The Voice Of The Car Care Industry
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Auto Laundry News
Results From The Auto Laundry News
2025
EXTERIOR CONVEYOR
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Results From The Auto Laundry News

2025 EXTERIOR CONVEYOR SURVEY

The 2025 *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 collected from respondents 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 47 percent of the total response, while express exterior sites account for 53 percent.

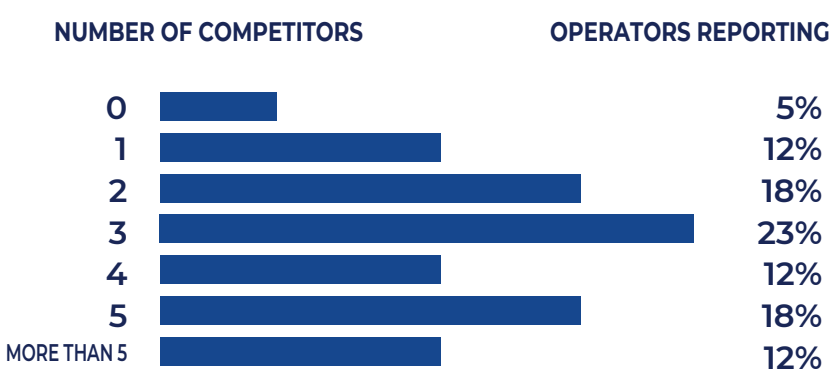
Last year, exterior-only accounted for just 10 percent of survey respondents. The significant increase in the number of exterior-only respondents this year aligns with the survey's historical percentages.

STATE OF THE SEGMENT

For the second year in a row, operators were asked to provide one word that best describes the *current* state of the exterior segment. Sixty percent responded positively, using words like "excellent," "good," and "growing." Around a third were sour on the current state of affairs, with the most common negative response being "oversaturated," highlighting the belief that far too many washes have been built. Less than 10 percent of survey takers provided neutral responses to the question.

This year, a new question was introduced as survey takers were asked for one word that best describes the *future* state of the segment. Echoing the current state responses, around 60 percent provided positive terms, such as "good," "promising," and "growing." Again, the most popular negative response was "saturated," as operators see their overbuilt reality continuing into the foreseeable future. Around 20 percent of survey takers were non-committal about their thoughts on the future, with "unknown" being the most common response.

COMPETING CONVEYOR WASHES IN AREA

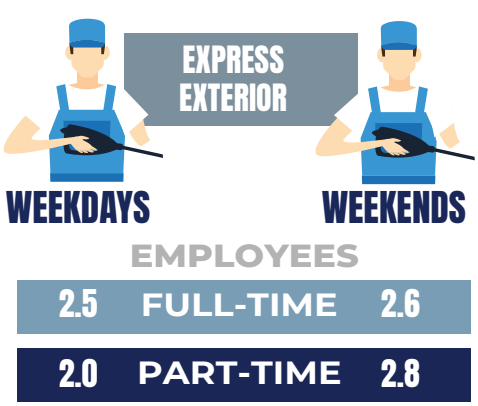


FINANCIAL PERFORMANCE

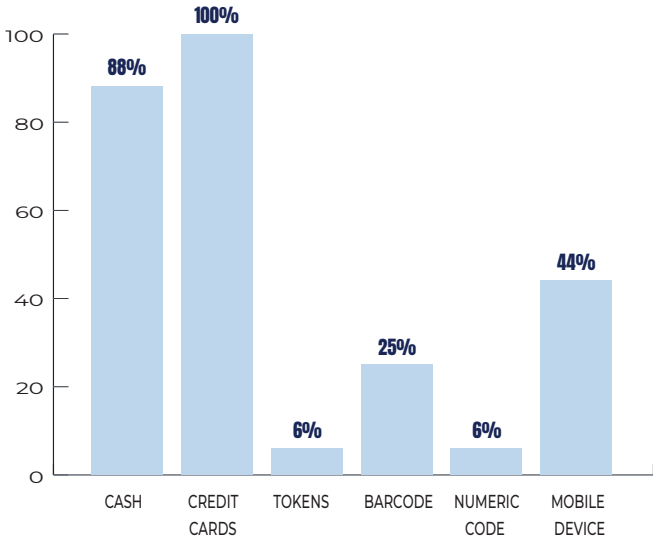
In positive economic news, 72 percent of operators reported an increase in year-over-year income. This is the third-largest cohort to report an increase in the past decade (76 percent reported an increase in 2021 and 78 percent did so in 2015).

Among those who saw sales spike over the past year, the average increase was just over 11 percent, compared to the 9.5 percent average decrease reported by those operators that saw revenues dip.

A six-year perspective on operator financial performance is provided on page 31.



PAYMENT METHOD ACCEPTANCE



PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK

	EXTERIOR ONLY	EXPRESS EXTERIOR
MONDAY	15%	12%
TUESDAY	13%	11%
WEDNESDAY	13%	11%
THURSDAY	13%	12%
FRIDAY	20%	19%
SATURDAY	20%	19%
SUNDAY	6%	16%

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	13	29	36	22
Mountain	29	23	27	21
Midwest	35	27	23	15
Central	32	29	18	21
South Central	20	30	25	25
Southeast	30	26	21	23
Mid-Atlantic	30	35	16	19
New England	*	*	*	*

NOTE: Some results do not total 100 due to rounding

* Too few responces

OPEN SUNDAY

EXTERIOR ONLY	EXPRESS EXTERIOR
78%	100%

OPEN 24 HOURS

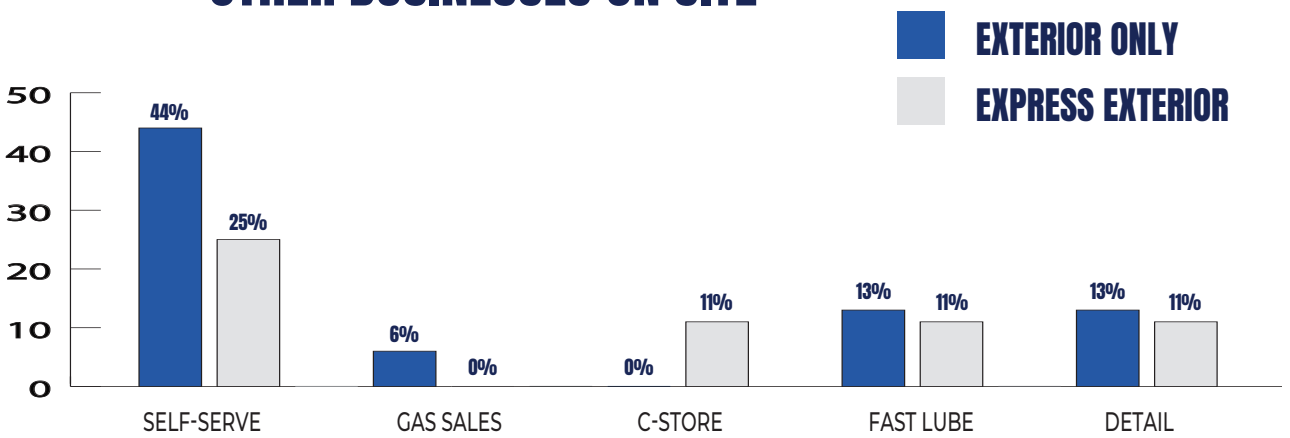
EXTERIOR ONLY	EXPRESS EXTERIOR
0%	0%

AVERAGE DAILY TRAFFIC COUNT
38,392

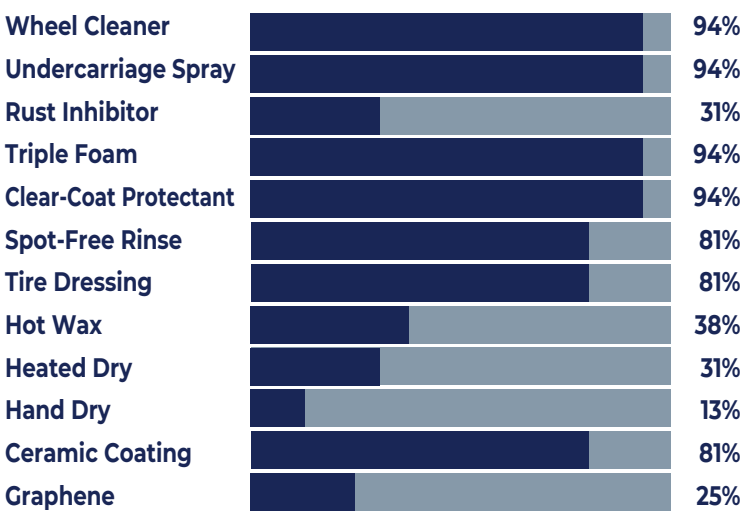
AVERAGE ANNUAL WASH VOLUME
117,031

AVERAGE GROSS REVENUE PER CAR
$14.02

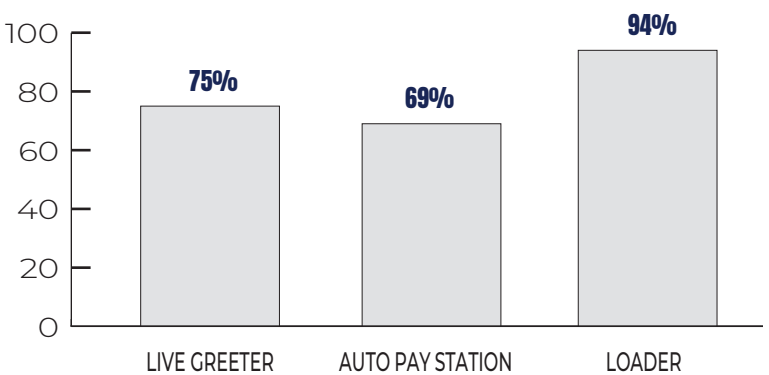
OTHER BUSINESSES ON SITE



SERVICES OFFERED ON THE CONVEYOR



TUNNEL ENTRY

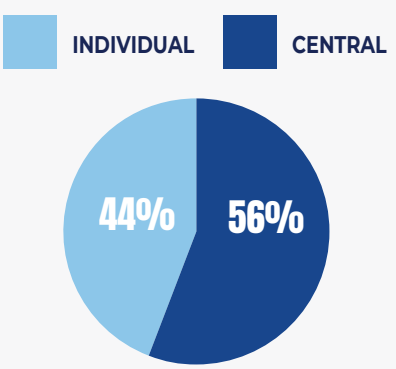


VACUUMS

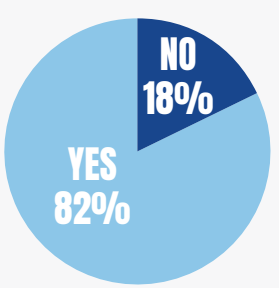
AVERAGE NUMBER OF STALLS

13.6

TYPE



FREE VACS



PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

FRICTION WASH	81%
TOUCHLESS WASH	6%
HYBRID WASH	13%
FLAT BELT CONVEYOR	25%
OVER AND UNDER CONVEYOR	75%
SURFACE CONVEYOR	6%
WASHING CURTAINS	19%
MOTORIZED MITTER CURTAINS	56%
PREP GUNS	81%
COMPUTERIZED CONVEYOR SERVICE	56%
HIGH-PRESSURE FLOOD ARCH	63%
WAX ARCH	88%
FOAM APPLICATOR	100%
TOP BRUSH	94%
TIRE BRUSH	63%
ROCKER BRUSH	100%
WRAPAROUNDS	95%
WINDOW SIDE BRUSH	75%
REVERSE OSMOSIS SYSTEM	63%
AIR DRYERS	100%
DRYING CURTAINS	19%
WATER RECLAIM SYSTEM	50%
TIRE DRESSING APPLICATOR	44%
WATER REPELLENT ARCH	69%
BUBBLER ARCH	13%
"LAVA" APPLICATION	25%
FRICTION DRYING SYSTEM	19%
LED LIGHTING	75%
DIGITAL MENU/SIGNAGE	31%
PAINT SEALANT	56%
CERAMIC COATING	81%

AVERAGE TUNNEL LENGTH

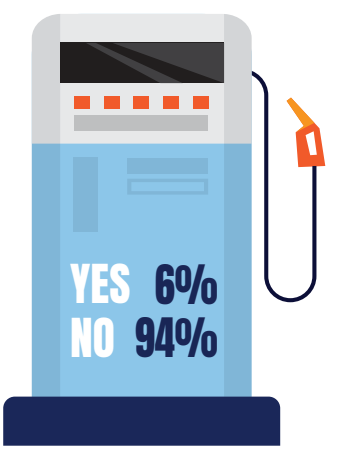
EXTERIOR ONLY	EXPRESS EXTERIOR
95 FEET	120 FEET

OPERATE COIN-OP BAYS ON SITE

EXTERIOR ONLY	EXPRESS EXTERIOR
25%	44%

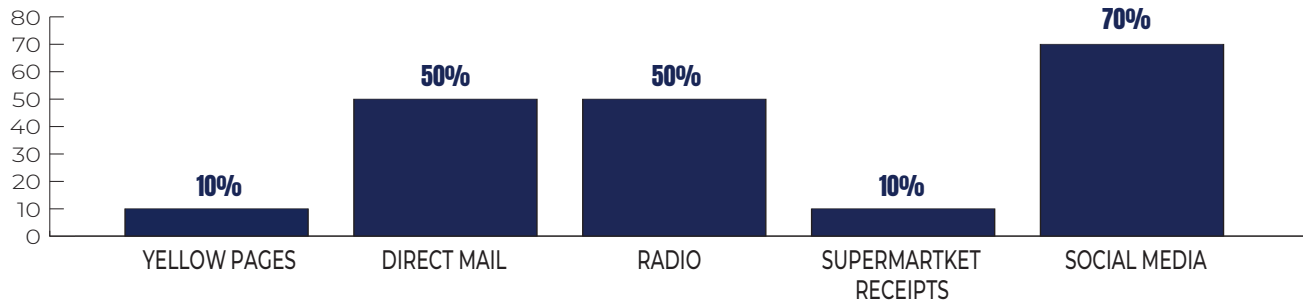
AVERAGE NUMBER OF BAYS	
7	6

OPERATORS SELLING GASOLINE



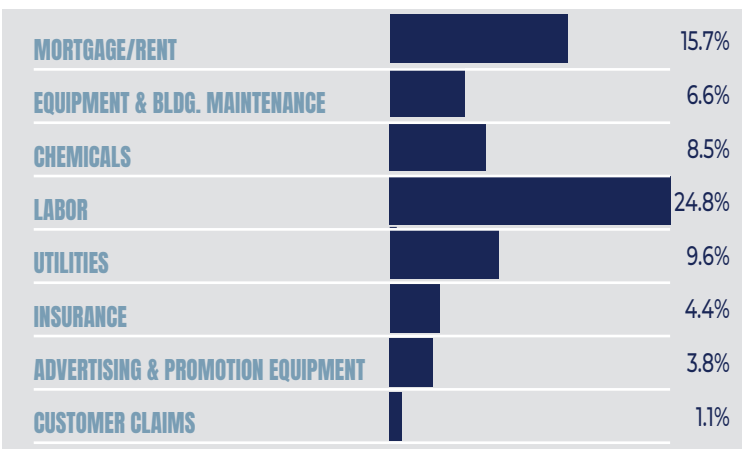
ADVERTISING & PROMOTION

85% of Operators Advertise

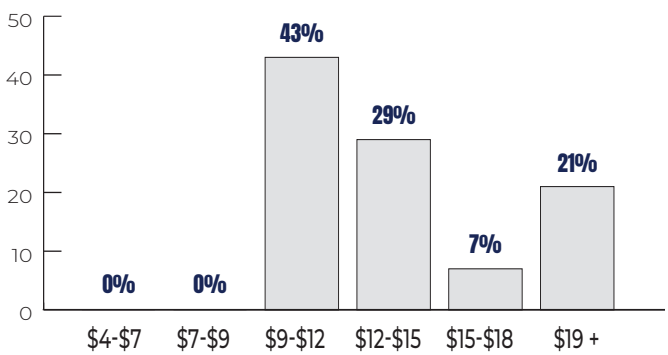


OPERATING COSTS

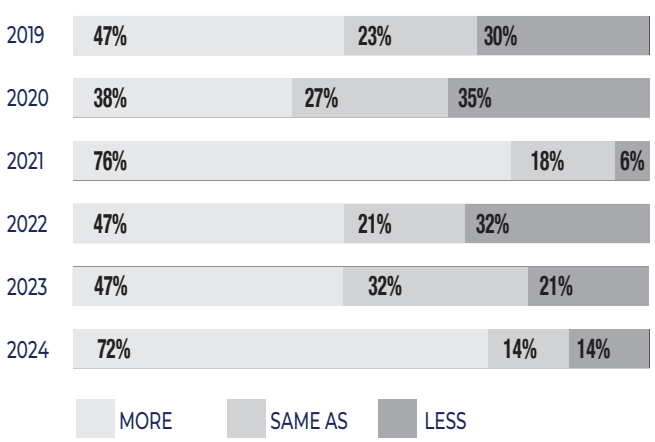
(AS A PERCENTAGE OF TOTAL COST)



GROSS REVENUE PER CAR



INCOME: CURRENT YEAR VS. PREVIOUS YEAR



MARKET SIZE

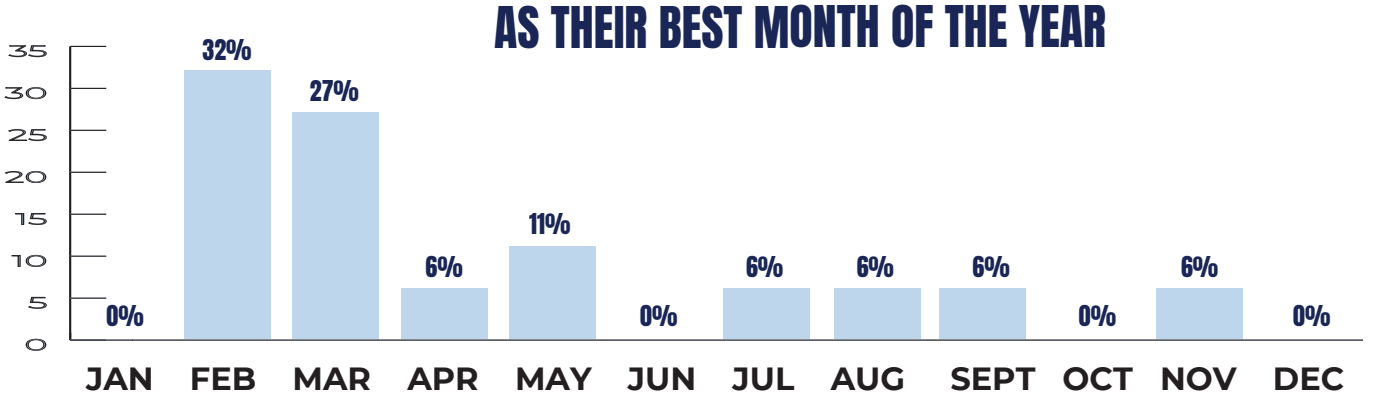
HOW FAR DO CUSTOMERS COME?

LABOR COSTS

AVG. WAGES PER HOUR PER EMPLOYEE

0%	PAID MINIMUM WAGE TO $10.00 PER HOUR
38%	PAID $10.00 TO $15.00 PER HOUR
14%	PAID $15.00 TO $20.00 PER HOUR
19%	PAID OVER $20.00 PER HOUR

EMPLOYEE UNIFORMS

FULL	35%
PARTIAL	59%
NONE	6%

PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR