

AutoLaundry^{news}

Results From The **2022** Auto Laundry News **Full/Flex Survey**

The 2022 *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 79 percent of the total, with flex-service sites accounting for 21 percent. This compares to a 76/24 split last year and 79/21 the year before that.

Respondents continue to self-identify as to whether they belong in the full-service or flex-service category, and the results are sometimes puzzling: only half of flex-service respondents report operating an after-care center on site, though this is a step forward from the 40 percent who did so last year. The year before that, 83 percent reported operating such a center — much closer to the figure one might expect. Twenty-five percent report having self-serve wand bays on site — in last year’s survey 20 percent did so.

That fully 60 percent of flex-service respondents report vacuuming before the wash is another headscratcher but, unlike last year, it’s at least a smaller proportion than the 80 percent of full-service respondents who report doing the same.

Revenues

Overall, 67 percent of survey respondents report increased income compared to the previous year. This is quite a turnaround from last year’s survey when only 5 percent of participants were able to do so (the graphic on page 41 provides a five-year perspective). Flex-service sites, particularly, experienced a remarkable reversal of fortune: while last year 100 percent of respondents in this category reported declining revenues, this year 100 percent report income growth. On the full-service side, 57 percent of respondents report improved income while the rest is evenly split between income declining and holding steady.

Much of this volatility can be ascribed to COVID-19, its impact on car washing having diminished substantially during 2021. Compared to 63 percent of full-service sites and 20 percent of flex-service sites reporting closures due to COVID-19 restrictions in last year’s survey, only 40 percent of the former and none of the latter report such closures in this year’s survey. 📺



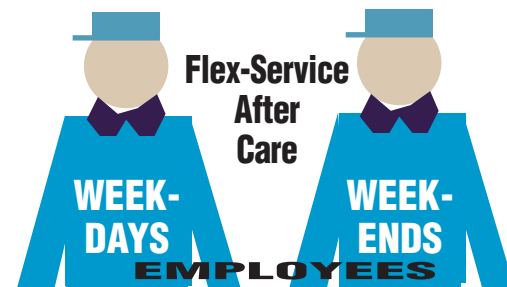
11.4 FULL-TIME 12.6

4.0 PART-TIME 4.9



3.7 FULL-TIME 3.7

4.0 PART-TIME 4.0



3.4 FULL-TIME 3.7

3.3 PART-TIME 3.8

COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	11%
1	0%
2	16%
3	16%
4	11%
5	21%
MORE THAN 5	26%

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION

	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	11	11	11	11	19	20	17
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	11	12	14	15	19	22	8
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	11	11	11	14	22	25	7
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	10	11	11	20	25	12
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	13	10	10	13	19	24	13
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	13	13	10	18	18	23	7
Mid-Atlantic New Jersey-New York-Pennsylvania	7	15	13	15	16	26	9
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

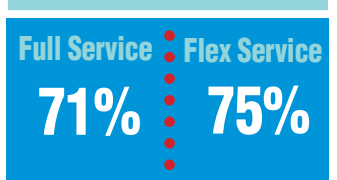
NOTE: Some results total more than 100 due to rounding *Too few responses

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

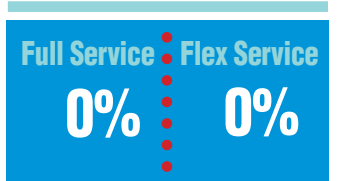
	WINTER	SPRING	SUMMER	FALL
Pacific	20	27	33	20
Mountain	33	23	30	15
Midwest	35	27	23	16
Central	47	20	18	16
South Central	24	29	27	21
Southeast	26	30	19	25
Mid-Atlantic	35	26	18	21
New England	*	*	*	*

