



Ipsos Reid Public Affairs

Report for:
METRO VANCOUVER

Drinking Water Survey

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EXECUTIVE SUMMARY

Drinking Water Behaviours

Tap water is clearly preferred over bottled water, although some barriers are preventing residents from drinking tap water exclusively. The survey points to a consistent preference for tap water over bottled water. For example, three-quarters of Metro Vancouver residents consume tap water as their main source of drinking water. Furthermore, the amount of tap water that residents drink in a typical day exceeds that of bottled water by a ratio of 3:1. However, while residents clearly prefer tap water, most still consume at least some bottled water each day, primarily out of convenience and availability. Overall, this indicates that although many residents already drink a great deal of tap water, increasing the availability of tap water (for example, more public drinking fountains) and reducing the availability of bottled water may help encourage them to drink even more tap water than they already do.

Cost is the primary reason for drinking tap water rather than bottled water. However, convenience, taste, the environment, and safety also play a role. These findings suggest that while financial considerations are clearly an important motivator to tap water drinkers, other factors would likely deter them from switching to bottled water even if cost were not an issue.

Taste and convenience motivate bottled water drinkers. Health is also a factor for some, pointing to some concerns about the safety of tap water. Addressing these concerns and educating people on the quality/treatment of Metro Vancouver's tap water may motivate some bottled water drinkers to switch to tap.

Half of tap water drinkers treat their tap water prior to drinking. The primary reason for filtering, boiling, or treating tap water prior to drinking is to remove impurities. Other reasons include to improve the taste, to remove chemicals, and to ensure safety. The fact that half of all tap water drinkers filter, boil, or treat their tap water prior to drinking suggests that even these residents have some concerns about the quality, cleanliness, and/or safety of the region's tap water. This further supports the suggestion that a public communications campaign educating people about Metro Vancouver's tap water may be of value.

Attitudes Towards Drinking Water

The majority of Metro Vancouver residents do not have any concerns about drinking tap water. When specifically asked, six-in-ten residents say they have no concerns about drinking tap water. Overall, this suggests that while some residents may prefer to err on the side of caution of drinking tap water (e.g., filtering, boiling, or treating tap water prior to drinking), they nonetheless feel confident in the water that is supplied. Of the concerns that are mentioned, contaminants and purity/cleanliness top the list. Again, addressing these concerns may be as simple as increased public communications regarding the quality, cleanliness, and safety of Metro Vancouver's drinking water.

Residents have more concerns about bottled water. One-third of residents voice no concerns about bottled water. While this is much lower than is seen for tap water, it nonetheless points to a pocket of residents who could still benefit from increased education around the problems associated with bottled water. Overall, the top bottled water concerns include bad for the environment, contaminants from the bottle, and cost. Messages that further reinforce these views will make intuitive sense to residents, although a full-blown communications campaign around these issues may not be necessary given that some residents have already internalized these concerns. However, very few residents point to concerns around lack of regulation, which might indicate an opportunity for increased public education on how the bottled water industry is regulated as compared to regulations governing tap water.

Consistent with their drinking water behaviours, Metro Vancouver residents' attitudes towards drinking water show a clear preference for tap over bottled water. The vast majority agree that “it is expensive to drink bottled water” and three-quarters also agree that “bottled water has a negative impact on the environment”. Furthermore, a similar proportion *disagrees* with the statement “tap water is fine for adults, but it’s better to give children bottled water”, while many also *disagree* that they “like the taste of bottled water better than tap water”. Overall, these findings point to a very favourable view of tap water over bottled water. That said, the survey suggests residents are less certain about the cleanliness and safety of tap water over bottled water, with fewer (although still the majority) agreeing that “tap water is cleaner and safer than bottled water because it must meet stricter safety regulations”. Again, this points to an opportunity for increased public education on the regulations governing bottled water and tap water.

Awareness and Attitudes Towards Metro Vancouver’s Drinking Water Supply

Residents are most likely to think Metro Vancouver gets its tap water from reservoirs/watersheds, although do not specify an exact name or location. This suggests that while residents have at least a basic understanding of where Metro Vancouver gets its tap water, they may not know the specifics of what this includes. This may be one topic for Metro Vancouver to include in its public communications campaign. In addition to growing awareness of the issue, this knowledge may also motivate residents to feel more confident in the region’s drinking water supply.

Perceptions of Metro Vancouver’s tap water are favourable. More than eight-in-ten residents rate the overall quality of Metro Vancouver’s tap water as “excellent” or “good”, indicating this is not a concern for most residents. Residents are also satisfied with the clarity, safety, smell, and taste of the region’s tap water.

Increased public education may encourage some residents to drink more tap water instead of bottled water. When specifically asked for things Metro Vancouver could do to encourage them to drink more tap water instead of bottled water, the number one suggestion is “provide more information”, indicating that residents have some questions about the region’s drinking water (while residents didn’t specifically state what information they would like, possible suggestions include the benefits of tap water, information on the source and/or treatment of Metro Vancouver’s tap water, quality, and safety). Some also suggest “advertise more for tap water”, pointing to further support for a public relations campaign promoting tap water and indicating that simply making this issue more top-of-mind may encourage some to increase their consumption of tap water.

Communication and Information Needs

Non-profit science, environmental, or health organizations are deemed the most trustworthy sources of information about drinking water; Metro Vancouver places second. Overall, nine-in-ten residents would trust information about drinking water that was provided by non-profit science, environmental, or health organizations, and a similar proportion feel this way about Metro Vancouver. The high level of trust residents have in Metro Vancouver is encouraging and indicates Metro Vancouver is in a good place to embark on its public communications campaign regarding drinking water. Feelings of trust might be further entrenched by partnering with non-profit science, environmental, or health organizations when communicating about drinking water.

Residents would also trust information coming from different levels of government (local municipal, provincial, and federal), although the degree of trust decreases at higher levels. While two-thirds of residents would trust information provided by the news media, there is a pocket of residents who would be sceptical of this information. Residents are even more critical of businesses as a source of information, perhaps reflecting questions around businesses’ agenda and motives for being involved in this type of communications activity. If possible, Metro Vancouver may want to avoid partnering with businesses as part of its communications campaign around drinking water.

Newspapers and television news top residents’ list of preferred communications channels. As such, any communications campaign about drinking water should include both of these mediums if possible. However, given other survey findings showing that information provided by the news media will likely be deemed less trustworthy than information coming from other sources, Metro Vancouver may want to ensure any such communications are accompanied by quotes or endorsements from non-profit science, environmental, or health organizations, your own staff, or representatives from different levels of government (including local municipal governments, the provincial government, and the federal government). Other preferred communication channels which could act as secondary sources of information include radio, brochures/publications, the Internet, and television programs.

While online information sources such as interactive websites, social networking sites, and blogs may attract a pocket of residents, the majority are unlikely to visit these types of resources to learn more about Metro Vancouver’s drinking water supply. On an unprompted basis, the Internet places as the fifth most preferred communications channel for Metro Vancouver to communicate with residents about the region’s drinking water supply. This suggests that while the Internet can play a role in informing the public about tap water (and bottled water), many residents would prefer a more traditional communications campaign relying on newspapers, television news, radio, and brochures/pamphlets.

This is consistent with other survey results showing limited interest in various online information sources including interactive websites, social networking sites, and blogs. Overall, just over half of residents are likely to visit an interactive website (although only two-in-ten are “very likely” to do so). Residents are even less likely to visit a social networking site or blog. The limited appeal of these offerings suggests this is not something Metro Vancouver should invest too heavily in.

Segmentation Analysis

There are four distinct segments of residents when it comes to attitudes towards drinking water. These include Tap-A-Holics, Bottle Lovers, Convenience Driven Mixers, and Tap Worriers. Each segment has its own needs and opportunities – rather than trying to be everything to all segments, Metro Vancouver should focus on the segments that will provide the greatest return on investment. A summary of the key characteristics of each segment can be found below.

- ◆ **Tap-A-Holics:** Making up 53% of the population, the Tap-A-Holics are defined by a strong preference for tap water over bottled water. While this segment represents the largest segment in the population, they should be considered a secondary target for Metro Vancouver as they already demonstrate the behaviours and attitudes Metro Vancouver wishes to encourage. Rather than focusing on changing behaviours and attitudes, the strategy here should be to maintain and support Tap-A-Holics’ current drinking water habits.
- ◆ **Bottle Lovers:** At the opposite end of the spectrum are the Bottle Lovers, which represent 13% of the population. Bottle Lovers almost exclusively drink bottled water. They present little to no potential for change and should thus be considered a tertiary target for Metro Vancouver.
- ◆ **Convenience Driven Mixers:** Members of this segment drink a combination of bottled water and tap water. While they demonstrate a slight preference for the taste of bottled water over tap, they are primarily motivated by convenience and tend to fall in between Tap-A-Holics and Bottle Lovers in their attitudes towards drinking

water. Although Convenience Driven Mixers are the smallest segment (12%), they nonetheless represent a primary target for Metro Vancouver because there is a good chance of increasing the amount of tap water they drink with the right information and messages.

- ◆ **Tap Worriers:** Representing 22% of the population, Tap Worriers are similar to Tap-A-Holics in that they primarily consume tap water. However, while tap water may be Tap Worriers' primary source of drinking water, they nonetheless have some concerns around the quality, cleanliness, safety, and taste of the water they are drinking. Along with Convenience Driven Mixers, Tap Worriers represent a primary target for Metro Vancouver. However, the strategy here will be slightly different - rather than having to convince Tap Worriers to drink more tap water (which they already do), the focus should be on locking Tap Worriers into their current drinking water habits.

INTRODUCTION

Objectives

Metro Vancouver has one of the largest water systems in North America and supplies high quality drinking water to a population of 2.1 million and growing. With Metro Vancouver's multi-step water treatment and monitoring program, buying bottled water is a personal choice, not a necessity. In order to better understand residents' drinking water behaviours and attitudes, Metro Vancouver commissioned Ipsos Reid to conduct a public opinion survey with the region's citizens. The insight gained from this research will ultimately help guide Metro Vancouver in the development of a relevant and impactful communications campaign aimed at encouraging residents to drink more tap water. Furthermore, establishing a baseline understanding in this area will also provide a benchmark to monitor the effectiveness of Metro Vancouver's efforts in encouraging residents to drink more tap water over time.

Specific research objectives included:

- ◆ Determine preferred type of drinking water (tap or bottled) and why;
- ◆ Assess what percentage of daily drinking water is tap water versus bottled water, as well as the reasons for occasionally drinking a type of water other than residents' preferred type;
- ◆ Determine if residents drink tap water straight from the tap or if they filter, boil, or treat it in some way prior to drinking (and if so, why);
- ◆ Understand concerns about drinking tap water and bottled water;
- ◆ Measure attitudes towards drinking water (both tap and bottled);
- ◆ Assess awareness of the source of Metro Vancouver's tap water;
- ◆ Gauge perceptions of Metro Vancouver's tap water, including overall quality, taste, safety, smell, and clarity;
- ◆ Learn what Metro Vancouver could do to encourage residents to drink more tap water instead of bottled water;
- ◆ Identify trustworthy sources of information about drinking water;
- ◆ Determine the best ways for Metro Vancouver to communicate with residents about the region's drinking water supply;
- ◆ Measure the likelihood of visiting a blog, social networking site, and website to learn more about Metro Vancouver's drinking water supply; and,
- ◆ Profile residents and group them into meaningful and targetable clusters using segmentation analysis.

Where appropriate, this year’s results have been tracked and compared to a previous survey conducted by Metro Vancouver in April 2007. Please note that while these comparisons provide some insight into how residents’ behaviours and attitudes have changed over the past year, they should be considered directional in nature only due to changes in question wording.

Methodology

In total, 800 telephone interviews were conducted with a randomly selected representative sample of Metro Vancouver residents aged 18 years or older. The sample of residents was drawn by postal code and respondents were asked in the beginning of the survey to identify the community in which they live to further validate residency. To ensure randomness within households, the “birthday method” of selecting respondents was used (i.e., asking to speak to the adult in the household who had most recently celebrated a birthday). All interviews were conducted between the dates of July 28 and August 10, 2008.

Overall results are accurate to ± 3.5 percentage points, nineteen times out of twenty. Quotas were set by region to understand if and how opinions vary across the different geographic areas of Metro Vancouver. A summary of the final number of interviews completed in each region, along with the associated margins of error, can be found in the table below. The final data were weighted to ensure that the age, gender, and regional distribution reflects that of the actual population in Metro Vancouver according to the 2006 Census data.

Region	Number of Completed Surveys	Margin of Error (19 times out of 20)
Vancouver/Burnaby/New Westminster	200	$\pm 6.9\%$
North Shore	200	$\pm 6.9\%$
Northeast	200	$\pm 6.9\%$
South of Fraser	200	$\pm 6.9\%$
Total (All Metro Vancouver)	800	$\pm 3.5\%$

**North Shore includes North Vancouver City, North Vancouver District, West Vancouver, Lions Bay, and Bowen Island.*

**Northeast includes Anmore, Belcarra, Coquitlam, Maple Ridge, Pitt Meadows, Port Coquitlam, and Port Moody.*

**South of Fraser includes Delta, Langley City, Langley Township, Richmond, Surrey, and White Rock.*

DETAILED FINDINGS

Drinking Water Behaviours

Type of Drinking Water Consumed Most Often

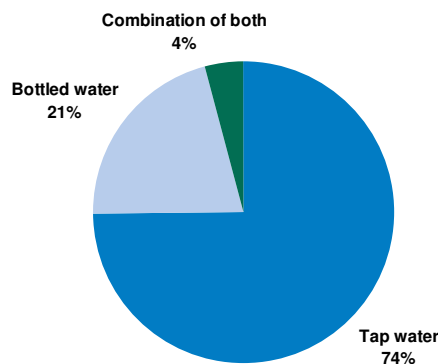
Most residents consume tap water as their main source of drinking water.

In total, three-quarters (74%) of Metro Vancouver residents consume tap water as their main source of drinking water. Only 21% usually opt for bottled water, while another 4% volunteer that they drink a combination of both. Overall, these results point to a clear preference for tap water over bottled water.

While not directly comparable to previous surveys due to differences in question wording, directional evidence suggests the incidence of drinking tap water has not significantly changed from 2007 when 75% of residents said they primarily consumed tap water in their place of residence.

Type of Drinking Water Consumed Most Often

Q2. What type of drinking water do you personally consume most often? Please think about all the water that you drink in a typical day, whether that be at home, at work, or anywhere else.



Base: All respondents (n=800)

Further analysis of the data shows that the incidence of drinking tap water varies by key demographic characteristics. Overall, residents who are the most likely to drink tap water include:

- ◆ Residents of Vancouver/Burnaby/New Westminster or the North Shore (includes 79% and 76%, respectively, compared to a low of 66% among those living in the Northeast);
- ◆ Those who are 55 years of age or older (82%, compared to 65% of 18 to 34 year olds);
- ◆ Those who have lived in Metro Vancouver for 41 or more years (85%, compared to 69% of those who have lived in the area for 20 years or less and 76% of those who have lived here for 21 to 40 years); and,
- ◆ Those with annual household incomes of less than \$60,000 (81%, compared to 63% of those earning \$120,000 or more).

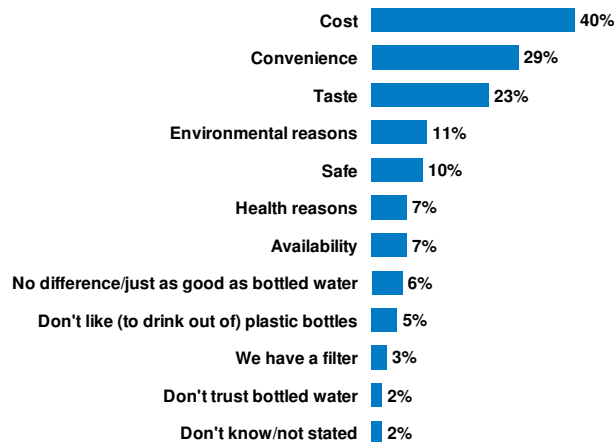
Reasons for Drinking Tap Water

Cost is the primary reason for drinking tap water rather than bottled water. Convenience, taste, the environment, and safety also play a role.

Among the 74% of respondents who primarily consume tap water, four-in-ten (40%) attribute this to “cost”. Other factors that play a role in the decision to drink tap water over bottled water include “convenience” (29%), “taste” (23%), “environmental reasons” (11%), and “safe” (10%). These findings suggest that while financial considerations are clearly an important motivator to tap water drinkers, other factors would likely deter them from switching to bottled water even if cost were not an issue.

Reasons for Drinking Tap Water

Q3. What is the main reason why you usually drink tap water over bottled water? Any other reasons?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: Usually drink tap water (n=607)

Key demographic differences include:

- ◆ Cost: mentioned more often by those under the age of 55 (includes 47% of 18 to 34 year olds and 45% of 35 to 54 year olds, compared to 29% of those aged 55 or older) and university graduates (46%, compared to 30% of those with a high school education or less).
- ◆ Convenience: mentioned more often by those aged 18 to 34 (36%, compared to 22% of those 55 years of age or older).
- ◆ Taste: mentioned more often by those living on the North Shore (32%, compared to a low of 21% among South of Fraser residents) and those aged 55 or older (31%, compared to 18% of 18 to 34 year olds).
- ◆ Environmental reasons: mentioned more often by those aged 35 to 54 (14%, compared to 6% of those aged 55 or older) and those with a higher level of formal education (includes 13% of those with at least some postsecondary education and 13% of university graduates, compared to 5% of those with a high school education or less).
- ◆ Safe: mentioned more often by those aged 55 or older (14%, compared to 4% of those aged 18 to 34).

Reasons for Drinking Bottled Water

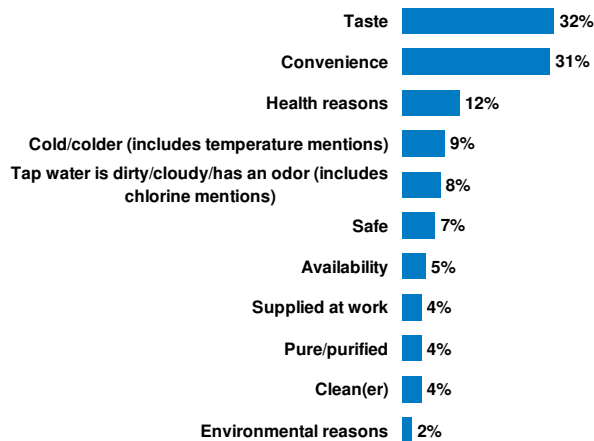
Taste and convenience motivate bottled water drinkers. Health is also a factor for some.

Among the 21% of respondents who usually drink bottled water, 32% attribute this to “taste” and 31% mention “convenience”. Another 12% of these respondents say they usually drink bottled water over tap water due to “health reasons”, pointing to some concerns about the safety of tap water. Addressing these concerns and educating people on the quality/treatment of Metro Vancouver’s tap water may motivate some bottled water drinkers to switch to tap.

While not directly comparable to the 2007 survey, directional evidence suggests that bottled water drinkers put more emphasis on taste this year than in the past (in 2007, only 13% said they drank bottled water over tap water because it “tastes better”). Rather, the primary reason for drinking bottled water in 2007 was “convenience/portability” (35%), followed by “safer than tap water” (17%). Another 12% said it was “available at work”.

Reasons for Drinking Bottled Water

Q4. What is the main reason why you usually drink bottled water over tap water? Any other reasons?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: Usually drink bottled water (n=162)

Key demographic differences include:

- ◆ Taste: mentioned more often by those born in Canada (42%, compared to 14% of those born elsewhere).
- ◆ Health reasons: mentioned more often by those living in the Northeast (17%, compared to a low of 4% among South of Fraser residents). While not significantly different due to small sample sizes, directional evidence suggests health reasons are also more of a motivator for those born outside of Canada (21% versus 7% of those born in Canada) and those with mother tongue other than English (19% versus 9% of those whose first language was English).

Percentage of Tap Water Versus Bottled Water

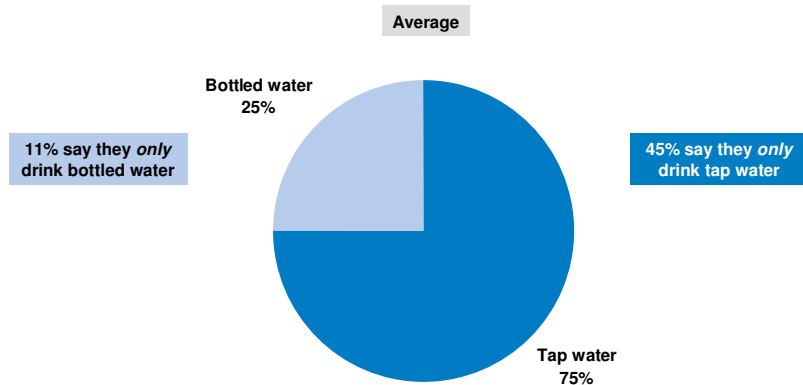
In a typical day, Metro Vancouver residents drink both tap water and bottled water, although the amount of tap water exceeds that of bottled water by a ratio of 3:1.

Metro Vancouver residents' preference for tap water is clearly demonstrated by the amount of tap water and bottled water they drink in a typical day. On average, approximately 75% of the water that residents drink each day is tap water while just 25% is bottled water. These results indicate that while Metro Vancouver residents drink more tap water than bottled water, there are some barriers preventing them from drinking tap water exclusively (discussed in more detail later in the report).

Closer analysis of the data shows that 45% of residents *only* drink tap water; among those who consume tap water as their primary source of drinking water, this rises to 60%. In comparison, a total of 11% of residents *only* drink bottled water; among those who consume bottled water as their primary source of drinking water, this rises to 49%.

Percentage of Tap Water Versus Bottled Water

Q5. In a typical day, approximately what percentage of the water you drink is ...? And what percentage is...?



Base: All respondents (n=800)

Residents who are the most likely to only drink tap water include those:

- ◆ Living on the North Shore (50%, compared to a low of 38% in the Northeast);
- ◆ Aged 55 or older (60%, compared to 31% of those aged 18 to 34 and 44% of those aged 35 to 54);
- ◆ Who have lived in Metro Vancouver for 41 or more years (61%, compared to 48% of those who have lived in the area for 21 to 40 years and to 34% among those who have lived in the area for 20 year or less); and,
- ◆ With annual household incomes of less than \$60,000 (55%, compared to 38% of those earning \$60,000 to less than \$120,000 and 37% of those earning \$120,000 or more).

Residents who are the most likely to be exclusive bottled water drinkers include those:

- ◆ Living South of Fraser or in the Northeast (14% and 13%, respectively, compared to a low of 7% among those in Vancouver/Burnaby/New Westminster);
- ◆ Aged 18 to 34 (15%, compared to 6% of those aged 55 or older); and,
- ◆ Who have lived in Metro Vancouver for 40 years or less (12%, compared to 4% of those who have lived in the area for more than 40 years).

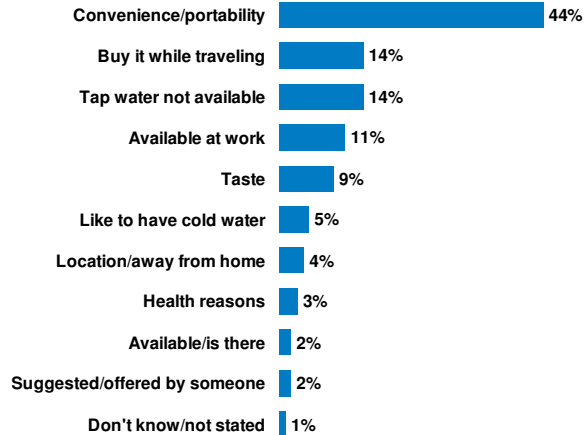
Reasons Why Tap Water Drinkers Occasionally Drink Bottled Water

Convenience/portability and availability are the primary reasons tap water drinkers will occasionally drink bottled water.

Six-in-ten (60%) of those who consume tap water as their primary source of drinking water drink tap water exclusively, which means that 40% of these residents drink at least some bottled water in a typical day. Why? Nearly half (44%) attribute this to the “convenience/portability” of bottled water. Availability also plays a role, with related mentions including “buy it while traveling” (14%), “tap water is not available” (14%) and “available at work” (11%). Overall, these findings suggest tap water drinkers would drink even more tap water than they already do if it were more convenient and available at more locations. At the same time, efforts to reduce the availability of bottled water may also have an impact.

Reasons Why Tap Water Drinkers Occasionally Drink Bottled Water

Q6. What is the main reason why you sometimes drink bottled water instead of tap water? Any other reasons?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: Usually drink tap water but also sometimes drink bottled water (n=212)

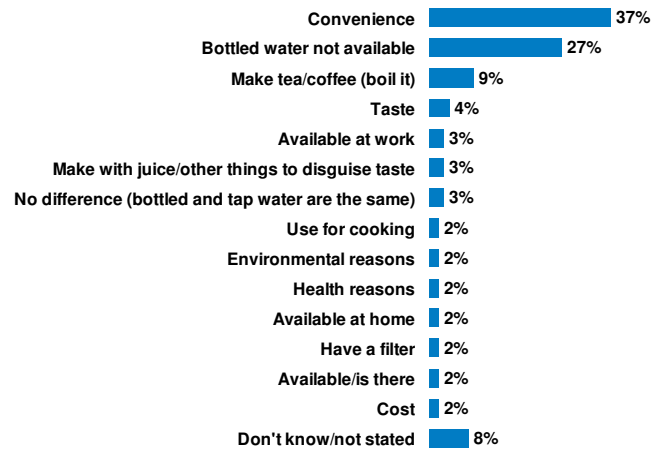
Reasons Why Bottled Water Drinkers Occasionally Drink Tap Water

Convenience and availability are also the primary reasons bottled water drinkers will occasionally drink tap water.

Among those who consume bottled water as their primary source of drinking water, half (49%) drink bottled water exclusively while the remaining 51% drink at least some tap water in a typical day. When asked why they will occasionally drink tap water instead of bottled water, 37% of these residents point to “convenience”. Another 27% say “bottled water is not available”.

Reasons Why Bottled Water Drinkers Occasionally Drink Tap Water

Q7. What is the main reason why you sometimes drink tap water instead of bottled water? Any other reasons?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: Usually drink bottled water but also sometimes drink tap water (n=88*)

*Caution small sample size, interpret with caution.

Treatment of Tap Water

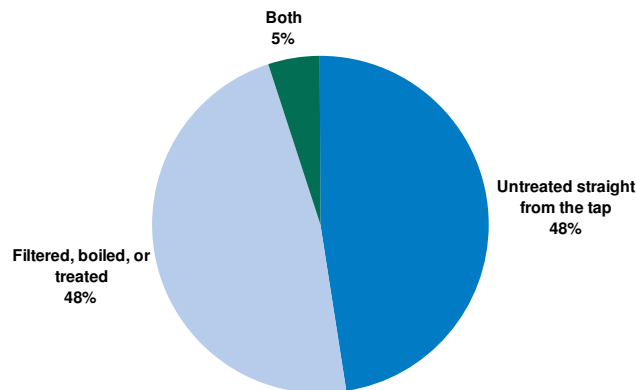
Half of tap water drinkers treat their tap water prior to drinking.

Tap water drinkers (defined as those who consume at least some tap water in a typical day) are divided as to whether or not they treat their tap water prior to drinking. In total, 48% drink tap water “untreated straight from the tap” while 48% “filter, boil, or treat” it prior to drinking. The fact that half of tap water drinkers treat their tap water suggests that even these residents have some concerns about the quality and/or safety of the region’s tap water. This further supports the suggestion that a public communications campaign educating people about Metro Vancouver’s tap water may be of value.

