

AutoLaundry^{news}

Results From The Auto Laundry News

2017 Self-Service Survey

The 2017 *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.

As in the past, 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 51 percent of the total response. 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 40 percent.

Revenues

In the current survey a majority of respondents are again able to report progress. Overall, 52 percent report generating greater income than one year ago. This compares to 51 percent in the previous survey who experienced improvement. However, a larger percentage of participants this year than last report a decrease in income — 19 percent versus 14 percent. Nevertheless, as can be seen in the graphic on page 51, performance, overall, has remained fairly stagnant over the past four years.

Sites with continue to outperform sites without. As was the case last year, 60 percent of the former report higher revenues, while 43 percent (38 percent last year) of sites without do so. Reported reversals are a near repetition of the survey results of two years ago with 17 percent of sites with reporting a drop in income compared to the


previous year and 23 percent of sites without doing so.

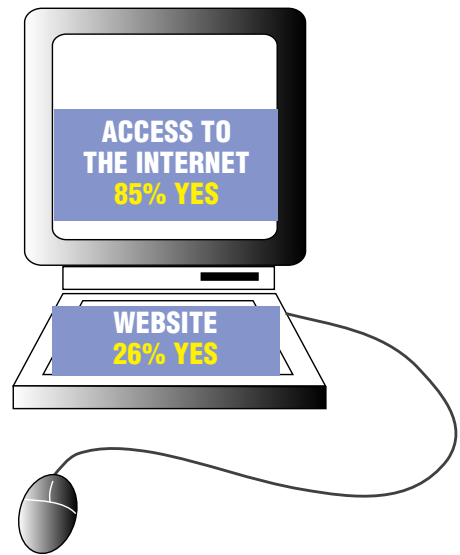
In an exception, sites without do better than sites with in respect of monthly per-vacuum income, albeit a narrow margin: \$304 versus \$297.

Equipment

Overall, 51 percent of self-service washes have in-bay automatics on site, 2 percent have full-service, and 3 percent have flex-serve. These numbers closely track the results in previous surveys. However, the percentage of locations reporting express-exterior washes on site is fluctuating some: 6 percent two years ago, 11 percent last year, and 7 percent currently.

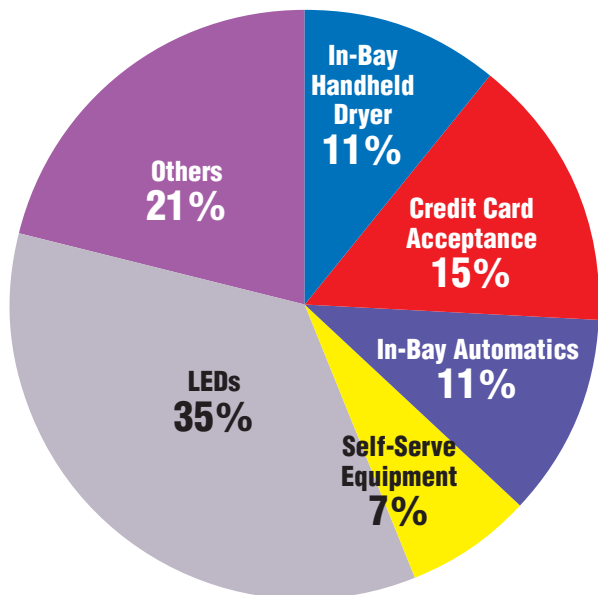
As they did the previous three years, sites with reported adding new equipment during the previous 12 months in greater numbers than did sites without — 35 percent compared to 26 percent in this year's survey. In-bay automatics, in-bay credit card acceptance, and vacuums were the most popular additions.

Forty four percent of sites with and 31 percent of sites without are planning to purchase equipment during the 12 months ahead. LED lighting is at the top of the shopping list. The graphic below shows further detail. 



NEW EQUIPMENT

40% of operators plan to add equipment in the next 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
Pacific	14	30	35	21
Mountain	34	29	23	14
Midwest	22	31	25	23
Central	38	25	21	16
South Central	23	29	25	23
Southeast	31	28	20	22
Mid-Atlantic	32	29	24	16
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

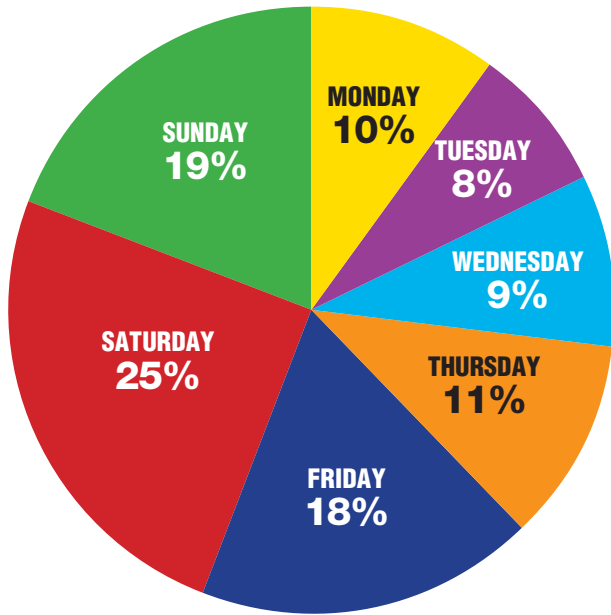
Mid-Atlantic

New Jersey-New York-Pennsylvania

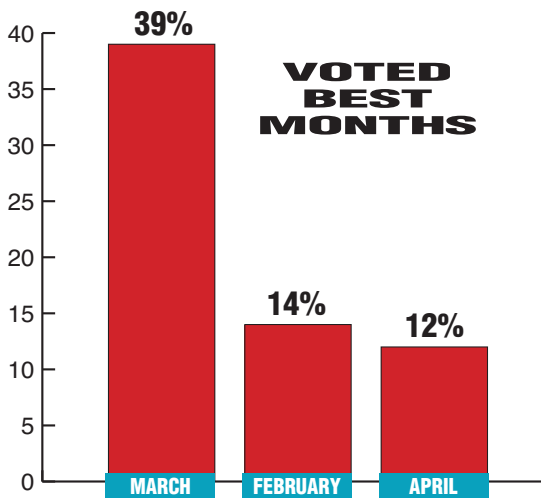
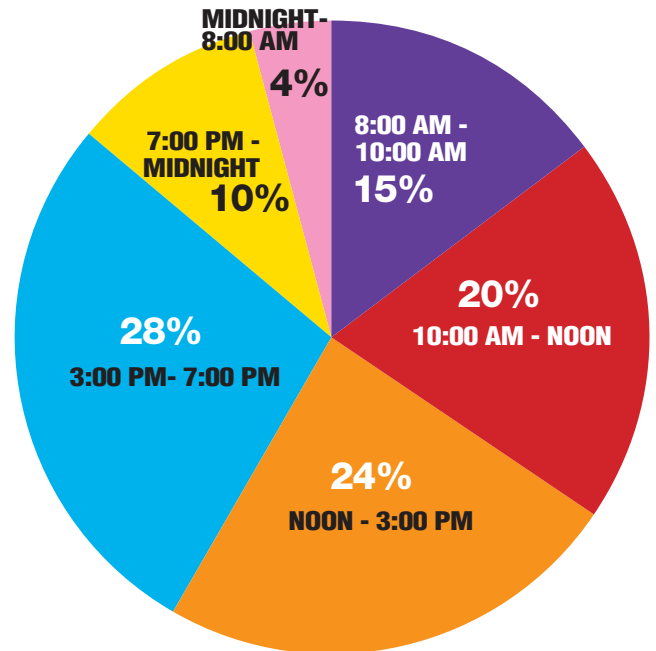
New England

