Results from the Auto Laundry News

2022 Self-Service Survey

www.carwashmag.com
The 2022 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 respondents throughout the United States.

For purposes of comparison, survey responses from sites with in-bay automatics (sites with) and sites without this type of equipment (sites without) are on occasion tabulated separately. In the current survey, participating locations with in-bay automatics make up 56 percent of the total response; those without account for 44 percent. This is again a near reversal of the previous year’s response composition: 42 percent with, 58 percent without, which, in turn, was a switch from the split the year before that: 54/46.

Revenues
After reporting for four consecutive years that fewer participants than in the previous survey experienced an increase in income compared to the year before, we finally have a break in that trend. In the current survey, 46 percent of respondents, overall, report improved income over last year when only 23 percent experienced such progress. While this is a noteworthy step forward, it is also the fourth year in a row that a minority of survey respondents, overall, report income growth compared to the previous year. The percentage of respondents who report a year-over-year decrease in income has declined for a second year going from 31 percent two years ago to 21 percent last year to 13 percent in the current survey. The graphic on page 55 provides a six-year perspective.

Sites with outperformed sites without: 52 percent of the former notes increased income over the previous year, the exact percentage as two years ago; only 37 percent of sites without managed to up their income. Ten percent of sites with report declining income (26 percent last year) while 19 percent of sites without do so (16 percent last year).

Equipment
Overall, 33 percent of respondents are planning to purchase new equipment during the 12 months ahead. This compares to 36 percent who had such plans last year. While last year sites with and sites without were likely to make purchases at roughly the same clip — 37 percent and 35 percent respectively — in the current survey, sites with are far more likely to shop than their counterparts without in-bay automatics: 41 percent versus 24 percent. New in-bay automatics and in-bay handheld dryers remain favorites on the shopping list. The graphic below shows more detail.

Sites with and sites without report adding new equipment during the previous 12 months in near equal numbers in the current survey — 32 percent (21 percent last year) compared to 29 percent (31 percent last year). In a repeat of last year’s results, in-bay automatics were the most popular purchase at sites with while sites without favored credit card acceptance.
PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>Winter</th>
<th>Spring</th>
<th>Summer</th>
<th>Fall</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific</td>
<td>*</td>
<td>*</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Mountain</td>
<td>20</td>
<td>29</td>
<td>30</td>
<td>21</td>
</tr>
<tr>
<td>Midwest</td>
<td>21</td>
<td>33</td>
<td>24</td>
<td>22</td>
</tr>
<tr>
<td>Central</td>
<td>39</td>
<td>17</td>
<td>21</td>
<td>23</td>
</tr>
<tr>
<td>South Central</td>
<td>21</td>
<td>31</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>Southeast</td>
<td>29</td>
<td>30</td>
<td>18</td>
<td>23</td>
</tr>
<tr>
<td>Mid-Atlantic</td>
<td>34</td>
<td>28</td>
<td>22</td>
<td>16</td>
</tr>
<tr>
<td>New England</td>
<td>30</td>
<td>33</td>
<td>23</td>
<td>15</td>
</tr>
</tbody>
</table>

NOTE: Some results do not total 100 due to rounding

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK

- Sunday: 17%
- Monday: 12%
- Tuesday: 10%
- Wednesday: 10%
- Thursday: 11%
- Friday: 18%
- Saturday: 22%

PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY

- Midnight - 8:00 AM: 5%
- 8:00 AM - 10:00 AM: 12%
- 10:00 AM - Noon: 16%
- Noon - 3:00 PM: 21%
- 3:00 PM - 7:00 PM: 33%
- 7:00 PM - Midnight: 13%

ATTENDANT

<table>
<thead>
<tr>
<th>Year</th>
<th>Full-Time</th>
<th>Part-Time</th>
<th>None</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>16%</td>
<td>32%</td>
<td>52%</td>
</tr>
<tr>
<td>2018</td>
<td>19%</td>
<td>31%</td>
<td>50%</td>
</tr>
<tr>
<td>2019</td>
<td>15%</td>
<td>50%</td>
<td>35%</td>
</tr>
<tr>
<td>2020</td>
<td>13%</td>
<td>42%</td>
<td>45%</td>
</tr>
<tr>
<td>2021</td>
<td>19%</td>
<td>42%</td>
<td>39%</td>
</tr>
</tbody>
</table>
**INCOME** (Compared to Previous Year)

**HIGHER**  
- 2016: 52%  
- 2017: 50%  
- 2018: 43%  
- 2019: 40%  
- 2020: 23%  
- 2021: 46%

**SAME**  
- 2016: 29%  
- 2017: 33%  
- 2018: 29%  
- 2019: 29%  
- 2020: 56%  
- 2021: 41%

**LOWER**  
- 2016: 19%  
- 2017: 17%  
- 2018: 29%  
- 2019: 31%  
- 2020: 21%  
- 2021: 13%

---

**Expansion Plans**

**Buy vs. Build** (in next 12 months)

- **Planning to Buy**
  - 2015: 9%  
  - 2016: 6%  
  - 2017: 6%  
  - 2018: 4%  
  - 2019: 5%  
  - 2020: 4%  
  - 2021: 2%

- **Planning to Build**
  - 2015: 10%  
  - 2016: 8%  
  - 2017: 4%  
  - 2018: 4%  
  - 2019: 7%  
  - 2020: 4%  
  - 2021: 5%

---

**Hours of Operation**

- **Open Sundays**: 100%
- **Open 24 Hours**: 87%

---

**Competing Self-Serve in Area**

<table>
<thead>
<tr>
<th>Number of Competitors</th>
<th>Operators Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>16%</td>
</tr>
<tr>
<td>1</td>
<td>24%</td>
</tr>
<tr>
<td>2</td>
<td>22%</td>
</tr>
<tr>
<td>3</td>
<td>14%</td>
</tr>
<tr>
<td>4</td>
<td>14%</td>
</tr>
<tr>
<td>5</td>
<td>5%</td>
</tr>
<tr>
<td>More Than 5</td>
<td>5%</td>
</tr>
</tbody>
</table>

---

**Respondents Who Operate a Combined Automatic/ Self-Service Facility**

- **68%**: Automatic Wash Revenues as Percentage of Total Income
- **32%**: Self-Serve Wash Revenues as Percentage of Total Income

---

*Auto Laundry News May 2022*
## EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electricity</td>
<td>6.6%</td>
</tr>
<tr>
<td>Fuel (Gas, Oil, Etc.)</td>
<td>3.9%</td>
</tr>
<tr>
<td>Water</td>
<td>6.2%</td>
</tr>
<tr>
<td>Sewer</td>
<td>4.4%</td>
</tr>
<tr>
<td>Chemicals</td>
<td>5.4%</td>
</tr>
<tr>
<td>Vending Products</td>
<td>1.2%</td>
</tr>
<tr>
<td>Softener Salt</td>
<td>1.0%</td>
</tr>
<tr>
<td>Collection</td>
<td>1.8%</td>
</tr>
<tr>
<td>Lot Sweeping</td>
<td>5.0%</td>
</tr>
<tr>
<td>Attendant Labor</td>
<td>17.0%</td>
</tr>
<tr>
<td>Bookkeeping</td>
<td>1.7%</td>
</tr>
<tr>
<td>Replacement Parts Normal Wear and Tear</td>
<td>3.4%</td>
</tr>
<tr>
<td>Replacement Parts Vandalism</td>
<td>1.8%</td>
</tr>
<tr>
<td>Vehicle Damage</td>
<td>0%</td>
</tr>
<tr>
<td>Refunds</td>
<td>0.5%</td>
</tr>
<tr>
<td>Pit Pumping</td>
<td>2.0%</td>
</tr>
<tr>
<td>Advertising &amp; Promo</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

The average monthly gross income per bay was $1,975

The average monthly gross income per vacuum was $433

The average monthly gross income for vending was $354
### PRICE

**Vacuums (Price per Minute)**

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price per Minute</td>
<td>27.5¢</td>
<td>27.9¢</td>
<td>28.4¢</td>
<td>31.8¢</td>
<td>27.3¢</td>
</tr>
</tbody>
</table>

### Wash Bays (Price per Minute)

<table>
<thead>
<tr>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price per Minute</td>
<td>54.9¢</td>
<td>53.4¢</td>
<td>59.7¢</td>
<td>56.3¢</td>
<td>56.7¢</td>
</tr>
</tbody>
</table>

### Current Equipment

- **Water Softener**: 77%
- **Water Heater**: 74%
- **Cold Water Rinse**: 92%
- **Spray Wax**: 100%
- **Liquid Tire/Engine Cleaner**: 69%
- **Foaming Tire/Engine Cleaner**: 46%
- **Trigger Guns**: 100%
- **Floor Mat Hangers**: 95%
- **Vending Machines**: 85%
- **Vacuums**: 95%
- **Air Dispenser**: 44%
- **Fragrance Dispenser**: 54%
- **Carpet Cleaning Machine**: 31%
- **Bill Changer**: 95%
- **Spot Free Rinse with R.O.**: 79%
- **Spot Free Rinse with D.I.**: 8%
- **Floor Heat**: 97%
- **Foaming Brushes**: 44%
- **Soapy Water Brushes**: 21%
- **Presoak**: 51%
- **Burglar Alarm, Safe**: 82%
- **Video Surveillance**: 85%
- **In-Bay Handheld Air Dryer**: 46%
- **Doors**: 41%
- **Multi-Colored Foam**: 54%
- **Credit Card Acceptance**: 85%
- **In-Bay Bill Acceptance**: 41%
- **Water Reclaim System**: 13%
- **Surface Protectant**: 46%
- **Token Acceptance**: 41%
- **LED Lighting**: 79%
- **Undercarriage Spray Wand**: 31%
- **Mobile Pay Acceptance**: 23%
- **Coin Acceptance**: 90%
- **Ceramic Coating**: 15%
**Survey**

**Market Size**

**How far do customers come?**

- 15% 2 miles or less
- 36% 3 miles or less
- 39% 4 miles or less
- 64% 5 miles or less
- 67% 6 miles or less
- 82% 7 miles or less
- 82% 8 miles or less
- 82% 9 miles or less
- 82% 10 miles or less

**Market Income Level**

- Low: 8%
- Middle: 82%
- High: 10%

**Site Location**

- Urban: 28%
- Suburban: 41%
- Rural: 31%

**Average Monthly Gross Income and Expense**

- **2017**
  - Average Monthly Gross Income: $11,109
  - Average Monthly Expense: $4,369

- **2018**
  - Average Monthly Gross Income: $9,967
  - Average Monthly Expense: $4,066

- **2019**
  - Average Monthly Gross Income: $10,754
  - Average Monthly Expense: $4,263

- **2020**
  - Average Monthly Gross Income: $10,607
  - Average Monthly Expense: $3,986

- **2021**
  - Average Monthly Gross Income: $11,015
  - Average Monthly Expense: $4,210

**Percentage of Operators with Multiple Sites**

- 2019:
  - 1 site: 15%
  - 2 sites: 21%
  - 3 sites: 5%
  - 4 sites: 7%
  - 5 sites: 7%
  - More than 5: 5%

- 2020:
  - 1 site: 15%
  - 2 sites: 21%
  - 3 sites: 5%
  - 4 sites: 7%
  - 5 sites: 7%
  - More than 5: 5%

- 2021:
  - 1 site: 15%
  - 2 sites: 21%
  - 3 sites: 5%
  - 4 sites: 7%
  - 5 sites: 7%
  - More than 5: 8%