

AutoLaundry^{news}

Results From The **2021** Auto Laundry News **Full/Flex Survey**

The 2021 *Auto Laundry News* Full/Flex Survey was conducted through a mailing of questionnaires to a random selection of our subscribers who own and operate conveyor car wash businesses other than exterior sites. The information presented in this report results from an analysis of data provided by respondents from locations throughout the United States.

Full-Service Sites vs. Flex-Service Sites

For purposes of comparison, survey responses from full-service sites are on occasion tabulated separately from flex-service responses. Full-service participants make up 76 percent of the total, with flex-service sites accounting for 24 percent. This compares to a 79/21 split last year and 82/18 the year before that.

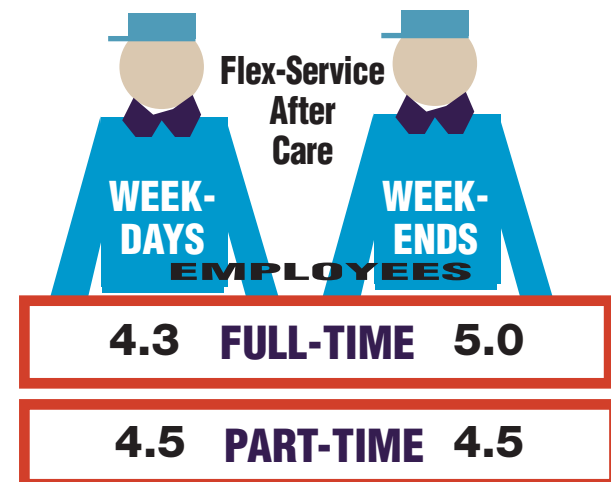
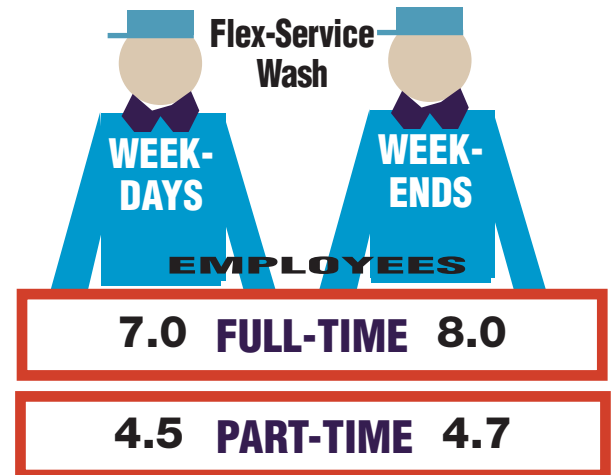
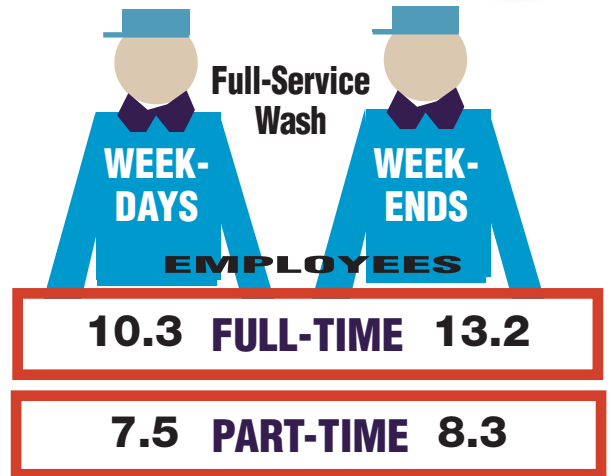
Respondents continue to self-identify as to whether they belong in the full-service or flex-service category. This year, flex-service respondents look far less like flex-service than they did in last year's survey. Currently, only 40 percent operate an after-care center on site. Last year that figure was 83 percent. Twenty percent report having self-serve wand bays on site — in last year's survey 50 percent did so.

In a complete and somewhat puzzling reversal of last year's survey results, 75 percent of flex-service respondents report vacuuming before the wash. That's a larger proportion than even the full-service sites, two thirds of which vacuum first then wash.

Revenues

Full- and flex-service car washes had a difficult time of it in 2020. Only 5 percent of respondents, overall, report increased income compared to the previous year. In last year's survey 40 percent were able to do so (the graphic on page 43 provides a five-year perspective). In the current survey, not a single flex-service participant reports improved revenue. Overall, 81 percent report declining income; 100 percent of flex-service sites do so.

COVID-19 squarely gets the blame for this reversal of fortune. Sixty-three percent of full-service sites and 20 percent of flex-service sites report closing due to COVID-19 restrictions — full-service sites for an average of seven weeks and flex-service sites for an average of three weeks. Half of full-service sites and 40 percent of flex-service sites converted temporarily to exterior-only washing in order to remain open or reopen. 📷



COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	14%
1	23%
2	32%
3	9%
4	9%
5	4%
MORE THAN 5	9%

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION

	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	13	11	11	13	17	21	15
Mountain Arizona-Colorado-Idaho-Montana-Nevada- New Mexico-Utah-Wyoming	12	12	14	15	18	20	9
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska- North Dakota-South Dakota	11	10	10	18	22	25	5
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	12	10	10	12	21	23	13
South Central Alabama-Arkansas-Kentucky-Louisiana- Mississippi-Oklahoma-Tennessee-Texas	12	10	10	12	17	27	12
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	13	14	11	11	21	20	10
Mid-Atlantic New Jersey-New York-Pennsylvania	10	8	15	15	13	20	20
New England Connecticut-Maine-Massachusetts- New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

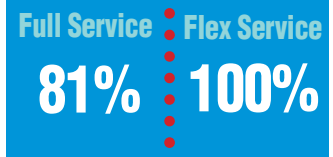
*NOTE: Some results total more than 100 due to rounding *Too few responses*

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

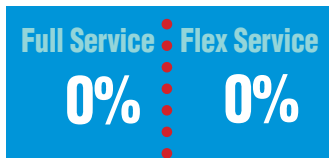
	WINTER	SPRING	SUMMER	FALL
Pacific	17	27	34	23
Mountain	25	15	45	15
Midwest	30	35	20	15
Central	35	26	20	19
South Central	22	23	35	20
Southeast	35	27	17	22
Mid-Atlantic	30	25	20	25
New England	*	*	*	*

*NOTE: Some results total more than 100 due to rounding *Too few responses*

OPEN SUNDAY



OPEN 24 HOURS



AVERAGE DAILY TRAFFIC COUNT

AVERAGE ANNUAL WASH VOLUME

Full Service

27,000

62,700

Flex Service

28,300

64,100

AVERAGE GROSS REVENUE PER CAR

(CAR WASH SALES ONLY)

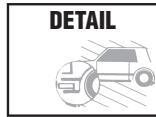


EXTRA SERVICES OFFERED

Average Price % Of Operators Offering Services



FULL	\$42.00		56%
FLEX	\$37.00		80%



FULL	\$200.00		94%
FLEX	\$226.00		80%



FULL	\$89.00		94%
FLEX	\$82.00		80%



FULL	\$44.00		38%
FLEX	\$37.00		40%



FULL	\$63.00		94%
FLEX	\$65.00		100%



FULL	\$58.00		44%
FLEX	\$70.00		40%



FULL	\$37.00		56%
FLEX	\$45.00		80%



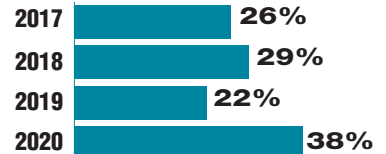
FULL	\$73.00		94%
FLEX	\$70.00		100%



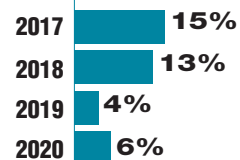
FULL	\$120.00		75%
FLEX	\$130.00		80%

EXTRA ON-LINE SERVICES SOLD

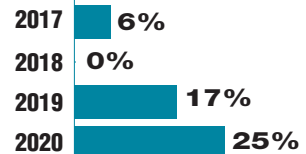
10% TO 20% OF CARS WASHED



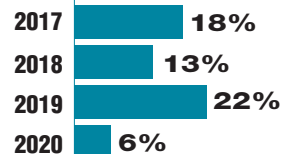
21% TO 30% OF CARS WASHED



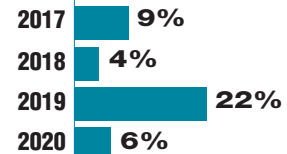
31% TO 40% OF CARS WASHED



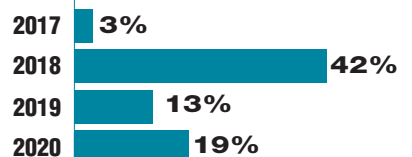
41% TO 50% OF CARS WASHED



51% TO 60% OF CARS WASHED

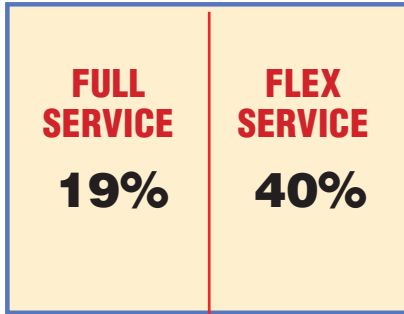


OVER 60% OF CARS WASHED

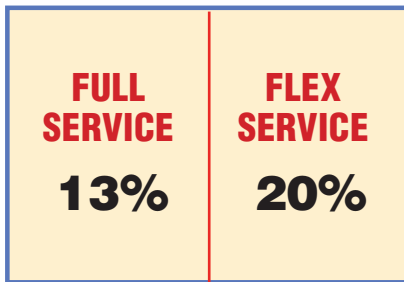


SURVEY

OPERATE FREESTANDING AFTER-CARE CENTER



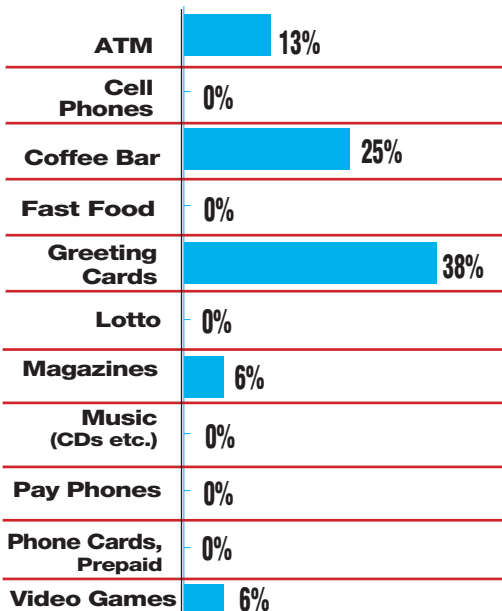
OPERATE COIN-OP BAYS ON SITE



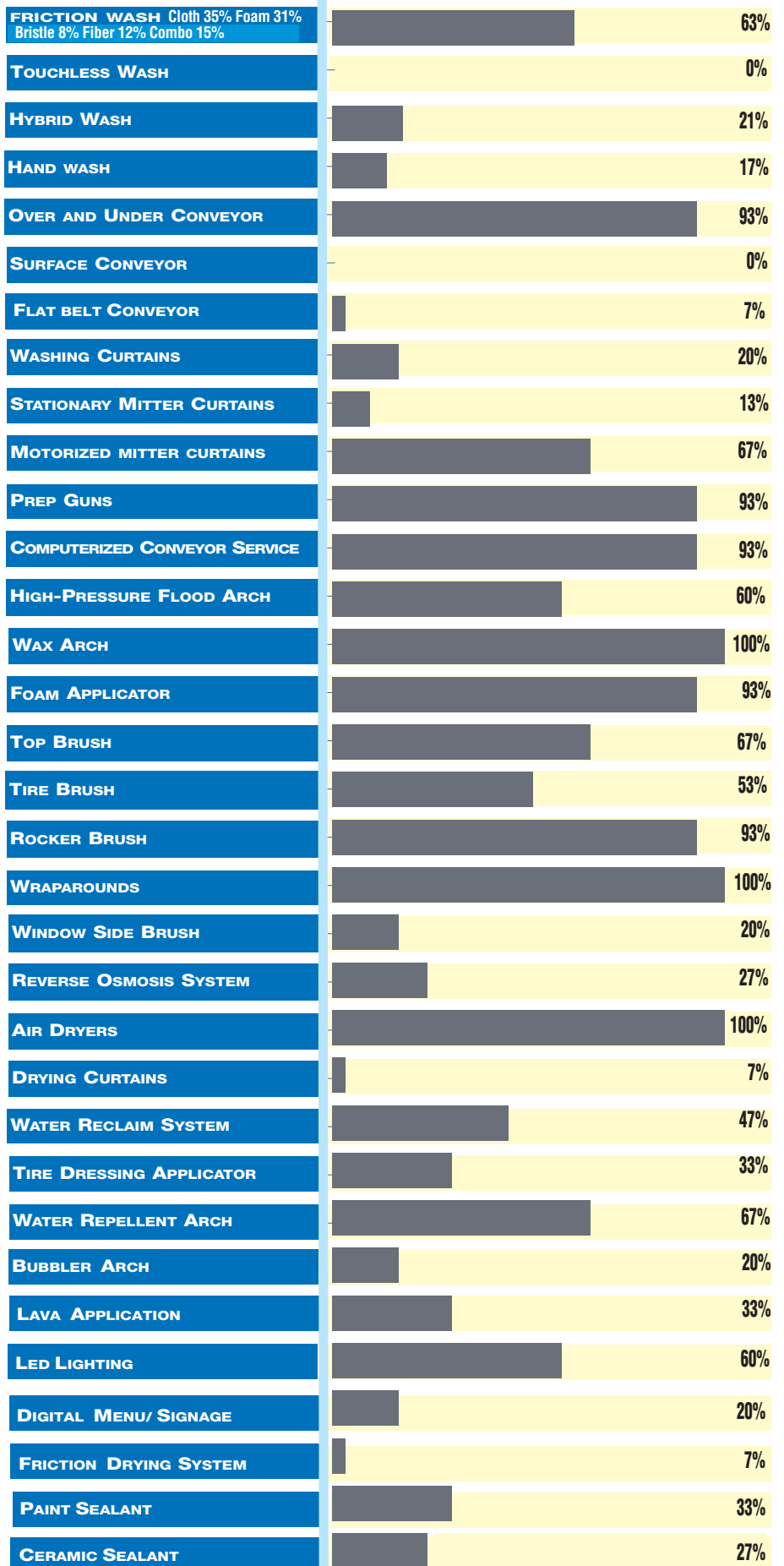
AVERAGE NUMBER OF BAYS



NON-AUTO PROFIT CENTERS ON SITE

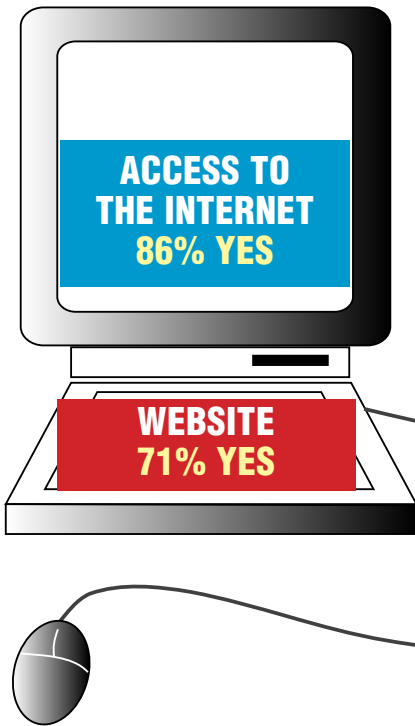
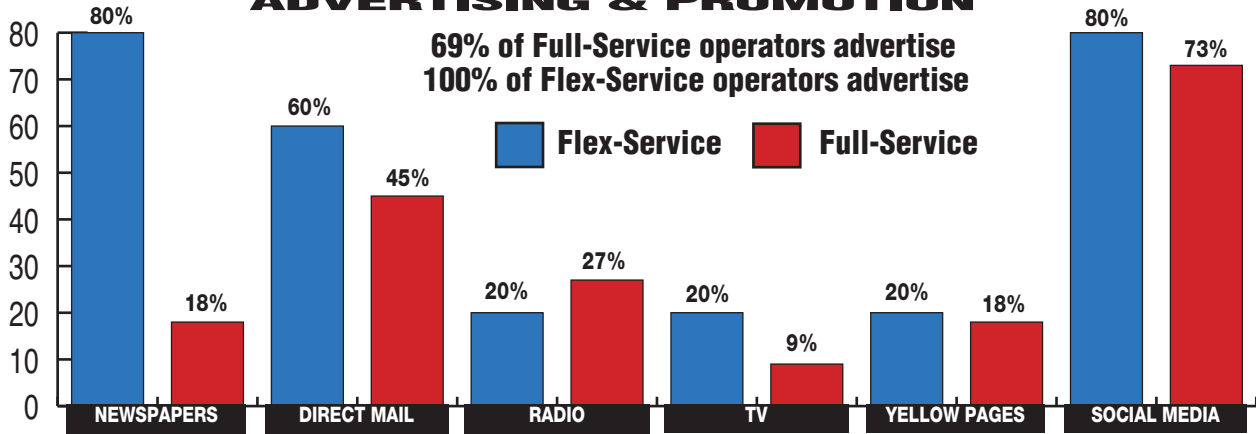


PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

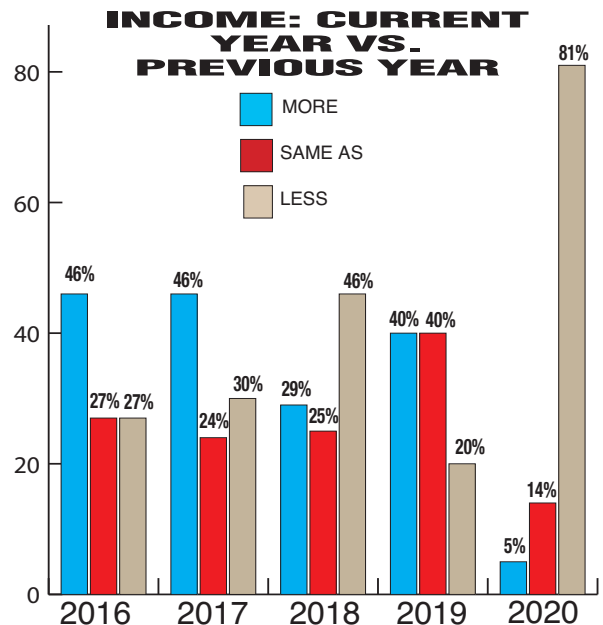
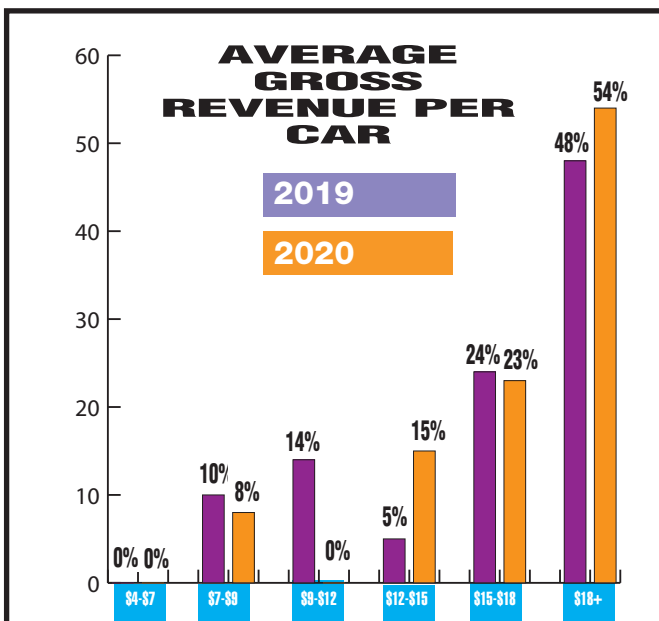
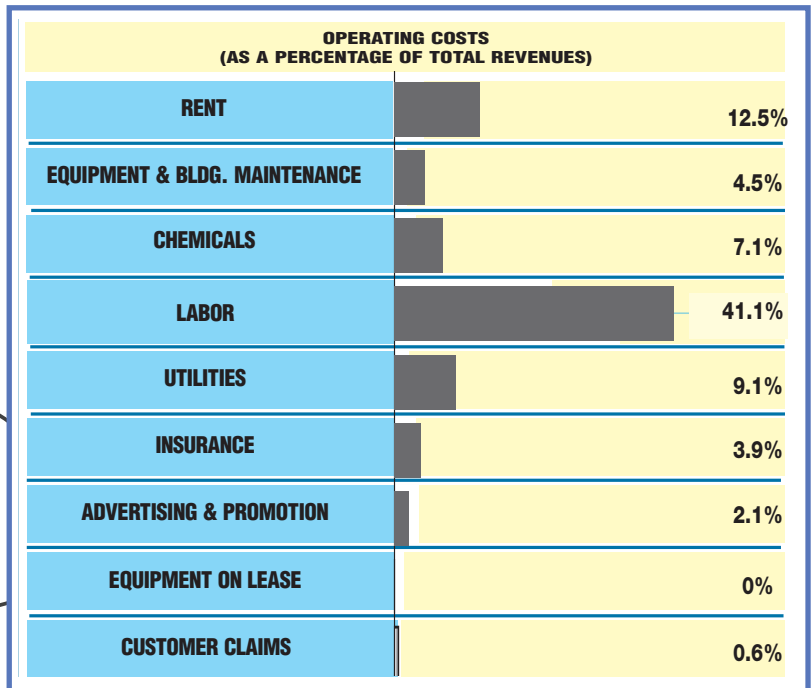


ADVERTISING & PROMOTION

69% of Full-Service operators advertise
100% of Flex-Service operators advertise



OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)



SURVEY

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

