Auto Laundry news
THE VOICE OF THE CAR CARE INDUSTRY

Results from the
Auto Laundry News

2023 In-Bay Automatic Survey

www.carwashmag.com

SURVEY

2023 AUTOMATIC SURVEY

The 2023 *Auto Laundry News* In-Bay Automatic Survey was conducted by randomly mailing questionnaires to subscribers who own and/or operate in-bay automatic car wash equipment. The information in this survey results from an analysis of data provided by respondents throughout the United States.

On occasion, for purposes of comparison, survey responses from sites with self-serve wand bays (sites-with) and sites without this type of equipment (sites-without) are tabulated separately. In the current survey, participating locations with self-serve wand bays accounted for 71 percent of the total response. Last year, 73 percent of participants reported operating self-serve bays.

Wash Volume

Forty-four percent of those surveyed report an increase in wash volume over the previous year. This is down slightly from last year when 50 percent reported a year-over-year increase. The graphic on page 34 provides a seven-year perspective. Twenty percent of in-bay operators report a decrease in wash volume, which is a slight improvement over last year's 21 percent result. It also represents a marked improvement over the recent past (2018-2021) when, on average, 33 percent endured a reduction in the number of cars visiting their bays.

Sites-with continue to grow wash volume at an inflated rate compared to their sites-without counterparts. This year, exactly half of sites-with (50 percent) reported an increase in wash volume, while around a third (29 percent) of sites-without reported the same. Last year, 60 percent of sites-with reported increases, while just 25 percent of sites-without reported traffic growth. While fewer sites-with survey respondents enjoyed increased volume this year compared to last, the overall trend of traffic growth we have seen for sites-with over the past few years continues.

Less than 1 in 5 (17 percent) of sites-with operators reported a decline in volume, while 28 percent of sites-without experienced a drop in wash volume. This is a marked improvement for sites-without operators compared to last year when 50 percent reported a year-over-year drop in cars washed.

Revenue

Overall, the average gross revenue per in-bay customer is $10.19, up 29 cents from last year's $9.90 result. Sites-with reported an average per-car ticket of $10.09, while sites-without tallying a $10.44 per-ticket average. This is a reversal of last year's results where sites-with ($10.07) outpaced sites-without ($9.48) in average per-car ticket.

Future

Respondents remain cautious with capital expenditures this year, with just 31 percent reporting plans to purchase new equipment in the next 12 months. This is on par with last year, when 27 percent reported equipment purchase plans. However, it is far off the pace of two years ago, when 42 percent reported plans to upgrade their equipment.

Of those that plan to upgrade their equipment over the next year, 33 percent plan to purchase vacuums, 25 percent dryers, 25 percent in-bay automatic equipment, and the remaining 17 percent plan to purchase new self-serve equipment.

Just 14 percent of those surveyed plan to build a new wash over the next 12 months — this relatively small percentage is double the 7 percent that planned to build last year. Of those that plan to build in the next 12 months, half are planning in-bay automatics, and a quarter each plan to build an express exterior or self-serve location.

Continued on page 40

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK

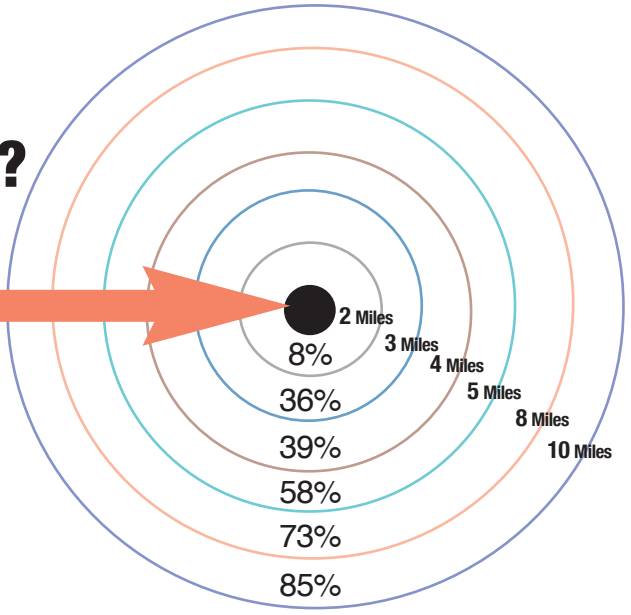
	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific & Mountain Alaska-Arizona-California-Colorado-Hawaii-Idaho-Montana-Nevada-New Mexico-Oregon-Utah-Washington-Wyoming	12	12	12	12	18	18	15
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota-Wisconsin	13	15	11	12	16	16	17
Central Illinois-Indiana-Michigan-Ohio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

