

AutoLaundry^{news}

Results From The Auto Laundry News 2011 Self-Service Survey

The 2011 *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 130 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 47 percent of the total response.

Revenues

Continued improvement — that summarizes the results of the current survey. More sites are doing better; fewer sites are doing worse. For the first time in three years, fewer than half of respondents (49 percent), overall, report declining income compared to the previous year. Perhaps more encouraging is the 27 percent of survey participants who were able to report income growth — a healthy step up from 17 percent who reported increased income last year.

Sites with continue to outperform sites without. Thirty-six percent of the former (22 percent last year) report higher revenues, while 19 percent (13 percent last year) of sites without do so. While 43 percent of sites with report declining income, 54 percent of sites without report such reversals. Sites with report higher monthly income per wand wash bay than sites without do: \$1,379 versus \$1,160.

Equipment

In last year's survey, 28 percent of participants reported plans to purchase new equipment. They all came through. In the current survey, 28

percent of participants, overall, report having purchased additional equipment for their sites during the last 12 months. That's a considerable advance from the 17 percent who did so in each of the previous two years. The most popular addition was credit card acceptance. Having topped the list for the past two years, wand-bay (in-bay handheld) dryers managed a three-way tie for second place with in-bay automatics and vending (see the graphic on this page). At 36 percent of respondents, sites with were more likely to add equipment than sites without (20 percent).

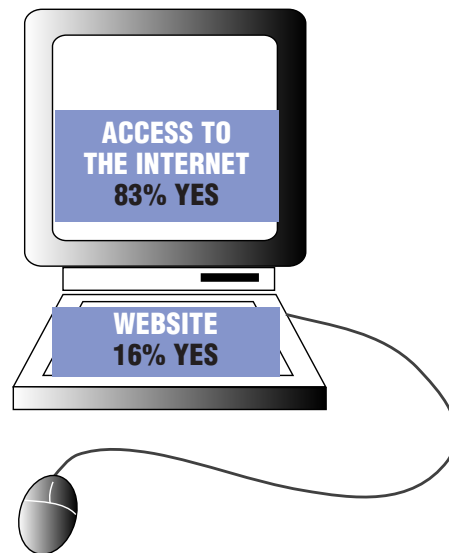
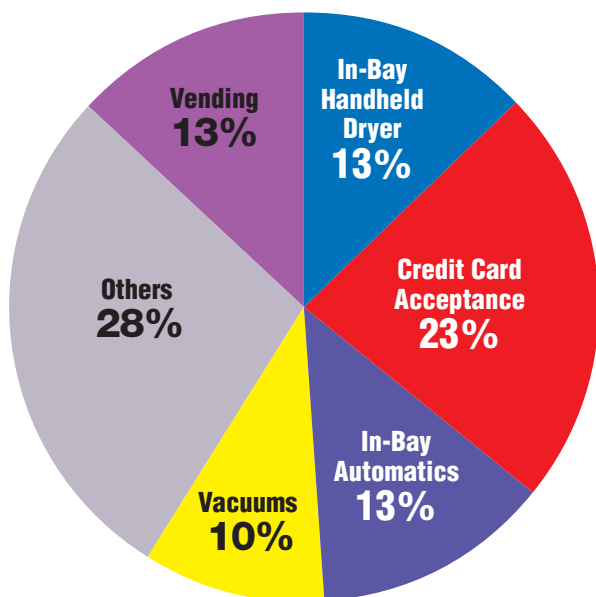
A fairly consistent proportion of participants (29 percent) are planning some equipment purchases during this year. Credit card acceptance remains most popular with a 20 percent share of planned purchases. Wand-bay dryers follow at 14 percent, while in-bay automatics and vacuums round out the top four with 10 percent and 8 percent respectively.

