

AutoLaundry^{news}

Results From The Auto Laundry News

2022 Exterior Conveyor Survey

The 2022 Auto Laundry News Exterior Conveyor Survey was conducted through a mailing of questionnaires to a random selection of our subscribers who own and operate exterior conveyor car wash businesses. The information presented in this report results from an analysis of data provided by respondents from locations throughout the United States.

Exterior-Only vs. Express-Exterior Sites

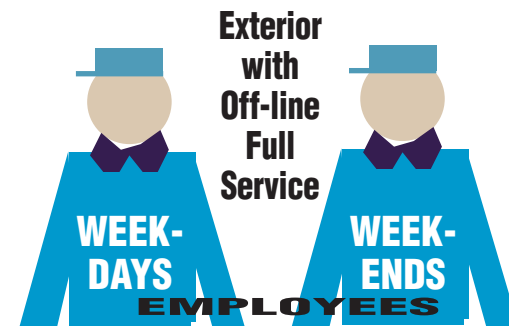
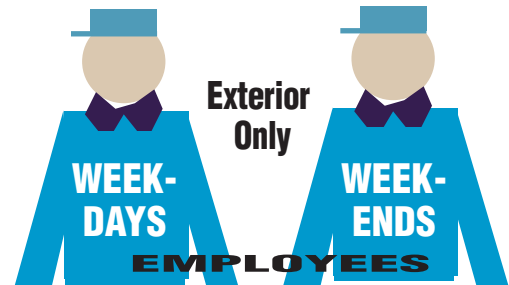
For comparative purposes, respondents are, on occasion, separated into two main categories: exterior-only operations and express-exterior sites. A third category, exterior washes with off-line full service, is employed when relevant. Exterior-only participants make up 48 percent of the total response, express-exterior sites, likewise, account for 48 percent, and exteriors with off-line full service round out the total with 4 percent. Last year the split was 34/59/7.

All respondents self-identify as belonging to one category or another. As in the past, exterior-only locations have in some instances adopted services — such as free self-vacuuming and auto pay stations — once unique to the express format.

In the express-exterior category, 82 percent of respondents report operating an unlimited monthly wash club with an average age of 3.3 years and membership averaging 2,086. While only 20 percent of exterior-only sites in last year's survey offered wash club memberships, this year that percentage has grown to 73 percent. Their subscriber numbers have also inched up to an average 778 compared to 511 last year.

Revenues

Overall, 76 percent of respondents report income growth over the previous year, a marked step up from 38 percent last year and a turnaround from three consecutive years of shrinking numbers. The graphic on page 35 provides a six-year perspective. This reversal is attributed largely to performance at exterior-only sites: Last year, only 22 percent reported income growth averaging 9 percent. This year, 75 percent report an average 22.4 percent increase in revenue. Perhaps more dramatic is the percentage of exterior-only sites that report declining income. This year: zero. Last year: 44 percent. By comparison, 13 percent of express-exterior locations report reversals, though still an improvement over the 20 percent who did so in the previous survey. 📊



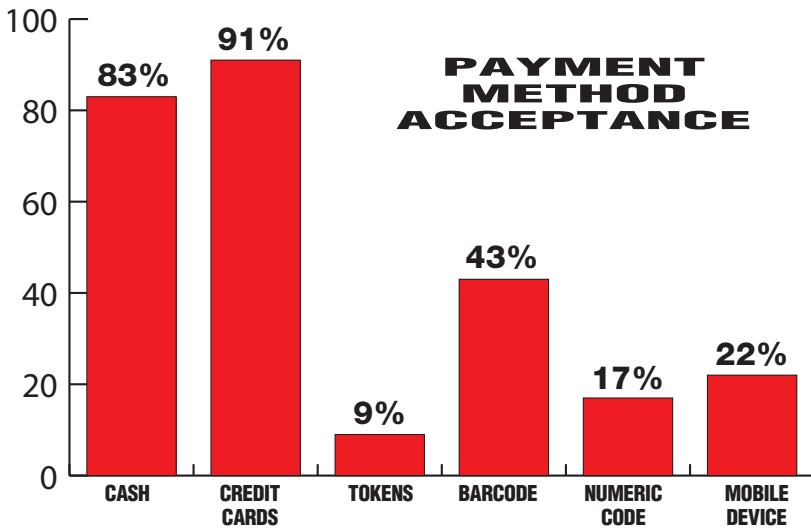
* Too Few Responses

COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	9%
1	13%
2	17%
3	30%
4	17%
5	9%
MORE THAN 5	4%

SURVEY

PERCENTAGE OF BUSINESS DONE BY DAY OF THE WEEK



	EXTERIOR ONLY	EXPRESS EXTERIOR
MONDAY	16	12
TUESDAY	11	12
WEDNESDAY	10	10
THURSDAY	11	10
FRIDAY	19	17
SATURDAY	20	24
SUNDAY	13	15

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	25	26	38	11
Mountain	29	22	25	24
Midwest	26	28	25	21
Central	45	17	25	13
South Central	20	29	23	28
Southeast	24	27	24	25
Mid-Atlantic	26	27	22	24
New England	31	31	16	21

OPEN SUNDAY

Exterior Only: 91%
Express Exterior: 100%

OPEN 24 HOURS

Exterior Only: 36%*
Express Exterior: 0%

* Wand self-serve bays only

AVERAGE DAILY TRAFFIC COUNT

AVERAGE ANNUAL WASH VOLUME

AVERAGE GROSS REVENUE PER CAR

Exterior Only

36,500

39,000

\$11.16

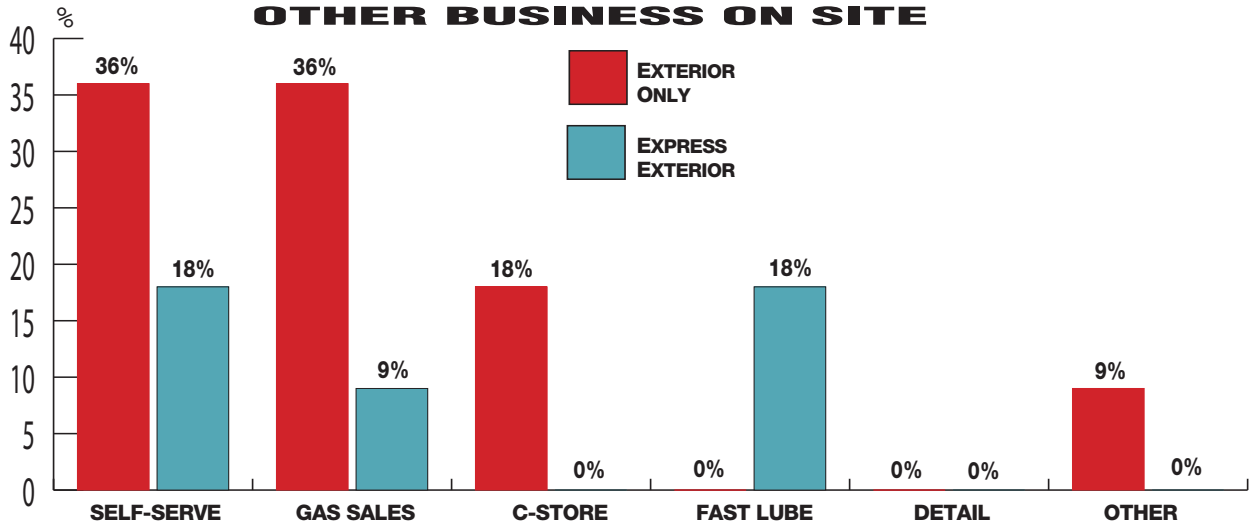
Express Exterior

36,300

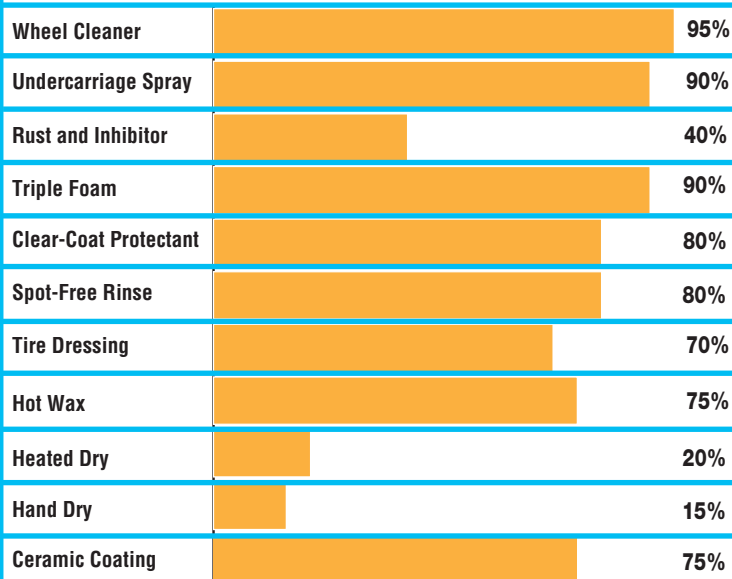
158,500

\$11.16

OTHER BUSINESS ON SITE



SERVICES OFFERED ON THE CONVEYOR



VACUUMS

Exterior Only

Express Exterior

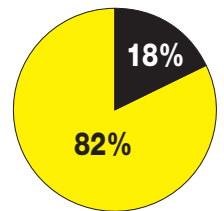
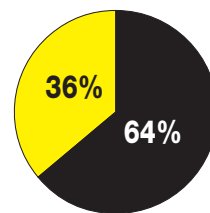
NUMBER OF STALLS

14

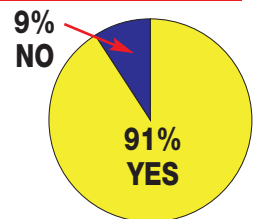
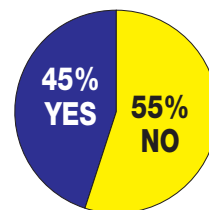
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TYPE

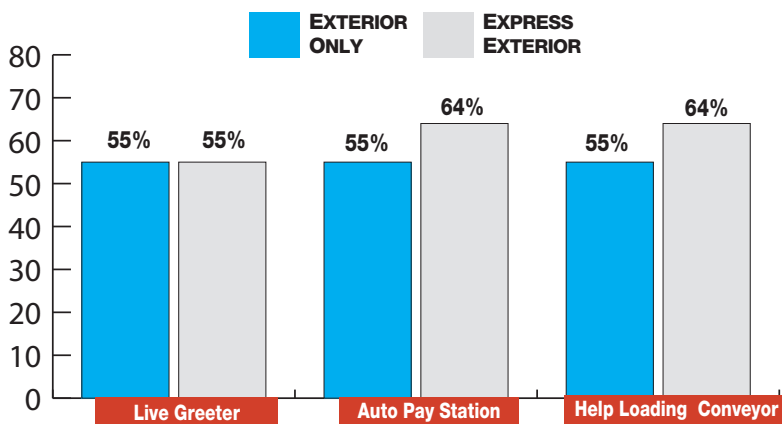
INDIVIDUAL
CENTRAL



FREE



TUNNEL ENTRY



PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

FRICTION WASH		77%
TOUCHLESS WASH		18%
HYBRID WASH		5%
FLAT BELT CONVEYOR		18%
OVER AND UNDER CONVEYOR		82%
SURFACE CONVEYOR		0%
WASHING CURTAINS		0%
STATIONARY MITTER CURTAINS		0%
MOTORIZED MITTER CURTAINS		55%
PREP GUNS		73%
COMPUTERIZED CONVEYOR SERVICE		55%
HIGH-PRESSURE FLOOD ARCH		45%
WAX ARCH		100%
FOAM APPLICATOR		82%
TOP BRUSH		45%
TIRE BRUSH		36%
ROCKER BRUSH		91%
WRAPAROUNDS		91%
WINDOW SIDE BRUSH		55%
REVERSE OSMOSIS SYSTEM		55%
AIR DRYERS		100%
DRYING CURTAINS		0%
WATER RECLAIM SYSTEM		64%
TIRE DRESSING APPLICATOR		55%
WATER REPELLENT ARCH		73%
BUBBLER ARCH		0%
"Lava" APPLICATION		55%
FRICTION DRYING SYSTEM		9%
LED LIGHTING		82%
DIGITAL MENU/SIGNAGE		45%
PAINT SEALANT		18%
CERAMIC COATING		82%

AVERAGE TUNNEL LENGTH

EXTERIOR ONLY	EXPRESS EXTERIOR
102 FEET	108 FEET

OPERATE COIN-OP BAYS ON SITE

EXTERIOR ONLY	EXPRESS EXTERIOR
36%	18%

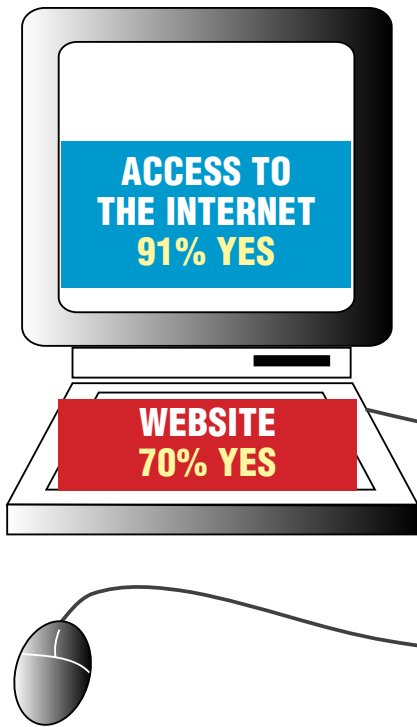
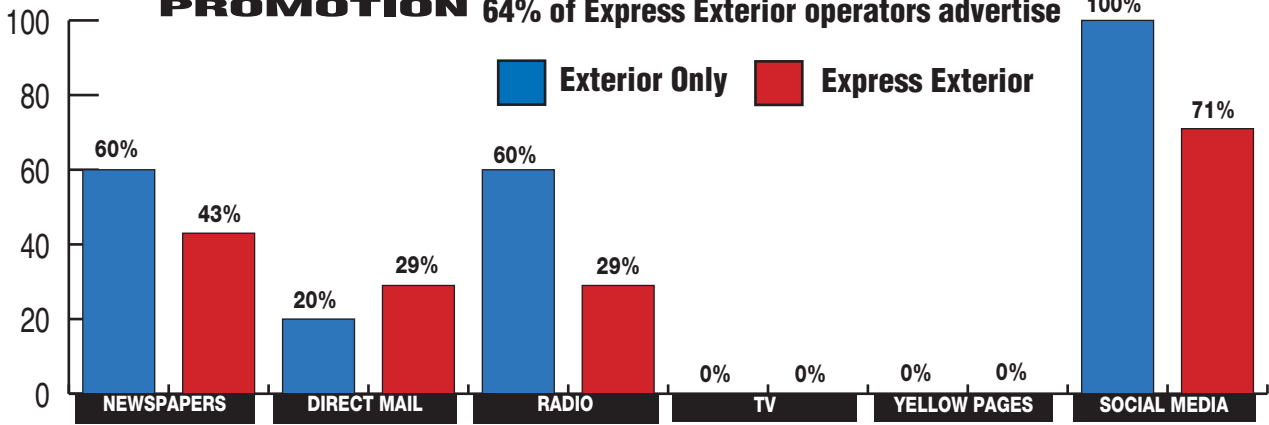
AVERAGE NUMBER OF BAYS

3.8	8.0
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NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR

AVERAGE PURCHASE PRICE OF THE NEW PROPERTY (LAND ONLY)	\$925,000
AVERAGE MONTHLY RENT	<i>(too few responses)</i>
AVERAGE COST OF IMPROVEMENTS (BLDG., LANDSCAPING ETC.)	\$4,430,000
AVERAGE COST OF EQUIPMENT	\$1,250,000

ADVERTISING & PROMOTION 45% of Exterior Only operators advertise
64% of Express Exterior operators advertise



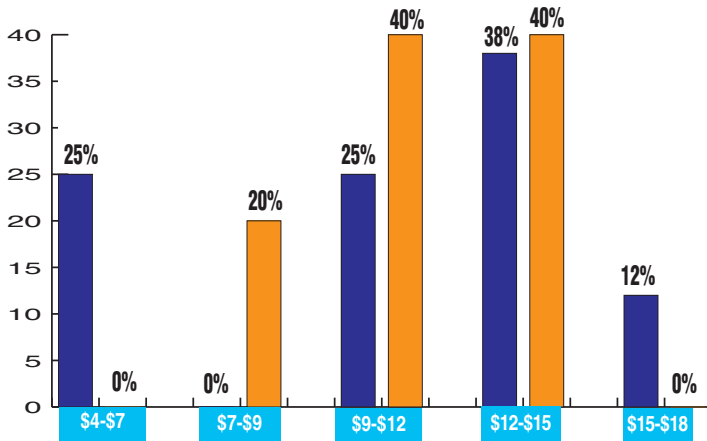
OPERATING COSTS

OPERATING COSTS
(AS A PERCENTAGE OF TOTAL REVENUES)

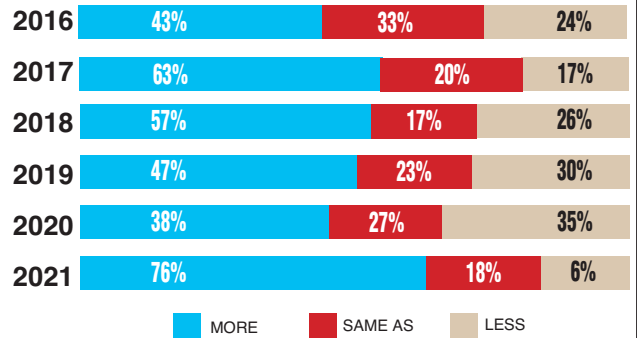
RENT		18%
EQUIPMENT & BLDG. MAINTENANCE		2.8%
CHEMICALS		72%
LABOR	Exterior Only 18.2% Express Exterior 19.4%	
UTILITIES		9.4%
INSURANCE		4.0%
ADVERTISING & PROMOTION		1.2%
EQUIPMENT ON LEASE		0%
CUSTOMER CLAIMS		0.5%

GROSS REVENUE PER CAR

Exterior Only
Express Exterior

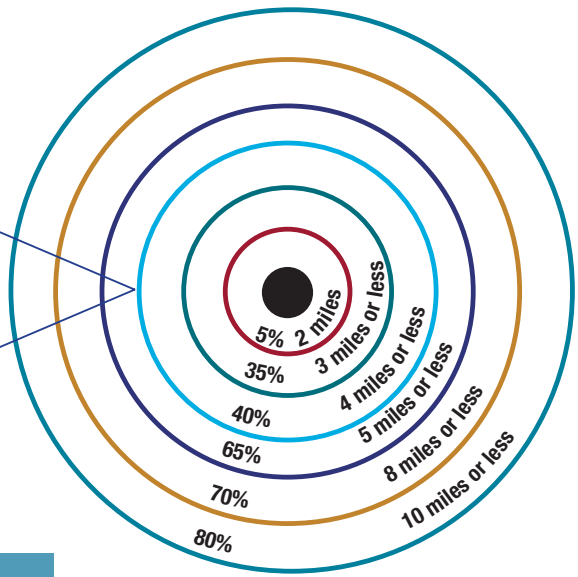


INCOME: CURRENT YEAR VS. PREVIOUS YEAR



SURVEY

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



LABOR COSTS

