



PROFESSIONAL
Carwashing
DETAILING

2016

PROFESSIONAL CARWASH

INDUSTRY SURVEY

BY PC&D EDITORIAL STAFF

New for this year, *Professional Carwashing & Detailing* combined its conveyor/tunnel, in-bay automatic (IBA) and self-serve surveys into one comprehensive survey. The response from our audience was overwhelming, and we thank the carwash professionals who took the time out of their busy day, or night, to complete our questionnaires and offer great feedback that will benefit the entire industry.

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Noteworthy results

Last year, in an article titled “Carwash market update,” we spoke with several carwash professionals with decades’ worth of experience in the industry. Many noted that the professional carwashing industry was experiencing a lot of growth in 2015; this trend was supported and continued into this year, according to our 2016 survey.

Seventy-two percent of this year’s survey respondents noted achieving greater or much greater car counts in 2015 compared to 2014. Also, according to our survey, 73 percent added that their total revenue was greater or much greater in 2015 compared to 2014. Furthermore, 64 percent of survey respondents expect their 2016 revenue to increase over their 2015 revenue.

According to Robert Andre, vice president of training and education for SONNY’S The CarWash Factory, in last year’s article, “Over the next three to five years we will continue to see tremendous growth in the carwash industry for two reasons: new investors entering the market and current owners looking to expand.”

Beyond the results

For several questions in this year’s survey, we sought additional responses from readers. For instance in the question “What is included in your best-selling packages?” while sealer wax lead the list with 79 percent, some “other” responses were not included in our list of options.

Some of the other services and products that respondents’ feature in their best-selling packages include:

- Hot wax
- Spray wax
- Door jam cleaning
- Dashboard cleaning
- Glass cleaning
- Lava bath
- Soap and pressure prewash.

When we asked our self-serve participants “Which of the following services are offered at your self-serve bays?” while foaming brush lead the pack with 88 percent, some “other” responses included:

- Undercarriage wash
- Tri foam brush

- Tri foam wax
- Snow foam.

Navigating our survey

We hope that you enjoy our industry benchmark survey and find it useful for adjusting and planning your operations in the future. Be sure to review our updated results and market report, which will be available later this year.

As previously mentioned, this survey was completed by conveyor/tunnel, IBA and self-serve carwash owners, managers, CEOs and presidents. Some of the questions featured in the survey were asked to all groups where commonalities and interests were the same or similar. However, some of the questions were strictly asked to the specific carwash model that best matched a respondent’s carwash.

We have added notes and indications throughout the following pages for such factors as multiple selections allowed and carwash model-specific questions.

Also, in order to make our survey more viewer friendly and modern, we have included several infographics throughout this year’s survey. Similar to all those we create and feature in *PC&D* and on Carwash.com, these infographics will also be posted in our digital archives at www.carwash-digital.com/issues for you to share with partners, employees and customers.

Four steps to stay competitive

Attending trade shows and reviewing market research, such as the following pages of this issue, are important for owners and operators in this industry to see how they stack up against their peers. However, there are other ways to remain competitive in the professional carwash industry.

According to Jason Sears, communications manager for Innovative Control Systems (ICS), trade magazines, such as *PC&D*, “provide great insights, whether you are a new operator or an industry veteran.”

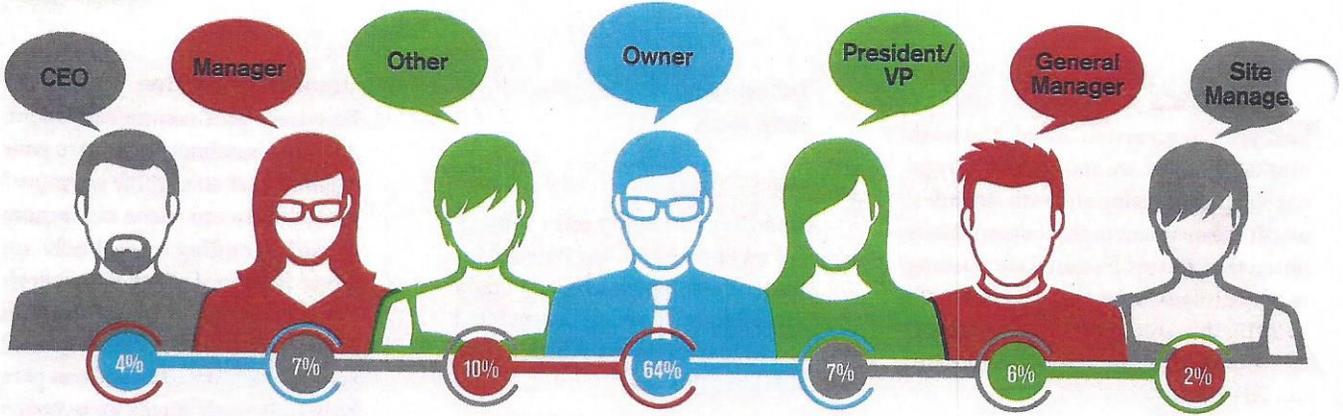
However, continues Sears, besides subscribing to and reading *PC&D*, here are four important steps that can help any

operator stay competitive:

1. Fine-tune your competitive radar. Are your numbers down? Are your regulars not so regular anymore? If so, where are those customers going? Spending a few bucks on some informal market research may provide you with the answers to those important questions. Review your competitors’ sites, and compare how your wash stacks up in terms of the total customer experience — not just wash quality. Look at the competitors’ washes through the customer’s eyes — not as an operator — and make the adjustments that will allow your site to stand out from the competition.
2. Invest in carwash management tools that help you monitor and analyze all aspects of your operation. This is especially important if you run multiple sites. But performance data is only helpful if you capture it, analyze it and make informed decisions based on that data. Missing just one of these three key steps will eliminate the value locked up in your performance data, so be thorough.
3. Invest your time and money to attend industry trade shows. Seeing old friends, making new contacts and staying informed on recent advancements in our industry are important. There is a whole lot of knowledge on the trade show floor, at the information sessions and the tours of other successful operators’ sites. Do not squander these opportunities to enhance your business by learning from the success of others.
4. Build relationships with the right suppliers — especially suppliers that have your success in mind. Trust carwash professionals who demonstrate that they want you to win, and can do so by sharing their knowledge and experience to get you into the winner’s circle.

