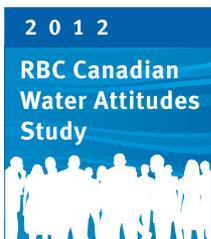




2012 RBC Canadian Water Attitudes Study



RBC
Blue Water
Project™

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A note from RBC

In 2007, RBC launched the RBC Blue Water Project, a 10-year, \$50 million commitment to helping protect and preserve the world's freshwater resources.

Protecting water matters to RBC because:

- There's only so much water on earth. (It's a limited resource).
- Every living thing needs water to survive. (This matters to our employees and our families).
- Water is needed for everything. It's needed to grow our food, manufacture goods and produce energy. (This matters to our thousands of business and corporate clients from virtually every industry sector).
- The world's limited water resources are under stress from climate change, population growth and pollution. (This presents a risk to our clients who depend on water in their businesses).
- Droughts, flooding, water scarcity and water pollution are causing serious humanitarian, environmental and economic problems worldwide. (This matters to everyone).

Most Canadians take water for granted. We think we have lots of it and it will always be there. So in 2008, RBC started polling Canadians about their attitudes towards water—to see if the serious water issues around the world might be having an impact on how we use and think about water.

2012 marks the fifth annual Canadian Water Attitudes Study, and RBC is making it freely available to NGOs and other interested parties, and we encourage the broad dissemination of the data and its findings. We hope the information helps contribute to a healthy conversation about the value and vulnerability of water in Canada.

You are welcome to refer to, reprint or redistribute this information, and we ask that you attribute the source as the “2012 RBC Canadian Water Attitudes Study.”

Lynn Patterson

Director, Corporate Responsibility and RBC Blue Water Project
RBC

A note on methodology from GlobeScan

- Sample of 2,428 Canadian adults from GMI's Canadian panel participated in an online survey
- Online survey took place between February 1st, 2012 – February 15th, 2012.
- 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.
- 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=2,248) would be plus or minus 2.0 percent 19 times out of 20.

The survey questions and results reported herein are provided on a confidential basis to RBC. RBC is free to use the findings in whatever manner it chooses, including releasing them to the public or media.

GlobeScan Incorporated subscribes to the standards of the World Association of Opinion and Marketing Research Professionals (ESOMAR). ESOMAR sets minimum disclosure standards for studies that are released to the public or the media. The purpose is to maintain the integrity of market research by avoiding misleading interpretations. If you are considering the dissemination of the findings, please consult with us regarding the form and content of publication. ESOMAR standards require us to correct any misinterpretation.

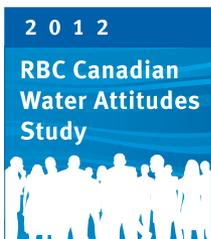
Project: 2496, GlobeScan®

Notes to Readers

- Please note that 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 in the bottom of each page
- Where data are available, we provide tracking information from previous years using trend charts and tables.
- As a general rule of thumb differences of +/- 4% between years are considered to be significant differences. These differences are marked with red and green arrows throughout this report.



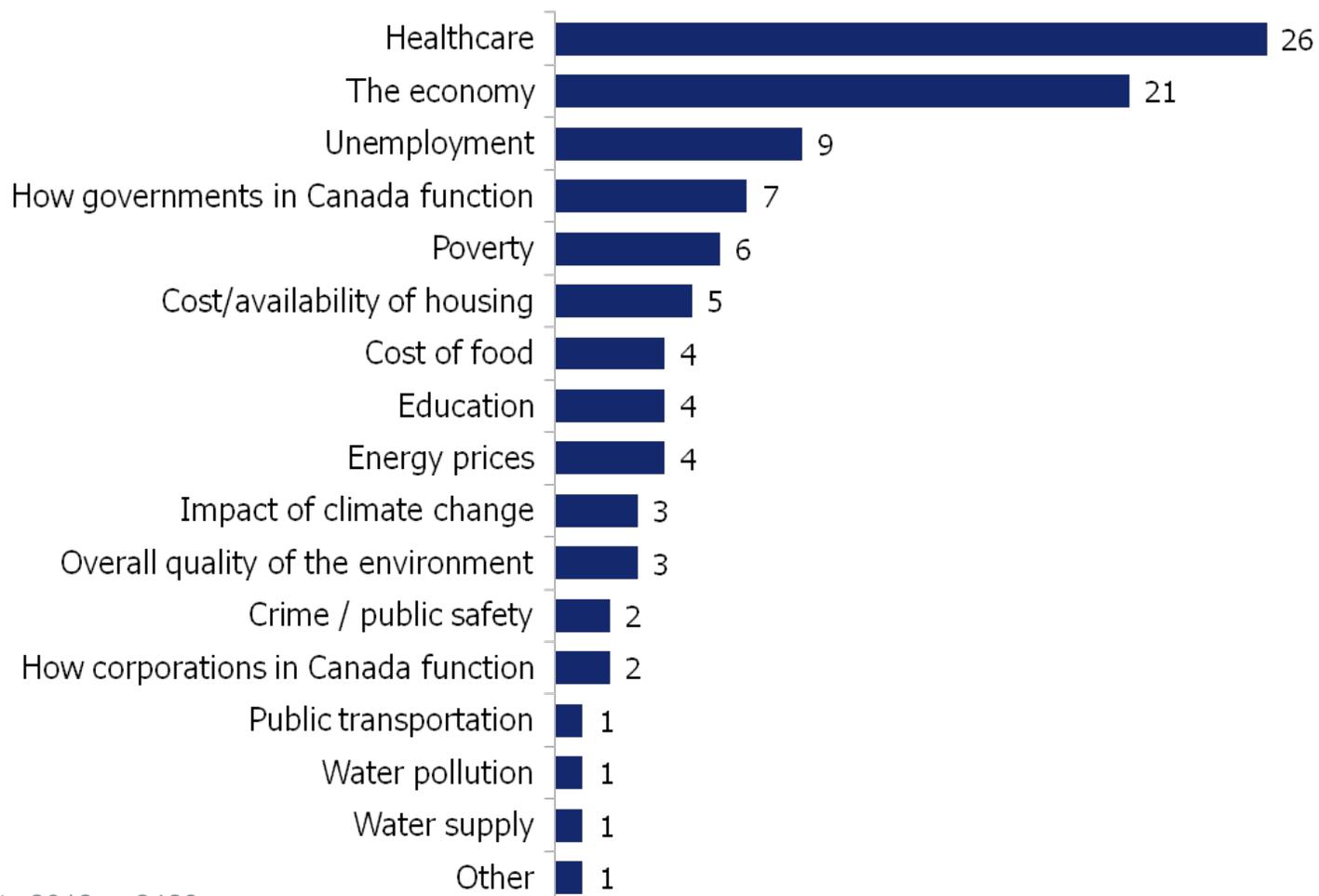
Issues Context



While Canadians rank healthcare as the most important national issue, water pollution and supply are not considered a top priority

Most Important Issues Facing Canada

First Mention, 2012



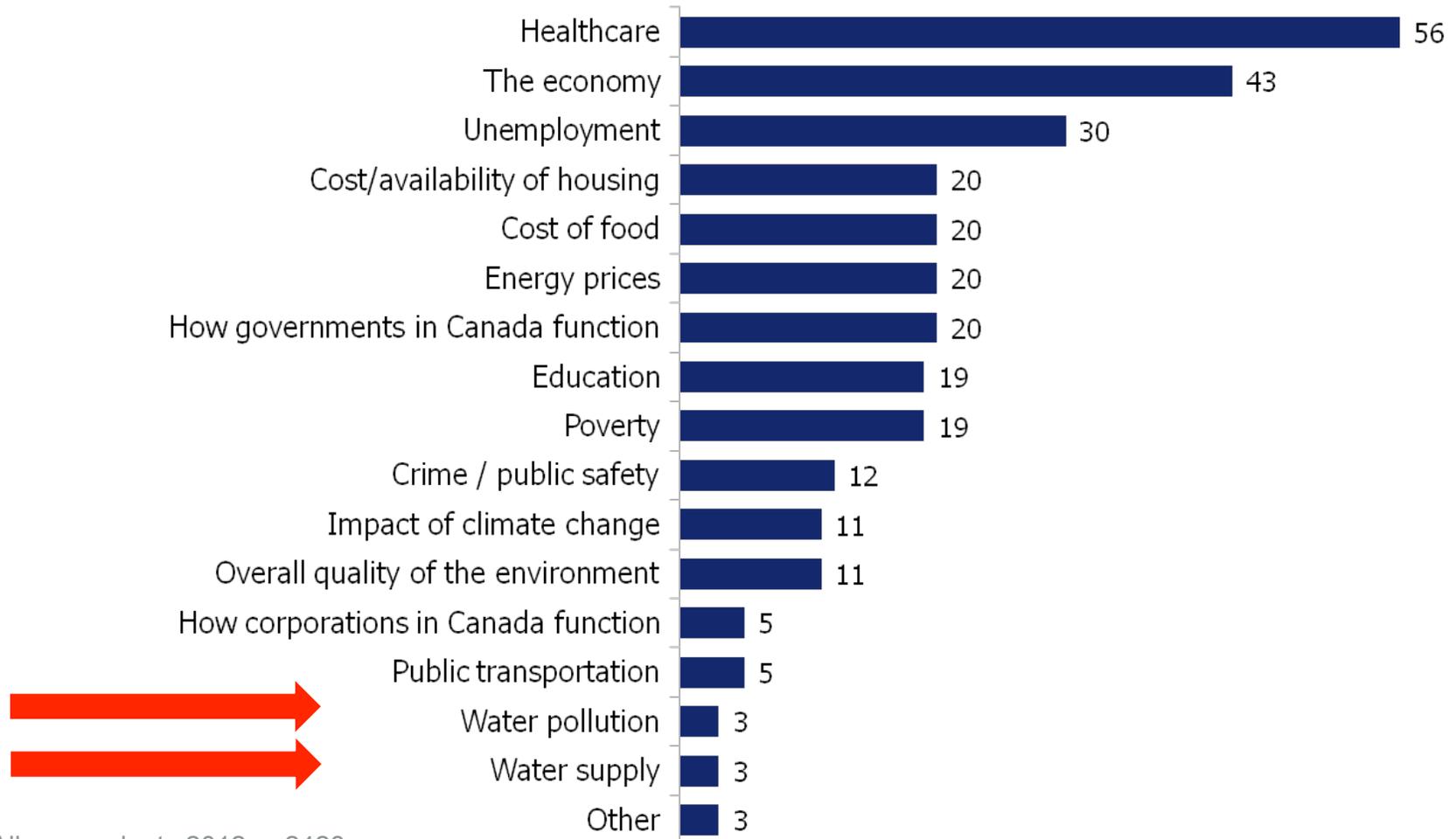
Base: All respondents 2012 $n=2428$

- 7 Q1. What do you think are the three most important issues facing Canada? Please select up to three from the list below, in order of importance.

Canadians consider water issues much less important compared to other national issues such as healthcare, the economy, and unemployment

Most Important Issues Facing Canada

Total Mentions, 2012



Base: All respondents 2012 *n*=2428

- 8 Q1. What do you think are the three most important issues facing Canada? Please select up to three from the list below, in order of importance.

Most Important Issues Facing Canada

Total Mentions, by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Healthcare	52	56	61	49	64	64	47	56	63	51	60	53	59	61
The economy	45	45	40	48	34	42	38	45	47	47	40	44	43	43
Unemployment	32	22	13	38	22	33	33	33	23	29	30	31	28	27
Cost/availability of housing	35	21	28	18	14	7	24	20	14	20	19	25	13	11
Cost of food	20	25	13	17	20	30	17	20	22	18	22	18	24	21
Energy prices	14	21	11	23	15	34	14	20	25	20	19	14	26	30
How governments in Canada function	17	18	22	18	26	19	20	19	22	21	20	19	24	21
Education	23	23	19	15	23	20	28	18	13	19	19	21	18	16
Poverty	16	16	23	17	27	12	16	21	19	17	21	18	23	18
Crime / public safety	8	15	33	11	7	11	13	10	13	12	12	12	9	14
Impact of climate change	10	8	10	11	13	8	12	10	9	12	9	12	8	9
Overall quality of the environment	9	12	6	12	13	9	14	10	11	12	11	12	10	11
How corporations in Canada function	6	5	6	5	5	1	7	3	5	5	5	6	4	4
Public transportation	2	3	1	7	5	2	7	5	2	6	3	7	2	1
Water pollution	4	2	2	2	3	3	5	2	2	3	3	3	3	3
Water supply	2	5	2	3	2	2	3	3	2	3	3	3	2	3
Other	3	3	4	3	3	4	3	3	4	3	3	3	3	3

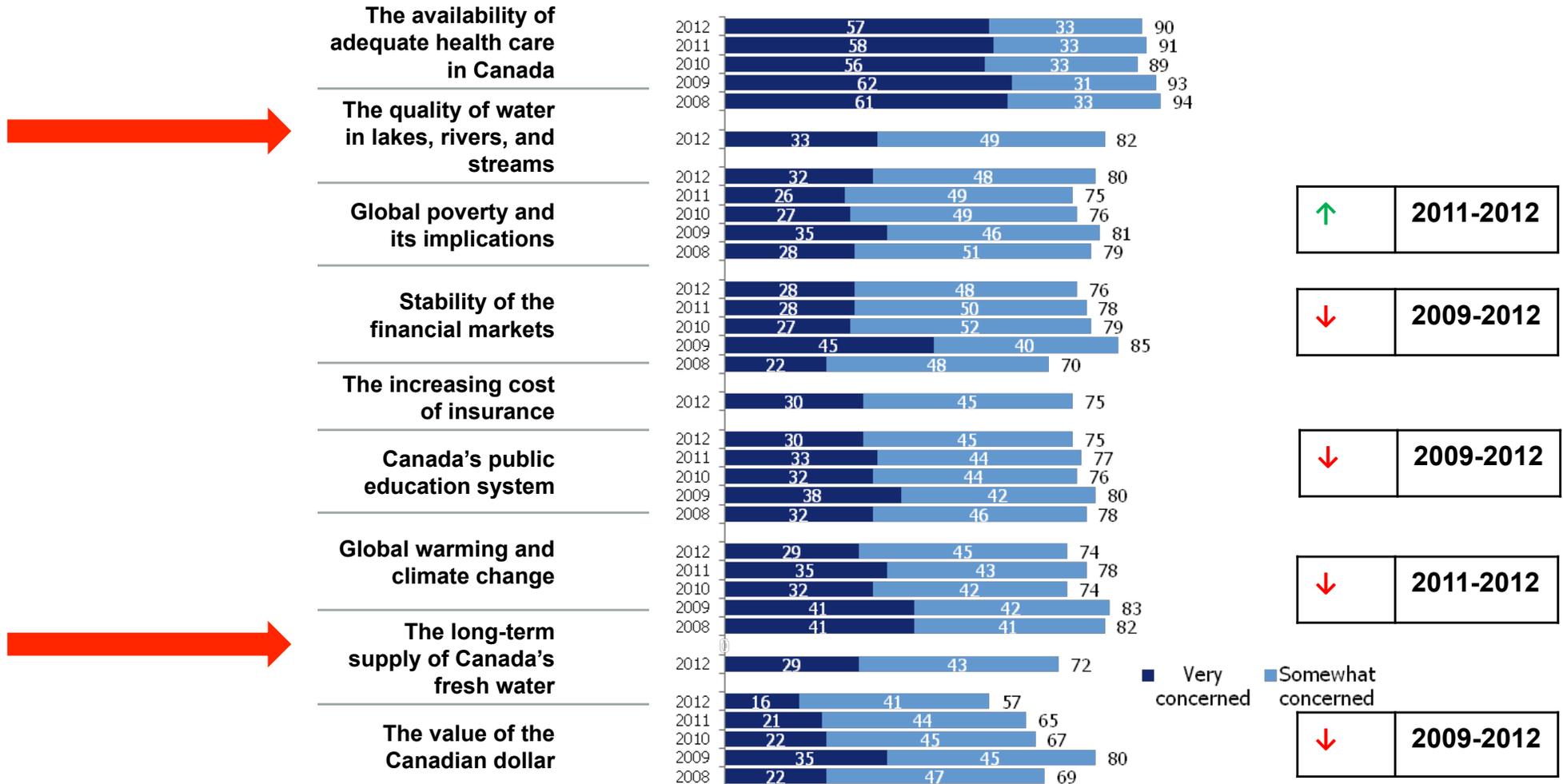
Base: All respondents 2012 *n*=2428

- 9 Q1. What do you think are the three most important issues facing Canada? Please select up to three from the list below, in order of importance.

Canadians show more concern for water quality than water supply

Concern for Issues

“Very Concerned” or “Somewhat Concerned,” 2008–2012



Base: All respondents 2012 n=2428; 2011 n=2066; 2010 n=2022; 2009 n=2165; 2008 n=2309

Concern for Issues

“Very Concerned” and “Somewhat Concerned,” by Demographics, 2012

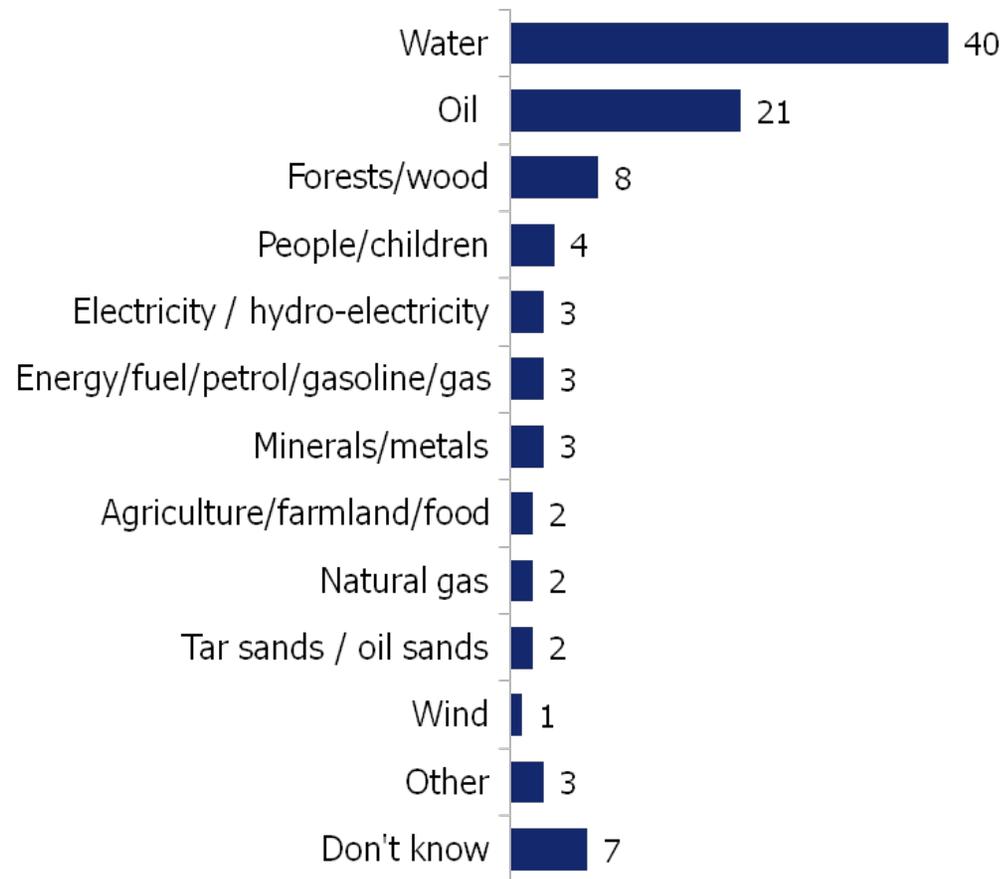
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/ cities	Rural (<1000)
The availability of adequate health care in Canada	86	91	91	90	92	94	83	92	95	85	96	89	93	94
The quality of water in lakes, rivers and streams	75	82	79	84	80	83	74	82	88	76	87	78	86	87
Global poverty and its implications	77	81	79	82	79	77	77	81	81	72	87	80	79	81
Stability of the financial markets	79	79	76	80	65	78	72	75	79	76	75	75	76	76
The increasing cost of insurance	75	76	76	83	61	77	70	76	78	73	77	71	80	83
Canada’s public education system	78	76	73	74	74	77	76	75	73	71	79	75	75	75
Global warming and climate change	73	66	63	75	77	77	76	74	71	68	79	75	73	72
The long-term supply of Canada’s fresh water	67	79	77	77	63	72	67	72	77	65	79	70	74	76
The value of the Canadian dollar	62	59	51	60	46	67	56	59	55	52	62	55	61	59

Base: All respondents 2012 n=2428

Unprompted, water is considered to be Canada's most valuable natural resource

Canada's Most Valuable Natural Resource

Unprompted, 2012



Base: All respondents 2012 *n*=2428

Water is valued and considered most valuable across nearly all regions in Canada. Those in Quebec most strongly value water as a natural resource, while those in Alberta value it second to oil

Canada's Most Valuable Natural Resource

Unprompted, by Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Water	36	18	35	38	57	39
Oil	30	50	24	22	3	19
Forests / wood	16	3	2	9	5	8
Don't know	5	6	8	9	6	7
People / children	4	5	7	3	2	11
Electricity / hydro-electricity	0	0	4	1	10	1
Energy / fuel / petrol / gasoline / gas	1	2	3	2	7	3
Minerals / metals	3	1	7	3	4	1
Agriculture / farmland / food	1	2	4	4	0	1
Natural gas	0	4	1	4	1	0
Tar sands / oil sands	1	2	1	2	1	0
Wind	0	1	1	1	1	6
Coal	0	1	0	0	0	0
Gold	0	1	1	0	0	0
Don't know	5	6	8	9	6	7
Other	2	5	2	3	3	4

Most valuable natural resource	
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Base: All respondents 2012 n=2428

Canada's Most Valuable Natural Resource

By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Water	36	18	35	38	57	39	40	40	41	38	42	39	41	42
Oil	30	50	24	22	3	19	22	19	23	23	20	22	18	22
Forests / wood	16	3	2	9	5	8	9	9	5	8	7	8	9	6
People / children	4	5	7	3	2	11	1	3	8	4	4	3	5	7
Electricity / hydro-electricity	0	0	4	1	10	1	3	3	3	2	4	3	4	2
Energy / fuel / petrol / gasoline / gas	1	2	3	2	7	3	3	5	2	4	3	4	3	2
Minerals / metals	3	1	7	3	4	1	2	4	2	4	2	3	3	2
Agriculture / farmland / food	1	2	4	4	0	1	3	2	2	3	2	2	2	2
Natural gas	0	4	1	4	1	0	2	2	3	1	3	2	2	3
Tar sands / oil sands	1	2	1	2	1	0	1	2	2	2	1	2	2	1
Wind	0	1	1	1	1	6	1	1	2	1	1	1	1	3
Coal	0	1	0	0	0	0	0	0	0	0	0	0	0	0
Gold	0	1	1	0	0	0	0	0	0	0	0	0	1	0
Don't know	5	6	8	9	6	7	9	7	5	4	10	7	8	6
Other	2	5	2	3	3	4	3	3	3	4	2	3	4	2

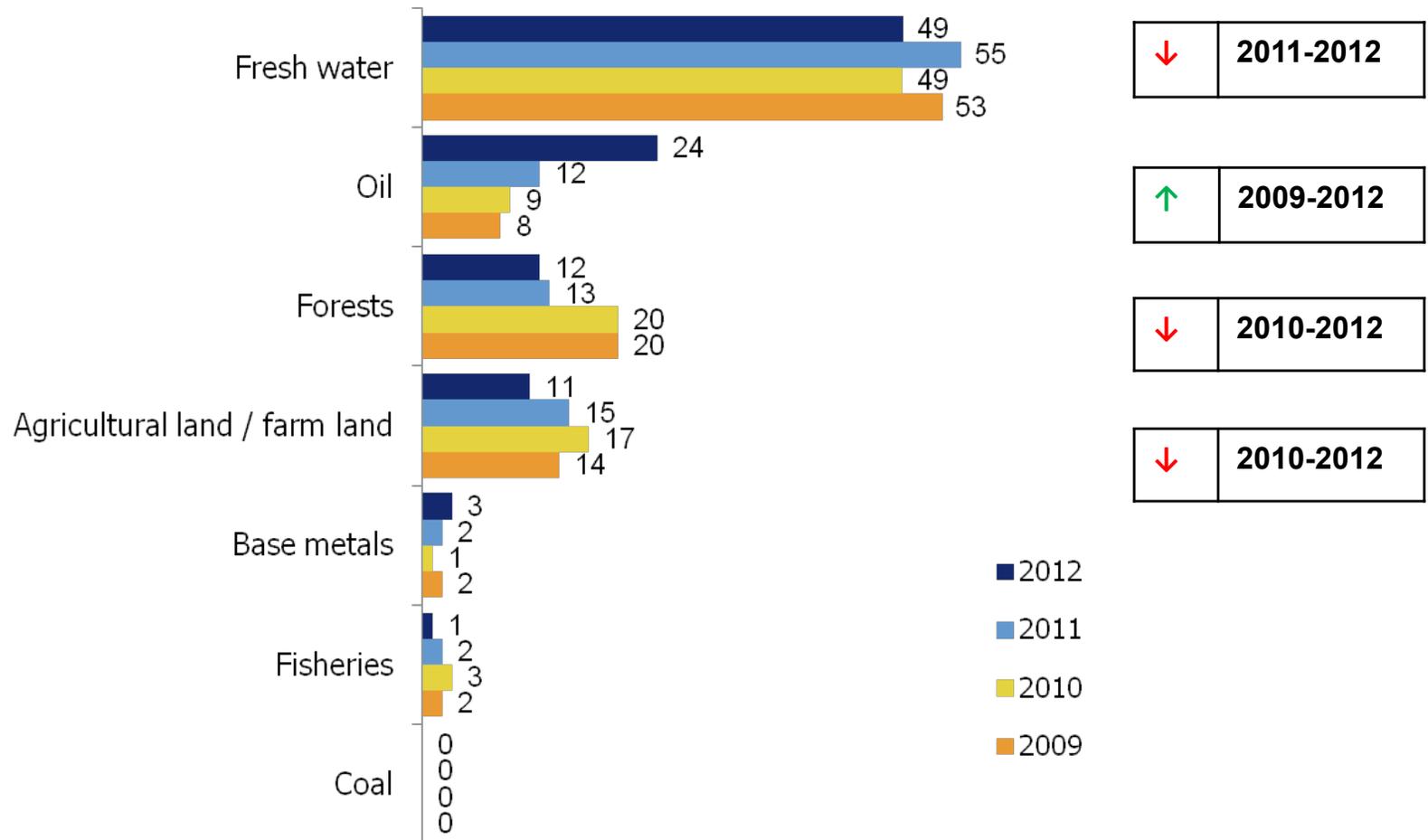
Base: All respondents 2012 *n*=2428

Q3a. Economically, what do you think is Canada's most valuable natural resource?

