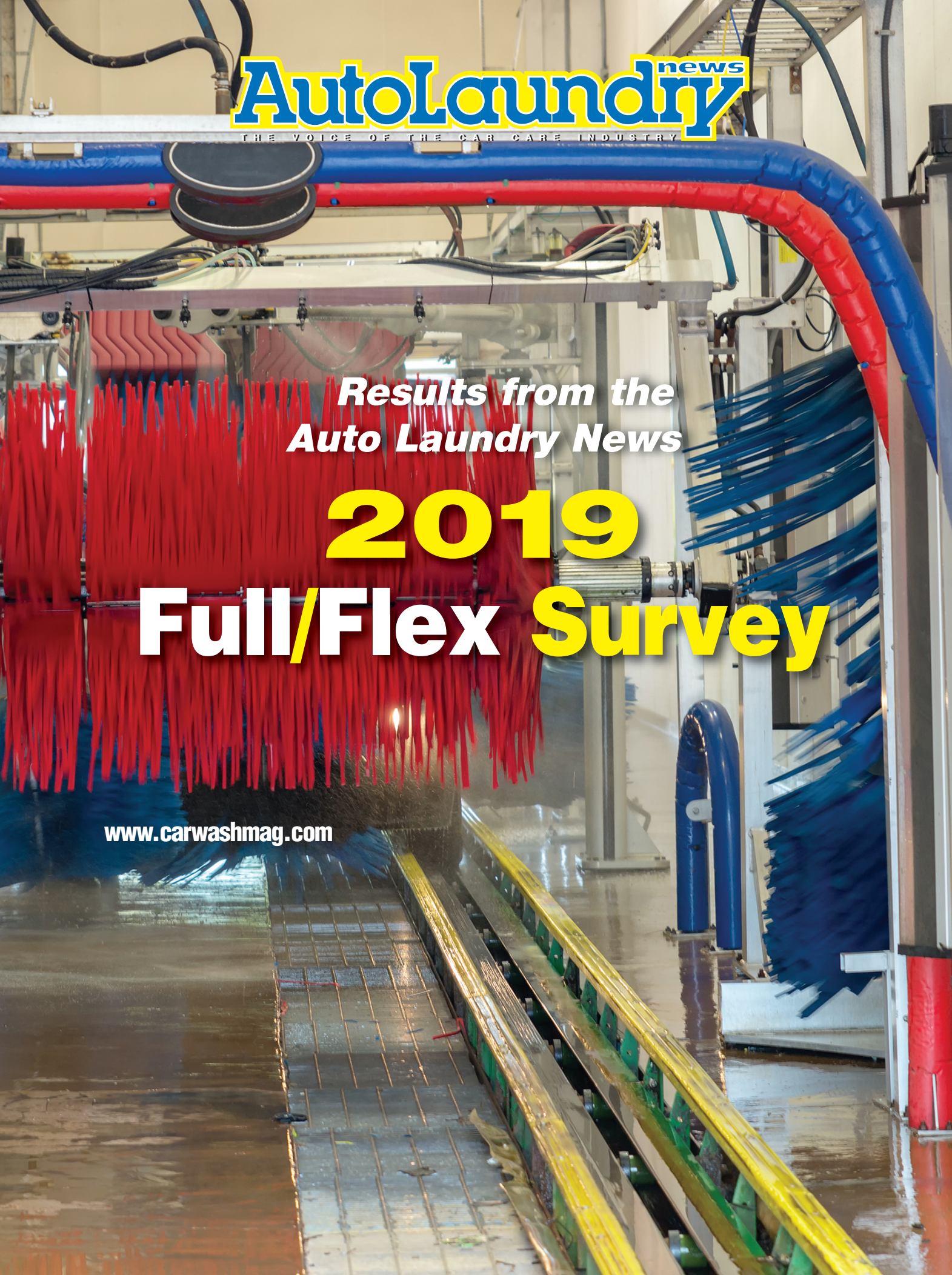
AutoLaundry news
THE VOICE OF THE CAR CARE INDUSTRY



Results from the Auto Laundry News

2019 Full/Flex Survey

www.carwashmag.com

SURVEY

Results From The Auto Laundry News 2019 Full/Flex Survey

The 2019 *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.

