Auto Laundry news
THE VOICE OF THE CAR CARE INDUSTRY

Results from the Auto Laundry News 2023 Full/Flex Survey

www.carwashmag.com

SURVEY

Results From The Auto Laundry News

2023 Full/Flex Survey

The 2023 *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 Sites 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 75 percent of the total, with flex-service sites accounting for 25 percent. This compares to a 79/21 split last year and 76/24 the year before that.

Respondents continue to self-identify as to whether they belong in the full-service or flex-service category. The results bring no more clarity to the distinction than have several previous surveys. For example, only 25 percent of flex-service respondents report operating an after-care center on site; the same proportion of full-service survey participants report doing so. In a perfect world, every flex-service wash would have an after-care center.

In last year's survey, 60 percent of flex-service respondents reported vacuuming before the wash. In the current survey, 100 percent of participants in this category report vacuuming after the wash. Forty-two percent of full-service respondents report doing the same.

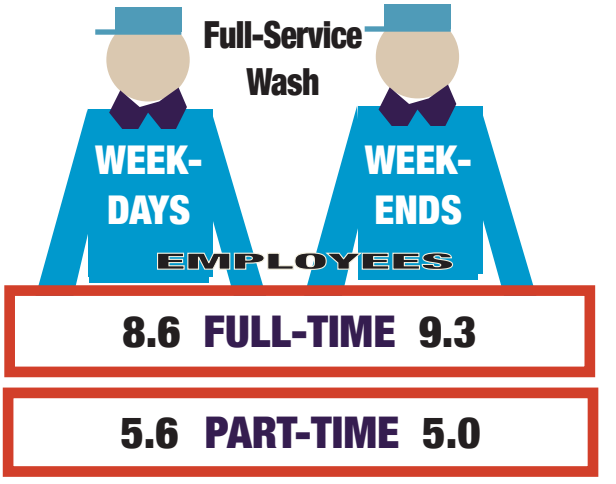
Revenues

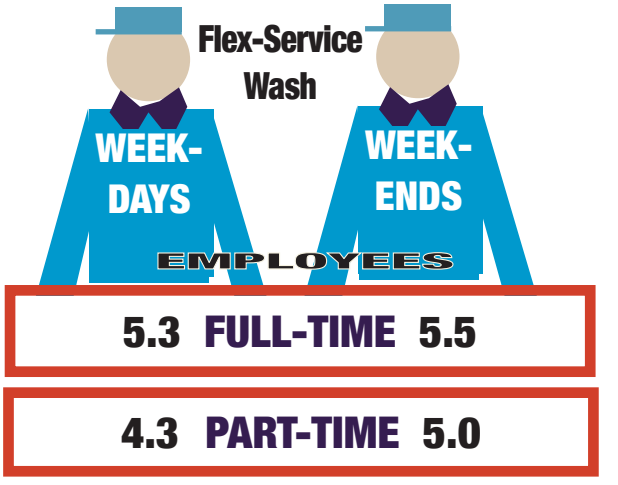
Overall, 38 percent of survey respondents report increased income compared to the previous year. This is a few steps down from last year's survey when 67 percent of participants were able to do so (the graphic on page 39 provides a six-year perspective). Flex-service sites, particularly, have extended their remarkable performance: 75 percent experienced increased income averaging 12.5 percent compared to the previous year. Only a quarter of their full-service counterparts report the same with an average increase of 13.3 percent, while fully a third experienced declining revenues averaging 12.3 percent. Not a single flex-service site saw less revenue.

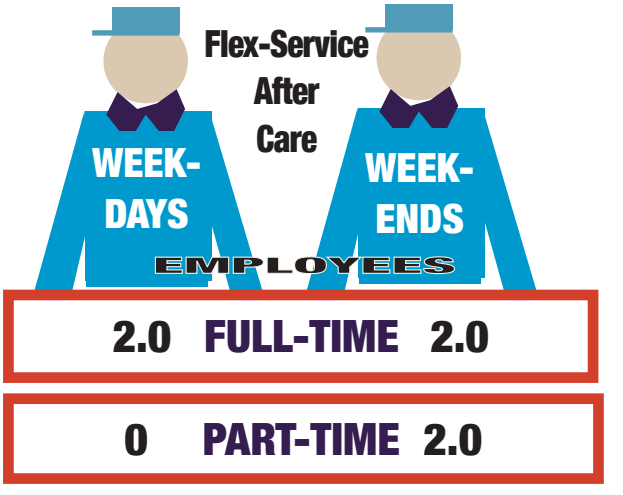
Inflation

Inflation touches everything, including car washing. Sixty-seven percent of full-service respondents increased their prices an average of 11.5 percent in 2022 because of inflation. On the flex-service side, respondents were slower to make adjustments: only a quarter upped their prices an average 10 percent in 2022.

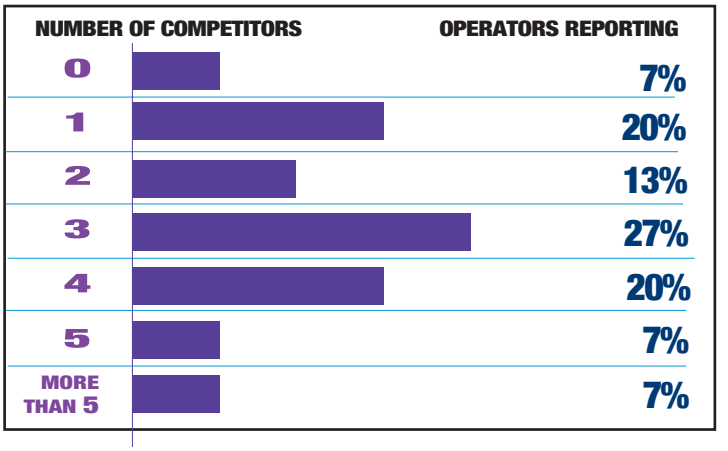
As pervasive and obstructive as inflation, supply-chain disruptions also affect the car wash industry with two thirds of full-service respondents and 75 percent of flex-service respondents report being negatively impacted.







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	11	11	11	11	19	20	17
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	12	12	14	15	18	21	9
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	*	*	*	*	*	*	*
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	11	10	11	12	21	24	13
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	14	13	13	14	19	29	6
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	12	13	13	13	17	18	14
Mid-Atlantic New Jersey-New York-Pennsylvania	14	9	9	14	16	26	12
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	8	7	16	18	18	24	9

NOTE: *Some results total more than 100 due to rounding* **Too few responses*

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	17	28	34	21
Mountain	32	19	35	15
Midwest	*	*	*	*
Central	41	23	18	18
South Central	22	26	32	22
Southeast	29	27	20	25
Mid-Atlantic	32	23	22	23
New England	45	28	16	11

NOTE: *Some results total more than 100 due to rounding* **Too few responses*

OPEN SUNDAY

Full Service	Flex Service
67%	100%

OPEN 24 HOURS

Full Service	Flex Service
0%	0%

	AVERAGE DAILY TRAFFIC	AVERAGE ANNUAL WASH
Full Service	37,100	75,200
Flex Service	32,500	73,000

AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

EXTRA SERVICES OFFERED

		Average Price	% Of Operators Offering Services
INTERIOR SANITIZING	FULL	$49.83	58%
	FLEX		0%
DETAIL	FULL	$172.85	67%
	FLEX	$212.50	100%
UPHOLSTERY CLEANING	FULL	$72.99	50%
	FLEX	$65.00	25%
QUICK LUBE	FULL	$50.00	9%
	FLEX		0%
CARPET SHAMPOO	FULL	$64.33	58%
	FLEX	$65.00	25%
EXTERIOR VINYL PROTECTANT	FULL	$24.00	42%
	FLEX	$7.50	50%
INTERIOR VINYL PROTECTANT	FULL	$32.00	42%
	FLEX	$15.00	25%
WAX AND HAND BUFF	FULL	$67.49	75%
	FLEX	$92.50	50%
WAX AND MACHINE BUFF	FULL	$111.99	50%
	FLEX	$107.50	50%

EXTRA ON-LINE SERVICES SOLD

10% TO 20% OF CARS WASHED

2018	29%
2019	22%
2020	38%
2021	31%
2022	22%

21% TO 30% OF CARS WASHED

2018	13%
2019	4%
2020	6%
2021	23%
2022	0%

31% TO 40% OF CARS WASHED

2018	0%
2019	17%
2020	25%
2021	15%
2022	31%

41% TO 50% OF CARS WASHED

2018	13%
2019	22%
2020	6%
2021	8%
2022	8%

51% TO 60% OF CARS WASHED

2018	4%
2019	22%
2020	6%
2021	0%
2022	8%

OVER 60% OF CARS WASHED

2018	42%
2019	13%
2020	19%
2021	23%
2022	31%

OPERATE FREESTANDING AFTER-CARE CENTER

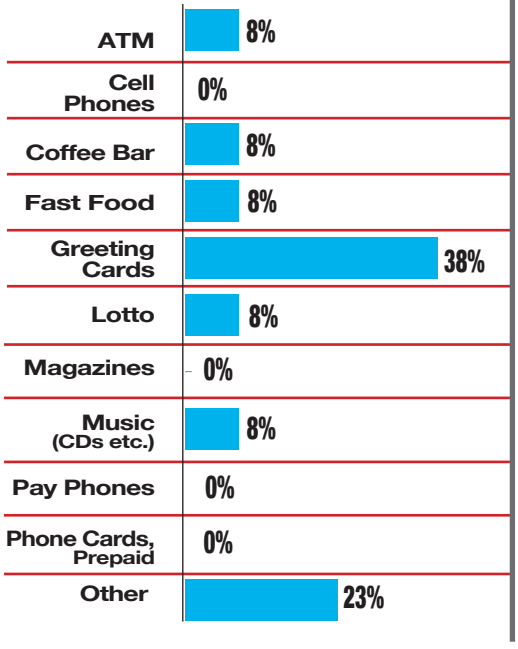
FULL SERVICE	FLEX SERVICE
25%	25%

OPERATE COIN-OP BAYS ON SITE

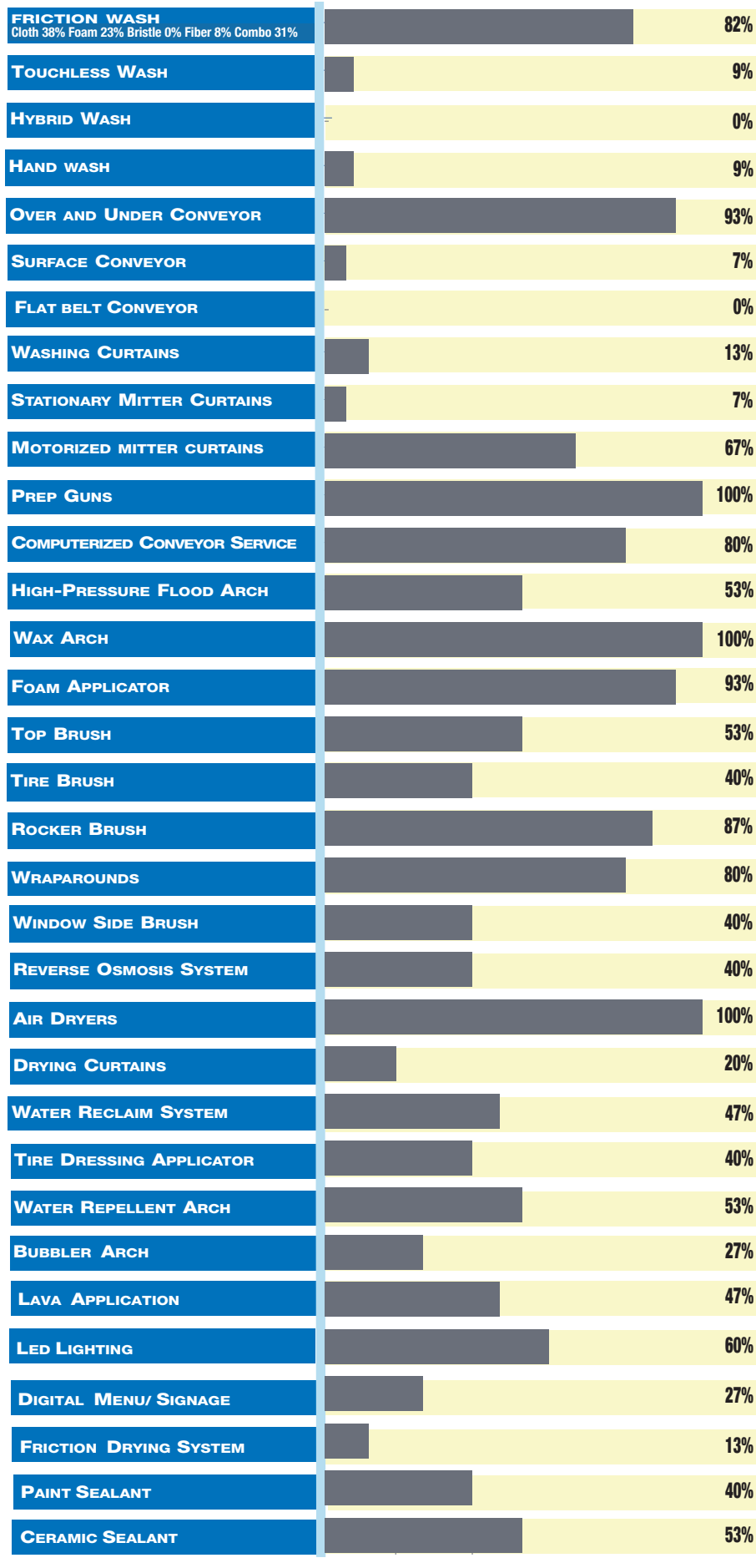
FULL SERVICE	FLEX SERVICE
8%	25%

AVERAGE NUMBER OF BAYS	
5	8

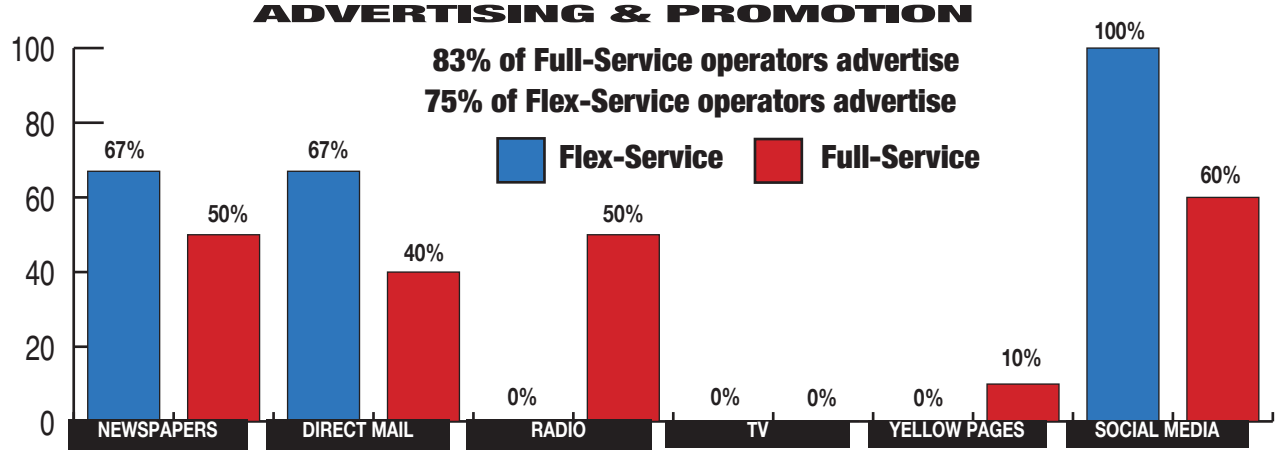
NON-AUTO PROFIT CENTERS ON SITE

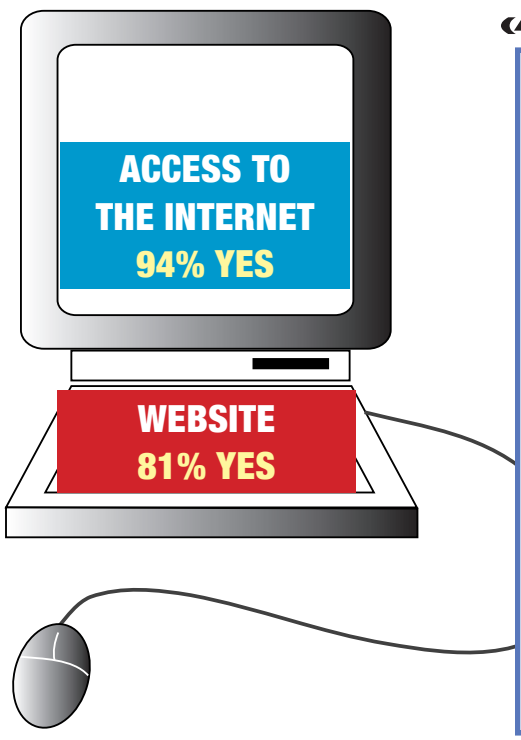


PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

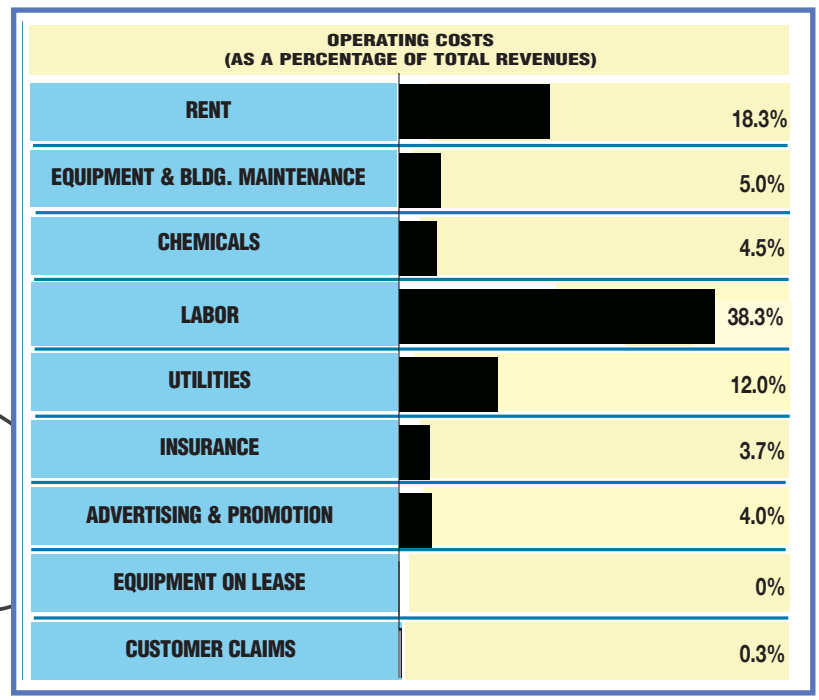


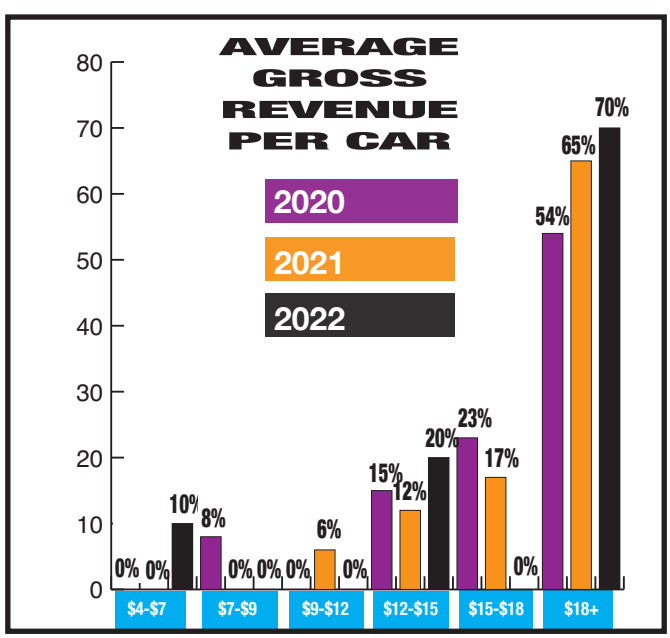
ADVERTISING & PROMOTION

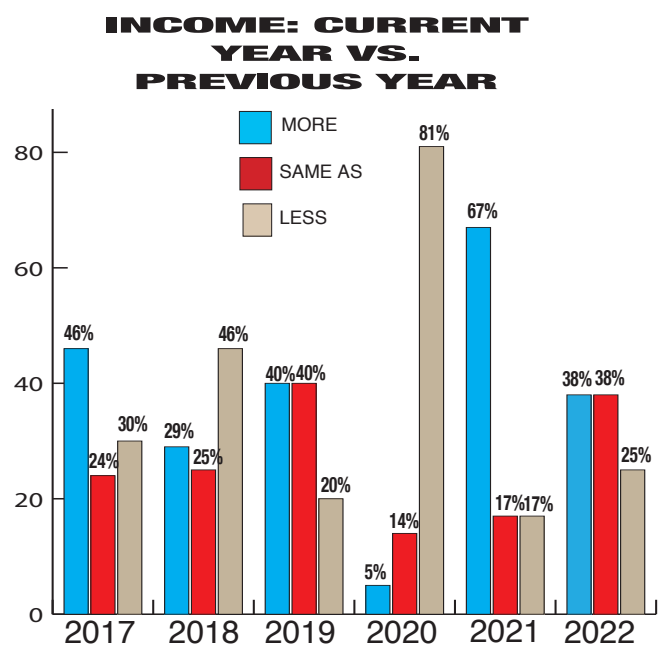




OPERATING COSTS
(AS A PERCENTAGE OF TOTAL REVENUES)



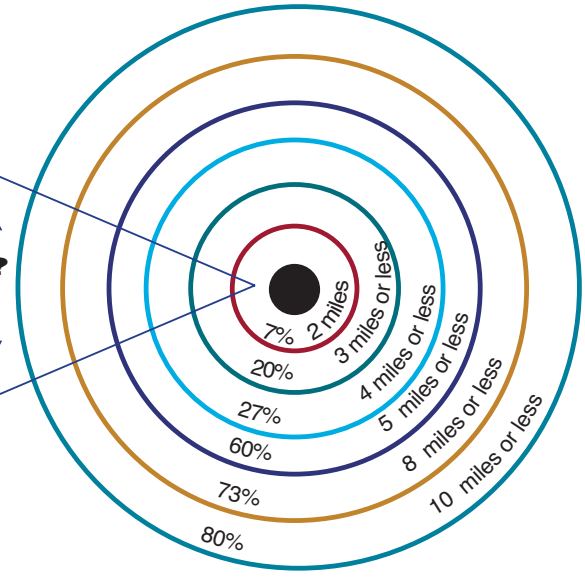


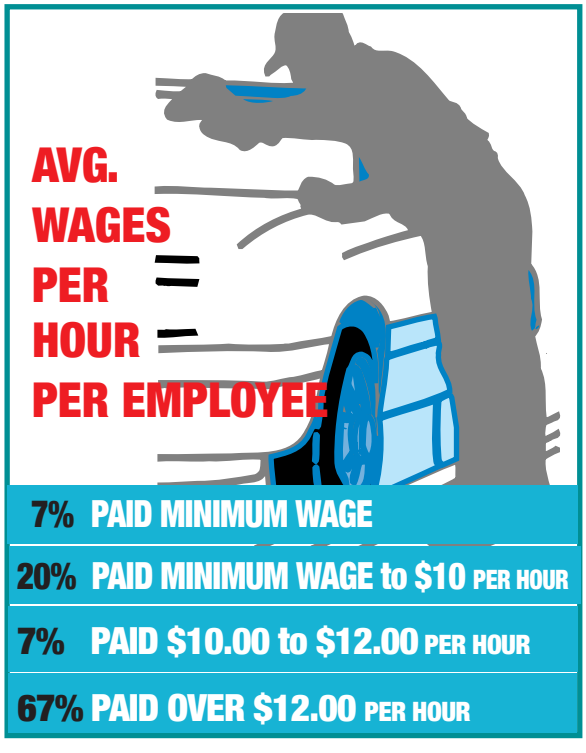


SURVEY

HOW FAR DO CUSTOMERS COME?

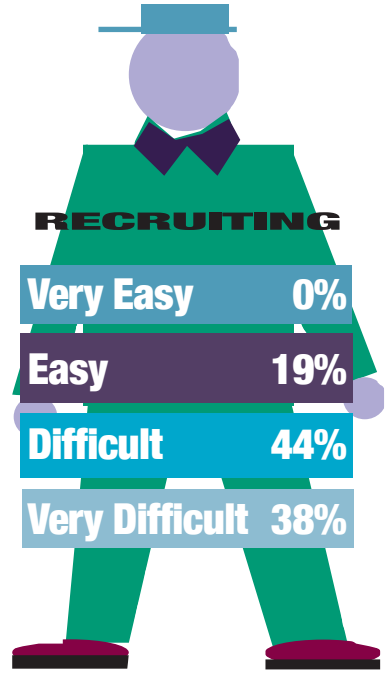
(% from within 2-mile radius, 3-mile radius, etc.)





AVG. WAGES PER HOUR PER EMPLOYEE

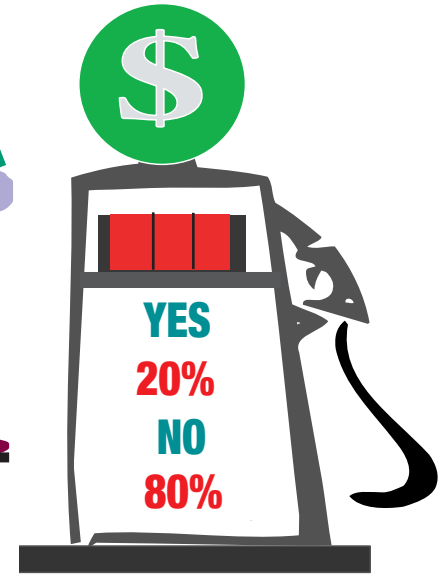
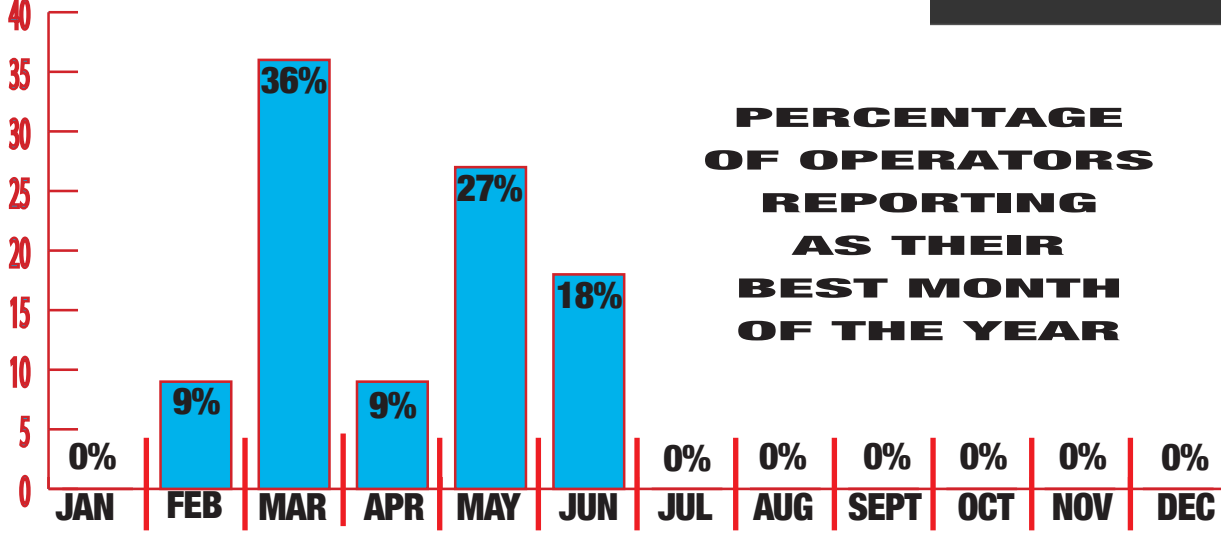
7%	PAID MINIMUM WAGE
20%	PAID MINIMUM WAGE to $10 PER HOUR
7%	PAID $10.00 to $12.00 PER HOUR
67%	PAID OVER $12.00 PER HOUR



RECRUITING

Very Easy	0%
Easy	19%
Difficult	44%
Very Difficult	38%

OPERATORS SELLING GASOLINE



PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR