

Bottled Water Survey Report

For



By



December 2016

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METHODOLOGY & LOGISTICS

Overview

- This report represents the findings from an omnibus telephone survey of Ontario residents conducted by Oraclepoll in December 2016. The results contained in this report are from the four (4) questions subscribed to by the Council of Canadians
- Also included in this report are the results from a vote intent question and demographic indicators that were included in the omnibus survey.
- This Word report contains an executive summary of the findings and the results by question, while a separate Excel report contains a crosstabulation of the findings by vote intent and demographics.

Study Sample

- A total of n=1200 respondents were interviewed in the survey. The margin of error for the sample is +/- 2.8%, 19/20 times.

Survey Method

- All surveys were conducted by telephone using live operators at the Oraclepoll call centre facility.
- The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection. The dual frame random database was inclusive of land line and cell phone only residences.
- In total, 20% of all interviews were monitored and the management of Oraclepoll Research Limited supervised 100%.
- Surveys were conducted between the days of December 8th and December 13th 2016.

Logistics

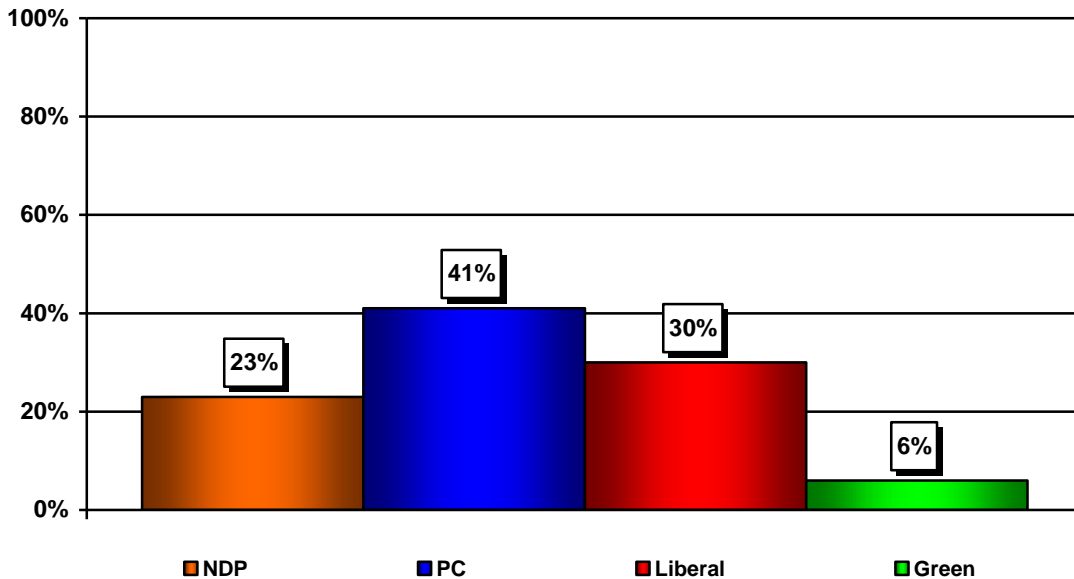
- Initial calls were made between the hours of 5 p.m. and 9 p.m. Subsequent call backs of no-answers and busy numbers were made on a (staggered) daily rotating basis up to 5 times (from 10 a.m. to 9 p.m.) until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact.

EXECUTIVE SUMMARY

VOTE INTENT

A provincial vote intent question was asked to all omnibus survey respondents

“If a provincial election were held today in Ontario, which Party would you most likely vote for or be leaning towards at this time?”



Among decided voters, the PC Party has the backing of 41% of Ontarians, while the Liberals have 30% support, the NDP trails at 23% and the Green’s sit at 6%. A high total 31% of those surveyed were undecided or did not know who that they would support.

PC support is strongest among those 65 or older (58%), 55-64 (49%) and 45-54 (43%) and among the highest combined household income earners of \$150,000 or more (46%). The NDP (36%) and Liberal’s (33%) have higher backing among 18-34 year olds and they both draw support from more females (NDP – 25% & Liberal’s – 34%) in relation to males (NDP – 20% & Liberal’s – 26%). There is also a gender split among Tory backers with a higher number of males (48%) in relation to females (33%) being likely to vote PC.

