

2016 Ipsos Reid Survey Overview

About the 2016 survey

In May 2016, the BC Water & Waste Association (BCWWA) partnered with Ipsos Reid on the annual water survey to measure public perceptions about the value and financial mechanisms of our water and wastewater systems. Following the release of the 2015 BCWWA research report, *“Are Our Water Systems at Risk?”* which assessed the financial capacity of BC’s municipalities to maintain, renew and replace the existing water and wastewater infrastructure, we wanted to better understand how the public currently values water and wastewater services. The results of the survey would demonstrate if there was public appetite to implement the recommendations made in the *“Are Our Water Systems at Risk?”* report.

The results of the 2016 Ipsos survey reveal that many residents don’t know where their tap water comes from or where their wastewater goes, but they are confident in the systems and safety of their drinking water. The Ipsos survey also reveals that while many residents don’t have a clear understanding of how much they pay for these services each month, they place a higher price tag on access to clean, safe drinking water and safe wastewater removal than what they believe they are currently paying.

Survey respondents

More than 800 British Columbians participated in the Ipsos Reid telephone survey which featured 11 questions. The survey respondents included individuals from across Metro Vancouver, Vancouver Island, Northern BC and the Interior. Respondents represent all age, income and education levels and a balanced split between the genders.

Total	Gender		AGE			EDUCATION		
	Male	Female	18-34	35-54	55+	HS or less	Post Sec	Univ Grad
801	393 (49%)	408 (51%)	230 (29%)	288 (36%)	283 (35%)	188 (23%)	345 (43%)	268 (33%)

Metro Vancouver	Vancouver Island	North/Interior	<40k*	40k - <60K	60k - <100k	100k+	Kids	No Kids
422 (53%)	136 (17%)	243 (30%)	229 (29%)	120 (15%)	192 (24%)	172 (21%)	151 (19%)	650 (81%)

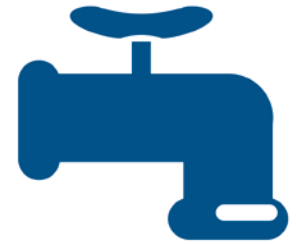
*Household income response optional

What the results told us

1. British Columbians need more information about where their water comes from and where their wastewater goes.
 - a. There is an opportunity to raise public awareness about the value of water as only 33% of residents know where their tap water comes from and only 24% know where their wastewater goes to. Further, 36% of those surveyed did not know how much they were paying for water and 39% did not know what they were paying for wastewater removal.
2. Despite a lack of awareness, British Columbians remain confident in our water and wastewater systems workforce and infrastructure, as well as the safety of our drinking water.
 - a. 84% of respondents are confident in the ability of BC's water infrastructure systems to deliver safe drinking water and 85% are confident in the people in BC working to provide that water. These numbers are up slightly from 2015, when infrastructure confidence was at 81% and confidence in people was at 83%.
 - b. 88% of respondents are confident that the water coming out of their tap is safe to drink. This up from 84% in 2015.
3. British Columbians place a higher value on water and wastewater services than they are currently being charged.
 - a. When asked what they think water and wastewater services are worth each month, respondents indicated a staggering \$175 per month!
 - b. Residents believe that they currently pay an average of \$122 per month for both services combined. In reality, the average household pays about \$500 a year or close to \$42 per month for water and wastewater services. (Environment Canada. (2011). 2011 Municipal Water Pricing Report: Municipal Water Pricing 2009 Statistics. Government of Canada.)

See Appendix A for detailed results.

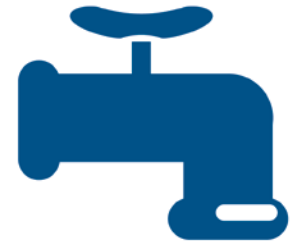
Appendix A – Ipsos Reid Annual Water Survey: 2016 Detailed Results