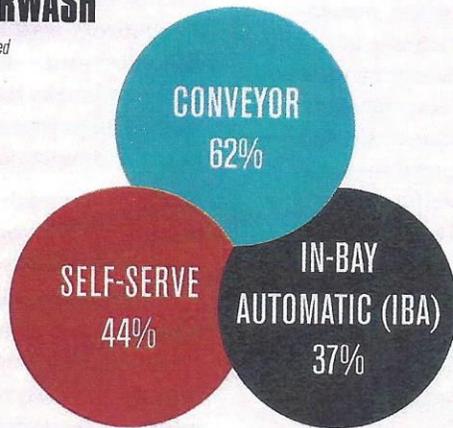
Thank you again to the respondents for taking the time to complete our survey, and thanks to everyone for reading *PC&D* magazine.

JOB TITLE

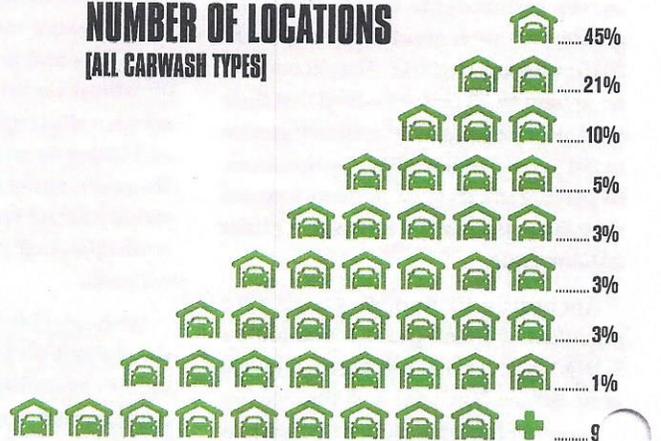


TYPE OF CARWASH

**Multiple responses allowed*

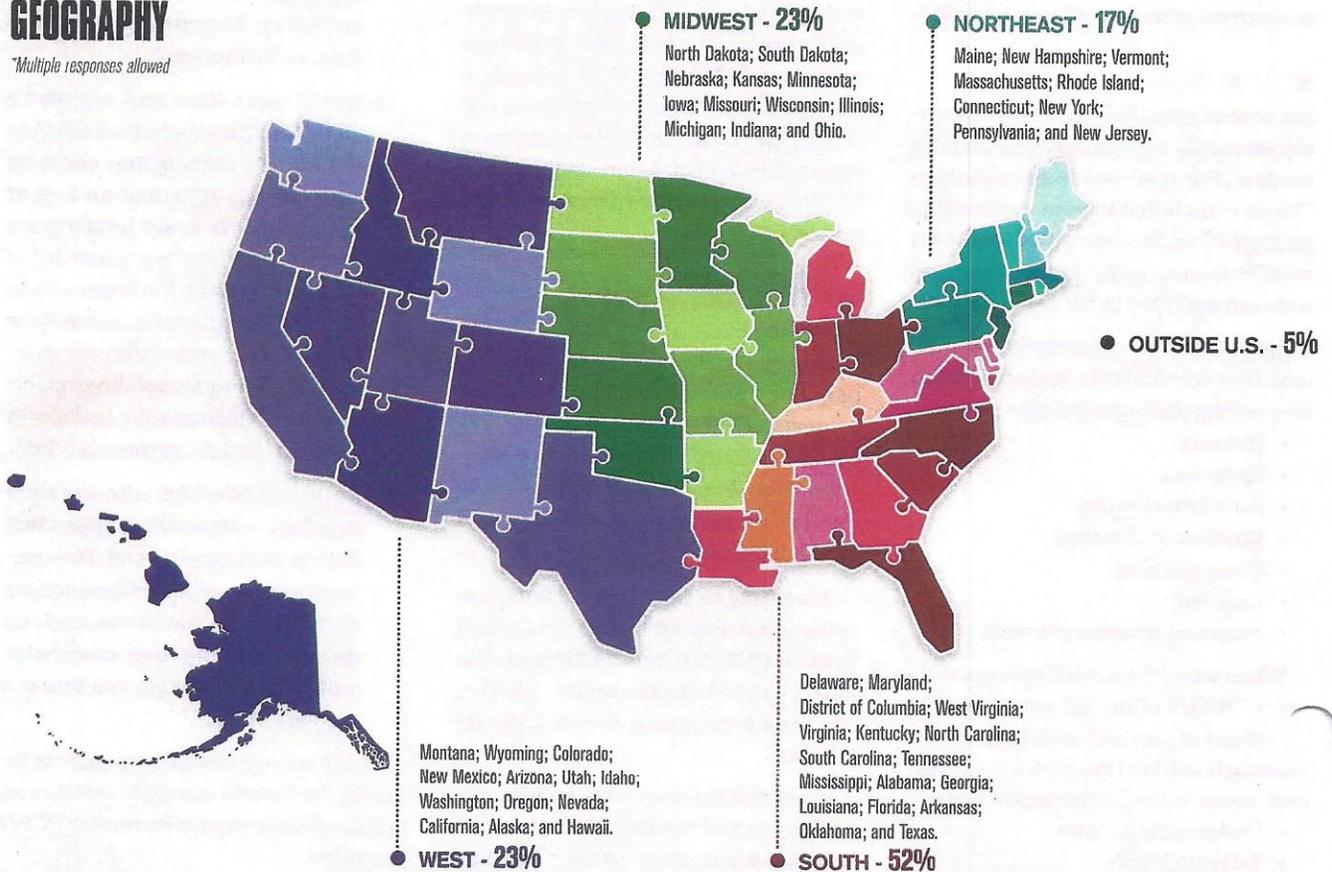


NUMBER OF LOCATIONS (ALL CARWASH TYPES)



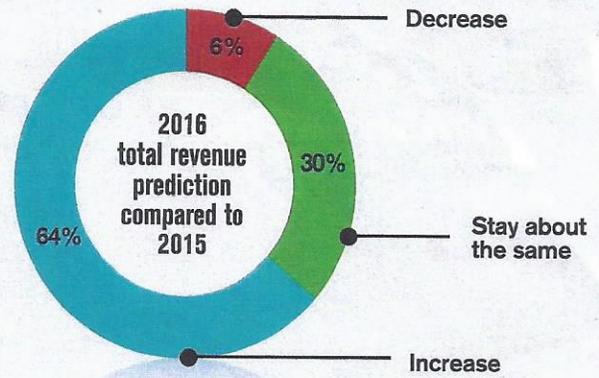
GEOGRAPHY

**Multiple responses allowed*

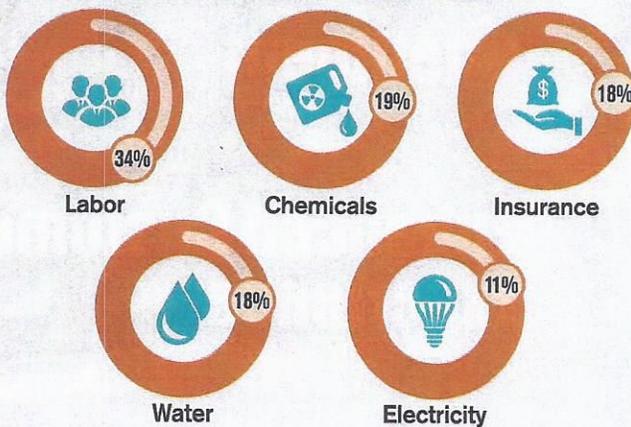


2015 VS 2014 COMPARISON

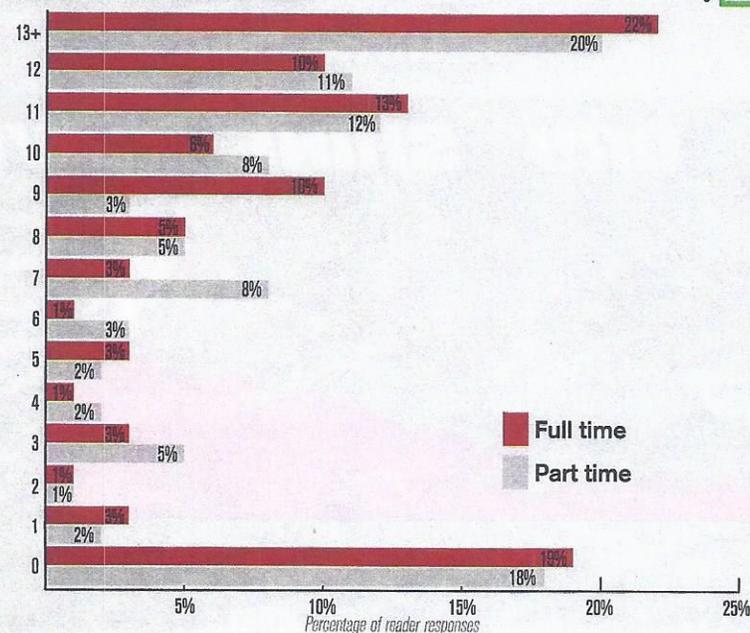
	 Annual Car Count	 Total Revenue
Much greater in 2015 than in 2014	28%	27%
Greater in 2015 than in 2014	44%	46%
About the same in 2015 as in 2014	20%	19%
Less in 2015 than in 2014	7%	7%
Much less in 2015 in 2014	1%	1%



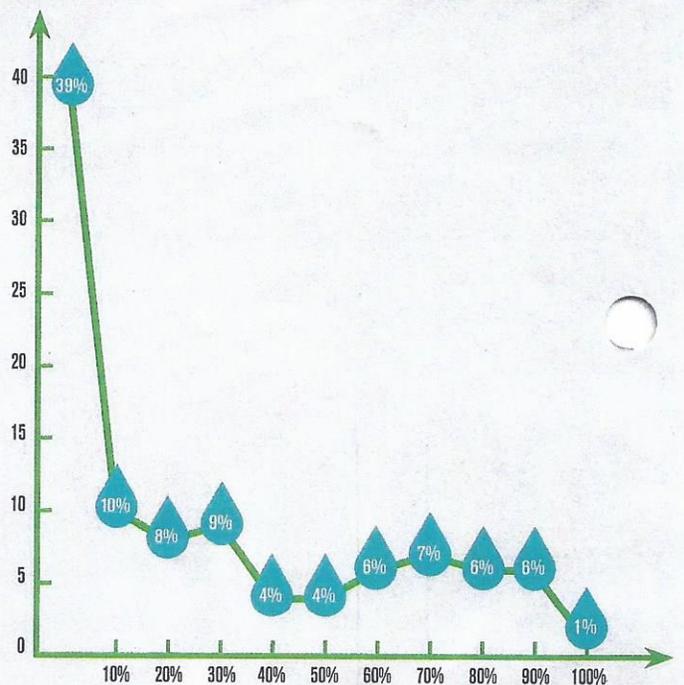
ESTIMATED ANNUAL EXPENSES AS PERCENTAGE OF TOTAL OVERALL OPERATING COSTS



NUMBER OF EMPLOYEES



PERCENTAGE OF WATER RECYCLED/RECLAIMED



WAGES

Average starting hourly wage for on-line workers

 \$9.29

Average hourly wage for on-line workers

 \$10.98

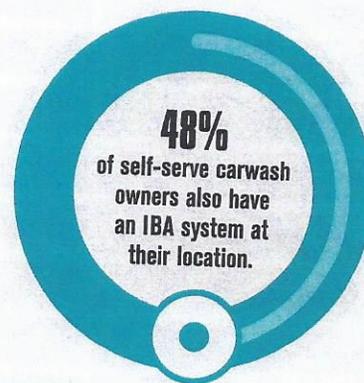
Average hourly wage for managers

 \$15.00


NUMBER OF LOCATIONS [BY CARWASH TYPE]

	Self-Serve	IBA	Conveyor
1	57%	58%	49%
2	23%	18%	23%
3	7%	11%	5%
4	2%	8%	5%
5	7%	2%	1%
6 or more	4%	3%	17%

**Self-serve respondents only* **IBA respondents only* **Conveyor respondents only*



**Self-serve respondents only*

NUMBER OF VACUUMS

	Self-Serve	IBA
0	N/A	7%
1	2%	3%
2	11%	7%
3	8%	20%
4	16%	13%
5	11%	7%
6	22%	20%
7	3%	3%
8	8%	10%
9	N/A	N/A
10	3%	N/A
11 or more	16%	10%

PRICE/TIME OF SELF-SERVE WASH

	Average
Startup price	\$2.66
Price per additional cycle	\$1.78
Minutes of startup	4:10
Minutes per additional cycle	2:42

**Self-serve respondents only*

PRICE/TIME OF VACUUM CYCLE

	Self-Serve	IBA
Price per vacuum cycle	\$1.41	\$1.30
Price per additional vacuum cycle	\$1.14	\$0.93
Duration in minutes per vacuum cycle	4:38	4:30

**Self-serve respondents only*

SERVICE OFFERINGS

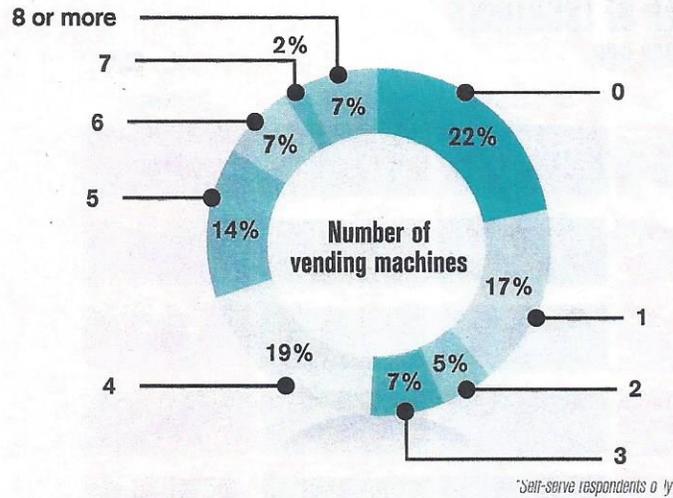
Foaming brush	88%
Presoak	86%
Spray wax	81%
Tire/engine cleaner	81%
Vacuum	81%
Spot-free	74%
Vending	64%
Dryer	33%
Floormat cleaning	33%
Truck/RV	31%
Fleet programs	19%
Loyalty programs	17%
Other	10%
None of these	2%

**Self-serve respondents only; multiple responses allowed*

ADDITIONAL PROFIT CENTERS

IBA carwash	54%
None of these	26%
Detailing center	21%
Conveyor carwash	10%
Lobby sales/extensive vending	10%
Quick lube/oil change	8%
Convenience store	5%
Pet wash	5%
Coin laundry	3%
Gas station	3%
Other	3%
Self-storage	3%

*Self-serve respondents only; multiple responses allowed



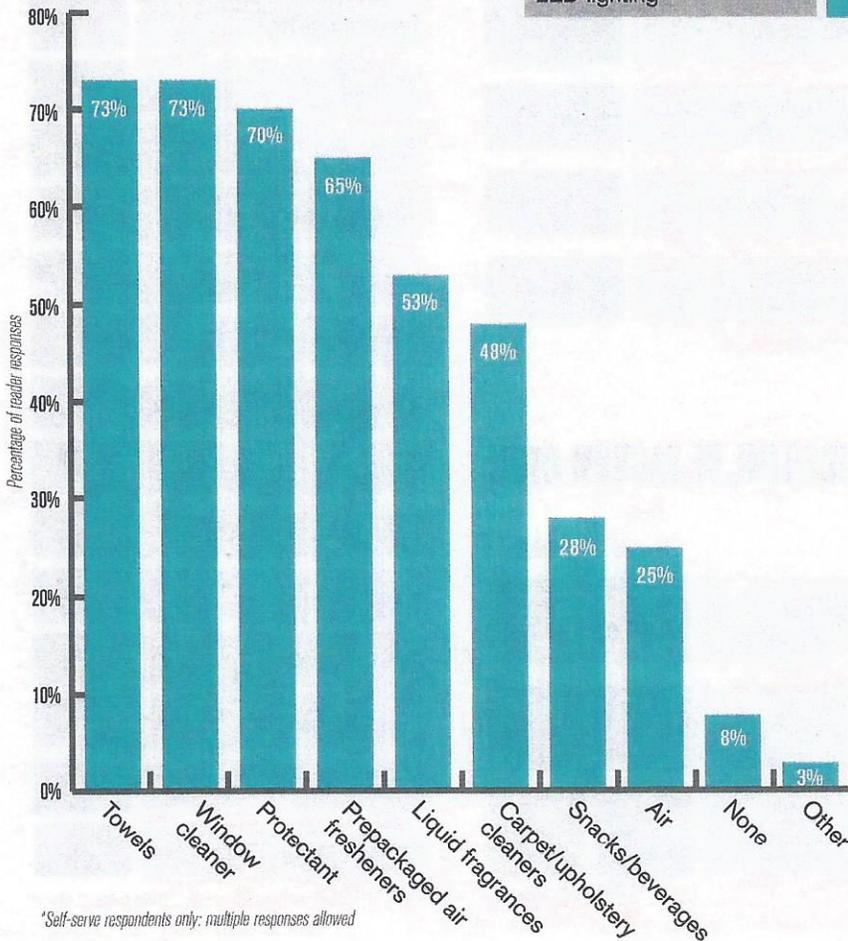
*Self-serve respondents only

ADDITIONAL BAY FEATURES

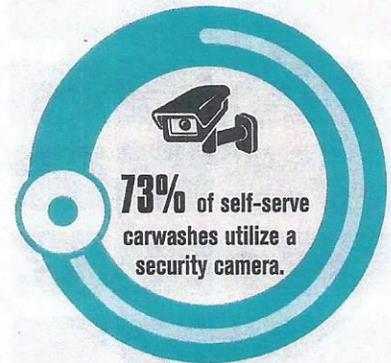
Cash/coin payment	73%	Floor heat	41%
Last coin alert	66%	Time accumulators	41%
Water softener	63%	Fluorescent/CFL lighting	34%
Water heater	49%	Token payment	24%
RO/DI rinse	46%	Water reclaim	22%
Credit/debit card system	44%	None of these	10%
LED lighting	44%	RFID	5%

*Self-serve respondents only; multiple responses allowed

PRODUCTS/SERVICES OFFERED



*Self-serve respondents only; multiple responses allowed

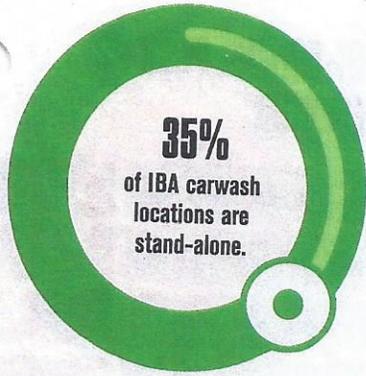


*Self-serve respondents only

NEAREST SELF-SERVE COMPETITOR

Under 1 mile	15%
2 to 4 miles	44%
5 to 7 miles	31%
8 to 10 miles	8%
11 or more miles	2%

*Self-serve respondents only



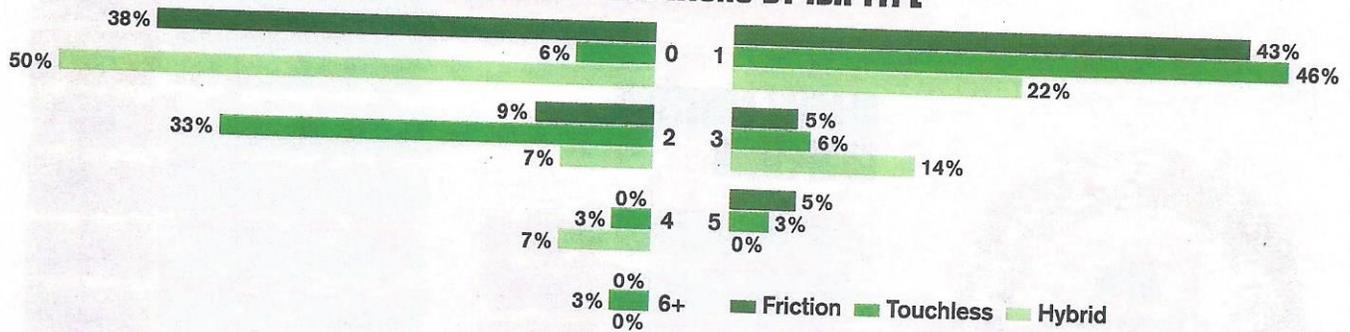
*IBA respondents only

ADDITIONAL PROFIT CENTERS

Self-serve carwash	61%	Gas station	6%
None of these	19%	Lobby sales/extensive vending	6%
Detailing center	16%	Pet wash	6%
Quick lube/oil change	16%	Other	6%
Conveyor carwash	13%	Coin laundry	3%
Convenience store	6%	Self-storage	3%

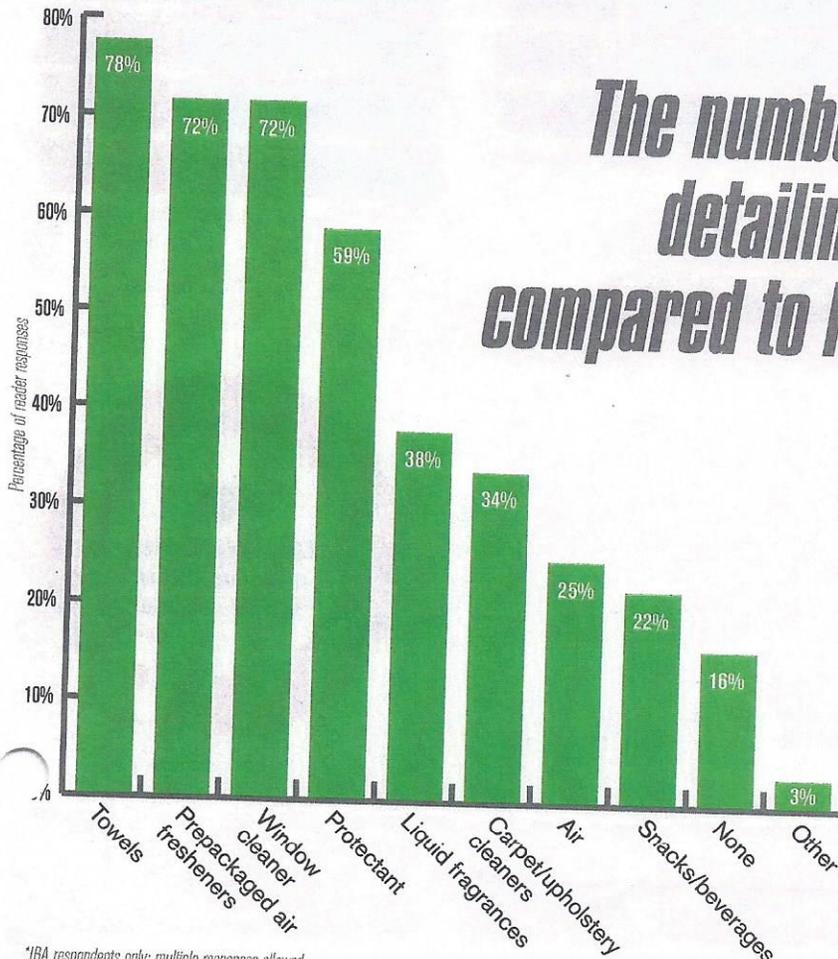
*IBA respondents only; multiple responses allowed

NUMBER OF LOCATIONS BY IBA TYPE



*IBA respondents only

VENDING PRODUCTS OFFERED



*IBA respondents only; multiple responses allowed

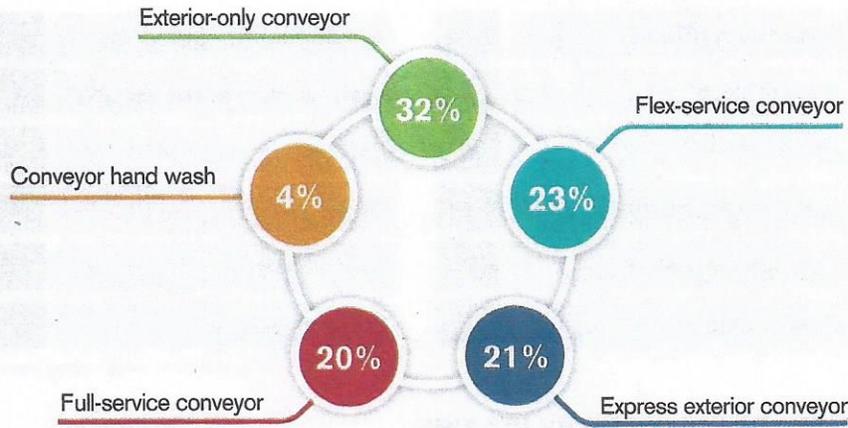
The number of IBAs offering detailing centers doubled compared to last year's survey.

NEAREST IBA COMPETITOR

Under 1 mile	27%
2 to 4 miles	43%
5 to 7 miles	20%
8 to 10 miles	27%
11 or more miles	3%

*IBA respondents only

CARWASH TYPE



**Conveyor respondents only*

BEST-SELLING PACKAGE OFFERINGS

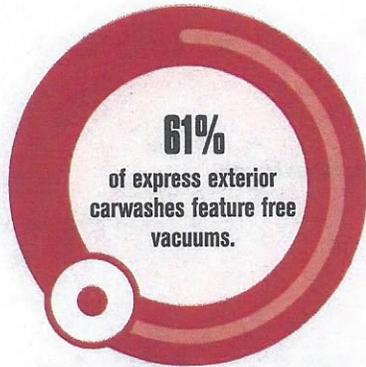
Sealer wax	79%
Foam polish	75%
Undercarriage wash	75%
Wheel treatment	74%
Spot-free rinse	69%
Exterior protectant	68%
Polish wax	67%
Bug removal	64%
Clearcoat treatment	63%
Whitewall cleaning	42%
Fragrance	40%
Rust inhibitor	24%
Other	19%
Floormat cleaning	18%
Interior protectant	10%

**Conveyor respondents only; multiple responses allowed*

NEAREST CONVEYOR COMPETITOR

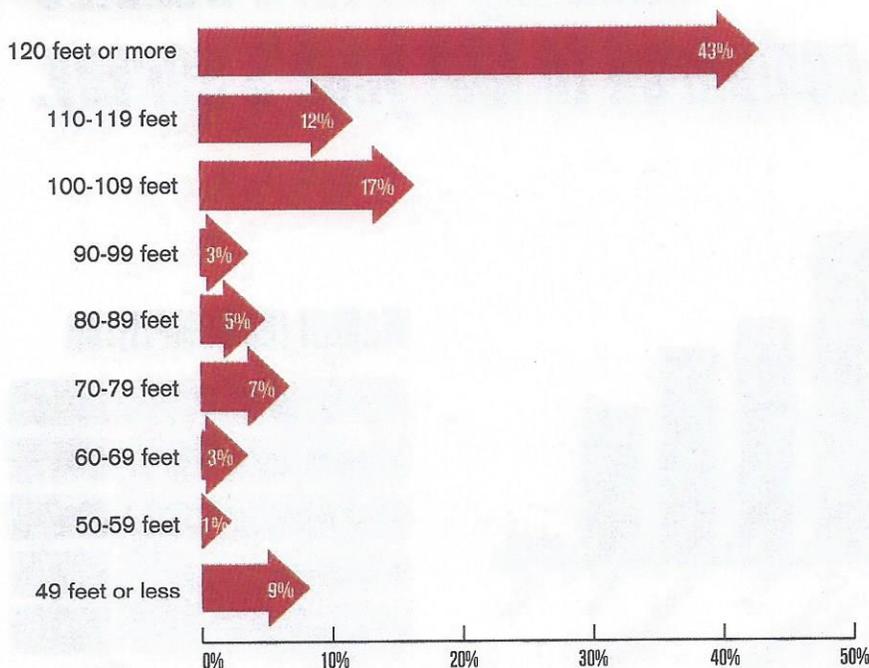
Under 1 mile	26%
2 to 4 miles	37%
5 to 7 miles	19%
8 to 10 miles	3%
11 or more miles	11%
N/A	4%

**Conveyor respondents only*

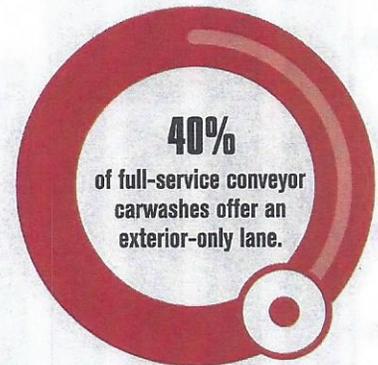


**Conveyor respondents only*

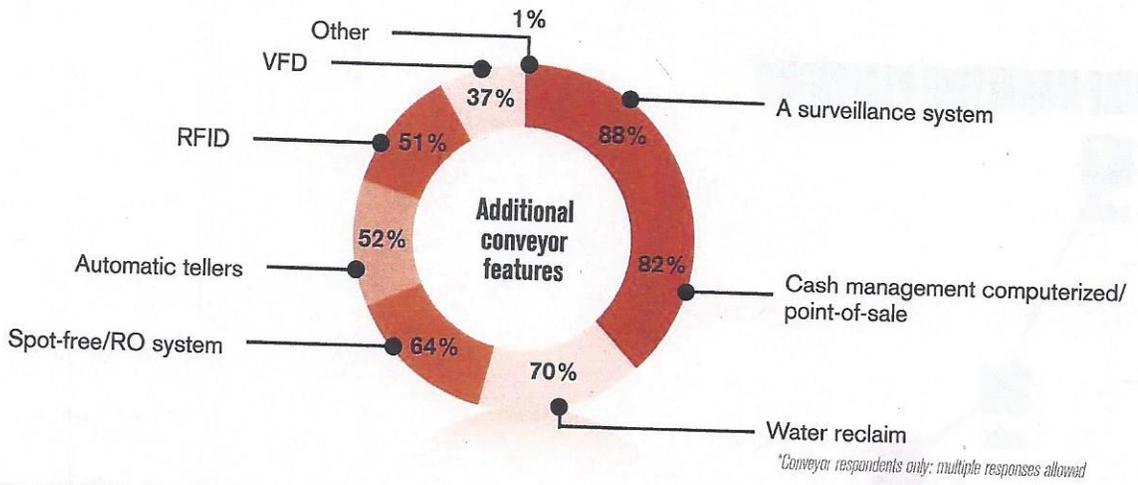
TUNNEL LENGTH



**Conveyor respondents only*



**Conveyor respondents only*

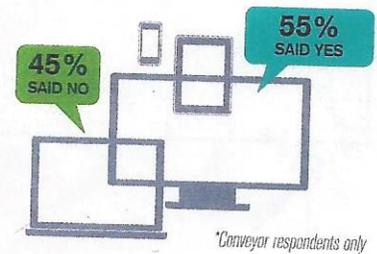


ADDITIONAL PROFIT CENTERS

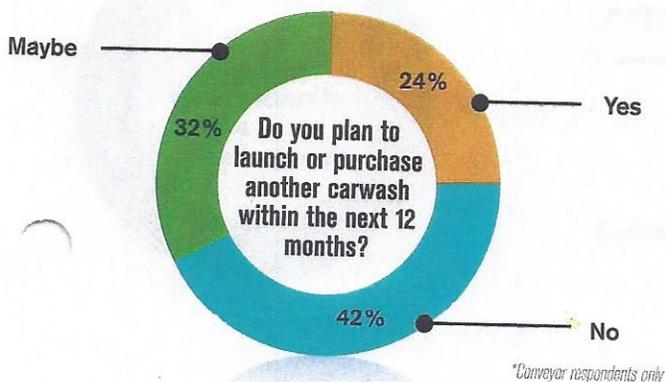
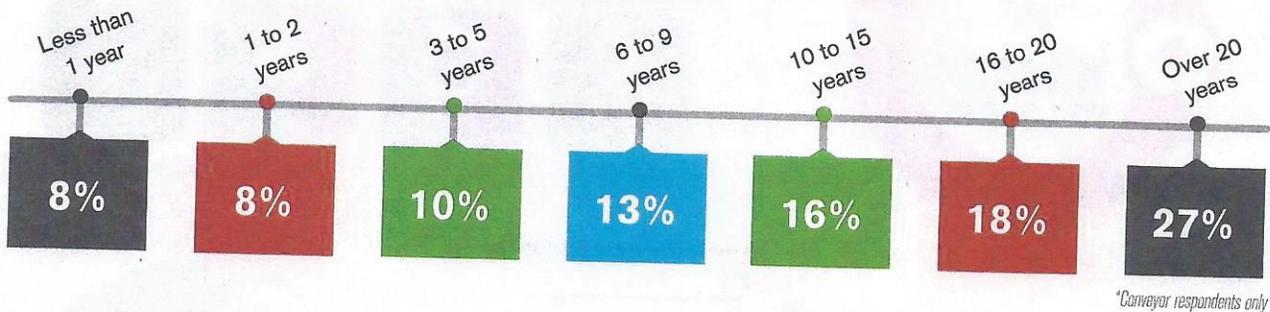
Detail center	49%	Quick lube/oil change	13%
None of these	28%	IBA carwash	10%
Food/beverages	22%	Pet wash	6%
Lobby sales/extensive vending	21%	Ice vending	3%
Self-serve carwash	18%	New/used car sales	3%
Gas station	15%	Other	3%
Convenience store	14%		

