Australian Car Wash Association Consumer Study

Oct 2023

PPL.INSIGHTS



Objectives And Overview

AWCA is looking to undertake a consumer research study to help drive greater insight to assist their members and new investors.

In 2018, the ICA completed a consumer study on the Australian market - A Quantitative Study (May 2018) of 1,000 Australian respondents - along with US and Europe benchmarks.

This research study is looking to emulate the 2018 study to understand key shifts that have occurred over the past 5 years (with a focus on the Australian market).





Tracking changes

Updating the report will allow members to track changes in consumer behaviour from 2018 to 2023.



Investment direction

The report will help existing members looking to expand existing investments or alter business models. The report will also help existing members and new investors with loan applications.



Deeper Insights

Whilst not in the brief, this proposal also includes an option to ask several extra questions that will help build deeper insights into the drivers and barriers of the Australian car wash consumer.

The Research Approach



Online Survey

15-minute survey
speaking to a
representative sample
of respondents
recruited from an online
research panel in both
Australia and the USA.



Who

Car wash users and Non-Users

Car wash users must have washed their car at a car wash in the past 12 months



Sample Size

Total sample n= 2000 (n=1000 in Aust and n=1000 in USA)

Nat Representative by age, gender and location



Fieldwork Timings

Fieldwork was conducted between 22nd Sept- 2 Oct 2023

Table of Contents

PART 1

2018 vs 2023 Consumer Study

- Overall usage
- Key drivers
- Frequency
- Additional services
- Communication
- Price satisfaction
- Vehicle age
- Top line analysis by wash type
 - Full service
 - Exterior
 - Rollover
 - Hand
 - Jet

PART 2

Further Analysis

- The switcher
- Heavy vs light users
- Roll over (includes automatics and touch free) Vs Non-roll over users
- Other Questions
 - General car questions
 - Car wash questions
 - Subscription questions
 - Wash at home questions
 - Safety feature questions

PART 1

2018 vs 2023 Consumer Study





2018 vs 2023 Consumer Study

Overall Usage

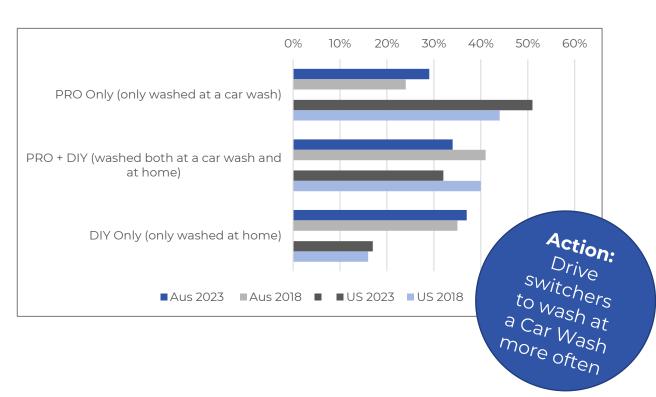
In Australia there has been a significant increase in the % of consumers that wash their car at a car wash most often + 13% increase.

However, Australia still lags behind America when it comes to car wash usage. This shows there is plenty of upside when it comes to car wash usage in Australia.

The key to growth, as shown by the American market, will be through those consumers **that switch** between washing their cars at home and the car wash.

	Aus 2023 A	Aus 2018 B	Aus Shift	US 2023 C	US 2018 D
Total	N=1000	N=965		N=1000	N=1534
PRO Most Often (washed at a car wash)	59% B	46%	+13	69% A	70%
DIY Most Often (washed at home)	41%	54% A	-13	31%	30%

	Aus 2023	Aus 2018	Aus	US 2023	US 2018
	А	В	Shift	С	D
Total	N=1277	N=965		N=1186	N=1534
PRO Only (only washed at a car wash)	29% B	24%	+5	51% AD	44%
PRO + DIY (washed both at a car wash and at home)	34%	41% A	-7	32%	40% AC
DIY Only (only washed at home)	37%	35%	+2	17%	16%



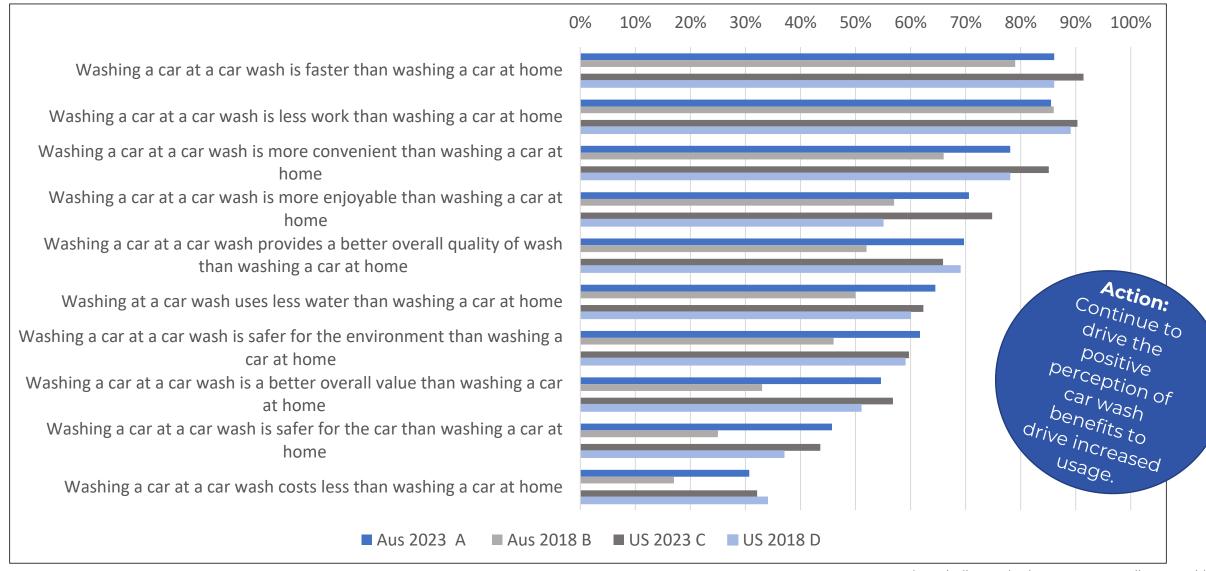
Car Wash Benefits

	Aus 2023	Aus 2018	Aus	US 2023	US 2018
	А	В	Shift	С	D
	N=1000	N=965		N=1000	N=1606
Washing a car at a car wash is faster than washing a car at home	86% B	79%	+7	91%	86%
Washing a car at a car wash is less work than washing a car at home	86%	86%	-	90%	89%
Washing a car at a car wash is more convenient than washing a car at home	78% B	66%	+8	85%	78%
Washing a car at a car wash is more enjoyable than washing a car at home	71% B	57%	+14	75%	55%
Washing a car at a car wash provides a better overall quality of wash than washing a car at home	70% B	52%	+18	66%	69%
Washing a car at a car wash uses less water than washing a car at home	65% B	50%	+15	62%	60%
Washing a car at a car wash is safer for the environment than washing a car at home	62% B	46%	+16	60%	59%
Washing a car at a car wash is better overall value than washing a car at home	55% B	33%	+22	57%	51%
Washing a car at a car wash is safer for the car than washing a car at home	46% B	25%	+21	44%	37%
Washing a car at a car wash costs less than washing a car at home	31% B	17%	+14	32%	34%

There has been a significant increase in almost all car wash attitude statements in Australia.

This demonstrates that Australian consumers have a more positive view and a greater understanding of the benefits of using a car wash. In fact, in this regard, the Australian consumers perspective of car wash benefits is on par with the American consumer.

Car Wash Benefits



Car Wash Frequency



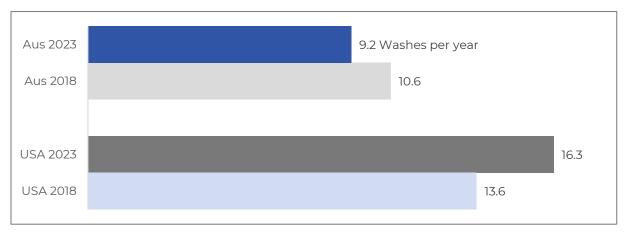
Although overall penetration/usage has increased, car wash frequency in Australia has declined.

This is demonstrated by the drop off in consumers that wash a few times a month. This shift is not uncommon and happens in all industries. As the number of users increase, they tend to be lighter users- so overall frequency drops.

Another reason for the decline could be the overall increase in cost of living. As washing the car can be quite discretionary.

The key to increasing frequency will be to incentivise light/medium users to wash their car more often. The value proposition will be imperative- demonstrating the benefit of both cost and quality.

On average, how often do you wash your vehicle	Aus 2023	Aus 2018	Aus	US 2023	US 2018
at a car wash?	А	В	Shift	С	D
Total	N=800	N=630		N=800	N=1281
Once a year	6%	5%	+1	5%	4%
Every six months or so	21% CD	19%	+2	11%	12%
Every couple of months	36%	33%	+3	26%	32%
Once a month	23%	24%	-1	23%	26%
A few times a month	10%	16% B	-6	23% AB	21%
Once a week or more often	3%	3%	-	13% ACD	6%



Importance of Additional Services

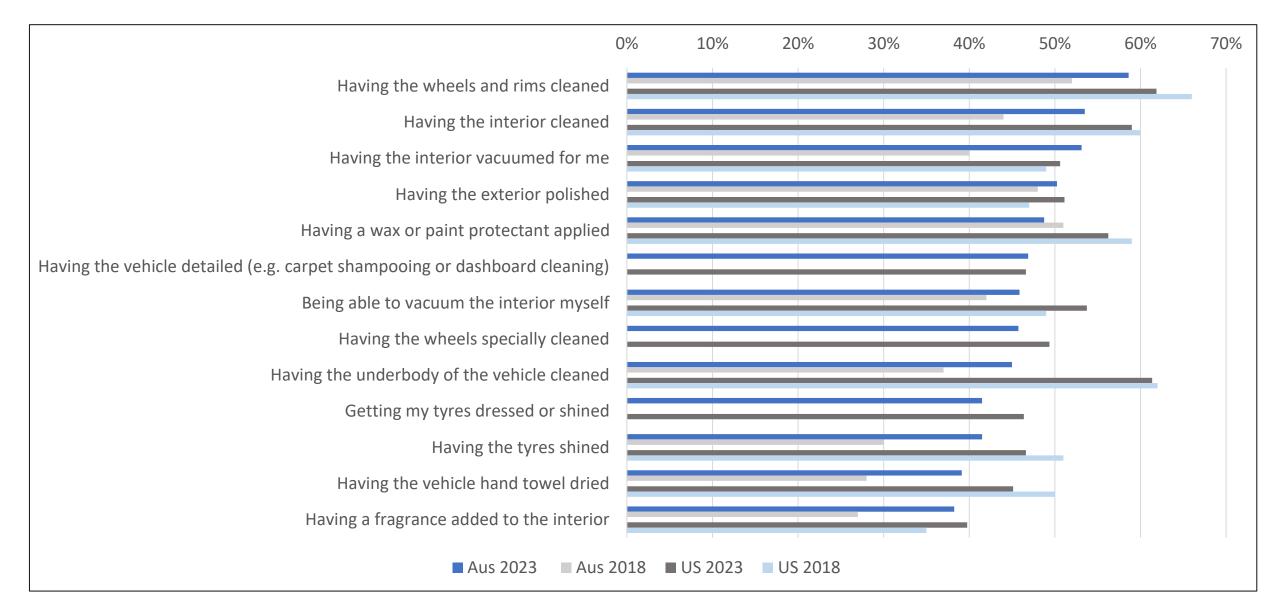
Action:
Leverage the
growing need
for additional
services to
drive
customer
Value

How important are each of the following additional services?	Aus 2023	Aus 2018	Aus	US 2023	US 2018
(5 point scale; Extremely/Very important)	A	В	Shift	C	D
Total	N=800	N=630		N=800	N=1281
Having the wheels and rims cleaned	59% B	52%	+7	62%	66%
Having the interior cleaned	54% B	44%	+10	59% A	60%
Having the interior vacuumed for me	53% B	40%	+13	51%	49%
Having the exterior polished	50%	48%	+2	51%	47%
Having a wax or paint protectant applied	49%	51%	-2	56% A	59%
Having the vehicle detailed (e.g. carpet shampooing or dashboard cleaning)	47%	-	-	47%	
Being able to vacuum the interior myself	46%	42%	+4	54% A	49%
Having the wheels specially cleaned	46%	-	-	49%	
Having the underbody of the vehicle cleaned	45% B	37%	+8	61% A	62%
Getting my tyres dressed or shined	42%	-	-	46%	
Having the tyres shined	42% B	30%	+12	47%	51%
Having the vehicle hand towel dried	39% B	28%	+11	45% A	50%
Having a fragrance added to the interior	38% B	27%	+11	40%	35%

The importance of additional services in the Australian market is increasing and, in most areas, is on par with the American market.

The key increases are in wheel cleaning, interior cleaning and vacuuming, hand towel drying and under body cleaning.

Importance of Additional services cont...



Car Wash Communication

Communication has significantly increased in the Australian market, with 12% of consumers receiving digital communications in the past year (although off a small base).

However, Australia lags behind the American market when it comes to communication, with almost a quarter of consumers receiving communications in America.

The shifts in coupons used should be treated with caution as the 2018 sample was very low. However, email still leads followed by YouTube and Facebook.

There is genuine opportunity to drive repeat and increased usage and awareness through building an email database. Also targeted/local social media advertising can play a role in customer acquisition; however, this can be more expensive.

Have you received any online communications	Aus 2023	Aus 2018	Aus	US 2023	US 2018
or offers from a car wash in the past year?	Α	В	Shift	С	D
	N=1000	N=1000		N=1000	N=1606
Yes	12% B	4%	+8	24% AD	11%
No	88%	96%	-8	76%	89%

Have you used any coupons or offers from	Aus 2023	Aus 2018	Aus	US 2023	US 2018
any of the following in the past year?	Α	В	Shift	С	D
	N=122	N=37*		N=240	N=181
Email	31%	51% A	-20	29%	31%
YouTube	25%		-	24%	
Facebook	19%	24%	-5	22%	28%
Car wash website	16%	24%	-8	22%	25%
I have not used any online communications or promotional offers	14%		-	16%	
Instagram	12%		1	24% A	
Banner ad on a website	10% A	5%	+5	8%	7%
Search engine (Google/Yahoo/Bing)	10%	14%	-4	9%	15%
Other coupon app or website i.e. Coupons.com, Groupon, LivingSocial	8%		-	5%	
Snapchat	8%		-	11%	
Twitter	8%	8%	-	13% A	17%
Pinterest	7%		-	7%	
Coupon bloggers	4%		-	10%	

^{*} Low sample size- treat with caution

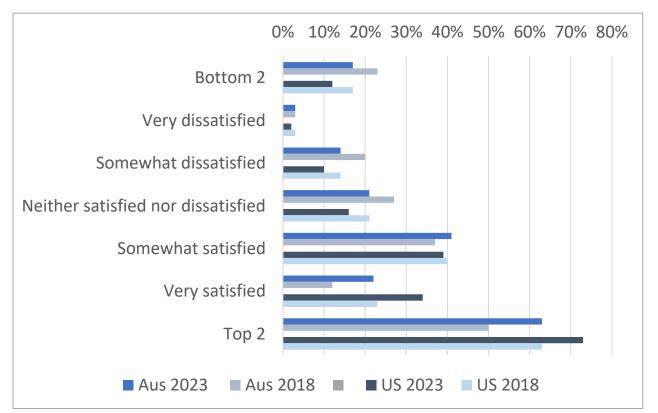
PriceSatisfaction

Price satisfaction has significantly increased in Australia with 63% either somewhat satisfied or very satisfied.

However, price satisfaction is still significantly higher in America and has also increased since 2018.

opportunity:
Continue to
Continue to
drive the value
proposition to
ensure
consumers feel
they are getting
bang for buck.

How satisfied are you with	Aus 2023	Aus 2018	Aus	US 2023	US 2018
the price you pay per wash?	Α	В	Shift	С	D
Total	N=800	N=630		N=800	N=1281
Bottom 2	17%	23% A	-6	12%	17%
Very dissatisfied	3%	3%	-	2%	3%
Somewhat dissatisfied	14%	20%	-6	10%	14%
Neither satisfied nor dissatisfied	21%	27%	-6	16%	21%
Somewhat satisfied	41%	37%	+4	39%	40%
Very satisfied	22% B	12%	+10	34%DA	23%
Top 2	63% B	50%	+13	73% DA	63%





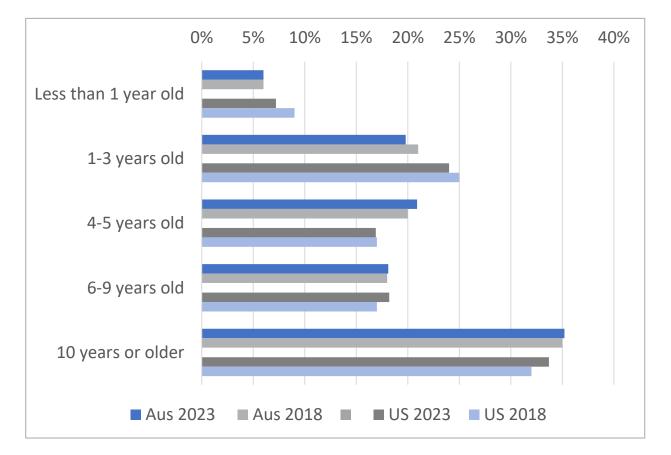
The age of vehicles in Australia has remained steady since 2018.

American consumers drive slightly newer cars.

It was projected in the last study that due to a number of factors car ownership would shift to younger vehicles that required greater upkeep (including car washing). This however has not occurred and could be due to COVID supply disruptions or increases in cost of living.

opportunity:
There is still
There is still
almost 50% of
almost 50% of
cars under 5
years old to
years old to
influence with
car wash
maintenance.

How old is the vehicle	Aus 2023	Aus 2018	Aus	US 2023	US 2018
you drive most often?	А	В	Shift	С	D
Total	N=1000	N=1000		N=1000	N=1606
Less than 1 year old	6%	6%	-	7%	9%
1-3 years old	20%	21%	-1	24% A	25%
4-5 years old	21%	20%	+1	17%	17%
6-9 years old	18%	18%	-	18%	17%
10 years or older	35%	35%	-	34%	32%



AreasOf Learning

Although usage/penetration of car washing in Australia is up, frequency is down.

Opportunity to drive usage with medium-to-light car wash users through increased communication promoting awareness and deals.

The value proposition is extremely important and will only increase as cost-of-living pressures increase.

	Aus 2023	Aus 2018	Aus Shift	US 2023	US 2018
Incidence of washing in the past year	96%	96%	-	95%	96%
Average annual PRO wash frequency	9.3x/ year	10.6x/ year	-1.3	16.3x/ year	13.6x/ year
% of PRO only washers	29%	24%	+5	51%	44%
% of DIY only washers	37%	35%	+2	17%	16%
% who received online car wash communications in the past year	12%	4%	+8	24%	11%
Awareness of unlimited washing programs	16%	6%	+10	47%	22%
Ranking of overall experience among other retail service businesses	7 out of 10	8 out of 10	-1	9 out of 10	5 out of 10
Satisfaction with price per wash (extremely/ very satisfied)	63%	50%	+13	73%	63%

Car Wash Used Most Often

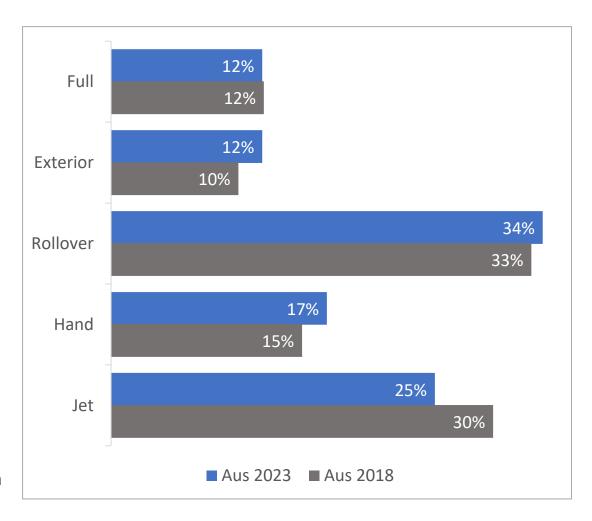
Full-Service Most Often: Used a full-service car wash that pulls the vehicle on a conveyor while the equipment cleans the vehicle on the outside and the interior is cleaned manually

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

Rollover Most Often (includes automatics and touch free): Used a rollover car wash in which the vehicle is stationary as the machine moves around the vehicle

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

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



Car Wash Frequency

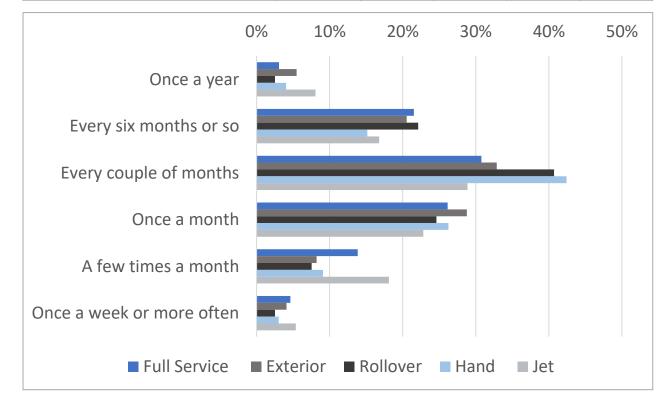
Users of Full and Jet services are significantly more likely to wash their car a few times a month or more.

Rollover users are less likely to wash more often. This could be due to the cost as well as the perceived damage it could do to the vehicle.

Although there has been a decline in frequency, close to 40% of car wash users wash their vehicle once a month or more (across all car wash types).

Opportunity:
Drive increased
Usage amongst
Usage amongst
Consumers that
Consumers

On average, how often do you	Full	Exterior	Rollover	Hand	Jet
wash your vehicle at a car wash?	А	В	С	D	Е
Total	N=65	N=73	N=199	N=99	N=149
Once a year	3%	5%	3%	4%	8%
Every six months or so	22%	21%	22%	15%	17%
Every couple of months	31%	33%	41%	42%	29%
Once a month	26%	29%	25%	26%	23%
A few times a month	14%	8%	8%	9%	18%
Once a week or more often	5%	4%	3%	3%	5%

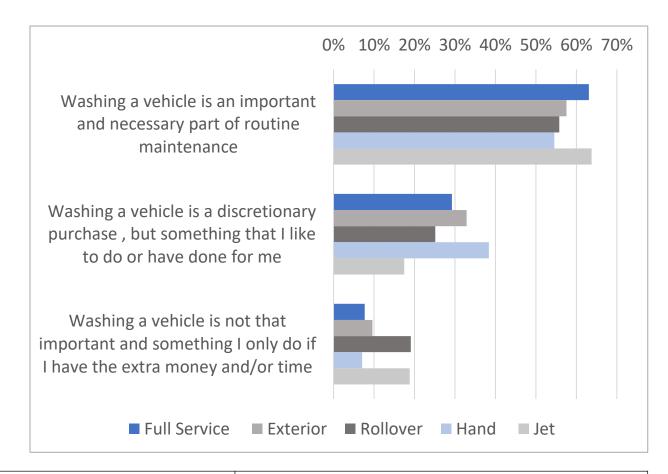


Car Wash Attitudes

Car washing is considered an important and necessary part of routine maintenance.

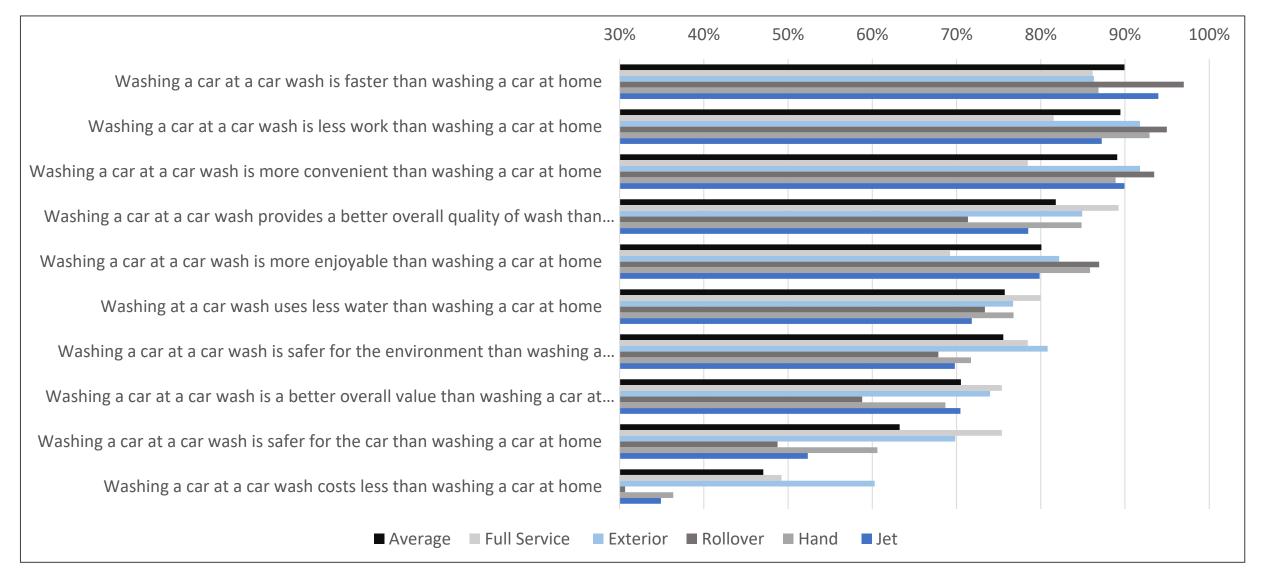
Over 55% of users from all wash type's view washing as an important and necessary part of routine maintenance. This finding is most evident with fullservice and jet washers.

Exterior, Rollover and Jet users are less likely to see the importance. Jet users seem to be quite polarising.

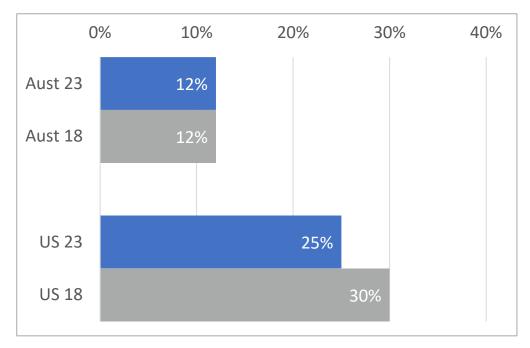


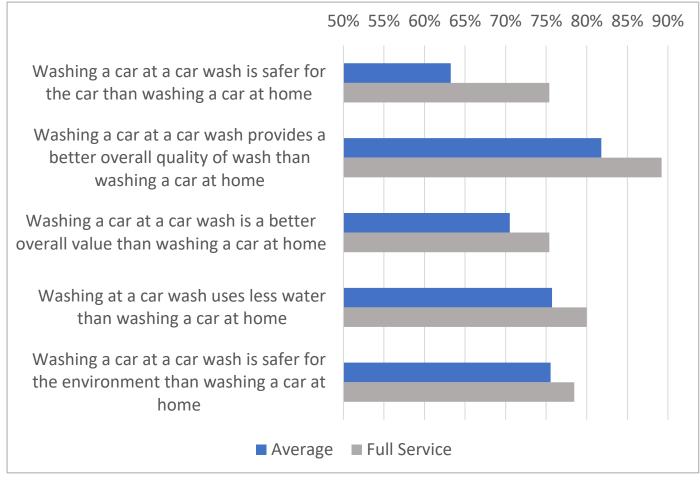
Which statement do you most agree with?	Full Service	Exterior	Rollover	Hand	Jet
	А	В	С	D	Е
Total	N=65	N=73	N=199	N=99	N=149
Washing a vehicle is an important and necessary part of routine maintenance	63%	58%	56%	55%	64%
Washing a vehicle is a discretionary purchase, but something that I like to do or have done for me	29%	33%	25%	38%	17%
Washing a vehicle is not that important and something I only do if I have the extra money and/or time	8%	10%	19%	7%	19%

Car Wash Attitudes



Full Service Most Often





This chart ranks top 5 statements that pull apart from the average

Full-service users are more likely to see the benefits of car washing across the board.

They see the benefits of car washing as safer for their car, better quality and better value.

Full Service Most Often

Likes

Convenience and Efficiency

- Quick and Professional
- Convenience
- Everything Done

Quality and Satisfaction

- Clean and Professional Appearance
- Attention to Detail

Cost and Pricing

- Affordable and Reasonable Cost
- Set Price
- Savings



Dislikes

Cost

Expensive

Waiting and Time

- Waiting
- Time-Consuming
- Lack of Flexibility
- Inconvenience

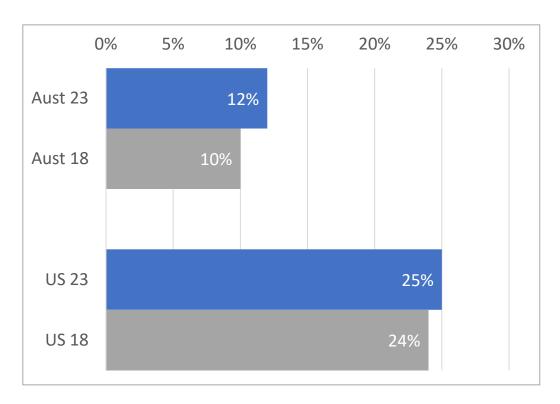
Quality and Service

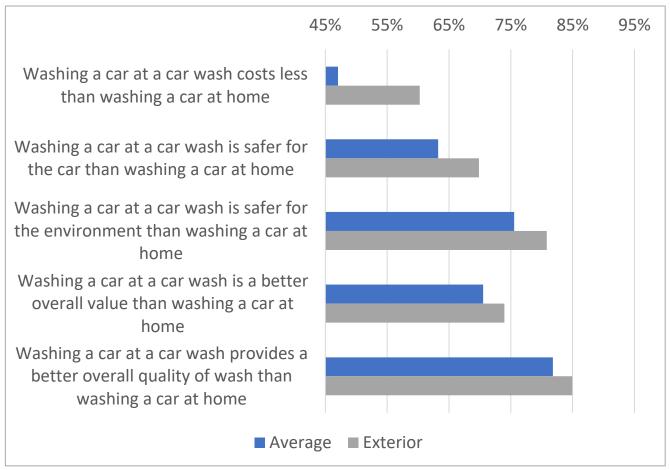
Missed Spots

Environmental and Water

- Waste of Water
- Chemical Effects on Paint

Exterior (tunnel) Most Often





This chart ranks top 5 statements that pull apart from the average

Exterior are more pragmatic in their assessment of car wash benefits.

They see the benefits of car washing as costing less than home, safer for their car and safer for the environment...

