

# 2016 Car Wash National Consumer Survey

2.21.17



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# Background & Objectives

- Since 1996, the International Carwash Association® (ICA) has conducted large-scale quantitative consumer research to unearth business-building insights for both current and prospective members. The 2016 consumer study is the eighth such study.
- The following are key areas of learning surrounding shifts in consumer attitudes and behavior from 2014 to 2016:
  - Incidence – How has the mix of home vs. professional car washing changed?
  - Value – What do consumers most value in car wash services?
  - Barriers – Why do consumers not wash (or wash more often) at a professional car wash?
  - Differentiation – What factors influence consumer preference for one professional car wash over another?

# Background & Objectives

- Key ICA members were asked to review the 2014 questionnaire and offered their suggestions for additional questions and areas of learning.
- The following includes new areas of learning that the 2016 consumer study addresses:
  - Retail Experience – How do specific aspects of the car wash influence consumer preference? How does the overall car wash experience compare to other retail experiences?
  - Loyalty Programs – Why would consumers join a loyalty program? How are consumers currently utilizing loyalty programs?
  - High-Tech Safety Vehicles – What are the concerns consumers have with washing their technology-equipped vehicles at PRO car washes?
  - Online Media Consumption – Where do consumers prefer to receive online communications or offers? How often do they prefer to receive communications or offers from specific channels?

# Study Design

- Blue Chip Marketing Worldwide conducted a national online study in the United States from October 12-16, 2016.
- 1606 adults were surveyed (In order to qualify for the study, respondents had to be 18 years or older and had to own or lease a vehicle.)
- The total sample is weighted to be representative of the U.S. Census for gender, age, race/ethnicity, household income, region of country.

## Notes to the Reader: Interpretation of Data

- *Percentages* are derived by dividing the number of responses per category by the total number of responses to the survey.
- *Top-Two Box Net*, or the percentage of respondents rating the aspect of a survey question a "4" or "5" (the top-two options) is shown for questions where respondents were asked to use a rating scale of 1 to 5, with "5" being the highest score and "1" being the lowest score.
- *Statistically significant differences* between columns are noted in **RED CAPITAL LETTERS**, calculated at the 95% confidence level. Directional differences are noted in **red lower case letters**, calculated at the 90% confidence level.
- Due to rounding, not all columns will add up to 100% totals.
- Finally, some questions allowed respondents to choose more than one answer. Therefore, these percentages will not equal 100%.

# Segment Names & Definitions

## PRO

- Used a full-service car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (includes interior cleaning) in the past year
- Used an exterior car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (does not include interior cleaning) in the past year
- Used an automatic car wash where the vehicle is stationary but the machine moves around the vehicle in the past year
- Used a car wash where employees clean the vehicle by hand in the past year
- Used a self-service car wash (do-it-yourself with a spray wand) in the past year

## DIY

- Washed vehicle at home in the past year

## NON

- Have not washed vehicle in the past year

# PRO Car Wash: Sub-Segment Names & Definitions

## Full

- Used a full-service car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (includes interior cleaning)

## Exterior

- Used an exterior car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (does not include interior cleaning)

## Stationary

- Used an automatic car wash where the vehicle is stationary but the machine moves around the vehicle

## Hand

- Used a car wash where employees clean the vehicle by hand

## Self

- Used a self-service car wash (do-it-yourself with a spray wand)



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## Executive Summary

# Executive Summary: Incidence, Value, Barriers & Differentiation

## Incidence

How has the mix of home vs. professional car washing changed from 2014 to 2016?

- Those who washed at a professional car wash in the past year increased slightly, from 79% in 2014 to 80% in 2016.
- At the same time, those who wash both at home and at a PRO wash increased significantly from 31% in 2014 to 40% in 2016.
- Among respondents who washed exclusively at a PRO wash, medium PRO users increased significantly to 56% (up 9% from 2014).

## Value

What do consumers most value in car wash services?

- The importance of ALL additional car wash services significantly increased 2014 to 2016.
- Having the wheels and rims cleaned is the most important additional car wash service.
- Despite significant, positive increases in the perceived value of additional car wash services, there is still a significant gap between their importance and willingness to pay more for those services.

## Barriers

Why do consumers not wash (or wash more often) at a professional car wash?

- Cost is still the single biggest reason for washing a vehicle at home instead of using a PRO wash with 90% agreement among DIY washers, up from 81% in 2014.
- DIY washers feel that they receive the same emotional benefits when they wash their car at home. They are significantly more likely than in 2014 to wash their car at home for the emotional benefits (I enjoy washing my vehicle, it is fun to wash my car, etc.).

## Differentiation

What factors influence consumer preference for one professional car wash over another?

- Convenience overwhelmingly continues to be the most important reason to choose a particular car wash.



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## Key Insights & Opportunities

# Insights & Opportunities

The vast majority of Americans wash their vehicles, but how they choose to wash their vehicles has shifted.

- In 2016, 96% washed at least once, up from 95% in 2014.
- While the majority of Americans (80%) washed their vehicle(s) at a PRO wash in the past year, there has been a significant increase in those who also washed their vehicles at home.
- The increase in both PRO and DIY washing is driven in large part by a significant increase in washing among owners of newer cars.

# Insights & Opportunities

Changes in washing behavior are fueled by dramatic changes in our economy.

- The economy has rebounded since the 2008 recession as evidenced by lower unemployment, more discretionary income, and greater consumer confidence.
- Car sales reached a high in 2016 of 18 million in sales, up from a low of around 9 million in 2009.
- These new vehicle owners are washing their vehicles significantly more often at a PRO wash than owners of older vehicles.
- ***How can we motivate new vehicle owners to keep washing regularly (e.g., keep your new car looking clean and new)?***

A dramatic increase in the use of frequent wash programs is a key contributor to the increased frequency of using a PRO wash.

- The number of frequent washer members nearly doubled from 12% in 2014 to 21% in 2016.
- ***If a frequent wash program is not a current service offering, can/should it be?***

# Insights & Opportunities

The increased frequency with which Americans are washing their vehicles is driven by their attitudes about the necessity and importance of washing.

- Americans believe that washing your vehicle is an essential part of car maintenance.
- 64% of consumers believe that washing your vehicle is an important and necessary part of car maintenance. This is a significant, positive increase from 2014 (53%).
- ***With increased belief in the importance of washing, how can we reinforce the importance of frequent/regular washing?***

Consumers' positive perceptions of car washes have grown significantly over the past two years.

- Consumers agree significantly more than they did in 2014 that washing your vehicle at a car wash is more convenient and enjoyable, a better overall quality wash and value, safer for the environment and the car, and costs less than washing a car at home.
- ***How can we build on this growth in positive sentiment among consumers?***

# Insights & Opportunities

Consumers strongly believe in the benefits of a PRO wash, but they don't necessarily love the experience.

- Car washes rank 5th out of 10 of best consumer experiences.
- Grocery stores and sit-down restaurants earn the top spots when it comes to providing experiences that consumers find the most favorable.
- ***How can we create an experience at a PRO wash that not only matches, but exceeds the feeling consumers have when their car is clean?***

Consumer expectations are rising.

- Across cleanliness, price, convenience, dryness, and speed, respondents ranked these as significantly more important aspects of a car wash than in 2014.
- All additional services increased in importance from 2014 which is reflective of consumers' rising expectations. However, there is still a significant gap between the importance of these services and whether consumers would pay more for them.
- ***How can we close the gap between desire for added services and willingness to pay for them?***

# Insights & Opportunities

Being cognizant of your environmental impact is important to consumers.

- Consumers are increasingly taking steps to decrease their environmental impact and expect car washes to do the same. 66% agree that a car wash that cares about the environment is important to them.
- We have seen success in promoting the industry's environmentally friendly practices through programs such as the ICA WaterSavers program.
- ***How can we further engage and appeal to consumers through communicating environmentally friendly practices?***

A big opportunity remains to leverage digital outreach.

- Only 11% of all respondents received an offer from a car wash in the past year. While this is a significant increase from 2014 (7%), there is a huge opportunity to increase reach and awareness through digital outreach.
- While email is still the primary channel for receiving and redeeming offers, it has decreased significantly in use from 2014. Other channels have slowly gained ground such as Facebook and Twitter.
- ***How can we leverage digital media and social platforms to reach consumers?***

# Insights & Opportunities

Unlimited wash programs open the door for greater consumer engagement and profitability.

- Frequent wash members are significantly more satisfied with the value they receive at a car wash than non-member PRO washers. Not only are frequent wash members more satisfied customers, they are more profitable as well.
- Less than half of members (46%) of unlimited wash programs say they wash their vehicle more than once a month. This means more than half of members are not maximizing the value of their membership resulting in greater profitability for car washes.
- There is a specific consumer profile that is most receptive to the unlimited wash program offering.
- ***How can we most effectively and efficiently reach those most interested in frequent washing to increase membership in unlimited wash programs?***



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## Key Findings: 2016

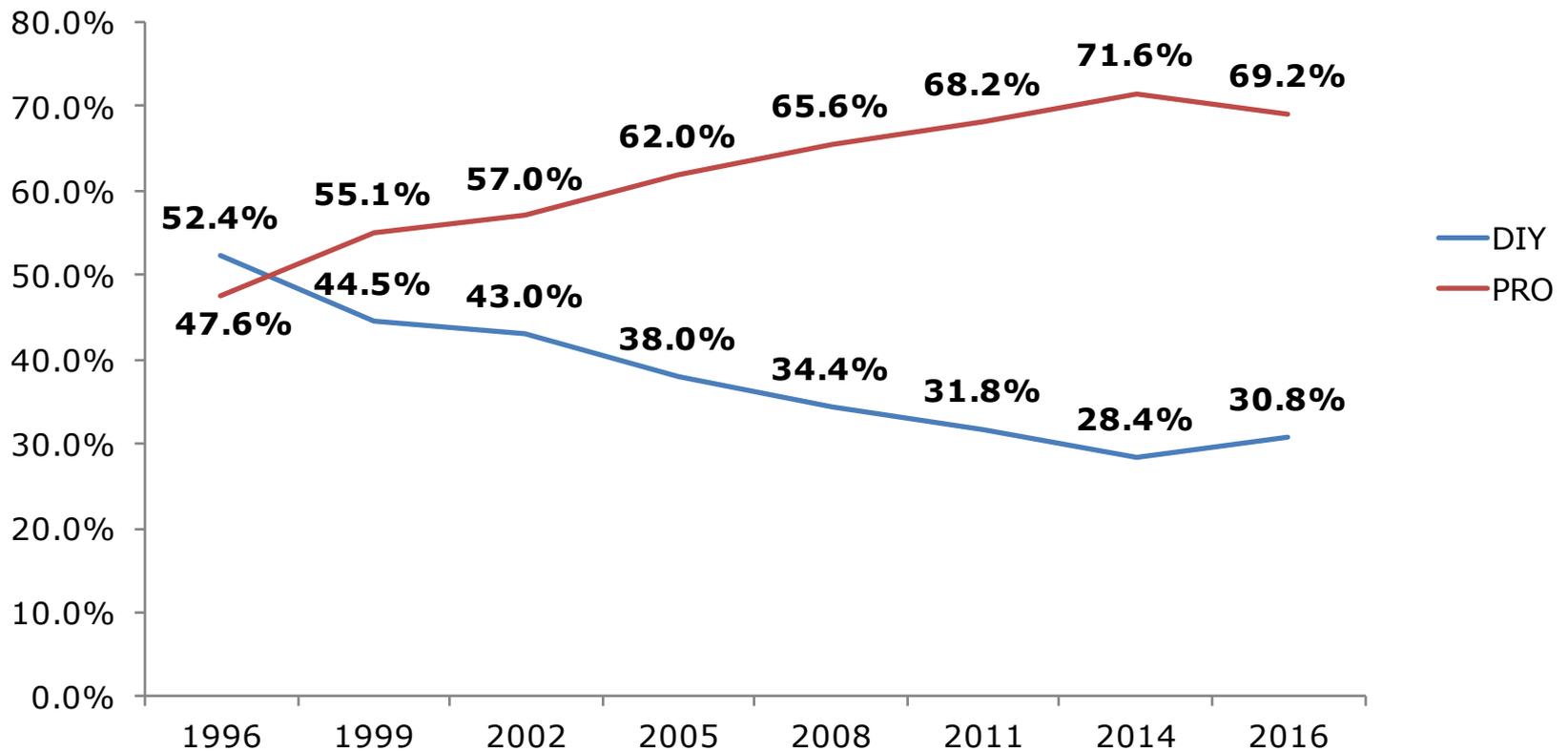
Nearly every American washes their vehicle. While the difference is not significant, even more washed in 2016.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Washed</b>	95%	96%
<b>Did Not Wash</b>	5%	4%

The vast majority of Americans (80%) washed their vehicle at a PRO wash at least once in 2016. While the difference is not significant, even more washed at a PRO wash in 2016. At the same time, there has been a significant increase in those who DIY (washed their vehicle at home), from 46% to 54%.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>PRO</b>	79%	80%
<b>DIY</b>	46%	54% <b>A</b>

While not a statistically significant decrease, the percentage of Americans who washed their vehicle at a PRO wash most often (69.2%) declined in the past year. This marks the first decline since the start of the ICA Consumer Study in 1996. Conversely, 'DIY most often' (washed vehicle at home most often) increased for the first time since the start of the Study.



Q: Which ONE of the following do you do most often to wash your vehicle? Source: International Car Wash Association Study of Consumer Car Washing Attitudes and Habits, 1996– 2016.

The increase in DIY is driven by a significant increase in those who are “switching” (PRO+DIY at least once in the past year). However, the number of Americans who only wash their vehicles at home has declined slightly (not significant).

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N= 1594	N= 1534
<b>PRO Only</b>	52% B	44%
<b>PRO + DIY</b>	31%	40% A
<b>DIY Only</b>	17%	16%

While we've seen an increase in the incidence of home washing, it isn't as routine as it was just two years ago. In 2016, only 22% of home washers were frequent home washers (a few times a month or more often), versus 29% in 2014.

<b>On average, how often do you wash your vehicle at home?</b>	<b>2014 DIY A</b>	<b>2016 DIY B</b>
<b>Total</b>	N=766	N=867
<b>Once a year</b>	8%	6%
<b>Every six months or so</b>	24% <b>B</b>	18%
<b>Every couple of months / Once a month</b>	39%	53% <b>A</b>
<b>A few times a month</b>	23% <b>B</b>	18%
<b>Once a week or more often</b>	6% <b>b</b>	4%

Concurrently, PRO washers are washing significantly more often at PRO washes compared to two years ago.

<b>On average, how often do you wash your vehicle at a car wash?</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>Once a year</b>	5%	4%
<b>Every six months or so</b>	20% <b>B</b>	12%
<b>Every couple of months / Once a month</b>	47%	<b>58% A</b>
<b>A few times a month</b>	24% <b>b</b>	21%
<b>Once a week or more often</b>	4%	<b>6% A</b>

These changes in washing behavior are fueled by dramatic changes in our economy.

The economy has rebounded since the Great Recession, evidenced by a significant decline in unemployment.

US UNEMPLOYMENT RATE



SOURCE: WWW.TRADINGECONOMICS.COM | U.S. BUREAU OF LABOR STATISTICS

Economic improvement is accompanied by a significant improvement in consumer confidence.

### US CONSUMER SENTIMENT



SOURCE: WWW.TRADINGECONOMICS.COM | UNIVERSITY OF MICHIGAN

The improved economy has buoyed new car sales to the strongest numbers since the onset of the Great Recession.



This increase in new car sales is highlighted in our 2016 vs. 2014 data.

<b>How old is the vehicle (car, van, truck or SUV) you drive most often?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>0-3 years' old</b>	28%	35% <b>A</b>
<b>4-9 years' old</b>	39% <b>B</b>	34%
<b>More than 10 years' old</b>	33%	32%

These new vehicle owners washed their vehicles significantly more often at a PRO wash than owners of older vehicles.

<b>Age of Vehicle vs. PRO Wash Frequency</b>	<b>0-3 yrs old A</b>	<b>4-9 yrs old B</b>	<b>More than 10 yrs old C</b>
<b>Total</b>	N=469	N=461	N=351
<b>Once a year</b>	3%	5%	5%
<b>Every six months or so</b>	9%	13% A	14% A
<b>Every couple of months</b>	27%	30%	40% AB
<b>Once a month</b>	29% bC	24%	22%
<b>A few times a month</b>	24% C	23% C	14%
<b>Once a week or more often</b>	8% bC	5%	4%

A dramatic increase in the use of frequent wash programs is a key contributor to the increased frequency of using a PRO wash.

How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes	2014 PRO A	2016 PRO B
<b>Total</b>	N=1319	N=1281
<b>I'm a member of a frequent washer club</b>	11%	21% <b>A</b>

The increase in PRO wash frequency is fueled by a sea-change in attitudes about washing.

The increased frequency with which Americans are washing their vehicles is driven by their changing attitudes. In 2016, significantly more Americans agree that washing your vehicle is important and necessary.

<b>Which statement do you most agree with?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	53%	64% <b>B</b>
<b>Washing a vehicle is a discretionary purchase, but something that I like to have done</b>	26% <b>A</b>	22%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	21% <b>A</b>	14%

PRO washers are significantly more likely to agree with the emotional benefits of using a PRO wash.

<b>How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>A clean vehicle makes me feel good</b>	75%	87% A
<b>I want the vehicle to look good for special occasions</b>	73%	74%
<b>A clean vehicle is a good reflection on me</b>	69%	77% A
<b>It's a treat to have my vehicle washed</b>	59%	68% A
<b>When the weather is nice, I enjoy getting a car wash</b>	58%	60%
<b>I don't enjoy doing it myself</b>	46%	50% A
<b>It's a fun family activity</b>	15%	32% A

PRO washers are also significantly more likely to agree with the rational benefits of using a PRO wash.

<b>How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>Washing helps protect the value of my vehicle</b>	72%	80% A
<b>I want to prevent my vehicle from rusting</b>	67%	77% A
<b>It saves time</b>	65%	75% A
<b>It's part of my car maintenance routine</b>	55%	69% A
<b>A car wash does a better job than I can do myself</b>	48%	62% A
<b>I have a coupon or other price discount</b>	41%	42%
<b>It's convenient to wash my vehicle while I am doing something else, like buying gas</b>	39%	58% A
<b>It is safer for the environment than washing at home</b>	26%	42% A
<b>It costs less money than washing the vehicle myself</b>	18%	32% A

Q: How much do you agree or disagree with each of the following statements? I use a car wash because: (5 point scale; Agree strongly/Agree somewhat).

There are also significant increases in the benefits of washing at a PRO wash over washing at home.

Please indicate whether you agree or disagree with each of the following statements. Top 2 Boxes	2014 A	2016 B
<b>Total</b>	N=1675	N=1606
<b>Washing a car at a car wash is <u>less work</u> than washing a car at home</b>	89%	89%
<b>Washing a car at a car wash is <u>faster</u> than washing a car at home</b>	85%	86%
<b>Washing a car at a car wash is <u>more convenient</u> than washing a car at home</b>	75%	78% A
<b>Washing a car at a car wash is <u>more enjoyable</u> than washing a car at home</b>	61%	69% A
<b>Washing a car at a car wash <u>provides a better overall quality of wash</u> than washing a car at home</b>	46%	60% A
<b>Washing a car at a car wash is <u>safer for the environment</u> than washing a car at home</b>	40%	55% A
<b>Washing a car at a car wash is a <u>better overall value</u> than washing a car at home</b>	36%	51% A
<b>Washing a car at a car wash is <u>safer for the car</u> than washing a car at home</b>	23%	37% A
<b>Washing a car at a car wash <u>costs less</u> than washing a car at home</b>	22%	34% A

While consumers strongly believe in the benefits of using a PRO wash, they don't necessarily love the experience relative to other retail businesses. Car washes rank 5<sup>th</sup> while grocery stores (66%) and sit-down restaurants (58%) earn the top spots as the most favorable experiences.

Please rank the following businesses based on your overall experience as a consumer. Top 3 Boxes (1-3)	2016 PRO
<b>My Favorite Grocery Store</b>	66% (N=1281)
<b>My Favorite Sit-Down Restaurant</b>	58% (N=1279)
<b>My Favorite Mass Retailer</b>	45% (N=1277)
<b>My Favorite Quick-Serve Restaurant</b>	30% (N=1280)
<b>My Favorite Car Wash</b>	25% (N=1278)
<b>My Favorite Gas Station</b>	22% (N=1281)
<b>My Favorite Bank</b>	19% (N=1280)
<b>My Favorite Home Improvement Store</b>	16% (N=1276)
<b>My Favorite Hair Salon or Barber</b>	16% (N=1278)
<b>My Favorite Dry Cleaner</b>	3% (N=1273)

Those who use full-service wash stations most often rated their overall car wash experience as significantly more favorable than other car wash users.

