

# Customer Loyalty

Going beyond the car wash



**CAR WASH**  
SHOW EUROPE

21 & 22 SEPTEMBER 2023 • AMSTERDAM

# Who's Anne?



**Anne Mauler**

Likes: Marketing Innovation

- ✓ Innovator digital and experiential media
- ✓ High-volume, high-growth concepts
- ✓ Married, 3 kids, foodie

Who's  
Soapy?





## Who is Soapy Joe's?

Soapy Joe's

- Express exterior
- 20 in San Diego, CA
- Locally-owned, family-run
- Rapid growth





### Membership benefits:



Save time  
& money



Unlimited  
washes



Fast-Pass  
Entry



Access to  
all locations



# WHAT OTHER CAR WASHES SEE

**SOAPY JOE**  
Likes: Good Clean Fun

- Loves To Learn
- Building Communities
- Saving Water
- Bubbles
- Vacuuming

SAN DIEGO SPRINGS OCEANSIDE

WELCOME TO SAN DIEGO  
Building Community

SOAPY JOE'S  
1440 Broadway Ave, San Diego, CA  
Ten thousand dollars and no Soapy Joe's

05/04/21  
\$10,000.00  
dollars  
Soapy Joe's

SOAPY JOE'S

race cure  
SAN DIEGO

# Tech-based, best-in-class operator



# Customer Loyalty

Today's Market



# Loyalty: more than a transaction

Ten years ago,  
membership companies  
were limited.

Today, they are  
commonplace across  
multiple industries,  
including car washes.



## Local market

Population growth

Income trends on an overall  
and per capita basis

Car ownership trends

Weather trends

Housing & parking trends

Net new businesses  
entering your market

## Car wash industry

Subscription revenue with  
high margins and cash flow

Retail investors seeking growth  
opportunities – M&A activity

Highly fragmented marketplace

Favorable environmental posture

Favorable consumer behavior

Resilient performance  
through downturns



# Loyalty: more than a transaction

Sale



Price



Features



Convenience

Relationship



Feeling



Shared Values



Belonging



# Loyalty: relationship strategy

Experience

Dedicated representatives to ensure the best experience



Community

Regular events that bring the community together



Emotion

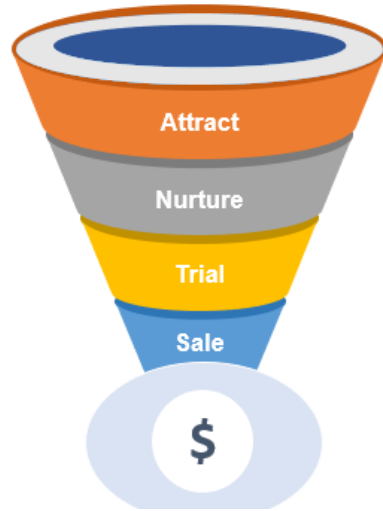
Veterans Day events that show appreciation and give back



