The Voice Of The Car Care Industry

Auto Laundry News

Results From The Auto Laundry News

2025 SELF-SERVICE SURVEY

CarWashMag.com

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The 2025 *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 52 percent of the total response; those without account for 48 percent. Last year, the split was 40/60.

REVENUES

In a significant drop off from last year's results, just 27 percent of respondents reported increased year-over-year revenue. Last year more than half (58 percent) of survey takers reported an increase in revenue, the first time in more than five years that most operators enjoyed an increase.

As the percentage of operators that enjoyed an increase shrunk this year, the number of self-serve car washers that saw revenue decrease year-over-year grew. This year, nearly 1 in 4 (23 percent) of survey respondents said their income dropped in 2024 compared to 2023, up from the 10 percent that reported the downward trend last year.

While operators reporting increases were significantly less, and those reporting decreases rose – respondents reporting no change in revenue reached a five-year high at 50 percent.

EQUIPMENT

While much of the industry has seen cash flow remain stagnant over the past year, it has not deterred them from reinvesting in their businesses. In fact, more than half of those surveyed (54 percent) report plans to purchase new equipment over the next 12 months. Last year, a third of operators had similar plans.

The most popular planned edition is self-serve dryers at 25 percent, followed by in-bay automatic equipment and POS units, both at 19 percent.

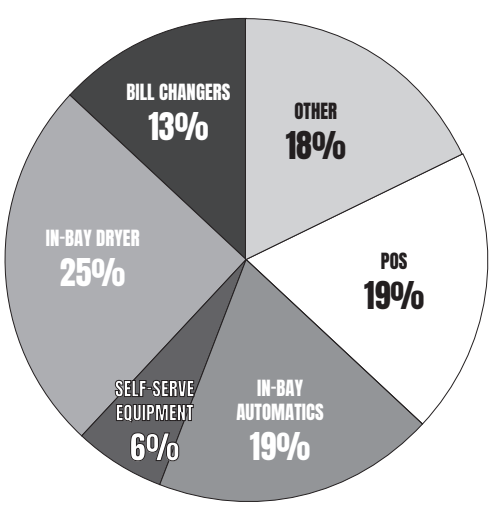
STATE OF THE SEGMENT

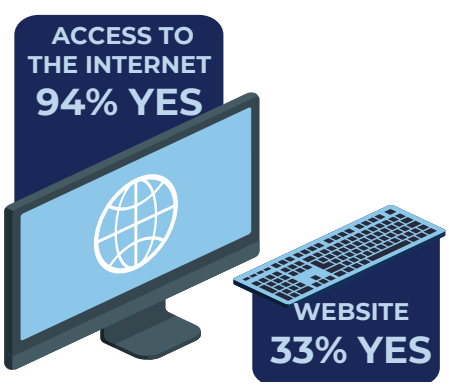
For the second consecutive year, survey participants were asked to provide one word that best describes the current state of the self-serve segment. Responses ran the gambit from 'Steady' and 'Satisfying' to 'Terrible' and 'Dying.' But overall, operators have a positive outlook on the segment, with 64 percent describing the self-serve market in favorable terms. Surprisingly, around 30 percent of respondents described the segment as simply 'Good,' which is positive, if unoriginal.

This year, we introduced a second open-ended question, asking operators for one word to describe the future state of the segment. Interestingly, operators are extremely bullish on the segment's future despite the challenges it faces. Seventy-two percent of responses were positive, describing the future state as 'Stronger' and 'Stable,' while just 19 percent described the potential future as 'Bleak' and 'Decreasing.'

NEW EQUIPMENT

54% of operators plan to add equipment in the next 12 months





Respondents Operating an In-Bay Automatic at Their Coin-Op Location

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	*	*	*	*
Mountain	19	27	27	27
Midwest	31	31	19	19
Central	45	25	15	15
South Central	20	28	26	26
Southeast	22	31	24	23
Mid-Atlantic	25	35	18	22
New England	25	20	35	20

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

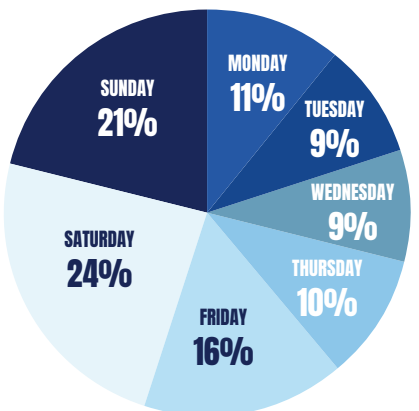
South Central
Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

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

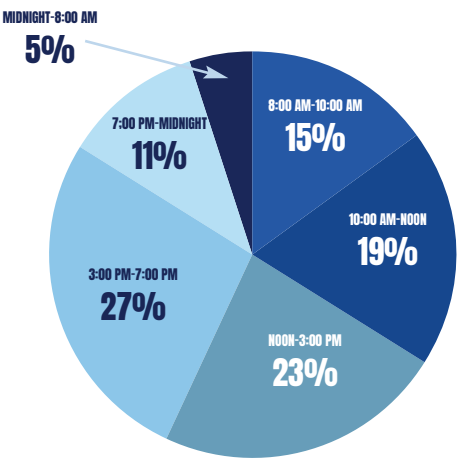
Mid-Atlantic
New Jersey-New York-Pennsylvania

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

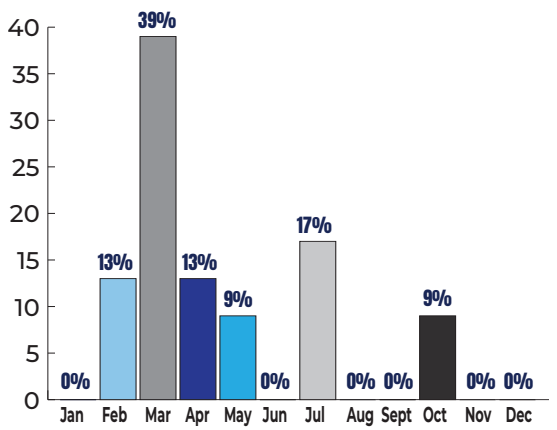
PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK



PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



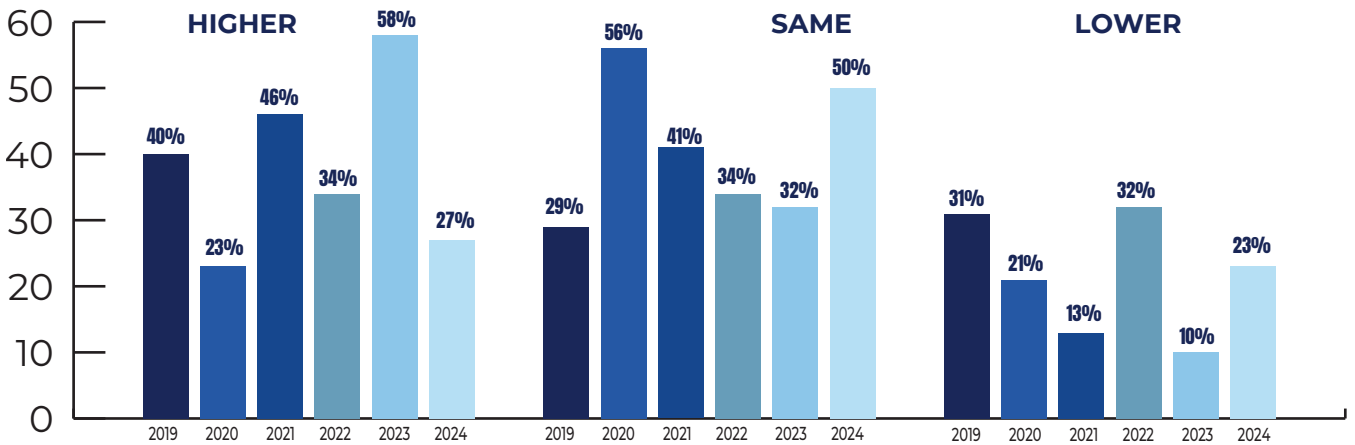
VOTED BEST MONTH



ATTENDANTS

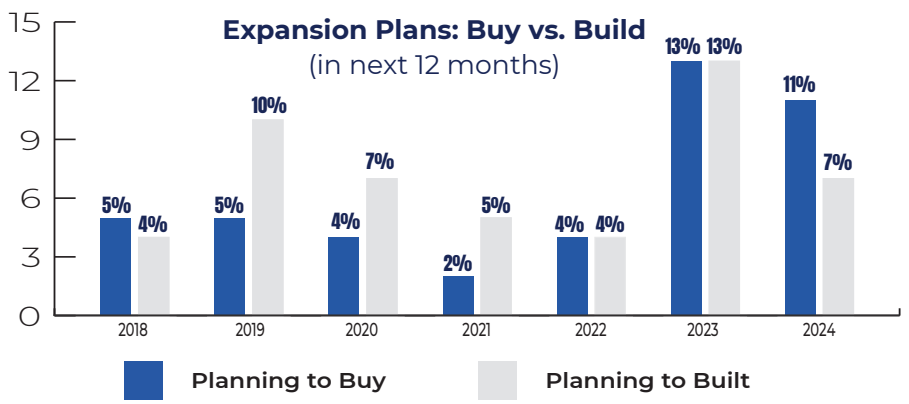
	2020	2021	2022	2023	2024
FULL-TIME	13%	19%	19%	24%	23%
PART-TIME	42%	42%	51%	38%	50%
NONE	45%	39%	30%	38%	27%

