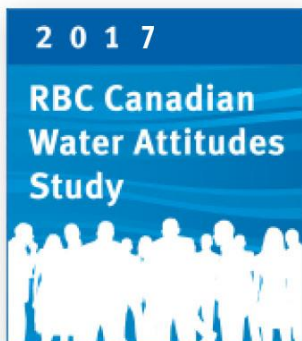




2017  
RBC Canadian  
Water Attitudes Study:  
Webinar

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**
- **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 4<sup>th</sup> – 25<sup>th</sup>, 2017

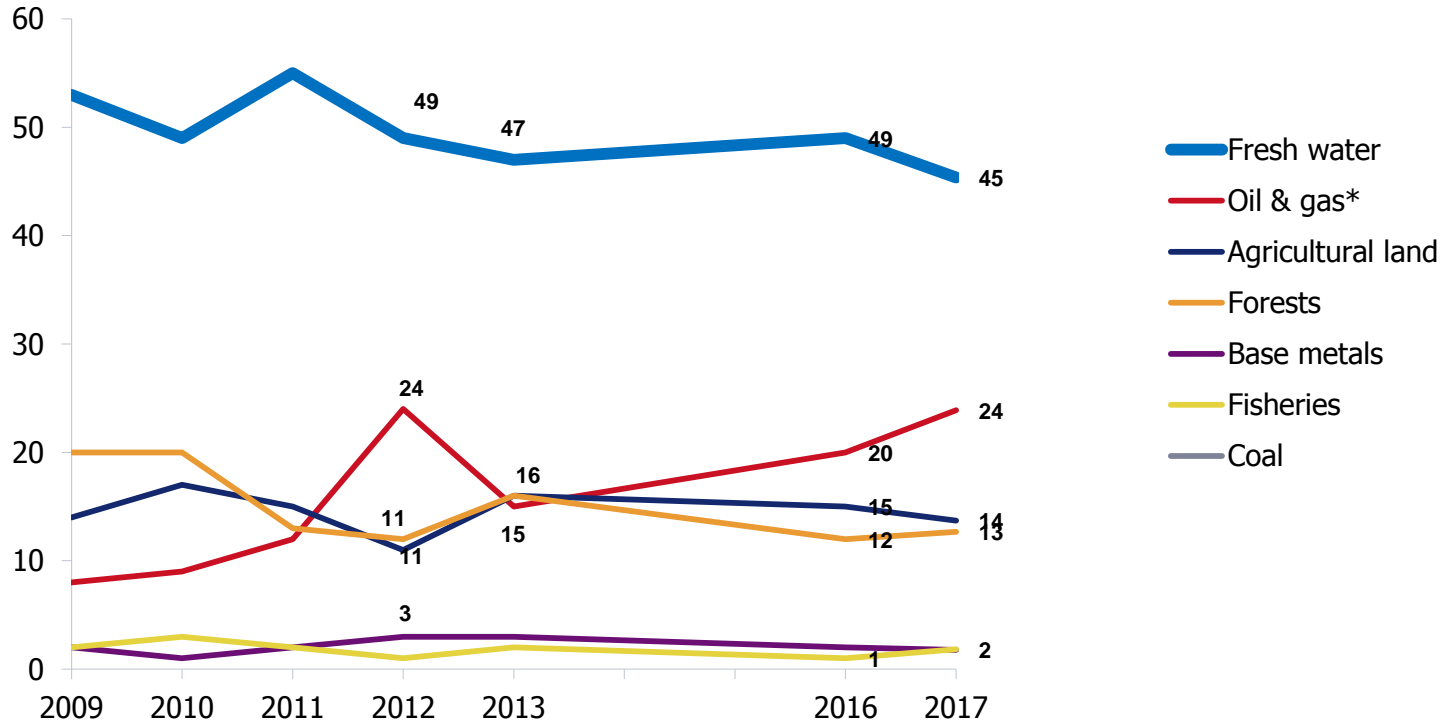




## Canadian Water in Context

# 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

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  $n=2,165$

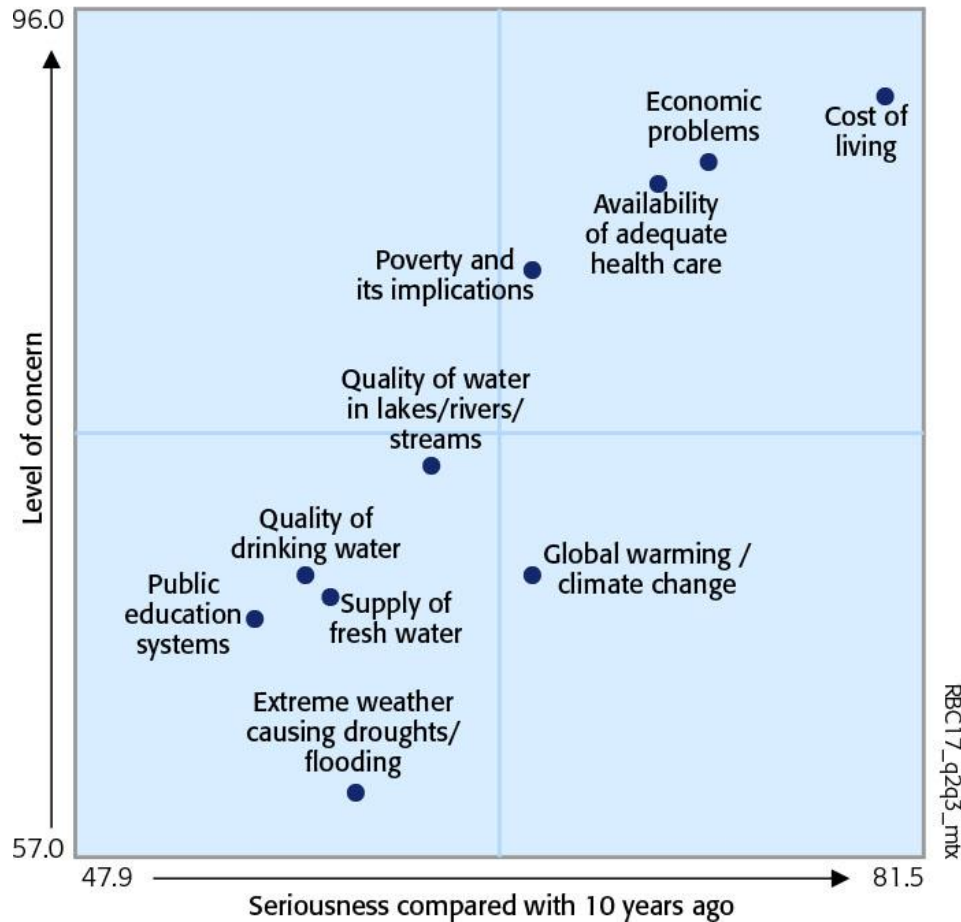
Q4 Which of the following do you consider to be Canada's most important natural resource?

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# Concern versus Seriousness of Issues in Past 10 Years

## Top 2, All Respondents, 2009–2017



RBC17\_q2q3\_mlx

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

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.

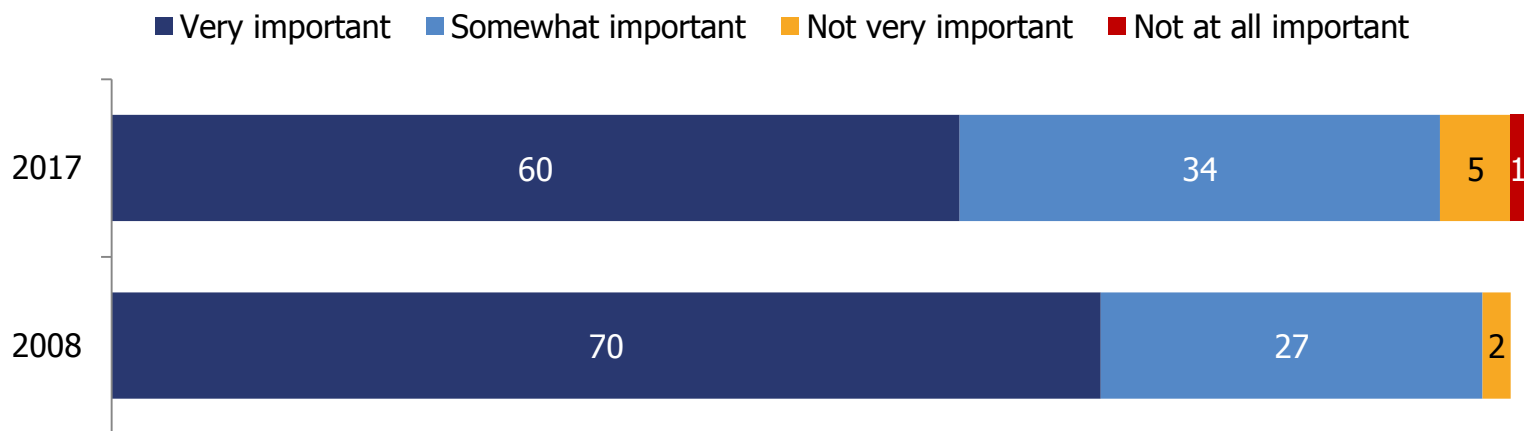
Q3 Compared with ten years ago, do you think each of these issues has become...

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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



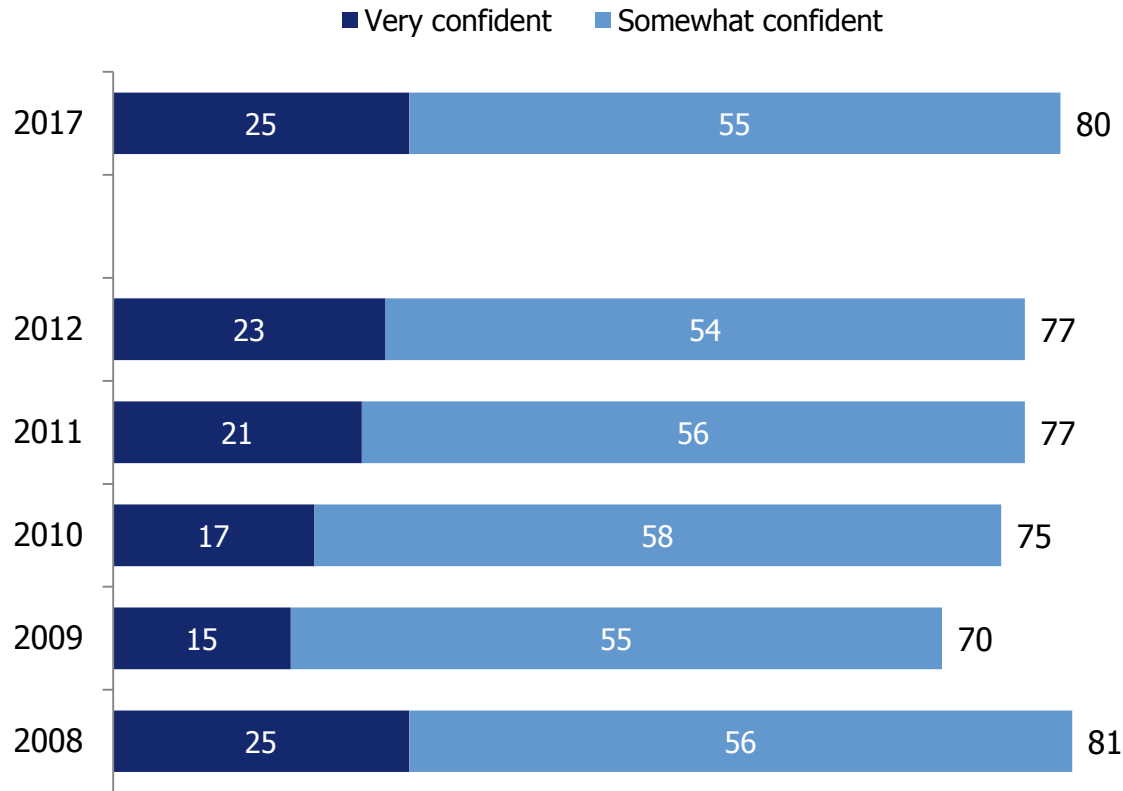
Base: All respondents 2017  $n=2,017$ , 2008  $n=2,309$

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



# Canadians' confidence in having enough fresh water to meet long-term needs is nearly the same as in 2008

## “Very Confident” or “Somewhat Confident,” 2008–2017

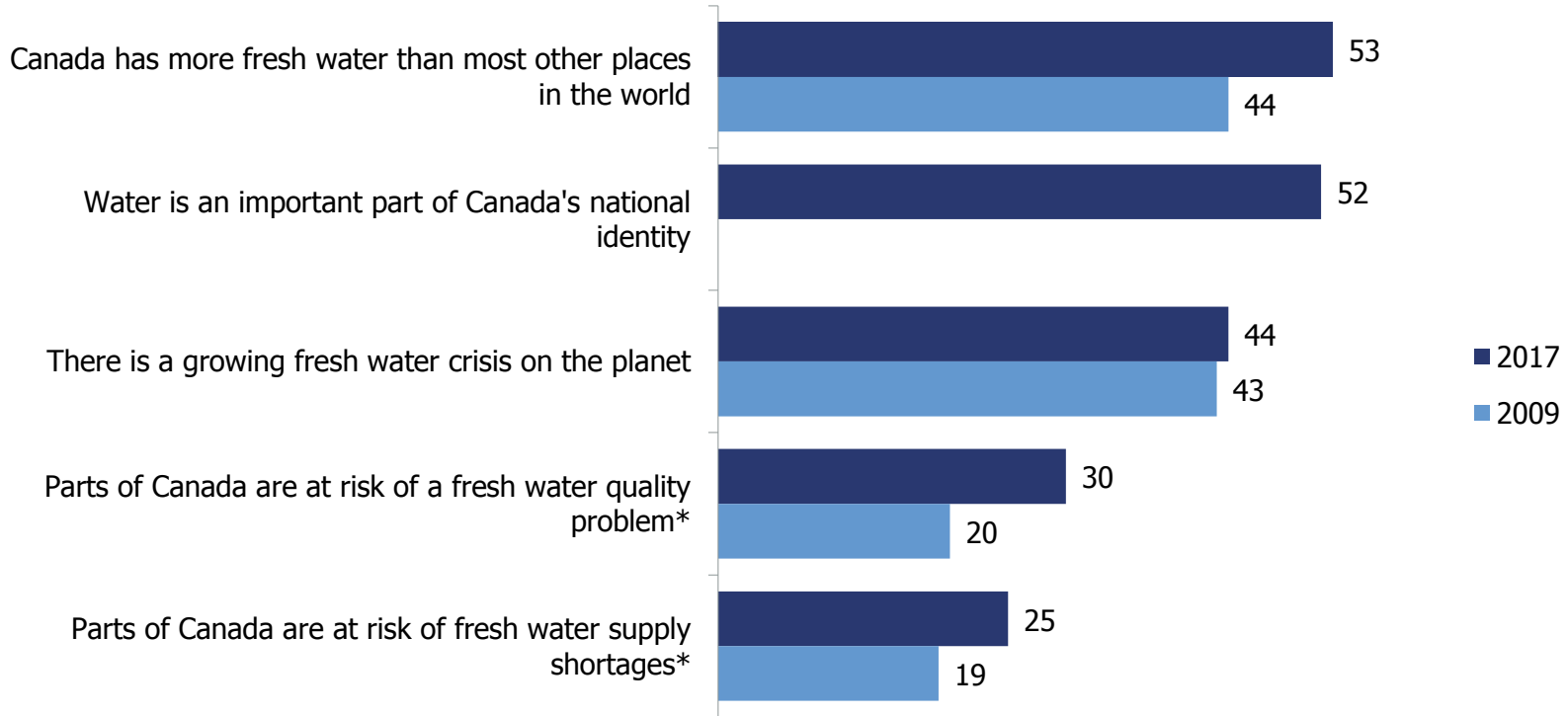


Base: All respondents 2017  $n=2,017$ , 2012  $n=2,428$ , 2011  $n=2,066$ , 2010  $n=2,022$ , 2009  $n=2,165$ , 2008  $n=2,309$

g Q8 How confident are you that Canada as a whole has enough fresh water to meet our long-term needs?  
*Please select only one.*

# 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



\*Modified in 2017

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

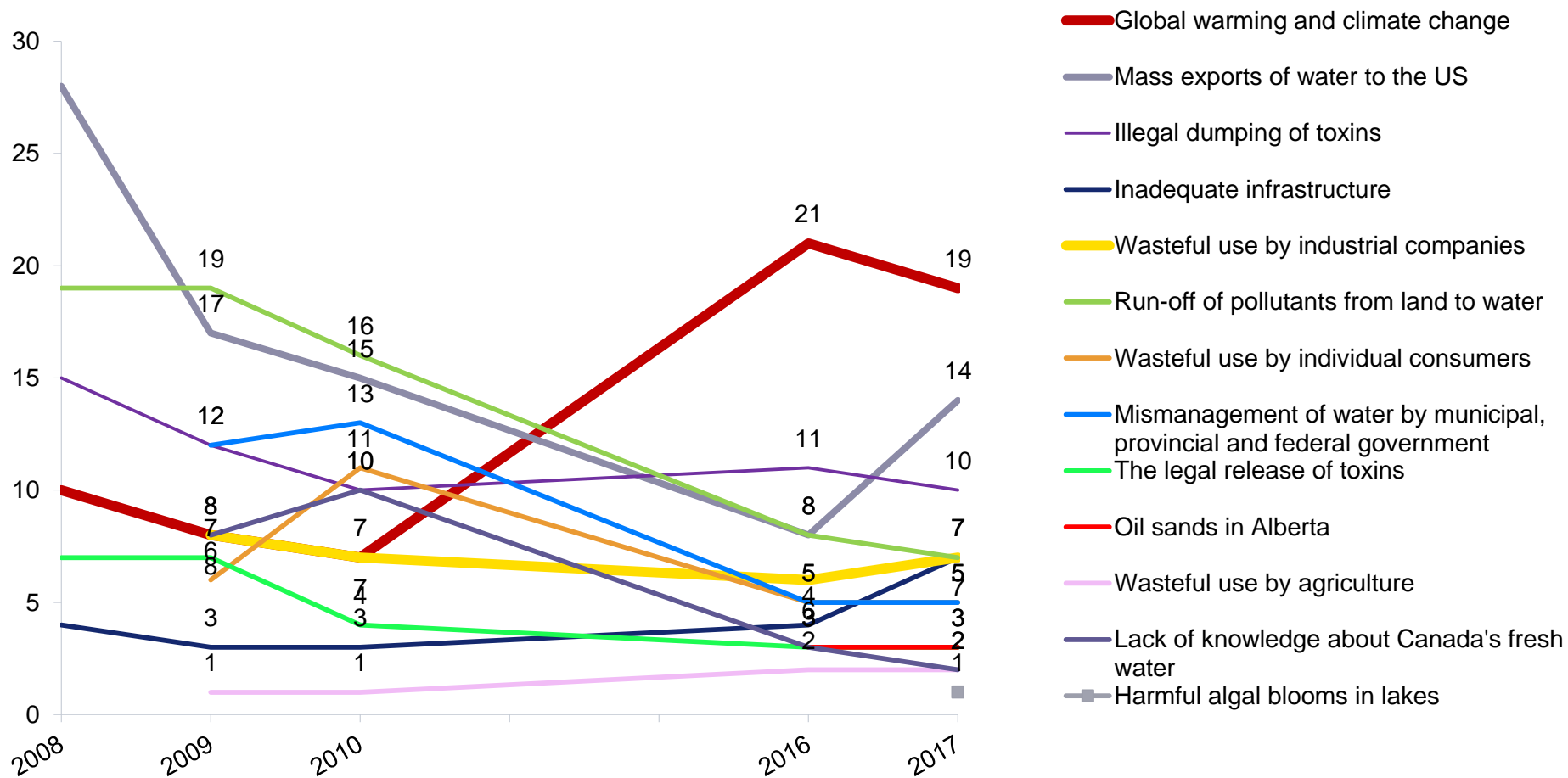
Q11 Do you agree or disagree with the following statements?



## 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

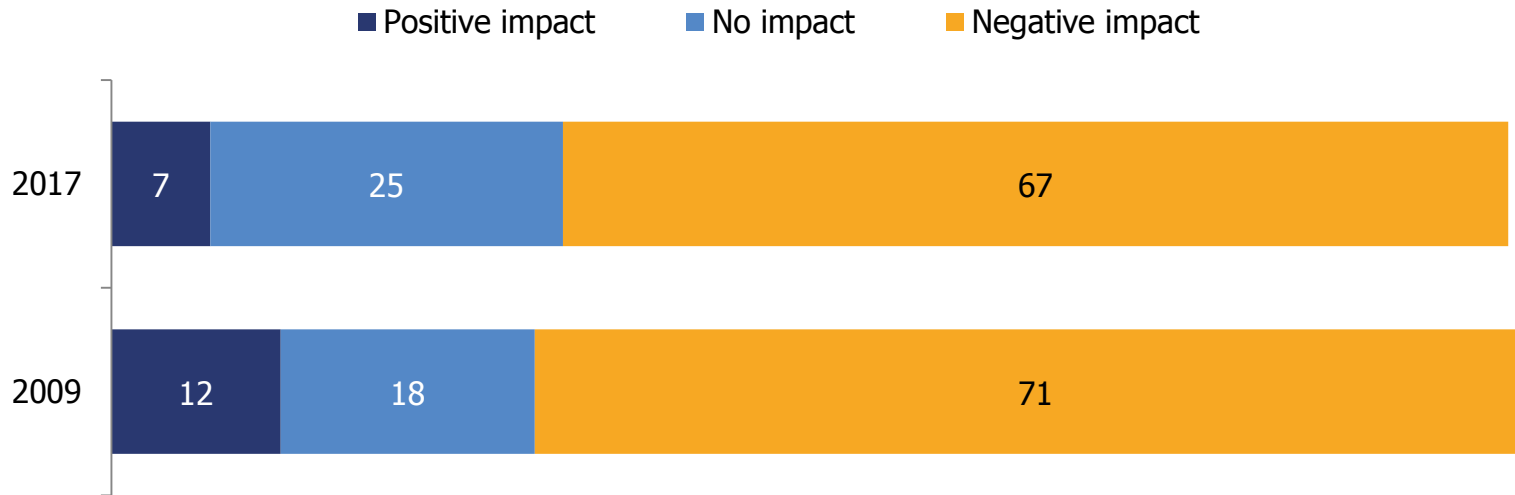


Base: All respondents 2017 n=2,017, 2016 n=2,194, 2010 n=2,022, 2009 n=2,165, 2008 n=2309

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

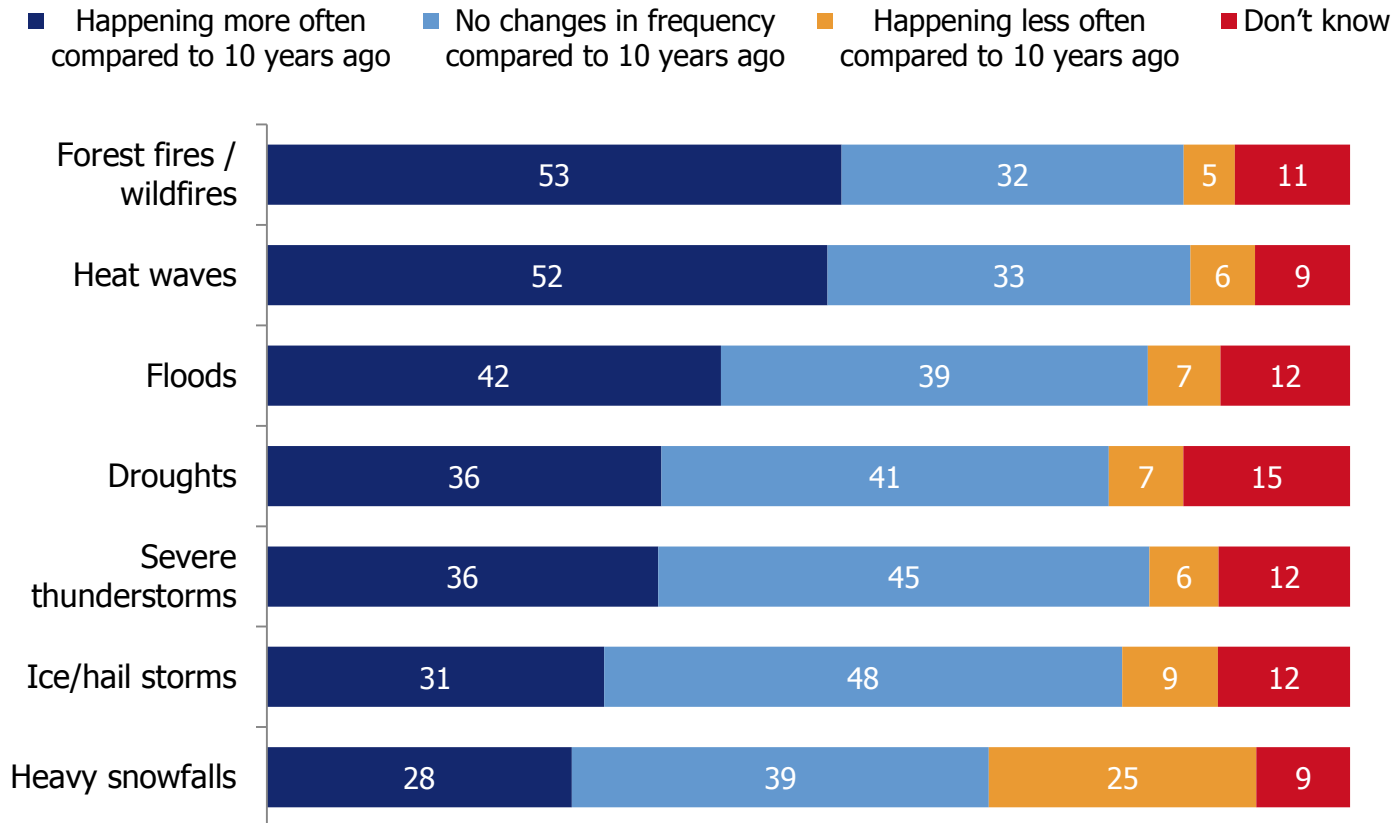
## Impact of Climate Change on Canada’s Supply and Quality of Fresh Water, 2009–2017



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

# 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



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

2017

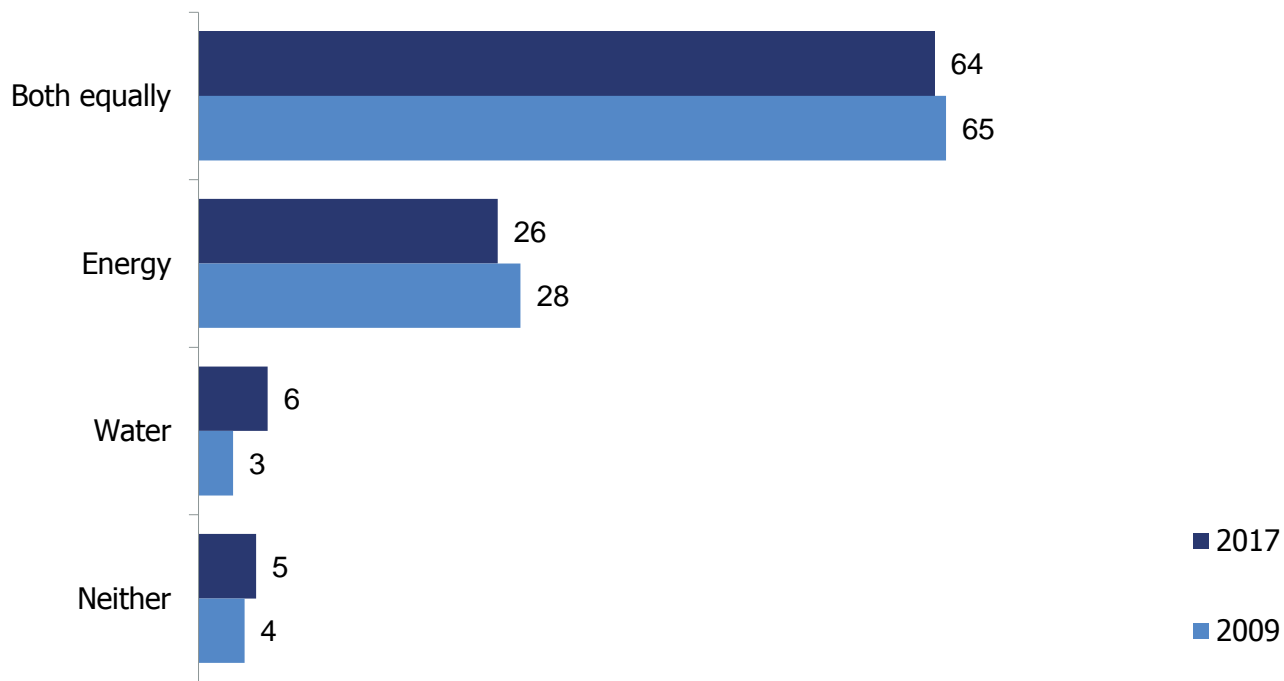
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## **Water Conservation Attitudes and Behaviour**

# 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



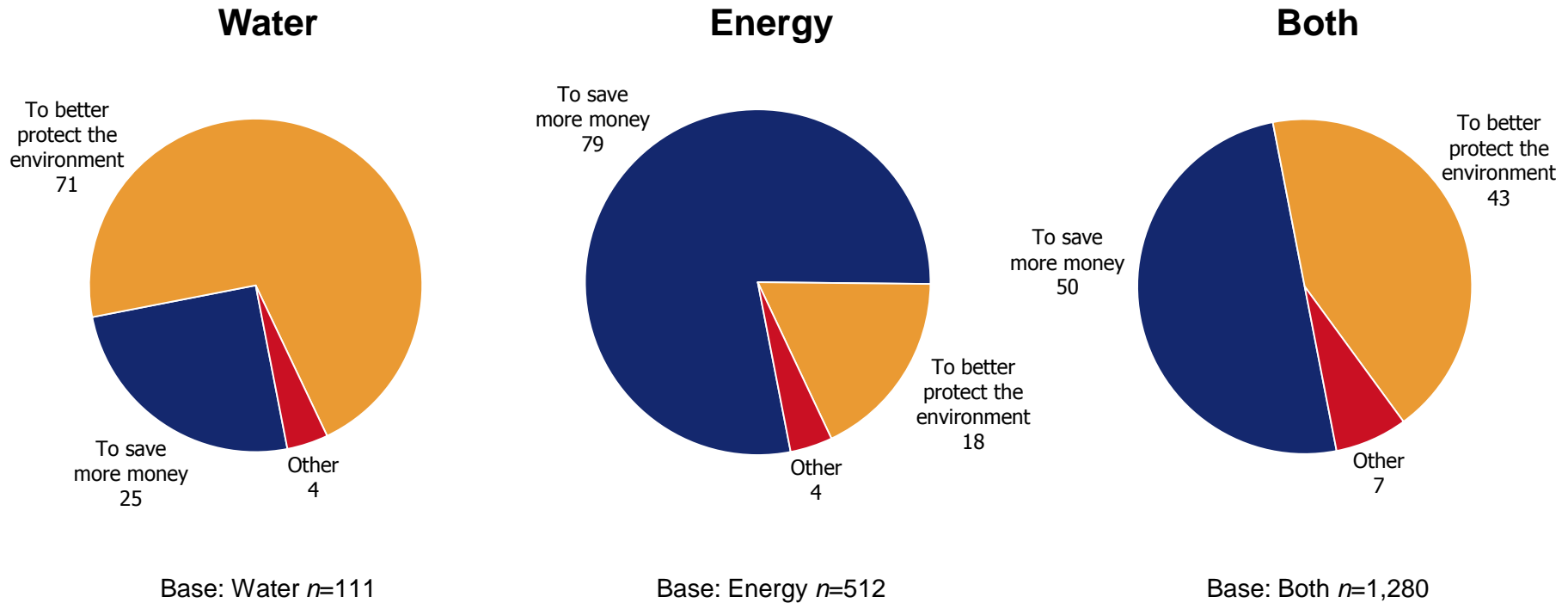
Base: All respondents 2017  $n=2,017$ , 2009  $n=2,165$

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

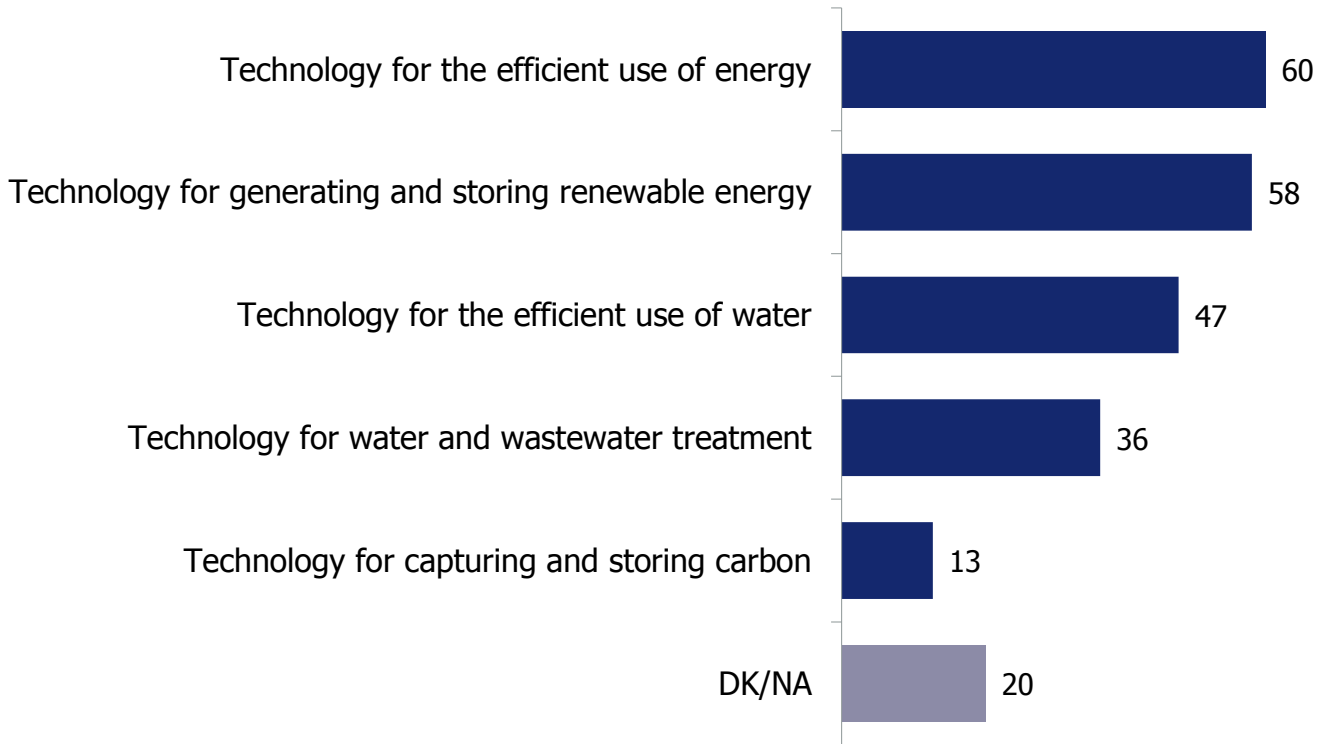


2017

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# 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



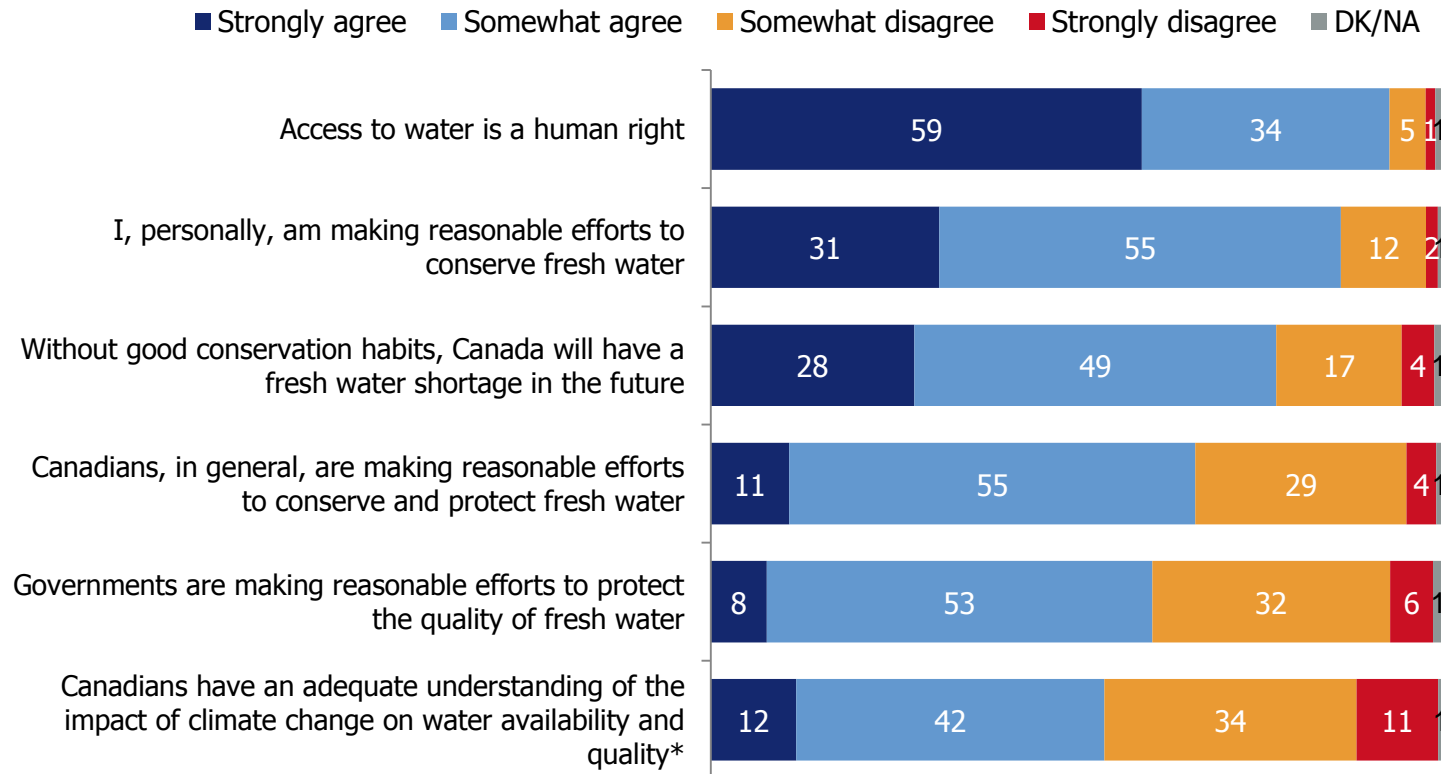
Base: All respondents 2017,  $n=2,017$

2017

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

## Statements on Attitudes about Water Conservation, 2017



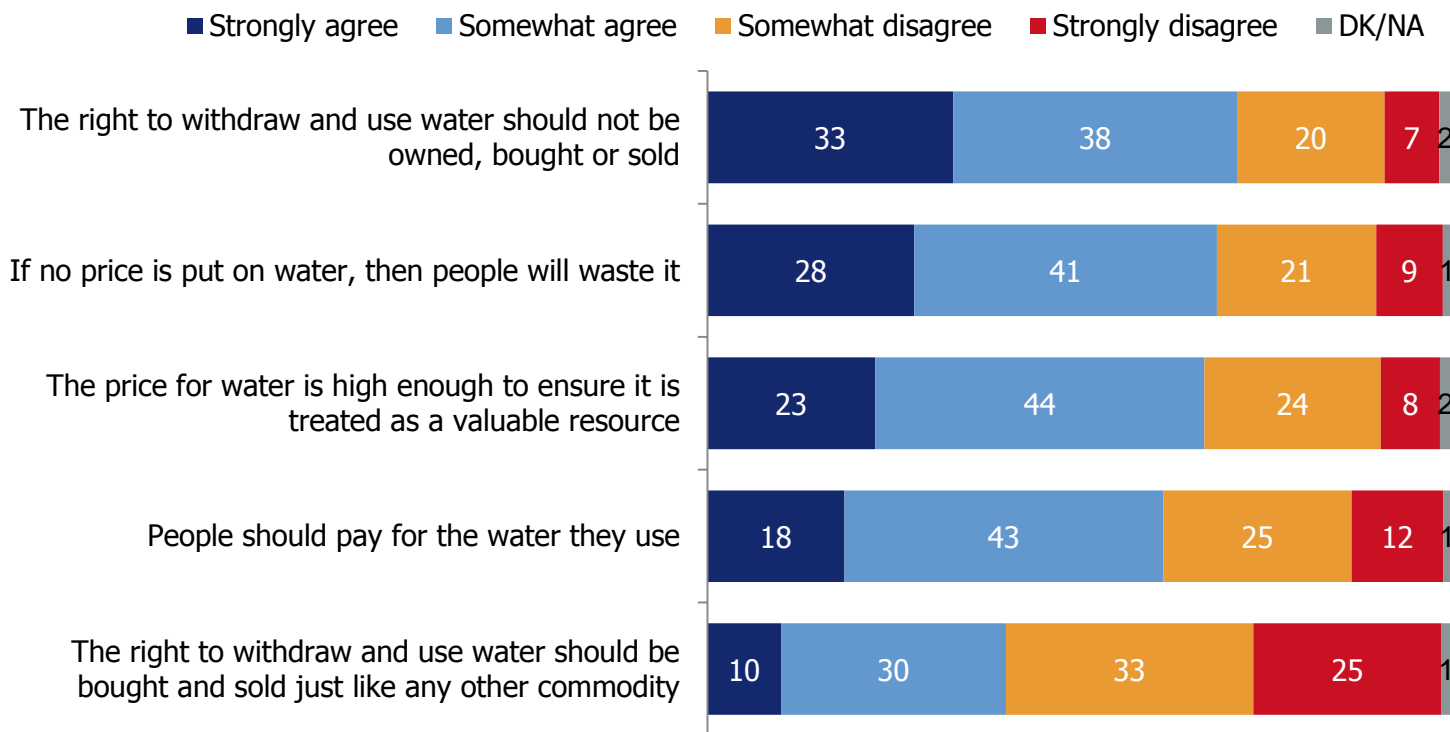
Base: All respondents 2017 *n*=2,017

2017

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Study

# 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

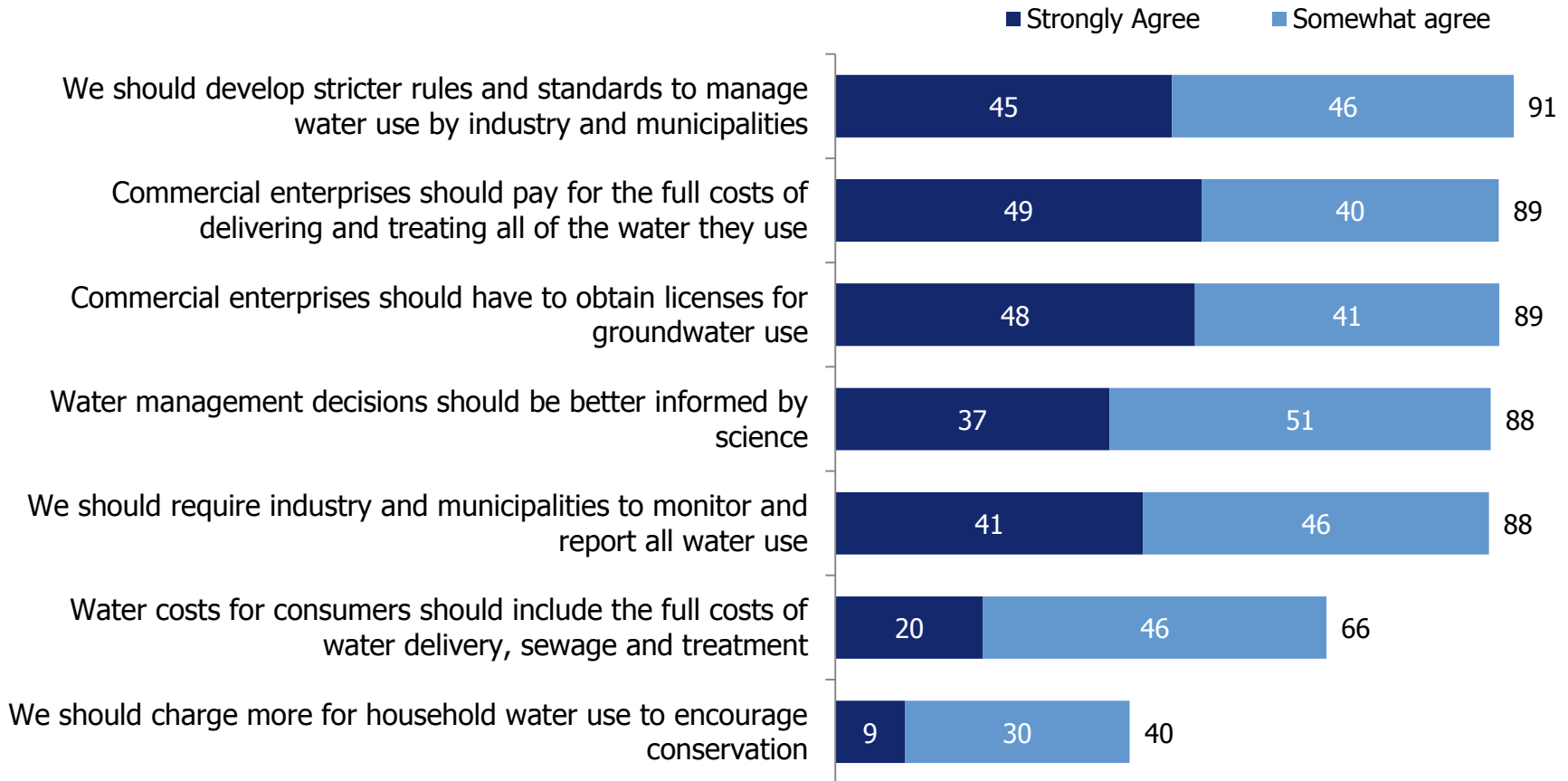


Base: All respondents 2017 *n*=2,017

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



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

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

2017

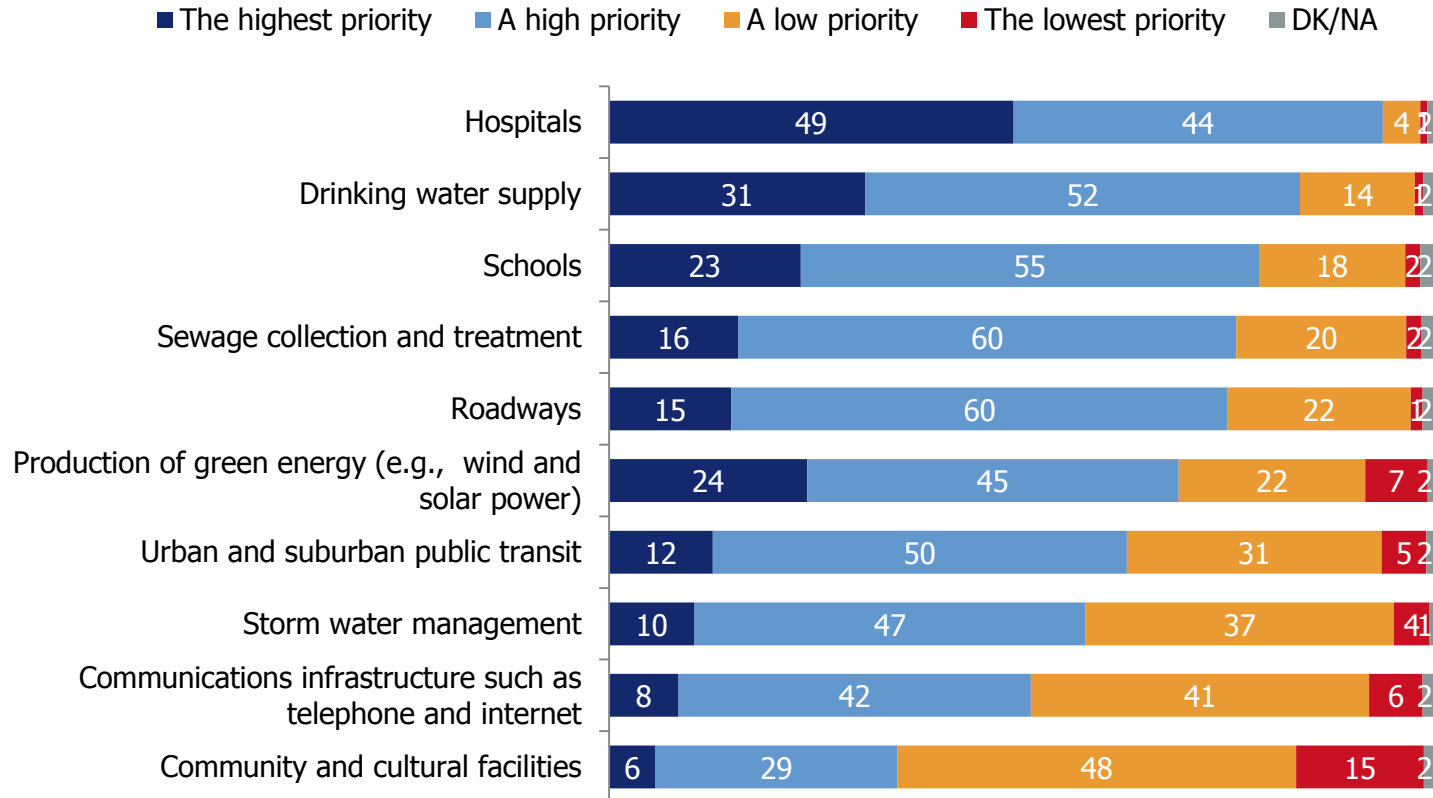
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Study



## 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

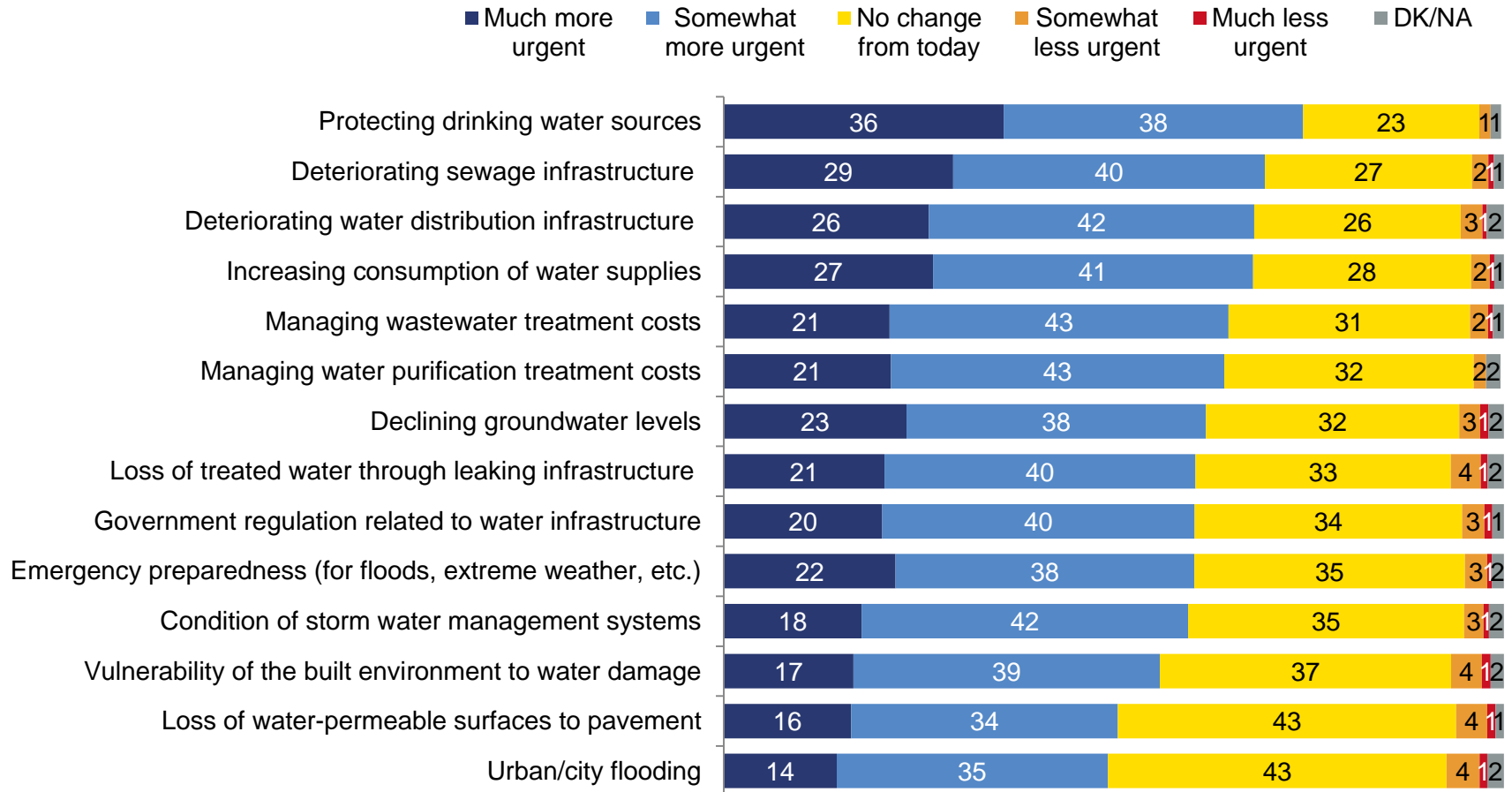


Base, All respondents 2017 *n*=2,017

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?

# 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



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

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?



# Recommendations

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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**  
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**Thank you for participating in the webinar.**

