

2017 European Car Wash Consumer Study



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INTERNATIONAL CARWASH ASSOCIATION®
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International Carwash Association
European Car Wash Consumer Study

Dear Reader,

Welcome to the 2017 European Car Wash Consumer Study, produced by the International Carwash Association. This report represents the first time that ICA has embarked upon a study of the European market, and we believe it to be the most comprehensive evaluation of car wash customers from across the continent ever attempted.

Based upon input from car wash operators and suppliers, we selected France, Germany, Italy, the Netherlands, Poland, and Sweden as the focus of this study. Thanks to a format that is similar to a study that the ICA has been conducting in the U.S. since the mid-1990s, we are able to make unique comparisons between the American and European markets. This report is a summary of the full study, which contains more than five-hundred pages of data and analysis.

The car wash industry has become truly global, and it is our hope that this study becomes a valuable tool for helping car wash owner-operators discover new ideas, innovations, and opportunities. We also hope that this study sparks conversations and network-building across our growing industry. Once these hopes become reality, then the true purpose of our association will be realized.

Sincerely,
Eric Wulf, Chief Executive Officer
International Carwash Association, Inc.

METHODOLOGY



Quantitative Study

Online survey fielded May 1-4, 2017

1,806 respondents from the following countries:

- France, Germany, Italy, the Netherlands, Poland, and Sweden
- Had to own, lease, or have a company-provided vehicle

Key Areas of Learning

Incidence:

How has the mix of home versus 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?

Issues & Opportunities:

How might differences between countries help to unearth new opportunities for growth?

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 lowercase letters**, calculated at the 90% confidence level.
- Due to rounding, not all columns will add up to 100%.
- Please note that some charts have smaller sample sizes, which means the data are relatively unstable compared to data with larger sample sizes. Please use with caution.
- Finally, some questions allowed respondents to choose more than one answer. Therefore, these percentages will not equal 100%.

STATE OF THE CAR WASH INDUSTRY

Washing a vehicle is a universal activity among the six European countries surveyed: France, Germany, Italy, the Netherlands, Poland and Sweden. Over 90% of respondents in every country said that they washed their vehicle at least once in the past year.

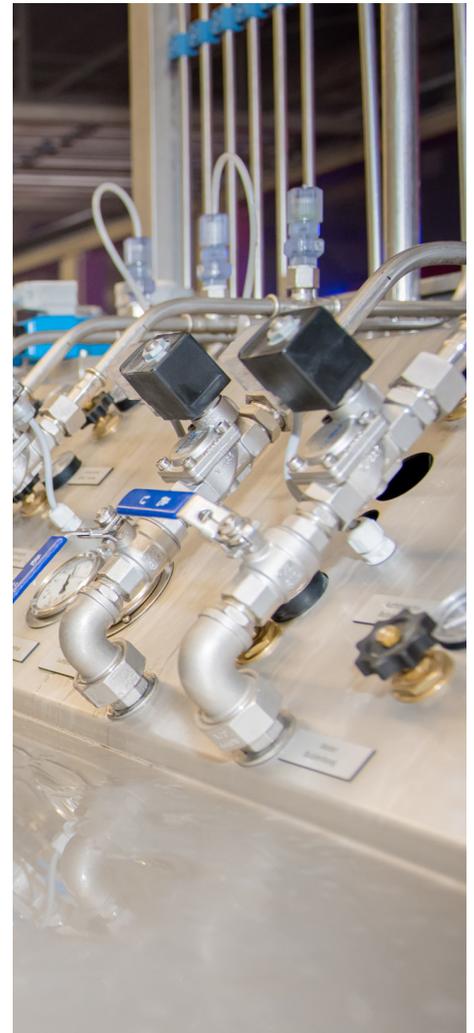
Not only did the majority of respondents wash their vehicle in the past year; 85% of them also used a car wash at least once in the past year.

Of those who washed their car at a car wash in the past year, 74% washed exclusively at a professional car wash (“PRO Only” in chart below), while only 16% washed both at home and at a car wash (“PRO + DIY” in chart below).

There is a huge base of loyal professional car washers among the European countries surveyed, and this base is even more striking when compared to the United States. Only 44% of those who’ve washed their vehicle in the past year in the United States washed exclusively at a professional car wash. Among the six European countries surveyed, 74% washed exclusively at a professional car wash.