Exterior (tunnel) Most often

Likes

Convenience and Efficiency

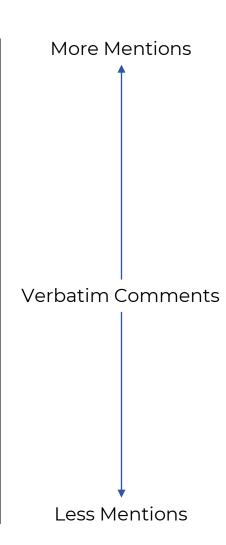
- Quick
- Convenient locations

Quality and Satisfaction

- Clean and shiny
- Good service
- Friendly staff

Cost and Pricing

• Affordable and Reasonable Cost



Dislikes

Cost

- Expensive
- Inconsistent pricing

Waiting and Time

- Waiting
- Time-Consuming
- Inconvenient locations

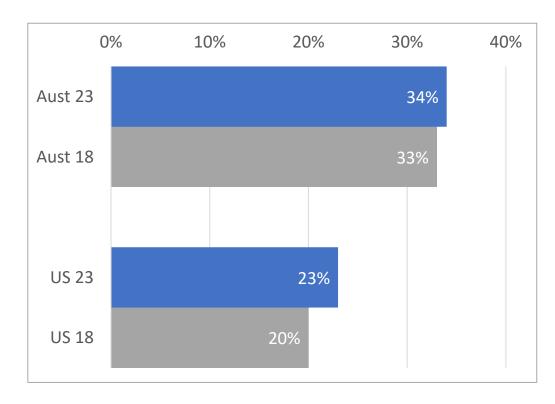
Quality and Service

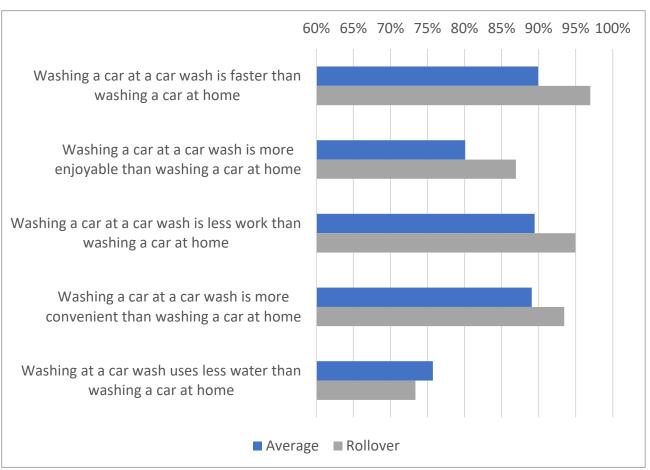
- Inadequate cleaning
- Scratches and damage

Environmental and Water

Waste of Water

Roll Over (includes automatics and touch free) Most Often





This chart ranks top 5 statements that pull apart from the average

Rollover users value the more convenient benefits.

They see the benefits of car washing as faster, more enjoyable and less work.

Roll Over (includes automatics and touch free) Most Often

Likes

Convenience and Efficiency

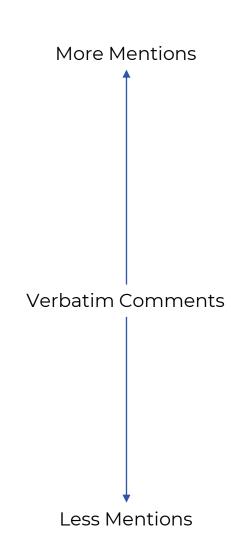
- Quick and easy
- Convenient locations
- Hands off/ automated
- No queues

Quality and Satisfaction

- Clean and shiny
- Various options to choose
- Friendly staff
- Fun experience

Cost and Pricing

Value for money



Dislikes

Cost

- Expensive
- Inconsistent pricing

Waiting and Time

Long wait times

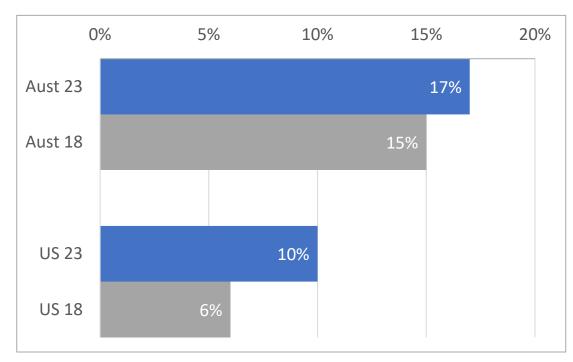
Quality and Service

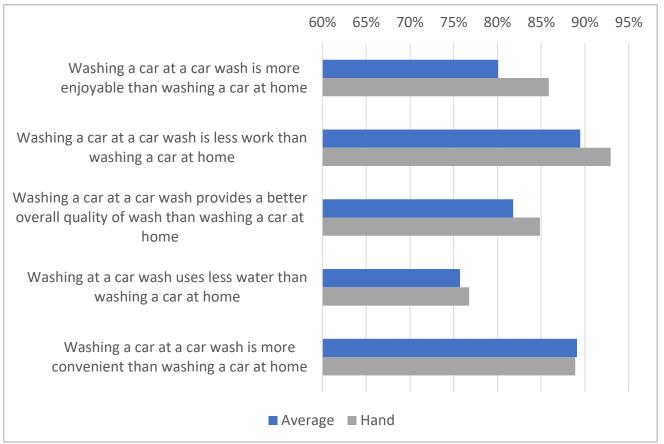
- Inadequate cleaning
- Ineffective drying
- Scratches and damage
- Unkept facilities
- No service
- Potential damage to parts of the car

Environmental and Water

- Waste of Water
- Environmental impact

Hand Most Often





This chart ranks top 5 statements that pull apart from the average

Hand wash user find it more enjoyable and less work than washing at home.

They see the benefits of car washing as more convenient/less work, using less water and providing a better-quality wash.

Hand Most Often

Likes

Convenience and Efficiency

- Quick
- Convenient locations near shopping
- Café waiting facilities

Quality and Satisfaction

- Clean and shiny
- Good service
- Friendly staff
- Less risk to car
- Reliable and consistent

Cost and Pricing

Affordable and Reasonable Cost



Dislikes

Cost

Expensive

Waiting and Time

- Waiting
- Time-Consuming
- Inconvenient locations

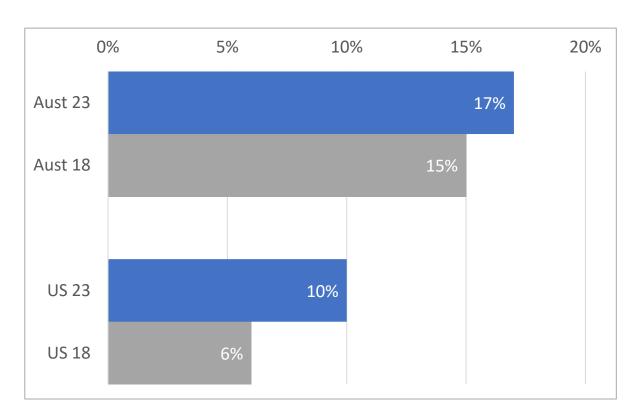
Quality and Service

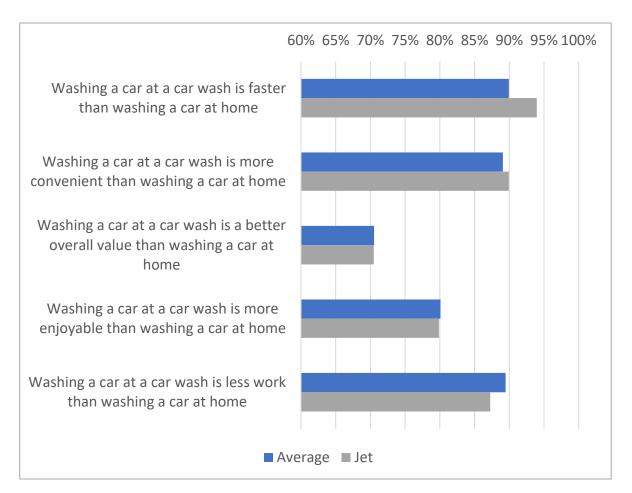
- Inadequate cleaning
- Cleanliness and customer facilities

Environmental and Water

Waste of Water

Jet (self service) Most Often





This chart ranks top 5 statements that pull apart from the average

Jet users are less likely to see the benefits overall.

They see it as more convenient, faster and better value.

Jet (self service) Most Often

Likes

Convenience and Efficiency

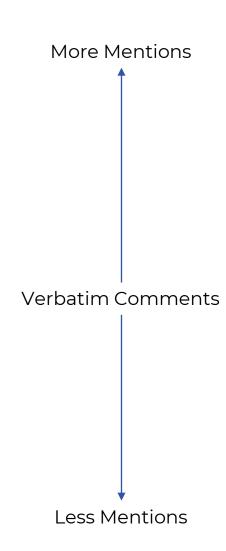
- Convenient and accessibility
- Quick
- Availability
- Good hours

Quality and Satisfaction

- Clean and shiny
- No interaction with others
- Control and independence
- Reliable and consistent

Cost and Pricing

- Affordability
- Multiple payment options



Dislikes

Cost

Unknown cost

Waiting and Time

- Waiting/ Long queues
- Time-Consuming
- Rushed experience

Quality and Service

- Reliability issues
- Inadequate cleaning
- Cleanliness of facilities

Environmental and Water

Waste of Water

Summary and Actions

Summary

- 1. In Australia there has been a significant increase in the % of consumers that wash their car at a car wash most often 13% increase. However, Australia still lags behind America when it comes to car wash usage. This shows there is plenty of upside when it comes to car wash usage in Australia.
- Although overall penetration/usage has increased, average car wash frequency in Australia has declined.
- 3. The importance of additional services in the Australian market is increasing and, in most areas, is on par with the American market.
- 4. Communication has significantly increased in the Australian market, with 12% of consumers receiving digital communications in the past year (although off a small base). Still lags behind the USA.

Actions

- The key to growth, as shown by the American market, will be through those consumers that switch between washing their cars at home and the car wash.
- The key to increase frequency will be to incentivise light/medium users to wash their car more often. The value proposition will be imperative - demonstrating the benefit of both cost and quality.
- 3. There is genuine opportunity to drive repeat and increased usage and awareness through building an email database. Also targeted/local social media advertising can play a role in customer acquisition; however, this can be more expensive.
- 4. There is a small cohort of consumer that mention water wastage as an issue. **During times of drought**, there is an **opportunity to give consumers peace of mind around water usage**.

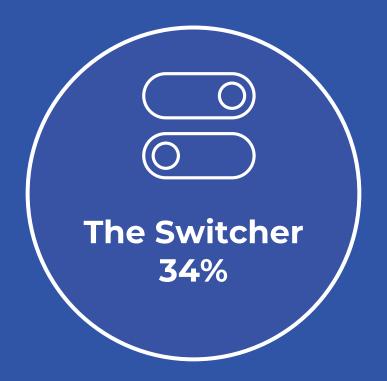
PART 2

Further Analysis Consumer Study

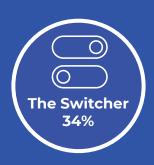




Targeting the Switcher



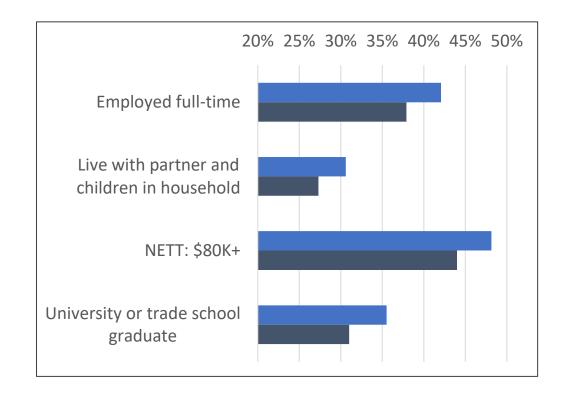
"The Switcher washes their car at both a car wash and at home"



What being The Switcher means...

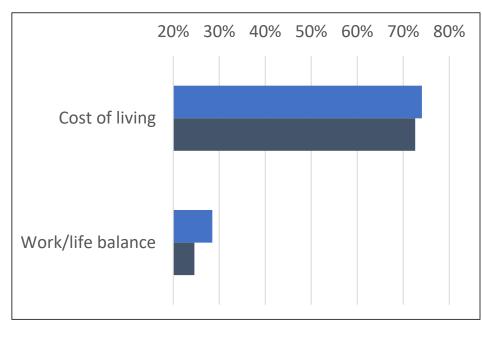
Profile skew

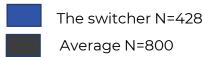
They're more likely to have a family, be employed full time, educated and with a higher-than-average household income.

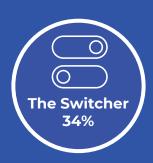


Main life pressures

However, they are significantly more likely to feel financial pressures shown by cost-of-living pressures and work life balance issue. This would impact discretionary spending



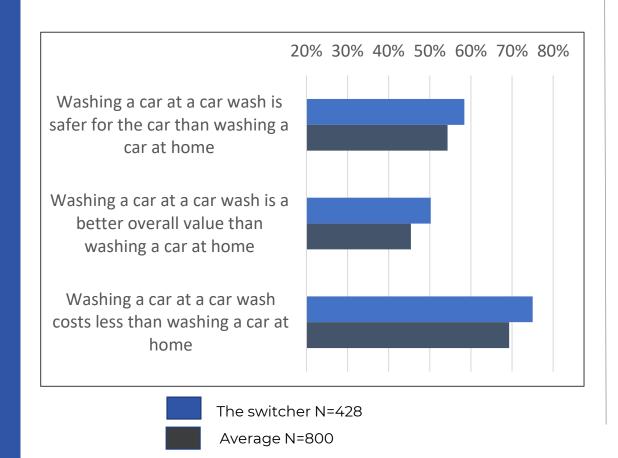




What being The Switcher means...

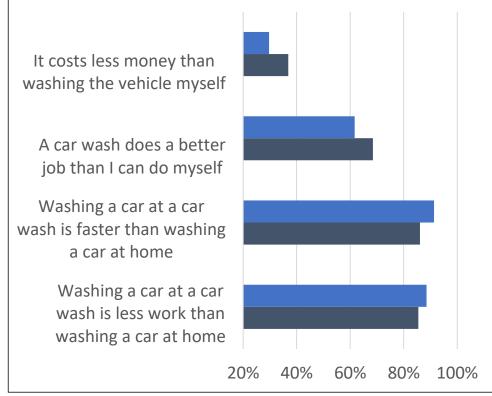
Key Benefits - Disagree

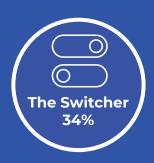
The Switcher is significantly less likely to see the value in washing their car at a car wash. They also disagree that it is safer for the car to wash at a car wash.



Key Benefits - Agree

They are also significantly less likely to agree that it costs less, or the car wash could do a better job. They do however like the speed and ease of a car wash.





What being The Switcher means...

Why don't you wash your vehicle at a car wash more often? OPEN ENDED

Cost-Related:

Too expensive: Many respondents highlight that the cost of using car wash services is a significant deterrent. They consider it expensive and mention that it becomes costly, especially if done more frequently.

Cost and time constraints: Some mention that cost, coupled with time constraints, is a barrier to using car wash services. They find it both expensive and time-consuming.

Financial reasons: Financial constraints and the need to save money are mentioned by several individuals as reasons for avoiding car wash services.

Preference for DIY and Convenience:

Prefer to do it at home: Many respondents express a preference for washing their cars at home because it's cheaper and more convenient.

Not conveniently located: The inconvenience of not having a car wash service conveniently located is a barrier.

Time constraints and low priority:

Time constraints, busy schedules, and the belief that car washing is a low priority, contribute to the preference for not using car wash services.

Procrastination: Some respondents admit to laziness or a lack of motivation to go to a car wash.

Perceived Unnecessity Trends:

Car doesn't get dirty often:

Several respondents believe that their cars don't get dirty frequently, which leads to the perception that regular car washing is unnecessary.

Not a priority: A few respondents indicate that they do not prioritize car washing due to other commitments or because they don't consider it a high-priority task.

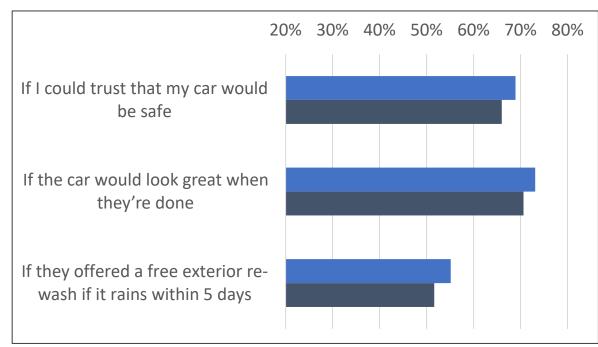
Better results DIY: Some mention that they prefer to wash their cars themselves because they believe it yields better results or is gentler on the vehicle.



What being The Switcher means...

What would get them using a car wash more often?

The Switcher is significantly more likely to use a car wash more often if they had some sort of guarantee. Either that their car would be safe, or the job would be done to their satisfaction.







What being The Switcher means...

What would get them using a car wash more often? OPEN ENDED

Cost-Related

Better deals: Many respondents emphasize that they would use car wash services more frequently if there were better deals. Lower costs, discounts, bulk buy deals, or loyalty bonuses are mentioned as factors that would encourage them to use car wash services

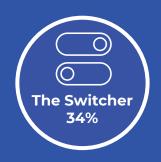
More affordable: Several respondents express a desire for more affordable pricing, highlighting that cost plays a crucial role in their decision to use car wash services more frequently. They mention the need for value for money and a desire for cheaper options.

Time and Convenience-Related:

Convenience: Some respondents mention factors related to convenience, such as closer car wash locations and quicker, more efficient experiences. Convenience is seen as a factor that could encourage more frequent use.

More time: A few individuals express that they would use car wash services more frequently if they had more free time, highlighting the time constraint as a significant factor influencing their choice.

Efficiency: Some respondents are interested in quick and efficient car washing methods, such as touchless car washes or waterless wash products, which can save them time.



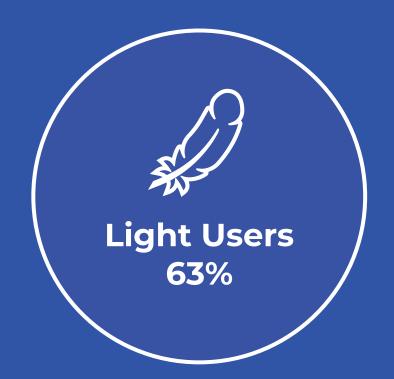
The Switcher positioning

For **The Switcher** who is looking for all the ease and convenience when washing their car, the car wash needs to provide reassurance that they are getting the best possible value. Somehow showing that their time is better spent elsewhere - than washing a car at home. Also, if a guarantee can be provided- even better!

Heavy vs Light users



"Heavy users wash their car at a car wash once or more a month"

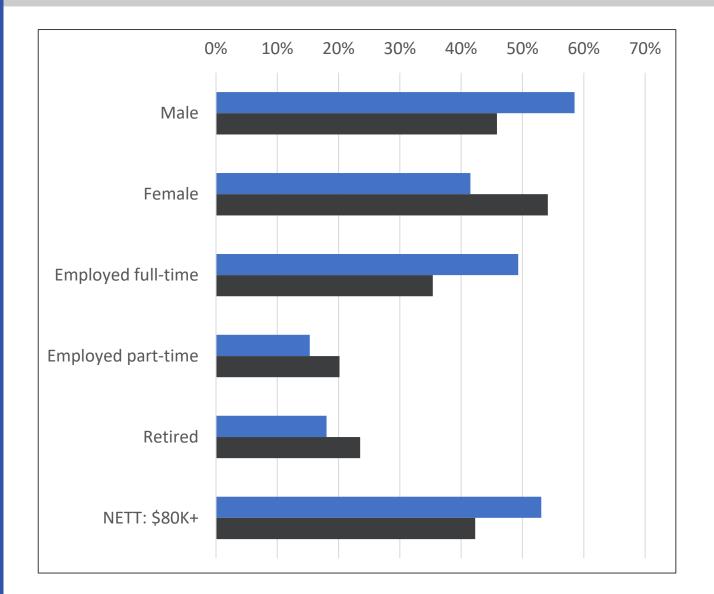


"Light users wash their car at a car wash every couple of months or less"



Light Users 63%

What being a Heavy or Light user means...



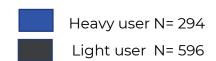
Profile skew

Heavy users:

Are significantly more likely to be male, employed full time and they are higher income earners (above \$80k pa).

Light Users:

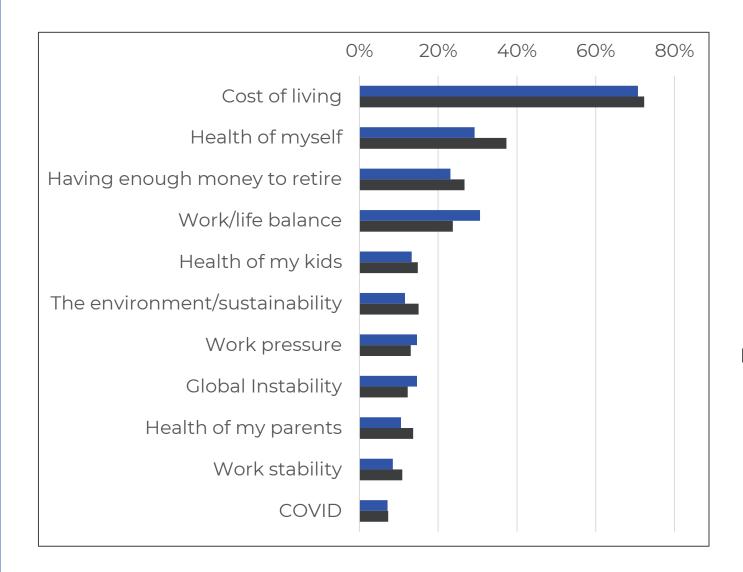
Are significantly more likely to be female, employed part time or retired and they are lower income earners (below \$80k pa).





Light Users 63%

What being a Heavy or Light user means...



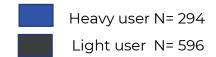
Profile skew

Heavy users:

Are more likely to feel the stress of work/life balance, work pressure and global issues.

Light Users:

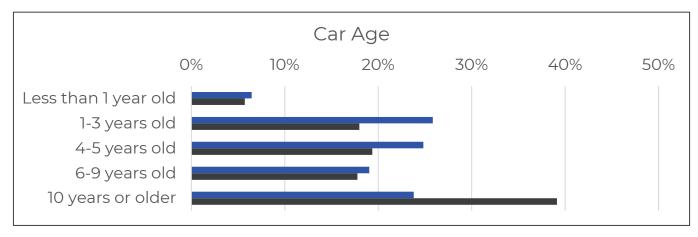
While light users are more likely to feel the stress of cost of living, having enough money to retire and work stability. This would all relate to their lower income.

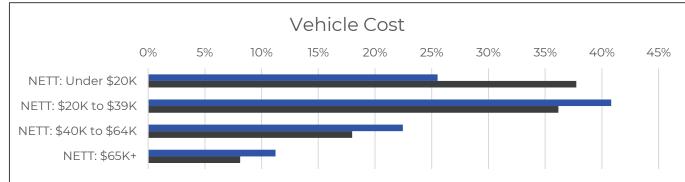


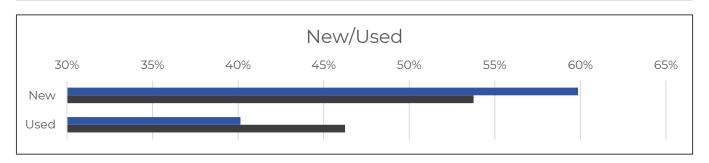


Light Users 63%

What being a Heavy or Light user means...







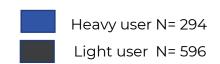
Profile skew

Heavy users:

Are more likely to drive younger more expensive vehicles that were purchased new.

Light Users:

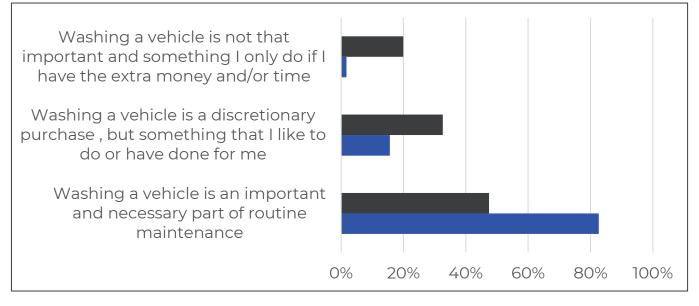
While light users are more likely to drive older less expensive vehicles that were purchased used.

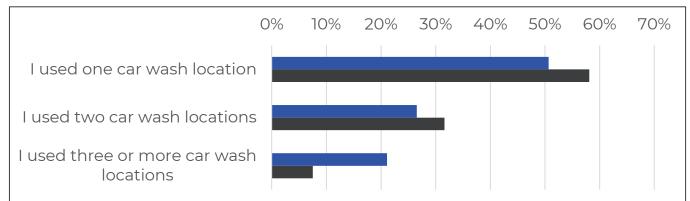




What being a Heavy or Light user means...







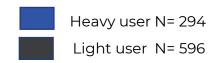
Profile skew

Heavy users:

Are more likely to see car washing as an important part of routine maintenance. They are also more likely to use multiple car wash locations.

Light Users:

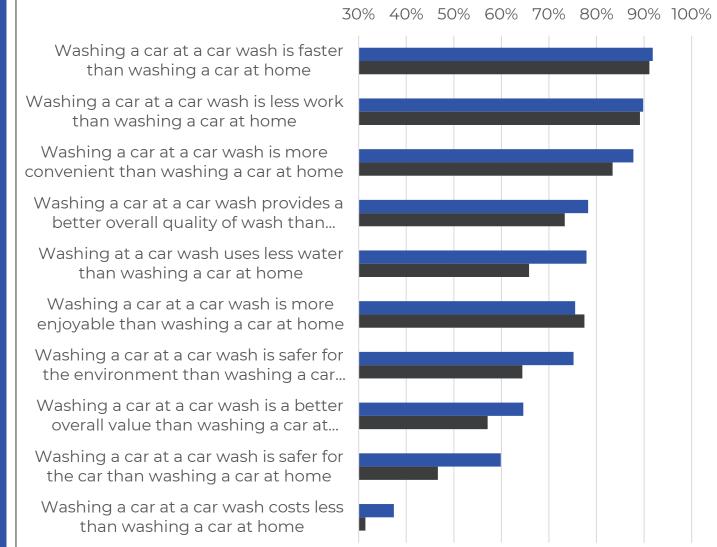
Are less likely to see car washing as an important part of routine maintenance. They are also less likely to use multiple car wash locations.





Light Users 63%

What being a Heavy or Light user means...



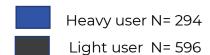
Profile skew

Heavy users:

Are more likely to see car washing at a car wash as more convenient, provides a better finish, uses less water, is better value and is safer for the car than washing at home.

Light Users:

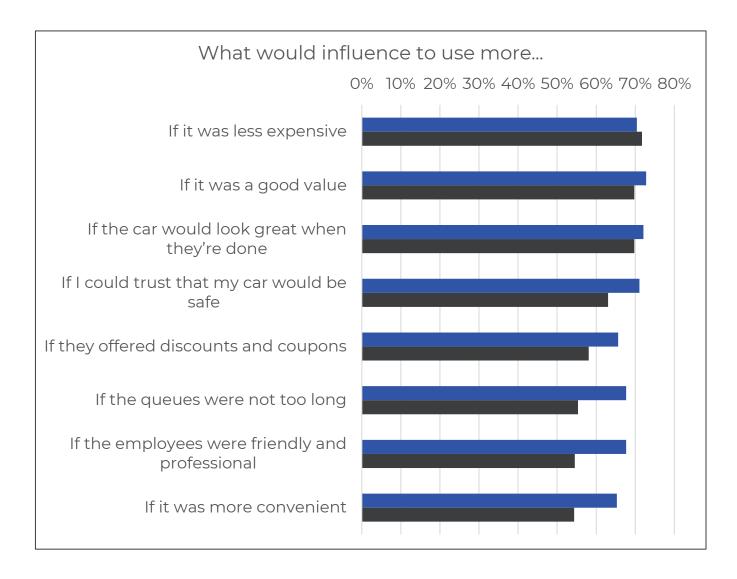
Are more likely to see washing the car at a car wash as more enjoyable than washing from home.





Light Users 63%

What being a Heavy or Light user means...



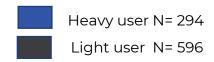
Profile skew

Heavy users:

Are more likely to use the car wash more if they offered discounts and coupons, if the queues weren't too long, if there was friendlier staff and if it was more convenient.

Light Users:

Are more likely to use the car wash more if it was less expensive and provided greater value.





Light Users 63%

Ways to drive more Heavy or Light users

As **heavy users** have higher incomes and drive newer more expensive cars, they seem like easy pickings. However, **they switch** between car wash locations and as users with a higher car wash spend- this is a big risk.

It is important for them to feel loved to maintain loyalty.

There is an opportunity to run a "frequent user" style program, similar to the airlines. With points and status credits. These could allow heavy users to get bonus washes, additional services, priority washing lanes (faster).

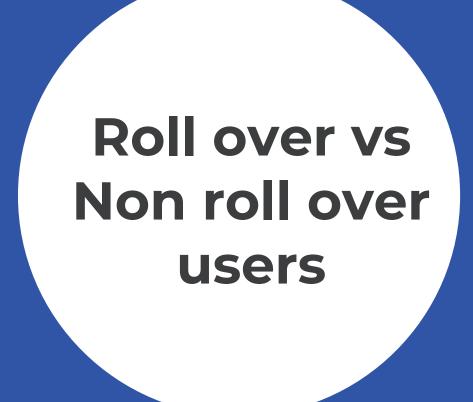
This would keep them loyal to the one car wash.

While **light users** don't seem quite as lucrative, they do make up 63% of car wash users so they are just as important.

It is important for them to feel they are getting a good deal to make them use the car wash more often.

Is there an opportunity to run a less expensive, **off peak model** for these customers? They are less likely to work full time or be retired so off-peak daytime washes could be an option.

Behavioural shift is very important.
The more they use the car wash the more they will feel like they need it. **Moving them from light users to heavy** users could make them more lucrative.



"There is a perception that automatic car washes could damage the car, so they are more likely to be use by consumers with less expensive cars. Is this true?"



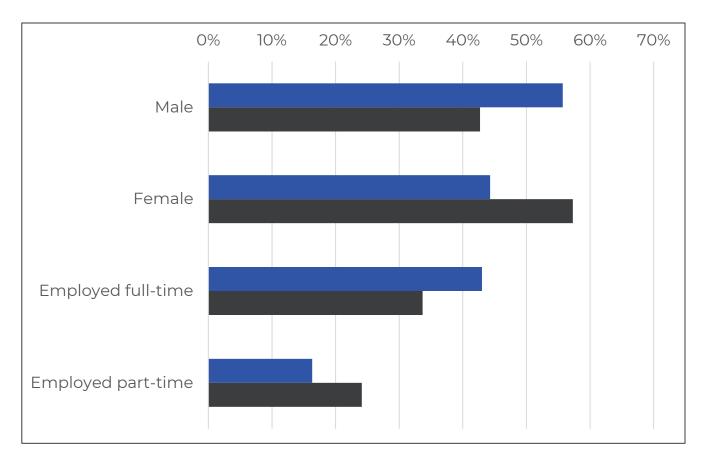
"Use an automatic car wash where the vehicle is stationary, and the machine moves around the vehicle"



"Use all other car wash types"







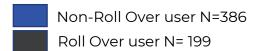
Profile skew

Non-Roll Over Users:

Are significantly more likely to be male and employed full time

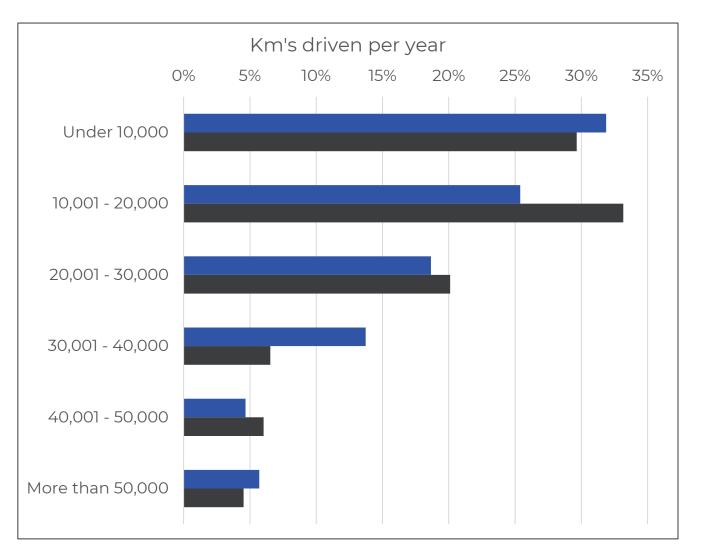
Roll Over Users:

Are significantly more likely to be female and employed part time.









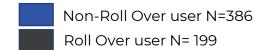
Profile skew

Non-Roll Over Users:

Are significantly more likely to travel over 20,000km per year

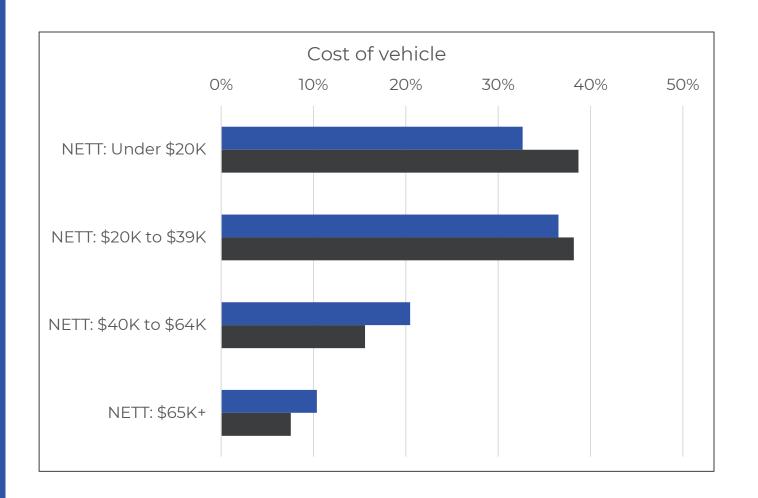
Roll Over Users:

Are significantly more likely to travel under 20,000km per year .









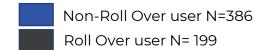
Profile skew

Non-Roll Over Users:

Non roll over users are more likely to have more expensive vehiclesover \$40k

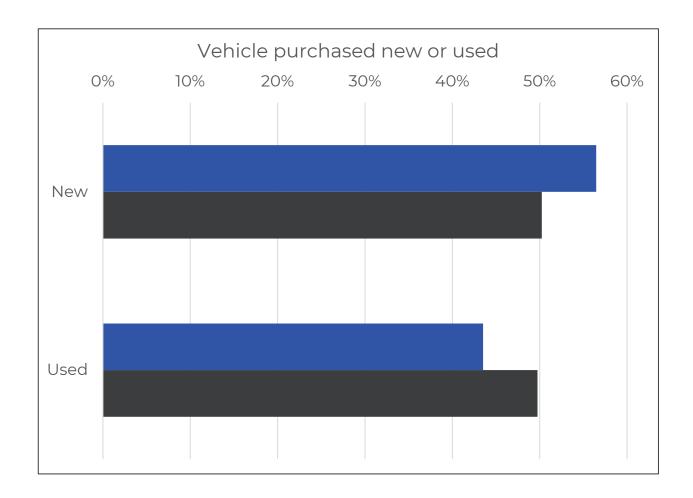
Roll Over Users:

Roll over users are more likely to have less expensive vehicles-Under \$20k









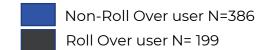
Profile skew

Non-Roll Over Users:

Non roll over users are more likely to have purchased their vehicle new

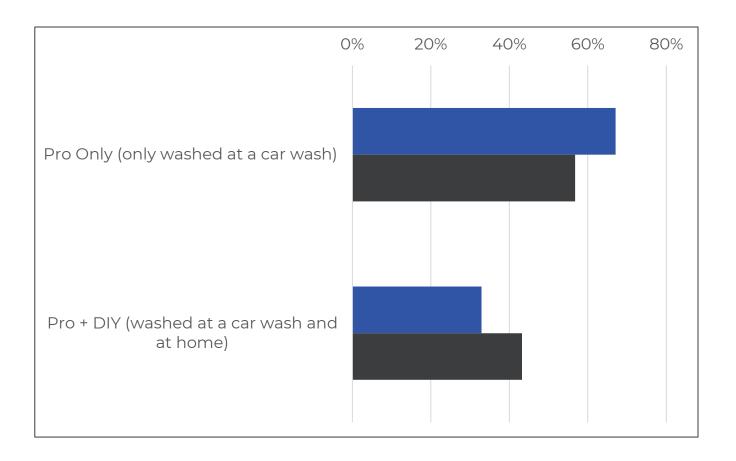
Roll Over Users:

Roll over users are more likely to have purchased their vehicle used.









Profile skew

Non-Roll Over Users:

Non roll over users are more likely to only wash their car at a car wash.

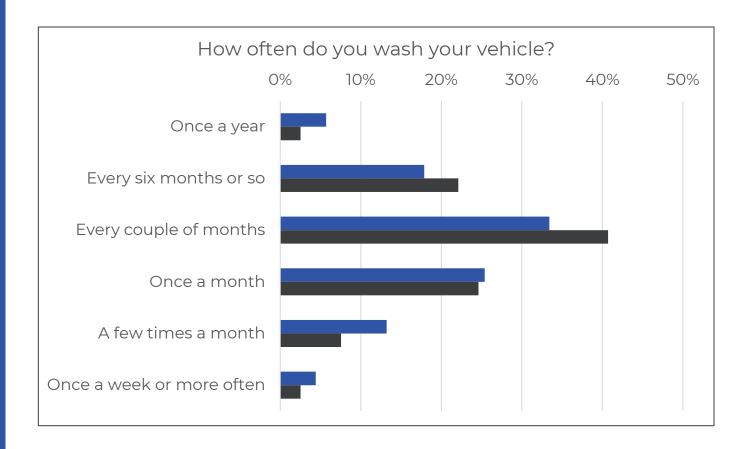
Roll Over Users:

Roll over users are more likely to wash their car at both the car wash and home - maybe due to the cost?









Profile skew

Non-Roll Over Users:

Non roll over users are more likely to wash their car more often- once a month or more

Roll Over Users:

Roll over users are more likely to wash their car every couple of months or less.



Non-Roll Over Users 63%

What being a Roll Over or Non-Roll Over user means...



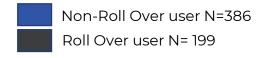
Profile skew

Non-Roll Over Users:

Non roll over users are more likely to think washing their car at a car wash is safer for their car.

Roll Over Users:

Roll over users are less likely to believe washing their car at a car wash is safe for their car.



Roll over includes automatics and touch free



Roll Over vs Non-Roll Over conclusion



There is a thought that people don't trust Roll Over automatics not to damage their cars.

Whilst we didn't ask that directly, we can devise that overall **that sentiment does exist**. Those that use Roll Over automatics, tend to have less expensive cars, bought them second hand and wash their car less often.

From an attitude perspective, those that use automatics, are less likely to agree that their car will be safe when washing at the car wash.

There is opportunity to increase usage of those consumers looking for extra convenience, by reassuring them that their car will be safe if they used a Roll Over.





General Vehicle Questions

Summary General Car Questions

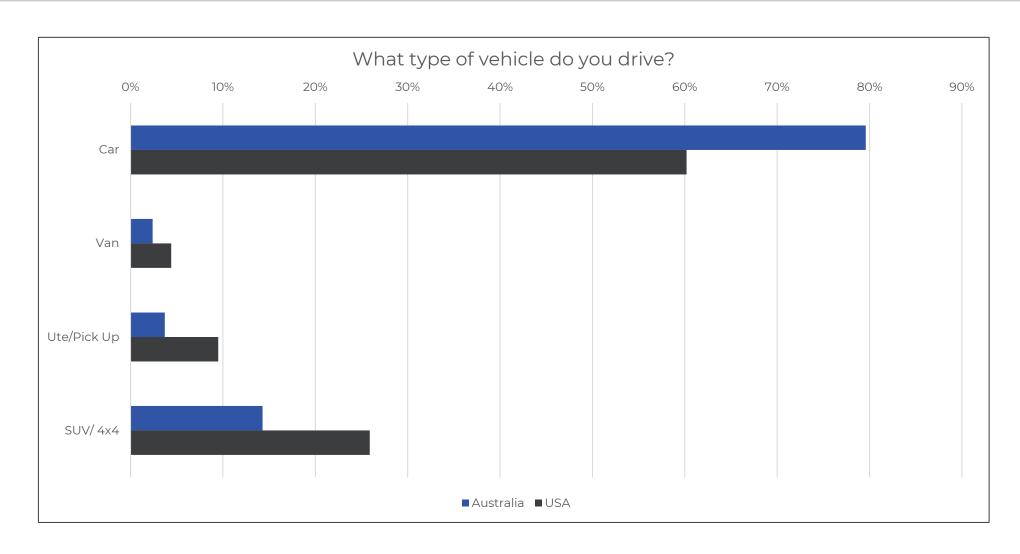
Summary

- 1. In **Australia we are more likely to drive a car** than the USA. While in the USA they are more likely to drive an SUV.
- 2. In **Australia we are more likely to drive a Japanese or Korean** car than the USA. While in the USA they are more likely to drive a luxury car and more obviously a US made vehicle.
- 3. Overall, the **cost of** a consumer's **main vehicle is the same in each market**-however the USA are slightly more likely to have vehicles under \$20k.



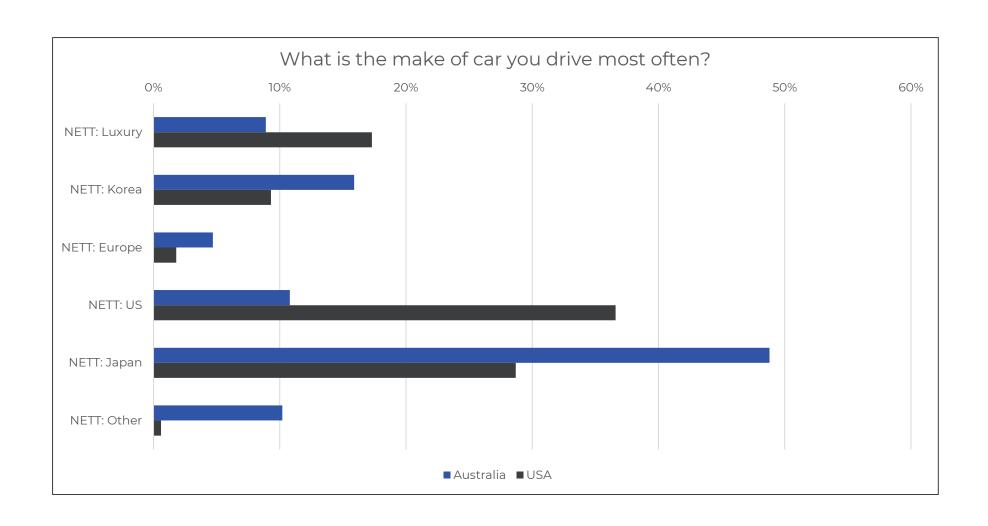


General vehicle questions...



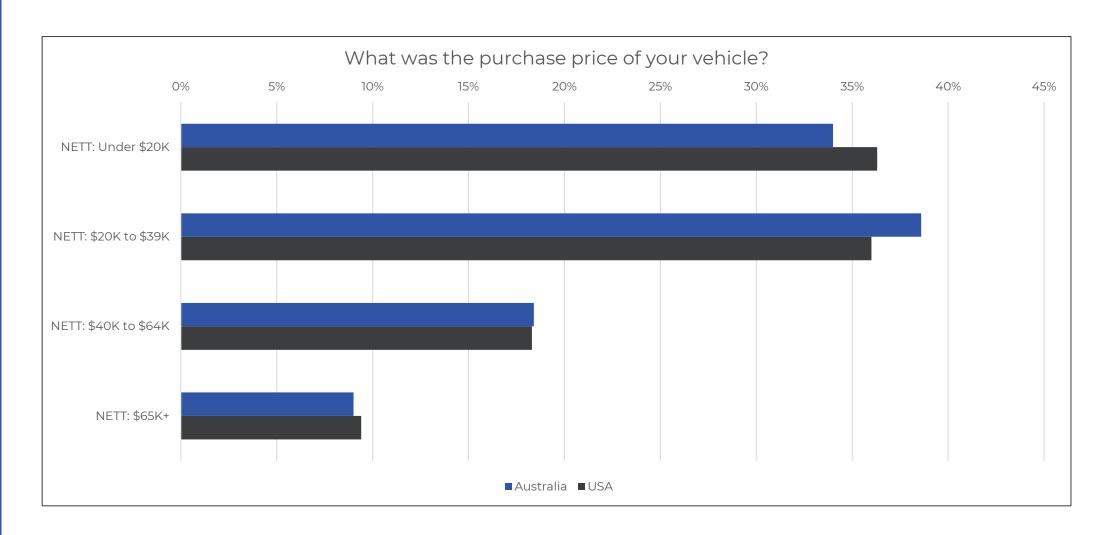


General vehicle questions...





General vehicle questions...



Car Wash Questions

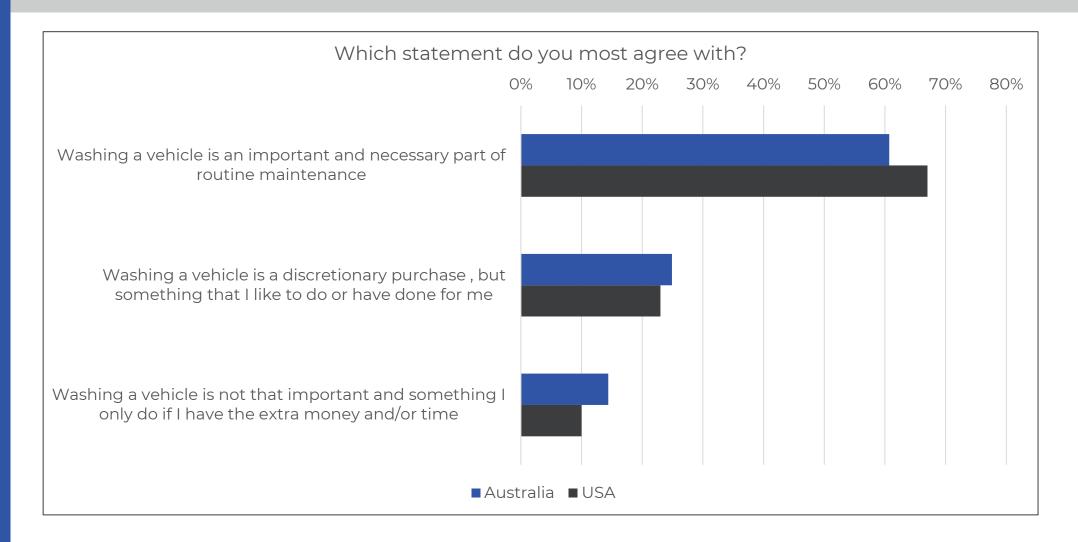
Summary Car Wash Questions

Summary

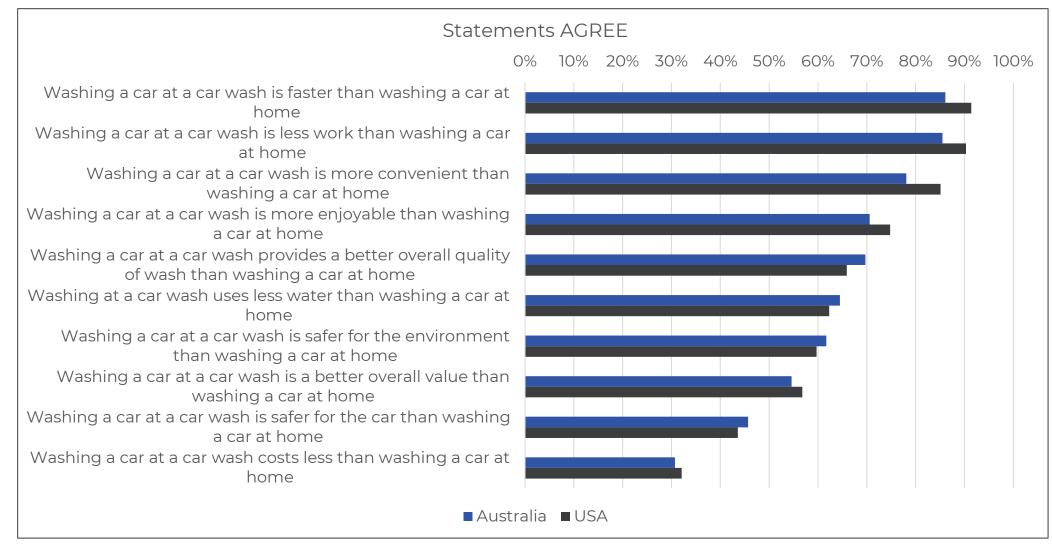
- 1. In Australia we are **slightly less likely** to see washing our vehicle as an important and necessary part of routine maintenance than the USA.
- 2. In the USA they are slightly more likely to see washing their vehicle at a car wash as faster, less work and more convenient than Australia.
- Overall, USA consumers are more positive on all car wash statements than Australia.
- 4. The **USA market are more interested in additional services overall**. This could be cultural as the US market is more attuned to customisation.
- 5. Consumers in **the Australian market pay significantly more per car** wash than the USA market. This is reflected in the satisfaction of price paid per wash.
- 6. The **menu of services isn't as clear in the Australian market** as it is in the USA. An easy opportunity to improve.



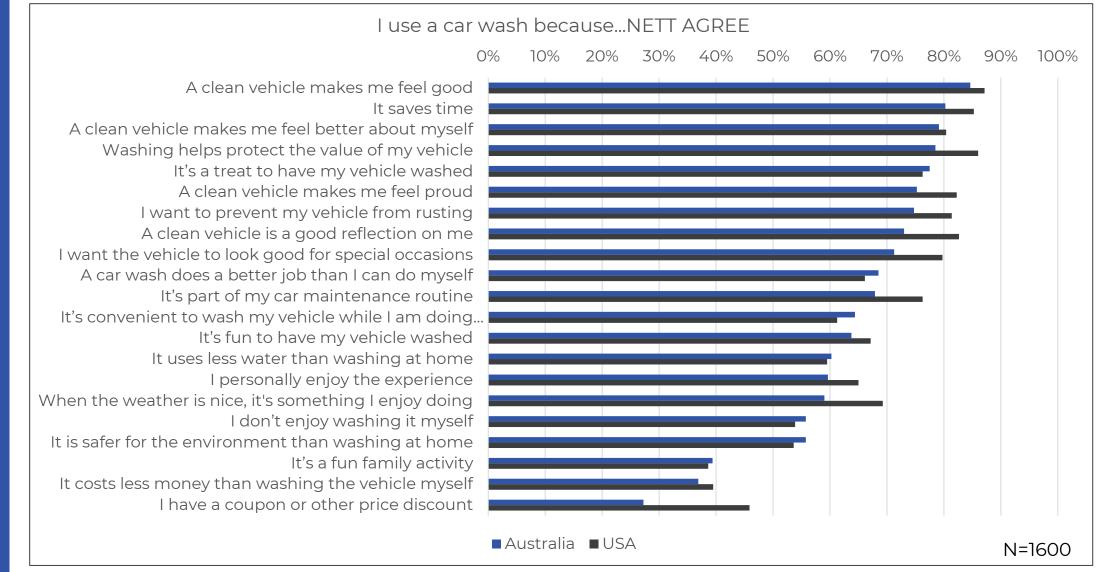




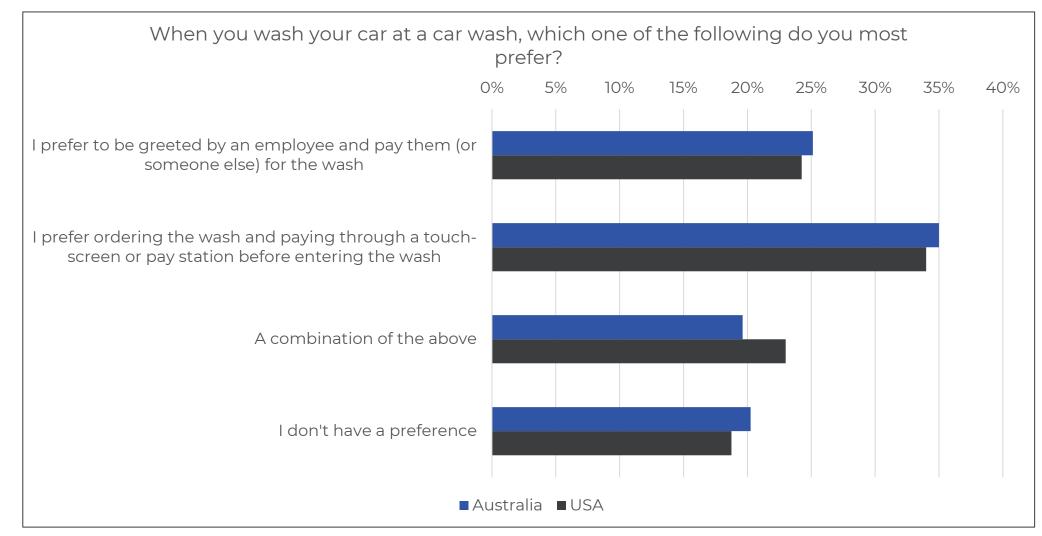




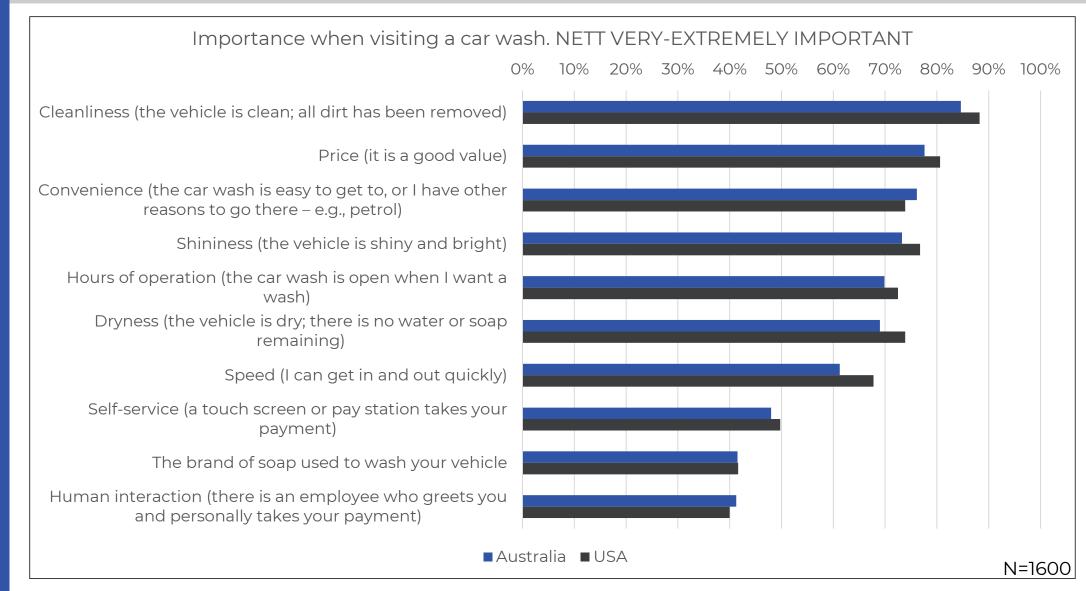




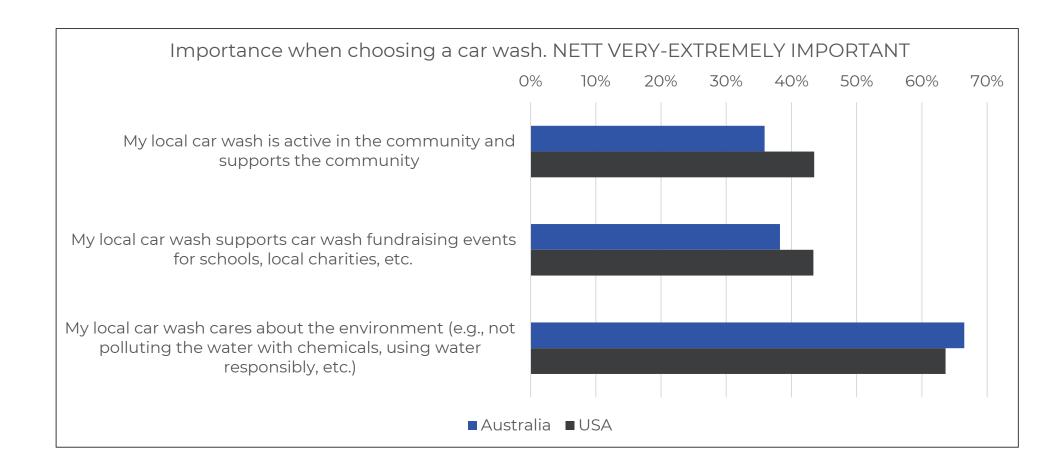




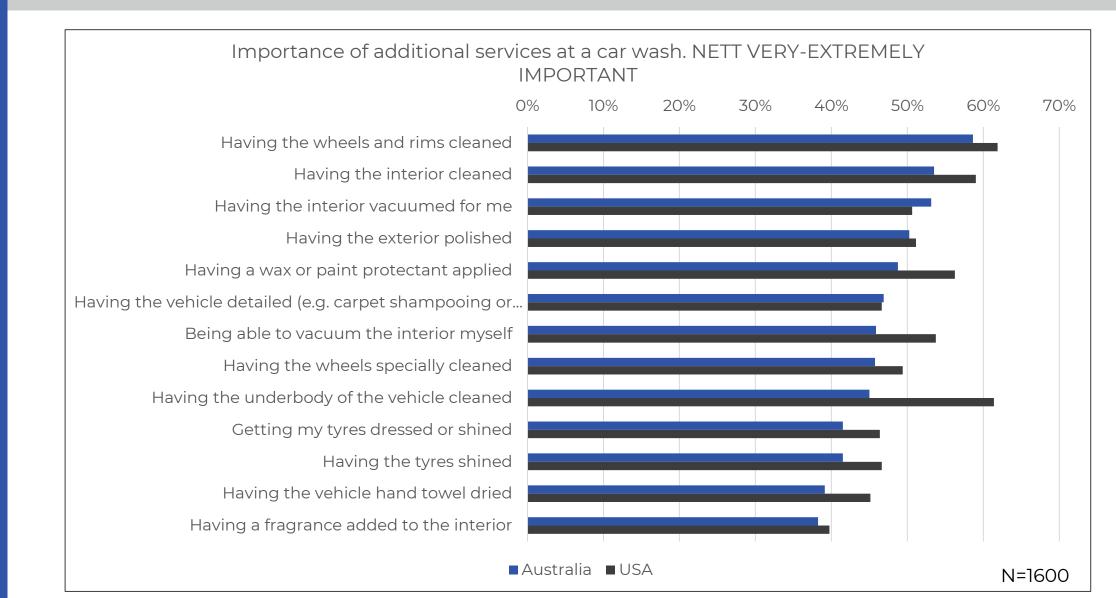




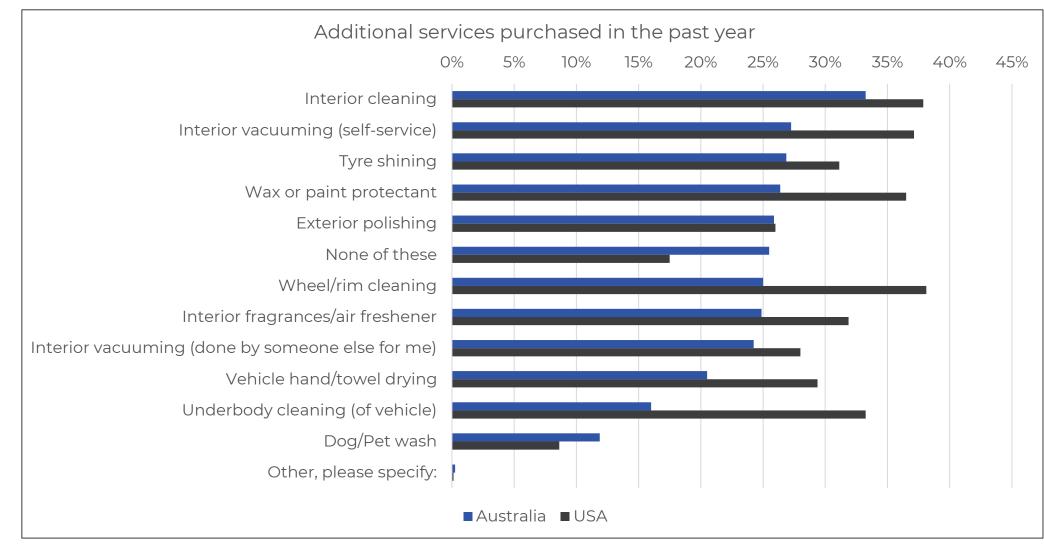






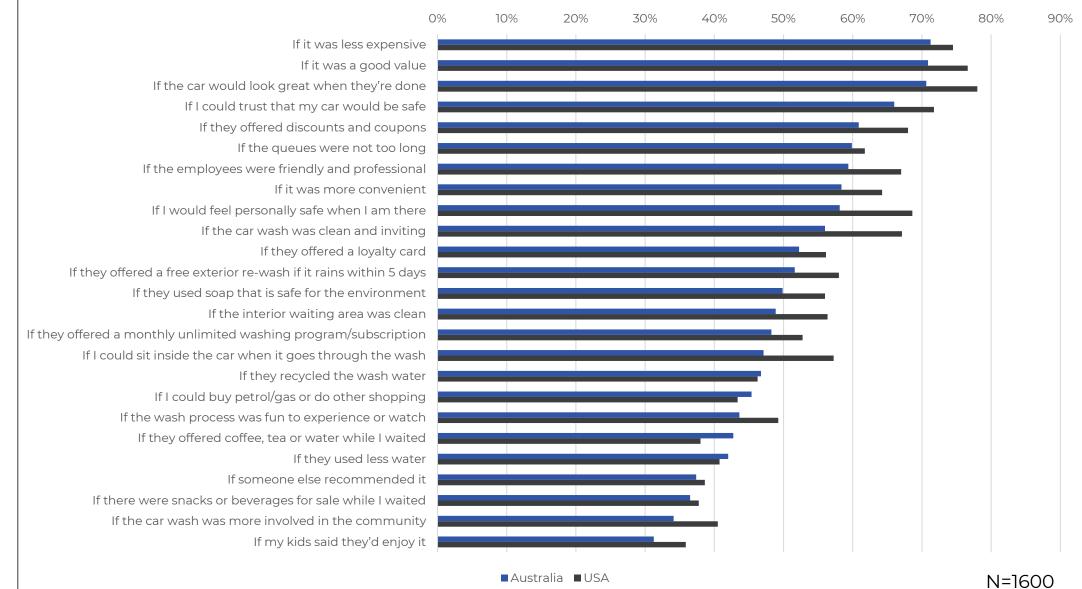




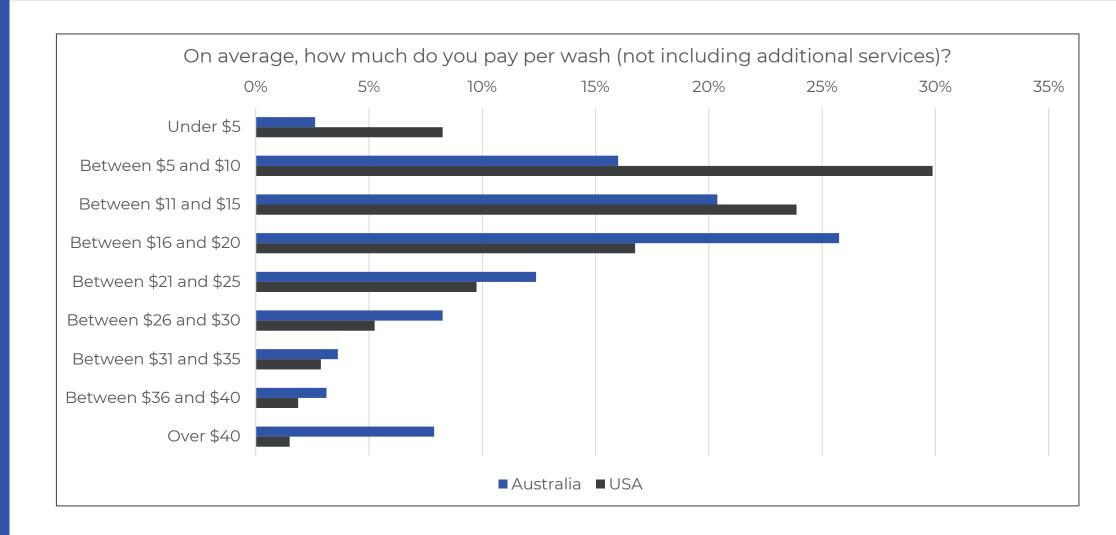








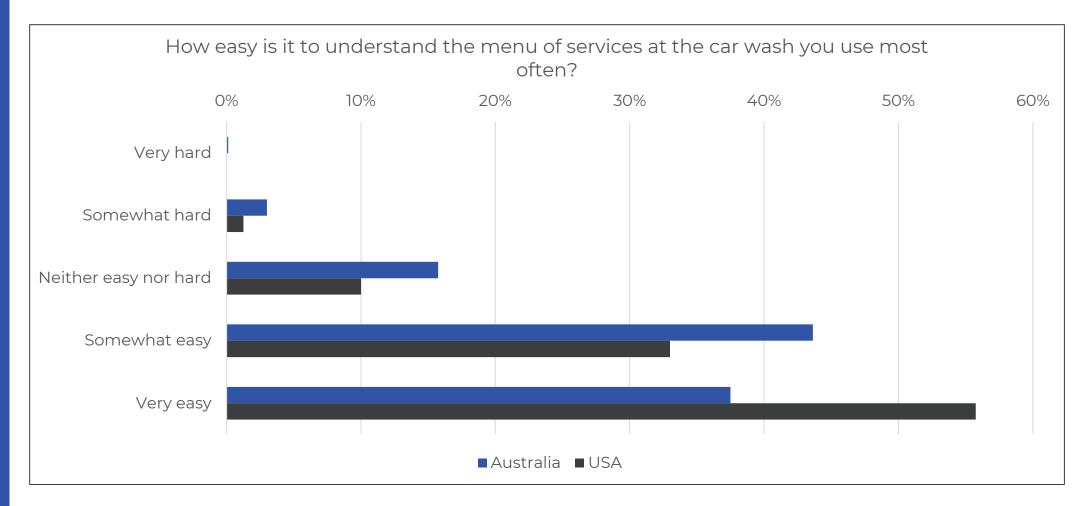




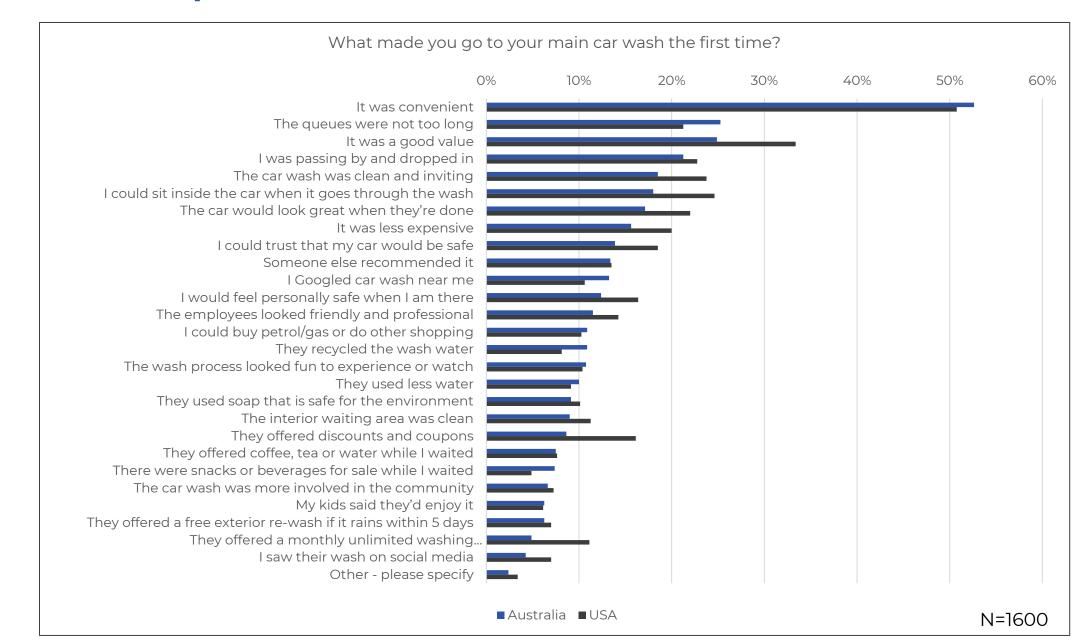




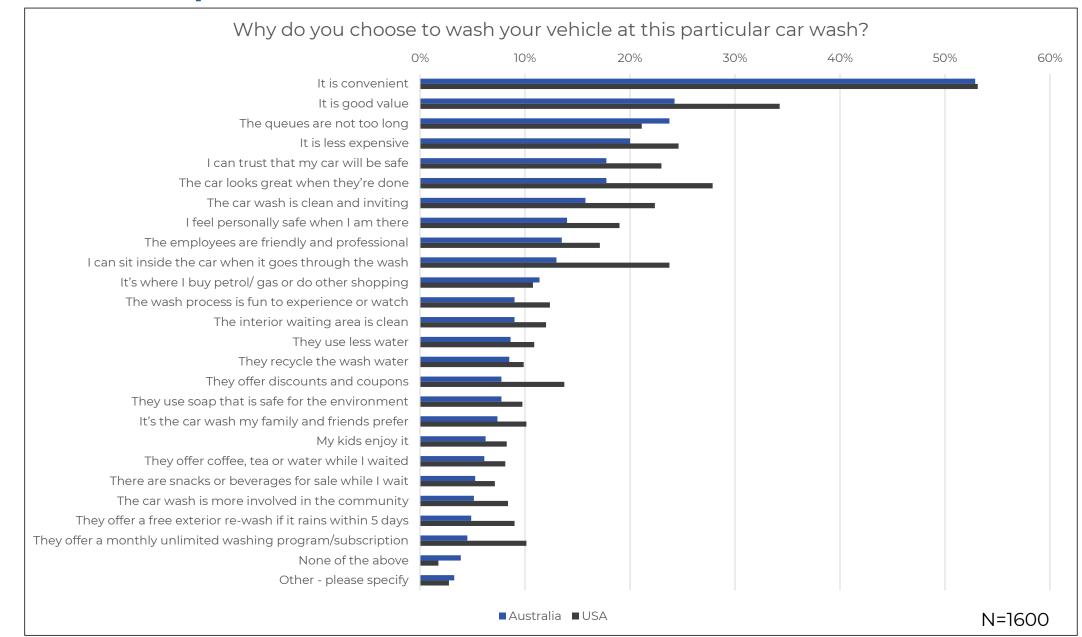




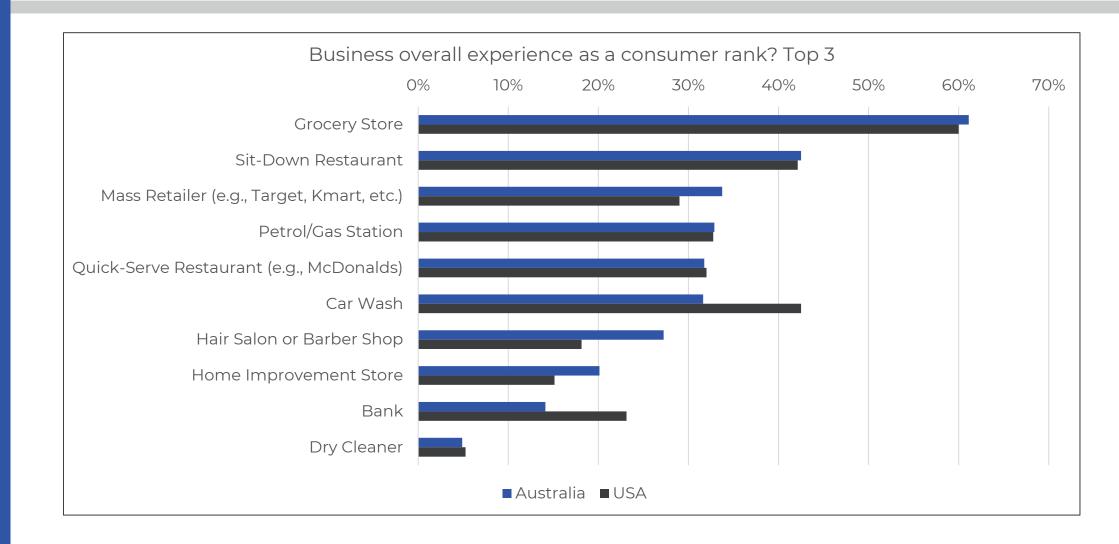












Car Wash
Subscription
Questions

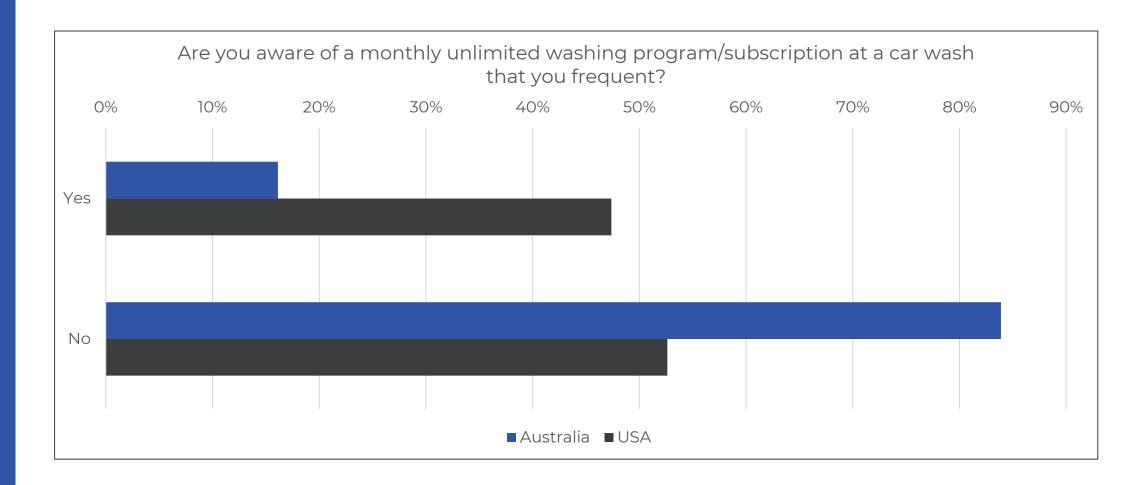
Summary Car Wash Subscription Questions

Summary

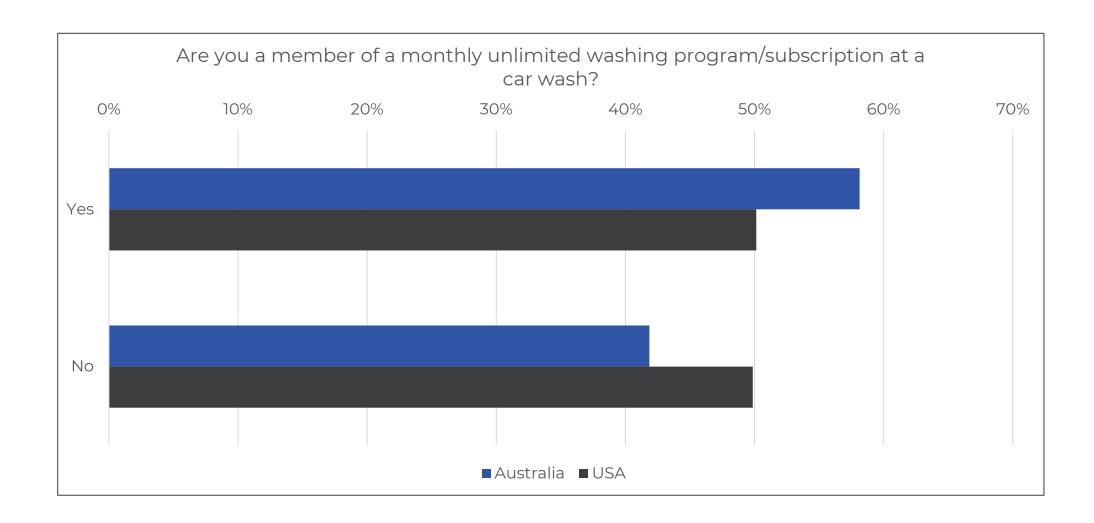
- 1. There is significantly greater awareness of monthly unlimited washing program/subscription programs in the USA.
- However, of those that are aware of these subscriptions, there is a significantly higher % of consumers who subscribe in Australia than the USA.
- There is a big opportunity to get more consumers of monthly unlimited washing program/subscription programs by simply growing awareness. However they also need to see the value.
- 4. Overall, the **USA consumers see all the positives of why they joined** more than Australian consumers.
- **5. USA consumers** on unlimited car wash programs **use the service far more** than Australian consumers- this would reflect their positive sentiment.
- 6. Australian consumers tend to be more seasonal in their uptake.



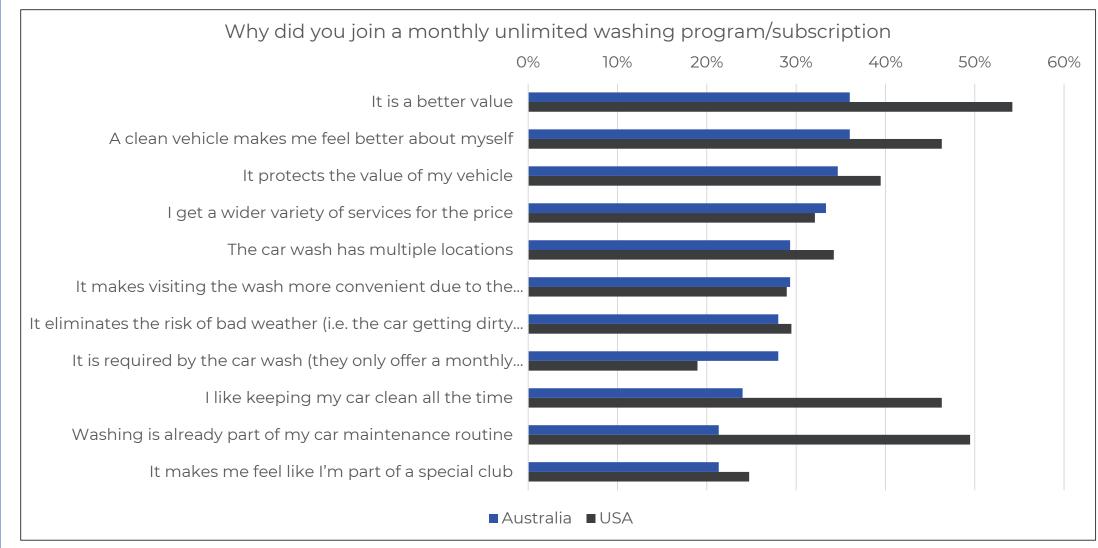








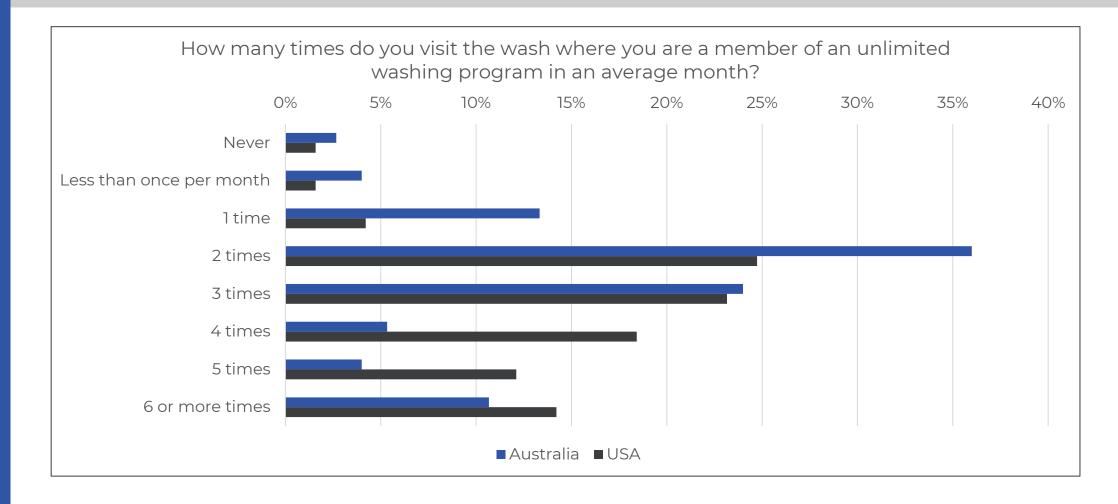




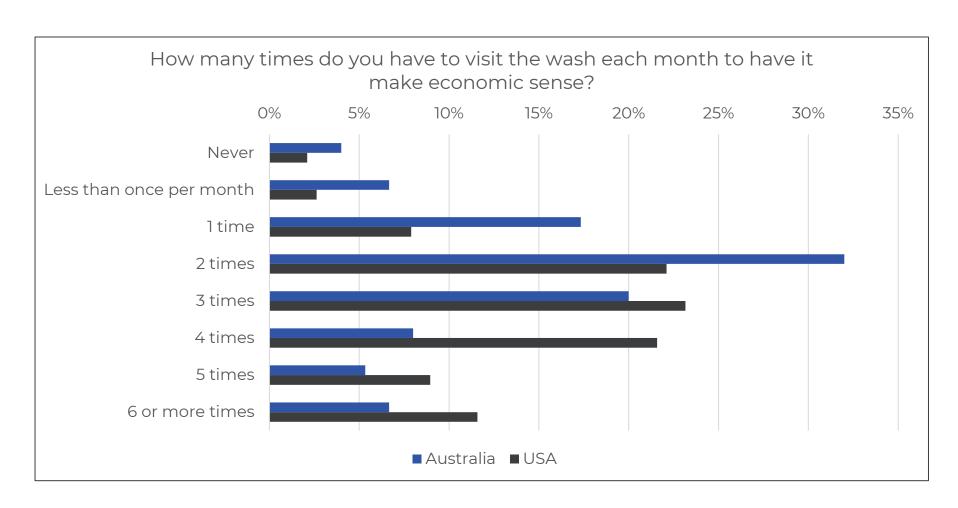




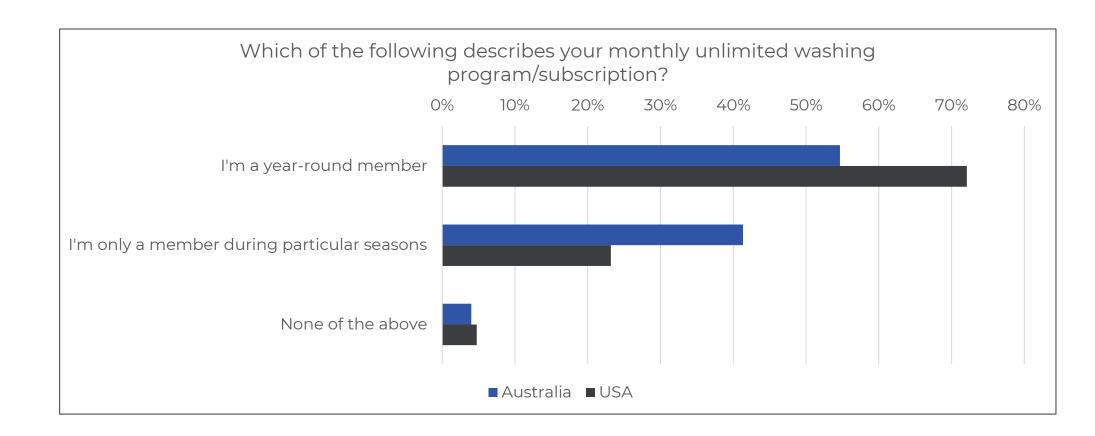












Washing Car At Home Questions

Summary Washing Car At Home Questions

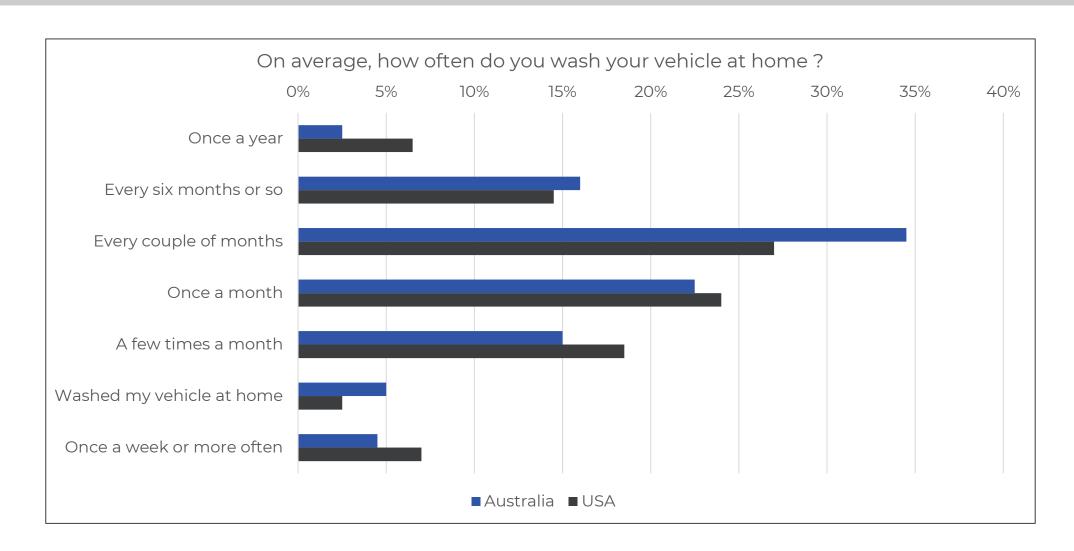
Summary

- 1. Australians who wash their car at home are **more likely to do it every couple** of months.
- 2. The main reasons for washing at home are it costs less, they enjoy it, uses less water and it's part of their routine.
- 3. A big concern for those that wash their vehicle at home is that the vehicle could be damaged by the car wash or their car won't be safe.



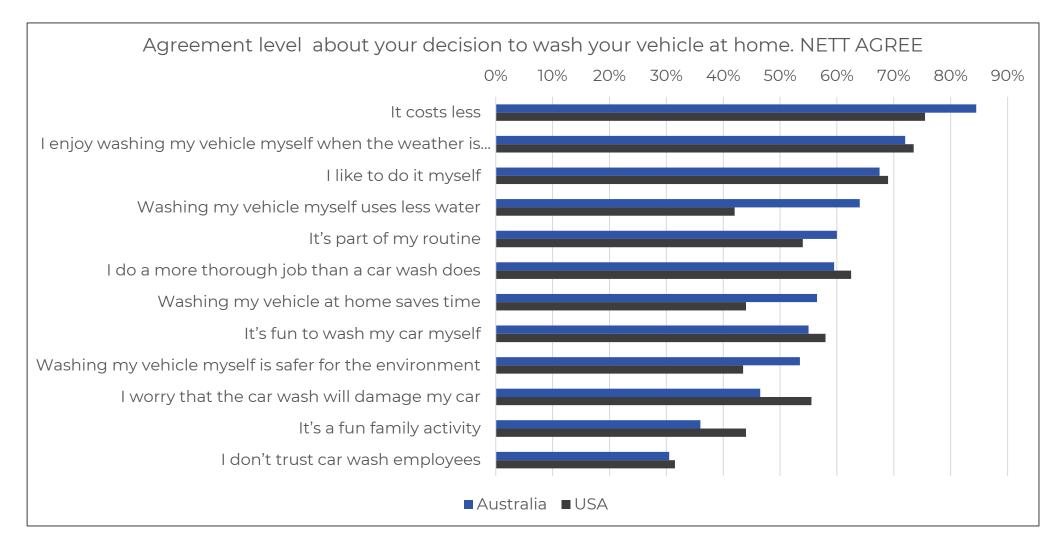


Car washing at home questions...



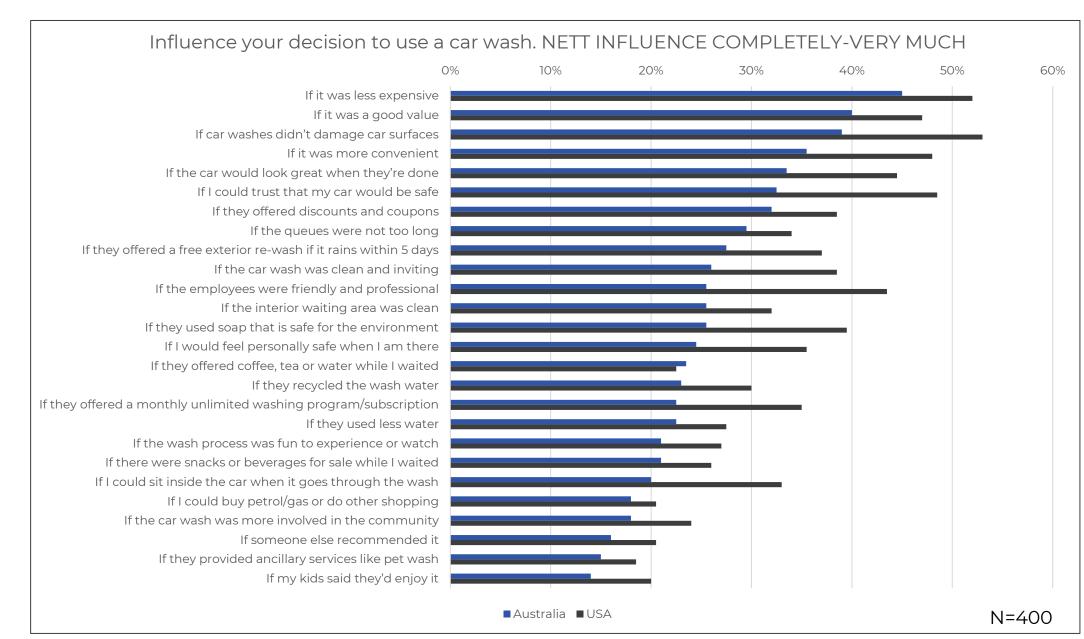


Car washing at home questions...





Car washing at home questions...



Car Safety
Feature
Questions

Summary Safety Feature Questions

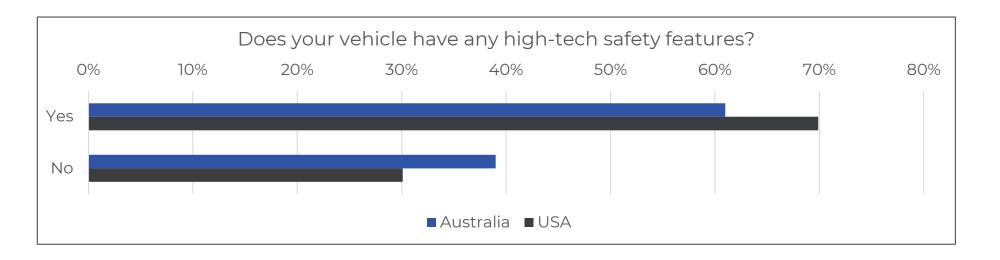
Summary

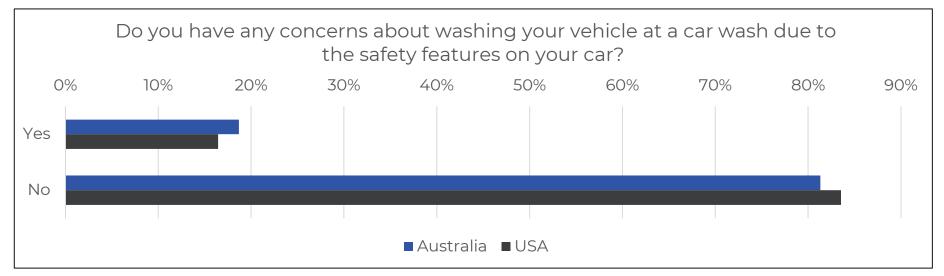
- Australians who have high tech safety features, less than 20% say they have concerns about washing their car at a car wash.
- 2. Less than 10% are less likely to wash their vehicle at a car wash due to safety features- Whilst a smallish number there is still opportunity to overcome this issue with reassurance.





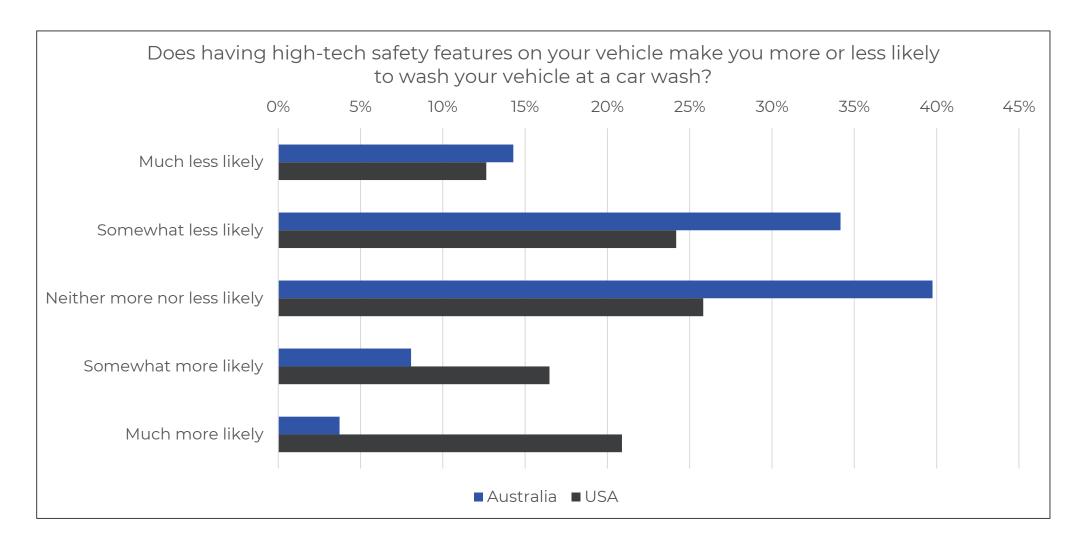
Safety feature questions...

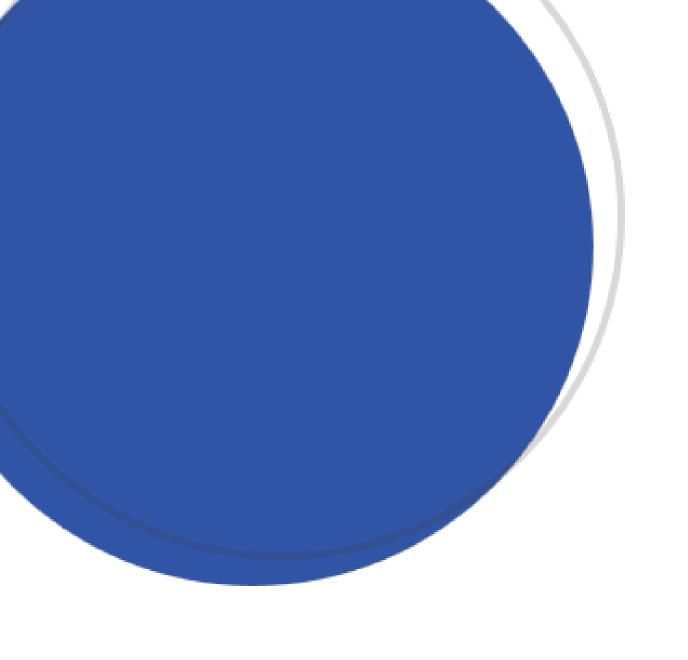






Safety feature questions...





Thank you

Alastair Liptrot