BCWWA

2016 Water Week Survey

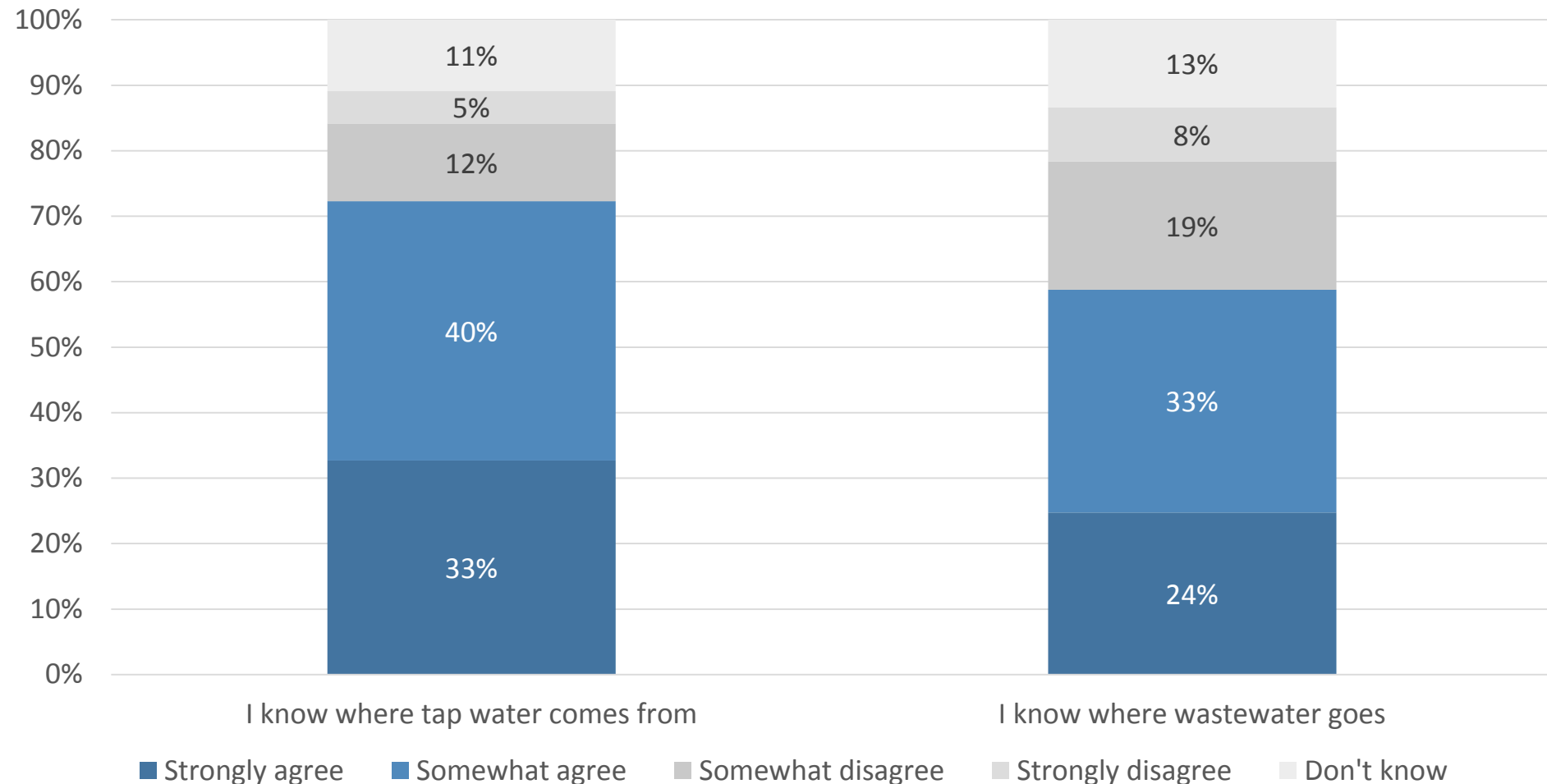
RESULTS



Awareness and confidence

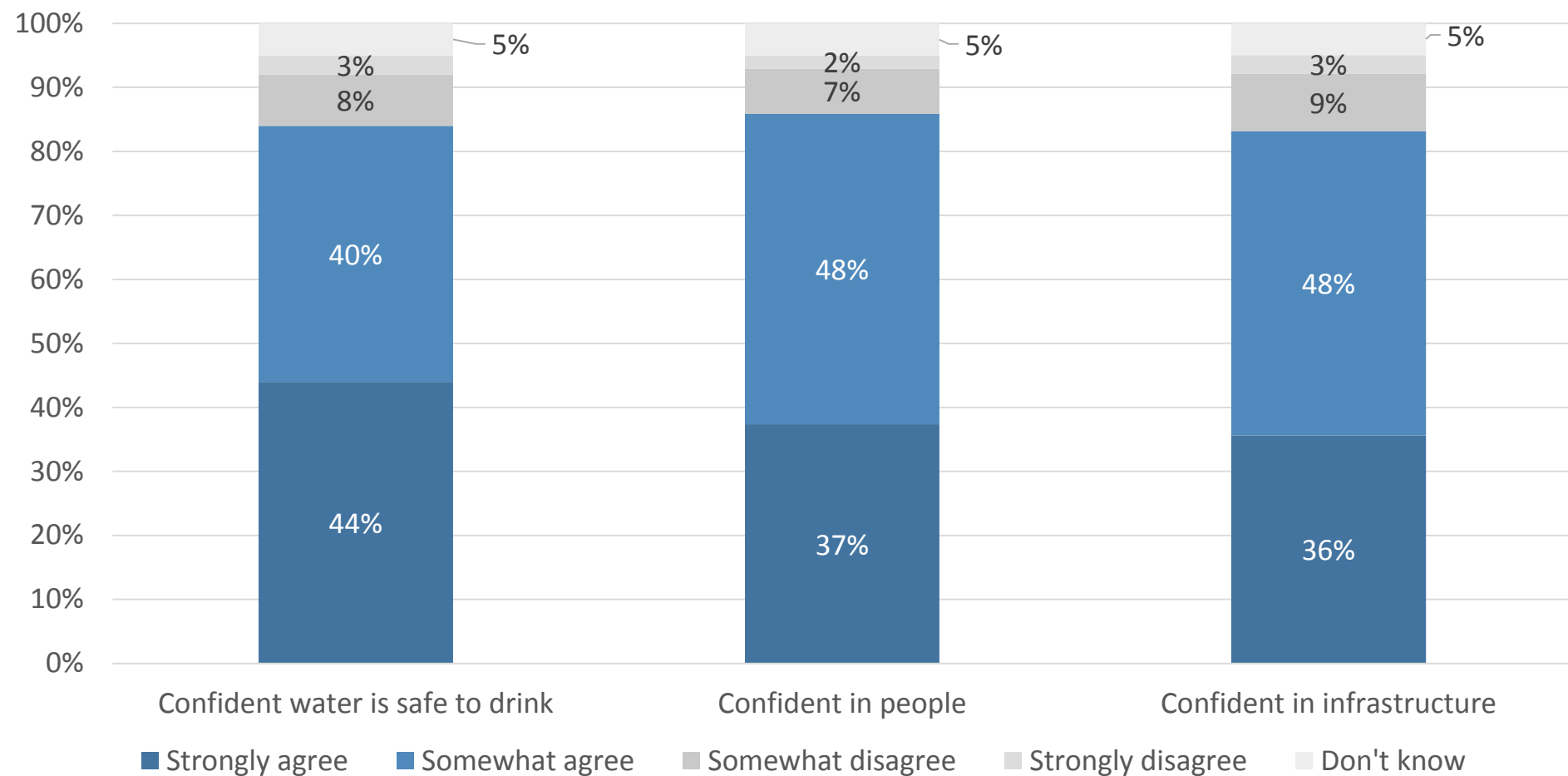
BC residents unclear where tap water comes from and where wastewater goes to

How strongly do you agree or disagree with each of the following statements?



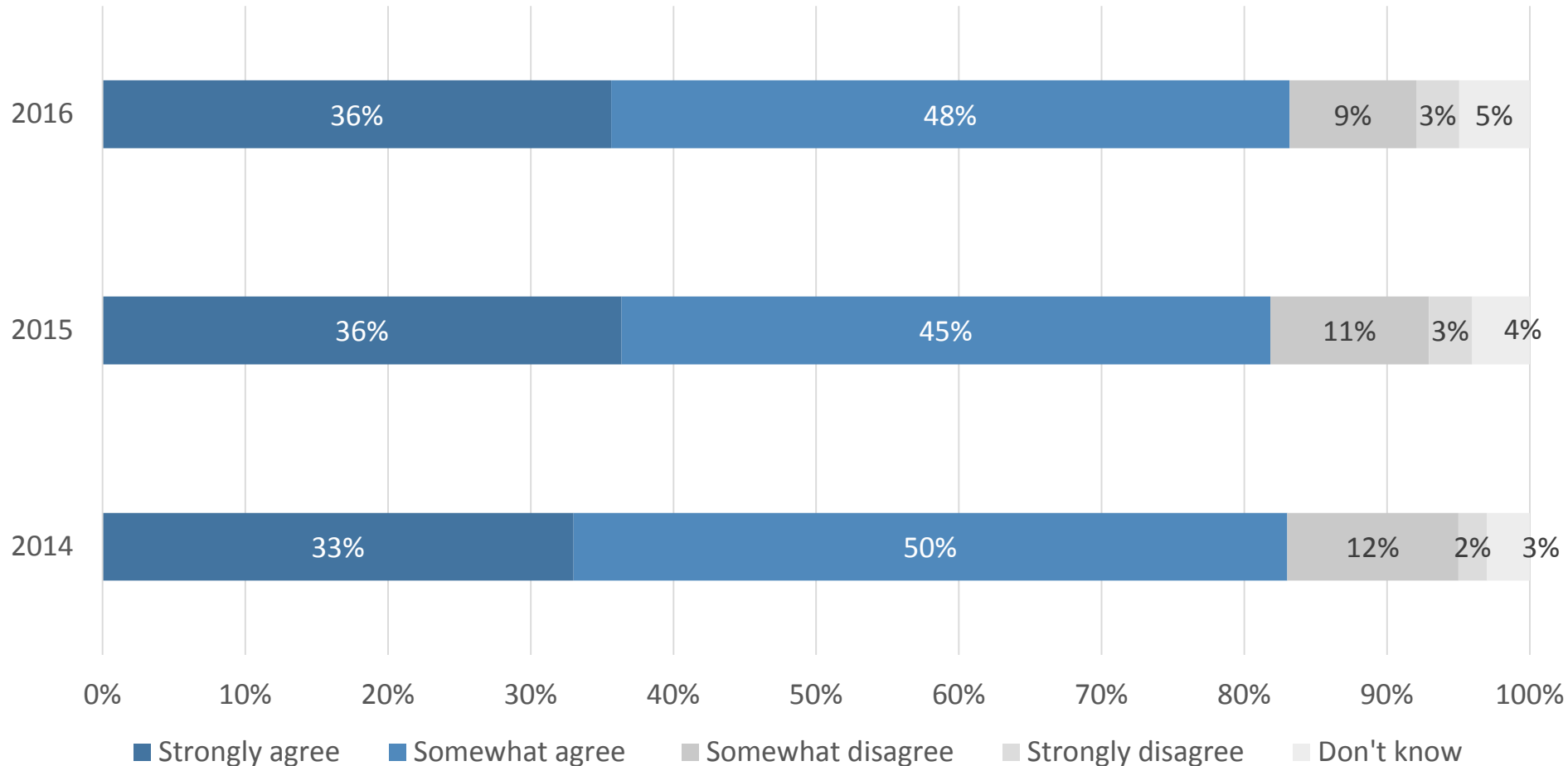
Yet, most are confident in water systems

How strongly do you agree or disagree with each of the following statements?



