

Results From The Auto Laundry News

2011 Detail Survey

The 2011 *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 107 respondents from across the United States.

RESPONDENT POOL PROFILE

For comparative purposes, respondents are, 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. The categories break down as follows:

Detailer Type	% of Total
Freestanding	37
Car Wash Combo	44
Mobile Services	11
Other Combo	8

PERFORMANCE

Not good, but better. That best sums up the results from the current survey. While still too few respondents (37 percent overall) report generating more income than in the previous year, that figure is a substantial improvement over the 27 percent who reported growth last year. There is also improvement with regard to those who report less income than in the previous year — 32 percent in the current survey compared to 44 percent last year. Freestanding shops fared the best of all the categories with 43 percent reporting growth and only 18 percent declines. The comparable percentages for Car Wash Combos are 37 and 36, for Mobile Services 25 and 42, and for Other Combos 37 and 50.

SERVICES

In the current survey, headlight restoration was included for the first time on the checklist of a la carte services. A surprisingly high 46 percent of respondents offer this relatively new service. Also making its debut was the so-called “waterless car wash.” Not a single respondent reports this service as part its offerings.

FUTURE PLANS

Overall, 20 percent of respondents plan on expanding their car care businesses during the next 12 months. Freestanding shops and Mobile Services opt virtually exclusively (87 percent) for further detail operations. Car Wash Combos favor (54 percent) more car washes, with detailing, at 8 percent, bring up a distant rear.

PERCENTAGE OF DETAIL BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	16	28	33	23
Mountain	13	26	38	23
Midwest	11	33	28	28
Central	10	33	32	25
South Central	20	27	30	23
Southeast	27	28	22	23
Mid-Atlantic	16	28	33	23
New England	9	43	25	23

KEY

Pacific

Alaska-California-Hawaii-Oregon-Washington

Mountain

Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming

Midwest

Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota

Central

Illinois-Indiana-Michigan-Ohio-Wisconsin

South Central

Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas

Southeast

Delaware-Florida-Georgia-Maryland-Carolinas-Virginia-West Virginia

Mid-Atlantic

New Jersey-New York-Pennsylvania

New England

Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont

INCOME COMPARED TO LAST YEAR

37%

2010 INCOME MORE THAN IN 2009

31%

2010 INCOME SAME AS IN 2009

32%

2010 INCOME LESS THAN IN 2009

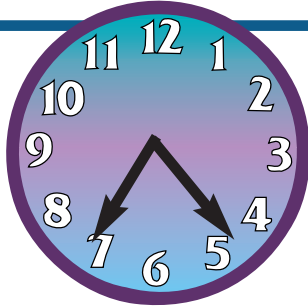
OPERATOR PROFILE

Freestanding Detail Shop	37%
Mobile Detailing	11%
Full-Service Conveyor Car Wash	33%
Exterior-Only Car Wash	17%
Self-Serve Car Wash	11%
In-Bay Automatic	6%
Oil Change/Lube	12%
Gas Station	2%
C-Store	3%

SURVEY

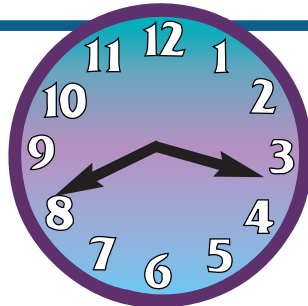
AVERAGE TIME REQUIRED TO COMPLETE STANDARD DETAIL PACKAGE

FREESTANDING



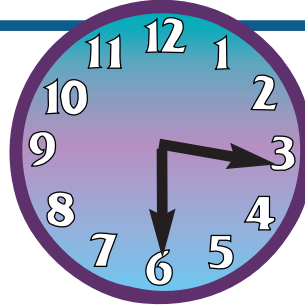
4.6 HOURS

CAR WASH COMBO



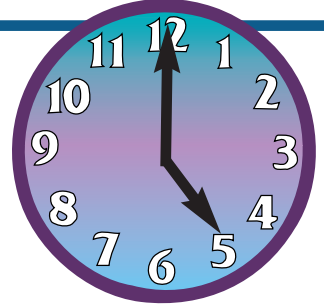
3.7 HOURS

MOBILE SERVICES



3.5 HOURS

OTHER COMBO



5.0 HOURS

DETAIL SERVICE PRICES

CHARGE FROM A FIXED-PRICE MENU

51%

CHARGE ACCORDING TO PER-CAR ESTIMATE

49%

AVERAGE NUMBER OF CARS DETAILED ANNUALLY



FREESTANDING

1,187

CAR WASH COMBO

2,375

MOBILE SERVICE

490

EMPLOYEE UNIFORMS

FULL 17%

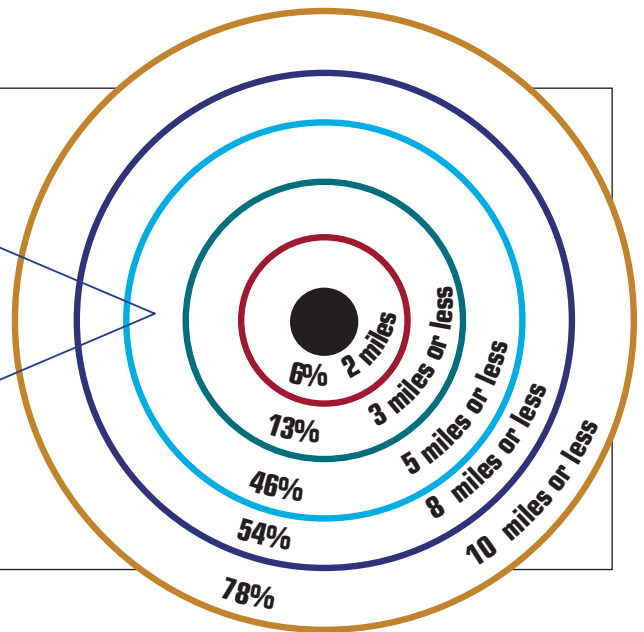
PARTIAL 55%

NONE 28%

COMPETING DETAIL SHOPS IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	5%
1	7%
2	23%
3	31%
4	13%
5	9%
MORE THAN 5	12%

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



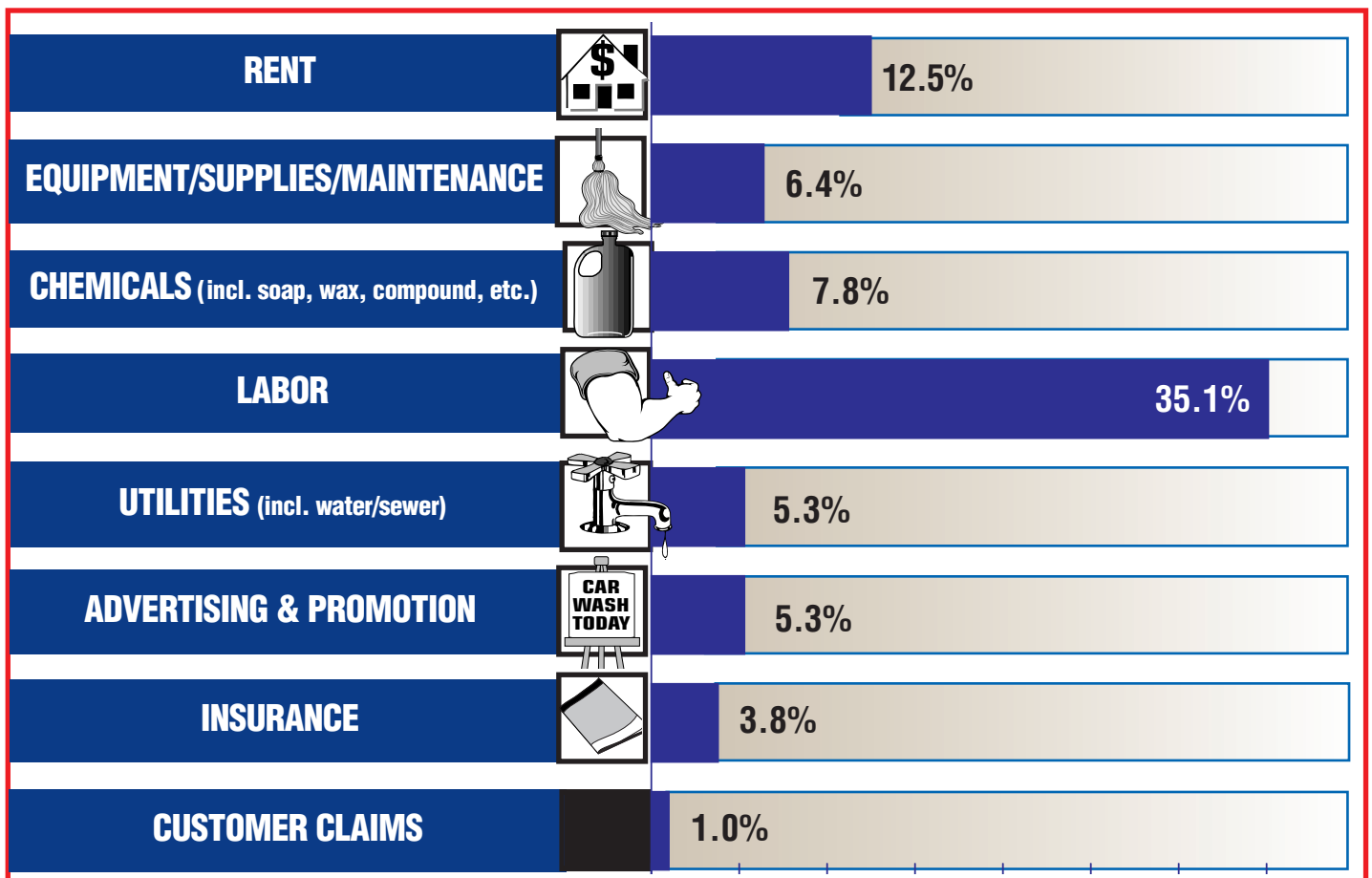
CUSTOMER PROFILE

RETAIL VEHICLE PROFILE

80% – Retail	14% – Auto Dealers
3% – Taxi/Limo	3% – Other <small>(Fleets, Body Shops, Etc.)</small>

17% – New (under 1 yr. old)	35% – 3-5 yrs. old
23% – 1-2 yrs. old	25% – 5+ yrs. old

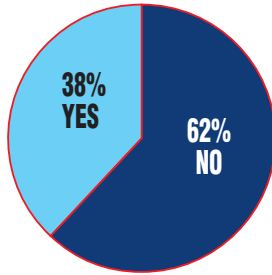
OPERATING COSTS AS PERCENTAGE OF REVENUE



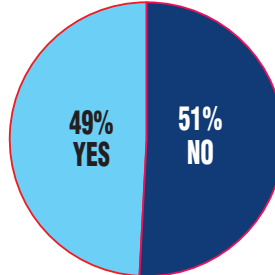
SURVEY

OFFER EXPRESS SERVICES

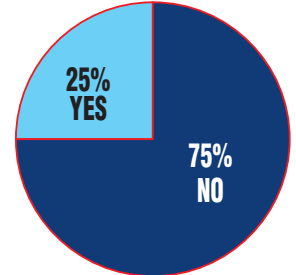
FREESTANDING



CAR WASH COMBO



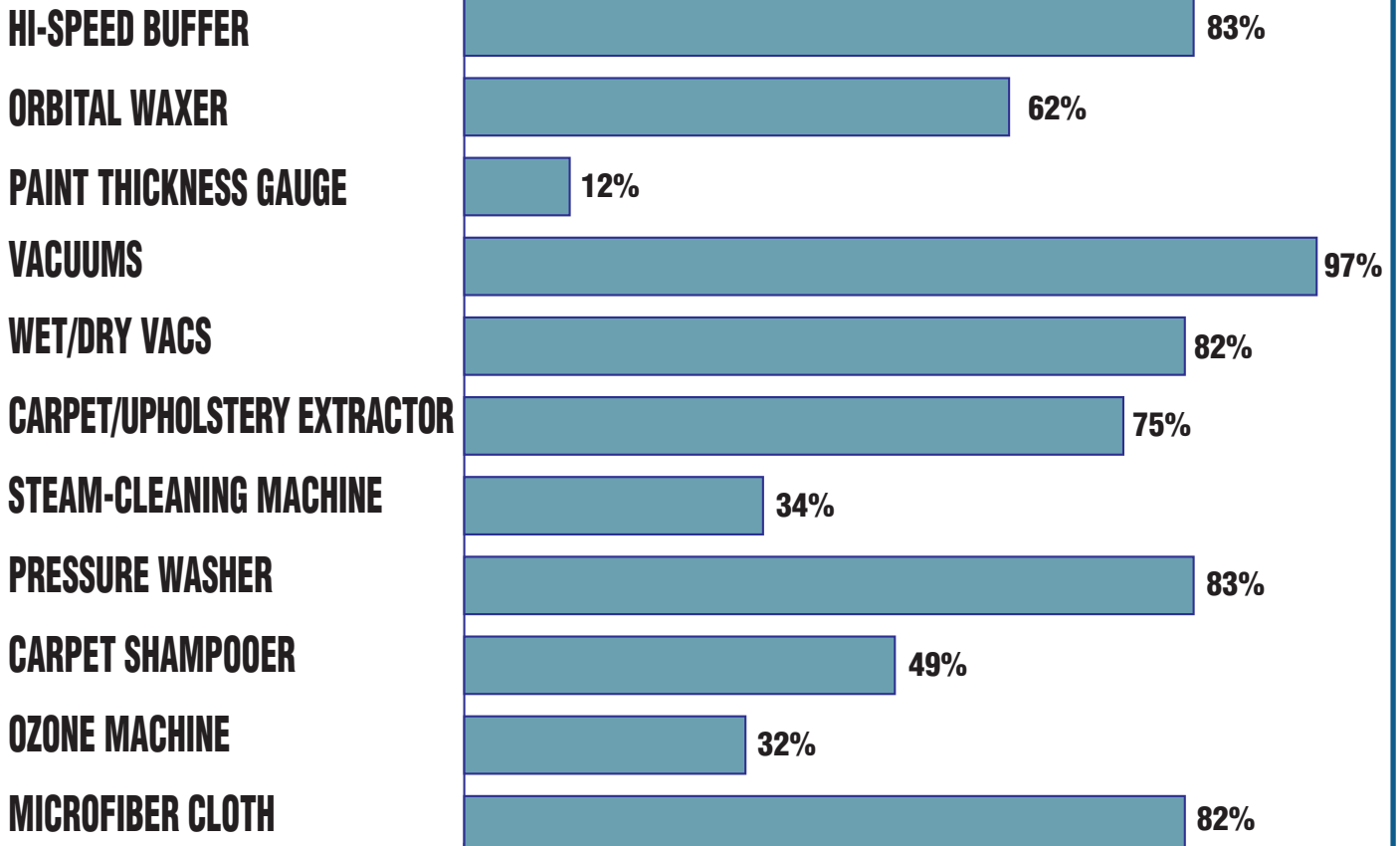
MOBILE SERVICES



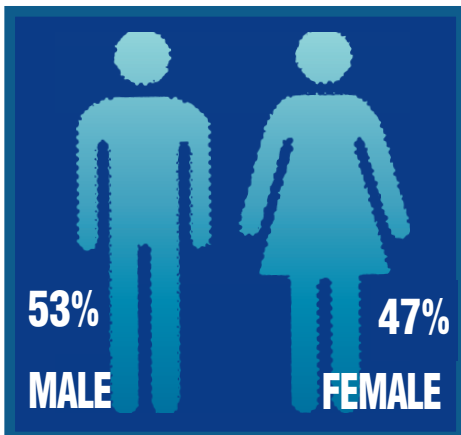
TYPE

STANDARD EQUIPMENT

■ PERCENTAGE UTILIZING

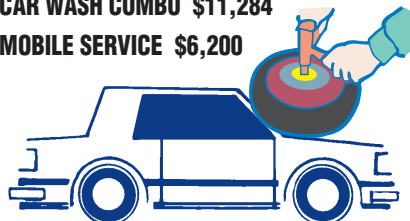


RETAIL CONSUMER PROFILE

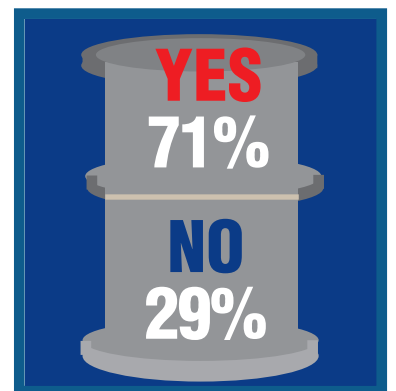


AVERAGE MONTHLY GROSS INCOME (DETAIL SERVICES ONLY)

FREESTANDING \$10,286
 CAR WASH COMBO \$11,284
 MOBILE SERVICE \$6,200



EMPLOYEE TRAINING IN SAFE CHEMICAL HANDLING

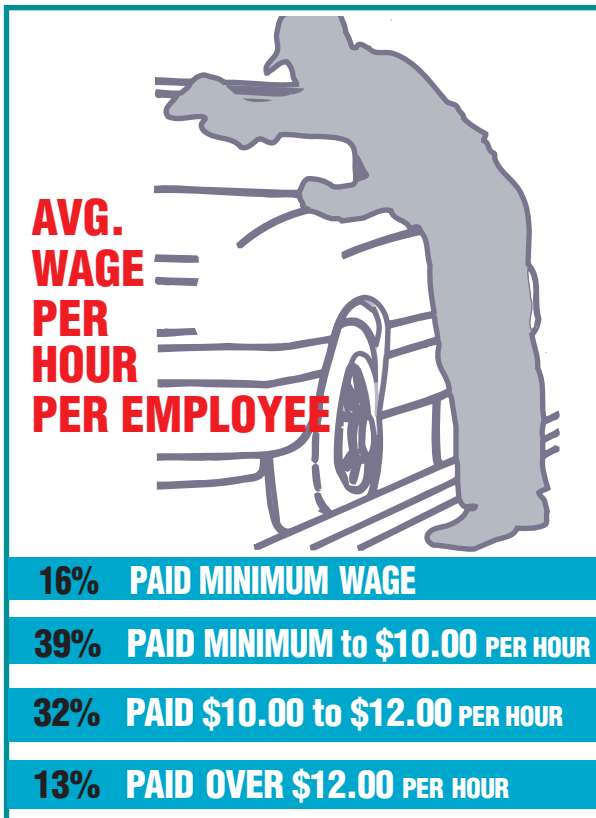


AVERAGE PACKAGE PRICES

RETAIL	FREE- STANDING	CAR WASH COMBO	MOBILE SERVICE
COMPLETE INTERIOR/EXTERIOR DETAIL	\$174.60	\$142.91	\$185.81
INTERIOR DETAIL ONLY	\$93.65	\$77.16	\$110.50
EXTERIOR DETAIL ONLY	\$96.77	\$72.03	\$116.50

WHOLESALE	FREE- STANDING	CAR WASH COMBO	MOBILE SERVICE
COMPLETE INTERIOR/EXTERIOR DETAIL	\$139.77	\$113.25	\$170.00
INTERIOR DETAIL ONLY	\$70.40	\$60.82	\$125.00
EXTERIOR DETAIL ONLY	\$74.05	\$54.50	\$140.00

