

AutoLaundry^{news}

SURVEY

Results From The Auto Laundry News 2018 Self-Service Survey

The 2018 *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 respondents throughout the United States.

For purposes of comparison, survey responses from sites with in-bay automatics (sites with) and sites without this type of equipment (sites without) are on occasion tabulated separately. In the current survey, participating locations with in-bay automatics make up 57 percent of the total response. Four percent of these sites (i.e., 2 percent of the total response) also operate a conveyor wash on the same site. Some sites without operate conveyor washes along with their wand bays. These sites account for 9 percent of the total responses, while sites that offer wand bays only make up 34 percent.

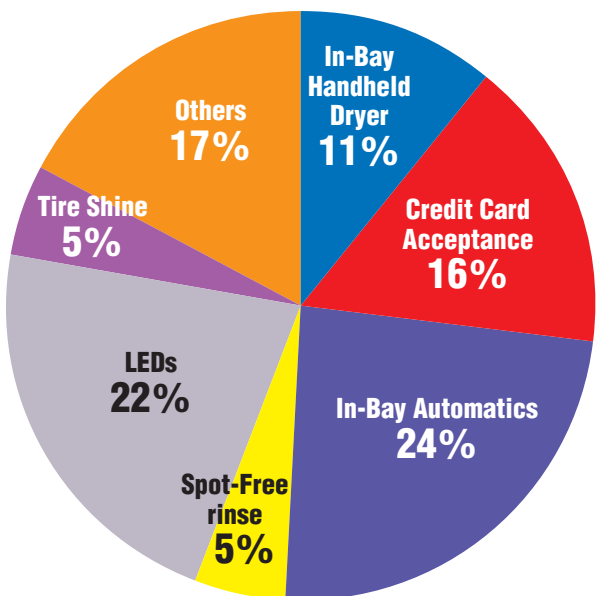
Revenues

There has been little movement over the past five years. In the current survey half of respondents are able to report progress. This compares to 52 percent in the previous survey who reported improvement and 51 percent the year before that. A slightly smaller percentage of participants this year than last report a decrease in income — 17 percent versus 19 percent. The graphic on page 45 illustrates just how flat the survey results have been with regard to performance.

Sites with continue to outperform sites without. Compared to 60 percent last year, 58 percent of sites with report higher revenues, while 37 percent (43 percent last year) of sites without do so. Nearly half (48 percent) of sites without report no change in performance; 24 percent of sites with experienced neither improvement nor reversal.

NEW EQUIPMENT

31% of operators plan to add equipment in the next 12 months



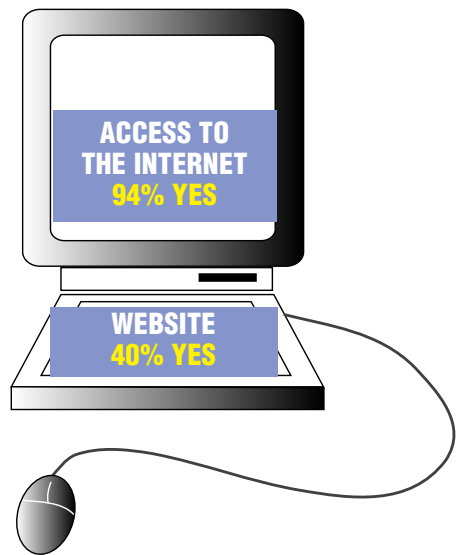
Equipment

Thirty five percent of sites with and 27 percent of sites without are planning to purchase new equipment during the 12 months ahead. In-bay automatics replace last year's LED lighting as the top item on the shopping list. The graphic below shows further detail.

Sites with again reported adding new equipment during the previous 12 months in greater numbers than did sites without — 27 percent (35 percent last year) versus 16 percent (26 percent last year). As was the case last year, in-bay automatics and in-bay credit card acceptance were the most popular additions.

