

# AutoLaundry<sup>news</sup>

**SURVEY**

# Results From The Auto Laundry News 2013 Detail Survey

The 2013 *Auto Laundry News* Detailing Survey was conducted through a mailing of questionnaires to a random selection of subscribers who provide detailing services at their car care businesses. The information contained in this report results from an analysis of data provided by 124 respondents from across the United States.

**RESPONDENT POOL PROFILE**

For comparative purposes, respondents are, on occasion, separated into three main categories: freestanding detailing shops (Freestanding), detail shops run in conjunction with a car wash (Car Wash Combo), and mobile detail services (Mobile Services). A fourth category, detail shops run in conjunction with a business other than a car wash

(Other Combo), such as a gas station, fast lube, etc., is employed when relevant. The categories break down as follows:

Detailer Type	% of Total
Freestanding	50
Car Wash Combo	29
Mobile Services	15
Other Combo	6

**PERFORMANCE**

For the first time since 2007, a majority of survey respondents, overall, report improvement in their business over the previous year. This not only continues a positive trend begun with the 2011 survey, but also picks up the pace considerably. In the current survey, 53 percent of participants report income growth compared to one year ago, a notable improvement over the 40 percent who were able to do so in last year's survey. In the 2011 survey, 37 percent reported progress. For the third year running, Freestanding shops were the top performers with 60 percent recording increased revenue. Forty-four percent of Car Wash Combos reported advances, trailing the 56 percent of Mobile Services that were able to report the same.

**MARKET**

Overall, 43 percent of respondents report that most of their customers travel a 10-mile-plus distance for service, a figure that seems extraordinarily high. Understandably, customers of Car Wash Combos travel shorter distances than do customers of Freestanding shops — 80 percent of the former travel fewer than 10 miles, while 52 percent of the latter do so.

Car Wash Combos maintain the most-customer-friendly hours, with 61 percent of facilities open for businesses on Sundays. Only 6 percent of Freestanding shops are open on Sundays, and 29 percent have no business hours even on Saturdays.

PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON BY REGION				
	WINTER	SPRING	SUMMER	FALL
Pacific	21	20	39	20
Mountain	32	21	23	24
Midwest	16	28	29	27
Central	16	29	31	24
South Central	10	22	45	23
Southeast	15	29	32	24
Mid-Atlantic	19	21	36	24
New England	15	33	28	24

**KEY**

**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**

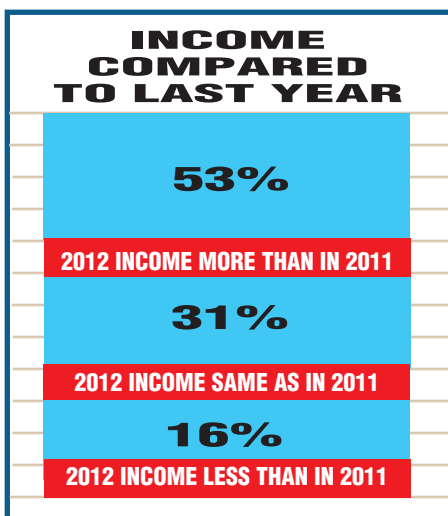
Delaware-Florida-Georgia-Maryland-Carolinas-Virginia-West Virginia

