

wellsafe.net Economic Impact Survey

Preliminary results, unweighted
7-Sep-04

Total Sample: 262

Percentages may not total 100 due to rounding

REF

1	Response by Tourist region	262
	Southwest	12%
	Greater Toronto	1%
	Central	24%
	East	31%
	Ottawa	5%
	Northern Ontario	26%

3	Approximate population		Cumulative
	Rural	36%	36%
	Less than 1000	23%	59%
	1000 to less than 5000	25%	84%
	5000 to less than 10000	9%	93%
	Over 10000	7%	100%

4	Type of establishment	
	Accommodation	89%
	Restaurant/Food Beverage	3%
	Church	0%
	Event Site/Attraction	4%
	Retail Store	1%
	Other	2%

4A	Type of accommodation	
	Inn/Resort/motel/hotel	42%
	B&B	33%
	Camp / Trailer Park	15%
	Cottage	9%
	Other	1%

4B	All accommodations: Number of rooms or overnight campsites	Respondents (Cumulative)	% of rooms represented
	3 or less	29%	3%
	5 or less	37%	5%
	10 or less	57%	12%
	20 or less	78%	26%
	Minimum	1	
	Maximum	352	
	Mean	23	
	Median	8	

Only 22% of respondents represent 74% of rooms in the range between 21 - 352 rooms / campsites

4C	Months open	
	6 or less	35%
	7 to 11 months	12%
	Year round	53%

4D Category of system

Small Non-Municipal Non-Residential	61%
Non-Municipal Year-round Residential	18%
Non-Municipal Seasonal Residential	18%
Large Non-Municipal Non-Residential	2%

It is believed there is confusion among some respondents with regard to which category of system they fall under. For example, 30% of B&Bs consider themselves Non-Municipal Year-round residential, while 66% consider themselves Small Non-Municipal Non Residential.

5 Water Source

Drilled well	63%
Lake or surface system	26%
Dug well	12%

*Of those on a surface water system: 54% are in the Resort/Motel/Hotel category
48% are in Northern Ontario
73% of B&B respondents are served by private drilled wells.*

7 Is water treatment equipment currently installed?

Yes	54%
No	46%

Who has water treatment?

B&Bs	60%
Small Inns	44%
Resort/Motel/Hotel	58%
Camp	48%
Cottage	47%

8 Of those with equipment, what kind of equipment is it?

Cartridge Filters	26%
UV	24%
Chlorination	15%
Sand Filters	9%
Reverse Osmosis	4%
1 Micron absolute	6%
Taste & Odor	5%
Deionizer, chemical assist, other	10%

Ave number of filtration systems in place for those who have equipment installed: 2.3

9 How often do you test your water?

		Cumulative
Daily	7%	7%
Weekly	11%	18%
Bi-weekly	6%	23%
Monthly	25%	49%
Quarterly	15%	63%
2 or 3x per year	18%	81%
Once per year	11%	92%
Other	2%	94%
Do not test	7%	100%

<i>Who tests</i>	<i>B&Bs</i>	<i>Inn/Res/M/H</i>	<i>Camp</i>	<i>Cottage</i>
Daily, weekly or bi-weekly	7%	27%	61%	11%
Monthly	30%	29%	18%	5%
Quarterly	27%	12%	3%	0%
2-3 times / year	20%	10%	9%	37%
Annually	11%	12%	3%	26%
Other	1%	1%	6%	5%
Do not test	4%	9%	0%	16%

10 Have you ever received a rating...considered by the test as less than acceptable?

No	86%
Yes	13%
Don't know	2%

Of those who have NEVER received a negative rating:

Have filtration	53%
Have no filtration	47%

Of those who HAVE received a negative rating:

Have filtration	68%
Have no filtration	32%

10B Of those with negative tests, was situation resolved after taking action?

Yes	100%
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11 Who conducts your water tests?