While fresh water continues to be considered Canada's most important natural resource, in 2012 oil rises to second most valuable resource, above forests and agricultural land

Canada's Most Important Natural Resource

Prompted, 2009–2012



Base: All respondents 2012 *n*=2428; 2011 *n*=2066; 2010 *n*=2022; 2009 *n*=2165

- 15 Q4t. Which of the following do you consider to be Canada's most important natural resource?
Please select only one.

Alberta is the only region in Canada that does not rank fresh water as Canada's most important natural resource

Canada's Most Valuable Important Resource

Prompted, by Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Fresh water	45	29	52	49	58	49
Oil	25	51	24	24	11	17
Forests	18	5	3	11	15	13
Agricultural / farm land	7	12	17	12	10	15
Fisheries	1	1	0	1	1	3
Base metals	3	1	3	3	5	3
Coal	0	1	0	0	0	0

Most valuable natural resource	
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Base: All respondents 2012 $n=2428$;

- 16 Q4t. Which of the following do you consider to be Canada's most important natural resource?
Please select only one.

Canada's Most Important Natural Resource

By Demographics, 2012

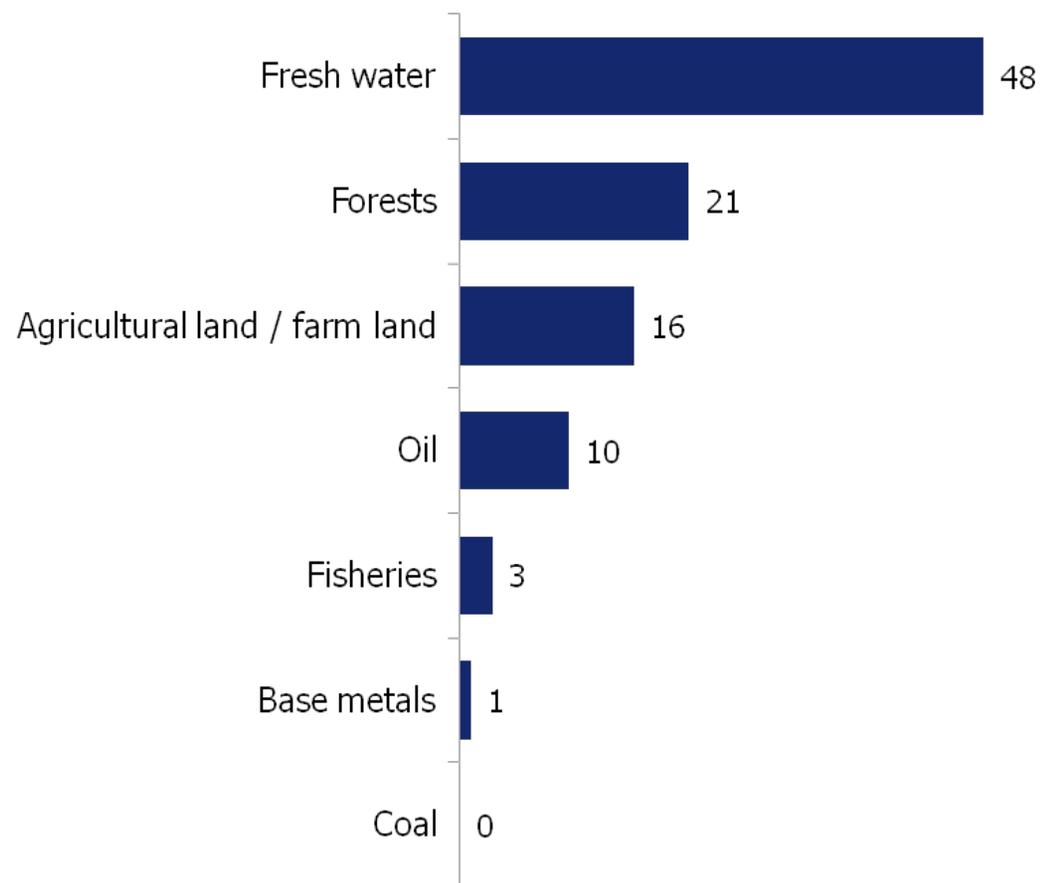
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/ cities	Rural (<1000)
Fresh water	45	29	52	49	58	49	46	48	52	47	50	48	51	50
Oil	25	51	24	24	11	17	24	22	25	27	21	26	19	20
Forests	18	5	3	11	15	13	16	12	8	12	12	13	13	8
Agricultural / farm land	7	12	17	12	10	15	10	12	12	9	14	9	13	18
Fisheries	1	1	0	1	1	3	1	1	1	1	1	1	1	1
Base metals	3	1	3	3	5	3	2	4	2	4	2	3	4	3
Coal	0	1	0	0	0	0	0	1	0	0	0	0	0	0

Base: All respondents 2012 $n=2428$

- 17 Q4t. Which of the following do you consider to be Canada's most important natural resource?
Please select only one.

Fresh water is the natural resource most cared about by Canadians

Natural Resource Most Cared About
2012



Base: All respondents 2012 $n=2428$

Natural Resources Most Cared About

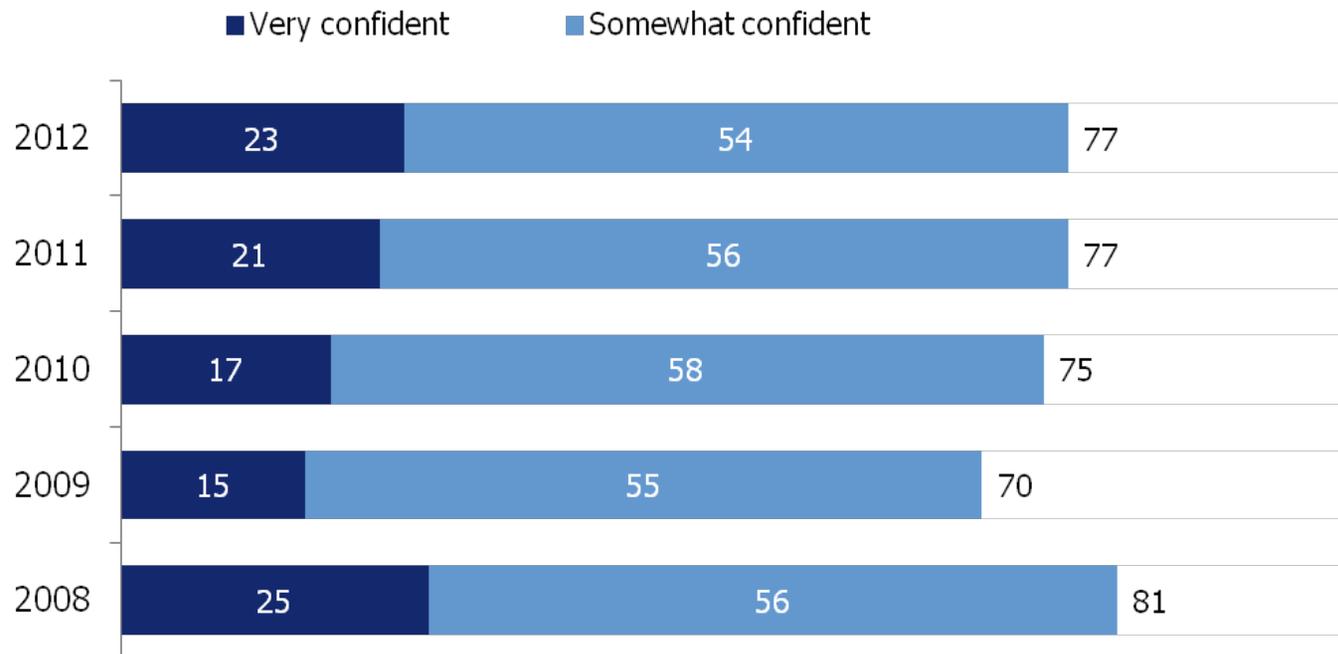
By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Fresh water	51	36	43	49	56	45	47	47	52	49	48	49	52	44
Forests	23	22	15	20	24	18	25	22	15	20	22	22	19	21
Agricultural / farm land	10	18	25	19	12	19	12	16	21	13	20	13	18	26
Oil	11	20	14	9	5	6	11	9	9	13	7	12	6	5
Fisheries	4	2	1	2	2	11	3	3	2	4	2	2	4	2
Base metals	1	1	2	1	1	1	2	2	0	1	1	1	1	1
Coal	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Base: All respondents 2012 $n=2428$

Canadians continue to be confident that Canada has enough fresh water to meet long-term needs

Level of Confidence that Canada has Enough Fresh Water to Meet Long-Term Needs
“Very Confident” or “Somewhat Confident,” 2008–2012



Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$; 2009 $n=2165$; 2008 $n=2309$

Level of Confidence that Canada Has Enough Fresh Water to Meet Long-Term Needs

“Very confident” and “Somewhat confident,” by Demographics, 2012

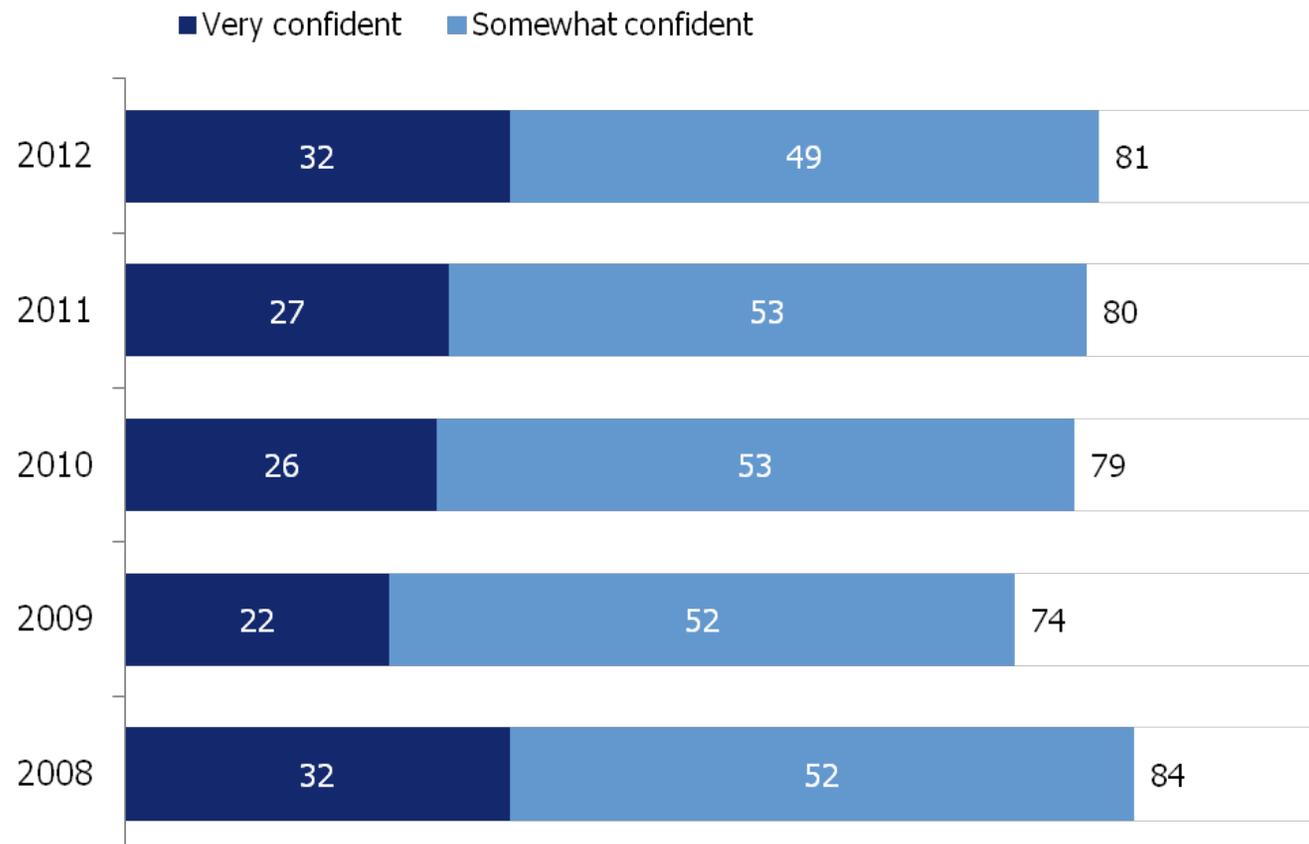
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Very confident	25	22	24	24	17	27	22	23	24	31	15	25	19	21
Somewhat confident	59	57	59	57	45	49	52	55	54	52	56	54	55	53

Base: All respondents 2012 *n*=2428;

Canadians continue to be confident that their regions have enough fresh water to meet long-term needs

Level of Confidence that Your Region of Canada Enough Fresh Water to Meet Long-Term Needs

“Very Confident” or “Somewhat Confident,” 2008–2012



Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$; 2009 $n=2165$; 2008 $n=2309$

Canadians living in Quebec are less confident than those living in other regions that there is enough water in their region to meet long-term needs

Level of Confidence that Your Region of Canada Enough Fresh Water to Meet Long-Term Needs

“Very confident” and “Somewhat confident,” by Demographics, 2012

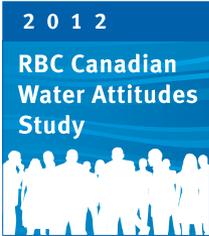
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Very confident	40	22	39	33	26	34	31	30	34	39	25	30	31	36
Somewhat confident	47	55	48	50	48	48	46	51	51	46	52	50	50	47

Base: All respondents 2012 *n*=2428

- 23 Q7t. And focusing specifically on your region of Canada, how confident are you that your region has enough freshwater to meet its long-term needs?



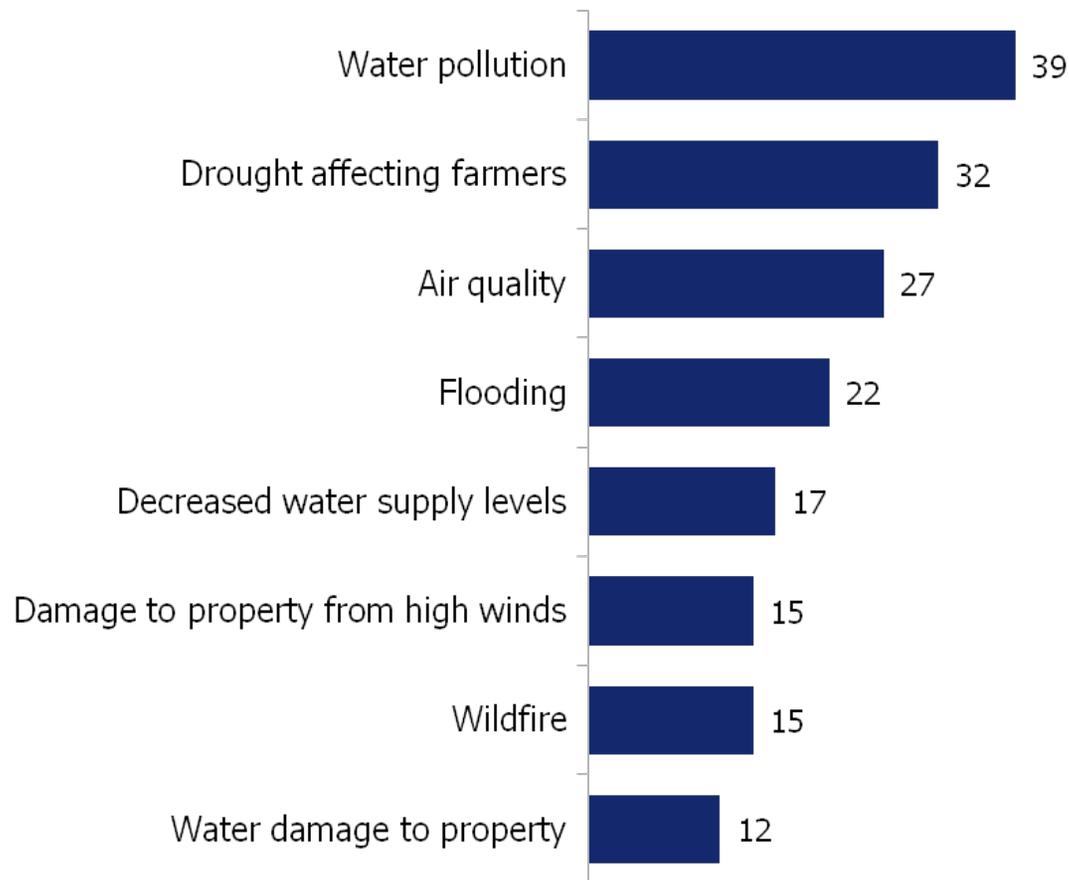
Issues Related to Extreme Weather



When thinking about increasing frequency and severity of extreme weather events, Canadians are most concerned about water pollution, drought, and air quality

Concern about Extreme Weather Events

Total Mentions, 2012



Base: All respondents 2012 $n=2428$

Canadians in Alberta and the Prairies are most concerned about droughts resulting from extreme weather, while Canadians in other regions are more concerned about water pollution

Concern about Extreme Weather Events

Total Mentions, by Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Water pollution	42	24	31	38	49	34
Drought affecting farmers	29	35	38	37	23	29
Air quality	25	24	14	29	36	14
Flooding	15	17	48	19	24	22
Decreased water supply levels	19	18	11	16	18	16
Damage to property from high winds	15	23	12	15	8	33
Wildfire	26	27	9	11	15	11
Water damage to property	8	8	18	12	11	22

Issue of most concern	
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Base: All respondents 2012 $n=2428$

Concern about Extreme Weather Events

Total Mentions, by Demographics, 2012

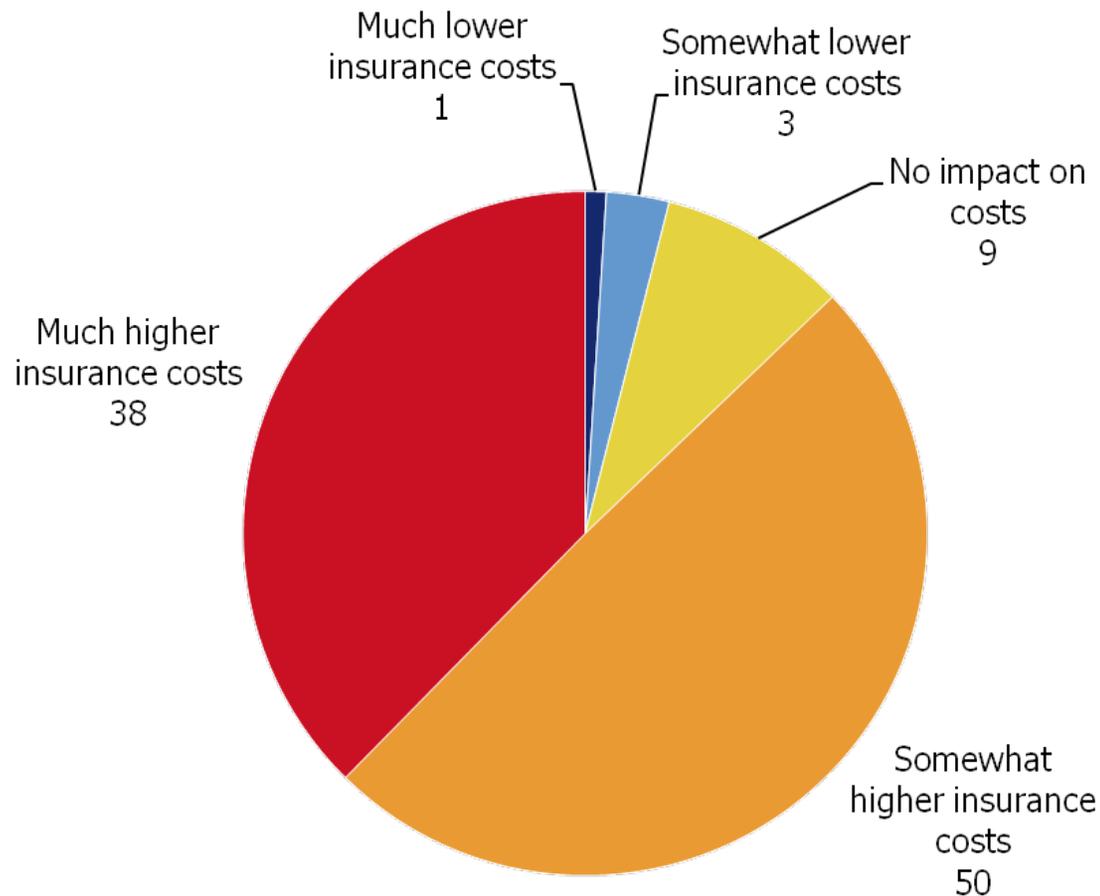
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Water pollution	42	24	31	38	49	34	48	36	34	41	37	43	37	29
Drought affecting farmers	29	35	38	37	23	29	22	31	42	26	37	29	34	40
Air quality	25	24	14	29	36	14	34	30	18	30	25	31	23	20
Flooding	15	17	48	19	24	22	21	22	21	21	22	21	13	22
Decreased water supply levels	19	18	11	16	18	16	17	15	19	16	18	17	19	15
Damage to property from high winds	15	23	12	15	8	33	14	15	18	16	15	12	18	22
Wildfire	26	27	9	11	15	11	15	14	17	14	17	14	16	18
Water damage to property	8	8	18	12	11	22	11	14	11	14	10	12	11	13

Base: All respondents 2012 *n*=2428

A large majority of Canadians believes extreme weather patterns will result in higher insurance costs

Impact of Extreme Weather Events on the Cost of Insurance

2012

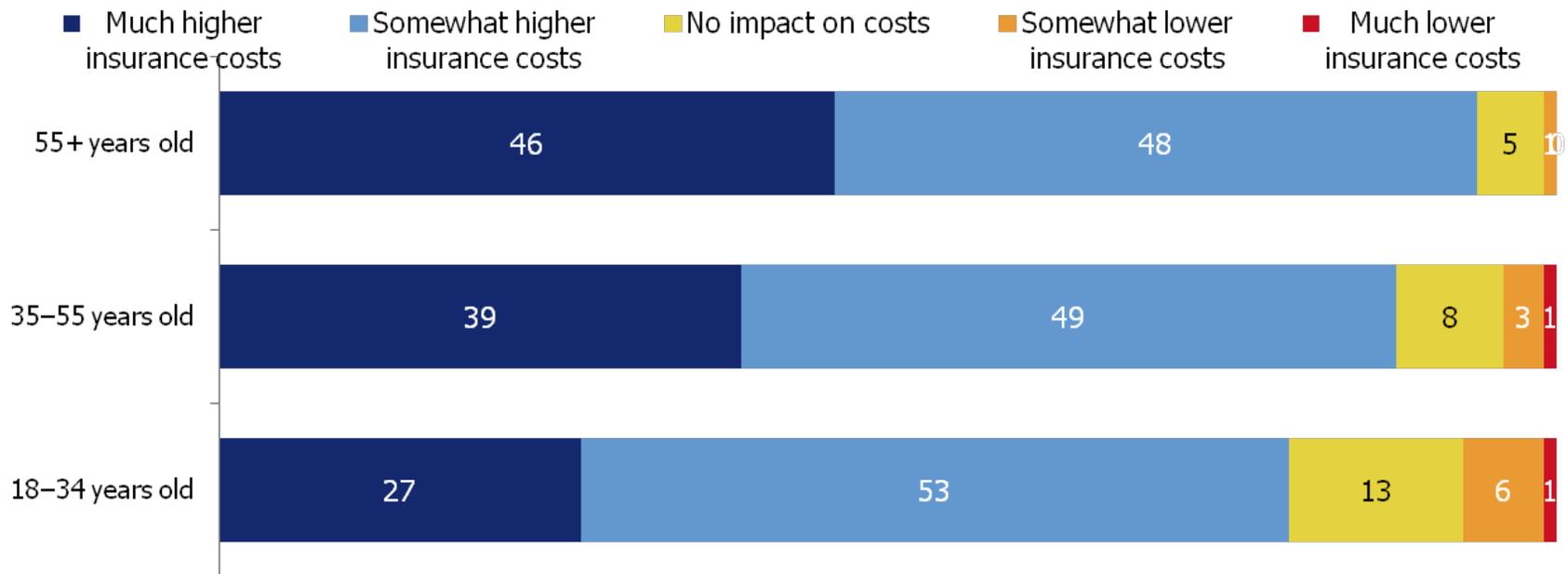


Base: All respondents 2012 $n=2428$

Older Canadians are more aware of the impact extreme weather events have on the cost of insurance

Impact of Extreme Weather Events on the Cost of Insurance

By Age, 2012



Base: All respondents 2012 *n*=2428

Impact of Extreme Weather Events on the Cost of Insurance

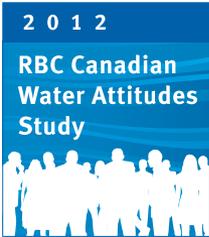
By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Much higher insurance costs	30	38	39	34	50	30	27	39	46	35	40	35	43	42
Somewhat higher insurance costs	57	49	52	50	40	64	53	50	47	49	50	49	49	51
No impact on costs	9	9	5	11	6	5	13	8	5	11	7	11	6	5
Somewhat lower insurance costs	3	3	2	4	3	1	6	3	1	4	2	4	2	1
Much lower insurance costs	1	1	2	0	1	0	1	1	0	1	0	1	1	0

Base: All respondents 2012 *n*=2428



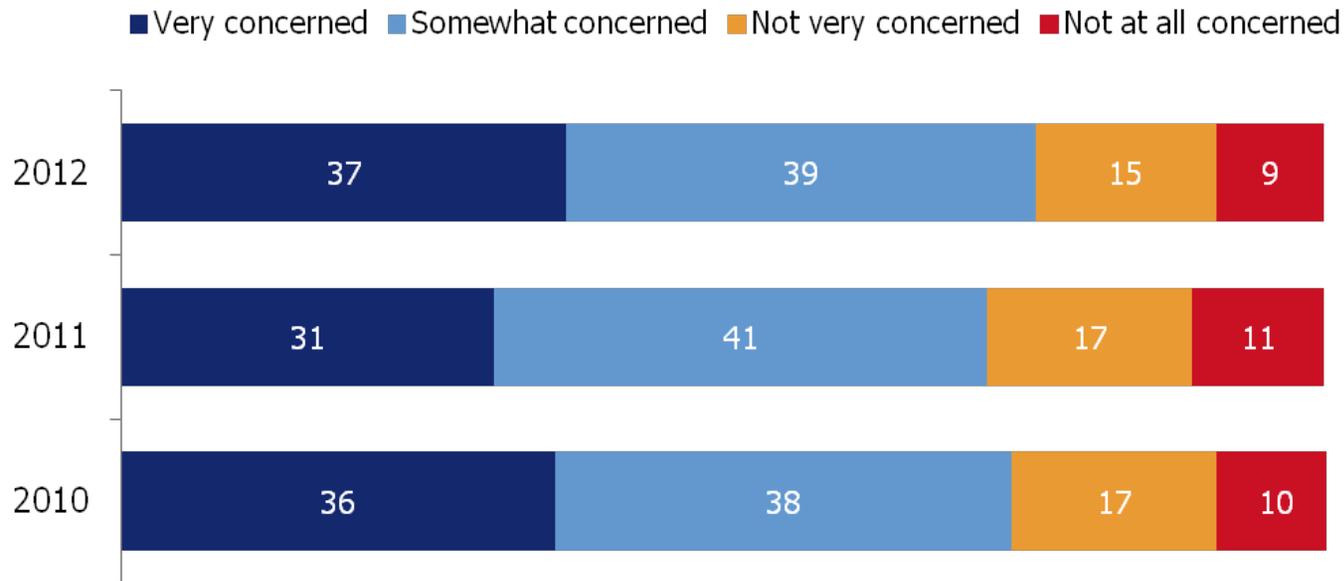
Water Issues and First Nations



In 2012, Canadians are slightly more concerned about water conditions on reserves

Concern about Water Conditions on First Nations Reserves

2010–2012



↑ 2011-2012

Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$

Q11. In Canada, more than 100 aboriginal 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 aboriginal reserves?

Concern about Water Conditions on First Nations Reserves

By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Very concerned	35	36	26	43	34	34	28	37	46	32	42	37	38	37
Somewhat concerned	37	34	42	39	38	47	42	37	38	39	38	40	37	37
Not very concerned	17	21	17	11	19	9	19	17	9	17	13	15	16	15
Not at all concerned	11	9	14	7	9	10	11	9	7	12	6	8	9	10

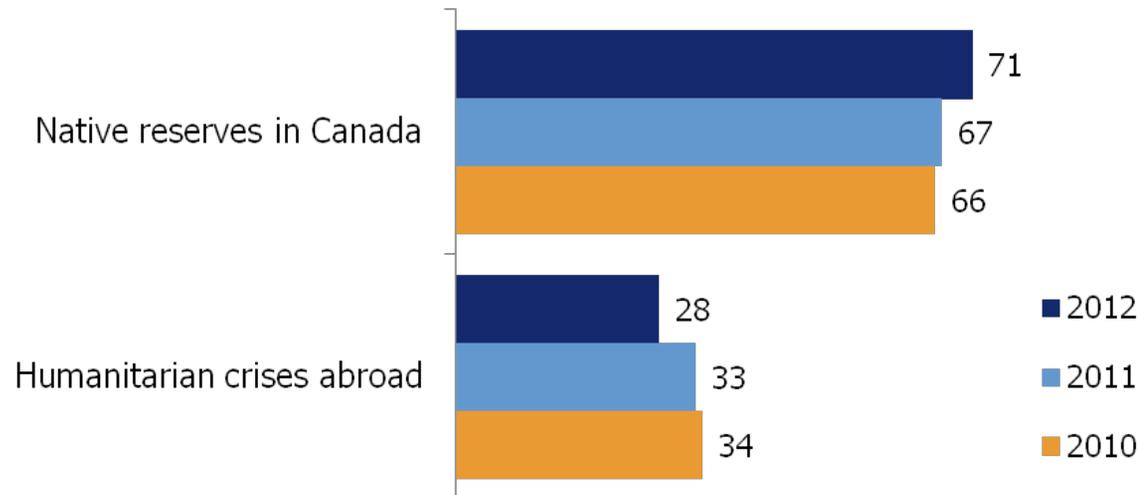
Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$

Q11. In Canada, more than 100 aboriginal 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 aboriginal reserves?

When given the choice, Canadians indicate more motivation to support organizations addressing the issue of safe drinking water on reserves, rather than humanitarian crises abroad

Preferred Focus of Support for Safe Drinking Water Programs

2012–2012



↑ 2010-2012

↓ 2010-2012

Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$;

Q12t. Would you be more motivated to support an organization that helps to address the issue of safe drinking water on aboriginal reserves in Canada or an organization that addresses the issue of safe drinking water during humanitarian crises abroad, such as floods and earthquakes?

Preferred Focus of Support for Safe Drinking Water Programs

By Demographics, 2012

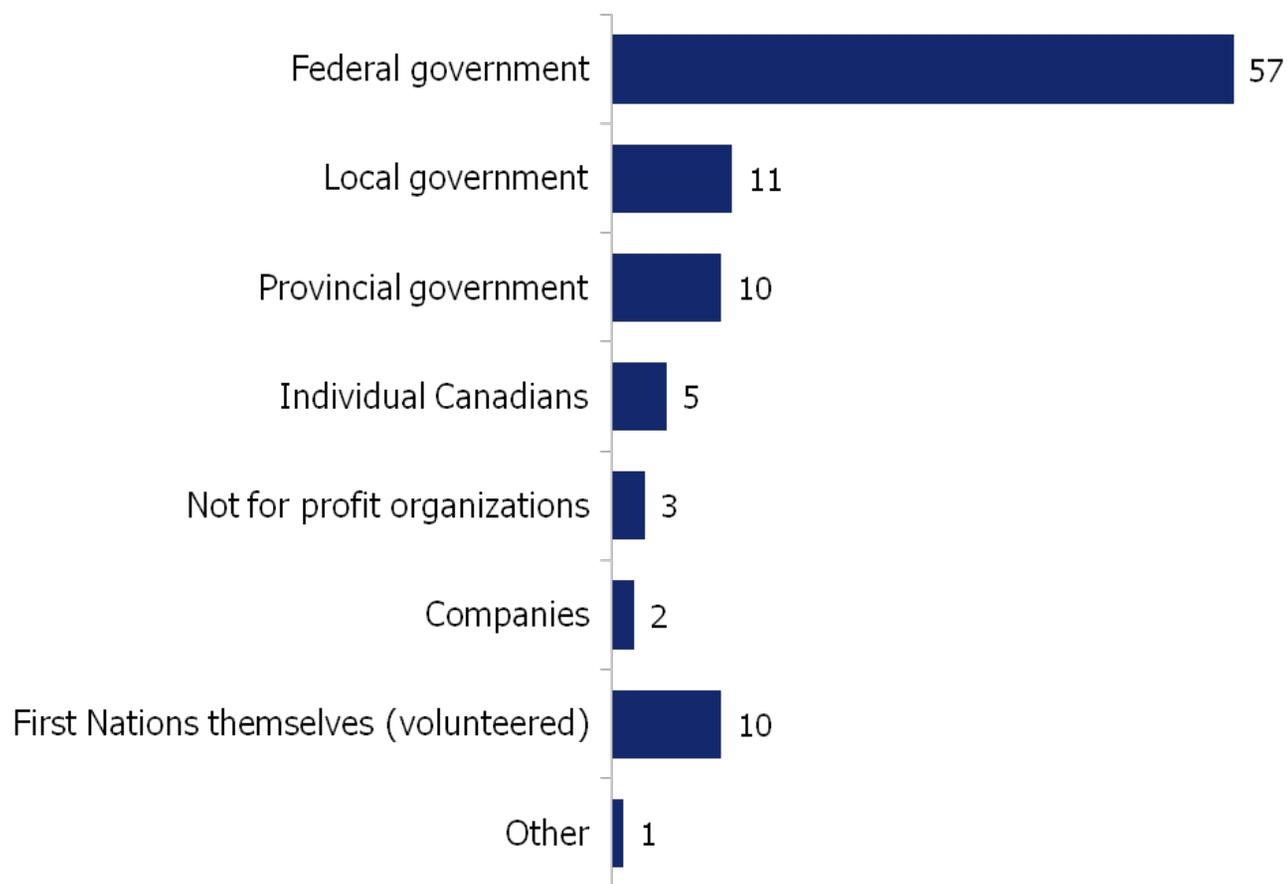
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Native reserves in Canada	65	62	63	78	70	70	56	71	84	69	73	67	75	79
Humanitarian crises	35	36	35	21	30	30	43	28	14	30	26	33	24	19

Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$;

35 Q12t. Would you be more motivated to support an organization that helps to address the issue of safe drinking water on aboriginal reserves in Canada or an organization that addresses the issue of safe drinking water?

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 2012



Base: All respondents 2012 $n=2428$

Q13. Who should be held most responsible for working to improve the quality of water on aboriginal reserves in Canada?

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

By Demographics, 2012

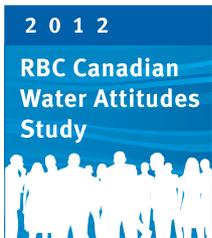
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Federal government	60	46	51	63	51	59	53	56	61	58	56	58	52	56
Local government	8	12	10	10	15	12	12	11	10	13	9	11	11	11
Provincial government	7	12	9	12	8	8	15	9	7	9	12	11	13	5
First Nations communities	16	14	23	7	3	10	6	11	10	9	9	7	11	13
Individual Canadians	1	2	2	1	14	4	6	5	3	4	5	4	5	4
Not for profit organizations	4	5	1	3	3	3	4	3	2	3	3	3	3	2
Companies	1	2	0	2	4	1	3	2	2	2	2	2	2	2
First Nations chiefs / councils	3	5	2	1	0	1	0	2	2	1	2	1	1	3
Other	0	1	0	1	2	0	1	1	2	0	2	1	1	3

Base: All respondents 2012 *n*=2428

Q13. Who should be held most responsible for working to improve the quality of water on aboriginal reserves in Canada?



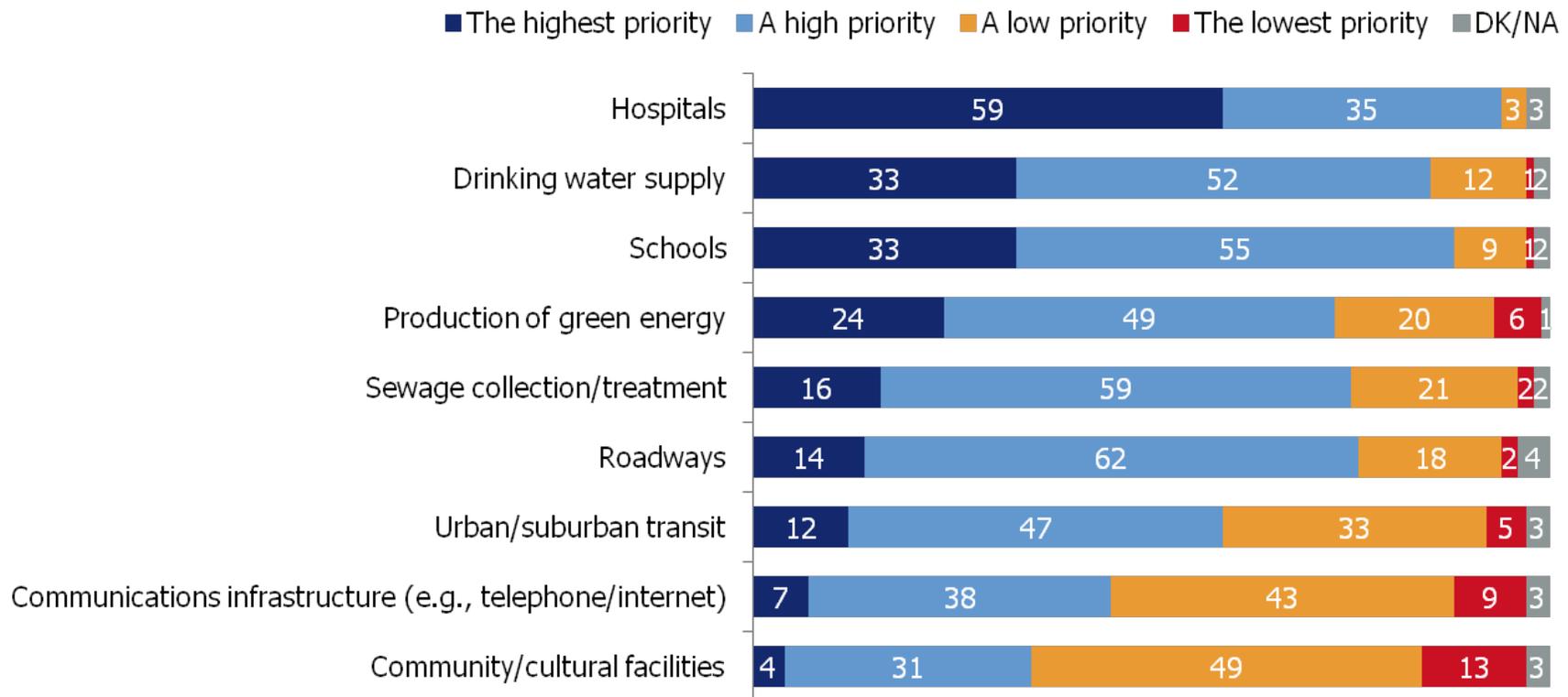
Infrastructure



Drinking water supply is considered a high-priority area for government funding

Priority Infrastructure Areas for Government Funding

2012



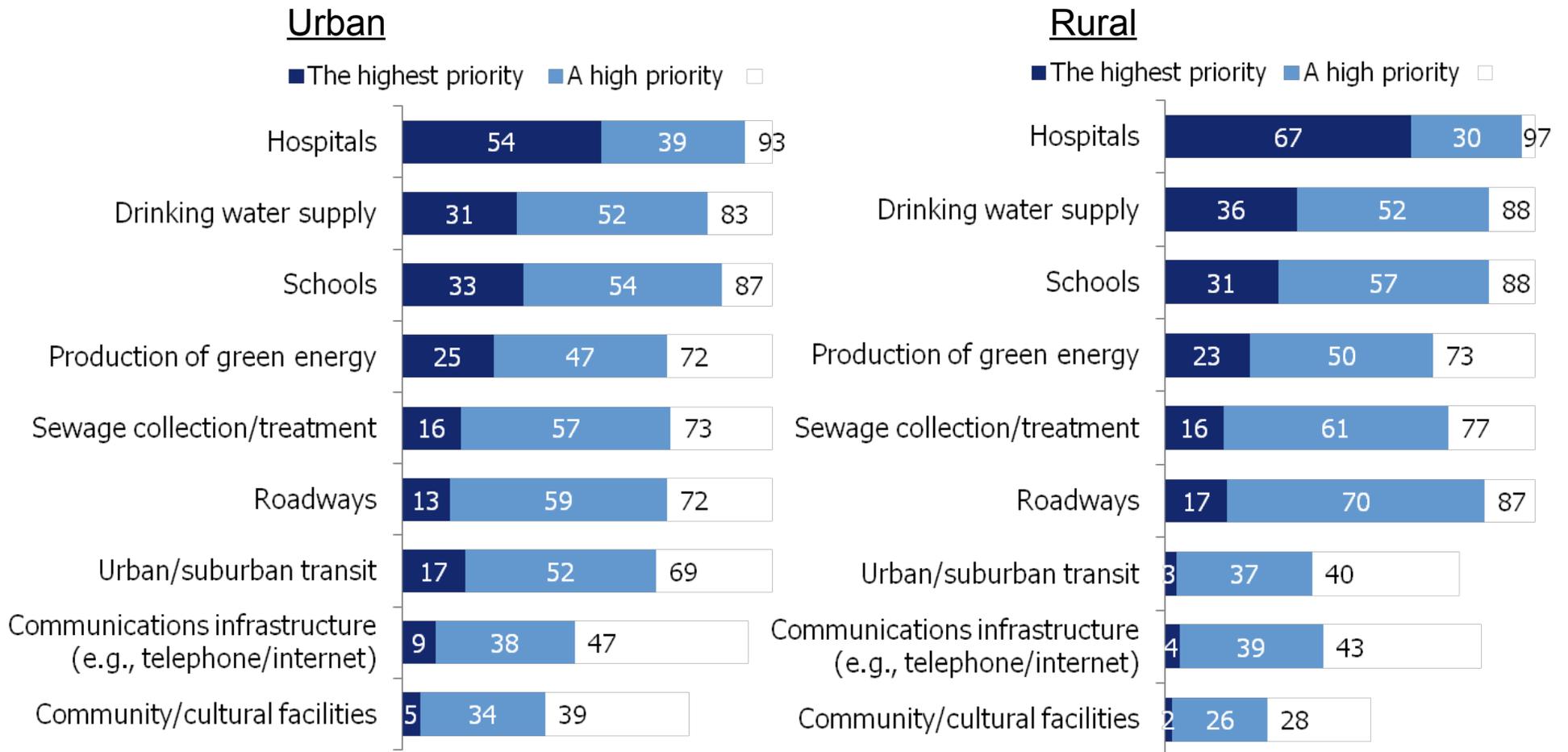
Base: All respondents 2012 *n*=2428

39 Q3.1. 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 area should be a priority for government funding in Canada?

For rural Canadians, roadways and schools are considered a similar priority area for government funding to water supply

Priority Infrastructure Areas for Government Funding

Urban vs Rural, 2012



Base: All respondents 2012 *n*=2428

Priority Infrastructure Areas for Government Funding

“The Highest Priority” and “A High Priority,” by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural
Hospitals	92	95	93	94	96	93	92	94	96	92	97	93	95	96
Drinking water supply	84	88	88	88	77	87	80	84	90	82	88	83	88	88
Schools	89	89	87	87	84	90	87	88	86	84	90	87	87	88
Production of green energy	84	73	66	71	70	79	76	71	72	72	74	72	74	73
Sewage collection and treatment	68	75	76	78	72	84	68	74	83	72	78	73	79	77
Roadways	68	73	85	75	81	84	69	77	84	73	80	72	79	86
Urban and suburban transit	61	62	41	63	60	49	65	57	57	59	60	70	48	40
Communications infrastructure such as telephone and internet	49	44	49	46	41	46	46	43	47	46	44	47	41	43
Community and cultural facilities	35	37	31	35	34	37	43	32	32	33	37	39	30	28

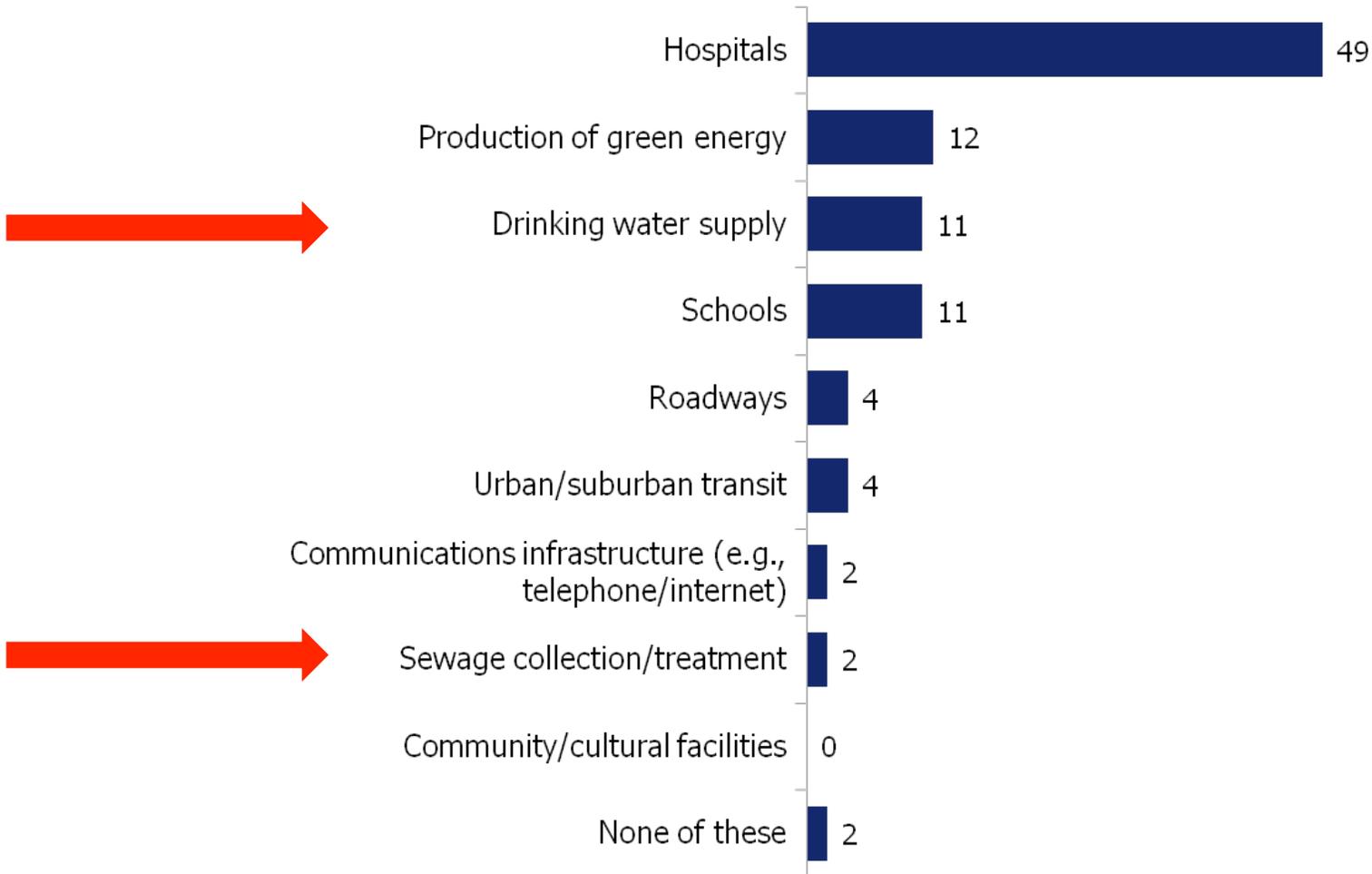
Base: All respondents 2012 *n*=2428

- 41 Q3.1. 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 area should be a priority for government funding in Canada?

Water supply among the second tier priorities for government funding, sewage collection/treatment seen as a lower priority

Highest Priority Infrastructure Area for Government Funding

2012

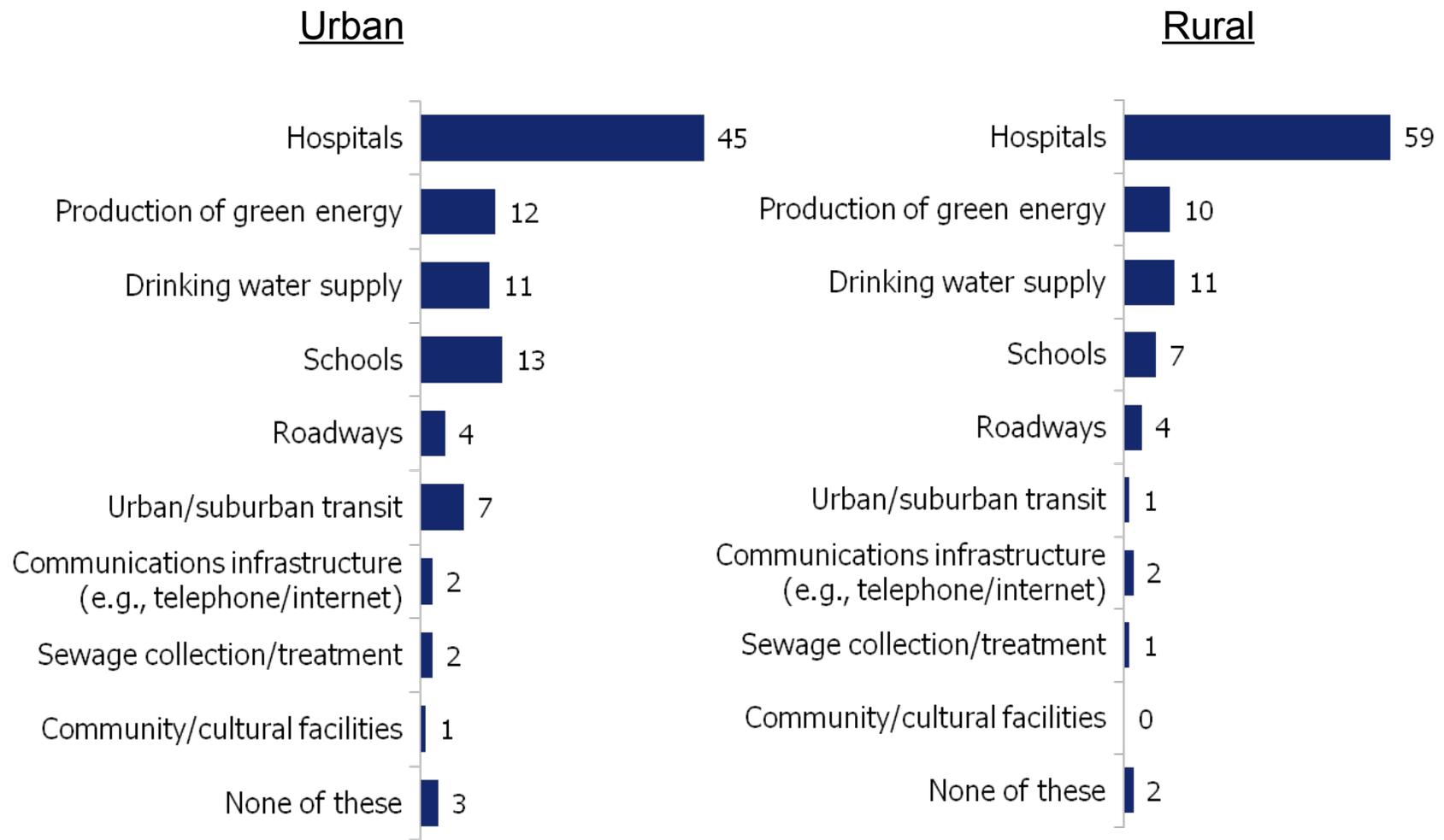


Base: All respondents 2012 *n*=2428

Urban and rural Canadians have similar priorities when it comes to government funding on infrastructure

Highest Priority Infrastructure Area for Government Funding

Urban vs Rural, 2012



Base: All respondents 2012 $n=2428$

While hospitals are a high priority for Canadians across all regions, those in the Prairies and Ontario put more emphasis on water supply than those in other regions

Highest Priority Infrastructure Area for Government Funding

By Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Hospitals	37	47	50	45	61	58
Production of green energy	15	10	7	12	11	14
Drinking water supply	11	11	13	15	5	12
Schools	21	13	11	8	10	10
Roadways	2	3	9	4	6	0
Urban and suburban transit	5	4	2	6	3	1
Communications infrastructure such as telephone and internet	3	1	1	2	1	1
Sewage collection and treatment	0	2	2	3	2	0
Community and cultural facilities	1	0	0	0	1	0
Other	4	3	3	2	1	1
None of these	2	4	2	3	1	2

Highest priority infrastructure area	
Second highest priority infrastructure area	

Base: All respondents 2012 $n=2428$

Highest Priority Infrastructure Area for Government Funding

“The Highest Priority,” by Demographics, 2012

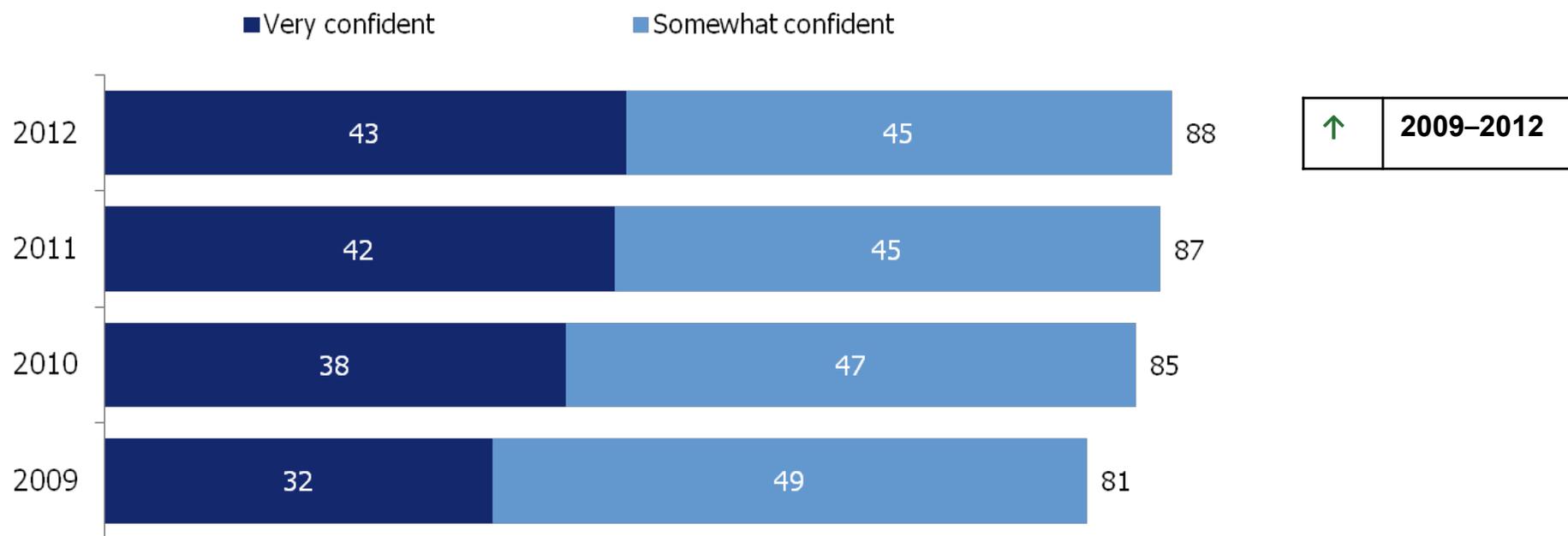
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 1000)
Hospitals	37	47	50	45	61	58	44	48	56	44	54	45	53	59
Production of green energy	15	10	7	12	11	14	13	12	8	13	10	12	14	10
Drinking water supply	11	11	13	15	5	12	9	10	15	10	11	11	11	11
Schools	21	13	11	8	10	10	15	13	5	12	10	13	10	7
Roadways	2	3	9	4	6	0	4	4	4	5	3	4	4	4
Urban and suburban transit	5	4	2	6	3	1	6	5	3	6	3	7	1	1
Communications infrastructure such as telephone and internet	3	1	1	2	1	1	2	2	1	2	1	2	1	2
Sewage collection and treatment	0	2	2	3	2	0	2	1	3	2	2	2	2	1
Community and cultural facilities	1	0	0	0	1	0	0	1	0	1	0	1	0	0
Other	4	3	3	2	1	1	1	2	3	2	2	2	3	3
None of these	2	4	2	3	1	2	3	3	1	3	2	3	2	2

Base: All respondents 2012 *n*=2428

45 Q3.2. Which one, if any, of these same infrastructure areas should be the highest priority for government funding in Canada? *Please select one.*

Confidence about water safety and quality has increased since 2009

Confidence about Water Safety and Quality in the Home 2009–2012



Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$; 2009 $n=2165$

Confidence about Water Safety and Quality in the Home

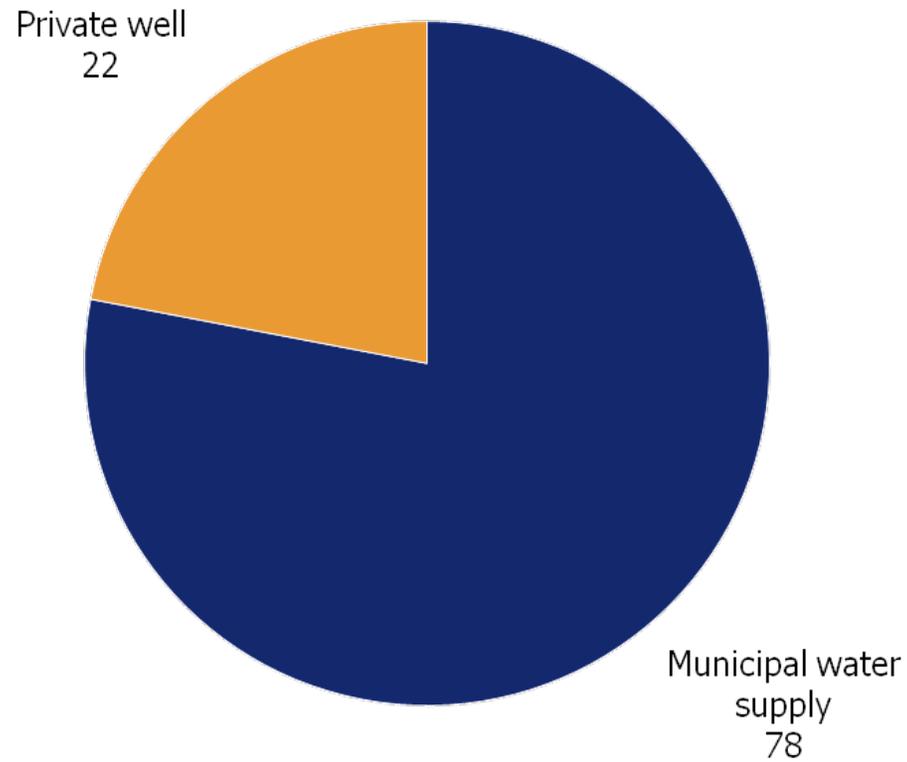
By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Very confident	49	50	59	46	27	45	39	39	53	45	41	41	42	51
Somewhat confident	42	43	35	45	49	46	49	47	39	45	44	48	45	37

Base: All respondents 2012

Main Source of Household Water

2012



Base: All respondents 2012 $n=2428$

Main Source of Household Water

By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Municipal water supply	84	88	81	74	85	41	91	76	67	84	72	95	67	37
Private well	16	12	19	26	15	59	9	24	33	16	28	5	33	63

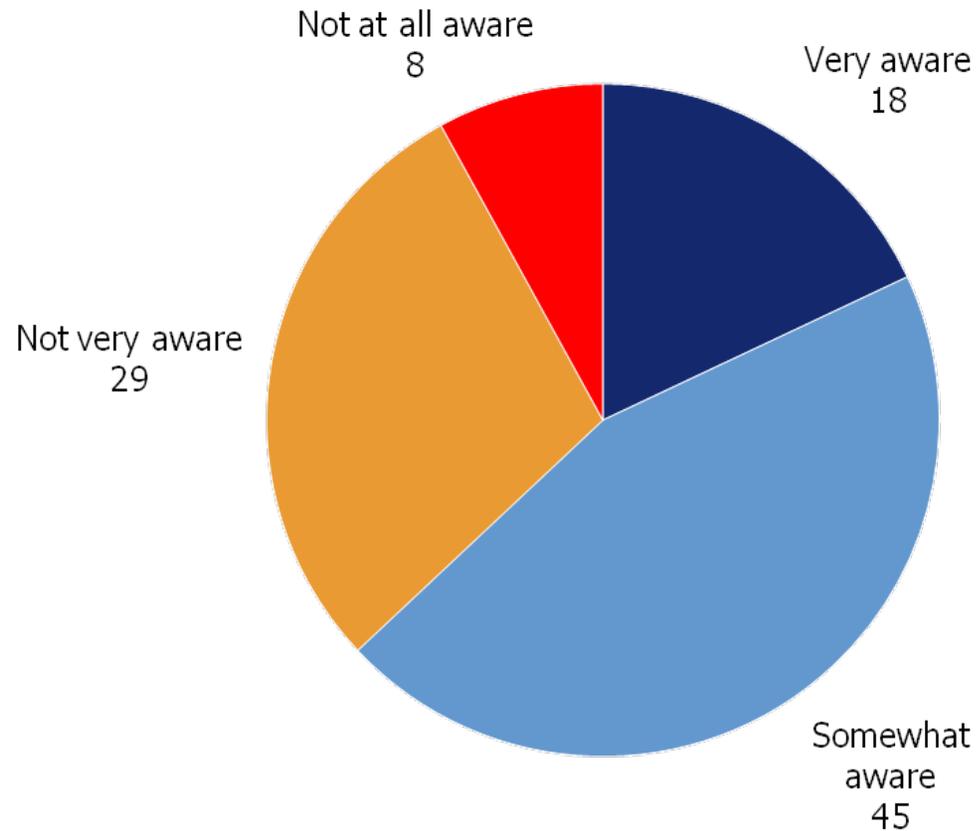
Base: All respondents 2012 *n*=2428

Q15. What is your main source of household water?

Less than one-quarter of Canadians who use municipal water are very aware of the condition of the water and sewage infrastructure servicing their homes

Awareness of Condition of Household Water Systems

2012



Base: Those who use municipal water supply 2012 $n=1827$

Awareness of Condition of Household Water Systems

By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Very aware	20	21	23	19	12	21	7	18	32	18	18	12	27	44
Somewhat aware	50	46	56	47	36	47	43	48	44	47	43	46	47	37
Not very aware	26	27	14	28	38	29	39	25	22	28	31	33	21	16
Not at all aware	5	6	7	6	14	4	11	9	2	7	9	9	5	4

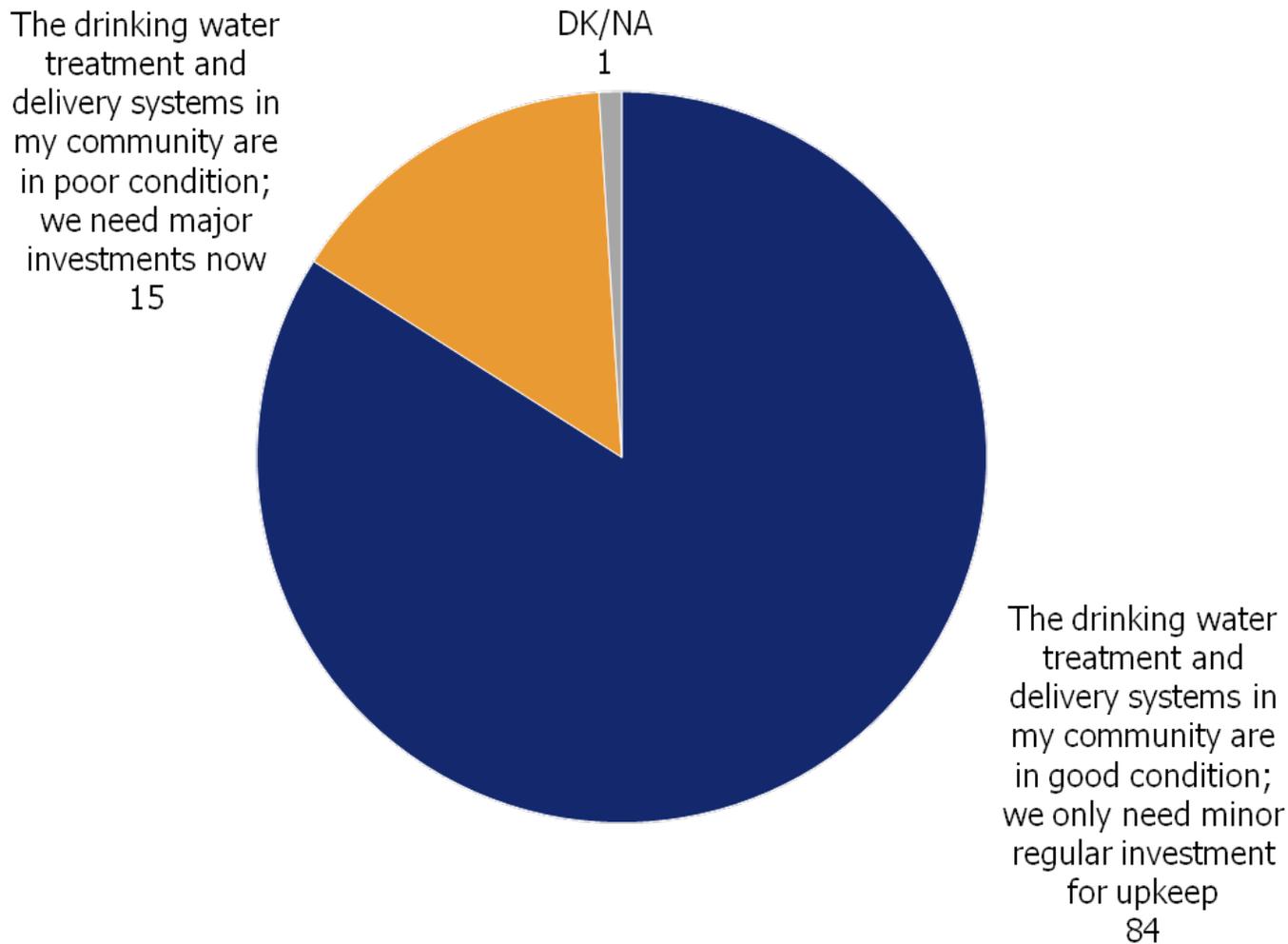
Base: Those who use municipal water supply 2012 *n*=1827

Q17. How aware would you say you are of the condition of water supply and sewage systems servicing your home?

Canadians who use municipal water do not see a need for immediate investment in water infrastructure

Need for Investment in Community Water Systems

2012



Base: Those who use municipal water supply 2012 $n=1827$

Q18. Which one of the following is closest to your own opinion?

