

# CAA Towing Study April 2020



# Methodology

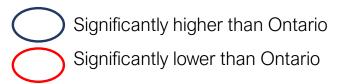
### CAA Towing Study April 2020

This study was conducted between April 21st to 24th, 2020, among a sample of 5,003 Ontario drivers license (G, G2 or G1) holders and part of Maru/Blue's research panel. The study was conducted through online surveys. A probabilistic sample of a similar size would have a margin of error of plus or minus 1.4%, 19 times out of 20.

### Where and how is the study conducted?

The study included respondents from an online panel of Ontarians 18 years or older. The sample is weighted to regional, age and gender demographics, as per Statistics Canada.

### Stats Testing:

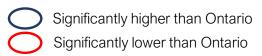




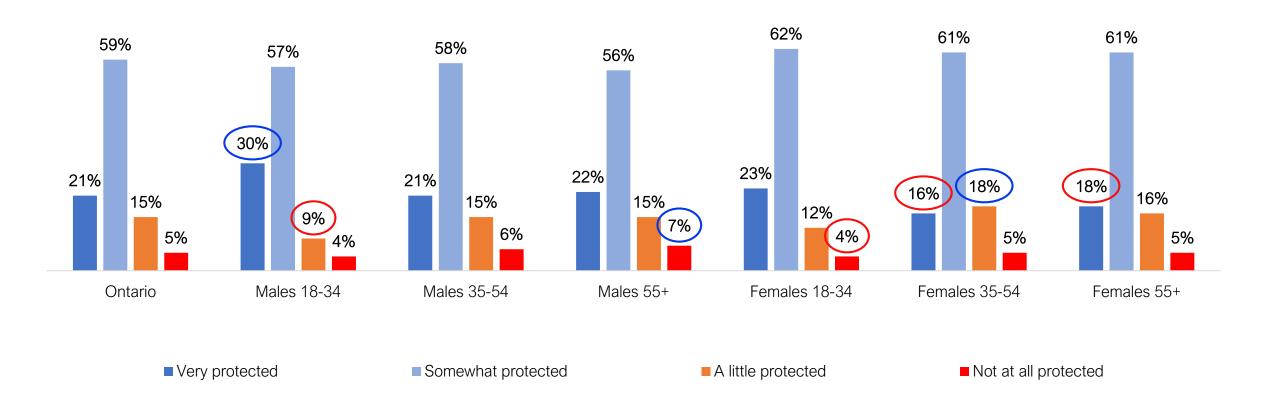
# Potential fears and consumer protection



## Feel protected as a motorist - Age and Gender



Only 1 out of 5 Ontarians feel "very protected" under the current rules and regulations as a motorist. Males 18 – 34 are more likely to feel "very protected", whereas females over 35 years old are less likely to feel "very protected".

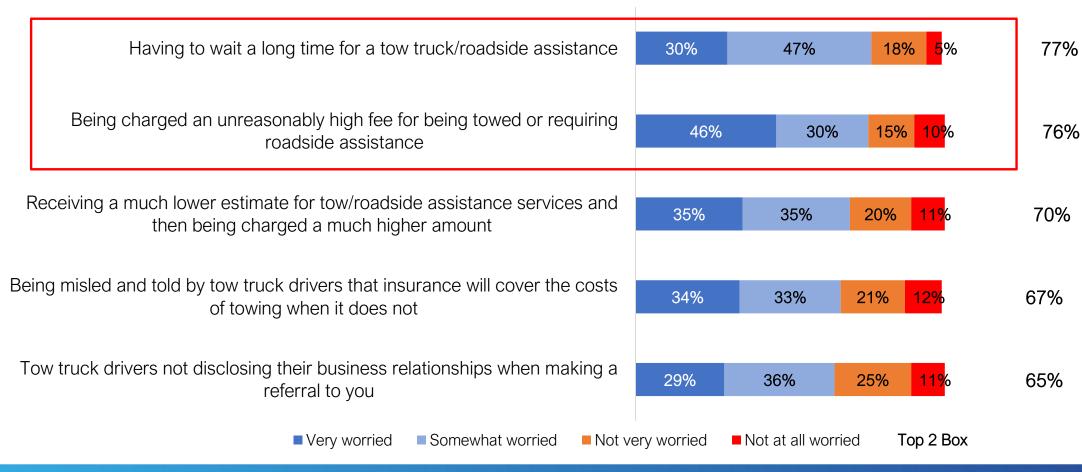




Question - How protected do you feel under the current rules and regulations as a motorist? n = 5003

### Top 5 feared outcomes from tow/roadside assistance experience

Wait time, costs related to tow, and lack of full disclosure are the major concerns for the residents of Ontario from tow/roadside assistance experience.

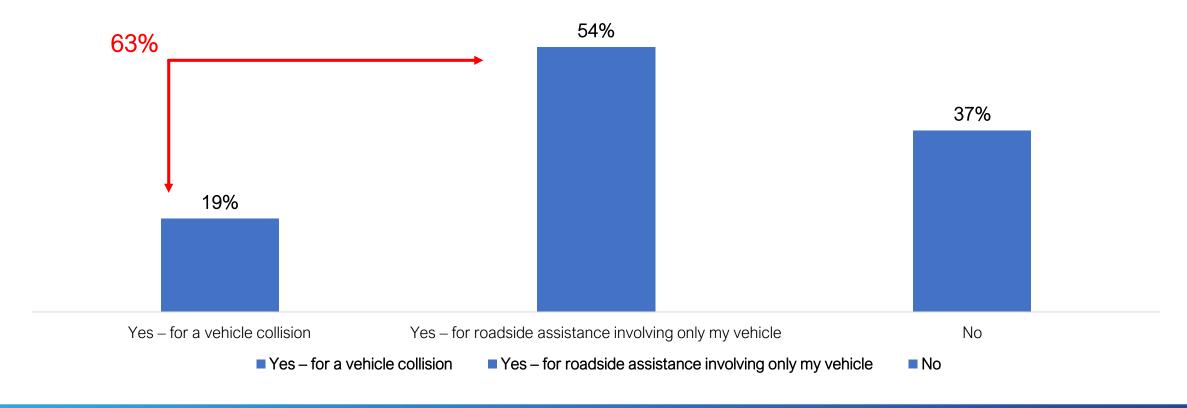




Question - Assuming that you had to call a tow truck/roadside assistance in this situation, which of the following potential outcomes would you be fearful of happening in this type of situation? n = 5003

### Requested towing/roadside assistance – Multiselect Trend Analysis

Nearly two-thirds (63%) of Ontarians have requested towing/roadside assistance in the year 2020, whereas almost 1 out of 5 has requested towing/roadside assistance for vehicle collision purpose.





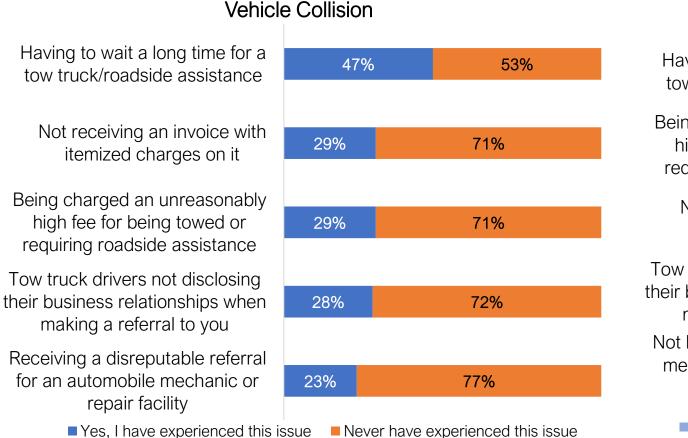
Question - Have you ever requested towing/roadside assistance services in Ontario? Select all that apply. n = 5003

# Towing/roadside experience for collision or other assistance involving own vehicle

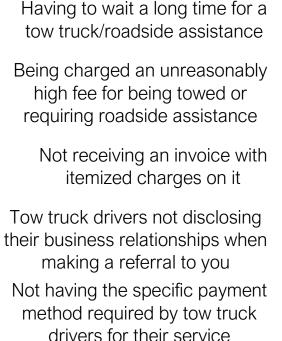


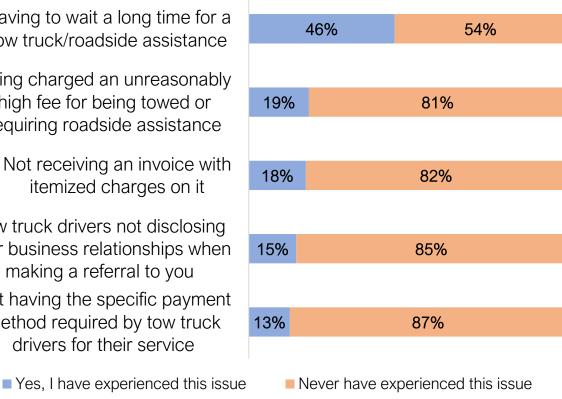
### Top 5 experiences in the past from a tow truck

Wait time, costs related to tow, and lack of full disclosure have been experienced by the residents of Ontario from their tow/roadside assistance.



### Other Roadside assistance







Question - And have you ever experienced any of the following issues in the past from a tow truck or roadside assistance provider? n = 3179

### Tother experiences in the past from a tow truck

Vehicle Collision

#### Being misled and told by tow 21% 79% truck drivers that insurance will... Receiving a much lower estimate 20% 80% for tow/roadside assistance... Having your vehicle 19% 81% towed/impounded/worked on... Not having the specific payment 19% 81% method required by tow truck... Being towed to a different 18% 82% location than the one you... Being harassed/assaulted (in any 16% 84% way) by a tow truck... Being forced to pay with cash 15% 85% (e.g., taken to a bank machine... Forced to sign a blank 13% 87% work/service order Yes, I have experienced this issue ■ Never have experienced this issue

#### Other Roadside assistance

Being misled and told by tow truck drivers that insurance will cover the	12% 88%
Receiving a much lower estimate for tow/roadside assistance services	12% 88%
Receiving a disreputable referral for an automobile mechanic or repair	12% 88%
Being forced to pay with cash (e.g., taken to a bank machine to retrieve	11% 89%
Having your vehicle towed/impounded/worked on	10% 90%
Being towed to a different location than the one you specified to the	10% 90%
Being harassed/assaulted (in any way) by a tow truck driver/roadside	9% 91%
Forced to sign a blank work/service	6 <mark>%</mark> 94%
■ Yes, I have experienced this issue	Never have experienced this issue

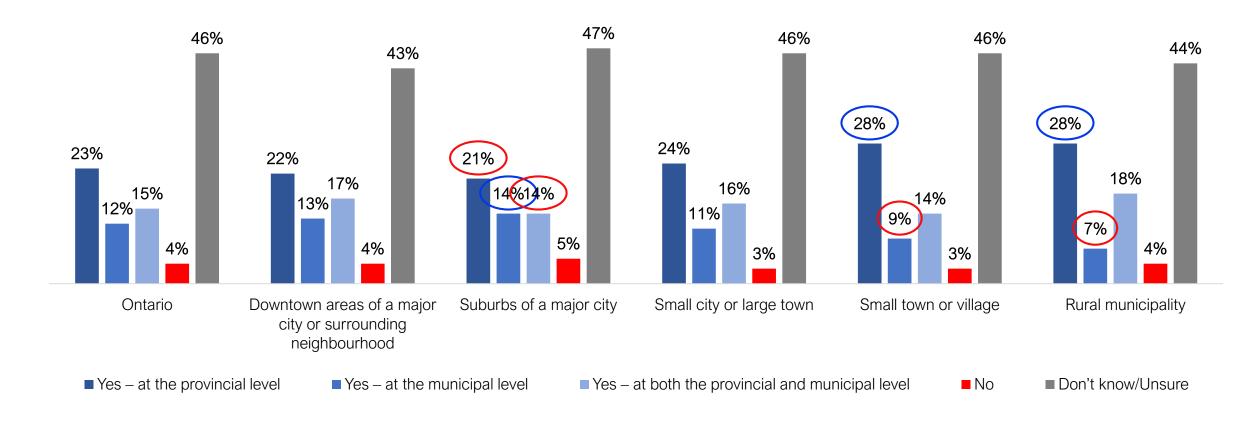


Question - And have you ever experienced any of the following issues in the past from a tow truck or roadside assistance provider? n = 3179

# Level of support for regulating the towing industry



# Tow trucks in Ontario licensed - Area of Residence Half (50%) of Ontarians believe that the tow trucks in Ontario are licensed. This is not the case.

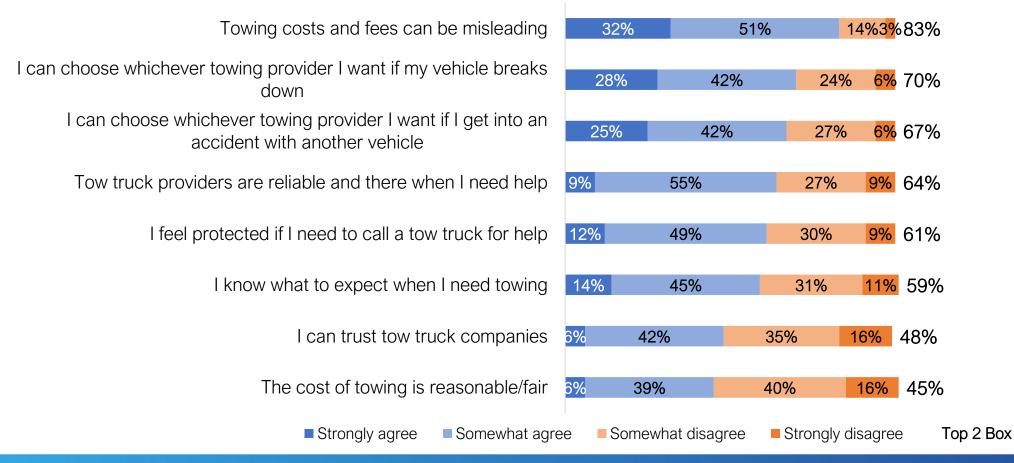




Question - To the best of your knowledge, are tow trucks in Ontario licensed? n = 5003

### Agreement with the following statements

More than 4 out of 5 respondents "strongly/somewhat agree" that towing costs and fees can be misleading.

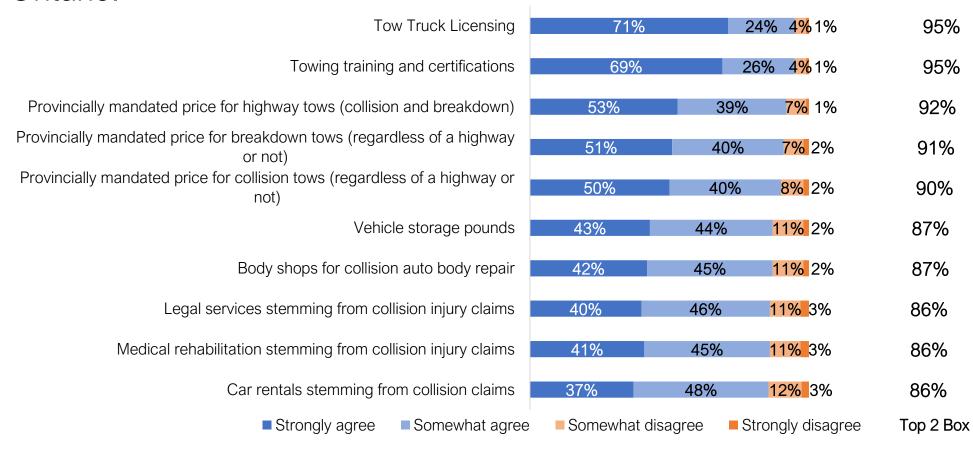




Question - How much do you agree or disagree with the following statements? n = 5003

### Agreement with following regulation

More than 90% of the Ontarians "strongly/somewhat agree" with regulations such as tow truck licensing, certification and provincial regulations for towing industry in Ontario.

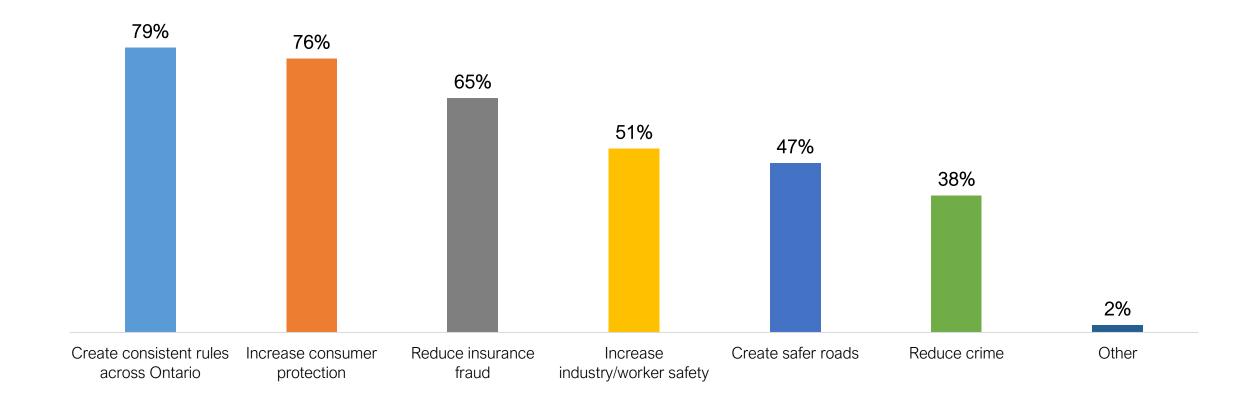




Question - Please indicate your agreement with regulating the following components of the towing industry in Ontario. n = 5003

### Toutcome of rules and regulation – Multiselect

More than three quarters of Ontarians believe that regulations would "create consistent rules across Ontario" and "increase consumer protection".

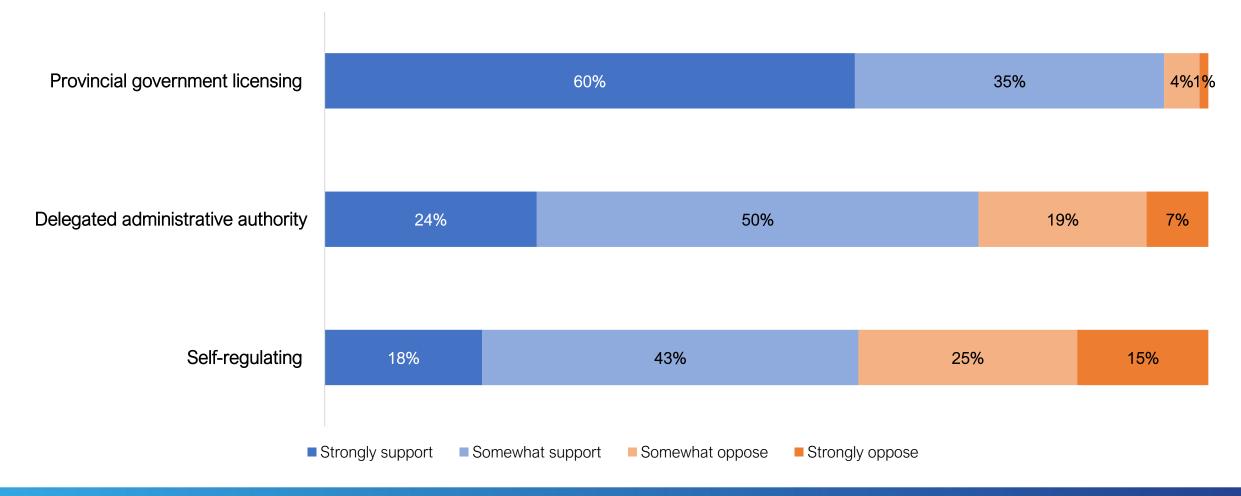




Question - If the Ontario government were to put rules and regulations (including training and licensing) in place that are the same across every municipality/all of Ontario, do you feel it could have any of the following outcomes? Select all that apply. n =

### Level of support for the following regulation model

Among Ontarians, "provincial government licensing" received maximum support as the model of regulation for towing industry.

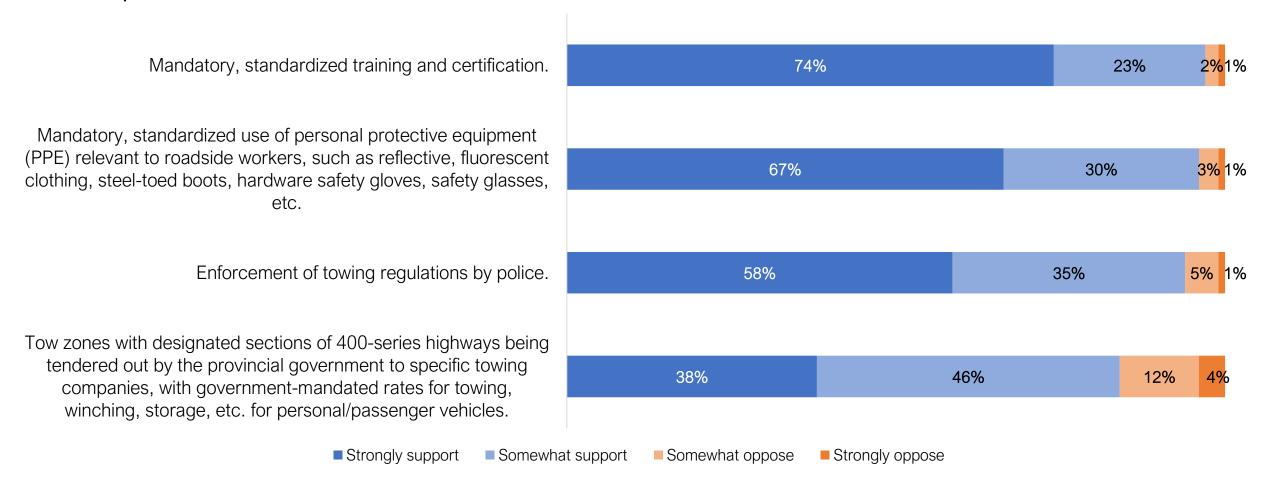




Question - What is your level of support for each of the following models of regulation for the towing industry in Ontario? n = 5003

### The Level of support for the following aspects of regulation

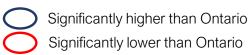
Mandatory, standardized training and certification was "strongly supported" by almost three quarters of Ontarians.



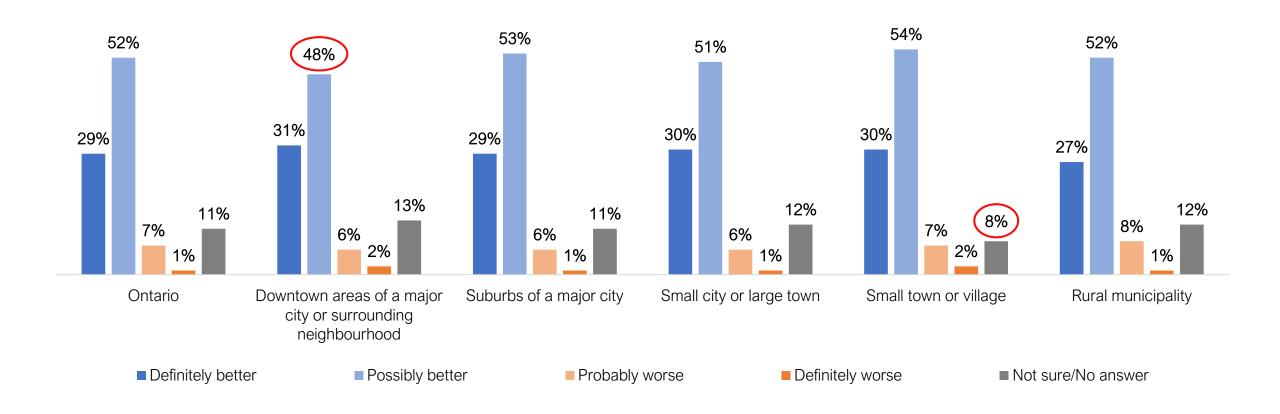


Question - What is your level of support for each of the following aspects of regulation for the towing industry in Ontario? n = 5003

## Province getting involved directly - Area of Residence



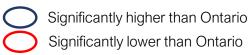
4 out of 5 respondents feel that the involvement of the province in the tow industry would "definitely/possibly better" the industry.



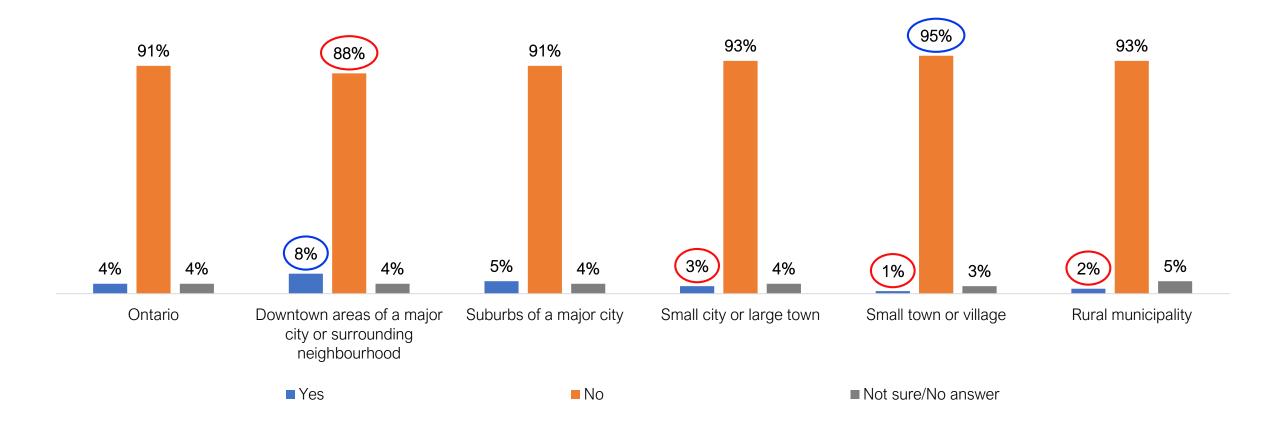


Question - Do you think if the province gets directly involved in the tow industry that it will make things better or worse? n = 5003

## Triving without tow truck driver education/training - Area of Residence



An overwhelming majority (91%) of the respondents oppose the idea of anyone driving a tow truck without specific tow truck driver education/training.





Question - Do you think anyone should be able to drive a tow truck without specific tow truck driver education/training? n = 5003

### Takeaways & Executive Summary

### Consumer Protection

- Only 1 out of 5 Ontarians feel "very protected" under the current rules and regulations as a motorist.
- Wait time, costs related to tow, and full disclosure are the major concerns for the residents of Ontario.

### Ontario drivers' awareness and comprehension of the Towing Bill of Rights

- Only 1 out of 5 Ontarians are aware about CAA's towing bill of rights introduced in August 2018.
- More than 4 out of 5 respondents "strongly/somewhat agree" that the towing cost and fees can be misleading.

### Towing/roadside experience for collision or other assistance involving own vehicle

Wait time, costs related to tow, and lack of disclosure have been experienced by the residents of Ontario from their tow/roadside assistance.

### Public's appetite for licensing the towing sector in Ontario

- More than 90% of the Ontarians "strongly/somewhat agree" with regulations such as tow truck licensing, certification and provincial regulation.
- Among Ontarians, "provincial government licensing" received the most support as the model of regulation for towing industry.
- Mandatory, standardized training and certification was "strongly supported" by almost three quarters of Ontarians.