# Customer Loyalty

Sales Funnel Evolution

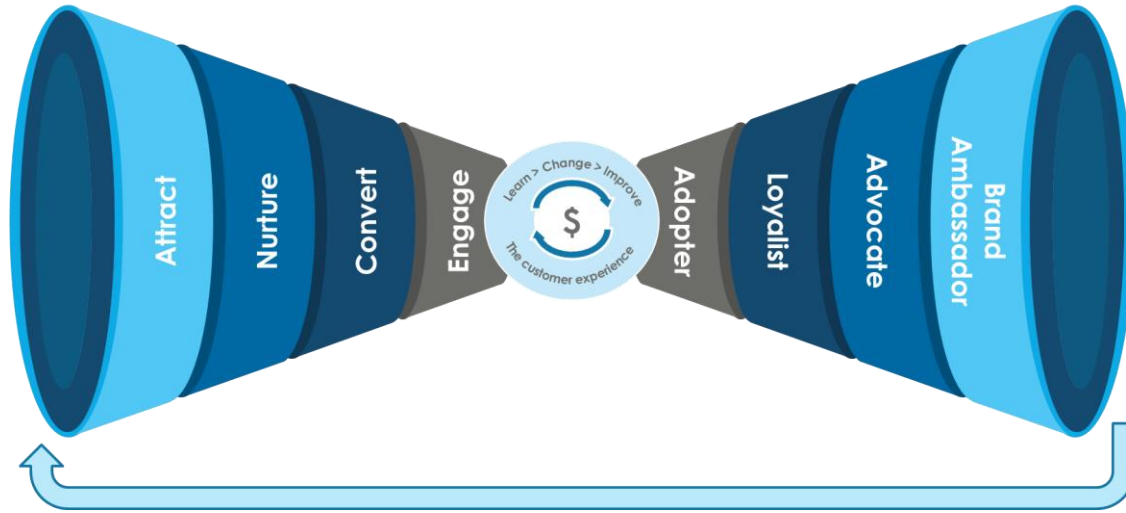
# Sales funnel: the classic



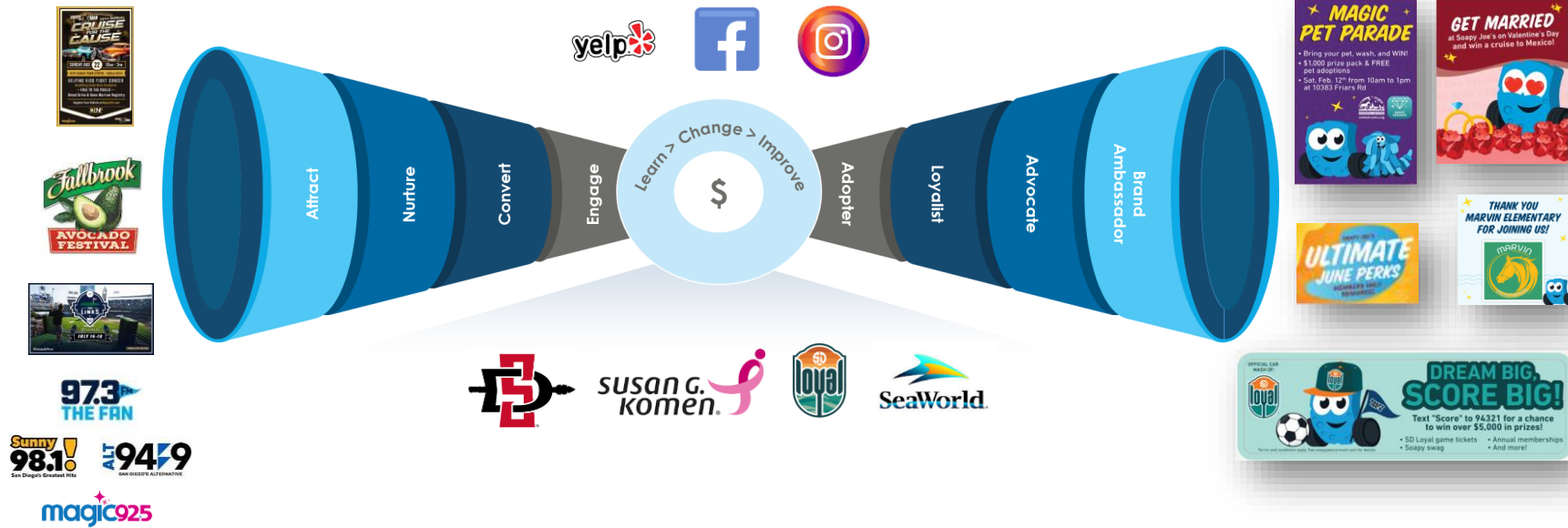
# Sales funnel: new bowtie model

MARKETING STRATEGY

Bowtie Funnel



# Soapy Joe's funnel: tactical support

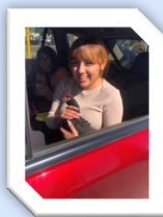
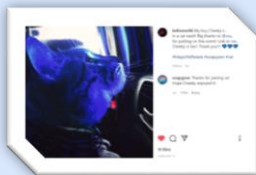




# Emotion Drives Plans

Magic Ceramic  
product launch

## Magic Pet Parade 2022



## SURVEY INSIGHTS

- 45% have kids living at home
- 65% have pets

Action → pet-focused promo

- 65% want wash upgrades
- Action → include free ceramic upgrades for members

## RESULTS

- 460% MOM Engagement
- 7.7K votes
- 16.8K website visits
- 24% of pageviews in month

# Feedback

## Always on



### **Feedback & Reporting Cadence**

#### **Daily** ✨

*CX CSAT surveys via phone, email  
Review alerts  
Social listening*

#### **Weekly**

*CX CSAT report  
Review topical report*

#### **Monthly**

*Social platform report  
Review roll-ups  
CX CSAT and SLA report*

#### **Quarterly** ✨

*Cancelled member survey*

#### **Annually**

✨ *Member survey*

#### **Ad Hoc**

*Price sensitivity study  
Technology preferences*

### **SURVEY INSIGHTS**

- Purchase motivations
- Feature preferences
- Demographic data
- Voluntary churn motivations
- Customer satisfaction levels

### **CX DATA**

- Friction in Customer Journey

### **IMPLEMENTING**

- Weekly synch with Ops leadership
- Monthly manager meetings
- Optimize real-time
- MIT curriculum applications



How did you first hear about Soapy Joe's?

Answered: 5,052 Skipped: 2,733

| ANSWER CHOICES                         | RESPONSES |
|--|-----------|
| Friends, family members, or colleagues | 45%       |
| I don't remember                       | 36%       |
| Mailed advertisement received at home  | 4%        |
| Social media                           | 4%        |
| Online search results                  | 3%        |
| Billboards                             | 3%        |
| Coupons                                | 1%        |
| At a community event                   | 1%        |

# Referral Rates

*SJ vs. National*

**3x**  
*Referrals*

**Sample Size**

Soapy Joe's n=5,052

ICA n= 1499



How did you first learn about the car wash you use most often?

|  | Total U.S. |
|--|------------|
| Total PRO  | N=1499     |
| Advertising (TV, radio, newspaper, billboard, online ad, etc.) | 9%         |
| Social media (Facebook, Instagram, Twitter, etc.)              | 12%        |
| Email from the car wash  | 4%         |
| I drove by the car wash  | 77%        |
| Referral by a friend   | 15%        |
| Word of mouth  | 16%        |
| They were involved in the community                            | 5%         |



| ANSWER CHOICES  | RESPONSES       |
|---|-----------------|
| Having a clean car gives me a positive feeling                                      | 78% 1,160       |
| My car is a reflection of me  | 52% 766         |
| I'm required for work to have a clean car   | 5% 70           |
| Financially, I want to protect my investment  | 31% 464         |
| I want to be environmentally responsible in my choices, including how I wash my car | 20% 300         |
| I have a functional or practical need to wash (park outside, have a pet, have kids) | 26% 379         |
| I do preventative care because bird droppings or acid rain can damage my car        | 29% 435         |
| Other (please specify)  | Responses 3% 44 |
| Total Respondents: 1,484  |                 |

# Motivated by Feeling

SJ vs. National

# +43%

# Positive Feeling

## Sample Size

Soapy Joe's n=1,484

ICA n= 1499



| % Agree Strongly                                      | Total U.S. |
|---|------------|
| Total PRO   | N=1499     |
| A clean vehicle makes me feel good                    | 53%        |
| I want to prevent my vehicle from rusting             | 50%        |
| Washing helps protect the value of my vehicle         | 49%        |
| A clean vehicle makes me feel proud                   | 47%        |
| A clean vehicle makes me feel better about myself     | 46%        |
| A clean vehicle is a good reflection on me            | 45%        |
| I want the vehicle to look good for special occasions | 43%        |
| It saves time   | 43%        |
| A car wash does a better job than I can do myself     | 41%        |
| It's part of my vehicle maintenance routine           | 41%        |





|                             | VERY SATISFIED | SOMEWHAT SATISFIED |
|-----------------------------|----------------|--------------------|
| Uniforms are clean and tidy | 64%<br>970     | 15%<br>233         |
| Available to speak Spanish  | 22%<br>323     | 5%<br>76           |
| Politeness                  | 62%<br>934     | 19%<br>285         |
| Knowledgeable               | 50%<br>759     | 18%<br>273         |
| Professional                | 57%<br>859     | 20%<br>308         |
| Approachable                | 59%<br>882     | 18%<br>276         |
| Helpful                     | 57%<br>860     | 19%<br>294         |

