

# AutoLaundry<sup>news</sup>

Results From The *Auto Laundry News*

# 2020 Detail Survey

The 2020 *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.

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. Of note is the sharp decline in the percentage of responses from Car Wash Combos and the return of the response rate from Mobile Services to something closer to the norm. A

three-year perspective of the category breakdown appears in the following table:

Detailer Type	2020	2019	2018
Freestanding	63%	52%	39%
Car Wash Combo	16%	38%	39%
Mobile Services	12%	0%	17%
Other Combo	9%	10%	5%

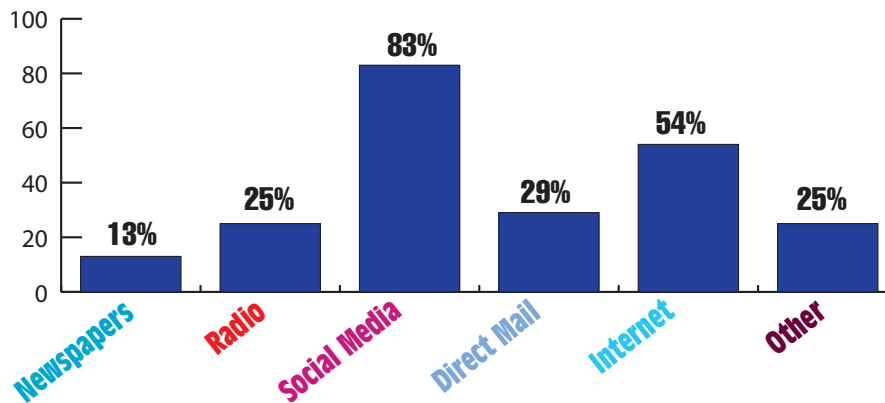
## RESPONDENT POOL PROFILE

For comparative purposes, respondents are,

## PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON

	WINTER	SPRING	SUMMER	FALL
<b>FREE-STANDING</b>	17	33	26	24
<b>CAR WASH COMBO</b>	18	32	22	28
<b>MOBILE</b>	34	29	16	21

## ADVERTISING & PROMOTION 75% ADVERTISE



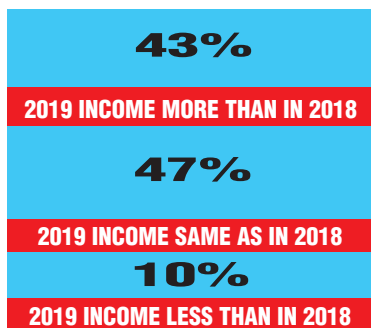
## PERFORMANCE

Last year, for the first time in three years, a minority (44 percent) of respondents overall reported improvement in their business year over year. That was not the aberration hoped for. In the current survey, only 43 percent of respondents report such progress. The proportion of those experiencing no change has grown from 41 percent last year to 47 percent currently. Only 10 percent of participants report declining business compared to 15 percent who did so last year. In a reversal from last year's results, Car Wash Combos outperformed Freestanding shops, with 60 percent reporting improved business compared to 42 percent of Freestanding shops. Only a third of Mobile Services managed improvements.

## 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; in 2018 it was 16 percent. The current survey yields a percentage of 18. Freestanding shops employ the most females: 22 percent of personnel. For Car Wash Combos the percentage is 7.

## INCOME COMPARED TO LAST YEAR

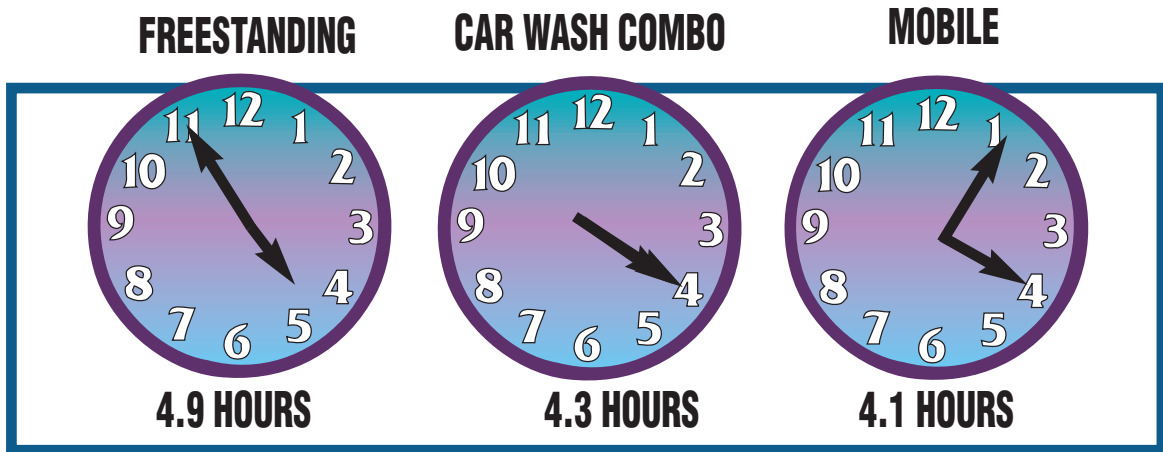


## OPERATOR PROFILE

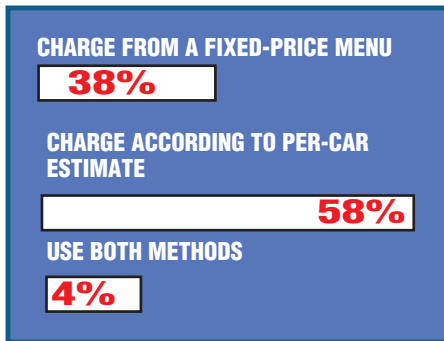
Freestanding Detail Shop	63%
Mobile Detailing	12%
Full-Service Conveyor Car Wash	16%
Exterior-Only Car Wash	0%
Self-Serve Car Wash	0%
In-Bay Automatic	0%
Oil Change/Lube	3%
Gas Station	3%
Other	3%

## SURVEY

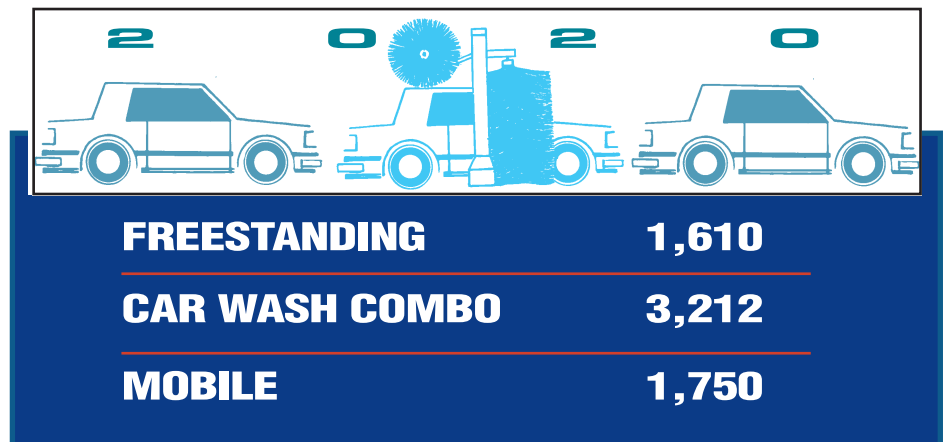
### AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE



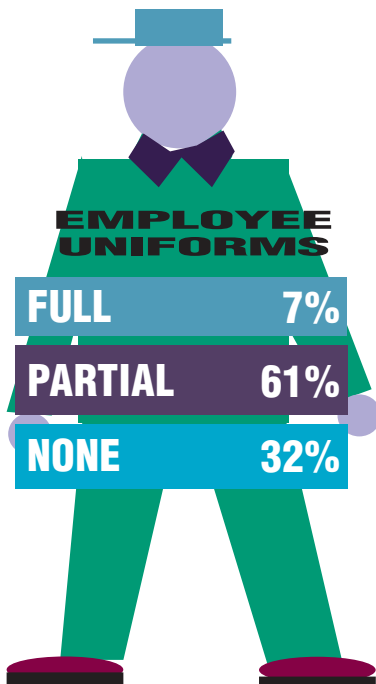
### DETAIL SERVICE PRICES



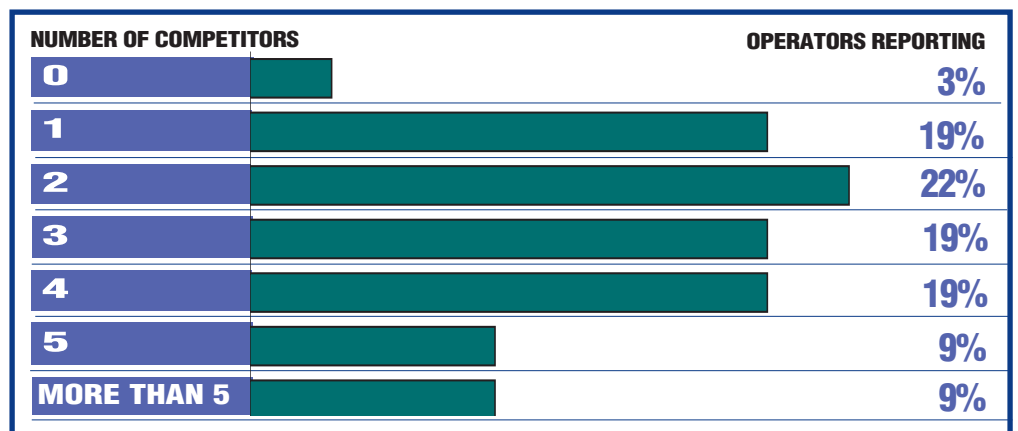
### AVERAGE NUMBER OF CARS DETAILED ANNUALLY



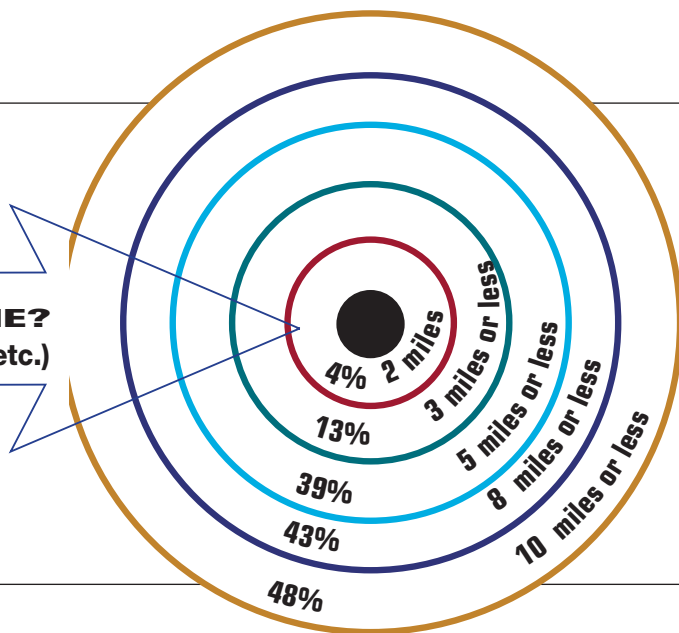
### EMPLOYEE UNIFORMS



### COMPETING DETAIL SHOPS IN AREA



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



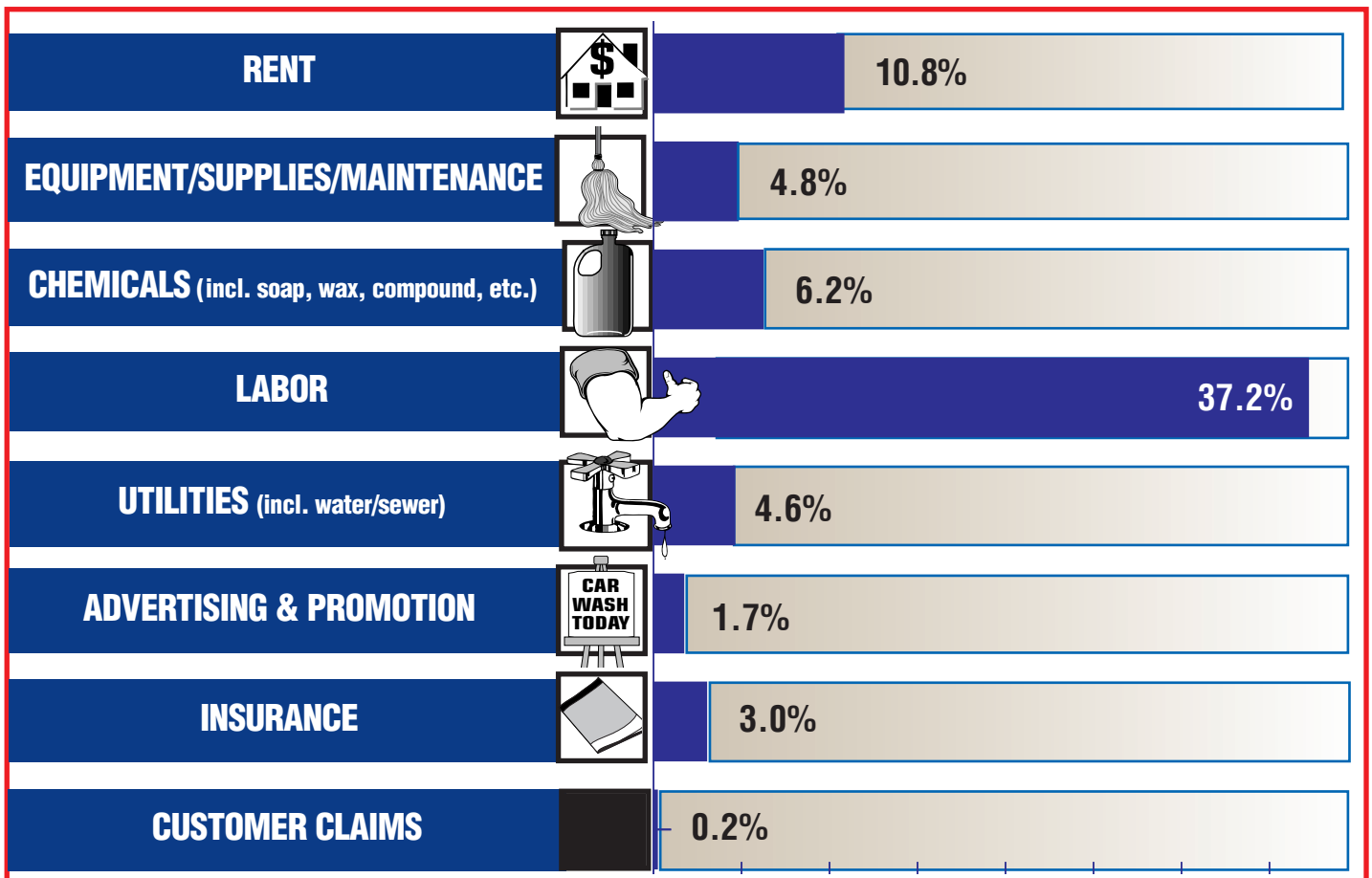
**CUSTOMER PROFILE**

**RETAIL VEHICLE PROFILE**

74% - Retail	23% - Auto Dealers
2% - Taxi/Limo	1% - Other (Fleets, Body Shops, Etc.)

16% - New (under 1 yr. old)	32% - 3-5 yrs. old
30% - 1-2 yrs. old	21% - 5+ yrs. old

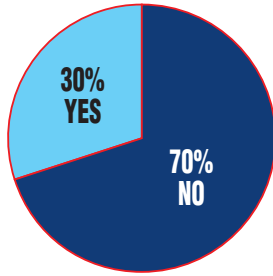
**OPERATING COSTS AS PERCENTAGE OF REVENUE**



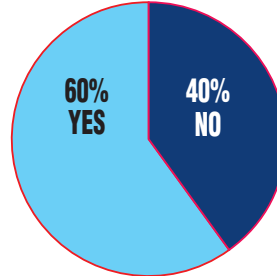
# SURVEY

## OFFER EXPRESS SERVICES

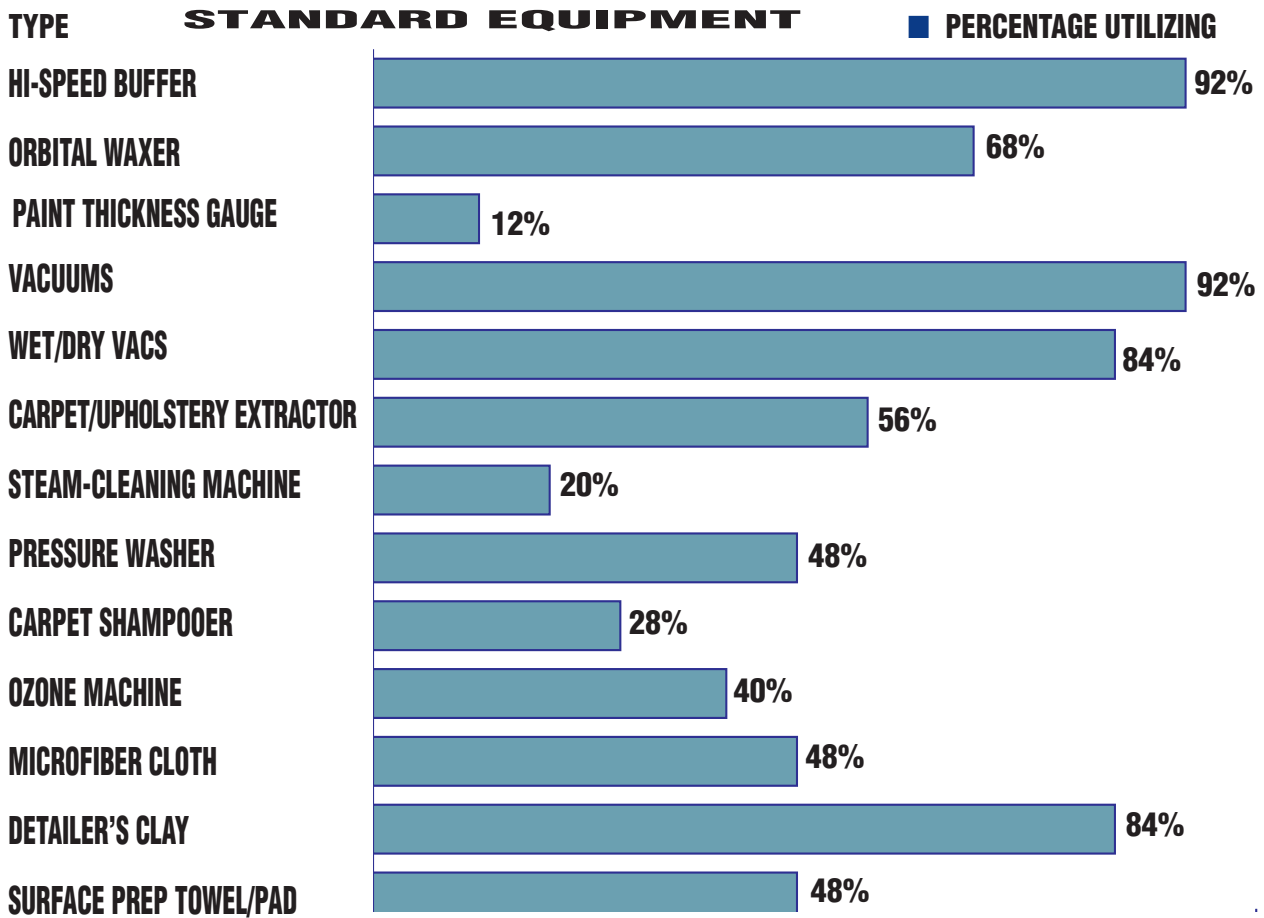
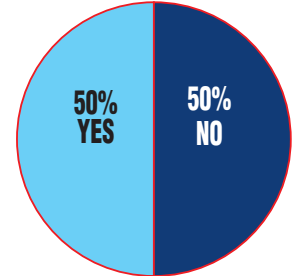
### FREESTANDING



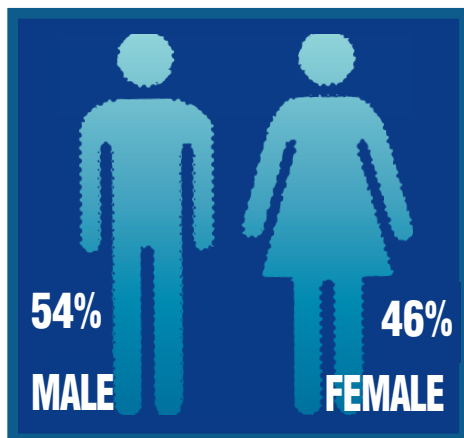
### CAR WASH COMBO



### MOBILE



## RETAIL CONSUMER PROFILE

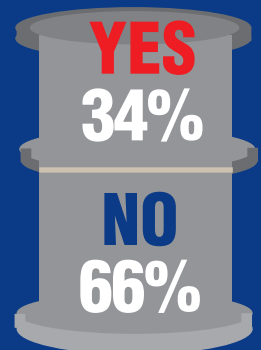


**AVERAGE MONTHLY GROSS INCOME (DETAIL SERVICES ONLY)**

**FREESTANDING \$16,419**



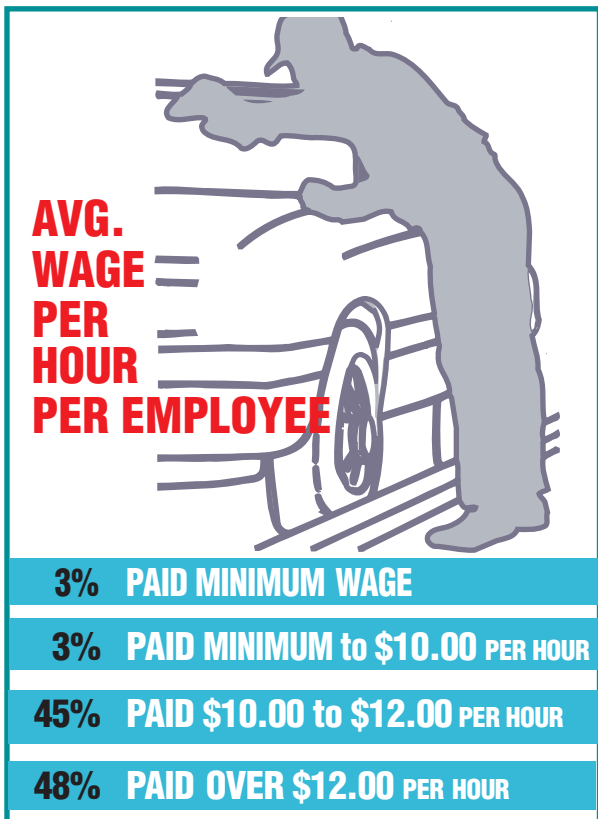
## EMPLOY CERTIFIED DETAILERS



## AVERAGE PACKAGE PRICES

<b>RETAIL</b>	<b>FREE-STANDING</b>	<b>CAR WASH COMBO</b>
<b>COMPLETE INTERIOR/EXTERIOR DETAIL</b>	<b>\$256.13</b>	<b>\$218.15</b>
<b>INTERIOR DETAIL ONLY</b>	<b>\$166.93</b>	<b>\$120.00</b>
<b>EXTERIOR DETAIL ONLY</b>	<b>\$149.87</b>	<b>\$120.00</b>
<b>WHOLESALE</b>		
<b>COMPLETE INTERIOR/EXTERIOR DETAIL</b>	<b>\$186.82</b>	<b>\$191.67</b>
<b>INTERIOR DETAIL ONLY</b>	<b>\$108.13</b>	<b>\$101.67</b>
<b>EXTERIOR DETAIL ONLY</b>	<b>\$121.43</b>	<b>\$101.67</b>

### LABOR COSTS



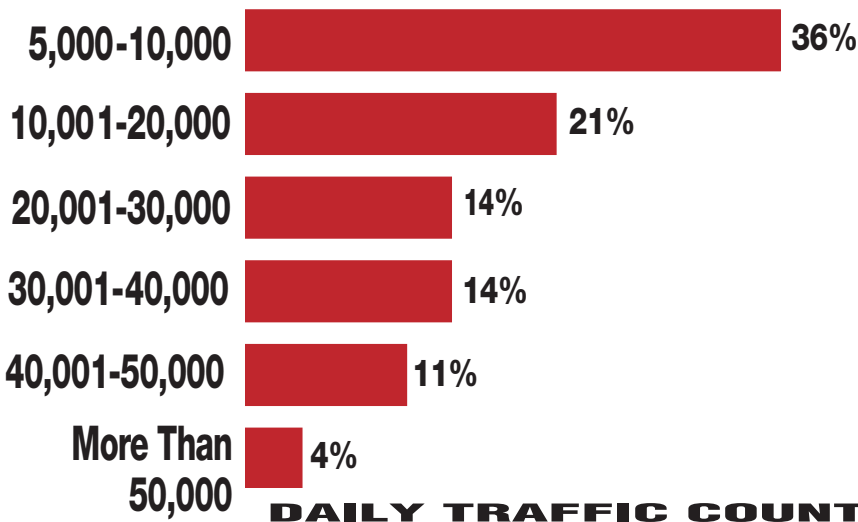
### PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

	FREE-STANDING	CAR WASH COMBO
MONDAY	17	15
TUESDAY	17	10
WEDNESDAY	17	16
THURSDAY	19	19
FRIDAY	21	23
SATURDAY	8	16
SUNDAY	1	1

**A LA CARTE SERVICES AT FREESTANDING SHOPS**

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE
HAND WAX	75%	\$86.45
MACHINE WAX/BUFF	55%	\$151.17
CARPET SHAMPOO	75%	\$67.45
UPHOLSTERY CLEANING	75%	\$74.33
LEATHER/VINYL (INT.) DRESSING	60%	\$30.00
VINYL/RUBBER (EXT.) DRESSING	45%	\$21.67
DEODORIZING	40%	\$65.00
PAINT TOUCH-UP	30%	\$38.33
PAINTLESS DENT REMOVAL	10%	\$70.00
WINDSHIELD REPAIR	5%	*
EXTENDED UPHOLSTERY PROT.	15%	*
EXTENDED PROT. PAINT SEALANT	30%	\$328.00
HEADLIGHT RESTORATION	50%	\$90.00
ENGINE CLEANING	55%	\$39.88
WINDOW TINTING	5%	\$200.00
PINSTRIPING	20%	\$70.00
CERAMIC COATING	20%	\$700.00

\* Too few responses



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