Future

Survey participants continue to show a preference for buying as opposed to building additional sites, though their enthusiasm for expansion has waned some since peaking in 2016. In the current survey, 6 percent of respondents, overall, plan on buying a car wash in the next 12 months, while 4 percent have plans to build. The graphic on page 45 provides a seven-year perspective.



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
Pacific	10	30	45	15
Mountain	33	24	25	19
Midwest	27	24	29	20
Central	35	33	16	17
South Central	26	30	23	22
Southeast	43	23	17	17
Mid-Atlantic	41	29	16	15
New England	*	*	*	*

NOTE: Some results do not total 100 due to rounding

*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

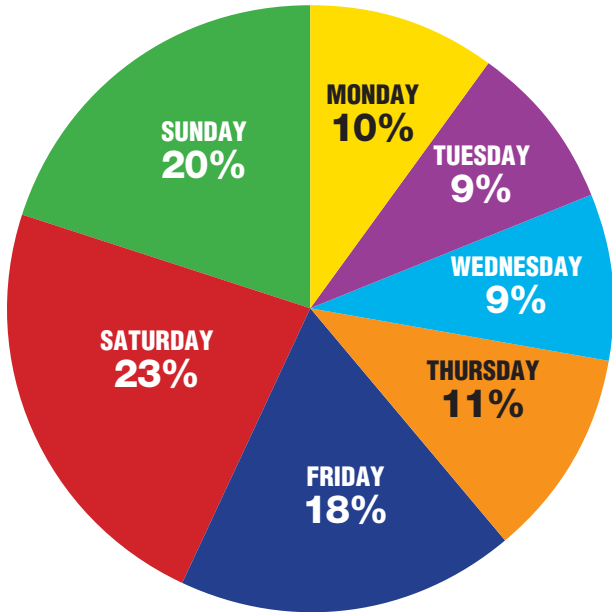
South Central
Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

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

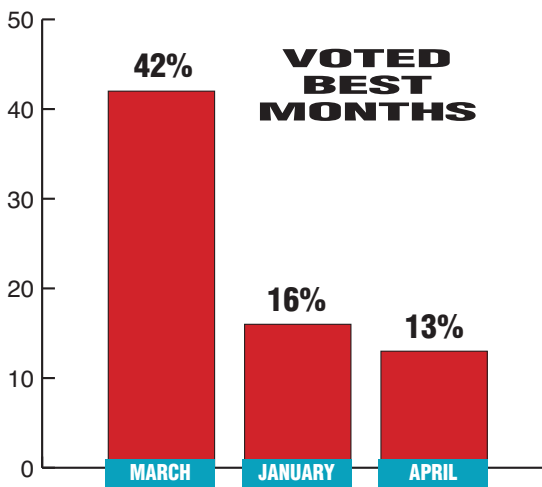
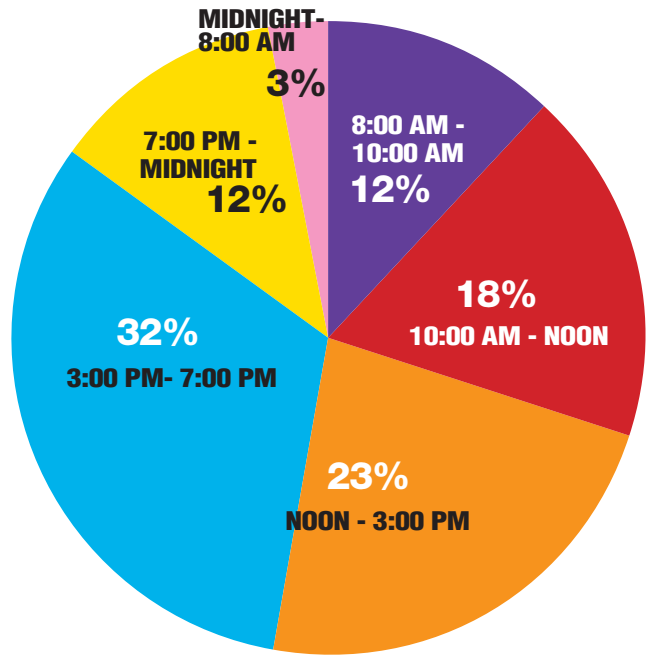
Mid-Atlantic
New Jersey-New York-Pennsylvania

