AutoLaundry news
THE VOICE OF THE CAR CARE INDUSTRY

Results from the Auto Laundry News

2024 Full/Flex Survey

www.carwashmag.com

SURVEY

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Auto Laundry News

2024 Full/Flex Survey

The 2024 *Auto Laundry News* Full/Flex Survey was conducted by mailing and emailing questionnaires to a random selection of subscribers who own and operate conveyor car wash businesses besides 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 comparison purposes, survey responses from full-service sites are, on occasion, tabulated separately from flex-service responses. Respondents self-identify to either the full-service or flex-service category. Full-service participants comprise 72 percent of the total, with flex-service sites accounting for 28 percent. This compares to a 75/25 split in 2022 and a 79/21 split in 2021.

Revenues

Across categories, 34 percent of respondents claimed an increase in revenue compared to last year. This represents a slight decrease from the 38 percent who reported the same last year and a massive drop from the 67 percent who enjoyed year-over-year growth two years ago. The graphic on page 35 provides a six-year perspective.

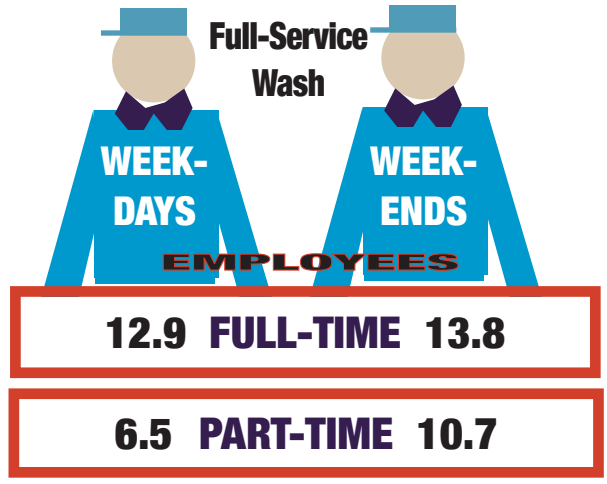
More full-service sites (36 percent) reported increases compared to their flex-serve counterparts (29 percent). While more full serves enjoyed increased cash flow, the average increase across the two formats was negligible — 8.3 percent for full serves and 8.0 percent for flex serves.

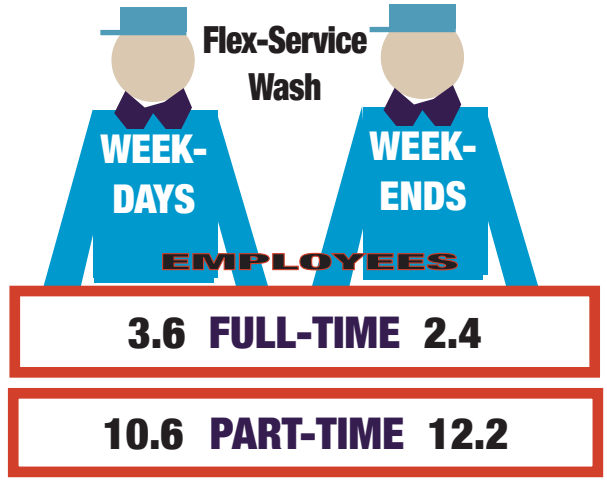
Among the sites that suffered through a decrease in revenue over the past year, flex serves lead the way with 57 percent reporting a decrease compared to the 44 percent of full serves that report the same. On average declining full serves saw an 11 percent drop in revenue compared to flex serve's average 10 percent decrease.