My Favorite Car Wash	Full-Service Most Often A	Exterior Most Often B	Automatic Most Often C	Hand Wash Most Often D	Self-Service Most Often E
<b>Total</b>	N=358	N=251	N=216	N=68	N=166
<b>1 - Best</b>	18% BCdE	9%	10%	9%	8%
<b>2</b>	10% BCE	5%	5%	6%	3%
<b>3</b>	13% BCE	4%	4%	10% BC	7%
<b>4</b>	13%	10%	12%	12%	14%
<b>5</b>	12%	15%	10%	22% ACE	11%
<b>6</b>	9%	12%	16% Ae	10%	10%
<b>7</b>	6%	16% AD	13% AD	3%	16% AD
<b>8</b>	9%	14% A	14% A	19% A	15% A
<b>9</b>	7%	9%	13% A	9%	11% a
<b>10 - Worst</b>	3%	5%	4%	1%	5%

## Consumer expectations are rising when it comes to their local car wash.

How important are each of the following aspects of a car wash to you? Top 2 Boxes	2014 PRO A	2016 PRO B
<b>Total</b>	N=1319	N=1281
<b>Cleanliness (the vehicle is clean, all dirt has been removed)</b>	87%	93% A
<b>Price (it is a good value)</b>	80%	87% A
<b>Shininess (the vehicle is shiny and bright)</b>	67%	76% A
<b>Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)</b>	65%	81% A
<b>Dryness (the vehicle is dry, there is no water or soap remaining)</b>	64%	76% A
<b>Speed (I can get in and out quickly)</b>	57%	75% A
<b>Hours of operation (the car wash is open when I want a wash)</b>	N/A	73%
<b>Human interaction (there is an employee who greets you and personally takes your payment)</b>	N/A	34%
<b>Self-service (a touch screen or pay station takes your payment)</b>	N/A	44%

The increase in the importance of additional services over the last two years is reflective of their rising expectations.

<b>How important are each of the following additional services at a car wash? Top 2 Boxes</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>Having the underbody of the vehicle cleaned</b>	46%	62% A
<b>Having the interior vacuumed for me</b>	43%	49% A
<b>Having a wax or paint protectant applied</b>	43%	59% A
<b>Having the wheels specially cleaned</b>	42%	N/A
<b>Having the vehicle hand towel dried</b>	37%	50% A
<b>Getting my tires dressed or shined</b>	36%	N/A
<b>Being able to vacuum the interior myself</b>	33%	48% A
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	27%	N/A
<b>Having a fragrance added to the interior</b>	19%	35% A
<b>Having the wheels and rims cleaned</b>	N/A	66%
<b>Having the exterior polished</b>	N/A	56%
<b>Having the interior cleaned</b>	N/A	60%
<b>Having the tires shined</b>	N/A	51%

Despite the significant, positive increases in consumer attitudes towards PRO washes, a significant gap still exists between what consumers feel is important and what they are willing to pay more for.

<b>Importance vs. Worth Paying More For (Additional Services)</b>	<b>2016 Importance</b>	<b>2016 Worth Paying More For</b>	<b>Gap</b>
<b>Total</b>	N=1319	N=1281	
<b>Having the wheels and rims cleaned</b>	66%	38%	-28
<b>Being able to vacuum the interior myself</b>	48%	22%	-26
<b>Having the underbody of the vehicle cleaned</b>	62%	42%	-20
<b>Having the vehicle hand towel dried</b>	50%	30%	-20
<b>Having the tires shined</b>	51%	32%	-19
<b>Having a fragrance added to the interior</b>	35%	18%	-17
<b>Having the exterior polished</b>	56%	40%	-16
<b>Having the interior cleaned</b>	60%	44%	-16
<b>Having a wax or paint protectant applied</b>	59%	52%	-7
<b>Having the interior vacuumed for me</b>	49%	46%	-3

Q: How important are each of the following additional services at a car wash? (5 point scale; Extremely important/Very important); Q: Which of the following additional services at a car wash is WORTH PAYING MORE FOR?

Consumers' rising expectations extend into the importance they place on the philosophies and practices of their local car wash.

How important are each of the following to you? Top 2 Boxes	2016 PRO
<b>Total</b>	N=1281
<b>My local car wash is active in the community and supports the community.</b>	33%
<b>My local car wash supports car wash fundraising events for schools, local charities, etc.</b>	36%
<b>My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)</b>	61%

Not only do PRO washers expect their local car wash to be environmentally conscious in their business practices, they too have become more environmentally conscious in the last two years.

<b>Which of the following statements do you agree with?</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>I recycle</b>	81%	83%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	38%	46% <b>A</b>
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	28%	38% <b>A</b>
<b>None of the above</b>	14% <b>B</b>	10%

Finally, marketing has contributed to the growth of PRO washing.

But there's still a long way to go.

While the number of respondents who received any type of online communication from a PRO wash in the past year is still low, significantly more received communications from a PRO wash in 2016 (11%). A big opportunity remains to leverage digital outreach.

<b>Have you received any online communications or offers from a car wash in the past year?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Yes</b>	7%	11% A
<b>No</b>	93% B	89%

There are multiple online platforms that experienced significant growth in the percentage of consumers who received online communications or offers from a car wash in the past year.

Sources of Online Communications from Car Washes in Past Year	2014 Received A	2016 Received B
<b>Total</b>	N=121	N=182
<b>Email</b>	48%	41%
<b>Facebook</b>	25%	39% A
<b>Groupon</b>	15%	18%
<b>Car wash website</b>	12%	34% A
<b>LivingSocial</b>	11%	15%
<b>Banner ad on a website</b>	10%	13%
<b>Coupons.com</b>	10%	19% A
<b>Twitter</b>	7%	25% A
<b>Other coupon app or website</b>	7%	5%
<b>Coupon bloggers</b>	5%	10% a

Q: Still thinking about the past year, how have you received online communications or offers from car washes?; Q: Have you used any coupons or promotional offers from any of the following in the past year?

These platforms also experienced significant growth of consumers who redeemed an online car wash offer they received in the past year. Email experienced a significant decline in the percentage of consumers who redeemed car wash offers they received, while Facebook, Car Wash Websites and Twitter increased significantly.

Sources of Online Communications from Car Washes in Past Year	2014 Received A	2016 Received B	2014 Used C	2016 Used D
<b>Total</b>	N=121	N=182	N=118	N=181
<b>Email</b>	48%	41%	44% D	31%
<b>Facebook</b>	25%	39% A	18%	28% C
<b>Groupon</b>	15%	18%	13%	8%
<b>Car wash website</b>	12%	34% A	10%	25% C
<b>LivingSocial</b>	11%	15%	4%	6%
<b>Banner ad on a website</b>	10%	13%	1%	7% C
<b>Coupons.com</b>	10%	19% A	8%	11%
<b>Twitter</b>	7%	25% A	3%	17% C
<b>Other coupon app or website</b>	7%	5%	2%	2%
<b>Coupon bloggers</b>	5%	10% a	4%	5%

Q: Still thinking about the past year, how have you received online communications or offers from car washes?; Q: Have you used any coupons or promotional offers from any of the following in the past year?



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## Key Findings: Unlimited Wash Programs

Unlimited wash programs open the door for deeper consumer engagement.

Members of unlimited wash programs redeemed significantly more car wash offers from a number of different sources than non-member PRO washers.

Have you used any car wash coupons or promotional offers from any of the following in the past year?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
Received an offer from a car wash in past year	N=61	N=109
Facebook	57% B	14%
Twitter	38% B	6%
Search Engine (Google/Yahoo/Bing)	25% B	12%
Car wash website	30%	26%
Email	39%	29%
Banner ad on a website	15% B	3%
Coupons.com	23% B	4%
Groupon	13% b	6%
LivingSocial	16% B	1%
SmartSource.com	13% b	6%

62% of members feel that human interaction is important when choosing a car wash. Again, members are seeking more than just a transactional relationship with the car wash that they frequent.

How important are each of the following when choosing a car wash? Top 2 Boxes	Members of Unlimited Wash Programs A	Non-Member Pro Washers B
<b>Total</b>	N=99	N=1183
<b>Human interaction (there is an employee who greets you and personally takes your payment)</b>	62% B	31%

Members of unlimited wash programs care significantly more about the philosophies and business practices of their car wash. This indicates that members care beyond just surface-level interactions with their car wash.

How important are each of the following to you? Top 2 Boxes	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>My local car wash is active in the community and supports the community.</b>	68% B	30%
<b>My local car wash supports car wash fundraising events for schools, local charities, etc.</b>	73% B	33%
<b>My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)</b>	71% B	60%

Unlimited wash program members are more satisfied consumers than non-member PRO washers.

Members of unlimited wash programs are significantly more satisfied (87% somewhat or very satisfied) with the value they receive than non-member PRO washers.

How satisfied are you with the price you pay per wash?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>Bottom 2</b>	3%	17%
<b>Very dissatisfied</b>	0%	3% <b>a</b>
<b>Somewhat dissatisfied</b>	3%	14% <b>A</b>
<b>Neither satisfied nor dissatisfied</b>	10%	21% <b>A</b>
<b>Somewhat satisfied</b>	33%	41%
<b>Very satisfied</b>	54% <b>B</b>	20%
<b>Top 2</b>	87% <b>B</b>	61%

Car washes rank as the second best overall consumer experience among other retailers for members compared to fifth for non-members.

Please rank the following businesses based on your overall experience as a consumer	Members of Unlimited Wash Programs A	Non-Members PRO Washers B
1	Grocery Store	Grocery Store
2	Car Wash	Sit-Down Restaurant
3	Sit-Down Restaurant	Mass Retailer
4	Mass Retailer	Quick-Serve Restaurant
5	Gas Station	Car Wash
6	Quick-Serve Restaurant	Gas Station
7	Bank	Hair Salon/Barber Shop
8	Home Improvement Store	Home Improvement Store
9	Hair Salon/Barber Shop	Dry Cleaner
10	Dry Cleaner	Bank

Not only are members more engaged and satisfied car wash consumers, they are more profitable.

Less than half of members of unlimited wash programs say they wash their vehicle more than once a month. More than half are not maximizing the value of their membership meaning greater profitability for car washes.

On average, how often do you wash your vehicle at a car wash?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>Once a year</b>	10% B	4%
<b>Every six months or so</b>	7%	12%
<b>Every couple of months</b>	23%	32% a
<b>Once a month</b>	13%	27% A
<b>A few times a month</b>	31% B	20%
<b>Once a week or more often</b>	15% B	5%

Members of unlimited wash programs have purchased significantly more additional services than non-member PRO washers.

Which of the following additional services have you purchased in the past year?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>Interior vacuuming (done by someone else for me)</b>	66% B	36%
<b>Interior vacuuming (self-service)</b>	54%	49%
<b>Wheel/rim cleaning</b>	56% B	40%
<b>Underbody cleaning (of vehicle)</b>	56% B	36%
<b>Tire shining</b>	59% B	37%
<b>Wax or paint protectant</b>	63% B	46%
<b>Exterior polishing</b>	58% B	33%
<b>Interior cleaning</b>	55% B	40%
<b>Vehicle hand/towel drying</b>	46% b	38%
<b>Interior fragrances/air freshener</b>	38% B	29%
<b>Other, please specify</b>	2% B	0%
<b>None of the above</b>	1%	16% A

And there's growing interest in these types of programs as membership has almost doubled in the last two years.

There's been a significant increase in the use of frequent wash programs in the last two years.

How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes	2014 PRO A	2016 PRO B
<b>Total</b>	N=1319	N=1281
<b>I'm a member of a frequent washer club</b>	11%	21% A

Members' attitudes drive their motivation to join an unlimited wash program.

Members of unlimited wash programs believe significantly more in the importance and necessity of washing their vehicle than non-member PRO washers.

Which statement do you most agree with?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	87% B	66%
<b>Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me</b>	9%	23% A
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	4%	11% A

Members of unlimited wash programs believe significantly more in the benefits of using a PRO wash than non-members.

How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>It is safer for the environment than washing at home</b>	66% B	39%
<b>It uses less water than washing at home</b>	75% B	54%
<b>I want the vehicle to look good for special occasions</b>	84% B	73%
<b>It's part of my car maintenance routine</b>	84% B	68%
<b>It's convenient to wash my vehicle while I am doing something else, like buying gas</b>	71% B	57%
<b>It's a fun family activity</b>	67% B	30%
<b>I have a coupon or other price discount</b>	63% B	41%
<b>I'm a member of a frequent washer club</b>	77% B	16%

All additional services are significantly more important to members of unlimited wash programs than non-member PRO washers. This demonstrates that members believe that extra touch and care is important to the maintenance of their vehicle.

How important are each of the following additional services at a car wash? Top 2 Boxes	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>Having the interior vacuumed for me</b>	77% B	47%
<b>Being able to vacuum the interior myself</b>	62% B	47%
<b>Having the wheels and rims cleaned</b>	83% B	65%
<b>Having the underbody of the vehicle cleaned</b>	83% B	60%
<b>Having the tires shined</b>	83% B	48%
<b>Having a wax or paint protectant applied</b>	89% B	57%
<b>Having the exterior polished</b>	83% B	54%
<b>Having the interior cleaned</b>	79% B	58%
<b>Having the vehicle hand towel dried</b>	76% B	48%
<b>Having a fragrance added to the interior</b>	68% B	32%

Even the brand of soap used is significantly more important to members than non-member PRO washers. They are true fanatics of washing their vehicle.

How important is the brand of soap used to wash your vehicle?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B
<b>Total</b>	N=99	N=1183
<b>Bottom 2</b>	15%	39% <b>A</b>
<b>Not at all important</b>	1%	15% <b>A</b>
<b>Not very important</b>	14%	24% <b>A</b>
<b>Somewhat important</b>	22%	33% <b>A</b>
<b>Very important</b>	29% <b>B</b>	20%
<b>Extremely important</b>	33% <b>B</b>	8%
<b>Top 2</b>	63% <b>B</b>	29%

There is a specific consumer profile that is most receptive and opportune to the unlimited wash program offering.

Members of unlimited wash programs are more likely to be younger.

Which range includes your age?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B	Index (Members vs. non-members)
<b>Total</b>	N=99	N=1183	
<b>18-24</b>	22% <b>B</b>	13%	169
<b>25-34</b>	31% <b>B</b>	18%	172
<b>35-44</b>	25% <b>b</b>	18%	139
<b>45-54</b>	10%	20% <b>A</b>	50
<b>55-64</b>	4%	17% <b>A</b>	24
<b>65+</b>	6%	15% <b>A</b>	40

Members of unlimited wash programs are more likely to be single.

	<b>Members of Unlimited Wash Programs A</b>	<b>Non-Member PRO Washers B</b>	<b>Index (Members vs. non-members)</b>
<b>Total</b>	N=99	N=1183	
<b>Single</b>	40% B	27%	148
<b>Living with someone but not married</b>	7%	8%	88
<b>Engaged to be married/Married/Domestic Partnership</b>	49%	50%	98
<b>Divorced/Widowed/Separated</b>	4%	15% A	27

Members of unlimited wash programs are more likely to be employed full-time.

	<b>Members of Unlimited Wash Programs A</b>	<b>Non-Member PRO Washers B</b>	<b>Index (Members vs. non- members)</b>
<b>Total</b>	N=99	N=1183	
<b>Employed full-time</b>	68% <b>B</b>	44%	155
<b>Employed part-time</b>	11%	10%	110
<b>Not currently employed</b>	1%	5% <b>a</b>	20
<b>Self-employed</b>	2%	6% <b>a</b>	33
<b>Student</b>	10% <b>B</b>	5%	200
<b>Homemaker</b>	3%	9% <b>a</b>	33
<b>Retired</b>	3%	20% <b>A</b>	15
<b>Other</b>	0%	1%	0

Members of unlimited wash programs have higher household incomes.

	<b>Members of Unlimited Wash Programs A</b>	<b>Non-Member Pro Washers B</b>	<b>Index (Members vs. non- members)</b>
<b>Total</b>	N=99	N=1183	
<b>Under \$20,000</b>	6%	17% <b>A</b>	35
<b>\$20,000-\$29,999</b>	9%	10%	90
<b>\$30,000-\$39,999</b>	8%	10%	80
<b>\$40,000-\$49,999</b>	10%	10%	100
<b>\$50,000-\$59,999</b>	9%	8%	113
<b>\$60,000-\$74,999</b>	10%	10%	100
<b>\$75,000-\$99,999</b>	17%	12%	142
<b>\$100,000-\$149,999</b>	15%	12%	125
<b>\$150,000 or over</b>	14%	10%	140

Members of unlimited wash programs are more likely to own younger vehicles.

How old is the vehicle (car, van, truck or SUV) you drive most often?	Members of Unlimited Wash Programs A	Non-Member PRO Washers B	Index (Members vs. non-members)
<b>Total</b>	N=99	N=1183	
<b>Less than 1 year old</b>	21% B	8%	263
<b>1-3 years' old</b>	36% B	27%	133
<b>4-5 years' old</b>	22%	18%	122
<b>6-9 years' old</b>	10%	18% A	56
<b>More than 10 years' old</b>	9%	29% A	31

Members of unlimited wash programs are more likely to drive their vehicles more.

	<b>Members of Unlimited Wash Programs A</b>	<b>Non-Member PRO Washers B</b>	<b>Index (Members vs. non-members)</b>
<b>Total</b>	N=99	N=1183	
<b>Less than 2,500</b>	8%	9%	89
<b>2,501-5,000</b>	11%	15%	73
<b>5,001-10,000</b>	27%	25%	108
<b>10,001-15,000</b>	18%	27% A	67
<b>15,001-25,000</b>	27% B	12%	225
<b>More than 25,000</b>	7%	4%	175
<b>I don't know</b>	1%	7% A	14

Members are more likely to be from the Western region of the U.S.

	<b>Members of Unlimited Wash Programs A</b>	<b>Non-Member PRO Washers B</b>	<b>Index (Members vs. non- members)</b>
<b>Total</b>	N=99	N=1183	
<b>Northeast</b>	19%	17%	112
<b>South</b>	23%	34% <b>A</b>	68
<b>Midwest</b>	15%	22%	68
<b>Southwest</b>	7%	5%	140
<b>West</b>	<b>33% <b>B</b></b>	21%	<b>157</b>



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## Detailed Findings: 2014 versus 2016 PRO, DIY & NON Washers

*Readers Note: In this section of the report, we look at the characteristics of three distinct cohorts among all respondents to the survey. 1) All respondents who have washed their vehicle at a professional car wash (PRO) in the past year; 2) All respondents who have washed their vehicle at home (DIY) in the past year, and; 3) All respondents who have not washed their vehicle at all in the past year (NON).*

Total Past Year PRO Consumers (80%)

Total Past Year DIY (54%)

Total Past Year NON (4%)



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## Detailed Findings: 2014 vs. 2016 PRO, DIY & NON Washers

*Readers Note: In this sub-section of the report, we analyze all respondents who have washed their vehicle at a professional car wash (PRO) in the past year from 2014 to 2016.*

**Total Past Year PRO Consumers (80%)**

Total Past Year DIY (54%)

Total Past Year NON (4%)

80% washed their car at a PRO wash at least once in the past year.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>PRO</b>	79%	80%
<b>DIY</b>	46%	54% <b>A</b>

Both rational and emotional reasons for using a car wash have significantly increased among PRO users since 2014.

How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes	2014 PRO A	2016 PRO B
<b>Total</b>	N=1319	N=1281
<b>A clean vehicle makes me feel good</b>	75%	87% A
<b>I want the vehicle to look good for special occasions</b>	73%	74%
<b>Washing helps protect the value of my vehicle</b>	72%	80% A
<b>A clean vehicle is a good reflection on me</b>	69%	77% A
<b>A clean vehicle makes me feel proud</b>	67%	N/A
<b>I want to prevent my vehicle from rusting</b>	67%	77% A
<b>It saves time</b>	65%	75% A
<b>A clean vehicle makes me feel better about myself</b>	61%	N/A
<b>It's a treat to have my vehicle washed</b>	59%	68% A
<b>When the weather is nice, I enjoy getting a car wash</b>	58%	60%
<b>It's part of my car maintenance routine</b>	55%	69% A

Both rational and emotional reasons for using a car wash have significantly increased among PRO users since 2014.