# Employees Shine

*SJ vs. National*  
**+20 pts**  
*Polite*  
*Helpful*  
*Pros*

**Sample Size**  
 Soapy Joe's n=1,484  
 ICA n= 1499



Which of the following words describe the employees at the car wash

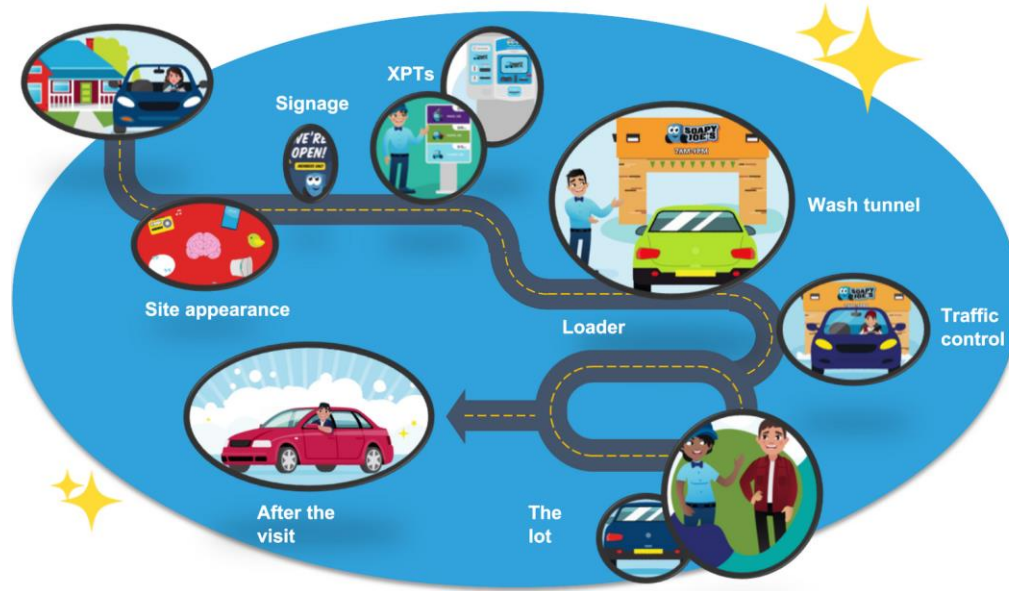
|                       | Total U.S. |
|-----------------------|------------|
| Total PRO             | N=1499     |
| Friendly              | 49%        |
| Polite                | 41%        |
| Nice                  | 38%        |
| Helpful               | 37%        |
| Courteous             | 36%        |
| Professional          | 35%        |
| Treat me with respect | 31%        |
| Well-trained          | 27%        |
| Kind                  | 27%        |

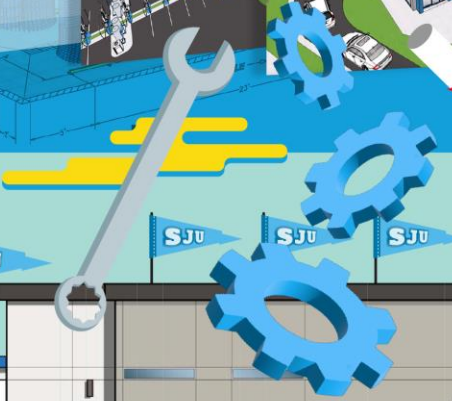


# Customer Loyalty

Customer Journey Map

# Customer Journey Map







# Touchpoints

## Site Appearance



First impressions are made within the first minute. Wait times, staff appearance and zoning, and cleanliness matter.

## Signage



Ensure that all signage and branding are consistent and professional.

## Pay Stations



XPTs should always have an **attendant available** to answer questions.



# Touchpoints

Loader



Positive body language and consistent hand gestures are crucial at this touchpoint.

Tunnel



Thorough maintenance checks help prevent wash quality concerns and/or damage caused in the tunnel.

Traffic Control

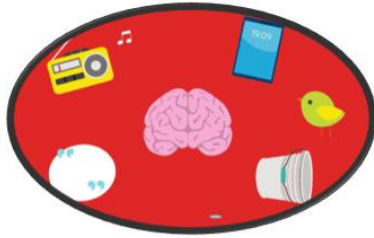


Managing traffic during peak hours help members to feel they are getting the full value of their membership.



# Touchpoints

## The Lot



Cleanliness, vacuum suction, garbage, music are practical to monitor. **Say "Hi" to your members!**

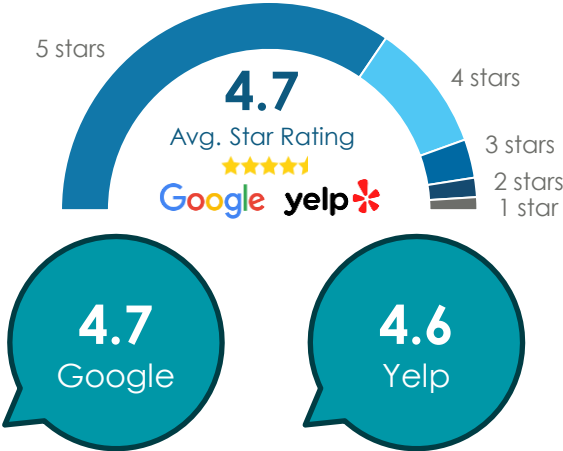
## Post-Visit



Member Services, our website and social media all keep our customers engaged with the brand after the visit.



# Soapy Joe's Customer Ratings



# RECAP

- As a membership company, retaining our members is just as important as selling to them to fuel our growth
- Keeping our members happy throughout their experience can lead to referrals
- Every touchpoint is crucial for the member's experience, from their first impression





**Follow us on social media!**