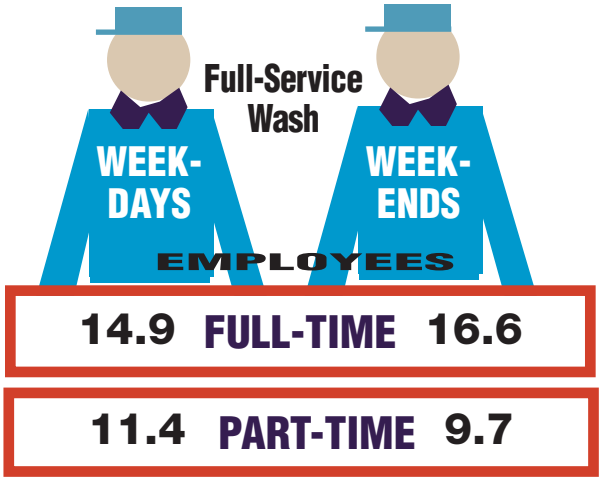
Full-Service vs. Flex-Service Sites

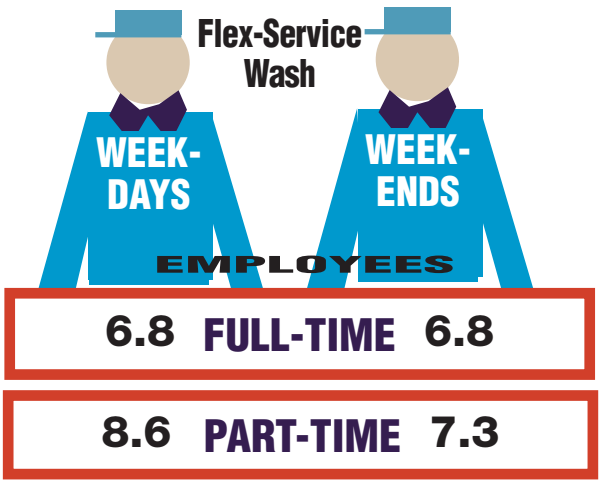
For purposes of comparison, survey responses from full-service sites are on occasion tabulated separately from flex-service responses. Full-service participants make up 82 percent of the total, with flex-service sites accounting for 18 percent. This compares to last year's split of 56/44. Two years ago, flex-serve participants made up 35 percent of the total, 28 percent the year before that. It looked like a trend was emerging; the current results put the kibosh on that notion.

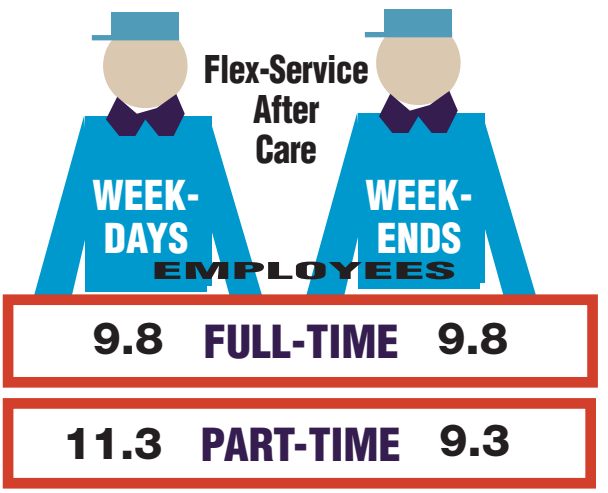
This year, even fewer flex-service sites than in the previous survey claim to operate freestanding after-care centers — 40 percent versus 53 percent. Currently nearly three times as many full-serve participants as last year say they maintain an after-care center on site — 30 percent compared to 11 percent. Fully 80 percent of flex-service respondents vacuum after the wash, only a quarter of which do so at an after-care center. A large majority of full-service participants — 71 percent — continue to employ pre-wash vacuuming.

Revenues

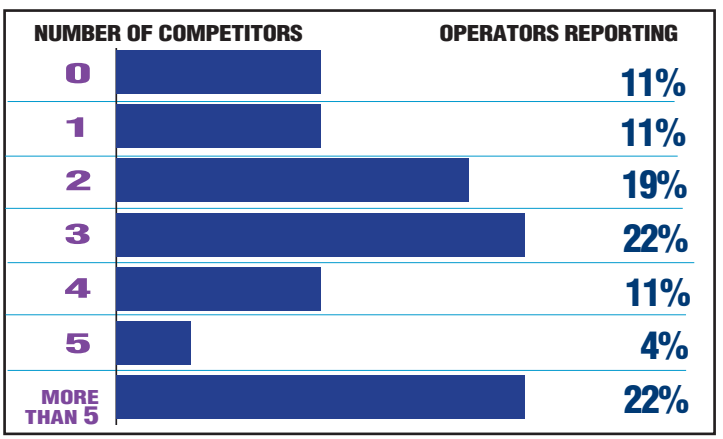
Overall, 29 percent of respondents report increased income compared to the previous year, a remarkable reversal from the 46 percent that did so last year (the graphic on page 47 provides a four-year perspective). This is the lowest number recorded in our surveys of conveyor operations since 2008 when only 21 percent of respondents reported revenue growth. It should be noted, however, that the 2008 survey included exterior operations. Separate surveys of full/flex and exterior washes began in 2014 in which year 67 percent of full/flex sites reported income growth. In the current survey, full-service locations are largely responsible for this year's setback: 26 percent of these respondents report advances while 40 percent of flex-service sites do so. Nearly half (48 percent) of full-service respondents report diminished income. For flex-service sites the percentage is 40.







COMPETING CONVEYOR WASHES IN AREA



PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION

	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	14	11	11	14	18	20	13
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	10	9	11	13	22	25	10
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	9	9	8	16	27	25	7
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	10	12	10	18	28	12
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	15	10	10	17	20	20	8
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	8	10	12	15	28	23	4
Mid-Atlantic New Jersey-New York-Pennsylvania	10	11	9	9	13	33	16
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

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

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	16	29	32	23
Mountain	32	28	20	20
Midwest	33	25	23	20
Central	45	27	12	17
South Central	24	31	26	19
Southeast	25	32	21	22
Mid-Atlantic	42	23	17	19
New England	*	*	*	*

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

OPEN SUNDAY

Full Service	Flex Service
82%	80%

OPEN 24 HOURS

Full Service	Flex Service
0%	0%

	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME
Full Service	33,900	64,600
Flex Service	35,700	62,000

AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

EXTRA SERVICES OFFERED

		Average Price	% Of Operators Offering Services
DETAIL	FULL	$184.00	52%
	FLEX	$185.00	40%
UPHOLSTERY CLEANING	FULL	$72.00	57%
	FLEX	$55.00	40%
QUICK LUBE	FULL	$32.00	13%
	FLEX	$42.00	20%
CARPET SHAMPOO	FULL	$63.00	26%
	FLEX	$50.00	40%
EXTERIOR VINYL PROTECTANT	FULL	$35.00	35%
	FLEX	*	
INTERIOR VINYL PROTECTANT	FULL	$32.00	52%
	FLEX	$15.00	20%
WAX AND HAND BUFF	FULL	$101.00	39%
	FLEX	$82.00	20%
WAX AND MACHINE BUFF	FULL	$122.00	17%
	FLEX	*	0%

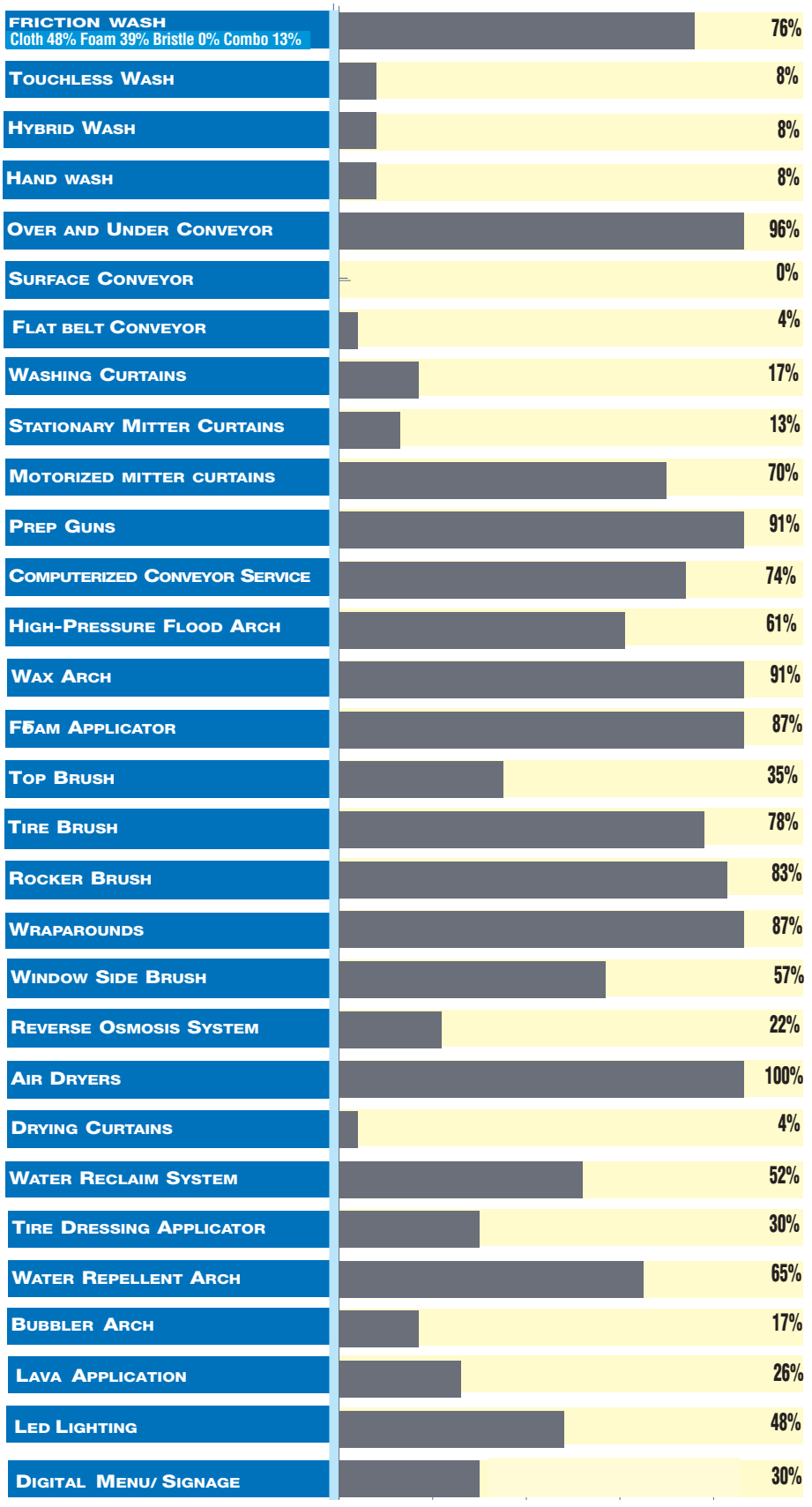
* *Insufficient Responses*

EXTRA ON-LINE SERVICES SOLD

	2015	2016	2017	2018
10% TO 20% OF CARS WASHED	22%	18%	26%	29%
21% TO 30% OF CARS WASHED	28%	11%	15%	13%
31% TO 40% OF CARS WASHED	16%	14%	6%	0%
41% TO 50% OF CARS WASHED	6%	21%	18%	13%
51% TO 60% OF CARS WASHED	19%	7%	9%	4%
OVER 60% OF CARS WASHED	9%	29%	3%	42%

SURVEY

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



OPERATE FREESTANDING AFTER-CARE CENTER

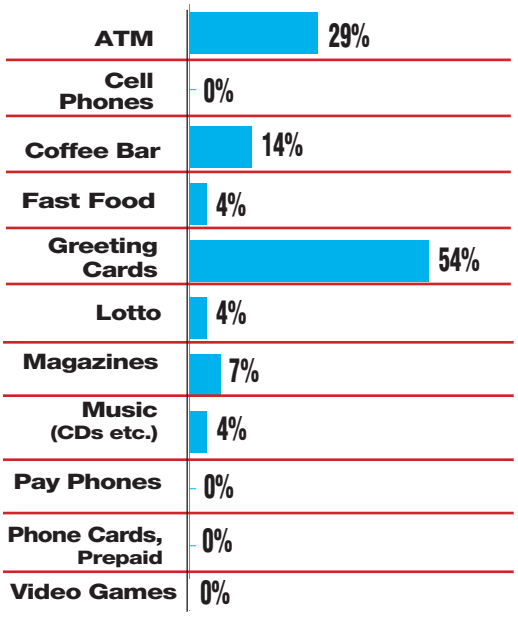
FULL SERVICE	FLEX SERVICE
30%	40%

OPERATE COIN-OP BAYS ON SITE

FULL SERVICE	FLEX SERVICE
22%	0%

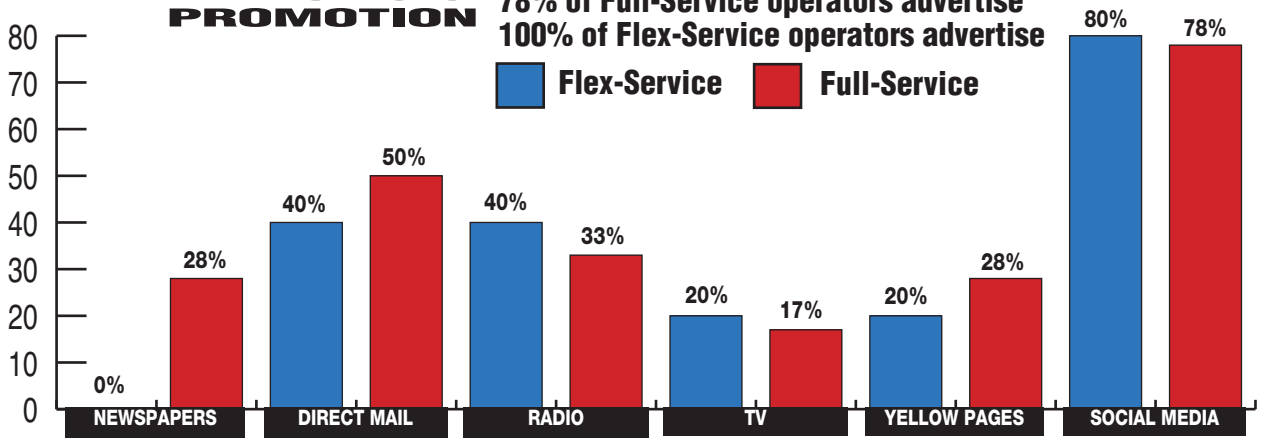
AVERAGE NUMBER OF BAYS	
5.6	N/A

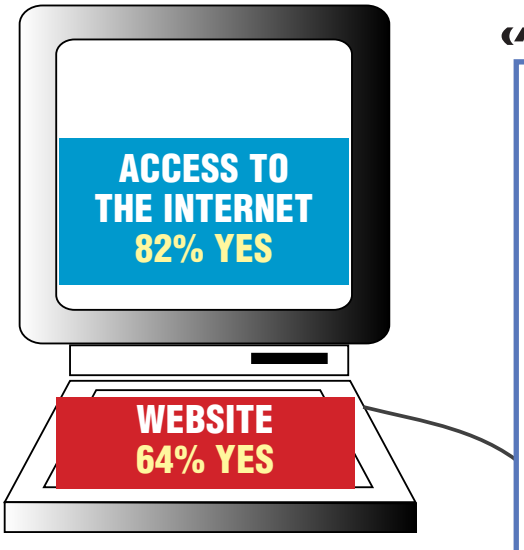
NON-AUTO PROFIT CENTERS ON SITE



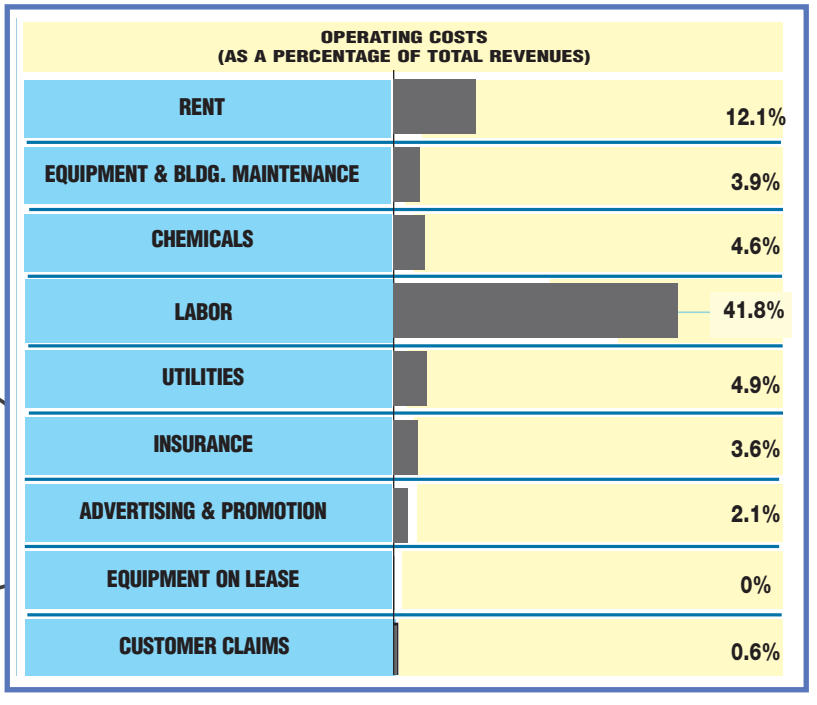
ADVERTISING & PROMOTION

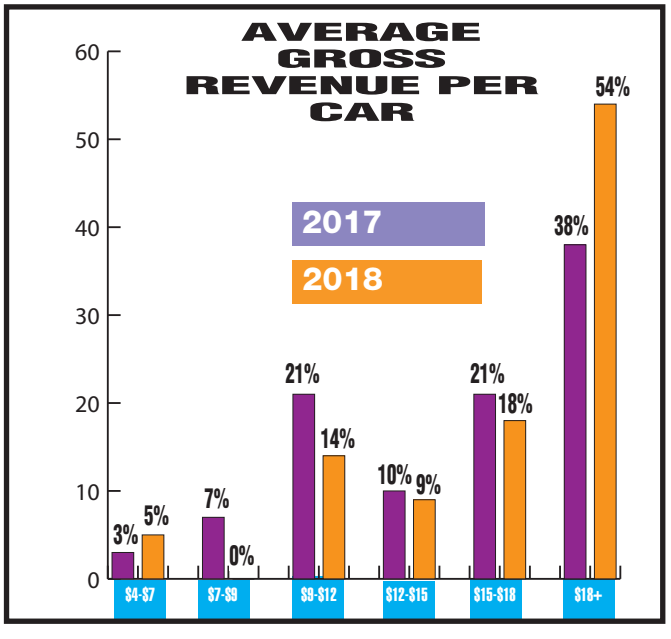
78% of Full-Service operators advertise
100% of Flex-Service operators advertise

