AutoLaundry news
THE VOICE OF THE CAR CARE INDUSTRY

Results from the Auto Laundry News

2023 Self-Service Survey

www.carwashmag.com

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2023 Self-Service Survey

The 2023 *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 51 percent of the total response; those without account for 49 percent. In last year's survey the split was 56/44.

Revenues

Overall, 34 percent of respondents report increased income compared to the previous year — a notable drop from the 46 percent who reported such gains in last year's survey, which percentage broke a trend of declining income established over the previous four surveys. While this year's reversal alone is unfortunate, it is also the fifth year in a row that a minority of survey respondents, overall, report income growth compared to the previous year.

After declining for two years in a row, the percentage of respondents who report a year-over-year decrease in income has increased substantially to 32 percent from 13 percent last year and 21 percent the year before that. The graphic on page 55 provides a six-year perspective.

In a reversal of last year, sites without outperformed sites with in the current survey: 38 percent of the former reports increased income over the previous year, a near-duplicate performance of last year's 37 percent. Only 30 percent of sites with managed to up their income compared to 52 percent who did so last year. Nineteen percent of sites without report declining income (19 percent last year), while 43 percent of sites with do so (10 percent last year).

Equipment

Overall, 27 percent of respondents are planning to purchase new equipment during the 12 months ahead. This compares to 33 percent who had such plans last year. In the current survey, sites with are more likely to shop than their counterparts without in-bay automatics: 31 percent versus 24 percent. This difference is not as pronounced as it was last year, when 41 percent of sites with had purchasing plans compared to 24 percent of sites without. New in-bay automatics remain a favorite on the shopping list. The graphic below shows more detail.

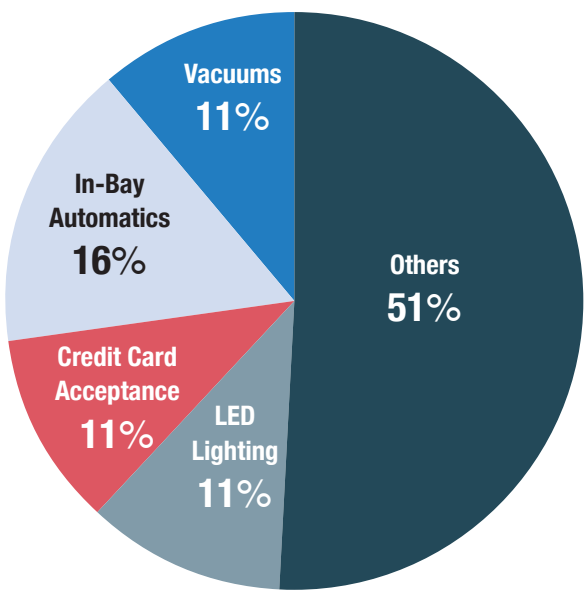
As they did last year, sites with and sites without report adding new equipment during the previous 12 months in near equal numbers in the current survey: 23 percent and 20 percent, respectively.

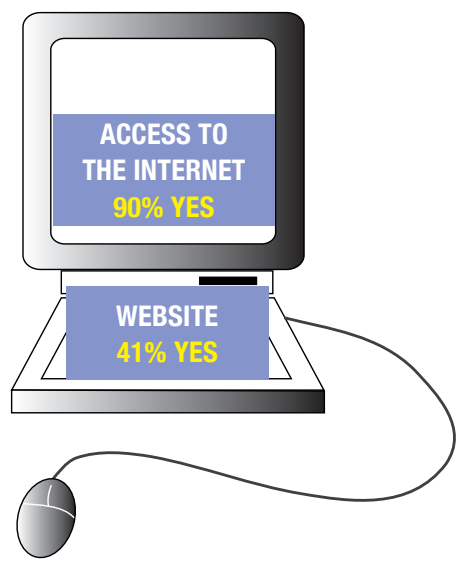
Inflation

Car washes are not exempt from the impact of inflation. Sixty-five percent of sites with report increasing their prices an average of 15.5 percent in 2022 because of inflation. Sites without were slower to make adjustments: only 36 percent upped their prices an average 15.7 percent in 2022.