Comparisons to the 2007 survey suggest residents’ treatment of tap water has not significantly changed over the past year (in 2007, 49% of tap water drinkers drank water untreated straight from the tap while 44% said they filtered or treated it prior to drinking).

Treatment of Tap Water

Q8. When drinking tap water, do you usually drink it straight from the tap or do you usually filter, boil, or treat it in some way?



Base: Tap water drinkers (e.g., at least 1% of the water they drink in a typical day is tap water) (n=716)

- ◆ Women are more likely than men to filter, boil, or treat their tap water prior to drinking (53% versus 42%, respectively).
- ◆ Perceptions of the overall quality of the region’s tap water also influences whether or not it is treated prior to drinking. While 44% of those who rate the quality of the region’s tap water as excellent or good treat their tap water prior to drinking, this rises to 75% among those providing a fair, poor, or very poor rating.

Reasons for Treating Tap Water

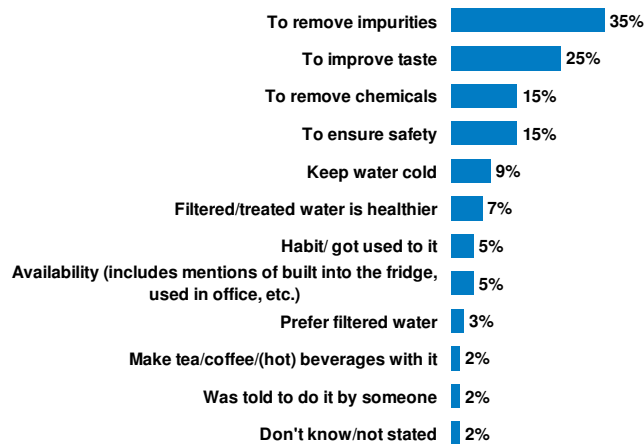
The number one reason for filtering, boiling, or treating tap water prior to drinking is to remove impurities.

Among those who filter, boil, or treat their tap water prior to drinking, just over one-third (35%) do this “to remove impurities”. Other reasons for treating tap water include “to improve taste” (25%), “to remove chemicals” (15%), and “to ensure safety” (15%), among others.

In 2007, the top three reasons for filtering or treating tap water were “to remove impurities” (23%), “to enhance safety” (22%), and “to improve taste” (22%). Another 13% mentioned “to remove chemicals”. While these reasons are similar to what is reported this year, directional evidence suggests concerns about impurities have increased over the past year while concerns about safety have declined slightly.

Reasons For Treating Tap Water

Q9. Why do you usually filter, boil, or treat tap water in some way before drinking it? Any other reasons?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: Filter, boil, or treat tap water before drinking (n=332)

Key demographic differences include:

- ◆ To remove impurities: mentioned more often by those earning less than \$60,000 (45%, compared to a low of 28% among those earning \$60,000 to less than \$120,000).
- ◆ To improve taste: mentioned more often by women (31%, compared to 16% of men), those who have lived in Metro Vancouver for 21 to 40 years (37%, compared to 19% of those who have lived in the area for 20 years or less and 15% of those who have lived in the area for more than 40 years), and those born in Canada (31%, compared to 14% of those born elsewhere).
- ◆ To ensure safety: mentioned more often by those who have lived in Metro Vancouver for 20 years or less (22%, compared to 10% of those who have lived here for 21 to 40 years and 7% of those who have lived here for 41 or more years), those born outside of Canada (27%, compared to 7% of those born in Canada), and those whose mother tongue is a language other than English (29%, compared to 7% of those who first learned to speak English). The increased focus on safety among these residents may be because they have had fewer opportunities to become familiar with Metro Vancouver's drinking water supply and treatment.

Attitudes Towards Drinking Water

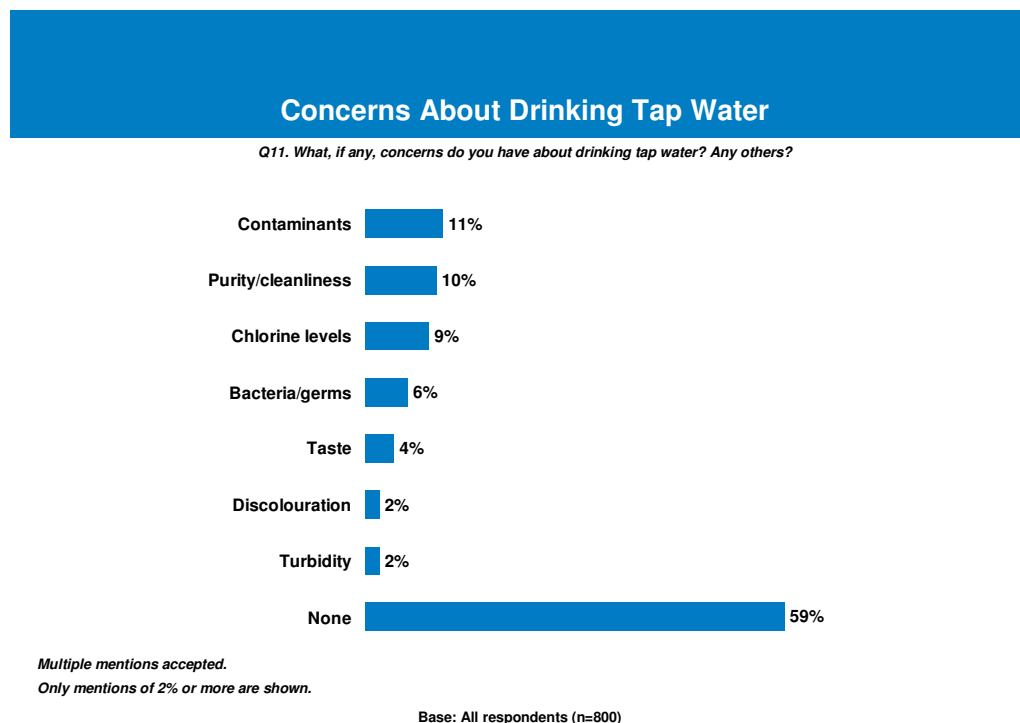
Concerns About Drinking Tap Water

The majority of Metro Vancouver residents do not have any concerns about drinking tap water.

When asked what, if any, concerns they have about drinking tap water, six-in-ten (59%) residents say “none”, indicating the quality of the region’s drinking water is not something many residents spend a lot of time worrying about.

Of the concerns that are mentioned, “contaminants” and “purity/cleanliness” top the list, mentioned by 11% and 10% of residents, respectively. These concerns are consistent with other survey results showing that the number one reason for filtering, boiling, or treating tap water prior to drinking is “to remove impurities”. Again, addressing these concerns may be as simple as increased public communications regarding the quality, cleanliness, and safety of Metro Vancouver’s drinking water.

In 2007, 55% of residents said they had no specific concerns about the drinking water that comes into their home. A total of 16% mentioned “purity/cleanliness” while 10% pointed to “contaminants”.



The survey shows that tap water drinkers have much fewer concerns than bottled water drinkers about drinking tap water. Specifically, 68% of tap water drinkers have no specific concerns about drinking tap water, compared to only 33% of bottled water drinkers. Rather, bottled water drinkers are much more likely to be concerned about a number of different things, including “contaminants” (17% versus 8%), “purity/cleanliness” (19% versus 7%), “chlorine levels” (14% versus 8%), and “bacteria/germs” (11% versus 4%), among others. It is interesting to note that bottled water drinkers’ concerns about tap water do not align with the reasons why they prefer bottled water over tap water (taste, convenience). Overall, this suggests that while bottled water drinkers can identify some concerns about tap water when specifically asked, these are not their primary motivators for drinking bottled water.

Concerns About Drinking Tap Water – Tap Water Drinkers Versus Bottled Water Drinkers

Q11. What, if any, concerns do you have about drinking tap water? Any others?

	Total (n=800)	Tap Water Drinkers (n=607)	Bottled Water Drinkers (n=162)
Contaminants	11%	8%	17%
Purity/cleanliness	10%	7%	19%
Chlorine levels	9%	8%	14%
Bacteria/germs	6%	4%	11%
Taste	4%	3%	8%
Discolouration	2%	2%	5%
Turbidity	2%	2%	1%
None	59%	68%	33%

 = Significant difference

Other demographic differences include:

- ◆ Contaminants: mentioned more often by those aged 18 to 34 (17%, compared to 9% of 35 to 54 year olds and 7% of those aged 55 or older).
- ◆ Purity/cleanliness: mentioned more often by those who have lived in Metro Vancouver for 20 years or less (12%, compared to 5% of those who have lived in the area for more than 40 years), university graduates (13%, compared to 5% of those with a high school education or less), and those whose mother tongue is a language other than English (15%, compared to 8% of those who first learned English).

Concerns About Drinking Bottled Water

Metro Vancouver residents have more concerns about bottled water, including bad for the environment, bottle contaminants, and cost.

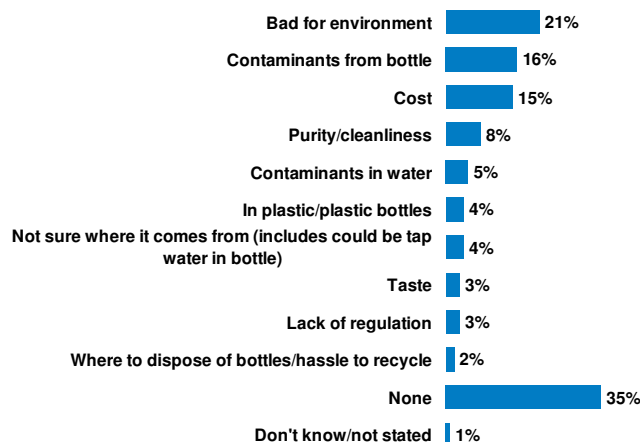
While 59% of residents have no concerns about drinking tap water, only 35% feel this way about bottled water. Although residents clearly have more concerns about bottled water than tap, the survey nonetheless points to a pocket of residents who could still benefit from increased public education on the problems associated with bottled water.

The environmental impact of bottled water has garnered a lot of media attention in recent years and the survey results suggest residents have picked up on this, with 21% saying they are concerned that bottled water is “bad for environment”. Other bottled water concerns include “contaminants from bottle” (16%, another hot media topic lately) and “cost” (15%). Messages that further reinforce these views will make intuitive sense to residents, although a full-blown communications campaign around these issues may not be necessary given that some residents have already internalized these concerns.

However, on an unprompted basis, only 3% of residents mention “lack of regulation”, which might point to an opportunity for increased public education on how the bottled water industry is regulated as compared to regulations governing tap water.

Concerns About Drinking Bottled Water

Q12. What, if any, concerns do you have about drinking bottled water? Any others?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: All respondents (n=800)

Bottled water drinkers have much fewer concerns than tap water drinkers about drinking bottled water. Specifically, 53% of bottled water drinkers say they have no specific concerns about drinking bottled water, compared to only 29% of tap water drinkers. Rather, tap water drinkers are much more likely to be concerned about things such as “bad for environment” (24% versus 10%) and cost (18% versus 4%). Cost was also the main reason why tap water drinkers prefer tap water over bottled water; while the environment also plays a role in this preference, it comes behind other factors such as convenience and taste, indicating that while the environment is clearly a concern associated with bottled water, it is not the primary reason why tap water drinkers prefer tap water.

Concerns About Drinking Bottled Water – Tap Water Drinkers Versus Bottled Water Drinkers

Q12. What, if any, concerns do you have about drinking bottled water? Any others?

	Total (n=800)	Tap Water Drinkers (n=607)	Bottled Water Drinkers (n=162)
Bad for environment	21%	24%	10%
Contaminants from bottle	16%	17%	15%
Cost	15%	18%	4%
Purity/cleanliness	8%	8%	8%
Contaminants in water	5%	6%	3%
In plastic/plastic bottles	4%	5%	3%
Not sure where it comes from (includes could be tap water in bottle)	4%	4%	3%
Taste	3%	3%	1%
Lack of regulation	3%	3%	<1%
Where to dispose of bottles/hassle to recycle	2%	3%	1%
None	35%	29%	53%
Don't know/not stated	1%	1%	0%

 = Significant difference

Other demographic differences include:

- ◆ Bad for environment: mentioned more often by those living in Vancouver/Burnaby/New Westminister or the North Shore (25% and 25%, compared to 16% of South of Fraser residents), university graduates (28%, compared to 19% of those with some postsecondary education and 11% of those with a high school education or less), and those earning at least \$60,000 (26% of those earning \$60,000 to less than \$120,000 and 29% of those earning \$120,000 or more, compared to 13% of those earning less than \$60,000).
- ◆ Contaminants from bottle: mentioned more often by women (20%, compared to 12% of men).
- ◆ Cost: mentioned more often by those born in Canada (17%, compared to 10% of those born elsewhere).