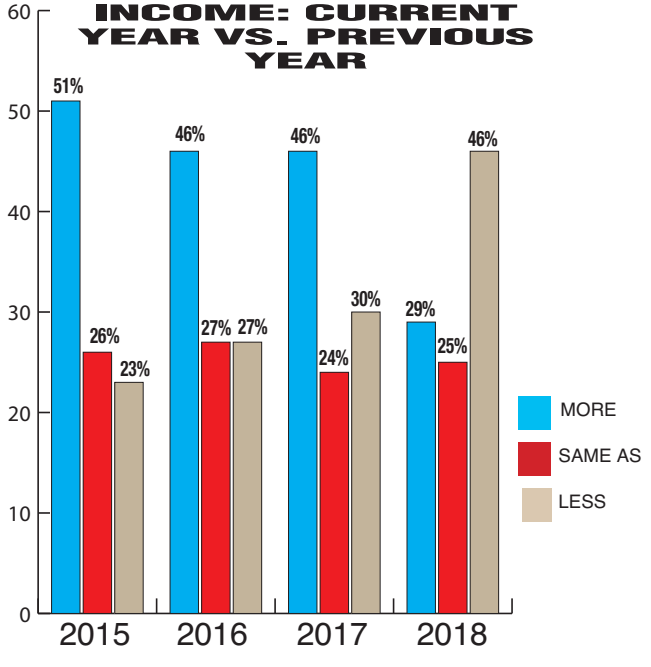




OPERATING COSTS
(AS A PERCENTAGE OF TOTAL REVENUES)

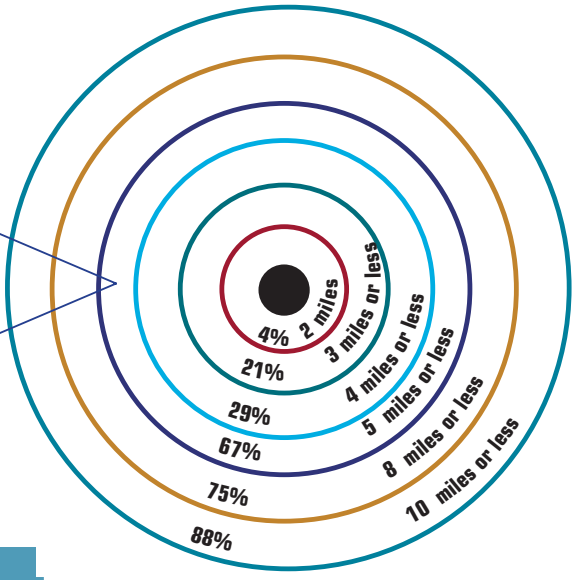




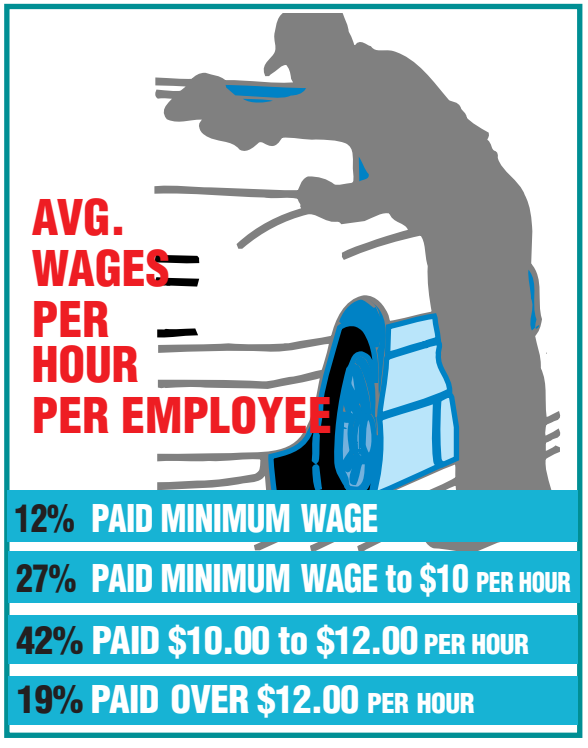


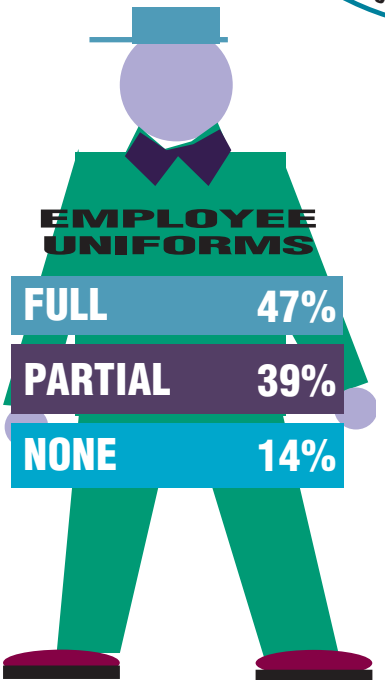
SURVEY

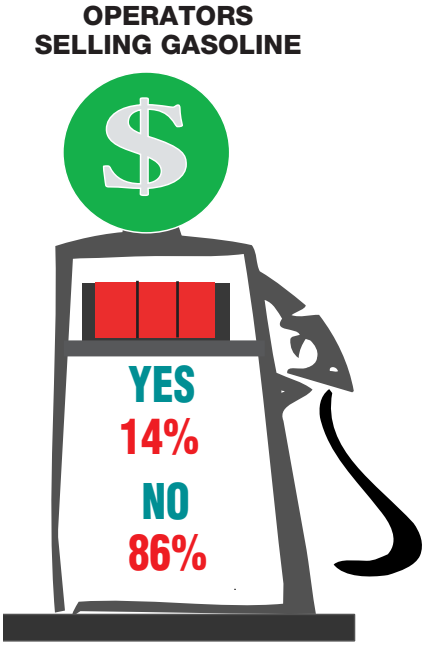
HOW FAR DO CUSTOMERS COME?
(Percent from within 2-mile radius, 3-mile radius, etc.)

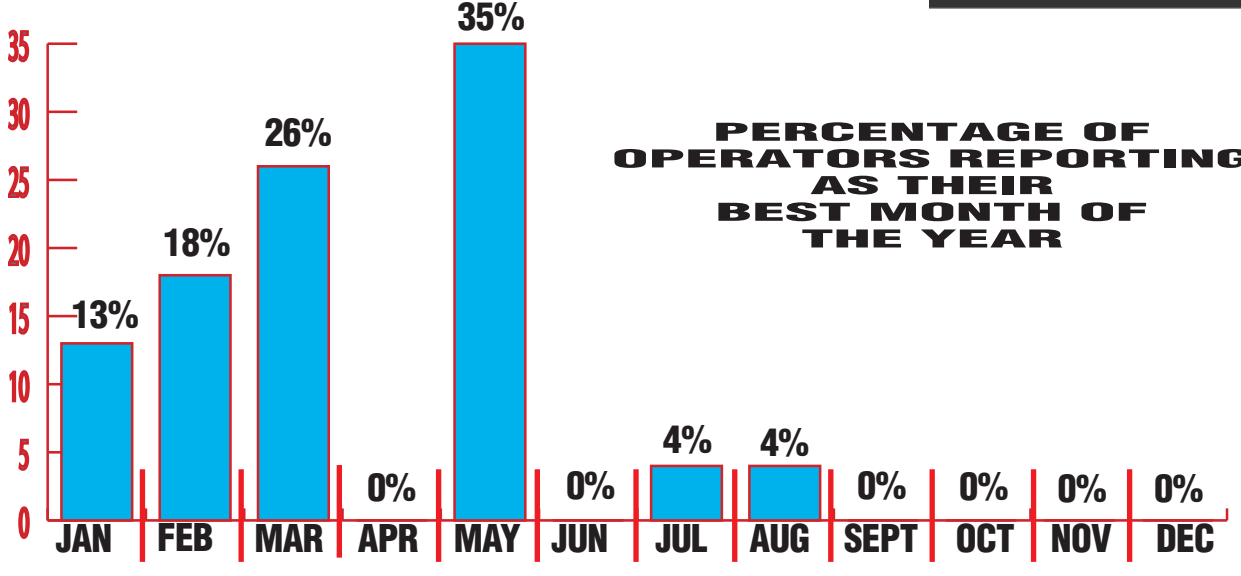


LABOR COSTS









PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR