

# AutoLaundry<sup>news</sup>

**SURVEY**

# Results From The Auto Laundry News 2015 Self-Service Survey

**T**he 2015 *Auto Laundry News* Self-Service Survey was conducted through a mailing of questionnaires to a random selection of subscribers who own or operate self-service car wash locations. The information in this report results from an analysis of data provided by 119 respondents throughout the United States.

On occasion, for purposes of comparison, survey responses from sites with in-bay automatics (sites with) and sites without this type of equipment (sites without) are tabulated separately. In the current survey, participating locations with in-bay automatics make up 55 percent of the total response.

**Revenues**

Aside from a minor hiccup in 2011, there has been a steady increase year over year in the percentage of respondents, overall, reporting income growth compared to the previous year. Finally, last year that percentage topped the 50 percent mark. In what is hopefully another minor hiccup, there has been a small drop in the current survey in the proportion of respondents whose operations experienced growth: 52 percent of respondents reported progress last year; currently, 48 percent do so. At 20 percent, the share of respondents reporting declining revenues is a smidge higher than last year's figure of 19 percent.

Sites with continue to outperform sites without, though the gap has narrowed: 50 percent of the former (60 percent last year) report higher revenues, while 45 percent (43 percent last year) of sites without do so. In measuring reversals, the separation is more pronounced: 16 percent of sites with report generating less revenue than last year, while 24 percent of sites without do so. Sites with realize \$1,579 monthly income (\$1,533 last year) per wand wash bay compared to \$1,284 for sites without (\$1,288 last year).

Sites with report average revenue of \$270 (\$267 last year) per vacuum, while site without collect \$212 (\$234 last year).

**Equipment**

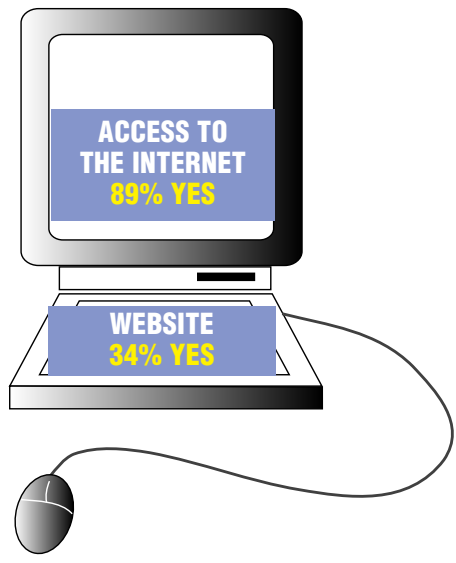
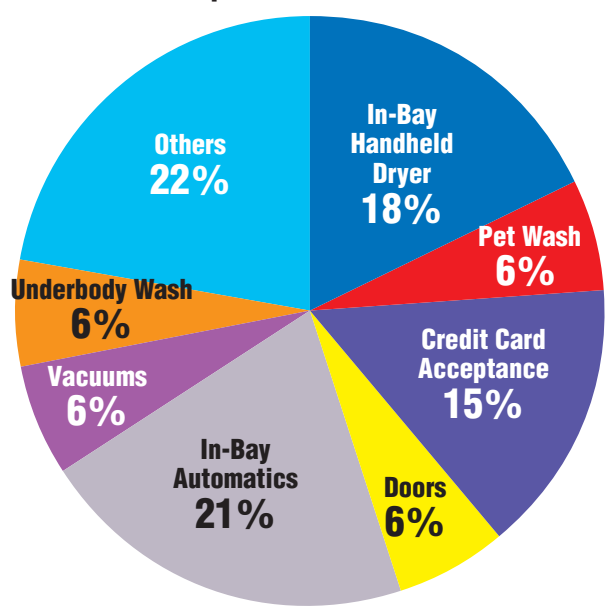
Overall, 55 percent of self-service washes have in-bay automatics on site, 2 percent have full-service, 3 percent have flex-serve, and 6 percent have express-exterior washes.

As was the case last year, sites with added new equipment during the previous 12 months in far greater numbers than did sites without — 33 percent and 13 percent, respectively. While in-bay automatics have made a strong comeback as favorite acquisition, handheld wand-bay dryers and in-bay credit card acceptance remain in the top three. The graphic, below, offers more detail.

Twenty three percent of both sites with and sites without are planning on purchasing equipment during the 12 months ahead. The three top items purchased last year again appear first on the shopping list, but in different order: handheld wand-bay dryers are number one with 24 percent of total planned purchases. The number two position goes to in-bay automatics with 21 percent, while in-bay credit card acceptance comes in third at 12 percent.

**NEW EQUIPMENT**

24% of operators added equipment in the past 12 months



**RESPONDENTS OPERATING AN IN-BAY AUTOMATIC ON THEIR COIN-OP LOCATION**



**SURVEY**

**PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION**

	WINTER	SPRING	SUMMER	FALL
<b>Pacific</b>	15	25	38	22
<b>Mountain</b>	23	24	28	25
<b>Midwest</b>	30	28	21	21
<b>Central</b>	39	29	17	15
<b>South Central</b>	29	28	20	23
<b>Southeast</b>	28	29	20	23
<b>Mid-Atlantic</b>	47	21	19	13
<b>New England</b>	*	*	*	*

\*Too Few Responses

**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

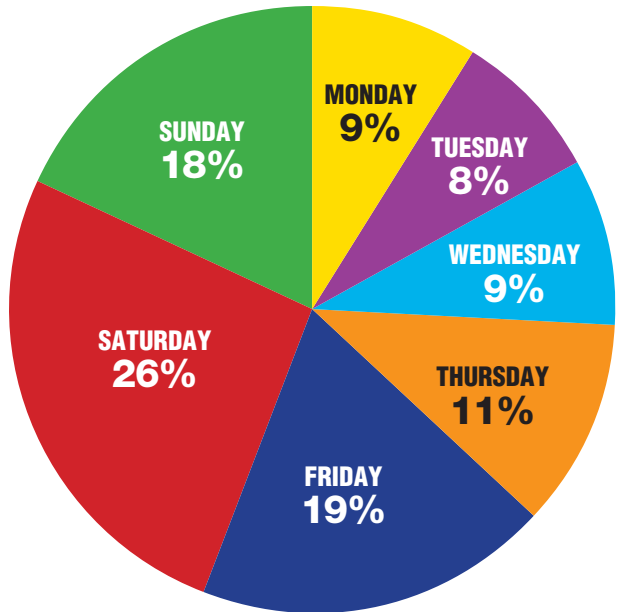
**South Central**  
Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

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

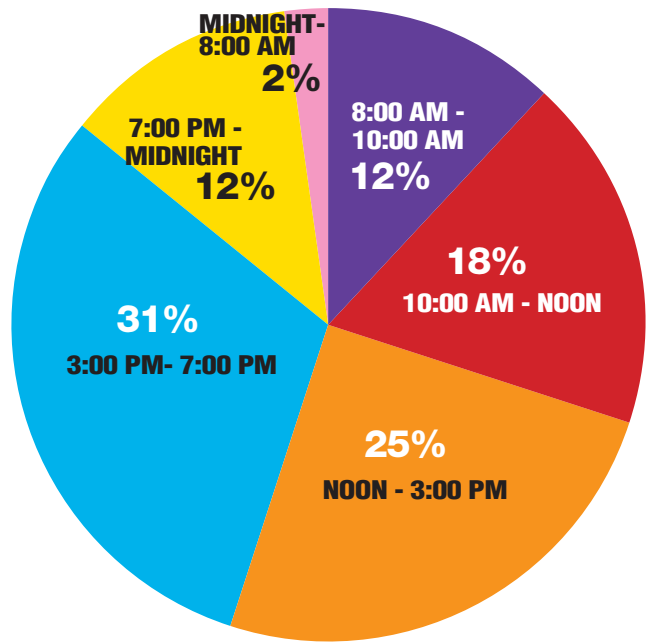
**Mid-Atlantic**  
New Jersey-New York-Pennsylvania

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

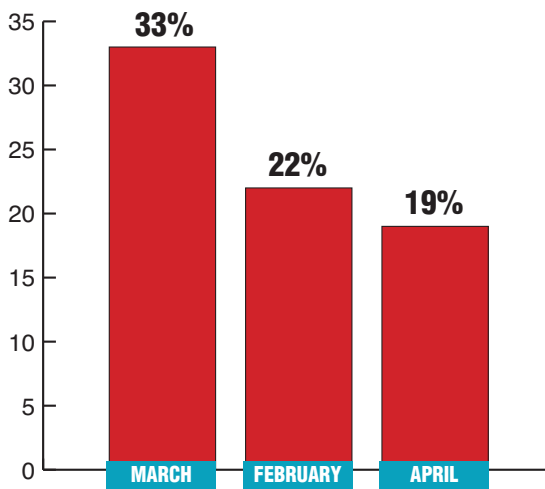
**PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK**



**PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY**



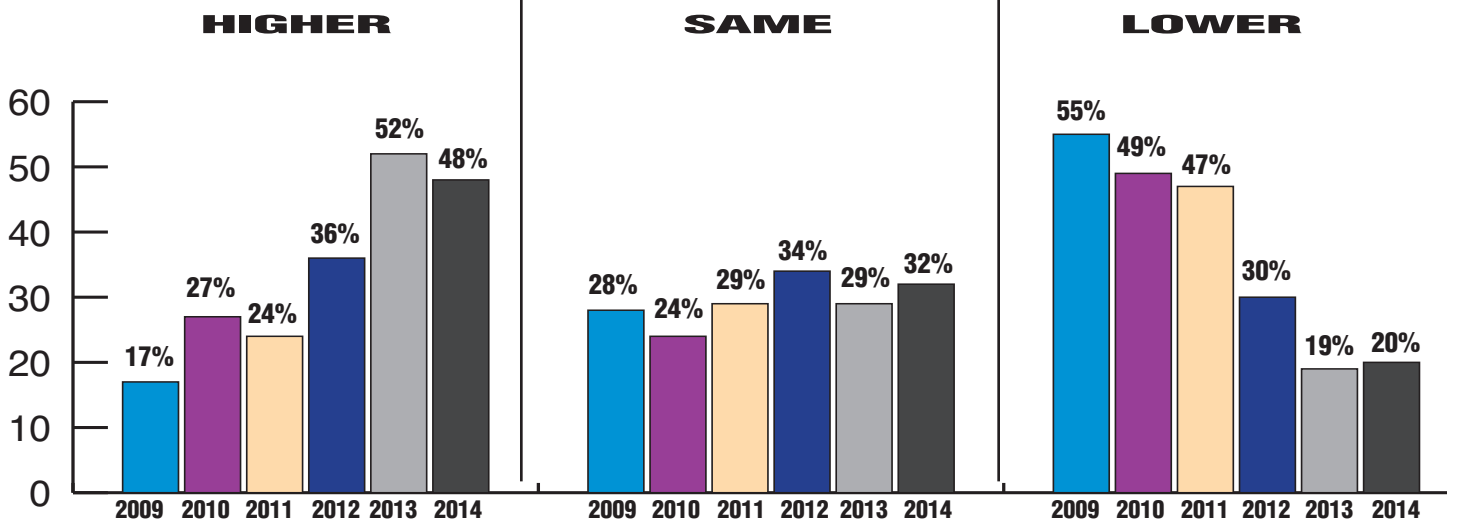
**VOTED BEST MONTHS**



**ATTENDANT**

	2010	2011	2012	2013	2014
<b>FULL-TIME</b>	14%	20%	13%	15%	20%
<b>PART-TIME</b>	36%	39%	42%	38%	39%
<b>NONE</b>	50%	41%	45%	47%	41%

