



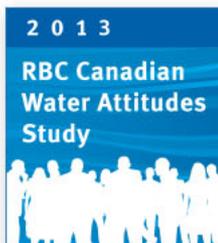
2013

RBC Canadian Water Attitudes Study

Whither Water with Extreme Weather

Webinar Presentation

26 March 2013



RBC
Blue Water
Project™

Introductions by:

Lynn Patterson

Director, Corporate Responsibility, RBC



Presented by:

Chris Coulter

President, GlobeScan



and

Bob Sandford

EPCOR Chair

Canadian Partnership Initiative

United Nations Water for Life Decade



Six Years of RBC Survey Results: What Canadians Know and Think About Water



**RBC Canadian
Water Attitudes
Study**



2008

Canadians over-confident in country's supply of fresh water new poll by Unilever and RBC reveals

2009

Majority of Canadians consider water to be Canada's most important natural resource

2010

Canadians' water conservation efforts declining: 2010 Canadian Water Attitudes Study

2011

**2011 Canadian Water Attitudes Study:
Three Quarters of Canadians Using Toilet as Garbage Can**

2012

Out of Sight, Out Of Mind: RBC Study Finds Majority of Canadians Believe Their Local Water Infrastructure Is Good Enough for Now

2013 RBC Canadian Water Attitudes Study: Urban-dwellers ill-prepared for impact of Mother Nature on water

Urban sprawl and paved paradise threaten clean fresh water today and tomorrow, says leading expert



**RBC
Blue Water
Project™**

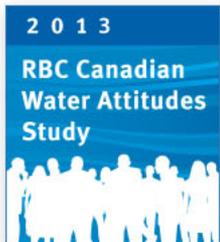
Agenda

- Introductions
- Context
- Infrastructure
- Behaviour
- Q & A

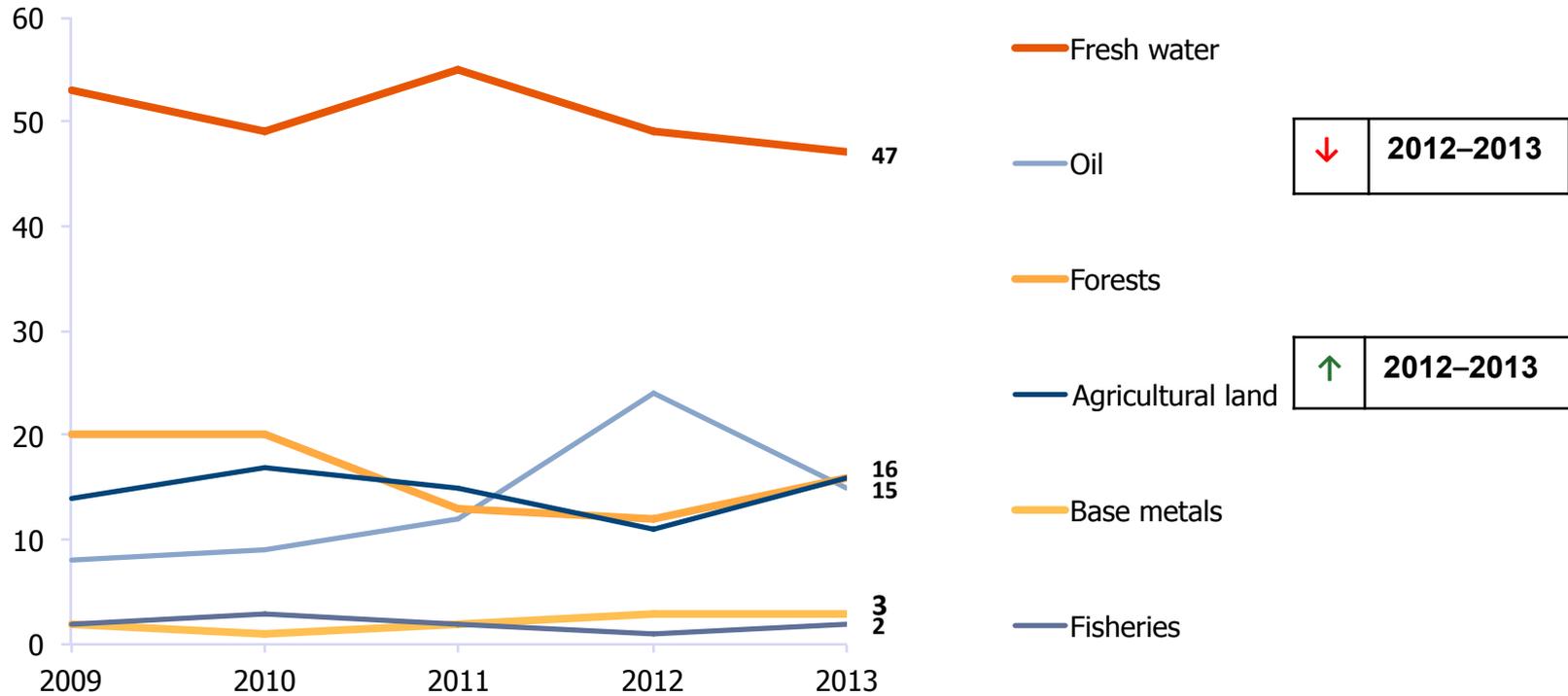
Key Findings

1. Challenging conditions for engaging on water
2. A relationship taken for granted
3. We are risk averse, yet unaware of the risk
4. Behavioral inertia requires new approaches

Context



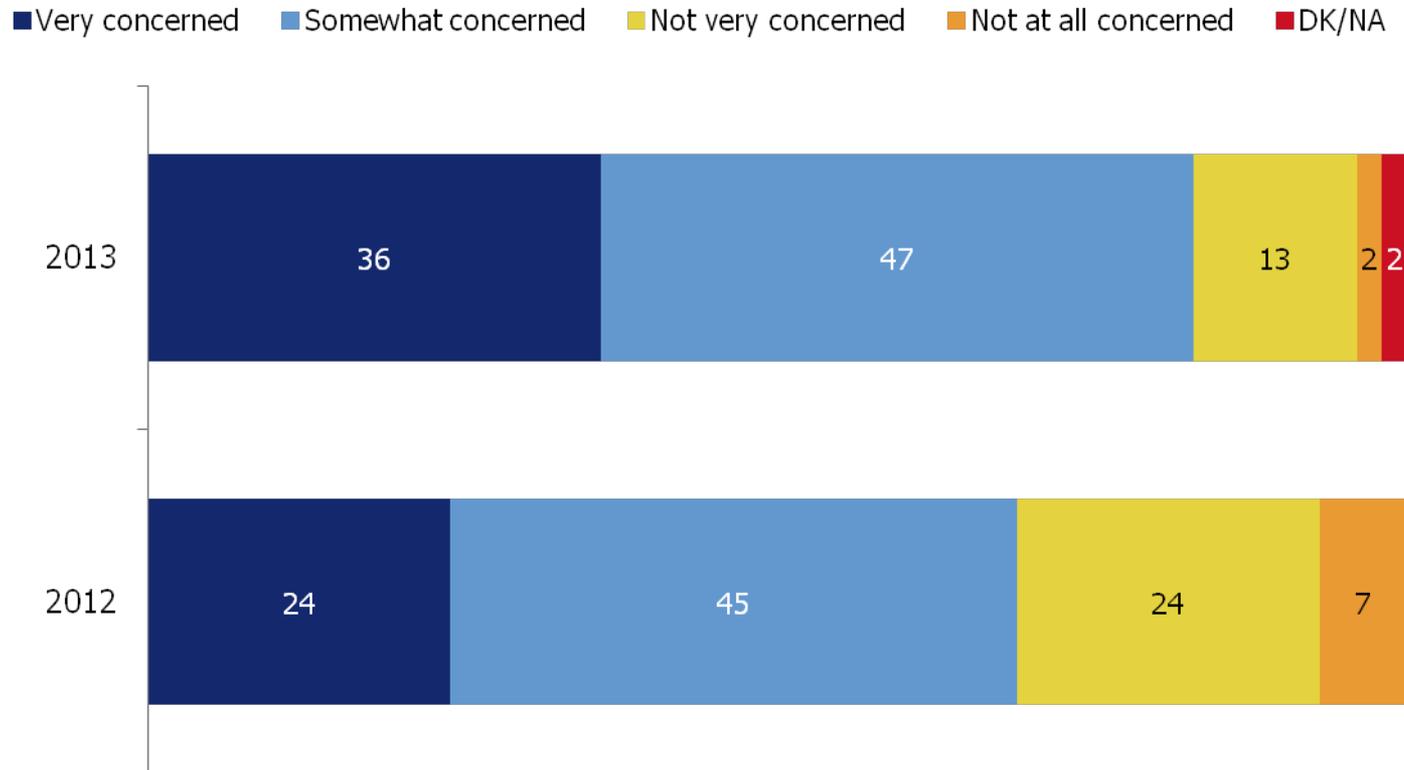
Although fresh water remains Canada's most important natural resource, there has been a slight decline since 2011



2013=n=2282; 2012 n=2428; 2011 n=2066; 2010 n=2022; 2009 n=2165

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

Over three-quarters of Canadians express concern about the water quality in lakes, rivers, and streams

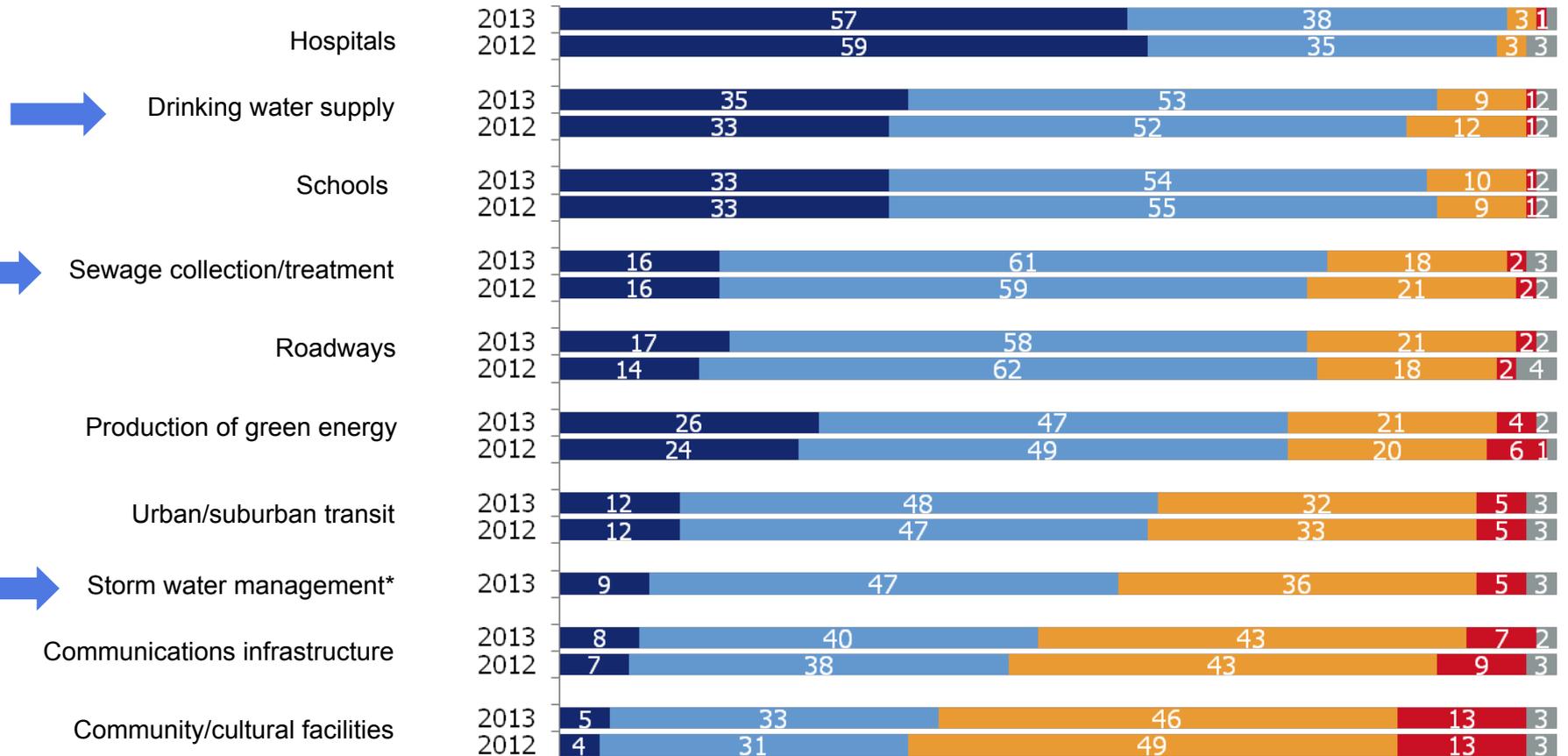


2013, n=2282

Below is a list of issues that you might be concerned about. For each, please indicate the degree to which you are concerned or not concerned. The quality of water in lakes, rivers and streams.

Canadians think drinking water supply is a high-priority area for government funding; storm water management is low on the agenda

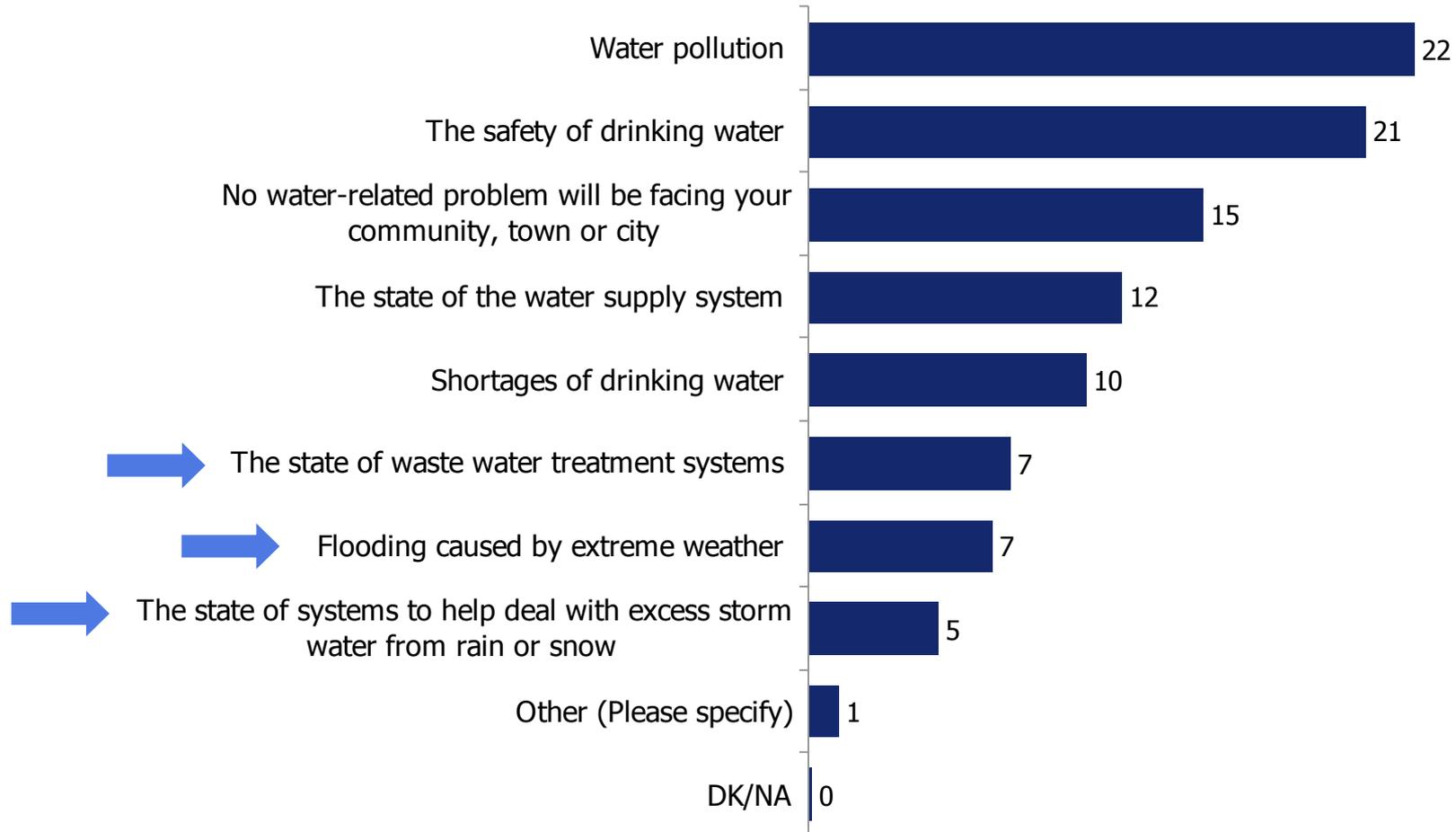
■ The highest priority ■ A high priority ■ A low priority ■ The lowest priority ■ DK/NA



2013 n=2282, 2012 n=2428. *New in 2013

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?

Water pollution and safety of drinking water are expected to be the greatest water-related issues ten years from now



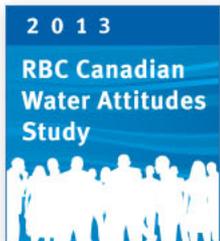
2013 n=2282

Ten years from now, which one of the following do you think will be the greatest water-related problem facing your community, town or city?

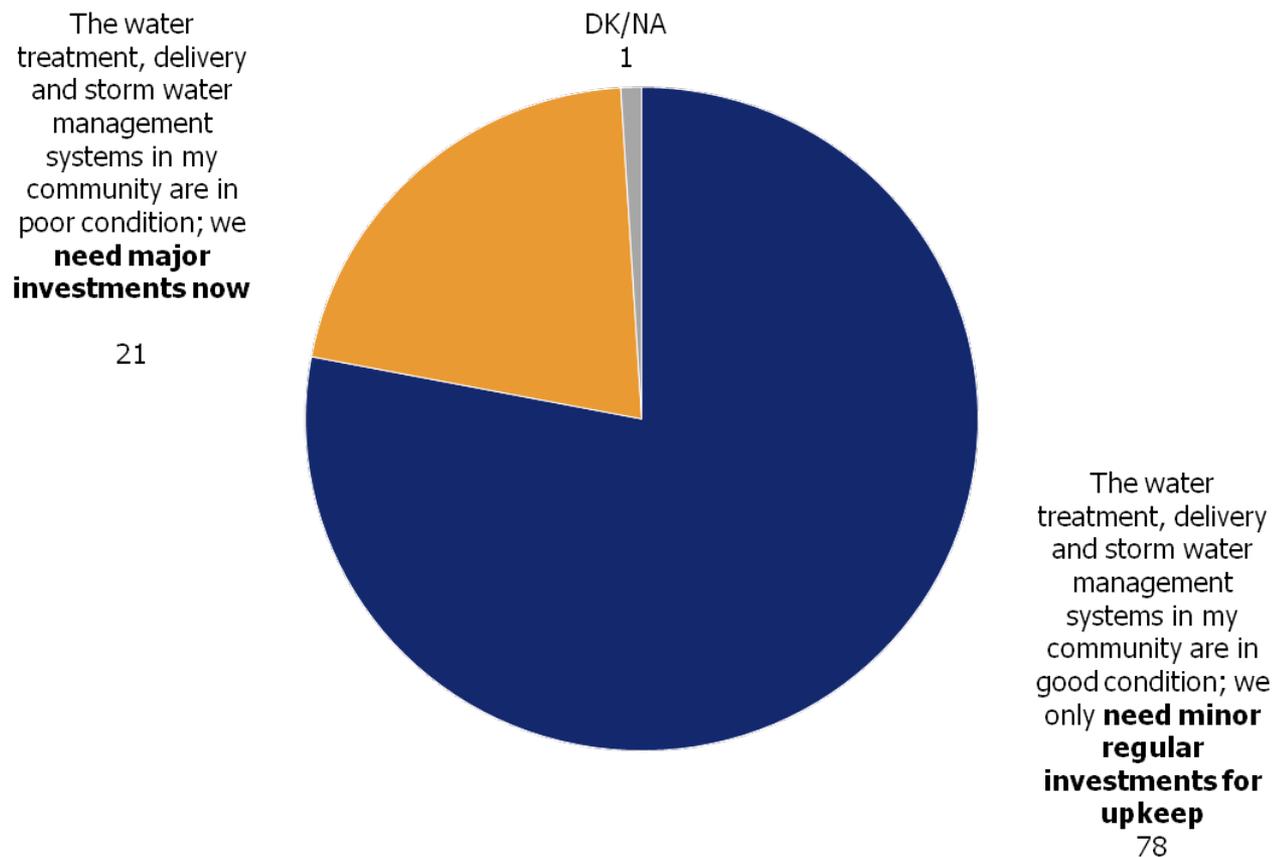
Summary

- A great deal of ongoing concern and appreciation for water
- Focus is largely on water quality, with limited engagement on infrastructure

Infrastructure



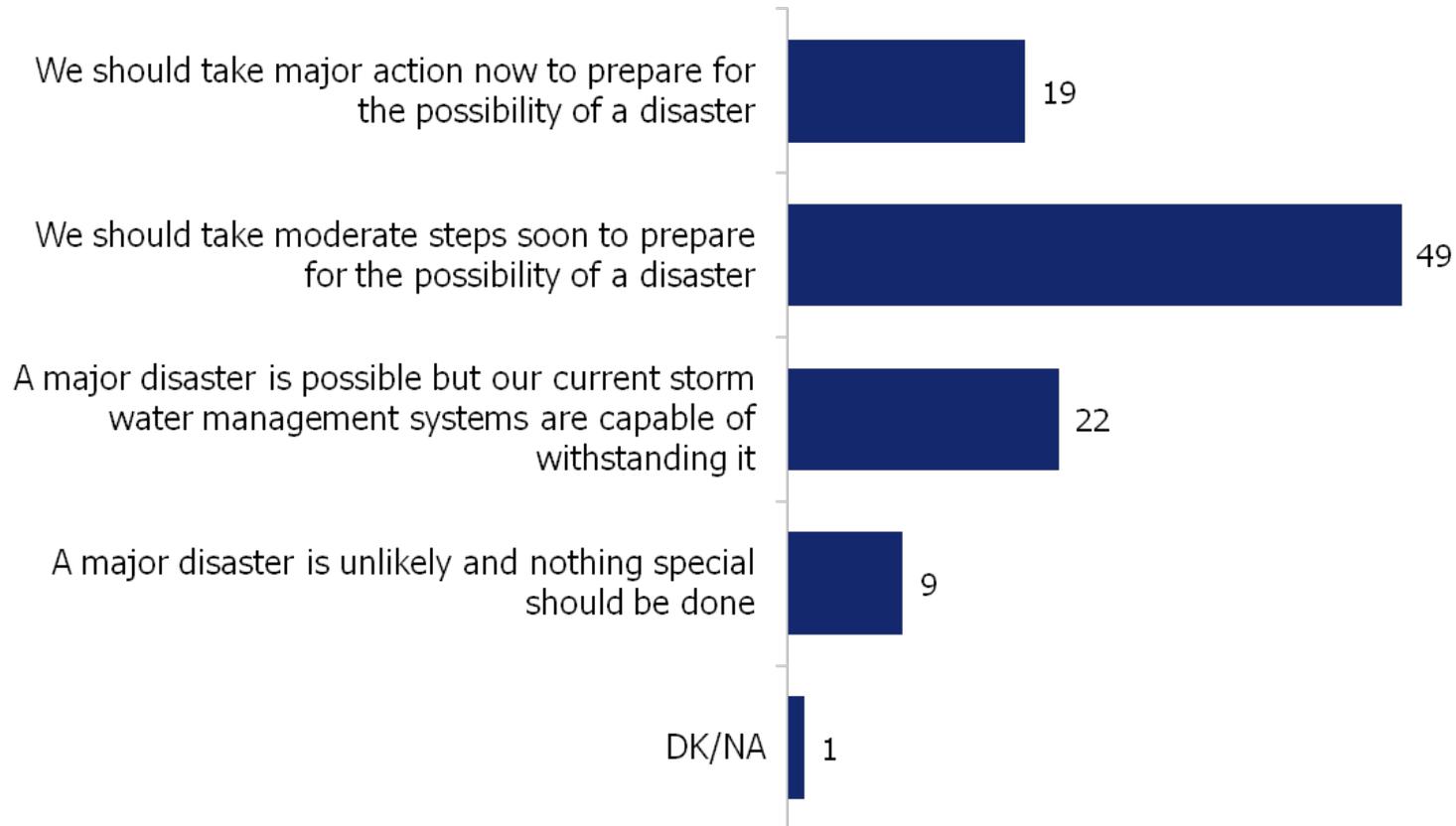
Canadians who use municipal water do not see a need for immediate investment in water treatment, delivery and storm water management systems



2013, n=1951

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

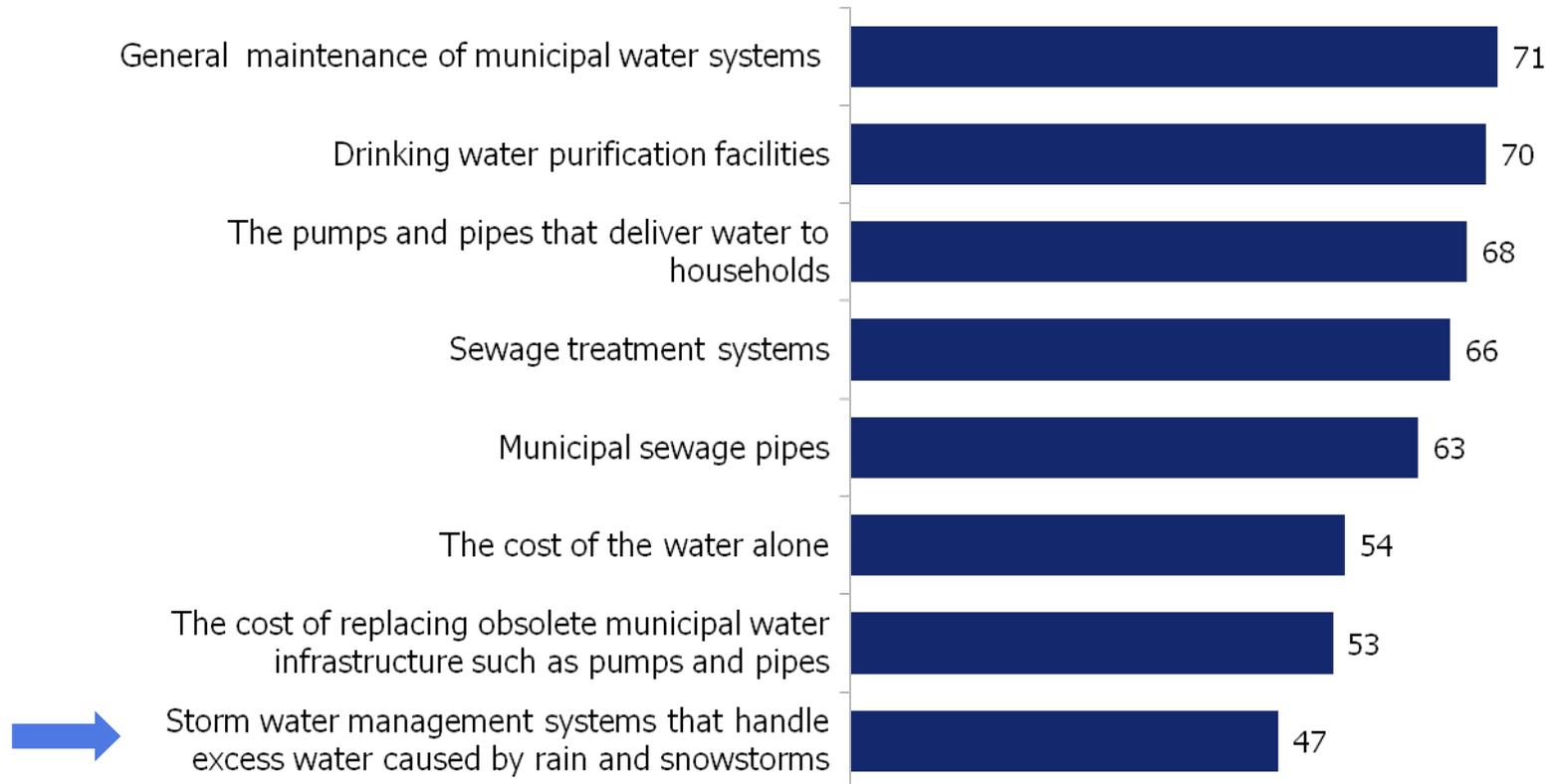
Seven in 10 Canadians believe in precautionary action to prepare for a disaster that could affect storm water management systems



2013 $n=2282$

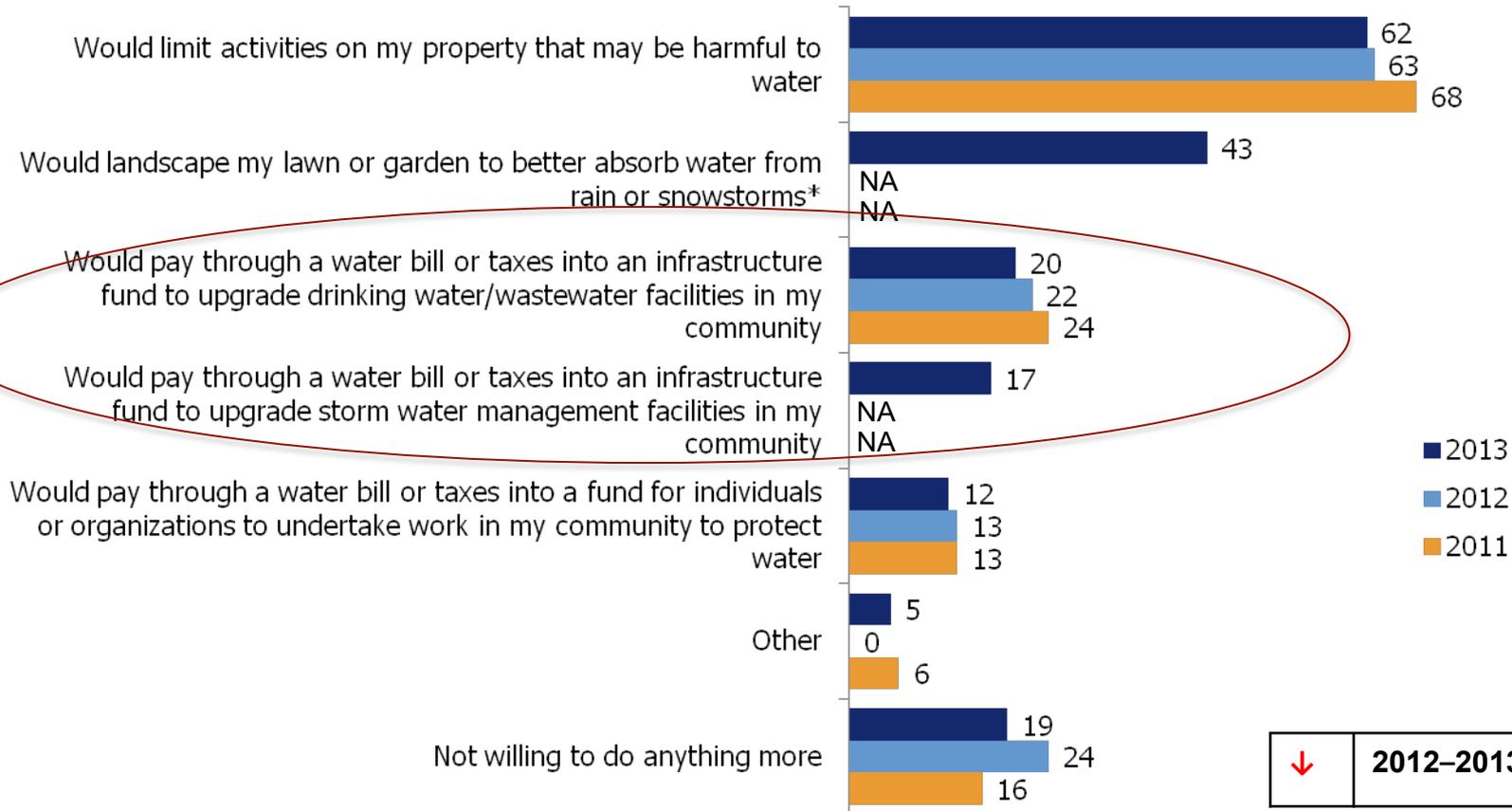
Major disasters like Hurricane Sandy can also cause flooding by overwhelming municipal storm water management systems. Which one of the following approaches do you think your community, town or city should take to prepare for the possibility of a major disaster affecting storm water management systems?

Fewer than half of Canadians believe that investments in storm water management systems are included in their water bills