<b>How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>A car wash does a better job than I can do myself</b>	48%	62% A
<b>I don't enjoy doing it myself</b>	46%	50% A
<b>I have a coupon or other price discount</b>	41%	42%
<b>It's convenient to wash my vehicle while I am doing something else, like buying gas</b>	39%	58% A
<b>It's fun to have my vehicle washed</b>	38%	N/A
<b>I personally enjoy the experience</b>	35%	N/A
<b>It is safer for the environment than washing at home</b>	26%	42% A
<b>It uses less water than washing at home</b>	N/A	56%
<b>It costs less money than washing the vehicle myself</b>	18%	32% A
<b>It's a fun family activity</b>	15%	32% A
<b>I'm a member of a frequent washer club</b>	11%	21% A

Q: How much do you agree or disagree with each of the following statements? I use a car wash because: (5 point scale; Agree strongly/Agree somewhat).

Convenience is still the top influence of consumers' preference for one car wash over another despite a small decrease in agreement from 2014. Other reasons for using a particular PRO wash over another significantly decreased from 2014 to 2016.

<b>Why do you choose to wash your vehicle at this particular car wash INSTEAD OF another car wash?</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>It is convenient</b>	62%	59%
<b>It is a good value</b>	49% B	35%
<b>The lines are never too long</b>	38% B	30%
<b>It is inexpensive</b>	33% B	27%
<b>The car looks great when they're done</b>	43% B	27%
<b>I trust that my car will be safe</b>	33% B	24%
<b>It is clean and inviting</b>	28% B	23%
<b>I feel personally safe when I am there</b>	30% B	22%
<b>The employees are friendly and professional</b>	28% B	21%
<b>I can sit inside the car when it goes through the wash</b>	30% B	20%
<b>It's where I buy gas or do other shopping</b>	13%	14%
<b>They offer discounts and coupons</b>	28% B	13%
<b>The interior waiting area is clean</b>	16% B	13%

Only 6% said they chose one PRO wash over another, because it offered a monthly unlimited wash program. However, this may be affected by the low awareness of these types of programs.

<b>Why do you choose to wash your vehicle at this particular car wash INSTEAD OF another car wash?</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>It's the car wash my family and friends prefer</b>	7%	11% <b>A</b>
<b>The wash process is fun to experience or watch</b>	10%	11%
<b>They use less water</b>	N/A	9%
<b>They use soap that is safe for the environment</b>	N/A	9%
<b>They are involved in the community</b>	N/A	9%
<b>My kids enjoy it</b>	6%	8% <b>A</b>
<b>They offer a free exterior re-wash if it rains/snows within 5 days</b>	14% <b>B</b>	8%
<b>There are snacks or beverages for sale while I wait</b>	7%	8%
<b>They offer free coffee, tea or water</b>	7%	8%
<b>They recycle the wash water</b>	N/A	8%
<b>They offer a monthly unlimited washing program/subscription</b>	11% <b>B</b>	6%
<b>Other (please specify)</b>	3%	3%
<b>None of the above</b>	3%	3%

All aspects of a car wash increased significantly in importance from 2014 among PRO washers.

<b>How important are each of the following aspects of a car wash to you? Top 2 Boxes</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>Cleanliness (the vehicle is clean, all dirt has been removed)</b>	87%	93% A
<b>Price (it is a good value)</b>	80%	87% A
<b>Shininess (the vehicle is shiny and bright)</b>	67%	76% A
<b>Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)</b>	65%	81% A
<b>Dryness (the vehicle is dry, there is no water or soap remaining)</b>	64%	76% A
<b>Speed (I can get in and out quickly)</b>	57%	75% A
<b>Hours of operation (the car wash is open when I want a wash)</b>	N/A	73%
<b>Human interaction (there is an employee who greets you and personally takes your payment)</b>	N/A	34%
<b>Self-service (a touch screen or pay station takes your payment)</b>	N/A	44%

All additional car wash services have increased significantly in importance among PRO consumers since 2014.

<b>How important are each of the following additional services at a car wash? Top 2 Boxes</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>Having the underbody of the vehicle cleaned</b>	46%	62% A
<b>Having the interior vacuumed for me</b>	43%	49% A
<b>Having a wax or paint protectant applied</b>	43%	59% A
<b>Having the wheels specially cleaned</b>	42%	N/A
<b>Having the vehicle hand towel dried</b>	37%	50% A
<b>Getting my tires dressed or shined</b>	36%	N/A
<b>Being able to vacuum the interior myself</b>	33%	48% A
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	27%	N/A
<b>Having a fragrance added to the interior</b>	19%	35% A
<b>Having the wheels and rims cleaned</b>	N/A	66%
<b>Having the exterior polished</b>	N/A	56%
<b>Having the interior cleaned</b>	N/A	60%
<b>Having the tires shined</b>	N/A	51%

Almost all additional services are worth paying more for among PRO consumers, significantly more so than in 2014.

<b>Which of the following additional services at a car wash is WORTH PAYING MORE FOR?</b>	<b>2014 PRO A</b>	<b>2016 PRO B</b>
<b>Total</b>	N=1319	N=1281
<b>Having the underbody of the vehicle cleaned</b>	35%	42% A
<b>Having the interior vacuumed for me</b>	44%	46%
<b>Having a wax or paint protectant applied</b>	46%	52% A
<b>Having the wheels specially cleaned</b>	31%	N/A
<b>Having the vehicle hand towel dried</b>	25%	30% A
<b>Getting my tires dressed or shined</b>	26%	N/A
<b>Being able to vacuum the interior myself</b>	14%	22% A
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	44%	N/A
<b>Having a fragrance added to the interior</b>	11%	18% A
<b>Having the wheels and rims cleaned</b>	N/A	38%
<b>Having the exterior polished</b>	N/A	40%
<b>Having the interior cleaned</b>	N/A	44%
<b>Having the tires shined</b>	N/A	32%
<b>None of the above</b>	N/A	11%

As was the case in 2014, there are still significant gaps between what consumers say are important to them and what they are willing to pay more for.

<b>Car Wash Services: Total PRO Users</b>	<b>2016 Importance</b>	<b>2016 Worth Paying More For</b>	<b>Gap</b>
<b>Total</b>	N=1319	N=1281	
<b>Having the wheels and rims cleaned</b>	66%	38%	-28
<b>Being able to vacuum the interior myself</b>	48%	22%	-26
<b>Having the underbody of the vehicle cleaned</b>	62%	42%	-20
<b>Having the vehicle hand towel dried</b>	50%	30%	-20
<b>Having the tires shined</b>	51%	32%	-19
<b>Having a fragrance added to the interior</b>	35%	18%	-17
<b>Having the exterior polished</b>	56%	40%	-16
<b>Having the interior cleaned</b>	60%	44%	-16
<b>Having a wax or paint protectant applied</b>	59%	52%	-7
<b>Having the interior vacuumed for me</b>	49%	46%	-3



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## Detailed Findings: 2014 vs. 2016 PRO, DIY & NON Washers

*Readers Note: In this sub-section of the report, we analyze all respondents who have washed their vehicle at home (DIY) in the past year from 2014 to 2016.*

Total Past Year PRO Consumers (80%)

**Total Past Year DIY (54%)**

Total Past Year NON (4%)

54% of respondents washed their car at home at least once in the past year, a significant increase from 2014 to 2016.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>PRO</b>	79%	80%
<b>DIY</b>	46%	54% <b>A</b>

Cost is still the single biggest reason for washing a vehicle at home instead of using a PRO wash. However, other emotional benefits of washing at home significantly increased since 2014 suggesting DIY washers enjoy washing their vehicle at home more than they did just two years ago.

<b>How much do you agree or disagree with each of the following statements about your decision to wash your vehicle at home INSTEAD OF using a car wash? Top 2 Boxes</b>	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>It costs less</b>	81%	90% <b>A</b>
<b>I do a more thorough job than a car wash does</b>	64%	69%
<b>I like to do it myself</b>	61%	74% <b>A</b>
<b>I enjoy washing my vehicle myself when the weather is nice</b>	60%	77% <b>A</b>
<b>It's fun to wash my car</b>	47%	60% <b>A</b>
<b>I worry that the car wash will damage my car</b>	45%	52%
<b>It's part of my routine</b>	43%	60% <b>A</b>
<b>Washing my vehicle at a car wash doesn't really save time</b>	40%	39%
<b>Washing my vehicle myself is safer for the environment</b>	38%	46% <b>a</b>
<b>I don't trust car wash employees</b>	28%	30%
<b>It's a fun family activity</b>	24%	41% <b>A</b>
<b>Washing my vehicle myself uses less water</b>	N/A	54%

Q: How much do you agree or disagree with each of the following statements about your decision to wash your vehicle at home INSTEAD OF using a car wash? (5 point scale; Agree strongly/Agree somewhat). Note: This sub-sample of DIY washers are those who only washed at home in order to analyze why they washed at home instead of using a PRO wash.



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## Detailed Findings: 2014 vs. 2016 PRO, DIY & NON Washers

*Readers Note: In this sub-section of the report, we analyze all respondents who have not washed their vehicle (NON) in the past year from 2014 to 2016.*

Total Past Year PRO Consumers (80%)

Total Past Year DIY (54%)

**Total Past Year NON (4%)**

No significant change in NON washers from 2014 to 2016.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Washed</b>	95%	96%
<b>Did Not Wash</b>	5%	4%

Cost is now the number one reason for not using a PRO wash among NON washers. Apathy dropped significantly as a reason since two years ago.

<b>Which of the following factors influenced your decision to NOT wash your vehicle at a car wash?</b>	<b>2014 NON A</b>	<b>2016 NON B</b>
<b>Total</b>	N=81	N=72
<b>Having a clean car isn't that important to me</b>	49% B	32%
<b>The vehicle will just get dirty again quickly after being washed</b>	41%	29%
<b>Costs too much</b>	35%	42%
<b>Takes too much time</b>	32%	32%
<b>The vehicle is older</b>	16%	28% a
<b>Concern that the weather will be bad after I wash the vehicle and it will get dirty</b>	16% B	6%
<b>Location is not convenient</b>	12%	10%
<b>Worry about damaging the car</b>	11%	7%
<b>No coupons or discount offers</b>	10%	17%
<b>I don't think car washes are safe for the environment</b>	10%	11%
<b>Lack of confidence that the car wash would do a good job</b>	5%	6%
<b>Concerns about the equipment used at the car wash</b>	2%	1%
<b>The car wash was not attractive and clean</b>	1%	3%
<b>No gas station at the car wash</b>	1%	0%



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## Detailed Findings: Age of Vehicle

**Usage**  
Overall Attitudes

More Americans had significantly newer vehicles from 2014 to 2016 with 35% of respondents saying their car is between 0-3 years' old.

<b>How old is the vehicle (car, van, truck or SUV) you drive most often?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>0-3 years' old</b>	28%	35% <b>A</b>
<b>4-9 years' old</b>	39% <b>B</b>	34%
<b>More than 10 years' old</b>	33%	32%

Respondents with newer vehicles (0-3 & 4-9 years) washed their vehicle significantly more at a variety of PRO car washes and at home than they did in 2014.

<b>Age of Vehicle vs. PRO Car Wash Used</b>	<b>2014 (0-3 yrs) A</b>	<b>2014 (4-9 yrs) B</b>	<b>2014 (&gt; 10 yrs) C</b>	<b>2016 (0-3 yrs) D</b>	<b>2016 (4-9 yrs) E</b>	<b>2016 (&gt; 10 yrs) F</b>
<b>Total</b>	N=471	N=649	N=555	N=555	N=544	N=506
<b>Used a full-service car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (includes interior cleaning)</b>	41%	33%	23%	50% A	40% B	21%
<b>Used an exterior car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (does not include interior cleaning)</b>	38%	35%	27%	39%	37%	28%
<b>Used an automatic car wash where the vehicle is stationary but the machine moves around the vehicle</b>	30%	33%	30%	35%	37%	26%
<b>Used a car wash where employees clean the vehicle by hand</b>	17%	16%	12%	28% A	23% B	11%
<b>Used a self-service car wash (do-it-yourself with a spray wand)</b>	22%	24%	28%	30% A	35% B	31%
<b>Washed my vehicle at home</b>	41%	45%	50%	56% A	52% B	54%
<b>I haven't washed my car in the past year</b>	3%	6%	5%	3%	3%	8% C



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## Detailed Findings: Age of Vehicle

Usage  
**Overall Attitudes**

Respondents with newer vehicles (0-3 & 4-9 yrs) agreed significantly more than in 2014 that washing their car is important and necessary.

<b>Age of Vehicle vs. Washing Attitudes</b>	<b>2014 (0-3 yrs) A</b>	<b>2014 (4-9 yrs) B</b>	<b>2014 (&gt; 10 yrs) C</b>	<b>2016 (0-3 yrs) D</b>	<b>2016 (4-9 yrs) E</b>	<b>2016 (&gt; 10 yrs) F</b>
<b>Total</b>	N=471	N=649	N=555	N=555	N=544	N=506
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	64%	51%	47%	74% A	66% B	51%
<b>Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me</b>	25% D	28% E	24%	18%	22%	26%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	11% D	21% E	29% F	7%	13%	23%

Across most measures, all agree significantly more than they did in 2014 with the benefits of washing a car at a PRO car wash regardless of age of vehicle.

<b>Age of Vehicle vs. PRO Wash Attitudes</b>	<b>2014 (0-3 yrs) A</b>	<b>2014 (4-9 yrs) B</b>	<b>2014 (&gt; 10 yrs) C</b>	<b>2016 (0-3 yrs) D</b>	<b>2016 (4-9 yrs) E</b>	<b>2016 (&gt; 10 yrs) F</b>
<b>Total</b>	N=471	N=649	N=555	N=555	N=544	N=506
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	45%	39%	39%	60% A	57% B	48% C
<b>Washing a car at a car wash is less work than washing a car at home</b>	90%	90%	87%	87%	91%	88%
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	65%	60%	60%	71% A	71% B	67% C
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	30%	21%	21%	38% A	41% B	31% C
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	49%	46%	44%	59% A	63% B	59% C
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	41%	37%	31%	57% A	53% B	42% C
<b>Washing at a car wash costs less than washing a car at home</b>	26%	20%	21%	38% A	36% B	27% C
<b>Washing a car at a car wash is faster than washing at home</b>	87%	87%	83%	84%	89%	85%
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	77%	76%	71%	80%	81% B	73%

Respondents with newer vehicles (0-3 & 4-9 years) are significantly more environmentally conscious than they were in 2014.

<b>Age of Vehicle vs. Environmental Attitudes</b>	<b>2014 (0-3 yrs) A</b>	<b>2014 (4-9 yrs) B</b>	<b>2014 (&gt; 10 yrs) C</b>	<b>2016 (0-3 yrs) D</b>	<b>2016 (4-9 yrs) E</b>	<b>2016 (&gt; 10 yrs) F</b>
<b>Total</b>	N=471	N=649	N=555	N=555	N=544	N=506
<b>I recycle</b>	79%	79%	82%	84% A	85% B	80%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	40%	34%	36%	45%	47% B	35%
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	30%	26%	28%	39% A	40% B	32%
<b>None of the above</b>	13%	17%	14%	8% A	8% B	14%



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

*Readers Note: In this section of the report, we analyze the differences between two distinct cohorts. 1) Respondents who have washed their vehicle at a professional car wash (PRO) most often in the past year; 2) Respondents who have washed their vehicle at home (DIY) most often in the past year.*

Among those who washed their vehicle in the past year, 69.2% washed at a PRO wash most often versus 30.8% for those who washed at home most often.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N= 1594	N= 1534
<b>PRO Most Often</b>	71.6%	69.2%
<b>DIY Most Often</b>	28.4%	30.8%



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

### **Demographic Profile**

Usage

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Monthly Unlimited Wash Programs

Washing Vehicles with Safety Features

# Gender

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Male</b>	44%	56% <b>A</b>
<b>Female</b>	56% <b>B</b>	44%

# Age

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>18-24</b>	14% <b>b</b>	11%
<b>25-34</b>	19% <b>B</b>	14%
<b>35-44</b>	18%	17%
<b>45-54</b>	19%	21%
<b>55-64</b>	15%	20% <b>A</b>
<b>65+</b>	15%	18%

# Household Income

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Under \$20,000</b>	17%	20%
<b>\$20,000-\$29,999</b>	10%	13% <b>a</b>
<b>\$30,000-\$39,999</b>	9%	11%
<b>\$40,000-\$49,999</b>	10%	11%
<b>\$50,000-\$59,999</b>	8%	8%
<b>\$60,000-\$74,999</b>	10%	9%
<b>\$75,000-\$99,999</b>	12%	11%
<b>\$100,000-\$149,999</b>	13% <b>b</b>	10%
<b>\$150,000 or over</b>	11%	9%

# Marital Status

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Single</b>	29%	29%
<b>Living with someone but not married</b>	8%	7%
<b>Engaged to be married / Married / Domestic Partnership</b>	49%	54% <b>A</b>
<b>Divorced / Widowed / Separated</b>	15% <b>B</b>	11%

## Race or Ethnicity

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>White/Caucasian</b>	60%	71% <b>A</b>
<b>Spanish/Hispanic/Latino</b>	18% <b>B</b>	12%
<b>Black/African American</b>	13% <b>B</b>	8%
<b>Asian</b>	5%	4%
<b>Pacific Islander</b>	0%	0%
<b>Native American</b>	1%	1%
<b>Other</b>	2%	4% <b>A</b>

# Education

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Did not complete high school</b>	2%	5% <b>A</b>
<b>High school graduate or equivalent</b>	20%	19%
<b>Some college or trade school</b>	28%	27%
<b>College or trade school graduate</b>	37%	38%
<b>Post graduate</b>	13%	11%

# Employment

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Employed full-time</b>	45% <b>B</b>	37%
<b>Employed part-time</b>	10%	9%
<b>Not currently employed</b>	5%	8% <b>A</b>
<b>Self-employed</b>	6%	6%
<b>Student</b>	5%	5%
<b>Homemaker</b>	8%	9%
<b>Retired</b>	19%	24% <b>A</b>
<b>Other</b>	1%	2% <b>a</b>

# Regionality

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Northeast</b>	18%	18%
<b>South</b>	31%	40% <b>A</b>
<b>Midwest</b>	22% <b>B</b>	15%
<b>Southwest</b>	6%	5%
<b>West</b>	23%	22%

# Age of Vehicle

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Less than 1 year old</b>	9%	9%
<b>1-3 years' old</b>	27%	24%
<b>4-5 years' old</b>	20% <b>B</b>	11%
<b>6-9 years' old</b>	18%	16%
<b>More than 10 years' old</b>	26%	40% <b>A</b>

## Driving Miles Per Year

	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=472
<b>Less than 2,500</b>	10%	15% <b>A</b>
<b>2,501-5,000</b>	15%	15%
<b>5,001-10,000</b>	26%	24%
<b>10,001-15,000</b>	26%	24%
<b>15,001-25,000</b>	13%	12%
<b>More than 25,000</b>	4%	4%
<b>I don't know</b>	6%	7%



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

Demographic Profile

**Usage**

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Monthly Unlimited Wash Programs

Washing Vehicles with Safety Features

PRO most often wash their vehicles more often at a PRO wash than DIY most often.

<b>On average, how often do you wash your vehicle at a car wash?</b>	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=220
<b>Once a year</b>	4%	5%
<b>Every six months or so</b>	11%	15%
<b>Every couple of months</b>	30%	38% <b>A</b>
<b>Once a month</b>	27% <b>b</b>	20%
<b>A few times a month</b>	22%	18%
<b>Once a week or more often</b>	6%	4%

PRO most often used significantly more types of PRO washes in the past year than DIY most often.

Which of the following have you done in the past year to wash your vehicle?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=472
<b>Full</b>	50% B	14%
<b>Exterior</b>	44% B	19%
<b>Stationary</b>	42% B	17%
<b>Hand</b>	27% B	10%
<b>Self</b>	38% B	24%
<b>DIY</b>	37%	100% A

PRO most often are very satisfied (24%) with the price they pay per wash, significantly more satisfied than DIY most often.

