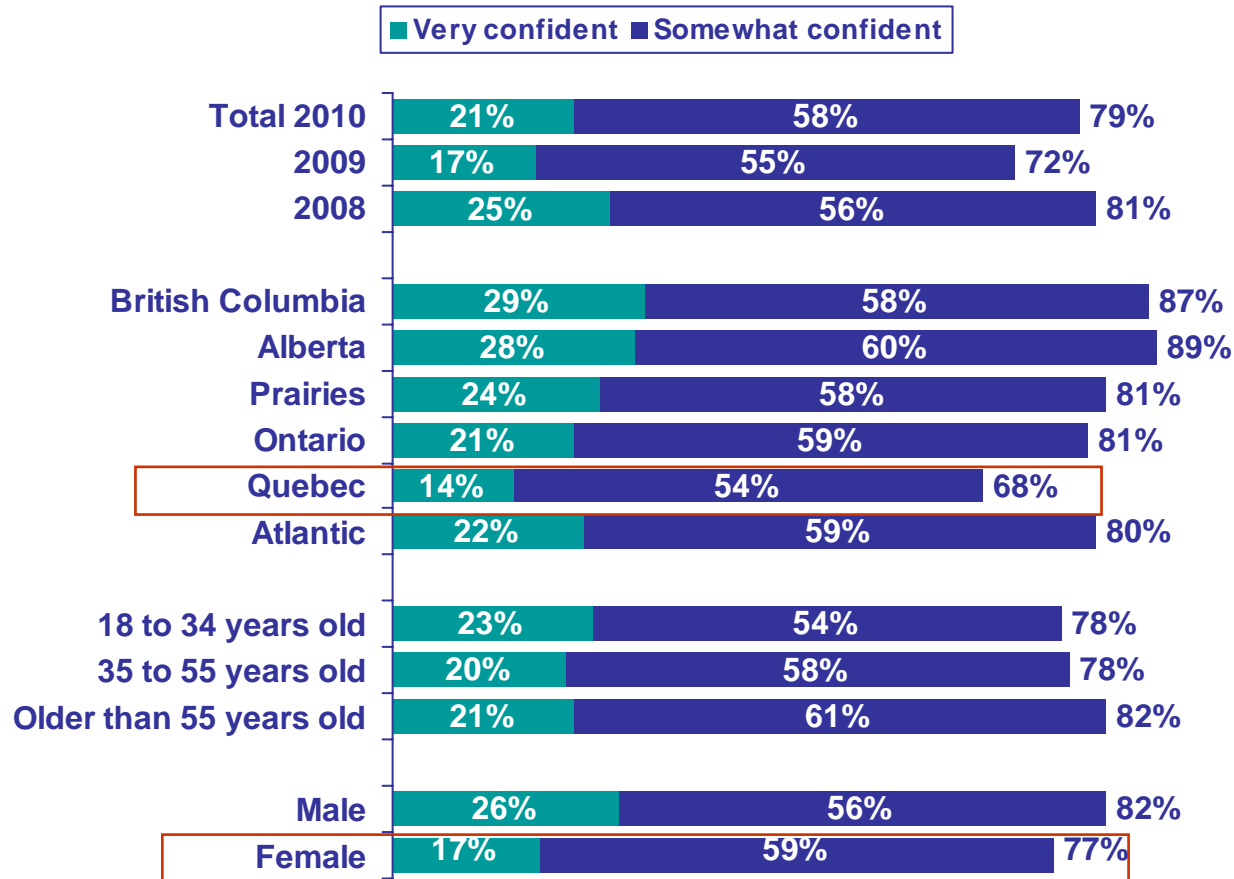
5. Now, thinking specifically about Canada's supply of fresh water, how confident are you that Canada as a whole has enough freshwater to meet our long-term needs?
 Base: All Respondents 2010 n=2022; 2009 n = 2165, 2008 n = 2309

Canadian's confidence in their region's available water has also increased over the past year. Canadians tend to be more confident that their region has enough fresh-water to meet their needs than other parts of Canada, with the exception of Alberta.



6. And focusing specifically on your region of Canada, how confident are you that it has enough freshwater to meet your region's long-term needs?
 Base: All Respondents 2010 n=2022; 2009 n = 2165, 2008 n = 2309

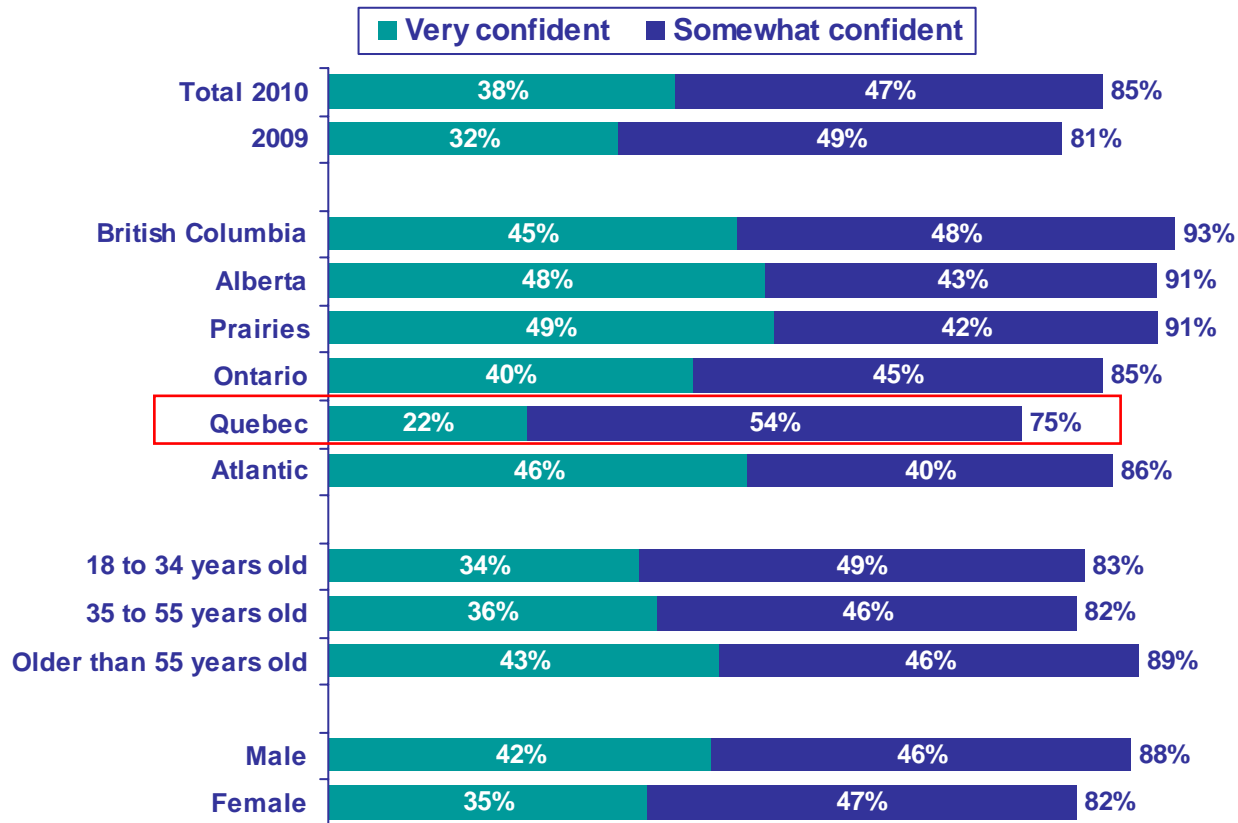
Confidence in the **safety** of Canada's water supply has also increased over the past year. Quebecers are less confident in the safety of their water than other regions.



7. Overall, How confident are you about the safety and quality of Canada's drinking water?
 Base: All Respondents 2010 n=2022; 2009 n = 2165, 2008 n = 2309

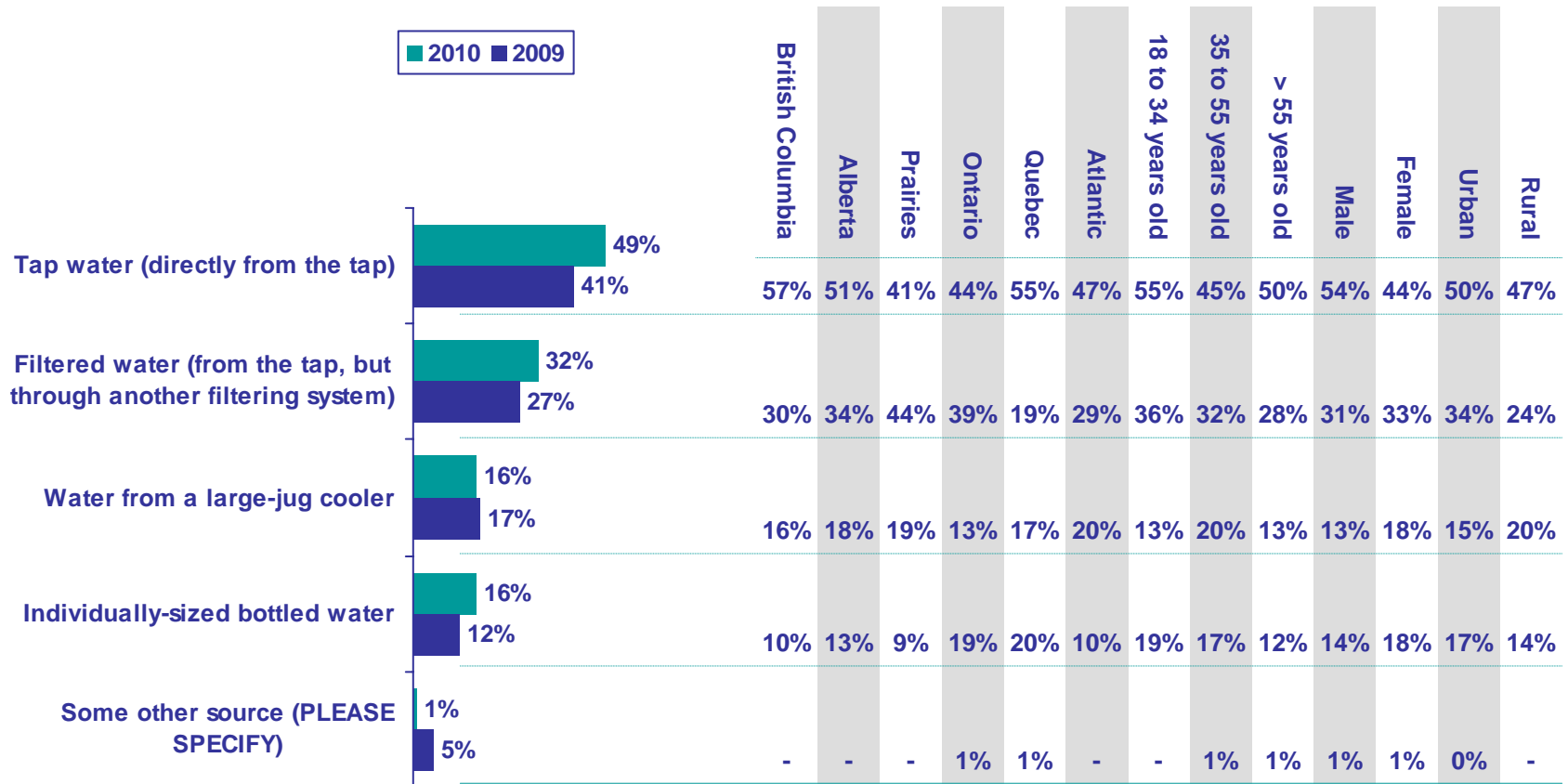
Canadians are slightly more confident in the safety of the water in their home than water in other parts of Canada.

- Those who drink tap water are most confident (91%), while those who drink individual bottled water are least confident (76%).
- Those whose source of tap water is a lake (88%) or a well (88%) are most confident, while those who have no idea (79%) or get their water from one of the great lakes (82%) are less confident.



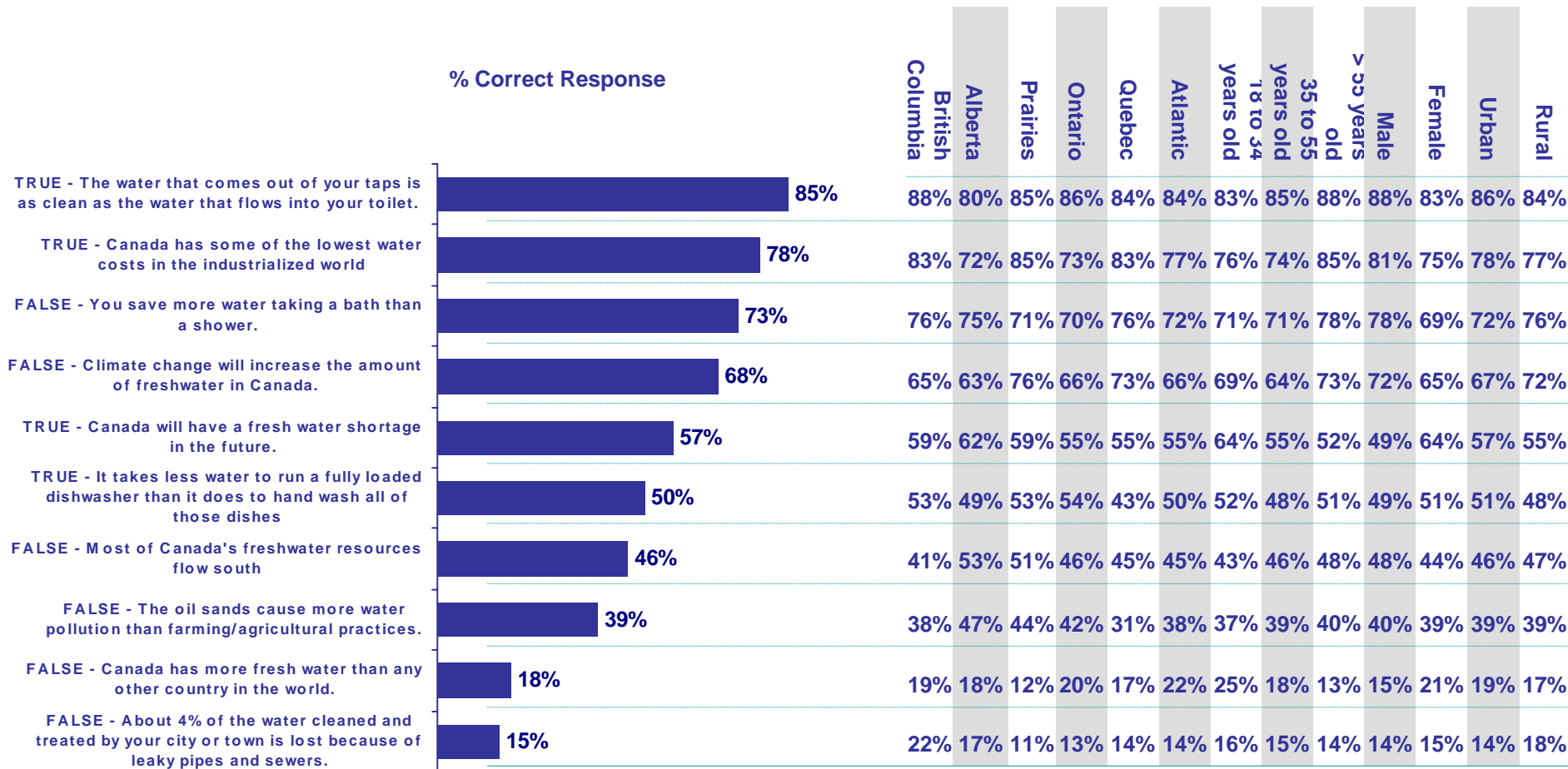
8. And personally how confident are you about the safety and quality of the water in your home?
 Base: All Respondents 2010 n=2022; 2009n = 2165

More Canadians are drinking their tap water as one half (49%) say they typically drink water out of the faucet up from 41% last year. This is likely a function of rising confidence in the safety of water in general.



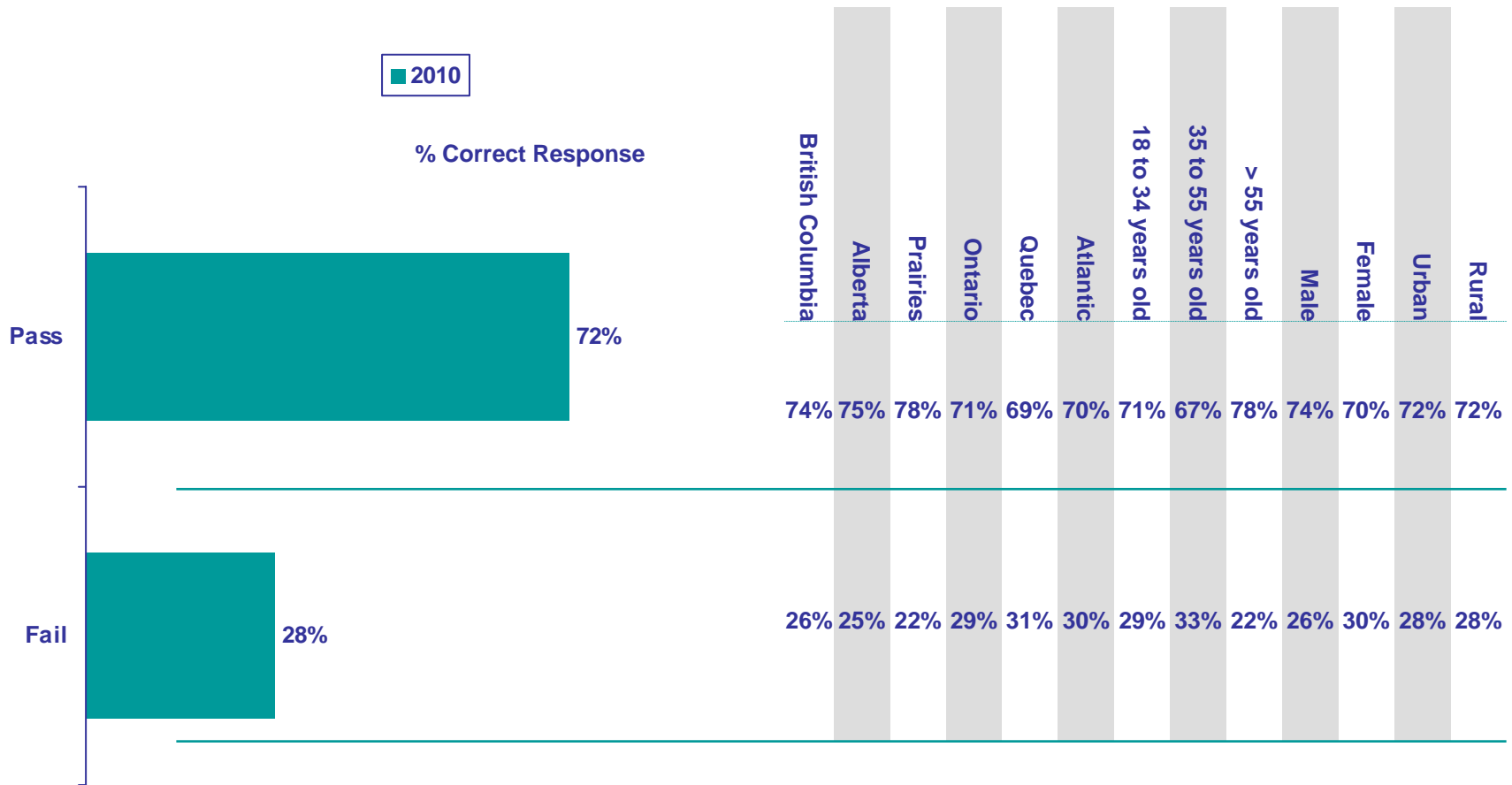
9. In your home, what source of water do you typically drink?
 Base: All Respondents 2010 n=2022; 2009 n = 2165

Canadians performed reasonably well in only 4 of the 10 questions asked.



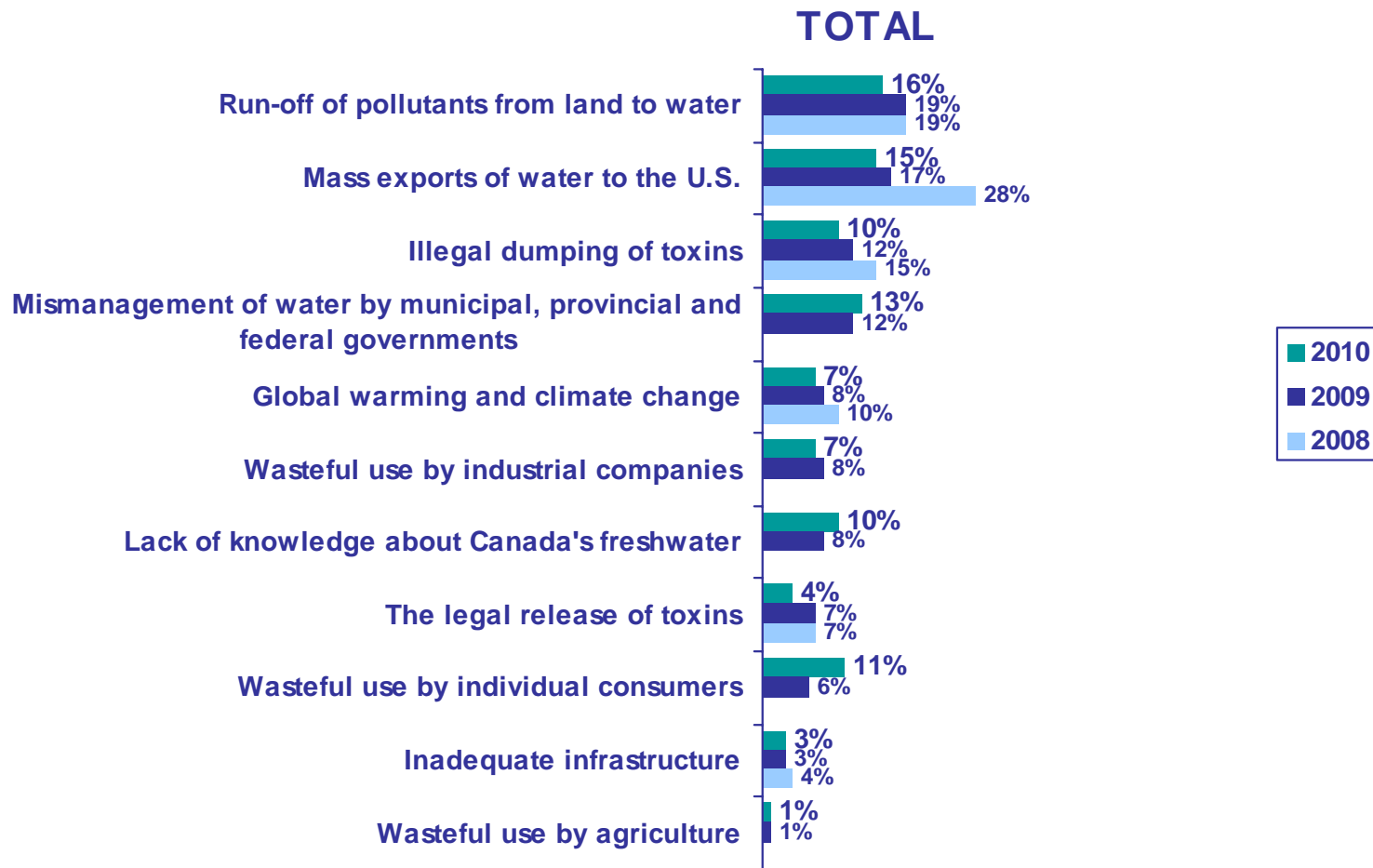
10. Please indicate whether you believe the following to be true or false:
Base: All Respondents n = 2022

Three in ten (28%) Canadians failed the quiz, failing to get at least 5 out of 10 questions correct.



10. Please indicate whether you believe the following to be true or false:
Base: All Respondents n = 2022

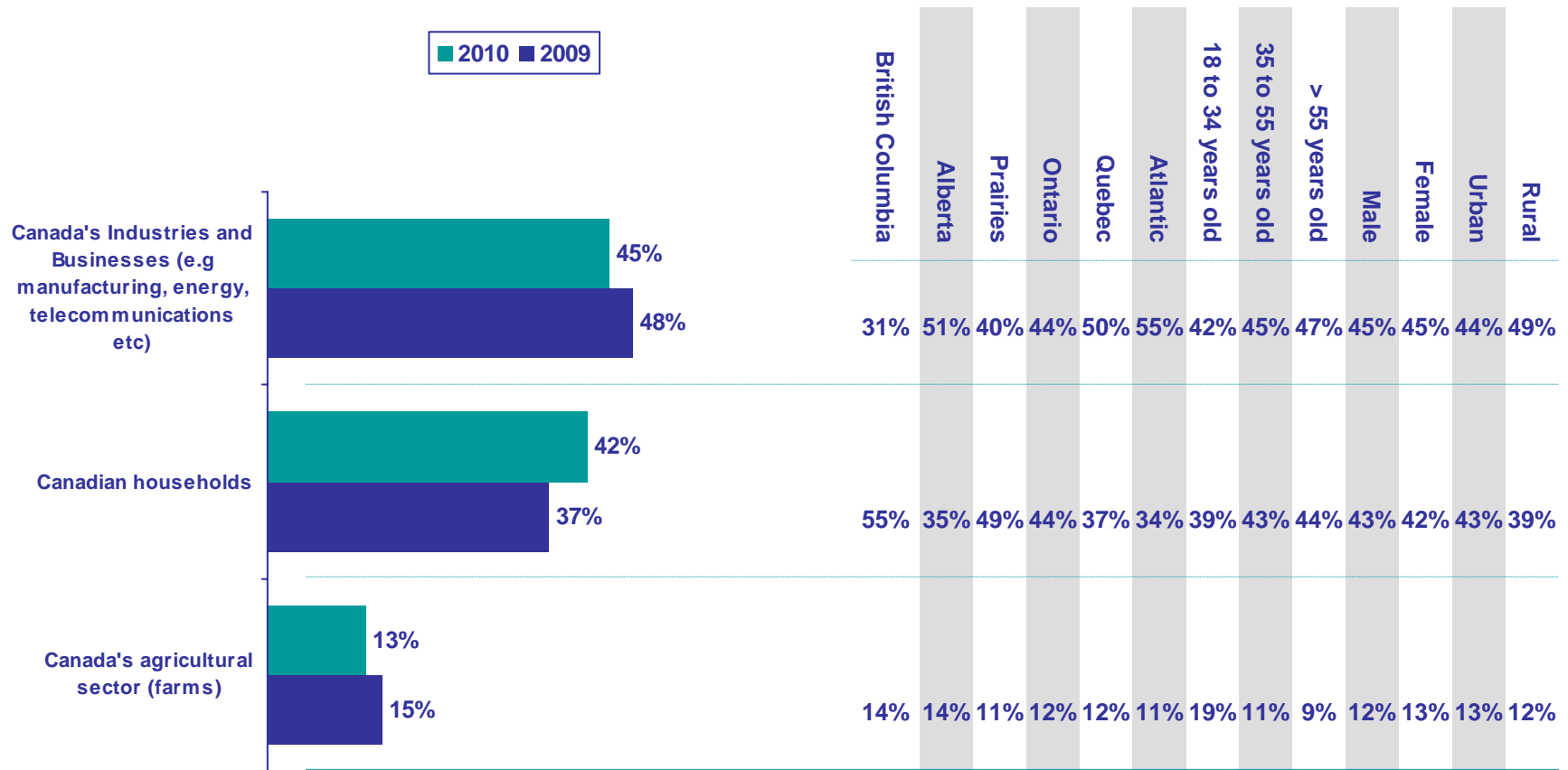
Canadians continue to believe that pollutants and mass exports to the US are the biggest threat to Canada's fresh water supply. However, the proportion of individuals who believe individual consumers are the biggest threat has doubled.



11. What do you think is the biggest threat to Canada's freshwater supply? [select one only]

Base: All Respondents 2010 n=2022; 2009 n = 2165, 2008 n = 2309

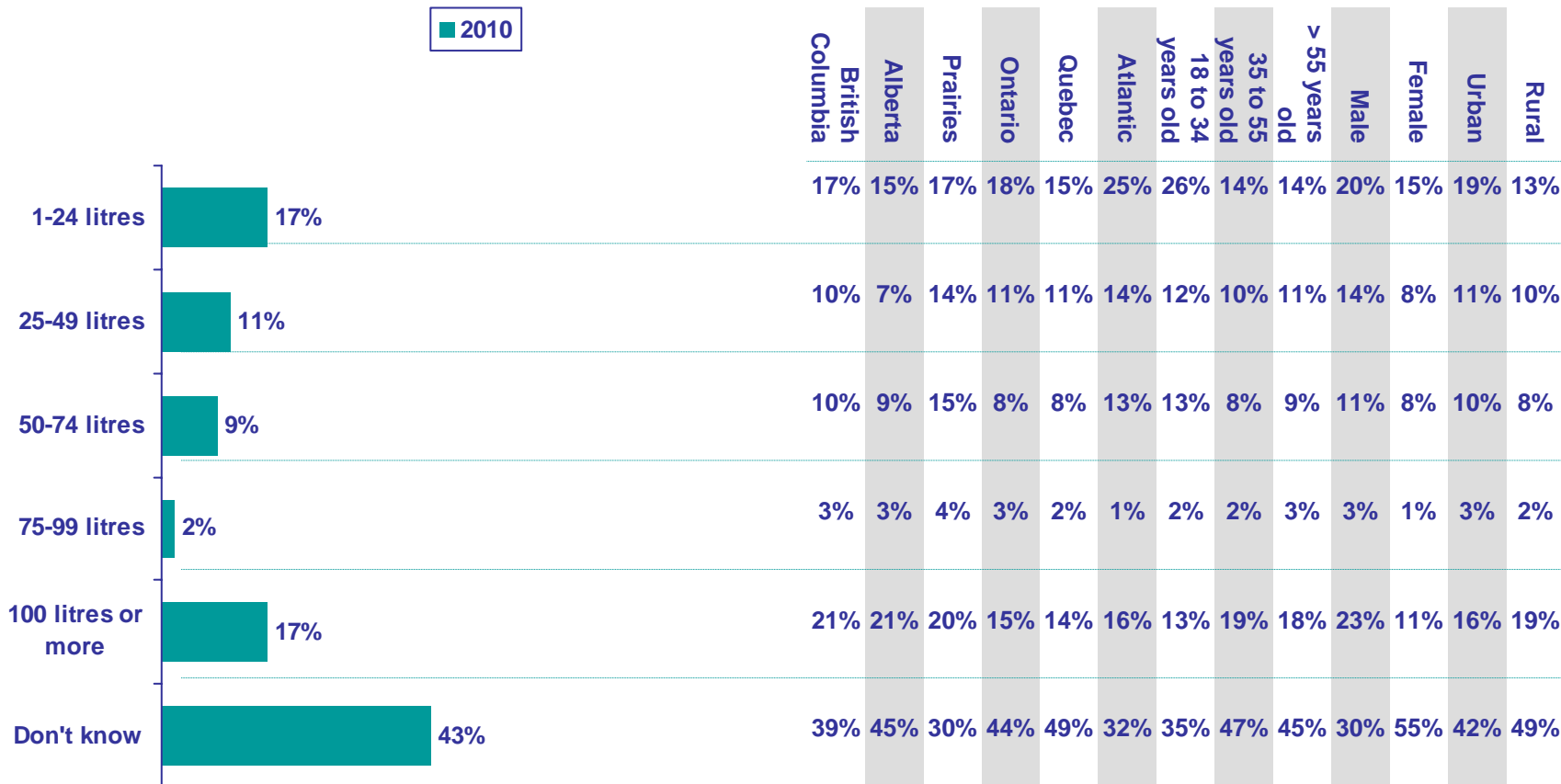
More Canadians than last year believe that households use the most fresh water, now statistically tied with Canada's industries. Few believe agriculture uses the most.



12. Which one of the following do you believe uses the most fresh water?
 Base: All Respondents 2010 n=2022; 2009 n = 2165

Total Amount of Water You Use Personally in an Average Day

- Last year Canadians thought they consumed about 66 litres a day. This year they think they consume 79 litres a day, on average.

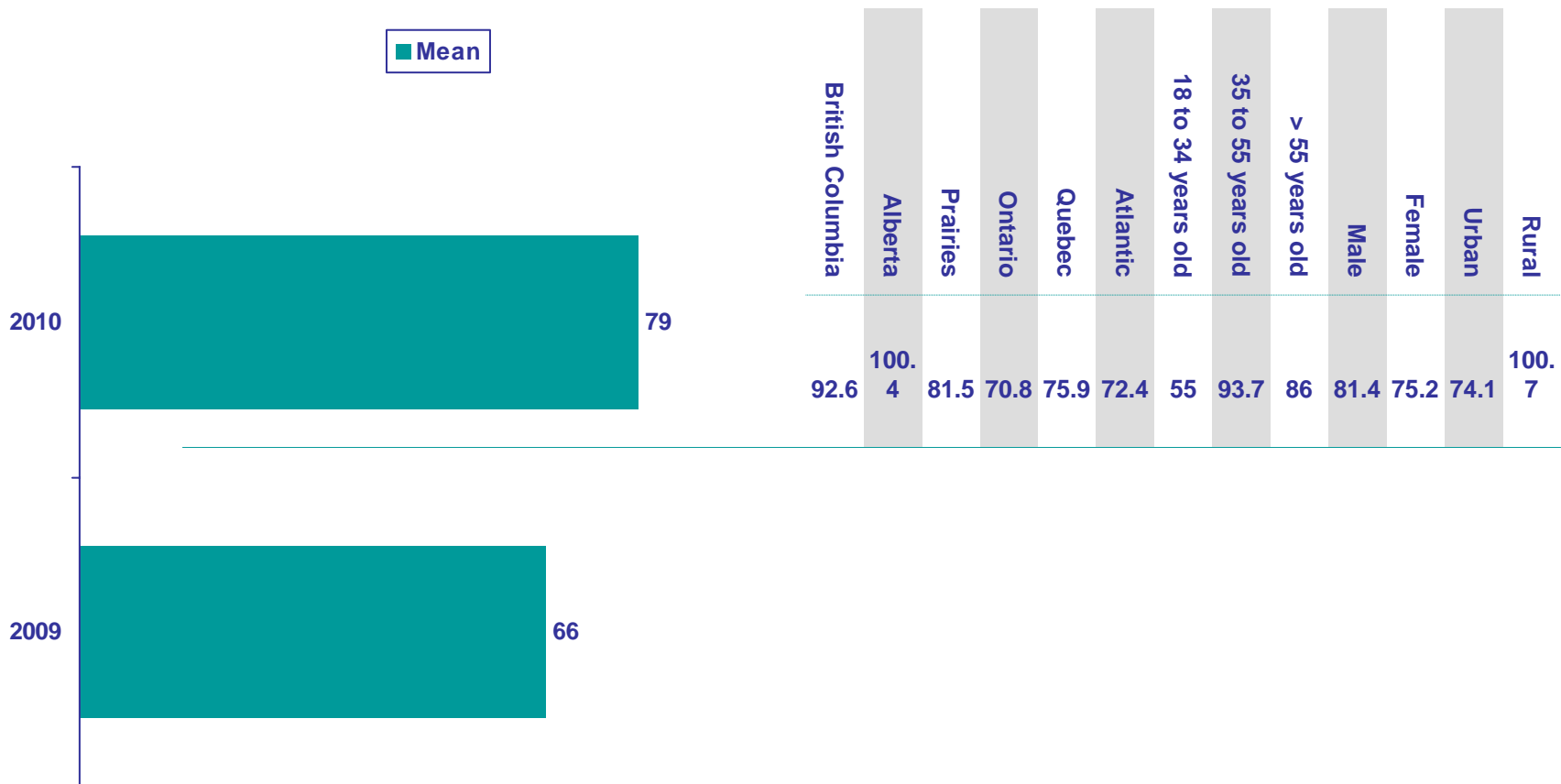


2010: 79 litres a day
2009: 66 litres a day

13. If you had to guess, what do you think is the total amount of water you personally use in an average day including drinking, showering, bathing, toilet flushing, laundry, dish washing etc. Base: All Respondents 2010 n=2022

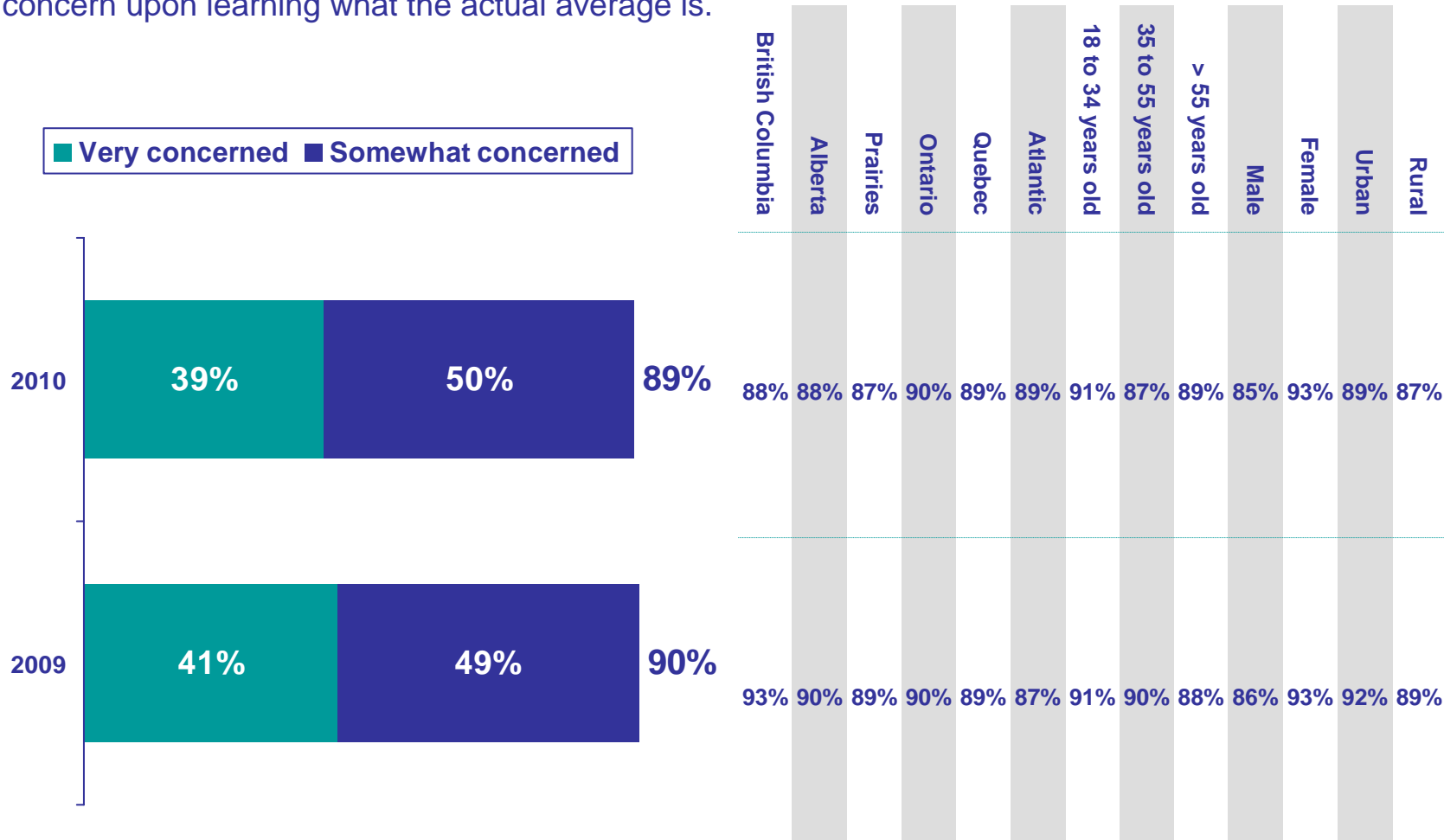
Total Amount of Water You Use Personally in an Average Day

- Albertans think they use the most (100 litres a day), while Ontarians think they use the least (71 litres a day). Rural Canadians think they use more (101 litres a day) than urban Canadians (74 litres a day). Interestingly, Canadians aged 18 to 34 think they use the least (55 litres a day), by far.



13. If you had to guess, what do you think is the total amount of water you personally use in an average day including drinking, showering, bathing, toilet flushing, laundry, dish washing etc. Base: All Respondents 2010 n=2022

After hearing about the average Canadian's use of water (329 litres), most are concerned about Canadians' water usage. Interestingly, there is no correlation between amount of water they think they use and their level of concern upon learning what the actual average is.



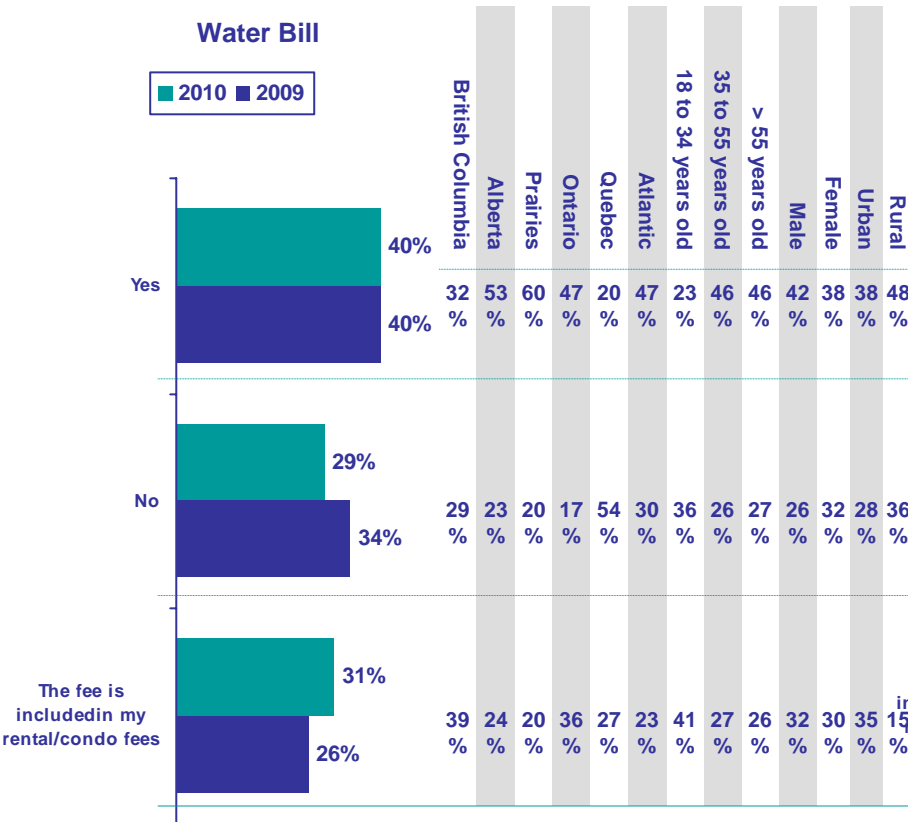
14. In fact, Canadians on average use 329 liters of water per person, each day. This is twice the amount used by Europeans who enjoy a similar standard of living. How concerned are you about Canadians' water usage? Base: All Respondents 2010 n=2022; 2009 n = 2165



Only four in ten (40%) know what they pay for their water, much less than the proportion (74%) that knows what they pay for electricity.