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

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



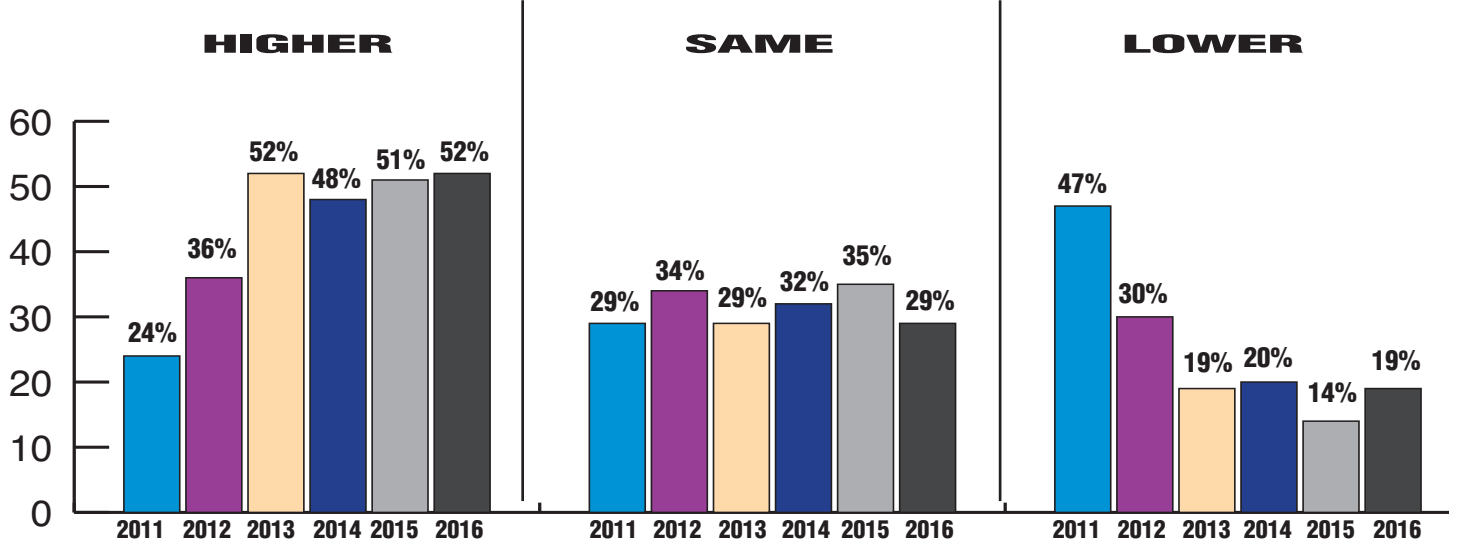
PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



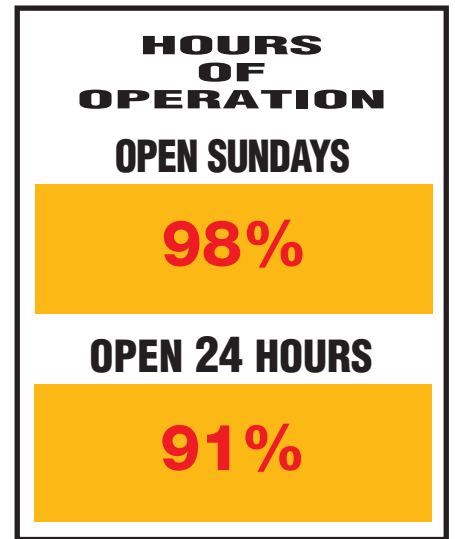
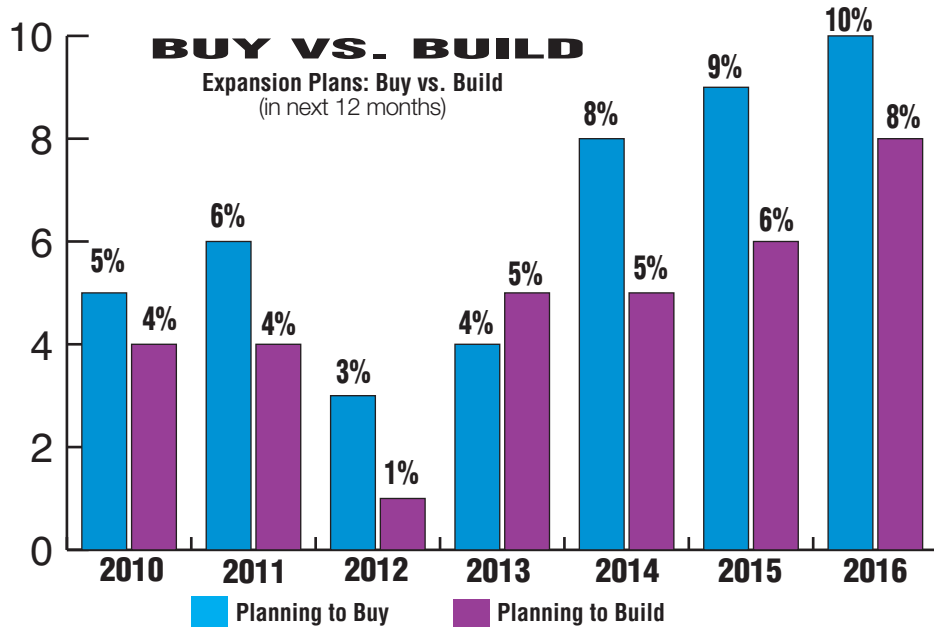
ATTENDANT

