

2018 FAST LUBE OPERATOR SURVEY RESULTS, PART THREE

GENERAL

The Fast Lube Operator Survey is one of the most in-depth studies of the fast oil change industry available. Much-requested by both newcomers to the fast lube industry and seasoned operators — who use it to evaluate the success of their own operations — the survey contains both current and historical data for many operational metrics. Survey data was gathered from questionnaires, via phone interviews, online and mailed directly to operators. The responses for the 2018 Fast Lube Operator Survey account for 1,700 facilities and include shops operating in all 50 states. NOLN has noticed the industry does not share data like in years past. The majority of this year’s survey participants were made up of owners operating one to three stores. Also, NOLN did not get participation from franchises on a corporate level like in years past. A special thanks goes to Valvoline for sponsoring this year’s Operator Survey.

SHOP PROFILE

	2018
Job title that best describes respondent	
Owner	59%
Manager	34%
Corporate Official	6%
Technician	1%
Statements that are true for respondent’s business	
50% or more of my revenue comes from oil changes and quick maintenance services (45 min. or less)	67%
I have a carwash	16%
Statements that are true for respondent’s business (cont.)	
My stores are independent	35%
My stores are franchised	57%
I buy my products independently	78%
I buy products through my franchise program	28%
Years in business	32 years
Average number of bays	7

SHOP PROFILE (CONT.)

2018

Where customers wait

In their cars	42%
In the waiting room.....	66%

Respondents answered this survey with

Actual numbers from system-generated reports.....	56%
Estimates based on their experience	44%

SALES

2018

Total annual gross sales:

Less than \$500,000	3%
\$500,000-\$1 million.....	35%
\$1 million-\$2 million.....	5%
More than \$2 million.....	57%

Percentage of gross sales used for:

Payroll	27%
Lease/Mortgage	11%
Cost of Goods.....	23%
Operations.....	20%
Net Profit (before taxes)	17%
Other	2%

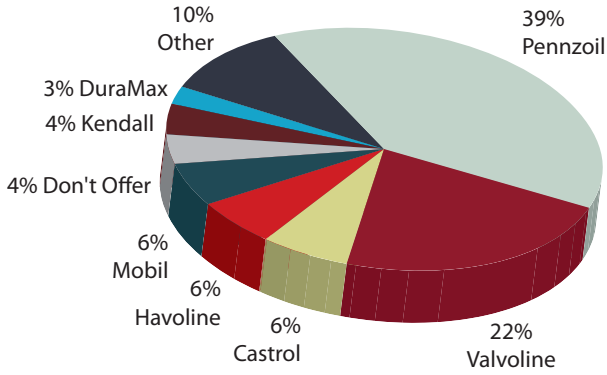
SERVICES

	% of respondents who offer:	2018 Avg. charge:	Avg. % of service performed (in relation to number of oil changes):
Additive sales.....	79%		
ATF supplement additive.....	44%	\$17.03.....	3%
Chemical engine flush/oil system cleaner additive.....	73%	\$36.39.....	3%
Coolant stop-leak additive	20%	\$29.80.....	<1%
Coolant treatment additive	37%	\$29.16.....	n/a
Diesel fuel supplement/cleaner additive	34%	\$22.62.....	3%
Gear oil supplement additive	40%	\$16.49.....	3%

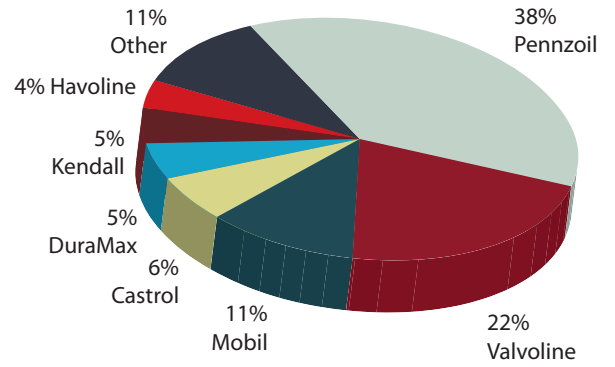
SERVICES

	% of respondents who offer:	2018 Avg. charge:	Avg. % of service performed (in relation to number of oil changes):
Oil stop-leak additive	29%	\$14.75	4%
Pour-in fuel injector cleaner additive	80%	\$22.70	5%
Power steering treatment additive.....	32%	\$27.86	2%
Transmission stop-leak additive	24%	\$16.61	1%
Air filter replacement	100%	\$21.40	19%
Brake pad replacement	66%	\$188.29	7%
Brake fluid flush	42%	\$87.86	3%
Cabin air filter replacement.....	95%	\$31.34	9%
Differential service	91%	\$69.79	3%
Fuel filter replacement	78%	\$58.35	5%
Headlight restoration	54%	\$59.02	2%
Lightbulb replacement.....	90%	n/a	8%
Mechanical ATF exchange	77%	\$140.32	5%
Mechanical full-block coolant flushes	72%	\$95.16	4%
Minor mechanical repairs.....	72%	n/a	15%
Multi-part fuel system cleaning.....	70%	\$83.02	3%
Power steering flushes	65%	\$72.99	3%
Radiator, heater, A/C hose replacement	53%	n/a	4%
Rock chip windshield repair	4%	n/a	2%
Sell batteries	80%	n/a	5%
Serpentine belt replacement	79%	\$83.85	n/a
Shock replacement.....	57%	n/a	2%
Smog checks/emissions testing	20%	\$34.55	n/a
Strut replacement	51%	n/a	2%
Tire rotation	78%	\$20.10	11%
Tire sales	42%	n/a	16%
Transmission service (drain/refill manually)	51%	\$147.75	5%
Wheel alignment	39%	\$84.29	6%
Wheel balancing	51%	\$30.27	7%
Wiper blades (beam)	87%	\$30.12	7%
Wiper blades (conventional)	100%	\$17.67	10%

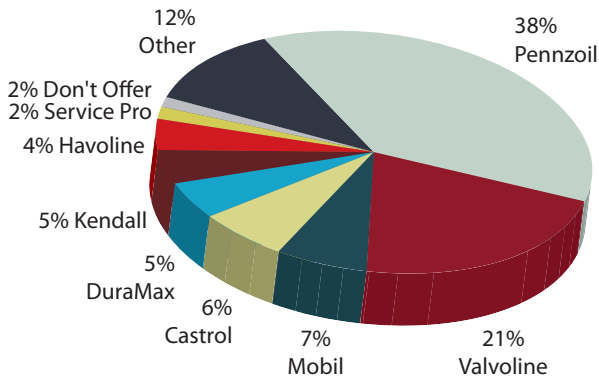
Best Selling Conventional Oil



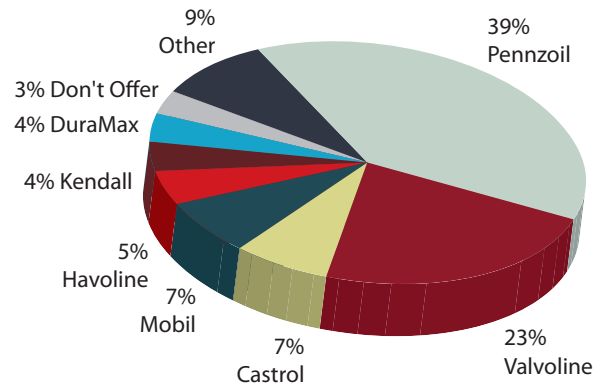
Best Selling Synthetic Motor Oil



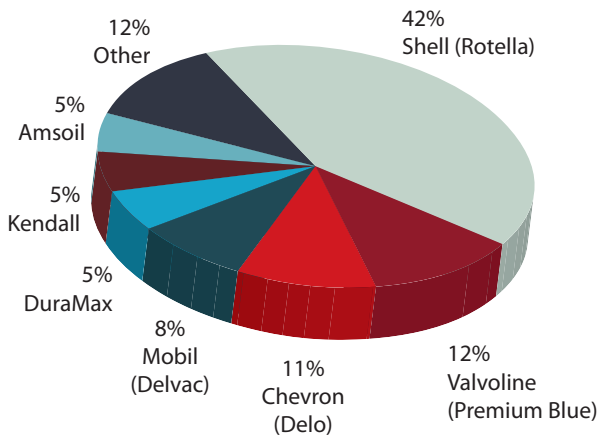
Best Selling Synthetic-Blend Oil



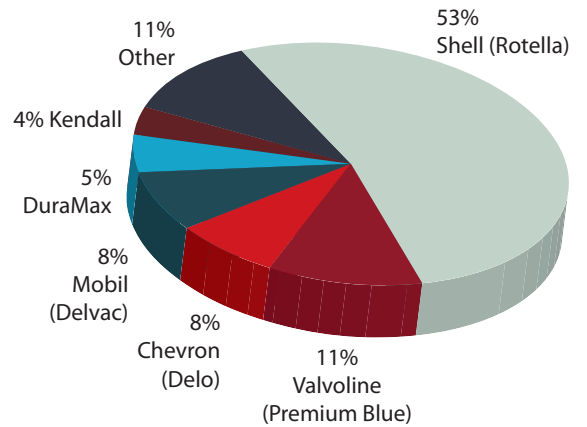
Best Selling High-Mileage Oil



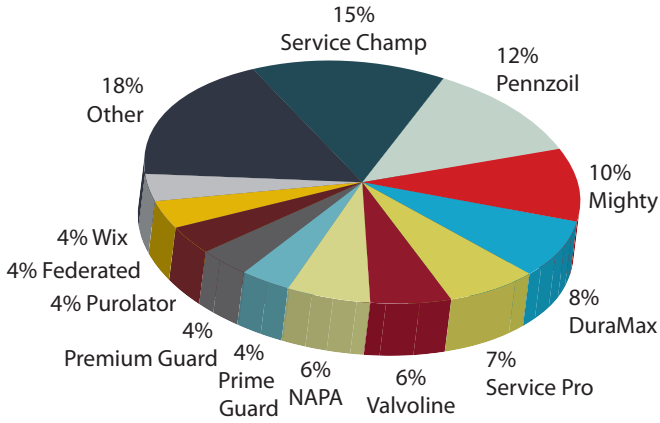
Best Selling 5W-40 Diesel Oil



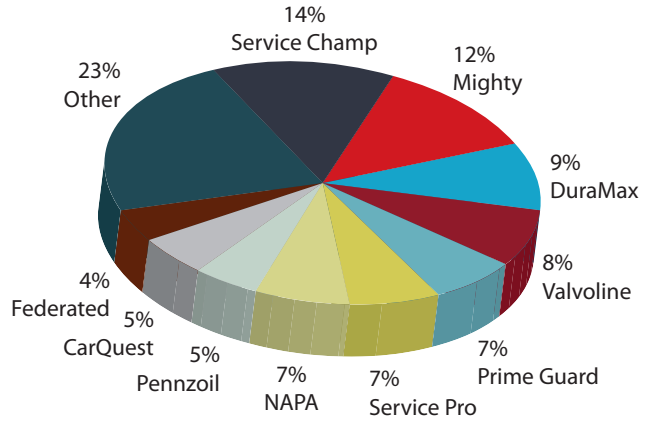
Best Selling 15W-40 Diesel Oil



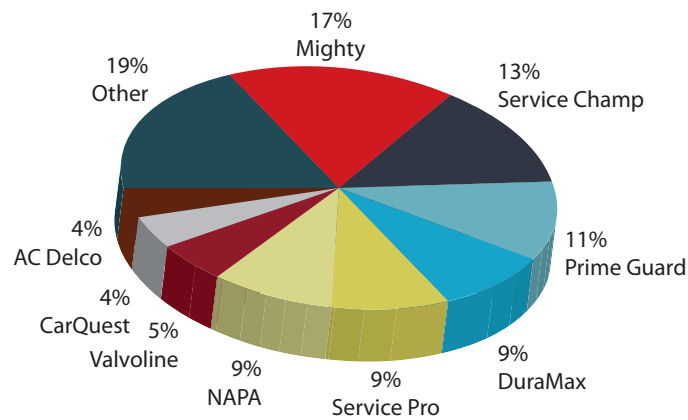
Best Selling Oil Filter



Best Selling Air Filter



Best Selling Cabin Air Filter



PRODUCED BY



2018