

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

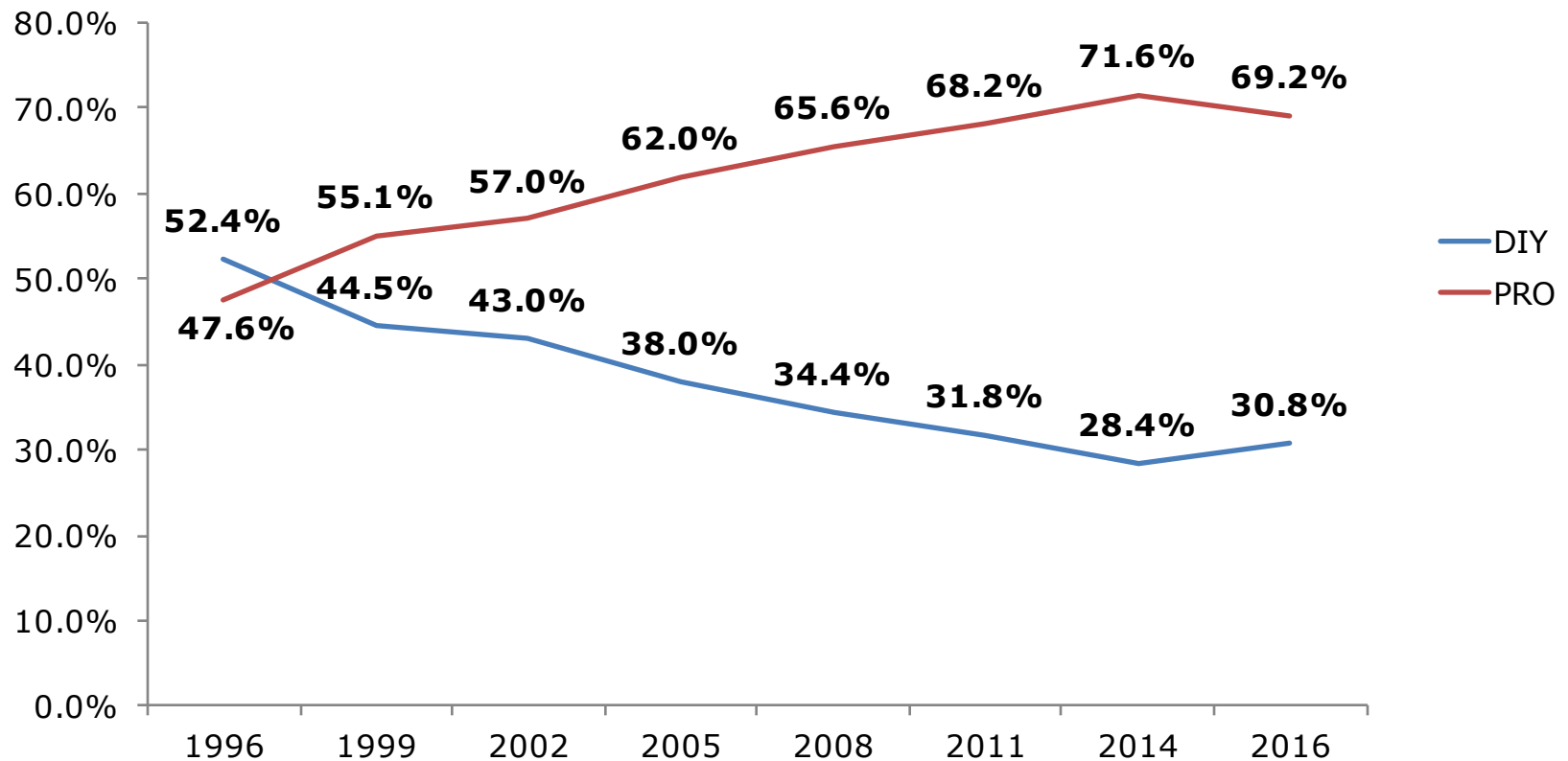
Nearly every American washes their vehicle. While the difference is not significant, even more washed in 2016.

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

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

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).

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

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

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

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

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.



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

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



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.

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

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

Age of Vehicle vs. PRO Wash Frequency	0-3 yrs old A	4-9 yrs old B	More than 10 yrs old C
Total	N=469	N=461	N=351
Once a year	3%	5%	5%
Every six months or so	9%	13% A	14% A
Every couple of months	27%	30%	40% AB
Once a month	29% bC	24%	22%
A few times a month	24% C	23% C	14%
Once a week or more often	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
Total	N= 1319	N= 1281
I'm a member of a frequent washer club	11%	21% A

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.

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

PRO washers are significantly more likely to agree with the emotional benefits 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
Total	N=1319	N=1281
A clean vehicle makes me feel good	75%	87% A
I want the vehicle to look good for special occasions	73%	74%
A clean vehicle is a good reflection on me	69%	77% A
It's a treat to have my vehicle washed	59%	68% A
When the weather is nice, I enjoy getting a car wash	58%	60%
I don't enjoy doing it myself	46%	50% A
It's a fun family activity	15%	32% A

PRO washers are also significantly more likely to agree with the rational benefits 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
Total	N=1319	N=1281
Washing helps protect the value of my vehicle	72%	80% A
I want to prevent my vehicle from rusting	67%	77% A
It saves time	65%	75% A
It's part of my car maintenance routine	55%	69% A
A car wash does a better job than I can do myself	48%	62% A
I have a coupon or other price discount	41%	42%
It's convenient to wash my vehicle while I am doing something else, like buying gas	39%	58% A
It is safer for the environment than washing at home	26%	42% A
It costs less money than washing the vehicle myself	18%	32% A

