

2017 European Car Wash Report: France, Germany, Italy, **Netherlands**, Poland & Sweden

8.2.17



Background & Objectives

Since 1996, the International Carwash Association® (ICA) has conducted large-scale quantitative consumer research to unearth business-building insights for both current and prospective members. The 2017 European Car Wash Study is the first ICA consumer study for Europe. It explores the following areas:

- **Incidence** – What is the mix of home vs. professional car washing?
- **Value** – What do consumers most value in car wash services?
- **Barriers** – Why do consumers not wash (or wash more often) at a professional car wash?
- **Differentiation** – What factors influence consumer preference for one professional car wash over another?
- **Issues & Opportunities** – How might differences between countries help to unearth new opportunities for growth?

Study Design

Blue Chip Marketing Worldwide conducted a national online study in six European countries including France, Germany, Italy, Netherlands, Poland, and Sweden from May 1-4, 2017.

1,806 adults were surveyed. In order to qualify for the study, respondents had to own, lease, or have a company-provided vehicle.



Online study
May 1-4, 2017



1,806 adults surveyed



Had to own, lease, or
have a company-provided
vehicle

Executive Summary

**6 Country Total Analysis:
France, Germany, Italy,
Netherlands, Poland & Sweden**

Executive Summary: 6 Country Total

Incidence

What is the mix of home vs. professional car washing?

85% washed at a professional car wash at least once in the past year.
The majority of those who washed at a professional car wash, ONLY washed at professional car wash.
16% washed both at home and at a car wash.
10% only washed at home.

Value

What do consumers most value in car wash services?

- Unsurprisingly, cleanliness of the vehicle is most important when choosing a car wash.
- Wax/paint protectant is the most important additional car wash service to the six European countries surveyed.

Barriers

Why do consumers not wash (or wash more often) at a professional car wash?

Cost is the biggest reason for washing a vehicle at home instead of using a car wash (76%). However, DIY washers also wash at home, because they like doing it themselves (62%) and they enjoy washing their vehicle when the weather is nice (64%).

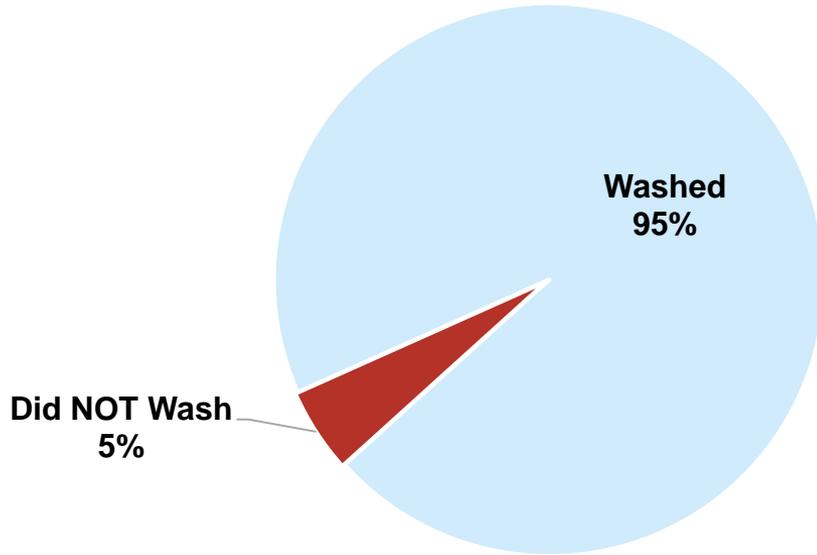
Differentiation

What factors influence consumer preference for one professional car wash over another?

- Overwhelmingly, convenience is the most important reason to choose a particular car wash over another among the six European countries surveyed (44%).

**95% of respondents washed their vehicle at least once in the past year.
5% did not wash their vehicle at all.**

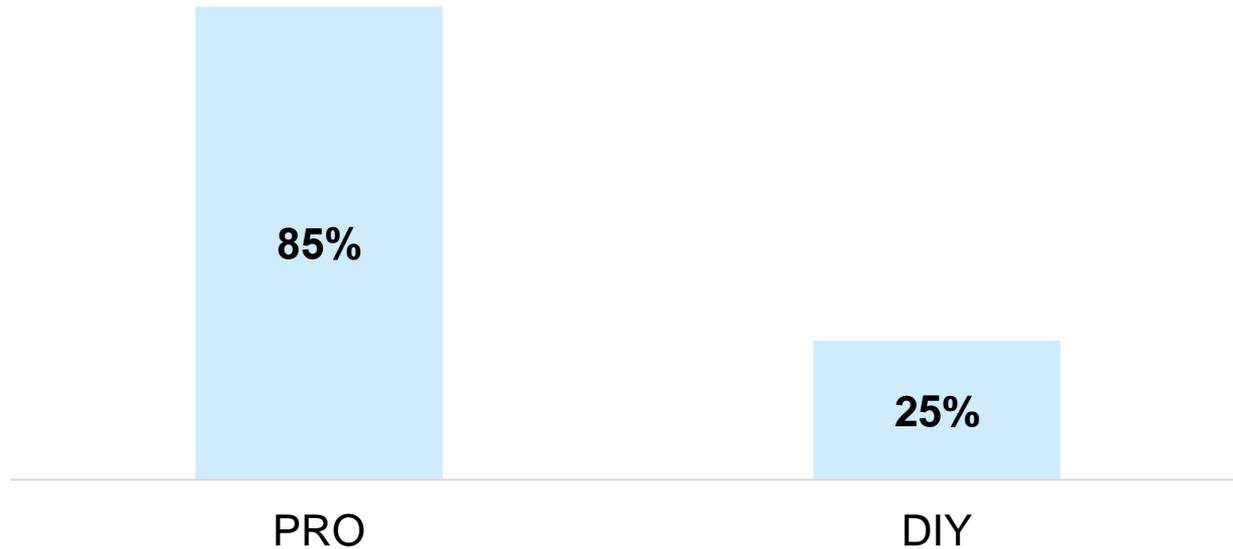
Washed Vehicle in Past Year



Have you washed your vehicle in the past year? N=1806

85% of all respondents washed their vehicle at a PRO wash at least once in the past year. 25% washed at home (DIY in chart) at least once in the past year.

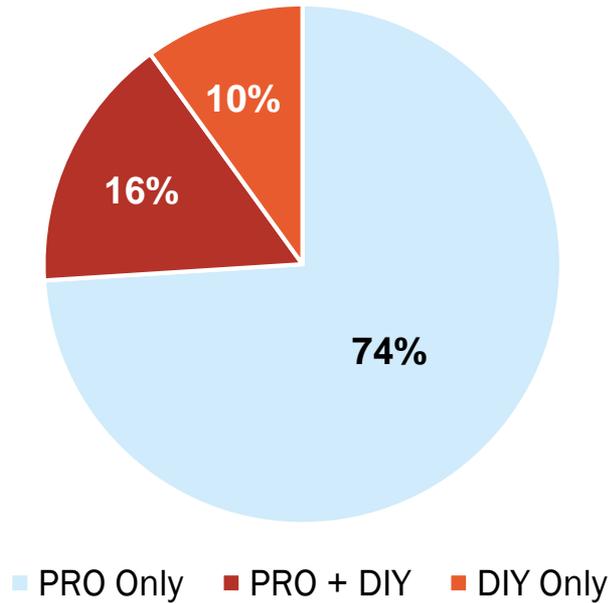
Where Washed Vehicle in Past Year



Which of the following have you done in the past year to wash your vehicle? N=1,806

Among all consumers who washed their vehicle, 74% washed exclusively at a PRO wash. 16% washed at both a PRO wash and at home. 10% washed only at home.

