

AutoLaundry^{news}

Results From The Auto Laundry News 2019 Self-Service Survey

The 2019 *Auto Laundry News* Self-Service Survey was conducted through a 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.

For purposes of comparison, survey responses from sites with in-bay automatics (sites with) and sites without this type of equipment (sites without) are on occasion tabulated separately. In the current survey, participating locations with in-bay automatics make up 44 percent of the total response. Some sites without operate conveyor washes along with their wand bays. These sites account for 7 percent of the total responses, while sites that offer wand bays only make up 49 percent.

Revenues

While there was little movement over the previous five years, this year's survey shows some significant change. For the first time since 2014 a minority (43 percent) — though still a plurality — of survey respondents, overall, report income growth compared to the previous year. This compares to 50 percent in the previous survey who reported improvement and 52 percent the year before that. Perhaps deserving of more attention is the jump in the percentage of respondents who report a year-over-year decrease in income — 29 percent versus 17 percent. The graphic on page 55 provides a six-year perspective.


Sites with continue to outperform sites without, but less so than in the past. Compared to 58 percent last year, 50 percent of sites with report higher revenues, while 36 percent (37 percent last year) of sites without do so. Nearly a third (30 percent) of sites with report diminished income; 27 percent of sites without experienced reversal.

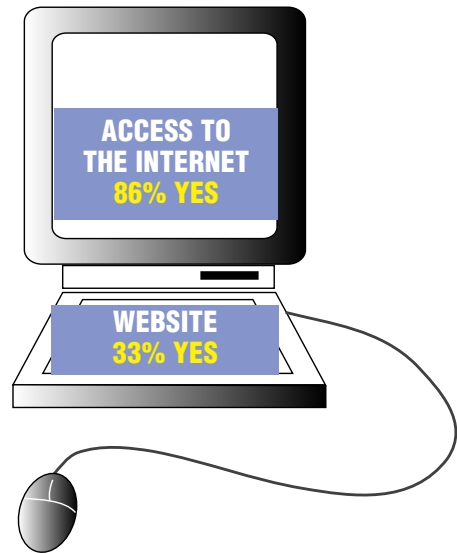
Equipment

Overall, 36 percent of respondents are planning to purchase new equipment during the 12 months ahead. In a reversal of last year's results, sites without, at 42 percent, are far more likely to make purchases compared to sites with at 31 percent. Comparable figures from last year's survey are 27 percent and 35 percent, respectively. In-bay handheld dryers top the shopping list this year. The graphic below shows further detail.

Sites with again reported adding new equipment during the previous 12 months in greater numbers than did sites without — 22 percent (27 percent last year) versus 19 percent (16 percent last year). LED lighting joins in-bay automatics as the two most popular additions.

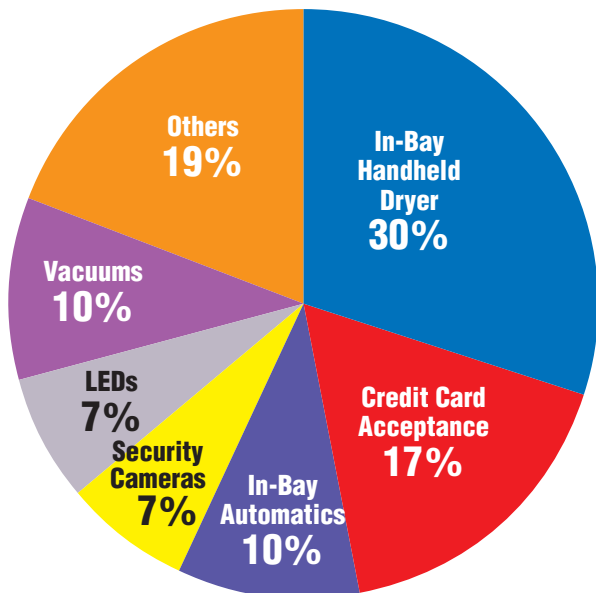
Future

Survey participants continue to show a preference for buying as opposed to building additional sites at a fairly consistent rate compared to last year. The graphic on page 55 provides a seven-year perspective. Sites with are more than twice as likely to plan expansion (through either building or buying) than sites without. 



NEW EQUIPMENT

36% of operators plan to add equipment in the next 12 months



RESPONDENTS OPERATING AN IN-BAY AUTOMATIC ON THEIR COIN-OP LOCATION



SURVEY

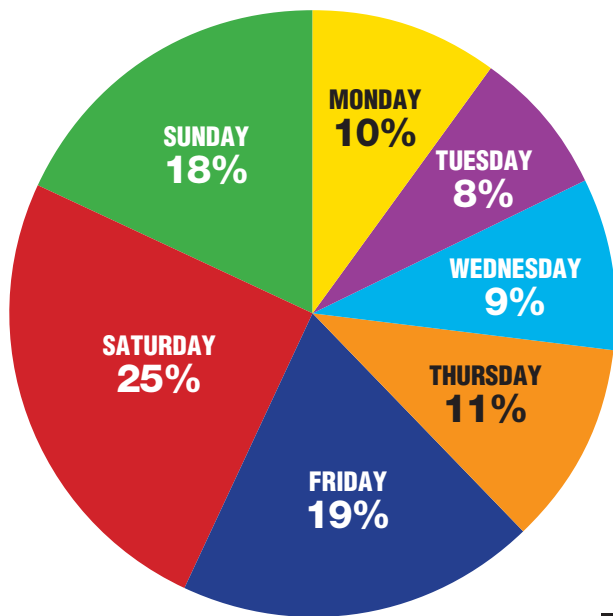
PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	18	31	35	16
Mountain	29	28	26	17
Midwest	16	32	21	30
Central	34	23	26	18
South Central	28	25	23	24
Southeast	34	30	16	20
Mid-Atlantic	35	27	19	19
New England	40	25	15	20

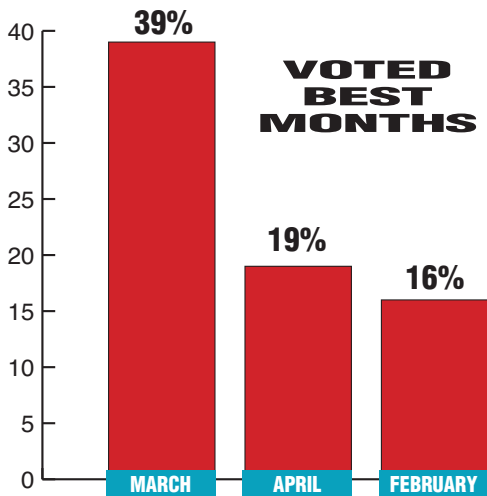
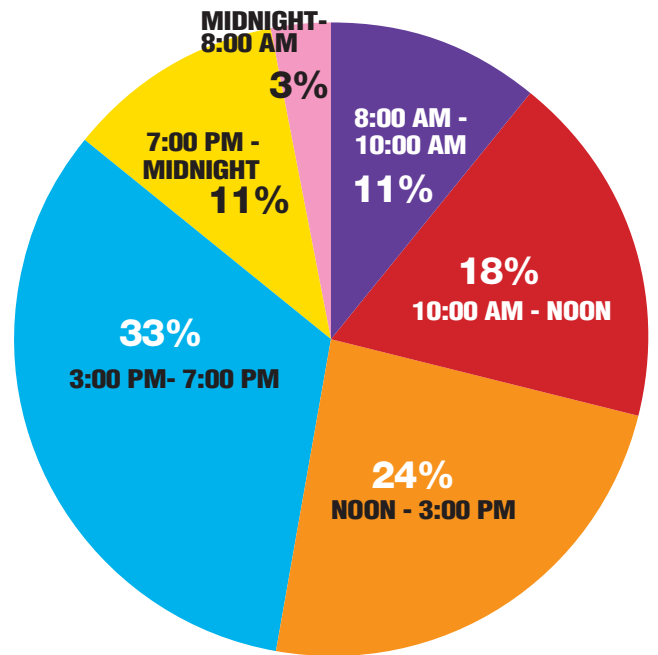
NOTE: Some results do not total 100 due to rounding

