

AutoLaundry^{news}

Results From The Auto Laundry News 2019 Exterior Conveyor Survey

The 2019 *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

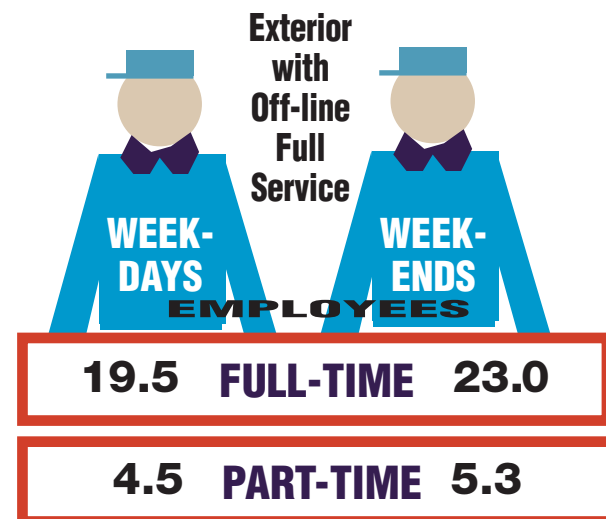
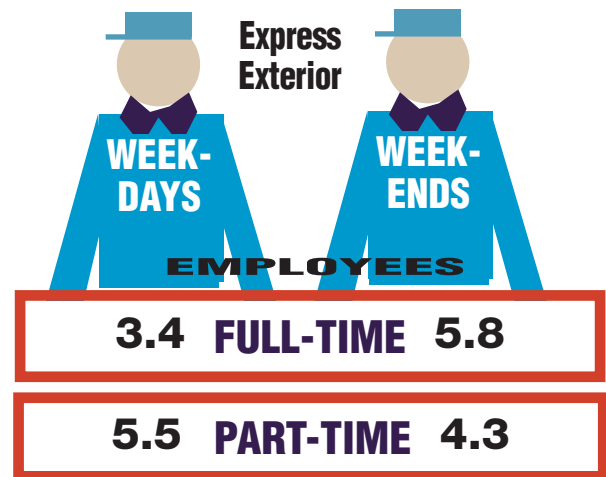
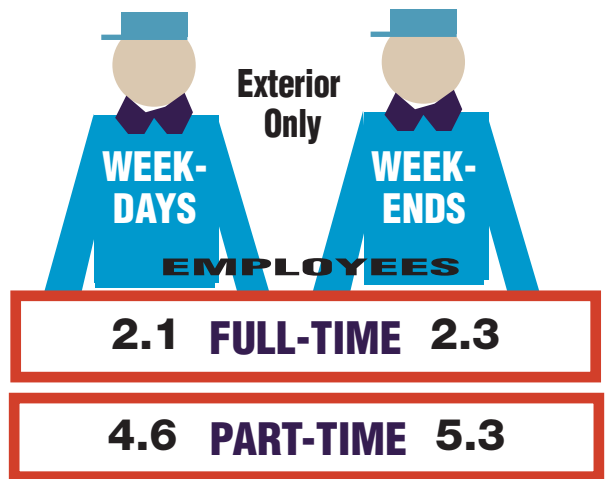
For comparative purposes, respondents are, on occasion, separated into two main categories: exterior-only operations and express-exterior sites. A third category, exterior washes with off-line full service, is employed when relevant. Exterior-only participants make up 35 percent of the total response, express-exterior sites account for 55 percent, and exteriors with off-line full service round out the total with 10 percent. This is the first time a majority of respondents are from the express-exterior category — last year, they accounted for 41 percent of the response pool and 33 percent the year before that.

All respondents self-identify as belonging to one category or another and, as in the past, there is some confusion as to what constitutes an exterior-only wash as opposed to an express-exterior wash. For example, only 76 percent of express-exterior respondents report using an automated pay station, considered a distinguishing feature of the format — but fully a third of exterior-only respondents employ the same equipment; 77 percent of express-exteriors offer free vacuuming (another defining express-exterior feature), yet 21 percent of exterior-only sites do the same.

In both main categories, respondents in far greater numbers than in the previous survey house self-service bays on their conveyors sites: 64 percent of exterior-only respondents and 32 percent of express-exterior participants report doing so. The comparable percentages in last year's survey were 37 and 18, respectively.

Revenues

Overall, 57 percent of respondents report income growth over the previous year, a small step down from 63 percent last year. The graphic on page 43 provides a three-year perspective. Seventy-four percent of express-exterior participants report growth; 16 percent report declining revenue. The corresponding numbers for exterior-only respondents are 31 percent and 46 percent. 



COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	7%
1	15%
2	15%
3	20%
4	17%
5	10%
MORE THAN 5	17%

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION

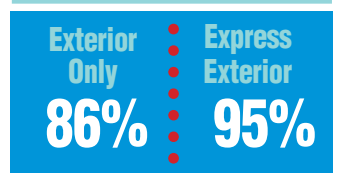
	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	*	*	*	*	*	*	*
Mountain Arizona-Colorado-Idaho-Montana-Nevada- New Mexico-Utah-Wyoming	15	13	10	13	25	17	7
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska- North Dakota-South Dakota	13	6	10	13	23	28	7
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	12	7	15	20	20	15
South Central Alabama-Arkansas-Kentucky-Louisiana- Mississippi-Oklahoma-Tennessee-Texas	15	13	13	13	18	17	11
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	5	15	10	11	17	30	12
Mid-Atlantic New Jersey-New York-Pennsylvania	11	10	11	11	16	26	15
New England Connecticut-Maine-Massachusetts- New Hampshire-Rhode Island-Vermont	10	5	4	11	15	33	23

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

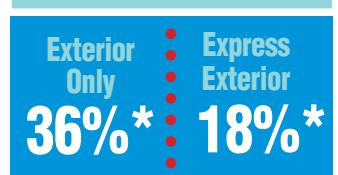
PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	28	26	30	16
Mountain	33	27	20	20
Midwest	30	25	25	20
Central	42	16	28	14
South Central	18	39	26	17
Southeast	31	26	21	22
Mid-Atlantic	40	23	14	24
New England	35	33	15	18

OPEN SUNDAY



OPEN 24 HOURS



* Wand self-serve bays only

AVERAGE DAILY TRAFFIC COUNT

AVERAGE ANNUAL WASH VOLUME

AVERAGE GROSS REVENUE PER CAR

Exterior Only

18,500

52,200

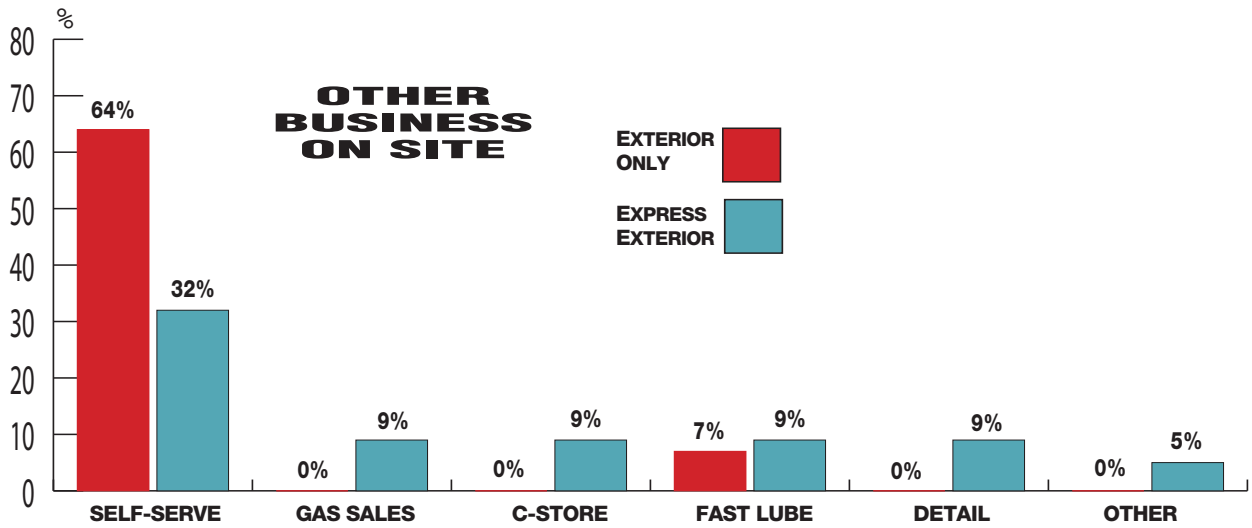
\$10.59

Express Exterior

35,800

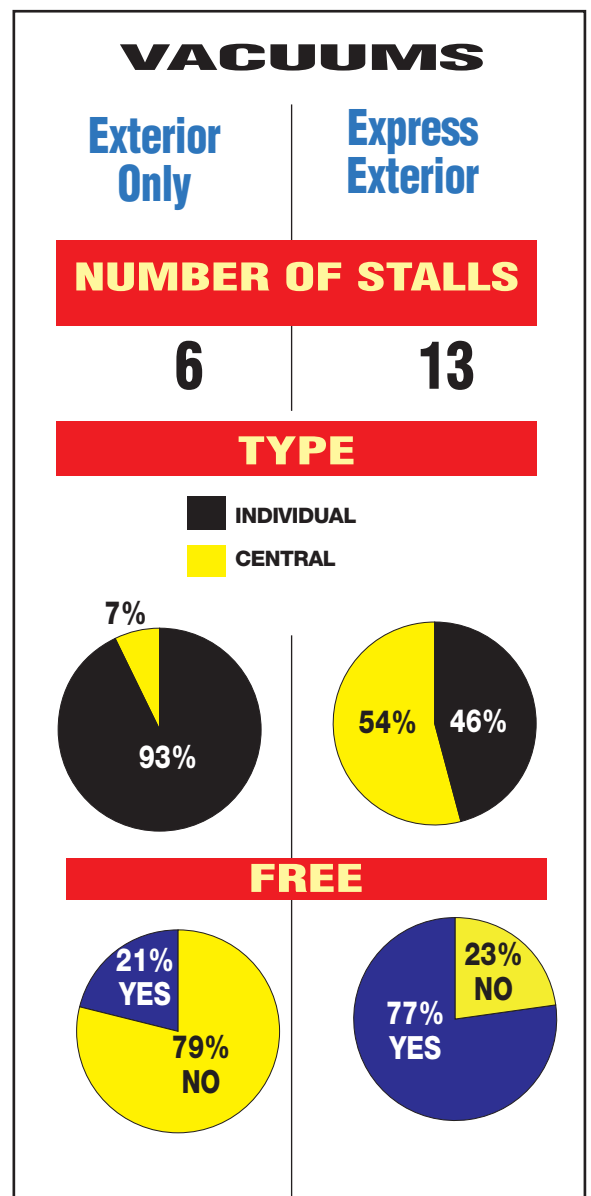
118,000

\$9.69

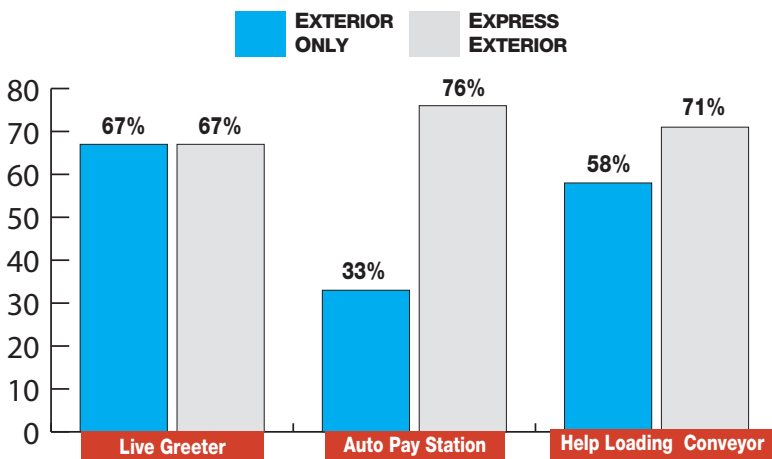


SERVICES OFFERED ON THE CONVEYOR

Wheel Cleaner	89%
Undercarriage Spray	89%
Rust and Inhibitor	46%
Triple Foam	92%
Clear-Coat Protectant	89%
Spot-Free Rinse	73%
Tire Dressing	68%
Hot Wax	62%
Heated Dry	16%
Hand Dry	22%



TUNNEL ENTRY



SURVEY

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

FRICITION WASH	58%
TOUCHLESS WASH	14%
HYBRID WASH	28%
FLAT BELT CONVEYOR	16%
OVER AND UNDER CONVEYOR	80%
SURFACE CONVEYOR	4%
WASHING CURTAINS	8%
STATIONARY MITTER CURTAINS	16%
MOTORIZED MITTER CURTAINS	68%
PREP GUNS	68%
COMPUTERIZED CONVEYOR SERVICE	64%
HIGH-PRESSURE FLOOD ARCH	48%
WAX ARCH	84%
FOAM APPLICATOR	76%
TOP BRUSH	36%
TIRE BRUSH	60%
ROCKER BRUSH	76%
WRAPAROUNDS	100%
WINDOW SIDE BRUSH	52%
REVERSE OSMOSIS SYSTEM	60%
AIR DRYERS	100%
DRYING CURTAINS	0%
WATER RECLAIM SYSTEM	48%
TIRE DRESSING APPLICATOR	56%
WATER REPELLENT ARCH	84%
BUBBLER ARCH	40%
"Lava" APPLICATION	48%
FRICITION DRYING SYSTEM	4%
LED LIGHTING	76%
DIGITAL MENU/SIGNAGE	36%

AVERAGE TUNNEL LENGTH

EXTERIOR ONLY	EXPRESS EXTERIOR
89 FEET	114 FEET

OPERATE COIN-OP BAYS ON SITE

EXTERIOR ONLY	EXPRESS EXTERIOR
64%	32%

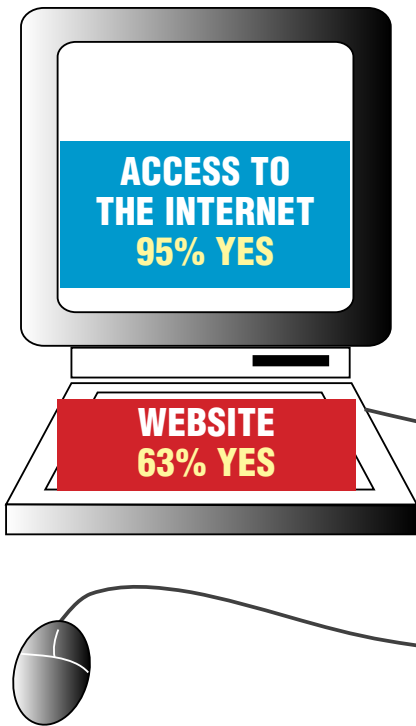
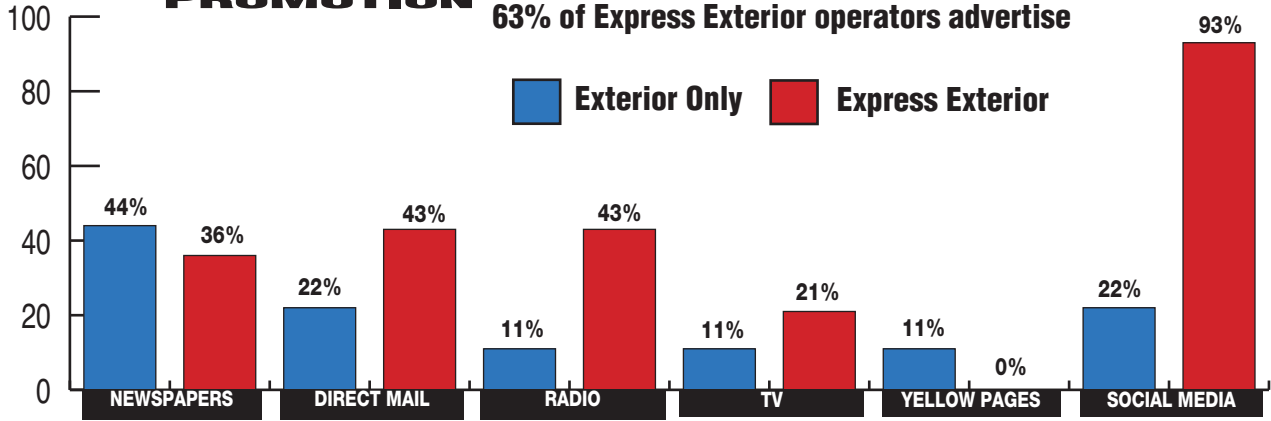
AVERAGE NUMBER OF BAYS	
4.9	6.0

NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR

AVERAGE PURCHASE PRICE OF THE NEW PROPERTY (LAND ONLY)	\$1,008,000
AVERAGE MONTHLY RENT	<i>(too few responses)</i>
AVERAGE COST OF IMPROVEMENTS (BLDG., LANDSCAPING ETC.)	\$3,330,000
AVERAGE COST OF EQUIPMENT	\$816,000

ADVERTISING & PROMOTION

64% of Exterior Only operators advertise
63% of Express Exterior operators advertise



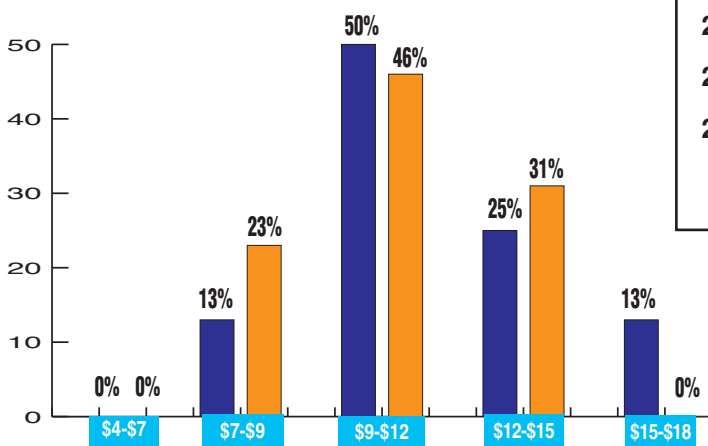
OPERATING COSTS

Exterior Only/Express Exterior Operating Costs
(AS A PERCENTAGE OF TOTAL REVENUES)

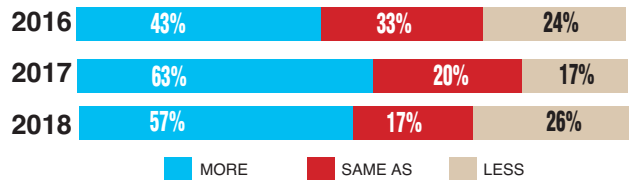
Category	Exterior Only (%)	Express Exterior (%)
RENT	14.4%	
EQUIPMENT & BLDG. MAINTENANCE	4.9%	
CHEMICALS	6.9%	
LABOR	30.0%	15.7%
UTILITIES	8.9%	
INSURANCE	1.9%	
ADVERTISING & PROMOTION	2.7%	
EQUIPMENT ON LEASE	0%	
CUSTOMER CLAIMS	0.5%	

GROSS REVENUE PER CAR

Exterior Only
Express Exterior

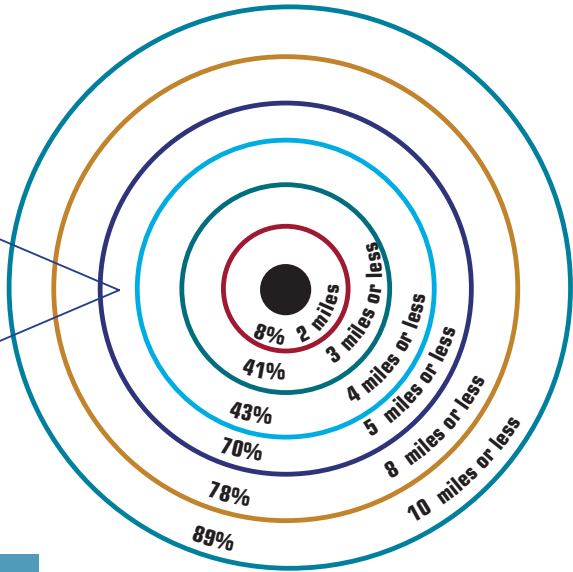


INCOME: CURRENT YEAR VS. PREVIOUS YEAR



SURVEY

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



LABOR COSTS

