

# AutoLaundry<sup>news</sup>

THE VOICE OF THE CAR CARE INDUSTRY

Results from the  
Auto Laundry News

**2023**

**Full/Flex Survey**

# Full/Flex Survey

**T**he 2023 *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 75 percent of the total, with flex-service sites accounting for 25 percent. This compares to a 79/21 split last year and 76/24 the year before that.

Respondents continue to self-identify as to whether they belong in the full-service or flex-service category. The results bring no more clarity to the distinction than have several previous surveys. For example, only 25 percent of flex-service respondents report operating an after-care center on site; the same proportion of full-service survey participants report doing so. In a perfect world, every flex-service wash would have an after-care center.

In last year's survey, 60 percent of flex-service respondents reported vacuuming before the wash. In the current survey, 100 percent of participants in this category report vacuuming after the wash. Forty-two percent of full-service respondents report doing the same.

### Revenues

Overall, 38 percent of survey respondents report increased income compared to the previous year. This is a few steps down from last year's survey when 67 percent of participants were able to do so (the graphic on page 39 provides a six-year perspective). Flex-service sites, particularly, have extended their remarkable performance: 75 percent experienced increased income averaging 12.5 percent compared to the previous year. Only a quarter of their full-service counterparts report the same with an average increase of 13.3 percent, while fully a third experienced declining revenues averaging 12.3 percent. Not a single flex-service site saw less revenue.

### Inflation

Inflation touches everything, including car washing. Sixty-seven percent of full-service respondents increased their prices an average of 11.5 percent in 2022 because of inflation. On the flex-service side, respondents were slower to make adjustments: only a quarter upped their prices an average 10 percent in 2022.

As pervasive and obstructive as inflation, supply-chain disruptions also affect the car wash industry with two thirds of full-service respondents and 75 percent of flex-service respondents report being negatively impacted. 🚗



### COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	7%
1	20%
2	13%
3	27%
4	20%
5	7%
MORE THAN 5	7%

**PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION**

	MON	TUES	WED	THURS	FRI	SAT	SUN
<b>Pacific</b> Alaska-California-Hawaii-Oregon-Washington	11	11	11	11	19	20	17
<b>Mountain</b> Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	12	12	14	15	18	21	9
<b>Midwest</b> Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	*	*	*	*	*	*	*
<b>Central</b> Illinois-Indiana-Michigan-Ohio-Wisconsin	11	10	11	12	21	24	13
<b>South Central</b> Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	14	13	13	14	19	29	6
<b>Southeast</b> Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	12	13	13	13	17	18	14
<b>Mid-Atlantic</b> New Jersey-New York-Pennsylvania	14	9	9	14	16	26	12
<b>New England</b> Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	8	7	16	18	18	24	9

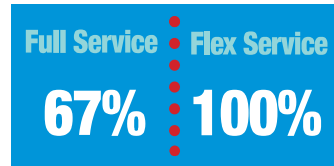
*NOTE: Some results total more than 100 due to rounding \*Too few responses*

**PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION**

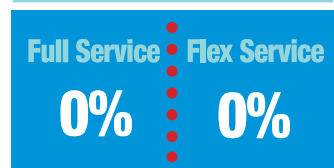
	WINTER	SPRING	SUMMER	FALL
<b>Pacific</b>	17	28	34	21
<b>Mountain</b>	32	19	35	15
<b>Midwest</b>	*	*	*	*
<b>Central</b>	41	23	18	18
<b>South Central</b>	22	26	32	22
<b>Southeast</b>	29	27	20	25
<b>Mid-Atlantic</b>	32	23	22	23
<b>New England</b>	45	28	16	11

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

**OPEN SUNDAY**



**OPEN 24 HOURS**




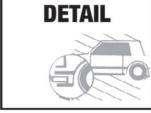

























**AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)**

	AVERAGE DAILY TRAFFIC	AVERAGE ANNUAL WASH
<b>Full Service</b>	<b>37,100</b>	<b>75,200</b>
<b>Flex Service</b>	<b>32,500</b>	<b>73,000</b>

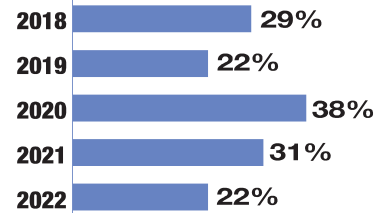


## EXTRA SERVICES OFFERED

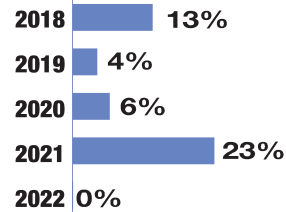
	Average Price		% Of Operators Offering Services	
 <b>INTERIOR SANITIZING</b>	<b>FULL</b>	<b>\$49.83</b>		58%
	<b>FLEX</b>			0%
 <b>DETAIL</b>	<b>FULL</b>	<b>\$172.85</b>		67%
	<b>FLEX</b>	<b>\$212.50</b>		100%
 <b>UPHOLSTERY CLEANING</b>	<b>FULL</b>	<b>\$72.99</b>		50%
	<b>FLEX</b>	<b>\$65.00</b>		25%
 <b>QUICK LUBE</b>	<b>FULL</b>	<b>\$50.00</b>		9%
	<b>FLEX</b>			0%
 <b>CARPET SHAMPOO</b>	<b>FULL</b>	<b>\$64.33</b>		58%
	<b>FLEX</b>	<b>\$65.00</b>		25%
 <b>EXTERIOR VINYL PROTECTANT</b>	<b>FULL</b>	<b>\$24.00</b>		42%
	<b>FLEX</b>	<b>\$7.50</b>		50%
 <b>INTERIOR VINYL PROTECTANT</b>	<b>FULL</b>	<b>\$32.00</b>		42%
	<b>FLEX</b>	<b>\$15.00</b>		25%
 <b>WAX AND HAND BUFF</b>	<b>FULL</b>	<b>\$67.49</b>		75%
	<b>FLEX</b>	<b>\$92.50</b>		50%
 <b>WAX AND MACHINE BUFF</b>	<b>FULL</b>	<b>\$111.99</b>		50%
	<b>FLEX</b>	<b>\$107.50</b>		50%

## EXTRA ON-LINE SERVICES SOLD

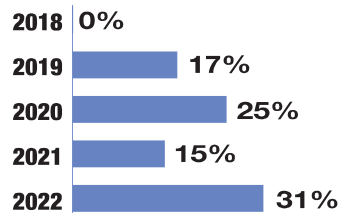
### 10% TO 20% OF CARS WASHED



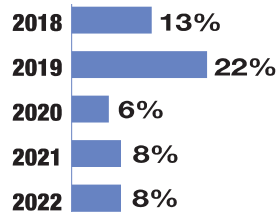
### 21% TO 30% OF CARS WASHED



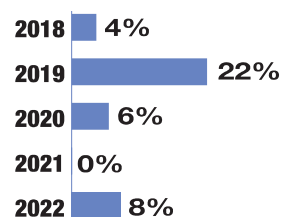
### 31% TO 40% OF CARS WASHED



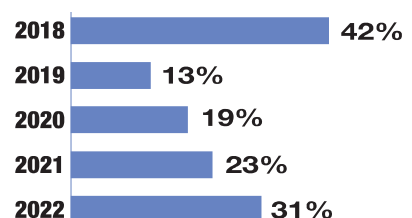
### 41% TO 50% OF CARS WASHED



### 51% TO 60% OF CARS WASHED

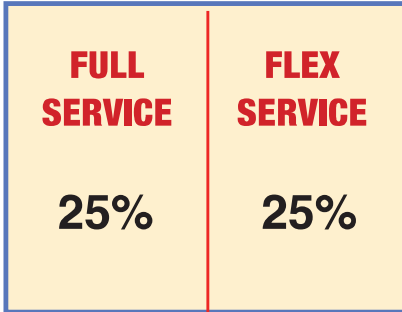


### OVER 60% OF CARS WASHED

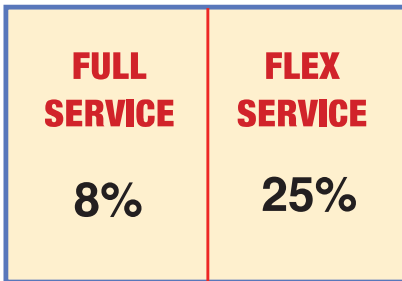


## SURVEY

### OPERATE FREESTANDING AFTER-CARE CENTER



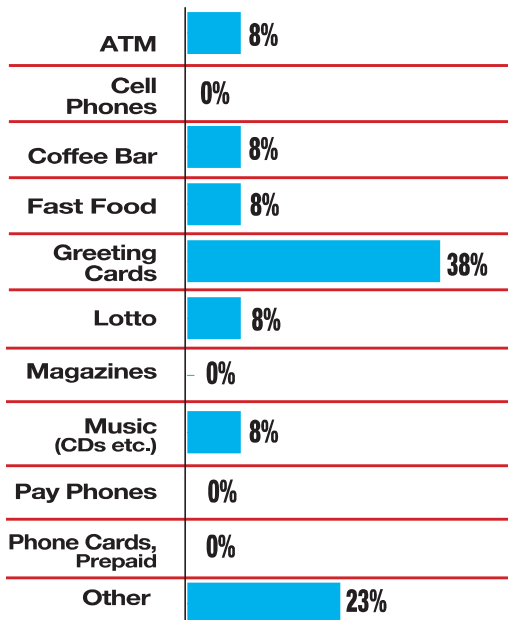
### OPERATE COIN-OP BAYS ON SITE



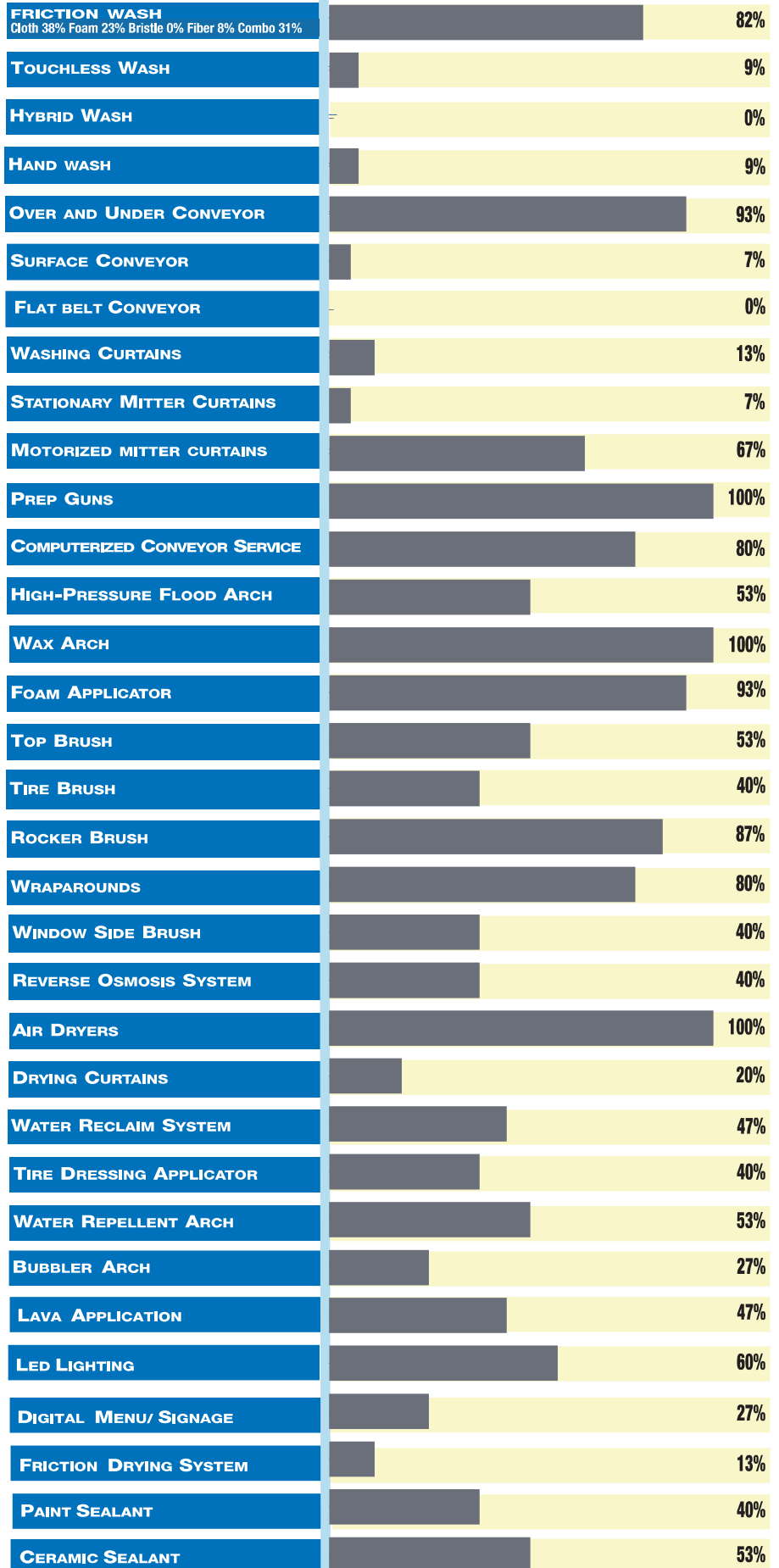
### AVERAGE NUMBER OF BAYS



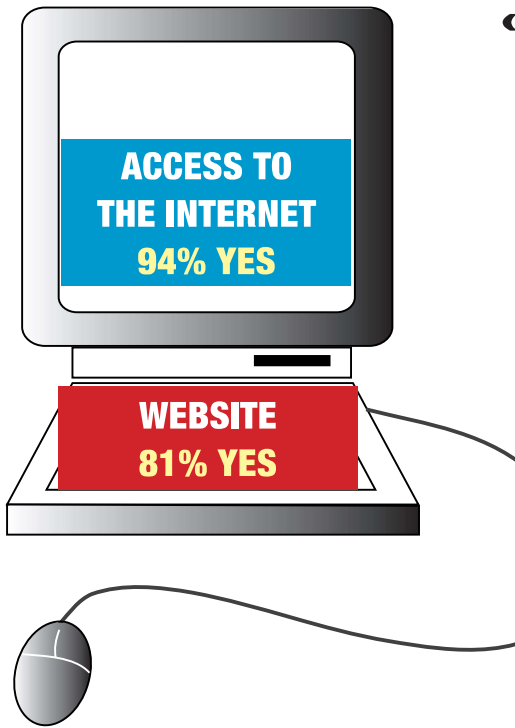
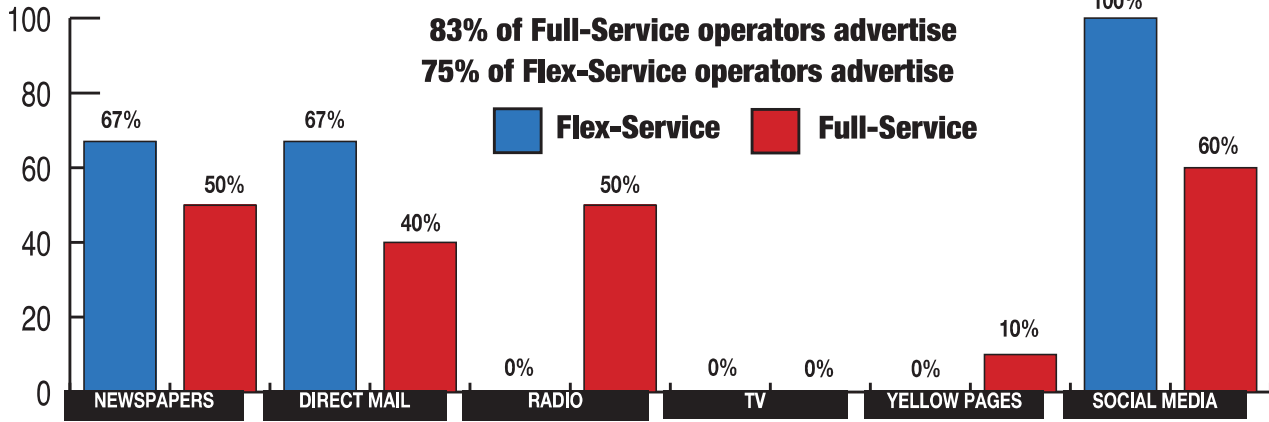
### NON-AUTO PROFIT CENTERS ON SITE



## PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

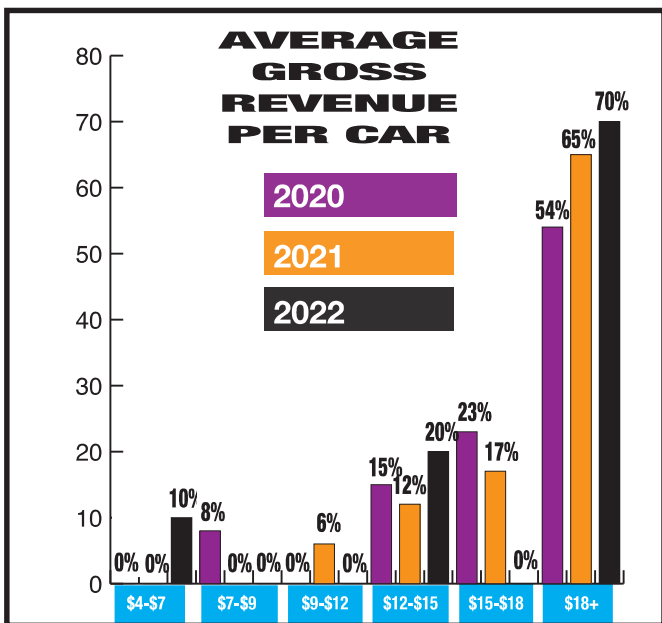


## ADVERTISING & PROMOTION

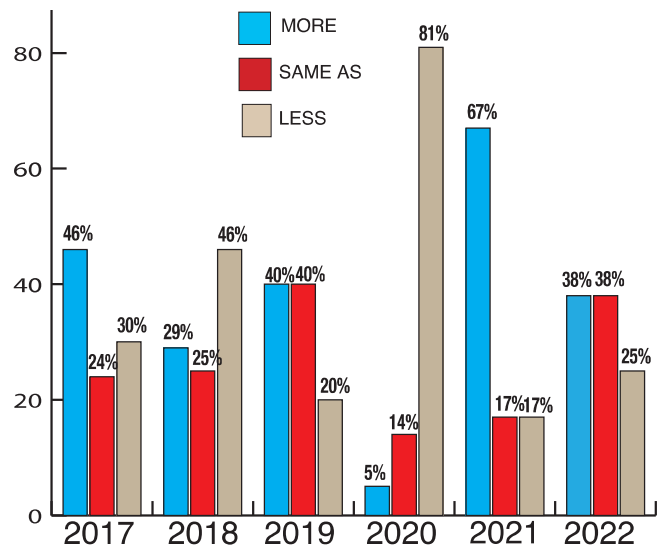


## OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)

OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)	
RENT	18.3%
EQUIPMENT & BLDG. MAINTENANCE	5.0%
CHEMICALS	4.5%
LABOR	38.3%
UTILITIES	12.0%
INSURANCE	3.7%
ADVERTISING & PROMOTION	4.0%
EQUIPMENT ON LEASE	0%
CUSTOMER CLAIMS	0.3%

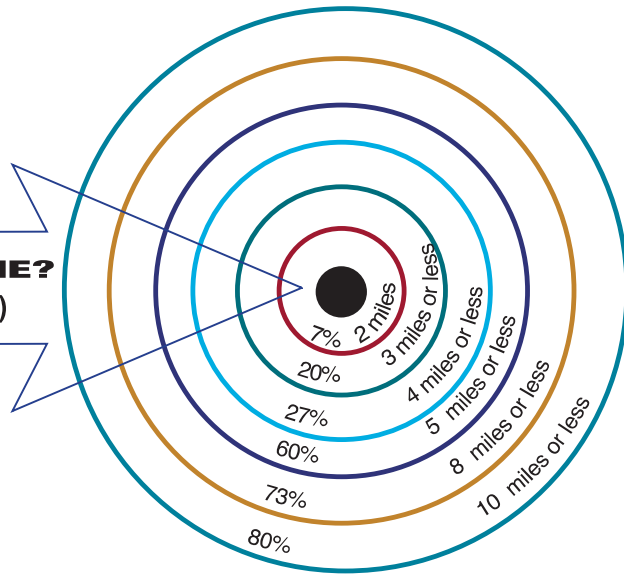


### INCOME: CURRENT YEAR VS. PREVIOUS YEAR



**SURVEY**

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



**AVG. WAGES PER HOUR PER EMPLOYEE**

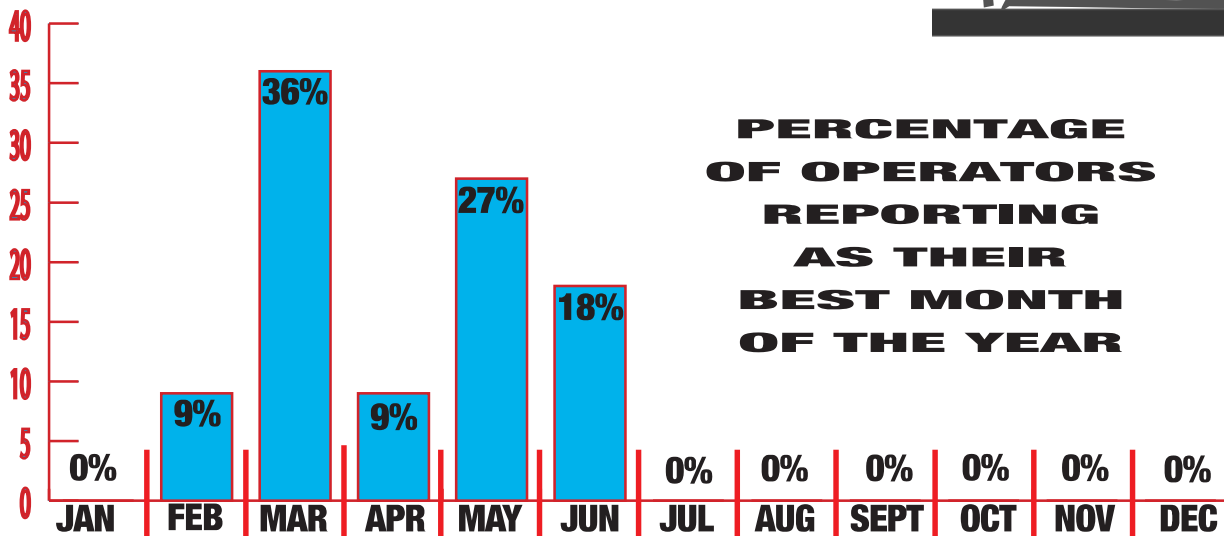
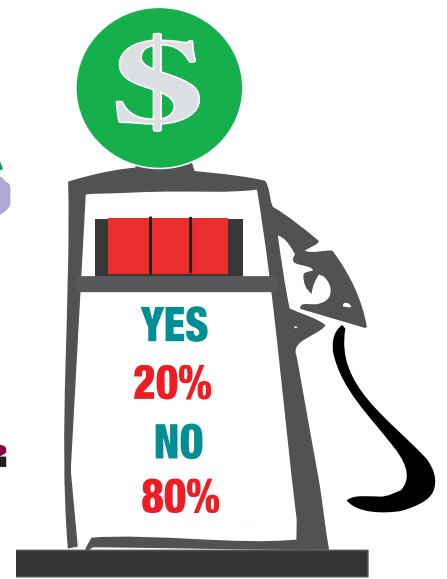


7%	PAID MINIMUM WAGE
20%	PAID MINIMUM WAGE to \$10 PER HOUR
7%	PAID \$10.00 to \$12.00 PER HOUR
67%	PAID OVER \$12.00 PER HOUR

**RECRUITING**

Very Easy	0%
Easy	19%
Difficult	44%
Very Difficult	38%

**OPERATORS SELLING GASOLINE**



**PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR**