AutoLaundry news
THE VOICE OF THE CAR CARE INDUSTRY

Results from the Auto Laundry News

SELF-SERVICE SURVEY 2014

Results From The Auto Laundry News

2014 Self-Service Survey

The 2014 *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 138 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 50 percent of the total response.

Revenues

For the first time since 2000, a majority of survey participants, overall, report increased income compared to the previous year. Fourteen years ago, 55 percent of respondents reported progress; currently, 52 percent do so. It has been a long and steady climb from the low point in 2008 when only 12 percent of survey participants reported income growth. At 19 percent, the proportion of respondents reporting declining revenues is at its lowest level since 1998 when 17 percent reported reversals.

Sites with continue to outperform sites without: 60 percent of the former (39 percent last year) report higher revenues, while 43 percent (34 percent last year) of sites without do so. Sites with generate $1,533 monthly income ($1,532 last year) per wand wash bay compared to $1,288 for sites without ($1,209 last year). Sites with report average revenue of $267 per vacuum, while sites without collect $234.

Equipment

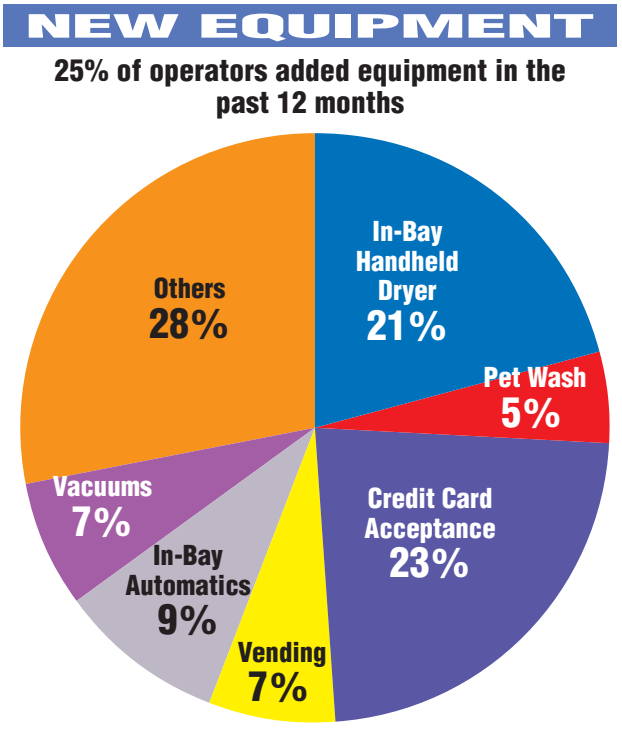
Overall, 50 percent of self-service washes have in-bay automatics on site, 3 percent have full-service, 4 percent have flex-serve, and 7 percent have express-exterior washes.

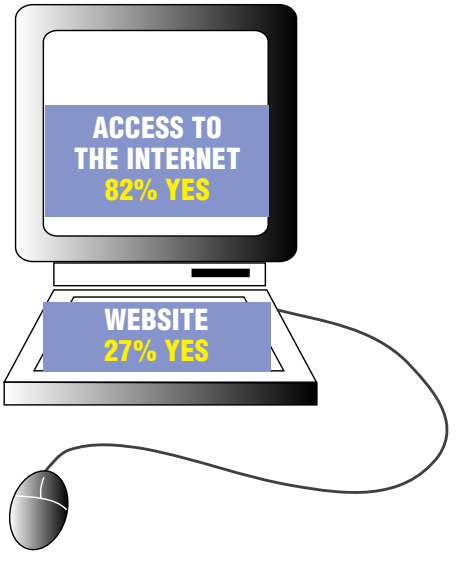
Compared to sites without, a greater percentage of sites with added new equipment in the last 12 months — 29 percent versus 22 percent. Perennial favorites — handheld wand-bay dryers and in-bay credit card acceptance — are again well represented among the purchases. The graphic, below, offers more detail.