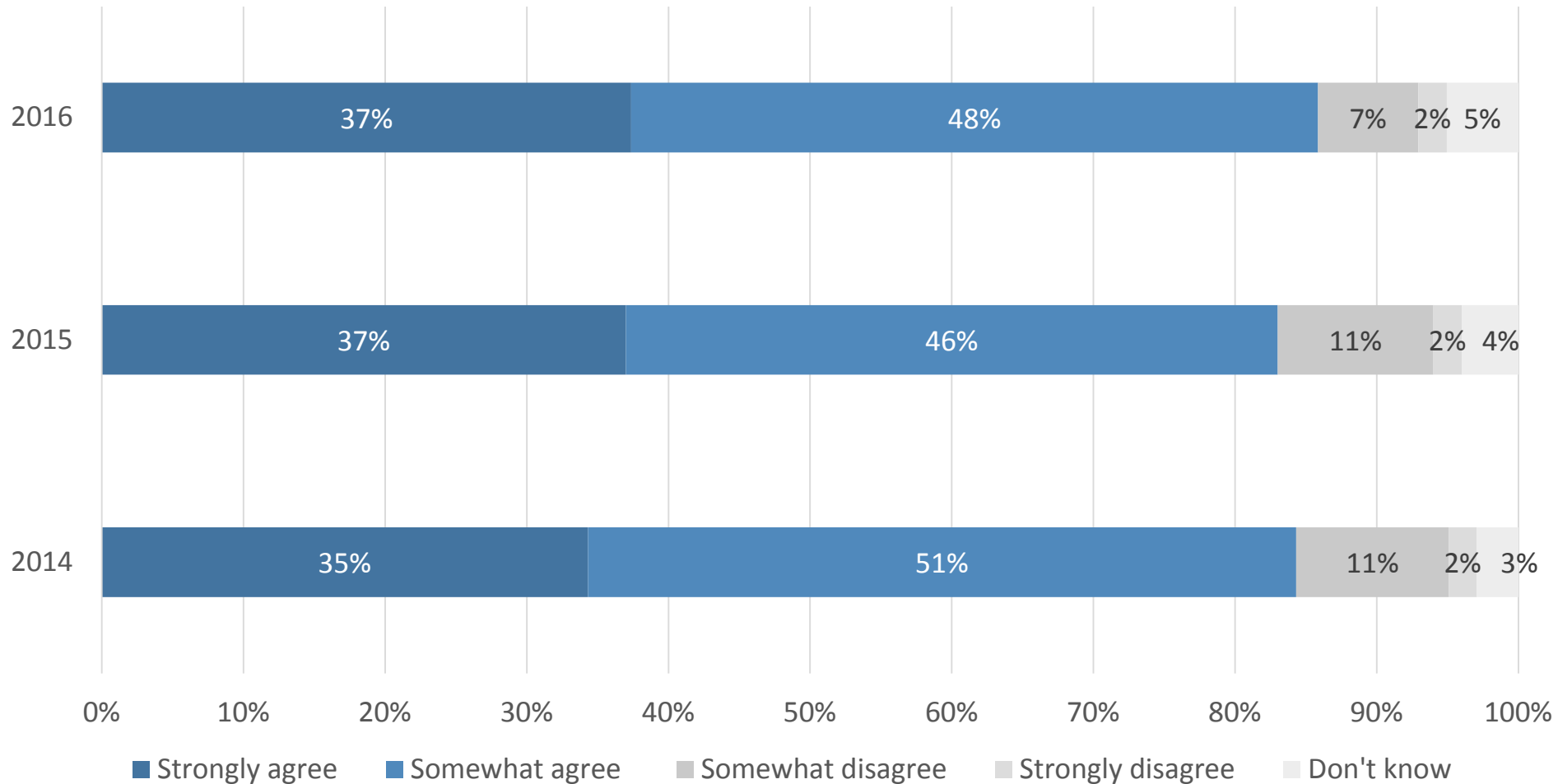
Confidence in infrastructure remains high

I am confident in the ability of BC's water infrastructure systems to provide safe drinking water



Confidence in industry personnel remains high

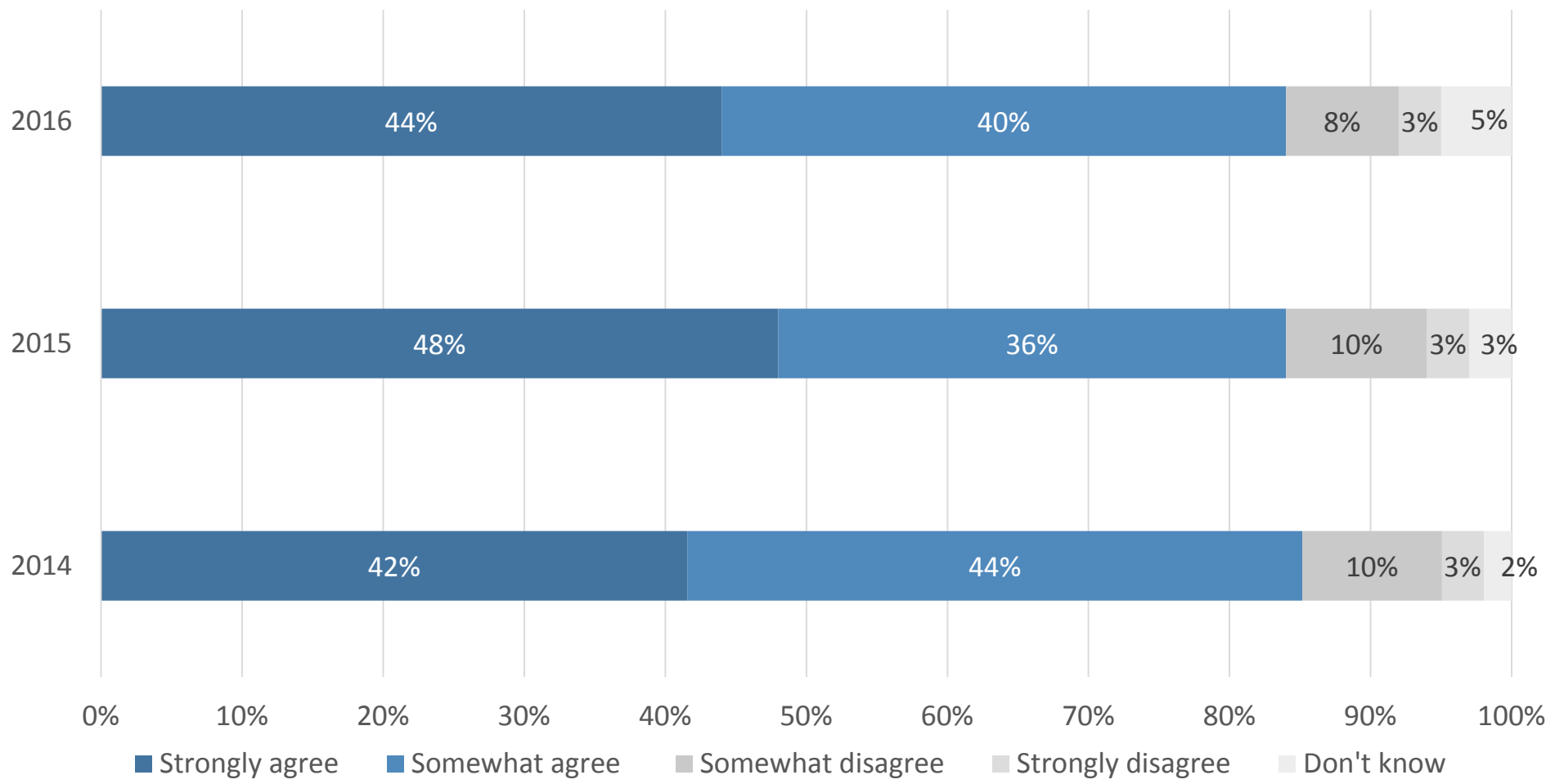
I am confident in the people in BC working to provide safe drinking water.





Confidence in overall drinking water safety remains high

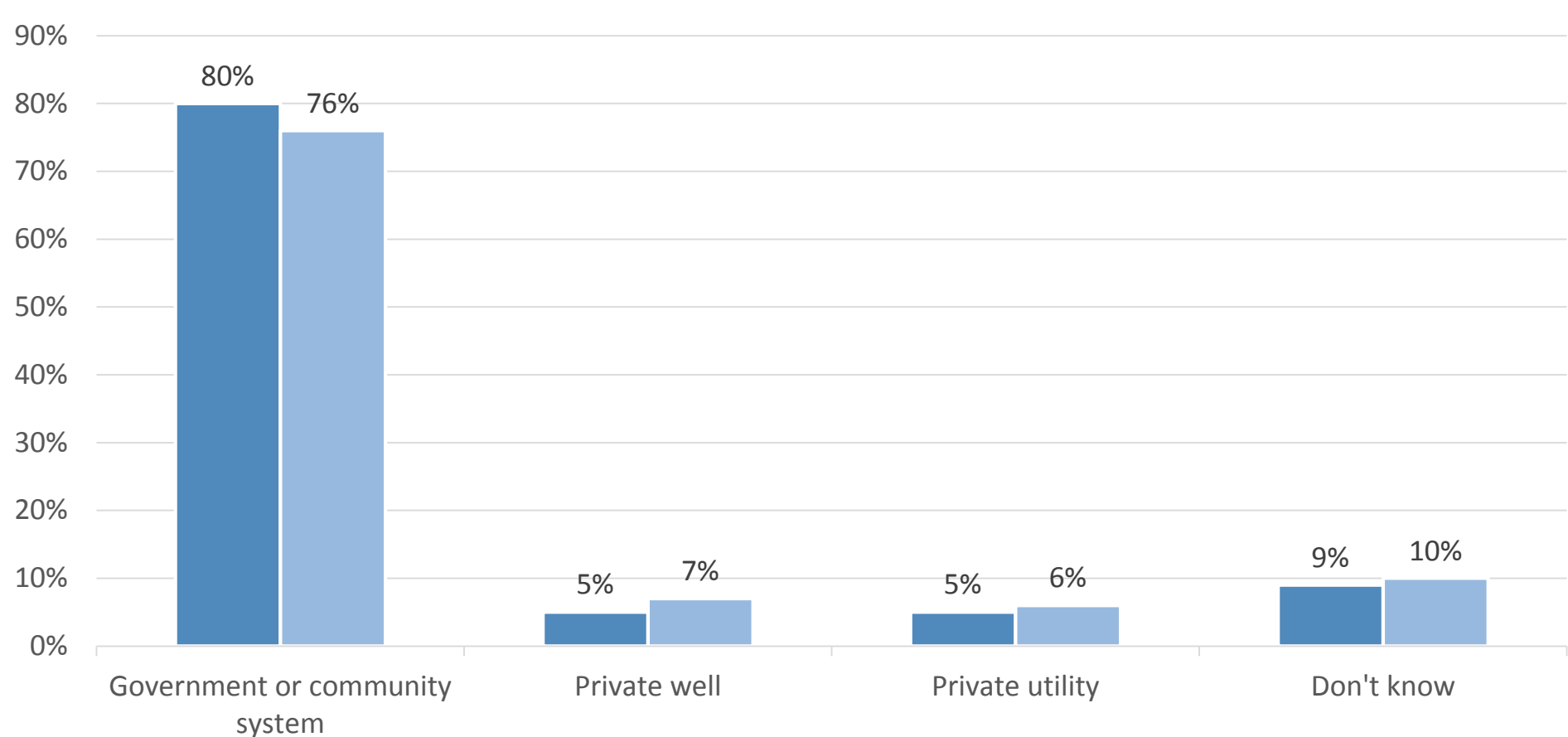
I am confident that the water coming out of my tap is safe to drink.



Most continue to rely on government or community system for water delivery

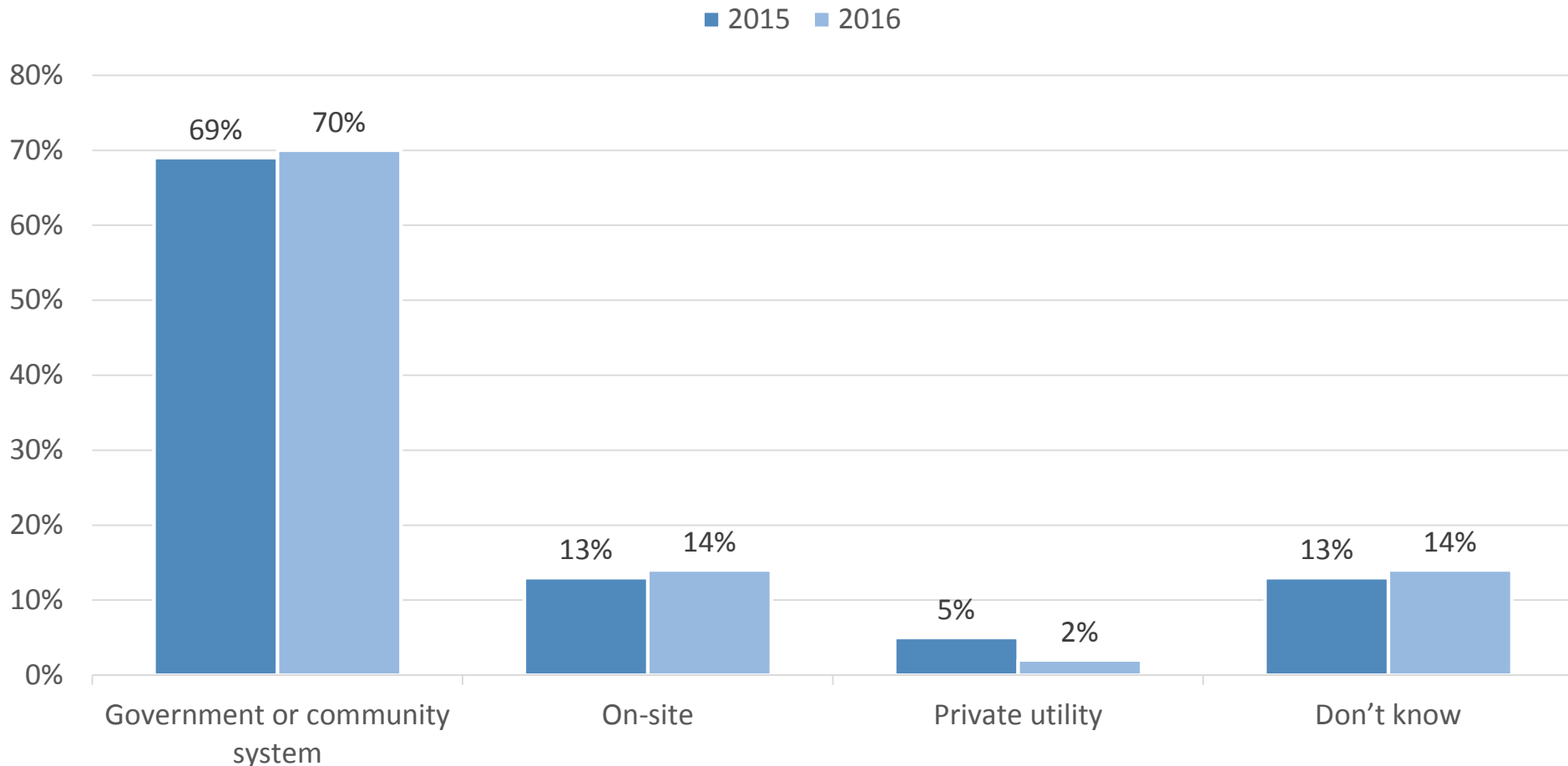
To the best of your knowledge, how is tap water supplied to your home?

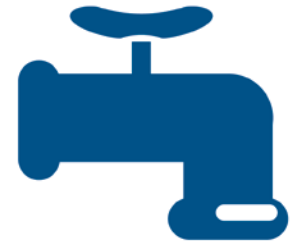
■ 2016 ■ 2015



Most continue to rely on government or community system for wastewater removal

To the best of your knowledge, how is wastewater/sewage removed from your home?



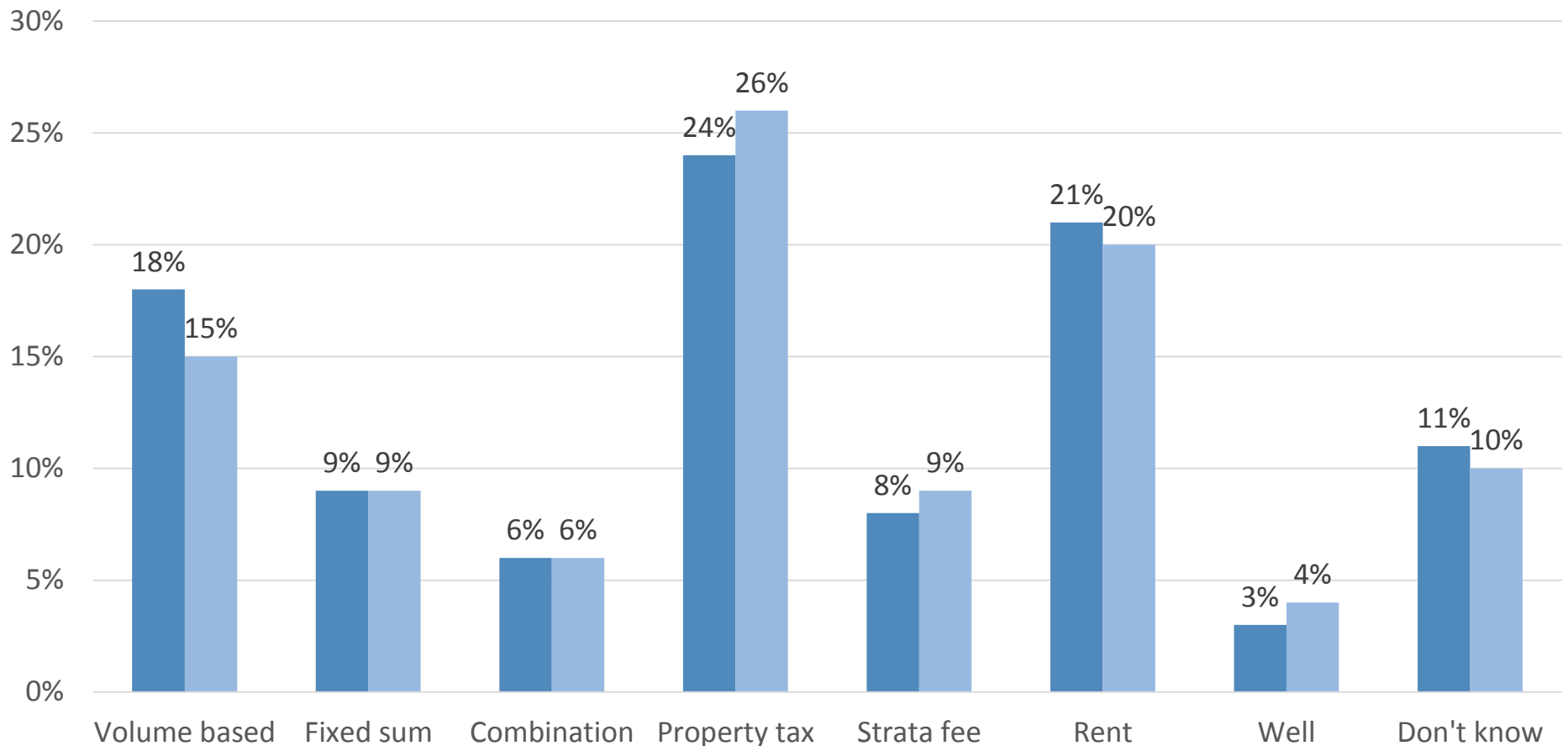


Value of water and wastewater services

Many residents pay for tap water services through property tax or rent

How do you currently pay for your tap water services?

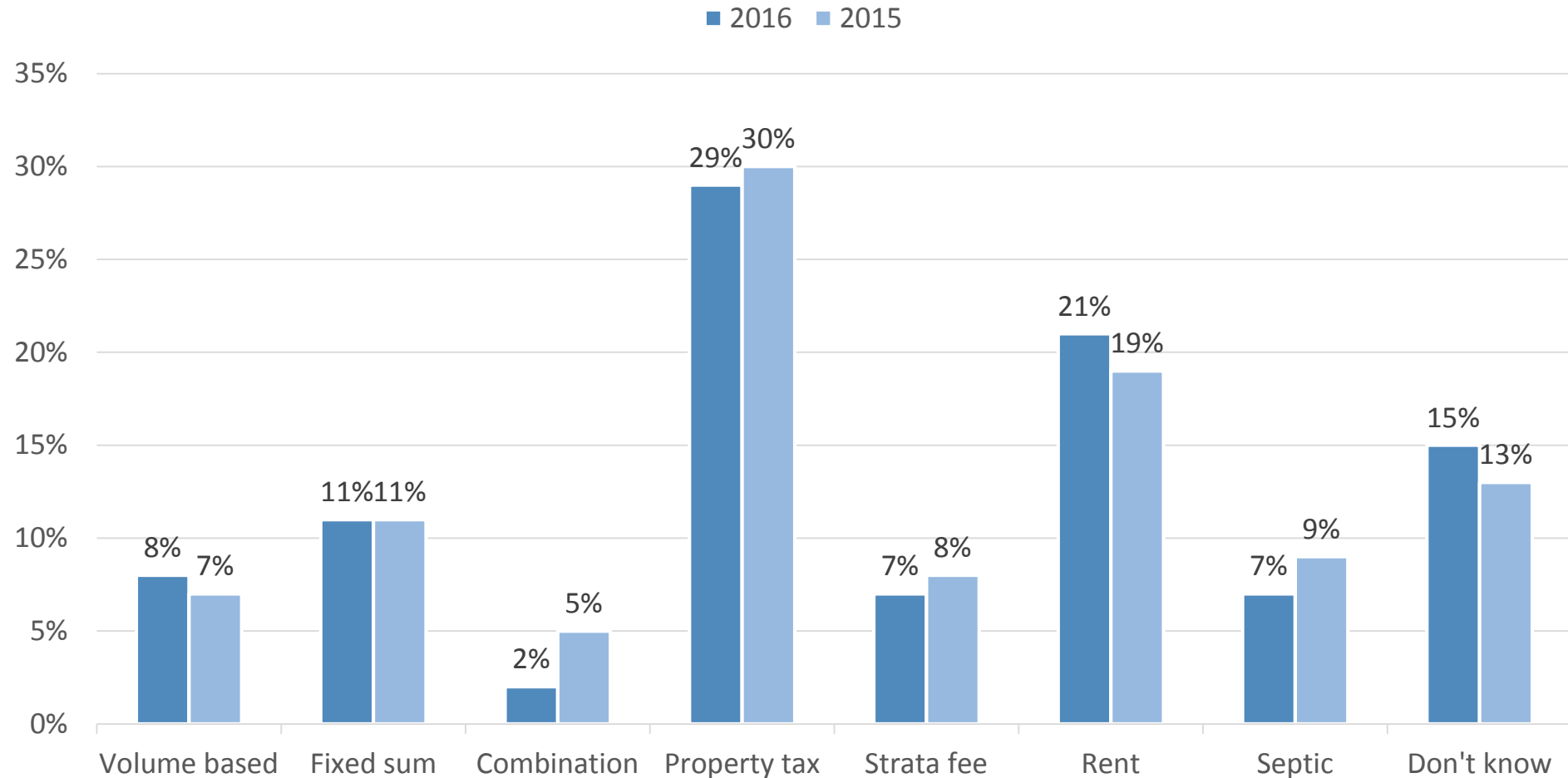
■ 2016 ■ 2015





Many residents pay for wastewater services through property tax or rent

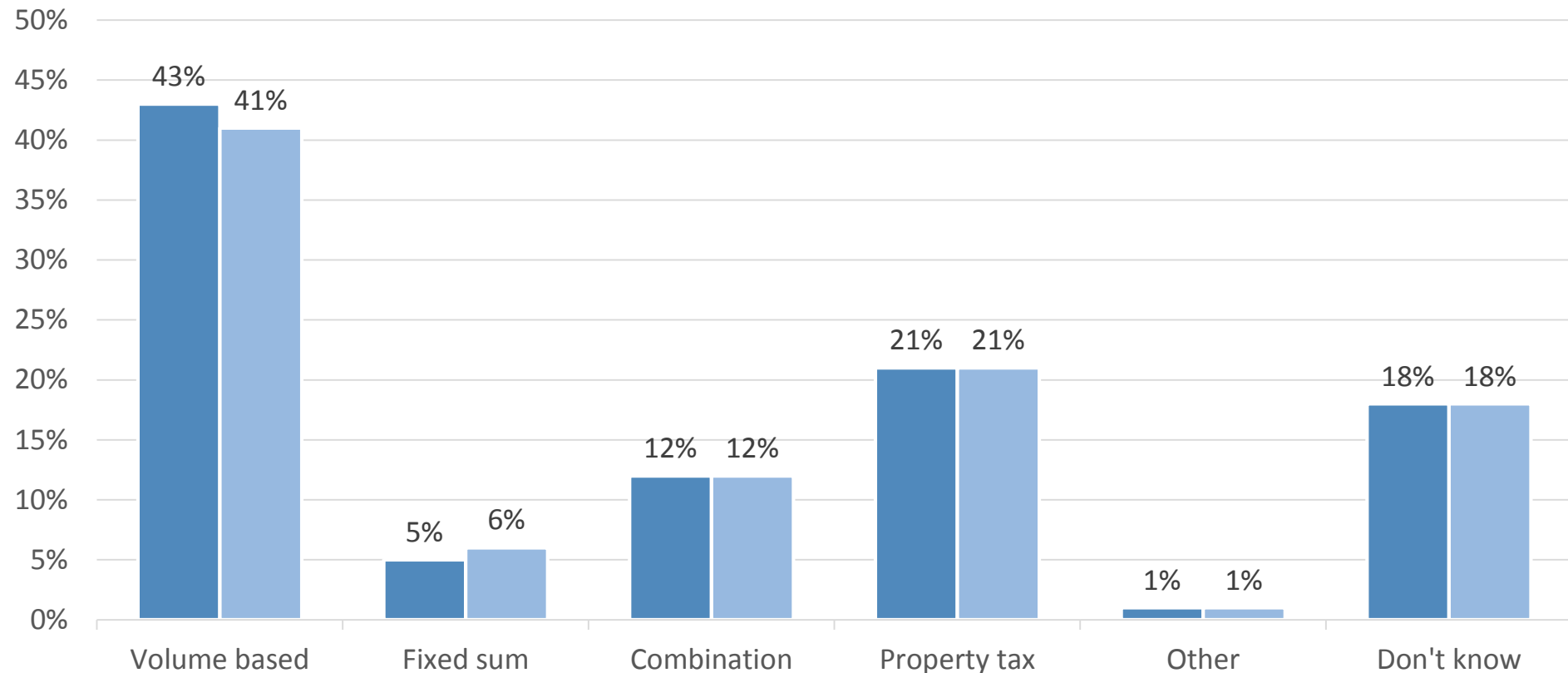
How do you currently pay for your sewer (wastewater) services?



Believe volume-based pricing best reflects value of water services

Which one of the following methods would be best to help consumers understand the relationship between the cost to provide water services and the price you pay for water?

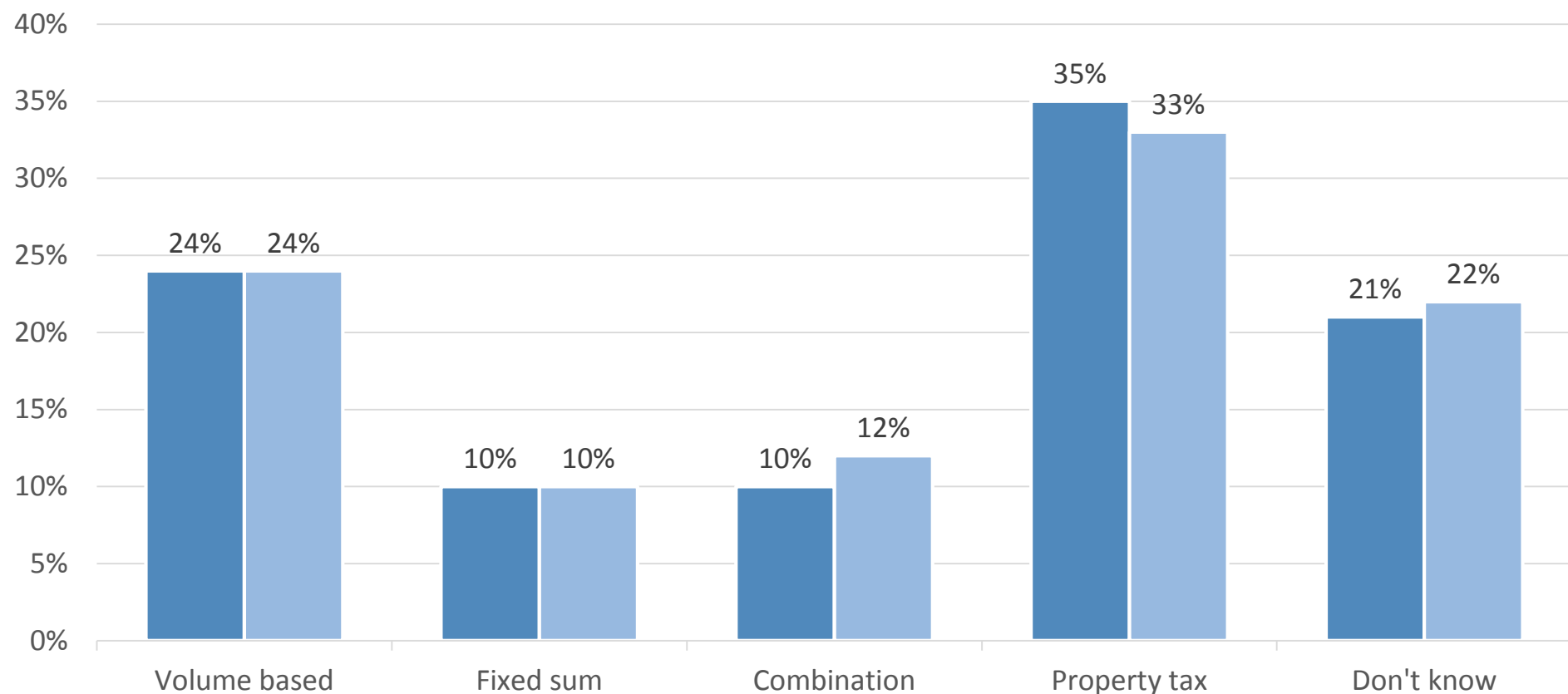
■ 2016 ■ 2015



Less certain how to best reflect value of wastewater services

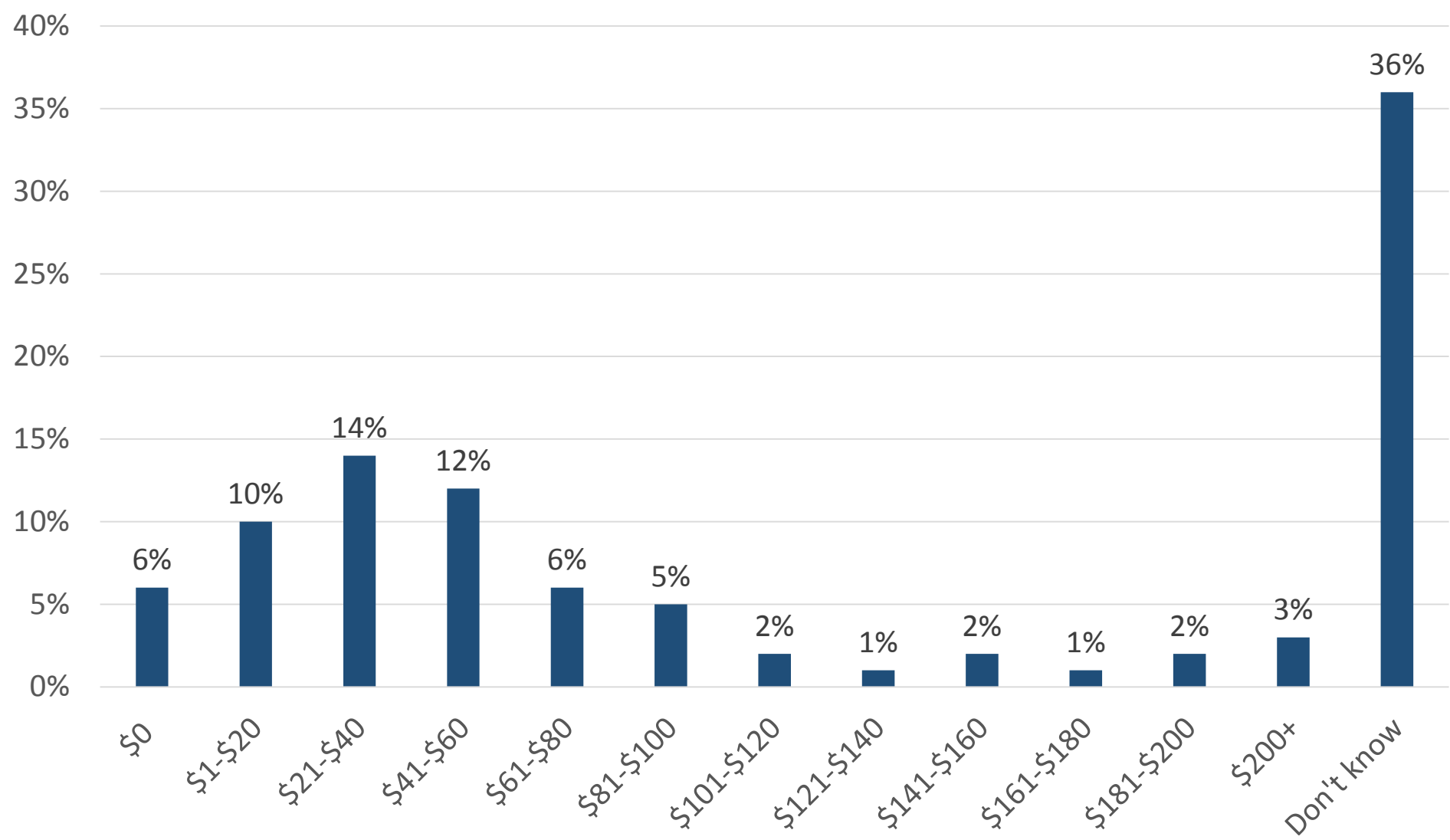
Which one of the following methods would be best to help consumers understand the relationship between the cost to provide sewer (wastewater) services and the price you pay for sewage disposal and treatment?

■ 2016 ■ 2015

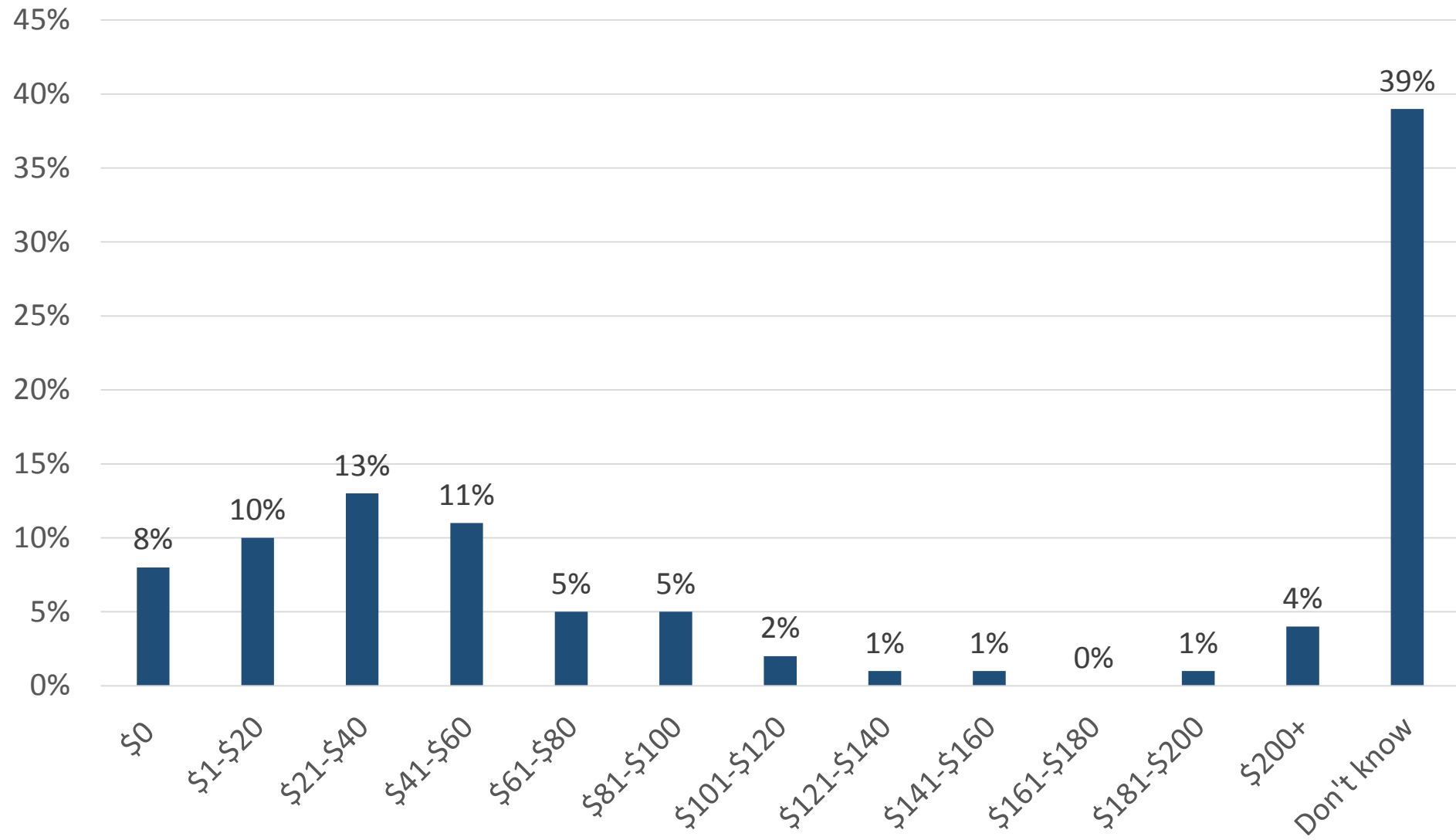




Many residents unsure of monthly water fees



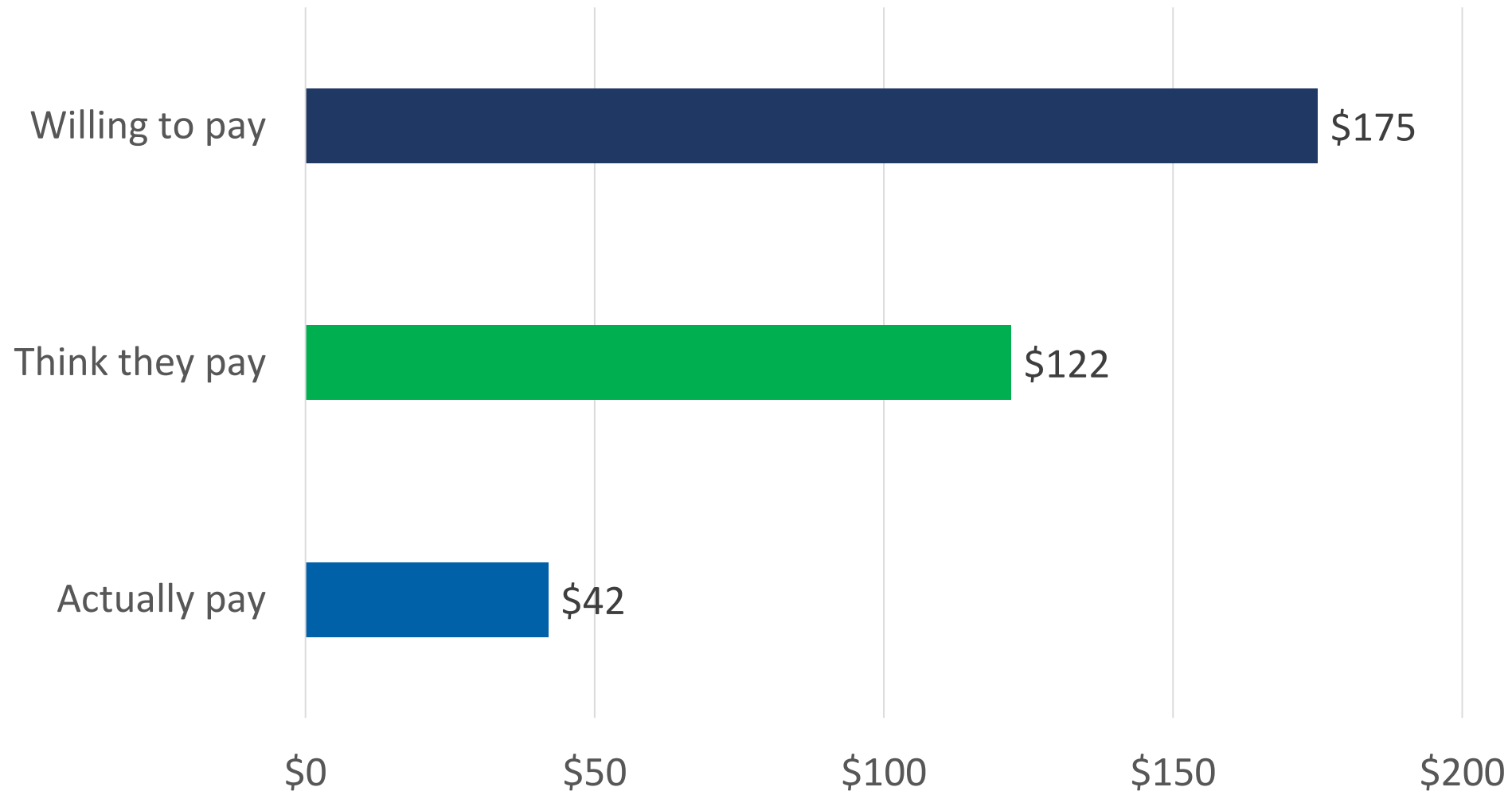
...and wastewater fees





Residents willing to pay more each month for water and wastewater services

■ Actually pay ■ Think they pay ■ Willing to pay

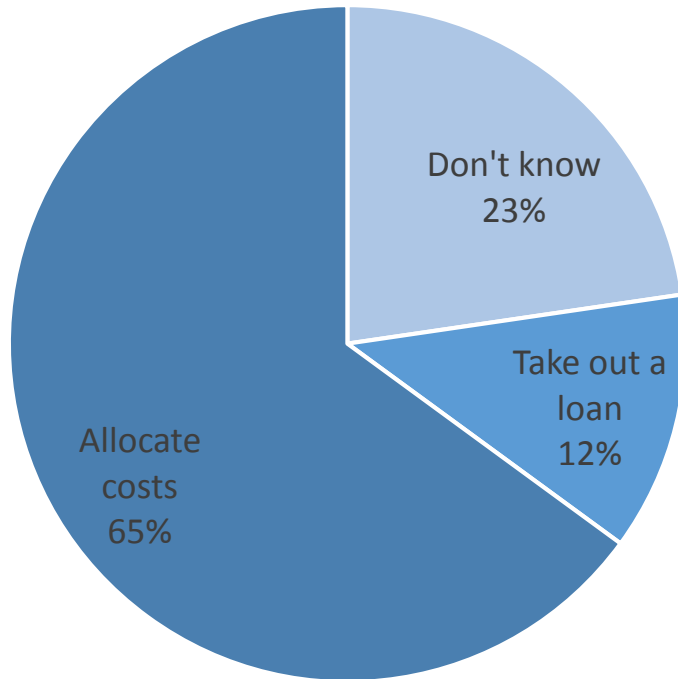




BC residents prefer to allocate fees today to pay for replacements tomorrow

How would you prefer to pay for upgrades or replacement costs for the systems to supply tap water to / remove sewage from your home?

Tap water



Wastewater

