AutoLaundry news

SURVEY

Results From The Auto Laundry News 2020 Full/Flex Survey

The 2020 *Auto Laundry News* Full/Flex Survey was conducted through a mailing of questionnaires to a random selection of our subscribers who own and operate conveyor car wash businesses other than exterior sites. The information presented in this report results from an analysis of data provided by respondents from locations throughout the United States.

Full-Service vs. Flex-Service Sites

For purposes of comparison, survey responses from full-service sites are on occasion tabulated separately from flex-service responses. Full-service participants make up 79 percent of the total, with flex-service sites accounting for 21 percent. This compares to last year's split of 82/18. Two years ago, flex-serve participants made up 44 percent of the total.

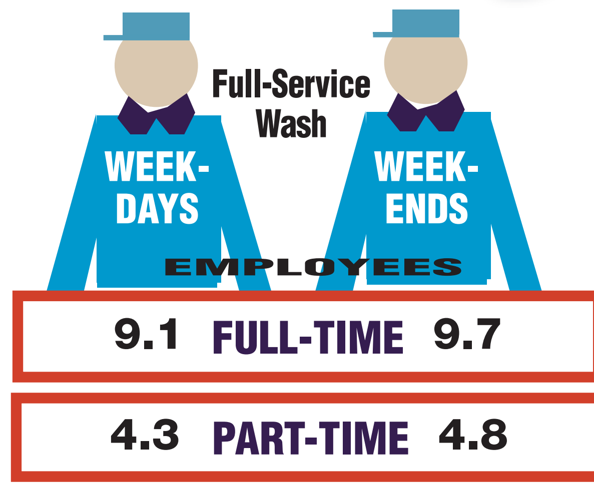
As in the past, respondents self-identify as to whether they belong in the full- or flex-serve category. This year, flex-service sites more closely resemble the ideal characteristics than in the past, with 83 percent reporting an after-care center on site. Last year that figure stood at 40 percent. Fully half of respondents in this category operate coin-op wand bays on site, while none did so in last year's survey. Seventy-one percent of flex-service respondents vacuum after the wash — only 40 percent of which do so at an after-care center. Full-service participants, for the most part — 63 percent — continue to employ pre-wash vacuuming.

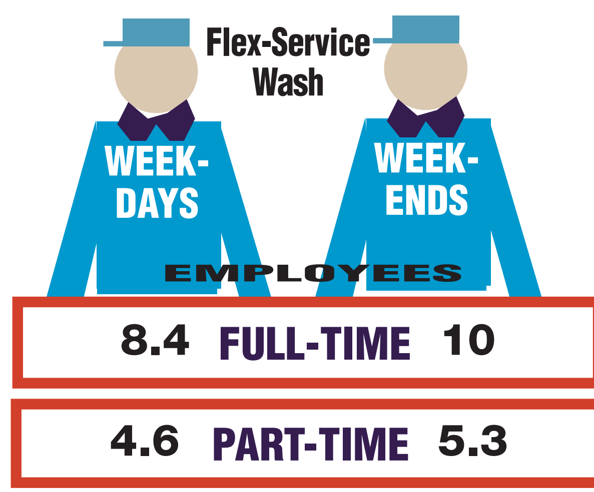
Wash Clubs

Thirty-eight percent of full-service respondents report operating monthly unlimited wash clubs with an average age of 7.6 years and an average membership count of 514. Flex-service sites are slightly less likely to offer their customers club privileges. A third operate wash clubs. And while they are relative newcomers to this promotion method — average age 3.5 years — they outdo their full-service counterparts with an average 677 members.

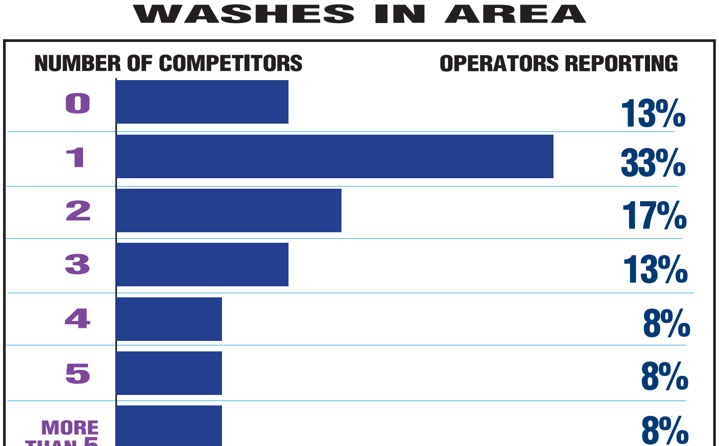
Revenues

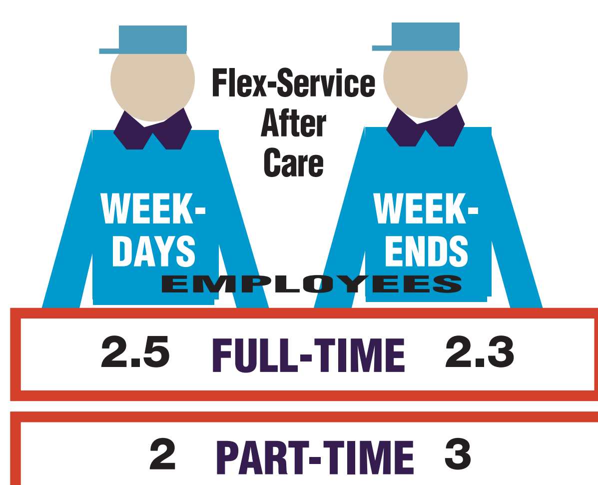
Overall, 40 percent of respondents report increased income compared to the previous year, a healthy improvement over the 29 percent that did so last year and closer to the 46 percent of the two consecutive years before that (the graphic on page 51 provides a five-year perspective). In the current survey, flex-service locations are largely responsible for this improvement: half of these respondents report advances while only 37 percent of full-service sites do so.





COMPETING CONVEYOR WASHES IN AREA





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	11	11	11	18	20	18
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	10	12	13	14	21	23	8
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	11	11	11	10	22	25	9
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	13	10	11	10	19	27	11
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	13	10	10	14	20	20	14
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	8	9	10	10	19	28	16
Mid-Atlantic New Jersey-New York-Pennsylvania	9	10	8	10	21	27	15
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	11	9	11	15	20	21	14

NOTE: *Some results total more than 100 due to rounding*

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	18	25	35	23
Mountain	41	29	15	15
Midwest	40	18	25	18
Central	58	15	15	13
South Central	25	35	18	23
Southeast	25	33	18	25
Mid-Atlantic	38	22	19	22
New England	35	23	27	15

