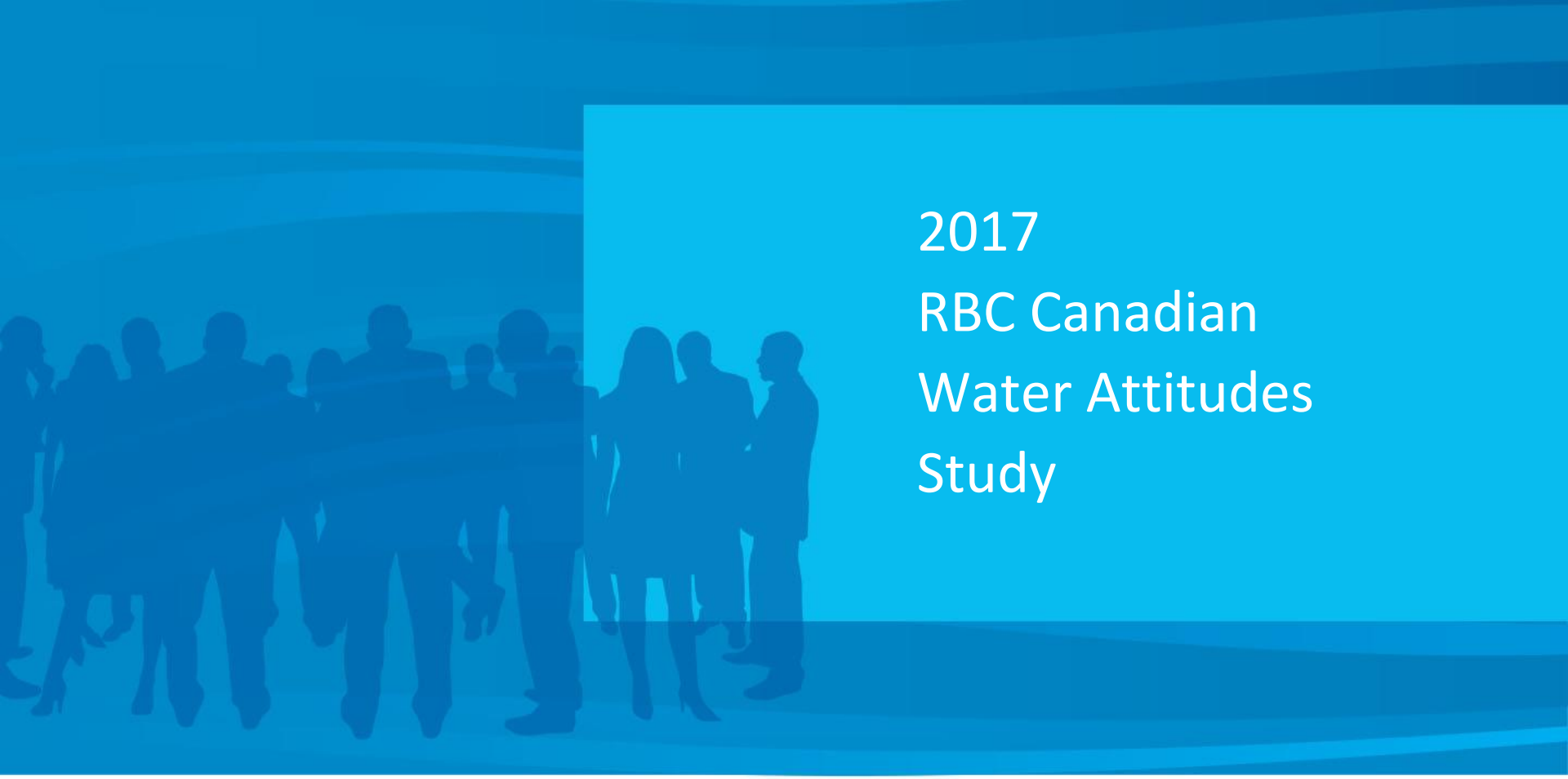
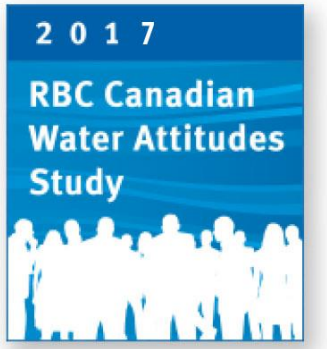
# 2017 RBC Canadian Water Attitudes Study






RBC Blue Water Project™

# Welcome to the complete findings of the 2017 RBC Canadian Water Attitudes Study

**A message from RBC**

In 2007, RBC launched the RBC Blue Water Project, a 10-year, $50 million charitable commitment to protect the world's fresh water. We soon learned that many Canadians take water for granted. So in 2008, we started polling them about their attitudes towards water—to see if the serious water issues around the world and emerging ones at home were having an impact on how we use and think about this precious resource, and if our grants were making a difference.

The story that's emerged is both complex and enlightening. On the one hand, it confirms how much we value our water and how integral Canada's lakes and rivers are to our national identity. On the other, it reveals a troubling carelessness with a resource we consider unlimited in its abundance.

What can we learn from these contradictions? One: that Canadians are still coming to terms with a water future that will look very different from our past. And two: that it's time to tell a more compelling story about the importance of water, not just to our environment, but to our economy, our identity and future prosperity.

As in past years, we are making the full results of this poll freely available, with the hope that our findings will help inform the work of NGOs, academics, governments and other interested parties. You are welcome to refer to, reprint or redistribute this information. We only we ask that you attribute the source as the "2017 RBC Canadian Water Attitudes Study."

Please visit rbc.com/bluewater for an archive of the RBC Canadian Water Attitudes Study results since 2008.

Andrew Craig
Director, Corporate Environmental Affairs
RBC

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# Key Findings (1)

- Economic issues and healthcare are viewed among the most important, most concerning, and most serious issues by Canadians, while water issues rate relatively lower. Despite this, over half of Canadians say that the quality of water in lakes, rivers, and streams, extreme weather causing droughts or flooding, and the long-term supply of fresh water and quality of drinking water have become at least somewhat more serious issues compared to ten years ago.
- Canadians continue to view fresh water as Canada's most important natural resource by far (45%), although this is down from 49% in 2016. Nearly a quarter of Canadians perceive oil and gas to be the most important natural resource, up slightly in 2017. Only in Alberta do perceptions of oil and gas (57%), as Canada's most important resource, surpass fresh water (27%).
- While a majority of Canadians (60%) say an abundant fresh water supply is "very important" to Canada's national economy, this is down from 70 percent in 2008. This ten-point gap is significant and suggests a need for better advocacy and communications on the importance of fresh water in the Canadian economy.
- Eight in ten Canadians are at least somewhat confident that Canada, as well as the regions they live in, have enough fresh water to meet long-term needs, similar to the confidence levels ten years ago; however, only about a quarter are very confident in Canada's fresh water supply, despite nearly over half strongly agreeing that Canada has more fresh water than most other places in the world (53%).
- Canadians may be feeling more vulnerable as more "strongly agree" that parts of Canada are at risk of a fresh water quality problem (30%) and supply shortages (25%) than in 2009.
- More than half of Canadians "strongly agree" that water is an important part of Canada's national identity. Canada's fresh water in lakes, rivers, and streams emotes feelings of being fortunate and proud, while very few feel indifferent about water. A small segment say they feel passionate or inspired, suggesting there are opportunities to more strongly engage people and connect water to the Canadian identity.

# Key Findings (2)

- Climate change and global warming has risen to become the top perceived threat to Canada's fresh water supply, with one in five Canadians saying this in 2017 compared to one in ten in 2008. Illegal dumping of toxins and mass exports of fresh water remain among the top three most-mentioned perceived threats after ten years of tracking. Canadians under 35 (36%) are more likely to perceive climate change as being among the biggest threats to water than Canadians over 55 years of age (25%).
- Similar to 2008, about seven in ten believe that climate change will have a negative impact on Canada's supply and quality of fresh water (67%); this is highest in Quebec (77%) and lowest in Alberta (49%). One-quarter of respondents think climate change will have no impact.
- Canadians are split on whether they have an adequate understanding of the impact of climate change on water availability and quality, with 45 percent disagreeing and 42 percent saying that they somewhat agree.
- In terms of extreme weather events, droughts and floods have seen marked increases in the perception that they will likely occur, and worry about these events has also increased since 2016 (over 20 percentage points for droughts and 15 percentage points for floods). However, preparedness for these events has remained stable.
- In 2017, more Canadians say that forest fires (53%, up 19 points), heat waves (52%, up 6 points), and droughts (36%, up 12 points) are happening more often compared to ten years ago than they did in 2014.
- When thinking of the increasing frequency and severity of extreme weather events, water pollution is the top concern (47%), especially in the province of Quebec (60%). The concern about forest fires (37%) as a consequence of extreme weather has more than doubled since 2012, and is especially high in Alberta (49%) and British Columbia (44%).
- In general, Canadians feel that water issues and infrastructure needs such as protecting drinking water sources, deteriorating sewage and water distribution infrastructure, and the increasing consumption of water supplies will become more urgent for urban communities and municipalities in ten years' time, among other issues. Very few say these issues will become less urgent, suggesting a lack of optimism in the ability to manage these issues.

# Key Findings (3)

- Nine in ten Canadians are “very” or “somewhat” confident about the safety and quality of the water in their homes. More Canadians say they are “very” confident (42%) than in 2009 (32%). However, three in ten Canadians (and around four in ten in the Prairies and Quebec) have experienced living in an area under a boil water advisory.
- Eight in ten (79%) are “very” and “somewhat” concerned about water conditions on First Nations reserves. This is slightly lower than in 2016 (83%).
- Three-quarters of Canadians would be more motivated to support organizations that address the issue of safe drinking water on First Nations reserves in Canada than safe drinking water during humanitarian crises abroad, such as floods and earthquakes. Younger respondents (18-34 years old) are more motivated to support humanitarian crises abroad (34%).
- Over half of Canadians think the federal government should be held most responsible for working to improve the quality of water on First Nations reserves in Canada, followed by the Assembly of First Nations (18%).
- Almost all Canadians (93%) “Strongly agree” (59%) and “Somewhat agree” (34%) that access to water is a human right.
- Canadians say the infrastructure areas that should be the highest priorities for government funding are hospitals (49%), the drinking water supply (31%), and the production of green energy (24%), although these ratings have declined compared to previous years. Canadians’ perceptions of the level of priority for funding of sewage collection and treatment and storm water management have remained stable.
- Over a third of Canadians say they have no idea what condition their storm water management or water treatment and delivery systems are in. About half (49%) believe the storm water systems are in good condition (higher than in previous years) and 40 percent believe their water treatment and delivery systems are in good condition (down from 54% in 2016). Only about one in five feel both systems require immediate major investment, with both seeing increases since 2016.

# Key Findings (4)

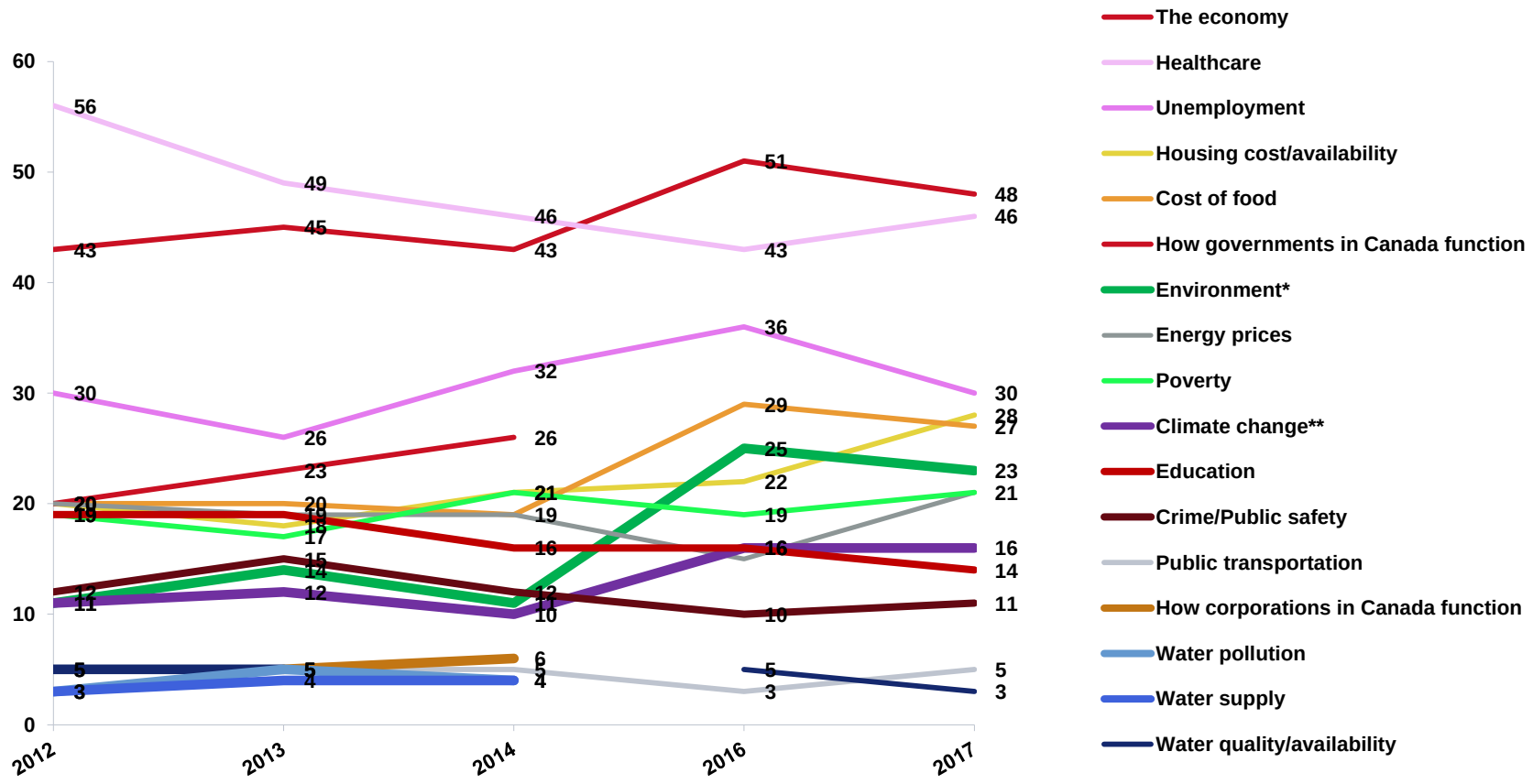
- Nearly half of Canadians “strongly agree” that commercial enterprises should pay the full cost of delivering and treating the water they use (49%) and obtain licenses for ground water use (48%), as well as the need for stricter rules and standards to manage water use by industries and municipalities (45%). This appears to suggest a stronger role for government in managing commercial use of water. Fewer Canadians agree with paying the full costs of water delivery, sewage, and treatment at the consumer level (20%) and paying more for water use at the household level (9%).
- When Canadians were asked to choose from a number of measures to encourage people to help ensure the safety of drinking water and/or wastewater disposal for their homes, for example, paying through a water bill or taxes or stricter rules on their property, no particular measures stand out from the others which suggests that these may be a challenge for policy makers to gain acceptance by consumers.
- Canadians feel they are individually making reasonable efforts (86%) to conserve fresh water, and to a greater extent than their fellow Canadians (66%), and even more than governments. The perception that governments are making reasonable efforts to protect the quality of fresh water has increased from 40 percent in 2010 to 60 percent in 2017.
- Fewer Canadians in 2017 agree that without good conversation habits, Canada will have a fresh water shortage in the future (77% in 2017, down from 84% in 2009).
- Although seven in ten agree that people will waste water if there is no price put on it, about the same number say that the price of water is high enough to ensure it is treated as a valuable resource. Canadians are less likely to agree that people should pay for the water they use than in the past (61% in 2017, down from 77% in 2010).
- Over six in ten Canadians (64%) say they put effort into reducing both energy and water consumption equally, while 26 percent say they put more effort into saving energy and only 6 percent say they put more effort into saving water. Of those who say they put more effort into saving water, the primary motivation is to better protect the environment (71%), whereas people who say they put more effort into saving energy say they do so to save money (79%). This suggests that increasing the price of water could encourage better conservation habits.

# General Context

2017 RBC Canadian Water Attitudes Study

# Water issues have remained low in importance for Canadians since 2012 when compared to other issues

## Three Most Important Issues Facing Canada, Total Mentions, 2012–2017




Base: All respondents 2017 *n*=2,017; 2016 *n*=2,194, 2014 *n*=2,074, 2013 *n*=2,282, 2012 *n*=2,428
*Overall quality of the environment in 2012, 2013 and 2014
**The impact of climate change in 2012, 2013 and 2014
Q. What do you think are the three most important issues facing Canada?

# Three Most Important Issues Facing Canada, Total Mentions, Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| The environment | 31 | 14 | 22 | 20 | 28 | 25 | 34 | 14 | 25 | 20 | 32 | 25 | 31 | 21 | 20 | 23 | 23 | 22 | 25 | 26 |
| Unemployment | 23 | 59 | 34 | 29 | 20 | 39 | 20 | 61 | 27 | 29 | 23 | 29 | 32 | 31 | 29 | 31 | 30 | 30 | 30 | 35 |
| The cost and/or availability of housing | 52 | 24 | 30 | 32 | 18 | 17 | 55 | 26 | 30 | 37 | 19 | 21 | 36 | 29 | 22 | 27 | 30 | 32 | 22 | 23 |
| Crime and public safety | 15 | 11 | 22 | 12 | 6 | 9 | 15 | 11 | 23 | 13 | 8 | 12 | 11 | 10 | 12 | 11 | 11 | 12 | 9 | 10 |
| Education | 12 | 8 | 12 | 9 | 25 | 20 | 12 | 8 | 13 | 11 | 23 | 25 | 19 | 14 | 10 | 13 | 15 | 13 | 18 | 13 |
| The economy | 42 | 70 | 50 | 47 | 44 | 45 | 41 | 70 | 46 | 47 | 45 | 46 | 45 | 49 | 51 | 54 | 43 | 50 | 45 | 43 |
| Healthcare | 39 | 33 | 49 | 39 | 63 | 49 | 38 | 36 | 48 | 41 | 59 | 44 | 36 | 45 | 54 | 42 | 50 | 45 | 48 | 49 |
| Energy prices | 12 | 24 | 13 | 34 | 10 | 14 | 11 | 22 | 11 | 27 | 10 | 14 | 16 | 24 | 23 | 23 | 20 | 20 | 28 | 16 |
| Public transportation | 4 | 3 | 2 | 9 | 4 | 1 | 6 | 3 | 3 | 12 | 4 | 2 | 8 | 4 | 5 | 6 | 4 | 7 | 5 | 0 |
| Water quality and/or availability | 6 | 1 | 5 | 3 | 2 | 3 | 3 | 1 | 5 | 3 | 2 | 6 | 3 | 3 | 4 | 3 | 3 | 3 | 3 | 4 |
| Poverty | 21 | 13 | 19 | 19 | 30 | 22 | 22 | 13 | 21 | 17 | 24 | 19 | 17 | 22 | 24 | 20 | 23 | 20 | 18 | 31 |
| The cost of food | 21 | 25 | 22 | 29 | 26 | 34 | 20 | 21 | 21 | 24 | 27 | 33 | 24 | 29 | 26 | 26 | 28 | 26 | 28 | 28 |
| Climate change | 17 | 9 | 12 | 15 | 20 | 19 | 17 | 7 | 17 | 16 | 20 | 20 | 19 | 14 | 15 | 15 | 16 | 15 | 17 | 15 |

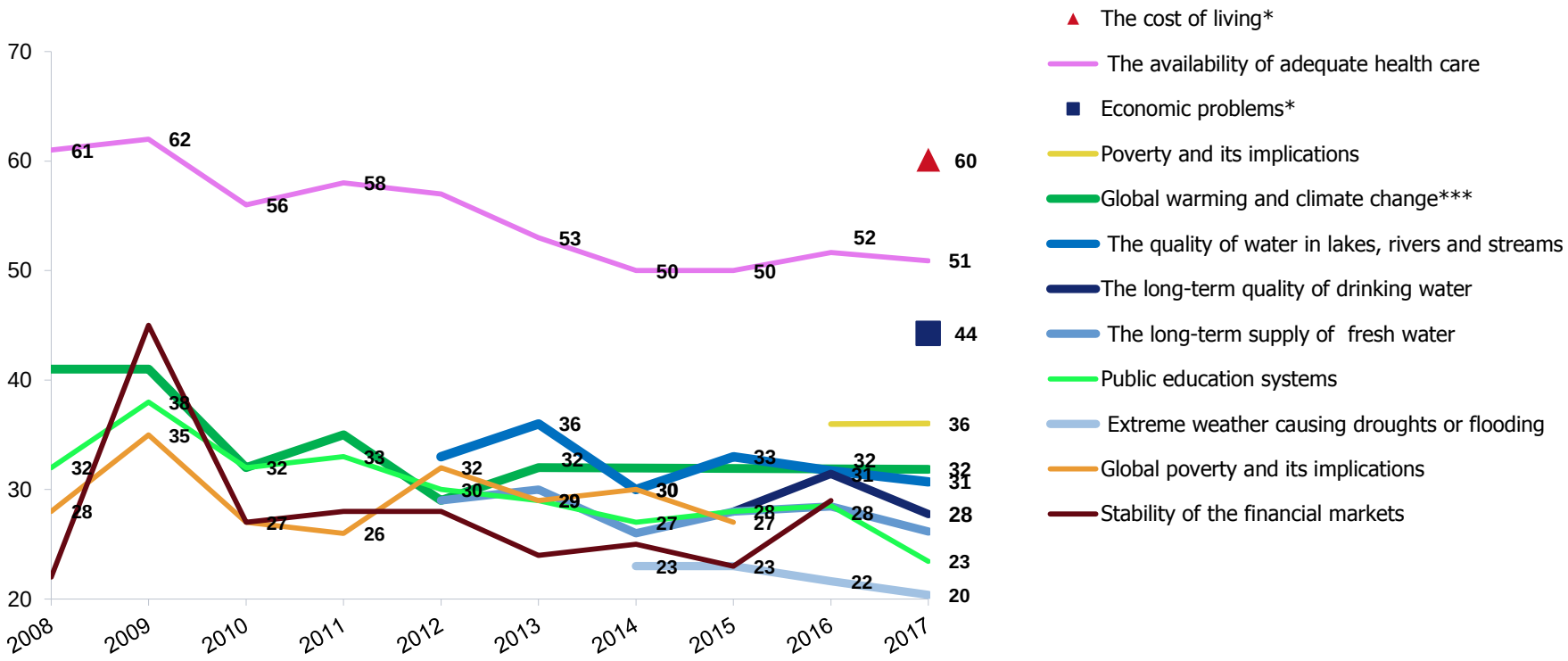


Base: All respondents 2017 *n*=2,017

Q. What do you think are the three most important issues facing Canada?

# Concern about water issues remains low compared to cost of living and healthcare

## Degree of Concern about Issues Facing Canada, "Very Concerned," 2008–2017




Quality and long-term supply of water are not among the highest concerns of Canadians and this has remained stable in the past few years.

Base: All respondents 2017 *n*=2,017; 2016 *n*=2,194; 2015 *n*=2,242; 2014 *n*=2,074; 2013 *n*=2,282; 2012 *n*=2,428; 2011 *n*=2066; 2010 *n*=2,022; 2009 *n*=2,165; 2008 *n*=2,309

*New in 2017: "The cost of living" and "Economic problems"

***not asked from 2014 to 2016

Q. 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.

# Degree of Concern about Issues Facing Canada
# "Very Concerned" and "Somewhat Concerned," Demographics, 2017

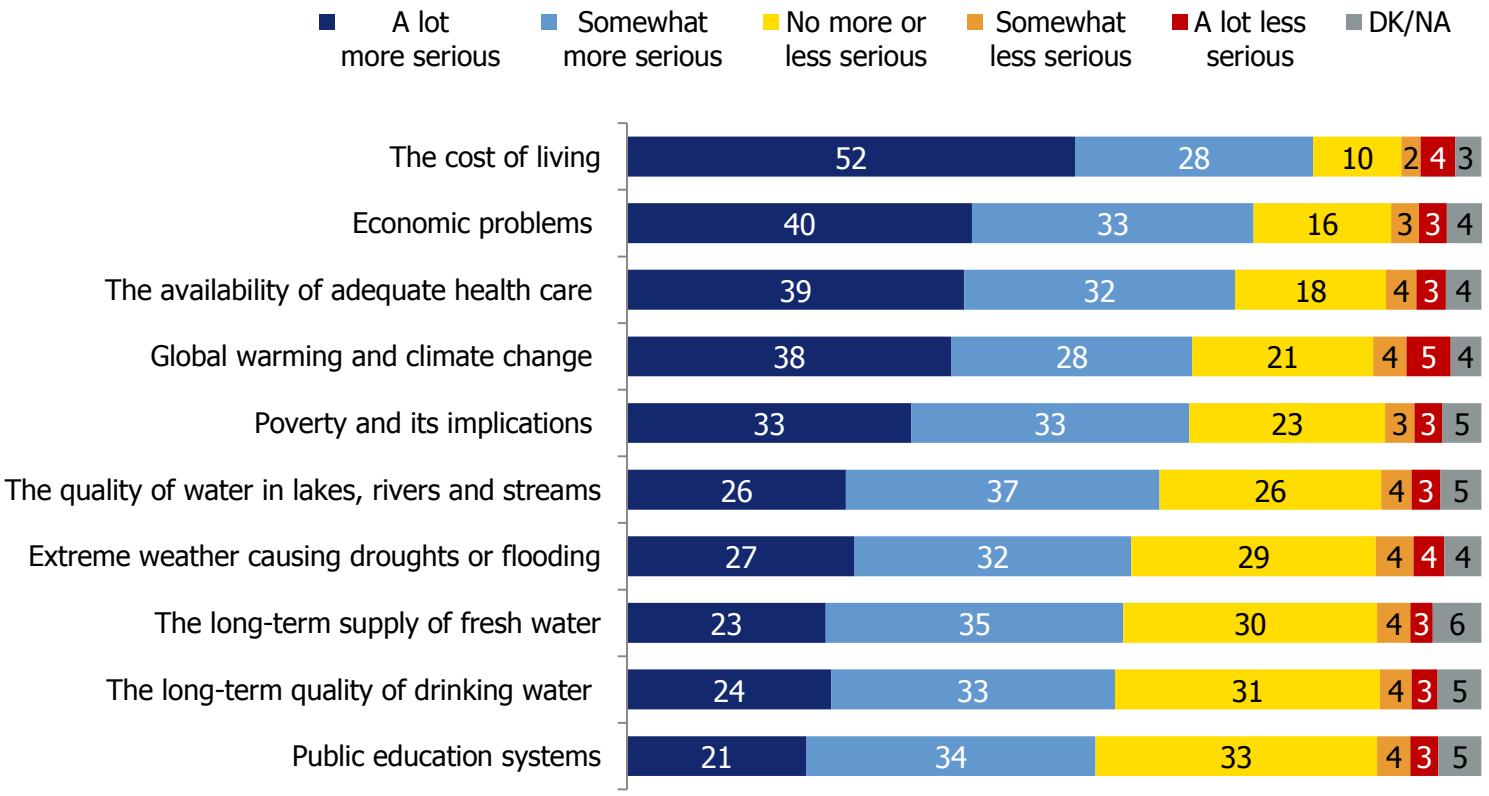
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18 to 34 years | 35 to 55 years | >55 years | Male | Female | Urban (>100 000) | Mid-size towns/cities | Rural (<1000) |
| Availability of adequate health care | 89 | 84 | 84 | 85 | 93 | 93 | 85 | 85 | 86 | 85 | 94 | 92 | 82 | 88 | 92 | 85 | 90 | 87 | 89 | 92 |
| Global warming and climate change | 71 | 50 | 64 | 70 | 78 | 77 | 73 | 52 | 73 | 73 | 81 | 79 | 73 | 72 | 66 | 67 | 73 | 72 | 70 | 64 |
| Public education systems | 72 | 62 | 66 | 66 | 73 | 74 | 69 | 62 | 72 | 64 | 72 | 78 | 72 | 68 | 67 | 66 | 71 | 68 | 72 | 67 |
| Long-term supply of fresh water | 67 | 59 | 66 | 72 | 68 | 75 | 62 | 59 | 71 | 72 | 68 | 68 | 67 | 69 | 70 | 65 | 72 | 68 | 69 | 74 |
| Poverty and its implications | 86 | 78 | 85 | 83 | 86 | 86 | 84 | 78 | 81 | 83 | 82 | 83 | 81 | 83 | 87 | 79 | 88 | 83 | 82 | 90 |
| Economic problems | 88 | 95 | 90 | 90 | 86 | 90 | 85 | 97 | 92 | 91 | 85 | 87 | 87 | 89 | 91 | 89 | 90 | 90 | 86 | 89 |
| Quality of water in lakes, rivers and streams | 74 | 60 | 75 | 78 | 78 | 78 | 68 | 62 | 83 | 78 | 78 | 74 | 73 | 74 | 78 | 72 | 79 | 74 | 75 | 79 |
| Extreme weather causing droughts or flooding | 61 | 47 | 62 | 61 | 63 | 63 | 61 | 47 | 64 | 58 | 61 | 56 | 55 | 62 | 61 | 56 | 64 | 59 | 59 | 67 |
| Long-term quality of drinking water | 69 | 62 | 67 | 70 | 73 | 77 | 62 | 62 | 73 | 70 | 72 | 73 | 69 | 69 | 72 | 67 | 73 | 69 | 70 | 75 |
| The cost of living | 92 | 93 | 93 | 93 | 91 | 91 | 90 | 95 | 91 | 93 | 90 | 87 | 92 | 92 | 92 | 89 | 95 | 92 | 91 | 95 |

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

Q. 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.

# While Canadians say the cost of living has become a lot more serious compared to ten years ago, less than a quarter say this about the long-term supply of fresh water and quality of drinking water

## Seriousness of Issues Compared With Ten Years Ago, 2017




Seriousness of quality and supply of water compared with ten years ago is higher in the Atlantic region and more specifically in Halifax.



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

Q. (New 2017) Compared with ten years ago, do you think each of these issues has become…

# Seriousness of Issues Compared with Ten Years Ago
# "A Lot More Serious" and "Somewhat More Serious," Demographics, 2017

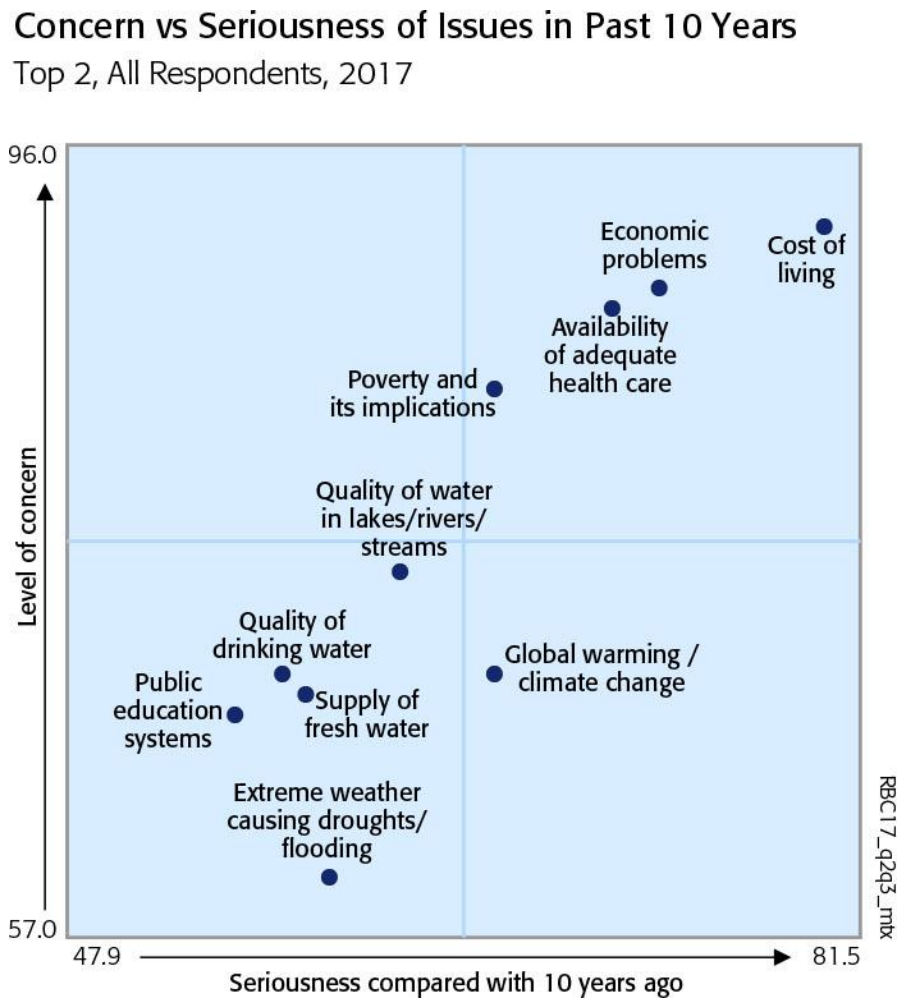
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18 to 34 years | 35 to 55 years | >55 years | Male | Female | Urban (>100 000) | Mid-size towns/cities | Rural (<1000) |
| Availability of adequate health care | 67 | 62 | 70 | 69 | 79 | 78 | 62 | 60 | 69 | 68 | 75 | 77 | 56 | 74 | 79 | 69 | 73 | 70 | 76 | 70 |
| Global warming and climate change | 68 | 47 | 62 | 65 | 73 | 76 | 69 | 49 | 71 | 67 | 71 | 78 | 64 | 68 | 66 | 63 | 70 | 67 | 66 | 63 |
| Public education systems | 54 | 46 | 56 | 50 | 62 | 64 | 57 | 44 | 53 | 50 | 57 | 62 | 50 | 56 | 57 | 53 | 57 | 55 | 57 | 52 |
| Long-term supply of fresh water | 52 | 49 | 59 | 58 | 62 | 70 | 45 | 49 | 57 | 59 | 58 | 68 | 54 | 57 | 62 | 54 | 62 | 56 | 61 | 61 |
| Poverty and its implications | 68 | 62 | 67 | 63 | 68 | 70 | 60 | 60 | 68 | 62 | 63 | 68 | 54 | 69 | 71 | 63 | 68 | 65 | 68 | 67 |
| Economic problems | 68 | 83 | 77 | 72 | 71 | 81 | 67 | 83 | 70 | 73 | 73 | 85 | 68 | 74 | 77 | 70 | 76 | 75 | 72 | 70 |
| Quality of water in lakes, rivers and streams | 57 | 51 | 63 | 61 | 68 | 74 | 50 | 47 | 66 | 60 | 63 | 71 | 57 | 62 | 67 | 59 | 65 | 61 | 65 | 64 |
| Extreme weather causing droughts or flooding | 58 | 48 | 57 | 57 | 66 | 69 | 57 | 51 | 59 | 56 | 64 | 65 | 48 | 63 | 63 | 56 | 61 | 59 | 57 | 59 |
| Long-term quality of drinking water | 55 | 44 | 58 | 55 | 63 | 69 | 50 | 44 | 60 | 55 | 58 | 64 | 51 | 60 | 59 | 54 | 60 | 56 | 60 | 56 |
| Cost of living | 83 | 80 | 82 | 80 | 77 | 87 | 82 | 80 | 77 | 76 | 74 | 87 | 72 | 82 | 84 | 77 | 83 | 80 | 84 | 77 |



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

Q. (New 2017) Compared with ten years ago, do you think each of these issues has become…

# Concern about a series of issues vs seriousness of those issues compared to ten years ago




- Economic issues and healthcare are viewed as the most concerning and serious issues by Canadians. Water issues are not as serious and not as concerning, in relative terms.
- Climate change is more serious compared to water issues but concern about it does not reflect that.
- Quality of water sources is a higher concern to Canadians compared to other water issues and climate change, reflecting the importance Canadians place on water resources.

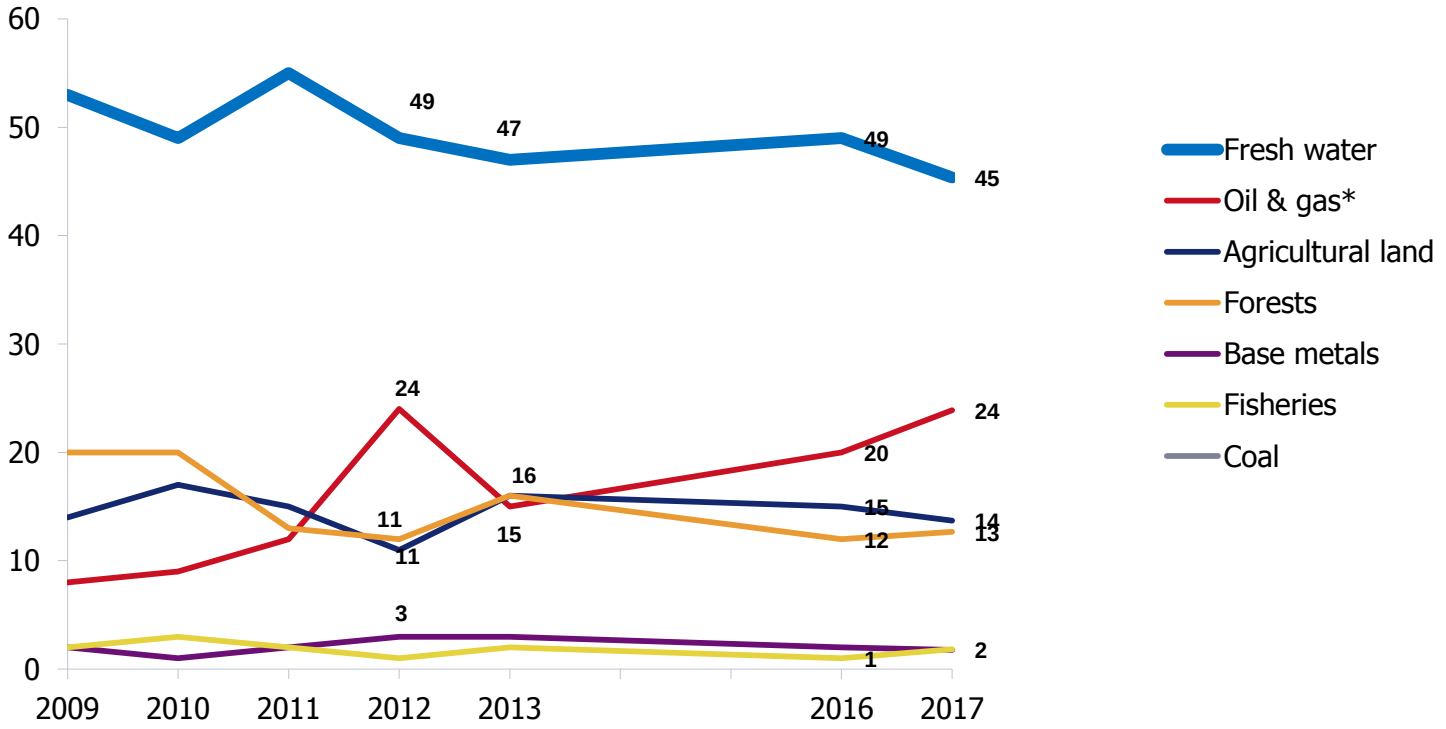
Base: All respondents 2017 *n*=2,017

Q. 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.

Q. (New 2017) Compared with ten years ago, do you think each of these issues has become…

# Canadians continue to consider fresh water to be Canada's most important natural resource

## Canada's Most Important Natural Resource, 2009–2017



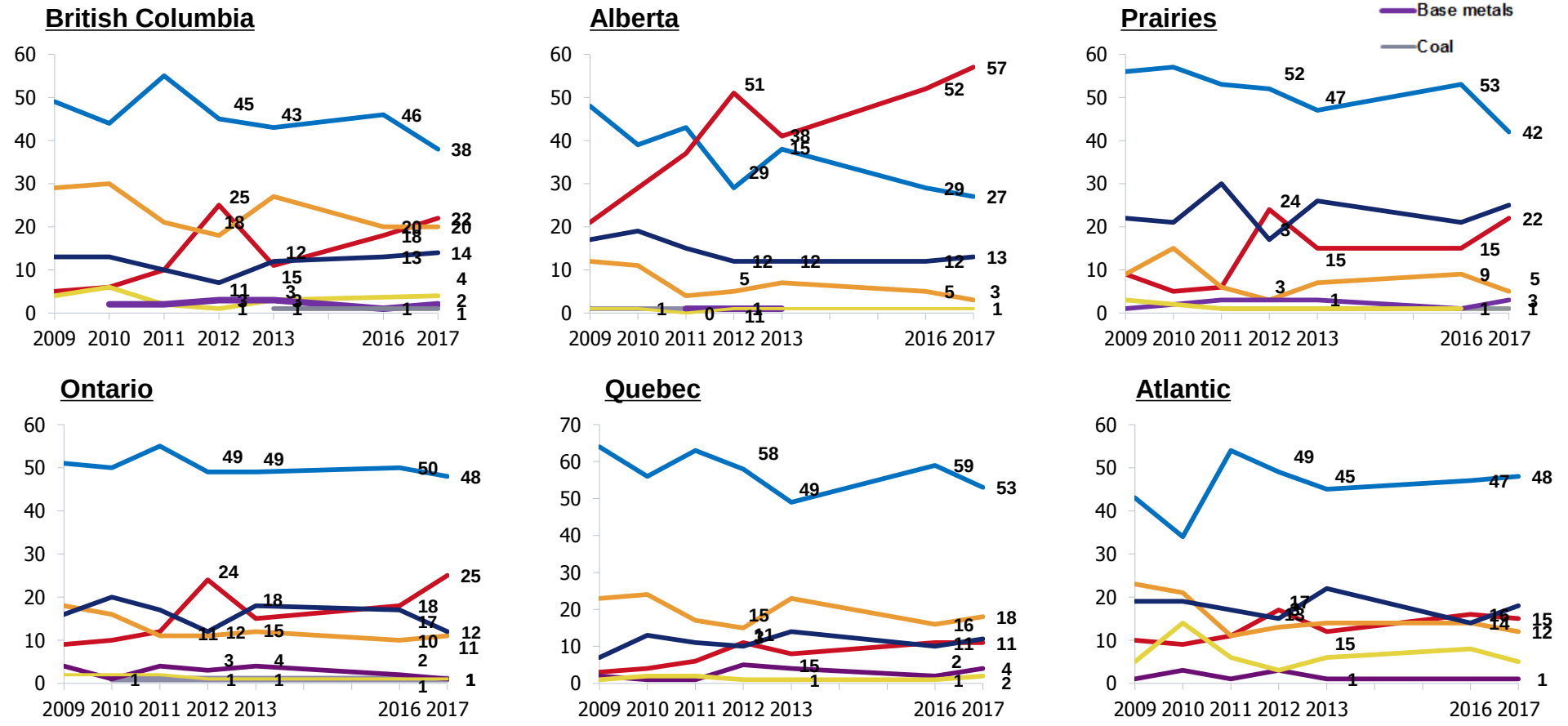

Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194, 2013 *n*=2,282, 2012 *n*=2,428, 2011 *n*=2,066, 2010 *n*=2,022, 2009 *n*=2,165

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

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

# Only in Alberta has the perception that water, as Canada's most important resource, been surpassed by oil and gas

## Canada's Most Important Natural Resource, by Region, 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

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



2017 RBC Canadian Water Attitudes Study

# Canada's Most Important Natural Resource, Demographics, 2017

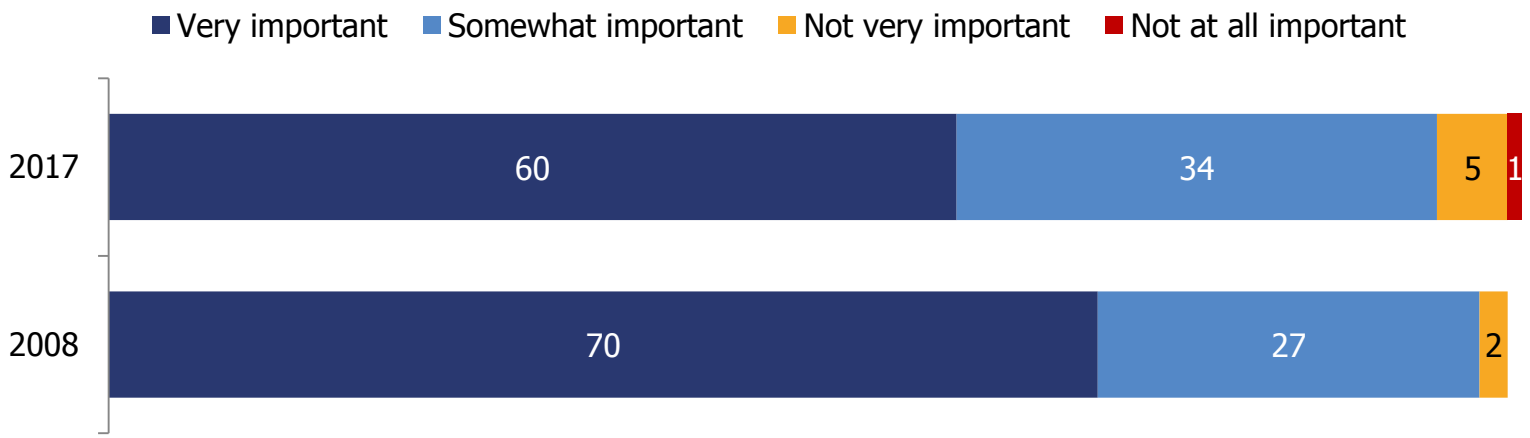
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18 to 34 years | 35 to 55 years | >55 years | Male | Female | Urban (>100 000) | Mid-size towns/cities | Rural (<1000) |
| Fresh water | 38 | 27 | 42 | 48 | 53 | 48 | 39 | 26 | 49 | 47 | 51 | 49 | 44 | 48 | 43 | 47 | 43 | 46 | 46 | 45 |
| Oil & gas | 22 | 57 | 22 | 25 | 11 | 15 | 22 | 56 | 21 | 28 | 15 | 20 | 24 | 23 | 25 | 25 | 22 | 26 | 20 | 19 |
| Forests | 20 | 3 | 5 | 11 | 18 | 12 | 20 | 3 | 7 | 11 | 17 | 11 | 14 | 13 | 12 | 11 | 14 | 12 | 16 | 10 |
| Coal | 1 | 0 | 1 | 1 | 0 | 0 | 1 | 0 | 1 | 2 | 0 | 1 | 2 | 1 | 0 | 1 | 1 | 1 | 1 | 0 |
| Agricultural land | 14 | 13 | 25 | 12 | 12 | 18 | 12 | 12 | 21 | 11 | 11 | 12 | 12 | 12 | 17 | 11 | 16 | 13 | 13 | 20 |
| Base metals | 2 | 0 | 3 | 1 | 4 | 1 | 2 | 0 | 0 | 1 | 3 | 0 | 3 | 1 | 2 | 2 | 1 | 1 | 2 | 4 |
| Fisheries | 4 | 1 | 0 | 1 | 2 | 5 | 4 | 1 | 1 | 0 | 2 | 8 | 2 | 2 | 2 | 2 | 2 | 1 | 2 | 2 |

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

Q. Which of the following do you consider to be Canada's most important natural resource? *Please select only one.*

# A majority of Canadians think that an abundant fresh water supply is “very important” to Canada’s national economy, but this has decreased since 2008

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



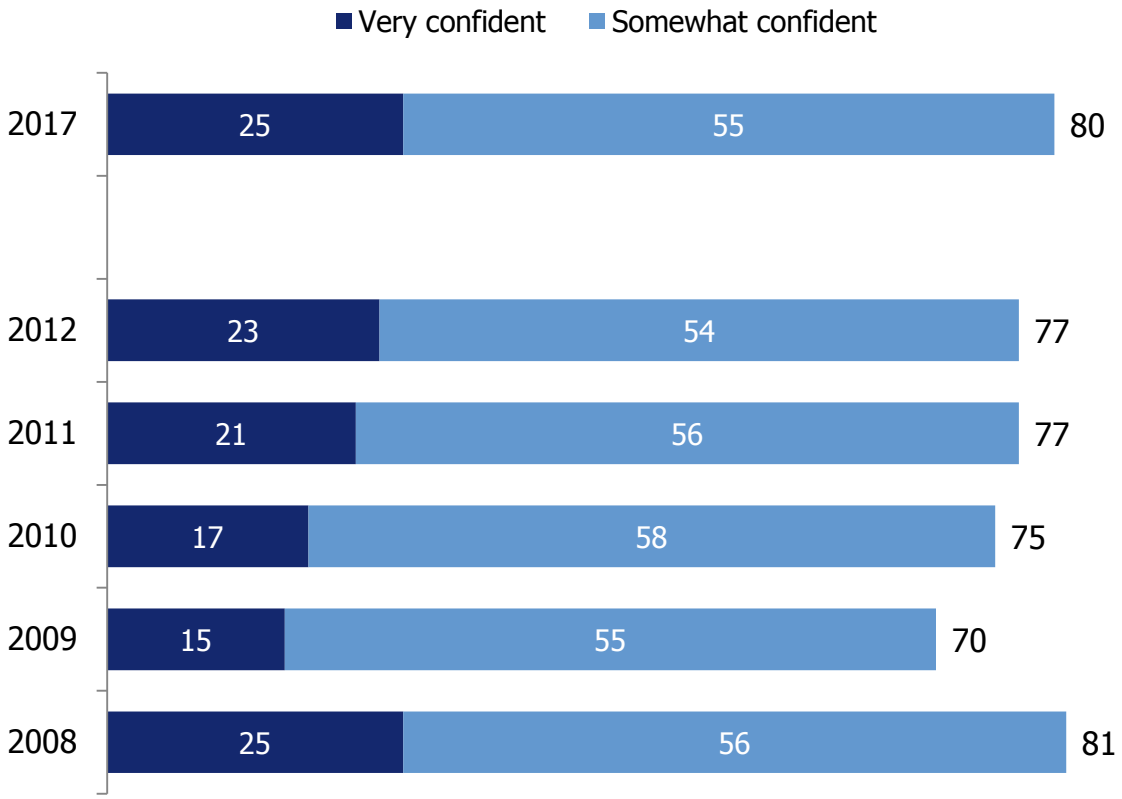

An abundant Canadian fresh water supply is especially important to residents of the Atlantic Region (75%).

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

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

# Canadians' confidence in the country having enough fresh water to meet long-term is nearly the same as in 2008; only one-quarter is "very confident"

## Level of Confidence that Canada has Enough Fresh Water to Meet Long-Term Needs "Very Confident" or "Somewhat Confident," 2008–2017

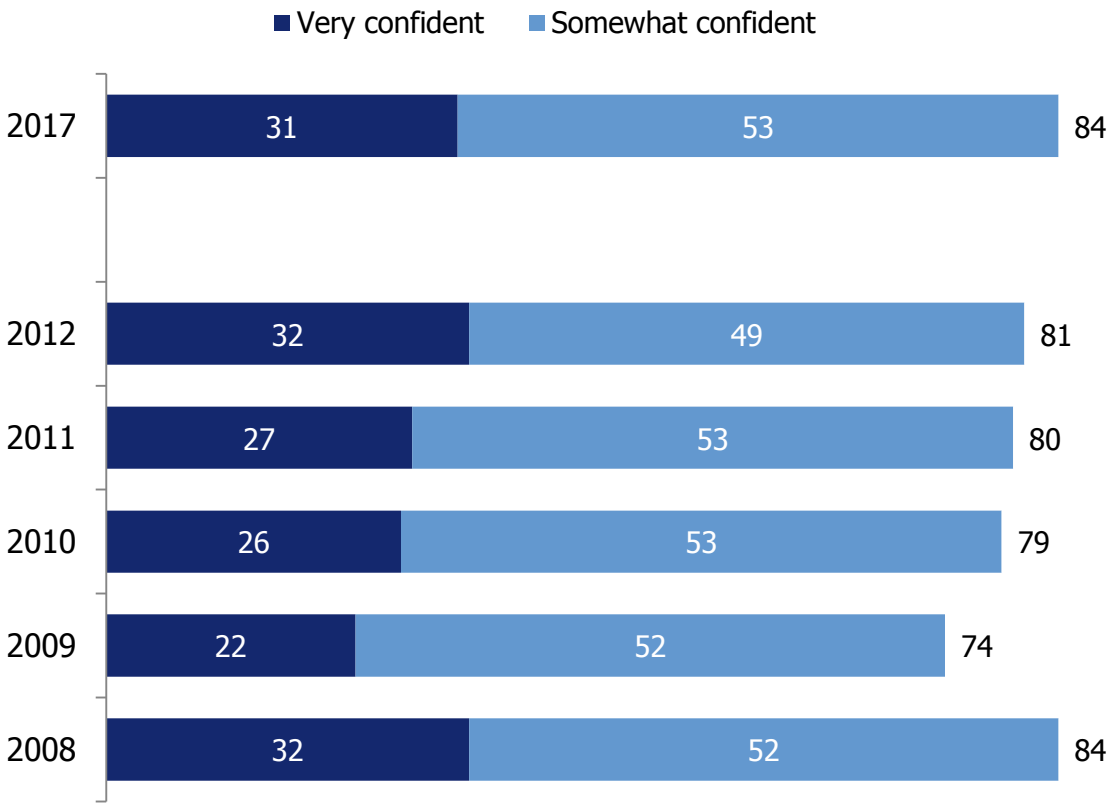



Base: All respondents 2017 *n*=2,017, 2012 *n*=2,428, 2011 *n*=2,066, 2010 *n*=2,022, 2009 *n*=2,165, 2008 *n*=2,309

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

# Canadians are slightly more likely to say they are confident that their regions have enough fresh water to meet long-term needs than the country overall

## Level of Confidence that Region has Enough Fresh Water to Meet Long-Term needs, "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

Q. And focusing specifically on your region of Canada, how confident are you that your region has enough fresh water to meet its long-term needs?

# Level of Confidence that Canada and Region have Enough Fresh Water to Meet Long-Term Needs, "Very Confident" or "Somewhat Confident," Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **Canada has Enough Water** | | | | | | | | | | | | | | | | | | | | |
| Very confident | 25 | 30 | 27 | 25 | 25 | 22 | 27 | 31 | 27 | 25 | 31 | 31 | 25 | 25 | 26 | 31 | 20 | 26 | 26 | 21 |
| Somewhat confident | 56 | 53 | 51 | 57 | 52 | 57 | 56 | 51 | 49 | 57 | 53 | 54 | 51 | 54 | 58 | 53 | 56 | 57 | 51 | 50 |
| **Region has Enough Water** | | | | | | | | | | | | | | | | | | | | |
| Very confident | 32 | 32 | 36 | 29 | 32 | 31 | 33 | 32 | 32 | 27 | 37 | 35 | 31 | 29 | 34 | 36 | 26 | 31 | 31 | 32 |
| Somewhat confident | 56 | 52 | 44 | 53 | 53 | 51 | 57 | 51 | 46 | 55 | 48 | 50 | 50 | 54 | 53 | 51 | 54 | 55 | 48 | 48 |

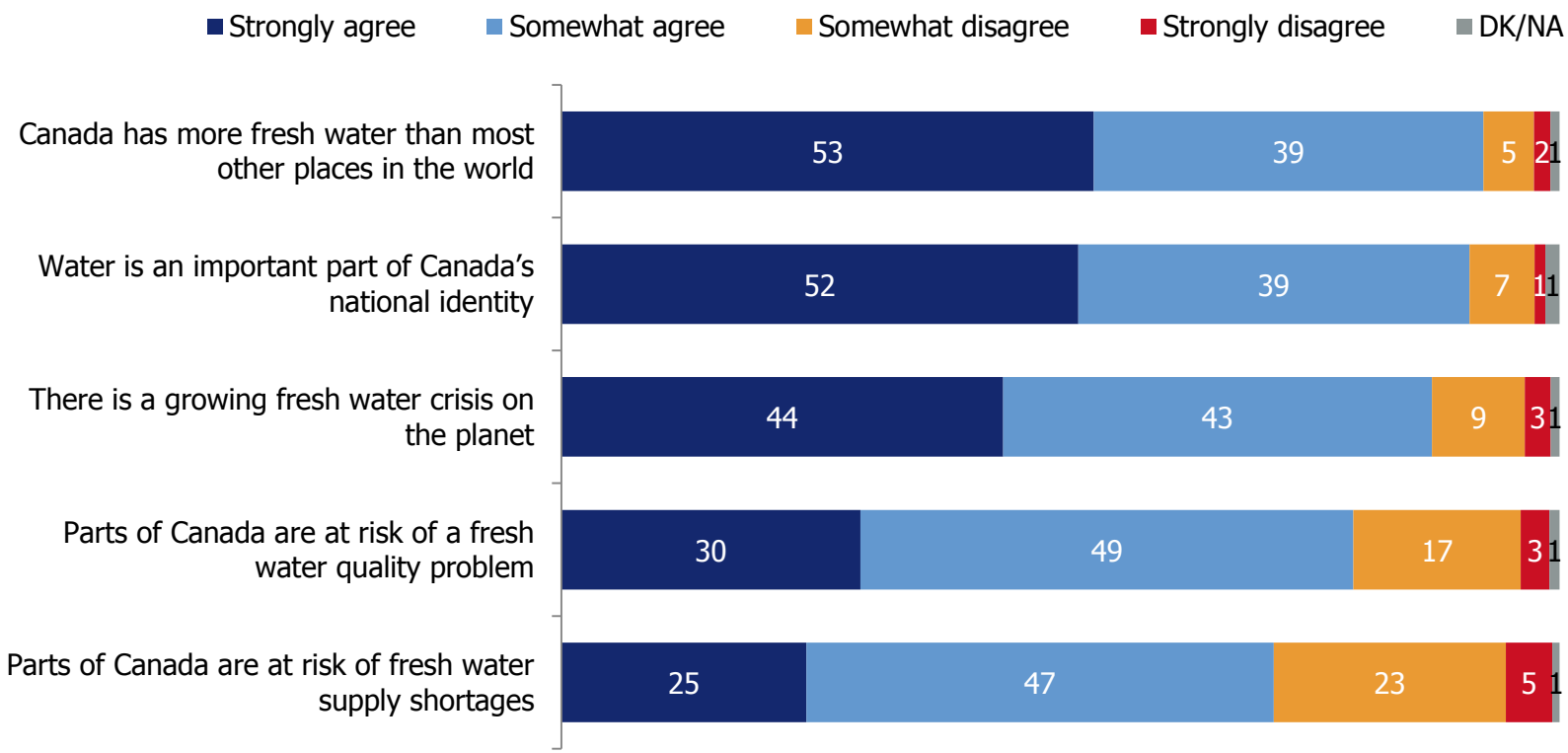
Base: All respondents 2017 *n*=2,017

Q. How confident are you that Canada as a whole has enough fresh water to meet our long-term needs

Q. And focusing specifically on your region of Canada, how confident are you that your region has enough fresh water to meet its long-term needs?

# Most agree that Canada has more fresh water than other places in the world and that there is a growing fresh water crisis on the planet. Canadians feel that water is an important part Canada's national identity

## Perceptions of Canada's Fresh Water, 2017




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

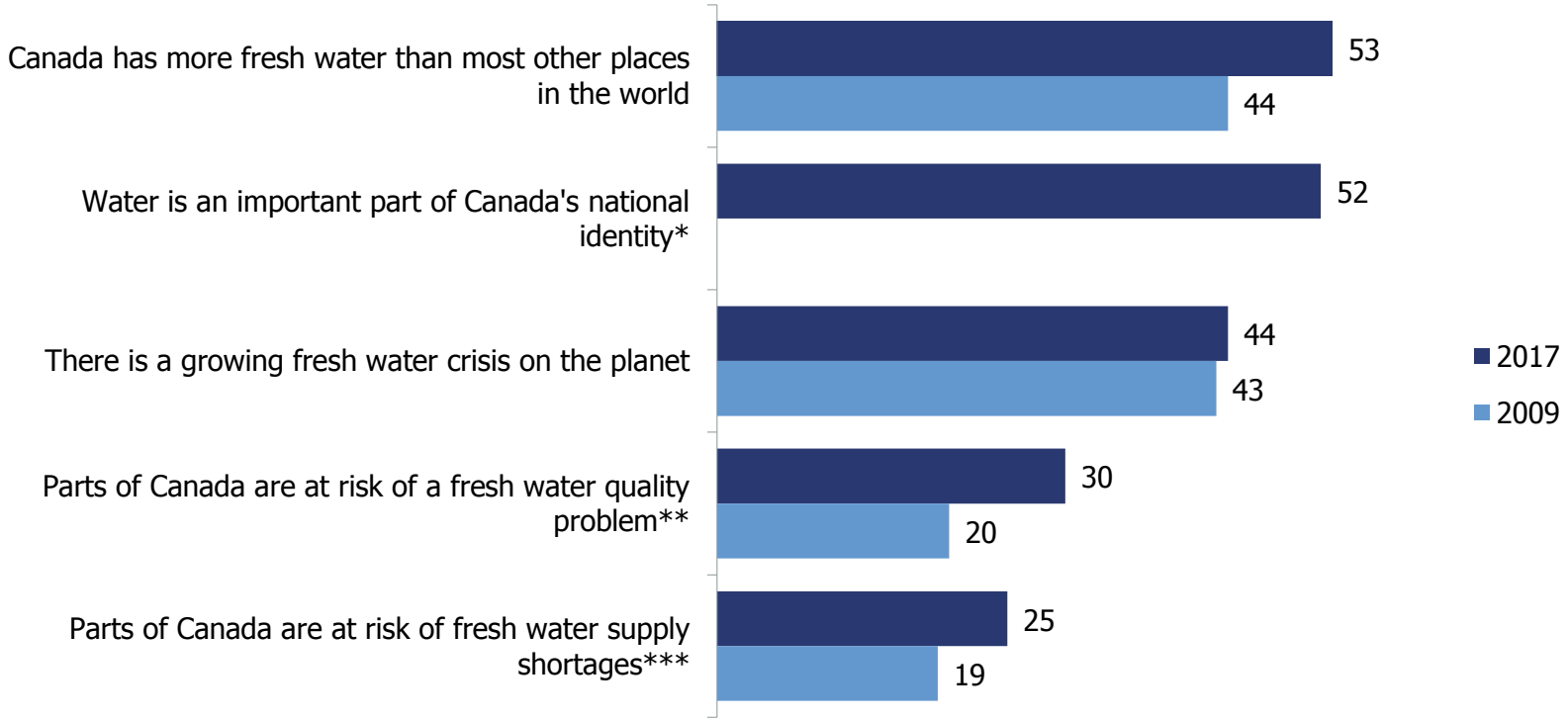
Q. Do you agree or disagree with the following statements?



2017 RBC Canadian Water Attitudes Study

# While Canadians recognize that Canada has more water than most other places, they feel that water quality and supply could be at risk, more so than in 2009

## Perceptions of Canada's Fresh Water, "Strongly Agree," 2009–2017




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

*New in 2017

**In 2009 "Canada is at risk of a fresh water quality problem

***In 2009 "Canada is at risk of fresh water supply shortages

Q. Do you agree or disagree with the following statements?

# Perceptions of Canada's Fresh Water, "Strongly Agree" and "Somewhat Agree," Demographics, 2017

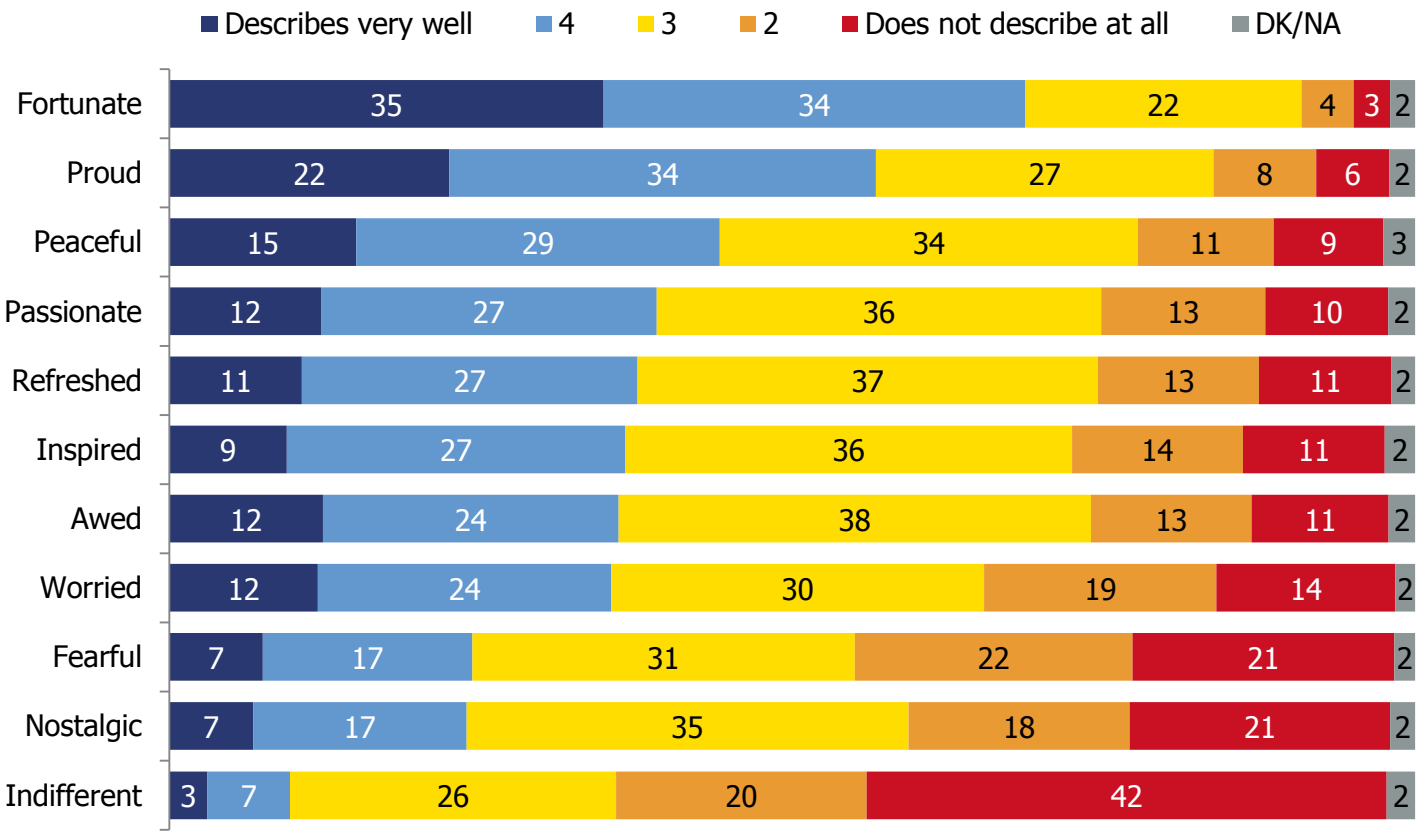
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Parts of Canada are at risk of fresh water supply shortages | 79 | 66 | 76 | 73 | 64 | 81 | 78 | 66 | 81 | 75 | 60 | 78 | 71 | 71 | 73 | 68 | 74 | 71 | 71 | 75 |
| Parts of Canada are at risk of a fresh water quality problem | 80 | 73 | 85 | 79 | 79 | 85 | 79 | 75 | 84 | 78 | 76 | 89 | 79 | 78 | 81 | 78 | 80 | 79 | 79 | 82 |
| Canada has more fresh water than most other places in the world | 91 | 89 | 92 | 92 | 95 | 92 | 93 | 88 | 90 | 91 | 96 | 92 | 91 | 91 | 95 | 94 | 91 | 93 | 91 | 93 |
| There is a growing fresh water crisis on the planet | 88 | 82 | 84 | 87 | 90 | 90 | 87 | 86 | 90 | 86 | 90 | 91 | 85 | 88 | 88 | 87 | 88 | 87 | 86 | 88 |
| Water is an important part of Canada's national identity | 91 | 86 | 92 | 90 | 93 | 94 | 93 | 86 | 93 | 89 | 89 | 95 | 87 | 91 | 94 | 91 | 91 | 91 | 92 | 88 |

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

Q. Do you agree or disagree with the following statements?

# Canadians tend to hold positive feelings toward fresh water in lakes, rivers, and streams, especially "fortunate" and "proud." Very few are indifferent

## Feelings About Fresh Water in Canada's Lakes, Rivers and Streams, 2017




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

Q. (New in 2017) When you think about Canada's fresh water in lakes, rivers, and streams, how well does each of the following describe how you feel? *Please use a scale of 1 to 5 where one means "does not describe at all" and 5 means "describes very well."*

# Feelings About Fresh Water in Canada's Lakes, Rivers, and Streams "Describes Very Well" and "Describes Well," Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Awed | 41 | 37 | 32 | 37 | 34 | 35 | 39 | 36 | 36 | 36 | 30 | 39 | 37 | 37 | 35 | 36 | 36 | 36 | 38 | 33 |
| Fearful | 23 | 17 | 26 | 23 | 29 | 28 | 21 | 16 | 21 | 22 | 28 | 21 | 24 | 24 | 24 | 22 | 26 | 21 | 28 | 32 |
| Fortunate | 74 | 68 | 66 | 71 | 62 | 74 | 72 | 66 | 64 | 68 | 65 | 69 | 63 | 70 | 72 | 69 | 68 | 69 | 69 | 67 |
| Inspired | 44 | 35 | 30 | 38 | 35 | 34 | 45 | 36 | 29 | 39 | 34 | 41 | 38 | 39 | 32 | 37 | 36 | 37 | 38 | 33 |
| Nostalgic | 28 | 20 | 21 | 25 | 22 | 27 | 23 | 20 | 20 | 25 | 23 | 32 | 25 | 25 | 22 | 23 | 25 | 24 | 24 | 26 |
| Passionate | 42 | 33 | 36 | 40 | 38 | 45 | 43 | 35 | 31 | 41 | 36 | 44 | 36 | 41 | 39 | 38 | 40 | 38 | 37 | 47 |
| Proud | 57 | 55 | 51 | 57 | 59 | 55 | 56 | 51 | 55 | 54 | 60 | 57 | 52 | 60 | 57 | 57 | 56 | 56 | 56 | 61 |
| Refreshed | 43 | 37 | 36 | 41 | 29 | 41 | 45 | 42 | 32 | 40 | 31 | 47 | 42 | 38 | 33 | 38 | 37 | 37 | 39 | 37 |
| Indifferent | 10 | 10 | 11 | 11 | 8 | 3 | 11 | 11 | 13 | 12 | 10 | 5 | 15 | 9 | 6 | 11 | 9 | 10 | 12 | 7 |
| Worried | 36 | 22 | 35 | 36 | 39 | 41 | 28 | 21 | 37 | 36 | 40 | 34 | 38 | 34 | 35 | 32 | 39 | 32 | 42 | 43 |
| Peaceful | 47 | 45 | 45 | 47 | 38 | 45 | 44 | 44 | 44 | 47 | 40 | 51 | 48 | 46 | 39 | 44 | 44 | 45 | 41 | 46 |

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

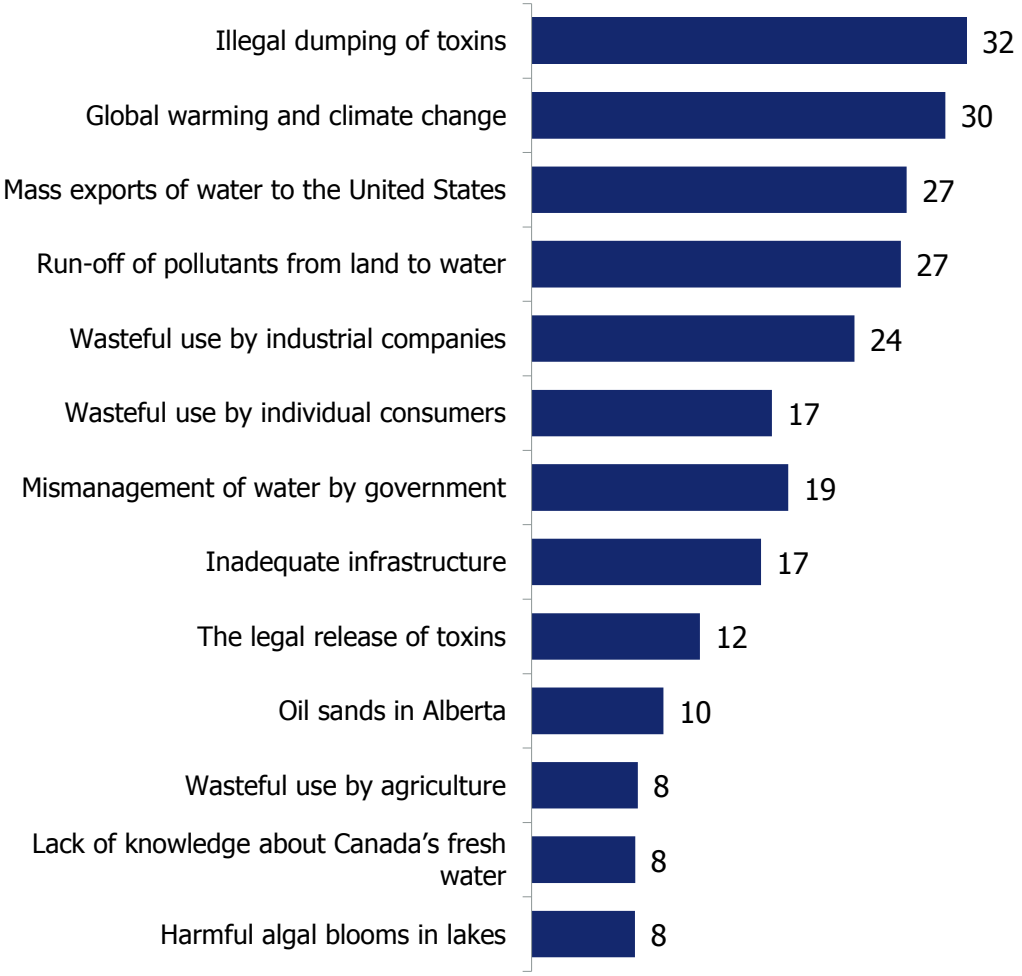
Q. (New in 2017) When you think about Canada's fresh water in lakes, rivers, and streams, how well does each of the following describe how you feel? *Please use a scale of 1 to 5 where one means "does not describe at all" and 5 means "describes very well."*

# Perceived Threats to Our Water: Quality and Supply

2017
RBC Canadian Water Attitudes Study

# Illegal dumping of toxins and climate change are among the biggest perceived threats to Canada's fresh water supplies

## Biggest Threats to Canada's Fresh Water Supply, Total Mentions, 2017



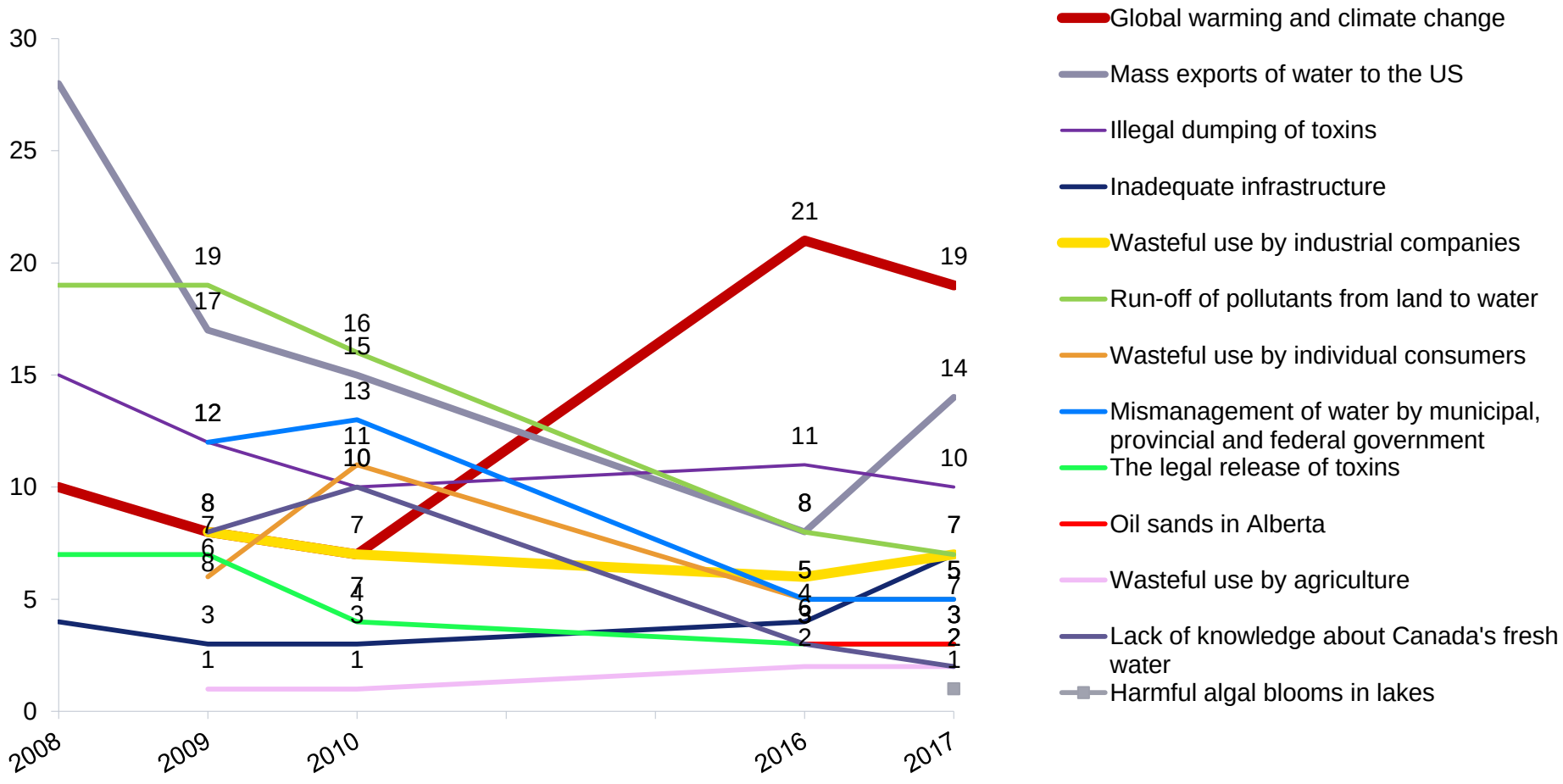

Younger Canadians aged 18-35 are more likely to perceive climate change (36%) as among the biggest threats to Canada's fresh water supply than those aged 55+ (25%). Older Canadians aged 55+ are more likely to perceive mass water exports to the United States (32%) as among the biggest threats than those under 35 years of age (22%).

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

Q. What do you think are the biggest threats to Canada's fresh water supply?

# Nearly twice as many Canadians view climate change as the biggest threat to Canada's fresh water supply than in 2008; concern about mass exports of water to the United States has increased in 2017 but much less than in 2008

## Biggest Threats to Canada's 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

Q. (Modified in 2016) What do you think are the biggest threats to Canada's fresh water supply?

# Biggest Threats to Canada's Fresh Water Supply, Total Mentions Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Global warming and climate change | 28 | 23 | 21 | 34 | 29 | 35 | 31 | 23 | 22 | 37 | 29 | 40 | 36 | 30 | 25 | 29 | 31 | 31 | 31 | 27 |
| Inadequate infrastructure (leaking pipes etc.) | 15 | 14 | 17 | 15 | 21 | 15 | 16 | 14 | 15 | 15 | 23 | 13 | 16 | 16 | 18 | 16 | 17 | 17 | 14 | 19 |
| Mass exports of water to the United States | 37 | 32 | 22 | 30 | 18 | 27 | 29 | 34 | 21 | 25 | 16 | 26 | 22 | 27 | 32 | 30 | 25 | 27 | 27 | 31 |
| Wasteful use by individual consumers | 20 | 19 | 19 | 14 | 19 | 19 | 19 | 24 | 15 | 13 | 21 | 22 | 20 | 15 | 18 | 17 | 18 | 18 | 17 | 18 |
| Wasteful use by agriculture | 9 | 9 | 6 | 6 | 9 | 11 | 12 | 8 | 6 | 7 | 10 | 7 | 12 | 6 | 6 | 8 | 8 | 8 | 10 | 4 |
| Wasteful use by industrial companies | 23 | 22 | 23 | 23 | 25 | 25 | 25 | 23 | 23 | 20 | 26 | 27 | 22 | 24 | 24 | 23 | 24 | 23 | 26 | 21 |
| Illegal dumping of toxins | 28 | 31 | 35 | 35 | 27 | 34 | 25 | 28 | 31 | 35 | 30 | 23 | 25 | 32 | 36 | 30 | 33 | 33 | 28 | 33 |
| The legal release of toxins | 13 | 13 | 17 | 12 | 11 | 9 | 9 | 11 | 13 | 12 | 14 | 7 | 13 | 13 | 11 | 11 | 14 | 11 | 10 | 19 |
| Run-off of pollutants from land to water | 30 | 22 | 31 | 28 | 24 | 29 | 26 | 21 | 34 | 26 | 23 | 30 | 23 | 26 | 30 | 26 | 28 | 26 | 27 | 29 |
| Mismanagement of water by municipal, provincial and federal governments | 18 | 25 | 21 | 16 | 18 | 22 | 19 | 24 | 23 | 15 | 14 | 19 | 13 | 16 | 26 | 21 | 17 | 18 | 19 | 23 |
| Lack of knowledge about Canada's fresh water | 6 | 11 | 7 | 8 | 5 | 13 | 7 | 11 | 6 | 6 | 6 | 10 | 7 | 7 | 8 | 7 | 8 | 7 | 7 | 12 |
| Oil sands in Alberta | 14 | 11 | 4 | 8 | 11 | 9 | 13 | 10 | 6 | 9 | 10 | 8 | 14 | 9 | 7 | 10 | 10 | 11 | 8 | 7 |

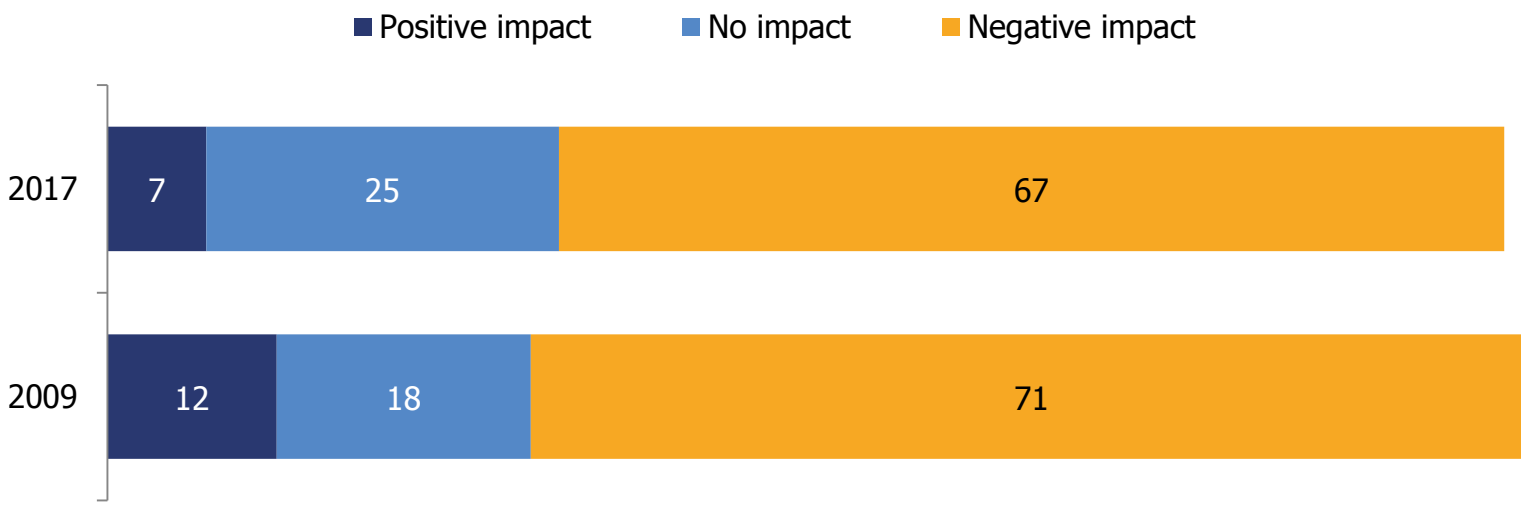


Base: All respondents 2017 *n*=2,017

Q. (Modified in 2016) What do you think are the biggest threats to Canada's fresh water supply?

# A majority believe that climate change will have a negative impact on Canada's supply and quality of fresh water; however, one-quarter believe that there will be no impact, more than in 2009

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



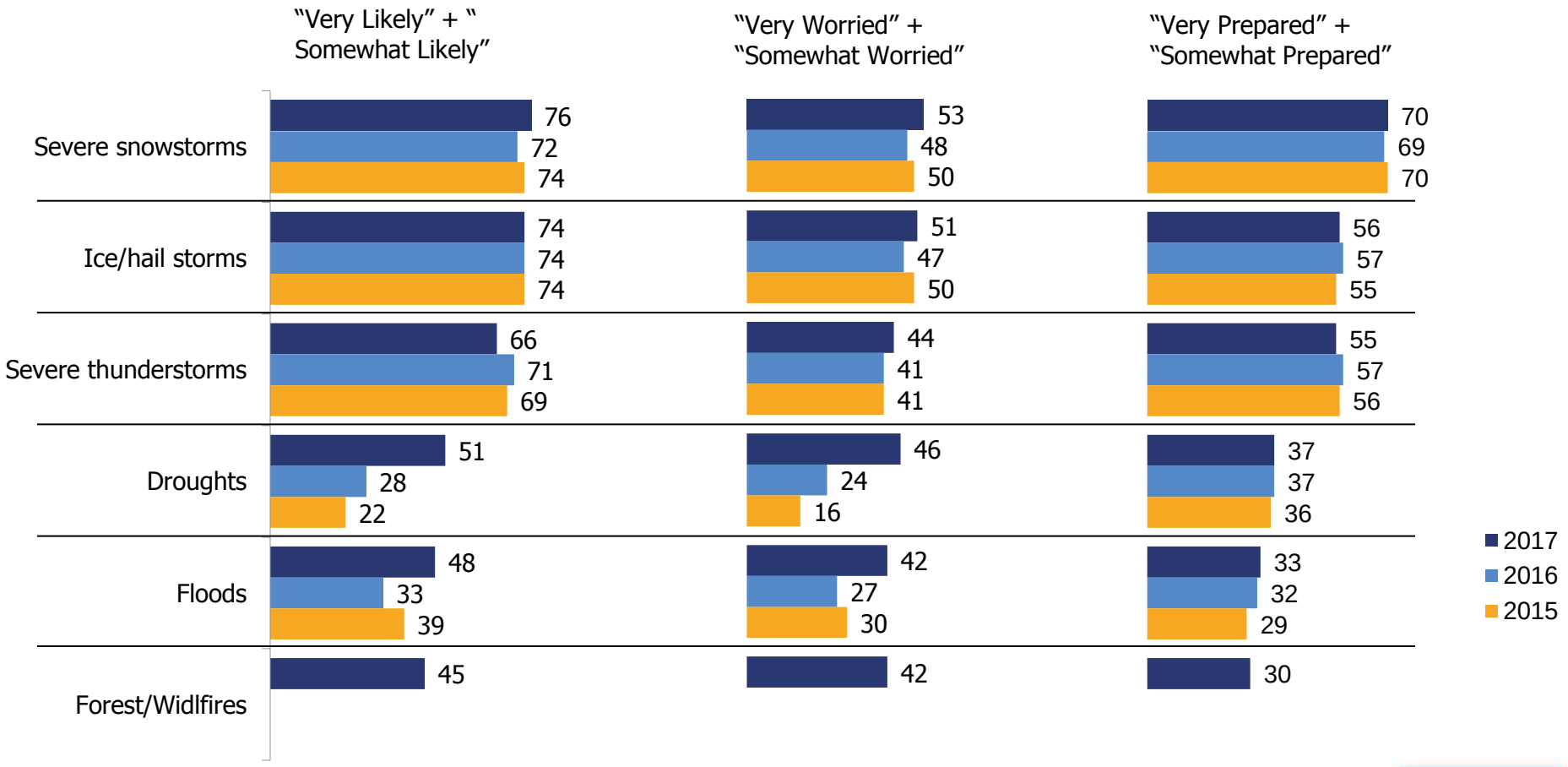

Quebecers (77%) are the most likely to say climate change will have a negative impact while only Albertans say there will be a negative impact (49%) or no impact (43%). Those over the age of 55 (63%) are less likely say climate change will have a negative impact than younger Canadians.

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

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

# The perception that droughts and floods could adversely affect Canadians has increased significantly in the past year, yet Canadians' preparedness remains nearly the same

## Likelihood/Worry/Preparedness for Adverse Weather Events, "Very" and "Somewhat" Likely/Worried/Prepared, 2015 –2017

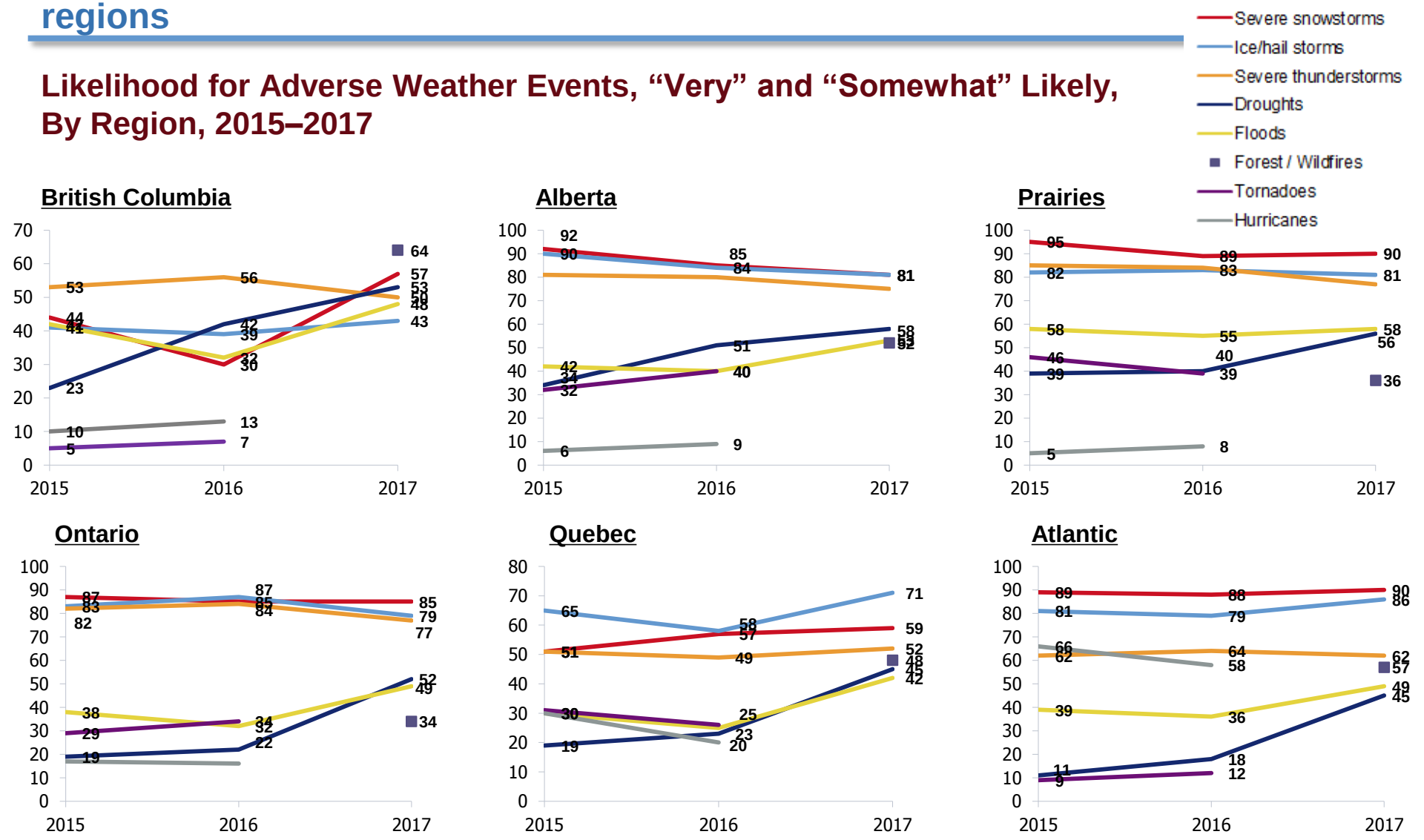



Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194, 2015 *n*=2,242

Q. Please answer the following questions about how likely the following types of events could adversely affect you or your family, how worried you may be about them, and how prepared you are to cope with them.

# Regional perceptions vary on the likelihood of different types of adverse weather events, although drought has increased in all regions

## Likelihood for Adverse Weather Events, "Very" and "Somewhat" Likely, By Region, 2015–2017




Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194, 2015 *n*=2,242

Q. Please answer the following questions about how likely the following types of events could adversely affect you or your family, how worried you may be about them, and how prepared you are to cope with them.



2017 RBC Canadian Water Attitudes Study

# Likelihood/Worry/Preparedness for Adverse Weather Events "Very" and "Somewhat" Likely/Worried/Prepared, Demographics, 2017 (1)

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **How likely?** | | | | | | | | | | | | | | | | | | | | |
| Severe snowstorms | 57 | 81 | 90 | 85 | 59 | 90 | 56 | 82 | 87 | 83 | 69 | 92 | 78 | 75 | 73 | 72 | 79 | 75 | 75 | 78 |
| Floods | 48 | 53 | 58 | 49 | 42 | 49 | 51 | 66 | 66 | 53 | 42 | 58 | 55 | 50 | 40 | 47 | 49 | 50 | 48 | 40 |
| Severe thunderstorms | 50 | 75 | 77 | 77 | 52 | 62 | 47 | 74 | 73 | 76 | 57 | 63 | 64 | 68 | 67 | 63 | 70 | 66 | 69 | 66 |
| Droughts | 53 | 58 | 56 | 52 | 45 | 45 | 48 | 54 | 46 | 51 | 37 | 43 | 48 | 54 | 50 | 50 | 52 | 48 | 52 | 63 |
| Ice/hail storms | 43 | 81 | 81 | 79 | 71 | 86 | 40 | 84 | 75 | 77 | 76 | 78 | 71 | 75 | 74 | 69 | 77 | 72 | 71 | 83 |
| Forest fires / wildfires | 64 | 52 | 36 | 34 | 48 | 57 | 57 | 48 | 34 | 35 | 44 | 62 | 48 | 45 | 43 | 46 | 44 | 42 | 50 | 48 |
| **How worried?** | | | | | | | | | | | | | | | | | | | | |
| Severe snowstorms | 40 | 51 | 57 | 58 | 49 | 68 | 43 | 53 | 57 | 58 | 53 | 63 | 49 | 57 | 53 | 49 | 57 | 53 | 57 | 50 |
| Floods | 41 | 41 | 45 | 45 | 38 | 42 | 43 | 49 | 51 | 50 | 34 | 44 | 44 | 46 | 36 | 41 | 43 | 44 | 41 | 38 |
| Severe thunderstorms | 28 | 42 | 48 | 51 | 45 | 37 | 30 | 43 | 45 | 51 | 43 | 33 | 37 | 47 | 47 | 40 | 49 | 45 | 46 | 40 |
| Droughts | 49 | 44 | 44 | 49 | 41 | 47 | 47 | 41 | 37 | 49 | 33 | 42 | 41 | 48 | 47 | 43 | 49 | 44 | 45 | 56 |
| Ice/hail storms | 31 | 52 | 47 | 54 | 54 | 59 | 31 | 57 | 46 | 54 | 54 | 51 | 43 | 54 | 53 | 50 | 52 | 50 | 52 | 52 |
| Forest fires / wildfires | 62 | 40 | 32 | 35 | 44 | 49 | 56 | 40 | 31 | 37 | 39 | 55 | 41 | 43 | 42 | 40 | 44 | 40 | 46 | 44 |

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

Q. Please answer the following questions about how likely the following types of events could adversely affect you or your family, how worried you may be about them, and how prepared you are to cope with them.

# Likelihood/Worry/Preparedness for Adverse Weather Events "Very" and "Somewhat" Likely/Worried/Prepared, Demographics, 2017 (2)

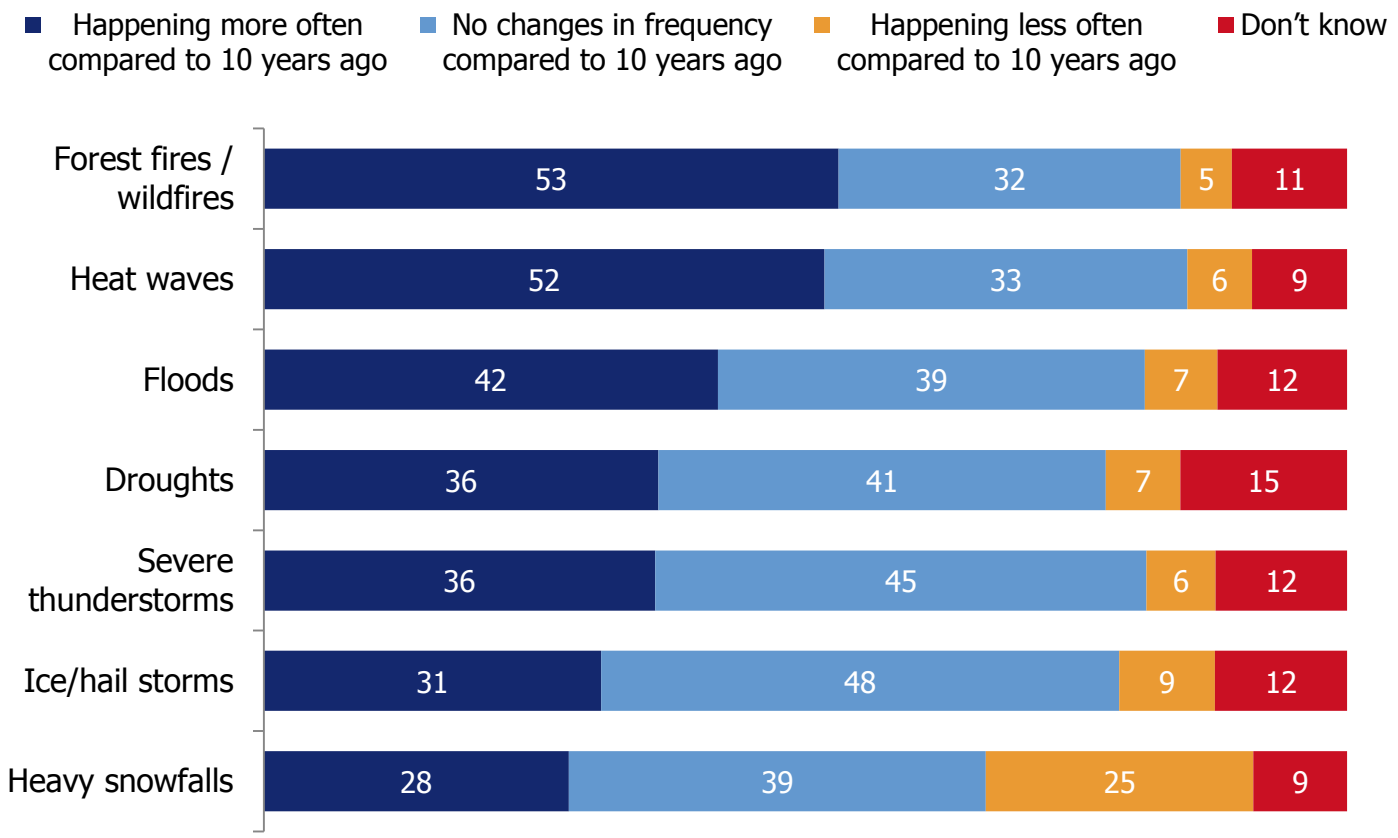
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **How prepared?** | | | | | | | | | | | | | | | | | | | | |
| Severe snowstorms | 52 | 73 | 75 | 71 | 69 | 82 | 46 | 74 | 75 | 69 | 67 | 78 | 69 | 66 | 73 | 72 | 67 | 67 | 71 | 78 |
| Floods | 34 | 43 | 54 | 37 | 27 | 43 | 33 | 48 | 50 | 37 | 25 | 37 | 36 | 36 | 38 | 39 | 34 | 37 | 36 | 38 |
| Severe thunderstorms | 44 | 59 | 65 | 60 | 47 | 63 | 37 | 57 | 64 | 59 | 48 | 54 | 56 | 54 | 57 | 56 | 55 | 53 | 58 | 60 |
| Droughts | 34 | 35 | 35 | 35 | 26 | 37 | 30 | 38 | 36 | 36 | 26 | 30 | 33 | 33 | 33 | 37 | 30 | 31 | 36 | 36 |
| Ice/hail storms | 36 | 54 | 57 | 59 | 55 | 71 | 32 | 56 | 58 | 59 | 52 | 63 | 57 | 52 | 58 | 57 | 55 | 53 | 56 | 64 |
| Forest fires / wildfires | 37 | 36 | 35 | 26 | 23 | 42 | 29 | 37 | 33 | 26 | 21 | 38 | 30 | 29 | 31 | 34 | 25 | 28 | 31 | 32 |

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

Q. Please answer the following questions about how likely the following types of events could adversely affect you or your family, how worried you may be about them, and how prepared you are to cope with them.

# Half of Canadians feel forest fires and heat waves are happening more often compared to 10 years ago, while a quarter say that heavy snowfalls are happening less frequently

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

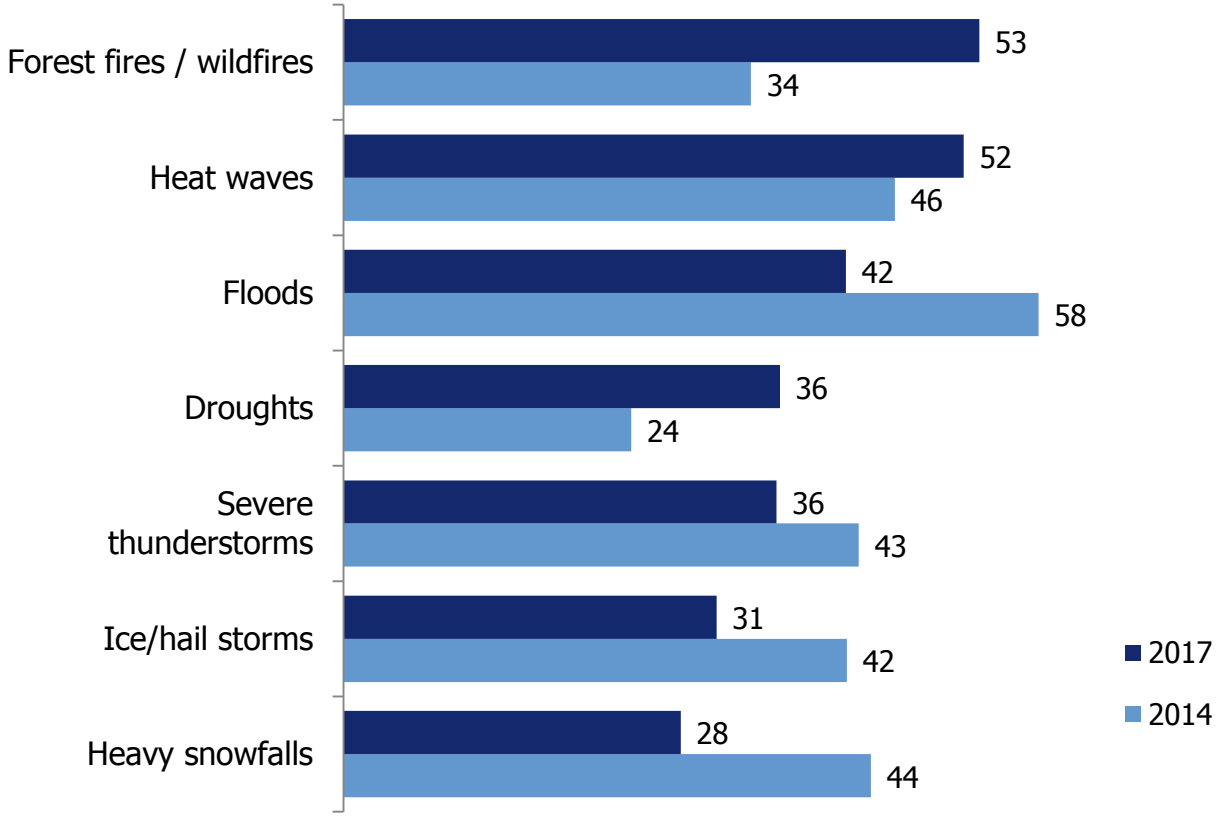



Base: All respondents 2017 *n*=2,017

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

# More Canadians today feel that forest fires, heat waves, and droughts are happening more frequently compared to ten years ago than in 2014, while a lot fewer say floods and heavy snowfalls are happening more often

## Perceived Change in Frequency of Weather Events Compared to Ten Years Ago, "Happening More Often," 2014–2017




Base: All respondents 2017 *n*=2,017, 2014 *n*=2,074

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

# Perceived Change in Frequency of Weather Events Compared to Ten Years Ago "Happening More Often," Demographics, 2017

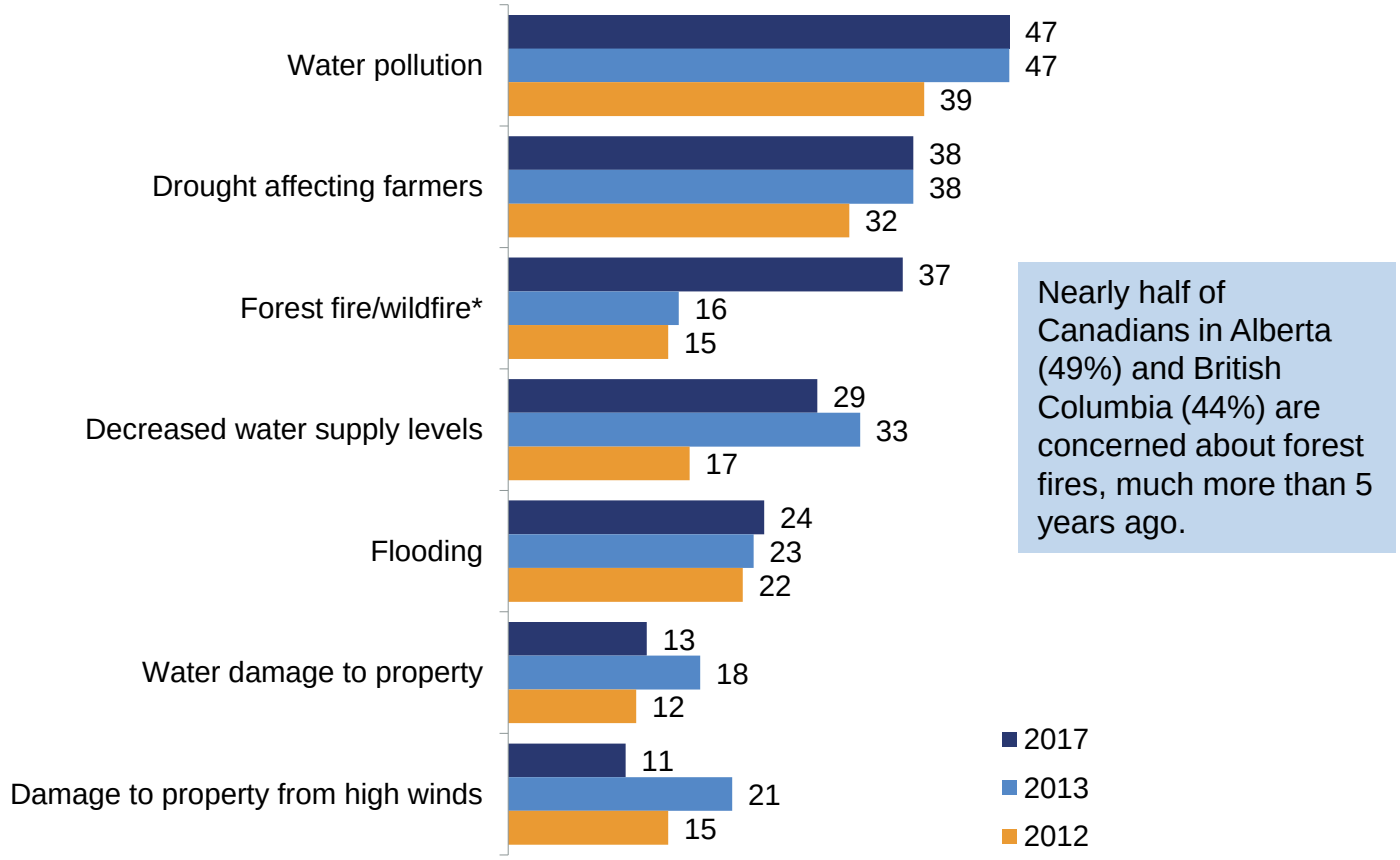
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Heat waves | 54 | 27 | 36 | 56 | 59 | 56 | 51 | 29 | 40 | 54 | 56 | 65 | 51 | 54 | 50 | 50 | 53 | 52 | 55 | 47 |
| Heavy snowfalls | 42 | 23 | 39 | 23 | 23 | 42 | 48 | 25 | 45 | 20 | 24 | 38 | 33 | 30 | 23 | 25 | 31 | 27 | 28 | 30 |
| Floods | 47 | 42 | 40 | 34 | 45 | 63 | 46 | 45 | 37 | 32 | 39 | 57 | 34 | 45 | 45 | 38 | 45 | 40 | 40 | 52 |
| Forest fires / wildfires | 65 | 49 | 51 | 51 | 50 | 64 | 62 | 45 | 48 | 48 | 48 | 72 | 49 | 51 | 59 | 50 | 56 | 53 | 52 | 53 |
| Severe thunderstorms | 28 | 34 | 35 | 35 | 43 | 35 | 29 | 34 | 41 | 33 | 38 | 32 | 30 | 39 | 38 | 33 | 39 | 34 | 39 | 40 |
| Droughts | 41 | 30 | 29 | 37 | 36 | 45 | 41 | 26 | 25 | 33 | 29 | 50 | 32 | 39 | 37 | 35 | 38 | 35 | 39 | 41 |
| Ice/hail storms | 24 | 28 | 26 | 28 | 40 | 40 | 26 | 32 | 25 | 27 | 32 | 36 | 28 | 33 | 31 | 29 | 33 | 29 | 37 | 31 |

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

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

# Concerns about water pollution and drought affecting farmers continues to be the main concern of a series of extreme weather events

## Greatest Concern about Extreme Weather Events, Total Mentions, 2012–2017




Nearly half of Canadians in Alberta (49%) and British Columbia (44%) are concerned about forest fires, much more than 5 years ago.

Base: All respondents 2017 *n*=2,017, 2013 *n*=2,282, 2012 *n*=2,428

*"Wildfire" in 2013

Q. When you think of the increasing frequency and severity of extreme weather events, which two of the following most concern you?

# Greatest Concern about Extreme Weather Events Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18 to 34 years | 35 to 55 years | >55 years | Male | Female | Urban (> 100 000) | Mid-size towns/ cities | Rural (<1000) |
| Water pollution | 46 | 32 | 38 | 48 | 60 | 38 | 49 | 29 | 43 | 56 | 58 | 36 | 54 | 52 | 38 | 47 | 48 | 50 | 47 | 39 |
| Drought affecting farmers | 41 | 44 | 34 | 41 | 29 | 41 | 35 | 39 | 31 | 37 | 28 | 32 | 29 | 39 | 44 | 39 | 37 | 36 | 38 | 47 |
| Decreased water supply levels | 32 | 26 | 22 | 27 | 35 | 27 | 33 | 27 | 23 | 27 | 34 | 24 | 30 | 28 | 30 | 26 | 32 | 29 | 29 | 30 |
| Flooding | 18 | 29 | 38 | 22 | 22 | 26 | 19 | 35 | 43 | 21 | 23 | 23 | 27 | 20 | 25 | 24 | 23 | 25 | 22 | 21 |
| Damage to property from high winds | 9 | 8 | 16 | 13 | 9 | 18 | 8 | 9 | 11 | 14 | 10 | 25 | 13 | 11 | 11 | 15 | 8 | 11 | 12 | 11 |
| Water damage to property | 11 | 13 | 15 | 14 | 12 | 17 | 15 | 15 | 17 | 15 | 13 | 26 | 14 | 16 | 10 | 15 | 11 | 14 | 12 | 9 |
| Forest fire / wildfire* | 44 | 49 | 37 | 35 | 33 | 33 | 41 | 46 | 32 | 29 | 35 | 34 | 33 | 34 | 44 | 34 | 40 | 35 | 40 | 42 |

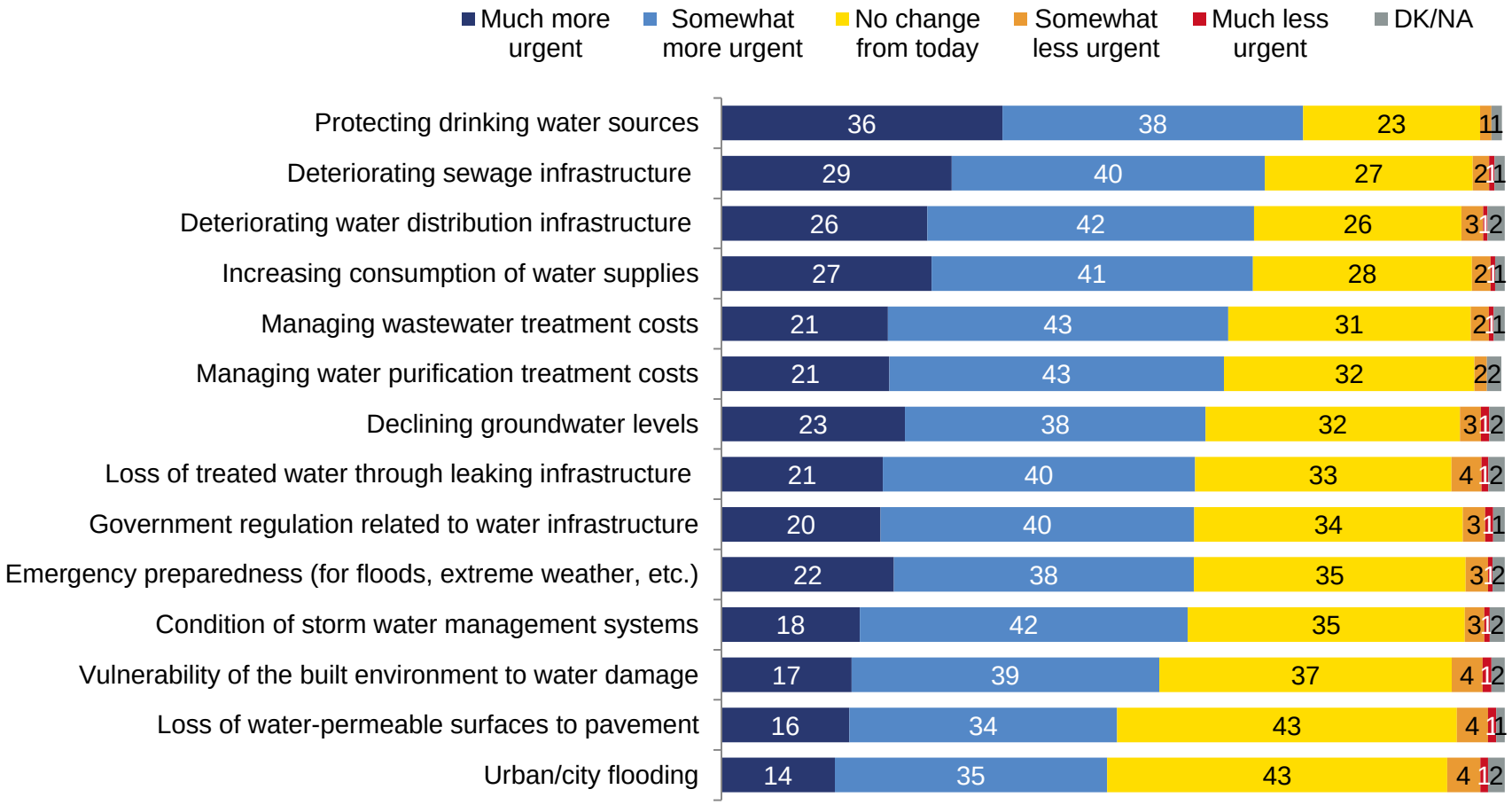
Base: All respondents 2017 *n*=2,017

*"Wildfire" in 2013

Q. When you think of the increasing frequency and severity of extreme weather events, which two of the following most concern you?

# More Canadians perceive that water issues and infrastructure needs are going to become more urgent in ten years time than those who think there will be no change in urgency or less urgent

## Urgency of Issues for Canadian Communities in Ten Years, 2017




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

Q. 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? Do you agree or disagree with the following statements?

# Urgency of Issues for Canadian Communities in Ten Years
# "Much More Urgent" and "Somewhat More Urgent," Demographics, 2017 (1)

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Declining groundwater levels | 63 | 53 | 58 | 63 | 62 | 71 | 60 | 54 | 60 | 58 | 61 | 63 | 55 | 61 | 68 | 60 | 64 | 61 | 64 | 64 |
| Protecting drinking water sources | 76 | 64 | 77 | 74 | 77 | 79 | 72 | 61 | 78 | 71 | 78 | 81 | 67 | 75 | 79 | 71 | 77 | 74 | 76 | 73 |
| Increasing consumption of water supplies | 69 | 64 | 68 | 66 | 70 | 73 | 66 | 63 | 71 | 64 | 68 | 76 | 60 | 66 | 76 | 65 | 70 | 66 | 69 | 73 |
| Loss of treated water through leaking infrastructure | 58 | 49 | 58 | 62 | 65 | 64 | 56 | 44 | 61 | 60 | 64 | 69 | 46 | 61 | 70 | 60 | 61 | 60 | 62 | 61 |
| Deteriorating water distribution infrastructure generally | 71 | 57 | 69 | 66 | 75 | 70 | 66 | 53 | 72 | 64 | 73 | 71 | 57 | 68 | 76 | 67 | 69 | 67 | 71 | 69 |
| Deteriorating sewage infrastructure | 68 | 63 | 72 | 71 | 69 | 73 | 64 | 58 | 73 | 69 | 66 | 68 | 58 | 68 | 80 | 70 | 69 | 69 | 70 | 69 |
| Managing water purification treatment costs | 68 | 57 | 69 | 64 | 63 | 71 | 65 | 55 | 67 | 61 | 63 | 65 | 52 | 65 | 73 | 62 | 66 | 62 | 68 | 66 |
| Managing wastewater treatment costs | 67 | 58 | 71 | 64 | 64 | 72 | 62 | 57 | 72 | 61 | 63 | 68 | 53 | 65 | 74 | 63 | 66 | 63 | 70 | 64 |

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

Q. 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? Do you agree or disagree with the following statements?

# Urgency of Issues for Canadian Communities in Ten Years
# "Much More Urgent" and "Somewhat More Urgent," Demographics, 2017 (2)

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Condition of storm water management systems | 58 | 51 | 61 | 61 | 60 | 63 | 53 | 49 | 61 | 60 | 54 | 68 | 49 | 60 | 67 | 56 | 63 | 58 | 61 | 62 |
| Emergency preparedness (for floods, extreme weather, etc.) | 63 | 52 | 60 | 61 | 61 | 66 | 62 | 54 | 61 | 59 | 60 | 60 | 51 | 62 | 66 | 57 | 64 | 60 | 61 | 61 |
| Loss of water-permeable surfaces to pavement | 57 | 38 | 52 | 50 | 50 | 58 | 54 | 38 | 52 | 49 | 49 | 56 | 45 | 52 | 54 | 46 | 54 | 49 | 53 | 52 |
| Vulnerability of the built environment (e.g., buildings, roadways, etc.) to water damage | 61 | 43 | 57 | 53 | 61 | 63 | 59 | 42 | 58 | 53 | 60 | 64 | 51 | 56 | 60 | 52 | 60 | 55 | 57 | 59 |
| Government regulation related to water infrastructure | 61 | 46 | 63 | 62 | 60 | 70 | 60 | 46 | 67 | 60 | 57 | 62 | 49 | 61 | 68 | 57 | 64 | 59 | 62 | 64 |
| Urban/city flooding | 47 | 41 | 51 | 50 | 49 | 60 | 48 | 45 | 51 | 49 | 44 | 59 | 46 | 51 | 50 | 45 | 53 | 47 | 49 | 58 |

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

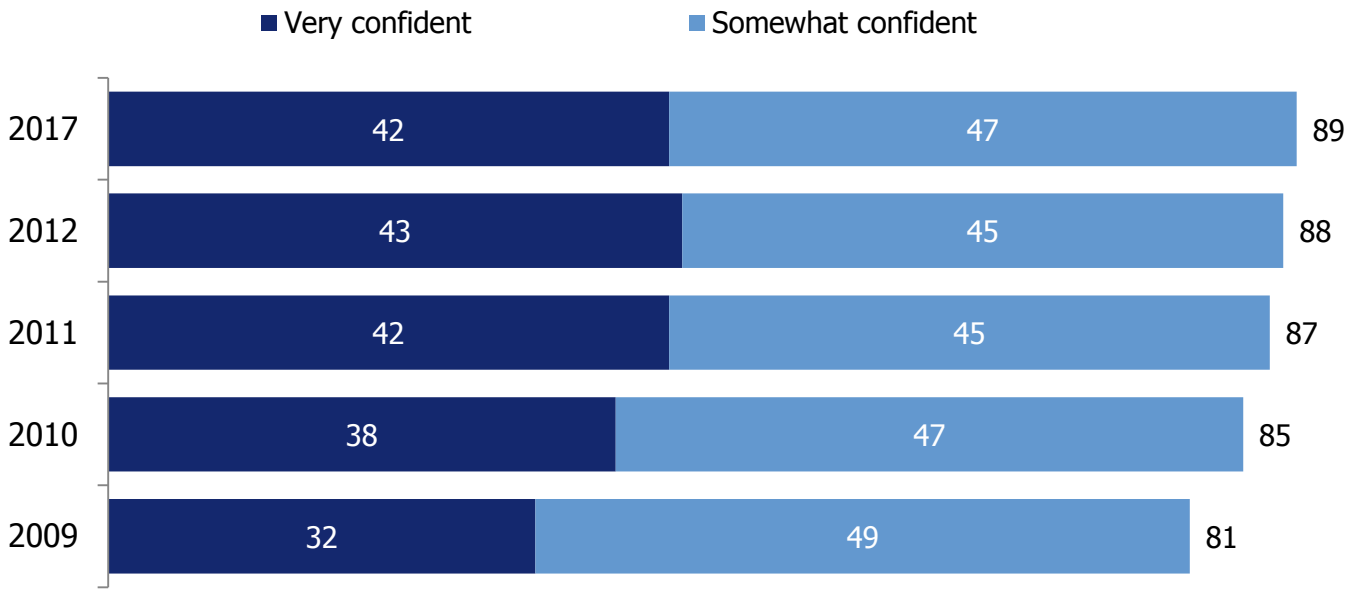
Q. Ten years from now, do you think that each of the following issues will have become less urgent or more urgent for urban communities and municipalities in Canada? Do you agree or disagree with the following statements?

# Drinking Water Quality and Access

2017
RBC Canadian Water Attitudes Study

# Confidence about water safety and quality has been increasing since 2009

## Confidence about Water Safety and Quality in the Home, 2009–2017




| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| "Very confident" + "Somewhat confident" | 94 | 91 | 88 | 92 | 84 | 83 | 95 | 92 | 87 | 91 | 88 | 84 | 87 | 90 | 89 | 91 | 88 | 91 | 87 | 83 |



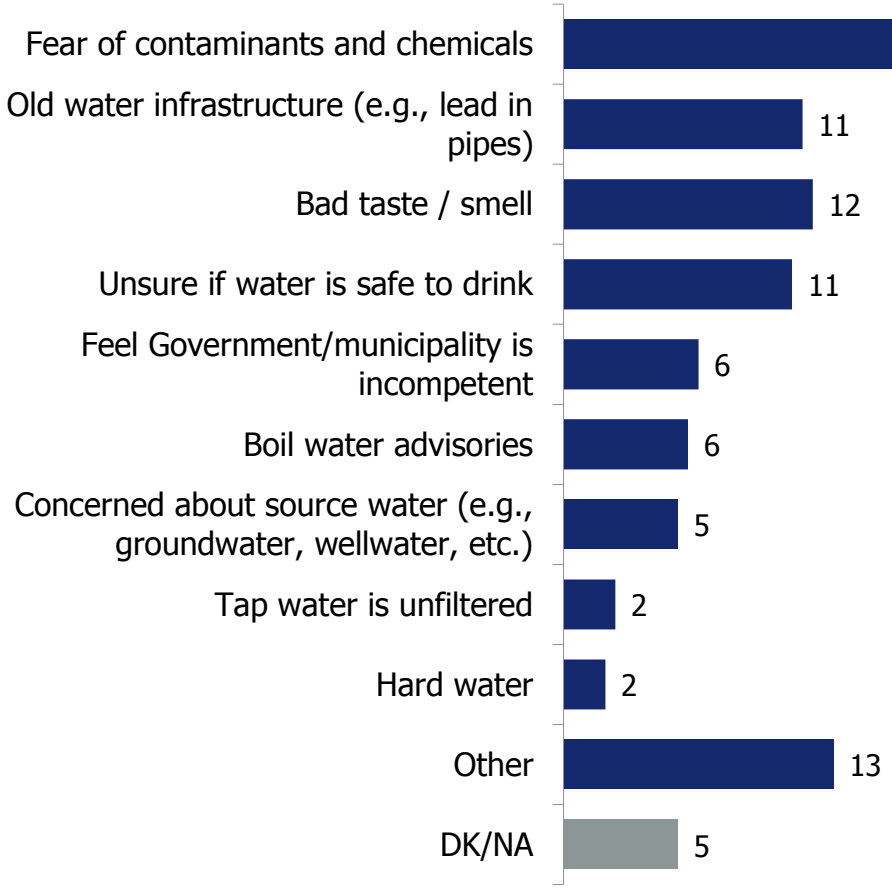
Base: All respondents 2017 *n*=2,017, 2012 *n*=2,428, 2011 *n*=2,066, 2010 *n*=2,022, 2009 *n*=2,165

Q. Overall, how confident are you about the safety and quality of the water in your home?

2017 RBC Canadian Water Attitudes Study

# Canadians who are not confident about the safety or quality of water in their homes say it is because of the fear of contaminants such as lead or concern about the source water

## Reasons for Lack of Confidence in Safety and Quality of Water at Home "Not Very" or "Not at All" Confident, Total Mentions, Unprompted, 2017




> "Old pipes that need to be replaced. Not sure if they're lead pipes that are leeching lead into the water."
> - Newfoundland

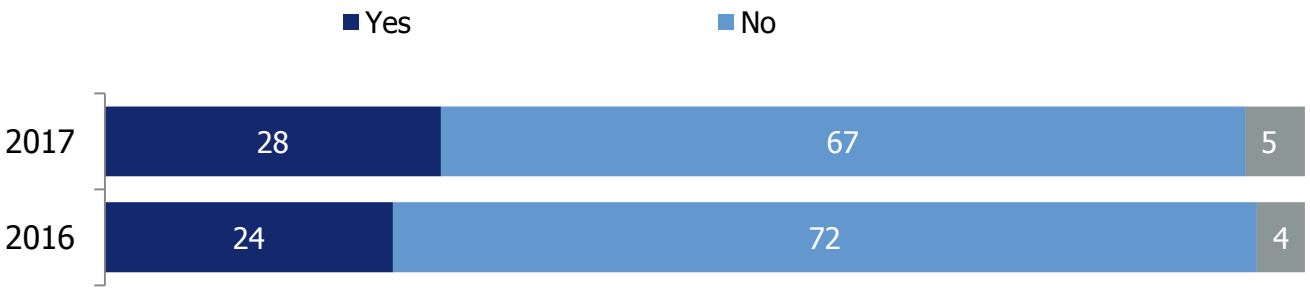
> "With fracking around you never know what's in your water."
> - British Columbia

Base: Those who are not very or not at all confident about the safety and quality of the water in their home. 2017 *n*=202

Q. Why do you say you are "not very" or "not at all" confident about the quality of tap water in your home? – Coded

# Almost three in ten Canadians have experienced living in an area under a boil water advisory

## Experience of Living under a Boil Water Advisory, 2016–2017




Residents of Winnipeg and Montreal are the most likely to indicate they have experienced living under a boil water advisory. The number of respondents in Quebec who have experienced living under a boil water advisory has increased in 2017 (46%) from 2016 (33%).

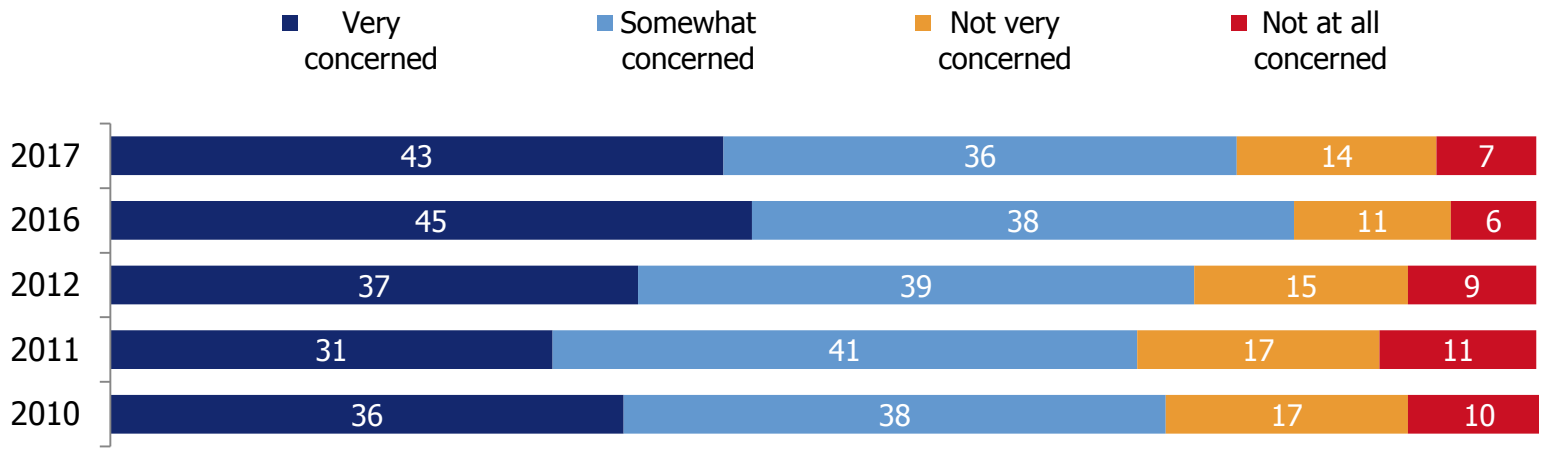
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Yes | 34 | 23 | 39 | 13 | 46 | 35 | 26 | 25 | 47 | 10 | 44 | 25 | 26 | 30 | 28 | 26 | 30 | 25 | 36 | 30 |
| No | 60 | 73 | 57 | 81 | 51 | 64 | 66 | 70 | 48 | 85 | 51 | 73 | 66 | 65 | 70 | 69 | 65 | 70 | 59 | 65 |
| Don't know | 6 | 4 | 4 | 6 | 4 | 1 | 8 | 5 | 6 | 5 | 5 | 2 | 8 | 5 | 2 | 5 | 5 | 5 | 5 | 4 |

Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194

Q. Have you ever experienced living in an area under a boil water advisory in Canada?

# Over four in ten Canadians are very concerned about water conditions on First Nations reserves, but fewer than in 2016

## Concern about Water Conditions on First Nations Reserves, 2010–2017




| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| "Very concerned" + "Somewhat concerned" | 81 | 68 | 77 | 83 | 75 | 83 | 82 | 68 | 82 | 85 | 81 | 82 | 73 | 78 | 83 | 76 | 82 | 80 | 75 | 76 |

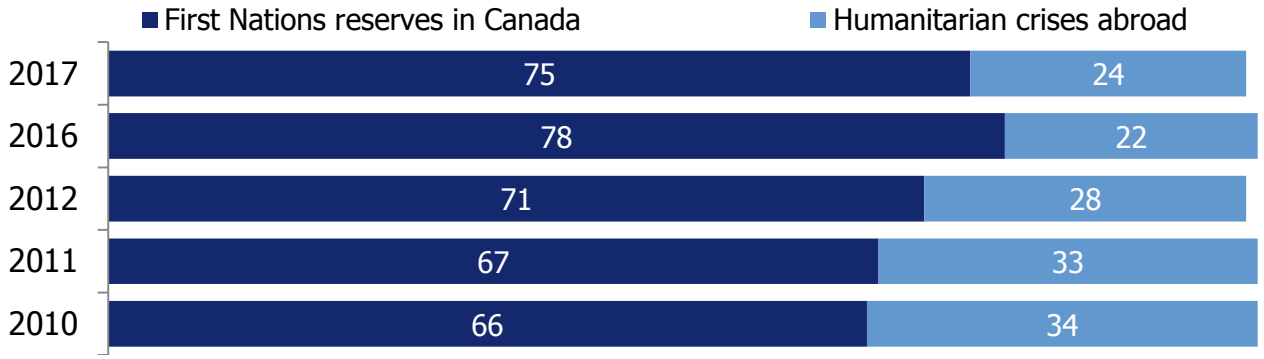
Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194, 2012 *n*=2,428, 2011 *n*=2,066, 2010 *n*=2,022
Q. (modified in 2016) In Canada, people on more than 100 First Nations reserves must boil their water before it is safe to drink. Some reserves have been under boil water advisories for years. How concerned are you about the water conditions on First Nations reserves?



2017 RBC Canadian Water Attitudes Study

# A majority of Canadians continue to be more motivated to support organizations that address the issue of safe drinking water on First Nations reserves than abroad

## Preferred Focus of Support for Safe Drinking Water Programs, 2010–2017




| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| First Nations reserves in Canada | 81 | 71 | 67 | 75 | 75 | 79 | 77 | 68 | 70 | 74 | 73 | 78 | 65 | 74 | 84 | 73 | 77 | 73 | 76 | 81 |
| Humanitarian crises abroad | 18 | 27 | 31 | 24 | 24 | 20 | 22 | 30 | 30 | 26 | 27 | 22 | 34 | 25 | 15 | 26 | 22 | 26 | 23 | 18 |

Base: All respondents 2017 *n*=2,017, 2016 *n*=2,194

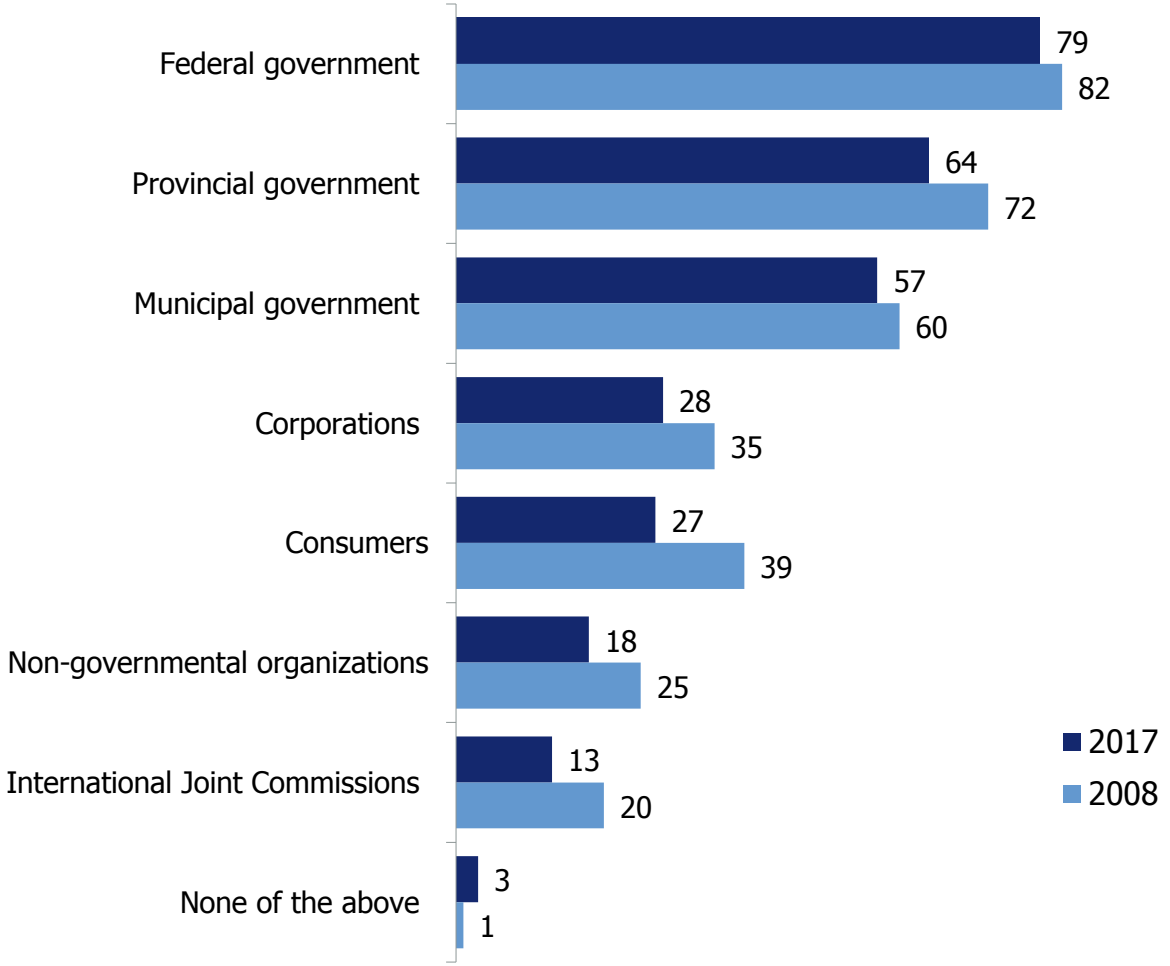
Q. Now, based on this information, would you be more motivated to support an organization that helps to address the issue of safe drinking water on First Nations reserves in Canada or an organization that addresses the issue of safe drinking water during humanitarian crises abroad, such as floods and earthquakes?

# Water Governance, Infrastructure, and Pricing

2017
RBC Canadian Water Attitudes Study

# While most believe that the government, particularly at the federal level, is responsible for the management of clean, fresh water in Canada, there have been declines in perceptions of accountability at all levels

## Responsibility for Clean, Fresh Water Management in Canada, 2008–2017




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

Q. Who do you think should be responsible or accountable for the management of clean, fresh water in Canada? *Choose all that apply*.

# Responsibility for Clean, Fresh Water Management in Canada Demographics, 2017

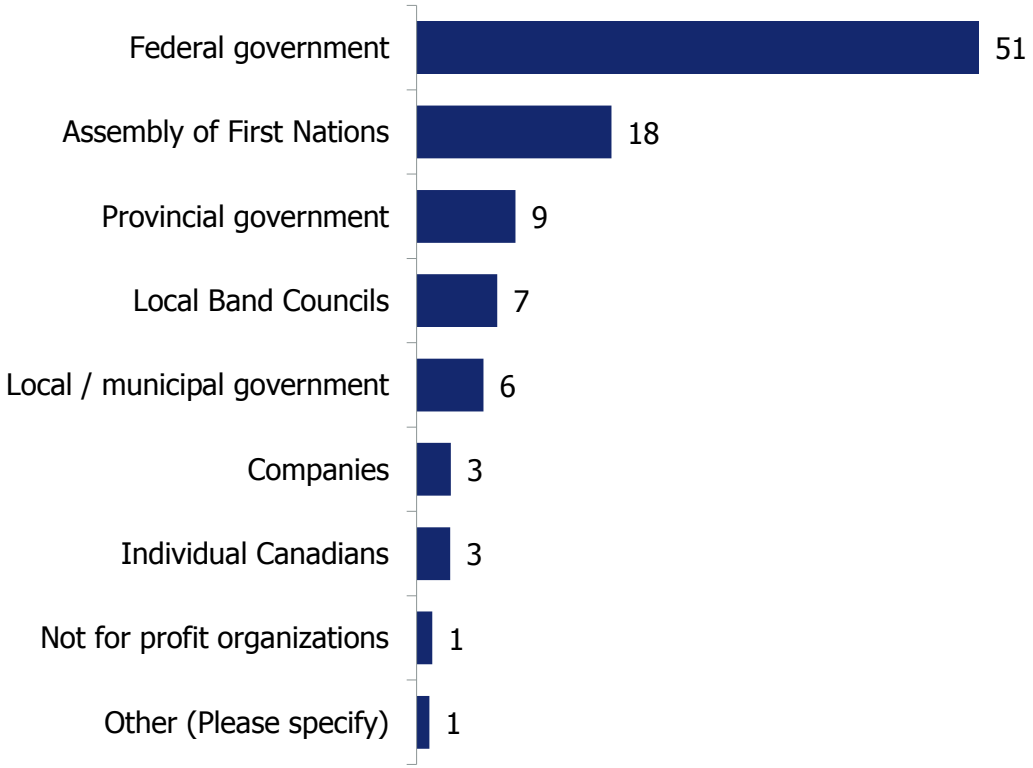
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Federal government | 81 | 77 | 80 | 79 | 78 | 79 | 79 | 73 | 81 | 79 | 80 | 83 | 74 | 81 | 80 | 80 | 78 | 80 | 82 | 72 |
| Provincial government | 71 | 62 | 69 | 62 | 60 | 69 | 72 | 60 | 64 | 64 | 63 | 71 | 63 | 65 | 63 | 64 | 64 | 65 | 62 | 60 |
| Municipal government | 62 | 54 | 63 | 58 | 51 | 59 | 61 | 51 | 59 | 60 | 55 | 65 | 58 | 57 | 56 | 57 | 56 | 60 | 54 | 48 |
| International Joint Commissions | 12 | 10 | 17 | 14 | 14 | 15 | 11 | 7 | 16 | 13 | 15 | 16 | 13 | 15 | 12 | 12 | 15 | 13 | 16 | 14 |
| Non-governmental organizations | 18 | 13 | 19 | 17 | 20 | 23 | 14 | 11 | 15 | 18 | 20 | 15 | 16 | 20 | 17 | 16 | 20 | 17 | 19 | 22 |
| Consumers | 29 | 28 | 32 | 22 | 29 | 39 | 26 | 28 | 21 | 23 | 29 | 32 | 26 | 28 | 28 | 27 | 27 | 26 | 29 | 31 |
| Corporations | 28 | 30 | 29 | 27 | 28 | 32 | 24 | 25 | 23 | 29 | 32 | 28 | 28 | 30 | 27 | 27 | 29 | 28 | 29 | 28 |

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

Q. Who do you think should be responsible or accountable for the management of clean, fresh water in Canada? Choose all that apply.

# Canadians hold the federal government most responsible for improving the quality of water on First Nations reserves

## Agency Most Responsible for Improving the Quality of Water on First Nations Reserves, 2017

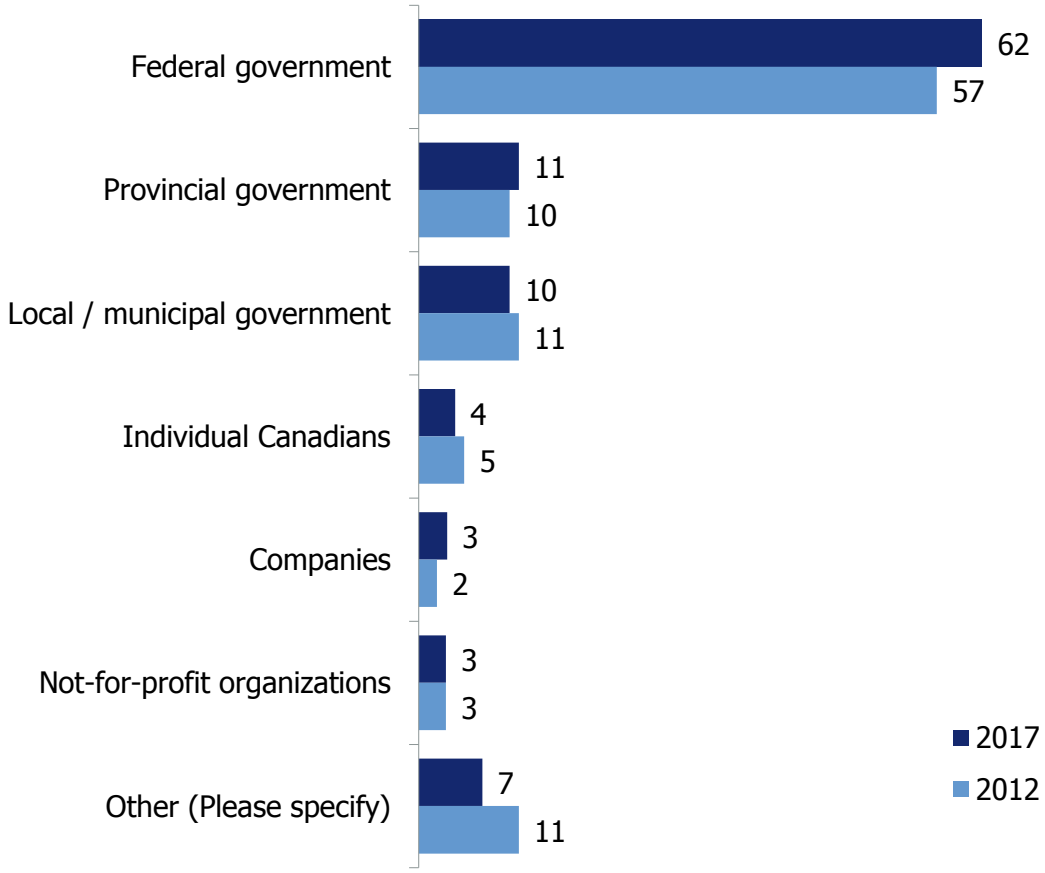



Base: 2017 split sample *n*=1,009

Q. Who should be held most responsible for working to improve the quality of water on First Nations reserves in Canada? *Please select only one.*

# Slightly more Canadians than in 2012 hold the federal government most responsible for improving the quality of water on First Nations reserves

## Agency Most Responsible for Improving the Quality of Water on First Nations Reserves, 2012–2017




Base: 2017 split sample *n*=1,008, 2012 All respondents *n*=2,428

Q. Who should be held most responsible for working to improve the quality of water on First Nations reserves in Canada? *Please select only one.*

# Agency Most Responsible for Improving the Quality of Water on First Nations Reserves, Demographics, 2017

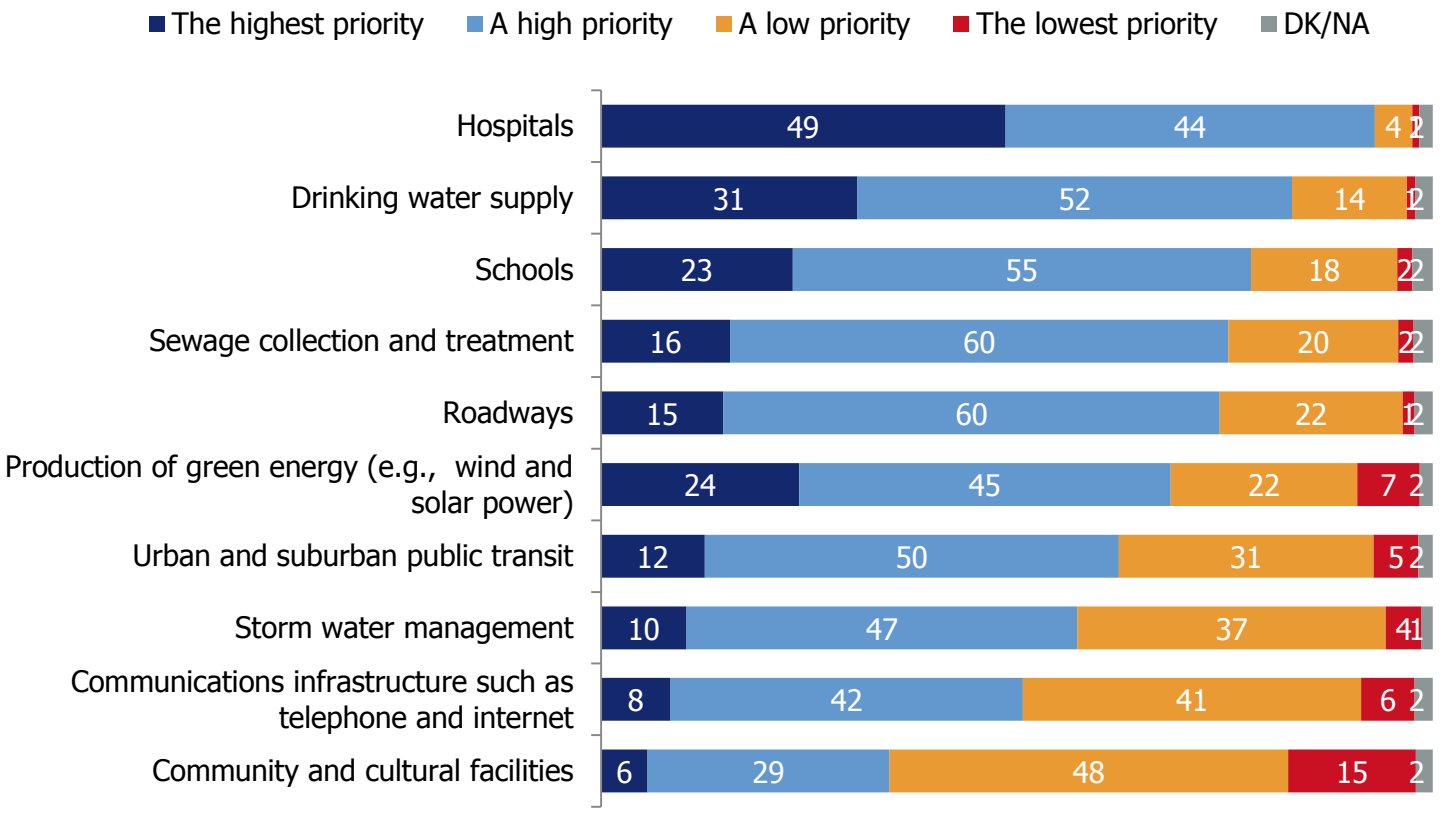
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Individual Canadians | 2 | 1 | 3 | 2 | 7 | 3 | 2 | 1 | 2 | 2 | 8 | 5 | 5 | 3 | 2 | 4 | 3 | 3 | 5 | 2 |
| Local / municipal government | 9 | 7 | 9 | 7 | 11 | 3 | 11 | 7 | 5 | 8 | 9 | 4 | 11 | 7 | 7 | 8 | 9 | 7 | 8 | 11 |
| Not for profit organizations | 2 | 2 | 1 | 3 | 1 | 0 | 1 | 3 | 1 | 2 | 2 | 0 | 4 | 1 | 1 | 2 | 2 | 2 | 3 | 2 |
| Provincial government | 13 | 11 | 14 | 12 | 5 | 9 | 14 | 10 | 19 | 11 | 7 | 10 | 14 | 11 | 7 | 8 | 13 | 10 | 10 | 12 |
| Federal government | 54 | 44 | 49 | 58 | 61 | 61 | 53 | 46 | 52 | 60 | 62 | 60 | 49 | 57 | 61 | 58 | 55 | 59 | 53 | 51 |
| Companies | 2 | 2 | 1 | 3 | 3 | 3 | 3 | 3 | 2 | 3 | 5 | 2 | 5 | 3 | 0 | 3 | 3 | 3 | 3 | 4 |
| Local Band Councils | 5 | 5 | 10 | 3 | 2 | 4 | 5 | 3 | 6 | 4 | 1 | 5 | 4 | 4 | 4 | 5 | 3 | 3 | 4 | 6 |
| Assembly of First Nations | 8 | 17 | 7 | 8 | 7 | 11 | 8 | 16 | 7 | 6 | 5 | 9 | 7 | 9 | 10 | 8 | 10 | 9 | 10 | 8 |
| Other (Please specify) | 4 | 9 | 7 | 3 | 1 | 5 | 2 | 9 | 6 | 3 | 1 | 6 | 2 | 3 | 6 | 4 | 3 | 4 | 5 | 3 |

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

Q. Who should be held most responsible for working to improve the quality of water on First Nations reserves in Canada? *Please select only one.*

# Canadians continue to feel that the drinking water supply one of the highest priorities for funding

## Priority Infrastructure Areas for Government Funding, 2017

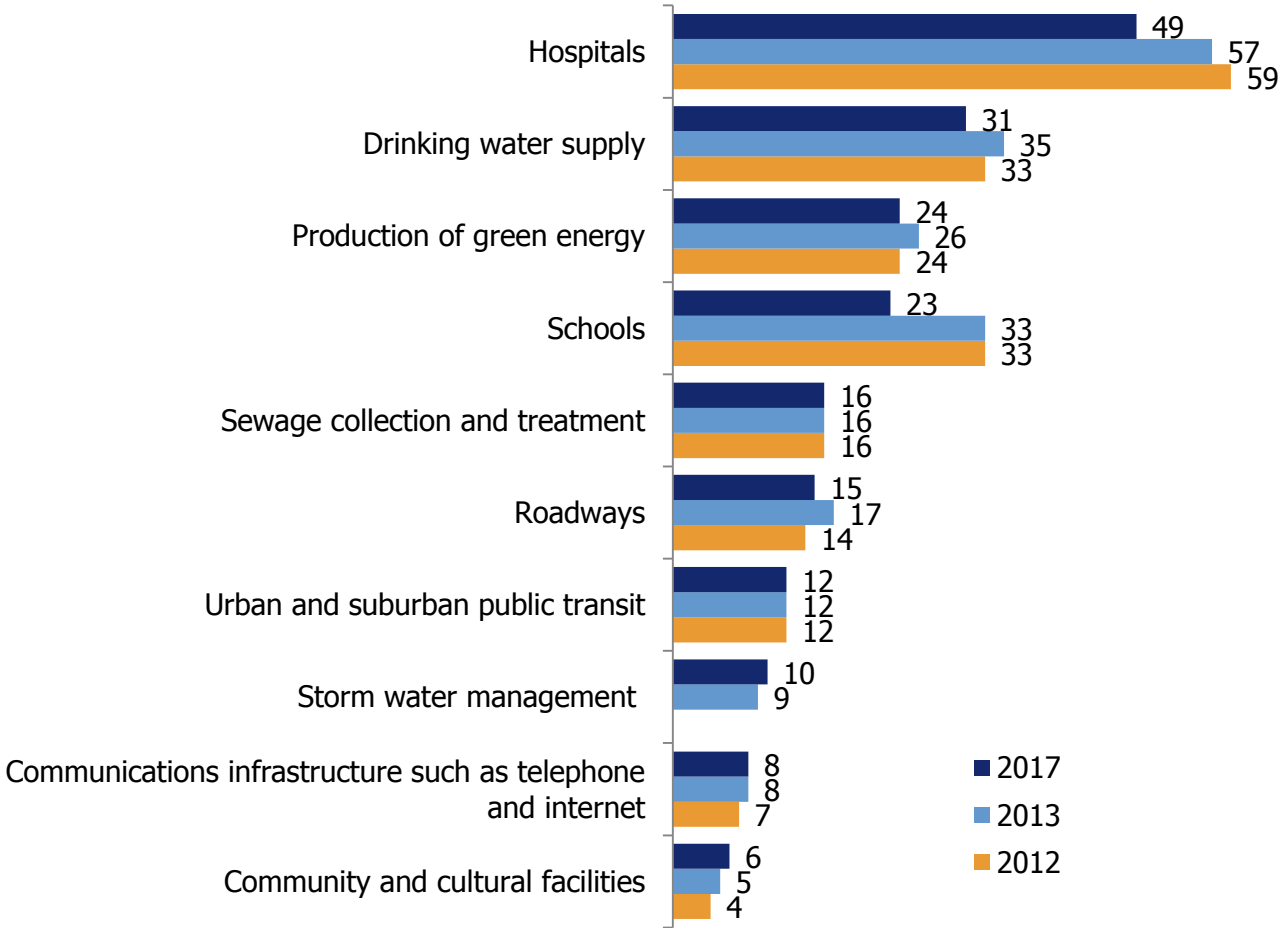



Base, All respondents 2017 *n*=2,017

Q. 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?

# While several infrastructure types have seen declines in perceptions as priority areas for funding, sewage collection and storm water management remain stable

## Priority Infrastructure Areas for Government Funding, "The Highest Priority," 2012–2017




Base: All respondents 2017 *n*=2,017, 2013, *n*=2,282, 2012 *n*=2,428

Q. 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?

# Priority Infrastructure Areas for Government Funding
# "The Highest Priority" and "A High Priority," Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18 to 34 years | 35 to 55 years | >55 years | Male | Female | Urban (>100 000) | Mid-size towns/cities | Rural (<1000) |
| Sewage collection and treatment | 78 | 72 | 80 | 74 | 75 | 81 | 76 | 74 | 76 | 72 | 75 | 73 | 72 | 76 | 78 | 75 | 76 | 74 | 72 | 85 |
| Drinking water supply | 86 | 79 | 87 | 86 | 78 | 86 | 83 | 82 | 88 | 84 | 79 | 86 | 81 | 82 | 86 | 81 | 85 | 84 | 81 | 83 |
| Roadways | 72 | 71 | 80 | 72 | 76 | 82 | 73 | 73 | 79 | 71 | 72 | 78 | 70 | 75 | 77 | 73 | 75 | 73 | 74 | 79 |
| Urban and suburban public transit | 71 | 56 | 42 | 68 | 61 | 52 | 77 | 62 | 51 | 79 | 66 | 66 | 65 | 61 | 61 | 4 | 61 | 70 | 51 | 48 |
| Production of green energy | 76 | 57 | 70 | 63 | 75 | 81 | 77 | 59 | 72 | 65 | 78 | 84 | 74 | 69 | 64 | 64 | 73 | 70 | 67 | 65 |
| Community and cultural facilities | 41 | 26 | 33 | 37 | 33 | 32 | 43 | 26 | 36 | 40 | 36 | 35 | 42 | 35 | 29 | 33 | 36 | 35 | 34 | 36 |
| Schools | 81 | 77 | 83 | 74 | 80 | 84 | 82 | 78 | 78 | 74 | 79 | 86 | 78 | 80 | 76 | 79 | 78 | 77 | 79 | 81 |
| Hospitals | 95 | 90 | 94 | 92 | 94 | 96 | 93 | 89 | 91 | 91 | 94 | 96 | 90 | 94 | 94 | 92 | 94 | 93 | 95 | 91 |
| Communications infrastructure such as telephone and internet | 52 | 45 | 46 | 55 | 48 | 51 | 50 | 47 | 47 | 53 | 48 | 55 | 51 | 51 | 50 | 53 | 49 | 49 | 52 | 57 |
| Storm water management | 57 | 56 | 59 | 58 | 55 | 63 | 60 | 61 | 60 | 59 | 53 | 56 | 55 | 58 | 58 | 55 | 60 | 58 | 52 | 63 |

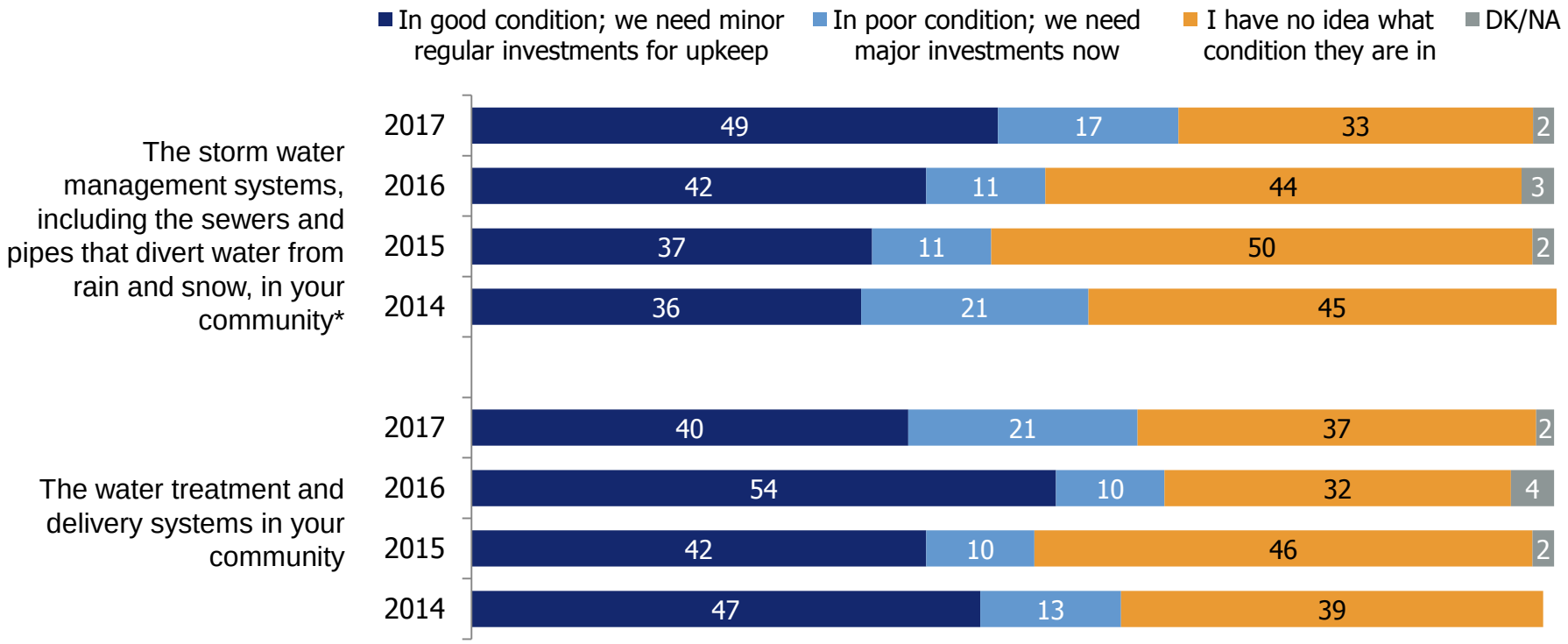
Base: All respondents 2017 *n*=2,017

Q. 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 in Canada?

# Canadians are more confident about the condition of the storm water management systems in their communities than in their water treatment and delivery systems

## Opinions about State of Water Treatment, Delivery and Storm Water Management Systems, 2014–2017

Around one in five Canadians feel that storm water management systems and water treatment and delivery systems require immediate major investment, with both seeing increases since 2016.




Base: Respondents who use municipal water supply, *n*=1,769, 2016 *n*=1,787, 2015 *n*=1,922, 2014 *n*=1,869

Q. Please indicate which one of the following is closest to your own opinion about.

*"The storm water management systems in my community" in 2016, 2015, 2014



2017 RBC Canadian Water Attitudes Study

# Opinions about State of Water Treatment, Delivery and Storm Water Management Systems, Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **The water treatment and delivery systems in your community** | | | | | | | | | | | | | | | | | | | | |
| In good condition—we need minor regular investments for upkeep | 47 | 65 | 44 | 49 | 40 | 55 | 56 | 66 | 42 | 48 | 34 | 45 | 47 | 49 | 49 | 54 | 43 | 48 | 57 | 30 |
| In poor condition—we need major investments now | 15 | 4 | 24 | 13 | 28 | 15 | 9 | 3 | 22 | 14 | 34 | 14 | 13 | 16 | 21 | 19 | 14 | 17 | 11 | 28 |
| I have no idea what condition they are in | 36 | 30 | 31 | 35 | 30 | 28 | 34 | 29 | 35 | 35 | 30 | 38 | 38 | 33 | 29 | 25 | 41 | 32 | 31 | 40 |
| **The storm water management systems in your community** | | | | | | | | | | | | | | | | | | | | |
| In good condition—we need minor regular investments for upkeep | 41 | 53 | 37 | 40 | 35 | 41 | 46 | 59 | 33 | 39 | 30 | 37 | 43 | 41 | 38 | 44 | 36 | 39 | 46 | 32 |
| In poor condition—we need major investments now | 16 | 9 | 26 | 20 | 29 | 24 | 11 | 8 | 34 | 22 | 34 | 22 | 13 | 20 | 29 | 24 | 18 | 22 | 18 | 23 |
| I have no idea what condition they are in | 42 | 34 | 36 | 38 | 35 | 33 | 40 | 30 | 33 | 38 | 35 | 38 | 43 | 37 | 32 | 30 | 44 | 37 | 34 | 44 |

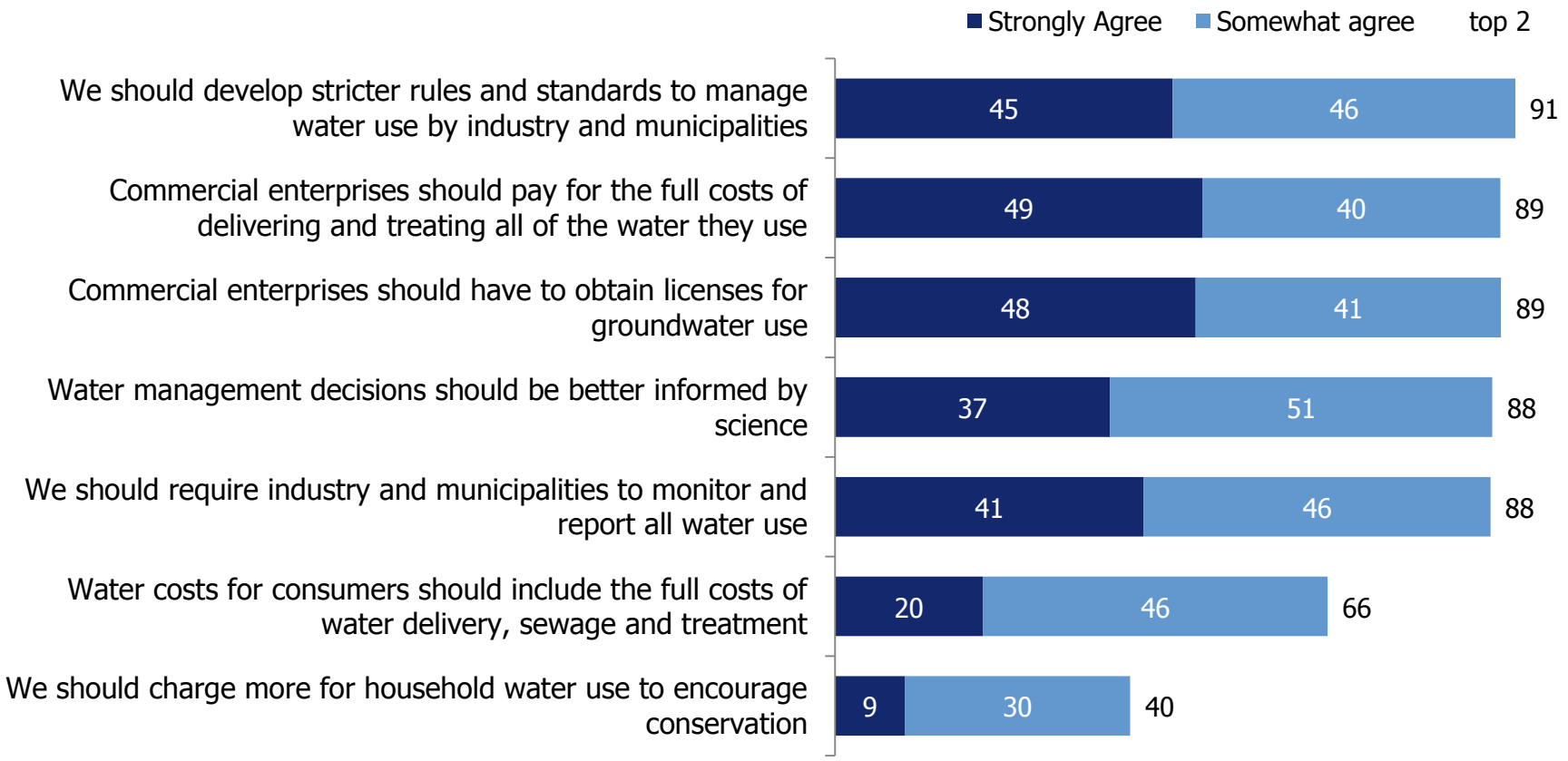


Base: All respondents 2017 *n*=1,769

Q. Please indicate which one of the following is closest to your own opinion about:

# While Canadians agree that there should be stricter rules for commercial enterprises and should pay for the full cost of their water use, they are much less likely to agree to higher charges for water use at the household level

## Methods of Protecting and Managing Fresh Water, "Strongly Agree" or "Somewhat Agree," 2017

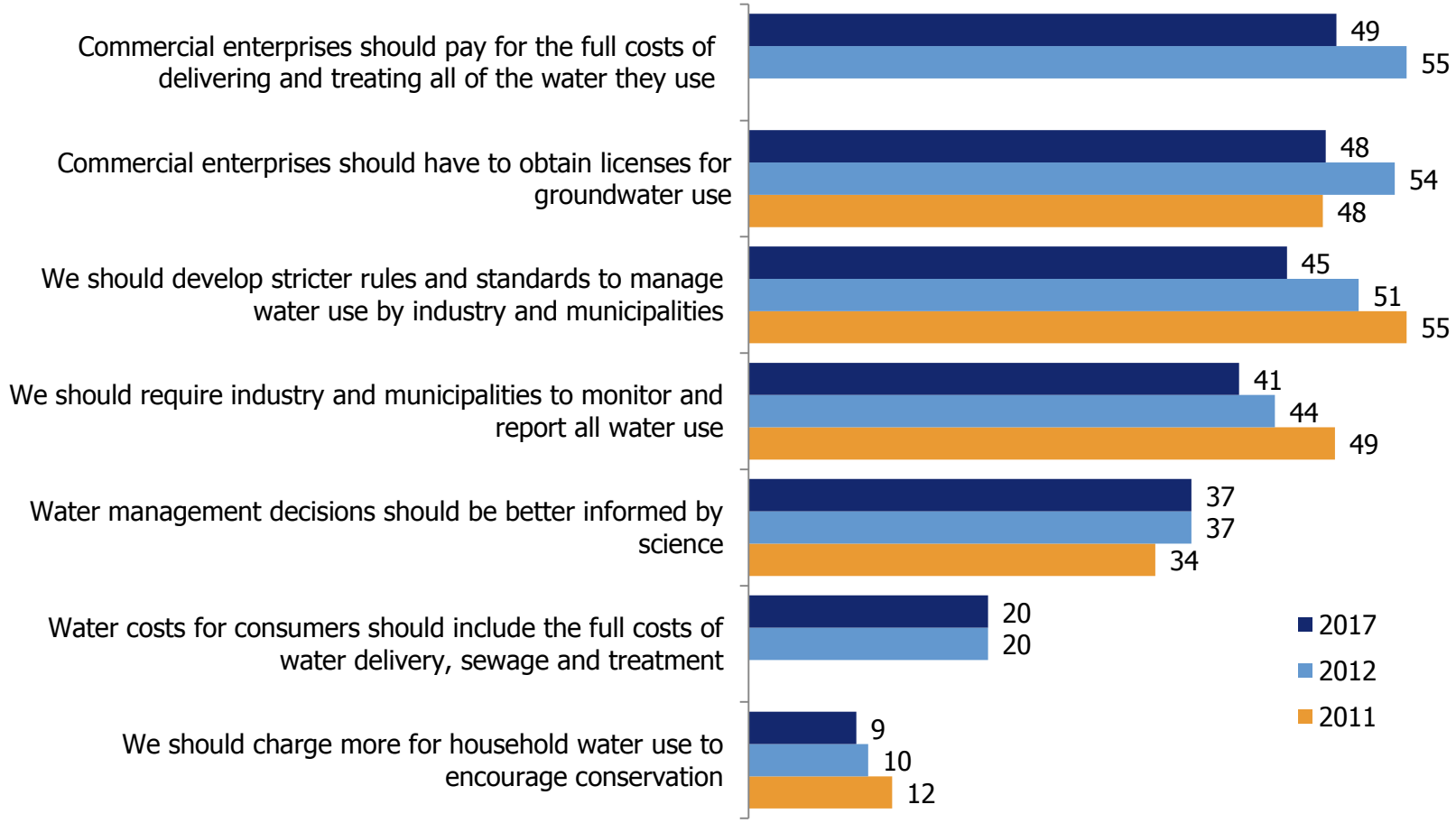



Base: All respondents 2017 *n*=2,017

Q. 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:

# While many Canadians agree that commercial enterprises need to be more accountable for the water they use, and that stricter rules and standards are needed, fewer strongly agree in 2017 than in the past

## Methods of Protecting and Managing Fresh Water, "Strongly Agree," 2011–2017




Base: All respondents 2017 *n*=2,017, 2012 *n*=2,428, 2011 *n*=2,066

Q. 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:

# Methods of Protecting and Managing Fresh Water
# "Strongly Agree" and "Somewhat Agree," Demographics, 2017

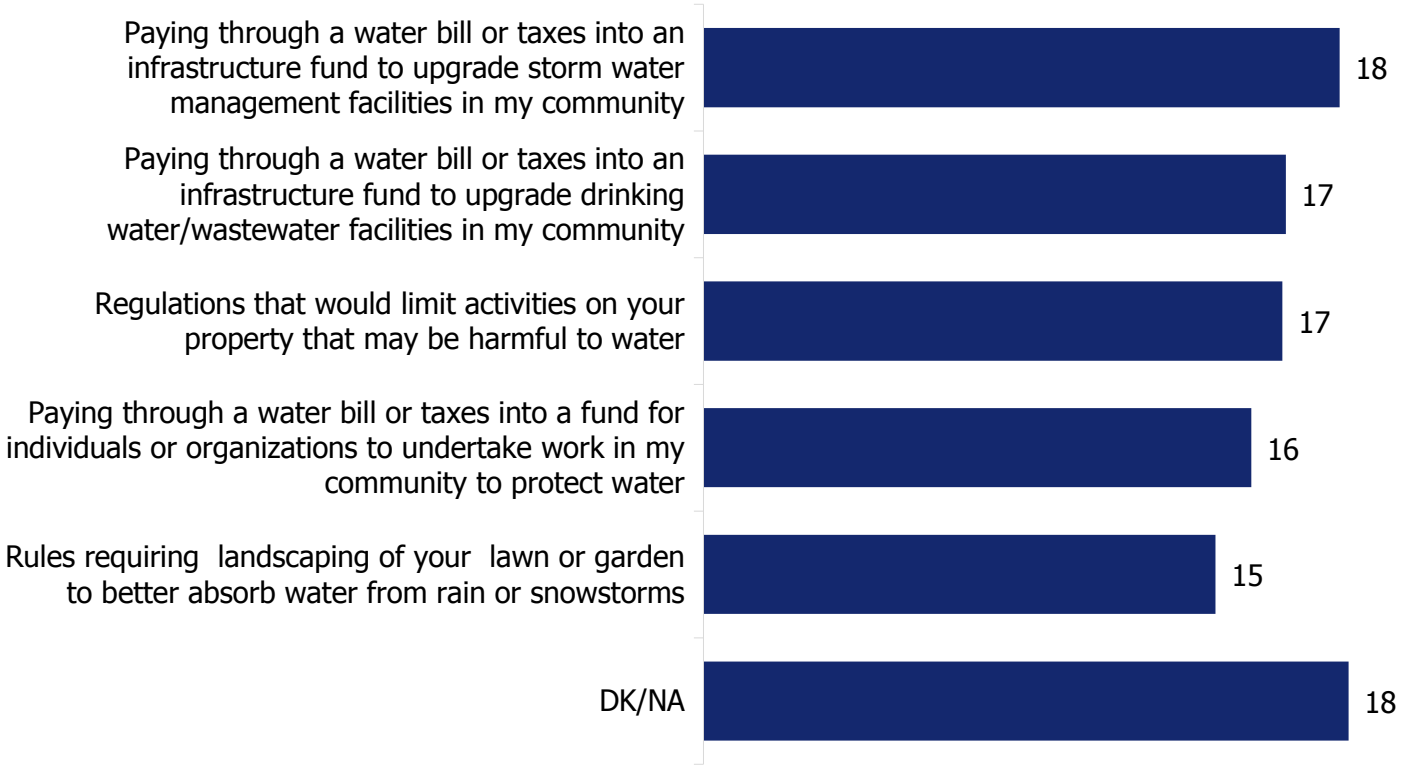
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| We should require industry and municipalities to monitor and report all water use | 89 | 83 | 82 | 88 | 89 | 89 | 90 | 87 | 84 | 89 | 89 | 86 | 84 | 89 | 89 | 89 | 86 | 88 | 87 | 85 |
| Commercial enterprises should have to obtain licenses for groundwater use | 90 | 86 | 88 | 89 | 90 | 91 | 91 | 89 | 89 | 89 | 88 | 93 | 85 | 90 | 92 | 89 | 89 | 90 | 86 | 87 |
| We should develop stricter rules and standards to manage water use by industry and municipalities | 90 | 86 | 89 | 91 | 94 | 93 | 90 | 87 | 90 | 93 | 93 | 94 | 86 | 94 | 92 | 91 | 91 | 91 | 91 | 90 |
| Water management decisions should be better informed by science | 91 | 82 | 90 | 90 | 85 | 92 | 90 | 85 | 91 | 89 | 84 | 92 | 88 | 87 | 89 | 89 | 87 | 89 | 86 | 85 |
| We should charge more for household water use to encourage conservation | 45 | 37 | 40 | 40 | 36 | 42 | 53 | 37 | 47 | 43 | 40 | 36 | 46 | 40 | 34 | 41 | 38 | 40 | 41 | 36 |
| Commercial enterprises should pay for the full costs of delivering and treating all of the water they use | 94 | 85 | 86 | 91 | 86 | 91 | 94 | 87 | 83 | 90 | 85 | 92 | 85 | 88 | 93 | 88 | 90 | 90 | 87 | 89 |
| Water costs for consumers should include the full costs of water delivery, sewage and treatment | 70 | 70 | 68 | 66 | 61 | 65 | 74 | 76 | 69 | 70 | 60 | 63 | 66 | 66 | 66 | 69 | 63 | 67 | 63 | 63 |

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

Q. 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:

# There is very little difference in acceptability among measures to help ensure safe water

## Most Acceptable Measures to Encourage People to Help Ensure Water Safety, Top Mentions "Most Acceptable," 2017




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

Q. (New 2017) Policy makers are considering ways to encourage people to help ensure the safety of drinking water and/or wastewater disposal for their homes. If you had to choose, please select three measures from the list below that would be the most acceptable to you personally. *Please click on up to three responses from the list and drag them to the top of the list in order of acceptability.*

# Most Acceptable Measures to Encourage People to Help Ensure Water Safety, Top Mentions "Most Acceptable," Demographics, 2017

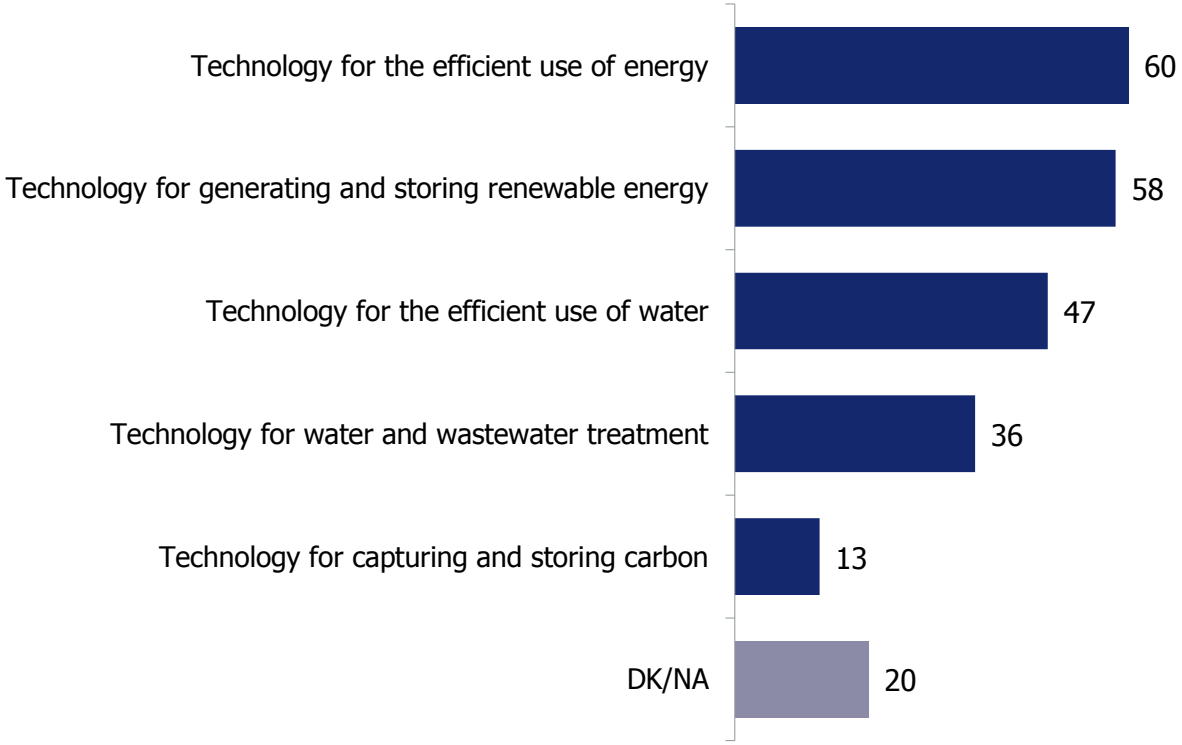
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Regulations that would limit activities on your property that may be harmful to water | 17 | 17 | 16 | 16 | 16 | 20 | 17 | 16 | 15 | 17 | 19 | 19 | 16 | 15 | 19 | 17 | 16 | 16 | 18 | 17 |
| Paying through a water bill or taxes into an infrastructure fund to upgrade drinking water/wastewater facilities in my community | 18 | 18 | 12 | 18 | 15 | 15 | 16 | 19 | 12 | 17 | 12 | 12 | 16 | 16 | 18 | 17 | 17 | 17 | 15 | 17 |
| Paying through a water bill or taxes into an infrastructure fund to upgrade storm water management facilities in my community | 19 | 17 | 19 | 19 | 17 | 18 | 20 | 18 | 21 | 20 | 17 | 19 | 21 | 15 | 19 | 18 | 19 | 19 | 16 | 19 |
| Paying through a water bill or taxes into a fund for individuals or organizations to undertake work in my community to protect water | 17 | 16 | 24 | 15 | 12 | 19 | 15 | 16 | 25 | 13 | 12 | 15 | 14 | 18 | 14 | 16 | 15 | 15 | 19 | 15 |
| Rules requiring landscaping of your lawn or garden to better absorb water from rain or snowstorms | 17 | 13 | 14 | 13 | 16 | 15 | 17 | 12 | 11 | 11 | 16 | 18 | 11 | 15 | 16 | 14 | 15 | 15 | 11 | 19 |

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

Q. (New 2017) Policy makers are considering ways to encourage people to help ensure the safety of drinking water and/or wastewater disposal for their homes. If you had to choose, please select three measures from the list below that would be the most acceptable to you personally. *Please click on up to three responses from the list and drag them to the top of the list in order of acceptability.*

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

## Most Important Technology Types for Canada to Invest in, Total Mentions, 2017




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

Q. (New in 2017) 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.

# Most Important Technology Types for Canada to Invest in, Demographics, 2017

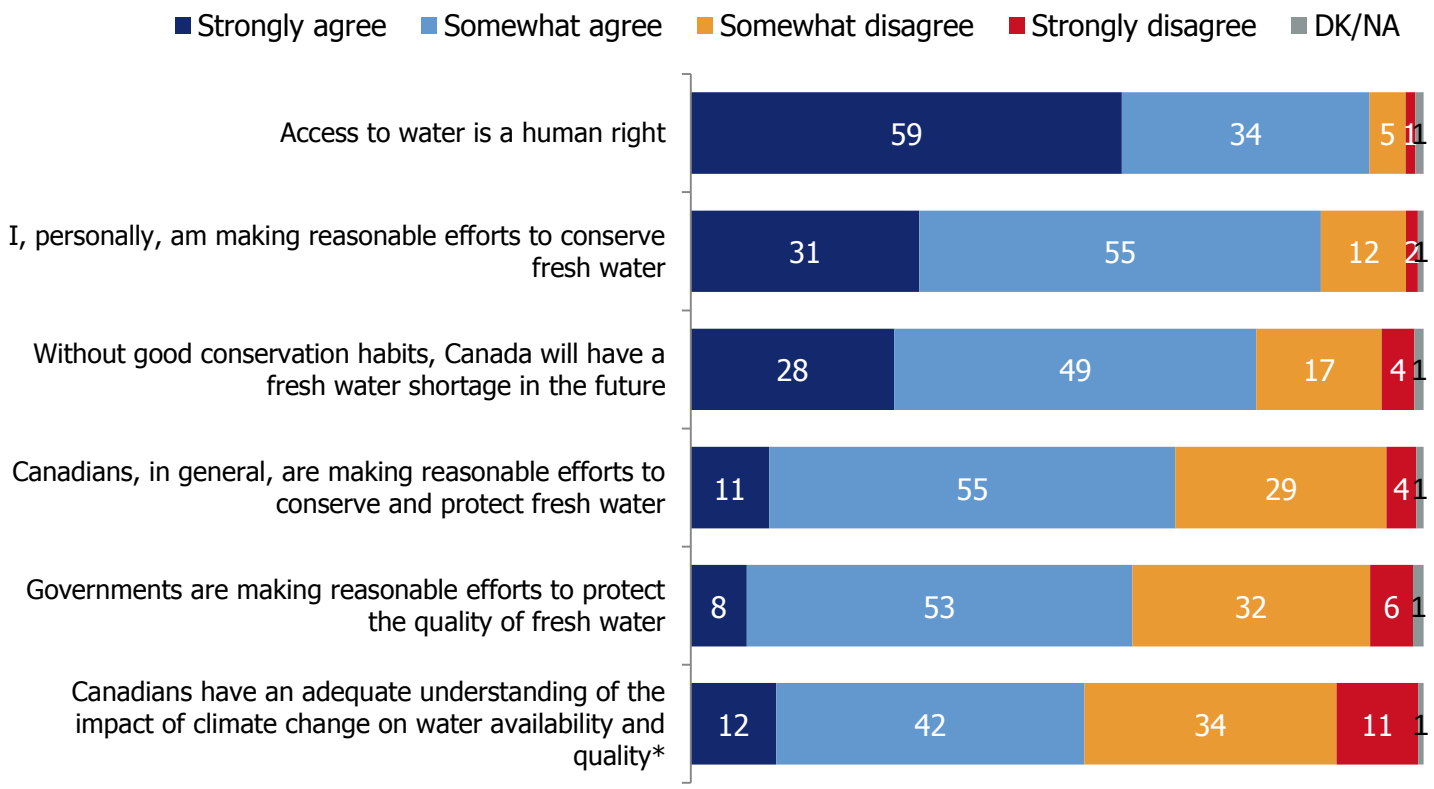
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Technology for the efficient use of water | 22 | 19 | 19 | 14 | 25 | 25 | 22 | 17 | 22 | 12 | 24 | 20 | 17 | 22 | 19 | 21 | 18 | 19 | 20 | 21 |
| Technology for generating and storing renewable energy | 27 | 21 | 26 | 28 | 20 | 31 | 24 | 20 | 25 | 29 | 20 | 28 | 28 | 23 | 25 | 23 | 27 | 24 | 25 | 30 |
| Technology for the efficient use of energy | 21 | 28 | 22 | 21 | 21 | 13 | 21 | 30 | 18 | 20 | 19 | 16 | 20 | 19 | 24 | 20 | 22 | 21 | 21 | 21 |
| Technology for water and wastewater treatment | 11 | 9 | 14 | 12 | 10 | 8 | 9 | 10 | 14 | 11 | 9 | 4 | 6 | 12 | 13 | 11 | 11 | 11 | 10 | 13 |
| Technology for capturing and storing carbon | 2 | 4 | 4 | 3 | 3 | 3 | 2 | 4 | 2 | 4 | 3 | 3 | 3 | 2 | 4 | 4 | 3 | 4 | 2 | 2 |

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

Q. (New in 2017) 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.

# A majority of Canadians strongly agree that access to water is a human right; Canadians personally feel they are making reasonable efforts to conserve fresh water, more than other Canadians in general

## Statements on Attitudes about Water Conservation, 2017



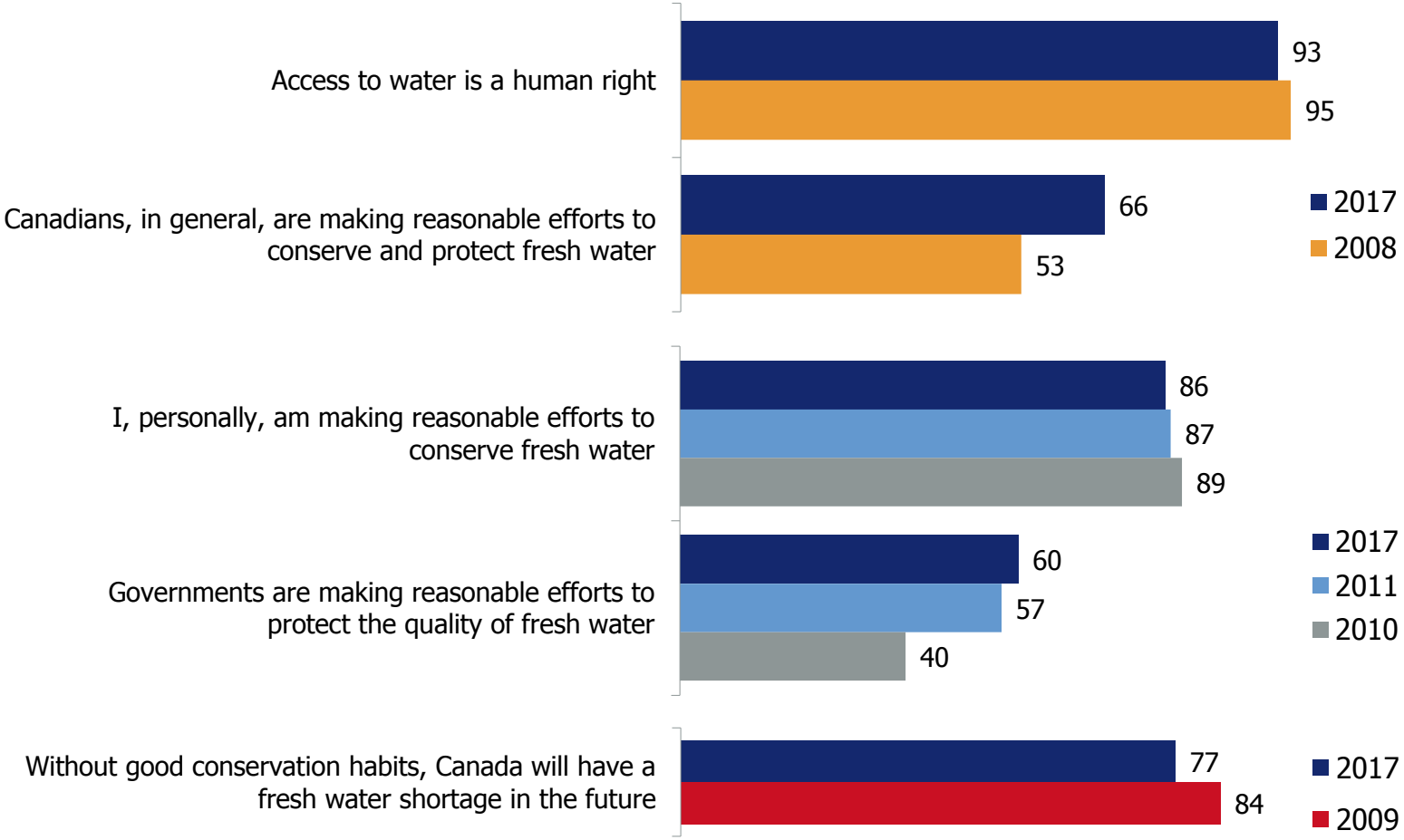

Base: All respondents 2017 *n*=2,017

*New in 2017

Q. To what extent do you agree or disagree with each of the following statements?

# In 2017, Canadians feel they and their governments are making more efforts to conserve and protect fresh water than in the past

## Statements on Attitudes about Water Conservation, "Strongly" and "Somewhat" Agree, 2008–2017

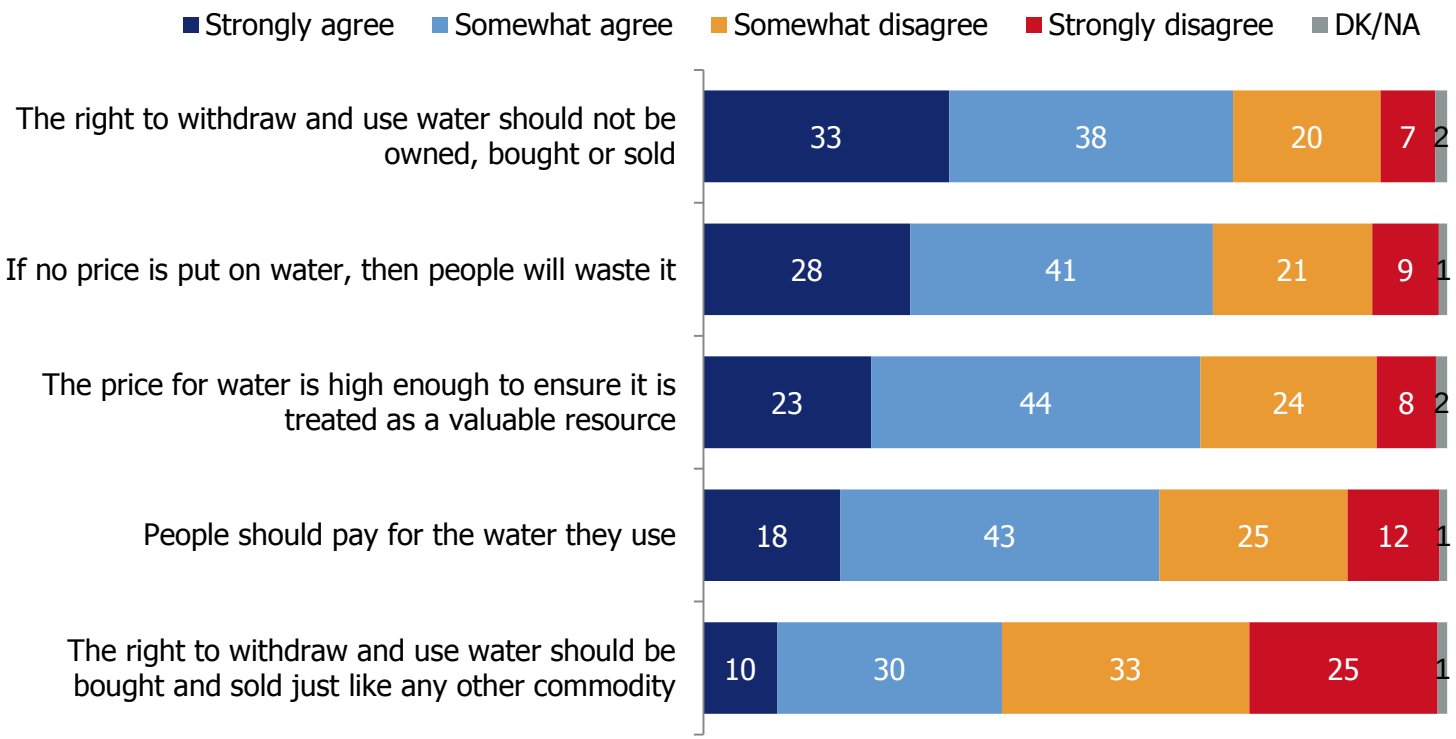



Base: All respondents 2017 *n*=2,017, 2011 *n*=2,066, 2009 *n*=2165, 2008 *n*=2,309

Q. To what extent do you agree or disagree with each of the following statements?

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

## Statements on Attitudes about Water Conservation, 2017



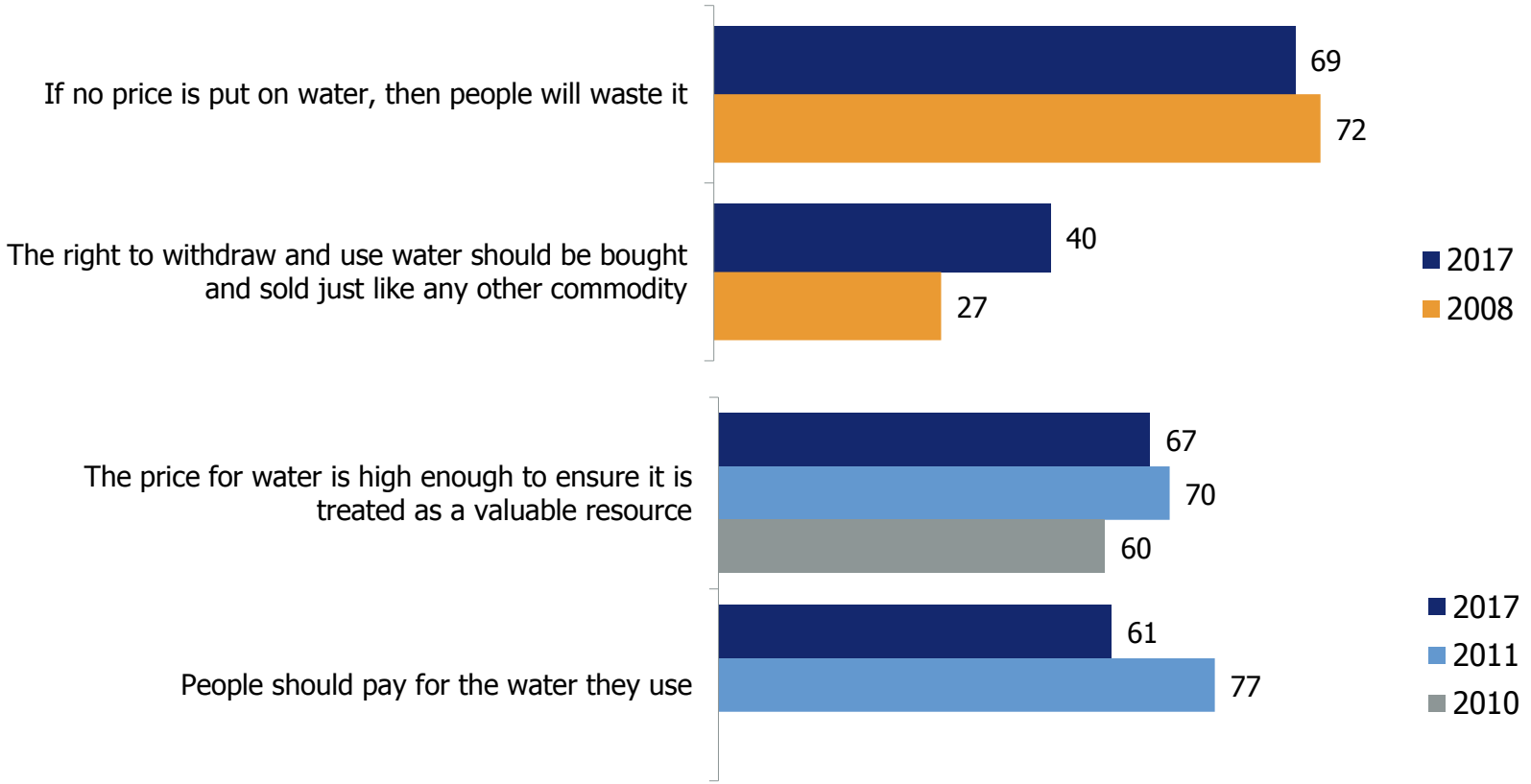

Base: All respondents 2017 *n*=2,017

*New in 2017

Q. To what extent do you agree or disagree with each of the following statements?

# Canadians are more open to the withdrawal and use of water as a commodity than in 2008, but they are less likely to agree that people should pay for the water they use

## Statements on Attitudes about Water Conservation, "Strongly" and "Somewhat" Agree, 2008–2017




Base: All respondents 2017 *n*=2,017, 2011 *n*=2,066, 2010 *n*=2,022, 2009 *n*=2165, 2008 *n*=2,309

Q. To what extent do you agree or disagree with each of the following statements?

# Statements on Attitudes about Water Conservation "Strongly" and "Somewhat" Agree, Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Canadians, in general, are making reasonable efforts to conserve and protect fresh water | 66 | 66 | 70 | 66 | 64 | 66 | 67 | 68 | 69 | 66 | 63 | 58 | 65 | 67 | 67 | 69 | 63 | 65 | 68 | 68 |
| I, personally, am making reasonable efforts to conserve fresh water | 88 | 86 | 87 | 85 | 87 | 87 | 86 | 86 | 86 | 84 | 87 | 79 | 79 | 86 | 91 | 85 | 87 | 85 | 85 | 91 |
| Governments are making reasonable efforts to protect the quality of fresh water | 60 | 62 | 67 | 61 | 55 | 64 | 65 | 65 | 63 | 63 | 54 | 59 | 58 | 61 | 61 | 63 | 58 | 62 | 55 | 60 |
| The price for water is high enough to ensure it is treated as a valuable resource | 61 | 69 | 66 | 68 | 66 | 71 | 61 | 73 | 65 | 67 | 64 | 67 | 58 | 69 | 72 | 66 | 68 | 67 | 69 | 65 |
| People should pay for the water they use | 60 | 72 | 67 | 68 | 47 | 57 | 65 | 76 | 74 | 71 | 54 | 63 | 61 | 58 | 65 | 63 | 59 | 65 | 61 | 45 |
| Without good conservation habits, Canada will have a fresh water shortage in the future | 81 | 66 | 75 | 80 | 76 | 81 | 81 | 69 | 76 | 79 | 75 | 80 | 80 | 76 | 75 | 73 | 81 | 78 | 80 | 72 |
| The right to withdraw and use water should be bought and sold just like any other commodity | 36 | 40 | 39 | 47 | 36 | 29 | 41 | 45 | 48 | 49 | 35 | 33 | 44 | 41 | 36 | 43 | 38 | 42 | 42 | 31 |



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

Q. To what extent do you agree or disagree with each of the following statements?

# Statements on Attitudes about Water Conservation "Strongly" and "Somewhat" Agree, Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| The right to withdraw and use water should not be owned, bought or sold | 73 | 67 | 71 | 70 | 70 | 82 | 73 | 66 | 70 | 72 | 70 | 82 | 74 | 70 | 70 | 71 | 72 | 71 | 73 | 72 |
| If no price is put on water, then people will waste it | 67 | 70 | 72 | 72 | 63 | 66 | 70 | 73 | 75 | 70 | 67 | 73 | 70 | 68 | 68 | 69 | 68 | 70 | 70 | 61 |
| Access to water is a human right | 95 | 89 | 90 | 93 | 94 | 90 | 94 | 88 | 88 | 94 | 94 | 90 | 93 | 92 | 93 | 92 | 93 | 92 | 93 | 93 |
| Canadians have an adequate understanding of the impact of climate change on water availability and quality | 48 | 53 | 50 | 57 | 55 | 48 | 52 | 56 | 50 | 55 | 52 | 47 | 53 | 56 | 51 | 56 | 52 | 52 | 57 | 57 |

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

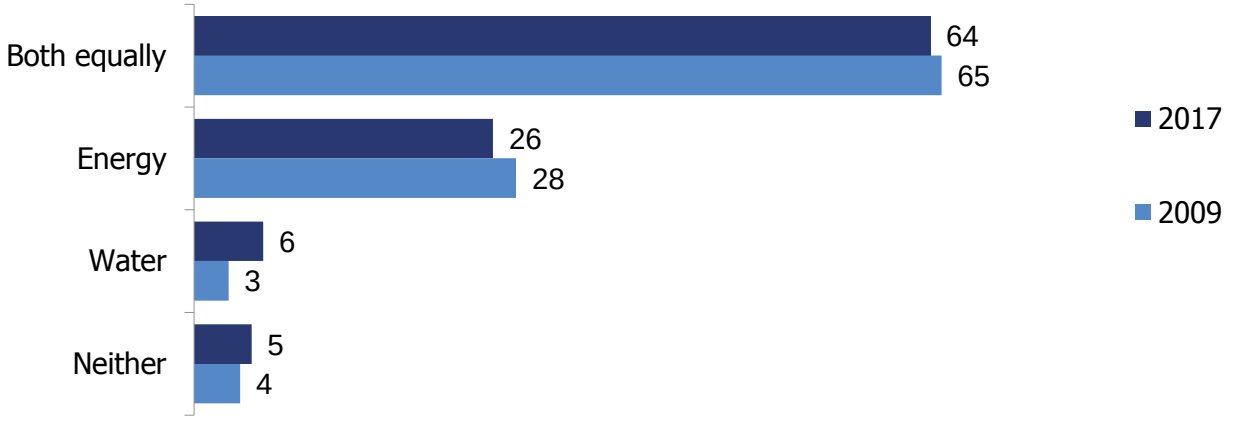
Q. To what extent do you agree or disagree with each of the following statements?

# Consumer Behaviour

2017
RBC Canadian Water Attitudes Study

# A majority of Canadians say they put effort into reducing both energy and water consumption equally; a quarter say they put more effort into saving energy than water

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




| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Both equally | 64 | 66 | 75 | 67 | 60 | 52 | 64 | 64 | 76 | 62 | 60 | 50 | 50 | 66 | 72 | 60 | 68 | 64 | 64 | 65 |
| Water | 8 | 4 | 6 | 4 | 8 | 3 | 9 | 6 | 7 | 4 | 8 | 3 | 9 | 6 | 2 | 6 | 5 | 6 | 5 | 6 |
| Energy | 23 | 22 | 13 | 25 | 28 | 42 | 23 | 23 | 11 | 27 | 27 | 43 | 32 | 24 | 23 | 29 | 22 | 25 | 28 | 23 |
| Neither | 5 | 8 | 5 | 5 | 4 | 3 | 3 | 6 | 6 | 7 | 4 | 4 | 9 | 4 | 3 | 5 | 5 | 5 | 3 | 6 |

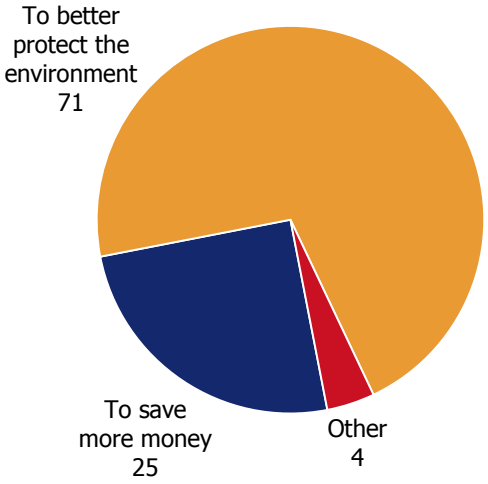
Base: All respondents 2017 *n*=2,017, 2009 *n*=2,165

Q. 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 saving water tend to do so to better protect the environment, while those who put more effort into energy conservation are more likely to do it to save money

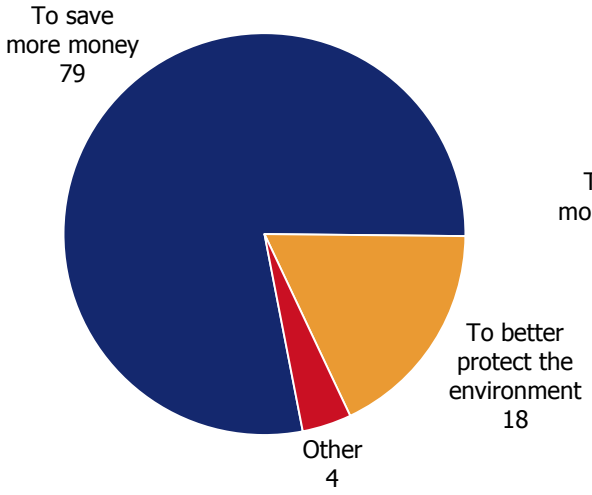
## Reasons for Saving Energy, Water or Both, 2017

### Water



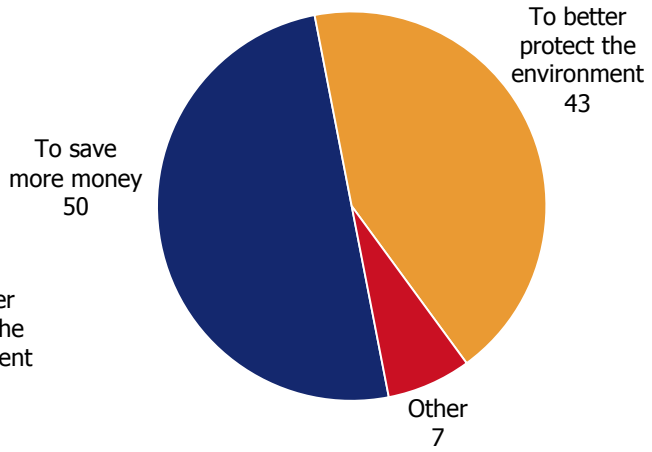

Base: Water *n*=111

### Energy




Base: Energy *n*=512

### Both



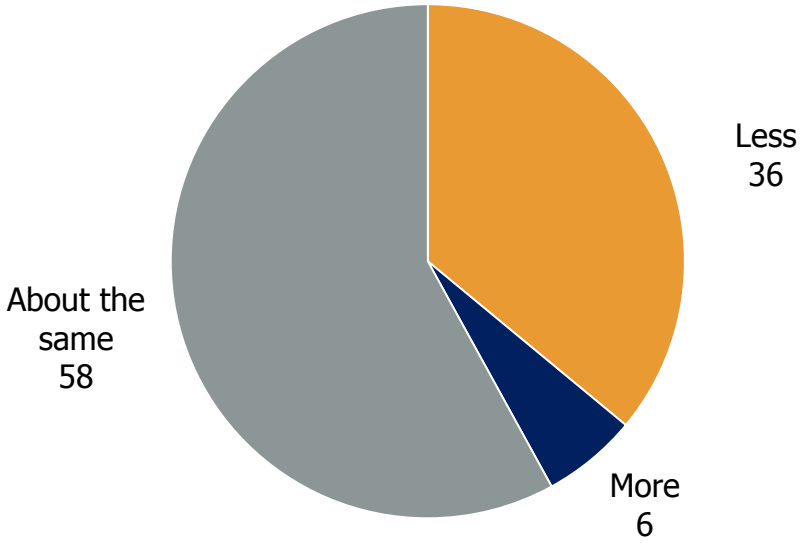

Base: Both *n*=1,280



Q. 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.*

# Six in ten Canadians say they consume the same amount of bottled water compared with one year ago, while over one-third consume less

## Bottled Water Consumption Compared with Past Year, 2017




Almost one half in British Columbia (48%), and specifically in Vancouver (49%), say they consume less bottled water. Women (40%) are more likely to say they consume less bottled water than men (31%).

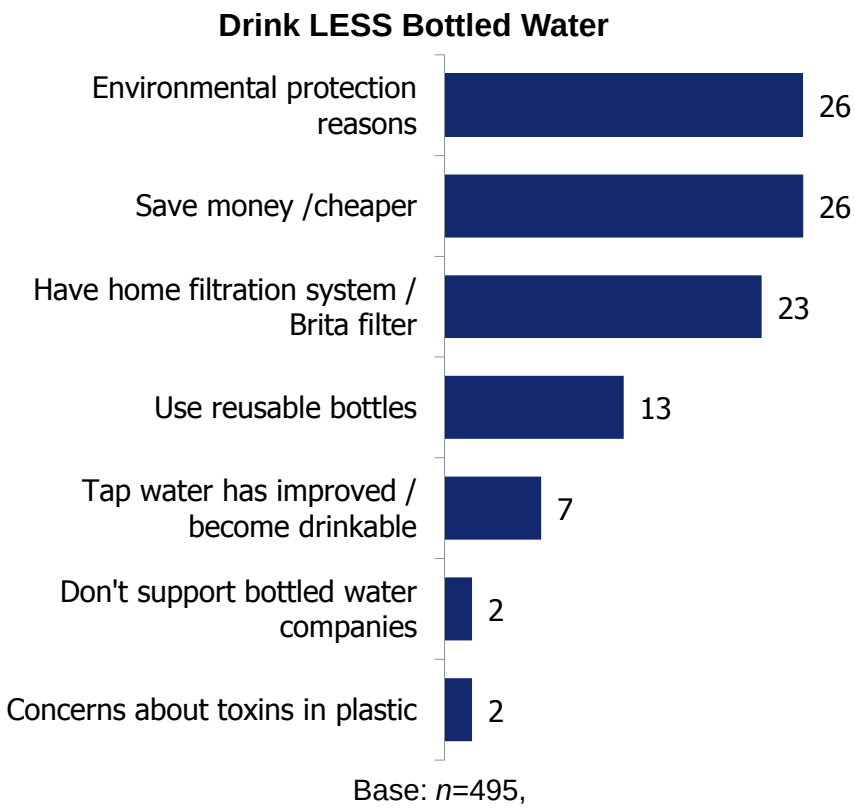
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| About the same | 49 | 56 | 59 | 62 | 59 | 55 | 47 | 58 | 59 | 62 | 61 | 55 | 56 | 62 | 56 | 62 | 55 | 57 | 59 | 62 |
| More | 3 | 4 | 8 | 5 | 8 | 10 | 4 | 4 | 7 | 7 | 9 | 8 | 5 | 6 | 6 | 7 | 6 | 7 | 4 | 6 |
| Less | 48 | 40 | 33 | 32 | 33 | 35 | 49 | 38 | 33 | 31 | 30 | 38 | 39 | 32 | 37 | 31 | 40 | 36 | 37 | 33 |

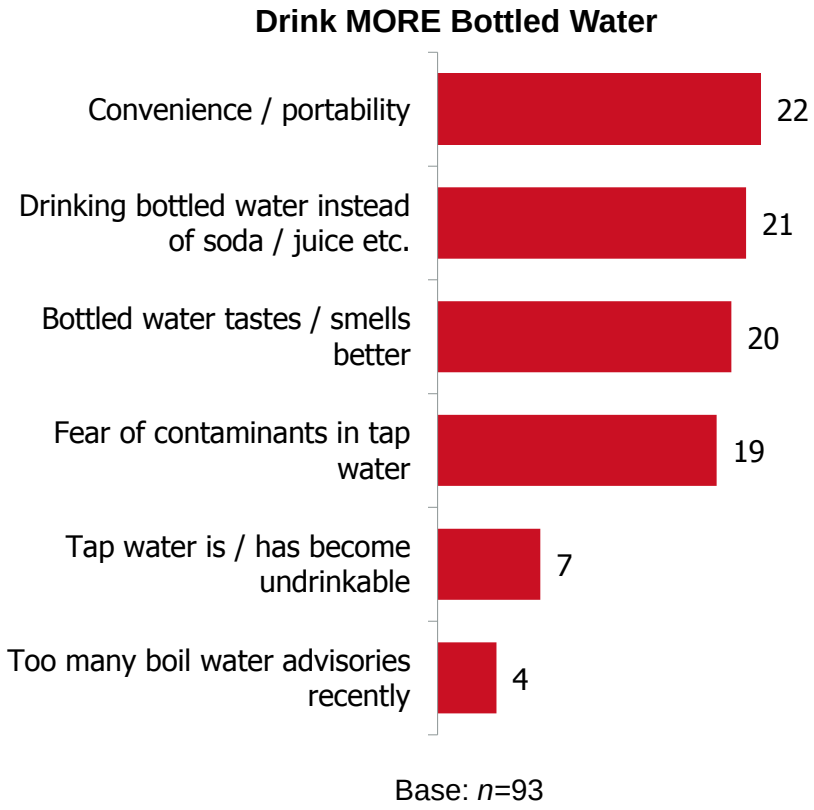
Base: All respondents 2017 *n*=2,017

Q. Compared with one year ago, would you say you now consume more, less or about the same amount of bottled water? *Please select only one*.

# Canadians who are drinking less bottle water do so to reduce waste or save money. Canadians who are drinking more bottled water tend to do so out of convenience

## Reasons for Drinking Less/More Bottled Water than a Year Ago, Total Mentions, Unprompted, 2017



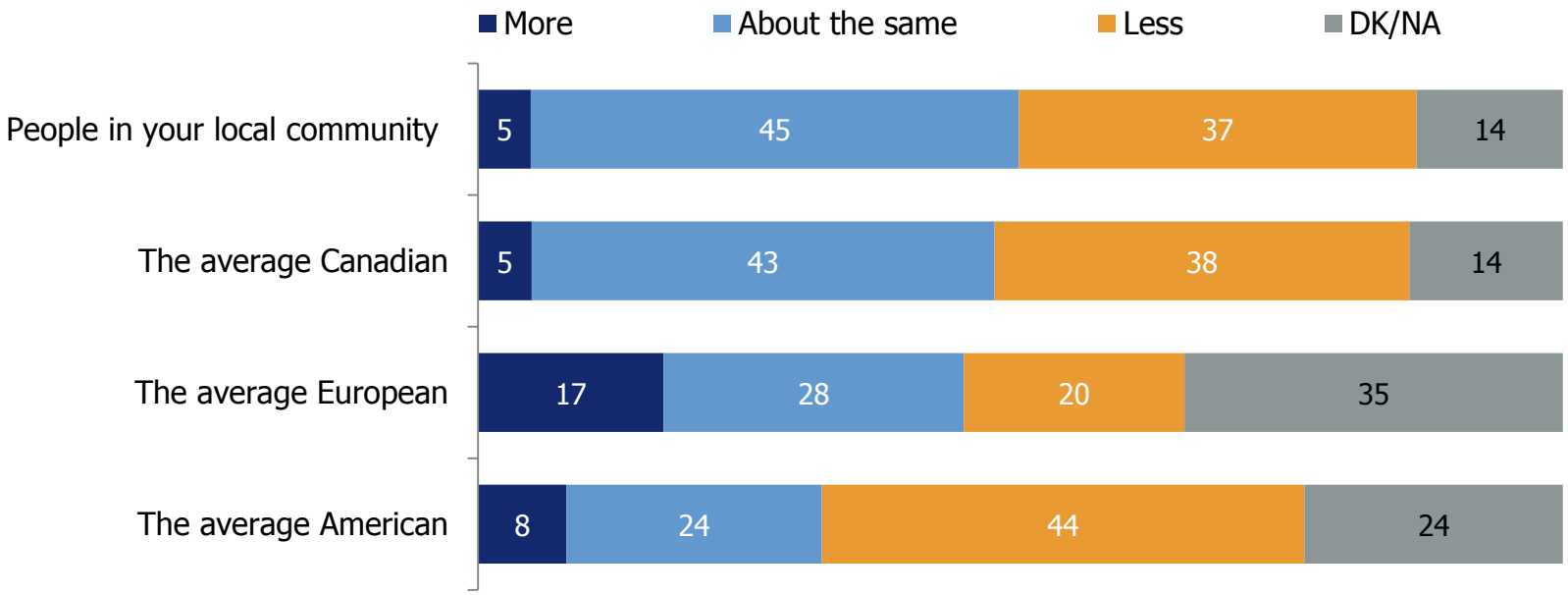






Q. Why do you now drink [more/less] bottled water than you did one year ago?

# Canadians perceive that they use about the same amount or less water than people in their local community and the average Canadian

## Comparison of Perceptions of Personal Water Use, 2017




Although around one-quarter of Canadians feel that their water use is about the same as the average European and the average American, there is a perception among Canadians that they use slightly more water than Europeans and significantly less water than Americans.

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

Q. (New 2017) Do you think you personally use more, about the same amount, or less water than each of the following during a typical day?

# Comparison of Perceptions of Personal Water Use, Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **People in your local community** | | | | | | | | | | | | | | | | | | | | |
| More | 7 | 5 | 5 | 5 | 4 | 5 | 4 | 5 | 6 | 6 | 6 | 3 | 6 | 5 | 5 | 7 | 3 | 5 | 5 | 4 |
| About the same | 46 | 43 | 45 | 45 | 45 | 44 | 44 | 43 | 44 | 47 | 41 | 41 | 50 | 45 | 41 | 46 | 44 | 44 | 50 | 42 |
| Less | 34 | 37 | 38 | 35 | 39 | 40 | 36 | 36 | 36 | 29 | 39 | 44 | 32 | 36 | 41 | 36 | 38 | 35 | 33 | 47 |
| Don't know | 13 | 15 | 12 | 15 | 12 | 11 | 15 | 16 | 14 | 17 | 13 | 11 | 12 | 15 | 13 | 11 | 15 | 16 | 12 | 8 |
| **The average Canadian** | | | | | | | | | | | | | | | | | | | | |
| More | 7 | 5 | 7 | 5 | 3 | 6 | 7 | 4 | 10 | 6 | 4 | 5 | 6 | 5 | 4 | 6 | 4 | 5 | 6 | 5 |
| About the same | 37 | 42 | 39 | 46 | 43 | 38 | 39 | 46 | 41 | 49 | 45 | 36 | 49 | 42 | 39 | 44 | 42 | 44 | 45 | 34 |
| Less | 41 | 37 | 40 | 34 | 42 | 42 | 40 | 34 | 36 | 28 | 39 | 41 | 33 | 37 | 44 | 38 | 38 | 35 | 36 | 53 |
| Don't know | 15 | 15 | 15 | 15 | 12 | 14 | 14 | 16 | 13 | 17 | 12 | 17 | 12 | 16 | 13 | 11 | 17 | 16 | 13 | 9 |
| **The average American** | | | | | | | | | | | | | | | | | | | | |
| More | 9 | 9 | 9 | 8 | 7 | 6 | 7 | 8 | 13 | 9 | 10 | 8 | 10 | 7 | 9 | 10 | 6 | 9 | 8 | 6 |
| About the same | 21 | 21 | 20 | 26 | 23 | 22 | 26 | 23 | 22 | 30 | 25 | 22 | 27 | 26 | 18 | 26 | 21 | 24 | 25 | 18 |
| Less | 48 | 45 | 41 | 38 | 52 | 50 | 47 | 43 | 38 | 33 | 49 | 46 | 44 | 43 | 46 | 45 | 44 | 42 | 44 | 54 |
| Don't know | 22 | 24 | 29 | 28 | 18 | 22 | 20 | 27 | 28 | 28 | 16 | 24 | 19 | 24 | 27 | 19 | 29 | 24 | 23 | 22 |

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

Q. (New 2017) Do you think you personally use more, about the same amount, or less water than each of the following during a typical day?

# Comparison of Perceptions of Personal Water Use, Demographics, 2017

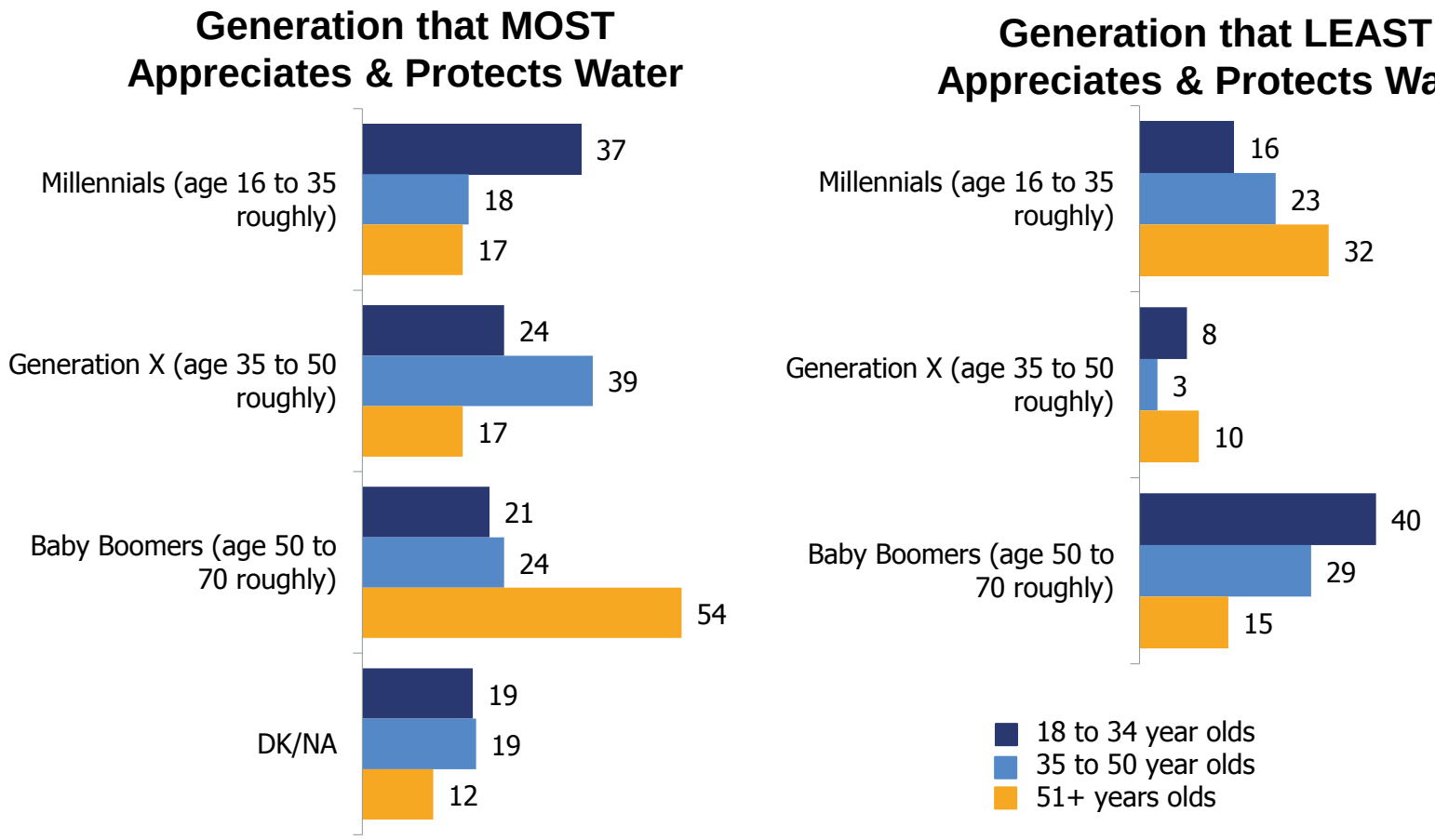
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **The average European** | | | | | | | | | | | | | | | | | | | | |
| More | 17 | 14 | 18 | 17 | 19 | 17 | 17 | 15 | 19 | 17 | 23 | 20 | 15 | 15 | 20 | 19 | 15 | 19 | 14 | 12 |
| About the same | 24 | 28 | 17 | 27 | 33 | 28 | 27 | 31 | 24 | 30 | 31 | 24 | 33 | 29 | 22 | 30 | 26 | 29 | 28 | 23 |
| Less | 22 | 18 | 19 | 17 | 24 | 23 | 22 | 14 | 19 | 16 | 23 | 21 | 20 | 22 | 18 | 22 | 19 | 18 | 23 | 27 |
| Don't know | 37 | 40 | 46 | 38 | 24 | 32 | 34 | 41 | 38 | 37 | 23 | 34 | 31 | 34 | 39 | 29 | 41 | 34 | 35 | 38 |

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

Q. (New 2017) Do you think you personally use more, about the same amount, or less water than each of the following during a typical day?

# Each generation perceives themselves as helping the most to protect Canada's water resources; younger respondents say Boomers are the least likely to protect water, and vice versa

## Generation that Appreciates and Helps the Most/Least to Protect Canada's Water Resources, 2017




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

Q. (New 2017) Please rank the following generations in terms of how much each generally appreciates and helps protect Canada's water resources. *Please click and drag for each generation*.

# Generation that Appreciates and Helps the Most/Least to Protect Canada's Water Resources, Demographics, 2017

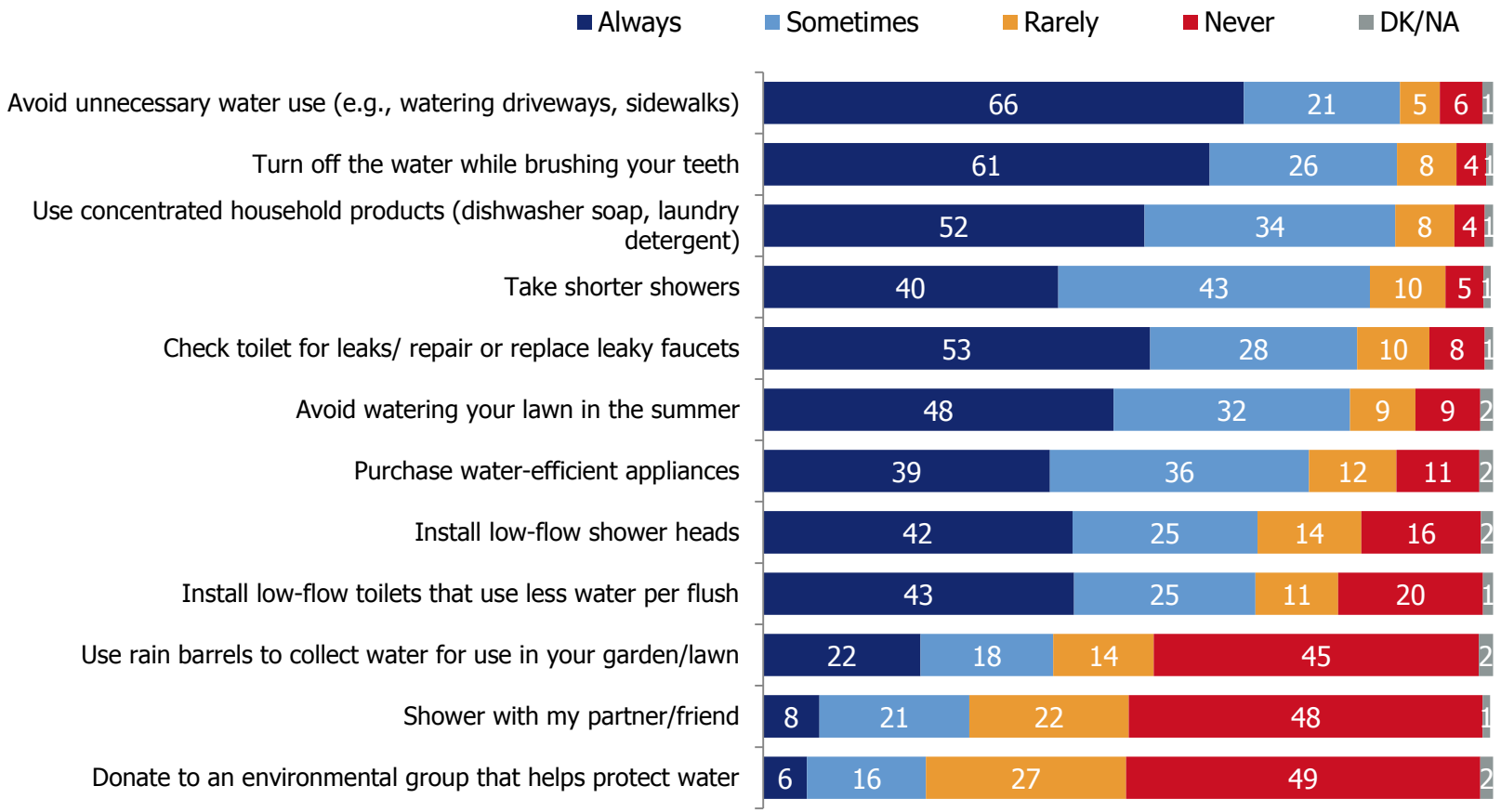
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **Generation that MOST appreciates and protects water** | | | | | | | | | | | | | | | | | | | | |
| Millennials (age 16 to 35 roughly) | 24 | 22 | 19 | 19 | 31 | 13 | 22 | 22 | 23 | 23 | 32 | 19 | 38 | 19 | 15 | 23 | 22 | 23 | 22 | 22 |
| Generation X (age 35 to 50 roughly) | 22 | 23 | 28 | 24 | 25 | 28 | 24 | 20 | 21 | 23 | 25 | 32 | 22 | 34 | 15 | 25 | 23 | 25 | 26 | 22 |
| Baby Boomers (age 50 to 70 roughly) | 41 | 40 | 41 | 41 | 26 | 47 | 38 | 42 | 40 | 37 | 24 | 35 | 21 | 28 | 61 | 37 | 39 | 37 | 35 | 44 |
| DK/NA | 13 | 15 | 12 | 16 | 19 | 12 | 16 | 15 | 16 | 17 | 19 | 13 | 19 | 19 | 9 | 15 | 16 | 16 | 18 | 12 |
| **Generation that LEAST appreciates and protects water** | | | | | | | | | | | | | | | | | | | | |
| Millennials (age 16 to 35 roughly) | 25 | 25 | 28 | 29 | 15 | 37 | 27 | 26 | 27 | 26 | 15 | 29 | 17 | 24 | 33 | 26 | 24 | 26 | 24 | 25 |
| Generation X (age 35 to 50 roughly) | 10 | 8 | 6 | 7 | 6 | 12 | 11 | 9 | 4 | 7 | 6 | 9 | 8 | 4 | 11 | 7 | 8 | 7 | 7 | 12 |
| Baby Boomers (age 50 to 70 roughly) | 24 | 24 | 29 | 23 | 34 | 15 | 21 | 23 | 29 | 24 | 35 | 27 | 40 | 27 | 13 | 28 | 24 | 27 | 25 | 21 |

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

Q. (New 2017) Please rank the following generations in terms of how much each generally appreciates and helps protect Canada's water resources. *Please click and drag for each generation*.

# Most frequent conservation habits are avoiding unnecessary water use and turning off the water while brushing teeth

## Frequency of Actions to Help Conserve Fresh Water, 2017




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

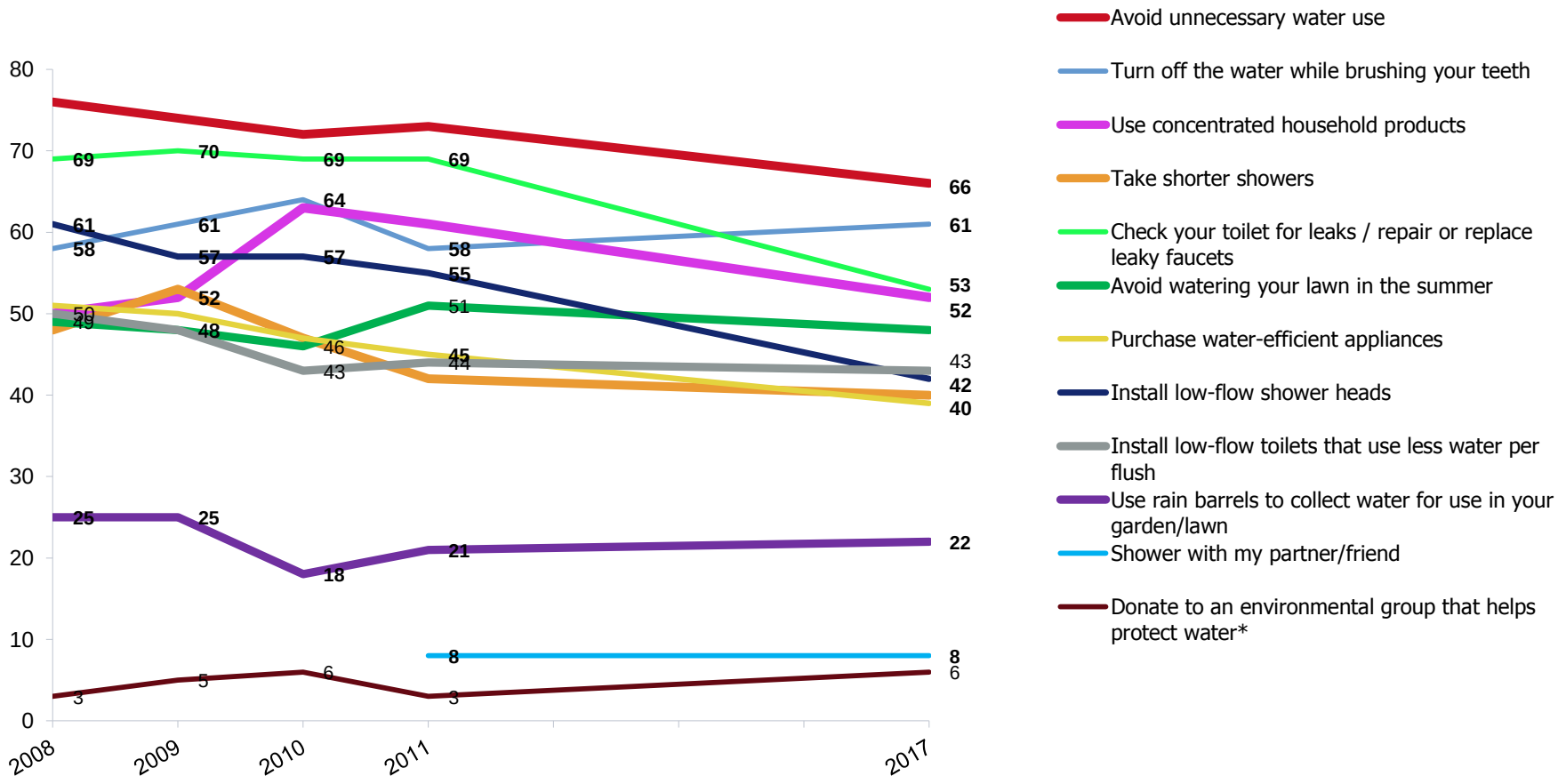
Q. What do you do to help conserve fresh water, and how often, if at all?



2017 RBC Canadian Water Attitudes Study

# Canadians are less likely to say they are doing actions to conserve water than in the past, with the exception of turning the water off while they brush their teeth

## Frequency of Actions to Help Conserve Fresh Water, "Always," 2008–2017



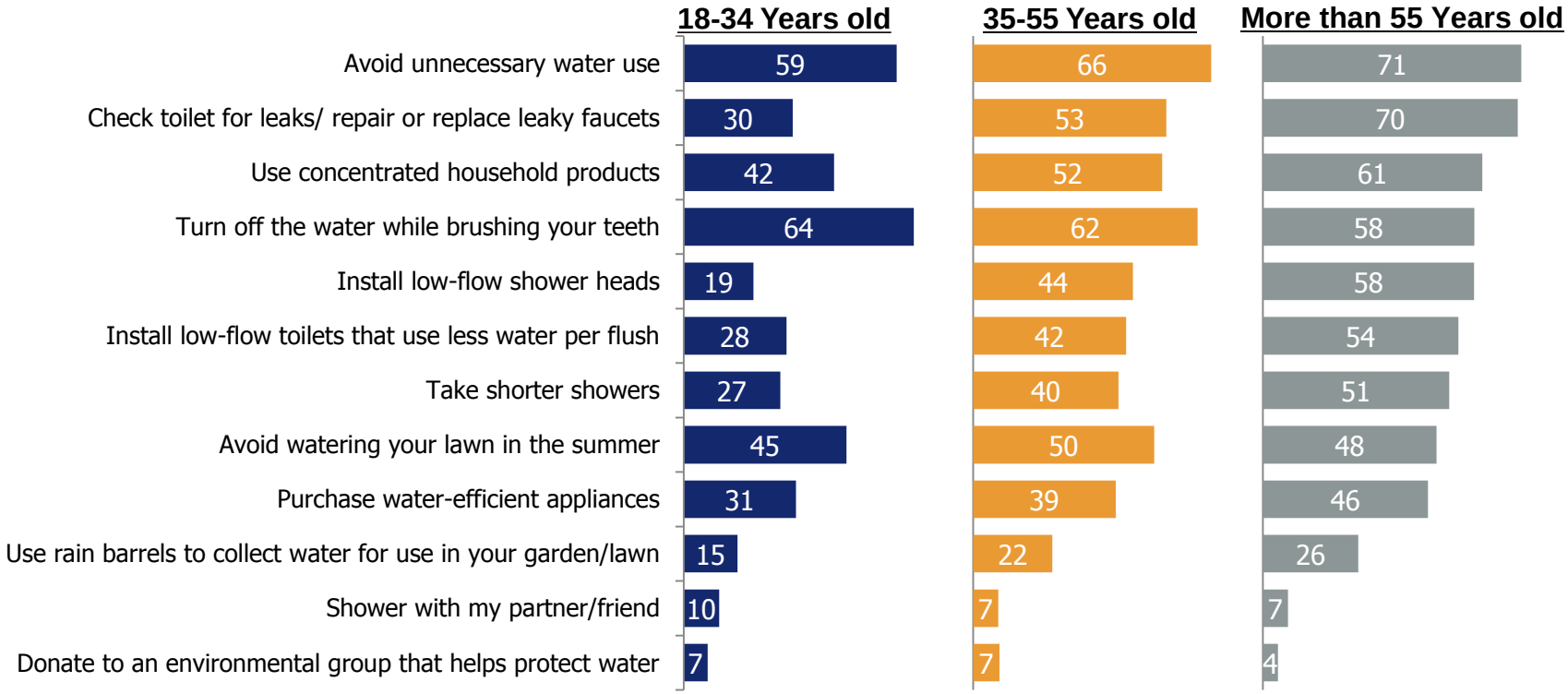

Base: All respondents 2017 *n*=2,017, 2011 *n*=2,066, 2010 *n*=2,022; 2009 *n*=2,165, 2008 *n*=2,309

Q. What do you do to help conserve fresh water, and how often, if at all?

*" Donate to a registered water charity" from 2008 to 2010

# Older respondents are more likely to say they "always" take certain actions to conserve fresh water, particularly those related to home repairs and ownership

## Frequency of Actions to Help Conserve Fresh Water, "Always," by Age Group, 2017




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

Q. What do you do to help conserve fresh water, and how often, if at all?

# Frequency of Actions to Help Conserve Fresh Water "Always" and "Sometimes," Demographics, 2017

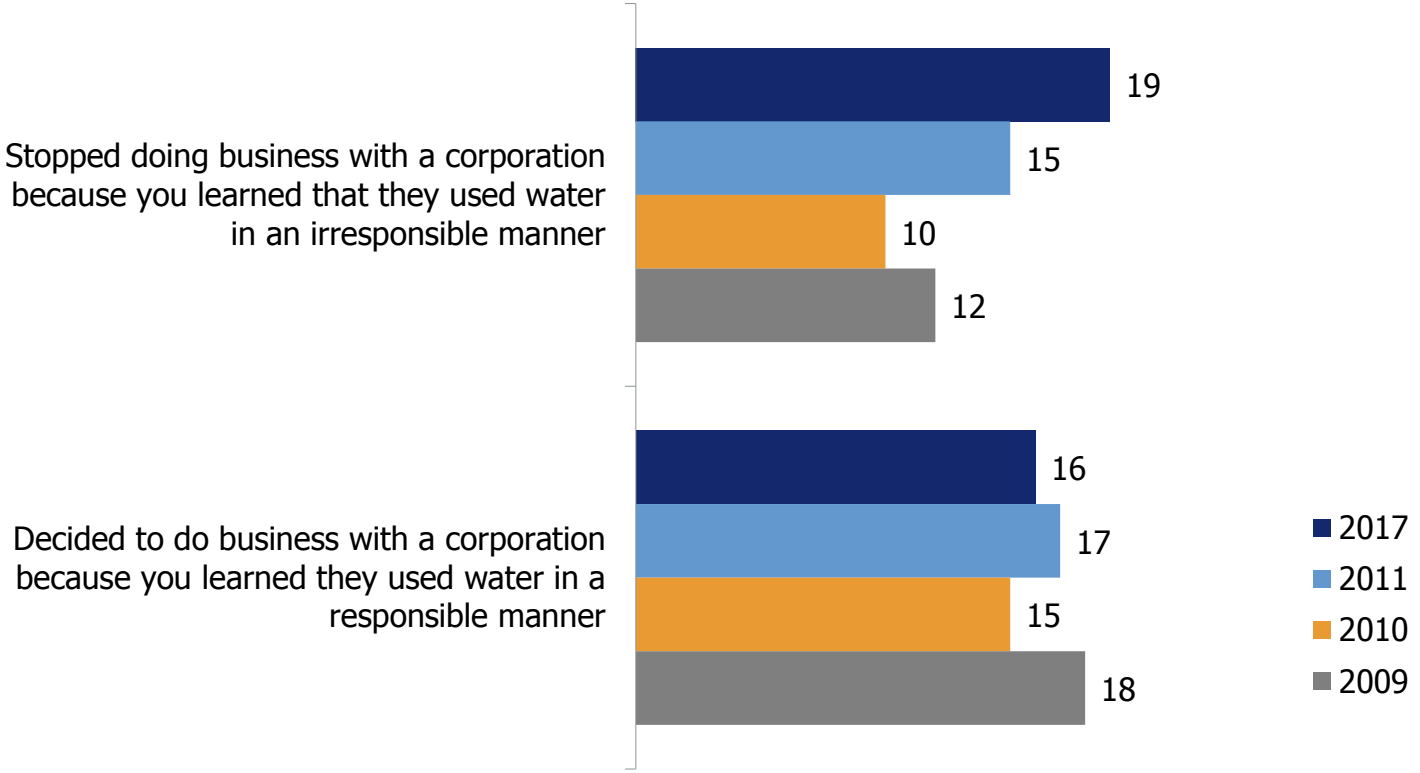
| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| Take shorter showers | 83 | 81 | 82 | 83 | 85 | 82 | 84 | 80 | 86 | 84 | 81 | 79 | 80 | 84 | 85 | 81 | 86 | 81 | 86 | 87 |
| Install low-flow toilets that use less water per flush | 66 | 68 | 67 | 69 | 64 | 73 | 64 | 68 | 68 | 69 | 61 | 69 | 57 | 70 | 73 | 68 | 67 | 67 | 69 | 67 |
| Check your toilet for leaks/ Repair or replace leaky faucets | 78 | 82 | 83 | 80 | 83 | 85 | 77 | 80 | 78 | 80 | 78 | 78 | 66 | 84 | 91 | 82 | 81 | 80 | 83 | 85 |
| Install low-flow shower heads | 66 | 63 | 66 | 67 | 72 | 70 | 65 | 63 | 72 | 63 | 67 | 69 | 50 | 70 | 79 | 69 | 67 | 67 | 70 | 68 |
| Turn-off the water while brushing your teeth | 87 | 88 | 92 | 87 | 86 | 86 | 89 | 89 | 87 | 86 | 83 | 87 | 88 | 88 | 85 | 85 | 88 | 87 | 86 | 88 |
| Purchase water-efficient appliances | 72 | 73 | 74 | 77 | 73 | 77 | 70 | 71 | 75 | 73 | 72 | 77 | 73 | 75 | 76 | 75 | 75 | 71 | 80 | 81 |
| Use concentrated household products (dishwasher soap, laundry detergent) | 87 | 88 | 91 | 85 | 86 | 91 | 87 | 86 | 87 | 83 | 87 | 91 | 80 | 88 | 90 | 85 | 88 | 85 | 87 | 92 |
| Donate to an environmental group that helps protect water | 23 | 16 | 19 | 26 | 23 | 17 | 29 | 17 | 22 | 27 | 25 | 22 | 26 | 23 | 19 | 22 | 22 | 24 | 22 | 17 |
| Avoid watering your lawn in the summer | 82 | 73 | 81 | 80 | 83 | 84 | 81 | 71 | 80 | 74 | 81 | 84 | 80 | 82 | 79 | 78 | 82 | 78 | 82 | 88 |
| Use rain barrels to collect water for use in your garden/lawn | 37 | 47 | 52 | 38 | 37 | 38 | 34 | 43 | 50 | 34 | 33 | 36 | 37 | 41 | 40 | 38 | 41 | 35 | 42 | 54 |
| Avoid unnecessary water use (e.g., watering driveways, sidewalks, etc.). | 88 | 85 | 89 | 84 | 90 | 92 | 87 | 85 | 87 | 81 | 88 | 90 | 85 | 89 | 87 | 86 | 89 | 85 | 88 | 94 |
| Shower with my partner/friend | 24 | 33 | 32 | 26 | 31 | 28 | 24 | 30 | 39 | 24 | 31 | 37 | 39 | 29 | 18 | 30 | 27 | 26 | 34 | 29 |

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

Q. What do you do to help conserve fresh water, and how often, if at all?

# Around two in ten Canadians have either stopped doing or decided to do business with a corporation because of their responsible or irresponsible use of water

## Actions Taken by Consumers on Irresponsible and Responsible Water Use, "Yes," 2009 –2017




Those aged 18-34 years are more likely to say they would stop doing (26%) or do business (24%) with a corporation based on their responsible or irresponsible use of water.

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

Q. Have you ever done either of the following?

# Actions Taken by Consumers on Irresponsible and Responsible Water Use, Demographics, 2017

| | REGION | | | | | | CITY | | | | | | AGE | | | GENDER | | COMMUNITY SIZE | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | British Columbia | Alberta | Prairies | Ontario | Quebec | Atlantic | Vancouver | Calgary | Winnipeg | Toronto | Montreal | Halifax | 18-34 years | 35-55 years | >55 years | Male | Female | Urban (>100,000) | Mid-size towns/cities | Rural (<1,000) |
| **Stopped doing business with a corporation because you learned that they used water in an irresponsible manner** | | | | | | | | | | | | | | | | | | | | |
| Yes | 24 | 12 | 14 | 21 | 20 | 14 | 26 | 13 | 18 | 21 | 22 | 16 | 26 | 19 | 14 | 21 | 17 | 19 | 20 | 16 |
| No | 75 | 85 | 84 | 79 | 79 | 85 | 73 | 85 | 81 | 79 | 77 | 83 | 74 | 80 | 85 | 78 | 82 | 80 | 79 | 83 |
| **Decided to do business with a corporation because you learned they used water in a responsible manner** | | | | | | | | | | | | | | | | | | | | |
| Yes | 18 | 15 | 9 | 17 | 16 | 12 | 22 | 17 | 12 | 19 | 17 | 14 | 24 | 15 | 10 | 18 | 14 | 16 | 16 | 12 |
| No | 80 | 83 | 89 | 82 | 83 | 86 | 77 | 82 | 87 | 80 | 83 | 85 | 75 | 83 | 89 | 82 | 84 | 82 | 83 | 85 |

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

Q. Have you ever done either of the following?

# Methodology

- A sample of 2,017 Canadian adults from GMI's consumer panel participated in an online survey between **January 4th – 25th , 2017**.
- Weighting was employed to balance demographics to ensure that the sample's composition reflects the adult population according to Canadian census data, and to provide results intended to approximate the sample universe. Results were weighted by gender, age, region, and community size. The sample includes a minimum of **200** respondents in each of Calgary, Montreal, Vancouver, and Winnipeg, and a minimum of **300** in Toronto. **119** interviews were completed in Halifax.
- Respondents for this survey were selected from among those who have volunteered to participate in GMI's online surveys and polls. The data have been weighted to reflect the demographic composition of the Canadian population. Because the sample is based on those who initially self-selected for participation rather than a probability sample, sampling error cannot be calculated. All sample surveys and polls may be subject to multiple sources of error, including, but not limited to, sampling error, coverage error, and measurement error. The margin of error for a strict probability sample for a sample of this size (***n*=2,017**) would be plus or minus **2.2 percent 19 times out of 20.**

**Note to readers**

- All figures in the charts and tables in this report are expressed in percentages, unless otherwise indicated. Total percentages may not add to 100 because of rounding.
- "DK/NA" means that the respondent did not know the answer or that no answer was provided (Don't know / No answer).
- Question wording is provided at the bottom of each page.
- Where data are available, we provide tracking information from previous years using trend charts and tables. Differences of +/- 5 percentage points between years are considered to be significant differences.

*For more information, contact:*

**Eric Whan,** Director, Sustainability

tel:416.969.3087

Eric.Whan@GlobeScan.com

**Gayle Chong,** Senior Project Manager

tel: 647.831.6616

Gayle.Chong@GlobeScan.com

**Vanesa Berenstein,** Senior Project Manager

Vanesa.Berenstein@GlobeScan.com

www.GlobeScan.com



**Project: 2933, GlobeScan®**

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