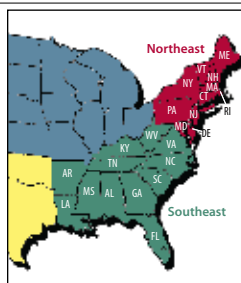


REGIONAL BREAKDOWN OF THE 2008 FAST LUBE OPERATORS SURVEY: NORTHEAST AND SOUTHEAST REGIONS

OPERATIONS	NATIONAL	NORTHEAST	SOUTHEAST
Years in the fast lube business	11.7	13.5	11.4
Number of facilities per response	2.2	1.8	2.3
Cost of goods for standard, full-service LOF	\$12.75	\$11.75	\$12.45
Average ticket total	\$50.80	\$47.46	\$50.73
Number of cars serviced per day	33.9	33.8	36.2
Operators who own their building/land	56%	50%	70%
Operators who lease their building/land	23%	40%	25%
Operators who both own and lease their buildings/land	21%	10%	5%
Building/land costs for most recent fast lube (if owned)	\$584,430	\$572,000	\$560,930
Cost for leasing building/land (per month)	\$4,619	\$3,895	\$4,967
Equipment costs for fast lube	\$64,398	\$89,147	\$53,644
Annual gross sales per store	\$535,803	\$526,714	\$522,938
Average amount of per-store warranty work performed during preceding 12 months	\$1,053	\$1,158	\$792
Operators who have customers enter your lube: From the front (street side)	49%	50%	43%
Back	51%	50%	57%
Operators who offer a free fluid top-off	86%	67%	77%
PRICES			
Price of standard LOF	\$32.37	\$31.96	\$31.52
Operators who offer basic, low-cost LOF service	31%	43%	33%
Operators who offer premium LOF (w/ specialty/high mileage motor oil)	92%	83%	87%
Operators who offer premium LOF (w/ synthetic motor oil)	98%	93%	97%
CUSTOMER DEMOGRAPHICS			
Fast lubes within three miles of respondent	2.6	1.8	2.6
Oil change facilities within three miles of respondent	5.4	7.2	5.2
Population within three-mile radius of best store	29,296	21,684	28,140
Daily traffic count in front of best store	21,207	28,881	21,509
Miles customers drive between oil changes	4,318	4,191	4,339
Customers who drive domestic vehicles	56%	53%	52%
Customers who drive foreign vehicles	44%	47%	48%
Customers who drive luxury vehicles	20%	22%	23%
Customers who drive light trucks	33%	29%	31%



OIL & EQUIPMENT

	NATIONAL	NORTHEAST	SOUTHEAST
Facilities using a filter crusher	29%	33%	28%
Operations that accept used oil from DIYers	85%	70%	77%
Operations that accept used oil filters from DIYers	66%	33%	57%
Operations that charge fee for accepting DIY used oil/oil filters	2%	7%	0%
Operations being paid for their used oil	95%	74%	96%
Amount per gallon	\$0.76	\$0.93	\$0.71
Operations being paid for their used oil filters	4%	8%	7%
Per-gallon cost of highest volume bulk oil	\$7.68	\$7.20	\$7.40
Overall breakdown of motor oil sales:			
Conventional	66%	67%	67%
Synthetic blend	8%	8%	5%
High mileage	9%	8%	9%
Full synthetic	10%	11%	10%
Diesel	7%	5%	8%
Other	0%	1%	1%

EMPLOYEES

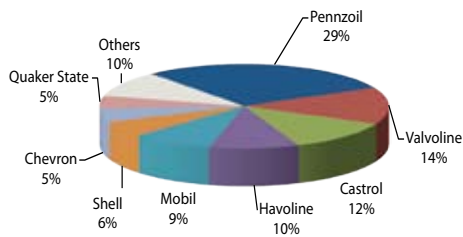
Length of employment for managers	6.2 yrs	7.1 yrs	6.0 yrs
Length of employment for technicians	2.5 yrs	2.6 yrs	2.7 yrs
Owners who work on site or from remote location: On site	69%	71%	65%
Remote	31%	29%	35%

ADVERTISING

Operators who advertise on the Internet	44%	33%	40%
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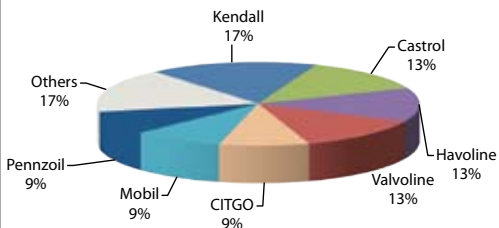
Best Selling Motor Oil in the United States

(Percent of companies reporting brand as "house" motor oil)



Best Selling Motor Oil in the Northeast

(Percent of companies reporting brand as "house" motor oil)



Best Selling Motor Oil in the Southeast

(Percent of companies reporting brand as "house" motor oil)