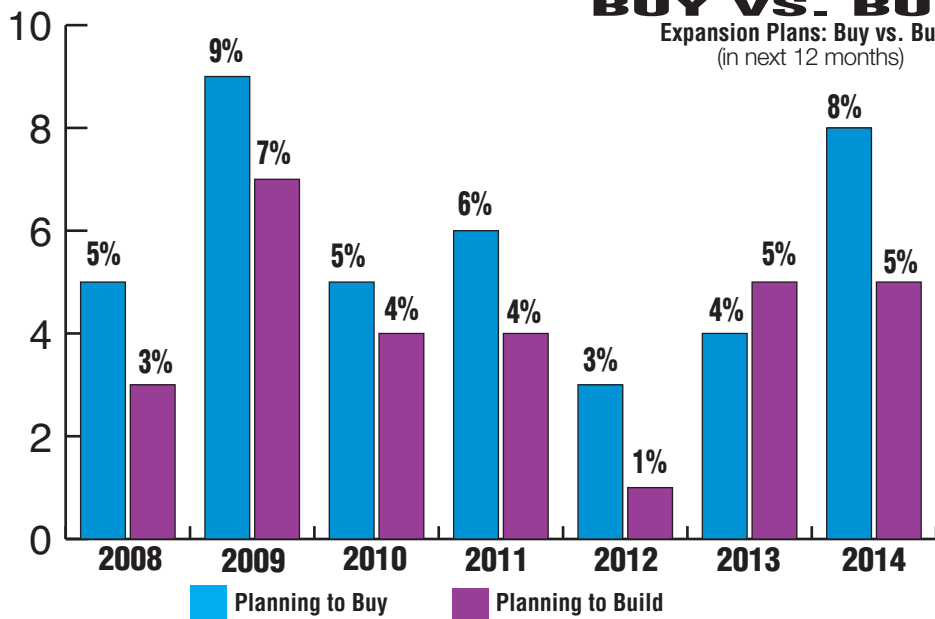
## INCOME (COMPARED TO PREVIOUS YEAR)



## EXPANSION PLANS

### BUY VS. BUILD

Expansion Plans: Buy vs. Build  
(in next 12 months)



**HOURS OF OPERATION**

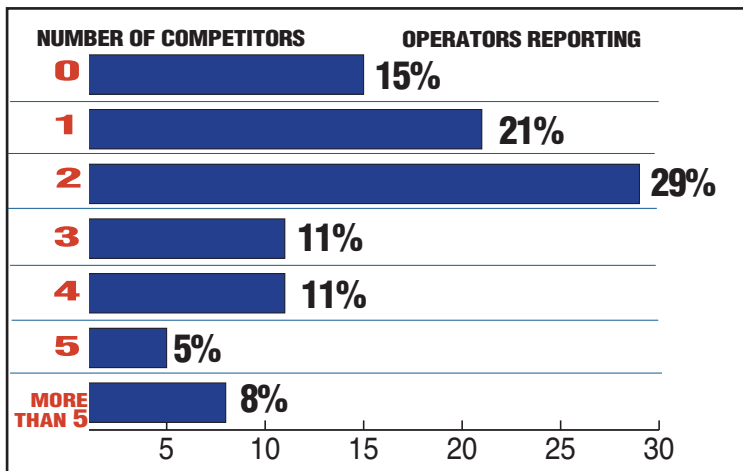
**OPEN SUNDAYS**

**97%**

**OPEN 24 HOURS**

**91%**

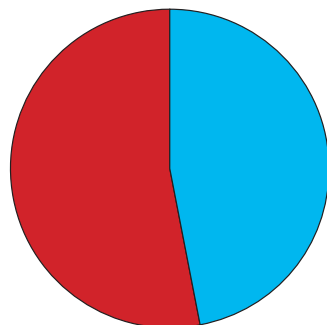
### COMPETING SELF-SERVE IN AREA



### RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/Self-SERVICE FACILITY

**53%**

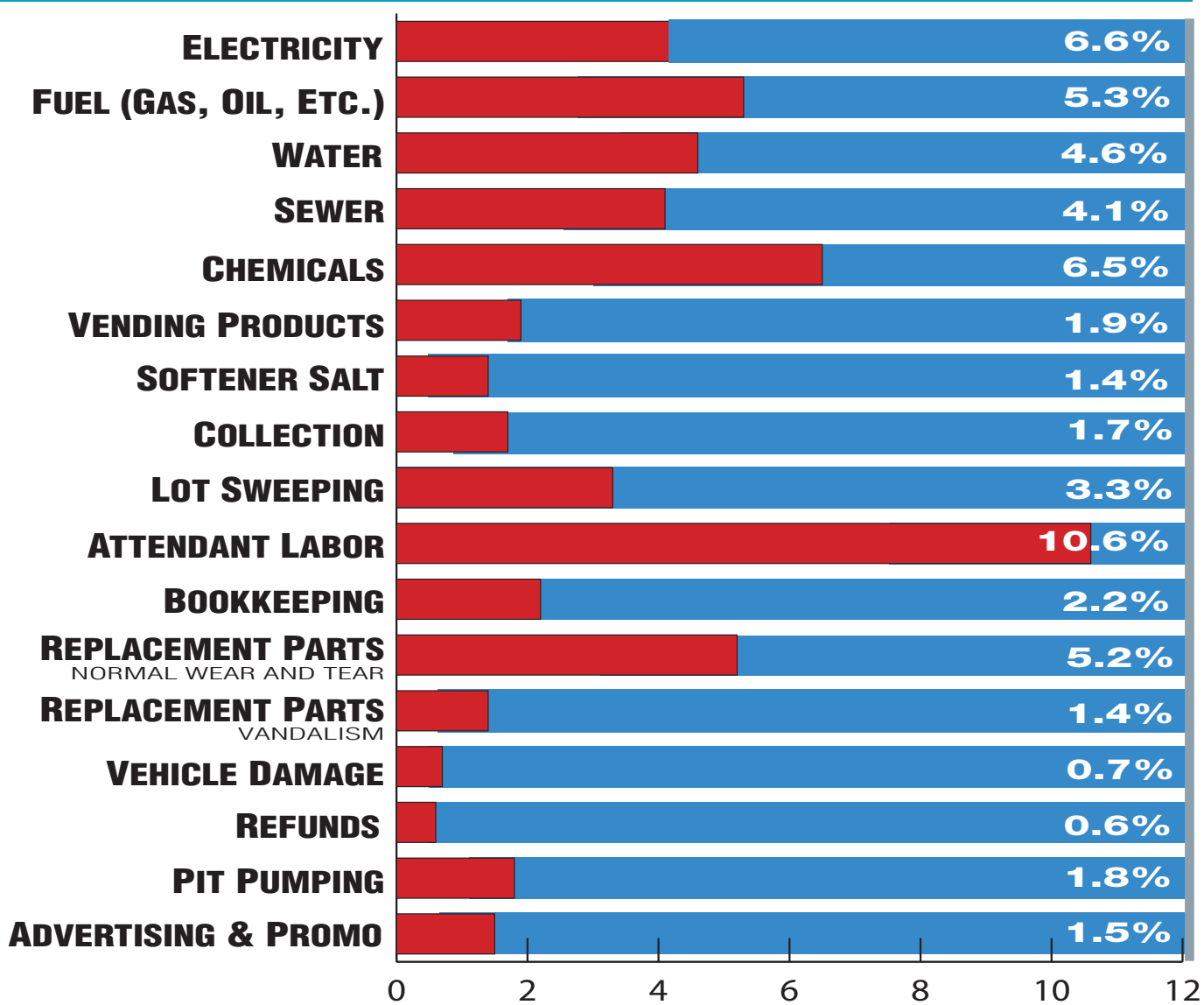
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



**47%**

SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

## EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



THE AVERAGE  
MONTHLY  
GROSS  
INCOME  
PER BAY  
WAS  
**\$1,450**



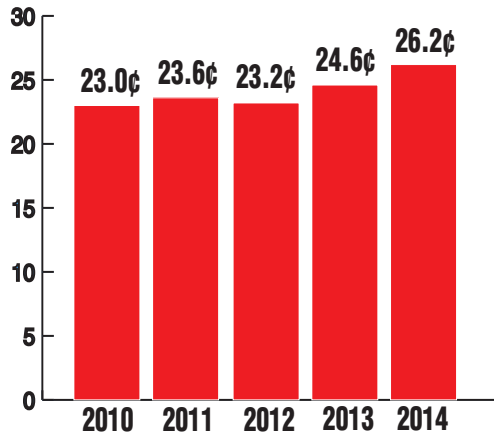
THE  
AVERAGE  
MONTHLY  
GROSS  
INCOME  
PER  
VACUUM  
WAS  
**\$245**



