



**INTERNATIONAL CARWASH ASSOCIATION®**  
GROWING. SMARTER. TOGETHER.

# 2014 Consumer Study

## Price Gets Their Attention, but Relationships Build Your Business: The ICA 2014 Consumer Study

For the seventh time since 1996, the ICA has conducted a large-scale study of American carwash customers. And the results point to a clear business opportunity: the more committed a customer is to using a PRO carwash, the less actual price matters and the more intangibles do matter. Intangibles like:

- The pride and satisfaction of a clean car
- The benefit of maintaining a car's value
- The real value of premium services
- The relationship with a trusted provider
- The environmental benefits of a PRO wash

Yes, price does matter. It's a key barrier to DIY users, and it can catch the eye of PRO users and drive traffic. But again and again, the numbers show that real incremental growth can come from deepening the relationship with current customers by leveraging emotions and logic, not just dollars-and-cents transactions.

At the ICA's E3: Wash Different workshop in Chicago in September 2014, the study's architect, Bob Klein, Chief Strategy Officer of Blue Chip Marketing stressed that carwashes should think of themselves as "brands, not locations."

He advocated concentrating on current customers, educating them on the significant emotional and practical advantages of upsell services and focusing hard on the their experience at the carwash.

He also encouraged much more use of email and social media marketing as highly targeted ways to encourage incremental visits, educate customers on benefits and deepen the relationship – evolving it from purely transactional to something more profitable for both the customer and your business.

We've spelled out the results of the 2014 survey here. But additional information is always available at our online home, [Carwash.org](http://Carwash.org).





# 71.6%

OF CONSUMERS USED A PROFESSIONAL CARWASH IN 2014 (UP FROM 68.2% IN 2011)



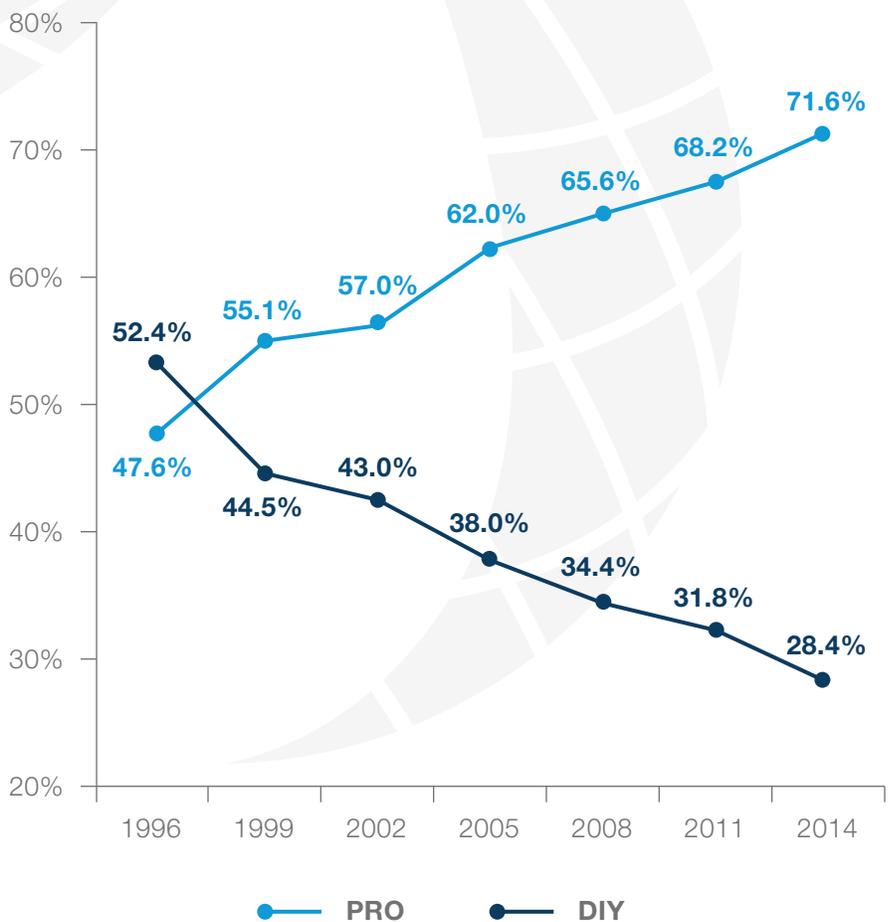
# 28.4%

OF CONSUMERS WASHED VEHICLES AT HOME IN 2014 (DOWN FROM 31.8% IN 2011)

## The Good News

Use of a professional car wash versus washing at home continues to grow. The International Carwash Association has been measuring where vehicles are washed most frequently since 1996, and the use of professional car washes continues to grow each year. In the 2014 study, professional car washing was used most frequently among 71.6% of consumers (up from 68.2% in 2011).

