



Fuel pumps

Purchasing source

Dealership	55%
Warehouse distributor	44%
Jobber	40%
Auto parts retailer	32%
Direct from manufacturer	8%

Preferred purchasing channel

Warehouse distributor	34%
Jobber	20%
Dealership	18%
Auto parts retailer	15%

Primary reason for preferred purchasing channel

Availability	38%
Fast delivery	17%
Specific brands	16%
Good relationship	12%

18% always take their tech's recommendation for buying a specific brand of fuel pump

Number of fuel pumps that are returned

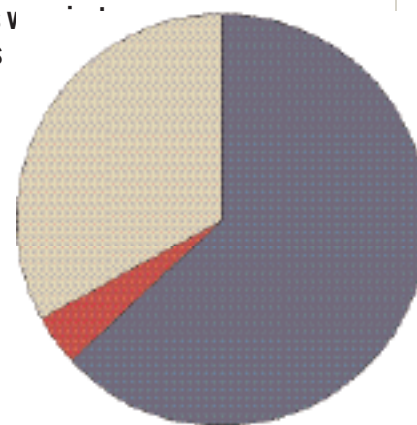
None	65%	5-9 percent	0%
1-2 percent	24%	10 percent or more	2%
3-4 percent	4%	I don't know	5%

Reasons for returns

Defective merchandise	79%
Part is for wrong make/model/year	38%
Wrong item purchased	21%
Technician didn't need part	13%
Product damaged in transit	8%
Part didn't fix the problem	0%

National brands v label purchases

63% National
4% Private
33% Both

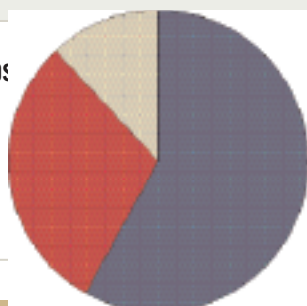


Reason for buying a particular fuel pump

Brand	59%
Quality	58%
Availability	58%
Warranty	53%
Reliability	49%
Price	36%

Quality of fuel pumps installed

58% Premium
30% Mid-Level
12% Economy



90% purchase fuel pumps from a car dealership.

Reasons:

1. Only place it is available 58%
2. Want OEM form/fit/function 50%
3. OEM brand name 19%

Margins

Margins: 21% 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%*	33%	1-5%*	12%
6-10%*	40%	6-10%*	34%
11-15%*	13%	11-15%*	20%
16-25%*	7%	16-25%*	26%
More than 25%*	7%	More than 25%*	8%

*Percent over jobber

Training availability

Mornings	3%
Afternoons	4%
Evenings	55%
Weekends	25%

On average, techs purchase **70%** of their fuel pumps from their primary supplier

The number of suppliers used

One	23%
Two	26%
Three	30%
Four	8%
Five or more	13%

Frequency of supplier contact

Once a week	8%	Every two weeks	3%
Once a month	4%	Every three months	1%
Every six months	4%	Yearly	2%
No contact necessary	78%		

Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand	34%
Keep primary supplier and purchase new brand	48%
Keep primary supplier and purchase different brand	18%

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