

AutoLaundry^{news}

Results From The Auto Laundry News 2018 Exterior Conveyor Survey

The 2018 *Auto Laundry News* Exterior Conveyor Survey was conducted through a mailing of questionnaires to a random selection of 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

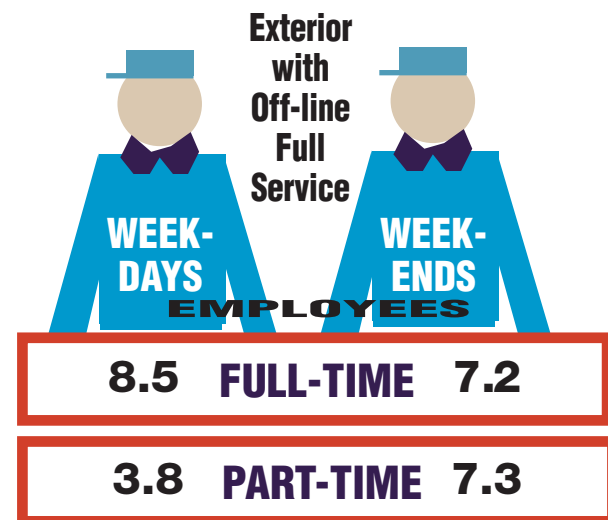
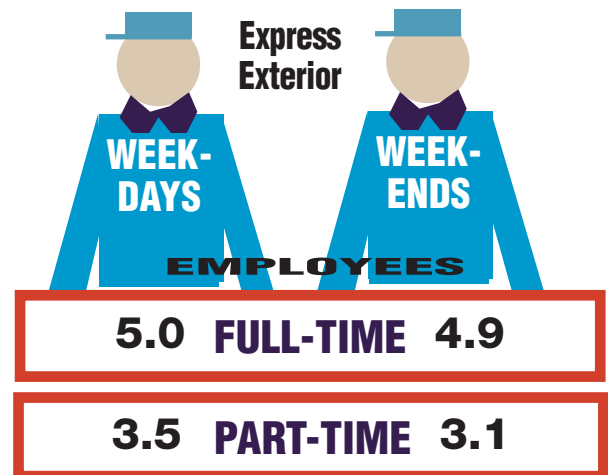
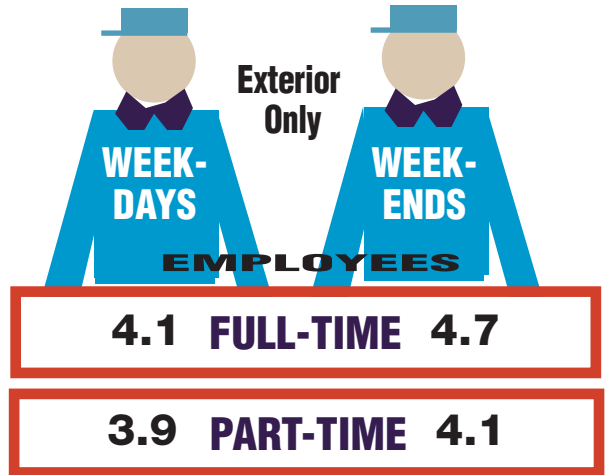
For comparative purposes, respondents are, on occasion, separated into two main categories: exterior-only operations and express-exterior sites. A third category, exterior washes with off-line full service, is employed when relevant. Exterior-only participants make up 45 percent of the total response, express-exterior sites account for 41 percent, and exteriors with off-line full service round out the total with 14 percent.

All respondents self-identify as belonging to one category or another and, as in years past, still exhibit a fluid notion of how they qualify for their chosen label. For example, only 71 percent of express-exterior respondents report using an automated pay station (a format essential), while 59 percent employ a live greeter; few rely on automation alone; many depend on labor. Not surprisingly, exterior-only respondents are less likely to have auto pay stations on site (41 percent) and more likely to make use of live greeters (65 percent).

Express-exterior respondents pay employees more than do exterior-only respondents: 88 percent of the former pay \$10 or more an hour (41 percent more than \$12); zero of the latter reaches these wage levels. Fully a third of exterior-only participants pay minimum wage, while only 6 percent of express-exterior do so.

Revenues

Overall, 63 percent of respondents report income growth over the previous year, a step up from 43 percent last year, though not quite at the 78 percent level recorded for 2015. The graphic on page 42 provides a three-year perspective. Eighty-eight percent of express-exterior participants report growth; 12 percent report declining revenue. The corresponding numbers for exterior-only respondents are 39 percent and 22 percent, with a further 39 percent reporting no change. 📊



COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	8%
1	28%
2	22%
3	22%
4	11%
5	3%
MORE THAN 5	6%

SURVEY

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION

	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	16	11	11	14	16	19	13
Mountain Arizona-Colorado-Idaho-Montana-Nevada- New Mexico-Utah-Wyoming	15	10	11	13	18	20	14
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska- North Dakota-South Dakota	14	11	11	14	19	19	13
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	9	8	17	12	15	23	17
South Central Alabama-Arkansas-Kentucky-Louisiana- Mississippi-Oklahoma-Tennessee-Texas	10	12	11	11	25	21	10
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	10	6	12	13	16	28	15
Mid-Atlantic New Jersey-New York-Pennsylvania	10	10	11	11	17	25	16
New England Connecticut-Maine-Massachusetts- New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

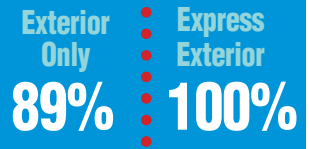
* Too Few Responses Note: Some results do not total 100 due to rounding

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

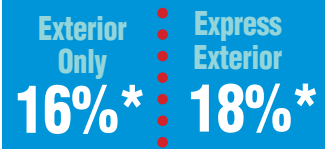
	WINTER	SPRING	SUMMER	FALL
Pacific	16	24	35	25
Mountain	33	20	27	20
Midwest	23	23	30	23
Central	32	26	22	20
South Central	29	26	23	22
Southeast	33	26	16	25
Mid-Atlantic	36	25	19	19
New England	*	*	*	*

* Too Few Responses

OPEN SUNDAY



OPEN 24 HOURS



* Wand self-serve bays only

AVERAGE DAILY TRAFFIC COUNT

AVERAGE ANNUAL WASH VOLUME

AVERAGE MONTHLY IMPULSE SALES

Exterior Only

31,400

77,100

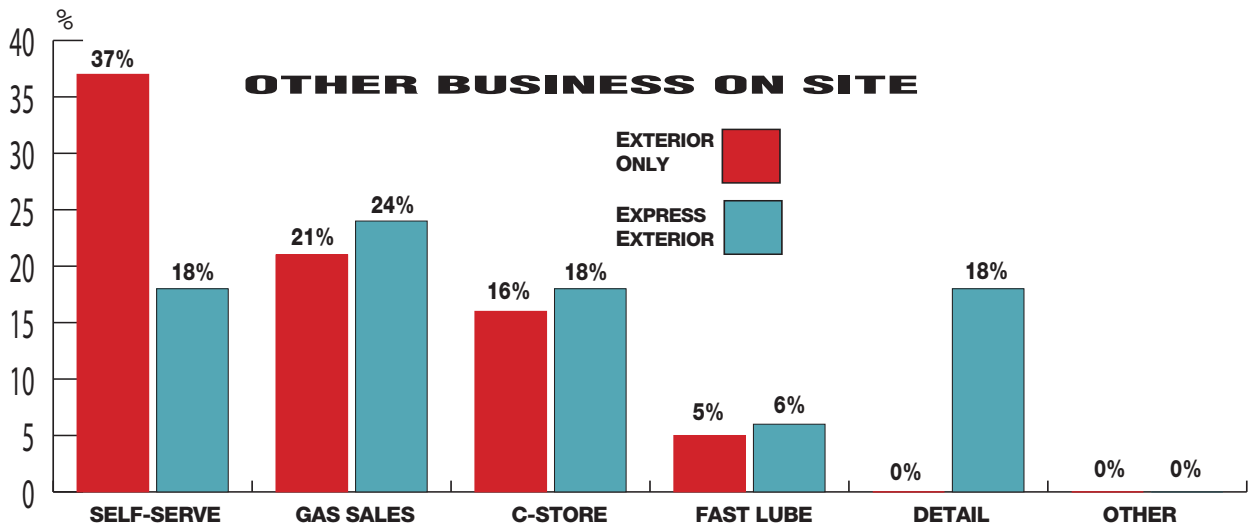
\$400

Express Exterior

35,800

94,200

\$330



SERVICES OFFERED ON THE CONVEYOR

Wheel Cleaner	94%
Undercarriage Spray	79%
Rust and Inhibitor	59%
Triple Foam	85%
Clear-Coat Protectant	97%
Spot-Free Rinse	79%
Tire Dressing	74%
Hot Wax	62%
Heated Dry	38%
Hand Dry	21%

VACUUMS

Exterior Only

12

Express Exterior

16

NUMBER OF STALLS

TYPE

INDIVIDUAL

84% / 16%

CENTRAL

47% / 53%

FREE

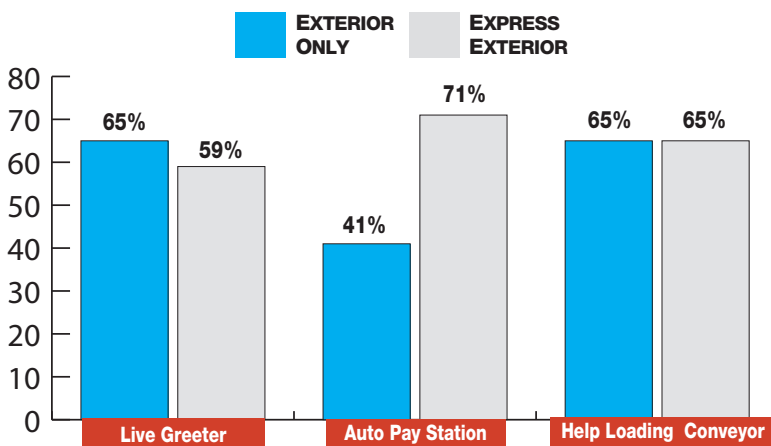
YES

84% NO / 16% YES

NO

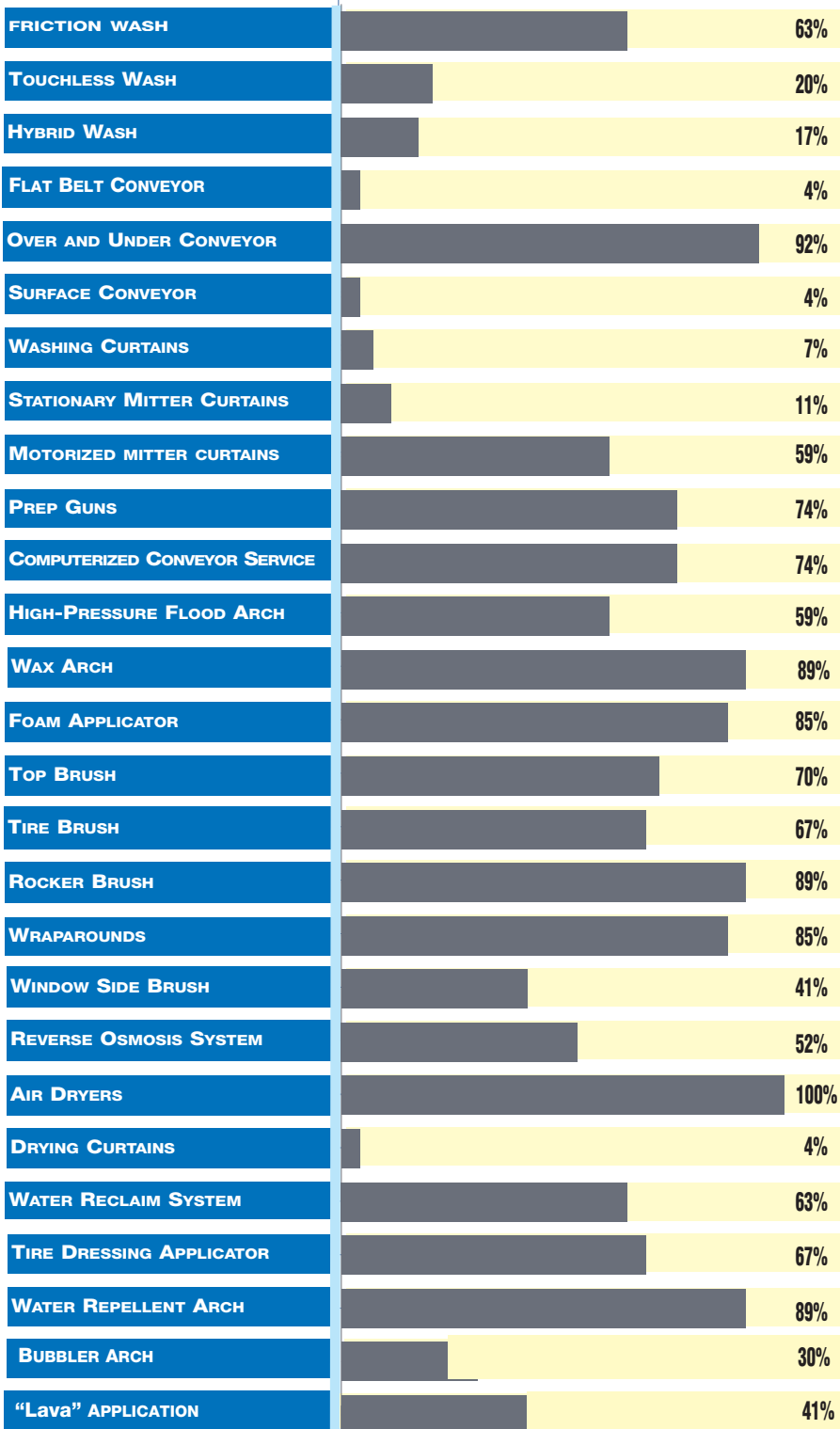
65% YES / 35% NO

TUNNEL ENTRY



SURVEY

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



AVERAGE TUNNEL LENGTH



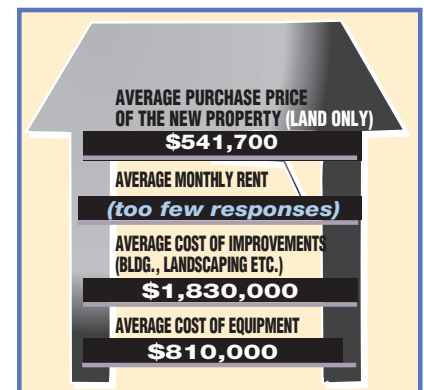
OPERATE COIN-OP BAYS ON SITE



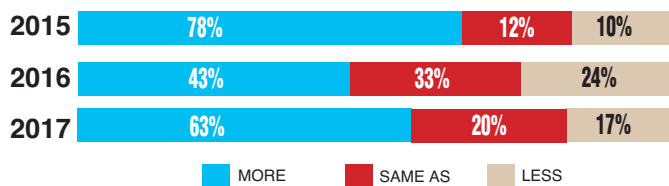
AVERAGE NUMBER OF BAYS



NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR

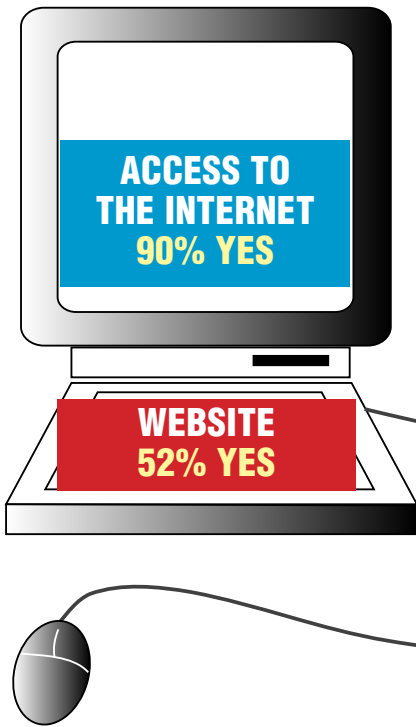
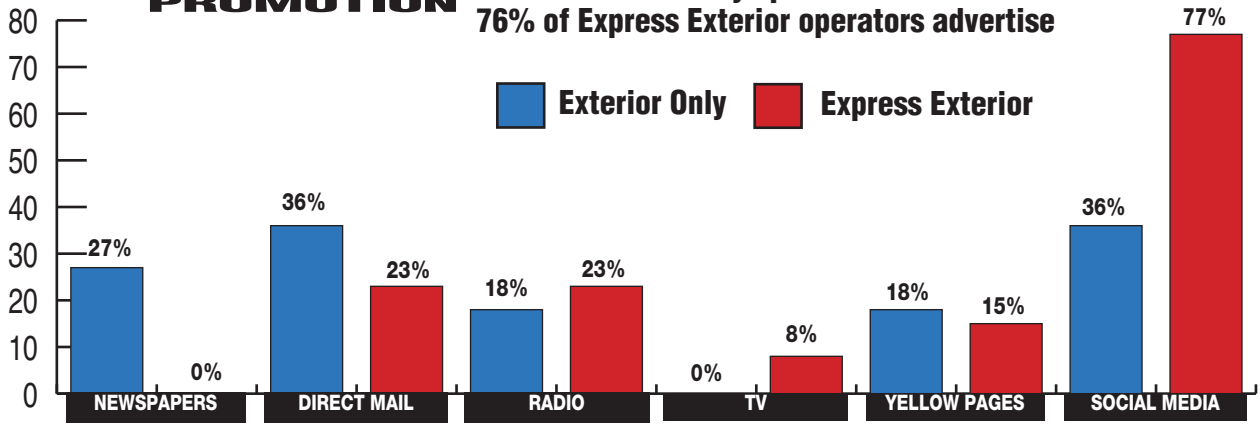


INCOME: CURRENT YEAR VS. PREVIOUS YEAR



ADVERTISING & PROMOTION

58% of Exterior Only operators advertise
76% of Express Exterior operators advertise



OPERATING COSTS

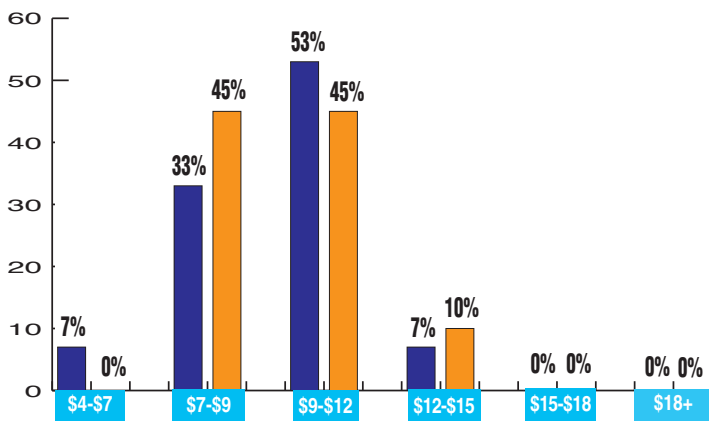
Exterior Only/Express Exterior Operating Costs

(AS A PERCENTAGE OF TOTAL REVENUES)

Category	Exterior Only (%)	Express Exterior (%)
RENT	14.3%	
EQUIPMENT & BLDG. MAINTENANCE	6.0%	
CHEMICALS	7.8%	
LABOR	29.4%	16.8%
UTILITIES	12.3%	
INSURANCE	2.3%	
ADVERTISING & PROMOTION	2.5%	
EQUIPMENT ON LEASE	0%	
CUSTOMER CLAIMS	0.7%	

GROSS REVENUE PER CAR

Exterior Only (Purple) Express Exterior (Orange)

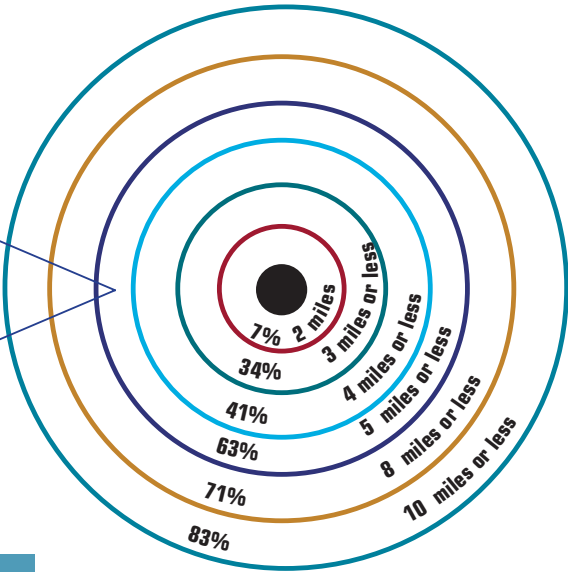


AVERAGE GROSS REVENUE PER CAR



SURVEY

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



LABOR COSTS

