

AutoLaundry^{news}

SURVEY

Results From The Auto Laundry News 2018

Full/Flex Survey

The 2018 *Auto Laundry News* Full/Flex Survey was conducted through a mailing of questionnaires to a random selection of our subscribers who own and operate conveyor car wash businesses other than exterior sites. The information presented in this report results from an analysis of data provided by respondents from locations throughout the United States.

Full-Service vs. Flex-Service Sites

For purposes of comparison, survey responses from full-service sites are on occasion tabulated separately from flex-service responses. Full-service participants make up 56 percent of the total, with flex-service sites accounting for 44 percent. This compares to last year's split of 65/35. The year before last, the split was 72/28. Might we have the makings of a trend?

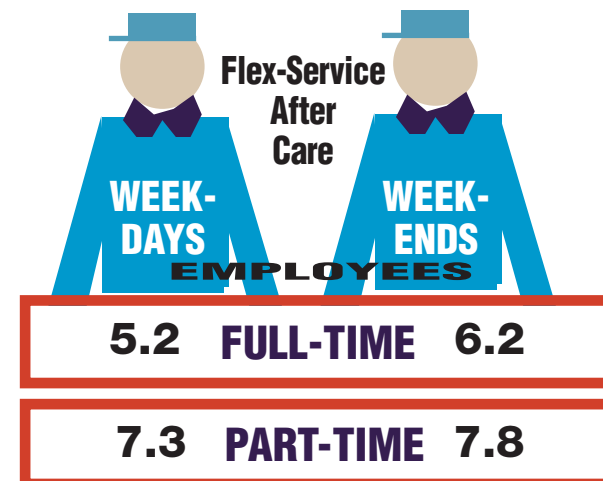
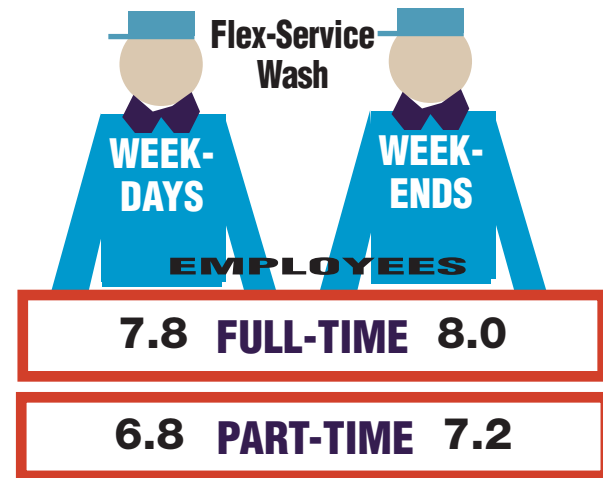
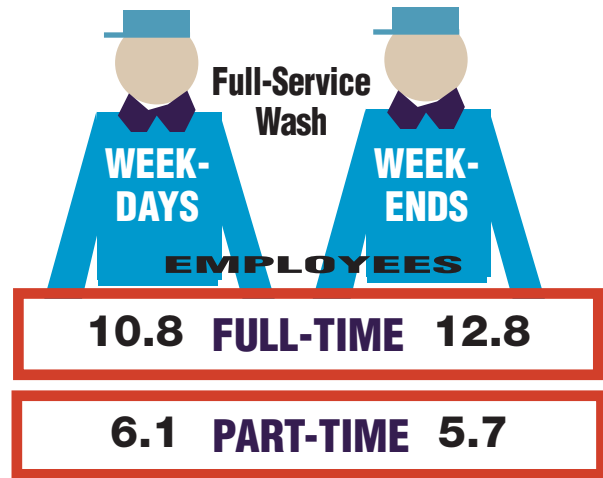
At 53 percent, fewer flex-service sites than one might expect claim to operate freestanding after-care centers, while only 20 percent report doing their vacuuming there. A further 60 percent, however, vacuum after the wash. Pre-wash vacuuming still dominates in the full-service category, with 84 percent of these respondents reporting this practice. A self-serve option should be more prevalent at flex-serve sites than the 13 percent who offer this facility. At 16 percent, a greater proportion of full-service sites has self-service bays on the property.

Revenues

Overall, 46 percent of respondents report increased income compared to the previous year, the exact same proportion that did so last year. The graphic on page 56 provides a three-year perspective. As was the case last year, flex-service sites outperformed full-service sites, but the gap has narrowed. In the current survey, 53 percent of flex-service sites report income growth (82 percent last year), while 39 percent (26 percent last year) of full-service participants report advances. Last year, not a single flex-service site reported declining revenues. This year, 20 percent do so. On the full-service side, 39 percent of respondents report reversals, pretty close to the 42 percent who suffered setbacks last year.