Health Dept	69%
Private Lab	18%
Self-test	10%
Other	3%

19% of respondents use multiple test sources (most often 2nd method is self test)

12 Percentage who pay 25%

12A How much do you pay per test? (of those who pay)

		Cumulative
\$5 or less	10%	10%
\$6 - \$10	8%	18.0%
\$11 - \$20	21%	39.3%
\$21 - \$30	21%	60.7%
\$31 - \$50	15%	75.4%
\$51 - \$75	10%	85.2%
\$75 - \$100	8%	93.4%
\$101 +	7%	100.0%
Minimum	2	
Maximum	200	
Average	\$ 41	

13	How satisfied are you with the way your water tests are currently being conducted?		Tested by:				
		Overall	Health	Priv	Self	Other	
	Very satisfied	66%	71%	41%	59%	50%	
	Mostly satisfied	15%	14%	16%	14%	13%	
	Neither satisf or dissat	13%	11%	25%	14%	25%	
	Mostly or very dissatisf	7%	5%	18%	15%	13%	
14	Has there ever been an instance where someone has become ill as a result of drinking water from your drinking-water system?						
	No	100% *					
	<i>* one incident of illness reported but water system not verified as source of illness</i>						
15	Are you PERSONALLY FAMILIAR with any incident where someone has become ill as a result of drinking from another PRIVATE drinking-water source?						
	No	100%					
16	Percentage of those who live at the premises						
	<i>Who lives where they work</i>						
	B&Bs	99%					
	Small Inns	100%					
	Resort/Hotel/Motel	89%					
	Camp / Trailer Park	85%					
	Cottage	68%					
17	Percentage of those who regularly drink their own water						
	94%						
20	How did you first become aware of Ontario Regulation 170/03?		B&Bs	Inns/Res/M/H	Camp	Cottage	
	Written notice from the Government of Ontario	38%	38%	39%	55%	32%	
	Chamber of Commerce or Association	28%	24%	32%	24%	26%	
	Word of mouth, friend or neighbour	13%	17%	12%	6%	11%	
	Through the news media	9%	6%	8%	3%	16%	
	Through the internet	5%	11%	3%	0%	11%	
	Not sure/Don't remember	2%					
	Government Advertising	2%					
	Other	2%					
20A	Have you already implemented or begun to implement the Regulation?						
	Yes	24%					
	No	76%					
21	Have you obtained a report outlining what you must do to be in compliance?						
	From a professional engineer	10%					
	Other qualified evaluation or general estimate	15%					
	No	76%					
	Who has obtained a report?		Yes	No			
	B&Bs	18%	82%				
	Inns/Resorts/Motel/Hotel	22%	78%				
	Camps	55%	46%				
	Cottage/Other	5%	95%				
22.1	One time capital cost, Low Estimate						
		Low	High				
	Range \$	130	\$ 50,000				
	Average \$	13,934					

22.2	One time capital cost, High Estimate		Low	High
		Range \$	200	\$ 300,000
		Average		\$ 29,047
22.3	Annual cost of testing, Low Estimate		Low	High
		Range \$	100	\$ 20,000
		Average \$	1,948	
22.4	Annual cost of testing, High Estimate		Low	High
		Range \$	170	\$ 100,000
		Average		\$ 5,476

23	Given the requirement, what do you intend to do?	Total	Who intends:			
			B&Bs	Inn/Res/H/M	Camps	Cottage/oth
	Give notice to comply	22%	4%	30%	33%	32%
	Seek an exemption	29%	32%	32%	15%	47%
	Close and cease operations	16%	37%	5%	3%	5%
	Operate without complying	13%	11%	17%	6%	5%
	Not yet decided / wait and see	12%	10%	10%	18%	11%
	Other	5%	4%	4%	6%	0%
	Already in compliance	5%	1%	1%	18%	0%

23A	Have May 12 amendments influenced the action you intend to take?			
	Yes	33%		
	No	26%		
	Don't know	41%		
	<i>Who perceives an impact?</i>		Yes	No
	B&Bs	48%	27%	26%
	Inns/Resorts/Motel/Hotel	29%	24%	47%
	Camps	27%	33%	39%
	Cottage/Other	26%	21%	53%

It may be that some accommodation providers believe they will be exempt through the posting of notices. (See intentions 23, above.) A need for MOE clarification regarding B&Bs is indicated.