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

34,500

58,600

Flex Service

25,000

40,000

AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

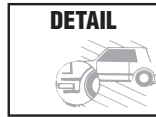


EXTRA SERVICES OFFERED

Average Price % Of Operators Offering Services



FULL	\$54.17		91%
FLEX			0%





FULL	\$165.83		91%
FLEX	\$230.00		100%



FULL	\$68.33		91%
FLEX	\$86.67		100%




FULL	\$50.00		9%
FLEX	\$50.00		67%



FULL	\$55.83		91%
FLEX	\$83.33		100%



FULL	\$35.00		82%
FLEX			0%



FULL	\$30.00		73%
FLEX	\$45.00		67%



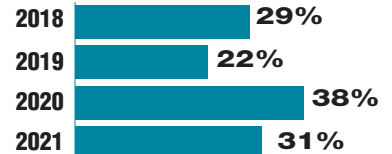
FULL	\$72.33		91%
FLEX	\$105.00		100%



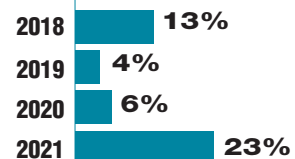
FULL	\$105.67		91%
FLEX	\$200.00		67%

EXTRA ON-LINE SERVICES SOLD

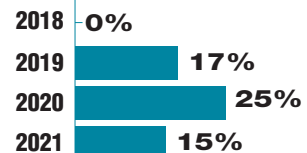
10% TO 20% OF CARS WASHED



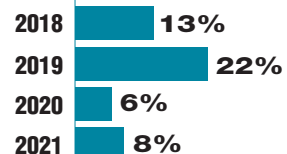
21% TO 30% OF CARS WASHED



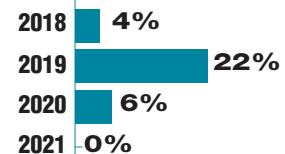
31% TO 40% OF CARS WASHED



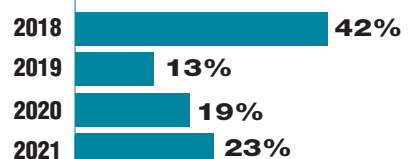
41% TO 50% OF CARS WASHED



51% TO 60% OF CARS WASHED

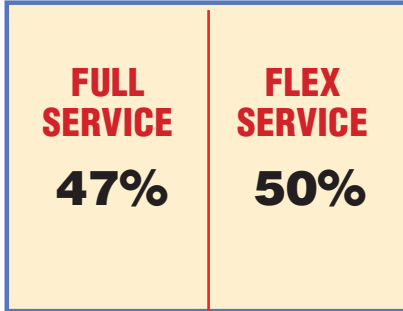


OVER 60% OF CARS WASHED

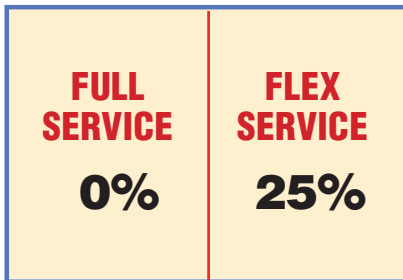


SURVEY

OPERATE FREESTANDING AFTER-CARE CENTER



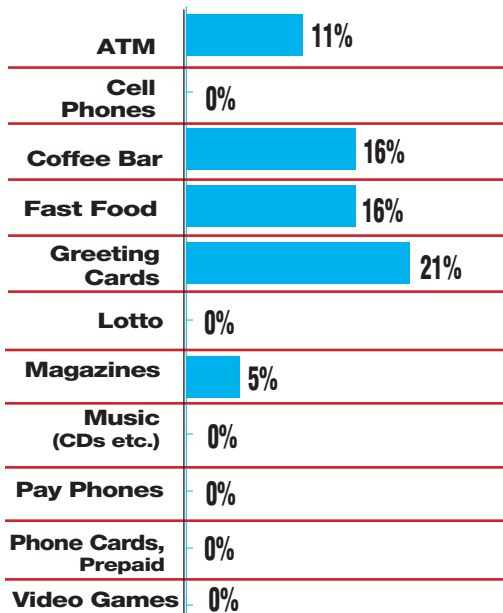
OPERATE COIN-OP BAYS ON SITE



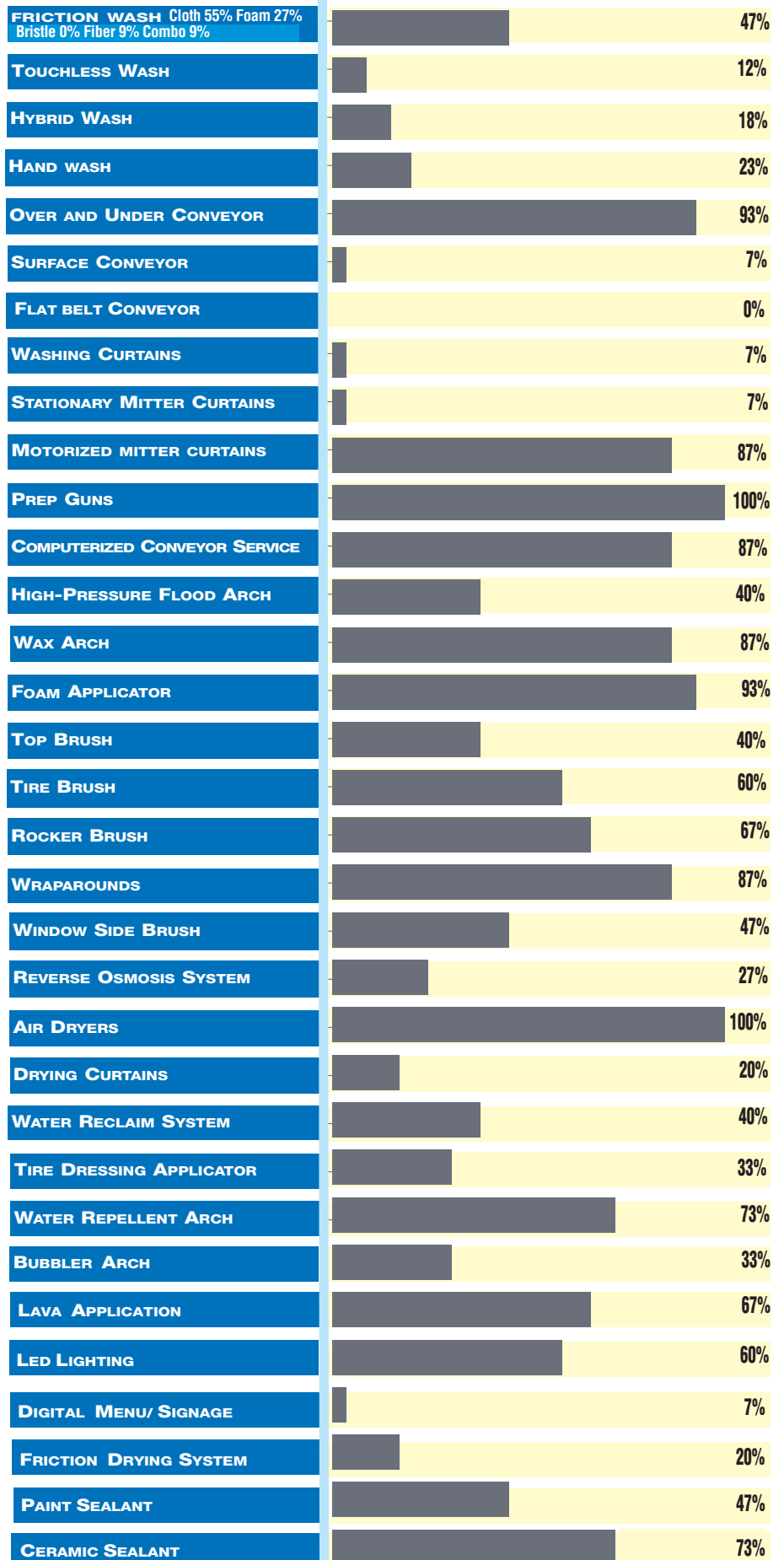
AVERAGE NUMBER OF BAYS



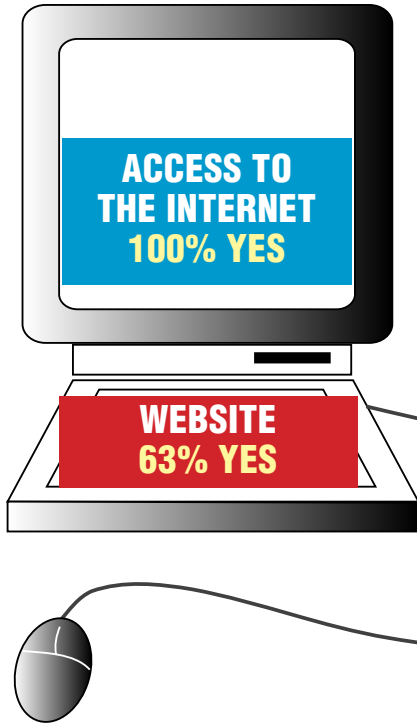
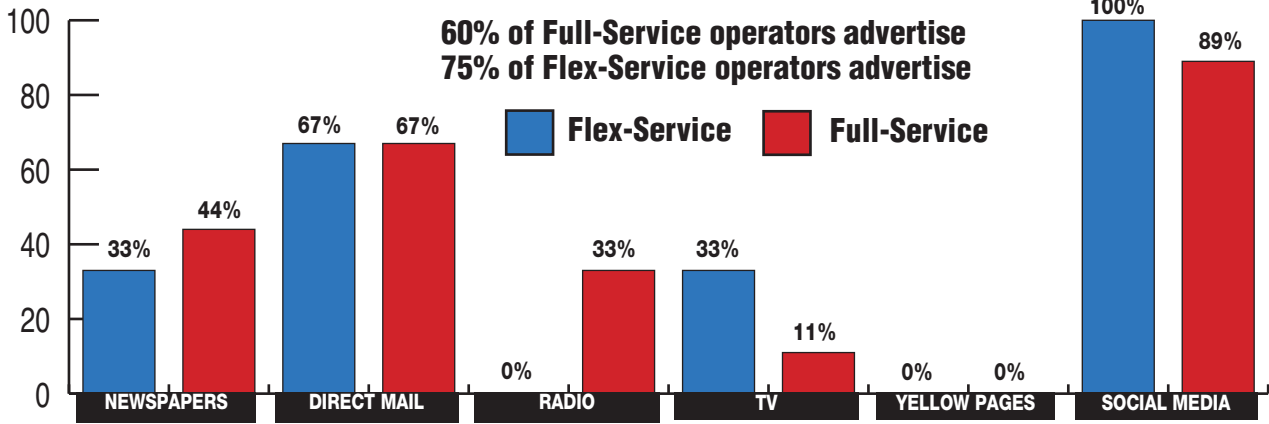
NON-AUTO PROFIT CENTERS ON SITE



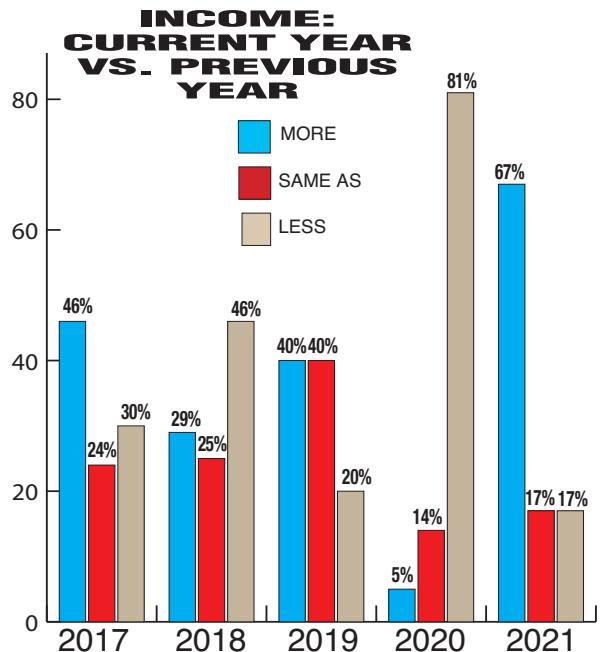
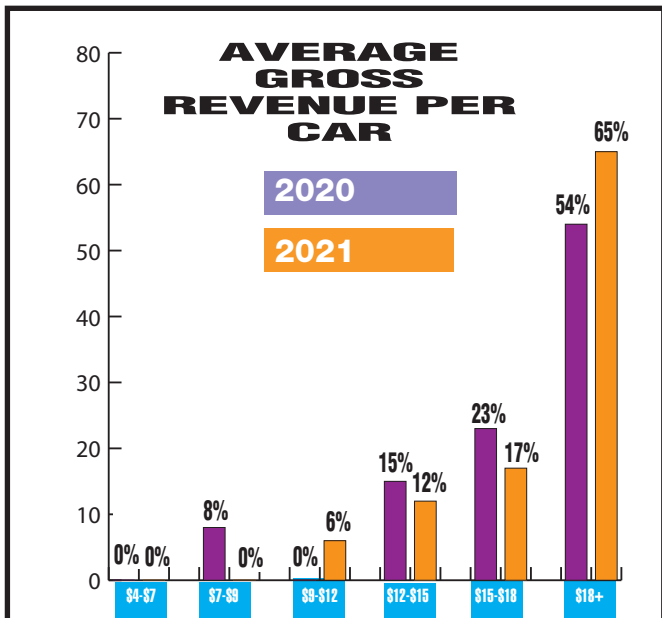
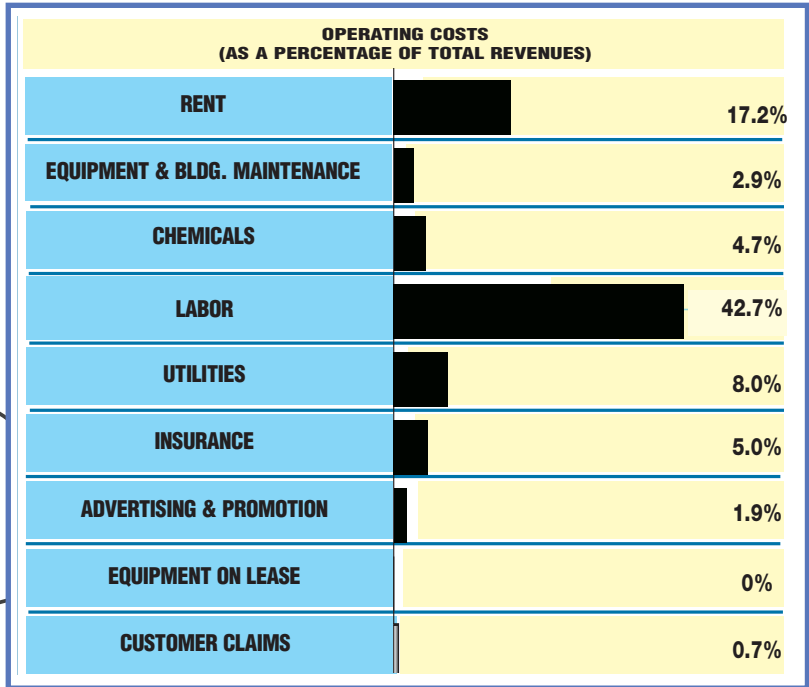
PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



ADVERTISING & PROMOTION



OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)



SURVEY

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

