

AutoLaundry^{news}

SURVEY

**Results From The Auto Laundry News
Exterior Conveyor
Survey 2014**

The 2014 *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

This report represents part two of our first attempt at separating exterior washes from full- and flex-service operations in our annual conveyor surveys. A report on part one, our survey of full- and flex-service operations, appeared in the March issue.

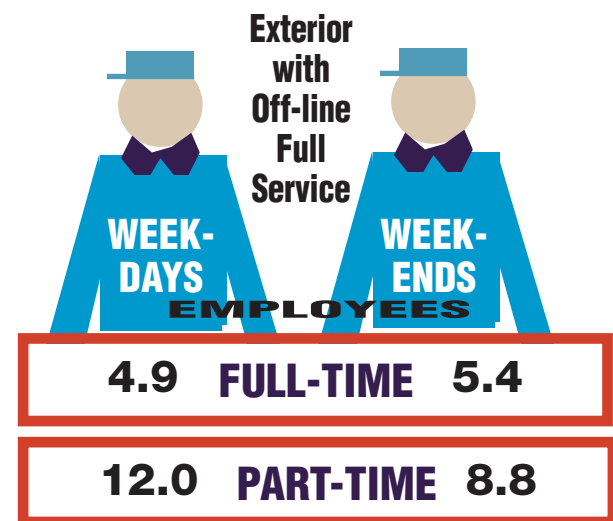
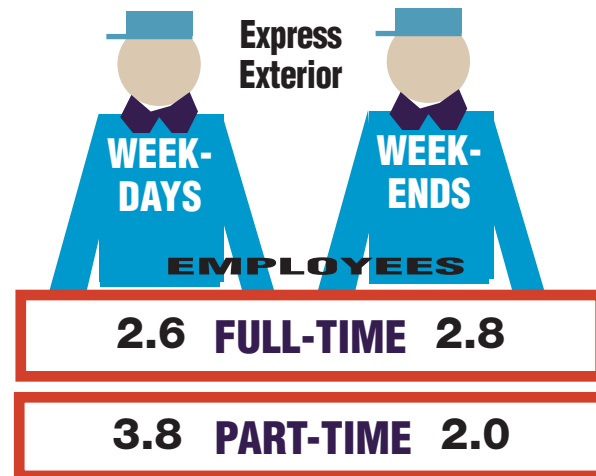
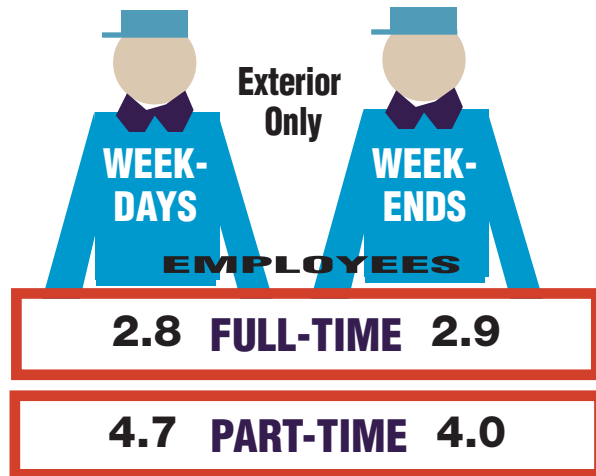
For comparative purposes, respondents are, on occasion, separated into two main categories: exterior-only operations and express-exterior sites. A third category, exterior washes with off-line full service, is employed when relevant. Exterior-only participants make up 54 percent of the total response, express-exterior sites account for 33 percent, and exteriors with off-line full service round out the total with 13 percent.

As was the case in the March survey report, there is some fluidity in how operators view their washes. For example, although many consider automatic pay stations and free self-serve vacuuming essential elements of the express-exterior format, only 57 percent of respondents identifying as such employ the former and 67 percent offer the latter. On the other hand, 21 percent of exterior-only respondents make use of automatic pay stations and 35 percent offer free self-serve vacuuming.

Revenues

Overall, 74 percent of respondents report increased income compared to the previous year. The graphic on page 40 provides a partial four-year perspective. Express-exterior participants outperform exterior-only respondents: an astounding 94 percent of the former report income growth; 66 percent of the latter do so. Even more impressive: not a single express-exterior operation reports declining income, while 25 percent of exterior-only washes do so.

Express-exterior operations report an average income growth of 12.2 percent over the previous year. Exterior-only respondents, who made progress, report 13.9 percent average growth, while those who experienced reversals report an average decline in income of 9.8 percent.



COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	8%
1	24%
2	28%
3	17%
4	11%
5	5%
MORE THAN 5	7%

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	13	12	13	15	19	17	11
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	15	12	12	13	18	19	11
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	*	*	*	*	*	*	*
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	10	10	11	21	26	12
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	13	12	12	14	20	23	6
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	11	10	14	13	19	21	12
Mid-Atlantic New Jersey-New York-Pennsylvania	10	8	8	10	20	28	16
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	12	10	11	11	18	19	19

* Too Few Responses

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	24	26	32	18
Mountain	26	24	27	23
Midwest	*	*	*	*
Central	45	20	19	16
South Central	28	26	22	24
Southeast	28	27	17	28
Mid-Atlantic	40	23	20	17
New England	37	27	18	18

* Too Few Responses

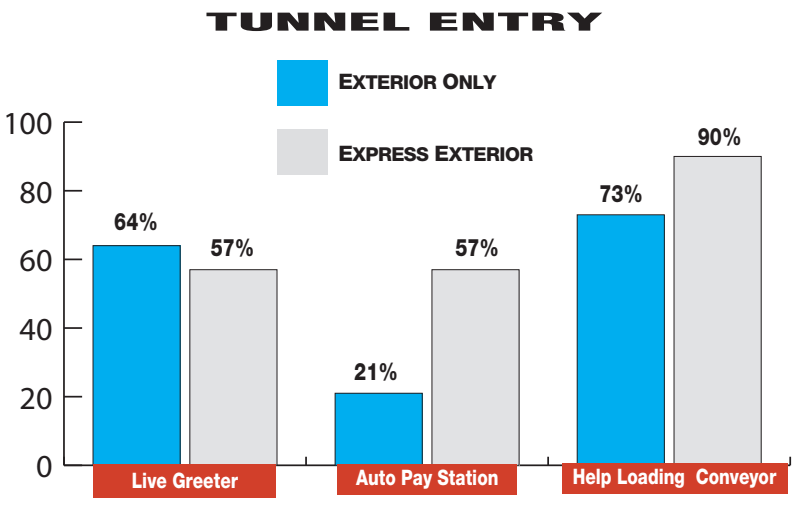
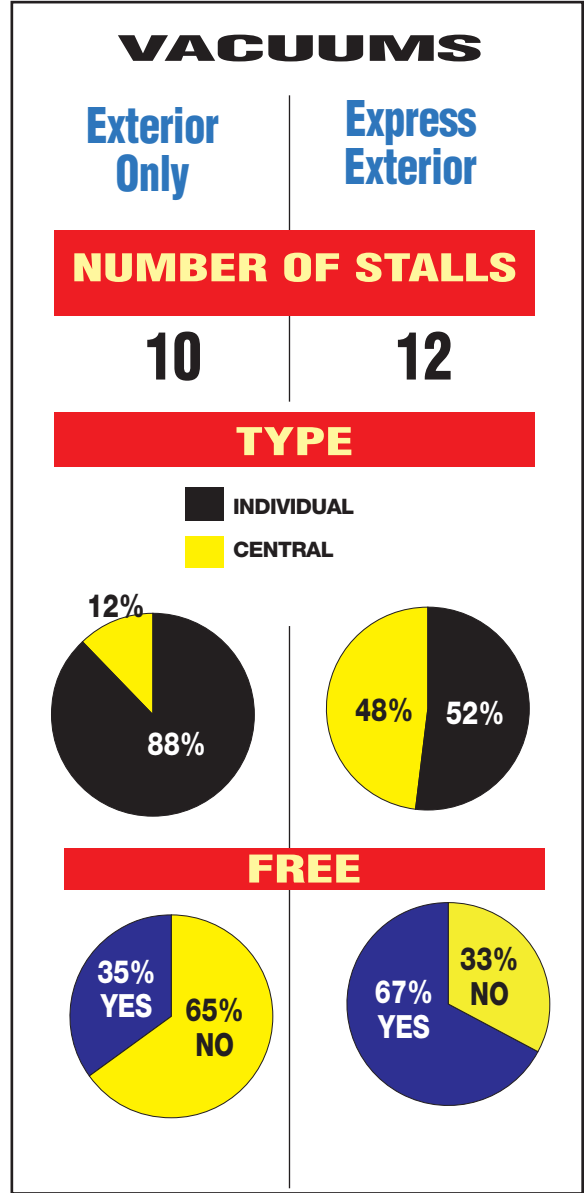
