

# AutoLaundry<sup>news</sup>

# Results From The Auto Laundry News 2020 Exterior Conveyor Survey

**T**he 2020 *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 36 percent of the total response, express-exterior sites account for 52 percent, and exteriors with off-line full service round out the total with 12 percent. This closely tracks last year's results when the split was 35/55/10.

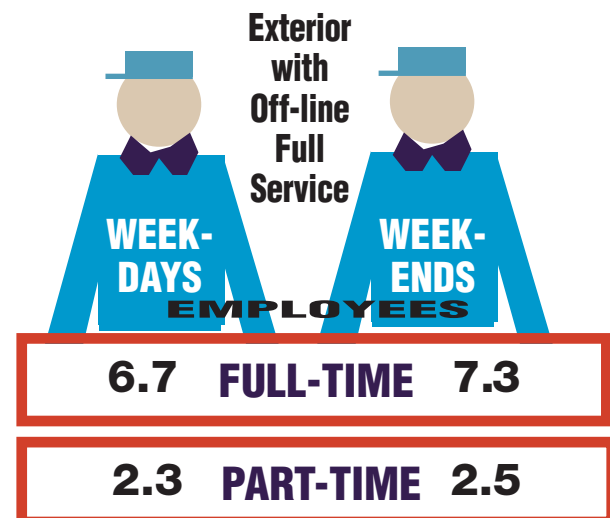
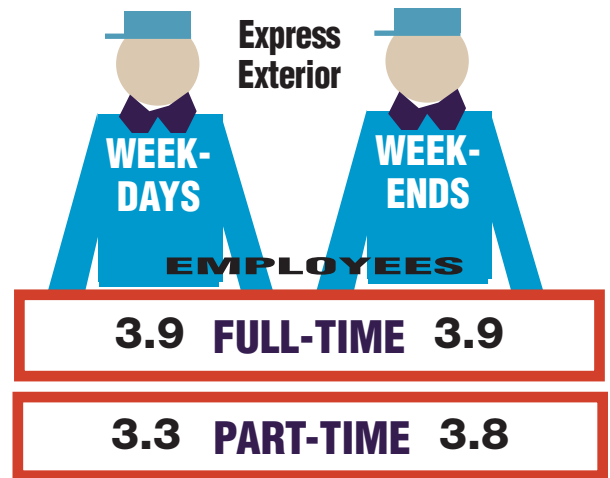
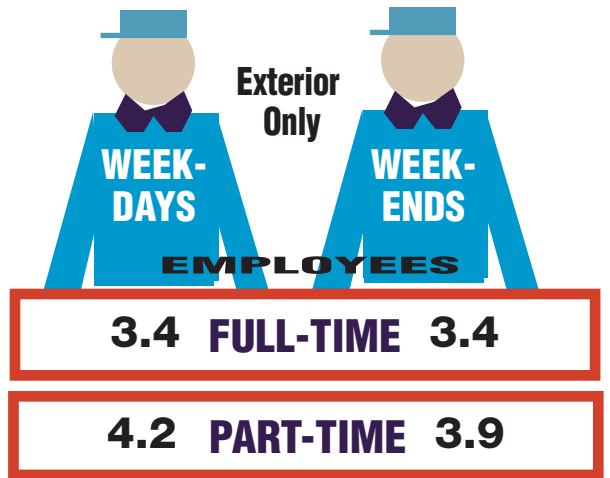
All respondents self-identify as belonging to one category or another and, as in the past, there is some confusion as to what constitutes an exterior-only wash as opposed to an express-exterior wash. Exterior-only locations are in some instances co-opting services — such as free self-vacuuming and auto pay stations — once thought to define the express format.

While 100 percent of respondents in both categories accept cash and credit card payments, at 29 percent, express-exterior sites are more than three times as likely as exterior-only washes (at 9 percent) to accept payment by mobile device.

In the express-exterior category, 94 percent of respondents report operating an unlimited monthly wash club with an average age of 5.3 years and membership averaging 3,846. Exterior-only sites came a little late to the party: their clubs have been in existence for an average 3.4 years, and only 42 percent of respondents report offering such memberships with a 204 average.

### Revenues

Overall, 47 percent of respondents report income growth over the previous year, a significant step down from 57 percent last year, which was itself a retreat from 63 percent the year before that (the graphic on page 35 provides a four-year perspective). This reversal is attributed to performance at exterior-only sites, only 20 percent of which reported income growth. By comparison, 59 percent of express-exterior locations did so.



### COMPETING CONVEYOR WASHES IN AREA

NUMBER OF COMPETITORS	OPERATORS REPORTING
0	3%
1	19%
2	28%
3	17%
4	17%
5	11%
MORE THAN 5	6%

# SURVEY

## 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	12	10	12	23	19	13
<b>Midwest</b> Iowa-Kansas-Minnesota-Missouri-Nebraska- North Dakota-South Dakota	14	8	10	13	18	20	18
<b>Central</b> Illinois-Indiana-Michigan-Ohio-Wisconsin	12	10	12	18	17	22	15
<b>South Central</b> Alabama-Arkansas-Kentucky-Louisiana- Mississippi-Oklahoma-Tennessee-Texas	12	10	9	10	20	21	18
<b>Southeast</b> Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	8	13	10	13	18	25	13
<b>Mid-Atlantic</b> New Jersey-New York-Pennsylvania	11	9	11	11	16	21	21
<b>New England</b> Connecticut-Maine-Massachusetts- New Hampshire-Rhode Island-Vermont	11	8	7	11	18	29	18

\* 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>	*	*	*	*
<b>Mountain</b>	20	26	32	23
<b>Midwest</b>	30	23	28	20
<b>Central</b>	39	24	18	19
<b>South Central</b>	24	26	23	26
<b>Southeast</b>	28	31	20	21
<b>Mid-Atlantic</b>	33	25	18	23
<b>New England</b>	48	24	15	14

\* Too Few Responses

## OPEN SUNDAY

Exterior Only: 92%  
Express Exterior: 88%

## OPEN 24 HOURS

Exterior Only: 33%\*  
Express Exterior: 35%\*

\* Wand self-serve bays only

**AVERAGE DAILY TRAFFIC COUNT**

**AVERAGE ANNUAL WASH VOLUME**

**AVERAGE GROSS REVENUE PER CAR**

**Exterior Only**

**23,200**

**55,600**

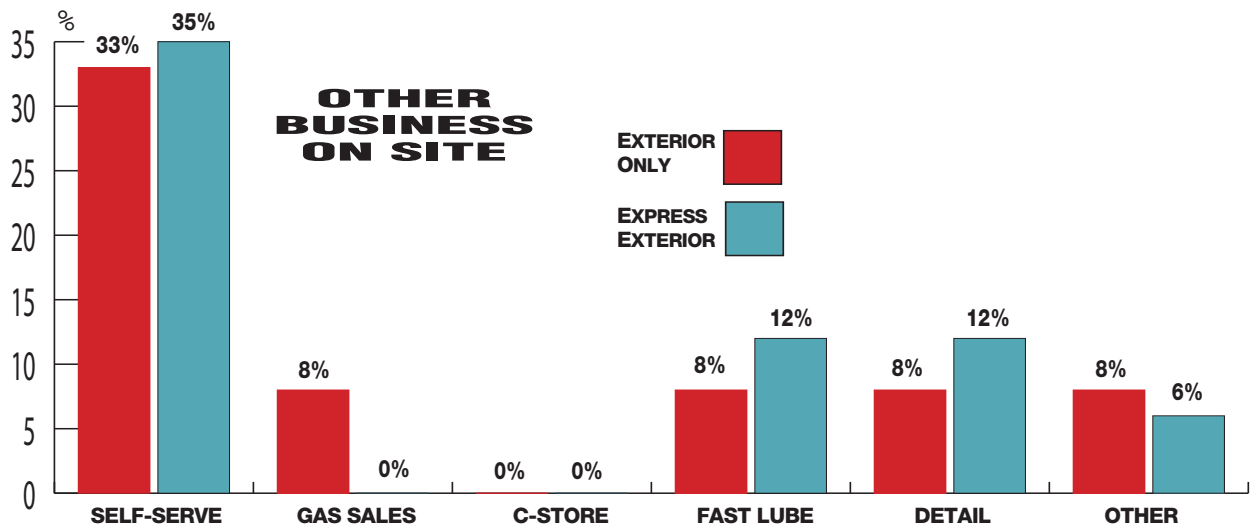
**\$9.39**

**Express Exterior**

**32,400**

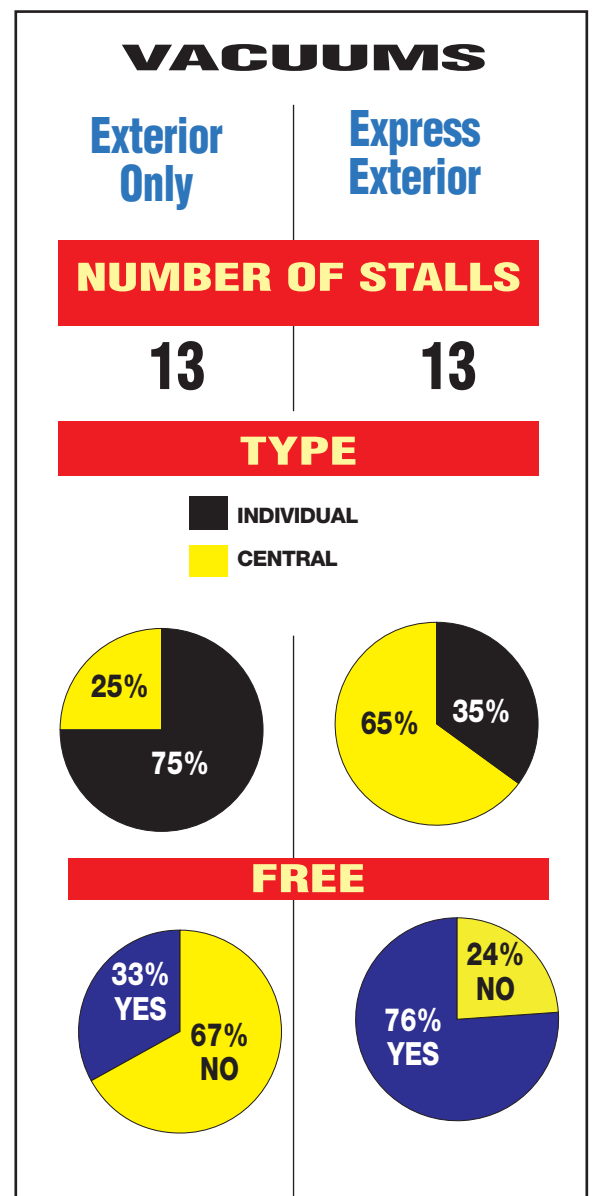
**121,600**

**\$10.07**

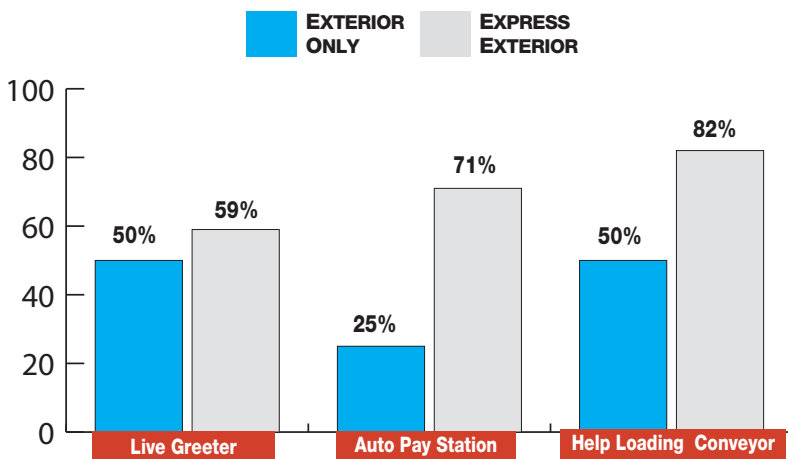


### SERVICES OFFERED ON THE CONVEYOR

Wheel Cleaner	94%
Undercarriage Spray	85%
Rust and Inhibitor	45%
Triple Foam	82%
Clear-Coat Protectant	85%
Spot-Free Rinse	70%
Tire Dressing	58%
Hot Wax	70%
Heated Dry	18%
Hand Dry	18%



### TUNNEL ENTRY



# SURVEY

## PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

FRICTION WASH	69%
TOUCHLESS WASH	11%
HYBRID WASH	19%
FLAT BELT CONVEYOR	17%
OVER AND UNDER CONVEYOR	83%
SURFACE CONVEYOR	0%
WASHING CURTAINS	13%