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

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



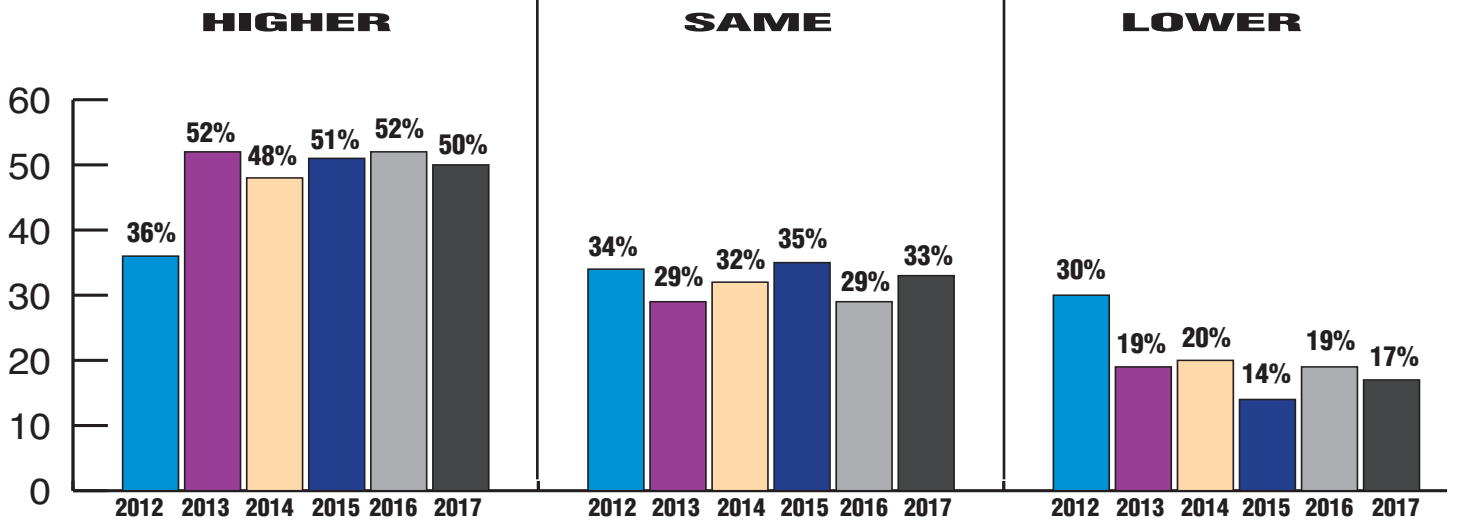
PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



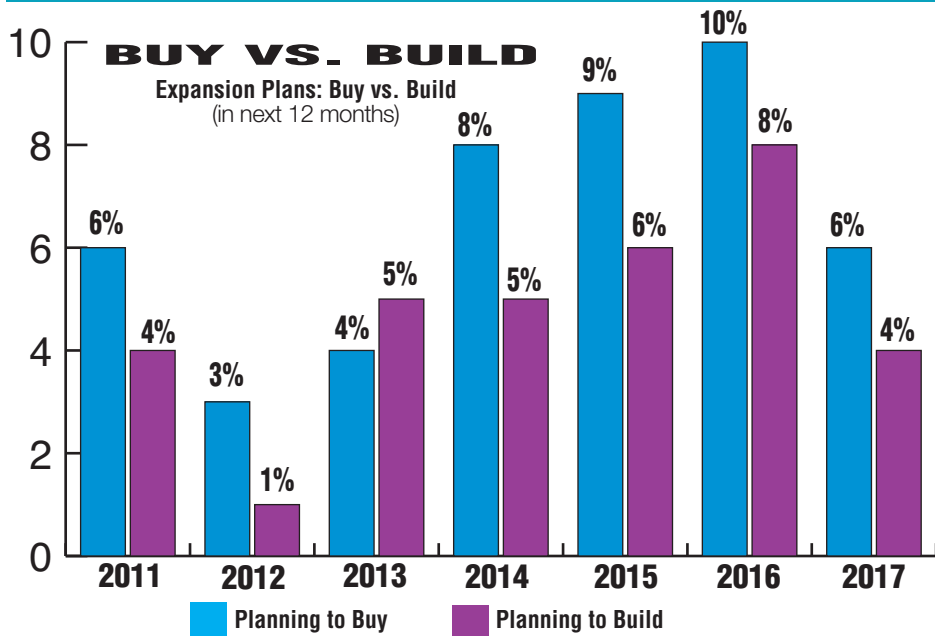
ATTENDANT

	2013	2014	2015	2016	2017
FULL-TIME	15%	20%	18%	16%	16%
PART-TIME	38%	39%	51%	45%	32%
NONE	47%	41%	31%	39%	52%

INCOME (COMPARED TO PREVIOUS YEAR)



EXPANSION PLANS



HOURS OF OPERATION

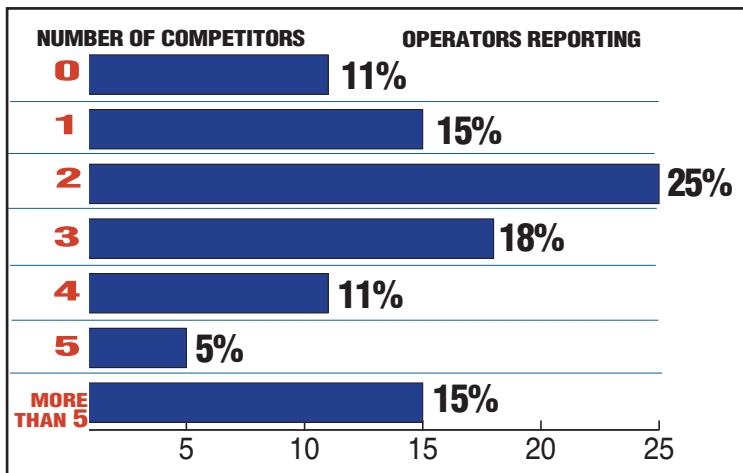
OPEN SUNDAYS

100%

OPEN 24 HOURS

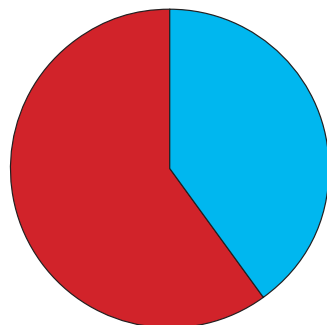
91%

COMPETING SELF-SERVE IN AREA



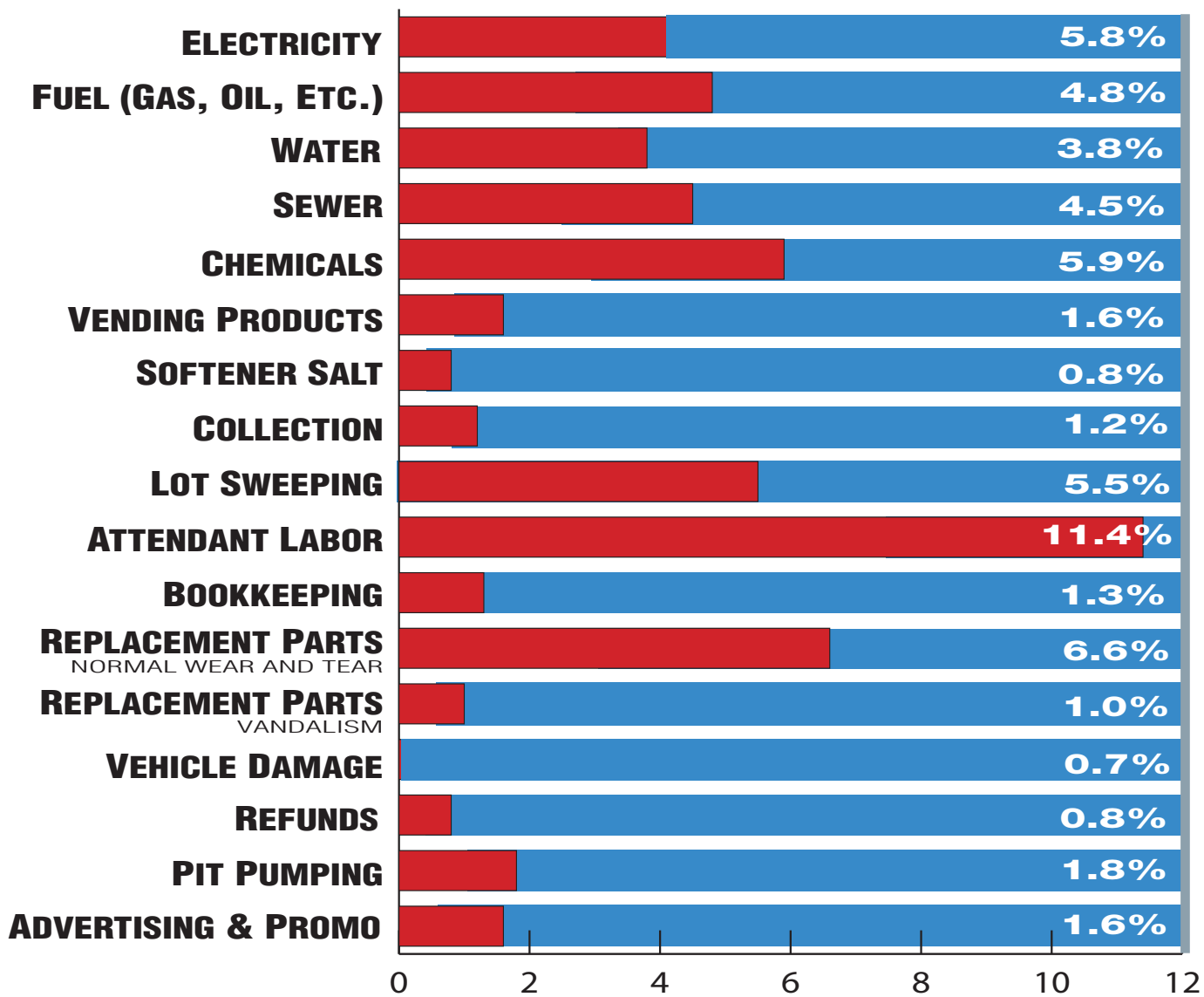
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/Self-SERVICE FACILITY

60%
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



40%
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
\$1,696



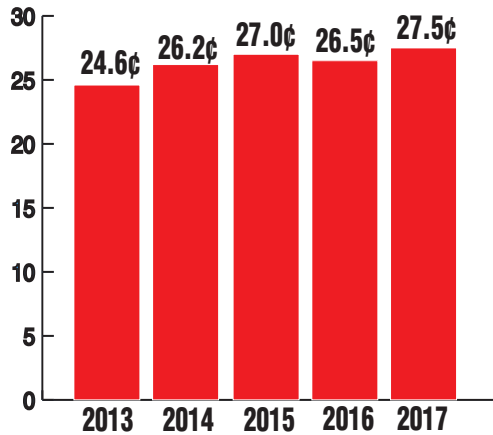
THE
AVERAGE
MONTHLY
GROSS
INCOME
PER
VACUUM
WAS
\$200



