



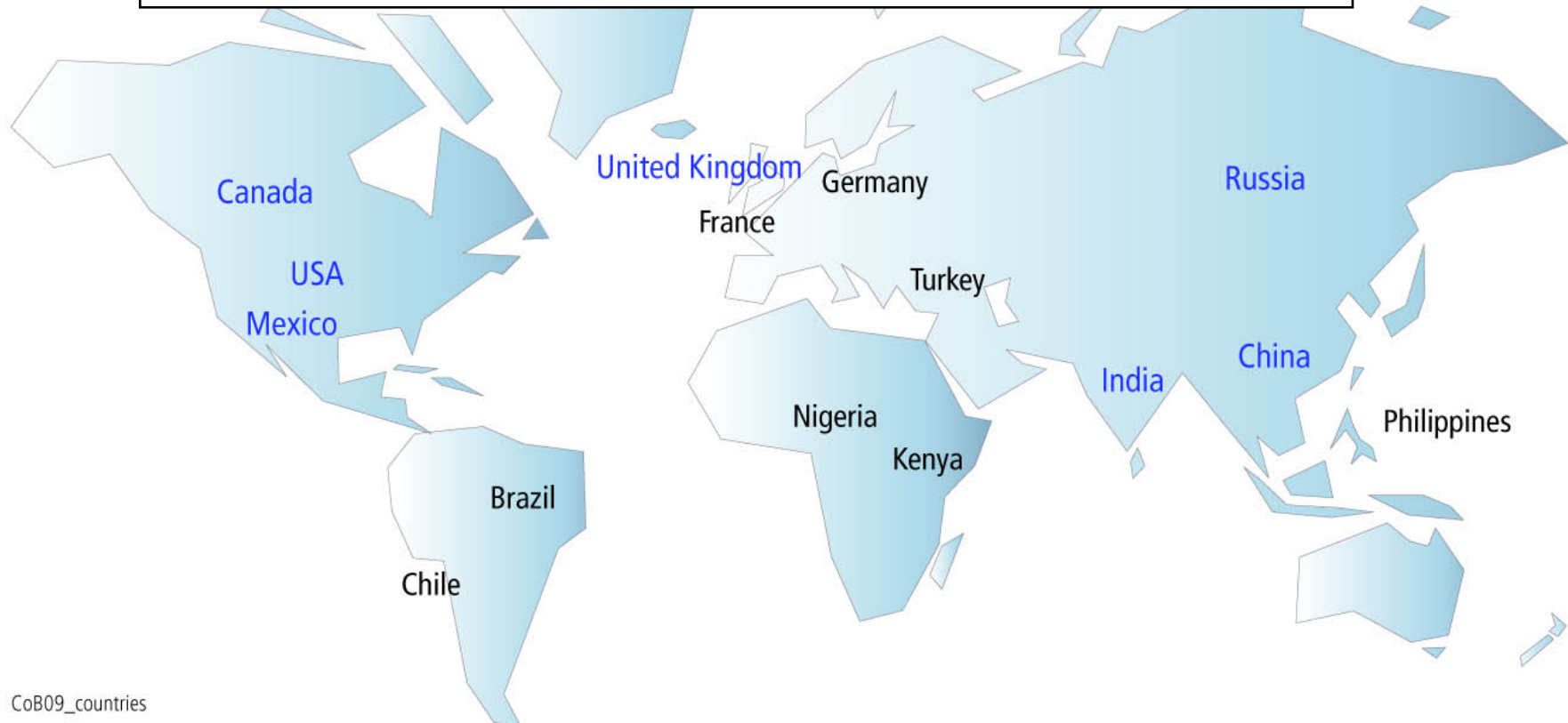
# Water Issues Research



# Methodology and Participating Countries (15)

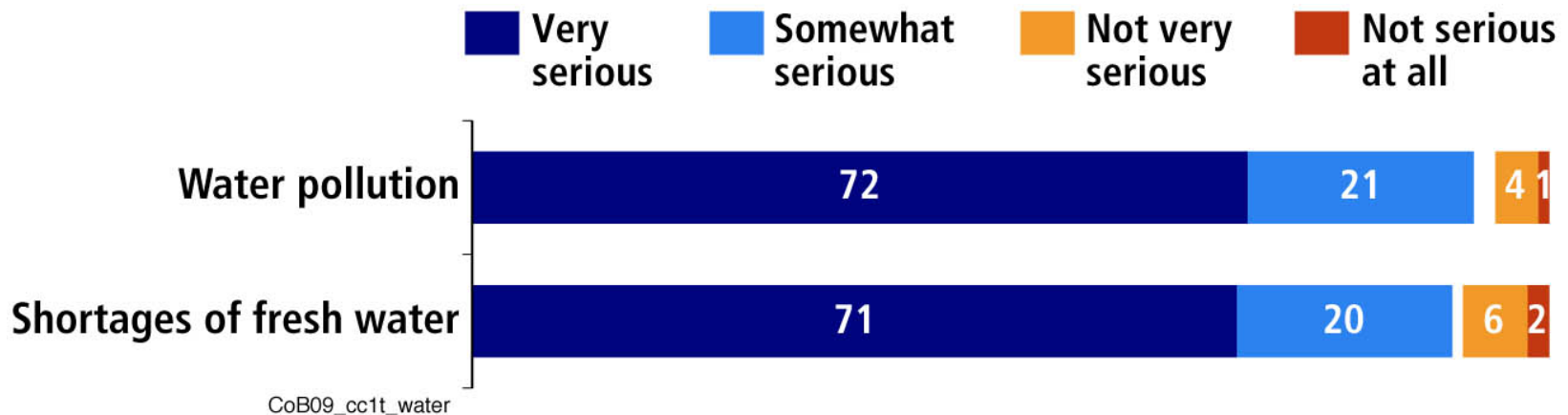


- Representative samples of 1,000 adults per country in 15 countries ( $n=32,000$ )
- Representative samples of 500 adults per country in 7 “deep dive” countries
- Some urban-only surveying in certain developing countries – surveys follow generally accepted research standards in each country
- Face-to-face and telephone interviewing between June 24, 2009 – August 3, 2009
- Within-country sample error of  $\pm 3.1\%$  to  $\pm 4.4\%$ , 19 times out of 20



# Seriousness of Water Problems

“Very Serious,” Average of 15 Countries, 2009



Note: Sample size  $n=1000$  in all countries  
The white space in this chart represents “DK/NA.”

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

# Rank Order: Seriousness of Water Problems

“Very Serious,” Average of 15 Countries, 2009

Rank	Environmental problem
1	Water pollution
2	Fresh water shortages
3	Depletion of natural resources**
4	Air pollution
5	Loss of animal/plant species
6	Climate change / global warming
7	Automobile emissions

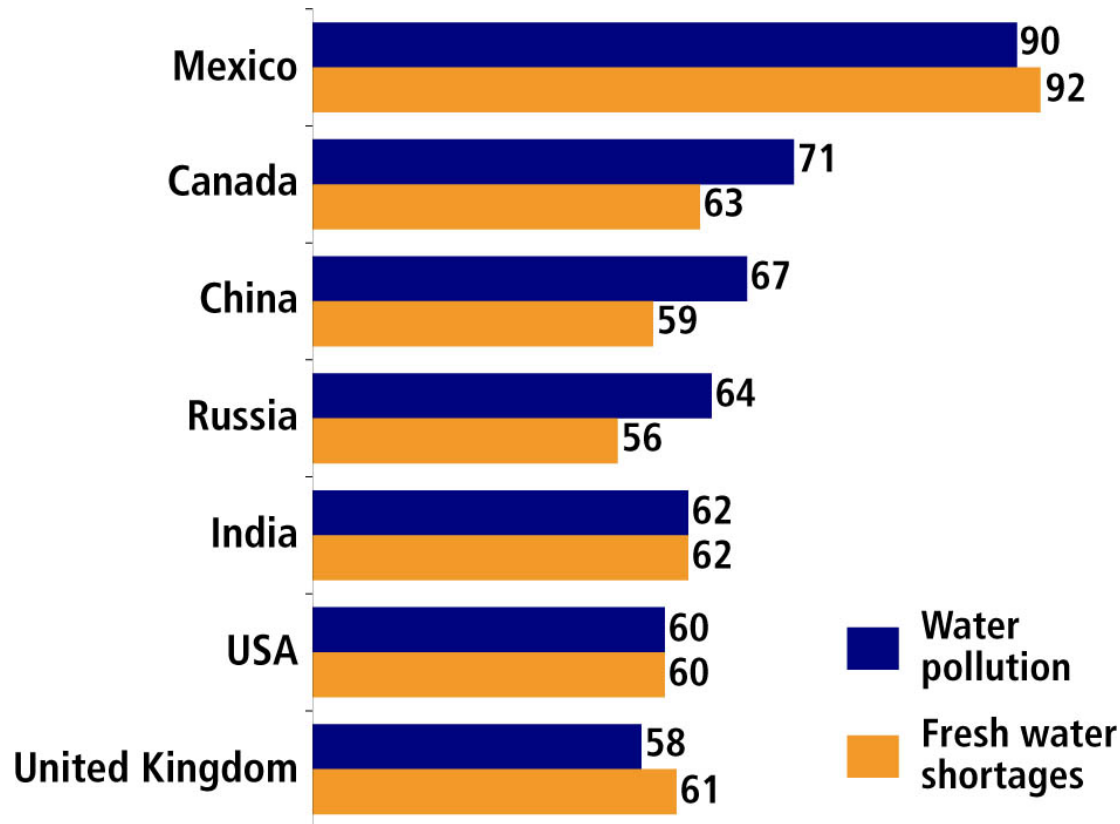
CoB09\_cc1t

Note: Sample size  $n=1000$  in all countries

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

# Seriousness of Water Problems

“Very Serious,” by Country, 2009



CoB09\_cc1t\_water\_cty

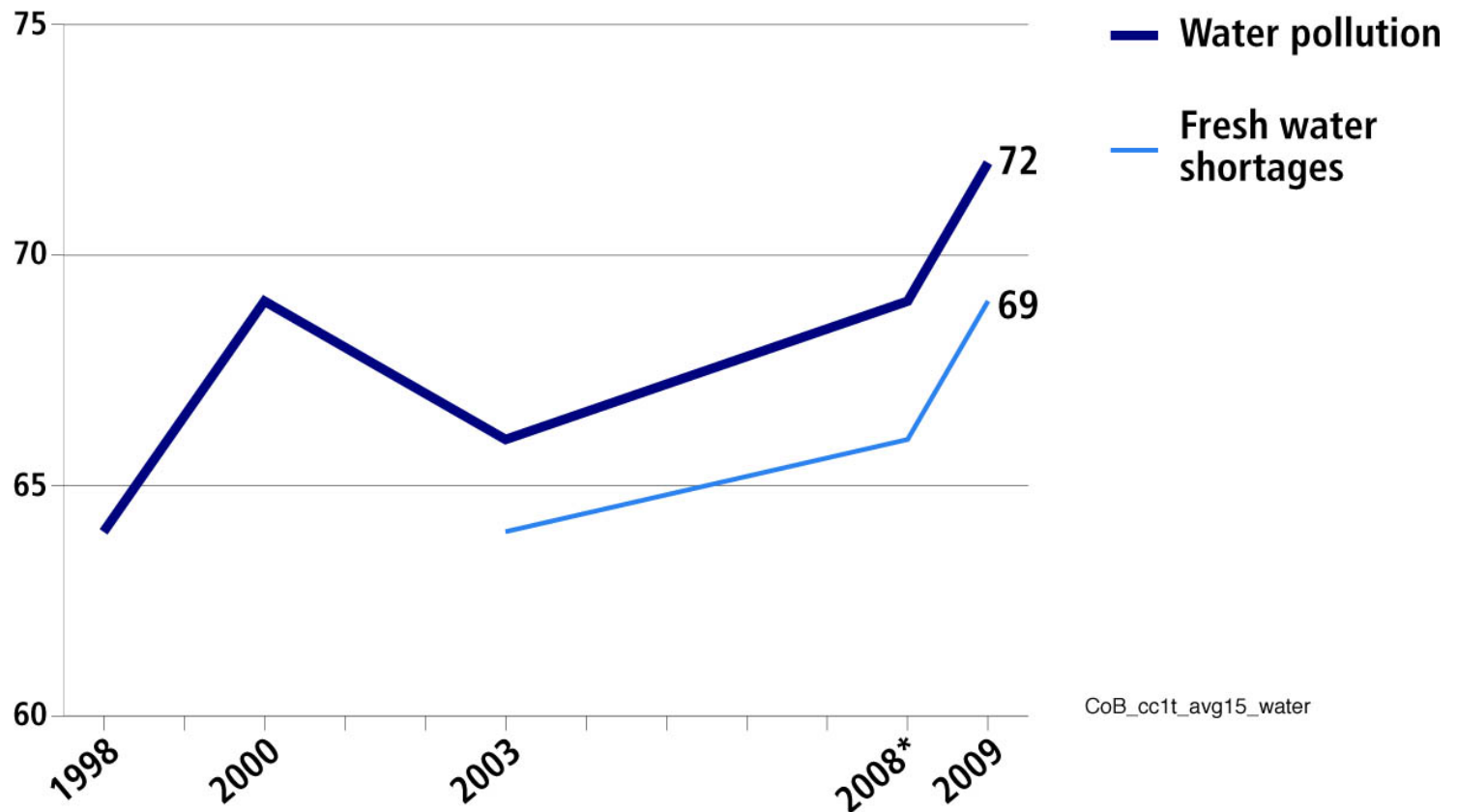
Note: Sample size  $n=1000$  in all countries

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

# Seriousness of Environmental Problems



“Very Serious,” Average of 11 Tracking Countries,\* 1998–2009



\*Asked of half of sample in 2008

\*\*Tracking countries include: Brazil, Canada, China, France, Germany, Mexico, Nigeria, Russia, Turkey, UK, USA..

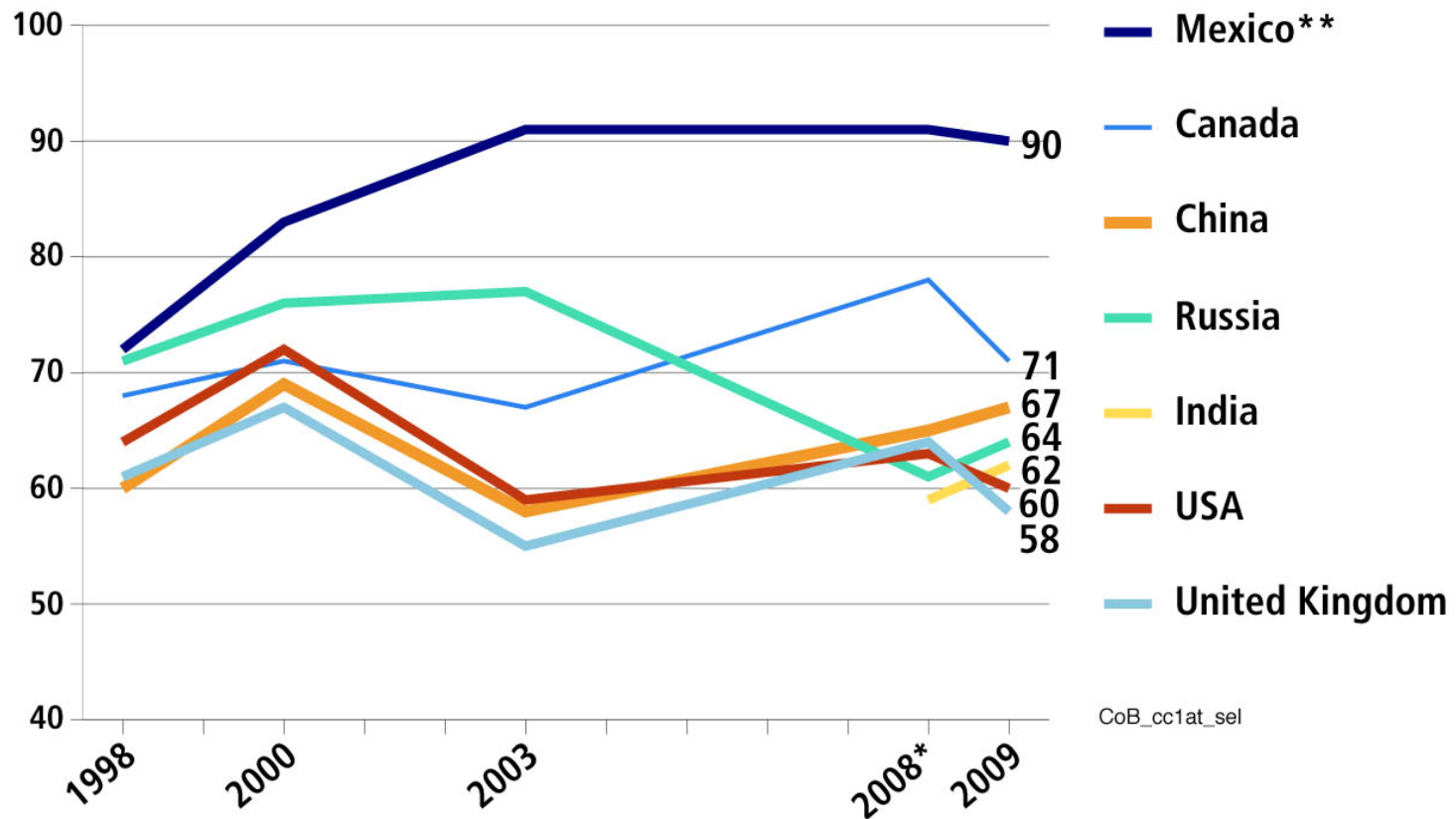
Note: Sample size  $n=1000$  in all countries; Mexico 2008–2009 national sample; 1998–2006 urban sample

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

GLOBESCAN

# Seriousness of Water Pollution

“Very Serious Problem,” Select Countries, 1998–2009



\*Asked of half of sample in 2008

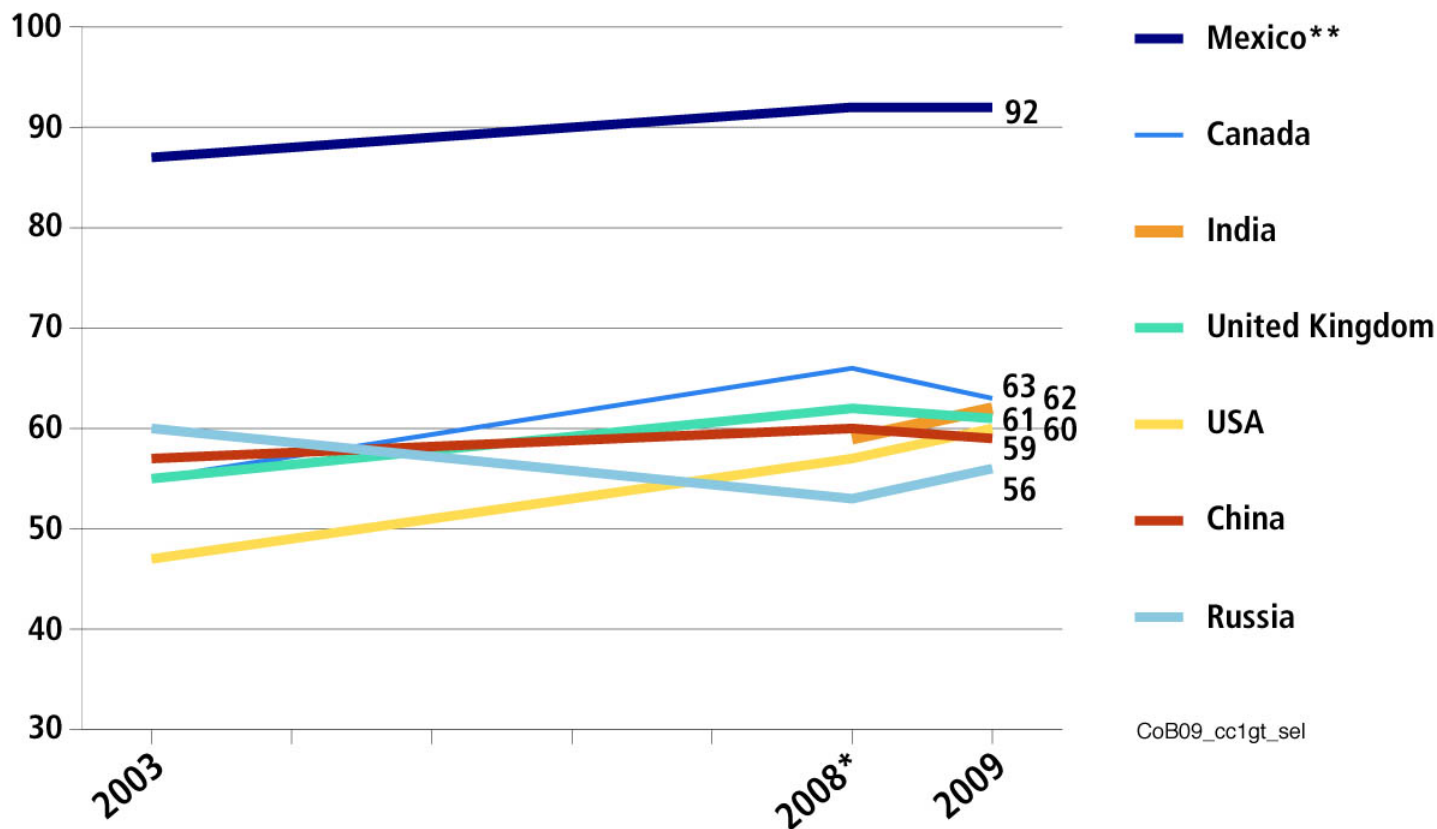
Note: Sample size  $n=1000$  in all countries; Mexico 2008–2009 national sample; 1998–2006 urban sample

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

# Seriousness of Fresh Water Shortages



“Very Serious Problem,” Select Countries, 1998–2009



\*Asked of half of sample in 2008

\*\* 2008–2009 national sample; 1998–2006 urban sample

Note: Sample size  $n=1000$  in all countries; Mexico 2008–2009 national sample; 1998–2006 urban sample

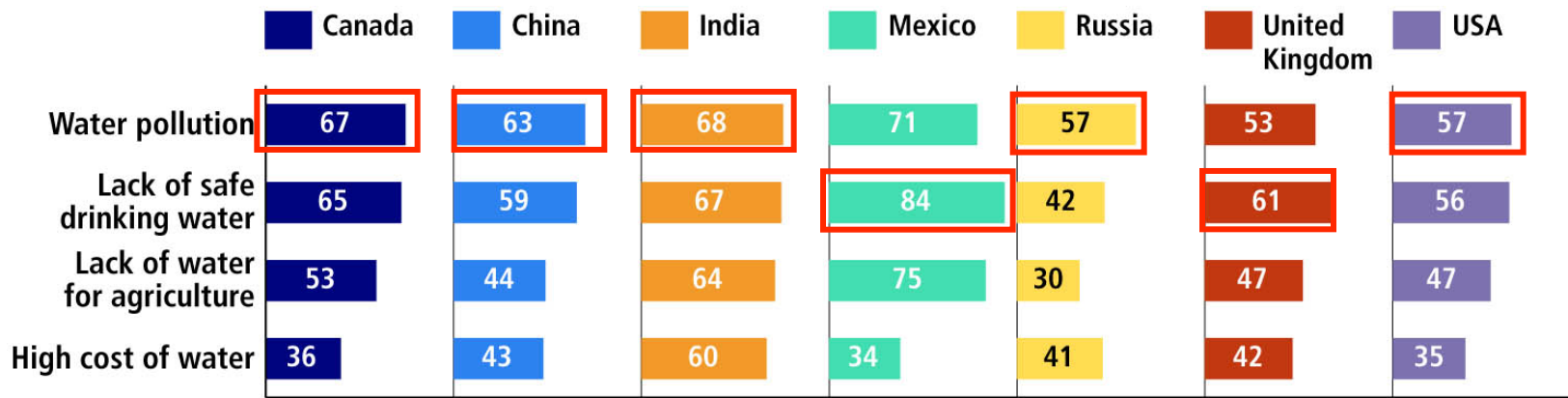
1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?





# Concern for Concern for Water Issues

“Very Concerned,” by Country, 2009



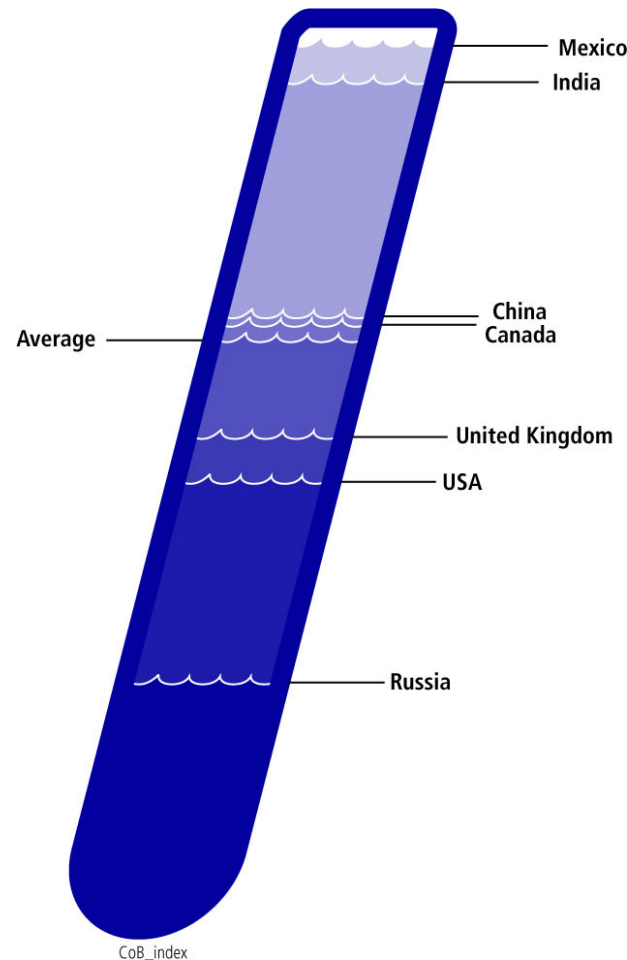
CoB09\_1\_sbs

Note: Sample size  $n=500$  in all countries

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

# Water Concern Index

## By Country, 2009



An index score measuring concern about water issues is computed by aggregating the concerns expressed about each of the four prompted water issues:

- water pollution
- lack of safe drinking water
- lack of water for agriculture
- high cost of water.

The average score by country is used to illustrate the relative positioning of countries in terms of concern for water issues.

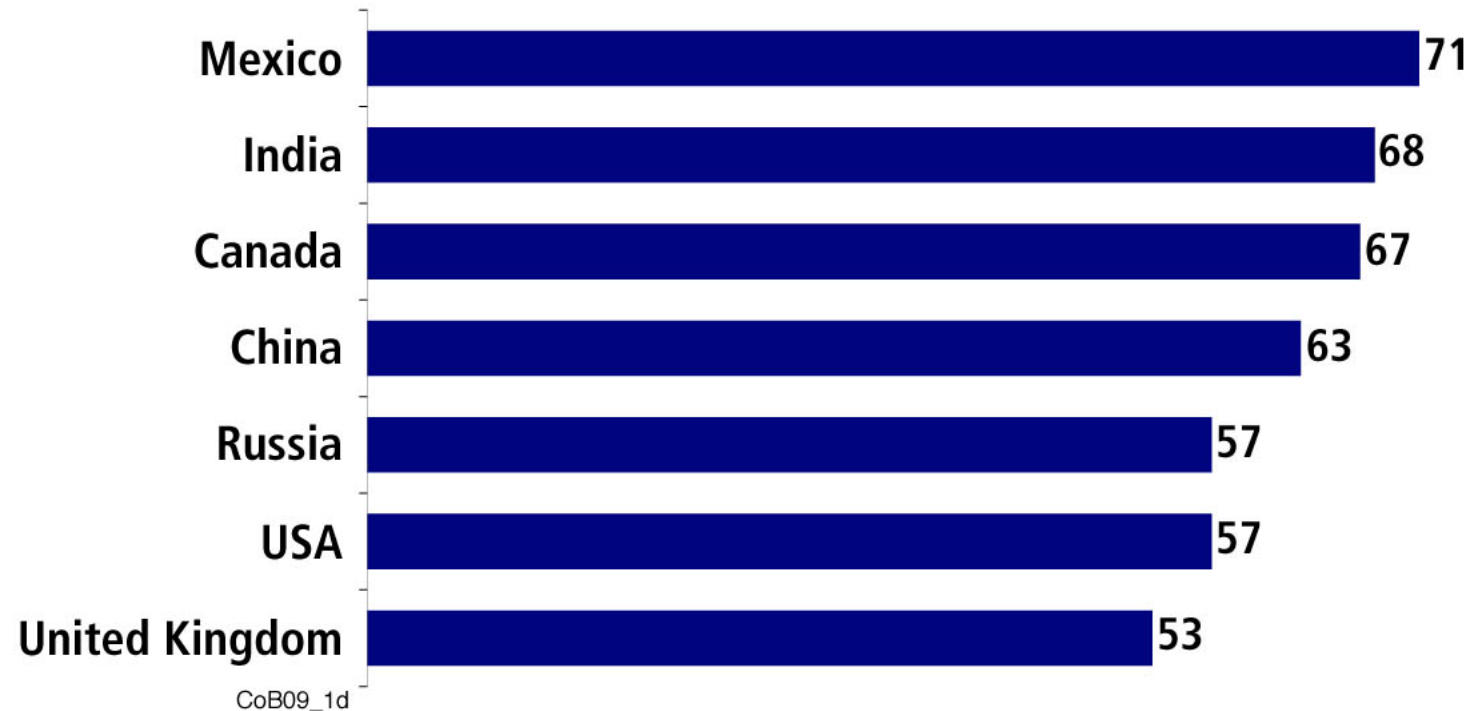
Note: Sample size  $n=500$  in all countries

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?

# Concern for Water Pollution



“Very Concerned,” by Country, 2009



Note: Sample size  $n=500$  in all countries

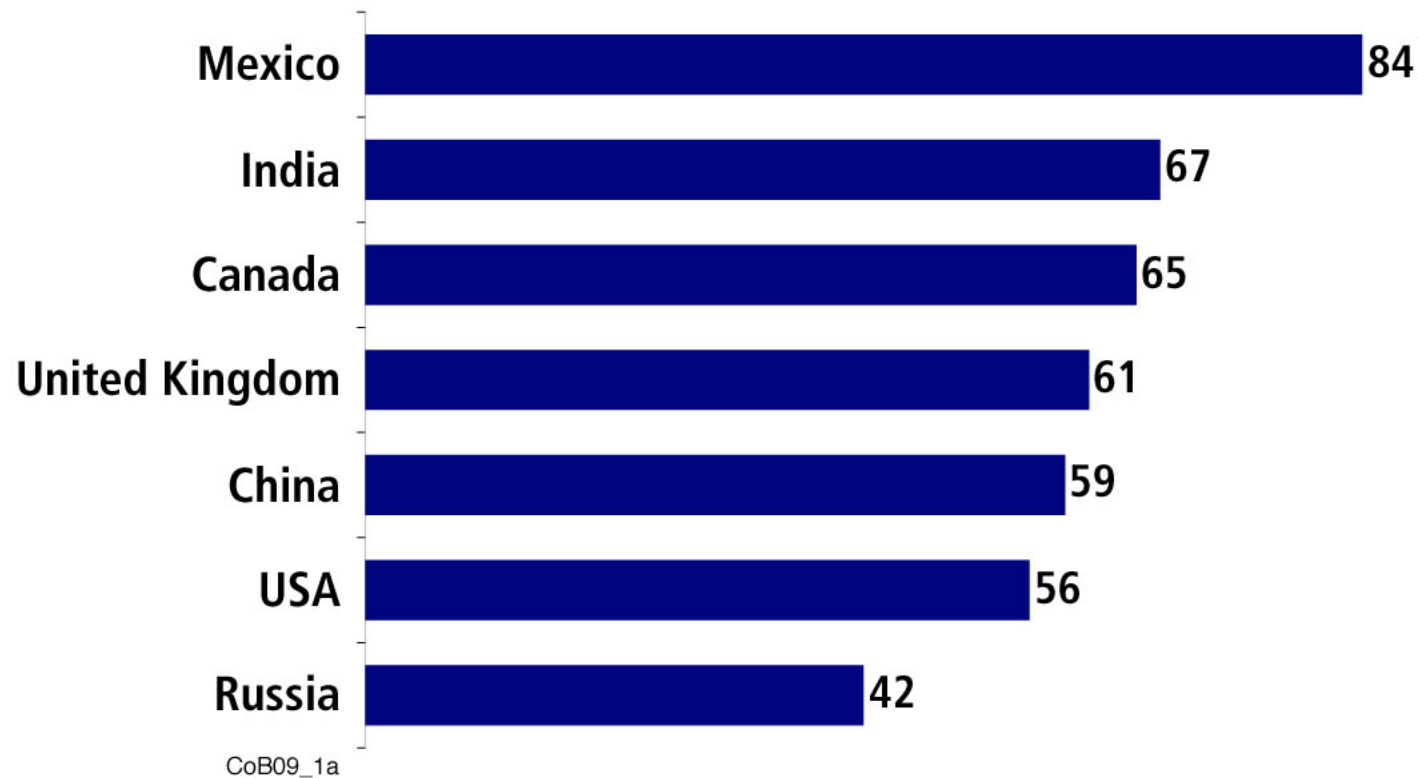
1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues? dt. Polluted water.



# Concern for Lack of Safe Drinking Water



“Very Concerned,” by Country, 2009



Note: Sample size  $n=500$  in all countries

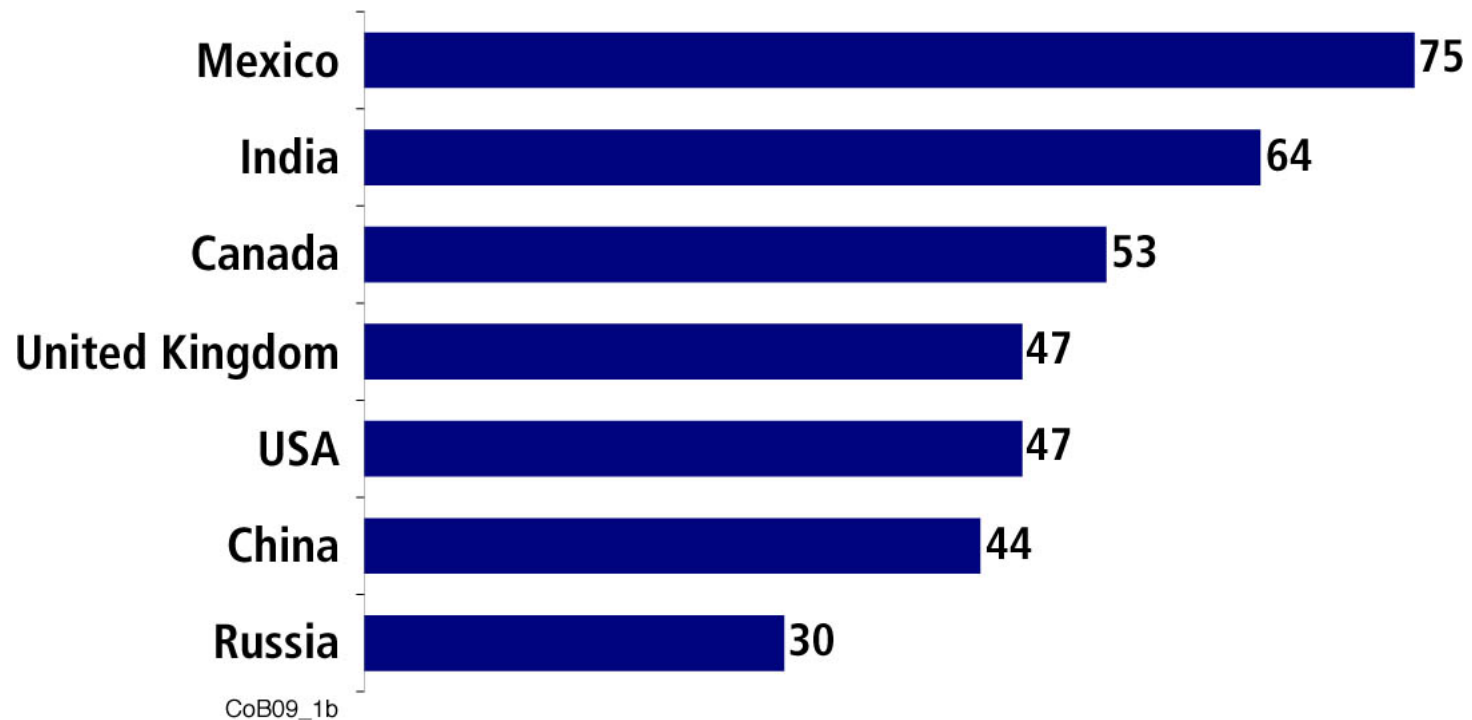
1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues? at. Lack of safe drinking water.