The Future

After a spurt in enthusiasm for expanding their car wash portfolios last year, participants have retreated to the buy/build levels of two years ago. The preference for buying over building, first seen three years ago, continues, with 5 percent planning to buy and 4 percent planning to build. 📺

NEW EQUIPMENT

27% of operators added equipment in the past 12 months



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



PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	21	28	33	18
Mountain	27	25	28	20
Midwest	30	27	23	20
Central	32	27	23	18
South Central	24	30	27	19
Southeast	30	31	16	23
Mid-Atlantic	44	23	16	18
New England	40	23	22	15

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

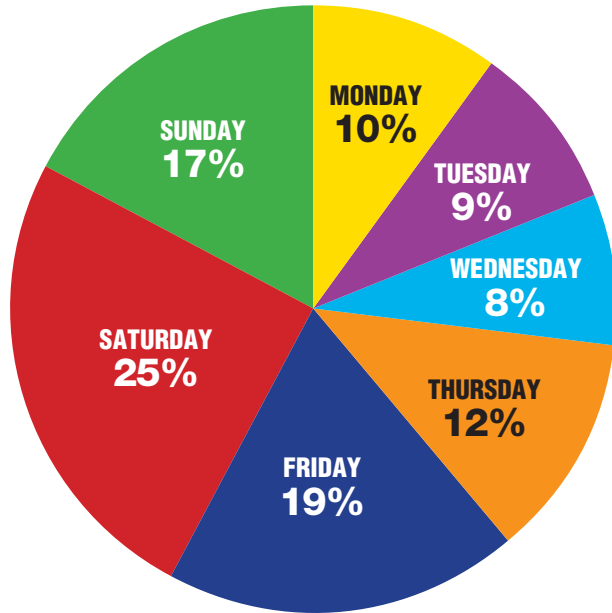
Mid-Atlantic

New Jersey-New York-Pennsylvania

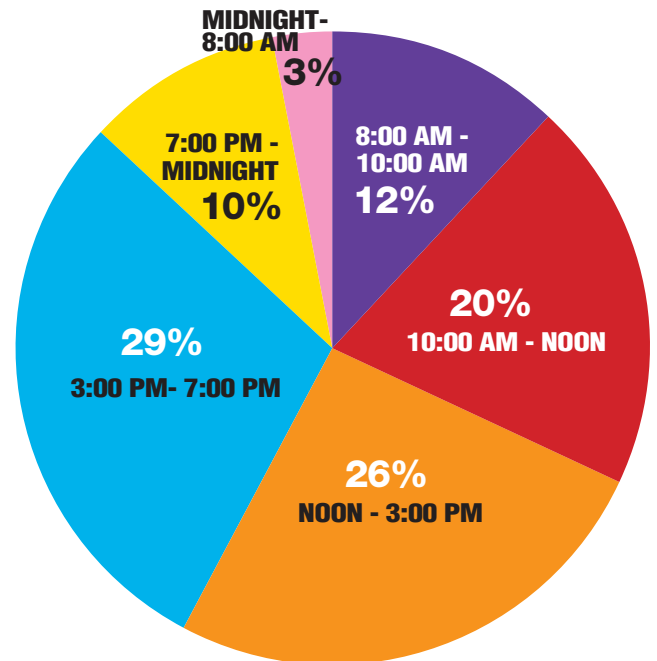
New England

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

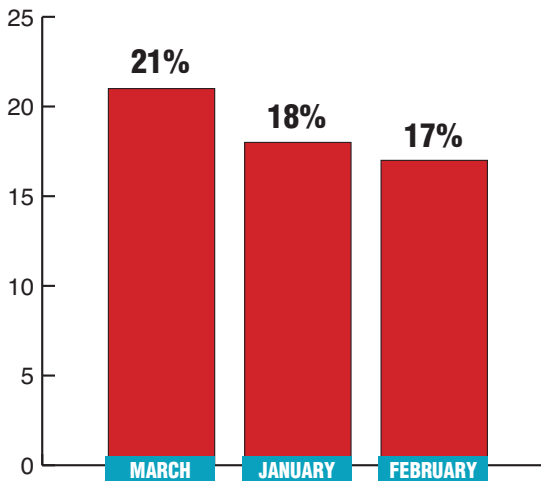
PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



VOTED BEST MONTHS

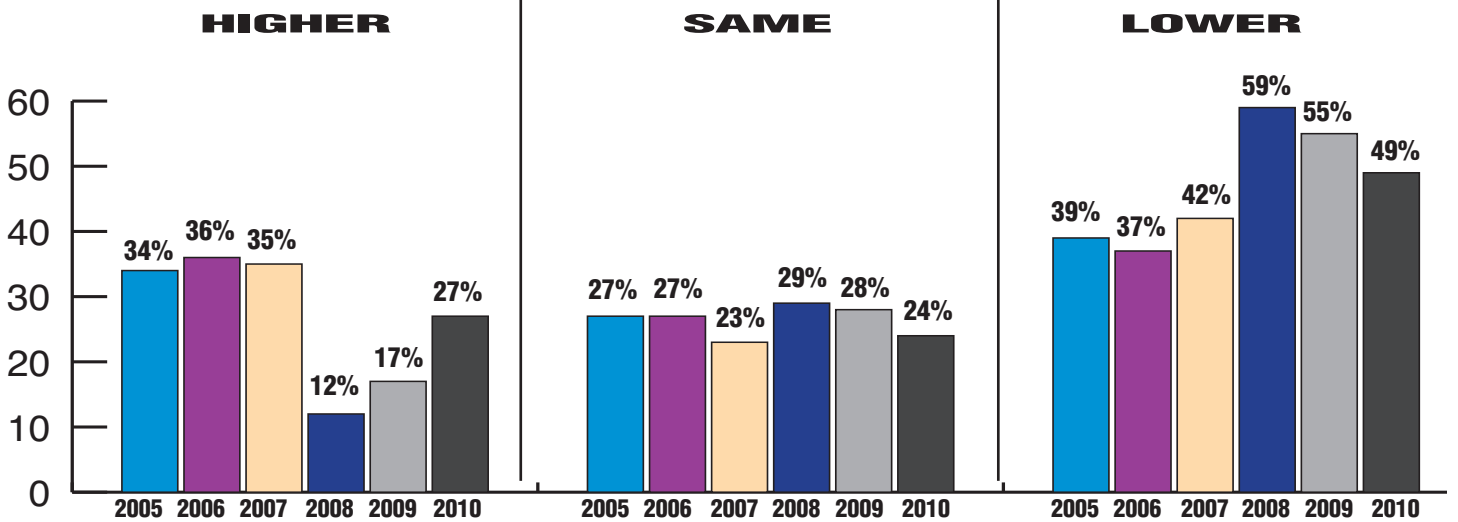


ATTENDANT

	2006	2007	2008	2009	2010
FULL-TIME	17%	23%	7%	16%	14%
PART-TIME	42%	43%	42%	41%	36%
NONE	41%	34%	51%	43%	50%

SURVEY

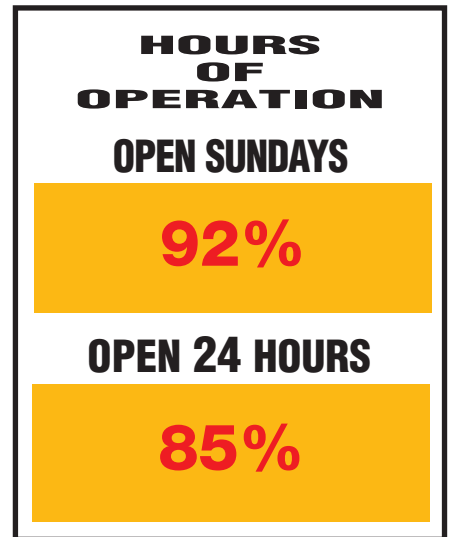
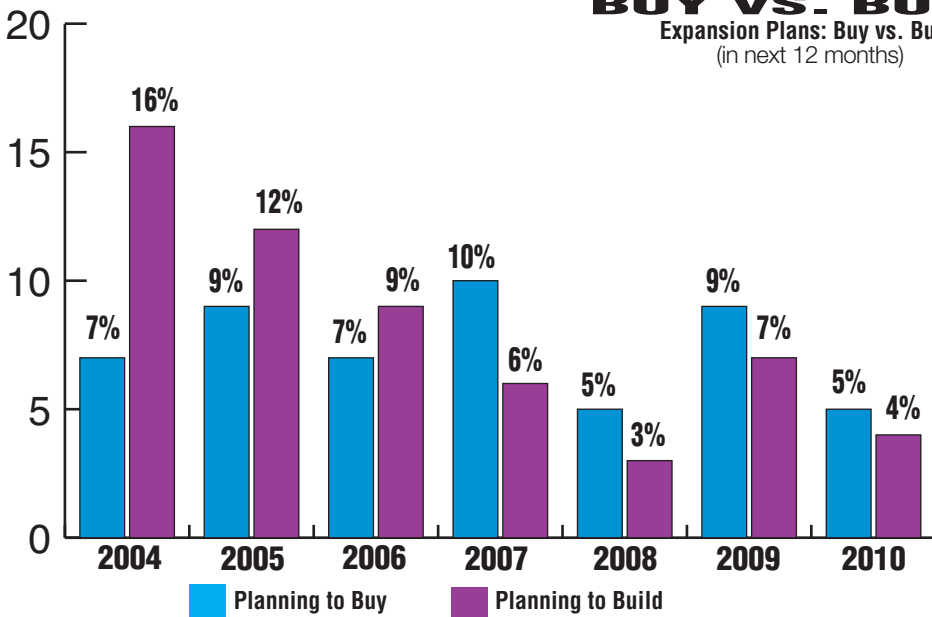
INCOME (COMPARED TO PREVIOUS YEAR)