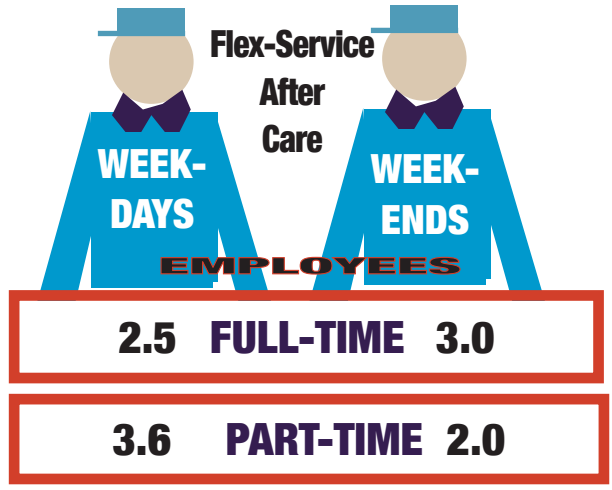
Inflation

While inflation has leveled off, its effects are still felt throughout the car wash industry. Sixty-seven percent of full-service operators report increasing their prices over the past year due to inflation, with an average increase of 7.5 percent. Flex-serve sites have also increased prices but slightly less frequently and at a lower rate. Fifty-six percent of flexes report raising prices due to inflation, with an average increase of 6.4 percent.

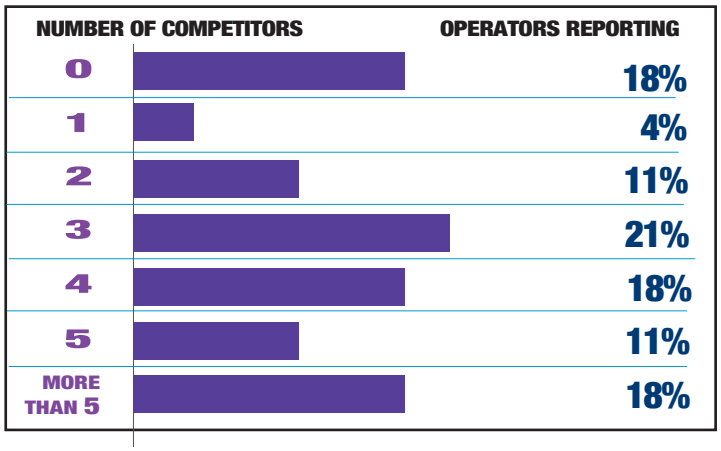
In addition, logistics issues continue to be a thorn in operators' sides, as 56 percent report being negatively affected by supply chain disruptions over the past year. This is an improvement from last year's results when 75 percent reported being adversely affected.







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	13	12	11	12	18	19	18
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	*	*	*	*	*	*	*
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	20	10	10	10	20	20	10
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	10	10	10	30	20	30
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	5	5	5	5	20	30	30
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	7	13	13	15	22	18	12
Mid-Atlantic New Jersey-New York-Pennsylvania	11	11	11	14	18	22	15
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

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	15	28	35	23
Mountain	*	*	*	*
Midwest	53	20	15	13
Central	40	20	15	25
South Central	15	40	25	20
Southeast	24	29	27	20
Mid-Atlantic	30	29	22	19
New England	*	*	*	*

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

OPEN SUNDAY

Full Service	Flex Service
78%	89%

OPEN 24 HOURS

Full Service	Flex Service
4%	22%

	AVERAGE DAILY TRAFFIC	AVERAGE ANNUAL WASH
Full Service	28,233	66,917
Flex Service	36,666	49,875

AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

EXTRA SERVICES OFFERED

		Average Price	% Of Operators Offering Services
INTERIOR SANITIZING	FULL	$84.99	63%
	FLEX	*	20%
DETAIL	FULL	$217.77	100%
	FLEX	$254.65	80%
UPHOLSTERY CLEANING	FULL	$109.99	81%
	FLEX	$54.98	80%
QUICK LUBE	FULL	$75.00	19%
	FLEX	$39.48	60%
CARPET SHAMPOO	FULL	$87.49	75%
	FLEX	$71.65	80%
EXTERIOR VINYL PROTECTANT	FULL	$36.66	44%
	FLEX	$20.00	40%
INTERIOR VINYL PROTECTANT	FULL	$45.00	38%
	FLEX	$9.33	80%
WAX AND HAND BUFF	FULL	$134.99	75%
	FLEX	$62.00	60%
WAX AND MACHINE BUFF	FULL	$149.99	63%
	FLEX	$89.00	40%

*Too few responses

EXTRA ON-LINE SERVICES SOLD

10% TO 20% OF CARS WASHED

2019	22%
2020	38%
2021	31%
2022	22%
2023	31%

21% TO 30% OF CARS WASHED

2019	4%
2020	6%
2021	23%
2022	0%
2023	0%

31% TO 40% OF CARS WASHED

2019	17%
2020	25%
2021	15%
2022	31%
2023	26%

41% TO 50% OF CARS WASHED

2019	22%
2020	6%
2021	8%
2022	8%
2023	13%

51% TO 60% OF CARS WASHED

2019	22%
2020	6%
2021	0%
2022	8%
2023	13%

OVER 60% OF CARS WASHED

2019	13%
2020	19%
2021	23%
2022	31%
2023	17%

SURVEY

OPERATE FREESTANDING AFTER-CARE CENTER

FULL SERVICE	FLEX SERVICE
33%	66%

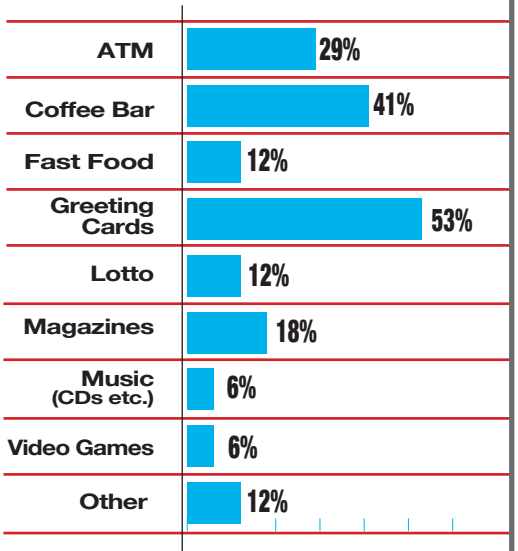
OPERATE COIN-OP BAYS ON SITE

FULL SERVICE	FLEX SERVICE
26%	44%

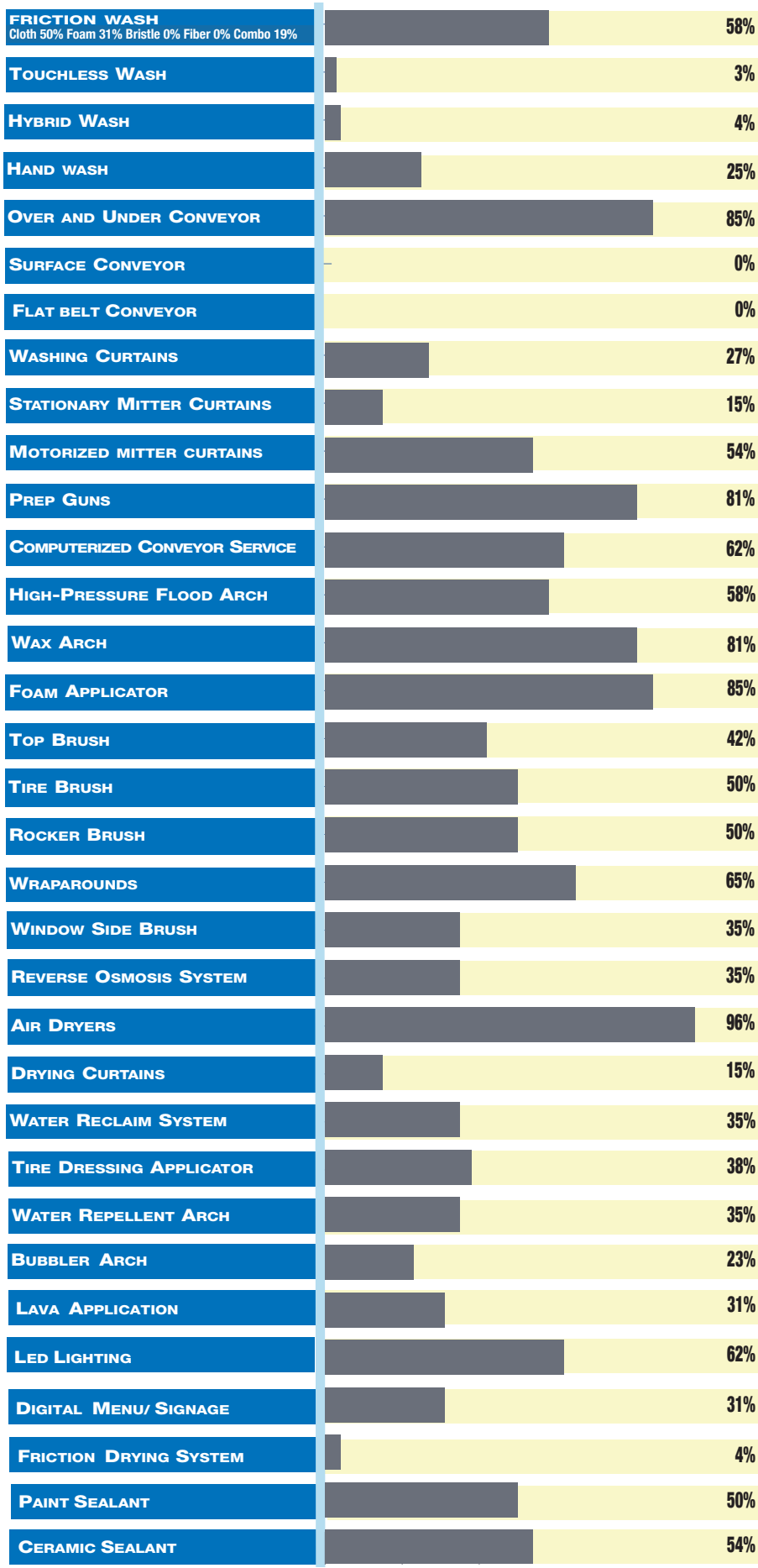
AVERAGE NUMBER OF BAYS

4	6

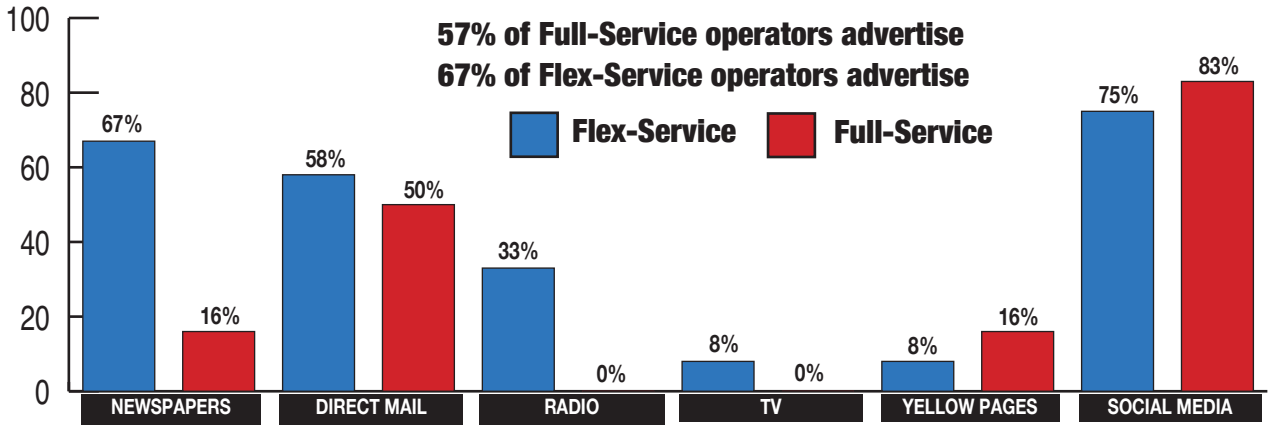
NON-AUTO PROFIT CENTERS ON SITE

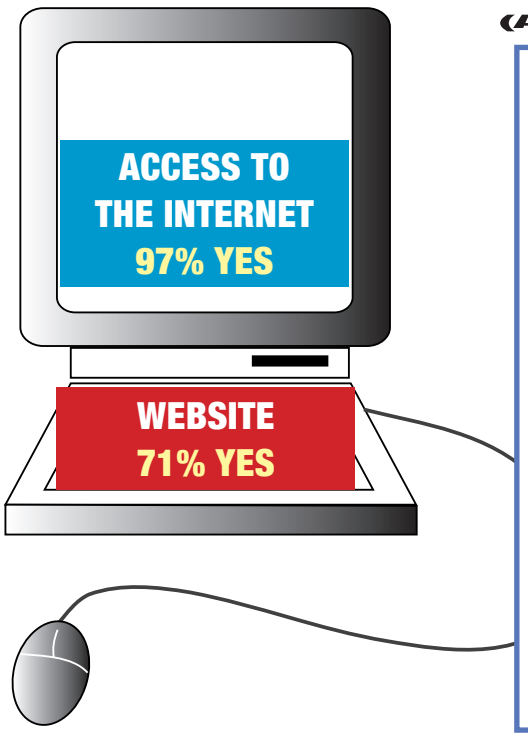


PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

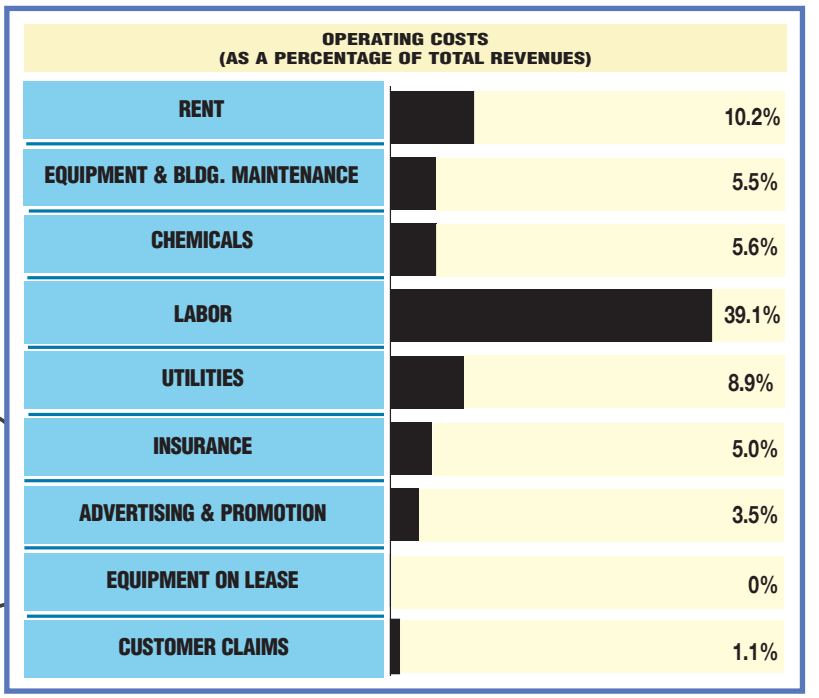


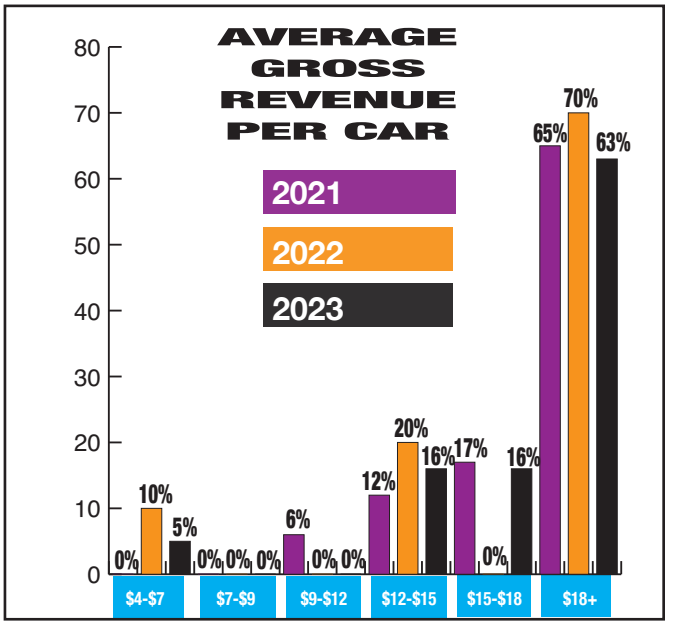
ADVERTISING & PROMOTION

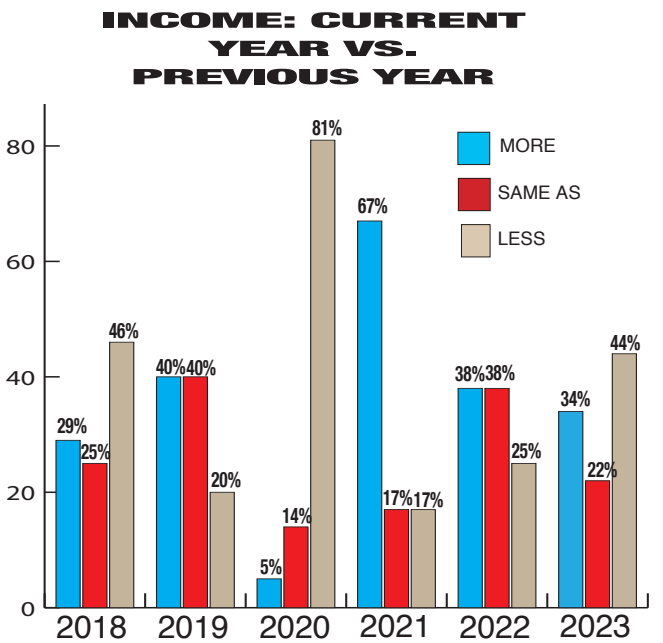




OPERATING COSTS
(AS A PERCENTAGE OF TOTAL REVENUES)

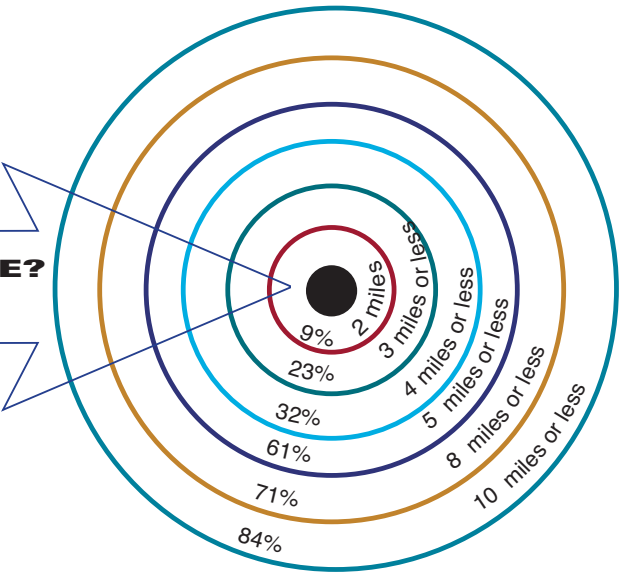


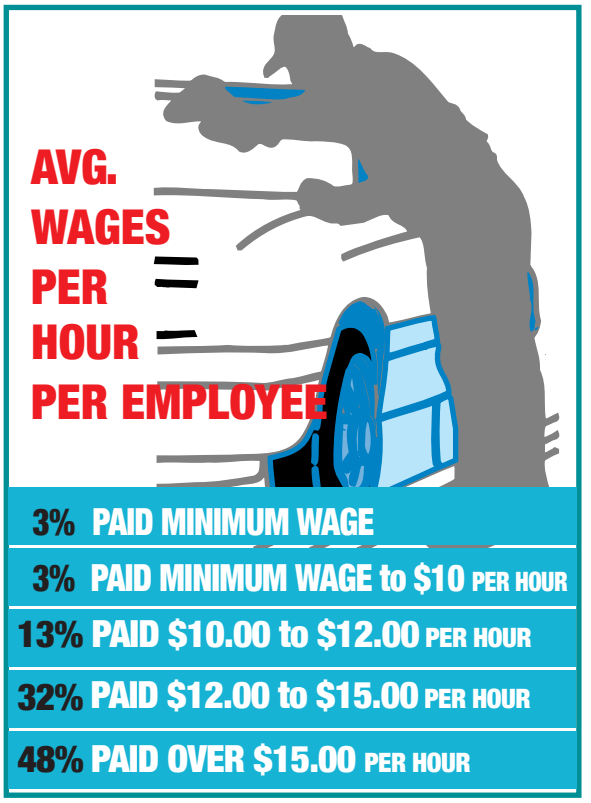




SURVEY

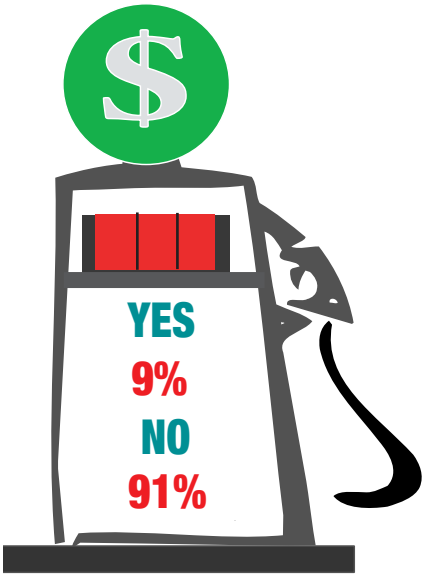
HOW FAR DO CUSTOMERS COME?
(% from within 2-mile radius, 3-mile radius, etc.)

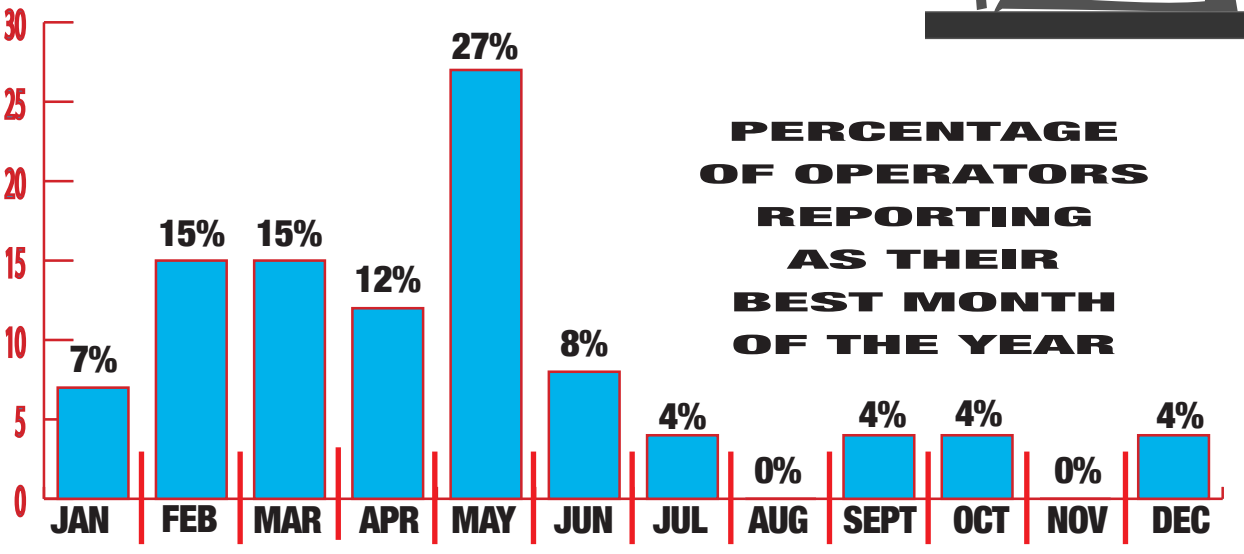




- 3% PAID MINIMUM WAGE
- 3% PAID MINIMUM WAGE to $10 PER HOUR
- 13% PAID $10.00 to $12.00 PER HOUR
- 32% PAID $12.00 to $15.00 PER HOUR
- 48% PAID OVER $15.00 PER HOUR

OPERATORS SELLING GASOLINE





PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR