



**AutoLaundry**<sup>news</sup>  
THE VOICE OF THE CAR CARE INDUSTRY

*Results from the  
Auto Laundry News*

# 2015 Full/Flex Survey

[www.carwashmag.com](http://www.carwashmag.com)



**Results From The  
Auto Laundry News**

**2015**

**Full/Flex Survey**

**T**he 2015 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 vs. Flex-Service Sites**

For purposes of comparison, survey responses from full-service sites are on occasion tabulated separately from flex-service responses. As was the case last year, full-service participants make up 74 percent of the total, with flex-service sites accounting for 26 percent.

The imprecision with which operators self-identify as either full-service or flex-service locations, first noted in last year's report, continues in the current survey. This is particularly evident in the reported presence or absence of a freestanding after-care center on site.

**Revenues**

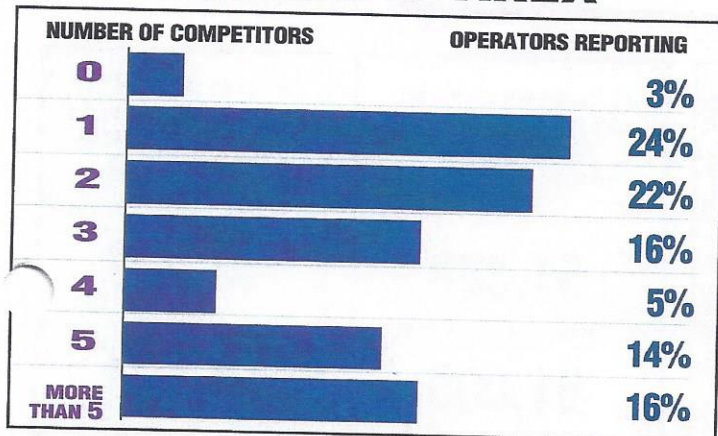
Overall, 67 percent of respondents report increased income compared to the previous year. This compares to the 39 percent who reported progress in last year's survey. The graphic on page 48 provides a three-year perspective. In a turnaround from last year, full-service participants outperform flex-service respondents, and by a not-negligible margin: 71 percent of the former report income growth; 56 percent of the latter do so. With regard to declining revenues, flex-service lags as well: 22 percent saw a drop in income, while 17 percent of full-service respondents did so.

Full-service respondents, who made progress, report an average income growth of 8.1 percent over the previous year, while those who experienced reversals report an average decline in income of 5 percent. Though a smaller percentage of flex-service respondents experienced growth, those who did fared better than their full-service counterparts, notching up a 13 percent average increase in income.

**Expansion**

Overall, 11 percent of respondents are planning on building a new wash in the next 12 months. Half of these plans call for express-exterior facilities, while the rest are evenly divided between full-service and flex-service locations.

**COMPETING CONVEYOR  
WASHES IN AREA**



**11.2 FULL-TIME 13.9**

**5.9 PART-TIME 8.4**



**8.6 FULL-TIME 10.5**

**5.3 PART-TIME 5.7**



**3.0 FULL-TIME 6.0**

**2.0 PART-TIME 6.0**



**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	10	10	11	18	25	15
<b>Mountain</b> Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	*	*	*	*	*	*	*
<b>Midwest</b> Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	*	*	*	*	*	*	*
<b>Central</b> Illinois-Indiana-Michigan-Ohio-Wisconsin	9	11	11	13	23	26	7
<b>South Central</b> Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	19	11	15	13	22	20	0
<b>Southeast</b> Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	11	10	12	15	21	28	3
<b>Mid-Atlantic</b> New Jersey-New York-Pennsylvania	12	10	10	14	18	21	15
<b>New England</b> Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	9	7	10	10	22	32	10

\* Too Few Responses

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

	WINTER	SPRING	SUMMER	FALL
<b>Pacific</b>	15	27	43	15
<b>Mountain</b>	*	*	*	*
<b>Midwest</b>	*	*	*	*
<b>Central</b>	35	21	22	22
<b>South Central</b>	20	30	20	30
<b>Southeast</b>	29	30	17	24
<b>Mid-Atlantic</b>	40	25	16	19
<b>New England</b>	35	23	30	12

\* Too Few Responses

**OPEN SUNDAY**

Full Service • Flex Service

**65% • 67%**

**OPEN 24 HOURS**

Full Service • Flex Service

**4% • 0%**

**AVERAGE DAILY TRAFFIC COUNT**

**AVERAGE ANNUAL WASH VOLUME**

**AVERAGE MONTHLY IMPULSE SALES**

**Full Service**

**33,600**

**51,300**

**\$1,547**

**Flex Service**

**36,200**

**61,000**

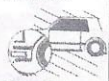
**\$1,174**



## EXTRA SERVICES OFFERED

Average Price % Of Operators Offering Services

### DETAIL



FULL	\$129.64	77%
FLEX	\$111.67	67%

### UPHOLSTERY CLEANING



FULL	\$52.43	73%
FLEX	\$39.99	78%

### QUICK LUBE



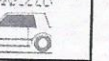
FULL	\$43.45	8%
FLEX	\$35.00	22%

### CARPET SHAMPOO



FULL	\$37.13	77%
FLEX	\$35.99	89%

### EXTERIOR VINYL PROTECTANT



FULL	\$20.80	38%
FLEX	\$11.00	56%

### INTERIOR VINYL PROTECTANT



FULL	\$23.56	50%
FLEX	\$16.67	44%

### WAX AND HAND BUFF



FULL	\$61.49	65%
FLEX	\$52.50	56%

### WAX AND MACHINE BUFF



FULL	\$99.29	42%
FLEX	\$88.75	67%

## EXTRA ON-LINE SERVICES SOLD

### 10% TO 20% OF CARS WASHED

2011	15%
2012	15%
2013	23%
2014	6%

### 21% TO 30% OF CARS WASHED

2011	15%
2012	3%
2013	3%
2014	20%

### 31% TO 40% OF CARS WASHED

2011	21%
2012	9%
2013	19%
2014	20%

### 41% TO 50% OF CARS WASHED

2011	6%
2012	19%
2013	6%
2014	6%

### 51% TO 60% OF CARS WASHED

2011	23%
2012	21%
2013	23%
2014	17%

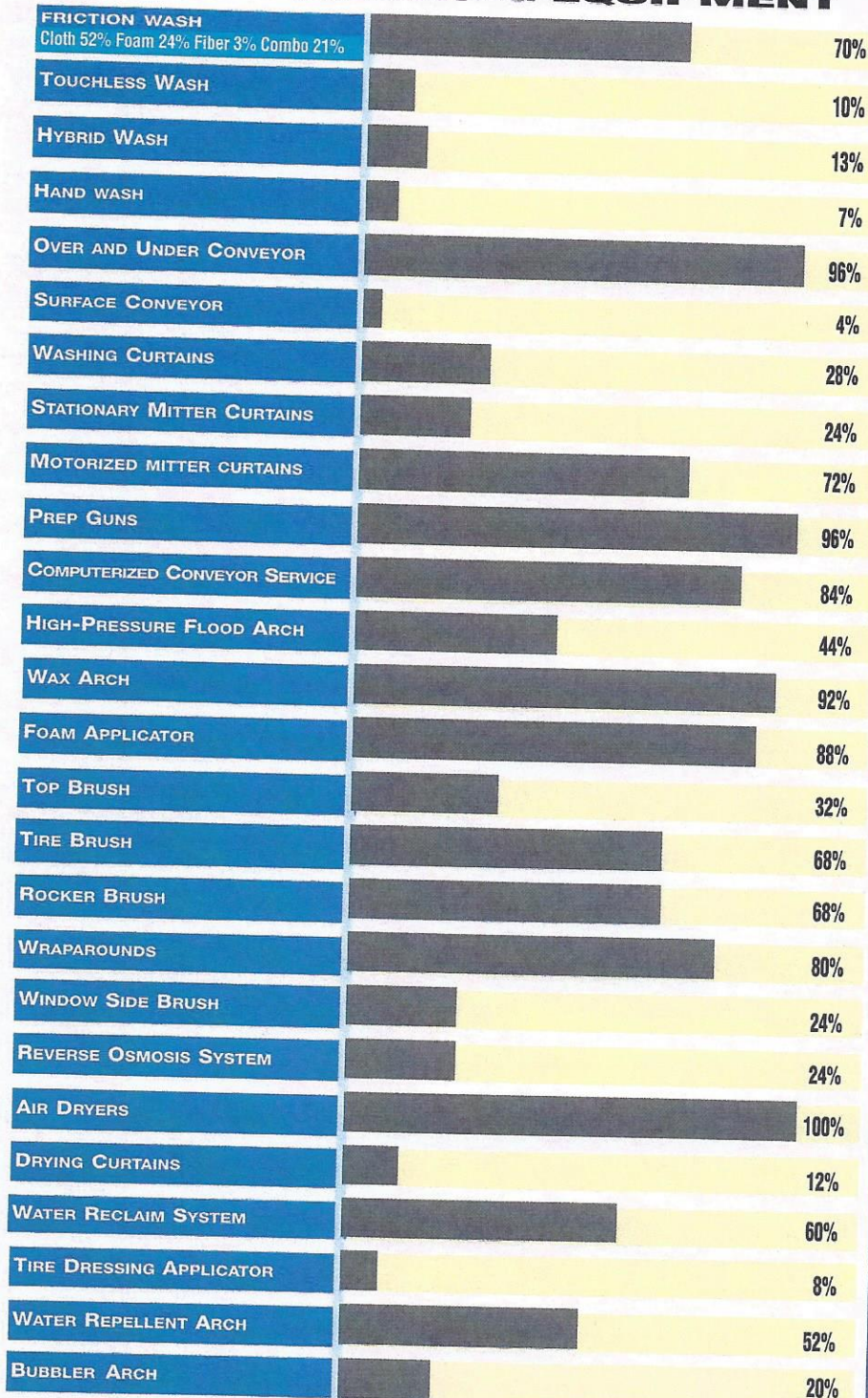
### OVER 60% OF CARS WASHED

2011	20%
2012	19%
2013	6%
2014	20%

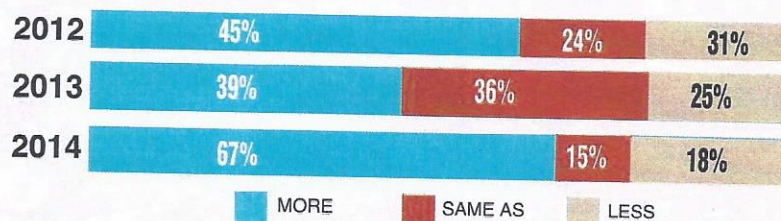


# SURVEY

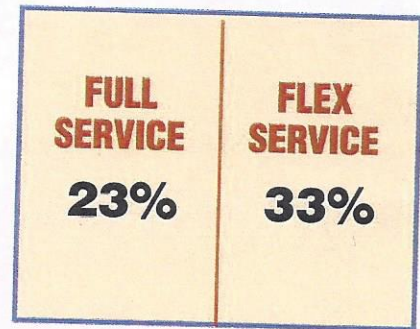
## PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



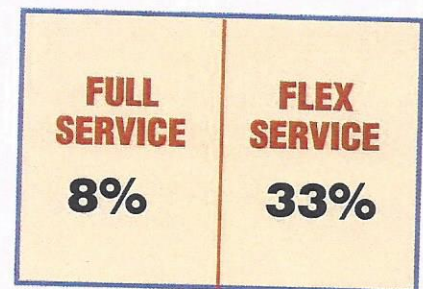
## INCOME: CURRENT YEAR VS. PREVIOUS YEAR



## OPERATE FREESTANDING AFTER-CARE CENTER



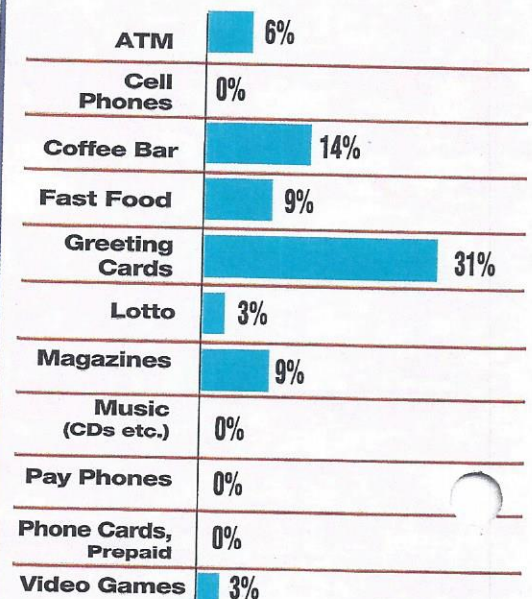
## OPERATE COIN-OP BAYS ON SITE



## AVERAGE NUMBER OF BAYS

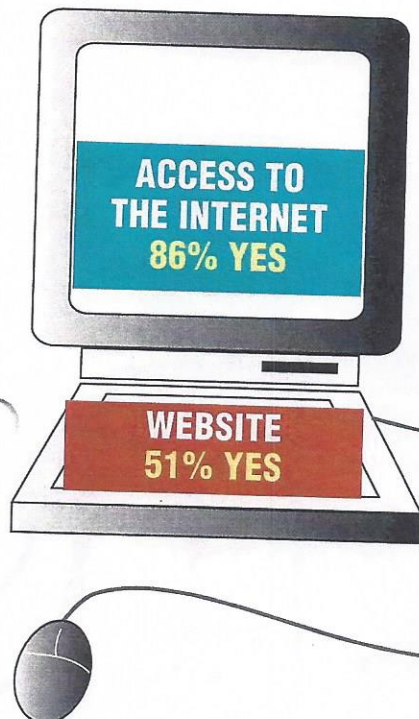
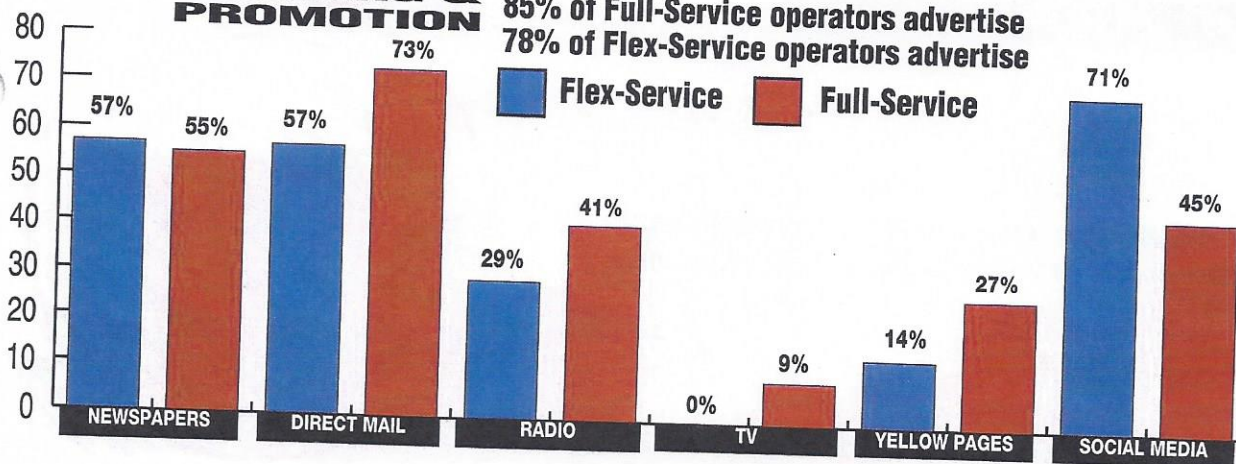


## NON-AUTO PROFIT CENTERS ON SITE



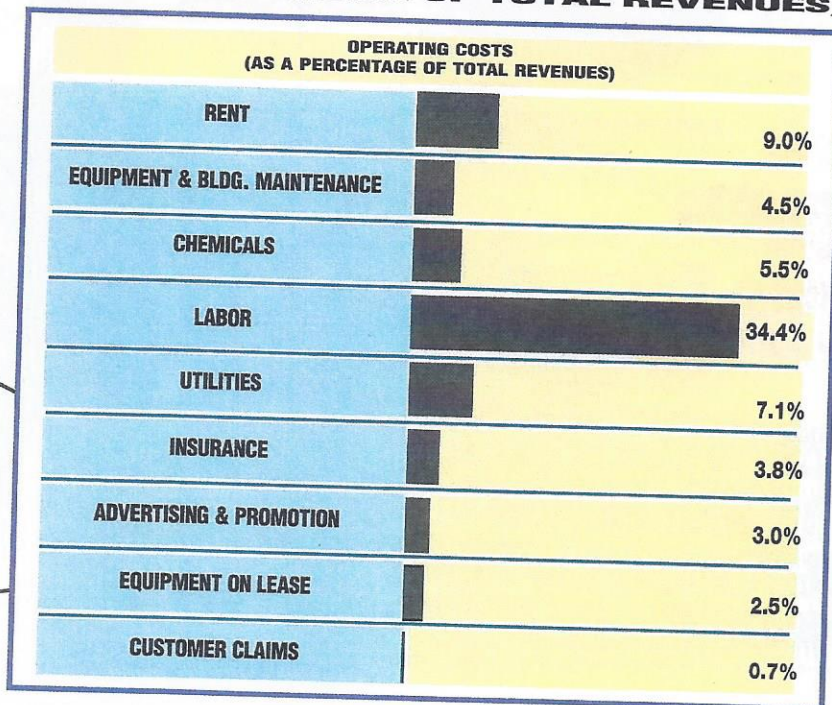


## ADVERTISING & PROMOTION

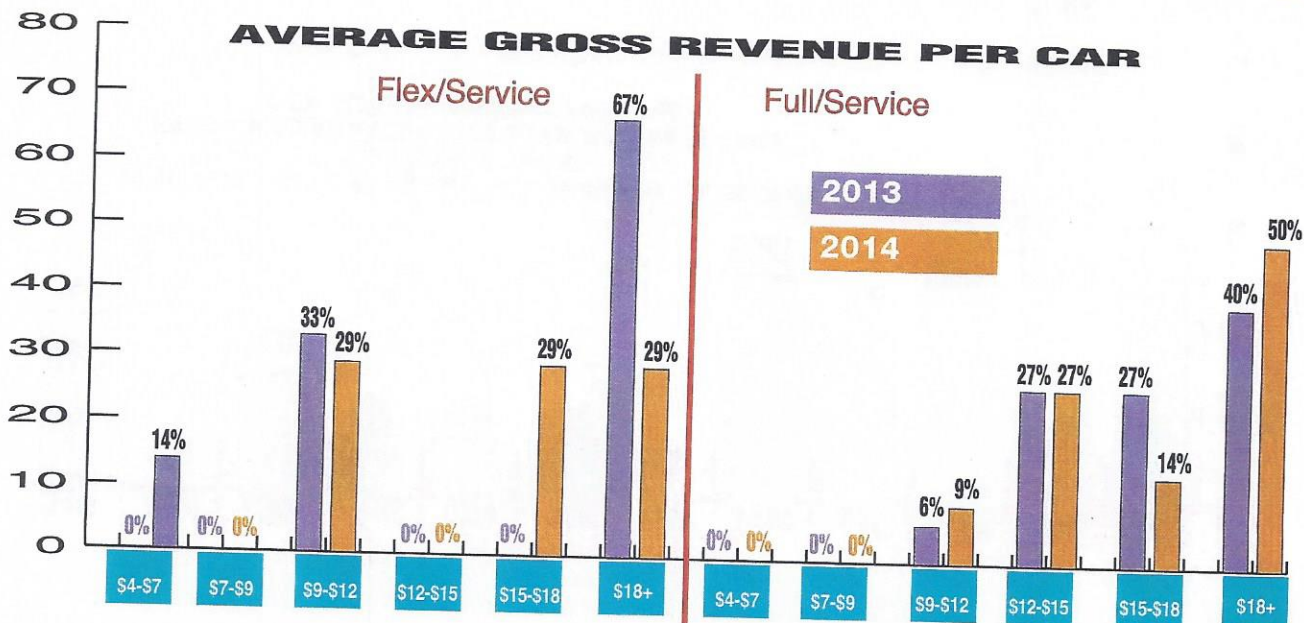


WEBSITE  
51% YES

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



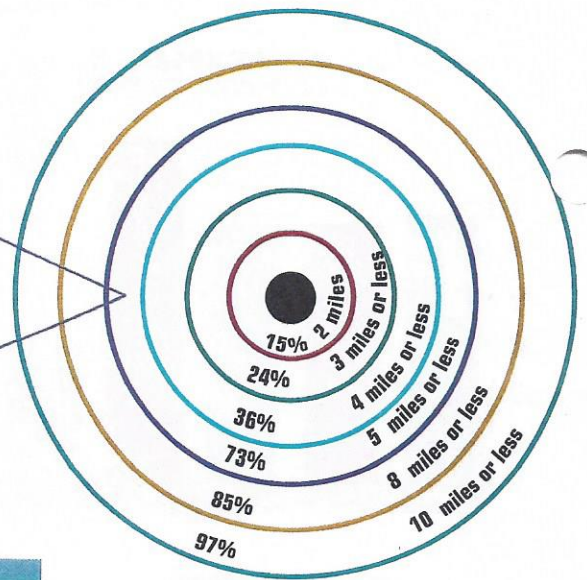
## AVERAGE GROSS REVENUE PER CAR



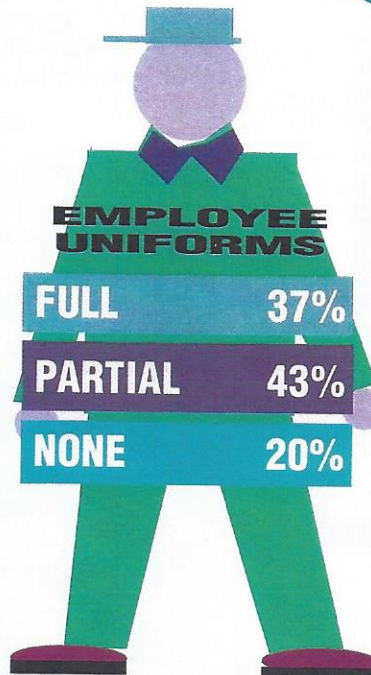
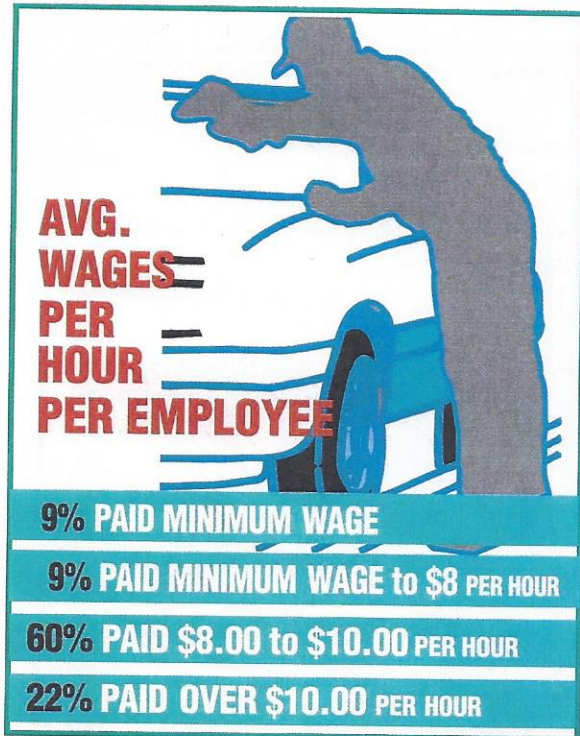


## SURVEY

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



## LABOR COSTS



## OPERATORS SELLING GASOLINE

