

Regional Breakdown of the 2010 Fast Lube Operators Survey: Northeast and Southeast Regions

GENERAL

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	Northeast	Southeast
Years in the fast lube business	13.8	12.7	13.7
Number of facilities per response	2.3	1.6	2.8
Cost of goods for standard, full-service LOF	\$13.12	\$11.89	\$12.76
Average ticket total	\$54.08	\$53.40	\$53.59
Number of days open per year	318	325	309
Operators who own their building/land	56%	35%	60%
Operators who lease their building/land	18%	46%	12%
Operators who both own and lease their buildings/land	26%	19%	28%
Building/land costs for most recent fast lube (if owned)	\$604,372	\$593,857	\$540,970
Cost for leasing building/land (per month)	\$4,552	\$4,746	\$4,009
Equipment costs for fast lube	\$68,219	\$75,056	\$60,458
Operators who have customers enter their lube: From the front (street side)	54%	57%	53%
Back	46%	43%	47%
Operators who offer a free fluid top-off	89%	67%	88%
Yearly sales per store	\$575,422	\$659,855	\$554,534
Average amount of per-store warranty work performed during preceding 12 months	\$1,155	\$1,657	\$1,141

PRICES

Price of standard, full-service LOF/multipoint check	\$34.14	\$31.79	\$33.30
Operators who offer basic, low-cost LOF service	34%	57%	41%
Operators who offer premium LOF (w/ specialty/high mileage motor oil)	90%	94%	94%
Operators who offer premium LOF (w/ synthetic motor oil)	99%	100%	98%

DEMOGRAPHICS

Oil change facilities within three miles of respondent	8.5	10.6	9.0
Population within three-mile radius of best store	24,798	26,639	24,818
Daily traffic count in front of best store	23,381	25,853	23,810
Customer base that is female	52%	48%	55%
Miles customers drive between oil changes	4,419	4,644	4,291
Customers who drive domestic vehicles	58%	55%	55%
Customers who drive foreign vehicles	42%	45%	45%
Customers who drive luxury vehicles	19%	18%	19%
Customers who drive light trucks	35%	28%	34%

* insufficient data to calculate n/a: question not asked

EMPLOYEES

	National	Northeast	Southeast
Length of employment for managers	7.0 yrs	7.9 yrs	6.8 yrs
Length of employment for technicians	3.1 yrs	2.7 yrs	3.4 yrs
Hourly rate paid to lube techs	\$9.47	\$9.93	\$9.28
Annual salary paid to managers	\$39,456	\$41,889	\$39,141
Annual salary paid to owners (if full-time employee)	\$62,676	\$65,000	\$72,089
Owners who work: On site	72%	81%	67%
From remote location	28%	19%	33%

OIL & EQUIPMENT

Facilities using a filter crusher	33%	55%	29%
Operations that accept used oil from DIYers	87%	80%	96%
Operations that accept used oil filters from DIYers	73%	65%	77%
Operations that charge fee for accepting DIY oil/oil filters	2%	2%	0%
Operations being paid for their used oil	91%	92%	96%
Amount per gallon	\$0.53	\$0.53	\$0.55
Operations being paid for their used oil filters	4%	4%	1%
Per-gallon cost of highest volume bulk oil	\$7.66	\$6.56	\$7.49
Overall breakdown of motor oil sales:			
Conventional/synthetic blend	68%	73%	71%
High mileage	10%	10%	10%
Full synthetic	12%	12%	11%
Diesel	8%	3%	7%
Other	2%	2%	1%

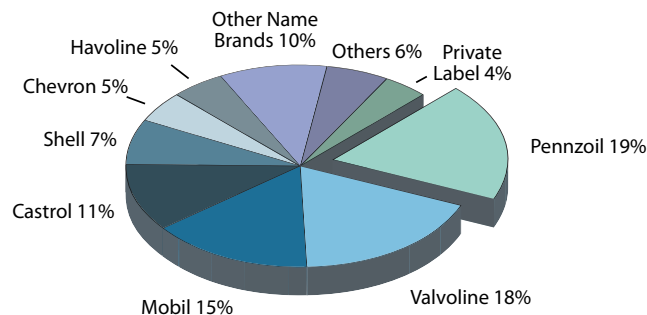
ADVERTISING

Operators who advertise on the Internet	54%	73%	49%
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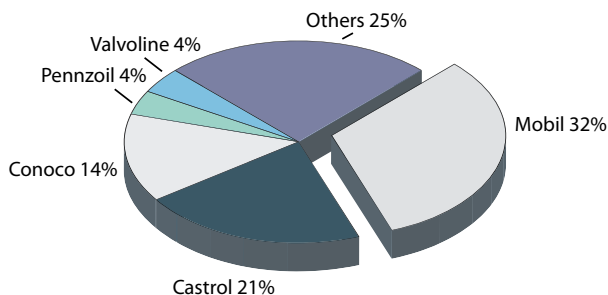
Best Selling Motor Oil in Fast Lubes (NATIONAL)

(Percentage of LT30 operators who listed each brand as their "house" oil, 2010)



Best Selling Motor Oil in Fast Lubes (NORTHEAST)

(Percentage of LT30 operators who listed each brand as their "house" oil, 2010)



Best Selling Motor Oil in Fast Lubes (SOUTHEAST)

(Percentage of LT30 operators who listed each brand as their "house" oil, 2010)

