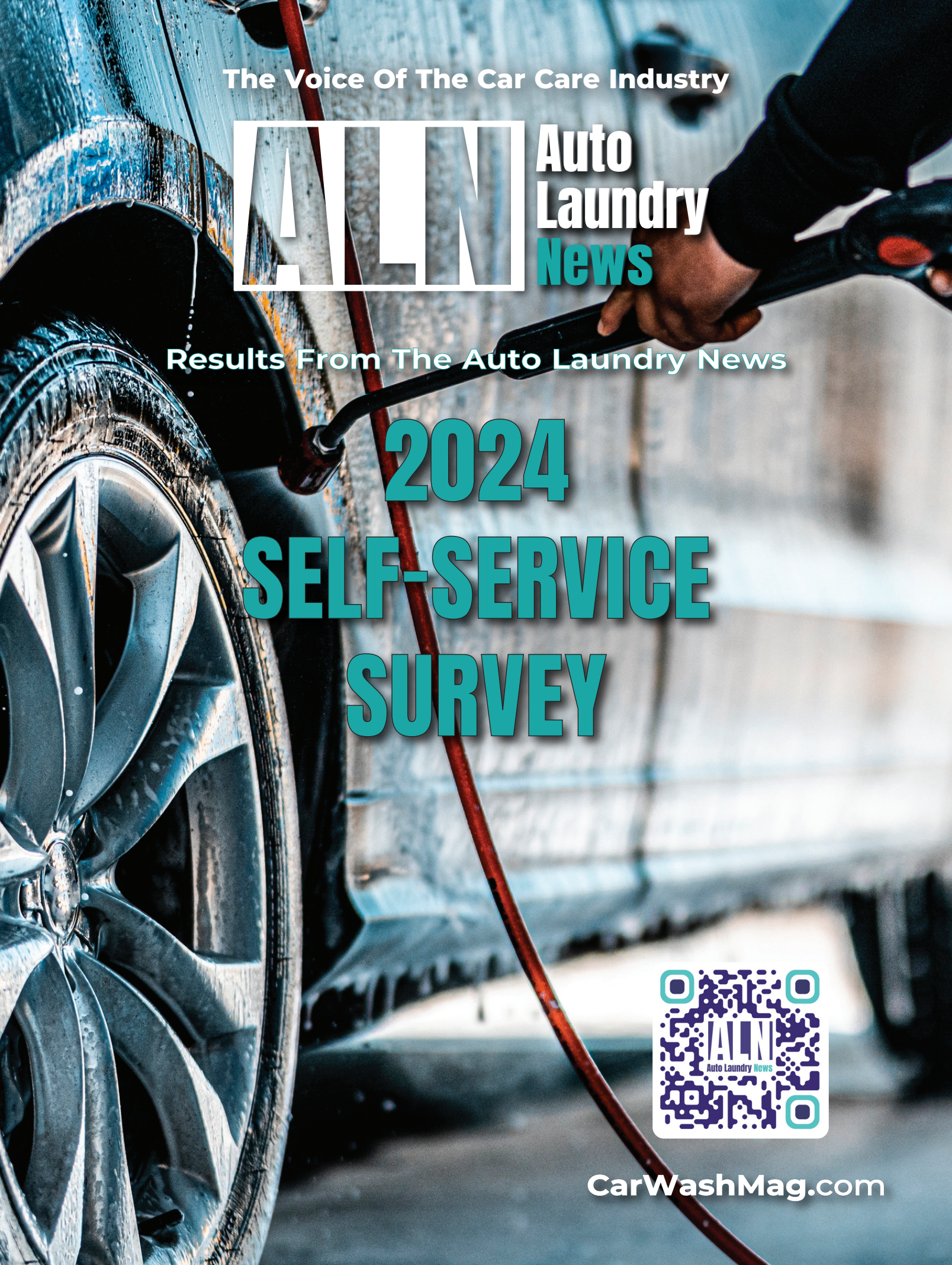


The Voice Of The Car Care Industry

ALN Auto Laundry News

Results From The Auto Laundry News

2024 SELF-SERVICE SURVEY

CarWashMag.com

Results From The Auto Laundry News

2024 SELF-SERVICE SURVEY

The 2024 *Auto Laundry News* Self-Service Survey was conducted through the print and electronic 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.

