



Diagnostic tools

Purchasing source

Tool truck/dealer	76%
Direct from manufacturer	24%
Dealership	21%
Internet	19%
Jobber	16%

Preferred purchasing channel

Tool truck/dealer	65%
Direct from manufacturer	14%
Dealership	9%
Warehouse distributor	6%

Primary reason for preferred purchasing channel

Good relationship	29%
Specific brands	27%
Availability	11%
Price	9%

34% always take their tech's recommendation for buying a specific brand of diagnostic tool

Number of diagnostic tools that are returned

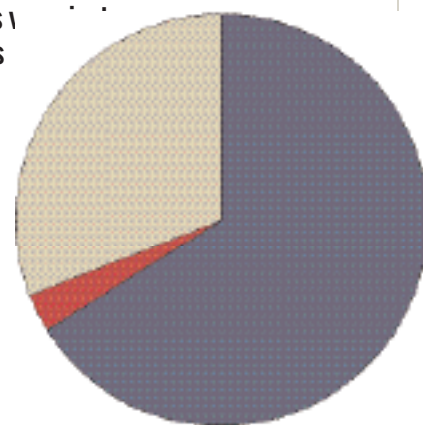
None	89%	5-9 percent	0%
1-2 percent	9%	10 percent or more	0%
3-4 percent	0%	I don't know	2%

Reasons for returns

Defective merchandise	57%
Wrong item purchased	29%
Part didn't fix the problem	29%
Product damaged in transit	14%
Technician didn't need part	0%
Part is for wrong make/model/year	0%

National brands \ label purchases

66% National
3% Private
31% Both

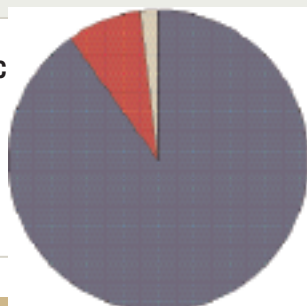


Reason for buying a particular diagnostic tool

Brand	57%
Technical assistance	49%
Quality	46%
Reliability	43%
Performance	43%
Compatibility	37%

Quality of diagnostic tools used

90% Premium
8% Mid-Level
2% Economy



35% purchase diagnostic tools from a car dealership.

Reasons:

- 1. Want OEM form/fit/function 52%
- 2. Only place it is available 48%
- 3. OEM brand name 17%

On average, techs purchase **55%** of their diagnostic tools from their primary supplier

The number of suppliers used

One	26%
Two	25%
Three	15%
Four	8%
Five or more	26%

Frequency of supplier contact

Once a week	35%	Every two weeks	6%
Once a month	4%	Every three months	5%
Every six months	9%	Yearly	9%
No contact necessary	32%		

Brand vs. supplier loyalty

If a primary supplier of diagnostic tools replaced a brand with another of like quality, a tech would:

Change suppliers to continue purchasing original brand	63%
Keep primary supplier and purchase new brand	20%
Keep primary supplier and purchase different brand	17%

Margins

Margins: 8% 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%*	60%
6-10%*	0%
11-15%*	0%
16-25%*	0%
More than 25%*	40%
1-5%*	14%
6-10%*	18%
11-15%*	14%
16-25%*	19%
More than 25%*	35%

*Percent over jobber

Training availability

Mornings	11%
Afternoons	14%
Evenings	78%
Weekends	23%

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