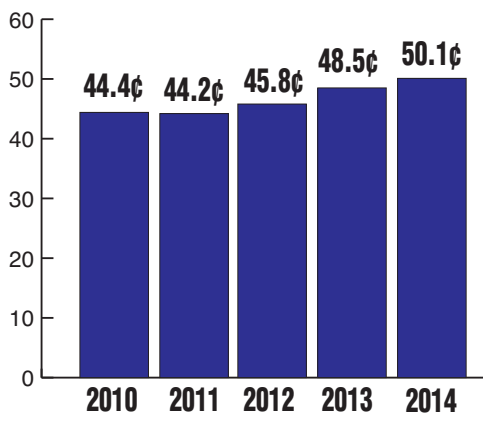
THE  
AVERAGE  
MONTHLY  
GROSS  
INCOME  
FOR  
VENDING  
WAS  
DROP-SHELF: \$257  
GLASS FRONT: \$405

## PRICE

### VACUUMS PRICE PER MINUTE



### WASH BAYS PRICE PER MINUTE

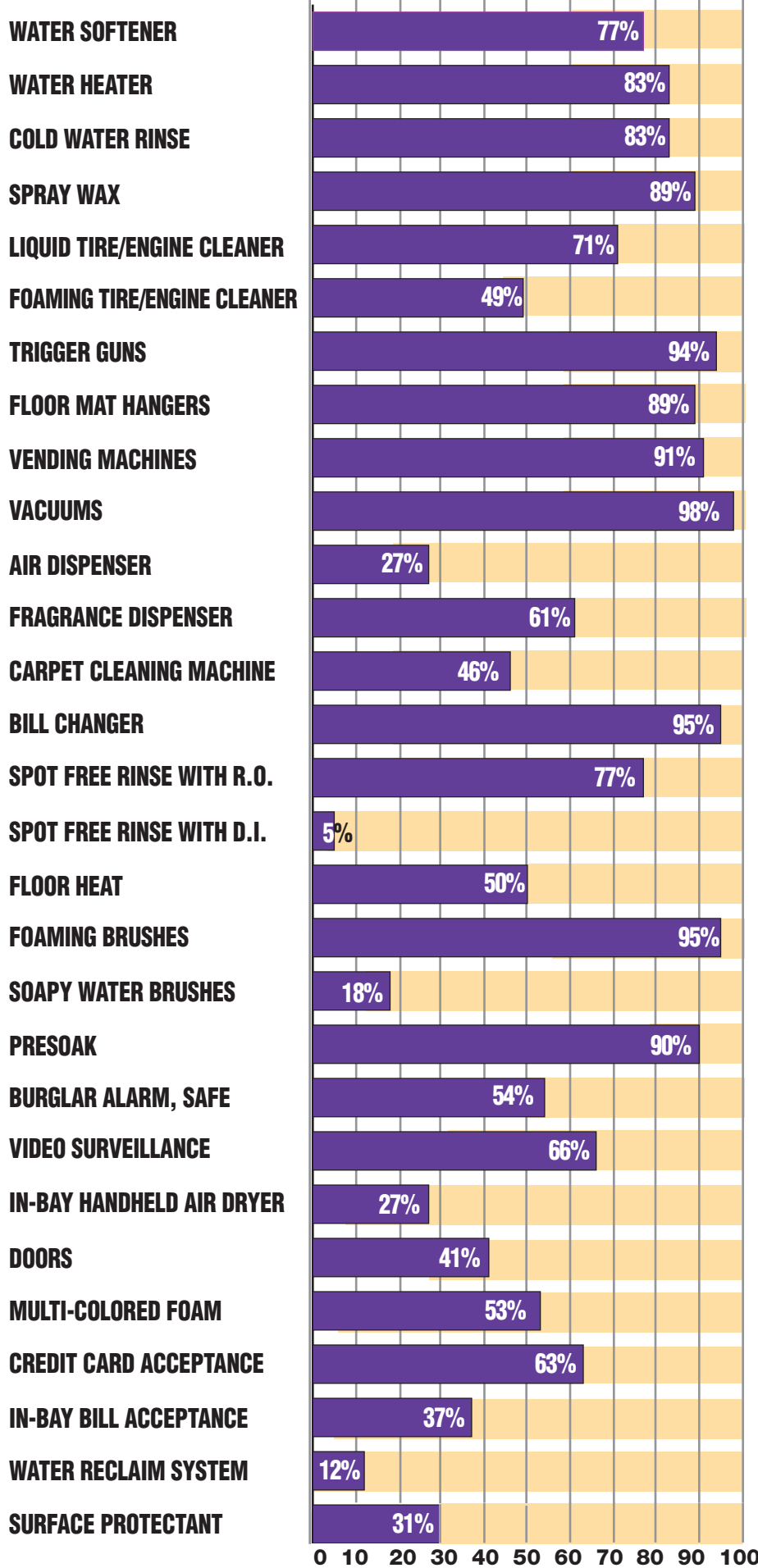


## EXPRESS EXTERIOR NEARBY

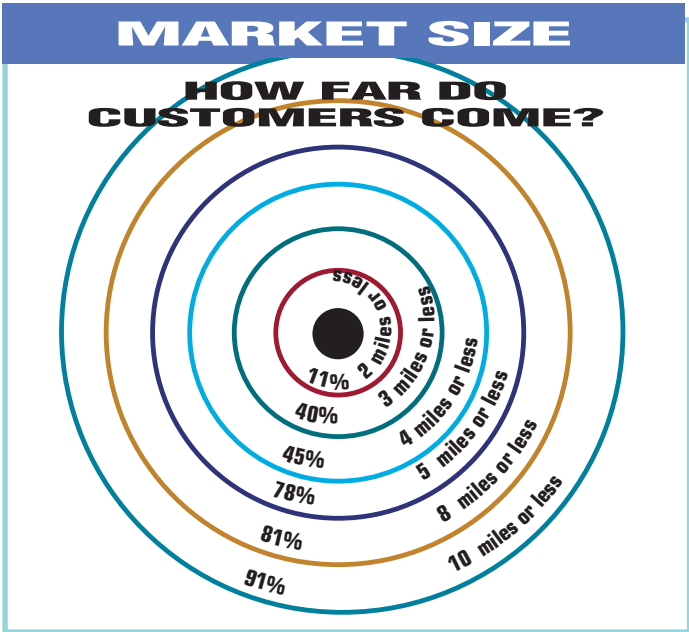
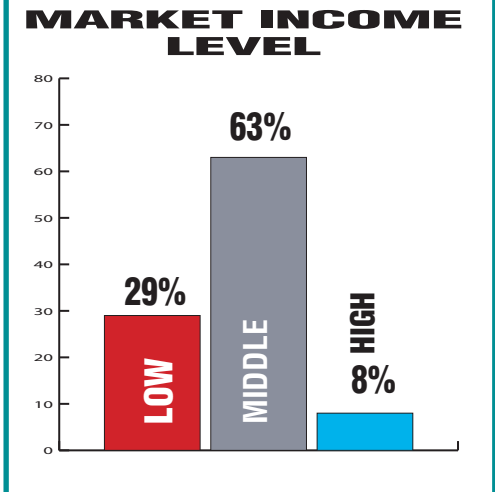
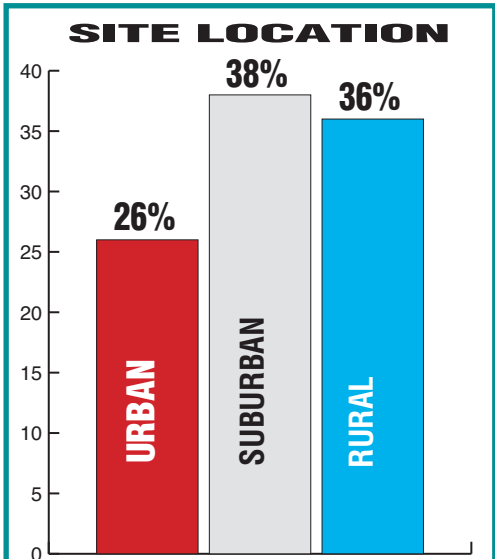
No 39%  
Yes 61%

HAS HURT BUSINESS	HAS NOT HURT BUSINESS
47%	53%

## CURRENT EQUIPMENT



## SURVEY



## AUTOMATICS