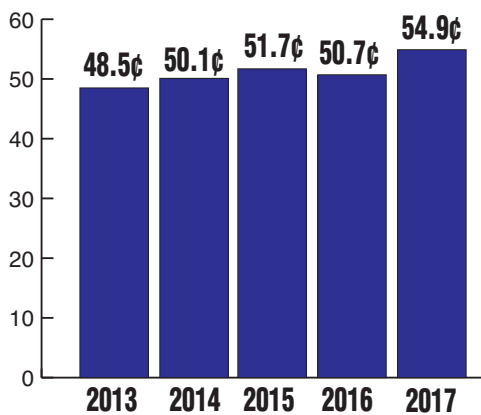
THE
AVERAGE
MONTHLY
GROSS
INCOME
FOR
VENDING
WAS
\$301



PRICE VACUUMS PRICE PER MINUTE



WASH BAYS PRICE PER MINUTE

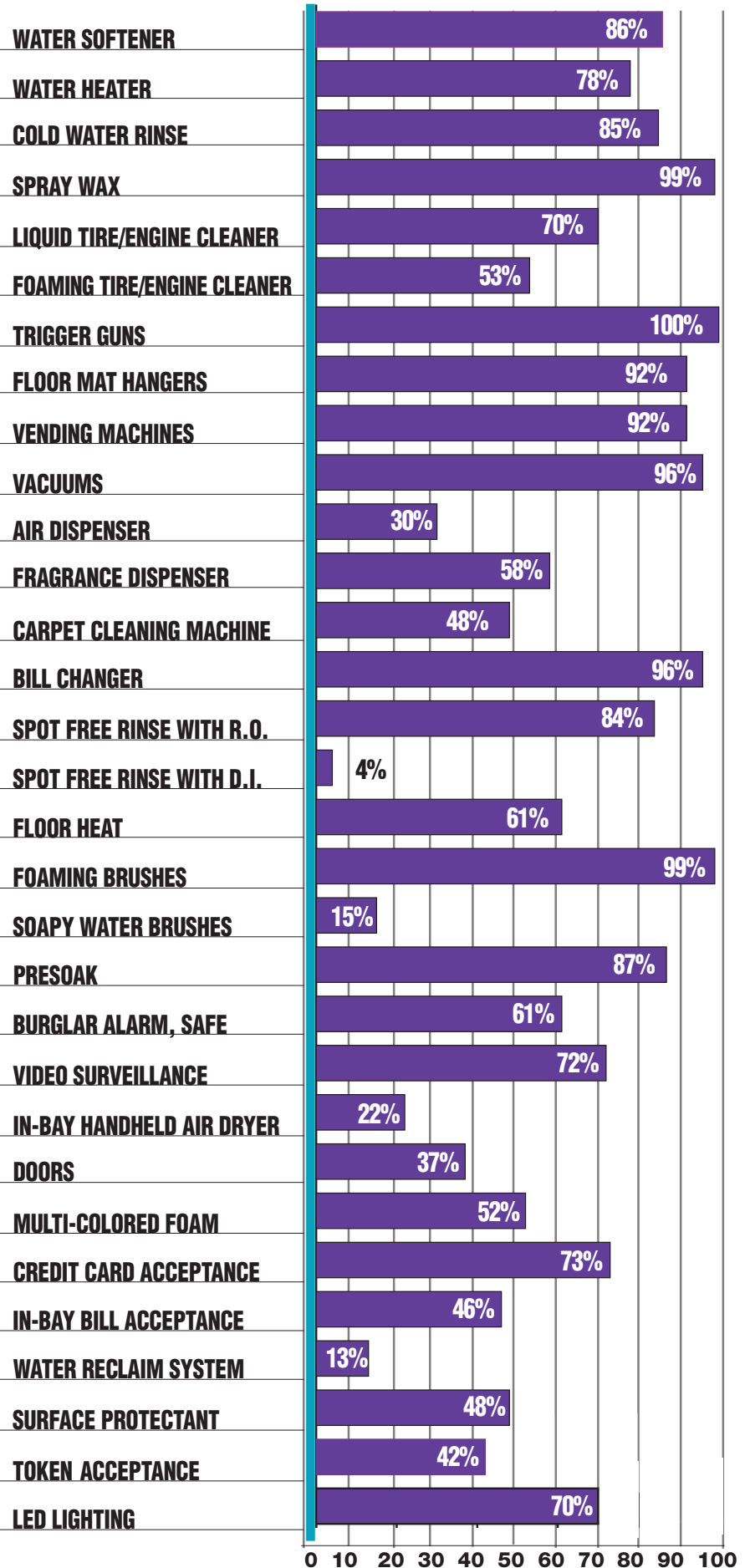


EXPRESS EXTERIOR NEARBY

