

AutoLaundry^{news}

Results From The *Auto Laundry News*

2021 Detail Survey

The 2021 *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. The percentage of responses from Car Wash Combos this year moved closer to the norm after a sharp decline in the previous

survey. A three-year perspective of the category breakdown appears in the following table:

Detailer Type	2021	2020	2019
Freestanding	52%	63%	52%
Car Wash Combo	28%	16%	38%
Mobile Services	16%	12%	0%
Other Combo	4%	9%	10%

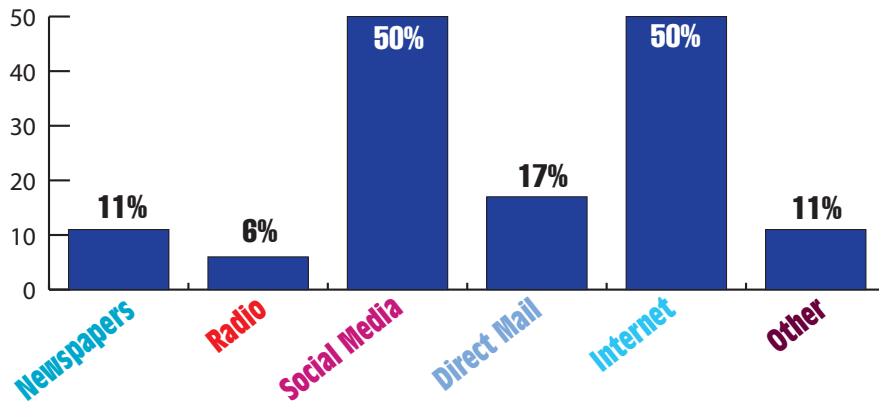
PERFORMANCE

This is the third consecutive year that a minority of respondents, overall, reports improvement in their business year over year. In the current survey, only 19 percent of respondents report such progress. Two years ago, that figure stood at 44 percent; last year it was 43 percent. There has also been an appreciable dip in the proportion of those experiencing no change: from 47 percent last year to 29 percent currently. Overall, 52 percent of respondents report declining business compared to 10 percent who did so last year. A quarter of both Freestanding shops and Mobile Services saw improved business, while none of the Car Wash Combo participants did so.

PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON

	WINTER	SPRING	SUMMER	FALL
FREE-STANDING	19	28	28	26
CAR WASH COMBO	18	32	30	20
MOBILE	23	24	30	24

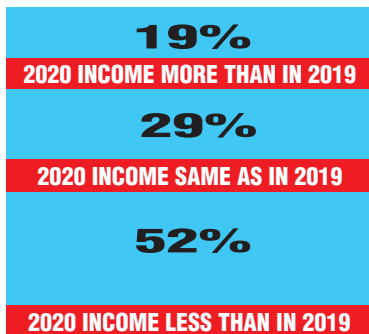
ADVERTISING & PROMOTION
72% ADVERTISE



COVID-19

COVID-19 has had a marked effect on detailers. Overall, 44 percent report closing their businesses because of the pandemic: 46 percent of Freestanding shops closed for an average of 6 weeks; 57 percent of Car Wash Combos did so for an average of four weeks. Overall, 68 percent report a decrease in sales due to COVID-19: 69 percent of Freestanding shops report an average decrease of 32 percent; 86 percent of Car Wash Combos experienced an average 40 percent setback; 50 percent of Mobile Services saw an average drop of 12.5 percent. 📉

INCOME COMPARED TO LAST YEAR



OPERATOR PROFILE

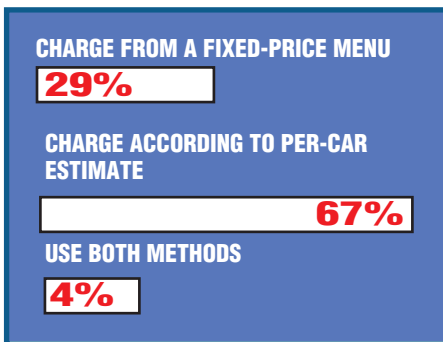
Freestanding Detail Shop	52%
Mobile Detailing	16%
Full-Service Conveyor Car Wash	16%
Exterior-Only Car Wash	8%
Self-Serve Car Wash	4%
In-Bay Automatic	4%
Oil Change/Lube	16%
Gas Station	0%
Other	12%

