

# AutoLaundry<sup>news</sup>

# Results From The Auto Laundry News 2021 Exterior Conveyor Survey

**T**he 2021 *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 34 percent of the total response, express-exterior sites account for 59 percent, and exteriors with off-line full service round out the total with 7 percent. Last year the split was 36/52/12.

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 report operating an unlimited monthly wash club with an average age of 4.5 years and membership averaging 2,154. Only 20 percent of exterior-only sites offer wash club memberships and average 511 subscribers.

### Revenues

Overall, 38 percent of respondents report income growth over the previous year, a retreat from 47 percent last year and the third consecutive year of shrinking numbers. The graphic on page 35 provides a five-year perspective. This reversal is attributed largely to performance at exterior-only sites, only 22 percent of which reported income growth averaging 9 percent. By comparison, 53 percent of express-exterior locations did so with an average increase of 12.1 percent. Forty-four percent of exterior-only respondents report income declining by an average of 21.7 percent; 20 percent of express-exterior participants report reversals averaging 9 percent.

As a group, exterior washes fared better under COVID-19 restrictions than did full-serve washes: 30 percent of exterior-only washes closed for an average of four weeks; 24 percent of express exterior sites closed for an average of 3.75 weeks. This compares to 63 percent of full-service washes that closed for an average of seven weeks due to COVID-19 restrictions. 📷



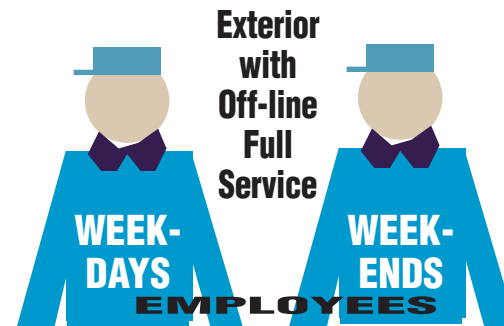
**3.8 FULL-TIME 4.0**

**2.2 PART-TIME 1.4**



**4.2 FULL-TIME 4.9**

**3.1 PART-TIME 3.3**



**4.0 FULL-TIME 4.0**

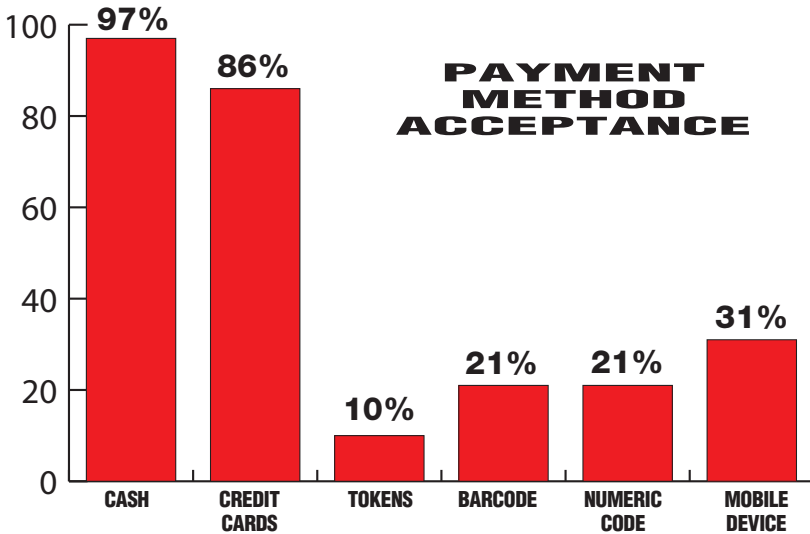
**7.0 PART-TIME 7.0**

### COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	6%
1	28%
2	28%
3	19%
4	0%
5	16%
MORE THAN 5	3%

# SURVEY

## PERCENTAGE OF BUSINESS DONE BY DAY OF THE WEEK



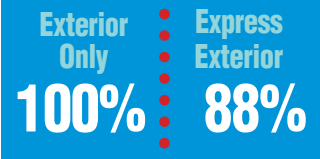
	EXTERIOR ONLY	EXPRESS EXTERIOR
MONDAY	13	11
TUESDAY	11	11
WEDNESDAY	13	11
THURSDAY	11	13
FRIDAY	21	18
SATURDAY	18	22
SUNDAY	14	15

## PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

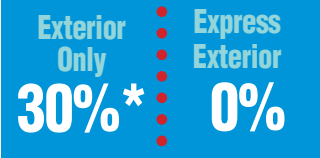
	WINTER	SPRING	SUMMER	FALL
Pacific	20	22	42	17
Mountain	28	25	25	23
Midwest	30	22	29	20
Central	52	20	15	13
South Central	24	30	22	24
Southeast	36	24	19	21
Mid-Atlantic	30	25	23	23
New England	*	*	*	*