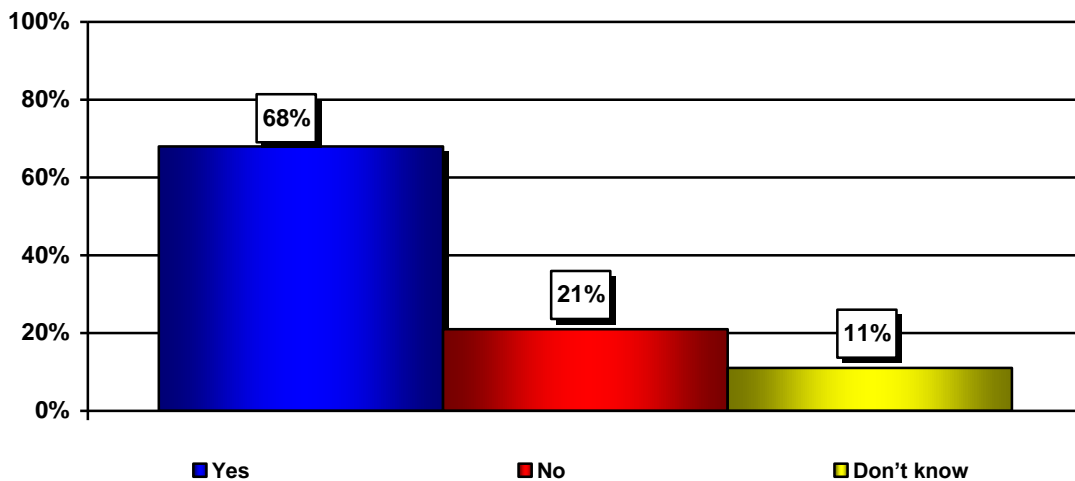
ELORA WELL PURCHASE

Respondents to the Council of Canadians set of questions were first read the following brief statement describing the background to the Elora, Ontario “well issue”. They were then asked four related questions.

“Nestlé Waters Canada currently has two wells in southern Ontario for its commercial water bottling plants. This October it purchased another well in Elora, Ontario, despite an effort by the Township of Centre Wellington to acquire it in order to safeguard the municipal water supply.”

The first question related to support for (the province) requiring Nestle to sell the Elora well to the Township of Centre Wellington.

Q1. “In your opinion, should the provincial government of Ontario require Nestle to sell the Elora well to the Township?”



In total 68% of Ontario voters surveyed are of the opinion that the provincial government should require Nestle to sell the Elora well to the Township of Centre Wellington, 21% do not feel that it should and 11% were unsure.

Support for a required sale was highest among Green (98%), followed by NDP (79%) and Liberal (75%) voters, while lowest among PC's (49%). In addition, support was higher among Toronto (71%) and Hamilton / Niagara (72%) residents and among females (72%). While still in majority territory, support was lowest among those aged 65+ (63%), males (64%) and residents of central (62%) and eastern (65%) Ontario.

PROVINCIAL REGULATIONS

Respondents were then read the following statement highlighting proposed provincial regulations and then were asked to rate their level of agreement with three statements.

“The government of Ontario has proposed new regulations that would place a moratorium on new or expanded water takings (water bottling operations) by commercial water bottlers until January 2019.”

“Do you agree or disagree with each of the following statements related to commercial water bottling in Ontario? Please use a scale of 1-Strongly disagree, 2-Somewhat disagree, 3-Somewhat agree, 4-Strongly agree.”

AGREEMENT QUESTIONS	Total Disagree	Total Agree	Do not Know
Q2. The provincial government should permanently phase out all permits for bottled water-takings (water bottling operations)	29%	65%	7%
Q3. The provincial government should place a priority on the drinking water needs of local communities over any pending applications from commercial bottling companies to acquire ground water sources	5%	93%	2%
Q4. The Ontario government should hold a series of public consultations to determine how water use is prioritized in the province	24%	69%	7%

On the issue of **phasing out permits (Q2)**, 65% of respondents somewhat (25%) or strongly agreed (40%) to the statement, compared to 29% that somewhat (12%) or strongly (17%) disagreed, while 7% did not know. Younger Ontarians 18-34 (74%) and 35-44 (68%) were more likely to agree compared to older residents 65+ (51%). In addition, more females (72%) in relation to males (57%) agreed. Green Party voters were most inclined to agree (98%), followed by New Democrats (83%) and Liberals (70%), but only by 34% of Conservatives agreed.

More than nine in ten or 93% of Ontario voters somewhat (23%) or strongly agreed (70%) that the **province should make the drinking water needs of local communities a priority over applications from commercial bottling companies to acquire ground water sources (Q3)**. While total agreement was high across all cohorts, those most inclined to strongly agree were 18-34 year olds (77%), females (74%), Toronto (73%) as well as Hamilton / Niagara dwellers (74%) and voters backing the Green’s (100%), NDP (85%) and Liberals (75%).

Almost seven in ten or 69% somewhat (19%) or strongly agreed (50%) that **the government should hold a series of public consultations on how water is prioritized (Q4)**. This compares to 24% that disagreed, while 7% did not know or had no opinion. Younger 18-34 year olds (82%), females (76%), Green supporters (100%) and those backing the NDP (89%) and Liberals (88%) most agreed, compared to males (62%), those 65 or older (48%) and PC voters (26%).

RESULTS BY QUESTION

“Nestlé Waters Canada currently has two wells in southern Ontario for its commercial water bottling plants. This October it purchased another well in Elora, Ontario, despite an effort by the Township of Centre Wellington to acquire it in order to safeguard the municipal water supply.”

Q1. In your opinion, should the provincial government of Ontario require Nestle to sell the Elora well to the Township?

	Frequency	Percent
Yes	816	68.0
No	246	20.5
Don't know	138	11.5
Total	1200	100.0

“The government of Ontario has proposed new regulations that would place a moratorium on new or expanded water takings (water bottling operations) by commercial water bottlers until January 2019.”

“Do you agree or disagree with each of the following statements related to commercial water bottling in Ontario? Please use a scale of 1-Strongly disagree, 2-Somewhat disagree, 3-Somewhat agree, 4-Strongly agree.”

Q2. The provincial government should permanently phase out all permits for bottled water-takings (water bottling operations)

	Frequency	Percent
Strongly disagree	139	11.6
Somewhat disagree	202	16.8
Somewhat agree	300	25.0
Strongly agree	479	39.9
Don't know	80	6.7
Total	1200	100.0

Q3. The provincial government should place a priority on the drinking water needs of local communities over any pending applications from commercial bottling companies to acquire ground water sources

	Frequency	Percent
Strongly disagree	21	1.8
Somewhat disagree	43	3.6
Somewhat agree	272	22.7
Strongly agree	840	70.0
Don't know	24	2.0
Total	1200	100.0

Q4. The provincial government should permanently phase out all permits for bottled water-takings (water bottling operations)

	Frequency	Percent
Strongly disagree	101	8.4
Somewhat disagree	184	15.3
Somewhat agree	232	19.3
Strongly agree	600	50.0
Don't know	83	6.9
Total	1200	100.0

VOTE INTENT

"If a provincial election were held today in Ontario, which Party would you most likely vote for or be leaning towards at this time?"

VOTE INTENT-EXCLUDING UNDECIDED'S

	Frequency	Percent
The Liberal Party	251	30.3
The PC Party	336	40.6
The NDP	187	22.6
The Green Party	54	6.5
Total	828	100.0

VOTE INTENT-INCLUDING UNDECIDED'S

	Frequency	Percent
The Liberal Party	251	20.9
The PC Party	336	28.0
The NDP	187	15.6
The Green Party	54	4.5
Don't know	372	31.0
Total	1200	100.0

DEMOGRAPHICS

AGE

	Frequency	Percent
18-34	327	27.3
35-44	209	17.4
45-54	248	20.7
55-64	190	15.8
65 & over	226	18.8
Total	1200	100.0

COMBINED HOUSEHOLD INCOME

	Frequency	Percent
Under \$50,000	230	19.2
\$50,000 to \$74,999	243	20.3
\$75,000 to \$99,999	96	8.0
\$100,000 to \$150,000	211	17.6
More than \$150,000	148	12.3
Don't know / refused	272	22.7
Total	1200	100.0

GENDER

	Frequency	Percent
Male	595	49.6
Female	605	50.4
Total	1200	100.0