SURVEY

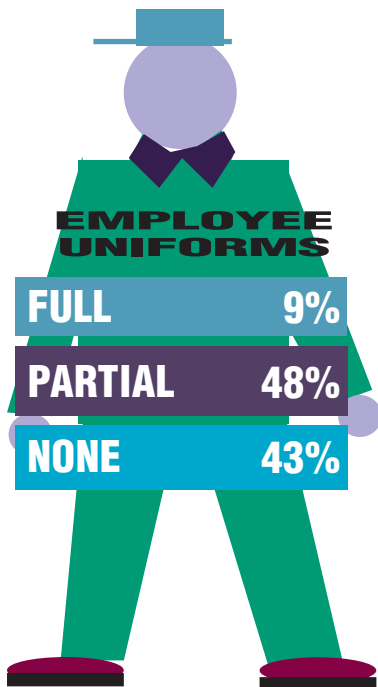
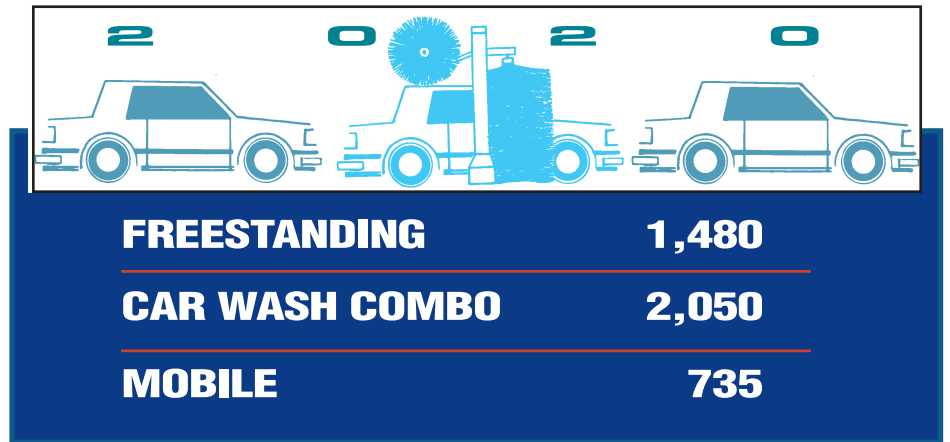
AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE



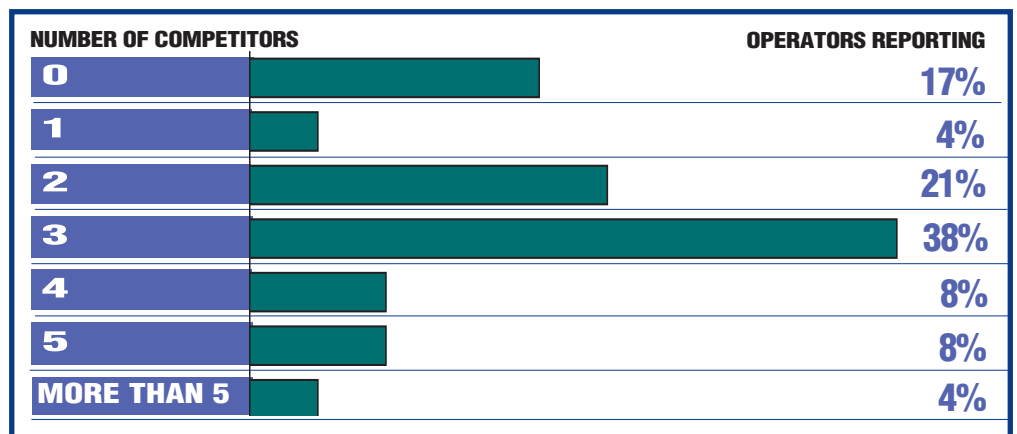
DETAIL SERVICE PRICES



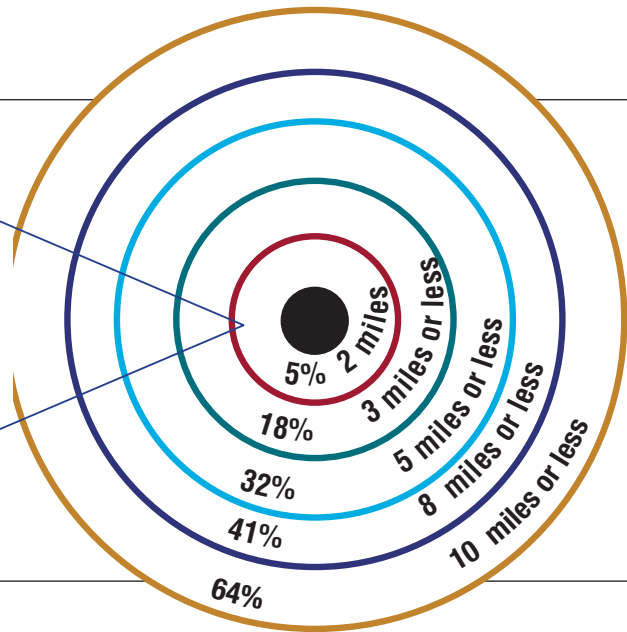
AVERAGE NUMBER OF CARS DETAILED ANNUALLY