STATIONARY MITTER CURTAINS	13%
MOTORIZED MITTER CURTAINS	78%
PREP GUNS	70%
COMPUTERIZED CONVEYOR SERVICE	65%
HIGH-PRESSURE FLOOD ARCH	65%
WAX ARCH	100%
FOAM APPLICATOR	100%
TOP BRUSH	70%
TIRE BRUSH	61%
ROCKER BRUSH	83%
WRAPAROUNDS	91%
WINDOW SIDE BRUSH	43%
REVERSE OSMOSIS SYSTEM	52%
AIR DRYERS	100%
DRYING CURTAINS	9%
WATER RECLAIM SYSTEM	61%
TIRE DRESSING APPLICATOR	65%
WATER REPELLENT ARCH	96%
BUBBLER ARCH	35%
"Lava" APPLICATION	61%
FRICTION DRYING SYSTEM	4%
LED LIGHTING	87%
DIGITAL MENU/SIGNAGE	26%
PAINT SEALANT	52%

## AVERAGE TUNNEL LENGTH

**EXTERIOR ONLY**

**98 FEET**

**EXPRESS EXTERIOR**

**116 FEET**

## OPERATE COIN-OP BAYS ON SITE

**EXTERIOR ONLY**

**33%**

**EXPRESS EXTERIOR**

**35%**

## AVERAGE NUMBER OF BAYS

**4.5**

**4.8**

## NEW EXTERIOR WASH BUILT WITHIN THE PAST YEAR

AVERAGE PURCHASE PRICE OF THE NEW PROPERTY (LAND ONLY)

**\$650,000**

AVERAGE MONTHLY RENT

*(too few responses)*

AVERAGE COST OF IMPROVEMENTS (BLDG., LANDSCAPING ETC.)

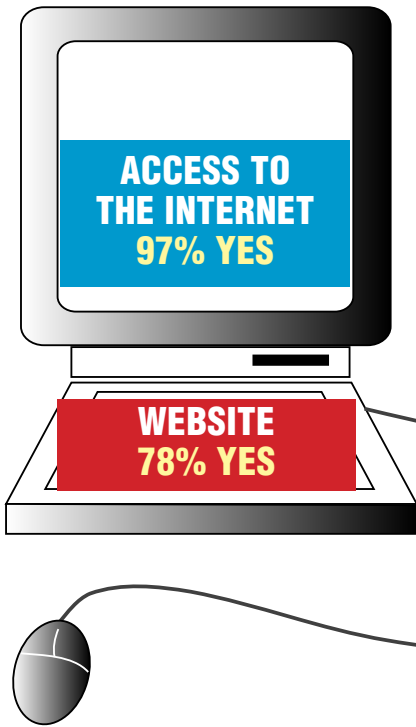
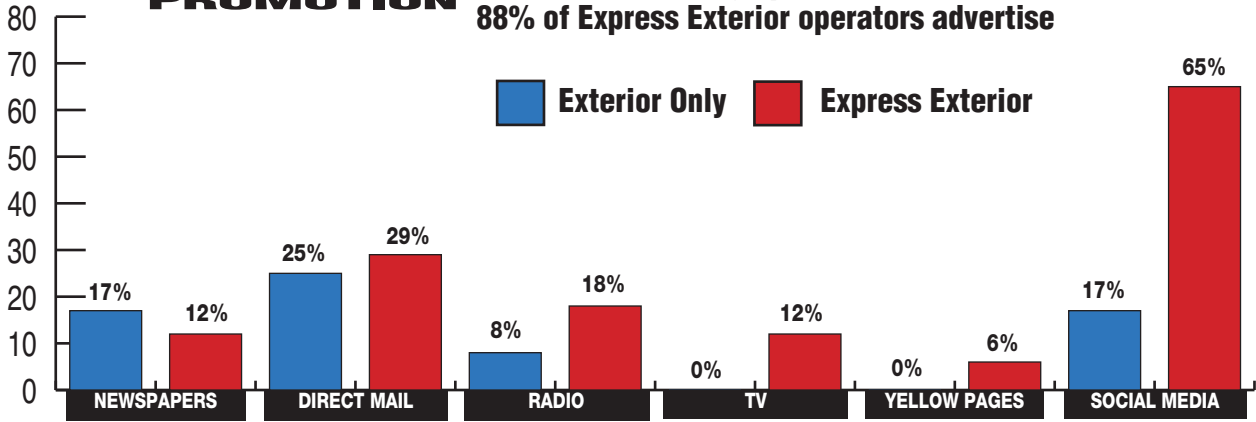
**\$2,400,000**

AVERAGE COST OF EQUIPMENT

**\$881,000**

## ADVERTISING & PROMOTION

42% of Exterior Only operators advertise  
88% of Express Exterior operators advertise



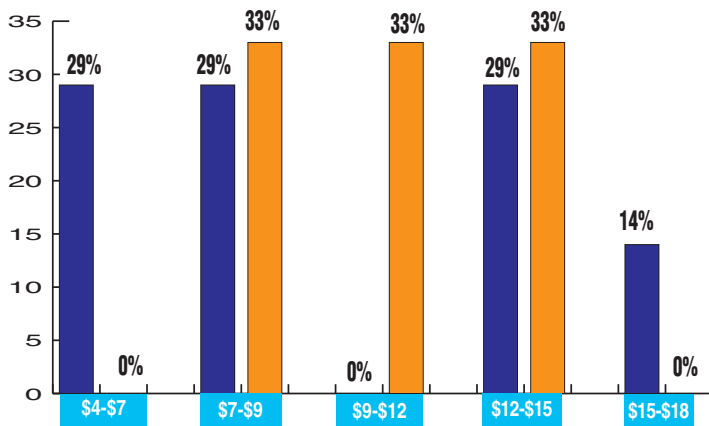
## OPERATING COSTS

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

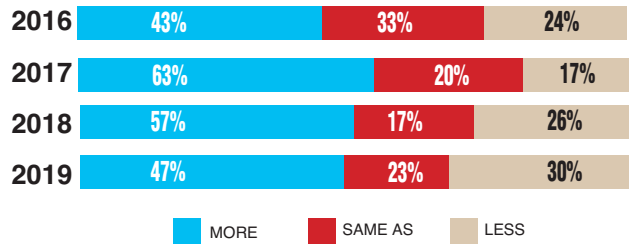
Category	Exterior Only (%)	Express Exterior (%)
RENT	13.3%	
EQUIPMENT & BLDG. MAINTENANCE	4.5%	
CHEMICALS	5.7%	
LABOR	18.5%	20.6%
UTILITIES	8.8%	
INSURANCE	1.9%	
ADVERTISING & PROMOTION	1.2%	
EQUIPMENT ON LEASE	0%	
CUSTOMER CLAIMS	0.8%	

## GROSS REVENUE PER CAR

Exterior Only  
Express Exterior

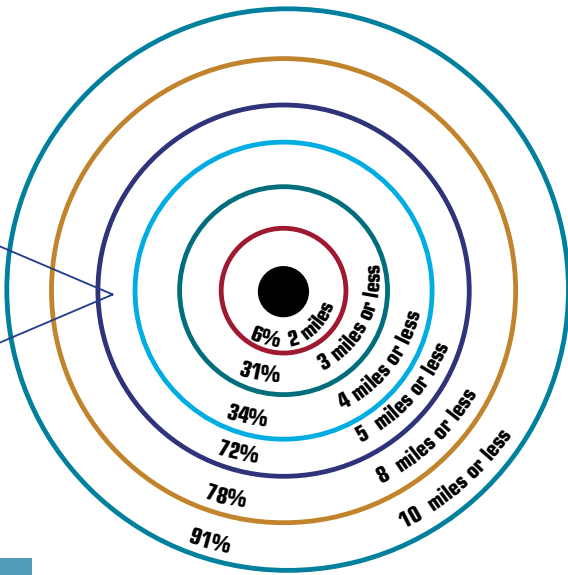


## INCOME: CURRENT YEAR VS. PREVIOUS YEAR

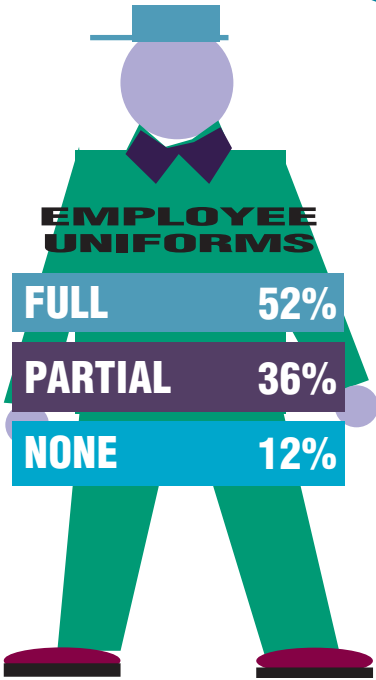
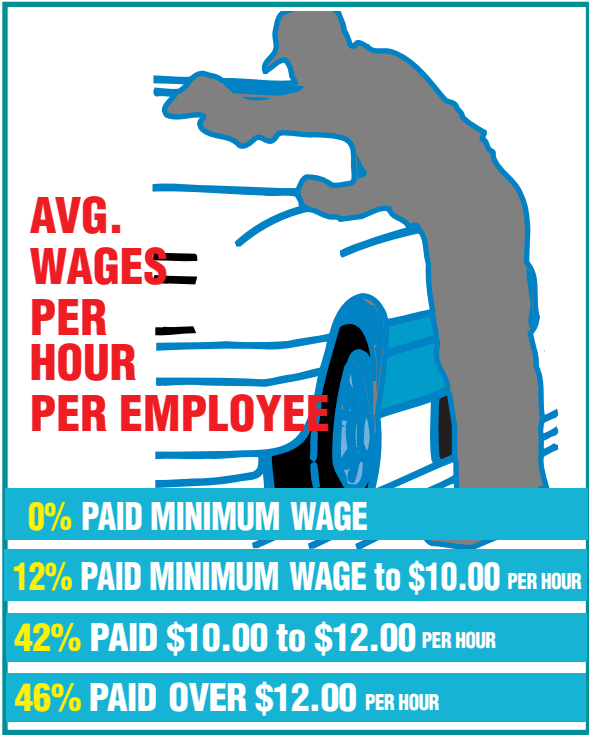


**SURVEY**

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



**LABOR COSTS**



**OPERATORS SELLING GASOLINE**

