

# Results From The Auto Laundry News 2017 Exterior Conveyor Survey

**T**he 2017 *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 43 percent of the total response, express-exterior sites account for 33 percent, and exteriors with off-line full service round out the total with 24 percent.

All respondents self-identify as belonging to one category or another. At best, many represent an approximation of the identity they have chosen. Less than half of express-exterior respondents, for example, report employing an automated pay station, an element regarded as essential to the format. Only 86 percent of these respondents offer free vacuums — another express-exterior basic — though this compares to the 33 percent of exterior-only participants who do the same.

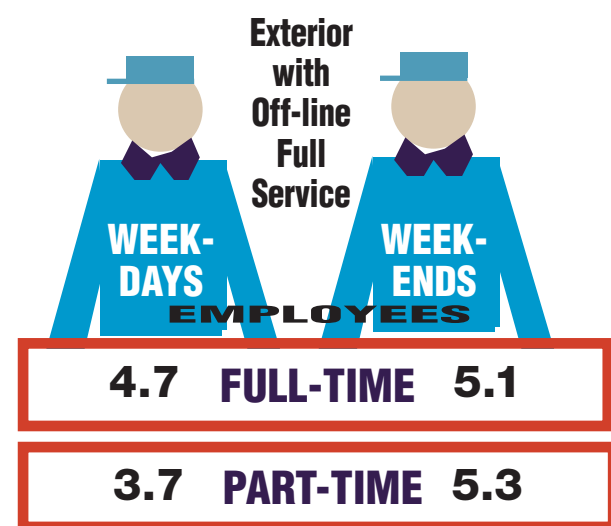
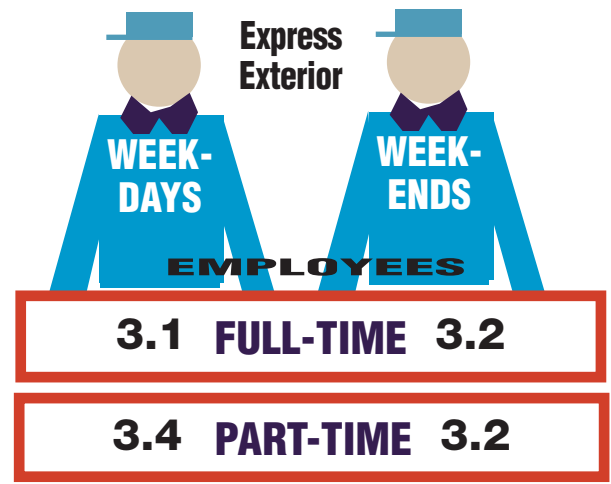
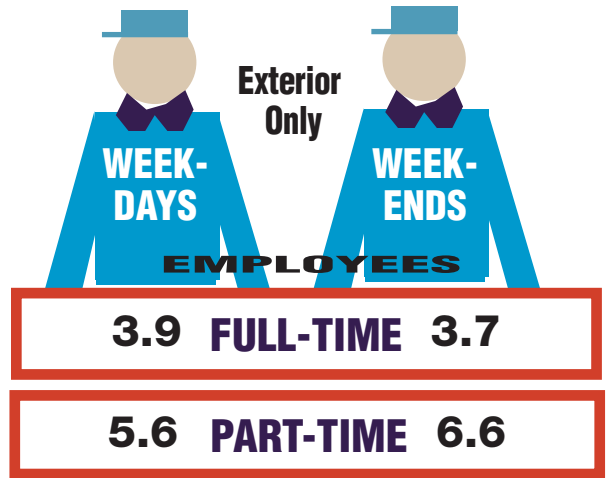
The vast majority of express-exteriors (83 percent) rely on a friction-only process; the remaining 17 percent have a hybrid system in place. At 68 percent, exterior-only operators are less likely to exclusively employ friction. Twenty-one percent of these respondents report having touch-free systems, while a further 11 percent opted for a hybrid process.

### Revenues

Overall, 43 percent of respondents report income growth over the previous year. The graphic on page 42 provides a three-year perspective. This is quite a drop from the 78 percent who made advances last year, but is largely attributable to declining progress reporters in the exterior-only (35 percent) and exterior sites with off-line full-serve (30 percent) categories. Seventy percent of express-exterior participants report growth; none reports declining revenue.

### Future

Twenty-two percent of exterior-only and 29 percent of express exterior respondents plan to build a new wash in the coming year — every one an express exterior. 📷



### COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	4%
1	29%
2	24%
3	24%
4	5%
5	7%
MORE THAN 5	7%

**PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION**

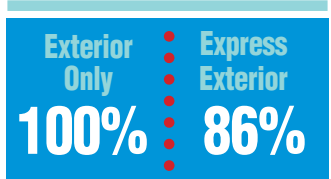
	MON	TUES	WED	THURS	FRI	SAT	SUN
<b>Pacific</b> Alaska-California-Hawaii-Oregon-Washington	*	*	*	*	*	*	*
<b>Mountain</b> Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	13	8	12	12	17	20	18
<b>Midwest</b> Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	13	10	10	10	17	23	17
<b>Central</b> Illinois-Indiana-Michigan-Ohio-Wisconsin	8	12	8	8	20	23	21
<b>South Central</b> Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	10	9	8	14	20	29	10
<b>Southeast</b> Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	12	10	10	12	15	22	20
<b>Mid-Atlantic</b> New Jersey-New York-Pennsylvania	12	9	9	10	19	26	15
<b>New England</b> Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	10	6	9	10	18	28	20

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

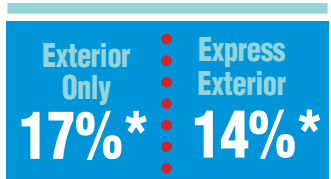
**PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION**

	WINTER	SPRING	SUMMER	FALL
<b>Pacific</b>	21	30	29	20
<b>Mountain</b>	33	25	22	20
<b>Midwest</b>	33	23	25	20
<b>Central</b>	46	21	18	15
<b>South Central</b>	29	26	22	22
<b>Southeast</b>	40	23	17	20
<b>Mid-Atlantic</b>	38	26	18	17
<b>New England</b>	33	30	20	18

**OPEN SUNDAY**



**OPEN 24 HOURS**



\* Wand self-serve bays only

**AVERAGE DAILY TRAFFIC COUNT**

**AVERAGE ANNUAL WASH VOLUME**

**AVERAGE MONTHLY IMPULSE SALES**

**Exterior Only**

**34,100**

**62,400**

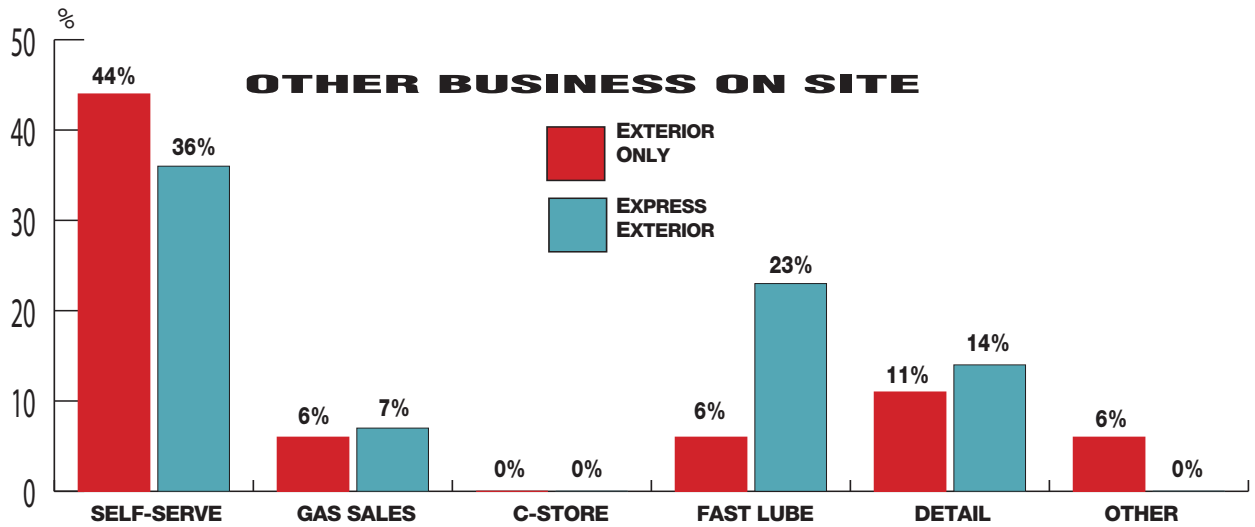
**\$300**

**Express Exterior**

**34,600**

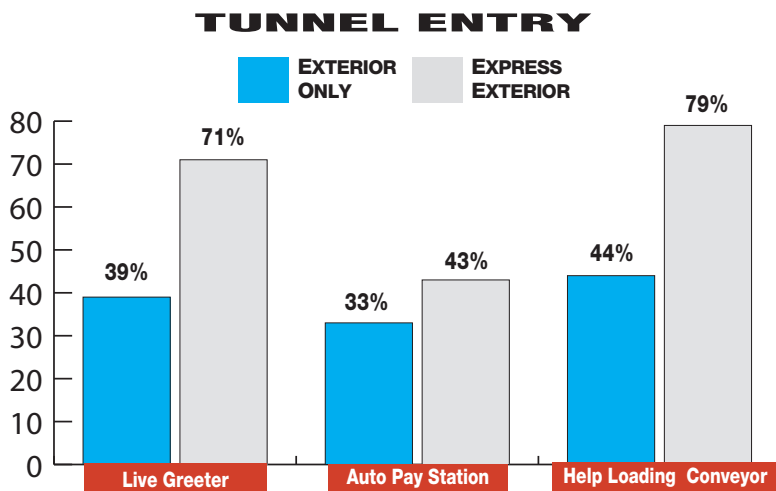
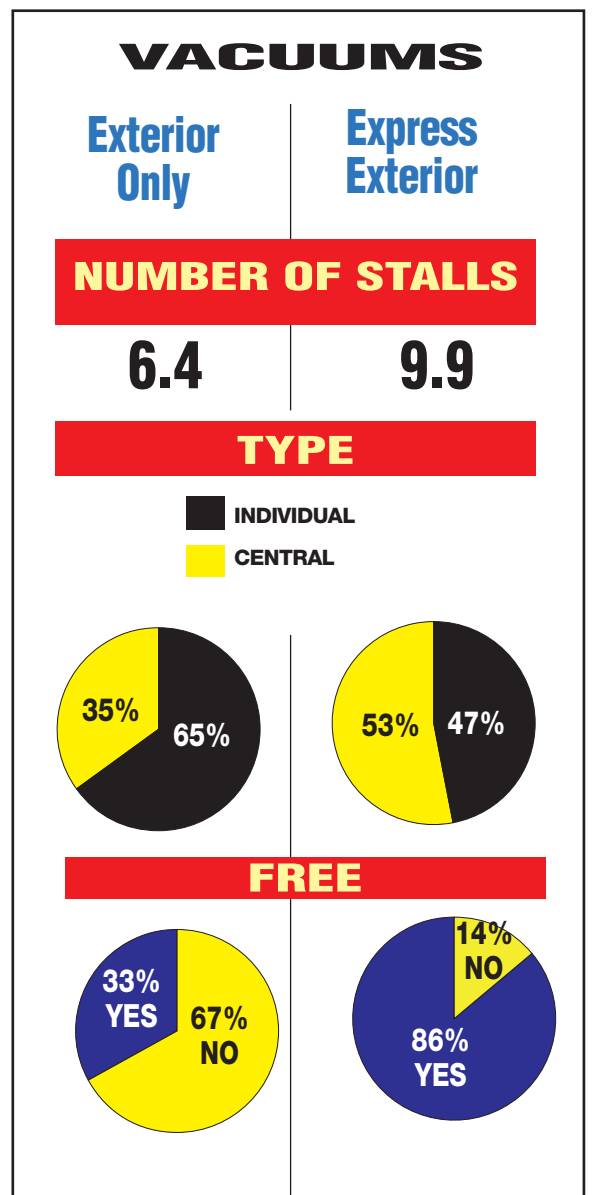
**90,900**

**\$293**



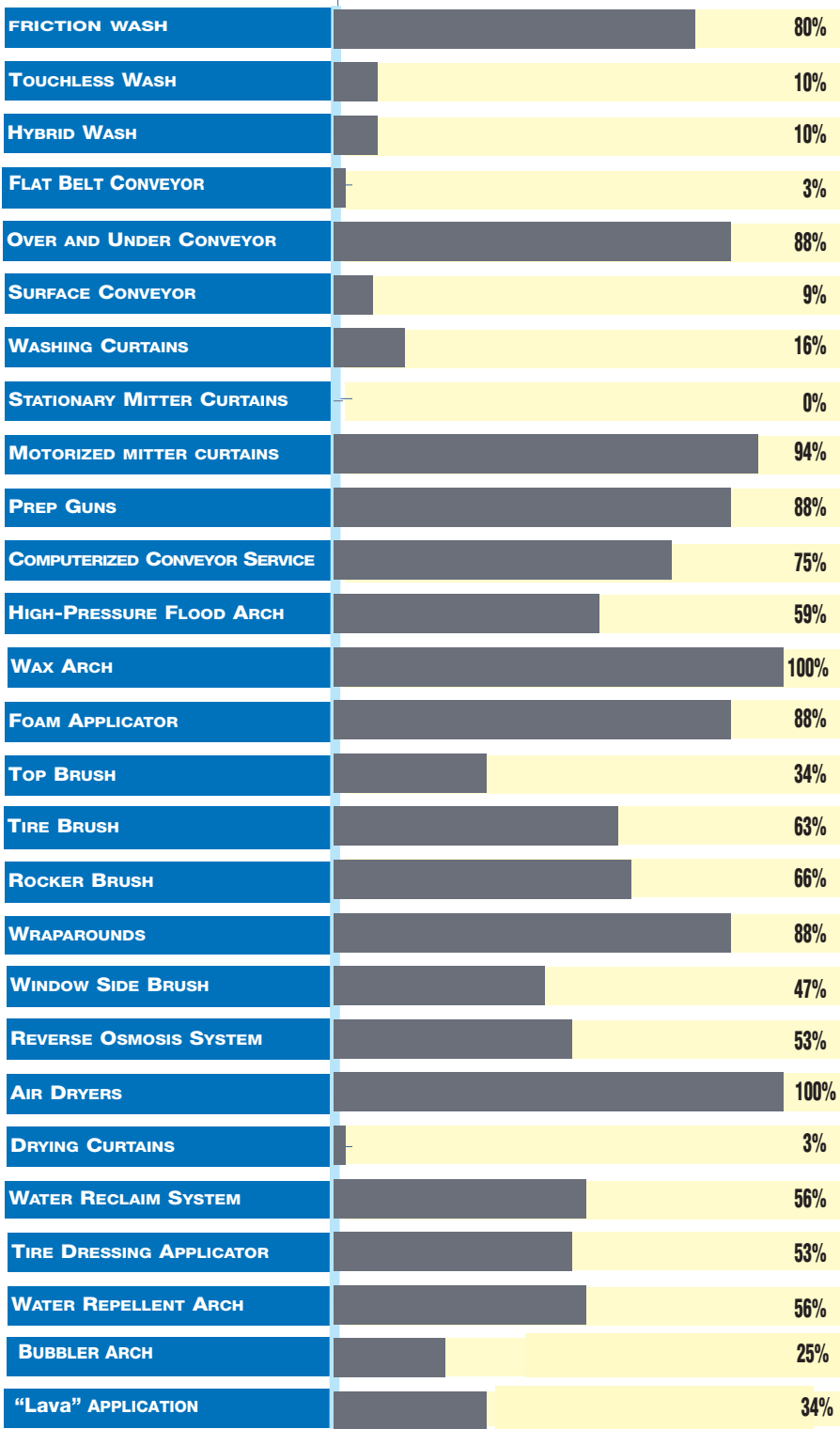
### SERVICES OFFERED ON THE CONVEYOR

Wheel Cleaner	87%
Undercarriage Spray	74%
Rust and Inhibitor	36%
Triple Foam	72%
Clear-Coat Protectant	79%
Spot-Free Rinse	74%
Tire Dressing	59%
Hot Wax	67%
Heated Dry	13%
Hand Dry	26%

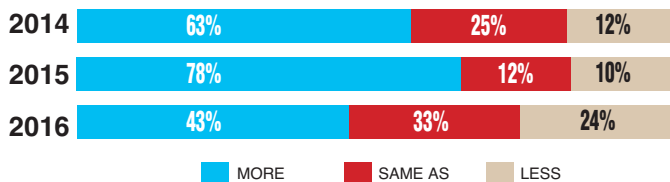


# SURVEY

## PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



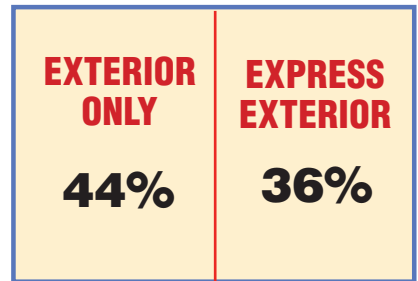
## INCOME: CURRENT YEAR VS. PREVIOUS YEAR



## AVERAGE TUNNEL LENGTH



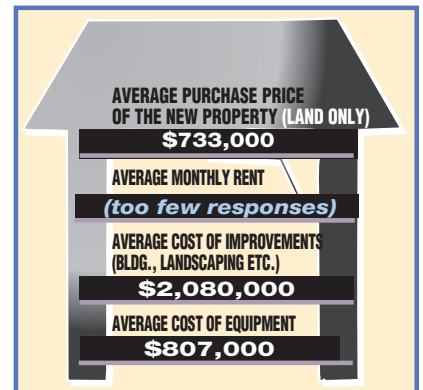
## OPERATE COIN-OP BAYS ON SITE



## AVERAGE NUMBER OF BAYS

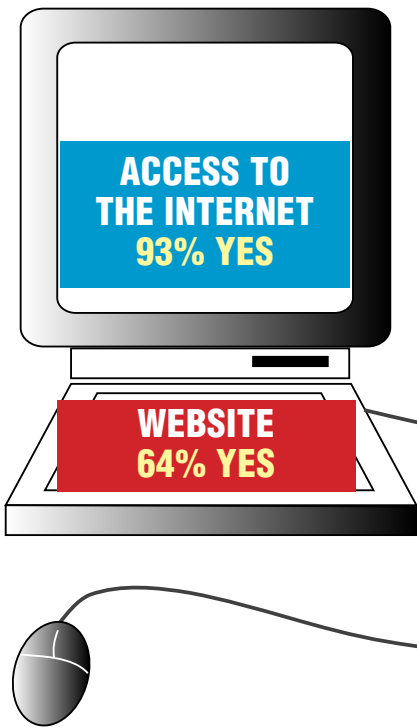
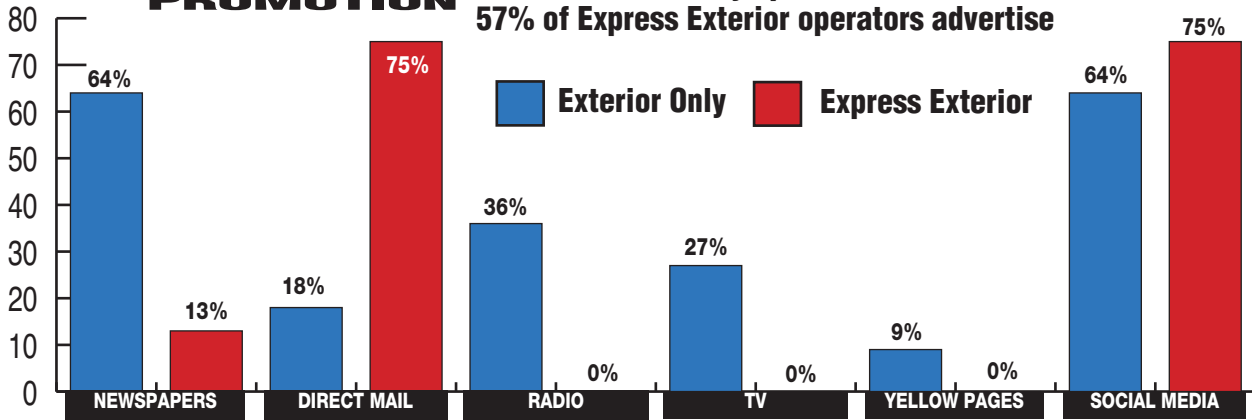


## NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR



## ADVERTISING & PROMOTION

61% of Exterior Only operators advertise  
57% of Express Exterior operators advertise



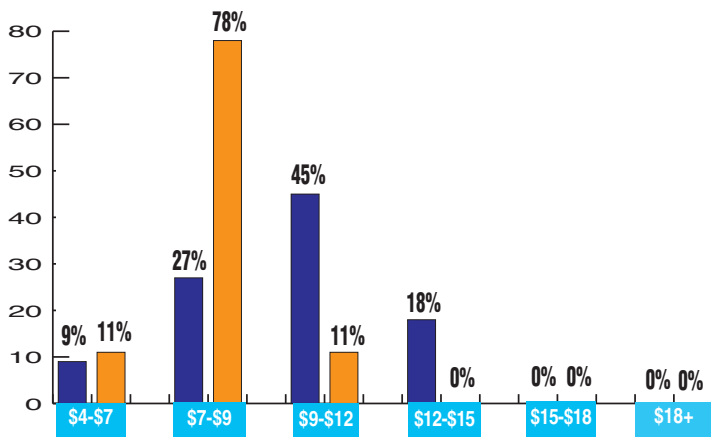
## OPERATING COSTS

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

Category	Exterior Only (%)	Express Exterior (%)
RENT	13.9%	
EQUIPMENT & BLDG. MAINTENANCE	5.4%	
CHEMICALS	8.4%	
LABOR	27.8%	16.8%
UTILITIES	9.2%	
INSURANCE	3.2%	
ADVERTISING & PROMOTION	1.8%	
EQUIPMENT ON LEASE	2.5%	
CUSTOMER CLAIMS	0.8%	

## GROSS REVENUE PER CAR

Exterior Only (Purple) Express Exterior (Orange)

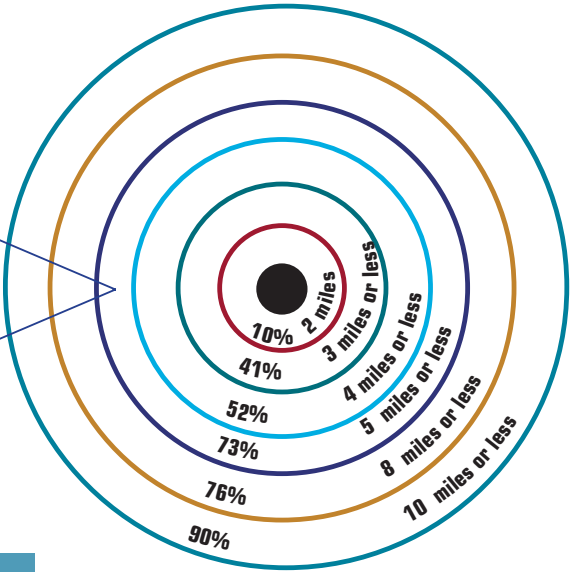


## AVERAGE GROSS REVENUE PER CAR

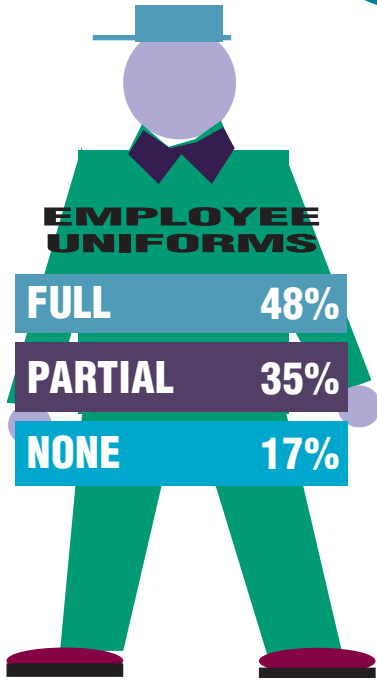


**SURVEY**

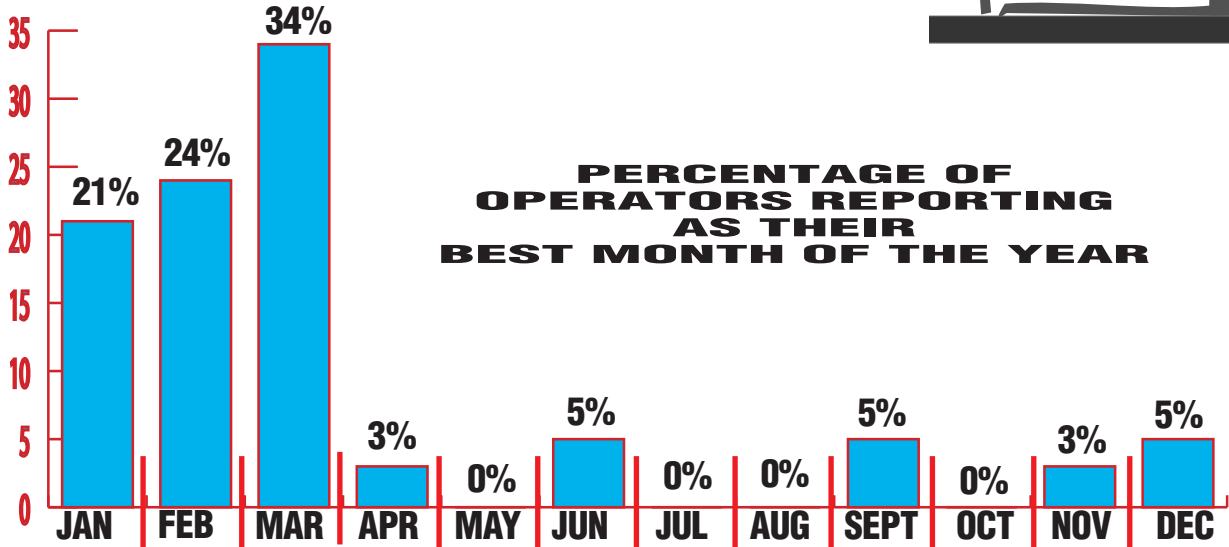
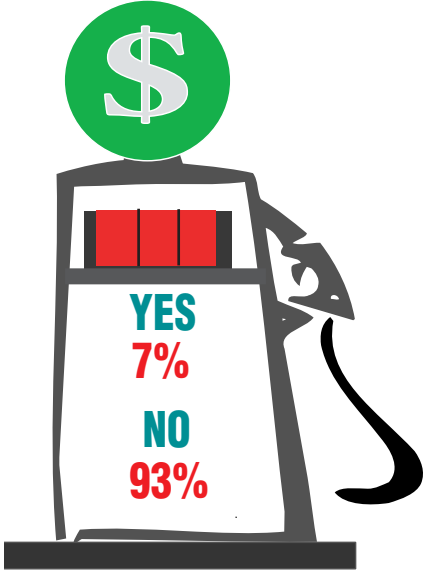
**HOW FAR DO CUSTOMERS COME?**  
(Percent from within 2-mile radius, 3-mile radius, etc.)



**LABOR COSTS**



**OPERATORS SELLING GASOLINE**



**PERCENTAGE OF OPERATORS REPORTING AS THEIR BEST MONTH OF THE YEAR**