**Conveyor respondents only; multiple responses allowed*

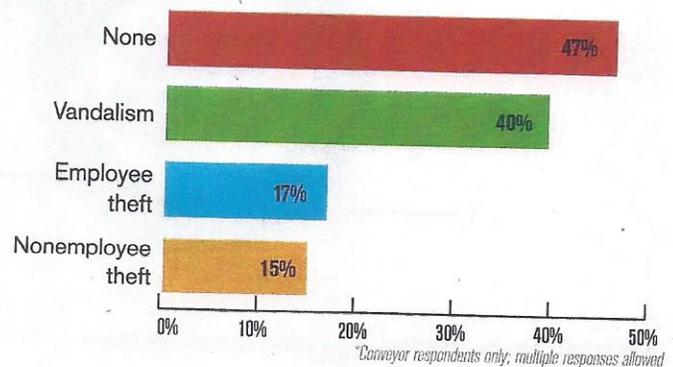
ACTIVE WEBSITE



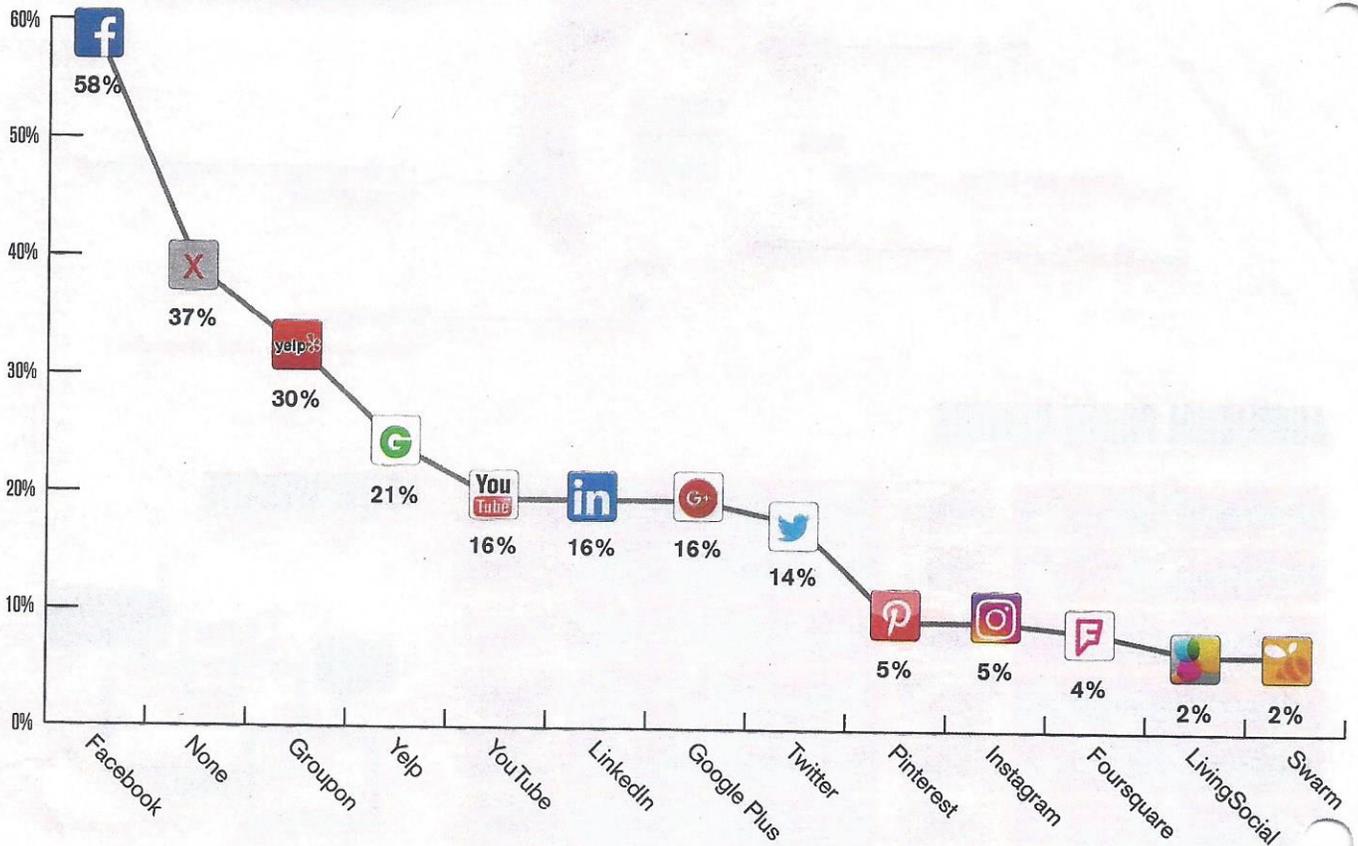
HOW LONG AGO DID YOU OPEN YOUR FIRST CARWASH?



CRIME IN 2015



ONLINE MARKETING PLATFORMS



**Conveyor respondents only; multiple responses allowed*



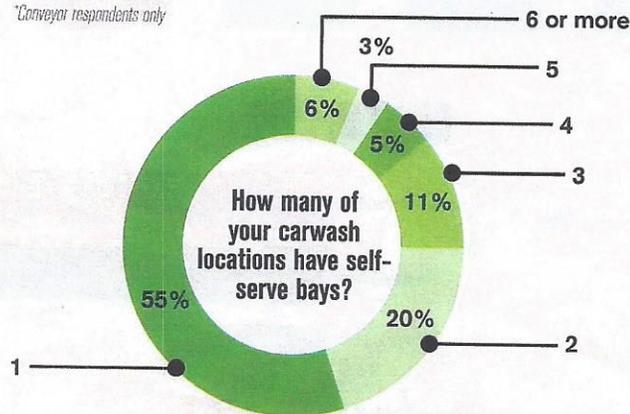
**Conveyor respondents only*

BUSIEST SEASON

• SPRING • SUMMER • AUTUMN • WINTER •



**Conveyor respondents only*



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