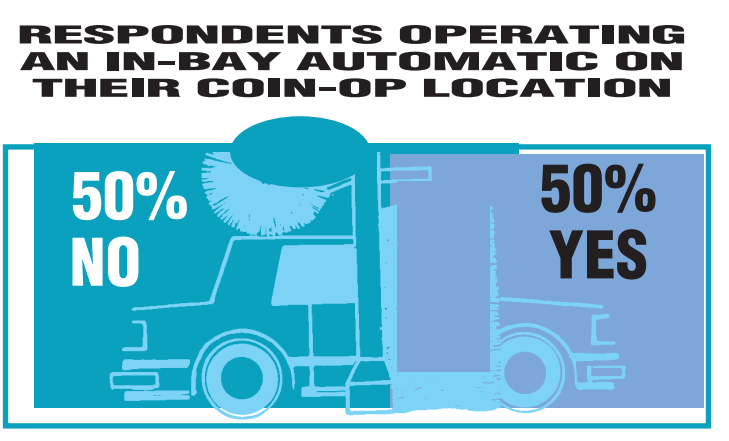
Regarding future equipment purchases, the two groups are more in accord, with 27 percent of each planning on some shopping during the 12 months ahead. Handheld wand-bay dryers again top the shopping list, comprising 24 percent of total planned purchases. Filling the number two position with 11 percent is in-bay credit card acceptance. LED lighting makes its debut on the list with 9 percent.

The Future

Perhaps the most notable aspect of respondents' reported expansion plans relate to the build/buy divide. For the first time since 2006 those planning to build a new facility (5 percent) outnumber those planning to buy an existing car wash (4 percent). Operators of sites with are more than three times as likely to plan expansions as operators of sites without: 7 percent versus 2 percent.







SURVEY

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	16	31	30	23
Mountain	27	29	21	23
Midwest	23	31	25	21
Central	34	29	22	15
South Central	22	30	26	22
Southeast	31	29	19	21
Mid-Atlantic	43	25	13	19
New England	*	*	*	*

*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

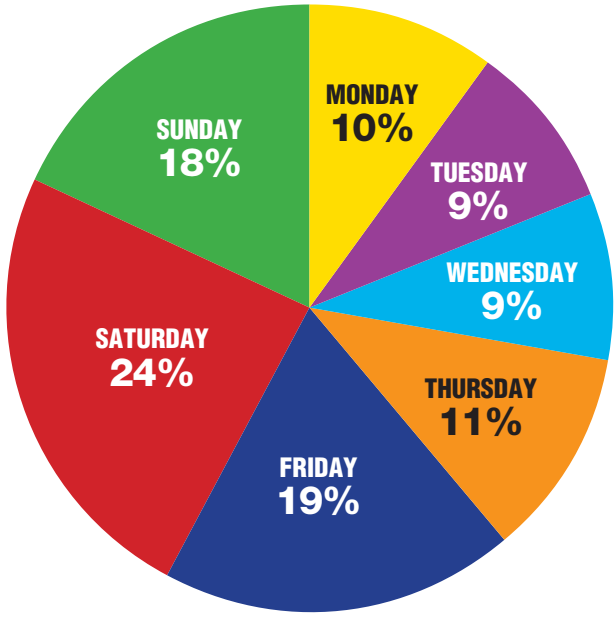
South Central
Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

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

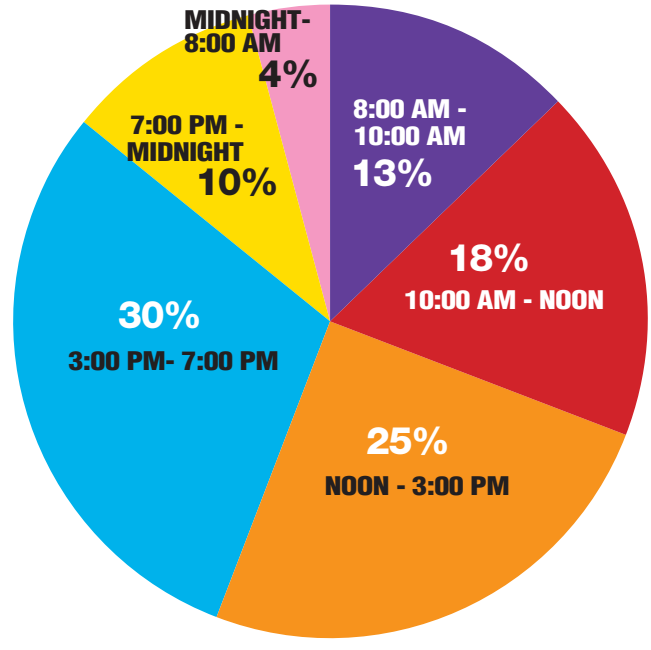
Mid-Atlantic
New Jersey-New York-Pennsylvania

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

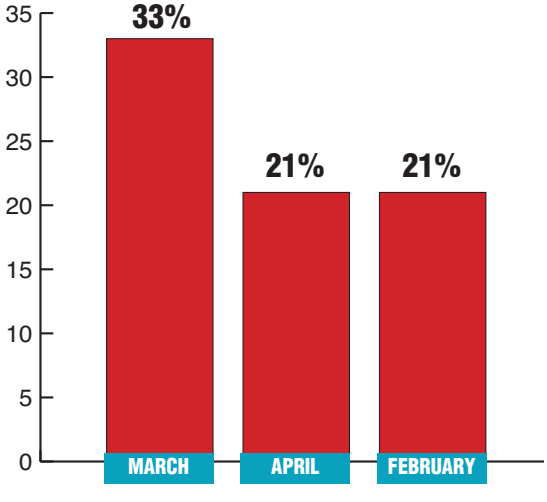
PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



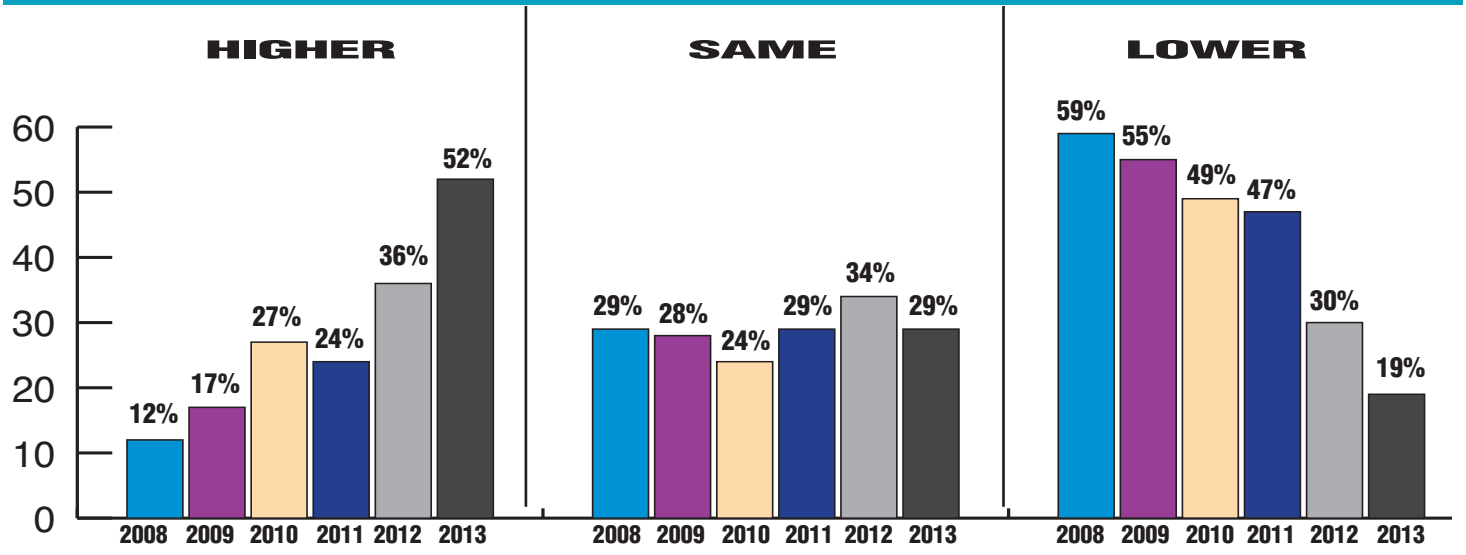
VOTED BEST MONTHS



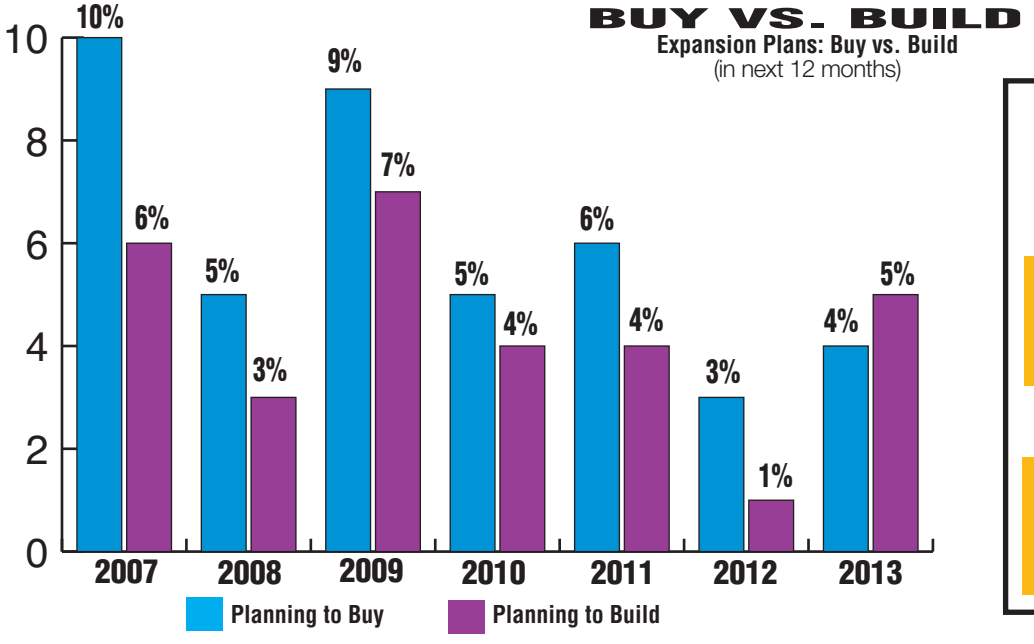
ATTENDANT

	2009	2010	2011	2012	2013
FULL-TIME	16%	14%	20%	13%	15%
PART-TIME	41%	36%	39%	42%	38%
NONE	43%	50%	41%	45%	47%

INCOME (COMPARED TO PREVIOUS YEAR)



EXPANSION PLANS



HOURS OF OPERATION

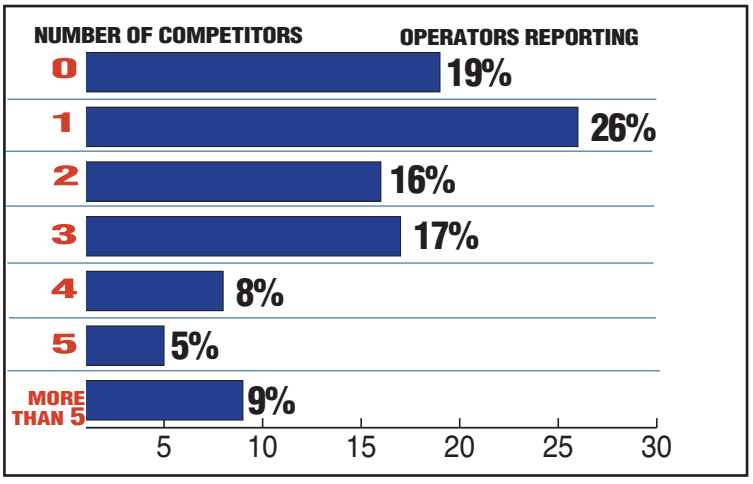
OPEN SUNDAYS

99%

OPEN 24 HOURS

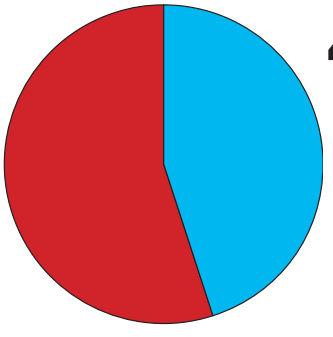
88%

COMPETING SELF-SERVE IN AREA



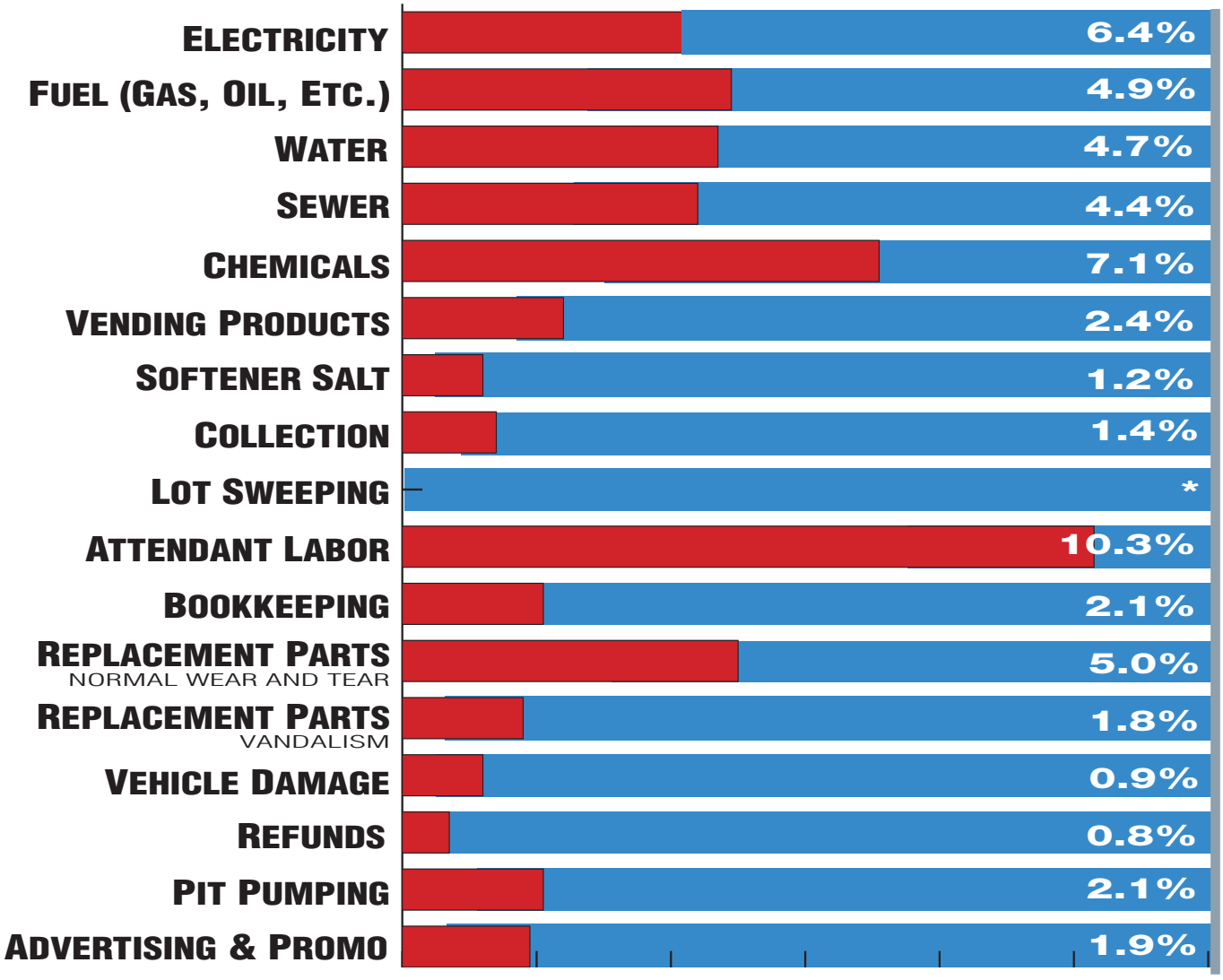
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/ SELF-SERVICE FACILITY

55%
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



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

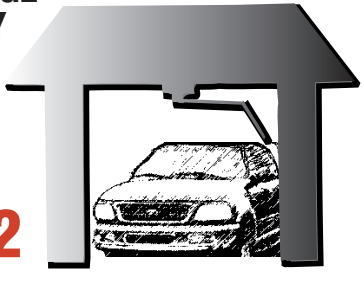
EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



*Too Few Responses

THE AVERAGE MONTHLY GROSS INCOME PER BAY WAS

$1,422



THE AVERAGE MONTHLY GROSS INCOME PER VACUUM WAS

$249

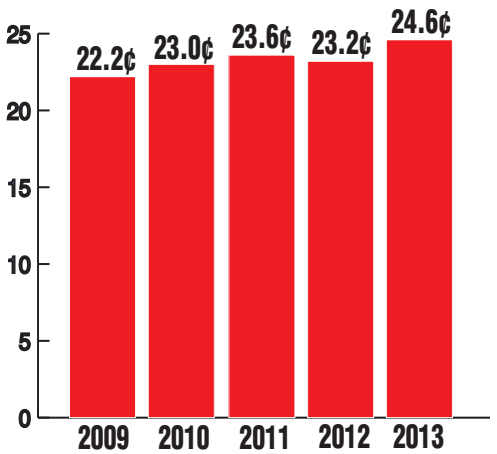
THE AVERAGE MONTHLY GROSS INCOME FOR VENDING WAS

DROP-SHELF: $231

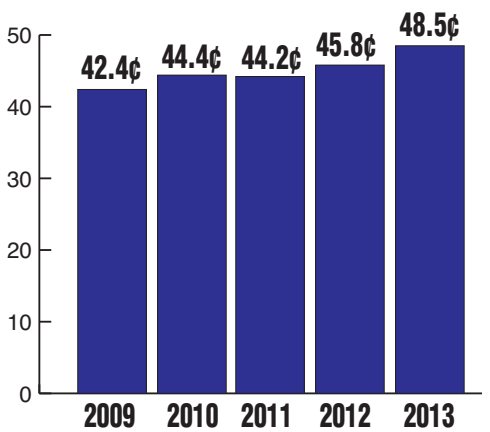
GLASS FRONT: $299

PRICE

VACUUMS
PRICE PER MINUTE



WASH BAYS
PRICE PER MINUTE

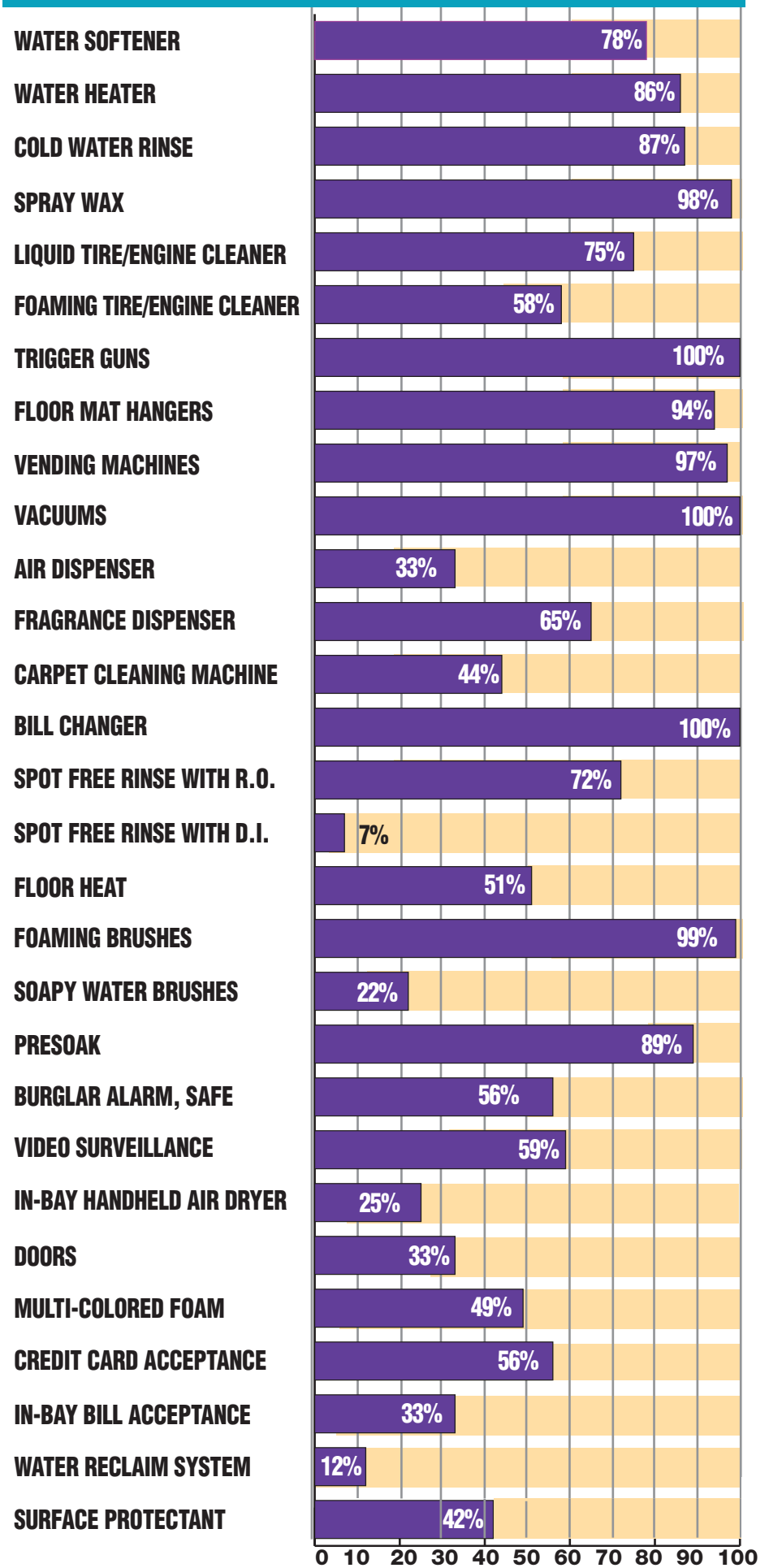


EXPRESS EXTERIOR NEARBY

No 51%
Yes 49%

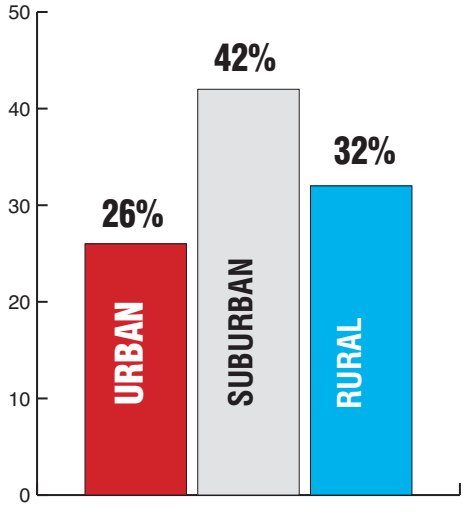
HAS HURT BUSINESS	HAS NOT HURT BUSINESS
44%	56%

CURRENT EQUIPMENT

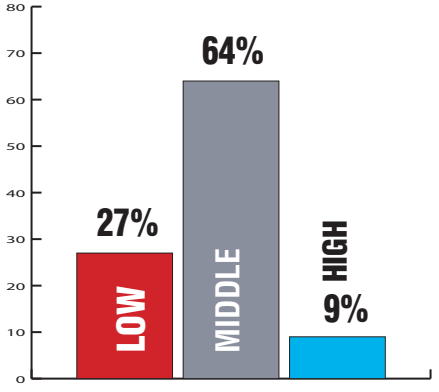


SURVEY

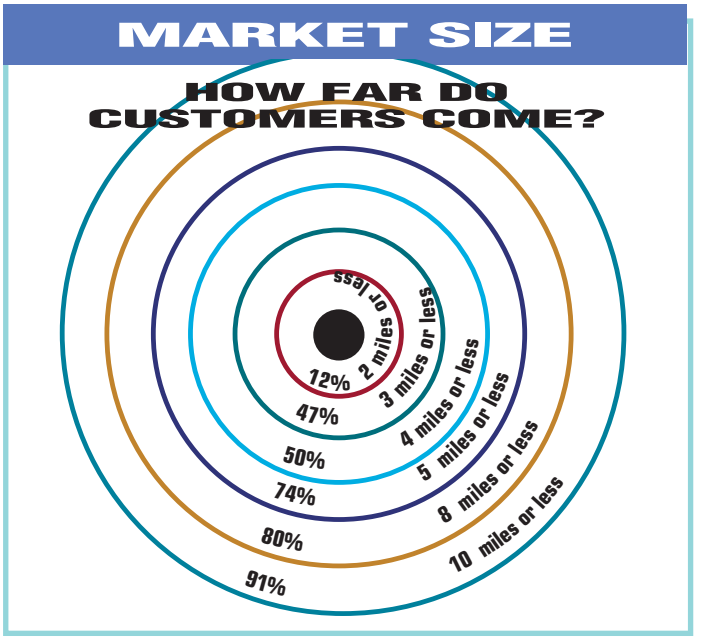
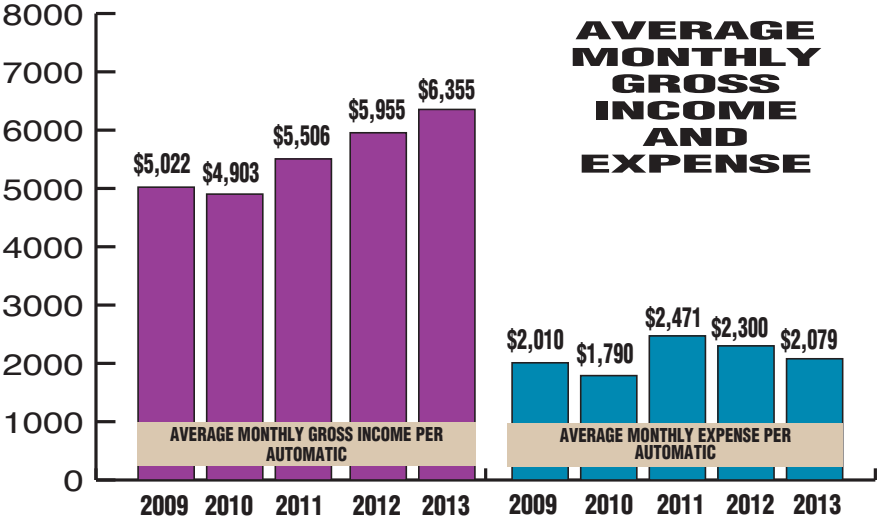
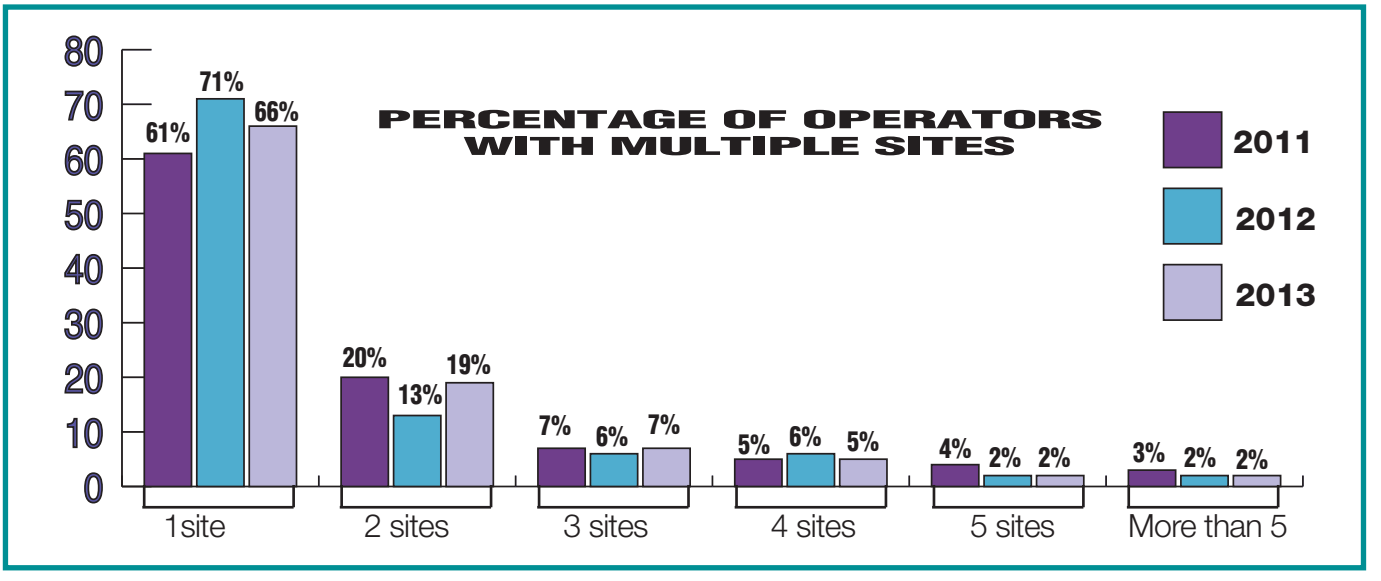
SITE LOCATION



MARKET INCOME LEVEL



MARKET SIZE



AUTOMATICS