



Belts & hoses

Purchasing source

Auto parts retailer	48%
Jobber	47%
Warehouse distributor	39%
Dealership	31%
Direct from manufacturer	8%

Preferred purchasing channel

Jobber	32%
Auto parts retailer	31%
Warehouse distributor	22%
Dealership	8%

Primary reason for preferred purchasing channel

Availability	37%
Price	19%
Fast delivery	18%
Good relationship	12%

29% always take their tech's recommendation for buying a specific brand of belts & hoses

Number of belts & hoses that are returned

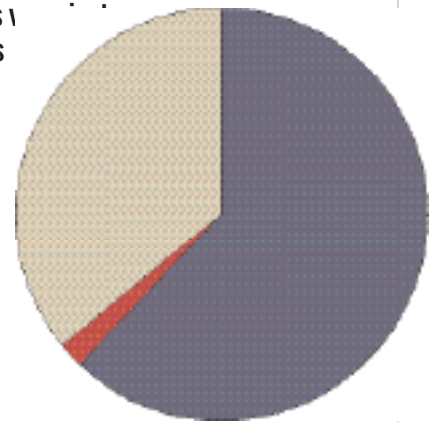
None	47%	5-9 percent	2%
1-2 percent	36%	10 percent or more	5%
3-4 percent	7%	I don't know	3%

Reasons for returns

Wrong item purchased	65%
Part is for wrong make/model/year	46%
Technician didn't need part	23%
Defective merchandise	17%
Part didn't fix the problem	4%
Product damaged in transit	2%

National brands \ label purchases

62% National
2% Private
36% Both



Reason for buying particular belts & hoses

Brand	70%
Availability	63%
Quality	61%
Reliability	46%
Warranty	37%
Price	37%

Margins

Margins: 28% of technicians know what they're paying for parts. If they didn't know, we asked what they thought they paid.

What techs know they pay | What techs think they pay

1-5%*	44%	1-5%*	22%
6-10%*	30%	6-10%*	17%
11-15%*	19%	11-15%*	31%
16-25%*	7%	16-25%*	26%
More than 25%*	0%	More than 25%*	4%

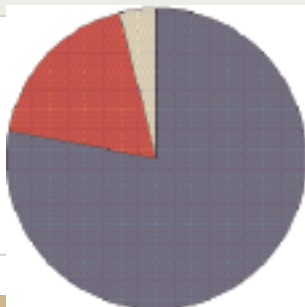
*Percent over jobber

Training availability

Mornings	9%
Afternoons	11%
Evenings	64%
Weekends	12%

Quality of belts & hoses installed

78% Premium
18% Mid-Level
4% Economy



74% purchase belts & hoses from a car dealership.

Reasons:

1. Only place it is available 60%
2. Want OEM form/fit/function 38%
3. Customer request 25%

On average, techs purchase **75%** of their belts & hoses from their primary supplier

The number of suppliers used

One	23%
Two	37%
Three	23%
Four	9%
Five or more	8%

Frequency of supplier contact

Once a week	21%	Every two weeks	10%
Once a month	13%	Every three months	2%
Every six months	3%	Yearly	6%
No contact necessary	45%		

Brand vs. supplier loyalty

If a primary supplier of belts & hoses replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	26%
Keep primary supplier and purchase new brand	59%
Keep primary supplier and purchase different brand	15%

Total of some charts exceeds 100 percent as a result of respondents providing multiple answers.