Participating locations with in-bay automatics make up 40 percent of the total response; those without account for 60 percent. In last year's survey, the split was 51/49.

Revenues

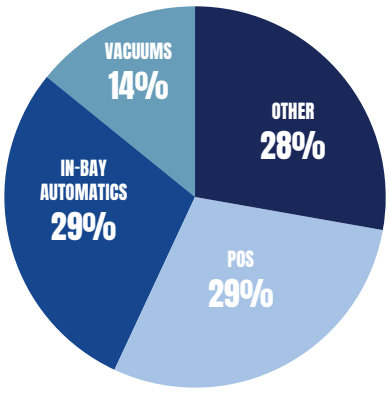
Overall, 58 percent of respondents report increased income compared to the previous year — a notable bump from the 34 percent who reported an increase last year. This is the first time since 2017 that 50 percent or more of respondents reported an increase in revenue.

This year, 10 percent of those surveyed report a decrease in year-over-year income, an improvement over the 32 percent that reported a decrease in last year's survey. The comparatively minuscule 10 percent that endured a decrease in revenue over the past year is the lowest percentage of operators reporting a reduction in revenue in more than a decade.

The encouraging economic results are even more impressive when you consider that inflation has stabilized. Just 37 percent of self-serve operators report increasing prices due to inflation over the past year — 65 percent did so last year. In addition, those who did increase prices did so at 10.8 percent on average, down from the 15.7 percent average increase reported in last year's survey.

NEW EQUIPMENT

33% of operators plan to add equipment in the next 12 months



Equipment

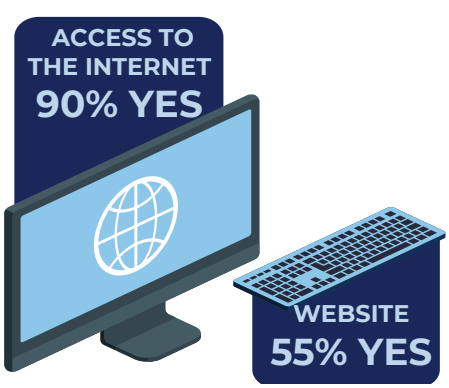
Overall, 33 percent of respondents plan to purchase new equipment during the 12 months ahead, compared to 27 percent who had such plans last year. This year, the most popular additions to the equipment array for those planning equipment purchases are in-bay automatics and ungraded POS units, both accounting for around a third of investment plans.

Interestingly, no survey respondents plan to invest in LED lighting this year — 11 percent reported a planned LED lighting purchase last year. Eighty-four percent of survey respondents have LED lighting installed at their wash, up from 76 percent last year.

State of the Segment

Survey participants were asked to provide one word that best describes the current state of the self-serve segment, and the responses were as diverse as the industry's operators. While responses were varied, they were overwhelmingly positive. Positive statements like 'excellent,' 'vibrant,' and 'growing,' outnumbered negative responses like 'dissolving,' 'troubled,' and 'outdated' three to one.

Moreover, the term 'good' and its synonyms were given nine times more frequently than 'bad' and its synonyms. Overall, self-serve operators are pleased with the segment and are bullish on its future.



Respondents Operating an In-Bay Automatic on Their Coin-OP Location

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	*	*	*	*
Mountain	*	*	*	*
Midwest	36	23	21	20
Central	43	20	15	22
South Central	23	33	22	22
Southeast	38	32	18	22
Mid-Atlantic	35	25	15	15
New England	*	*	*	*

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

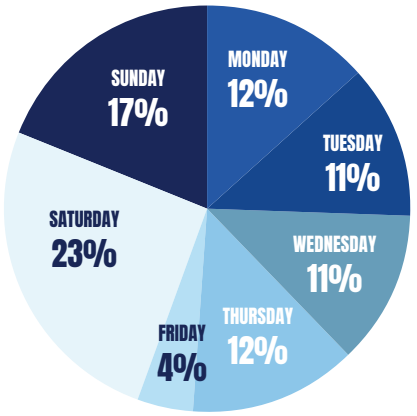
South Central
Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

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

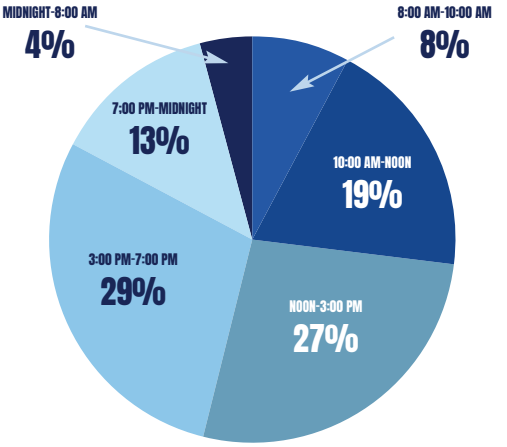
Mid-Atlantic
New Jersey-New York-Pennsylvania

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

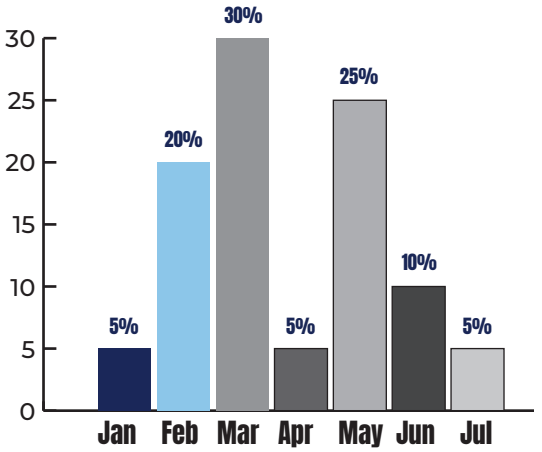
PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



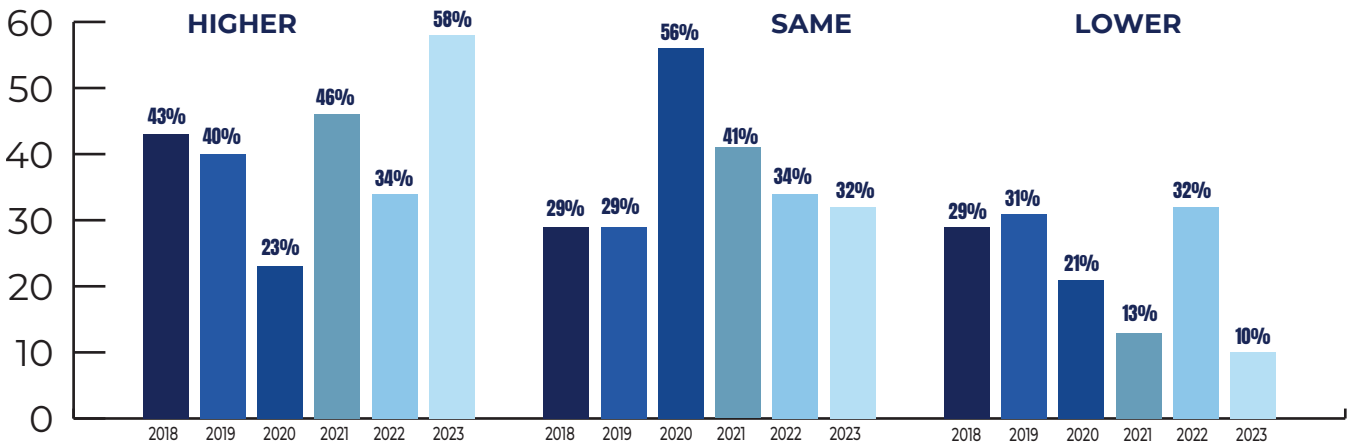
VOTED BEST MONTHS



ATTENDANT

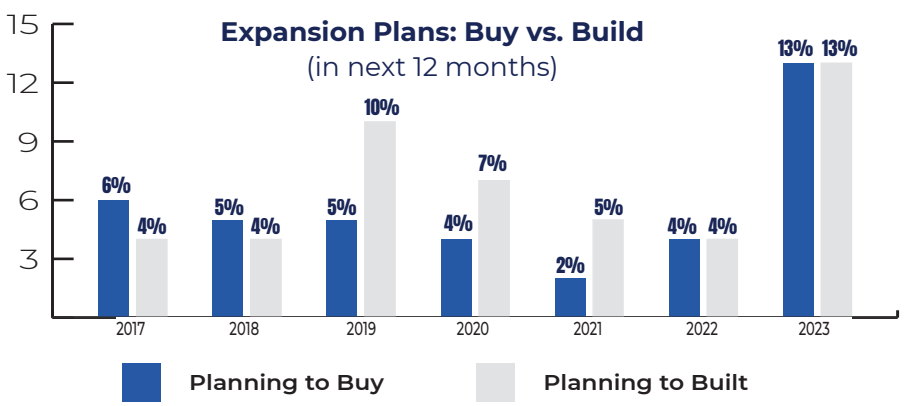
	2019	2020	2021	2022	2023
FULL-TIME	15%	13%	19%	19%	24%
PART-TIME	50%	42%	42%	51%	38%
NONE	35%	45%	39%	30%	38%