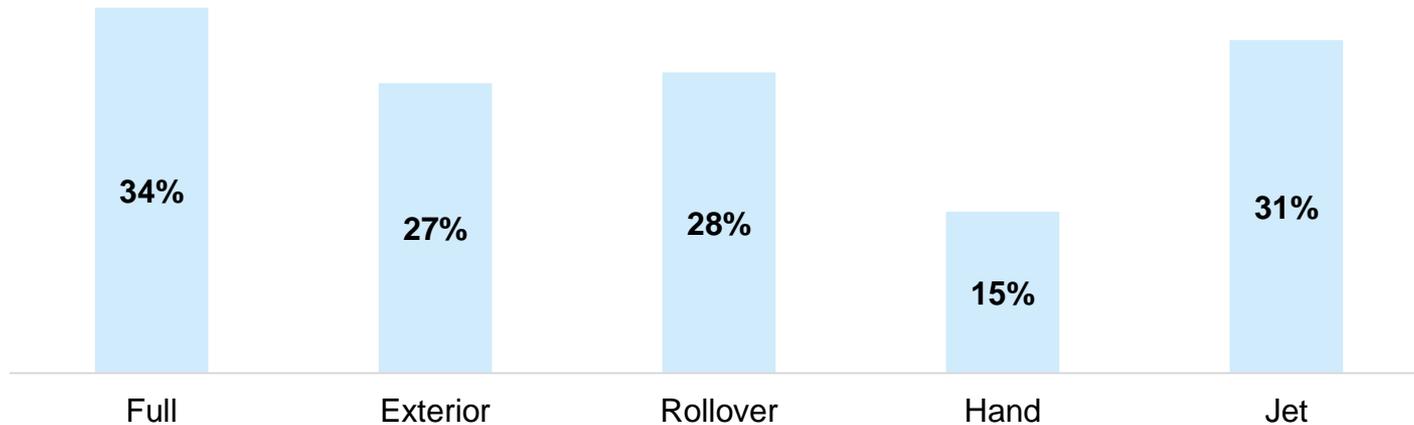
Where Washed Vehicle in Last Year



Which of the following have you done in the past year to wash your vehicle? N=1,709

Full-service is the most common type of PRO wash used followed by jet washes. Hand is the least common type of PRO wash used.

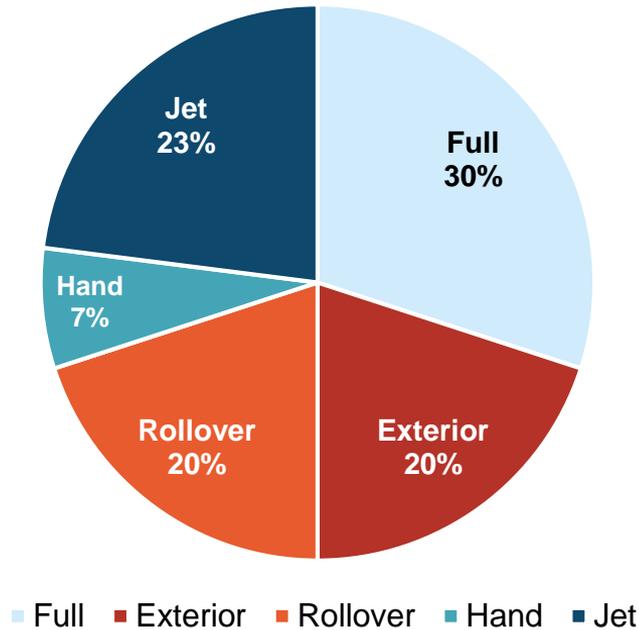
PRO: Where Washed Vehicle In Past Year



Which of the following have you done in the past year to wash your vehicle? N=1709

30% of PRO washers washed their vehicle at a full-service location most often.
Only 7% washed at a hand wash most often.

PRO: Where Wash Most Often



Which ONE of the following do you do most often to wash your vehicle? N=1,462

Country-Specific Analysis: Overview

By country, washing your vehicle is universal with Poland reporting the highest percentage of those who have washed their vehicle in the past year.

	6 Country Total A	France B	Germany C	Italy D	Netherlands E	Poland F	Sweden G
Total	N=1806	N=301	N=300	N=301	N=303	N=301	N=300
Yes	95% e	92%	96% BEg	96% BEg	92%	98% ABEG	93%
No	5% F	8% CDF	4%	4%	8% aCDF	2%	7% cdF

Germany has the highest percentage of those who only wash at a PRO wash while the Netherlands has the lowest percentage of PRO only washers.

	6 Country Total A	France B	Germany C	Italy D	Netherlands E	Poland F	Sweden G
Total	N=1806	N=301	N=300	N=301	N=303	N=301	N=300
PRO Only	70% E	68% E	83% ABDEFG	76% AE	58%	67% E	68% E

Due to rounding, not all columns add up to 100%.

Poland has the highest percentage of those who switch between using a PRO wash and washing at home.

	6 Country Total A	France B	Germany C	Italy D	Netherlands E	Poland F	Sweden G
Total	N=1806	N=301	N=300	N=301	N=303	N=301	N=300
PRO Only	70% E	68% E	83% ABDEFG	76% AE	58%	67% E	68% E
PRO + DIY	15% C	14% c	9%	16% C	13%	26% ABCDEG	14%

Due to rounding, not all columns add up to 100%.

The Netherlands has the highest percentage of those who only wash their vehicles at home.

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

Due to rounding, not all columns add up to 100%.

France and the Netherlands have the highest percentage of NON washers.

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

Due to rounding, not all columns add up to 100%.

