



AutoLaundry^{news}
THE VOICE OF THE CAR CARE INDUSTRY

*Results from the
Auto Laundry News*

2013
Conveyor Survey

www.carwashmag.com

Results From The Auto Laundry News **2013** CONVEYOR SURVEY

The 2013 *Auto Laundry News* Conveyor Survey was conducted through a mailing of questionnaires to a random selection of our subscribers who own and operate conveyor car wash businesses. The information presented in this report results from an analysis of data provided by 103 respondents from locations throughout the United States.

Full-Service vs. Exterior-Only Sites

For purposes of comparison, survey responses from full-service sites are on occasion tabulated separately from exterior-only responses. Full-service participants make up 45 percent of the total, with exterior-only sites accounting for 55 percent. This is an exact reversal of last year's survey pool.

Fully two thirds of full-service respondents identify as on-line full-service washes; there is an even split between those who describe their operations as exterior with off-line full service (16.5 percent); and those who say they operate flex-serve washes (16.5 percent). Thirty percent of exterior respondents define their businesses as express exteriors; 62 percent label them exterior only; 8 percent use the term exterior with off-line full service.

Revenues

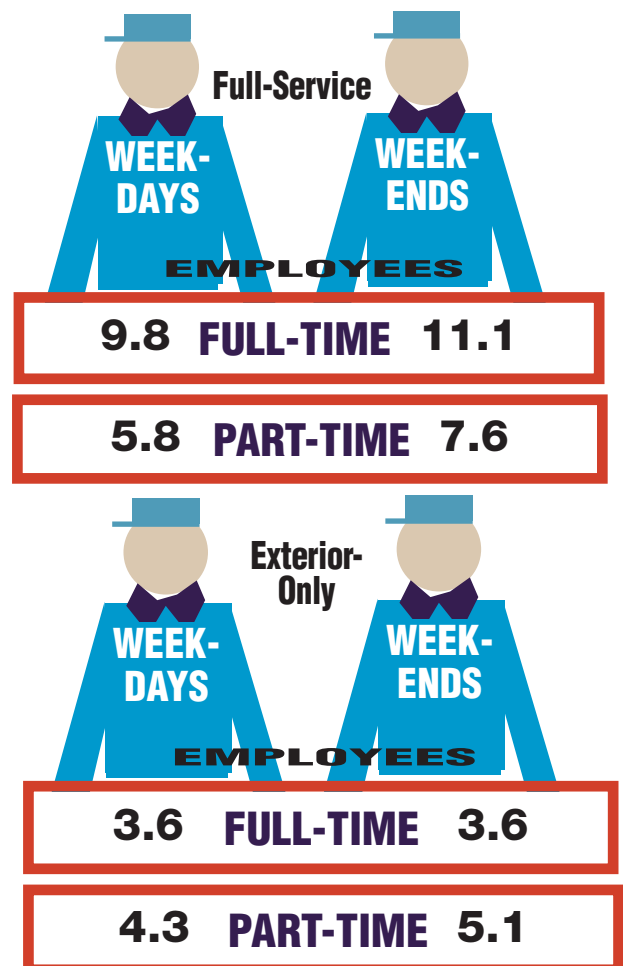
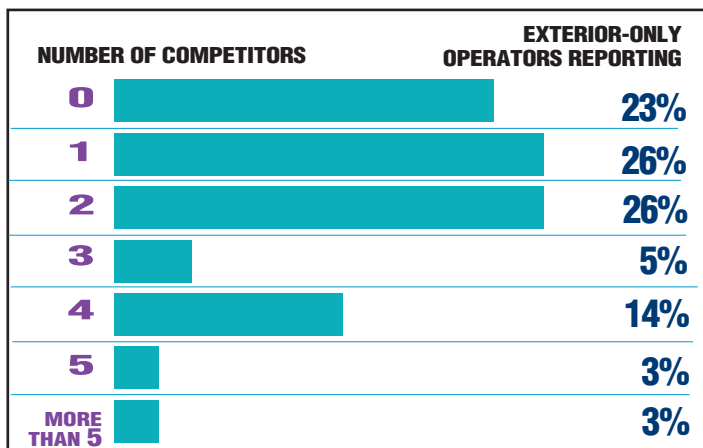
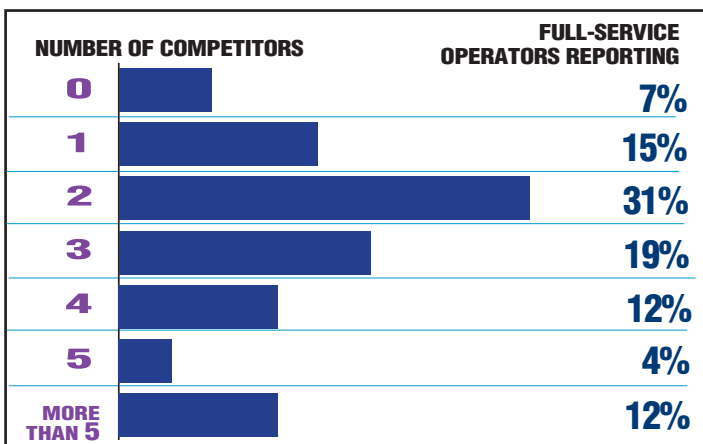
Overall, 54 percent of respondents report increased income compared to the previous year — the largest proportion since 2000. The graphic on page 40 provides a four-year perspective. Exterior participants outperform full-service respondents: 61 percent of the former report income growth; only 45 percent of the latter do so. Likewise, 19.5 percent of exterior respondents saw a decline in income, while 31 percent of full-service respondents experienced reversals.

Full-serve respondents, who made progress, report an average income growth of 11.3 percent over the previous year. Full-serve respondents, who backpedaled, report an average decline in income of 7.5 percent. The comparable percentages for exterior respondents are 14.1 percent growth and 6.8 percent decline.

Future

Twenty percent of full-service and 11 percent of exterior operators are planning expansions. Of the former, half plan on building a new exterior wash in the next 12 months; the rest are planning either full- or flex-serve operations. Exterior operators plan on remaining exclusively exterior. 📷

COMPETING CONVEYOR WASHES IN AREA



PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION

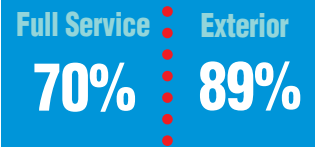
	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	12	13	10	13	20	19	13
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	15	13	10	12	15	25	10
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	13	10	10	13	25	25	4
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	12	13	13	16	23	13
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	10	8	10	11	20	27	14
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	11	9	12	10	18	26	14
Mid-Atlantic New Jersey-New York-Pennsylvania	11	10	10	11	15	25	18
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

* Too Few Responses

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION

	WINTER	SPRING	SUMMER	FALL
Pacific	24	25	29	22
Mountain	30	17	40	13
Midwest	39	27	21	13
Central	46	22	17	15
South Central	24	29	21	26
Southeast	30	32	16	22
Mid-Atlantic	34	29	19	18
New England	37	27	23	13

OPEN SUNDAY











OPEN 24 HOURS



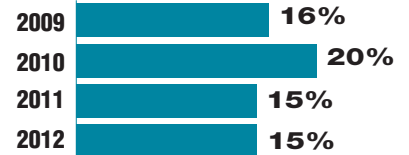
	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME	AVERAGE MONTHLY IMPULSE SALES
Full Service	35,278	46,738	\$2,558
Exterior Only	38,869	82,521	\$350

EXTRA SERVICES AT FULL-SERVICE SITES

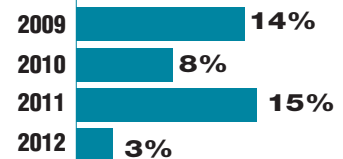
	Average Price	% Of Operators Offering Services	
 DETAIL	\$115.00	2010	71%
	\$138.56	2011	81%
	\$148.00	2012	77%
 UPHOLSTERY CLEANING	\$44.29	2010	74%
	\$49.56	2011	74%
	\$55.91	2012	77%
 QUICK LUBE	\$32.60	2010	19%
	\$35.98	2011	24%
	\$39.30	2012	33%
 CARPET SHAMPOO	\$40.93	2010	77%
	\$36.78	2011	81%
	\$42.06	2012	83%
 EXTERIOR VINYL PROTECTANT	\$17.67	2010	48%
	\$9.99	2011	60%
	\$14.39	2012	47%
 INTERIOR VINYL PROTECTANT	\$33.86	2010	48%
	\$9.67	2011	60%
	\$19.41	2012	70%
 WAX AND HAND BUFF	\$49.29	2010	71%
	\$73.87	2011	76%
	\$56.63	2012	67%
 WAX AND MACHINE BUFF	\$59.64	2010	58%
	\$88.12	2011	67%
	\$77.99	2012	70%

EXTRA ON-LINE SERVICES SOLD

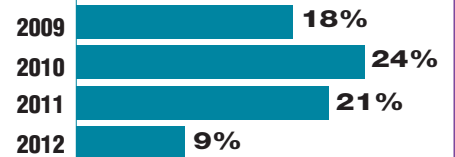
10% TO 20% OF CARS WASHED



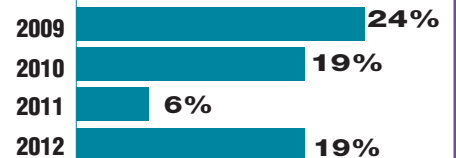
21% TO 30% OF CARS WASHED



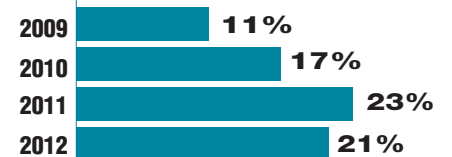
31% TO 40% OF CARS WASHED



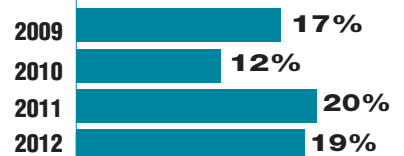
41% TO 50% OF CARS WASHED



51% TO 60% OF CARS WASHED



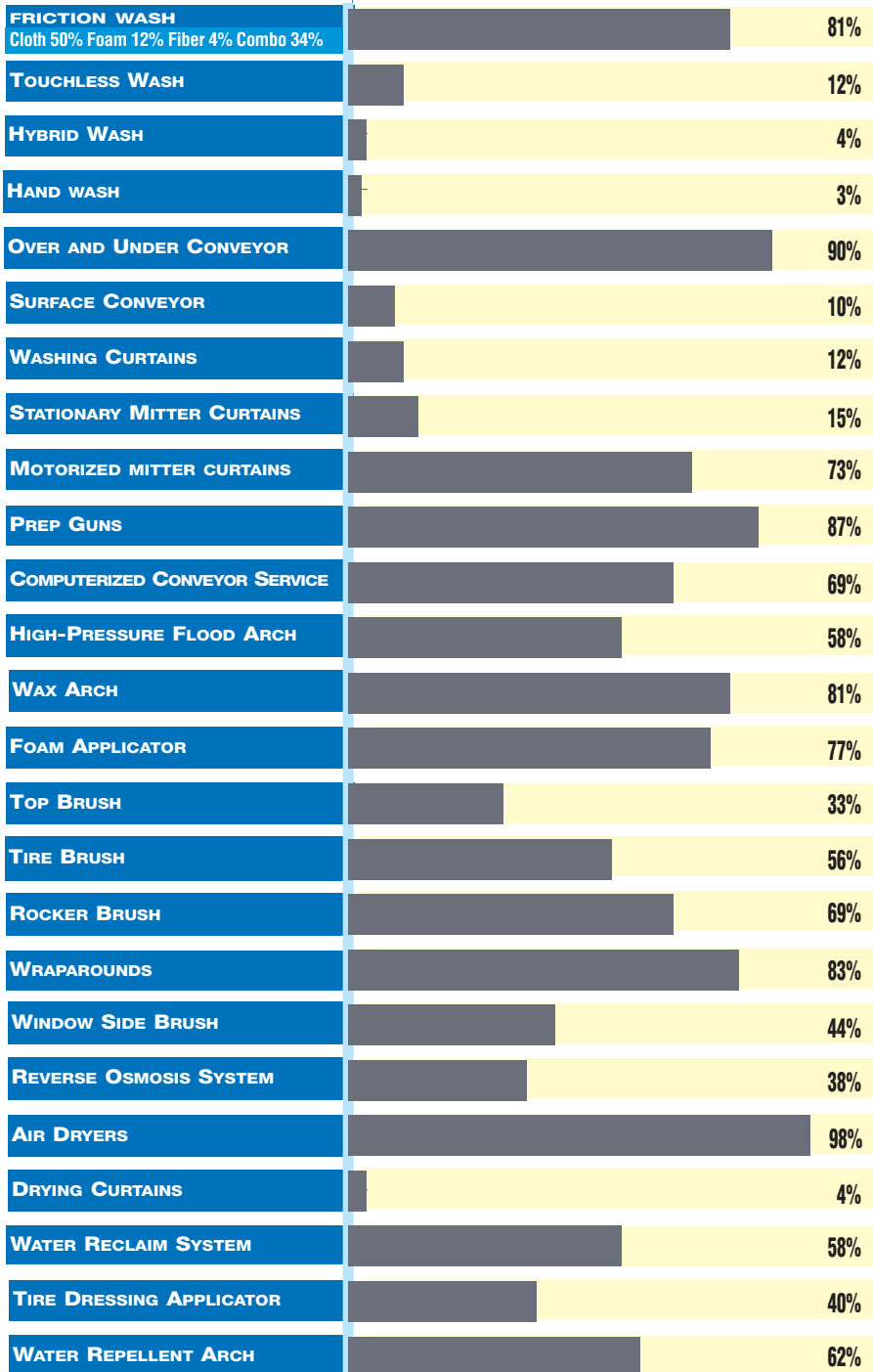
OVER 60% OF CARS WASHED



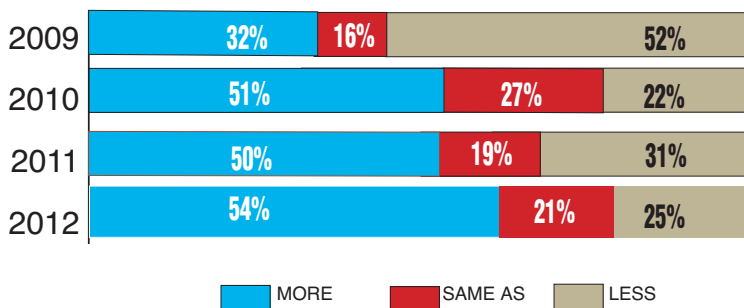
0 5 10 15 20 25

SURVEY

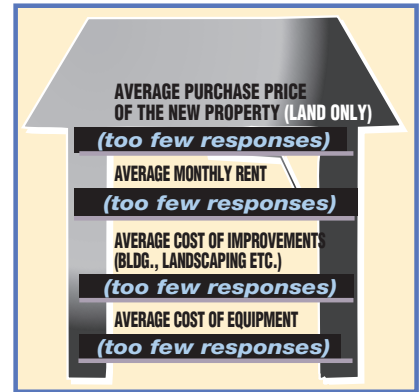
PERCENTAGE OF OPERATORS USING THE FOLLOWING EQUIPMENT



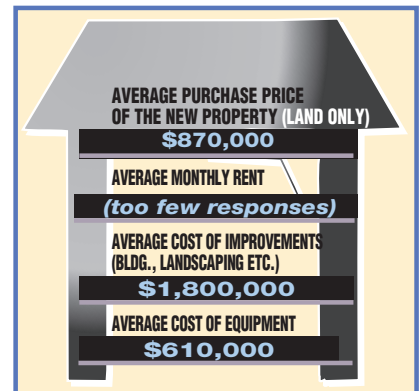
INCOME: CURRENT YEAR VS. PREVIOUS YEAR



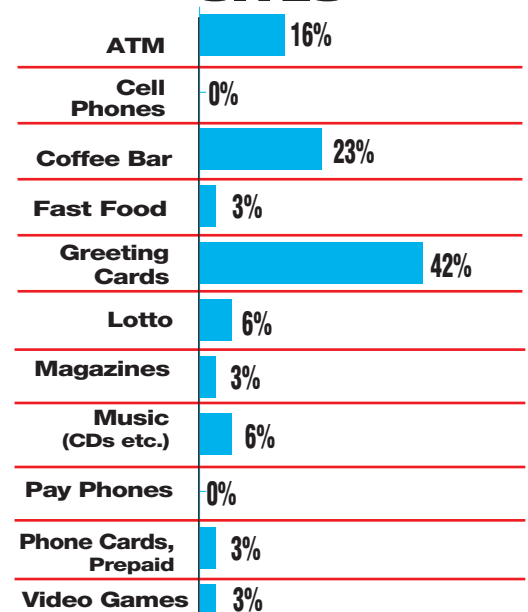
NEW FULL-SERVICE WASH BUILT WITHIN THE PAST YEAR



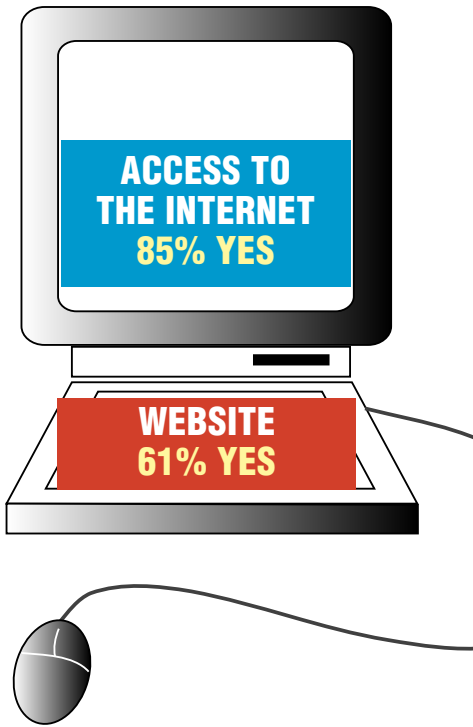
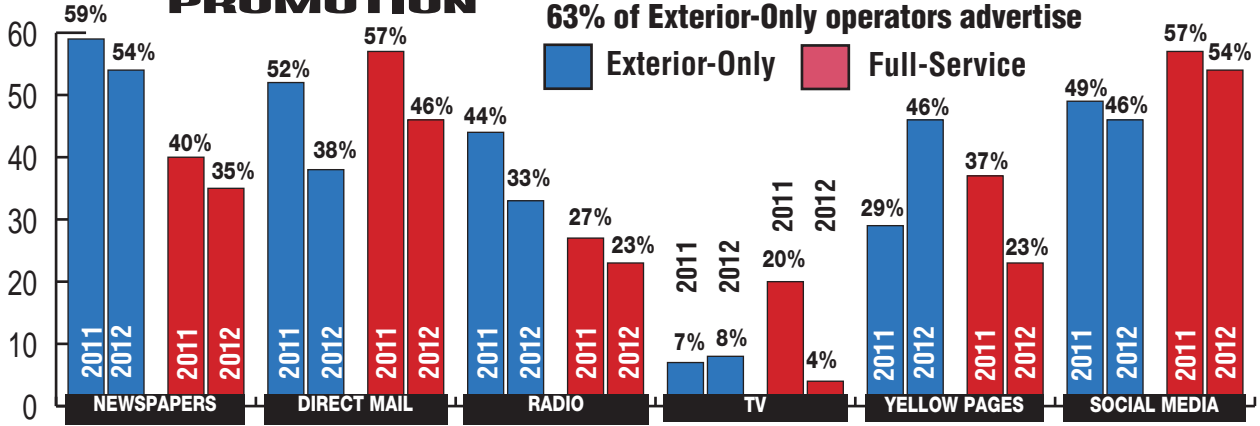
NEW EXTERIOR-ONLY WASH BUILT WITHIN THE PAST YEAR



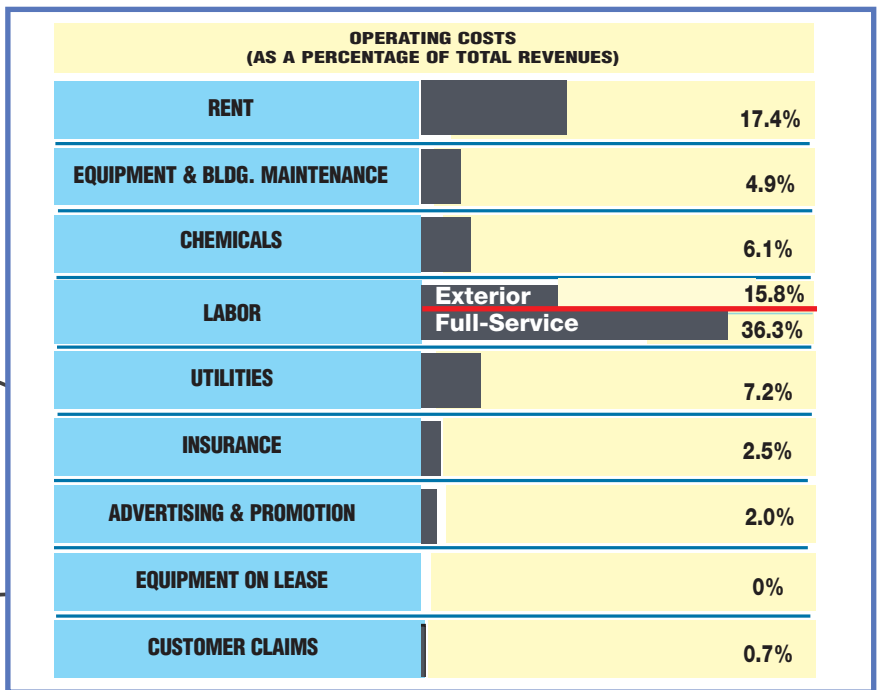
NON-AUTO PROFIT CENTERS AT FULL-SERVICE SITES



ADVERTISING & PROMOTION



OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)



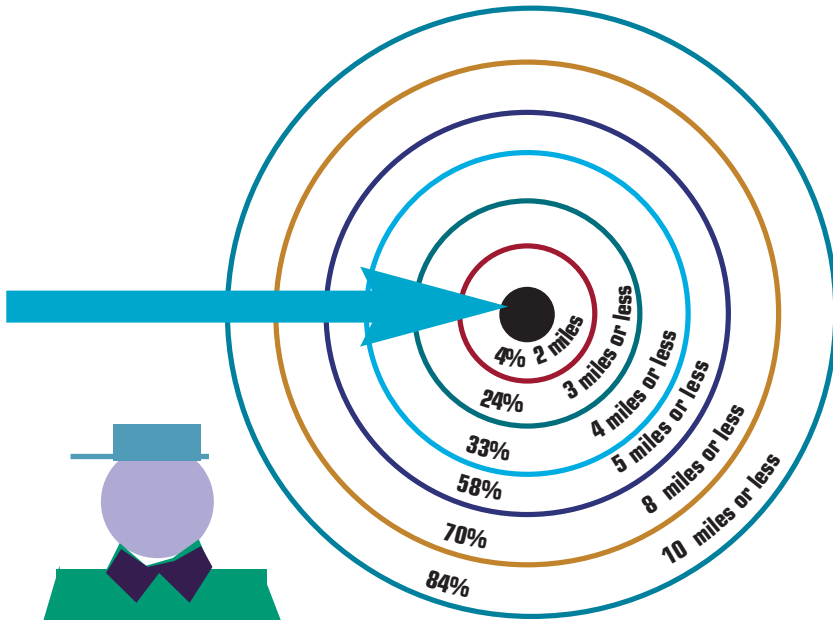
AVERAGE GROSS REVENUE PER CAR



SURVEY

HOW FAR DO CUSTOMERS COME?

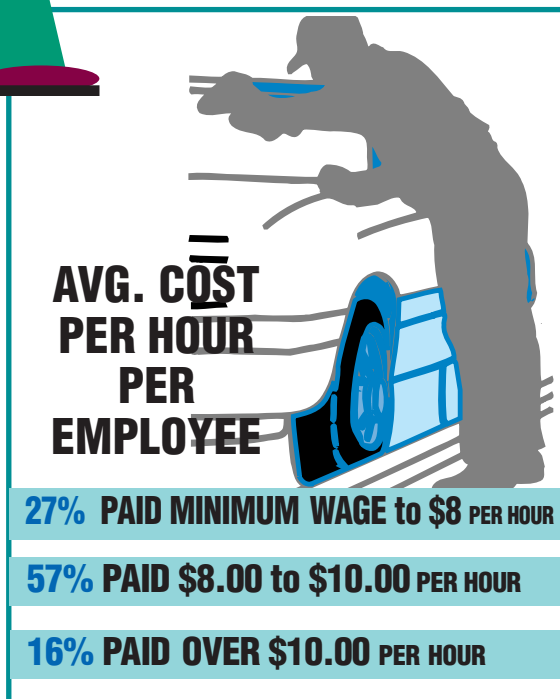
(Percentage from within 2-mile radius, 3-mile radius, etc.)



EMPLOYEE UNIFORMS



LABOR COSTS



CONVEYOR ON-LINE EXTRA SERVICES

