NOLN 2026 Operator Survey: Key Takeaways for Operators

The NOLN 2026 Operator Survey points to a generally healthy quick-lube market, but one in which scale and supply-chain access are becoming increasingly important. The survey primarily reflects the perspective of small and independent operators: only seven of approximately 175 respondents, or 4.6%, operated chains with 21 or more locations

Survey Context

Approximately half of respondents operated independent or franchised quick-lube locations. The balance consisted of general repair facilities with quick-lube lanes and vehicle dealerships with quick-lube operations.

Accordingly, the results are best viewed as an indicator of conditions among smaller and regional operators rather than a direct representation of the large national chains. The comparison below highlights several structural differences between these groups

Operating Model Differences

Category	Small/Independent Operators	National Quick Lube Chain
Service Delivery	About 50% of respondents offer a waiting room, while roughly 40% give customers a choice between remaining in the vehicle and waiting inside	Typically emphasize a stay-in-car experience
Average ticket	Median ticket of approximately $90–$100	Typically higher
Oil-change revenue mix	45% of respondents derive 51%–70% of revenue from oil-change services.	Typically derive approximately 70%–80% of revenue from oil-change services, depending on the chain
Car count	45% process 20–39 cars per day, while another 45% process 40 or more	Varies materially by market, site maturity, and local density
Average bay time	Half require more than 15 minutes	Under 15 minutes
Oil change interval	Approximately 5,500 miles average	Typically, shorter interval
Fleet business	Approximately 2/3 of respondents have above 10% fleet revenue	Typically, lower fleet business
Marketing frequency/spend	More frequent, higher percentage of revenue	Typically, lower in percentage of revenues
Repeat customers	20% report repeat-customer rates above 75%, while 63.6% report repeat rates between 50% and 75	Typically, ~70% repeat rate
Oil premiumization	Focus on premiumization	Focus on premiumization

Independent operators appear to compete through service breadth, fleet relationships, and a more flexible customer experience. However, those advantages can come at the expense of throughput, as a meaningful portion of surveyed operators report bay times above 15 minutes.

National chains typically benefit from a more standardized, high-throughput operating model, stronger pricing power, and a narrower emphasis on fast oil-change service. This model may be increasingly advantageous as competition intensifies and customer traffic becomes more variable.

Changing Industry Concerns

Labor availability has become less prominent as an operator concern, declining from 56% of respondents in 2024 to 36% in 2025. At the same time, concerns related to EV adoption, longer service intervals, market saturation, and specialty-oil availability increased meaningfully.

Concern	2024	2025	Notes for comment
Hiring/labor	56%	36%	Indicates a comparatively healthier labor environment
EV adoption	10.3%	29.1%	Nearly tripled, underscoring renewed long-term EV concern
Extended service intervals	22.1%	34.3%	Raises concern over visit frequency
Market saturation	11.8%	33.1%	Nearly tripled; competitive pressure rising.
Specialty oil availability	5.9%	16%	More than doubled; supply-side concern. Group III Base oil supply constraint will likely be more top of mind for small/regional operators than anything else

Market saturation is particularly notable. Valvoline, Take 5, Grease Monkey, and Strickland Brothers have continued to expand unit counts, increasing competitive density in many markets and raising the bar for site selection, local marketing, service speed, and customer retention.

Summary

The quick-lube sector remains fundamentally healthy, but consumer softness appears to be pressuring car counts at major chains and may be prompting some consumers to defer maintenance or temporarily shift toward do-it-yourself oil changes.

The most consequential emerging issue is the potential availability of Group III base oil. Latest Q2 2026 earnings calls from Valvoline and Driven Brands indicate a medium-term supply shortage, which could result in allocation and product rationalization—particularly for smaller operators without the purchasing scale, supplier relationships, or network leverage of national chains.

In this environment, scale should become increasingly valuable and should benefit large operators with scale, secured supply, sustain premiumization strategies, invest in marketing and technology, and maintain high-throughput operations.