Netherlands 2017

Netherlands 2017: Key Findings & Implications

Key Findings: Netherlands vs. 6 Country Total

The majority of Netherlands has washed their vehicle in the past year; however, slightly less than the other countries surveyed

- Wash their vehicles at a car wash less often.
- Washing at home is the most popular way to wash a vehicle.

The Netherlands believe that washing a vehicle at a PRO wash is a discretionary purchase

- Less likely to say that washing a vehicle is an important and necessary part of routine maintenance.
- Less likely to believe in the emotional and rational benefits of washing at a car wash over washing a vehicle at home.
- Rank car washes near the bottom of favorable retail experiences.

Wheel cleaning and wax/paint protectant are important additional services, but most other additional services are less important

- Purchased fewer additional services overall in the past year; however, they did purchase wax or paint protectant as an additional service more than other countries.

Key Findings: Netherlands vs. 6 Country Total

Many DIY washers in the Netherlands wash their vehicle at home because they enjoy washing their vehicles themselves

- Overall interest in washing at a car wash more often is low among PRO washers.
 - There is little interest in washing at a car wash instead of washing at home among DIY washers.
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Most PRO washers in the Netherlands are not aware of an unlimited wash program

- More than half who are aware of an unlimited wash program are also members.
- In addition to being a better value, those who are members of joined because a clean vehicle makes them feel better about themselves

A majority of the Netherlands did not receive an online car wash communication or offer in the past year

- Email and Facebook are the most popular platforms to receive and redeem car wash communications or offers.
- Less receptive to receiving car wash communications/offers.

Key Business-Building Thought Starters: Netherlands

Communicate the importance and necessity of washing a vehicle regularly

Demonstrate the efficiencies of washing at a car wash versus washing at home

Exceed the experience of home washing by improving upon the overall retail experience

Start using online communications such as email and Facebook to drive awareness and usage

Netherlands 2017: Car Wash Usage

The majority of Netherlands has washed their vehicle in the past year; however, slightly less so than the other countries surveyed.

Has your vehicle been washed in the past year?	6 Country Total A	Netherlands B
Total	N=1806	N=303
Yes	95% b	92%
No	5%	8% a

Only 35% of PRO washers in the Netherlands wash their vehicles at a PRO wash once a month or more often compared to 46% of all PRO washers surveyed.

On average, how often do you wash your vehicle at a car wash?	6 Country Total A	Netherlands B
Total	N=1539	N=215
Once a year	5%	6%
Every six months or so	17%	19%
Every couple of months	33%	40% A 
Once a month	30%	26%
A few times a month	13% B	6%
Once a week or more often	3%	3%

In the Netherlands, washing at home is the most popular way to wash a vehicle.

Which ONE of the following do you do most often to wash your vehicle?	6 Country Total A	Netherlands B
Total	N=1709	N=279
Used a <u>full-service</u> car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle on the outside and the interior is cleaned manually	25% B	20%
Used a car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle on the outside and the interior is not manually cleaned	18%	21%
Use a <u>rollover</u> car wash where the vehicle is stationary but the machine moves around the vehicle	17%	19%
Use a car wash where employees clean the vehicle by <u>hand</u>	6% B	2%
Use a <u>jet</u> wash (self-service) car wash	20% B	11%
Wash my vehicle <u>at home</u>	14%	28% A



The majority of respondents from the Netherlands use either one or two car wash locations.

Thinking about the past year, how many different car wash locations did you use?	6 Country Total A	Netherlands B
Total	N=1539	N=215
I only use one car wash location	36%	55% A
I usually only use one or two car wash locations	47%	36%
I probably have used three or more locations	15% B	6%
I don't know	3%	3%



**Netherlands 2017:
Overall Attitudes
About Washing a Vehicle**

The Netherlands believe that washing a vehicle is a discretionary purchase. Also, they are less likely to say that washing a vehicle is an important and necessary part of routine maintenance.

Which statement do you most agree with?	6 Country Total A	Netherlands B
Total	N=1709	N=290
Washing a vehicle is an important and necessary part of routine maintenance	62% B	40% 
Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me	26%	41% A
Washing a vehicle is not that important and something I do only if I have the extra money and/or time	12%	19% A

The Netherlands are less likely to believe in the benefits of washing at a car wash over washing a vehicle at home than the other countries surveyed.

% Agree: washing at a car wash vs. washing at home	6 Country Total A	Netherlands B
Total	N=1806	N=303
Washing at a car at a car wash is safer for the environment than washing a car at home	70% B	58%
Washing a car at a car wash uses less water than washing a car at home	62% B	46%
Washing a car at a car wash is less work than washing a car at home	86%	84%
Washing a car at a car wash is more enjoyable than washing a car at home	66%	62%
Washing a car at a car wash is safer for the car than washing a car at home	51% B	35%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	66% B	51%
Washing a car at a car wash is a better overall value than washing a car at home	58% B	43%
Washing a car at a car wash costs less than washing a car at home	41% B	33%
Washing a car at a car wash is faster than washing a car at home	85%	85%
Washing a car at a car wash is more convenient than washing a car at home	83% B	79%

Netherlands 2017: PRO Washers

PRO washers in the Netherlands are less likely to believe in the emotional and rational benefits of using a car wash.

% Agree: I use a car wash because:	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
A clean vehicle makes me feel good	70% B	61%
A clean vehicle is a good reflection on me	61% B	44%
I want the vehicle to look good for special occasions	63% B	48%
A car wash does a better job than I can do myself	55%	53%
It saves time	61%	57%
It costs less money than washing the vehicle myself	30% B	15%
It's a treat to have my vehicle washed	48% B	33%
Washing helps protect the value of my vehicle	61%	58%
When the weather is nice, it's something I enjoy doing	50% B	27%

PRO washers in the Netherlands are more likely to use a car wash because they don't enjoy washing it themselves or they have a coupon/price discount.

% Agree: I use a car wash because:	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
It is safer for the environment than washing at home	53% B	41%
I want to prevent my vehicle from rusting	55% B	40%
It uses less water than washing at home	47% B	37%
I don't enjoy washing it myself	39%	47% A
It's part of my car maintenance routine	60% B	52%
It's convenient to wash my vehicle while I am doing something else, like buying gas	46% B	20%
It's a fun family activity	23% b	18%
I have a coupon or other price discount	26%	34% A



The Dutch value convenience when it comes to using a car wash for the first time, but less so than other countries surveyed. They are also more motivated by coupons/price discounts.

Still thinking about the car wash you use most often, what made you go there the first time?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
It was convenient	61% B	50%
I could get petrol or do other shopping	24% B	17%
It was inexpensive	28% b	22%
It was a good value	36% b	29%
The employees seemed friendly and professional	24%	24%
I could trust that my car would be safe	23%	23%
The lines were not too long	37%	33%
Other cars looked great when they were done	19%	16%
I assumed I would feel personally safe when I was there	13% b	8%
They offered discounts and coupons	15%	22% A
Someone else recommended it	23%	19%
The car wash was clean and inviting	30%	34%
The wash process was fun to watch	11%	14%

The Netherlands value convenience when it comes to choosing one car wash over another; however, overall interest levels are lower for the Dutch for choosing one car wash over another.

Why do you choose to wash your vehicle at this particular car wash INSTEAD OF another car wash?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
It is convenient	44% b	37%
It's where I buy petrol or do other shopping	20% B	11%
It is inexpensive	24% B	17%
It is a good value	30% B	21%
The employees are friendly and professional	21%	17%
I trust that my car will be safe	22%	18%
The lines are never too long	31%	27%
The car looks great when they're done	24%	22%
I feel personally safe when I am there	16%	13%
They offer discounts and coupons	11%	16% a
It's the car wash my family and friends prefer	11%	10%
It is clean and inviting	23% B	17%
The wash process is fun to experience or watch	9%	9%
My kids enjoy it	6%	5%



Cleanliness of the car is most important to the Dutch when choosing a car wash; however, many aspects of a car wash are less important to the Dutch than other countries surveyed.

How important are each of the following when choosing a car wash?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
Cleanliness (the vehicle is clean; all dirt has been removed)	77%	73%
Dryness (the vehicle is dry; there is no water remaining)	57% B	42%
Shininess (the vehicle is shiny and bright)	60%	57%
Speed (I can get in and out quickly)	57% B	46%
Convenience (the car wash is easy to get to, or I have other reasons to go there – e.g., gasoline)	59% B	52%
Price (it is a good value)	68% B	56%
Hours of operation (the car wash is open when I want a wash)	60% B	47%
Human interaction (there is an employee who greets you and personally takes your payment)	31% B	23%
Non-human interaction (a touch screen or pay station takes your payment)	23% B	12%

Wheel cleaning and wax/paint protectant are important additional services to the Dutch, but most other additional services are less important.

How important are each of the following additional services?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
Interior vacuuming (done by someone else for me)	31% B	13%
Interior vacuuming (self-service)	39% B	29%
Wheel cleaning	44%	50% a 
Underbody cleaning (of vehicle)	49%	47%
Tire shining	33% B	25%
Wax or paint protectant	53%	56%
Exterior polishing	47% B	35%
Having the interior cleaned	43% B	18%
Vehicle hand/towel drying	33% B	13%
Interior fragrances/air freshener	30% B	15%

The Dutch believe that wax or paint protectant is an additional service that is worth paying more for; however, they also feel that many of the listed additional services are not worth paying more for.

Which of the following additional services at a car wash is WORTH PAYING MORE FOR?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
Interior vacuuming (done by someone else for me)	33% b	27%
Interior vacuuming (self-service)	17%	15%
Wheel cleaning	24%	28%
Underbody cleaning (of vehicle)	34% B	25%
Tire shining	19%	16%
Wax or paint protectant	43%	45%
Exterior polishing	31%	26%
Having the interior cleaned	30% b	24%
Vehicle hand/towel drying	17% B	11%
Interior fragrances/air freshener	12%	11%
Other, please specify	1%	2%
None of the above	16%	24% A



Overall interest in washing at a car wash more often is low among PRO washers in the Netherlands.

How would each of the following influence your decision to wash your vehicle at a car wash MORE OFTEN?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
If it was more convenient	45% B	26%
If I could get petrol or do other shopping	35% B	16%
If it was less expensive	58% B	50%
If it was a good value	65% B	54%
If the employees were friendly and professional	48% B	31%
If I could trust that my car would be safe	52% B	38%
If the lines were not too long	53% B	40%
If the car would look great when they're done	60% B	48%
If I would feel personally safe when I am there	40% B	28%
If they offered discounts and coupons	49% B	37%
If someone else recommended it	28% B	13%
If the car wash was clean and inviting	48% B	33%
If the wash process was fun to experience or watch	27% B	17%
If my kids said they'd enjoy it	21% B	10%

Overall interest in washing at a car wash more often is low among PRO washers in the Netherlands.

How would each of the following influence your decision to wash your vehicle at a car wash MORE OFTEN?	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
If they offered a monthly unlimited washing program/subscription	38% B	19%
If they offered a free exterior re-wash if it rains/snows within 3 days	42% B	20%
If the interior waiting area was clean	37% B	20%
If there were snacks or beverages for sale while I waited	23% B	10%
If they offered free coffee, tea or water while I waited	32% B	15%
If they recycled the wash water	32% B	20%
If they used less water	31% B	16%
If they used soap that is safe for the environment	39% B	22%
If the car wash was more involved in the community	24% B	13%
If I could sit inside the car when it goes through the wash	30% B	21%
If the car wash owner treats their employees in a correct and fair manner	40% B	28%

Grocery stores and restaurants are rated as the most favorable retail experiences for the Dutch while car washes fall near the bottom.

Thinking about your overall experience as a consumer, please rank the following businesses from best to worst: Top 2 Box	6 Country Total PRO A	Netherlands PRO B
Total	N=1539	N=215
My favorite Grocery Store	1	1
My favorite Restaurant	2	2
My favorite Car Wash	3	5
My favorite Petrol Station	4	3
My favorite Hair Salon or Barber Shop	5	4
My favorite Bank	6	6



Netherlands 2017: Unlimited Wash Programs

More than half of those in the Netherlands who are aware of an unlimited wash program are also members, which means that driving awareness could increase membership to these programs.

Are you a member of a program where you pay for an unlimited number of washes at the car wash you frequent?	6 Country Total A	Netherlands B
Aware of an unlimited wash program	N=326	N=45
Yes	60%	51%
No	40%	49%

74% of unlimited wash program members in the Netherlands report visiting their unlimited wash program 2 to 4 times a month.

Thinking about an average month, how many times do you visit the car wash where you are a member of an unlimited wash program?	6 Country Total A	Netherlands B
Member of an unlimited wash program	N=194	N=23
1 time	16%	17%
2 times	27%	22%
3 times	32%	26%
4 times	19%	26%
5 times	4%	9%
6 or more times	2%	0%



78% of unlimited wash program members in the Netherlands feel that visiting their unlimited wash program 2 to 4 times a month is enough to justify the expense.

Thinking about what you pay for an unlimited number of washes, how many times do you have to visit in a month to have it make economic sense?	6 Country Total A	Netherlands B
Member of an unlimited wash program	N=194	N=23
1 time	15%	17%
2 times	21%	13%
3 times	36%	35%
4 times	20%	30%
5 times	7%	4%
6 or more times	2%	0%