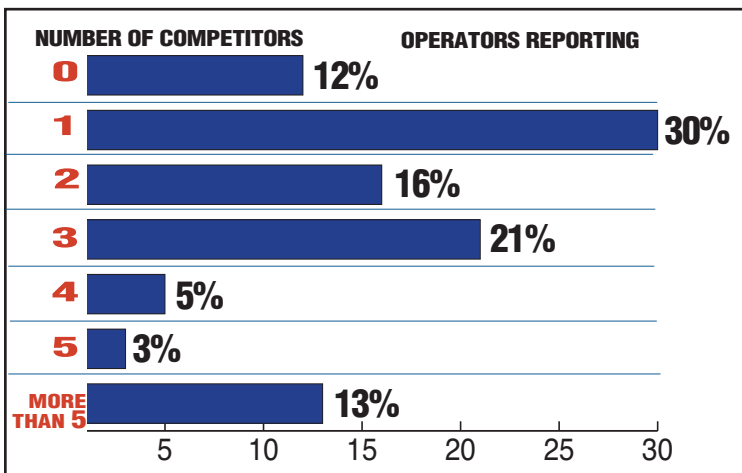
EXPANSION PLANS

BUY VS. BUILD

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

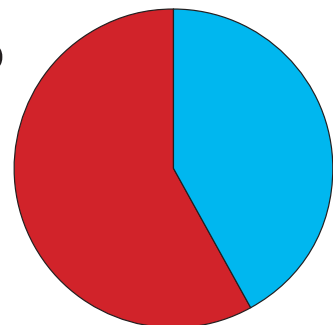


COMPETING SELF-SERVE IN AREA



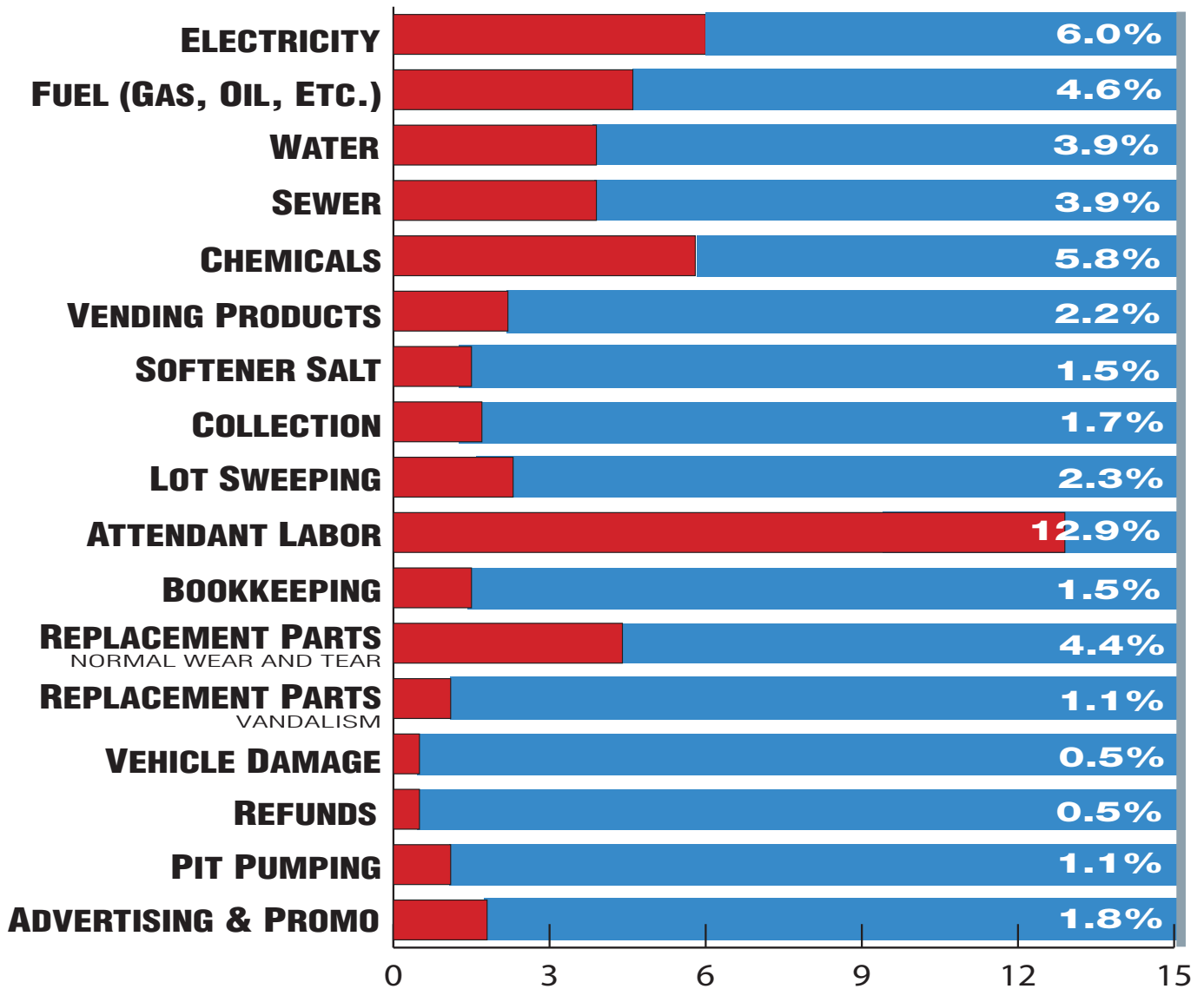
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/Self-SERVICE FACILITY

58%
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



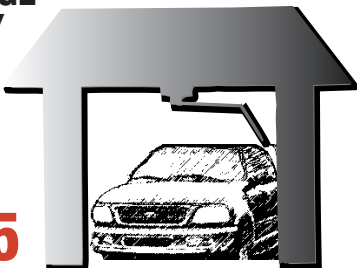
42%
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



THE AVERAGE MONTHLY GROSS INCOME PER BAY WAS

\$1,275



THE AVERAGE MONTHLY GROSS INCOME PER VACUUM WAS

\$184



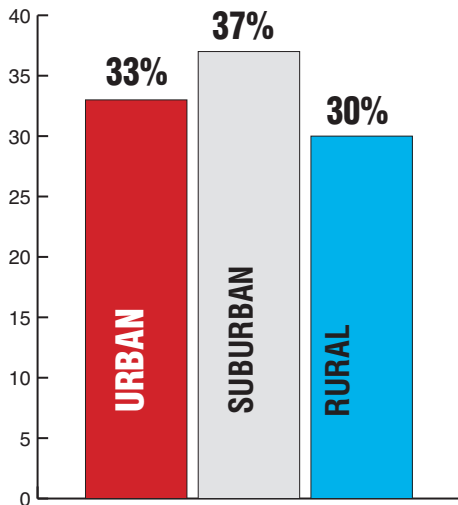
THE AVERAGE MONTHLY GROSS INCOME FOR VENDING WAS

DROP-SHELF: \$260
GLASS FRONT: \$469

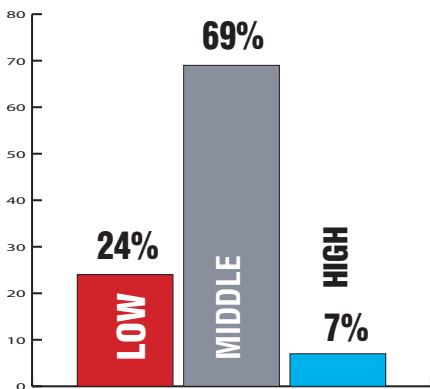


SURVEY

SITE LOCATION

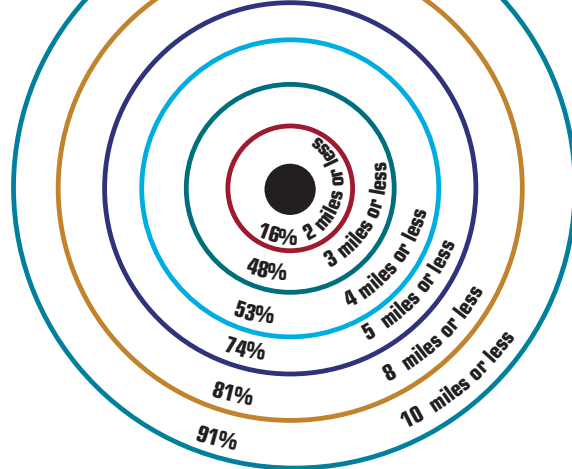


MARKET INCOME LEVEL

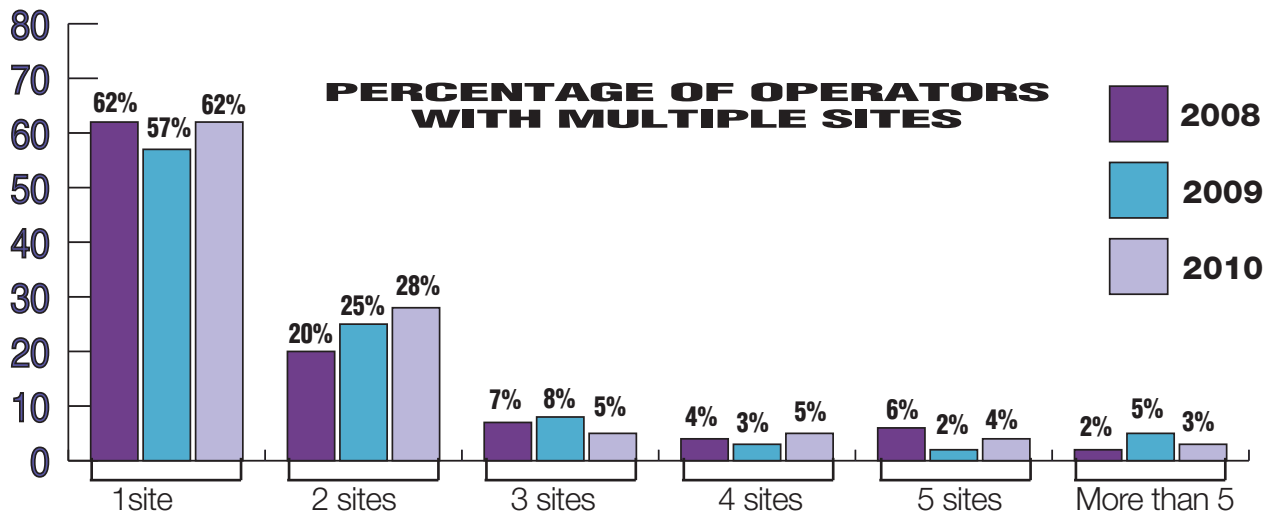
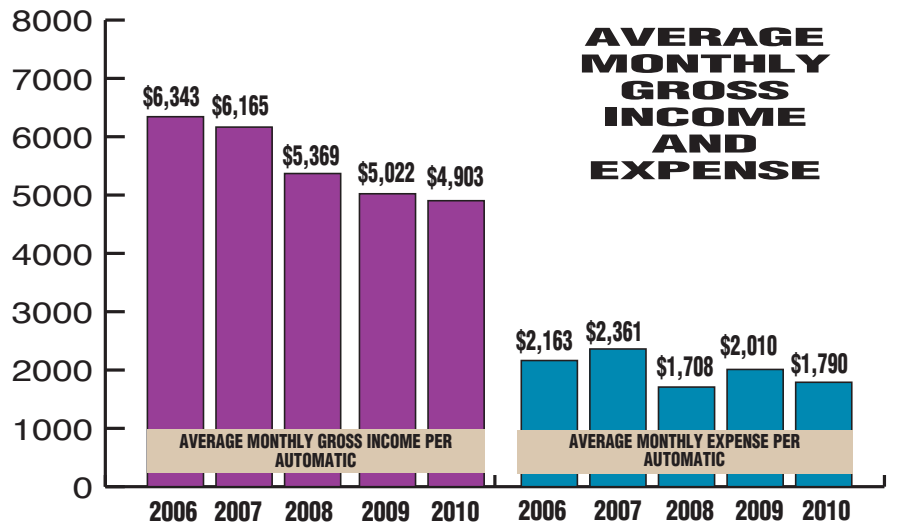


MARKET SIZE

HOW FAR DO CUSTOMERS COME?

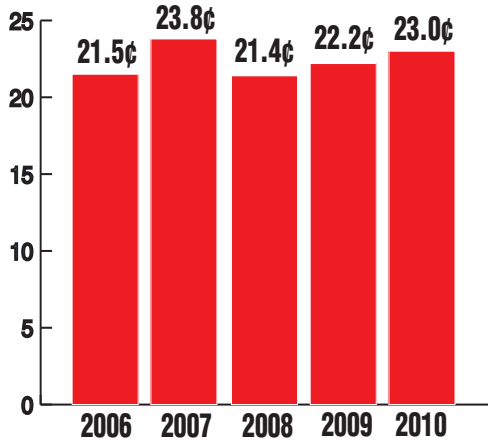


AUTOMATICS

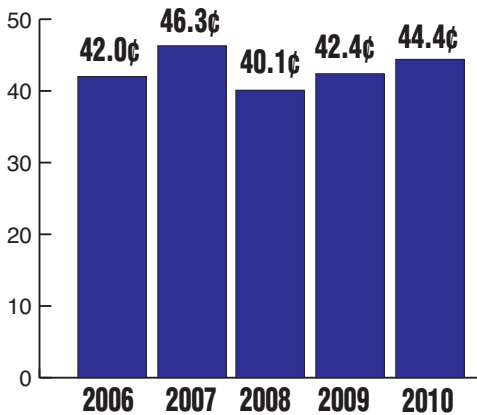


PRICE

VACUUMS PRICE PER MINUTE



WASH BAYS PRICE PER MINUTE



EXPRESS EXTERIOR NEARBY

No 53%
Yes 47%

HAS HURT BUSINESS	HAS NOT HURT BUSINESS
59%	41%

CURRENT EQUIPMENT

