

Key Findings

DEMOGRAPHIC CHARACTERISTICS

This section outlines key findings of the consumer survey. Please note that data shown for each customer segment is not weighted. The following three charts show the relationship between gender, age, income, region, and wash type used most often.

- ◆ In 2005, more respondents were *female* than *male*. Stationary automatic and exterior customers were least likely to be *male* whereas home washers and self-service customers were more likely to be *male*.

Type of Car Wash Used Most Often – Male versus Female 1999, 2002, 2005

Type of Car Wash	2005		2002		1999	
	Male	Female	Male	Female	Male	Female
Home wash	46.3%	53.7%	42.3%	57.7%	46.2%	53.8%
Full-service wash	42.2%	57.8%	45.3%	54.7%	45.9%	45.1%
Exterior wash	36.7%	63.3%	35.7%	64.3%	44.3%	55.7%
Stationary Automatic wash	38.4%	61.6%	34.1%	65.9%	40.3%	59.7%
Self-service wash	45.3%	54.7%	43.1%	56.9%	46.1%	53.9%

- ◆ More than 30 percent of the self-service most-often customers (36.2%) are *under 40 years of age*, while 63 percent of full-service most often customers are *50 years and older*.

Wash Type Used Most Often

Head of Household Age	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
Under 30 years	7.9%	7.7%	4.5%	6.2%	9.5%	13.8%
30 to 39 years	17.8%	19.2%	12.4%	15.6%	21.9%	22.4%
40 to 49 years	22.9%	25.4%	20.2%	19.6%	22.9%	24.5%
50 to 59 years	21.7%	19.6%	25.5%	21.8%	22.0%	20.1%
60 years or older	29.7%	28.2%	37.4%	36.9%	23.7%	19.2%

- ◆ Full-service most-often customers (41.8%) dominated the *\$75,000 and over* income categories.

Wash Type Used Most Often

Total Annual Household Income	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
Under \$20,000	16.3%	16.3%	10.4%	12.9%	13.5%	24.8%
\$20,000 to \$39,999	24.1%	25.3%	19.8%	21.8%	22.9%	28.8%
\$40,000 to \$59,000	18.6%	18.2%	17.4%	18.6%	20.3%	20.2%
\$60,000 to \$74,999	10.0%	10.4%	10.5%	9.8%	12.2%	7.5%
\$75,000 to \$99,999	15.6%	15.8%	19.3%	18.2%	16.1%	9.6%
\$100,000 to \$149,999	11.6%	10.5%	16.5%	14.1%	11.7%	7.3%
\$150,000 and Over	3.9%	3.5%	6.0%	4.7%	3.3%	1.7%

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 use *stationary automatic* car washes (20.6%) in the West North Central region followed by *the exterior customers* (19.0%) in the East North Central region. In comparison, fewer *exterior* customers reside in the West South Central region (3.7%).

Regions	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
New England	10.2%	11.5%	10.2%	18.7%	4.5%	4.3%
Middle Atlantic	12.2%	11.7%	14.8%	17.8%	7.2%	10.7%
East North Central	11.7%	9.7%	9.2%	19.0%	15.1%	11.3%
West North Central	10.6%	7.3%	6.1%	9.0%	20.6%	18.0%
South Atlantic	11.7%	14.2%	10.9%	6.8%	11.8%	9.7%
East South Central	10.5%	13.3%	7.4%	4.9%	12.4%	9.9%
West South Central	10.7%	10.2%	11.6%	3.7%	10.5%	16.9%
Mountain	10.4%	8.2%	12.4%	9.0%	12.5%	14.1%
Pacific	11.8%	13.8%	17.4%	11.1%	5.4%	5.2%

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

Population Density	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
Non-MSA*	18.3%	19.1%	8.9%	10.8%	24.0%	29.8%
MSA (to ½ mil.)	19.0%	18.0%	15.9%	16.4%	22.0%	23.4%
MSA (½ mil. to 2 mil.)	24.0%	25.1%	22.1%	24.3%	25.0%	21.8%
MSA (over 2 mil.)	38.7%	37.7%	53.2%	48.4%	29.0%	24.9%

*MSA – Metropolitan Statistical Area

- ◆ The majority of home washers and car wash customers drive and wash a *car* most often. However, stationary automatic customers, as well as full-service customers, are more likely to drive a SUV. Self-service customers are more likely to drive a truck than are the other type of car wash customer.

