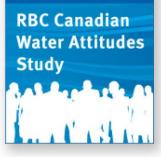


2017 RBC Canadian Water Attitudes Study: Webinar

2017



April 11, 2017 11:00 AM EST



Meet the Presenters

Introduction by:

Andrew Craig Director, Corporate Environmental Affairs RBC



Moderator:

Eric Whan Director GlobeScan



Special Guests and Water Experts:

Bob Sandford EPCOR Chair, Water & Climate Security United Nations University Institute for Water, Environment & Health



Robert Haller Executive Director

Canadian Water & Waste Water Association



Agenda

- Introduction and Methodology
- Canadian Water in Context
- Perceived Threats to Our Water
- Water Conservation Attitudes and Behaviour

G L O B E S C

- Infrastructure
- Recommendations
- Q&A

Methodology

Tenth Canadian Water Attitudes Study

- Annual public opinion survey of Canadians on water issues since 2008
- An online survey of Canadians between January 4th – 25th, 2017



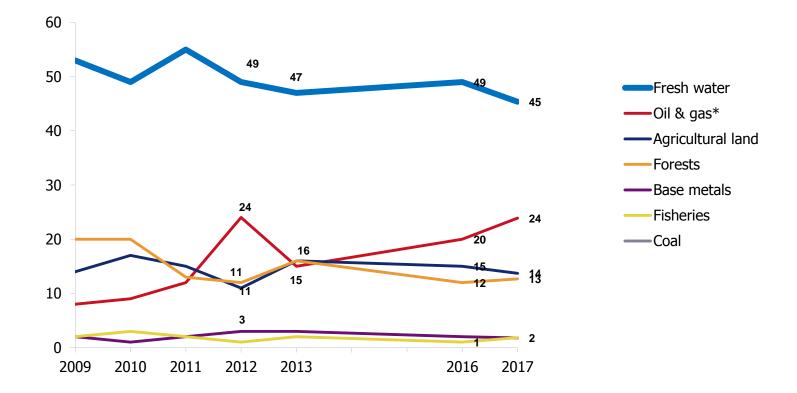


Canadian Water in Context



Canadians continue to say fresh water is Canada's most important natural resource

Canada's Most Important Natural Resource, 2009–2017



*Modified from "oil" in 2013 to "oil & gas" in 2016

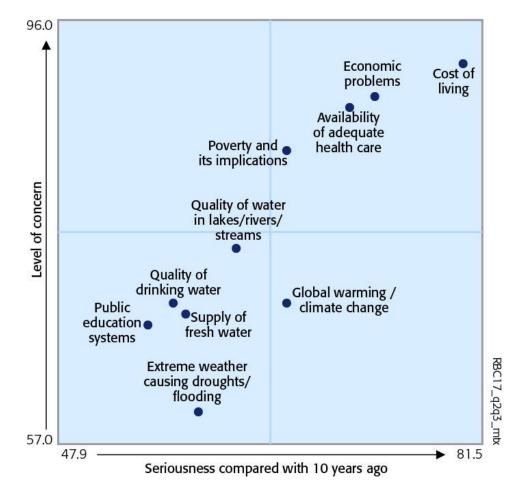
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Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194, 2013 *n*=2,282, 2012 *n*=2,428, 2011 *n*=2,066, 2010 *n*=2,022, 2009 *n*=2,165

Q4 Which of the following do you consider to be Canada's most important natural resource?

2 0 1 7 RBC Canadian Water Attitudes Study

Concern versus Seriousness of Issues in Past 10 Years



Top 2, All Respondents, 2009–2017

Base: All respondents 2017 n=2,017

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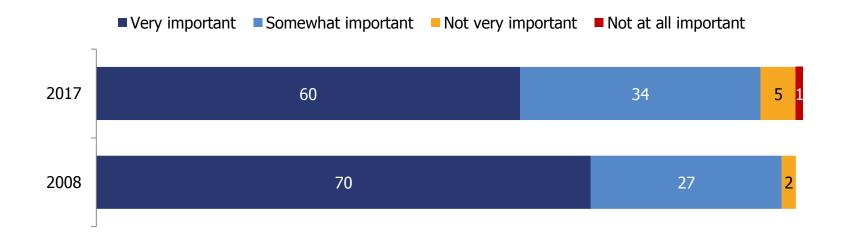
Q2 Below is a list of issues facing Canada that you might be concerned about. For each, please indicate the degree to which you are concerned or not concerned.

