

**Building Bridges Pollution Prevention Study**  
**Survey Instrument: Attitudes of Dry Cleaners Towards Wet Cleaning**  
**FINAL DRAFT**

**Interview Date:** \_\_\_\_\_

**Interviewer:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

Hello, my name is \_\_\_\_\_ and I am calling from the UCLA Empirical Research Group. We are conducting a survey of small business owners in your area. May I speak to \_\_\_\_\_? (VERIFY THAT PERSON LISTED IS OWNER OR MANAGER OF BUSINESS. IF NOT, GET NAME OF OWNER/MANAGER AND ASK TO SPEAK TO THAT PERSON. IF NOT AVAILABLE, ASK WHEN TO CALL BACK AND TERMINATE.)

(Hello, my name is \_\_\_\_\_/ As I said before) I am calling from the UCLA Empirical Research Group. UCLA is conducting a survey of dry cleaners in Southern California. We are asking questions about technology choices in dry cleaning. The survey will take about 15 minutes, and your answers will be kept completely confidential.

1. First I'd like to ask you about the economy in southern California. Over the next 12 months, do you think the economy in Southern California will grow stronger, will grow weaker, or will remain about the same?  
**(IF "STRONGER/WEAKER," ASK: "Is that much stronger/weaker or somewhat stronger/weaker?")**

- Much stronger ----- 1  
 Somewhat stronger ----- 2  
 Somewhat weaker----- 3  
 Much weaker ----- 4  
 Remain the same ----- 5  
**(DON'T READ) DK/NA ----- 6**

2. What do you think is the most important problem facing the dry-cleaning industry in your area?  
**(DO NOT READ LIST)**

- Environmental regulations/AQMD ----- 1  
 Cost of electricity ----- 2  
 Competition from budget cleaners ----- 3  
 Cost of natural gas ----- 4  
 Finding and retaining dependable workers ----- 5  
 People wearing more casual clothing----- 6  
 Finding and retaining rental space in shopping centers--- 7  
 Other: \_\_\_\_\_

3. Now I'm going to read you a list of problems that some other dry-cleaners have told us about. After I read each one I would like you to tell me if you think this is a serious problem for your business. **(IF YES, ASK: "Is that a very serious problem or a somewhat serious problem?") (READ LIST) (ROTATE)**

VERY      SW      NOT      (DK/  
SERIOUS    SERIOUS    SERIOUS    NA)

- [ ]a. Burdensome environmental regulations----- 1 ----- 2 ----- 3 ----- 4  
 [ ]b. There aren't enough customers to support all of the  
 dry cleaning businesses in this area----- 1 ----- 2 ----- 3 ----- 4  
 [ ]c. It is difficult to obtain financing to upgrade  
 or expand my business. ----- 1 ----- 2 ----- 3 ----- 4  
 [ ]d. Chemicals are hazardous to my  
 health and to the health of my employees ----- 1 ----- 2 ----- 3 ----- 4

4. I'm going to read you a list of different types of professional cleaning equipment. I would like you to tell me if you are very familiar, somewhat familiar, not too familiar or not at all familiar with that type of equipment **(ROTATE)**.

VERY      SOMEWHAT    NOT TOO    NOT AT ALL    (DK  
FAMILIAR    FAMILIAR    FAMILIAR    FAMILIAR    NA)

- [ ]a. PERC Machines----- 1 ----- 2 ----- 3 ----- 4 ----- 5  
 [ ]b. CO2 (SEE-OH-TWO) Machines ----- 1 ----- 2 ----- 3 ----- 4 ----- 5  
 [ ]c. Wet Cleaning Machines ----- 1 ----- 2 ----- 3 ----- 4 ----- 5  
 [ ]d. Petroleum Cleaning Machines ----- 1 ----- 2 ----- 3 ----- 4 ----- 5  
 [ ]e. Green Earth Machines ----- 1 ----- 2 ----- 3 ----- 4 ----- 5

5. We're interested in where you get your information about cleaning technology. I'm going to read you a list of sources that provide information about professional cleaning technology. After I read each one, please tell me if you consider this a very important source, a somewhat important source, or not an important source of information for your business. (ROTATE)

	VERY <u>IMPT</u>	SOMEWHAT <u>IMPT</u>	NOT <u>IMPT</u>	(DK/ <u>NA</u> )
[ ] a. Equipment and soap suppliers -----	1	2	3	4
[ ] b. Trade shows and publications-----	1	2	3	4
[ ] c. Other dry cleaners-----	1	2	3	4
[ ] d. Government agencies -----	1	2	3	4

6. If for some reason you had to replace your cleaning machine today, and your choices were (ROTATE) [ ]PERC cleaning, [ ]Wet cleaning, [ ]Petroleum cleaning, [ ]CO2 (SEE OH TWO) or [ ]Green Earth, which machine would be your first choice? And which machine would be your second choice? And which machine would be your third choice?

	<u>1<sup>st</sup> Choice</u>	<u>2<sup>nd</sup> Choice</u>	<u>3<sup>rd</sup> Choice</u>
PERC cleaning-----	1	1	1
Wet cleaning -----	2	2	2
Petroleum cleaning-----	3	3	3
CO2-----	4	4	4
Green Earth-----	5	5	5
(DON'T READ) None of these-----	6	6	6
(DON'T READ) DK/NA-----	7	7	7

**In this survey I am going to ask you some questions about the professional wet cleaning process. I am interested in learning how much you know about wet cleaning equipment and your concerns about using wet cleaning in your business. I will also ask your opinion about several programs that are designed to encourage dry cleaners to switch to the wet cleaning process.**

7. Before I say anything more about wet cleaning I would like to ask, if you had to replace one of your machines in the next six months, would you consider buying a professional wet cleaning system? (IF YES/NO ASK: "Is that definitely YES/NO, or only probably YES/NO?")

Definitely Yes -----	1
Probably Yes-----	2
Probably No-----	3
Definitely No -----	4
(DON'T READ) DK/NA -----	5

8. In your own words, what is your biggest concern or worry about professional wet cleaning? (DO NOT READ LIST)

And what is your second biggest concern or worry?

	<u>Biggest Concern</u>	<u>2<sup>nd</sup> Biggest Concern</u>
Clothes shrink/Damaged clothing/Harms garments-----	1	1
Expensive/Costs too much-----	2	2
Customers won't like it/I will lose business -----	3	3
Too technical/Too much training required-----	4	4
No suppliers/No manufacturers-----	5	5
It's risky/It's Untested/New technology-----	6	6
Government regulation-----	7	7
Care label rules require dry cleaning-----	8	8
Time/It takes longer to wet clean a garment-----	9	9
Wet cleaning requires hiring/retaining skilled labor -----	10	10
I don't know how to use it-----	11	11
Other1 -----	12	12
Other2-----	13	13
(DON'T READ) DK/NA -----	14	14

9. I am now going to read you a list of phrases. After I read each one, please tell me if you think the phrase is an accurate or an inaccurate description of the wet cleaning process. If you don't know if it is accurate or inaccurate, you can tell me that too.

**(IF ACCURATE/INACCURATE, ASK: "Is that very ACCURATE/INACCURATE or somewhat?") (ROTATE)**

VERY ACCURATE      SOMEWHAT ACCURATE      SOMEWHAT INACC      VERY INACC      DK, NA

- [ ] a. It uses significantly less electricity than dry cleaning machines ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] b. It is too expensive to train employees to operate ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] c. It is not subject to government regulations ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] d. Special presses are required ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] e. The quality of cleaning is excellent ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] f. Pressing garments takes too long ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] g. It could harm garments labeled "Dry Clean" ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] h. It is environmentally friendly ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] i. It shrinks clothes beyond repair ----- 1 ----- 2 ----- 3 ----- 4 ----- 5
- [ ] j. I will lose a lot of my customers if I switch to wet cleaning ----- 1 ----- 2 ----- 3 ----- 4 ----- 5

**In the next few questions I am going to tell you some things about the wet cleaning process that you may or may not already know. Each one is a true statement about wet cleaning. What I want you to think about when you hear each statement is whether it makes any difference in how you feel about using the wet cleaning process in relation to your business.**

10. Wet cleaning is safe for garments labeled "dry clean only." Some garments shrink after washing and drying, but special tensioning presses used in the wet cleaning process restore these garments to their original shape in only a few seconds without harm to the fabric. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

- Much more likely ----- 1
- Somewhat more likely ----- 2
- Somewhat less likely ----- 3
- Much less likely ----- 4
- (DON'T READ)** No Difference ----- 5
- (DON'T READ)** DK/NA ----- 6

11. The wet cleaning process is cheaper than dry cleaning. Some operating costs of wet cleaning equipment are higher, including pressing labor and detergent costs. But the equipment, maintenance, and regulatory costs of dry cleaning are higher, which makes wet cleaning less expensive overall. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

- Much more likely ----- 1
- Somewhat more likely ----- 2
- Somewhat less likely ----- 3
- Much less likely ----- 4
- (DON'T READ)** No Difference ----- 5
- (DON'T READ)** DK/NA ----- 6

**(ROTATE QUESTIONS 12 THRU 16)**

12. A number of dry cleaners in the United States and Europe have switched to professional wet cleaning. They have been able to successfully wet clean the full range of garments that they previously had dry-cleaned. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

Much more likely ----- 1  
 Somewhat more likely ----- 2  
 Somewhat less likely ----- 3  
 Much less likely ----- 4  
**(DON'T READ) No Difference ----- 5**  
**(DON'T READ) DK/NA ----- 6**

13. Wet cleaning takes longer than dry cleaning. Cleaners using the wet cleaning process can provide "same day" service, but are they unable to provide "one hour" service. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

Much more likely ----- 1  
 Somewhat more likely ----- 2  
 Somewhat less likely ----- 3  
 Much less likely ----- 4  
**(DON'T READ) No Difference ----- 5**  
**(DON'T READ)DK/NA ----- 6**

14. The wet cleaning process is not regulated by the government. A dry cleaner who switches to wet cleaning will be free from AQMD inspections, permits, fines and hazardous wastes. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

Much more likely ----- 1  
 Somewhat more likely ----- 2  
 Somewhat less likely ----- 3  
 Much less likely ----- 4  
**(DON'T READ) No Difference ----- 5**  
**(DON'T READ) DK/NA ----- 6**

15. Professional wet cleaners have to learn a new technology. Manufacturers recommend comprehensive training for any dry cleaner who wants to successfully convert to professional wet cleaning. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

Much more likely ----- 1  
 Somewhat more likely ----- 2  
 Somewhat less likely ----- 3  
 Much less likely ----- 4  
**(DON'T READ) No Difference ----- 5**  
**(DON'T READ)DK/NA ----- 6**

16. Major companies have invested in wet cleaning technology. Milnor, Unimac and Bow Permac have invested in their own lines of professional wet cleaning equipment. And suppliers like Laidlaw, Sanitone and R.R. Street sell wet cleaning detergent. Does knowing this make you more or less likely to buy a wet cleaning system? **(IF MORE/LESS LIKELY, ASK: Is that much MORE/LESS likely, or somewhat?)**

Much more likely ----- 1  
 Somewhat more likely ----- 2  
 Somewhat less likely ----- 3  
 Much less likely ----- 4  
**(DON'T READ) No Difference ----- 5**  
**(DON'T READ) DK/NA ----- 6**

17. Now that you've had a chance to consider the wet cleaning process a little more, I am going to ask you again, if you had to replace one of your machines in the next six months, would you consider buying a professional wet cleaning system? **(IF YES/NO ASK: "Is that definitely YES/NO, or only probably YES/NO?")**

Definitely Yes ----- 1  
 Probably Yes ----- 2  
 Probably No ----- 3  
 Definitely No ----- 4  
**(DON'T READ) DK/NA ----- 5**

18. I want you to think about your purchasing decisions for a moment. When you have purchased dry cleaning equipment in the past, how important has government regulation been in your decision? Please give me your answer on a scale of 1 to 10, with 1 being "not at all important" and 10 being "extremely important".