Primary Vehicle Driven and Washed Most Often	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
Car	59.1%	56.0%	63.9%	64.8%	54.9%	55.9%
Van	10.5%	11.3%	8.9%	10.7%	12.7%	9.1%
Truck	12.5%	16.3%	7.2%	6.2%	11.1%	17.2%
SUV	17.8%	16.4%	20.0%	18.3%	21.3%	17.9%

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 - CONTINUED

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

Number of Miles Driven Per Week	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
50 miles or less	24.4%	26.1%	24.9%	24.1%	19.6%	21.3%
51 to 100 miles	32.8%	32.7%	29.5%	32.9%	33.8%	33.8%
101 to 200 miles	23.7%	24.2%	25.3%	21.4%	23.3%	25.7%
201 to 300 miles	11.2%	10.1%	12.6%	13.2%	13.2%	10.1%
301 to 500 miles	5.8%	5.2%	6.2%	6.3%	7.1%	6.6%
More than 500 miles	2.0%	1.7%	1.5%	2.1%	3.0%	2.5%

- ◆ More respondents live in *households of two*. Home washers are more likely to live in households of four or more and self-service customers are more likely to live in households of three.

Household Size	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
One	26.0%	22.1%	29.3%	31.1%	24.0%	25.4%
Two	38.3%	37.9%	42.5%	37.8%	40.3%	32.5%
Three	15.4%	16.3%	11.6%	13.3%	15.9%	19.3%
Four	12.4%	14.7%	10.0%	11.4%	11.5%	13.8%
Five or more	8.0%	9.0%	6.7%	6.4%	8.2%	8.9%

- ◆ Overall, more respondents (59.2%) are *married* than *widowed, divorced, separated* or *single*.

Marital Status	Wash Type Used Most Often					
	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
Married	59.2%	63.1%	58.1%	56.8%	61.9%	54.6%
Widowed	8.2%	7.2%	10.1%	10.5%	6.8%	5.7%
Divorced	15.3%	14.2%	15.6%	15.9%	13.4%	17.5%
Separated	1.4%	1.2%	1.1%	1.2%	0.7%	2.2%
Never Married	15.9%	14.2%	15.2%	15.6%	17.2%	20.0%

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

Key Findings

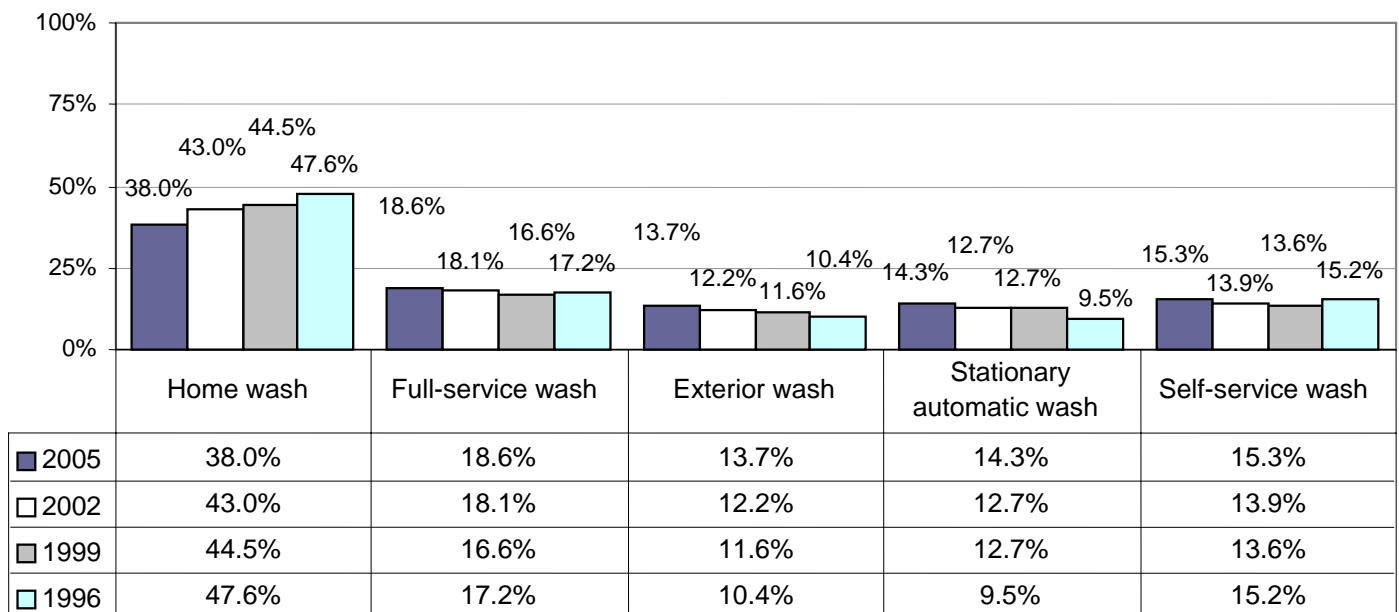
TYPE OF WASHING

- The table below shows that home washing is down by 12 percent from 2002; by 15 percent from 1999; by 20 percent from 1996. Interestingly, stationary automatic washing increased to 13 percent from 2002. From 2002, in comparison, full-service washing increased by 3 percent; self-service washing increased by 10 percent; and exterior washing increased by 12 percent.

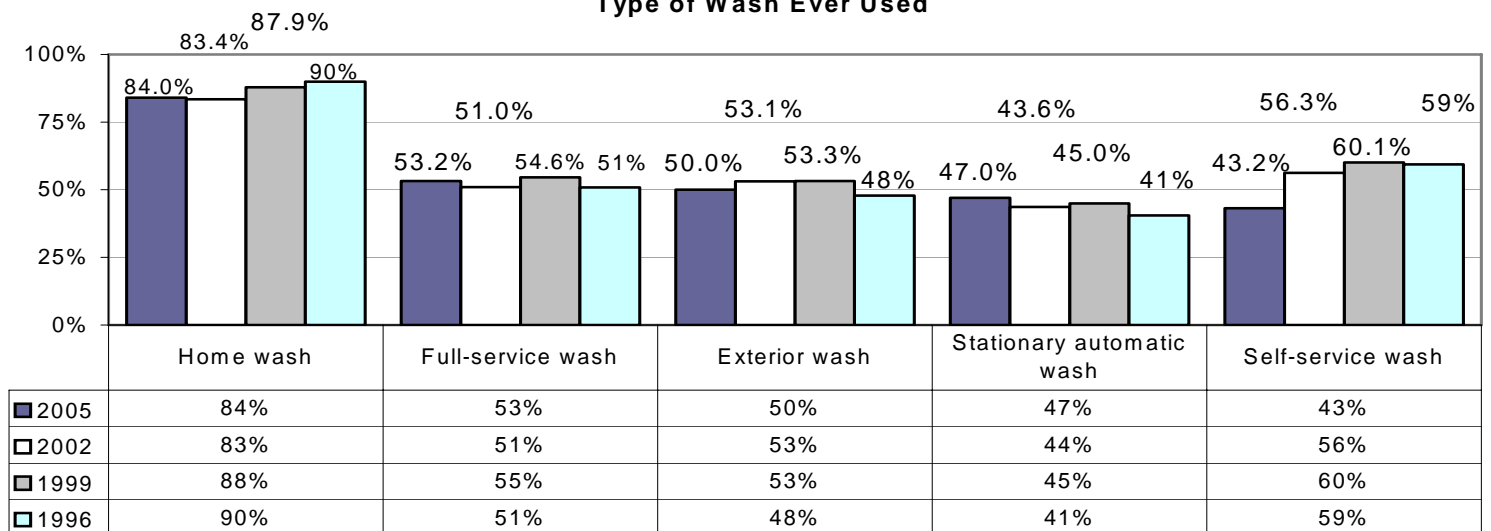
Note: The formula for calculating the “percent change” is to divide the current year (noted) by the previous year (noted), then to multiply this figure by 100 and then to subtract the final figure by 100.

- When asked to indicate which specific types of washes they have ever used, respondents reported that home wash (84.0%) was the type of car wash most everyone has ever used.

Type of Wash Used Most Often



Type of Wash Ever Used



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.”

- ◆ Across all types of car washes ever used, home washers and customers rated their satisfaction with the *quality of the wash* higher than the importance of it. Interestingly, stationary automatic customers gave higher end-product delivery ratings than importance ratings for all categories surveyed, except for *quality of wash*, *safety of car’s exterior* and *importance of value*.

Exterior wash customers rated their satisfaction with *less work* higher than the importance of it, while home washers rated the satisfaction of *less work* significantly lower than the importance of it. For self-service customers, there was very little difference between what they define as important and what they receive in regards to the *less work* of cleaning their vehicles. Stationary automatic 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.

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	89.1%	96.7%	91.5%	90.8%	88.2%
Satisfaction with quality of the wash	92.8%	93.7%	83.8%	76.4%	83.1%
Importance of less work	40.2%	67.0%	66.6%	65.3%	43.2%
Satisfaction with less work	28.3%	91.8%	92.0%	91.6%	42.0%
Importance of faster overall	40.8%	64.0%	67.2%	62.6%	46.6%
Satisfaction with faster overall	38.6%	86.9%	92.7%	90.7%	55.6%
Importance of conveniently located	67.3%	82.0%	79.8%	78.8%	78.8%
Satisfaction with conveniently located	93.1%	81.1%	84.6%	86.4%	81.3%
Importance of ease of use	69.0%	84.1%	83.6%	83.4%	82.9%
Satisfaction with ease of use	80.0%	92.8%	92.3%	93.8%	78.7%
Importance of environmentally safe	51.8%	56.7%	54.5%	50.4%	51.7%
Satisfaction with environmentally safe	73.4%	64.9%	62.1%	57.8%	58.1%
Importance of safety of car’s exterior	85.9%	89.6%	89.1%	89.0%	84.6%
Satisfaction with safety of car’s exterior	92.4%	84.0%	72.2%	74.7%	80.8%
Importance of value (quality of wash for money spent)	83.5%	91.2%	87.9%	88.6%	86.9%
Satisfaction with of value (quality of wash for money spent)	93.8%	78.6%	77.2%	76.8%	77.2%

*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 in order of importance a list of 12 additional services that could be offered at the same location as a car wash. Overall, a gas station was ranked first as the additional services that could be added, followed by an express detailing and oil change/quick lube.

Type of Car Wash Used Most Often - 2005

Key Findings

Additional Services (In Rated #1 Service, Percent Rank Order Based on Overall)	Overall	Home washers	Full-service customers	Exterior customers	Stationary automatic customers	Self-service customers
Gas station	1.62	1.62	1.71	1.57	1.51	1.68
Express detailing	1.82	1.91	1.78	1.70	1.86	1.84
Oil change/Quick lube	1.92	1.89	1.85	1.92	2.02	1.99
ATM	1.97	1.93	1.97	2.12	2.13	1.89
Convenience store	2.01	2.07	1.95	2.04	2.02	1.95
Other	2.05	2.17	1.81	2.07	2.40	1.72
Paintless dent-repair	2.13	2.13	2.13	2.22	2.10	2.09
Dry cleaner	2.14	2.29	2.00	2.15	2.00	2.29
Brakes	2.19	2.05	2.29	2.36	2.41	2.06
Windshield repair	2.24	2.23	2.18	2.31	2.28	2.38
Water dispenser	2.25	2.38	2.07	2.16	2.39	2.10
Quick-service restaurant	2.32	2.27	2.20	2.38	2.44	2.43
Tune up	2.38	2.35	2.46	2.43	2.40	2.31
Propane gas	2.42	2.38	2.23	2.50	2.41	2.80
Gift shop	2.45	2.40	2.42	2.31	2.55	2.59
Truck rental	2.77	2.88	2.25	3.00	3.00	3.00

Rating scale: "1" = first choice, "2" = second choice and "3" = third choice of additional services.

** = No data was submitted.

- ◆ As seen in Appendix A, (i.e., Demographic Characteristics) *spot-free rinse* and *wheel/hubcap cleaning* were identified by respondents as the top-two most important factors they consider when selecting the type of car wash to use. Not surprising, full-service customers ranked *interior vacuuming* the highest (81.1%) followed by *hand towel drying* (69.9%).

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	59.0%	47.6%	66.1%	61.0%	72.9%	67.5%
Wheel/hubcap cleaning	48.6%	46.5%	65.4%	49.6%	39.2%	42.7%
Interior vacuuming	48.1%	44.8%	81.1%	30.8%	24.9%	51.9%
Under body wash	41.8%	33.9%	46.2%	52.3%	60.8%	32.8%
Hand towel drying	36.5%	35.0%	69.9%	35.4%	11.5%	24.0%
Wax/paint protectant coating	36.0%	27.8%	42.6%	38.5%	44.6%	39.0%
Hand wax/protectant application	14.0%	14.5%	18.1%	9.3%	8.8%	14.8%
Triple color protectant (foam) conditioner	11.3%	7.4%	15.5%	11.6%	16.2%	10.7%
Carpet shampooing	7.6%	7.1%	13.0%	3.4%	4.1%	7.3%

** = No data was submitted.

Key Findings

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.

- ◆ Thoroughly cleaned *wheels* were most important to full-service customers, but least important to stationary automatic 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)	4.16 (77.0%)	4.30 (82.5%)	4.07 (75.3%)	3.90 (67.6%)	4.04 (72.5%)
Delivery – Mean (Top-two box net)	4.23 (79.8%)	4.20 (83.3%)	3.75 (64.9%)	3.59 (55.5%)	3.88 (69.2%)

- ◆ Thoroughly cleaned *windows* were rated most important to full-service customers. However, home washers are most satisfied with how thoroughly they clean their *windows*.

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)	4.73 (95.6%)	4.83 (97.9%)	4.72 (96.0%)	4.67 (94.4%)	4.68 (94.6%)
Delivery – Mean (Top-two box net)	4.53 (89.2%)	4.49 (92.8%)	4.24 (81.9%)	4.19 (80.7%)	4.29 (83.4%)

- ◆ A thoroughly cleaned car body was important to all customers, but all rated the delivery of this service lower.

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)	4.74 (96.8%)	4.84 (98.7%)	4.77 (98.5%)	4.75 (97.4%)	4.72 (96.1%)
Delivery – Mean (Top-two box net)	4.52 (90.2%)	4.46 (91.6%)	4.22 (84.0%)	4.12 (80.2%)	4.28 (84.4%)

Rating scale: 5 = "Very Important" and 1 = "Not very/Not at all Important" for Importance. 5 = "Excellent" and 1 = "Poor" for Delivery.

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

Key Findings

WASHING ATTITUDES – CONTINUED

- ◆ A thoroughly cleaned *windshield* is least important to stationary automatic 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 –	4.78	4.88	4.76	4.70	4.72
Mean (Top-two box net)	(96.1%)	(98.1%)	(96.0%)	(94.7%)	(95.2%)
Delivery –	4.56	4.52	4.34	4.23	4.34
Mean (Top-two box net)	(90.0%)	(93.0%)	(85.8%)	(82.3%)	(85.7%)

- ◆ The lowest rating for importance AND delivery of *thoroughly cleaned mats/carpets* was indicated by 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 –	3.73	4.11	3.24	3.11	3.46
Mean (Top-two box net)	(61.6%)	(78.7%)	(45.3%)	(38.1%)	(50.9%)
Delivery –	3.88	3.91	2.44	2.09	3.12
Mean (Top-two box net)	(66.3%)	(70.5%)	(24.3%)	(16.1%)	(39.0%)

- ◆ 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 –	3.75	4.16	3.28	3.16	3.49
Mean (Top-two box net)	(62.1%)	(80.8%)	(46.7%)	(40.7%)	(53.1%)
Delivery –	3.97	3.94	2.51	2.08	3.06
Mean (Top-two box net)	(69.3%)	(71.5%)	(26.7%)	(16.7%)	(39.8%)

- ◆ 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 rating and stationary automatic washes received the lowest delivery ratings.

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 –	3.83	4.32	3.80	3.54	3.46
Mean (Top-two box net)	(65.1%)	(83.6%)	(65.7%)	(55.9%)	(51.6%)
Delivery –	3.90	4.12	3.34	2.99	3.00
Mean (Top-two box net)	(67.8%)	(77.7%)	(50.0%)	(35.8%)	(40.0%)

Rating scale: 5 = "Very Important" and 1 = "Not very/Not at all Important" for Importance. 5 = "Excellent" and 1 = "Poor" for Delivery.

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

Key Findings

WASHING ATTITUDES – CONTINUED

- ◆ The tables below show the type of car wash used most often and the factors influencing the use of a car wash.

Factors Influencing Use of Car Wash (In Mean Rank Order Based on Overall)	Wash Type Used Most Often - 2005					
	Overall	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Special prices/discount coupons	3.55	3.35	3.88	3.92	3.58	3.32
For special occasions	3.39	3.18	3.47	3.60	3.56	3.51
Appearance of car wash	3.31	3.06	3.59	3.44	3.44	3.38
Discounted or free wash with gas purchase	3.25	3.22	3.05	3.24	3.66	3.24
Car wash offers extra services	3.07	2.81	3.78	3.05	2.99	2.92
Discounted gas with car wash purchase	2.96	2.94	2.88	2.89	3.12	2.99
On impulse	2.89	2.63	2.92	3.07	3.17	3.12
Environmentally safe to wash car	2.80	2.65	3.07	2.90	2.76	2.79
Frequent washer discount	2.73	2.47	3.18	2.94	2.75	2.65
Pay with credit/debit card	2.57	2.36	3.03	2.51	2.84	2.28
Recommendation of a friend	2.57	2.48	2.75	2.61	2.53	2.51
Prepaid for multiple car washes at discounted price	2.47	2.31	2.70	2.60	2.51	2.40
Free/discounted oil change	2.43	2.46	2.41	2.34	2.41	2.48
Advertisements	2.33	2.20	2.68	2.42	2.23	2.20
Self-pay kiosk	2.31	2.19	2.03	2.03	2.84	2.70
Recognized carwash name/use of brand name products	2.28	2.17	2.46	2.24	2.33	2.28

Rating scale: 1 to 5 where 5 = "A great deal of influence" and a 1 = "Little or no influence."

- = Not Applicable.

Factors Influencing Use of Car Wash	Wash Type Used Most Often 2005 and 2002 Gap Analysis		
	2005 Overall	2002 Overall	Gap Analysis
Recommendation of a friend	2.57	2.71	-0.14
Advertisements	2.33	2.54	-0.21
Special prices/discount coupons	3.55	3.63	-0.08
Discounted or free wash with a gas purchase	3.25	3.39	-0.14
Discounted gas with car wash purchase	2.96	3.17	-0.21
Car wash offers extra services	3.07	3.25	-0.18
For special occasions	3.39	3.54	-0.15
On impulse	2.89	3.07	-0.18
Frequent washer discount	2.73	2.87	-0.14
Environmentally safe to wash car	2.80	2.92	-0.12
Free/discounted oil change	2.43	2.60	-0.17
Appearance of car wash	3.31	3.38	-0.07
Prepaid for multiple car washes at discounted price	2.47	2.63	-0.16
Pay with credit/debit card	2.57	2.54	+0.03
Self-pay kiosk	2.31	-	-
Recognized carwash name/use of brand name products	2.28	2.58	-0.30

Rating scale: 1 to 5 where 5 = "A great deal of influence" and a 1 = "Little or no influence."

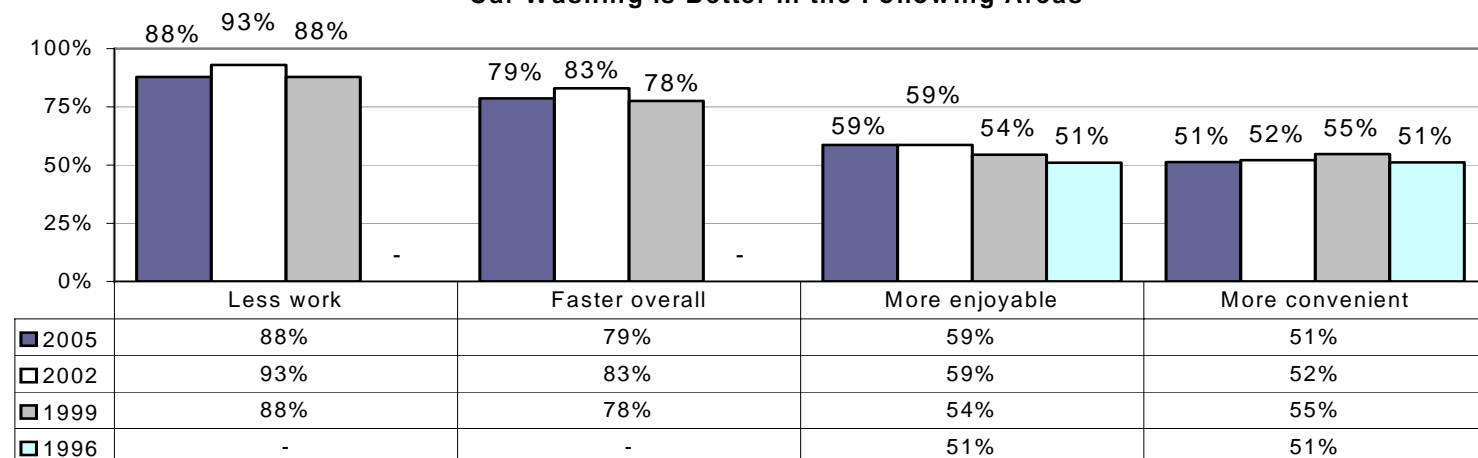
- = Not Applicable.

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 requires *less work*, it's *faster overall*, *more enjoyable* and *more convenient*.

Car Washing is Better in the Following Areas



- ◆ 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*.

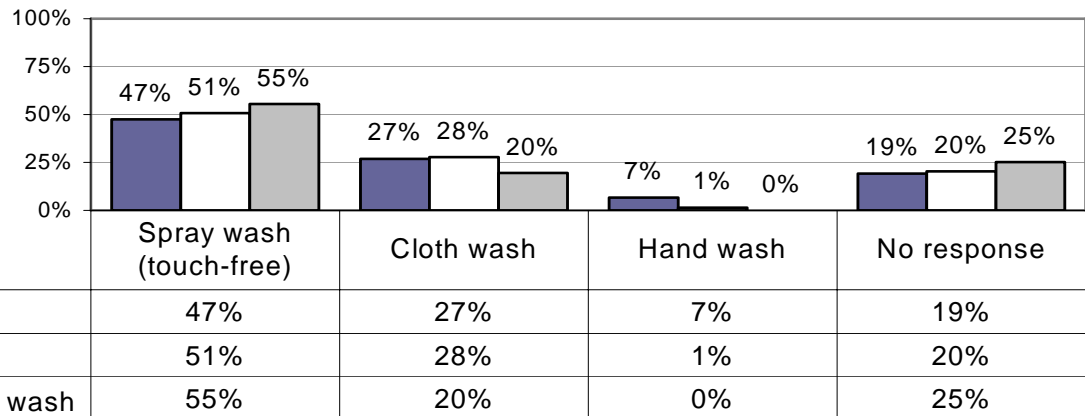
Features by car wash type...	Overall	Home wash	Full-service wash	Exterior wash	Stationary automatic wash	Self-service wash
Lower cost	74.9%	70.7%	76.3%	80.1%	79.3%	78.8%
Coupons	62.8%	53.4%	74.7%	73.9%	69.9%	59.5%
Frequent washer club	34.1%	20.6%	47.7%	45.8%	44.9%	33.8%
VIP treatment	17.8%	13.7%	27.7%	19.6%	18.9%	12.6%
If I had more time	25.0%	24.9%	21.7%	21.0%	23.6%	34.9%
If it took less time	17.5%	16.0%	17.4%	14.1%	8.9%	21.7%
Able to self-pay at an automated kiosk/station	10.9%	8.8%	5.8%	8.7%	19.2%	17.0%

Key Findings

WASHING HABITS

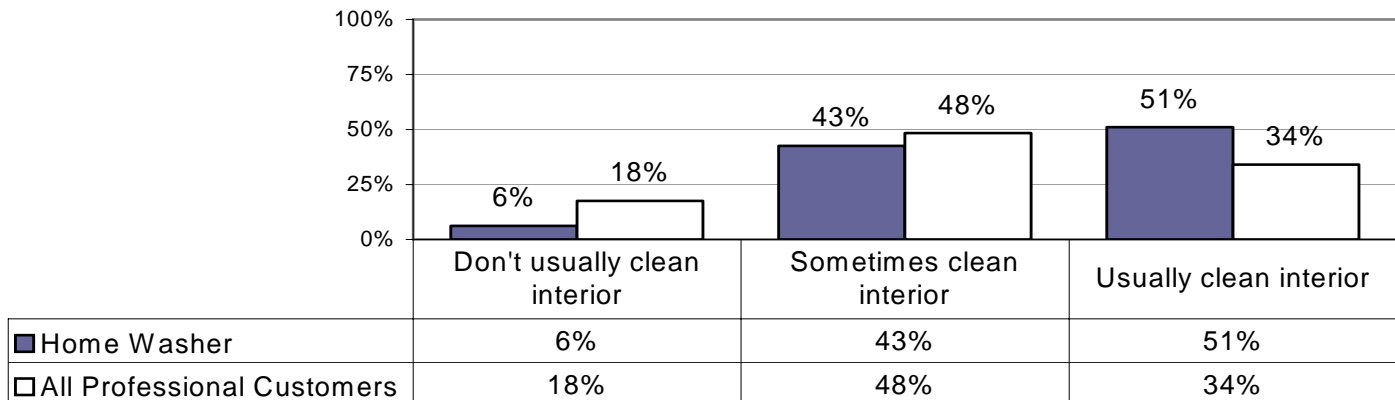
- Responding full-service, exterior and stationary automatic customers were also asked what type of wash they use: spray, cloth or hand. The majority of all wash type customers (i.e., full-service, exterior and stationary automatic) indicated they use *high-pressure spray wash*.

Preferred Type of Wash



- When washing the exterior of their vehicle, about half of home washers (51.1%) *usually clean the interior* while less than half (42.6%) sometimes clean the interior. Interestingly, less than half of all professional wash types usually (34.1%) or sometimes (48.4%) have the interior of their vehicle cleaned when they have the exterior washed.

Cleaning the Vehicle's Interior



Key Findings

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.

Behavior Pattern	Incentive Features						
	Coupons	Frequent Washer Club	VIP Treatment	Lower Cost	Able to self-pay at automated kiosk	If I had More Time	If it Took Less Time
Taken vehicle to a professional wash							
0 times/Have not done	40.5%	34.9%	36.0%	45.6%	55.3%	51.2%	50.4%
1-3 times	27.9%	26.2%	25.1%	26.4%	25.3%	26.1%	24.4%
4-6 times	13.0%	13.7%	13.0%	12.0%	9.0%	11.5%	12.0%
7-9 times	7.9%	10.1%	8.6%	6.8%	4.9%	4.8%	4.7%
10-12 times	5.4%	7.4%	7.0%	4.7%	3.8%	3.7%	4.2%
More than 12 times	5.2%	7.8%	10.3%	4.5%	1.6%	2.7%	4.3%
Washed car at home							
0 times/ Have not done	27.4%	30.8%	31.3%	25.8%	26.2%	27.6%	26.6%
1-3 times	28.8%	29.4%	25.3%	29.4%	34.9%	31.7%	29.4%
4-6 times	16.8%	16.5%	14.8%	16.6%	13.6%	15.1%	14.1%
7-9 times	9.4%	7.8%	8.7%	9.8%	8.6%	10.0%	9.5%
10-12 times	7.0%	5.5%	7.7%	7.4%	5.9%	5.8%	7.1%
More than 12 times	10.7%	9.9%	12.1%	11.0%	10.8%	9.9%	13.3%
Had car detailed							
0 times/Have not done	79.2%	74.6%	68.4%	80.7%	78.0%	80.7%	80.0%
1-3 times	17.8%	22.2%	26.5%	16.5%	18.9%	15.4%	16.7%
4-6 times	1.8%	1.9%	2.8%	1.6%	1.8%	2.4%	2.1%
7-9 times	0.6%	0.7%	1.3%	0.5%	0.7%	0.5%	0.5%
10-12 times	*	*	*	*	*	0.5%	*
More than 12 times	*	*	0.7%	*	*	0.5%	*
Had car lubed							
0 times/Have not done	24.4%	20.0%	19.4%	24.3%	25.9%	26.3%	23.2%
1-3 times	43.5%	43.5%	43.9%	44.0%	43.2%	43.9%	41.7%
4-6 times	26.0%	30.0%	29.7%	25.6%	25.2%	23.6%	28.1%
7-9 times	3.9%	4.4%	3.8%	3.8%	3.4%	4.0%	4.9%
10-12 times	1.4%	1.3%	1.9%	1.5%	1.3%	1.3%	1.5%
More than 12 times	0.9%	0.7%	1.4%	0.9%	0.9%	1.0%	0.6%

* = Less than 0.5% represented.