Q3 Compared with ten years ago, do you think each of these issues has become...

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Fewer Canadians say an abundant fresh water supply is "very important" to Canada's national economy than in 2008

Importance of Abundant Canadian Fresh Water Supply to Canada's National Economy, 2008–2017



2 0 1 7 RBC Canadian Water Attitudes Study

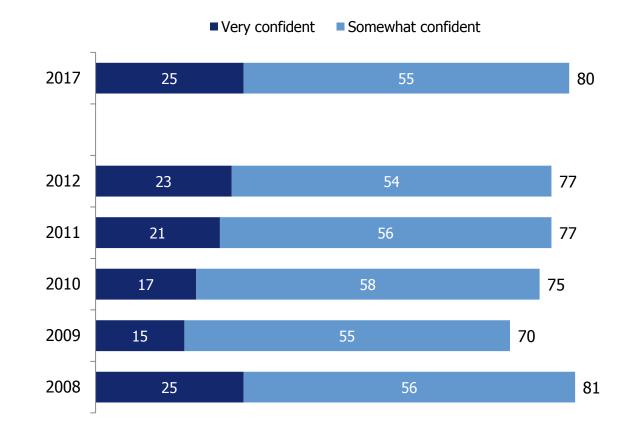
Base: All respondents 2017 *n*=2,017, 2008 *n*=2,309

Q7 How important do you think an abundant Canadian fresh water supply is to Canada's national economy?

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Canadians' confidence in having enough fresh water to meet longterm needs is nearly the same as in 2008

"Very Confident" or "Somewhat Confident," 2008–2017



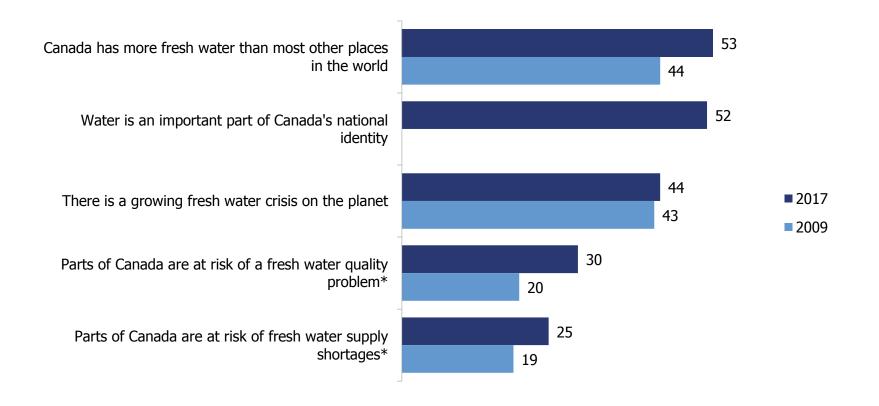
Base: All respondents 2017 *n*=2,017, 2012 *n*=2,428, 2011 *n*=2,066, 2010 *n*=2,022, 2009 *n*=2,165, 2008 *n*=2,309

9

Q8 How confident are you that Canada as a whole has enough fresh water to meet our long-term needs? Please select only one. 2 0 1 7 RBC Canadian Water Attitudes Study

Water is an important part of Canada's national identity; Canadians feel that water quality and supply could be at risk

"Strongly Agree," 2009–2017



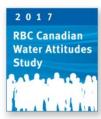
2 0 1 7 RBC Canadian Water Attitudes Study