- 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



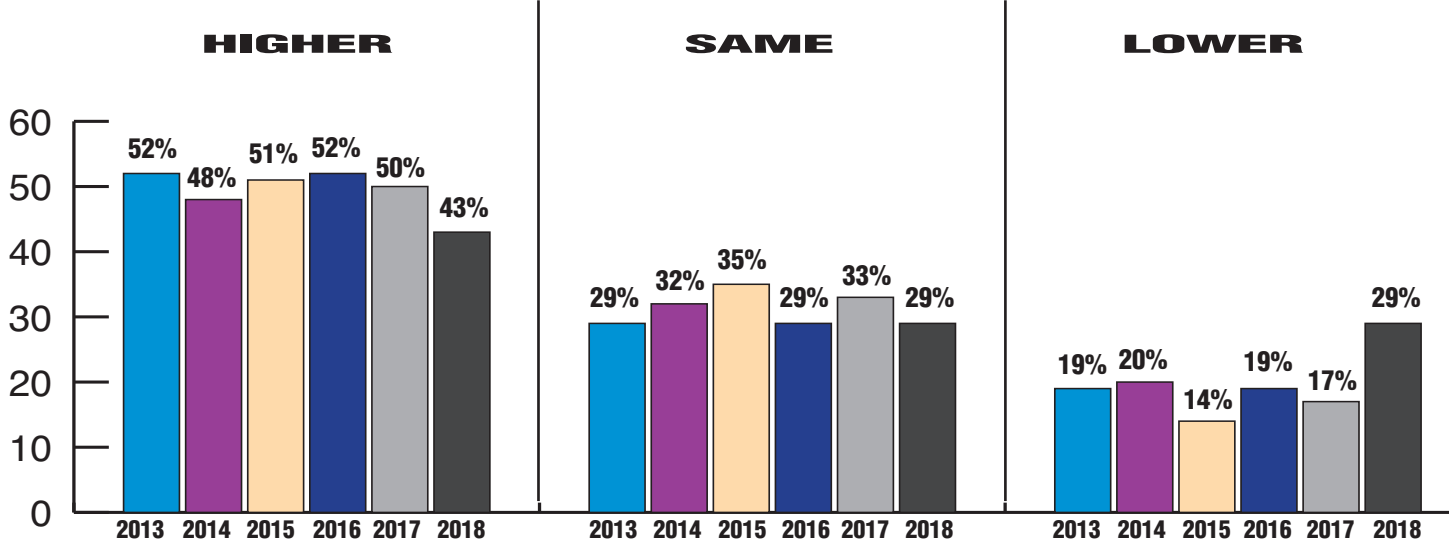
PERCENTAGE OF WASH BUSINESS DONE BY HOUR OF THE DAY



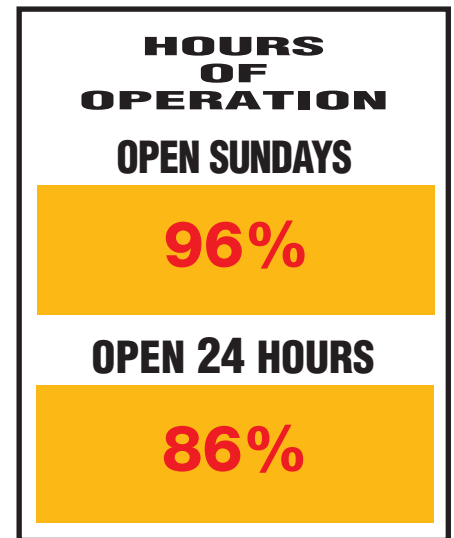
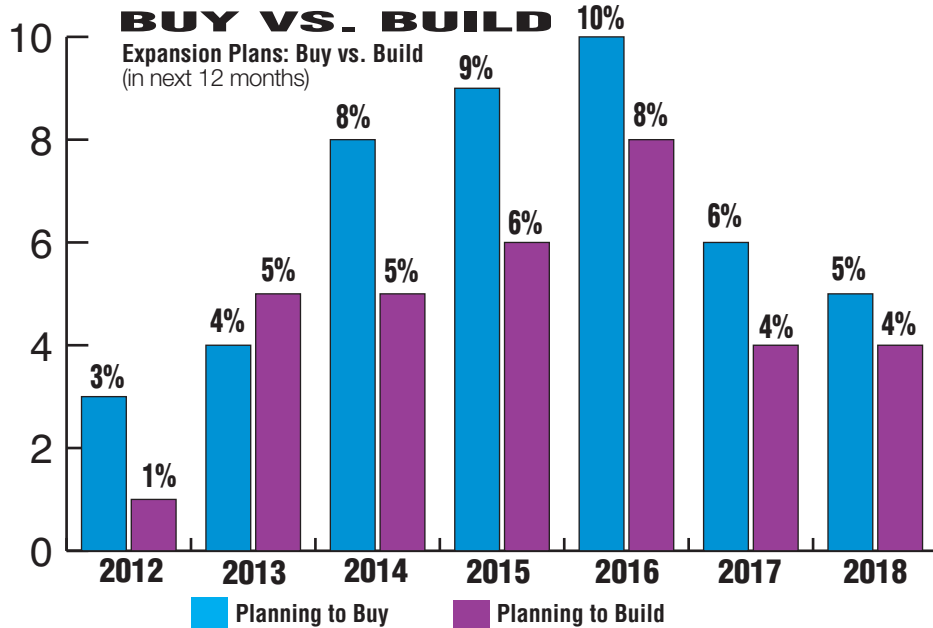
ATTENDANT

	2014	2015	2016	2017	2018
FULL-TIME	20%	18%	16%	16%	19%
PART-TIME	39%	51%	45%	32%	31%
NONE	41%	31%	39%	52%	50%

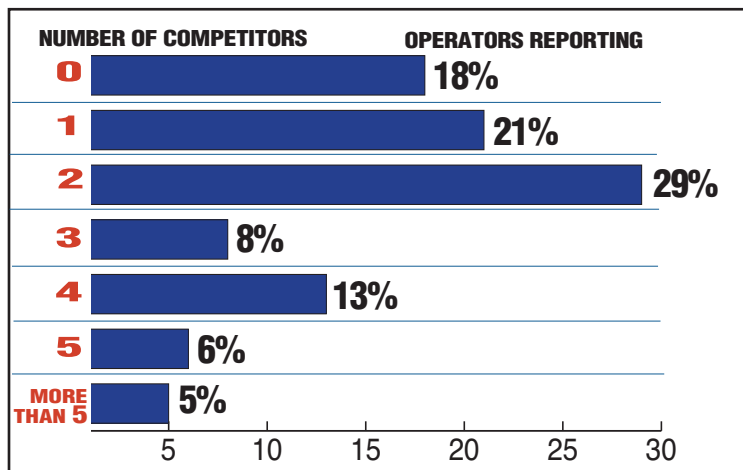
INCOME (COMPARED TO PREVIOUS YEAR)



EXPANSION PLANS

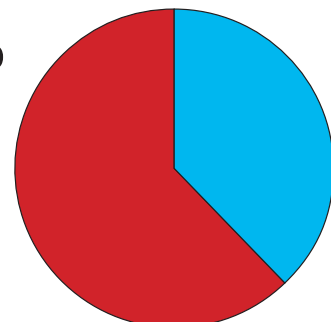


COMPETING SELF-SERVE IN AREA



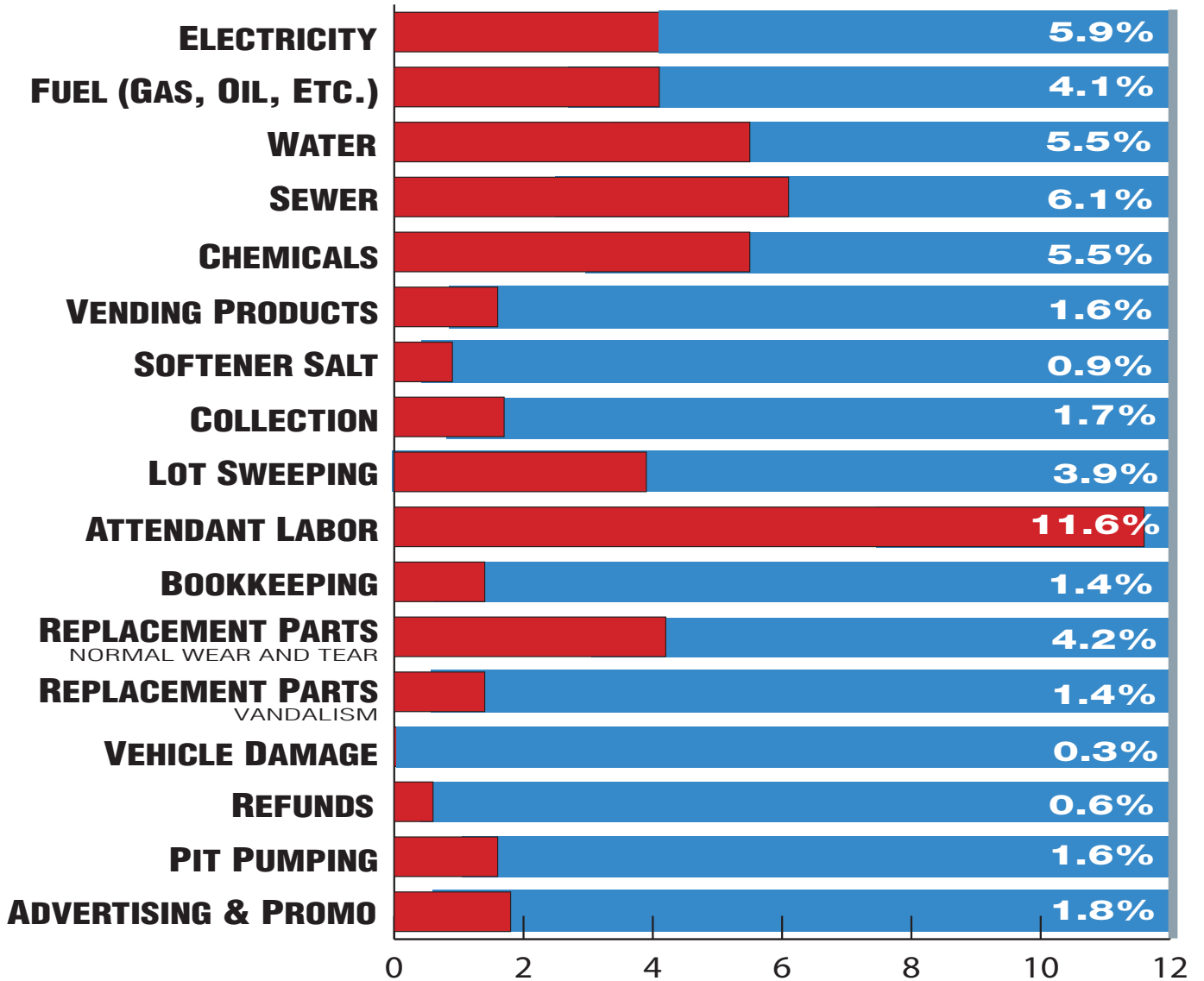
RESPONDENTS WHO OPERATE A COMBINED AUTOMATIC/SELF-SERVICE FACILITY

62%
AUTOMATIC WASH REVENUES AS PERCENTAGE OF TOTAL INCOME



38%
SELF-SERVE WASH REVENUES AS PERCENTAGE OF TOTAL INCOME

EXPENSES (Operating Costs As Percentage of Total Monthly Revenues)



THE AVERAGE
MONTHLY
GROSS
INCOME
PER BAY
WAS

\$1,313



THE
AVERAGE
MONTHLY
GROSS
INCOME
PER
VACUUM
WAS

\$240



THE
AVERAGE
MONTHLY
GROSS
INCOME
FOR
VENDING
WAS

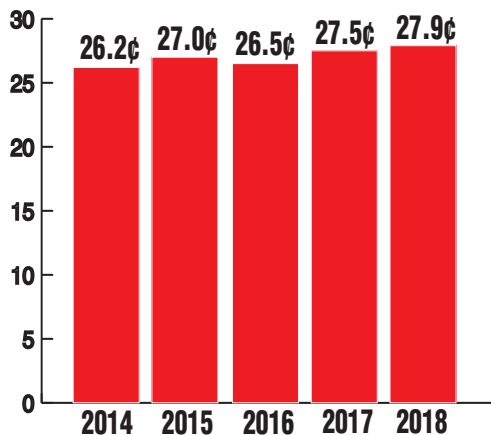
\$353



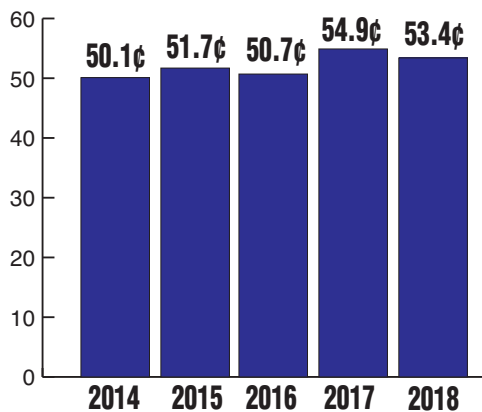
CURRENT EQUIPMENT

PRICE

VACUUMS PRICE PER MINUTE



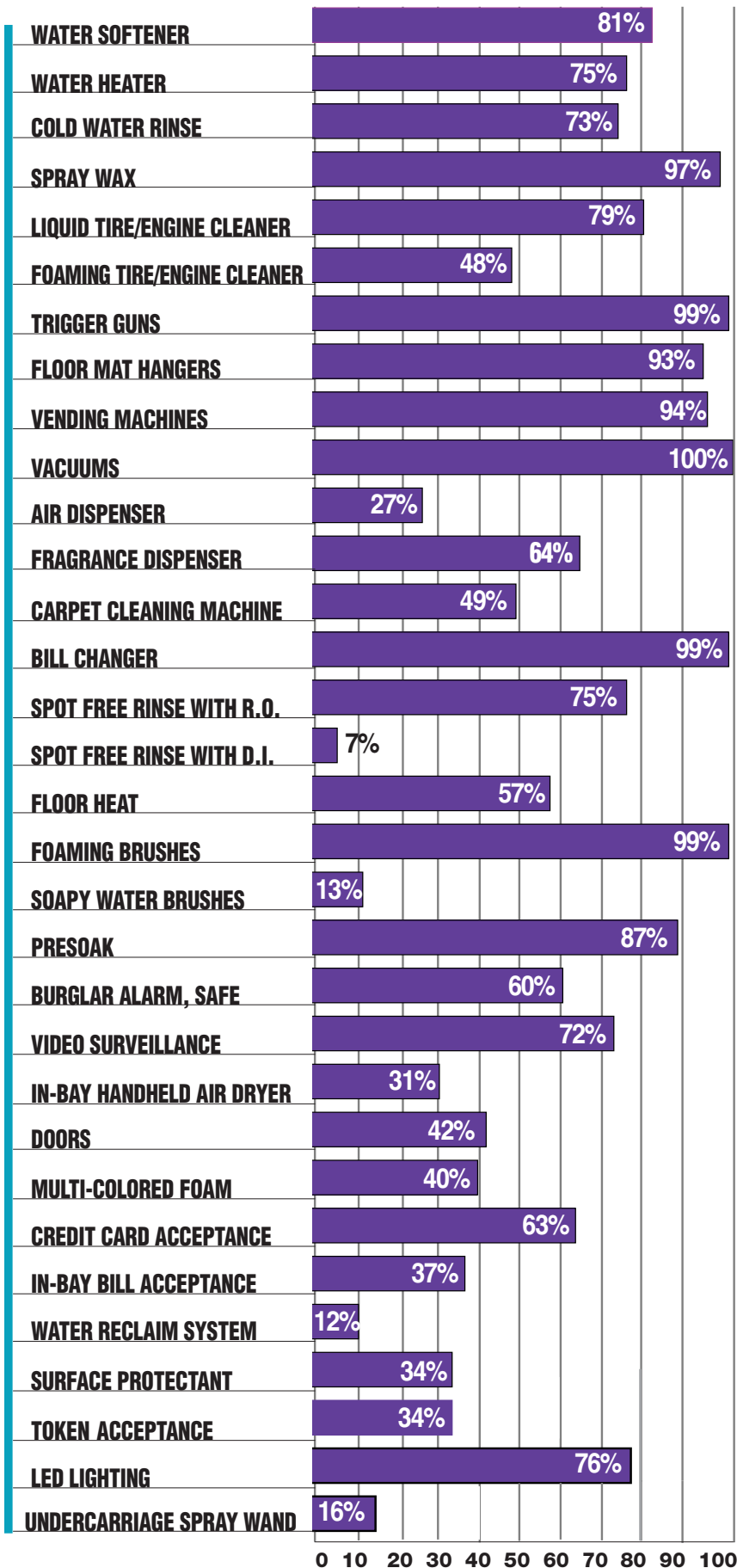
WASH BAYS PRICE PER MINUTE



EXPRESS EXTERIOR NEARBY

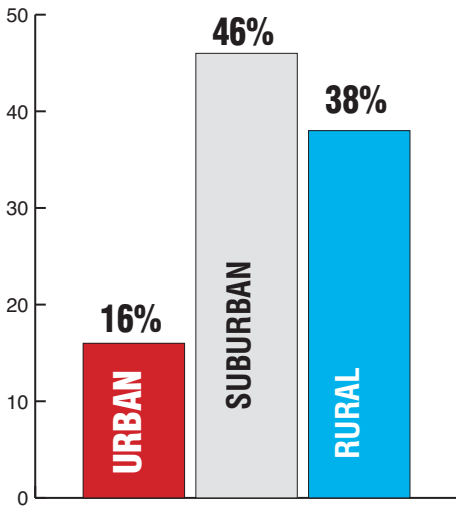
No 47%
Yes 53%

HAS HURT BUSINESS	HAS NOT HURT BUSINESS
44%	56%

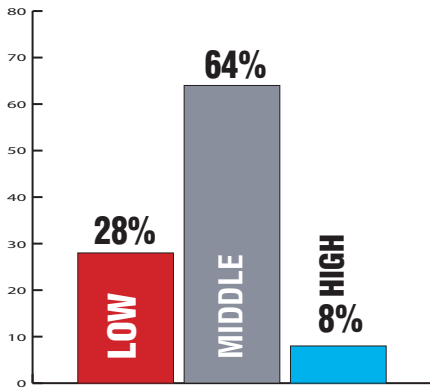


SURVEY

SITE LOCATION

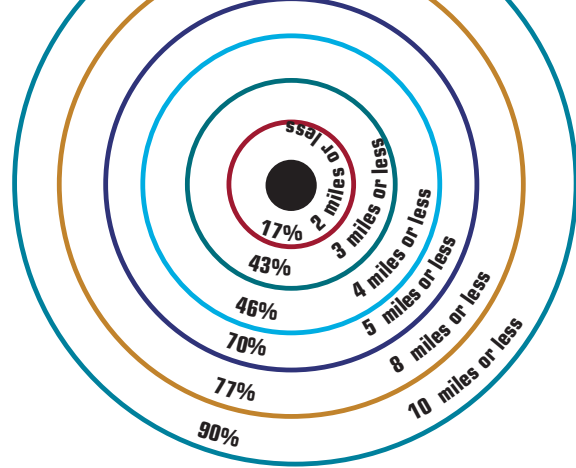


MARKET INCOME LEVEL



MARKET SIZE

HOW FAR DO CUSTOMERS COME?



AUTOMATICS