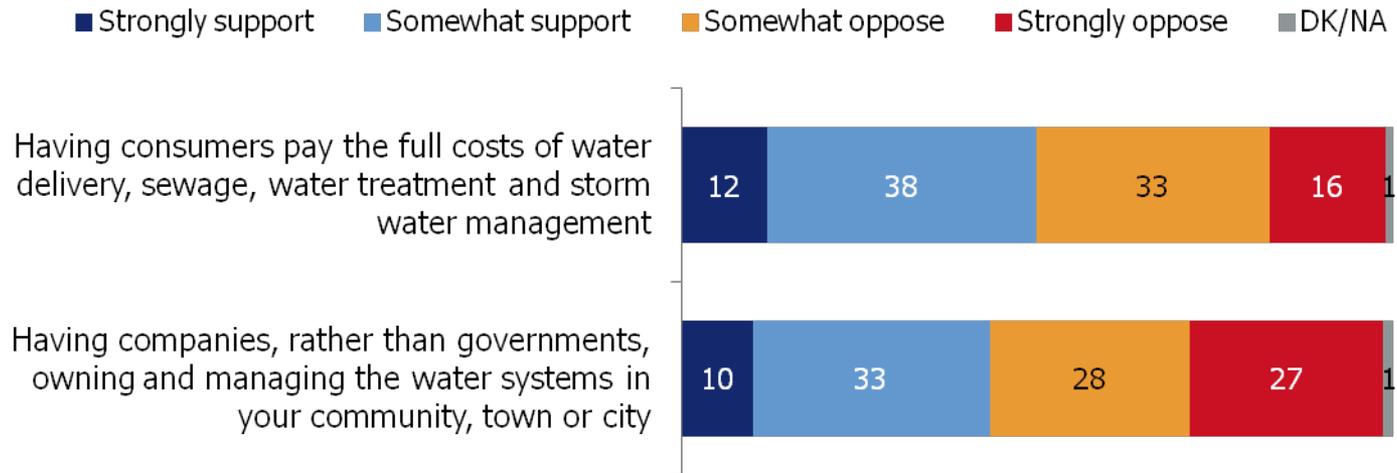
2013 n=1122

Limited support to pay more in taxes to an infrastructure fund



2013 n=2282, 2012 n=2428, 2011 n=2066 *New in 2013

Little support for full-cost pricing or privatization of water

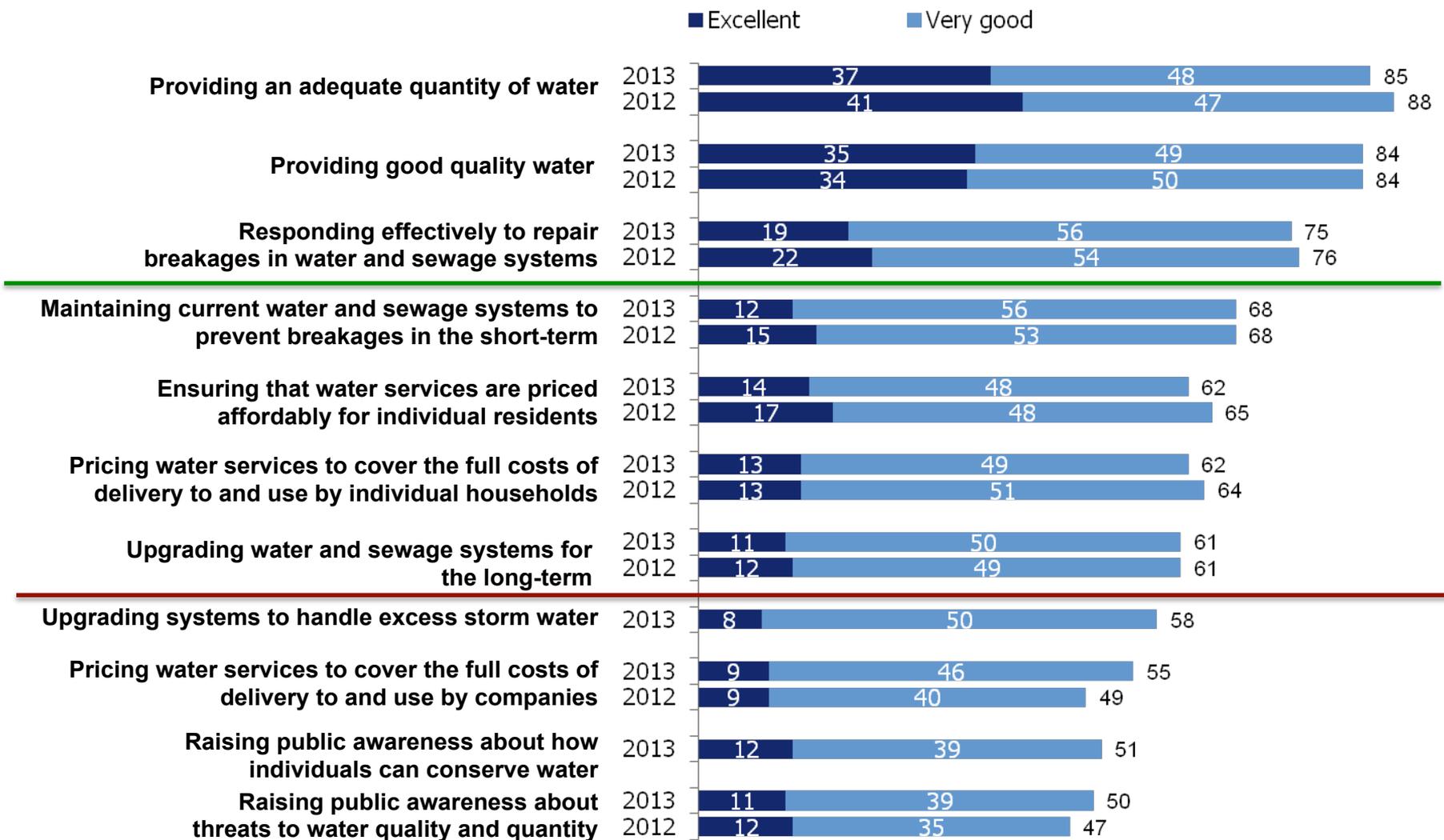


RBC13_Q37_support_water_management_Canada_1

2013 n=2282

18 Would you support or oppose each of the following?

Canadians are critical of their municipality's performance on upgrading systems and engaging the public

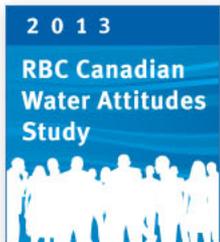


2013, n=1951

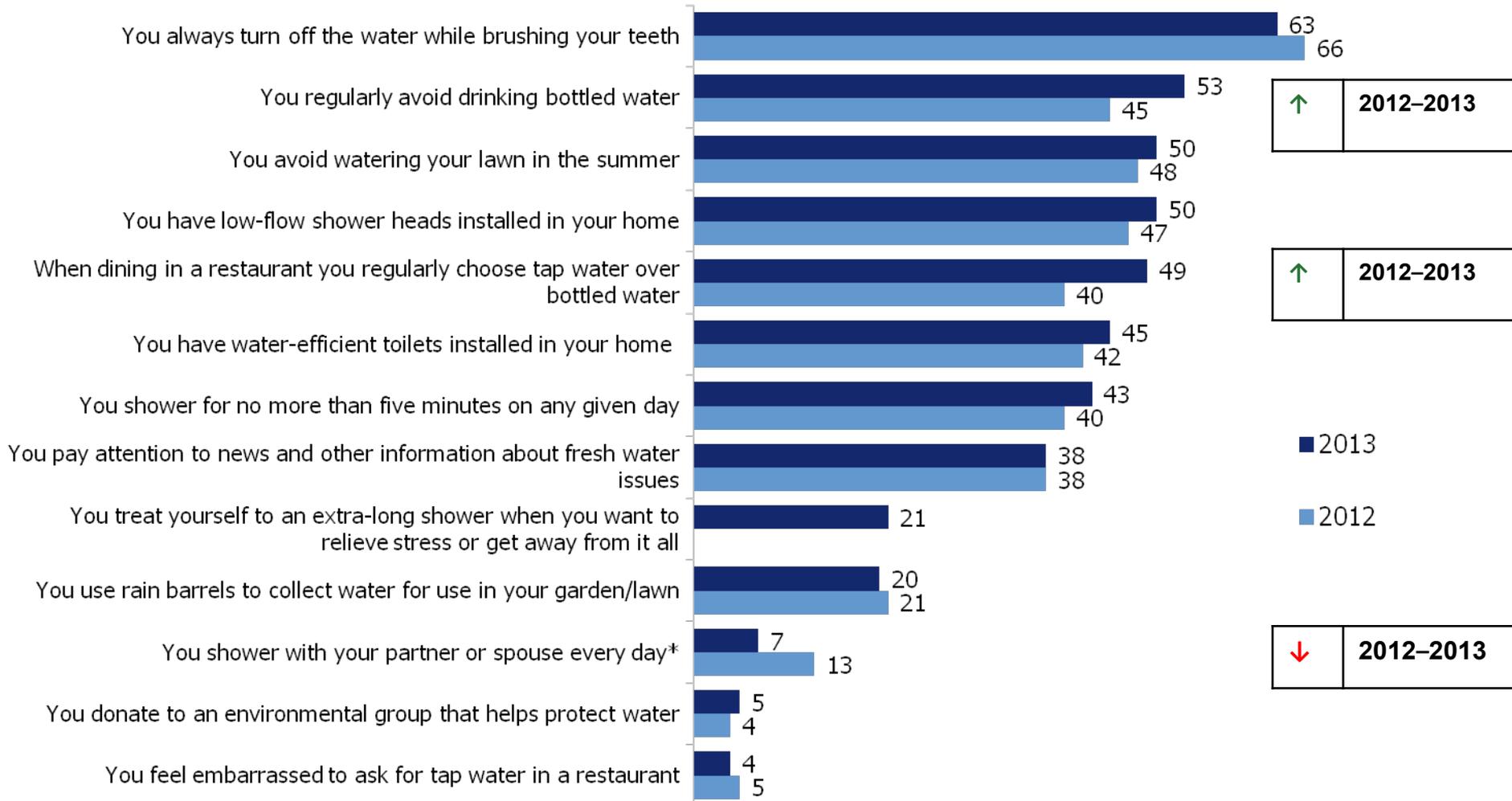
Summary

- Little appreciation for the current state of affairs regarding water systems management
- However, when push comes to shove, the precautionary principle kicks in
- A challenge regarding funding – who is responsible and who pays

Behaviour

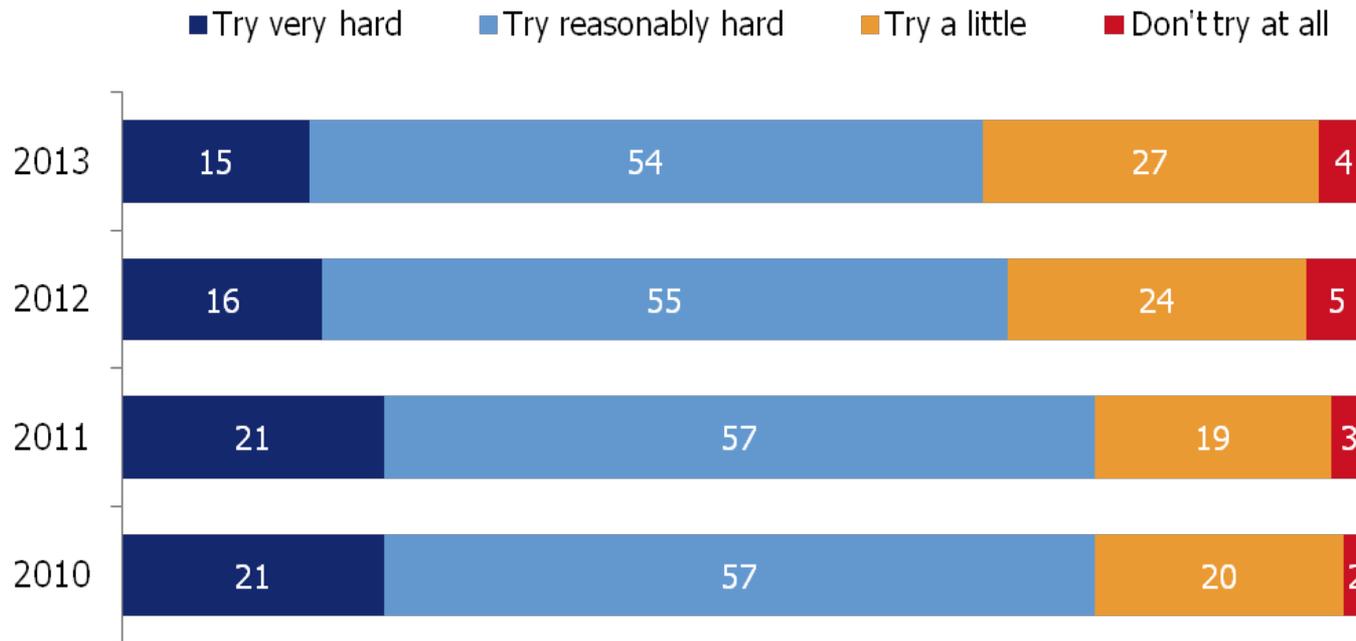


While many Canadians regularly engage in “water-friendly” behaviours, they are less likely to use rain barrels, or donate to environmental groups



2013 n=2282, 2012 n=2428

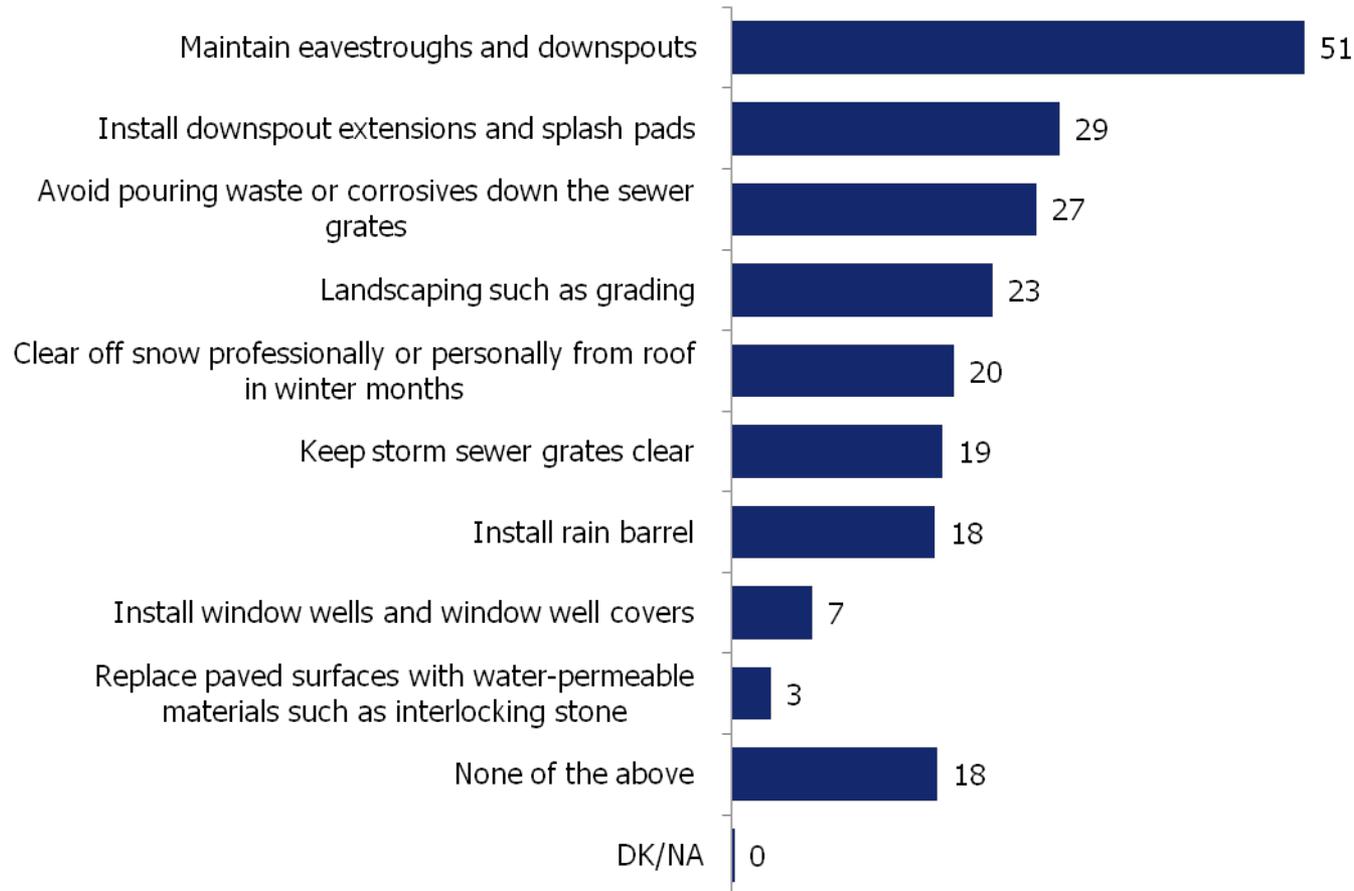
While a majority of Canadians report trying to conserve water, there has been a 9 point decline in percentage saying so



* 76% who pay for water try to conserve, compared to 59% who don't pay

2013 n=2282, 2012 n=2428, 2011 n=2066, 2010 n=2022

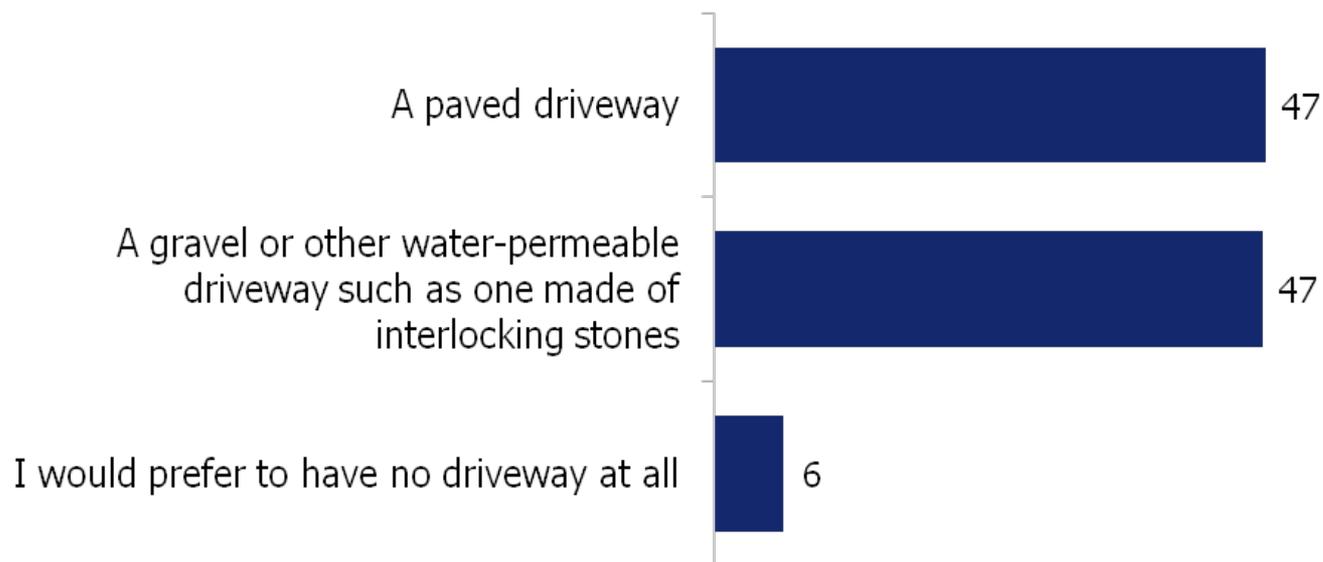
Top measures taken to prevent water damage outside of the home include maintaining eavestroughs and downspouts



2013 $n=1,554$

What are the top preventative measures you take or have taken to help prevent water damage OUTSIDE of your home? Please select up to three.

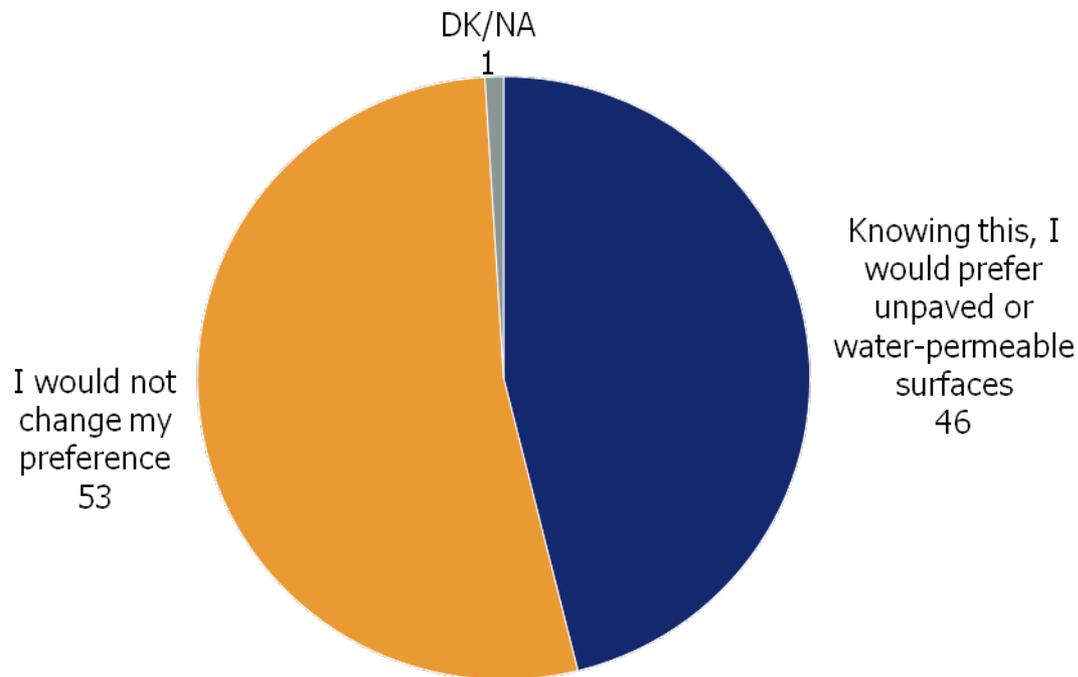
Canadians are split between preferring a paved driveway and a water-permeable driveway



2013 $n=2282$

25 Thinking again of the ideal home for you, which one of the following types of driveways would be most important for you to have?

Learning about benefits of unpaved surfaces leads to a shift in opinion among nearly half of those who prefer a paved driveway



2013 *n*=1122

If you knew that unpaved surfaces were the best for our water supply and treatment systems because they allow rainwater and melted snow to seep slowly into the ground, would that change your preference for these different types of front yards and/or driveways?

Summary

- Ongoing engagement from the public but little momentum
- Need new approaches to facilitate behaviour change

Moving Forward

- How can we connect with Canadians to help advance the “downstream” infrastructure agenda?
- What are the most effective levers for consumer-led change in the built and already-established urban environment?
- How can the CWAS best be used to influence decision makers and fiscal planners?
- What must policy do to future-proof urban environments from the impacts of more frequent heavy-precipitation events?
- What are the limits of regulatory influence on private property when it comes to water and infrastructure implications?