Need for Investment in Community Water Systems

By Demographics, 2012

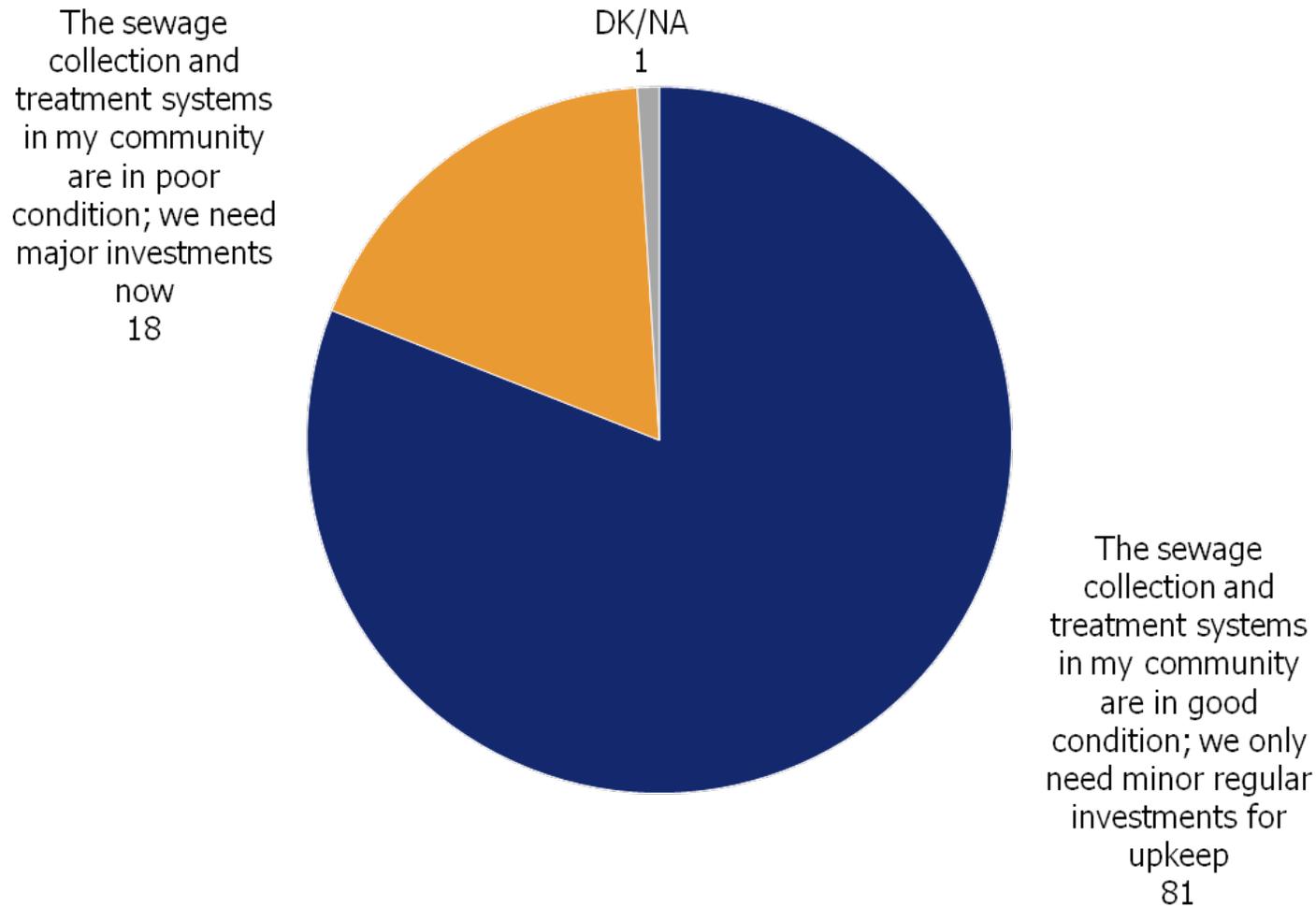
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
The drinking water treatment and delivery systems in my community is in good condition; we only need minor regular investment	90	93	85	86	74	85	87	83	84	86	82	84	86	85
The drinking water treatment and delivery systems in my community is in poor condition; we need major investments now	9	6	14	13	25	14	13	16	15	13	17	15	13	15
Don't know / N/A	1	1	0	1	1	1	1	1	1	1	1	1	1	0

Base: Those who use municipal water supply 2012 *n*=1827

Canadians who use municipal water do not see a need for immediate investment in sewage infrastructure

Need for Investment in Sewage Systems

2012



Base: Those who use municipal water supply 2012 $n=1827$

Need for Investment in Community Sewage System

By Demographics, 2012

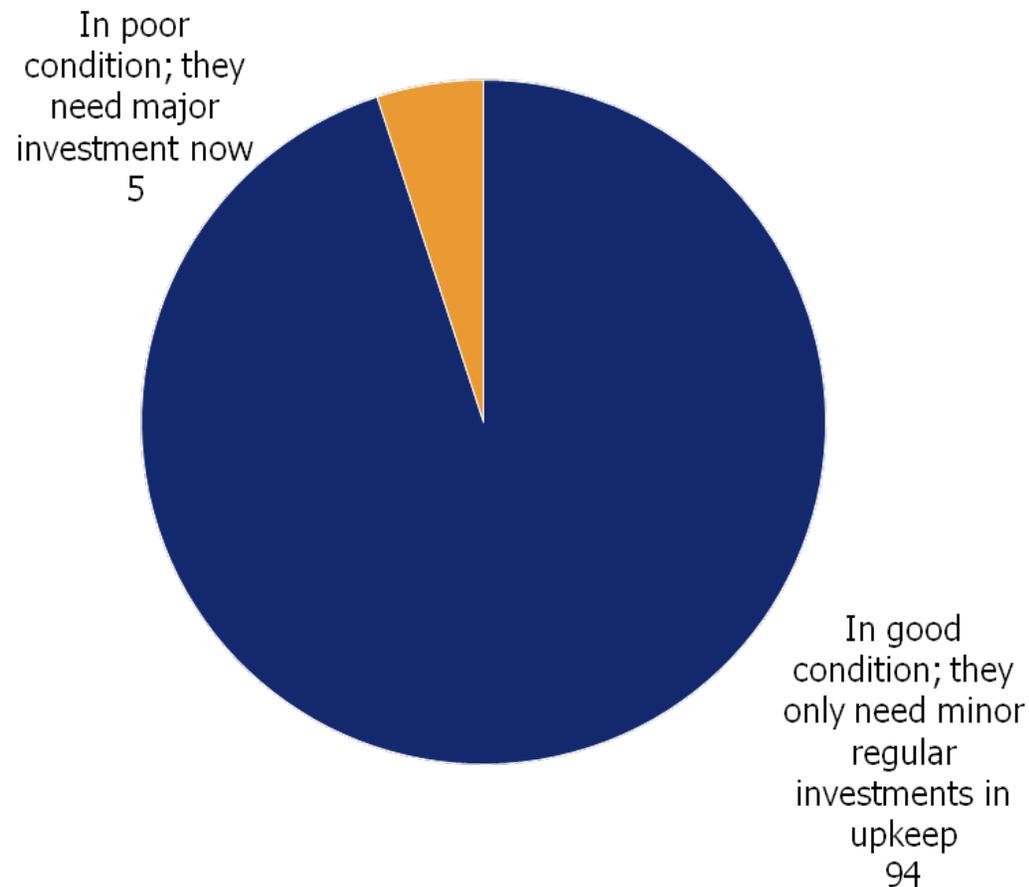
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
The sewage collection and treatment systems in my community are in good condition; we only need minor regular investment	85	92	83	81	72	87	86	80	76	82	80	81	81	77
The sewage collection and treatment systems in my community are in poor condition; we need major investments now	14	8	16	18	27	13	14	19	22	18	19	18	17	21
Don't know / N/A	1	1	1	1	1	0	0	1	2	1	1	1	1	2

Base: Those who use municipal water supply 2012 *n*=1827

Those who use private wells as a source for water do not see a need for immediate investment in infrastructure

Condition of Household Water Systems

2012



Base: Those who use a private well 2012 $n=601$

Condition of Household Water Systems

By Demographics, 2012

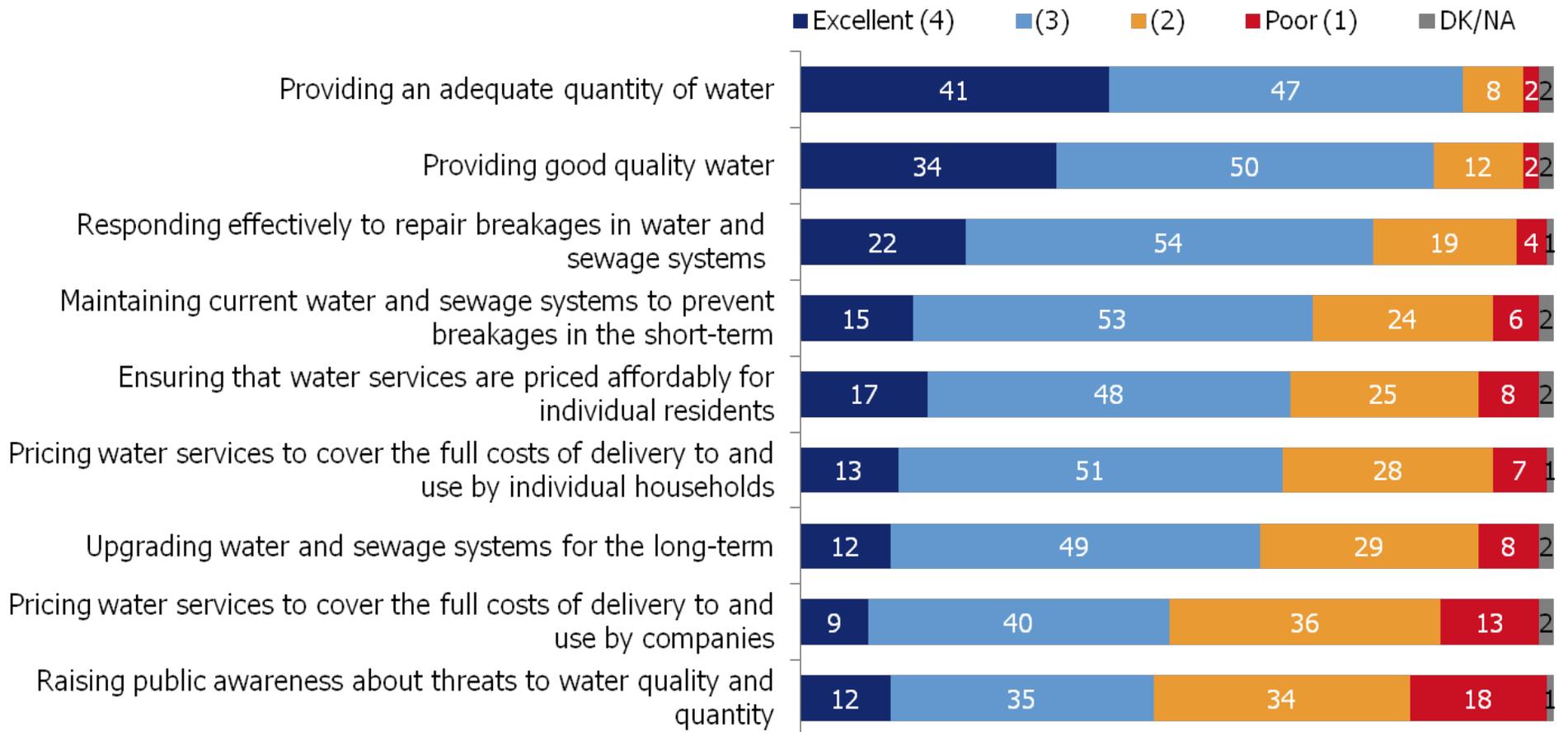
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
In good condition; they only need minor regular investments in upkeep	99	77	100	96	89	96	87	95	96	94	95	92	94	95
In poor condition; they need major investment now	1	22	0	3	11	4	13	5	3	5	5	8	6	4

Base: Those who use a private well 2012 $n=601$

Q16. As far as you know, the water systems for your household water on the property where you live are...

Performance Ratings of Local Municipality

2012



Base: Those who use municipal water supply 2012 *n*=1827

Performance Ratings of Local Municipality

“Excellent”, by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Providing an adequate quantity of water	40	44	50	39	41	38	40	40	44	42	40	41	46	35
Providing good quality water	44	41	41	31	30	25	34	32	38	36	32	34	35	36
Responding effectively to repair breakages in water and sewage systems	29	28	29	20	18	16	22	19	27	24	20	20	27	26
Maintaining current water and sewage systems to prevent breakages in the short-term	18	19	18	14	14	13	16	14	16	17	14	14	19	19
Ensuring that water services are priced affordably for individual residents	21	15	19	11	26	17	20	17	15	17	18	17	19	18
Pricing water services to cover the full costs of delivery to and use by individual households	20	11	12	11	12	18	15	10	13	13	12	12	16	14
Upgrading water and sewage systems for the long-term	16	16	19	10	11	13	11	12	14	14	11	12	17	12
Pricing water services to cover the full costs of delivery to and use by companies	11	9	9	7	12	8	10	10	8	10	9	8	12	11
Raising public awareness about threats to water quality and quantity	19	11	13	9	11	12	12	12	11	12	11	10	16	16

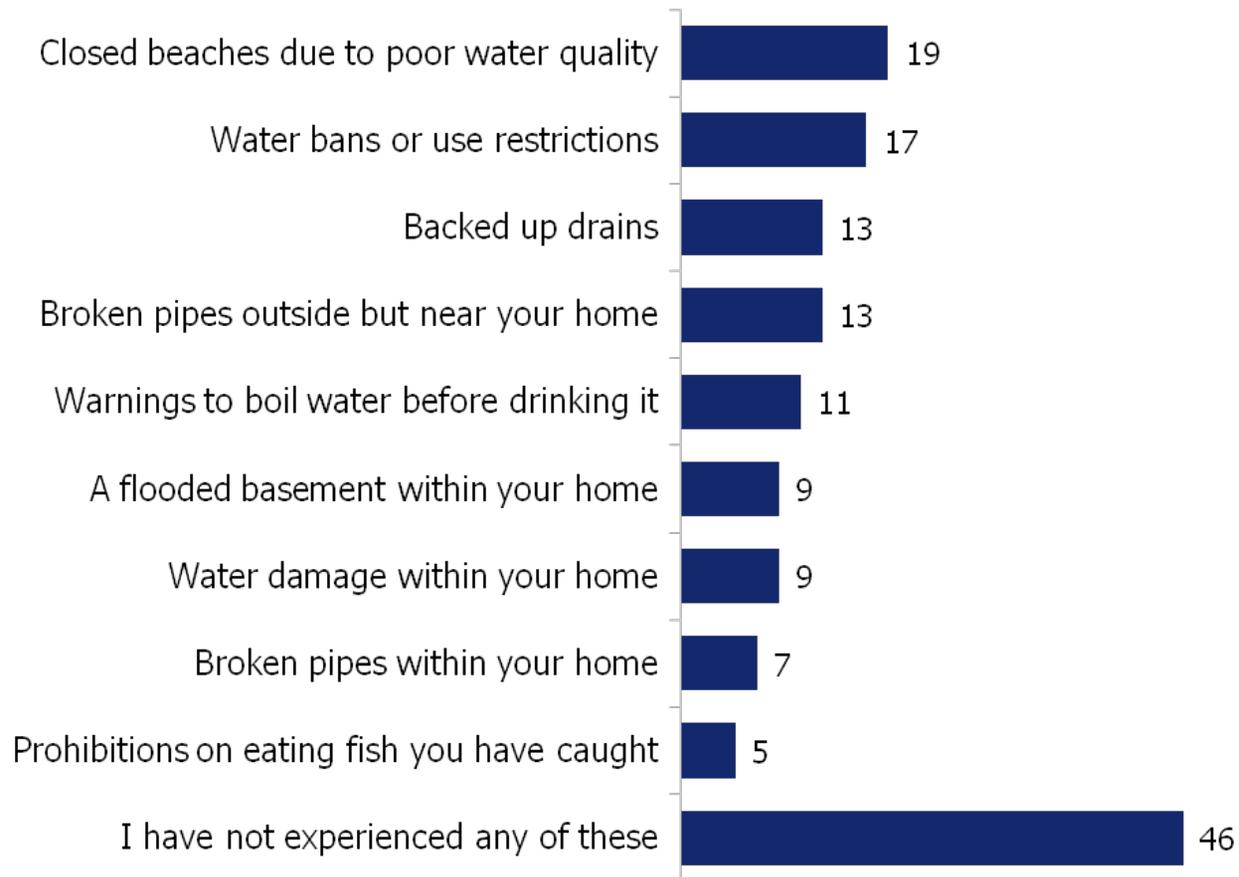
Base: Those who use municipal water supply 2012 *n*=1827

Q20. How would you rate the performance of your municipality in each of the following areas?

About half of Canadians have been inconvenienced in some way by water-related issues in the past two years

Frequency of Water-Related Inconveniences in Past Two Years

2012



Base: All respondents 2012 *n*=2428

Canadians living in BC have most likely experienced water use restrictions, while those in Ontario have most likely encountered a closed beach due to poor water quality

Frequency of Water-Related Inconveniences in Past Two Years

By Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Closed beaches due to poor water quality	8	8	15	29	16	14
Water bans or use restrictions	39	18	12	14	15	4
Backed up drains	15	12	10	15	9	11
Broken pipes outside but near your home	10	12	14	12	18	5
Warnings to boil water before drinking it	16	6	14	6	18	15
A flooded basement within your home	4	5	12	11	7	10
Water damage within your home	9	6	9	10	10	10
Broken pipes within your home	9	7	4	7	7	5
I have not experienced any of these	39	52	44	42	50	53

Most experienced water-related inconveniences	
Most likely to not have encountered any of the prompted water-related inconveniences	

Base: All respondents 2012 $n=2428$

Frequency of Water-Related Events in Past Two Years

Total Mentions, by Demographics, 2012

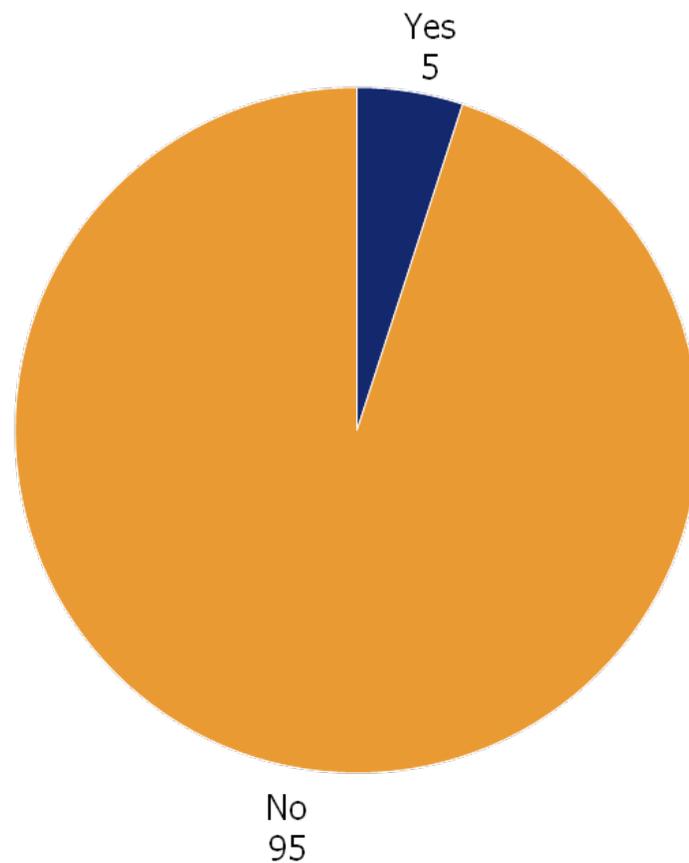
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Closed beaches due to poor water quality	8	8	15	29	16	14	20	19	18	18	20	21	20	11
Water bans or use restrictions	39	18	12	14	15	4	18	17	16	16	17	15	24	15
Backed up drains	15	12	10	15	9	11	19	11	8	14	11	15	11	7
Broken pipes outside but near your home	10	12	14	12	18	5	13	12	13	13	12	16	11	7
Warnings to boil water before drinking it	16	6	14	6	18	15	14	12	8	10	13	8	19	12
A flooded basement within your home	4	5	12	11	7	10	11	8	8	9	8	8	11	10
Water damage within your home	9	6	9	10	10	10	14	7	7	11	8	10	11	6
Broken pipes within your home	9	7	4	7	7	5	9	7	4	8	6	8	5	4
I have not experienced any of these	39	52	44	42	50	53	38	46	53	45	47	45	42	53

Base: All respondents 2012 $n=2428$

Only 5 percent of Canadians believe they have become ill from drinking water in Canada

Have Become Ill from Drinking Water in Canada

2012



Base: All respondents 2012 $n=2428$

Have Become Ill from Drinking Water in Canada

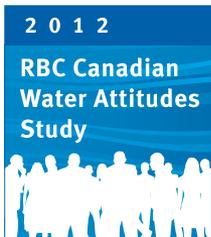
By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Yes	8	5	5	3	7	4	6	6	4	4	6	4	7	6
No	92	95	95	97	93	95	94	94	96	96	94	96	93	94

Base: All respondents 2012 *n*=2428



Our Lakes and Rivers



Canadians have many fond memories related to water when they think of time spent in the Canadian outdoors

Fondest Experiences of the Canadian Outdoors

Total Mentions, 2012



Base: All respondents 2012 $n=2428$

Water-related activities are among Canadians fondest memories of the outdoors across all regions

Fondest Experiences of the Canadian Outdoors

Total Mentions, by Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Hiking	42	40	26	31	50	34
Swimming	33	30	35	40	20	38
Spending time on the beach	32	29	40	35	28	47
Fishing	24	32	40	27	26	30
Cycling	19	17	11	17	25	12
Playing outdoor team sports	21	15	16	14	10	12
Skating	6	15	12	15	16	16
Skiing	15	17	12	10	14	9
Canoeing	7	7	9	16	7	12
Bird watching	9	7	10	10	12	7
Power boating	9	10	15	10	2	10
Hunting	7	5	11	5	6	10
Snowshoeing	5	4	3	2	12	3
Kayaking	7	2	1	4	7	6
Sailing	5	2	1	5	2	5
Climbing	5	4	1	3	2	1
Flying	2	1	1	2	1	1
None	1	1	1	0	2	0
Other	1	6	3	3	2	3
Don't know	0	2	2	1	1	1

Top ranking outdoor experience	
Second ranking outdoor experience	

Base: All respondents 2012 *n*=2428

Fondest Experiences of the Canadian Outdoors

Total Mentions, by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Hiking	42	40	26	31	50	34	39	40	33	37	39	40	37	32
Swimming	33	30	35	40	20	38	34	32	33	25	39	32	36	32
Spending time on the beach	32	29	40	35	28	47	31	34	34	27	39	32	35	36
Fishing	24	32	40	27	26	30	21	30	32	31	25	23	33	36
Cycling	19	17	11	17	25	12	22	18	15	21	16	22	15	11
Playing outdoor team sports	21	15	16	14	10	12	22	13	8	22	7	17	12	8
Skating	6	15	12	15	16	16	14	13	14	12	15	14	15	12
Skiing	15	17	12	10	14	9	17	11	10	13	12	14	10	10
Canoeing	7	7	9	16	7	12	11	11	11	10	12	10	13	12
Bird watching	9	7	10	10	12	7	5	10	14	7	12	8	11	15
Power boating	9	10	15	10	2	10	7	8	11	8	9	6	11	12
Hunting	7	5	11	5	6	10	4	6	9	9	4	4	8	12
Snowshoeing	5	4	3	2	12	3	5	5	6	4	6	5	5	6
Kayaking	7	2	1	4	7	6	8	5	2	5	5	6	4	3
Sailing	5	2	1	5	2	5	3	4	5	3	4	4	5	3
Climbing	5	4	1	3	2	1	5	2	1	4	2	3	3	2
Flying	2	1	1	2	1	1	1	2	1	3	1	2	2	2
None	1	1	1	0	2	0	0	1	0	0	1	0	1	1
Other	1	6	3	3	2	3	2	3	4	3	3	2	3	5
Don't know	0	2	2	1	1	1	2	1	1	1	1	1	1	1

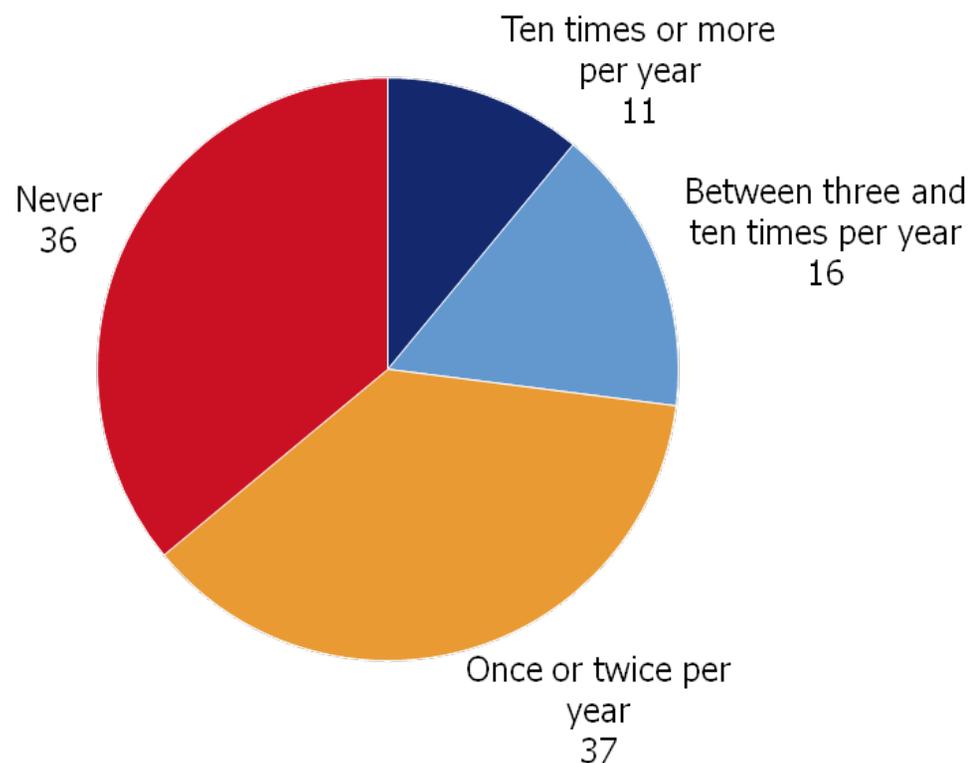
Base: All respondents 2012 $n=2428$

Q24. Thinking about your fondest experiences in the Canadian outdoors, which, if any, of the following did they involve?

Nearly two-thirds of Canadians swim in lakes or rivers at least once per year

Frequency of Swimming in Canadian Lakes or Rivers

2012



Base: All respondents 2012 $n=2428$

Those living in British Columbia, the Prairies and Ontario swim most often in lakes or rivers

Frequency of Swimming in Canadian Lakes or Rivers

By Region, 2012

	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
Never	32	41	31	33	41	41
Once or twice per year	37	37	40	37	37	33
Between three and ten times per year	17	16	20	17	14	16
Ten times or more	14	5	10	13	8	11

Base: All respondents 2012 *n*=2428

Frequency of Swimming in Canadian Lakes or Rivers

By Demographics, 2012

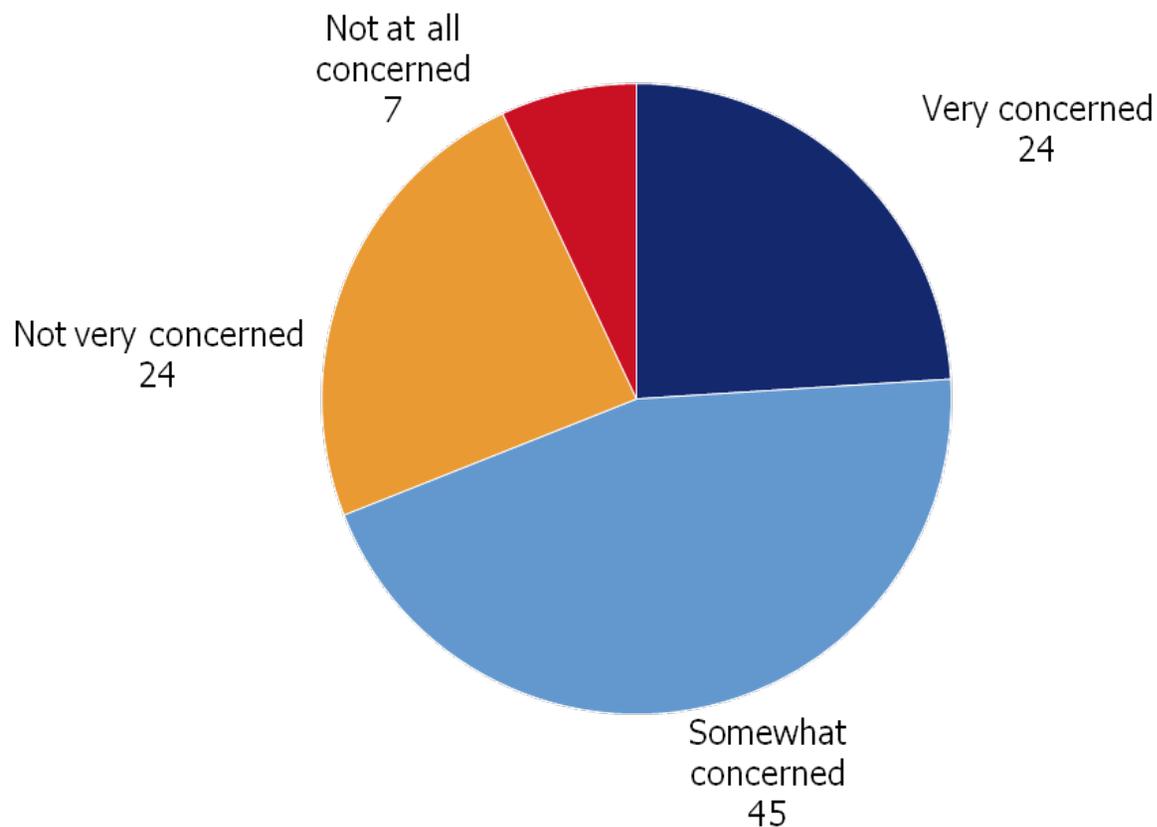
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 1000)
Never	32	41	31	33	41	41	30	33	45	36	36	38	31	36
Once or twice per year	37	37	40	37	37	33	41	38	32	39	35	39	36	32
Between three and ten times per year	17	16	20	17	14	16	19	17	14	15	18	15	20	17
Ten times or more	14	5	10	13	8	11	11	12	9	10	11	8	13	15

Base: All respondents 2012 *n*=2428

Two-thirds of Canadians who swim show concern about the water quality in the lakes and rivers where they swim

Concern about Water Quality in Rivers and Lakes Used for Swimming

2012



Base: Those who swim in lakes and rivers 2012 $n=1588$

Concern about Water Quality in Rivers and Lakes Used for Swimming

By Demographics, 2012

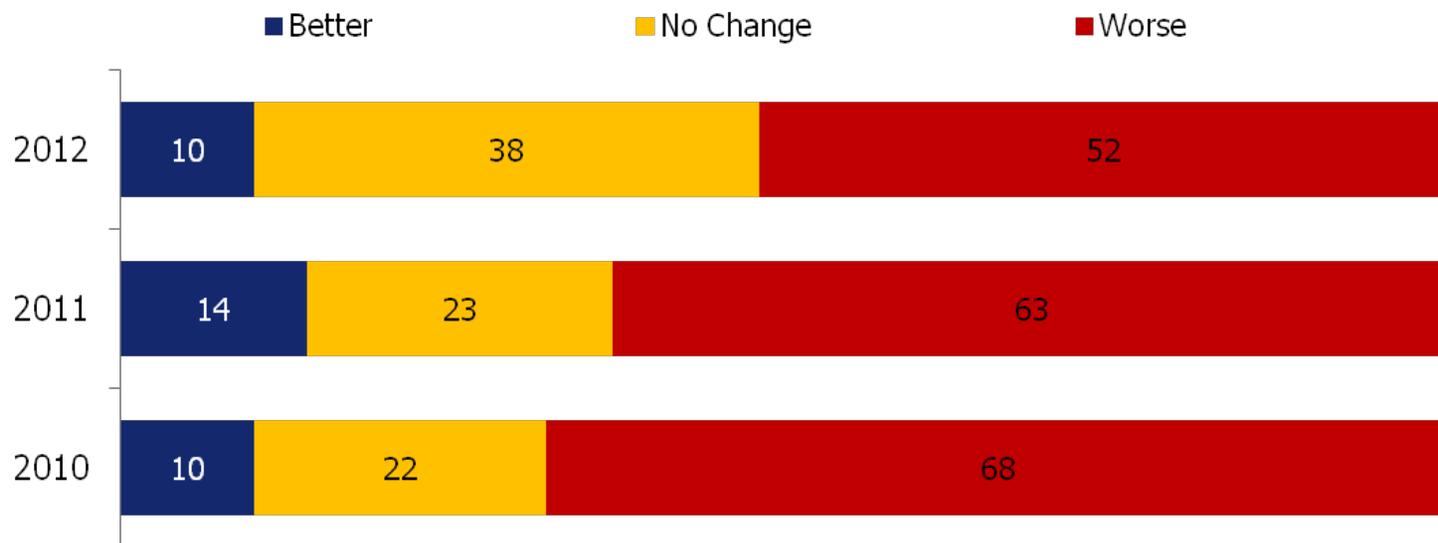
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 1000)
Very concerned	21	17	18	24	34	17	20	26	26	22	26	24	25	21
Somewhat concerned	34	42	47	50	45	41	48	45	40	44	46	45	45	45
Not very concerned	35	32	29	20	19	27	28	22	24	27	22	26	23	22
Not at all concerned	10	9	7	6	2	14	4	7	10	7	6	5	7	12

Base: Those who swim in lakes and rivers 2012 *n*=1588

Q26. How concerned are you about the quality of water in the lakes or rivers in which you swim?

Although a majority of Canadians feels that the quality of water in lakes and rivers is worsening, they are more likely than they were in 2011 to believe the quality is not changing

Change in Quality of Water in Lakes and Rivers Used for Swimming 2010–2012



↑ "No Change"	2011–2012
↓ "Worse"	2011–2012

Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$;

Change in Quality of Water in Lakes and Rivers Used for Swimming

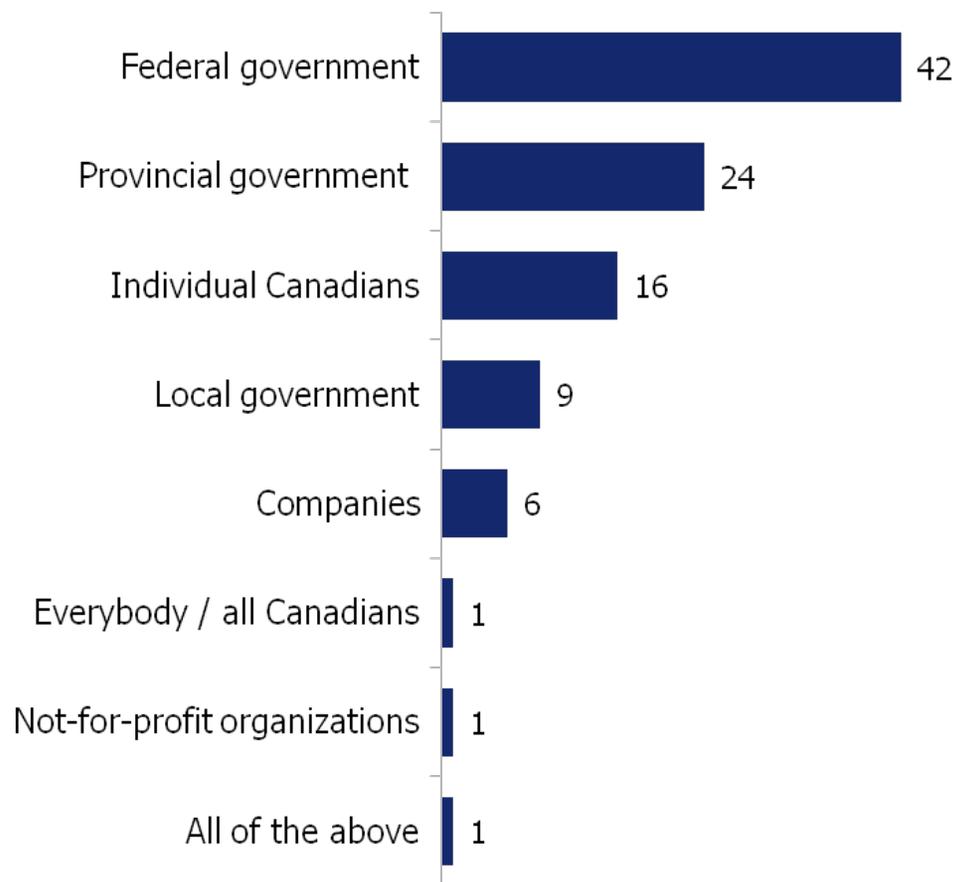
By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 1000)
Better	4	4	6	14	13	5	6	9	15	11	9	10	9	11
Worse	47	51	55	50	57	49	56	53	45	48	55	52	54	49
No change	49	44	38	36	30	46	37	38	39	41	35	38	36	39

Base: All respondents 2012 *n*=2428; 2011 *n*=2066; 2010 *n*=2022;

The federal government is held most responsible for improving water quality by Canadians

Agency Most Responsible for Improving Water Quality in Lakes and Rivers in Canada
2012



Base: All respondents 2012 $n=2428$

76 Q28. Who should be held most responsible for working to improve the quality of water in lakes and rivers in Canada?

Agency Most Responsible for Improving Water Quality in Lakes and Rivers in Canada

By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 1000)
Federal government	40	42	46	50	27	42	39	41	44	43	41	44	35	41
Provincial government	33	27	29	26	15	20	26	23	24	24	23	24	25	23
Individual Canadians	9	10	9	7	37	10	12	18	13	13	17	13	19	16
Local government	8	10	9	8	10	10	12	9	6	9	9	9	9	8
Companies	6	6	4	5	7	13	7	6	6	8	5	7	6	7
Not for profit organizations	2	2	0	1	1	1	1	1	1	2	1	1	2	1
All of the above	0	0	0	1	1	0	0	0	2	0	1	0	1	1

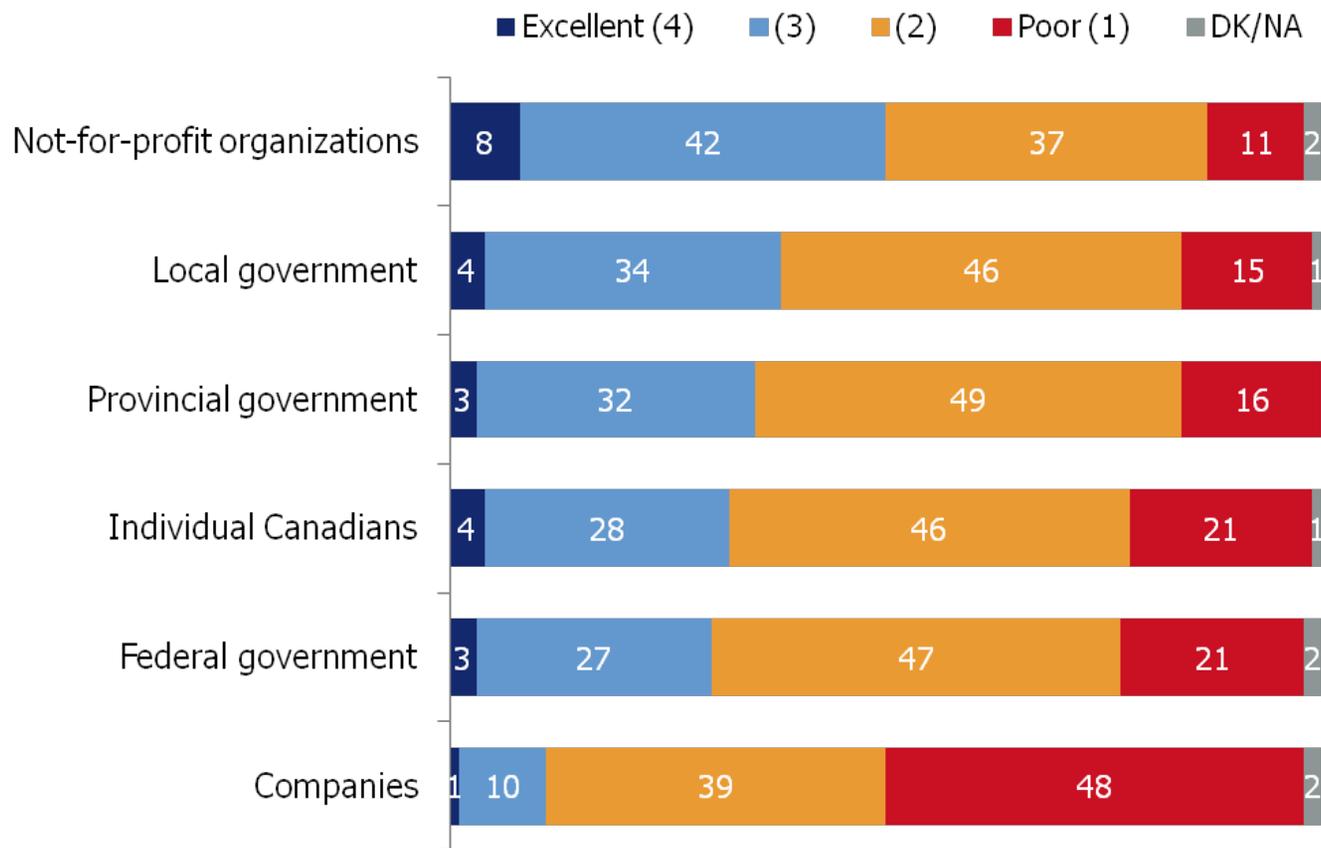
Base: All respondents 2012 *n*=2428

Q28. Who should be held most responsible for working to improve the quality of water in lakes and rivers in Canada?

While the efforts of not-for-profits are well-perceived when it comes to working to improve water quality, corporate efforts are perceived poorly

Performance Ratings of Agencies Working to Improve Water Quality in Lakes and Rivers in Canada

2012



Base: All respondents 2012 *n*=2428

Performance Rating of Agencies Working to Improve Water Quality in Lakes and Rivers in Canada

“Excellent”, by Demographics, 2012

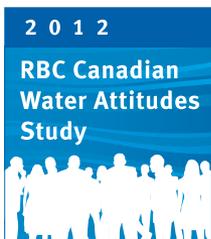
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 1000)
Not for profit organizations	11	10	8	6	9	6	10	7	7	8	8	8	8	7
Local government	3	3	2	4	5	2	5	3	4	4	3	4	4	3
Provincial government	3	4	2	3	3	0	3	2	2	3	2	3	3	1
Individual Canadians	6	3	3	5	3	4	6	3	4	5	4	5	4	3
Federal government	4	3	2	3	3	1	5	3	2	4	2	4	2	1
Companies	1	1	1	2	1	1	2	1	1	2	1	2	1	0

Base: All respondents 2012 *n*=2428

Q29. How would you rate the performance of each of the following in working to improve the quality of water in lakes and rivers in Canada?

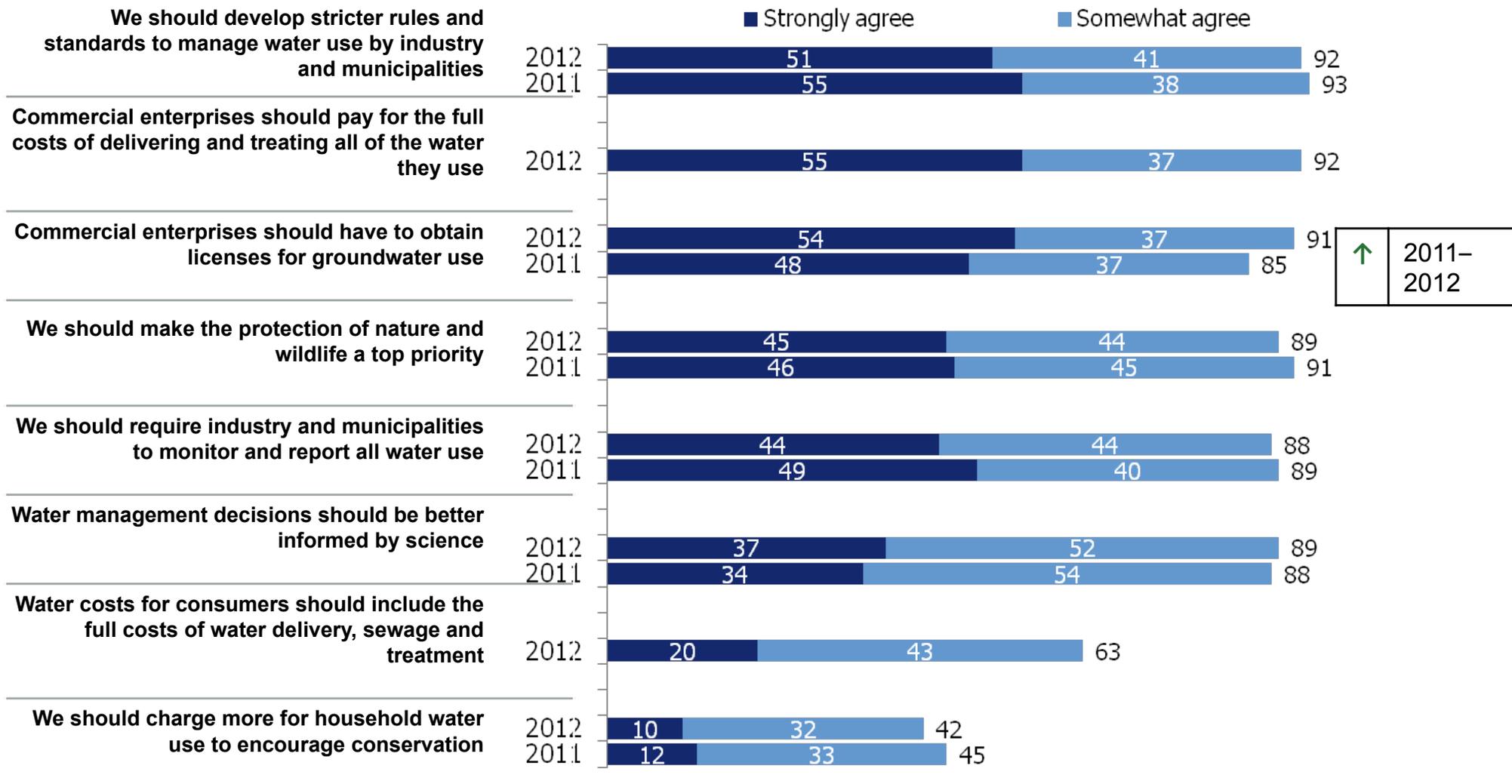


Conservation and Consumption



Methods of Protecting and Managing Fresh Water

“Strongly agree” or “Somewhat agree”, 2011–2012



Base: All respondents 2012 *n*=2428; 2011 *n*=2066

Methods of Protecting and Managing Fresh Water

“Strongly agree” and “Somewhat agree”, by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 10000)
We should develop stricter rules and standards to manage water use by industry and municipalities	89	89	92	93	94	91	89	93	95	91	93	92	94	92
Commercial enterprises should pay for the full costs of delivering and treating all of the water they use	94	89	90	92	90	94	89	91	96	91	92	90	93	94
Commercial enterprises should have to obtain licenses for groundwater use	91	91	89	91	93	87	89	90	94	90	92	91	91	89
We should make the protection of nature and wildlife a top priority	84	89	85	89	92	91	87	90	89	87	90	89	90	89
We should require industry and municipalities to monitor and report all water use	92	87	85	88	85	84	86	86	90	89	86	87	88	86
Water management decisions should be better informed by science	90	90	85	92	82	94	88	87	91	89	88	89	87	88
Water costs for consumers should include the full costs of water delivery, sewage and treatment	68	67	66	66	58	57	58	61	72	66	62	62	66	65
We should charge more for household water use to encourage conservation	48	41	44	40	41	36	45	39	42	44	39	44	38	37

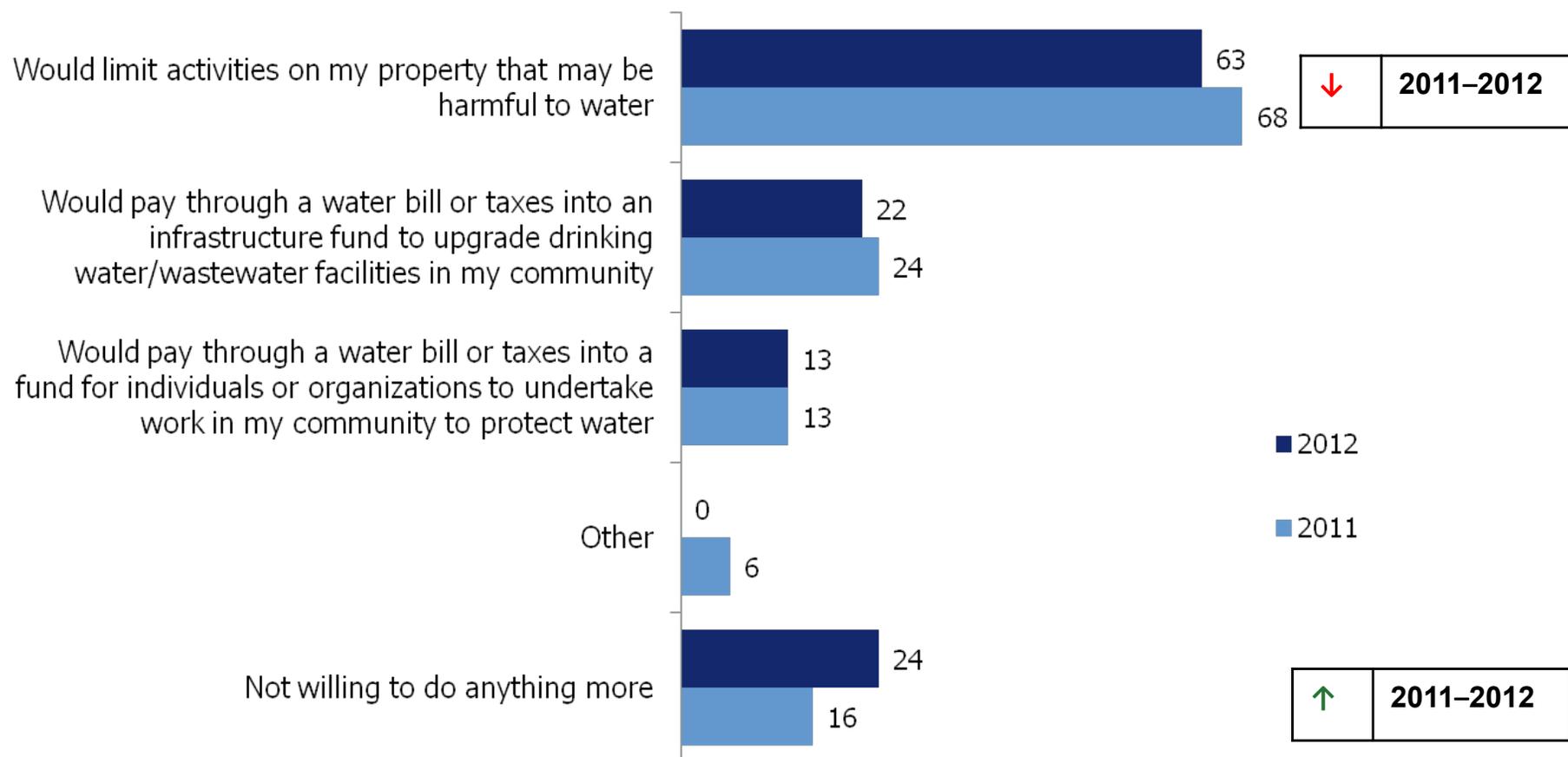
Base: All respondents 2012 *n*=2428;

Q8t. 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

Although most Canadians indicate they are willing to limit activities harmful to water on their property, slightly fewer Canadians indicate this willingness compared to 2011

Willingness to Take Measures to Ensure Safe Drinking Water

2011–2012



Base: All respondents 2012 $n=2428$; 2011 $n=2066$

Willingness to Take Measures to Ensure Safe Drinking Water

Total Mentions, by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 10000)
Would limit activities on my property that may be harmful to water	60	63	57	61	69	68	65	64	61	60	66	63	66	62
Would pay through a water bill or taxes into an infrastructure fund to upgrade drinking water/wastewater facilities in my community	20	24	32	23	17	21	22	19	25	24	19	24	21	15
Would pay through a water bill or taxes into a fund for individuals or organizations to undertake work in my community to protect water	15	14	15	12	12	11	16	12	12	14	12	15	13	8
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Not willing to do anything more	22	27	27	26	19	22	22	25	25	26	22	24	21	27

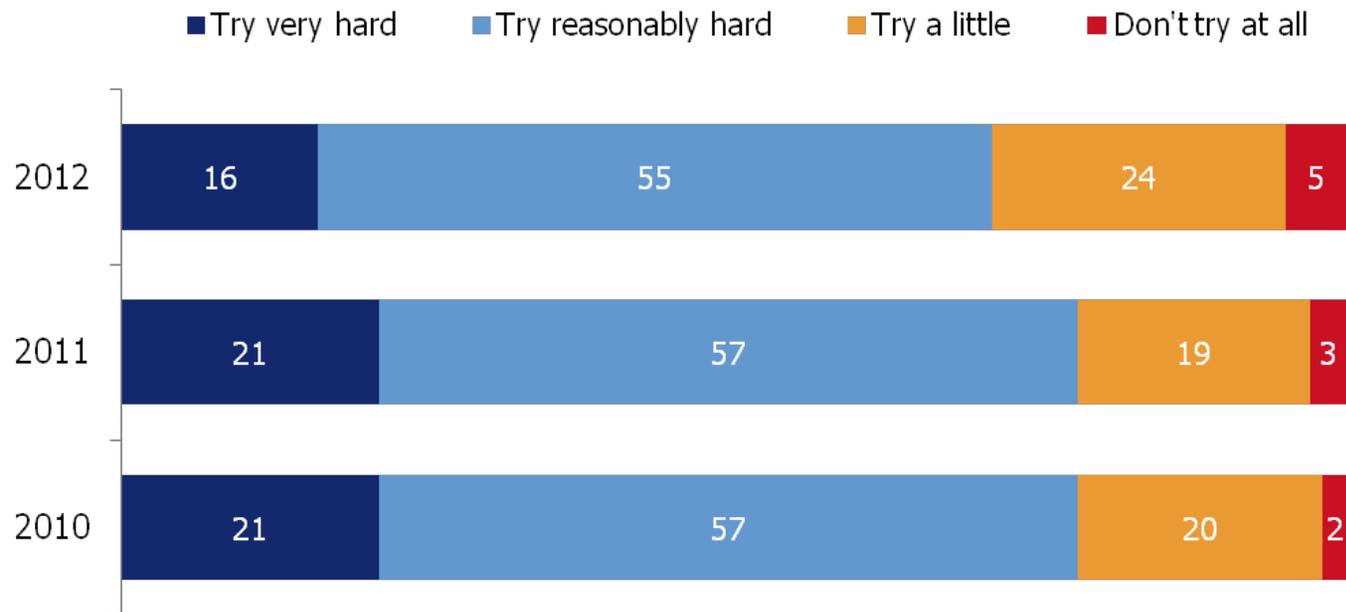
Base: All respondents 2012 *n*=2428;

Q21t. What would you be willing to undertake – beyond what you currently do – to ensure safe drinking water and/or wastewater disposal for your home?

Similar to past years, about half of Canadians report they try reasonably hard to conserve water

Extent of Personal Effort to Conserve Water

2010–2012



Base: All respondents 2012 $n=2428$; 2011 $n=2066$; 2010 $n=2022$

Extent of Personal Effort to Conserve Water

By Demographics, 2012

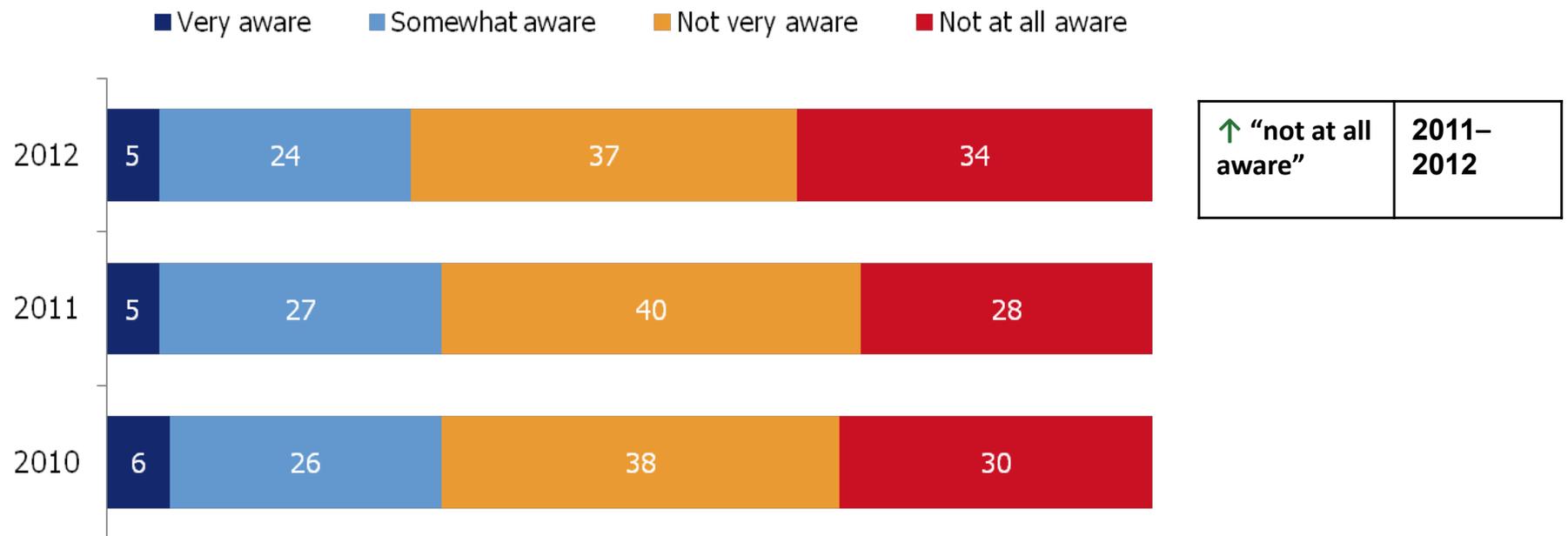
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Try very hard	19	17	11	18	13	19	11	17	20	13	19	15	17	18
Try reasonably hard	48	53	50	51	68	49	49	56	59	53	57	54	59	53
Try a little	32	25	33	24	16	24	35	22	16	27	21	25	20	24
Don't try at all	1	5	6	7	3	8	6	5	4	7	3	6	3	4

Base: All respondents 2012 *n*=2428

Canadians do not report strong awareness of local government water conservation initiatives; in 2012, more Canadians report that they are completely unaware

Awareness of Local Government Initiatives to Conserve Water

2010–2012



Base: All respondents 2012 $n=2428$; ; 2011 $n=2066$; 2010 $n=2022$

Q32t. Are you aware of any initiatives that your local government is undertaking in order to encourage its citizens to conserve water?

Awareness of Local Governmental Initiatives to Conserve Water

By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Very aware	7	5	2	5	4	3	2	5	6	5	4	5	6	3
Somewhat aware	31	26	23	26	19	19	21	24	27	29	20	26	26	17
Not very aware	36	33	33	32	48	30	40	37	32	35	38	37	34	37
Not at all aware	25	36	42	36	30	48	36	33	34	31	38	31	34	44

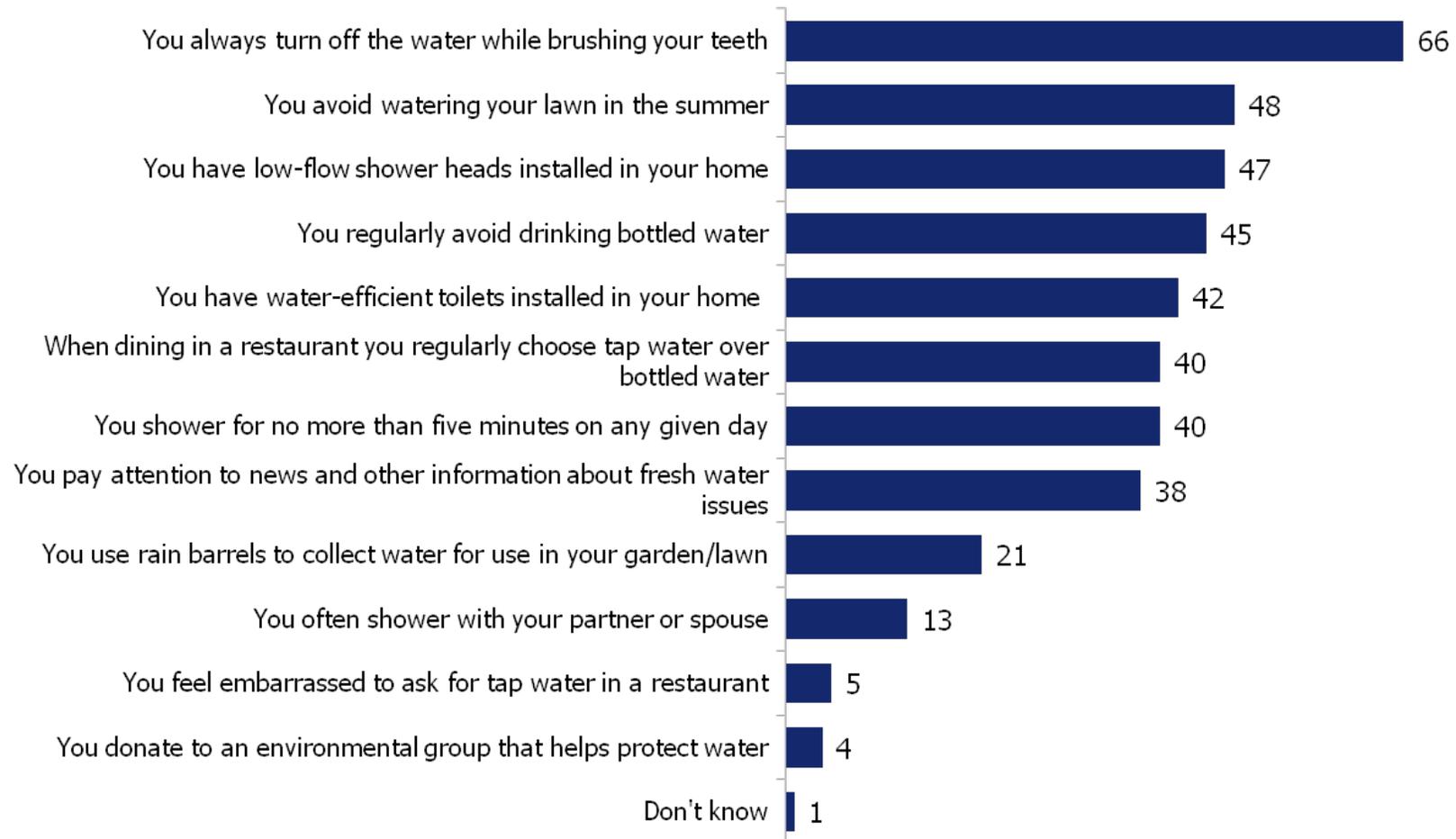
Base: All respondents 2012 $n=2428$; ; 2011 $n=2066$; 2010 $n=2022$

88 Q32t. Are you aware of any initiatives that your local government is undertaking in order to encourage its citizens to conserve water?

While many Canadians regularly engage in “water-friendly” behaviours, Canadians are less likely to use rain barrels or donate to environmental groups

Frequency of Water Consumption Behaviors

Total Mentions, 2012



Base: All respondents 2012 *n*=2428

Frequency of Water Consumption Behaviours

Total Mentions, by Demographics, 2012

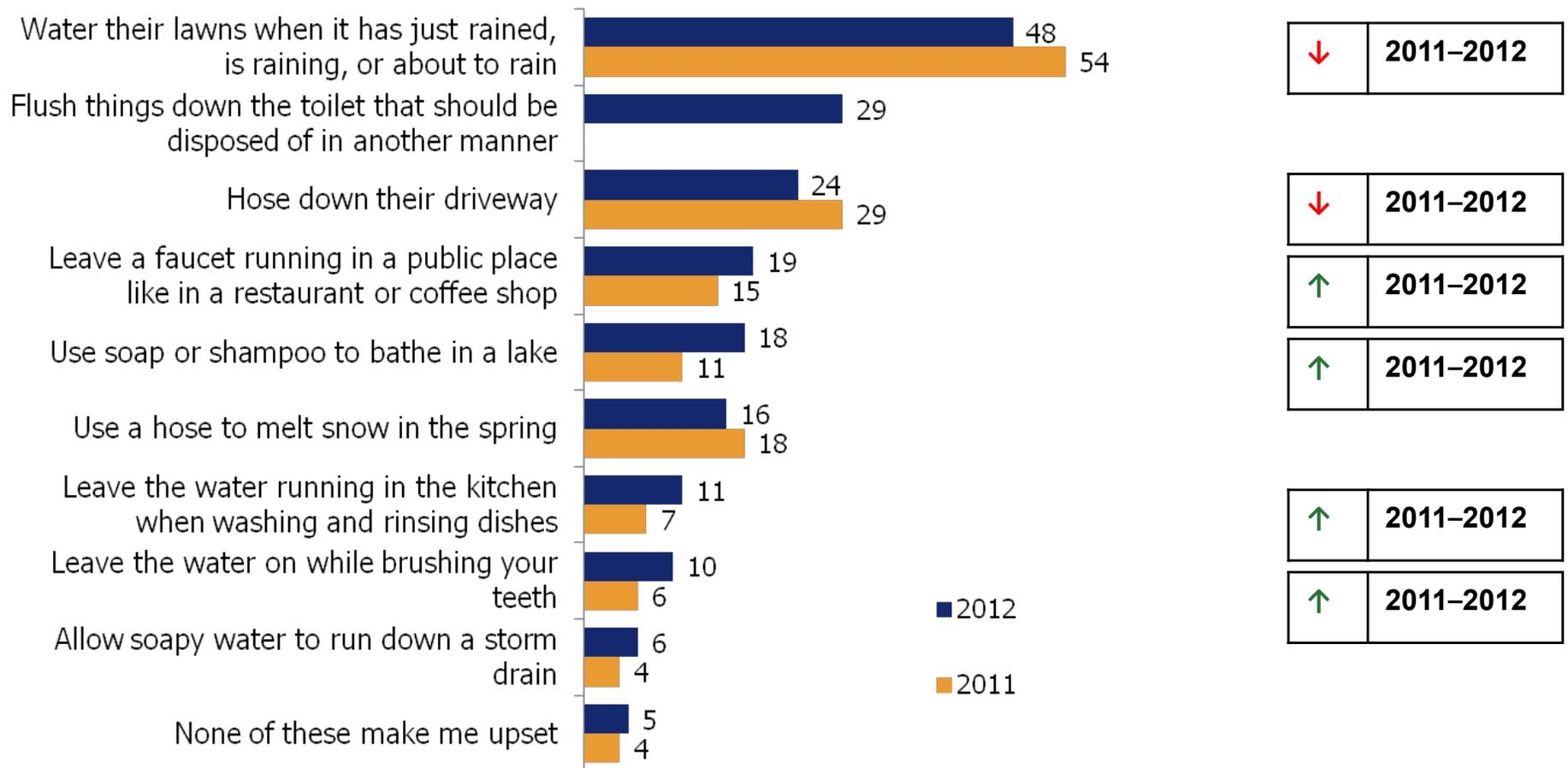
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 10000)
You always turn off the water while brushing your teeth	74	66	68	62	66	66	70	66	60	61	70	65	68	65
You avoid watering your lawn in the summer	42	39	50	46	52	61	37	50	54	40	55	36	63	67
You have low-flow shower heads installed in your home	44	40	49	48	48	52	32	49	59	44	50	41	57	57
You regularly avoid drinking bottled water	49	48	44	49	36	53	43	40	54	44	46	47	42	45
You have water efficient toilets installed in your home	39	44	46	47	33	48	28	44	55	38	47	35	49	56
When dining in a restaurant you regularly choose tap water over bottled water	44	45	43	39	37	38	42	35	46	37	43	42	37	38
You shower for no more than five minutes on any given day	45	40	41	43	32	41	25	36	60	39	41	35	47	49
You pay attention to news and other information about fresh water issues	41	41	30	40	35	35	33	34	49	37	39	37	41	38
You use rain barrels to collect water for use in your garden/lawn	12	30	35	21	19	20	13	24	25	17	25	13	31	35
You often shower with your partner or spouse	11	17	9	11	16	15	21	14	5	13	13	13	15	11
You feel embarrassed to ask for tap water in a restaurant	5	4	3	3	12	2	8	6	3	6	5	6	7	3
You donate to an environmental group that helps protect water	5	3	2	6	3	5	4	3	6	5	4	4	4	5
Don't know	1	1	3	2	1	0	2	1	1	1	1	1	1	1

Base: All respondents 2012 n=2428

Canadians continue to get most upset when they see others water their lawns unnecessarily

Water Consumption Behaviours: What Upsets You the Most?

Total Mentions, 2011–2012



Base: All respondents 2012 *n*=2428; 2011 *n*=2066

Water Consumption Behaviours: What Upsets You the Most?

Total Mentions, by Demographics, 2012

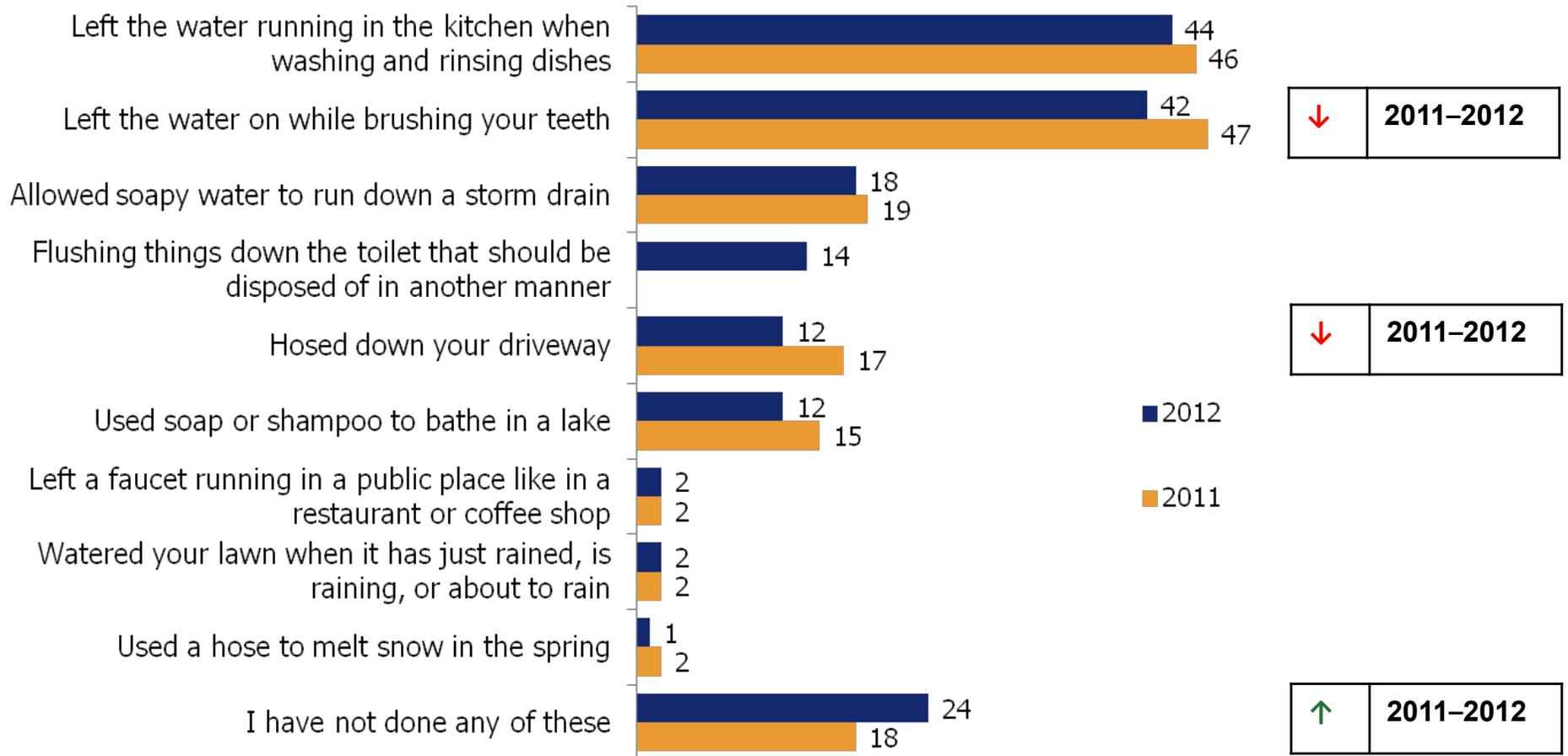
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural
Hosed down your driveway	20	15	15	17	48	19	25	27	21	23	26	25	28	19
Allowed soapy water to run down a storm drain	7	11	2	8	3	2	6	6	7	6	6	7	5	4
Watered your lawn when it has just rained, is raining, or about to rain	50	58	52	47	46	42	42	50	52	44	52	45	55	51
Left a faucet running in a public place like in a restaurant or coffee shop	21	20	23	22	11	24	25	19	15	22	17	20	16	22
Left the water running in the kitchen when washing and rinsing dishes	10	9	18	12	7	13	10	9	13	9	12	11	9	10
Left the water on while brushing your teeth	10	11	11	10	8	9	14	10	5	10	9	11	7	6
Used a hose to melt snow in the spring	13	9	7	11	32	8	19	16	12	16	16	16	17	15
Used soap or shampoo to bathe in a lake	21	16	17	22	13	18	16	18	21	17	19	18	19	20
Flushing things down the toilet that should be disposed of in another manner	29	31	34	28	24	45	23	27	38	30	29	27	29	35
None of these make me upset	4	5	7	6	1	6	5	5	4	6	3	5	4	4

Base: All respondents 2012 *n*=2428

Nearly one-half of Canadians admit to leaving the water running while doing dishes and while brushing their teeth

Water Consumption Behaviours: What Have you Done?

Total Mentions, 2011–2012



Base: All respondents 2012 *n*=2428; 2011 *n*=2066

Water Consumption Behaviours: What Have You Done?

Total Mentions, by Demographics, 2012

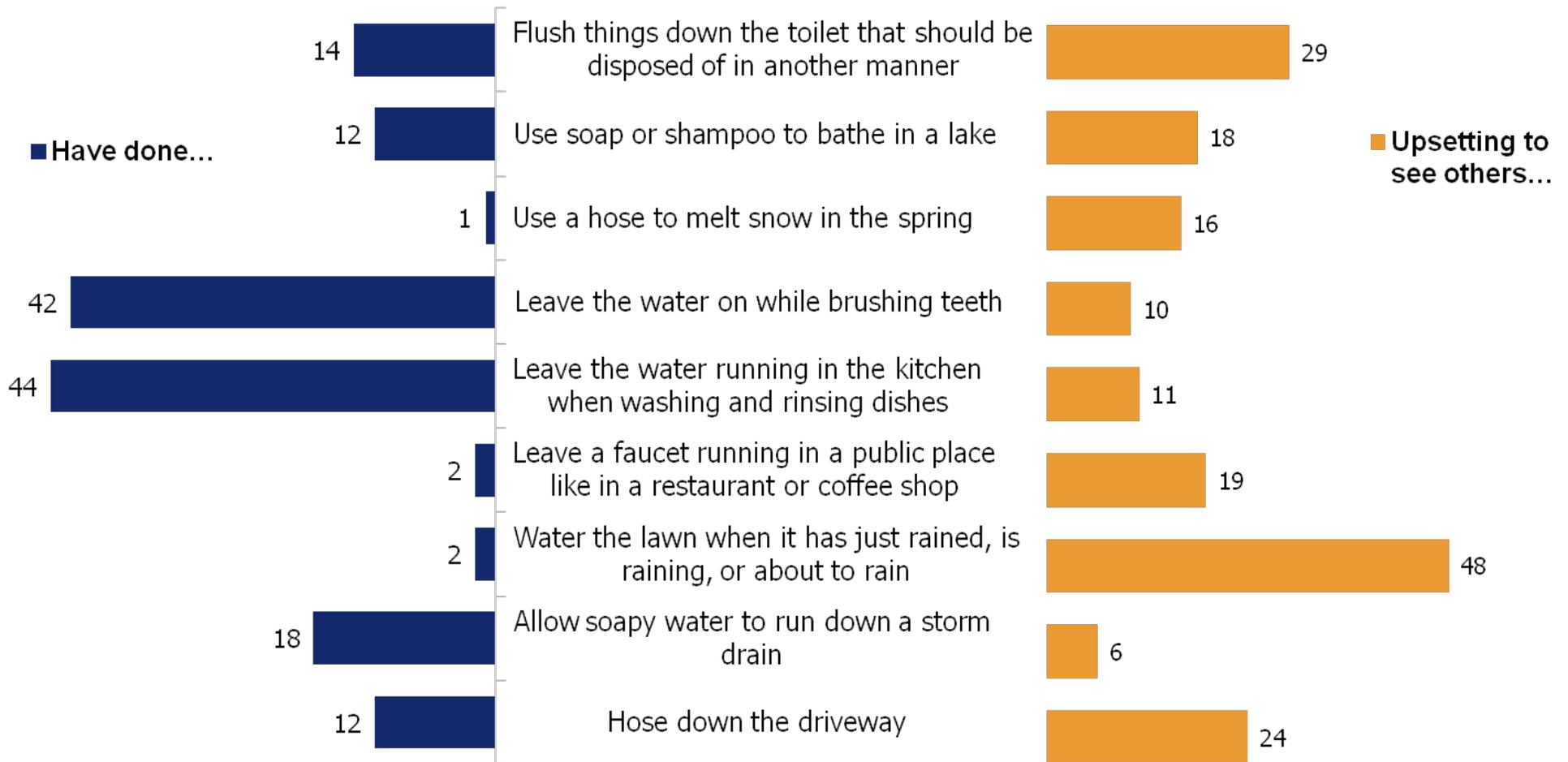
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural
Hosed down your driveway	18	14	10	14	7	9	12	12	12	16	8	13	14	8
Allowed soapy water to run down a storm drain	23	16	20	19	16	14	24	17	13	23	14	20	20	12
Watered your lawn when it has just rained, is raining, or about to rain	4	3	1	2	2	1	3	2	1	2	2	2	2	0
Left a faucet running in a public place like in a restaurant or coffee shop	2	2	2	3	3	1	4	2	1	3	2	3	3	1
Left the water running in the kitchen when washing and rinsing dishes	46	49	41	44	43	38	45	44	43	42	46	45	42	42
Left the water on while brushing your teeth	40	41	41	43	41	48	38	41	47	42	42	40	44	45
Used a hose to melt snow in the spring	1	2	0	2	1	1	2	2	1	2	1	2	1	1
Used soap or shampoo to bathe in a lake	10	13	11	15	8	14	13	13	10	13	12	11	14	14
Flushing things down the toilet that should be disposed of in another manner	21	18	18	14	8	15	21	12	11	16	13	17	12	10
I have not done any of these	24	22	27	25	24	25	21	25	26	25	24	24	22	26

Base: All respondents 2012 *n*=2428

Canadians report being upset when seeing others do certain activities, but admit to doing some of these activities themselves

Water Consumption Behaviours

Combined Mentions, 2012



Base: All respondents 2012 *n*=2428; ; 2011 *n*=2066

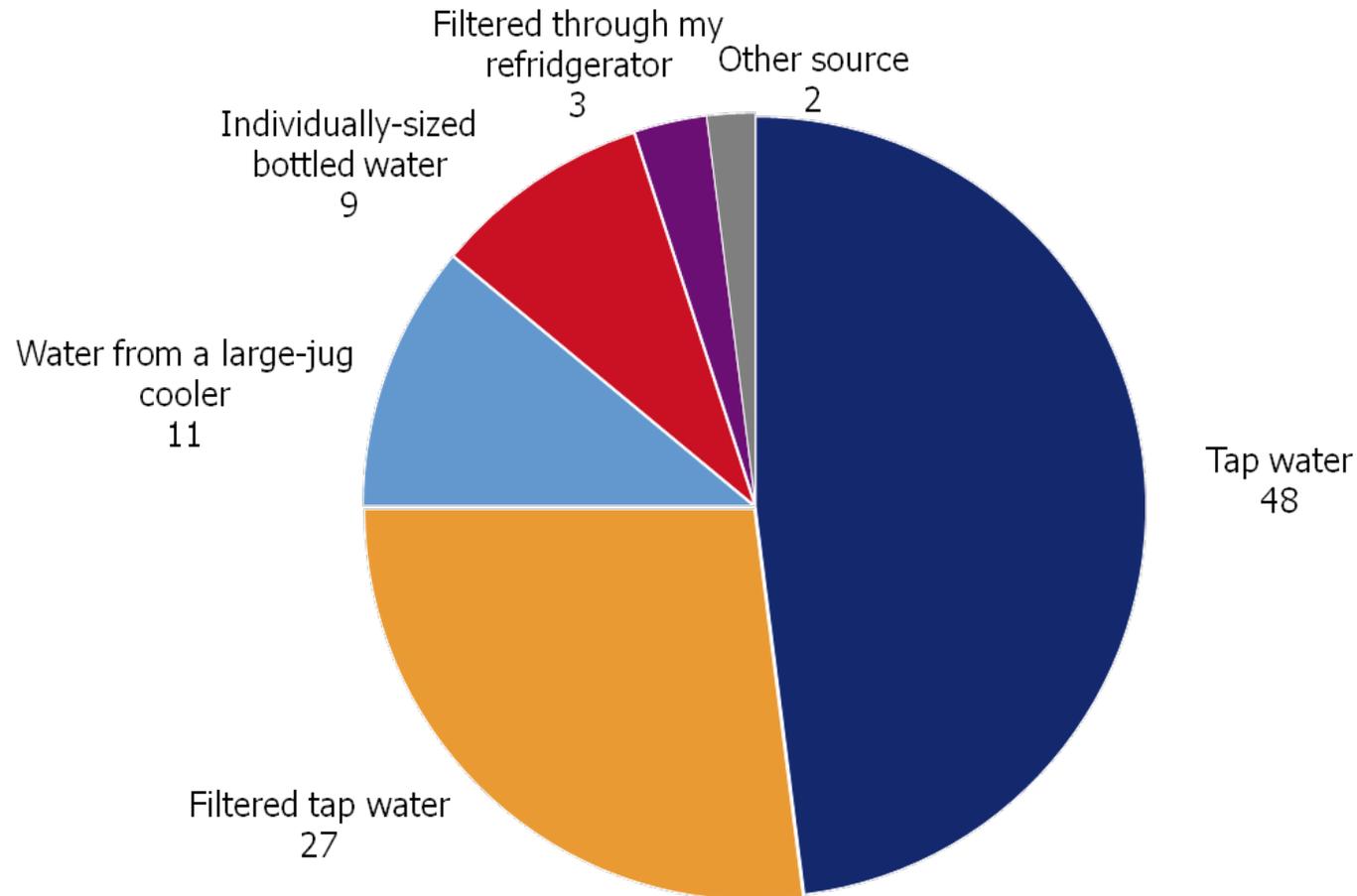
Q34. Which of the following activities, if any, upsets you the most?

Q35. Which of the following, if any, have you knowingly done?

Three-quarters of Canadians drink tap water when at home

Typical Source of Drinking Water at Home

2012



Base: All respondents 2012 $n=2428$

Typical Source of Drinking Water at Home

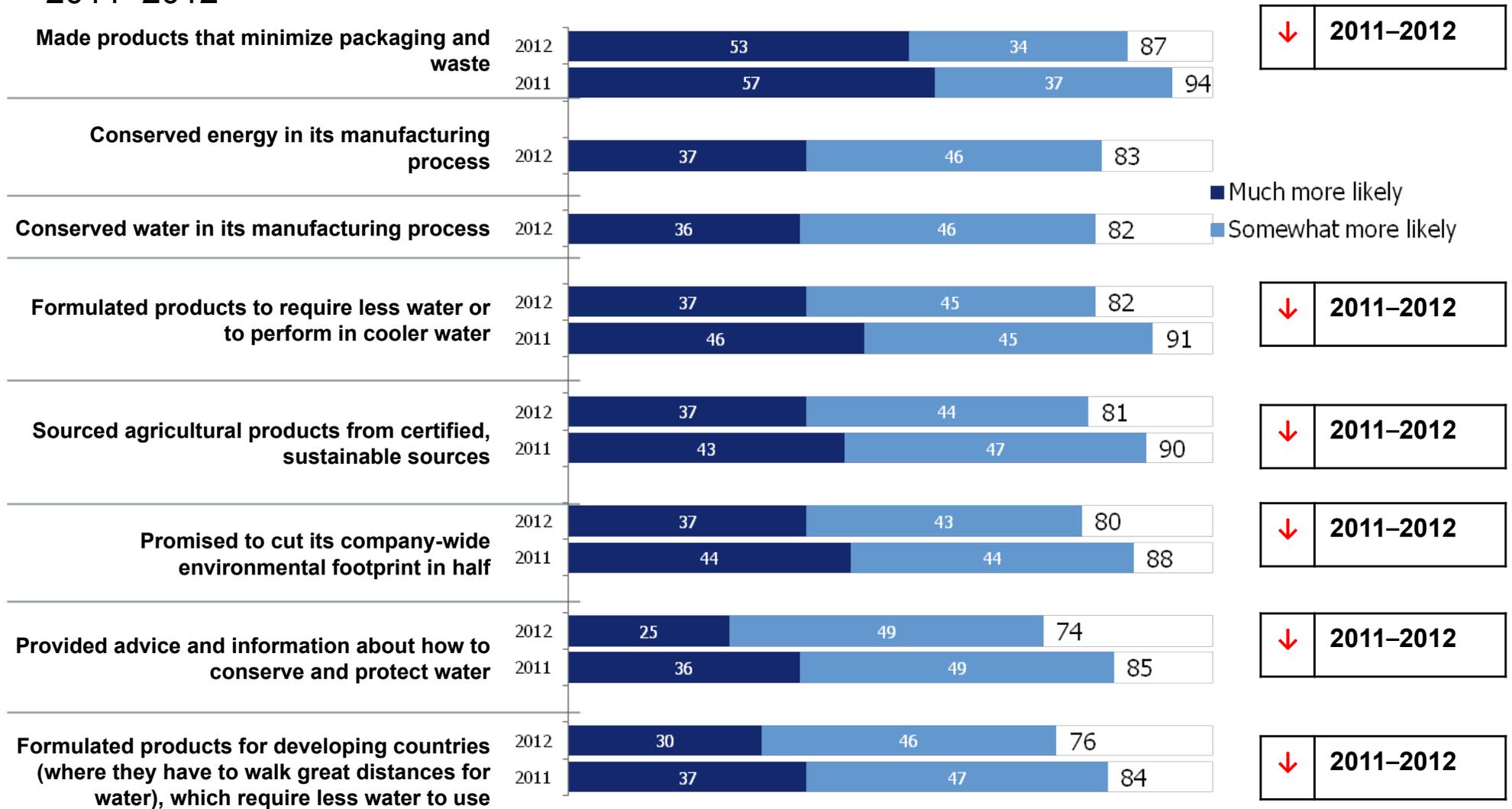
By Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (<1000)
Tap water	43	47	42	43	59	49	47	46	51	50	45	51	45	41
Filtered tap water	31	29	30	32	14	33	29	27	25	27	27	28	24	27
Water from a large jug-cooler	13	11	20	9	10	12	11	12	10	9	13	6	17	19
Individually-sized bottled water	7	7	4	10	14	2	10	11	8	10	9	11	8	8
Filtered through my refrigerator	3	5	4	3	1	1	2	3	3	2	3	2	3	4
Well / spring / natural source	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other source	3	0	0	2	2	3	1	2	3	2	2	1	3	2

Base: All respondents 2012 *n*=2428; 2011 *n*=2066; 2010 *n*=2022; 2009 *n*=2165

Canadians are generally less likely than they were in 2011 to make purchasing decision based on a company's environmental behaviour

Increased Likelihood of Buying Products from Companies Based on Environmental Behaviours 2011–2012



Base: All respondents 2012 n=2428; 2011 n=2066

Increased Likelihood of Buying Products from Companies Based on Environmental Behaviours

“Much more likely” and “Somewhat more likely”, by Demographics, 2012

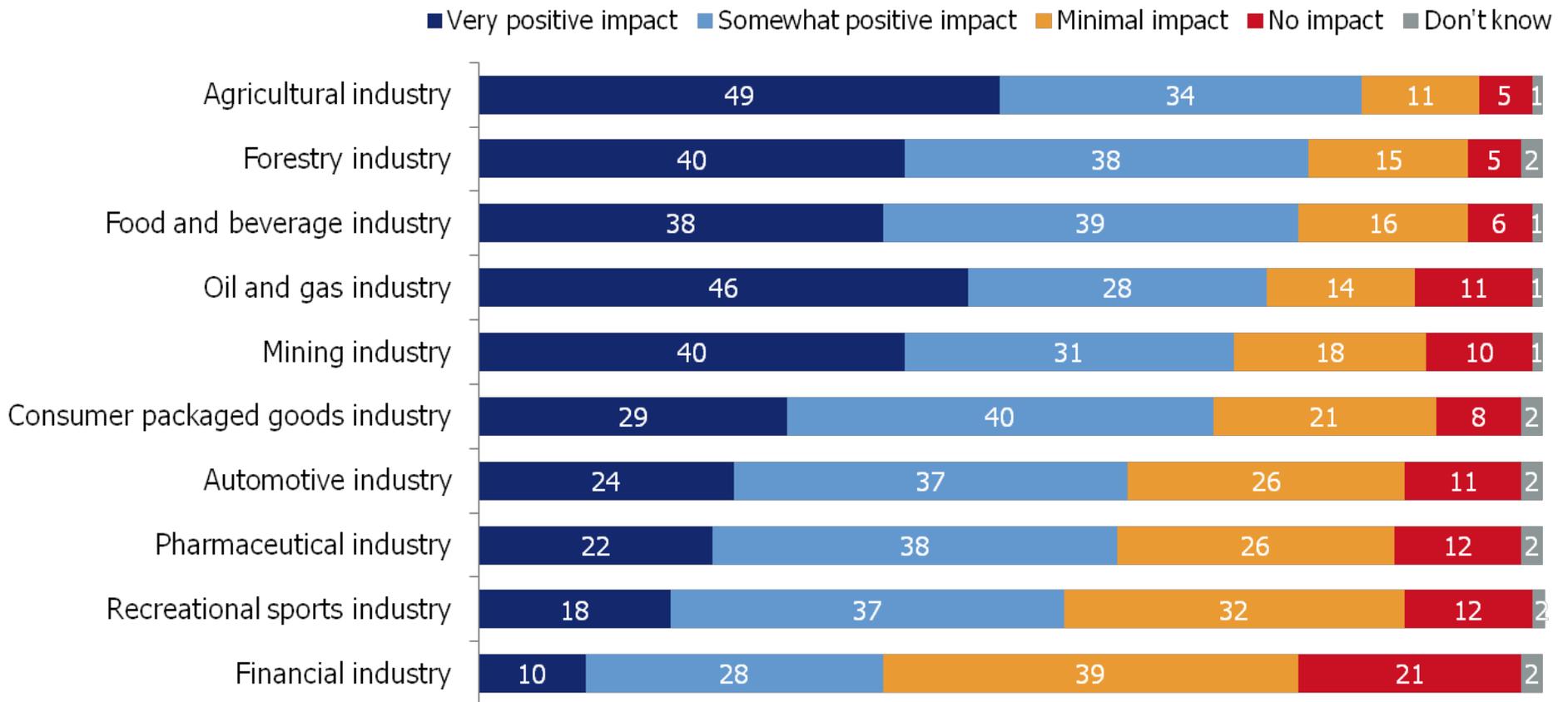
	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 100 000)
Made products that minimize packaging and waste	91	87	80	87	86	89	87	85	89	85	89	85	90	88
Formulated products to require less water or to perform in cooler water	85	82	76	82	83	83	84	80	84	81	84	82	85	80
Sourced agricultural products from certified, sustainable sources	88	81	78	81	81	84	82	81	82	80	84	81	83	83
Promised to cut its company-wide environmental footprint in half	86	81	69	81	80	80	85	78	80	79	82	80	81	79
Provided advice and information about how to conserve and protect water.	75	72	65	74	76	73	74	72	75	72	75	73	76	74
Formulated products for developing countries (where they have to walk great distances for water), which require less water to use	79	78	68	75	81	73	83	72	76	76	77	79	76	70
Conserved energy in its manufacturing process	87	83	77	81	84	87	84	80	85	81	85	82	83	84
Conserved water in its manufacturing process	85	83	75	81	82	86	83	80	84	81	83	82	84	81

Base: All respondents 2012 *n*=2428

Q36t. To what extent, if at all, would the following make you more likely to purchase a company’s products? If you knew that the company...

While the agricultural, forestry, food & beverage, and oil & gas industries are perceived to have the largest positive impact on water related issues, the financial industry is perceived to have the least potential to have an impact

Potential Positive Impact of Selected Industries on Water Conservation and Water Quality
2012



Base: All respondents 2012 *n*=2428

Q37. How much of a positive impact do you think each of the following industries could have in the area of 100 water conservation and protecting water quality?

Potential Positive Impact of Selected Industries on Water Conservation and Water Quality

“Very positive” and “Somewhat positive”, by Demographics, 2012

	REGION						AGE			GENDER		COMMUNITY SIZE		
	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic	18 to 34 years	35 to 55 years	>55 years	Male	Female	Urban (> 100 000)	Mid-size towns/cities	Rural (< 10000)
Agricultural industry	86	81	82	83	84	84	80	82	88	81	85	83	84	85
Forestry industry	77	75	78	80	74	81	75	75	84	75	81	76	78	82
Food and beverage industry	79	73	74	76	76	80	70	75	85	73	79	74	79	81
Oil and gas industry	73	80	77	74	68	79	65	74	81	71	76	70	78	79
Mining industry	70	73	74	73	65	76	58	72	82	69	72	67	75	80
Consumer packaged goods industry	67	67	71	69	70	75	66	67	74	64	74	67	72	72
Automotive industry	56	55	63	65	59	67	54	62	67	59	64	59	64	66
Pharmaceutical industry	54	52	59	64	61	63	49	58	74	56	64	56	67	66
Recreational sports industry	55	54	58	55	51	64	48	52	64	50	59	52	57	61
Financial industry	38	33	41	41	37	35	39	38	39	34	44	40	38	35

Base: All respondents 2012 *n*=2428

101 Q37. How much of a positive impact do you think each of the following industries could have in the area of water conservation and protecting water quality?