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2002 Cost of Doing Business Report

Produced by the International Carwash Association



Conducted by
International Carwash Association Inc., Market Research & Statistics Department

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Dear Reader:

The International Carwash Association is pleased to present the results of the 2002 Cost of Doing Business Report. This report is a follow up of the 1998 and 2000 reports that provide quantifiable data to the expense and revenue sources of our industry. As an industry driven, membership organization, the International Carwash Association has made a commitment to provide the professional care industry with information designed to assess the variety of business practices and procedures within our industry.

Do you have the ability to recognize, understand and quickly adapt practices that will improve the efficiency of your business? Fluctuating economic conditions require business owners to be knowledgeable to make nimble business decisions. The evolution of this study has been designed in a way that can be used to benchmark best management practices and procedures. Benchmarking studies are tools that help current or future owner/operators gauge their business practices against the rest of the industry. Now more than ever, we need to be prepared for all shifts in business. This study will help prepare for future opportunities and provide metrics for proactive decisions based on industry trends.

This tool is designed to improve your business process. Benchmarking is the art of learning from businesses that perform particular tasks better than others. Continual trends show industry additions such as profit centers, increased number of cars washed, as well as overall profitability. In several instances, where industry profit centers were also available, car washing was not reported as the primary source of revenue for operators.

The International Carwash Association is committed to serving as the source of accurate information for the car care industry. As with all of our programs, our greatest resource is you, the industry member. This research can only improve with your continued participation. If you have any questions about the contents of this report, please contact the International Carwash Association via our new interactive website, www.carcarecentral.com, or email by ica@smithbucklin.com.

Sincerely,

A handwritten signature in black ink, appearing to read "Mark O. Thorsby". The signature is fluid and cursive, with a large, sweeping flourish at the end.

Mark O. Thorsby, CAE
Executive Director
International Carwash Association

2002 Cost of Doing Business

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Methodology

Methodology

This study, conducted on behalf of the International Carwash Association membership, was designed to assess the variety of business practices and policies within the professional car wash industry. This study was first conducted in 1998 and then again in 2000; designed to serve as a benchmark for subsequent years. Throughout this report, comparisons with the 1998 and 2000 results were made when possible. In order to meet the changing needs of the membership, however, the survey was revised from previous versions and the respondent bases are not the same. For these reasons, some comparisons could not be made.

We intend for this benchmarking report to serve as a tool to help current and future business owners/operators gauge their business practices against the industry averages. All efforts were made to show the data in a way that is both useful and representative of the respondents that participated. We thank those who took the time to assist us in this data gathering effort.

The information contained in this report is a summary of the data collected. Additional analysis and cross-tabulations can be produced upon request for a minimal additional fee. If you would like to request additional information, please contact:

International Carwash Association Headquarters, 401 North Michigan Avenue, Chicago, IL 60611
Toll free: 888.ICA.8422, Tel: 312.321.5199, Fax: 312.245.1085

Sampling

Separate comprehensive surveys were designed to address the business practices of each of the four operator segments of the International Carwash Association: conveyor, in-bay automatic, professional detailers and self-service car segments. Both a hardcopy and an online version of each type of questionnaire were developed in order to provide the membership with multiple ways for participating in the study. In June of 2003, a solicitation greeting along with the online survey link and hardcopy of the questionnaire were e-mailed to all of the operator members of the Association. In an effort to increase the response rate, non-respondents were contacted and follow-up telephone interviews of the survey were conducted. Potential respondents were given until December of 2003 to respond to the survey.

The table below shows the number of people asked to participate (i.e., sample population), the number of questionnaires received from each operator segment (i.e., sample size) and the corresponding number of people who actually did participate (i.e., response rate).

	Sample Population	Sample Size	Response Rate
Conveyor car washes	509	97	19%
In-Bay Automatic car washes	103	16	15%
Self-Service car washes	311	83	27%
Professional Detailers	37	7	19%

Due to its sample population, data and statistical comparisons were not shown for the professional detailers segment in this study.

How to Read This Report

The 2002 International Carwash Association Cost of Doing Business Report is a summary of the data collected and describes the most important highlights of the research findings. The report is divided into five sections: Respondent Profile, Study Highlights, Conveyor Car Washes, In-Bay Automatic Car Washes and Self-Service Car Washes. Each section of the report includes in-depth tables and graphs to display the statistical results. Copies of all surveys are included in the appendix at the end of the report.

The Respondent Profile section provides overall demographic information on the survey respondents. The Study Highlights identifies key findings of the questionnaire results. Summarization comparing data collected from each car wash segment are presented in this section. The following sections present detailed survey results for each of the respective car wash questionnaires.

Methodology

How to Read This Report – continued

The following statistics are shown in the report:

- ◆ The mean is derived by totaling values for a given response category divided by the total number of responses.
- ◆ Percentages are derived by dividing the number of responses per category by the total number of responses to the survey. Percentages are shown in whole percents in the graphs and rounded to the nearest decimal in the tables.

In addition, the percentages shown in this report are based on the net response for each particular question. Some questions allowed respondents to choose more than one answer and therefore percentages showing such responses will not necessarily equal 100 percent. In addition, due to rounding, percentages may not equal 100 percent.

- ◆ The median (50th Percentile) is obtained by finding the value above and below which 50 percent of the responses lie when the values are arranged in order of magnitude.
- ◆ Lowest/Minimum – Lowest figure reported for the given survey question.
- ◆ Highest/Maximum – Highest figure report for the given survey question.

Where no responses were received, a dash ("-") appears, indicating that no respondents selected that particular option or value. An asterisk ("*") indicates instances where there were insufficient data to report. A double asterisk ("**") indicates that the response option, value or category is not applicable to the respective study year and/or car wash segment. Open-ended (written) responses are included where relevant in each section.

In each section, data are typically displayed for all operator segments in the aggregate and for sub-categories when relevant to each particular wash category. For example, in the conveyor wash section data are shown overall and for full-service (i.e., low volume compared to high volume facilities) and exterior washes; for in-bay automatic and self-service washes, data are shown overall and for operators with and without a secondary business at the same facility.

One way to review this report is to glance through the questionnaires in the Appendix to get an idea of the types of questions asked, then consult the table of contents for the appropriate pages. The results in the report do not necessarily appear in the same order as each car wash questionnaire.

Confidentiality

The International Carwash Association's Market Research & Statistics Department is an independent, neutral third party when it conducts research studies for the Association. All survey data that is submitted by individual respondents to this survey is held in strict confidence. Under no circumstances will anyone (other than the research team) be allowed access to individually submitted data or information where it may be possible to identify individual respondents.

To avoid disclosure of individual company information in this report, aggregated data was withheld if data for less than two respondents is provided in a category. As a further precaution, individual company data will be destroyed ninety days after the distribution of this report.

Methodology

Word of Caution

This report was prepared to serve as a useful management and decision-making tool. However, the reader should keep in mind the following when reviewing this report:

- ◆ The results should be viewed as typical practices and policies that were among the International Carwash Association members and not as standards.
- ◆ The results are based on a sample of the Association's members and may vary had all members in the industry participated.
- ◆ The results of questions containing a small number of respondents may not be strongly representative of what took place among that particular car wash segment and judgment based on small samples should be made with caution.

The International Carwash Association's research team did not independently verify all the data provided by each respondent, and does not express an opinion on the results of this report.

Respondent Profile

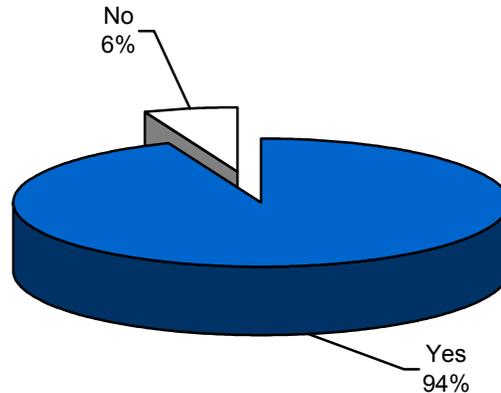
Respondent Profile

This section identifies general demographic information on the survey respondents. The following tables and graphs show respondents' affiliation with the International Carwash Association, the location of their businesses and the years in which they were built.

Association Membership

- ◆ Ninety-four percent of the respondents indicated that they were International Carwash Association members.

International Carwash Association Membership



Year Facility Built

- ◆ Survey respondents were most likely to be reporting on facilities built in the 1990s. Similar to the 2000 study, in-bay automatic operators had the most recently built facilities (1998) on average.

Period Facility Built	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-Service
1979 or earlier	25.1%	30.1%	-	23.1%
1980 – 1989	30.4%	28.9%	20.0%	33.3%
1990 – 1999	31.0%	32.5%	50.0%	26.9%
2000 to 2002	13.5%	8.4%	30.0%	16.7%
Median Year Built	1989	1988	1998	1987

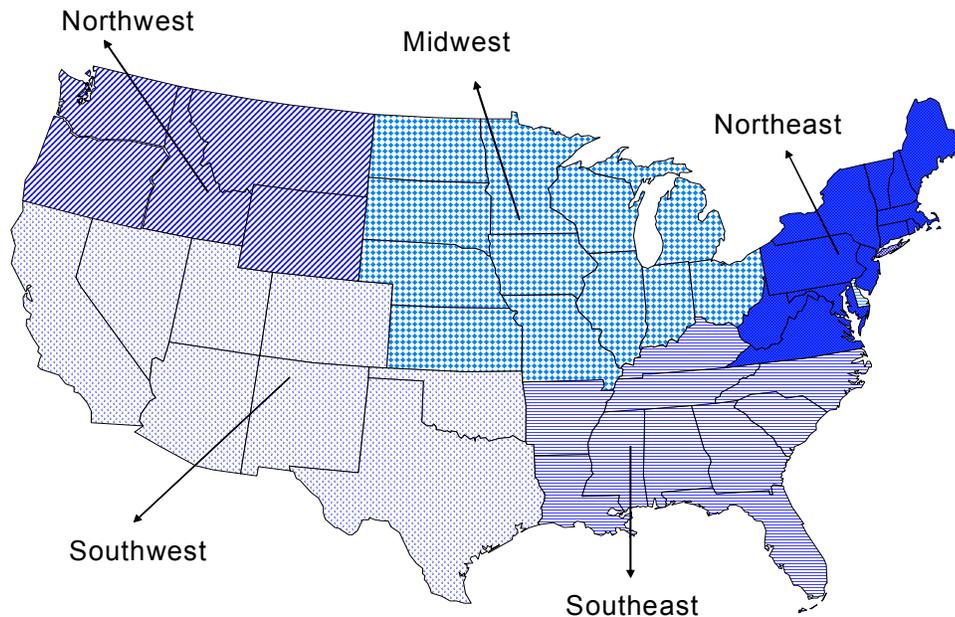
- = No data was submitted.

Respondent Profile

Where Businesses are Located

- Overall, most responding participants owned and/or operated businesses in the Midwest. However, in-bay automatic responding members were more likely to operate facilities in the Southeast region and self-service operators tended to own sites in the Southwest. Across car wash segments, the least represented region was the Northwest. The map below illustrates the five regions of the United States that were represented in this report.

Region	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-Service
Northeast	19.3%	17.7%	26.7%	19.8%
Southeast	20.3%	19.8%	33.3%	18.5%
Southwest	26.6%	19.8%	13.3%	37.0%
Northwest	3.1%	2.1%	6.7%	3.7%
Midwest	30.7%	40.6%	20.0%	21.0%



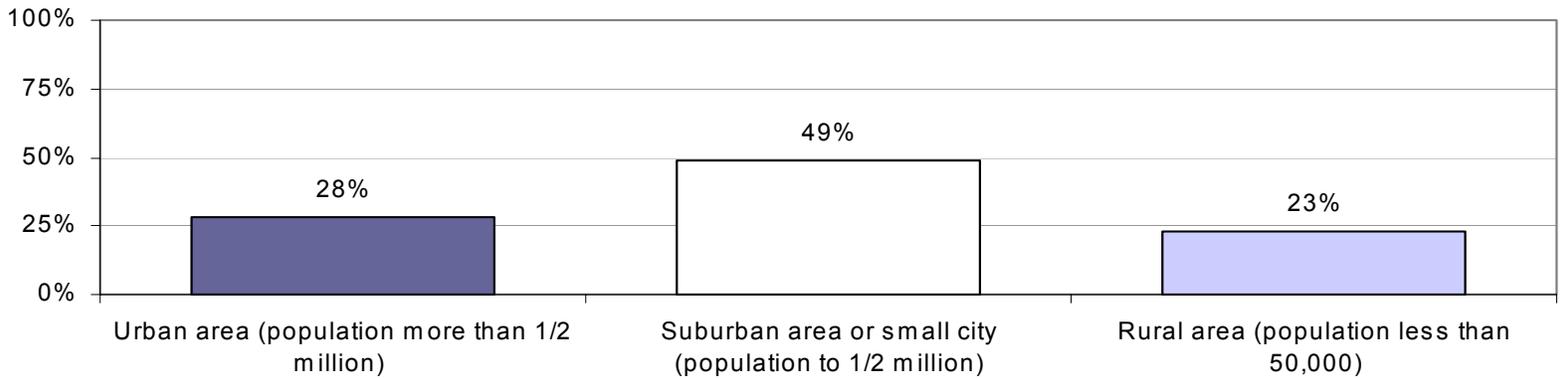
- Northeast: Connecticut, District of Columbia, Delaware, Massachusetts, Maryland, Maine, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Virginia, Vermont, West Virginia
- Southeast: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee
- Southwest: Arizona, California, Colorado, Hawaii, New Mexico, Nevada, Oklahoma, Texas, Utah
- Northwest: Alaska, Idaho, Montana, Oregon, Washington, Wyoming
- Midwest: Iowa, Illinois, Indiana, Kansas, Michigan, Minnesota, Missouri, North Dakota, Nebraska, Ohio, South Dakota, Wisconsin

Respondent Profile

Area Size

- Nationally, most of the respondents owned or operated businesses in suburban areas or small cities. Conveyor businesses (30%) were the most likely of the three industry segments to be located in an urban area. In comparison, self-service operators were more likely to own businesses in rural areas (31%).

Type of Area Business is Located



Area Size	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-Service
Urban area	28.3%	29.5%	28.6%	26.8%
Suburban area or small city	48.7%	54.7%	42.9%	42.7%
Rural area	23.0%	15.8%	28.6%	30.5%

Region	Area Size		
	Urban Area	Suburban area or small city	Rural area
Northeast	21.6%	48.6%	29.7%
Southeast	30.8%	46.2%	23.1%
Southwest	45.1%	41.2%	13.7%
Northwest	-	50.0%	50.0%
Midwest	17.5%	57.9%	24.6%

- = No data was submitted.

Study Highlights

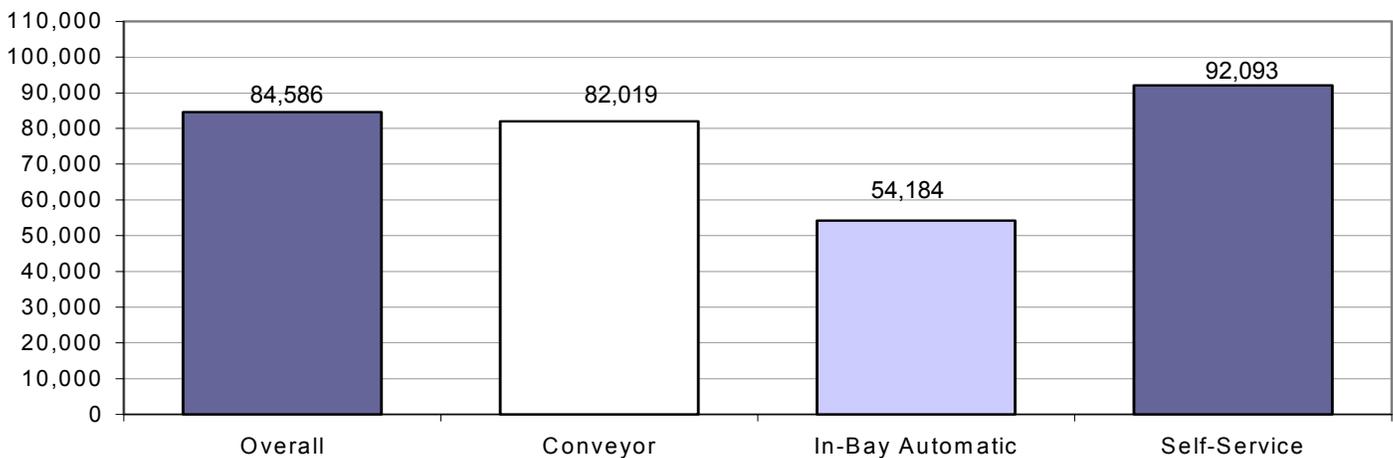
Study Highlights

In this section, comparisons between the industry segments are presented, as well as comparison with the 1998 and 2000 study when possible. However, because the Cost of Doing Business questionnaires were revised each study year and the respondent base was not the same, some comparisons could not be made. For instance, the 2002 study shows new sub-categories for some operating segments (e.g., in-bay automatic washes with secondary business and without) and comparisons using such groupings could not be made.

Number of Cars Washed

- ◆ As shown in the graph below, the average number of cars washed at a full-service conveyor in 2002 was 82,019. In comparison, 54,184 cars were washed at in-bay automatic car washes. As reported by self-service washes, an average of 92,093 cycles were sold per self-service car wash facility in 2002. The median number of cars washed or cycles sold, is provided in order to determine the midpoint for which counts were reported.

Average Number of Cars Washed in 2002



Median Number of Cars Washed:

Overall:	62,500
Conveyor:	65,109
In-Bay Automatic:	37,500
Self-Service:	67,828

- ◆ The table below shows the average number of cars washed per region by industry segment. Interestingly, while 41 percent of conveyor car washes were operated in the Midwest, significantly more cars were reportedly washed in the Southwest region. Similarly, respondents indicated that more in-bay automatic car washes were located in the Southeast region (33%), yet those businesses located in the Midwest region reported washing close to 60,000 more cars.

Average Number of Cars Washed by Industry Segment

Region	Overall	Conveyor	In-Bay Automatic	Self-Service
Northeast	90,190	84,620	62,694	105,507
Southeast	69,617	63,627	33,333	85,093
Southwest	99,700	108,692	*	96,379
Northwest	122,262	*	*	*
Midwest	74,405	78,114	94,500	62,855

* = Insufficient data to report.

Note, the Self-Service figures indicate the number of self-service wash cycles sold per region.

Study Highlights

Number of Cars Washed - continued

- ◆ In general, more cars tend to be cleaned at car washes located in urban areas than in small cities, suburban areas or rural areas. According to in-bay automatic respondents, people are more likely to wash their cars in the suburbs and small cities at in-bays than in urban or rural areas.

Area Size	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-Service
Urban area	111,536	99,797	20,138	133,717
Suburban area or small city	81,386	83,034	62,000	81,773
Rural area	56,481	48,177	23,583	66,188

- ◆ For those respondents that were unable to provide an exact figure for the number of cars washed or car wash cycles sold in 2002, they were asked to report within a range, including all paid and free car washes. The table below shows those results. While 28 percent of self-service responding owners reported selling between 25,000 to 49,999 car wash cycles in 2002, only slightly less (27%) reported selling 150,000 or more cycles.

Range of Cars Washed	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-service
Less than 25,000	6.2%	1.1%	30.0%	9.3%
25,000 – 49,999	23.2%	17.4%	40.0%	28.0%
50,000 – 74,999	26.6%	39.1%	10.0%	13.3%
75,000 – 84,999	6.2%	7.6%	-	5.3%
85,000 – 99,999	9.6%	14.1%	-	5.3%
100,000 – 124,999	9.6%	12.0%	-	8.0%
125,000 – 149,999	2.8%	2.2%	-	4.0%
150,000 or more	15.8%	6.5%	20.0%	26.7%

- = No data was submitted.

Base Price of Car Washes

Although the sample sizes varied from the 1998 and 2000 studies, comparisons can be made about general business practices and policies. The table below compares the 2002 “base prices” with the 1998 and 2000 prices. In-bay automatic car washes without gas had the greatest price increase, followed by self-service washes.

Type of Wash	2002		2000		1998	
	Average Price	% Change from 2000	Average Price	% Change from 1998	Average Price	% Change from 1996
Conveyor Wash Base Price	\$8.43	-3.3%	\$8.72	0.8%	\$8.65	**
In-Bay Wash Base Price without Gas	\$6.57	42.5%	\$4.61	10.0%	\$4.19	**
Self-Service Wash Cycle	\$1.69	34.1%	\$1.26	-1.6%	\$1.28	**

** = Not Applicable. No study was conducted in 1996.

Study Highlights

Base Price of Car Washes - continued

- ◆ Operators were asked to report on whether business last year increased, decreased or remained the same. In-bay automatic operators were more likely to report that business remained the same compared with the previous year. Even though in-bay automatic base prices increased by 43 percent since 2000, operators experienced an average percent decrease in business by 24 percent. More conveyor operators (45%) indicated that business decreased, but only by 7 percent in comparison to in-bay automatic operators. Both car wash segments experienced similar average percentage increases in 2002.

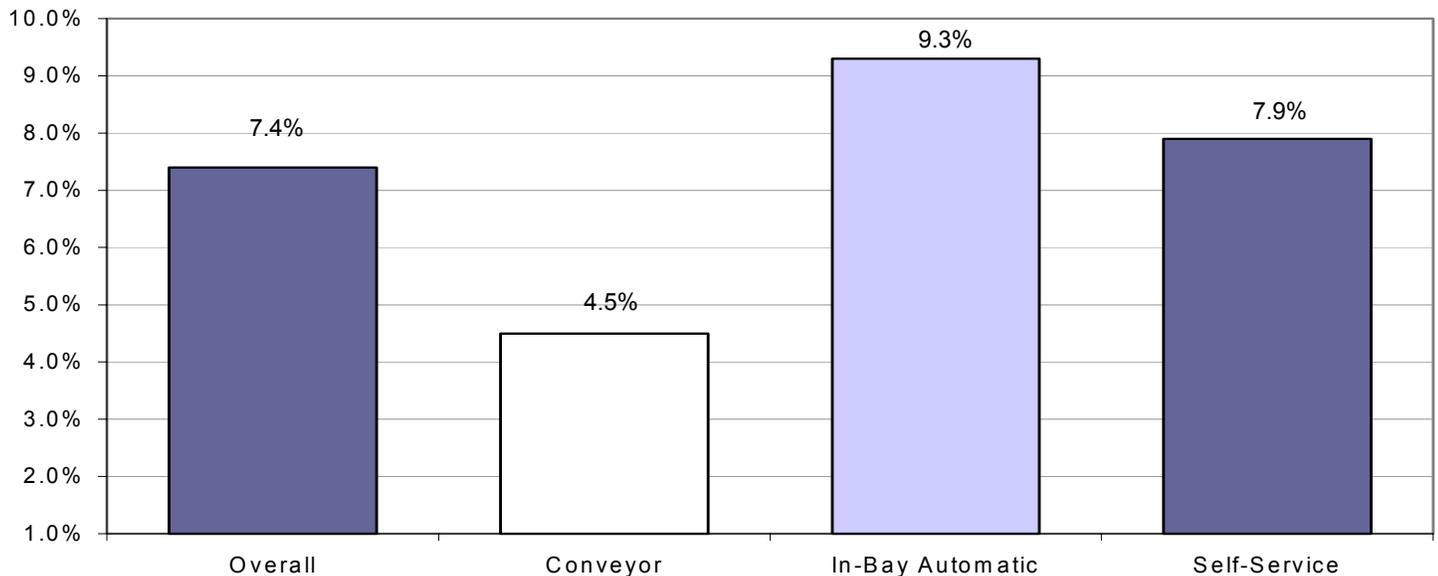
Industry Segment	Percent Reporting Increase	Average Percent Increase	Percent Reporting Remained the Same	Percent Reporting Decrease	Average Percent Decrease
Conveyor Wash	41.4%	10.8%	13.8%	44.8%	7.1%
In-Bay Automatic Wash	40.0%	10.0%	30.0%	30.0%	24.0%
Self-Service	**	**	**	**	**

** = Not Applicable. Response not requested in survey.

Capture Rate

- ◆ According to survey participants, operators captured an average of 7 percent of the traffic that passed by their businesses. Capture rates were the highest amongst in-bay automatic operators followed by self-services owners. In comparison, conveyor operators reported significantly lower capture rates in 2002.

Capture Rate in 2002



Study Highlights

Capture Rate - continued

- The table below shows each industry segment's annual capture rate by region and the type of areas where the facility is located.

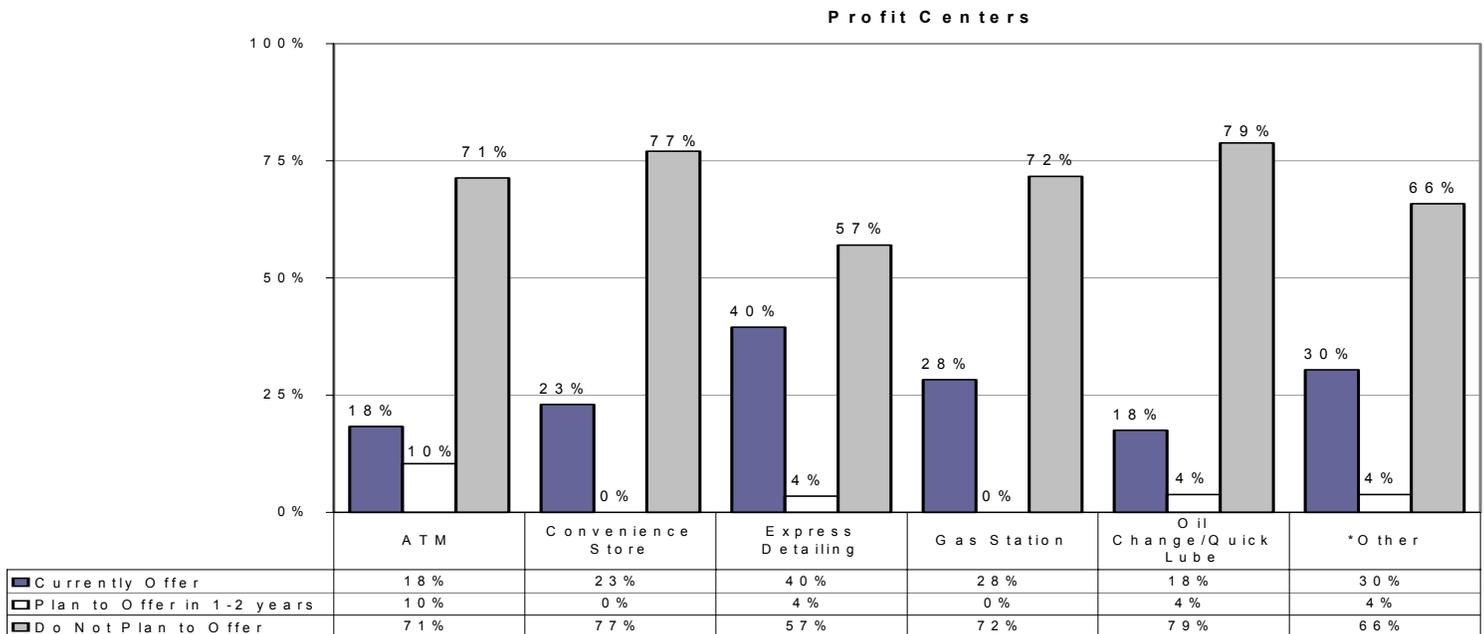
	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-Service
Region:				
Northeast	12.2%	12.8%	0.5%	14.1%
Southeast	5.8%	7.3%	-	3.9%
Southwest	5.7%	1.5%	-	7.7%
Northwest	2.0%	-	-	2.0%
Midwest	7.0%	6.4%	*	7.7%
Area Size:				
Urban area	4.5%	4.2%	-	4.9%
Suburban area or small city	9.3%	10.6%	*	8.0%
Rural area	7.9%	5.2%	*	10.0%

- = No data was submitted.

* = Insufficient data to report.

Profit Centers

- The graph below indicates whether responding participants offered, planned to offer in one to two years or did not plan to offer the following profit centers in 2002.



*Note: A listing of "other" is presented on the following page by car wash segment.

Study Highlights

Profit Centers - continued

The listing below shows the “other” types of profit centers that were offered or intended to be offered in one to two years.

<u>Industry Segment</u>	<u>Currently Offer</u>	<u>Plan to Offer in 1-2 Years</u>
Conveyor	<ul style="list-style-type: none">- Detailing. (3 responses)- Gift shop. (2 responses)- Greeting card store in lobby. (2 responses)- Accessories.- Café.- Coffee shop.- Dog wash.- Four Self-Serve car washes.- Full detailing.- Gift shop, candy, soda, etc.- Hair salon.- Lube.- Paintless dent removal.- Sign.- Window tinting.- Self-storage at two locations.	<ul style="list-style-type: none">- No response.
In-Bay Automatic	<ul style="list-style-type: none">- Five locations have quick serve restaurants.- Fast food, not a national brand.- Vending and vacuum.- Vendor (e.g., Coke, etc.).	<ul style="list-style-type: none">- No response.
Self-Service	<ul style="list-style-type: none">- Laundry and electrical services.- Fast Food Stand.	<ul style="list-style-type: none">- Self storage.- Drive through automatic- Considering some finishing touches type detailing-exterior only.

Study Highlights

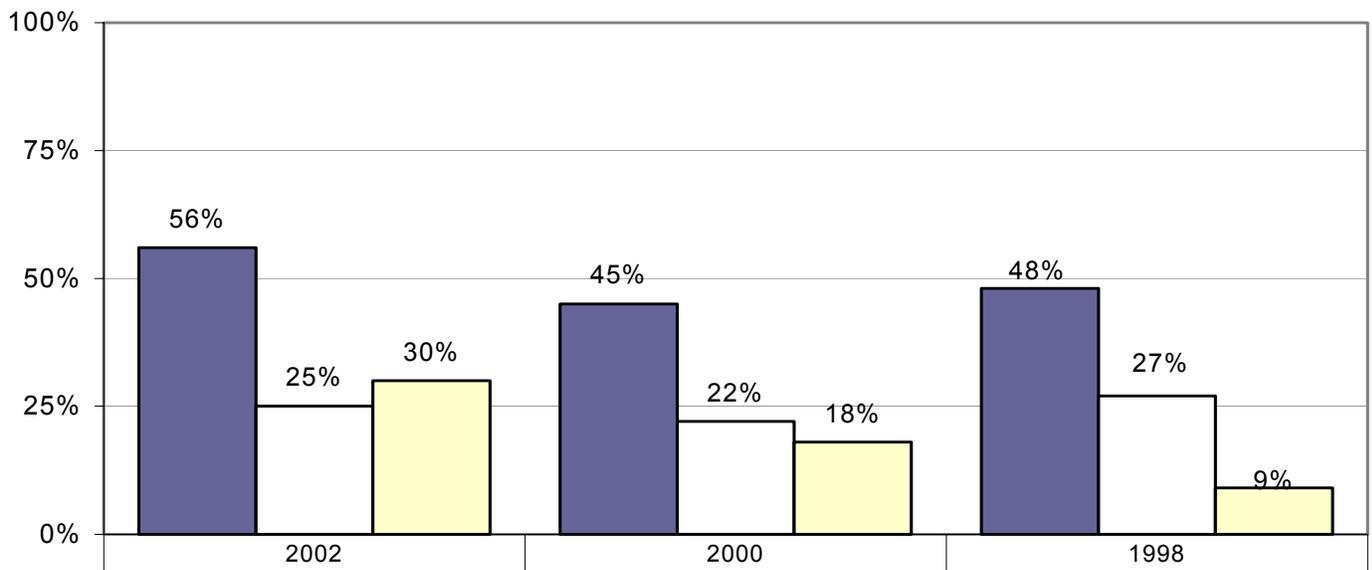
Water Recycling

- Similar to the 1998 and 2000 studies, conveyor operators in 2002 (56%) had the highest percentage of respondents recycling water. In 2002, about 20 percent recycled more than 50 percent of the water they used. In comparison, most responding in-bay automatic (75%) and self-service (70%) facilities did not recycle water in 2002. Of those that do, more recycle between one and 10 percent of water than any other recycling range. However, more in-bay (25%) and self-service (30%) facilities recycled water in 2002 than in 1998 and 2000.

Recycling Ranges	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-service
1% to 10%	13.9%	15.4%	16.7%	11.4%
11% to 20%	2.3%	2.2%	-	2.9%
21% to 30%	6.4%	7.7%	-	5.7%
31% to 40%	2.3%	3.3%	-	1.4%
41% to 50%	4.6%	6.6%	-	2.9%
51% to 75%	4.6%	5.5%	8.3%	2.9%
More than 75%	9.2%	15.4%	-	2.9%
Total - I do recycle water	43.4%	56.1%	25.0%	30.0%
I do not recycle water	56.6%	44.0%	75.0%	70.0%

- = No data was submitted.

Percent Recycling Water by Study Year



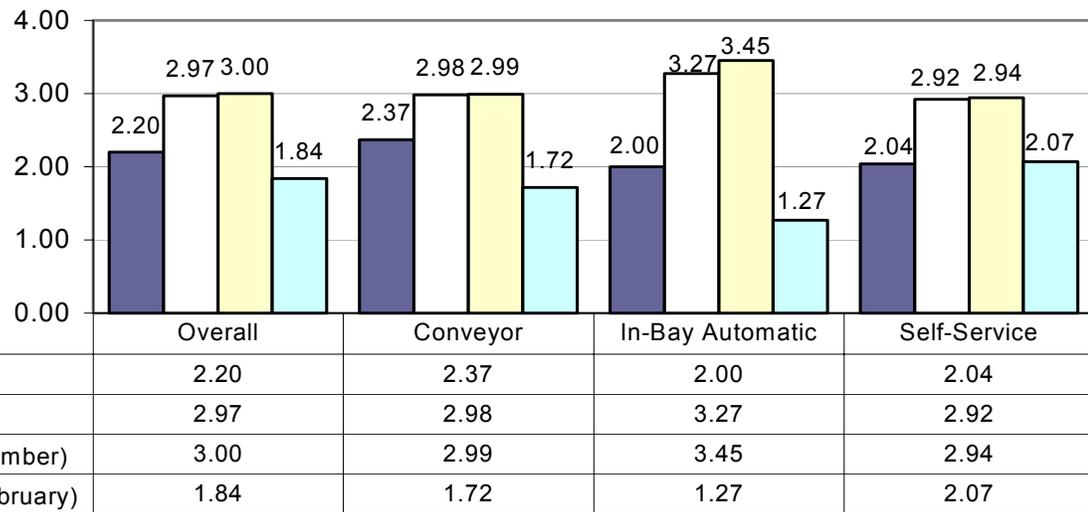
■ Conveyor	56%	45%	48%
□ In-Bay Automatic	25%	22%	27%
■ Self-Service	30%	18%	9%

Study Highlights

Most Profitable Season

- ◆ Not surprising, the majority of respondents across car wash segments indicated that their businesses were most profitable during the winter season followed by the spring. Overall, 42 percent indicated that the summer months were the least profitable for their businesses.

Most Profitable Season by Industry Segment



Scale: Profitability rated on a scale from 1 to 4 (1 being most profitable and 4 being least profitable.)

Seasons	Most Profitable 1	2	3	Least Profitable 4	Mean	Base
Spring (March, April & May)	20.0%	48.5%	23.0%	8.5%	2.20	165
Summer (June, July & August)	12.7%	20.0%	24.8%	42.4%	2.97	165
Fall (September, October & November)	4.2%	21.2%	44.8%	29.7%	3.00	165
Winter (December, January & February)	62.0%	10.8%	7.8%	19.3%	1.84	166

Scale: Profitability rated on a scale from 1 to 4 (1 being most profitable and 4 being least profitable.)

Study Highlights

Labor/Labor Expenses

- ◆ The following table indicates the average number of employees employed full-time and part-time by industry segment.

Labor	Industry Segment			
	Overall	Conveyor	In-Bay Automatic	Self-Service
Full-time Employees	11	16	1	4
Number of Full-time Hours per Week	52	65	38	35
Part-time Employees	10	15	6	3
Number of Part-time Hours per Week	33	47	20	19

- ◆ Similar to the 2000 study, conveyor operators were among the most likely to offer benefits to full-time employees.

Percent Offering Benefits to...	Benefits			
	Medical Insurance	Dental Plan	Life Insurance	Other
Conveyor Wash:				
Full-time Employees	63.5%	42.7%	36.5%	29.2%
Part-time Employees	1.0%	3.1%	-	1.0%
In-Bay Automatic Wash:				
Full-time Employees	20.0%	13.3%	*	13.3%
Part-time Employees	6.7%	6.7%	*	13.3%
Self-Service Wash:				
Full-time Employees	27.7%	12.0%	12.0%	6.0%
Part-time Employees	2.4%	-	1.2%	8.4%

- = No data was submitted.

* = Insufficient data to report.

Conveyor Car Wash Results

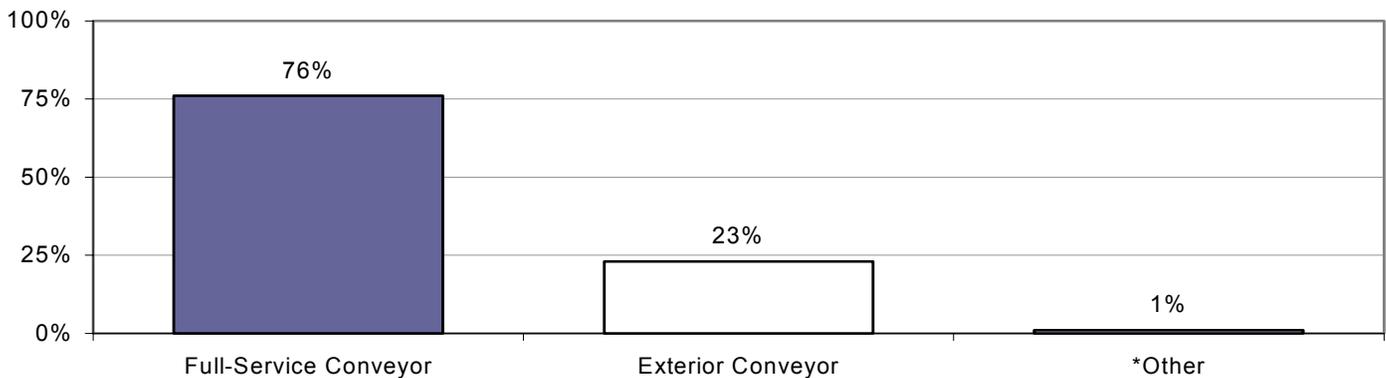
Conveyor Car Wash Results

The following section presents detailed information concerning the operation of full-service and exterior car washes. A full-service conveyor car wash is a facility that pulls a car through the wash by a conveyor and extra services such as interior cleaning and waxing are offered. Exterior conveyor car washes pull a car through the wash by a conveyor and the outside of the car is washed.

Business Profile

- Seventy-six percent of the conveyor respondents indicated that their primary business was a full-service conveyor facility. "Other" primary businesses reported included gas stations and self-services bays.

Primary Business of Facility



- The majority of respondents owned or operated one car wash. The majority of exterior conveyor operators (78%) reported that they offered detailing at the same location as their car wash.

Type of Facility	Number of Car Washes Owned/Operated			Average Number
	One	Two	Three or More	
Overall:				
Car Wash(es)	45.3%	14.7%	40.0%	3.51
Detail Shop(s) (at the same location)	66.7%	8.8%	24.6%	1.75
Detail Shop(s) (stand-alone)	-	-	-	-
*Other(s)	48.0%	44.0%	8.0%	1.92
Full-Service Conveyor:				
Car Wash(es)	44.4%	15.3%	40.3%	3.85
Detail Shop(s) (at the same location)	64.6%	10.4%	25.0%	1.77
Detail Shop(s) (stand-alone)	-	-	-	-
Other(s)	55.6%	38.9%	5.6%	1.56
Exterior Conveyor:				
Car Wash(es)	45.5%	13.6%	40.9%	2.50
Detail Shop(s) (at the same location)	77.8%	-	22.2%	1.67
Detail Shop(s) (stand-alone)	-	-	-	-
Other(s)	33.3%	66.7%	-	1.67

- = No data was submitted.

*Other (21 responses)

- Quick Lube. (9 responses)
- Lube center. (5 responses)
- Self-serve bays. (3 responses)
- Lube center at the same location. (2 responses)
- Oil change. (2 responses)
- Ten gas stations with convenience stores. One at this location.

Conveyor Car Wash Results

Business Profile - continued

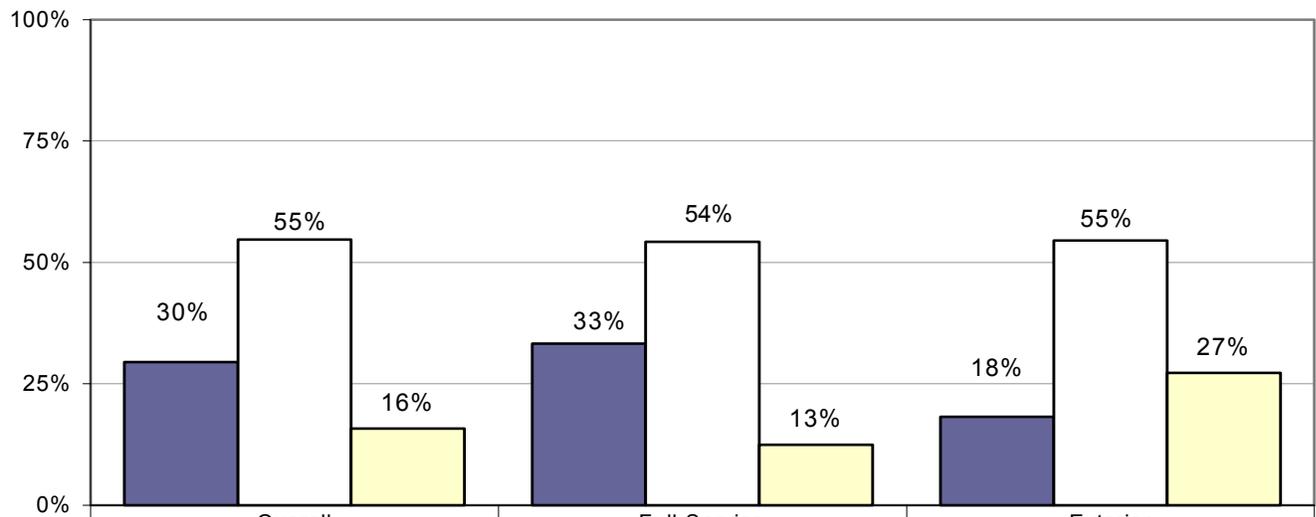
- ◆ The majority of full-service and exterior conveyors are located in the Midwest region.

Regions	Overall	Full-Service	Exterior
Northeast (CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV)	17.7%	16.4%	22.7%
Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN)	19.8%	21.9%	13.6%
Southwest (AZ, CA, CO, HI, NM, NV, OK, TX, UT)	19.8%	26.0%	-
Northwest (AK, ID, MT, OR, WA, WY)	2.1%	-	9.1%
Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)	40.6%	35.6%	54.5%

- = No data was submitted.

- ◆ Similar to the previous study, the majority of conveyor washes reported that their businesses were primarily located in suburban areas. Full-service car washes were more likely than exterior washes to be located in an urban area.

Size of Area Where Business is Located



	Overall	Full-Service	Exterior
■ Urban Area	30%	33%	18%
□ Suburban Area	55%	54%	55%
■ Rural Area	16%	13%	27%

Key: Urban area – population more than ½ million
 Suburban area or small city – population to ½ million
 Rural area – population less than 50,000

- ◆ Exterior survey respondents were most likely to be reporting on facilities built in the 1990s.

Primary Business	Period Facility Built				Median Year Built
	1979 or earlier	1980 to 1989	1990 to 1999	2000 to 2002	
Overall	30.1%	28.9%	32.5%	8.4%	1988
Full-Service	35.0%	35.0%	28.3%	1.7%	1986
Exterior	18.2%	13.6%	40.9%	27.3%	1995

Conveyor Car Wash Results

Car Volume & Price

- ◆ Full-service conveyors washed slightly over 10,000 more cars on average than exterior conveyors. However, 10 percent of exterior operators estimated washing 150,000 or more cars compared to only six percent of full-service operators.

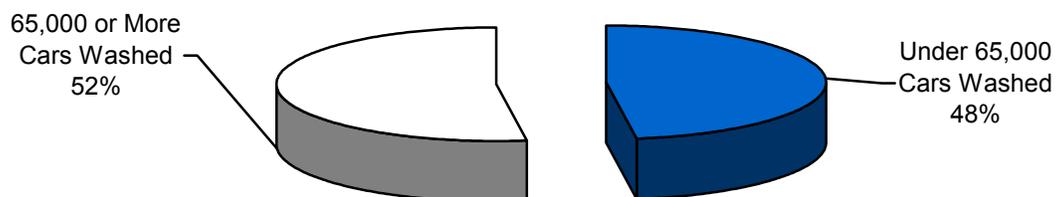
Number of Cars Washed	Overall	Full-Service	Exterior
Less than 25,000	2.2%	2.9%	-
25,000 to 49,999	16.3%	10.0%	38.1%
50,000 to 74,999	39.1%	42.9%	28.6%
75,000 to 84,999	7.6%	7.1%	9.5%
85,000 to 99,999	14.1%	17.1%	4.8%
100,000 to 124,999	12.0%	12.9%	4.8%
125,000 to 149,999	2.2%	1.4%	4.8%
150,000 or more	6.5%	5.7%	9.5%
<hr/>			
Average in 2002	80,932	83,246	71,834
Median in 2002	63,750	65,109	61,472
<hr/>			
Average in 2000	65,675	70,140	59,233
Median in 2000	62,500	62,500	60,491
<hr/>			
Average in 1998	**	67,000	67,047
Median in 1998	**	**	**

** = Not Applicable.

- = No data was submitted.

- ◆ For the remainder of this section, in addition to showing data for full-service and exterior car washes, data reported for the full-service wash segment will also be shown by “high volume” and “low volume.” For our purposes, “low volume” represents full-service facilities that washed under 65,000 cars in 2002; “high volume” washes represents full-service sites that washed 65,000 or more cars during the 2002 calendar year. Low volume washes constituted 48 percent of our sample; high volume washes comprised 52 percent of our sample.

Full-Service High Volume vs. Low Volume



Conveyor Car Wash Results

Car Volume & Price - continued

- ◆ Full-service and exterior conveyor operators had a similar percentage of free or complimentary washes. The full-service conveyor operators had a higher percentage of total sales in package washes.

Percentage of Free or Complimentary Washes	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Less than 1%	14.3%	14.9%	6.7%	23.5%	12.5%
1%	21.4%	22.4%	16.7%	23.5%	18.8%
Between 1% and 5%	40.5%	37.3%	50.0%	26.5%	56.3%
5% or more	23.8%	25.4%	26.7%	26.5%	12.5%
Average in 2002	4.1%	4.2%	3.6%	4.9%	3.6%
Average in 2000	3%	3%	2.7%	3.3%	5%

Percentage of Package Washes	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Less than 25%	19.8%	15.7%	9.4%	22.9%	30.0%
25 to less than 50%	30.8%	30.0%	25.0%	34.3%	35.0%
50 to less than 75%	36.3%	40.0%	43.8%	34.3%	25.0%
75% or more	13.2%	14.3%	21.9%	8.6%	10.0%
Average in 2002	45.7%	47.9%	54.7%	41.0%	40.4%
Average in 2000	45%	47%	47%	47%	40%
Average in 1998	**	45%	**	**	38%

** = Not Applicable.

- ◆ Compared to the previous year, exterior conveyor operators were more likely to say their wash volumes increased or remained the same. About half of the full-service operators reported their wash volumes decreased on average by seven percent.

Wash Volume Compared To Previous Year	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Percent reporting Volume Increase	41.4%	37.3%	35.5%	39.4%	52.6%
Average percent of Volume Increase	10.8%	10.4%	9.0%	11.5%	11.7%
Percent reporting Volume Remained the Same	13.8%	11.9%	16.1%	9.1%	21.1%
Percent reporting Volume Decrease	44.8%	50.7%	48.4%	51.5%	26.3%
Average percent of Volume Decrease	7.1%	7.1%	6.6%	7.3%	7.1%

Conveyor Car Wash Results

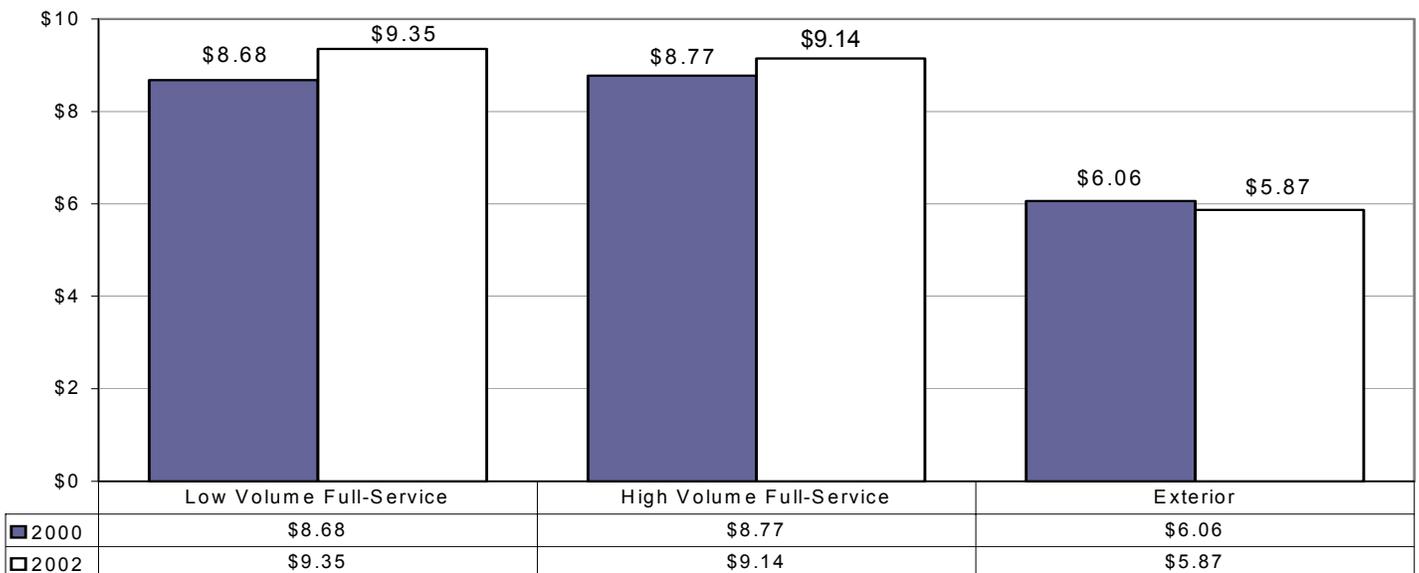
Car Volume & Price - continued

- In general, the full-service conveyor base wash price increased 7 percent from 1998 and 6 percent from 2000. The exterior conveyor base wash price increased 10 percent from 1998 but decreased 3 percent from 2000. Interestingly, base prices for conveyor operations ranged from \$3.00 to \$13.00. The lowest range due to exterior prices and the high end influenced by full-service pricing.

Business Profile	Overall	Full- Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Overall Average in 1998	**	\$8.65	**	**	\$5.35
Overall Average in 2000	\$7.70	\$8.72	\$8.68	\$8.77	\$6.06
Overall Average in 2002	\$8.43	\$9.28	\$9.35	\$9.14	\$5.87
By Region:					
Northeast	\$7.56	\$8.14	\$7.59	\$8.40	\$6.29
Southeast	\$8.32	\$9.05	\$9.28	\$8.58	\$4.67
Southwest	\$9.94	\$9.94	\$10.77	\$9.33	-
Northwest	\$6.60	-	-	-	\$6.60
Midwest	\$8.24	\$9.46	\$9.54	\$9.38	\$5.87
By Area Size:					
Urban	\$8.44	\$9.03	\$8.89	\$8.93	\$5.25
Suburban	\$8.61	\$9.53	\$9.93	\$9.26	\$6.01
Rural	\$7.75	\$8.91	\$8.91	\$8.95	\$6.00
By 2002 Gross Annual Income:					
Less than \$500,000	\$6.03	\$8.28	\$8.28	-	\$5.39
\$500,000 to \$999,999	\$8.26	\$8.94	\$8.76	\$9.49	\$6.56
\$1,000,000 or more	\$9.31	\$9.66	\$10.58	\$9.07	\$5.74

** = Not Applicable.
 - = No data was submitted.

Conveyor Wash Base Price for 2000 vs. 2002



Range of Base Prices:	Minimum:	Maximum:
Overall	\$3.00	\$13.00
Low Volume Full-Service	\$4.95	\$13.00
High Volume Full-Service	\$5.00	\$12.99
Exterior	\$3.00	\$8.00

Conveyor Car Wash Results

Capture Rates

- ◆ The table below shows the percentage of business captured by passing traffic on an annual basis. Breakouts of the data are provided by region, area size and 2002 gross annual income. Capture rates were highest at high volume full-service operations, followed by low volume full-service business. On average, high volume operators reported capturing eight percent of the traffic that passes by their businesses.
- ◆ Regionally, capture rates were the lowest in the Southwest region and the highest in the Northeast, except for reporting low volume full-service facilities.
- ◆ Capture rates were the lowest at exterior businesses. When evaluating captures rates by 2002 gross annual income, however, exterior operators with an average operating income of more than \$1,000,000 reported, on average, a significantly higher capture rate than full-service operators in the same income bracket.

Capture Rates by Primary Business					
Business Profile	Overall	Full- Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Average in 1998	**	**	**	**	**
Average in 2000	**	**	**	**	**
Average in 2002	7.4%	7.0%	6.8%	7.9%	6.2%
By Region:					
Northeast	13.6%	12.1%	1.1%	30.8%	16.6%
Southeast	7.3%	8.5%	10.6%	5.3%	1.1%
Southwest	1.5%	1.5%	1.0%	1.7%	-
Northwest	-	-	-	-	-
Midwest	6.4%	6.4%	8.1%	1.0%	2.8%
By Area Size:					
Urban	4.2%	4.8%	9.5%	1.0%	1.3%
Suburban	10.9%	10.5%	7.4%	17.0%	7.4%
Rural	5.2%	1.6%	1.6%	-	8.8%
By 2002 Gross Annual Income:					
Less than \$500,000	10.1%	1.0%	1.0%	-	7.9%
\$500,000 to \$999,999	11.5%	16.8%	11.1%	45.5%	2.3%
\$1,000,000 or more	3.9%	2.7%	3.4%	2.3%	12.7%

- = No data was submitted.

** = Not Applicable.

Note: This survey question was asked differently in previous study years. Respondents were asked to report traffic counts and not capture rates of passing traffic.

Conveyor Car Wash Results

Profit Centers

- ◆ Similar to the 2000 study, full-service operators were more likely than exterior operators to have plans to add a profit center in the next 1-2 years.

Profit Centers	Overall			Full-Service			Exterior		
	Currently Offer	Plan to Offer in 1 to 2 Years	Do not Plan to Offer	Currently Offer	Plan to Offer in 1 to 2 Years	Do not Plan to Offer	Currently Offer	Plan to Offer in 1 to 2 Years	Do not Plan to Offer
ATM	27.7%	12.0%	60.2%	27.0%	15.9%	57.1%	26.3%	-	73.7%
Convenience Store	33.7%	-	66.3%	33.9%	-	66.1%	30.0%	-	70.0%
Express Detailing	67.4%	1.1%	31.5%	80.9%	1.5%	17.6%	25.0%	-	75.0%
Gas Station	42.4%	-	57.6%	46.9%	-	53.1%	25.0%	-	75.0%
Oil Change/Quick Lube	27.8%	5.1%	67.1%	30.5%	6.8%	62.7%	21.1%	-	78.9%
*Other	43.9%	2.4%	53.7%	51.7%	3.4%	44.8%	25.0%	-	75.0%

Profit Centers	Low Volume Full-Service			High Volume Full-Service		
	Currently Offer	Plan to Offer in 1 to 2 Years	Do not Plan to Offer	Currently Offer	Plan to Offer in 1 to 2 Years	Do not Plan to Offer
ATM	15.4%	7.7%	76.9%	36.4%	21.2%	42.4%
Convenience Store	23.1%	-	76.9%	45.5%	-	54.5%
Express Detailing	82.8%	3.4%	13.8%	80.0%	-	20.0%
Gas Station	33.3%	-	66.7%	61.8%	-	38.2%
Oil Change/Quick Lube	38.5%	11.5%	50.0%	26.7%	3.3%	70.0%
*Other	58.3%	8.3%	33.3%	53.3%	-	46.7%

- = No data was submitted.

*Other (20 responses)

- Detailing. (3 responses)
- Greeting card store in lobby. (2 responses)
- Gift shop. (2 responses)
- Four Self-Serve car washes.
- Accessories.
- Café.
- Coffee shop.
- Dog wash.
- Full detailing.
- Gift shop, candy, soda, etc.
- Hair salon.
- Quick lube.
- Paintless dent removal.
- Self-storage.
- Signage.
- Window tinting.

Conveyor Car Wash Results

Discounts/Promotions

- ◆ Coupons and special promotions such as holiday discounts were most often offered by conveyor operators. Slightly more than half of conveyor operators offered frequency wash programs and paid-in-advance wash tokens, but never used annual passes as a promotion for customers.

Have you ever offered the following?	Yes, at all of my facilities	At some of my facilities	No Longer Offered	Never Used
Annual Passes	31.5%	2.2%	15.7%	50.6%
Coupons	82.4%	12.1%	2.2%	3.3%
Frequency Wash Programs	55.2%	-	16.1%	28.7%
Paid-in-advance Wash Tokens	53.7%	3.7%	1.2%	41.5%
Special Promotions (for example, holiday discounts)	62.9%	14.6%	3.4%	19.1%
Offer a Rain Guarantee	47.8%	5.6%	13.3%	33.3%

- = No data was submitted.

Most Profitable Season

- ◆ Not surprising, winter was reported by conveyor operators as the most profitable season for their businesses. Regional variances were not statistically significant, as winter was reported as being the most profitable for the majority.

Seasons	Most Profitable Season				
	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Spring	2.37	2.39	2.43	2.38	2.32
Summer	2.98	2.94	3.14	2.81	3.05
Fall	2.99	2.95	2.79	3.06	3.11
Winter	1.72	1.79	1.64	1.88	1.53

Scale: 1 = Most Profitable Season and 4 = Least Profitable Season.

Season	Mean Score by Regions					
	Overall	Northeast	Southeast	Southwest	Northwest	Midwest
Spring	2.37	2.14	2.07	2.29	2.00	2.62
Summer	2.98	3.36	3.47	2.79	2.50	2.73
Fall	2.99	3.29	2.67	2.50	3.00	3.19
Winter	1.72	1.36	1.93	2.43	2.50	1.46

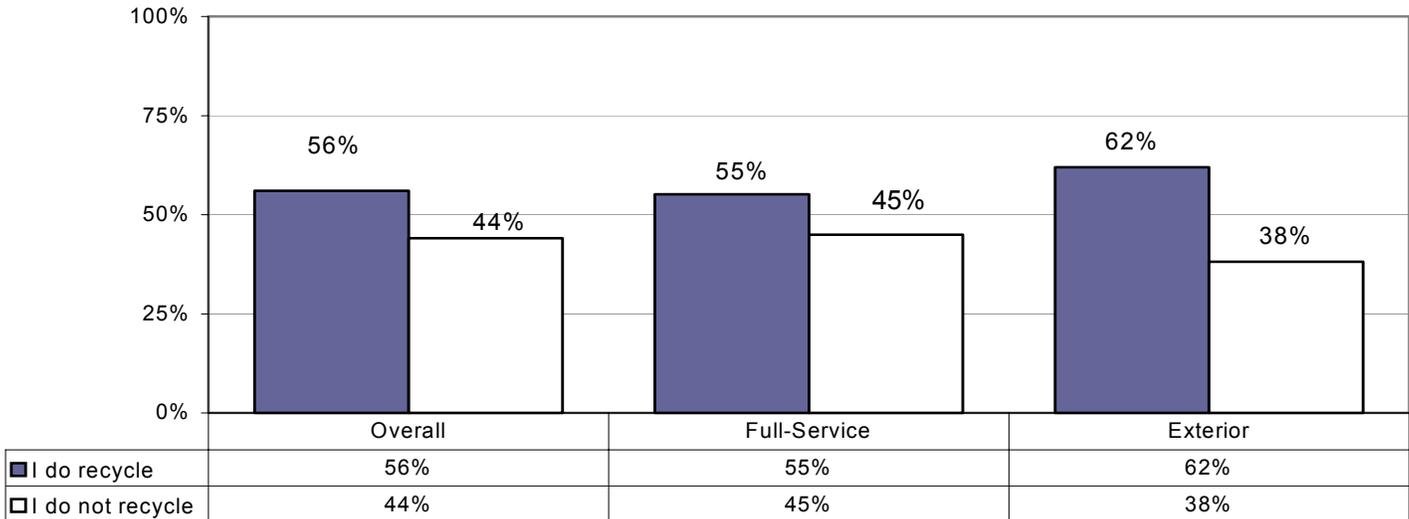
Scale: 1 = Most Profitable Season and 4 = Least Profitable Season.

Conveyor Car Wash Results

Percentage of Water Recycled

- ◆ More exterior conveyor operators responding to this question *did* recycle water than full-service operators; more exterior operators recycled between one and ten percent of the water they used. In comparison, of the 55 percent of full-service conveyors that recycled water, 15 percent recycled more than 75 percent of the water they used. The last table shows the percentage recycling water by region and area size.

Percent of Businesses Recycling Water



Percent of Water Recycled	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
1 to 10 percent	15.4%	14.5%	15.6%	11.8%	19.0%
11 to 20 percent	2.2%	-	-	-	9.5%
21 to 30 percent	7.7%	7.2%	6.3%	5.9%	9.5%
31 to 40 percent	3.3%	2.9%	3.1%	2.9%	4.8%
41 to 50 percent	6.6%	8.7%	9.4%	8.8%	-
51 to 75 percent	5.5%	4.3%	9.4%	-	9.5%
More than 75 percent	15.4%	17.4%	18.8%	14.7%	9.5%
Total – I do recycle	56.1%	55.0%	62.5%	44.1%	61.8%
I do not recycle	44.0%	44.9%	37.5%	55.9%	38.1%

Percent of Businesses Recycling Water

Location of Business	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
By Region:					
Northeast	92.9%	100.0%	100.0%	100.0%	80.0%
Southeast	66.7%	73.3%	90.0%	40.0%	33.3%
Southwest	63.2%	63.2%	60.0%	58.3%	-
Northwest	100.0%	-	-	-	100.0%
Midwest	31.6%	23.1%	25.0%	21.4%	54.5%
By Area Size:					
Urban area	51.9%	56.5%	40.0%	63.6%	25.0%
Suburban area	53.1%	47.2%	57.1%	38.1%	75.0%
Rural area	78.6%	88.9%	100.0%	-	60.0%

- = No data was submitted.

Conveyor Car Wash Results

Labor/Labor Expenses

- ◆ The table below shows the percentage of operators indicating they employ full-time or part-time employees at their facility. Similar to the 2000 study, exterior washes were more likely to offer full-time employee benefits

	Overall	Full-Service	Low Volume Full-Service	High Volume Full-Service	Exterior
Full-time employees	16	20	15	24	5
Part-time employees	15	19	11	26	5
Full-time employee hours	65.0	64.1	70.2	58.4	68.7
Part-time employee hours	47.5	48.0	41.3	55.6	47.4

Benefits	Overall		Full-Service		Exterior	
	Full-time employees	Part-time employees	Full-time employees	Part-time employees	Full-time employees	Part-time employees
Medical Insurance	63.5%	1.0%	61.6%	1.4%	68.2%	-
Dental Plan	42.7%	3.1%	42.5%	4.1%	40.9%	-
Life Insurance	36.5%	-	30.1%	-	54.5%	-
Other	29.2%	1.0%	24.7%	1.4%	40.9%	-

Benefits	Low Volume Full-Service		High Volume Full-Service	
	Full-time employees	Part-time employees	Full-time employees	Part-time employees
Medical Insurance	50.0%	-	74.3%	2.9%
Dental Plan	31.3%	6.3%	54.3%	2.9%
Life Insurance	21.9%	-	40.0%	-
Other	15.6%	3.1%	37.1%	-

- = No data was submitted.

Conveyor Car Wash Results

Income, Cost of Goods and Expenses

The following pages contain information on the income, cost of goods and expenses reported for this survey. In each section, data tables contain dollar per car ratios, averages and the percent of the operating income those averages represent. Please note, not all respondents reported for all line items. Therefore, the average of each line item will not add to the total average. (For example, some facilities only reported totals without reporting line item detail.) All efforts have been made to ensure this data is representative and accurate for those reporting.

Dollar Per Car

This **ratio** was derived using the amount reported for each item divided by the reported number of cars washed at that facility during the year. For example, if a car wash facility reported a full-service wash income of \$500,000 and reported washing 60,000 cars, the dollar per car for the full-service wash would be \$8.33. The dollar per car ratio was first calculated for each individual facility, and then averaged as shown.

Average

For each item, an **average** income, cost of goods and operation expenses was calculated for those reporting. Therefore, this average does not include "0" amounts.

Percent (%) of Operating Income

This percentage was calculated using the average for a particular item divided by the average operating income for only those reporting for each corresponding item. For example, if a facility reported labor costs, but did not report an operating income amount, their costs as a percent of operating income would not be included in the average.

Some costs and expenses have been grouped as necessary due to the way in which some facilities reported detailed line items. They are as follows:

- ◆ *Total Labor Cost* (not including quick lube) includes wash labor, payroll management, wash payroll taxes, and contract labor.
- ◆ *Total Labor Cost* (including quick lube) includes wash labor, payroll management, wash payroll taxes, contract labor, quick lube labor, and quick lube payroll taxes.
- ◆ *Total Insurance* includes liability, worker's compensation, health and life.
- ◆ *Total Utilities* include water, electricity and gas.

Note, for this section, income will be referred to as "Operating Income" because it does not include the "other income" category as reported (i.e., sale of capital assets, interest earned, miscellaneous and rental income). On all pages, an asterisk represents insufficient data. For this reason, figures were not presented.

Conveyor Car Wash Results

Income

Respondents were asked to list income items separately and add all items to equal the total gross income.

The first table presents average operating income by full-service (i.e., overall, low volume and high volume) and exterior car washes. Please note, those reporting only totals are included in this first table, but for proceeding tables these respondents were excluded because they did not provide itemized figures that were then used to calculate dollar per car and percent of operating income.

Primary Business	Financial Totals by All Conveyor Respondents		
	Average Operating Income	Total Cost of Goods	Total Operation Expenses
Full-Service Overall	\$1,707,107	\$1,029,459	\$185,362
Low Volume Full-Service	\$1,063,911	\$525,225	\$146,036
High Volume Full-Service	\$2,337,088	\$1,525,027	\$221,325
Exterior	\$866,313	\$429,665	\$116,434

The tables below show the percentage of respondents reporting income for each item, the average amount of income when it was reported (therefore not including "0" amounts) and the percentage that average was of the total gross income. For the "% of Operating Income" the average of each item was divided by the average operating income average only for those reporting for each corresponding item.

- ◆ In 2002, fuel from full-service washing made up the largest percentage of operating income and average dollar amount of income. Note, "Other Income Total" included income from the gain on sale of capital assets, interest earned, miscellaneous income and rental income.

Income Item (in 2002)	Full-Service Overall (excludes Exterior Operators)		
	\$ Per Car	Average	% of Operating Income
Car Wash-Full Service	\$9.87	\$708,072	41.25%
Car Wash-Exterior	\$1.24	\$109,457	6.38%
Quick Lube	\$4.95	\$329,360	19.19%
Extra Services	\$4.25	\$369,363	21.52%
Detail	\$2.21	\$165,632	9.65%
Fuel	\$11.43	\$1,043,283	60.78%
Merchandise	\$1.10	\$100,276	5.84%
Vending Sales	\$0.11	\$8,265	0.48%
Gift Certificate Sales/Pre-paids/Ticket Books	\$1.06	\$77,567	4.52%
Gain on Sale (Capital Asset)	*	*	*
Redeemed Gift Certs./Pre-paids/Ticket Books	-\$0.52	-\$39,102	-2.28%
Miscellaneous (all other income)	-\$0.10	-\$5,479	-0.32%
Total Gross Income/			
Average Operating Income	\$21.78	\$1,716,436	-
Other Income Total	\$0.11	\$7,242	0.42%

* = Insufficient data to report.

Conveyor Car Wash Results

Income – continued

- ◆ Similar to the 2000 study, dollar per car income for full-service washing was greater for low volume car wash facilities than for high volume facilities. High volume full-service businesses, as well as exterior operations, received a greater percentage of operating income and dollar per car from fuel.

Income Item (in 2002)	Low Volume Full-Service			High Volume Full-Service			Exterior		
	\$ Per Car	Average	% of Operating Income	\$ Per Car	Average	% of Operating Income	\$ Per Car	Average	% of Operating Income
Car Wash-Full Service	\$9.79	\$513,090	56.22%	\$7.87	\$860,959	36.11%	-	-	-
Car Wash-Exterior	\$1.31	\$72,156	7.91%	\$1.04	\$129,220	5.42%	\$6.14	\$423,530	50.53%
Quick Lube	\$5.56	\$238,309	26.11%	\$4.33	\$420,411	17.63%	\$1.72	\$136,744	16.31%
Extra Services	\$2.97	\$173,774	19.04%	\$4.58	\$476,695	19.99%	\$1.44	\$133,755	15.96%
Detail	\$2.50	\$137,933	15.11%	\$1.72	\$187,315	7.86%	\$1.21	\$80,141	9.56%
Fuel	\$5.19	\$291,884	31.98%	\$13.51	\$1,293,749	54.26%	\$10.22	\$1,755,703	209.45%
Merchandise	\$0.63	\$33,849	3.71%	\$1.44	\$146,397	6.14%	\$2.06	\$368,702	43.98%
Vending Sales	\$0.07	\$3,333	0.37%	\$0.13	\$11,553	0.48%	\$0.09	\$5,327	0.64%
Gift Certificate Sales/Pre-pays/Ticket Books	\$1.13	\$66,158	7.25%	\$0.91	\$85,448	3.58%	\$0.59	\$45,230	5.40%
Gain on Sale (Capital Asset)	-	-	-	\$0	\$0	0.00%	-	-	-
Redeemed Gift Certs./Pre-pays/Ticket Books	-\$0.61	-\$36,510	-4.00%	-\$0.48	-\$40,311	-1.69%	\$0.04	\$13,907	1.66%
Miscellaneous (all other income)	\$0.00	-\$1,159	-0.13%	-\$0.12	-\$2,347	-0.10%	\$0.18	\$13,585	1.62%
Total Gross Income/ Average Operating Income	\$17.24	\$912,682	-	\$23.05	\$2,384,315	-	\$9.49	\$838,254	-
Other Income Total	\$0.20	\$10,708	1.17%	\$0.06	\$5,447	0.23%	\$0.01	\$1,216	0.15%

* = Insufficient data to report.

- = No data was submitted.

Conveyor Car Wash Results

Cost of Goods Sold

Respondents were asked to list cost of goods sold separately and add all to equal the total cost of goods sold. The table below shows the percentage of respondents reporting costs for each item, the average cost of each when it was reported (therefore not including "0" amounts) and the percentage that average cost was of the total cost of goods sold. For the "% of Operating Income" the average of each item was divided by the total cost of goods sold average only for those reporting for each corresponding item.

- ◆ Not surprising, those facilities selling gas received the greatest dollar per income and percentage of operating income from fuel. Note, some costs have been grouped as necessary (see below).

Full-Service Overall (excludes Exterior Operators)			
Cost of Goods Sold	\$ Per Car	Average	% of Operating Income
Labor (salaries and wages only) – Wash	\$6.11	\$509,646	29.69%
Labor (salaries and wages only) – Quick Lube	\$6.41	\$530,773	30.92%
COGS – Fuel	\$9.95	\$909,874	53.01%
COGS – Merchandise	\$0.69	\$62,679	3.65%
COGS – Quick Lube	\$2.06	\$134,343	7.83%
COGS – Wash supplies	\$0.67	\$51,040	2.97%
Repairs – Equipment	\$0.36	\$25,298	1.47%
Credit Card Fees	\$0.30	\$24,624	1.43%
Customer Damage – Wash	\$0.13	\$9,881	0.58%
Customer Damage – Quick Lube	\$0.05	\$3,375	0.20%
Total Cost of Goods Sold	\$13.39	\$1,068,431	62.25%
Average Operating Income	\$21.78	\$1,716,436	-

Note:

Total Labor Cost (not including quick lube) includes wash labor, payroll management, wash payroll taxes, and contract labor.

Total Labor Cost (including quick lube) includes wash labor, payroll management, wash payroll taxes, contract labor, quick lube labor, and quick lube payroll taxes.

Conveyor Car Wash Results

Cost of Goods Sold - continued

- ◆ Labor costs including quick lube services was the greatest percentage of operating income for low volume full-service facilities.

Cost of Goods Sold	Low Volume Full-Service			High Volume Full-Service			Exterior		
	\$ Per Car	Average	% of Operating Income	% Per Car	Average	% of Operating Income	\$ Per Car	Average	% of Operating Income
Labor (salaries and wages only) – Wash	\$6.56	\$344,659	37.76%	\$5.68	\$642,801	26.96%	\$2.33	\$148,124	17.67%
Labor (salaries and wages only) – Quick Lube	\$6.92	\$359,819	39.42%	\$5.96	\$670,324	28.11%	\$2.57	\$163,858	19.55%
COGS – Fuel	\$4.70	\$264,556	28.99%	\$11.59	\$1,111,536	46.62%	\$9.45	\$1,609,059	91.95%
COGS – Merchandise	\$0.41	\$21,659	2.37%	\$0.89	\$90,226	3.78%	\$0.78	\$125,674	14.99%
COGS – Quick Lube	\$2.14	\$93,868	10.28%	\$1.98	\$174,817	7.33%	\$1.19	\$104,934	12.52%
COGS – Wash supplies	\$0.57	\$28,755	3.15%	\$0.60	\$69,223	2.90%	\$0.39	\$30,576	3.65%
Repairs – Equipment	\$0.31	\$17,024	1.87%	\$0.30	\$31,155	1.31%	\$0.24	\$19,072	2.28%
Credit Card Fees	\$0.20	\$11,052	1.21%	\$0.35	\$36,035	1.51%	\$0.08	\$7,913	0.94%
Customer Damage – Wash	\$0.12	\$6,347	0.70%	\$0.13	\$12,888	0.54%	\$0.06	\$4,335	0.52%
Customer Damage – Quick Lube	\$0.06	\$2,727	0.30%	\$0.04	\$3,807	0.16%	\$0.04	\$2,531	0.30%
Total Cost of Goods Sold	\$9.87	\$513,678	56.28%	\$15.00	\$1,555,364	65.23%	\$4.75	\$459,029	54.76%
Average Operating Income	\$17.24	\$912,682	-	\$23.05	\$2,384,315	-	\$9.49	\$838,254	-

Conveyor Car Wash Results

Operation Expenses

- ◆ On average, the greatest single expense was total utilities including water, electricity and gas followed by “total insurance.” Note, some costs have been grouped as necessary (see below).

Operation Expenses	Full-Service (excludes Exterior Operators)		
	\$ Per Car	Average	% of Operating Income
Advertising	\$0.40	\$29,356	1.71%
Auto Expense	\$0.10	\$5,581	0.33%
Bad Debts	\$0.01	\$1,182	0.07%
Bank Charges	\$0.04	\$3,022	0.18%
Over/Short	\$0.00	\$511	0.03%
Contributions/Donations	\$0.06	\$2,395	0.14%
Entertainment/Travel	\$0.07	\$4,499	0.26%
Total Insurance	\$0.59	\$44,441	2.59%
Office Supplies	\$0.11	\$9,236	0.54%
Professional Fees	\$0.14	\$7,888	0.46%
Repairs – General	\$0.22	\$18,121	1.06%
Storage	\$0.11	\$6,993	0.41%
Uniforms	\$0.06	\$3,957	0.23%
Total Utilities (water, electricity, gas)	\$0.67	\$49,668	2.89%
Utilities – Telephone	\$0.08	\$5,140	0.30%
Miscellaneous (all other income)	\$0.30	\$26,149	1.52%
TOTAL Expenses	\$1.51	\$103,441	6.03%
Depreciation	\$0.97	\$58,458	3.41%
Interest Expense	\$0.84	\$50,629	2.95%
Lease – Building	\$1.53	\$129,497	7.54%
Lease Equipment	\$0.11	\$8,951	0.52%
R & D	\$0.10	\$7,817	0.46%
Taxes - Property	\$0.23	\$17,236	1.00%
Total Other Expenses	\$2.49	\$175,355	10.22%
Average Operating Income	\$21.78	\$1,716,436	-

Note:

Total Insurance includes liability, worker’s compensation, health, and life.

Total Utilities include water, electricity and gas.

Conveyor Car Wash Results

Operation Expenses - continued

◆ Expenses were greater for full-service conveyor operators.

Operation Expenses	Low Volume Full-Service			High Volume Full-Service			Exterior		
	\$ Per Car	Average	% of Operating Income	\$ Per Car	Average	% of Operating Income	\$ Per Car	Average	% of Operating Income
Advertising	\$0.31	\$16,471	1.80%	\$0.35	\$39,683	1.66%	\$0.19	\$12,370	1.48%
Auto Expense	\$0.12	\$6,063	0.66%	\$0.04	\$4,837	0.20%	\$0.03	\$2,315	0.28%
Bad Debts	\$0.01	\$505	0.06%	\$0.01	\$1,699	0.07%	\$0.01	\$340	0.04%
Bank Charges	\$0.07	\$4,146	0.45%	\$0.02	\$2,219	0.09%	\$0.05	\$2,742	0.33%
Over/Short	\$0.00	-\$241	-0.03%	\$0.01	\$915	0.04%	\$0.00	\$278	0.03%
Contributions/Donations	\$0.10	\$3,280	0.36%	\$0.01	\$1,694	0.07%	\$0.02	\$1,392	0.17%
Entertainment/Travel	\$0.06	\$3,752	0.41%	\$0.04	\$4,597	0.19%	\$0.04	\$2,753	0.33%
Total Insurance	\$0.61	\$31,750	3.48%	\$0.45	\$53,648	2.25%	\$0.23	\$16,754	2.00%
Office Supplies	\$0.12	\$6,285	0.69%	\$0.10	\$12,639	0.53%	\$0.04	\$3,315	0.40%
Professional Fees	\$0.12	\$6,210	0.68%	\$0.10	\$8,999	0.38%	\$0.09	\$6,318	0.75%
Repairs – General	\$0.21	\$11,336	1.24%	\$0.23	\$22,841	0.96%	\$0.24	\$16,503	1.97%
Storage	\$0.27	\$16,576	1.82%	\$0.07	\$4,597	0.19%	-	-	-
Uniforms	\$0.07	\$3,375	0.37%	\$0.04	\$4,434	0.19%	\$0.02	\$1,721	0.21%
Total Utilities (water, electricity, gas)	\$0.65	\$34,581	3.79%	\$0.57	\$61,692	2.59%	\$0.64	\$43,593	5.20%
Utilities – Telephone	\$0.08	\$4,210	0.46%	\$0.06	\$5,985	0.25%	\$0.06	\$4,570	0.55%
Miscellaneous (all other income)	\$0.30	\$16,253	1.78%	\$0.25	\$27,692	1.16%	\$0.17	\$12,940	1.54%
TOTAL Expenses	\$1.35	\$70,948	7.77%	\$1.30	\$142,010	5.96%	\$0.97	\$63,309	7.55%
Depreciation	\$1.39	\$55,971	6.13%	\$0.63	\$60,973	2.56%	\$0.65	\$47,035	5.61%
Interest Expense	\$1.01	\$41,473	4.54%	\$0.63	\$56,571	2.37%	\$0.56	\$47,867	5.71%
Lease – Building	\$2.81	\$165,823	18.17%	\$0.93	\$117,023	4.91%	\$1.52	\$96,165	11.47%
Lease Equipment	\$0.07	\$3,868	0.42%	\$0.14	\$12,648	0.53%	\$0.16	\$12,539	1.50%
R & D	\$0.22	\$13,450	1.47%	\$0.04	\$5,000	0.21%	\$0.04	\$5,000	0.60%
Taxes - Property	\$0.24	\$12,356	1.35%	\$0.23	\$21,510	0.90%	\$0.20	\$11,702	1.40%
Total Other Expenses	\$3.01	\$148,749	16.30%	\$1.96	\$203,007	8.51%	\$1.84	\$129,465	15.44%
Average Operating Income	\$17.24	\$912,682	-	\$23.05	\$2,384,315	-	\$9.49	\$838,254	-

- = No data was submitted.

In-Bay Automatic Car Wash Results

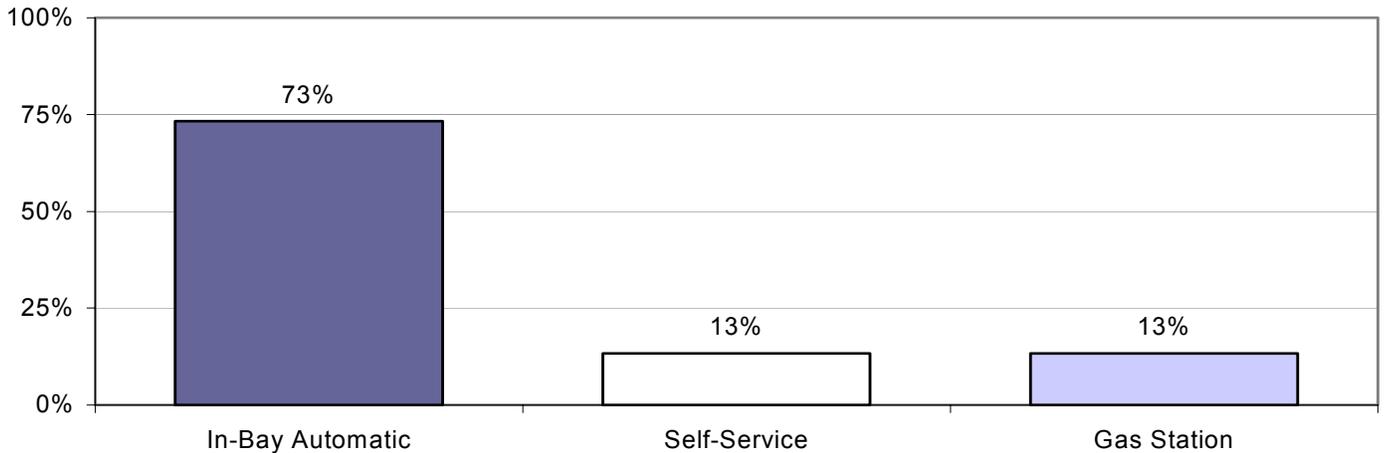
In-Bay Automatic Car Wash Results

The following section presents detailed information concerning the operation of in-bay automatic car washes. The in-bay automatic washes a car automatically, but the car does not move.

Business Profile

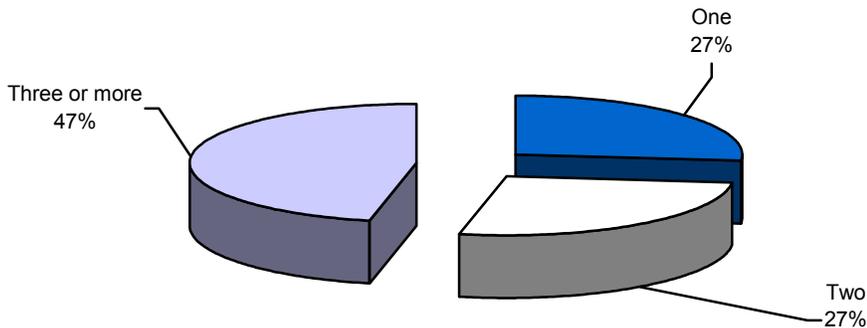
- The majority of operators indicated that their facilities were primarily in-bay automatic facilities. Self-service washing and gas stations comprised the second-most often mentioned primary businesses of these facilities. In 2002, no respondents indicated that they had oil changes, quick lubes or a facility other than an in-bay, self-service or gas station facility.

Primary Business of Facility



- According to responding in-bay operators, they were more likely to operate more than two washes. Those respondents who owned or operated gas stations were more likely to have multiple gas stations. Those respondents owning primarily in-bay automatic facilities (73%) typically had only one in-bay automatic bay (50%). Sixty-four percent of the primarily in-bay operators had no self-service bays; when facilities did report having self-service bays, they typically had only one.

Number of Car Washes Owned/Operated



Mean Number of Car Washes Owned/Operated:

Overall	33.53
In-Bay Automatic	7.38
Self-Service	2.50
Gas Station(s)	170.00
*Other	26.00

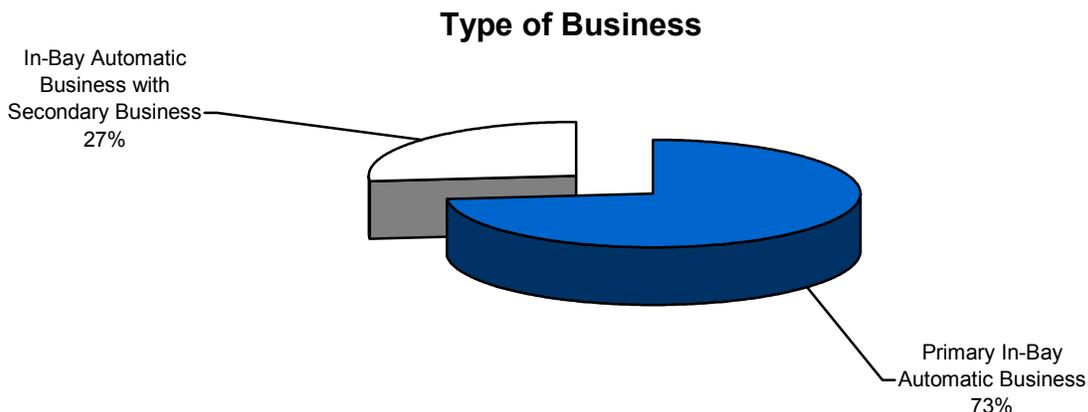
***Other types of car washes owned/operated were: (1 response)**

- Tobacco and Plus Stores.

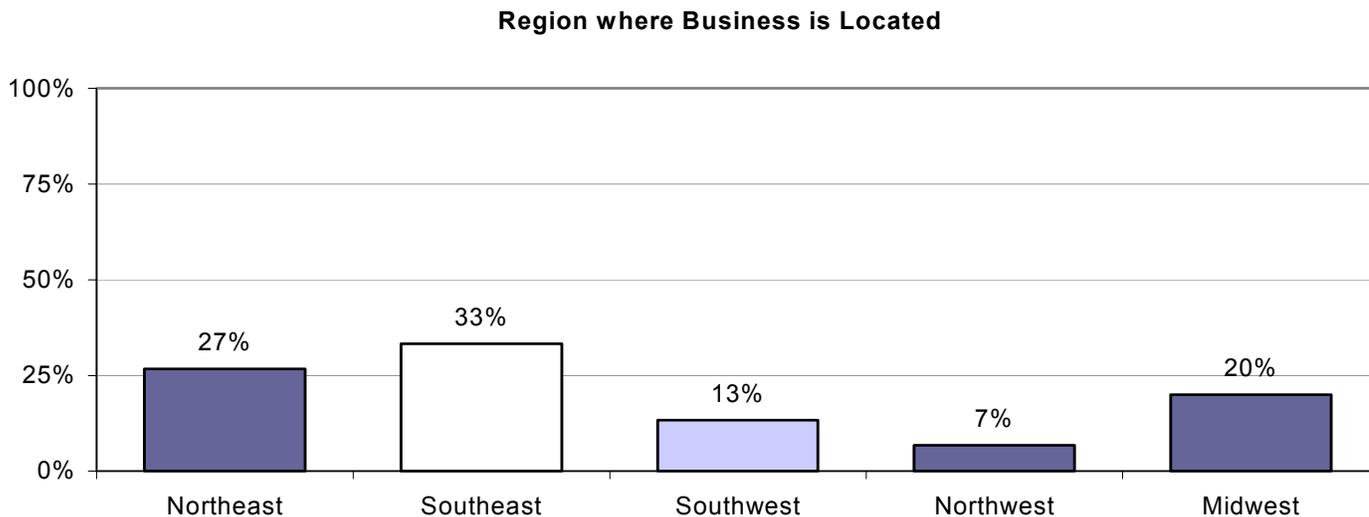
In-Bay Automatic Car Wash Results

Business Profile – continued

- ◆ The majority of operators self-described their facilities as primarily in-bay automatic facilities. Self-service washing and gas stations were the second-most often mentioned primary business of those facilities. Therefore, for the purposes of this report, the in-bay automatic facilities have been divided into two groups for which data is shown: Primary In-Bay Automatic Business and In-Bay Automatic with Secondary Business.



- ◆ The graph below shows the percentages of all in-bay automatic businesses within in each region. More respondents (33%) owned a business in the Southeast region than any other region.

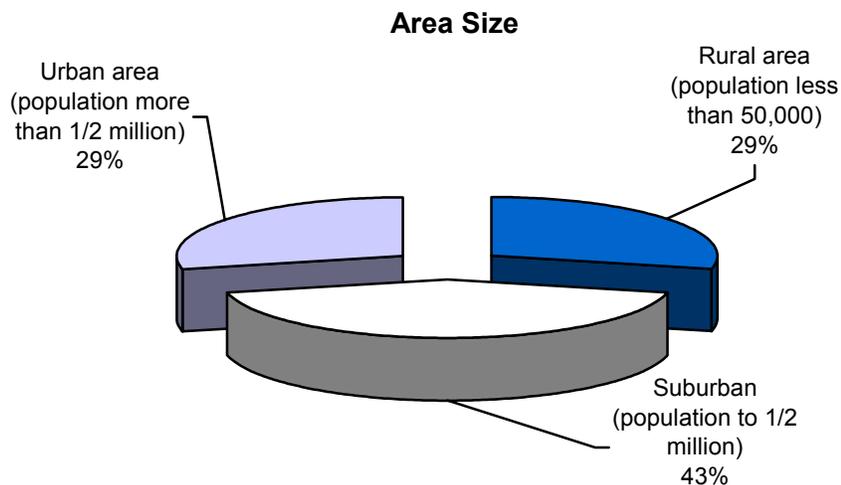


- Northeast: Connecticut, District of Columbia, Delaware, Massachusetts, Maryland, Maine, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Virginia, Vermont, West Virginia
- Southeast: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee
- Southwest: Arizona, California, Colorado, Hawaii, New Mexico, Nevada, Oklahoma, Texas, Utah
- Northwest: Alaska, Idaho, Montana, Oregon, Washington, Wyoming
- Midwest: Iowa, Illinois, Indiana, Kansas, Michigan, Minnesota, Missouri, North Dakota, Nebraska, Ohio, South Dakota, Wisconsin

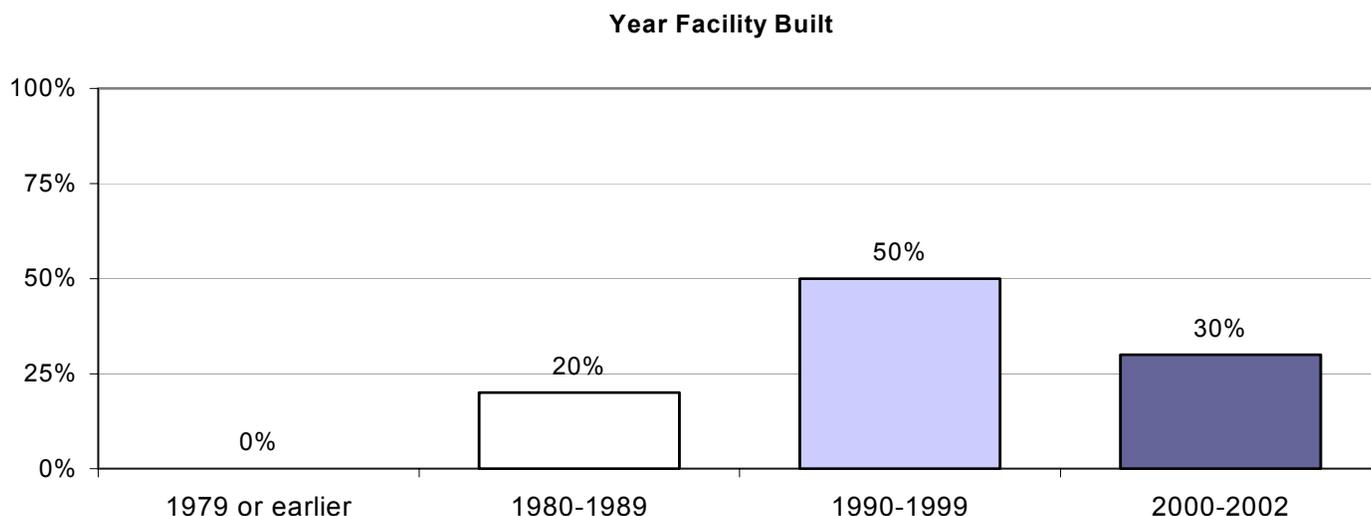
In-Bay Automatic Car Wash Results

Business Profile – continued

- ◆ Unlike the 2000 study, more in-bay automatic facilities were located in suburban areas than in rural areas.



- ◆ On average, the majority of in-bay respondents (80%) indicated that their facilities had been built more recently. For the 2002 study, the median year built of in-bay automatic facilities was 1998. In comparison, conveyor and self-service operators were more likely to own or operate facilities that were built in 1979 or earlier; the median years built for their facilities were 1988 and 1987 respectively.



- ◆ In 2002, all in-bay automatic washes reported on in this study were touch-free. Ninety-seven percent of those responding in 2000 were touch-free.

In-Bay Automatic Car Wash Results

Car Volume & Price

- ◆ In-bay automatic washes without secondary businesses, such as self-service bays and gas stations, washed more cars on average compared to in-bay automatic washes with secondary businesses. Overall, most in-bay automatic facilities reportedly washed less than 50,000 in 2002.

Number of Cars Washed	Overall	Primary In-Bay Automatic Business	In-Bay Automatic with Secondary Business
Less than 25,000	30.0%	16.7%	50.0%
25,000 to 49,999	40.0%	50.0%	25.0%
50,000 to 74,999	10.0%	16.7%	-
75,000 to 84,999	-	-	-
85,000 to 99,999	-	-	-
100,000 to 124,999	-	-	-
125,000 to 149,999	-	-	-
150,000 or more	20.0%	16.7%	25.0%
Average in 2002	42,103	49,929	23,842
Average in 2000	36,400	29,878	37,178
Average in 1998	20,799	**	**

** = Not Applicable.

- = No data was submitted.

- ◆ In general, most in-bay automatic facilities (70%) indicated that about 1 percent of their car washes were free or complimentary washes. On average, the percentage of free or complimentary washes was similar to the 2000 study findings.

Percentage of Free or Complimentary Washes	Overall	Primary In-Bay Automatic Business	In-Bay Automatic with Secondary Business
Less than 1%	10.0%	-	33.3%
1%	70.0%	85.7%	33.3%
Between 1% and 5%	10.0%	-	33.3%
5% or more	10.0%	14.3%	-
Average in 2002	2.2%	2.3%	2.0%
Average in 2000	2%	**	**

** = Not Applicable.

- = No data was submitted.

In-Bay Automatic Car Wash Results

Car Volume & Price - continued

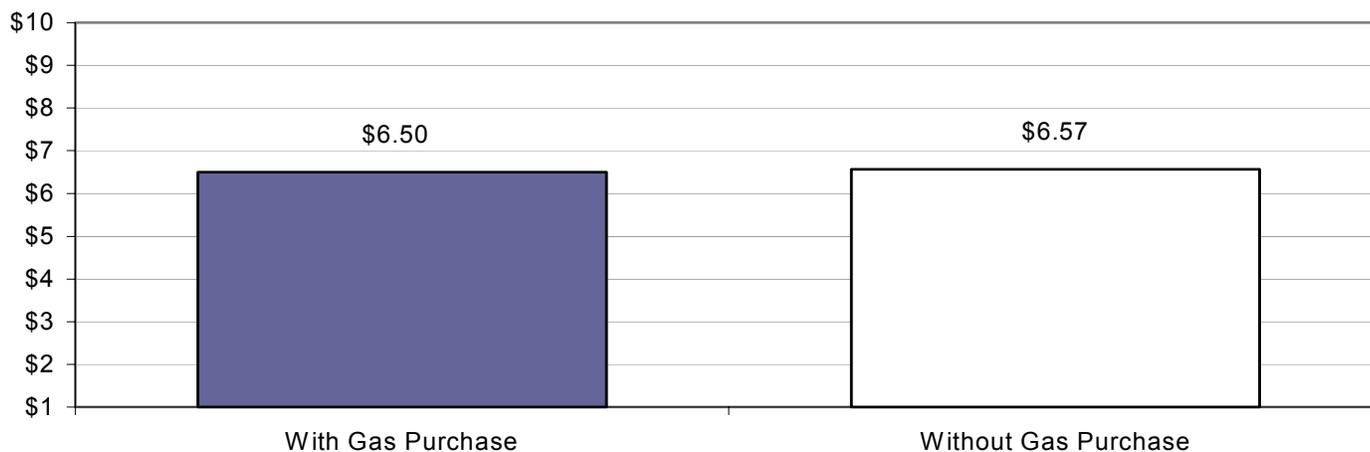
- ◆ Compared to the previous year, the majority of in-bay operators with secondary businesses reported an increase in wash volume, averaging 11 percent. In comparison, half of the in-bay operators without secondary businesses reported their volumes remained the same and 33 percent indicated that volumes decreased, on average, by 34 percent.

Wash Volume Compared To Previous Year	Overall	Primary In-Bay Automatic Business	In-Bay Automatic with Secondary Business
Percent reporting Volume Increase	40.0%	16.7%	75.0%
Average percent of Volume Increase	10.0%	7.0%	11.0%
Percent reporting Volume Remained the Same	30.0%	50.0%	-
Percent reporting Volume Decrease	30.0%	33.3%	25.0%
Average percent of Volume Decrease	24.0%	33.5%	5.0%

- = No data was submitted.

- ◆ The overall wash base price with no gas purchase was 1 percent greater than the overall wash base price with a gas purchase.

Overall Average Base Price in 2002



In-Bay Automatic Car Wash Results

Car Volume & Price - continued

- ◆ The overall average minimum price for a wash increased by 8 percent from 2000, while the overall average maximum price for a wash increased by about 15 percent from 2000.

Business Profile	Range of Wash Prices	
	Minimum	Maximum
Overall Average in 1998	\$2.43	\$5.70
Overall Average in 2000	\$4.20	\$6.94
Overall Average in 2002	\$4.53	\$8.00
By Type of Facility:		
Primary In-Bay Automatic Business	\$4.55	\$8.00
In-Bay Automatic with Secondary Business	\$4.50	\$8.00
By Area Size:		
Urban	\$5.25	\$8.00
Suburban	\$4.17	\$8.00
Rural	\$4.50	\$8.00
By 2002 Gross Annual Income:		
Up to \$100,000	*	*
More than \$100,000	\$4.25	\$8.00

* = Insufficient data to report.

- ◆ Overall, 43 percent of the responding in-bay operators reported that the last base price increase took place in 2002 followed by 29 percent reporting that they last increased base prices in 2001. Interestingly, those operating secondary business were more likely to increase base prices in more recent years than those without secondary businesses.

Year of Last Base Price Increase	Overall	Primary In-Bay Automatic Business	In-Bay Automatic with Secondary Business
1998 or earlier	-	-	-
1999	14.3%	25.0%	-
2000	14.3%	-	33.3%
2001	28.6%	50.0%	-
2002	42.9%	25.0%	66.7%

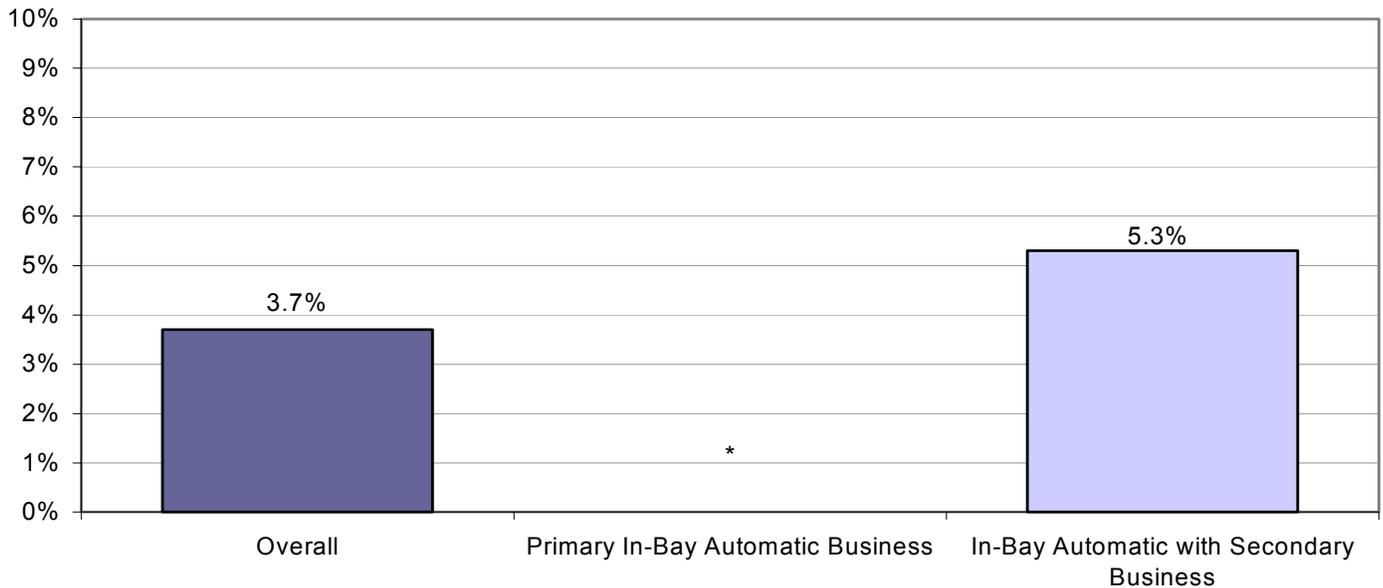
- = No data was submitted.

In-Bay Automatic Car Wash Results

Capture Rates

- ◆ On average, in-bay facilities captured 4 percent of the cars that passed by their businesses in 2002.

Primary Business of Facility



* = Insufficient data to report.

Profit Centers

- ◆ Overall, most in-bay operators responding to this survey do not plan to offer an ATM, express detailing, or oil change/quick lubes. Approximately 40 percent currently offer Convenience Stores, Gas stations and other amenities to their customers. Only 10 percent intend to offer oil change or quick lubes in one to two years.

Profit Centers	Overall		
	Currently Offer	Plan to Offer in 1 to 2 Years	Do not Plan to Offer
ATM	30.0%	-	70.0%
Convenience Store	40.0%	-	60.0%
Express Detailing	16.7%	-	83.3%
Gas Station	40.0%	-	60.0%
Oil Change/Quick Lube	-	10.0%	90.0%
*Other	40.0%	-	60.0%

- = No data was submitted.

*Other

- Fast food, not a national brand.
- Quick-serve restaurants.
- Vending and vacuum.
- Vendor (e.g., Coke, etc.).

In-Bay Automatic Car Wash Results

Discounts/Promotions

- ◆ In general, discounts and promotions were less often offered by in-bay automatic wash operators with secondary businesses, except when offering frequency wash programs.

Discounts/Promotions Offered	Yes, at All	At Some	No Longer Offered	Never Used
Annual passes				
In-Bay Automatic Business	12.5%	-	-	87.5%
In-Bay Automatic with Secondary Business	-	-	-	100.0%
Coupons				
Primary In-Bay Automatic Business	42.9%	14.3%	-	42.9%
In-Bay Automatic with Secondary Business	25.0%	25.0%	25.0%	25.0%
Frequency wash programs				
Primary In-Bay Automatic Business	14.3%	-	-	85.7%
In-Bay Automatic with Secondary Business	75.0%	-	-	25.0%
Paid-in-advance Wash Tokens				
Primary In-Bay Automatic Business	85.7%	-	-	14.3%
In-Bay Automatic with Secondary Business	50.0%	-	-	50.0%
Special promotions				
Primary In-Bay Automatic Business	28.6%	14.3%	-	57.1%
In-Bay Automatic with Secondary Business	50.0%	-	-	50.0%
Washcards/Keys/Tokenotes				
Primary In-Bay Automatic Business	42.9%	-	-	57.1%
In-Bay Automatic with Secondary Business	-	-	-	100.0%

- = No data was submitted.

Percentage of Water Recycled

- ◆ Most operators responding to this question did not recycle water. Operators with secondary businesses were more likely to recycle water than operators without secondary businesses.

Percent of Water Recycled	Overall	Primary In-Bay Automatic Business	In-Bay Automatic with Secondary Business
1 to 10 percent	16.7%	12.5%	25.0%
11 to 20 percent	-	-	-
21 to 30 percent	-	-	-
31 to 40 percent	-	-	-
41 to 50 percent	-	-	-
51 to 75 percent	8.3%	-	25.0%
More than 75 percent	-	-	-
Total Recycling Water	25.0%	12.5%	50.0%
I do not Recycle Water	75.0%	87.5%	50.0%

- = No data was submitted

In-Bay Automatic Car Wash Results

Most Profitable Season

- ◆ Similar to the conveyor and self-service operators, the majority of in-bay survey participants' (82%) most profitable season was winter.

Seasons	Most Profitable 1	2	3	Least Profitable 4	Mean	Base
Spring	18.2%	63.6%	18.2%	-	2.00	11
Summer	-	9.1%	54.5%	36.4%	3.27	11
Fall	-	18.2%	18.2%	63.6%	3.45	11
Winter	81.8%	9.1%	9.1%	-	1.27	11

Scale: Profitability rated on a scale from 1 to 4 (1 being most profitable and 4 being least profitable.)

- = No data was submitted.

Labor/Labor Expenses

- ◆ The table below shows the percentage of operators indicating that they employ full-time or part-time employees at their facility. In-bay automatics with and without secondary businesses were equally likely to employ one full-time employee; in-bays were more likely to offer medical insurance than any other healthcare benefit.

Number of Employees:	Overall	In-Bay Automatic Business	In-Bay Automatic with Secondary Business
Full-time employees	1	1	1
Part-time employees	6	1	17
Hours Worked:			
Full-time hours worked per week	37.5	31.3	50.0
Part-time hours worked per week	19.9	19.9	20.0

Benefits Offered	Full-time Employees	Part-time Employees
Medical Insurance	20.0%	6.7%
Dental Plan	13.3%	6.7%
Life Insurance	6.7%	6.7%
Other	13.3%	13.3%

In-Bay Automatic Car Wash Results

Income, Cost of Goods and Expenses

The following pages contain information on the income, cost of goods and expenses reported for this survey. In each section, data tables contain dollar per car ratios, averages and the percent of the operating income those averages represent. Please note, not all respondents reported for all line items. Therefore, the average of each line item will not add to the total average. (For example, some facilities only reported totals without reporting line item detail.) All efforts have been made to ensure this data is representative and accurate for those reporting. Financial data for "In-Bay Automatic Business" and "In-Bay Automatic with Secondary Businesses" categories could not be shown due to sample size.

Dollar Per Car

This **ratio** was derived using the amount reported for each item divided by the reported number of cars washed at that facility during the year. For example, if a car wash facility reported a full-service wash income of \$150,000 and reported washing 25,000 cars, the dollar per car for the full-service wash would be \$6.00. The dollar per car ratio was first calculated for each individual facility, and then averaged as shown.

Average

For each item, an **average** income, cost of goods and operation expenses was calculated for those reporting. Therefore, this average does not include "0" amounts.

Percent (%) of Operating Income

This percentage was calculated using the average for a particular item divided by the average operating income for only those reporting for each corresponding item. For example, if a facility reported labor costs, but did not report an operating income amount, their costs as a percent of operating income would not be included in the average.

Some costs and expenses have been grouped as necessary due to the way in which some facilities reported detailed line items. They are as follows:

- ◆ *Total Labor Cost* (not including quick lube) includes wash labor, payroll management, wash payroll taxes, and contract labor.
- ◆ *Total Labor Cost* (including quick lube) includes wash labor, payroll management, wash payroll taxes, contract labor, quick lube labor, and quick lube payroll taxes.
- ◆ *Total Insurance* includes liability, worker's compensation, health, and life.
- ◆ *Total Utilities* include water, electricity and gas.

Note, for this section, income will be referred to as "Operating Income" because it does not include the "other income" category as reported (i.e., sale of capital assets, interest earned, miscellaneous and rental income). On all pages, an asterisk represents insufficient data. For this reason, figures were not presented.

In-Bay Automatic Car Wash Results

Income

Respondents were asked to list income items separately and add all items to equal the total gross income.

The first table presents average operating income, total costs of goods and total operation expenses. Please note, those reporting only totals are included in this first table, but for proceeding tables these respondents were excluded because they did not provide itemized figures that then could be used to calculate dollar per car and percent of operating income.

Primary Business	Financial Totals by All Conveyor Respondents		
	Average Operating Income	Total Cost of Goods	Total Operation Expenses
Overall In-Bay Car Washes	\$208,038	\$ 39,681	\$ 32,279

Respondents were asked to list income items separately and add all items to equal the total gross income. The table below shows the percentage of respondents reporting income for each item, the average amount of income when it was reported (therefore not including "0" amounts) and the percentage that average was of the total gross income. For the "% of Operating Income," the average of each item was divided by the total average operating income only for those reporting for each corresponding item.

- ◆ Car wash income on average accounted for the majority of total gross income.

Income Item	Overall In-Bay Car Washes		
	\$ Per Car	Average	% of Operating Income
Car Wash	\$6.88	\$199,544	97.80%
Quick Lube	-	-	-
Extra services	-	-	-
Detail	-	-	-
Gas	-	-	-
Merchandise	-	-	-
Vending sales	\$0.22	\$7,282	3.57%
Gift certificates, etc.	-	-	-
Gain on sale (capital asset)	-	-	-
Coupons/discounts	-	-	-
Redeemed gift certificates, etc.	-	-	-
Miscellaneous	\$0.32	\$9,300	4.56%
Total Gross Income/			
Average Operating Income	\$7.04	\$204,038	-
Other Income Total	-	-	-

- = No data was submitted.

Other income items were not reported due to insufficient response. These income items included gain on sale of capital assets, interest earned, miscellaneous income and rental income.

In-Bay Automatic Car Wash Results

Cost of Goods Sold

Respondents were asked to list cost of goods sold separately and add all to equal the total cost of goods sold. The table below shows the percentage of respondents reporting costs for each item, the average cost of each when it was reported (therefore not including "0" amounts) and the percentage that average cost was of the total cost of goods sold. For the "% of Operating Income," the average of each item was divided by the total cost of goods sold average only for those reporting for each corresponding item.

Some costs have been grouped as necessary (refer to key below).

- ◆ For those reporting, wash supplies accounted for a larger percentage of the total costs of goods sold compared to any other goods sold. Note, some costs have been grouped as necessary (see below).

Cost of Goods Sold	Overall In-Bay Car Washes		
	\$ Per Car	Average	% of Operating Income
Total Labor Cost (Not including quick lube)	\$0.41	\$13,077	6.41%
Total Labor cost (including quick lube)	-	-	-
Fuel	*	*	*
Merchandise	*	*	*
Quick Lube	-	-	-
Wash supplies	\$0.55	\$20,860	10.22%
Repairs – equipment	\$0.41	\$9,973	4.89%
Credit card fees	\$0.07	\$2,442	1.20%
Customer damage wash	\$0.01	\$231	0.11%
Customer damage quick lube	-	-	-
Total Cost of Goods Sold	\$1.17	\$35,641	17.47%
Average Operating Income	\$7.04	\$204,038	-

- = No data was submitted.

* = Insufficient data to report.

Note:

Total Labor Cost (not including quick lube) includes wash labor, payroll management, wash payroll taxes, and contract labor.

Total Labor Cost (including quick lube) includes wash labor, payroll management, wash payroll taxes, contract labor, quick lube labor, and quick lube payroll taxes.

In-Bay Automatic Car Wash Results

Operation Expenses

Respondents were asked to list expense items separately and add all items to equal the total expense. The table below shows the percentage of respondents reporting expenses for each item, the average amount of the expense when it was reported (therefore not including "0" amounts) and the percentage that average was of the total expense. For the "% of Operating Income" the average of each item was divided by average operating income only for those reporting for each corresponding item.

Some expenses have been grouped as necessary.

- ◆ Expenses for general repairs accounted for the greatest percentage of total expenses for those reporting.

Overall In-Bay Car Washes			
Operation Expenses	\$ Per Car	Average	% of Operating Income
Advertising	\$0.06	\$1,804	0.88%
Auto	\$0.07	\$1,545	0.76%
Bad Debts	*	*	*
Bank charges	\$0.02	\$961	0.47%
Over/short	*	*	*
Contributions/donations	\$0.03	\$675	0.33%
Entertainment/travel	\$0.06	\$1,421	0.70%
Total Insurance	-	-	
Office supplies	\$0.04	\$1,130	0.55%
Professional fees	\$0.03	\$761	0.37%
Repairs general	\$0.30	\$7,329	3.59%
Storage	-	-	-
Uniforms	\$0.01	\$200	0.10%
Total utilities (Water, Gas, Electric)	-	-	-
Utility-telephone	\$0.06	\$1,872	0.97%
Miscellaneous	-	-	-
TOTAL Expenses	\$1.13	32,279	15.82%
Total Other Expenses	-	-	-
Average Operating Income	\$7.04	\$204,038	-

- = No data was submitted.

* = Insufficient data to report.

Note:

Total Insurance includes liability, worker's compensation, health, and life.

Total Utilities include water, electricity and gas.

Self-Service Car Wash Results

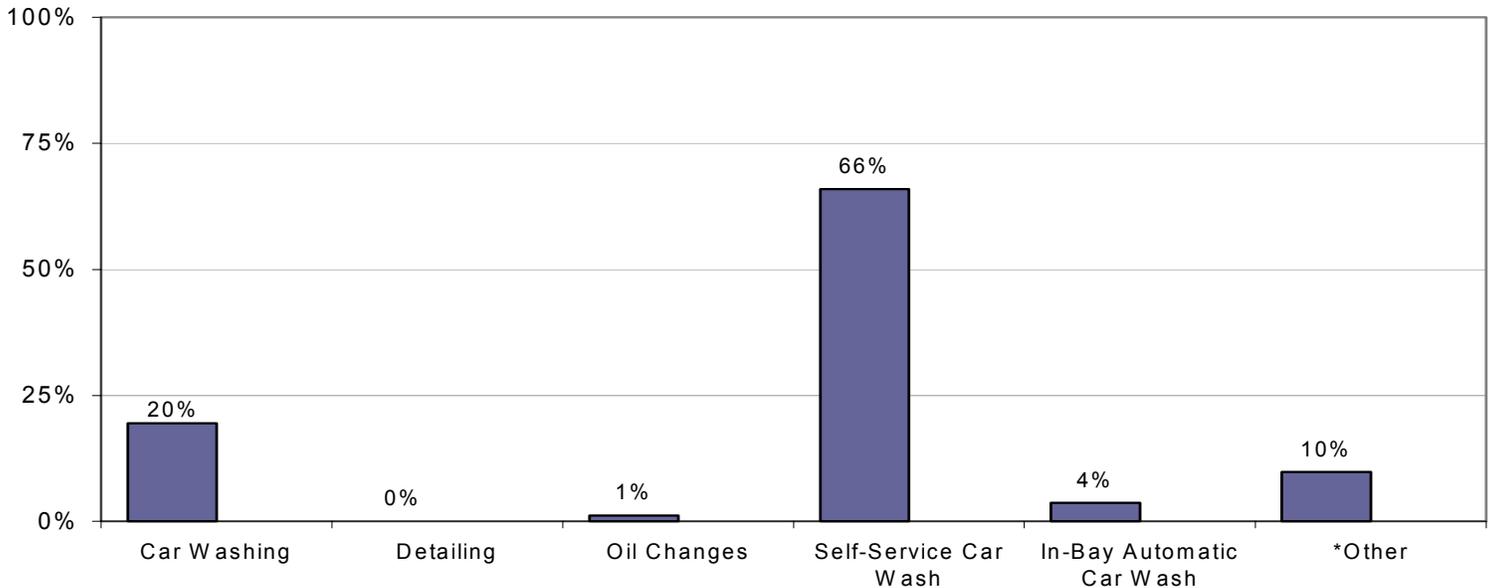
Self-Service Car Wash Results

The following section presents detailed information concerning the operation of self-service car washes. A self-service car wash is a facility where the customer washes their car themselves using coin-operated washing equipment.

Business Profile

- Similar to the 2000 study, the majority of facilities reported on in this survey were primarily car washing self-service facilities. Only 4 percent indicated to be both self-service and in-bay car washes.

Primary Business



Note: Twenty percent of the respondents indicated that "car washing" is the primary function of their businesses.

*Other (8 responses)

- Dry cleaning.
- Express tunnel.
- Fuel distributor.
- Gas station and auto service.
- Laundry mat.
- Laundry mat and electrical business.
- Transportation.
- Tunnel wash.

- The average number of self-service bays operated was 10. Percentages of self-service bays per facility were similar to what were reported in the previous studies. Slightly more than half of self-service facilities reported on did not have any in-bay automatic washes. Of those reporting to have in-bay automatic washes, most only had one.

Primary Business	Number of Car Washes Owned/Operated				Average Number
	One	Two	Three	Four or more	
Overall	15.2%	16.5%	5.1%	63.3%	9.58
Car washing	32.0%	16.0%	24.0%	28.0%	3.84
Detailing	60.0%	-	20.0%	20.0%	2.60
Oil Changes	60.0%	40.0%	-	-	1.40
Self-Service Car Wash	25.8%	10.6%	12.1%	51.5%	8.35
In-Bay Automatic Car Wash	64.5%	12.9%	6.5%	16.1%	3.61
Other	44.4%	44.4%	-	11.1%	1.78

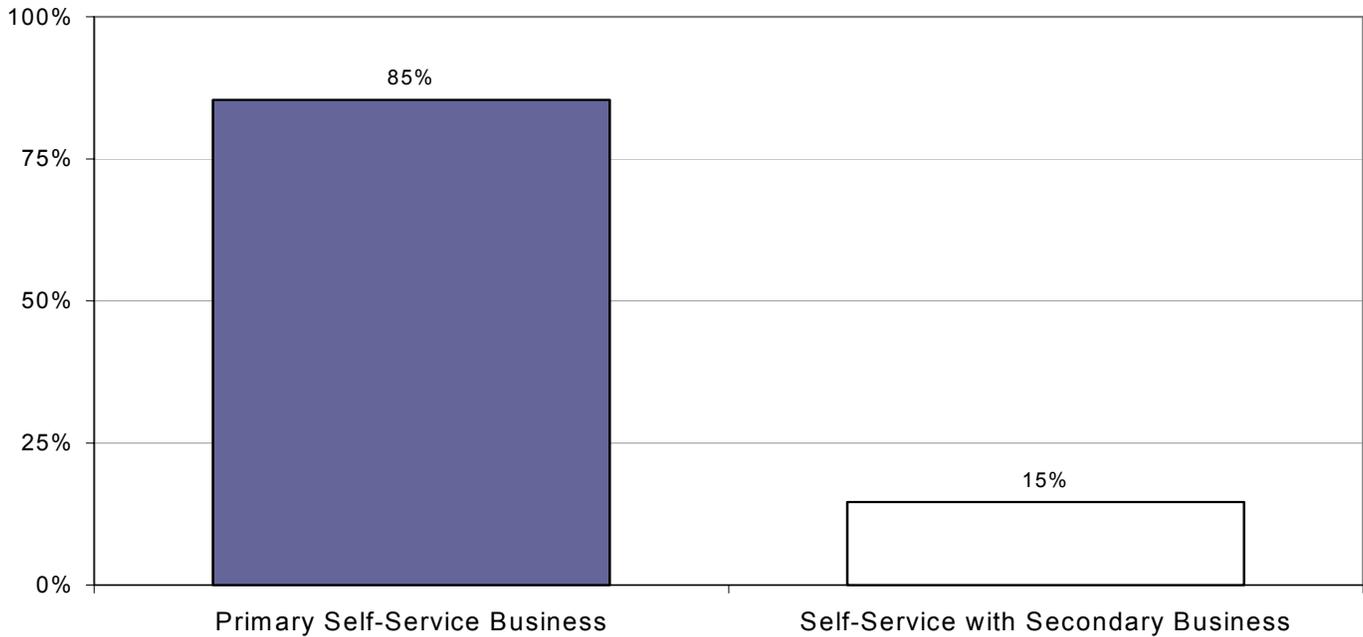
- = No data was submitted.

Self-Service Car Wash Results

Business Profile - continued

- ◆ The majority of self-service operators responding to this survey indicated that their primary business was car washing (i.e., Primary Self-Service); 15 percent indicated that their primary business was something other than car washing (i.e., Self-Service with Secondary Business). For the remainder of this section, data will be shown for those facilities that are primary self-service businesses compared to self-service car washes that have a secondary business (including, detailing, oil changes, in-bay automatic car washes and other business as listed in the other listing on the previous page).

Primary Business



- ◆ Overall, more self-service car washes were located in the Southwest region followed by the Midwest. For self-service operators owning secondary businesses, half reported that their facilities are located in the Northeast region.

Regions	Overall	Primary Self-Service Business	Self-Service with Secondary Business
Northeast (CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV)	19.8%	14.5%	50.0%
Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN)	18.5%	20.3%	8.3%
Southwest (AZ, CA, CO, HI, NM, NV, OK, TX, UT)	37.0%	37.7%	33.3%
Northwest (AK, ID, MT, OR, WA, WY)	3.7%	4.3%	-
Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)	21.0%	23.2%	8.3%

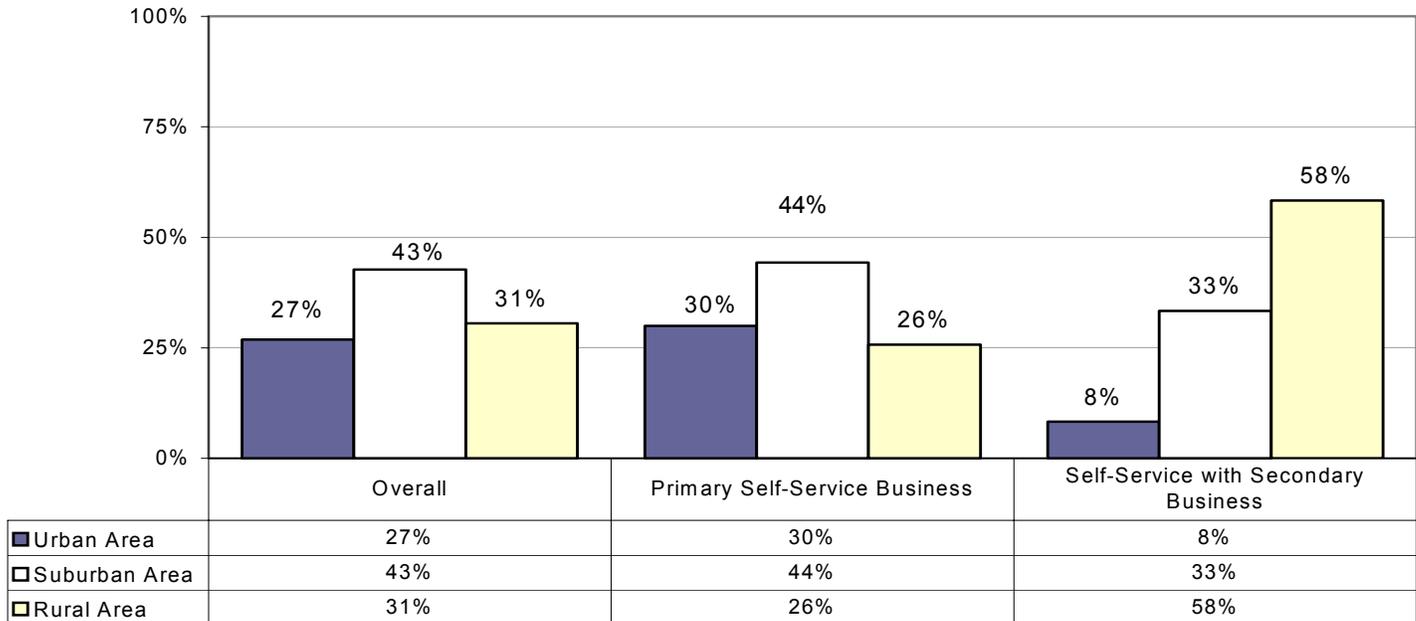
- = No data was submitted.

Self-Service Car Wash Results

Business Profile - continued

- ◆ According to 43 percent of the respondents, their businesses are located in suburban areas. The majority of self-service washes reported in this study were located in suburban areas. Self-service washes with secondary businesses were more likely than primary self-service business to be located in rural areas. In comparison, primary self-service businesses were more likely to be located in urban areas.

Size of Area Where Business is Located



Key: Urban area – population more than ½ million
 Suburban area or small city – population to ½ million
 Rural area – population less than 50,000

- ◆ Self-service respondents were most likely to be reporting on facilities built in the 1980s. Self-service businesses offering in-bay automatics, oil changes and other businesses were more like built in recent years.

Primary Business	Period Facility Built				Median Year Built
	1979 or earlier	1980 to 1989	1990 to 1999	2000 to 2002	
Overall	23.1%	33.3%	26.9%	16.7%	1987
Primary Self-Service Business	25.8%	33.3%	25.8%	15.2%	1987
Self-Service with Secondary Business	9.1%	36.4%	36.4%	18.2%	1990

Self-Service Car Wash Results

Car Volume & Price

- Overall, slightly more than a quarter of the reporting facilities sold between 25,000 and 50,000 cycles. Primary self-service businesses sold 92 percent more cycles on average than facilities with secondary businesses. Self-service with secondary businesses sold 51,591 cycles, while primary self-serves sold 98,947 cycles on average.

Number of Cycles Sold	Overall	Primary Self-Service Business	Self-Service with Secondary Business
Less than 25,000	9.3%	4.6%	40.0%
25,000 to 49,999	28.0%	27.7%	30.0%
50,000 to 74,999	13.3%	15.4%	-
75,000 to 84,999	5.3%	6.2%	-
85,000 to 99,999	5.3%	4.6%	10.0%
100,000 to 124,999	8.0%	9.2%	-
125,000 to 149,999	5.3%	4.6%	10.0%
150,000 or more	25.3%	27.7%	10.0%
Average in 2002	92,093	98,947	51,591

- = No data was submitted.

- Operators indicated that customers typically used two wash cycles. Customers were more likely to use one wash cycle if they were cleaning their vehicles at self-service stations with secondary businesses. Similar to the 2000 study, operators of urban facilities reported the use of more cycles, as did operators with the highest total gross income.

Business Profile	Number of Wash Cycles Typically Used			
	One	Two	Three	Four or more
Number used in 1998	8%	60%	22%	10%
Number used in 2000	4%	72%	19%	6%
Number used in 2002	11.5%	43.6%	33.3%	11.5%
By Business Profile:				
Overall	11.5%	43.6%	33.3%	11.5%
Primary Self-Service Business	5.9%	45.6%	36.8%	11.8%
Self-Service with Secondary Business	50.0%	30.0%	10.0%	10.0%
By Region:				
Northeast	21.4%	50.0%	14.3%	14.3%
Southeast	14.3%	57.1%	28.6%	-
Southwest	3.3%	46.7%	36.7%	13.3%
Northwest	-	33.3%	66.7%	-
Midwest	18.8%	25.0%	37.5%	18.8%
By Area Size:				
Urban	-	42.9%	38.1%	19.0%
Suburban	6.1%	54.5%	27.3%	12.1%
Rural	29.2%	29.2%	37.5%	4.2%
By 2002 Total Gross Income:				
Up to \$75,000	-	57.1%	42.9%	-
\$75,000 to \$149,000	11.8%	47.1%	35.3%	5.9%
\$150,000 or more	15.8%	42.1%	28.9%	13.2%

- = No data was submitted.

Self-Service Car Wash Results

Car Volume & Price - continued

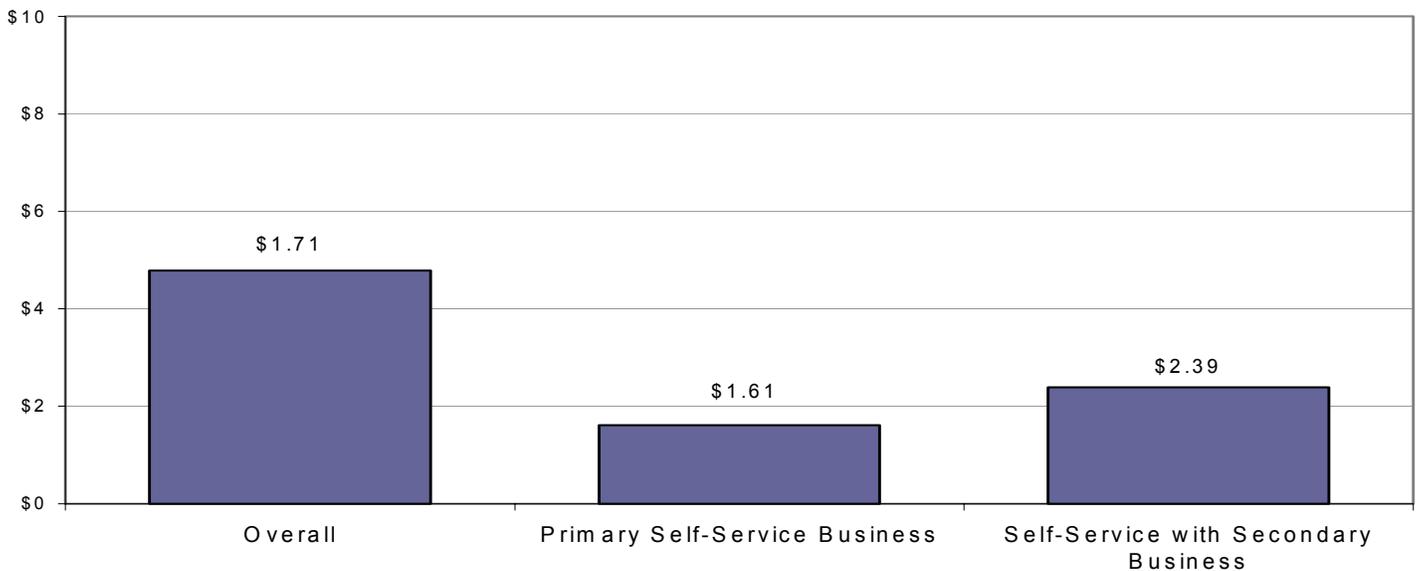
- ◆ In 2000, the average base wash cycle price decreased from 1998 by slightly less than 2 percent. In 2002, however, the base wash cycle price significantly increased from 2000 by 36 percent. Similar to the previous studies, the base wash cycle price was lowest on average in urban areas. In comparison, prices were highest on average in suburban areas at self-serves with secondary businesses. In 1998 and 2000, base prices were also highest in suburban areas.

Business Profile	Wash Cycle Base Price by Primary Business		
	Overall	Primary Self-Service Business	Self-Service with Secondary Business
Number used in 1998	\$1.28	**	**
Number used in 2000	\$1.26	**	**
Number used in 2002	\$1.71	\$1.61	\$2.39
By Region:			
Northeast	\$1.57	\$1.35	\$2.00
Southeast	\$1.69	\$1.25	*
Southwest	\$1.64	\$1.67	\$1.44
Northwest	\$1.42	\$1.42	-
Midwest	\$1.94	\$1.81	*
By Area Size:			
Urban	\$1.52	\$1.55	*
Suburban	\$1.76	\$1.58	\$3.50
Rural	\$1.85	\$1.75	\$2.11
By 2002 Total Gross Income:			
Up to \$75,000	\$1.40	\$1.44	*
\$75,000 to \$149,000	\$1.79	\$1.52	\$3.08
\$150,000 or more	\$1.65	\$1.65	\$1.80

** = Not Applicable.

* = Insufficient data to report.

Average Wash Base Price



Range of Base Prices:

Overall	\$0.25	\$6.50
Primary Self-Service Business	\$0.25	\$6.00
Self-Service with Secondary Business	\$0.75	\$6.50

Minimum:

\$0.25
\$0.25
\$0.75

Maximum:

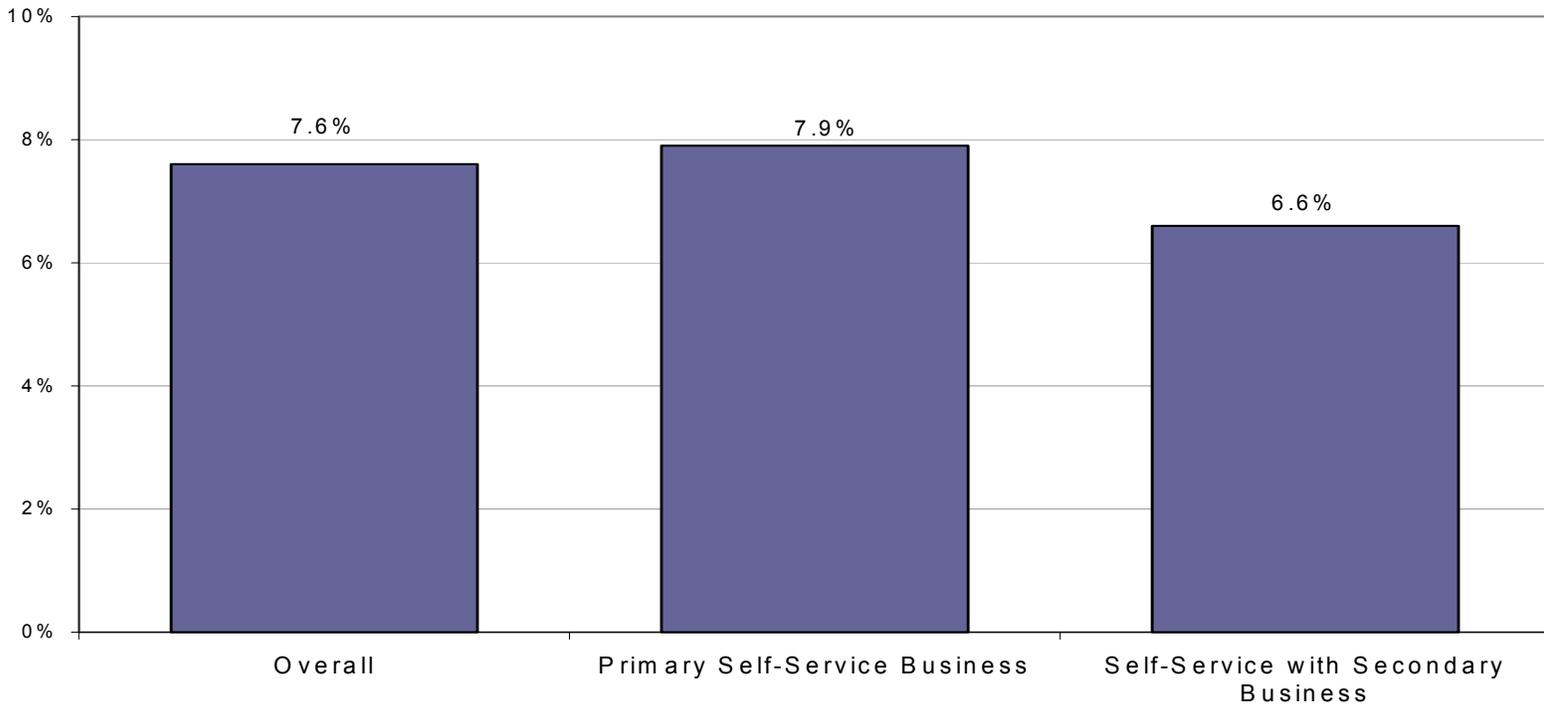
\$6.50
\$6.00
\$6.50

Self-Service Car Wash Results

Capture Rates

- ◆ Similar to conveyor facilities, self-service facilities captured about 8 percent of the traffic that passed by their businesses in 2002. Capture rates were similar at high volume full-service facilities (i.e., operations washing more than 65,000 cars per year) and self-service only facilities.

Percentage of Traffic Captured in 2002



Capture Rates by Primary Business

Business Profile	Overall	Primary Self-Service Business	Self-Service with Secondary Business
By Region:			
Northeast	11.3%	17.0%	3.4%
Southeast	2.2%	2.2%	-
Southwest	5.5%	4.4%	16.5%
Northwest	60.0%	60.0%	-
Midwest	7.78%	8.4%	3.0%
By Area Size:			
Urban	3.2%	3.2%	3.0%
Suburban	9.0%	7.8%	30.0%
Rural	10.0%	13.3%	3.3%
By 2002 Total Gross Income:			
Up to \$75,000	4.2%	4.6%	1.0%
\$75,000 to \$149,000	3.7%	3.7%	-
\$150,000 or more	8.5%	8.9%	7.8%

- = No data was submitted.

Self-Service Car Wash Results

Services & Profit Centers

- ◆ The most commonly offered services were vacuuming, vending and carpet/fragrance machines.

Extra Services	Overall	Primary Self-Service Business	Self-Service with Secondary Business
Air	13.3%	12.9%	16.7%
Carpet/Fragrance Machines	74.7%	78.6%	58.3%
Soda/snack vending machines	45.8%	44.3%	58.3%
Triple foam	37.3%	38.6%	33.3%
Vacuuming	96.4%	98.6%	91.7%
Vending	94.0%	97.1%	83.3%
Washcards/keys/tokens	30.1%	30.0%	33.3%
*Other	4.8%	2.9%	16.7%

*Other (3 responses)

- Laundry and electrical services.
- Rug beater and stand alone car dryer.
- Outside dryer.

- ◆ Operators typically reported multiple vacuums per facility. In both 2000 and 2002, urban facilities with the highest number of bays and gross annual income reported having the most vacuums on average.

Number of Vacuums Sold at Facility by Primary Business			
Business Profile	Overall	Primary Self-Service Business	Self-Service with Secondary Business
Average in 1998	5.81	**	**
Average in 2000	6.10	**	**
Average in 2002	8.86	8.93	9.00
By Region:			
Northeast	9.00	10.30	6.40
Southeast	10.71	11.38	2.00
Southwest	10.36	9.58	15.00
Northwest	7.67	7.67	-
Midwest	5.47	5.50	5.00
By Area Size:			
Urban	13.00	11.60	41.00
Suburban	8.31	8.66	5.00
Rural	6.32	6.39	6.14
By 2002 Gross Annual Income:			
Up to \$75,000	4.86	4.92	4.00
\$75,000 to \$149,000	6.29	6.64	4.67
\$150,000 or more	10.74	10.56	13.40

- = No data was submitted.

** = Not Applicable.

Self-Service Car Wash Results

Services & Profit Centers - continued

- ◆ In general, the majority of self-service facilities do not plan to offer additional services at their locations. Currently, facilities grossing \$150,000 or more tend to offer additional services or profit centers.

Additional Services	Currently Offer	Plan to offer in 1-2 Years	Do not plan to Offer
ATM	5.6%	9.9%	84.5%
Convenience Store	8.3%	-	91.7%
Express Detailing	8.5%	7.0%	84.5%
Gas Station	9.9%	-	90.1%
Oil Change/Quick Lube	8.5%	1.4%	90.1%
*Other	7.1%	7.1%	85.7%

Additional Services by Area Size

Services	Urban			Suburban			Rural		
	Currently Offer	Plan to offer in 1-2 Years	Do not plan to offer	Currently Offer	Plan to offer in 1-2 Years	Do not plan to offer	Currently Offer	Plan to offer in 1-2 Years	Do not plan to offer
ATM	-	7.1%	92.9%	9.4%	9.4%	81.3%	4.0%	12.0%	84.0%
Convenience Store	13.3%	-	86.7%	9.4%	-	90.6%	4.0%	-	96.0%
Express Detailing	14.3%	14.3%	71.4%	9.4%	6.3%	84.4%	4.0%	4.0%	92.0%
Gas Station	7.1%	-	92.9%	15.6%	-	84.4%	4.0%	-	96.0%
Oil Change/Quick Lube	13.3%	6.7%	80.0%	6.5%	-	93.5%	8.0%	-	92.0%
*Other	16.7%	16.7%	66.7%	7.1%	-	92.9%	-	12.5%	87.5%

Additional Services by Gross Income

Services	Up to \$75,000			\$75,000-\$149,000			\$150,000 or more		
	Currently Offer	Plan to offer in 1-2 Years	Do not plan to offer	Currently Offer	Plan to offer in 1-2 Years	Do not plan to offer	Currently Offer	Plan to offer in 1-2 Years	Do not plan to offer
ATM	8.3%	8.3%	83.3%	7.7%	-	92.3%	2.8%	13.9%	83.3%
Convenience Store	8.3%	-	91.7%	14.3%	-	85.7%	5.6%	-	94.4%
Express Detailing	16.7%	-	83.3%	-	-	100.0%	8.1%	8.1%	83.8%
Gas Station	8.3%	-	91.7%	7.7%	-	92.3%	11.1%	-	88.9%
Oil Change/Quick Lube	-	-	100.0%	15.4%	-	84.6%	11.1%	2.8%	86.1%
*Other	-	-	100.0%	-	12.5%	87.5%	15.4%	7.7%	76.9%

- = No data was submitted.

* Other (5 responses)

- Considering some finishing touches type detailing-exterior only.
- Drive-thru automatic.
- Electrical and laundry services.
- Fast Food Stand.
- Storage.

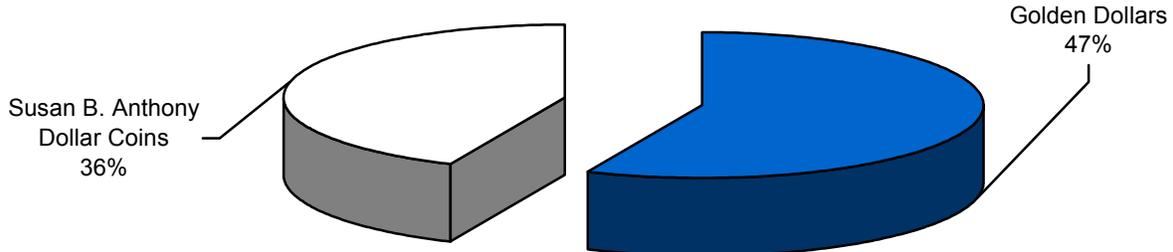
Self-Service Car Wash Results

Discounts/Promotions

- ◆ According to survey participants, paid-in-advance wash tokens were most-often offered. Washcards/keys/tokens were the least offered promotions followed by credit cards. More facilities, however, accept golden dollars than Susan B. Anthony dollar coins.

Discounts/Promotions	Yes, at all of my facilities	At some of my facilities	No Longer Offered	Never Used
Credit cards	39.7%	13.2%	-	47.1%
Dollar coins	39.4%	19.7%	3.0%	37.9%
Paid-in-advance Wash Tokens	42.4%	16.7%	3.0%	37.9%
Washcards/Keys/Tokens	25.8%	21.2%	1.5%	51.5%

Type of Dollar Coins Used



Percentage of Water Recycled

- ◆ Most operators responding to this question *did not recycle water*. However, more facilities recycled water in 2002 (30%) than in 2000 (18%) at their facilities.

Percent of Water Recycled	Overall	Primary Self-Service Business	Self-Service with Secondary Business
1 to 10 percent	11.4%	9.8%	22.2%
11 to 20 percent	2.9%	3.3%	-
21 to 30 percent	5.7%	6.6%	-
31 to 40 percent	1.4%	1.6%	-
41 to 50 percent	2.9%	3.3%	-
51 to 75 percent	2.9%	3.3%	-
More than 75 percent	2.9%	3.3%	-
Total Recycling Water	30.0%	31.1%	22.2%
I do not Recycle Water	70.0%	68.9%	77.8%

- = No data was submitted.

Self-Service Car Wash Results

Most Profitable Season

- ◆ Unlike conveyor and in-bay automatic facilities, self-service businesses reported that their most profitable season was spring followed closely by winter in 2002.

Seasons	Most Profitable 1	2	3	Least Profitable 4	Mean Score
Spring	27.8%	47.2%	18.1%	6.9%	2.04
By Area Size:					
Urban	16.7%	55.6%	11.1%	16.7%	2.28
Suburban	33.3%	40.0%	20.0%	6.7%	2.00
Rural	30.4%	52.2%	17.4%	-	1.87
Summer	15.3%	18.1%	26.4%	40.3%	2.92
By Area Size:					
Urban	27.8%	22.2%	27.8%	22.2%	2.44
Suburban	13.3%	16.7%	20.0%	50.0%	3.07
Rural	8.7%	17.4%	34.8%	39.1%	3.04
Fall	5.6%	22.2%	44.4%	27.8%	2.94
By Area Size:					
Urban	16.7%	16.7%	38.9%	27.8%	2.78
Suburban	3.3%	26.7%	46.7%	23.3%	2.90
Rural	-	17.4%	47.8%	34.8%	3.17
Winter	52.1%	13.7%	9.6%	24.7%	2.07
By Area Size:					
Urban	38.9%	11.1%	16.7%	33.3%	2.44
Suburban	51.6%	16.1%	12.9%	19.4%	2.00
Rural	60.9%	13.0%	-	26.1%	1.91

Scale: 1 = Most Profitable Season and 4 = Least Profitable Season.

- = No data was submitted.

Season	Mean Score by Regions					
	Overall	Northeast	Southeast	Southwest	Northwest	Midwest
Spring	2.04	2.31	1.27	2.32	1.50	1.75
Summer	2.92	3.38	3.55	2.36	1.50	3.13
Fall	2.94	3.25	2.91	2.56	3.00	3.31
Winter	2.07	1.06	2.27	2.72	3.00	1.81

Scale: 1 = Most Profitable Season and 4 = Least Profitable Season.

Self-Service Car Wash Results

Labor/Labor Expenses

- ◆ The table below shows the number of full-time and part-time employees typically employed at self-service businesses. The average number of hours worked for full-time employees was 35 hours per week in 2002. When healthcare is provided, more operators are likely to provide medical insurance to full-time employees than any other benefit.

Number of Employees	Overall	Primary Self-Service Business	Self-Service with Secondary Business
Full-time Employees:			
0	17.5%	16.7%	22.2%
1	31.6%	35.4%	11.1%
2 to 5	33.3%	35.4%	22.2%
6 to 9	7.0%	4.2%	22.2%
10 or more	10.5%	8.3%	22.2%
Part-time Employees:			
0	15.5%	18.6%	-
1	35.2%	35.6%	33.3%
2 to 5	38.0%	37.3%	41.7%
6 to 9	1.4%	1.7%	-
10 or more	9.9%	6.8%	25.0%
Hours Worked:			
Full-time hours worked per week	35.44	36.12	31.67
Part-time hours worked per week	18.74	18.21	21.25

- = No data was submitted.

Benefits offered	Full-time Employees	Part-time Employees
Medical Insurance	27.7%	2.4%
Dental Plan	12.0%	-
Life Insurance	12.0%	1.2%
Other	6.0%	8.4%

- = No data was submitted.

Self-Service Car Wash Results

Income, Cost of Goods and Expenses

The following pages contain information on the income, cost of goods and expenses reported in this survey. On each page, data tables contain dollar per cycle ratios, averages and the percentage of income those averages represent. Please note that because not all respondents reported for all line items, the average of each line item will not add to the total average. For example, some facilities only reported totals without reporting line item detail. All efforts have been made to ensure that this data is representative and accurate for those reporting.

Dollar Per Cycle

This **ratio** was derived using the amount reported for each item divided by the reported number of cycles sold at that facility during the year. For example, if a car wash facility reported a wash income of \$75,000 and reported selling 60,000 cycles, the dollar per cycle for the wash would be \$1.25. The dollar per cycle ratio was first calculated for each individual facility and then averaged as shown.

Average

For each item, an average income, cost of goods or expenses was calculated for those reporting. Therefore, this average does not include "0" amounts.

Percent (%) of Income

The percentage that the above average was of the income is also reported. This percentage was calculated using the average for a particular item divided by the income average only for those reporting for each corresponding item. For example, if a facility reported labor costs but did not report an income amount, their labor costs, as a percent of income, would not be included in the average.

Some costs and expenses have been grouped as necessary due to the way in which some facilities reported detail line items. They are as follows:

- ◆ *Total Labor Costs* (not including quick lube) includes labor, payroll management and payroll taxes.
- ◆ *Utilities* includes gas and electric.

On all pages, an asterisk represents insufficient data. For this reason, figures were not presented.

Self-Service Car Wash Results

Income

Respondents were asked to list income items separately and add all items to equal the total gross income.

The first table presents average operating income by self-service overall, primary self-service and self-service with secondary businesses. Please note, those reporting only totals are included in this first table, but for proceeding tables these respondents were excluded because they did not provide itemized figures that were then used to calculate dollar per car and percent of operating income.

Primary Business	Financial Totals		
	Average Operating Income	Total Cost of Goods	Total Operation Expenses
Self-Service Overall	\$314,029	\$132,829	\$110,429
Primary Self-Service	\$294,303	\$111,304	\$75,612
Self-Service with Secondary Businesses	\$442,732	\$257,885	\$303,786

Respondents were asked to list income items separately and add all items to equal the total gross income. The table below shows the percentage of respondents reporting income for each item, the average amount of income when it was reported (therefore not including "0" amounts) and the percentage that average was of the total gross income. For the "% of Operating Income" the average of each item was divided by the total gross income average only for those reporting for each corresponding item.

- ◆ Total Gross Income was primarily derived from wash income. Vacuums did provide 10 percent of income both overall and for those facilities reporting to be primarily self-service washes.

Income Item	Self-Service Business		
	\$ Per Cycle	Average	% of Operating Income
Wash	\$2.83	\$158,475	82.07%
Vacuums	\$0.29	\$19,920	10.32%
Vending sales	\$0.14	\$9,971	5.16%
Miscellaneous	\$0.09	\$30,764	15.93%
TOTAL Gross Income/Average Operating Income	\$3.24	\$193,094	-

Income Item	Self-Service Business			Self-Service with Secondary Business		
	\$ Per Cycle	Average	% of Operating Income	\$ Per Cycle	Average	% of Operating Income
Wash	\$2.28	\$159,588	82.34%	\$6.01	\$164,609	91.86%
Vacuums	\$0.28	\$20,313	10.48%	\$0.30	\$12,709	7.09%
Vending sales	\$0.13	\$10,729	5.54%	\$0.20	\$4,412	2.46%
Miscellaneous	\$0.06	\$24,143	12.46%	\$0.20	\$7,317	4.08%
TOTAL Gross Income/Average Operating Income	\$2.69	\$193,810	-	\$6.44	\$179,197	-

Self-Service Car Wash Results

Cost of Goods Sold

Respondents were asked to list cost of goods sold separately and add all to equal the total cost of goods sold. The table below shows the percentage of respondents reporting costs for each item, the average cost of each when it was reported (therefore not including "0" amounts) and the percentage that average cost was of the total cost of goods sold. For the "% of Operating Income" the average of each item was divided by the total cost of goods sold average only for those reporting for each corresponding item.

- ◆ When labor was reported, it made up the largest percentage of the total cost of goods sold. Gas and electric costs, which were reported by the majority of respondents, typically were a larger cost than wash supplies.

Cost of Goods Sold	Self-Service Business		
	\$ Per Cycle	Average	% of Operating Income
Utilities (Gas, Electric)	\$0.24	\$10,754	5.57%
Total Labor Cost	\$0.66	\$32,621	16.89%
Pit cleaning	\$0.03	\$1,490	0.77%
Refunds	\$0.01	\$408	0.21%
Vending items	\$0.07	\$4,357	2.26%
Wash supplies	\$0.24	\$12,371	6.41%
Water and sewer	\$0.14	\$7,008	3.63%
TOTAL Cost of Goods Sold	\$1.23	\$61,795	32.00%
Average Operating Income	\$3.24	\$193,094	-

Cost of Goods Sold	Self-Service Business			Self-Service with Secondary Business		
	\$ Per Cycle	Average	% of Operating Income	\$ Per Cycle	Average	% of Operating Income
Utilities (Gas, Electric)	\$0.17	\$10,245	5.29%	\$0.61	\$12,275	6.85%
Total Labor Cost	\$0.36	\$29,945	15.45%	\$2.05	\$46,000	25.67%
Pit cleaning	\$0.02	\$1,427	0.74%	\$0.05	\$1,850	1.03%
Refunds	\$0.01	\$298	0.15%	\$0.07	\$980	0.55%
Vending items	\$0.07	\$4,730	2.44%	\$0.05	\$1,553	0.87%
Wash supplies	\$0.19	\$11,917	6.15%	\$0.48	\$11,925	6.65%
Water and sewer	\$0.11	\$6,632	3.42%	\$0.32	\$7,372	4.11%
TOTAL Cost of Goods Sold	\$0.80	\$59,911	30.40%	\$3.44	\$76,248	42.55%
Average Operating Income	\$2.69	\$193,810	-	\$6.44	\$179,197	-

Note: Some costs have been grouped as necessary. *Total Labor Cost* includes labor, payroll management and payroll taxes.

Self-Service Car Wash Results

Operation Expenses

Respondents were asked to list expense items separately and add all items to equal the total expense. The table below shows the percentage of respondents reporting expenses for each item, the average amount of the expense when it was reported (therefore not including "0" amounts) and the percentage that average was of the total expense. For the "% of Operating Income" the average of each item was divided by the total expense average only for those reporting for each corresponding item.

- ◆ Interest, depreciation and miscellaneous expenses made up the largest percentage of the total expenses.

Expense Item	Self-Service Business		
	\$ Per Cycle	Average	% of Operating Income
Advertising	\$0.07	\$3,502	1.81%
Insurance	\$0.09	\$4,085	2.12%
Office Supplies	\$0.02	\$1,042	0.54%
Professional fees	\$0.05	\$1,948	1.01%
Property taxes	\$0.12	\$5,153	2.67%
Repairs General	\$0.23	\$11,274	5.84%
Waste haul	\$0.02	\$1,389	0.72%
Interest	\$0.82	\$26,628	13.79%
Depreciation	\$0.57	\$31,787	16.46%
Miscellaneous	\$0.18	\$41,333	21.41%
TOTAL Expenses	\$1.59	\$68,867	35.67%
Average Operating Income	\$3.24	\$193,094	-

Expense Item	Self-Service Business			Self-Service with Secondary Business		
	\$ Per Cycle	Average	% of Operating Income	\$ Per Cycle	Average	% of Operating Income
Advertising	\$0.04	\$3,427	1.77%	\$0.16	\$3,786	2.11%
Insurance	\$0.06	\$3,936	2.03%	\$0.24	\$5,443	3.04%
Office Supplies	\$0.01	\$1,008	0.52%	\$0.08	\$1,375	0.77%
Professional fees	\$0.02	\$1,656	0.85%	\$0.28	\$4,867	2.72%
Property taxes	\$0.08	\$5,050	2.61%	\$0.32	\$6,656	3.71%
Repairs General	\$0.15	\$10,046	5.18%	\$0.77	\$22,613	12.62%
Waste haul	\$0.02	\$1,423	0.73%	\$0.05	\$1,009	0.56%
Interest	\$0.42	\$22,551	11.64%	\$2.40	\$37,079	20.69%
Depreciation	\$0.47	\$29,017	14.97%	\$1.22	\$45,770	25.54%
Miscellaneous	\$0.18	\$41,333	21.33%	-	-	-
TOTAL Expenses	\$1.00	\$61,489	31.73%	\$4.73	\$103,214	57.60%
Average Operating Income	\$2.69	\$193,810	-	\$6.44	\$179,197	-

Appendix



International Carwash Association
Serving the Professional Car Care
Industry

2002 Cost of Doing Business Conveyor Car Wash Survey

Thank you for taking the time to complete this questionnaire. Please complete as many questions as possible, to the best of your knowledge. Return your completed survey by either Email to afrijlich@sba.com, fax at 312/527-6732 or mail to Smith, Bucklin & Associates, Inc., Market Research & Statistics Division at 401 North Michigan Avenue, Suite 2200, Chicago, IL 60611 by no later than Friday, November 7. Those who complete this survey will receive a **COMPLIMENTARY COPY** of the comprehensive final report, otherwise it will be available through the International Carwash Association. In addition, survey participants will be entered into a **GRAND PRIZE DRAWING TO WIN** one of two **FREE 2004 Car Care World Expo registrations if they submit their surveys by the Early-bird Deadline of Thursday, June 26.** Be sure to provide your contact information below in order to receive your **COMPLIMENTARY COPY** of the final report and to be entered into the **GRAND PRIZE DRAWING.** By supplying this information, you will NOT expose your individual company data. You will however, strengthen the reliability of the results of the survey.

CONFIDENTIALITY IS GUARANTEED

The Market Research & Statistics Division of Smith, Bucklin & Associates, Inc will handle all returned surveys. Under no circumstances will any individual association member, including the Board of Directors or the Executive Director, be allowed access to individual company data. Our professional reputation depends on our adherence to these policies. As an additional safeguard, returned surveys are destroyed upon completion of the reporting cycle.

General Instructions

All questions pertaining to your business "last year" refer to calendar year 2002 OR your last fiscal year. All questions, unless otherwise specified, relate to your car wash business sales and expenses. **Answer this survey questionnaire per facility.** *Copy pages 2, 3 and 4 of this form as needed to report on two or more facilities.* Because we are asking for total expenditures and sales figures to derive expenses **per car**, please **be sure to answer question a, Section II** ("How many cars did you wash at your business last year?"). If you cannot give us an exact figure, please give us your best estimate (or answer within a range). Remember that this information is totally confidential and no ICA staff or board member will have access to this information.

Where should we send your **FREE COPY** of the final report? PLEASE TYPE or PRINT.

<input type="text"/>	<input type="text"/>
FIRST NAME	LAST NAME
<input type="text"/>	
COMPANY NAME	
<input type="text"/>	
STREET ADDRESS	
<input type="text"/>	<input type="text"/>
CITY	STATE ZIP/POSTAL CODE
<input type="text"/>	<input type="text"/>
COUNTRY (if other than U.S.)	PROVINCE (If Canada)
<input type="text"/>	Are you an ICA member? Yes <input type="checkbox"/> No <input type="checkbox"/>
PHONE	

I. Business Profile

a) What is your primary business?

- 1 Full-Service Conveyor Car Wash
- 2 Exterior Conveyor Car Wash
- 3 Other (specify): _____

b) How many facilities of each type do you own/operate? (Write in the number of each.)

- Car Wash(es)
- Detail Shop(s) (at the same location)
- Detail Shop(s) (stand-alone)
- Other(s) _____

c) In which state is your business located?

- 1 Northeast (CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV)
- 2 Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN)
- 3 Southwest (AZ, CA, CO, HI, NM, NV, OK, TX, UT)
- 4 Northwest (AK, ID, MT, OR, WA, WY)
- 5 Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)

d) In what type of area is your business located?

- 1 Urban area (population more than 1/2 million)
- 2 Suburban area or small city (population to 1/2 million)
- 3 Rural area (population less than 50,000)

e) In what year was your facility built? _____

II. Car Volume & Price

a) How many cars did you wash at your business in 2002? # _____

If you cannot give an exact figure, please answer within a range (include all paid AND free car washes)

- 1 Less than 25,000 3 50,000 - 74,999 5 85,000 - 99,999 7 125,000 - 149,999
- 2 25,000 - 49,999 4 75,000 - 84,999 6 100,000 - 124,999 8 150,000 or more

b) What percentage of your car washes were free or complimentary? _____%

c) What percentage of your total sales was in package washes? _____%

d) Did the number of cars you washed at your business last year increase, decrease or remain the same?

- 1 Increased by _____%
- 2 Decreased by _____%
- 3 Remained the same

e) What was the base price for a wash at your facility in 2002 ("base" = lowest priced wash)? \$ _____

f) What percentage of the traffic that passes by your business do you capture (i.e., capture rate)? _____%

III Profit Centers

a) Do you offer any of the following profit centers at the same location as this facility? (Check all that apply.)

Additional Services	Currently Offer	Plan to Offer in 1-2 Years	Do Not Plan to Offer
ATM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Express Detailing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gas Station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oil Change/Quick Lube	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you selected "Other" above, please specify: _____

IV. Income & Expenses

Please note, the International Carwash Association will be reporting only the TOTAL figures in the final report. The itemized categories are provided to assist you with deriving the TOTAL figures. If you cannot provide an exact figure for the following, please give a "best" estimate:

■ **LABOR/LABOR EXPENSES**

Include ALL employees (office management, production labor, cashiers, maintenance personnel, etc.) used to produce car wash sales reported in Car Volume & Price. When reporting total annual expenditure, please include expenses for all fully burdened employees.

a) How many full-time and part-time positions did you employ on average last year?

Full-time # _____ Part-time # _____

b) What is the average number of hours worked weekly by employees at this facility?

Number of Full-time Hours per Week # _____

Number of Part-time Hours per Week # _____

c) Do you offer any of the following benefits for full-time and/or part-time employees? (Check all that apply)

Benefits	Full-time Employees	Part-time Employees
Medical Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Dental Plan	<input type="checkbox"/>	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

■ **COST OF GOODS SOLD (in 2002)**

Labor (salaries and wages only) - Wash	\$
Labor (salaries and wages only) - Quick Lube	\$
Payroll Management	\$
Payroll Taxes - Wash	\$
Payroll Taxes - Quick Lube	\$
Contract Labor	\$
COGS -Fuel	\$
COGS - Merchandise	\$
COGS - Quick Lube	\$
COGS - Wash Supplies	\$
Repairs - Equipment	\$
Credit Card Fees	\$
Customer Damage - Wash	\$
Customer Damage - Quick Lube	\$
TOTAL COST OF GOODS	\$

■ **GROSS INCOME (in 2002)**

Car Wash - Full-Service	\$
Car Wash - Exterior	\$
Quick Lube	\$
Extra Services	\$
Detail	\$
Fuel	\$
Merchandise	\$
Vending Sales	\$
Gift Certificate Sales/Pre-pays/Ticket Books	\$
Gain on Sale (Capital Asset)	\$
Redeemed Gift Certs./Pre-pays/Ticket Books	\$
Miscellaneous (all other income)	\$
TOTAL GROSS INCOME	\$

IV. Income & Expenses - continued

Please note, the International Carwash Association will be reporting only the TOTAL figures in the final report. The itemized categories are provided to assist you with deriving the TOTAL figures. If you cannot provide an exact figure for the following, please give a "best" estimate:

■ **OPERATION EXPENSES (in 2002)**

Advertising	\$
Auto Expense	\$
Bad Debts	\$
Bank Charges	\$
Over/Short	\$
Contributions/Donations	\$
Entertainment/Travel	\$
Insurance - Liability	\$
Insurance - Worker's Compensation	\$
Insurance - Health	\$
Insurance - Life	\$
Office Supplies	\$
Professional Fees	\$
Repairs - General	\$
Storage	\$
Uniforms	\$
Utilities - Water	\$
Utilities - Electricity	\$
Utilities - Gas	\$
Utilities - Telephone	\$
Miscellaneous (all other income)	\$
TOTAL OPERATION EXPENSES	\$

■ **OTHER INCOME (in 2002)**

Gain/loss on sale of capital assets	\$
Interest Earned	\$
Rental Income	\$
Miscellaneous (all other income)	\$
TOTAL OPERATION EXPENSES	\$

■ **OTHER EXPENSES (in 2002)**

Depreciation	\$
Interest Expense	\$
Lease - Building	\$
Lease Equipment	\$
R & D	\$
Taxes - Property	\$
TOTAL OPERATION EXPENSES	\$

V. Other

a) Have you ever offered any of the following...?

	Yes, at ALL of my facilities	At SOME of my facilities	NO LONGER OFFERED	NEVER USED
Annual Passes.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Coupons	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Frequency Wash Programs.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Paid-in-advance Wash Tokens	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Special Promotions (for example, holiday discounts)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Offer a Rain Guarantee	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

b) What percentage of your water do you recycle?

- | | | | |
|---------------------------------------|---------------------------------------|---------------------------------------|---|
| 1 <input type="checkbox"/> 1% to 10% | 3 <input type="checkbox"/> 21% to 30% | 5 <input type="checkbox"/> 41% to 50% | 7 <input type="checkbox"/> More than 75% |
| 2 <input type="checkbox"/> 11% to 20% | 4 <input type="checkbox"/> 31% to 40% | 6 <input type="checkbox"/> 51% to 75% | 8 <input type="checkbox"/> I do not recycle water |

c) During which seasons is your business the most profitable? Rank the seasons from 1 to 4, where "1" indicates the most profitably season and "4" indicates the least profitable season.

- Spring (March, April and May)
- Summer (June, July and August)
- Fall (September, October November)
- Winter (December, January and February)

Thank you for completing this questionnaire.

Early-bird Deadline: June 26, 2003 Deadline: November 7, 2003
 Mail, Email or fax to Smith, Bucklin & Associates, Inc., Market Research & Statistics Division
 401 North Michigan Avenue, Suite 2200, Chicago, IL 60611 FAX: 312/527-6732 Email: afrijlich@sba.com



International Carwash Association
Serving the Professional Car Care
Industry

2002 Cost of Doing Business

In-Bay Automatic Car Wash Survey

Thank you for taking the time to complete this questionnaire. Please complete as many questions as possible, to the best of your knowledge. Return your completed survey by either Email to afrijelich@sba.com, fax at 312/527-6732 or mail to Smith, Bucklin & Associates, Inc., Market Research & Statistics Division at 401 North Michigan Avenue, Suite 2200, Chicago, IL 60611 by no later than **Friday, November 7**. Those who complete this survey will receive a **COMPLIMENTARY COPY** of the comprehensive final report, otherwise it will be available through the International Carwash Association. In addition, survey participants will be entered into a **GRAND PRIZE DRAWING TO WIN** one of two **FREE 2004 Car Care World Expo registrations if they submit their surveys by the Early-bird Deadline of Thursday, June 26**. Be sure to provide your contact information below in order to receive your **COMPLIMENTARY COPY** of the final report and to be entered into the **GRAND PRIZE DRAWING**. By supplying this information, you will NOT expose your individual company data. You will however, strengthen the reliability of the results of the survey.

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General Instructions

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Where should we send your **FREE COPY** of the final report? PLEASE TYPE or PRINT.

<input type="text"/>	<input type="text"/>
FIRST NAME	LAST NAME
<input type="text"/>	
COMPANY NAME	
<input type="text"/>	
STREET ADDRESS	
<input type="text"/>	<input type="text"/>
CITY	STATE ZIP/POSTAL CODE
<input type="text"/>	<input type="text"/>
COUNTRY (if other than U.S.)	PROVINCE (If Canada)
<input type="text"/>	Are you an ICA member? Yes <input type="checkbox"/> No <input type="checkbox"/>
PHONE	

I. Business Profile

a) What is your primary business?

- 1 In-Bay Automatic Car Wash
2 Self-Service Car Wash
3 Gas Station
4 Oil Change
5 Other (specify): _____

b) How many facilities of each type do you own/operate? (Write in the number of each.)

- In-Bay Automatic Car Wash
 Self-Service Car Wash
 Gas Station(s)
 Oil Change(s)
 Other(s): _____

c) If your car wash cloth, bristle or touch-free? 1 Cloth 2 Bristle 3 Touch-free

d) In which state is your business located?

- 1 Northeast (CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV)
2 Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN)
3 Southwest (AZ, CA, CO, HI, NM, NV, OK, TX, UT)
4 Northwest (AK, ID, MT, OR, WA, WY)
5 Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)

e) In what type of area is your business located?

- 1 Urban area (population more than 1/2 million)
2 Suburban area or small city (population to 1/2 million)
3 Rural area (population less than 50,000)

f) In what year was your facility built? _____

II. Car Volume & Price

a) How many cars did you wash in 2002? # _____

If you cannot give us an exact figure, please estimate by answering within a range.

- 1 Less than 25,000 3 50,000 - 74,999 5 85,000 - 99,999 7 125,000 - 149,999
2 25,000 - 49,999 4 75,000 - 84,999 6 100,000 - 124,999 8 150,000 or more

b) What percentage of your car washes were free or complimentary? _____%

e) Did the number of cars you washed at your business last year increase, decrease or remain the same?

- 1 Increased by _____%
2 Decreased by _____%
3 Remained the same

f) If applicable, what was the regular base price without gas purchase and the price with gas for an in-bay automatic wash at your facility last year?

Regular wash without gas \$ _____
Regular wash with gas \$ _____

e) What is the range of prices at your facility? From: \$ _____ to \$ _____

f) When did you have your last base price increase? Month: _____ Year: _____

g) What percentage of the traffic that passes by your business do you capture (i.e., capture rate)? _____%

III Profit Centers

b) Do you offer any of the following profit centers at the same location as this facility? (Check all that apply.)

Additional Services	Currently Offer	Plan to Offer in 1-2 Years	Do Not Plan to Offer
ATM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Express Detailing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gas Station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oil Change/Quick Lube	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you selected "Other" above, please specify: _____

IV. Income & Expenses

Please note, the International Carwash Association will be reporting only the TOTAL figures in the final report. The itemized categories are provided to assist you with deriving the TOTAL figures. If you cannot provide an exact figure for the following, please give a "best" estimate:

■ LABOR/LABOR EXPENSES

Include ALL employees (office management, production labor, cashiers, maintenance personnel, etc.) used to produce car wash sales reported in Car Volume & Price. When reporting total annual expenditure, please include expenses for all fully-burdened employees.

d) How many full-time and part-time positions did you employ on average last year?

Full-time # _____ Part-time # _____

e) What is the average number of hours worked weekly by employees at this facility?

Number of Full-time Hours per Week # _____

Number of Part-time Hours per Week # _____

f) Do you offer any of the following benefits for full-time and/or part-time employees? (Check all that apply)

Benefits	Full-time Employees	Part-time Employees
Medical Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Dental Plan	<input type="checkbox"/>	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

■ COST OF GOODS SOLD (in 2002)

Labor (salaries and wages only) - Wash	\$
Labor (salaries and wages only) - Quick Lube	\$
Payroll Management	\$
Payroll Taxes - Wash	\$
Payroll Taxes - Quick Lube	\$
Contract Labor	\$
COGS -Fuel	\$
COGS - Merchandise	\$
COGS - Quick Lube	\$
COGS - Wash Supplies	\$
Repairs - Equipment	\$
Credit Card Fees	\$
Customer Damage - Wash	\$
Customer Damage - Quick Lube	\$
TOTAL COST OF GOODS	\$

IV. Income & Expenses - continued

Please note, the International Carwash Association will be reporting only the TOTAL figures in the final report. The itemized categories are provided to assist you with deriving the TOTAL figures. If you cannot provide an exact figure for the following, please give a "best" estimate:

■ **GROSS INCOME (in 2002)**

Car Wash	\$
Quick Lube	\$
Extra Services	\$
Detail	\$
Gas	\$
Merchandise	\$
Vending Sales	\$
Gift Certificate Sales/Pre-pays/Ticket Books	\$
Gain on Sale (Capital Asset)	\$
Redeemed Gift Certs./Pre-pays/Ticket Books	\$
Miscellaneous (all other income)	\$
TOTAL GROSS INCOME	\$

■ **OPERATION EXPENSES (in 2002)**

Advertising	\$
Auto Expense	\$
Bad Debts	\$
Bank Charges	\$
Over/Short	\$
Contributions/Donations	\$
Entertainment/Travel	\$
Insurance - Liability	\$
Insurance - Worker's Compensation	\$
Insurance - Health	\$
Insurance - Life	\$
Office Supplies	\$
Professional Fees	\$
Repairs - General	\$
Storage	\$
Uniforms	\$
Utilities - Water	\$
Utilities - Electricity	\$
Utilities - Gas	\$
Utilities - Telephone	\$
Miscellaneous (all other income)	\$
TOTAL OPERATION EXPENSES	\$

■ **OTHER INCOME (in 2002)**

Gain/loss on sale of capital assets	\$
Interest Earned	\$
Rental Income	\$
Miscellaneous (all other income)	\$
TOTAL OPERATION EXPENSES	\$

■ **OTHER EXPENSES (in 2002)**

Depreciation	\$
Interest Expense	\$
Lease - Building	\$
Lease Equipment	\$
R & D	\$
Taxes - Property	\$
TOTAL OPERATION EXPENSES	\$

V. Other

d) Have you ever offered any of the following...?

	Yes, at ALL of my facilities	At SOME of my facilities	NO LONGER OFFERED	NEVER USED
Annual Passes	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Coupons	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Frequency Wash Programs	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Paid-in-advance Wash Tokens.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Special Promotions (for example, holiday discounts).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Washcards/Keys/Tokenotes	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

e) What percentage of your water do you recycle?

- | | | | |
|---------------------------------------|---------------------------------------|---------------------------------------|---|
| 1 <input type="checkbox"/> 1% to 10% | 3 <input type="checkbox"/> 21% to 30% | 5 <input type="checkbox"/> 41% to 50% | 7 <input type="checkbox"/> More than 75% |
| 2 <input type="checkbox"/> 11% to 20% | 4 <input type="checkbox"/> 31% to 40% | 6 <input type="checkbox"/> 51% to 75% | 8 <input type="checkbox"/> I do not recycle water |

f) During which seasons is your business the most profitable? Rank the seasons from 1 to 4, where "1" indicates the most profitably season and "4" indicates the least profitable season.

- | | |
|--|---|
| | Spring (March, April and May) |
| | Summer (June, July and August) |
| | Fall (September, October November) |
| | Winter (December, January and February) |

Thank you for completing this questionnaire.

Early-bird Deadline: June 26, 2003 Deadline: November 7,2003

Mail, Email or fax to Smith, Bucklin & Associates, Inc., Market Research & Statistics Division
401 North Michigan Avenue, Suite 2200, Chicago, IL 60611 FAX: 312/527-6732 Email: afrijlich@sba.com



International Carwash Association
 Serving the Professional Car Care
 Industry

2002 Cost of Doing Business Self-Service Car Wash Survey

Thank you for taking the time to complete this questionnaire. Please complete as many questions as possible, to the best of your knowledge. Return your completed survey by either Email to afrijlich@sba.com, fax at 312/527-6732 or mail to Smith, Bucklin & Associates, Inc., Market Research & Statistics Division at 401 North Michigan Avenue, Suite 2200, Chicago, IL 60611 by no later than Friday, November 7. Those who complete this survey will receive a **COMPLIMENTARY COPY** of the comprehensive final report, otherwise it will be available through the International Carwash Association. In addition, survey participants will be entered into a **GRAND PRIZE DRAWING TO WIN** one of two **FREE 2004 Car Care World Expo registrations** if they submit their surveys by the **Early-bird Deadline of Thursday, June 26**. Be sure to provide your contact information below in order to receive your **COMPLIMENTARY COPY** of the final report and to be entered into the **GRAND PRIZE DRAWING**. By supplying this information, you will NOT expose your individual company data. You will however, strengthen the reliability of the results of the survey.

CONFIDENTIALITY IS GUARANTEED

The Market Research & Statistics Division of Smith, Bucklin & Associates, Inc will handle all returned surveys. Under no circumstances will any individual association member, including the Board of Directors or the Executive Director, be allowed access to individual company data. Our professional reputation depends on our adherence to these policies. As an additional safeguard, returned surveys are destroyed upon completion of the reporting cycle.

General Instructions

All questions pertaining to your business "last year" refer to calendar year 2002 OR your last fiscal year. All questions, unless otherwise specified, relate to your car wash business sales and expenses. **Answer this survey questionnaire per facility.** *Copy pages 2 and 3 of this form as needed to report on two or more facilities.* Because we are asking for total expenditures and sales figures to derive expenses **per car**, please **be sure to answer question a, Section III** ("How many self-service wash cycles did you sell in 2002?"). If you cannot give us an exact figure, please give us your best estimate (or answer within a range). Remember that this information is totally confidential and no ICA staff or board member will have access to this information.

Where should we send your **FREE COPY** of the final report? PLEASE TYPE or PRINT.

FIRST NAME	LAST NAME
COMPANY NAME	
STREET ADDRESS	
CITY	STATE ZIP/POSTAL CODE
COUNTRY (if other than U.S.)	PROVINCE (if Canada)
PHONE	Are you an ICA member? Yes <input type="checkbox"/> No <input type="checkbox"/>

I. Business Profile

- a) What is your primary business?
- 1 Car washing
2 Detailing
3 Oil changes
4 Self-Service Car Wash
5 In-Bay Automatic Car Wash
6 Other (specify): _____
- b) How many facilities of each type do you own/operate?
(Write in the number of each.)
- | | |
|----------------------|--------------------------------|
| <input type="text"/> | Car washing |
| <input type="text"/> | Detailing |
| <input type="text"/> | Oil changes |
| <input type="text"/> | Self-service car wash bays |
| <input type="text"/> | In-bay automatic car wash bays |
| <input type="text"/> | Other (specify): _____ |
- c) In which state is your business located?
- 1 Northeast (CT, DC, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VA, VT, WV)
2 Southeast (AL, AR, FL, GA, KY, LA, MS, NC, SC, TN)
3 Southwest (AZ, CA, CO, HI, NM, NV, OK, TX, UT)
4 Northwest (AK, ID, MT, OR, WA, WY)
5 Midwest (IA, IL, IN, KS, MI, MN, MO, ND, NE, OH, SD, WI)
- d) In what type of area is your business located?
- 1 Urban area (population more than 1/2 million)
2 Suburban area or small city (population to 1/2 million)
3 Rural area (population less than 50,000)
- e) In what year was your facility built? _____

II. Car Volume & Price

Please answer the questions in this section for your car washing business ONLY.

- a) How many self-service wash cycles did you sell in 2002? # _____

If you cannot give us an exact figure, please estimate by answering within a range.

- | | |
|---|--|
| 1 <input type="checkbox"/> Less than 25,000 | 5 <input type="checkbox"/> 85,000 - 99,999 |
| 2 <input type="checkbox"/> 25,000 - 49,999 | 6 <input type="checkbox"/> 100,000 - 124,999 |
| 3 <input type="checkbox"/> 50,000 - 74,999 | 7 <input type="checkbox"/> 125,000 - 149,999 |
| 4 <input type="checkbox"/> 75,000 - 84,999 | 8 <input type="checkbox"/> 150,000 or more |
- b) How many wash cycles are typically used per customer, per car?
- 1 One
2 Two
3 Three
4 Four or more
- c) What was the base price for a self-service wash cycle at your facility last year? \$ _____
- d) What percentage of the traffic that passes by your business do you capture (i.e., capture rate)? _____%

III Services & Profit Centers

- a) Which of the following do you sell at your business? (Check all that apply.)

- | | |
|--|---|
| 1 <input type="checkbox"/> Air | 5 <input type="checkbox"/> Vacuuming |
| 2 <input type="checkbox"/> Carpet/Fragrance Machines | 6 <input type="checkbox"/> Vending |
| 3 <input type="checkbox"/> Soda/snack vending machines | 7 <input type="checkbox"/> Washcards/keys/tokenotes |
| 4 <input type="checkbox"/> Triple Foam | 8 <input type="checkbox"/> Other (specify): _____ |

If you sell vacuums, how many are at this facility? # _____

III Services & Profit Centers - continued

b) Do you offer any of the following profit centers at the same location as this facility? (Check all that apply.)

Additional Services	Currently Offer	Plan to Offer in 1-2 Years	Do Not Plan to Offer
ATM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience Store	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Express Detailing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gas Station	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oil Change/Quick Lube	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you selected "Other" above, please specify: _____

IV. Income & Expenses

Please note, the International Carwash Association will be reporting only the TOTAL figures in the final report. The itemized categories are provided to assist you with deriving the TOTAL figures. If you cannot provide an exact figure for the following, please give a "best" estimate:

■ LABOR/LABOR EXPENSES

Include ALL employees (office management, production labor, cashiers, maintenance personnel, etc.) used to produce car wash sales reported in Car Volume & Price. When reporting total annual expenditure, please include expenses for all fully burdened employees.

a) How many full-time and part-time positions did you employ on average last year?

Full-time #: _____ Part-time #: _____

b) What is the average number of hours worked weekly by employees at this facility?

Number of Full-time Hours per Week # _____

Number of Part-time Hours per Week # _____

c) Do you offer any of the following benefits for full-time and/or part-time employees? (Check all that apply)

Benefits	Full-time Employees	Part-time Employees
Medical Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Dental Plan	<input type="checkbox"/>	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

■ COST OF GOODS SOLD (in 2002)

Electricity	\$
Gas	\$
Labor (salaries & wages)	\$
Payroll Management	\$
Pit Cleaning	\$
Refunds	\$
Vending Items	\$
Wash Supplies	\$
Water & Sewer	\$
TOTAL COST OF GOODS	\$

■ GROSS INCOME (in 2002)

Wash	\$
Vacuums	\$
Vending sales	\$
Miscellaneous (all other income)	\$
TOTAL GROSS INCOME	\$

IV. Income & Expenses - continued

Please note, the International Carwash Association will be reporting only the TOTAL figures in the final report. The itemized categories are provided to assist you with deriving the TOTAL figures. If you cannot provide an exact figure for the following, please give a "best" estimate:

■ **OPERATION EXPENSES (in 2002)**

Advertising	\$
Insurance	\$
Office Supplies	\$
Professional Fees	\$
Property Taxes	\$
Repairs - General	\$
Waste Haul	\$
Interest	\$
Depreciation	\$
TOTAL OPERATION EXPENSES	\$

V. Other

a) Do you accept any of the following at your business...?

	Yes, at ALL of my facilities	At SOME of my facilities	NO LONGER OFFERED	NEVER USED
Credit Cards.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Dollar Coins	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Paid-in-advance Wash Tokens.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Washcards/Keys/Tokenotes.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

If using "Dollar Coins" at all or some of your facilities, do you accept Golden Dollars or Susan B. Anthony Coins? (Check all that apply)

- 1 Golden Dollars
- 2 Susan B. Anthony Dollar Coins

b) What percentage of your water do you recycle?

- 1 1% to 10%
- 2 11% to 20%
- 3 21% to 30%
- 4 31% to 40%
- 5 41% to 50%
- 6 51% to 75%
- 7 More than 75%
- 8 I do not recycle water

c) During which seasons is your business the most profitable? Rank the seasons from 1 to 4, where "1" indicates the most profitably season and "4" indicates the least profitable season.

- Spring (March, April and May)
- Summer (June, July and August)
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Thank you for completing this questionnaire.

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