INCOME COMPARED TO PREVIOUS YEAR



EXPANSION PLANS

BUY VS. BUILD

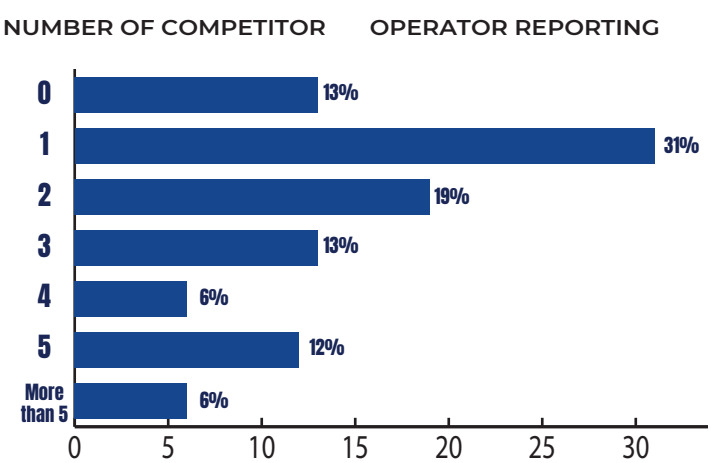


HOURS OF OPERATION

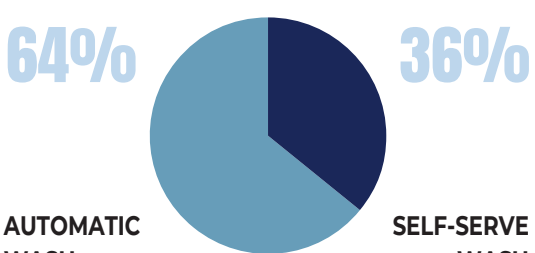
OPEN SUNDAYS
89%

OPEN 24 HOURS
78%

COMPETING SELF-SERVE IN AREA



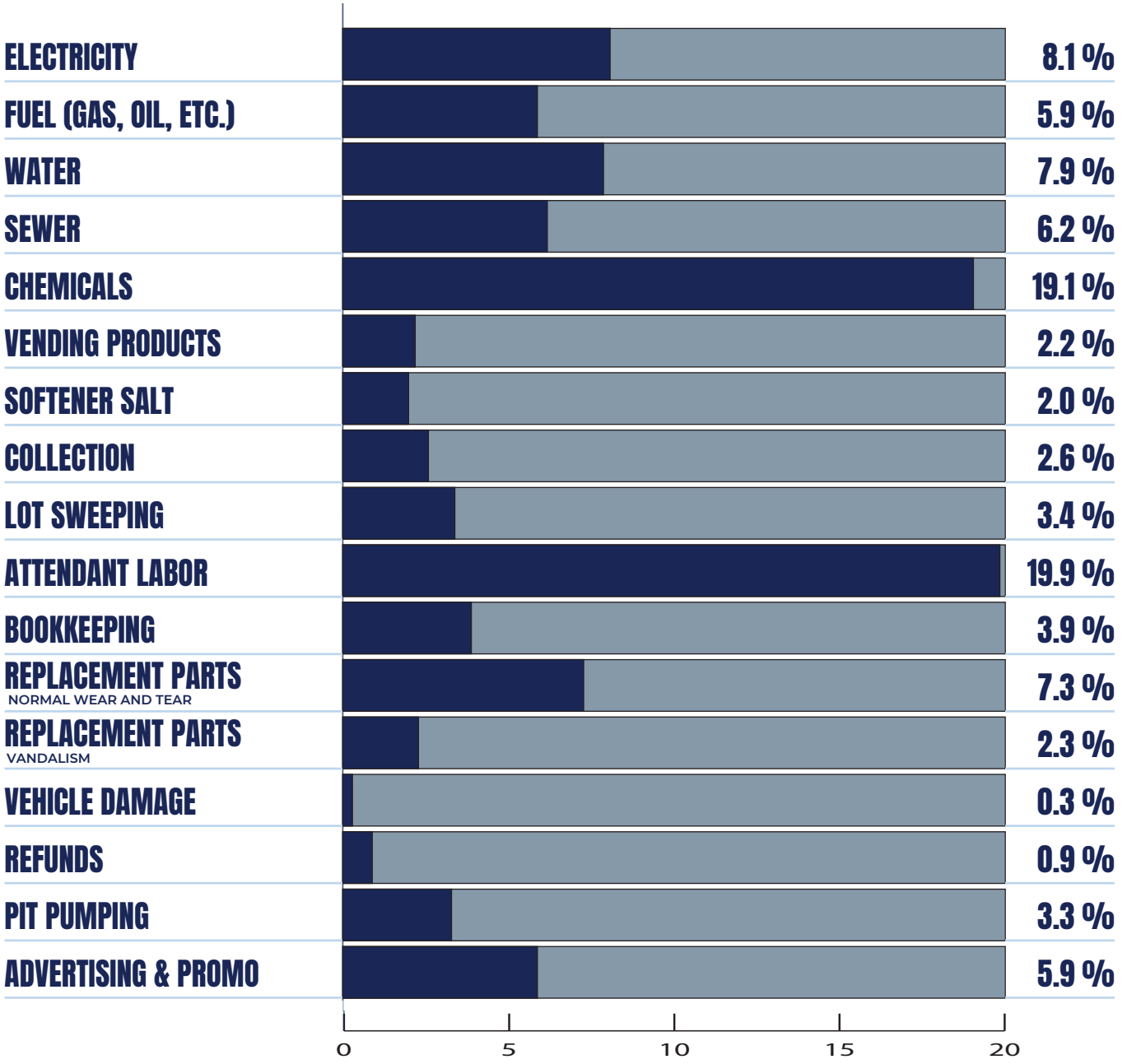
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/ SELF-SERVICE FACILITY



AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

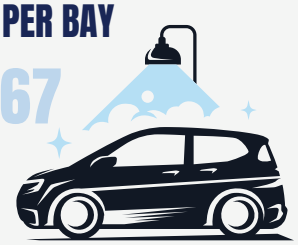
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

EXPENSES (OPERATING COSTS AS PERCENTAGE OF TOTAL MONTHLY REVENUES)



AVERAGE MONTHLY GROSS INCOME PER BAY

$1,967

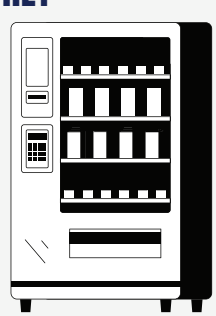


AVERAGE MONTHLY GROSS INCOME PER VACUUM

$383

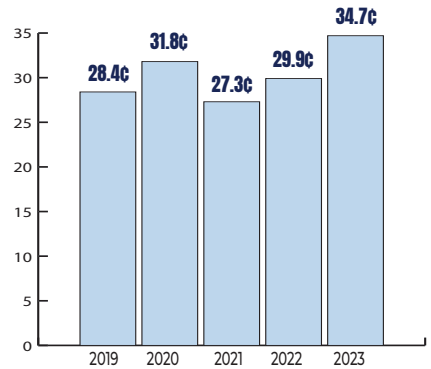
AVERAGE MONTHLY GROSS INCOME FOR VENDING

$286

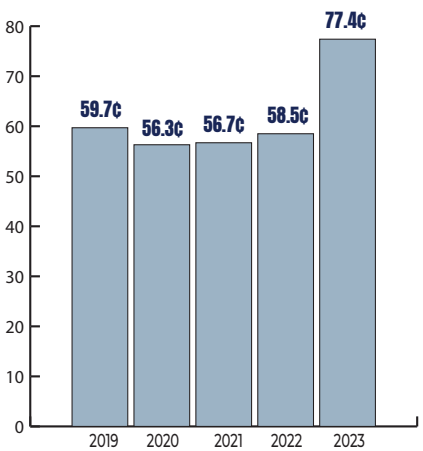


PRICE

VACUUMS
PRICE PER MINUTE



WASH BAYS
PRICE PER MINUTE

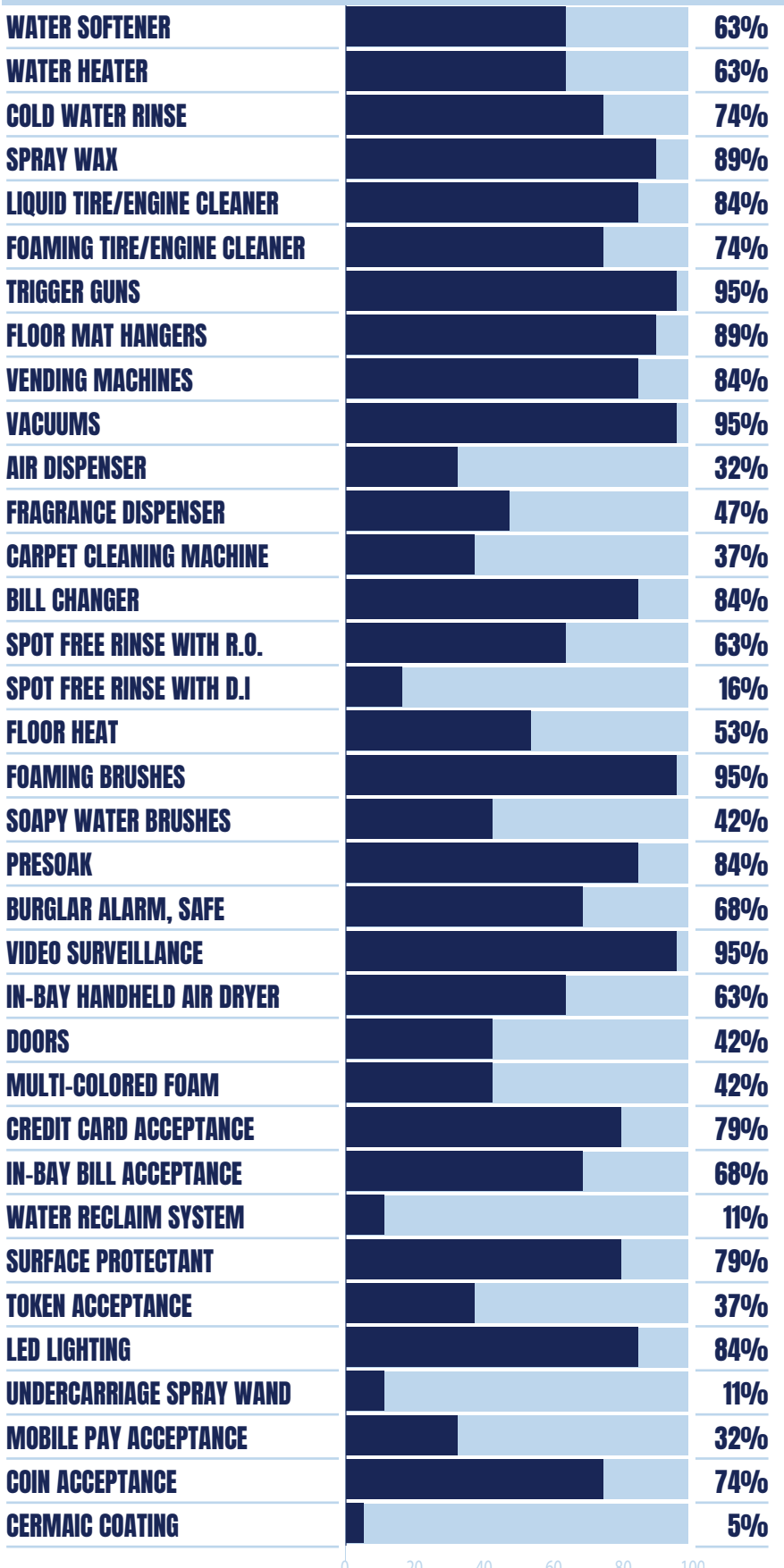


EXPRESS EXTERIOR NEARBY

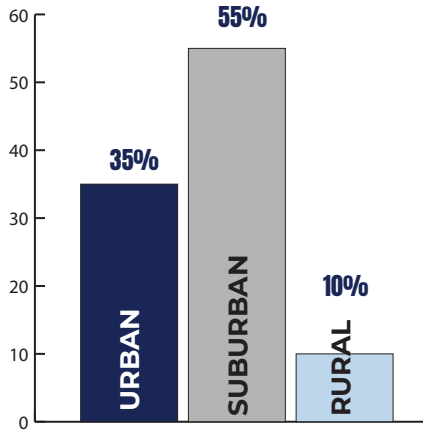
NO	33%
YES	67%

HAS HURT BUSINESS	HAS NOT HURT BUSINESS
8%	92%

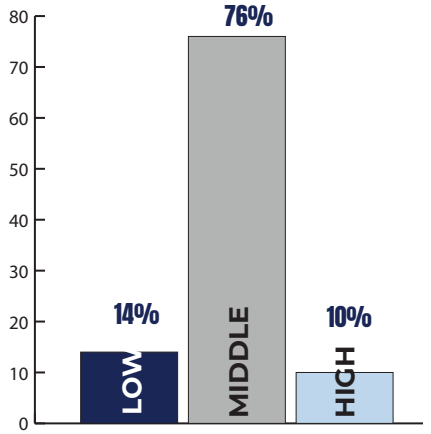
CURRENT EQUIPMENT



SITE LOCATION

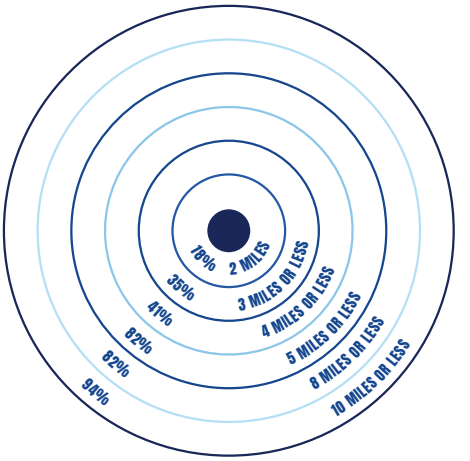


MARKET INCOME LEVEL

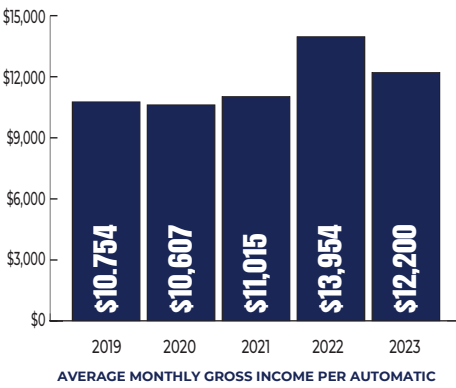


MARKET SIZE

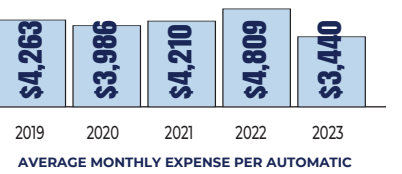
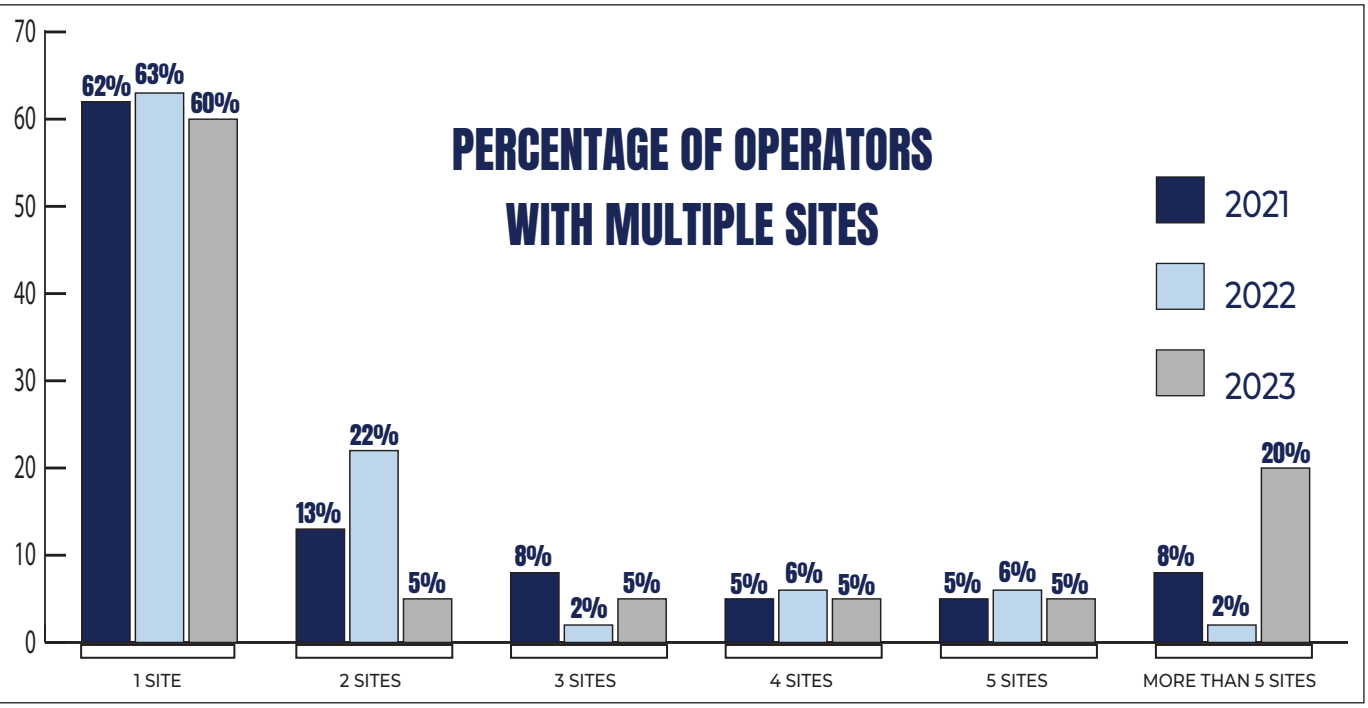
HOW FAR DO CUSTOMERS COME?



AUTOMATICS



AVERAGE MONTHLY GROSS INCOME AND EXPENSE



PERCENTAGE OF OPERATORS WITH MULTIPLE SITES