

REGIONAL BREAKDOWN OF THE 2009 FAST LUBE OPERATORS SURVEY: NORTHEAST AND SOUTHEAST REGIONS

Northeast states include: Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont.

Southeast states include: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia and West Virginia.

OPERATIONS	NATIONAL AVG.	NORTHEAST	SOUTHEAST
Years in the fast lube business	12.4	12.2	13.4
Number of facilities per response	2.0	2.1	1.9
Cost of goods for standard, full-service LOF	\$13.24	\$12.20	\$13.25
Average ticket total	\$52.04	\$50.80	\$49.13
Number of cars serviced per day	32.4	37.9	31.2
Operators who own their building/land	52%	77%	85%
Operators who lease their building/land	26%	16%	13%
Operators who both own and lease their buildings/land	22%	7%	2%
Building/land costs for most recent fast lube (if owned)	\$552,545	\$512,500	\$462,759
Cost for leasing building/land (per month)	\$4,472	\$4,981	\$4,765
Equipment costs for fast lube	\$60,196	\$45,477	\$57,267
Annual gross sales per store	\$558,395	\$598,077	\$576,231
Average amount of per-store warranty work performed during preceding 12 months	\$971	\$862	\$882
Operators who have customers enter your lube: From the front (street side)	49%	46%	49%
Back	51%	54%	51%
Operators who offer a free fluid top-off	88%	64%	72%
PRICES			
Price of standard LOF	\$34.38	\$33.27	\$33.39
Operators who offer basic, low-cost LOF service	31%	38%	69%
Operators who offer premium LOF (w/ specialty/high mileage motor oil)	84%	94%	86%
Operators who offer premium LOF (w/ synthetic motor oil)	92%	100%	86%
CUSTOMER DEMOGRAPHICS			
Fast lubes within three miles of respondent	2.6	1.9	2.1
Oil change facilities within three miles of respondent	5.3	5.8	5.4
Population within three-mile radius of best store	20,837	20,767	14,197
Daily traffic count in front of best store	20,077	23,076	17,368
Miles customers drive between oil changes	4,364	4,380	4,365
Customers who drive domestic vehicles	58%	57%	55%
Customers who drive foreign vehicles	41%	43%	45%
Customers who drive luxury vehicles	18%	16%	21%
Customers who drive light trucks	35%	29%	35%

OIL & EQUIPMENT

	NATIONAL	NORTHEAST	SOUTHEAST
Facilities using a filter crusher	45%	63%	20%
Operations that accept used oil from DIYers	85%	92%	97%
Operations that accept used oil filters from DIYers	72%	48%	51%
Operations that charge fee for accepting DIY used oil/oil filters	2%	2%	*
Operations being paid for their used oil	96%	95%	56%
Amount per gallon	\$0.51	\$0.60	\$0.52
Operations being paid for their used oil filters	8%	2%	*
Per-gallon cost of highest volume bulk oil	\$7.96	\$7.58	\$8.29
Overall breakdown of motor oil sales: Conventional/synthetic blend	72%	70%	75%
High mileage	8%	7%	7%
Full synthetic	10%	12%	10%
Diesel	8%	6%	6%
Other	2%	5%	2%

EMPLOYEES

Length of employment for managers	6.7 yrs	7.5 yrs	8.4 yrs
Length of employment for technicians	2.9 yrs	3.4 yrs	3.3 yrs
Owners who work on site or from remote location: On site	73%	67%	78%
Remote	27%	33%	22%
Hourly rate paid to lube techs	\$9.30	\$9.68	\$9.02
Annual salary paid to managers	\$37,925	\$36,167	\$39,776
Annual salary paid to owners (if full-time employee)	\$58,719	\$54,800	\$53,080

ADVERTISING

Operators who advertise on the Internet	38%	29%	26%
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*Insufficient data to calculate

