



*Results from the Auto Laundry News*

# **SELF-SERVICE SURVEY 2013**

# Results From The Auto Laundry News 2013 Self-Service Survey

**T**he 2013 *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 48 percent of the total response.

### Revenues

In this year's survey, 36 percent of participants, overall, report increased income compared to the previous year. In the last survey, only 24 percent were able to report such progress. More significantly, for the first time since 2001, this group represents the largest proportion of survey respondents. The smallest group — 30 percent of the total — is made up of those who report declining revenues. This last occurred also in the 2001 survey. Moreover, the 30 percent who are experiencing reversals compare well with the 47 percent who fell into this category last year.


Sites with continue to outperform sites without: 39 percent of the former (30 percent last year) report higher revenues, while 34 percent (17 percent last year) of sites without do so. Sites with report \$1,532 monthly income (\$1,338 last year) per wand wash bay compared to \$1,209 for sites without (\$1,059 last year). Sites with generate average revenue of \$263 per vacuum, while site without manage \$160.

### Equipment

Overall, 48 percent of self-service washes have in-bay automatics (IBAs) on site, 2 percent have full-service, 4 percent have flex-serve, and 6 percent have express-exterior washes.

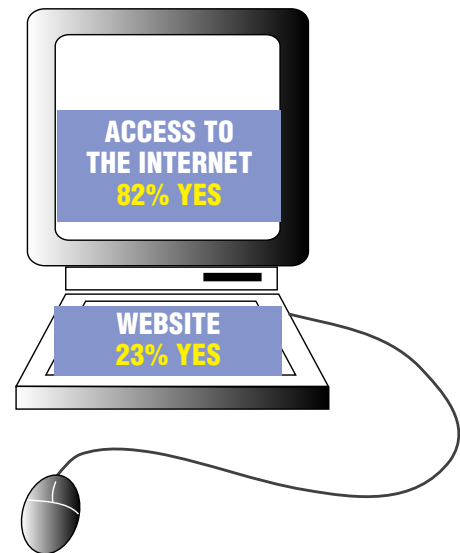
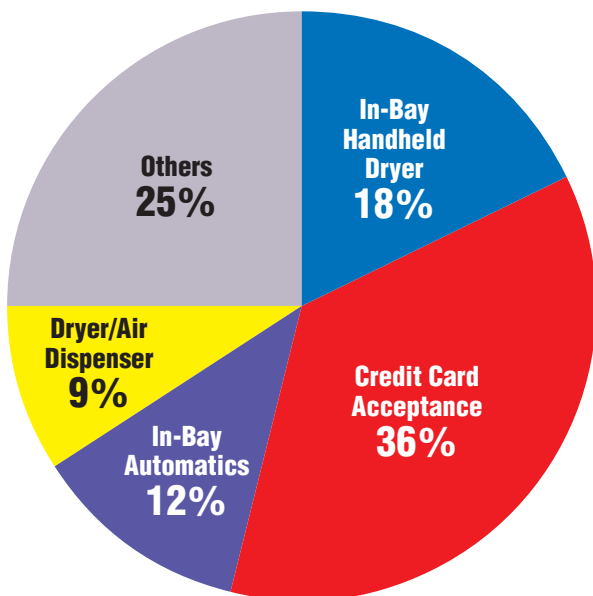
Sites with were more than twice as likely as sites without to have added new equipment in the last 12 months — 30 percent compared to 14 percent. In the 12 months ahead, however, there is greater parity between the two groups: 29 percent of sites with plan equipment purchases in the coming year, while 24 percent of sites without do. Handheld wand-bay dryers again top the shopping list, comprising 24 percent of total planned purchases. At 12 percent, IBAs are a distant number two. Vacuums fill the third slot with 7 percent.

### The Future

Considering the progress reported by survey participants, there is surprisingly little enthusiasm for future expansion. Only 1 percent of respondents (4 percent last year) are looking to build new facilities, all of which are planned wand-bay/express-exterior combinations. Three percent are planning to buy an existing self-service wash with either an IBA or express-exterior component. 

## NEW EQUIPMENT

22% of operators added equipment in the past 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	23	26	32	19
Mountain	27	29	23	21
Midwest	29	29	21	21
Central	29	32	20	19
South Central	27	26	22	25
Southeast	26	28	21	25
Mid-Atlantic	41	27	15	17
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

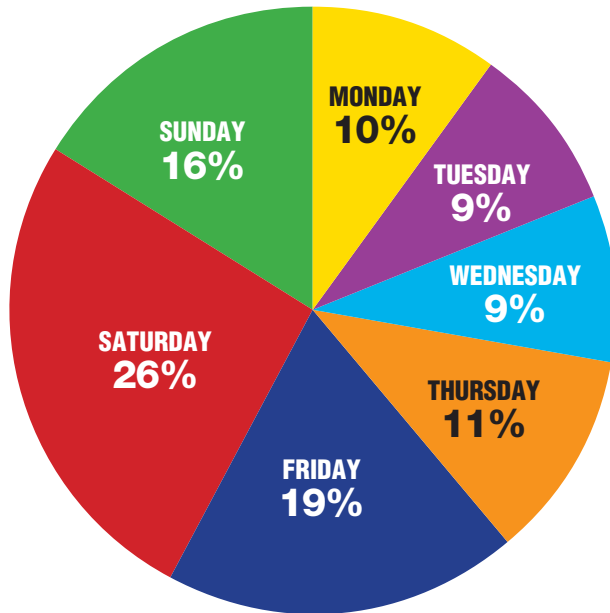
#### Mid-Atlantic

New Jersey-New York-Pennsylvania

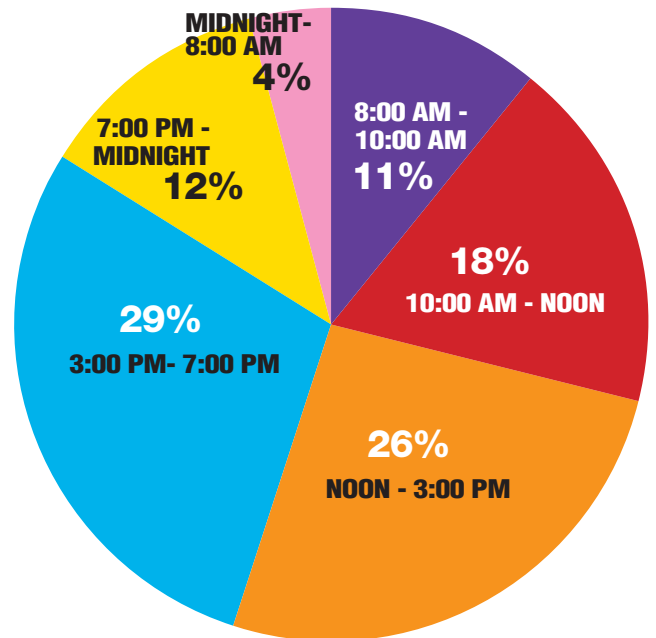
#### New England

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

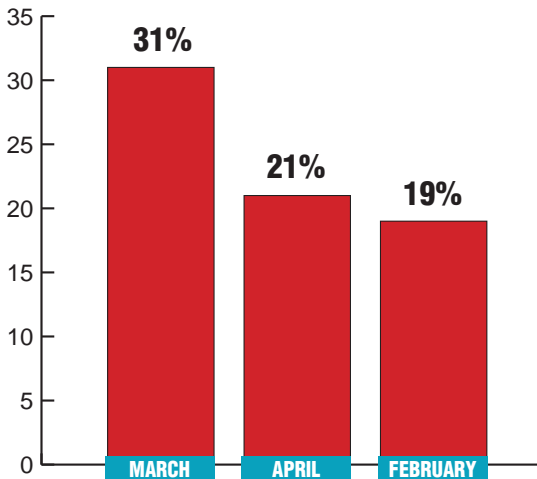
### PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



### PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



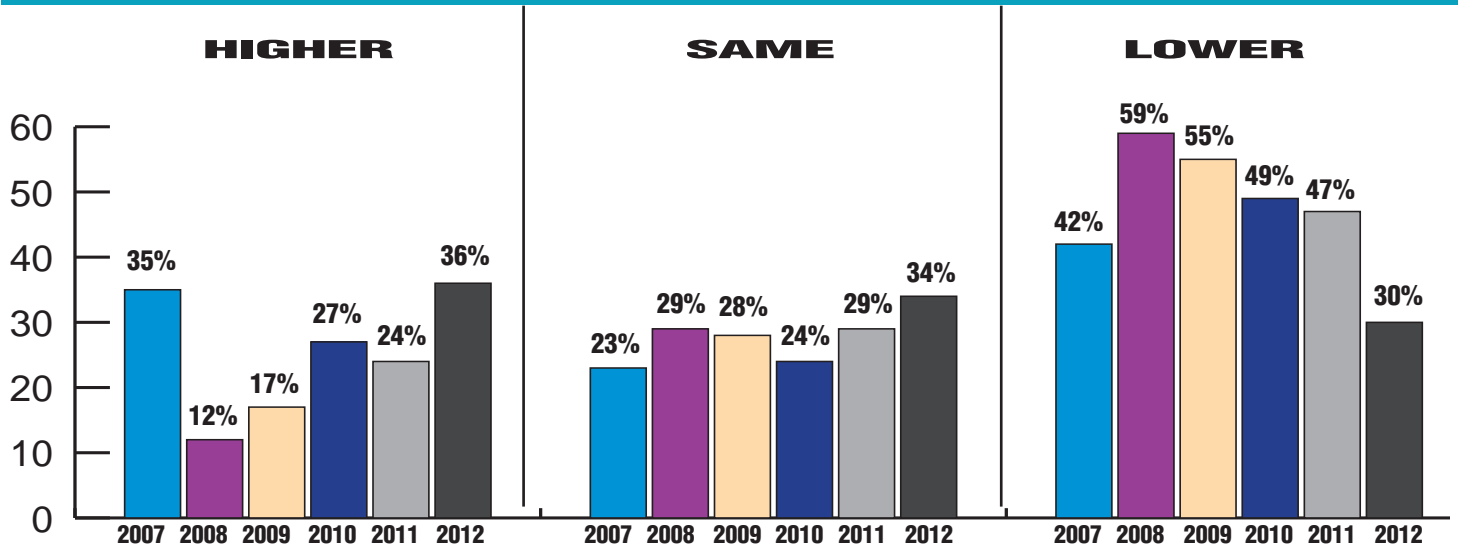
### VOTED BEST MONTHS



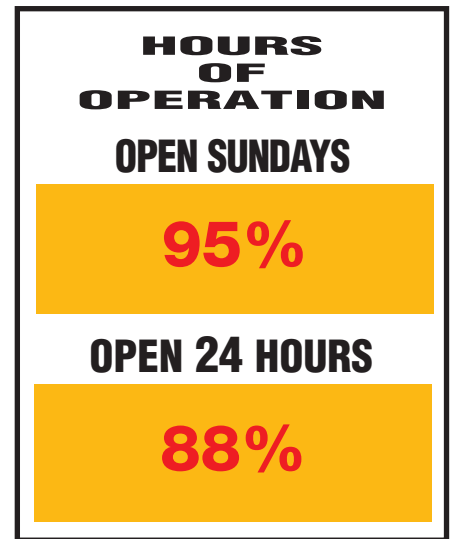
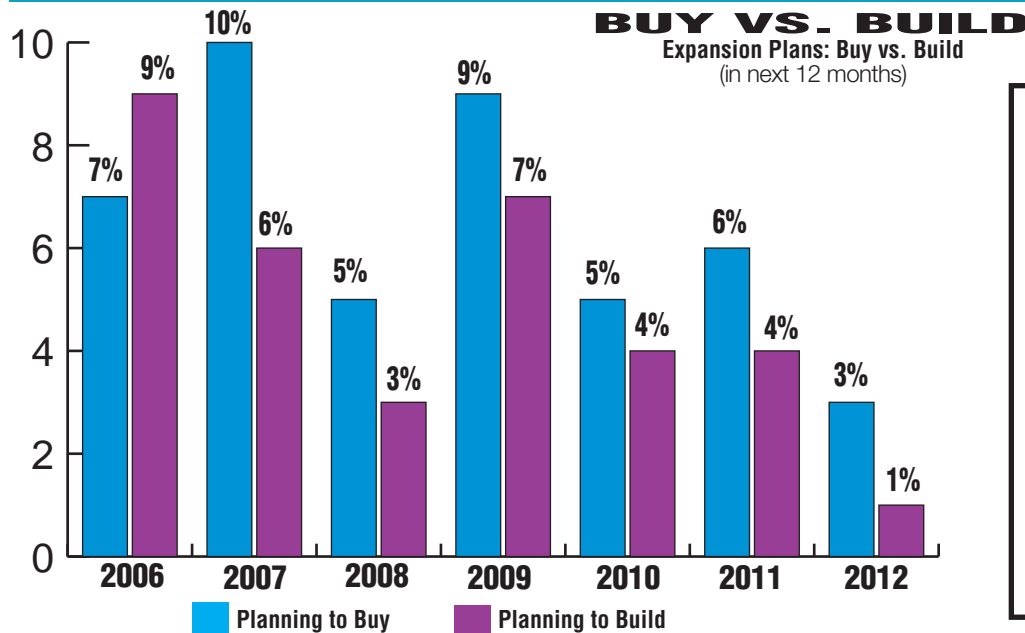
### ATTENDANT

	2008	2009	2010	2011	2012
FULL-TIME	7%	16%	14%	20%	13%
PART-TIME	42%	41%	36%	39%	42%
NONE	51%	43%	50%	41%	45%

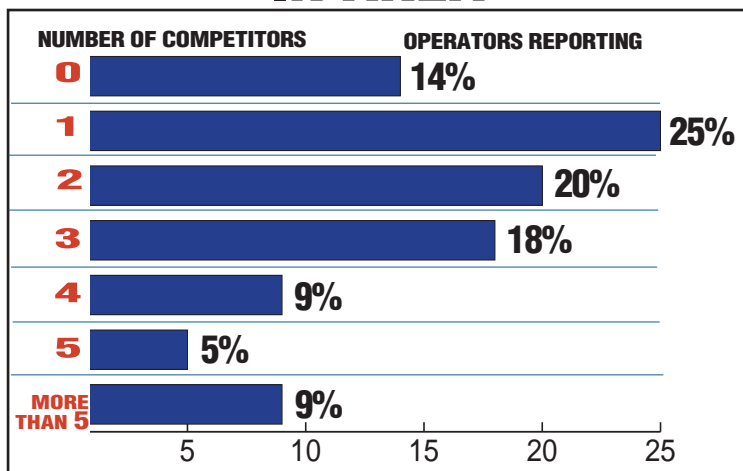
# INCOME (COMPARED TO PREVIOUS YEAR)



# EXPANSION PLANS

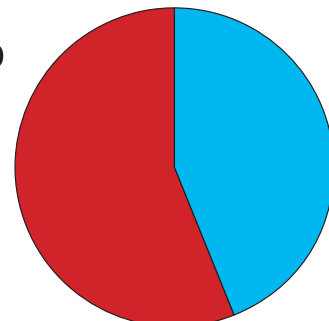


# COMPETING SELF-SERVE IN AREA



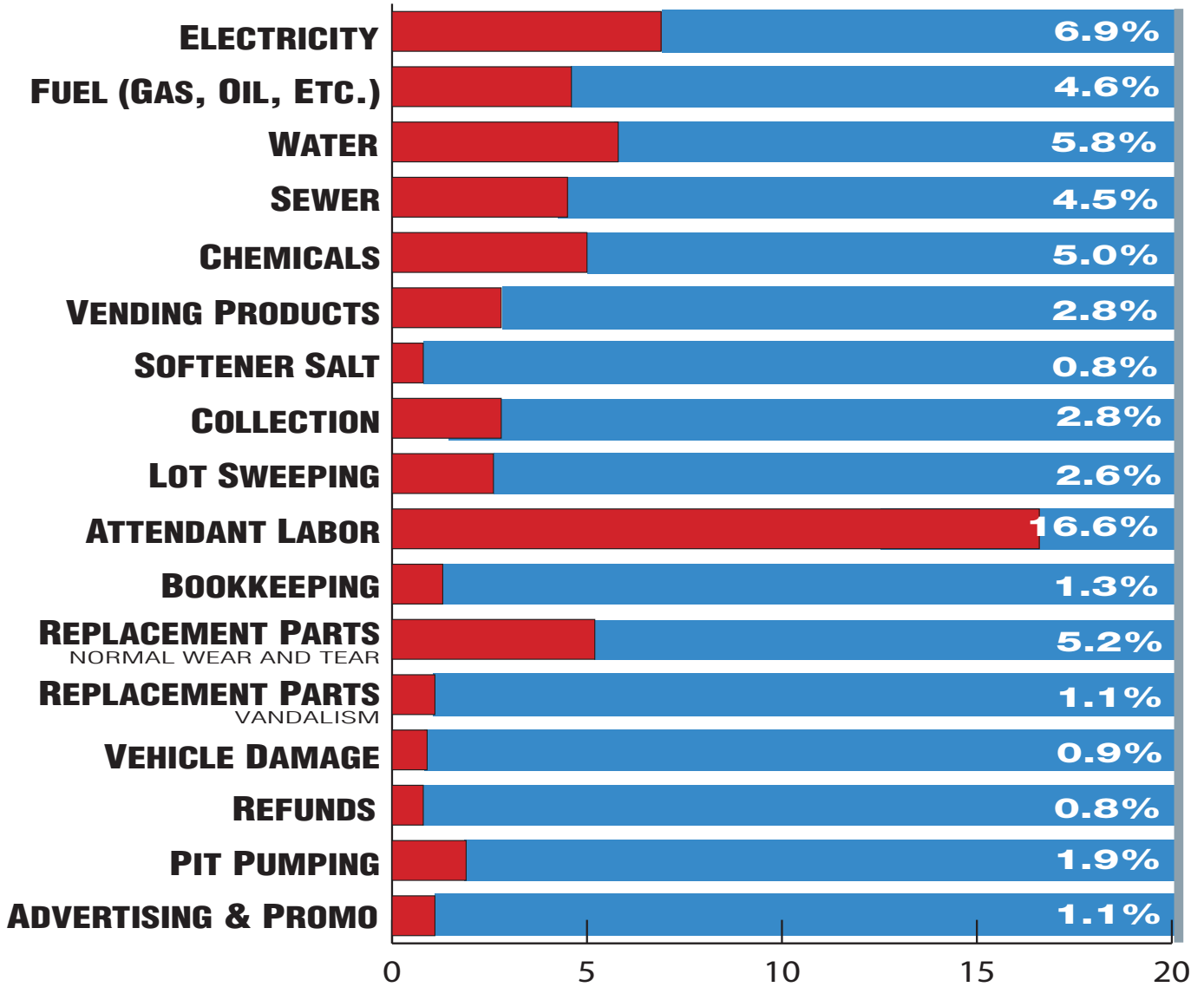
# RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/Self-SERVICE FACILITY

**56%**  
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



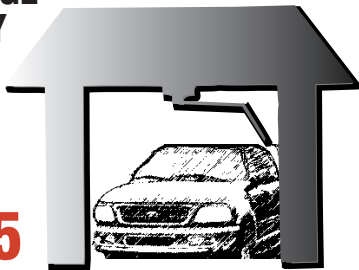
**44%**  
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

# EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



THE AVERAGE MONTHLY GROSS INCOME PER BAY WAS

**\$1,375**



THE AVERAGE MONTHLY GROSS INCOME PER VACUUM WAS

**\$219**

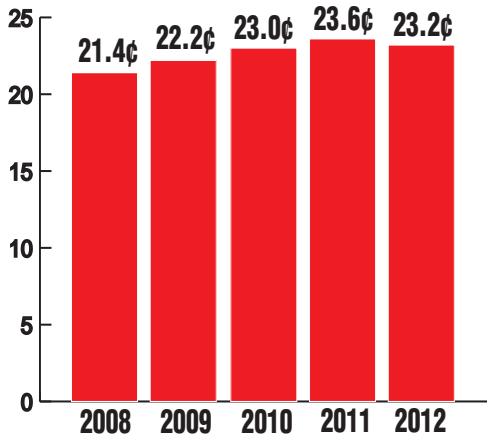


THE AVERAGE MONTHLY GROSS INCOME FOR VENDING WAS

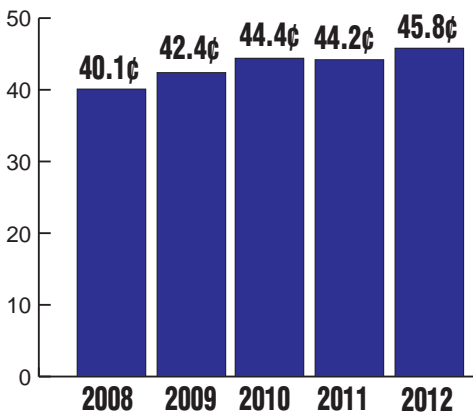
**DROP-SHELF: \$202**  
**GLASS FRONT: \$321**

## PRICE

### VACUUMS PRICE PER MINUTE



### WASH BAYS PRICE PER MINUTE

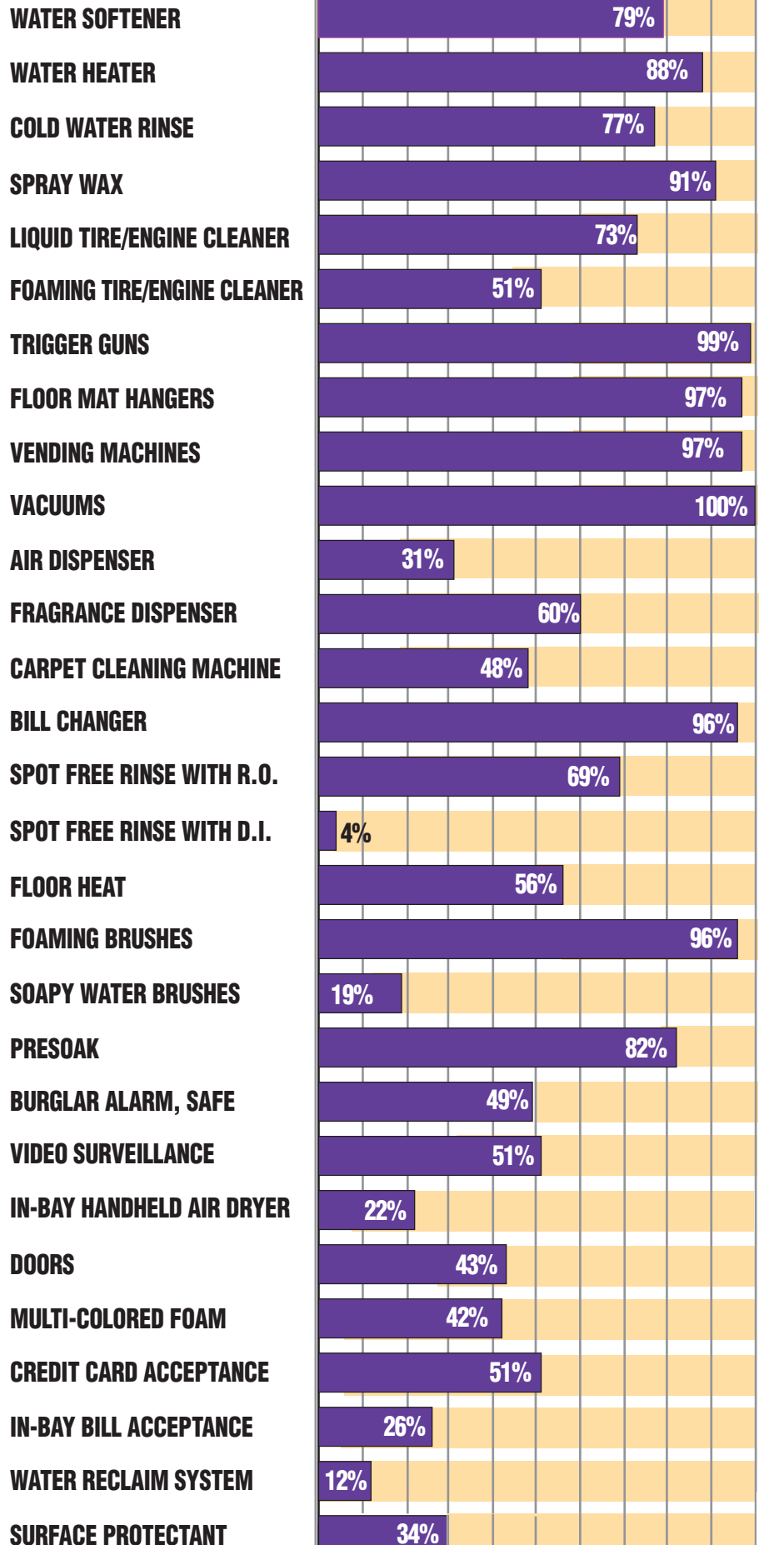


## EXPRESS EXTERIOR NEARBY

No 57%  
Yes 43%

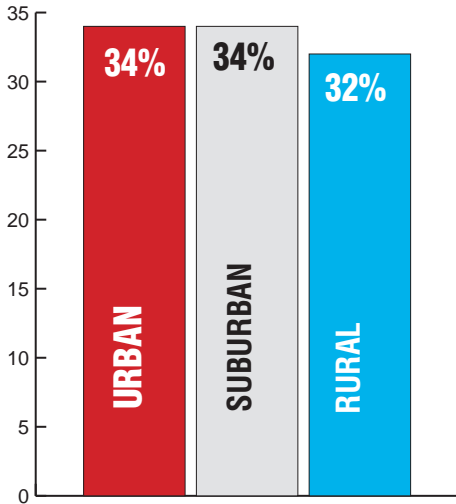
HAS HURT BUSINESS	HAS NOT HURT BUSINESS
45%	55%

## CURRENT EQUIPMENT

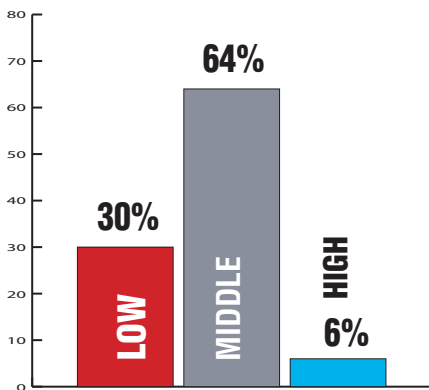


## SURVEY

### SITE LOCATION

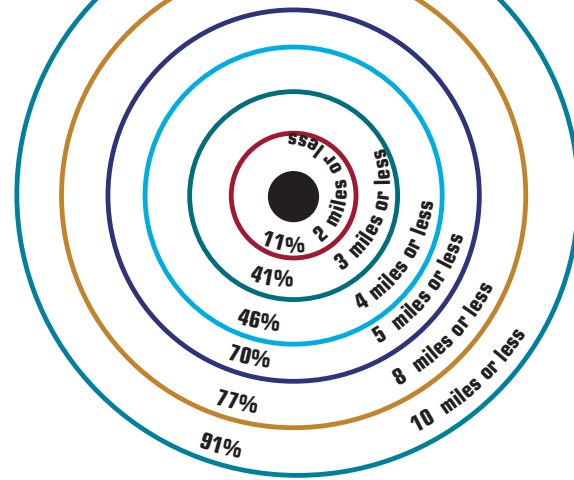


### MARKET INCOME LEVEL



## MARKET SIZE

### HOW FAR DO CUSTOMERS COME?



## AUTOMATICS

