A high-speed photograph of water splashing, with several large, clear water droplets suspended in the air above the main splash. The background is a soft, light blue gradient.

Understanding Consumers' Behavior & Knowledge of Professional Garment Cleaning in NYS

Survey Results

New York State Pollution Prevention Institute
Rochester Institute of Technology
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Acknowledgements

Written by

Kate Winnebeck
Senior Environmental Health & Safety Specialist

Jarrett Plante
Marketing Assistant

Val Pizzo
Marketing Assistant

Disclaimer

Any opinions, findings, and conclusions or recommendations expressed are those of the authors' and do not necessarily reflect the views of the New York State Department of Environmental Conservation (NYSDEC).



New York State Pollution Prevention Institute
Rochester Institute of Technology
111 Lomb Memorial Drive
Rochester, NY 14623
Web: www.nysp2i.rit.edu
Email: info@nysp2i.rit.edu
Phone: 585-475-2512

Executive Summary

This document summarizes the results of a survey in New York State (NYS) conducted by the New York State Pollution Prevention Institute (NYSP2I) in February through May 2015. The purpose of the survey is to understand what New York State consumers know about dry cleaning and wet cleaning, the factors that are considered when consumers select a garment cleaner, and those things that influence the use and preference for an environmentally friendly garment cleaner. Survey results will contribute to the development of NYSP2I's consumer outreach and education component of the NYS Professional Wet Cleaning Program.

A total of 1,059 valid survey responses were received. The respondents were from all across New York State.

Results

The survey is divided into four areas and highlights of the results from each area are below.

Garment Cleaning Knowledge & Use

- Just over half (53%) of respondents have used professional garment cleaning in the last year
- 86% of respondents don't know what solvent their garment cleaner uses in the cleaning process
- 17% of respondents have heard of professional wet cleaning
- 27% of respondents correctly responded that dry cleaning uses a liquid to clean clothes, and 61% of respondents correctly responded that wet cleaning uses a liquid to clean clothes

Professional Wet Cleaning Knowledge & Use

- 64% of respondents that have used a professional wet cleaner did so specifically because they wet clean
- Most respondents that have used a professional wet cleaner are located in a metropolitan area
- When asked what they know about professional wet cleaning, 34% of respondents said it is more environmentally friendly than perc/dry cleaning, 37% said they knew nothing and had only heard of it, 8% said they thought it was environmentally damaging, and 3% said they thought it was the same as doing laundry at home
- Online articles and friends and/or family are the most popular methods by which respondents have received wet cleaning information

Factors when Selecting a Cleaner

- *Location* and *price* are the most significant factors when choosing a garment cleaner; *environmental impact* ranked 5 out of 7
- 52% of respondents are *most likely* or *definitely* would use garment cleaning services more if they were advertised as environmentally friendly
- 35% of respondents have *no preference* in the terms used to advertise a cleaner; 30% prefer *natural*, 15% *organic*, and 6% prefer *professional wet cleaning*
- A majority of respondents will switch to an environmentally friendly cleaner that charges less or the same or is located in a more preferable or same location as their current cleaner
 - About 50% are willing to pay 10% more for a cleaner advertised as environmentally friendly

- Consumers are more willing to spend 10% more than travel to a less preferred location for an environmentally friendly garment cleaner

Preference for Environmentally Friendly Products

- 75% of respondents who have used a wet cleaner also seek out environmentally friendly products often or always, and respondents who always seek out environmentally friendly products are more likely to have used a wet cleaner in the past
- Respondents who always or often seek environmentally friendly products prefer cleaners advertised as natural and organic, while those who sometimes or rarely seek environmentally friendly products prefer cleaners advertised as natural and dry cleaner
- 74% of respondents who always seek out environmentally friendly products would most likely or definitely use garment cleaners more often if they were advertised as environmentally friendly
- Respondents that identify themselves as frequently seeking out environmentally friendly products are willing to pay 10% more and travel to a less preferred location for an environmentally friendly cleaner

Conclusion

Opportunities to educate both consumers and garment cleaners have emerged from the survey results.

Results show a lack of dry and professional wet cleaning knowledge and awareness among consumers. The majority of respondents (86%) don't know what solvent their garment cleaner uses for cleaning and only 17% have heard of professional wet cleaning. Furthermore, only 27% of respondents correctly identified that dry cleaning uses a liquid to clean garments. This shows that consumers lack a basic understanding of the dry and professional wet cleaning processes as well as the process their own cleaner uses.

Results show multiple ways to target a consumer education campaign. Targeting metropolitan areas, consumers over the age of 45 that frequently dry clean, those who identify themselves as someone who frequently seeks out environmentally friendly products, and using online articles and friends and/or family as a method of information distribution will help reach the highest number of users of professional wet cleaning and consumers most likely to use a professional wet cleaner.

Results show an opportunity for cleaners to increase their business by advertising as environmentally friendly. Cleaners may convert to professional wet cleaning with the understanding that the conversion may increase their business. Sharing these survey results with cleaners will bring awareness around advertising opportunities and willingness of consumers to switch to environmentally friendly cleaners. This is also an opportunity for NYSP2I to potentially develop an education and outreach campaign for cleaners, which could include a wet cleaner recognition program. It is recommended that NYSP2I and New York state work together to explore such a program.

Next Steps

The results of this survey will be used to develop a consumer education campaign as part of NYSP2I's Professional Wet Cleaning Program. Materials will be developed and distributed to the public and other users of professional garment cleaning services across New York State.

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Definitions

Professional garment cleaning refers to any time clothes are brought to a business for cleaning such as a dry cleaner, launderer or professional wet cleaner.

Dry cleaning is a process that uses solvents other than water to clean garments typically labeled “dry clean only”.

Professional wet cleaning is a process that uses sophisticated equipment and water to clean clothes that would normally be dry cleaned.

I. Background

The New York State Pollution Prevention Institute (NYSP2I) is addressing the use of perchloroethylene (perc) in the New York state garment cleaning industry by promoting professional wet cleaning, an economically and environmentally preferable alternative. The goal is to reduce the amount of perc used by dry cleaners by converting them to more environmentally friendly alternative technologies. NYSP2I has conducted research on perc use in New York state garment cleaning and explored alternatives to perc.

Much of NYSP2I's previous work in this sector has focused on providing education to dry cleaners on alternative solvents as well as executing a professional wet cleaning conversion and demonstration program. The next step is to expand education and outreach to dry cleaning consumers, to further drive the use of perc alternatives within the industry in New York.

The goal of the *Understanding Consumers' Behavior & Knowledge of Professional Garment Cleaning in NYS* survey is to understand what consumers know about dry and professional wet cleaning, the factors that are considered when consumers select a garment cleaner, and those things that influence the use and preference for an environmentally friendly cleaner. Any differences in these areas between consumers located in rural and urban areas and between consumers located within New York City and Long Island and upstate New York are also of interest. Survey results will contribute to the development of the consumer outreach and education component of NYSP2I's Professional Wet Cleaning Program.

2. Survey Development

The survey was developed by NYSP2I and completed using the online software service SurveyGizmo (<https://www.surveygizmo.com/>). Skip logic was used throughout the survey, allowing future questions to be asked based on the response to previous questions. This allowed correlations to be made, such as associating those who identify themselves as a seeker of environmentally friendly products with their use of professional wet cleaning.

The survey was distributed through NYSP2I's social media accounts, NYSP2I listserv e-mail blasts, and partner e-mail lists. The survey was also made available via laptop at events NYSP2I attended. Responses were collected from February 1 through May 7, 2015. To gain responses, a sweepstakes for a \$150 Visa gift card was offered. Entrants were restricted to those at least 18 years of age and New York residents.

A total of 1,532 respondents started the survey and 1,176 surveys were completed; a response rate of 77%. Non-NYS residents accounted for 108 of the surveys (about 9%), and 9 of the NYS respondents were under age 18, resulting in a total of 1,059 valid survey responses. Results from all respondents who are NYS residents and are over the age of 18 were analyzed and are included in this report.

The survey is divided into four areas, with a series of questions for each:

1. Garment Cleaning Knowledge & Use
2. Professional Wet Cleaning Knowledge & Use
3. Factors when Selecting a Cleaner
4. Preference for Environmentally Friendly Cleaner

The following section includes results of the survey. The full survey is provided as an Appendix to this report.

Garment Cleaning Knowledge & Use

More than half of respondents (52%) do not use professional garment cleaning services; 37% of those who do, generally use them 1-4 times per year. Approximately 10% of respondents use professional garment cleaning services at least once per month. Based on survey respondent data, consumers who are in the 18-29 age range use garment cleaning services much less than older consumers. Respondents who are 18-29 years of age are twice as likely (64%) compared to people who are 45 years or older (32%) to never use professional garment cleaning services. Overall, males are slightly more likely to use garment cleaning services than females. (Figure 2) About 61% of all respondents are *not at all knowledgeable* about the dry cleaning process, while 37% are *somewhat knowledgeable*, and 2% are *expertly knowledgeable*. Similarly, about 86% of respondents who use dry cleaning services are unsure what solvent their cleaner uses (Figure 3). This is in line with 98% of respondents being *somewhat knowledgeable* or *not at all knowledgeable* about the dry cleaning process.

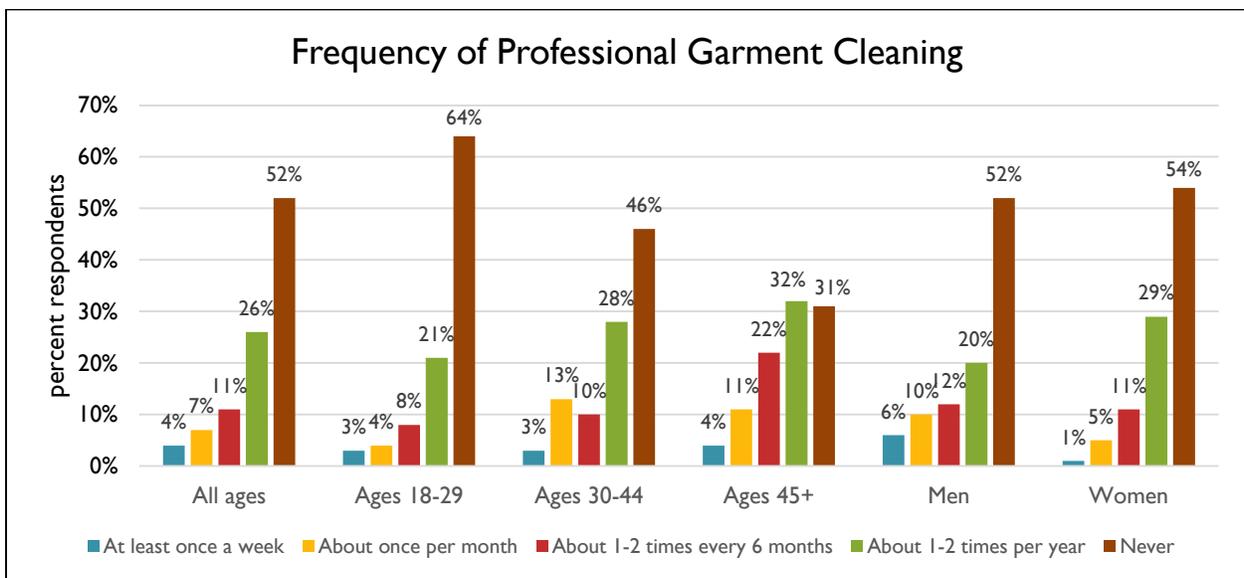


Figure 2. Number of times over the last year respondents used professional garment cleaning services

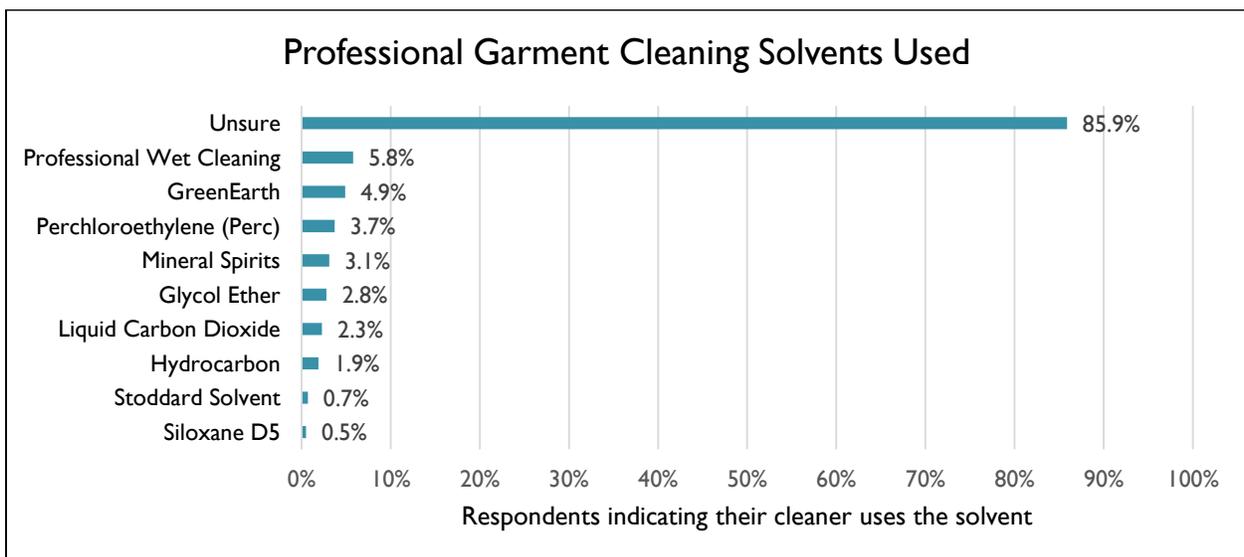


Figure 3: Professional Garment Cleaning Solvents Used

When asked what dry cleaning solvents respondents have heard of, less than half of respondents have not heard of any of the solvents listed in Figure 4, and at least 10.8% of respondents who *never* dry clean, have heard of at least one dry cleaning solvent. Professional wet cleaning is more known than Stoddard solvent, and siloxane d5; it is less known than GreenEarth®, hydrocarbon, perc, and mineral spirits.

Note that GreenEarth® uses siloxane d5 (decamethylcyclopentasiloxane) in its cleaning process and respondents are much more aware of the tradename GreenEarth® than the chemical name siloxane d5. Mineral spirits and Stoddard solvent are synonyms for paint thinner; it is not clear if respondents are aware of mineral spirits and Stoddard solvent specifically in the dry cleaning process or are aware of the solvents because of their other uses.

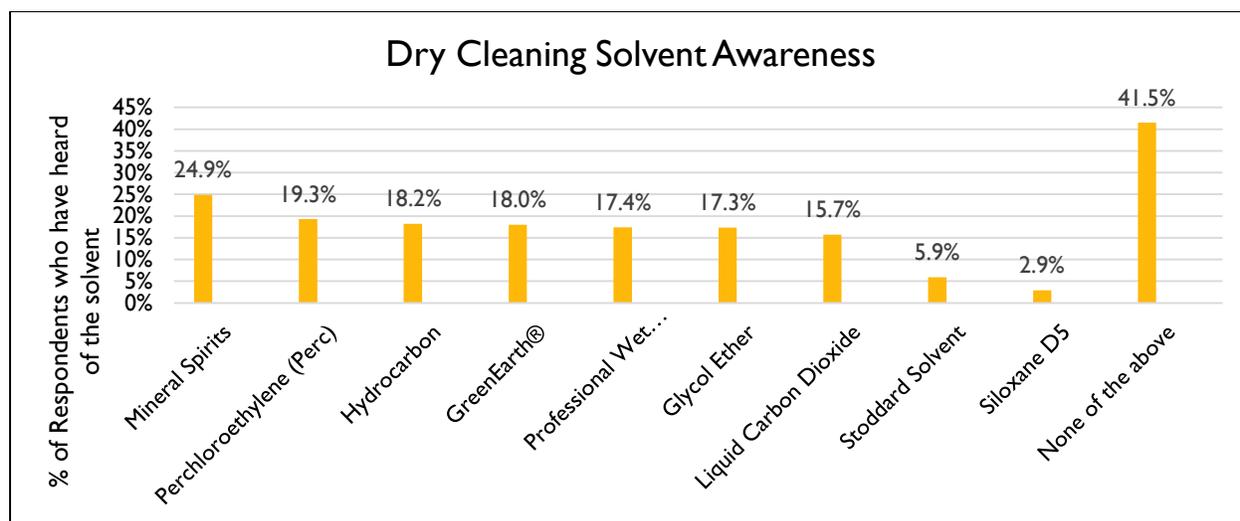


Figure 4: Dry Cleaning Solvent Awareness

Only 27% of respondents correctly state that dry cleaning uses a *liquid* to clean clothes (Figure 5) while 62% correctly said that wet cleaning uses a *liquid*. This shows that the public may inherently think that dry cleaning doesn't use liquid because of the name.

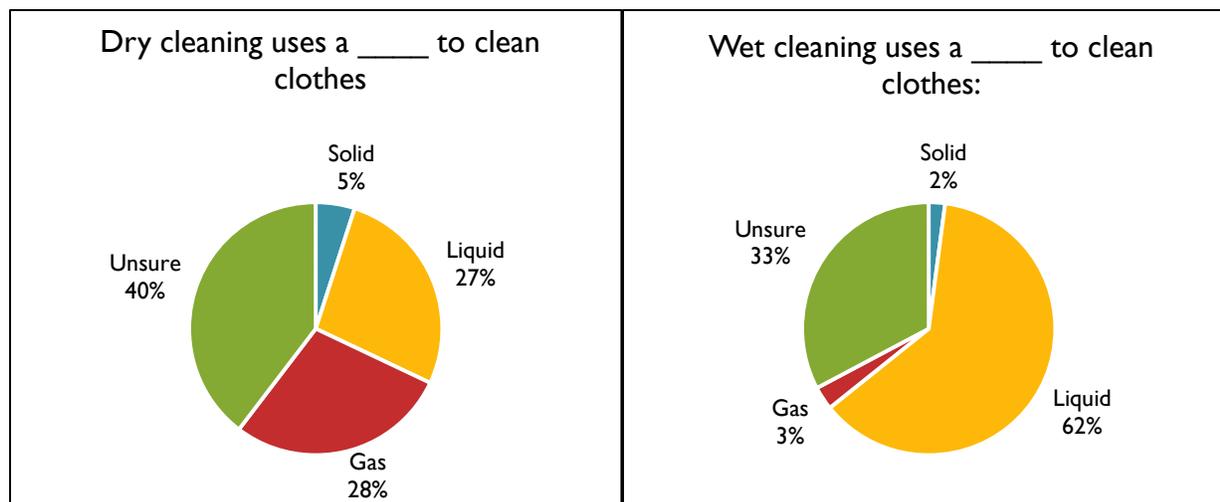


Figure 5: Dry & Wet Cleaning Solvent Knowledge

Professional Wet Cleaning Knowledge & Use

Of the 2.6% of respondents (28) that have used a professional wet cleaner, more than half (61%) choose the cleaner *specifically because they professionally wet clean*. Furthermore, 16% of the respondents (3 out of 18) who chose their cleaner specifically for professional wet cleaning also use professional garment cleaning services weekly.

Location & Wet Cleaning Use

Respondents' zip codes were compared to their use of professional wet cleaning. New York City, Buffalo, Utica, Albany, and other metropolitan areas each had one respondent that indicated they have used professional wet cleaning. More than half of respondents that have used professional wet cleaning (19 of 33) are located in the greater Rochester area. Similarly, 72% of respondents (13 of 18) who said that they chose their cleaner specifically because they use professional wet cleaning are in the greater Rochester area. This is to be expected as 68% of all survey respondents are in Monroe County, where Rochester is located.

Characteristics of Professional Wet Cleaning

Those respondents that have used a professional wet cleaner were asked what they know about professional wet cleaning in open response format. The responses were categorized and Figure 6 shows a summary of the responses. The most popular statement was that people “know nothing” or had “only heard of it”, followed by respondents stating that professional wet cleaning is “more environmentally friendly”. About 3.4% of respondents inaccurately said that it is the “same as washing at home” and 8.4% said that professional wet cleaning is “environmentally damaging”.

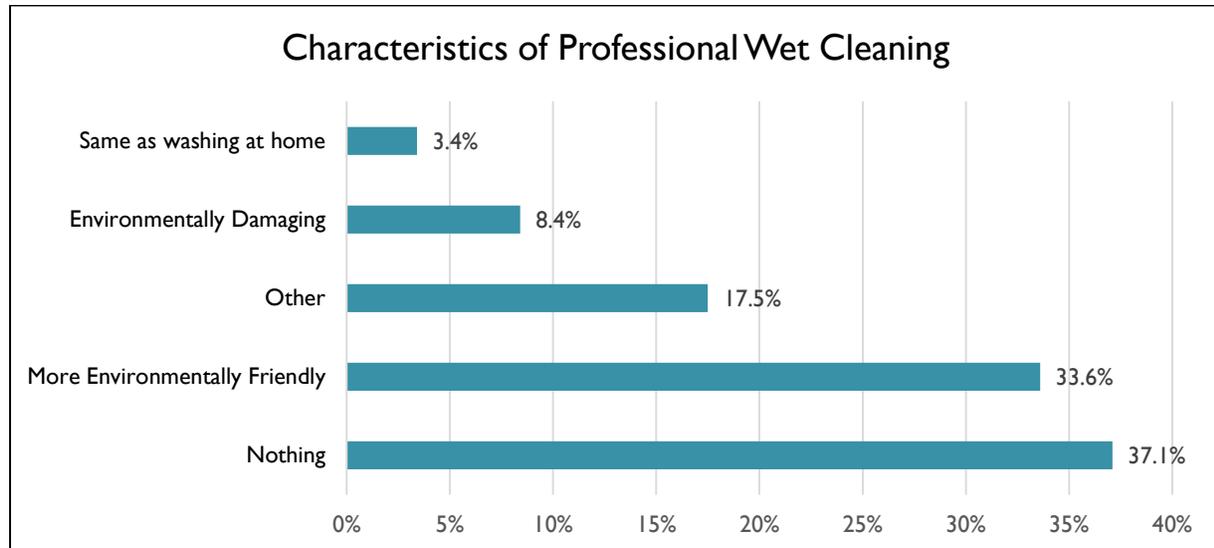


Figure 6: Characteristics of Professional Wet Cleaning

Sources of Professional Wet Cleaning Information

Online articles were the most common way respondents learned about professional wet cleaning, followed closely by *friends and/or family*. This presents an opportunity for online education, and may be especially ripe for social media, since respondents could view/receive the information online and also share information with friends and family using this media. Respondents may be apt to open an article shared on Facebook or Twitter from friends and family, for example.

Other sources include work (9), class (2), Facebook (1), TV (1), radio (1), and NYSP2I demonstration (1).

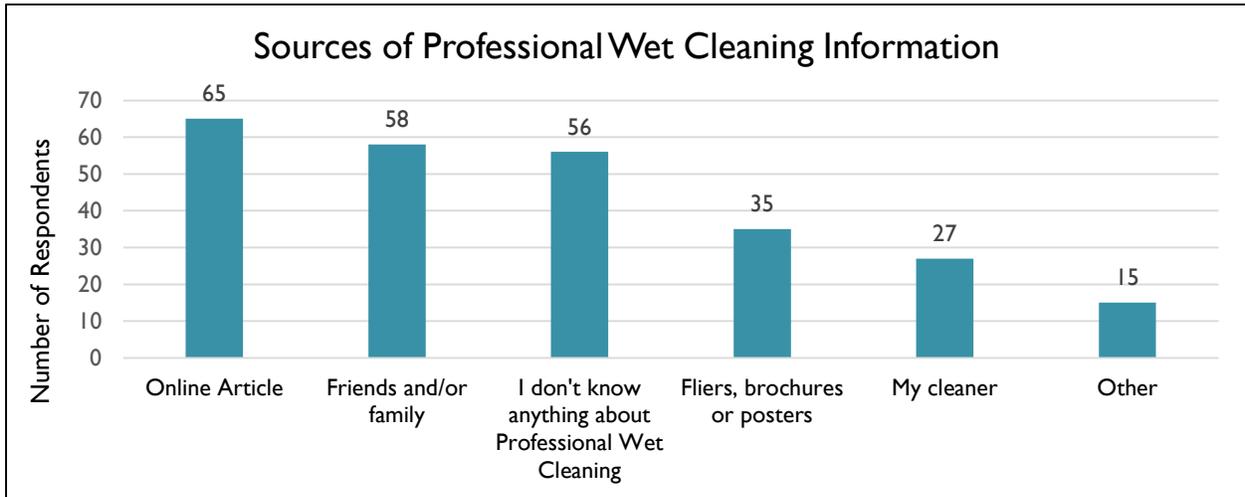


Figure 7: Sources of Professional Wet Cleaning Information

Factors when Selecting a Garment Cleaner

Respondents were asked to rank factors from highest to lowest priority when selecting a garment cleaner. These rankings were weighted in order to arrive at the rankings shown in Figure 8. *Location* and *price* are the most significant factors when choosing a garment cleaner and *environmental impact* is ranked fifth out of the seven options provided, showing that in general, consumers care about environmental impact less than *location*, *price*, and *past experiences*, and about the same as the cleaner's *operating hours*.

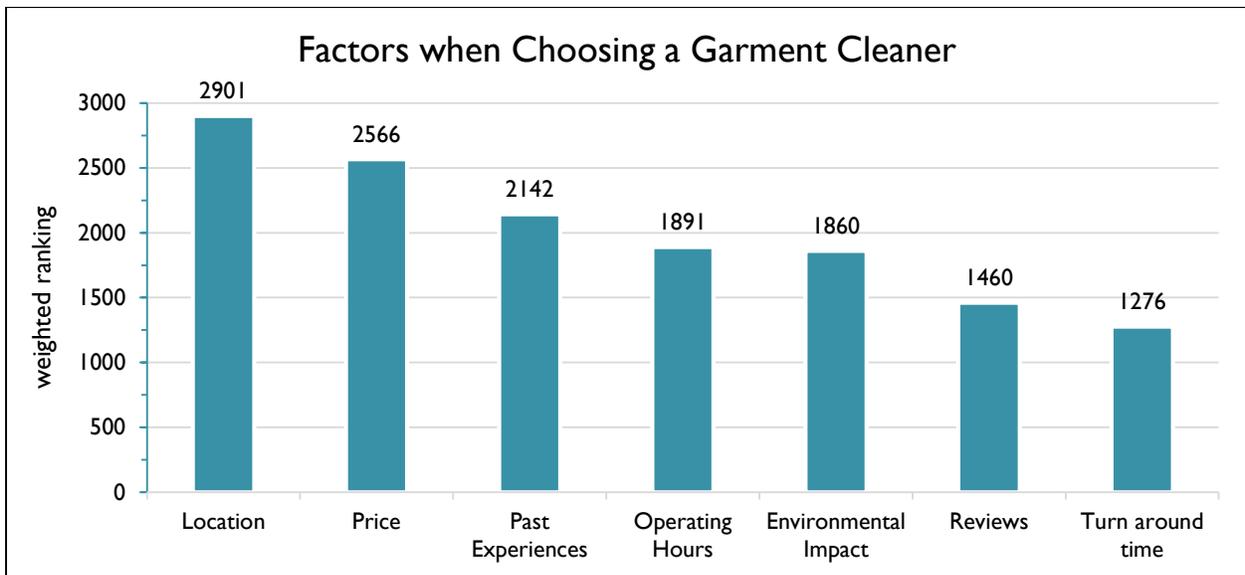


Figure 8: Factors When Choosing a Garment Cleaner

Garment Cleaner Advertising

Respondents were asked if they would use garment cleaning services more if they were advertised as environmentally friendly, and more than half (52%) of respondents said they would *most likely* or *definitely* use services more. Only 2.5% of respondents said they would *definitely not* use garment cleaning services

more. This indicates that consumers may be willing to use garment cleaning services more frequently when advertised as environmentally friendly.

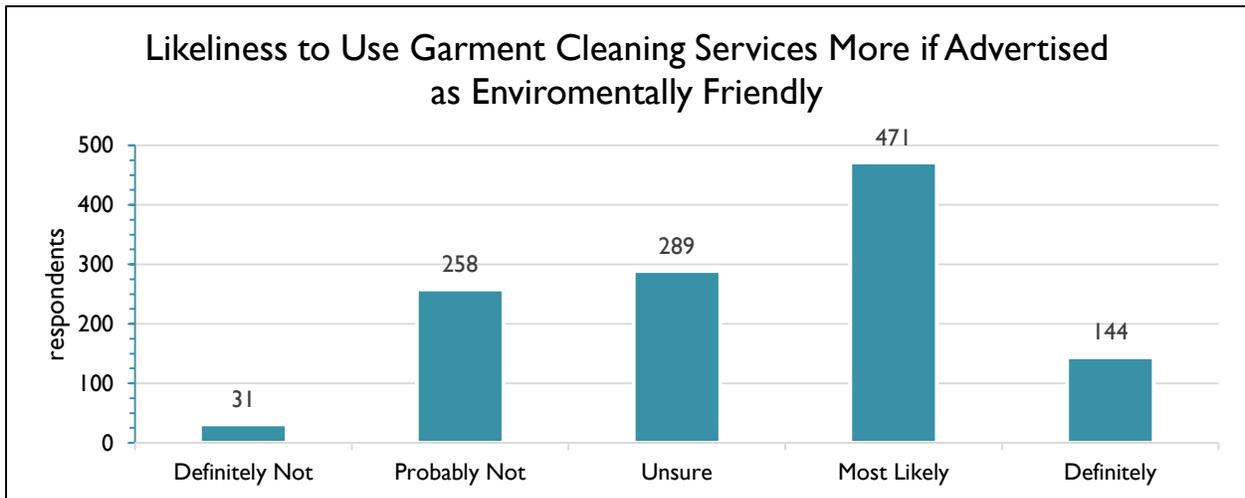


Figure 9: Likelihood to use garment cleaning services more if advertised as environmentally friendly

When given the choice between garment cleaners advertised as *natural*, *organic*, *dry cleaner*, and *wet cleaner*, more than one third of respondents (35%) indicated they have *no preference* in the advertising terminology. Furthermore, when comparing the location of respondents to the type of cleaner they would choose based on the advertised name, no trends were apparent. However, as shown in Figure 10 below, *professional wet cleaning* is preferred by 6% of respondents. The words *natural* (30%) and *organic* (15%) were the most popular choices for respondents who indicated a preference. These results indicate that professional wet cleaning may be more successfully promoted using alternate terminology, such as *natural* or *organic*.

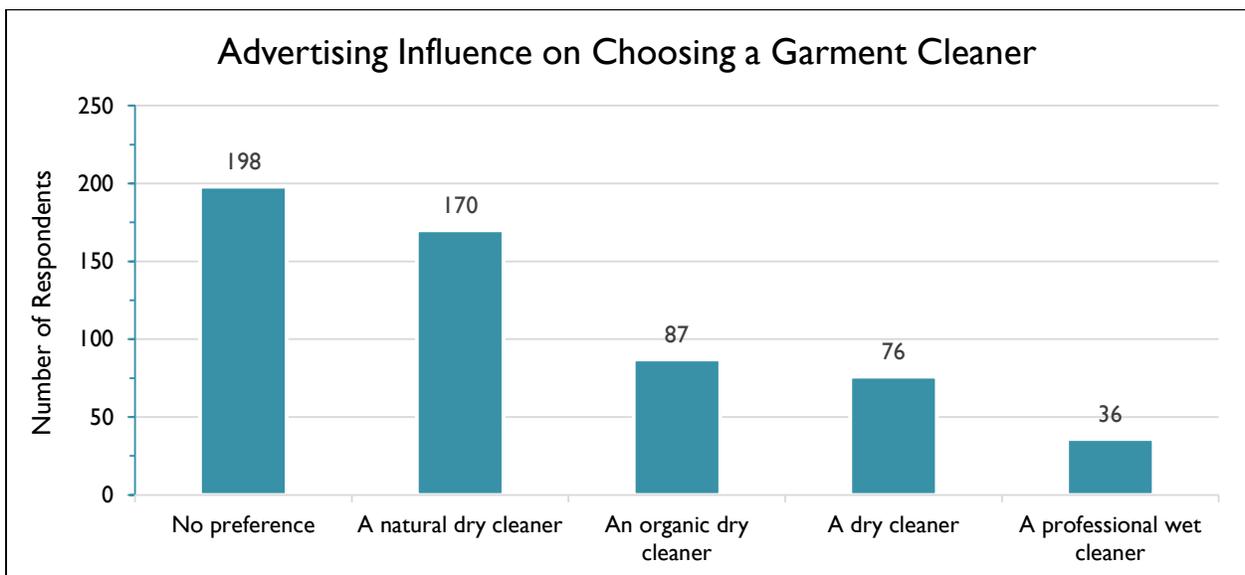


Figure 10: Preference for cleaners based on advertising language

Willingness to Switch to Environmentally Friendly Cleaner

Figure 11 below shows that the majority of respondents are willing to switch to a more environmentally friendly cleaner if the cleaner *charges 10% less* or the *same price* as their current cleaner. Nearly half of respondents are willing to pay *10% more* to use a more environmentally friendly cleaner than their current cleaner.