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
Total	N=1675	N=1606
Washing a car at a car wash is <u>less work</u> than washing a car at home	89%	89%
Washing a car at a car wash is <u>faster</u> than washing a car at home	85%	86%
Washing a car at a car wash is <u>more convenient</u> than washing a car at home	75%	78% A
Washing a car at a car wash is <u>more enjoyable</u> than washing a car at home	61%	69% A
Washing a car at a car wash <u>provides a better overall quality of wash</u> than washing a car at home	46%	60% A
Washing a car at a car wash is <u>safer for the environment</u> than washing a car at home	40%	55% A
Washing a car at a car wash is a <u>better overall value</u> than washing a car at home	36%	51% A
Washing a car at a car wash is <u>safer for the car</u> than washing a car at home	23%	37% A
Washing a car at a car wash <u>costs less</u> than washing a car at home	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 5th 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
My Favorite Grocery Store	66% (N=1281)
My Favorite Sit-Down Restaurant	58% (N=1279)
My Favorite Mass Retailer	45% (N=1277)
My Favorite Quick-Serve Restaurant	30% (N=1280)
My Favorite Car Wash	25% (N=1278)
My Favorite Gas Station	22% (N=1281)
My Favorite Bank	19% (N=1280)
My Favorite Home Improvement Store	16% (N=1276)
My Favorite Hair Salon or Barber	16% (N=1278)
My Favorite Dry Cleaner	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
Total	N=358	N=251	N=216	N=68	N=166
1 - Best	18% BCdE	9%	10%	9%	8%
2	10% BCE	5%	5%	6%	3%
3	13% BCE	4%	4%	10% BC	7%
4	13%	10%	12%	12%	14%
5	12%	15%	10%	22% ACE	11%
6	9%	12%	16% Ae	10%	10%
7	6%	16% AD	13% AD	3%	16% AD
8	9%	14% A	14% A	19% A	15% A
9	7%	9%	13% A	9%	11% a
10 - Worst	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
Total	N=1319	N=1281
Cleanliness (the vehicle is clean, all dirt has been removed)	87%	93% A
Price (it is a good value)	80%	87% A
Shininess (the vehicle is shiny and bright)	67%	76% A
Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)	65%	81% A
Dryness (the vehicle is dry, there is no water or soap remaining)	64%	76% A
Speed (I can get in and out quickly)	57%	75% A
Hours of operation (the car wash is open when I want a wash)	N/A	73%
Human interaction (there is an employee who greets you and personally takes your payment)	N/A	34%
Self-service (a touch screen or pay station takes your payment)	N/A	44%

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

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

Importance vs. Worth Paying More For (Additional Services)	2016 Importance	2016 Worth Paying More For	Gap
Total	N=1319	N=1281	
Having the wheels and rims cleaned	66%	38%	-28
Being able to vacuum the interior myself	48%	22%	-26
Having the underbody of the vehicle cleaned	62%	42%	-20
Having the vehicle hand towel dried	50%	30%	-20
Having the tires shined	51%	32%	-19
Having a fragrance added to the interior	35%	18%	-17
Having the exterior polished	56%	40%	-16
Having the interior cleaned	60%	44%	-16
Having a wax or paint protectant applied	59%	52%	-7
Having the interior vacuumed for me	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
Total	N=1281
My local car wash is active in the community and supports the community.	33%
My local car wash supports car wash fundraising events for schools, local charities, etc.	36%
My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)	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.

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

Have you received any online communications or offers from a car wash in the past year?	2014 A	2016 B
Total	N=1675	N=1606
Yes	7%	11% A
No	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
Total	N=121	N=182
Email	48%	41%
Facebook	25%	39% A
Groupon	15%	18%
Car wash website	12%	34% A
LivingSocial	11%	15%
Banner ad on a website	10%	13%
Coupons.com	10%	19% A
Twitter	7%	25% A
Other coupon app or website	7%	5%
Coupon bloggers	5%	10% a