LABOR COSTS



PERCENTAGE OF DETAIL BUSINESS DONE BY DAY OF THE WEEK

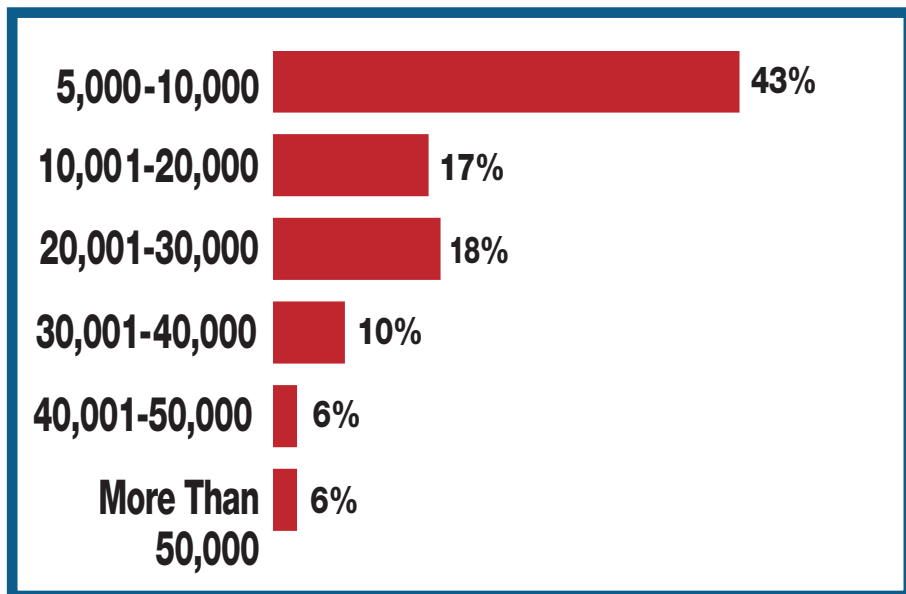
	FREE- STANDING	CAR WASH COMBO	MOBILE SERVICES
MONDAY	17	15	10
TUESDAY	17	12	15
WEDNESDAY	19	13	11
THURSDAY	17	17	14
FRIDAY	20	21	20
SATURDAY	8	18	16
SUNDAY	2	4	14

SURVEY

A LA CARTE SERVICES

SERVICE	PERCENT OFFERING OVERALL	AVERAGE PRICE	
		FREESTANDING	CAR WASH COMBO
HAND WAX	73%	\$72.59	\$43.15
MACHINE WAX/BUFF	65%	\$98.28	\$80.76
CARPET SHAMPOO	72%	\$50.83	\$46.75
UPHOLSTERY CLEANING	70%	\$53.24	\$38.85
LEATHER/VINYL (INT.) DRESSING	60%	\$23.85	\$21.74
VINYL/RUBBER (EXT.) DRESSING	56%	\$34.50	\$15.80
DEODORIZING	46%	\$42.08	\$25.50
PAINT TOUCH-UP	22%	\$43.75	\$30.00
PAINTLESS DENT REMOVAL	14%	\$98.57	\$80.00
WINDSHIELD REPAIR	17%	\$55.00	\$38.33
EXTENDED UPHOLSTERY PROT.	33%	\$49.82	\$39.17
EXTENDED PROT. PAINT SEALANT	27%	\$116.56	\$108.00
HEADLIGHT RESTORATION	46%	\$64.85	\$62.07
ENGINE CLEANING	56%	\$32.50	\$33.19
WINDOW TINTING	10%	\$175.00	\$188.33
PINSTRIPING	19%	\$66.38	\$82.50

DAILY TRAFFIC COUNT



AVERAGE GROSS REVENUE PER CAR (CAR WASH SALES ONLY)