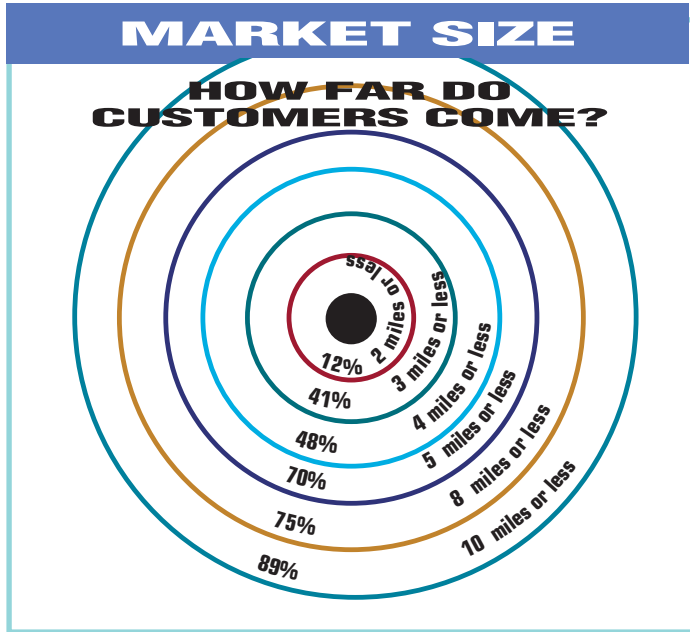
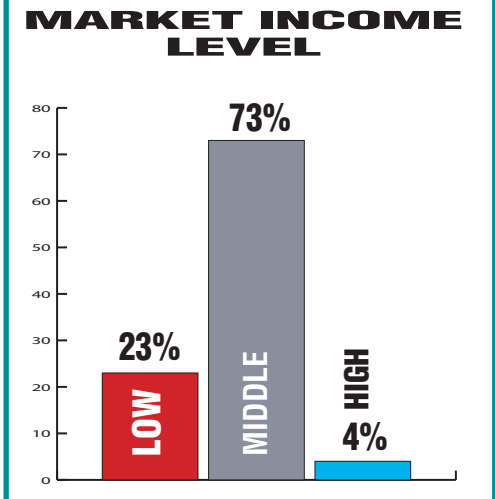
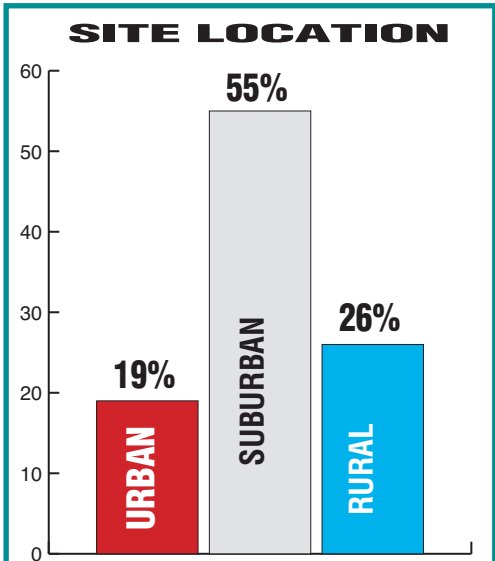
No 41%
Yes 59%

HAS HURT BUSINESS	HAS NOT HURT BUSINESS
38%	62%

CURRENT EQUIPMENT



SURVEY



AUTOMATICS