**Mid-Atlantic**

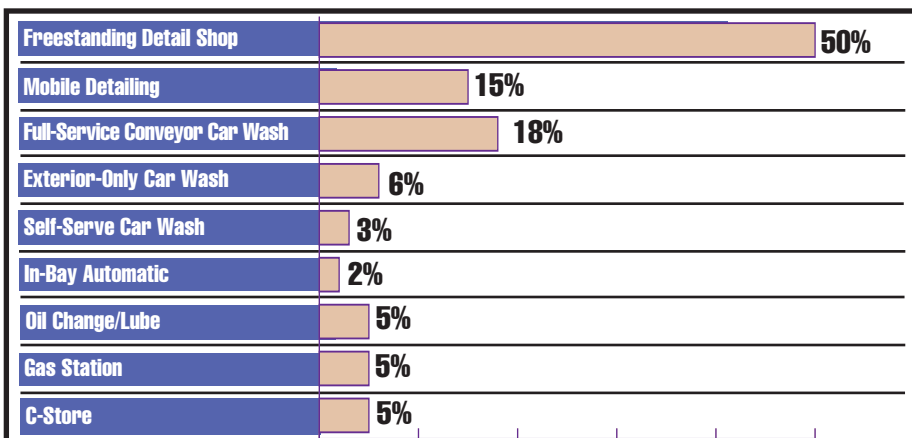
New Jersey-New York-Pennsylvania

**New England**

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

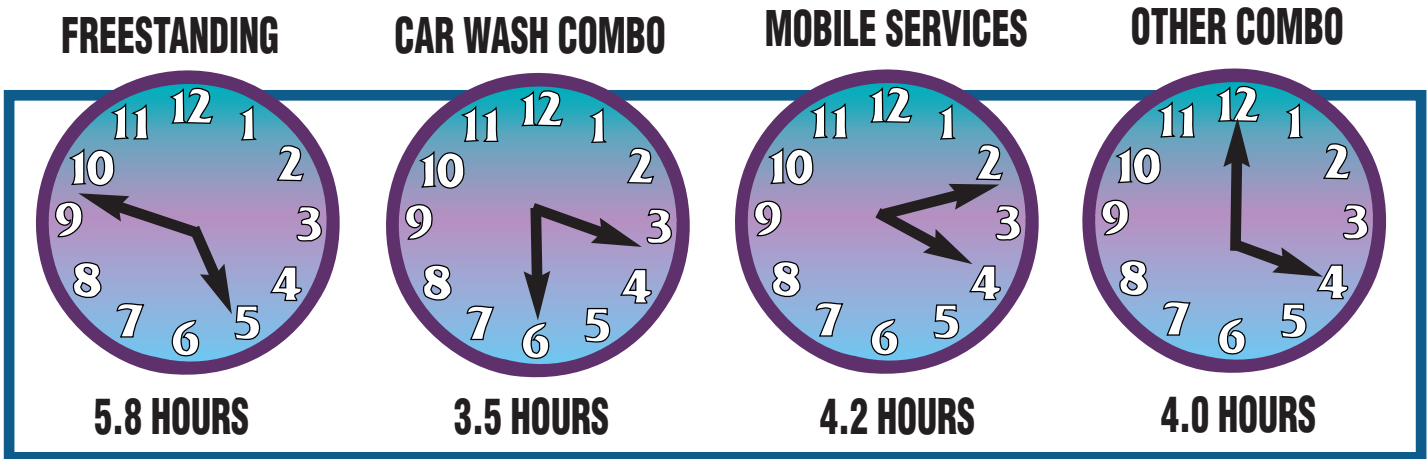


**OPERATOR PROFILE**

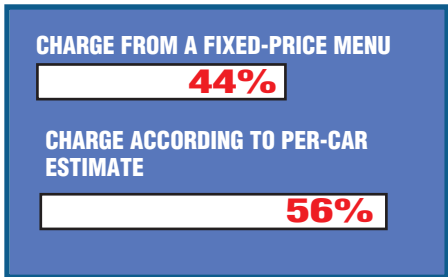


**SURVEY**

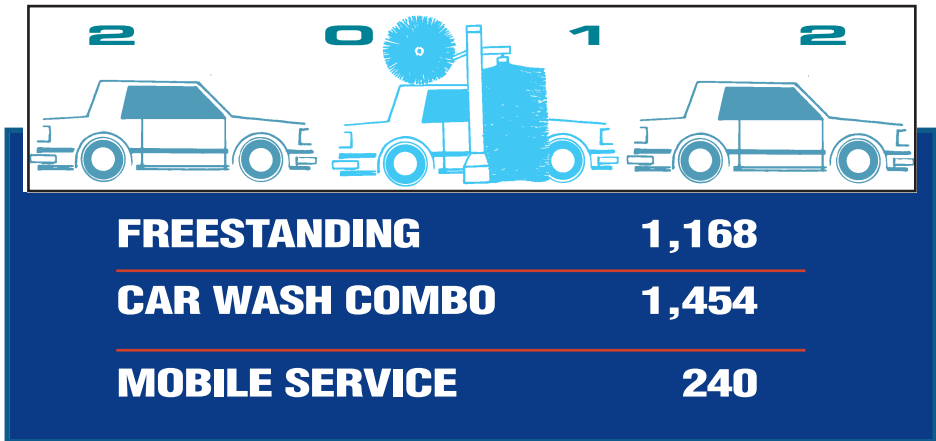
**AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE**



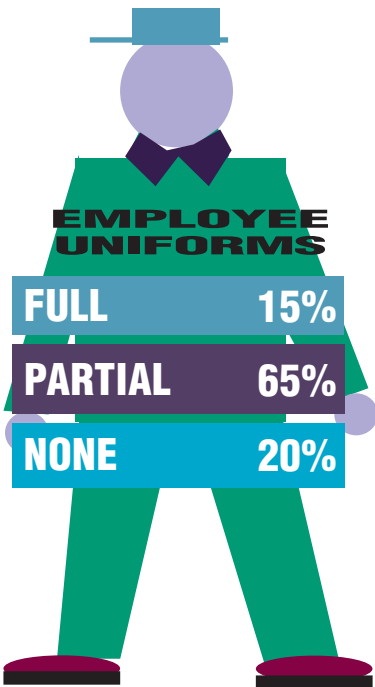
**DETAIL SERVICE PRICES**



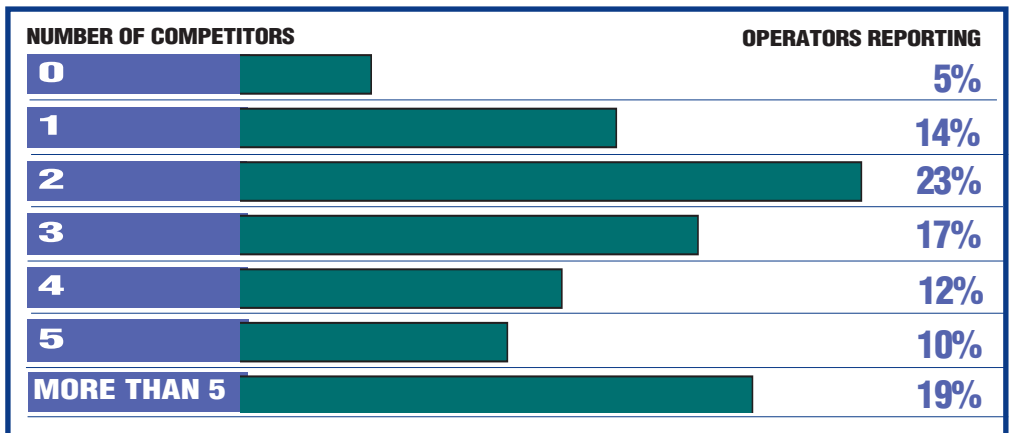
**AVERAGE NUMBER OF CARS DETAILED ANNUALLY**

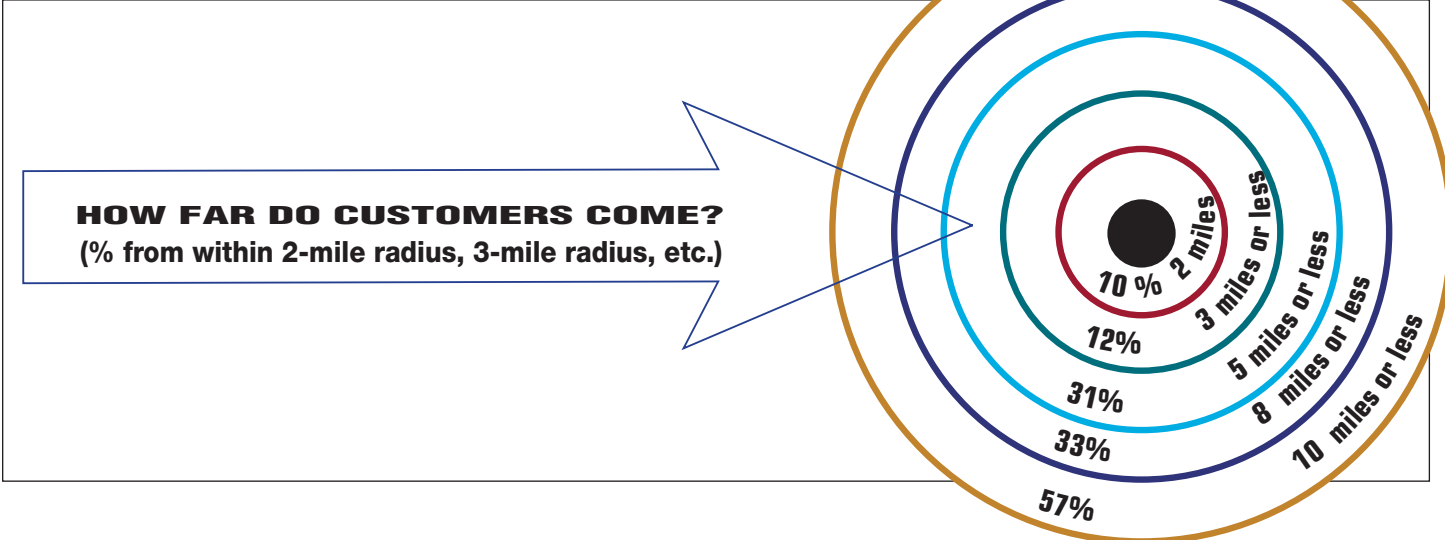


**EMPLOYEE UNIFORMS**



**COMPETING DETAIL SHOPS IN AREA**





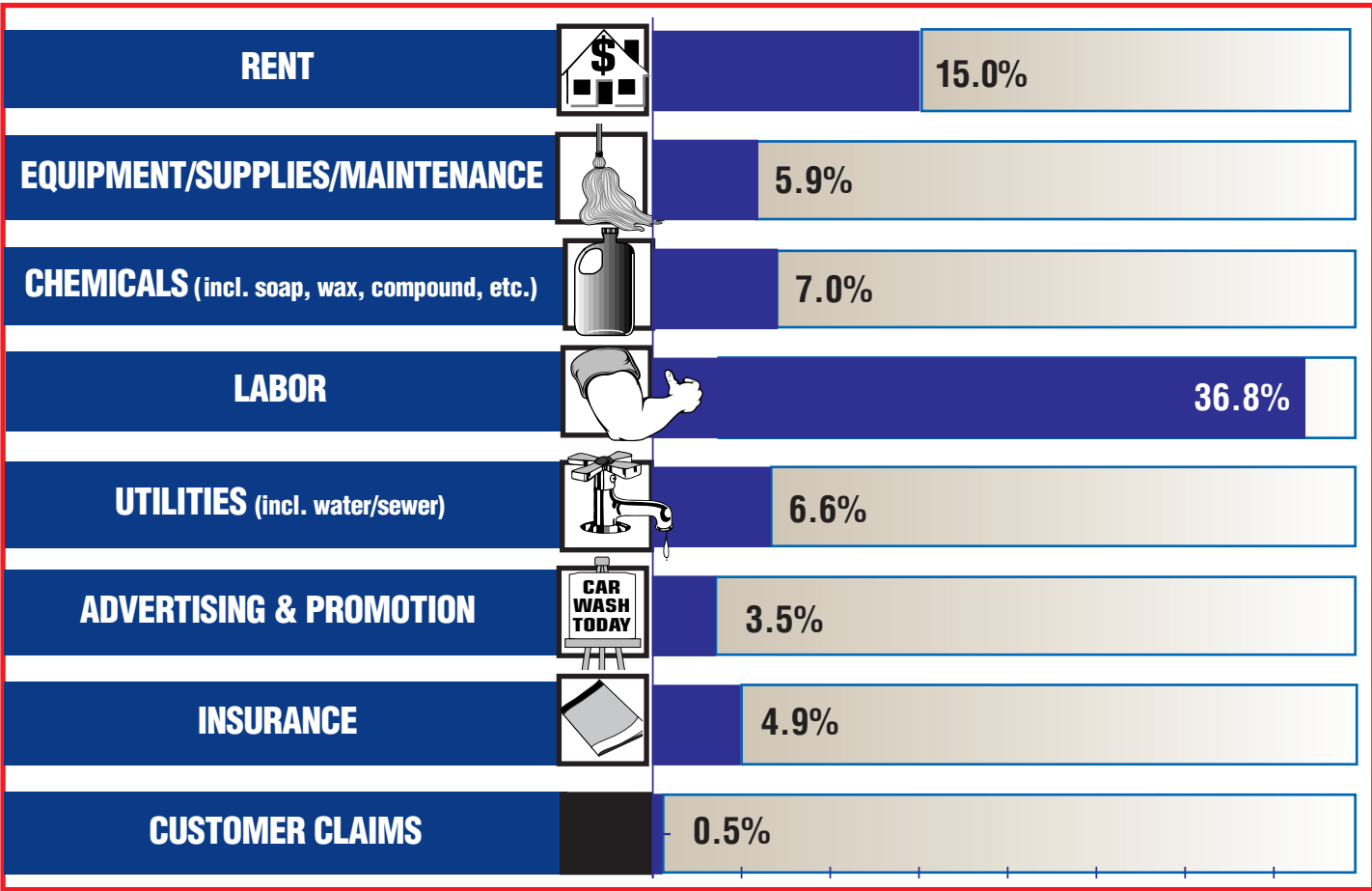
**CUSTOMER PROFILE**

<b>77% – Retail</b>	<b>17% – Auto Dealers</b>
<b>2% – Taxi/Limo</b>	<b>4% – Other</b> <small>(Fleets, Body Shops, Etc.)</small>

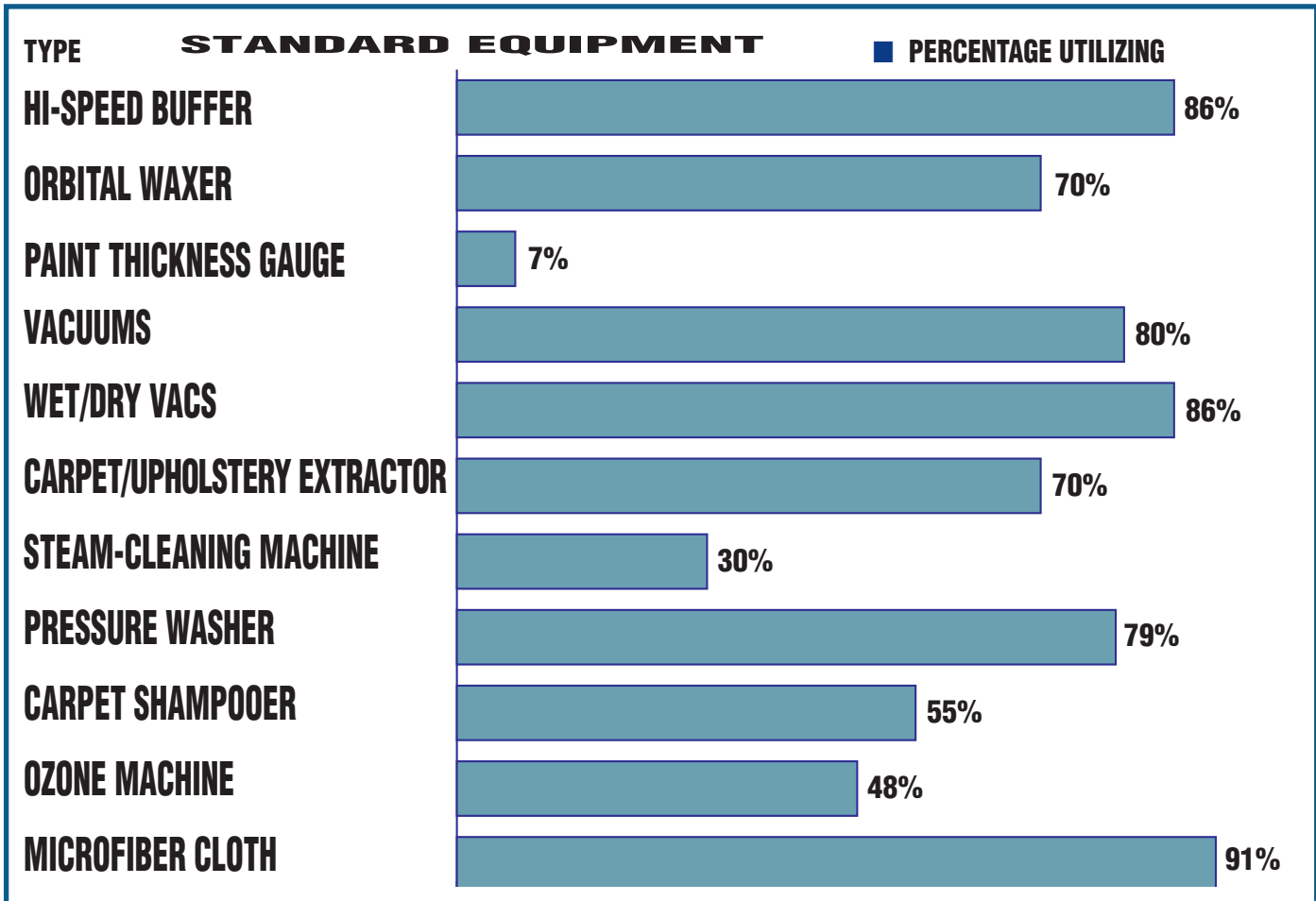
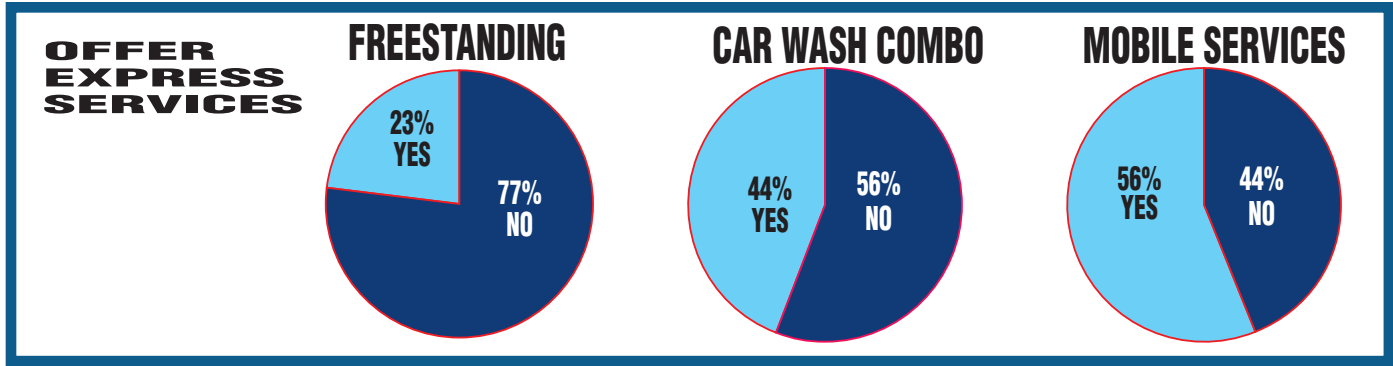
**RETAIL VEHICLE PROFILE**

<b>17% – New</b> (under 1 yr. old)	<b>39% – 3-5 yrs. old</b>
<b>20% – 1-2 yrs. old</b>	<b>24% – 5+ yrs. old</b>

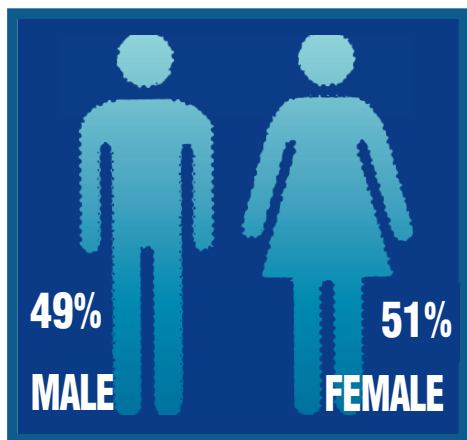
**OPERATING COSTS AS PERCENTAGE OF REVENUE**



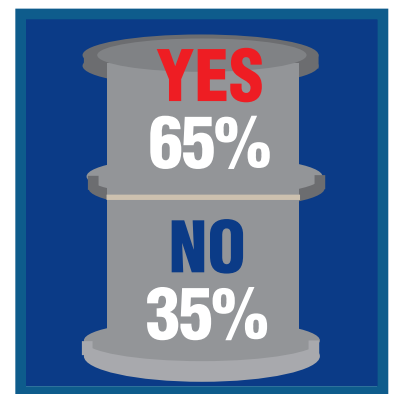
**SURVEY**



**RETAIL CONSUMER PROFILE**



**EMPLOYEE TRAINING IN SAFE CHEMICAL HANDLING**




**AVERAGE PACKAGE PRICES**

<b>RETAIL</b>	<b>FREE-STANDING</b>	<b>CAR WASH COMBO</b>	<b>MOBILE SERVICE</b>
<b>COMPLETE INTERIOR/EXTERIOR DETAIL</b>	<b>\$208.36</b>	<b>\$185.77</b>	<b>\$164.88</b>
<b>INTERIOR DETAIL ONLY</b>	<b>\$119.76</b>	<b>\$110.45</b>	<b>\$72.38</b>
<b>EXTERIOR DETAIL ONLY</b>	<b>\$132.36</b>	<b>\$99.58</b>	<b>\$68.00</b>

