

*Results from the
Auto Laundry News*

2017 Exterior Conveyor Survey

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The 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

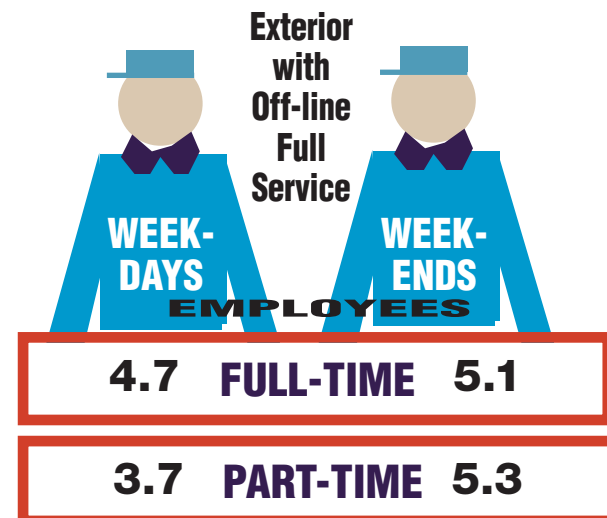
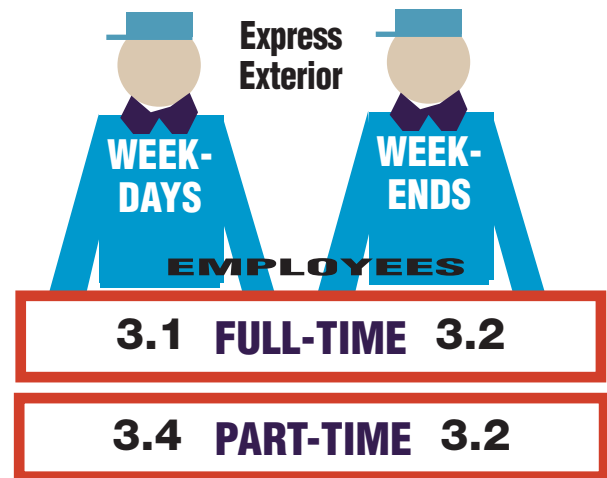
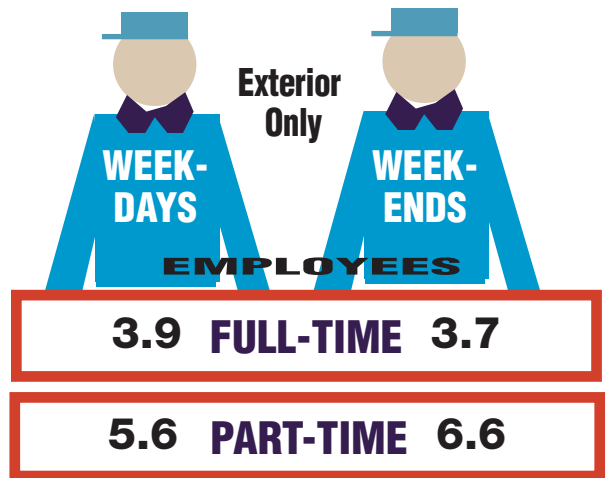
Overall, 43 percent of respondents report income growth over the previous year. The graphic on page 42 provides a three-year perspective. This is quite a drop from the 78 percent who made advances last year, but is largely attributable to declining progress reporters in the exterior-only (35 percent) 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
Pacific Alaska-California-Hawaii-Oregon-Washington	*	*	*	*	*	*	*
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	13	8	12	12	17	20	18
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	13	10	10	10	17	23	17
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	8	12	8	8	20	23	21
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	10	9	8	14	20	29	10
Southeast Delaware-Florida-Georgia-Maryland-Carolinas-Virginia-West Virginia	12	10	10	12	15	22	20
Mid-Atlantic New Jersey-New York-Pennsylvania	12	9	9	10	19	26	15
New England 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
Pacific	21	30	29	20
Mountain	33	25	22	20
Midwest	33	23	25	20
Central	46	21	18	15
South Central	29	26	22	22
Southeast	40	23	17	20
Mid-Atlantic	38	26	18	17
New England	33	30	20	18

OPEN SUNDAY

Exterior Only	Express Exterior
100%	86%

OPEN 24 HOURS

Exterior Only	Express Exterior
17%*	14%*

* Wand self-serve bays only

AVERAGE DAILY TRAFFIC COUNT

AVERAGE ANNUAL WASH VOLUME

AVERAGE MONTHLY IMPULSE SALES

Exterior Only

34,100

62,400

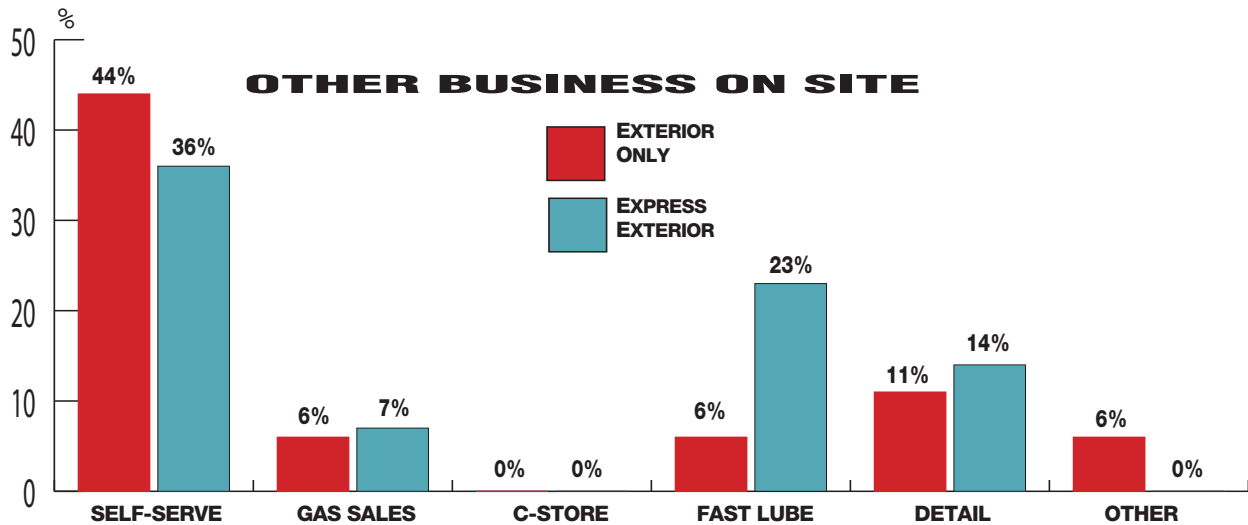
\$300

Express Exterior

34,600

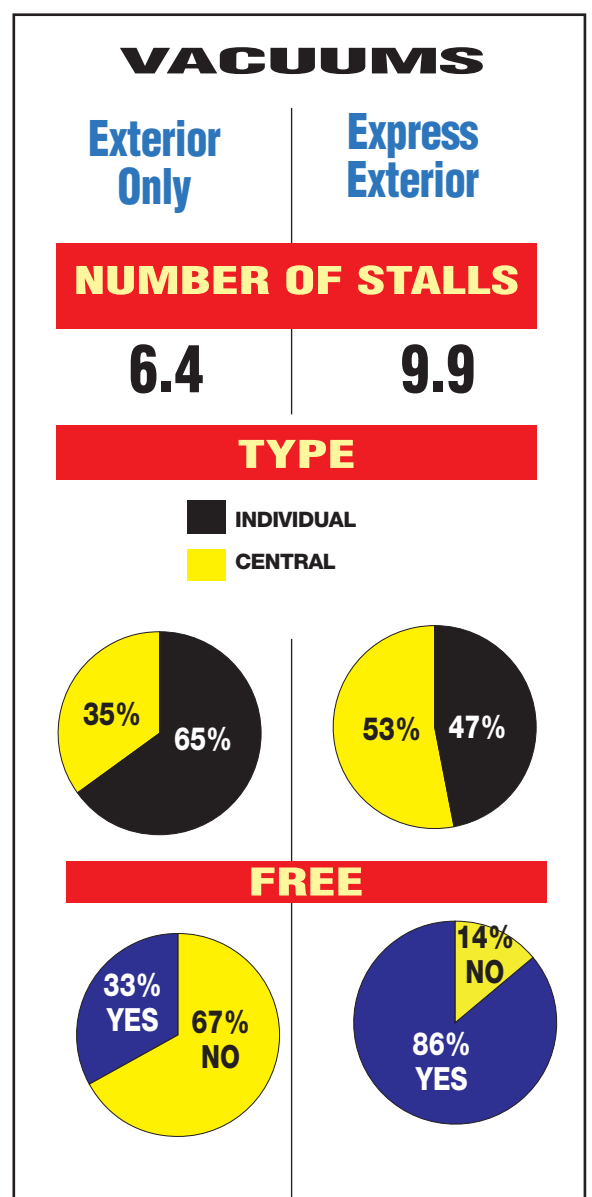
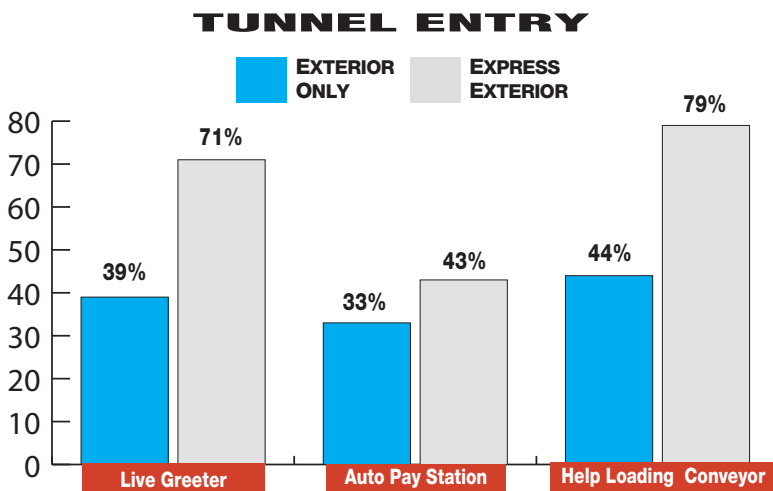
90,900

\$293



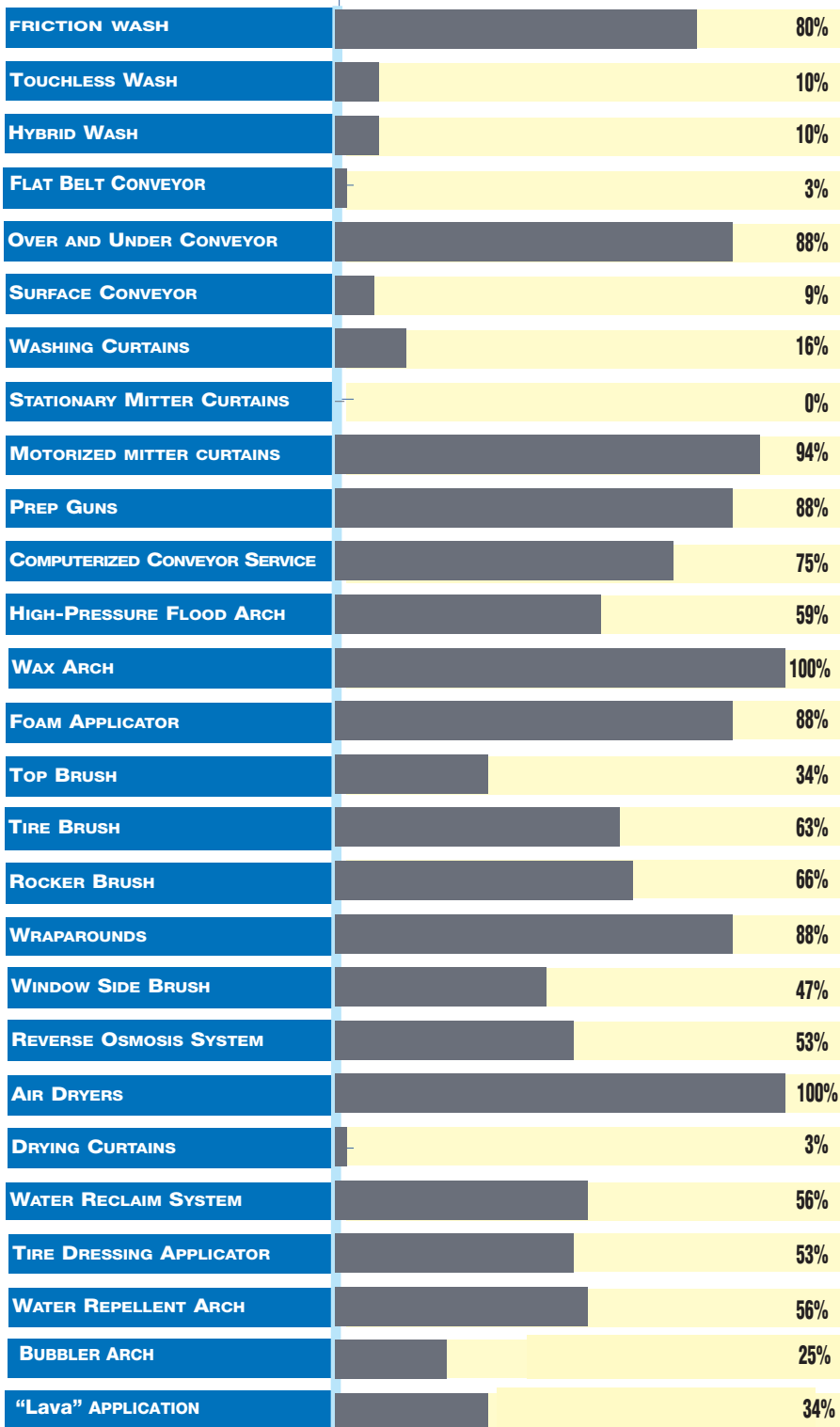
SERVICES OFFERED ON THE CONVEYOR

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%

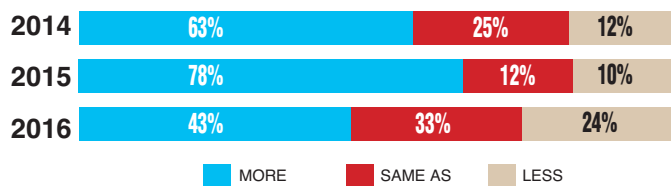


SURVEY

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



INCOME: CURRENT YEAR VS. PREVIOUS YEAR



AVERAGE TUNNEL LENGTH

EXTERIOR ONLY

105 FEET

EXPRESS EXTERIOR

99 FEET

OPERATE COIN-OP BAYS ON SITE

EXTERIOR ONLY

44%

EXPRESS EXTERIOR

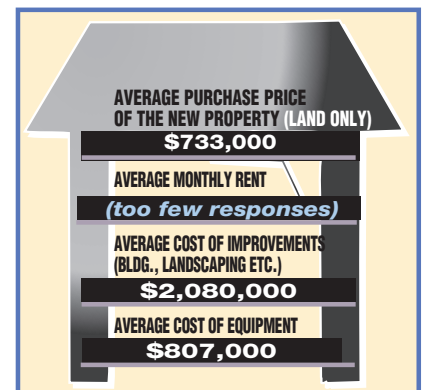
36%

AVERAGE NUMBER OF BAYS

5.1

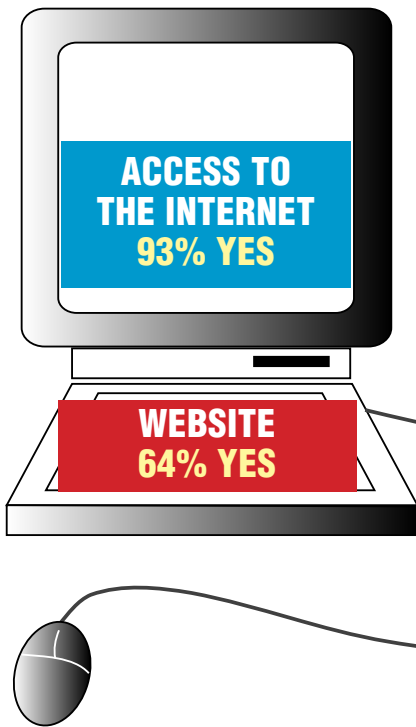
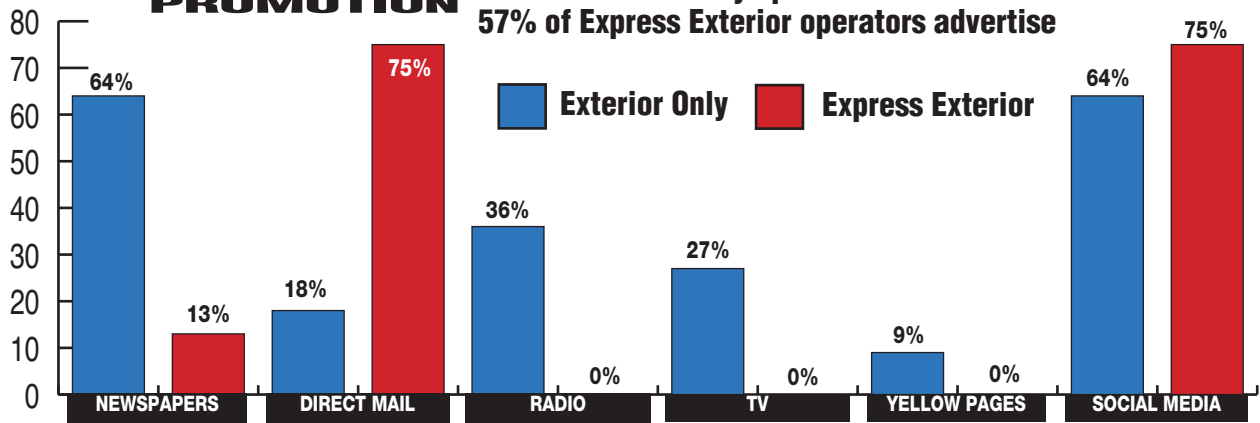
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NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR



ADVERTISING & PROMOTION

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



OPERATING COSTS

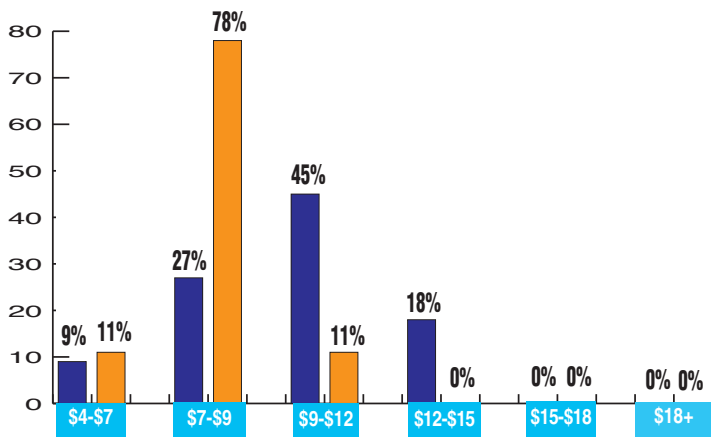
Exterior Only/Express Exterior Operating Costs

(AS A PERCENTAGE OF TOTAL REVENUES)

RENT		13.9%
EQUIPMENT & BLDG. MAINTENANCE		5.4%
CHEMICALS		8.4%
LABOR	Exterior Only Express Exterior	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 Express Exterior

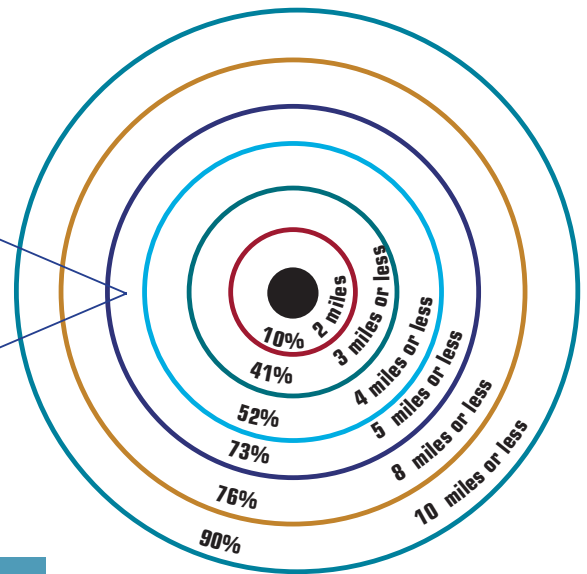


AVERAGE GROSS REVENUE PER CAR

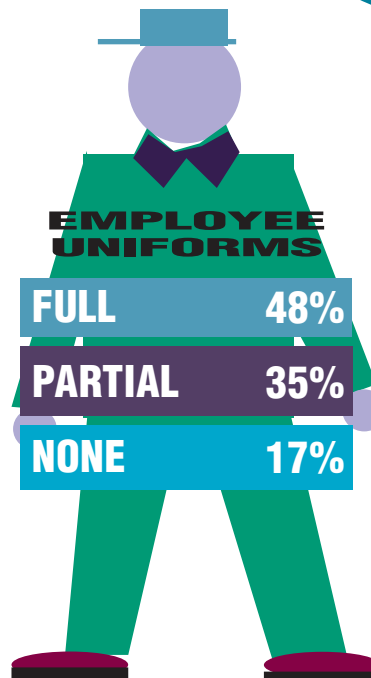
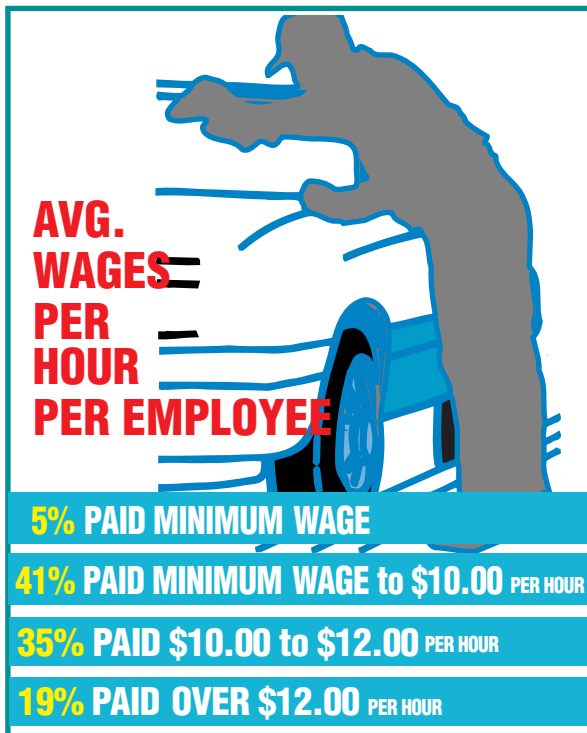


SURVEY

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



LABOR COSTS



OPERATORS SELLING GASOLINE

