

AutoLaundry^{news}

Results From The Auto Laundry News

2019 Detail Survey

The 2019 *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.

purposes, on occasion, been 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). For the current survey, we received no responses from mobile detailers. 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 still employed when relevant. A four-year perspective of the

category breakdown appears in the following table:

Detailer Type	2019	2018	2017
Freestanding	52%	39%	39%
Car Wash Combo	38%	39%	42%
Mobile Services	0%	17%	8%
Other Combo	10%	5%	11%

RESPONDENT POOL PROFILE

In the past, respondents have for comparative

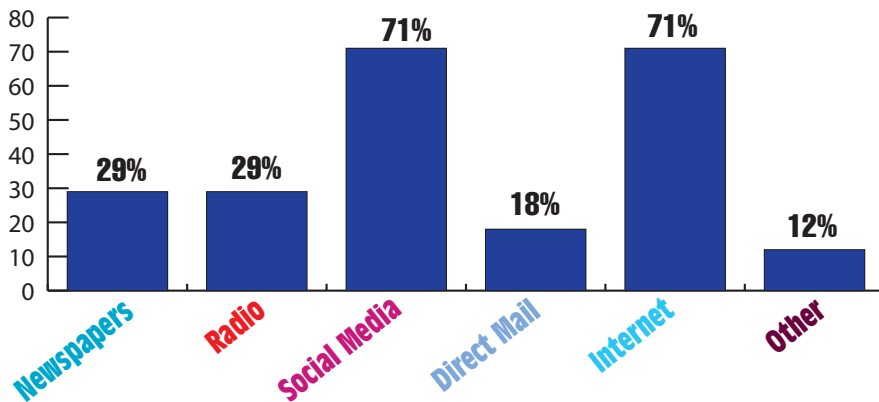
PERFORMANCE

After two years of results that had a majority of respondents overall record improvement in their business year over year (54 percent in 2017 and 53 percent in 2018), only 44 percent of current survey participants were able to report such a feat. The same proportion as last year (41 percent) saw neither improvement nor deterioration. Two years ago, an admirably small 3 percent overall reported declining business, a figure that doubled to 6 percent the following year. This year that number stands at 15 percent. Freestanding shops outperformed Car Wash Combos, with 57 percent reporting improved business compared to 36 percent of Car Wash Combos. On the reversal front, the two categories are more evenly matched: 14 percent of Freestanding shops and 18 percent of Car Wash Combos report being worse off than one year ago.

PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON

	WINTER	SPRING	SUMMER	FALL
FREE-STANDING	14	26	38	22
CAR WASH COMBO	20	33	25	22
OTHER	28	32	20	20

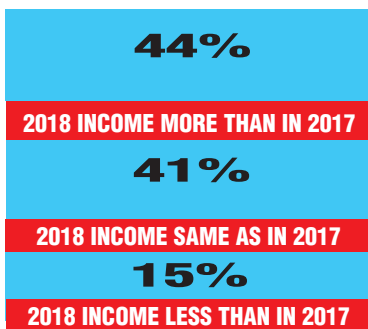
ADVERTISING & PROMOTION
59% ADVERTISE



SERVICES

All Freestanding shops provide services to both retail and wholesale customers. However, while they all offer retail customers the choice of either exterior or interior cleaning or a combination, only half allow wholesale customers the same privilege, an exterior-interior combination being the only option. Only 57 percent of Car Wash Combos provide services to wholesale customers, but they have the same options as do retail customers.

INCOME COMPARED TO LAST YEAR



OPERATOR PROFILE

Freestanding Detail Shop	52%
Mobile Detailing	0%
Full-Service Conveyor Car Wash	24%
Exterior-Only Car Wash	14%
Self-Serve Car Wash	10%
In-Bay Automatic	14%
Oil Change/Lube	14%
Gas Station	0%
Other	3%

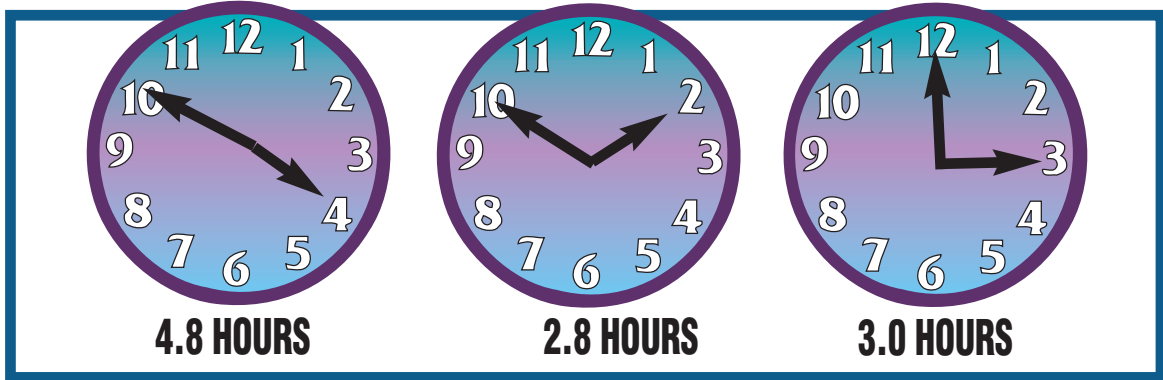
SURVEY

AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE

FREESTANDING

CAR WASH COMBO

OTHER COMBO



DETAIL SERVICE PRICES

CHARGE FROM A FIXED-PRICE MENU

39%

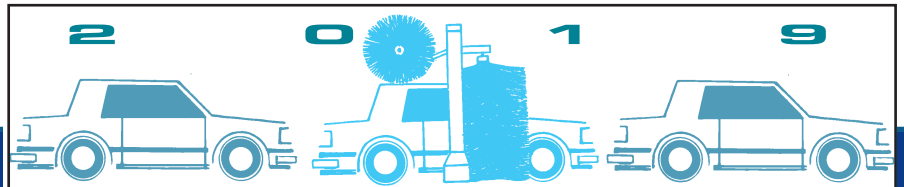
CHARGE ACCORDING TO PER-CAR ESTIMATE

46%

USE BOTH METHODS

15%

AVERAGE NUMBER OF CARS DETAILED ANNUALLY



FREESTANDING

1,110

CAR WASH COMBO

2,217

OTHER

1,300

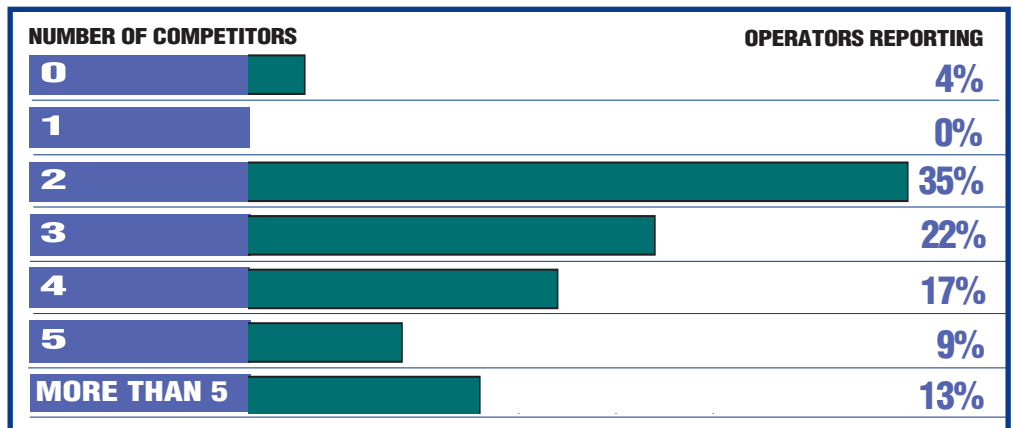
EMPLOYEE UNIFORMS

FULL 3%

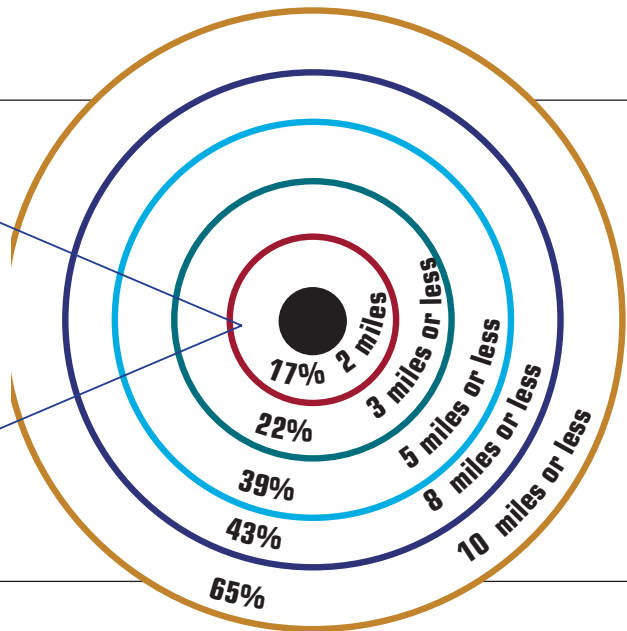
PARTIAL 70%

NONE 27%

COMPETING DETAIL SHOPS IN AREA



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



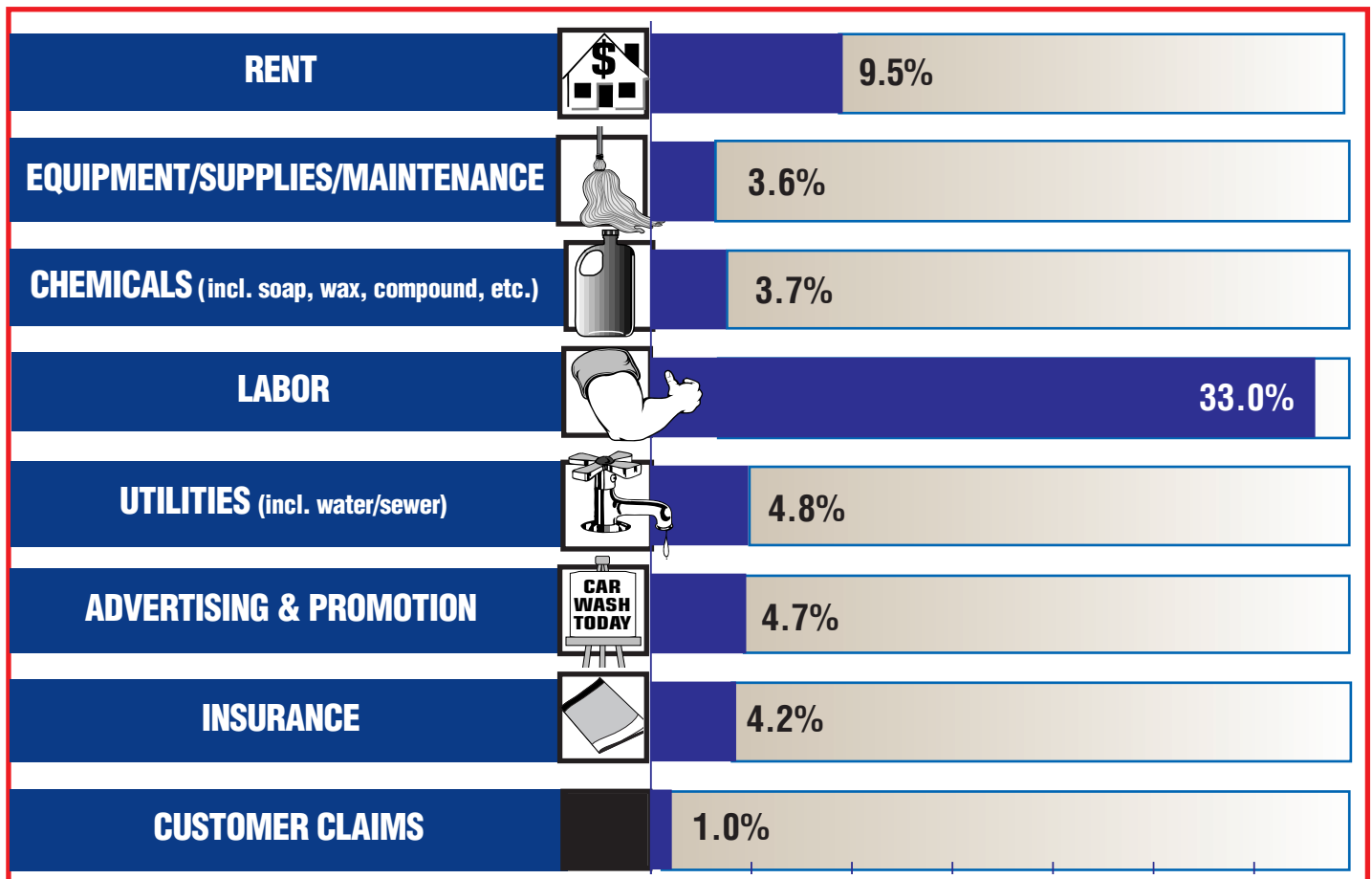
CUSTOMER PROFILE

RETAIL VEHICLE PROFILE

74% – Retail	22% – Auto Dealers
3% – Taxi/Limo	1% – Other (Fleets, Body Shops, Etc.)

14% – New (under 1 yr. old)	38% – 3-5 yrs. old
27% – 1-2 yrs. old	21% – 5+ yrs. old

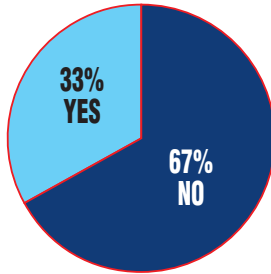
OPERATING COSTS AS PERCENTAGE OF REVENUE



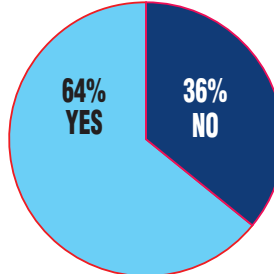
SURVEY

OFFER EXPRESS SERVICES

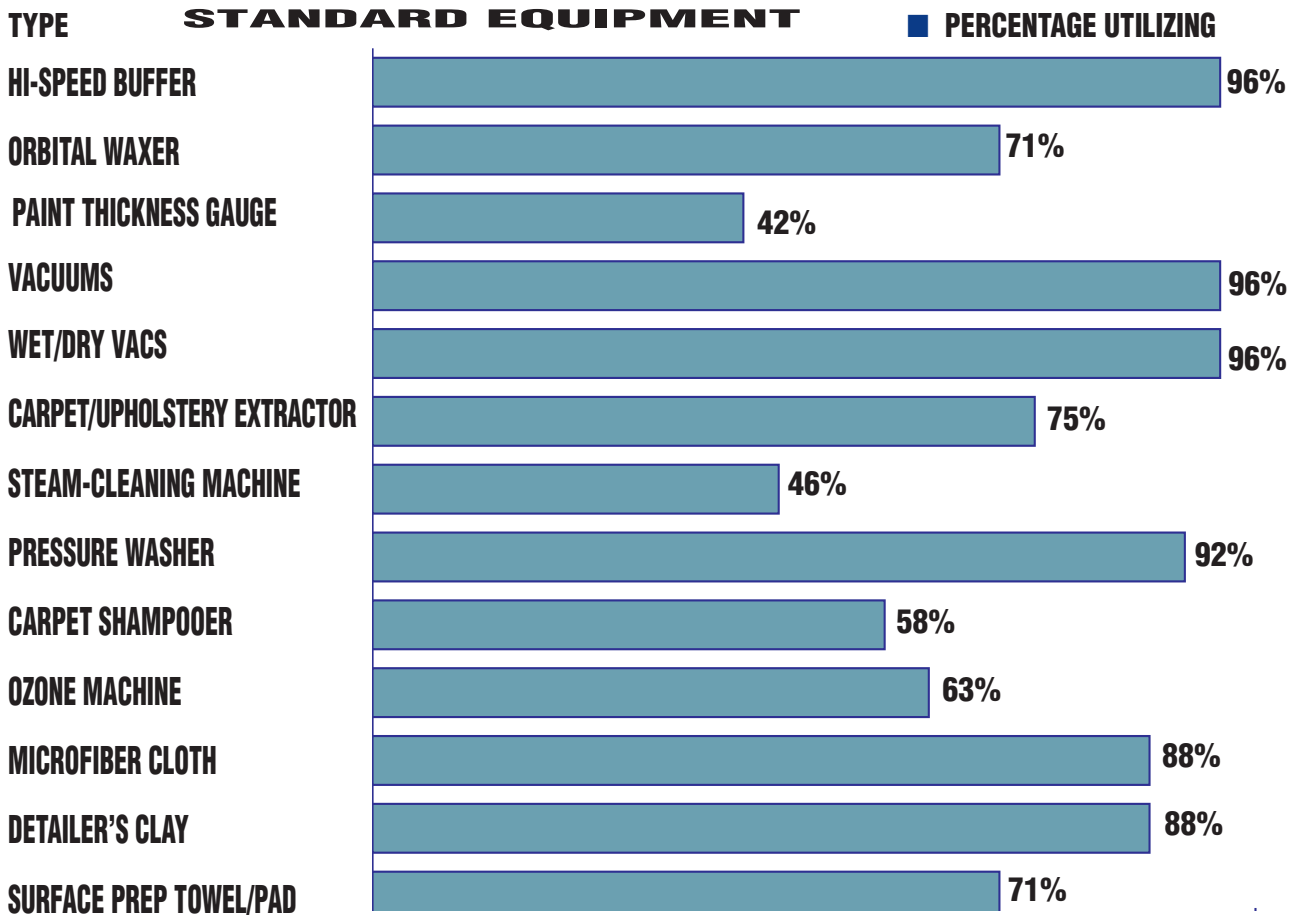
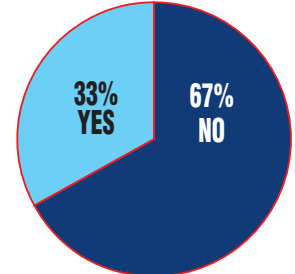
FREESTANDING



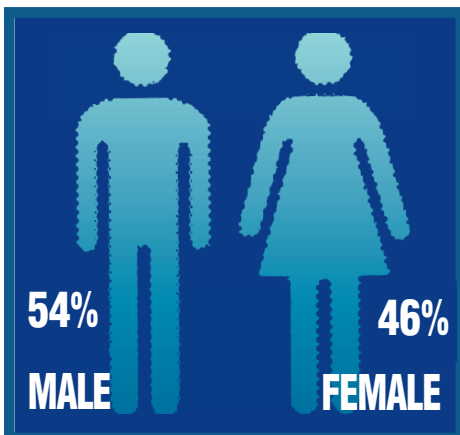
CAR WASH COMBO



OTHER COMBO

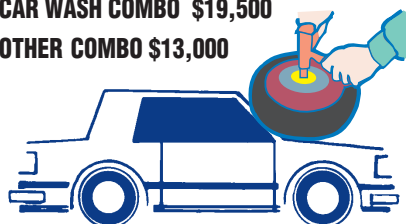


RETAIL CONSUMER PROFILE

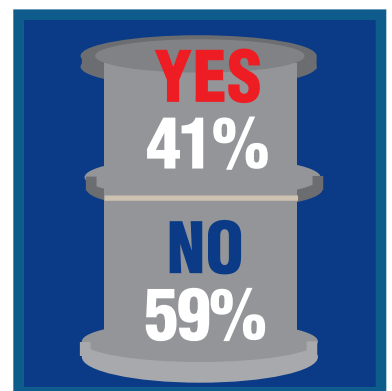


AVERAGE MONTHLY GROSS INCOME (DETAIL SERVICES ONLY)

FREESTANDING \$13,500
 CAR WASH COMBO \$19,500
 OTHER COMBO \$13,000



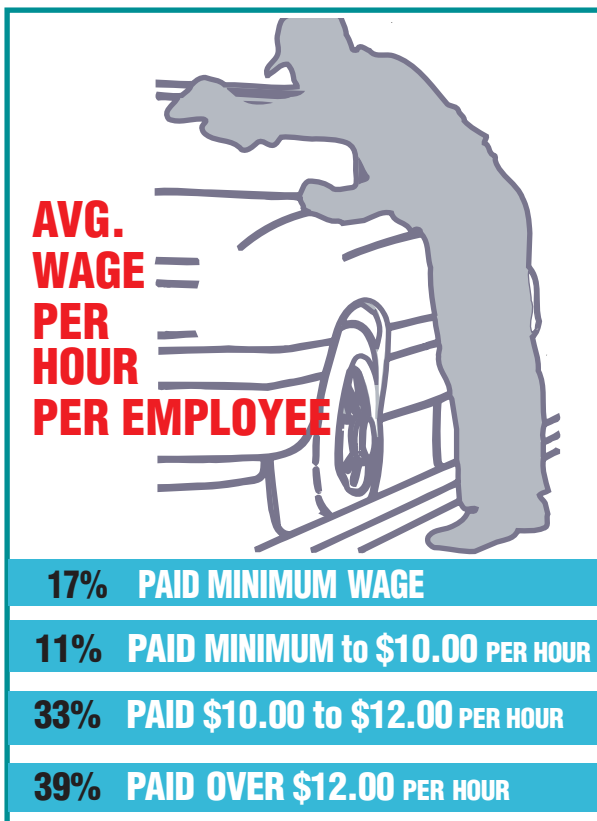
EMPLOY CERTIFIED DETAILERS



AVERAGE PACKAGE PRICES

RETAIL	FREE-STANDING	CAR WASH COMBO
COMPLETE INTERIOR/EXTERIOR DETAIL	\$257.42	\$228.71
INTERIOR DETAIL ONLY	\$144.58	\$120.14
EXTERIOR DETAIL ONLY	\$143.75	\$135.57
WHOLESALE	FREE-STANDING	CAR WASH COMBO
COMPLETE INTERIOR/EXTERIOR DETAIL	\$182.92	\$195.75
INTERIOR DETAIL ONLY	\$118.33	\$113.15
EXTERIOR DETAIL ONLY	\$115.00	\$120.00

LABOR COSTS



PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

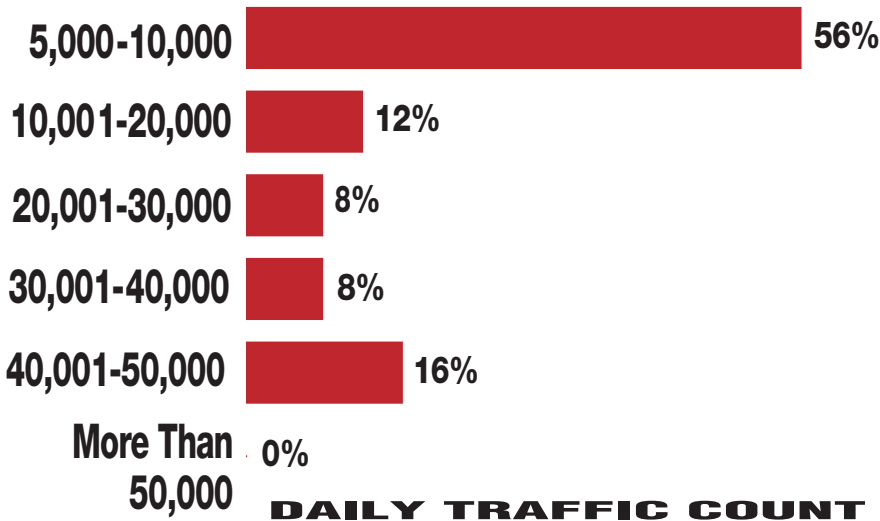
	FREE-STANDING	CAR WASH COMBO
MONDAY	15	11
TUESDAY	20	10
WEDNESDAY	20	8
THURSDAY	21	13
FRIDAY	19	24
SATURDAY	5	27
SUNDAY	0	7

SURVEY

A LA CARTE SERVICES

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE
HAND WAX	64%	\$85.86
MACHINE WAX/BUFF	44%	\$112.90
CARPET SHAMPOO	60%	\$68.31
UPHOLSTERY CLEANING	32%	\$59.43
LEATHER/VINYL (INT.) DRESSING	52%	\$39.00
VINYL/RUBBER (EXT.) DRESSING	40%	\$26.29
DEODORIZING	52%	\$40.36
PAINT TOUCH-UP	48%	\$44.13
PAINTLESS DENT REMOVAL	16%	\$75.00
WINDSHIELD REPAIR	20%	\$40.00
EXTENDED UPHOLSTERY PROT.	28%	\$86.60
EXTENDED PROT. PAINT SEALANT	24%	\$317.50
HEADLIGHT RESTORATION	68%	\$59.54
ENGINE CLEANING	52%	\$40.00
WINDOW TINTING	24%	\$156.25
PINSTRIPING	8%	*
CERAMIC COATING	32%	\$353.75

* Too few responses



AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