INCOME COMPARED TO PREVIOUS YEAR



EXPANSION PLANS

BUY VS. BUILD

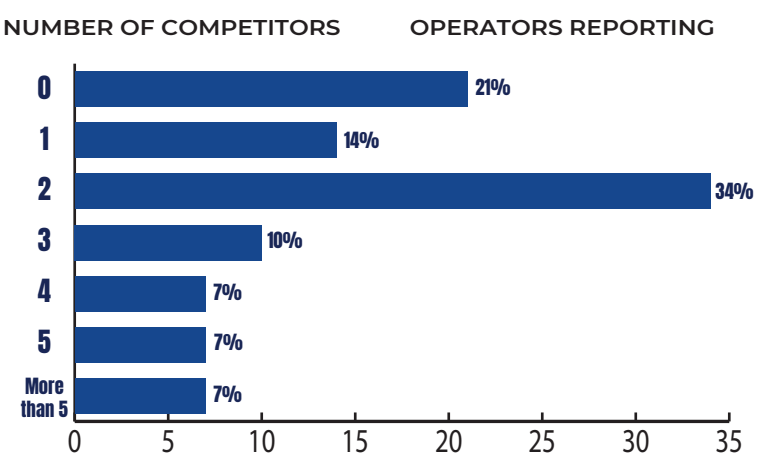


HOURS OF OPERATION

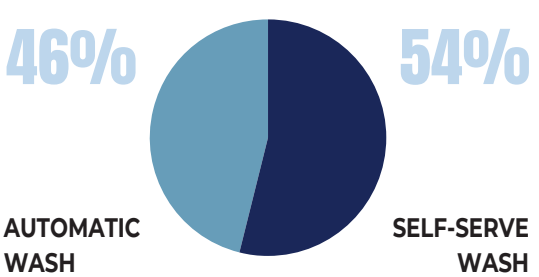
OPEN SUNDAYS
100%

OPEN 24 HOURS
96%

COMPETING SELF-SERVES IN AREA



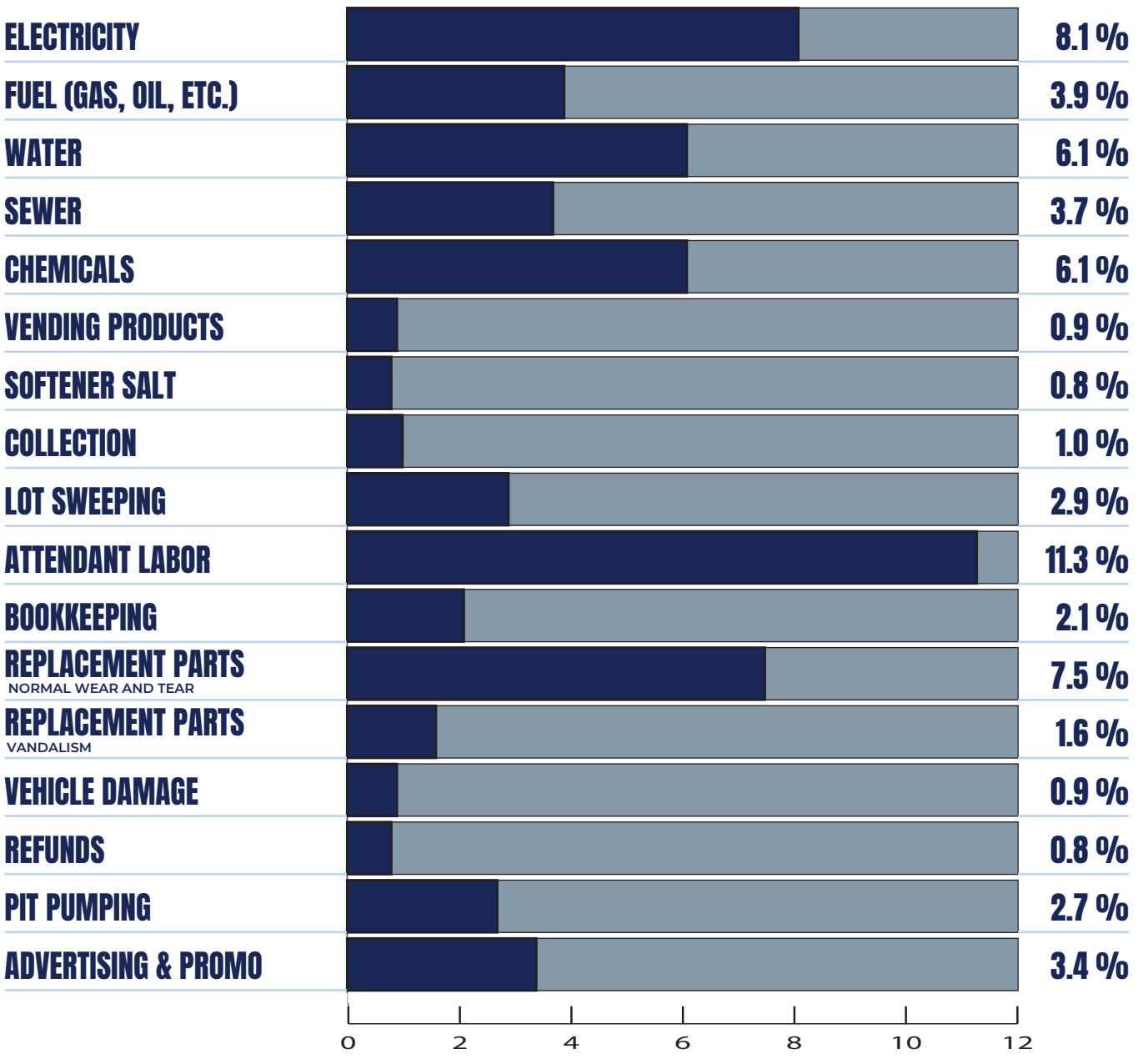
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/ SELF-SERVICE FACILITY



AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

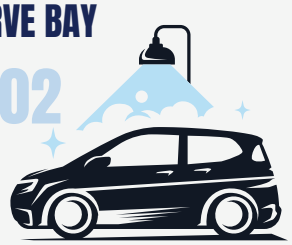
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

EXPENSES (OPERATING COSTS AS PERCENTAGE OF TOTAL MONTHLY REVENUES)



MONTHLY GROSS INCOME PER SELF SERVE BAY

$2,302

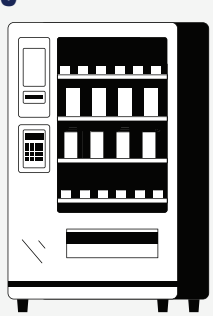


MONTHLY GROSS INCOME PER VACUUM

$533

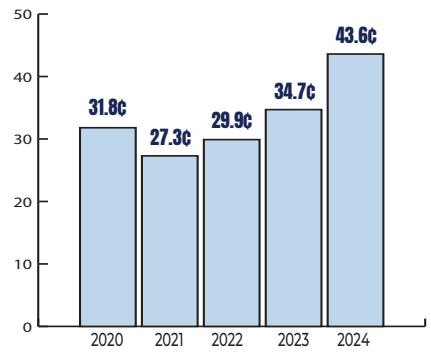
MONTHLY GROSS INCOME FOR VENDING

$365

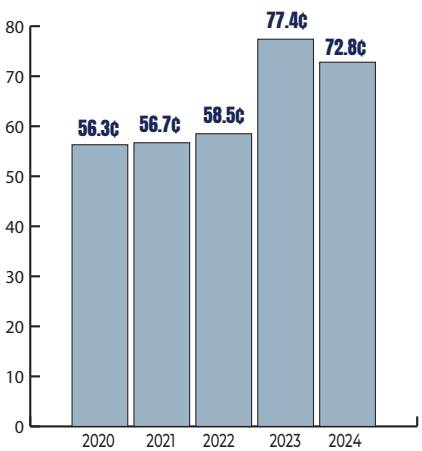


PRICE

VACUUMS
PRICE PER MINUTE



WASH BAYS
PRICE PER MINUTE

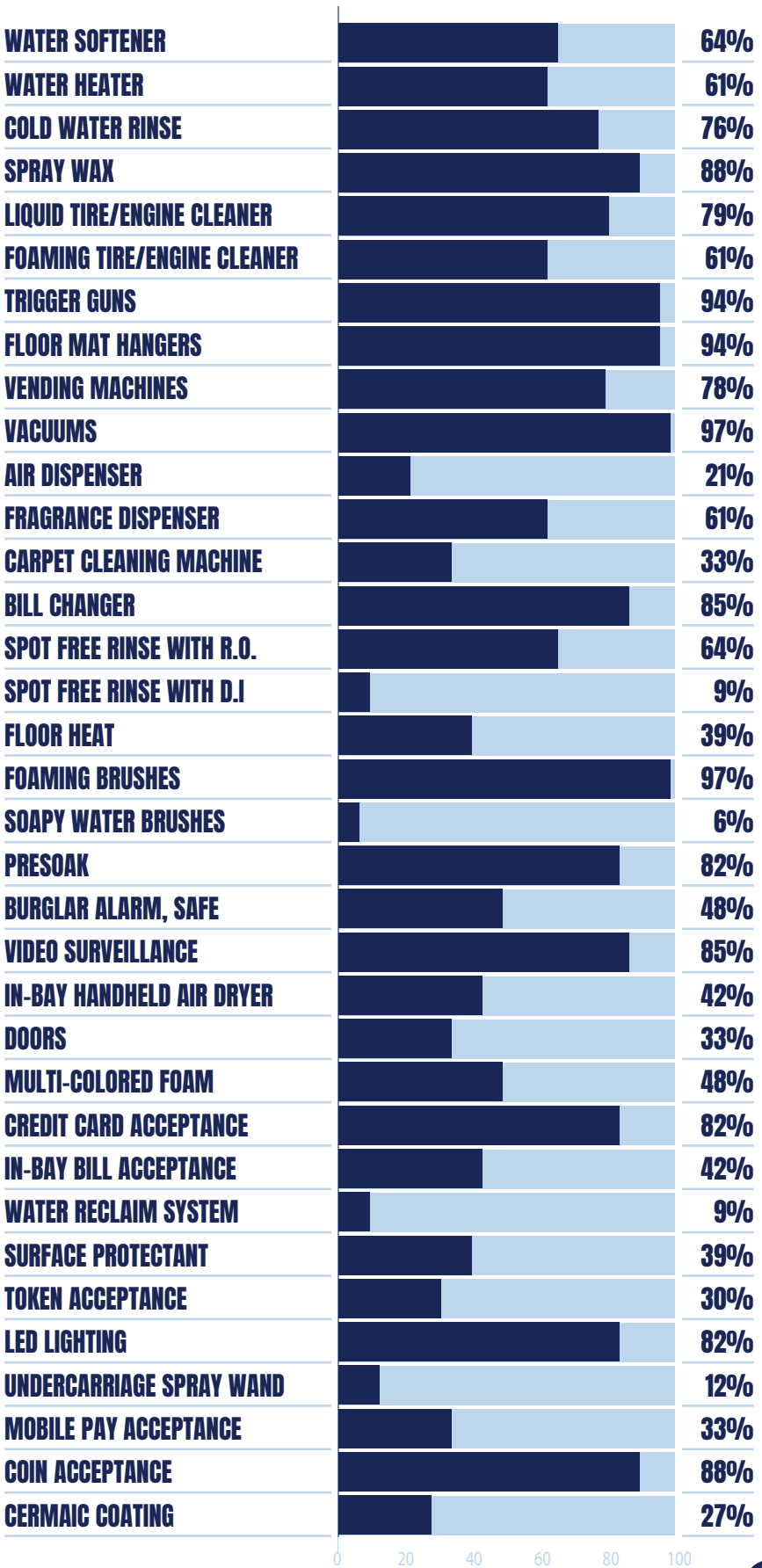


EXPRESS EXTERIOR NEARBY

NO	32%
YES	68%

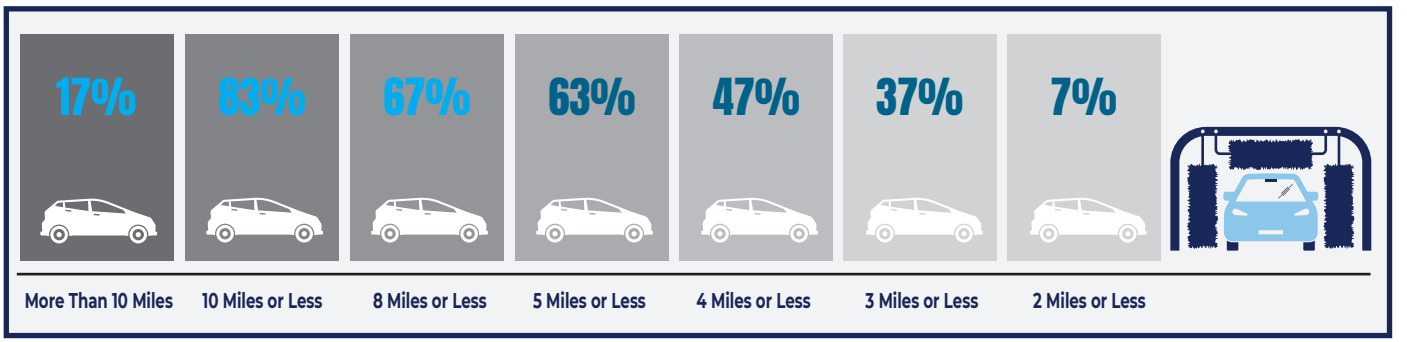
HAS HURT BUSINESS	HAS NOT HURT BUSINESS
58%	42%

CURRENT EQUIPMENT

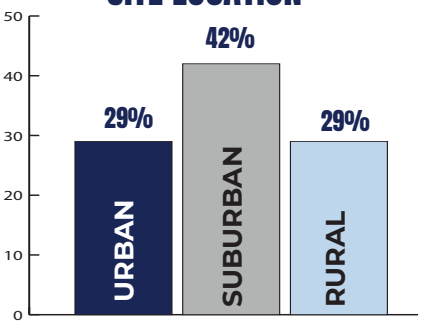


MARKET SIZE

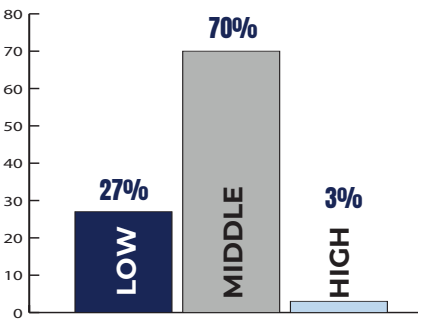
HOW FAR DO CUSTOMERS COME?



SITE LOCATION

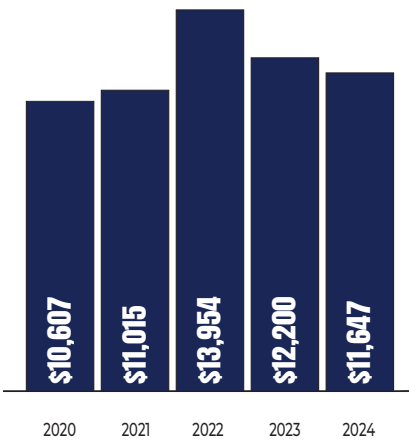


MARKET INCOME LEVEL

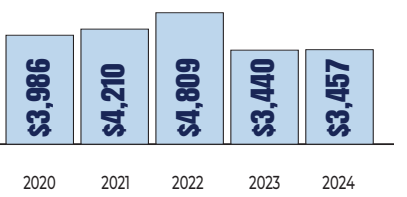
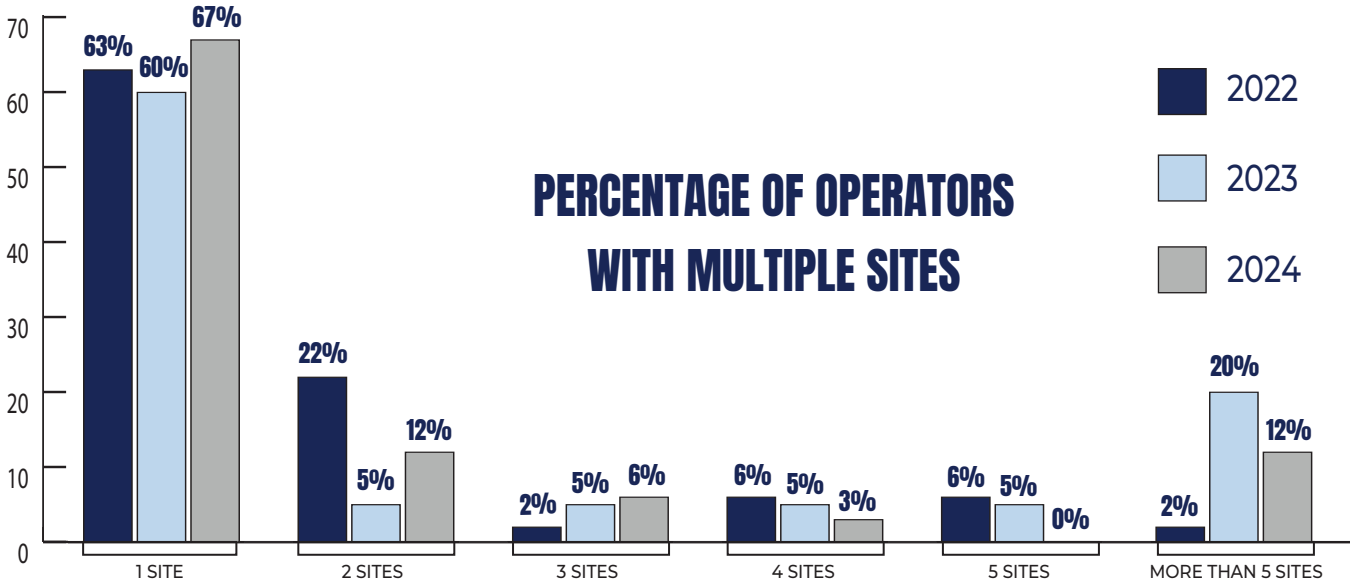


AUTOMATICS

MONTHLY GROSS INCOME PER AUTOMATIC



MONTHLY EXPENSE PER AUTOMATIC



PERCENTAGE OF OPERATORS WITH MULTIPLE SITES