	2012	2013	2014	2015	2016
FULL-TIME	13%	15%	20%	18%	16%
PART-TIME	42%	38%	39%	51%	45%
NONE	45%	47%	41%	31%	39%

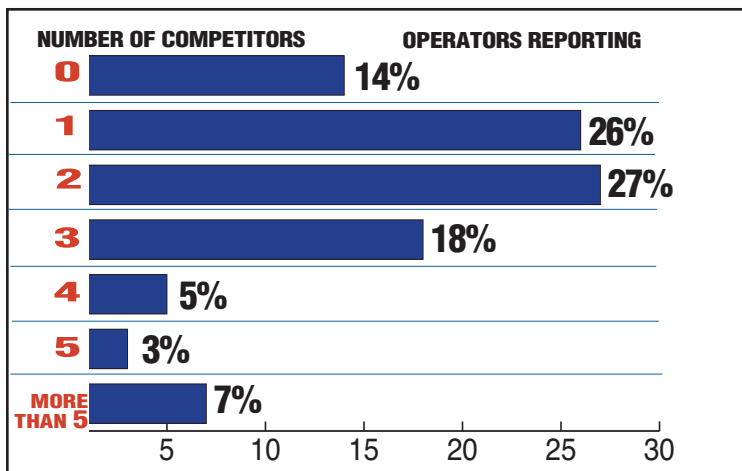
INCOME (COMPARED TO PREVIOUS YEAR)



EXPANSION PLANS

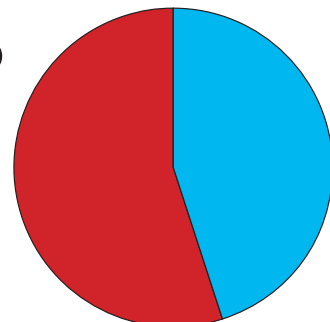


COMPETING SELF-SERVE IN AREA



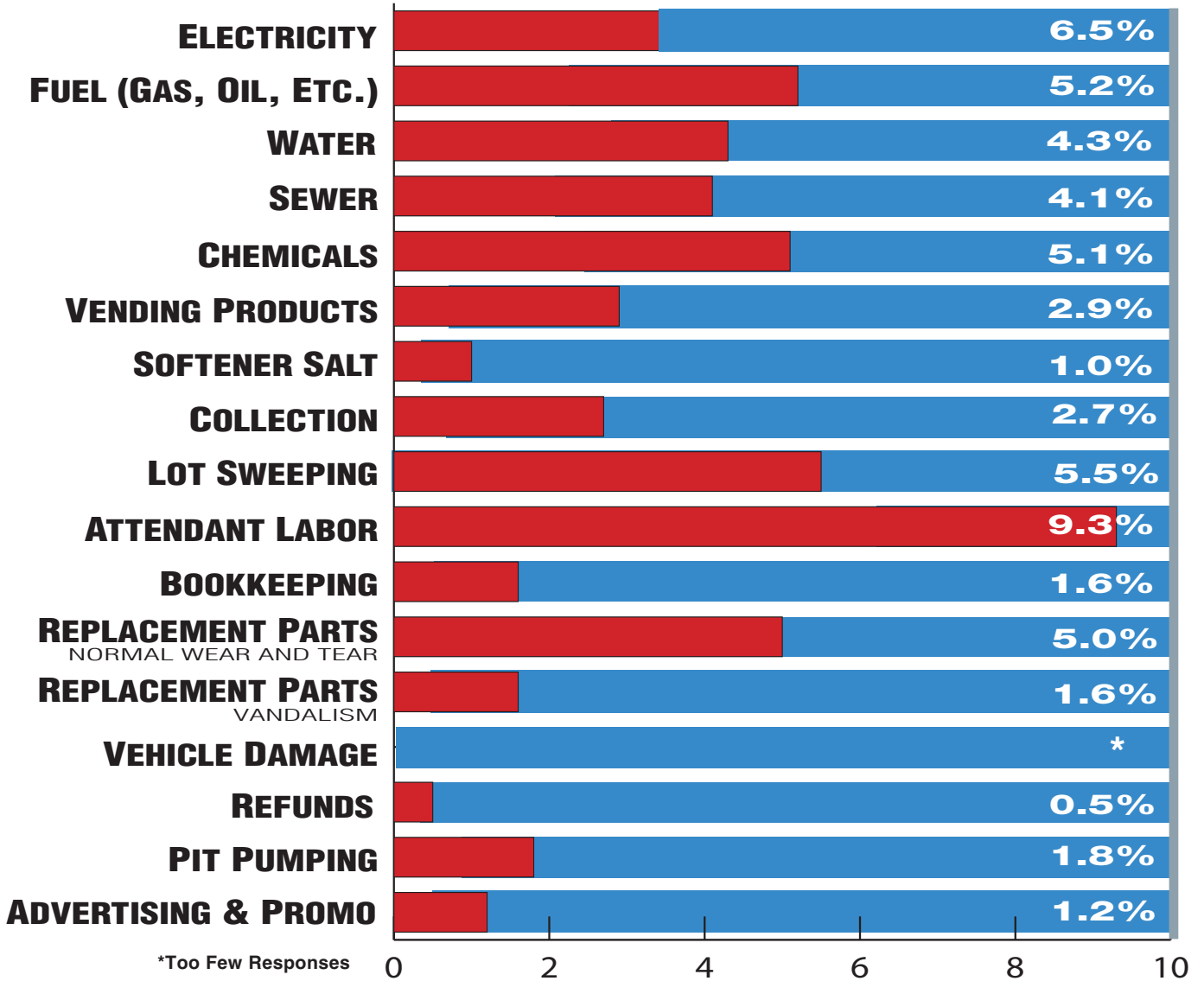
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/Self-SERVICE FACILITY

