AutoLaundry news

2022 AUTOMATIC SURVEY

The 2022 *Auto Laundry News* In-Bay Automatic Survey was conducted by mailing questionnaires to a random selection of subscribers who own and/or operate in-bay automatic car wash equipment. The information in this survey results from an analysis of data provided by respondents throughout the United States.

On occasion, for purposes of comparison, survey responses from sites with self-serve wand bays (sites with) and sites without this type of equipment (sites without) are tabulated separately. In the current survey, participating locations with self-serve wand bays make up 73 percent of the total response. This compares to 68 percent who were so equipped in last year's survey.

Wash Volume

Overall, 50 percent of participants report wash volume increases over the previous year. This is a small improvement over the 48 percent who reported gains in the previous survey and the first time since 2019 to achieve this level of performance. The graphic on page 34 provides a seven-year perspective. At 21, the percentage of survey respondents who report declining volumes has shrunk quite a bit from the three previous surveys when 33 percent, 34 percent, and 33 percent reported year-over-year reversals.

Sites with continue to outperform sites without, to what extent has been somewhat in flux. Last year, 50 percent of sites with reported increased volume while 44 percent of sites without reported the same, narrowing the gap and marking a reversal from the previous three surveys which showed a growing disparity in the performance of the two categories. This year that gap has widened again — substantially — with 60 percent of sites with reporting increases and only 25 percent of sites without reporting progress.

On the negative side, reports on declining wash volumes highlight in dramatic fashion the imbalance in performance between sites with and sites without. While only 10 percent of the former report fewer cars washed, fully half of the later report declining volumes.

Revenue

Overall, the average gross revenue per in-bay customer is $9.90, down less than buck from the $10.60 recorded in last year's survey. With sites with reporting an average per-car ticket of $10.07 and sites without recording an average of $9.48 per car, sites with outperform sites without by this measure, too.

Future

Respondents are showing far less confidence than they did last year when, overall, 42 percent were planning to purchase new equipment in the following 12 months. The current survey reveals a tendency to tighten the purse strings. Only 27 percent of survey participants, overall, plan on buying new equipment in the next 12 months, Furthermore, those plans are sticking to the basics: vacuums, in-bay automatics, and dryers.

Operators are being equally conservative regarding expansion of their holdings. Compared to 26 percent last year, only 7 percent of respondents have plans to build a new wash during the next 12 months. And, again, those plans consist of what these operators are most familiar with: in-bay automatics and self service.

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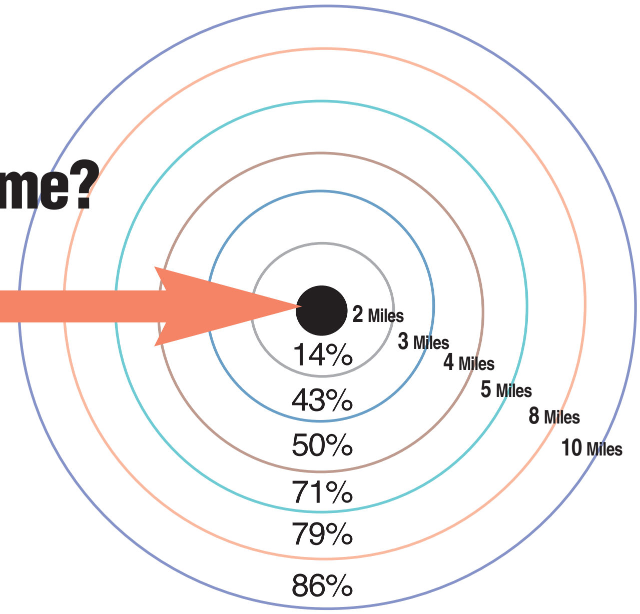
PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK

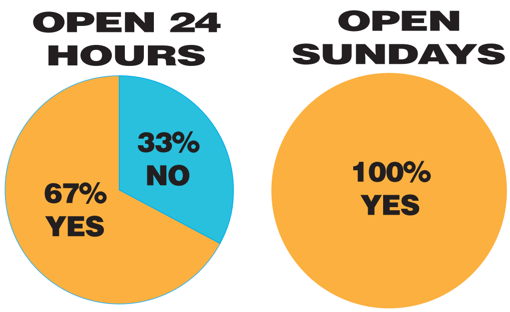
	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	11	10	10	13	18	23	14
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	*	*	*	*	*	*	*
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	14	14	13	14	17	15	13
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	8	8	8	9	17	25	24
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	10	9	9	14	21	22	16
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	12	11	11	12	15	22	17
Mid-Atlantic New Jersey-New York-Pennsylvania	10	9	9	8	18	28	18
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	12	8	8	13	21	21	17

NOTE: Some results do not total 100 due to rounding ***Too Few Responses**

How Far Do Customers Come?

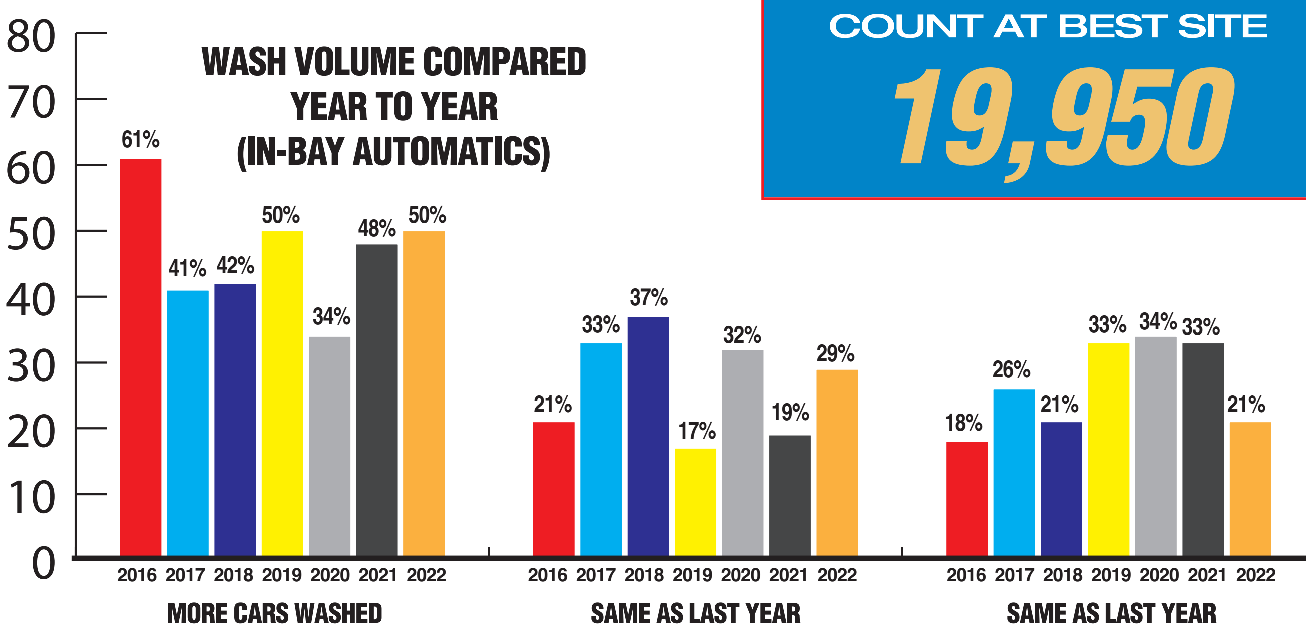
(Percent from within 2-mile radius, 3-mile radius etc.)





AVERAGE DAILY TRAFFIC COUNT AT BEST SITE

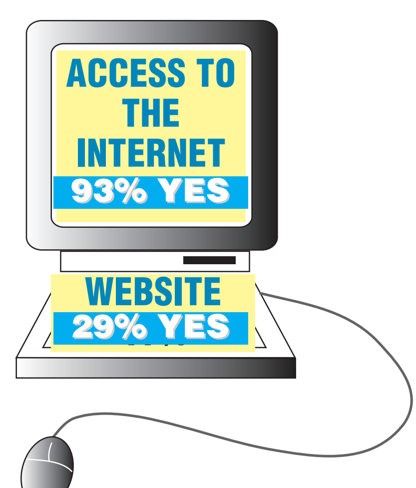
19,950



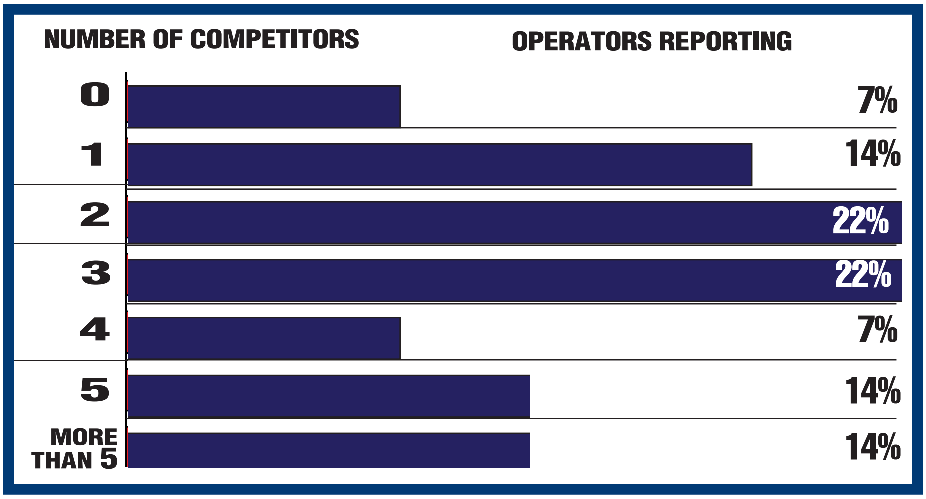
PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

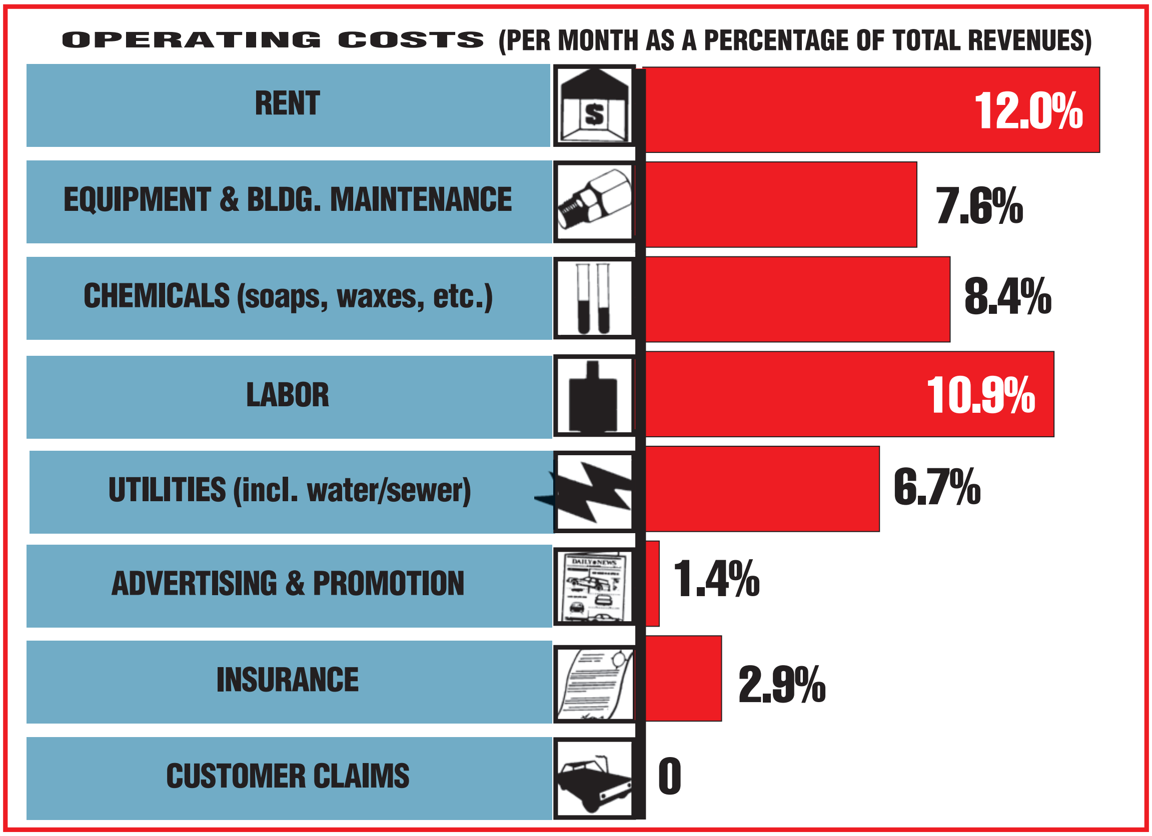
	WINTER	SPRING	SUMMER	FALL
Pacific	18	20	42	21
Mountain	*	*	*	*
Midwest	26	22	30	21
Central	36	22	23	19
South Central	26	29	22	23
Southeast	29	32	21	18
Mid-Atlantic	33	30	20	18
New England	32	40	16	13

NOTE: Some results do not total 100 due to rounding *Too Few Responses

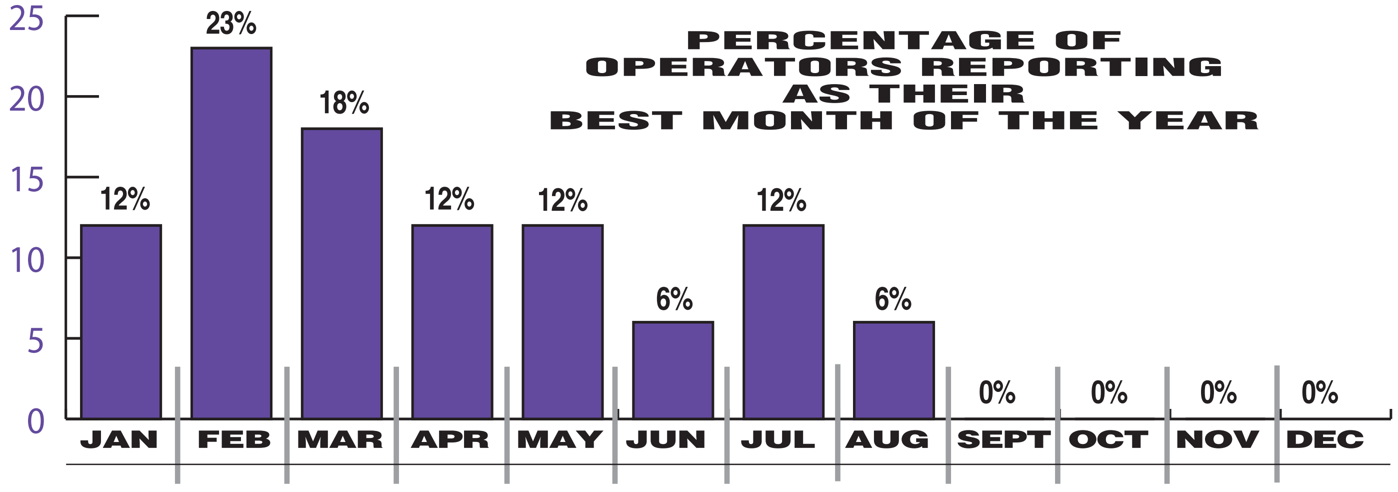


COMPETING WASHES IN AREA OVERALL

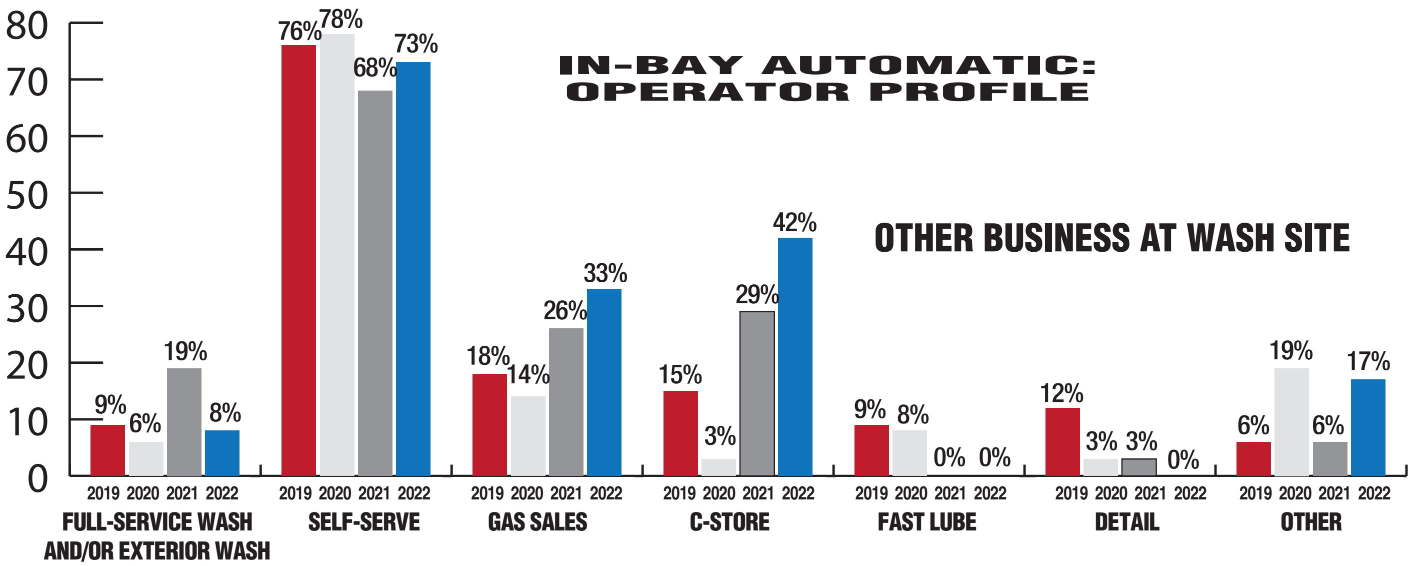




PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR

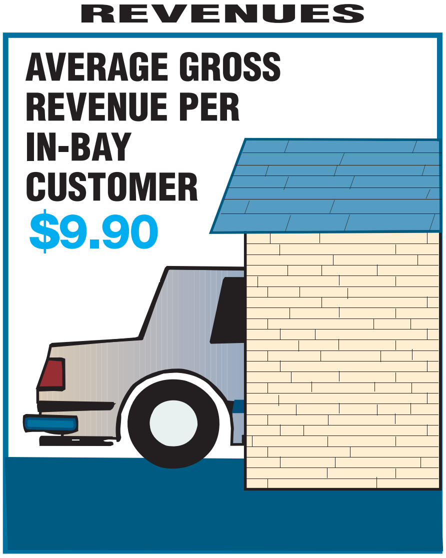


IN-BAY AUTOMATIC: OPERATOR PROFILE

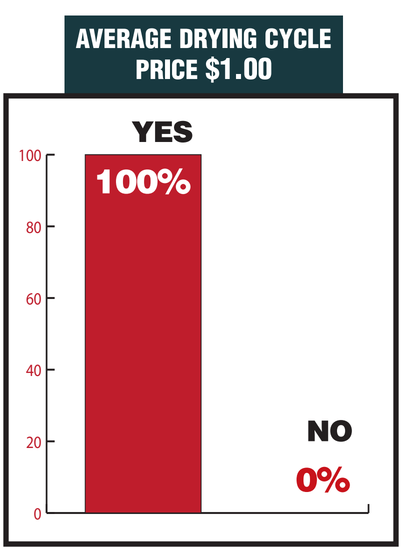


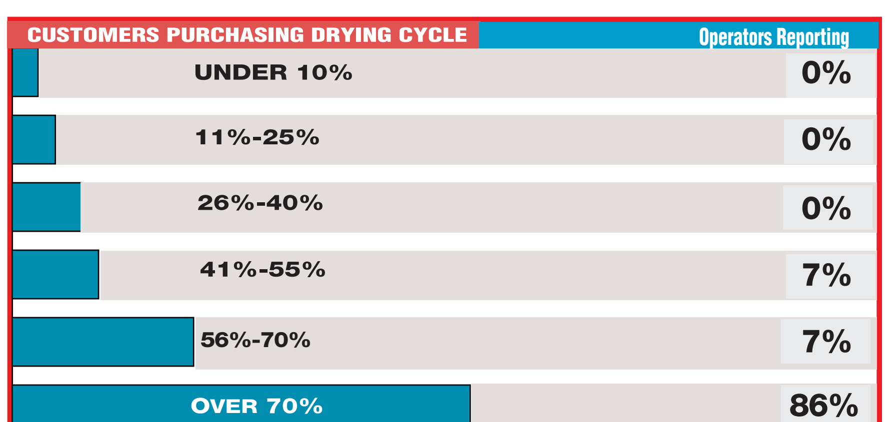
LABOR COSTS

AUTOMATIC REVENUES

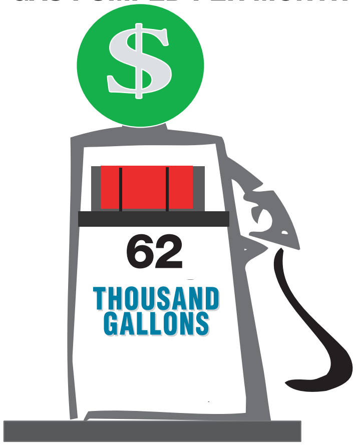


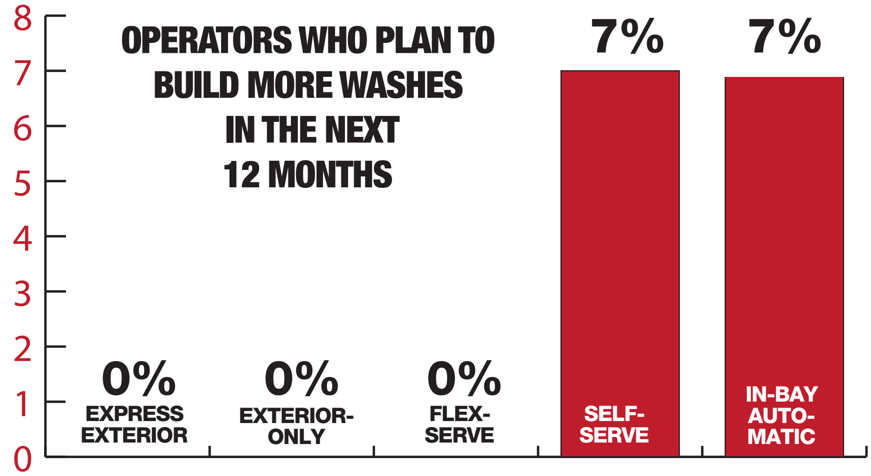
DRYING CYCLE OFFERED



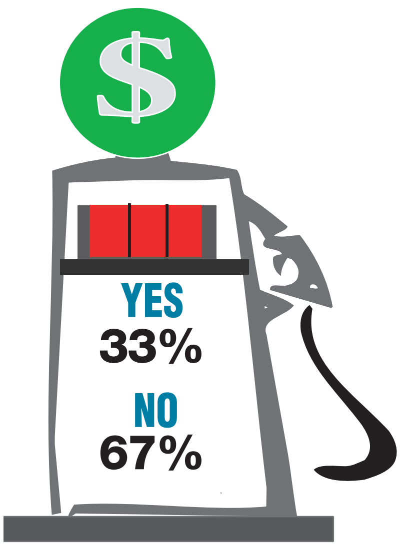


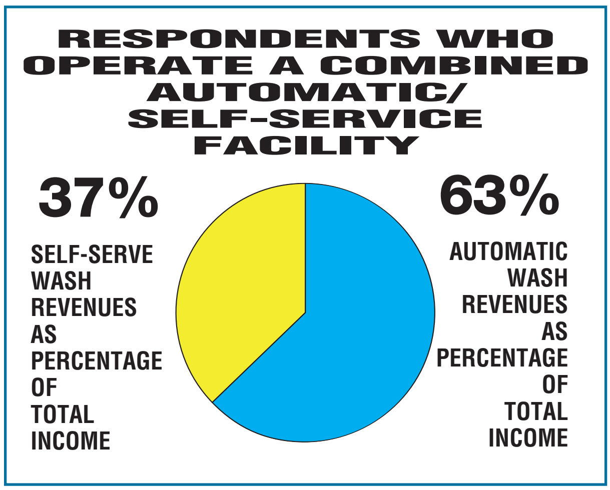
AVERAGE GALLONS OF GAS PUMPED PER MONTH



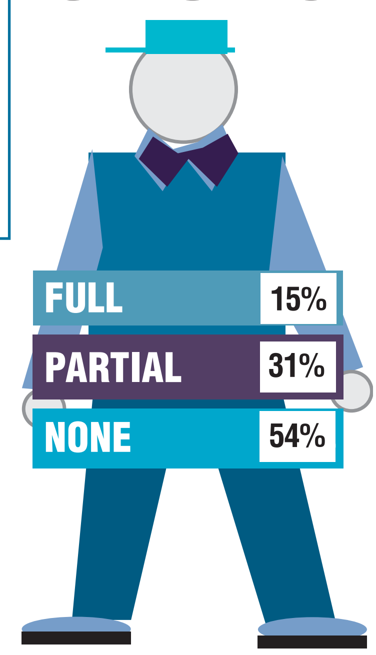


OPERATORS SELLING GASOLINE





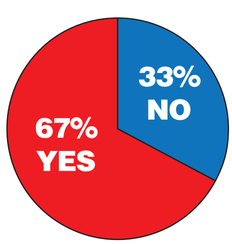
EMPLOYEE UNIFORMS



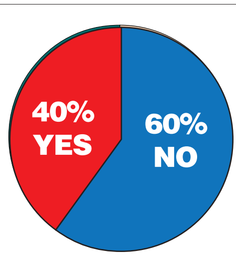
AVERAGE MONTHLY GROSS INCOME PER SELF-SERVE BAY

$2,200

EXPRESS EXTERIOR



Present in Market Area



Has Hurt Business

AVERAGE NUMBER OF CARS WASHED ANNUALLY PER AUTOMATIC

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Respondent Profile

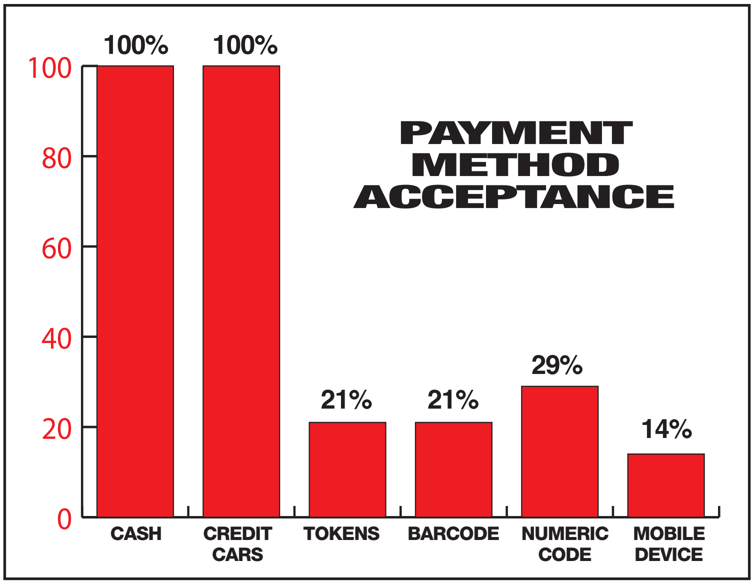
Tables 1 and 2 (below) offer year-by-year comparisons of operator experience levels and multiple site ownership.

Table 1

Length of Experience	2022	2021	2020	2019
Under 5 years	14%	6%	11%	9%
5 - 10 years	14%	13%	14%	9%
11 - 20 years	21%	29%	39%	38%
Over 20 years	50%	52%	36%	44%

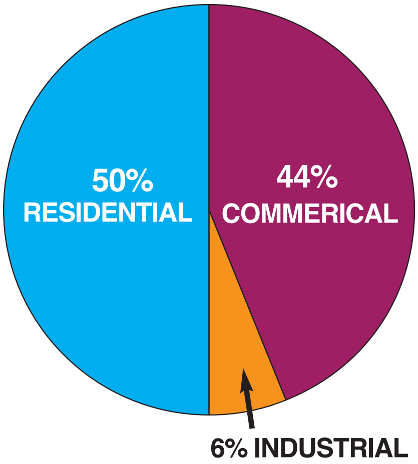
Table 2

Site Ownership	2022	2021	2020	2019
Own 1 Site	67%	63%	67%	56%
Own 2 sites	7%	17%	17%	23%
Own 3 sites	7%	7%	5%	6%
Own 4 or more sites	20%	14%	11%	15%



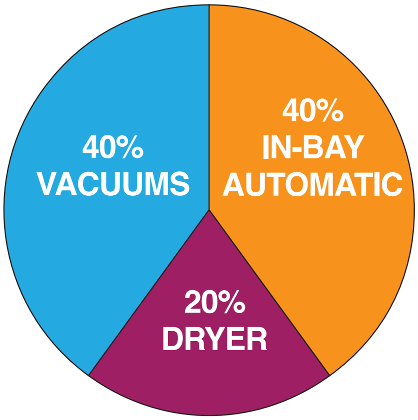
CONVEYOR REVENUES

NATURE OF WASH LOCATION

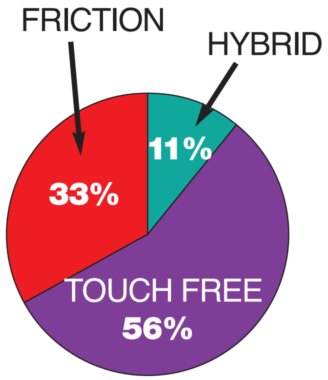


PLANNED EQUIPMENT PURCHASES

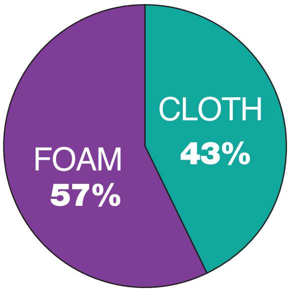
(As a percentage of equipment total)



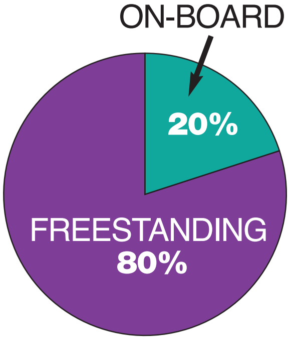
EQUIPMENT



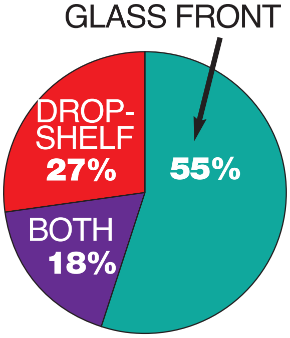
TYPE



FRICTION WASH MATERIAL



DRYER TYPE



VENDING MACHINES