Which of the following have you done in the past year to wash your vehicle?	Europe (6-country total)* A	United States B
Total	N=1806	N=1606
PRO Only (only washed at car wash)	74% B	44%
PRO + DIY (washed both at home and at car wash)	16%	40% A
DIY Only (only washed at home)	10%	16% A

* In this report, “Europe” and “six-country total” both refer to the summation of the data collected from the six countries surveyed: France, Germany, Italy, the Netherlands, Poland, and Sweden.





Even among those who have washed both at home and at a professional car wash in the past year, there is a significantly greater percentage of consumers who use car washes more often than washing at home. 81% of washers in Europe wash at a professional car wash most often (“PRO Most Often” in chart), compared to just 66% of washers in the United States.

Which of the following have you done in the past year to wash your vehicle?	Europe (6-country total) A	United States B
Total	N=1806	N=1606
PRO Most Often (washed at a car wash most often)	81% B	66%*
DIY Most Often (washed at home most often)	14%	29%* A

*In the 2016 US Car Wash Consumer Study, PRO Most Often and DIY Most Often numbers are slightly different due to dividing by the total number of washers in the US. In this chart, we divide by the total number of respondents sampled (non-washers and washers).

The mass consumer base of professional car wash users in Europe is largely driven by their beliefs that the benefits of using a professional car wash are greater than washing at home. Compared to the United States, PRO washers in Europe are more likely to agree that washing a vehicle at a car wash provides better benefits over washing at home.

Please indicate whether you agree or disagree with each of the following statements:	Europe (6-country total) A	United States B
Total	N=1806	N=1606
Washing a car at a car wash is less work than washing a car at home	86%	89% A
Washing a car at a car wash is faster than washing a car at home	85%	86%
Washing a car at a car wash is more convenient than washing a car at home	83% B	78%
Washing a car at a car wash is safer for the environment than washing a car at home	70% B	55%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	66% B	60%
Washing a car at a car wash uses less water than washing a car at home	62% b	59%
Washing a car at a car wash is a better overall value than washing a car at home	58% B	51%
Washing a car at a car wash is safer for the car than washing a car at home	51% B	37%
Washing a car at a car wash costs less than washing a car at home	41% B	34%

EMERGING OPPORTUNITIES

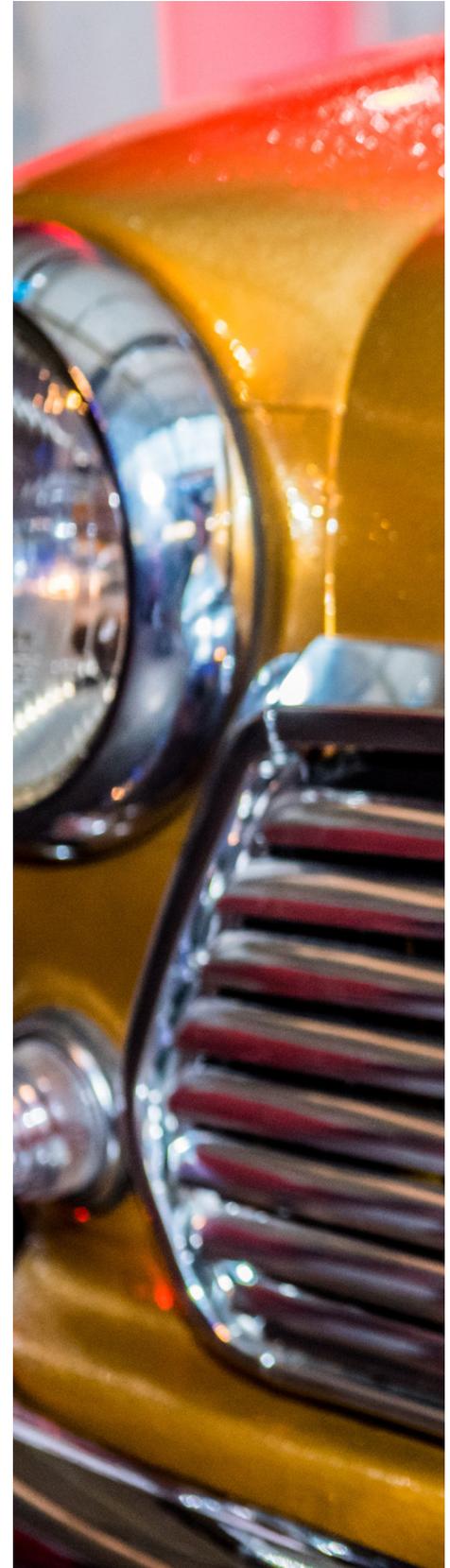
While there is a large consumer base of professional car wash users in Europe, how frequently they wash at a car wash is low—particularly when compared to the United States.

27% of PRO washers in the United States wash their vehicles at a professional car wash a few times a month or more often compared to just 16% of PRO washers in Europe.

On average, how often do you wash your vehicle at a car wash?	Europe (6-country total) A	United States B
Total	N=1539	N=1281
Only once a year	5%	4%
Every six months or so	17% B	12%
Every couple of months	33%	32%
Once a month	30% B	26%
A few times a month	13%	21% A
Once a week or more often	3%	6% A

Average number of washes per year among PRO washers	Europe (6-country total) A	United States B
Total	N=1539	N=1281
Average number of washes per year	10.5	13.6

Based upon this reported frequency of washing at a car wash, the estimated average number of washes per PRO washer in Europe is 10.5 washes compared to 13.6 in the United States.



While increasing frequency of washing is one way to increase revenue and profitability, unlimited wash programs are another avenue for growth.

The unlimited wash program offering is already attracting attention from PRO washers in Europe. We see that many who say that they are aware of an unlimited wash program at the car wash that they visit are already members. Only 21% of all PRO washers in Europe say they are aware of a program like this, but among that small group, 60% say they are members. Once a PRO washer in Europe becomes aware of these types of programs they recognize the value of such a membership and sign up. Driving further awareness could greatly increase membership to unlimited wash programs.

In addition, these programs are highly profitable due to the underutilization of their memberships by members. Currently, unlimited wash program members report visiting the car wash where they are a member only 1-3 times a month. Unlimited wash programs are generating greater profitability with minimal increase in actual vehicle washes.

Car wash owners and operators can increase frequency of washing and awareness of unlimited wash programs by increasing their investment in digital marketing.

Only 15% of all respondents received an online communication or offer from a car wash in the past year. This is a profoundly missed opportunity for the car wash industry.

Email and Facebook had the highest rates of car wash offers received and redeemed in the past year. These two platforms may be a good place to start sending offers or communications online and to reach consumers if car wash owners and operators haven't done so already.

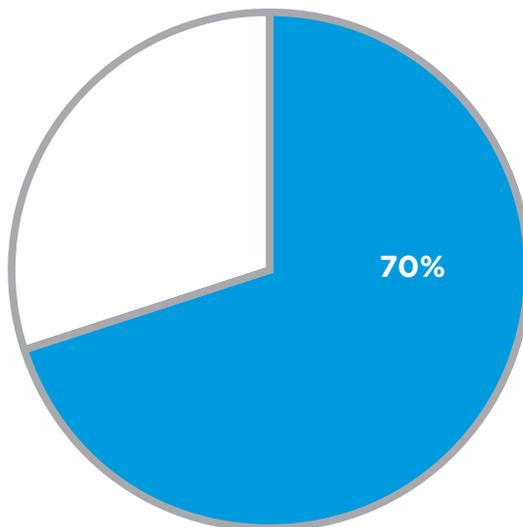
How have you received online communications or offers from car washes? Have you used any coupons or offers from any of the following in the past year?	Europe (6-country total) Received	Europe (6-country total) Used
Total	N=269	N=244
Email	47%	29%
Facebook	49%	34%
Car wash website	29%	20%
Banner ad on a website	23%	9%
Twitter	27%	19%
Search engine (Google/Yahoo/Bing)	27%	16%
WhatsApp	12%	6%
Once a month	30% B	26%
A few times a month	13%	21% A
Once a week or more often	3%	6% A

One of the biggest areas of opportunity for car wash owners and operators in Europe is speaking to the environmentally-friendly practices of their business.

PRO washers in the six European countries surveyed care greatly about whether car washes are taking action to reduce their environmental impact. This concern is even greater for PRO washers in Europe than for PRO washers in the United States. 70% believe that washing a car at a car wash is safer for the environment than washing at home. Only 55% of PRO washers in the United States agree with this statement. In addition, 53% of PRO washers in Europe agree that they use a car wash, because it is safer for the environment than washing at home.

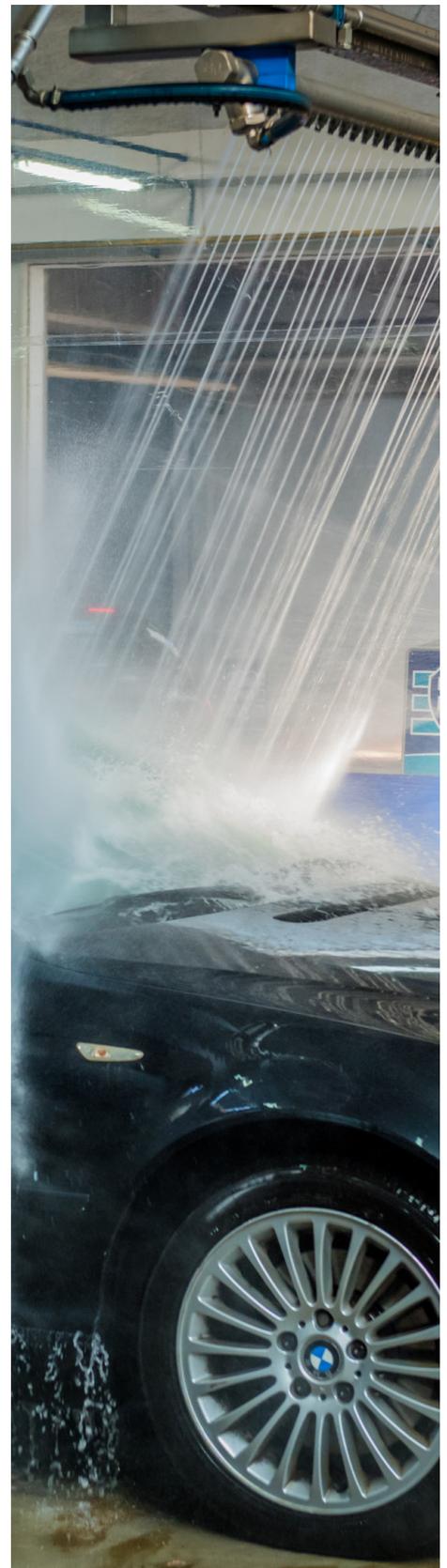
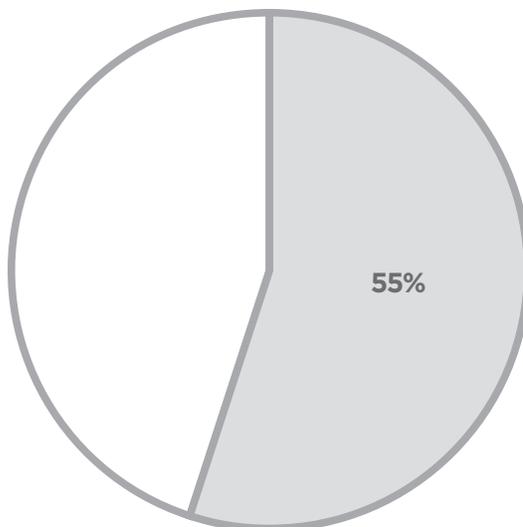
Europe

70% believe that washing a car at a car wash is safer for the environment than washing at home.



United States

55% believe that washing a car at a car wash is safer for the environment than washing at home.



COUNTRY-SPECIFIC DIFFERENCES



Washing Behavior by Country

Washing your vehicle is universally done among the six countries that were surveyed; however, there are distinct differences between countries regarding how people choose to wash their vehicles.

Poland reported the highest percentage of those who have washed their vehicle in the past year at 98%. Poland also has the highest percentage of switchers. Switchers are those who switch between using a car wash and washing their vehicle at home (“PRO + DIY” in chart).

Germany has the highest percentage of those who have only washed their vehicles at a professional car wash (“PRO Only” in chart) while the Netherlands have the lowest percentage of PRO only washers. However, the Netherlands also have the highest percentage of those who have only washed their vehicle at home in the past year, with 21% of only at-home washers (“DIY Only” in chart).

	6-Country Total A	France B	Germany C	Italy D	Netherlands E	Poland F	Sweden G
Total	N=1806	N=301	N=300	N=301	N=303	N=301	N=300
PRO Only	70% E	68% E	83% ABDEFG	76% AE	58%	67% E	68% E
PRO + DIY	15% C	14% C	9%	16% C	13%	26% ABCDEG	14%
DIY Only	9% CDF	11% CDF	4%	5%	21% ABCDFG	4%	11% CDF
NON	5% F	8% CDF	4%	4%	8% aCDF	2%	7% cDF



The chart below details the major behavioral and attitudinal differences between each of the six countries surveyed in the 2017 European Car Wash Consumer Study.

	France	Germany	Italy	Netherlands	Poland	Sweden
Highest concentration of PRO Only washers		X				
Highest concentration of DIY Only washers				X		
Highest concentration of PRO + DIY washers					X	
High belief in importance and necessity of washing			X		X	
Low belief in the importance and necessity of washing		X		X		
High belief in benefits of using a PRO wash			X		X	
Low belief in benefits of using a PRO wash				X		
Influenced to wash more often if environmentally safe/friendly	X					
Highest concentration of unlimited wash program members						X
Highest % who received online car wash offer/communication						X



CAR WASH TYPE MOST OFTEN USED SEGMENTATION IN EUROPE



Full-Service Most Often: Used a full-service car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle on the outside and the interior is cleaned manually

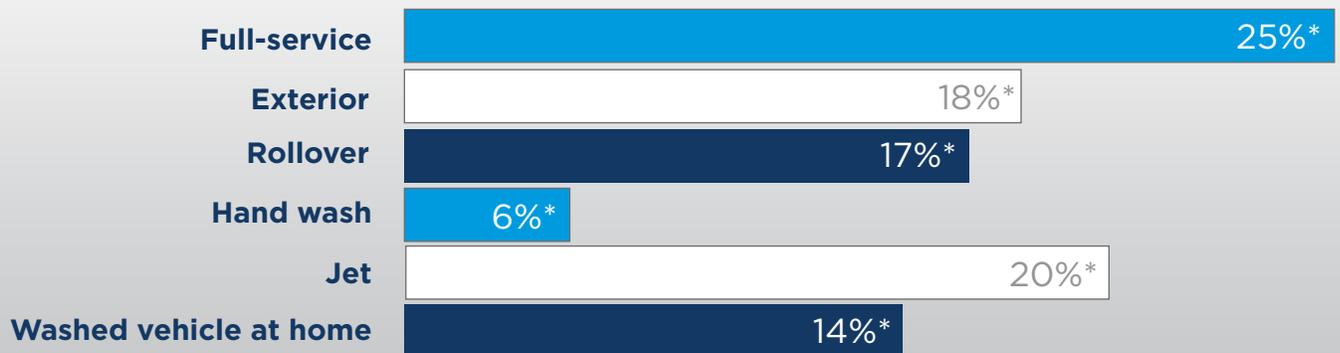
Exterior Most Often: Used a car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle on the outside and the interior is not manually cleaned

Rollover Most Often: Used a rollover car wash in which the vehicle is stationary as the machine moves around the vehicle

Hand Wash Most Often: Used a car wash where employees clean the vehicle by hand

Jet Most Often: Used a jet car wash (do-it-yourself with a spray wand)

Which one of the following do you use most often to wash your vehicle?



*All respondents in Europe who used a car wash at least once in the past year (n=1,709).



Frequency of washing at a car wash

In Europe, full-service car wash users wash their vehicles at a car wash most often, while jet car wash users wash their vehicle at a car wash least often.

	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Once a year	5%	5%	4%	6%	10% AbCE
Every six months or so	13%	21% AE	20% AE	16%	25% AE
Every couple of months	26%	34% AD	43% AbDE	25%	35%
Once a month	32% C	29%	24%	33% c	26%
A few times a month	20% BCE	10%	9% f	14%	3%
Once a week or more often	5% BCE	1%	2%	5% Bce	1%

Washing attitudes

Full-service and hand car wash users in Europe agree significantly more that washing a vehicle is an important and necessary part of routine maintenance. Exterior and rollover car wash users in Europe are more likely to say that washing a vehicle is a discretionary purchase.

	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Washing a vehicle is an important and necessary part of routine maintenance	73% BCE	54%	59%	70% BCe	60%
Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me	20%	34% ADE	28% A	22%	25%
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	7%	12% A	13% A	8%	15% A

Washing at a car wash versus washing at home

European consumers who use full-service and hand car washes strongly believe in the many benefits of using a car wash over washing their vehicles at home. However, all professional car wash users in Europe believe that washing at a car wash is faster, more convenient, and less work.