55%
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

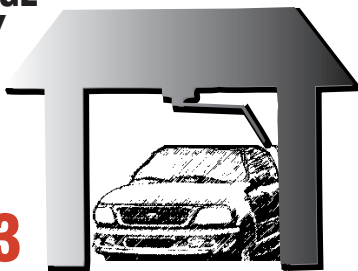


45%
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



THE AVERAGE
MONTHLY
GROSS
INCOME
PER BAY
WAS
\$1,623



THE
AVERAGE
MONTHLY
GROSS
INCOME
PER
VACUUM
WAS
\$299

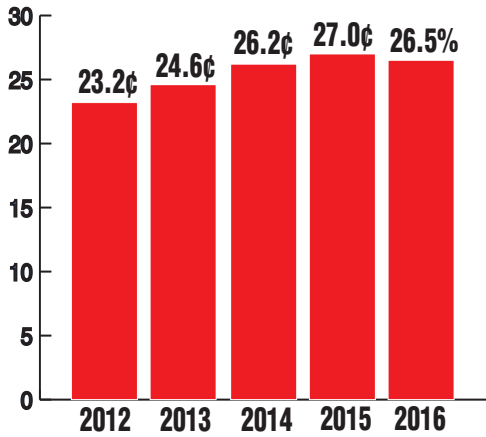


THE
AVERAGE
MONTHLY
GROSS
INCOME
FOR
VENDING
WAS
\$398

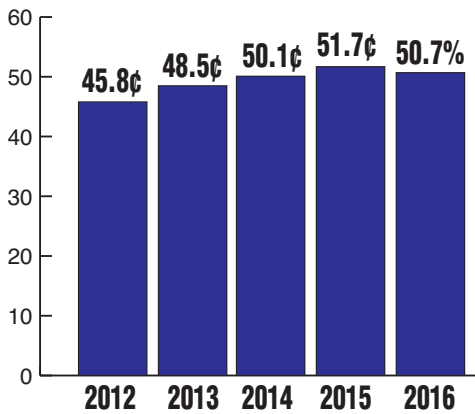


PRICE

VACUUMS PRICE PER MINUTE



WASH BAYS PRICE PER MINUTE

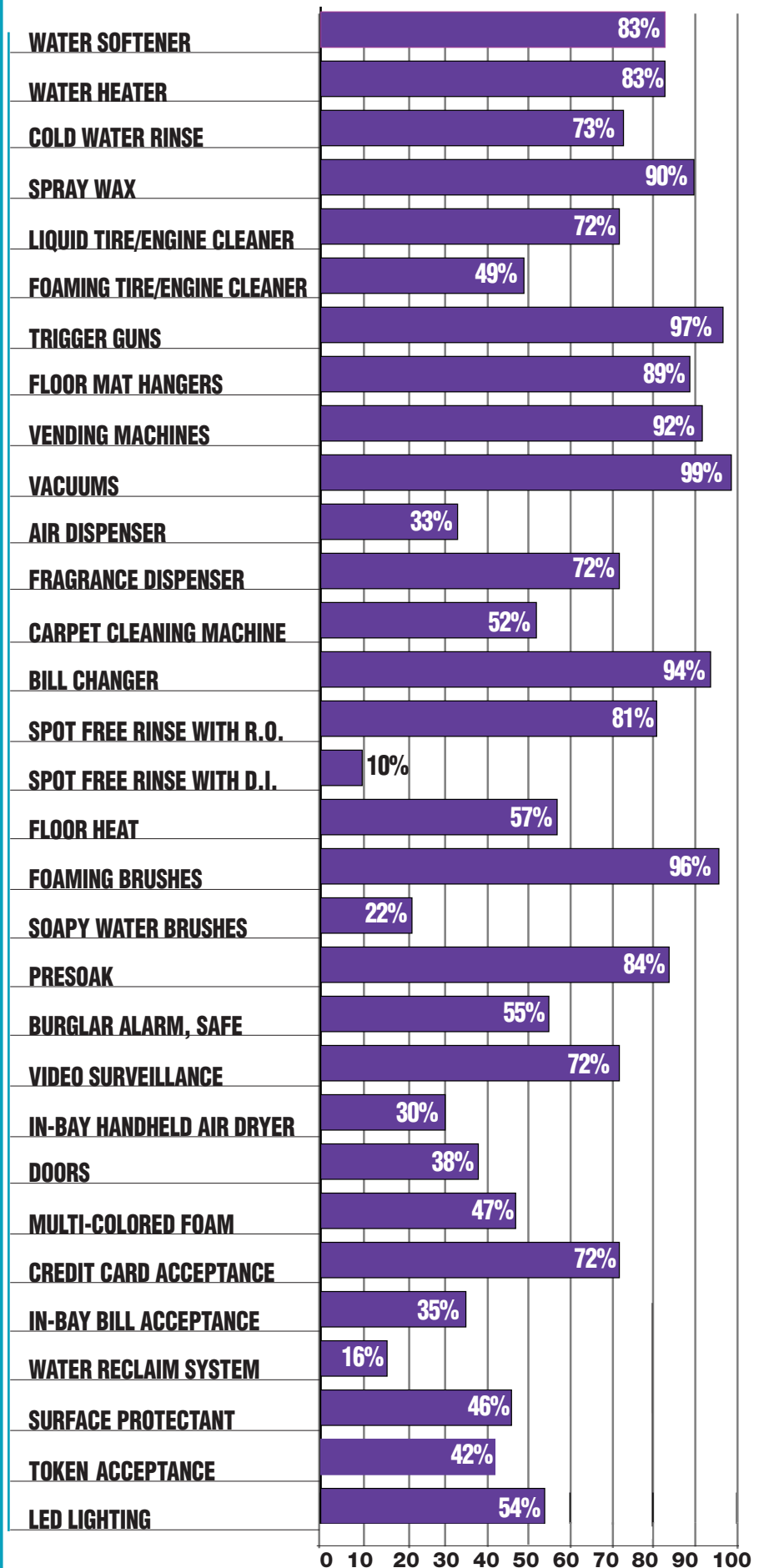


EXPRESS EXTERIOR NEARBY

No 42%
Yes 58%

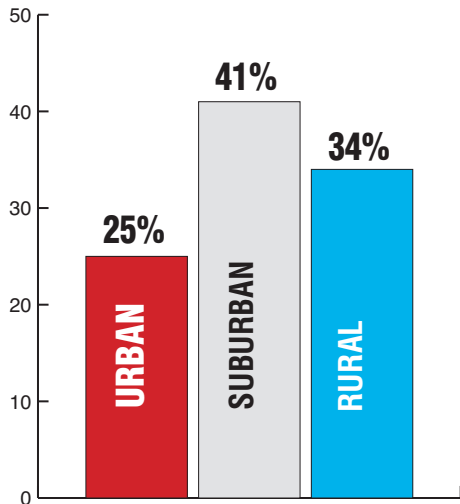
HAS HURT BUSINESS	HAS NOT HURT BUSINESS
43%	57%

CURRENT EQUIPMENT

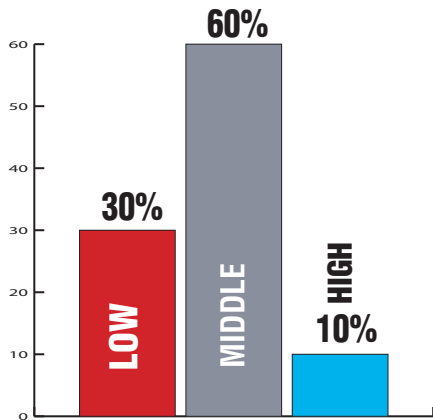


SURVEY

SITE LOCATION

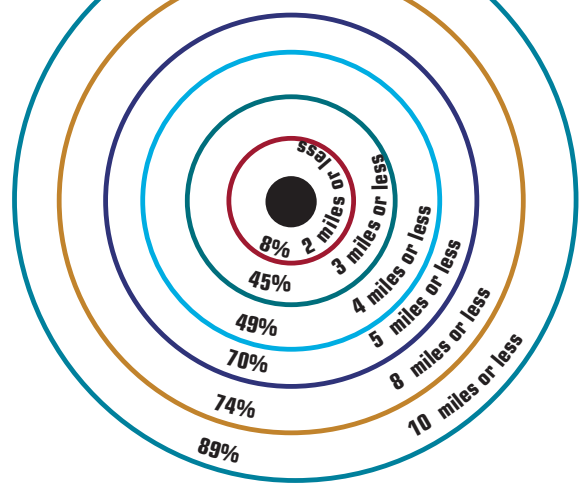


MARKET INCOME LEVEL



MARKET SIZE

HOW FAR DO CUSTOMERS COME?



AUTOMATICS

