2002

Study of Consumer Car Washing Attitudes and Habits

The International Carwash Association

Dear Industry Professional,

Business owners face the challenge to meet and satisfy customers' evolving needs and wants. Understanding customers through their attitudes and behaviors should be a constant process in order to meet changing demands. The International Carwash Association recognizes this need, and the importance of collecting data that properly reflects the consumer's motivations, needs and preferences in purchasing decisions. This belief is reflected in the strategic plan of the International Carwash Association to be "the recognized source of accurate information for the professional car care industry." Our mission statement reinforces our commitment to "enhance the success of members and the car care industry by collecting and disseminating information and knowledge by stimulating and facilitating the exchange of thoughts and ideas."

The International Carwash Association's Study of Consumer Car Washing Attitudes and Habits was originally conducted in 1996, and has been completed every three years since. To provide comparative analysis to previous results, the 2002 questionnaire was based on the surveys used in 1996 and 1999. The evolution of this market research study has provided opportunities to collect new information. Of particular significance is the creation of "Consumer Market Segments" which groups survey participants by responses to a series of statements about their attitudes and behaviors. This addition allows us to gain a more comprehensive perspective of a consumer's buying behavior based upon influences of cultural, social, personal and psychological factors. Since customers are diverse in their buying requirements, this information allows us to segment an identifiable cluster within the entire market and profile a distinct group of buyers.

Understanding your marketing environment should provide you with a better understanding of your opportunities as well as your threats. Trends or major social, economic and technological changes that can have a lasting influence can identify many opportunities. In addition to the more detailed industry segment information, the key finding section is an important element that will allow you to see some of the most interesting data in the study.

We are pleased to present the results of the 2002 Study of Consumer Car Washing Attitudes and Habits, and find it encouraging that much of the data is confirmed based upon the previous studies. Changing the attitudes and habits of consumers takes time, and we were encouraged to see a continuous trend in a decline of our greatest competition – the home washer. With the confidence of our strategic plan, mission statement, and the consumer public relations program beginning in 2003, it is the intention of the International Carwash Association to conduct this study again in 2005.

If you have any questions about the contents of this report, please contact the International Carwash Association via www.carcarecentral.com or by email at ica@sba.com.

Sincerely,

Mark O. Thorsby, CAE
Executive Director
International Carwash Association

Methodology

Background

The objective of the 2002 Study of Consumer Car Washing Attitudes & Habits is three-fold: to collect and disseminate reliable information on car washers to the International Carwash Association (ICA) membership; to obtain knowledge about public perceptions regarding car washers so that an informational campaign could be established; and to collect information on the non-user and professional car washing's number one competitor, the home washer.

In previous years, ICA explored only car wash consumers' behavior and usage patterns, with limited attitudinal information. As a result of including additional attitudinal questions, ICA is now able to group respondents with distinct profiles of attitudes, behaviors, motives, needs, wants, outlooks, etc. Knowing the various types of mind-sets that exist can aid users of the 2002 report in designing effective marketing communications (e.g., advertising, promotions, information, events, etc.) for consumers that are like-minded about car washing.

In order to address our members' changing needs, questions were added to the questionnaire, which asked car wash customers to identify the primary vehicle that they drive and wash most often, how many miles they drive per week and how much they typically spend on car washing. These questions were used as a tool to assess whether customers tend to select particular types of car wash services based on the type of vehicle they drive most often, how often they use their vehicle and how much they are willing to spend to have their vehicle cleaned.

The information presented in this report is intended to provide members with a further understanding of the car wash user and to give insight into the preferences and perceptions of non-users. It is the goal of this report to provide a compelling strategic marketing tool, not just "nice-to-know" information.

Sampling

Two questionnaires were developed in order to collect sufficient data concerning car washing behaviors, usage and attitudes. The first survey, an eight-question mini-survey, was sent to 20,000 households in January. The sample was balanced to reflect the population of the United States in terms of household income, geographic region, population density, head of household age and household size. This mini survey was used as a tool to determine who would be eligible (i.e., households that own or lease at least one car) to receive the follow-up, more detailed survey. ICA received 12,255 responses to the mini-survey, which represents a 61.3 percent response rate.

In March, ICA mailed an eight-page consumer questionnaire to a random sample of 4,900 eligible households identified from the mini-survey. This sample of households was also balanced to reflect the population of the United States in the same manner as the mini-survey population. A total of 3,649 completed surveys were returned which represents a 74.5 percent response rate.

Statistical tests for reliability show that a sample of this size gives an estimated ±5 percent margin of error at a 95 percent confidence level. In other words, we can be 95 percent confident that a census of all owners or leasers would reveal results within ±5 percentage points of the overall results shown in this report. In addition, please note, as the sample size decreases for a given region within a customer segment, the error rate increases. Such circumstances where we have insufficient data are indicated with an asterisk ("✻").

For the detailed questionnaire, respondents were asked to indicate which specific type of car wash they *use most often*.
The respondent base, or number of responses within each customer segment for the 1996, 1999 and 2002 study year's is as follows:

Customer Segment	2002 Study Base - (n)	1999 Study Base - (n)	1996 Study Base - (n)
Home washers	1,414	1,369	1,458
Full-service customers	596	511	530
Exterior customers	402	357	322
Stationary automatic customers	417	391	346
Self-service customers	458	419	508
Charity customers	25	30	18
No Answer	337	290	214
TOTAL Number of Surveys Returned	3,649	3,367	3,396

Methodology

Sampling – continued

Each specific type of car wash or consumer segment, excluding charity car washing, was analyzed against the results of the questionnaire. Charity customers were not included as a customer segment due to their small respondent base. Also note, slightly over 300 respondents did not indicate what wash type they *use most often* in 2002. Please note that data shown for each customer segment is not weighted.

How To Read This Report

The *2002 Study of Consumer Car Washing Attitudes and Habits* is divided into eight key sections:

- Key Findings
- Demographics
- Customer Profiles
- Home Washer Results
- Full-service Customer Results
- Exterior Customer Results
- Stationary Automatic Customer Results
- Self-service Customer Results

The *Key Findings* section gives an overview of significant highlights in this year's study. The *Demographics* and *Customer Profiles* sections show the demographic make-up, washing attitudes and habits of respondents. Following these sections are the detailed results for the five different consumer segments, based on which type of wash a respondent indicated they *use most often*. Within these sections, results are shown overall and regionally (refer to the regional map on page 13). In addition, these sections include "new information" which highlight new findings from questions that were either not asked on the 1996 and 1999 surveys or compares the results between study years (i.e., 2002, 1999 and 1996) when possible.

The following statistics are shown in the report:

- <u>Means</u> are derived by adding all values and dividing the total number of responses; the average. Means are weighted unless stated otherwise.

- The <u>median</u> (50^{th} Percentile) is obtained by finding the value below which 50% of the responses lie when the values are arranged in order of magnitude.

- <u>Percentages</u> are derived by dividing the number of responses per category by the total number of the responses to the survey. Percentages presented in graphs are shown in whole percents and percentages shown in the tables are rounded to the first decimal. It is important to note that some questions allowed respondents to choose more than one answer and therefore these percentages will not equal 100 percent.

- <u>Top-Two Box Net</u>, 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.

The following symbols are shown in the report:

- Tables show an asterisk ("✻") to denote that less than 0.5 percent is presented for a response category.

- Tables show a dash ("-") to indicate that a particular response did not appear in the corresponding survey year or that the response option is not applicable to that particular survey category.

- A double asterisk ("✻✻") indicates that no data or response was submitted for the corresponding survey option.

How To Read This Report – continued

Survey results are presented in tables, charts and/or graphs. Table results must be read vertically because column percents are shown. Figures are based on the number of responses to a particular survey question. When reviewing tables throughout the report, percentages may not sum to the "total population" due to non-response by participants in a category and/or rounding.

No open-ended questions were asked this year. Appended to the report is a copy of the screener mini survey and the *2002 ICA Consumer Survey* from which results are presented (Appendix A and B respectively).

One way to review this report is to glance through the questionnaire in Appendix B to get an idea of the types of questions asked, then consult the table of contents for the appropriate pages. The results in the report do not necessarily appear in the same order as the questionnaire.

Word of Caution

Users of this report should consider the following issues when reviewing, discussing or making decisions based on the findings indicated in this document. Key issues include:

- The margin of error is only an approximation since participation was voluntary and hence not purely random.
- Smith, Bucklin & Associates, Inc. did not independently verify the data provided by each respondent, and does not express an opinion on the results in this report.

Key Findings

Demographic Characteristics

This section outlines key findings of the consumer survey. The following three charts show the relationship between gender, age, income, region, and wash type used most often.

- In 2002, more respondents were *female* than *male*. Stationary automatic and exterior customers were least likely to be *male* whereas full-service and self-service customers were more likely to be *male*.

	Wash Type Used Most Often					
Gender	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Male	40.5%	42.3	45.3	35.7	34.1	43.1
Female	59.5%	57.7	54.7	64.3	65.9	56.9

- Almost 30 percent of the self-service most-often customers are *under 40 years of age*, while 64.4 percent of full-service most often customers are *50 years and older*.

	Wash Type Used Most Often					
Head of Household Age	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Under 30 years	8.1%	7.9%	5.1%	5.6%	9.3%	12.3%
30 to 39 years	15.2%	15.6%	11.0%	17.5%	18.9%	16.2%
40 to 49 years	22.0%	22.5%	19.5%	19.5%	26.8%	23.3%
50 to 59 years	20.4%	20.9%	22.1%	16.2%	18.4%	21.0%
60 years or older	34.4%	33.0%	42.3%	41.1%	26.5%	27.2%

- Full-service most-often customers (40.1%) dominated the $*75,000 and over* income categories.

	Wash Type Used Most Often					
Total Annual Household Income	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Under $20,000	16.9%	16.6%	8.9%	13.2%	13.9%	26.4%
$20,000 to $39,999	25.8%	26.4%	20.8%	21.9%	26.9%	31.2%
$40,000 to $59,000	20.0%	20.2%	20.6%	21.9%	21.1%	18.6%
$60,000 to $74,999	9.0%	10.0%	9.6%	7.7%	12.7%	4.6%
$75,000 to $99,999	16.0%	15.8%	20.8%	21.6%	12.7%	12.4%
$100,000 to $149,999	9.3%	8.8%	13.8%	10.2%	9.6%	5.7%
$150,000 and Over	3.0%	2.5%	5.5%	3.5%	3.1	1.1%

Note: The “Overall” figures presented on this page include respondents who may not have selected a *most often used wash type*.

Key Findings

Demographic Characteristics

- The largest percentage of responding customers is the exterior conveyor most-often customers (24.1%) in the East North Central region followed by the stationary automatic customers (21.3%) in the West North Central region. In comparison, the smallest segment is the West South Central exterior conveyor customers.

		Wash Type Used Most Often				
Regions	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
New England	8.9%	9.8%	8.7%	16.2%	4.6%	4.8%
Middle Atlantic	12.1%	12.0%	14.6%	15.9%	6.2%	10.7%
East North Central	12.6%	9.8%	9.7%	24.1%	16.8%	12.7%
West North Central	10.4%	7.7%	5.7%	8.0%	21.3%	18.1%
South Atlantic	12.6%	15.5%	12.8%	7.5%	10.6%	10.3%
East South Central	9.8%	12.6%	5.7%	4.2%	10.8%	7.2%
West South Central	11.5%	10.3%	13.4%	4.0%	12.5%	17.2%
Mountain	10.2%	8.6%	11.6%	8.2%	12.2%	14.2%
Pacific	12.0%	13.9%	17.8%	11.9%	5.0%	4.8%

- Overall, more responding customers live in metropolitan statistical areas larger than 2 million than in areas less than 2 million. However, stationary automatic and self-service customers are most likely to live in non-metropolitan areas.

		Wash Type Used Most Often				
Population Density	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Non-MSA*	22.2%	21.4%	6.7%	14.2%	30.9%	40.6%
MSA (to ½ mil.)	18.1%	17.8%	14.8%	15.4%	22.5%	22.3%
MSA (½ mil. to 2 mil.)	27.5%	27.9%	34.1%	34.1%	23.5%	17.0%
MSA (over 2 mil.)	32.1%	33.0%	44.5%	36.3%	23.0%	20.1%

*MSA – Metropolitan Statistical Area

- The majority of home washers and car wash customers drive and wash a *car* most often. However, self-service customers are more likely to drive a truck and stationary automatic customers are more likely to drive a van than are the other car wash customers.

		Wash Type Used Most Often				
Primary Vehicle Driven and Washed Most Often	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Car	65.0%	62.4%	72.1%	69.1%	62.6%	60.2%
Van	12.0%	11.1%	10.3%	14.2%	16.5%	12.0%
Truck	11.7%	14.9%	6.5%	6.3%	8.3%	16.2%
SUV	11.4%	11.6%	11.5%	10.4%	12.6%	11.6%

Note: The "Overall" figures presented on this page include respondents who may not have selected a *most often used wash type*.

Demographic Characteristics - continued

♦ The majority of the respondents drive between *51 to 100 miles per week*.

	Wash Type Used Most Often					
Number of Miles Driven Per Week	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
50 miles or less	24.5%	25.9%	21.8%	24.5%	17.4%	24.2%
51 to 100 miles	33.1%	32.9%	31.4%	32.3%	31.4%	38.9%
101 to 200 miles	24.3%	24.6%	24.1%	25.3%	28.7%	20.1%
201 to 300 miles	11.8%	11.0%	15.8%	10.9%	12.6%	10.7%
301 to 500 miles	4.7%	4.1%	5.3%	6.3%	5.3%	5.0%
More than 500 miles	1.7%	1.5%	1.5%	0.8%	4.6%	1.1%

♦ More respondents live in *households of two*. Self-service customers are more likely to live in households of five or more and home washers are more likely to live in households of four. This in part, may be a based on the fact that the majority of the respondents are *50 years or older*.

	Wash Type Used Most Often					
Household Size	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
One	27.5%	23.1%	33.9%	29.1%	28.5%	27.9%
Two	40.2%	42.6%	39.6%	41.3%	37.9%	35.6%
Three	13.4%	13.9%	11.2%	13.7%	14.4%	15.3%
Four	11.9%	13.1%	9.9%	10.7%	11.0%	11.8%
Five or more	6.9%	7.4%	5.4%	5.2%	8.2%	9.4%

♦ Overall, more respondents (60.7%) are *married* than *widowed, divorced, separated* or *single*.

	Wash Type Used Most Often					
Marital Status	**Overall**	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Married	60.7%	65.7%	57.1%	61.4%	58.6%	55.5%
Widowed	9.8%	8.0%	13.7%	11.9%	8.1%	8.2%
Divorced	13.6%	12.6%	13.9%	11.4%	15.2%	15.9%
Separated	1.2%	0.9%	1.0%	0.5%	2.2%	2.0%
Never Married	14.6%	12.7%	14.2%	14.7%	15.9%	18.4%

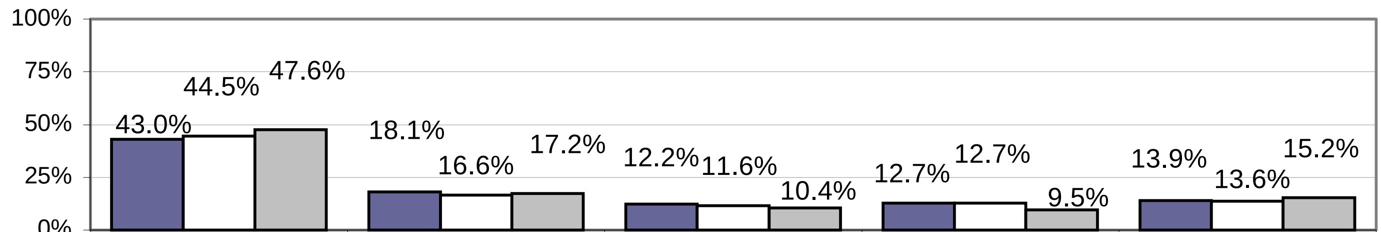
Note: The "Overall" figures presented on this page include respondents who may not have selected a *most often used wash type*.

Key Findings

Type of Washing

♦ The table below shows that home washing is down by 3.4 percent from 1999 and by 9.6 percent from 1996. Interestingly, self-service washing increased to 2.2 percent from 1999, but shows a decline when comparing washing habits in 1996 to 2002. In comparison, stationary automatic washing has remained the same from 1999 to 2002, but is up by 33.7 percent from 1996. Exterior car washing has increased by 11.5 percent from 1996 to 1999 and has increased 5.2 percent from 1999 to 2002. And, full-service washing has increased by 5.2 percent since 1996 and by 9.0 percent since 1999.

Type of Wash Used Most Often

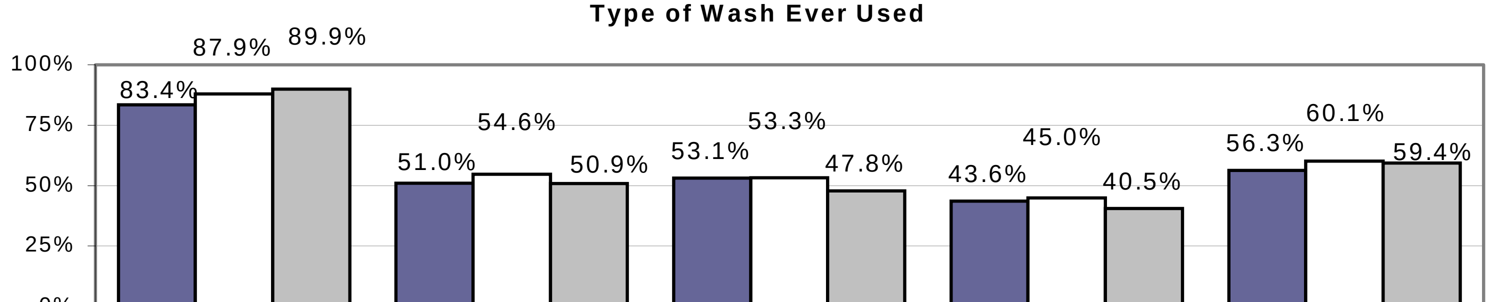


	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
2002	43.0%	18.1%	12.2%	12.7%	13.9%
1999	44.5%	16.6%	11.6%	12.7%	13.6%
1996	47.6%	17.2%	10.4%	9.5%	15.2%

Note: The formula for calculating the "percent change" is to divide the current year (noted) by the previous year (noted), then to multiply this figure by 100 and then to subtract the final figure by 100.

♦ When asked to indicate which specific types of washes they have *ever used*, respondents reported that home wash (83.4%) was the type of car wash most everyone has *ever used*. In 2002, self-service (56.3%), full-service (51.0%) and exterior (53.1%) were all used by more than half of the respondents. However, less than half of the respondents reported ever using a stationary automatic car wash (43.6%).

Type of Wash Ever Used



	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
2002	83%	51%	53%	44%	56%
1999	88%	55%	53%	45%	60%
1996	90%	51%	48%	41%	59%

Key Findings

Washing Attitudes

Respondents were asked how important several factors were in the selection of a car wash. These questions are based on a 5-point scale where “5” equals “Very Important” and “1” equals “Not very/Not at all Important.” The respondents were asked to rate the delivery of each of these factors when it came to the car wash types they have *ever used*. The responses for this question are based on a 5-point scale where 5 equals “Excellent” and 1 equals “Poor.”

Stationary automatic customers rated the importance of the quality of the wash higher than their satisfaction with it. Exterior wash customers rated their satisfaction with less work higher than the importance of it, while self-service customers rated the satisfaction of less work lower than the importance of it. For self-service customers, there was very little difference between what the self-service customer defines as important and what the self-service customer receives in regards to the overall process of cleaning their vehicles. Full-service customers are less concerned about the cost associated with cleaning their vehicle than any other type of customer. However, the difference between the importance of and their satisfaction with cost-related issues is the largest for full-service customers. For exterior customers, the value of their car wash is very important (88.2%). However, they were the least satisfied customers (65.7%) in regards to the money they spent when getting their vehicle cleaned.

Importance & Satisfaction (with End-Product) Ratings Mean (Top-two box net percent)	**Type of Car Wash Ever Used**				
	Home wash	**Full-service wash**	**Exterior wash**	**Stationary automatic wash**	**Self-service wash**
Importance of quality of the wash	4.52 (87.3%)	4.74 (95.6%)	4.56 (90.8%)	4.56 (91.1%)	4.48 (88.1%)
Satisfaction with quality of the wash	4.61 (91.4%)	4.39 (89.9%)	4.00 (76.4%)	3.88 (68.0%)	4.11 (78.7%)
Importance of less work	3.12 (39.0%)	3.80 (62.8%)	3.74 (60.5%)	3.87 (65.5%)	3.37 (48.9%)
Satisfaction with less work	2.77 (27.5%)	4.52 (89.4%)	4.39 (87.8%)	4.41 (89.4%)	3.25 (42.8%)
Importance of faster overall	3.18 (41.7%)	3.73 (59.5%)	3.58 (54.9%)	3.68 (58.5%)	3.42 (50.9%)
Satisfaction with faster overall	3.18 (37.3%)	4.30 (82.3%)	4.32 (84.9%)	4.40 (88.4%)	3.59 (55.2%)
Importance of conveniently located	3.82 (66.6%)	4.12 (76.5%)	4.09 (75.2%)	4.13 (79.4%)	4.11 (79.3%)
Satisfaction with conveniently located	4.71 (93.1%)	4.10 (75.4%)	4.12 (78.4%)	4.25 (82.7%)	4.16 (80.4%)
Importance of ease of use	3.87 (68.4%)	4.17 (80.0%)	4.16 (79.6%)	4.26 (86.3%)	4.15 (80.1%)
Satisfaction with ease of use	4.20 (76.8%)	4.44 (89.3%)	4.41 (89.8%)	4.48 (92.2%)	4.05 (76.0%)
Importance of cost	4.23 (80.1%)	4.08 (74.8%)	4.17 (78.2%)	4.22 (81.8%)	4.25 (80.2%)
Satisfaction with cost	4.70 (92.5%)	3.56 (55.6%)	3.80 (64.4%)	3.89 (69.4%)	3.86 (68.2%)
Importance of safety of car’s exterior	4.40 (84.9%)	4.49 (88.5%)	4.47 (89.2%)	4.48 (88.7%)	4.37 (84.4%)
Satisfaction with safety of car’s exterior	4.70 (93.7%)	4.09 (75.8%)	3.84 (67.9%)	3.93 (69.7%)	4.09 (75.9%)
*Importance of customer service	3.58 (55.7%)	4.17 (76.9%)	3.86 (65.7%)	3.53 (51.2%)	3.34 (46.9%)
Importance of value (quality of wash for money spent)	4.27 (81.9%)	4.41 (88.5%)	4.38 (88.2%)	4.41 (87.8%)	4.37 (86.3%)
Satisfaction with of value (quality of wash for money spent)	4.71 (93.6%)	3.92 (70.0%)	3.81 (65.7%)	3.88 (67.0%)	3.90 (68.6%)

*Respondents were not asked to rate the delivery of customer service. “Top-two box net” is the percentage who rated the factors a “4” or “5.”

Washing attitudes – continued

♦ Respondents were asked to rank a list of 12 additional services, that could be offered at the same location as a car wash, in order of importance. Overall, the number one additional service that can be offered at a car wash is a gas station (53.4%) followed by an ATM machine (45.0%), and express detailing (40.0%). The table below also shows the percentage of respondents rating each additional service as their number one choice to be offered at the same locations as a car wash.

Additional Services (In Rated #1 Service, Percent Rank Order Based on Overall)	**Type of Car Wash Used Most Often - 2002**					
	Overall	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Gas station	53.4%	53.0%	47.8%	59.2%	60.4%	50.0%
ATM	45.0%	46.7%	50.7%	35.4%	37.6%	45.2%
Express detailing	40.0%	40.4%	38.5%	41.6%	41.7%	34.1%
Oil change/quick lube	34.1%	34.1%	40.5%	29.9%	31.6%	35.2%
Other	31.7%	38.5%	9.1%	25.0%	18.2%	43.8%
Brakes	26.2%	20.5%	16.0%	31.3%	29.4%	26.3%
Dry cleaner	26.0%	34.4%	26.1%	25.0%	15.0%	25.0%
Convenience store	25.9%	27.5%	28.4%	23.5%	19.0%	24.7%
Paintless Dent-Repair	23.2%	24.5%	25.7%	25.6%	11.5%	23.8%
Water Dispenser	20.9%	22.2%	19.1%	20.0%	13.0%	27.6%
Truck rental	18.8%	**	33.3%	**	**	33.3%
Gift Shop	18.5%	15.7%	23.2%	18.8%	11.8%	19.4%
Windshield repair	17.3%	13.2%	20.0%	17.2%	35.3%	7.7%
Quick-service restaurant	15.0%	14.1%	17.3%	17.6%	18.0%	14.7%
Propane gas	13.6%	10.3%	25.0%	7.1%	10.0%	28.6%
Tune up	13.1%	10.6%	22.0%	7.7%	2.9%	18.2%

** = No data was submitted.

♦ As seen in the Demographic Characteristics section of this report, when respondents were asked what services are important factors in their selection of the car wash they use, overall, the top-two choices for were *spot-free rinse* and *wheel/hubcap cleaning*. Not surprising, full-service customers ranked *interior vacuuming* the highest (80.9%) followed by *hand towel drying* (74.2%).

Important Factors in Car Wash Selection (In Percent Rank Order Based on Overall)	**Type of Car Wash Used Most Often**					
	Overall	**Home washers**	**Full-service customers**	**Exterior customers**	**Stationary automatic customers**	**Self-service customers**
Spot-free rinse	56.8%	49.3%	61.4%	53.5%	68.1%	60.0%
Wheel/hubcap cleaning	53.4%	53.0%	70.5%	52.1%	41.5%	43.0%
Interior vacuuming	51.0%	51.4%	80.9%	30.3%	26.9%	46.6%
Under body wash	43.5%	38.2%	42.0%	49.0%	60.6%	31.8%
Hand towel drying	39.7%	37.8%	74.2%	38.0%	13.0%	23.2%
Wax/paint protectant coating	38.6%	34.2%	43.4%	38.2%	46.5%	32.3%
Hand wax/protectant application	13.8%	15.4%	19.1%	11.3%	8.5%	8.9%
Triple color protectant (foam) conditioner	9.9%	6.3%	13.4%	13.0%	12.8%	5.3%
None of these are important	8.6%	8.7%	3.0%	12.5%	11.7%	13.0%
Carpet shampooing	6.9%	6.5%	11.4%	5.4%	5.0%	3.6%

** = No data was submitted.

Washing attitudes – continued

Respondents were asked to rate the importance of services in judging the quality of a car wash. They were then asked to rate the delivery of these same services. The following six (6) charts outline the responses of importance as compared to delivery of each service for each car wash type, i.e., home wash, full-service wash, exterior wash, stationary automatic wash and self-service wash. These responses are based on a 5-point scale where 5 = "Very Important" and 1 = "Not very/Not at all Important" for Importance and where 5 = "Excellent" and 1 = "Poor" for Delivery.

- Thoroughly cleaned *wheels* were most important to full-service customers, but least important to self-service customers.

Importance of **thoroughly cleaned wheels** compared to the delivery of it…	**Home washers**	**Full-service wash**	**Exterior wash**	**Stationary automatic wash**	**Self-service wash**
Importance – Mean (Top-two box net)	4.13 (73.5%)	4.29 (79.3%)	3.98 (69.9%)	3.89 (67.1%)	3.97 (66.8%)
Delivery – Mean (Top-two box net)	4.24 (75.8%)	4.17 (78.7%)	3.65 (56.3%)	3.45 (51.2%)	3.86 (67.7%)

- Thoroughly cleaned *windows* were rated most important to full-service customers. However, when comparing mean ratings delivery of thoroughly cleaned windows was rated highest by home washers.

Importance of **thoroughly cleaned windows** compared to the delivery of it…	**Home wash**	**Full-service wash**	**Exterior wash**	**Stationary automatic wash**	**Self-service wash**
Importance – Mean (Top-two box net)	4.71 (91.5%)	4.81 (94.6%)	4.74 (93.4%)	4.68 (92.4%)	4.63 (90.8%)
Delivery – Mean (Top-two box net)	4.52 (83.8%)	4.42 (86.5%)	4.18 (77.7%)	4.15 (78.9%)	4.24 (80.8%)

- The largest gap between how important a thoroughly cleaned *car body* is compared to the delivery of it is with stationary automatic washes.

Importance of **thoroughly cleaned car body** compared to the delivery of it…	**Home wash**	**Full-service wash**	**Exterior wash**	**Stationary automatic wash**	**Self-service wash**
Importance – Mean (Top-two box net)	4.75 (93.0%)	4.81 (95.5%)	4.81 (93.8%)	4.79 (95.0%)	4.74 (94.4%)
Delivery – Mean (Top-two box net)	4.53 (82.9%)	4.43 (86.9%)	4.18 (79.4%)	4.07 (76.2)	4.24 (84.1%)

Note: Presented in the table above the "Top-Two Box Net" is the percentage of respondents who rated the service a "4" or "5".

Washing attitudes – continued

- A thoroughly cleaned windshield is least important to self-service customers but stationary automatic customers rated the delivery of service the lowest.

Importance of **thoroughly cleaned windshield** compared to the delivery of it…	Home Wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Importance – Mean (Top-two box net)	4.76 (92.1%)	4.84 (95.2%)	4.81 (93.9%)	4.74 (94.0%)	4.67 (92.1%)
Delivery – Mean (Top-two box net)	4.57 (85.0%)	4.44 (86.6%)	4.28 (81.3%)	4.18 (79.9%)	4.29 (84.1%)

- The lowest rating for importance AND delivery of thoroughly cleaned mats/carpets went to stationary automatic washes.

Importance of **thoroughly cleaned mats/carpets** compared to the delivery of it…	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Importance – Mean (Top-two box net)	3.72 (58.4%)	4.09 (73.4%)	3.24 (41.3%)	3.12 (36.3%)	3.45 (47.1%)
Delivery – Mean (Top-two box net)	3.89 (60.4%)	3.83 (65.0%)	2.31 (15.5%)	1.98 (14.4%)	3.02 (36.6%)

- Having a thoroughly cleaned front dash/console is least important to stationary automatic customers and the quality of the delivery was rated the lowest.

Importance of **thoroughly cleaned front dash/console** compared to the delivery of it…	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Importance – Mean (Top-two box net)	3.72 (58.4%)	4.18 (75.4%)	3.25 (42.9%)	3.13 (38.3%)	3.43 (45.9%)
Delivery – Mean (Top-two box net)	3.92 (62.6%)	3.89 (64.9%)	2.34 (17.0%)	1.91 (12.4%)	2.86 (32.0%)

- The importance AND delivery of a thoroughly dried car after wash was rated highest for full-service washes. In comparison, self-service washes received the lowest importance and delivery ratings for this service.

Importance of **thoroughly dried car after wash** compared to the delivery of it…	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Importance – Mean (Top-two box net)	3.82 (61.8%)	4.32 (80.9%)	3.80 (62.3%)	3.53 (53.3%)	3.34 (47.8%)
Delivery – Mean (Top-two box net)	3.95 (61.2%)	4.04 (72.8%)	3.20 (40.3%)	2.86 (32.6%)	2.77 (31.8%)

Note: Presented in the table above the "Top-Two Box Net" is the percentage of respondents who rated the service a "4" or "5".

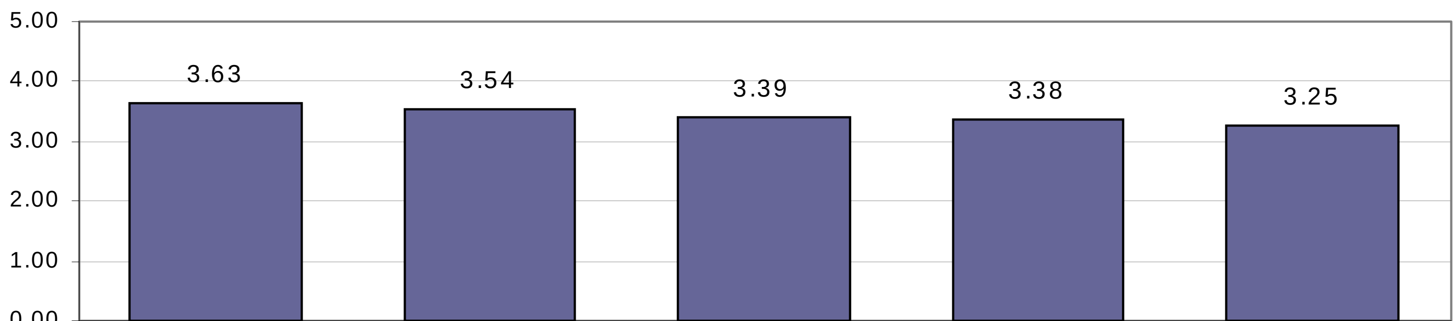
Washing attitudes – continued

♦ The greatest influence over whether most customers might go to a professional car wash was if *special prices/discount coupons* were offered. For stationary automatic customers, however, professional washes that offer discounted or free wash with a gas purchase is the greatest influence. According to self-service customers, the greatest influence over whether they might go to a professional car wash is if they have a special occasion to go to and want their vehicle to be cleaned for the event. This question was based on a rating scale of 1 to 5 where 5 = "A great deal of influence" and a 1 = "Little or no influence."

	Wash Type Used Most Often - 2002					
Factors Influencing Use of Car Wash (In Mean Rank Order Based on Overall)	**Overall**	**Home wash**	**Full-service wash**	**Exterior wash**	**Stationary automatic wash**	**Self-service wash**
Special prices/discount coupons	3.63	3.25	3.82	3.90	3.63	3.09
For special occasions	3.54	3.13	3.44	3.56	3.51	3.55
Discounted or free wash with gas purchase	3.39	3.18	2.83	3.45	3.73	3.11
Appearance of car wash	3.38	2.89	3.47	3.54	3.35	3.27
Car wash offers extra services	3.25	2.67	3.72	3.15	3.04	2.74
Discounted gas with car wash purchase	3.17	2.78	2.55	3.00	3.11	2.76
On impulse	3.07	2.49	2.79	2.97	3.11	3.12
Environmentally safe to wash car	2.92	2.43	2.86	2.91	2.69	2.69
Frequent washer discount	2.87	2.24	3.09	2.91	2.73	2.42
Recognized carwash name/use of brand name products	2.58	2.15	2.59	2.51	2.34	2.13
Recommendation of a friend	2.71	2.42	2.63	2.50	2.47	2.21
Prepaid for multiple car washes at discounted price	2.63	2.13	2.49	2.77	2.40	2.17
Free/discounted oil change	2.60	2.23	2.16	2.28	2.36	2.21
Advertisements	2.54	2.13	2.53	2.41	2.28	1.98
Pay with credit/debit card	2.54	2.07	2.66	2.43	2.47	1.89

- = Not Applicable.

Overall Top Five Factors Influencing Use of a Car Wash



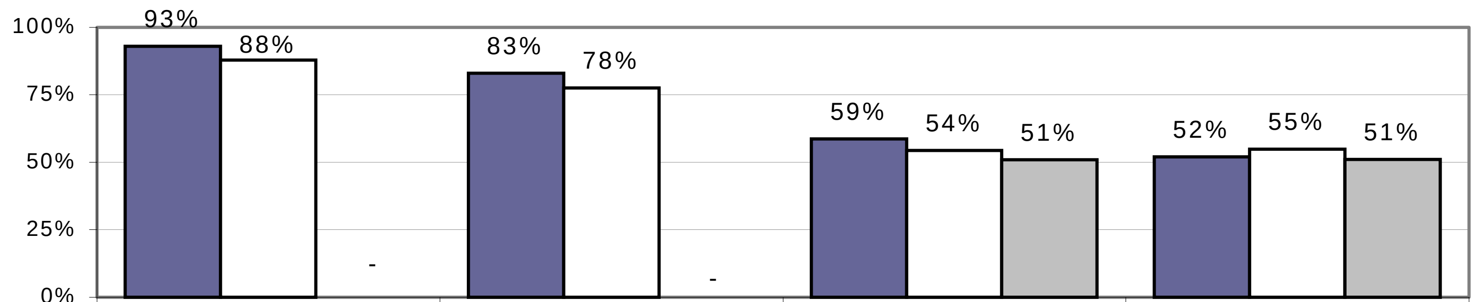
	Special prices/discount	For special occasions	Discounted or free wash with gas	Appearance of car wash	Car wash offers extra services
2002	3.63	3.54	3.39	3.38	3.25

Key Findings

Washing attitudes – continued

- Respondents were asked to choose which type of washing is better in a number of areas. The graph below shows the reasons why respondents believe professional car washing is better than home washing. The results are benchmarked across study years. As in 1996 and 1999, the majority of respondents felt that car washing was better than home washing because it require *less work*, it's *faster overall*, *more enjoyable* and *more convenient.*

Car Washing is Better in the Following Areas



	Less work	Faster overall	More enjoyable	More convenient
2002	93%	83%	59%	52%
1999	88%	78%	54%	55%
1996	-	-	51%	51%

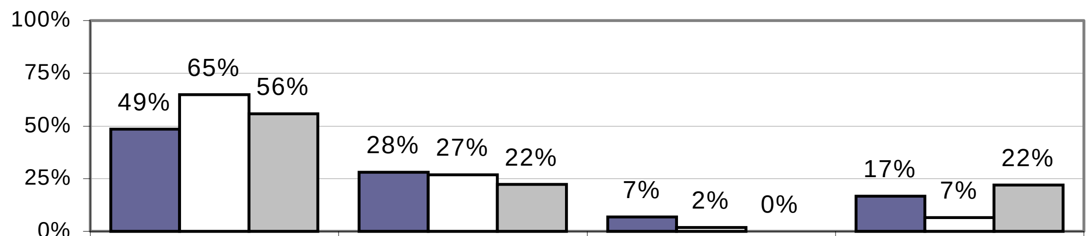
- The table below shows what type of car wash a respondent, who stated that the listed features would get them to use a professional car wash more often, has used in the past **four weeks**. The results show that customers are mostly influenced by *lower cost*.

Features by car wash type…	Overall	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Lower cost	71.9%	65.7%	78.8%	80.2%	80.6%	78.9%
Coupons	63.3%	55.0%	76.0%	79.7%	72.1%	58.1%
Frequent washer club	35.4%	22.3%	49.8%	49.9%	47.3%	32.3%
VIP treatment	17.5%	14.3%	27.9%	19.8%	20.5%	14.7%
If I had more time	17.0%	15.6%	15.7%	17.3%	17.8%	23.0%
If it took less time	15.9%	14.1%	18.3%	14.6%	17.6%	20.5%
Portering option	13.1%	11.4%	16.5%	13.0%	15.6%	12.8%
Not specified	11.3%	18.8%	2.3%	3.6%	2.5%	5.3%

Washing Habits

- Responding full-service, exterior and stationary automatic customers were also asked what type of wash they use: spray, cloth or hand. The majority of all wash type customers (i.e., full-service, exterior and stationary automatic) indicated they use *high-pressure spray wash.*

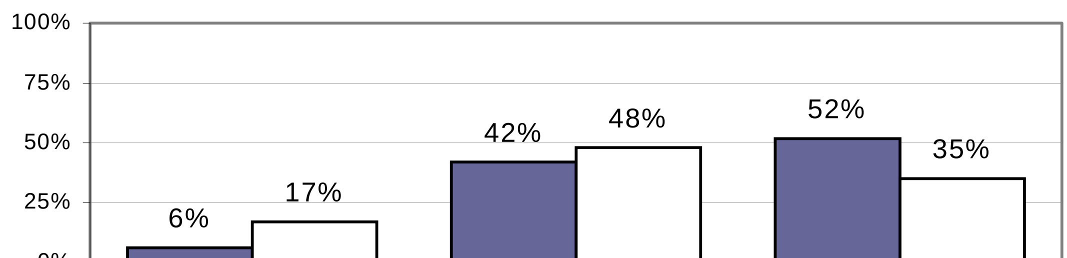
Preferred Type of Wash



	Spray wash	Cloth wash	Hand wash	No response
Full-service	49%	28%	7%	17%
Exterior wash	65%	27%	2%	7%
Stationary automatic wash	56%	22%	0%	22%

- When washing the exterior of their vehicle, about half of home washers (51.8%) usually clean the interior while less than half (41.9%) sometimes clean the interior. Interestingly, less than half of all professional wash types usually (35.1%) or sometimes (47.9%) have the interior of their vehicle cleaned when they have the exterior washed.

Cleaning the Vehicle's Interior



	Don't usually clean	Sometimes clean	Usually clean interior
Home Washer	6.2%	41.9%	51.8%
All Professional Customers	17.0%	47.9%	35.1%

Washing Habits – continued

The table below outlines how many times a respondent, who stated that the listed features would get them to use a professional car wash more often, has taken their car to a professional car wash, washed their car at home and had their car detailed in the past year.

	Incentive Features						
Behavior Pattern	**Coupons**	**Frequent Washer Club**	**VIP Treatment**	**Lower Cost**	**Portering Option**	**If I had More Time**	**If it Took Less Time**
Taken vehicle to a professional wash							
0 times/Have not done	54.2%	26.7%	11.6%	67.6%	10.6%	18.3%	15.6%
1-3 times	71.4%	35.8%	21.9%	79.6%	14.9%	18.4%	16.8%
4-6 times	79.2%	45.9%	22.3%	81.5%	14.0%	16.5%	14.5%
7-9 times	79.0%	52.3%	21.0%	81.5%	15.6%	15.2%	15.2%
10-12 times	73.1%	53.8%	25.4%	76.6%	23.9%	14.2%	23.4%
More than 12 times	69.4%	65.3%	35.1%	73.4%	14.0%	11.7%	15.8%
Washed car at home							
0 times/ Have not done	70.0%	45.2%	19.4%	76.6%	15.0%	18.1%	16.8%
1-3 times	69.8%	41.5%	19.2%	77.0%	14.0%	19.1%	16.7%
4-6 times	61.3%	30.8%	17.0%	72.9%	12.6%	20.4%	16.7%
7-9 times	58.8%	27.7%	11.9%	74.0%	12.5%	19.3%	16.1%
10-12 times	58.3%	26.8%	16.6%	66.9%	9.9%	13.9%	12.6%
More than 12 times	52.8%	27.6%	17.4%	63.8%	11.4%	11.4%	14.1%
Had car detailed							
0 times/Have not done	63.7%	34.3%	14.6%	73.7%	11.6%	17.7%	15.2%
1-3 times	68.5%	49.1%	32.7%	76.4%	22.2%	18.8%	20.8%
4-6 times	75.9%	50.0%	44.4%	74.1%	22.2%	13.0%	24.1%
7-9 times	75.0%	33.3%	16.7%	66.7%	25.0%	16.7%	25.0%
10-12 times	40.0%	40.0%	40.0%	70.0%	10.0%	30.0%	20.0%
More than 12 times	47.1%	23.5%	23.5%	64.7%	11.8%	5.9%	11.8%

Demographic Characteristics

Overview

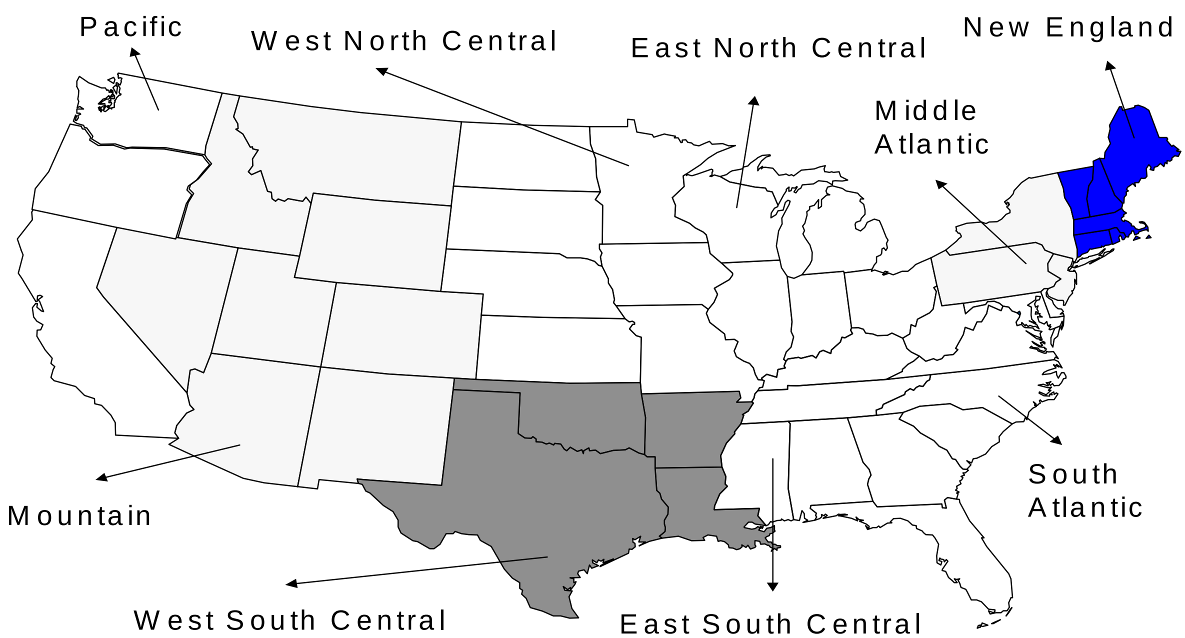
For each customer section of this report, the following demographic characteristics are listed:

- Gender
- Head of Household Age
- Total Annual Household Income
- Population Density
- Primary Vehicle Driven and Washed Most Often
- Number of Miles Driven Per Week
- Household Size
- Marital Status

The demographic characteristics are shown overall for the consumer survey sample in this section of the report. When reviewing the five washer sections of this report, i.e., *Home Washer, Full-service Customers, Exterior Customers, Stationary Automatic Customers*, and *Self-service Customers*, it will be useful to compare the demographic characteristics of those respondents to the overall demographic characteristics shown here.

Regional Findings

- The regional response was very similar to the regional population of the United States. The map below illustrates the nine regions of the U.S., as defined by the U.S. Census Bureau that are used in this report.



- In order to understand the relationship between demographics and the car wash selections, it was extremely important that our sample represent these demographic differences in population. Below and on the following pages we show the demographic characteristics nationally and by region of those households that own or lease a car.

	Regions – 2002								
Percent	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Respondents in each region	8.9%	12.1%	12.6%	10.4%	12.6%	9.8%	11.5%	10.2%	12.0%

Regional Findings – continued

- The following table shows the *gender* for all respondents by *region.* Across regions, the majority of the respondents were *female*.

	Regions – 2002									
Gender	Overall	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Male	40.5%	38.1%	40.2%	43.2%	39.1%	41.2%	35.8%	38.3%	38.5%	47.5%
Female	59.5%	61.9%	59.8%	56.8%	60.9%	58.8%	64.2%	61.7%	61.5%	52.5%

- The following table shows the *head of household age* of all respondents by *region*. Based on the age categories listed below, more respondents reported that they are either *60 years of age or older*.

	Regions – 2002									
Head of Household Age	Overall	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Under 30 years	8.1%	9.6%	5.4%	7.4%	9.3%	5.1%	7.7%	7.5%	12.2%	9.7%
30 to 39 years	15.2%	19.2%	15.5%	16.1%	17.8%	14.1%	17.5%	13.5%	14.6%	10.2%
40 to 49 years	22.0%	21.1%	25.3%	26.1%	22.5%	21.9%	21.4%	22.3%	16.3%	20.1%
50 to 59 years	20.4%	20.1%	20.4%	18.3%	20.3%	21.4%	23.1%	20.3%	18.2%	21.3%
60 years or older	34.4%	30.0%	33.5%	32.1%	30.1%	37.6%	30.3%	36.3%	38.7%	38.8%

- The following table shows *total annual household income* for all respondents by *region*. Overall, almost half of the respondent's total annual household income ranges from *$20,000 to almost $59,999*.

	Regions – 2002									
Total Annual Household Income	Overall	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Under $20,000	16.9%	16.3%	15.5%	15.9%	16.8%	14.0%	23.0%	18.1%	19.4%	14.6%
$20K to $39,999	25.8%	20.6%	22.7%	24.8%	31.5%	22.9%	31.1%	27.0%	28.8%	23.6%
$40K to $59,999	20.0%	23.9%	16.8%	19.8%	22.0%	19.0%	18.5%	18.4%	22.9%	20.4%
$60K to $74,999	9.0%	8.3%	10.0%	8.3%	10.5%	10.3%	7.0%	10.7%	5.9%	9.4%
$75K to $99,999	16.0%	18.4%	21.1%	18.7%	10.5%	19.2%	12.3%	12.4%	12.4%	16.9%
$100K to $149,999	9.3%	8.0%	11.8%	10.4%	5.8%	12.9%	6.2%	9.5%	8.1%	9.2%
$150K and over	3.0%	4.6%	2.0%	2.2%	2.9%	1.7%	2.0%	3.8%	2.4%	5.9%

Regional Findings – continued

- The following table shows the *population density* for all respondents by *region*.

Population Density	Regions – 2002									
	Overall	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Non-MSA*	22.2%	16.9%	9.5%	21.7%	40.4%	17.7%	42.0%	26.0%	23.7%	7.3%
MSA (to ½ mil.)	18.1%	17.8%	12.3%	21.1%	20.5%	19.2%	21.3%	20.0%	16.7%	14.9%
MSA (½ mil. to 2 mil.)	27.5%	37.7%	29.5%	26.3%	11.3%	27.7%	36.7%	31.7%	22.9%	25.4%
MSA (over 2 mil.)	32.1%	27.6%	48.6%	30.9%	27.8%	35.4%	✻✻	22.2%	36.7%	52.4%

*MSA – Metropolitan Statistical Area
✻✻ = No data was submitted.

- The following table shows the *primary vehicle driven and washed most often* for all respondents by *region*. Across regions, most respondents drive and wash a *car* most often versus a van, truck or SUV.

Primary Vehicle Driven & Washed Most Often	Regions – 2002									
	Overall	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Car	65.0%	67.8%	68.8%	64.2%	60.9%	67.6%	66.5%	60.1%	61.2%	67.7%
Van	12.0%	12.2%	12.8%	16.1%	14.6%	11.0%	9.0%	10.7%	12.1%	9.0%
Truck	11.7%	8.4%	7.1%	9.8%	12.1%	10.4%	14.5%	16.8%	14.6%	11.8%
SUV	11.4%	11.6%	11.3%	9.8%	12.4%	11.0%	10.1%	12.4%	12.1%	11.6%

- The following table shows the *number of miles driven per week* for all respondents by *region*. More respondents drive between *51 to 100 miles per week* than any other mileage category.

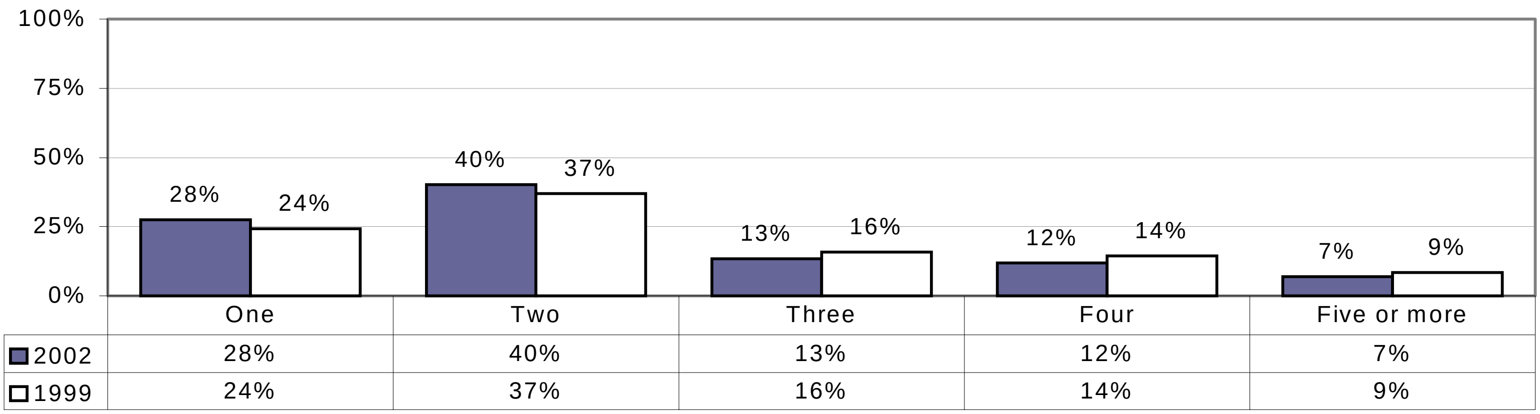
Number of Miles Driven Per Week	Regions – 2002									
	Overall	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
50 miles or less	24.5%	18.5%	28.3%	21.9%	26.3%	23.5%	23.4%	23.2%	28.7%	25.8%
51 to 100 miles	33.1%	33.9%	34.8%	31.2%	35.8%	32.8%	32.2%	32.4%	31.4%	33.5%
101 to 200 miles	24.3%	25.1%	20.0%	27.4%	20.4%	25.7%	27.9%	26.9%	26.5%	19.1%
201 to 300 miles	11.8%	13.8%	10.4%	13.7%	10.1%	11.8%	12.0%	10.7%	9.3%	14.2%
301 to 500 miles	4.7%	6.9%	3.7%	5.3%	4.5%	5.1%	3.1%	5.3%	3.6%	4.9%
More than 500 miles	1.7%	1.9%	2.8%	✻	2.9%	1.1%	1.4%	1.5%	0.5%	2.6%

✻ = Less than 0.5 percent.

Regional Findings – continued

- The following table shows the *household size* for all respondents by *region*. For respondents, the average household size is *two* across regions. The graph below shows a comparison between the average household size of customers in 2002 versus 1999.

		Regions – 2002								
Household Size	**Overall**	**New England**	**Middle Atlantic**	**East North Central**	**West North Central**	**South Atlantic**	**East South Central**	**West South Central**	**Mountain**	**Pacific**
One	27.5%	29.8%	22.3%	25.4%	25.7%	27.9%	28.9%	27.7%	27.0%	33.9%
Two	40.2%	37.1%	37.7%	39.8%	39.1%	43.9%	40.3%	42.5%	41.8%	39.1%
Three	13.4%	12.6%	17.0%	14.6%	13.4%	13.1%	14.8%	12.4%	12.1%	10.5%
Four	11.9%	13.2%	13.9%	13.5%	12.6%	10.0%	9.8%	12.6%	11.1%	10.5%
Five or more	6.9%	7.4%	9.1%	6.7%	9.2%	5.0%	6.2%	4.8%	8.1%	5.9%



- The following table shows the *marital status* for all respondents by *region*. Nationally, more respondents are *married* than widowed, divorced, separated or single.

		Regions – 2002								
Marital Status	**Overall**	**New England**	**Middle Atlantic**	**East North Central**	**West North Central**	**South Atlantic**	**East South Central**	**West South Central**	**Mountain**	**Pacific**
Married	60.7%	56.5%	66.0%	60.5%	65.2%	60.7%	61.6%	60.5%	59.0%	55.9%
Widowed	9.8%	9.6%	10.5%	7.5%	8.5%	11.8%	10.2%	9.9%	10.9%	9.6%
Divorced	13.6%	13.7%	11.4%	15.1%	10.9%	11.8%	15.6%	15.5%	13.1%	15.3%
Separated	1.2%	0.9%	1.6%	0.9%	0.5%	1.3%	1.1%	1.5%	1.4%	1.4%
Never Married	14.6%	19.3%	10.5%	16.0%	14.9%	14.4%	11.4%	12.6%	15.6%	17.8%

Demographic Characteristics

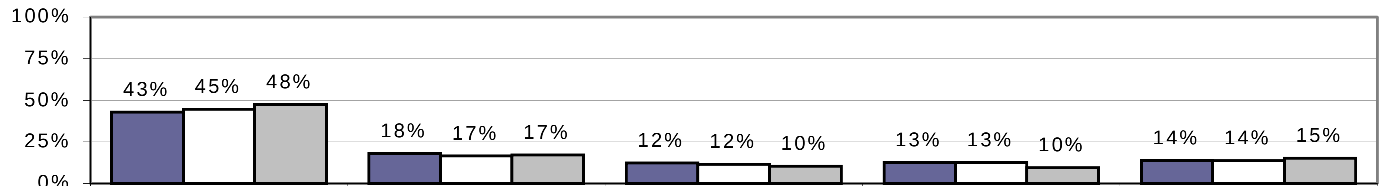
Type of Washing

Respondents were asked to indicate which specific type of car washes they *use most often*, *use most recently* and have *ever used*. The wash categories and their definitions shown in this report are:

- **Home wash:** washing your car at home
- **Full-service conveyor car wash:** car is pulled through the wash by a conveyor and extra services such as interior cleaning and waxing are offered
- **Exterior conveyor car wash:** car is pulled through the wash by a conveyor and the outside of the car is washed
- **Stationary automatic car wash:** car is washed automatically but car does not move
- **Self-service coin-operated car wash:** car wash facility where you wash your car yourself using coin-operated washing equipment
- **Charity (car) wash:** car wash offered by a school, church or other community organization or group to raise money for a charity or event

Survey results in this report are most often cross-tabulated by *home washers, full-service customers, exterior customers, stationary automatic customers*, and *self-service customers* (refer to their washing usage in the graph below). *Charity customers* were not included in the analysis because of their small respondent base. Only 1.0 percent of the respondents reported that they most often use charity washes.

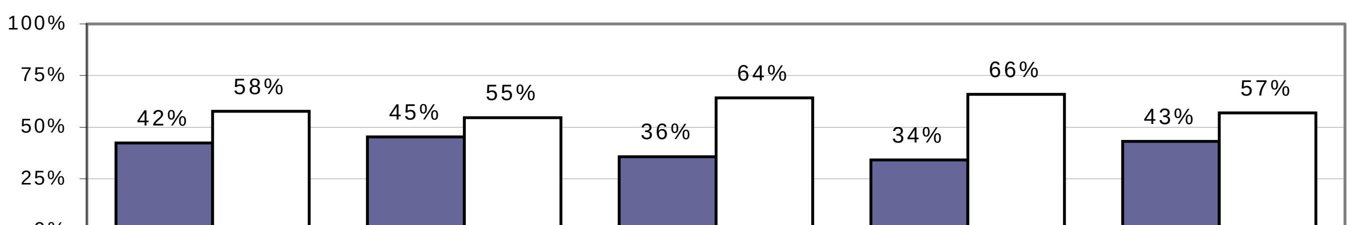
Type of Wash Used Most Often



	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
2002	43%	18%	12%	13%	14%
1999	45%	17%	12%	13%	14%
1996	48%	17%	10%	10%	15%

- For accuracy, the person who *most often washes* the car(s) in the household was asked to complete the consumer survey. The first question of the survey asked this individual to indicate their position in the household. The majority of the respondents who completed the survey were either the male or female head of household. The other categories included male or female child(ren) or dependent(s), and other male or other female.