Washing at a car wash is _____ than washing a car at home	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO washers	N=434	N=302	N=288	N=97	N=341
Washing at a car wash is safer for the environment than washing at home	77%	76%	74%	79%	79%
Washing at a car wash uses less water than washing at home	72% bCE	66%	61%	75% bCE	64%
Washing at a car wash is less work than washing at home	88%	87%	88%	84%	87%
Washing at a car wash is more enjoyable than washing at home	76% bDE	70%	77% BDE	62%	68%
Washing at a car wash is safer for the car than washing at home	67% BCE	52%	52%	63% bc	54%
Washing at a car wash provides a better overall quality of wash than washing at home	79% BCE	72% C	64%	82% BCE	70%
Washing at a car wash is a better overall value than washing at home	70% Ce	65% c	57%	71% C	64%
Washing at a car wash costs less than washing a car at home	55% CE	49% CE	35%	46% C	40%
Washing at a car wash is faster than washing a car at home	85%	84% AE	88%	89%	90%
Washing at a car wash is more convenient than washing a car at home	89%	86%	88%	91%	89%



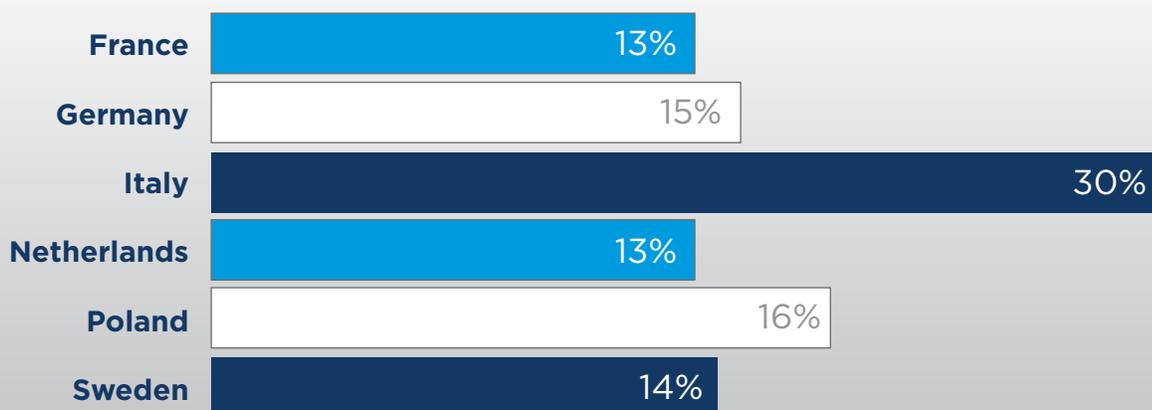
Full-service most often (25%)

Full-service car wash users are true fanatics of the car wash experience. They most strongly believe in the many rational and emotional benefits that washing at a car wash provides over an at-home car wash. In addition, 73% of full-service car wash users say that washing a vehicle is an important and necessary part of routine maintenance. (See page 13 for data chart.) This is the highest level of agreement among all the types of car wash users.

Key washing attitudes	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Washing at a car wash uses less water than washing at home	72% bCE	66%	61%	75% bCE	64%
Washing at a car wash is safer for the car than washing at home	76% bDE	70%	77% BDE	62%	68%
Washing at a car wash provides a better overall quality of wash than washing at home	67% BCE	52%	52%	63% bc	54%
Washing at a car wash is a better overall value than washing at home	79% BCE	72% C	64%	82% BCE	70%
Washing at a car wash costs less money than washing at home	70% Ce	65% c	57%	71% C	64%
Washing at a car wash costs less than washing a car at home	55% CE	49% CE	35%	46% C	40%

Car Wash Most Often Used: Full-Service

Full-service car washes are most popular in Italy.



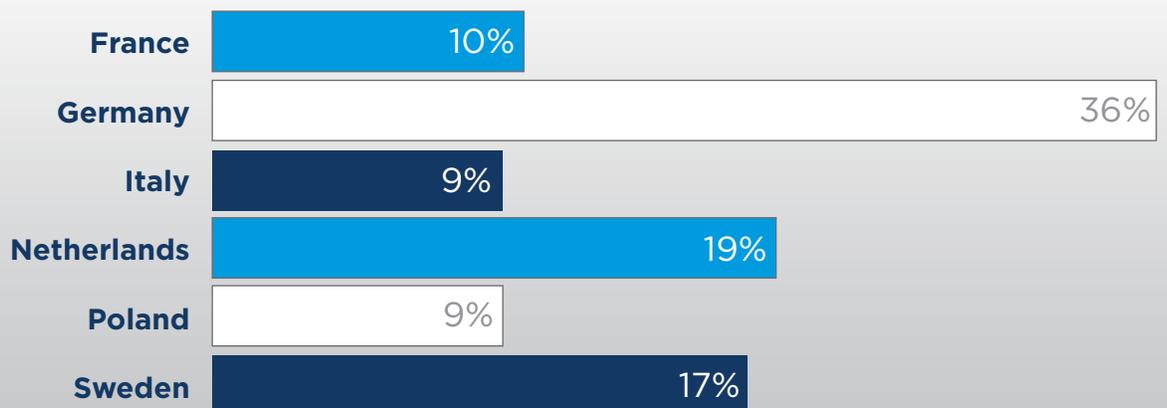
Exterior most often (18%)

Exterior car wash users believe that washing at a car wash provides a better overall quality of wash and costs less than washing at home. However, even though this group of car wash users believe that a car wash provides value, only 54% believe that washing a vehicle is an important and necessary part of routine maintenance. This is the lowest of any group of car wash users. (See page 13 for data chart.)

Key washing attitudes	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Washing at a car wash provides a better overall quality of wash than washing at home	79% BCE	72% C	64%	82% BCE	70%
Washing at a car wash is a better overall value than washing at home	70% Ce	65% c	57%	71% C	64%
Washing at a car wash costs less than washing a car at home	55% CE	49% CE	35%	46% C	40%

Car Wash Most Often Used: Exterior

Exterior car washes are most popular in Germany.



Rollover most often (17%)

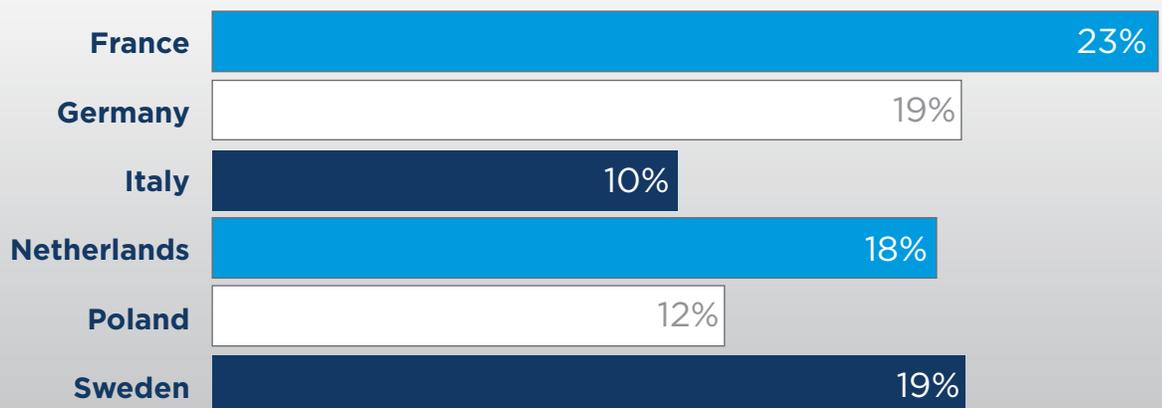
Rollover car wash users believe the process of washing a vehicle at a car wash is a pleasant experience. Not only do they agree that washing a vehicle at a car wash is less work than washing at home, but they believe it is also more enjoyable.

While they may find washing at a car wash more enjoyable and less work, 67% of rollover car wash users reported washing their car at a car wash every couple of months or less often. (See page 13 for data chart.) They also were more likely than other types of car wash users to agree that washing a vehicle is a discretionary purchase or is something that is not that important. (See page 13 for data chart.)

Key washing attitudes	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Washing at a car wash is less work than washing at home	88%	87%	88%	84%	87%
Washing at a car wash is more enjoyable than washing at home	76% ^{bDE}	70%	77% ^{BDE}	62%	68%

Car Wash Most Often Used: Rollover

Rollover car washes are most popular in France, but are also used in Germany, Sweden and the Netherlands.



Hand wash most often (6%)

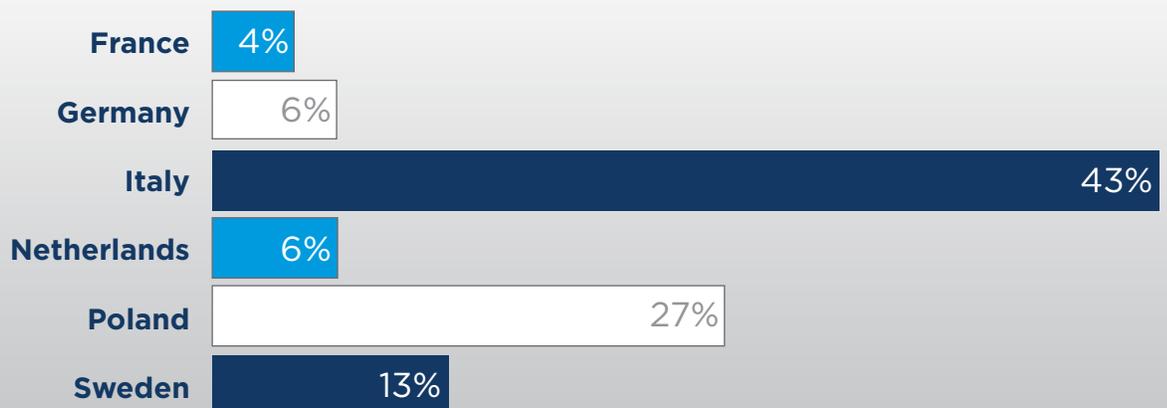
Hand wash users believe in the quality of service that comes from using a car wash. They believe that a car wash uses less water, is safer for the car, is a better overall quality of wash, and is a better overall value than washing at home.

They also strongly believe in the importance of washing a vehicle. 70% of hand wash users agree that washing a vehicle is an important and necessary part of routine maintenance. (See page 13 for data chart.)

Key washing attitudes	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Washing at a car wash uses less water than washing at home	72% bCE	66%	61%	75% bCE	64%
Washing at a car wash is safer for the car than washing at home	67% BCE	52%	52%	63% bc	54%
Washing at a car wash provides a better overall quality of wash than washing at home	79% BCE	72% C	64%	82% BCE	70%
Washing at a car wash is a better overall value than washing at home	70% Ce	65% c	57%	71% C	64%

Car Wash Most Often Used: Hand Wash

Hand car washes are most popular in Italy. While not as popular as in Italy, hand car washes are also used often in Poland.



Jet most often (20%)

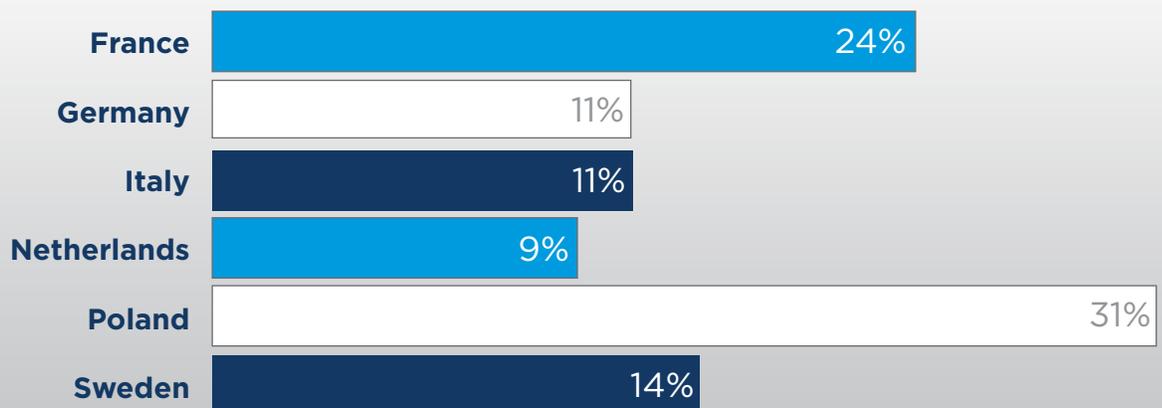
Jet car wash users are the group of car wash users who believe the least in the benefits of using a car wash over washing a vehicle at home. However, they strongly believe that washing a car at a car wash is less work and more convenient than washing a vehicle at home.

Not surprisingly, when it comes to using a car wash, jet car wash users are the most infrequent washers. 70% of jet car wash users reported washing their car every couple of months or less often. 35% reported washing their vehicle at a car wash only every six months or less often. (See page 13 for data chart.)

Key washing attitudes	Full-service A	Exterior B	Rollover C	Hand wash D	Jet E
European PRO Washers	N=434	N=302	N=288	N=97	N=341
Washing at a car wash is faster than washing a car at home	85%	84%	88%	89%	90%
Washing at a car wash is more convenient than washing a car at home	89%	86%	88%	91%	89%

Car Wash Most Often Used: Jet

Jet car washes are most popular in Poland, but are also used in France.





THANK YOU.



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