Future

Flex-service operators (27 percent) are more than twice as likely as full-service operators (11 percent) to expand in the next 12 months. The former's plans are evenly split between flex and exterior, while the latter favors full service and exterior, also in even numbers. 📺



COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	19%
1	13%
2	16%
3	19%
4	10%
5	10%
MORE THAN 5	13%

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	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	12	13	12	11	18	20	14
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	*	*	*	*	*	*	*
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	15	10	15	15	19	19	7
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	9	11	15	20	20	15
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	10	11	11	11	27	18	12
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	5	10	9	13	29	28	8
Mid-Atlantic New Jersey-New York-Pennsylvania	10	9	10	10	23	26	13
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	7	5	10	18	22	23	15

* Too Few Responses

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	17	28	33	22
Mountain	*	*	*	*
Midwest	32	23	23	22
Central	42	21	18	19
South Central	23	28	25	24
Southeast	35	20	19	26
Mid-Atlantic	36	27	19	18
New England	40	23	18	20

* Too Few Responses NOTE: Some results total more than 100 due to rounding

OPEN SUNDAY

Full Service	Flex Service
89%	87%

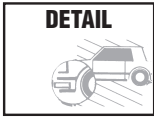
OPEN 24 HOURS

Full Service	Flex Service
5%	0%

	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME	AVERAGE MONTHLY IMPULSE SALES
Full Service	32,100	64,600	\$1,926
Flex Service	27,800	61,400	\$1,750

EXTRA SERVICES OFFERED

Average Price % Of Operators Offering Services



FULL	\$116.25	68%
FLEX	\$141.00	60%



FULL	\$55.99	63%
FLEX	\$60.00	47%



FULL	\$36.00	5%
FLEX	\$36.25	47%



FULL	\$40.00	58%
FLEX	\$51.67	67%



FULL	\$16.67	47%
FLEX	*	



FULL	\$16.67	47%
FLEX	*	



FULL	\$64.80	63%
FLEX	\$62.60	53%

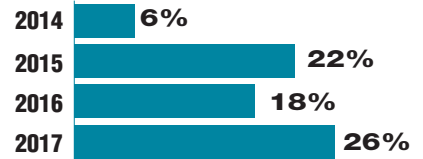


FULL	\$88.50	53%
FLEX	\$88.20	53%

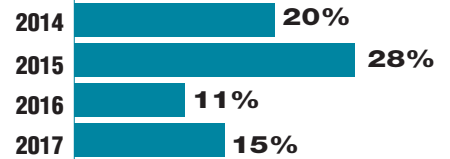
* Insufficient Responses

EXTRA ON-LINE SERVICES SOLD

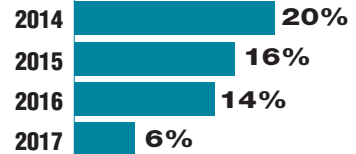
10% TO 20% OF CARS WASHED



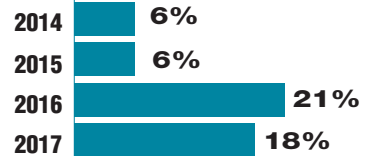
21% TO 30% OF CARS WASHED



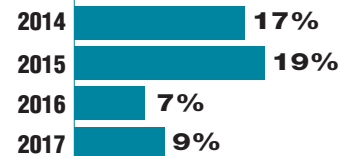
31% TO 40% OF CARS WASHED



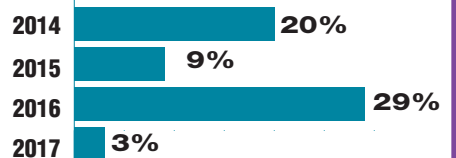
41% TO 50% OF CARS WASHED



51% TO 60% OF CARS WASHED

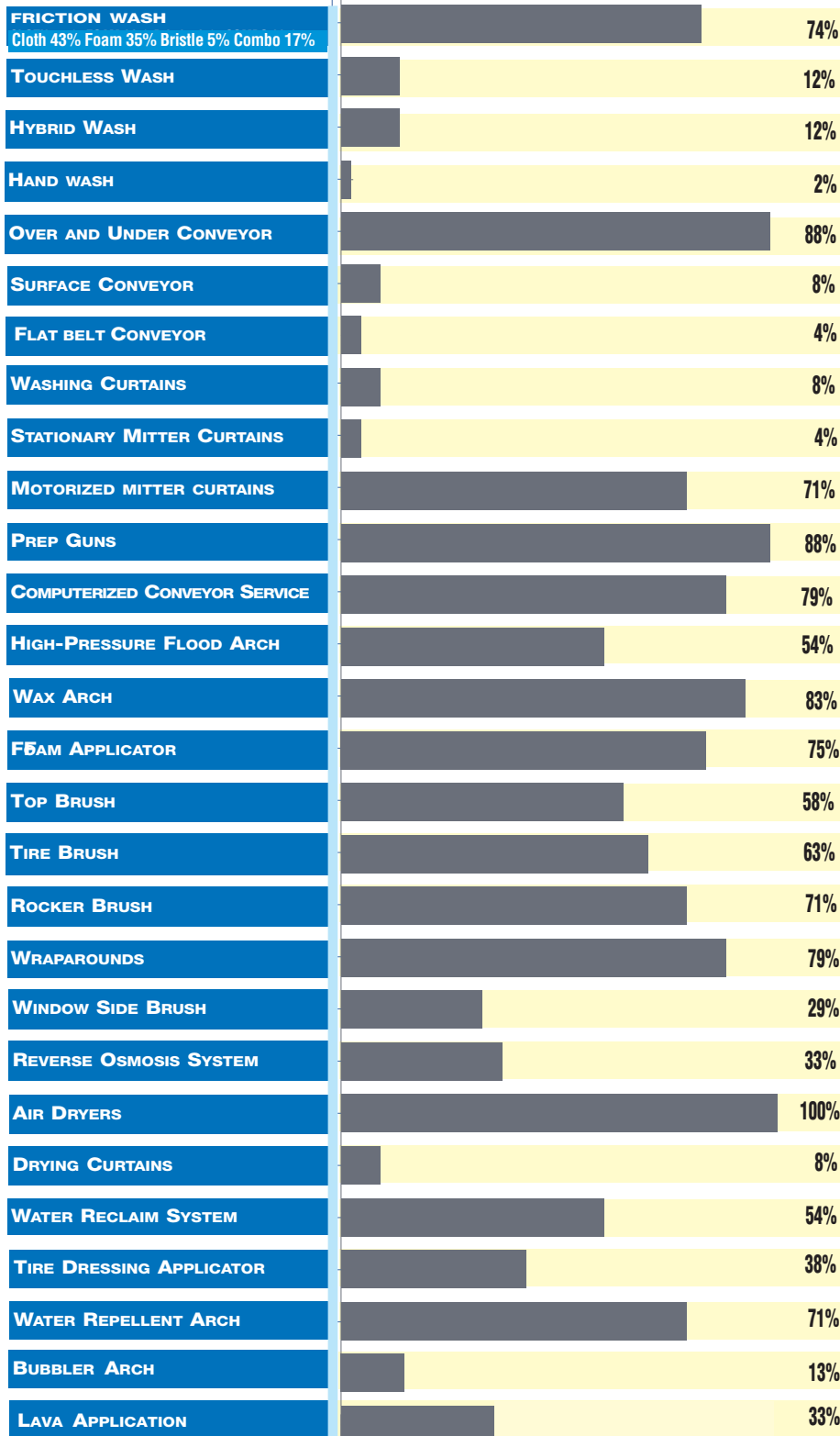


OVER 60% OF CARS WASHED

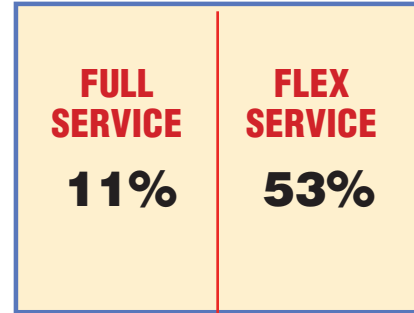


SURVEY

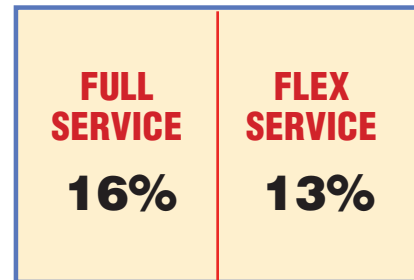
PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



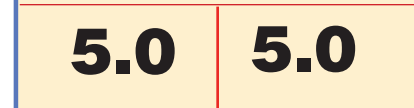
OPERATE FREESTANDING AFTER-CARE CENTER



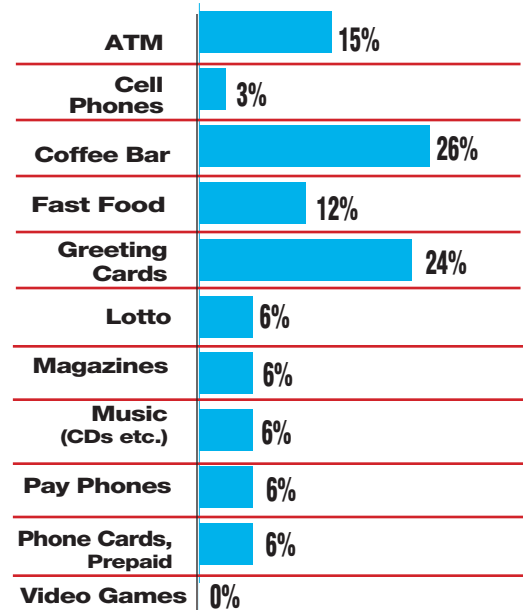
OPERATE COIN-OP BAYS ON SITE



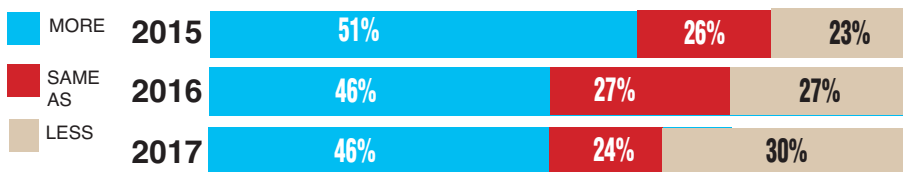
AVERAGE NUMBER OF BAYS

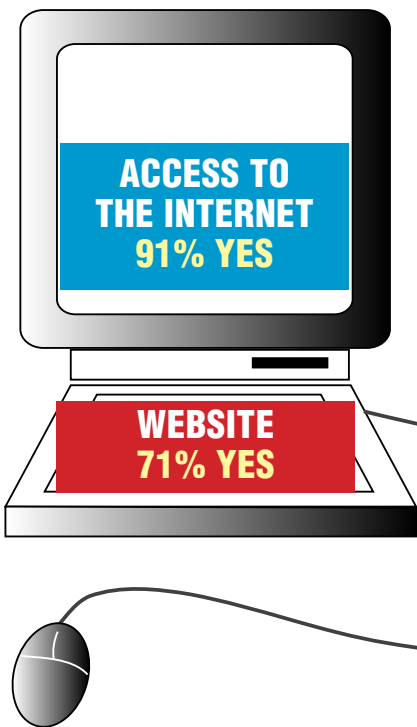
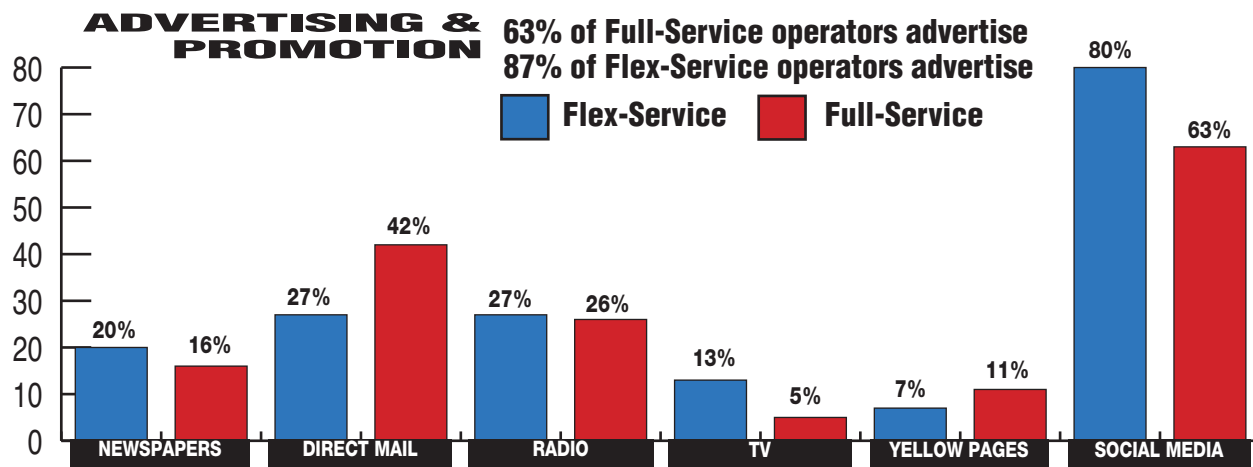


NON-AUTO PROFIT CENTERS ON SITE



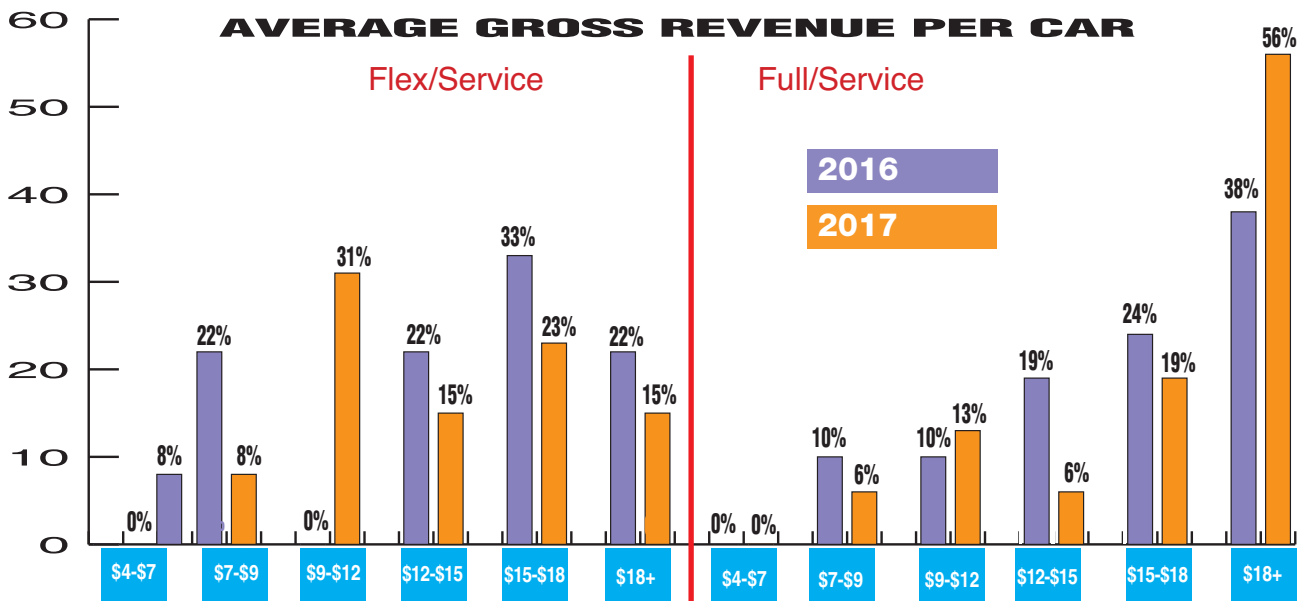
INCOME: CURRENT YEAR VS. PREVIOUS YEAR





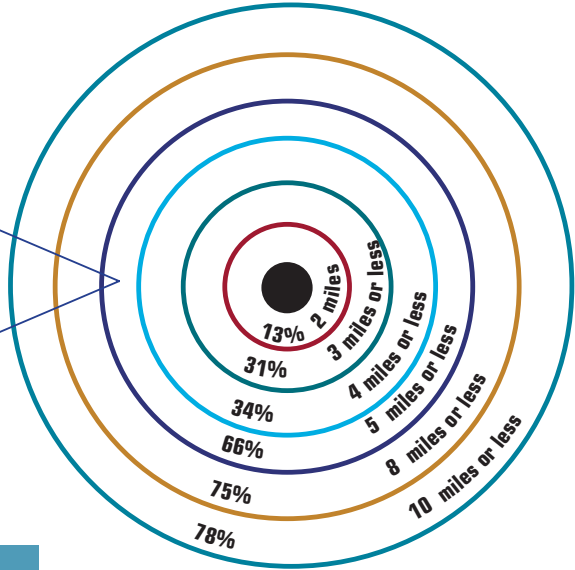
OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)

OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)	
RENT	14.4%
EQUIPMENT & BLDG. MAINTENANCE	5.5%
CHEMICALS	5.0%
LABOR	36.8%
UTILITIES	7.1%
INSURANCE	3.9%
ADVERTISING & PROMOTION	2.0%
EQUIPMENT ON LEASE	5.0%
CUSTOMER CLAIMS	0.6%



SURVEY

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



LABOR COSTS