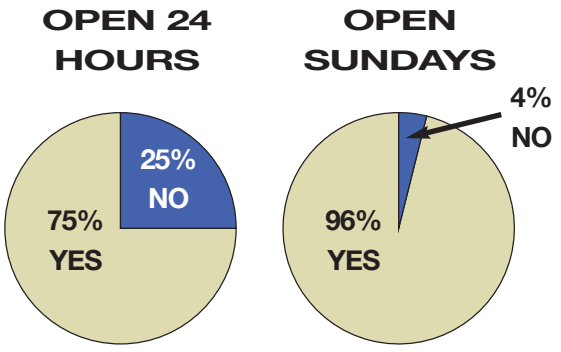
NOTE: Some results do not total 100 due to rounding ***Too Few Responses**

SURVEY

How Far do Customers Come?

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

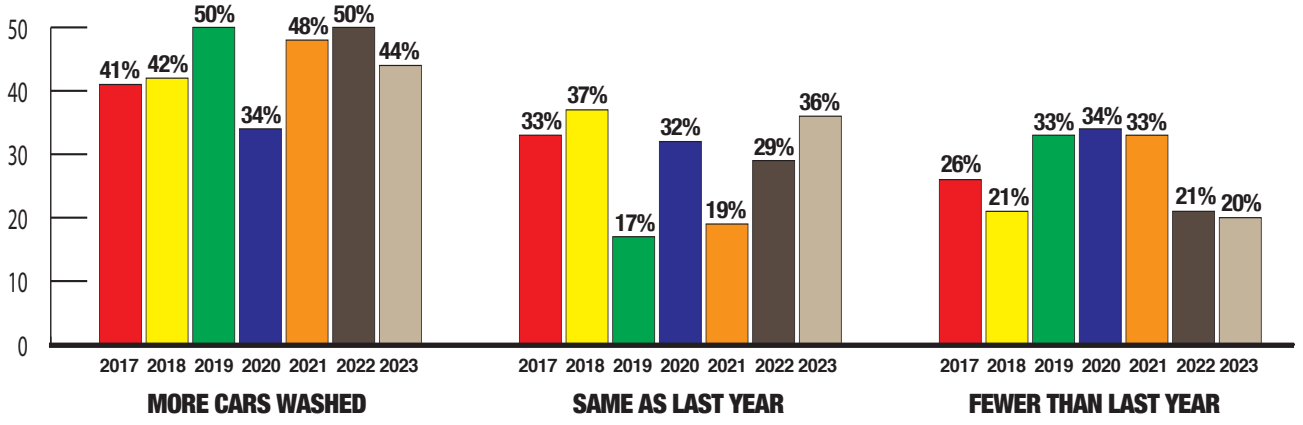




AVERAGE DAILY TRAFFIC COUNT AT BEST SITE

19,552

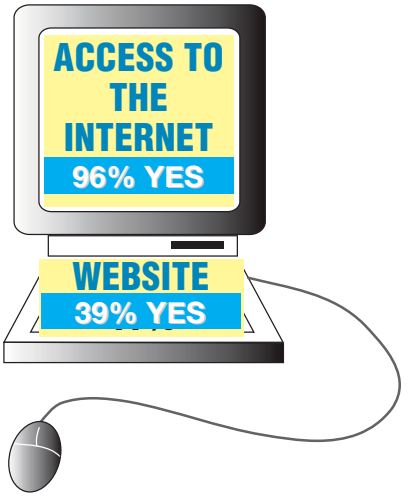
WASH VOLUME COMPARED YEAR TO YEAR (IN-BAY AUTOMATICS)



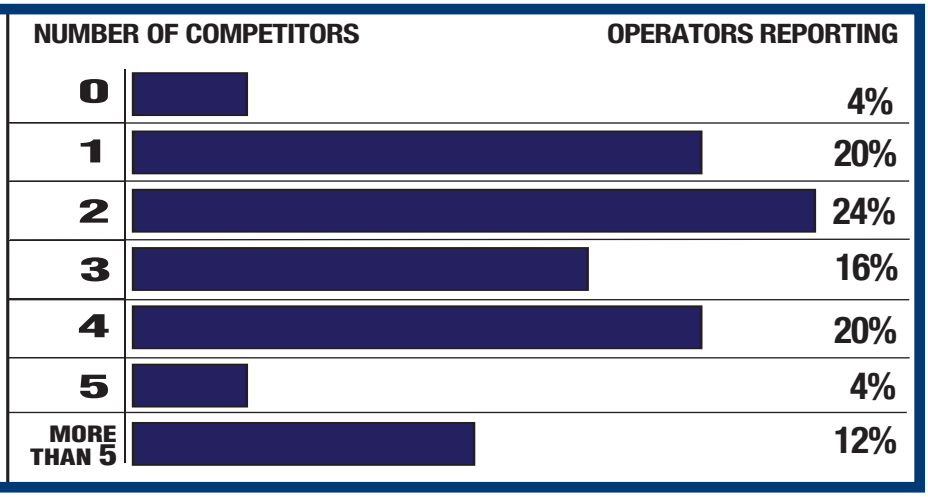
PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific & Mountain	23	23	33	23
Midwest	27	30	23	22
Central	25	40	15	20
South	25	31	18	26
Mid-Atlantic	31	31	19	19
New England	45	28	20	8

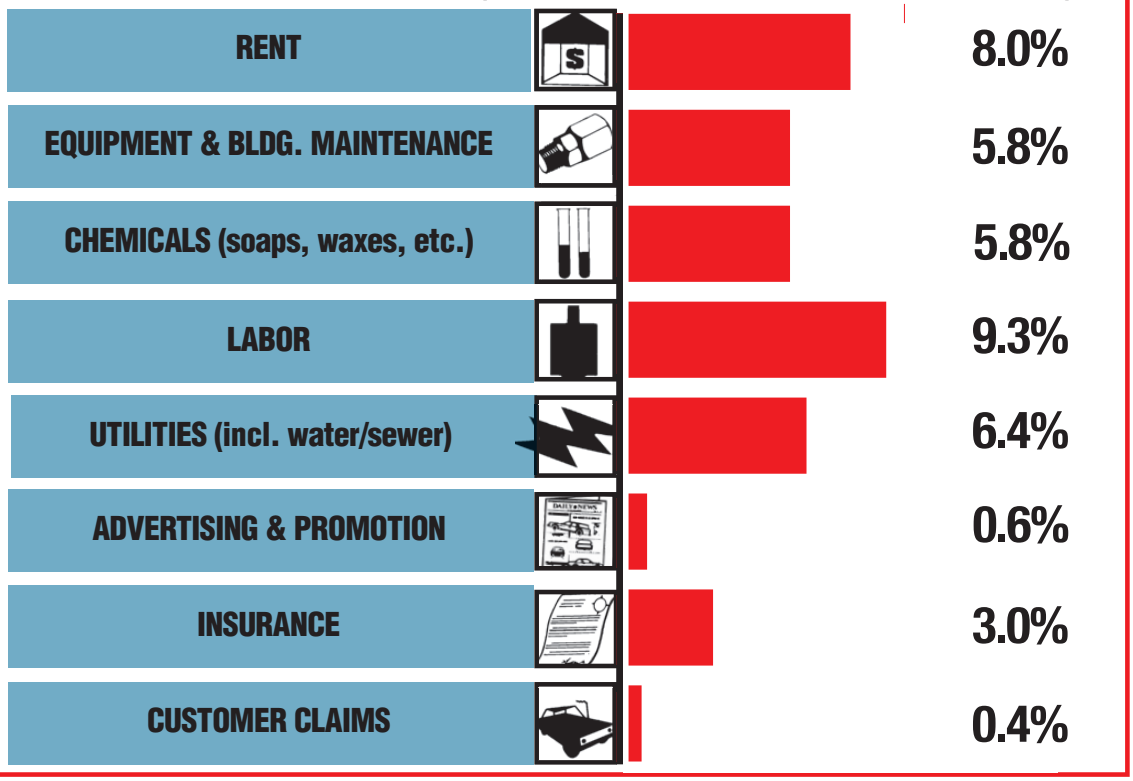
NOTE: Some results do not total 100 due to rounding *Too Few Responses



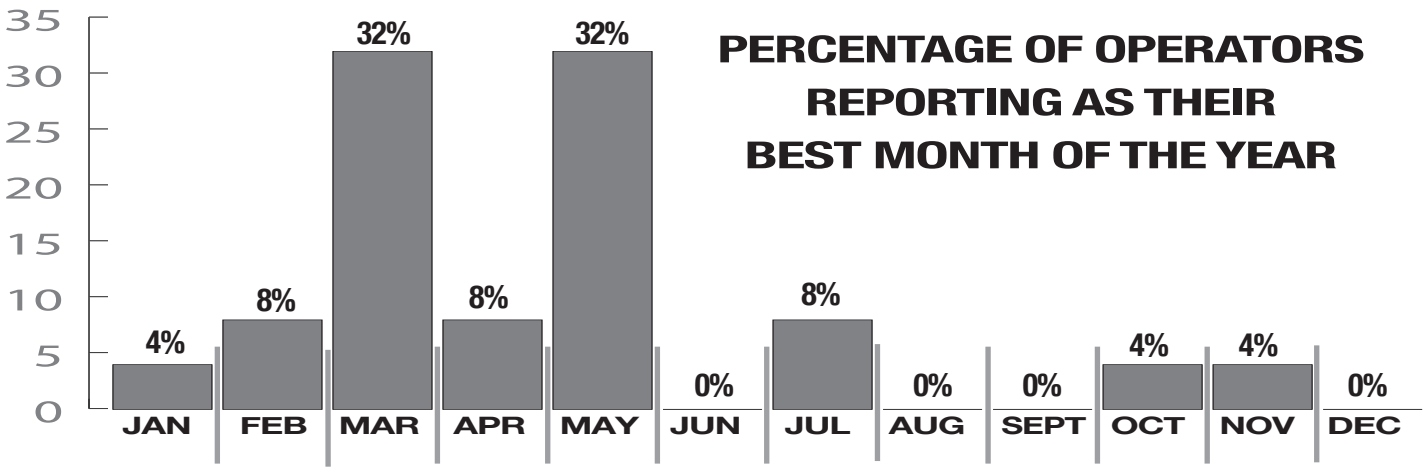
COMPETING WASHES IN AREA OVERALL



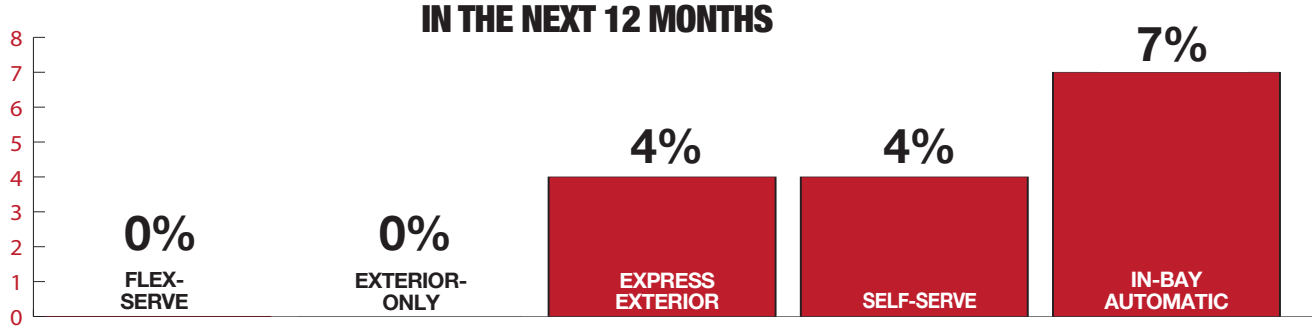
OPERATING COSTS (PER MONTH AS A PERCENTAGE OF TOTAL REVENUES)



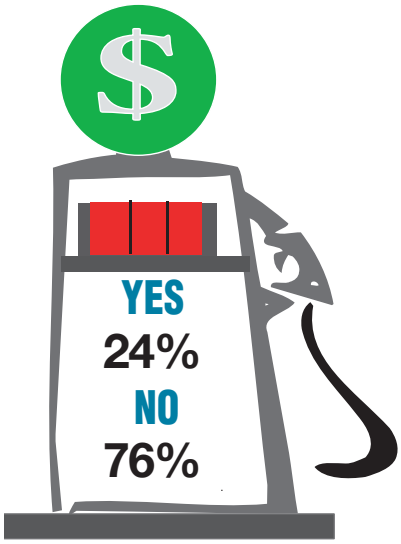
PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR



OPERATORS WHO PLAN TO BUILD MORE WASHES IN THE NEXT 12 MONTHS

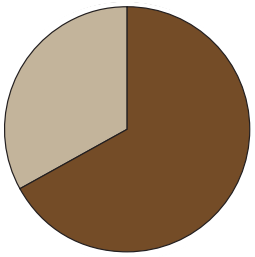


OPERATORS SELLING GASOLINE



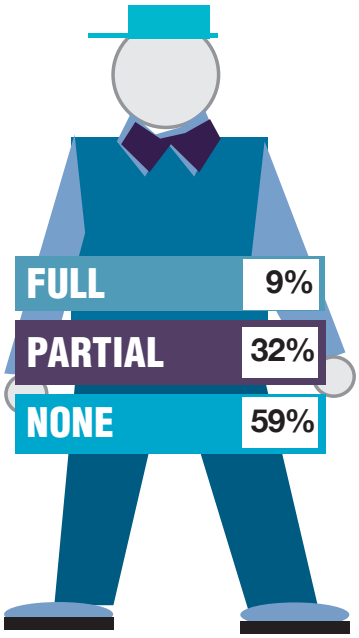
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/ SELF-SERVICE FACILITY

33%
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

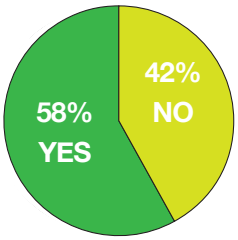


67%
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

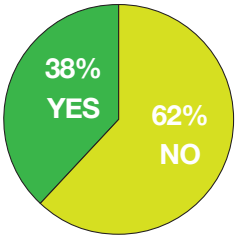
EMPLOYEE UNIFORMS



EXPRESS EXTERIOR



Present in Market Area



Has Hurt Business

AVERAGE MONTHLY GROSS INCOME PER SELF-SERVE BAY

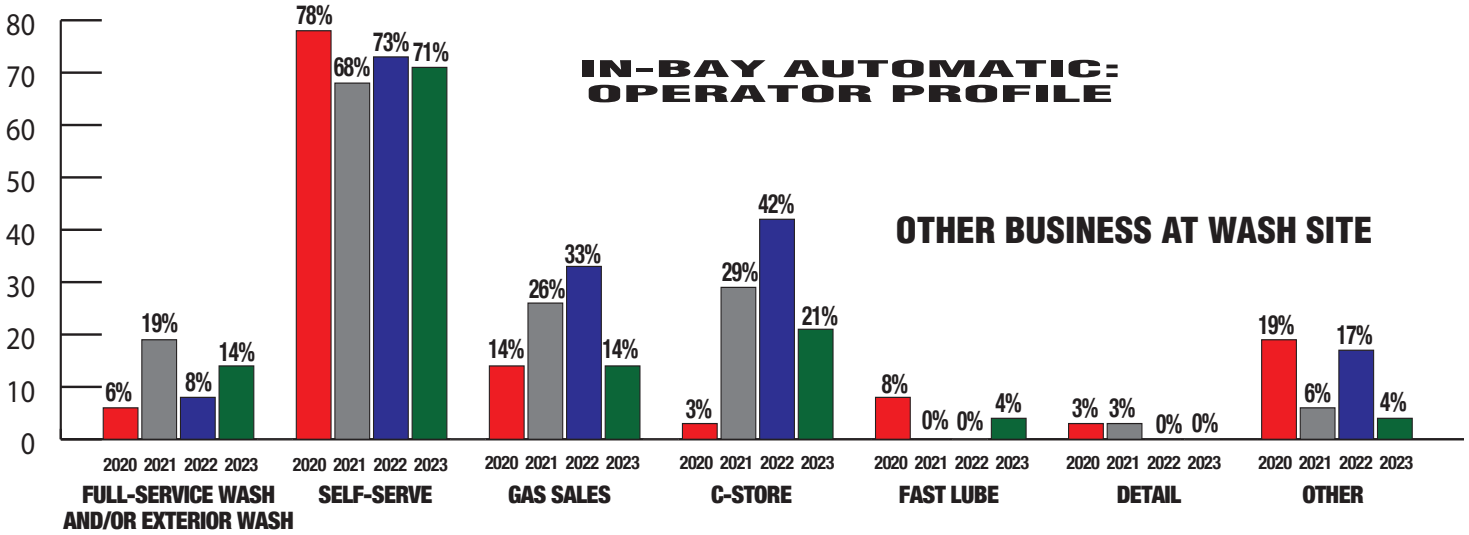
$1,709

AVERAGE NUMBER OF CARS WASHED ANNUALLY PER AUTOMATIC

21,800

SURVEY

IN-BAY AUTOMATIC: OPERATOR PROFILE



OTHER BUSINESS AT WASH SITE

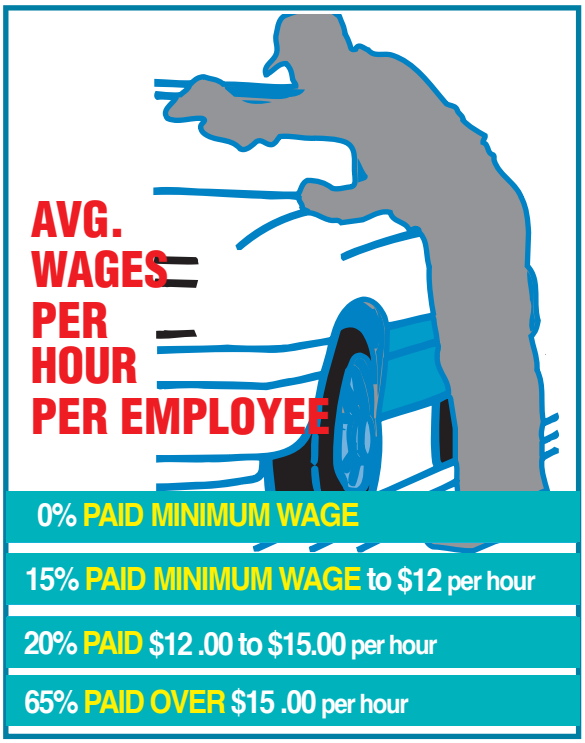
AUTOMATIC REVENUES

AVERAGE GROSS REVENUE PER IN-BAY CUSTOMER

$10.19

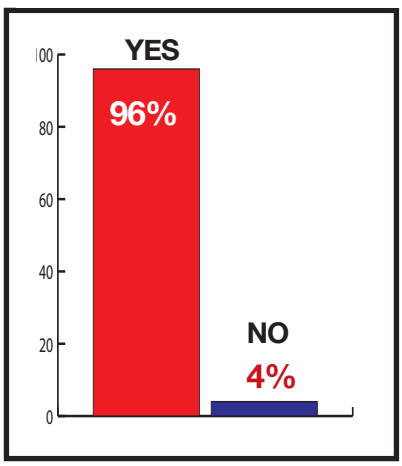
$353

LABOR COSTS



DRYING CYCLE OFFERED

AVERAGE DRYING CYCLE PRICE $1.00



CUSTOMERS PURCHASING DRYING CYCLE	OPERATORS REPORTING
UNDER 10%	0%
11%-25%	0%
26%-40%	0%
41%-55%	0%
56%-70%	10%
OVER 70%	90%

Continued from page 33

Respondent Profile

Tables 1 and 2 (below) offer year-by-year comparisons of operator experience levels and multiple site ownership.

Table 1 Length of Experience	2023	2022	2021	2020
Under 5 years	4%	14%	6%	11%
5 - 10 years	25%	14%	13%	14%
11 - 20 years	18%	21%	29%	39%
Over 20 years	53%	50%	52%	36%

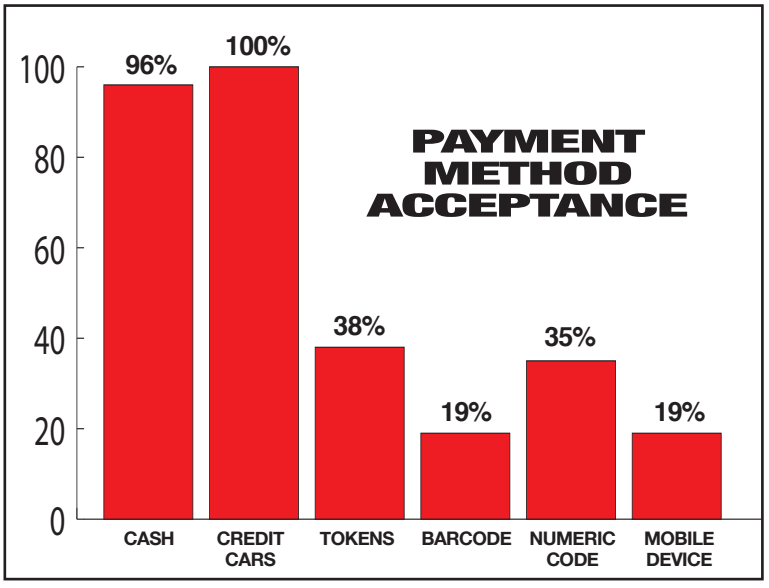
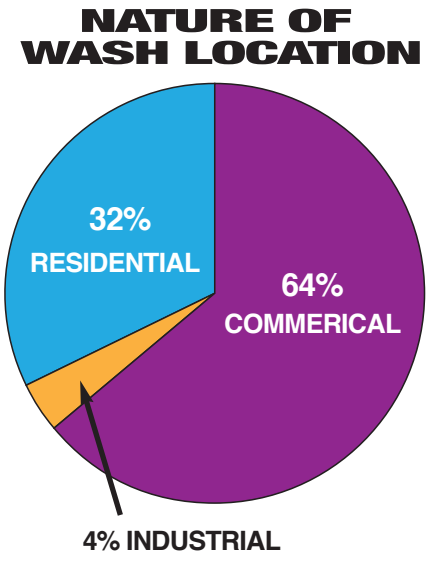
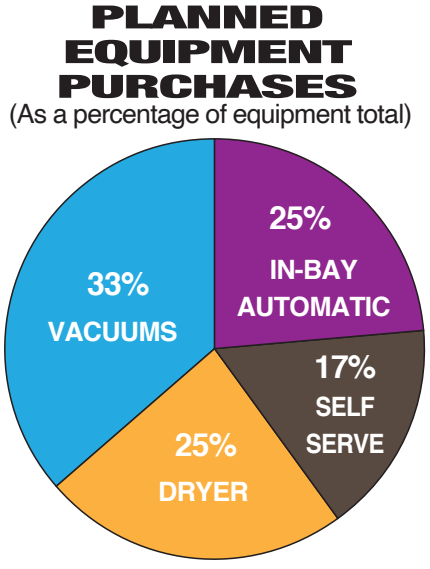
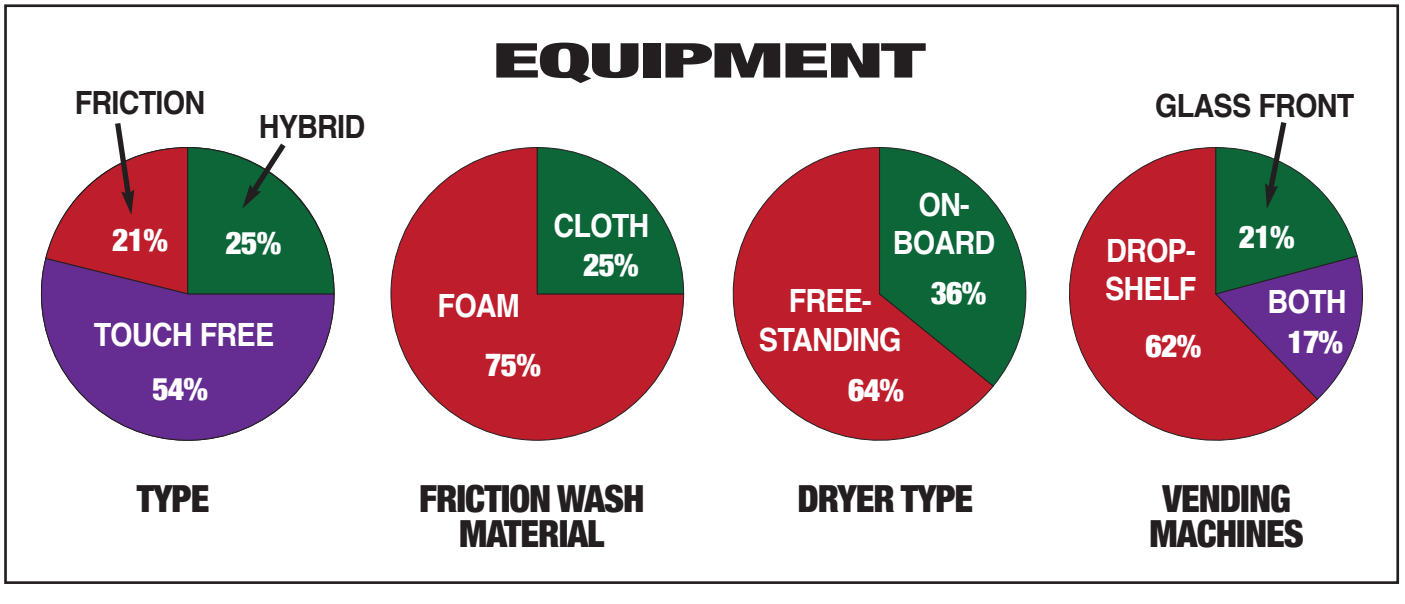



Table 2 Site Ownership	2023	2022	2021	2020
Own 1 Site	67%	67%	63%	67%
Own 2 sites	7%	7%	17%	17%
Own 3 sites	11%	7%	7%	5%
Own 4 or more sites	15%	20%	14%	11%