

2026

# OPERATOR SURVEY REPORT

SPONSORED BY



## TABLE OF CONTENTS

|    |                                |
|----|--------------------------------|
| 2  | INTRODUCTION                   |
| 3  | GET TO KNOW<br>THE RESPONDENTS |
| 4  | SHOP OWNERS                    |
| 6  | OPERATIONS                     |
| 8  | WORKFORCE                      |
| 10 | FACILITIES                     |
| 11 | FINANCIALS                     |
| 13 | SERVICES                       |
| 14 | MARKETING AND<br>SOCIAL MEDIA  |
| 16 | CUSTOMERS                      |
| 18 | OIL                            |
| 21 | REGIONAL SNAPSHOT              |
| 30 | INDUSTRY OUTLOOK               |

## METHODOLOGY

The 2026 NOLN Operator Survey was conducted from Feb. 17 to April 16, 2026. Responses were collected online using a third-party platform. More than 175 responses were collected, with participation from all 50 states and from quick lube and fast automotive maintenance businesses of all sizes, from independent single-shop operators to those with more than 20 facilities in their portfolio. Participants ranged from professionals who have entered the industry within the past year to industry veterans who indicated they are looking to exit within the next 12 months.

## TAKING STOCK OF THE STATE OF THE INDUSTRY

Over the past four decades, NOLN has seen and reported on a lot of trends, breakthroughs, major deals, and milestone moments in the quick lube industry. Since 1988, one of the cornerstones of our coverage has been the annual NOLN Operator Survey Report. Each year, we take the pulse of the industry by giving quick lube owners, partners, presidents, managers, supervisors, and other industry professionals a platform to weigh in on issues relevant to their business.

From staffing and facilities to service offerings and car counts, the NOLN Operator Survey gives readers insight into how their shops measure up with those of their peers and competitors.

We appreciate those who took the time to participate in this year's installment to provide insight into their operations. For 2026, we have added new questions to learn more about the owners and operators who lead the nation's quick lube facilities. We have also refined several questions from past years to paint a more precise picture on the state of the industry.

We are excited to share our survey's findings with you, our readers, and we hope the data provided here helps guide you toward becoming the industry's next success story.

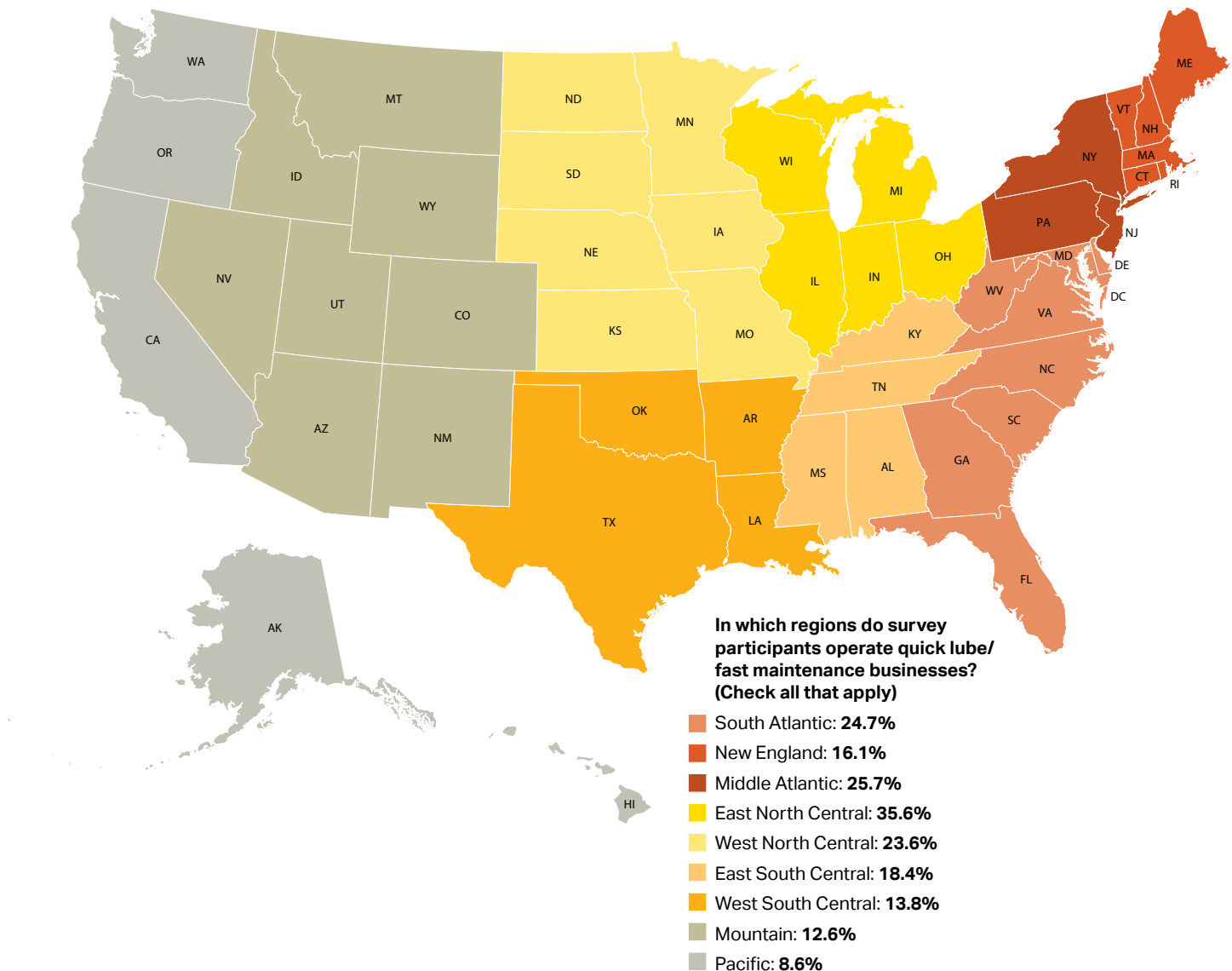
— **Tom Valentino**, Editor, National Oil and Lube News

## GET TO KNOW THE RESPONDENTS

For the 2026 Operator Survey, NOLN divided respondents into groups consistent with the nine geographic regions used by the U.S. Census Bureau. Distribution of survey responses was fairly consistent across regions. This year, the East North Central region (Illinois, Indiana, Michigan, Ohio, and Wisconsin) accounted for 35.6% of the responses collected, the most of any region. The Pacific (Alaska, California, Hawaii, Oregon, and Washington) had the smallest share of responses at 8.6%. However, California had the largest share of NOLN Operator Survey participants of any individual state, with 25.6%. All 50 states once again are represented in the survey this year.

In terms of the number of shops operators oversee, operators with between 5 and 9 shops had a plurality among survey participants, accounting for 30.7% of responses. Meanwhile, just 4.6% of respondents said they oversee 21 or more shops.

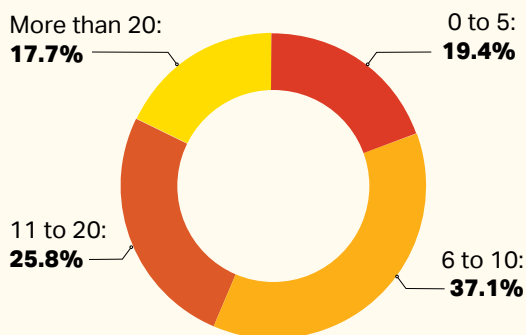
Owners, partners, and presidents accounted for 43.7% of survey replies, and service managers, shop managers, and general managers/service writers represented 45.2%.



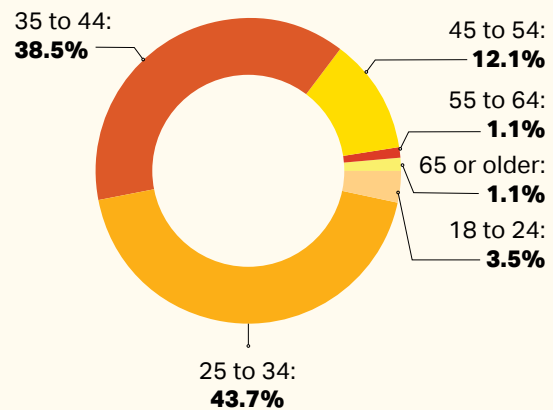
## SHOP OWNERS

The following findings are based on responses from Operator Survey participants who identified as a shop owner, partner, or president.

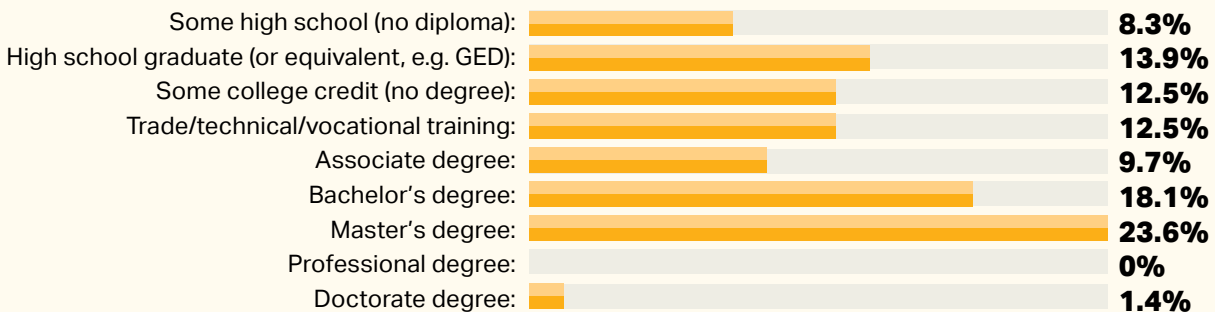
### HOW MANY YEARS HAVE YOU BEEN IN THE QUICK LUBE BUSINESS?



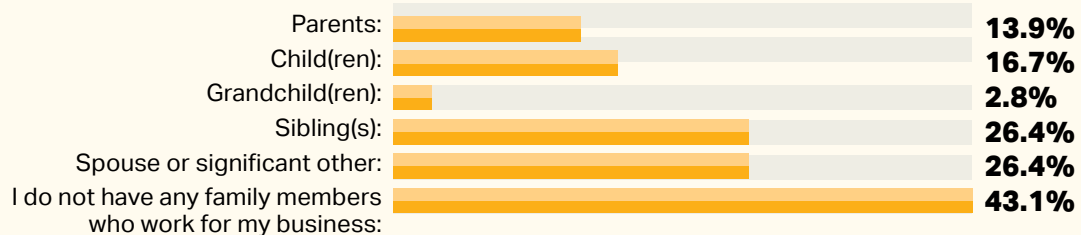
### AT WHAT AGE DID YOU BECOME A SHOP OWNER?

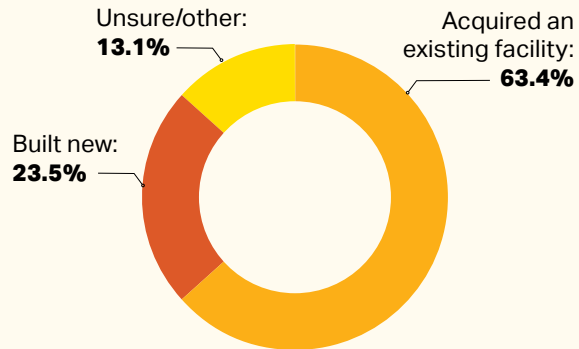
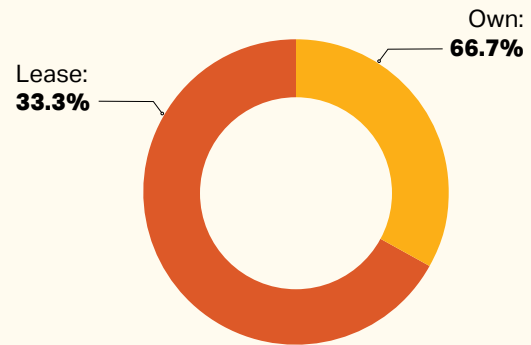
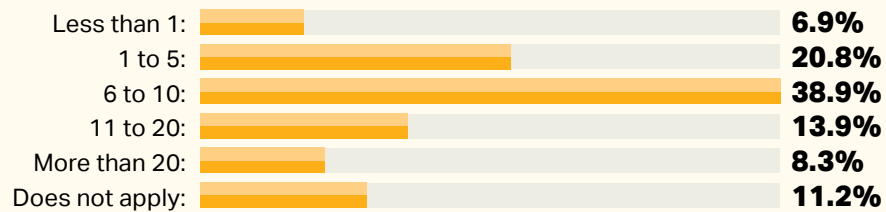


### WHAT IS YOUR HIGHEST LEVEL OF EDUCATION?



### DO YOU HAVE ANY FAMILY MEMBERS WORKING FOR YOUR BUSINESS? (CHECK ALL THAT APPLY)

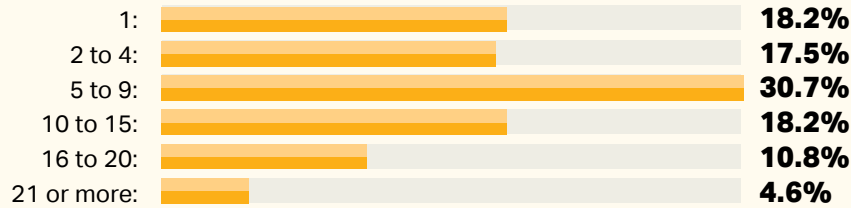


**FOR THE MAJORITY OF  
YOUR SHOPS, HAVE YOU:****DO YOU OWN OR LEASE  
YOUR BUILDING AND PROPERTY?****IF YOU ARE THINKING ABOUT SELLING,  
HOW MANY YEARS DO YOU EXPECT TO CONTINUE OPERATING?**

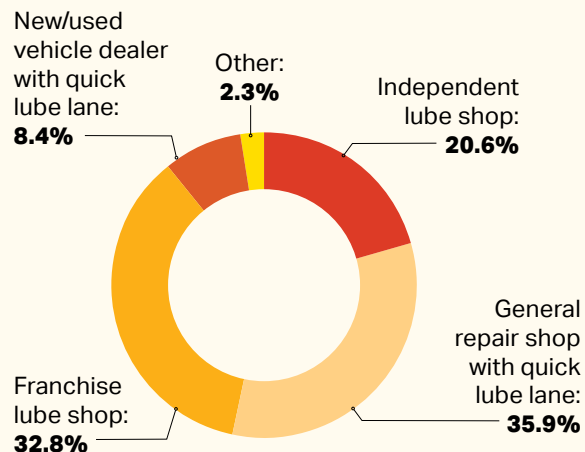
## OPERATIONS

Everyday components of the average shop

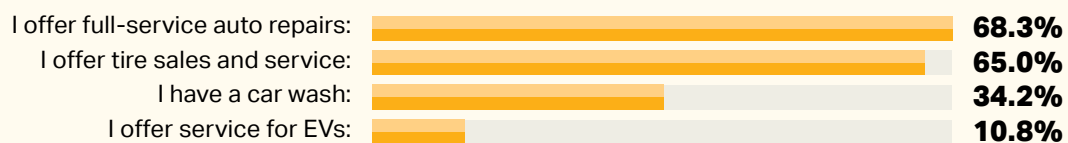
### HOW MANY SHOPS DO YOU OPERATE?



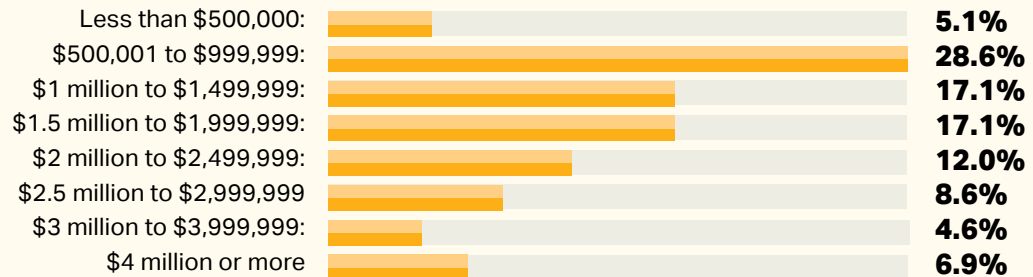
### WHICH OF THE FOLLOWING BEST DESCRIBES YOUR OPERATION?



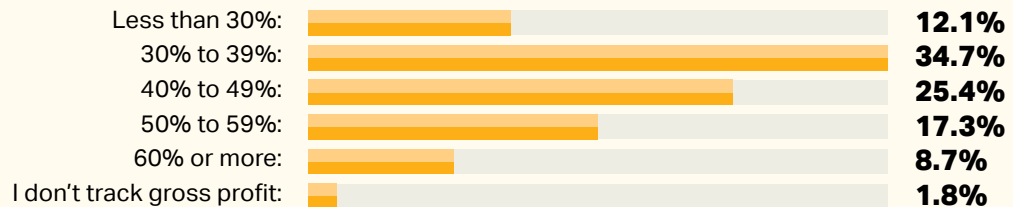
### SELECT STATEMENTS THAT ARE TRUE FOR YOUR BUSINESS (CHECK ALL THAT APPLY):



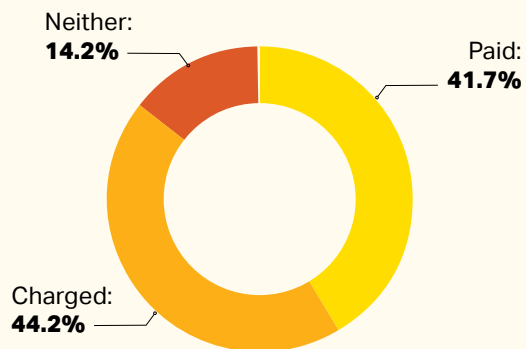
### WHAT ARE YOUR ANNUAL GROSS SALES FOR THE ENTIRE OPERATION?



### WHAT IS YOUR OVERALL GROSS PROFIT MARGIN?

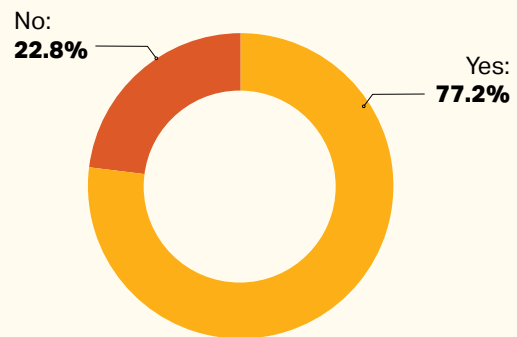


### WHEN IT COMES TO USED OIL PICKUP, ARE YOU:



If paid, **51.3%** say it is by the gallon and **48.7%** are paid by the load.

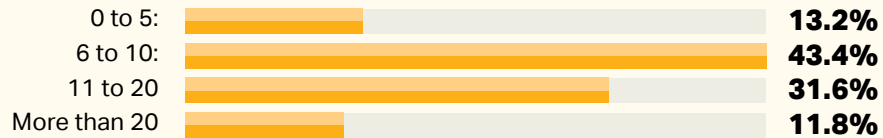
### ARE YOU BEING CHARGED FOR USED OIL FILTER DISPOSAL?



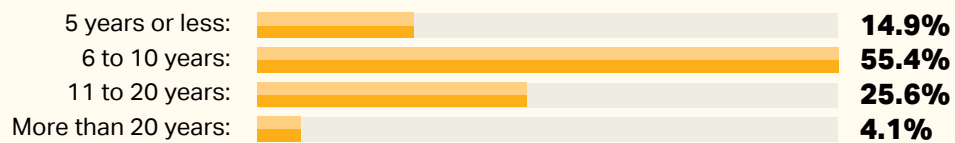
## THE WORKFORCE

The industry representatives with boots on the ground

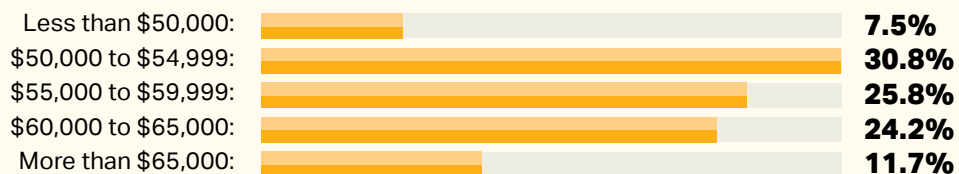
### ALL EMPLOYEES: HOW MANY YEARS HAVE YOU BEEN IN THE QUICK LUBE BUSINESS?



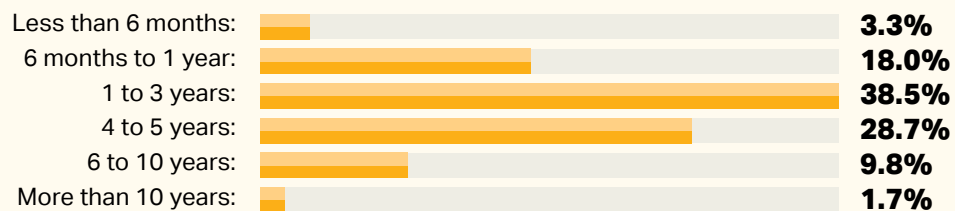
### MANAGERS: AVERAGE EXPERIENCE

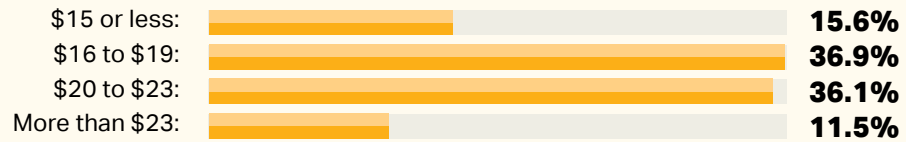
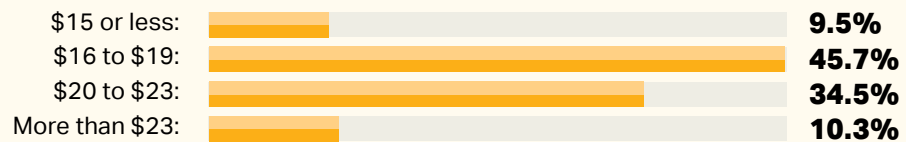
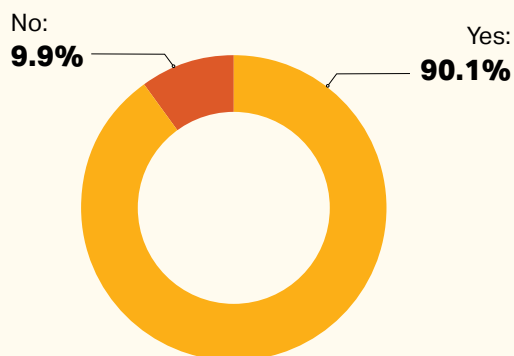
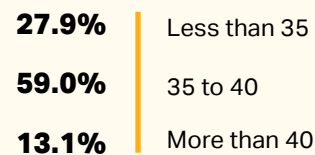


### MANAGERS: AVERAGE ANNUAL SALARY



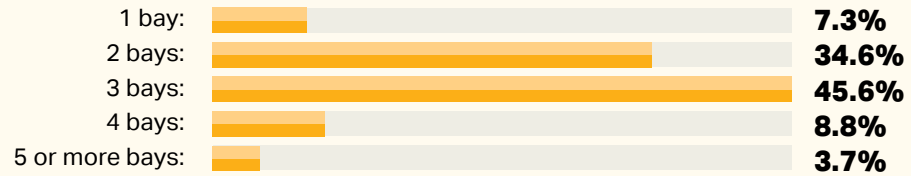
### LUBE TECHS: AVERAGE EXPERIENCE



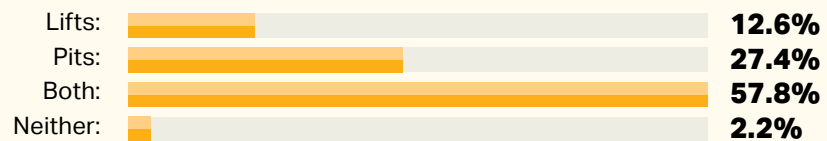
**LUBE TECHS: AVERAGE STARTING HOURLY WAGE****LUBE TECHS: AVERAGE HOURLY WAGE FOR ALL LUBE TECHS****LUBE TECHS: DO YOU GIVE A COMMISSION/ BONUS TO TECHS?****LUBE TECHS: WHAT IS THE AVERAGE NUMBER OF HOURS A TECH WORKS PER WEEK?**

## FACILITIES

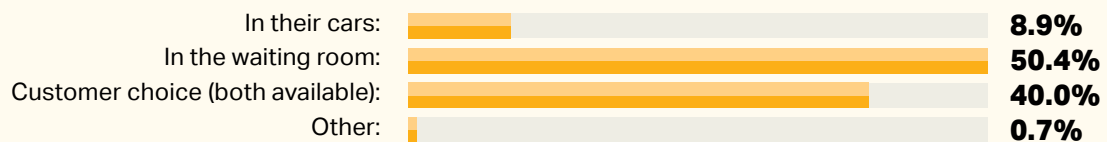
### IN A TYPICAL SINGLE SHOP, HOW MANY QUICK MAINTENANCE BAYS DO YOU HAVE?



### DO YOU HAVE LIFTS, PITS, OR BOTH?

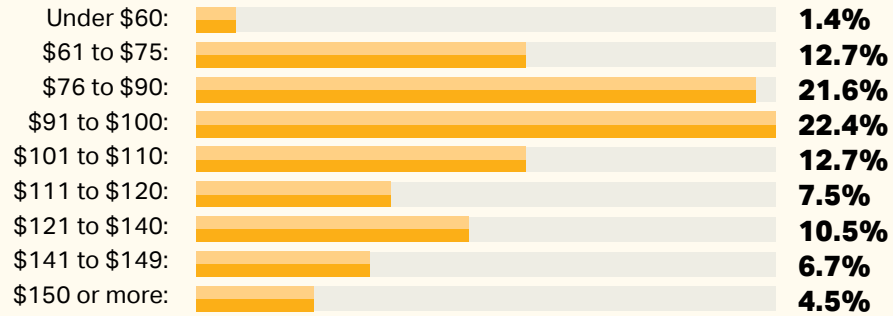


### WHERE DO CUSTOMERS WAIT?

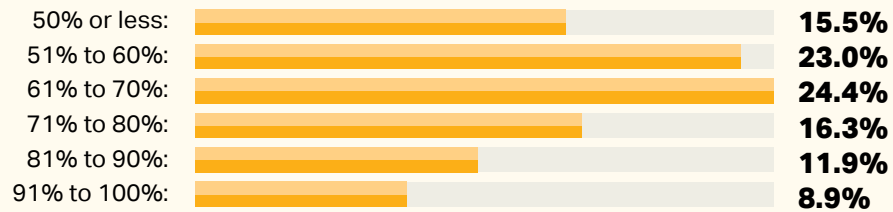


## FINANCIALS

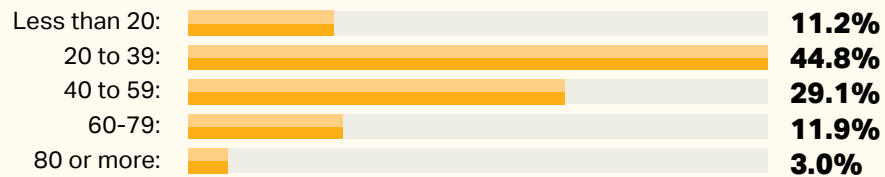
### WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?



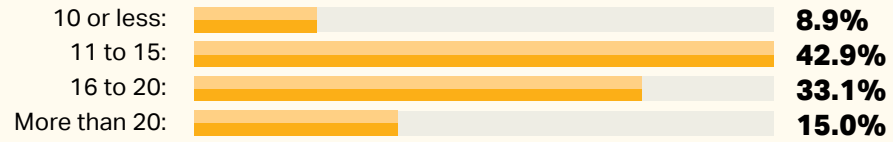
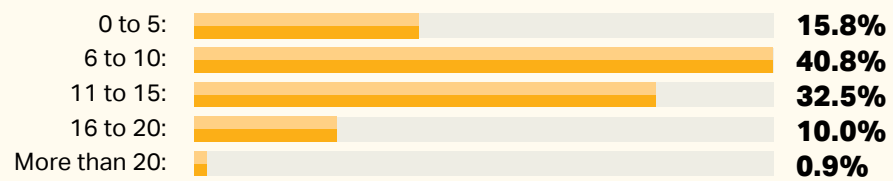
### WHAT PERCENTAGE OF YOUR GROSS ANNUAL SALES ARE COMPRISED SOLELY OF QUICK MAINTENANCE SERVICES?



### WHAT IS THE TOTAL NUMBER OF CARS PER FACILITY YOU SERVICE EACH DAY AT A SINGLE AVERAGE STORE?



*Editor's Note: Most responses to the 2026 NOLN Operator Survey were collected before the conflict in the Middle East began affecting quick lube operations, including changes in product costs, fuel prices, and other business conditions.*

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?****EMPLOYEES PER STORE:**

## SERVICES

### WHAT ARE YOUR TOP SELLING ADD-ON SERVICES?

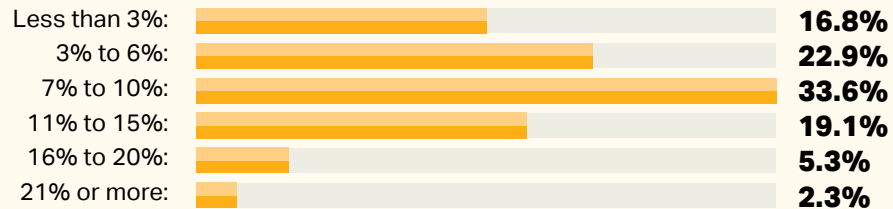
- Additives
- ATF exchange/transmission service
- Belts
- Cabin air filters
- Differential
- Engine air filters
- Fuel injection cleaning
- Radiator flush
- Tire rotation
- Wiper blades

*(List in alphabetical order)*

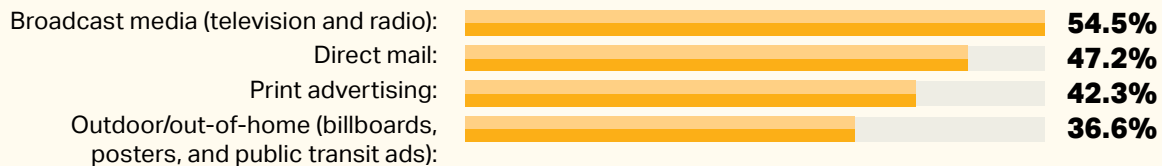


## MARKETING AND SOCIAL MEDIA

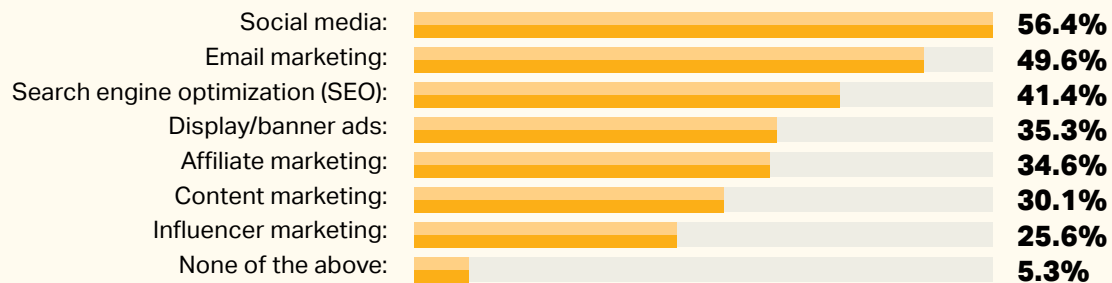
### WHAT PERCENTAGE OF YOUR REVENUE IS SPENT ON MARKETING?



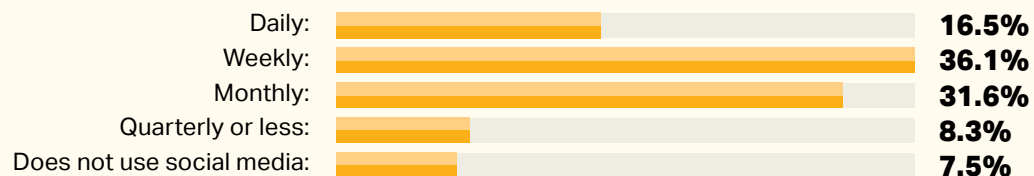
### WHICH OF THE FOLLOWING TRADITIONAL MARKETING CHANNELS DO YOU USE? (CHECK ALL THAT APPLY)



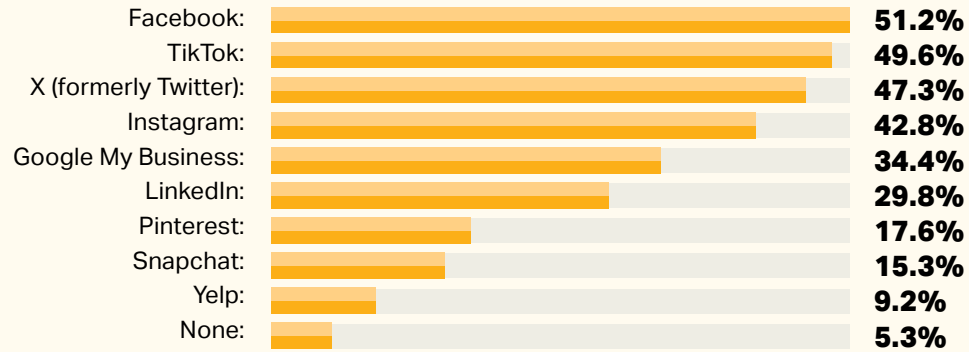
### WHICH DIGITAL MARKETING CHANNELS DO YOU USE? (CHECK ALL THAT APPLY)



### HOW OFTEN DOES YOUR SHOP PROMOTE ITSELF THROUGH SOCIAL MEDIA?



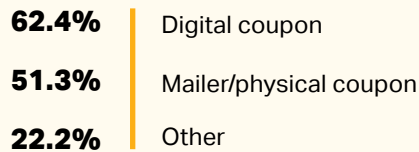
### WHICH OF THE FOLLOWING PLATFORMS DO YOU USE? (CHECK ALL THAT APPLY)



### COUPONS AND DISCOUNTS (CHECK ALL THAT APPLY):

**90.2%** of shops offer discount coupons or programs to customers

Discounts are offered via (select all that apply):

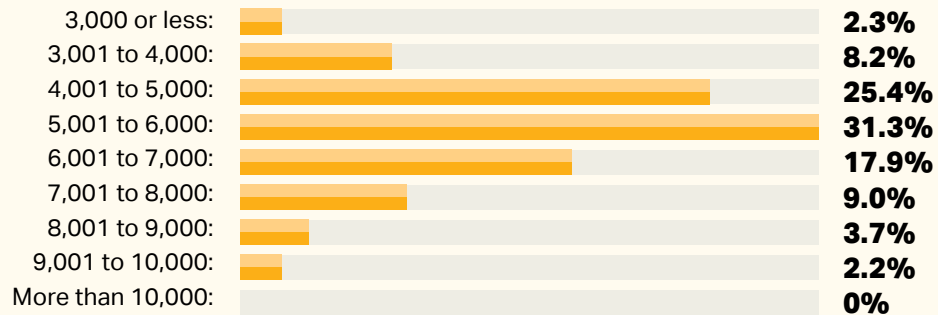


### TYPICAL DISCOUNT OFFERED:



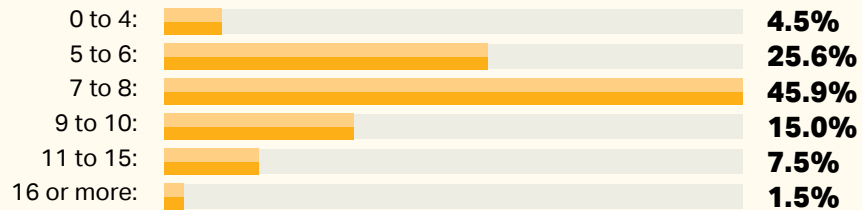
## CUSTOMERS

### AVERAGE NUMBER OF MILES DRIVEN BETWEEN OIL CHANGES:



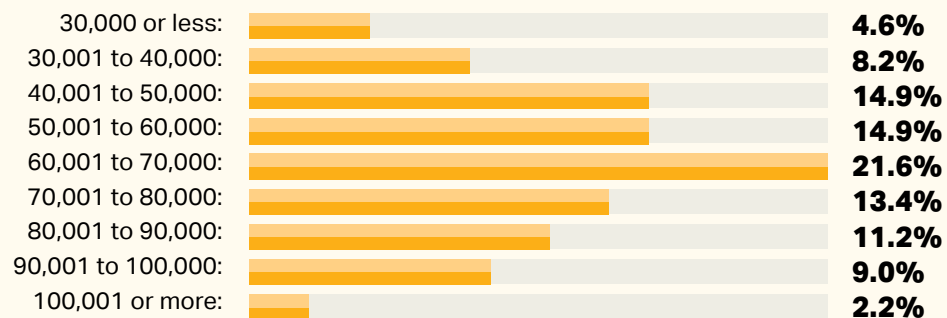
Overall average: 5,508

### AVERAGE VEHICLE AGE (IN YEARS):

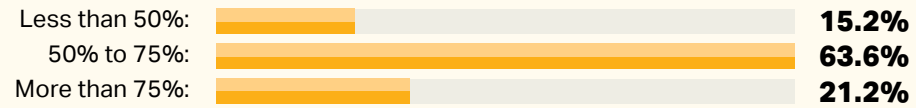
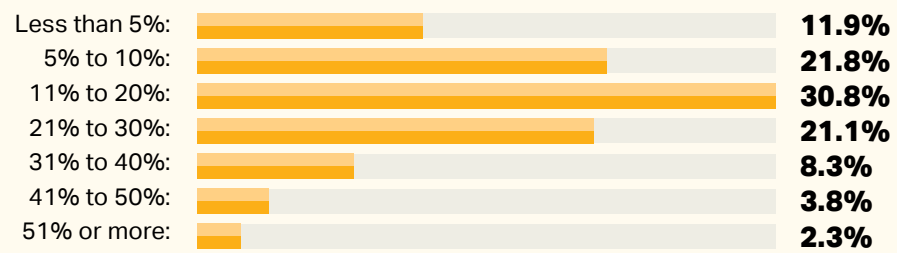


Overall average: 7.6 years

### AVERAGE MILES ON A CUSTOMER VEHICLE:

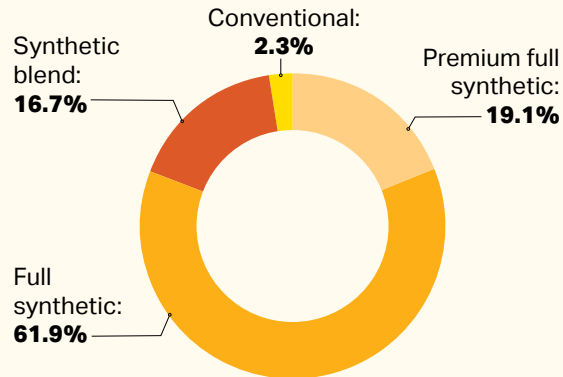


Overall average: 62,100

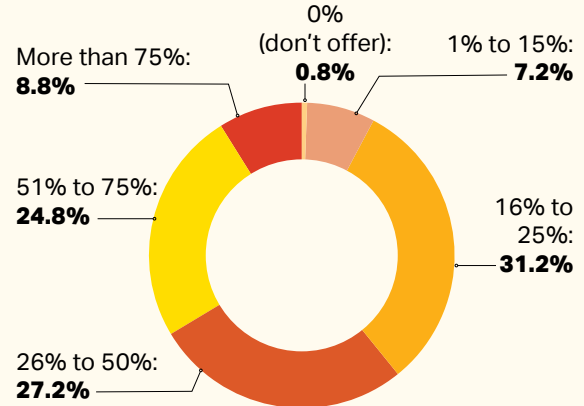
**WHAT PERCENTAGE OF YOUR BUSINESS IS REPEAT CUSTOMERS?****WHAT PERCENTAGE OF YOUR BUSINESS IS FLEET BUSINESS?**

## OIL

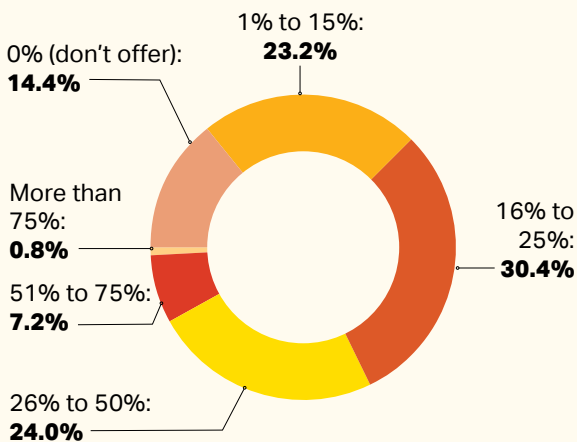
### WHAT IS YOUR MAIN BULK OIL (MOST USED)?



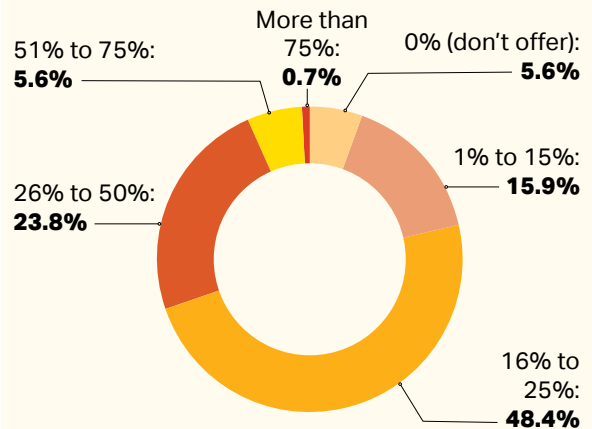
### WHAT PERCENTAGE OF YOUR OIL CHANGES ARE WITH FULL SYNTHETIC OIL?



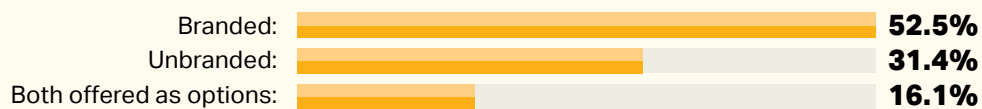
### WHAT PERCENTAGE OF YOUR OIL CHANGES ARE WITH CONVENTIONAL OIL?



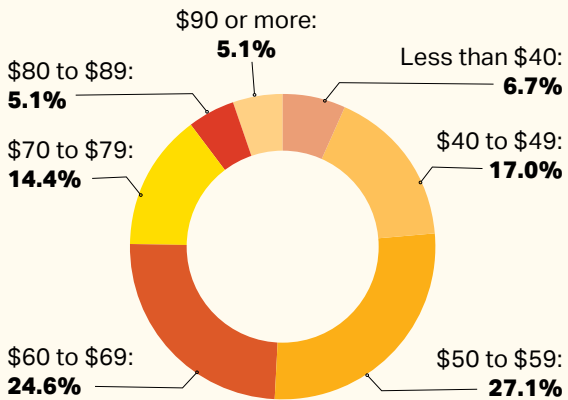
### WHAT PERCENTAGE OF YOUR OIL CHANGES ARE WITH SYNTHETIC BLEND OIL?



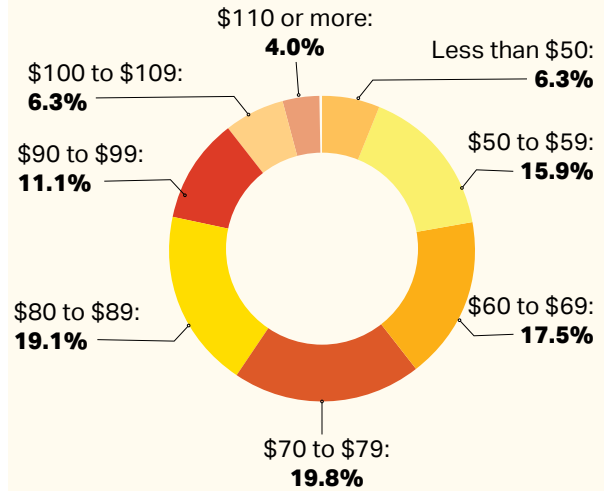
### DOES YOUR SHOP USE BRANDED OR UNBRANDED OIL?



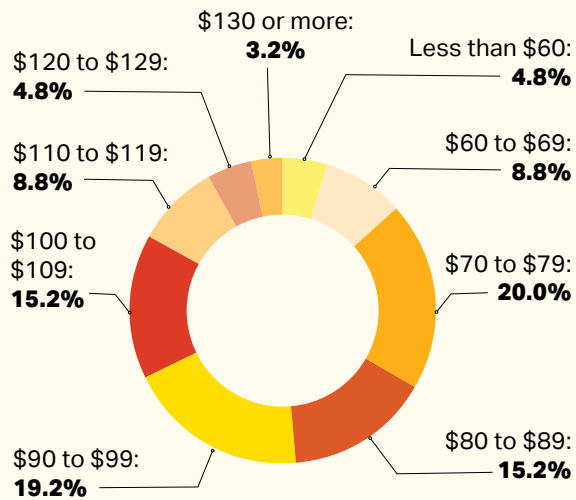
**WHAT IS THE RETAIL COST  
TO CUSTOMERS FOR AN OIL CHANGE  
WITH CONVENTIONAL OIL?**



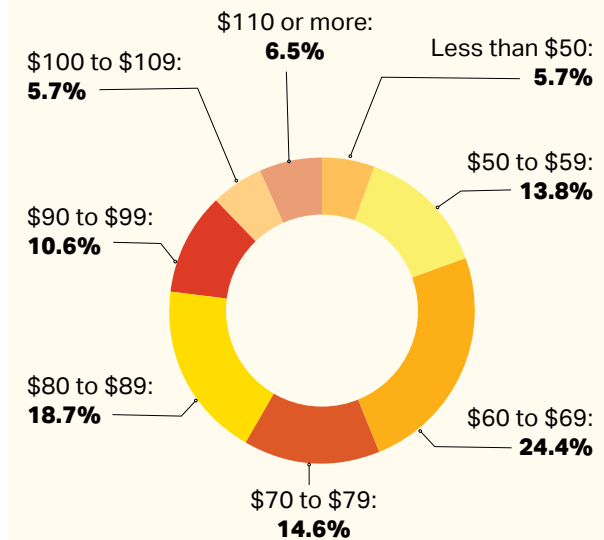
**WHAT IS THE RETAIL COST  
TO CUSTOMERS FOR AN OIL CHANGE  
WITH SYNTHETIC BLEND OIL?**

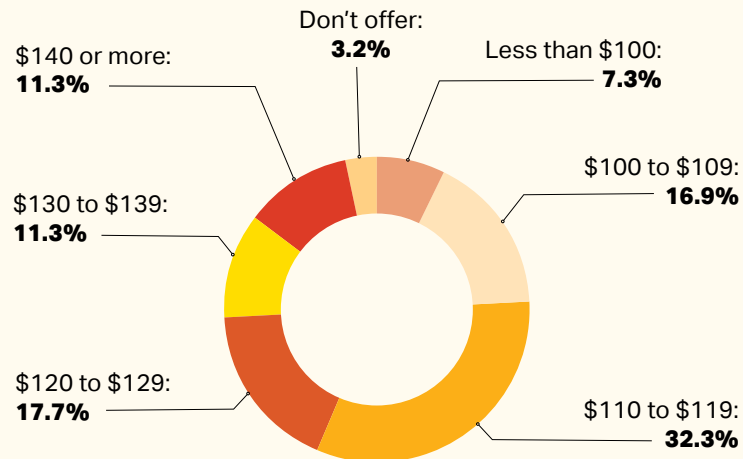
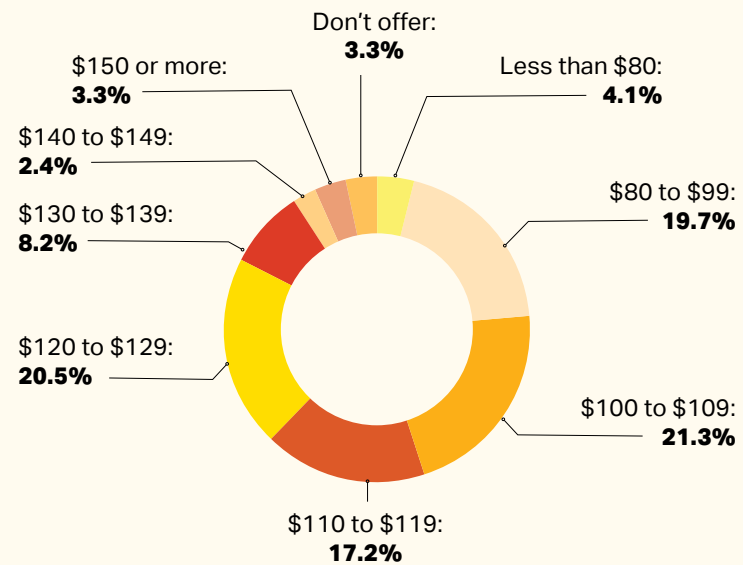


**WHAT IS THE RETAIL COST  
TO CUSTOMERS FOR AN OIL CHANGE  
WITH FULL SYNTHETIC OIL?**

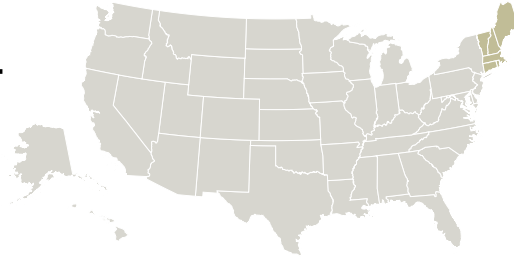


**WHAT IS THE RETAIL COST  
TO CUSTOMERS FOR AN OIL CHANGE  
WITH SYNTHETIC BLEND OIL?**



**HOW MUCH DO YOU CHARGE FOR  
A DIESEL OIL CHANGE ON A PICKUP TRUCK OR VAN?****HOW MUCH DO YOU CHARGE FOR  
A DIESEL OIL CHANGE ON A PASSENGER VEHICLE?**

## REGIONAL SNAPSHOT



### NEW ENGLAND (CT, ME, MA, NH, RI, VT)

#### WHICH OF THE FOLLOWING BEST DESCRIBES YOUR OPERATION?

|              |                                              |
|--------------|----------------------------------------------|
| <b>13.0%</b> | Independent lube shop                        |
| <b>21.7%</b> | Franchise lube shop                          |
| <b>52.3%</b> | General repair shop with quick lube lane     |
| <b>13.0%</b> | New/used vehicle dealer with quick lube lane |
| <b>0%</b>    | Other                                        |

#### WHAT IS THE TOTAL NUMBER OF CARS PER FACILITY YOU SERVICE EACH DAY AT A SINGLE AVERAGE STORE?

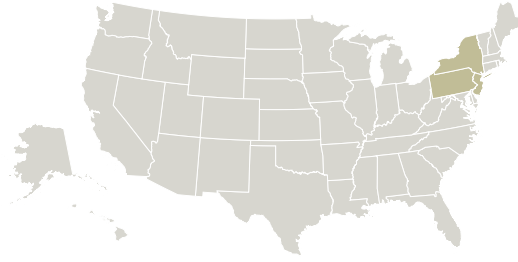
|              |              |
|--------------|--------------|
| <b>4.5%</b>  | Less than 20 |
| <b>31.8%</b> | 20 to 39     |
| <b>45.5%</b> | 40 to 59     |
| <b>18.2%</b> | 60-79        |
| <b>0%</b>    | 80 or more   |

#### WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?

|                 |              |
|-----------------|--------------|
| Under \$60:     | <b>0%</b>    |
| \$61 to \$75:   | <b>4.4%</b>  |
| \$76 to \$90:   | <b>30.4%</b> |
| \$91 to \$100:  | <b>21.7%</b> |
| \$101 to \$110: | <b>17.4%</b> |
| \$111 to \$120: | <b>0%</b>    |
| \$121 to \$140: | <b>8.7%</b>  |
| \$141 to \$149: | <b>8.7%</b>  |
| \$150 or more:  | <b>8.7%</b>  |

#### WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?

|               |              |
|---------------|--------------|
| 10 or less:   | <b>13.0%</b> |
| 11 to 15:     | <b>34.9%</b> |
| 16 to 20:     | <b>39.1%</b> |
| More than 20: | <b>13.0%</b> |


**MIDDLE ATLANTIC (NJ, NY, PA)**
**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>6.9%</b>  | Independent lube shop                           |
| <b>41.4%</b> | Franchise lube shop                             |
| <b>44.8%</b> | General repair shop<br>with quick lube lane     |
| <b>6.9%</b>  | New/used vehicle dealer<br>with quick lube lane |
| <b>0%</b>    | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

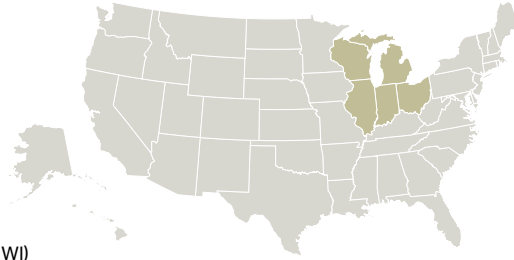
|              |              |
|--------------|--------------|
| <b>12.8%</b> | Less than 20 |
| <b>32.3%</b> | 20 to 39     |
| <b>35.5%</b> | 40 to 59     |
| <b>19.4%</b> | 60-79        |
| <b>0%</b>    | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |              |
|-----------------|--------------|
| Under \$60:     | <b>0%</b>    |
| \$61 to \$75:   | <b>12.8%</b> |
| \$76 to \$90:   | <b>16.1%</b> |
| \$91 to \$100:  | <b>32.3%</b> |
| \$101 to \$110: | <b>19.4%</b> |
| \$111 to \$120: | <b>3.2%</b>  |
| \$121 to \$140: | <b>6.5%</b>  |
| \$141 to \$149: | <b>6.5%</b>  |
| \$150 or more:  | <b>3.2%</b>  |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

|               |              |
|---------------|--------------|
| 10 or less:   | <b>10.0%</b> |
| 11 to 15:     | <b>43.3%</b> |
| 16 to 20:     | <b>40.0%</b> |
| More than 20: | <b>6.7%</b>  |



### EAST NORTH CENTRAL (IL, IN, MI, OH, WI)

#### WHICH OF THE FOLLOWING BEST DESCRIBES YOUR OPERATION?

|              |                                              |
|--------------|----------------------------------------------|
| <b>14.0%</b> | Independent lube shop                        |
| <b>34.9%</b> | Franchise lube shop                          |
| <b>48.8%</b> | General repair shop with quick lube lane     |
| <b>2.3%</b>  | New/used vehicle dealer with quick lube lane |
| <b>0%</b>    | Other                                        |

#### WHAT IS THE TOTAL NUMBER OF CARS PER FACILITY YOU SERVICE EACH DAY AT A SINGLE AVERAGE STORE?

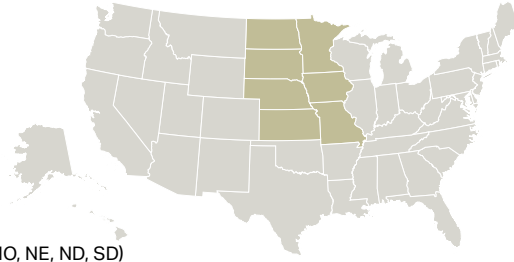
|              |              |
|--------------|--------------|
| <b>9.3%</b>  | Less than 20 |
| <b>48.8%</b> | 20 to 39     |
| <b>32.6%</b> | 40 to 59     |
| <b>9.3%</b>  | 60-79        |
| <b>0%</b>    | 80 or more   |

#### WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?

|                 |  |              |
|-----------------|--|--------------|
| Under \$60:     |  | <b>2.4%</b>  |
| \$61 to \$75:   |  | <b>16.7%</b> |
| \$76 to \$90:   |  | <b>16.7%</b> |
| \$91 to \$100:  |  | <b>31.0%</b> |
| \$101 to \$110: |  | <b>7.0%</b>  |
| \$111 to \$120: |  | <b>9.5%</b>  |
| \$121 to \$140: |  | <b>4.8%</b>  |
| \$141 to \$149: |  | <b>9.5%</b>  |
| \$150 or more:  |  | <b>2.4%</b>  |

#### WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?

|               |  |              |
|---------------|--|--------------|
| 10 or less:   |  | <b>9.5%</b>  |
| 11 to 15:     |  | <b>47.7%</b> |
| 16 to 20:     |  | <b>33.3%</b> |
| More than 20: |  | <b>9.5%</b>  |


**WEST NORTH CENTRAL** (IA, KS, MN, MO, NE, ND, SD)

**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>17.3%</b> | Independent lube shop                           |
| <b>37.9%</b> | Franchise lube shop                             |
| <b>41.4%</b> | General repair shop<br>with quick lube lane     |
| <b>3.4%</b>  | New/used vehicle dealer<br>with quick lube lane |
| <b>0%</b>    | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

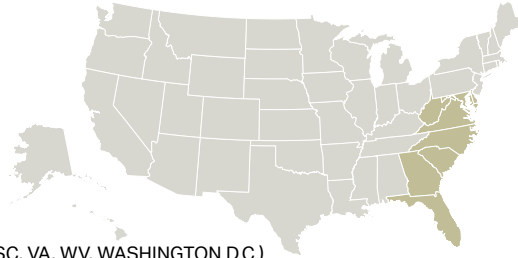
|              |              |
|--------------|--------------|
| <b>6.7%</b>  | Less than 20 |
| <b>36.7%</b> | 20 to 39     |
| <b>30.0%</b> | 40 to 59     |
| <b>23.3%</b> | 60-79        |
| <b>3.3%</b>  | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |              |
|-----------------|--------------|
| Under \$60:     | <b>0%</b>    |
| \$61 to \$75:   | <b>23.2%</b> |
| \$76 to \$90:   | <b>16.7%</b> |
| \$91 to \$100:  | <b>26.7%</b> |
| \$101 to \$110: | <b>13.3%</b> |
| \$111 to \$120: | <b>6.7%</b>  |
| \$121 to \$140: | <b>6.7%</b>  |
| \$141 to \$149: | <b>0%</b>    |
| \$150 or more:  | <b>6.7%</b>  |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

|               |              |
|---------------|--------------|
| 10 or less:   | <b>10.0%</b> |
| 11 to 15:     | <b>46.7%</b> |
| 16 to 20:     | <b>33.3%</b> |
| More than 20: | <b>10.0%</b> |


**SOUTH ATLANTIC** (DE, FL, GA, MD, NC, SC, VA, WV, WASHINGTON D.C.)

**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>17.6%</b> | Independent lube shop                           |
| <b>41.2%</b> | Franchise lube shop                             |
| <b>29.4%</b> | General repair shop<br>with quick lube lane     |
| <b>5.9%</b>  | New/used vehicle dealer<br>with quick lube lane |
| <b>5.9%</b>  | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

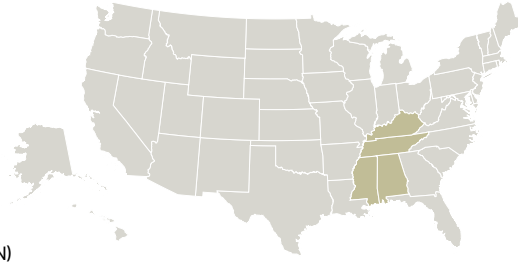
|              |              |
|--------------|--------------|
| <b>8.8%</b>  | Less than 20 |
| <b>41.2%</b> | 20 to 39     |
| <b>38.2%</b> | 40 to 59     |
| <b>5.9%</b>  | 60-79        |
| <b>5.9%</b>  | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |  |              |
|-----------------|--|--------------|
| Under \$60:     |  | <b>2.9%</b>  |
| \$61 to \$75:   |  | <b>15.2%</b> |
| \$76 to \$90:   |  | <b>12.1%</b> |
| \$91 to \$100:  |  | <b>33.3%</b> |
| \$101 to \$110: |  | <b>15.2%</b> |
| \$111 to \$120: |  | <b>6.1%</b>  |
| \$121 to \$140: |  | <b>9.1%</b>  |
| \$141 to \$149: |  | <b>6.1%</b>  |
| \$150 or more:  |  | <b>0%</b>    |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

|               |  |              |
|---------------|--|--------------|
| 10 or less:   |  | <b>15.6%</b> |
| 11 to 15:     |  | <b>40.6%</b> |
| 16 to 20:     |  | <b>37.5%</b> |
| More than 20: |  | <b>6.3%</b>  |


**EAST SOUTH CENTRAL** (AL, KY, MS, TN)

**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>3.4%</b>  | Independent lube shop                           |
| <b>34.6%</b> | Franchise lube shop                             |
| <b>58.6%</b> | General repair shop<br>with quick lube lane     |
| <b>3.4%</b>  | New/used vehicle dealer<br>with quick lube lane |
| <b>0%</b>    | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

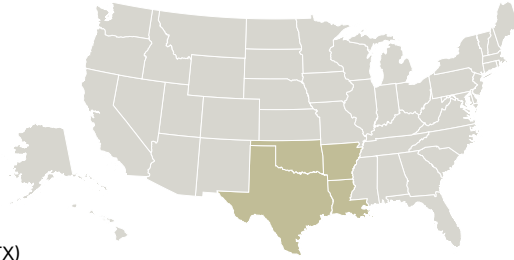
|              |              |
|--------------|--------------|
| <b>14.3%</b> | Less than 20 |
| <b>35.7%</b> | 20 to 39     |
| <b>39.3%</b> | 40 to 59     |
| <b>10.7%</b> | 60-79        |
| <b>0%</b>    | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |              |
|-----------------|--------------|
| Under \$60:     | <b>3.4%</b>  |
| \$61 to \$75:   | <b>17.2%</b> |
| \$76 to \$90:   | <b>20.7%</b> |
| \$91 to \$100:  | <b>24.1%</b> |
| \$101 to \$110: | <b>10.4%</b> |
| \$111 to \$120: | <b>10.4%</b> |
| \$121 to \$140: | <b>10.4%</b> |
| \$141 to \$149: | <b>0%</b>    |
| \$150 or more:  | <b>3.4%</b>  |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

|               |              |
|---------------|--------------|
| 10 or less:   | <b>20.7%</b> |
| 11 to 15:     | <b>44.8%</b> |
| 16 to 20:     | <b>27.6%</b> |
| More than 20: | <b>6.9%</b>  |


**WEST SOUTH CENTRAL** (AR, LA, OK, TX)

**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>21.0%</b> | Independent lube shop                           |
| <b>42.1%</b> | Franchise lube shop                             |
| <b>26.3%</b> | General repair shop<br>with quick lube lane     |
| <b>5.3%</b>  | New/used vehicle dealer<br>with quick lube lane |
| <b>5.3%</b>  | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

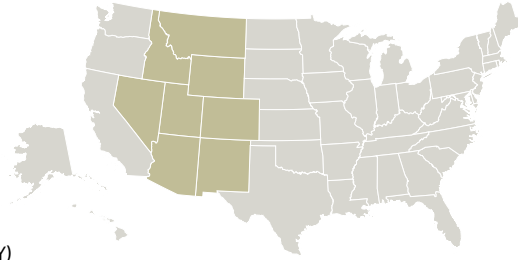
|              |              |
|--------------|--------------|
| <b>21.1%</b> | Less than 20 |
| <b>36.8%</b> | 20 to 39     |
| <b>36.8%</b> | 40 to 59     |
| <b>5.3%</b>  | 60-79        |
| <b>0%</b>    | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |             |              |
|-----------------|-------------|--------------|
| Under \$60:     | <div></div> | <b>5.5%</b>  |
| \$61 to \$75:   | <div></div> | <b>27.8%</b> |
| \$76 to \$90:   | <div></div> | <b>16.7%</b> |
| \$91 to \$100:  | <div></div> | <b>16.7%</b> |
| \$101 to \$110: | <div></div> | <b>27.8%</b> |
| \$111 to \$120: | <div></div> | <b>0%</b>    |
| \$121 to \$140: | <div></div> | <b>5.5%</b>  |
| \$141 to \$149: | <div></div> | <b>0%</b>    |
| \$150 or more:  | <div></div> | <b>0%</b>    |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

|               |             |              |
|---------------|-------------|--------------|
| 10 or less:   | <div></div> | <b>21.0%</b> |
| 11 to 15:     | <div></div> | <b>42.1%</b> |
| 16 to 20:     | <div></div> | <b>31.6%</b> |
| More than 20: | <div></div> | <b>5.3%</b>  |


**MOUNTAIN** (AZ, CO, ID, MT, NV, NM, UT, WY)

**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>14.3%</b> | Independent lube shop                           |
| <b>33.3%</b> | Franchise lube shop                             |
| <b>38.1%</b> | General repair shop<br>with quick lube lane     |
| <b>14.3%</b> | New/used vehicle dealer<br>with quick lube lane |
| <b>0%</b>    | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

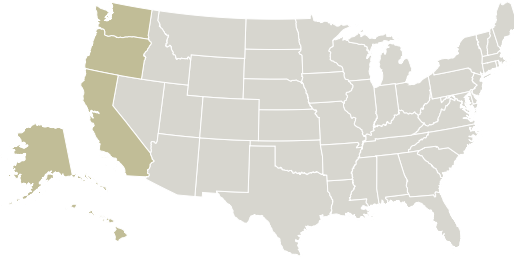
|              |              |
|--------------|--------------|
| <b>20.0%</b> | Less than 20 |
| <b>45.0%</b> | 20 to 39     |
| <b>25.0%</b> | 40 to 59     |
| <b>10.0%</b> | 60-79        |
| <b>0%</b>    | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |              |
|-----------------|--------------|
| Under \$60:     | <b>0%</b>    |
| \$61 to \$75:   | <b>14.3%</b> |
| \$76 to \$90:   | <b>14.3%</b> |
| \$91 to \$100:  | <b>23.7%</b> |
| \$101 to \$110: | <b>4.8%</b>  |
| \$111 to \$120: | <b>9.5%</b>  |
| \$121 to \$140: | <b>28.6%</b> |
| \$141 to \$149: | <b>4.8%</b>  |
| \$150 or more:  | <b>0%</b>    |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

|               |              |
|---------------|--------------|
| 10 or less:   | <b>5.0%</b>  |
| 11 to 15:     | <b>45.0%</b> |
| 16 to 20:     | <b>25.0%</b> |
| More than 20: | <b>25.0%</b> |


**PACIFIC** (AK, CA, HI, OR, WA)

**WHICH OF THE FOLLOWING  
BEST DESCRIBES YOUR OPERATION?**

|              |                                                 |
|--------------|-------------------------------------------------|
| <b>33.3%</b> | Independent lube shop                           |
| <b>33.3%</b> | Franchise lube shop                             |
| <b>16.7%</b> | General repair shop<br>with quick lube lane     |
| <b>16.7%</b> | New/used vehicle dealer<br>with quick lube lane |
| <b>0%</b>    | Other                                           |

**WHAT IS THE TOTAL NUMBER OF CARS  
PER FACILITY YOU SERVICE EACH DAY  
AT A SINGLE AVERAGE STORE?**

|              |              |
|--------------|--------------|
| <b>0%</b>    | Less than 20 |
| <b>76.9%</b> | 20 to 39     |
| <b>15.4%</b> | 40 to 59     |
| <b>7.7%</b>  | 60-79        |
| <b>0%</b>    | 80 or more   |

**WHAT IS YOUR AVERAGE PER-CAR TICKET TOTAL FOR QUICK MAINTENANCE SERVICES?**

|                 |              |
|-----------------|--------------|
| Under \$60:     | <b>0%</b>    |
| \$61 to \$75:   | <b>15.4%</b> |
| \$76 to \$90:   | <b>15.4%</b> |
| \$91 to \$100:  | <b>23.0%</b> |
| \$101 to \$110: | <b>15.4%</b> |
| \$111 to \$120: | <b>7.7%</b>  |
| \$121 to \$140: | <b>7.7%</b>  |
| \$141 to \$149: | <b>7.7%</b>  |
| \$150 or more:  | <b>7.7%</b>  |

**WHAT IS YOUR AVERAGE BAY TIME FOR QUICK MAINTENANCE SERVICES (IN MINUTES)?**

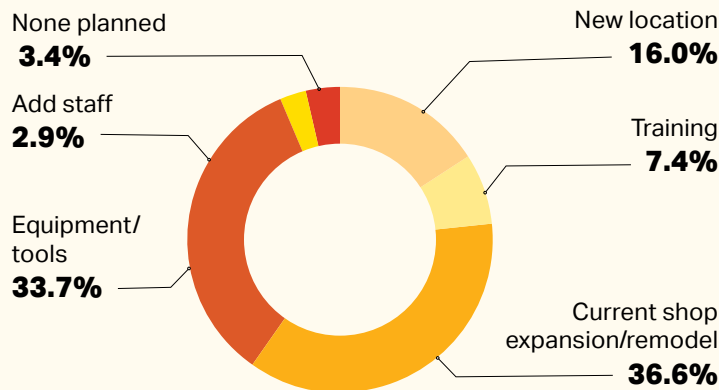
|               |              |
|---------------|--------------|
| 10 or less:   | <b>7.6%</b>  |
| 11 to 15:     | <b>38.5%</b> |
| 16 to 20:     | <b>30.8%</b> |
| More than 20: | <b>23.1%</b> |

## INDUSTRY OUTLOOK

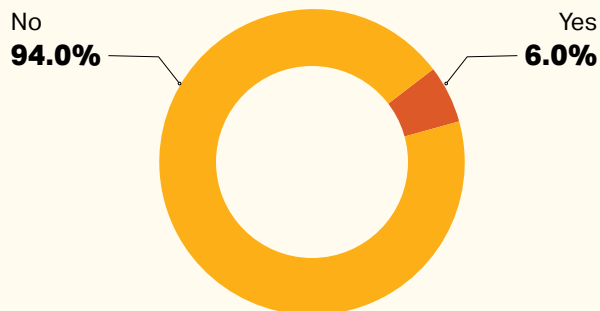
To conclude the 2026 NOLN Operator Survey, NOLN once again asked respondents about the biggest challenges they are facing, as well as planned investments in their business in the coming years. Current shop expansion/remodel (36.6% of respondents) and purchasing equipment and tools (33.7%) were the two most popular selections among the provided options for potential investments, showing more operators are prioritizing making improvements to their existing facilities and infrastructure than those who are considering expansion.

Among the most common concerns among operators, hiring and availability of labor once again claimed the top spot, chosen by 34.3% of survey participants. This year, however, extended service intervals (34.3%) climbed to the No. 2 spot. Meanwhile, market saturation (33.1%) moved into the top three for the first time.

### WHAT'S HIGHEST ON YOUR LIST OF PLANNED INVESTMENTS?

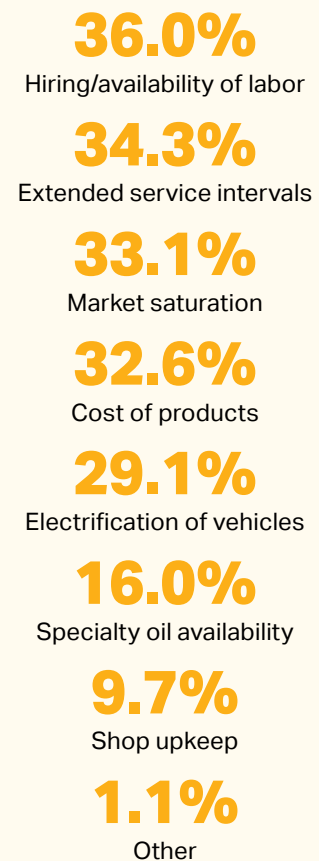


### WILL YOU BE ADDING A NEW SERVICE IN THE NEXT 12 MONTHS?



Services that respondents are planning to add included: Tire rotation, quick refueling facilities, electrical and technology service, after-sales and maintenance services, subscription-based maintenance plans, mobile service units, extended warranties and insurance packages, additives, and a "reserved rack" program for immediate availability for customers.

### WHAT'S THE BIGGEST CHALLENGE FACING YOUR OPERATION?



\*In this section, some of the challenges mentioned by respondents included consolidation, advanced electronics, and the elimination/potential elimination of emissions testing programs.