AutoLaundry news
THE VOICE OF THE CAR CARE INDUSTRY

Results from the Auto Laundry News

2023 Exterior Conveyor Survey

www.carwashmag.com

Results From The Auto Laundry News

2023 Exterior Conveyor Survey

The 2023 *Auto Laundry News* Exterior Conveyor Survey was conducting 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 38 percent of the total response, express-exterior sites account for 52 percent, and exteriors with off-line full service round out the total with 10 percent. Last year the split was 48/48/4.

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.

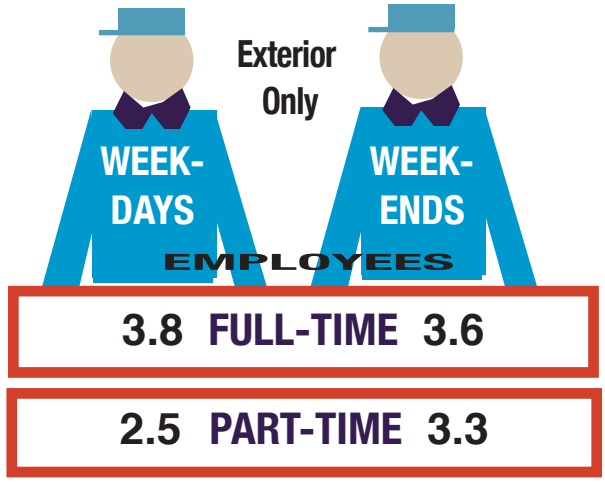
In the express-exterior category, 82 percent of respondents (same as last year) report operating an unlimited monthly wash club with an average age of 5.4 years and membership averaging 4,048. Exterior-only sites are less consistent in this regard. Two years ago, only 20 percent of exterior-only sites offered wash club memberships; last year that percentage grew to 73 percent. In the current survey, 38 percent report offering wash club memberships.

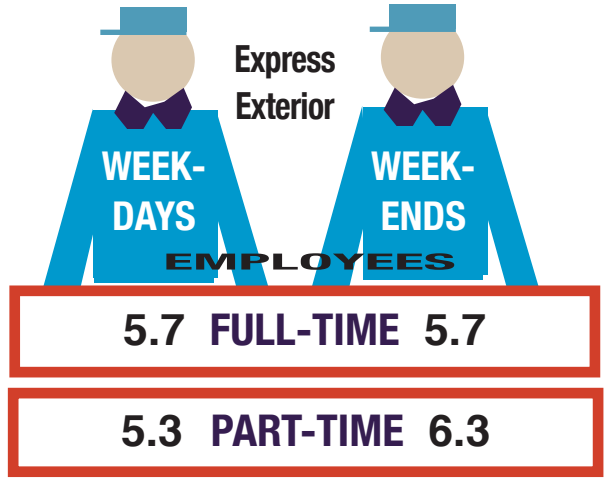
Revenues

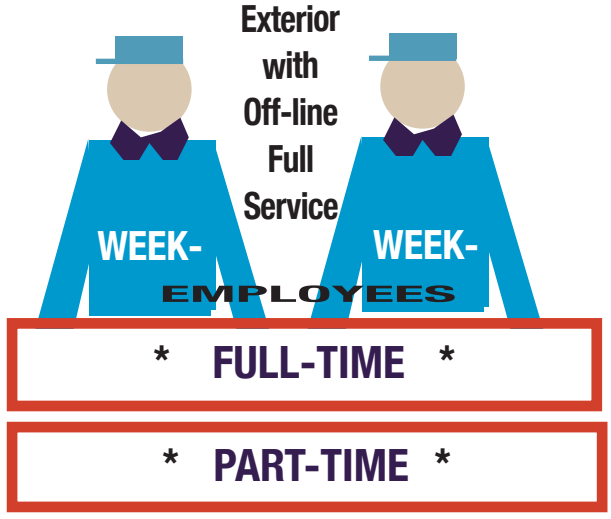
Overall, 47 percent of respondents report income growth over the previous year, a reversal from the 76 percent reported last year. The graphic on page 35 provides a six-year perspective. With 50 percent reporting income growth, exterior-only sites outperformed the 45 percent of express-exterior locations who reported the same.

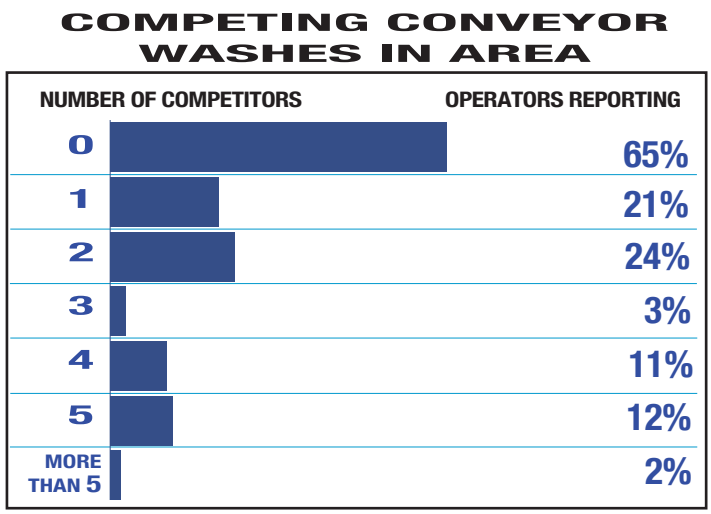
Inflation

Like every other business, car washes are impacted by inflation. Exterior-only sites and express-exterior locations responded very similarly. Fully half of the former and 55 percent of the latter report increasing their prices — an average of 12.3 percent and 10.3 percent respectively — in 2022 because of inflation.



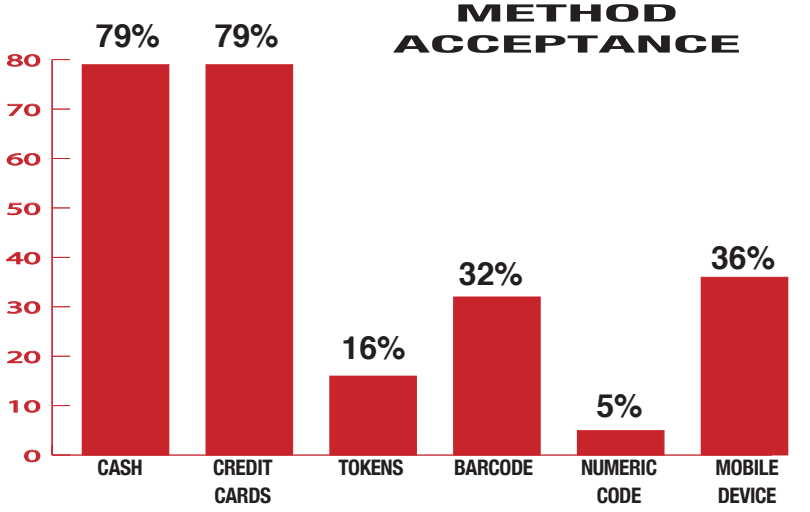






SURVEY

PAYMENT METHOD ACCEPTANCE



PERCENTAGE OF BUSINESS DONE BY DAY OF THE WEEK

	EXTERIOR ONLY	EXPRESS EXTERIOR
MONDAY	10	13
TUESDAY	9	10
WEDNESDAY	11	11
THURSDAY	10	12
FRIDAY	20	19
SATURDAY	20	20
SUNDAY	19	15

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	*	*	*	*
Mountain	25	26	27	23
Midwest	27	28	25	20
Central	43	20	18	18
South Central	15	33	22	31
Southeast	22	30	26	22
Mid-Atlantic	41	32	13	13
New England	33	35	15	18

** Too Few Responses*

OPEN SUNDAY

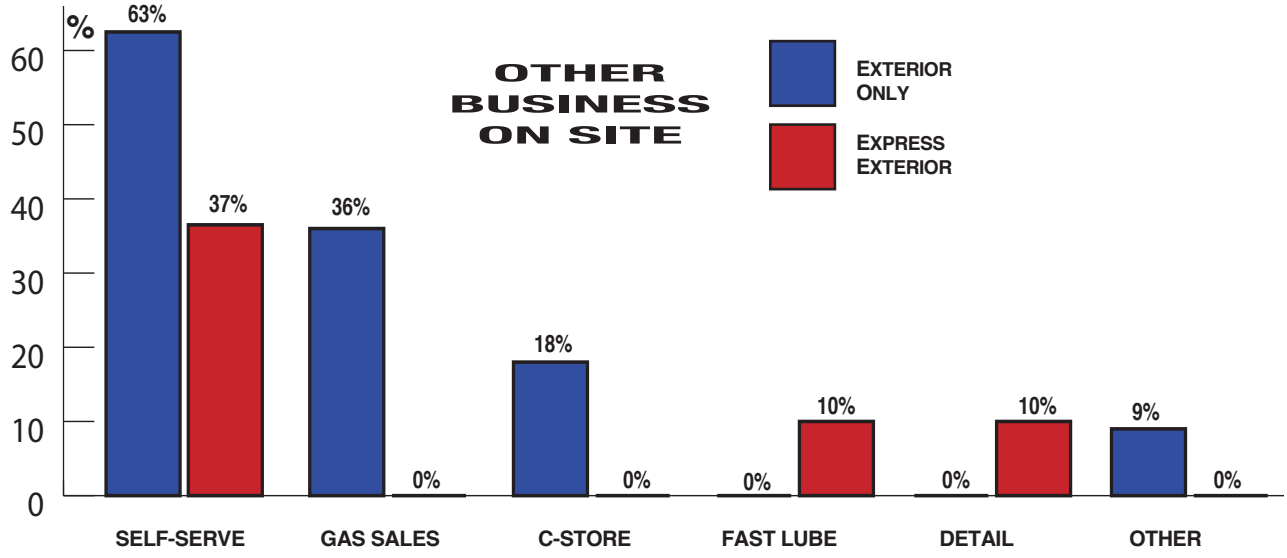
Exterior Only	Express Exterior
100%	64%

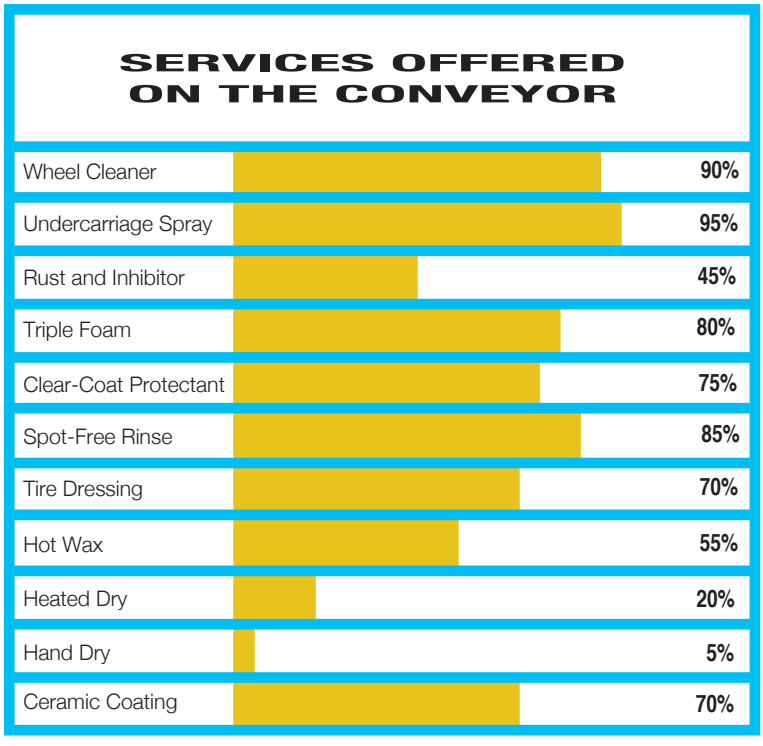
OPEN 24 HOURS

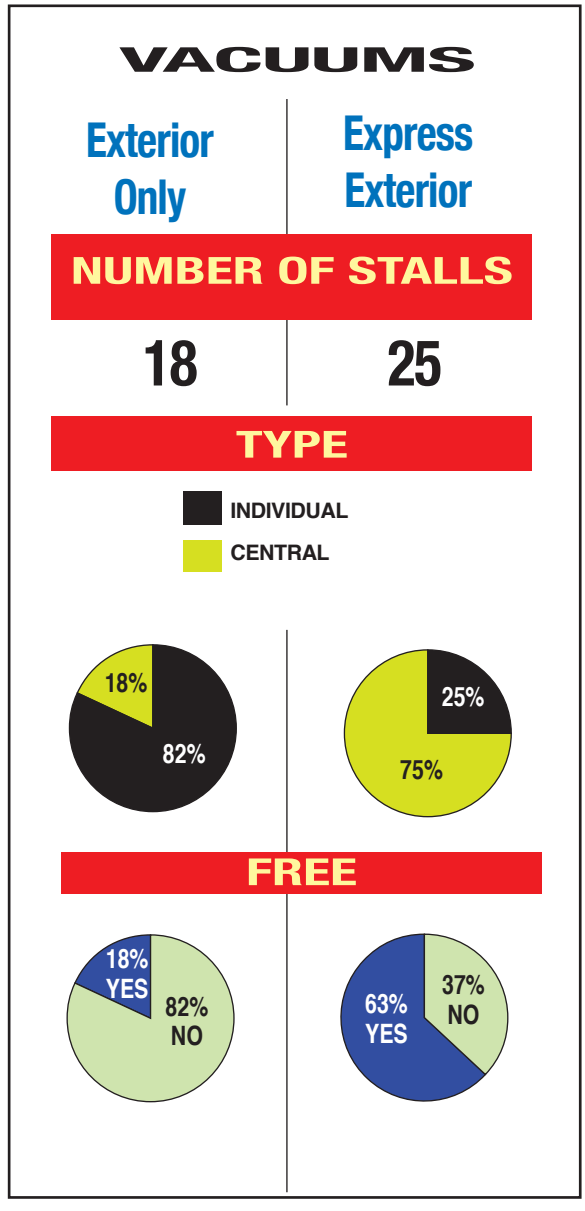
Exterior Only	Express Exterior
13%*	9%

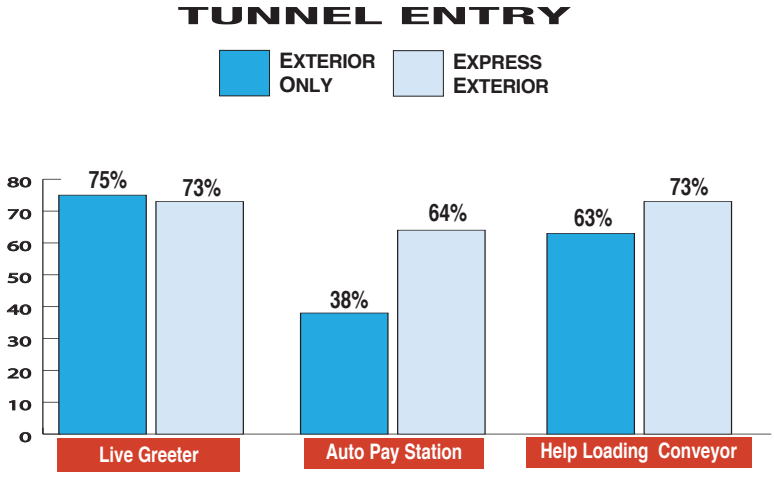
** Wand self-serve bays only*

	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME	AVERAGE GROSS REVENUE PER CAR
Exterior Only	25,100	20,100	$12.06
Express Exterior	38,700	65,000	$11.75


OTHER BUSINESS ON SITE
%
60
50
40
30
20
10
0
EXTERIOR ONLY
EXPRESS EXTERIOR
63%
37%
36%
0%
18%
0%
0%
10%
0%
10%
9%
0%
SELF-SERVE
GAS SALES
C-STORE
FAST LUBE
DETAIL
OTHER


SERVICES OFFERED ON THE CONVEYOR
Wheel Cleaner 90%
Undercarriage Spray 95%
Rust and Inhibitor 45%
Triple Foam 80%
Clear-Coat Protectant 75%
Spot-Free Rinse 85%
Tire Dressing 70%
Hot Wax 55%
Heated Dry 20%
Hand Dry 5%
Ceramic Coating 70%


VACUUMS
Exterior Only
Express Exterior
NUMBER OF STALLS
18
25
TYPE
INDIVIDUAL
CENTRAL
18%
82%
25%
75%
FREE
18% YES
82% NO
63% YES
37% NO


TUNNEL ENTRY
EXTERIOR ONLY
EXPRESS EXTERIOR
80
70
60
50
40
30
20
10
0
75%
73%
38%
64%
63%
73%
Live Greeter
Auto Pay Station
Help Loading Conveyor

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

Friction Wash	75%
Touchless Wash	10%
Hybrid Wash	15%
Flat Belt Conveyor	14%
Over and Under Conveyor	86%
Surface Conveyor	0%
Washing Curtains	7%
Stationary Mitter Curtains	7%
Motorized mitter curtains	64%
Prep Guns	79%
Computerized Conveyor Service	79%
High-Pressure Flood Arch	50%
Wax Arch	86%
Foam Applicator	100%
Top Brush	57%
Tire Brush	57%
Rocker Brush	79%
Wraparounds	86%
Window Side Brush	43%
Reverse Osmosis System	57%
Air Dryers	100%
Drying Curtains	7%
Water Reclaim System	57%
Tire Dressing Applicator	57%
Water Repellent Arch	86%
Bubbler Arch	21%
"Lava" Application	50%
Friction Drying System	7%
LED Lighting	98%
Digital Menu/Signage	29%
Paint Sealant	21%
Ceramic Coating	64%

AVERAGE TUNNEL LENGTH

EXTERIOR ONLY	EXPRESS EXTERIOR
101 FEET	108 FEET

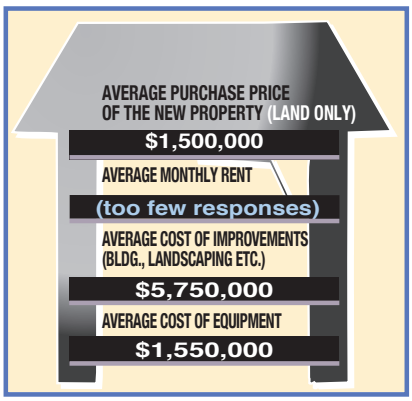
OPERATE COIN-OP BAYS ON SITE

EXTERIOR ONLY	EXPRESS EXTERIOR
62%	36%

AVERAGE NUMBER OF BAYS

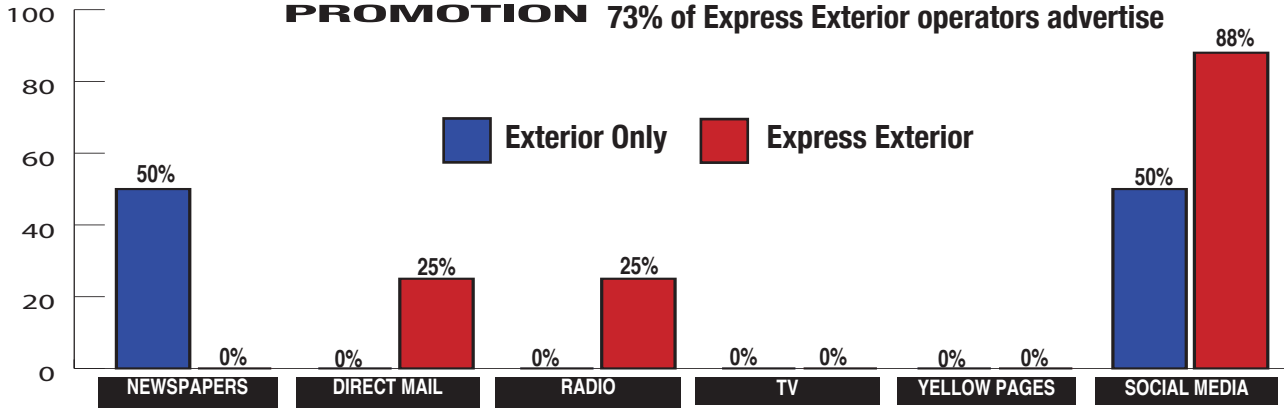
6.5	5.8

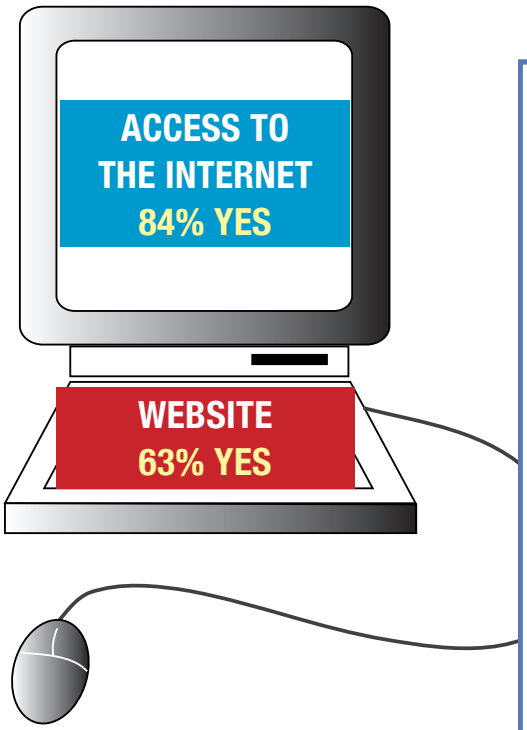
NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR



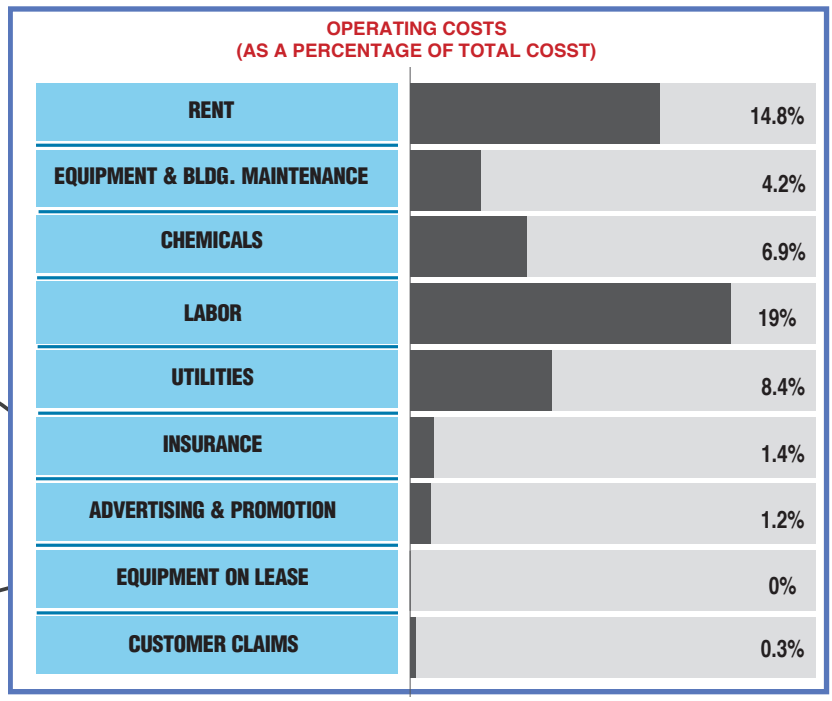
ADVERTISING & PROMOTION

25% of Exterior Only operators advertise
73% of Express Exterior operators advertise

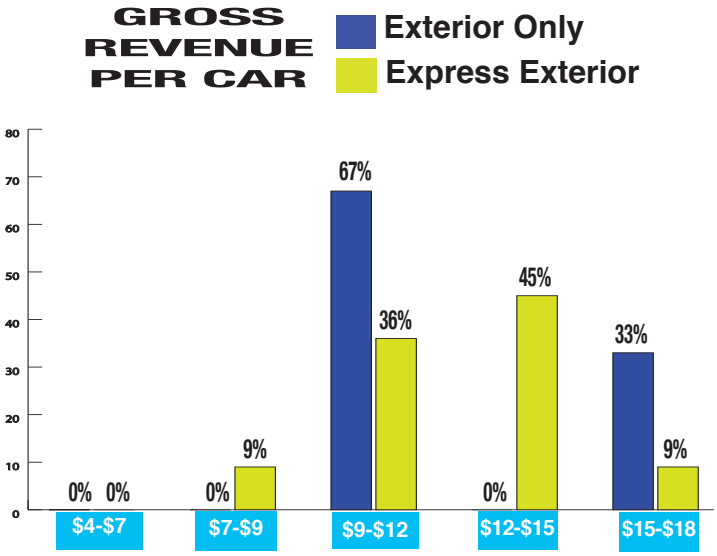




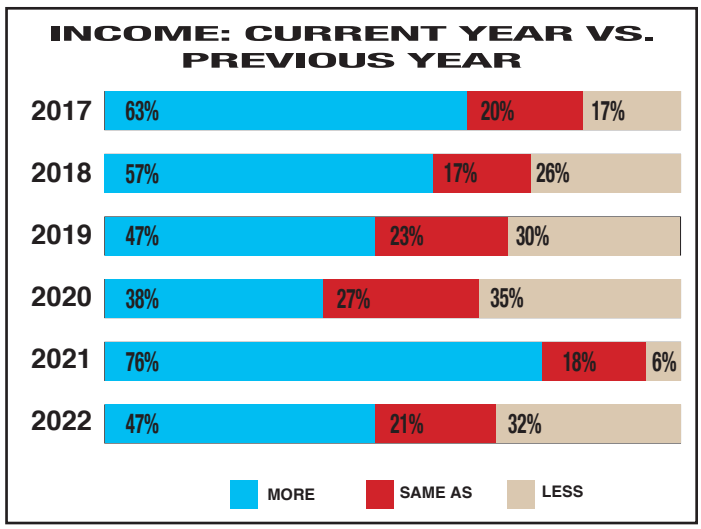
OPERATING COSTS



GROSS REVENUE PER CAR

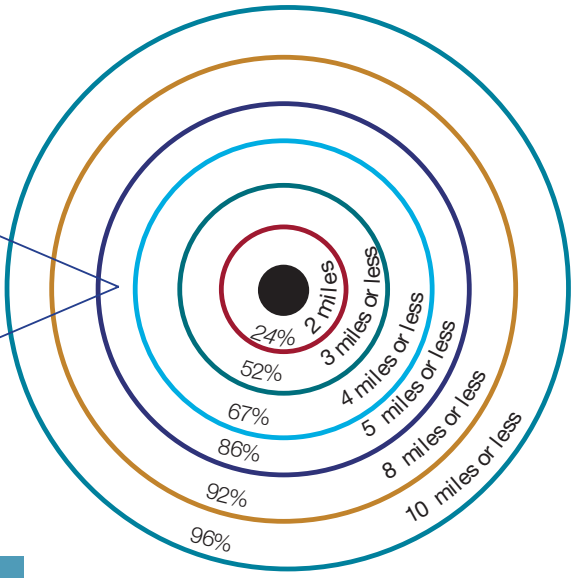
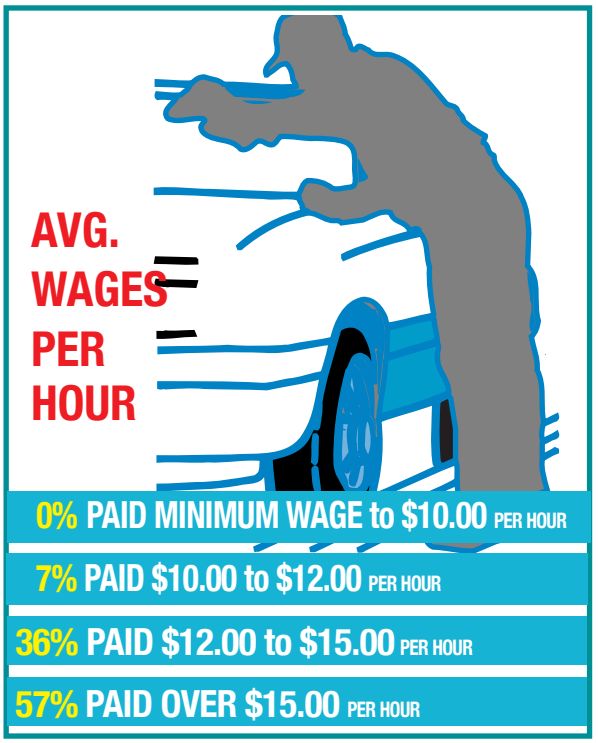
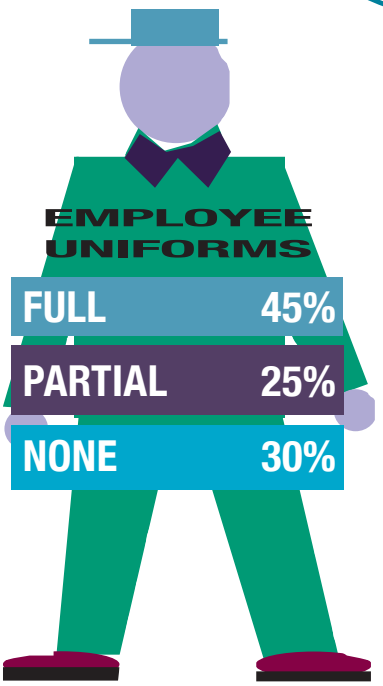
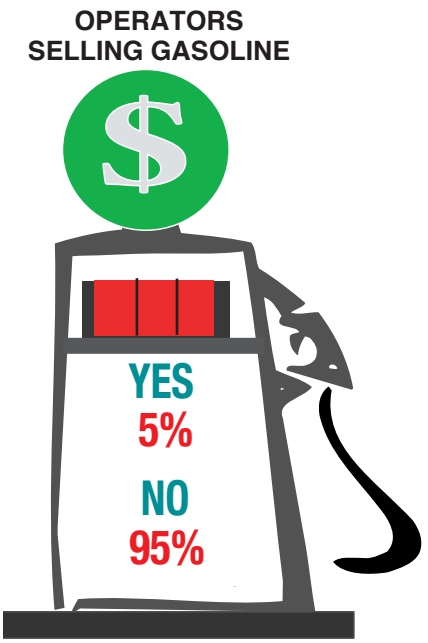
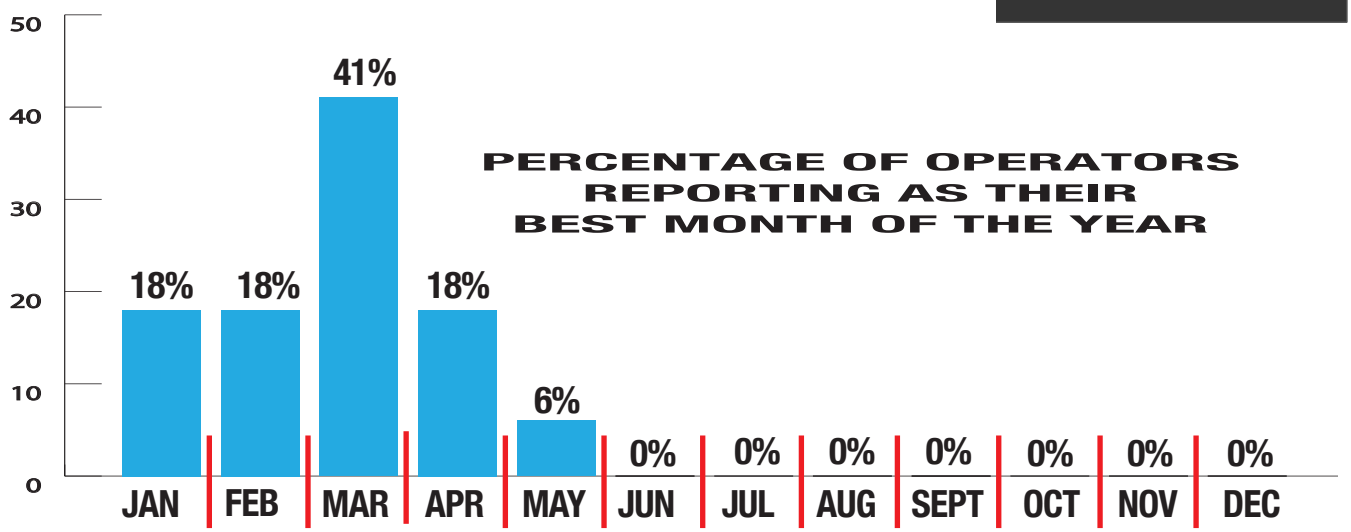


INCOME: CURRENT YEAR VS. PREVIOUS YEAR



SURVEY

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



LABOR COSTS