COMPETING DETAIL SHOPS IN AREA



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



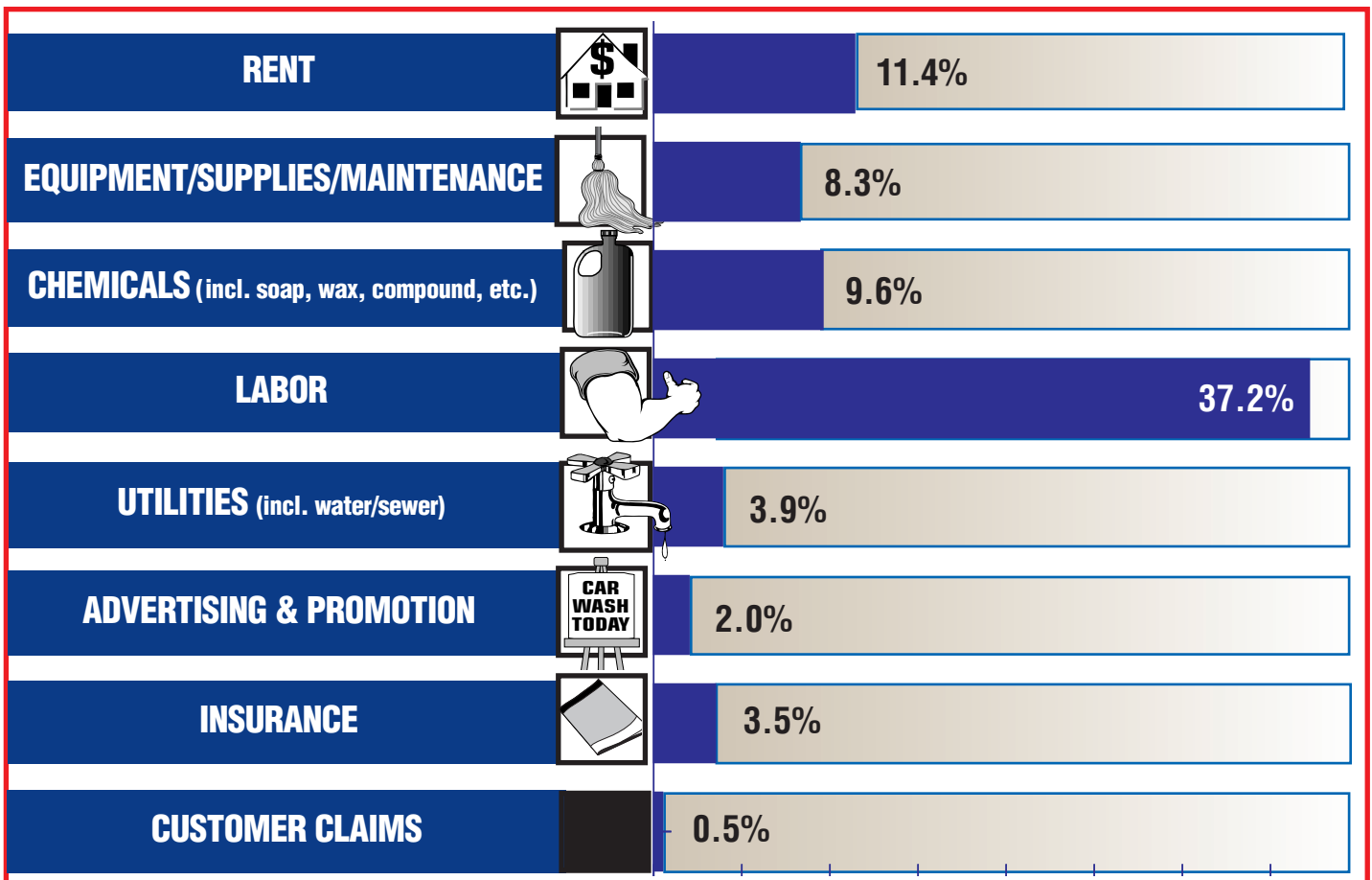
CUSTOMER PROFILE

RETAIL VEHICLE PROFILE

76% – Retail	11% – Auto Dealers
2% – Taxi/Limo	11% – Other <small>(Fleets, Body Shops, Etc.)</small>

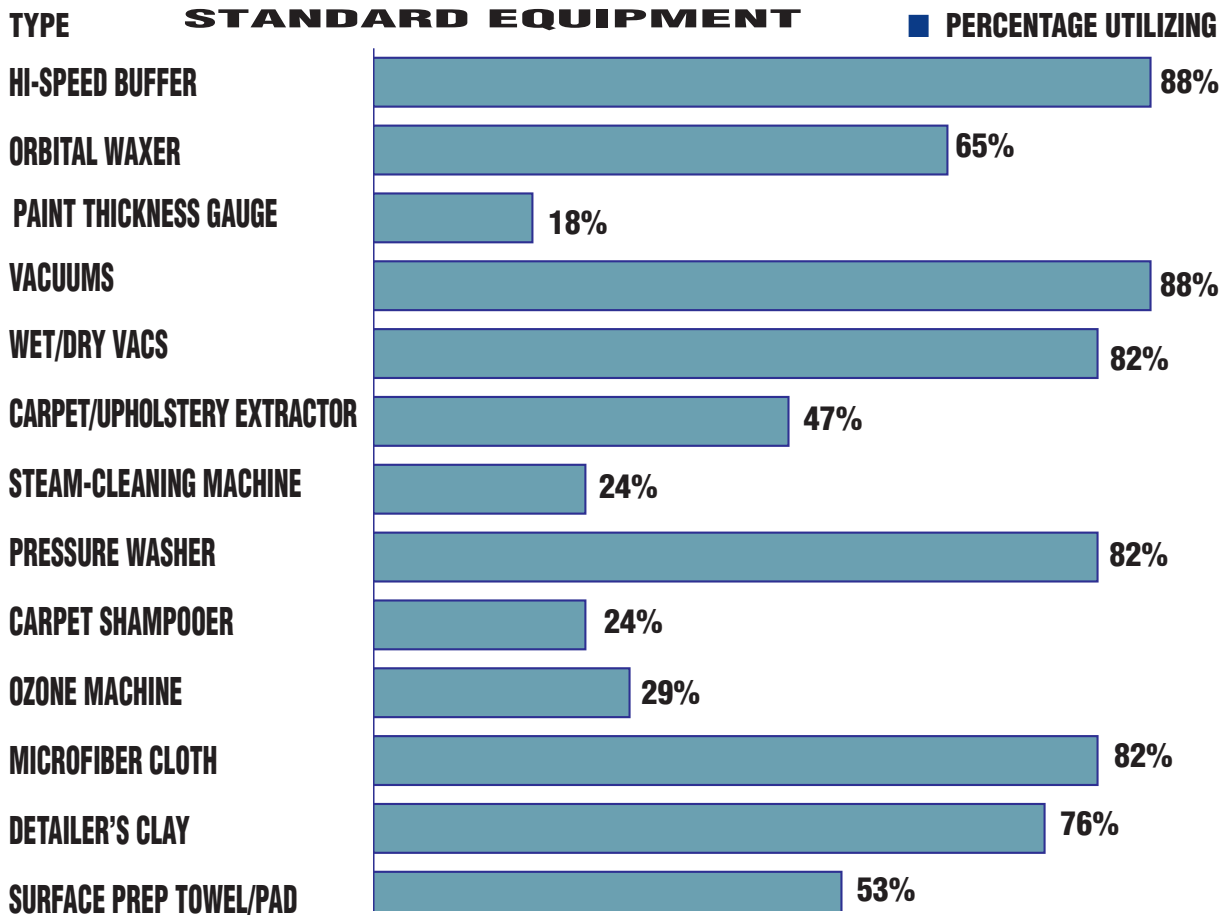
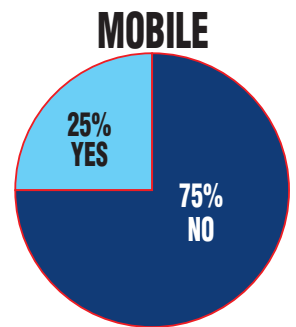
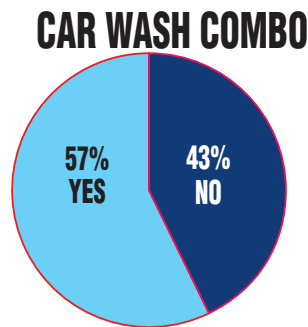
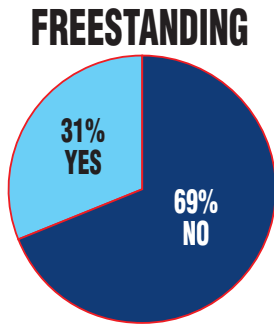
22% – New (under 1 yr. old)	27% – 3-5 yrs. old
24% – 1-2 yrs. old	28% – 5+ yrs. old

OPERATING COSTS AS PERCENTAGE OF REVENUE

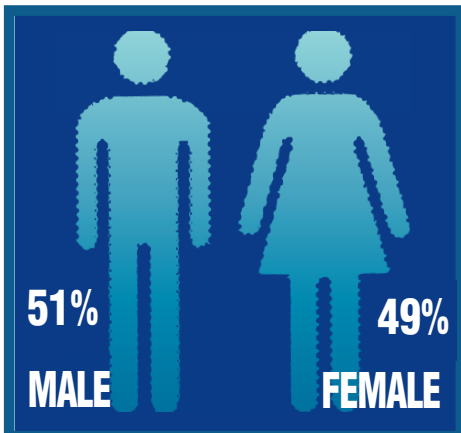


SURVEY

OFFER EXPRESS SERVICES

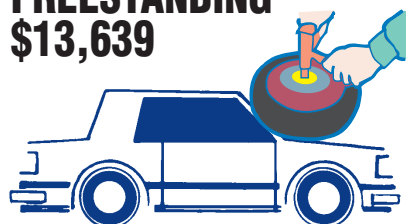


RETAIL CONSUMER PROFILE

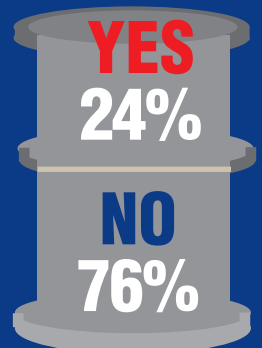


AVERAGE MONTHLY GROSS INCOME (DETAIL SERVICES ONLY)

FREESTANDING \$13,639



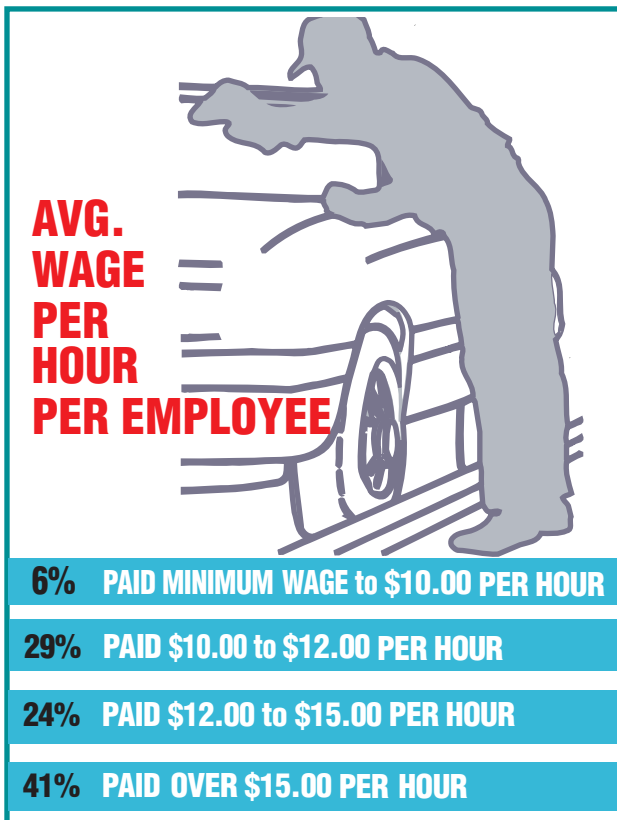
EMPLOY CERTIFIED DETAILERS



AVERAGE PACKAGE PRICES

RETAIL	FREE- STANDING	CAR WASH COMBO
COMPLETE INTERIOR/EXTERIOR DETAIL	\$229.78	\$228.50
INTERIOR DETAIL ONLY	\$134.75	\$103.50
EXTERIOR DETAIL ONLY	\$123.50	\$96.75
WHOLESALE	FREE- STANDING	CAR WASH COMBO
COMPLETE INTERIOR/EXTERIOR DETAIL	\$195.67	\$111.50
INTERIOR DETAIL ONLY	\$119.50	\$96.33
EXTERIOR DETAIL ONLY	\$123.67	\$82.33

LABOR COSTS



PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

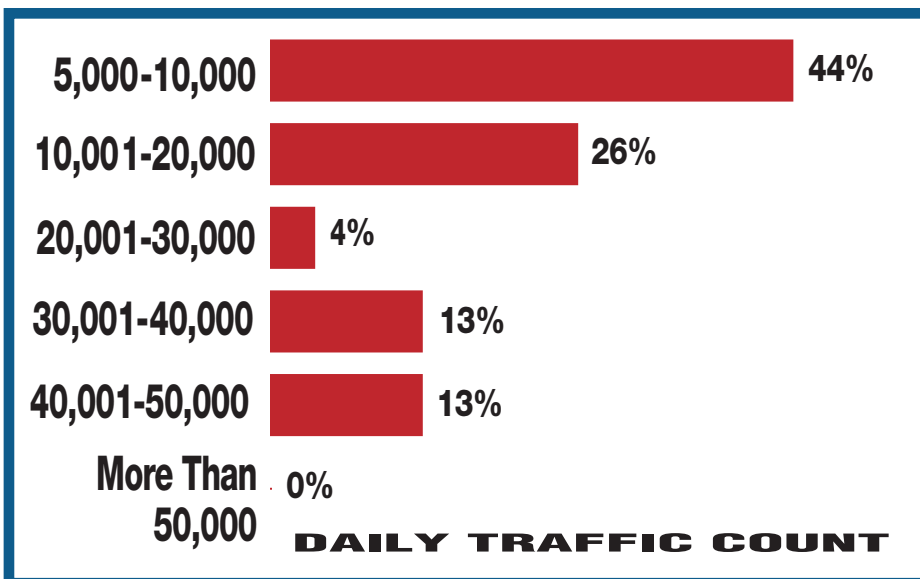
	FREE- STANDING	CAR WASH COMBO
MONDAY	16	13
TUESDAY	17	11
WEDNESDAY	21	11
THURSDAY	19	21
FRIDAY	20	23
SATURDAY	6	20
SUNDAY	1	1

SURVEY

A LA CARTE SERVICES AT FREESTANDING SHOPS

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE
HAND WAX	83%	\$72.57
MACHINE WAX/BUFF	42%	\$101.60
CARPET SHAMPOO	67%	\$69.00
UPHOLSTERY CLEANING	58%	\$80.50
LEATHER/VINYL (INT.) DRESSING	67%	\$36.50
VINYL/RUBBER (EXT.) DRESSING	58%	\$21.00
DEODORIZING	58%	\$40.25
PAINT TOUCH-UP	33%	\$45.00
PAINTLESS DENT REMOVAL	17%	\$100.00
WINDSHIELD REPAIR	8%	*
EXTENDED UPHOLSTERY PROT.	12%	*
EXTENDED PROT. PAINT SEALANT	25%	\$350.00
HEADLIGHT RESTORATION	58%	\$58.80
ENGINE CLEANING	75%	\$30.50
WINDOW TINTING	5%	*
PINSTRIPING	8%	*
CERAMIC COATING	33%	\$416.67

* Too few responses



AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