23B	How confident are you that Advisory Council will make recommendations appropriate to your situation?	
	(1=not confident; 7 = very confident)	
	Average:	1.94
23C	Do you feel you understand what the Regulations require you to do?	
	(1=not at all; 7 = understand very well)	
	Average:	3.97
23D	How simple or complex do you believe it will be to implement?	
	(1=very simple; 7 = very complex)	
	Average:	5.89
	Don't Know:	18%

23E How simple or complex do you believe it will be to maintain
 (1=very simple; 7 = very complex)

Average:	6.00
Don't Know:	18%

23F How economically feasible is it to do what the Regulation requires?
 (1=not at all; 7 = very)

Average:	1.70
Don't Know:	8%

24 How many room-nights would you say you are booked per year?

Minimum:	15
Maximum:	28,000
Mean:	1,446
Median:	553
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Total room nights represented by survey:	313,765

25 How often do guests eat at local restaurants?

Always or more than half the time	48%
About half the time	9%
Less than half or rarely	39%
Don't know	5%

26 How often do they shop at local retail stores?

Always or more than half the time	67%
About half the time	16%
Less than half or rarely	12%
Don't know	5%

27 How often do they attend or participate in other activities in the community?

Always or more than half the time	39%
About half the time	22%
Occasionally or never	35%
Don't know	5%

28 Is there the capacity to accommodate overnight visitors if most or all rural accommodations in your area were to close?

Probably enough capacity for almost everyone	9%
Believe will be little or no vacancy	11%
Believe visitors will be turned away often	82%
Don't know	7%

		Who's in business?			
		B&Bs	Inn/Res/H/M	Camps	Cottage/oth
31 The business affected by the regulation is:					
Our only business	70%	53%	84%	82%	53%
Primary business	18%	23%	16%	12%	37%
Secondary business	11%	24%	0%	3%	11%
Community based group (1 case)	0%			3%	

32 Number of paid employees

Minimum:	0
Maximum	115
Average, all respondents	5.4
Average, respondents with employees	8.8

Percentage with employees 61%

33 Number of family members in the enterprise

Minimum:	0
Maximum	8
Average	2.5

Percentage involving family members 96%

34 Number of volunteers

Minimum:	0
Maximum	50
Average, all respondents	1.4
Average, respondents with volunteers	5.3

Percentage involving volunteers 26%

35 Percentage of total revenue lost if forced to close?

		Cumulative
10% or less	6%	
11 to 25%	12%	17%
25 to 50%	13%	30%
51 to 95%	19%	49%
96 - 100%	51%	100%
Minimum:	0% *	
Maximum	100%	
Average	74%	

* Mail-in surveys where question left blank were entered as 0

36 Do you receive any funding from public or other sources?

Operate solely with public funds / fundraising	1%
Private business receiving no public money	99%
Both public and private business income (1 case)	0%

37 If you close, what is the annual dollar amount in gross revenue that you would lose?

Minimum:	\$ 29
Maximum	\$ 12,000,000
Mean	\$ 240,058
Median	\$ 69,000

Refused: 17%

Total gross income represented by respondents: \$ 52,092,604

38.1 On a capital cost basis, what could you invest financially?	Cumulative	
\$0	7%	7%
\$100 to 500	7%	14%
\$500-1,000	10%	24%
\$1,000 - 2,500	14%	38%
\$2,500 - 5,000	16%	54%
\$5,000 - 10,000	4%	58%
More than 10,000	3%	61%
 Don't Know	 39%	 100%
 Minimum:	 \$0	
Maximum:	\$20,000	
Mean:	\$3,979	
Median (approx)	\$1,650	

38.2 On an annual basis for on-going testing, what could you spend?	
Minimum:	\$0
Maximum:	\$ 5,000
Mean:	\$ 477
Median	\$ 200
 Don't know	 40%

38A.1 I am concerned about my exposure to liability if I operate without complying	
(1=not at all; 7 = very concerned)	
Average:	4.66

38A.2 I am concerned about my exposure to penalties and fines if I operate without complying	
(1=not at all; 7 = very concerned)	
Average:	6.08

38A.3 It is important to me personally to ensure that my water is completely safe to drink	
(1=not important; 7 = very important)	
Average:	6.74

38A.4 I am confident in the safety and quality of my water supply	
(1=not confident; 7 = very confident)	
Average:	6.71

43 Which statement best describes how you feel about the impact of these regulations?

I have little or no problem complying because I believe this is the right thing to do	1%
I consider this a cost of doing business and will budget other items accordingly.	0%
I don't like them, but feel I have no choice but to comply if I want to stay in business	21%
I can't comply because my revenue after expenses cannot support the cost of what the Regulation requires me to do	30%
I refuse to comply because the cost will put me out of business	5%
I'm not happy about the cost, but I am even more concerned about the complexity of the Regulation, and the degree of difficulty it involves for my situation	39%
Other	5%

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