

AutoLaundry^{news}

Results From The *Auto Laundry News*

2018 Detail Survey

The 2018 *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 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. A three-year perspective of the category breakdown appears in the following table:

| Detailer Type | 2018 | 2017 | 2016 |
|-----------------|------|------|------|
| Freestanding | 39% | 39% | 44% |
| Car Wash Combo | 39% | 42% | 37% |
| Mobile Services | 17% | 8% | 12% |
| Other Combo | 5% | 11% | 7% |

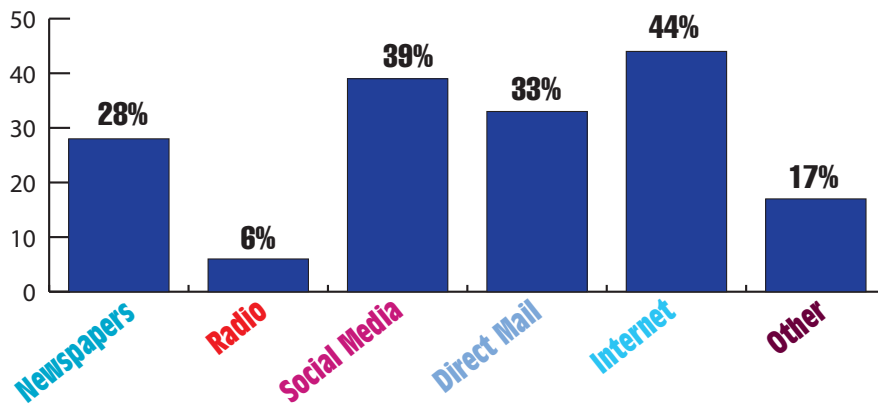
PERFORMANCE

The current survey results speak of steadiness. Overall 53 percent of respondents report improved business compared to the year prior. This is a mere one percentage point down from the results recorded last year. Those who were able to keep performance level account for 41 percent of survey participants, again quite close to the 43 percent who did so the previous year. There is one unfortunate number: While last year a record small percentage (3 percent) reported declining business, that figure has doubled to 6 percent in the current survey. Mobile Services again outperformed the other categories, with 67 percent reporting improved business compared to 57 percent of Freestanding shops and 43 percent of Car Wash Combos.

PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON

| | WINTER | SPRING | SUMMER | FALL |
|-----------------------|--------|--------|--------|------|
| FREE-STANDING | 12 | 32 | 30 | 26 |
| CAR WASH COMBO | 19 | 34 | 28 | 19 |
| MOBILE/OTHER | 17 | 28 | 38 | 17 |

**ADVERTISING & PROMOTION
83% ADVERTISE**



EMPLOYEES

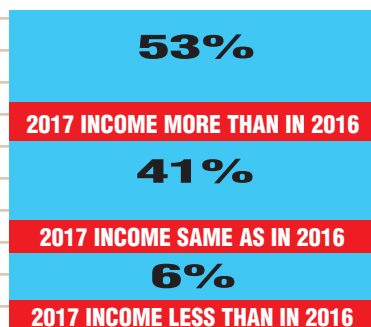
No progress has been made regarding the gender divide in employment — in fact, quite the contrary. In 2008, the survey found that 28 percent of employed detailers were female. By 2015 that figure was down to 19 percent. The current survey yields a percentage of 16 percent.

Overall, 44 percent of respondents report that their employees are certified detailers. The majority cites a detail-product vendor as the certifying body.

FUTURE PLANS

Overall, 17 percent (19 percent, last year) of respondents plan on expanding their car care businesses during the next 12 months. With a single exception, all plans involve detail operations. ☑

INCOME COMPARED TO LAST YEAR



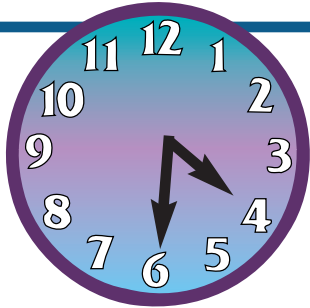
OPERATOR PROFILE

| | |
|--------------------------------|-----|
| Freestanding Detail Shop | 39% |
| Mobile Detailing | 17% |
| Full-Service Conveyor Car Wash | 39% |
| Exterior-Only Car Wash | 6% |
| Self-Serve Car Wash | 11% |
| In-Bay Automatic | 0% |
| Oil Change/Lube | 17% |
| Gas Station | 0% |
| Auto Repair | 6% |

SURVEY

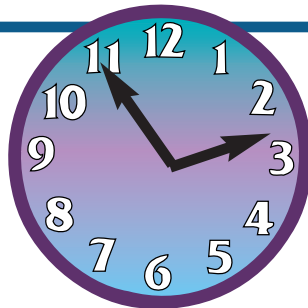
AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE

FREESTANDING



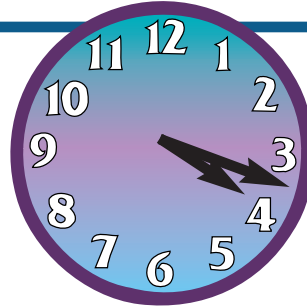
4.5 HOURS

CAR WASH COMBO



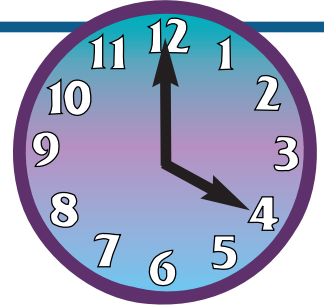
2.9 HOURS

MOBILE SERVICES



4.3 HOURS

OTHER COMBO



4.0 HOURS

DETAIL SERVICE PRICES

CHARGE FROM A FIXED-PRICE MENU

30%

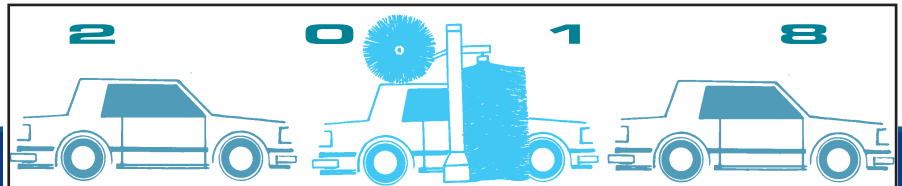
CHARGE ACCORDING TO PER-CAR ESTIMATE

60%

USE BOTH METHODS

10%

AVERAGE NUMBER OF CARS DETAILED ANNUALLY



FREESTANDING

1,225

CAR WASH COMBO

1,650

MOBILE SERVICE

757

EMPLOYEE UNIFORMS

FULL 0%

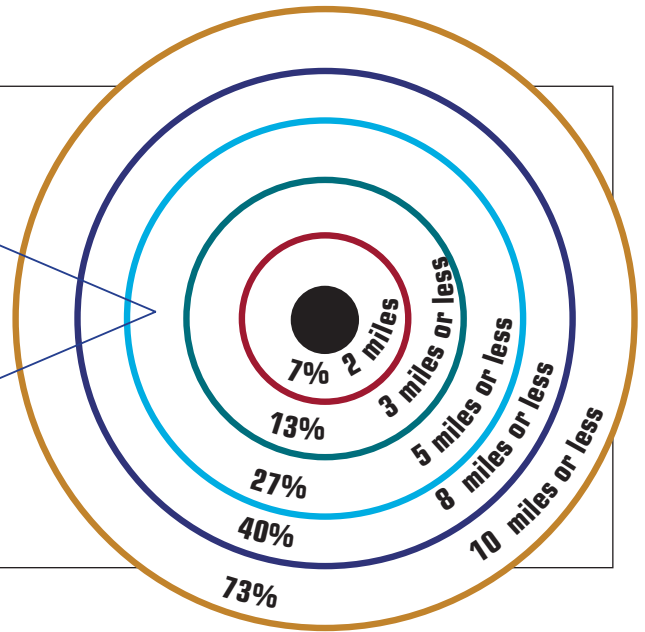
PARTIAL 75%

NONE 25%

COMPETING DETAIL SHOPS IN AREA

| NUMBER OF COMPETITORS | OPERATORS REPORTING |
|-----------------------|---------------------|
| 0 | 0% |
| 1 | 12% |
| 2 | 29% |
| 3 | 23% |
| 4 | 6% |
| 5 | 12% |
| MORE THAN 5 | 18% |

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



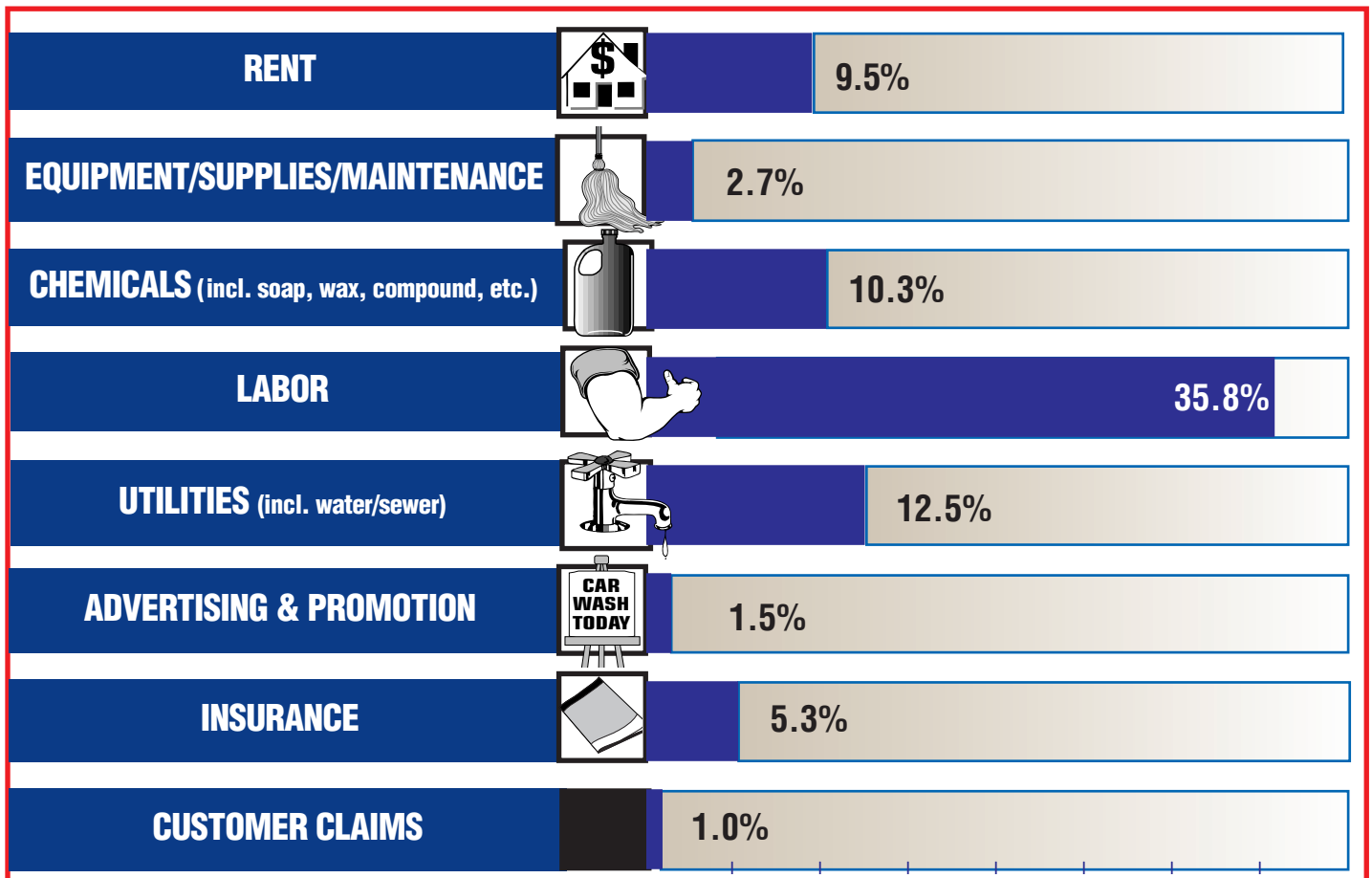
CUSTOMER PROFILE

RETAIL VEHICLE PROFILE

| | |
|----------------|---------------------------------------|
| 84% – Retail | 13% – Auto Dealers |
| 1% – Taxi/Limo | 2% – Other (Fleets, Body Shops, Etc.) |

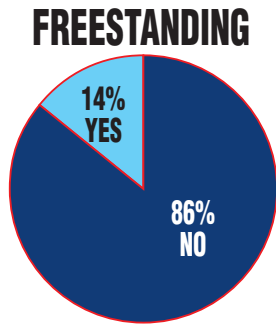
| | |
|-----------------------------|--------------------|
| 13% – New (under 1 yr. old) | 35% – 3-5 yrs. old |
| 26% – 1-2 yrs. old | 26% – 5+ yrs. old |

OPERATING COSTS AS PERCENTAGE OF REVENUE

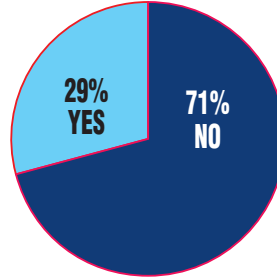


SURVEY

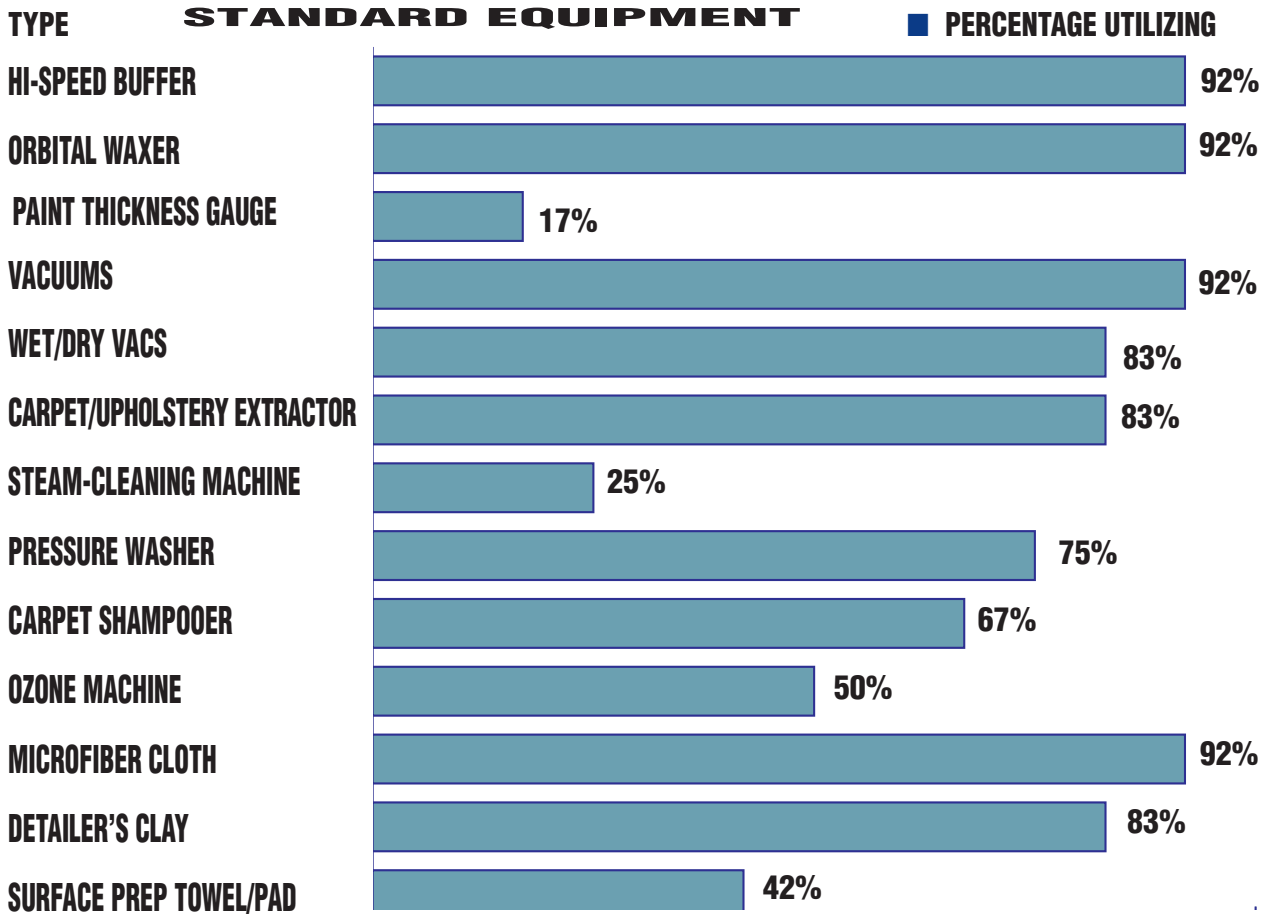
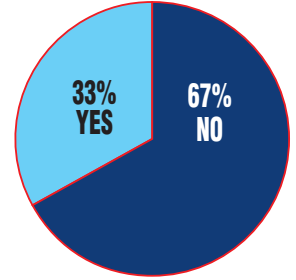
OFFER EXPRESS SERVICES



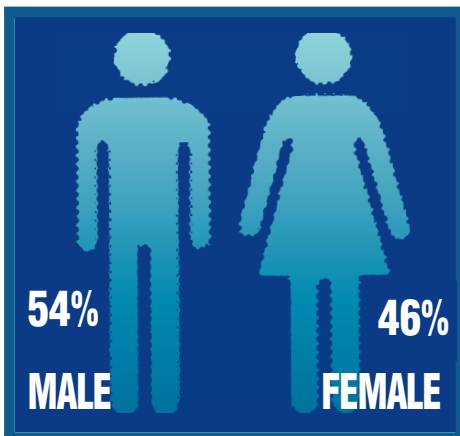
CAR WASH COMBO



MOBILE SERVICES

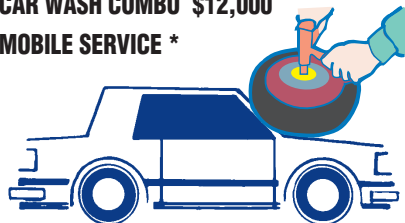


RETAIL CONSUMER PROFILE



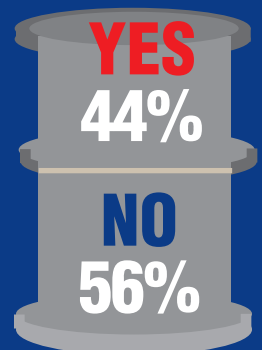
AVERAGE MONTHLY GROSS INCOME (DETAIL SERVICES ONLY)

FREESTANDING \$12,500
 CAR WASH COMBO \$12,000
 MOBILE SERVICE *



* Too Few Responses

EMPLOY CERTIFIED DETAILERS

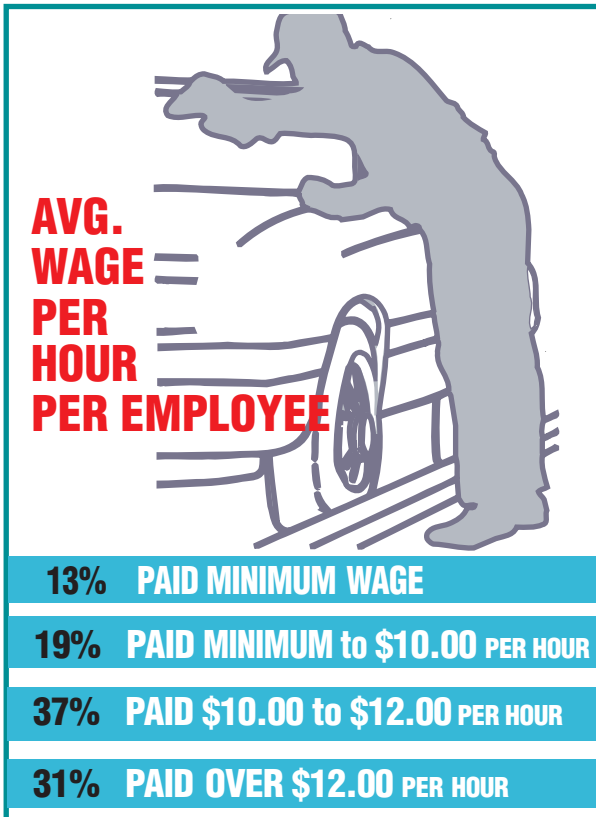


AVERAGE PACKAGE PRICES

| RETAIL | FREE- STANDING | CAR WASH COMBO | MOBILE SERVICE |
|--|---------------------------|---------------------------|---------------------------|
| COMPLETE INTERIOR/EXTERIOR DETAIL | \$191.00 | \$124.75 | \$240.00 |
| INTERIOR DETAIL ONLY | \$135.80 | \$80.00 | \$145.00 |
| EXTERIOR DETAIL ONLY | \$121.80 | \$80.00 | \$145.00 |

| WHOLESALE | FREE- STANDING | CAR WASH COMBO | MOBILE SERVICE |
|--|---------------------------|---------------------------|---------------------------|
| COMPLETE INTERIOR/EXTERIOR DETAIL | \$187.50 | \$110.00 | \$225.00 |
| INTERIOR DETAIL ONLY | \$100.00 | \$72.50 | \$140.00 |
| EXTERIOR DETAIL ONLY | \$133.00 | \$72.50 | \$140.00 |

LABOR COSTS



PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

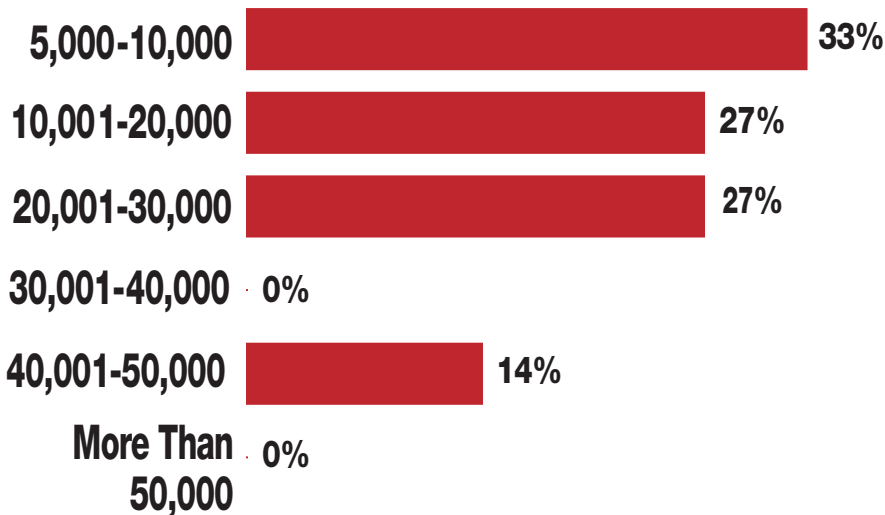
| | FREE- STANDING | CAR WASH COMBO | MOBILE/ OTHER |
|------------------|---------------------------|---------------------------|--------------------------|
| MONDAY | 10 | 13 | 8 |
| TUESDAY | 13 | 14 | 25 |
| WEDNESDAY | 15 | 15 | 10 |
| THURSDAY | 18 | 15 | 28 |
| FRIDAY | 30 | 21 | 25 |
| SATURDAY | 14 | 15 | 4 |
| SUNDAY | 0 | 7 | 0 |

SURVEY

A LA CARTE SERVICES

| SERVICE | PERCENT OFFERING OVERALL | AVERAGE PRICE |
|-------------------------------|--------------------------|---------------|
| HAND WAX | 57% | \$60.00 |
| MACHINE WAX/BUFF | 43% | \$92.50 |
| CARPET SHAMPOO | 64% | \$71.43 |
| UPHOLSTERY CLEANING | 57% | \$76.67 |
| LEATHER/VINYL (INT.) DRESSING | 36% | \$15.67 |
| VINYL/RUBBER (EXT.) DRESSING | 43% | \$30.50 |
| DEODORIZING | 29% | \$105.00 |
| PAINT TOUCH-UP | 29% | \$73.75 |
| PAINTLESS DENT REMOVAL | 21% | \$105.00 |
| WINDSHIELD REPAIR | 29% | \$70.00 |
| EXTENDED UPHOLSTERY PROT. | 36% | \$46.65 |
| EXTENDED PROT. PAINT SEALANT | 50% | \$124.99 |
| HEADLIGHT RESTORATION | 57% | \$96.29 |
| ENGINE CLEANING | 43% | \$44.10 |
| WINDOW TINTING | 14% | \$185.00 |
| PINSTRIPING | 21% | \$133.33 |

DAILY TRAFFIC COUNT



AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