\* Too Few Responses

## 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**

**18,400**

**51,000**

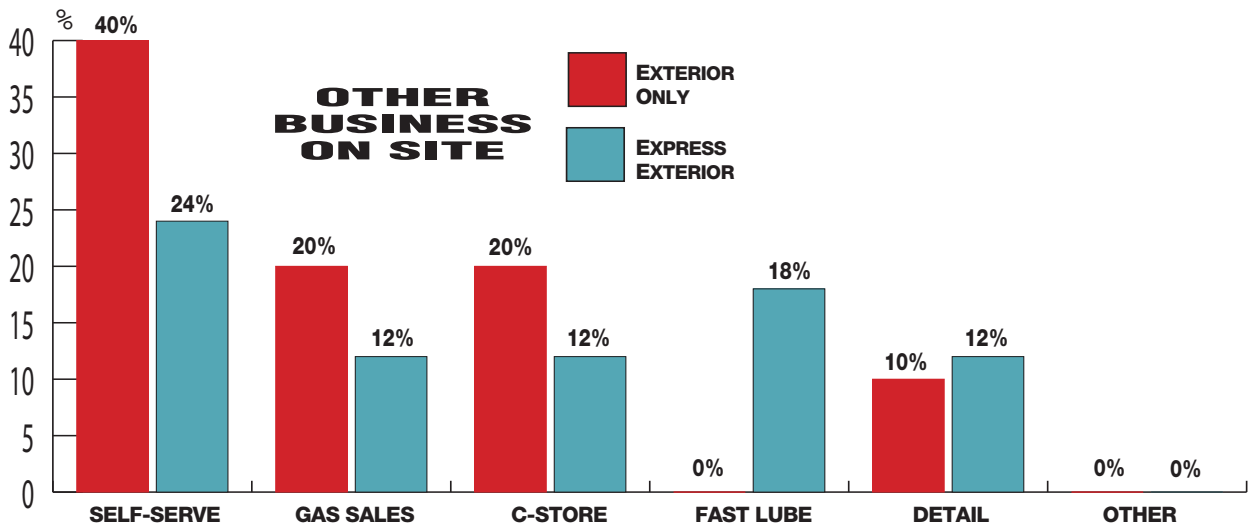
**\$11.40**

**Express Exterior**

**32,400**

**165,800**

**\$10.47**

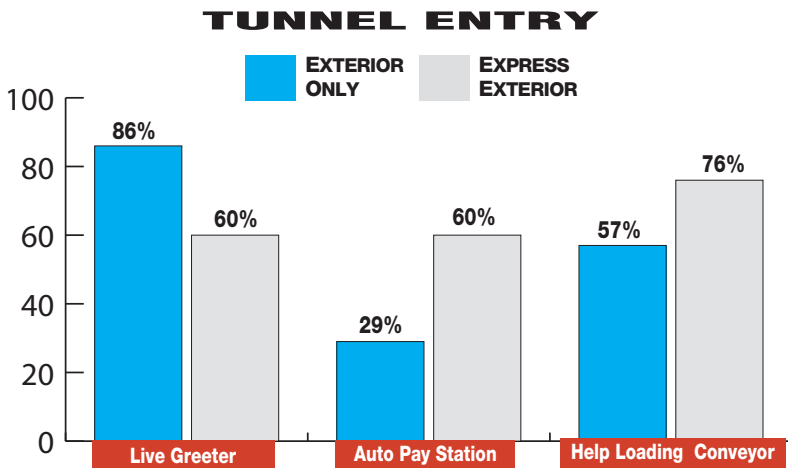


### SERVICES OFFERED ON THE CONVEYOR

Wheel Cleaner	91%
Undercarriage Spray	91%
Rust and Inhibitor	35%
Triple Foam	87%
Clear-Coat Protectant	96%
Spot-Free Rinse	87%
Tire Dressing	70%
Hot Wax	87%
Heated Dry	17%
Hand Dry	9%
Ceramic Coating	44%

### VACUUMS

Exterior Only	Express Exterior
<b>NUMBER OF STALLS</b>	
6	17
<b>TYPE</b>	
<ul style="list-style-type: none"> <li>INDIVIDUAL</li> <li>CENTRAL</li> </ul>	<ul style="list-style-type: none"> <li>INDIVIDUAL</li> <li>CENTRAL</li> </ul>
<b>FREE</b>	



# PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

# SURVEY

FRICION WASH	64%
TOUCHLESS WASH	18%
HYBRID WASH	18%
FLAT BELT CONVEYOR	17%
OVER AND UNDER CONVEYOR	78%
SURFACE CONVEYOR	6%
WASHING CURTAINS	6%
STATIONARY MITTER CURTAINS	6%
MOTORIZED MITTER CURTAINS	78%
PREP GUNS	61%
COMPUTERIZED CONVEYOR SERVICE	56%
HIGH-PRESSURE FLOOD ARCH	33%
WAX ARCH	83%
FOAM APPLICATOR	83%
TOP BRUSH	44%
TIRE BRUSH	44%
ROCKER BRUSH	72%
WRAPAROUNDS	67%
WINDOW SIDE BRUSH	39%
REVERSE OSMOSIS SYSTEM	56%
AIR DRYERS	89%
DRYING CURTAINS	17%
WATER RECLAIM SYSTEM	39%
TIRE DRESSING APPLICATOR	44%
WATER REPELLENT ARCH	61%
BUBBLER ARCH	22%
"Lava" APPLICATION	44%
FRICION DRYING SYSTEM	6%
LED LIGHTING	61%
DIGITAL MENU/SIGNAGE	33%
PAINT SEALANT	44%
CERAMIC COATING	44%

## AVERAGE TUNNEL LENGTH

<b>EXTERIOR ONLY</b>	<b>EXPRESS EXTERIOR</b>
<b>83 FEET</b>	<b>119 FEET</b>

## OPERATE COIN-OP BAYS ON SITE

<b>EXTERIOR ONLY</b>	<b>EXPRESS EXTERIOR</b>
<b>40%</b>	<b>24%</b>

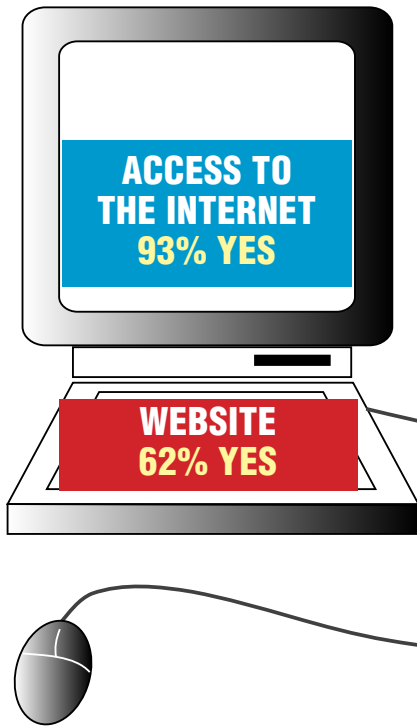
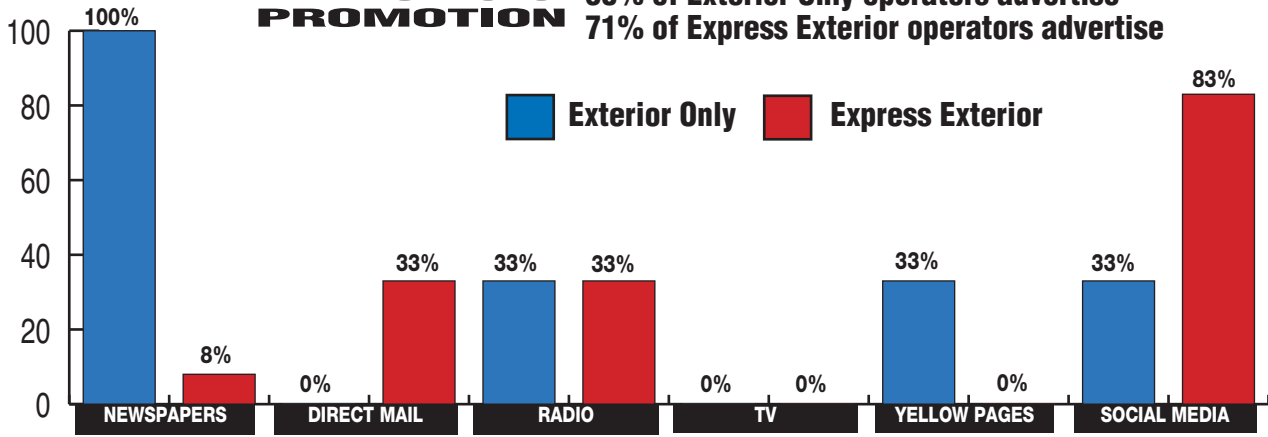
## AVERAGE NUMBER OF BAYS

<b>5.8</b>	<b>6.3</b>
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## NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR

AVERAGE PURCHASE PRICE OF THE NEW PROPERTY (LAND ONLY)	<b>\$890,800</b>
AVERAGE MONTHLY RENT	<i>(too few responses)</i>
AVERAGE COST OF IMPROVEMENTS (BLDG., LANDSCAPING ETC.)	<b>\$2,617,000</b>
AVERAGE COST OF EQUIPMENT	<b>\$974,200</b>

**ADVERTISING & PROMOTION** 30% of Exterior Only operators advertise  
71% of Express Exterior operators advertise

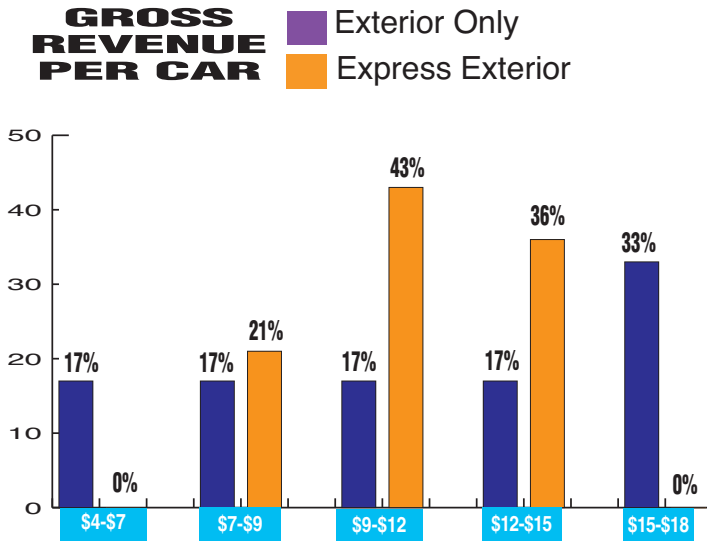


**OPERATING COSTS**

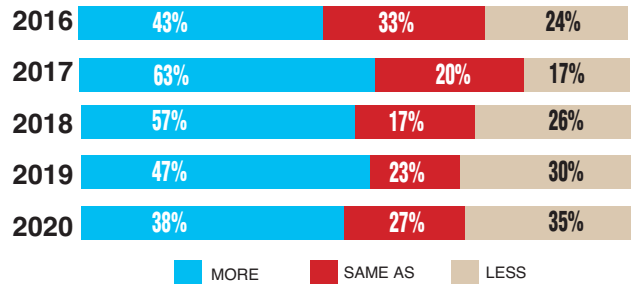
Exterior Only/Express Exterior Operating Costs  
(AS A PERCENTAGE OF TOTAL REVENUES)

Category	Exterior Only (%)	Express Exterior (%)
RENT	11.6%	
EQUIPMENT & BLDG. MAINTENANCE	2.7%	
CHEMICALS	6.1%	
LABOR	32.0%	18.5%
UTILITIES	9.1%	
INSURANCE	2.1%	
ADVERTISING & PROMOTION	1.7%	
EQUIPMENT ON LEASE	2.5%	
CUSTOMER CLAIMS	0.5%	

**GROSS REVENUE PER CAR**

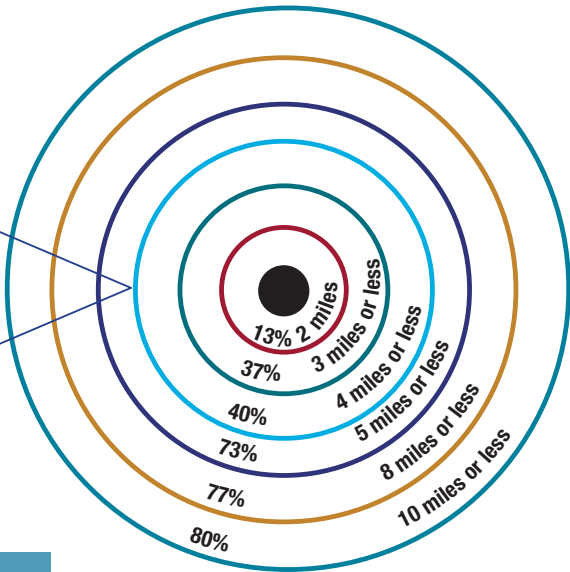


**INCOME: CURRENT YEAR VS. PREVIOUS YEAR**



**SURVEY**

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



**LABOR COSTS**