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
Total	N=121	N=182	N=118	N=181
Email	48%	41%	44% D	31%
Facebook	25%	39% A	18%	28% C
Groupon	15%	18%	13%	8%
Car wash website	12%	34% A	10%	25% C
LivingSocial	11%	15%	4%	6%
Banner ad on a website	10%	13%	1%	7% C
Coupons.com	10%	19% A	8%	11%
Twitter	7%	25% A	3%	17% C
Other coupon app or website	7%	5%	2%	2%
Coupon bloggers	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
Total	N=99	N=1183
Human interaction (there is an employee who greets you and personally takes your payment)	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
Total	N=99	N=1183
My local car wash is active in the community and supports the community.	68% B	30%
My local car wash supports car wash fundraising events for schools, local charities, etc.	73% B	33%
My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)	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
Total	N=99	N=1183
Bottom 2	3%	17%
Very dissatisfied	0%	3% a
Somewhat dissatisfied	3%	14% A
Neither satisfied nor dissatisfied	10%	21% A
Somewhat satisfied	33%	41%
Very satisfied	54% B	20%
Top 2	87% 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
Total	N=99	N=1183
Once a year	10% B	4%
Every six months or so	7%	12%
Every couple of months	23%	32% a
Once a month	13%	27% A
A few times a month	31% B	20%
Once a week or more often	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
Total	N=99	N=1183
Interior vacuuming (done by someone else for me)	66% B	36%
Interior vacuuming (self-service)	54%	49%
Wheel/rim cleaning	56% B	40%
Underbody cleaning (of vehicle)	56% B	36%
Tire shining	59% B	37%
Wax or paint protectant	63% B	46%
Exterior polishing	58% B	33%
Interior cleaning	55% B	40%
Vehicle hand/towel drying	46% b	38%
Interior fragrances/air freshener	38% B	29%
Other, please specify	2% B	0%
None of the above	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
Total	N=1319	N=1281
I'm a member of a frequent washer club	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
Total	N=99	N=1183
Washing a vehicle is an important and necessary part of routine maintenance	87% B	66%
Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me	9%	23% A
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	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
Total	N=99	N=1183
It is safer for the environment than washing at home	66% B	39%
It uses less water than washing at home	75% B	54%
I want the vehicle to look good for special occasions	84% B	73%
It's part of my car maintenance routine	84% B	68%
It's convenient to wash my vehicle while I am doing something else, like buying gas	71% B	57%
It's a fun family activity	67% B	30%
I have a coupon or other price discount	63% B	41%
I'm a member of a frequent washer club	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
Total	N=99	N=1183
Having the interior vacuumed for me	77% B	47%
Being able to vacuum the interior myself	62% B	47%
Having the wheels and rims cleaned	83% B	65%
Having the underbody of the vehicle cleaned	83% B	60%
Having the tires shined	83% B	48%
Having a wax or paint protectant applied	89% B	57%
Having the exterior polished	83% B	54%
Having the interior cleaned	79% B	58%
Having the vehicle hand towel dried	76% B	48%
Having a fragrance added to the interior	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
Total	N=99	N=1183
Bottom 2	15%	39% A
Not at all important	1%	15% A
Not very important	14%	24% A
Somewhat important	22%	33% A
Very important	29% B	20%
Extremely important	33% B	8%
Top 2	63% 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)
Total	N=99	N=1183	
18-24	22% B	13%	169
25-34	31% B	18%	172
35-44	25% b	18%	139
45-54	10%	20% A	50
55-64	4%	17% A	24
65+	6%	15% A	40

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

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

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

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

Members of unlimited wash programs have higher household incomes.

	Members of Unlimited Wash Programs A	Non-Member Pro Washers B	Index (Members vs. non- members)
Total	N=99	N=1183	
Under \$20,000	6%	17% A	35
\$20,000-\$29,999	9%	10%	90
\$30,000-\$39,999	8%	10%	80
\$40,000-\$49,999	10%	10%	100
\$50,000-\$59,999	9%	8%	113
\$60,000-\$74,999	10%	10%	100
\$75,000-\$99,999	17%	12%	142
\$100,000-\$149,999	15%	12%	125
\$150,000 or over	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)
Total	N=99	N=1183	
Less than 1 year old	21% B	8%	263
1-3 years' old	36% B	27%	133
4-5 years' old	22%	18%	122
6-9 years' old	10%	18% A	56
More than 10 years' old	9%	29% A	31

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

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

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

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



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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.

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

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
Total	N=1319	N=1281
A clean vehicle makes me feel good	75%	87% A
I want the vehicle to look good for special occasions	73%	74%
Washing helps protect the value of my vehicle	72%	80% A
A clean vehicle is a good reflection on me	69%	77% A
A clean vehicle makes me feel proud	67%	N/A
I want to prevent my vehicle from rusting	67%	77% A
It saves time	65%	75% A
A clean vehicle makes me feel better about myself	61%	N/A
It's a treat to have my vehicle washed	59%	68% A
When the weather is nice, I enjoy getting a car wash	58%	60%
It's part of my car maintenance routine	55%	69% A

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
Total	N=1319	N=1281
A car wash does a better job than I can do myself	48%	62% A
I don't enjoy doing it myself	46%	50% A
I have a coupon or other price discount	41%	42%
It's convenient to wash my vehicle while I am doing something else, like buying gas	39%	58% A
It's fun to have my vehicle washed	38%	N/A
I personally enjoy the experience	35%	N/A
It is safer for the environment than washing at home	26%	42% A
It uses less water than washing at home	N/A	56%
It costs less money than washing the vehicle myself	18%	32% A
It's a fun family activity	15%	32% A
I'm a member of a frequent washer club	11%	21% A

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.

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

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

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

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

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

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

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

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

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

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

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.

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	2014 DIY Only A	2016 DIY Only B
Total	N=275	N=252
It costs less	81%	90% A
I do a more thorough job than a car wash does	64%	69%
I like to do it myself	61%	74% A
I enjoy washing my vehicle myself when the weather is nice	60%	77% A
It's fun to wash my car	47%	60% A
I worry that the car wash will damage my car	45%	52%
It's part of my routine	43%	60% A
Washing my vehicle at a car wash doesn't really save time	40%	39%
Washing my vehicle myself is safer for the environment	38%	46% a
I don't trust car wash employees	28%	30%
It's a fun family activity	24%	41% A
Washing my vehicle myself uses less water	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.

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

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

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

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

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

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

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

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

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

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

On average, how often do you wash your vehicle at a car wash?	Pro Most Often A	DIY Most Often B
Total	N= 1062	N= 220
Once a year	4%	5%
Every six months or so	11%	15%
Every couple of months	30%	38% A
Once a month	27% b	20%
A few times a month	22%	18%
Once a week or more often	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
Total	N=1062	N=472
Full	50% B	14%
Exterior	44% B	19%
Stationary	42% B	17%
Hand	27% B	10%
Self	38% B	24%
DIY	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
Total	N= 1062	N= 220
Very dissatisfied	2%	4%
Somewhat dissatisfied	13%	14%
Neither satisfied nor dissatisfied	20%	25% a
Somewhat satisfied	40%	41%
Very satisfied	24% B	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
Total	N=1062	N=220
Interior vacuuming (done by someone else for me)	41% B	28%
Interior vacuuming (self-service)	49%	53%
Wheel/rim cleaning	43% B	35%
Underbody cleaning (of vehicle)	39% B	31%
Tire shining	39%	35%
Wax or paint protectant	49% b	42%
Exterior polishing	36%	30%
Interior cleaning	43% B	34%
Vehicle hand/towel drying	40% B	32%
Interior fragrances/air freshener	30%	26%
Other, please specify	1%	0%
None of the above	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
Total	N=1062	N=472
Washing a vehicle is an important and necessary part of routine maintenance	68% b	63%
Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me	22%	22%
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	10%	15% A

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.

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

For both cohorts, the emotional benefits are the most influential reasons for 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	Pro Most Often A	DIY Most Often B
Total	N=1062	N=220
I don't enjoy washing it myself	55% B	24%
A clean vehicle makes me feel good	86%	89%
A clean vehicle makes me feel proud	0%	0%
A clean vehicle makes me feel better about myself	0%	0%
A clean vehicle is a good reflection on me	77%	78%
A car wash does a better job than I can do myself	67% B	38%
It saves time	76%	72%
It costs less money than washing the vehicle myself	34% B	22%
It's a treat to have my vehicle washed	68%	71%
It's fun to have my vehicle washed	0%	0%
Washing helps protect the value of my vehicle	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
Total	N=1062	N=220
Cleanliness	92%	95%
Dryness	75%	78%
Shininess	76%	79%
Speed	75%	75%
Convenience	80%	82%
Price	86%	91% A
Hours of operation	74% B	67%
Human interaction	35% B	26%
Self-service	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
Total	N=1062	N=220
Having the interior vacuumed for me	50% B	42%
Being able to vacuum the interior myself	48%	48%
Having the wheels and rims cleaned	66%	67%
Having the underbody of the vehicle cleaned	61%	61%
Having the tires shined	51%	46%
Having a wax or paint protectant applied	60%	56%
Having the exterior polished	56%	57%
Having the interior cleaned	61% B	54%
Having the vehicle hand towel dried	52% B	42%
Having a fragrance added to the interior	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 INSTEAD OF another car wash?	Pro Most Often A	DIY Most Often B
Total	N= 1062	N= 220
It is convenient	58%	60%
It's where I buy gas or do other shopping	15% B	9%
It is inexpensive	28% b	22%
It is a good value	36% b	30%
The employees are friendly and professional	23% B	14%
I trust that my car will be safe	25% B	19%
The lines are never too long	31%	26%
The car looks great when they're done	28%	24%
I feel personally safe when I am there	24% B	15%
They offer discounts and coupons	13%	15%
It's the car wash my family and friends prefer	11%	9%
It is clean and inviting	24%	20%
The wash process is fun to experience or watch	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
Total	N=1062	N=472
Washing a car at a car wash is less work than washing a car at home	92% B	83%
Washing a car at a car wash is faster than washing a car at home	91% B	75%
Washing a car at a car wash is more convenient than washing a car at home	89% B	55%
Washing a car at a car wash is more enjoyable than washing a car at home	72% B	36%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	72% B	35%
Washing a car at a car wash is safer for the environment than washing a car at home	64% B	24%
Washing a car at a car wash is a better overall value than washing a car at home	46% B	13%
Washing a car at a car wash is safer for the car than washing a car at home	47% B	17%
Washing a car at a car wash costs less than washing a car at home	43% B	18%
Washing at a car wash uses less water than washing a car at home	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
Total	N=1062	N=220
My local car wash is active in the community and supports the community.	35% B	25%
My local car wash supports car wash fundraising events for schools, local charities, etc.	37%	33%
My local car wash cares about the environment (e.g., not polluting the water with chemicals, using water responsibly, etc.)	62% 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
Total	N=1062	N=472
I recycle	83%	84%
I purchase environmentally friendly products, even if they cost a bit more	46% B	39%
It's important that I understand the carbon footprint of my purchase decisions	38%	38%
None of the above	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
Total	N=1062	N=472
Yes	15% B	6%
No	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
Total	N=154	N=26
Facebook	39%	42%
Twitter	25%	27%
Search engine (Google/Yahoo/Bing)	24% b	8%
Car wash website	34%	31%
Email	42%	35%
Banner ad on a website	16% B	0%
Coupons.com	19%	19%
Groupon	16%	31% a
LivingSocial	17% b	4%
SmartSource.com	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
Total	N=154	N=26
Facebook	31%	15%
Twitter	18%	12%
Search Engine (Google/Yahoo/Bing)	18% b	4%
Car wash website	26%	23%
Email	33%	23%
Banner ad on a website	8%	0%
Coupons.com	12%	8%
Groupon	7%	12%
LivingSocial	7%	0%
SmartSource.com	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
Total	N=1062	N=220
Yes	23% B	14%
No	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
Aware of a Monthly Car Wash Program	N=245	N=31
Yes	39% B	13%
No	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.

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

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

What would make you want to join a monthly unlimited washing program/subscription?	Pro Most Often A	DIY Most Often B
Aware, but not a Member of a Monthly Unlimited Washing Program	N= 151	N= 27
If it provided me a greater value	69%	85% a
If I got a wider variety of services for the price	37%	48%
If it made me feel like I'm part of a special club	19%	11%
If it was required by the car wash	15%	4%
If the car wash had multiple locations	37%	59% A
If it allowed me to enter the car wash faster/ahead of others	31% b	15%
Other, please specify	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
Total	N= 1062	N= 472
Yes	61% B	54%
No	39%	46% A

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

Do you have any concerns about washing your vehicle at a car wash due to the safety features on your car?	Pro Most Often A	DIY Most Often B
Has High-Tech Safety Features	N=653	N=256
Yes	19%	23%
No	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
Has High-Tech Safety Features	N=653	N=256
Bottom 2	3%	16% A
Much less likely	1%	6% A
Somewhat less likely	2%	10% A
Neither more nor less likely	68%	71%
Somewhat more likely	17% B	9%
Much more likely	12% B	3%
Top 2	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.

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



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Sub-segment Analysis: PRO Most Often versus NON Washers

Demographic Profile Attitudes, Benefits & Barriers

Gender

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

	PRO Most Often A	NON Washers B
Total	N=1062	N=72
Less than 2,500	10%	25% A
2,501-5,000	15%	22% a
5,001-10,000	26%	19%
10,001-15,000	26%	21%
15,001-25,000	13% B	3%
More than 25,000	4% b	0%
I don't know	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
Total	N=1062	N=72
Washing a vehicle is an important and necessary part of routine maintenance	68% B	15%
Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me	22%	21%
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	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
Total	N=1062	N=72
Washing a car at a car wash is less work than washing a car at home	92% B	82%
Washing a car at a car wash is faster than washing a car at home	91% B	82%
Washing a car at a car wash is more convenient than washing a car at home	89% B	69%
Washing a car at a car wash is more enjoyable than washing a car at home	81% B	63%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	55%	51%
Washing a car at a car wash is safer for the environment than washing a car at home	47% B	17%
Washing a car at a car wash is a better overall value than washing a car at home	64% B	32%
Washing a car at a car wash is safer for the car than washing a car at home	29% B	15%
Washing a car at a car wash costs less than washing a car at home	43% B	15%
Washing at a car wash uses less water than washing a car at home	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
Total	N=1062	N=72
I recycle	83% B	68%
I purchase environmentally friendly products, even if they cost a bit more	46% B	18%
It's important that I understand the carbon footprint of my purchase decisions	38% B	21%
None of the above	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%.

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

Gender

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

	2014 PRO Only A	2016 PRO Only B
Total	N=828	N=667
Less than 2,500	10%	10%
2,501-5,000	15%	16%
5,001-10,000	25%	27%
10,001-15,000	25%	24%
15,001-25,000	15% B	10%
More than 25,000	5%	5%
I don't know	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
Total	N=828	N=667
Full	41%	49% A
Exterior	39%	40%
Stationary	35%	35%
Hand	17%	20%
Self	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
Total	N=828	N=667
Full	30%	38% A
Exterior	28% b	24%
Stationary	22%	19%
Hand	7%	6%
Self	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
Total	N=828	N=667
Washing a vehicle is an important and necessary part of routine maintenance	49%	63% A
Washing a vehicle is a discretionary purchase, but something that I like to have done	30% B	22%
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	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
Total	N=828	N=667
A clean vehicle makes me feel good	71%	83% A
I want the vehicle to look good for special occasions	69%	71%
Washing helps protect the value of my vehicle	70%	78% A
A clean vehicle is a good reflection on me	64%	74% A
A clean vehicle makes me feel proud	64%	N/A
I want to prevent my vehicle from rusting	64%	74% A
It saves time	65%	73% A
A clean vehicle makes me feel better about myself	58%	N/A
It's a treat to have my vehicle washed	60%	64%
When the weather is nice, I enjoy getting a car wash	56%	52%
It's part of my car maintenance routine	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
Total	N=828	N=667
Cleanliness (the vehicle is clean, all dirt has been removed)	84%	90% A
Price (it is a good value)	78%	84% A
Shininess (the vehicle is shiny and bright)	65%	72% A
Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)	67%	79% A
Dryness (the vehicle is dry, there is no water or soap remaining)	62%	75% A
Speed (I can get in and out quickly)	57%	73% A
Hours of operation (the car wash is open when I want a wash)	N/A	74%
Human interaction (there is an employee who greets you and personally takes your payment)	N/A	37%
Self-service (a touch screen or pay station takes your payment)	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
Total	N=828	N=667
Having the underbody of the vehicle cleaned	45%	60% A
Having the interior vacuumed for me	46%	53% A
Having a wax or paint protectant applied	43%	60% A
Having the wheels specially cleaned	43%	N/A
Having the vehicle hand towel dried	36%	53% A
Getting my tires dressed or shined	36%	N/A
Being able to vacuum the interior myself	29%	44% A
Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)	27%	N/A
Having a fragrance added to the interior	21%	37% A
Having the wheels and rims cleaned	N/A	65%
Having the tires shined	N/A	51%
Having the exterior polished	N/A	55%
Having the interior cleaned	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
Total	N=828	N=667
Having a wax or paint protectant applied	44%	49% a
Having the interior vacuumed for me	47%	49%
Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)	44%	N/A
Having the underbody of the vehicle cleaned	33%	40% A
Having the wheels specially cleaned	29%	N/A
Getting my tires dressed or shined	25%	N/A
Having the vehicle hand towel dried	24%	30% A
Being able to vacuum the interior myself	13%	21% A
Having a fragrance added to the interior	11%	16% A
Having the exterior polished	N/A	39%
Having the interior cleaned	N/A	45%
Having the wheels and rims cleaned	N/A	35%
Having the tires shined	N/A	33%
None of the above	16% 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
Total	N=828	N=667
Washing a car at a car wash is less work than washing a car at home	93%	93%
Washing a car at a car wash is faster than washing a car at home	90%	93% A
Washing a car at a car wash is more convenient than washing a car at home	88%	89%
Washing a car at a car wash is more enjoyable than washing a car at home	76%	86% A
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	59%	75% A
Washing a car at a car wash is safer for the environment than washing a car at home	54%	71% A
Washing a car at a car wash is a better overall value than washing a car at home	54%	69% A
Washing a car at a car wash is safer for the car than washing a car at home	34%	49% A
Washing a car at a car wash costs less than washing a car at home	32%	45% A
Washing at a car wash uses less water than washing a car at home	N/A	71%

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
Total	N=828	N=667
I recycle	78%	83% A
I purchase environmentally friendly products, even if they cost a bit more	36%	45% A
It's important that I understand the carbon footprint of my purchase decisions	26%	36% A
None of the above	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
Total	N=828	N=667
Yes	10%	15% A
No	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.

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

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

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



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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.

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

Gender

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

	2014 PRO and DIY A	2016 PRO and DIY B
Total	N=491	N=615
Less than 2,500	5%	9% A
2,501-5,000	15%	13%
5,001-10,000	26%	24%
10,001-15,000	26%	29%
15,001-25,000	17%	16%
More than 25,000	7% B	3%
I don't know	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
Total	N=491	N=615
Full	40%	45% a
Exterior	48%	48%
Stationary	47%	48%
Hand	22%	32% A
Self	47%	54% A
DIY	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
Total	N=491	N=615
Full	13%	17% A
Exterior	17%	15%
Stationary	14%	14%
Hand	2%	4% A
Self	18% b	14%
DIY	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
Total	N=491	N=615
Washing a vehicle is an important and necessary part of routine maintenance	64%	73% A
Washing a vehicle is a discretionary purchase, but something that I like to have done	26% b	21%
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	9% b	6%

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

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

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
Total	N=491	N=615
Cleanliness (the vehicle is clean, all dirt has been removed)	91%	95% A
Dryness (the vehicle is dry, there is no water or soap remaining)	67%	76% A
Shininess (the vehicle is shiny and bright)	71%	80% A
Speed (I can get in and out quickly)	59%	77% A
Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)	62%	82% A
Price (it is a good value)	85%	90% A
Hours of operation (the car wash is open when I want a wash)	N/A	72%
Human interaction (there is an employee who greets you and personally takes your payment)	N/A	30%
Self-service (a touch screen or pay station takes your payment)	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
Total	N=491	N=615
Having the underbody of the vehicle cleaned	48%	63% A
Having a wax or paint protectant applied	44%	59% A
Having the interior vacuumed for me	38%	44% A
Having the wheels specially cleaned	41%	N/A
Having the vehicle hand towel dried	38%	46% A
Getting my tires dressed or shined	35%	N/A
Being able to vacuum the interior myself	39%	52% A
Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)	27%	N/A
Having a fragrance added to the interior	15%	33% A
Having the wheels and rims cleaned	N/A	68%
Having the tires shined	N/A	50%
Having the exterior polished	N/A	58%
Having the interior cleaned	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.

Which of the following additional services at a car wash is WORTH PAYING MORE FOR? Top 2 Boxes	2014 PRO and DIY A	2016 PRO and DIY B
Total	N=491	N=615
Having the underbody of the vehicle cleaned	37%	45% A
Having a wax or paint protectant applied	49%	55% A
Having the interior vacuumed for me	37%	42% a
Having the wheels specially cleaned	35%	N/A
Having the vehicle hand towel dried	28%	31%
Getting my tires dressed or shined	28%	N/A
Being able to vacuum the interior myself	15%	22% A
Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)	45%	N/A
Having a fragrance added to the interior	12%	20% A
Having the wheels and rims cleaned	N/A	41%
Having the tires shined	N/A	30%
Having the exterior polished	N/A	42%
Having the interior cleaned	N/A	42%
None of the above	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
Total	N=491	N=615
Washing a car at a car wash is less work than washing a car at home	90%	90%
Washing a car at a car wash is faster than washing a car at home	87%	89%
Washing a car at a car wash is more convenient than washing a car at home	71%	81% A
Washing a car at a car wash is more enjoyable than washing a car at home	54%	67% A
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	36%	60% A
Washing a car at a car wash is safer for the environment than washing a car at home	35%	56% A
Washing a car at a car wash is a better overall value than washing a car at home	22%	47% A
Washing a car at a car wash is safer for the car than washing a car at home	13%	35% A
Washing a car at a car wash costs less than washing a car at home	13%	32% A
Washing a car at a car wash uses less water than washing a car at home	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
Total	N=491	N=615
I recycle	85%	84%
I purchase environmentally friendly products, even if they cost a bit more	42%	46%
It's important that I understand the carbon footprint of my purchase decisions	32%	41% A
None of the above	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
Total	N=491	N=615
Yes	6%	11% A
No	94% 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
Total	N=31	N=68
Email	65% b	47%
Facebook	13%	43% A
Car wash website	3%	41% A
Groupon	23%	24%
LivingSocial	10%	15%
Coupons.com	6%	21% A
Banner ad on a website	0%	18% A
I can't remember	6%	1%
Twitter	0%	32% A
Other coupon app or website	0%	4% a
Coupon bloggers	6%	16%
Search engine (Google/Yahoo/Bing)	0%	29% A
SmartSource.com	3%	18% A
Other (please specify)	0%	15% A

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
Total	N=31	N=68
Email	65% B	37%
Facebook	13%	29% a
Groupon	19%	15%
Car wash website	0%	34% A
I can't remember	6%	1%
Coupons.com	3%	13% a
Coupon bloggers	3%	6%
LivingSocial	0%	10% A
Twitter	0%	24% A
SmartSource.com	0%	15% A
Other coupon app or website	0%	1%
Search Engine (Google/Yahoo/Bing)	0%	19% A
Banner ad on a website	0%	9% A
Other (please specify)	0%	6% A
I have not used any coupons or promotional offers from car washes.	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.

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

Gender

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

	2014 DIY Only A	2016 DIY Only B
Total	N=275	N=252
Less than 2,500	13%	20% A
2,501-5,000	13%	14%
5,001-10,000	24%	25%
10,001-15,000	26% B	17%
15,001-25,000	11%	10%
More than 25,000	4%	4%
I don't know	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
Total	N=275	N=252
Washing a vehicle is an important and necessary part of routine maintenance	58%	60%
Washing a vehicle is a discretionary purchase, but something that I like to have done	15%	23% A
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	27% 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
Total	N=275	N=252
Washing a car at a car wash is less work than washing a car at home	76%	77%
Washing a car at a car wash is faster than washing a car at home	68%	65%
Washing a car at a car wash is more convenient than washing a car at home	45%	43%
Washing a car at a car wash is more enjoyable than washing a car at home	31%	33%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	23%	25%
Washing a car at a car wash is safer for the environment than washing a car at home	16%	19%
Washing a car at a car wash is a better overall value than washing a car at home	14%	16%
Washing a car at a car wash is safer for the car than washing a car at home	11%	13%
Washing a car at a car wash costs less than washing a car at home	11%	14%
Washing at a car wash uses less water than washing a car at home	N/A	32%

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

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

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

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

Gender

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

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

Which statement do you most agree with?	2014 NON Washers A	2016 NON Washers B
Total	N=81	N=72
Washing a vehicle is an important and necessary part of routine maintenance	11%	15%
Washing a vehicle is a discretionary purchase, but something that I like to have done	15%	21%
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	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
Total	N=81	N=72
Washing a car at a car wash is less work than washing a car at home	91%	82%
Washing a car at a car wash is faster than washing a car at home	88%	82%
Washing a car at a car wash is more convenient than washing a car at home	64%	69%
Washing a car at a car wash is more enjoyable than washing a car at home	58%	63%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	51%	53%
Washing a car at a car wash is safer for the environment than washing a car at home	26%	28%
Washing a car at a car wash is a better overall value than washing a car at home	25%	32%
Washing a car at a car wash is safer for the car than washing a car at home	15%	17%
Washing a car at a car wash costs less than washing a car at home	6%	15% ^a

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

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
Total	N=81	N=72
I recycle	68%	68%
I purchase environmentally friendly products, even if they cost a bit more	16%	18%
It's important that I understand the carbon footprint of my purchase decisions	9%	21% A
None of the above	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.

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

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

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

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

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

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

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

Age

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

Household Income

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

Marital Status

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

Race or Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

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



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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.

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

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

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

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

On average, how much do you pay per wash (not including additional services)?	2016 PRO
Total	N= 1281
\$1-\$5	20%
\$6-\$10	44%
\$11-\$15	20%
\$16-\$20	8%
\$21-\$25	4%
\$26-\$30	2%
\$31-\$35	1%
\$36 or more	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
Total	N=1281
Interior vacuuming (self-service)	49%
Wax or paint protectant	48%
Wheel/rim cleaning	41%
Interior cleaning	41%
Interior vacuuming (done by someone else for me)	38%
Underbody cleaning (of vehicle)	38%
Tire shining	38%
Vehicle hand/towel drying	38%
Exterior polishing	35%
Interior fragrances/air freshener	29%
Other, please specify	1%
None of the above	15%

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

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



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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

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

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

Still thinking about the car wash you use most often, what made you go there the first time?	2016 PRO
Total	N=1281
I could get gas or do other shopping	17%
The interior waiting area was clean	15%
The wash process was fun to watch	14%
There were snacks or beverages for sale	11%
They recycled the wash water	11%
They seemed to use less water than other car washes	10%
My kids said they'd enjoy it	9%
They offered a free exterior re-wash if it rains/snows within 5 days	9%
They used soap that is safe for the environment	9%
They offered free coffee, tea or water while I waited	8%
They offered a monthly unlimited washing program/subscription	6%
I saw that the car wash was involved in the community	6%
Other, please specify	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 INSTEAD OF washing your vehicle at home? Top 2 Boxes	2016 DIY ONLY
Total	N=252
If it was less expensive	58%
If it was a good value	49%
If the car would look great when they're done	41%
if it was convenient	40%
If I could trust that my car would be safe	40%
If they offered discounts and coupons	39%
If the lines were not too long	33%
If the employees were friendly and professional	31%
If I would feel personally safe when I am there	31%
If the car wash was clean and inviting	29%
If they offered a free exterior re-wash if it rains/snows within 5 days	27%
If the interior waiting area was clean	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 INSTEAD OF washing your vehicle at home? Top 2 Boxes	2016 DIY ONLY
Total	N=252
If I could sit inside the car when it goes through the wash	27%
If the wash process was fun to experience or watch	23%
If they used soap that is safe for the environment	22%
If they used less water than washing at home	21%
If they offered a monthly unlimited washing program/subscription	20%
If I could get gas or do other shopping	19%
If they recycled the wash water	19%
If they offered free coffee, tea or water while I waited	18%
If they were involved in the community	17%
If someone else recommended it	16%
If my kids said they'd enjoy it	15%
If there were snacks or beverages for sale while I waited	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
Total	N=72
If it was cheap	39%
If it was a good value	33%
If they offered discounts and coupons	26%
If I could trust that my car would be safe	25%
If it was convenient	24%
If the lines were not too long	19%
If the car would look great when they're done	18%
If I would feel personally safe when I am there	18%
If they used an environmentally responsible amount of water	17%
If I could get gas or do other shopping	15%
If they offered a free exterior re-wash if it rains/snows within 5 days	15%
If they recycled the wash water	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
Total	N=72
If the employees were friendly and professional	14%
If the car wash was clean and inviting	14%
If the wash process was fun to experience or watch	14%
If the interior waiting area was clean	14%
If they used soap that is safe for the environment	13%
If they offered free coffee, tea or water while I waited	11%
If I could sit inside the car when it goes through the wash	11%
If there were snacks or beverages for sale while I waited	8%
If the car wash was involved in the community	8%
If my kids said they'd enjoy it	7%
If they offered a monthly unlimited washing program/subscription	6%
If someone else recommended it	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
Total	N=1281
If it was a good value	83%
If the car would look great when they're done	79%
If it was less expensive	75%
If it was more convenient	70%
If I could trust that my car would be safe	70%
If they offered discounts and coupons	69%
If the lines were not too long	68%
If I would feel personally safe when I am there	63%
If the car wash was clean and inviting	62%
If the employees were friendly and professional	61%
If they offered a free exterior re-wash if it rains/snows within 5 days	58%
If the interior waiting area was clean	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%).

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

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

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

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

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?	2016 Exterior Most Often
Total	N=252
I prefer to be greeted by an employee and pay them (or someone else) for the wash	27%
I prefer ordering the wash and paying through a touch-screen or pay station before entering the wash	33%
A combination of the above	15%
I don't have a preference	25%

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

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

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

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
My Favorite Grocery Store	66% (N=1281)
My Favorite Sit-Down Restaurant	58% (N=1279)
My Favorite Mass Retailer	45% (N=1277)
My Favorite Quick-Serve Restaurant	30% (N=1280)
My Favorite Car Wash	25% (N=1278)
My Favorite Gas Station	22% (N=1281)
My Favorite Bank	19% (N=1280)
My Favorite Home Improvement Store	16% (N=1276)
My Favorite Hair Salon or Barber	16% (N=1278)
My Favorite Dry Cleaner	3% (N=1273)

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

How satisfied are you with the price you pay per wash?	2016 PRO
Total	N= 1281
Bottom 2	17%
Very dissatisfied	3%
Somewhat dissatisfied	14%
Neither satisfied nor dissatisfied	21%
Somewhat satisfied	40%
Very satisfied	23%
Top 2	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
Total	N=358	N=252	N=216	N=69	N=167
Very dissatisfied	2%	3%	4%	1%	1%
Somewhat dissatisfied	9%	12%	18% Ab	17% a	16% A
Neither satisfied nor dissatisfied	15%	22% A	22% A	19%	22% A
Somewhat satisfied	44%	39%	38%	35%	40%
Very satisfied	30% bCE	23%	19%	26%	20%



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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

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

How would you prefer to receive communications or promotional offers from car washes?	2016
Total	N= 1606
Email	48%
Regular mail	43%
Facebook	25%
Local coupon mailing (e.g., Valpak, xyz, etc.)	23%
Newspaper ad	19%
Car wash website	15%
Groupon	13%
Coupons.com	10%
Twitter	9%
Search Engine (Google/Yahoo/Bing)	9%
LivingSocial	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
Total	N=1606
Banner ad on a website	4%
SmartSource.com	3%
Coupon bloggers	3%
Instagram	3%
Pinterest	3%
Other coupon app or website	3%
Snapchat	2%
Waze	1%
Other (please specify)	1%
I do not want to receive communications or promotional offers from car washes	18%

62% said they would prefer to receive communications or offers for car washes from coupon bloggers 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
Coupon bloggers	62%
Snapchat	53%
Waze	53%
Pinterest	52%
SmartSource.com	43%
Instagram	43%
Twitter	41%
LivingSocial	40%
Banner ad on a website	39%
Other coupon app or website	39%
Search Engine (Google/Yahoo/Bing)	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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Detailed Findings: 2016 New Questions

Car Wash Usage

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Monthly Unlimited Wash Programs

Washing Vehicles with Safety Features

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

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

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

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

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

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

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

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

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?	2016
Member of Monthly Unlimited Washing Program	N=99
1 time	10%
2 times	21%
3 times	25%
4 times	21%
5 times	14%
6 or more times	9%

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

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

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

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

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

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

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



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Detailed Findings: 2016 New Questions

Car Wash Usage
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Washing Vehicles with Safety Features

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

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

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

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

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

	2014 A	2016 B
Total	N=1675	N=1606
Male	48%	48%
Female	52%	52%

Age

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

Household Income

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

Marital Status

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

Ethnicity

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

Education

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

Employment

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

Regionality

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

Age of Vehicle

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

Driving Miles Per Year

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