### WHERE VEHICLES WASHED MOST OFTEN IN PAST YEARS





# 67%

**REPORTED PRICE BEING  
TOP FACTOR DRIVING THE  
INCREASE IN PRO USE**



# 72%

**REPORTED MAINTAINING  
VEHICLE VALUE IS PRIME  
MOTIVATOR OF PRO USE**

## The Deeper Dive: More Ways To Drive Revenue

### **INCIDENCE: What's driving the increase in PRO use?**

Price (67%), value (72%) and discounts/coupons (64%) clearly grow PRO use, so hammer home these messages.

- But looks great (69%), a car-safe facility (58%), short lines (57%), 5-day re-wash (53%) and friendly/professional employees (50%) all factor in.

**Loyalty: PRO customers are location-loyal, so work to make them more frequent, and give others reason to become loyal. Follow the Firestone model: with less loyalty to car brands and more used cars on the road, Firestone wants to be “your car company” for service. Be “their company” for cleaning.**

- I always use the same PRO location (43%); two PRO locations (36%)

### **VALUE: Why do PRO users prefer PRO?**

**Maintaining vehicle value is one prime motivator of PRO use (72%). Discounts/savings and fun/enjoyment are not. Most of the main benefits of PRO use are emotional – leverage those, appeal to the heart!**

- Makes me feel good (75%), special occasions (73%), reflects well on me (69%), makes me feel proud (67%)

**Cleanliness of car (87%) and price (80%) are more important than convenience (65%) and speed (57%) to PRO users.**

**Having the interior vacuumed or wax/paint protectant applied rank high in importance (43% each) AND being worth extra cost (44% and 46% respectively). Detailing is considered less important (27%) but 44% see it as worth extra cost.**

- Underbelly treatment, wheels, tires and hand-towelings all rank lower in commanding more cost.





ALMOST

1/2

FEEL A CARWASH IS EITHER DISCRETIONARY OR NOT IMPORTANT – A GREAT OPPORTUNITY FOR EDUCATION ON VALUE OF CARWASH



USERS ARE MORE LIKELY TO FEEL A PRO CARWASH IS MORE ENVIRONMENTALLY FRIENDLY

## The Deeper Dive: More Ways To Drive Revenue (continued)

### BARRIERS: What to avoid, what to promote

Almost half feel a carwash is either discretionary or not important – a great opportunity for education on the value of a carwash.

- Washing a vehicle is: important and necessary (53%), discretionary but desirable (26%), not important without extra time or money (21%)

Despite conventional wisdom, the biggest upsell opportunity could be medium PRO users. Why? The average car is now 11.4 years old compared to 8.4 years in 1996, and medium PRO users skew toward older cars. If every medium and light PRO user (72% overall) got a carwash once more each six months, your revenue would increase 14%. Help medium PRO users in their commitment to keep their cars!

- Medium PRO users are 47% of the universe, but account for only 29% of washes
- Heavy PRO users are 28% of all PRO users but account for 66% of all washes.
- 54% of medium PRO users drive a car 6+ years old; only 39% of heavy PRO users do.

### DIFFERENTIATION: How to get noticed and get ahead

The environment: DIY users are more likely to feel that a PRO carwash is more environmentally friendly: tout this to reach them. And PRO users would come more often if water were recycled and detergents were safe: have you joined our WaterSavers Program?

- All users: Washing a car at a carwash is safer for the environment than at home (40%)
- PRO users: Washing a car at a carwash is safer for the environment than at home (26%)
- PRO users: Would come more often if environmentally friendly (35%)





**48%**

RECEIVED AN  
ONLINE COMMUNICATION  
VIA EMAIL



**25%**

RECEIVED AN  
ONLINE COMMUNICATION  
VIA FACEBOOK

## The Deeper Dive: More Ways To Drive Revenue (continued)

**The media: You may be missing an opportunity to leverage email and Facebook. Your email list is pre-qualified, and Facebook can hyper-target.**

- I received an online communication from a carwash in the past year (7%)
- If I received an online communication, it was via email (48%) or Facebook (25%)
- If I used an online communication, it was via email (44%) or Facebook (18%)
- PRO owner quotes from the conference:
  - › “‘Breaking Bad’ was about a carwash. We target ‘Breaking Bad’ Facebook fans. We only paid for ads we served to those people. We didn’t pay for anything that wasn’t targeted.”
  - › “We target anyone who likes any local carwash page on Facebook, not just ours. It’s a steal opportunity.”