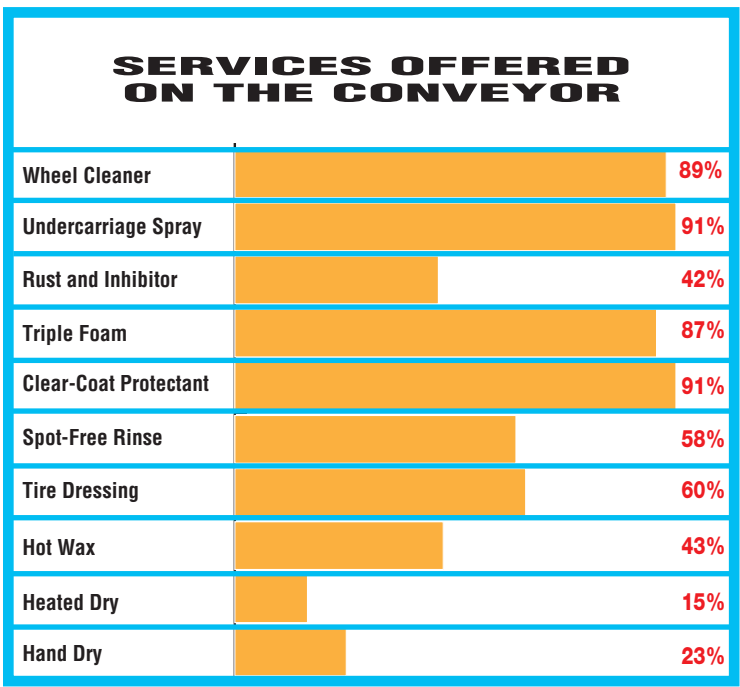
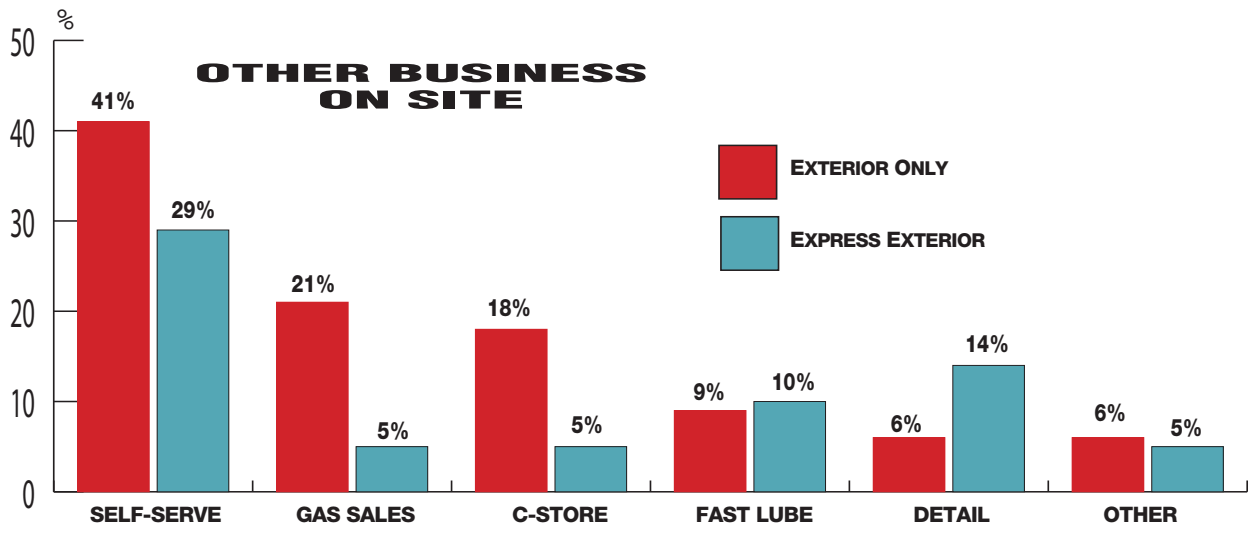
OPEN SUNDAY

Exterior Only	Express Exterior
97%	90%

OPEN 24 HOURS

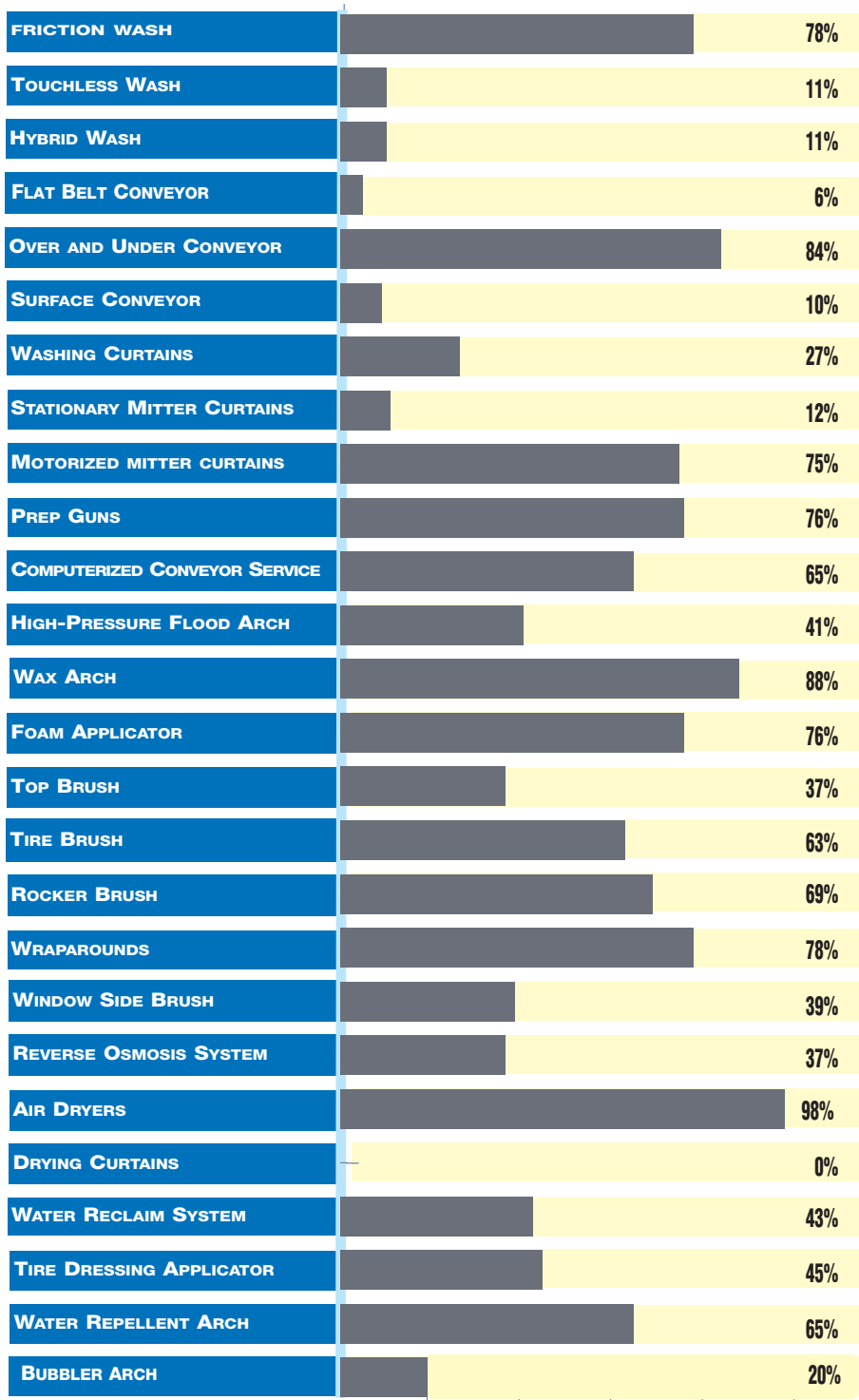
Exterior Only	Express Exterior
0%	4%

	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME	AVERAGE MONTHLY IMPULSE SALES
Exterior Only	36,600	64,840	\$219
Express Exterior	28,800	73,789	\$350

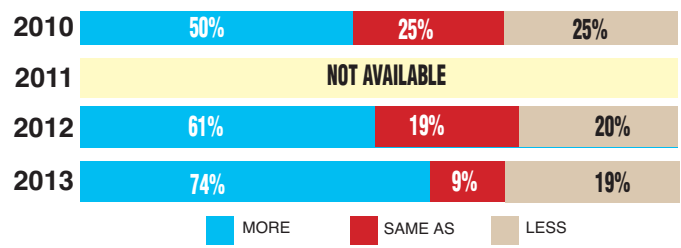


SURVEY

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



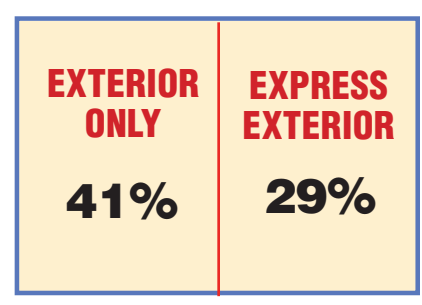
INCOME: CURRENT YEAR VS. PREVIOUS YEAR



AVERAGE TUNNEL LENGTH



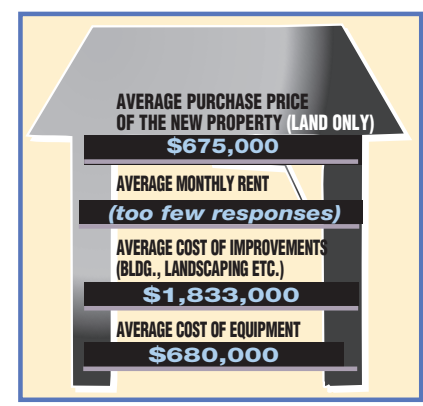
OPERATE COIN-OP BAYS ON SITE

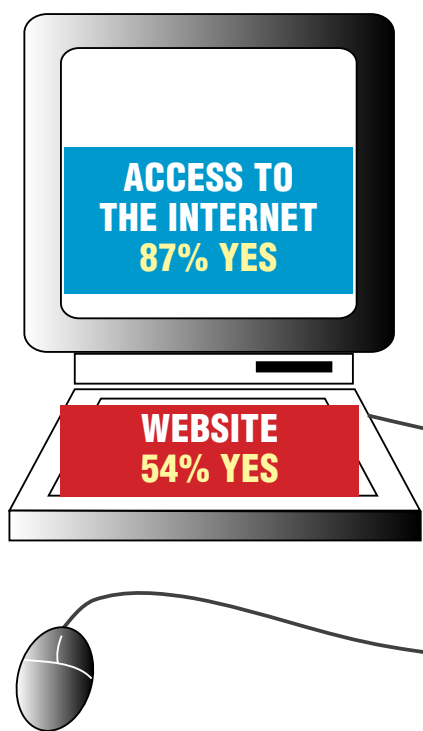
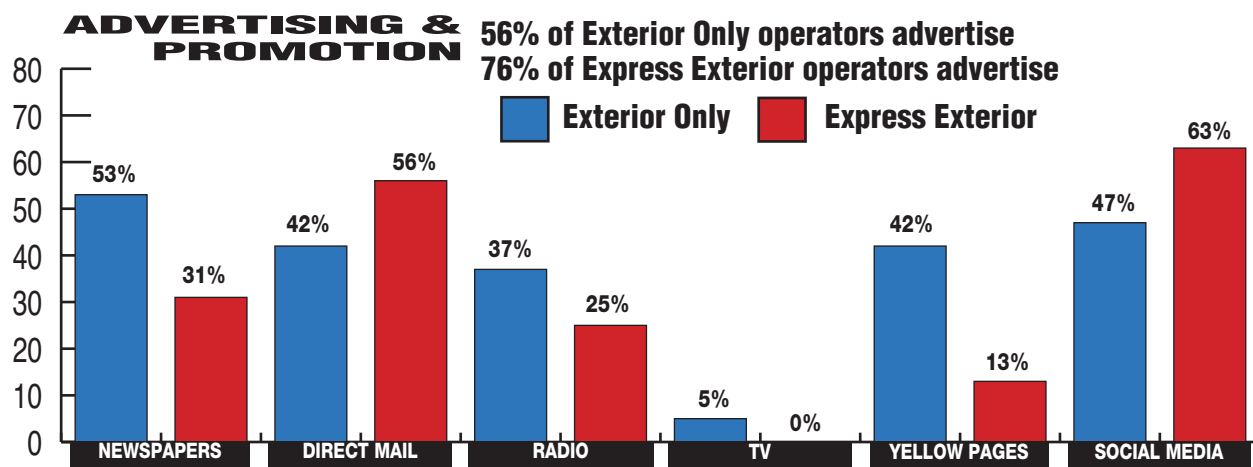


AVERAGE NUMBER OF BAYS



NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR

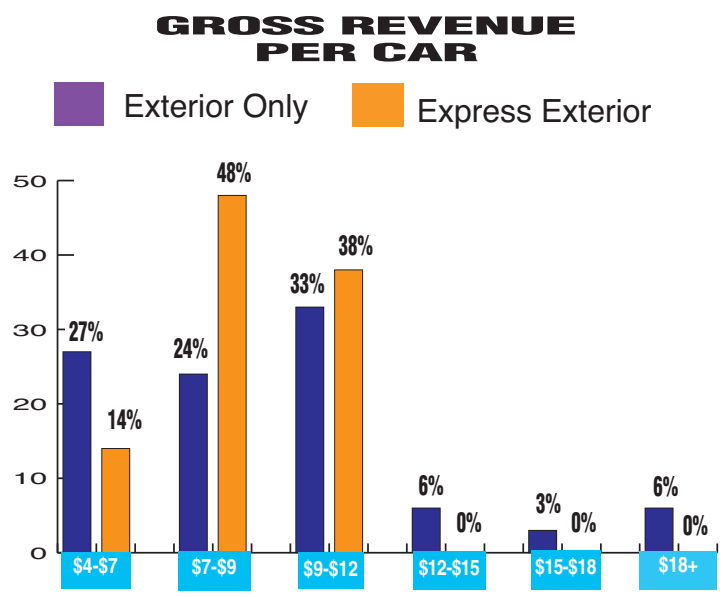




OPERATING COSTS

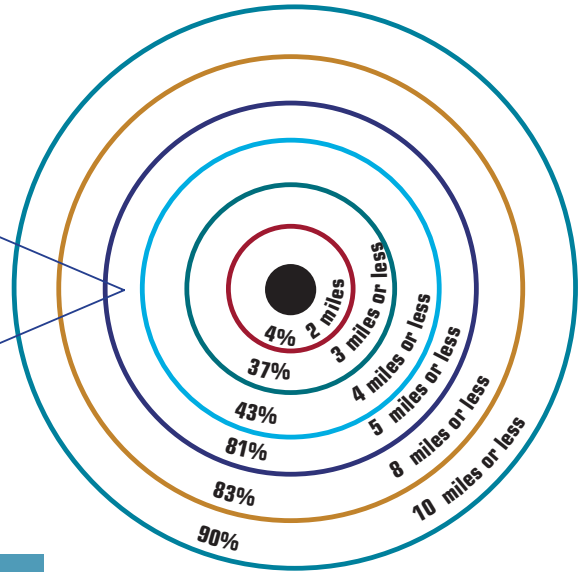
Exterior Only/Express Exterior Operating Costs
(AS A PERCENTAGE OF TOTAL REVENUES)

RENT		15.8%
EQUIPMENT & BLDG. MAINTENANCE		4.4%
CHEMICALS		7.0%
LABOR	Exterior Only: 27.6% Express Exterior: 15.3%	
UTILITIES		10.5%
INSURANCE		2.5%
ADVERTISING & PROMOTION		2.5%
EQUIPMENT ON LEASE		0%
CUSTOMER CLAIMS		0.8%

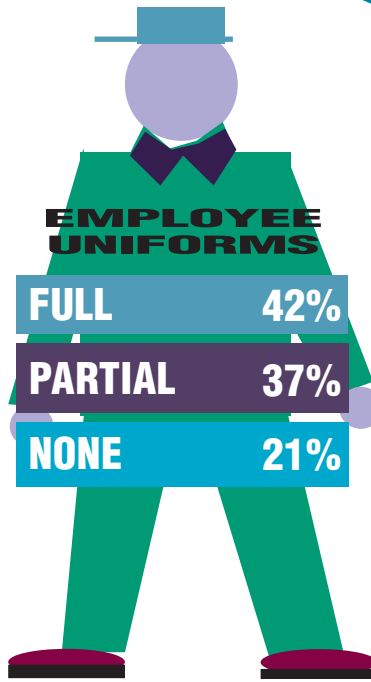
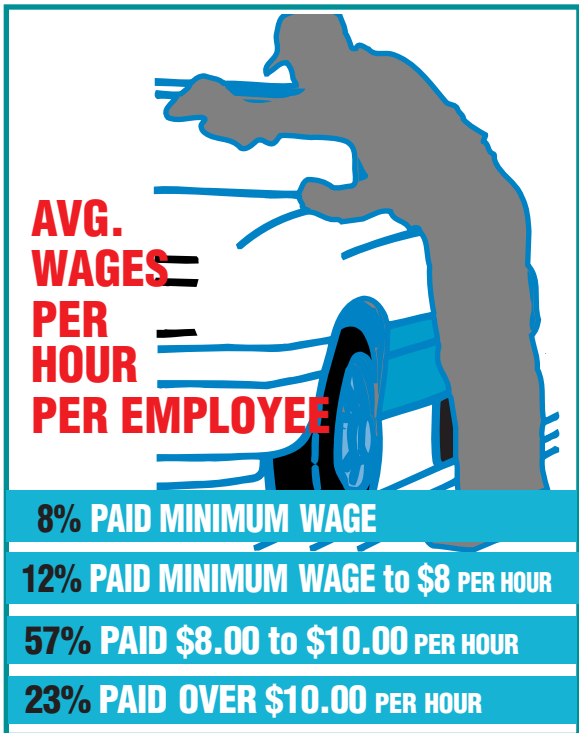


SURVEY

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



LABOR COSTS



OPERATORS SELLING GASOLINE

