

Toronto

Montreal

Quebec

Ottawa

Edmonton

Philadelphia

Denver

Tampa



Canadian Carwash Association

OMNI Results December, 2010

Method

INSTRUMENT

- ▶ The survey was completed on-line from Monday, December 6th, 2010, to Wednesday, December 8th, 2010, using Leger Marketing's online panel, *LegerWeb*.
- ▶ A sample of 1521 Canadians, 18 years of age or older.
- ▶ A probability sample of the same size would yield a margin of error of $\pm 2.5\%$, 19 times out of twenty.

ONLINE PANEL

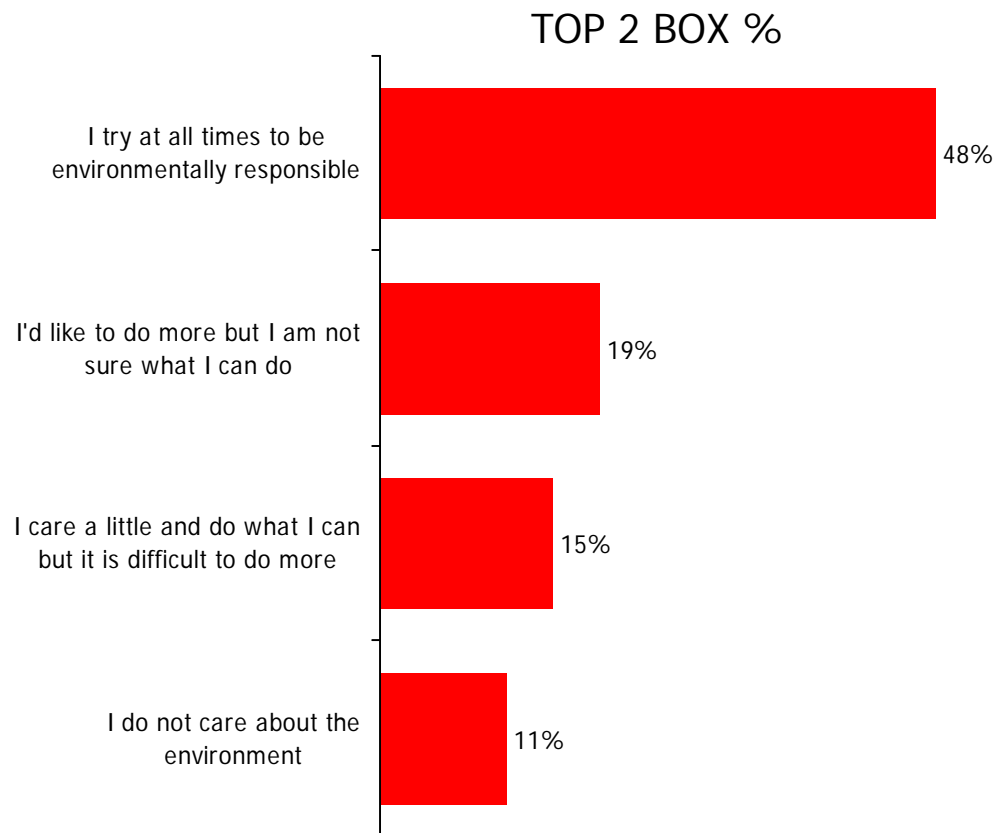
- ▶ Leger Marketing's online panel has approximately 345,000 members nationally – with between 10,000 and 20,000 new members added each month, and has a retention rate of 90%.
- ▶ Panel members are randomly selected to receive email invitations to the individual surveys.
- ▶ We ensure the protection of privacy via the usage of unique URLs and respondent IDs in combination with survey IDs.

QUALITY CONTROL

- ▶ Stringent quality assurance measures allow Leger Marketing to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients' needs with honesty, total confidentiality, and integrity.

Most Canadians try at all times to be environmentally responsible

- Nearly half of respondents try at all times to be environmentally responsible.
- Demographically....
 - Those in Quebec are significantly more likely to be environmentally responsible at all times (61%).
 - Women are more likely to indicate that they try at all times to be environmentally friendly (51% vs. men 45%) and that they would like to do more but they are not sure what to do (22% vs. men 15%).



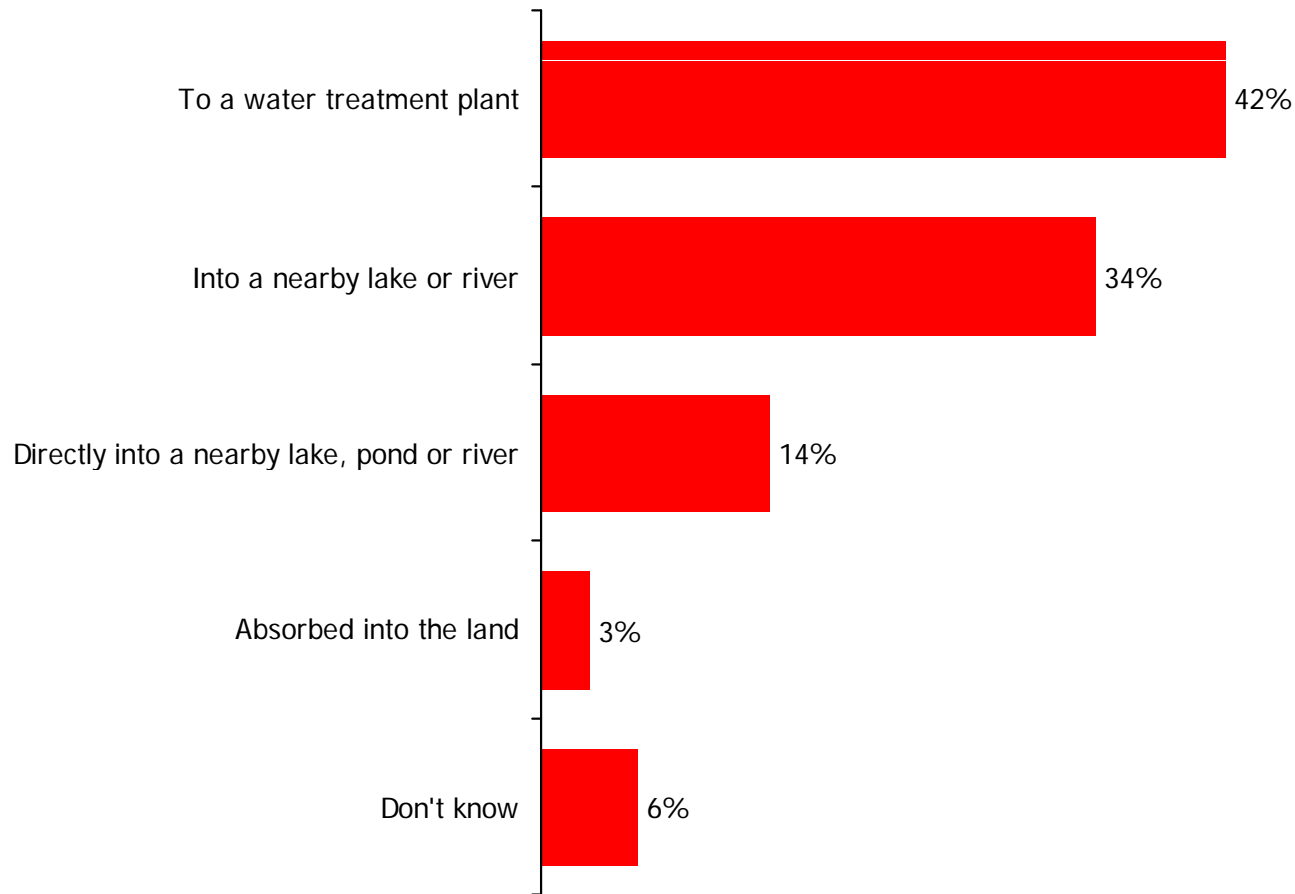
Q1. On a scale from 1 to 7, where 1 means the statement does not describe you at all and 7 means it describes you very well, please rate how well each of the following statements describes your attitude on the environment?

SUMMARY TABLE OF TOP 2 BOX

Base: All (n=1521).

Most respondents think the water goes to a water treatment plant when it goes down storm drains on the street

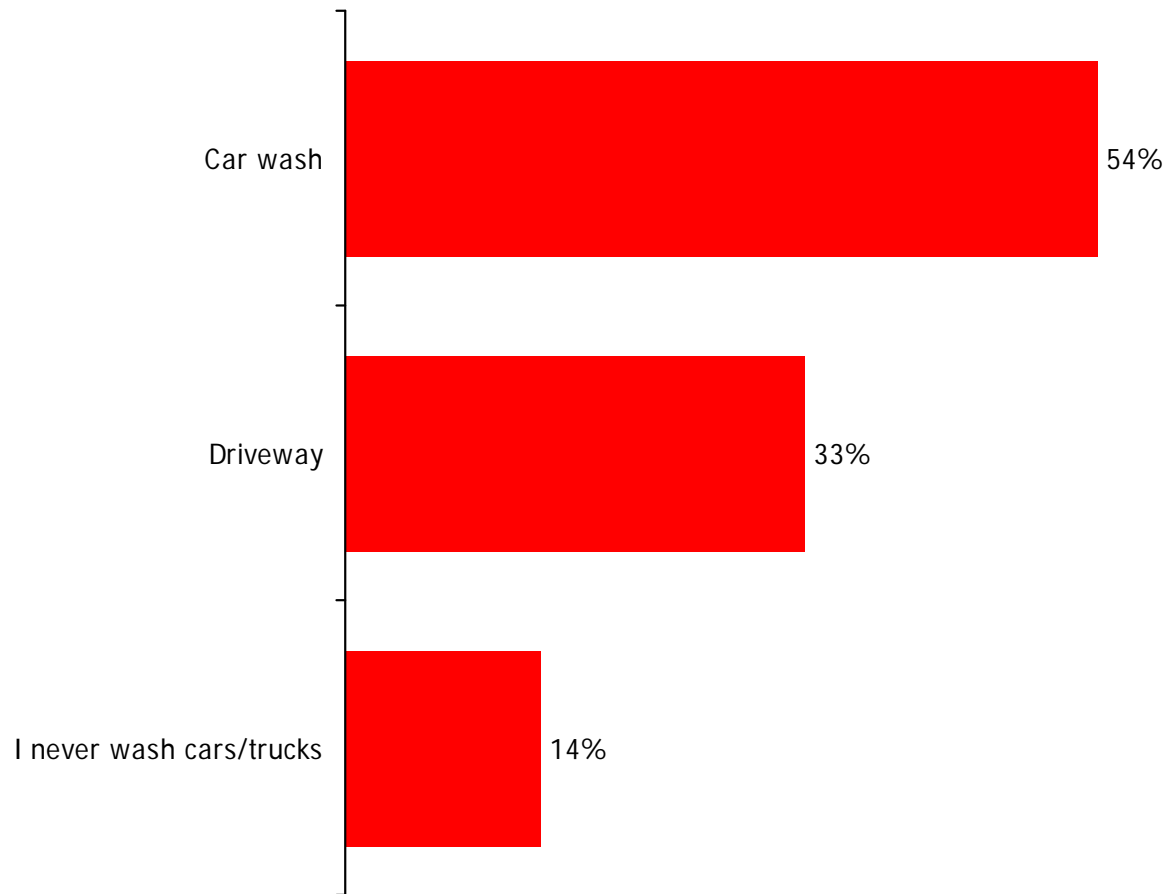
- Four-in-ten respondents think the water from the storm drains goes to a water treatment plant.
- Demographically.....
 - Those in Quebec are more likely to think that the water from the storm drains goes to a water treatment plant (53%).
 - Those in Ontario (39%), the Prairies (41%) and BC (35%) are more likely than Quebec (25%) to think that the water goes into a nearby lake or river.
 - Men are more likely to think the water from the street goes into a nearby lake or river (38% vs. 31% of women) and directly into a nearby lake, pond or river (17% vs. 12% of women).



Q2. Where do you think water goes when it goes down storm drains on the street?
Base: All (n=1521).

More respondents tend to wash their car or truck at the car wash vs. their driveway

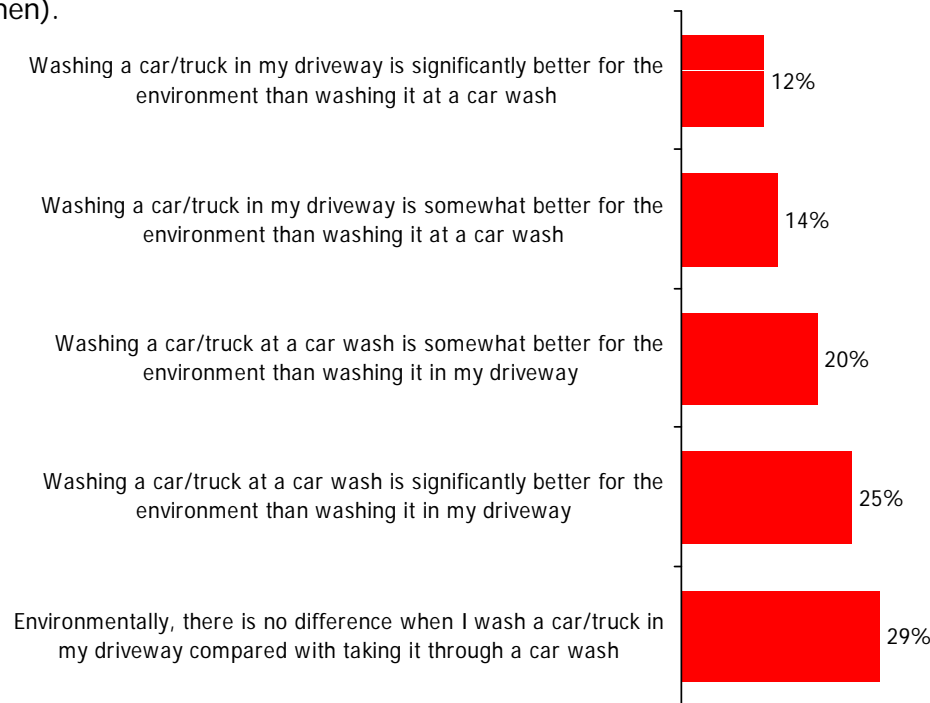
- Over half of the respondents indicated that they are more likely to wash their car/truck at a car wash (54%) vs. their driveway (33%).
- Demographically....
 - Those in Alberta are least likely to wash their car in their driveway (8%).
 - Those in Ontario (55%), the Prairies (73%) and Alberta (86%) are more likely to wash their car/truck at a car wash vs. those in Atlantic Canada (39%), Quebec (45%) and BC (42%).
 - Those most likely to wash their car at a car wash are those 55 and over (60% vs. 48% 18-34), men (57% vs. 51% of women) and those who are married (56% vs. 47% of people who are single).
 - Women are more likely than men to indicate that they never wash cars/trucks (18% vs. 9% of men).



Q3. Would you say you are more likely to wash a car/truck in your driveway or go to a commercial car wash?
Base: All (n=1521).

Overall, most don't see a difference environmentally whether you wash your vehicle at a car wash or in their driveway

- Most Canadians think that there is no difference environmentally whether they wash their vehicle in their driveway or take it through a car wash.
- Those that are likely to wash their vehicle in the driveway think that this is significantly more environmentally friendly compared to the car wash, whereas those that are likely to wash their vehicle at a car wash think that this is the more environmentally friendly option.
- Those that consider themselves not environmentally friendly are more likely to indicate that there is no difference environmentally whether they wash their vehicle at a car wash or their driveway.
- Demographically.....
 - Those in Quebec are more likely than those in Alberta to indicate that washing their vehicle in their driveway was significantly better for the environment than washing it at a car wash (18% vs. 7%).
 - Those 45-54 (15% vs. 9% of those 35-44) and those that make \$40k or less a year (17%) are also more likely to say that washing their vehicle in their driveway was significantly better for the environment than washing it at a car wash.
 - Albertans are more likely than other provinces to indicate that washing their vehicle at a car wash is significantly better for the environment than washing it in their driveway (40%).
 - Women are more likely to think that there is no difference when washing their vehicle at a car wash or at home in the driveway (34% vs. 25% of men).

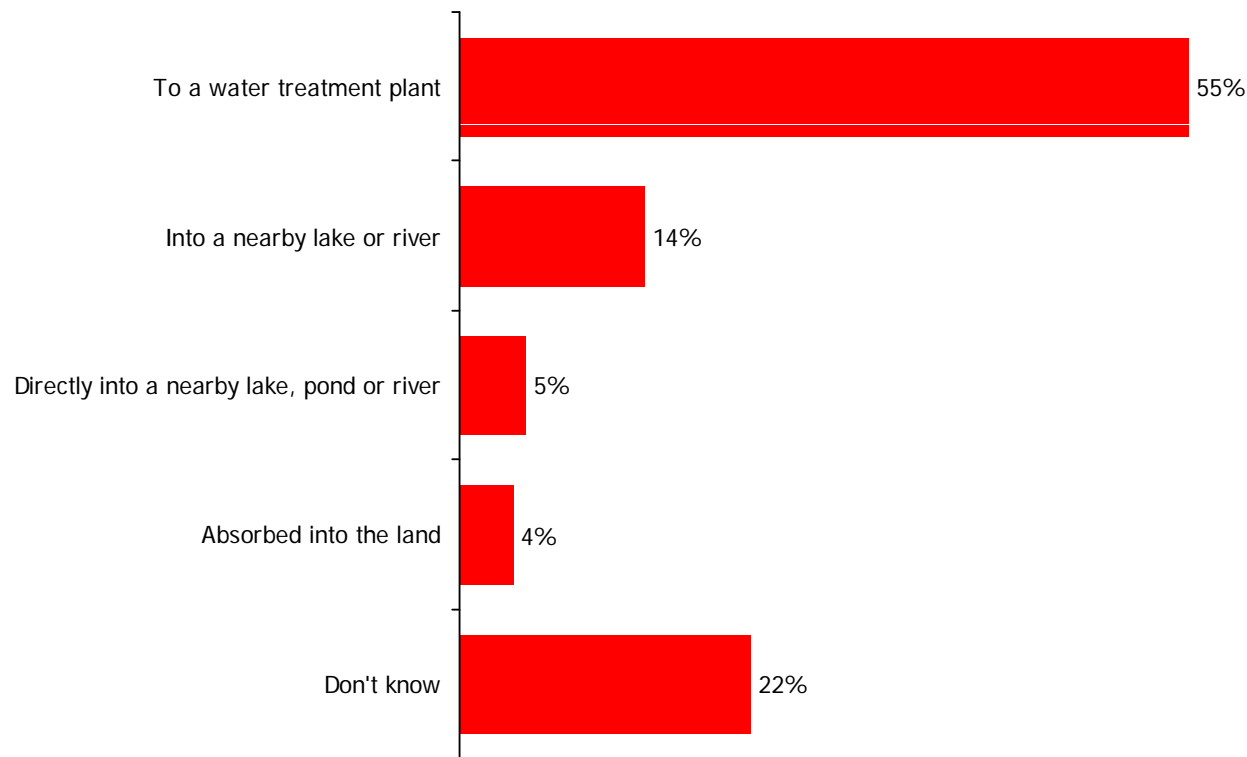


Q4. Which statement best fits with your perception when it comes to the environment and specifically water pollution?

Base: All (n=1521).

Five-in-ten respondents believe that the water from a commercial car wash goes to a water treatment plant

- Over half of Canadians think that the water from a commercial car wash goes to a water treatment plant, followed by most not knowing where it goes.
- Those that consider themselves environmentally friendly are more likely to not know where the water goes from a commercial car wash (24% vs. 16% of those who are not environmentally friendly).
- Those that indicated that they are more likely to wash their vehicle at a car wash are more likely to think that the water from a commercial car wash goes to a water treatment plant.
- Demographically....
 - Those that think that the water goes to a water treatment plant from a commercial car wash are significantly more likely to be in Quebec (56%), Ontario (56%) and Alberta (65%), have a university degree (59%), have an income of \$100k+ (66%) and be married (59%).
 - Those that think that water is absorbed into the land are significantly more likely to be 18-34 (6%), 65+ (6%), women (6%), have an income of \$40k or less (7%) and single (7%).



Q5. Where do you think water goes when it goes down the drains at a commercial car wash?
Base: All (n=1521).

Contact Information

For more information about this project, please contact:

Lisa Covens

Associate Vice President

lcovens@legermarketing.com

(416) 815 0330 ext. 104

Julie Thurgood

Project Manager

jthurgood@legermarketing.com

(416) 815 0330 ext. 119

Patrick Ryan

Senior Research Analyst

pryan@legermarketing.com

(416) 815 0330 ext. 121