

Results From The *Auto Laundry News*

2016 Detail Survey

The 2016 *Auto Laundry News* Detailing Survey was conducted through a mailing of questionnaires to a random selection of subscribers who provide detailing services at their car care businesses. The information contained in this report results from an analysis of data provided by respondents from across the United States.

RESPONDENT POOL PROFILE

For comparative purposes, respondents are, on

occasion, separated into three main categories: freestanding detailing shops (Freestanding), detail shops run in conjunction with a car wash (Car Wash Combo), and mobile detail services (Mobile Services). A fourth category, detail shops run in conjunction with a business other than a car wash (Other Combo), such as a gas station, fast lube, etc., is employed when relevant. Compared to the previous two years, the categories break down with remarkable consistency:

Detailer Type	2016	2015	2014
Freestanding	44%	44%	45%
Car Wash Combo	37%	37%	38%
Mobile Services	12%	13%	12%
Other Combo	7%	6%	5%

PERFORMANCE

At 45 percent, the proportion of respondents reporting improvement in their business over the previous year has declined for the second year in a row. Last year 56 percent of respondents reported advances, while 58 percent did so the year before that. In the current survey, 16 percent experienced reversals in business compared to 9 percent who reported backpedalling the previous year. Mobile Services put in the best performance with 80 percent of respondents in this category reporting improvement compared to 37 percent of Freestanding shops and 43 percent of Car Wash Combos.

MEMBERSHIPS

Detailers are not joiners. Car Wash Combos are more than three times as likely to be members of a trade association than are Freestanding shops — 38 percent compared to 11 percent. Twenty percent of Mobile Service operators are trade association members. Chambers of Commerce do a little better at recruiting among Freestanding shops, 26 percent of which are members. Comparative figures for Car Wash Combos and Mobile Services are 31 percent and 40 percent, respectively.

FUTURE PLANS

Overall, as was the case two years ago, 15 percent of respondents plan on expanding their car care businesses during the next 12 months. Detailers are sticking to detailing, while Car Wash Combos are looking to both full-serve and exterior-only wash operations. 🚗

PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	14	27	37	22
Mountain	25	20	45	10
Midwest	19	27	31	23
Central	13	34	29	24
South Central	19	22	34	25
Southeast	17	28	27	28
Mid-Atlantic	14	34	28	24
New England	5	25	50	20

KEY

Pacific

Alaska-California-Hawaii-Oregon-Washington

Mountain

Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming

Midwest

Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota

Central

Illinois-Indiana-Michigan-Ohio-Wisconsin

South Central

Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

Southeast

Delaware-Florida-Georgia-Maryland-Carolinas-Virginia-West Virginia

Mid-Atlantic

New Jersey-New York-Pennsylvania

New England

Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont

INCOME COMPARED TO LAST YEAR

45%

2015 INCOME MORE THAN IN 2014

39%

2015 INCOME SAME AS IN 2014

16%

2015 INCOME LESS THAN IN 2014

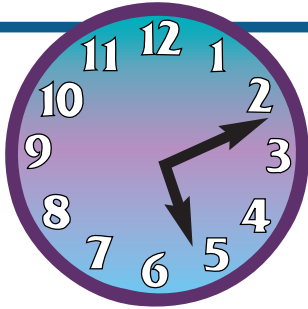
OPERATOR PROFILE

Freestanding Detail Shop	44%
Mobile Detailing	12%
Full-Service Conveyor Car Wash	28%
Exterior-Only Car Wash	2%
Self-Serve Car Wash	7%
In-Bay Automatic	7%
Oil Change/Lube	5%
Gas Station	9%
C-Store	5%

SURVEY

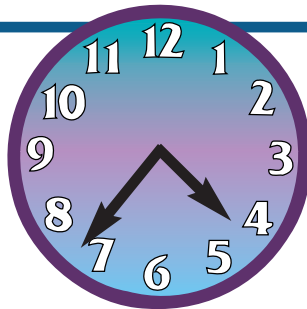
AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE

FREESTANDING



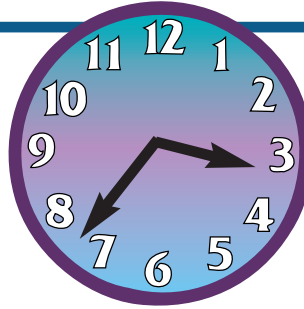
5.2 HOURS

CAR WASH COMBO



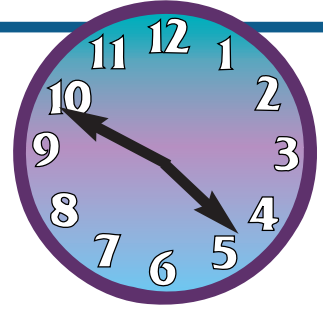
4.6 HOURS

MOBILE SERVICES



3.6 HOURS

OTHER COMBO



4.8 HOURS

DETAIL SERVICE PRICES

CHARGE FROM A FIXED-PRICE MENU

32%

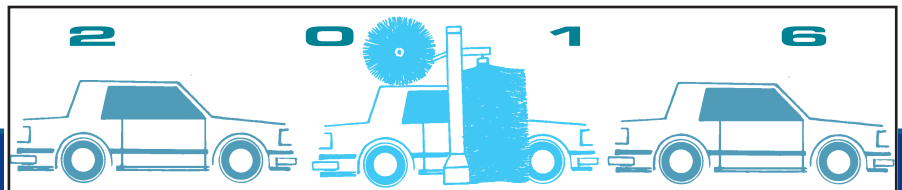
CHARGE ACCORDING TO PER-CAR ESTIMATE

57%

USE BOTH METHODS

11%

AVERAGE NUMBER OF CARS DETAILED ANNUALLY



FREESTANDING

1,310

CAR WASH COMBO

1,157

MOBILE SERVICE

1,560

EMPLOYEE UNIFORMS

FULL 3%

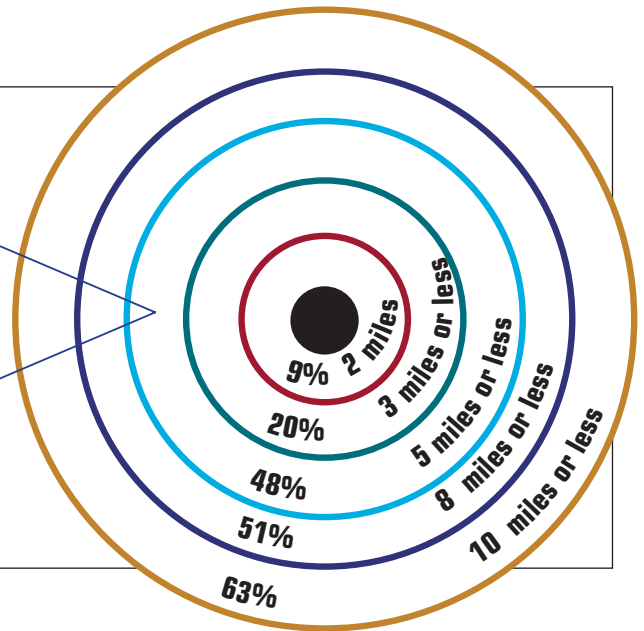
PARTIAL 74%

NONE 23%

COMPETING DETAIL SHOPS IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	6%
1	9%
2	20%
3	32%
4	12%
5	15%
MORE THAN 5	6%

HOW FAR DO CUSTOMERS COME?
 (% from within 2-mile radius, 3-mile radius, etc.)



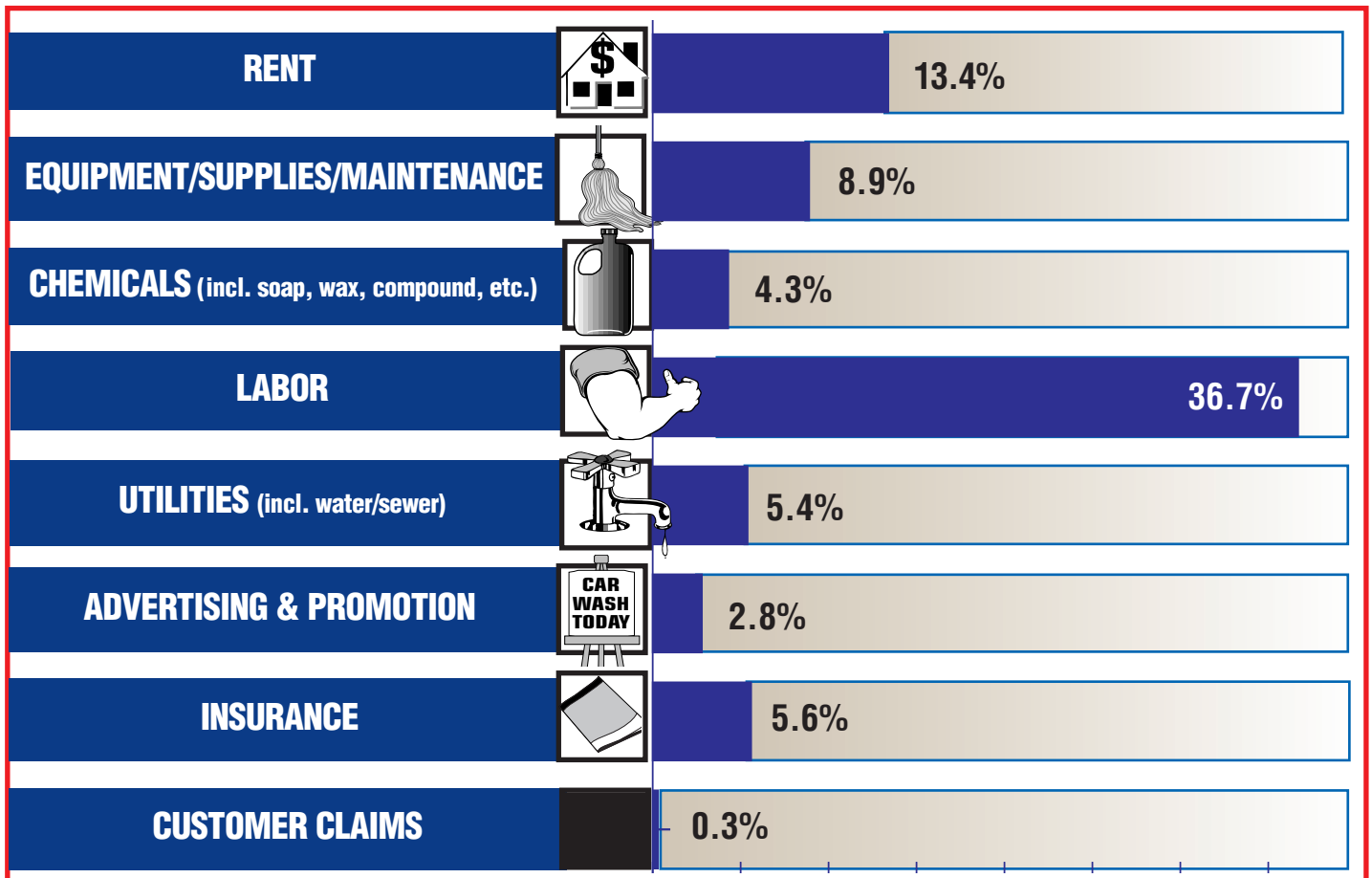
CUSTOMER PROFILE

RETAIL VEHICLE PROFILE

76% - Retail	19% - Auto Dealers
2% - Taxi/Limo	3% - Other <small>(Fleets, Body Shops, Etc.)</small>

16% - New (under 1 yr. old)	27% - 3-5 yrs. old
23% - 1-2 yrs. old	34% - 5+ yrs. old

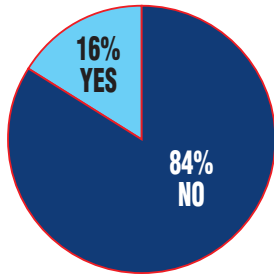
OPERATING COSTS AS PERCENTAGE OF REVENUE



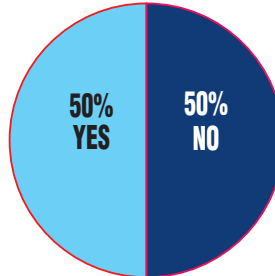
SURVEY

OFFER EXPRESS SERVICES

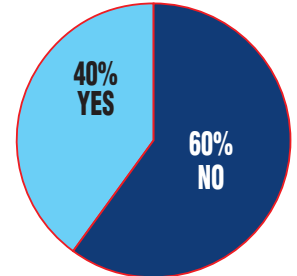
FREESTANDING



CAR WASH COMBO



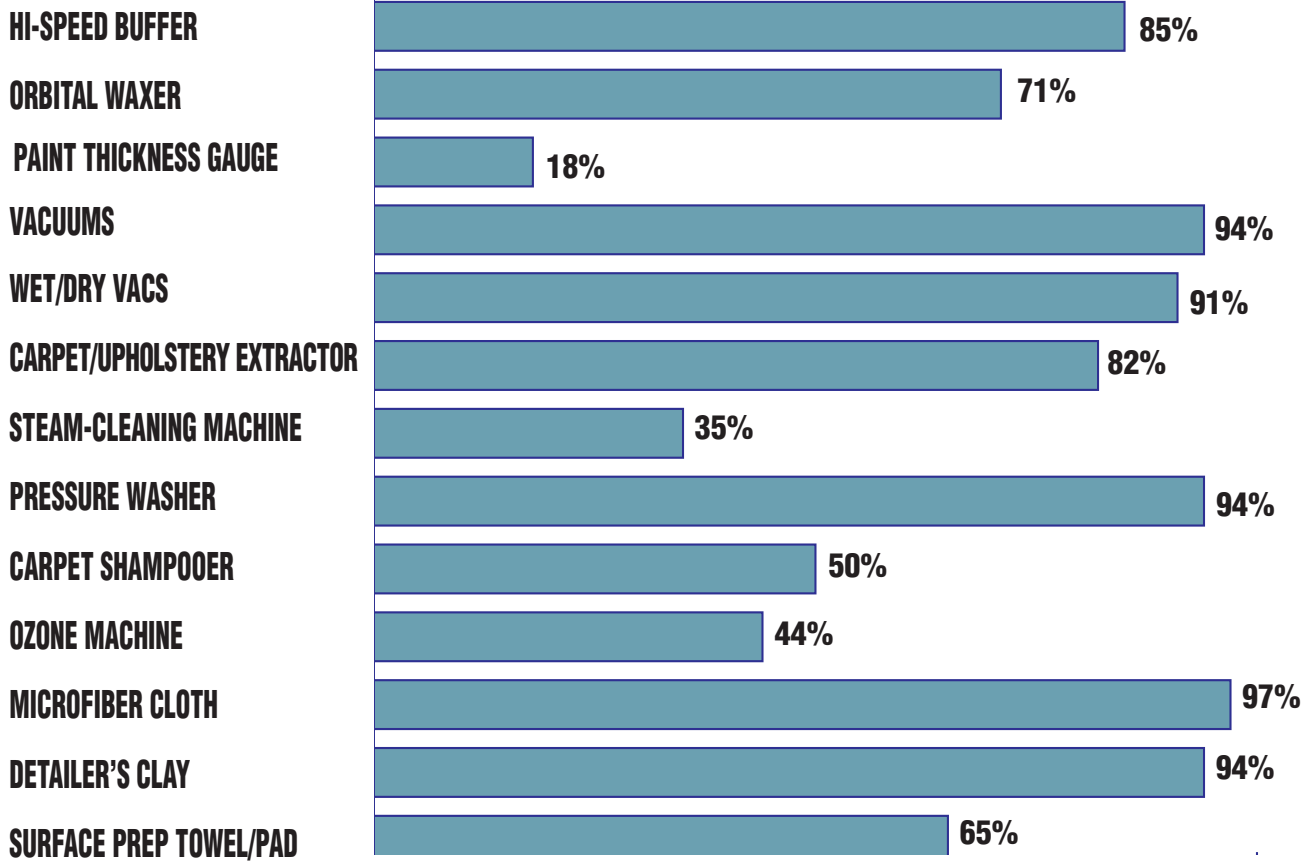
MOBILE SERVICES



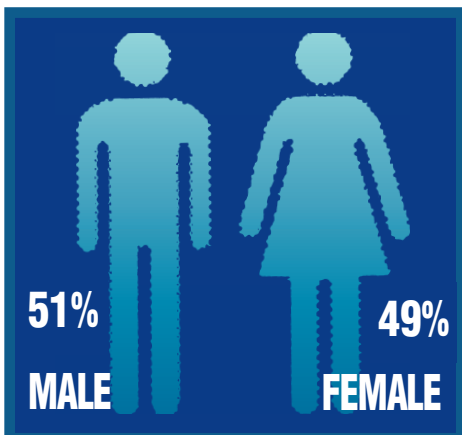
TYPE

STANDARD EQUIPMENT

PERCENTAGE UTILIZING

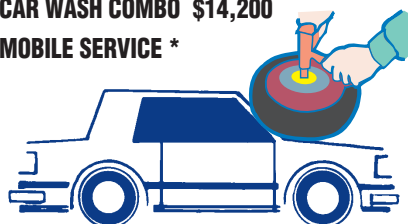


RETAIL CONSUMER PROFILE



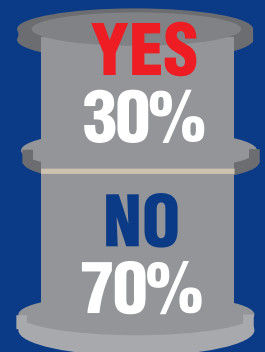
AVERAGE MONTHLY GROSS INCOME (DETAIL SERVICES ONLY)

FREESTANDING \$12,333
 CAR WASH COMBO \$14,200
 MOBILE SERVICE *



* Too Few Responses

EMPLOY CERTIFIED DETAILERS




AVERAGE PACKAGE PRICES

RETAIL	FREE-STANDING	CAR WASH COMBO	MOBILE SERVICE
COMPLETE INTERIOR/EXTERIOR DETAIL	\$200.77	\$192.40	\$190.80
INTERIOR DETAIL ONLY	\$114.23	\$121.70	\$123.50
EXTERIOR DETAIL ONLY	\$135.83	\$99.40	\$110.75

WHOLESALE	FREE-STANDING	CAR WASH COMBO	MOBILE SERVICE
COMPLETE INTERIOR/EXTERIOR DETAIL	\$153.33	\$135.00	\$142.25
INTERIOR DETAIL ONLY	\$77.50	\$91.50	\$73.00
EXTERIOR DETAIL ONLY	\$85.00	\$79.00	\$79.60

LABOR COSTS



AVG. WAGE PER HOUR PER EMPLOYEE

12%	PAID MINIMUM WAGE
26%	PAID MINIMUM to \$10.00 PER HOUR
31%	PAID \$10.00 to \$12.00 PER HOUR
31%	PAID OVER \$12.00 PER HOUR

PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

	FREE-STANDING	CAR WASH COMBO	MOBILE SERVICES
MONDAY	17	14	12
TUESDAY	15	13	10
WEDNESDAY	14	16	8
THURSDAY	20	13	19
FRIDAY	21	16	20
SATURDAY	11	19	24
SUNDAY	2	9	7

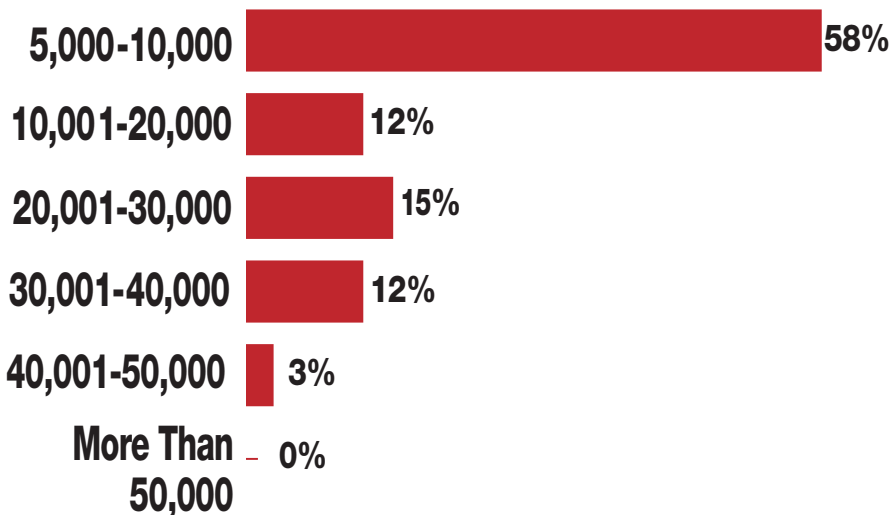
SURVEY

A LA CARTE SERVICES

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE	
		FREESTANDING	CAR WASH COMBO
HAND WAX	75%	\$72.70	\$46.00
MACHINE WAX/BUFF	61%	\$122.14	\$65.00
CARPET SHAMPOO	79%	\$65.62	\$58.75
UPHOLSTERY CLEANING	75%	\$66.10	\$61.88
LEATHER/VINYL (INT.) DRESSING	79%	\$32.14	\$39.30
VINYL/RUBBER (EXT.) DRESSING	54%	\$23.75	\$10.00
DEODORIZING	71%	\$55.00	\$63.00
PAINT TOUCH-UP	32%	\$33.30	*
PAINTLESS DENT REMOVAL	18%	\$82.50	**
WINDSHIELD REPAIR	28%	\$58.30	\$50.00
EXTENDED UPHOLSTERY PROT.	32%	\$108.75	*
EXTENDED PROT. PAINT SEALANT	39%	\$158.00	\$150.00
HEADLIGHT RESTORATION	79%	\$83.18	\$49.00
ENGINE CLEANING	57%	\$40.90	\$62.50
WINDOW TINTING	25%	\$196.67	\$99.00
PINSTRIPING	18%	\$50.00	**

* Too Few Responses ** Not Offered

DAILY TRAFFIC COUNT



AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