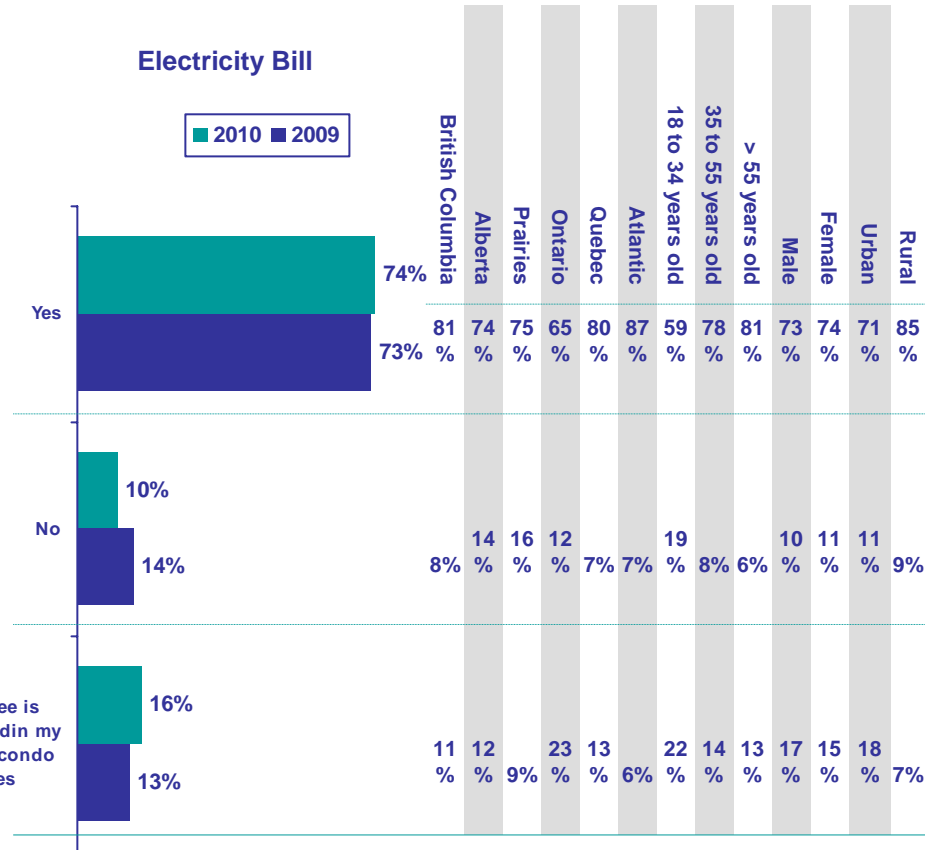
Water Bill

■ 2010 ■ 2009



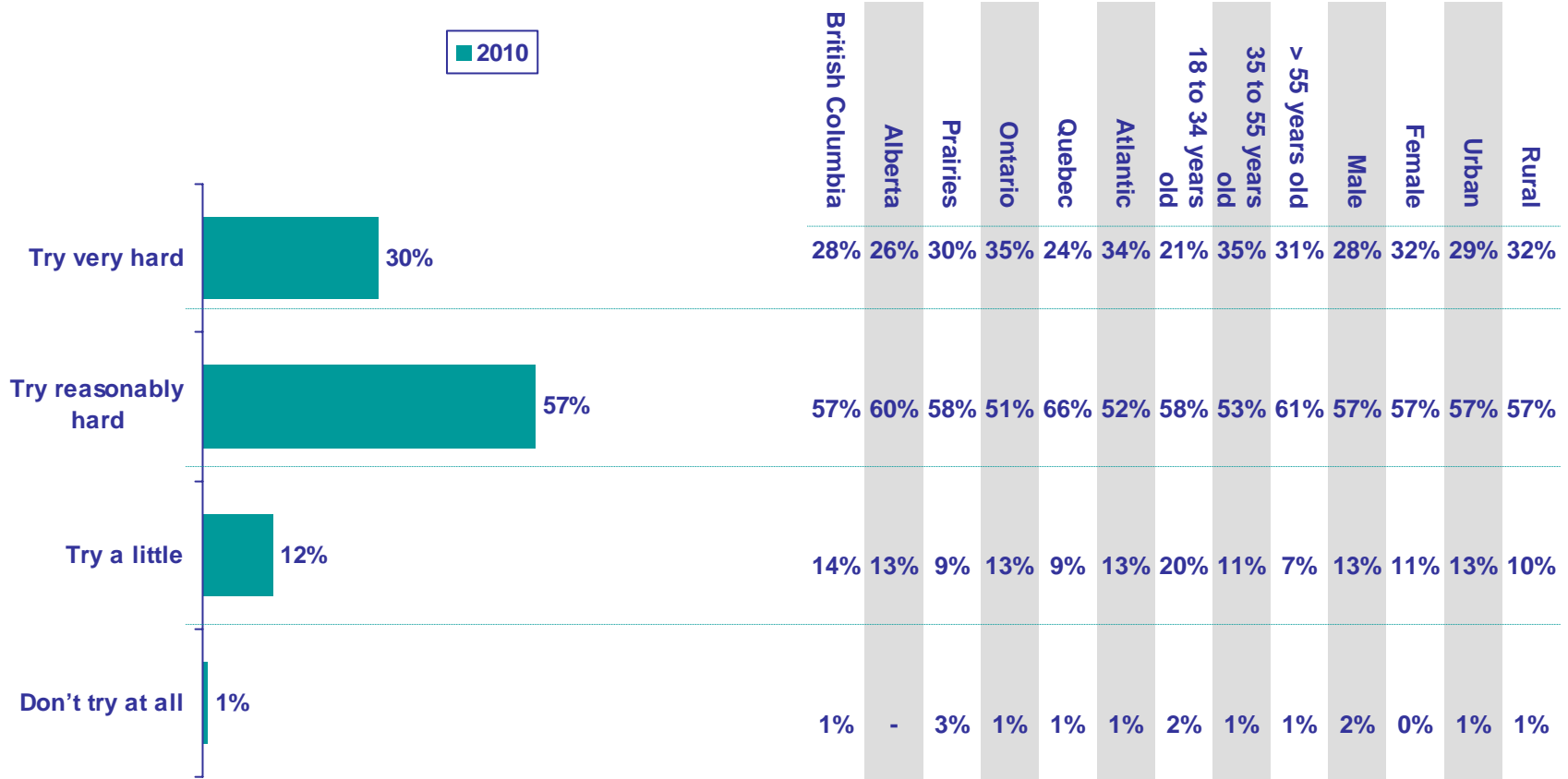
Electricity Bill

■ 2010 ■ 2009



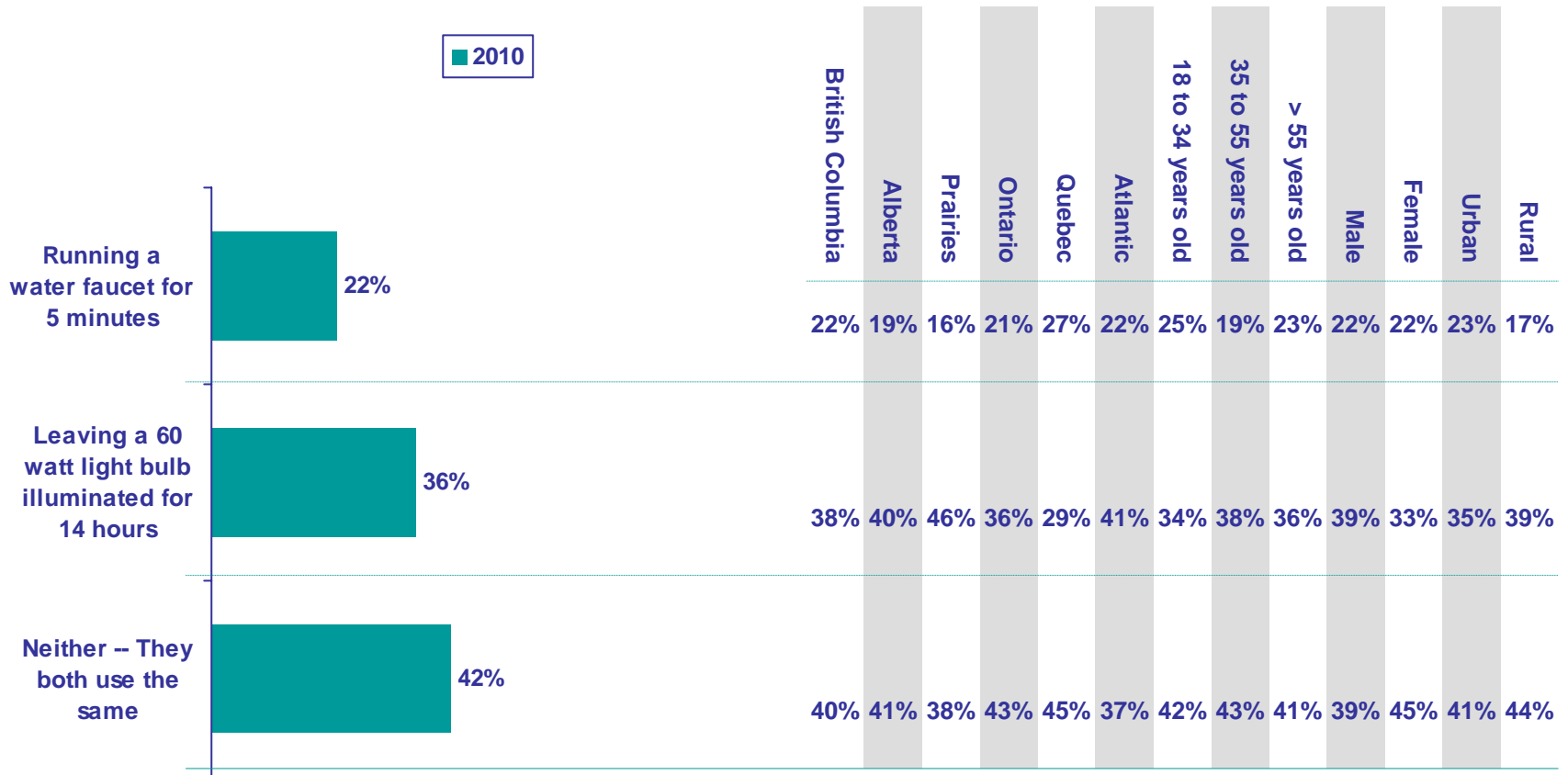
15. Do you know how much you pay for the following each month?
 Base: All Respondents 2010 n=2022; 2009n = 2165

Eight in ten (87%) say they try at least reasonably hard to conserve electricity in their daily activities, higher than the 78% who say they try at least reasonably hard to conserve water in their daily activities.



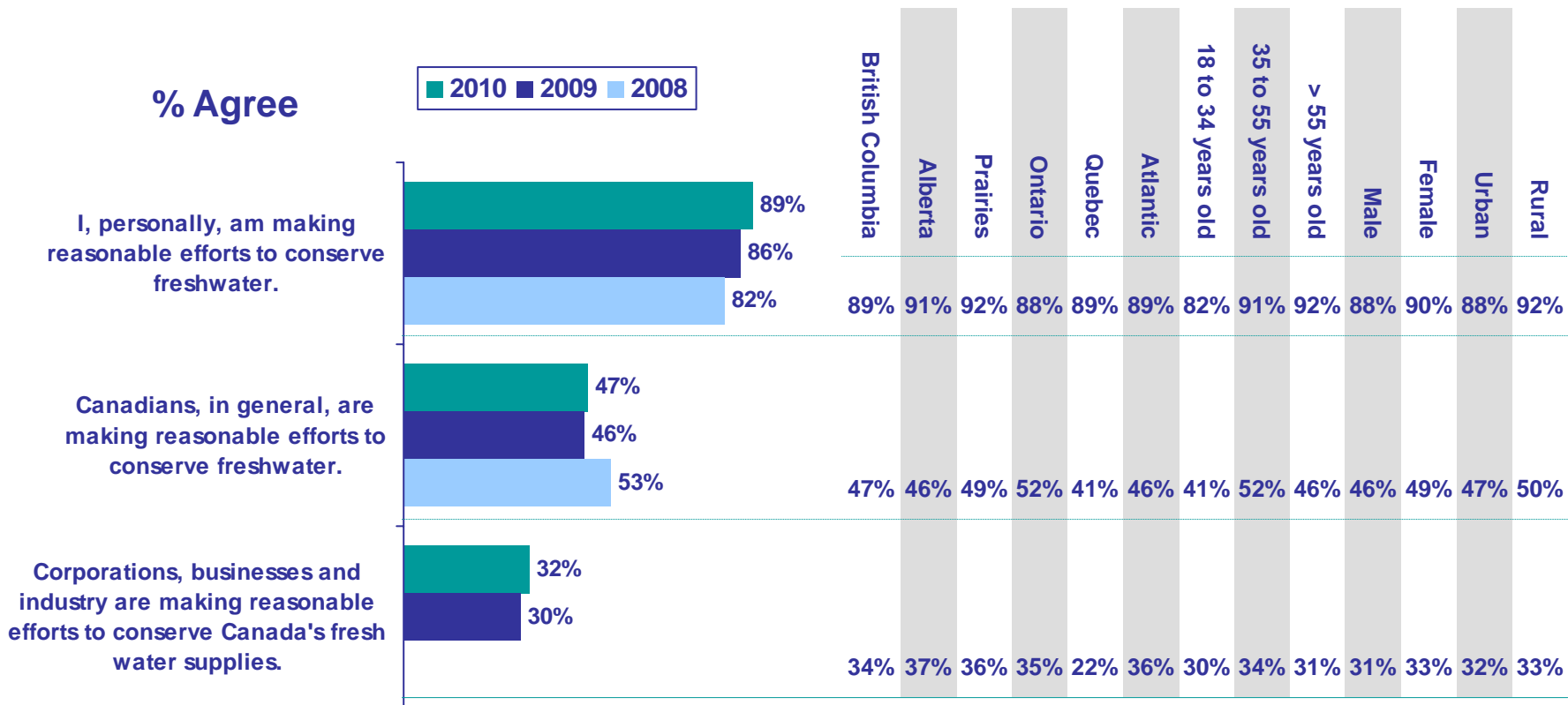
16. To what extent do you, personally, try to conserve electricity in the course of your daily activities involving electricity?
 Base: All Respondents n = 2022

More believe leaving a light on for 14 hours takes more energy than running a water faucet for 5 minutes. However four in ten (42%) were not stumped and knew they're both the same in terms of energy use.



17. Which do you think uses more energy
Base: All Respondents n = 2022

Canadians are passing the buck when it comes to water conservation. They think they're doing a decent job, but that others are not.

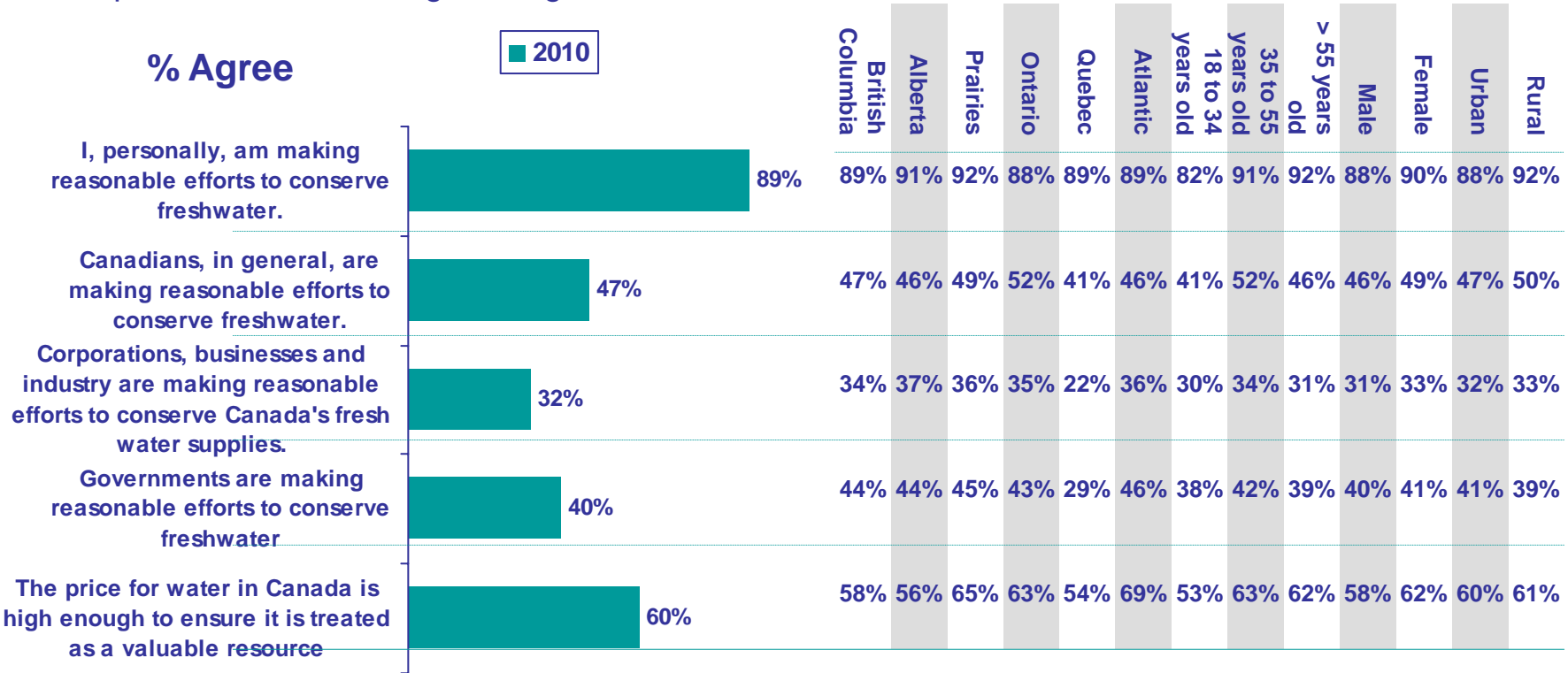


18. Do you agree or disagree with following statements.
Base: All Respondents 2010 n=2022; 2009 n = 2165

Most people think that they're doing an adequate job of conserving freshwater, but don't believe the same applies to Canadians in general, corporations, or governments. Just six in ten (60%) believe the price for water is high enough to ensure it isn't wasted. Conversely, four in ten likely believe waste occurs because the price for water isn't high enough.

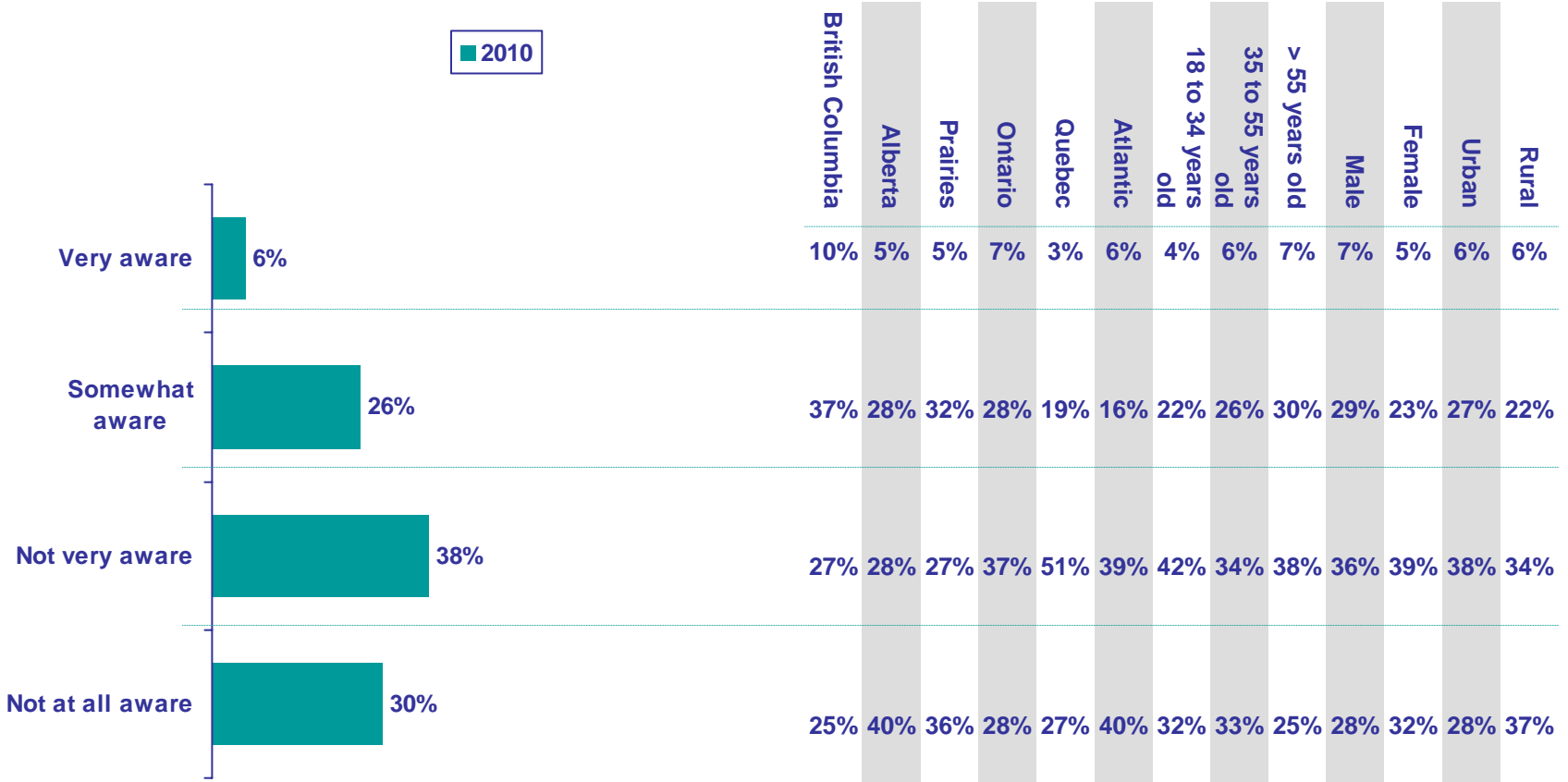
% Agree

■ 2010



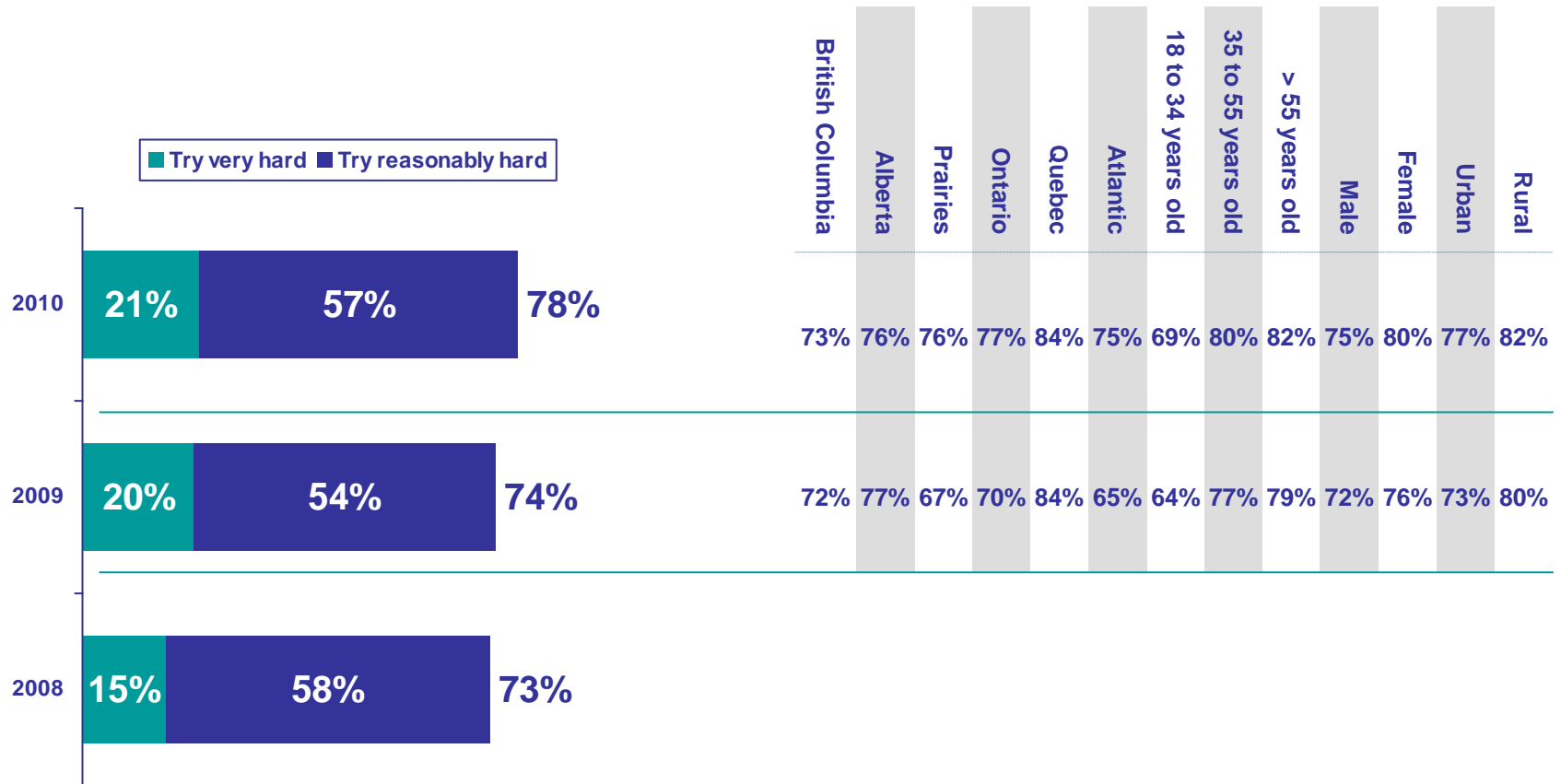
18. Do you agree or disagree with following statements.
Base: All Respondents 2010 n=2022

Awareness of local government initiatives to conserve water are low, although awareness is higher in some regions such as British Columbia (10%) and Ontario (7%).



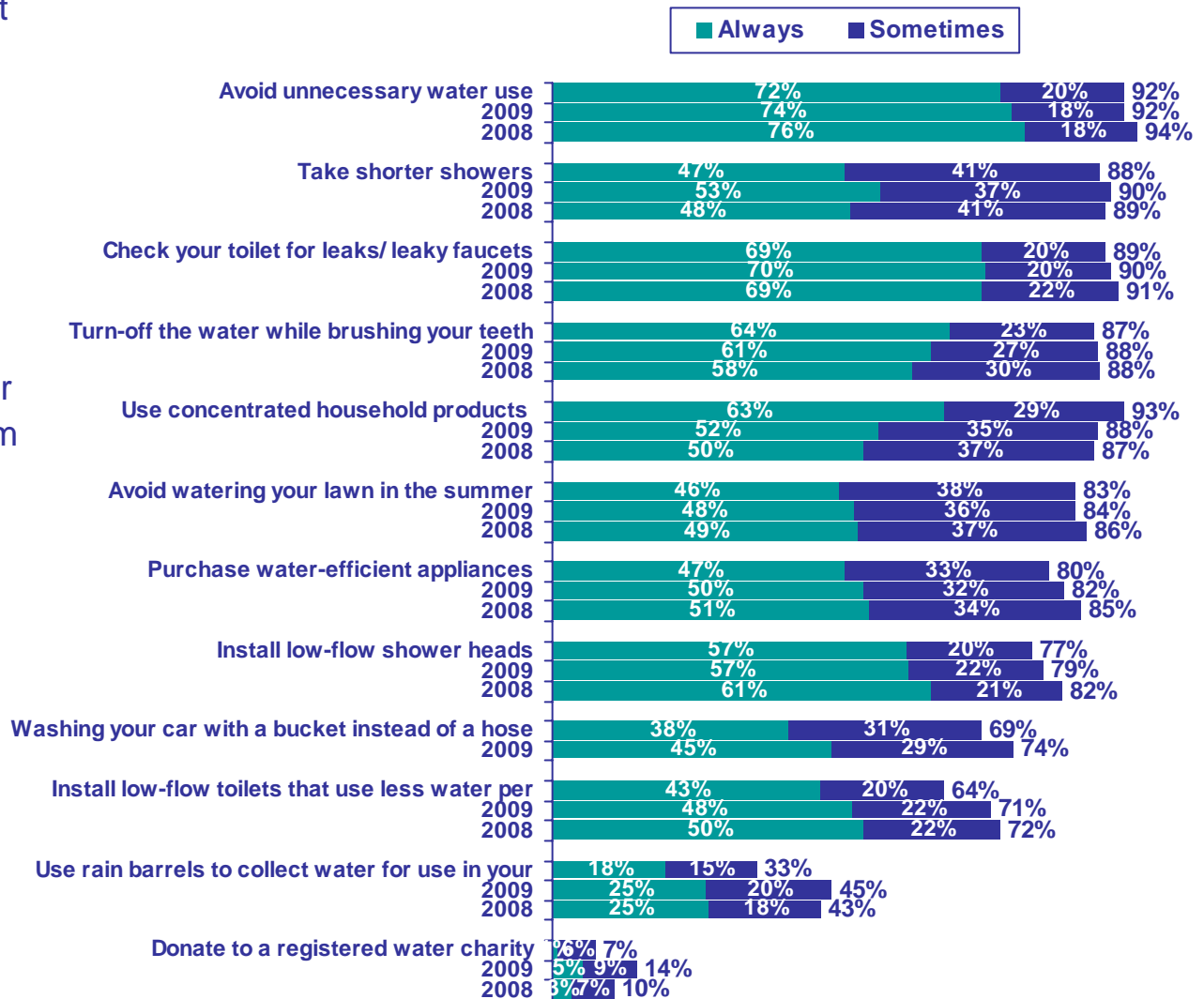
19. Are you aware of any initiatives that your local government is undertaking in order to encourage its citizens to conserve water?
 Base: All Respondents n = 2022

Most believe they try at least reasonably hard to conserve water, slightly more than last year. Interestingly, the likelihood of believing this increases with age. Interestingly, those who know how much their water bill is are more likely (83%) to say they make reasonable efforts to conserve water.



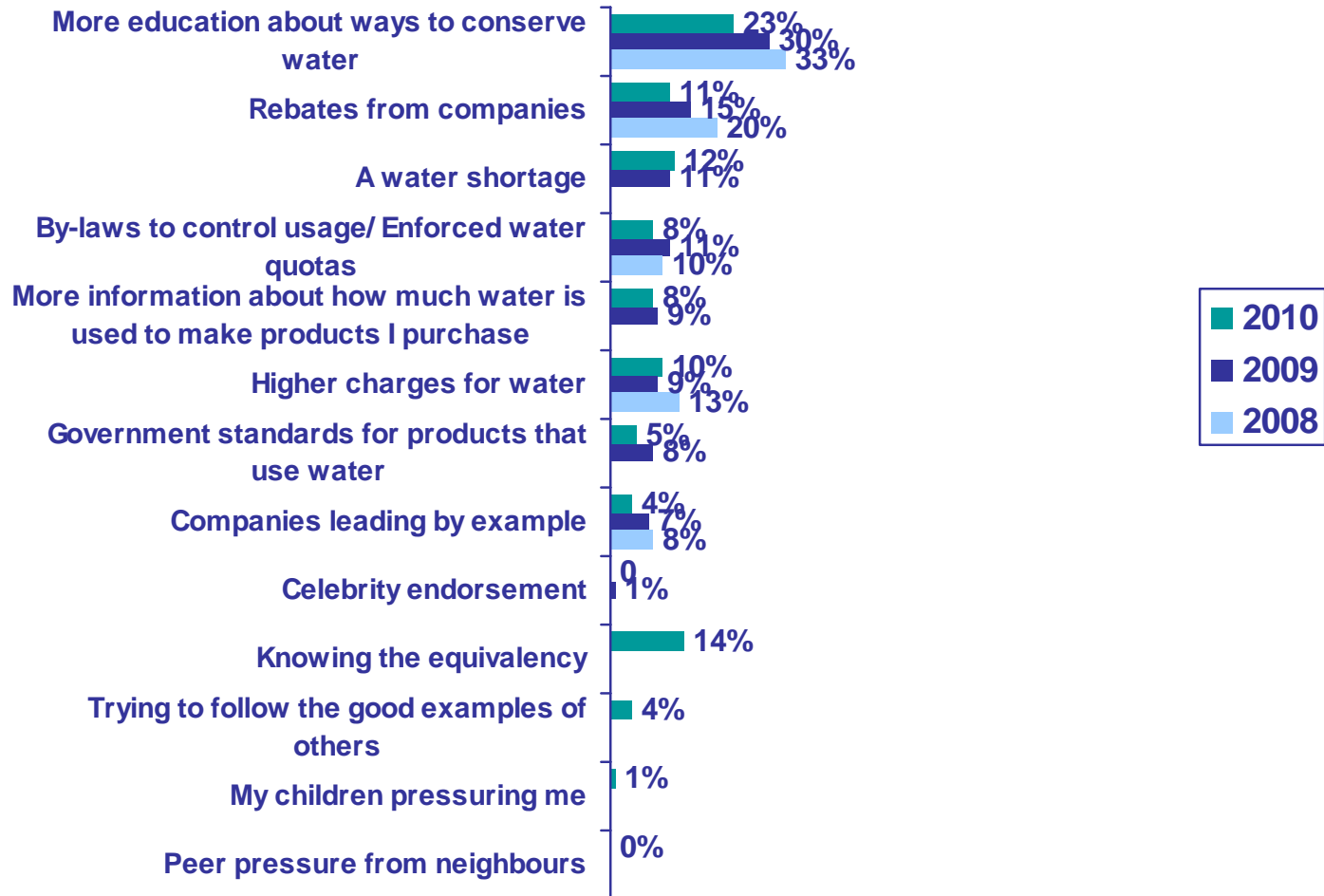
20. To what extent do you, personally, try to conserve freshwater in the course of your daily activities involving water use?
 Base: All Respondents 2010 n=2022; 2009 n = 2165

- Conservation habits have not changed much over the past year.
- Slightly more now use concentrated household products at least sometimes.
- Fewer are using low-flow toilets and rain barrels.
- Donations to registered water charities are down to 7% from 14%.



21. Now, thinking about this same list, what do you do to help conserve freshwater?
 Base: All Respondents 2010 n=2022; 2009 n = 2165, 2008 n=2309

More Canadians say that education, not necessarily rebates, would encourage them to conserve more fresh water – unchanged from last year. One in ten (14%) say that knowing the equivalency of what they're saving in water usage would help them conserve more freshwater (new addition this year).



22. Which of the following would be the most likely to encourage you to conserve more freshwater?
 Base: All Respondents 2010 n=2022; 2009 n = 2165, 2008 n = 2309

The Hypocrisy of Secret Pleasures

Canadians are angered to see others doing many of these things, but many do them themselves. The most newsworthy are those that are most upsetting to see but many people still do: hosing down their driveways appears to be the biggest secret pleasure, along with running water in the kitchen and when brushing teeth.

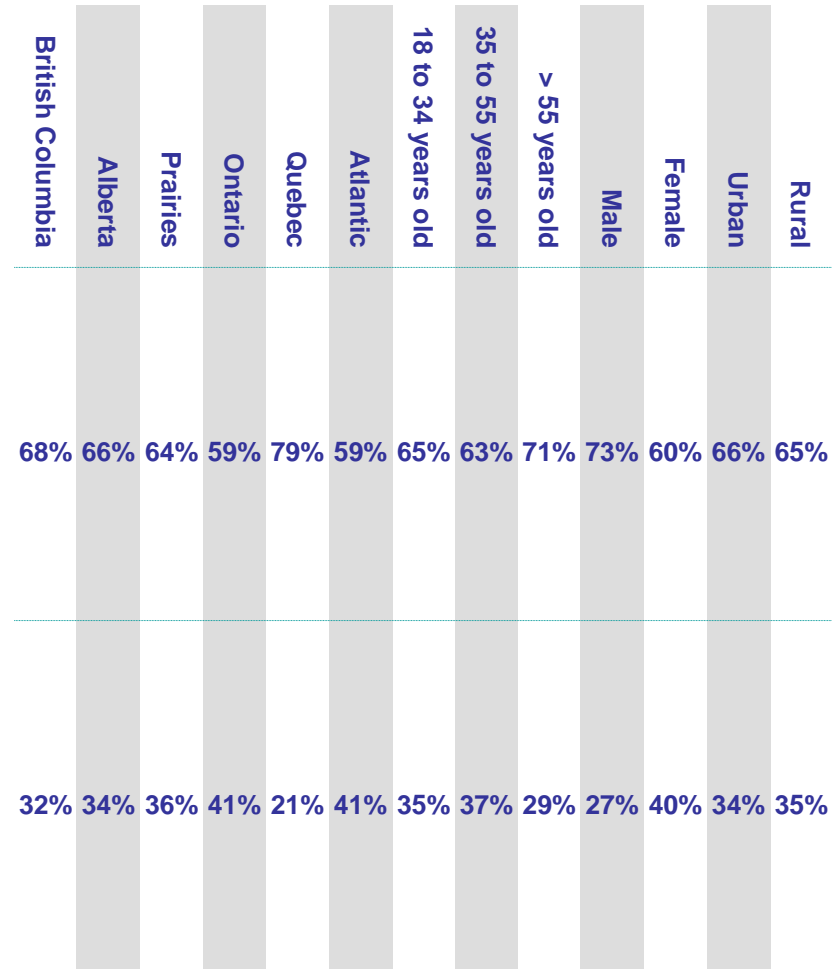
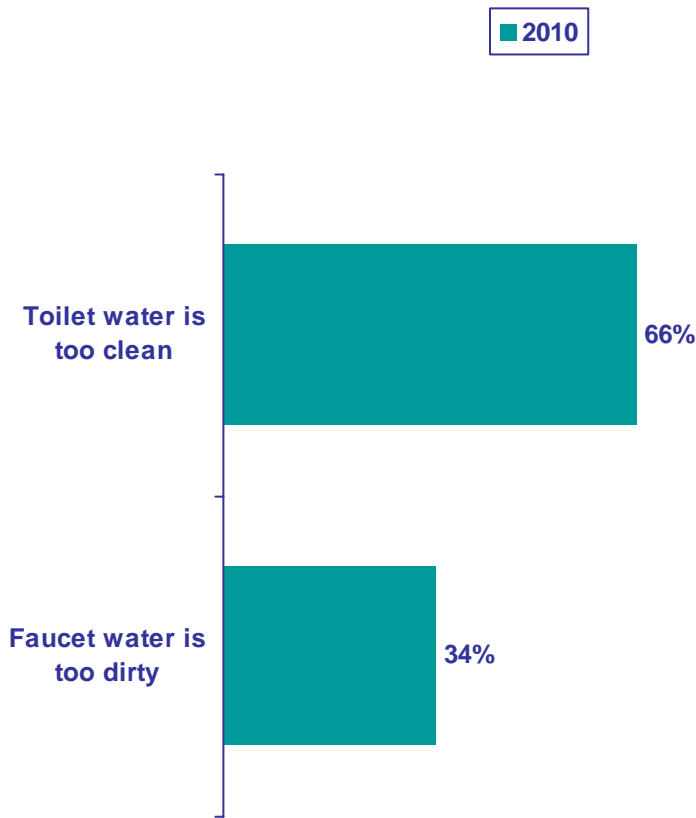


23. Which of the following two activities upset you the most? When you see people...

24. And which of the following have you knowingly done?...

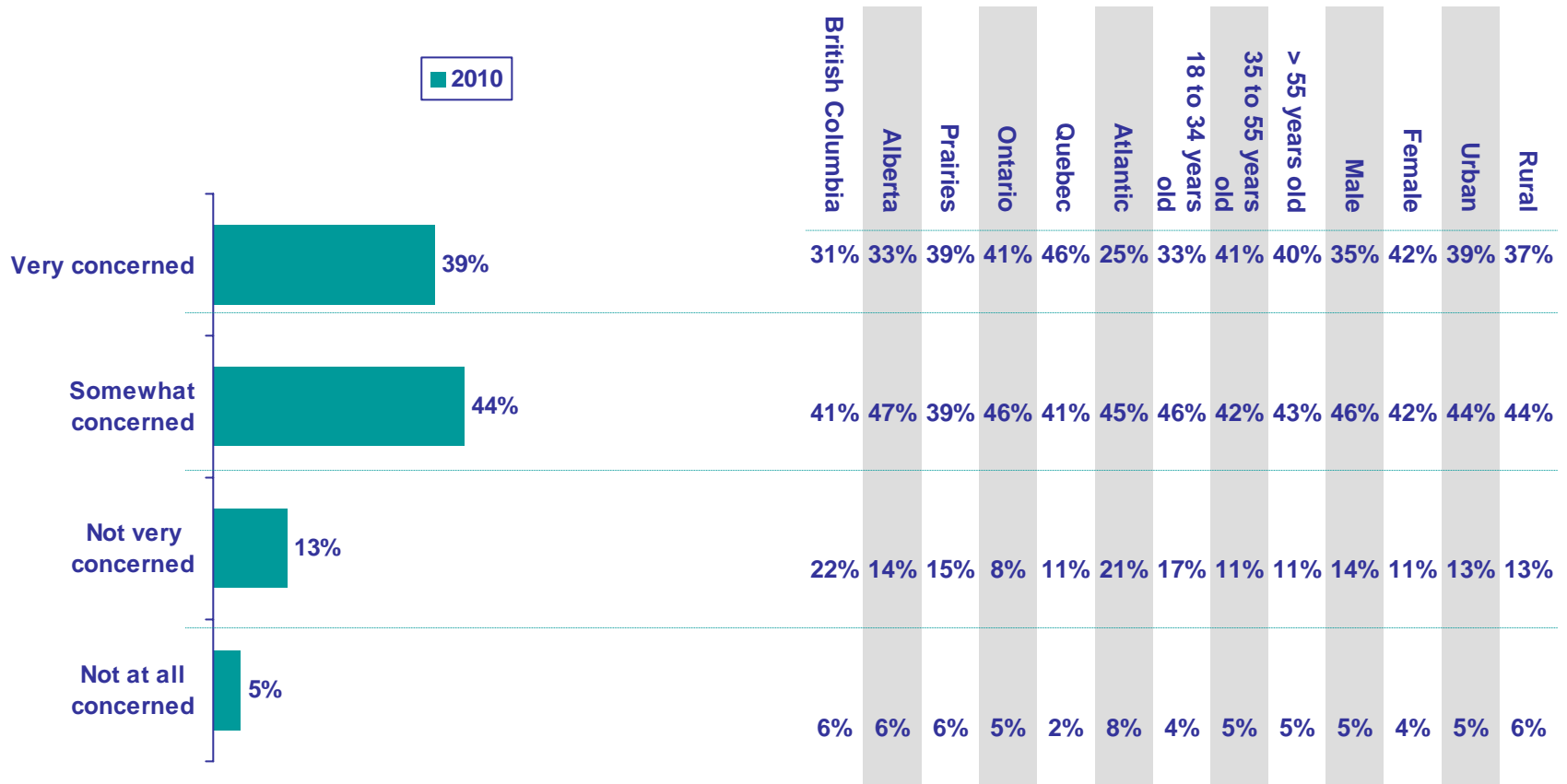
Base: All Respondents n=2022

After learning that toilet water and tap water is the same water, two in three think toilet water is too clean, while one in three believe faucet water is too dirty.



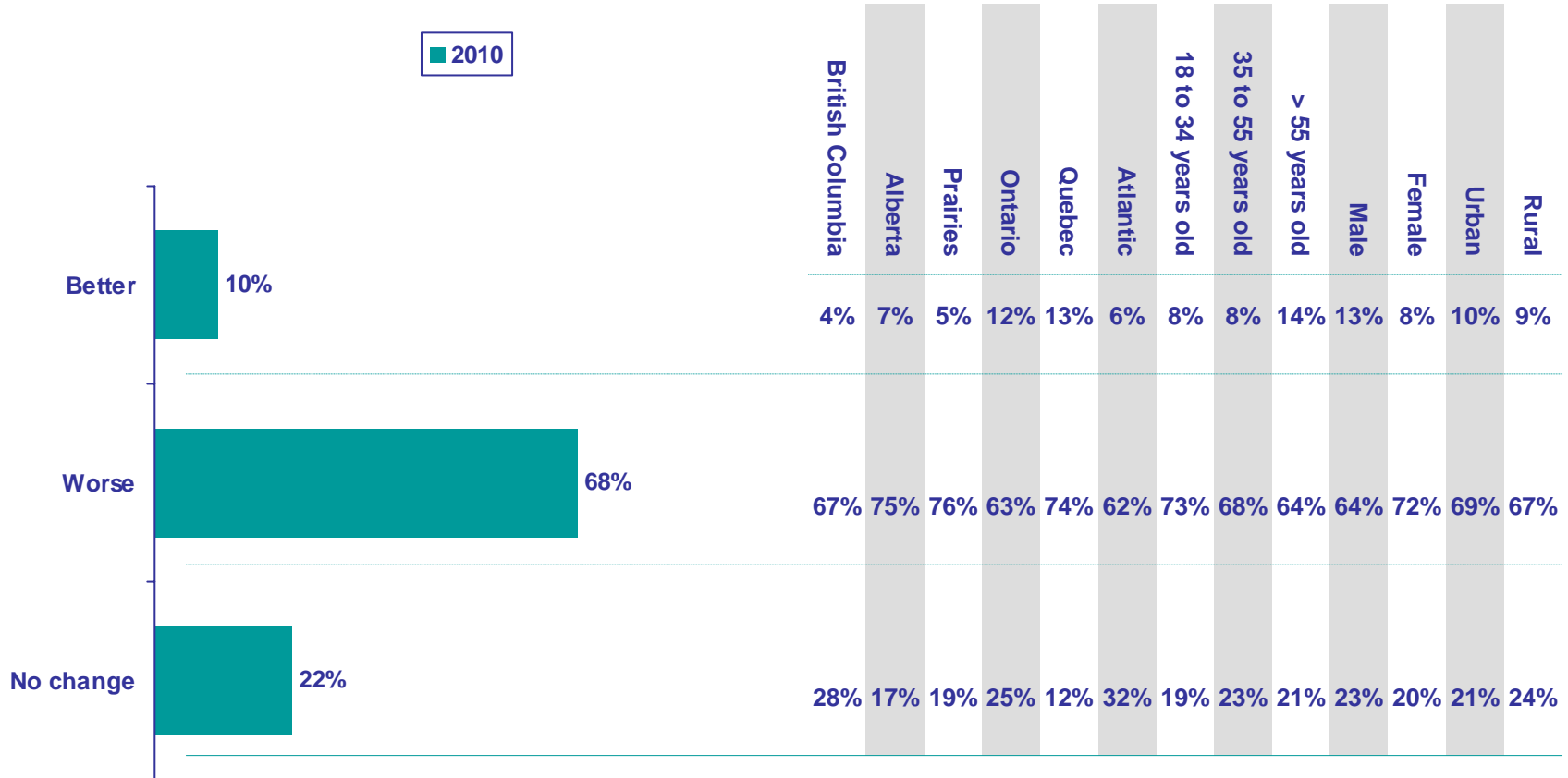
25. The water the fills your toilet bowl is the same quality as the water that comes out of your sink tap...Which is closer to your point of view?
 Base: All Respondents n = 2022

Eight in ten (83%) are concerned about the quality of water in lakes where they swim. Quebecers and Ontarians are the most likely to be concerned.



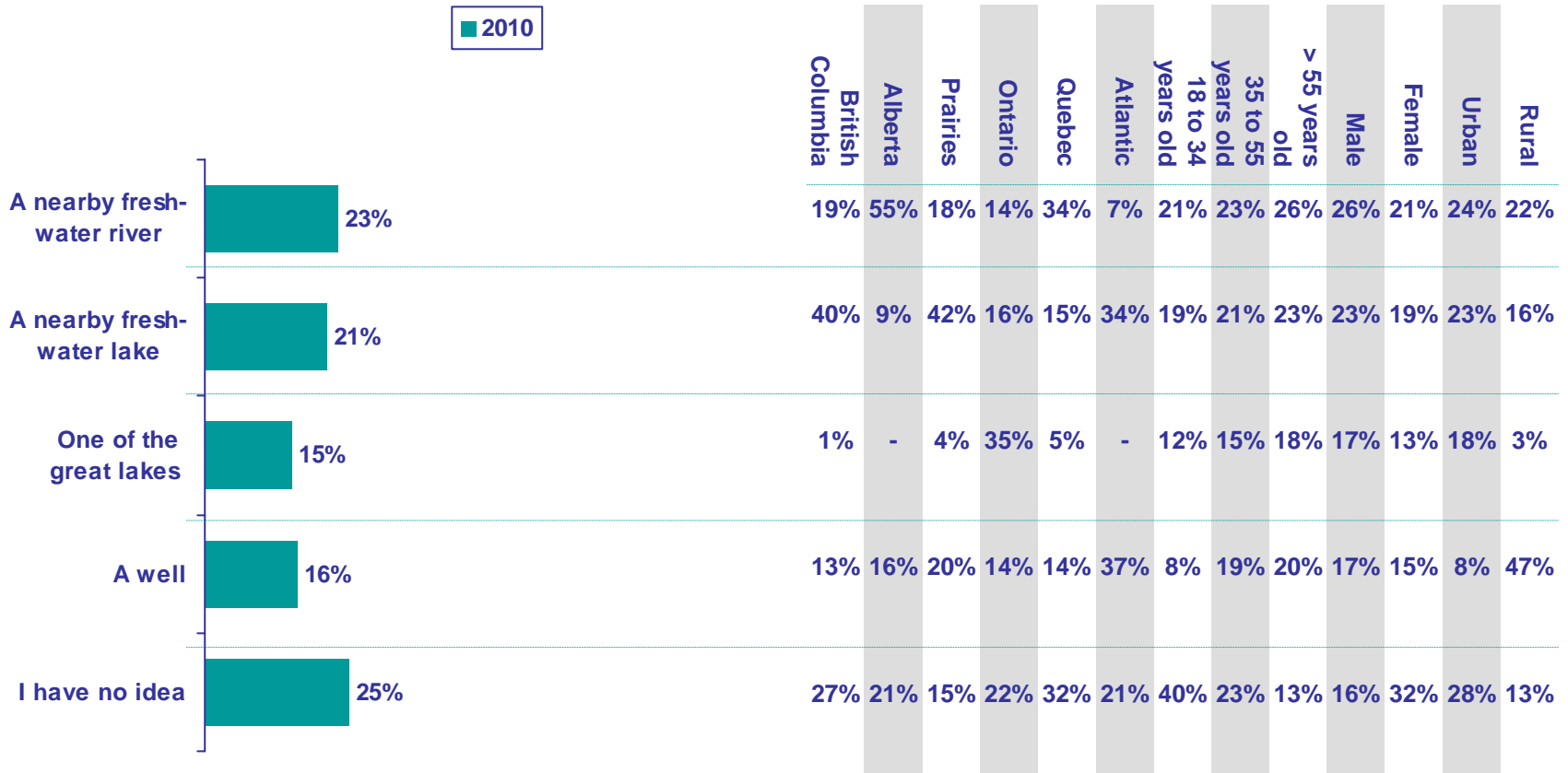
26. How concerned are you about the quality of water in the lakes in which you swim?
Base: All Respondents n = 2022

Most (68%) believe that the quality of these lakes is actually getting worse, not better (10%).



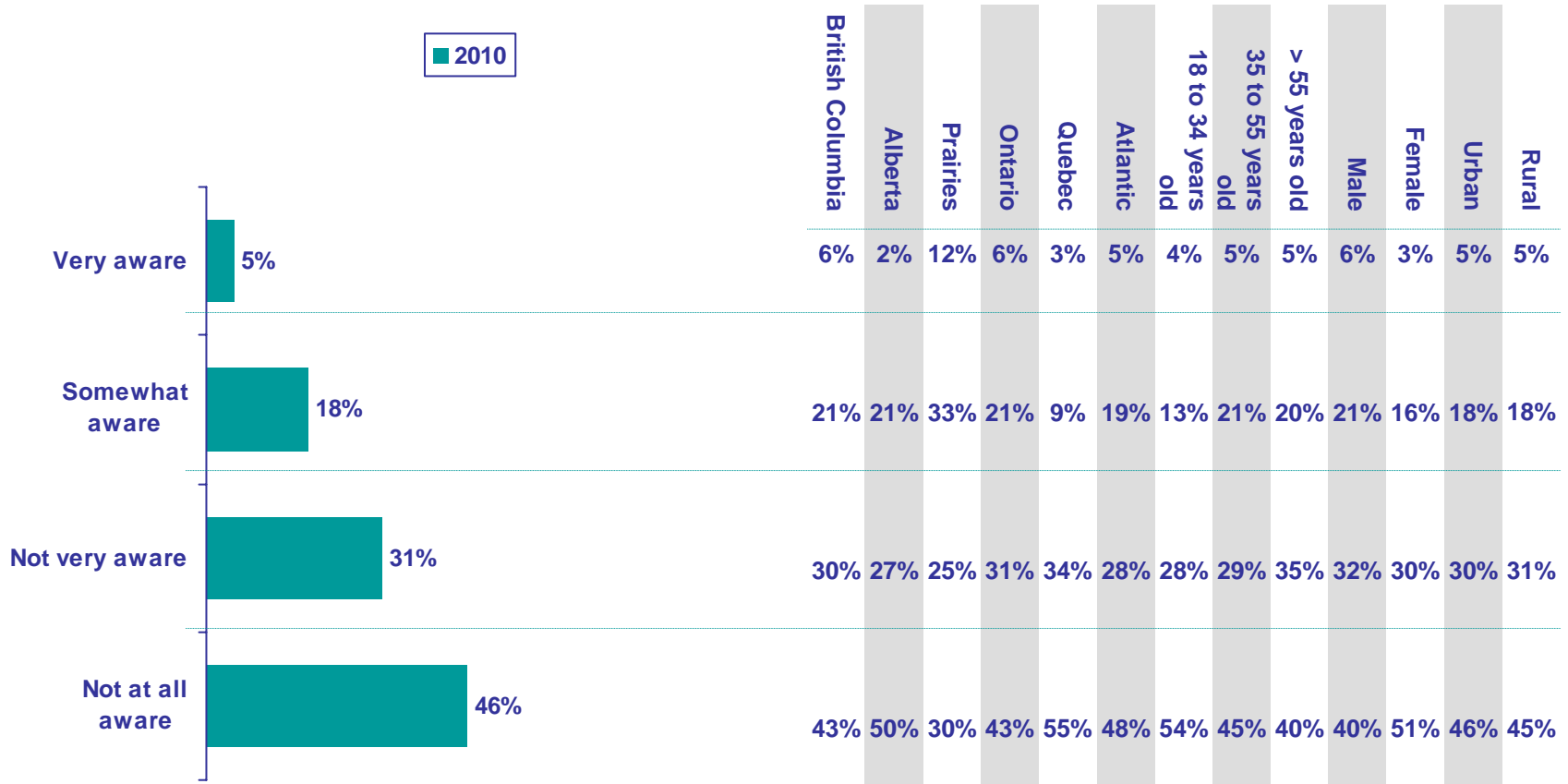
27. Do you think that the quality of the water in these lakes is getting:?
Base: All Respondents n = 2022

One quarter of Canadians have no idea from where the water that flows out of their taps comes. Quebecers are the most likely to admit that they don't know.



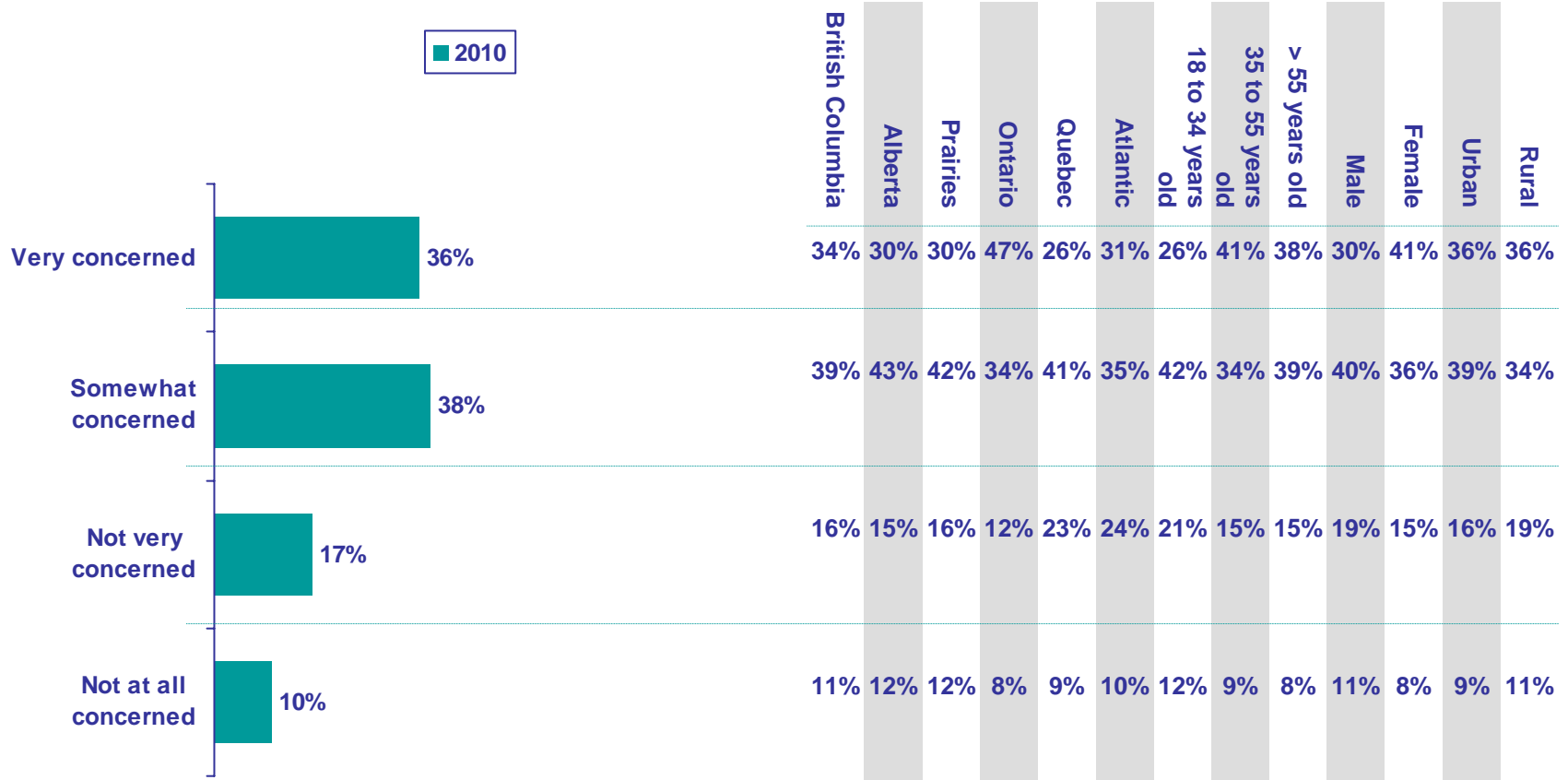
28. What is the original source of the drinking water for where you live?
Base: All Respondents n = 2022

Very few say they're aware of the water quality on First Nation reserves, but awareness is significantly higher in the Prairies, very low in Quebec.



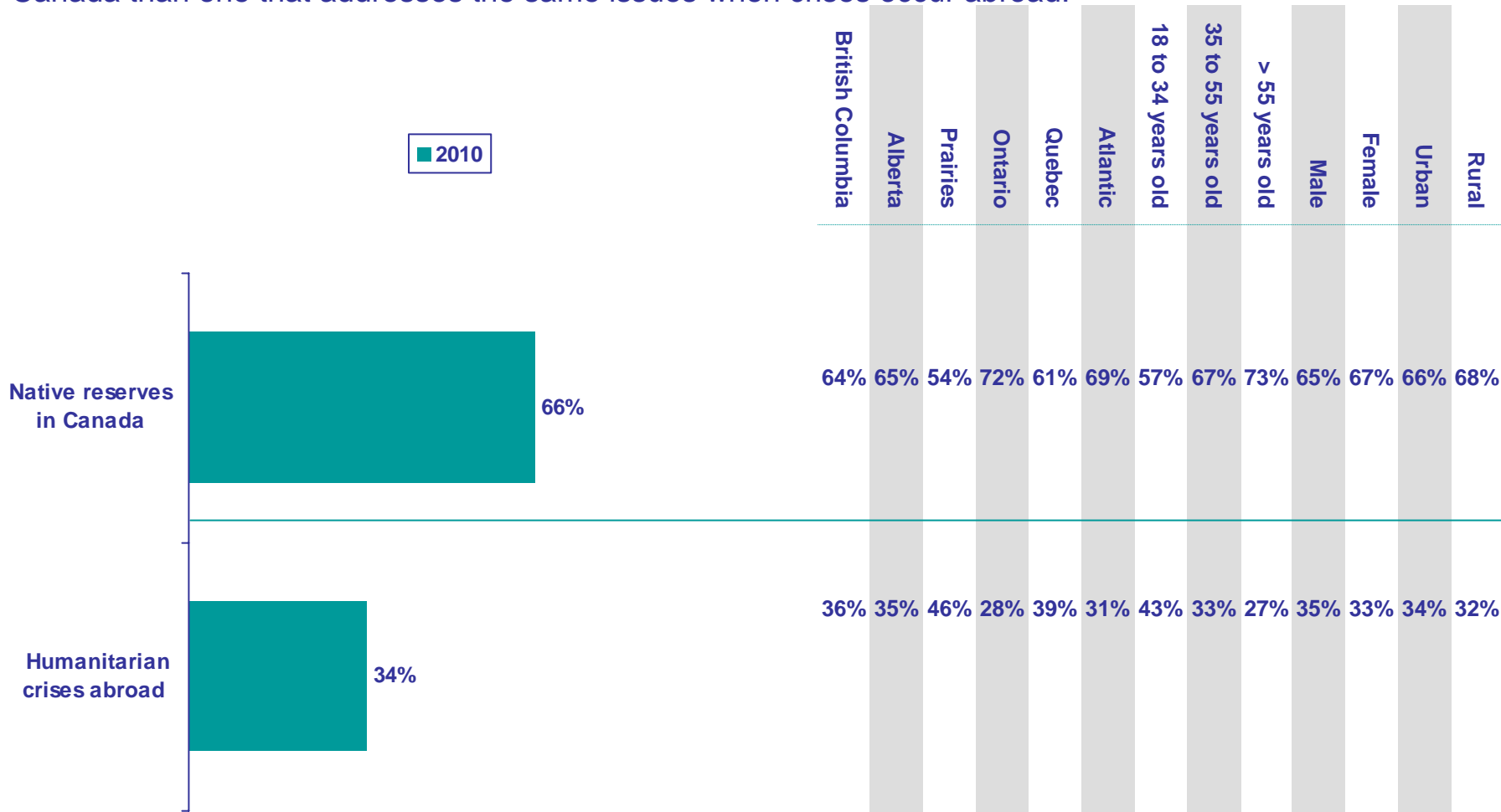
29. Which best describes your level of awareness regarding the quality of water on First Nation reserves?
 Base: All Respondents n = 2022

Most Canadians (74%) are concerned with the water condition on aboriginal reserves, with four in ten (36%) being very concerned.



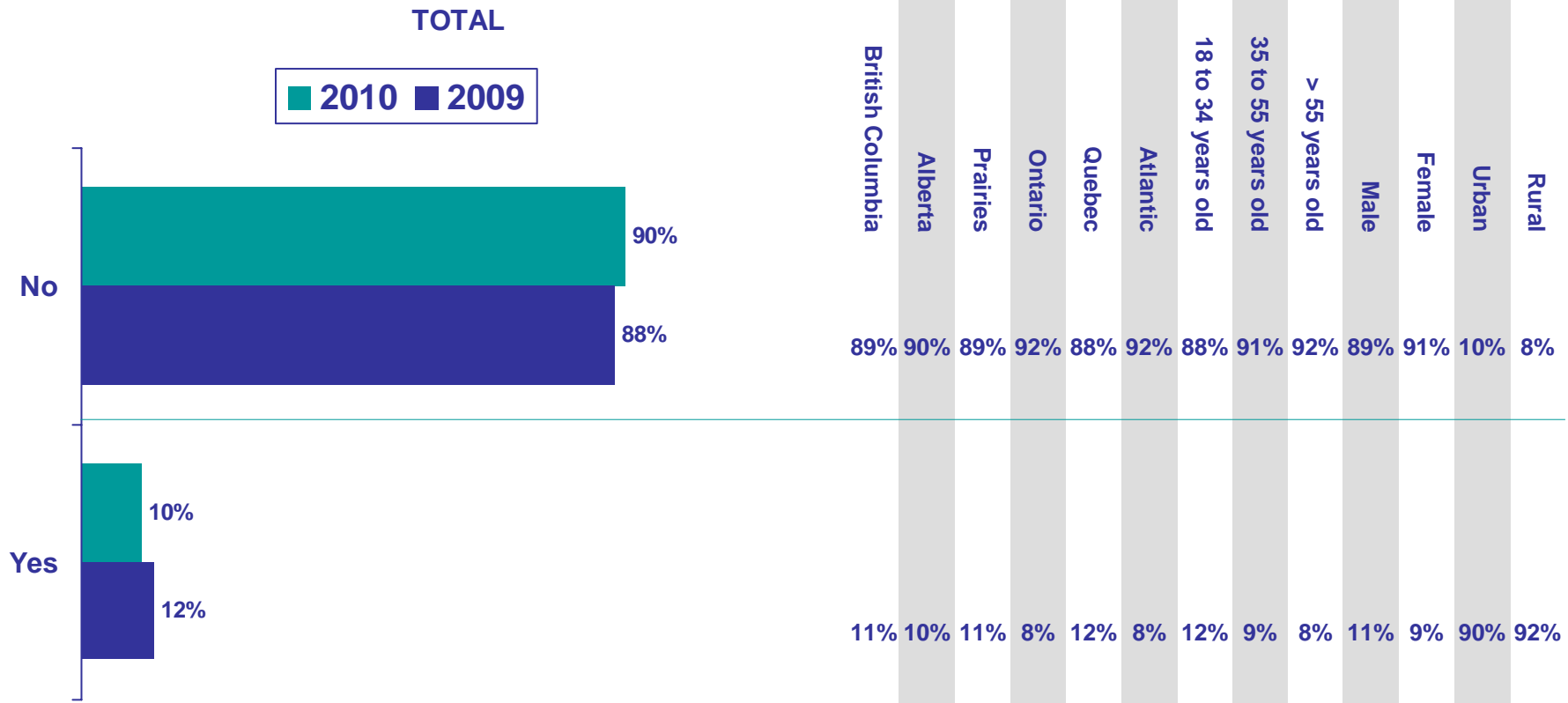
30. In Canada, almost 100 aboriginal reserves must boil their water before it is safe to drink. Some reserves have been under boil-water advisories for years. How concerned are you about the water conditions on aboriginal reserves? Base: All Respondents n = 2022

Upon learning about the condition of the water on First Nation reserves, twice as many Canadians say they'd be more motivated to support an organization that helps to address these issues on aboriginal reserves in Canada than one that addresses the same issues when crises occur abroad.



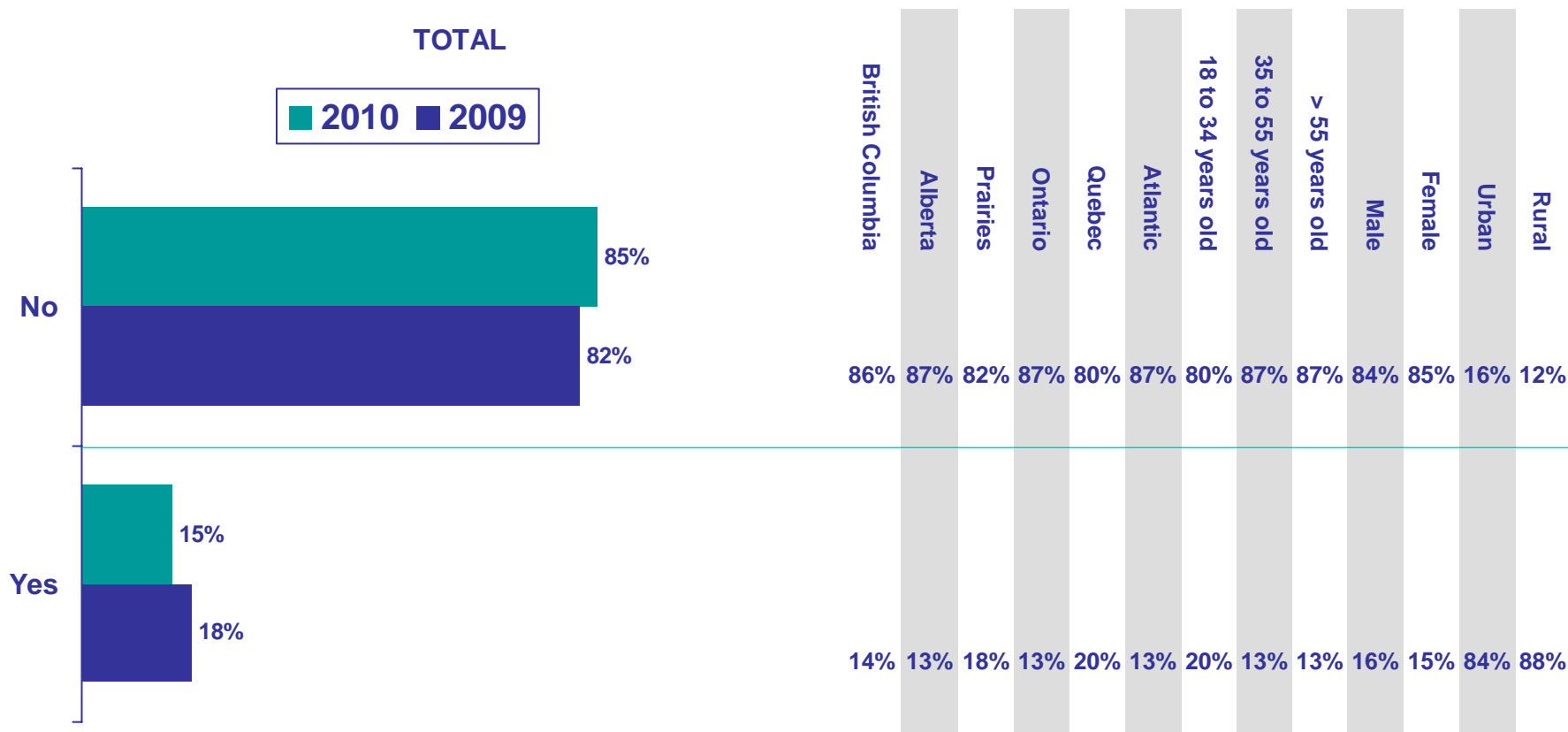
31. Now, based on this information, would you be more motivated to support an organization that helps to address the issue of safe drinking water on aboriginal reserves in Canada or an organization that addresses the issue of safe drinking water during humanitarian crises abroad, such as floods and earthquakes?
 Base: All Respondents n = 2022

One in ten Canadians have stopped doing business with a corporation because they learned that company used water irresponsibly, unchanged from last year.



34. Have you ever stopped doing business with a corporation because you learned that they used water in an irresponsible manner?
 Base: All Respondents n = 2022

Nearly two in ten say they've started doing business with a corporation that they learned used water responsibly, basically unchanged from last year.



35. And have you ever decided to do business with a corporation because you learned they used water in a responsible manner?
 Base: All Respondents n = 2022

Unilever/RBC Water Survey 2010