(record answer) \_\_\_\_\_

**Recent studies by the Air Quality Management District have led to more frequent inspections of dry cleaners, and stricter enforcement than ever before. The AQMD is imposing fines against dry cleaners discovered to be violating regulations.**

19. How important will AQMD's increased enforcement be in your decision to purchase new equipment in the future? Please give me your answer on a scale of 1 to 10, with 1 being "not at all important" and 10 being "extremely important".

(record answer) \_\_\_\_\_

**The AQMD is currently revising its rules concerning PERC dry cleaning. It is possible that these revisions could restrict the annual amount of PERC that can be used in each machine.**

20. What is the minimum amount of PERC you would need to use during the year in order to stay in business using your existing equipment. **(DON'T READ LIST)**

- Less than 35 gallons per year ----- 1
- 36-40 gallons per year----- 2
- 41-45 gallons per year----- 3
- 46-50 gallons per year----- 4
- 51-55 gallons per year----- 5
- 56-60 gallons per year----- 6
- 61-65 gallons per year----- 7
- 66-70 gallons per year----- 8
- 71-75 gallons per year----- 9
- 76-80 gallons per year----- 10
- 81-85 gallons per year----- 11
- 86-90 gallons per year----- 12
- 91-95 gallons per year----- 13
- 96-100 gallons per year ----- 14
- 101-110 gallons per year----- 15
- 111-120 gallons per year----- 16
- 121-130 gallons per year----- 17
- 131-140 gallons per year----- 18
- 141-150 gallons per year----- 19
- More than 150 gallons per year----- 20
- DK/NA----- 98

**Now I would like you to think about how you finance new equipment. Specifically, I would like your opinion about some programs that may be helpful to cleaners interested in purchasing wet cleaning equipment. One program is a reimbursement program. Wet cleaning equipment costs about \$35,000, including a wet clean washer and dryer system and two tensioning presses. The reimbursement program would give you some of that money back after you bought the machine.**

21. If the program gave you a refund of **(READ FROM LIST)**, would that make you more or less likely to purchase wet cleaning equipment, or would it not make a difference  
**(IF MORE/LESS LIKELY, ASK: "Is that much MORE/LESS likely, or somewhat?")**  
 And what if the refund was **(CONTINUE TO READ FROM LIST)**? Would that make you more or less likely to purchase wet cleaning equipment, or would it not make a difference?  
**(IF MORE/LESS LIKELY, ASK: "Is that much MORE/LESS likely, or somewhat?")**  
**(REPEAT UNTIL LIST IS COMPLETED)**

- |  | <u>MUCH</u><br><u>MORE</u><br><u>LIKELY</u> | <u>SW</u><br><u>MORE</u><br><u>LIKELY</u> | <u>SW</u><br><u>LESS</u><br><u>LIKELY</u> | <u>MUCH</u><br><u>LESS</u><br><u>LIKELY</u> | <u>NO</u><br><u>DIFF</u> | <u>(DK/</u><br><u>NA)</u> |
|--|---|---|---|---|--------------------------|---------------------------|
| a. Thirty-five hundred dollars (\$3,500)-----                  | 1-----                                      | 2-----                                    | 3-----                                    | 4-----                                      | 5-----                   | 6-----                    |
| b. Seven thousand dollars (\$7,000)-----                       | 1-----                                      | 2-----                                    | 3-----                                    | 4-----                                      | 5-----                   | 6-----                    |
| c. Ten thousand five hundred dollars (\$10,500)----            | 1-----                                      | 2-----                                    | 3-----                                    | 4-----                                      | 5-----                   | 6-----                    |
| d. Fourteen thousand dollars (\$14,000)-----                   | 1-----                                      | 2-----                                    | 3-----                                    | 4-----                                      | 5-----                   | 6-----                    |
| e. Seventeen thousand five hundred dollars<br>(\$17,500) ----- | 1-----                                      | 2-----                                    | 3-----                                    | 4-----                                      | 5-----                   | 6-----                    |

**Another program would provide an income tax credit for dry cleaners who purchase wet cleaning equipment. Dry cleaners who make enough money to pay income taxes would have their tax bill reduced by some portion of the equipment purchase price.**

22. If you could get a tax credit for one-half of the cost of new wet cleaning equipment, would it make you more or less likely to purchase wet cleaning equipment, or would it not make a difference?  
 (IF MORE/LESS LIKELY, ASK: "Is that much MORE/LESS likely, or somewhat?")

- Much more likely ----- 1
- Somewhat more likely ----- 2
- Somewhat less likely ----- 3
- Much less likely ----- 4
- No Difference----- 5
- (DON'T READ) DK/NA ----- 6

23. How confident are you that you could learn to operate a successful wet cleaning facility if you received the proper training: very confident, somewhat confident, not very confident, or not confident at all.

- Very confident----- 1
- Somewhat confident----- 2
- Not very confident ----- 3
- Not confident at all ----- 4

**I'm almost done. The following questions are for statistical purposes only.**

24. How many PERC machines do you use at your shop to clean garments?(IF "0" GO TO 25) \_\_\_\_\_

- a) How old is your (oldest) PERC machine? ----- years
- b) How many years do you think it will be before you need to replace this machine? ----- years

(ASK IF MORE THAN ONE PERC MACHINE MENTIONED IN QUESTION 24)

- c) How old is your newest PERC machine? ----- years
- d) How many years do you think it will be before you need to replace this machine? ----- years

25. Approximately how many garments do you dry clean on the average business day?

(RECORD NUMBER) -----

26. How would you compare the prices you charge to other dry cleaners in your immediate area. Would you say your prices are below average, average, or above average?

- Below average----- 1
- Average----- 2
- Above average----- 3
- (DON'T READ) DK/NA ----- 4

27. How many years have you been in the dry cleaning business, either running this business or working for someone else?

(RECORD NUMBER)----- Years

28. Were you born in the United States?

- Yes ----- 1
- No ----- 2
- (DON'T READ) DK/NA ----- 3

29. Some people consider themselves to be a member of one racial or national or ethnic group. Do you consider yourself part of one ethnic or racial or national group? (IF YES, ASK: "Please tell me which group do you consider yourself to be a member of?") (DON'T READ LIST)

- No, don't consider myself part of a group ----- 0
- African-American/Black----- 1
- Armenian ----- 2
- Caucasian/White ----- 3
- Chinese ----- 4
- Eastern European ----- 5
- Indian/Pakistani ----- 6
- Korean ----- 7
- Latino ----- 8
- Other Asian ----- 9
- Vietnamese----- 10
- Other: ----- 11

30. Would you please tell me the year you were born? (DON'T READ LIST)

- 1983 - 1977 (18-24) ----- 1
- 1976 - 1972 (25-29) ----- 2
- 1971 - 1967 (30-34) ----- 3
- 1966 - 1962 (35-39) ----- 4
- 1961 - 1957 (40-44) ----- 5
- 1956 - 1952 (45-49) ----- 6
- 1951 - 1947 (50-54) ----- 7
- 1946 - 1942 (55-59) ----- 8
- 1941 - 1937 (60-64) ----- 9
- 1936 - 1932 (65-69) ----- 10
- 1931 - 1927 (70-74) ----- 11
- 1926 OR EARLIER (75 & over)----- 12
- (DON'T READ) DK/NA ----- 98

31. At present, there is a program available to dry cleaners that gives cleaners \$22,000 towards the purchase of wet cleaning equipment, and which provides training and technical support. Have you heard of this program?

- Yes ----- 1
- No ----- 2
- (DON'T READ) DK/NA ----- 3

32. Are you interested in receiving additional information about that program?

- Yes ----- 1
- No ----- 2
- (DON'T READ) DK/NA ----- 3

33. Sometimes the people we talk to agree to let us call them back to ask a few more questions. Would it be alright with you if researchers from UCLA contacted you to talk about some of the subjects discussed in this survey?

- Yes ----- 1
- No ----- 2
- (DON'T READ) DK/NA ----- 3

THANK RESPONDENT AND END INTERVIEW