*Modified in 2017

Base: All respondents 2017 *n*=2,017, 2009 *n*=2,165

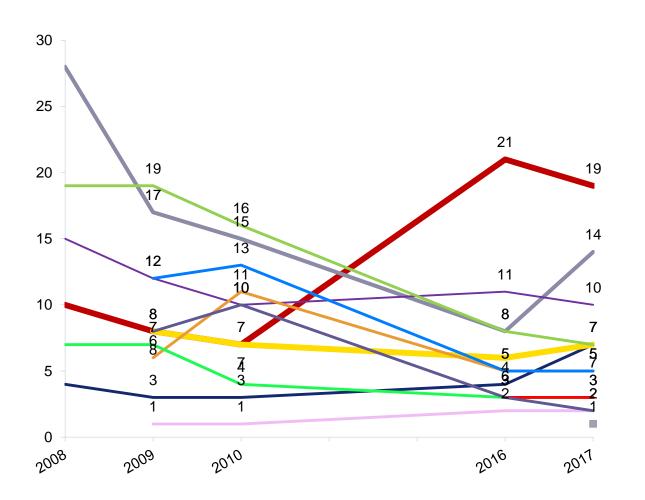
Q11 Do you agree or disagree with the following statements?

Perceived Threats to Our Water



Nearly twice as many Canadians view climate change as the biggest threat to Canada's fresh water supply than in 2008

Greatest Threat to Fresh Water Supply, Rank 1, 2008–2017





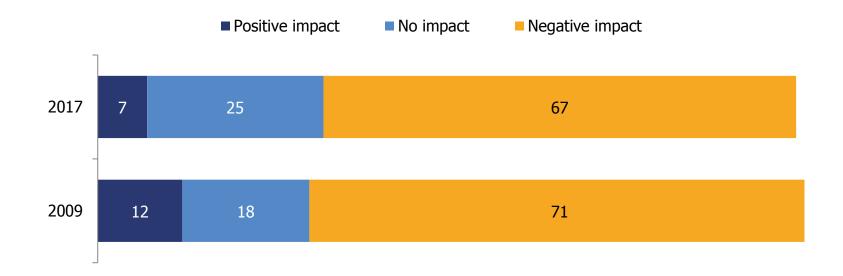
- Lack of knowledge about Canada's fresh water
- ----Harmful algal blooms in lakes

2 0 1 7 RBC Canadian Water Attitudes Study

12 Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194, 2010 *n*=2,022, 2009 *n*=2,165, 2008 *n*=2309 Q12 (Modified in 2016) What do you think are the biggest threats to Canada's fresh water supply?

Yet a quarter believe that climate change will have "no impact" on Canada's supply and quality of fresh water

Impact of Climate Change on Canada's Supply and Quality of Fresh Water, 2009–2017



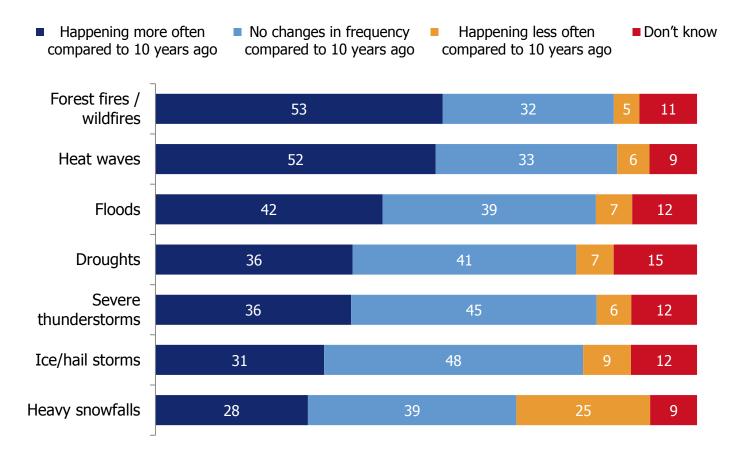
Base: All respondents 2017 n=2,017, 2009 n=2,165

13 Q13 What impact, if any, do you believe climate change will have on Canada's supply and quality of fresh water?

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Half of Canadians feel forest fires and heat waves are happening more often compared to 10 years ago

Perceived Change in Frequency of Weather Events Compared to Ten Years Ago, 2017

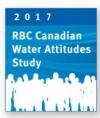


2 0 1 7 RBC Canadian Water Attitudes Study

Base: All respondents 2017 n=2,017

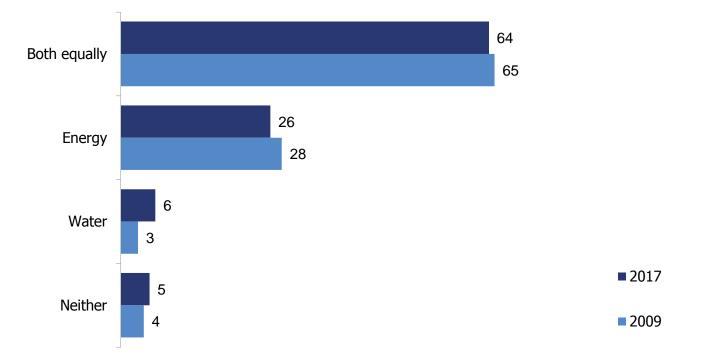
14 Q16 Compared to 10 years ago, do you feel that the following events have been happening any more or less often in Canada?

Water Conservation Attitudes and Behaviour



A majority of Canadians say they put effort into reducing both energy and water consumption equally

Focus of Efforts on Energy vs Water Conservation, 2009–2017



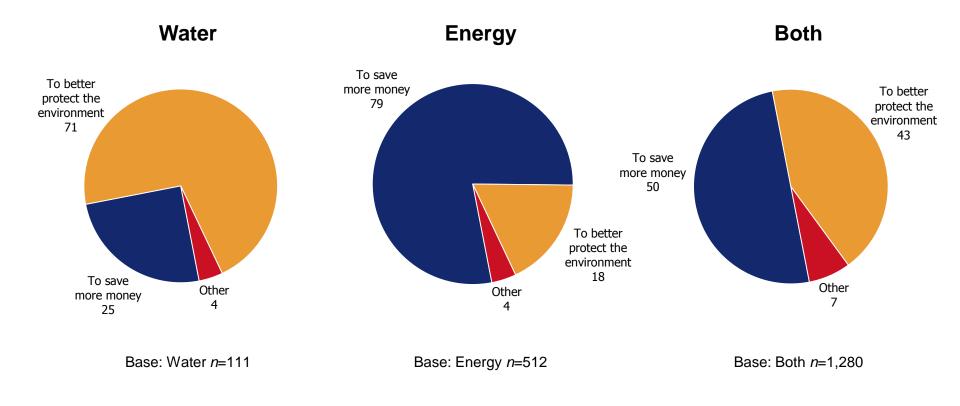
2 0 1 7 RBC Canadian Water Attitudes Study

Base: All respondents 2017 n=2,017, 2009 n=2,165

16 Q29 Do you consciously put more effort into reducing your energy consumption (electricity) or your water consumption? *Please select only one*.

Those who put more effort into conserving water do so to protect the environment, while energy conservation is about saving money

Reasons for Saving Energy, Water or Both, 2017

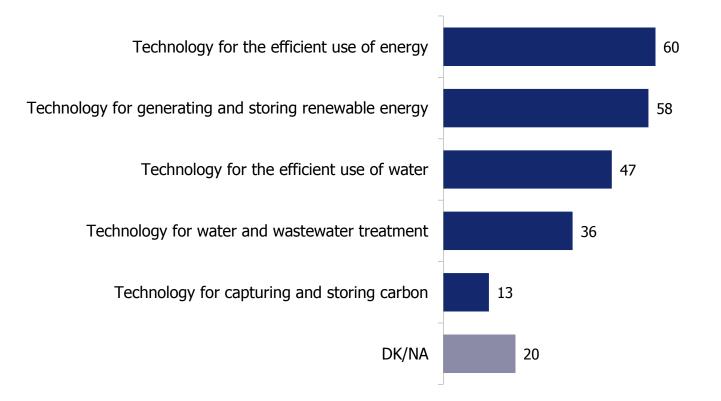


2 0 1 7 RBC Canadian Water Attitudes Study

17 Q30 Why do you say you put more effort into conserving [water/energy]? / Why do you say you put effort into conserving both energy and water equally? *Please select your main reason.*

More Canadians say that investing in technology related to energy is important than technology for efficient water use and treatment

Most Important Investment Opportunities, Total Mentions, 2017



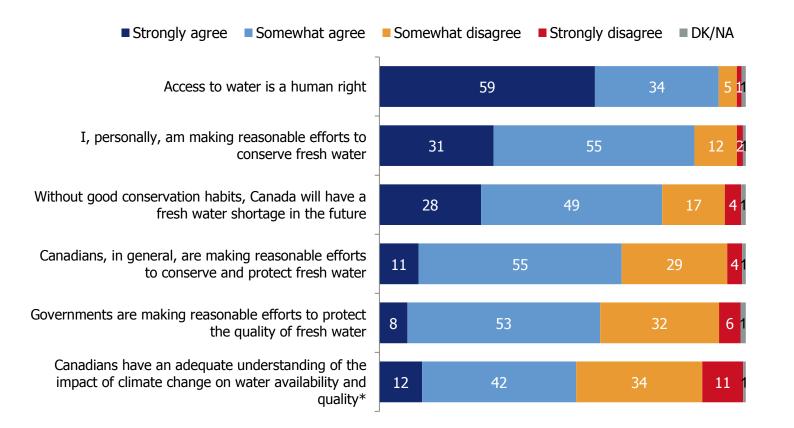
Base: All respondents 2017, *n*=2,017

18 Q6 Investing in technology is a priority for Canadian governments and businesses. Please rank up to three types of technology...in terms of how important you think it is for Canada to invest in.

2 0 1 7 RBC Canadian Water Attitudes Study

Canadians personally feel they are making reasonable efforts to conserve fresh water

Statements on Attitudes about Water Conservation, 2017



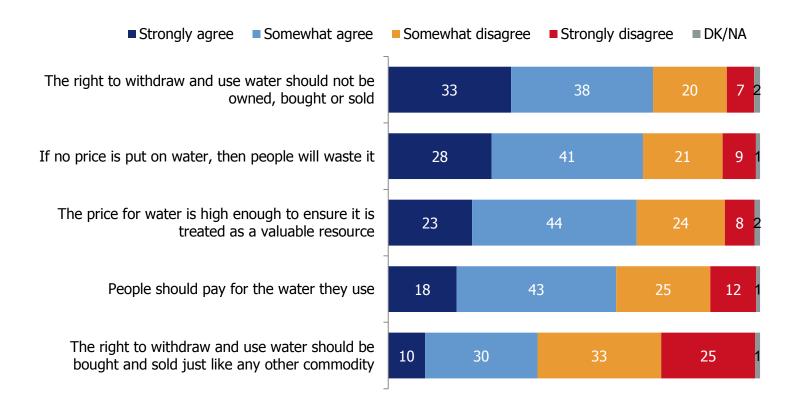
2 0 1 7 RBC Canadian Water Attitudes Study

Base: All respondents 2017 n=2,017

19 Q26 To what extent do you agree or disagree with each of the following statements?

Most Canadians don't see water as a commodity that should be sold; Nearly seven in ten think they pay enough

Statements on Attitudes about Water Conservation, 2017



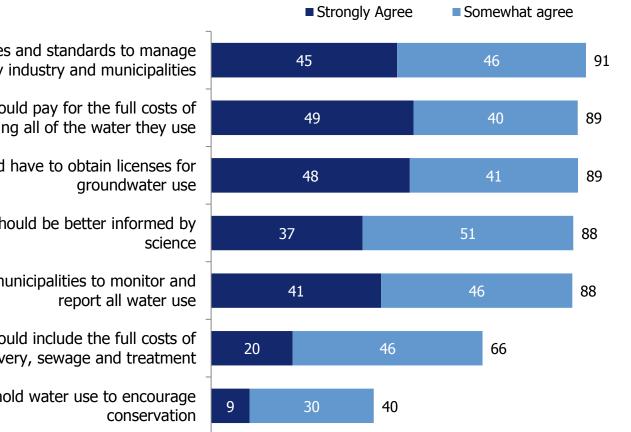
2 0 1 7 RBC Canadian Water Attitudes Study

Base: All respondents 2017 n=2,017

²⁰ Q26 To what extent do you agree or disagree with each of the following statements?

Canadians agree that commercial enterprises should pay the full cost of water, but are less likely to agree to higher charges at the household level

"Strongly Agree" or "Somewhat Agree," 2017



We should develop stricter rules and standards to manage water use by industry and municipalities

Commercial enterprises should pay for the full costs of delivering and treating all of the water they use

Commercial enterprises should have to obtain licenses for

Water management decisions should be better informed by

We should require industry and municipalities to monitor and

Water costs for consumers should include the full costs of water delivery, sewage and treatment

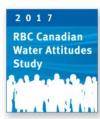
We should charge more for household water use to encourage

2017 **RBC Canadian Water Attitudes** Study

Base: All respondents 2017 n=2,017

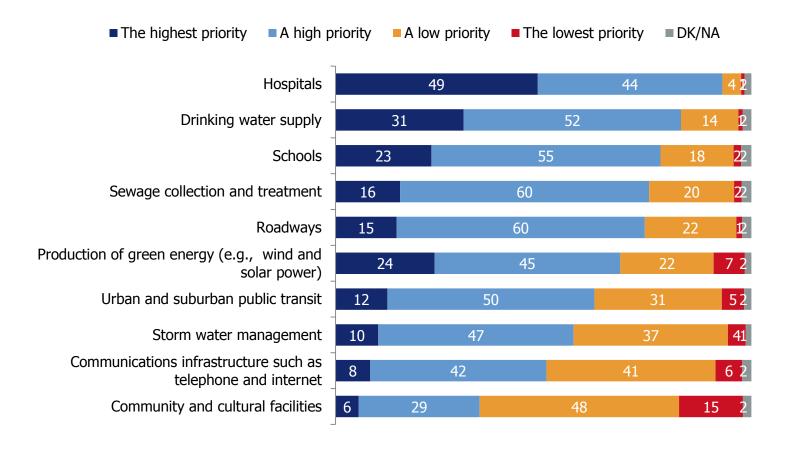
Q27 The following are ideas for how Canada could protect and manage fresh water better. Please indicate 21 whether you agree or disagree with each of the following ideas:

Infrastructure



Canadians say that the infrastructure for drinking water supply is one of the highest priorities for funding

Priority Infrastructure Areas for Government Funding, 2017



Base, All respondents 2017 n=2,017

Q5 All levels of government in Canada need to make decisions about how best to use our tax dollars. To what

extent, if at all, do you think each of the following infrastructure areas should be a priority for government funding in Canada?

2017 RBC Canadian Water Attitudes Study

Canadians perceive that water issues and infrastructure needs are going to become more urgent in ten years time

Urgency of Issues for Canadian Communities in Ten Years, 2017

Much more Som urgent more		5	Somewhat ess urgent	Much less urgent	■DK/	NA
Protecting drinking water sources 36			38		23	11
Deteriorating sewage infrastructure	29		40		27	2 <mark>1</mark> 1
Deteriorating water distribution infrastructure	26		42		26	<mark>31</mark> 2
Increasing consumption of water supplies	27 41		41		28	2 <mark>1</mark> 1
Managing wastewater treatment costs	21 43		43	31		2 <mark>1</mark> 1
Managing water purification treatment costs	21	43			32	
Declining groundwater levels	23	38		32		<mark>31</mark> 2
Loss of treated water through leaking infrastructure	21	40		33		4 <mark>1</mark> 2
Government regulation related to water infrastructure	20	40		34		3 <mark>1</mark> 1
Emergency preparedness (for floods, extreme weather, etc.)	22	22 38		35		<mark>31</mark> 2
Condition of storm water management systems	18	42		35	35	
Vulnerability of the built environment to water damage	17	39		37		4 <mark>1</mark> 2
Loss of water-permeable surfaces to pavement	16	34		43		4 <mark>1</mark> 1
Urban/city flooding	14	35		43		4 <mark>1</mark> 2

Base: All respondents 2017 n=2,017

24

Q17 Ten years from now, do you think that each of the following issues will have become less urgent or more urgent for urban communities and municipalities in Canada?



- 1. Better communicate the value of water to our economy
- 2. Focus on implementing the solutions in front of us
- 3. Show global leadership

Q & A

Andrew Craig Director, Corporate Environmental Affairs RBC



Eric Whan Director GlobeScan



Bob Sandford EPCOR Chair, Water & Climate Security United Nations University Institute for Water, Environment & Health



Robert Haller Executive Director Canadian Water & Waste Water Association



We will send you an email following this webinar that will direct you to a link to download these webinar slides, as well as the detailed report.

Thank you for participating in the webinar.





evidence and ideas. applied