<b>WHOLESALE</b>	<b>FREE-STANDING</b>	<b>CAR WASH COMBO</b>	<b>MOBILE SERVICE</b>
<b>COMPLETE INTERIOR/EXTERIOR DETAIL</b>	<b>\$139.06</b>	<b>\$99.17</b>	<b>\$134.00</b>
<b>INTERIOR DETAIL ONLY</b>	<b>\$74.25</b>	<b>\$62.50</b>	<b>\$59.00</b>
<b>EXTERIOR DETAIL ONLY</b>	<b>\$78.75</b>	<b>\$57.25</b>	<b>\$57.00</b>

**LABOR COSTS**



**AVG. WAGE PER HOUR PER EMPLOYEE**

- 12% PAID MINIMUM WAGE**
- 21% PAID MINIMUM to \$10.00 PER HOUR**
- 50% PAID \$10.00 to \$12.00 PER HOUR**
- 17% PAID OVER \$12.00 PER HOUR**

**PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK**

	<b>FREE-STANDING</b>	<b>CAR WASH COMBO</b>	<b>MOBILE SERVICES</b>
<b>MONDAY</b>	17	15	10
<b>TUESDAY</b>	18	14	11
<b>WEDNESDAY</b>	19	14	14
<b>THURSDAY</b>	20	17	18
<b>FRIDAY</b>	21	18	25
<b>SATURDAY</b>	5	18	20
<b>SUNDAY</b>	0	4	2

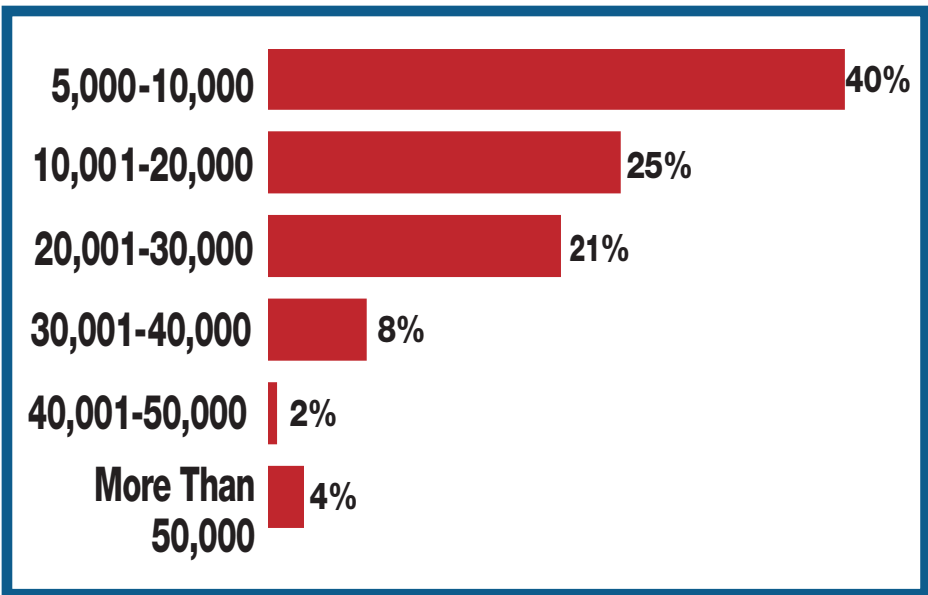
**SURVEY**

**A LA CARTE SERVICES**

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE	
		FREESTANDING	CAR WASH COMBO
HAND WAX	65%	\$78.06	\$42.22
MACHINE WAX/BUFF	67%	\$127.81	\$71.42
CARPET SHAMPOO	76%	\$66.75	\$36.00
UPHOLSTERY CLEANING	73%	\$60.00	\$38.13
LEATHER/VINYL (INT.) DRESSING	65%	\$32.85	\$27.13
VINYL/RUBBER (EXT.) DRESSING	53%	\$26.11	\$8.80
DEODORIZING	55%	\$51.25	\$37.50
PAINT TOUCH-UP	41%	\$73.64	*
PAINTLESS DENT REMOVAL	22%	\$110.00	*
WINDSHIELD REPAIR	14%	\$55.00	\$59.48
EXTENDED UPHOLSTERY PROT.	33%	\$86.88	*
EXTENDED PROT. PAINT SEALANT	31%	\$176.11	\$60.00
HEADLIGHT RESTORATION	55%	\$58.13	\$50.83
ENGINE CLEANING	65%	\$40.63	\$33.75
WINDOW TINTING	20%	\$218.00	*
PINSTRIPING	22%	\$71.43	\$40.00

\* Too Few Responses

**DAILY TRAFFIC COUNT**



**AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)**

