



UN Water for Life Unilever/RBC Survey 2008





Methodology

- Fielded online from January 25 to January 30 via the Ipsos I-Say Panel
- Total sample of 2309 Canadians; Aggregate data NOT yet weighted according to Census Data. Regional samples of:
 - British Columbia n = 318
 - Alberta n = 221
 - Saskatchewan and Manitoba n = 258
 - Ontario n = 739
 - Quebec n = 532
 - Atlantic Canada n = 241
- Total Margin of error of +/- 2.0%



Executive Summary

- Canadians are concerned about the supply of fresh water in this country. But it appears that the concern has not reached a critical point.
- Most people believe that climate change is going to affect adversely the long-term supply of fresh water; however, relatively few have personally witnessed these effects.
- Demographically, the differences between men and women are significant. Also, there are marked differences between respondents in Quebec and the rest of Canada.
- For the most part, Canadians are doing the things which they believe to be important in conserving water. But while individually they believe they are doing alright, collectively they feel like they could be doing quite a bit more than they are.



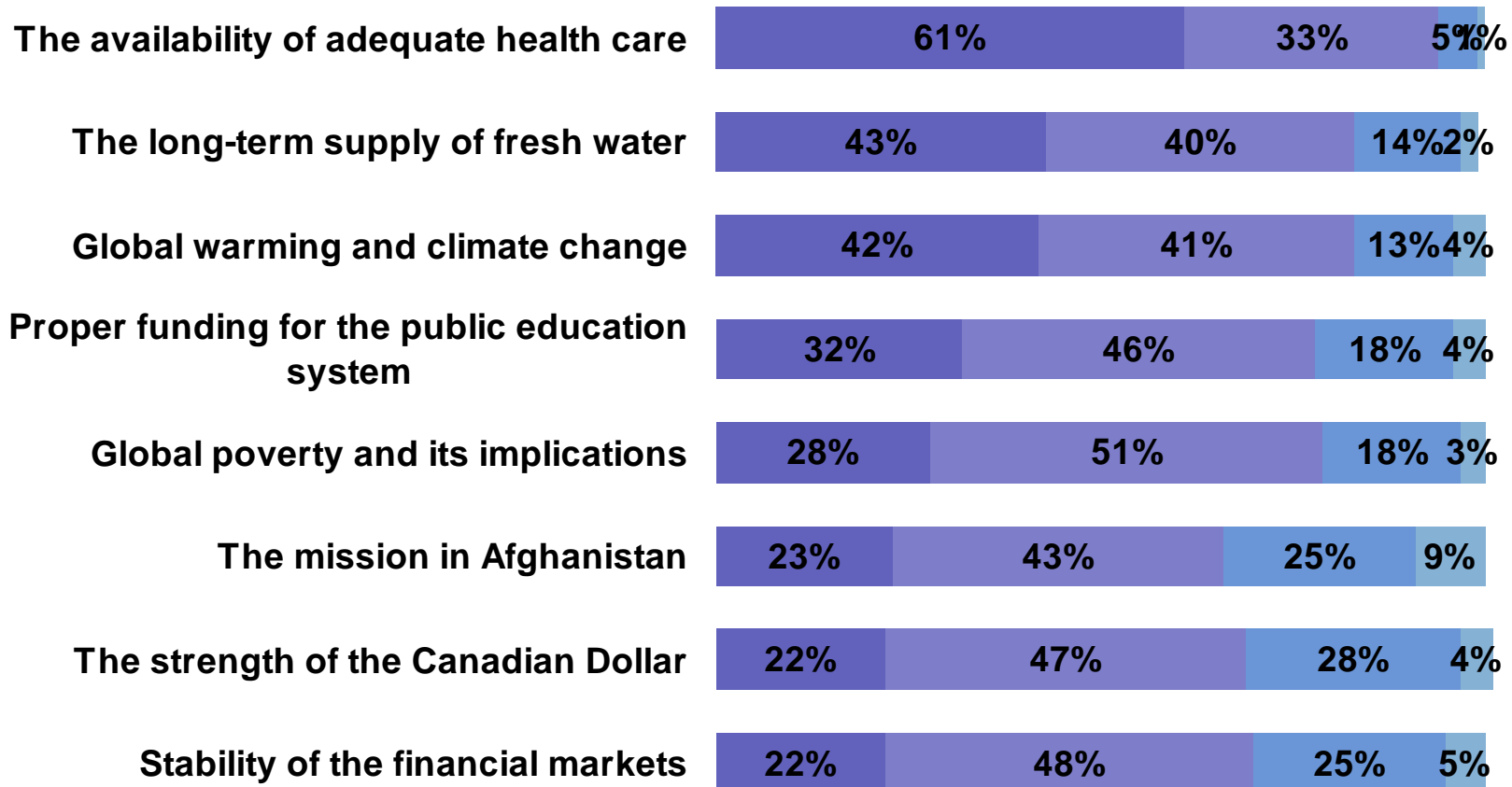
Executive Summary

- Canadians are open to the idea of taking a loan to finance environmentally-friendly home renovations; however, only one in ten are very likely to do so. However, a majority say that they would be willing to include water conservation measures in their renovation plans.
- Most Canadians say that they would be willing to spend a little more than they are now spending on environmentally-friendly products.
- Canadians are mixed in their opinions of business' responsibility to protect Canada's water. While they are quick to boycott products which misuse or pollute water, they don't appear to be holding companies overly responsible for helping to manage Canada's supply of water. Perhaps this is a result of most believing that water is not a commodity, and thus it is best to keep corporations out of it.
- More Canadians believe that there is a water quality problem than a water supply problem.



Concern surrounding the long-term supply of fresh water is second only to the availability of adequate health care.

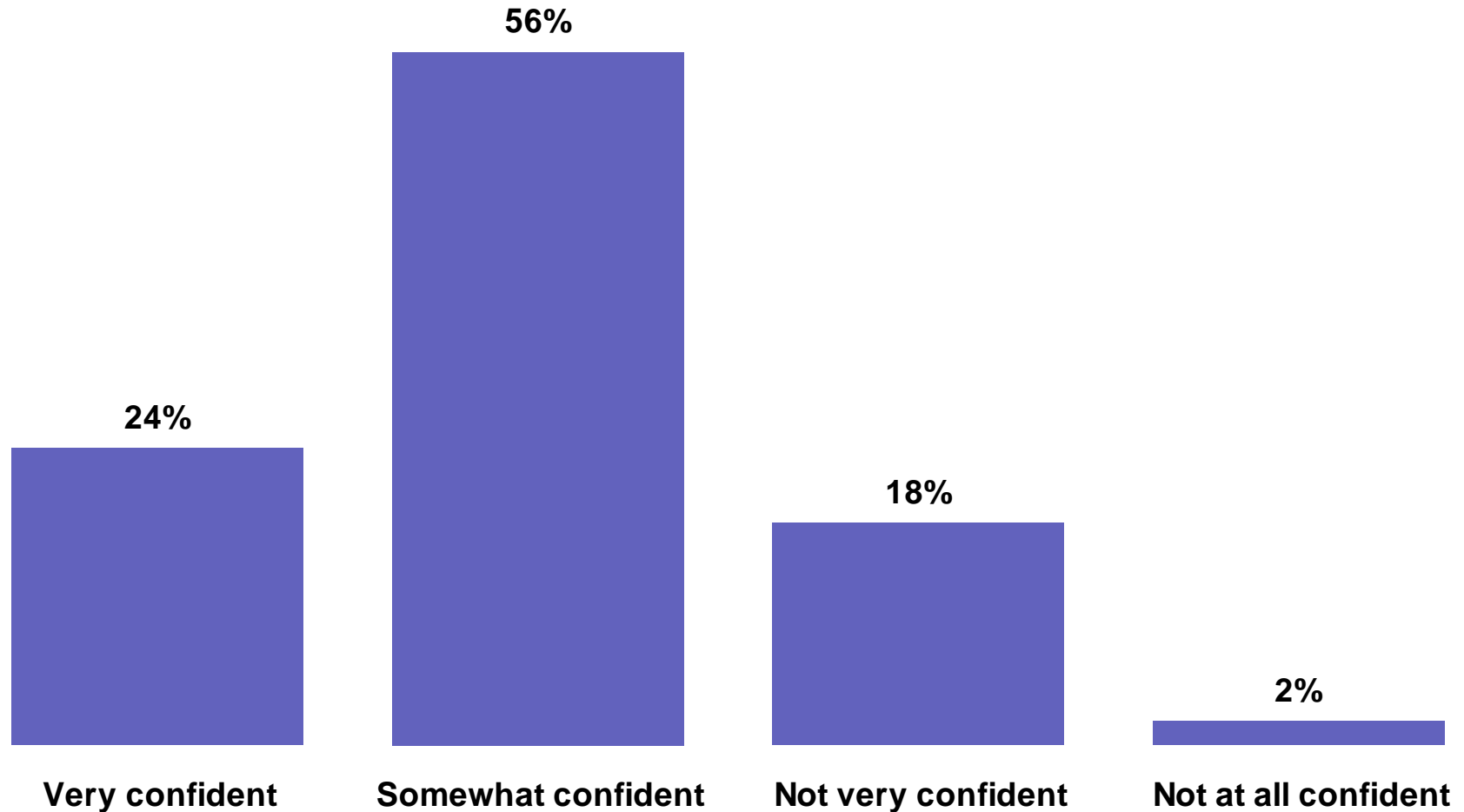
■ Very concerned ■ Somewhat concerned ■ Not very concerned ■ Not at all concerned



Q1. Here is a list of issues that you might be concerned about. For each, please tell me the degree to which you are or are not concerned. Base: All respondents N=2309



There exists a tentative confidence in the long-term supply of Canada's fresh water.



Q2. Now, thinking about Canada's supply of water, how confident are you that Canada in general has enough freshwater to meet our long-term needs? Base: All respondents N=2309



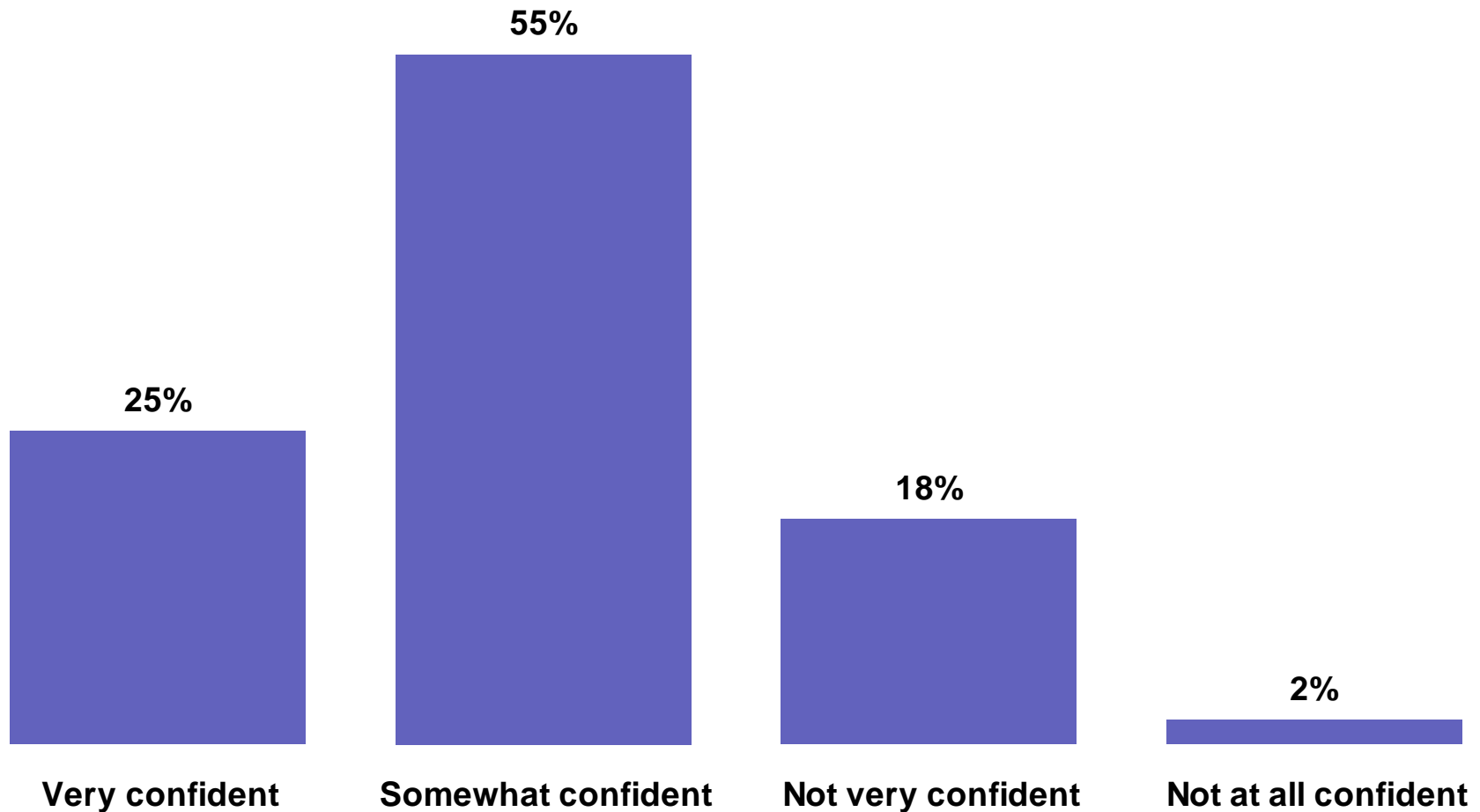
Men are more confident in the long-term supply of fresh water than women are. Quebecers are considerably less confident than the rest of Canada.

- Men (86%) are more likely than women (75%) to be 'confident' that Canada in general has enough fresh water to meet our long-term needs.
- Older Canadians (84%) are more likely than middle-aged (79%) or younger Canadians (77%) to be confident that Canada has enough fresh water to meet our long-term needs.
- Residents of Saskatchewan and Manitoba (88%) are well above the national average (80%); residents of Quebec are well below (67%) the average.
- As one's income rises, the higher the propensity to be confident.

	% Confident
18-34	77%
35-54	79%
55+	84%
Men	86%
Women	75%
BC	86%
Alberta	84%
Sask./Man.	88%
Ontario	83%
Quebec	67%
Atlantic	82%



Most Canadians are confident in the safety and quality of Canada's water supply...but that confidence, again, appears to be tentative.





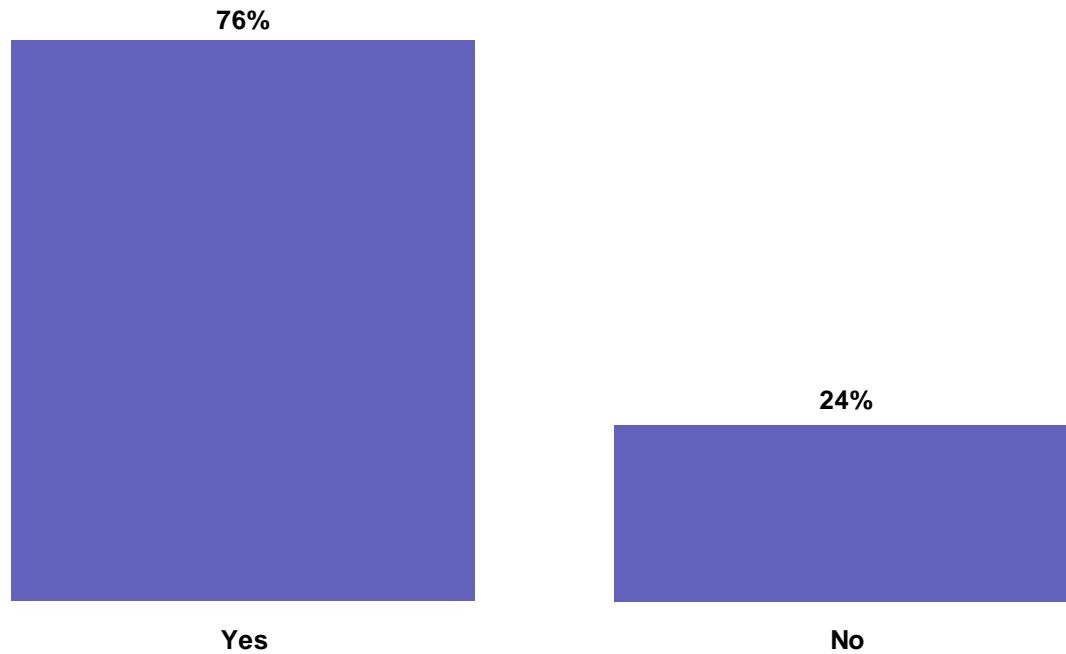
The trend that men are more confident than women continues; Quebec's relative lack of confidence is also consistent.

- Men (85%) are more likely than women (77%) to be 'confident' in the safety and quality of Canada's fresh water supply.
- Older Canadians (84%) are more likely than middle-aged (79%) or younger Canadians (81%) to be 'confident' in the safety and quality of Canada's fresh water supply.
- Residents of Saskatchewan and Manitoba (90%) are well above the national average (81%); residents of Quebec are well below (67%) the average.
- As one's income rises, the higher the propensity to be confident.

	% Confident
18-34	81%
35-54	79%
55+	84%
Men	85%
Women	77%
BC	86%
Alberta	88%
Sask./Man.	90%
Ontario	82%
Quebec	67%
Atlantic	81%



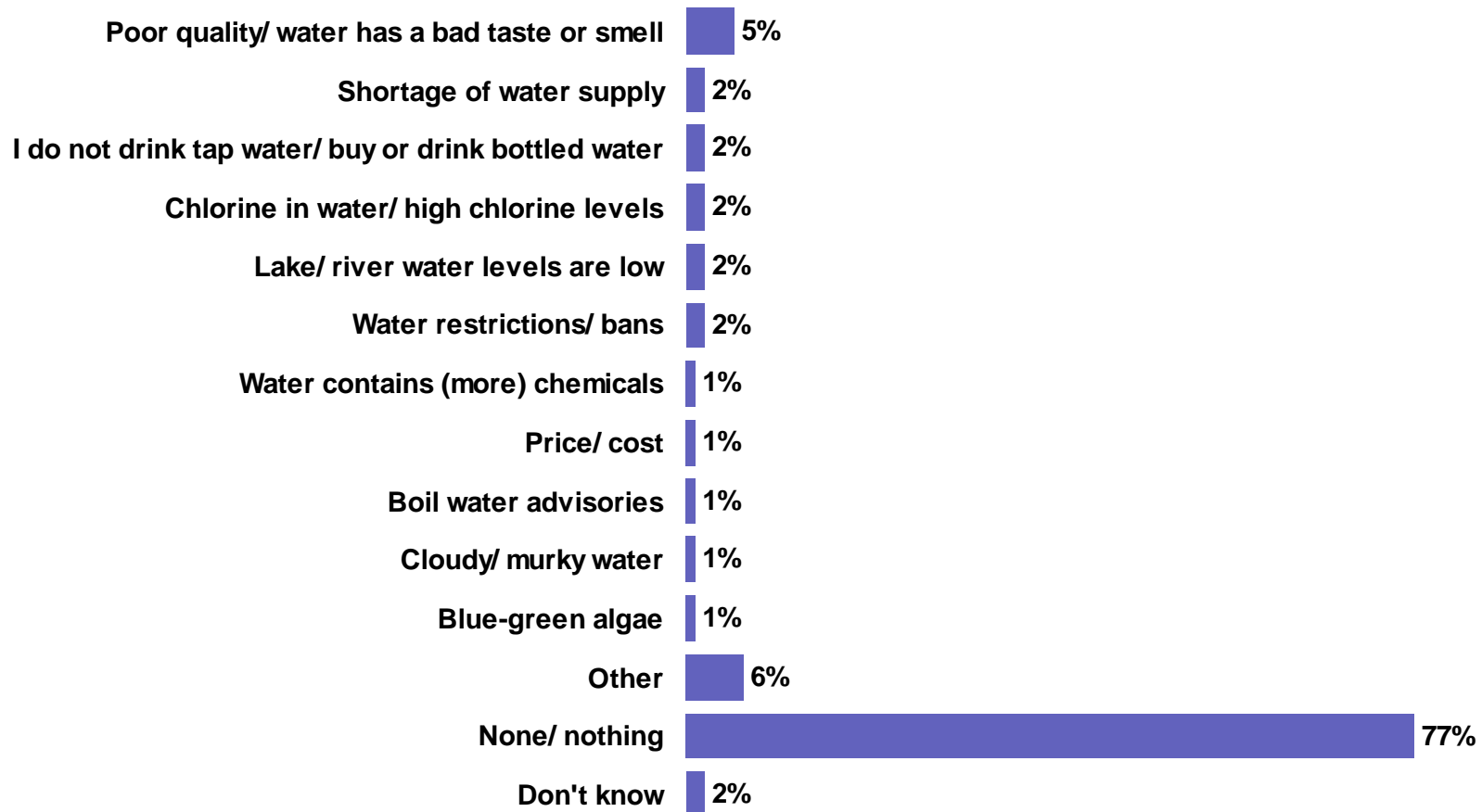
Most believe that climate change will impact Canada's supply of fresh water.



	% yes
18-34	80%
35-54	75%
55+	73%
Men	67%
Women	83%
BC	73%
Alberta	74%
Sask./Man.	68%
Ontario	76%
Quebec	80%
Atlantic	80%

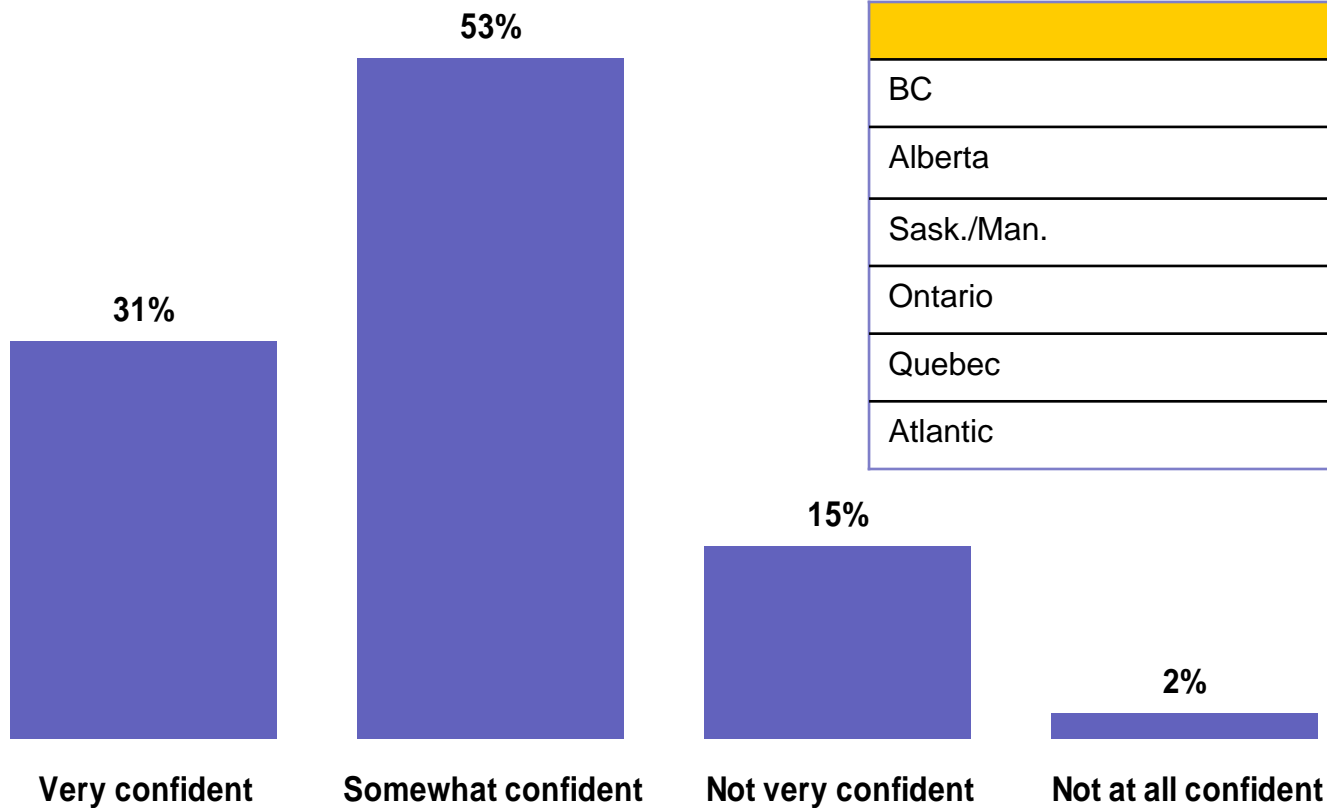


But most have not witnessed any adverse changes to their water supply.





Albertans and Quebecers are the least likely to be confident about the long-term supply of fresh water in their region.

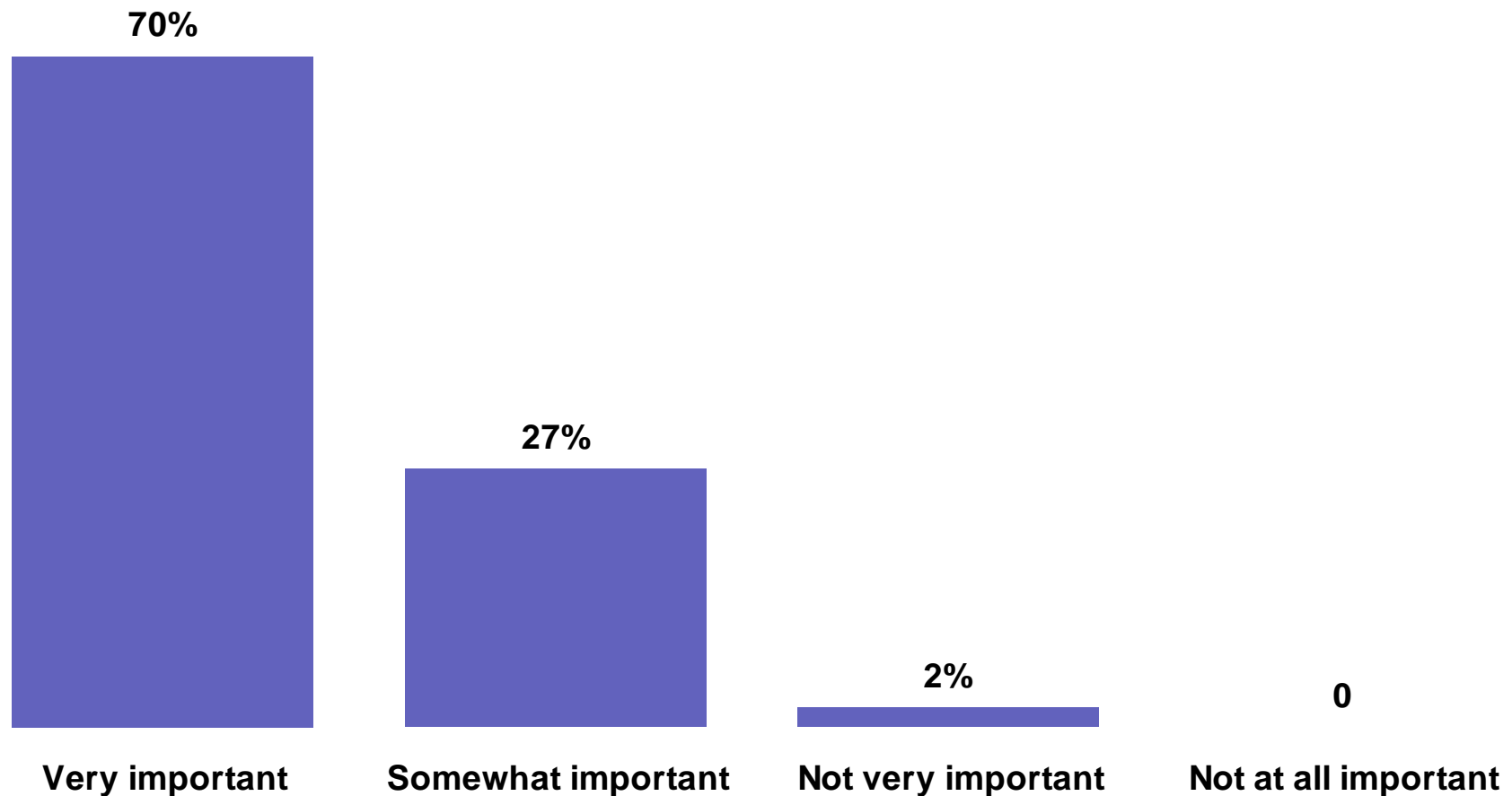


	% Confident
BC	90%
Alberta	78%
Sask./Man.	90%
Ontario	85%
Quebec	74%
Atlantic	89%

Q6. And focusing specifically on your region of Canada, how confident are you that it has enough freshwater to meet your region's long-term needs? Base: All respondents N=2309

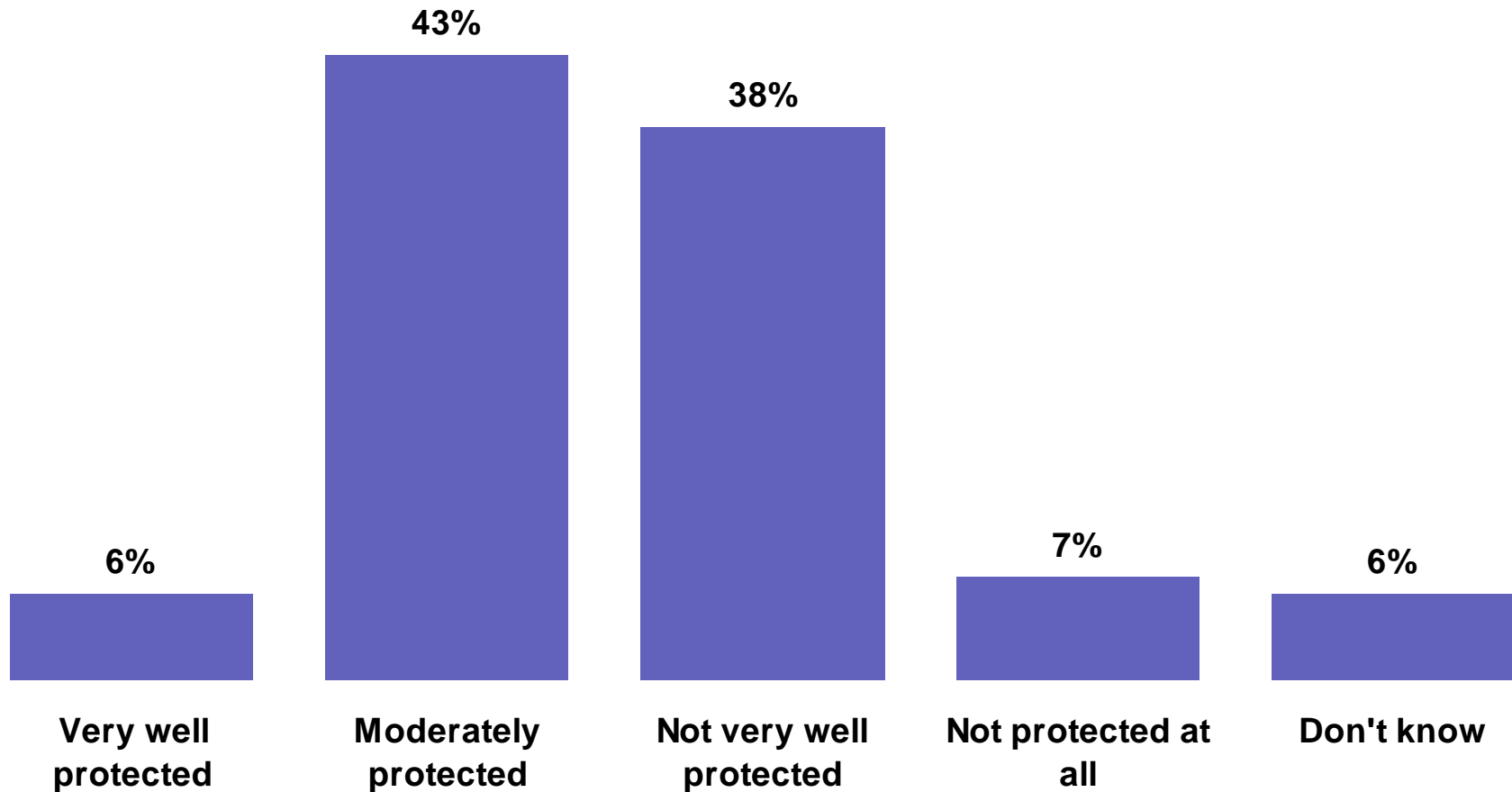


Almost all agree that an abundant supply of fresh water is important to Canada's national economy.





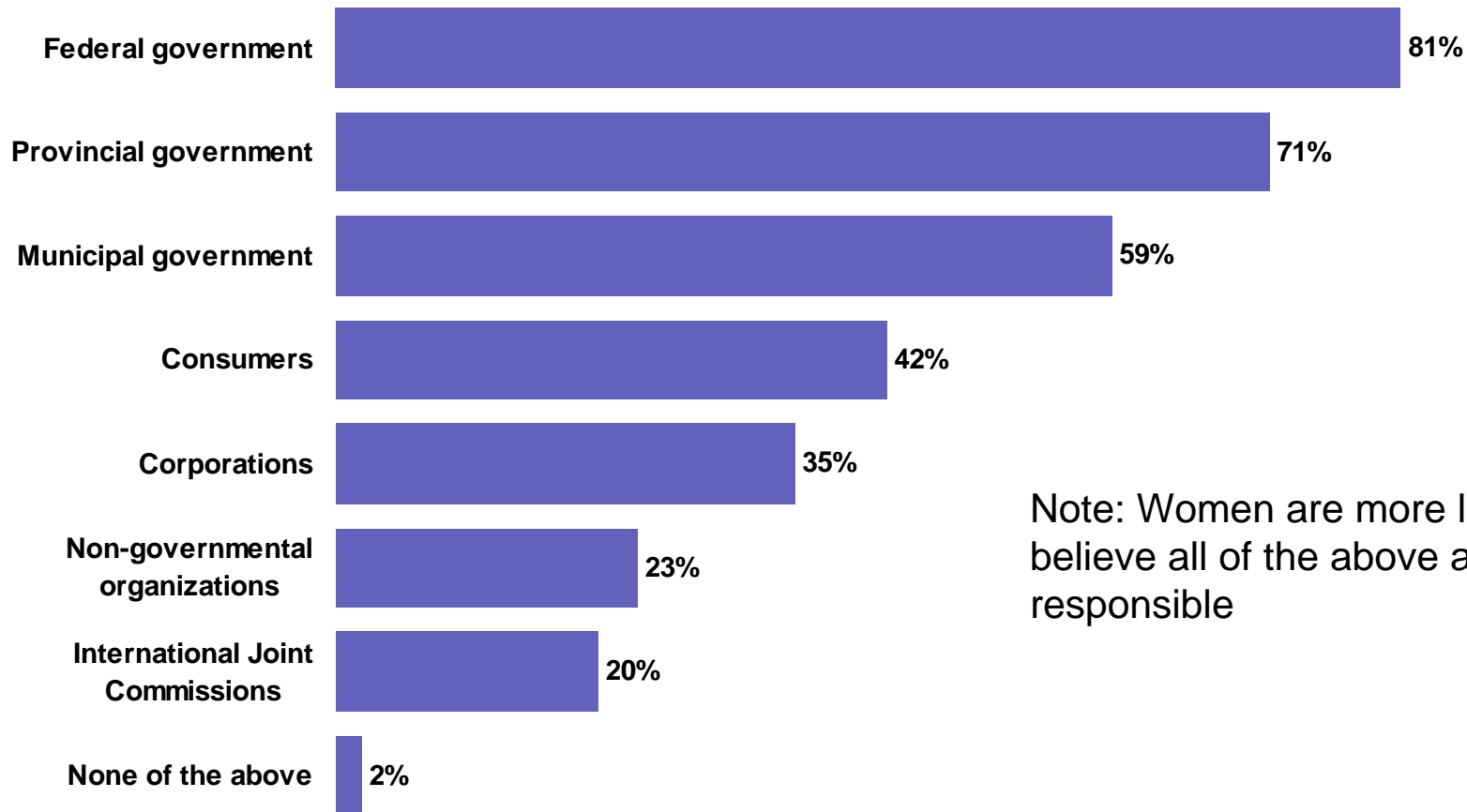
Canadians are split on whether fresh water is at least moderately protected by various laws and regulations.



Q8. And based on what you have seen, read or heard, how well do you think Canada's freshwater resources are protected by laws and regulations?
Base: All respondents N=2309



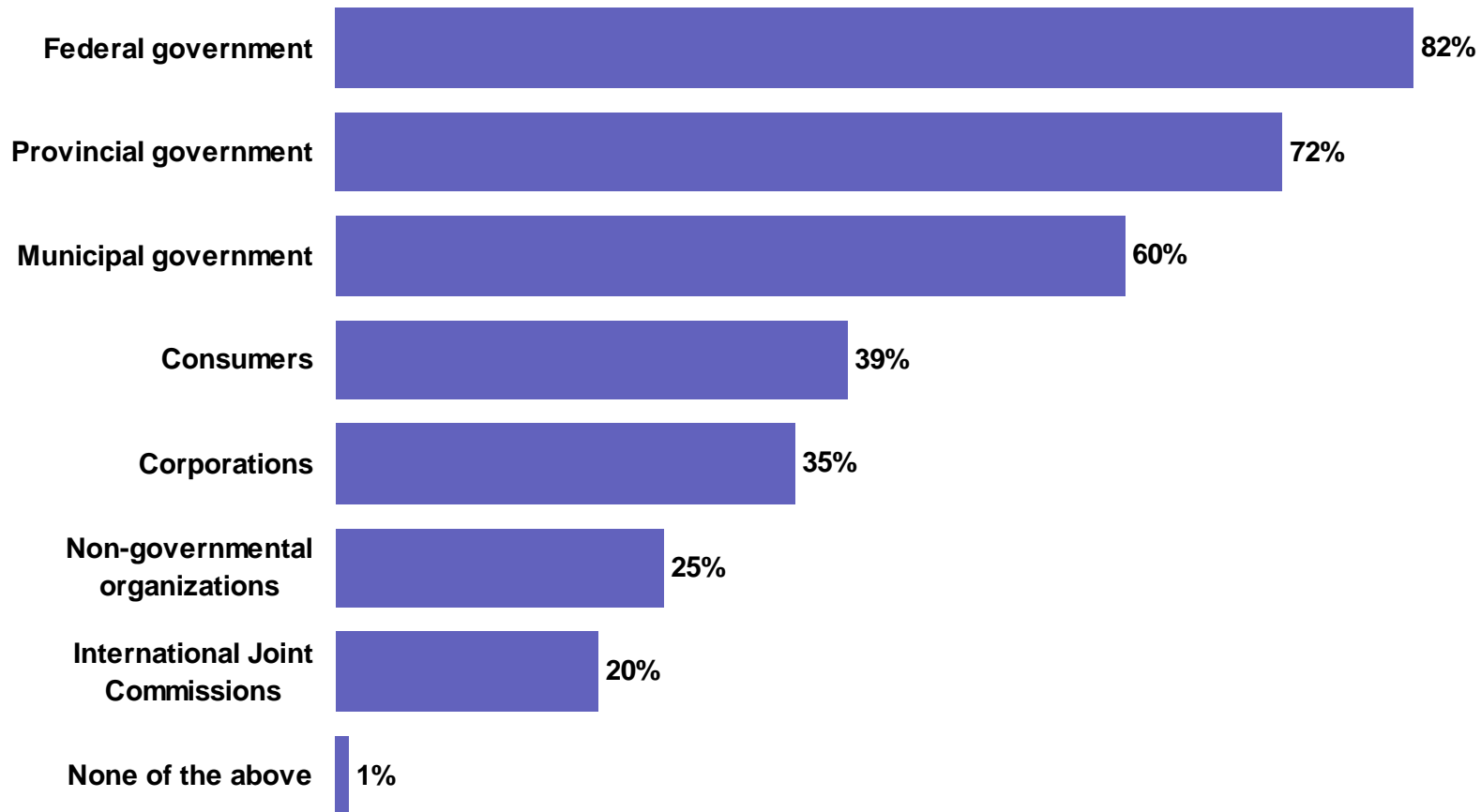
Most believe that the government is responsible for the management of clean, fresh water in Canada...not corporations



Note: Women are more likely to believe all of the above are responsible

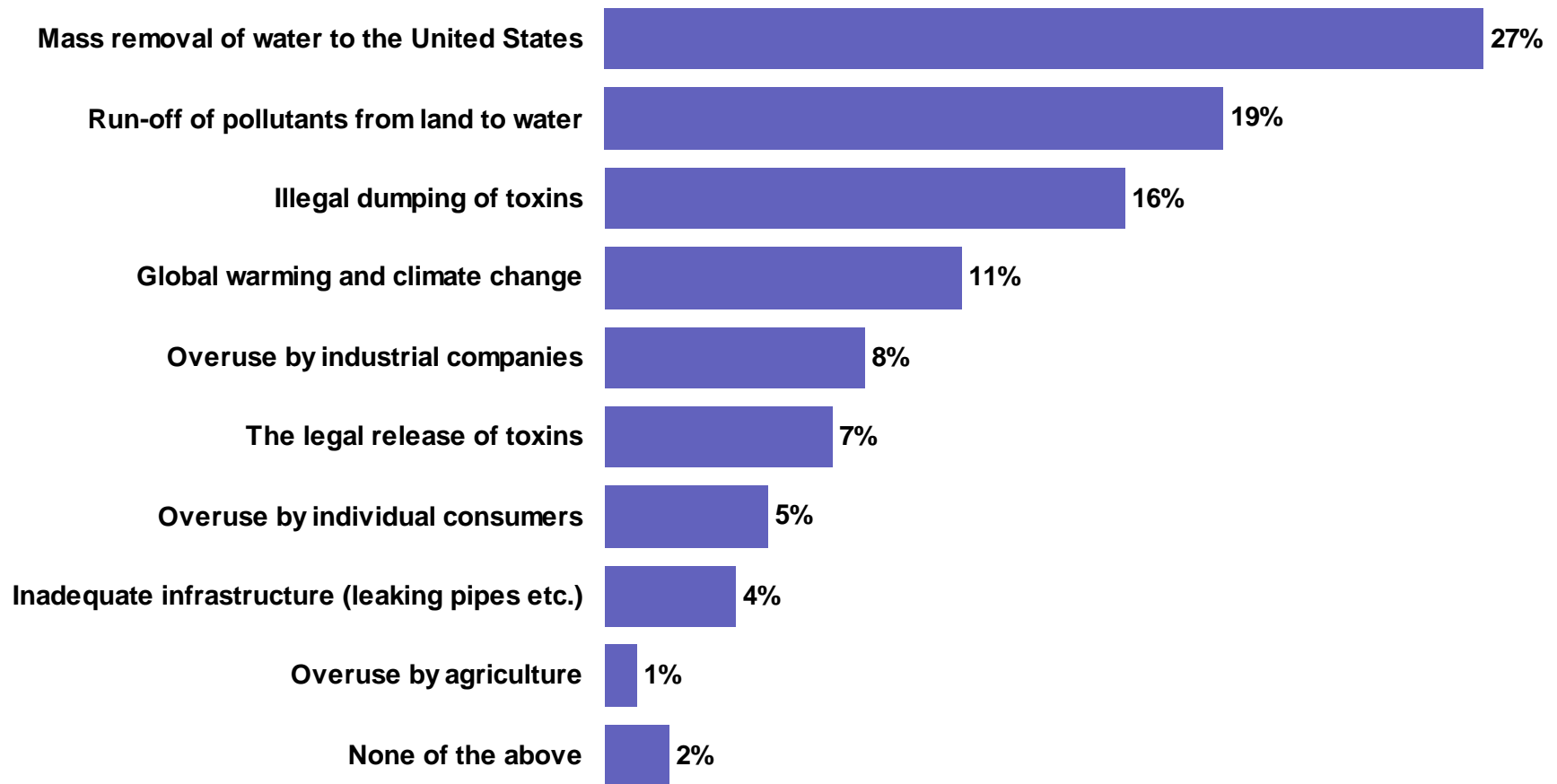


It appears that the bodies Canadians believe should be responsible for the management of water is also who they believe is responsible.





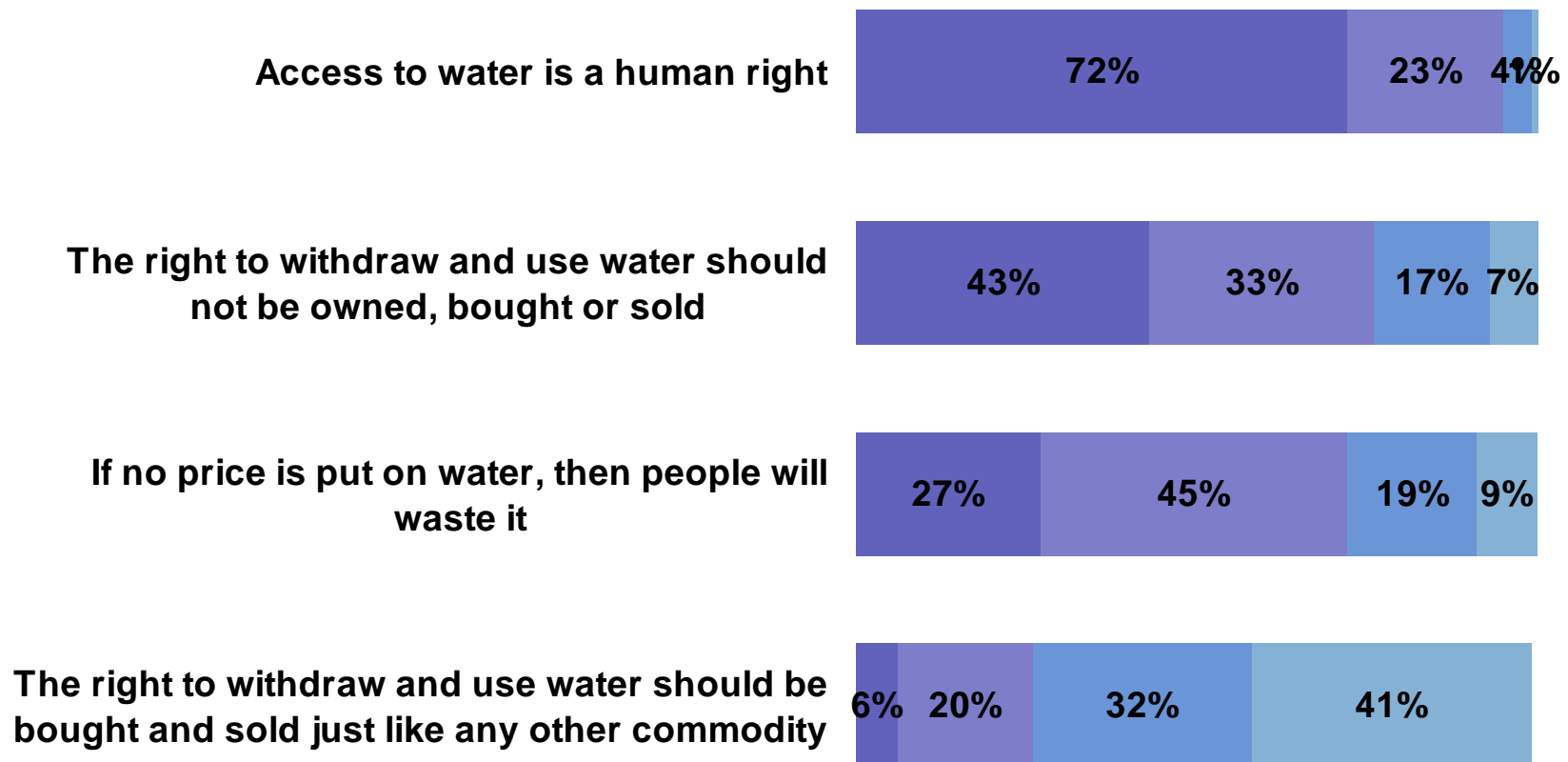
Various threats to Canada's fresh water supply include...





Virtually all believe that access to water is a human right, and that it should not be bought and sold like any other commodity.

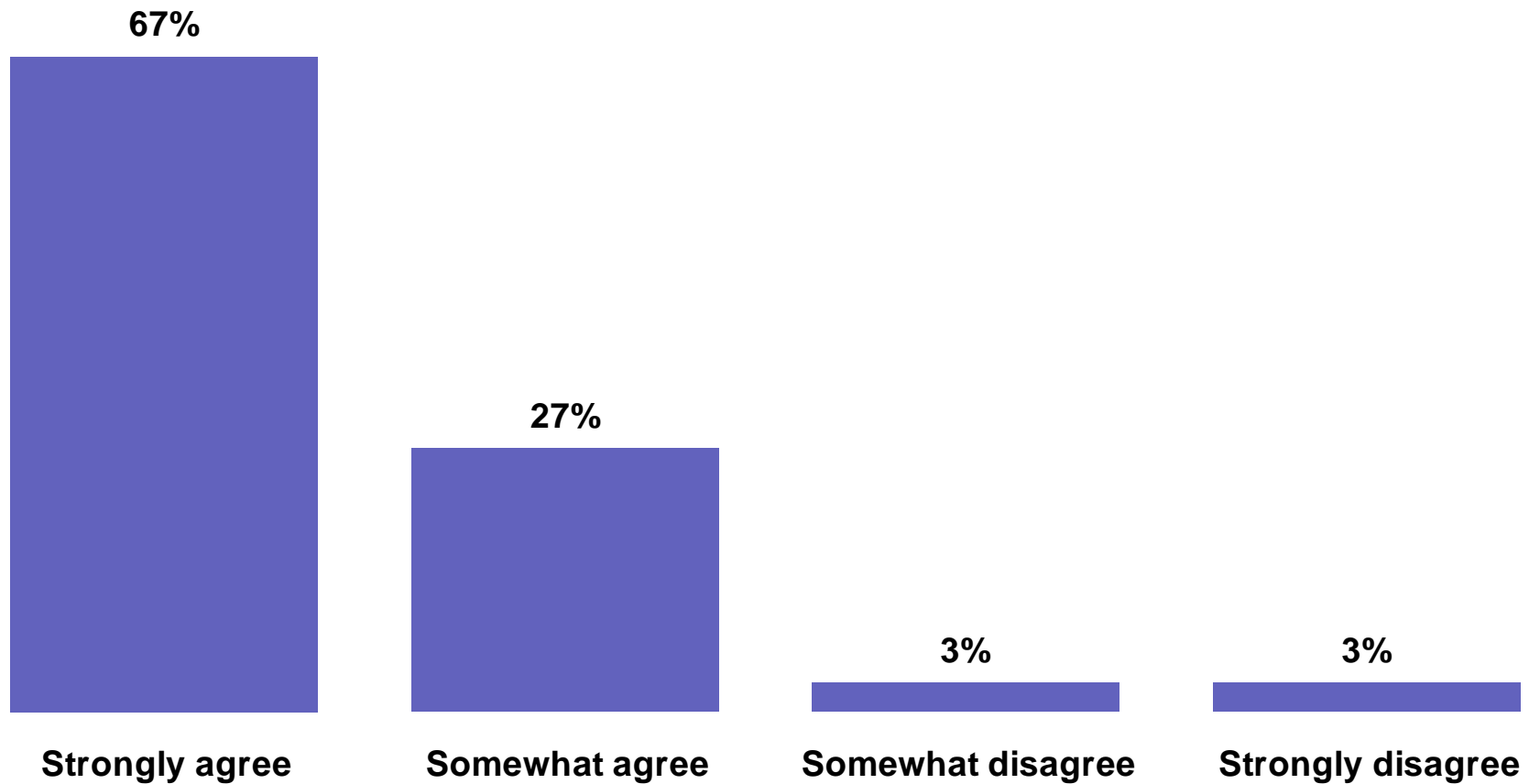
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



Q12. Some people say that freshwater should be treated like any other commodity and that the right to use it can be bought and sold just like wheat or sugar. Other people say that the rights to freshwater should not be owned, bought or sold by any person or corporation. For each statement below, please tell me the degree to which you agree or disagree: Base: All respondents N=2309

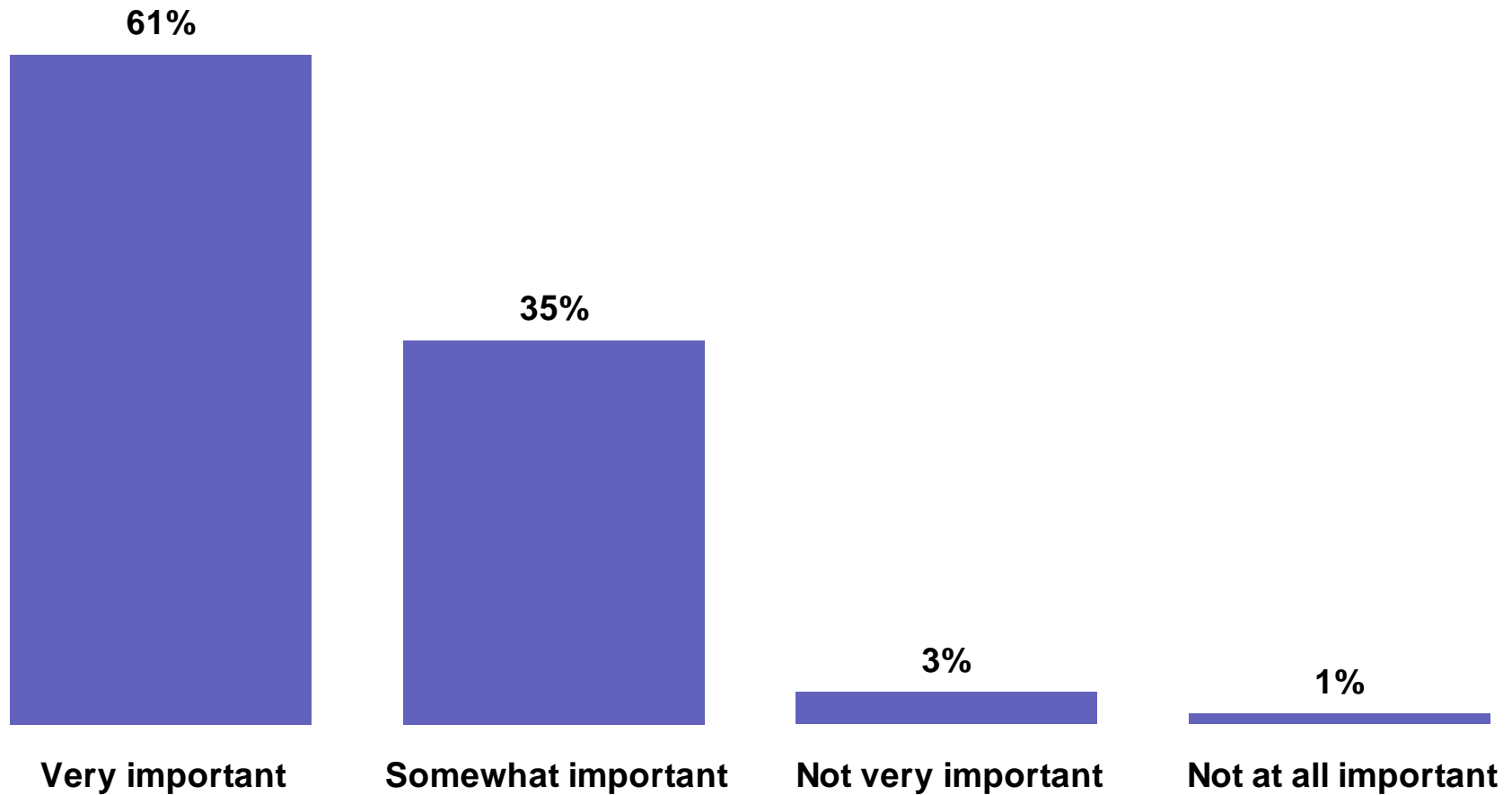


Two thirds strongly agree that companies should play an active role in protecting Canada's fresh water.





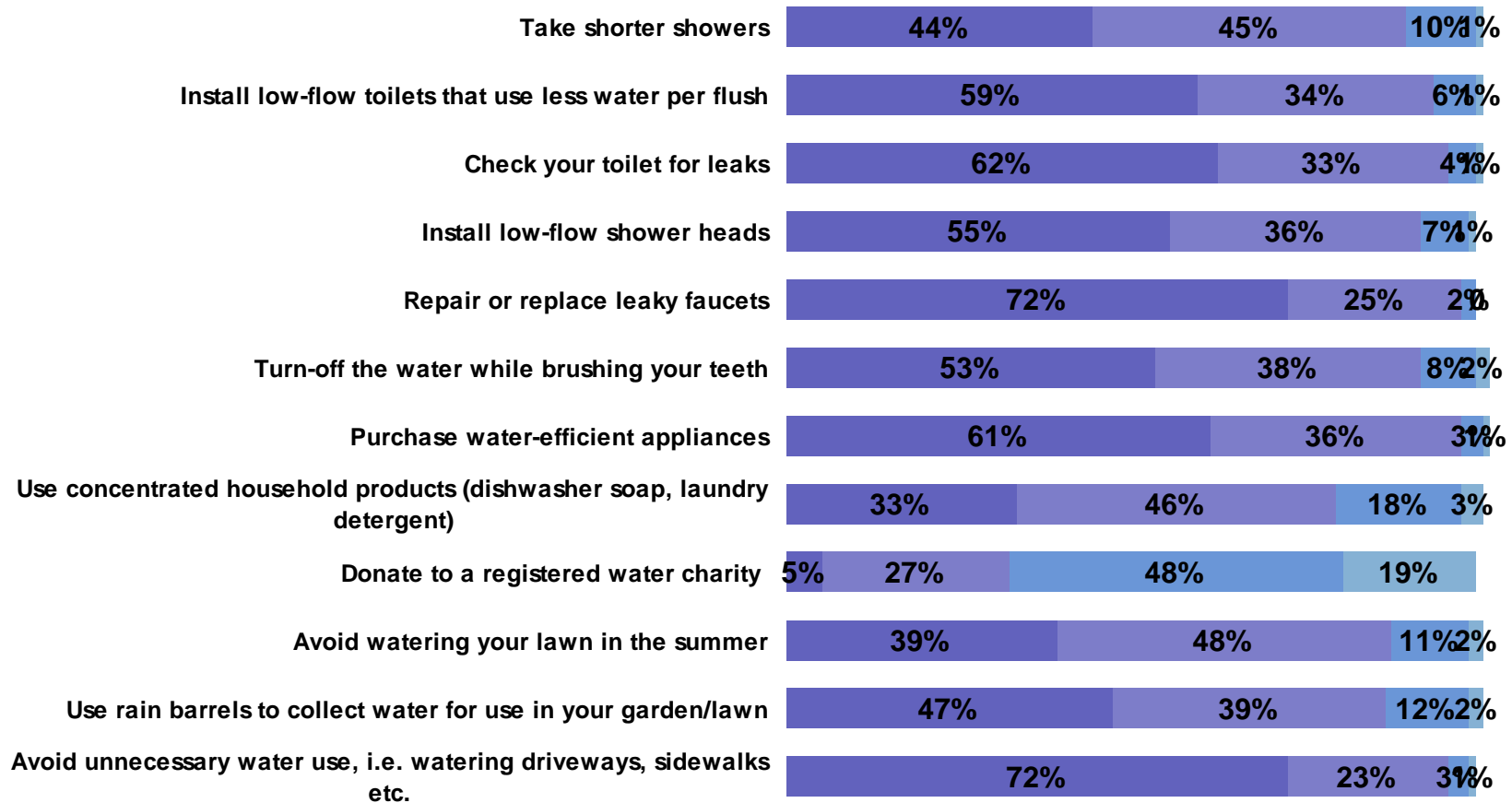
Six in ten believe it is very important to them to conserve fresh water on an ongoing basis.





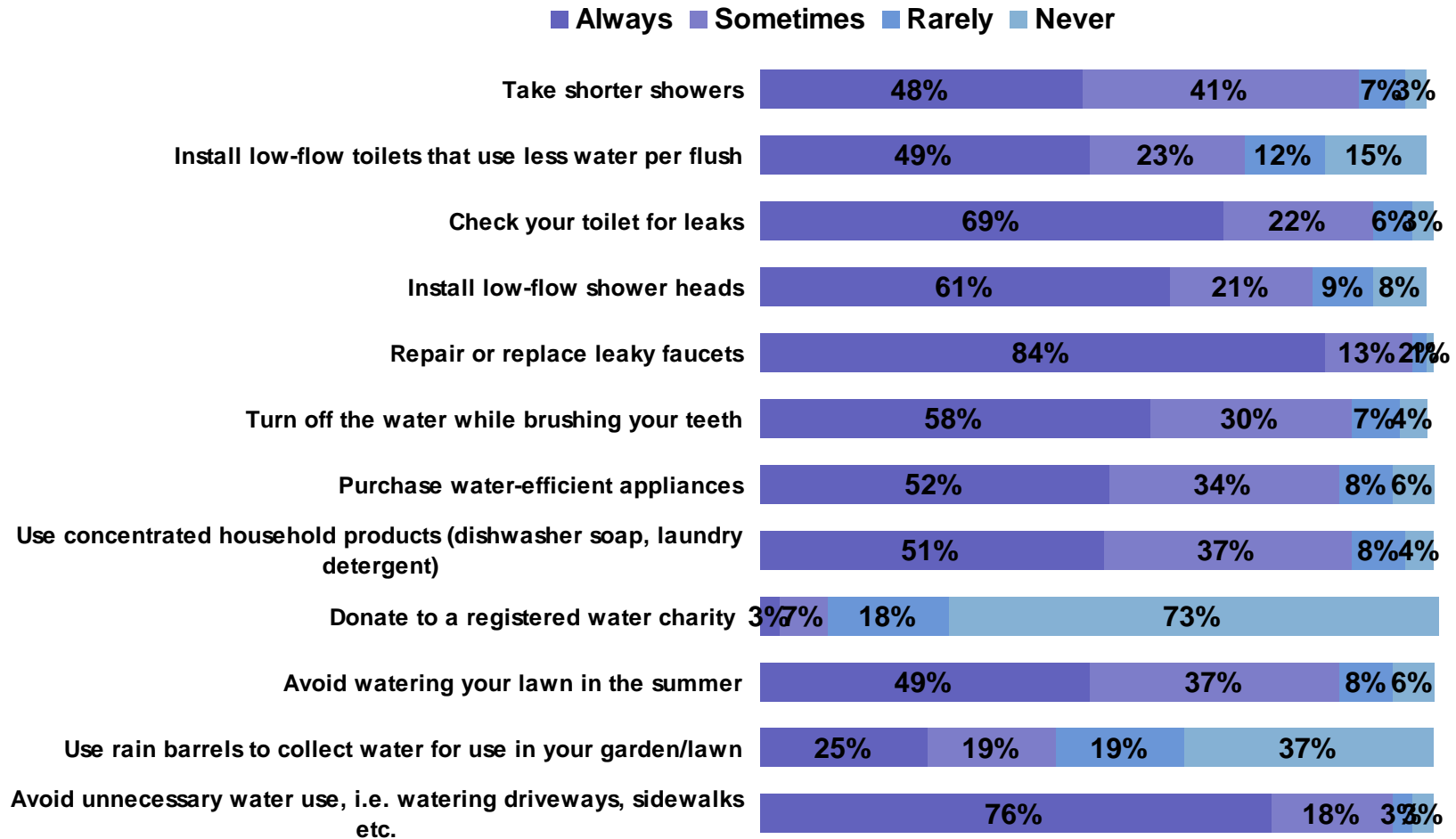
Replacing leaky faucets tops the list of what Canadians believe is most important in conserving fresh water.

■ Very important
 ■ Somewhat important
 ■ Not very important
 ■ Not at all important





It is also the most frequently-cited example of what Canadians are doing to conserve fresh water.



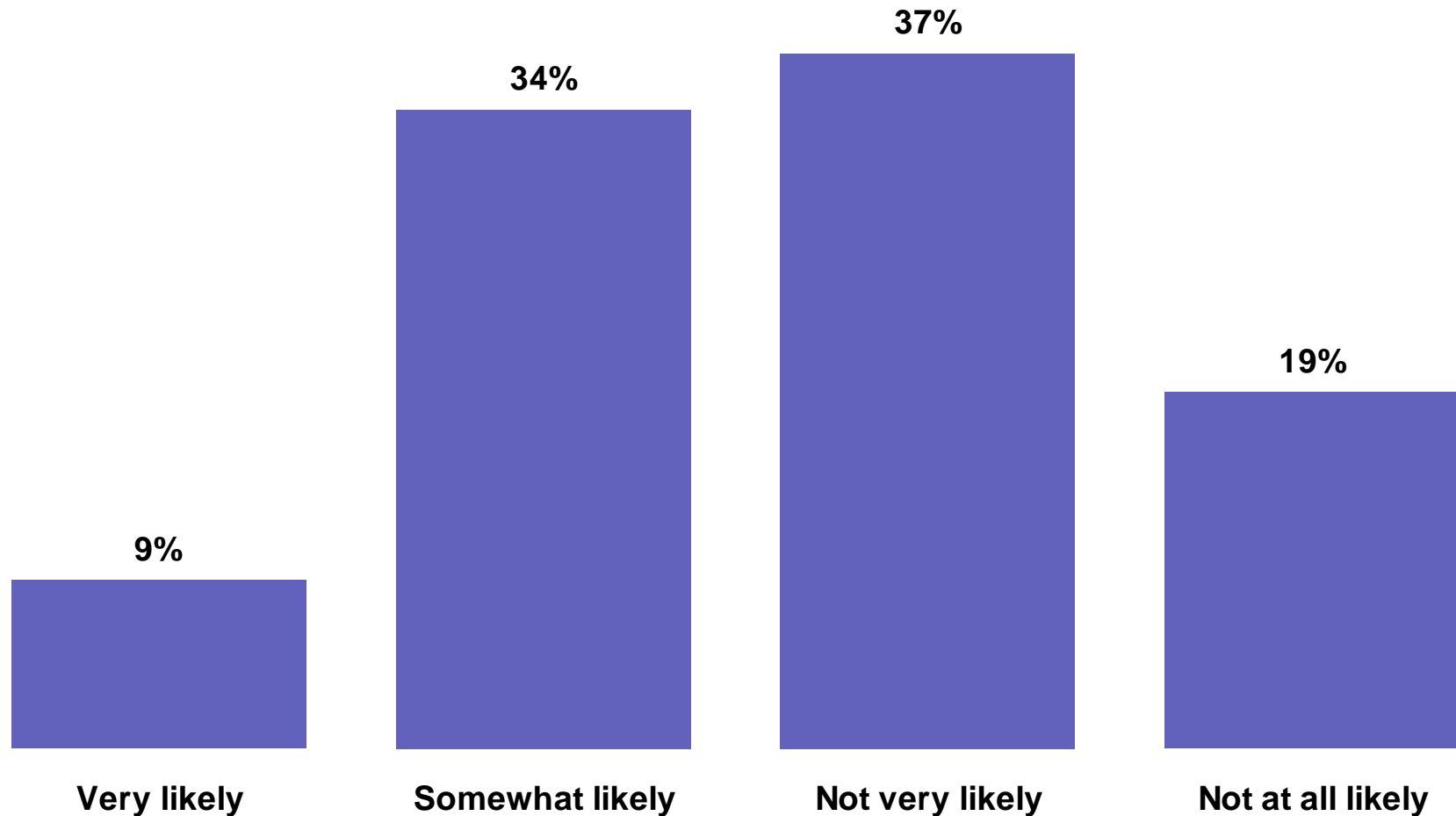


The largest discrepancies between what Canadians believe is important to do and what they are doing are: using rain barrels (42 point gap), installing low-flow toilets (21 point gap) and donating to registered water charities (22 point gap).

What Canadians Think is Important	Statement	What Canadians Are Doing
89%	Take Shorter Showers	89%
93%	Low-Flow toilets	72%
95%	Check Toilets for Leaks	91%
92%	Low-Flow Shower Heads	83%
97%	Repair Leaky Faucets	96%
90%	Turn off Water When Brushing Teeth	88%
97%	Purchase Water-Efficient Appliances	86%
79%	Use Concentrated Household Products	88%
33%	Donate to Registered Water Charity	9%
87%	Avoid Watering Lawn	86%
86%	Use Rain Barrels	44%
96%	Avoid Unnecessary Water Use	94%



Nearly one half of Canadians say that they would be at least somewhat likely to take a loan in order to finance an environmentally-friendly home renovation.



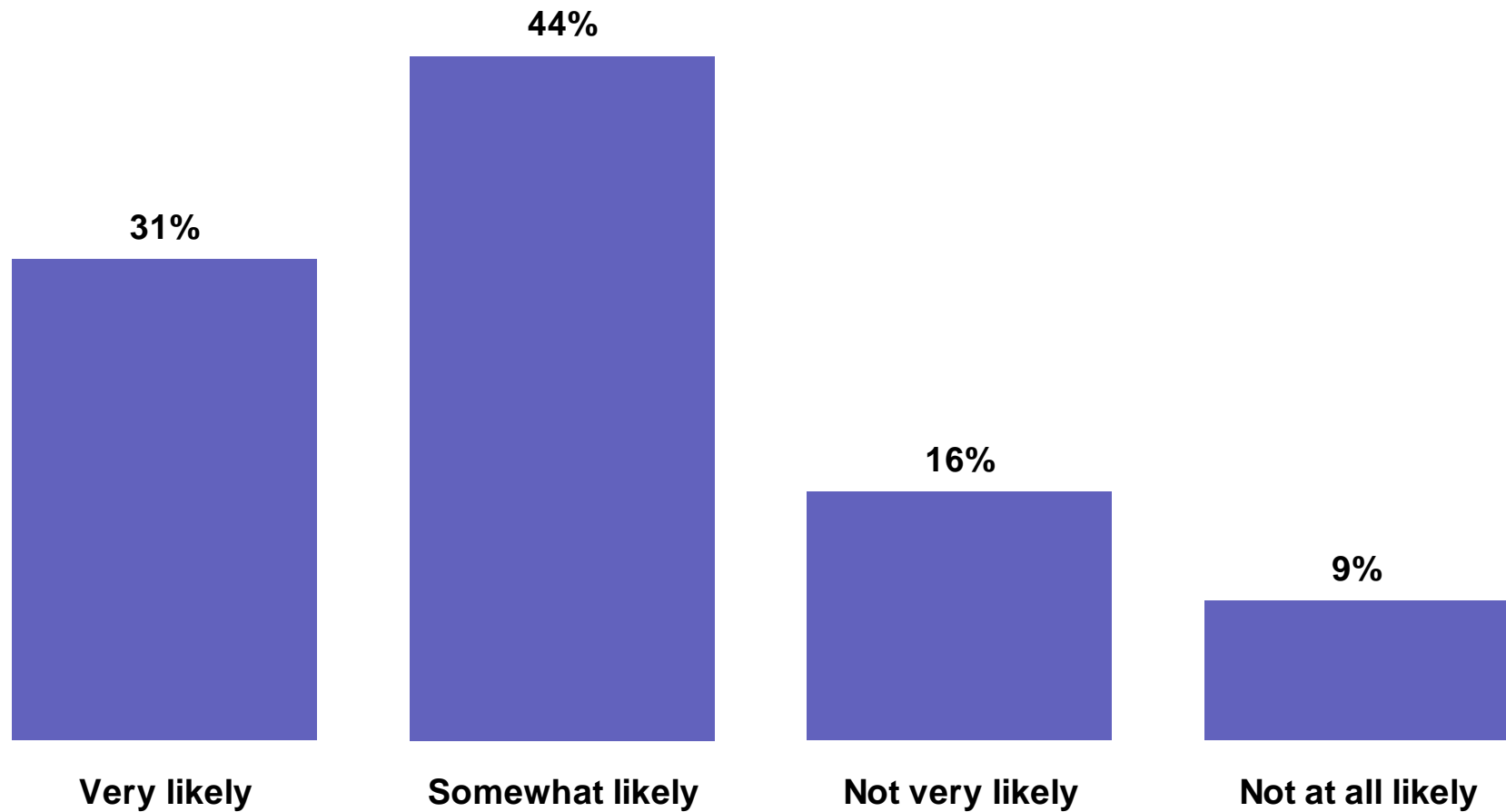


Residents of Saskatchewan and Manitoba are most likely to take a loan to finance environmentally-friendly home renovations.

	% likely (top2box)
18-34	44%
35-54	46%
55+	36%
Men	42%
Women	44%
BC	43%
Alberta	48%
Sask./Man.	54%
Ontario	42%
Quebec	35%
Atlantic	50%



Most say that they would include water conservation measures as part of their next home renovation.



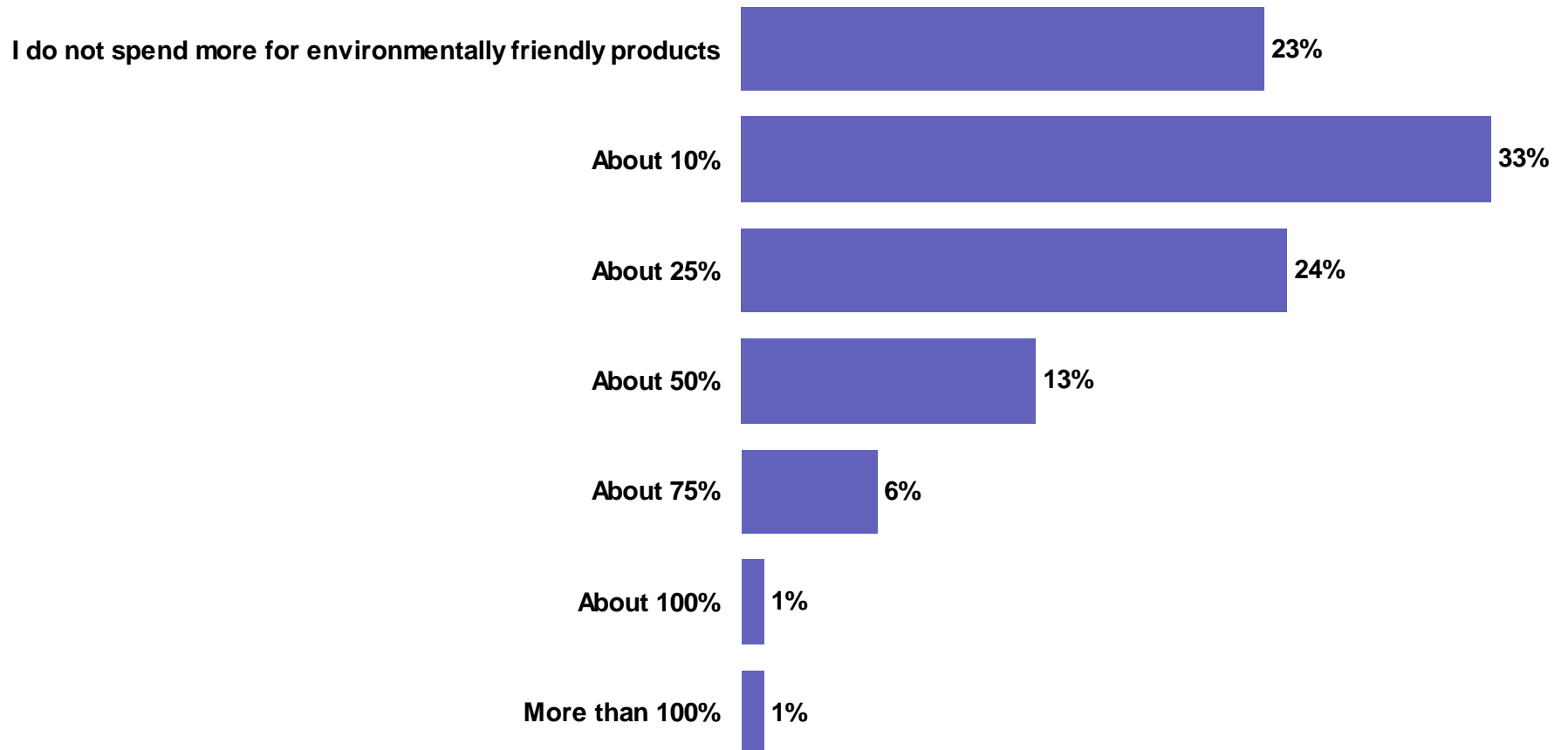


Western Canadians are more likely than central or eastern Canadians to say that they would include these measures in their next home renovations.

	% likely (top2box)
18-34	75%
35-54	75%
55+	75%
Men	72%
Women	78%
BC	79%
Alberta	81%
Sask./Man.	79%
Ontario	78%
Quebec	66%
Atlantic	74%



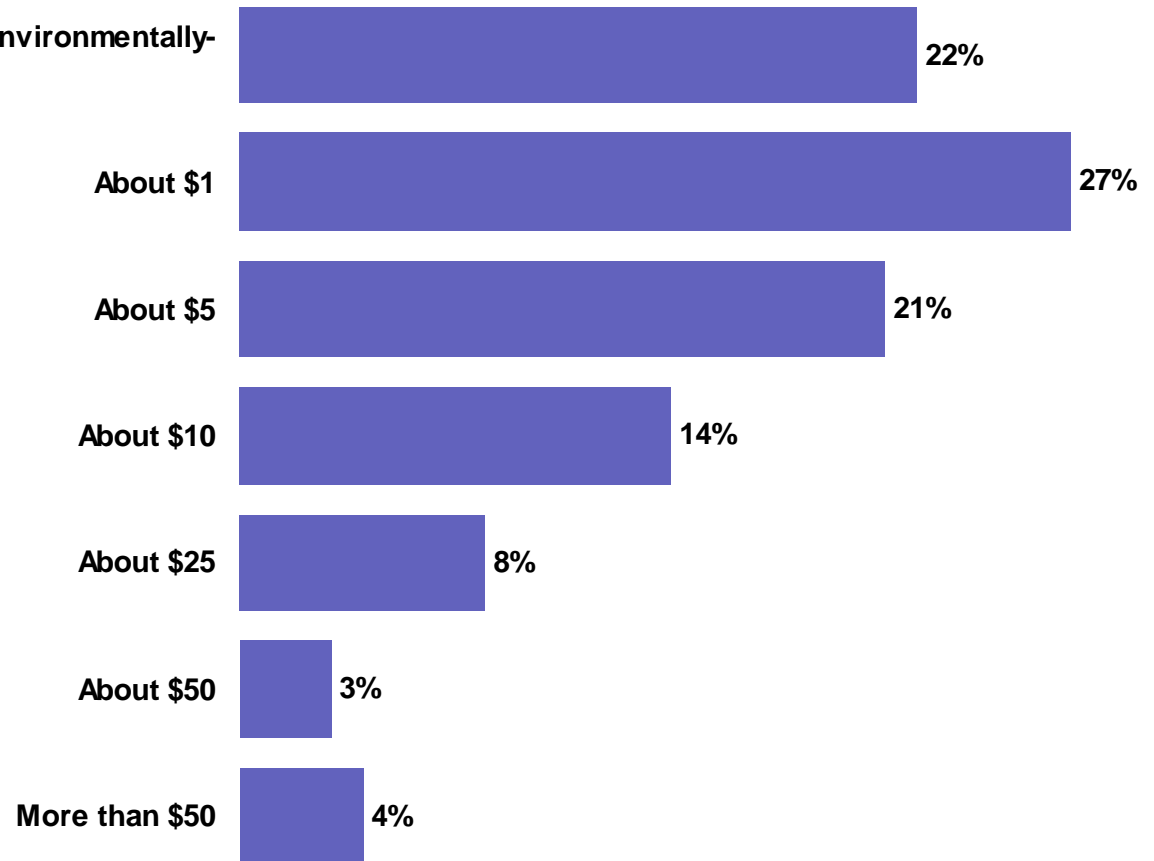
A majority are willing to spend a little more for environmentally-friendly products.





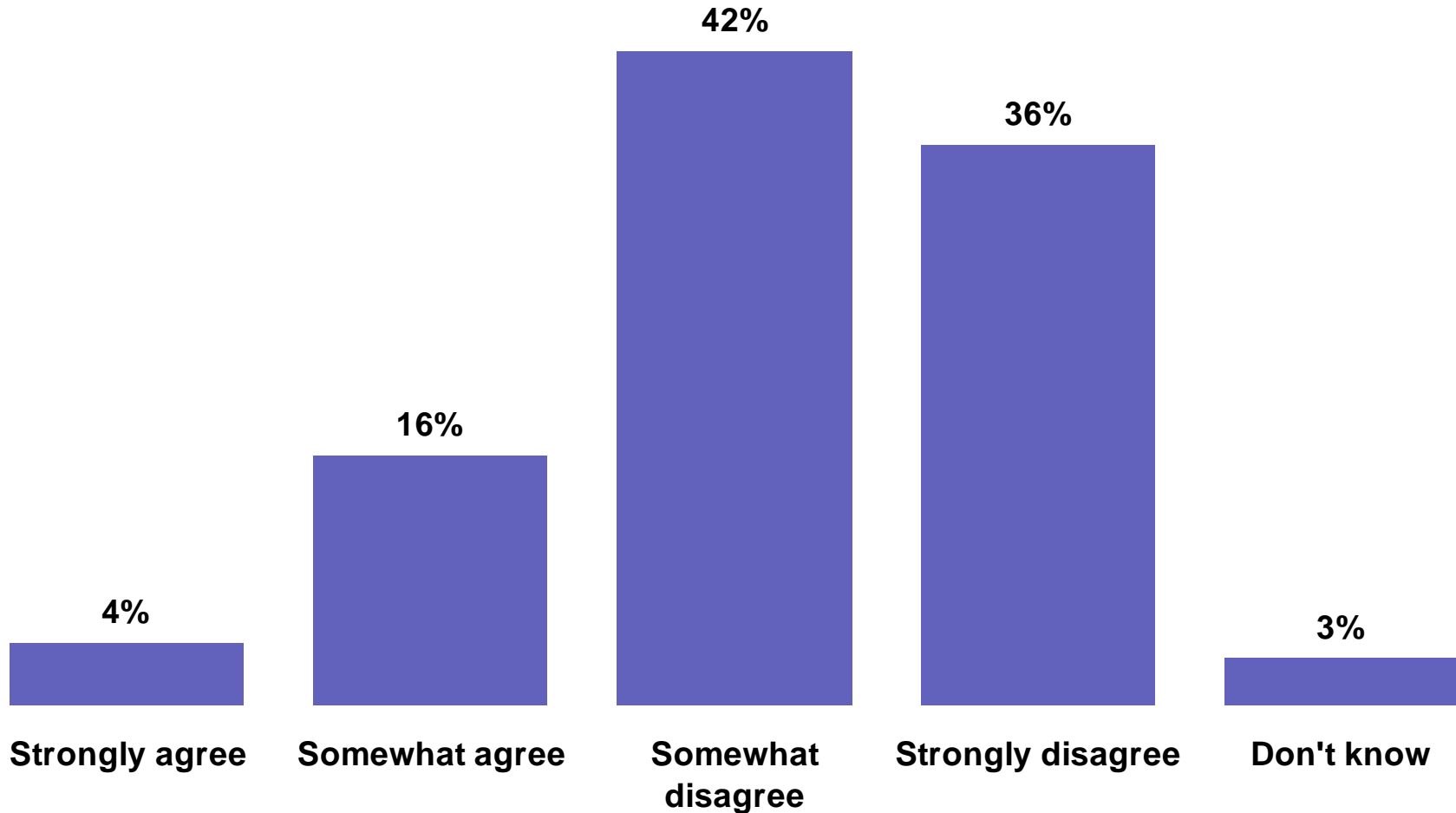
The same holds true in dollar figures.

I would not be willing to spend more for environmentally-friendly products





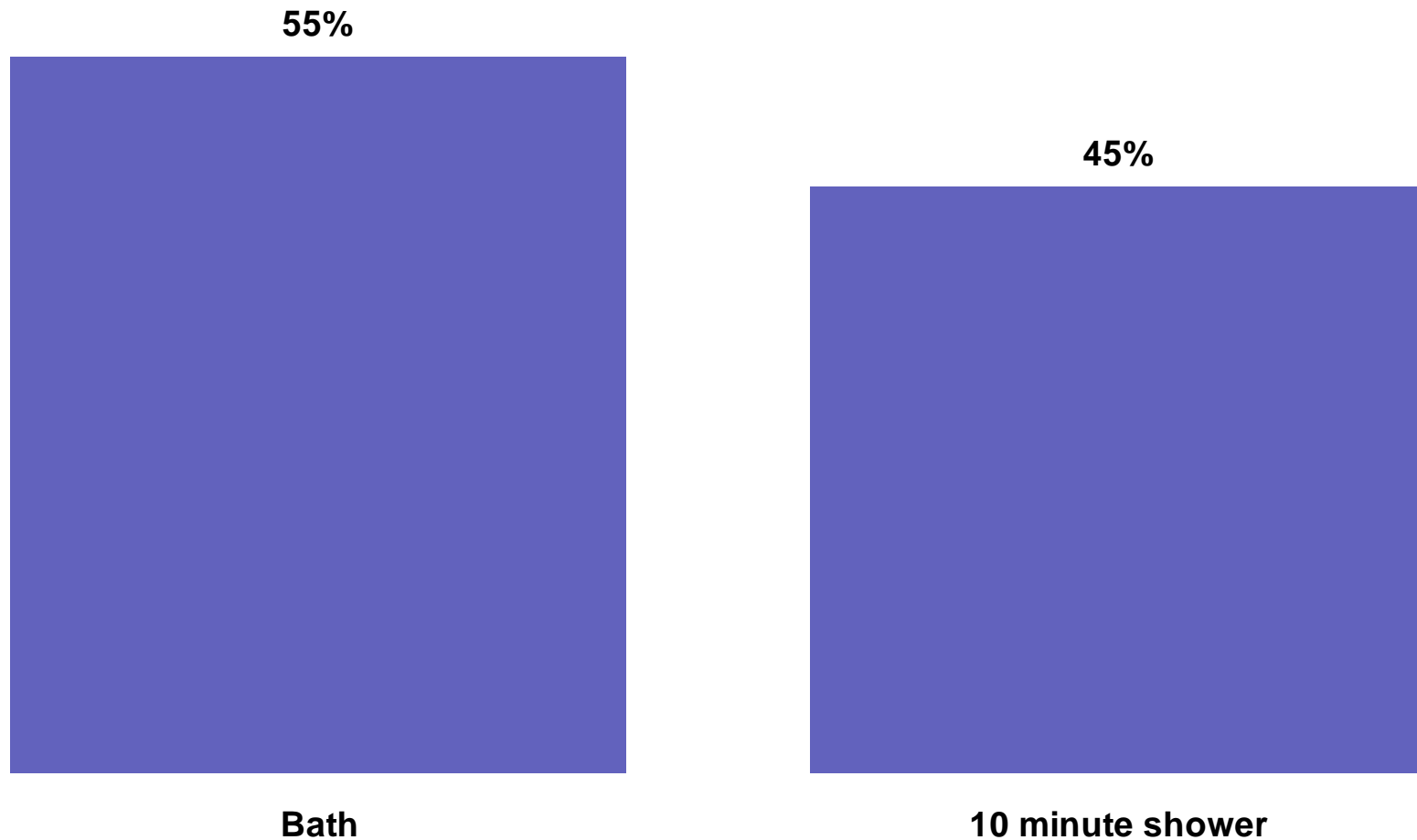
Most disagree that Canadians use just enough fresh water for their daily needs.



Q21. Do you agree or disagree that Canadians use just enough freshwater for their daily needs, and do not use more freshwater than is necessary? Base: All respondents N=2309

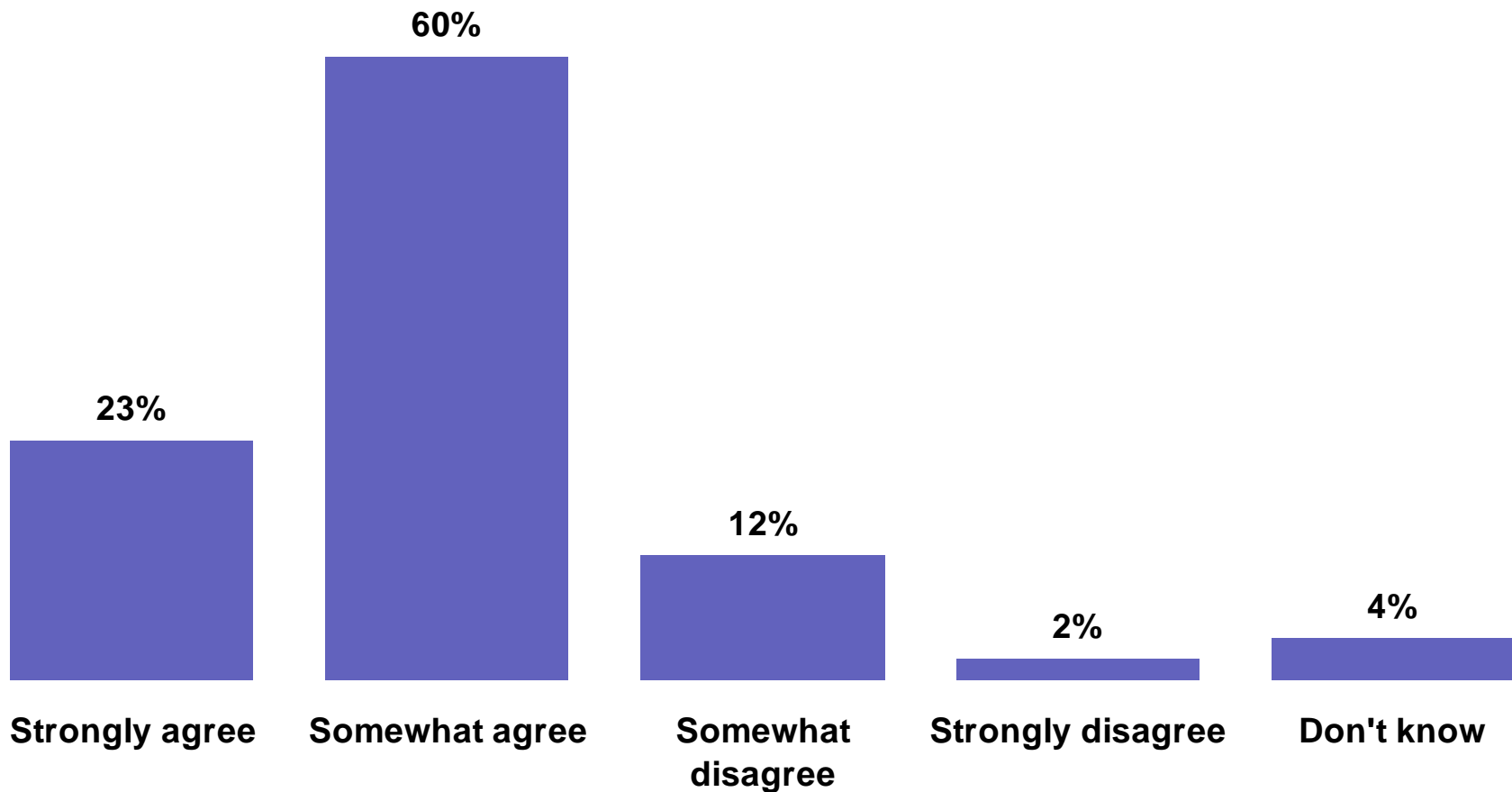


A majority believes that a bath uses more water than a 10-minute shower.



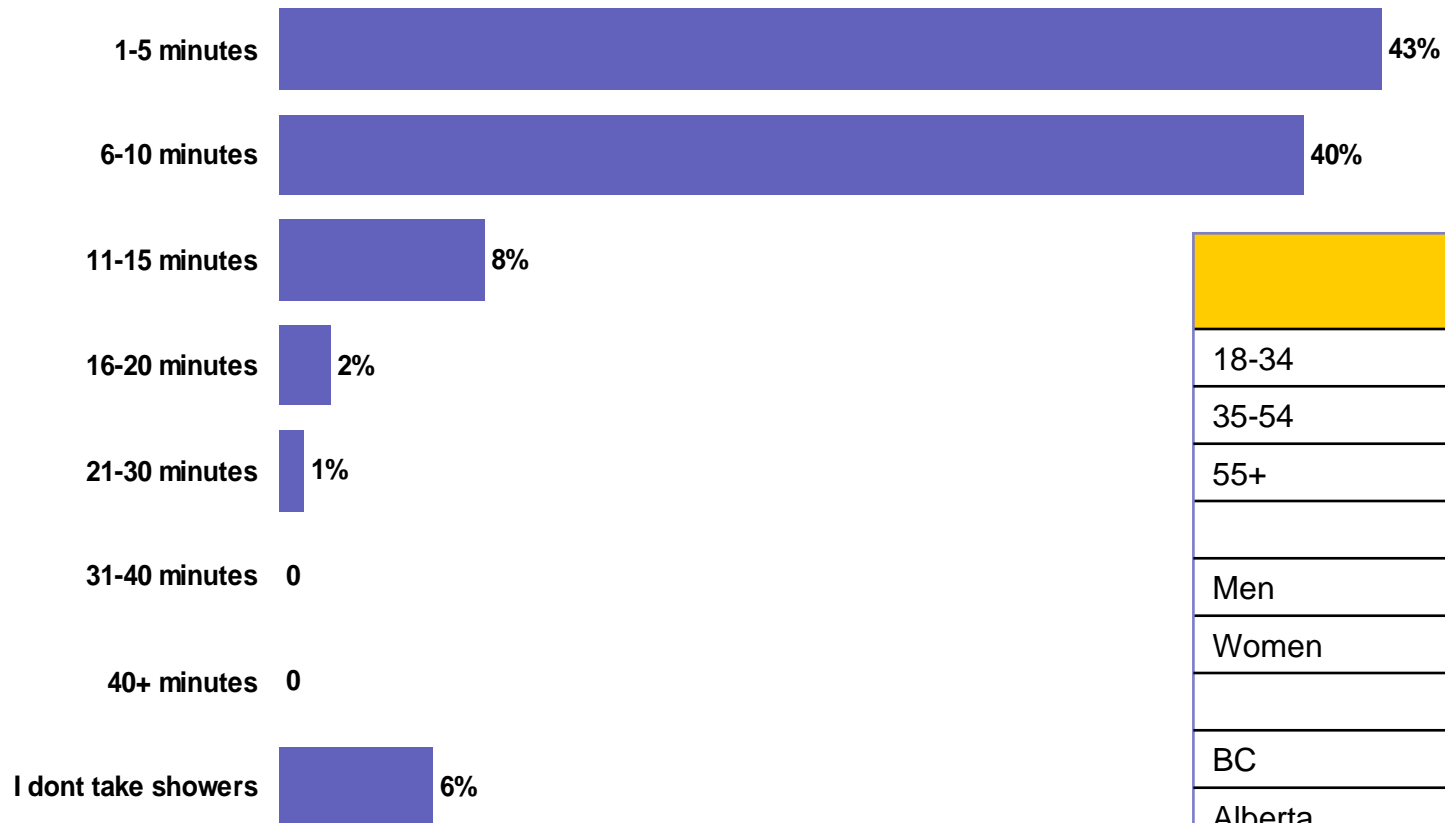


Canadians agree that the current level of consumption of fresh water is an issue. But it does not appear that concern is critical at this point.





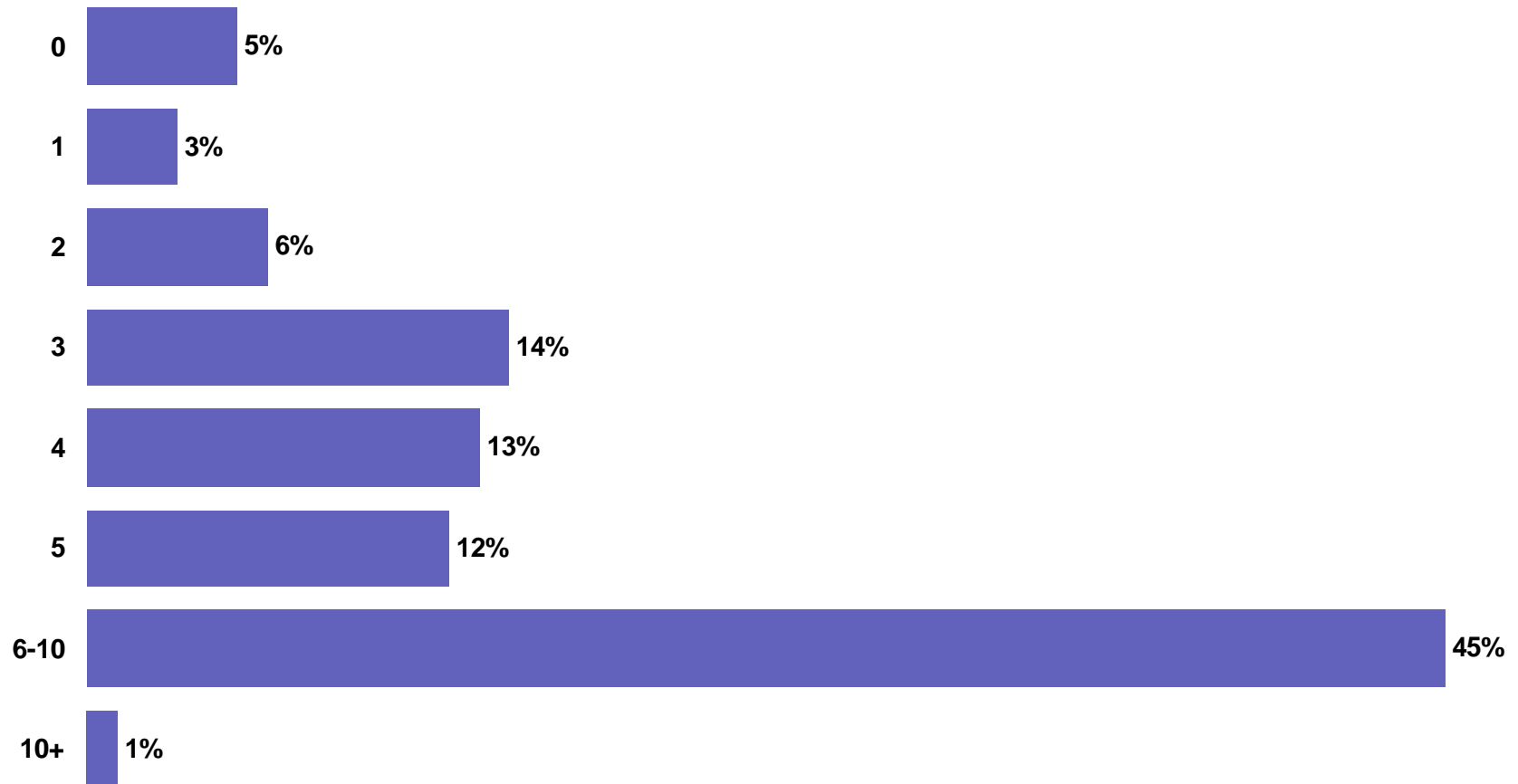
Canadians spend an average of 7.6 minutes in the shower.



	Average minutes
18-34	9.6
35-54	7.4
55+	6.3
Men	7.3
Women	7.9
BC	7.3
Alberta	8.4
Sask./Man.	7.1
Ontario	7.8
Quebec	7.4
Atlantic	7.6

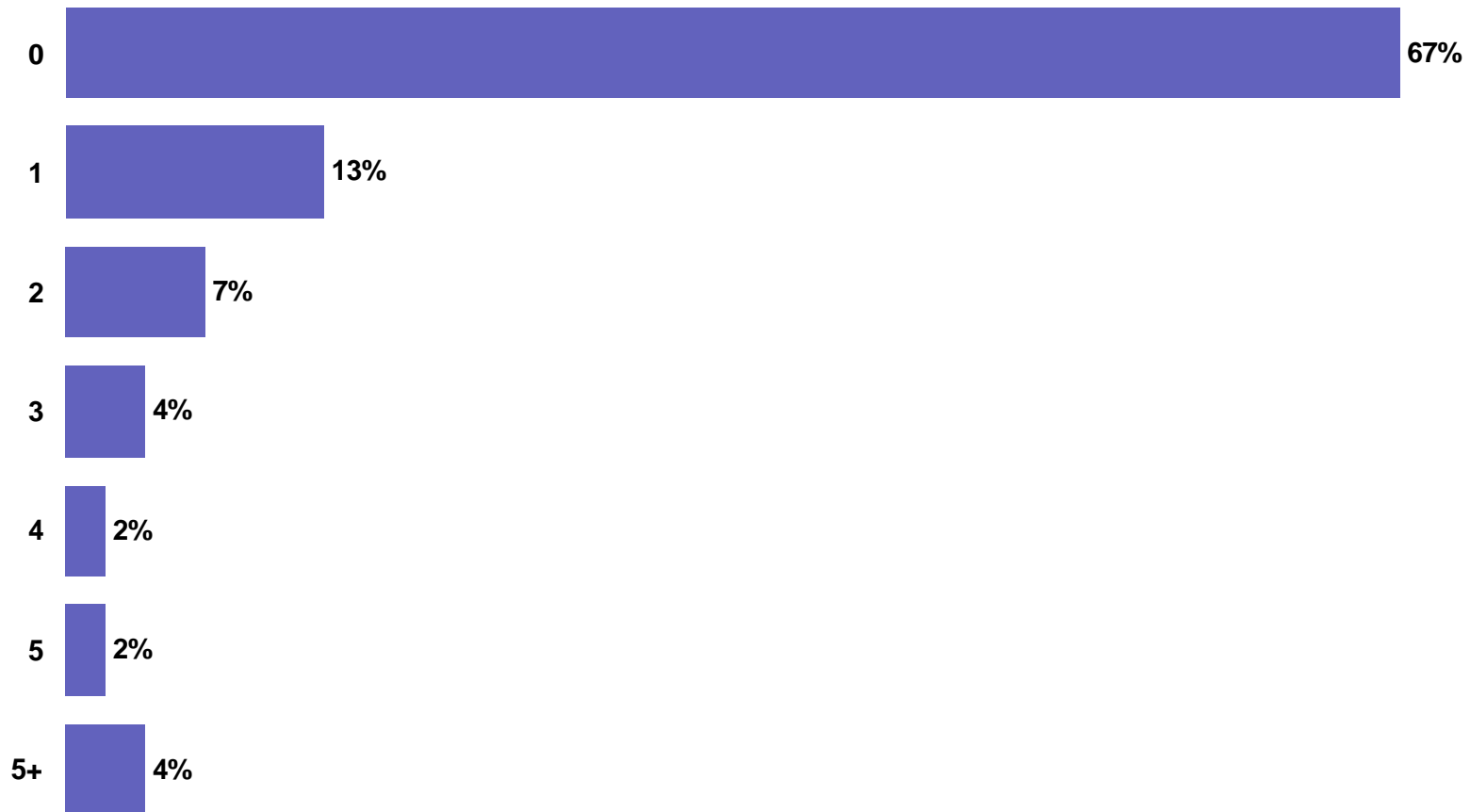


Canadians, on average, take 5 showers a week.



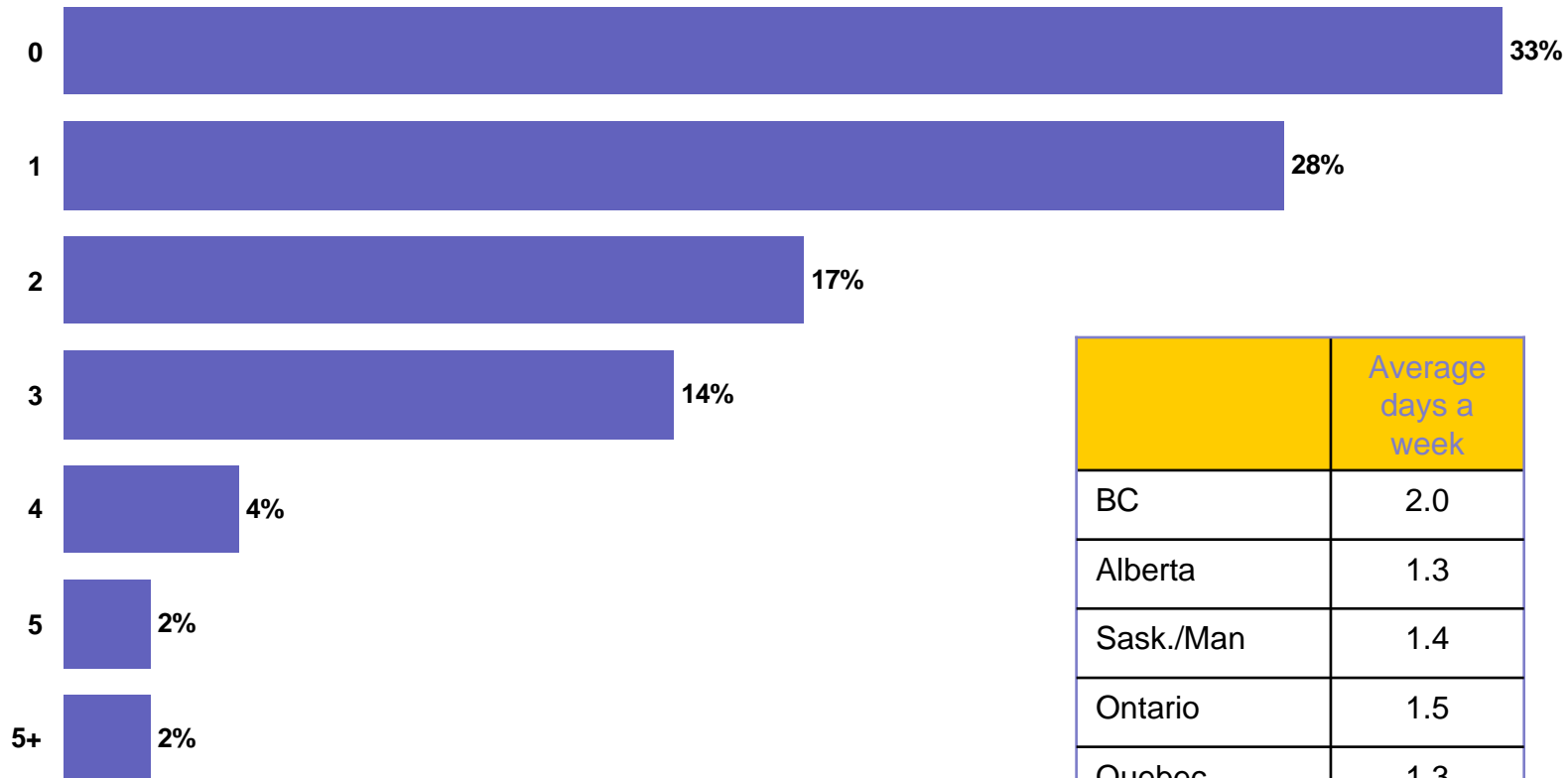


Canadians, on average, take 0.8 baths a week.





Canadians, on average, water their lawns 1.5 times a week in the summer months.

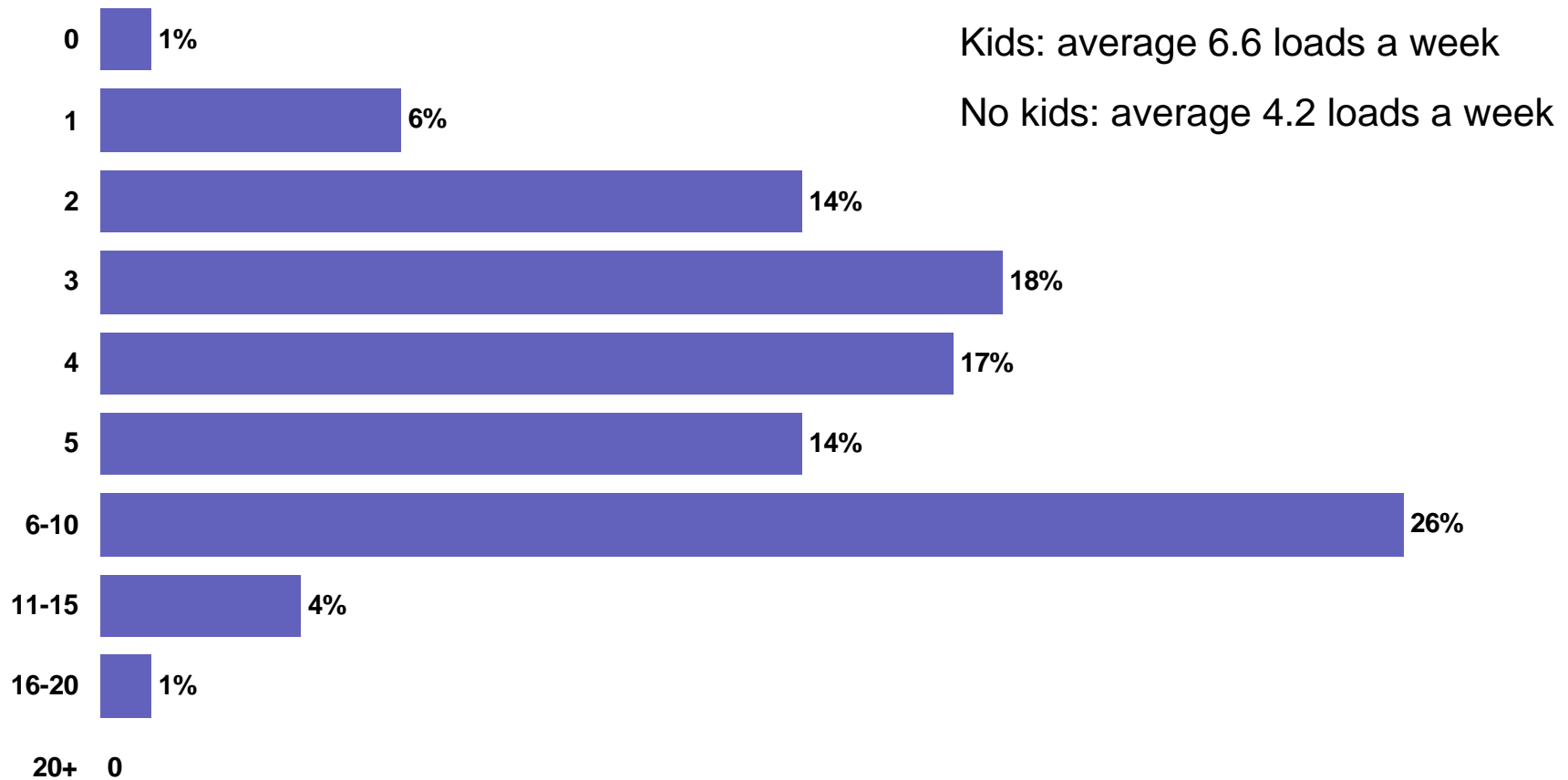


	Average days a week
BC	2.0
Alberta	1.3
Sask./Man	1.4
Ontario	1.5
Quebec	1.3
Atlantic	1.3

Q27. During the summer months (June, July, August), how many times a week do you typically water your lawn, garden and flowers? Base: All respondents N=2309

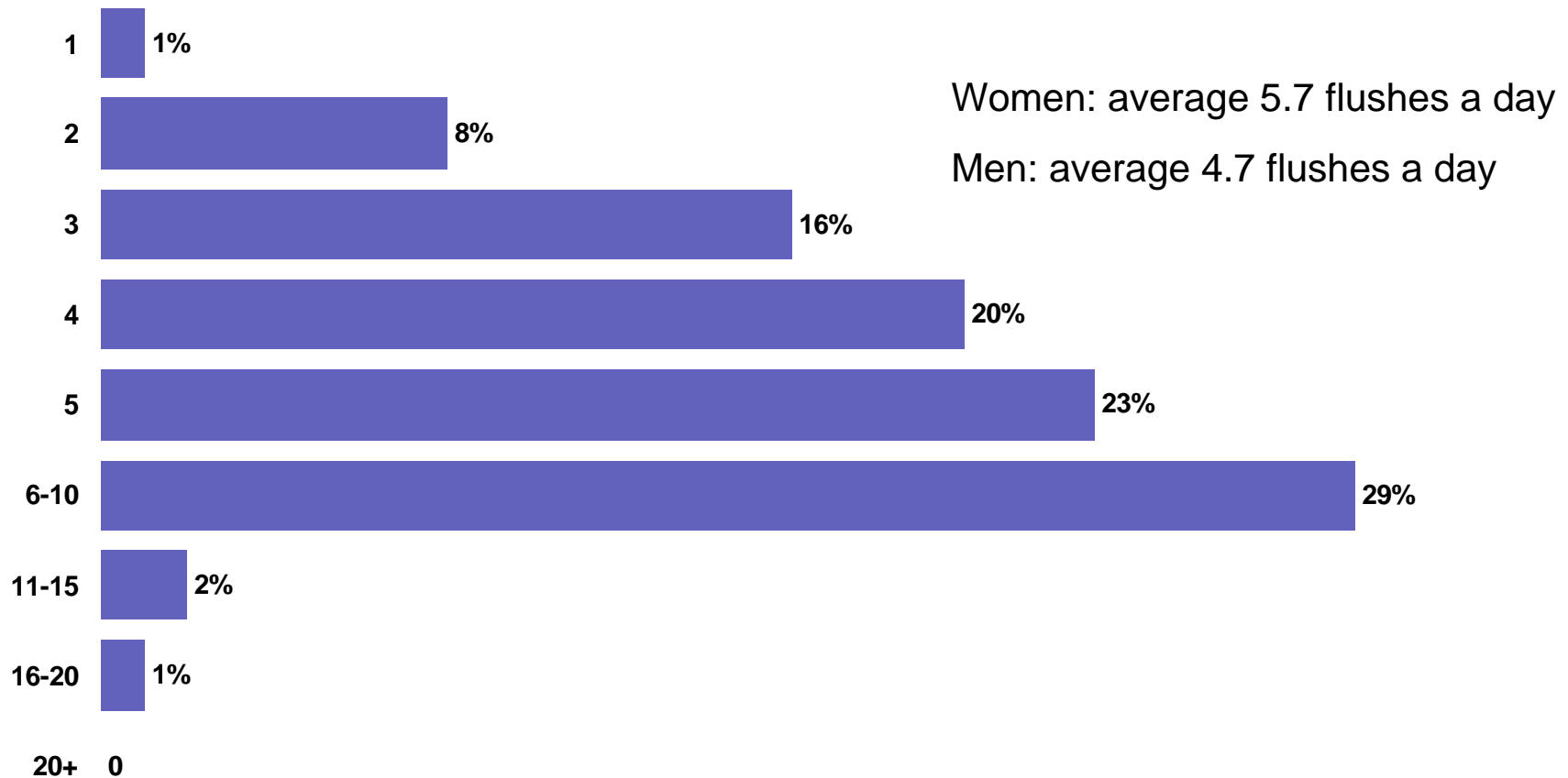


Predictably, those with kids do about 50% more loads of laundry than those who don't have kids.



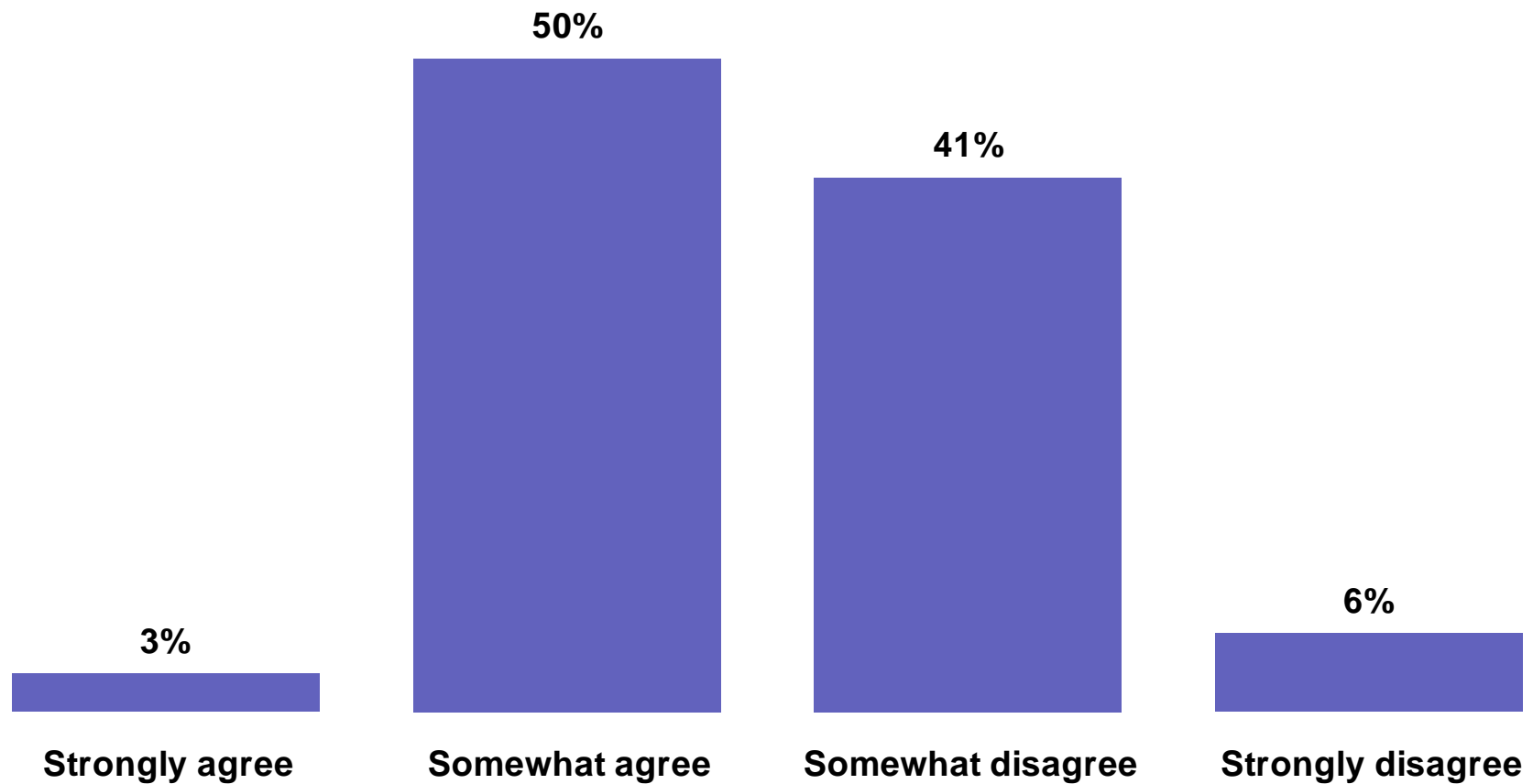


On average, Canadians flush their toilet 4.9 times a day.





Clearly, Canadians think that they could be making a bigger effort in Conserving fresh water.



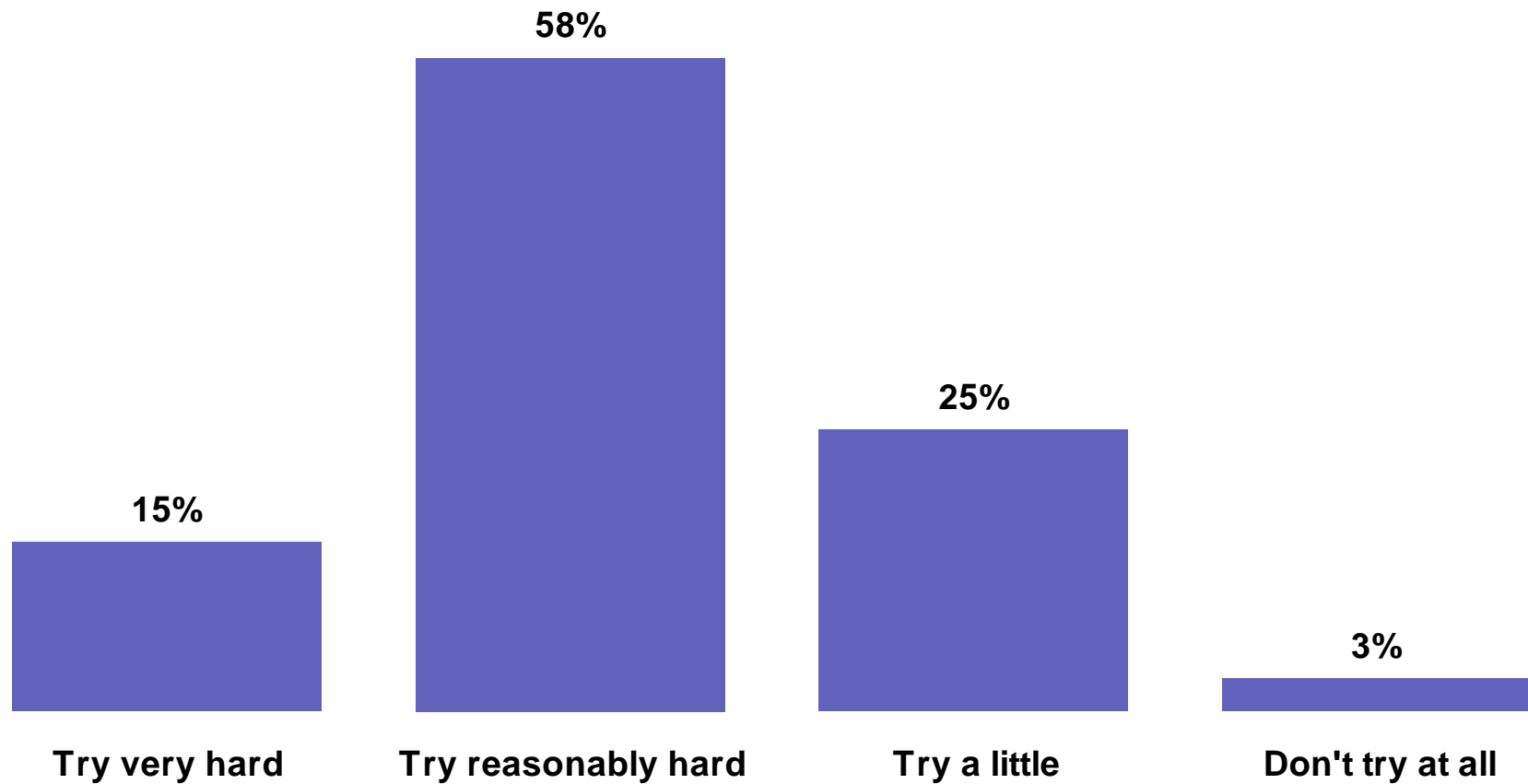


Quebecers are considerably less likely to believe that Canadians are making reasonable efforts to conserve fresh water...

	% Agree Top2Box
18-34	49%
35-54	55%
55+	55%
Men	50%
Women	55%
BC	57%
Alberta	50%
Sask./Man.	60%
Ontario	57%
Quebec	42%
Atlantic	55%



...this despite the fact that most Canadians say they're trying at least 'reasonably hard'...





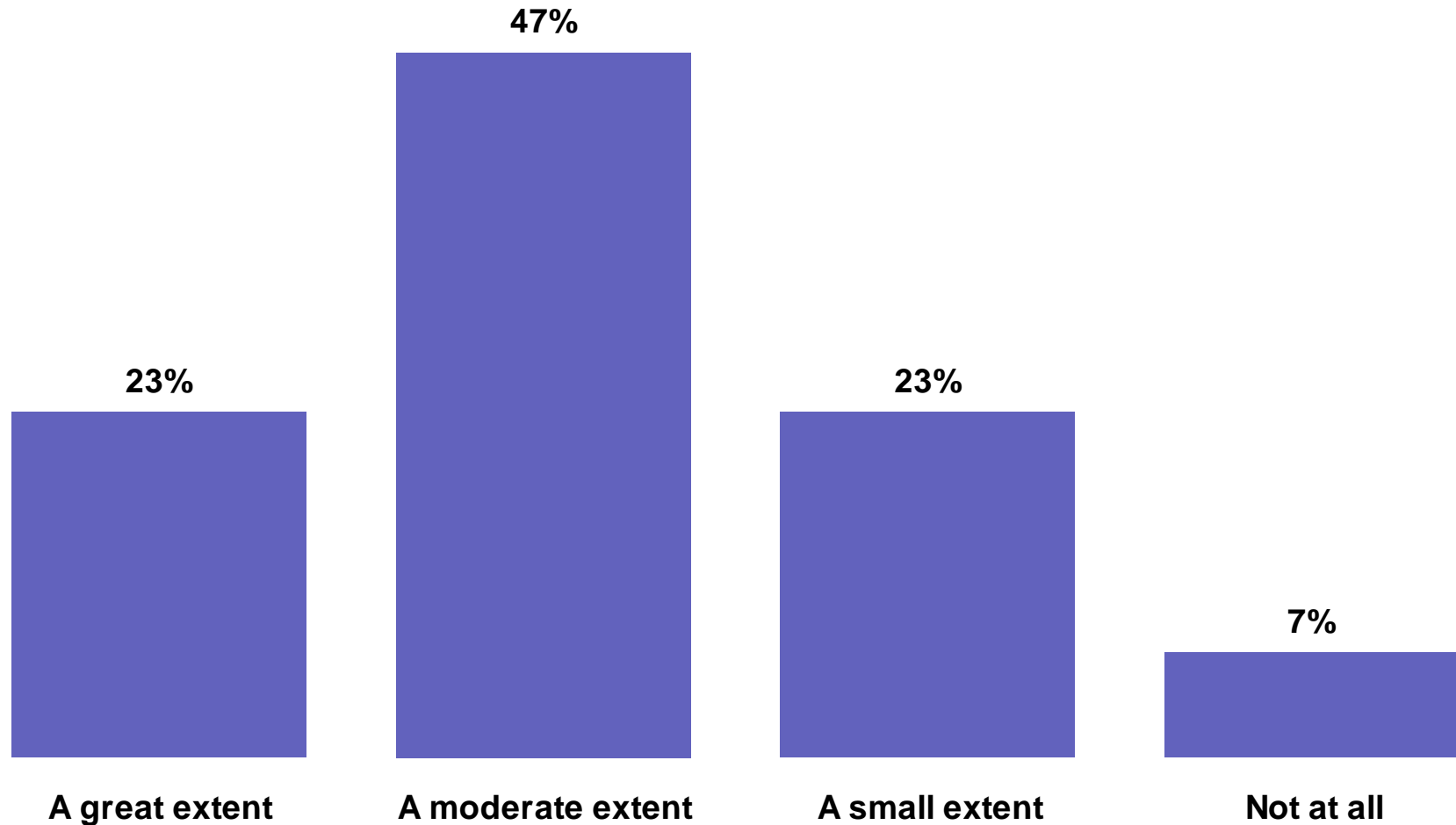
...with Quebecers being the most likely to say that they're trying hard.

	% Agree Top2Box
18-34	70%
35-54	73%
55+	73%
Men	66%
Women	77%
BC	70%
Alberta	64%
Sask./Man.	59%
Ontario	71%
Quebec	87%
Atlantic	68%

Income
<\$30,000: 81%
\$30,000 - \$60,000: 75%
>\$60,000: 68%



Seven in ten say that fresh water conservation is influencing their purchasing decisions.



Q32. To what extent does freshwater conservation influence your purchasing decisions for household products or appliances? Base: All respondents N=2309

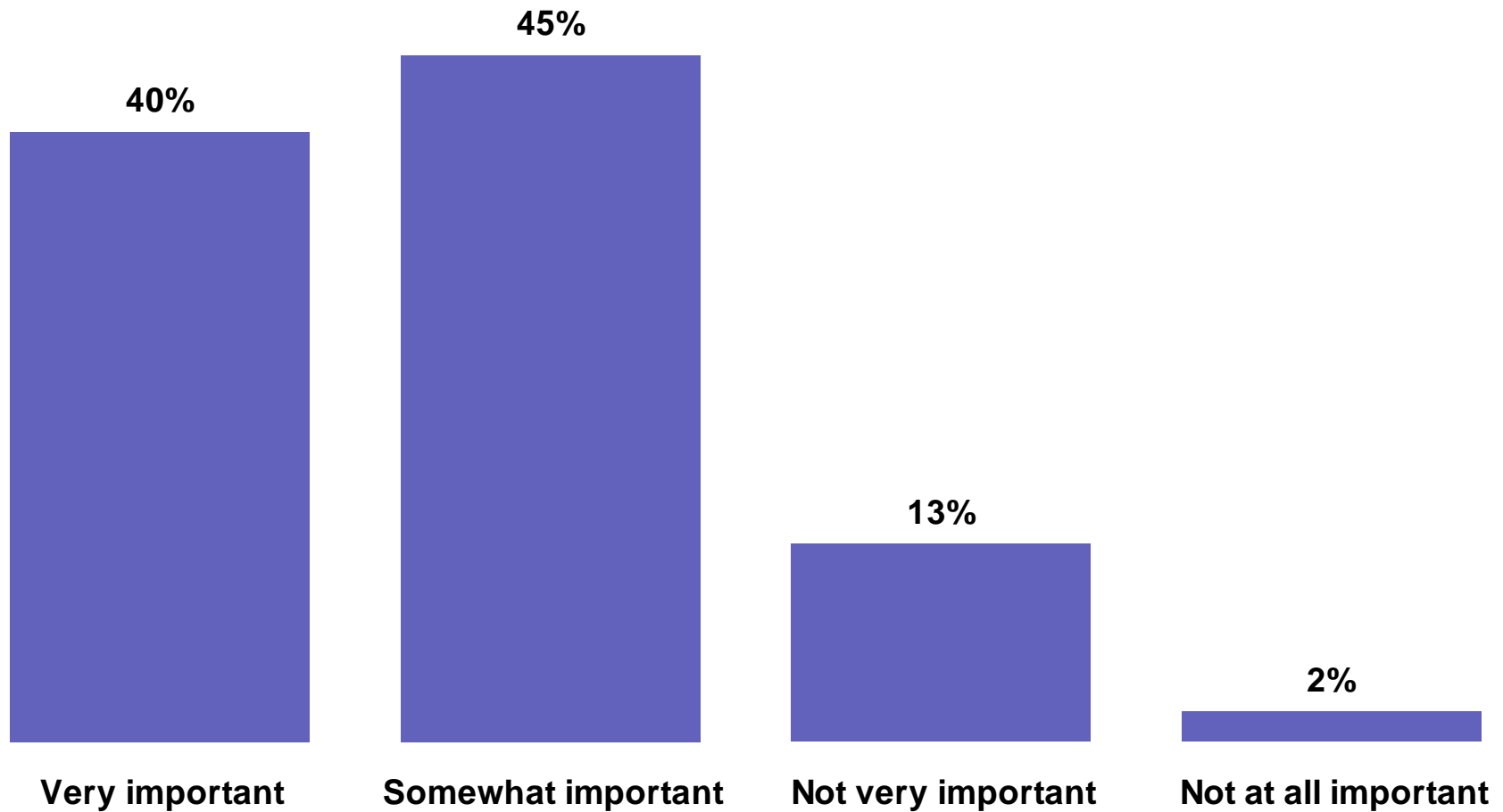


But older Canadians and Quebecers are more likely than others to say that this is the case.

	% Great/Moderate Extent
18-34	66%
35-54	70%
55+	73%
Men	64%
Women	75%
BC	69%
Alberta	69%
Sask./Man.	65%
Ontario	68%
Quebec	78%
Atlantic	67%

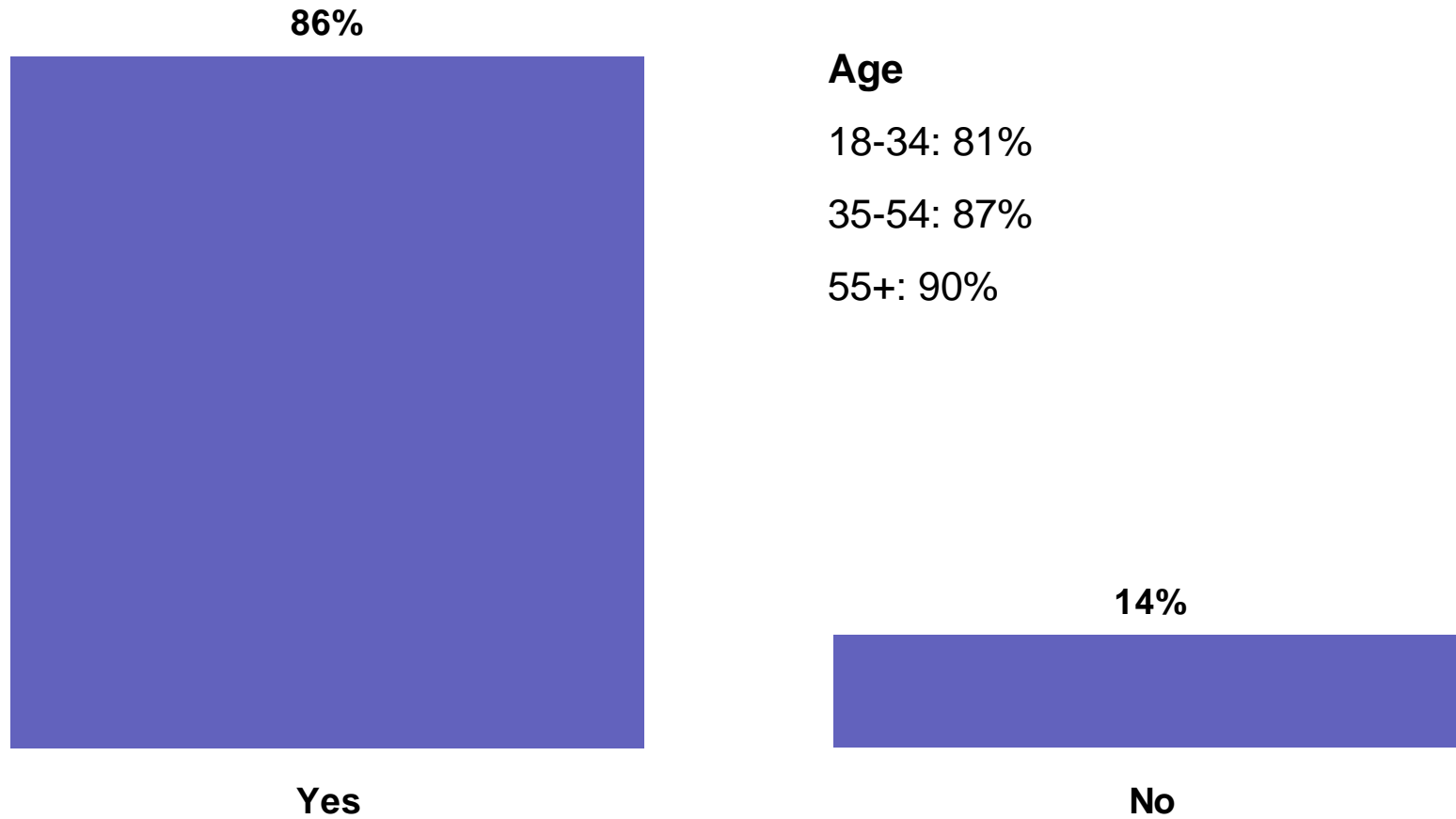


Most say that it is important for companies and corporations they do business with to conserve fresh water.



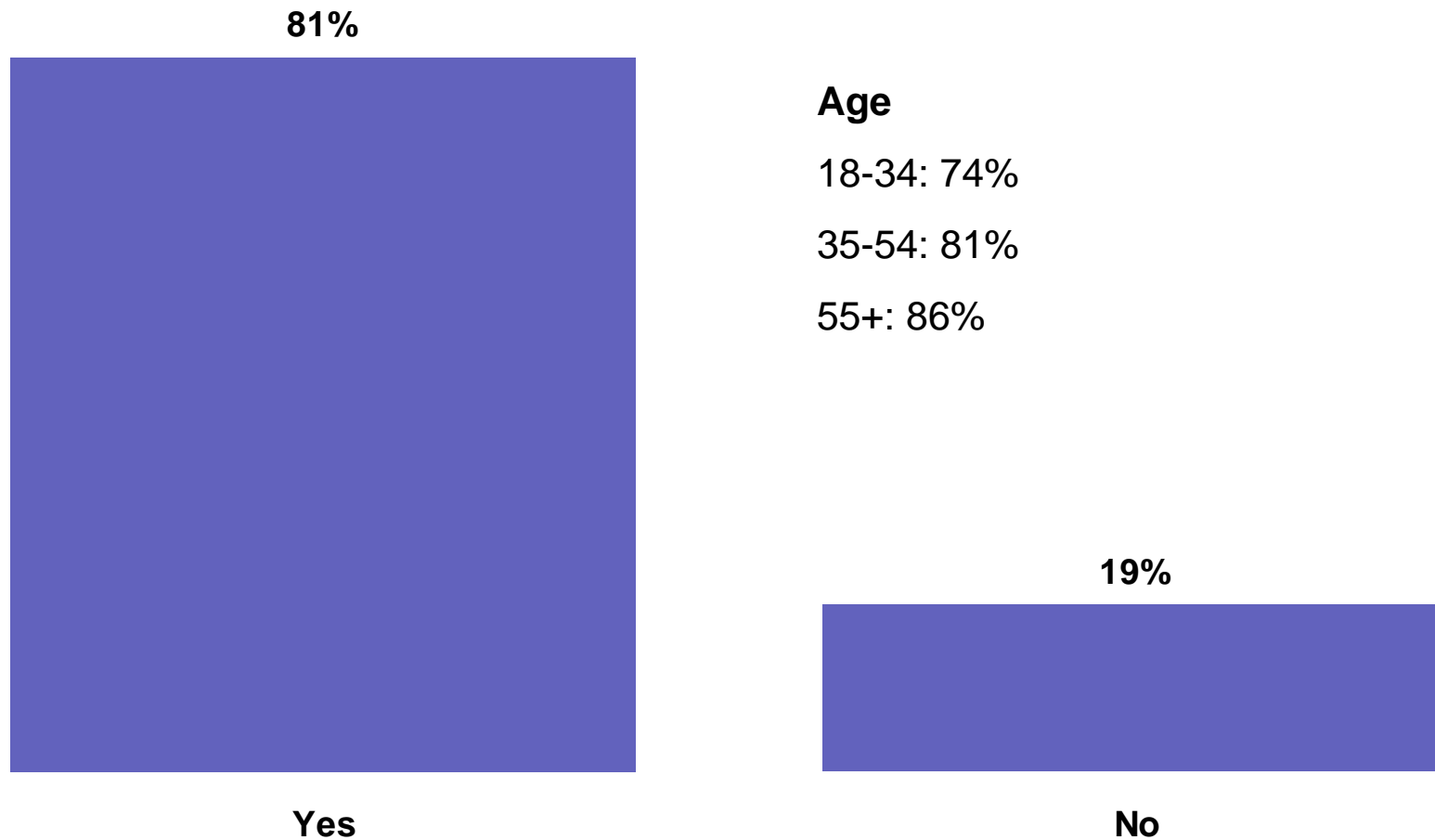


Almost all would boycott products known to pollute water.



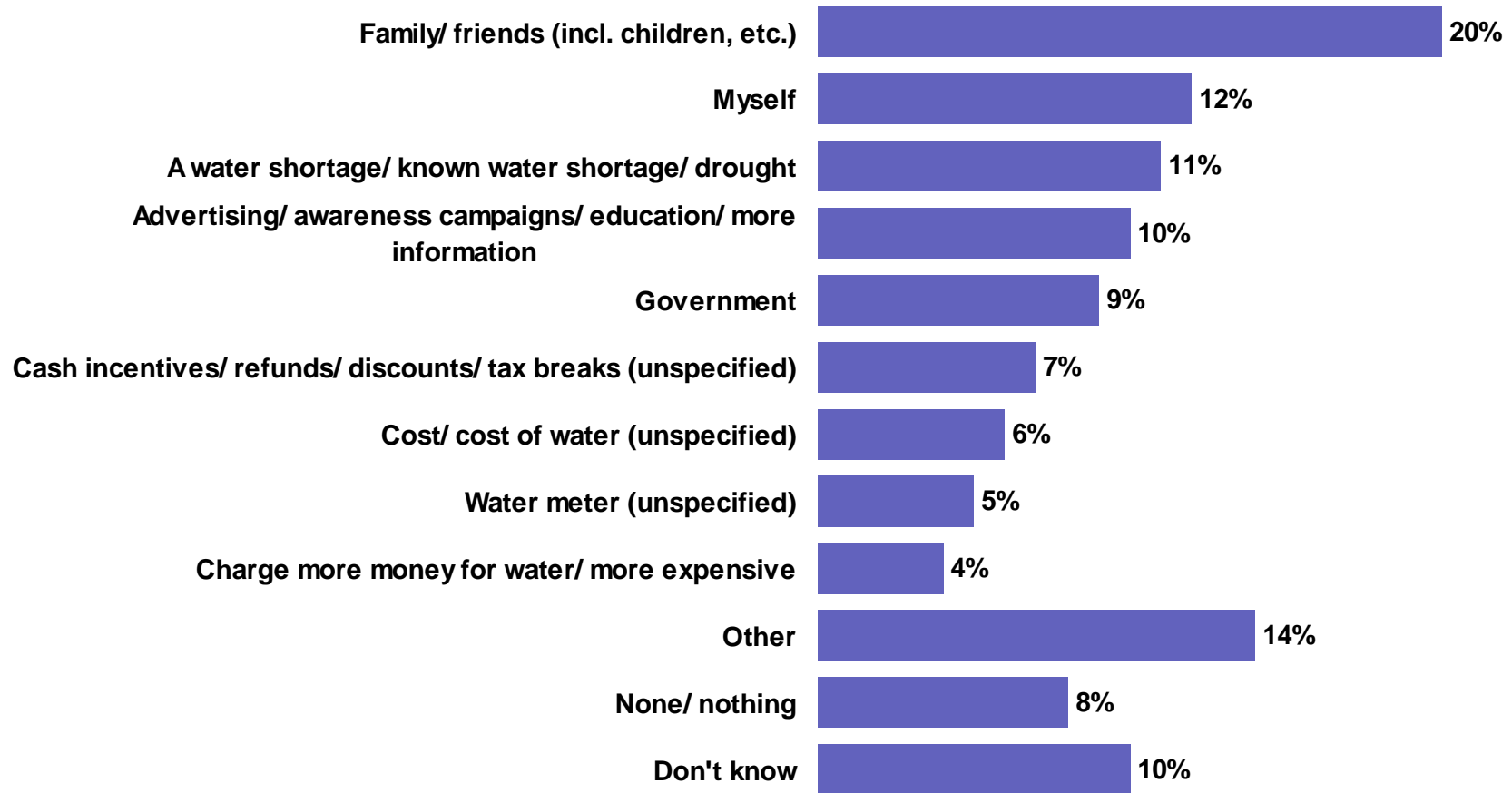


And a similar proportion say they would boycott products known to misuse water.



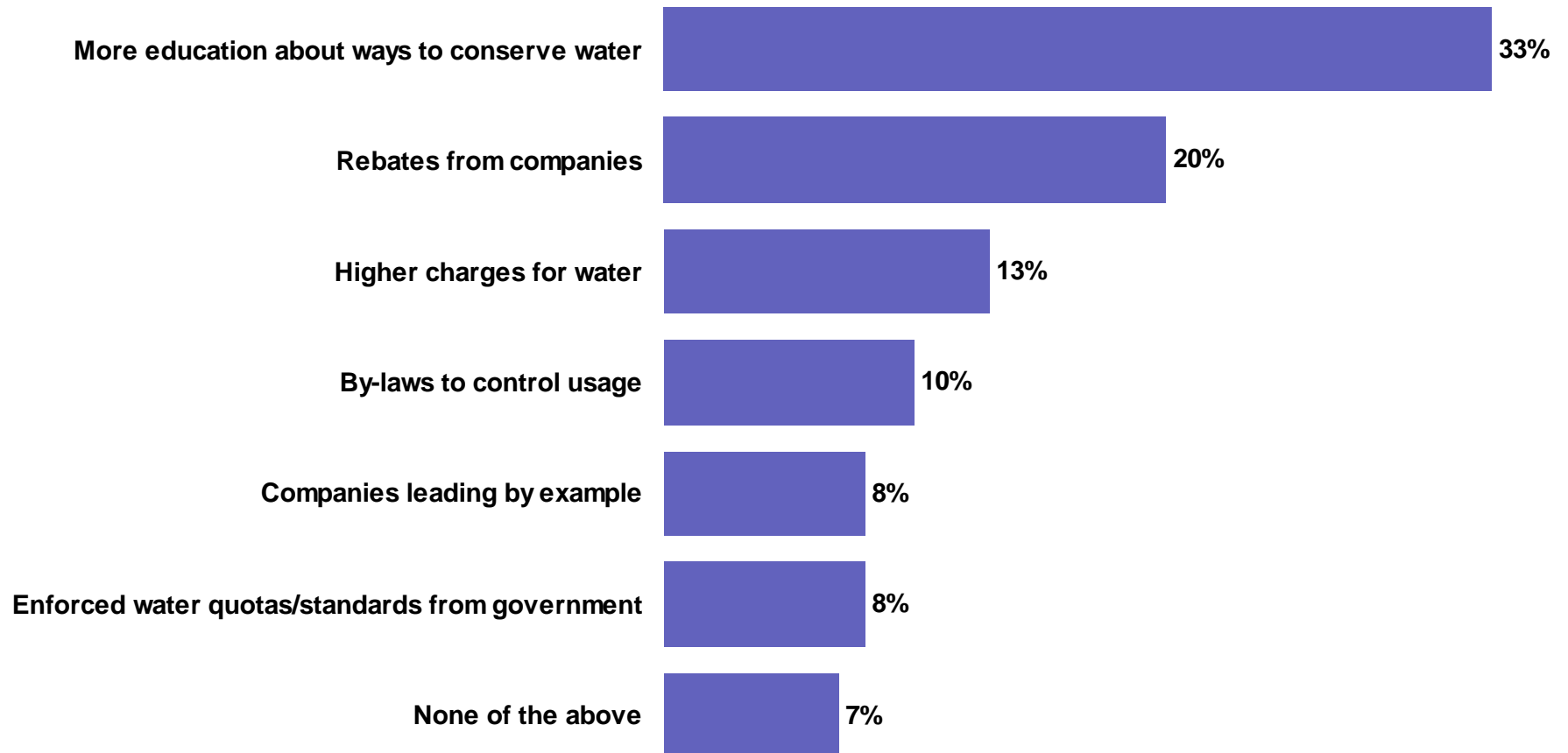


It appears that Canadians are most encouraged by those close to them when it comes to conserving fresh water at home.



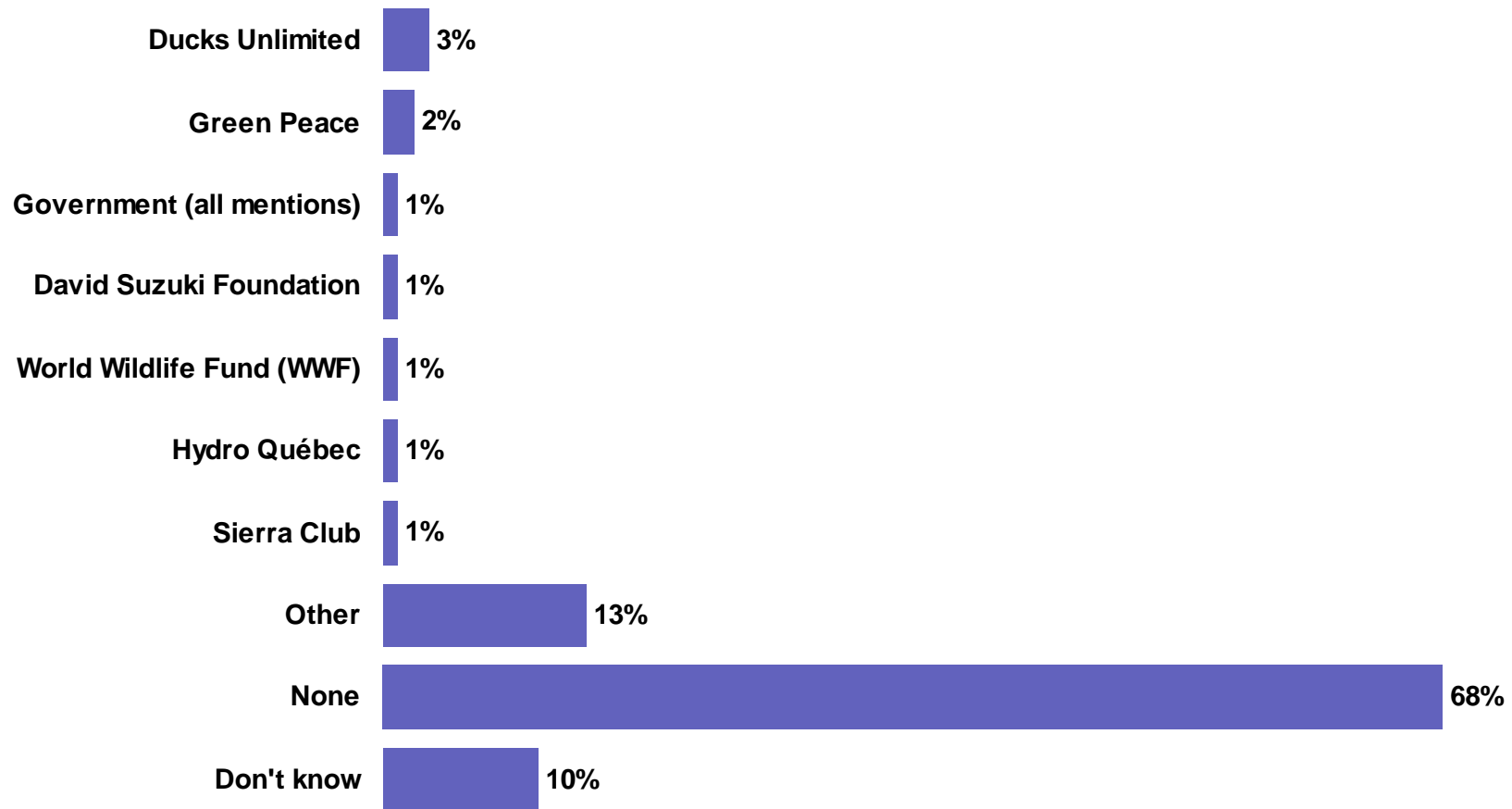


More information, coupled with financial carrots and sticks, are the most likely factors to encourage Canadians to conserve more fresh water.



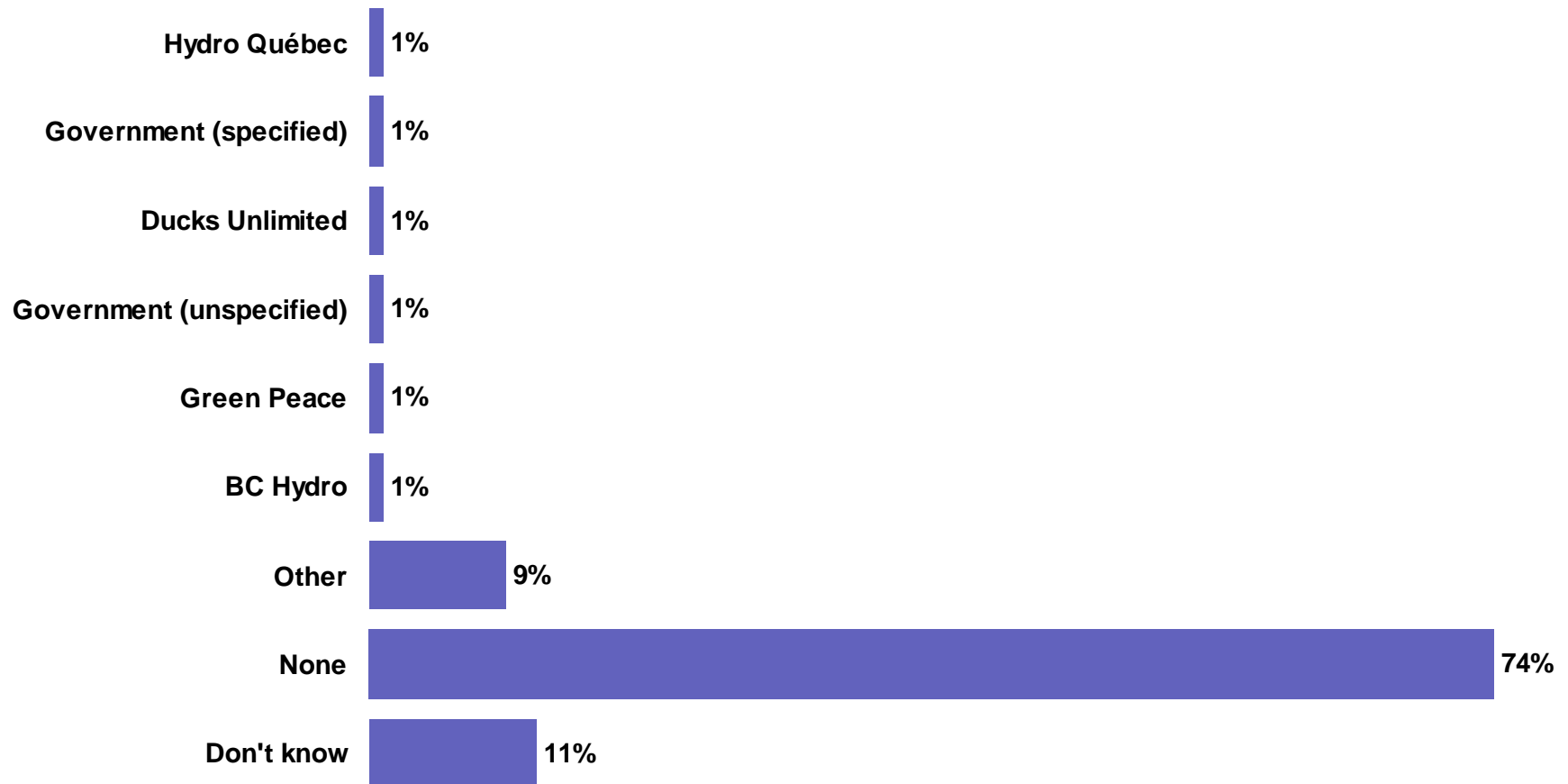


Most cannot name any organizations that are promoting the Conservation of fresh water.





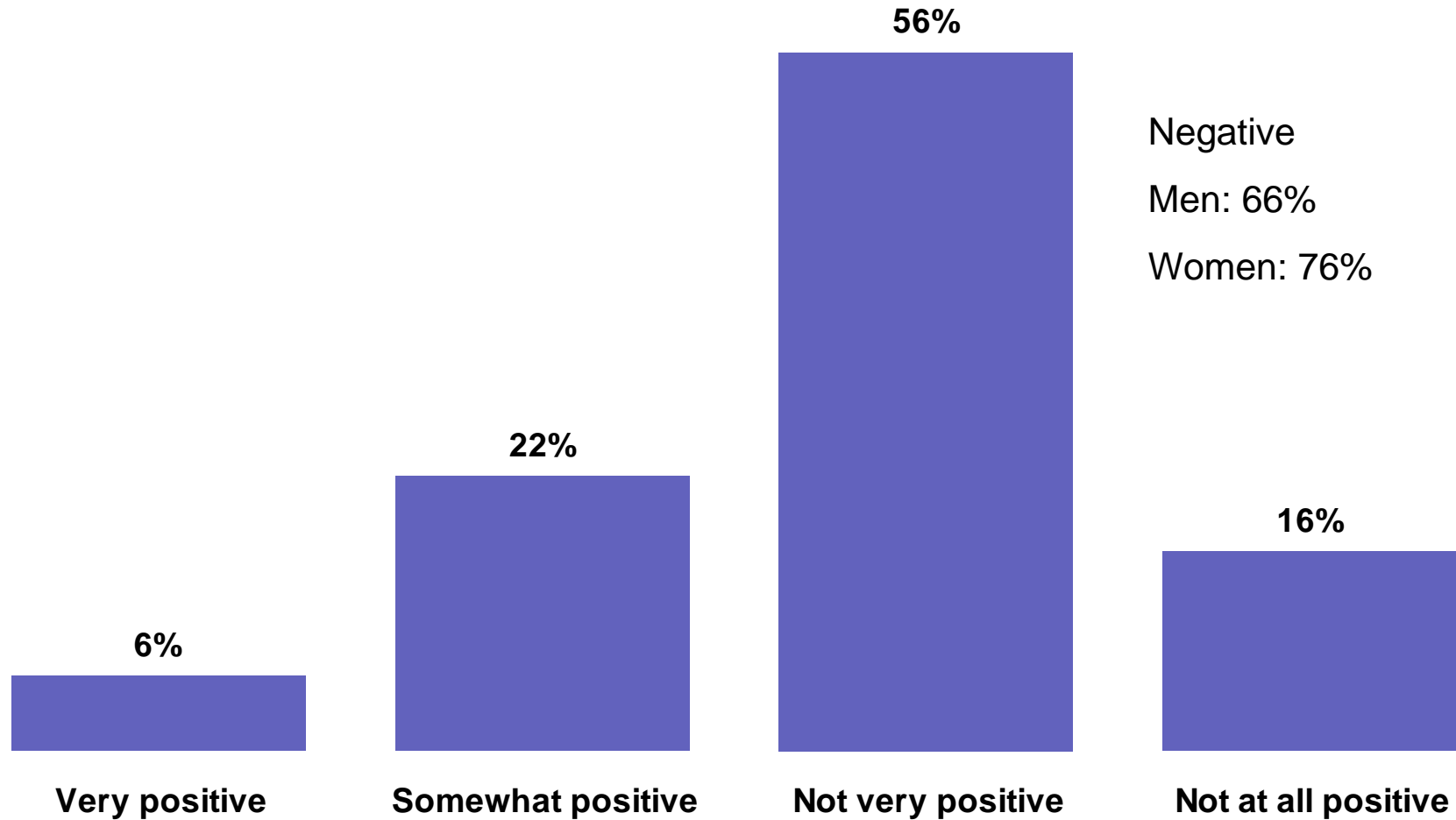
Even fewer can name businesses or companies that are working to educate Canadians about our freshwater supply or ways to conserve.



Q39. And, top of mind, can you name any Canadian businesses or companies that are working to educate Canadians about our freshwater supply and ways to conserve? Base: All respondents N=2309



Most believe that climate change will not have a positive effect on Canada's fresh water supply.

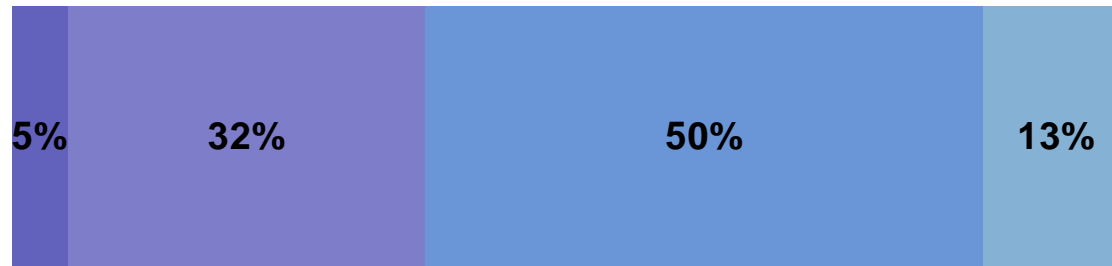




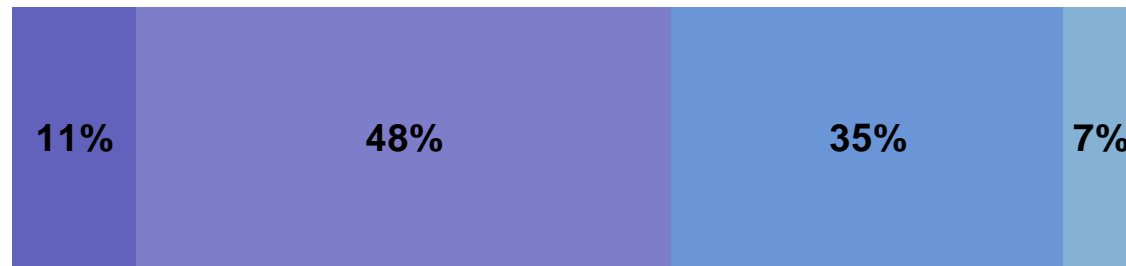
When it's all said and done, more Canadians believe there is a problem of Canada's fresh water quality than with the supply of Canada's fresh water.

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree

Canada has a freshwater shortage problem



Canada has a freshwater quality problem





Women are much more inclined to believe that Canada has problems in this regard.

Canada has a fresh water shortage problem	% Agree
18-34	39%
35-54	34%
55+	39%
Men	29%
Women	43%
BC	41%
Alberta	43%
Sask./Man.	36%
Ontario	43%
Quebec	27%
Atlantic	32%

Canada has a fresh water quality problem	% Agree
18-34	55%
35-54	59%
55+	60%
Men	51%
Women	64%
BC	53%
Alberta	52%
Sask./Man.	56%
Ontario	61%
Quebec	61%
Atlantic	56%



Thank you. Questions?

FOR MORE INFORMATION

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