NEW EQUIPMENT

27% of operators plan to add equipment in the next 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	17	23	37	23
Mountain	23	27	30	21
Midwest	23	33	18	25
Central	31	23	24	21
South Central	21	29	24	26
Southeast	23	31	18	28
Mid-Atlantic	36	33	14	18
New England	35	26	22	18

NOTE: Some results do not total 100 due to rounding

* *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

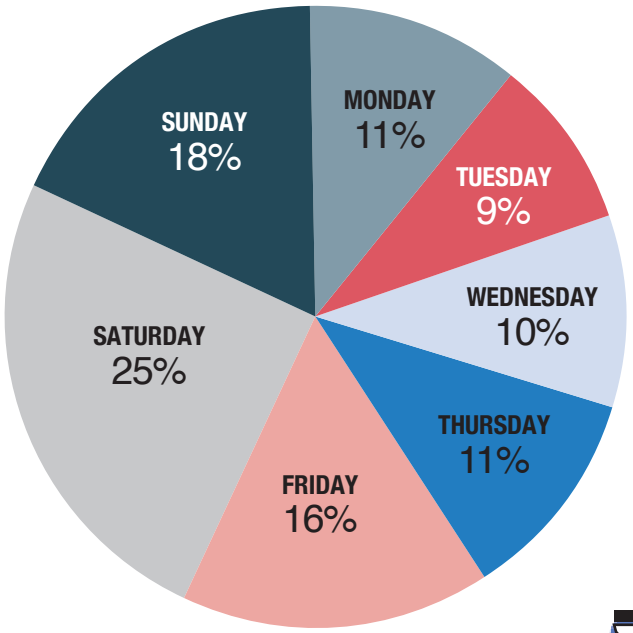
South Central
Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

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

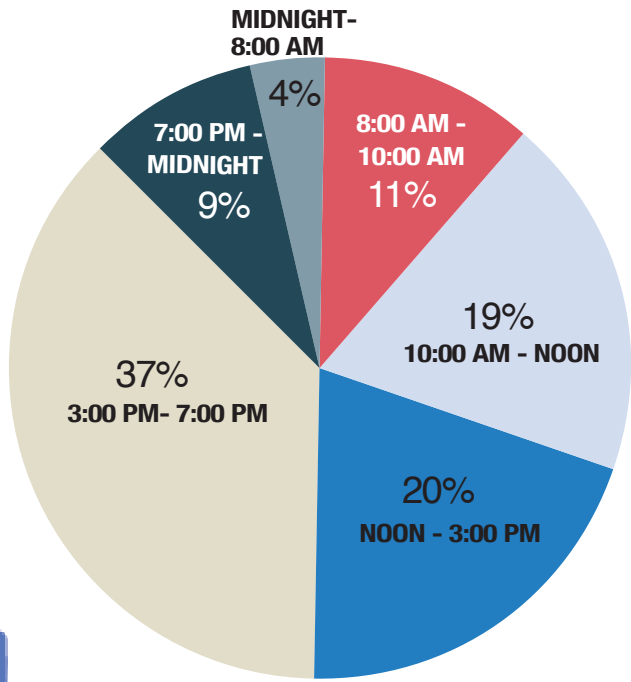
Mid-Atlantic
New Jersey-New York-Pennsylvania

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

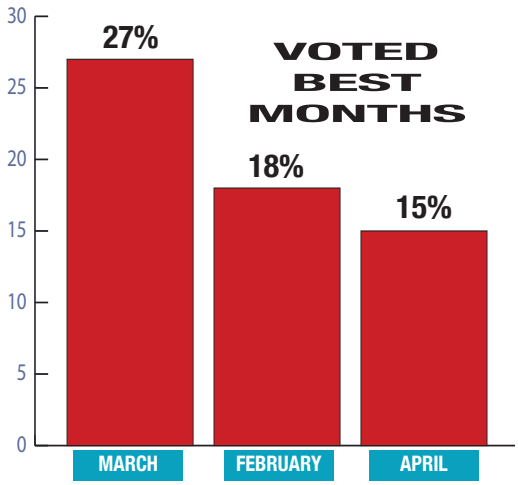
PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



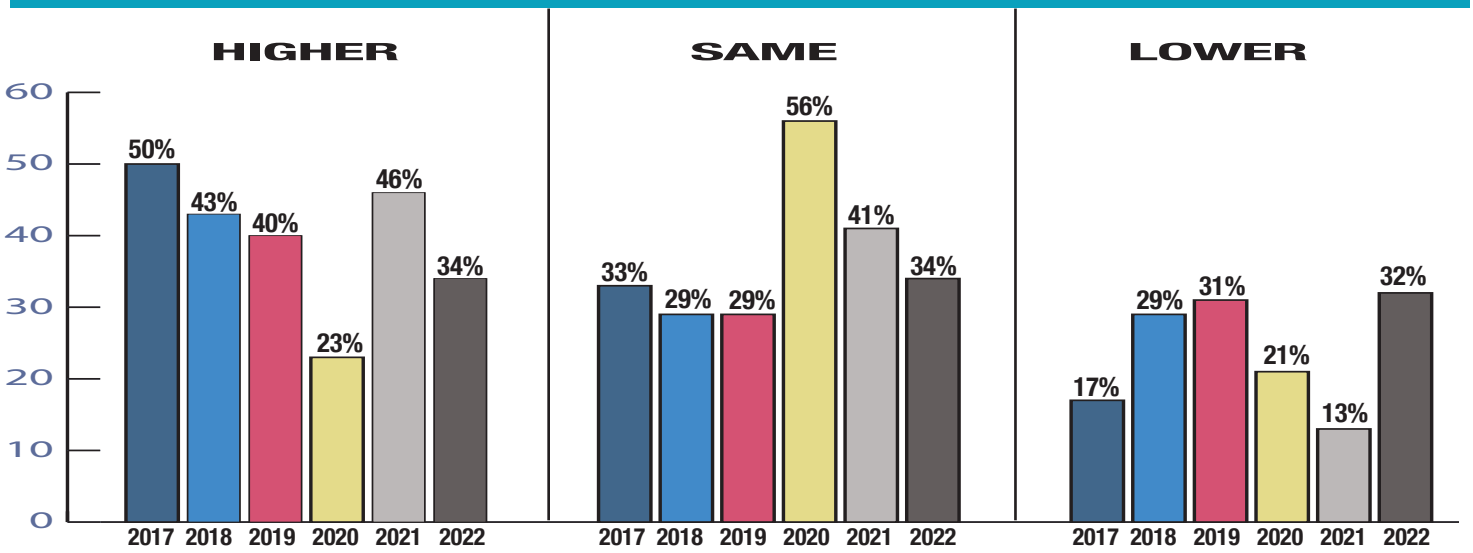
VOTED BEST MONTHS



ATTENDANT

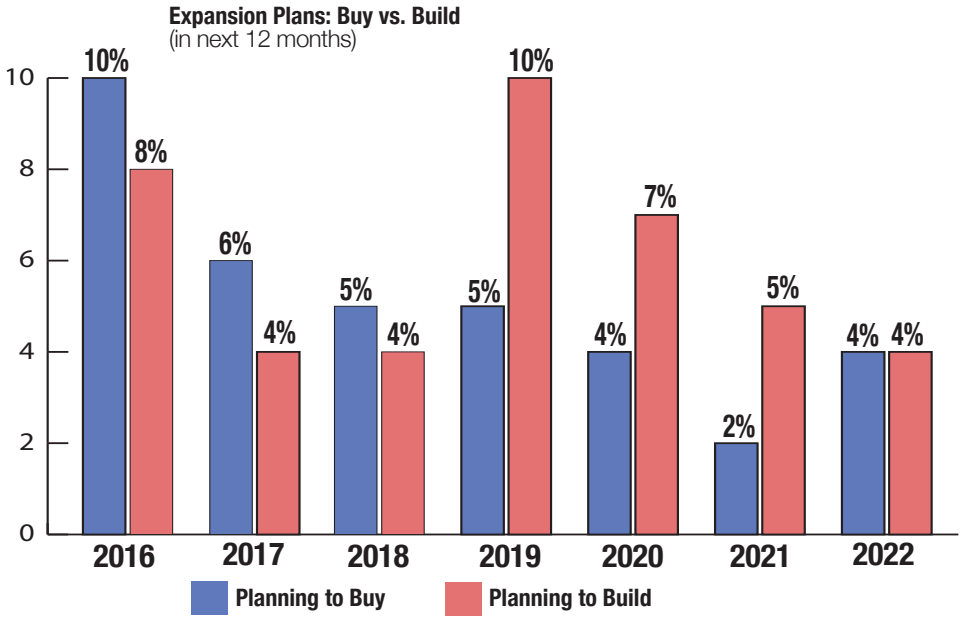
	2018	2019	2020	2021	2022
FULL-TIME	19%	15%	13%	19%	19%
PART-TIME	31%	50%	42%	42%	51%
NONE	50%	35%	45%	39%	30%

INCOME (COMPARED TO PREVIOUS YEAR)



EXPANSION PLANS

BUY VS. BUILD



HOURS OF OPERATION

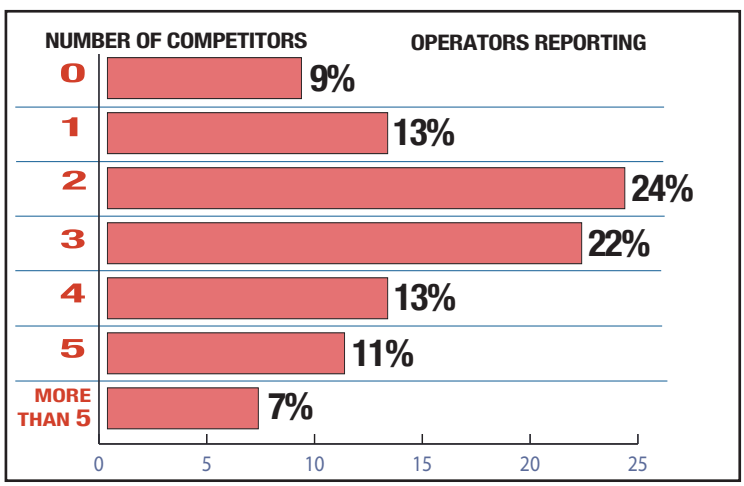
OPEN SUNDAYS

94%

OPEN 24 HOURS

82%

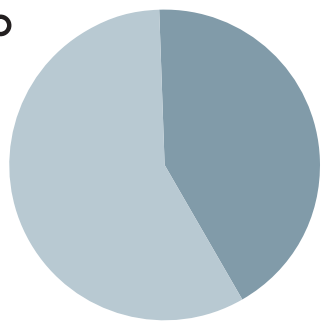
COMPETING SELF-SERVE IN AREA



RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/ SELF-SERVICE FACILITY

58%

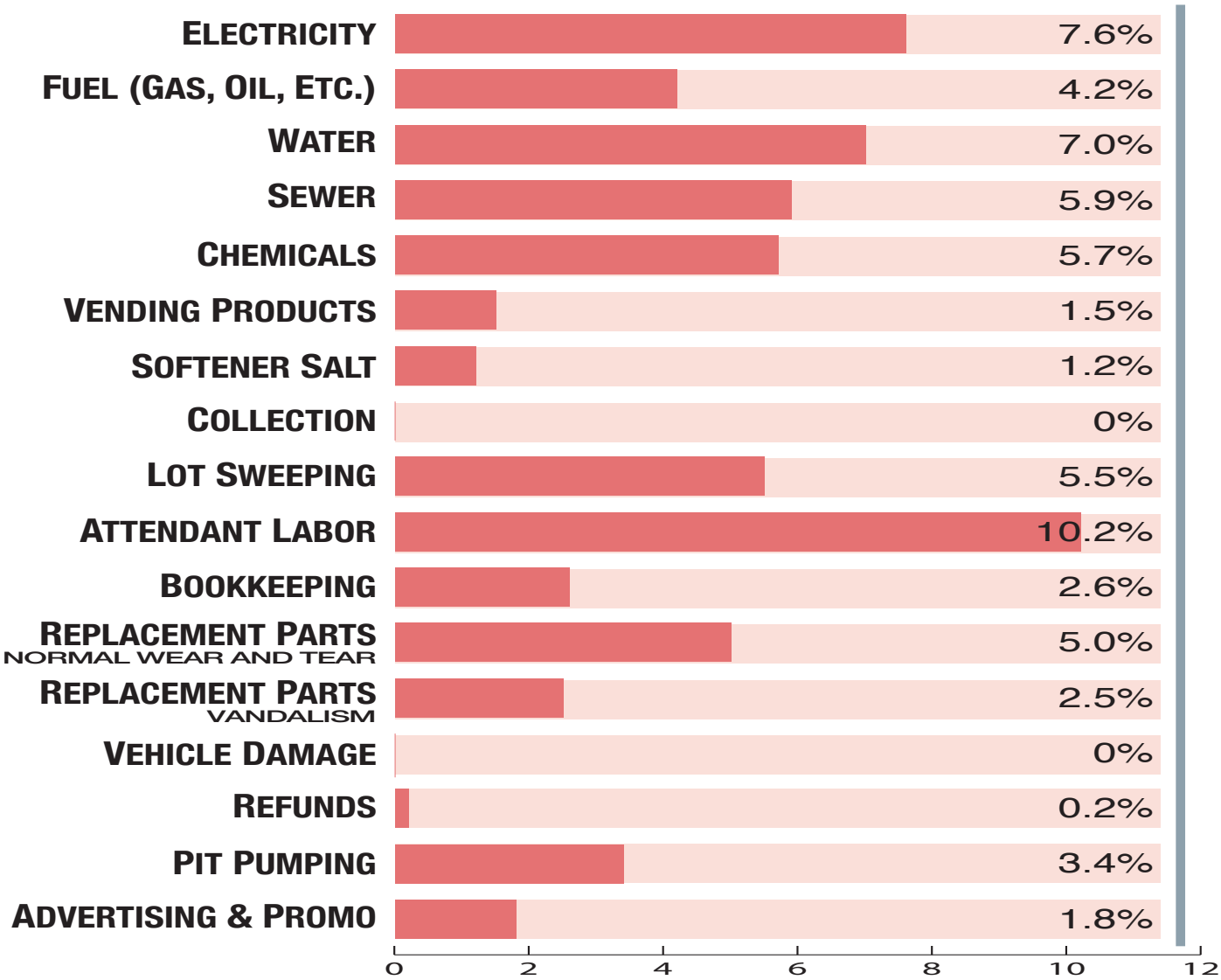
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



42%

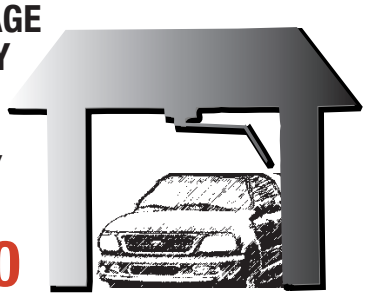
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

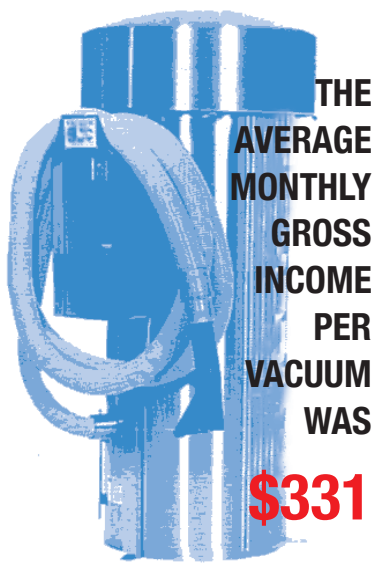
EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



THE AVERAGE MONTHLY GROSS INCOME PER BAY WAS

$1,810





THE AVERAGE MONTHLY GROSS INCOME PER VACUUM WAS

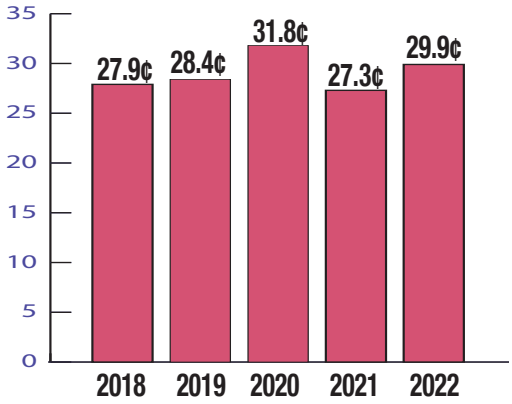
$331

THE AVERAGE MONTHLY GROSS INCOME FOR VENDING WAS

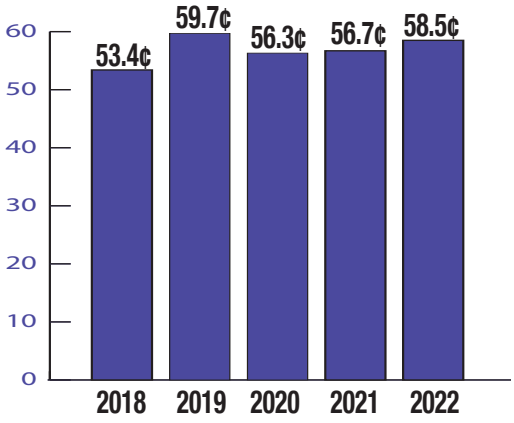
$352

PRICE

VACUUMS
PRICE PER MINUTE



WASH BAYS
PRICE PER MINUTE

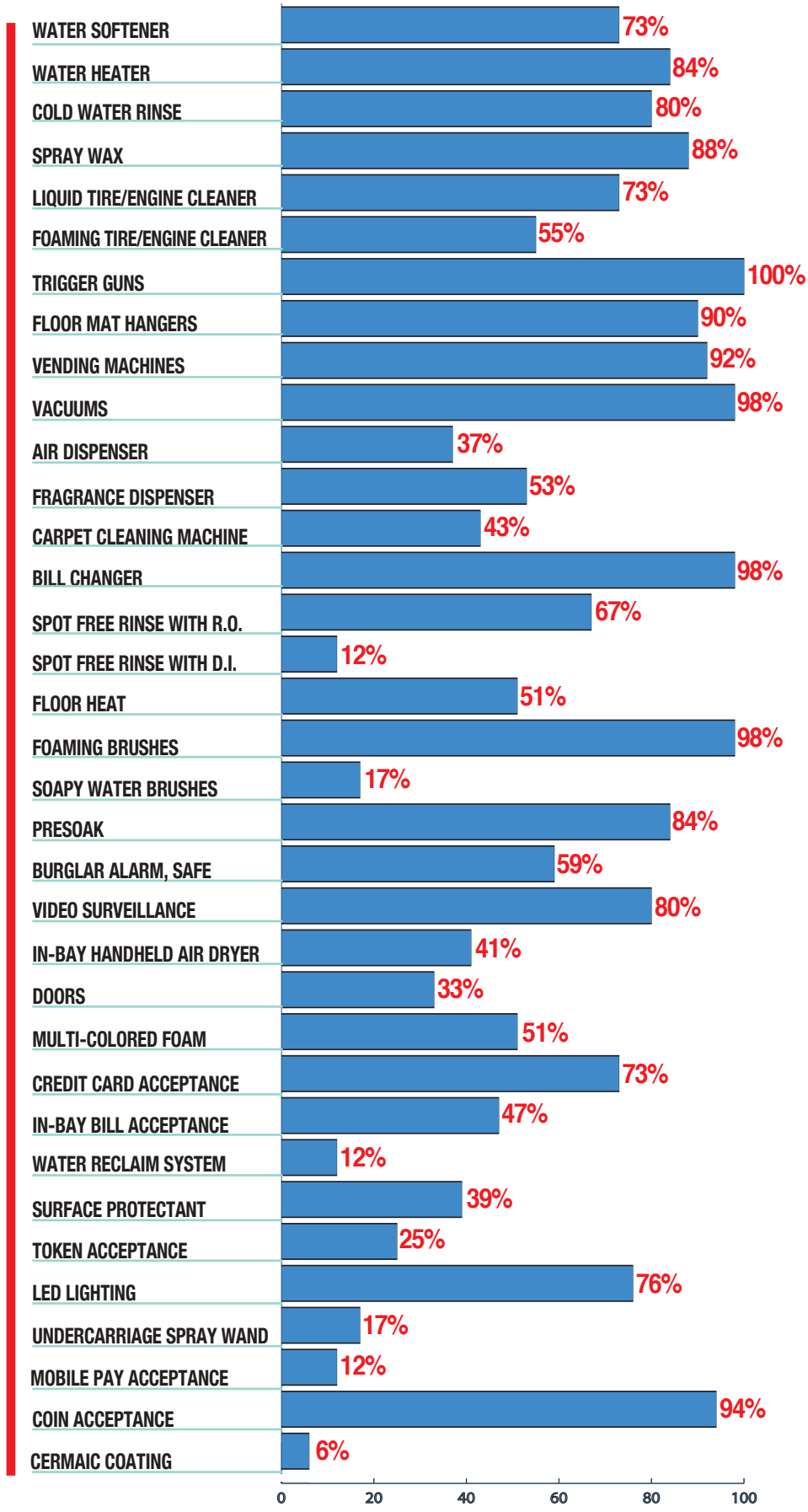


EXPRESS EXTERIOR NEARBY

No 33%
Yes 67%

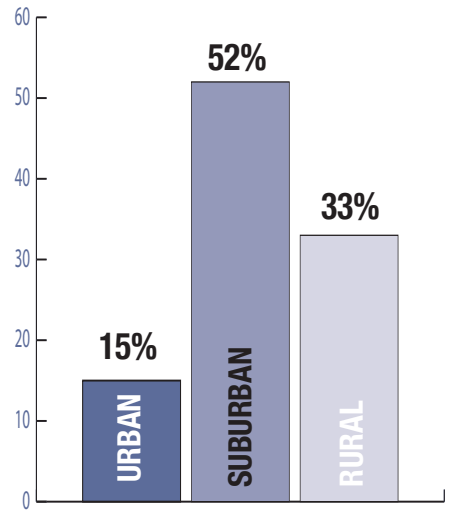
HAS HURT BUSINESS	HAS NOT HURT BUSINESS
29%	71%

CURRENT EQUIPMENT

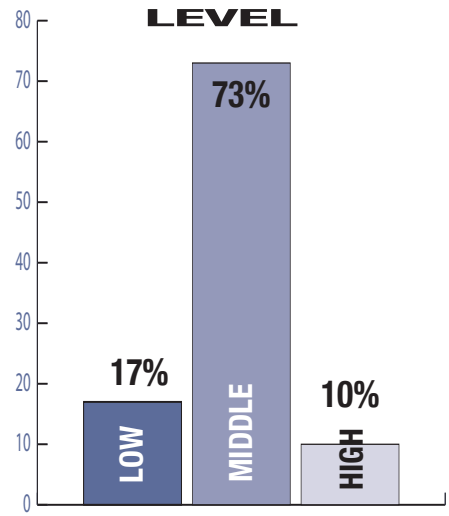


SURVEY

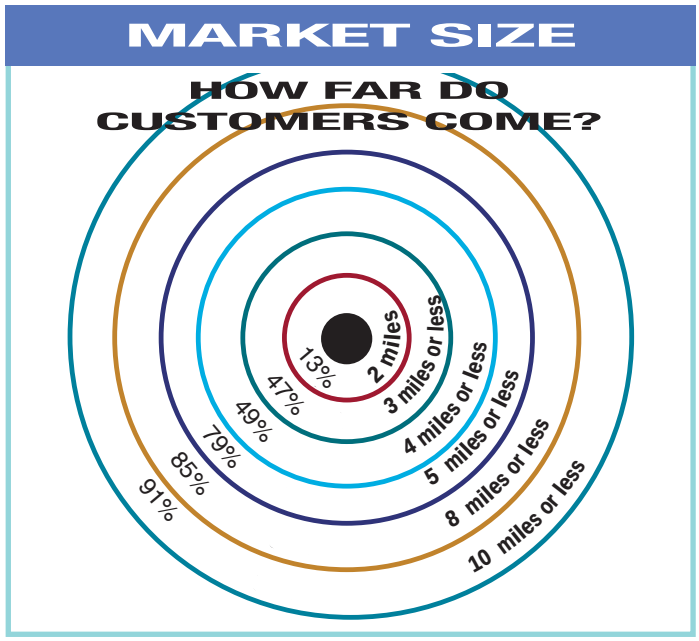
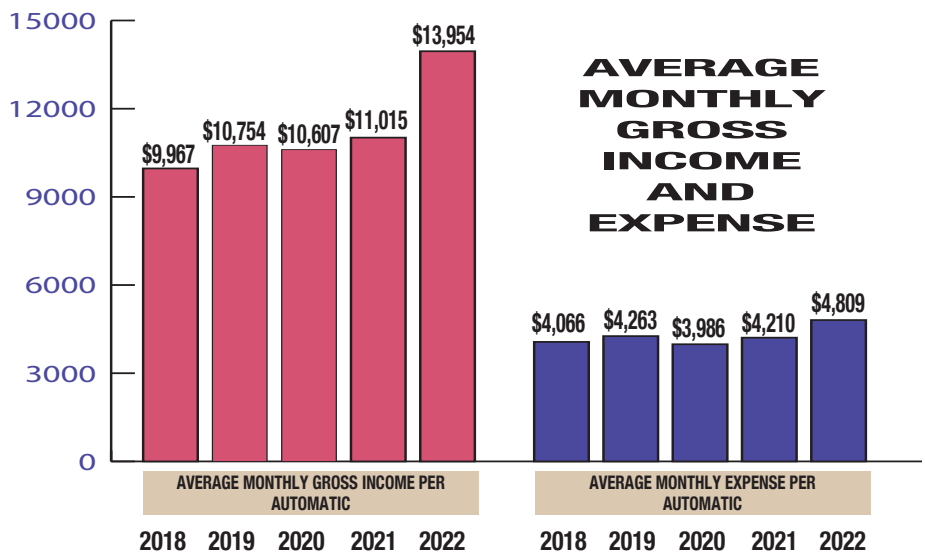
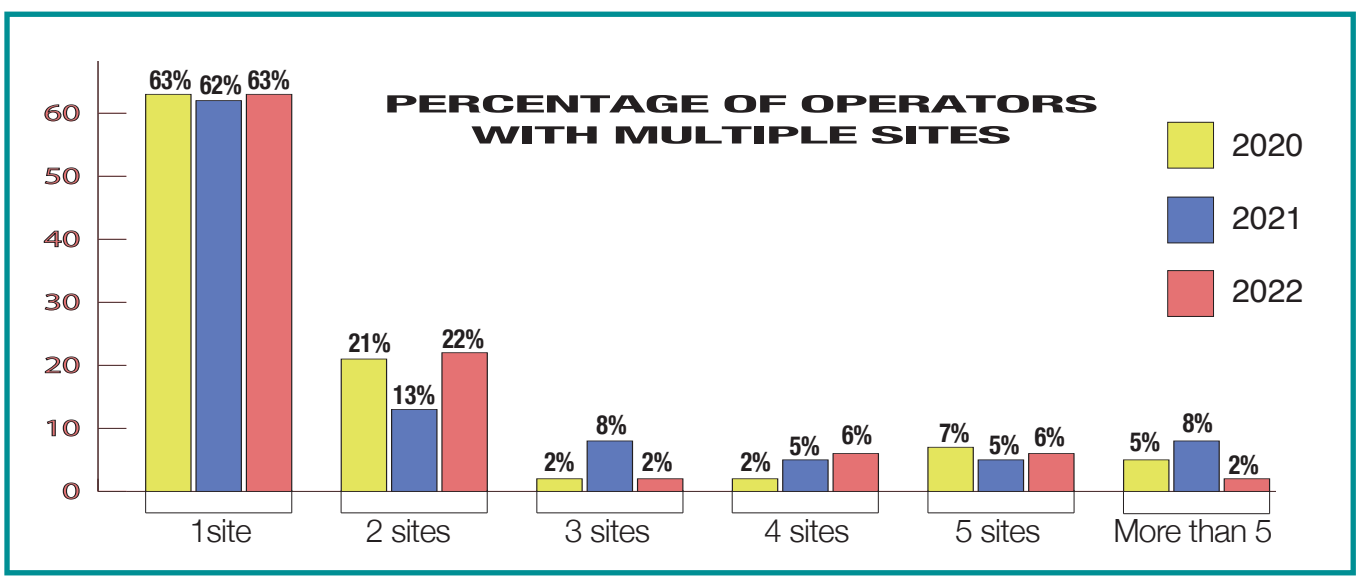
SITE LOCATION



MARKET INCOME LEVEL



MARKET SIZE



AUTOMATICS