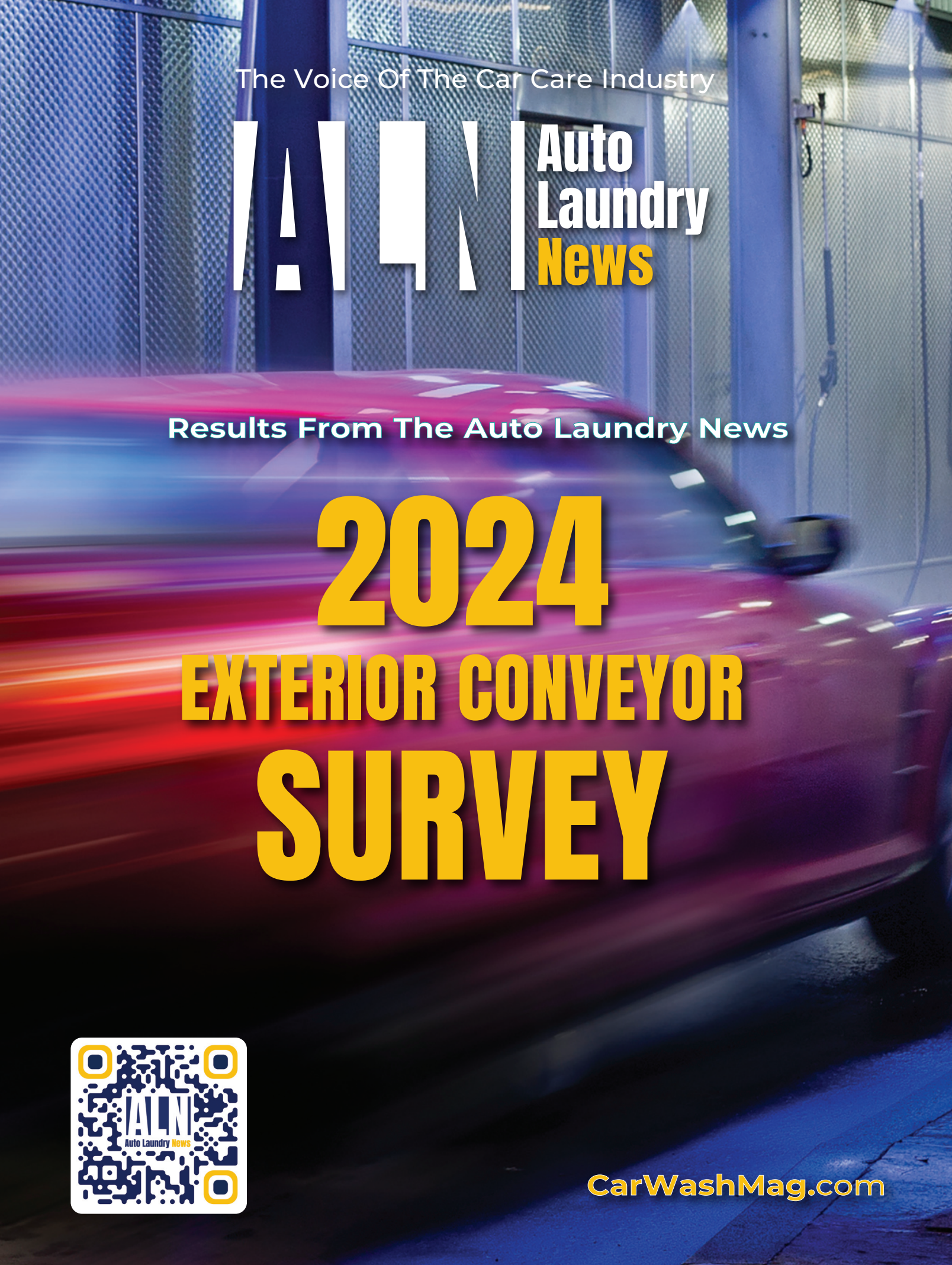
The Voice Of The Car Care Industry
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Results From The Auto Laundry News

2024 EXTERIOR CONVEYOR SURVEY

The 2024 *Auto Laundry News* Exterior Conveyor Survey was conducted through a traditional and electronic mailing of questionnaires to a random selection of subscribers who own and operate exterior conveyor car wash businesses.

This report presents information based on an analysis of data provided by respondents from across the United States.

