



Exhaust

Purchasing source

Jobber	58%
Warehouse distributor	48%
Dealership	33%
Auto parts retailer	29%
Direct from manufacturer	16%

Preferred purchasing channel

Warehouse distributor	33%
Auto parts retailer	12%
Direct from manufacturer	10%
Two-step distributor	6%

Primary reason for preferred purchasing channel

Availability	41%
Price	20%
Good relationship	17%
Fast delivery	12%

22% always take their tech's recommendation for buying a specific brand of exhaust

Number of exhausts that are returned

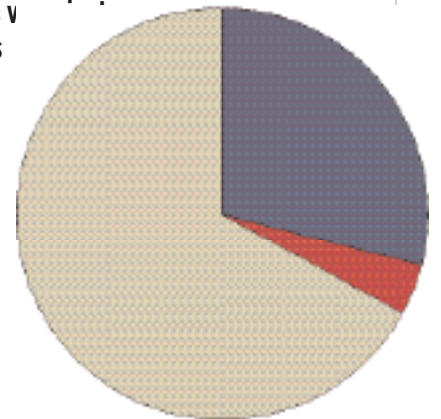
None	68%	5-9 percent	3%
1-2 percent	17%	10 percent or more	2%
3-4 percent	3%	I don't know	7%

Reasons for returns

Part is for wrong make/model/year	50%
Defective merchandise	27%
Wrong item purchased	27%
Technician didn't need part	23%
Product damaged in transit	9%
Part didn't fix the problem	0%

National brands v label purchases

29% National
4% Private
67% Both

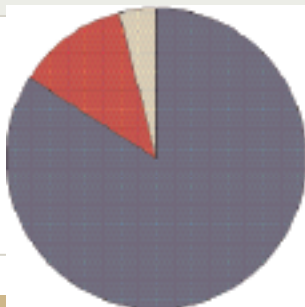


Reason for buying a particular exhaust

Availability	77%
Quality	74%
Brand	67%
Reliability	61%
Price	57%
Warranty	48%

Quality of exhaust installed

84% Premium
12% Mid-Level
4% Economy



67% purchase exhaust from a car dealership.

Reasons:

1. Only place it is available 67%
2. Want OEM form/fit/function 52%
3. Warranty/product replacement 17%

Margins

Margins: 35% 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%*	26%	1-5%*	21%
6-10%*	48%	6-10%*	32%
11-15%*	17%	11-15%*	18%
16-25%*	9%	16-25%*	27%
More than 25%*	0%	More than 25%*	2%

*Percent over jobber

Training availability

Mornings	4%
Afternoons	7%
Evenings	53%
Weekends	22%

On average, techs purchase **66%** of their exhausts from their primary supplier

The number of suppliers used

One	11%
Two	33%
Three	26%
Four	20%
Five or more	10%

Frequency of supplier contact

Once a week	22%	Every two weeks	3%
Once a month	7%	Every three months	1%
Every six months	3%	Yearly	5%
No contact necessary	59%		

Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand	22%
Keep primary supplier and purchase new brand	61%
Keep primary supplier and purchase different brand	17%

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