# Concern for Lack of Water for Agriculture



“Very Concerned,” by Country, 2009



Note: Sample size  $n=500$  in all countries

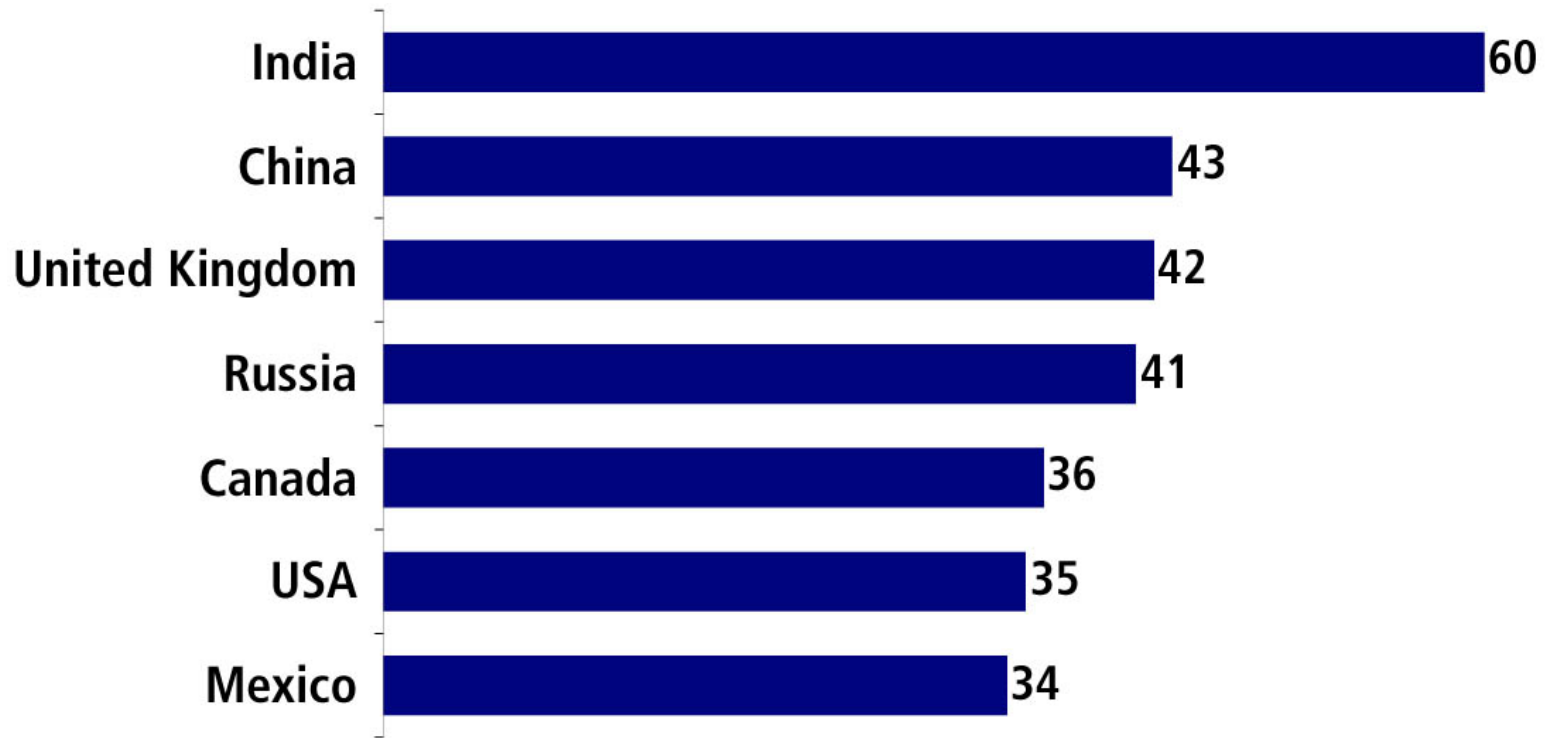
1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues? bt. Lack of water for agriculture.



# Concern for the High Cost of Water



“Very Concerned,” by Country, 2009



CoB09\_1c

Note: Sample size  $n=500$  in all countries

1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues? ct. The high cost of water.



# Responsible for Ensuring Clean Water



“Responsible (4+5),” by Country, 2009

	Canada	China	India	Mexico	Russia	United Kingdom	USA
Government	70	66	53	93	65	68	67
Water companies	65	61	42	79	79	80	70
Large companies	65	52	44	74	62	60	59
Citizens	55	30	41	76	53	43	54
Farmers	45	20	33	75	53	43	43
NGOs	35	24	27	42	47	29	37

CoB09\_2\_tbl

 Most responsible

Note: Sample size  $n=500$  in all countries

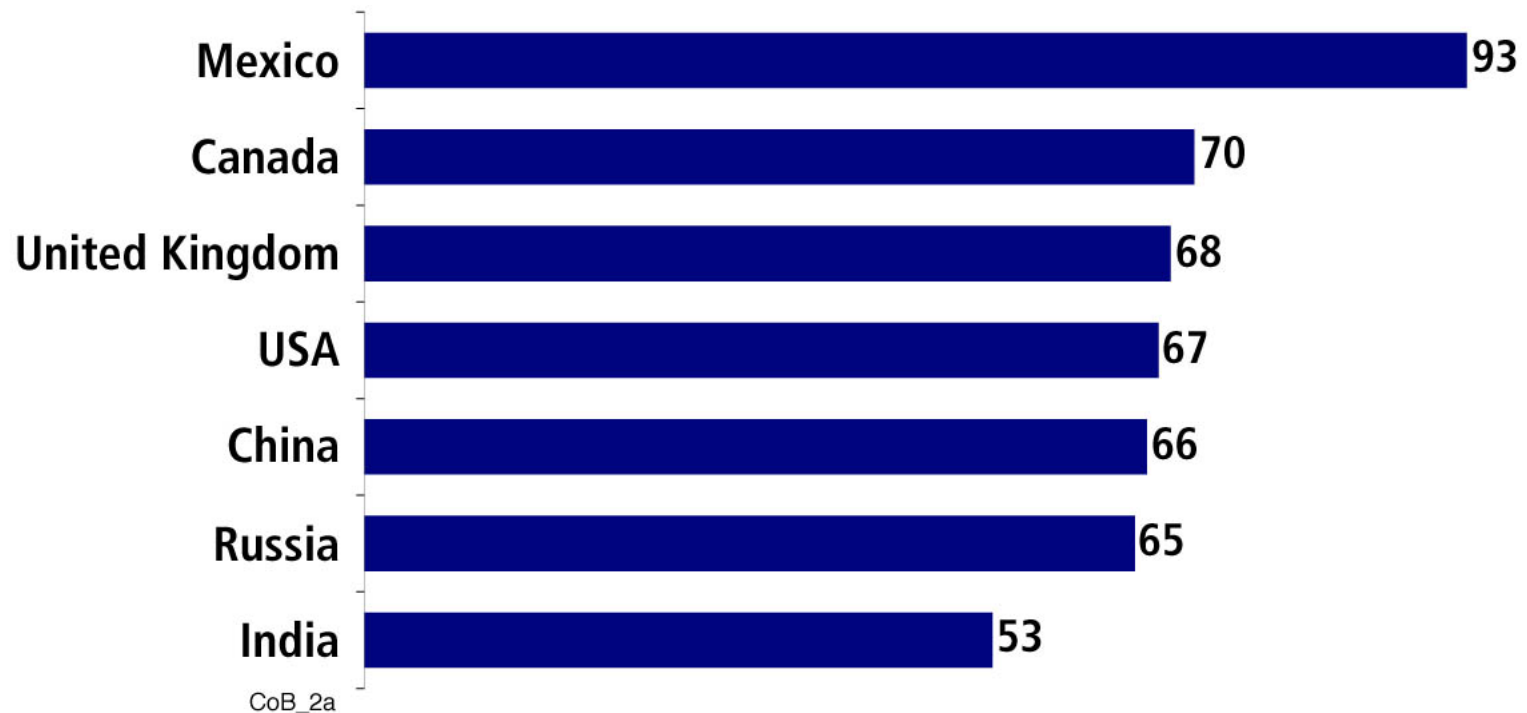
2. To what extent do you hold each of the following responsible for ensuring the availability of clean water for your community? Please use a scale of 1 to 5, where 1 means “not at all responsible” and 5 means “completely responsible.”



# Government Is Responsible for Ensuring Clean Water



“Responsible (4+5),” by Country, 2009



Note: Sample size  $n=500$  in all countries

2. To what extent do you hold each of the following responsible for ensuring the availability of clean water for your community? Please use a scale of 1 to 5, where 1 means “not at all responsible” and 5 means “completely responsible.” a. Government





# Large Companies Are Responsible for Ensuring Clean Water



“Responsible (4+5),” by Country, 2009



Note: Sample size  $n=500$  in all countries

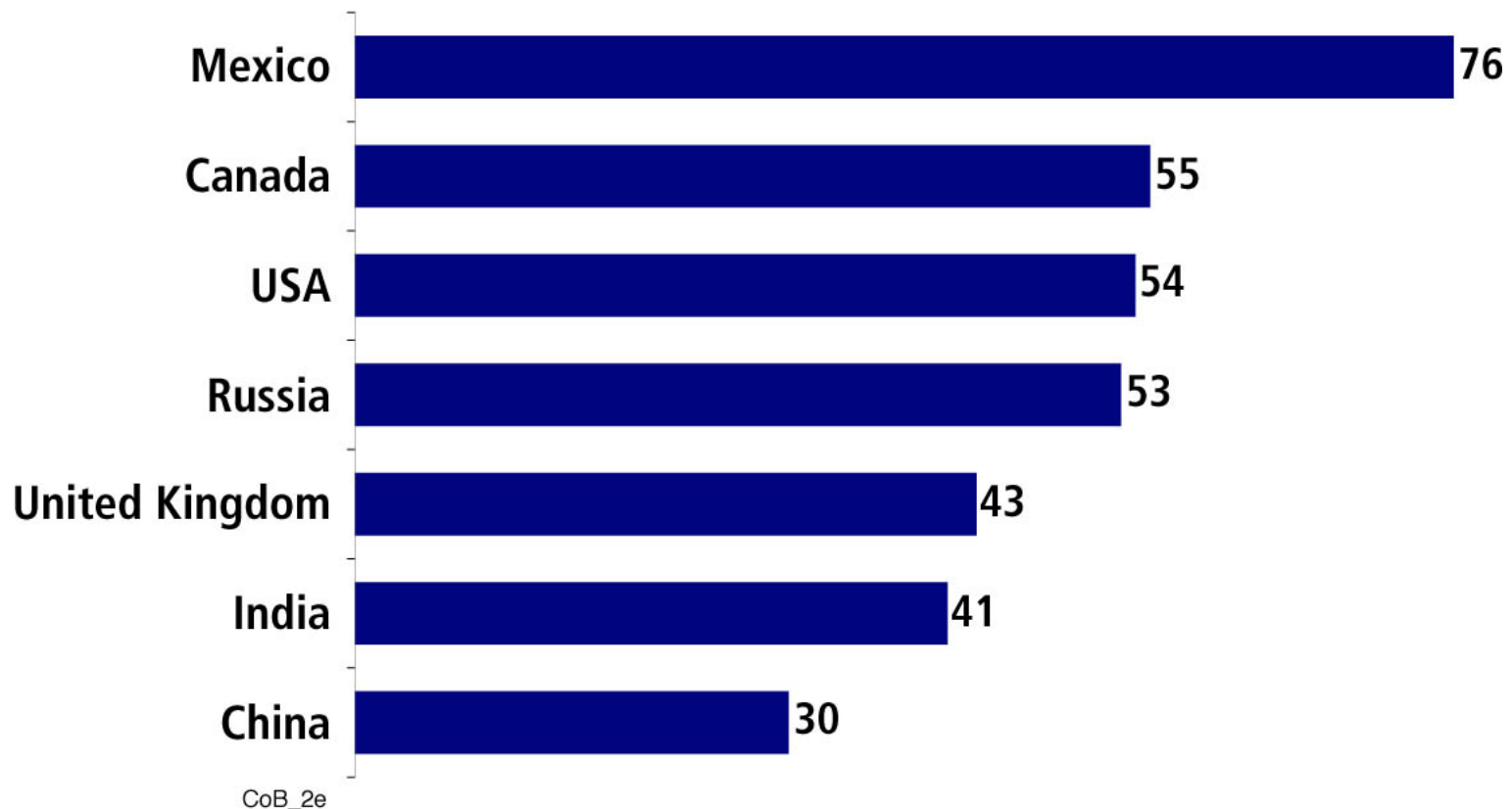
2. To what extent do you hold each of the following responsible for ensuring the availability of clean water for your community? Please use a scale of 1 to 5, where 1 means “not at all responsible” and 5 means “completely responsible.” d. Large companies.



# Individual Citizens Are Responsible for Ensuring Clean Water



“Responsible (4+5),” by Country, 2009



Note: Sample size  $n=500$  in all countries

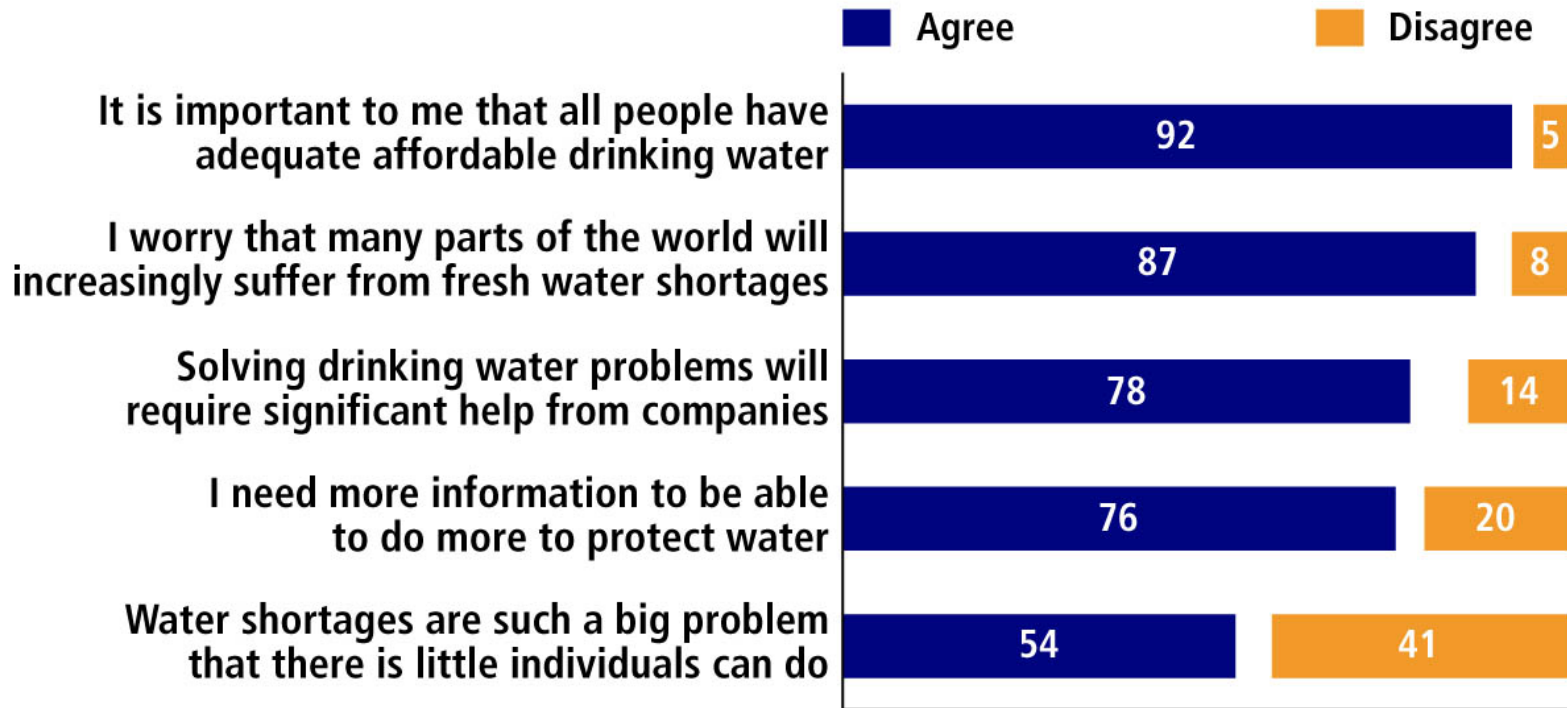
2. To what extent do you hold each of the following responsible for ensuring the availability of clean water for your community? Please use a scale of 1 to 5, where 1 means “not at all responsible” and 5 means “completely responsible.” e. You and your fellow citizens.



# Attitudes toward Water Issues



Average of 7 Countries, 2009



CoB09\_3

The white space in this chart represents “Depends / Neither agree nor disagree” and “DK/NA.”  
Note: Sample size  $n=500$  in all countries

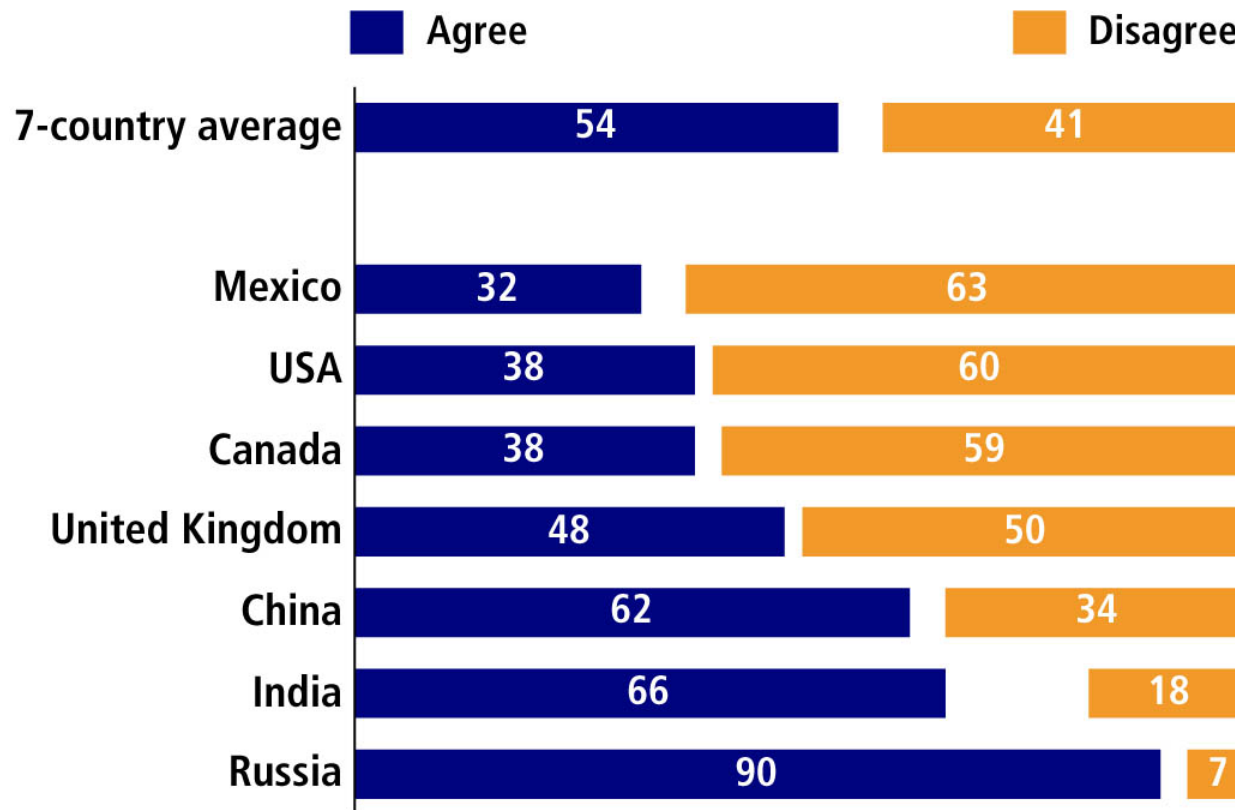
2. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.



# Water Shortages Are Such a Big Problem that There Is Little the Individual Can Do



By Country, 2009



CoB09\_3a

The white space in this chart represents "Depends / Neither agree nor disagree" and "DK/NA."

Note: Sample size  $n=500$  in all countries

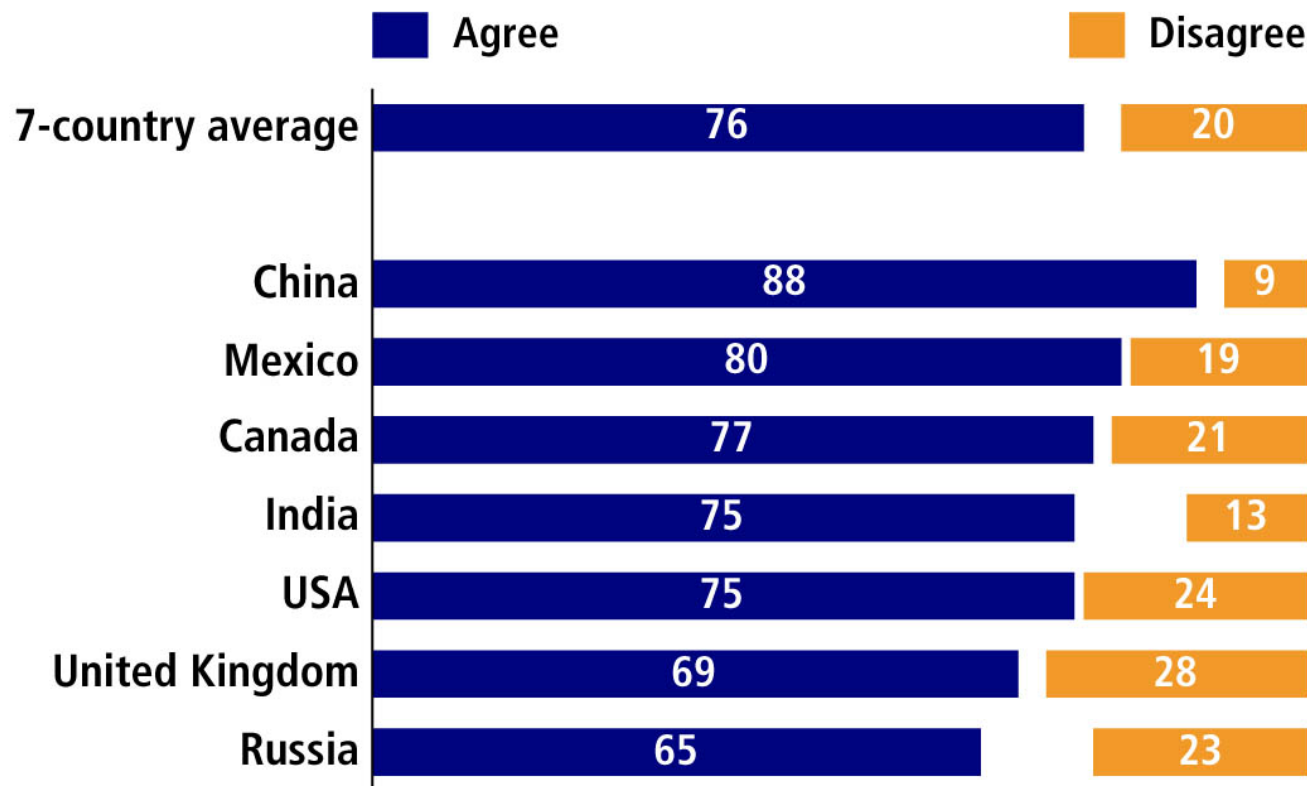
3. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. a. Water shortages are such a big problem that there is very little the individual can do about it.



# I Need More Information to Be Able to Do More to Protect Water



By Country, 2009



CoB09\_3b

The white space in this chart represents "Depends / Neither agree nor disagree" and "DK/NA."

Note: Sample size  $n=500$  in all countries

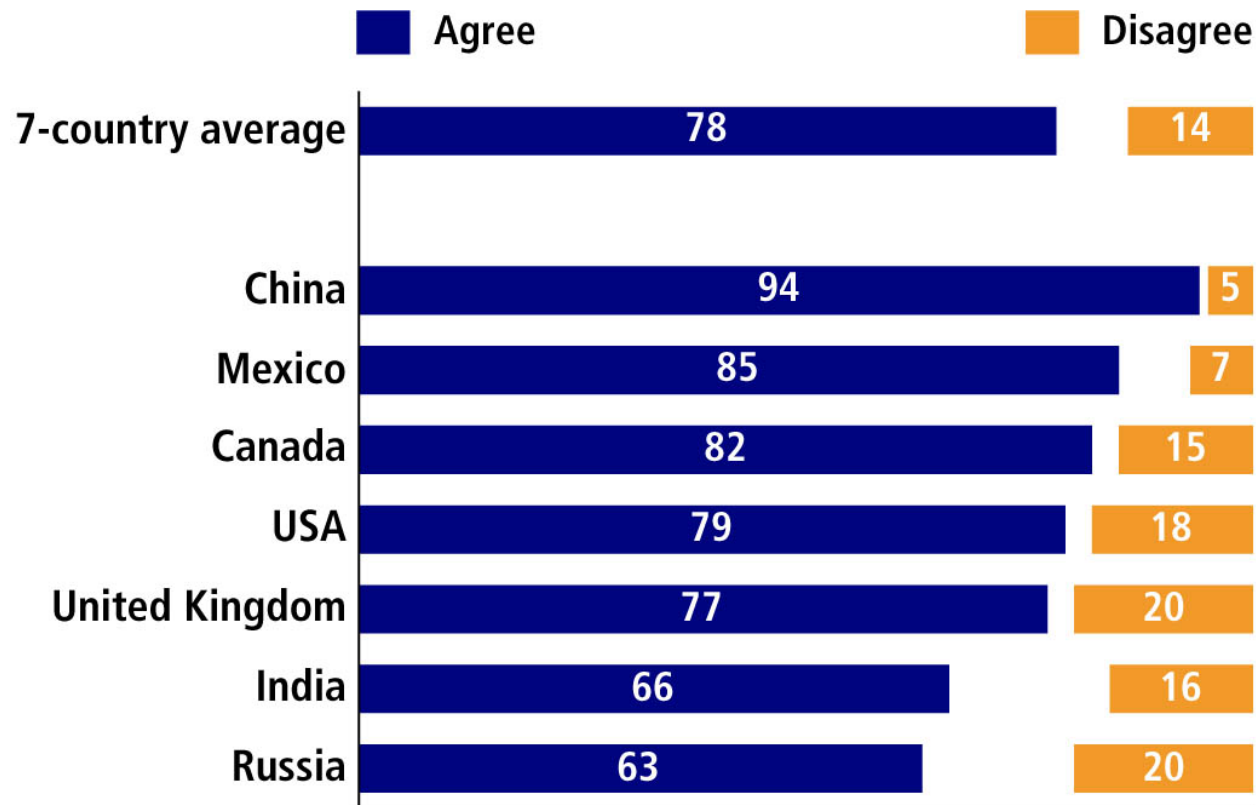
3. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. b. I need more information to be able to do more to protect water.



# Solving Drinking Water Problems Will Require Significant Help From Companies



By Country, 2009



CoB09\_3c

The white space in this chart represents "Depends / Neither agree nor disagree" and "DK/NA."

Note: Sample size  $n=500$  in all countries

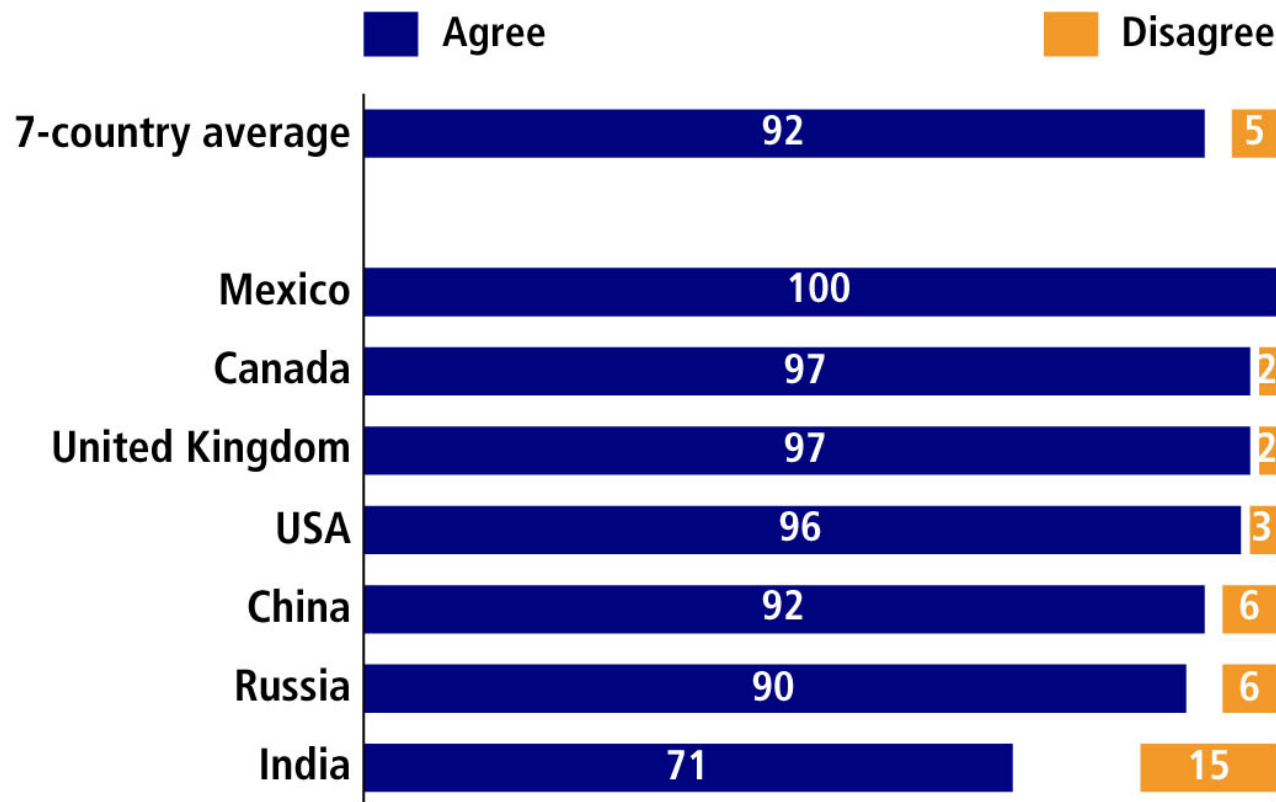
3. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. c. Solving [COUNTRY]'s drinking water problems will require significant help from companies.



# It Is Important to Me that All People Have Adequate, Affordable Drinking Water



By Country, 2009



CoB09\_3d

The white space in this chart represents "Depends / Neither agree nor disagree" and "DK/NA."

Note: Sample size  $n=500$  in all countries

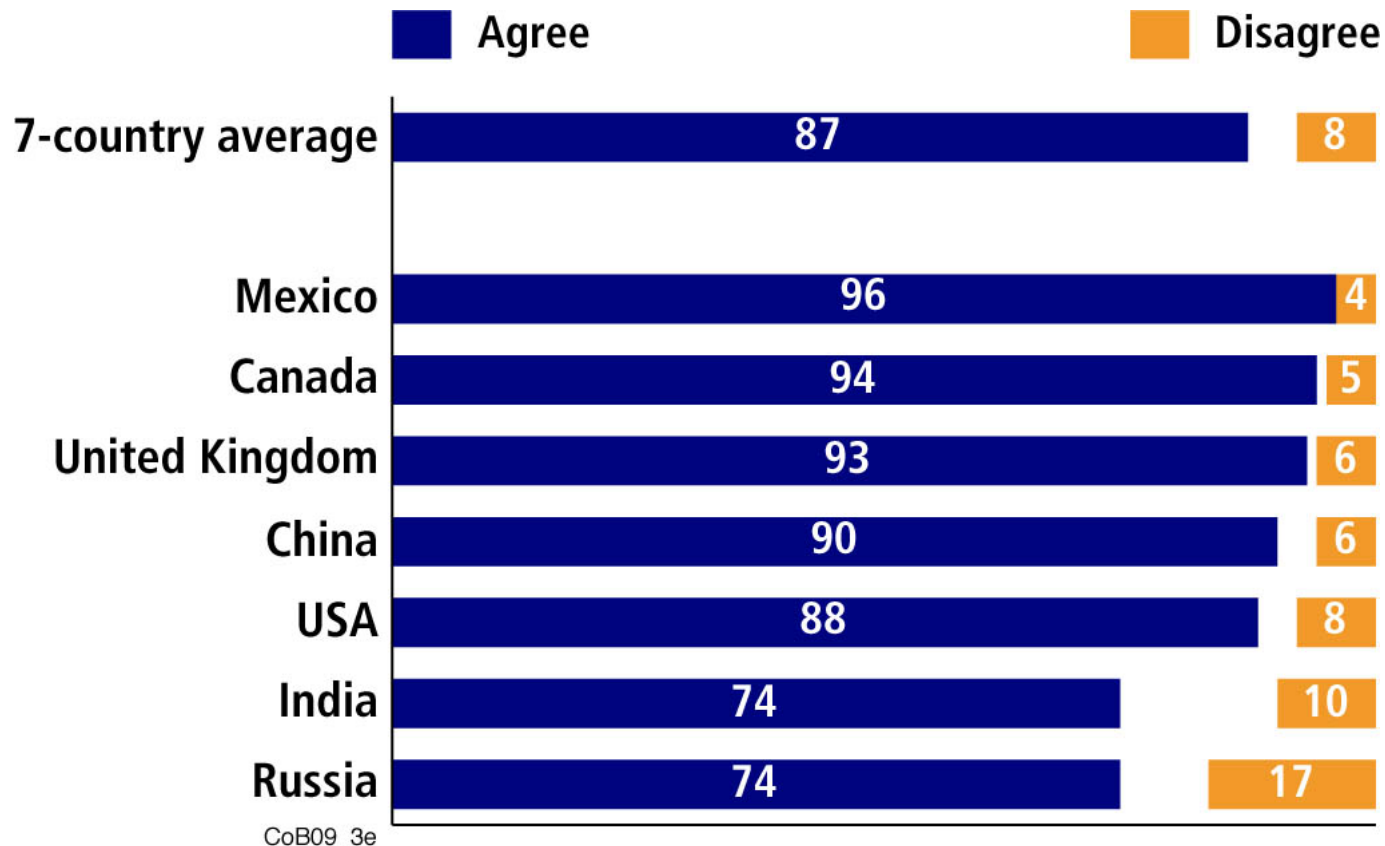
3. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. d. It is important to me that all people have adequate affordable drinking water.



# I Worry that Many Parts of the World Will Increasingly Suffer From Fresh Water Shortages



By Country, 2009



The white space in this chart represents "Depends / Neither agree nor disagree" and "DK/NA."

Note: Sample size  $n=500$  in all countries

3. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. e. I worry that many parts of the world will increasingly suffer from shortages of fresh water.





## Asked to all

**CC1t.** How serious a problem do you consider each of the following issues to be? Is each of the following a very serious problem, somewhat serious problem, not very serious problem or not a serious problem at all? READ AND ROTATE. CODE ONE EACH.

at) Water pollution in rivers, lakes and oceans

01 - Very serious problem

02 - Somewhat serious problem

03 - Not very serious problem

04 - Not a serious problem at all

VOLUNTEERED (DO NOT READ)

99 - DK/NA

bt) Air pollution in general

ct) Climate change or global warming, due to the Greenhouse Effect

dt) The depletion of natural resources, such as forests, farmland and fish

et) Automobile emissions (Car exhaust)

ft) The loss of animal and plant species

gt) Shortages of fresh water

# Questionnaire



**To be asked in China, India, Mexico, Russia, Canada, US and UK**

**CoB1. Please tell me if you are very concerned, somewhat concerned, not very concerned or not at all concerned about each of the following water issues?**

**READ AND ROTATE. CODE ONLY ONE**

- a) Lack of safe drinking water
- b) Lack of water for agriculture
- c) The high cost of water
- d) Polluted water [DO NOT ASK THOSE WHO ANSWER 04 for tracker question #at]
- 99 Don't know / No answer

**CoB2. To what extent do you hold each of the following responsible for ensuring the availability of clean water for your community?**  
Please use a scale of 1 to 5, where 1 means "not at all responsible" and 5 means "completely responsible." **READ AND ROTATE**

- a. Government
- b. Water companies
- c. Non-governmental organizations and charities, including environmental and social advocacy groups
- d. Large companies operating in your area
- e. You and your fellow citizens
- f. Farmers



# Methodology



Country	Sample size (unweighted)	Field dates	Sample	Survey methodology	Type of sample
Brazil	835	July 2–14, 2009	18–69	Telephone	Urban <sup>1</sup>
Canada	1,006	June 24 – July 24, 2009	18+	Telephone	National
Chile	1,000	June 25 – July 9, 2009	18+	Face-to-face	Urban <sup>2</sup>
China	1,000	July 2–16, 2009	18+	Telephone	Urban <sup>3</sup>
France	1,002	June 19–25, 2009	15+	Telephone	National
Germany	1,004	July 1–22, 2009	16–70	Telephone	National
India	1,346	July 20–25, 2009	18+	Face-to-face	National
Kenya	1,008	July 1–8, 2009	18+	Face-to-face	National
Mexico	1,000	July 1–16, 2009	18+	Telephone	Urban <sup>4</sup>
Nigeria	1,000	July 15–22, 2009	18+	Face-to-face	National
Philippines	1,000	June 26 – July 15, 2009	18+	Face-to-face	Urban <sup>5</sup>
Russia	1,008	July 24 – Aug. 3, 2009	18+	Face-to-face	National
Turkey	1,000	July 6–27, 2009	15+	Face-to-face	Urban <sup>6</sup>
United Kingdom	1,003	July 14 – Aug. 1, 2009	18+	Telephone	National
USA	1,009	July 1–29, 2009	18+	Telephone	National

<sup>1</sup>In Brazil the survey was conducted in Belo Horizonte, Brasília, Curitiba, Goiânia, Porto Alegre, Recife, Rio de Janeiro, Salvador, and São Paulo, representing 16% of the total national adult population.

<sup>2</sup>In Chile the survey was conducted in 78 cities, representing 85% of the national adult population. The cities were located in the Antofagasta, Arica y Parinacota, Atacama, Coquimbo, Bio Bió, Maule, Araucania, Libertador Bernardo O'Higgins, Los Lagos, Los Rios, Santiago Metropolitan, Tarapacá, and Valparaíso regions.

<sup>3</sup>In China the survey was conducted in Beijing, Beiliu, Chengdu, Dujiangyan, Fenyang, Fuyang, Guangzhou, Hangzhou, Manzhouli, Quanzhou, Qijing, Shanghai, Shenyang, Shuangcheng, Wuhan,

Xi'an, Xining, and Zhengzhou, representing 45% of the total national adult population.

<sup>4</sup>In Mexico the survey was conducted in Altamirano, Chilpancingo, Chihuahua, Cuernavaca, Guadalajara, Hermosillo, León, Mexico City, Monterrey, Morelia, Mérida, Pachuca, Poza Rica, Puebla, Tijuana, Villahermosa, representing 20% of the total national adult population, and 79% of the residential land lines.

<sup>5</sup>In the Philippines the survey was conducted in the National Capital Region, representing 12% of the total national adult population.

<sup>6</sup>In Turkey the survey was conducted in Adana, Ankara, Antalya, Bursa, Diyarbakir, Erzurum, Istanbul, Izmir, Konya, Samsun, and Zonguldak, representing 34% of the total national adult population.

CoB09\_method

GLOBESCAN



**GlobeScan** is a public opinion and stakeholder research company.

We track what society is thinking around the world,  
so that clients can make better-informed business decisions.

We provide country-by-country, stakeholder-specific  
metrics tailored to tracking key client issues.

[www.GlobeScan.com](http://www.GlobeScan.com)