Type of Car Wash Used Most Often - Male versus Female, 2002



	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Male	42%	45%	36%	34%	43%
Female	58%	55%	64%	66%	57%

Demographic Characteristics

Type of Washing – continued

- The table below shows the *car wash used most often* by *region*. The largest percentage of responding customers were the home washers (58.0%) in the East South Central region followed by the home washers (52.6%) in the South Atlantic region. In comparison, the smallest segment is the West South Central exterior customers (4.3%).

Car Wash Used Most Often	Regions – 2002								
	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Home wash	46.6%	42.8%	32.8%	31.4%	52.6%	58.0%	39.0%	35.9%	49.9%
Full-service wash	17.6%	22.0%	13.8%	9.8%	18.3%	11.1%	21.5%	20.3%	27.0%
Exterior wash	22.0%	16.2%	23.0%	9.2%	7.2%	5.5%	4.3%	9.7%	12.2%
Stationary automatic wash	6.4%	6.6%	16.6%	25.6%	10.6%	14.7%	14.0%	15.0%	5.3%
Self-service wash	7.4%	12.4%	13.8%	23.9%	11.3%	10.7%	21.2%	19.1%	5.6%

- The table below shows the *car wash used most often* by *head of household age*. Individuals under the age of 30 tend to wash their cars at self-service washes (21.5%) or stationary automatic washes (15.1%) when they do not wash their vehicles at home. Individuals that are 50 years or older (43.2%) tend to wash their vehicles at full-service washes when they choose not to wash at home.

Car Wash Used Most Often	Regions – 2002				
	Under 30 years	30 to 39 years	40 to 49 years	50 to 59 years	60 or older
Home wash	42.6%	42.7%	42.9%	43.9%	41.1%
Full-service wash	12.0%	13.2%	16.3%	20.2%	23.0%
Exterior wash	8.8%	14.0%	10.9%	10.0%	15.0%
Stationary automatic wash	15.1%	15.7%	15.4%	11.7%	10.0%
Self-service wash	21.5%	14.4%	14.4%	14.3%	11.0%

- The following table shows *car wash used most often* for all respondents by *total annual household income*. The majority of full-service customers' (82.0%) and exterior customers' (43.1%) total annual household income is $75,000 and above. In comparison, for most self-service customers the total annual household income ranges from under $20,000 to almost $60,000. Stationary automatic customers' (43.9) average between $20,000 to almost $75,000.

Car Wash Used Most Often	Household Income Categories – 2002						
	Under $20,000	$20,000 to $39,999	$40,000 to $59,999	$60,000 to $74,999	$75,000 to $99,999	$100,000 to $149,999	$150,000 and Over
Home wash	44.9%	44.4%	42.6%	46.7%	41.0%	39.6%	35.0%
Full-service wash	10.3%	14.8%	18.4%	18.8%	22.8%	26.2%	33.0%
Exterior wash	10.3%	10.5%	13.2%	10.2%	16.0%	13.1%	14.0%
Stationary automatic wash	11.2%	13.3%	13.2%	17.4%	9.7%	12.8%	13.0%
Self-service wash	23.4%	17.0%	12.7%	6.9%	10.5%	8.3%	5.0%

Demographic Characteristics

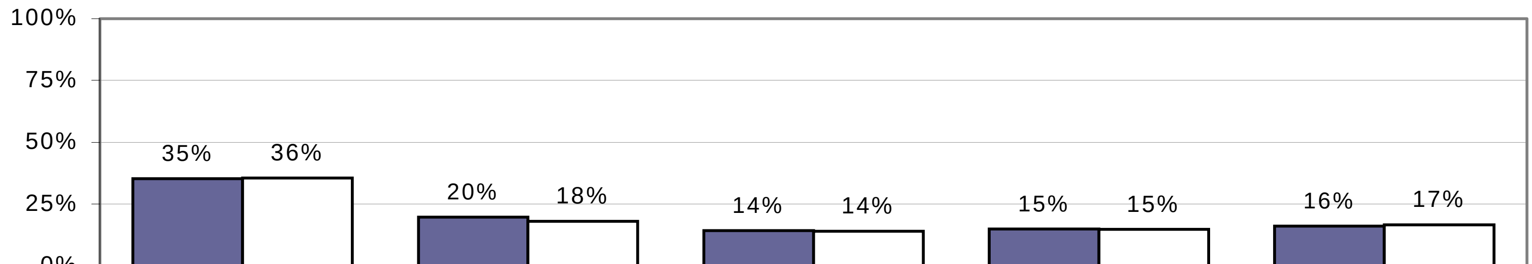
Type of Washing – continued

- The table below shows *car wash used most often* for all respondents by *primary vehicle driven and washed most often*. More customers tend to wash their *vans* at stationary-automatic washes rather than at any other type of professional wash while customers tend to wash their t*ruck*s more frequently at self-service washes. More customers prefer to wash their *car* and *SUV* at full-service washes than at other types of professional washes.

	Primary Vehicle Driven & Washed Most Often – 2002			
Car Wash Used Most Often	**Car**	**Van**	**Truck**	**SUV**
Home wash	41.4%	39.3%	54.8%	43.4%
Full-service wash	20.2%	15.3%	10.1%	17.5%
Exterior wash	13.1%	14.3%	6.6%	11.1%
Stationary automatic wash	12.4%	17.3%	9.0%	14.0%
Self-service wash	13.0%	13.8%	19.4%	14.0%

- When asked what type of car wash they *used most recently* in 1999 and 2002, respondents answered *home wash* more often than any other wash type.

Car Wash Used Most Recently



	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
2002	35%	20%	14%	15%	16%
1999	36%	18%	14%	15%	17%

Demographic Characteristics

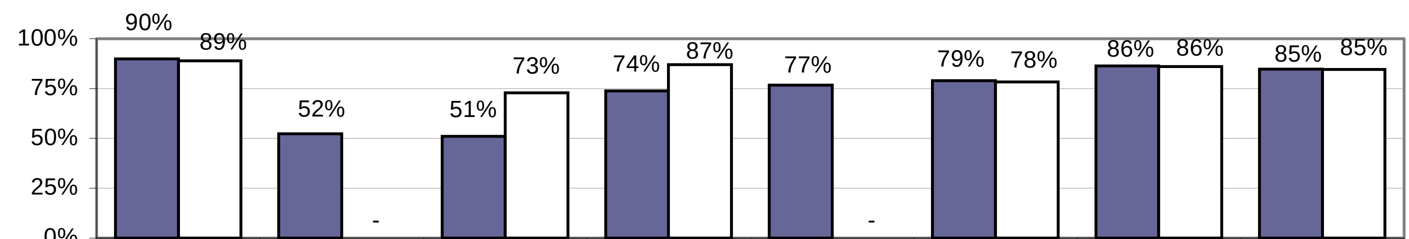
Washing Attitudes

Following these general questions, respondents were lead through a series of questions dealing with different aspects of car washing. Respondents were first asked to rate the importance of several factors in their selection of a car wash on a scale from 1 to 5, where 5 represents "Very Important" and 1 represents "Not very/Not at all Important." The factors were:

- Quality of wash
- Less work
- Faster overall
- Conveniently located
- Ease of use
- Cost
- Safety of your car's exterior
- Value (quality of wash for money spent)

- For customers who have *ever used* a professional car wash, *quality of wash* earned the highest overall mean score of 4.55 (89.9% top-two box net) followed by *safety of car's exterior* which received an overall mean score of 4.33 in 2002 (86.3% top-two box net) as the top two importance factors in the selection of a car wash. Mean scores were determined by totaling the value a factor received and dividing by the number of responses.

Overall Top-Two Box Net on Selection Factors for Ever Used Car Wash Customers



	Quality of wash	Less work	Faster overall	*Conveniently located	Ease of use	Cost	Safety of your car's exterior	Value
2002	90%	52%	51%	74%	77%	79%	86%	85%
1999	89%	-	73%	87%	-	78%	86%	85%

- = Not Applicable.
*In the 1999 survey, the selection factor "conveniently located" was defined only as "convenience."
Note: "Top-two box net" is the percentage of respondents who rated the factors a "4" or "5."

Aspects of Car Wash (In Mean Rank Order Based on 2002)	**Ever Used Car Wash Customers' Importance Ratings**	
	Mean - 2002	**Mean - 1999**
Quality of wash	4.55	4.34
Safety of your car's exterior	4.43	4.23
Value	4.33	4.13
Cost	4.19	4.06
Ease of use	4.07	-
*Conveniently located	4.01	4.30
Less work	3.48	-
Faster overall	3.46	3.87

- = Not Applicable.
*In the 1999 survey, the aspect "conveniently located" was defined only as "convenience."

Washing Attitudes – continued

- Customers are most satisfied with the *quality of wash for money spent* when home washing. They are most satisfied that *less work* is involved when washing at the full-service shop, the *ease of use* that is found at exterior *and* stationary automatic washes. They also believe that self-service washes are *conveniently located.*

Satisfaction (with End-Product) Ratings Mean (Top-two box net percent)	**Type of Car Wash Ever Used– 2002** Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Quality of the wash	4.61 (91.4%)	4.39 (89.9%)	4.00 (76.4%)	3.88 (68.0%)	4.11 (78.7%)
Less work	2.77 (27.5%)	4.52 (89.4%)	4.39 (87.8%)	4.41 (89.4%)	3.25 (42.8%)
Faster overall	3.18 (37.3%)	4.30 (82.3%)	4.32 (84.9%)	4.40 (88.4%)	3.59 (55.2%)
*Conveniently located	4.71 (93.1%)	4.10 (75.4%)	4.12 (78.4%)	4.25 (82.7%)	4.16 (80.4%)
Ease of use	4.20 (76.8%)	4.44 (89.3%)	4.41 (89.8%)	4.48 (92.2%)	4.05 (76.0%)
Cost	4.70 (92.5%)	3.56 (55.6%)	3.80 (64.4%)	3.89 (69.4%)	3.86 (68.2%)
Safety of car's exterior	4.70 (93.7%)	4.09 (75.8%)	3.84 (67.9%)	3.93 (69.7%)	4.09 (75.9%)
Quality of wash for money spent	4.71 (93.6%)	3.92 (70.0%)	3.81 (65.7%)	3.88 (67.0%)	3.90 (68.6%)

*In the 1999 survey, the aspect "conveniently located" was defined only as "convenience."
Note: "Top-Two Box Net" is the percentage of respondents who rated the factor a "4" (Important) or "5" (Very Important).

- Respondents were asked to choose three additional services they would like offered at the same location as a car wash, with "1" being their first choice, "2" being their second choice and "3" being the third choice for additional services. *Gas station* was ranked #1 by most respondents (53.4%). It received the best mean score rank, 1.63. *Tune up* was ranked #1 by the least number of respondents (13.1%) and *truck rental* received the worst mean score rank, 2.50.

Additional Services (In Mean Rank Order Based on 2002)	**2002** Overall Mean Score	**2002** Percent who ranked service #1	**1999** *Overall Mean Score	**1999** Percent who ranked service #1
Gas station	1.63	53.4%	1.88	52.9%
ATM	1.89	45.0%	3.57	21.3%
Express detailing	1.90	40.0%	3.62	23.1%
Oil change/Quick lube	1.90	34.1%	2.97	21.9%
Convenience store	2.05	25.9%	2.65	22.5%
Dry cleaner	2.08	26.0%	6.01	2.3%
Brakes	2.12	26.2%	5.35	4.1%
Other	2.18	31.7%	-	-
Paintless dent-repair	2.21	23.2%	-	-
Windshield repair	2.27	17.3%	5.42	6.4%
Quick-service restaurant	2.34	15.0%	3.97	9.4%
Water dispenser	2.35	20.9%	-	-
Gift shop	2.41	18.5%	-	-
Propane gas	2.44	13.6%	6.28	2.7%
Tune up	2.44	13.1%	4.93	4.0%
Truck rental	2.50	18.8%	7.17	1.0%

- = Not Applicable. Note: The means presented in this table are not weighted. *In 1999, respondents ranked up to 16 choices.

Washing Attitudes – continued

- According to respondents, the top-three most important factors in car wash selection (overall) are *spot-free rinse*, *wheel/hubcap cleaning* and *interior vacuuming* while *carpet shampooing* was stated as the least important factor in car wash selection. Less than 3 percent of the respondents reported that they *never go to a car wash*.

Important Factors in Car Wash Selection (In Percent Rank Order Based on 2002)	**2002**	**1999**
Spot-free rinse	56.8%	59.1%
Wheel/hubcap cleaning	53.4%	46.8%
Interior vacuuming	51.0%	58.3%
Under body wash	43.5%	44.9%
Hand towel drying	39.7%	43.6%
Wax/paint protectant coating	38.6%	43.6%
Hand wax/protectant application	13.8%	13.9%
Triple color protectant (foam) conditioner	9.9%	-
None of these are important	8.6%	12.9%
Carpet shampooing	6.9%	10.1%
Never go to car wash	2.3%	-

- = Not Applicable.

For the following question, a rating scale of 1 to 5, where "5" represents "Very Important" and "1" represents "Not very/Not at all Important," is used to determine the overall importance of having different car parts thoroughly cleaned and dried. This is compared with the overall mean score for how respondents rated the delivery of these services using a rating scale of 1 to 5, where "5" represents "Excellent" and "1" represents "Poor."

- The greatest overall difference between the importance score and the delivery score is found with having the *car body thoroughly cleaned*, where the importance mean score was 4.76, but the delivery of mean score was 4.36 in 2002.

Importance Rating of Thoroughly Cleaned or Dried Part (In Mean Rank Order Based on 2002)	**2002**		**1999**	
	Overall Mean Score	**Top-Two Box Net**	**Overall Mean Score**	**Top-Two Box Net**
Car body	4.76	93.1%	4.75	96.8%
Windshield	4.76	92.5%	4.78	96.1%
Windows	4.72	91.7%	4.74	95.8%
Wheels	4.09	71.8%	3.97	69.9%
Car thoroughly dried after wash	3.82	62.5%	-	-
Front dash/console	3.66	55.5%	3.68	60.6%
Mats/carpet	3.63	54.6%	3.64	59.6%
*the entire car	-	-	3.91	68.2%

Delivery Rating of Thoroughly Cleaned or Dried Part (In Mean Rank Order Based on 2002)	**2002**		**1999**	
	Overall Mean Score	**Top-Two Box Net**	**Overall Mean Score**	**Top-Two Box Net**
Windshield	4.41	82.9%	-	-
Car body	4.36	81.1%	4.34	85.5%
Windows	4.36	81.3%	4.28	83.0%
Wheels	4.00	69.0%	3.92	68.9%
Car thoroughly dried after wash	3.57	52.9%	-	-
Front dash/console	3.38	46.7%	3.41	52.5%
Mats/carpet	3.36	46.3%	3.36	50.0%
*the entire car	-	-	3.62	58.8%

- = Not Applicable.

Washing Attitudes – continued

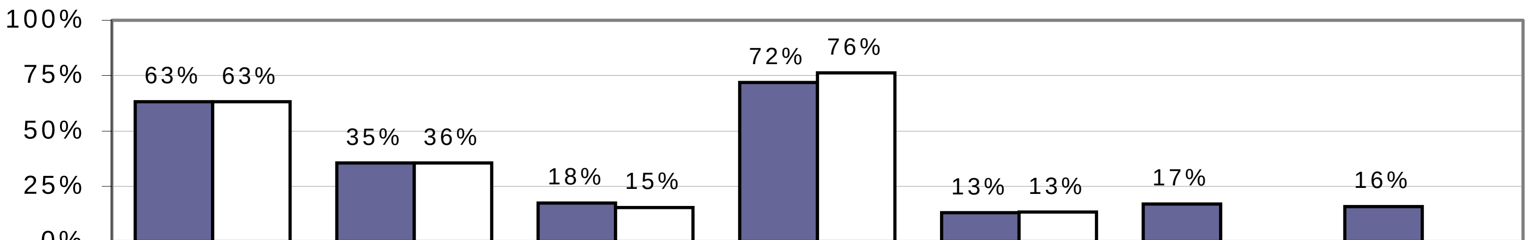
- Respondents were asked to choose which type of washing is better in a number of different areas. As in 1999 and 1996, the majority of respondents felt that home washing was better in all areas listed, except for *more convenient*, *more enjoyable*, *faster overall* and *less work*. Overall, the largest number of respondents felt home washing was *a lower cost* (90.2%) and *safer for the car* (82.7%). Overall, the largest number of respondents felt car washing was *less work* (93.0%) and *faster overall* (83.0%). More than half of respondents felt car washing was more enjoyable (58.7%) and more convenient (52.1%).

Which is better in the following areas?	2002		1999		1996	
	Home Wash	Car Wash	Home Wash	Car Wash	Home Wash	Car Wash
Safer for the environment	56.0%	44.0%	56.6%	35.0%	52.1%	33.7%
Safer for the car	82.7%	17.3%	81.2%	13.3%	78.5%	11.4%
A better overall quality of wash	61.3%	38.7%	67.6%	28.7%	67.0%	25.7%
A better overall value	78.8%	21.2	78.7%	16.7%	75.1%	15.1%
More convenient	47.9%	52.1%	42.1%	54.8%	42.9%	51.1%
A lower cost	90.2%	9.8%	87.5%	8.7%	83.1%	8.8%
More enjoyable	41.3%	58.7%	39.3%	54.4%	38.7%	51.0%
Faster overall	17.0%	83.0%	18.9%	77.5%	-	-
Less work	7.0%	93.0%	7.8%	87.9%	-	-

- = Not Applicable.

- The majority of respondents, overall, stated they would use a professional car wash more often if the *cost* was lower (71.9%) or *coupons* were available (63.3%). Along these same lines, 35.4 percent of overall respondents mentioned that a *frequent washer club* would get them to use a professional car wash more often.

Would Use Car Wash More Frequently, If...



	Coupons	Frequent washer club	VIP treatment	Lower cost	Portering option	If I had more time	If it took less time
2002	63%	35%	18%	72%	13%	17%	16%
1999	63%	36%	15%	76%	13%	-	-

- = Not Applicable.

Demographic Characteristics

Washing Habits

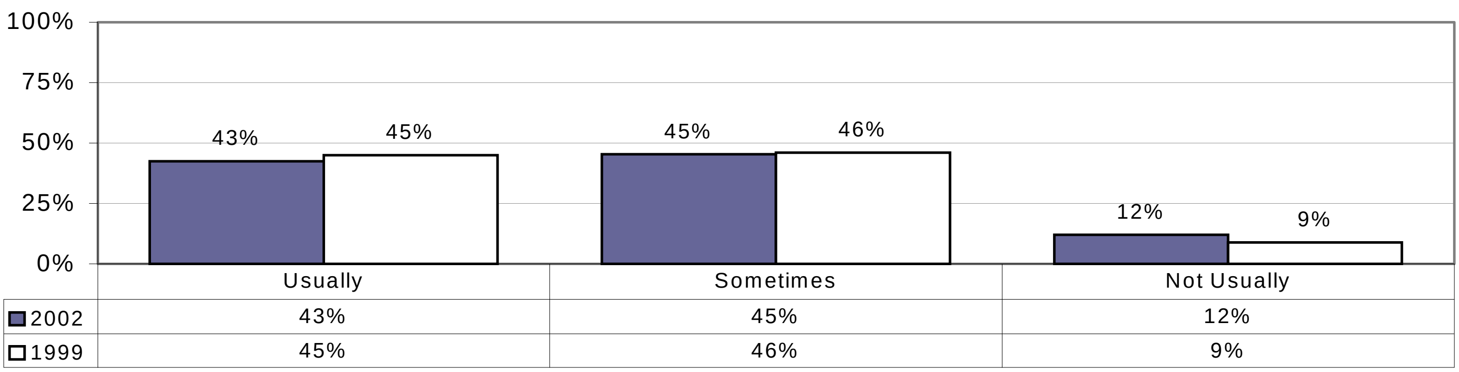
- Full-service, exterior, and stationary automatic wash customers were also asked what type of wash they use: spray, cloth, or hand. As in 1999 and 1996, in 2002 the majority of all wash type customers (i.e., full-service, exterior and stationary-automatic) indicated they use *high-pressure spray wash*.

Type of wash	2002 Full-service wash	2002 Exterior wash	2002 Stationary automatic wash	1999 Full-service wash	1999 Exterior wash	1999 Stationary-automatic wash	1996 Full-service wash	1996 Exterior wash	1996 Stationary automatic wash
Spray wash	48.5%	64.8%	55.9%	48.0%	61.6%	56.3%	59.4%	61.5%	47.6%
Cloth wash	28.0%	26.9%	22.2%	29.0%	24.9%	23.1%	32.9%	22.2%	29.4%
Hand wash	6.8%	1.8%	-	4.7%	1.1%	-	3.9%	1.1%	-
No response	16.7%	6.5%	21.9%	18.3%	12.4%	20.5%	7.3%	15.2%	19.5%

- = Not Applicable.

- Overall, a large majority (87.9%) of respondents stated that they *usually* or *sometimes* clean the interior of their car when they wash the exterior in 2002. In comparison, approximately 91% reported that they *usually* or *sometimes* cleaned the interior of their car when washing the exterior in 1999.

How Often Interior of Car is Cleaned



- Approximately 18.3 percent of the respondents used a full-service car wash in the past four weeks. Almost 88.7 percent of the full-service customers stated they washed their car one or two times during that period of time.

Type of car wash used in past four (4) weeks by all respondents	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
	33.2%	18.3%	15.3%	17.4%	17.0%
How often in the past four (4) weeks all respondents have washed their car at…					
One time	49.1%	59.1%	61.3%	55.0%	51.1%
Two times	28.9%	29.6%	24.6%	27.8%	27.3%
3 – 4 times	16.4%	9.3%	11.4%	14.0%	16.3%
Five or more times	5.6%	1.9%	2.7%	3.1%	5.3%

Washing Habits – continued

- Respondents were also asked how often in the past year that they had their car *professionally cleaned*, *detailed or washed at home*. The frequency of such use is reported in the table below.

How often in the past year have you done the following…	Number of times in the past year: 0 times	1-3 times	4-6 times	7-9 times	10-12 times	More than 12 times
Had your car professionally washed	46.2%	22.6%	11.7%	7.1%	5.8%	6.5%
Washed your car at home	23.1%	26.1%	17.6%	9.2%	8.9%	15.1%
Had your car detailed	81.3%	15.7%	1.7%	✲	✲	0.5%

✲ = Less than 0.5 percent.

- Responding stationary automatic (28.7%) and self-service customers (35.6%) tend to spend $2.51 to $4.50 when they get their vehicle professionally washed. Exterior customers (19.3%) tend to spend $5.51 to $6.50 for professional washing and full-service customers (24.1%) tend to spend $10.51 to $15.50.

Cost Spent for Professional Washing	2002: Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
$2.50 or less	1.3%	5.2%	12.2%	32.9%
$2.51 to $4.50	4.3%	16.0%	28.7%	36.5%
$4.51 to $5.50	6.2%	18.2%	24.9%	16.2%
$5.51 to $6.50	9.2%	19.3%	17.5%	7.4%
$6.51 to $7.50	9.2%	12.9%	9.3%	2.6%
$7.51 to $8.50	9.3%	11.5%	3.9%	1.8%
$8.51 to $10.50	19.8%	9.7%	2.4%	1.7%
$10.51 to $15.50	24.1%	6.0%	0.6%	0.6%
$15.51 to $25.50	13.3%	1.0%	✲	✲
More than $25.50	3.3%	✲	✲	✲

✲ = Less than 0.5 percent.

Consumer Market Segments

Overview

The International Carwash Association currently conducts consumer research every three years to explore car wash consumers' *behavior and usage* and in the past had limited attitudinal information. For example, consumers have been asked many questions regarding the types of car washes they use or have used, how often they use them, and the services of interest to them.

In our last survey conducted in 1999, only seven questions addressed consumers' attitudes about car washing. For example, consumers were asked about their level of agreement with statements such as "Having a clean car makes me feel good" and "It is a fun experience to get your car washed." Since we had not previously collected sufficient attitudinal data, we had only segmented consumers according to their behavior and usage patterns. This year, the International Carwash Association included additional attitudinal questions in order to segment consumers based upon their *attitudes*. This provides the ability to create groups of consumers that are *like-minded* about car washing. This process is called consumer market segmentation.

Consumer market segmentation is simply the process of dividing a large market of consumers into several smaller markets based upon various factors, such as demographics, behavior or attitudes. This allows for differentiated or targeted marketing, operating under the understanding that consumers with different wants and needs will respond differently to marketing communications.

Segmentation based on consumer *behavior and usage* allows for target marketing, perhaps reducing the cost of production, distribution and promotion. Consumer market segmentation based on *attitudes* takes market targeting one step further and allows car wash operators to discover the more subjective motivations that drive their customers' and potential customers' car washing decisions. An attitudinally based consumer market segmentation discerns consumer emotional needs by transcending the "who, what and where" aspects of the consumer purchase decision. Moreover, it tackles the more elusive but important question of *why* consumers make the choices that they make through methodical analysis of attitudinal consumer data.

By addressing the emotional needs of consumers, car wash operators can design marketing materials that produce a more lasting impact and greater results, target their marketing efforts to those segments of the marketplace that are most likely to be receptive, and ultimately build a stronger and more loyal customer base.

Attitudinal segmentation, along with our current behavior and usage data, allows operators to:

- More fully understand their market and *potential* markets to make more informed business decisions.
- Employ services with customer beliefs and needs (they will take care of my car, they will be fast, etc.).
- Find a niche and develop more efficient marketing methods against it.
- Build loyalty and thereby retain customers.

By conducting consumer market segmentation research in one large study, readers may now examine behavior and usage data for each attitudinal segment. This also allows an understanding of those segments and to assess their size.

Formation of Consumer Market Segments

Typically, attitudinal segments are formed based on consumers' level of agreement or disagreement with a list of statements. The International Carwash Association's Research Advisory Committee discussed industry trends and themes in order to develop 102 statements for survey respondents to rate. Examples of such statements included "My time is worth too much to spend it washing my car myself," "My car looks better when it comes out of a car wash than when I wash it myself," or "Nobody can wash my car as well as I can."

After the survey data was tabulated, respondents were clustered into segments based on their level of agreement or disagreement using statistical clustering techniques. A segment of consumers will typically *agree* more strongly with several statements, and *disagree* more strongly with several statements, compared to the group averages. Respondents' ratings of these attitude statements become the *defining core attitudes* of the segment and were used to determine how consumers best fit together.

Formation of Consumer Market Segments – continued

The International Carwash Association's research team identified five market segments in order to minimize inherent differences within each segment and to maximize differences between each segment. The five customer segments are identified as *Car Enthusiasts, Basic Transports, Indifferent Sloppy Sues, Service-seekers* and *Soccer Parents*. The chart below highlights the motivations, habits, defining attitudes, car washing needs and preferred wash methods for each group.

Organizing Principals	Consumer Market Segments: Car Enthusiasts	Basic Transports	Indifferent Sloppy Sues	Service-seekers	Soccer Parents
Motivations	- Enjoyment and relaxation. - Control. - Protects personal property.	- Function over appearance. - Quantity over quality. - Non-trusting.	- Seeks symbols of success. - Indifference. - Seasonal.	- Appearance is equal to function. - Quality over quantity. - Trusting.	- Convenience. - Faster overall process. - Values personal time.
Habits	- Perfectionist.	- Frugal/stingy	- Disorganized/messy.	- Loyal.	- Busy/Multi-tasks.
Defining Attitudes	- Particular about my car so I prefer to wash it myself. - Only get my car washed the way I want it when I do it myself. - Washing my car is relaxing. - Nobody can wash my car better than me. - My car is washed on a regular, routine basis.	- My car is just a way for me to get around. - Don't trust the products and services at car washes. - I don't use a car wash because I have the time to wash it myself. - Don't really care about the appearance of my car. - My car is not washed on a regular, routine basis.	- Need to have a clean car to impress my clients/ customers. - I'm likely to scratch or ding my car if I do it myself. - Most people who wash their car at home can't afford to go to a car wash. - I use a car wash because I don't have time to wash it myself. - Only wash my car for special occasions or after bad weather.	- Car washes can do things I don't have time to do. - I trust the products and services at car washes. - Going to a car wash is convenient. - Car washes can do things I am not capable of doing. - I hire out professional services whenever I can.	- Prefer to have someone else wash my car. - Car washes do a more professional job. - I consider washing my car to be a chore. - Car washes do a more professional job than I can do. - My time is worth too much to spend it washing my car.
Car Wash Needs	- Indulgence for my car. - Quality of wash.	- Strictly maintenance. - Cost.	- Seasonal benefits. - Quality of wash.	- Indulgence for me. - Quality of service.	- Must fit into schedule. - Ease of use.
Preferred Methods	- Home washing - Self-service wash	- Home washing - Self-service wash	- Self-service wash - Stationary automatic wash	- Full-service wash - Exterior wash	- Full-service wash - Exterior/Stationary automatic wash

Home Wash ← → **Car Wash**

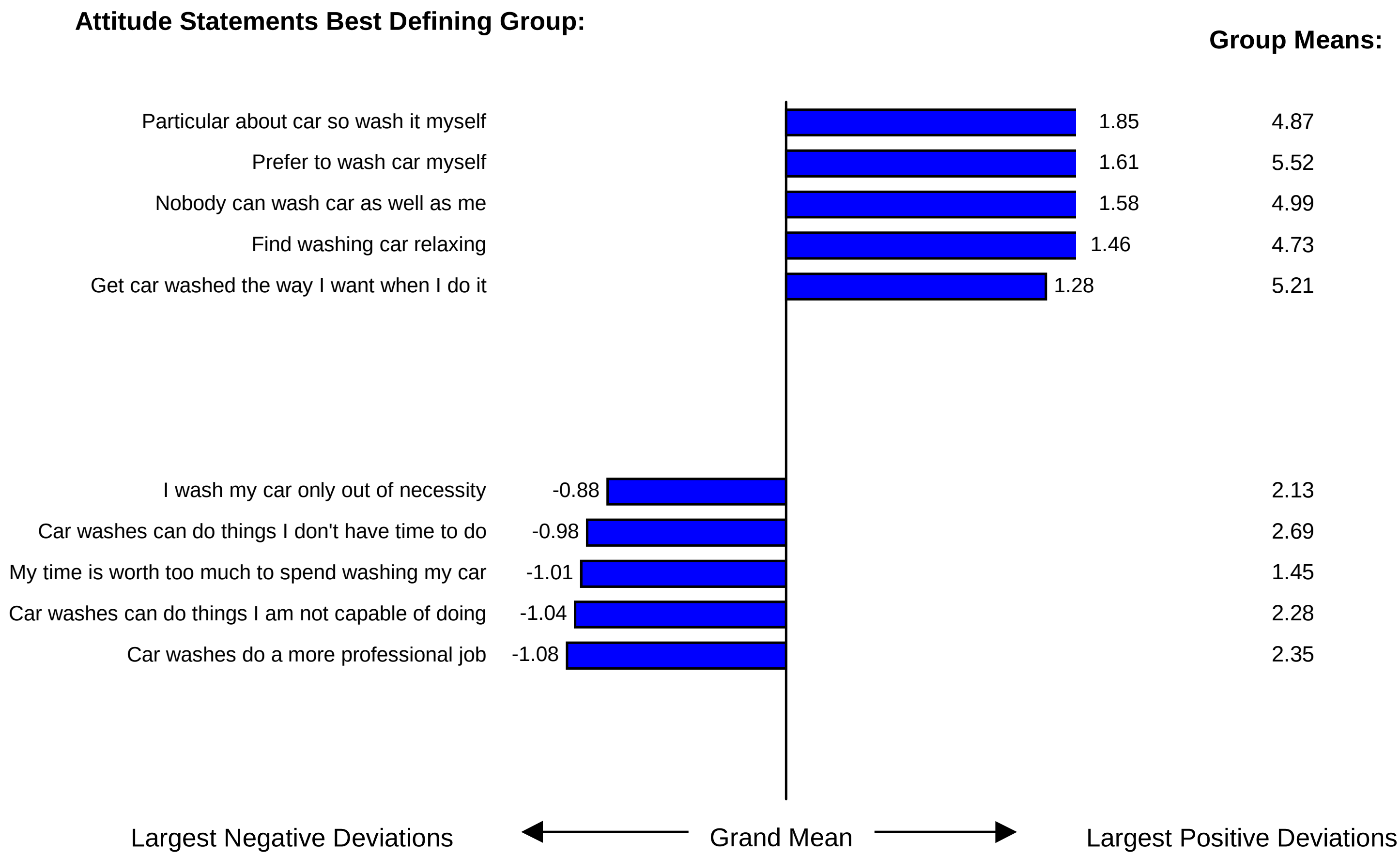
Formation of Consumer Market Segments – continued

Respondents were asked to rate their agreement with a series of statements about their attitudes and behaviors from six (“6”) being strongly agree to one (“1”) being strongly disagree. Based on these rating scores, respondents were then grouped into distinct profiles of attitudes, behaviors, motives, needs, wants and outlooks, regarding their car care. The following bar charts compare the “top” attitude statements (i.e., the largest, positive deviations) and the “bottom” attitude statements (the largest, negative deviations) from the grand means for each market segment.

The grand mean represents the overall rating score for all respondents and is represented by the vertical line in each graph. The deviations represent the segment’s mean response in relation to, or the distance away from, the grand mean. The more positive the deviation score, the more the group is in agreement with the attitude statement. The more negative the deviation score, the more the group is not in agreement with the attitude statement. For each market segment, the attitude statements listed are the attributes that best characterizes the group.

- *Car Enthusiasts* are individuals that are very particular about their car and therefore prefer to wash their car themselves. They believe that no one can wash their car as well as they can. They find car washing to be relaxing and they are able to get their car washed the way they want it when they wash it themselves. They do not wash their car out of necessity and they do not believe that car washes can do things that they are unable to do. They don’t feel that their time is worth too much to spend it washing their car.

Car Enthusiasts:
“Top” & “Bottom” Attitude Statements
(n) = 800

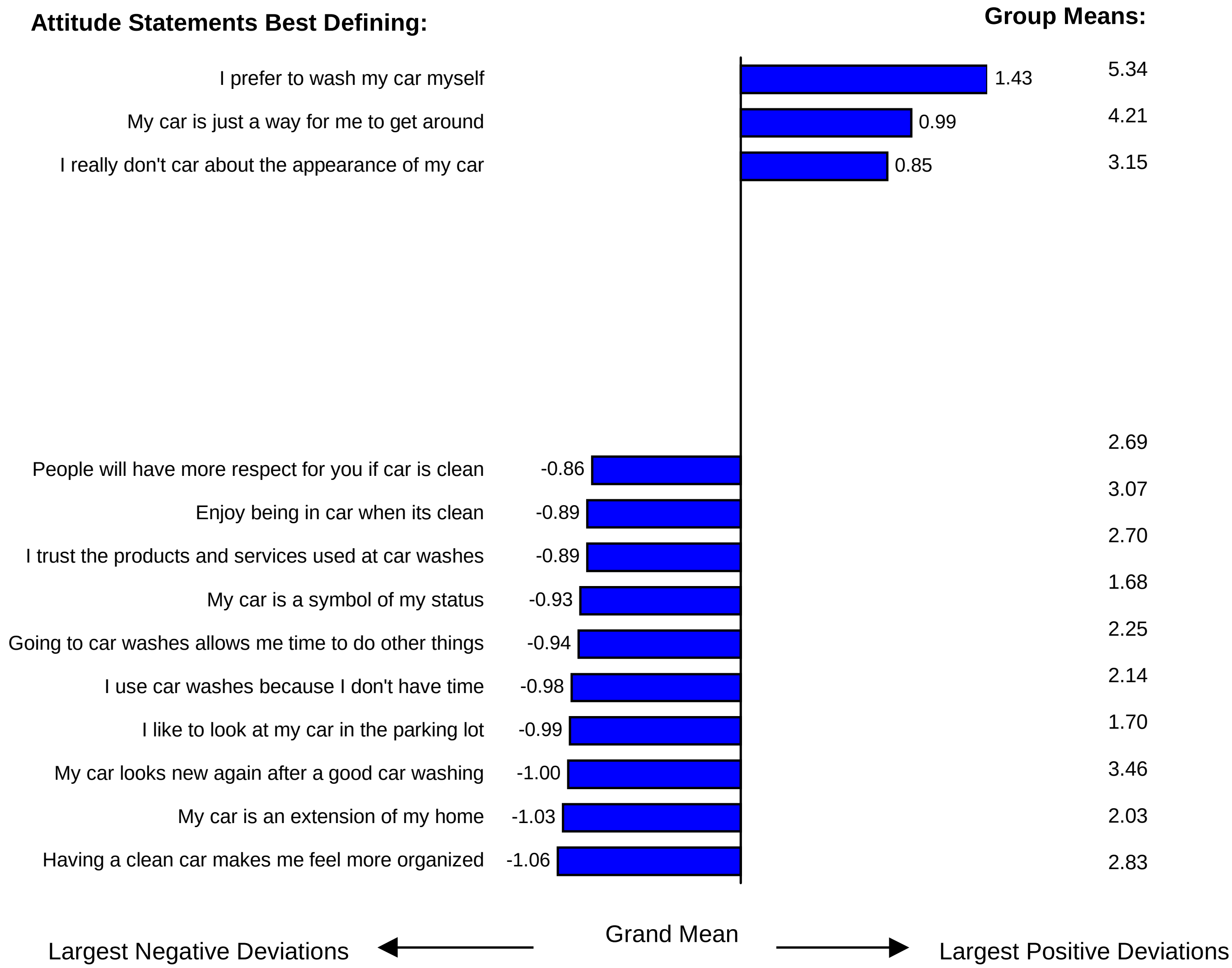


Rating Scale: “1” = Strongly Disagree to “6” = Strongly Agree

Formation of Consumer Market Segments – continued

♦ *Basic Transports* believe that their car is just a way for them to get around and they don't really care about its appearance. They don't believe that people will have more respect for them if their car is cleaned and they don't necessarily get enjoyment when their car is clean. They don't view their car as a symbol of their status and they prefer not to use car washes, but prefer to wash their car themselves. They don't believe their car looks new again after a good car washing and a clean car doesn't particularly make them feel more organized.

Basic Transports:
"Top" & "Bottom" Attitude Statements
(n) = 533

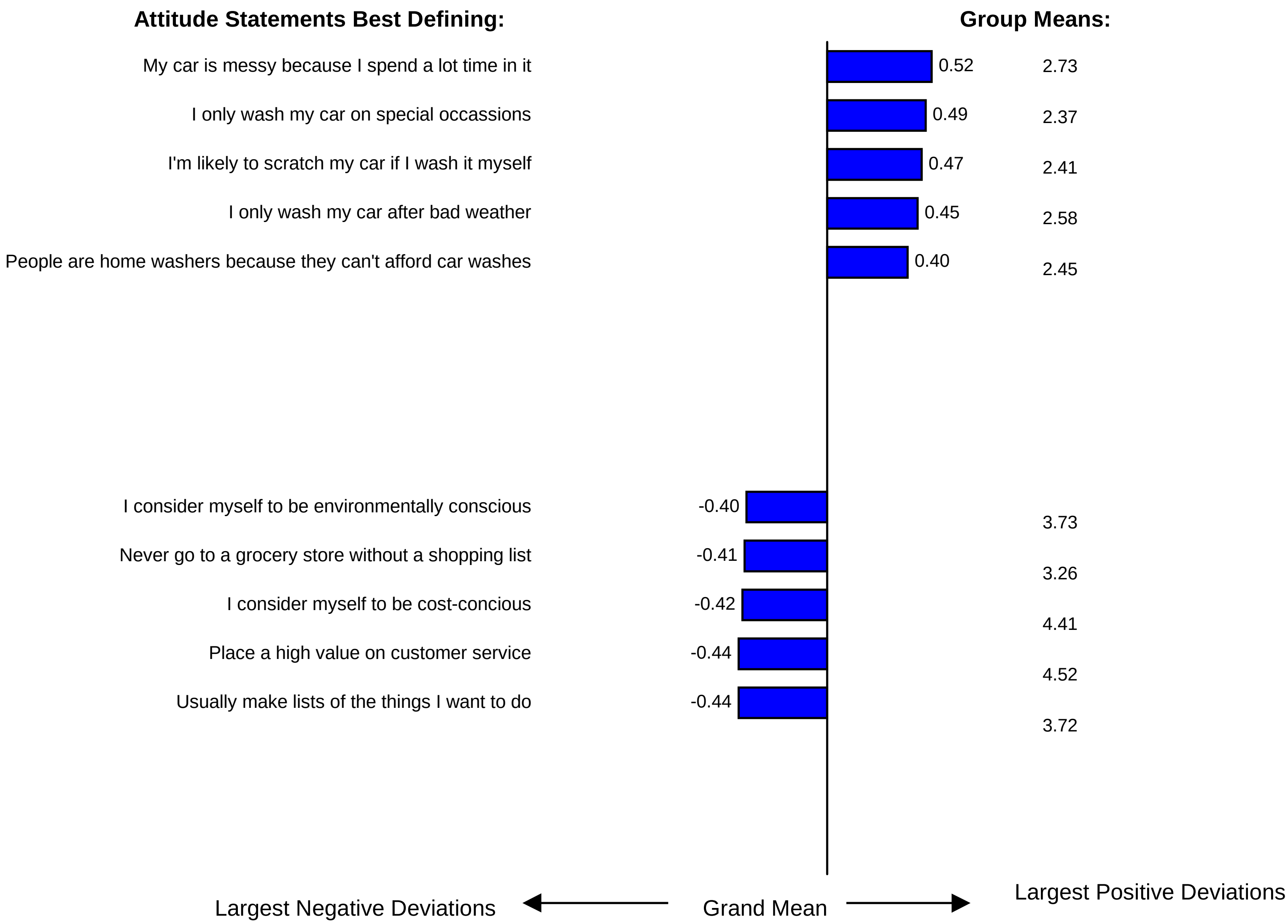


Rating Scale: "1" = Strongly Disagree to "6" = Strongly Agree

Formation of Consumer Market Segments – continued

- *Indifferent Sloppy Sues* believe their car is messy because they spend a lot of time in it, but they seek symbols of success. They tend to only wash their car for special occasions or after bad weather. They feel they are likely to scratch their car if they washed it themselves and believe that people are home washers because they can't afford to have their car professionally cleaned. They don't necessarily consider themselves to be environmentally conscious or cost conscious when they spend money. In addition, Indifferent Sloppy Sues never go to a grocery store with a shopping list and don't place a high value on customer service. These individuals usually do not make lists of the things they want to do.

Indifferent Sloppy Sues:
"Top" & "Bottom" Attitude Statements
(n) = 630

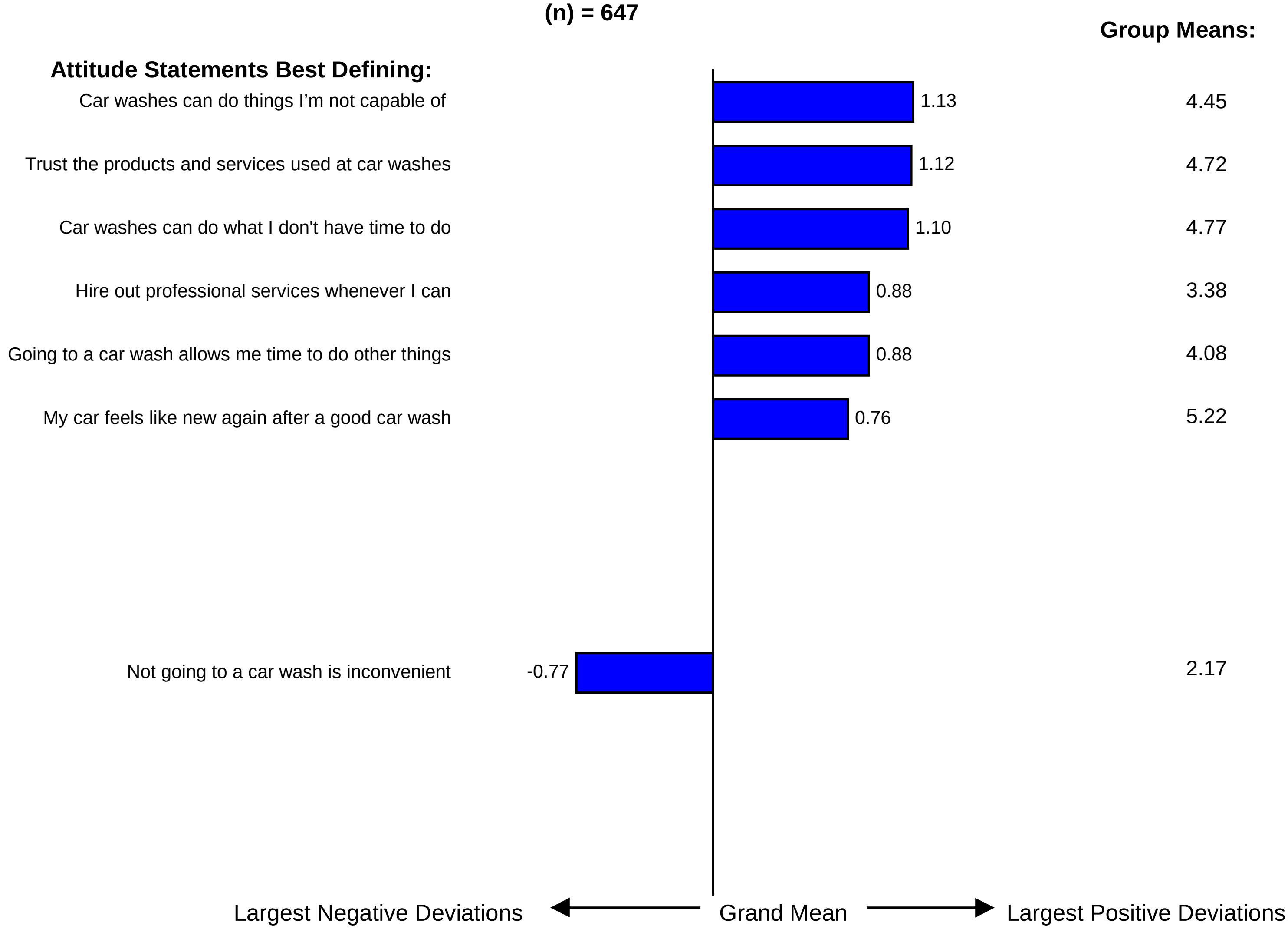


Rating Scale: "1" = Strongly Disagree to "6" = Strongly Agree

Formation of Consumer Market Segments – continued

- *Service-seekers* feel that car washes can do things that they are not capable of doing. They trust the products and services used and feel that professional car washes have time to do the things they don't have time to do. Not surprising, service-seekers hire out professional services whenever they can. Going to a car wash allows them time to do other things and they strongly believe that their car feels like new again after a good car washing. They believe that going to a car wash is convenient.

Service-seekers:
"Top" & "Bottom" Attitude Statements
(n) = 647

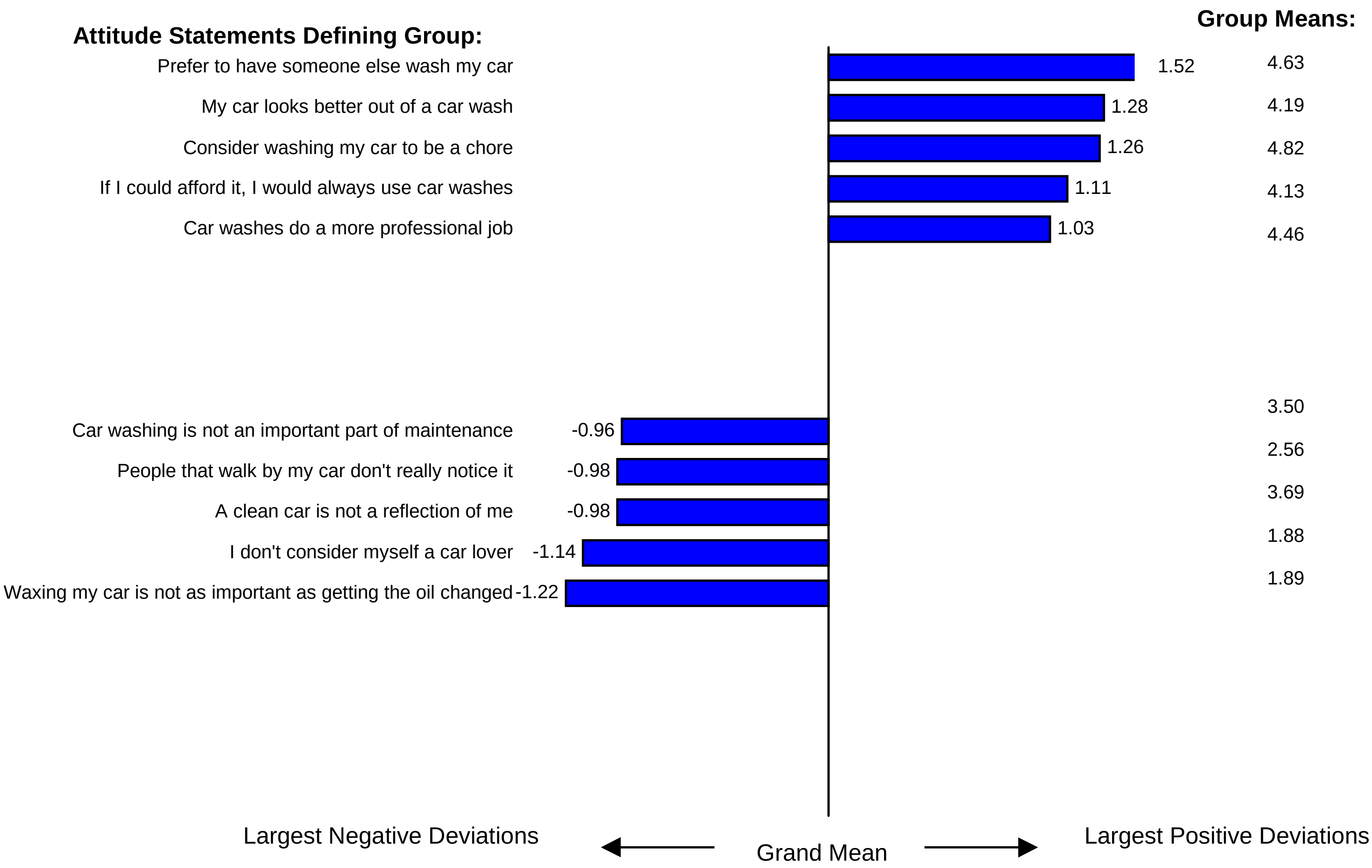


Rating Scale: "1" = Strongly Disagree to "6" = Strongly Agree

Formation of Consumer Market Segments – continued

- *Soccer Parents* prefer to have someone else wash their car. They believe their car looks better out of a car wash and that people walking by their car really notice it. They consider washing their car to be a chore and would always use a car wash if they could afford to. They further believe that car washing is an important part of maintenance and that car washes do a more professional job. Hence, they feel that a clean car is a reflection of them. These car lovers believe that washing their car is just as important as getting their oil changed.

Soccer Parents:
"Top" & "Bottom" Attitude Statements
(n) = 522



Rating Scale: "1" = Strongly Disagree to "6" = Strongly Agree

Consumer Market Segments

Demographic Characteristics

The table below shows *gender* by consumer market segment. Across segments, more respondents are *female* than *male*.

Consumer Market Segments	Gender			
	Male Head	Female Head	Other Male	Other Female
Car Enthusiasts	46.0%	49.9%	3.2%	0.9%
Basic Transports	36.9%	59.6%	1.4%	2.1%
Indifferent Sloppy Sues	45.8%	51.4%	1.5%	1.3%
Service-seekers	36.2%	62.2%	✻	1.4%
Soccer Parents	31.0%	67.3%	✻	1.5%

✻ = Less than 0.5% represented.

Note: “Other Male” and “Other Female” are comprised of household children, dependents or “other” members living in the establishment.

- Even though more consumers (except for Indifferent Sloppy Sues) reported being 60 years or older than any other age category, the difference is not significant. The average age for Car Enthusiasts and Basic Transports is 50 while the average age for Indifferent Sloppy Sues is 48.   The eldest groups are the Service-seekers and Soccer Parents because their average age is 53 years old.

Consumer Market Segments	Head of Household Age				
	Under 30	30 to 39	40 to 49	50 to 59	60 and Over
Car Enthusiasts	8.9%	15.1%	22.8%	22.9%	30.3%
Basic Transports	9.0%	17.2%	23.8%	19.4%	30.6%
Indifferent Sloppy Sues	11.2%	18.7%	25.8%	19.0%	25.4%
Service-seekers	5.9%	11.0%	17.9%	21.4%	43.9%
Soccer Parents	6.3%	16.0%	22.5%	19.5%	35.7%

- The table below shows the *total annual household income* for each consumer market segment.   In general, most consumers' total annual household income ranges from $20,000 to $59,999. Soccer Parents and Service-seekers are more likely to earn between $100,000 to over $150,000 than are Indifferent Sloppy Sues, Basic Transports or Car Enthusiasts.

	Total Annual Household Income						
Consumer Market Segments	Under $20,000	$20,000 to $39,999	$40,000 to $59,999	$60,000 to $74,999	$75,000 to $99,999	$100,000 to $149,999	$150,000 and Over
Car Enthusiasts	16.7%	25.3%	20.3%	10.2%	15.8%	8.9%	2.9%
Basic Transports	20.0%	27.6%	20.8%	6.0%	15.0%	8.9%	1.7%
Indifferent Sloppy Sues	19.0%	27.3%	19.1%	8.8%	15.3%	8.1%	2.4%
Service-seekers	13.0%	24.7%	18.7%	9.4%	19.8%	10.6%	3.8%
Soccer Parents	12.3%	24.0%	23.9%	10.7%	14.9%	10.2%	4.0%

Demographic Characteristics - continued

- The table below shows the regional location of each consumer market segment.

Consumer Market Segment	Regions								
	New England	Middle Atlantic	East North Central	West North Central	South Atlantic	East South Central	West South Central	Mountain	Pacific
Car Enthusiasts	7.7%	11.9%	13.3%	10.9%	13.0%	11.0%	12.0%	8.7%	11.6%
Basic Transports	11.3%	12.1%	9.4%	10.8%	13.0%	10.4%	8.9%	11.1%	13.1%
Indifferent Sloppy Sues	9.9%	10.1%	15.8%	11.5%	11.7%	9.4%	12.4%	9.1%	10.2%
Service-seekers	7.4%	13.5%	12.6%	9.7%	10.5%	8.2%	12.1%	11.5%	14.6%
Soccer Parents	9.6%	12.3%	11.4%	10.2%	13.5%	8.9%	11.2%	11.6%	11.2%

- The table below shows *population density* by consumer market segment. Across market segments, more consumers live in metropolitan areas of *over two million* than *under two million*.

Consumer Market Segment	Population Density			
	Non-MSA*	MSA (to ½ mil.)	MSA (½ mil – 2 mil.)	MSA (over 2 mil)
Car Enthusiasts	22.7%	20.3%	27.3%	29.7%
Basic Transports	25.8%	17.6%	26.5%	30.2%
Indifferent Sloppy Sues	27.6%	16.4%	26.3%	29.6%
Service-seekers	16.1%	18.0%	29.1%	36.8%
Soccer Parents	19.6%	17.7%	28.2%	34.4%

*MSA – Metropolitan Statistical Area
✻✻ = No data was submitted.

- The table below shows which *primary vehicle is driven and washed most often* by each consumer market segment. Other than driving a car, Car Enthusiasts are most likely to drive a truck or a SUV and Service-seekers as well as Basic Transports are most likely to drive vans.

Consumer Market Segment	Primary Vehicle Driven and Washed Most Often			
	Car	Van	Truck	SUV
Car Enthusiasts	60.1%	8.0%	17.6%	14.3%
Basic Transports	64.6%	14.6%	13.3%	8.5%
Indifferent Sloppy Sues	62.5%	11.4%	12.8%	13.3%
Service-seekers	69.5%	12.0%	6.9%	11.5%
Soccer Parents	68.7%	16.5%	6.9%	7.8%

Demographic Characteristics – continued

- The table below shows the *number of miles driven per week* by consumer market segment. Across markets, each consumer segment is more likely to drive *51 to 100 miles per week* than any other mileage category.

Consumer Market Segment	Number of Miles Driven Per Week					
	50 miles or less	51 to 100 miles	101 to 200 miles	201 to 300 miles	301 miles to 500 miles	Over 500 miles
Car Enthusiasts	22.2%	34.3%	25.8%	11.3%	4.8%	1.7%
Basic Transports	31.0%	32.5%	21.7%	10.5%	2.9%	1.4%
Indifferent Sloppy Sues	19.5%	35.2%	23.6%	13.1%	6.0%	2.6%
Service-seekers	23.4%	31.3%	26.4%	12.9%	5.0%	1.0%
Soccer Parents	26.4%	31.3%	23.2%	12.0%	5.1%	1.9%

- = No data was submitted.

- The table below shows the *household size* by consumer market segment. According to respondents, more Indifferent Sloppy Sues tend to live in *households of three or four* than any other consumer segment and Basic Transports are more likely to live in *households of five or more* than any other market segment.

Consumer Market Segments	Household Size				
	One	Two	Three	Four	Five or more
Car Enthusiasts	21.2%	47.6%	12.9%	12.1%	6.2%
Basic Transports	26.8%	37.7%	13.3%	13.1%	9.0%
Indifferent Sloppy Sues	26.8%	33.5%	16.5%	15.7%	7.5%
Service-seekers	30.6%	43.7%	10.5%	9.8%	5.5%
Soccer Parents	30.5%	37.5%	14.9%	9.6%	7.4%

- The table below shows the *marital status* of each consumer market segments. Across groups, most responding consumers were *married*.

Consumer Market Segments	Marital Status				
	Married	Widowed	Divorced	Separated	Never Married
Car Enthusiasts	66.7%	6.7%	13.5%	1.0%	12.1%
Basic Transports	62.3%	7.6%	12.8%	1.9%	15.4%
Indifferent Sloppy Sues	59.9%	6.4%	13.0%	1.2%	19.5%
Service-seekers	58.3%	13.6%	14.8%	1.2%	12.0%
Soccer Parents	57.9%	11.8%	13.8%	1.2%	15.3%

Consumer Market Segments

Type of Washing

Respondents were asked to indicate which specific type of car washes they *ever used*, *use most often* and *used most recently*. The wash categories and their definitions shown in this report are:

- **Home wash:** washing your car at home
- **Full-service conveyor car wash:** car is pulled through the wash by a conveyor and extra services such as interior cleaning and waxing are offered
- **Exterior conveyor car wash:** car is pulled through the wash by a conveyor and the outside of the car is washed
- **Stationary automatic car wash:** car is washed automatically but car does not move
- **Self-service coin-operated car wash:** car wash facility where you wash your car yourself using coin-operated washing equipment
- **Charity (car) wash:** car wash offered by a school, church or other community organization or group to raise money for a charity or event

Charity customers were not included in the analysis of this report because of their small respondent base. Only 1.0 percent of the respondents reported that they most often use charity washes.

- The following table shows how each consumer market segment responded to survey questions that refers to the types of car *washes ever used*, *used most often* and *used most recently*. Not surprising, more than 40% of all consumer markets have used each of the five types of car washes listed below. However, Service-seekers and Soccer Parents prefer to use professional car washing to clean their cars than to wash them at home. Both groups washed their cars *most recently* at a full-service shop.

	Consumer Market Segments				
Consumer Market Segment	**Car Enthusiasts**	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Types of Car Washes Ever Used					
Home Wash	93.6%	91.6%	87.2%	71.1%	75.4%
Full-service wash	41.8%	30.2%	45.3%	74.0%	65.5%
Exterior wash	48.0%	44.9%	51.1%	62.9%	62.0%
Stationary automatic wash	40.7%	37.3%	51.5%	45.7%	46.2%
Self-service wash	63.2%	57.4%	65.8%	45.9%	50.4%
Types of Car Washes Used Most Often					
Home Wash	72.6%	73.8%	37.7%	7.7%	16.2%
Full-service wash	3.4%	3.1%	11.8%	43.4%	31.7%
Exterior wash	4.1%	3.1%	13.2%	22.5%	19.3%
Stationary automatic wash	5.6%	4.0%	16.9%	18.5%	21.7%
Self-service wash	14.3%	15.9%	20.4%	8.0%	11.0%
Types of Car Washes Used Most Recently					
Home Wash	57.5%	58.4%	34.1%	7.9%	14.1%
Full-service wash	6.9%	5.9%	12.3%	42.2%	32.9%
Exterior wash	8.1%	6.4%	13.6%	23.3%	20.3%
Stationary automatic wash	6.9%	9.3%	18.5%	18.9%	23.3%
Self-service wash	20.6%	20.0%	21.5%	7.8%	9.4%

Washing Attitudes

Shown below are ratings for each consumer market segment's use of different types of car washes. Respondents were first asked to rate the importance of several factors in their selection of a car wash on a scale from 1 to 5 where 5 = "Very Important" and 1 = "Not very/Not at all Important." The factors were:

- Quality of wash
- Less work
- Faster overall
- Conveniently located
- Ease of use
- Cost
- Safety of your car's exterior
- Customer service
- Value (quality of wash for money spent)

- As shown in the table below, Car Enthusiasts, Indifferent Sloppy Sues and Service-seekers believe that the *quality of the wash* is the most important factor in their selection of a car wash. In comparison, Basic Transports are most concerned with the *cost* of the car wash and Soccer Parents are most interested in the *ease of using* the car wash.

Selection Factors	**Consumer Market Segments**				
Importance Ratings Mean (Top-two box net percent)	**Car Enthusiasts**	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Quality of the wash	4.77 (95.7%)	4.27 (79.8%)	4.44 (88.7%)	4.78 (96.2%)	4.40 (85.3%)
Less work	2.99 (35.7%)	3.05 (36.9%)	3.55 (53.1%)	3.97 (68.5%)	3.95 (70.4%)
Faster overall	3.07 (39.1%)	3.13 (39.4%)	3.56 (52.6%)	3.85 (63.3%)	3.71 (61.4%)
Conveniently located	3.88 (68.5%)	3.77 (65.3%)	3.98 (74.9%)	4.22 (81.1%)	4.16 (78.8%)
Ease of use	3.93 (69.1%)	3.85 (67.4%)	3.98 (76.1%)	4.35 (87.0%)	4.28 (86.3%)
Cost	4.12 (75.1%)	4.34 (83.3%)	4.13 (78.4%)	4.20 (80.3%)	4.20 (79.4%)
Safety of car's exterior	4.71 (93.3%)	4.13 (77.9%)	4.30 (84.0%)	4.65 (92.6%)	4.20 (79.9%)
Customer service	3.68 (60.1%)	3.21 (42.2%)	3.59 (55.2%)	4.15 (76.1%)	3.63 (55.9%)
Value (quality of wash for money spent)	4.37 (84.4%)	4.22 (80.9%)	4.24 (84.0%)	4.50 (91.1%)	4.25 (83.9%)

Note: Top-Two Box Net represents the percentage of respondents rating the part a "4" or "5."

The tables on the following pages compare how each consumer market segment rates their perception of the delivery of these factors for each type of car wash. Each type of car wash attribute (e.g., *quality of wash*) was rated on a scale from 1 to 5 where 5 = "Excellent" and 1 = "Poor."

Washing Attitudes - continued

- Car Enthusiasts are most satisfied with the *quality* of their home washing, believe that full-service shops are *less work*, enjoy the *ease of using* exterior and stationary automatic washes and believe that self-service washes ensure the *safety of their car's exterior*.

Selection Factors Mean (Top-two box net percent)	**Car Enthusiasts' Delivery Ratings of…** Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Quality of the wash	4.85 (98.9%)	4.00 (71.2%)	3.72 (61.8%)	3.43 (48.8%)	3.89 (68.8%)
Less work	2.83 (30.9%)	4.44 (86.0%)	4.22 (80.1%)	4.15 (78.1%)	3.15 (37.8%)
Faster overall	3.21 (39.8%)	4.04 (71.5%)	4.08 (74.7%)	4.06 (75.5%)	3.44 (46.9%)
Conveniently located	4.78 (94.5%)	3.56 (53.7%)	3.61 (53.8%)	3.85 (67.0%)	3.86 (67.2%)
Ease of use	4.34 (80.9%)	4.25 (81.8%)	4.18 (81.8%)	4.20 (80.5%)	3.85 (67.1%)
Cost	4.76 (93.2%)	2.88 (30.0%)	3.21 (38.4%)	3.41 (48.6%)	3.56 (52.9%)
Safety of car's exterior	4.88 (97.7%)	3.42 (48.6%)	3.31 (44.8%)	3.49 (53.4%)	4.00 (71.8%)
Value (quality of wash for money spent)	4.82 (96.7%)	3.26 (40.9%)	3.27 (40.9%)	3.36 (46.9%)	3.60 (54.9%)

- Basic Transports are most satisfied with the *value* of home washing, but believe that full-service, exterior and stationary automatic washes require *less work* to clean their vehicles. They like the *quality of wash* that self-service shops provide.

Selection Factors Mean (Top-two box net percent)	**Basic Transports Delivery Ratings of…** Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Quality of the wash	4.55 (90.1%)	4.11 (79.5%)	3.75 (66.2%)	3.46 (51.3%)	3.92 (71.1%)
Less work	2.48 (16.6%)	4.56 (90.6%)	4.41 (89.7%)	4.18 (80.7%)	2.91 (27.7%)
Faster overall	2.91 (27.9%)	3.95 (71.8%)	4.26 (83.8%)	4.10 (78.7%)	3.25 (38.7%)
Conveniently located	4.67 (91.2%)	3.22 (43.7%)	3.51 (51.4%)	3.58 (52.6%)	3.76 (62.2%)
Ease of use	4.09 (71.7%)	4.18 (80.9%)	4.22 (84.0%)	4.12 (79.5%)	3.72 (60.6%)
Cost	4.72 (91.8%)	2.64 (23.3%)	3.13 (37.5%)	3.14 (38.6%)	3.55 (54.3%)
Safety of car's exterior	4.65 (91.5%)	3.45 (47.5%)	3.34 (46.2%)	3.38 (44.1%)	3.90 (67.4%)
Value (quality of wash for money spent)	4.70 (92.2%)	3.09 (32.7%)	3.18 (37.7%)	3.14 (35.7%)	3.69 (57.9%)

Note: The rating scales used for the tables on this page were 1 to 5 where 5 = "Excellent" and 1 = "Poor." Top-Two Box Net represents the percentage of respondents rating the factor a "4" or "5."

Washing Attitudes - continued

- Indifferent Sloppy Sue's rated home washing the highest as the *safest for the car's exterior*. In comparison, full-service and exterior washes were rated the highest for offering the *least amount of work*. Stationary automatic washes were rated for being the *easiest to use* and self-service washes were rated for providing the best *quality of wash*.

Selection Factors Mean (Top-two box net percent)	Indifferent Sloppy Sues' Delivery Ratings of…				
	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Quality of the wash	4.39 (86.5%)	4.18 (84.2%)	3.90 (73.9%)	3.66 (57.0%)	3.86 (70.9%)
Less work	2.55 (20.6%)	4.39 (87.0%)	4.24 (85.3%)	4.11 (77.3%)	3.09 (33.8%)
Faster overall	2.82 (26.4%)	4.02 (72.9%)	4.14 (81.4%)	4.03 (75.0%)	3.31 (41.8%)
Conveniently located	4.48 (87.5%	3.58 (56.7%)	3.77 (64.4%)	3.81 (64.9%)	3.73 (61.8%)
Ease of use	3.81 (64.0%)	4.10 (81.8%)	4.16 (83.3%)	4.13 (80.1%)	3.70 (61.3%)
Cost	4.50 (88.3%)	3.15 (37.9%)	3.46 (48.9%)	3.61 (56.4%)	3.62 (57.1%)
Safety of car's exterior	4.51 (90.1%)	3.68 (61.4%)	3.57 (53.8%)	3.70 (56.6%)	3.91 (70.8%)
Value (quality of wash for money spent)	4.45 (88.2%)	3.53 (51.3%)	3.52 (51.1%)	3.53 (50.4%)	3.62 (55.1%)

- For Service-seekers, full-service washes provide the best *quality of wash* and exterior as well as stationary automatic washes are the *easiest to use*. These consumers believe that home washing followed by self-service washing is *the safest for their car's exterior*.

Selection Factors Mean (Top-two box net percent)	Service-seekers' Delivery Ratings of…				
	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Quality of the wash	4.17 (75.9%)	4.50 (92.1%)	4.05 (75.7%)	3.71 (58.0%)	3.65 (57.0%)
Less work	1.96 (11.2%)	4.58 (91.9%)	4.35 (86.5%)	4.22 (80.7%)	2.34 (11.4%)
Faster overall	2.16 (13.0%)	4.31 (83.2%)	4.30 (84.5%)	4.23 (78.6%)	2.65 (16.8%)
Conveniently located	4.45 (85.1%)	4.07 (74.4%)	4.09 (76.4%)	4.10 (74.1%)	3.63 (55.4%)
Ease of use	3.18 (41.3%)	4.47 (90.2%)	4.36 (87.2%)	4.30 (83.4%)	3.20 (38.2%)
Cost	4.48 (85.6%)	3.56 (57.5%)	3.84 (69.3%)	3.86 (66.9%)	3.64 (60.7%)
Safety of car's exterior	4.47 (85.7%)	4.19 (81.3%)	3.89 (69.1%)	3.77 (62.0%)	3.87 (65.9%)
Value (quality of wash for money spent)	4.28 (77.9%)	3.96 (72.5%)	3.83 (68.1%)	3.74 (57.9%)	3.49 (47.8%)

Note: The rating scales used for the tables on this page was 1 to 5 where 5 = "Excellent" and 1 = "Poor." Top-Two Box Net represents the percentage of respondents rating the factor a "4" or "5."

Washing Attitudes - continued

♦ Soccer Parents are most satisfied that full-service shops require *less work*. They believe that home washing followed by self-service washing is the safest for their car's exterior and exterior as well as stationary automatic washes are the easiest to use.

Selection Factors Mean (Top-two box net percent)	Soccer Parents' Delivery Ratings of… Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Quality of the wash	3.87 (63.5%)	4.35 (88.6%)	3.88 (69.2%)	3.60 (54.1%)	3.59 (57.9%)
Less work	1.80 (9.5%)	4.62 (92.6%)	4.38 (85.7%)	4.34 (85.0%)	2.59 (22.7%)
Faster overall	1.98 (11.3%)	4.20 (78.9%)	4.31 (82.3%)	4.18 (78.9%)	2.75 (23.3%)
Conveniently located	4.36 (83.1%)	3.75 (62.2%)	3.92 (66.9%)	3.98 (70.4%)	3.66 (59.2%)
Ease of use	2.95 (35.2%)	4.47 (90.6%)	4.37 (85.4%)	4.37 (88.1%)	3.36 (48.1%)
Cost	4.46 (84.6%)	3.17 (40.7%)	3.63 (54.8%)	3.81 (62.5%)	3.56 (58.6%)
Safety of car's exterior	4.32 (82.8%)	3.92 (69.1%)	3.63 (57.1%)	3.67 (56.5%)	3.82 (65.4%)
Value (quality of wash for money spent)	4.23 (76.3%)	3.67 (61.9%)	3.59 (53.0%)	3.62 (54.5%)	3.45 (46.5%)

Note: Top-Two Box Net represents the percentage of respondents rating the part a "4" or "5."

A list of additional services that could be offered at the same location as a car wash were provided in the survey. Respondents were asked to rank each service in order of importance, where 1 = "Primary Choice," 2 = "Secondary choice," etc. The means shown in the table below are not weighted.

♦ Overall, most consumers rated *gas station* their first choice, except for Car Enthusiasts who rated *truck rental* the highest (1.00). Interestingly, Basic Transports and Service-seekers rated this aspect (i.e., *truck rental*) the lowest.

Additional Services	Consumer Market Segments Car Enthusiasts	Basic Transports	Indifferent Sloppy Sues	Service-seekers	Soccer Parents
ATM	1.94	1.92	1.84	1.87	1.90
Brakes	2.18	2.37	2.16	1.87	2.24
Convenience store	2.03	2.00	2.03	2.09	2.11
Dry cleaner	2.00	2.36	1.88	2.02	2.38
Express Detailing	1.94	1.83	2.06	1.86	1.84
Gas station	1.57	1.68	1.64	1.62	1.67
Oil change/Quick lube	1.92	1.84	1.94	1.97	1.81
Propane gas	2.68	2.33	2.50	2.39	2.10
Quick-service restaurant	2.42	2.41	2.31	2.21	2.38
*Truck rental	1.00	3.00	2.50	3.00	2.25
Tune up	2.38	2.51	2.53	2.44	2.39
Windshield repair	2.22	2.31	2.29	2.32	2.31
Water dispenser	2.42	2.22	2.37	2.44	2.23
Paintless dent-repair	2.20	2.26	2.19	2.18	2.26
Gift shop	2.50	2.45	2.37	2.33	2.44
Other	1.93	2.20	2.13	2.40	2.20

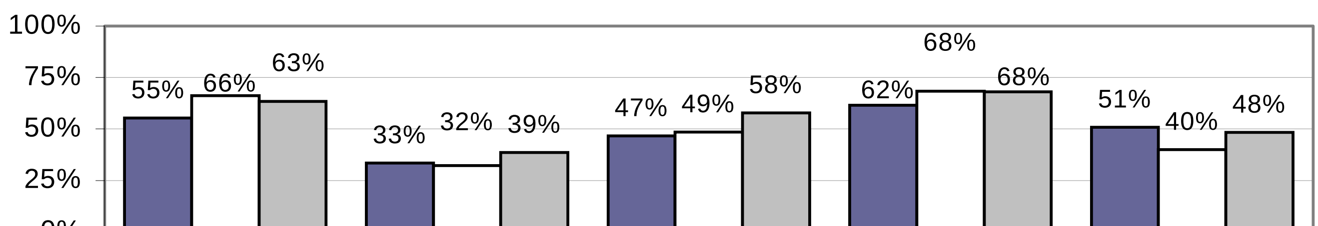
*Note: The sample size for this additional service (i.e., truck rental) was significantly small (less than five respondents reporting). Therefore, use caution when reviewing, discussing or making decisions based on this finding.

Washing Attitudes – continued

- In general, each consumer market segment ranked their top five important extra services differently. Across consumer markets, however, carpet shampooing was identified as being the least important selection factor when choosing a professional car wash. Consumer market segments preferences for extra services are shown in the table and graph below.

	Consumer Market Segments				
Importance of Extra Services	**Car Enthusiasts**	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Interior vacuuming	55.3%	33.3%	46.6%	61.6%	50.9%
Wheel/hubcap cleaning	66.2%	32.1%	48.5%	68.3%	40.0%
Wax/paint protectant coating	42.0%	25.4%	40.8%	47.1%	31.8%
Under body wash	47.2%	31.9%	42.1%	49.7%	41.4%
Carpet shampooing	7.9%	2.0%	5.1%	10.7%	5.6%
Spot-free rinse	63.4%	38.5%	57.7%	68.3%	48.3%
Hand wax/protectant application	19.5%	6.7%	12.8%	17.4%	8.0%
Hand towel drying	47.8%	18.0%	30.0%	56.0%	35.6%
Triple color protectant (foam) conditioner	10.8%	3.5%	10.3%	14.8%	6.6%
None of these are important	2.8%	21.2%	8.2%	2.9%	13.7%
Never go to car wash	2.5%	6.9%	2.4%	1.0%	1.0%

Top Three Important Extra Services for Consumer Market Segments



	Car Enthusiasts	Basic Transports	Indifferent Sloppy Sues	Service-seekers	Soccer Parents
Interior Vacuuming	55%	33%	47%	62%	51%
Wheel/hubcap cleaning	66%	32%	49%	68%	40%
Spot-free rinse	63%	39%	58%	68%	48%

Washing Attitudes – continued

A rating scale of 1 to 5, where 5 = “Very Important” and 1 = “Not very/Not at all Important” was used to determine the importance for consumers of having different parts of their car thoroughly cleaned or dried. This is compared with the mean score for how consumers rated the delivery of these services.

- All consumers (except for Basic Transports) rated having a *thoroughly clean car body* as the most important factor in judging the quality of a car wash. For Basic Transports rated the most important factor in judging the quality of a car wash was *windshield* with a mean score of 4.71 (93.2% top-two box net). Across groups, however, the delivery mean score for *windshield being thoroughly cleaned* was rated the highest.

Importance Rating of Thoroughly Cleaned or Dried Part Mean (Top-two box net percent)	**Consumer Market Segments**				
	Car Enthusiasts	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Wheels	4.47 (84.8%)	3.75 (59.6%)	3.93 (69.8%)	4.35 (81.7%)	3.70 (60.1%)
Windshield	4.84 (94.0%)	4.71 (93.2%)	4.62 (91.5%)	4.87 (97.0%)	4.72 (94.4%)
Windows	4.80 (93.3%)	4.65 (92.2%)	4.55 (90.1%)	4.86 (96.8%)	4.69 (93.7%)
Car body	4.89 (96.4%)	4.62 (91.2%)	4.63 (93.7%)	4.88 (97.0%)	4.73 (94.9%)
Mats/carpets	3.98 (67.2%)	3.27 (42.3%)	3.43 (47.5%)	3.86 (65.5%)	3.35 (45.8%)
Front dash/console	3.96 (66.0%)	3.27 (43.1%)	3.48 (49.4%)	3.91 (67.7%)	3.39 (47.7%)
The car dried thoroughly after the wash	4.17 (74.4%)	3.23 (44.7%)	3.68 (57.7%)	4.21 (78.1%)	3.53 (53.0%)

Delivery Rating of Thoroughly Cleaned or Dried Part Mean (Top-two box net percent)	**Consumer Market Segments**				
	Car Enthusiasts	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Wheels	4.37 (79.8%)	3.96 (68.4%)	3.82 (67.5%)	4.02 (74.1%)	3.68 (58.0%)
Windshield	4.60 (87.1%)	4.48 (86.2%)	4.23 (81.7%)	4.43 (87.5%)	4.27 (81.9%)
Windows	4.56 (86.1%)	4.43 (84.1%)	4.19 (79.6%)	4.38 (85.8%)	4.23 (80.1%)
Car body	4.59 (85.1%)	4.38 (82.3%)	4.18 (79.5%)	4.36 (85.3%)	4.22 (83.2%)
Mats/carpets	3.92 (62.2%)	3.45 (50.3%)	3.16 (39.8%)	3.22 (45.4%)	2.79 (32.6%)
Front dash/console	3.95 (62.9%)	3.44 (49.0%)	3.15 (38.9%)	3.26 (46.5%)	2.83 (34.8%)
The car dried thoroughly after the wash	4.01 (65.9%)	3.35 (48.4%)	3.35 (45.1%)	3.66 (60.4%)	3.22 (44.3%)

Note: Top-Two Box Net represents the percentage of respondents rating the part a “4” or “5.”

Washing Attitudes – continued

- In 2002, the greatest influence over whether consumers (except for Car Enthusiasts) might go to a car wash was for *special prices/discount coupons.* Car Enthusiasts reported that washing their car *for a special occasion* was the most influential factor for them (mean = 3.26/5.0). This question was based on a rating scale of 1 to 5 where 5 = "A great deal of influence" and a 1 = "Little or no influence."

Factors Influencing Use of Car Wash Mean (Top-two box net percent)	**Consumer Market Segments**				
	Car Enthusiasts	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Recommendations of a friend	2.38 (26.8%)	2.14 (18.7%)	2.65 (26.2%)	2.67 (30.0%)	2.36 (22.2%)
Advertisements	2.06 (13.8%)	1.93 (10.1%)	2.40 (17.5%)	2.51 (22.1%)	2.30 (15.6%)
Special prices/discount coupons	3.16 (49.6%)	3.14 (48.3%)	3.50 (59.1%)	3.83 (69.2%)	3.73 (67.3%)
Discounted or free wash with gas purchase	3.06 (46.6%)	3.06 (48.0%)	3.39 (54.5%)	3.21 (48.4%)	3.29 (53.1%)
Discounted gas with car wash purchase	2.79 (38.4%)	2.54 (30.3%)	3.00 (40.2%)	2.87 (38.1%)	2.82 (38.1%)
Car wash offers extra services	2.84 (38.8%)	2.31 (21.0%)	3.00 (38.2%)	3.64 (61.7%)	3.03 (41.8%)
For special occasions	3.26 (52.7%)	3.07 (46.5%)	3.40 (52.3%)	3.59 (59.9%)	3.36 (53.9%)
On impulse	2.70 (30.8%)	2.40 (23.0%)	2.99 (33.6%)	2.93 (34.8%)	2.81 (30.8%)
Frequent washer discount	2.43 (24.3%)	1.97 (10.2%)	2.72 (28.1%)	3.10 (44.7%)	2.60 (28.6%)
Environmentally safe to wash my car	2.72 (31.5%)	2.22 (16.7%)	2.70 (24.8%)	3.07 (41.1%)	2.36 (19.2%)
Free/discounted oil change	2.24 (21.1%)	2.09 (18.0%)	2.47 (22.5%)	2.20 (19.2%)	2.27 (22.4%)
Appearance of car wash	3.22 (50.3%)	2.56 (27.8%)	3.27 (48.4%)	3.74 (62.9%)	2.96 (37.3%)
Prepaid for multiple car washes at discounted price	2.25 (20.0%)	1.87 (10.8%)	2.51 (23.0%)	2.65 (30.5%)	2.22 (19.3%)
Pay with credit/debit card	2.05 (18.2%)	1.85 (14.2%)	2.43 (24.2%)	2.66 (34.4%)	2.20 (22.6%)
Recognized carwash name/use of brand name products	2.32 (22.4%)	1.85 (10.7%)	2.52 (22.2%)	2.67 (28.4%)	2.02 (12.1%)

Washing Attitudes – continued

- In 2002, the majority of consumers felt that professional car washing was better with regards to being a *faster overall process* and home washing was better in regards of being *safer for the car*, a *better overall value* and *a lower cost*. Consumers differ in that Service-seekers and Soccer Parents believe that car washing is *safer for the environment* and provides *a better overall quality of wash*. Car Enthusiasts, Basic Transports and Indifferent Sloppy Sues tend to disagree. In addition, Service-seekers, Soccer Parents and Indifferent Sloppy Sues believe that professional car washing is more enjoyable and convenient while Car Enthusiasts and Basic Transports do not agree.

	Consumer Market Segments				
This method of washing is:	**Car Enthusiasts**	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Safer for Environment – Home Wash	72.5%	75.7%	55.6%	34.5%	39.5%
Safer for Environment – Car Wash	27.5%	24.3%	44.4%	65.5%	60.5%
Safer for Car – Home Wash	96.6%	94.8%	87.0%	65.7%	68.6%
Safer for Car – Car Wash	3.4%	5.2%	13.0%	34.3%	31.4%
Better Overall Quality of Wash – Home Wash	91.6%	81.0%	65.8%	32.5%	31.8%
Better Overall Quality of Wash – Car Wash	8.4%	19.0%	34.2%	67.5%	68.2%
Better Overall Value – Home Wash	95.0%	94.2%	81.3%	59.0%	63.1%
Better Overall Value – Car Wash	5.0%	5.8%	18.7%	41.0%	36.9%
More Convenient – Home Wash	70.2%	71.1%	47.0%	22.1%	24.8%
More Convenient – Car Wash	29.8%	28.9%	53.0%	77.9%	75.2%
A Lower Cost – Home Wash	95.1%	96.3%	91.1%	84.6%	85.0
A Lower Cost – Car Wash	4.9%	3.7%	8.9%	15.4%	15.0%
More Enjoyable – Home Wash	76.7%	58.7%	42.2%	11.2%	8.5%
More Enjoyable – Car Wash	23.3%	41.3%	57.8%	88.8%	91.5%
Faster Overall Process – Home Wash	33.1%	28.6%	12.9%	2.9%	3.2%
Faster Overall Process – Car Wash	66.9%	71.4%	87.1%	97.1%	96.8%

- It can be determined by the table below that consumers are influenced mainly by *costs*.

	Consumer Market Segments				
Use Car Wash More Often, If…	**Car Enthusiasts**	**Basic Transports**	**Indifferent Sloppy Sues**	**Service-seekers**	**Soccer Parents**
Coupons	53.7%	52.6%	68.1%	75.6%	74.7%
Frequent Washer Club	28.5%	17.2%	34.7%	58.0%	43.0%
VIP treatment	19.3%	6.8%	16.1%	30.0%	13.2%
Lower cost	64.8%	68.4%	78.1%	79.3%	78.9%
Portering option	10.3%	9.2%	14.5%	18.0%	15.3%
If I had more time	12.7%	16.2%	23.0%	15.4%	20.9%
If it took less time	13.0%	13.3%	20.3%	18.1%	16.3%

Consumer Market Segments

Washing Habits

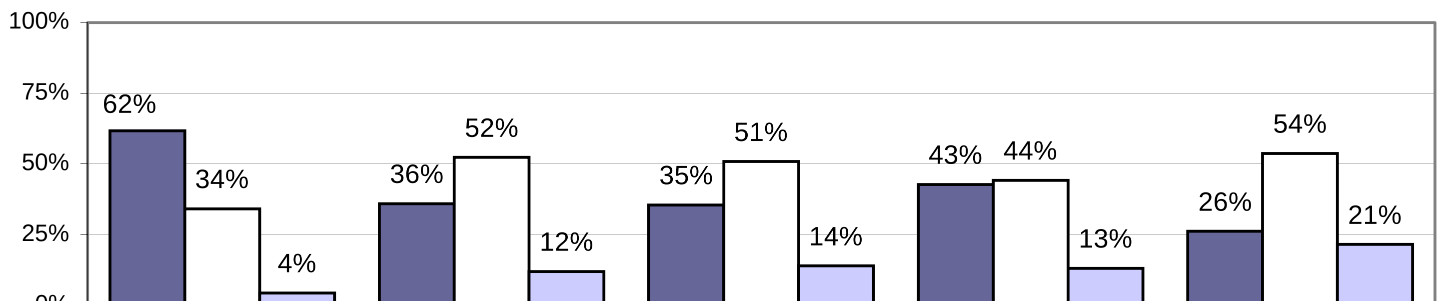
- According to responding consumers, more use *spray wash* at full-service, exterior and stationary automatic car washes than *cloth wash* or *hand wash*.

Consumer Market Segments	Full-service wash				Exterior wash				Stationary automatic wash			
	Spray wash	**Cloth wash**	**Hand wash**	***NR**	**Spray wash**	**Cloth wash**	**Hand wash**	***NR**	**Spray wash**	**Cloth wash**	**Hand wash**	***NR**
Car Enthusiasts	47.6%	29.8%	4.5%	18.1%	62.6%	27.8%	2.6%	7.0%	60.3%	19.5%	-	20.2%
Basic Transports	51.9%	21.9%	7.0%	19.2%	64.0%	28.7%	0.7%	6.6%	55.1%	25.1%	-	19.8%
Indifferent Sloppy Sues	50.5%	30.3%	5.0%	14.2%	63.5%	30.8%	2.2%	3.5%	55.8%	22.8%	-	21.4%
Service-seekers	47.0%	30.2%	10.4%	12.4%	67.7%	26.3%	2.1%	3.9%	60.5%	22.2%	-	17.3%
Soccer Parents	53.5%	28.5%	6.1%	11.9%	73.1%	25.8%	0.6%	0.5%	56.1%	24.9%	-	19.0%

*NR = No Response.
 - = Not Applicable.

- Car Enthusiasts (61.7%) are more likely to *usually clean the interior of the car* than are Soccer Parents (26.0). Surprisingly, Soccer Parents (21.4%) are *more likely to never wash the interior of their car* than are Indifferent Sloppy Sues (13.9%).

How Often Interior is Cleaned



	Car Enthusiasts	Basic Transports	Indifferent Sloppy Sues	Service-seekers	Soccer Parents
Ususally	62%	36%	35%	43%	26%
Sometimes	34%	52%	51%	44%	54%
Not Usually	4%	12%	14%	13%	21%

Washing Habits – continued

- During the previous four weeks, Service-seekers and Soccer Parents washed their vehicles at full-service washes while Car Enthusiasts, Basic Transports and Indifferent Sloppy Sues washed their vehicles at home. Across groups, the majority of respondents indicated that they had their car washed *once or twice* at a professional wash in the past four weeks.

	Type of Car Wash				
Type of car wash used in past past (4) weeks by Consumer Market Segment	**Home Wash**	**Full-service wash**	**Exterior wash**	**Stationary automatic wash**	**Self-service wash**
Car Enthusiasts	60.5%	9.5%	12.1%	14.0%	25.4%
Basic Transports	41.0%	4.3%	6.1%	9.9%	14.8%
Indifferent Sloppy Sues	32.5%	12.7%	15.4%	21.2%	24.2%
Service-seekers	14.2%	43.7%	26.6%	24.8%	10.5%
Soccer Parents	11.2%	22.3%	17.2%	18.6%	6.8%
How often in the past four (4) weeks all respondents have washed their car at…					
Car Enthusiasts					
One time	35.5%	66.3%	61.3%	50.0%	41.0%
Two times	32.5%	22.9%	20.8%	29.5%	28.4%
3 – 4 times	24.8%	9.6%	15.1%	16.4%	22.1%
Five or more times	7.2%	1.2%	2.8%	4.1%	8.6%
Basic Transports					
One time	70.4%	84.0%	77.8%	70.7%	63.2%
Two times	20.0%	12.0%	13.9%	15.5%	25.3%
3 – 4 times	7.5%	**	5.6%	6.9%	10.3%
Five or more times	2.1%	4.0%	2.8%	6.9%	1.1%
Indifferent Sloppy Sues					
One time	50.9%	60.2%	60.7%	55.8%	50.6%
Two times	31.0%	29.5%	28.0%	27.2%	31.0%
3 – 4 times	12.8%	8.0%	10.3%	14.3%	14.9%
Five or more times	5.3%	2.3%	0.9%	2.7%	3.6%
Service-seekers					
One time	59.6%	48.1%	57.4%	48.4%	55.8%
Two times	26.9%	37.2%	25.6%	33.5%	22.1%
3 – 4 times	11.5%	12.5%	13.8%	15.4%	14.3%
Five or more times	1.9%	2.2%	3.1%	2.7%	7.8%
Soccer Parents					
One time	68.8%	77.2%	69.4%	60.4%	74.4%
Two times	26.6%	18.9%	27.6%	25.5%	20.5%
3 – 4 times	1.6%	3.1%	3.1%	13.2%	2.6%
Five or more times	3.1%	0.8%	**	0.9%	2.6%

** = No data was submitted.

Washing Habits – continued

- Over 30 percent of Service-seekers indicated they had their car professionally cleaned 10 or more times in the past year.

How often in the past year have you done the following…	Number of times in the past year – 2002					
	0 times	1-3 times	4-6 times	7-9 times	10-12 times	More than 12 times
Car Enthusiasts						
Had your car professionally washed	58.2%	24.6%	8.2%	2.7%	2.7%	3.7%
Washed your car at home	6.7%	9.2%	16.4%	11.5%	17.3%	38.8%
Had your car detailed	77.1%	18.0%	2.2%	0.6%	0.6%	1.4%
Basic Transports						
Had your car professionally washed	67.6%	21.9%	6.7%	2.3%	0.4%	1.1%
Washed your car at home	8.9%	31.6%	24.3%	16.5%	9.4%	9.4%
Had your car detailed	92.7%	6.0%	0.6%	0.4%	**	0.4%
Indifferent Sloppy Sues						
Had your car professionally washed	51.2%	22.8%	11.1%	6.2%	4.6%	4.0%
Washed your car at home	17.1%	32.9%	22.8%	8.1%	8.9%	10.2%
Had your car detailed	82.9%	14.8%	1.0%	0.5%	0.3%	0.5%
Service-seekers						
Had your car professionally washed	22.2%	18.0%	12.5%	13.8%	15.0%	18.5%
Washed your car at home	43.1%	31.5%	12.8%	4.6%	2.6%	5.3%
Had your car detailed	70.1%	25.7%	3.8%	0.3%	0.2%	**
Soccer Parents						
Had your car professionally washed	31.6%	24.8%	22.2%	11.6%	5.2%	4.5%
Washed your car at home	46.7%	35.1%	10.3%	3.8%	2.9%	1.1%
Had your car detailed	86.5%	12.2%	0.8%	**	0.4%	**

** = No data was submitted.

Washing Habits – continued

- The table below shows how much each consumer market segment spends when they get their car professionally washed.

Type of Car Wash by Cost for Professional Washing	Consumer Market Segments				
	Car Enthusiasts	Basic Transports	Indifferent Sloppy Sues	Service-seekers	Soccer Parents
Full-service wash					
$2.50 or less	1.9%	2.2%	1.6%	0.6%	0.8%
$2.51 to $4.50	7.5%	9.2%	4.2%	1.9%	2.5%
$4.51 to $5.50	6.4%	8.2%	7.4%	4.1%	5.0%
$5.51 to $6.50	12.0%	14.7%	7.4%	7.9%	7.5%
$6.51 to $7.50	8.1%	10.9%	11.6%	7.7%	9.9%
$7.51 to $8.50	9.7%	7.6%	9.3%	8.4%	10.8%
$8.51 to $10.50	14.5%	17.4%	19.0%	22.1%	23.5%
$10.51 to $15.50	21.7%	18.5%	19.6%	29.3%	26.5%
$15.51 to $25.50	14.8%	8.7%	14.5%	15.0%	11.3%
More than $25.50	3.3%	2.7%	5.5%	3.2%	2.2%
Exterior Wash					
$2.50 or less	5.0%	6.8%	2.5%	4.2%	7.2%
$2.51 to $4.50	17.6%	20.4%	16.4%	13.0%	14.4%
$4.51 to $5.50	17.1%	21.2%	18.1%	17.1%	19.2%
$5.51 to $6.50	20.3%	16.0%	19.5%	20.4%	19.2%
$6.51 to $7.50	12.9%	10.4%	14.8%	12.5%	13.8%
$7.51 to $8.50	9.9%	14.0%	10.0%	13.9%	10.5%
$8.51 to $10.50	10.4%	6.0%	9.5%	11.8%	9.0%
$10.51 to $15.50	5.4%	4.4%	8.4%	6.0%	5.4%
$15.51 to $25.50	1.2%	0.8%	0.6%	0.7%	1.2%
More than $25.50	0.2%	**	0.3%	0.5%	0.3%
Stationary automatic wash					
$2.50 or less	12.0%	16.4%	10.6%	7.1%	17.2%
$2.51 to $4.50	26.6%	29.1%	28.7%	30.0%	30.6%
$4.51 to $5.50	27.7%	22.7%	24.1%	25.3%	23.1%
$5.51 to $6.50	17.6%	16.4%	18.4%	17.9%	16.8%
$6.51 to $7.50	10.6%	7.3%	10.3%	10.3%	7.1%
$7.51 to $8.50	3.7%	4.5%	4.1%	5.0%	3.0%
$8.51 to $10.50	1.3%	1.8%	2.7%	3.5%	1.9%
$10.51 to $15.50	**	1.8%	0.5%	0.3%	0.4%
$15.51 to $25.50	**	**	0.3%	0.6%	**
More than $25.50	0.5%	**	0.3%	**	**
Self-service wash					
$2.50 or less	34.2%	38.8%	28.5%	26.0%	36.2%
$2.51 to $4.50	35.5%	39.1%	36.7%	38.7%	34.8%
$4.51 to $5.50	16.1%	13.0%	18.5%	17.8%	15.4%
$5.51 to $6.50	8.4%	5.2%	7.3%	8.2%	8.9%
$6.51 to $7.50	1.8%	1.4%	3.1%	4.5%	2.7%
$7.51 to $8.50	1.5%	1.2%	2.1%	3.0%	1.0%
$8.51 to $10.50	1.6%	0.9%	2.7%	0.9%	*
$10.51 to $15.50	0.5%	**	*	0.6%	0.7%
$15.51 to $25.50	*	**	*	*	**
More than $25.50	*	*	*	**	**

** = No data submitted.
* = Less than 0.5% represented.

International
Carwash Association™
Serving the Professional Car Care Industry

401 N. Michigan Ave.
Chicago, IL 60611
Phone: 888.ICA.8422
Fax: 312.245.1085
www.CarCareCentral.com
ica@sba.com