How satisfied are you with the price you pay per wash?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>Very dissatisfied</b>	2%	4%
<b>Somewhat dissatisfied</b>	13%	14%
<b>Neither satisfied nor dissatisfied</b>	20%	25% <sup>a</sup>
<b>Somewhat satisfied</b>	40%	41%
<b>Very satisfied</b>	24% <sup>B</sup>	16%

PRO most often purchased more additional car wash services than DIY most often.

Which of the following additional services have you purchased in the past year?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>Interior vacuuming (done by someone else for me)</b>	41% B	28%
<b>Interior vacuuming (self-service)</b>	49%	53%
<b>Wheel/rim cleaning</b>	43% B	35%
<b>Underbody cleaning (of vehicle)</b>	39% B	31%
<b>Tire shining</b>	39%	35%
<b>Wax or paint protectant</b>	49% b	42%
<b>Exterior polishing</b>	36%	30%
<b>Interior cleaning</b>	43% B	34%
<b>Vehicle hand/towel drying</b>	40% B	32%
<b>Interior fragrances/air freshener</b>	30%	26%
<b>Other, please specify</b>	1%	0%
<b>None of the above</b>	14%	20% A



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

Demographic Profile

Usage

**Attitudes, Benefits & Barriers**

Online Car Wash Media Consumption

Monthly Unlimited Wash Programs

Washing Vehicles with Safety Features

Roughly, two-thirds of both cohorts believe that washing a vehicle is an important and necessary part of routine maintenance.

Which statement do you most agree with?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=472
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	68% <b>b</b>	63%
<b>Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me</b>	22%	22%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	10%	15% <b>A</b>

Both cohorts were influenced to visit a particular car wash for the first time, because it was convenient and secondly, because it was a good value.

<b>Still thinking about the car wash you use most often, what made you go there the first time?</b>	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=220
<b>It was convenient</b>	79%	78%
<b>I could get gas or do other shopping</b>	17%	15%
<b>It was inexpensive</b>	29% <b>b</b>	23%
<b>It was a good value</b>	43%	45%
<b>The employees seemed friendly and professional</b>	23%	18%
<b>I could trust that my car would be safe</b>	26%	24%
<b>The lines were not too long</b>	39%	39%
<b>Other cars looked great when they were done</b>	23%	22%
<b>I assumed I would feel personally safe when I was there</b>	23%	18%
<b>They offered discounts and coupons</b>	18%	15%
<b>Someone else recommended it</b>	21%	17%
<b>The car wash was clean and inviting</b>	32% <b>b</b>	26%
<b>The wash process was fun to watch</b>	15% <b>B</b>	9%

For both cohorts, the emotional benefits are the most influential reasons for using a PRO wash.

<b>How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes</b>	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Total</b>	N=1062	N=220
<b>I don't enjoy washing it myself</b>	55% B	24%
<b>A clean vehicle makes me feel good</b>	86%	89%
<b>A clean vehicle makes me feel proud</b>	0%	0%
<b>A clean vehicle makes me feel better about myself</b>	0%	0%
<b>A clean vehicle is a good reflection on me</b>	77%	78%
<b>A car wash does a better job than I can do myself</b>	67% B	38%
<b>It saves time</b>	76%	72%
<b>It costs less money than washing the vehicle myself</b>	34% B	22%
<b>It's a treat to have my vehicle washed</b>	68%	71%
<b>It's fun to have my vehicle washed</b>	0%	0%
<b>Washing helps protect the value of my vehicle</b>	80%	81%

The most important aspect of a PRO wash to both cohorts is cleanliness. PRO most often care more about hours of operation and human interaction. DIY most often care more about price.

How important are each of the following when choosing a car wash? Top 2 Boxes	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>Cleanliness</b>	92%	95%
<b>Dryness</b>	75%	78%
<b>Shininess</b>	76%	79%
<b>Speed</b>	75%	75%
<b>Convenience</b>	80%	82%
<b>Price</b>	86%	91% A
<b>Hours of operation</b>	74% B	67%
<b>Human interaction</b>	35% B	26%
<b>Self-service</b>	44%	45%

Both cohorts agree that having the wheels and rims cleaned is the most important additional service. PRO most often believe significantly more that having the interior vacuumed and cleaned, hand drying the vehicle, and adding a fragrance is important.

How important are each of the following additional services at a car wash? Top 2 Boxes	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>Having the interior vacuumed for me</b>	50% B	42%
<b>Being able to vacuum the interior myself</b>	48%	48%
<b>Having the wheels and rims cleaned</b>	66%	67%
<b>Having the underbody of the vehicle cleaned</b>	61%	61%
<b>Having the tires shined</b>	51%	46%
<b>Having a wax or paint protectant applied</b>	60%	56%
<b>Having the exterior polished</b>	56%	57%
<b>Having the interior cleaned</b>	61% B	54%
<b>Having the vehicle hand towel dried</b>	52% B	42%
<b>Having a fragrance added to the interior</b>	37% B	29%

More than half of both cohorts reported they would use a car wash over another if it was convenient.

Why do you choose to wash your vehicle at this particular car wash <b>INSTEAD OF</b> another car wash?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>It is convenient</b>	58%	60%
<b>It's where I buy gas or do other shopping</b>	15% B	9%
<b>It is inexpensive</b>	28% b	22%
<b>It is a good value</b>	36% b	30%
<b>The employees are friendly and professional</b>	23% B	14%
<b>I trust that my car will be safe</b>	25% B	19%
<b>The lines are never too long</b>	31%	26%
<b>The car looks great when they're done</b>	28%	24%
<b>I feel personally safe when I am there</b>	24% B	15%
<b>They offer discounts and coupons</b>	13%	15%
<b>It's the car wash my family and friends prefer</b>	11%	9%
<b>It is clean and inviting</b>	24%	20%
<b>The wash process is fun to experience or watch</b>	12% B	7%

PRO most often agree significantly more with the benefits of washing at a PRO wash than DIY most often.

Please indicate whether you agree or disagree with each of the following statements.	PRO Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=472
<b>Washing a car at a car wash is less work than washing a car at home</b>	92% B	83%
<b>Washing a car at a car wash is faster than washing a car at home</b>	91% B	75%
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	89% B	55%
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	72% B	36%
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	72% B	35%
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	64% B	24%
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	46% B	13%
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	47% B	17%
<b>Washing a car at a car wash costs less than washing a car at home</b>	43% B	18%
<b>Washing at a car wash uses less water than washing a car at home</b>	70% B	41%

PRO most often feel it is important that their local car wash is supportive of their community and aware of their environmental impact, significantly more than DIY most often.

How important are each of the following to you? Top 2 Boxes	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>My local car wash is active in the community and supports the community.</b>	35% <b>B</b>	25%
<b>My local car wash supports car wash fundraising events for schools, local charities, etc.</b>	37%	33%
<b>My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)</b>	62% <b>B</b>	53%

A large majority of both cohorts recycle. PRO most often purchase environmentally friendly products more than DIY most often.

Which of the following statements do you agree with?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=472
<b>I recycle</b>	83%	84%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	46% B	39%
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	38%	38%
<b>None of the above</b>	9%	11%



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

Demographic Profile

Usage

Attitudes, Benefits & Barriers

**Online Car Wash Media Consumption**

Monthly Unlimited Wash Programs

Washing Vehicles with Safety Features

PRO most often received more communications from a car wash in the past year (15%) than DIY most often did (6%), but a large portion of both cohorts did not receive any type of communication or offer from a car wash in the past year (less than 15% received).

Have you received any online communications or promotional offers from a car wash in the past year?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=472
<b>Yes</b>	15% B	6%
<b>No</b>	85%	94% A

Email and Facebook are the primary channels for both cohorts to have received communications or offers.

Still thinking about the past year, from which of the following sources have you received car wash communications or promotional offers?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=154	N=26
<b>Facebook</b>	39%	42%
<b>Twitter</b>	25%	27%
<b>Search engine (Google/Yahoo/Bing)</b>	24% <b>b</b>	8%
<b>Car wash website</b>	34%	31%
<b>Email</b>	42%	35%
<b>Banner ad on a website</b>	16% <b>B</b>	0%
<b>Coupons.com</b>	19%	19%
<b>Groupon</b>	16%	31% <b>a</b>
<b>LivingSocial</b>	17% <b>b</b>	4%
<b>SmartSource.com</b>	16%	8%

Email is where the majority of both cohorts redeemed coupons or offers.

Have you used any car wash coupons or promotional offers from any of the following in the past year?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=154	N=26
<b>Facebook</b>	31%	15%
<b>Twitter</b>	18%	12%
<b>Search Engine (Google/Yahoo/Bing)</b>	18% <sup>b</sup>	4%
<b>Car wash website</b>	26%	23%
<b>Email</b>	33%	23%
<b>Banner ad on a website</b>	8%	0%
<b>Coupons.com</b>	12%	8%
<b>Groupon</b>	7%	12%
<b>LivingSocial</b>	7%	0%
<b>SmartSource.com</b>	10%	4%



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

Demographic Profile

Usage

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

**Monthly Unlimited Wash Programs**

Washing Vehicles with Safety Features

PRO most often are significantly more aware of a monthly unlimited wash program at the car wash that they frequent than DIY most often.

Are you aware of a monthly unlimited washing program/subscription at a car wash that you frequent?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=220
<b>Yes</b>	23% B	14%
<b>No</b>	77%	86% A

Significantly more PRO most often are members of a monthly unlimited wash program than DIY most often.

Are you a member of a monthly unlimited washing program/ subscription at a car wash?	Pro Most Often A	DIY Most Often B
<b>Aware of a Monthly Car Wash Program</b>	N=245	N=31
<b>Yes</b>	39% B	13%
<b>No</b>	62%	87% A

PRO most often joined a monthly car wash program, because 'it is a better value'. For DIY most often, sample size is too small to analyze.

<b>Why did you join a monthly unlimited washing program/subscription?</b>	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Member of a Monthly Car Wash Program</b>	N=95	N=4
<b>It is a better value</b>	75%	100%
<b>I get a wider variety of services for the price</b>	43%	75%
<b>It eliminates the risk of bad weather (i.e. the car getting dirty soon after being washed)</b>	42%	50%
<b>I like keeping my car clean all the time</b>	54%	75%
<b>A clean vehicle makes me feel better about myself</b>	48%	75%
<b>It protects the value of my vehicle</b>	41%	75%
<b>Washing is already part of my car maintenance routine</b>	52%	50%
<b>It makes me feel like I'm part of a special club</b>	36%	25%
<b>It is required by the car wash (they only offer a monthly subscription or unlimited wash program)</b>	20%	50%
<b>The car wash has multiple locations</b>	31%	50%
<b>It makes visiting the wash more convenient due to the dedicated member entry lane</b>	25%	75% a
<b>Other, please specify</b>	1%	0%

Both cohorts said they would join an unlimited washing program 'if it provided them a greater value'.

<b>What would make you want to join a monthly unlimited washing program/subscription?</b>	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Aware, but not a Member of a Monthly Unlimited Washing Program</b>	N= 151	N= 27
<b>If it provided me a greater value</b>	69%	85% <b>a</b>
<b>If I got a wider variety of services for the price</b>	37%	48%
<b>If it made me feel like I'm part of a special club</b>	19%	11%
<b>If it was required by the car wash</b>	15%	4%
<b>If the car wash had multiple locations</b>	37%	59% <b>A</b>
<b>If it allowed me to enter the car wash faster/ahead of others</b>	31% <b>b</b>	15%
<b>Other, please specify</b>	7%	0%



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## Sub-Segment Analysis: PRO Most Often versus DIY Most Often

Demographic Profile

Usage

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Loyalty Car Wash Programs

**Washing Vehicles with Safety Features**

PRO most often have more vehicles with high-tech safety features than DIY most often.

Does your vehicle have any high-tech safety features (i.e. anti-lock braking system, back-up camera, parking sensors)?	Pro Most Often A	DIY Most Often B
<b>Total</b>	N=1062	N=472
<b>Yes</b>	61% <b>B</b>	54%
<b>No</b>	39%	46% <b>A</b>

A majority of both cohorts had no concerns about damaging the safety features on their vehicle by washing at a car wash.

<b>Do you have any concerns about washing your vehicle at a car wash due to the safety features on your car?</b>	<b>Pro Most Often A</b>	<b>DIY Most Often B</b>
<b>Has High-Tech Safety Features</b>	N=653	N=256
<b>Yes</b>	19%	23%
<b>No</b>	81%	77%

PRO most often are more likely to wash their vehicle that has high-tech safety features at a PRO wash.

Does having high-tech safety features on your vehicle make you more or less likely to wash your vehicle at a car wash?	Pro Most Often A	DIY Most Often B
<b>Has High-Tech Safety Features</b>	N=653	N=256
<b>Bottom 2</b>	3%	16% A
<b>Much less likely</b>	1%	6% A
<b>Somewhat less likely</b>	2%	10% A
<b>Neither more nor less likely</b>	68%	71%
<b>Somewhat more likely</b>	17% B	9%
<b>Much more likely</b>	12% B	3%
<b>Top 2</b>	28% B	13%



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## Sub-segment Analysis: PRO Most Often versus NON Washers

*Readers Note: In this section of the report, we look at the differences between two distinct cohorts. 1) Respondents who have washed their vehicle at a professional car wash (PRO) most often in the past year; 2) Respondents who have not washed their (NON) in the past year.*

4% of respondents did not wash their vehicle in the past year.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2016</b>
<b>Total</b>	N= 1606
<b>Washed</b>	96%
<b>Did NOT Wash</b>	4%



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## Sub-segment Analysis: PRO Most Often versus NON Washers

### **Demographic Profile** Attitudes, Benefits & Barriers

# Gender

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Male</b>	44%	44%
<b>Female</b>	56%	56%

# Age

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>18-24</b>	14%	18%
<b>25-34</b>	19% <b>b</b>	11%
<b>35-44</b>	18% <b>B</b>	8%
<b>45-54</b>	19%	21%
<b>55-64</b>	15%	17%
<b>65+</b>	15%	26% <b>A</b>

# Household Income

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Under \$20,000</b>	17%	32% <b>A</b>
<b>\$20,000-\$29,999</b>	10%	19% <b>A</b>
<b>\$30,000-\$39,999</b>	9%	15% <b>a</b>
<b>\$40,000-\$49,999</b>	10% <b>b</b>	3%
<b>\$50,000-\$59,999</b>	8%	6%
<b>\$60,000-\$74,999</b>	10%	7%
<b>\$75,000-\$99,999</b>	12%	7%
<b>\$100,000-\$149,999</b>	13%	11%
<b>\$150,000 or over</b>	11% <b>B</b>	0%

# Marital Status

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Single</b>	29%	32%
<b>Living with someone but not married</b>	8%	4%
<b>Engaged to be married / Married / Domestic Partnership</b>	49%	44%
<b>Divorced / Widowed / Separated</b>	15%	21%

## Race or Ethnicity

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>White/Caucasian</b>	60%	72% <b>A</b>
<b>Spanish/Hispanic/Latino</b>	18% <b>b</b>	10%
<b>Black/African American</b>	13%	13%
<b>Asian</b>	5%	4%
<b>Pacific Islander</b>	0%	1% <b>a</b>
<b>Native American</b>	1%	0%
<b>Other</b>	2%	0%

# Education

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Did not complete high school</b>	2%	1%
<b>High school graduate or equivalent</b>	20%	22%
<b>Some college or trade school</b>	28%	33%
<b>College or trade school graduate</b>	37%	31%
<b>Post graduate</b>	13%	14%

# Employment

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Employed full-time</b>	45% <b>B</b>	24%
<b>Employed part-time</b>	10%	19% <b>A</b>
<b>Not currently employed</b>	5%	11% <b>A</b>
<b>Self-employed</b>	6%	7%
<b>Student</b>	5%	10%
<b>Homemaker</b>	8%	6%
<b>Retired</b>	19%	19%
<b>Other</b>	1%	4% <b>A</b>

# Regionality

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Northeast</b>	18%	14%
<b>South</b>	31%	39%
<b>Midwest</b>	22%	24%
<b>Southwest</b>	6%	6%
<b>West</b>	23%	18%

# Age of Vehicle

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Less than 1 year old</b>	9%	7%
<b>1-3 years' old</b>	27% <b>B</b>	13%
<b>4-5 years' old</b>	20% <b>b</b>	11%
<b>6-9 years' old</b>	18%	11%
<b>More than 10 years' old</b>	26%	58% <b>A</b>

## Driving Miles Per Year

	<b>PRO Most Often A</b>	<b>NON Washers B</b>
<b>Total</b>	N=1062	N=72
<b>Less than 2,500</b>	10%	25% <b>A</b>
<b>2,501-5,000</b>	15%	22% <b>a</b>
<b>5,001-10,000</b>	26%	19%
<b>10,001-15,000</b>	26%	21%
<b>15,001-25,000</b>	13% <b>B</b>	3%
<b>More than 25,000</b>	4% <b>b</b>	0%
<b>I don't know</b>	6%	10%



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## Sub-segment Analysis: PRO Most Often versus NON Washers

Demographic Profile  
**Attitudes, Benefits & Barriers**

NON washers agree significantly more that washing a vehicle is something they only do if they have the extra time or money.

Which statement do you most agree with?	PRO Most Often A	NON Washers B
<b>Total</b>	N=1062	N=72
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	68% B	15%
<b>Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me</b>	22%	21%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	10%	64% A

**NON Washers are much less likely to agree with the benefits of a PRO wash.**

Please indicate whether you agree or disagree with each of the following statements.	PRO Most Often A	NON Washers B
<b>Total</b>	N=1062	N=72
<b>Washing a car at a car wash is less work than washing a car at home</b>	92% B	82%
<b>Washing a car at a car wash is faster than washing a car at home</b>	91% B	82%
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	89% B	69%
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	81% B	63%
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	55%	51%
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	47% B	17%
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	64% B	32%
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	29% B	15%
<b>Washing a car at a car wash costs less than washing a car at home</b>	43% B	15%
<b>Washing at a car wash uses less water than washing a car at home</b>	70% B	39%

PRO most often are significantly more environmentally conscious than NON washers.

Which of the following statements do you agree with?	PRO Most Often A	NON Washers B
<b>Total</b>	N=1062	N=72
<b>I recycle</b>	83% B	68%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	46% B	18%
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	38% B	21%
<b>None of the above</b>	9%	26% A



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## Sub-Segment Analysis

*Readers Note: In this section of the report, we analyze the differences between each of four distinct cohorts from 2014 to 2016.*

Loyal: PRO Only (42%)  
Switchers: PRO + DIY (38%)  
Rejectors: DIY Only (16%)  
NON Washers (4%)

## Sub-segment Analysis: PRO Only, PRO & DIY, DIY Only

- Insights into how these three discreet cohorts have shifted in usage and attitudes the last two years will help ICA members better identify opportunities to drive incremental car wash count and profitability.
- The three cohorts are:
  - **PRO Only**
    - These are consumers who have washed their vehicle exclusively at a PRO wash during the past year. We refer to this cohort as **LOYAL** PRO car wash users.
    - These are consumers who offer varying degrees of opportunity to increase frequency of washing at a PRO wash.
  - **PRO + DIY**
    - These are consumers who have washed their vehicle at both a PRO wash and DIY during the past year. We refer to this cohort as **SWITCHERS**.
    - These are the consumers who offer opportunity to engender greater loyalty to PRO washes.
  - **DIY Only**
    - These are consumers who have washed their vehicle exclusively at home during the past year. We refer to this cohort as **REJECTORS**.
    - These are washers who represent the greatest challenge in converting to PRO consumers.



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## Loyal PRO Consumers: PRO Only

### Sub-Segment Analysis

*Readers Note: This sub-section of the report analyzes respondents who have washed their vehicle exclusively at a professional car wash in the past year (PRO Only) from 2014 to 2016.*

### **Demographic Profile**

Usage

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Those who only washed their vehicle at a PRO wash significantly decreased to 44%.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N= 1594	N= 1534
<b>PRO Only</b>	52% <b>B</b>	44%
<b>PRO + DIY</b>	31%	40% <b>A</b>
<b>DIY Only</b>	17%	16%

# Gender

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Male</b>	45%	41%
<b>Female</b>	55%	59%

# Age

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>18-24</b>	13%	13%
<b>25-34</b>	22% <b>B</b>	17%
<b>35-44</b>	19%	17%
<b>45-54</b>	15%	19% <b>A</b>
<b>55-64</b>	15%	15%
<b>65+</b>	15%	19% <b>A</b>

# Household Income

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Under \$20,000</b>	16%	21% <b>A</b>
<b>\$20,000-\$29,999</b>	12%	10%
<b>\$30,000-\$39,999</b>	11% <b>B</b>	8%
<b>\$40,000-\$49,999</b>	9%	10%
<b>\$50,000-\$59,999</b>	8%	7%
<b>\$60,000-\$74,999</b>	11%	9%
<b>\$75,000-\$99,999</b>	13% <b>b</b>	10%
<b>\$100,000-\$149,999</b>	11%	12%
<b>\$150,000 or over</b>	11%	12%

# Marital Status

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Single</b>	27%	29%
<b>Living with someone but not married</b>	9%	9%
<b>Engaged to be married/ Married/Domestic Partnership</b>	48%	45%
<b>Divorced/Widowed/Separated</b>	15%	17%

## Race or Ethnicity

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>White/Caucasian</b>	62%	60%
<b>Spanish/Hispanic/Latino</b>	17%	18%
<b>Black/African American</b>	14%	13%
<b>Asian</b>	3%	5% <sup>a</sup>
<b>Pacific Islander</b>	0%	0%
<b>Native American</b>	1%	2%
<b>Other</b>	3%	3%

# Education

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Did not complete high school</b>	2%	2%
<b>High school graduate or equivalent</b>	13%	19% <b>A</b>
<b>Some college or trade school</b>	24%	29% <b>A</b>
<b>College or trade school graduate</b>	37%	37%
<b>Post graduate</b>	24% <b>B</b>	13%

# Employment

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Employed full-time</b>	55% <b>B</b>	42%
<b>Employed part-time</b>	7%	11% <b>A</b>
<b>Not currently employed</b>	4%	4%
<b>Self-employed</b>	7%	6%
<b>Student</b>	5%	5%
<b>Homemaker</b>	4%	8% <b>A</b>
<b>Retired</b>	16%	22% <b>A</b>
<b>Other</b>	3% <b>B</b>	1%

# Regionality

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Northeast</b>	16%	17%
<b>South</b>	32%	33%
<b>Midwest</b>	23%	22%
<b>Southwest</b>	8% <b>B</b>	5%
<b>West</b>	21%	23%

# Age of Vehicle

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Less than 1 year old</b>	10%	9%
<b>1-3 years old</b>	22%	25%
<b>4-5 years old</b>	15%	20% <b>A</b>
<b>6-9 years old</b>	23% <b>B</b>	17%
<b>More than 10 years old</b>	30%	29%

# Driving Miles Per Year

	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=828	N=667
<b>Less than 2,500</b>	10%	10%
<b>2,501-5,000</b>	15%	16%
<b>5,001-10,000</b>	25%	27%
<b>10,001-15,000</b>	25%	24%
<b>15,001-25,000</b>	15% <b>B</b>	10%
<b>More than 25,000</b>	5%	5%
<b>I don't know</b>	5%	7%



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## Loyal PRO Consumers: PRO Only

Demographic Profile

**Usage**

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Usage of full-service and self-operated car washes significantly increased.

Which of the following have you done in the past year to wash your vehicle?	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Full</b>	41%	49% A
<b>Exterior</b>	39%	40%
<b>Stationary</b>	35%	35%
<b>Hand</b>	17%	20%
<b>Self</b>	22%	28% A

PRO Only consumers used full-service car washes significantly more often than they did in 2014.

Which ONE of the following do you do most often to wash your vehicle?	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Full</b>	30%	38% A
<b>Exterior</b>	28% b	24%
<b>Stationary</b>	22%	19%
<b>Hand</b>	7%	6%
<b>Self</b>	13%	12%



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## Loyal PRO Consumers: PRO Only

Demographic Profile

Usage

**Attitudes, Benefits & Barriers**

Online Car Wash Media Consumption

The belief that washing your vehicle is important and necessary significantly increased among PRO Only since 2014. Similarly, agreement that washing your vehicle is a discretionary purchase significantly decreased as well.

Which statement do you most agree with?	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	49%	63% A
<b>Washing a vehicle is a discretionary purchase, but something that I like to have done</b>	30% B	22%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	20% B	15%

Emotional and rational reasons for washing a vehicle at a car wash significantly increased in agreement among PRO Only since 2014. Most notably, 83% agree that they wash their vehicle at a PRO wash, because a clean vehicle makes them feel good.

How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>A clean vehicle makes me feel good</b>	71%	83% A
<b>I want the vehicle to look good for special occasions</b>	69%	71%
<b>Washing helps protect the value of my vehicle</b>	70%	78% A
<b>A clean vehicle is a good reflection on me</b>	64%	74% A
<b>A clean vehicle makes me feel proud</b>	64%	N/A
<b>I want to prevent my vehicle from rusting</b>	64%	74% A
<b>It saves time</b>	65%	73% A
<b>A clean vehicle makes me feel better about myself</b>	58%	N/A
<b>It's a treat to have my vehicle washed</b>	60%	64%
<b>When the weather is nice, I enjoy getting a car wash</b>	56%	52%
<b>It's part of my car maintenance routine</b>	52%	65% A

Cleanliness and price are still the most important aspects of a car wash for PRO Only, but all other aspects have become significantly more important as well.

How important are each of the following aspects of a car wash to you? Top 2 Boxes	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Cleanliness (the vehicle is clean, all dirt has been removed)</b>	84%	90% A
<b>Price (it is a good value)</b>	78%	84% A
<b>Shininess (the vehicle is shiny and bright)</b>	65%	72% A
<b>Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)</b>	67%	79% A
<b>Dryness (the vehicle is dry, there is no water or soap remaining)</b>	62%	75% A
<b>Speed (I can get in and out quickly)</b>	57%	73% A
<b>Hours of operation (the car wash is open when I want a wash)</b>	N/A	74%
<b>Human interaction (there is an employee who greets you and personally takes your payment)</b>	N/A	37%
<b>Self-service (a touch screen or pay station takes your payment)</b>	N/A	42%

All additional services significantly increased in importance from 2014. The most important additional service to PRO Only is having the wheels and rims cleaned (65%).

How important are each of the following additional services at a car wash? Top 2 Boxes	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Having the underbody of the vehicle cleaned</b>	45%	60% A
<b>Having the interior vacuumed for me</b>	46%	53% A
<b>Having a wax or paint protectant applied</b>	43%	60% A
<b>Having the wheels specially cleaned</b>	43%	N/A
<b>Having the vehicle hand towel dried</b>	36%	53% A
<b>Getting my tires dressed or shined</b>	36%	N/A
<b>Being able to vacuum the interior myself</b>	29%	44% A
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	27%	N/A
<b>Having a fragrance added to the interior</b>	21%	37% A
<b>Having the wheels and rims cleaned</b>	N/A	65%
<b>Having the tires shined</b>	N/A	51%
<b>Having the exterior polished</b>	N/A	55%
<b>Having the interior cleaned</b>	N/A	62%

PRO Only agree it is worth it to pay more for a variety of additional services, significantly more than they did in 2014. Only 11% felt it wasn't worthwhile to pay more for any additional services, a significant decrease from 2014 (16%).

Which of the following additional services at a car wash is WORTH PAYING MORE FOR?	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Having a wax or paint protectant applied</b>	44%	49% <b>a</b>
<b>Having the interior vacuumed for me</b>	47%	49%
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	44%	N/A
<b>Having the underbody of the vehicle cleaned</b>	33%	40% <b>A</b>
<b>Having the wheels specially cleaned</b>	29%	N/A
<b>Getting my tires dressed or shined</b>	25%	N/A
<b>Having the vehicle hand towel dried</b>	24%	30% <b>A</b>
<b>Being able to vacuum the interior myself</b>	13%	21% <b>A</b>
<b>Having a fragrance added to the interior</b>	11%	16% <b>A</b>
<b>Having the exterior polished</b>	N/A	39%
<b>Having the interior cleaned</b>	N/A	45%
<b>Having the wheels and rims cleaned</b>	N/A	35%
<b>Having the tires shined</b>	N/A	33%
<b>None of the above</b>	16% <b>B</b>	11%

PRO Only agree significantly more with the benefits of washing at PRO wash over washing at home.

Please indicate whether you agree or disagree with each of the following statements.	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Washing a car at a car wash is less work than washing a car at home</b>	93%	93%
<b>Washing a car at a car wash is faster than washing a car at home</b>	90%	93% A
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	88%	89%
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	76%	86% A
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	59%	75% A
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	54%	71% A
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	54%	69% A
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	34%	49% A
<b>Washing a car at a car wash costs less than washing a car at home</b>	32%	45% A
<b>Washing at a car wash uses less water than washing a car at home</b>	N/A	71%



Q: Please indicate whether you agree or disagree with each of the following statements.

PRO Only are more environmentally conscious than they were in 2014.

Which of the following statements do you agree with?	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>I recycle</b>	78%	83% A
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	36%	45% A
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	26%	36% A
<b>None of the above</b>	15% B	8%



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## Loyal PRO Consumers: PRO Only

Demographic Profile  
Usage  
Attitudes, Benefits & Barriers  
**Online Car Wash Media Consumption**

While significantly more PRO Only consumers received an online communication or offer from a car wash in 2016, only 15% received anything.

Have you received any online communications or offers from a car wash in the past year?	2014 PRO Only A	2016 PRO Only B
<b>Total</b>	N=828	N=667
<b>Yes</b>	10%	15% A
<b>No</b>	90% B	85%

Email has decreased slightly since 2014 while Facebook, Twitter, and car wash websites have become more prominent channels to receive communications or offers.

<b>Still thinking about the past year, how have you received online communications or offers from car washes?</b>	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=79	N=102
<b>Email</b>	43%	40%
<b>Facebook</b>	24%	35%
<b>Groupon</b>	14%	14%
<b>Car wash website</b>	16%	30% A
<b>LivingSocial</b>	13%	17%
<b>Banner ad on a website</b>	15%	12%
<b>Coupons.com</b>	13%	18%
<b>Other coupon app or website</b>	11%	6%
<b>Twitter</b>	9%	21% A
<b>I can't remember</b>	6%	2%
<b>Coupon bloggers</b>	3%	5%
<b>Search engine (Google/Yahoo/Bing)</b>	5%	18% A
<b>SmartSource.com</b>	3%	13% A
<b>Other (please specify)</b>	6%	12%

Email and Facebook are the most popular channels to redeem coupons or offers. However, fewer offers were redeemed through email in 2016.

<b>Have you used any coupons or promotional offers from any of the following in the past year?</b>	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=79	N=102
<b>Email</b>	41%	30%
<b>Facebook</b>	14%	28% A
<b>Groupon</b>	11% b	4%
<b>Car wash website</b>	15%	23%
<b>Coupons.com</b>	10%	10%
<b>LivingSocial</b>	6%	3%
<b>Coupon bloggers</b>	3%	3%
<b>Twitter</b>	5%	14% A
<b>SmartSource.com</b>	3%	4%
<b>Other coupon app or website</b>	3%	2%
<b>Banner ad on a website</b>	1%	6% a
<b>Search Engine (Google/Yahoo/Bing)</b>	1%	15% A
<b>Other (please specify)</b>	6%	8%
<b>I can't remember</b>	6% B	0%
<b>I have not used any coupons or promotional offers from car washes.</b>	N/A	18%

Q: Have you used any coupons or promotional offers from any of the following in the past year?



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## Switchers: PRO + DIY

*Readers Note: This sub-section of the report analyzes respondents who have washed their vehicle at both a professional car wash and at home (PRO + DIY) in the past year from 2014 to 2016.*

### **Demographic Profile**

Usage

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

The percentage of switchers has significantly increased in the past two years.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1594	N=1534
<b>PRO Only</b>	52% <b>B</b>	44%
<b>PRO + DIY</b>	31%	40% <b>A</b>
<b>DIY Only</b>	17%	16%

# Gender

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Male</b>	51%	54%
<b>Female</b>	49%	46%

# Age

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>18-24</b>	12%	13%
<b>25-34</b>	21%	21%
<b>35-44</b>	17%	20%
<b>45-54</b>	19%	20%
<b>55-64</b>	18%	16%
<b>65+</b>	14% <b>B</b>	10%

# Household Income

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Under \$20,000</b>	16% B	10%
<b>\$20,000-\$29,999</b>	11%	10%
<b>\$30,000-\$39,999</b>	9%	11%
<b>\$40,000-\$49,999</b>	8%	11% a
<b>\$50,000-\$59,999</b>	9%	9%
<b>\$60,000-\$74,999</b>	10%	11%
<b>\$75,000-\$99,999</b>	12%	16% a
<b>\$100,000-\$149,999</b>	15%	13%
<b>\$150,000 or over</b>	10%	9%

# Marital Status

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Single</b>	32% <b>b</b>	27%
<b>Living with someone but not married</b>	5%	7%
<b>Engaged to be married / Married / Domestic Partnership</b>	49%	55% <b>A</b>
<b>Divorced / Widowed / Separated</b>	13%	11%

# Race or Ethnicity

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>White/Caucasian</b>	69%	65%
<b>Spanish/Hispanic/Latino</b>	11%	16% <b>A</b>
<b>Black/African American</b>	12%	11%
<b>Asian</b>	4%	5%
<b>Pacific Islander</b>	0%	0%
<b>Native American</b>	2% <b>B</b>	0%
<b>Other</b>	2%	1%

# Education

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Did not complete high school</b>	1%	3% <b>A</b>
<b>High school graduate or equivalent</b>	12%	20% <b>A</b>
<b>Some college or trade school</b>	25%	28%
<b>College or trade school graduate</b>	41%	38%
<b>Post graduate</b>	21% <b>A</b>	12%

# Employment

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Employed full-time</b>	49%	49%
<b>Employed part-time</b>	12%	9%
<b>Not currently employed</b>	5%	6%
<b>Self-employed</b>	5%	6%
<b>Student</b>	8%	6%
<b>Homemaker</b>	5%	8% <b>A</b>
<b>Retired</b>	16%	15%
<b>Other</b>	1%	1%

# Regionality

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Northeast</b>	17%	17%
<b>South</b>	35%	33%
<b>Midwest</b>	21%	22%
<b>Southwest</b>	5%	6%
<b>West</b>	22%	21%

# Age of Vehicle

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Less than 1 year old</b>	6%	9% <b>a</b>
<b>1-3 years old</b>	23%	29% <b>A</b>
<b>4-5 years old</b>	16%	17%
<b>6-9 years old</b>	25% <b>B</b>	19%
<b>More than 10 years old</b>	30%	26%

# Driving Miles Per Year

	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Less than 2,500</b>	5%	9% <b>A</b>
<b>2,501-5,000</b>	15%	13%
<b>5,001-10,000</b>	26%	24%
<b>10,001-15,000</b>	26%	29%
<b>15,001-25,000</b>	17%	16%
<b>More than 25,000</b>	7% <b>B</b>	3%
<b>I don't know</b>	4%	6%



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## Switchers: PRO + DIY

Demographic Profile

**Usage**

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Usage of full-service, hand, and self-service car washes increased.

Which of the following have you done in the past year to wash your vehicle?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Full</b>	40%	45% <b>a</b>
<b>Exterior</b>	48%	48%
<b>Stationary</b>	47%	48%
<b>Hand</b>	22%	32% <b>A</b>
<b>Self</b>	47%	54% <b>A</b>
<b>DIY</b>	100%	100%

PRO + DIY used full-service washes significantly more often than they did in 2014.

Which ONE of the following do you do most often to wash your vehicle?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Full</b>	13%	17% A
<b>Exterior</b>	17%	15%
<b>Stationary</b>	14%	14%
<b>Hand</b>	2%	4% A
<b>Self</b>	18% b	14%
<b>DIY</b>	36%	36%



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## Switchers: PRO + DIY

Demographic Profile

Usage

**Attitudes, Benefits & Barriers**

Online Car Wash Media Consumption

Agreement that washing a vehicle is important and necessary has increased significantly since 2014.

Which statement do you most agree with?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	64%	73% A
<b>Washing a vehicle is a discretionary purchase, but something that I like to have done</b>	26% b	21%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	9% b	6%

The emotional and rational reasons for washing a vehicle at a PRO wash are significantly more important than two years ago.

<b>How much do you agree or disagree with each of the following statements? I use a car wash because: Top 2 Boxes</b>	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>A clean vehicle makes me feel good</b>	81%	91% <b>A</b>
<b>I want the vehicle to look good for special occasions</b>	79%	77%
<b>Washing helps protect the value of my vehicle</b>	75%	83% <b>A</b>
<b>A clean vehicle is a good reflection on me</b>	77%	81%
<b>A clean vehicle makes me feel proud</b>	73%	N/A
<b>I want to prevent my vehicle from rusting</b>	72%	81% <b>A</b>
<b>It saves time</b>	66%	78% <b>A</b>
<b>A clean vehicle makes me feel better about myself</b>	67%	N/A
<b>It's a treat to have my vehicle washed</b>	58%	73% <b>A</b>
<b>When the weather is nice, I enjoy getting a car wash</b>	63%	69% <b>A</b>
<b>It's part of my car maintenance routine</b>	60%	74% <b>A</b>

Cleanliness is especially important, but all aspects of a car wash increased in importance.

How important are each of the following aspects of a car wash to you? Top 2 Boxes	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Cleanliness (the vehicle is clean, all dirt has been removed)</b>	91%	95% A
<b>Dryness (the vehicle is dry, there is no water or soap remaining)</b>	67%	76% A
<b>Shininess (the vehicle is shiny and bright)</b>	71%	80% A
<b>Speed (I can get in and out quickly)</b>	59%	77% A
<b>Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)</b>	62%	82% A
<b>Price (it is a good value)</b>	85%	90% A
<b>Hours of operation (the car wash is open when I want a wash)</b>	N/A	72%
<b>Human interaction (there is an employee who greets you and personally takes your payment)</b>	N/A	30%
<b>Self-service (a touch screen or pay station takes your payment)</b>	N/A	47%

All additional services increased in importance to PRO + DIY since 2014. The most important additional service is having the wheels and rims cleaned.

How important are each of the following additional services at a car wash?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Having the underbody of the vehicle cleaned</b>	48%	63% A
<b>Having a wax or paint protectant applied</b>	44%	59% A
<b>Having the interior vacuumed for me</b>	38%	44% A
<b>Having the wheels specially cleaned</b>	41%	N/A
<b>Having the vehicle hand towel dried</b>	38%	46% A
<b>Getting my tires dressed or shined</b>	35%	N/A
<b>Being able to vacuum the interior myself</b>	39%	52% A
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	27%	N/A
<b>Having a fragrance added to the interior</b>	15%	33% A
<b>Having the wheels and rims cleaned</b>	N/A	68%
<b>Having the tires shined</b>	N/A	50%
<b>Having the exterior polished</b>	N/A	58%
<b>Having the interior cleaned</b>	N/A	58%

There are several additional car wash services PRO + DIY believe are worth paying more for, significantly more than they did in 2014.

<b>Which of the following additional services at a car wash is WORTH PAYING MORE FOR? Top 2 Boxes</b>	<b>2014 PRO and DIY A</b>	<b>2016 PRO and DIY B</b>
<b>Total</b>	N=491	N=615
<b>Having the underbody of the vehicle cleaned</b>	37%	45% A
<b>Having a wax or paint protectant applied</b>	49%	55% A
<b>Having the interior vacuumed for me</b>	37%	42% a
<b>Having the wheels specially cleaned</b>	35%	N/A
<b>Having the vehicle hand towel dried</b>	28%	31%
<b>Getting my tires dressed or shined</b>	28%	N/A
<b>Being able to vacuum the interior myself</b>	15%	22% A
<b>Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)</b>	45%	N/A
<b>Having a fragrance added to the interior</b>	12%	20% A
<b>Having the wheels and rims cleaned</b>	N/A	41%
<b>Having the tires shined</b>	N/A	30%
<b>Having the exterior polished</b>	N/A	42%
<b>Having the interior cleaned</b>	N/A	42%
<b>None of the above</b>	14%	12%

Agreement with the benefits of using a car wash over washing at home has significantly increased since 2014.

Please indicate whether you agree or disagree with each of the following statements.	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Washing a car at a car wash is less work than washing a car at home</b>	90%	90%
<b>Washing a car at a car wash is faster than washing a car at home</b>	87%	89%
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	71%	81% A
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	54%	67% A
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	36%	60% A
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	35%	56% A
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	22%	47% A
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	13%	35% A
<b>Washing a car at a car wash costs less than washing a car at home</b>	13%	32% A
<b>Washing a car at a car wash uses less water than washing a car at home</b>	N/A	61%

PRO + DIY consumers are more environmentally conscious when it comes to purchase decisions than they were in 2014.

Which of the following statements do you agree with?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>I recycle</b>	85%	84%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	42%	46%
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	32%	41% A
<b>None of the above</b>	12%	11%



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## Switchers: PRO + DIY

Demographic Profile

Usage

Attitudes, Benefits & Barriers

**Online Car Wash Media Consumption**

Only 11% of PRO + DIY received an offer from a car wash in the past year.

Have you received any online communications or offers from a car wash in the past year?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=491	N=615
<b>Yes</b>	6%	11% <b>A</b>
<b>No</b>	94% <b>B</b>	89%

Email is still the primary channel to receive car wash communications. Facebook Twitter, and car wash websites are becoming more prominent channels to receive communications for PRO + DIY.

Still thinking about the past year, how have you received online communications or offers from car washes?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=31	N=68
<b>Email</b>	65% <b>b</b>	47%
<b>Facebook</b>	13%	43% <b>A</b>
<b>Car wash website</b>	3%	41% <b>A</b>
<b>Groupon</b>	23%	24%
<b>LivingSocial</b>	10%	15%
<b>Coupons.com</b>	6%	21% <b>A</b>
<b>Banner ad on a website</b>	0%	18% <b>A</b>
<b>I can't remember</b>	6%	1%
<b>Twitter</b>	0%	32% <b>A</b>
<b>Other coupon app or website</b>	0%	4% <b>a</b>
<b>Coupon bloggers</b>	6%	16%
<b>Search engine (Google/Yahoo/Bing)</b>	0%	29% <b>A</b>
<b>SmartSource.com</b>	3%	18% <b>A</b>
<b>Other (please specify)</b>	0%	15% <b>A</b>

Significantly fewer coupons or offers were redeemed via email than in 2014. Many other channels saw significant growth in the number of offers redeemed.

Have you used any coupons or promotional offers from any of the following in the past year?	2014 PRO and DIY A	2016 PRO and DIY B
<b>Total</b>	N=31	N=68
<b>Email</b>	65% B	37%
<b>Facebook</b>	13%	29% a
<b>Groupon</b>	19%	15%
<b>Car wash website</b>	0%	34% A
<b>I can't remember</b>	6%	1%
<b>Coupons.com</b>	3%	13% a
<b>Coupon bloggers</b>	3%	6%
<b>LivingSocial</b>	0%	10% A
<b>Twitter</b>	0%	24% A
<b>SmartSource.com</b>	0%	15% A
<b>Other coupon app or website</b>	0%	1%
<b>Search Engine (Google/Yahoo/Bing)</b>	0%	19% A
<b>Banner ad on a website</b>	0%	9% A
<b>Other (please specify)</b>	0%	6% A
<b>I have not used any coupons or promotional offers from car washes.</b>	N/A	16%



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## Rejectors: DIY Only

*Readers Note: This sub-section of the report analyzes respondents who have washed their vehicle exclusively at home the past year (DIY Only) from 2014 to 2016.*

### **Demographic Profile**

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Those who only washed their vehicle at home dropped to 16%, but did not decrease significantly from 2014.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1594	N=1534
<b>PRO Only</b>	52% <b>B</b>	44%
<b>PRO + DIY</b>	31%	40% <b>A</b>
<b>DIY Only</b>	17%	16%

# Gender

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Male</b>	52%	52%
<b>Female</b>	48%	48%

# Age

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>18-24</b>	26% <b>B</b>	12%
<b>25-34</b>	11%	11%
<b>35-44</b>	11%	14%
<b>45-54</b>	15%	22% <b>A</b>
<b>55-64</b>	13%	20% <b>A</b>
<b>65+</b>	24%	21%

# Household Income

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Under \$20,000</b>	27%	28%
<b>\$20,000-\$29,999</b>	15%	13%
<b>\$30,000-\$39,999</b>	8%	10%
<b>\$40,000-\$49,999</b>	11%	8%
<b>\$50,000-\$59,999</b>	8%	7%
<b>\$60,000-\$74,999</b>	7%	8%
<b>\$75,000-\$99,999</b>	7%	7%
<b>\$100,000-\$149,999</b>	7%	10%
<b>\$150,000 or over</b>	9%	9%

# Marital Status

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Single</b>	34%	33%
<b>Living with someone but not married</b>	6%	6%
<b>Engaged to be married / Married / Domestic Partnership</b>	49%	52%
<b>Divorced / Widowed / Separated</b>	11%	9%

# Race or Ethnicity

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>White/Caucasian</b>	74% <b>b</b>	67%
<b>Spanish/Hispanic/Latino</b>	8%	13%
<b>Black/African American</b>	9%	6%
<b>Asian</b>	6%	4%
<b>Pacific Islander</b>	0%	0%
<b>Native American</b>	2%	1%
<b>Other</b>	0%	8% <b>A</b>

# Education

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Did not complete high school</b>	1%	8% <b>A</b>
<b>High school graduate or equivalent</b>	17%	19%
<b>Some college or trade school</b>	32% <b>b</b>	25%
<b>College or trade school graduate</b>	31%	36%
<b>Post graduate</b>	19%	13% <b>A</b>

# Employment

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Employed full-time</b>	30%	27%
<b>Employed part-time</b>	13%	9%
<b>Not currently employed</b>	8%	12%
<b>Self-employed</b>	3%	6% <b>a</b>
<b>Student</b>	16% <b>A</b>	6%
<b>Homemaker</b>	3%	11% <b>A</b>
<b>Retired</b>	24%	27%
<b>Other</b>	3%	3%

# Regionality

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Northeast</b>	11%	21% <b>A</b>
<b>South</b>	45%	39%
<b>Midwest</b>	13%	11%
<b>Southwest</b>	3%	5%
<b>West</b>	28%	25%

# Age of Vehicle

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Less than 1 year old</b>	5%	9% <b>a</b>
<b>1-3 years old</b>	14%	19%
<b>4-5 years old</b>	8%	12%
<b>6-9 years old</b>	25% <b>B</b>	15%
<b>More than 10 years old</b>	47%	45%

# Driving Miles Per Year

	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Less than 2,500</b>	13%	20% <b>A</b>
<b>2,501-5,000</b>	13%	14%
<b>5,001-10,000</b>	24%	25%
<b>10,001-15,000</b>	26% <b>B</b>	17%
<b>15,001-25,000</b>	11%	10%
<b>More than 25,000</b>	4%	4%
<b>I don't know</b>	9%	8%



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## Rejectors: DIY Only

Demographic Profile  
**Attitudes, Benefits & Barriers**  
Online Car Wash Media Consumption

DIY Only agree significantly more that washing a vehicle is a discretionary purchase while significantly less agree that washing a vehicle is not important.

Which statement do you most agree with?	2014 DIY Only A	2016 DIY Only B
<b>Total</b>	N=275	N=252
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	58%	60%
<b>Washing a vehicle is a discretionary purchase, but something that I like to have done</b>	15%	23% <b>A</b>
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	27% <b>B</b>	17%

There were no significant changes in attitudes among DIY Only consumers from 2014 to 2016 regarding the benefits of using a PRO wash.

Please indicate whether you agree or disagree with each of the following statements.	2014 DIY Only A	2016 DIY Only B
<b>Total</b>	N=275	N=252
<b>Washing a car at a car wash is less work than washing a car at home</b>	76%	77%
<b>Washing a car at a car wash is faster than washing a car at home</b>	68%	65%
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	45%	43%
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	31%	33%
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	23%	25%
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	16%	19%
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	14%	16%
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	11%	13%
<b>Washing a car at a car wash costs less than washing a car at home</b>	11%	14%
<b>Washing at a car wash uses less water than washing a car at home</b>	N/A	32%

There were slight, positive shifts in environmental consciousness among DIY Only consumers from 2014.

<b>Which of the following statements do you agree with?</b>	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>I recycle</b>	82%	86%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	33%	34%
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	32%	37%
<b>None of the above</b>	15% <b>b</b>	10%



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## Rejectors: DIY Only

Demographic Profile

Usage

Attitudes, Benefits & Barriers

**Online Car Wash Media Consumption**

Only 4% of DIY Only received any type of online communication or offer from a car wash in the past year.

<b>Have you received any online communications or offers from a car wash in the past year?</b>	<b>2014 DIY Only A</b>	<b>2016 DIY Only B</b>
<b>Total</b>	N=275	N=252
<b>Yes</b>	3%	4%
<b>No</b>	97%	96%



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## NON Washers

*Readers Note: This sub-section of the report analyzes those respondents who have not washed their vehicle in the past year (NON) from 2014 to 2016.*

### **Demographic Profile**

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Only 4% did not wash their vehicle in the past year.

<b>Which of the following have you done in the past year to wash your vehicle?</b>	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Washed</b>	95%	96%
<b>Did Not Wash</b>	5%	4%

# Gender

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Male</b>	56%	44%
<b>Female</b>	44%	56%

# Age

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>18-24</b>	23%	18%
<b>25-34</b>	31% <b>B</b>	11%
<b>35-44</b>	17% <b>b</b>	8%
<b>45-54</b>	20%	21%
<b>55-64</b>	4%	17% <b>A</b>
<b>65+</b>	6%	26% <b>A</b>

# Household Income

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Under \$20,000</b>	22%	32%
<b>\$20,000-\$29,999</b>	9%	19% <b>a</b>
<b>\$30,000-\$39,999</b>	21%	15%
<b>\$40,000-\$49,999</b>	7%	3%
<b>\$50,000-\$59,999</b>	6%	6%
<b>\$60,000-\$74,999</b>	7%	7%
<b>\$75,000-\$99,999</b>	15%	7%
<b>\$100,000-\$149,999</b>	7%	11%
<b>\$150,000 or over</b>	6% <b>A</b>	0%

# Marital Status

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Single</b>	56% <b>B</b>	32%
<b>Living with someone but not married</b>	1%	4%
<b>Engaged to be married/Married/Domestic Partnership</b>	40%	44%
<b>Divorced/Widowed/Separated</b>	4%	21% <b>A</b>

## Race or Ethnicity

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>White/Caucasian</b>	52%	72% <b>A</b>
<b>Spanish/Hispanic/Latino</b>	26% <b>B</b>	10%
<b>Black/African American</b>	9%	13%
<b>Asian</b>	4%	4%
<b>Pacific Islander</b>	0%	1%
<b>Native American</b>	0%	0%
<b>Other</b>	10% <b>A</b>	0%

# Education

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Did not complete high school</b>	0%	1%
<b>High school graduate or equivalent</b>	9%	22% <b>A</b>
<b>Some college or trade school</b>	27%	33%
<b>College or trade school graduate</b>	37%	31%
<b>Post graduate</b>	27% <b>B</b>	14%

# Employment

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Employed full-time</b>	63% <b>B</b>	24%
<b>Employed part-time</b>	14%	19%
<b>Not currently employed</b>	2%	11% <b>A</b>
<b>Self-employed</b>	1%	7% <b>a</b>
<b>Student</b>	12%	10%
<b>Homemaker</b>	1%	6% <b>a</b>
<b>Retired</b>	6%	19% <b>A</b>
<b>Other</b>	0%	4% <b>a</b>

# Regionality

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Northeast</b>	20%	14%
<b>South</b>	46%	39%
<b>Midwest</b>	17%	24%
<b>Southwest</b>	4%	6%
<b>West</b>	14%	18%

# Age of Vehicle

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Less than 1 year old</b>	10%	7%
<b>1-3 years old</b>	7%	13%
<b>4-5 years old</b>	9%	11%
<b>6-9 years old</b>	37% <b>B</b>	11%
<b>More than 10 years old</b>	37%	58% <b>A</b>

## Driving Miles Per Year

	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Less than 2,500</b>	16%	25%
<b>2,501-5,000</b>	25%	22%
<b>5,001-10,000</b>	25%	19%
<b>10,001-15,000</b>	12%	21%
<b>15,001-25,000</b>	11% <b>B</b>	3%
<b>More than 25,000</b>	4% <b>b</b>	0%
<b>I don't know</b>	9%	10%



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## NON Washers: NON Washers

Demographic Profile  
**Attitudes, Benefits & Barriers**  
Online Car Wash Media Consumption

More NON washers agree that washing their vehicle is a discretionary purchase. However, fewer NON washers agree with the statement that washing their vehicle is not important or something they are only likely to do if they have extra money and/or time.

<b>Which statement do you most agree with?</b>	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Washing a vehicle is an important and necessary part of routine maintenance</b>	11%	15%
<b>Washing a vehicle is a discretionary purchase, but something that I like to have done</b>	15%	21%
<b>Washing a vehicle is not that important and something I do only if I have the extra money and/or time</b>	74%	64%

Agreement with the benefits of washing your vehicle at a PRO wash over washing your vehicle at home slightly increased among NON washers, but not significantly.

Please indicate whether you agree or disagree with each of the following statements.	2014 NON Washers A	2016 NON Washers B
<b>Total</b>	N=81	N=72
<b>Washing a car at a car wash is less work than washing a car at home</b>	91%	82%
<b>Washing a car at a car wash is faster than washing a car at home</b>	88%	82%
<b>Washing a car at a car wash is more convenient than washing a car at home</b>	64%	69%
<b>Washing a car at a car wash is more enjoyable than washing a car at home</b>	58%	63%
<b>Washing a car at a car wash provides a better overall quality of wash than washing a car at home</b>	51%	53%
<b>Washing a car at a car wash is safer for the environment than washing a car at home</b>	26%	28%
<b>Washing a car at a car wash is a better overall value than washing a car at home</b>	25%	32%
<b>Washing a car at a car wash is safer for the car than washing a car at home</b>	15%	17%
<b>Washing a car at a car wash costs less than washing a car at home</b>	6%	15% <sup>a</sup>

Cost is now the number one reason for not using a PRO wash among NON washers. Apathy dropped significantly as a reason since two years ago.

Which of the following factors influenced your decision to NOT wash your vehicle at a car wash?	2014 NON Washers A	2016 NON Washers B
<b>Total</b>	N=81	N=72
<b>Having a clean car isn't that important to me</b>	49% B	32%
<b>The vehicle will just get dirty again quickly after being washed</b>	41%	29%
<b>Costs too much</b>	35%	42%
<b>Takes too much time</b>	32%	32%
<b>The vehicle is older</b>	16%	28% a
<b>Concern that the weather will be bad after I wash the vehicle and it will get dirty</b>	16% B	6%
<b>Location is not convenient</b>	12%	10%
<b>Worry about damaging the car</b>	11%	7%
<b>No coupons or discount offers</b>	10%	17%
<b>I don't think car washes are safe for the environment</b>	10%	11%
<b>Lack of confidence that the car wash would do a good job</b>	5%	6%
<b>Concerns about the equipment used at the car wash</b>	2%	1%
<b>The car wash was not attractive and clean</b>	1%	3%
<b>No gas station at the car wash</b>	1%	0%

Q: Which of the following factors influenced your decision to NOT wash your vehicle at a car wash? (5 point scale; Influence completely/Influence very much).

While NON Washers are less environmentally conscious than washers, they have become slightly more so since 2014.

Which of the following statements do you agree with?	2014 NON Washers A	2016 NON Washers B
<b>Total</b>	N=81	N=72
<b>I recycle</b>	68%	68%
<b>I purchase environmentally friendly products, even if they cost a bit more</b>	16%	18%
<b>It's important that I understand the carbon footprint of my purchase decisions</b>	9%	21% A
<b>None of the above</b>	30%	26%



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## NON Washers: NON Washers

Demographic Profile  
Attitudes, Benefits & Barriers  
**Online Car Wash Media Consumption**

Only 1% of NON Washers received any online communications or offers from a car wash in the past year.

<b>Have you received any online communications or offers from a car wash in the past year?</b>	<b>2014 NON Washers A</b>	<b>2016 NON Washers B</b>
<b>Total</b>	N=81	N=72
<b>Yes</b>	4%	1%
<b>No</b>	96%	99%



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## Sub-segment Analysis: PRO Only Heavy, Medium, Light Consumers

*Readers Note: This section of the report analyzes the opportunity to increase frequency of washing among respondents who wash their vehicle exclusively at a professional car wash (PRO Only). We analyze three distinct cohorts of these loyal PRO Only consumers (heavy, medium, and light consumers). Definitions of heavy, medium, and light PRO Only consumers are provided on the following pages of the report.*

## Demographic Profile Usage & Attitudes

## PRO Only Consumers: Heavy vs. Medium vs. Light Segments Defined

### Heavy

- Wash at a PRO Wash a few times each month or more often

### Medium

- Wash at a PRO Wash every couple of months (2016 addition: or once a month)

### Light

- Wash at a PRO Wash every six months or less often

Among respondents who washed exclusively at a PRO wash in 2016, 24% were heavy users; 56% medium users (a significant increase); 20% light users.

<b>PRO Only Consumers: Reported Frequency of Usage</b>	<b>2014 PRO Only A</b>	<b>2016 PRO Only B</b>
<b>Total</b>	N=829	N=667
<b>Heavy</b>	28% <b>b</b>	24%
<b>Medium</b>	47%	56% <b>A</b>
<b>Light</b>	25% <b>B</b>	20%



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## Sub-Segment Analysis: PRO Only Heavy Consumers

*Readers Note: This sub-section of the report analyzes comparative data of PRO Only Heavy consumers from 2014 to 2016. PRO Only Heavy respondents are those who have washed their vehicle exclusively at a professional car wash in the past year (PRO Only) and do so a few times each month or more often.*

### **Demographic Profile** Usage & Attitudes

# Gender

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Male</b>	50% <b>B</b>	40%
<b>Female</b>	50%	60% <b>A</b>

# Age

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>18-24</b>	12%	14%
<b>25-34</b>	19%	20%
<b>35-44</b>	19%	20%
<b>45-54</b>	14%	16%
<b>55-64</b>	21%	16%
<b>65+</b>	14%	13%

# Household Income

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Under \$20,000</b>	9%	13%
<b>\$20,000-\$29,999</b>	12%	11%
<b>\$30,000-\$39,999</b>	10%	7%
<b>\$40,000-\$49,999</b>	13%	10%
<b>\$50,000-\$59,999</b>	7%	9%
<b>\$60,000-\$74,999</b>	11%	11%
<b>\$75,000-\$99,999</b>	11%	9%
<b>\$100,000-\$149,999</b>	13%	10%
<b>\$150,000 or over</b>	13%	20% <b>a</b>

# Marital Status

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Single</b>	26%	25%
<b>Living with someone but not married</b>	9%	12%
<b>Engaged to be married / Married / Domestic Partnership</b>	47%	43%
<b>Divorced / Widowed / Separated</b>	17%	19%

# Race or Ethnicity

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>White/Caucasian</b>	50%	47%
<b>Spanish/Hispanic/Latino</b>	20%	28% <b>a</b>
<b>Black/African American</b>	22%	17%
<b>Asian</b>	3%	2%
<b>Pacific Islander</b>	0%	1%
<b>Native American</b>	2%	1%
<b>Other</b>	3%	5%

# Education

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Did not complete high school</b>	4% <b>B</b>	1%
<b>High school graduate or equivalent</b>	13%	18%
<b>Some college or trade school</b>	30% <b>b</b>	22%
<b>College or trade school graduate</b>	39%	45%
<b>Post graduate</b>	15%	14%

# Employment

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Employed full-time</b>	60%	55%
<b>Employed part-time</b>	5%	14% <b>A</b>
<b>Not currently employed</b>	3%	1%
<b>Self-employed</b>	4%	5%
<b>Student</b>	1%	4% <b>a</b>
<b>Homemaker</b>	3%	6%
<b>Retired</b>	18%	16%
<b>Other</b>	5% <b>B</b>	0%

# Regionality

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Northeast</b>	13%	13%
<b>South</b>	29%	32%
<b>Midwest</b>	24%	20%
<b>Southwest</b>	10%	6%
<b>West</b>	24%	29%

# Age of Vehicle

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Less than 1 year old</b>	14%	10%
<b>1-3 years old</b>	29%	32%
<b>4-5 years old</b>	18%	27% <b>A</b>
<b>6-9 years old</b>	16%	14%
<b>More than 10 years old</b>	23%	17%

# Driving Miles Per Year

	<b>2014 PRO Only Heavy A</b>	<b>2016 PRO Only Heavy B</b>
<b>Total</b>	N=228	N=161
<b>Less than 2,500</b>	10% <b>B</b>	3%
<b>2,501-5,000</b>	11%	11%
<b>5,001-10,000</b>	23%	25%
<b>10,001-15,000</b>	27%	30%
<b>15,001-25,000</b>	19%	14%
<b>More than 25,000</b>	5%	13% <b>A</b>
<b>I don't know</b>	6%	4%



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## Sub-Segment Analysis: PRO Only Heavy Consumers

Demographic Profile  
**Usage & Attitudes**

## Statistically significant differences from 2014 to 2016: PRO Only Heavy Consumers

- PRO Only Heavy are significantly more likely to have used a full-service car wash than they did two years ago. They are significantly less likely to have used an automatic car wash since 2014.
- PRO Only Heavy agree significantly more than in 2014 that:
  - Washing a vehicle is an important and necessary part of routine maintenance
  - They purchase environmentally friendly products and think it is important to understand the carbon footprint of their purchase decisions
  - They use a car wash, because it does a better job than they can do themselves, costs less, is safe for the environment, is convenient while doing other errands, and a fun family activity
  - More likely to be a member of a frequent washer club
  - Dryness, speed, and convenience are important aspects of a car wash
  - Additional services that are important and worth paying more for include having the interior vacuumed for me, being able to vacuum the interior myself, having the underbody of the vehicle cleaned, having the vehicle hand towel dried, and having a fragrance added to the interior. Additional services that are important include having a wax or paint protectant applied.
- PRO Only Heavy agree significantly less than in 2014 that:
  - Washing a vehicle is an important and necessary part of routine maintenance

## Statistically significant differences from 2014 to 2016: PRO Only Heavy Consumers (continued)

- PRO Only Heavy believe significantly more so than they did two years ago that compared to washing a vehicle at home, car washes are:
  - Safer for the environment
  - More enjoyable
  - Safer for the vehicle
  - Provides a better overall quality of wash
  - A better overall value
  - Costs less



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## Sub-Segment Analysis: PRO Only Medium Consumers

*Readers Note: This sub-section of the report analyzes comparative data of PRO Only Medium consumers from 2014 to 2016. PRO Only Medium respondents are those who have washed their vehicle exclusively at a professional car wash in the past year (PRO Only) and do so every couple of months.*

### **Demographic Profile** Attitudes & Usage

# Gender

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Male</b>	42%	43%
<b>Female</b>	58%	56%

# Age

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>18-24</b>	9%	12%
<b>25-34</b>	23% <b>B</b>	16%
<b>35-44</b>	18%	14%
<b>45-54</b>	19%	21%
<b>55-64</b>	16%	17%
<b>65+</b>	15%	19%

# Household Income

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Under \$20,000</b>	15%	21% <b>A</b>
<b>\$20,000-\$29,999</b>	12%	10%
<b>\$30,000-\$39,999</b>	7%	8%
<b>\$40,000-\$49,999</b>	5%	8% <b>a</b>
<b>\$50,000-\$59,999</b>	8%	7%
<b>\$60,000-\$74,999</b>	14% <b>b</b>	10%
<b>\$75,000-\$99,999</b>	15%	12%
<b>\$100,000-\$149,999</b>	12%	12%
<b>\$150,000 or over</b>	12%	12%

# Marital Status

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Single</b>	25%	27%
<b>Living with someone but not married</b>	9%	9%
<b>Engaged to be married/Married/Domestic Partnership</b>	50%	48%
<b>Divorced/Widowed/Separated</b>	16%	16%

## Race or Ethnicity

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>White/Caucasian</b>	66%	62%
<b>Spanish/Hispanic/Latino</b>	17%	13%
<b>Black/African American</b>	11%	13%
<b>Asian</b>	3%	7% <b>A</b>
<b>Pacific Islander</b>	0%	0%
<b>Native American</b>	1%	3% <b>A</b>
<b>Other</b>	1%	3% <b>A</b>

# Education

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Did not complete high school</b>	1%	1%
<b>High school graduate or equivalent</b>	13%	18% <b>a</b>
<b>Some college or trade school</b>	20%	34% <b>A</b>
<b>College or trade school graduate</b>	35%	35%
<b>Post graduate</b>	32% <b>B</b>	12%

# Employment

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Employed full-time</b>	55% <b>B</b>	39%
<b>Employed part-time</b>	8%	10%
<b>Not currently employed</b>	2%	4%
<b>Self-employed</b>	8%	8%
<b>Student</b>	5%	5%
<b>Homemaker</b>	5%	9% <b>A</b>
<b>Retired</b>	16%	24% <b>A</b>
<b>Other</b>	2%	1%

# Regionality

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Northeast</b>	16%	17%
<b>South</b>	35%	31%
<b>Midwest</b>	24%	23%
<b>Southwest</b>	7%	5%
<b>West</b>	18%	24% <b>A</b>

# Age of Vehicle

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Less than 1 year old</b>	9%	10%
<b>1-3 years old</b>	22%	24%
<b>4-5 years old</b>	14%	17%
<b>6-9 years old</b>	24% <b>B</b>	16%
<b>More than 10 years old</b>	30%	32%

# Driving Miles Per Year

	<b>2014 PRO Only Medium A</b>	<b>2016 PRO Only Medium B</b>
<b>Total</b>	N=391	N=373
<b>Less than 2,500</b>	9%	11%
<b>2,501-5,000</b>	14%	17%
<b>5,001-10,000</b>	25%	28%
<b>10,001-15,000</b>	25%	24%
<b>15,001-25,000</b>	16% <b>B</b>	11%
<b>More than 25,000</b>	5% <b>B</b>	2%
<b>I don't know</b>	6%	6%



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## Sub-Segment Analysis: PRO Only Medium Consumers

Demographic Profile  
**Usage & Attitudes**

## Statistically significant differences from 2014 to 2016: PRO Only Medium Consumers

- PRO Only Medium Consumers agree significantly more that:
  - Washing a vehicle is an important and necessary part of routine maintenance
  - They think it's important to understand the carbon footprint of their purchase decisions
  - They don't enjoy washing their vehicle themselves, a clean vehicle makes them feel good, and a clean vehicle is a good reflection on them
  - A car wash does a better job than they can do themselves and costs less
  - It's a treat to have my vehicle washed, it helps protect the value of my vehicle, prevents rusting, part of my routine maintenance, and is safer for the environment
  - More likely to be a member of a frequent washer club
  - Dryness, shininess, speed, and convenience are important aspects of a car wash
  - Additional services that are important include having the interior vacuumed, having the underbody of the vehicle cleaned, having a wax or paint protectant applied, having the vehicle hand towel dried, and having a fragrance added to the interior. Additional services that are worth paying more for include being able to vacuum the interior myself.
- PRO Only Medium Consumers agree significantly less that:
  - Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me

## Statistically significant differences from 2014 to 2016: PRO Only Medium Consumers (continued)

- PRO Only Medium believe significantly more so than they did two years ago that compared to washing a vehicle at home, car washes are:
  - Safer for the environment
  - More enjoyable
  - Provides a better overall quality of wash
  - A better overall value
  - Costs less



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## Sub-Segment Analysis: PRO Only Light Consumers

*Readers Note: This sub-section of the report analyzes comparative data of PRO Only Light Consumers from 2014 to 2016. PRO Only Light respondents are those who have washed their vehicle exclusively at a professional car wash in the past year (PRO Only) and do so every six months or less often.*

### **Demographic Profile** Usage & Attitudes

# Gender

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light A</b>
<b>Total</b>	N=210	N=133
<b>Male</b>	43%	35%
<b>Female</b>	57%	65%

# Age

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>18-24</b>	23% <b>b</b>	15%
<b>25-34</b>	22%	17%
<b>35-44</b>	22%	18%
<b>45-54</b>	9%	17% <b>A</b>
<b>55-64</b>	7%	8%
<b>65+</b>	16%	25% <b>A</b>

# Household Income

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Under \$20,000</b>	23%	31%
<b>\$20,000-\$29,999</b>	11%	11%
<b>\$30,000-\$39,999</b>	17%	11%
<b>\$40,000-\$49,999</b>	11%	15%
<b>\$50,000-\$59,999</b>	9%	5%
<b>\$60,000-\$74,999</b>	6%	6%
<b>\$75,000-\$99,999</b>	10%	8%
<b>\$100,000-\$149,999</b>	7%	11%
<b>\$150,000 or over</b>	7%	4%

# Marital Status

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Single</b>	32%	39%
<b>Living with someone but not married</b>	10% <b>b</b>	5%
<b>Engaged to be married / Married / Domestic Partnership</b>	46%	38%
<b>Divorced / Widowed / Separated</b>	12%	19% <b>a</b>

# Race or Ethnicity

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>White/Caucasian</b>	68%	67%
<b>Spanish/Hispanic/Latino</b>	11%	20% <b>A</b>
<b>Black/African American</b>	11%	9%
<b>Asian</b>	3%	2%
<b>Pacific Islander</b>	0%	1%
<b>Native American</b>	0%	1%
<b>Other</b>	7% <b>B</b>	0%

# Education

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Did not complete high school</b>	2%	8% <b>A</b>
<b>High school graduate or equivalent</b>	12%	23% <b>A</b>
<b>Some college or trade school</b>	25%	23%
<b>College or trade school graduate</b>	40% <b>b</b>	31%
<b>Post graduate</b>	20%	15%

# Employment

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Employed full-time</b>	49% <b>B</b>	36%
<b>Employed part-time</b>	9%	11%
<b>Not currently employed</b>	7%	9%
<b>Self-employed</b>	7% <b>B</b>	2%
<b>Student</b>	10%	8%
<b>Homemaker</b>	2%	8% <b>A</b>
<b>Retired</b>	14%	24% <b>A</b>
<b>Other</b>	2%	4%

# Regionality

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Northeast</b>	20%	24%
<b>South</b>	30%	38%
<b>Midwest</b>	22%	20%
<b>Southwest</b>	5%	5%
<b>West</b>	23% <b>B</b>	13%

# Age of Vehicle

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Less than 1 year old</b>	6%	5%
<b>1-3 years old</b>	15%	20%
<b>4-5 years old</b>	13%	19%
<b>6-9 years old</b>	30%	24%
<b>More than 10 years old</b>	37%	32%

# Driving Miles Per Year

	<b>2014 PRO Only Light A</b>	<b>2016 PRO Only Light B</b>
<b>Total</b>	N=210	N=133
<b>Less than 2,500</b>	13%	16%
<b>2,501-5,000</b>	20%	22%
<b>5,001-10,000</b>	27%	27%
<b>10,001-15,000</b>	22%	17%
<b>15,001-25,000</b>	10% <b>b</b>	5%
<b>More than 25,000</b>	4%	3%
<b>I don't know</b>	3%	11% <b>A</b>



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## Sub-Segment Analysis: PRO Only Light Consumers

Demographic Profile  
**Usage & Attitudes**

## Statistically significant differences from 2014 to 2016: PRO Only Light Consumers

- PRO Only Light are significantly more likely to have used a self-service car wash than they did two years ago.
- PRO Only Light agree significantly more than in 2014 that:
  - They purchase environmentally friendly products.
  - They don't enjoy washing their vehicle themselves, a clean vehicle makes them feel good, and is a good reflection on themselves.
  - A car wash does a better job than they can do themselves, saves time and money.
  - It is safer for the environment, prevents rusting, and it's convenient to do while buying gas.
  - Additional services that are significantly more important include being able to vacuum the interior themselves, having the underbody of the vehicle cleaned, having a wax or paint protectant applied, and having the vehicle hand towel dried. Additional services that are significantly worth paying more for include being able to vacuum the interior myself.
  - Cleanliness, dryness, and price are significantly more important aspects of a car wash
- PRO Only Light agree significantly less that:
  - Washing a vehicle is not that important and something I do only if I have the extra money and/or time

## Statistically significant differences from 2014 to 2016: PRO Only Light Consumers (continued)

- PRO Only Light believe significantly more so than they did two years ago that compared to washing a vehicle at home, car washes are:
  - Safer for the environment
  - Safer for the vehicle
  - A better overall value
  - Costs less
  - Faster
  - More convenient



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## Detailed Findings: 2016 New Questions\*

*\*You will see that some of these slides appeared previously in this report, but reappear here in order to emphasize that they were new to the 2016 study.*

# Background: 2016 New Questions

- A panel of ICA members were asked to review the 2014 questionnaire and offered their suggestions for additional questions and areas of learning. The following five areas represent new learnings in the 2016 consumer study:
- Car Wash Usage
  - Thinking about the past year, how many different car wash locations did you use?\*
  - On average, how often do you wash your vehicle at a car wash?\*
  - On average, how much do you pay per wash (not including additional services)?
  - Which of the following additional services have you purchased in the past year?
  - On average, how often do you wash your vehicle at home?\*
- Attitudes, Benefits & Barriers
  - Still thinking about the car wash you use most often, what made you go there the first time?
  - How would each of the following influence your decision to use a car wash INSTEAD OF washing your vehicle at home?\*
  - How might each of the following change your interest in using a car wash?\*
  - How would each of the following influence your decision to wash your vehicle at a car wash MORE OFTEN?\*
  - How important are each of the following [car wash attributes] to you?\*
  - When you wash your car at an exterior car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (does not include interior cleaning), which one of the following do you most prefer?
  - How important is the brand of soap used to wash your vehicle?
  - How easy is it to understand the menu of services at the car wash you use most often?
  - Please rank the following businesses based on your overall experience as a consumer.
  - How satisfied are you with the price you pay per wash?

# Background: 2016 New Questions

- Online Car Wash Media Consumption
  - How would you prefer to receive communications or promotional offers from car washes?
  - How often would you prefer to receive communications or promotional offers for car washes through the following sources?
- Monthly Unlimited Wash Programs
  - Are you aware of a monthly unlimited washing program/subscription at a car wash that you frequent?
  - Are you a member of a monthly unlimited washing program/subscription at a car wash?
  - Which of the following describes your monthly unlimited washing program/subscription?
  - How many times do you visit the wash where you are a member of an unlimited washing program in an average month?
  - Thinking about what you pay for your monthly unlimited washing program/subscription, how many times do you have to visit the wash each month to have it make economic sense?
  - Why did you join a monthly unlimited washing program/subscription?
  - What would make you want to join a monthly unlimited washing program/subscription?
- Washing Vehicles with Safety Features
  - Does your vehicle have any high-tech safety features (i.e. anti-lock braking system, back-up camera, parking sensors)?
  - Do you have any concerns about washing your vehicle at a car wash due to the safety features on your car?
  - Does having high-tech safety features on your vehicle make you more or less likely to wash your vehicle at a car wash?



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## Detailed Findings: 2016 New Questions

### **Car Wash Usage**

Attitudes, Benefits & Barriers

Online Car Wash Media Consumption

Monthly Unlimited Wash Programs

Washing Vehicles with Safety Features

Most respondents are location loyal as 81% only used one or two car wash locations in the past year.

<b>Thinking about the past year, how many different car wash locations did you use?</b>	<b>2016 PRO</b>
<b>Total</b>	N= 1281
<b>I only use one car wash location</b>	32%
<b>I usually only use one or two car wash locations</b>	49%
<b>I probably have used three or more locations</b>	18%
<b>I don't know</b>	1%

On average, 58% wash their car at a PRO wash every couple of months or once a month.

<b>On average, how often do you wash your vehicle at a car wash?</b>	<b>2016 PRO</b>
<b>Total</b>	N= 1281
<b>Once a year</b>	4%
<b>Every six months or so</b>	12%
<b>Every couple of months</b>	32%
<b>Once a month</b>	26%
<b>A few times a month</b>	21%
<b>Once a week or more often</b>	6%

92% spend \$20 dollars or less per car wash (not including additional services).

<b>On average, how much do you pay per wash (not including additional services)?</b>	<b>2016 PRO</b>
<b>Total</b>	N= 1281
<b>\$1-\$5</b>	20%
<b>\$6-\$10</b>	44%
<b>\$11-\$15</b>	20%
<b>\$16-\$20</b>	8%
<b>\$21-\$25</b>	4%
<b>\$26-\$30</b>	2%
<b>\$31-\$35</b>	1%
<b>\$36 or more</b>	1%

The most purchased additional service was interior vacuuming (49%) followed by wax or paint protectant (48%).

Which of the following additional services have you purchased in the past year?	2016 PRO
<b>Total</b>	N=1281
<b>Interior vacuuming (self-service)</b>	49%
<b>Wax or paint protectant</b>	48%
<b>Wheel/rim cleaning</b>	41%
<b>Interior cleaning</b>	41%
<b>Interior vacuuming (done by someone else for me)</b>	38%
<b>Underbody cleaning (of vehicle)</b>	38%
<b>Tire shining</b>	38%
<b>Vehicle hand/towel drying</b>	38%
<b>Exterior polishing</b>	35%
<b>Interior fragrances/air freshener</b>	29%
<b>Other, please specify</b>	1%
<b>None of the above</b>	15%

53% wash their car at home every couple of months or once a month.

<b>On average, how often do you wash your vehicle at home?</b>	<b>2016 DIY</b>
<b>Total</b>	N=867
<b>Once a year</b>	6%
<b>Every six months or so</b>	18%
<b>Every couple of months</b>	31%
<b>Once a month</b>	22%
<b>A few times a month</b>	18%
<b>Once a week or more often</b>	4%



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Convenience was the biggest factor in motivating respondents to visit a car wash for the first time (79%).

<b>Still thinking about the car wash you use most often, what made you go there the first time?</b>	<b>2016 PRO</b>
<b>Total</b>	N=1281
<b>It was convenient</b>	79%
<b>It was a good value</b>	43%
<b>The lines were not too long</b>	39%
<b>The car wash was clean and inviting</b>	31%
<b>It was inexpensive</b>	28%
<b>I could trust that my car would be safe</b>	26%
<b>Other cars looked great when they were done</b>	23%
<b>The employees seemed friendly and professional</b>	22%
<b>I assumed I would feel personally safe when I was there</b>	22%
<b>Someone else recommended it</b>	20%
<b>I could sit inside the car when it went through the wash</b>	19%
<b>They offered discounts and coupons</b>	17%

Only 6% said that they would be motivated to visit a car wash for the first time if that car wash was involved in the community.

<b>Still thinking about the car wash you use most often, what made you go there the first time?</b>	<b>2016 PRO</b>
<b>Total</b>	N=1281
<b>I could get gas or do other shopping</b>	17%
<b>The interior waiting area was clean</b>	15%
<b>The wash process was fun to watch</b>	14%
<b>There were snacks or beverages for sale</b>	11%
<b>They recycled the wash water</b>	11%
<b>They seemed to use less water than other car washes</b>	10%
<b>My kids said they'd enjoy it</b>	9%
<b>They offered a free exterior re-wash if it rains/snows within 5 days</b>	9%
<b>They used soap that is safe for the environment</b>	9%
<b>They offered free coffee, tea or water while I waited</b>	8%
<b>They offered a monthly unlimited washing program/subscription</b>	6%
<b>I saw that the car wash was involved in the community</b>	6%
<b>Other, please specify</b>	3%

Price was the most motivating reason to use a PRO wash instead of washing at home (58%) followed by if it was considered a good value (49%).

How would each of the following influence your decision to use a car wash <b>INSTEAD OF</b> washing your vehicle at home? Top 2 Boxes	<b>2016 DIY ONLY</b>
<b>Total</b>	N=252
<b>If it was less expensive</b>	58%
<b>If it was a good value</b>	49%
<b>If the car would look great when they're done</b>	41%
<b>if it was convenient</b>	40%
<b>If I could trust that my car would be safe</b>	40%
<b>If they offered discounts and coupons</b>	39%
<b>If the lines were not too long</b>	33%
<b>If the employees were friendly and professional</b>	31%
<b>If I would feel personally safe when I am there</b>	31%
<b>If the car wash was clean and inviting</b>	29%
<b>If they offered a free exterior re-wash if it rains/snows within 5 days</b>	27%
<b>If the interior waiting area was clean</b>	27%

Roughly, one-fifth of respondents said they would use a PRO wash instead of washing at home if the PRO wash took steps to reduce their environmental impact such as recycling the wash water or using eco-friendly soap.

How would each of the following influence your decision to use a car wash <b>INSTEAD OF</b> washing your vehicle at home? Top 2 Boxes	<b>2016 DIY ONLY</b>
<b>Total</b>	N=252
<b>If I could sit inside the car when it goes through the wash</b>	27%
<b>If the wash process was fun to experience or watch</b>	23%
<b>If they used soap that is safe for the environment</b>	22%
<b>If they used less water than washing at home</b>	21%
<b>If they offered a monthly unlimited washing program/subscription</b>	20%
<b>If I could get gas or do other shopping</b>	19%
<b>If they recycled the wash water</b>	19%
<b>If they offered free coffee, tea or water while I waited</b>	18%
<b>If they were involved in the community</b>	17%
<b>If someone else recommended it</b>	16%
<b>If my kids said they'd enjoy it</b>	15%
<b>If there were snacks or beverages for sale while I waited</b>	13%

39% said that they would be much more interested or completely interested in using a car wash if it was 'cheap'. Another interpretation is the desire for 'good value'.

How might each of the following change your interest in using a car wash? Top 2 Boxes	2016 NON washers
<b>Total</b>	N=72
<b>If it was cheap</b>	39%
<b>If it was a good value</b>	33%
<b>If they offered discounts and coupons</b>	26%
<b>If I could trust that my car would be safe</b>	25%
<b>If it was convenient</b>	24%
<b>If the lines were not too long</b>	19%
<b>If the car would look great when they're done</b>	18%
<b>If I would feel personally safe when I am there</b>	18%
<b>If they used an environmentally responsible amount of water</b>	17%
<b>If I could get gas or do other shopping</b>	15%
<b>If they offered a free exterior re-wash if it rains/snows within 5 days</b>	15%
<b>If they recycled the wash water</b>	15%

Only 4% said they would be completely or much more interested in using a car wash if someone else recommended it.

How might each of the following change your interest in using a car wash? Top 2 Boxes	2016 NON washers
<b>Total</b>	N=72
<b>If the employees were friendly and professional</b>	14%
<b>If the car wash was clean and inviting</b>	14%
<b>If the wash process was fun to experience or watch</b>	14%
<b>If the interior waiting area was clean</b>	14%
<b>If they used soap that is safe for the environment</b>	13%
<b>If they offered free coffee, tea or water while I waited</b>	11%
<b>If I could sit inside the car when it goes through the wash</b>	11%
<b>If there were snacks or beverages for sale while I waited</b>	8%
<b>If the car wash was involved in the community</b>	8%
<b>If my kids said they'd enjoy it</b>	7%
<b>If they offered a monthly unlimited washing program/subscription</b>	6%
<b>If someone else recommended it</b>	4%

The most influential reasons to wash a car more often was if it was a good value (83%) followed by if their car would look great after (79%).

How would each of the following influence your decision to wash your vehicle at a car wash MORE OFTEN? Top 2 Boxes	2016 PRO
<b>Total</b>	N=1281
<b>If it was a good value</b>	83%
<b>If the car would look great when they're done</b>	79%
<b>If it was less expensive</b>	75%
<b>If it was more convenient</b>	70%
<b>If I could trust that my car would be safe</b>	70%
<b>If they offered discounts and coupons</b>	69%
<b>If the lines were not too long</b>	68%
<b>If I would feel personally safe when I am there</b>	63%
<b>If the car wash was clean and inviting</b>	62%
<b>If the employees were friendly and professional</b>	61%
<b>If they offered a free exterior re-wash if it rains/snows within 5 days</b>	58%
<b>If the interior waiting area was clean</b>	54%

Consumers were least influenced by if there were snacks or beverages for sale while they waited (31%) and if their kids said they enjoyed it (29%).

<b>How would each of the following influence your decision to wash your vehicle at a car wash MORE OFTEN? Top 2 Boxes</b>	<b>2016 PRO</b>
<b>Total</b>	N=1281
<b>If they used soap that is safe for the environment</b>	51%
<b>If they offered a monthly unlimited washing program/subscription</b>	48%
<b>If I could sit inside the car when it goes through the wash</b>	44%
<b>If I could get gas or do other shopping</b>	42%
<b>If they recycled the wash water</b>	40%
<b>If they used less water</b>	39%
<b>If someone else recommended it</b>	38%
<b>If the wash process was fun to experience or watch</b>	38%
<b>If they offered free coffee, tea or water while I waited</b>	37%
<b>If the car wash was more involved in the community</b>	35%
<b>If there were snacks or beverages for sale while I waited</b>	31%
<b>If my kids said they'd enjoy it</b>	29%

61% of PRO washers agree or strongly agree that it is important that their local car wash cares about the environment.

<b>How important are each of the following to you?</b>	<b>2016 PRO</b>
<b>Total</b>	N= 1281
<b>My local car wash is active in the community and supports the community.</b>	33%
<b>My local car wash supports car wash fundraising events for schools, local charities, etc.</b>	36%
<b>My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)</b>	61%

One-third (33%) prefer to order and pay through a touch screen or pay station before entering the car wash.

<b>When you wash your car at an exterior car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle (does not include interior cleaning), which one of the following do you most prefer?</b>	<b>2016 Exterior Most Often</b>
<b>Total</b>	N=252
<b>I prefer to be greeted by an employee and pay them (or someone else) for the wash</b>	27%
<b>I prefer ordering the wash and paying through a touch-screen or pay station before entering the wash</b>	33%
<b>A combination of the above</b>	15%
<b>I don't have a preference</b>	25%

Less than one-third (31%) agree that the brand of soap used is very important

<b>How important is the brand of soap used to wash your vehicle?</b>	<b>2016 PRO</b>
<b>Total</b>	N=1281
<b>Bottom 2</b>	37%
<b>Not at all important</b>	14%
<b>Not very important</b>	23%
<b>Somewhat important</b>	32%
<b>Very important</b>	21%
<b>Extremely important</b>	10%
<b>Top 2</b>	31%

87% of PRO washers said that it was very or somewhat easy to understand the menu of services at the car wash they use most often.

<b>How easy is it to understand the menu of services at the car wash you use most often?</b>	<b>2016 PRO</b>
<b>Total</b>	N=1281
<b>Bottom 2</b>	3%
<b>Very hard</b>	0%
<b>Somewhat hard</b>	3%
<b>Neither easy nor hard</b>	9%
<b>Somewhat easy</b>	40%
<b>Very easy</b>	47%
<b>Top 2</b>	<b>87%</b>

The top-ranked consumer experiences were at grocery stores (66%) followed by sit-down restaurants (58%).

Please rank the following businesses based on your overall experience as a consumer. Top 3 Boxes (1-3)	2016 PRO
<b>My Favorite Grocery Store</b>	66% (N=1281)
<b>My Favorite Sit-Down Restaurant</b>	58% (N=1279)
<b>My Favorite Mass Retailer</b>	45% (N=1277)
<b>My Favorite Quick-Serve Restaurant</b>	30% (N=1280)
<b>My Favorite Car Wash</b>	25% (N=1278)
<b>My Favorite Gas Station</b>	22% (N=1281)
<b>My Favorite Bank</b>	19% (N=1280)
<b>My Favorite Home Improvement Store</b>	16% (N=1276)
<b>My Favorite Hair Salon or Barber</b>	16% (N=1278)
<b>My Favorite Dry Cleaner</b>	3% (N=1273)

Q: Please rank the following businesses based on your overall experience as a consumer.

63% were somewhat or very satisfied with the price they paid for their car wash.

<b>How satisfied are you with the price you pay per wash?</b>	<b>2016 PRO</b>
<b>Total</b>	N= 1281
<b>Bottom 2</b>	17%
<b>Very dissatisfied</b>	3%
<b>Somewhat dissatisfied</b>	14%
<b>Neither satisfied nor dissatisfied</b>	21%
<b>Somewhat satisfied</b>	40%
<b>Very satisfied</b>	23%
<b>Top 2</b>	63%

Full-service most often users are significantly more satisfied with the price they pay per wash.

How satisfied are you with the price you pay per wash?	Full-Service Most Often A	Exterior Most Often B	Automatic Most Often C	Hand Wash Most Often D	Self-Service Most Often E
<b>Total</b>	N=358	N=252	N=216	N=69	N=167
<b>Very dissatisfied</b>	2%	3%	4%	1%	1%
<b>Somewhat dissatisfied</b>	9%	12%	18% <b>Ab</b>	17% <b>a</b>	16% <b>A</b>
<b>Neither satisfied nor dissatisfied</b>	15%	22% <b>A</b>	22% <b>A</b>	19%	22% <b>A</b>
<b>Somewhat satisfied</b>	44%	39%	38%	35%	40%
<b>Very satisfied</b>	30% <b>bCE</b>	23%	19%	26%	20%



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Washing Vehicles with Safety Features

Almost half would prefer to receive communications and offers through email (48%). Another 43% would prefer to receive communications and offers through regular mail.

<b>How would you prefer to receive communications or promotional offers from car washes?</b>	<b>2016</b>
<b>Total</b>	N= 1606
<b>Email</b>	48%
<b>Regular mail</b>	43%
<b>Facebook</b>	25%
<b>Local coupon mailing (e.g., Valpak, xyz, etc.)</b>	23%
<b>Newspaper ad</b>	19%
<b>Car wash website</b>	15%
<b>Groupon</b>	13%
<b>Coupons.com</b>	10%
<b>Twitter</b>	9%
<b>Search Engine (Google/Yahoo/Bing)</b>	9%
<b>LivingSocial</b>	5%

18% did not want to receive any communications or offers from car washes.

How would you prefer to receive communications or promotional offers from car washes?	2016
<b>Total</b>	N=1606
<b>Banner ad on a website</b>	4%
<b>SmartSource.com</b>	3%
<b>Coupon bloggers</b>	3%
<b>Instagram</b>	3%
<b>Pinterest</b>	3%
<b>Other coupon app or website</b>	3%
<b>Snapchat</b>	2%
<b>Waze</b>	1%
<b>Other (please specify)</b>	1%
<b>I do not want to receive communications or promotional offers from car washes</b>	18%

62% said they would prefer to receive communications or offers for car washes from coupon bloggers at least once a week.

<b>How often would you prefer to receive communications or promotional offers for car washes through the following sources? Top 2 Boxes (Every few days or more often/Once a week)</b>	<b>2016</b>
<b>Total</b>	N=1311
<b>Coupon bloggers</b>	62%
<b>Snapchat</b>	53%
<b>Waze</b>	53%
<b>Pinterest</b>	52%
<b>SmartSource.com</b>	43%
<b>Instagram</b>	43%
<b>Twitter</b>	41%
<b>LivingSocial</b>	40%
<b>Banner ad on a website</b>	39%
<b>Other coupon app or website</b>	39%
<b>Search Engine (Google/Yahoo/Bing)</b>	36%

While email was the most preferred channel to receive communications from car washes, only 21% wanted to receive communications or offers from email at least once a week.

**How often would you prefer to receive communications or promotional offers for car washes through the following sources? Top 2 Boxes (Every few days or more often/Once a week)**

**2016**

**Total**

N=1311

**Facebook**

31%

**Newspaper ad**

31%

**Coupons.com**

30%

**Car wash website**

28%

**Groupon**

26%

**Email**

21%

**Local coupon mailing (e.g., Valpak, xyz, etc.)**

21%

**Regular mail**

15%

**Other (please specify)**

9%

**I do not want to receive communications or promotional offers from car washes**

0%



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Only 22% of PRO washers are aware of a monthly unlimited washing program at the car wash they frequent.

<b>Are you aware of a monthly unlimited washing program/subscription at a car wash that you frequent?</b>	<b>2016 PRO</b>
<b>Total</b>	N=1281
<b>Yes</b>	22%
<b>No</b>	78%

36% of those who are aware of a monthly unlimited washing program say they are also a member.

<b>Are you a member of a monthly unlimited washing program/subscription at a car wash?</b>	<b>2016</b>
<b>Aware of Monthly Unlimited Washing Program</b>	N=276
<b>Yes</b>	36%
<b>No</b>	64%

77% who are members of a monthly unlimited washing program, say that they are year-round members.

<b>Which of the following describes your monthly unlimited washing program/subscription?</b>	<b>2016</b>
<b>Member of Monthly Unlimited Washing Program</b>	N=99
<b>I'm a year-round member</b>	77%
<b>I'm only a member during particular seasons</b>	18%
<b>None of the above</b>	5%

53% of members visit their monthly unlimited washing program 4 times or more a month.

<b>How many times do you visit the wash where you are a member of an unlimited washing program in an average month?</b>	<b>2016</b>
<b>Member of Monthly Unlimited Washing Program</b>	N=99
<b>1 time</b>	14%
<b>2 times</b>	15%
<b>3 times</b>	18%
<b>4 times</b>	21%
<b>5 times</b>	11%
<b>6 or more times</b>	21%

67% of members believe that visiting a monthly unlimited washing program between 2 to 4 times per month would be enough for being a member to make economic sense.

<b>Thinking about what you pay for your monthly unlimited washing program/subscription, how many times do you have to visit the wash each month to have it make economic sense?</b>	<b>2016</b>
<b>Member of Monthly Unlimited Washing Program</b>	N=99
<b>1 time</b>	10%
<b>2 times</b>	21%
<b>3 times</b>	25%
<b>4 times</b>	21%
<b>5 times</b>	14%
<b>6 or more times</b>	9%

76% of members joined a monthly unlimited car wash program, because they believed it was a better value.

<b>Why did you join a monthly unlimited washing program/subscription?</b>	<b>2016</b>
<b>Member of Monthly Unlimited Washing Program</b>	N=99
<b>It is a better value</b>	<b>76%</b>
<b>I like keeping my car clean all the time</b>	55%
<b>Washing is already part of my car maintenance routine</b>	52%
<b>A clean vehicle makes me feel better about myself</b>	49%
<b>I get a wider variety of services for the price</b>	43%
<b>It eliminates the risk of bad weather (i.e. the car getting dirty soon after being washed)</b>	42%
<b>It protects the value of my vehicle</b>	42%
<b>It makes me feel like I'm part of a special club</b>	35%
<b>The car wash has multiple locations</b>	31%
<b>It makes visiting the wash more convenient due to the dedicated member entry lane</b>	27%
<b>It is required by the car wash (they only offer a monthly subscription or unlimited wash program)</b>	21%
<b>Other, please specify</b>	1%

Greater value was the most influential reason why consumers who are already aware of a monthly unlimited washing program would consider joining (71%).

<b>What would make you want to join a monthly unlimited washing program/subscription?</b>	<b>2016</b>
<b>Aware, but not a Member of a Monthly Unlimited Washing Program</b>	N=178
<b>If it provided me a greater value</b>	71%
<b>If the car wash had multiple locations</b>	40%
<b>If I got a wider variety of services for the price</b>	39%
<b>If it allowed me to enter the car wash faster/ahead of others</b>	29%
<b>If it made me feel like I'm part of a special club</b>	19%
<b>If it was required by the car wash</b>	13%
<b>Other, please specify</b>	6%

61% of members of unlimited washing programs use full-service car washes most often.

<b>Which ONE of the following do you do most often to wash your vehicle?</b>	<b>2016</b>
<b>Members of Monthly Unlimited Washing Program</b>	N=99
<b>Full</b>	61%
<b>Exterior</b>	20%
<b>Stationary</b>	9%
<b>Hand</b>	4%
<b>Self</b>	3%
<b>Washed at home</b>	4%

Those who are members of an unlimited washing program use full service more often than those who are aware, but not members. Those who are aware, but not members of an unlimited washing program wash at home more often than those who are members.

<b>Which ONE of the following do you do most often to wash your vehicle?</b>	<b>2016 Members A</b>	<b>2016 Aware B</b>
<b>Total</b>	N=99	N=276
<b>Full</b>	61% B	42%
<b>Exterior</b>	20%	26%
<b>Stationary</b>	9%	10%
<b>Hand</b>	4%	5%
<b>Self</b>	3%	6%
<b>Washed at home</b>	4%	11% A



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Monthly Unlimited Wash Programs  
**Washing Vehicles with Safety Features**

58% said their vehicle has high-tech safety features.

<b>Does your vehicle have any high-tech safety features?</b>	<b>2016</b>
<b>Total</b>	N= 1606
<b>Yes</b>	58%
<b>No</b>	42%

80% had no concerns with washing their vehicle that has high-tech safety features at a PRO wash.

<b>Do you have any concerns about washing your vehicle at a car wash due to the safety features on your car?</b>	<b>2016</b>
<b>Has High-Tech Safety Features</b>	N=936
<b>Yes</b>	20%
<b>No</b>	80%

Having a vehicle with high-tech safety features is unlikely to change car wash behavior. 70% said they are not less likely nor more likely to wash their vehicle at a PRO wash when it has high-tech safety features.

<b>Does having high-tech safety features on your vehicle make you more or less likely to wash your vehicle at a car wash?</b>	<b>2016</b>
<b>Has High-Tech Safety Features</b>	N=936
<b>Bottom 2</b>	7%
<b>Much less likely</b>	2%
<b>Somewhat less likely</b>	4%
<b>Neither more nor less likely</b>	70%
<b>Somewhat more likely</b>	14%
<b>Much more likely</b>	9%
<b>Top 2</b>	24%



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## Appendix

### Demographic Profile: 2014 vs. 2016 Total Sample



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## Demographic Profile: Total Sample (2014 vs. 2016)

*Readers Note: This section of the report provides a comparative profile of the total sample of respondents from 2014 to 2016.*

# Gender

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Male</b>	48%	48%
<b>Female</b>	52%	52%

# Age

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>18-24</b>	15% <b>b</b>	13%
<b>25-34</b>	20% <b>B</b>	17%
<b>35-44</b>	17%	17%
<b>45-54</b>	16%	20% <b>A</b>
<b>55-64</b>	15%	16%
<b>65+</b>	16%	16%

# Household Income

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Under \$20,000</b>	18%	19%
<b>\$20,000-\$29,999</b>	12%	11%
<b>\$30,000-\$39,999</b>	11%	10%
<b>\$40,000-\$49,999</b>	9%	10%
<b>\$50,000-\$59,999</b>	8%	8%
<b>\$60,000-\$74,999</b>	10%	10%
<b>\$75,000-\$99,999</b>	12%	12%
<b>\$100,000-\$149,999</b>	11%	12%
<b>\$150,000 or over</b>	10%	10%

# Marital Status

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Single</b>	31%	29%
<b>Living with someone but not married</b>	7%	7%
<b>Engaged to be married/Married/Domestic Partnership</b>	48%	50%
<b>Divorced/Widowed/Separated</b>	14%	14%

# Ethnicity

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>White/Caucasian</b>	65%	64%
<b>Spanish/Hispanic/Latino</b>	14%	16%
<b>Black/African American</b>	13%	11%
<b>Asian</b>	4%	5%
<b>Pacific Islander</b>	0%	0%
<b>Native American</b>	1%	1%
<b>Other</b>	3%	3%

# Education

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Did not complete high school</b>	2%	3%
<b>High school graduate or equivalent</b>	13%	19% <b>A</b>
<b>Some college or trade school</b>	26%	28%
<b>College or trade school graduate</b>	37%	37%
<b>Post graduate</b>	23% <b>B</b>	13%

# Employment

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Employed full-time</b>	49% <b>B</b>	42%
<b>Employed part-time</b>	10%	10%
<b>Not currently employed</b>	4%	6% <b>A</b>
<b>Self-employed</b>	6%	6%
<b>Student</b>	8% <b>B</b>	6%
<b>Homemaker</b>	4%	8% <b>A</b>
<b>Retired</b>	17%	20% <b>A</b>
<b>Other</b>	2% <b>B</b>	1%

# Regionality

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Northeast</b>	16%	18%
<b>South</b>	36%	34%
<b>Midwest</b>	21%	20%
<b>Southwest</b>	6%	5%
<b>West</b>	22%	23%

# Age of Vehicle

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Less than 1 year old</b>	8%	9%
<b>1-3 years' old</b>	20%	25% <b>A</b>
<b>4-5 years' old</b>	14%	17% <b>A</b>
<b>6-9 years' old</b>	25% <b>B</b>	17%
<b>More than 10 years' old</b>	33%	32%

# Driving Miles Per Year

	<b>2014 A</b>	<b>2016 B</b>
<b>Total</b>	N=1675	N=1606
<b>Less than 2,500</b>	9%	12% <b>A</b>
<b>2,501-5,000</b>	15%	15%
<b>5,001-10,000</b>	25%	25%
<b>10,001-15,000</b>	25%	25%
<b>15,001-25,000</b>	15% <b>B</b>	12%
<b>More than 25,000</b>	5%	4%
<b>I don't know</b>	5%	7% <b>A</b>