

AutoLaundry^{news}

THE VOICE OF THE CAR CARE INDUSTRY

Results from the Auto Laundry News

2023

Detailing Survey

www.carwashmag.com

Results From The *Auto Laundry News*

2023 Detail Survey

The 2023 *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. A three-year perspective of the category breakdown appears in the following table:

Detailer Type	2023	2022	2021
Freestanding	50%	58%	52%
Car Wash Combo	32%	26%	28%
Mobile Services	14%	0%	16%
Other Combo	4%	16%	4%

RESPONDENT POOL PROFILE

For comparative purposes, respondents are,

PERFORMANCE

Overall, 58 percent of respondents report improvement in their business year-to-year. This is a step up from the previous survey when 53 percent reported the same. It is also the second time in the past five years that a majority, overall, experienced gains. Half of Freestanding shops and two thirds of both Car Wash Combos and Mobile Services made progress. Overall, 16 percent of respondents report declining business, also a step up from the 12 percent who did so last year. In this regard, Mobile Services fared the best, with zero respondents reporting reversals. Car Wash Combos had it worst off: 33 percent of respondents report decreasing business.

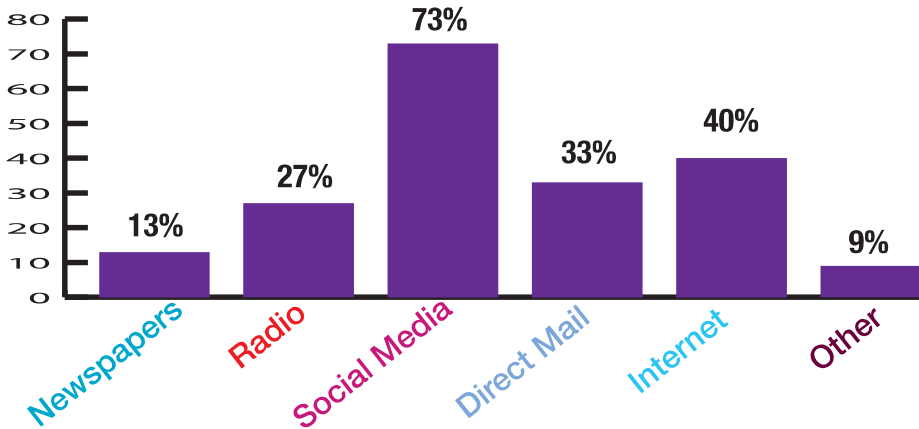
PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON

	WINTER	SPRING	SUMMER	FALL
FREE-STANDING	19	26	30	25
CAR WASH COMBO	22	33	25	20
MOBILE	15	32	30	23

INFLATION

Detailers have not escaped the impact of inflation. Overall, 71 percent of respondents have increased their prices as a result. At 82 percent, Freestanding shops were most likely to up their prices, though by a smaller percentage (10.8 percent) than the other categories. Car Wash Combos had the smallest proportion of participants opting for higher prices: 57 percent at an average increase of 12.5 percent. Two thirds of Mobile Services implemented price hikes averaging 20 percent.

**ADVERTISING & PROMOTION
71% ADVERTISE**

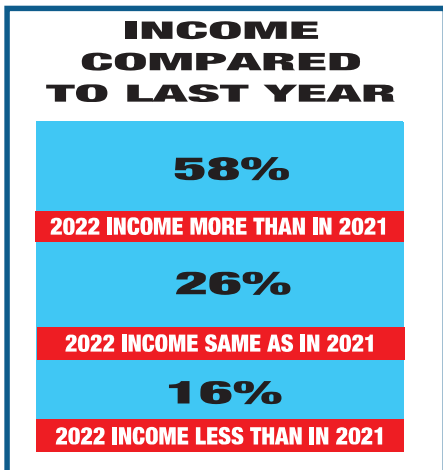


CERTIFICATION

The percentage of respondents who report employing certified detailers shows noteworthy growth: 41 percent in the current survey compared to 26 percent last year. For the first time, those certified by the International Detailing Association account for the majority of certified detailers.

OPERATOR PROFILE

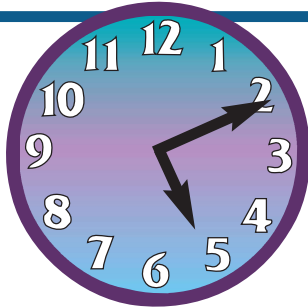
Freestanding Detail Shop	50%
Mobile Detailing	14%
Full-Service Conveyor Car Wash	23%
Exterior-Only Car Wash	5%
Self-Serve Car Wash	9%
In-Bay Automatic	5%
Oil Change/Lube	5%
Gas Station	9%
Other	18%



SURVEY

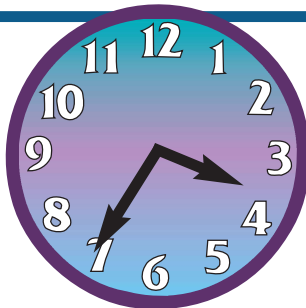
AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE

FREESTANDING



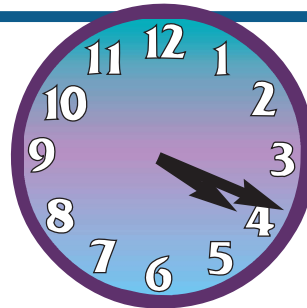
5.2 HOURS

CAR WASH COMBO



3.6 HOURS

MOBILE



4.3 HOURS

DETAIL SERVICE PRICES

CHARGE FROM A FIXED-PRICE MENU

45%

CHARGE ACCORDING TO PER-CAR ESTIMATE

45%

USE BOTH METHODS

10%

AVERAGE NUMBER OF CARS DETAILED ANNUALLY

2 0 2 2



FREESTANDING

1,052

EMPLOYEE UNIFORMS

FULL 20%

PARTIAL 60%

NONE 20%

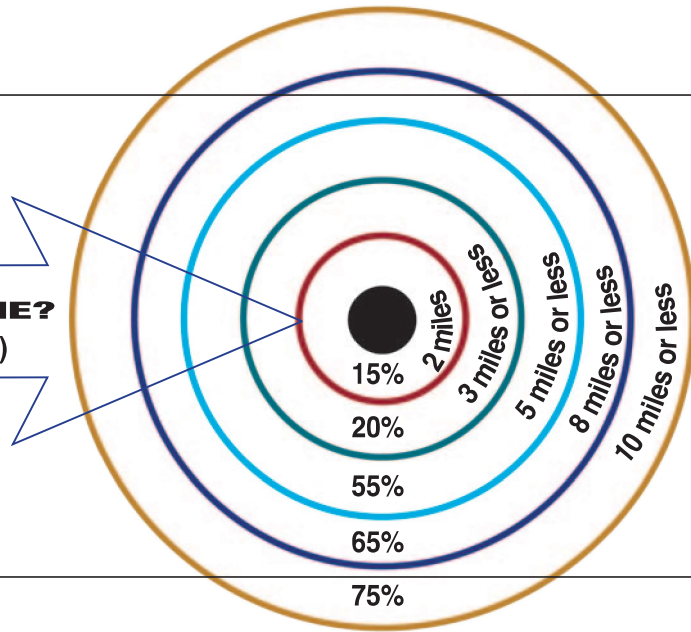
COMPETING DETAIL SHOPS IN AREA

NUMBER OF COMPETITORS

OPERATORS REPORTING

0		5%
1		26%
2		5%
3		16%
4		16%
5		21%
MORE THAN 5		11%

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











CUSTOMER PROFILE

83% – Retail	7% – Auto Dealers
1% – Taxi/Limo	9% – Other <small>(Fleets, Body Shops, Etc.)</small>

RETAIL VEHICLE PROFILE

23% – New (under 1 yr. old)	30% – 3-5 yrs. old
22% – 1-2 yrs. old	25% – 5+ yrs. old

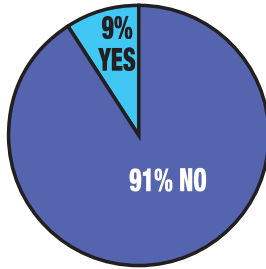
OPERATING COSTS AS PERCENTAGE OF REVENUE

RENT		15.7%
EQUIPMENT/SUPPLIES/MAINTENANCE		6.0%
CHEMICALS (incl. soap, wax, compound, etc.)		5.8%
LABOR		38.5%
UTILITIES (incl. water/sewer)		6.0%
ADVERTISING & PROMOTION		3.5%
INSURANCE		5.0%
CUSTOMER CLAIMS		0.1%

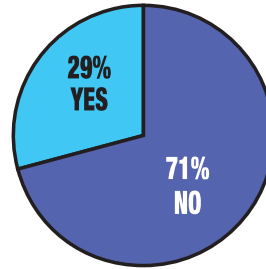
SURVEY

OFFER EXPRESS SERVICES

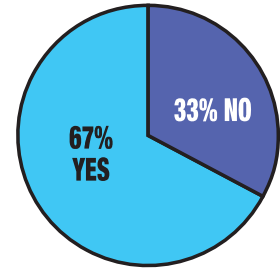
FREESTANDING



CAR WASH COMBO

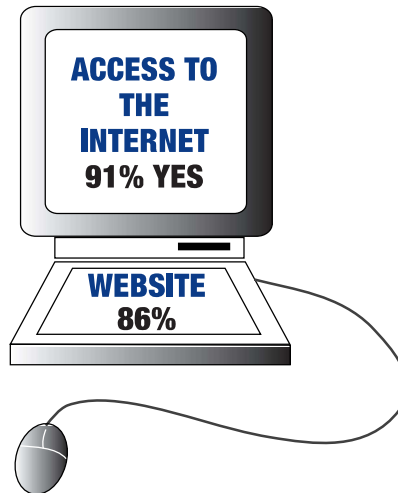


MOBILE

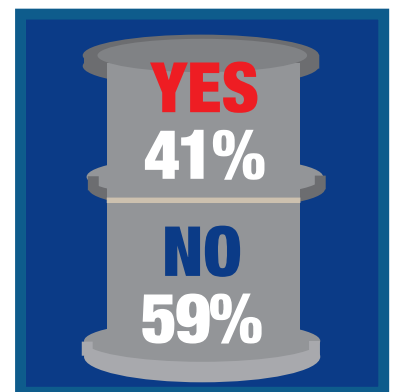


TYPE	STANDARD EQUIPMENT	PERCENTAGE UTILIZING
HI-SPEED BUFFER		88%
ORBITAL WAXER		88%
PAINT THICKNESS GAUGE		47%
VACUUMS		94%
WET/DRY VACS		94%
CARPET/UPHOLSTERY EXTRACTOR		82%
STEAM-CLEANING MACHINE		71%
PRESSURE WASHER		88%
CARPET SHAMPOOER		53%
OZONE MACHINE		59%
MICROFIBER CLOTH		100%
DETAILER'S CLAY		100%
SURFACE PREP TOWEL/PAD		76%

RETAIL CONSUMER PROFILE




EMPLOY CERTIFIED DETAILERS



AVERAGE PACKAGE PRICES

RETAIL	FREE- STANDING	CAR WASH COMBO
COMPLETE INTERIOR/EXTERIOR DETAIL	\$331.75	\$275.00
INTERIOR DETAIL ONLY	\$204.25	\$150.00
EXTERIOR DETAIL ONLY	\$231.13	\$147.00
WHOLESALE		
COMPLETE INTERIOR/EXTERIOR DETAIL	\$282.50	\$270.00
INTERIOR DETAIL ONLY	\$135.00	\$165.00
EXTERIOR DETAIL ONLY	\$208.00	\$165.00

LABOR COSTS



AVG.
WAGE
PER
HOUR

20%	PAID MINIMUM WAGE to \$12.00 PER HOUR
30%	PAID \$12.00 to \$15.00 PER HOUR
35%	PAID \$15.00 to \$18.00 PER HOUR
15%	PAID OVER \$18.00 PER HOUR

PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

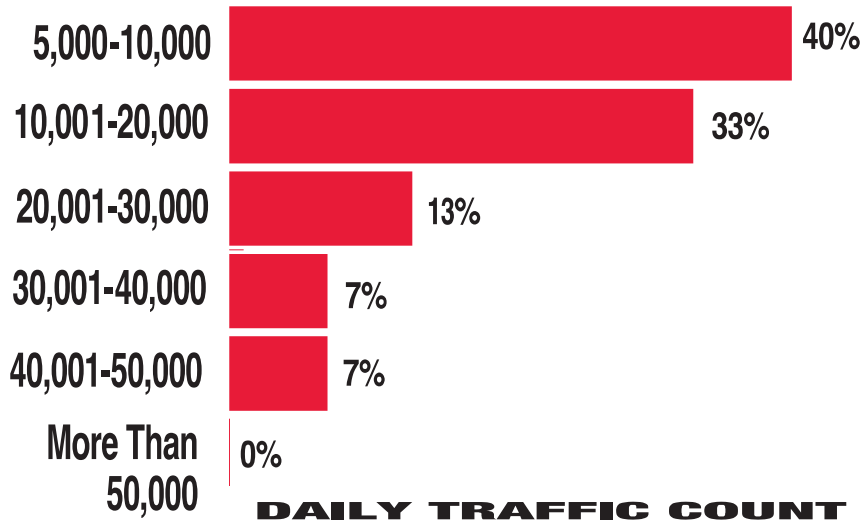
	FREE- STANDING	CAR WASH COMBO
MONDAY	17	15
TUESDAY	19	13
WEDNESDAY	18	13
THURSDAY	19	17
FRIDAY	21	20
SATURDAY	6	17
SUNDAY	1	5

SURVEY

A LA CARTE SERVICES AT FREESTANDING SHOPS

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE
HAND WAX	63%	\$118.33
MACHINE WAX/BUFF	50%	\$207.50
CARPET SHAMPOO	50%	\$85.00
UPHOLSTERY CLEANING	50%	\$85.00
LEATHER/VINYL (INT.) DRESSING	38%	\$45.00
VINYL/RUBBER (EXT.) DRESSING	38%	\$27.50
DEODORIZING	50%	\$125.00
PAINT TOUCH-UP	38%	*
PAINTLESS DENT REMOVAL	13%	*
WINDSHIELD REPAIR	38%	\$25.00
EXTENDED UPHOLSTERY PROT.	50%	\$85.00
EXTENDED PROT. PAINT SEALANT	50%	\$345.00
HEADLIGHT RESTORATION	63%	\$36.87
ENGINE CLEANING	63%	\$40.00
WINDOW TINTING	25%	*
INTERIOR SANITIZING	38%	\$100.00
CERAMIC COATING	87%	\$662.50

* Too few responses



AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

