



2009 Canadian Water Attitudes Study

The 2009 Canadian Water Attitudes 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 “2009 Canadian Water Attitudes Study, commissioned by RBC and Unilever Canada.”

March, 2009

About The Canadian Water Attitudes Study



The 2009 Canadian Water Attitudes Study was commissioned by Unilever Canada and RBC, and administered by Ipsos Reid from February 5 to 12, 2009. It included a sample of 2,165 adult Canadians from the general population across Canada. The results are considered accurate to within ± 2.2 per cent 19 times out of 20, of what the results would have been had the entire adult population in Canada been polled. The data were weighted by region, age and sex according to 2006 Census data.

Unilever

- Unilever, one of the world's largest consumer products companies, adds vitality to life by meeting everyday needs for nutrition, hygiene and personal care. Every day, 150 million people choose Unilever brands to feed their families, and to clean themselves and their homes. With a steadfast commitment to water sustainability, Unilever strives to lead by example and remains committed to further reducing its water footprint. For ten years running, Unilever has been acknowledged as the food industry category leader on the Dow Jones Sustainability Index for their environmental policies. For the fourth 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 'footprint' in five key areas - transportation, food, waste, water and packaging. 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.

RBC

- Canada's largest bank as measured by assets and market capitalization, RBC is also 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 more than 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 52 other countries. RBC is listed on the 2008-2009 Dow Jones Sustainability Index, recognizing the world's financial, social and environmental corporate leaders, as well as the Jantzi Social Index and the FTSE4Good Index. The company was recently named to the "Global 100: Most Sustainable Corporations in the World" 2009 list. RBC was also among 67 companies and one of only 18 financial institutions worldwide named to the Carbon Disclosure Leadership Index 2008, a prestigious honour roll of world leaders at understanding and managing the financial risks and opportunities resulting from climate change. In 2007, RBC launched the RBC Blue Water Project, a 10-year, \$50 million philanthropic commitment to supporting organizations that protect watersheds and ensure access to clean drinking water. For more information, visit www.rbc.com/bluewater.

Executive Summary



Water as an Important Environmental Concern

- There is still a ways to go to raise the profile of water as a top environmental issue in the minds of Canadians. When prompted, Canadians are concerned about the quality and quantity of Canada's freshwater supply, yet when judged against other environmental concerns, water quality/pollution comes in third behind climate change and air pollution. Generally speaking, Canadians are more likely to be concerned with the quality of water than the supply of water.

Quality of Water

- While most Canadians remain at least somewhat confident in the safety of Canada's fresh water supply, both in general and in their homes, Canadians are less confident about the quality and safety of Canada's water supply compared to a year ago. The majority drinks their municipality's tap water, however half of these filter their tap water before drinking. Most have not noticed any changes to the quality of their water supply, but among those that have, they are more likely to report negative changes in the quality.

Supply of Water

- Canadians are becoming less confident in the supply of Canada's freshwater supply. Nearly all Canadians agree that Canada has one of the largest supplies of freshwater, and understand that parts of the world are facing a water crisis. Most believe that without good conservation habits, Canada could be at risk of a water shortage as well.
- Canadians are divided on what the largest threat is to our water supply and underestimate that impact that personal or household use has on our supply. Most Canadians believe that they use less water than the average Canadian, and upon hearing the actual average personal consumption level, concern increases. While individuals think they do reasonably well conserving water, they do not think the same about everybody else.

Executive Summary



Water Conservation Habits

- There has been no increase in reported conservation habits over the past year, despite an increased belief in the importance of doing so. While Canadians think that it is important to do a wide range of things around the home in order to conserve water, their reported incidence of following through on these things is much lower.
- Slightly more Canadians know than don't know the amount that they pay for water in their home. But more know the amount of money they pay each month for electricity than water. In this vein, while the majority says that they put an equal amount of effort into conserving water as they do energy, among those who don't, more Canadians say that make a greater effort to conserve electricity than water. A plurality believes that more education would be the key to helping them conserve more water.

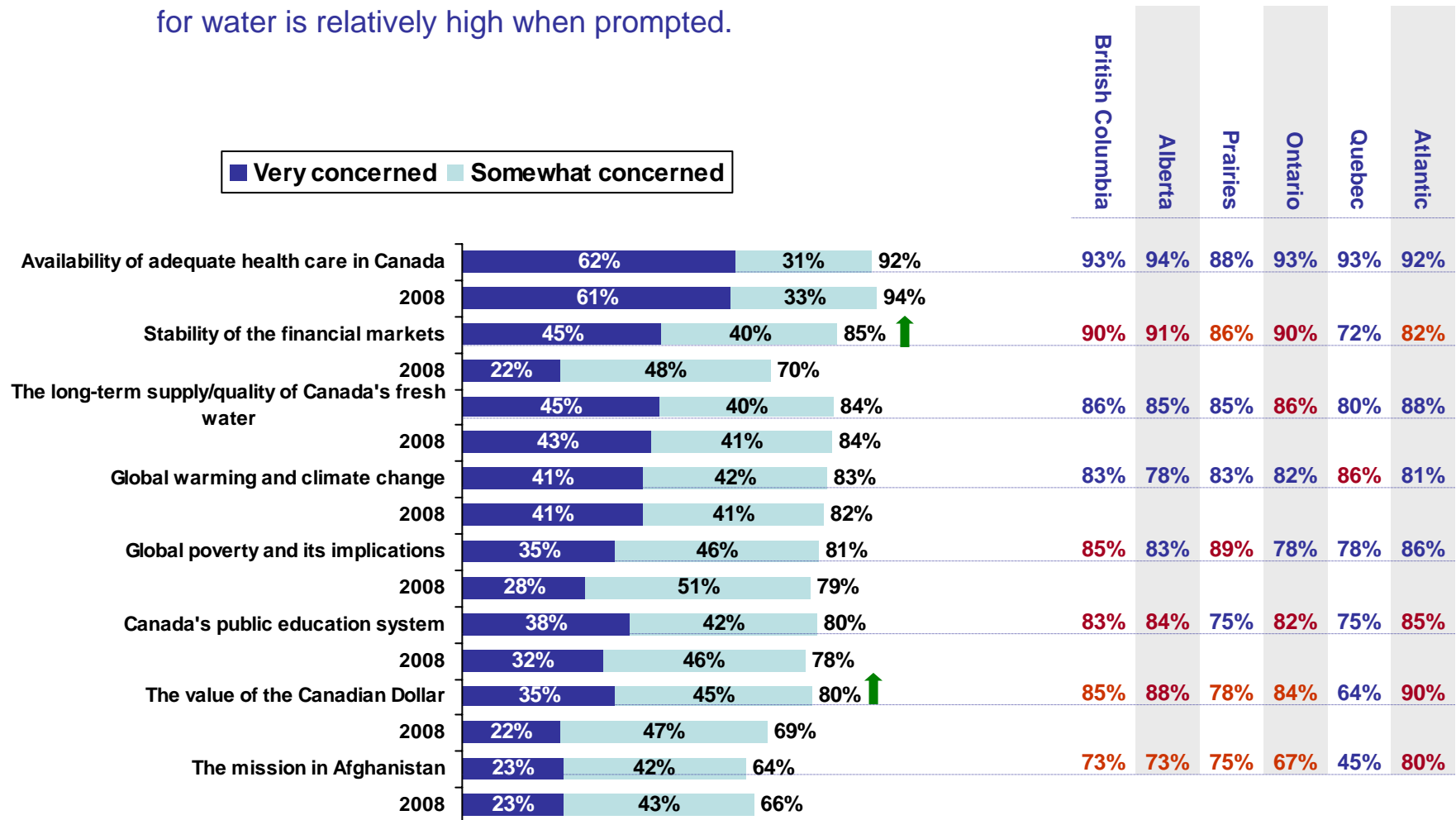
Corporate Actions

- One-in-ten Canadians say they have boycotted a company as a result of learning they misused water. Two in ten say they began supporting a company because they learned that company used water responsibly.
- There is no corporate leader in water protection or conservation. One in ten Canadians are aware of RBC and Unilever's efforts to raise the profile of water protection and conservation. When told of their respective initiatives, the vast majority of Canadians support their involvement in water conservation/protection programs. There is upside potential for being recognized for these initiatives. Three-quarters of Canadians say they feel more favourable toward these companies as a result of learning that they were involved in the initiatives (roughly one-third much more favourable).

Concern for Issues



- Healthcare trumps other concerns below, but concern for water is relatively high when prompted.



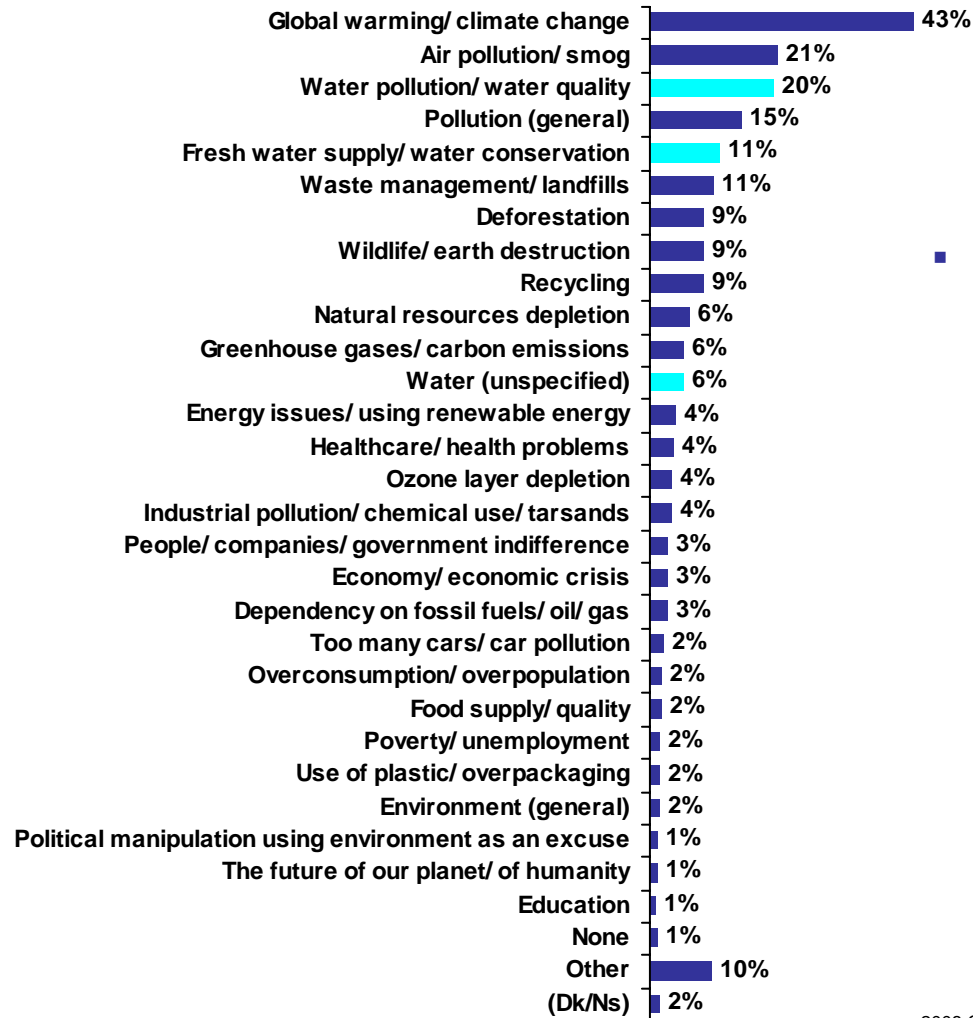
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: 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 2009 n=2165, 2008 n=2309

Most Concerning Environmental Issues (unaided)



TOTAL



- Water is the number three environmental issue behind climate change and air pollution that Canadians are most concerned about, unaided.

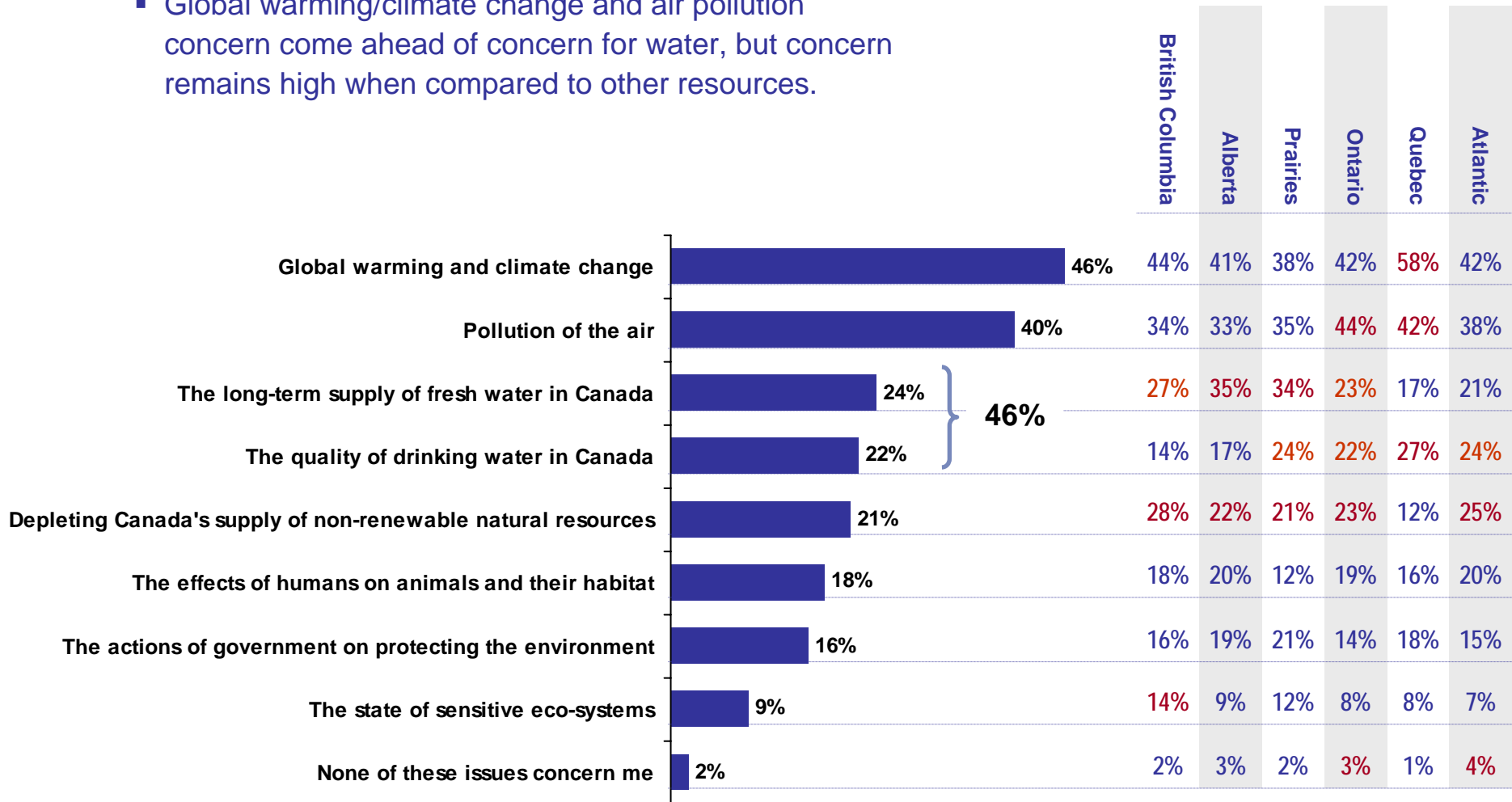
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Now, thinking specifically about the environment, what two issues would you say you're most concerned about?
Base: All Respondents n = 2165

Most Concerning Environmental Issues (aided)



- Global warming/climate change and air pollution concern come ahead of concern for water, but concern remains high when compared to other resources.



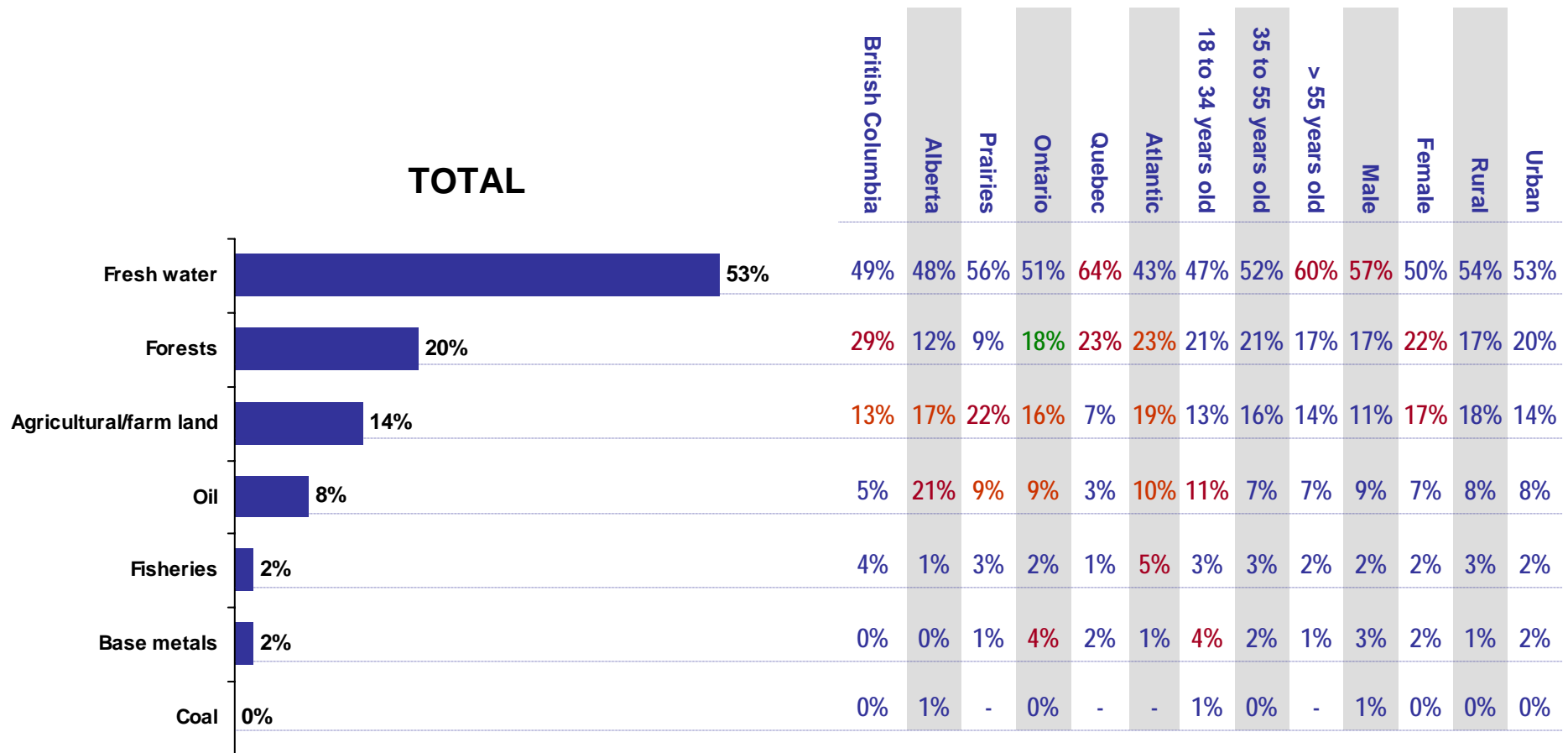
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Once again focusing specifically on the environment, from the list below, please select the two issues below that you're most concerned about:
 Base: All Respondents n = 2165

Consider Canada's Most Important Natural Resource



- In a similar vein, Canadians disproportionately believe that water is Canada's most important natural resource.



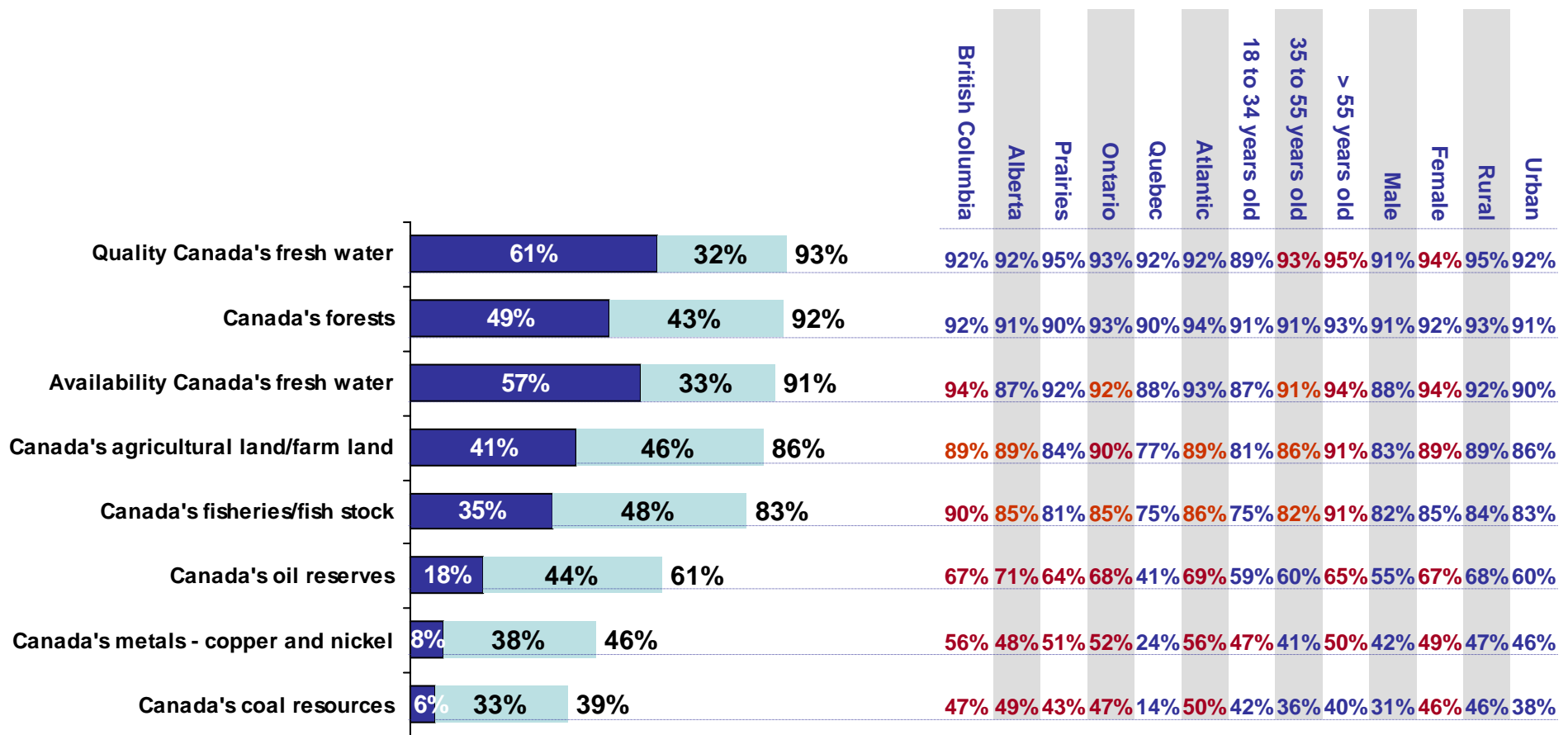
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Which of the following would you consider to be Canada's most important natural resource?
 Base: All Respondents n = 2165

Concern for Natural Resources



- When stacked against other resources in Canada, more are concerned about the declining state of water than any other resources listed.



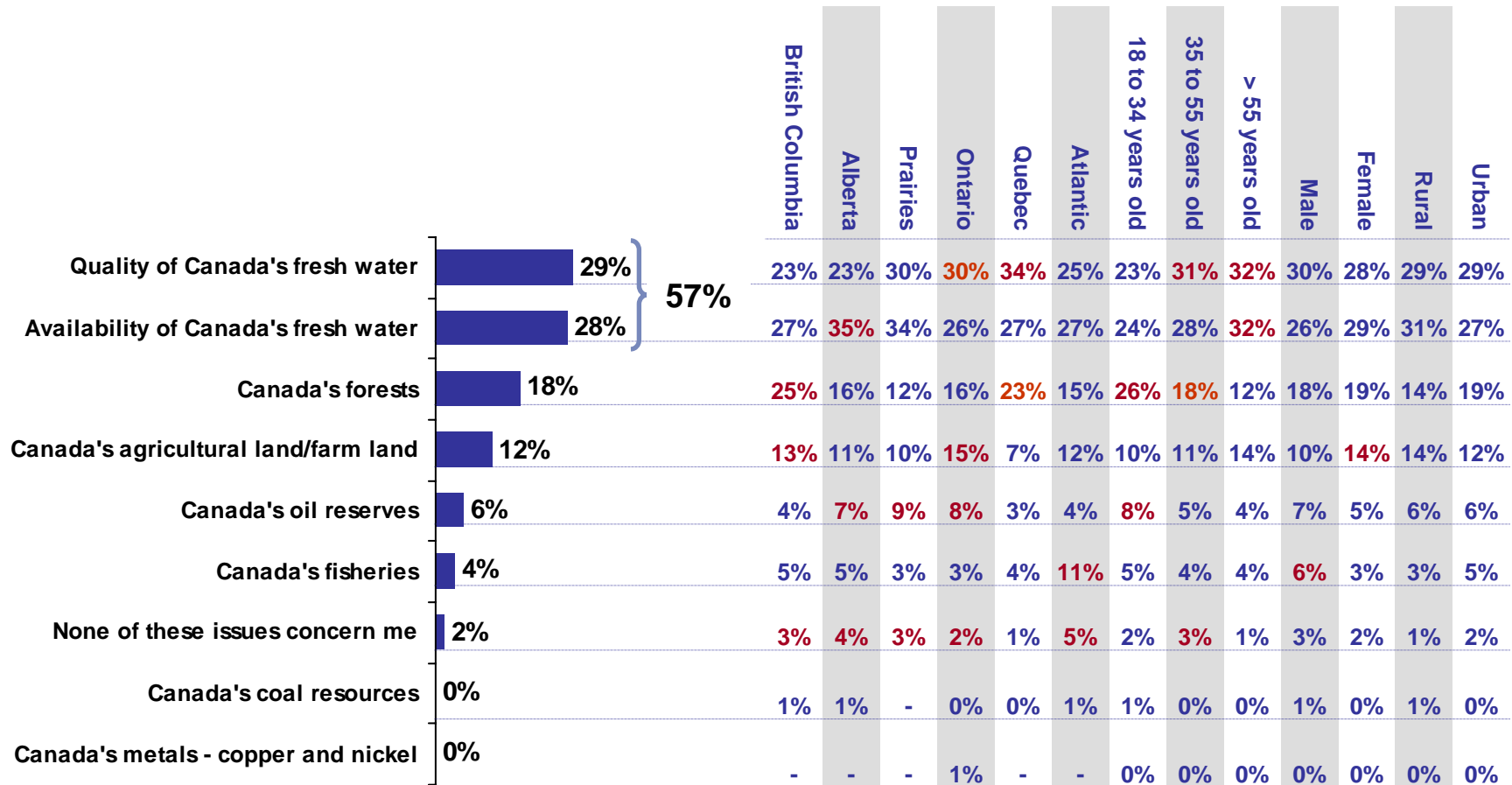
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: How concerned are you about the declining state of following?
 Base: All Respondents n = 2165

Most Concerned About...



- Once again, water is placed ahead of other natural resources, with concern for availability and quality roughly equal.



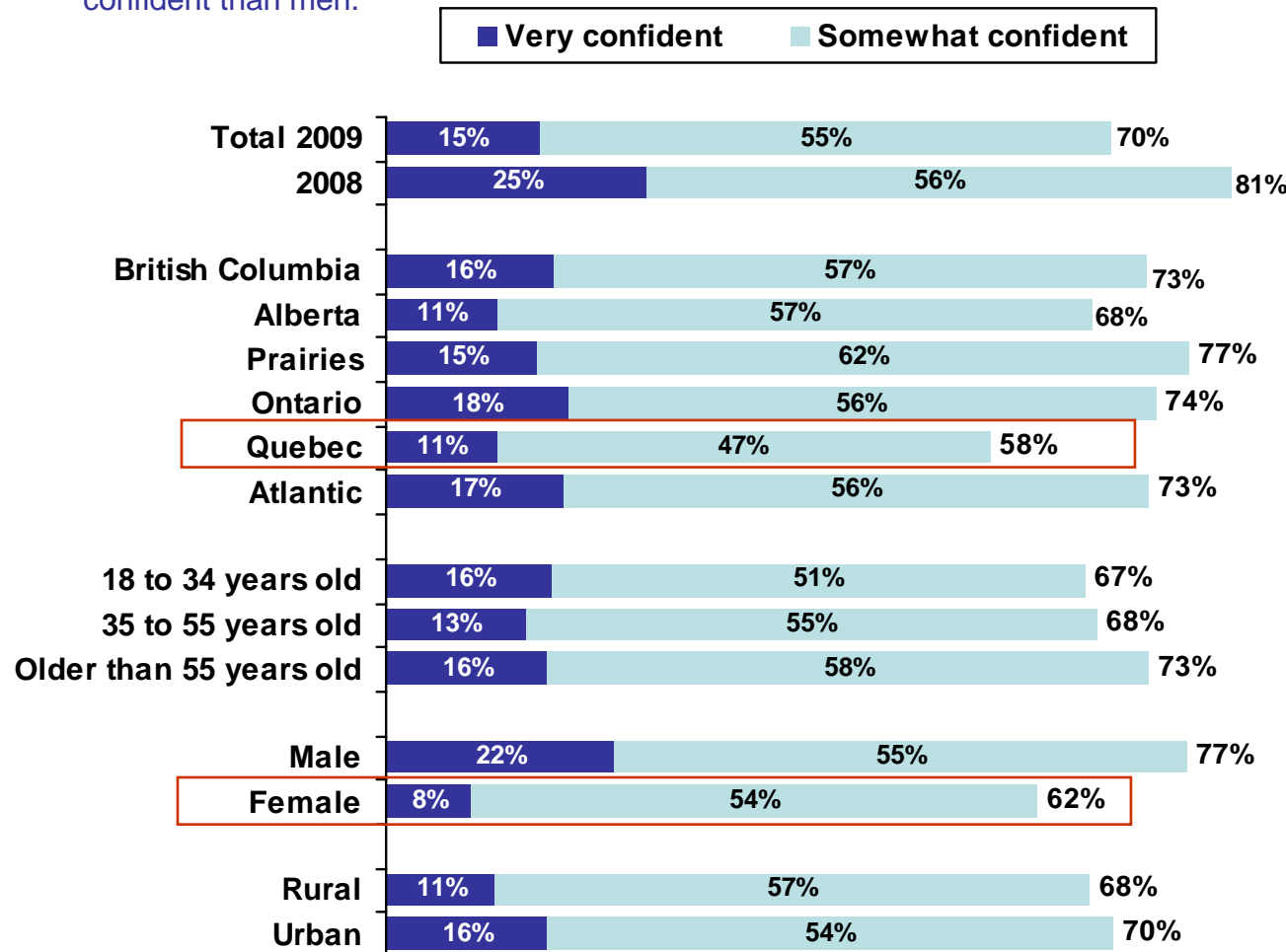
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: And, which are you most concerned about?
 Base: All Respondents 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 declined.
- Quebecers are disproportionately less confident in Canada's long-term supply of fresh water and women are less confident than men.



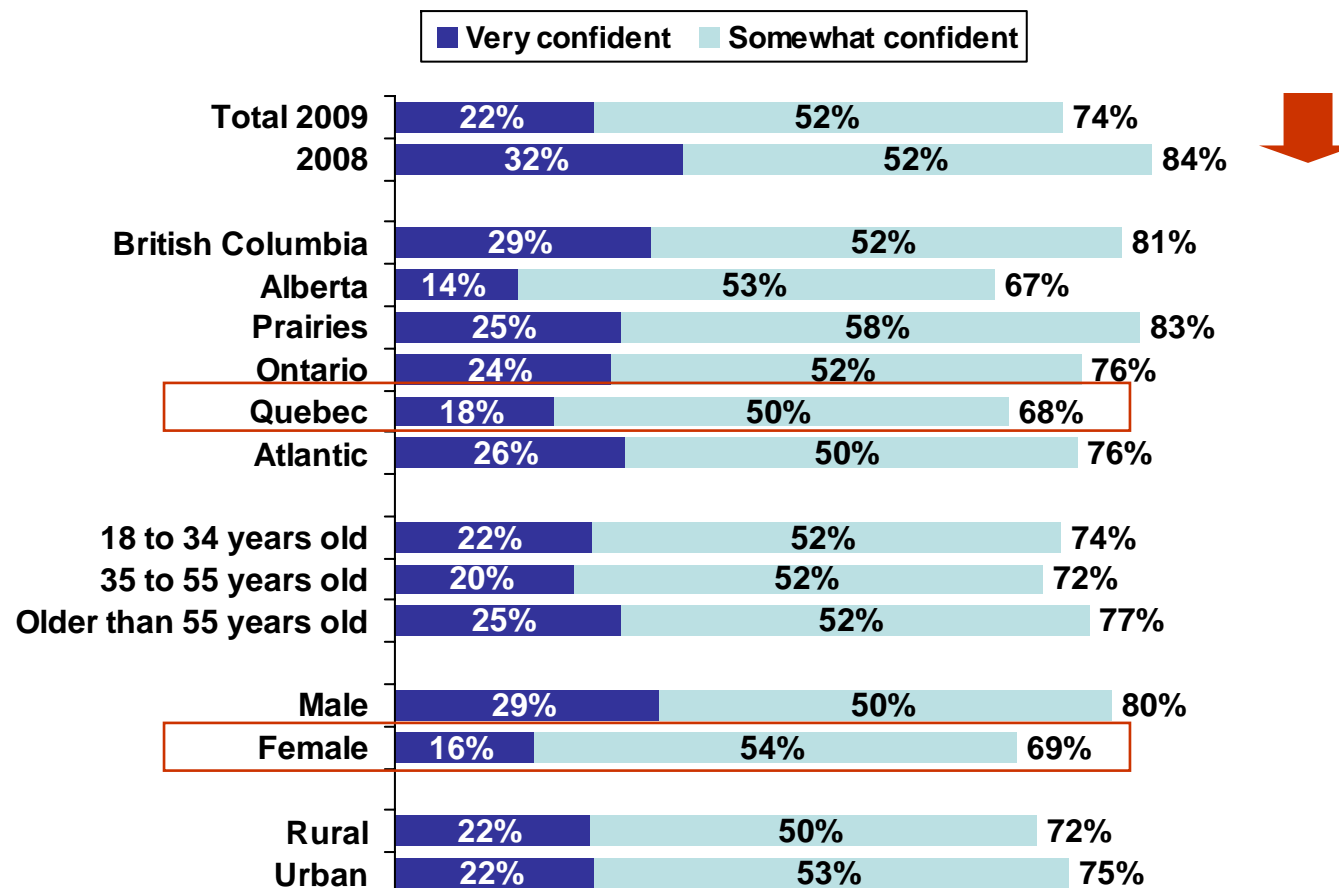
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: 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 2009 n = 2165, 2008 n = 2309

Regional Concerns



- Canadian's confidence in their region's available water has also declined 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.



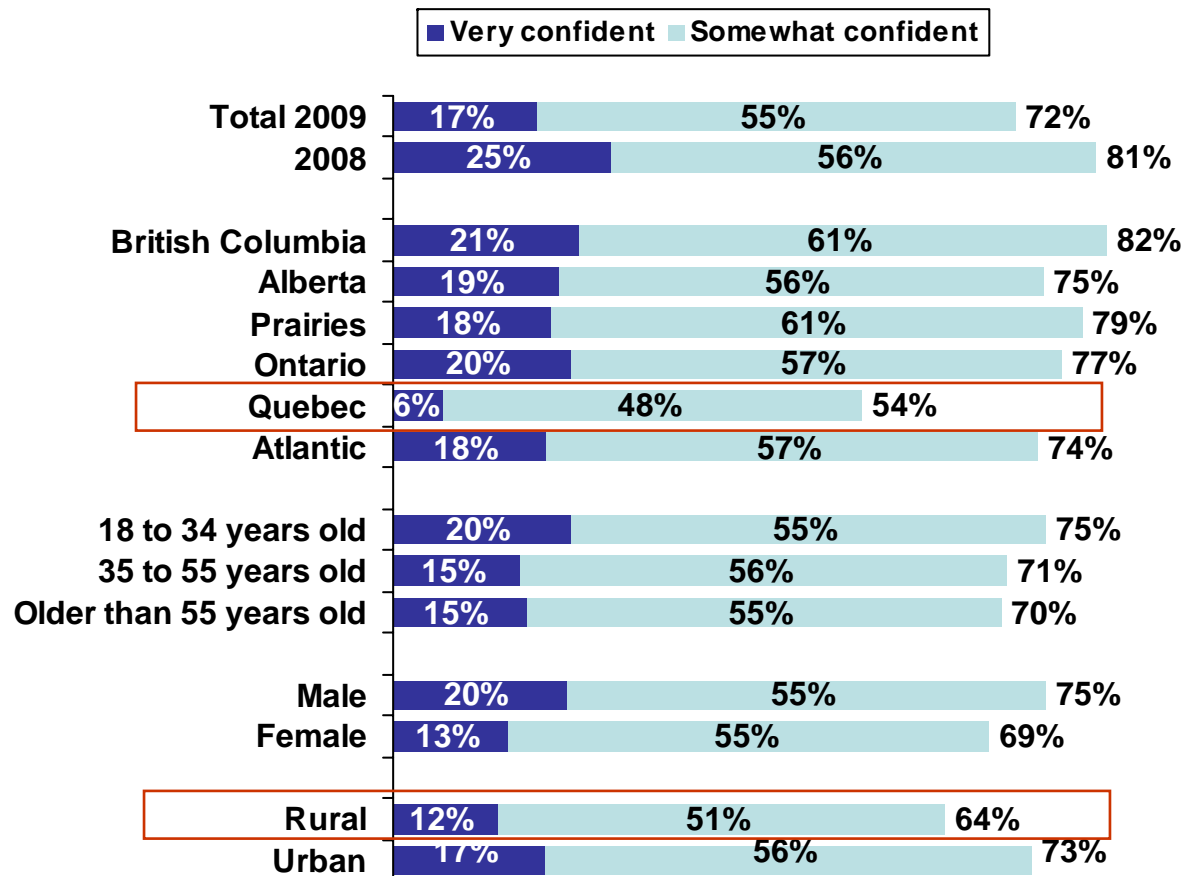
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: 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 2009 n = 2165, 2008 n = 2309

Confidence in the Safety of Water



- Confidence in the safety of Canada's water supply has also declined over the past year. Quebecers are also less confident in the safety of their water as are rural Canadians.



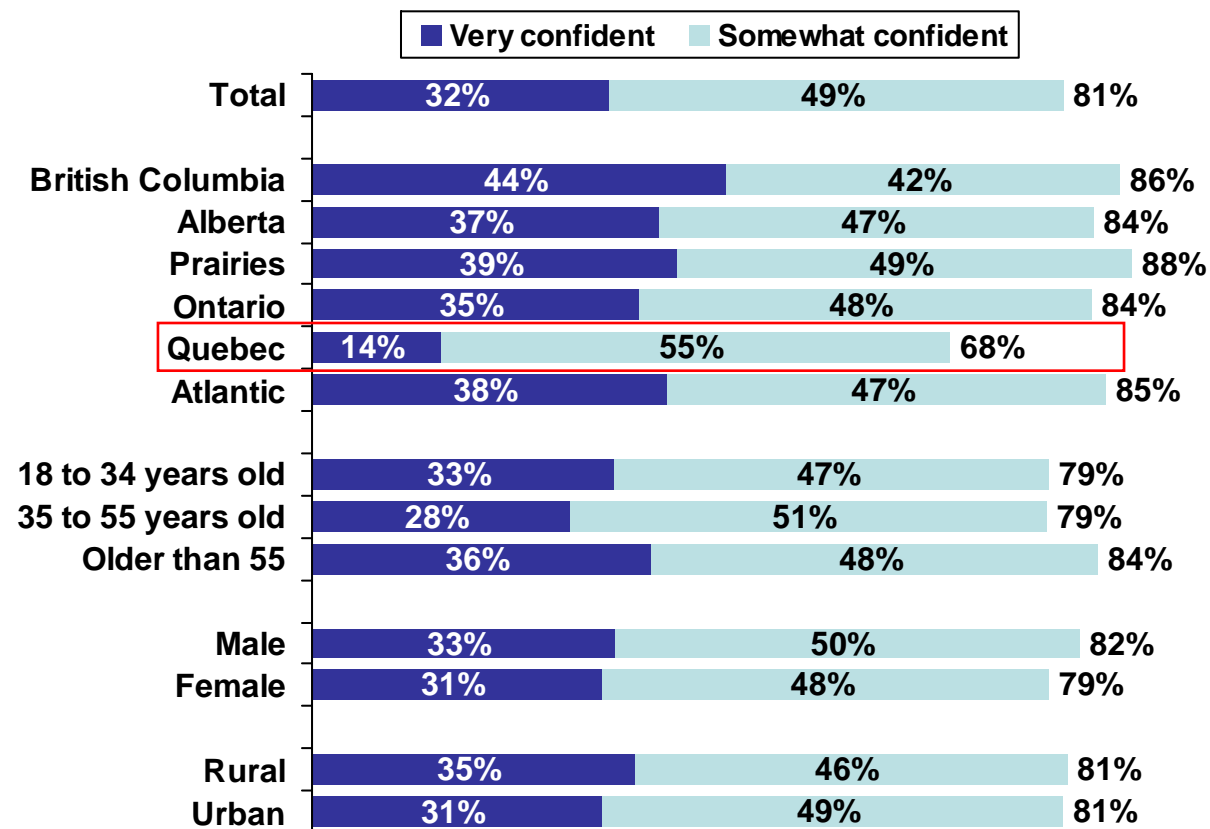
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

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

Confidence in Safety of Water at Home



- Canadians are slightly more confident in the safety of the water in their home than their drinking water in other parts of Canada. Personal opinions about household drinking water are more consistent across groups (although Quebecers again have the most concern).



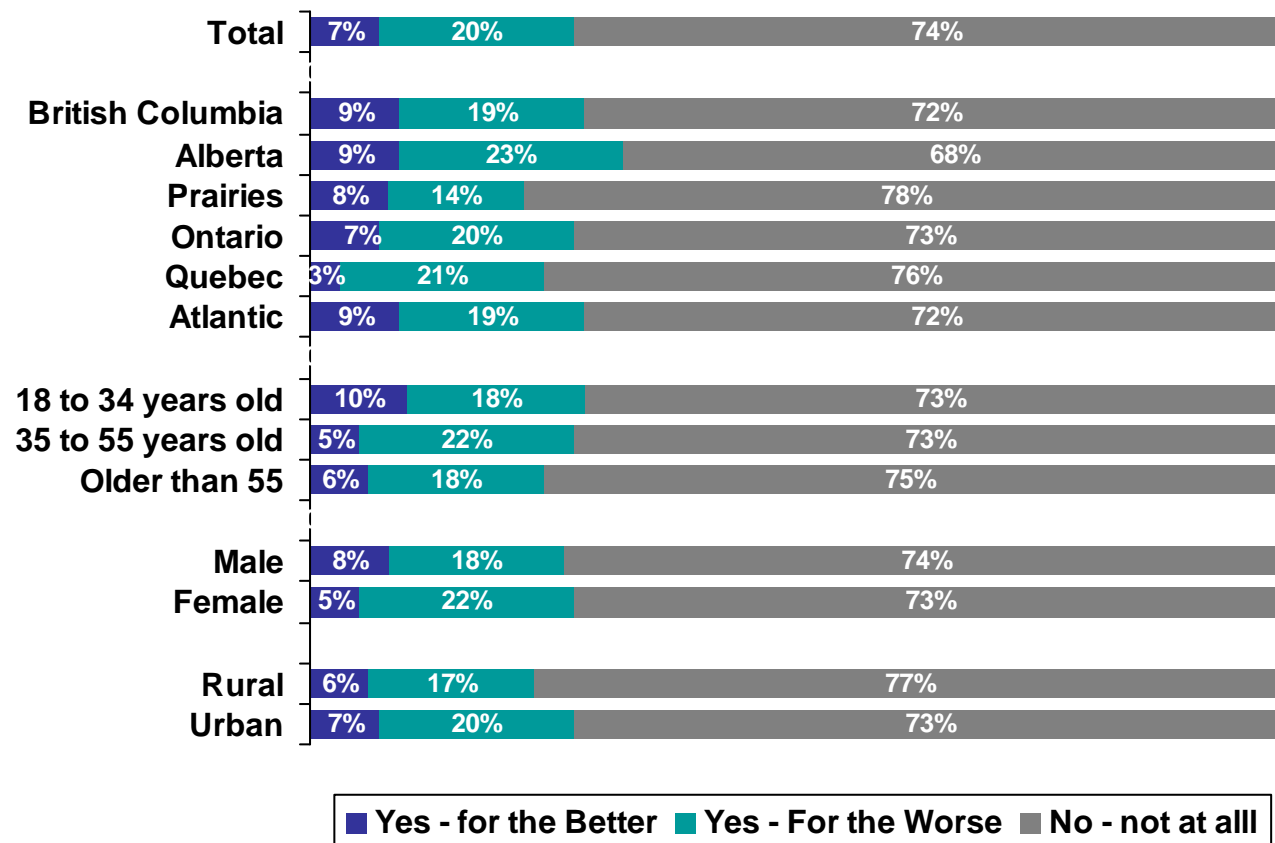
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: And personally how confident are you about the safety and quality of the water in your home?
 Base: All Respondents n = 2165

Noticeable Changes to Quality of Water



- Most Canadians have not noticed any changes to the quality of their tap water. However, by a 3:1 ratio, more have noticed changes for the worse than for the better.



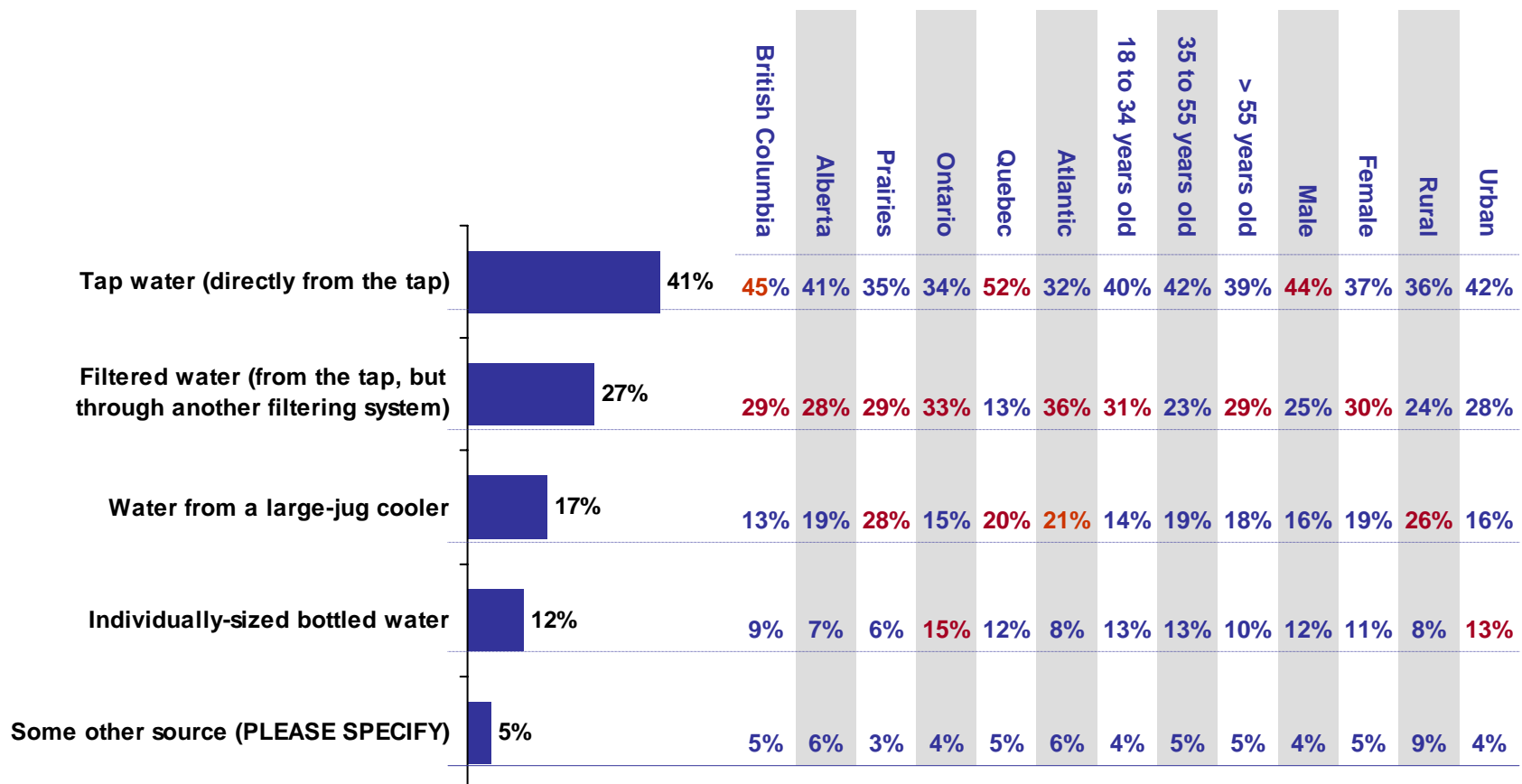
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Have you personally noticed any recent changes to the quality of your tap water?
 Base: All Respondents n = 2165

Drinking Water in the Home



- While most (68%) Canadians still typically drink their tap water, only four in ten drink it directly from the tap. One-third of Canadians do not drink the tap water in their home.



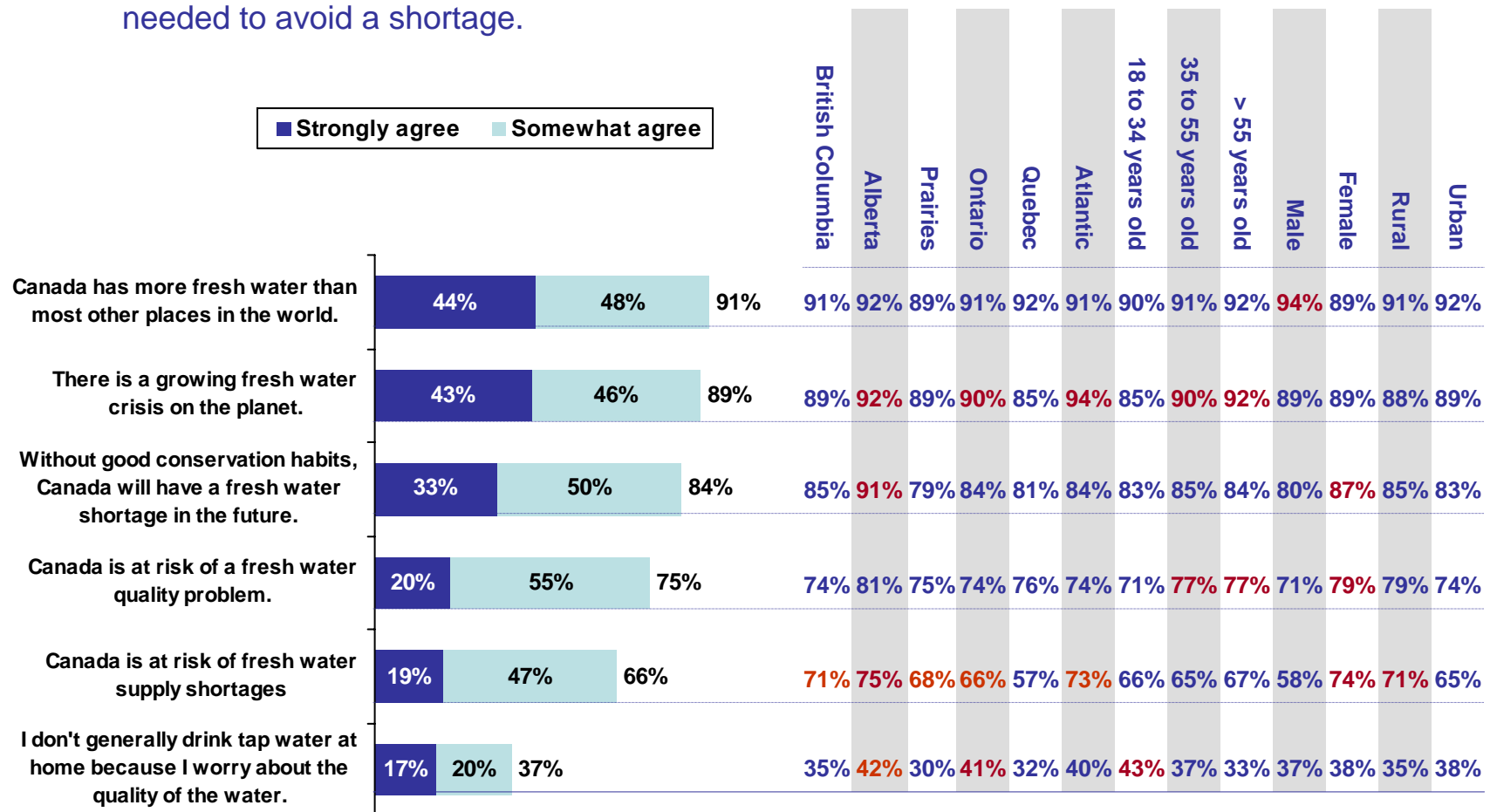
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: In your home, what source of water do you typically drink?
 Base: All Respondents n = 2165

Attitudes Towards Canada's Fresh Water



- Most believe that there is a growing fresh water crisis on the planet, and that we're at risk of a shortage. Slightly more Canadians agree that we are at risk of a quality problem than supply shortages. A large majority of Canadians believe that good conservation habits are needed to avoid a shortage.



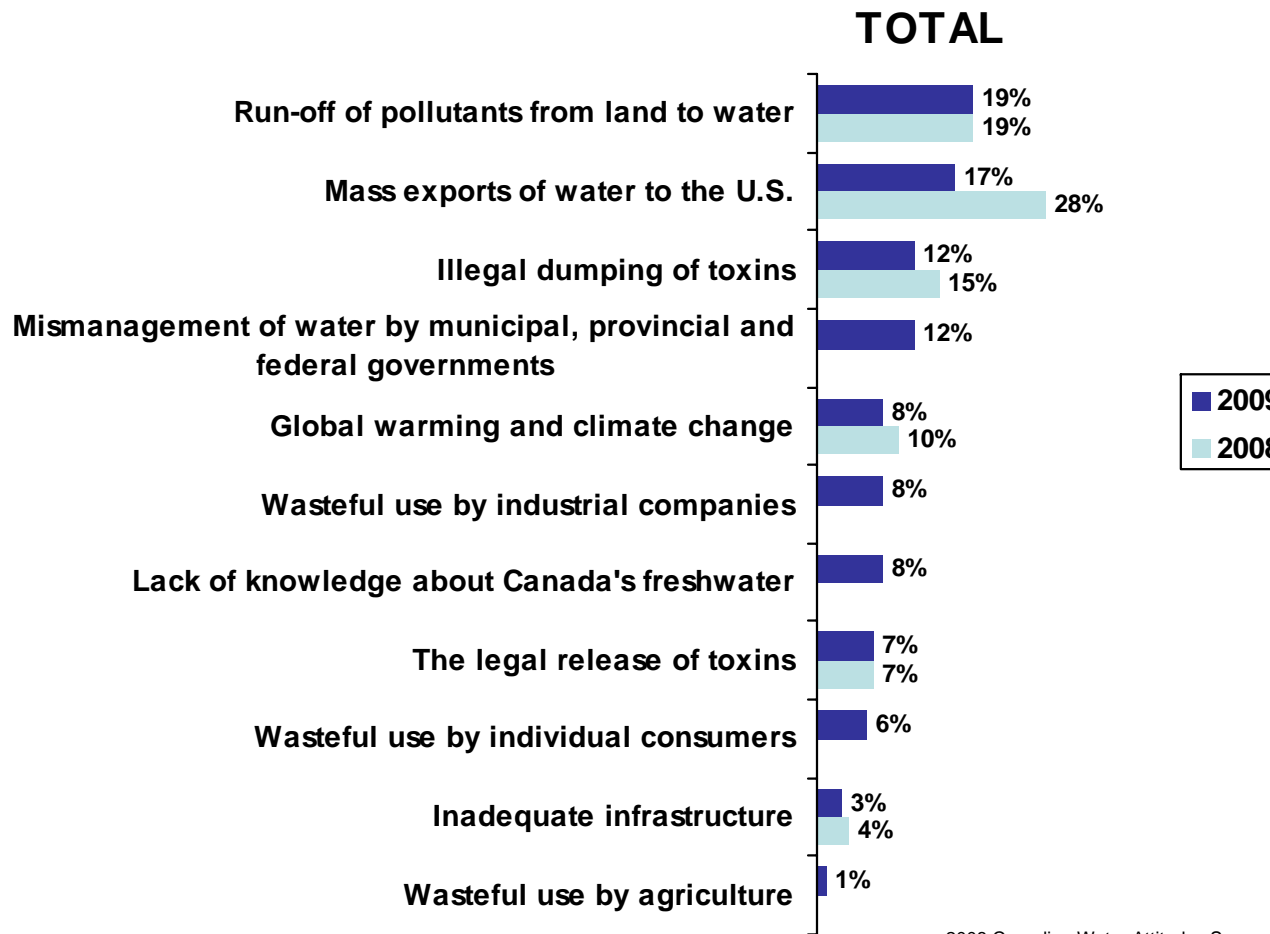
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Do you agree or disagree with following statements
 Base: All Respondents n = 2165

Biggest Threat to Canada's Fresh Water Supply



- Canadians continue to believe that pollutants and mass exports to the US are the biggest threat to Canada's fresh water supply. Only 6% unaided mention individual consumers as a top threat.



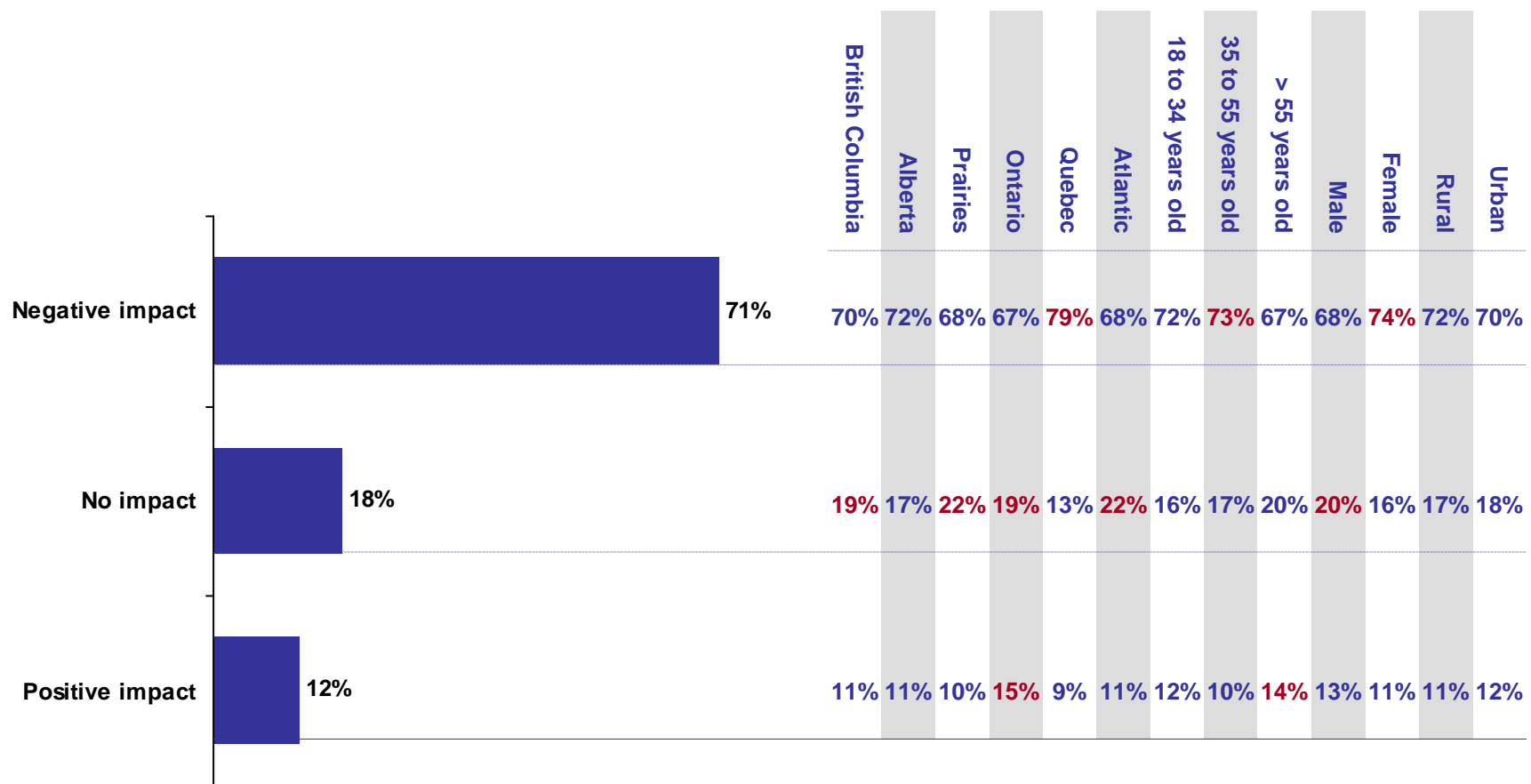
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: What do you think is the biggest threat to Canada's freshwater supply? [select one only]
Base: All Respondents 2009 n = 2165, 2008 n = 2309

Impact of Climate Change on Canada's Supply and Quality of Fresh Water



- Most believe that climate change will have a negative impact on Canada's supply and quality of fresh water. However, roughly one in eight (12%) believe that the impact will be positive for Canada.



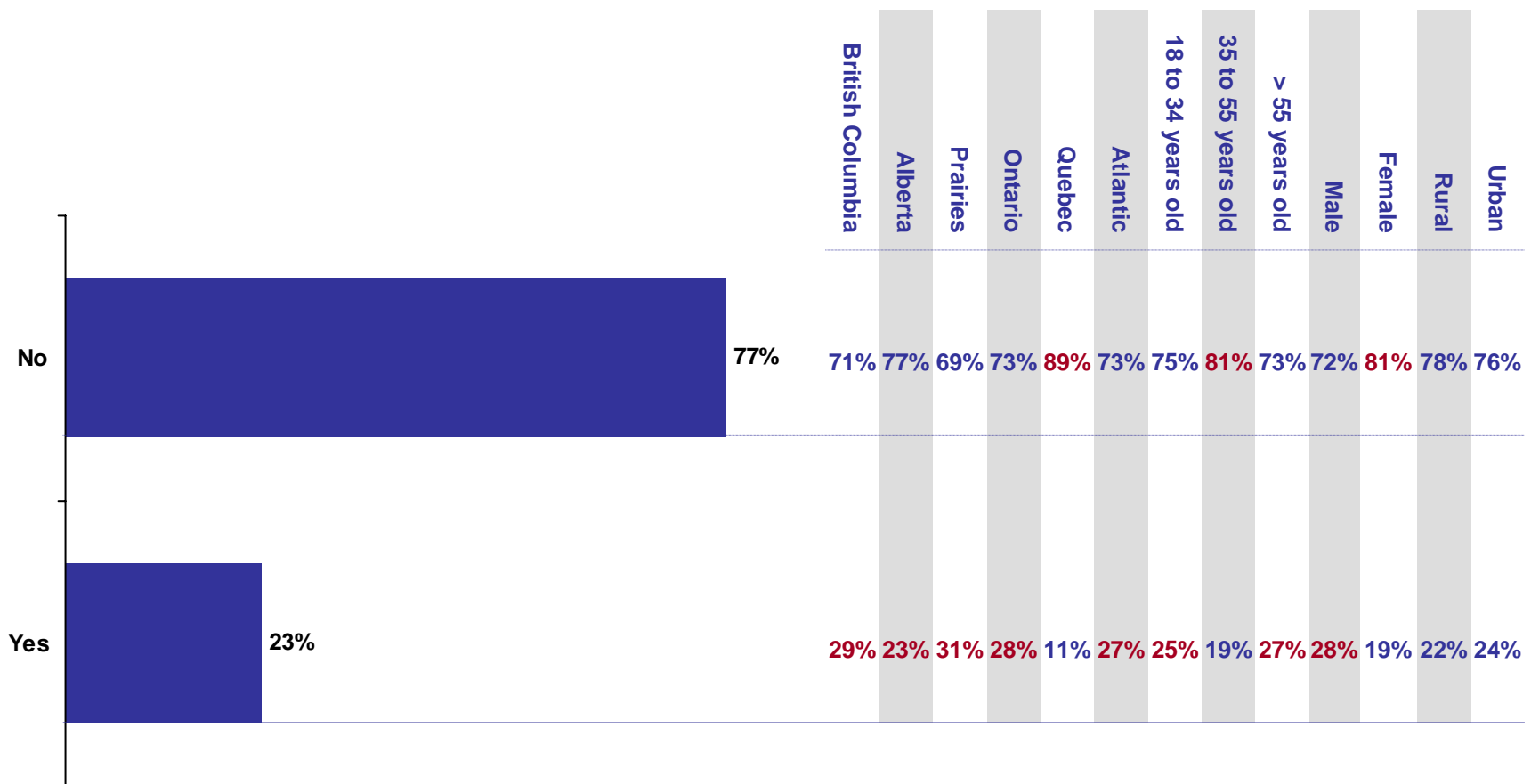
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: What impact, if any do you believe climate change will have on Canada's supply and quality of fresh water?
 Base: All Respondents n = 2165

Awareness of Any Laws or Regulations That Protect Canada's Supply of Fresh Water



- Canadians are by and large unaware of any laws or regulations that protect Canada's supply of fresh water.



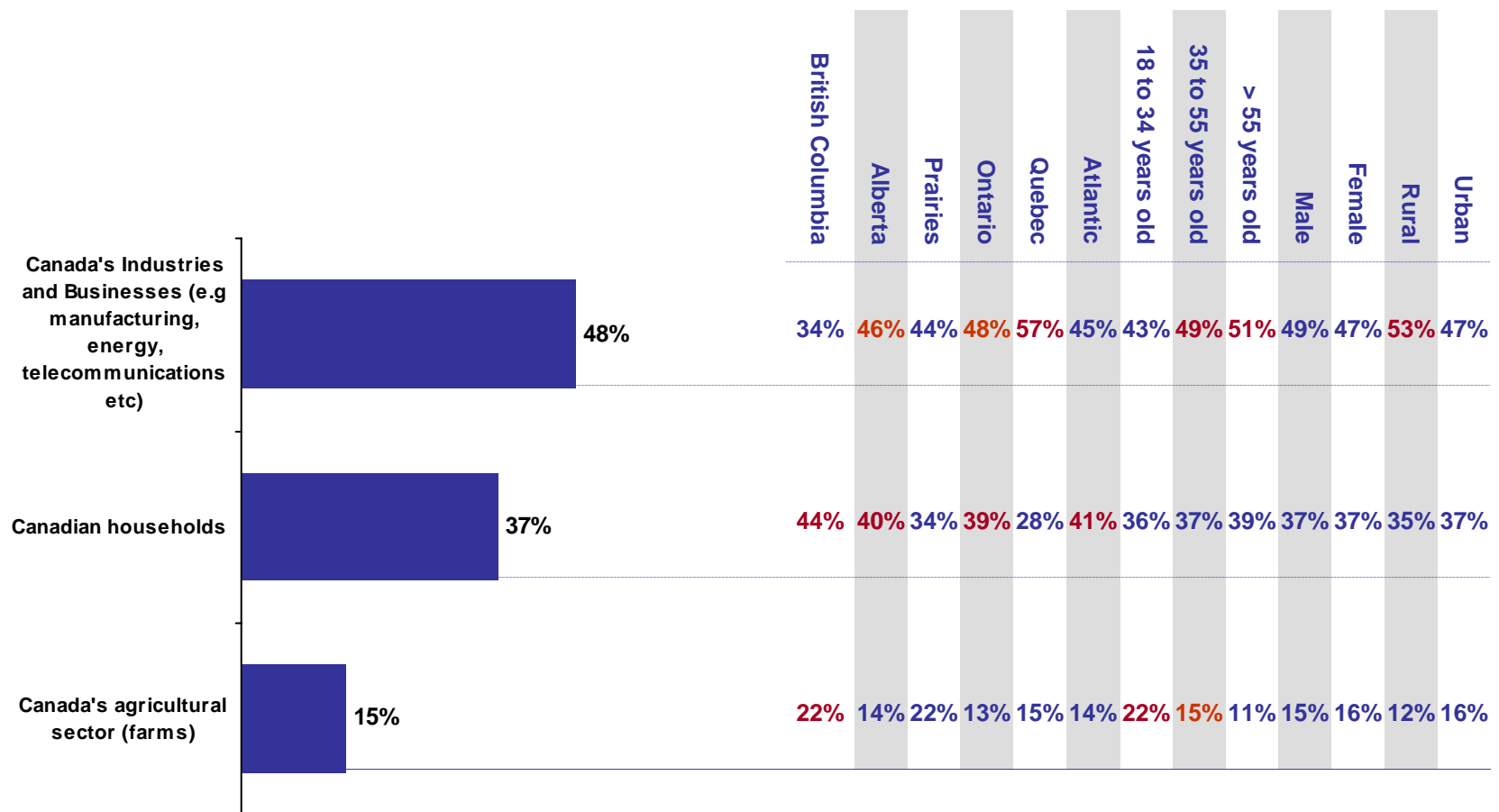
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Are you aware of any laws or regulations that protect Canada's supply of freshwater?
 Base: All Respondents n = 2165

Largest Water Consumers



- More Canadians believe industry and business uses more water than households. This could suggest a “not my fault” attitude.



2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

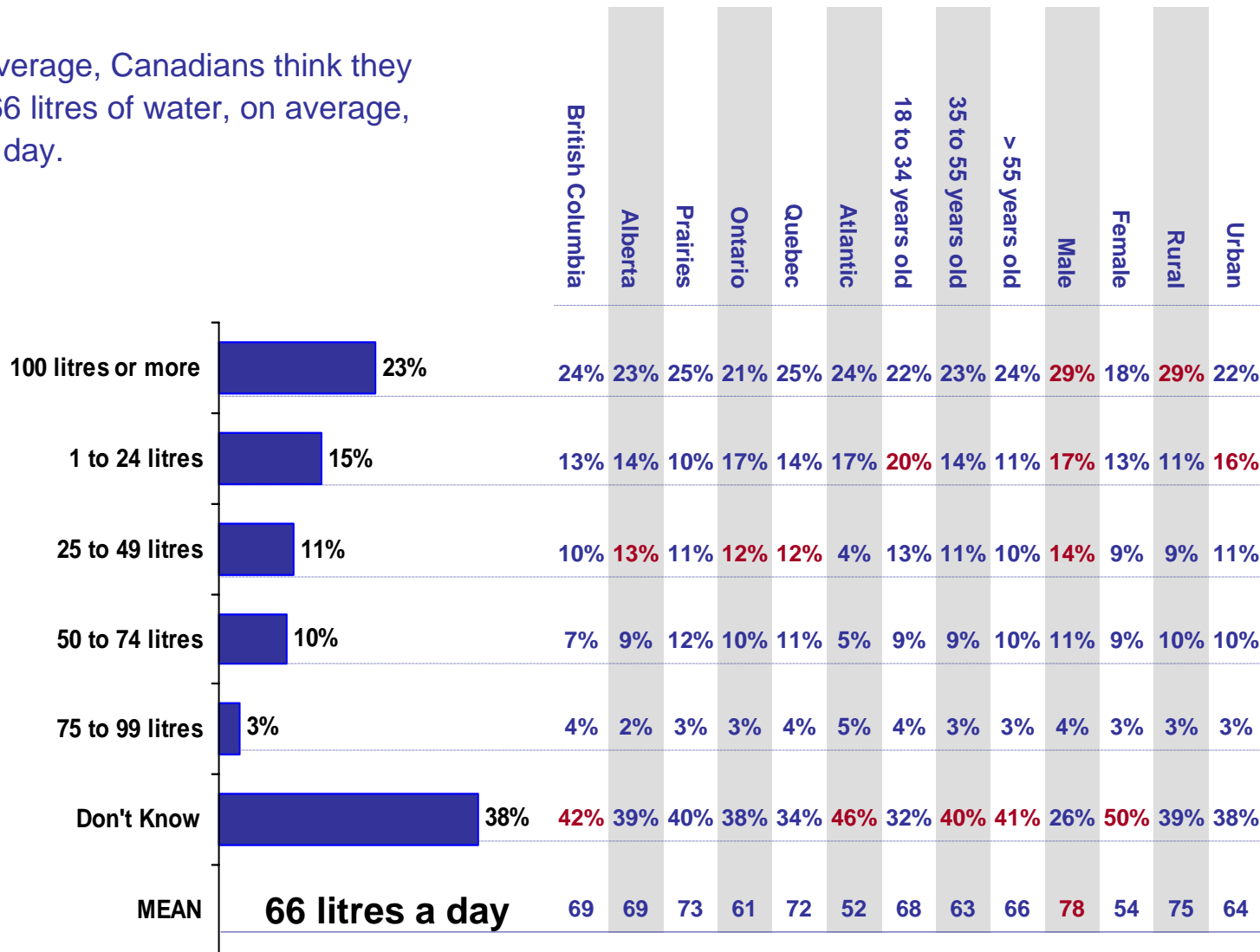
Question: Which one of the following do you believe uses the most fresh water?
 Base: All Respondents n = 2165

Total Amount of Water You Use Personally in an Average Day



- On average, Canadians think they use 66 litres of water, on average, each day.

Correct answer



2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

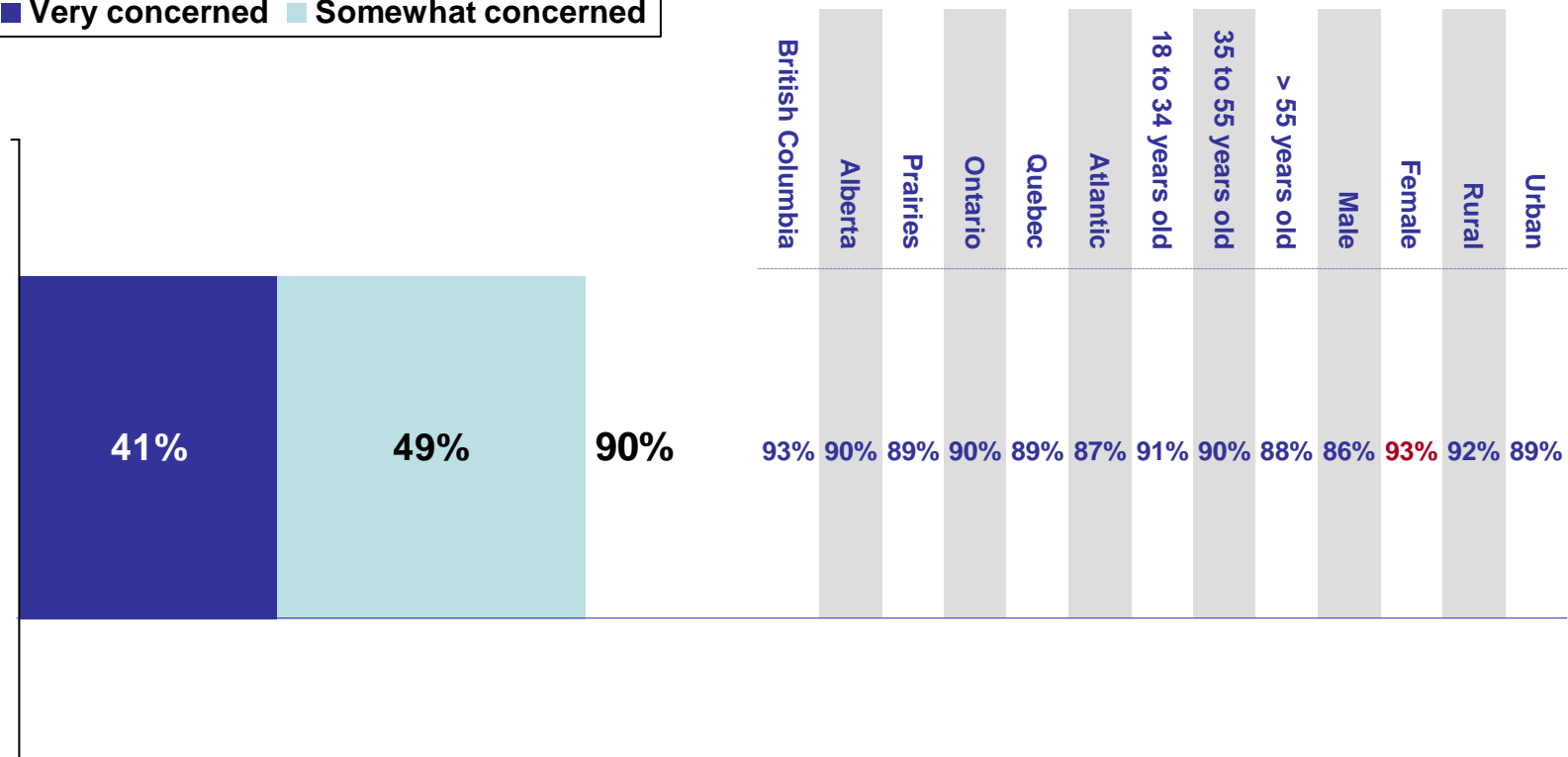
Question: If you had to guess, what do you think is the total amount of water you personally use in an average day including drinking, showering, bathing, toilet flushing, laundry, dish washing etc. Base: All Respondents n = 2165

Level of Concern About Canadian's Water Usage



- After hearing about the average Canadian's use of water (329 litres), most are concerned about Canadians' water usage.

■ Very concerned ■ Somewhat concerned



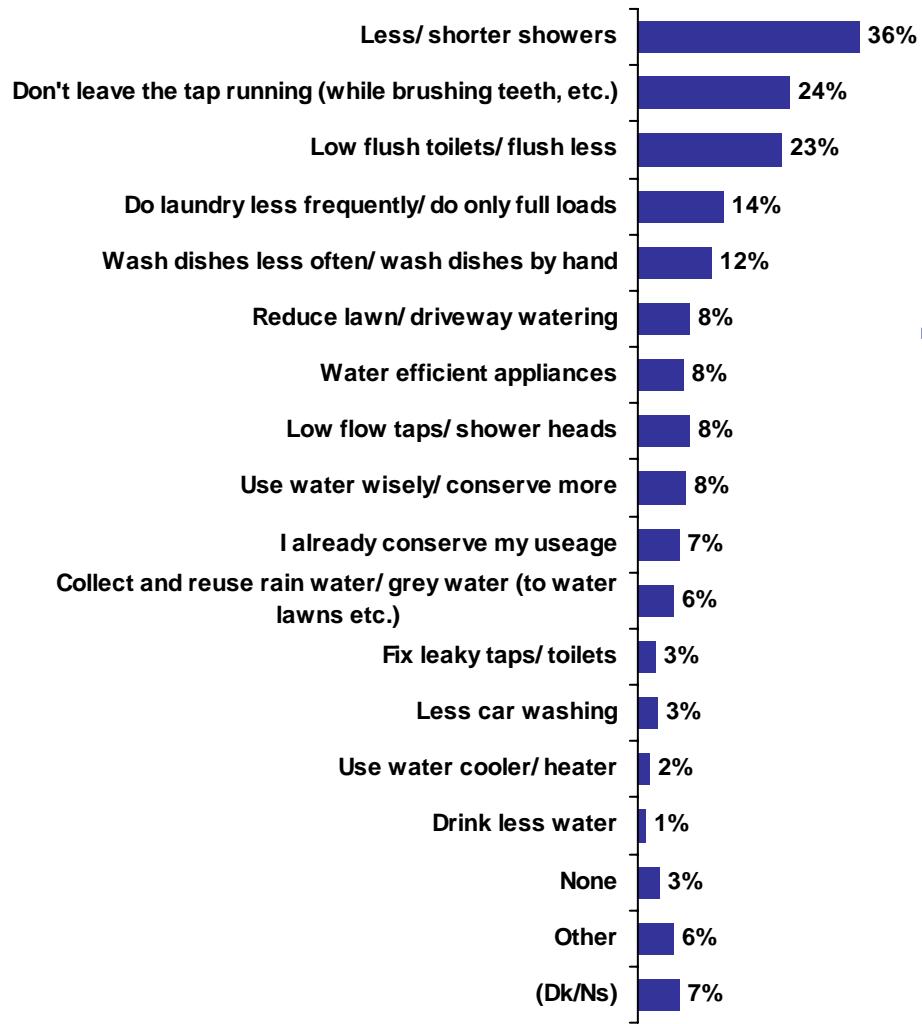
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: 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 n = 2165

Ideas To Personally Reduce Water Consumption



TOTAL



- Conservation in the bathroom leads the list of ideas to personally reduce amount of water used.

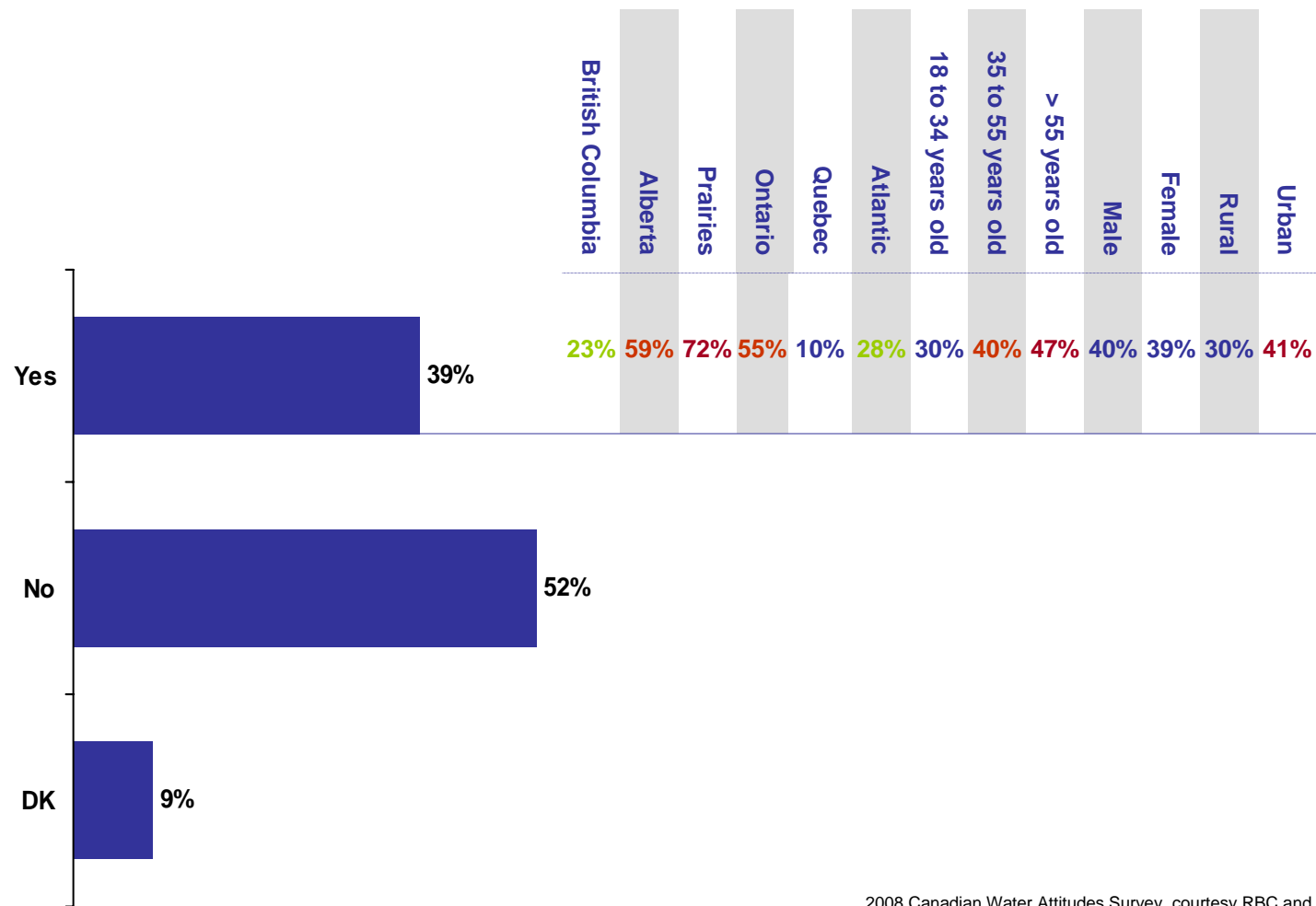
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: How do you think you personally could reduce the amount of water you use?
Base: All Respondents n = 2165

Have a Water Meter



- The incidence of water meters in homes varies greatly across the country.



2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Do you have a water meter?
Base: All Respondents n = 2165

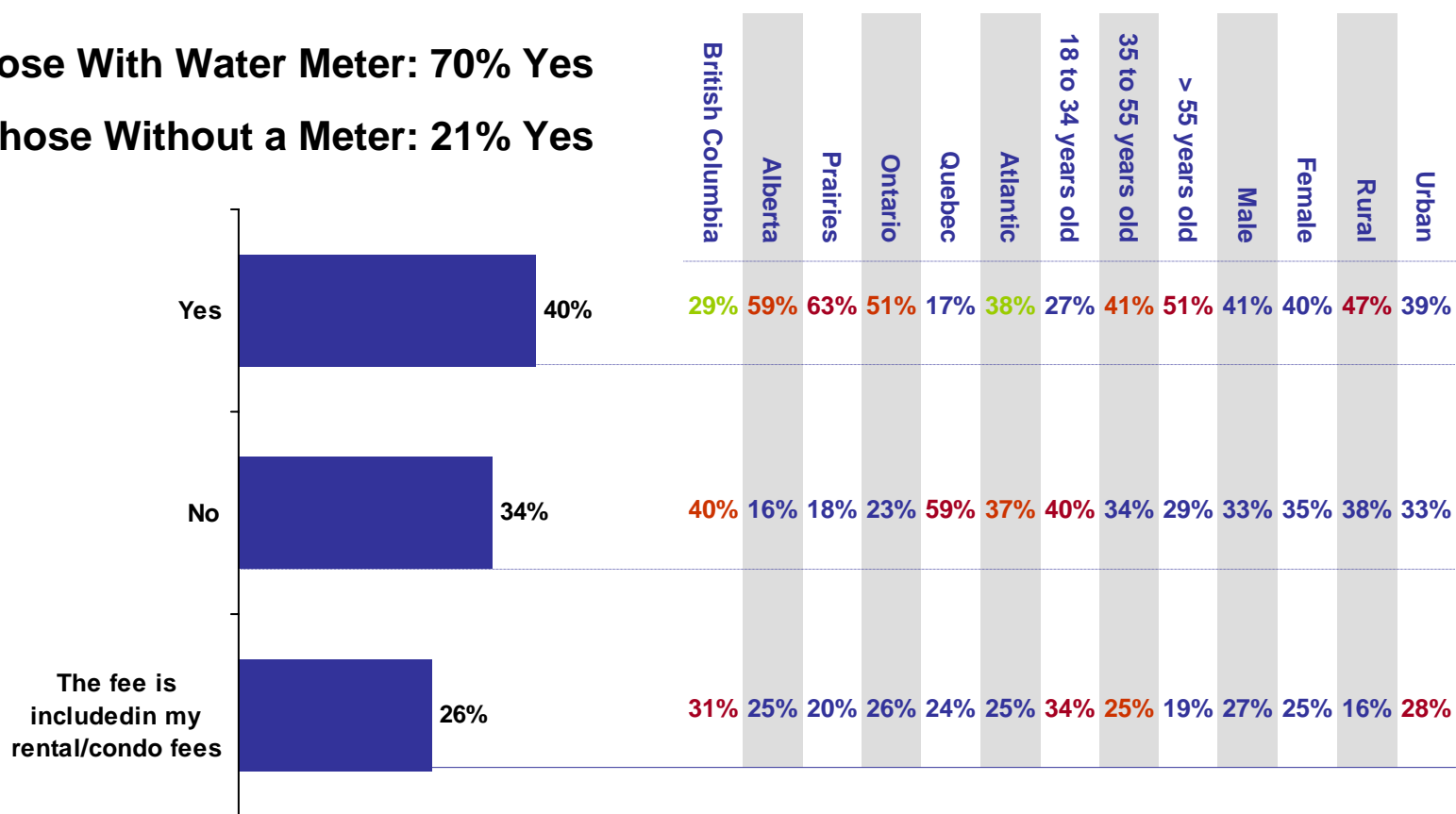
Knowledge of Monthly Water Bill



- Among those whose water bill is not included in their rental/condo fees, more (54%) know than don't know (46%) how much they pay.

Those With Water Meter: 70% Yes

Those Without a Meter: 21% Yes



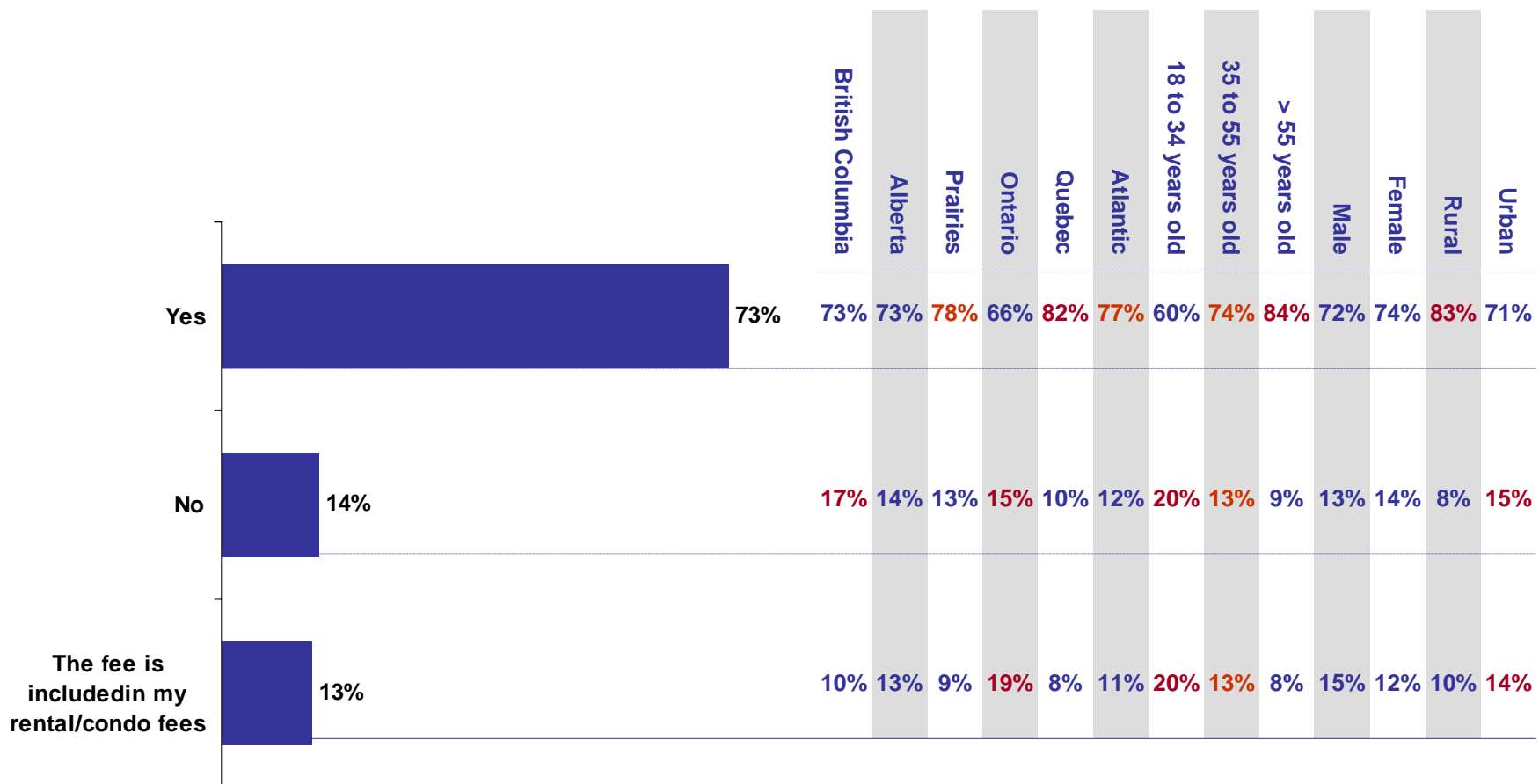
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Do you know how much you pay for the following each month?
Base: All Respondents n = 2165

Know How Much You Pay Your Household Electricity Each Month



- Awareness of electricity payments appears to be higher, as most (84%) of those whose fee is not included in other payments know, and few (16%) don't know what they pay each month.



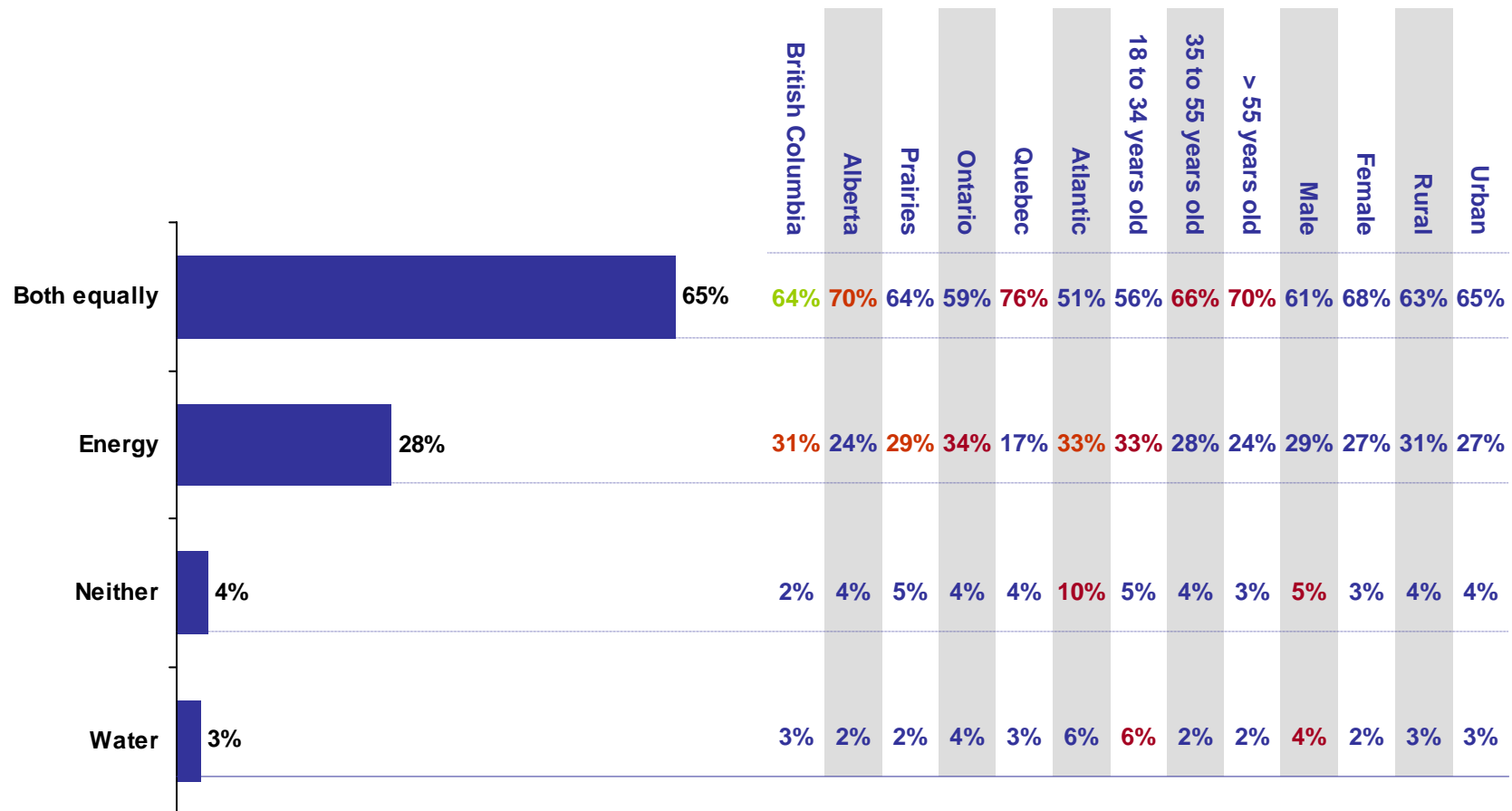
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Do you know how much you pay for the following each month?
Base: All Respondents n = 2165

Consciously Put More Effort Into Reducing Your Energy Consumption or Your Water Consumption



- Most say they put an equal amount of effort into reducing their energy and water consumption, but significantly more put a greater effort into saving energy than water.



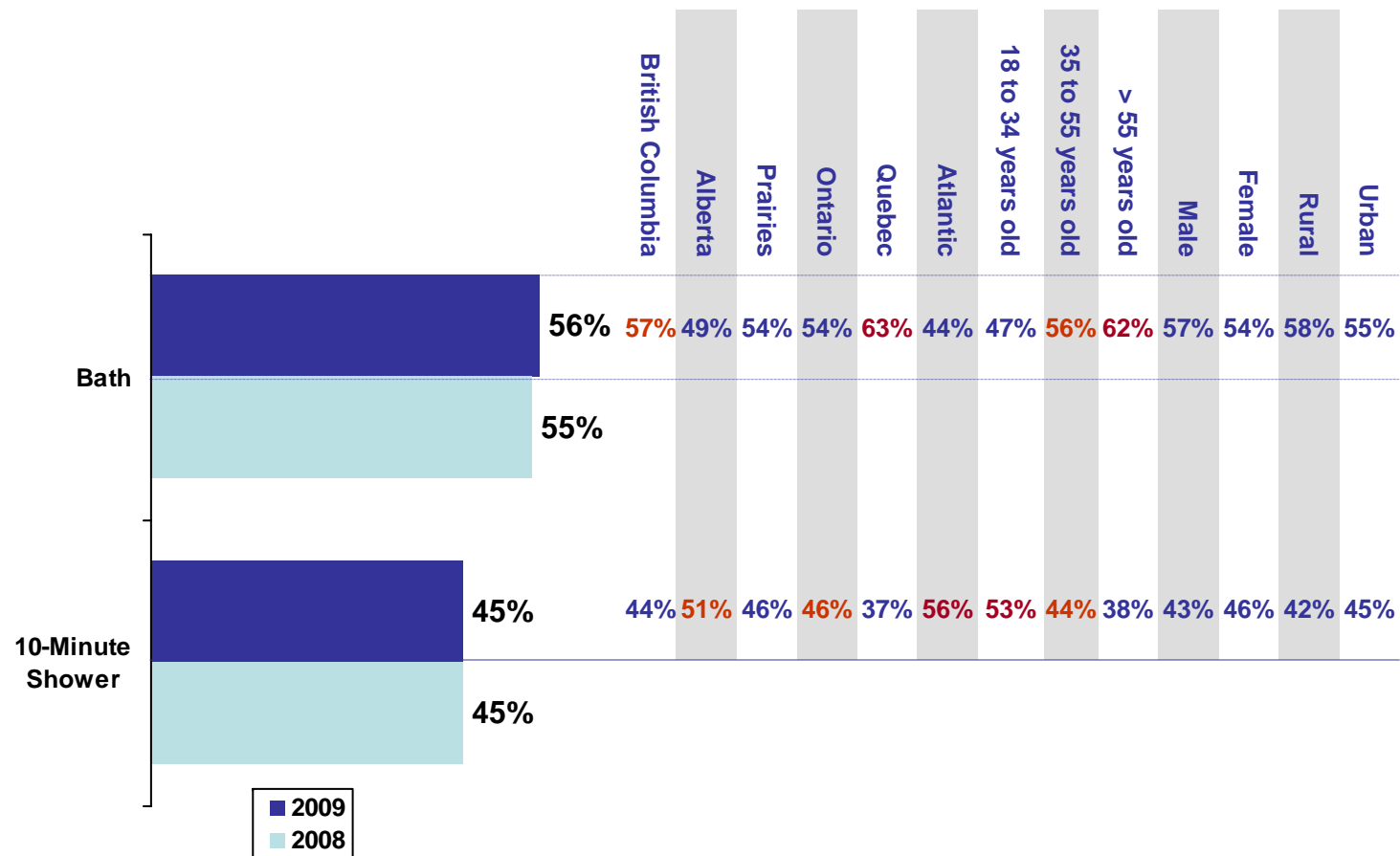
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Do you consciously put more effort into reducing your energy consumption (electricity) or your water consumption?
 Base: All Respondents n = 2165

Bath versus Shower



- Just over half of Canadians correctly know that a bath uses more water than a 10-minute shower.



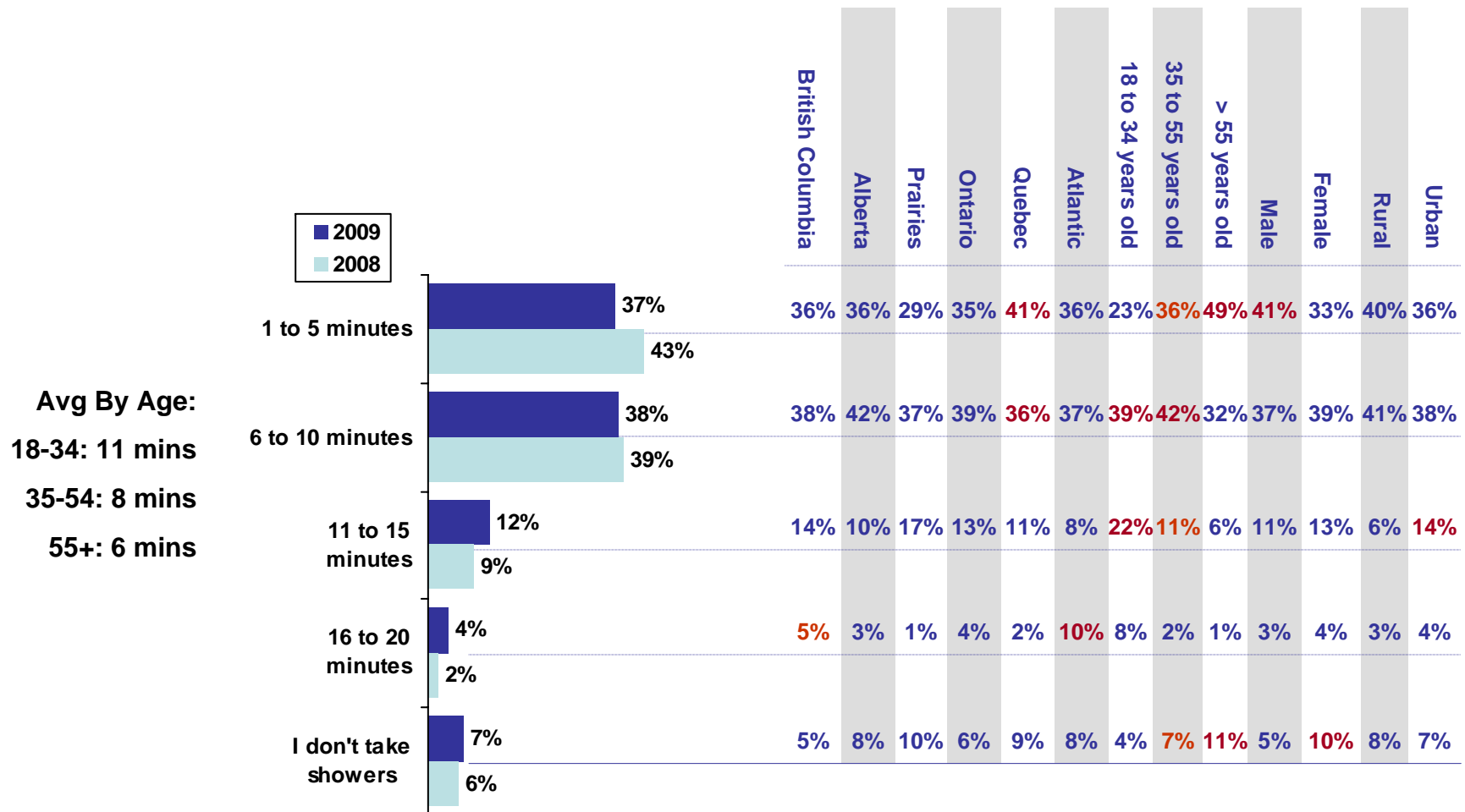
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Which do you think uses more water?
 Base: All Respondents 2009 n = 2165, 2008 n=2309

Average Length of Time You Spend in the Shower



- Canadians on average spend 8.1 minutes in the shower, up from 7.6 minutes last year.



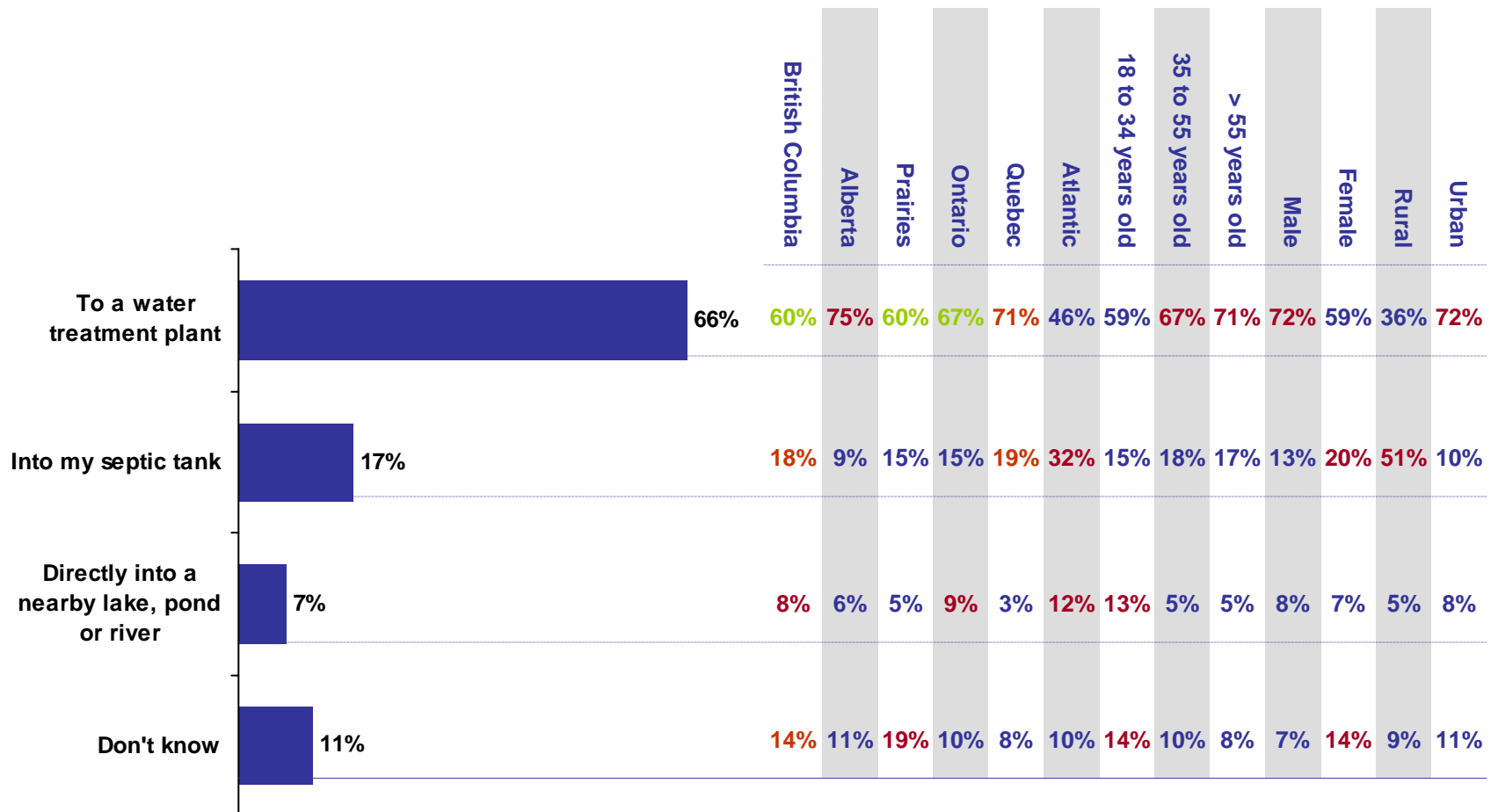
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: What is the average length of time you spend in the shower?
 Base: All Respondents 2009 n = 2165, 2008 n = 2309

Water Down The Drain In The Home...



- Two-thirds (66%) know that water from their drains or toilets goes to a treatment plant or septic tank.



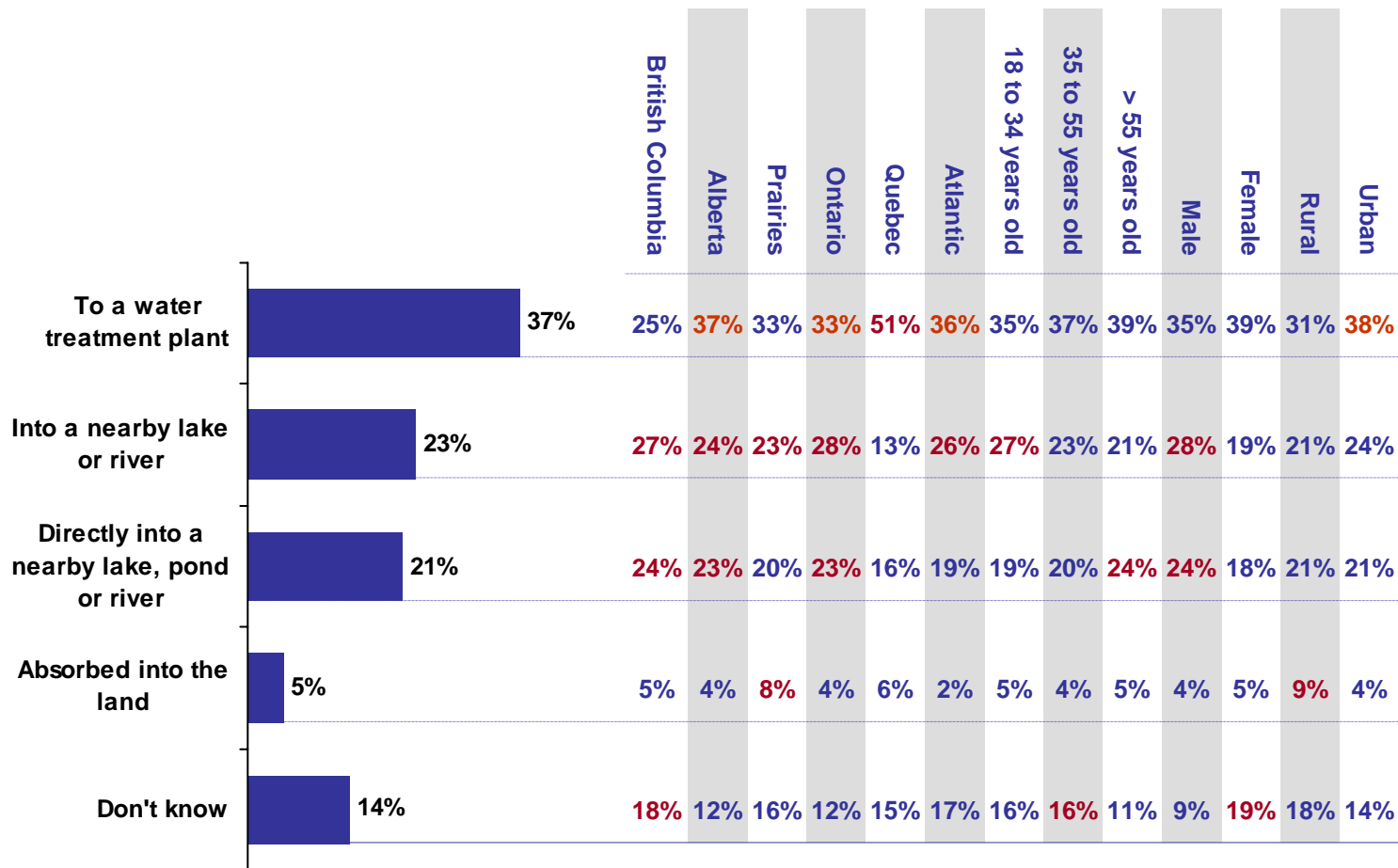
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Where do you think water goes when it goes down your drains or toilets at home?
 Base: All Respondents n = 2165

Water Down Storm Drains...



- But a plurality also thinks that water down the storm drains heads to a water treatment plant as well.



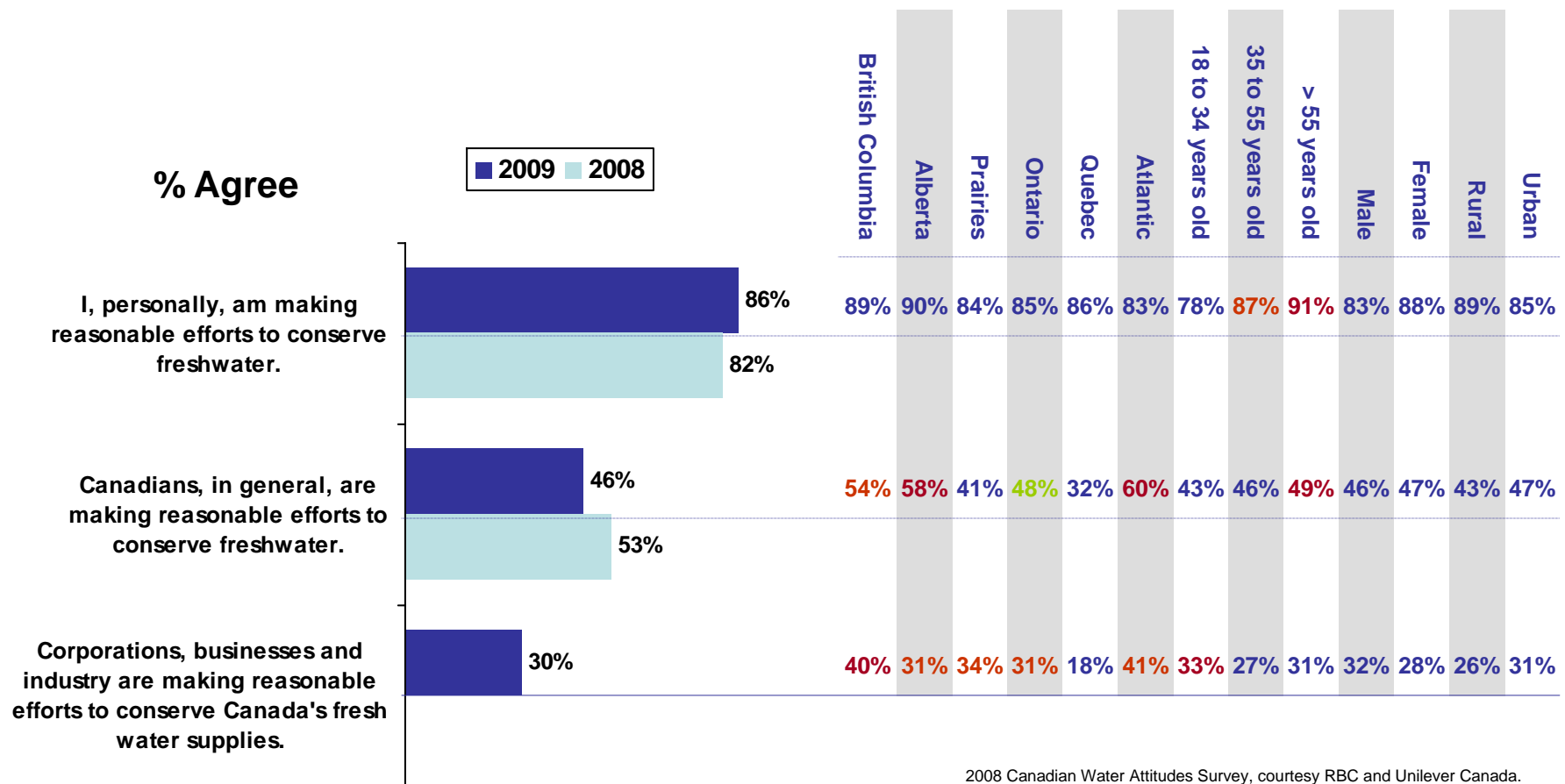
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: And where do you think water goes when it goes down storm drains on the street?
 Base: All Respondents n = 2165

Attitudes Towards Conservation



- Most people think they make reasonable efforts to conserve water. But they don't think the same about everyone else... Canadians are even less likely now to believe that Canadians are making reasonable efforts to conserve water (46% versus 53%). Once again, this suggests an attitude where it is always somebody else's fault, and not one's own.



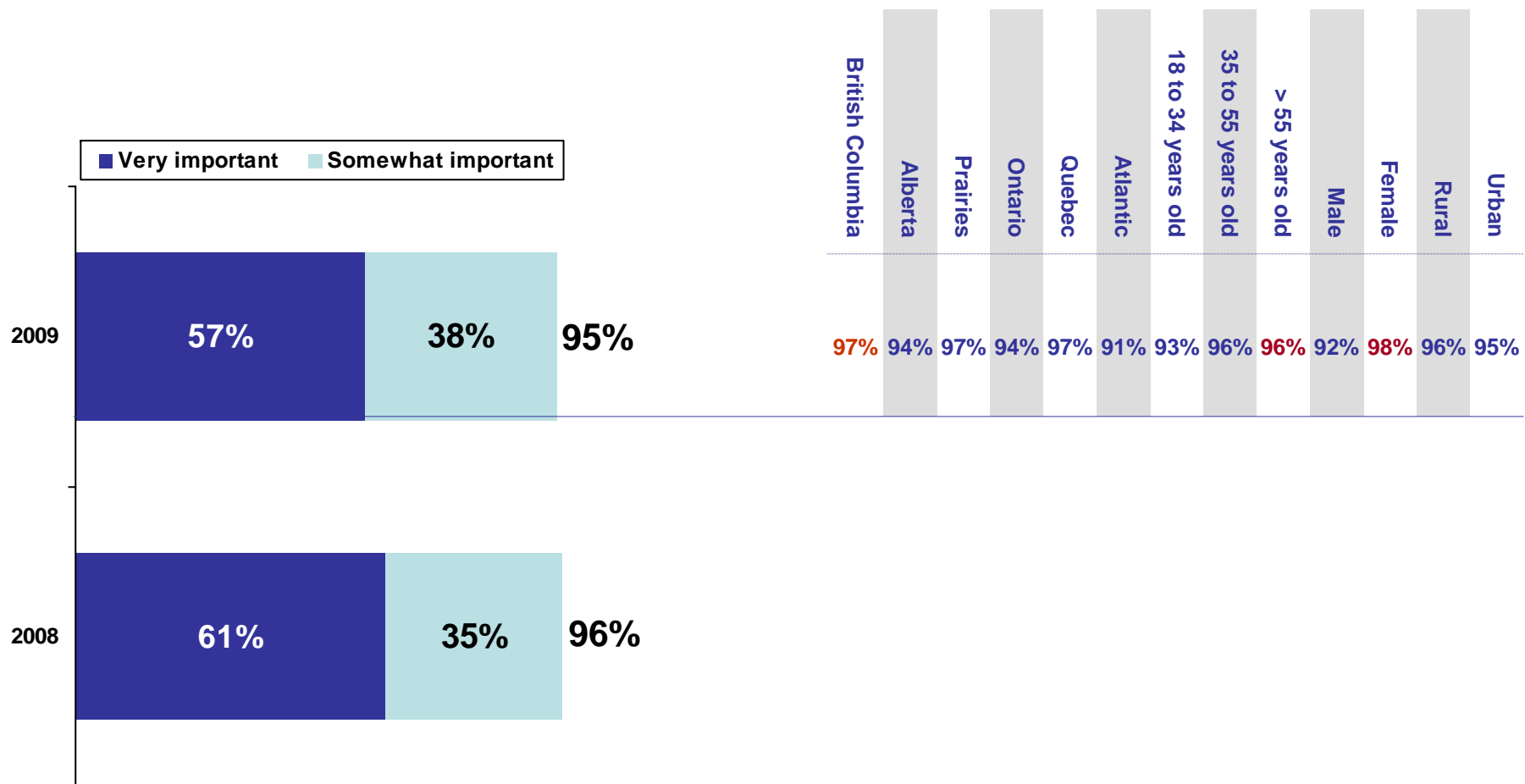
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Do you agree or disagree with following statements.
Base: All Respondents n = 2165

Conservation... cont'd



- Most believe it is important to conserve freshwater on an ongoing basis.



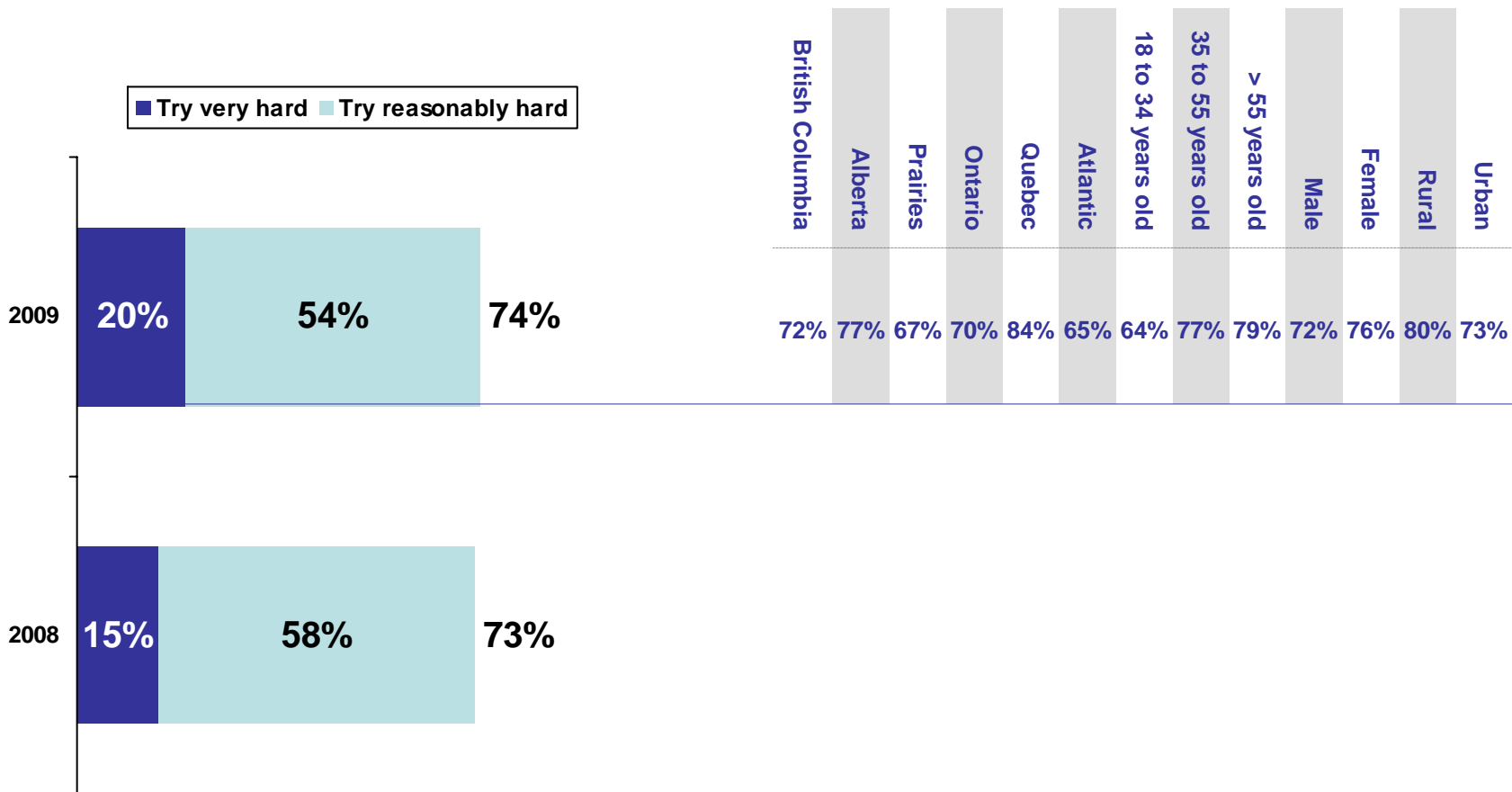
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Thinking about water conservation, how important is it to you, personally, to conserve freshwater on an ongoing basis?
 Base: All Respondents n = 2165

Conservation... cont'd



- Most believe they try at least reasonably hard to conserve water. Interestingly, younger Canadians are least likely to indicate that this is the case. Perhaps they feel they can do more. Quebecers are most likely to say they try hard to conserve water.



2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

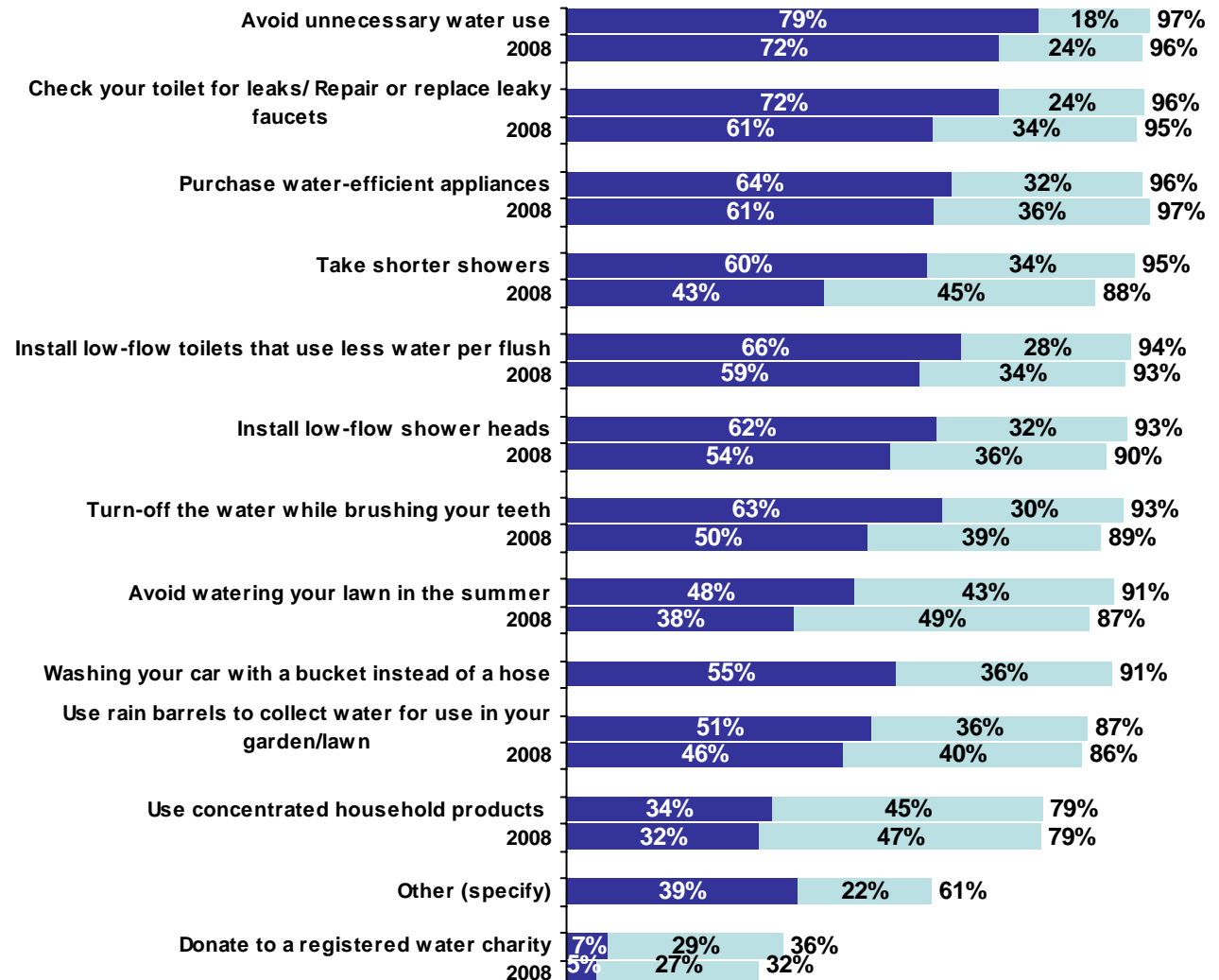
Question: To what extent do you, personally, try to conserve freshwater in the course of your daily activities involving water use?
 Base: All Respondents n = 2165

The Importance Of Conserving Through Various Activities



■ Very important ■ Somewhat important

- Importance/knowledge of simple methods to conserve water such as of avoiding unnecessary water use, correcting leaks, taking shorter showers, installing low-flow toilets, turning off water while brushing teeth, and avoiding watering lawn in summer have all increased over the past year.



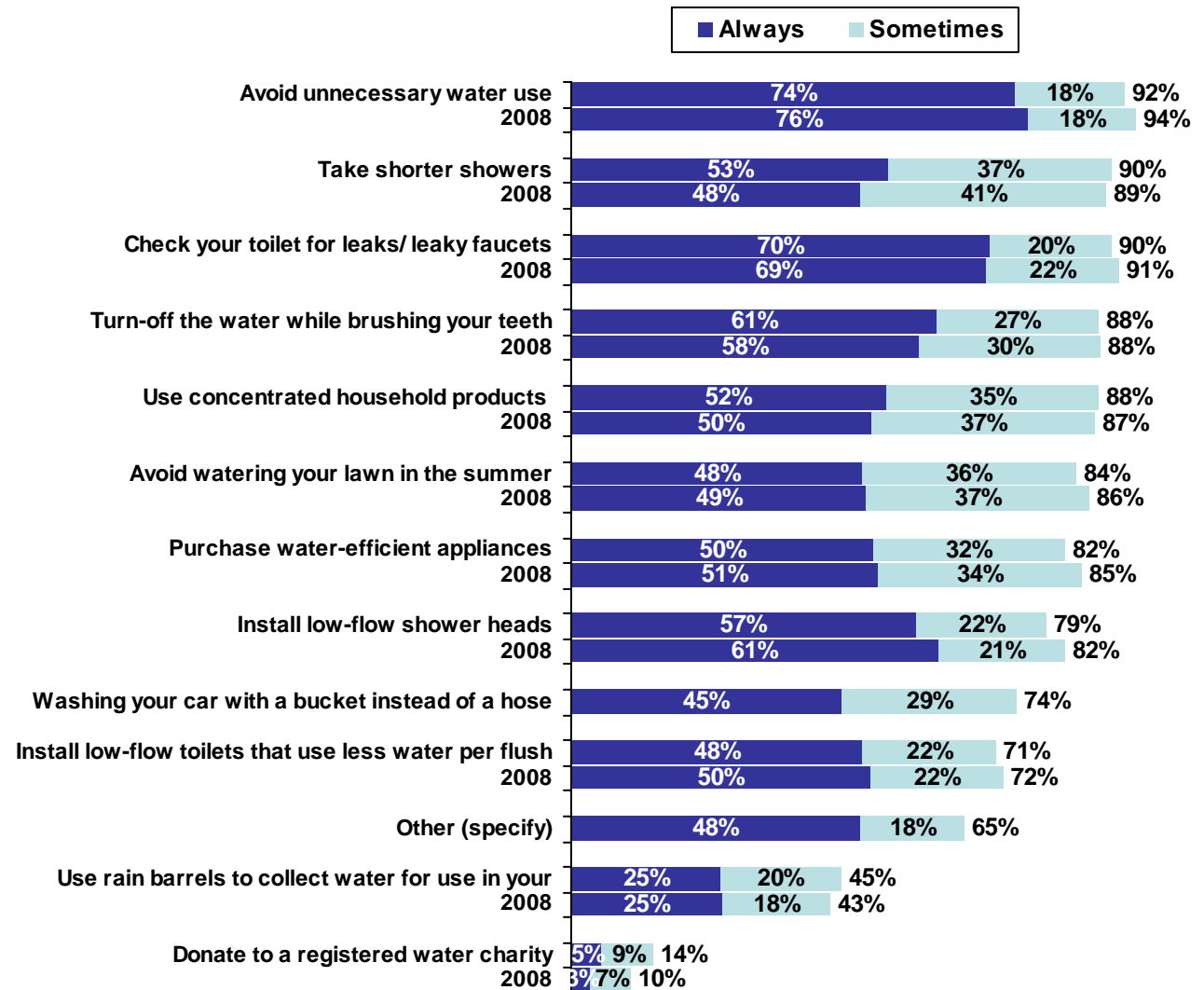
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: How important do you think each of these items is to conserving fresh water?
 Base: All Respondents 2009 n = 2165, 2008 n = 2309

Actions Speak Louder Than Words



- Conservation habits have not increased over the past year.
- There has been little change in the behaviours or actions of Canadians when it comes to conserving water.
- Still only half of Canadians take shorter showers or avoid watering their lawn in summer to conserve water.



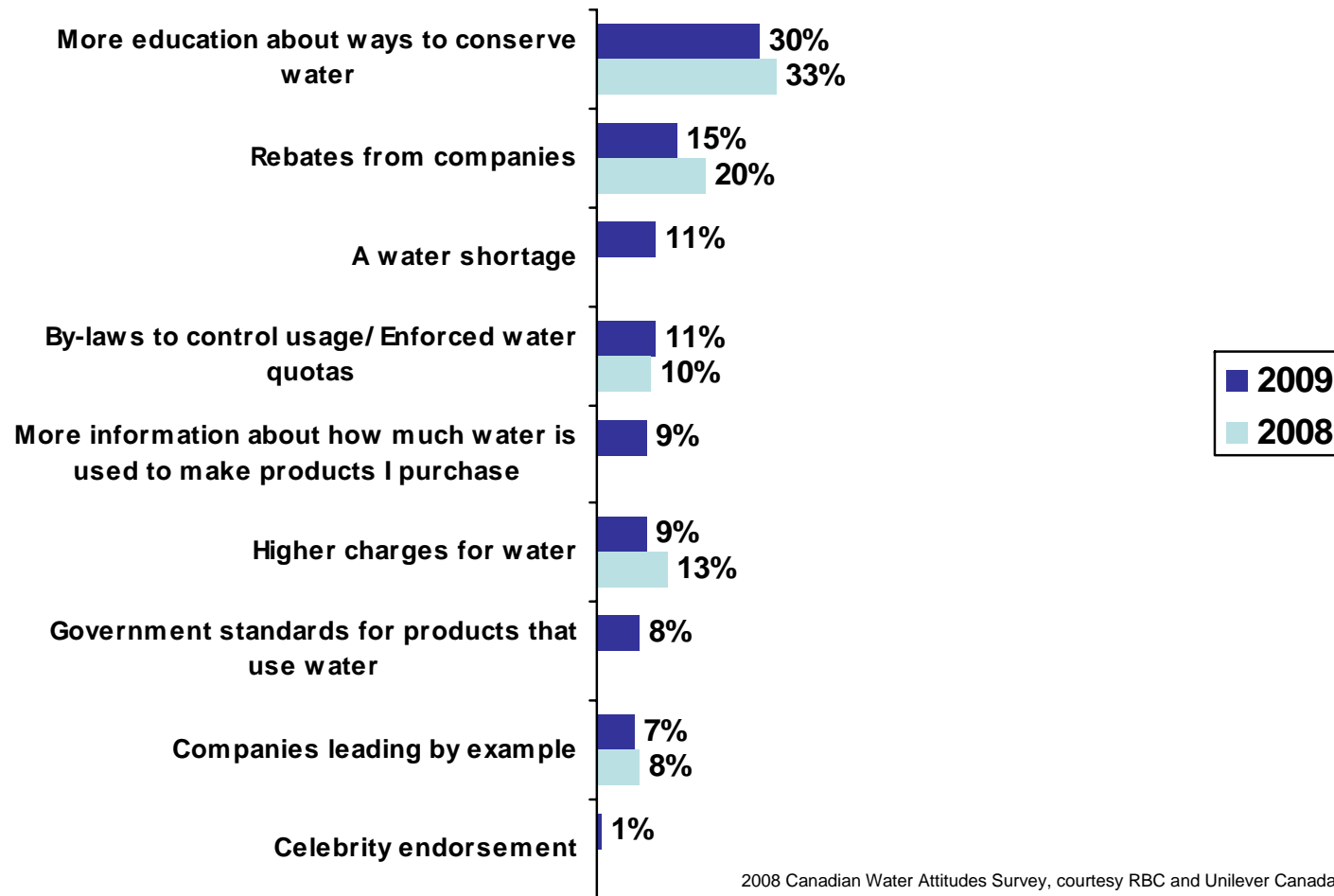
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

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

Encouraging Conservation



- More Canadians say that education, not necessarily rebates, would encourage them to conserve more fresh water. That said, one-quarter of Canadians feel rebates or higher water charges would be the most effective encouragement.

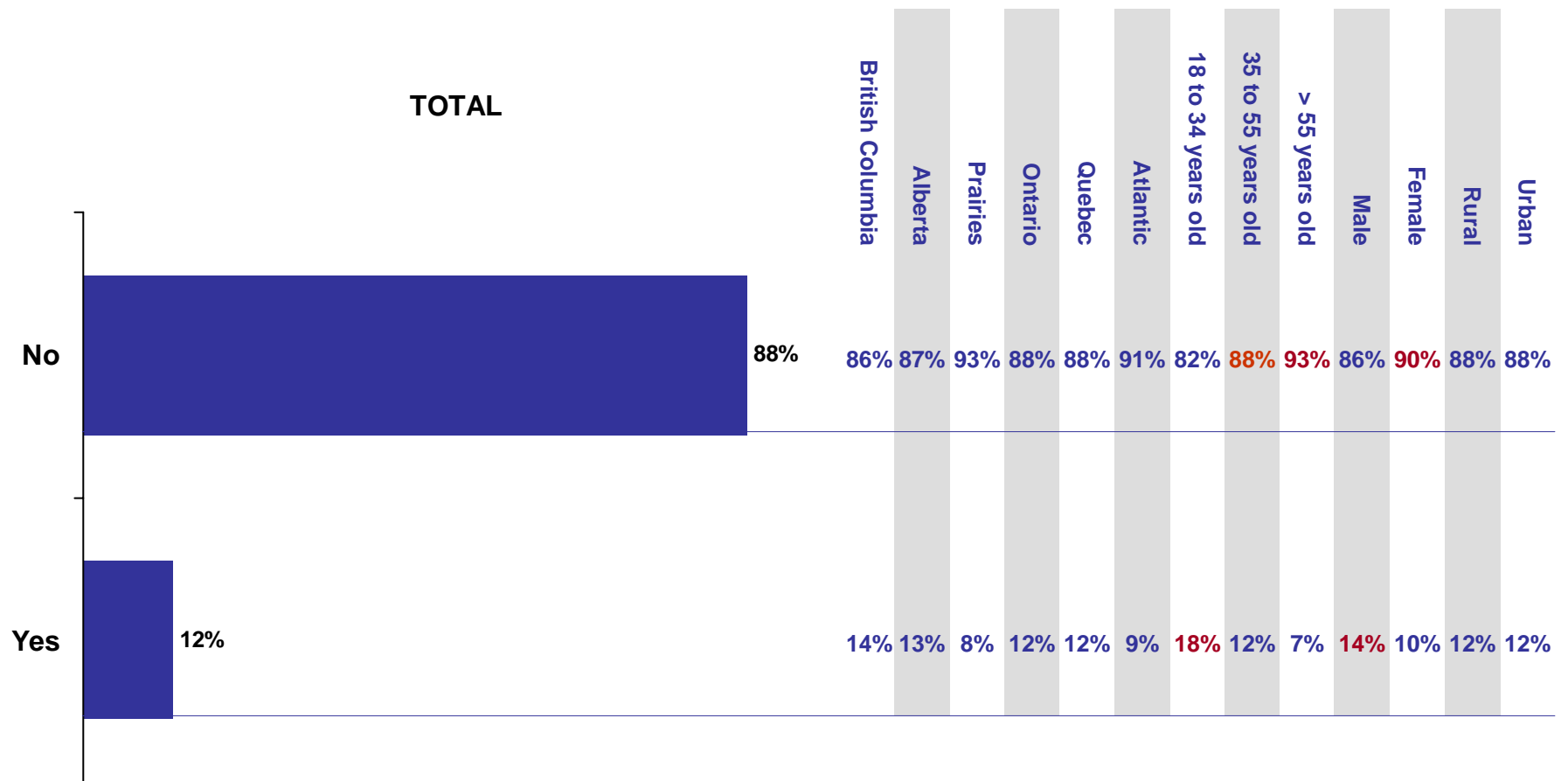


Question: Which of the following would be the most likely to encourage you to conserve more freshwater?
 Base: All Respondents 2009 n = 2165, 2008 n = 2309

Boycotts



- One in ten Canadians have stopped doing business with a corporation because they learned that company used water irresponsibly.



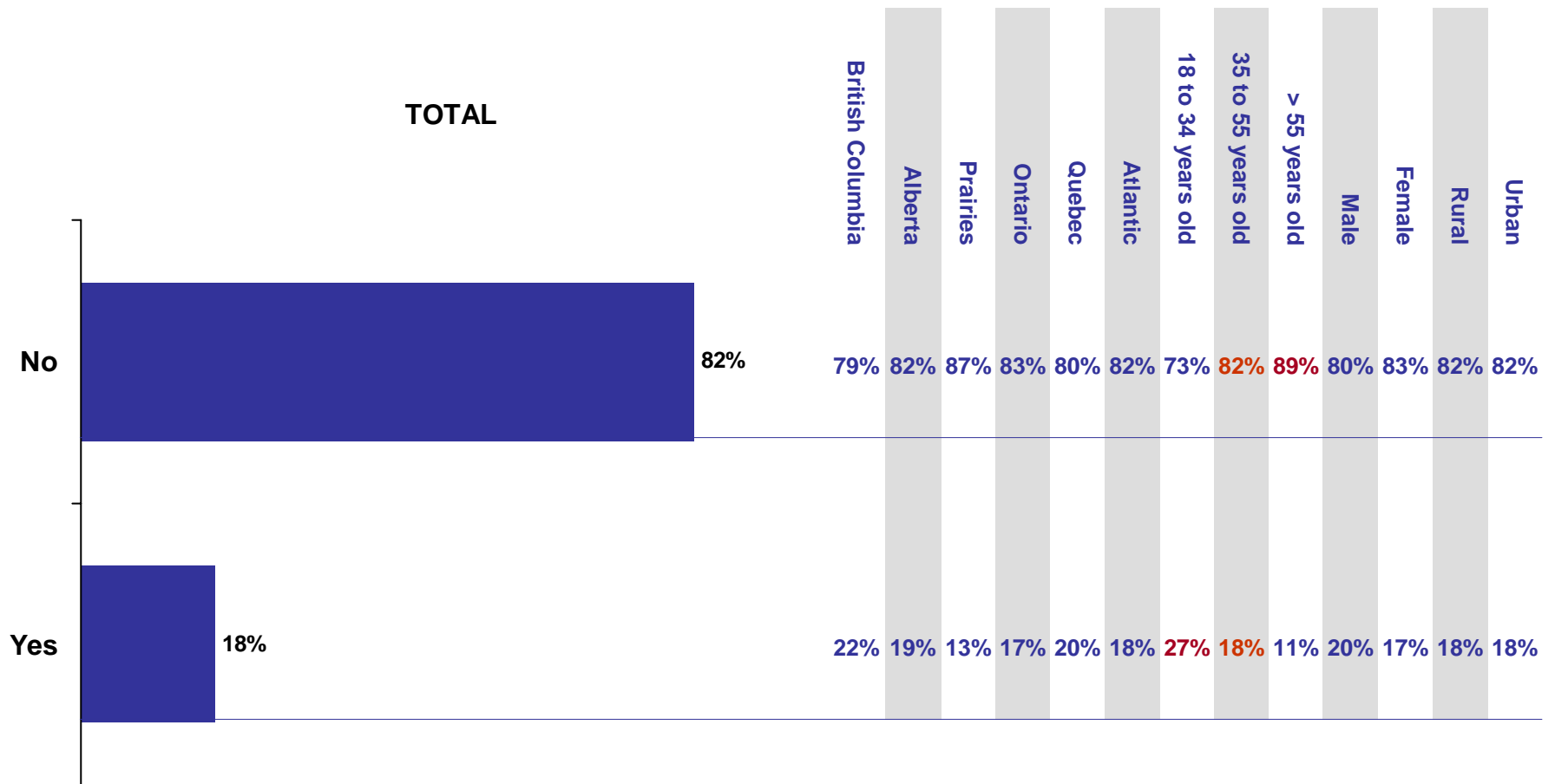
2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: Have you ever stopped doing business with a corporation because you learned that they used water in an irresponsible manner?
 Base: All Respondents n = 2165

Supporting Companies That Use Water Responsibly



- Two in ten say they've started doing business with a corporation that they learned used water responsibly.



2008 Canadian Water Attitudes Survey, courtesy RBC and Unilever Canada.

Question: 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 = 2165