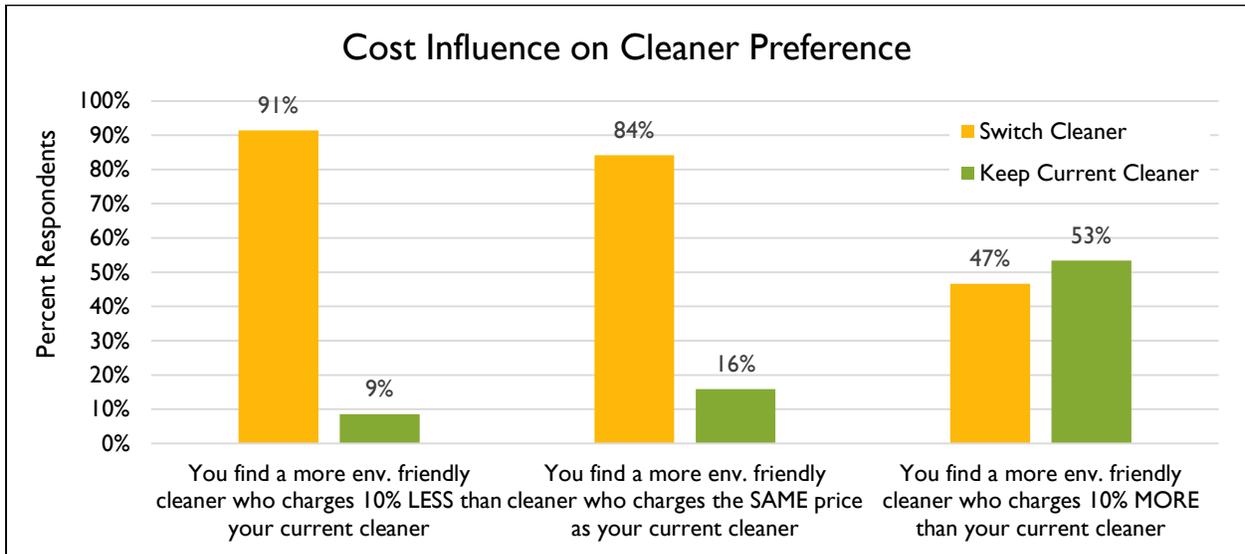


Figure 11: Cost influence on cleaner preference

Figure 12 shows a similar result; the majority of respondents are willing to switch to a more environmentally friendly cleaner that is *in a more preferred location* or *about the same location* as their current cleaner. When comparing the influence of cost and location on the willingness of respondents to switch to a more environmentally friendly cleaner, respondents are more willing to pay *10% more* for an environmentally friendly cleaner than they are to travel to a *less preferred location*.

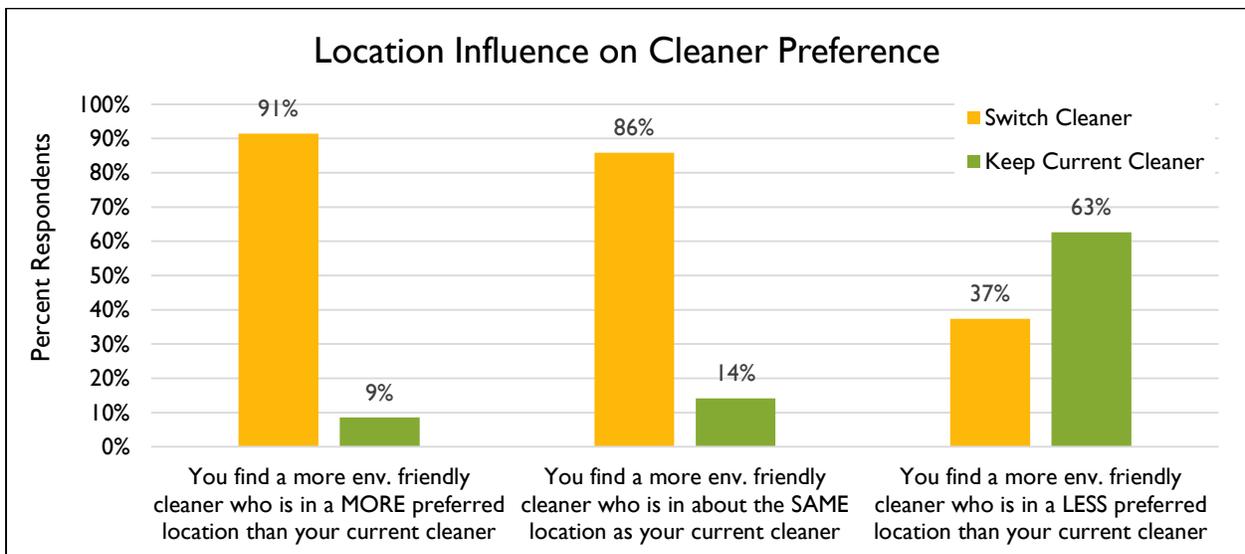


Figure 12: Location influence on cleaner preference

Preference for Environmentally Friendly Products

Wet Cleaning Use

As shown in Figure 13, three quarters (75%) of respondents who said they've used a professional wet cleaner also said that they seek out environmentally friendly products *often* or *always*. While 32% of respondents who seek out environmentally friendly products *often* or *always* said that they've used a cleaner who wet cleans, respondents who *always* seek out environmentally friendly products are more likely to have used a professional wet cleaner in the past.

The majority of those who have *never* used a wet cleaner are those who *sometimes*, *often*, or *always* seek environmentally friendly products. In fact, 45% of those who *sometimes*, *often*, or *always* seek environmentally friendly products have not used a wet cleaner and 37% are unsure if they have. This shows that consumers who frequently seek environmentally friendly products have not used or are unsure if they have used a professional wet cleaner. It is unclear whether these consumers realize that professional wet cleaning is an environmentally preferable option.

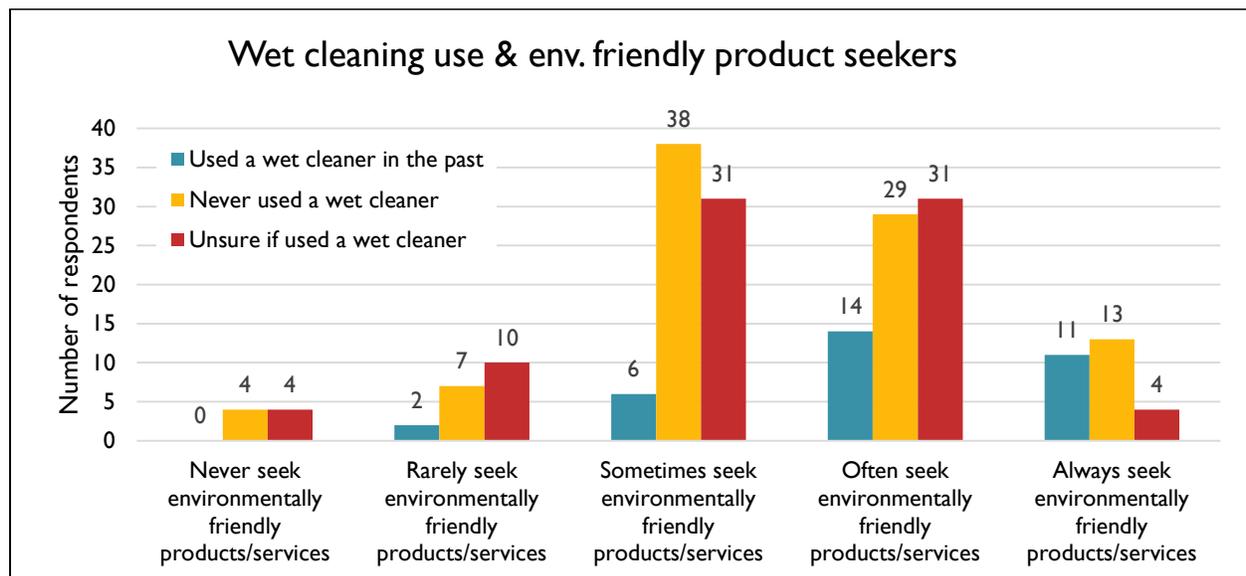


Figure 13: Wet cleaning use & environmentally friendly product seekers

Preference for Wet Cleaning

When indicating preference for environmentally friendly terminology, 10% of respondents that *always* and 8% of respondents that *often* choose *environmentally friendly products* prefer a cleaner advertised as *professional wet cleaner*, as shown in Figure 14. While all respondents, regardless of their preference for environmentally friendly products prefer a *natural dry cleaner*, respondents that *always* and *often* seek out *environmentally friendly products* also prefer an *organic dry cleaner* and respondents that *sometimes* and *rarely* seek out *environmentally friendly products* prefer a *dry cleaner*. These results highlight the importance of advertising terminology on the preference – and ultimately use – of garment cleaning establishments. Results also indicate respondents that choose environmentally friendly products more frequently may be more aware and knowledgeable of the technical terminology than those who are not as immersed in environmentally conscious activities.

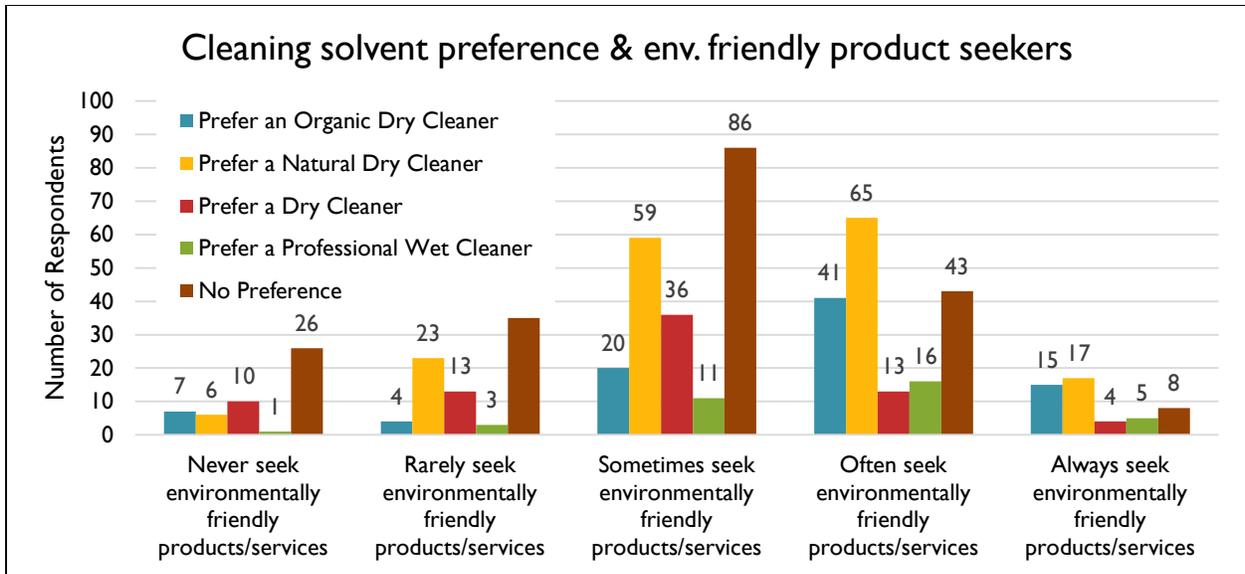


Figure 14: Cleaning solvent preference and environmentally friendly product seekers

Garment Cleaner Advertising

Just over half (51%) of respondents said they would either *most likely* or *definitely* use professional garment cleaning more if their cleaner were advertised as environmentally friendly. Nearly three quarters (74%) of respondents who *always seek out environmentally friendly services* said they would *most likely* or *definitely* use garment cleaners more often if they were advertised as environmentally friendly. Similarly, 59% of respondents who *often seek out environmentally friendly services* would *most likely* or *definitely* use garment cleaners more often if they were advertised as environmentally friendly.

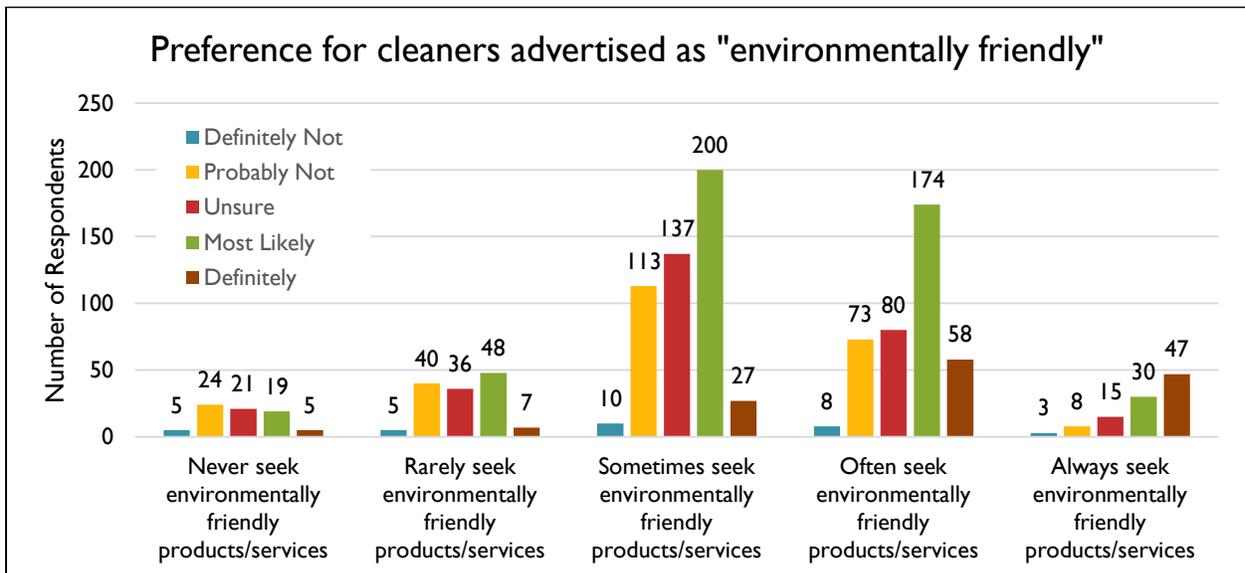


Figure 15: Preference for cleaners advertised as environmentally friendly

Willingness to Switch to Environmentally Friendly Cleaner

About 65% of respondents that *often or always seek environmentally friendly products and services* would switch cleaners if they found an environmentally friendly cleaner that charges 10% more than their current cleaner, and respondents who *always seek environmentally friendly products* are more willing to spend 10% more for an environmentally friendly cleaner than respondents who *never, rarely, sometimes, or often seek environmentally friendly products*. Figure 16 also shows that the majority of respondents that *never, rarely, or sometimes seek environmentally friendly products and services* would keep their current cleaner rather than switch to an environmentally friendly cleaner that charges 10% more.

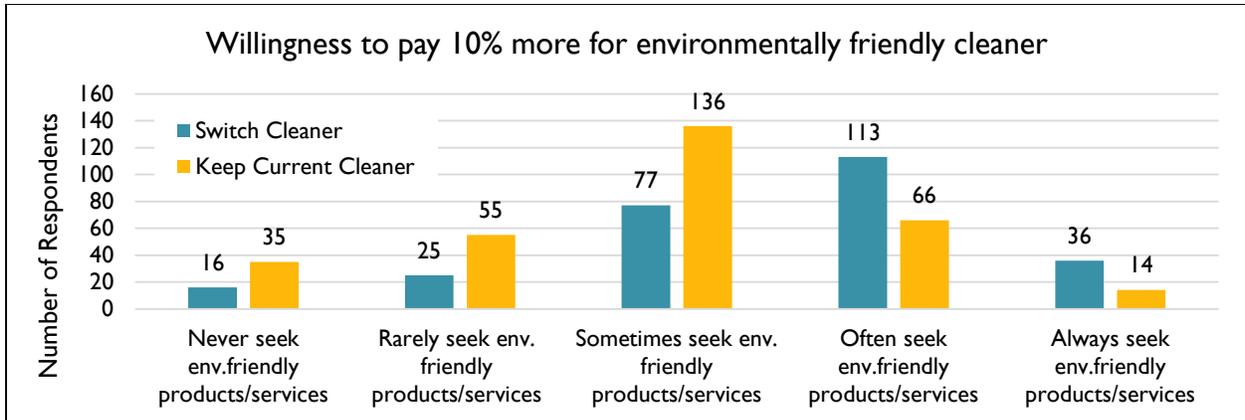


Figure 16: Willingness to pay more for an environmentally friendly cleaner

When considering the location of an environmentally friendly cleaner, 57% of respondents that *often or always seek environmentally friendly products and services* would switch cleaners if they found an environmentally friendly cleaner that is in a less preferable location, and respondents who *always seek environmentally friendly products* are slightly more willing to switch to a cleaner in a less preferred location than respondents who *often seek environmentally friendly products*. Figure 17 shows that the majority of respondents that *never, rarely, or sometimes seek environmentally friendly products* would keep their current cleaner rather than switch to an environmentally friendly cleaner in a less preferred location.

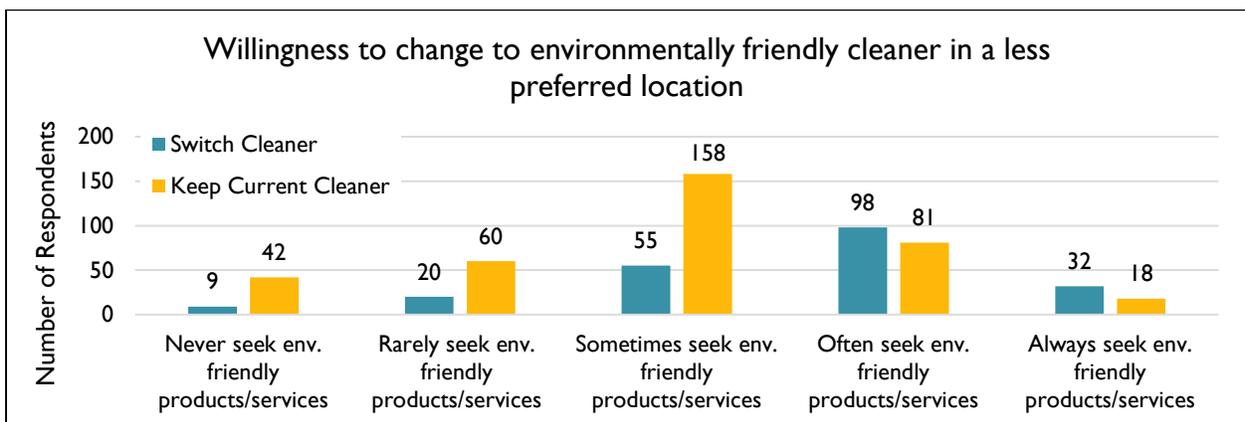


Figure 17: Willingness to change to environmentally friendly cleaner in a less preferred location

Figure 16 and Figure 17 show that respondents that identify themselves as frequently seeking out environmentally friendly products and services are willing to pay 10% more and travel to a less preferred location for an environmentally friendly cleaner.

4. Conclusions and Next Steps

While about half of all survey respondents have used professional garment cleaning in the last year, opportunities to educate both consumers and garment cleaners have emerged from the survey results.

Results show a lack of dry and professional wet cleaning awareness among consumers. The majority of respondents (86%) don't know what solvent their garment cleaner uses for cleaning and only 17% have heard of professional wet cleaning. Furthermore, 27% of respondents correctly responded that dry cleaning uses a liquid to clean clothes, and 61% of respondents correctly responded that wet cleaning uses a liquid to clean clothes. This shows that consumers lack a basic understanding of the dry and professional wet cleaning processes as well as the process their own cleaner uses.

Results do not show a clear reason for this lack of knowledge. Three potential reasons are offered here. First, many respondents don't use garment cleaning services frequently (only 50% of respondents had used garment cleaning services at least once in the last year, with 22% using garment cleaning services at least once every six months), and consumers aren't motivated to learn about a process that they don't use and doesn't have an apparent direct impact to them. Second, regardless of the frequency of use, garment cleaning may not be something the general public is interested in because the environmental and health concerns of traditional dry cleaning may not be well-known; thus, creating no impetus for consumers to seek out information on their own. Lastly, the lack of information easily available to the public about dry and professional wet cleaning may be a reason for the lack of knowledge. Additional survey questions around interest in dry cleaning and awareness of health and environmental impacts would provide further insight.

Results show multiple ways to target a consumer education campaign to reach the highest number of users of professional wet cleaning and consumers most likely to use a professional wet cleaner.

- Target **metropolitan areas**, as this is where most respondents that have used a professional wet cleaner are located, indicating that wet cleaners are located in metropolitan areas and consumers are able to switch to them.
- Target **those who identify themselves as someone who frequently seeks out environmentally friendly products** as they are most likely to have used a wet cleaner in the past, 75% are likely to use garment cleaners more often if they are environmentally friendly, and they are willing to pay 10% more and travel to a less preferred location for an environmentally friendly cleaner than those who don't seek out environmentally friendly products.
- Target **online articles and friends and/or family** to share and distribute information as these are the most popular methods in which consumers have received wet cleaning information. Social media, including websites like Facebook and YouTube videos, may be a good method to distribute information.
- Target **consumers over the age of 45 who regularly use garment cleaning services**, as they use garment cleaning more frequently than other age groups.

Results show an opportunity for cleaners to increase their business by advertising as environmentally friendly. Cleaners may also convert to professional wet cleaning with the understanding that the conversion may increase their business. Sharing these survey results with cleaners will bring awareness around advertising and willingness of consumers to switch to environmentally friendly cleaners. Advertising as environmentally friendly is a challenge as cleaners must understand they can only

advertise as environmentally friendly if, in fact, they are. Throughout the duration of NYSP2I's work with dry cleaners, many cleaners have advertised themselves using environmental buzzwords, like natural, organic, environmentally friendly, when they are using perc dry cleaning. While challenging, this is an opportunity for NYSP2I to develop an education and outreach campaign for cleaners that may result in a wet cleaner recognition program. It is recommended that NYSP2I and New York state work together to explore development of such a program.

- More than half of respondents say they would use garment cleaning services more if they were advertised as environmentally friendly.
- While 35% of respondents have no preference for the environmentally friendly terminology cleaners use in advertisements, 30% prefer *natural* and 15% prefer *organic*.
- The overwhelming majority of respondents will switch to an environmentally friendly cleaner that charges less or the same or is located in a more preferable or same location as their current cleaner. About half are willing to pay 10% more for a cleaner advertised as environmentally friendly and consumers are more willing to spend 10% more than travel to a less preferred location for an environmentally friendly cleaner.

Next Steps

The results of this survey will be used to develop a consumer education campaign as part of NYSP2I's Professional Wet Cleaning Program. Materials will be developed and distributed to the public and other users of professional garment cleaning services across New York State.

Appendix: Understanding Consumers' Knowledge of Professional Garment Cleaning in NYS Survey

Hello!

Thank you for participating in our survey about Professional Garment Cleaning and \$150 Visa Gift Card sweepstakes. This short survey should take about 5 minutes of your time.

The information you provide will only be used for research purposes. Your personal information will not be released to any third party.

You may only take the survey once and questions marked with an asterisk (*) are required.

No purchase is necessary to be eligible and completing the survey will not affect your chances of being chosen to win the \$150 Visa Gift Card. Please visit the following link for the official rules: http://www.rit.edu/affiliate/nysp2i/sites/rit.edu.affiliate.nysp2i/files/understanding_consumers_knowledge_of_professional_garment_cleaning_survey_official_rules1.pdf

Your participation in this survey is completely voluntary. If you have any questions or concerns please contact Kate Winnebeck at kmhasp@rit.edu or (585) 475-5390.

We really appreciate your input!

1) Please check the box to confirm you have read the rules and agreements:*

I have read the rules and agreements and would like to continue the survey

2) Over the last year, how often did you use professional garment cleaning services?*

- At least once a week
 About once per month
 About 1-2 times every 6 months
 About 1-2 times per year
 Never

3) I seek out environmentally friendly products or services*

Never Rarely Sometimes Often Always

4) How knowledgeable are you about the dry cleaning process?*

- Not at all knowledgeable
 Somewhat knowledgeable
 Expertly knowledgeable

Page exit logic: Page Logic **IF:** Question "Which of the following garment cleaning solvents have you heard of? (Check all that apply)" #5 is not one of the following answers ("Professional wet cleaning")

THEN: Jump to [page 6 - Why Consumers Choose the Cleaners They Do](#)

5) Which of the following garment cleaning solvents have you heard of? (Check all that apply)*

Perchloroethylene (Perc)

- Glycol ether
- Liquid carbon dioxide
- Professional wet cleaning
- Siloxane D5
- GreenEarth
- Hydrocarbon
- Mineral spirits
- Stoddard solvent
- None of the above

Logic: Hidden unless: Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("At least once a week", "About once per month", "About 1-2 times every 6 months", "About 1-2 times per year")

6) Which of the following garment cleaning solvents does your cleaner use? (Check all that apply)*

- Perchloroethylene (Perc)
- Glycol ether
- Liquid carbon dioxide
- Professional wet cleaning
- Siloxane D5
- GreenEarth
- Hydrocarbon
- Mineral spirits
- Stoddard solvent
- Unsure

Logic: Hidden unless: (Question "Which of the following garment cleaning solvents does your cleaner use? (Check all that apply)" #6 is one of the following answers ("Perchloroethylene (Perc)", "Glycol ether", "Liquid carbon dioxide", "Professional wet cleaning", "Siloxane D5", "GreenEarth", "Hydrocarbon", "Mineral spirits", "Stoddard solvent") AND Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("At least once a week", "About once per month", "About 1-2 times every 6 months", "About 1-2 times per year"))

7) I know how my clothes are cleaned by my cleaner:

- True
- False

Validation: Max character count = 2000

Logic: Hidden unless: Question "Which of the following garment cleaning solvents does your cleaner use? (Check all that apply)" #6 is one of the following answers ("Professional wet cleaning")

8) You said your cleaner uses Professional Wet Cleaning, did you;

- Choose this cleaner specifically because they do wet cleaning
- Choose this cleaner for other reasons (ie. location, cost, or reliability)

Validation: Max character count = 2000

Logic: Hidden unless: (Question "Which of the following garment cleaning solvents does your cleaner use? (Check all that apply)" #6 is one of the following answers ("Professional wet cleaning") AND Question "I know how my clothes are cleaned by my cleaner:" #7 is one of the following answers ("True"))

9) Do you know if your cleaner uses Professional Wet Cleaning on your clothes?*

- Yes they do.
- No they do not.
- I'm not sure.

Page exit logic: Page LogicIF: Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("Never") THEN: Jump to [page 8 - Why Consumers Choose the Cleaners They Do](#)

Validation: Max character count = 2000

Logic: Hidden unless: Question "Which of the following garment cleaning solvents have you heard of? (Check all that apply)" #5 is one of the following answers ("Professional wet cleaning")

10) Please describe briefly what you know about professional wet cleaning:

11) Fill in the blank. Dry cleaning uses a _____ to clean clothes.*

- Solid
- Liquid
- Gas
- Unsure

12) Fill in the blank. Professional Wet cleaning uses a _____ to clean clothes.*

- Solid
- Liquid
- Gas
- Unsure

Logic: Hidden unless: Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("At least once a week", "About once per month", "About 1-2 times every 6 months", "About 1-2 times per year")

13) Please rank the following in order of importance when you are choosing on a garment cleaner:

- _____ Environmental Impact
- _____ Location
- _____ Operating Hours
- _____ Past Experiences
- _____ Price
- _____ Reviews
- _____ Turn around time (Such as same day service)

Logic: Hidden unless: Question "Which of the following garment cleaning solvents have you heard of? (Check all that apply)" #5 is one of the following answers ("Professional wet cleaning")

14) Have you ever used a cleaner (currently or previously) who used Professional Wet Cleaning (PWC)?*

- Yes
- No
- Unsure

Logic: Hidden unless: Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("At least once a week", "About once per month", "About 1-2 times every 6 months", "About 1-2 times per year")

15) Which of the following professional garment cleaners would you be more likely to use to clean your clothes?

- An Organic Dry Cleaner
- A Natural Dry Cleaner
- A Dry Cleaner
- A Professional Wet Cleaner
- No Preference

16) Would you use professional garment cleaning services more if they were advertised as environmentally friendly?

- Definitely Not
- Probably Not
- Unsure
- Most Likely
- Definitely

17) Do you believe water can safely be used to clean "Dry Clean Only" garments and fabrics:*

- Yes
- No
- Unsure

Logic: Hidden unless: Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("At least once a week", "About once per month", "About 1-2 times every 6 months", "About 1-2 times per year")

18) Please read the following scenarios and decide how they affect the cleaner you use:*

	Switch Cleaner	Keep Current Cleaner
All other factors remaining constant, you find a more environmentally friendly cleaner who charges 10% less than your current cleaner	<input type="checkbox"/>	<input type="checkbox"/>
All other factors remaining constant, you find a more environmentally friendly cleaner who charges the same price as your current cleaner	<input type="checkbox"/>	<input type="checkbox"/>
All other factors remaining constant, you find a more environmentally friendly cleaner who charges 10% more than your current cleaner	<input type="checkbox"/>	<input type="checkbox"/>

Logic: Hidden unless: Question "Over the last year, how often did you use professional garment cleaning services?" #2 is one of the following answers ("At least once a week", "About once per month", "About 1-2 times every 6 months", "About 1-2 times per year")

19) Please read the following scenarios and decide how they affect the cleaner you use:*

	Switch Cleaner	Keep Current Cleaner
All other factors remaining constant, you find a more environmentally friendly cleaner who is in a more preferred location than your current cleaner	<input type="checkbox"/>	<input type="checkbox"/>
All other factors remaining constant, you find a more environmentally friendly cleaner who is in about the same location as your current cleaner	<input type="checkbox"/>	<input type="checkbox"/>

All other factors remaining constant, you find a more environmentally friendly cleaner who is in a less preferred location than your current cleaner	()	()
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Logic: Hidden unless: Question "Which of the following garment cleaning solvents have you heard of? (Check all that apply)" #5 is one of the following answers ("Professional wet cleaning")

20) Where have you heard or learned about Professional Wet Cleaning? (Check all that Apply)

- My cleaner
- Online Article
- Fliers, brochures or posters
- Friends and/or family
- I don't know anything about Professional Wet Cleaning
- Other: _____

Demographics

Validation: Must be numeric Whole numbers only Positive numbers only

21) What is your zip code?* _____

22) What is your gender?

- Male
- Female
- Prefer not to answer

23) What is your age?

- Under 18
- 18-29
- 30-44
- 45-59
- 60+
- Prefer not to answer

Contact Information

24) Please provide us with the following contact information so that you may be informed if you have won the sweepstakes!

First Name*: _____

Middle Initial: _____

Last Name*: _____

Street Address*: _____

Apt/Suite/Office: _____

City: _____

State: _____

Zip: _____

Country: _____

Phone Number*: _____

E-mail Address (Optional): _____

Thank You!