Exterior-Only vs. Express-Exterior Sites

On occasion, respondents are divided into two main categories for comparative purposes: exterior-only operations and express-exterior sites. Exterior-only participants comprise 10 percent of the total response, while express exterior sites account for 90 percent.

Last year, exterior-only accounted for 38 percent of survey respondents. The significant drop in exterior-only respondents reflects the proliferation of express in the industry, as both new investors and industry veterans build and retool sites to offer the express concept.

State of the Segment

Operators were asked to provide one word that best describes the exterior segment. From a glass-half-full perspective, a little more than half of the comments were positive in nature — robust, steady, exciting, etc.

But from a half-glass-empty point of view, the segment's operators are not pleased with the current state of affairs. Around half of the operators provided a negative take on the segment's state, with the most popular negative response being 'over-saturation.' The massive influx of new operators into the space has certainly produced some blowback.

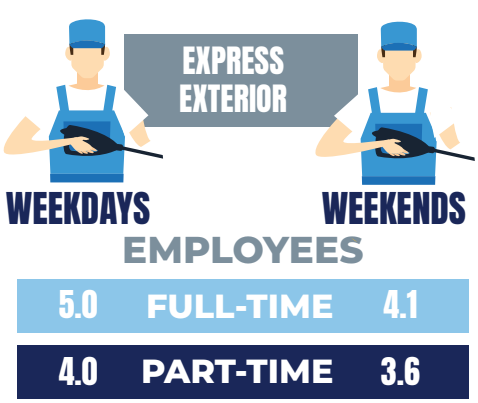
Financial Performance

Overall, 47 percent of respondents reported income growth over the previous year, which is exactly the percentage that reported growth last year. Interestingly, 32 percent of operators experienced a revenue drop last year, while just 21 percent reported a reduction in top-line performance this year. The graphic on page 35 provides a six-year perspective.

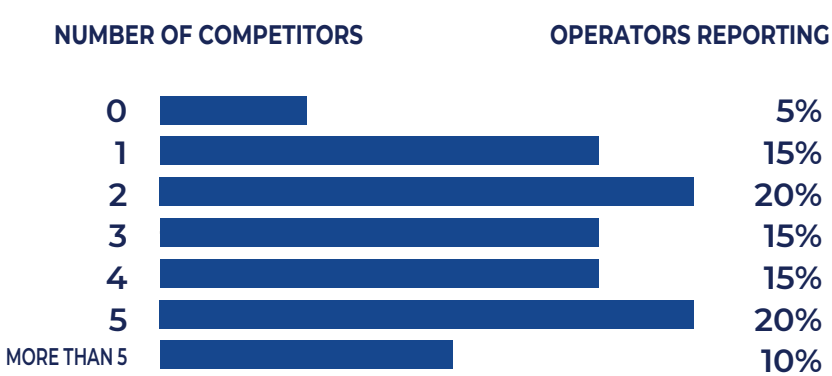
Inflation continues to fuel revenue growth as operators must increase prices to keep pace with the rising cost of equipment, debt, labor, and materials. We asked operators to provide the percentage of revenue allocated to operating costs like mortgages, equipment, chemicals, labor, utilities, etc. In every category, operators report an increase in the percentage of income allocated to overhead. The graphic on page 35 provides an in-depth look.

To help offset some of these rising costs, operators have been forced to increase prices. Last year, around 50 percent of operators reported increasing prices due to inflation. That number has risen to 60 percent this year, with operators raising prices by 11.4 percent on average.

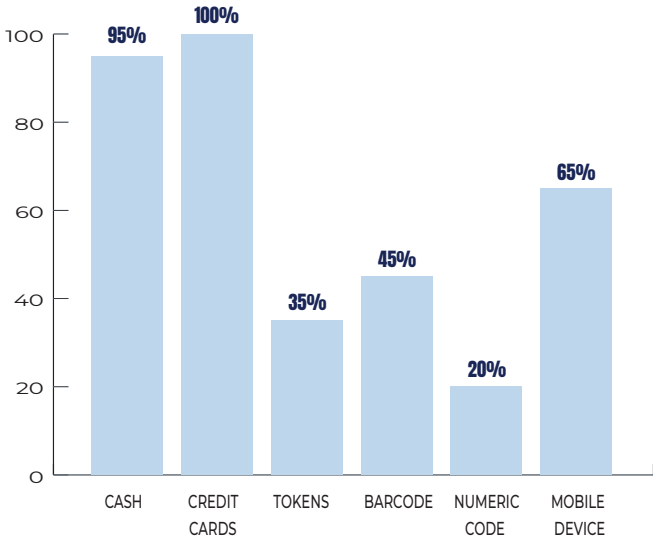
In addition to raising prices, operators have grown their top and bottom lines by relying on recurring revenue. Eighty-four percent of those surveyed report offering some form of unlimited wash club. The average reported age of a wash club was five years.



