

# SPOTLIGHT

## Self-Serve Survey

# THE 2014 Self-Serve BENCHMARKING SURVEY REPORT

This 2014 survey is made possible by the owner/operators who took the time to answer the online survey during the months of October, November and December of 2013.

Own/operate or manage		
Number of locations		Locations include self-serve bays
1-5	93.5%	95.7%
6-10	5.4%	4.3%
11-15	1.1%	0.0%
16-20	0.0%	0.0%
20+	0.0%	0.0%

## Tokens Offered



**37%**   **63%**

## Nearest self-serve competitor

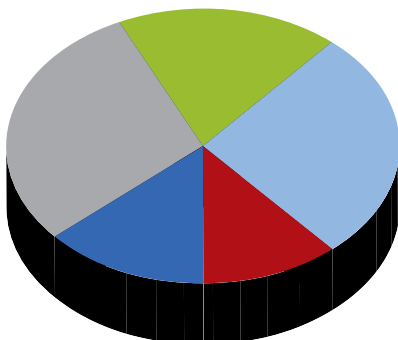
Less than ¼ mile.....	2.3%
¼ to 1 mile .....	29.5%
1.1 to 2 miles .....	27.3%
2.1 to 5 miles .....	15.9%
5.1 to 10 miles .....	15.9%
More than 10 miles .....	9.1%

**90%** of Self-Serves **ARE OPEN**  
**7 days a week.**

## Hours Open

12-16.....	20.4%
16-20.....	7.5%
20-24.....	72.0%

## Security camera system is in place



No.....	27.3%
Yes, 1 camera.....	11.4%
Yes, 2-5 cameras.....	13.6%
Yes, 6-10 cameras.....	29.5%
Yes, 11+ cameras.....	18.2%

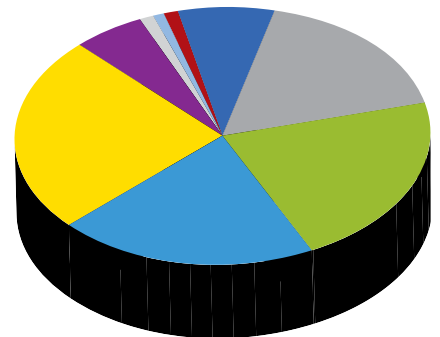
## Additional services offered

Gas	11.8%
Convenience store	12.9%
Detailing	21.5%
Coin laundry	7.5%
Lube	7.5%
Lobby items	9.7%
Pet wash	12.9%
Self-storage	4.3%
Ice vending	5.4%
None	41.9%
Other	15.1%

## Revenue Comparison

First two quarters	2013 vs. 2012
Increased	51.4%
Decreased	22.9%
Stayed the same	25.7%

## Location was built in...



Before 1950.....	1.1%
1950-1959.....	1.1%
1960-1969.....	7.5%
1970-1979.....	17.2%
1980-1989.....	21.5%
1990-1999.....	20.4%
2000-2009.....	24.7%
2010-2012.....	5.4%
2013.....	1.1%

## Vending

Products/services	
Liquid fragrances	37.6%
Pre-packaged air fresheners	76.3%
Protectant	72.0%
Carpet/upholstery	25.8%
Towels	83.9%
Window cleaner	79.6%
Snacks/soda	31.2%
Air	19.4%
None of the above	9.7%
Other	2.2%
Number of vending machines	
0	10.8%
1	20.4%
2	15.1%
3	10.8%
4	15.1%
5	7.5%
6 or more	20.4%

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## Self-Serve Survey

### For a self-serve bay, what is the...

Start-up price.....	\$2
Price per cycle .....	\$2.29
Minutes per cycle.....	4.9 mins.

### For a vacuum, what is the...

Start-up price.....	\$1.79
Price per cycle .....	83 cents
Length of cycle.....	4.1 mins.

### What is the average monthly revenue per self-serve bay?

Average answer based on all responses: .....	\$4,303
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### What is your average monthly revenue per individual vacuum?

Average answer based on all responses: .....	\$298
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### What is your average monthly gross revenue from all vending machines?

.....	\$465
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### What is the average monthly gross revenue of a single in-bay automatic?

.....	\$ 5,821
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### What is the estimated population in this area?

.....	70,203
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### What is the average daily traffic count for this location?

.....	28,040
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### Balance sheet for this typical location

Cash sales .....	41%
Bank loans .....	14%
Land and building .....	20%
Owner equity.....	21%
Other.....	5%

### What is your 2013 (estimated) personal income from your self-serve?

.....	\$41,4688
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### What is the average wage of attendants at this carwash?

.....	\$10.29
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### The total amount of cash lost to theft (of any kind) in the last 12 months.....

.....	\$716
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### The approximate annual costs of each of the following items for this location.

Water .....	\$6787
Sewer .....	\$4233
Fuel .....	\$1819
Electricity.....	\$275,917
Phone (including cellular) .....	\$1245
Pit cleaning .....	\$1267
Waste hauling .....	\$1108
Attendants.....	\$22,531
Replacement parts.....	\$6870
Soap .....	\$5188
Wax .....	\$897
Degreaser/tire cleaner.....	\$676
Property and liability insurance.....	\$2928
Property taxes.....	\$8996
Damage claims.....	\$2709
Vandalism.....	\$990
Advertising/promotions.....	\$5513

### What was the total revenue for all carwashes with self-serve bays in 2011? (Include income from gasoline sales, convenience store sales, lube, automatic bays etc. at all locations having self-serve bays.) .....

\$236,054.5

### The percentage of your sales which are accounted to the following methods of payment:

Coin.....	34%
Cash.....	39%
Token.....	7%
Credit card.....	20%

### For cash/coin sales, please indicate your average total sale per self-serve bay transaction. ....

\$6.1

### If you accept tokens, please indicate your average total sale per self-serve bay transaction.....

\$7.1

### If you accept credit cards, please indicate your average credit card charge per transaction.....

\$7.9

### Considering your credit card transactions, please answer the following questions: Do you count-up or down?

Up.....	82.3%
Down.....	17.7%

### What is the minimum charge?.....

\$4.3

### In what year did you start accepting credit cards? .....

2008

### Please indicate the percent of bay revenue that credit card sales account for:.....

20%

### What percent do you pay in credit card processing?.....

3.2%





### \*Using the typical location from before, what was the total revenue of the business in 2012? .....

\$291,020.4

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### 6. How many vacuums are there at this location?

		Response Percent
1-5		61.3%
6-10		31.2%
11-15		6.5%
16-20		1.1%
21-25		0.0%
25+		0.0%

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### 10. Which of the following components or services are offered in the self-serve bays? (Choose all that apply)

	Response Percent
Time accumulators	68.8%
Water reclaim for self-serve bay	15.1%
Water heater	67.7%
RO/DI rinse	53.8%
Water softener	59.1%
Truck/RV bay	31.2%
Credit card acceptance	46.2%
Floor heat	53.8%
Last coin alert	78.5%
Credit/debit card system	43.0%
Fleet card or code system	23.7%
Loyalty card or code system	16.1%
Metal halide lighting	47.3%
Fluorescent lighting	45.2%
Floormat cleaners	22.6%
None	1.1%
Pre-soak	84.9%
<b>Spray wax</b>	<b>87.1%</b>
Tire/engine cleaner	75.3%
Spot-free	67.7%
Foaming brush	83.9%
Cash/coin acceptance (in the self-serve bay)	75.3%
Credit card acceptance (in the self-serve bay)	38.7%
Dryer (in the self-serve bay)	23.7%
Vacuum (in the self-serve bay)	22.6%
Vending (in the self-serve bay)	24.7%
None	4.3%
Other, please specify	4.3%







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### 20. How many in-bay automatic machines are at your typical self-serve carwash?

		Response Percent
0		32.3%
1		38.7%
2		24.7%
3		1.1%
4		2.2%
5		0.0%
6 or more		1.1%

### 22. What is your approximate market radius in miles?

		Response Percent
1-5		45.5%
6-10		31.8%
11-15		6.8%
16-20		4.5%
21-25		4.5%
25+		6.8%

### 24. How would you best classify the demographic and income level of your typical customer?

		Response Percent
Urban Lower Class		9.1%
Urban Middle Class		13.6%
Urban Upper Class		2.3%
Suburban Lower Class		6.8%
<b>Suburban Middle Class</b>		<b>40.9%</b>
Suburban Upper Class		4.5%
Rural Lower Class		4.5%
Rural Middle Class		18.2%
Rural Upper Class		0.0%

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### 25. What is the speed limit (mph) outside this location?

	Response Percent
25 mph or less	18.2%
26-30 mph	18.2%
31-35 mph	25.0%
36-40 mph	25.0%
41-55 mph	13.6%
More than 55 mph	0.0%

### 27. How many other self-serve washes operate in your market radius?

	Response Percent
0	13.6%
1-5	79.5%
6-10	4.5%
11-15	0.0%
16-20	0.0%
20+	2.3%










### 29. What are the total expenses as a percentage of gross sales (excluding debt service) at this location?

	Response Percent
0	2.3%
1-9	4.5%
10-19	13.6%
20-29	11.4%
30-39	20.5%
40-49	11.4%
50-59	18.2%
60-69	11.4%
70-79	4.5%
80-89	2.3%
90-100	0.0%




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### 30. What is the debt service (principal and interest) as a percentage of gross sales at this location?

		Response Percent
0		27.3%
1-9		13.6%
10-19		15.9%
20-29		20.5%
30-39		4.5%
40-49		4.5%
50-59		9.1%
60-69		2.3%
70-79		2.3%
80-89		0.0%
90-100		0.0%








### 40. Was this an increase or decrease over revenue for this location in 2011?

		Response Percent
Increase		45.7%
Decrease		31.4%
Remained the same		22.9%








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### 43. How many full-time employees does this carwash have (excluding its owner)?

		Response Percent
0		47.7%
1		22.7%
2		11.4%
3		11.4%
4		0.0%
5		2.3%
6		2.3%
7		0.0%
8		0.0%
9		2.3%
10		0.0%

### 44. How many part-time employees does this carwash have (excluding its owner)?

		Response Percent
0		27.3%
1		38.6%
2		15.9%
3		9.1%
4		0.0%
5		2.3%
6		2.3%
7		4.5%
8		0.0%
9		0.0%
10		0.0%



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### 46. What are the labor expenses as a gross percent of sales for this carwash?

	Response Percent
0	15.9%
1-9	27.3%
10-19	25.0%
20-29	18.2%
30-39	6.8%
40-49	2.3%
50-59	4.5%
60-69	0.0%
70-79	0.0%
80-89	0.0%
90-100	0.0%

### 47. Which of the following crimes have you or your wash experienced in the last 12 months? (Choose all that apply)

	Response Percent
Employee theft	11.4%
Non-employee theft	22.7%
Vandalism	38.6%
Violent crime	2.3%
None	45.5%
Other, please specify	0.0%

### 49. Do any of your self-serve carwashes utilize a security camera system?

	Response Percent
No	27.3%
Yes, 1 camera	11.4%
Yes, 2-5 cameras	13.6%
Yes, 6-10 cameras	29.5%
Yes, 11+ cameras	18.2%