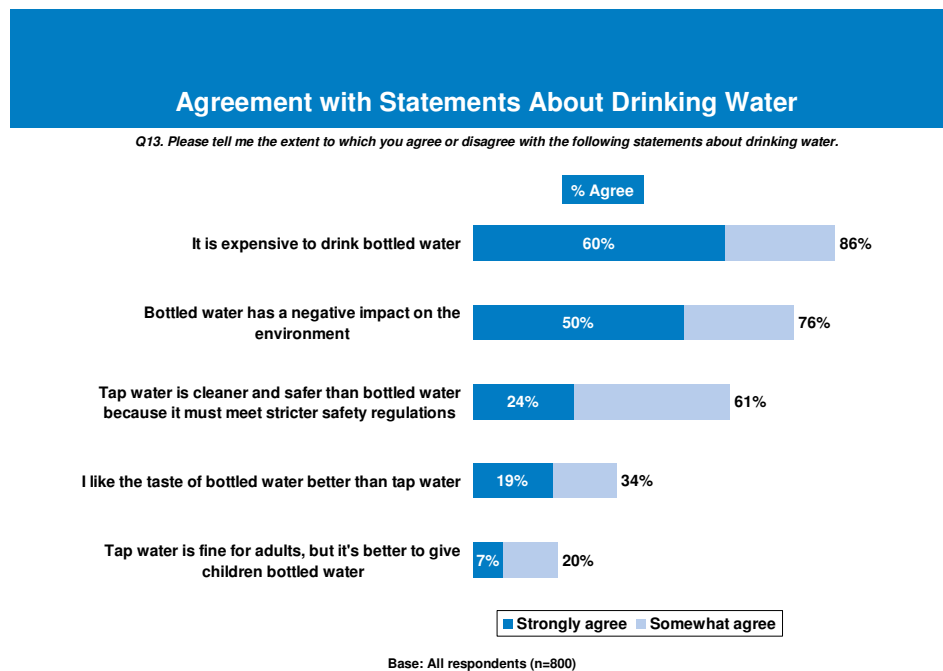
Agreement with Statements About Drinking Water

Consistent with their drinking water behaviours, Metro Vancouver residents' attitudes towards drinking water show a clear preference for tap over bottled water.

The vast majority (86%) of residents agree that “it is expensive to drink bottled water”. Of this, most (60%) “strongly agree” with this statement, highlighting the intensity of attitudes towards the cost of bottled water. This is consistent with other survey results showing that cost is a primary factor in respondents’ decision to drink tap water over bottled water.

In addition to costs, Metro Vancouver residents also recognize the environmental impact of bottled water, with more than three-quarters (76%) agreeing that “bottled water has a negative impact on the environment” (50% “strongly agree”). Furthermore, a similar proportion (78%) *disagrees* with the statement “tap water is fine for adults, but it’s better to give children bottled water”, while 62% *disagree* with the statement “I like the taste of bottled water better than tap water” (37% “strongly disagree”). Overall, these findings point to a very favourable view of tap water over bottled water.

However, the survey suggests residents are less certain about the cleanliness and safety of tap water over bottled water, with fewer (61%) agreeing that “tap water is cleaner and safer than bottled water because it must meet stricter safety regulations” (24% “strongly agree”). While the majority of residents nonetheless agree with this statement, the lower level of agreement (both overall and in intensity) indicates this might be one area in need of increased public education.



Tap water drinkers are more likely than bottled water drinkers to think bottled water is expensive (92% versus 65%) and has a negative impact on the environment (81% versus 57%). They are also more likely to agree that tap water is cleaner and safer than bottled water (69% versus 38%). Conversely, bottled water drinkers are much more likely than tap water drinkers to prefer the taste of bottled water (81% versus 19%) and think tap water is fine for adults but not children (33% versus 14%).

Agreement with Statements About Drinking Water

Q13. Please tell me the extent to which you agree or disagree with the following statements about drinking water.

	% Agree		
	Total (n=800)	Tap Water Drinkers (n=607)	Bottled Water Drinkers (n=162)
It is expensive to drink bottled water	86%	92%	65%
Bottled water has a negative impact on the environment	76%	81%	57%
Tap water is cleaner and safer than bottled water because it must meet stricter safety regulations	61%	69%	38%
I like the taste of bottled water better than tap water	34%	19%	81%
Tap water is fine for adults, but it's better to give children bottled water	20%	14%	33%

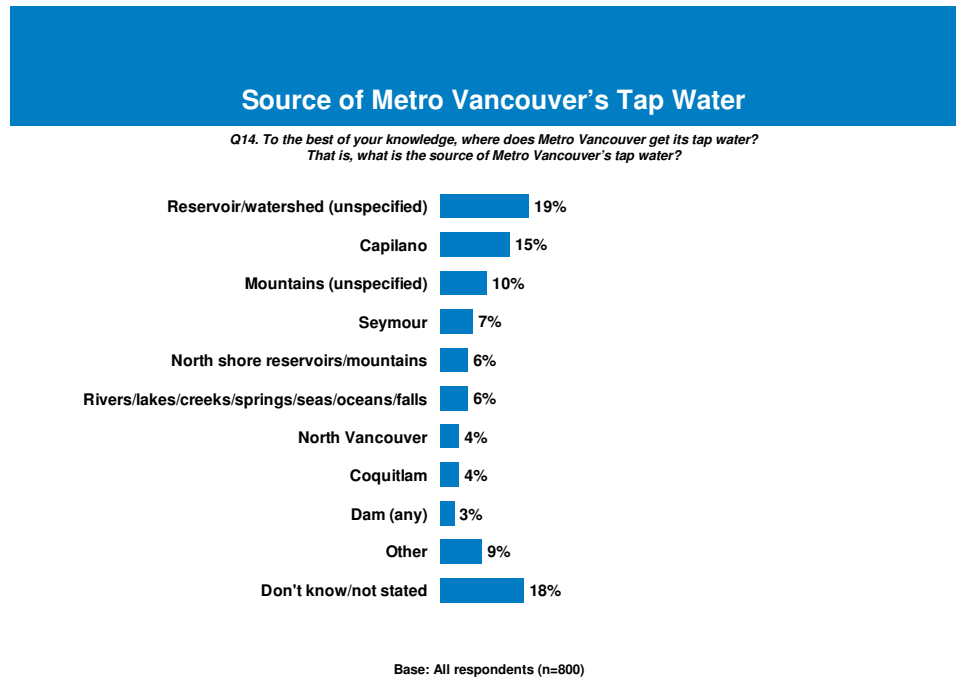
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Awareness and Attitudes Towards Metro Vancouver’s Drinking Water Supply

Source of Metro Vancouver’s Tap Water

Residents are most likely to think Metro Vancouver gets its tap water from reservoirs/watersheds, although do not specify an exact name or location.

When asked where Metro Vancouver gets its tap water, 19% of residents say from a “reservoir or watershed (unspecified)”. Other mentions include “Capilano” (15%) and “mountains (unspecified)” (10%). Overall, these findings suggest residents have at least a basic understanding of where Metro Vancouver gets its tap water, although may not know the specifics of what this includes. Furthermore, nearly two-in-ten (18%) say they “don’t know” the source of the region’s tap water, pointing to an opportunity for increased public education. In addition to growing awareness of the issue, this knowledge may also cause some residents to feel more confident in the region’s drinking water supply.



- ◆ While 15% of tap water drinkers say they “don’t know” where Metro Vancouver gets its tap water, this rises to 29% among bottled water drinkers. Bottled water drinkers’ lower level of familiarity with the region’s water supply may be contributing to their preference for bottled water over tap (e.g., knowing where tap water comes from may address some of their concerns around contaminants and purity).

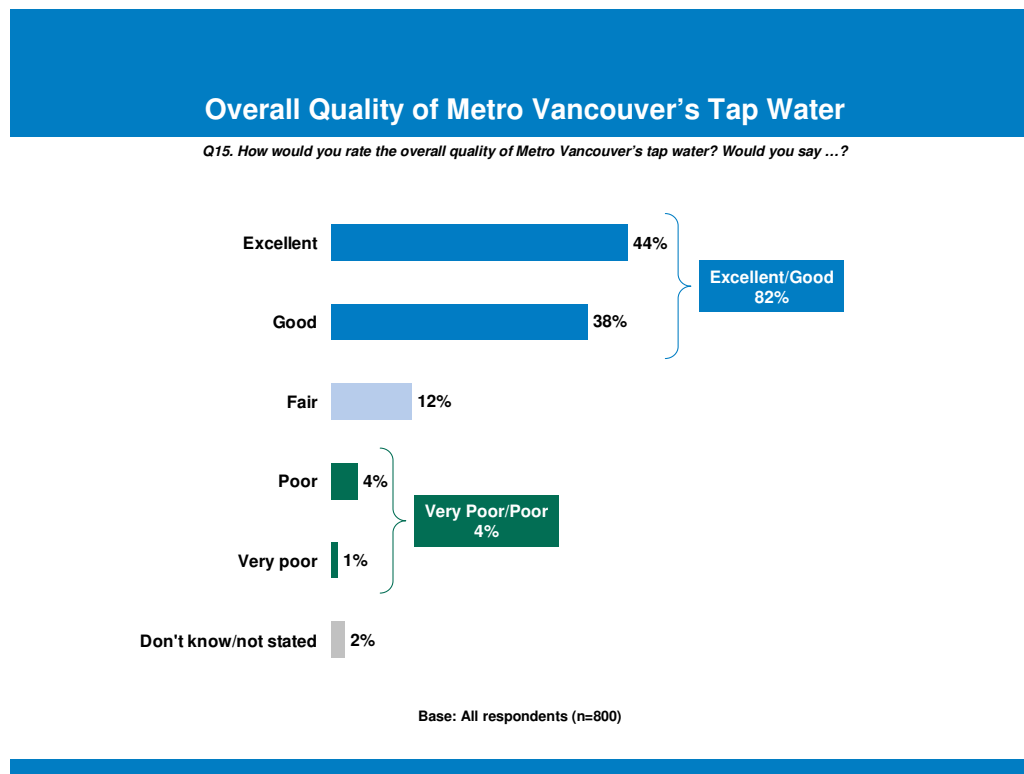
Other respondents who are more likely to say they “don’t know” the source of Metro Vancouver’s tap water include:

- ◆ Those living in the South of Fraser, Northeast, or Vancouver/Burnaby/New Westminister (20%, 19%, and 18%, respectively, compared to a low of 7% among North Shore residents);
- ◆ Women (24%, compared to 11% of men);
- ◆ Those aged 18 to 34 (32%, compared to 12% of 35 to 54 year olds and 13% of those aged 55 or older);
- ◆ Those who have lived in Metro Vancouver for 40 years or less (includes 23% of those who have lived in the area for 20 years or less and 18% of those who have lived in the area for 21 to 40 years, compared to 7% of those who have lived here for more than 40 years);
- ◆ Those who speak a mother tongue other than English (25%, compared to 15% of those who first learned to speak English), and;
- ◆ Those earning less than \$60,000 (24%, compared to 12% of those earning \$60,000 to less than \$120,000).

Overall Quality of Metro Vancouver's Tap Water

Perceptions of the overall quality of Metro Vancouver's tap water are favourable.

The vast majority (82%) of residents rate the overall quality of Metro Vancouver's tap water as "excellent" (44%) or "good" (38%), indicating this is not a concern for most respondents. Furthermore, the relatively high percentage of "excellent" responses highlights the intensity of positive attitudes towards the region's drinking water. Another 12% rate Metro Vancouver's tap water as "fair" and only 4% say ("poor" (4%) or "very poor" (1%).



Tap water drinkers demonstrate a more favourable view than bottled water drinkers towards the quality of Metro Vancouver’s tap water. While 91% of tap water drinkers rate this as “excellent” or “good”, only 55% of bottled water drinkers feel this way.

Overall Quality of Metro Vancouver’s Tap Water – Tap Water Drinkers Versus Bottled Water Drinkers

Q15. How would you rate the overall quality of Metro Vancouver’s tap water? Would you say ...?

	Total (n=800)	Tap Water Drinkers (n=607)	Bottled Water Drinkers (n=162)
Excellent	44%	52%	20%
Good	38%	38%	35%
Fair	12%	6%	29%
Poor	4%	2%	8%
Very poor	1%	0%	2%
Don't know/not stated	2%	1%	6%
Excellent/Good	82%	91%	55%
Very poor/Poor	4%	2%	10%

 = Significant difference

Demographic analysis shows that the percentage rating Metro Vancouver’s tap water as “excellent” or “good” is also higher among:

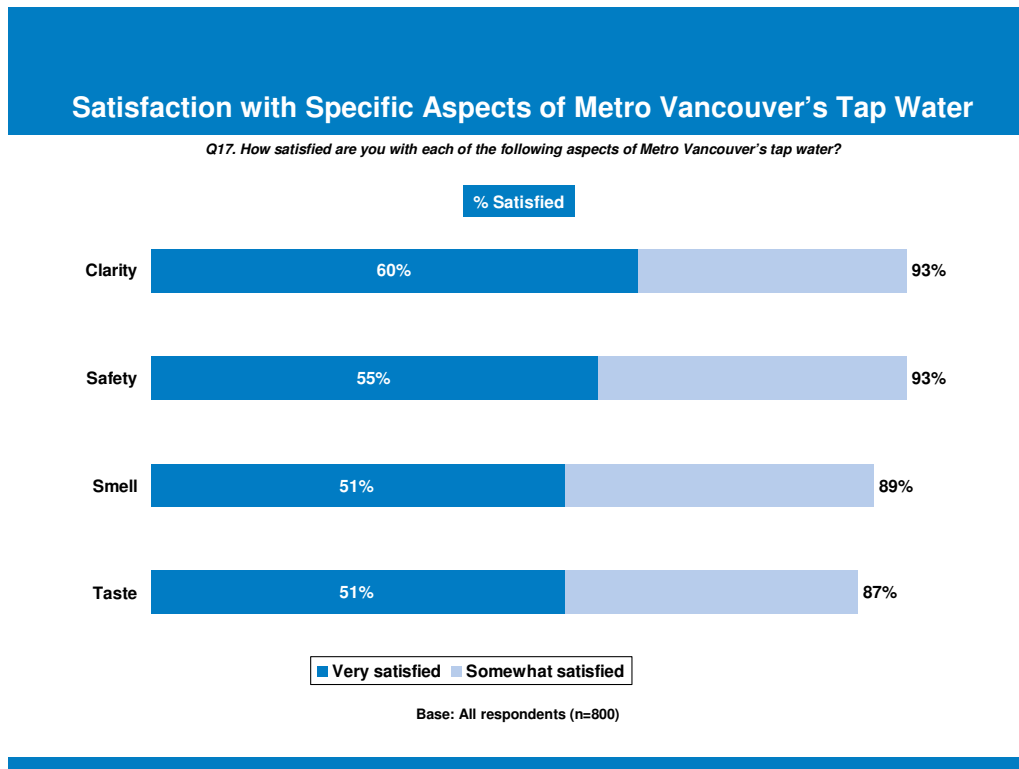
- ◆ Those living on the North Shore (88%, compared to lows of 78% in the Northeast and 80% in the South of Fraser);
- ◆ Men (87%, compared to 78% of women);
- ◆ Those aged 35 or older (includes 86% of 35 to 54 year olds and 87% of those aged 55 or older, compared to 73% of 18 to 34 year olds);
- ◆ Those who have lived in Metro Vancouver for more than 40 years (90%, compared to 78% of those who have lived in the area for 20 years or less);
- ◆ University graduates (88%, compared to 76% of those with some postsecondary education and 80% of those with a high school education or less);
- ◆ Those whose mother tongue is English (86%, compared to 76% of those who first learnt a language other than English); and,
- ◆ Those earning \$120,000 or more (90%, compared to 78% of those earning less than \$60,000).

Satisfaction with Specific Aspects of Metro Vancouver's Tap Water

Residents are also satisfied with the clarity, safety, smell, and taste of Metro Vancouver's tap water.

Metro Vancouver's tap water also scores highly when residents are asked to consider specific aspects of it, including clarity, safety, smell, and taste. The intensity of satisfaction is also high in all instances. Overall, these findings point to a very favourable view of Metro Vancouver's tap water.

- ◆ Clarity: 93% satisfied (60% "very satisfied");
- ◆ Safety: 93% satisfied (55% "very satisfied");
- ◆ Smell: 89% satisfied (51% "very satisfied"); and,
- ◆ Taste: 87% satisfied (51% "very satisfied").



Again, tap water drinkers are more satisfied than bottled water drinkers with Metro Vancouver’s tap water. Higher satisfaction ratings among tap water drinkers are seen across the board for clarity, safety, smell, and taste.

Satisfaction with Specific Aspects of Metro Vancouver’s Tap Water – Tap Water Drinkers Versus Bottled Water Drinkers

Q17. How satisfied are you with each of the following aspects of Metro Vancouver’s tap water?

	% Satisfied		
	Total (n=800)	Tap Water Drinkers (n=607)	Bottled Water Drinkers (n=162)
Clarity	93%	97%	77%
Safety	93%	96%	81%
Smell	89%	94%	70%
Taste	87%	96%	57%

 = Significant difference

Suggestions for Encouraging Residents to Drink More Tap Water

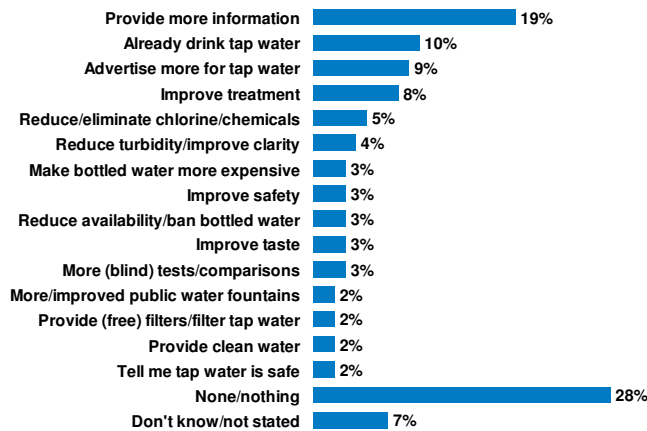
Increased public education may encourage some residents to drink more tap water instead of bottled water.

When asked for things Metro Vancouver can do to encourage residents to drink more tap water instead of bottled water, the number one suggestion is “provide more information” (19%), indicating that residents have some questions about the region’s drinking water (while residents didn’t specifically state what information they would like, possible suggestions include the benefits of tap water, information on the source and/or treatment of Metro Vancouver’s tap water, quality, and safety). Another 9% say “advertise more for tap water”, pointing to further support for a public relations campaign promoting tap water and indicating that simply making this issue more top-of-mind may encourage some to increase their consumption of tap water. Other suggestions focus on improving the quality of the region’s tap water and include “improve treatment” (8%) and “reduce/eliminate chlorine/chemicals” (5%).

It is noteworthy that 10% say they “already drink tap water”, implying that Metro Vancouver need not do anything in order to encourage this behaviour as it is something they are already doing. Furthermore, another 28% say there is “nothing” Metro Vancouver can do to encourage them to drink more tap water, which may also indicate they are already engaged in this behaviour. However, it could also mean that they do not plan on switching to tap water from bottled water, regardless of Metro Vancouver’s efforts in this regard.

Suggestions for Encouraging Residents to Drink More Tap Water

Q18. What, if anything, could Metro Vancouver do to encourage you to drink more tap water instead of bottled water? Anything else?



Multiple mentions accepted.

Only mentions of 2% or more are shown.

Base: All respondents (n=800)

Further analysis of the data shows that while tap water drinkers are looking for more information on tap water (20% say “provide more information”), bottled water drinkers are more concerned about things Metro Vancouver can do to improve the quality of the region’s tap water, including “improve treatment” (17%), “reduce/eliminate chlorine/chemicals” (9%), and “reduce turbidity/improve clarity” (9%). Bottled water drinkers’ suggestions in this regard speak to their concerns about tap water (purity/cleanliness, contaminants, chlorine, bacteria/germs). Another 9% of bottled water drinkers suggest “improve taste”, which, as other survey results show, is the number one reason for drinking bottled water over tap water.

Suggestions for Encouraging Residents to Drink More Tap Water – Tap Water Drinkers Versus Bottled Water Drinkers

Q18. What, if anything, could Metro Vancouver do to encourage you to drink more tap water instead of bottled water? Anything else?

	Total (n=800)	Tap Water Drinkers (n=607)	Bottled Water Drinkers (n=162)
Provide more information	19%	20%	14%
Already drink tap water	10%	13%	2%
Advertise more for tap water	9%	11%	5%
Improve treatment	8%	5%	17%
Reduce/eliminate chlorine/chemicals	5%	3%	9%
Reduce turbidity/improve clarity	4%	3%	9%
Make bottled water more expensive	3%	4%	1%
Improve safety	3%	2%	6%
Reduce availability/ban bottled water	3%	3%	2%
Improve taste	3%	1%	9%
More (blind) tests/comparisons	3%	3%	2%
More/improved public water fountains	2%	2%	2%
Provide (free) filters/filter tap water	2%	2%	2%
Provide clean water	2%	1%	5%
Tell me tap water is safe	2%	2%	3%
None/nothing	28%	30%	23%
Don't know/not stated	7%	6%	10%

= Significant difference

Communication and Information Needs

Trustworthy Information Sources

Non-profit science, environmental, or health organizations are deemed the most trustworthy sources of information about drinking water; Metro Vancouver places second.

Overall, nine-in-ten (89%) residents would trust information about drinking water that was provided by non-profit science, environmental, or health organizations. Of this, most (54%) consider these organizations to be “somewhat trustworthy” while 34% say “very trustworthy”, pointing to a more tempered level of trust even among these groups. That said, non-profit science, environmental, or health organizations would still make potentially good partners for Metro Vancouver in its campaign to spread the word about drinking water.

Metro Vancouver is also considered a trustworthy information source, with 87% of residents saying they would trust information provided by Metro Vancouver (24% “very trustworthy”). The high level of trust residents have in Metro Vancouver is encouraging and indicates Metro Vancouver is in a good place to embark on its public communications campaign regarding drinking water. Further analysis of the data shows that tap water drinkers are particularly trustful of Metro Vancouver (90% trustworthy); while a slightly lower level of trust is seen among bottled water drinkers (80% trustworthy), it is clear that even the vast majority of bottled water drinkers would trust Metro Vancouver to provide accurate and honest information regarding drinking water.

Residents would also trust information coming from different levels of government, although the degree of trust decreases at higher levels.

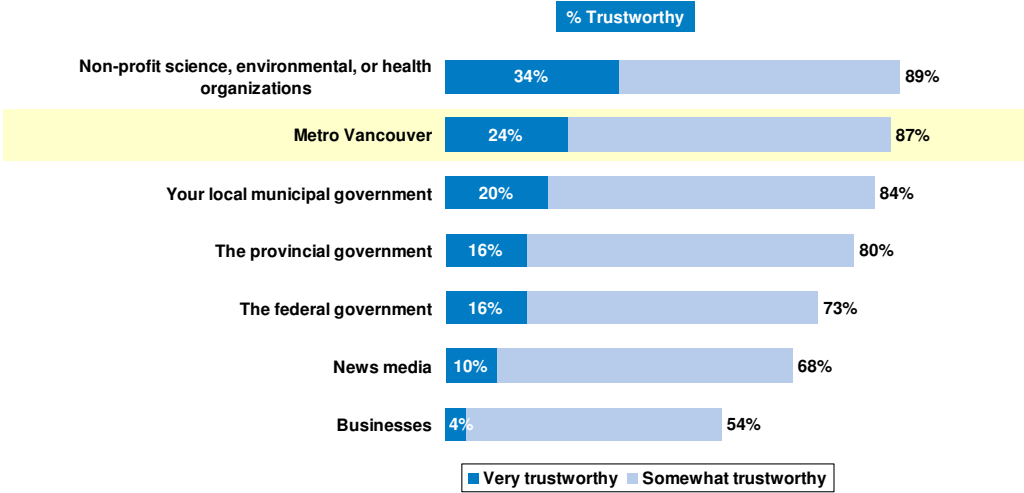
- ◆ Local municipal government: 84% trustworthy (20% “very trustworthy”);
- ◆ Provincial government: 80% trustworthy (16% “very trustworthy”); and,
- ◆ Federal government: 73% trustworthy (16% “very trustworthy”).

While most residents would also trust information provided by the news media (68% trustworthy, 10% “very trustworthy”), the survey suggests there is a pocket of residents who would be sceptical of this information, with 30% rating the news media as an untrustworthy source of information about drinking water.

Residents are even more critical of businesses as a source of information. Only 54% say they would trust information provided by businesses (4% “very trustworthy”), compared to 42% saying untrustworthy. The lower level of trust residents have in businesses to provide accurate and honest information is likely due to questions around businesses’ agenda and motives for being involved in this type of communications activity. If possible, Metro Vancouver may want to avoid partnering with businesses in its drinking water public communications campaign.

Trustworthy Information Sources

Q19. I'm going to read a list of different sources of information about drinking water, including both tap water and bottled water. For each one, please tell me if you consider this to be a trustworthy or untrustworthy source of information.



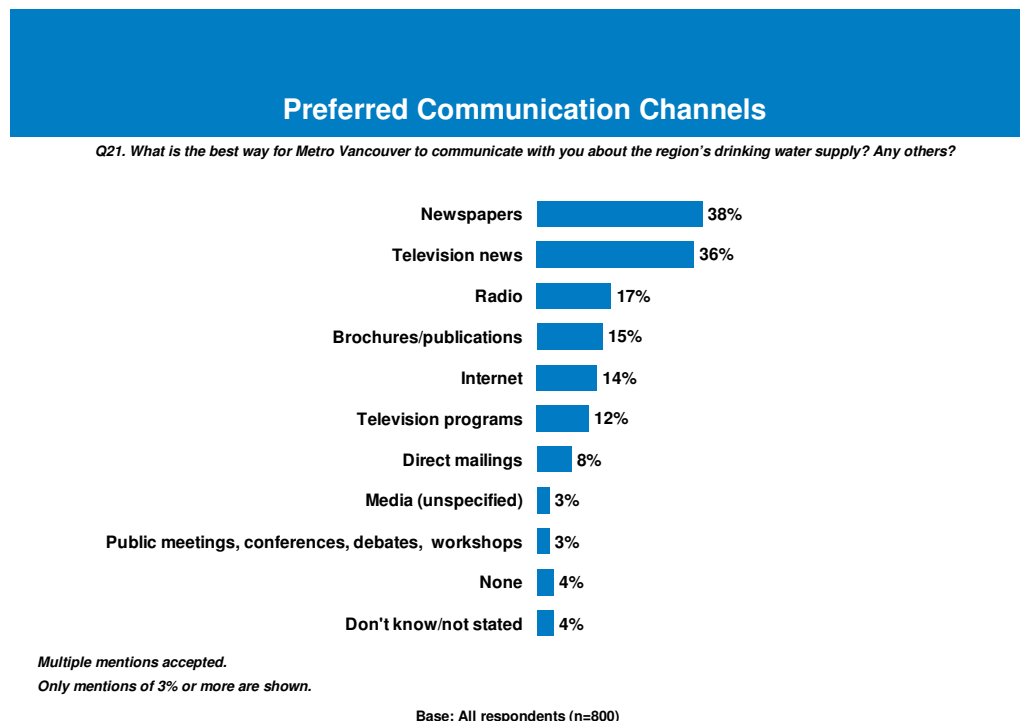
Base: All respondents (n=800)

Preferred Communication Channels

Newspapers and television news top residents' list of preferred communication channels.

When asked for suggestions as to the best way for Metro Vancouver to communicate with them about the region's drinking water, 38% of residents mention newspapers and 36% point to television news. Any communications campaign about drinking water should include both of these mediums if possible. However, given other survey findings showing that information provided by the news media will likely be deemed less trustworthy than information coming from other sources, Metro Vancouver may want to ensure any such communications are accompanied by quotes or endorsements from non-profit science, environmental, or health organizations, your own staff, or representatives from different levels of government (including local municipal governments, the provincial government, and the federal government).

Other preferred communication channels (which could act as secondary sources of information for Metro Vancouver's drinking water campaign) include radio (17%), brochures/publications (15%), Internet (14%), and television programs (12%).



Likelihood of Visiting Various Online Information Sources

While online information sources such as interactive websites, social networking sites, and blogs may attract a pocket of residents, the majority are unlikely to visit these types of resources to learn more about Metro Vancouver's drinking water supply.

On an unprompted basis, 14% of residents identify the Internet as one way they'd like Metro Vancouver to communicate with them about drinking water. This suggests that while the Internet can play a role in informing the public about the region's tap water, many residents would prefer a more traditional communications campaign relying on newspapers, television news, radio, and brochures or pamphlets.

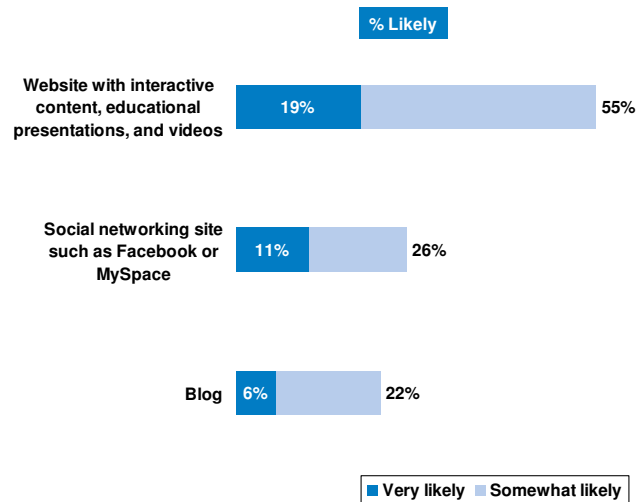
This is consistent with other survey results showing limited interest in various online information sources such as interactive websites, social networking sites, and blogs. Overall, residents are most likely to visit a "website with interactive content, educational presentations, and videos" (55% likely). Of this, 19% are "very likely" to do so, while 36% are only "somewhat likely". The remaining 44% of residents are unlikely to visit an interactive website to learn more about Metro Vancouver's drinking water supply.

Residents are even less likely to visit a social networking site or a blog. The limited appeal of these offerings suggests this is not something Metro Vancouver should invest too heavily in.

- ◆ Social networking site such as Facebook or MySpace: 26% likely (11% "very likely"), compared to 73% of residents who are unlikely to visit this online offering. However, despite this lower level of overall interest, further analysis shows that social networking sites may be a good way of reaching out to bottled water drinkers, with 40% saying they would likely visit such a site to learn more about the region's drinking water supply (compared to only 22% of tap water drinkers).
- ◆ Blog: 22% likely (6% "very likely"), compared to 77% of residents who are unlikely to visit this online offering.

Likelihood of Visiting Various Online Information Sources

Q22. How likely would you be to visit a ... to learn more about Metro Vancouver's drinking water supply?



Base: All respondents (n=800)

While interactive websites, social networking sites, and blogs do not capture the interest of the general population as a whole, further analysis of the data suggests these mediums would have more success in reaching out to younger residents. As such, Metro Vancouver may want to consider using these types of mediums for communications specifically targeted to younger audiences.

- ◆ 61% of those aged 18 to 34 are likely to visit a website with interactive content, educational presentations, and videos, as are 60% of those aged 35 to 54. However, the likelihood of visiting such a site drops to only 43% among those aged 55 or older.
- ◆ 44% of those aged 18 to 34 are likely to visit a social networking site to learn more about the region's drinking water supply, compared to 24% of those aged 35 to 54 and to only 12% of those aged 55 or older.
- ◆ 25% of 18 to 34 year olds and 26% of 35 to 54 year olds are likely to visit a blog, compared to only 13% of those aged 55 or older.

Education also impacts residents' likelihood of visiting these online sources. While university graduates are more likely to visit an interactive website (62%) or a blog (26%), those with a lower level of formal education are more likely to visit a social networking site (includes 39% of those with a high school education or less and 29% of those with some postsecondary education).

Segmentation Analysis

About Segmentation

An attitudinal segmentation was conducted in order to profile and group residents into distinct and addressable segments based on their attitudes towards drinking water. Segmentation (or “cluster analysis”) is a highly advanced analytical technique employing a multivariate examination of a range of inputs that groups survey respondents together based on commonly held opinions and perceptions. The outcome of this analysis is not just a list of segments and their attitudes, but also a detailed description of the behaviours and demographics of these segments. This provides a very strategic level of information into why different population segments behave in certain ways.

Segmenting residents is extremely valuable from a strategic planning perspective. Instead of treating the population as a homogeneous mass, segmentation focuses in on distinct and recognizable sub-groups, thus allowing Metro Vancouver to examine and understand the attitudes, barriers, and motivators that are unique to each segment. This depth of knowledge will give Metro Vancouver the understanding it requires to devise a multifaceted plan that has the right incentives and hits the right triggers to shift attitudes and behaviours among each group of residents - and therefore among a greater proportion of residents.

Similarly, segmentation is also valuable from a communications standpoint. Instead of blanketing the general population with one generic message, segmentation gives you the capability to tailor messages to each specific segment. This produces far more effective communications campaigns, as you will be able to craft messaging to reflect the appeal, language, tone, and call to action that fits best with each segment’s values and lifestyle.

To summarize:

- ◆ Looking to group people based on attitudes.
 - Once we’ve found like-minded people (attitudinally similar segments), we then look at behavioural and demographic differences so that we can profile them and “see” them in everyday life.
- ◆ Segments are almost always a matter of degree.
 - While there can be one or two “dominant” segments, they are very rarely black and white. As you might expect with attitudes, there is a prevailing trend and within that there are segments defined by the shade of grey they occupy within that trend.
- ◆ Segmentation is a qualitative quantitative tool.
 - We are looking to add richness and texture to the numbers by grouping them into segments. As a result, it is as much an art as it is a science and relies on the ability to see trends or themes running through the data. Just as a mosaic is hard to see by looking at one tile, you cannot “see” a segment by looking at an individual data point.

Overview of Segments

Metro Vancouver residents can be divided into four distinct segments when it comes to their attitudes towards drinking water.

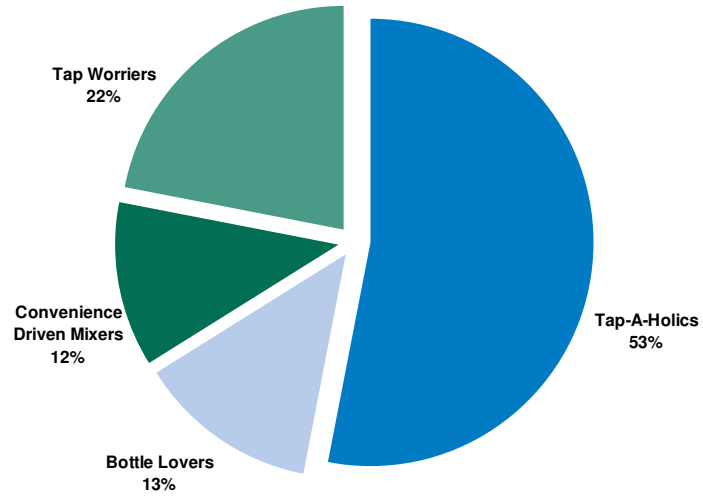
Making up 53% of the population, the **Tap-A-Holics** are defined by a strong preference for tap water over bottled water. While this segment represents the largest segment in the population, they should be considered a secondary target for Metro Vancouver as they already demonstrate the behaviours and attitudes Metro Vancouver wishes to encourage. Rather than focusing on changing behaviours and attitudes, the strategy here should be to maintain and support Tap-A-Holics' current drinking water habits.

At the opposite end of the spectrum are the **Bottle Lovers**, which represent 13% of the population. Bottle Lovers almost exclusively drink bottled water. They present little to no potential for change and should thus be considered a tertiary target for Metro Vancouver.

Convenience Driven Mixers drink a combination of bottled water and tap water. While they demonstrate a slight preference for the taste of bottled water over tap, they are primarily motivated by convenience and tend to fall in between Tap-A-Holics and Bottle Lovers in their attitudes towards drinking water. Although Convenience Driven Mixers are the smallest segment (12%), they nonetheless represent a primary target for Metro Vancouver because there is a good chance of increasing the amount of tap water they drink with the right information and messages.

Representing 22% of the population, **Tap Worriers** are similar to Tap-A-Holics in that they primarily consume tap water. However, while tap water may be Tap Worriers' primary source of drinking water, they nonetheless have some concerns around the quality, cleanliness, safety, and taste of the water they are drinking. Along with Convenience Driven Mixers, Tap Worriers represent a primary target for Metro Vancouver. However, the strategy here will be slightly different - rather than having to convince Tap Worriers to drink more tap water (which they already do), the focus should be on locking Tap Worriers into their current drinking water habits.

Overview of Segments



Tap-A-Holics (53%)



Highlights

Tap-A-Holics are tap water enthusiasts. Tap water is their primary source of drinking water, with tap water comprising more than 95% of the water they consume in a typical day. More so than other segments, Tap-A-Holics are inclined to drink tap water untreated straight from the tap.

Cost is the number one reason Tap-A-Holics drink tap water over bottled water, although taste also plays an important role. On the rare occasion when they do drink bottled water, this is primarily due to convenience rather than any specific concern about tap water.

In fact, further analysis of the data shows that out of all the segments, Tap-A-Holics have the least concerns about drinking tap water, which likely also contributes to their strong preference for tap water over bottled water. Furthermore, Tap-A-Holics are also the most likely to agree that tap water is cleaner and safer than bottled water and the least likely to say they like the taste of bottled water better than tap as well as that children should be given bottled water instead of tap. Again, these findings speak to their overall positive views on tap water.

While Tap-A-Holics demonstrate the most favourable views of tap water, they are much more critical than other segments when it comes to bottled water. For example, Tap-A-Holics express the most concerns about drinking bottled water, particularly when it comes to its environmental impact. They also agree that it is expensive to drink bottled water.

When asked specifically about Metro Vancouver's tap water, Tap-A-Holics again demonstrate a very favourable view. Virtually all rate the overall quality of the region's tap water as excellent or good, and impressions are also very positive when specifically considering things such as taste, safety, clarity, and smell. Tap-A-Holics tend to be more informed about the source of Metro Vancouver's tap water, which may in part explain why they are so confident in its quality.

Tap-A-Holics trust Metro Vancouver to provide accurate and honest information on drinking water. Non-profit science, environmental, or health organizations also score highly, and compared to some other segments, Tap-A-Holics tend to be more trusting of their local municipal and provincial government. Newspapers and television news are their preferred communication channels; conversely, they are less likely than some other segments to

mention brochures/publications and the Internet. Tap-A-Holics are also the least likely to visit a social networking site to learn more about the region's drinking water. While few would also visit a blog, opinion is more mixed when it comes to interactive websites.

Who Are They?

Compared to some other segments, Tap-A-Holics are more likely to be found in Vancouver/Burnaby/New Westminster. While they are equally split among men and women, Tap-A-Holics tend to skew older with an average age of 49 years old. They have also lived in the Metro Vancouver area for a longer period of time, which may have given them a greater opportunity to become familiar with the region's drinking water supply. The majority of Tap-A-Holics were born in Canada and learned English as their mother tongue. Tap-A-Holics are on par with other segments when it comes to both education and income.

Target Potential and Strategy

Tap-A-Holics are an important target for Metro Vancouver because they represent the largest segment in the population. Furthermore, this segment is already instilled with the attitudes and behaviours Metro Vancouver hopes to encourage (i.e., choosing tap water over bottled water) and Metro Vancouver will want to ensure Tap-A-Holics continue to demonstrate these characteristics in the future. However, it is for this same reason that Tap-A-Holics represent a secondary as opposed to primary target as there is little opportunity to increase the amount of tap water they already consume.

Rather than focusing on changing behaviours and attitudes, the strategy here should be to maintain and support Tap-A-Holics' current drinking water habits. This may be as simple as ensuring tap water is available in a variety of locations (for example, installing more public water drinking fountains) so that they do not have to buy bottled water when away from home.

From a communications standpoint, messages that reinforce Tap-A-Holics' belief that bottled water is bad for the environment and expensive will make intuitive sense to this segment. While messages promoting the quality of Metro Vancouver's tap water cannot hurt, the research suggests that these types of messages are also not necessary for this segment as they already feel quite confident in the region's drinking water supply.

When communicating with Tap-A-Holics, newspapers and television news programs would work best, while brochures/publications and the Internet (particularly social networking sites and blogs) would likely have less success with this segment. An interactive website may be of some value although should not be used as a primary means of communication with Tap-A-Holics given their lower overall preference for Internet-based communications.

Bottle Lovers (13%)



Highlights

As the name implies, Bottle Lovers demonstrate a strong preference for bottled water over tap water. In a sense, they can be considered almost the exact opposite of Tap-A-Holics. For example, virtually all the drinking water that Bottle Lovers consume in a typical day is bottled water. Often, they will only drink tap water when bottled water is not available – and on the rare occasion when they do drink tap water, most will filter, boil, or treat it prior to drinking in order to remove impurities and ensure safety.

Bottle Lovers prefer bottled water over tap primarily for its taste, although convenience also plays a role. Out of all the segments, Bottle Lovers have the least concerns about bottled water and are the most likely to say they like the taste of bottled water better than tap water. Clearly, taste is an important motivator for this segment.

While Bottle Lovers have few concerns about bottled water, they do voice concerns about drinking tap water, including contaminants and purity/cleanliness, along with chlorine levels, bacteria/germs, and taste. They are also the least likely to agree that tap water is cleaner and safer than bottled water, all of which suggests that this segment has some concerns about the safety of tap water which may be contributing to their preference for bottled water. While most Bottle Lovers agree it is expensive to drink bottled water, they are still less likely than other segments to feel this way. Bottle Lovers are also split as to the environmental impact of bottled water, suggesting this segment has not bought into all the recent media attention focusing on how bottled water is bad for the environment.

Bottle Lovers are less familiar with the source of Metro Vancouver's drinking water, and it is possible this lack of familiarity is making them question its quality and safety. Bottle Lovers are also the most critical of Metro Vancouver's tap water in terms of overall quality as well as taste, smell, clarity, and safety.

When asked for ways Metro Vancouver could encourage them to drink more tap water instead of bottled water, one-quarter of Bottle Lovers recommend improving the treatment of tap water. Other suggestions include reducing or eliminating the chlorine and chemicals in the water and reducing turbidity, all of which reflect this segment's concern over the

quality and safety of the region's drinking water. Some also suggest providing more information, indicating they may be more receptive to tap water if they knew more about it. Lastly, improving the taste of tap water may also encourage some Bottle Lovers to switch to tap.

Generally speaking, Bottle Lovers tend to be more sceptical of organizations, including Metro Vancouver, that provide information on drinking water, which means getting through to them may be more difficult. Television news is a good way of communicating with this segment. While newspapers are also a preferred communication channel, Bottle Lovers are less likely than Tap-A-Holics to mention this as a good way of communicating with them. However, Bottle Lovers are more likely than some other segments to mention direct mailings. When it comes to online information sources, very few Bottle Lovers would visit a blog to learn more about the region's drinking water supply. While they are more likely than some other segments to visit a social networking site, the majority of Bottle Lovers still say they would be unlikely to do so. Of the online options tested, an interactive website would likely have the greatest success at attracting the attention of Bottle Lovers.

Who Are They?

Bottle Lovers are most likely to be found living in the South of Fraser. This segment skews female and, with an average age of 38 years, represents the youngest of the four segments. Bottle Lovers have lived in Metro Vancouver for a shorter period of time, which may explain why they are less familiar with the region's drinking water supply. Most Bottle Lovers were born in Canada and learned English as their mother tongue. Bottle Lovers are on par with other segments when it comes to both education and income.

Target Potential and Strategy

Bottle Lovers present little to no potential for change and so should be considered a tertiary target for Metro Vancouver. On the positive side, this segment represents one of the smallest in the population and thus Metro Vancouver would only be missing out on a limited number of residents in its campaign to move people towards drinking more tap water.

Bottle Lovers are motivated by taste and consistently show a preference for the taste of bottled water over tap. Unless Metro Vancouver can do something to alter the taste of its tap water (which is not recommended as it runs the risk of turning off other segments, particularly Tap-A-Holics), getting Bottle Lovers to switch to tap water will be a challenge.

While taste is clearly an important factor in Bottle Lovers' preference for bottled water over tap, the research suggests this may also be a result of some specific concerns about the quality and safety of tap water. It is here where Metro Vancouver could possibly make some headway into changing the attitudes and behaviours of Bottle Lovers. For example, educating this segment on the source of Metro Vancouver's tap water, along with providing information on treatment and safety, may motivate some to drink more tap water.

The research suggests Bottle Lovers may also need to be convinced of the environmental impact of bottled water. However, there is no evidence to indicate that doing so would actually motivate them to change their behaviour and drink more tap water.

In addition to their overall attitudes towards bottled water versus tap water, changing the behaviour of Bottle Lovers may also be more difficult given that they are less trusting of organizations (including Metro Vancouver) speaking on this issue. As such, getting through to these individuals will first require convincing them that you are telling the truth and have their best interests at heart. In terms of how to communicate with Bottle Lovers, the research suggests the most effective methods would be television news and newspapers; direct mailings and a social networking site may also be effective in reaching out to this segment specifically.

In summary, any efforts to try and change Bottle Lovers' attitudes and behaviours will likely be met with resistance. As such, Metro Vancouver's investment in this segment should be minimal, if anything.

Convenience Driven Mixers (12%)



Highlights

Convenience Driven Mixers drink a combination of bottled water and tap water. However, while they regularly consume both types of water, further analysis of the data does point to an overall preference for bottled water over tap. For example, this segment will consume slightly more bottled water than tap water in a typical day – and when they do drink tap water, most will filter, boil, or treat it prior to drinking. Convenience Driven Mixers treat their tap water primarily to improve the taste.

What motivates Convenience Driven Mixers to choose one type of water over another? Overall, the research indicates this primarily comes down to a matter of convenience, suggesting that this segment is not terribly picky about the type of water they drink and will generally opt for whatever is most convenient at the time. However, taste also plays a role in this decision, which tends to tip the scale in favour of bottled water rather than tap.

Convenience Driven Mixers fall between Tap-A-Holics and Bottle Lovers in their attitudes towards drinking water. While Convenience Driven Mixers do have some concerns about tap water (primarily contaminants, purity/cleanliness, and chlorine), they generally express fewer concerns than Bottle Lovers. Furthermore, the majority of Convenience Driven Mixers agree that tap water is cleaner and safer than bottled water, suggesting that while they may have some concerns around contaminants and cleanliness, overall perceptions of tap water are nonetheless positive.

This segment also has some concerns about bottled water (primarily around contaminants from the bottle, environmental impact, cost, and purity/cleanliness), although do not voice as many concerns as Tap-A-Holics. When specifically asked, Convenience Driven Mixers agree that bottled water is expensive and has a negative environment impact. However, the majority nonetheless prefer the taste of bottled water to tap water. Overall, these findings suggest that while this segment prefers the taste of bottled water over tap, the convenience of tap water, combined with their views on the cost and environmental impact of bottled water, motivates them to drink a combination of the two types of drinking water.

Convenience Driven Mixers' overall perceptions of Metro Vancouver's tap water are generally favourable, and tend to lie between Tap-A-Holics' ringing endorsement and Bottle Lovers' more tempered view. Specifically, the majority of Convenience Driven Mixers rate the overall quality of Metro Vancouver's tap water as excellent or good, and are also satisfied with its safety, clarity, smell, and to a lesser degree, taste.

More so than other segments, Convenience Driven Mixers have a difficult time coming up with specific suggestions as to what Metro Vancouver could do to encourage them to drink more tap water instead of bottled water. This could reflect their overall views on the taste of tap water versus bottled water, but may also point to an overall lack of engagement with the subject as their choice of water very often just comes down to a matter of convenience. That said, the number one suggestion is provide more information, indicating a communications campaign may be effective in swaying the attitudes and behaviours of some Convenience Driven Mixers.

Encouragingly, Convenience Driven Mixers tend to be one of the most trusting segments when it comes to Metro Vancouver as a source of information on drinking water. They also exhibit a high level of trust in non-profit science, environmental, or health organizations and the provincial government. Similar to other segments, their preferred communication channels include television news and newspapers, although Convenience Driven Mixers are also more likely to mention brochures/publications and the Internet. This preference for online communications may be why they are more likely than other segments to visit a blog to learn more about Metro Vancouver's drinking water supply. That said, a blog still only appeals to roughly one-third of Convenience Driven Mixers. Of the online options tested, an interactive website would likely have the greatest success in reaching this segment.

Who Are They?

Convenience Driven Mixers are primarily concentrated in Vancouver/Burnaby/New Westminister and less likely than some other segments to be found living in the South of Fraser. Convenience Driven Mixers skew slightly female and, with an average age of 42 years, they are the second youngest segment. Compared to Tap-A-Holics, Convenience Driven Mixers have lived in Metro Vancouver for a shorter period of time, and are also more likely to have moved to Canada from someplace else. While most learned English as their mother tongue, this segment represents a greater number of Chinese residents. Convenience Driven Mixers are on par with other segments when it comes to education and income.

Target Potential and Strategy

While Convenience Driven Mixers are the smallest segment, they nonetheless represent a primary target for Metro Vancouver as they already drink some tap water and are generally confident in its safety. However, they also drink a relatively large amount of bottled water and thus represent an opportunity to shift drinking habits towards increased tap water consumption.

Given that Convenience Driven Mixers already demonstrate some of the behaviours and attitudes Metro Vancouver hopes to encourage, getting this segment to switch to tap water will be much easier than going after Bottle Lovers. Rather than requiring a major overhaul in opinion towards tap water versus bottled water, the challenge for Metro Vancouver will be convincing Convenience Driven Mixers that the benefits of drinking tap water exceed the slight preference in taste they have for bottled water. One way of doing this may be via messages that reinforce their thinking on the environmental impact and costs of bottled water. At the same time, Metro Vancouver may want to play up the quality of the region's drinking water in an effort to drive home messages about its safety and perhaps even shift thinking towards its taste.

Convenience is also key to this segment and the research suggests motivating them to switch to tap water will be much easier if it is perceived as a convenient and widely available option. At the same time, Metro Vancouver may want to look at ways to reduce the availability of bottled water (for example, banning or restricting its sale in public places and parks) so that it becomes a less convenient option. Measures that increase the cost of bottled water (such as an increase in price, additional taxes, or a higher deposit fee at the point of purchase) may also help lessen the appeal of bottled water.

When communicating with Convenience Driven Mixers, Metro Vancouver may want to consider partnering with non-profit science, environmental, or health organizations or the provincial government, both of which are deemed highly trustworthy sources of information. While television news and newspapers are two of Convenience Driven Mixers' preferred ways of learning about the region's drinking water supply, news media scores relatively low on the trustworthy scale. To counteract this, Metro Vancouver may want to ensure that any news stories are accompanied by endorsements or quotes from non-profit science, environmental, or health organizations, the provincial government, or your own staff. In addition to the communication channels listed above, the research suggests that brochures/publications and the Internet (interactive website, blog) may also be effective when reaching out to this segment specifically.

Tap Worriers (22%)



Highlights

Tap Worriers are similar to Tap-A-Holics in that they primarily drink tap water. However, while Tap-A-Holics tend to drink water straight from the tap, Tap Worriers will filter, boil, or treat tap water prior to drinking. This is mainly to remove impurities, although some also filter, boil, or treat their tap water to improve the taste or remove chemicals.

Tap Worriers' preference for tap water over bottled water is primarily driven by cost, similar to Tap-A-Holics. However, Tap Worriers are much more likely than Tap-A-Holics to say they drink tap water out of convenience, while Tap-A-Holics attach a greater emphasis to taste. Convenience is also the main reason why Tap Worriers will occasionally drink bottled water.

Tap Worriers and Tap-A-Holics also differ in their attitudes towards tap water. While Tap-A-Holics generally have few concerns about drinking tap water, Tap Worriers are much more likely to cite concerns around purity/cleanliness, contaminants, chlorine levels, and bacteria/germs. They are also less likely to agree that tap water is cleaner and safer than bottled water, and have a mixed view of the taste of tap water versus bottled water. These findings show that while tap water may be Tap Worriers' primary source of drinking water, they nonetheless have some concerns about the water they are consuming.

On an unprompted basis, Tap Worriers number one concern about bottled water is cost, followed by contaminants from the bottle and its environmental impact. When specifically asked, the majority also agree that bottled water is expensive and has a negative environmental impact, all of which suggests that cost, health concerns, and the environment are barriers to this segment embracing bottled water.

Compared to Tap-A-Holics, Tap Worriers have a more tempered view of Metro Vancouver's tap water, both overall and in specific areas (clarity, safety, smell, taste). Despite this, overall perceptions can still be considered favourable which is likely why Tap Worriers continue to drink tap water despite having some concerns about the quality of the water they are drinking.

The research shows that the best way to encourage Tap Worriers to drink more tap water instead of bottled water is to provide them with more information, including doing more advertising around tap water. Some also suggest improved treatment which may help alleviate some of their concerns about the quality and cleanliness of tap water.

Analysis of Tap Worriers' communication and information needs shows these are generally on par with the norm. For example, Tap Worriers' most trusted sources of information are non-profit science, environmental, or health organizations and Metro Vancouver; however, as compared to Tap-A-Holics, they are less trusting of local municipal governments and the provincial government. When communicating with Tap Worriers, the preferred channel of communication is the newspaper, followed by the television news (although not to the extent mentioned by Tap-A-Holics) and radio. While most would visit an interactive website to learn more about the region's drinking water supply, few would visit a social networking site or blog.

Who Are They?

Tap Worriers skew towards those living in the South of Fraser. While they are equally split among men and women, this segment does tend to skew older, with an average age of 47 years. Tap Worriers have lived in Metro Vancouver for a longer period of time than some other segments. Most were born in Canada, and while the majority learned English as their mother tongue, out of all the segments they are the most likely to have a mother tongue other than English (some of the more common mother tongues included in this segment are Cantonese, German, and Punjabi). While Tap Worriers are on par with other segments when it comes to education, their annual household incomes skew lower.

Target Potential and Strategy

Tap Worriers are another primary target for Metro Vancouver. However, because they already drink much more tap water than bottled water, the focus here should be on locking them into their current behaviours rather than attempting to increase the amount of tap water they drink. By convincing Tap Worriers that tap water is clean and safe, Metro Vancouver can proactively address concerns that, if left unchecked, may eventually cause some to switch to bottled water away from tap. Furthermore, because Tap Worriers also represent the second largest segment, Metro Vancouver also has the opportunity to change the attitudes of a large number of residents by focusing on this one segment.

Messages that focus on the safety and cleanliness of tap water will likely have the greatest impact on Tap Worriers, and hopefully address their concerns about the quality of the region's drinking water. If possible, Metro Vancouver may also want to provide some scientific evidence comparing the quality of the region's tap water to bottled water to further drive home the point that our tap water is clean and safe to drink. These messages could be coupled with other communications focusing on the cost and environmental impact of bottled water, although the research suggests these may be less effective in motivating Tap Worriers to drink tap water over bottled water.



When communicating with Tap Worriers, information coming from non-profit science, environmental, or health organizations and Metro Vancouver will most likely be deemed the most trustworthy. Good communication channels include the newspaper, television news, and radio. There is also evidence to suggest an interactive website would be effective.



Segment Summary

Segment Summary

Name	Tap-A-Holics	Bottle Lovers	Convenience Driven Mixers	Tap Worriers
Percent of Population	53%	13%	12%	22%
Demographic Profile	<ul style="list-style-type: none"> Vancouver/Burnaby/New Westminster Skew older Lived in MV longer Born in Canada 	<ul style="list-style-type: none"> South of Fraser Skew female Youngest segment Lived in MV less time Born in Canada 	<ul style="list-style-type: none"> Vancouver/Burnaby/New Westminster Skew female Less likely to have been born in Canada 	<ul style="list-style-type: none"> South of Fraser Skew older Most likely have non-English mother tongue Lower income
Drinking Water Behaviours	<ul style="list-style-type: none"> Almost exclusively drink tap water (cost, taste) Less likely to treat tap water prior to drinking 	<ul style="list-style-type: none"> Almost exclusively drink bottled water (taste, convenience) 	<ul style="list-style-type: none"> Drink bottled and tap but slight preference for bottled Will treat tap water prior to drinking 	<ul style="list-style-type: none"> Drink tap water (cost, convenience) Will treat tap water prior to drinking
Attitudes Towards Drinking Water	<ul style="list-style-type: none"> Few concerns about tap water More critical of bottled water (environmental impact, expensive) 	<ul style="list-style-type: none"> Few concerns about bottled water More critical of tap (contaminants, purity, chlorine, germs) Split on environmental impact of bottled 	<ul style="list-style-type: none"> Convenience is key Have some concerns about tap but generally safe Bottled water is expensive, bad for environment 	<ul style="list-style-type: none"> Have some concerns about tap water (purity, contaminants, chlorine, germs) Cost is a concern with bottled water
Perceptions of Metro Vancouver's Tap Water	<ul style="list-style-type: none"> Very favourable view of region's tap water More informed about the source of MV's tap water 	<ul style="list-style-type: none"> More critical of region's tap water Less well informed about the source of MV's tap water 	<ul style="list-style-type: none"> Overall positive More satisfied with safety, clarity, and smell than with taste 	<ul style="list-style-type: none"> Overall positive but more tempered than Tap-A-Holics
Communication and Information Needs	<ul style="list-style-type: none"> More trusting of MV Newspapers, TV news Less likely to visit social networking site 	<ul style="list-style-type: none"> Less trusting of MV TV news, newspapers, direct mailings More likely to visit social networking site Less likely to visit blog 	<ul style="list-style-type: none"> More trusting of MV TV news, newspapers, brochures, Internet (website, blog) 	<ul style="list-style-type: none"> Newspaper, TV news, radio
Target Potential and Strategy	<ul style="list-style-type: none"> Secondary target Maintain and support current drinking water habits 	<ul style="list-style-type: none"> Tertiary target Represent little to no potential for change 	<ul style="list-style-type: none"> Primary target Focus on getting to drink more tap water and less bottled water 	<ul style="list-style-type: none"> Primary target Focus on locking in current behaviours by changing attitudes towards tap water



APPENDIX: QUESTIONNAIRE

Hello, this is _____ from Ipsos Reid, a professional public opinion research firm. We are not selling anything. Today we're conducting a survey of Metro Vancouver residents to learn their views on drinking water.

(IF NECESSARY: Please be assured that this survey is completely confidential.)

(IF NECESSARY: The survey will take about 12 minutes to complete.)

(INTERVIEWER NOTE: If inconvenient timing, schedule a call back.)

May I please speak with the person in your household 18 years of age or older who most recently had a birthday? Is that you?

Yes **[CONTINUE]**

Don't know **[ASK AGAIN. IF STILL DK/REF, THANK & TERMINATE]**

No

May I please speak to that person? **[READ INTRODUCTION]**

A. First of all, do you or does anyone in your household work for **(READ LIST)?**

[RANDOMIZE]

Metro Vancouver

An advertising agency

The media, that is a radio or TV station, newspaper, or magazine

A market research firm

(DO NOT READ) None

[IF 'NONE' IN QA, CONTINUE. OTHERWISE, THANK & TERMINATE.]

B. In what community do you live? **(READ LIST TO PROMPT IF NECESSARY)**
[ACCEPT 1 MENTION ONLY]

[DO NOT RANDOMIZE]

Anmore [ANN-MORE]

Belcarra [BELL-CARE-RA]

Bowen Island

Burnaby

Coquitlam [KO-QUIT-LUM]

Delta (includes North Delta, Tsawwassen [TA-WASS-SEN], and Ladner [LAD-NER])

Langley (City)

Langley (Township)

Lions Bay

Maple Ridge





- New Westminster
- North Vancouver (City)
- North Vancouver (District)
- Pitt Meadows
- Port Coquitlam [KO-QUIT-LUM]
- Port Moody
- Richmond
- Surrey
- Vancouver
- West Vancouver
- White Rock
- Other [do not specify]

[IF 'OTHER/DK/REF' IN QB, THANK & TERMINATE. OTHERWISE, CONTINUE.]

C. RECORD GENDER: (DO NOT ASK)

- Male
- Female

DRINKING WATER BEHAVIOURS

First, a few general questions about the type of water you drink.

1. [delete]
2. What type of drinking water do you personally consume most often? Please think about all the water that you drink in a typical day, whether this be at home, at work, or anywhere else. Would you say you most often consume **[INSERT ITEM]** or **[INSERT ITEM]**? (INTERVIEWER NOTE: If respondent says they drink filtered tap water, record as tap water.)

[RANDOMIZE]

- Tap water
- Bottled water
- (DO NOT READ)** Combination of both

[IF 'TAP WATER' IN Q2, ASK Q3. OTHERWISE, SKIP TO Q4.]

3. What is the main reason why you usually drink tap water over bottled water? Any other reasons? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Cost
- Taste
- Convenience





- Environmental reasons
- Safe
- Health reasons
- Other [specify]

[IF 'BOTTLED WATER' IN Q2, ASK Q4. OTHERWISE, SKIP TO Q5.]

4. What is the main reason why you usually drink bottled water over tap water? Any other reasons? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Cost
- Taste
- Convenience
- Environmental reasons
- Safe
- Health reasons
- Other [specify]

[ASK ALL]

5. In a typical day, approximately what percentage of the water you drink is **[INSERT ITEM]? (RECORD %)** And what percentage is **[INSERT ITEM]? (RECORD %)**

[RANDOMIZE]

- Tap water
- Bottled water

[RANGE 0% TO 100%]

[TOTAL MUST ADD TO 100%]

[CANNOT SAY % TO ONE OPTION AND 'DK/REF' TO ANOTHER; MUST EITHER SAY 'DK/REF' TO BOTH OR % TO BOTH. IF 'DK/REF' TO FIRST OPTION, DO NOT ASK ABOUT SECOND AS IT WILL ALSO BE 'DK/REF'.]

[IF 'TAP WATER' IN Q2 AND '1% OR MORE' TO BOTTLED WATER IN Q5, ASK Q6. OTHERWISE, SKIP TO Q7.]

6. What is the main reason why you sometimes drink bottled water instead of tap water? Any other reasons? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Convenience/portability
- Health reasons
- Safe
- Taste
- Available at work
- Like to have cold water
- Tap water not available
- Buy it while traveling
- Other [specify]





[IF 'BOTTLED WATER' IN Q2 AND '1% OR MORE' TO TAP WATER IN Q5, ASK Q7. OTHERWISE, SKIP TO Q8.]

7. What is the main reason why you sometimes drink tap water instead of bottled water?
Any other reasons? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Convenience
- Health reasons
- Safe
- Taste
- Available at work
- Like to have cold water
- Bottled water not available
- Environmental reasons
- Cost
- Other [specify]

[IF '1% OR MORE' TO TAP WATER IN Q5, ASK Q8-Q9. OTHERWISE, SKIP TO Q11.]

8. When drinking tap water, do you usually drink it straight from the tap or do you usually filter, boil, or treat it in some way?

- Untreated straight from the tap
- Filtered, boiled or treated
- (DO NOT READ)** Both

[IF 'FILTERED, BOILED, OR TREATED' IN Q8, ASK Q9. OTHERWISE, SKIP TO Q11.]

9. Why do you usually filter, boil, or treat tap water in some way before drinking it? Any other reasons? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- To remove impurities
- To ensure safety
- To improve taste
- To remove chemicals
- Filtered/treated water is healthier
- Prefer filtered water
- Keep water cold
- Other [specify]

[ASK ALL]

10. [delete]





ATTITUDES TOWARDS DRINKING WATER

[RANDOMIZE ORDER OF Q11 AND Q12.]

11. What, if any, concerns do you have about drinking tap water? Any others? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Purity/cleanliness
- Contaminants
- Discolouration
- Taste
- Bacteria/germs
- Chlorine levels
- Lack of regulation
- Turbidity
- Other [specify]
- None

12. What, if any, concerns do you have about drinking bottled water? Any others? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Purity/cleanliness
- Contaminants in water
- Contaminants from bottle
- Taste
- Bad for environment
- Lack of regulation
- Other [specify]
- None

13. Please tell me the extent to which you agree or disagree with the following statements about drinking water. The first one is **[INSERT ITEM]**. Would you say you **(READ LIST)?** How about **[INSERT ITEM]**? **[REPEAT LIST IF NECESSARY]**

[RANDOMIZE]

- Tap water is cleaner and safer than bottled water because it must meet stricter safety regulations
- I like the taste of bottled water better than tap water
- It is expensive to drink bottled water
- Bottled water has a negative impact on the environment
- Tap water is fine for adults, but it's better to give children bottled water





- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree

AWARENESS AND ATTITUDES TOWARDS METRO VANCOUVER'S DRINKING WATER SUPPLY

Changing topics slightly...

14. To the best of your knowledge, where does Metro Vancouver get its tap water? That is, what is the source of Metro Vancouver's tap water? **[ACCEPT 1 MENTION]**

15. How would you rate the overall quality of Metro Vancouver's tap water? Would you say **(READ LIST)?**

- Excellent
- Good
- Fair
- Poor
- Very poor

16. [delete]

17. How satisfied are you with each of the following aspects of Metro Vancouver's tap water? The first one is **[INSERT ITEM]**. Would you say you are **(READ LIST)?** How about its **[INSERT ITEM]? (REPEAT LIST IF NECESSARY)**

[RANDOMIZE]

- Taste
- Safety
- Smell
- Clarity

- Very satisfied
- Somewhat satisfied
- Not very satisfied
- Not at all satisfied

As you may know, the term 'Metro Vancouver' is a geographic reference but also refers to a regional government body that services 22 member municipalities and one electoral area. For the next few questions, please think about Metro Vancouver as the regional government body.





18. What, if anything, could Metro Vancouver do to encourage you to drink more tap water instead of bottled water? Anything else? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Provide more information
- Reduce turbidity/improve clarity
- Improve treatment
- Already drink tap water
- None/nothing
- Other [specify]

COMMUNICATION AND INFORMATION NEEDS

Changing topics slightly...

19. I'm going to read a list of different sources of information about drinking water, including both tap water and bottled water. For each one, please tell me if you consider this to be a trustworthy or untrustworthy source of information. The first one is **[INSERT ITEM]**. Would you say **(READ LIST)**? How about **[INSERT ITEM]**? **(REPEAT LIST IF NECESSARY)**

[RANDOMIZE]

- Metro Vancouver
- Your local municipal government
- The provincial government
- The federal government
- News media
- Non-profit science, environmental, or health organizations
- Businesses

- Very trustworthy
- Somewhat trustworthy
- Not very trustworthy
- Not at all trustworthy

20. [delete]

21. What is the best way for Metro Vancouver to communicate with you about the region's drinking water supply? Any others? **(DO NOT READ LIST) [ACCEPT 2 MENTIONS]**

- Newspapers
- Television news
- Television programs
- Radio





- Family and friends
- Internet
- School or work
- Brochures/publications
- Magazines or journals
- Public meetings, conferences, debates, or workshops
- Other [specify]
- None

22. How likely would you be to visit a **[INSERT ITEM]** to learn more about Metro Vancouver’s drinking water supply? Would you say **(READ LIST)**? How about a **[INSERT ITEM]**? **(REPEAT LIST IF NECESSARY)**

[RANDOMIZE]

- Blog (IF NECESSARY: A blog is a website with regular entries of commentary, descriptions of events, or other material such as graphics or video.)
- Social networking site such as Facebook or MySpace
- Website with interactive content, educational presentations, and videos

- Very likely
- Somewhat likely
- Not very likely
- Not at all likely

23. [delete]

GENERAL LIFESTYLE ATTITUDES

Changing topics slightly...

24. [delete]

25. In the past twelve months, have you **[INSERT ITEM]**? What about **[INSERT ITEM]**?

[RANDOMIZE]

- Volunteered in your community
- Written a letter to the editor of a newspaper
- Written a letter, email, or made a phone call to an elected official
- Called a local talk show to voice your opinion about an issue you were particularly concerned about
- Attended a public meeting on a local issue

- Yes
- No





DEMOGRAPHICS

Finally, just a few last questions for statistical purposes...

26. In what year were you born? **(RECORD YEAR)**

[RANGE 1900 TO 1990]

27. [delete]

28. How many years have you lived in the Metro Vancouver area? **(RECORD NUMBER OF YEARS) (IF LESS THAN 1 YEAR, ENTER 0)**

[RANGE 0 TO 100]

29. What is the highest level of formal education that you have completed? Please stop me when I've reached your category. **(READ LIST) [ACCEPT 1 MENTION ONLY]**

[DO NOT RANDOMIZE]

Grade school or some high school

Completed high school

Completed technical or trade school/community college

Some community college or university, but did not finish

Completed university degree, such as a Bachelor's

Post-graduate degree, such as a Master's or Ph.D

(DO NOT READ) Other [do not specify]

30. Were you born in Canada or did you move here from someplace else?

Born in Canada

Moved here from someplace else

31. What is the language that you first learned at home in childhood and still understand? **(DO NOT READ LIST) [ACCEPT 1 MENTION]**

English

French

Cantonese

Mandarin

Punjabi

Tagalog

German

Korean

Spanish

Persian (Farsi)





Vietnamese
Hindi
Italian
Japanese
Polish
Dutch
Other [specify]

32. Which of the following broad categories best describes your family income? That is the combined total income before taxes of all persons in your household. Please stop me when I've reached your category. **(READ LIST)**

Under \$30,000
\$30,000 to just under \$60,000
\$60,000 to just under \$90,000
\$90,000 to just under \$120,000
\$120,000 or more

33. **RECORD REGION [FROM SAMPLE]**

That's all the questions I have. On behalf of myself and Ipsos Reid, I'd like to thank you very much for your time and opinions. Have a good evening.