NOTE: *Some results total more than 100 due to rounding*

OPEN SUNDAY

Full Service	Flex Service
82%	83%

OPEN 24 HOURS

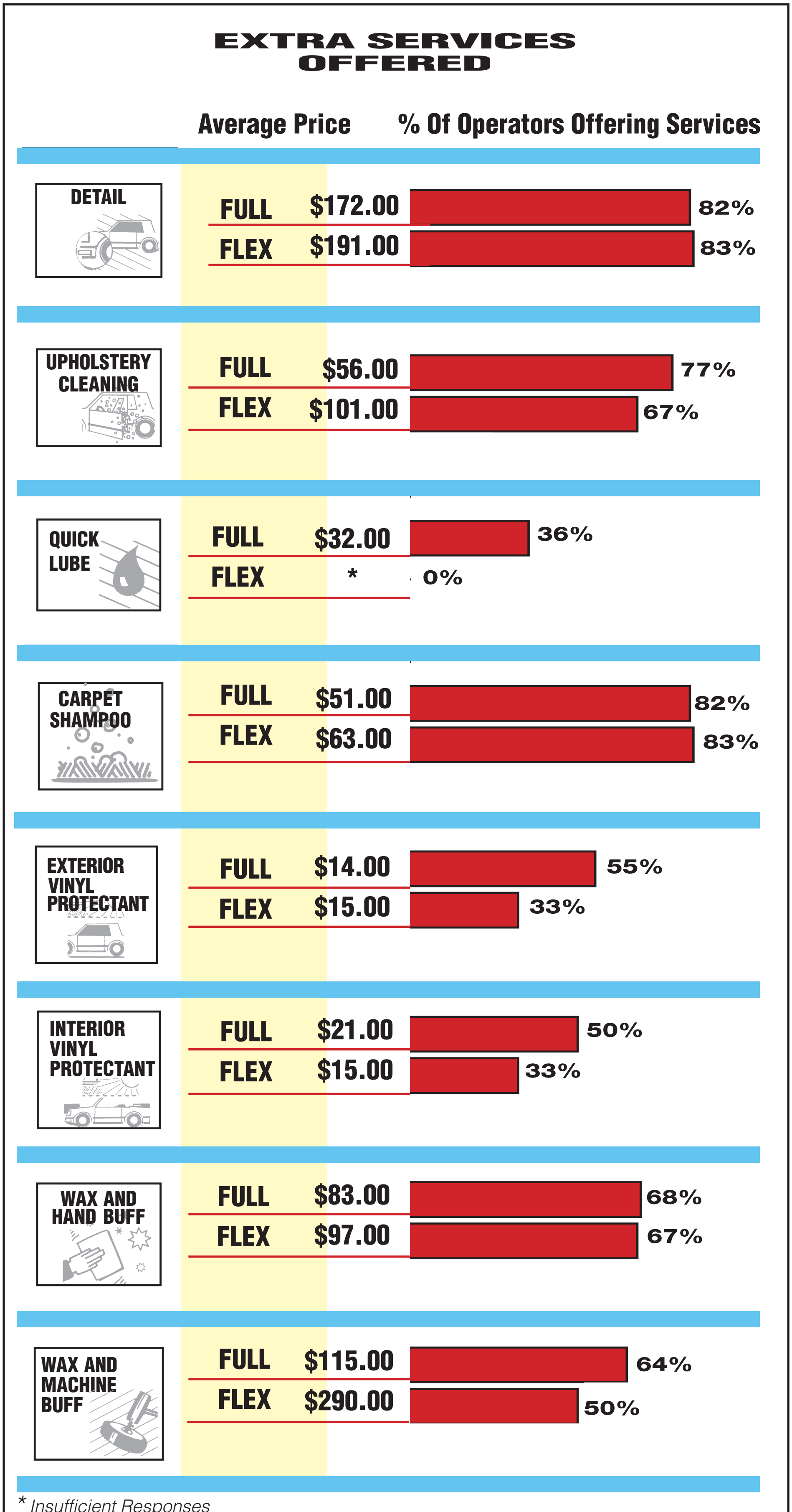
Full Service	Flex Service
0%	0%

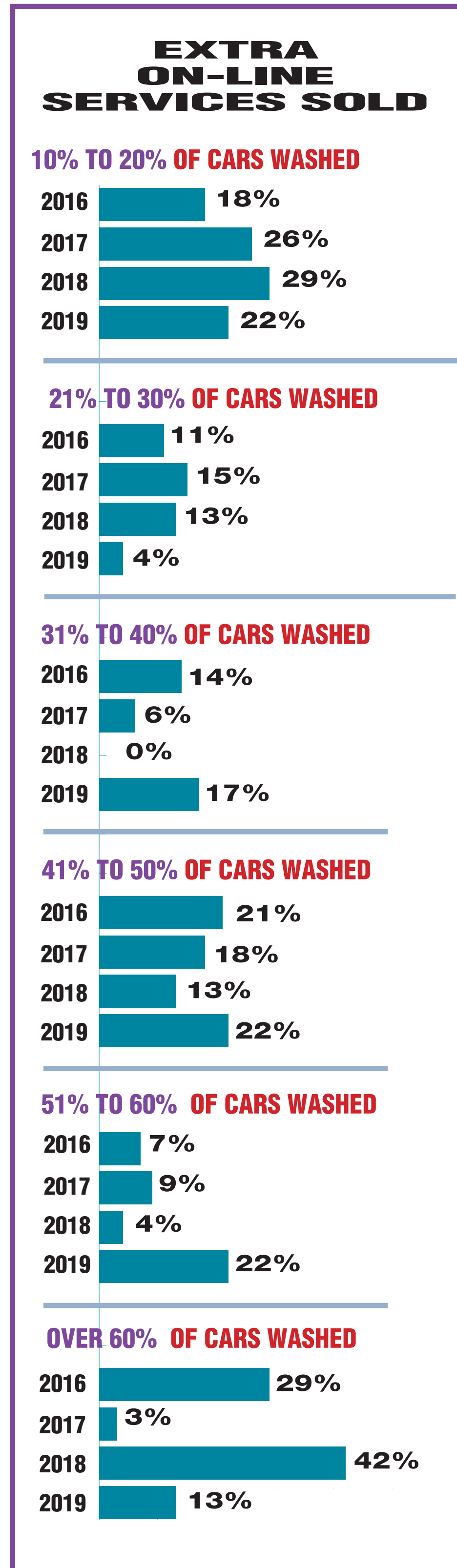
	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME
Full Service	32,214	70,900
Flex Service	33,330	35,200

AVERAGE GROSS REVENUE PER CAR

(CAR WASH SALES ONLY)

$17.62


EXTRA SERVICES OFFERED
Average Price
% Of Operators Offering Services
DETAIL
FULL $172.00 82%
FLEX $191.00 83%
UPHOLSTERY CLEANING
FULL $56.00 77%
FLEX $101.00 67%
QUICK LUBE
FULL $32.00 36%
FLEX * 0%
CARPET SHAMPOO
FULL $51.00 82%
FLEX $63.00 83%
EXTERIOR VINYL PROTECTANT
FULL $14.00 55%
FLEX $15.00 33%
INTERIOR VINYL PROTECTANT
FULL $21.00 50%
FLEX $15.00 33%
WAX AND HAND BUFF
FULL $83.00 68%
FLEX $97.00 67%
WAX AND MACHINE BUFF
FULL $115.00 64%
FLEX $290.00 50%
* *Insufficient Responses*


EXTRA ON-LINE SERVICES SOLD
10% TO 20% OF CARS WASHED
2016 18%
2017 26%
2018 29%
2019 22%
21% TO 30% OF CARS WASHED
2016 11%
2017 15%
2018 13%
2019 4%
31% TO 40% OF CARS WASHED
2016 14%
2017 6%
2018 0%
2019 17%
41% TO 50% OF CARS WASHED
2016 21%
2017 18%
2018 13%
2019 22%
51% TO 60% OF CARS WASHED
2016 7%
2017 9%
2018 4%
2019 22%
OVER 60% OF CARS WASHED
2016 29%
2017 3%
2018 42%
2019 13%

PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT

Equipment	%
Friction Wash (Cloth 44% Foam 31% Bristle 0% Combo 19%)	60%
Touchless Wash	15%
Hybrid Wash	5%
Hand wash	20%
Over and Under Conveyor	94%
Surface Conveyor	6%
Flat belt Conveyor	0%
Washing Curtains	28%
Stationary Mitter Curtains	17%
Motorized mitter curtains	89%
Prep Guns	83%
Computerized Conveyor Service	67%
High-Pressure Flood Arch	50%
Wax Arch	83%
Foam Applicator	78%
Top Brush	22%
Tire Brush	56%
Rocker Brush	67%
Wraparounds	72%
Window Side Brush	28%
Reverse Osmosis System	22%
Air Dryers	94%
Drying Curtains	11%
Water Reclaim System	39%
Tire Dressing Applicator	28%
Water Repellent Arch	56%
Bubbler Arch	11%
Lava Application	33%
LED Lighting	50%
Digital Menu/ Signage	17%
Friction Drying System	6%
Paint Sealant	33%

OPERATE FREESTANDING AFTER-CARE CENTER

FULL SERVICE	FLEX SERVICE
32%	83%

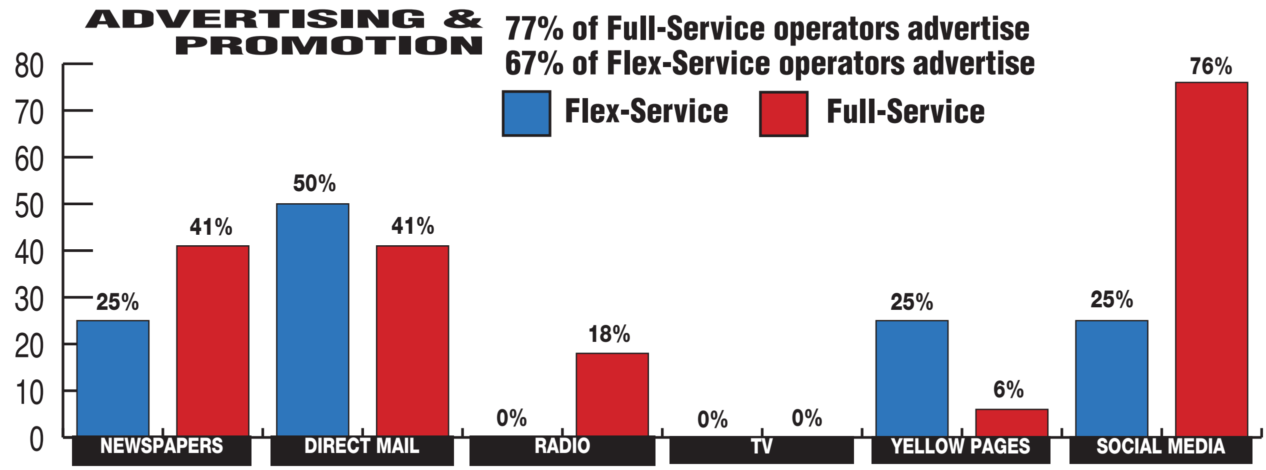
OPERATE COIN-OP BAYS ON SITE

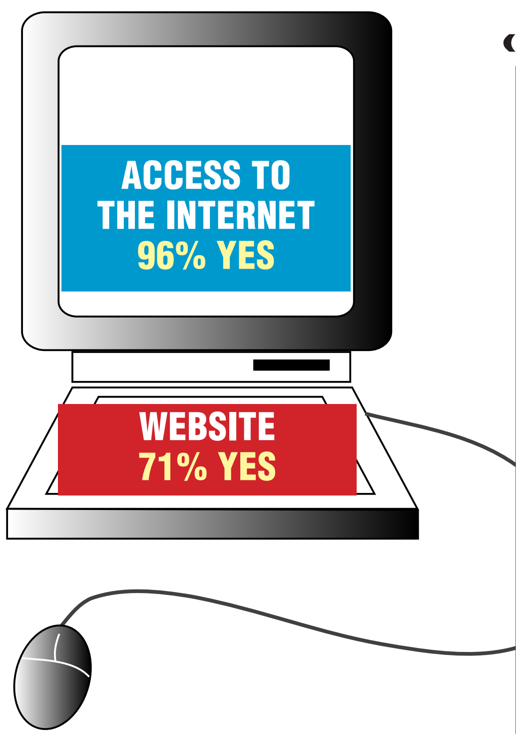
FULL SERVICE	FLEX SERVICE
18%	50%

AVERAGE NUMBER OF BAYS	
5	5

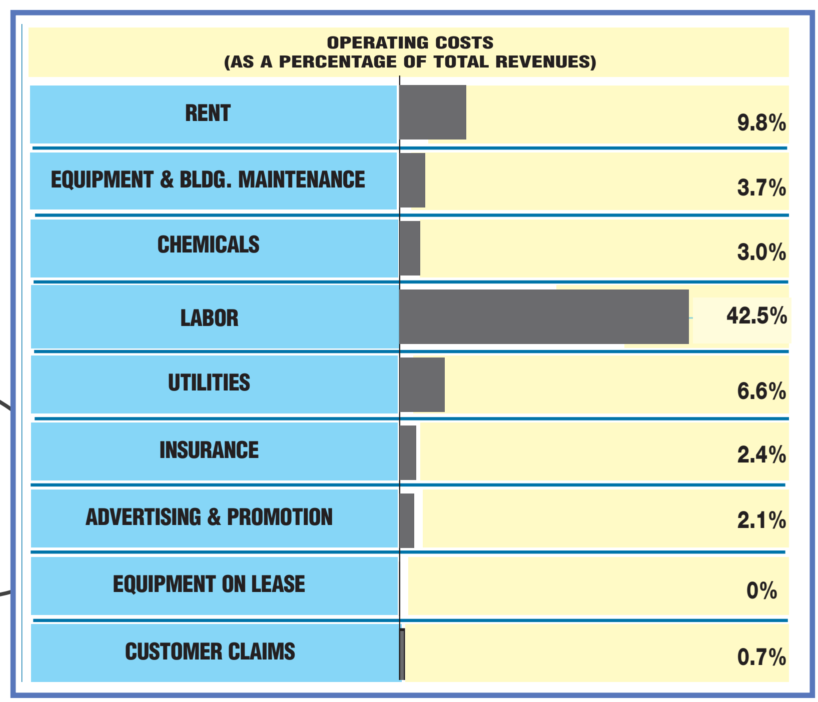
NON-AUTO PROFIT CENTERS ON SITE

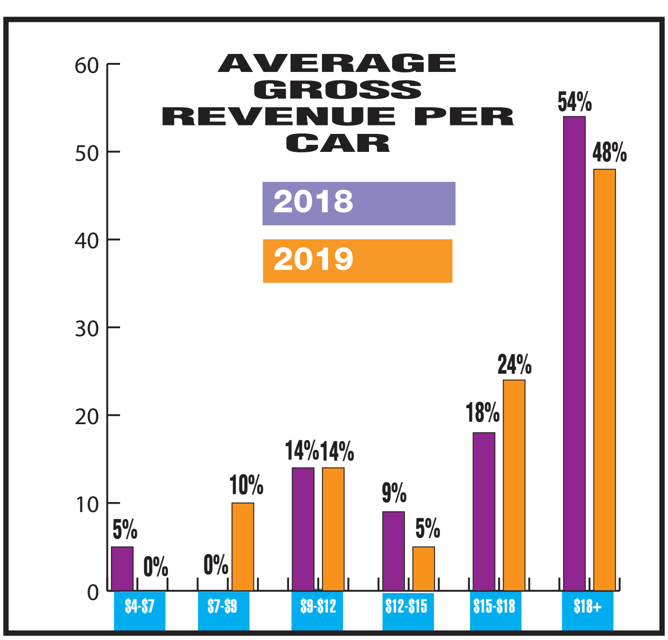
Profit Center	%
ATM	11%
Cell Phones	0%
Coffee Bar	14%
Fast Food	0%
Greeting Cards	18%
Lotto	7%
Magazines	7%
Music (CDs etc.)	0%
Pay Phones	0%
Phone Cards, Prepaid	0%
Video Games	4%

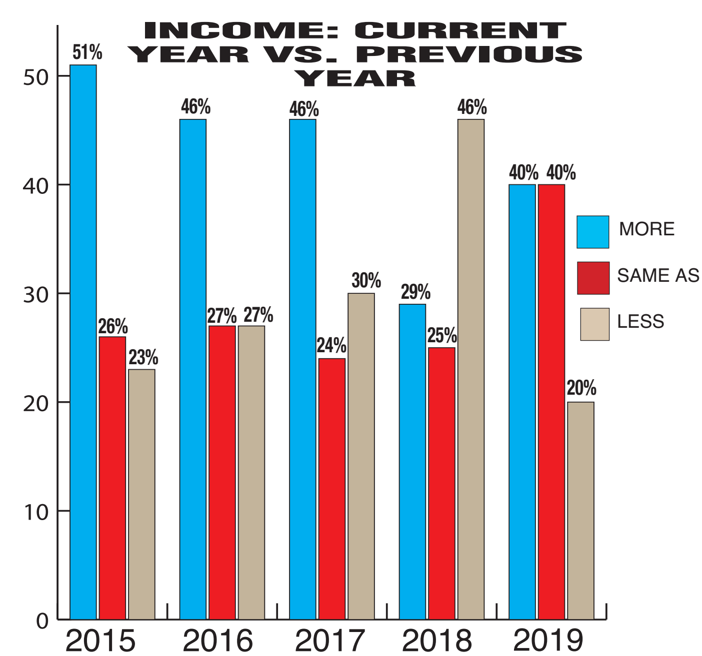




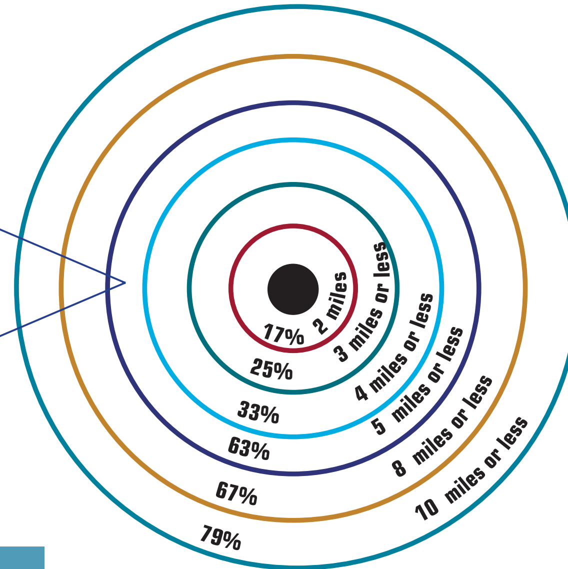
OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)



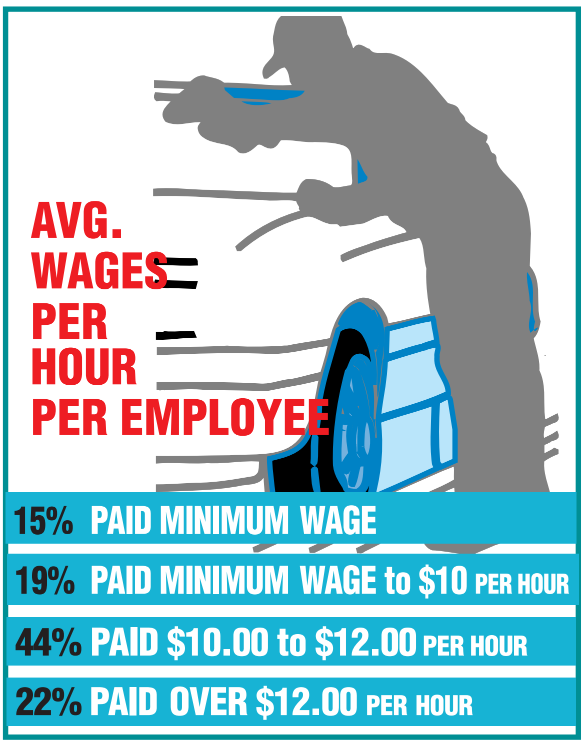


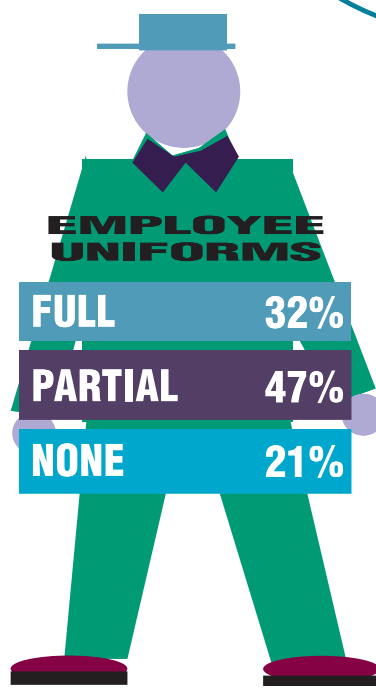


HOW FAR DO CUSTOMERS COME?
(Percent from within 2-mile radius, 3-mile radius, etc.)



LABOR COSTS





OPERATORS SELLING GASOLINE