COMPETING CONVEYOR WASHES IN AREA



PAYMENT METHOD ACCEPTANCE



PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK

	EXTERIOR ONLY	EXPRESS EXTERIOR
MONDAY	13%	10%
TUESDAY	13%	12%
WEDNESDAY	14%	11%
THURSDAY	12%	12%
FRIDAY	17%	19%
SATURDAY	17%	22%
SUNDAY	14%	14%

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	16	36	33	21
Mountain	27	23	33	17
Midwest	30	25	25	20
Central	22	31	26	21
Southeast	41	23	18	18
Mid-Atlantic	35	27	22	16
New England	42	25	15	18

NOTE: Some results do not total 100 due to rounding

OPEN SUNDAY

EXTERIOR ONLY	EXPRESS EXTERIOR
100%	87%

OPEN 24 HOURS

EXTERIOR ONLY	EXPRESS EXTERIOR
33%	13%

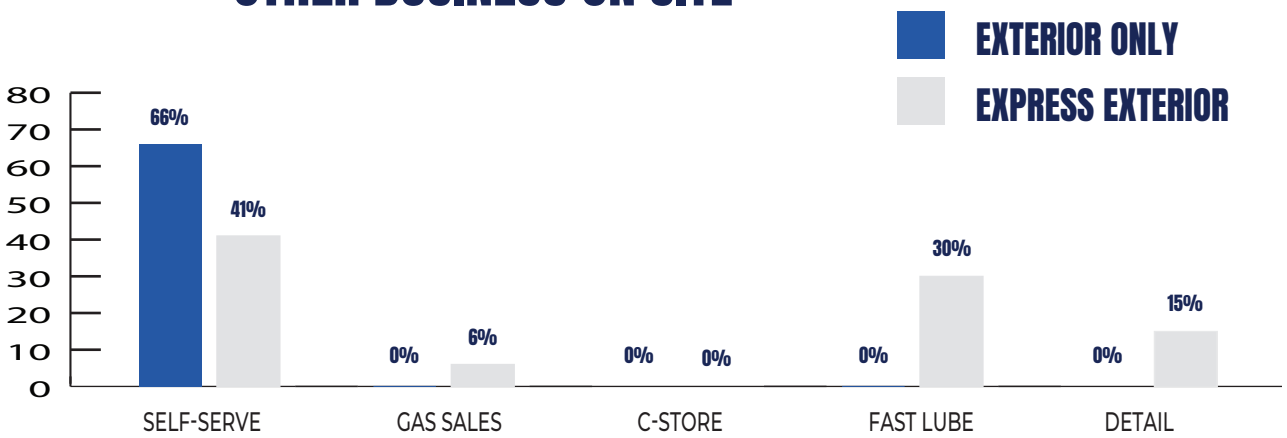
Wand self-serve bays only

AVERAGE DAILY TRAFFIC COUNT
31,930

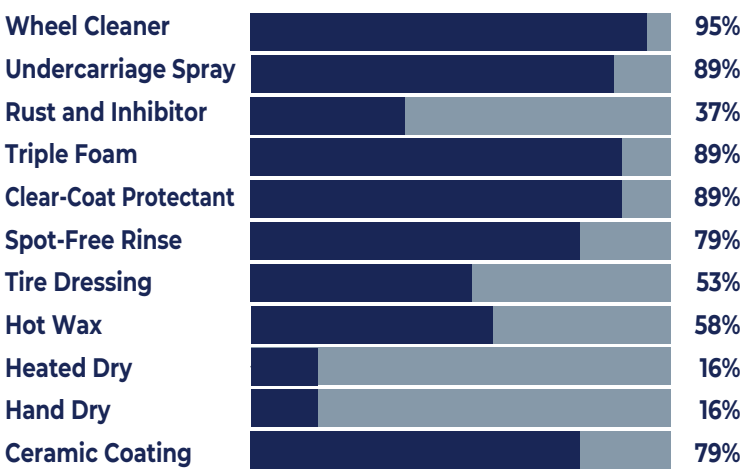
AVERAGE ANNUAL WASH VOLUME
92,400

AVERAGE GROSS REVENUE PER CAR
$14.05

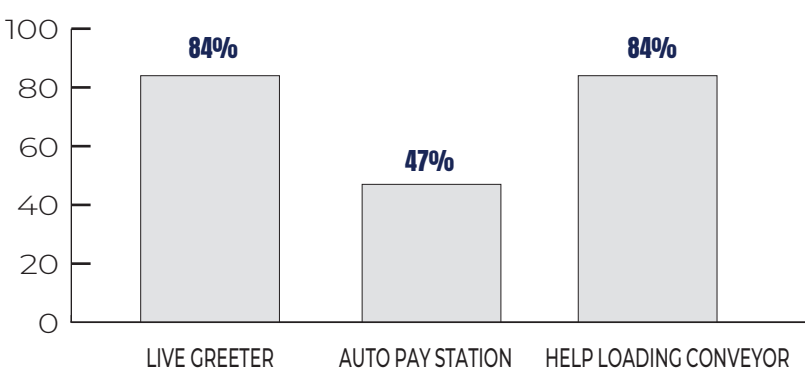
OTHER BUSINESS ON SITE



SERVICES OFFERED ON THE CONVEYOR



TUNNEL ENTRY

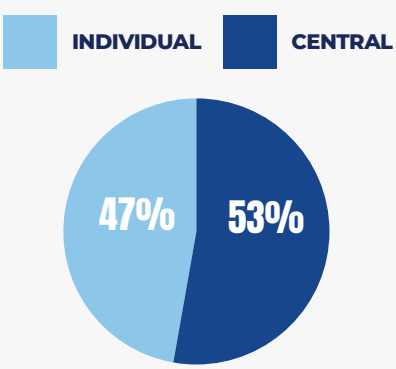


VACUUMS

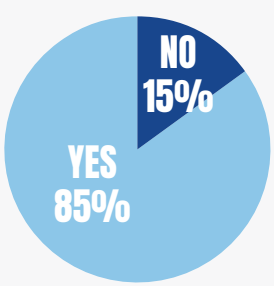
AVERAGE NUMBER OF STALLS

17.6

TYPE



FREE VACS



PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

FRICTION WASH	60%
TOUCHLESS WASH	10%
HYBRID WASH	30%
FLAT BELT CONVEYOR	16%
OVER AND UNDER CONVEYOR	79%
SURFACE CONVEYOR	11%
WASHING CURTAINS	21%
MOTORIZED MITTER CURTAINS	58%
PREP GUNS	68%
COMPUTERIZED CONVEYOR SERVICE	58%
HIGH-PRESSURE FLOOD ARCH	68%
WAX ARCH	84%
FOAM APPLICATOR	95%
TOP BRUSH	58%
TIRE BRUSH	68%
ROCKER BRUSH	84%
WRAPAROUNDS	84%
WINDOW SIDE BRUSH	68%
REVERSE OSMOSIS SYSTEM	63%
AIR DRYERS	100%
DRYING CURTAINS	5%
WATER RECLAIM SYSTEM	58%
TIRE DRESSING APPLICATOR	53%
WATER REPELLENT ARCH	79%
BUBBLER ARCH	26%
"LAVA" APPLICATION	32%
FRICTION DRYING SYSTEM	11%
LED LIGHTING	84%
DIGITAL MENU/SIGNAGE	37%
PAINT SEALANT	32%
CERAMIC COATING	68%

AVERAGE TUNNEL LENGTH

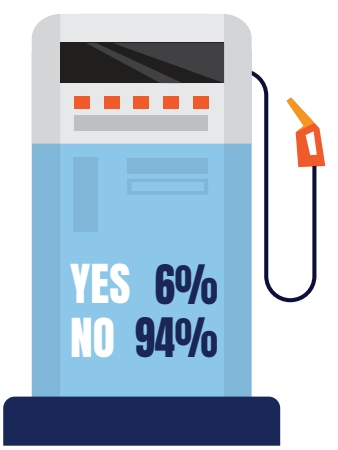
EXTERIOR ONLY	EXPRESS EXTERIOR
87 FEET	96 FEET

OPERATE COIN-OP BAYS ON SITE

EXTERIOR ONLY	EXPRESS EXTERIOR
66%	41%

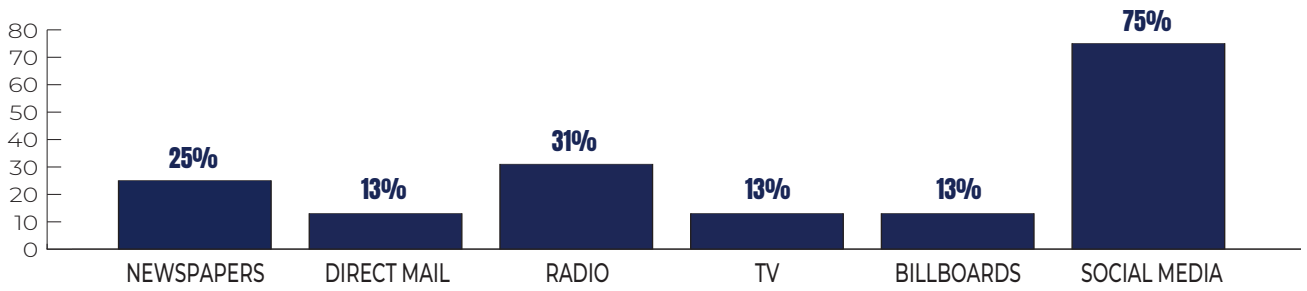
AVERAGE NUMBER OF BAYS	
10	7

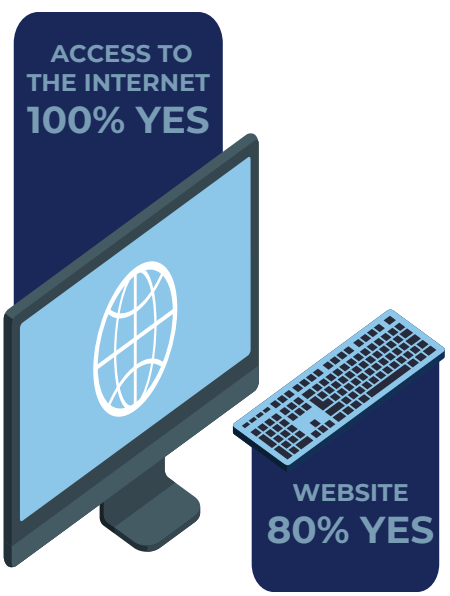
OPERATORS SELLING GASOLINE



ADVERTISING & PROMOTION

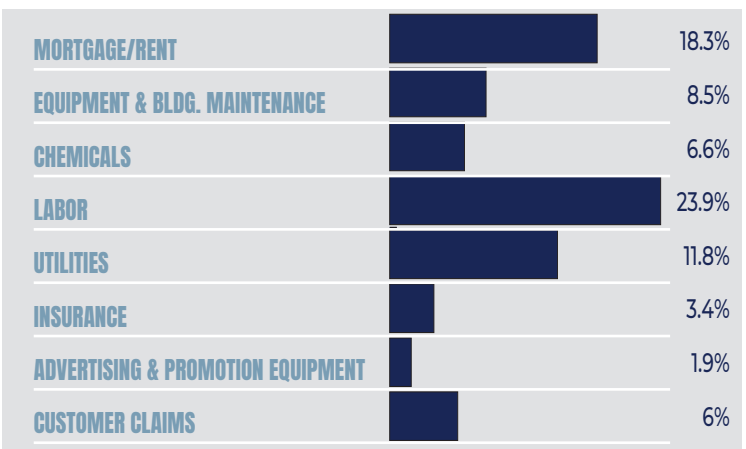
85% of Operators Advertise



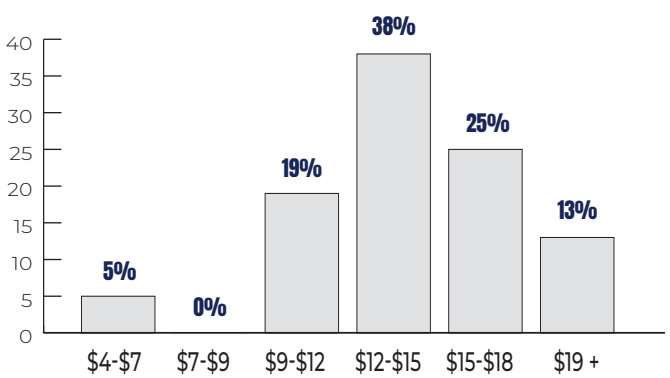


OPERATING COSTS

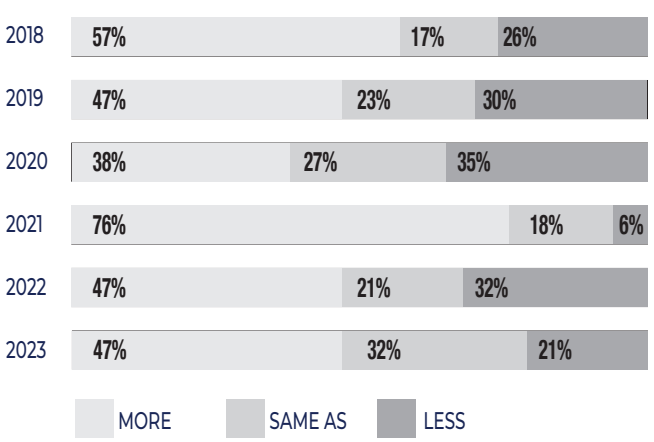
OPERATING COSTS (AS A PERCENTAGE OF TOTAL COST)



GROSS REVENUE PER CAR

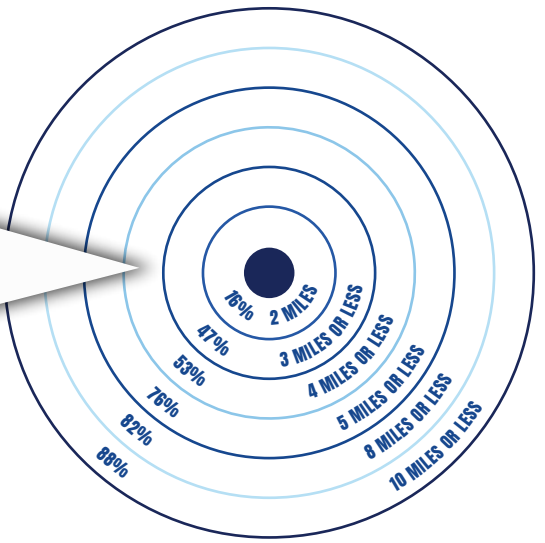


INCOME: CURRENT YEAR VS. PREVIOUS YEAR



HOW FAR DO CUSTOMERS COME?

(PERCENT FROM WITHIN 2-MILE RADIUS, 3-MILE RADIUS, ETC.)

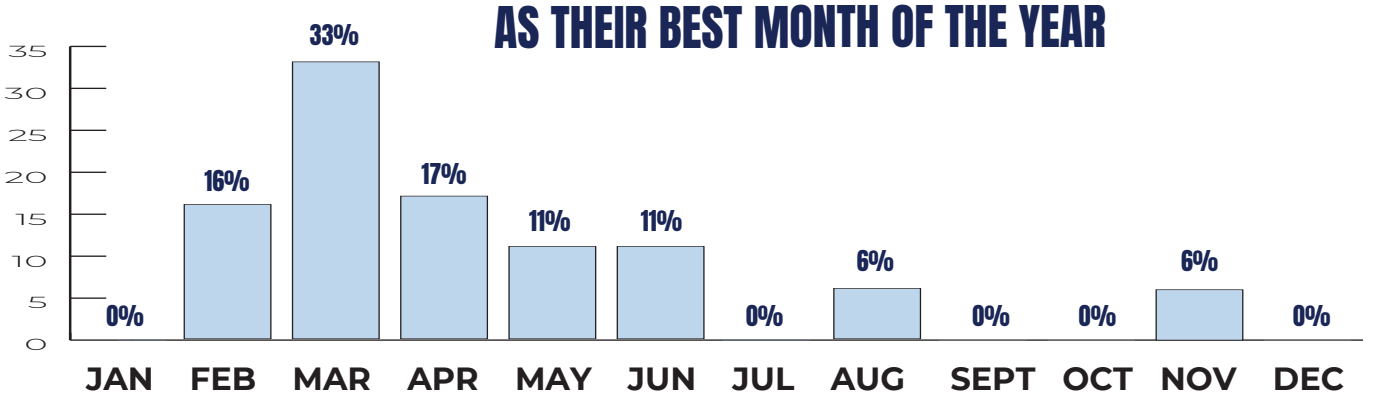


LABOR COSTS

AVG. WAGES PER HOUR PER EMPLOYEE

5%	PAID MINIMUM WAGE TO $10.00 PER HOUR
5%	PAID $10.00 TO $12.00 PER HOUR
10%	PAID $12.00 TO $15.00 PER HOUR
80%	PAID OVER $15.00 PER HOUR

EMPLOYEE UNIFORMS

FULL	60%
PARTIAL	35%
NONE	5%

PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR