

AutoLaundry^{news}

SURVEY

Results From The Auto Laundry News **2011** CONVEYOR SURVEY

The 2011 *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 a reversal of last year's survey pool in which the 56/44 split favored full-service locations.

Revenues

The glimmer of hope identified in last year's survey did not disappoint. For the first time in three years, a majority of respondents overall — albeit, at 51 percent, only just — are able to report increased income compared to the previous year. That is a significant improvement over the 32 percent who reported progress last year and the 21

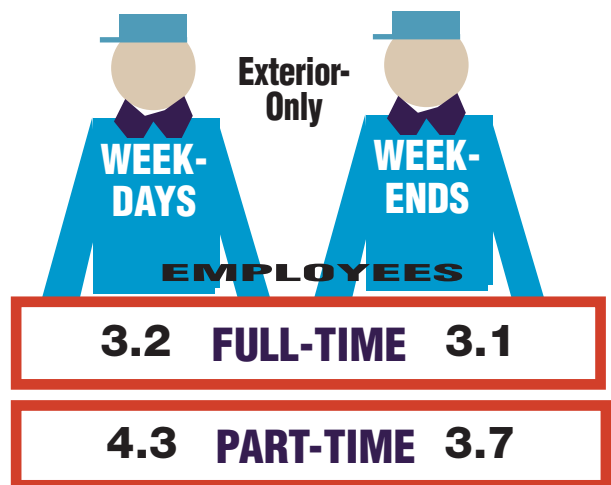
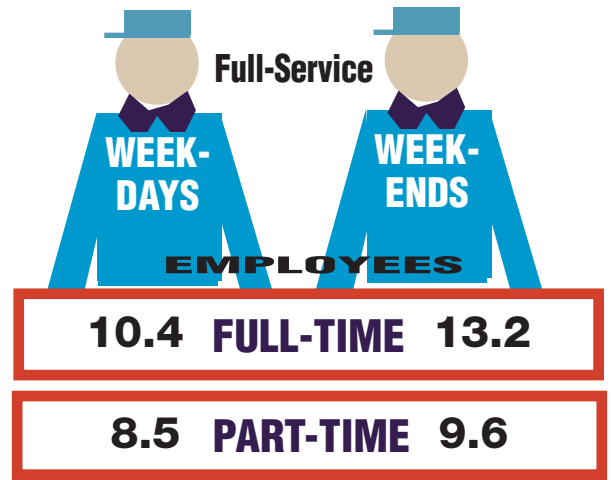
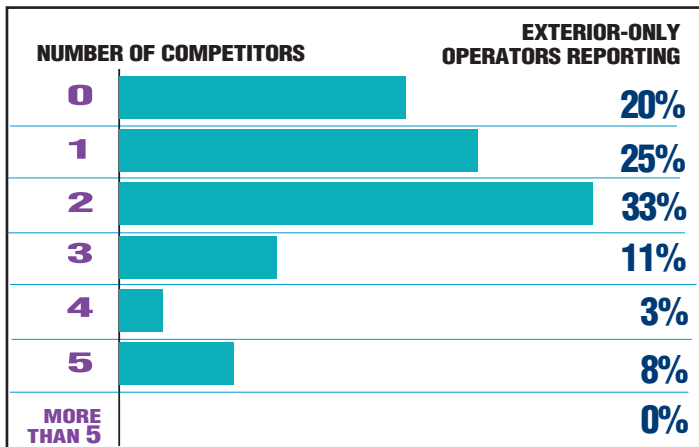
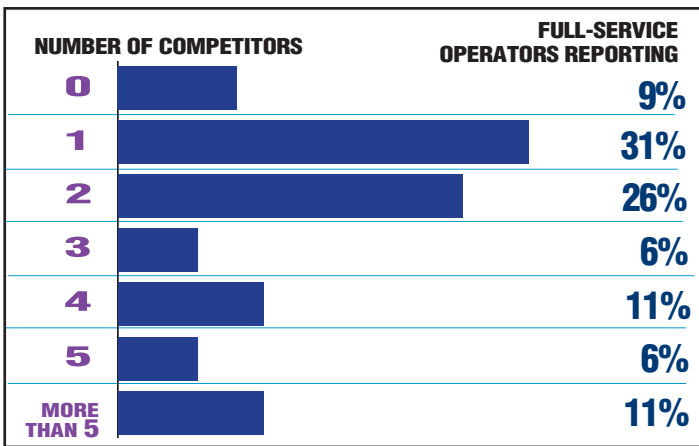
percent who did so the year before that. The improvement on the negative side of the scale is even more dramatic: Overall, only 22 percent of respondents report a decline in income - the smallest group to do so in the past 10 years. This figure also represents a remarkable improvement over the 52 percent of respondents who reported reversals in the previous survey.

In a turnabout of a two-year trend, full-service locations are outperforming their exterior counterparts, but not by much: 52 percent of full-serves compared to 50 percent of exteriors report revenue growth, while 19 percent of full-serves an 25 percent of exteriors report revenue declines.

Future

There is little enthusiasm for expansion on the full-service side — only 3 percent plan on building a new wash (11 percent last year). The exterior side is a little more aggressive — 13 percent are considering additions to their car wash portfolios in the next 12 months (8 percent last year).

COMPETING CONVEYOR WASHES IN AREA



SURVEY

PERCENTAGE OF WASH BUSINESS DONE BY DAY OF WEEK BY REGION							
	MON	TUES	WED	THURS	FRI	SAT	SUN
Pacific Alaska-California-Hawaii-Oregon-Washington	14	9	12	11	20	22	12
Mountain Arizona-Colorado-Idaho-Montana-Nevada-New Mexico-Utah-Wyoming	10	11	11	10	20	25	13
Midwest Iowa-Kansas-Minnesota-Missouri-Nebraska-North Dakota-South Dakota	14	7	8	8	20	25	18
Central Illinois-Indiana-Michigan-Ohio-Wisconsin	10	13	11	12	20	24	10
South Central Alabama-Arkansas-Kentucky-Louisiana-Mississippi-Oklahoma-Tennessee-Texas	14	11	12	13	19	24	7
Southeast Delaware-Florida-Georgia-Maryland Carolinas-Virginia-West Virginia	10	8	10	11	19	29	13
Mid-Atlantic New Jersey-New York-Pennsylvania	10	9	10	12	22	24	13
New England Connecticut-Maine-Massachusetts-New Hampshire-Rhode Island-Vermont	*	*	*	*	*	*	*

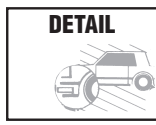
* Too Few Responses

PERCENTAGE OF WASH BUSINESS DONE BY SEASON BY REGION						
	WINTER	SPRING	SUMMER	FALL	VOTED BEST MONTH	% OF VOTES
Pacific	22	25	33	20	July	38
Mountain	27	19	33	21	Jan	57
Midwest	30	25	19	26	Feb	67
Central	42	19	24	15	March	47
South Central	28	26	20	26	Feb	43
Southeast	29	31	18	22	April	33
Mid-Atlantic	34	23	22	21	Jan	43
New England	50	17	18	15	Jan/Feb	50 each

	AVERAGE DAILY TRAFFIC COUNT	AVERAGE ANNUAL WASH VOLUME	AVERAGE MONTHLY IMPULSE SALES
Full Service	40,000	50,000	\$3,446
Exterior Only	29,000	57,000	\$815

EXTRA SERVICES AT FULL-SERVICE SITES

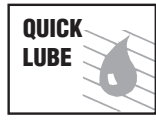
Average Price % Of Operators Offering Services



\$149.92	2008	77%
\$121.43	2009	78%
\$115.00	2010	71%



\$43.92	2008	73%
\$45.30	2009	72%
\$44.29	2010	74%



\$32.65	2008	21%
\$37.33	2009	15%
\$32.60	2010	19%



\$42.20	2008	83%
\$38.72	2009	74%
\$40.93	2010	77%



\$11.39	2008	36%
\$12.31	2009	39%
\$17.67	2010	48%



\$13.50	2008	46%
\$18.00	2009	52%
\$33.86	2010	48%



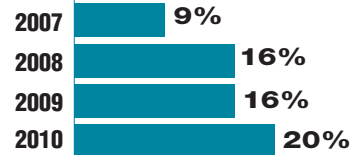
\$54.95	2008	75%
\$62.44	2009	76%
\$49.29	2010	71%



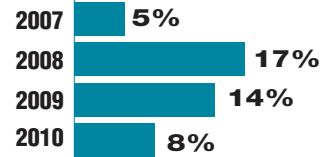
\$73.76	2008	69%
\$65.47	2009	67%
\$59.64	2010	58%

EXTRA ON-LINE SERVICES SOLD

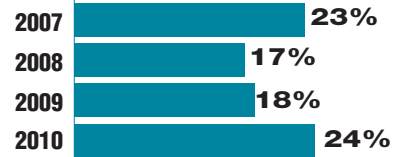
10% TO 20% OF CARS WASHED



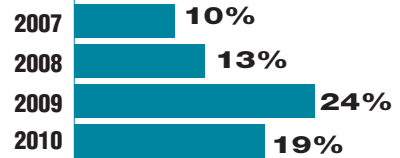
21% TO 30% OF CARS WASHED



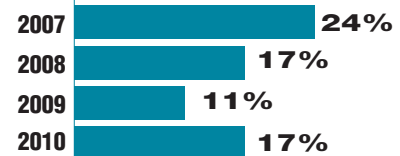
31% TO 40% OF CARS WASHED



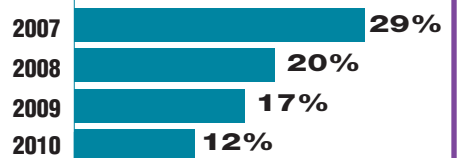
41% TO 50% OF CARS WASHED



51% TO 60% OF CARS WASHED



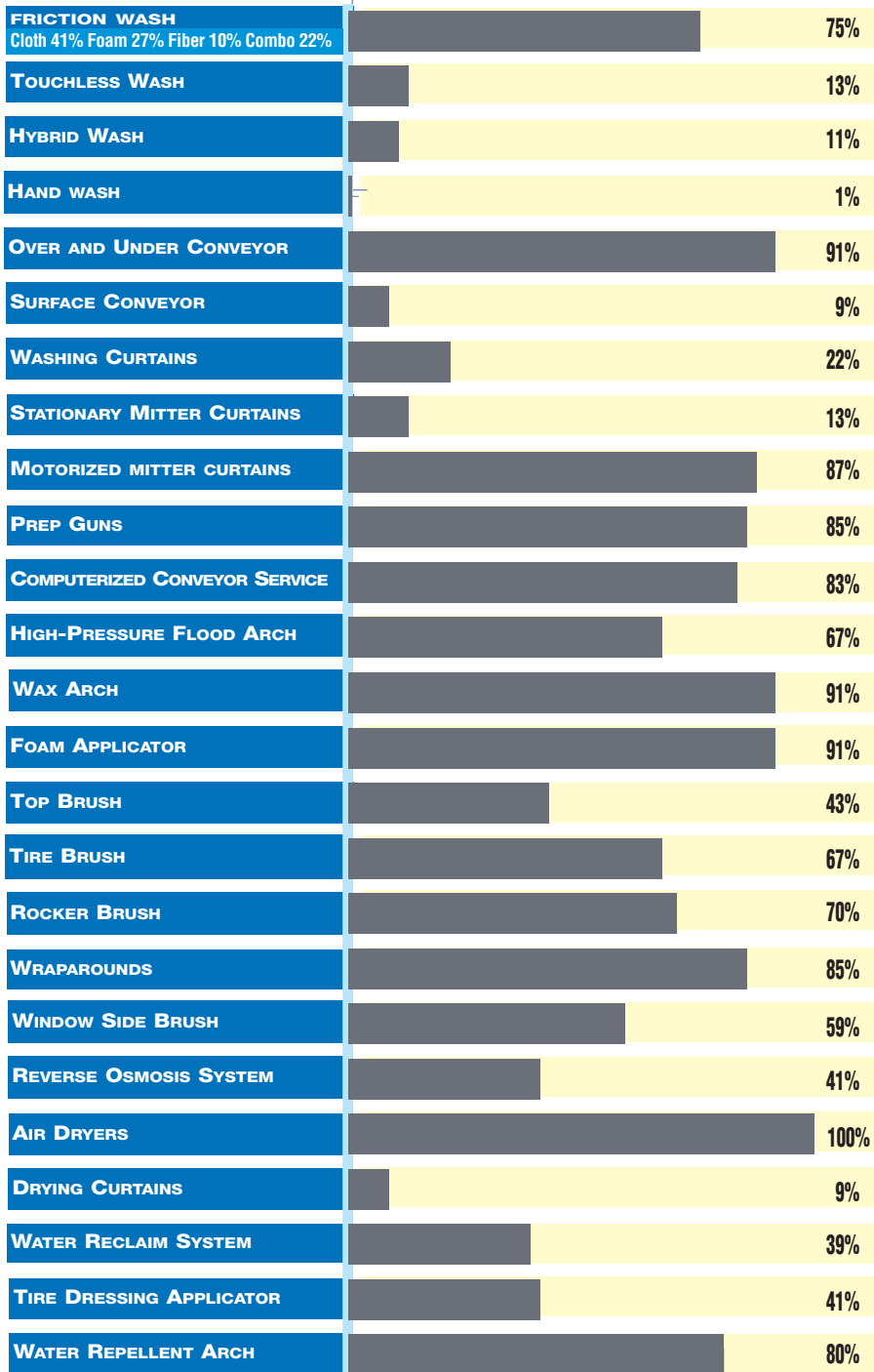
OVER 60% OF CARS WASHED



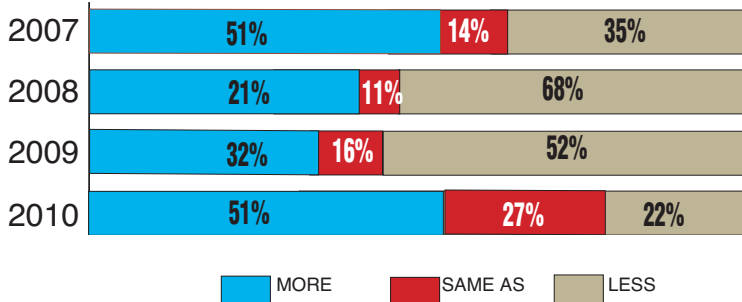
0 5 10 15 20 25 30

SURVEY

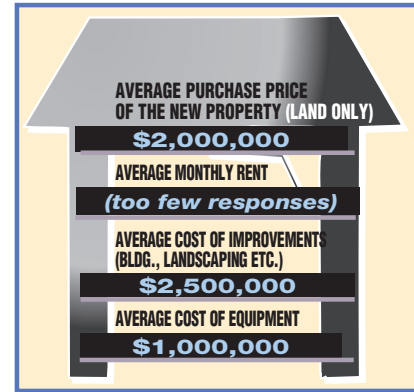
PERCENTAGE OF OPERATORS USING FOLLOWING EQUIPMENT



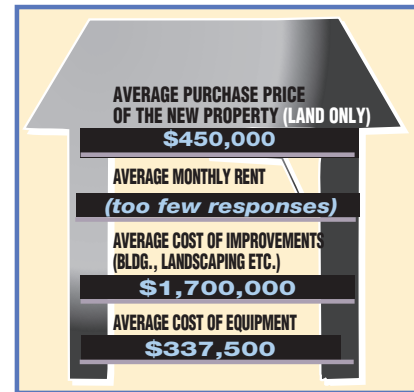
INCOME: CURRENT YEAR VS. PREVIOUS YEAR



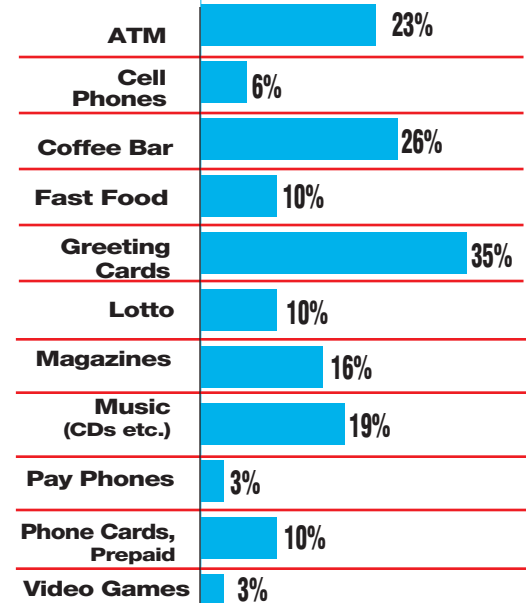
NEW FULL-SERVICE WASH BUILT WITHIN THE PAST YEAR



NEW EXTERIOR-ONLY WASH BUILT WITHIN THE PAST YEAR

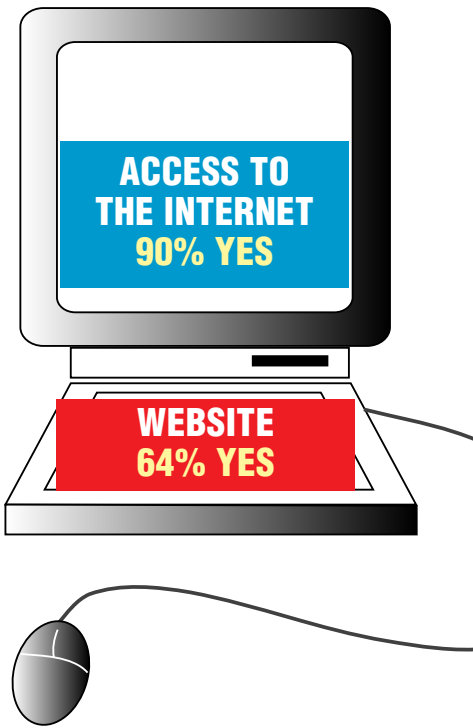
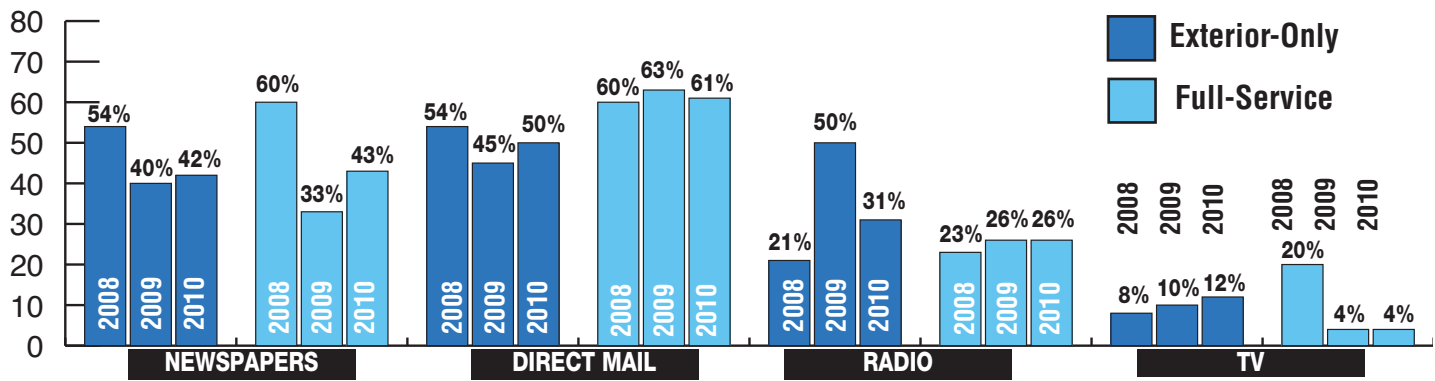


NON-AUTO PROFIT CENTERS AT FULL-SERVICE SITES

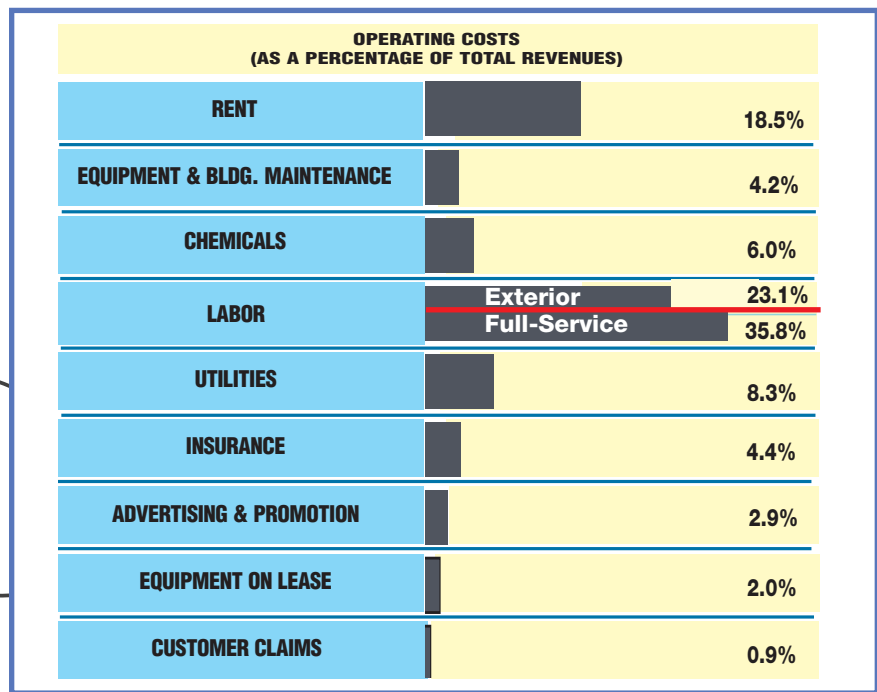


ADVERTISING & PROMOTION

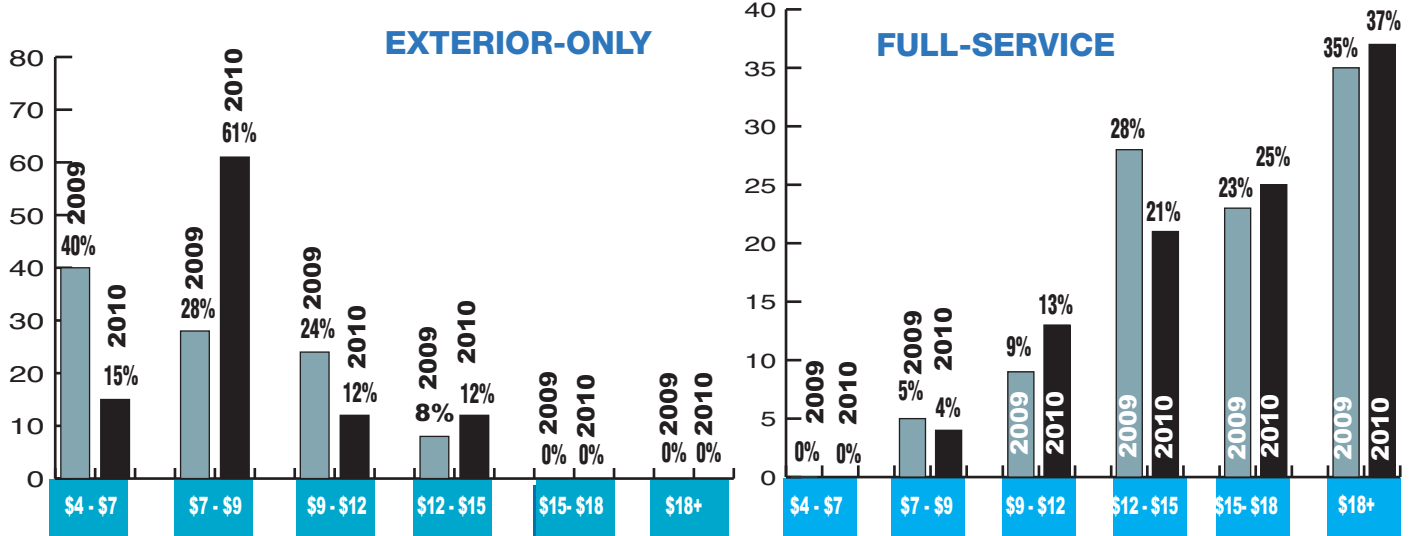
74% of Full-Service operators advertise
68% of Exterior-Only operators advertise



OPERATING COSTS (AS A PERCENTAGE OF TOTAL REVENUES)

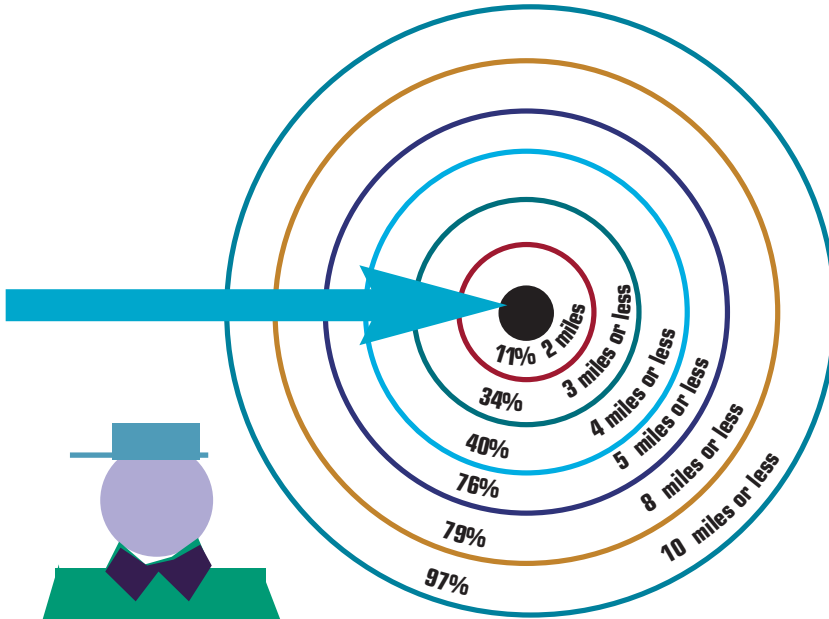


AVERAGE GROSS REVENUE PER CAR

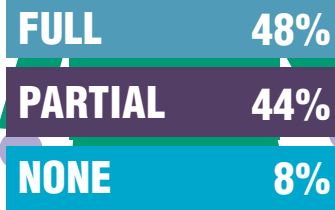


SURVEY

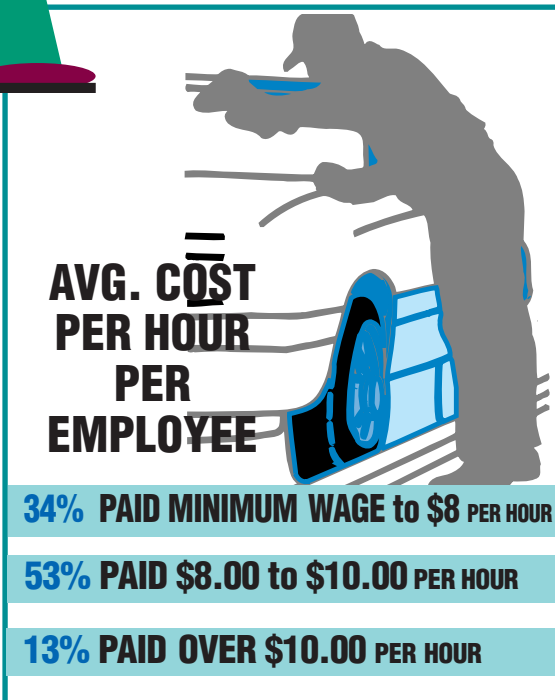
HOW FAR DO CUSTOMERS COME? (Percentage from within 2-mile radius, 3-mile radius, etc.)



EMPLOYEE UNIFORMS



LABOR COSTS



CONVEYOR ON-LINE EXTRA SERVICES

