



Regional Breakdown
of Fast Lube Operator's Survey:
(Northeast/Southeast States)

A special report by:



2011 Regional Breakdown of Fast Lube Operator's Survey (Northeast/Southeast States)

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. We received a small amount of responses from the Northeast region of the country; as a result, a large statistical variance may occur.

operations

	National	Northeast	Southeast
Years in the fast lube business	13.2	14.1	11.3
Number of facilities per response	2.6	1.8	3.0
Cost of goods for standard, full-service LOF	\$15.33	\$14.97	\$16.02
Average ticket total	\$56.29	\$51.77	\$55.57
Number of days open per year	317	313	313
Operators who own their building/land	40%	64%	27%
Operators who lease their building/land	30%	28%	48%
Operators who both own and lease their buildings/land	30%	8%	25%
Building/land costs for most recent fast lube (if owned)	\$634,774	\$557,222	\$604,710
Cost for leasing building/land (per month)	\$4,349	\$4,439	\$4,342
Equipment costs for fast lube	\$64,485	\$62,633	\$64,727
Operators who have customers enter their lube: From the front (street side)	52%	45%	58%
Back	48%	55%	42%
Operators who offer a free fluid top-off	81%	58%	89%
Yearly sales per store	\$601,164	\$756,272	\$526,682
Average amount of per-store warranty work performed during preceding 12 months	\$1,047	\$1,660	\$1,027

prices

Price of standard, full-service LOF/multipoint check	\$35.03	\$33.43	\$34.14
Operators who offer basic, low-cost LOF service	38%	37%	49%
Price, if offered	\$28.06	\$28.18	\$27.47
Operators who offer premium LOF (w/ specialty/high mileage motor oil)	89%	76%	84%
Price, if offered	\$48.71	\$48.73	\$49.13
Operators who offer premium LOF (w/ synthetic motor oil)	95%	81%	100%
Price, if offered	\$65.86	\$66.51	\$66.48

demographics

Oil change facilities within three miles of respondent	8.6	9.4	9.2
Population within three-mile radius of best store	26,288	22,690	30,000
Daily traffic count in front of best store	22,625	21,555	25,059
Customer base that is female	52%	55%	52%
Miles customers drive between oil changes	4,520	4,702	4,486
Customers who drive domestic vehicles	55%	55%	53%
Customers who drive foreign vehicles	45%	45%	47%
Customers who drive luxury vehicles	18%	18%	20%
Customers who drive light trucks	35%	33%	36%

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

employees

	National	Northeast	Southeast
Length of employment for managers	6.8 yrs	5.2 yrs	6.3 yrs
Length of employment for technicians	3.4 yrs	2.6 yrs	2.9 yrs
Hourly rate paid to lube techs	\$9.75	\$9.71	\$9.57
Annual salary paid to managers	\$40,650	\$44,113	\$40,177
Annual salary paid to owners (if full-time employee)	\$51,700	\$67,286	\$54,600
Owners who work: On site	65%	72%	46%
From remote location	35%	28%	54%

oil & equipment

Operations that accept used oil from DIYers	91%	93%	96%
Operations that accept used oil filters from DIYers	70%	19%	80%
Operations that charge fee for accepting DIY oil/oil filters	5%	4%	3%
Operations being paid for their used oil	96%	89%	98%
Amount per gallon	\$0.94	\$0.78	\$1.00
Operations being paid for their used oil filters	5%	8%	1%
Per-gallon cost of highest volume bulk oil	\$8.65	\$7.69	\$8.72
Overall breakdown of motor oil sales:			
Conventional/synthetic blend	70%	69%	70%
High mileage	10%	12%	12%
Full synthetic	11%	13%	10%
Diesel	8%	5%	7%
Other	1%	1%	1%

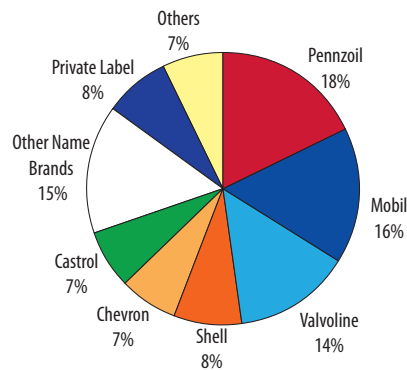
advertising

Operators who advertise on the Internet	62%	57%	64%
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*insufficient data to calculate n/a: question not asked

Best Selling Motor Oil in Fast Lubes

(Percentage of LT30 operators that listed each brand as their "house" oil, 2011)



Best Selling Motor Oil in Fast Lubes (SOUTHEAST)

(Percentage of LT30 operators that listed each brand as their "house" oil, 2011)

