

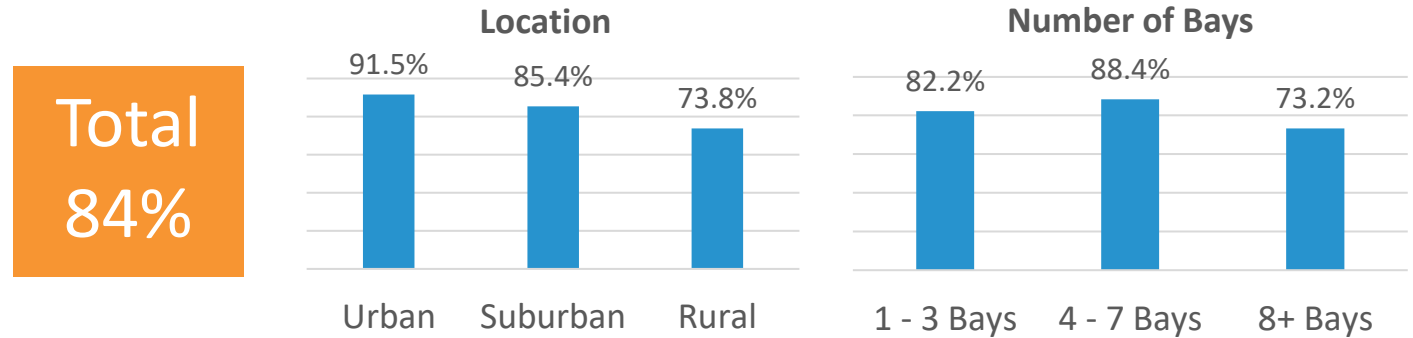


Disruption in Parts Availability Affecting Shop Purchasing Behavior

Independent repair shops have seen a large drop in business due to the COVID-19 pandemic and shelter-in-place restrictions. Some shops are faring better than others, some are more optimistic than others but there is still a lot of uncertainty amongst shops. Since the March orders to shelter-in-place and the resulting significant drop in miles driven, the industry has adapted the supply chain to adjust for the lack of demand. The following data are what the shops are experiencing.

About this research: Between May 5th and May 11th, 2020, IMR interviewed 400 independent repair shops, nationally representative by location in the U.S., to gain insight into their parts and brand purchasing experience during the pandemic/shelter-in-place orders.

Percent of Shops Experiencing a Decrease in Revenue



When Shops Expect to Return to 'Normal' Revenue Levels

	Total	Urban	Suburban	Rural
3 months or Less	11.2%	15.4%	9.9%	6.9%
4 - 6 months	10.9%	5.7%	11.7%	17.2%
7 months - 1 year	11.8%	8.1%	9.9%	19.5%
More than 1 year	2.5%	3.3%	3.6%	0.0%
Never	3.1%	1.6%	3.6%	4.6%
Don't know	60.4%	65.9%	61.3%	51.7%



How frequently have you experienced a disruption in getting parts for the vehicles you service?

Total			Urban	Suburban	Rural	1 - 3 Bays	4 - 7 Bays	8+ Bays
Very Frequently	14.8%	Very Frequently	10.6%	14.6%	19.7%	18.5%	13.6%	8.9%
Frequently	11.0%	Frequently	9.9%	12.4%	10.7%	12.3%	10.6%	8.9%
Occasionally	23.0%	Occasionally	27.0%	21.9%	19.7%	17.8%	24.2%	32.1%
Rarely	30.8%	Rarely	34.8%	31.4%	25.4%	25.3%	34.3%	32.1%
Never	20.5%	Never	17.7%	19.7%	24.6%	26.0%	17.2%	17.9%



When you had a disruption in getting the parts you needed, how frequently did you purchase parts from new or different parts suppliers (suppliers new to the shop)?

	Total	Urban	Suburban	Rural	1 - 3 Bays	4 - 7 Bays	8+ Bays
Very Frequently	1.0%	0.7%	1.5%	0.8%	2.1%	0.5%	0.0%
Frequently	7.8%	5.0%	8.8%	9.8%	10.3%	7.1%	3.6%
Occasionally	11.8%	14.2%	7.3%	13.9%	13.7%	11.6%	7.1%
Rarely	26.8%	33.3%	28.5%	17.2%	20.5%	29.8%	32.1%
Never	52.8%	46.8%	54.0%	58.2%	53.4%	51.0%	57.1%

Who did you purchase from?	Online Sources (Amazon, Ebay, etc)	WDs	Retailers	Dealership
	61.0%	31.7%	28.0%	23.2%

For what reasons did you purchase from new or different parts suppliers?

Top 5 Reason		
1	Regular Supplier Didn't have the Parts I needed	49.4%
2	Faster Delivery	27.1%
3	Regular Supplier is Closed	14.1%
4	Had Guaranteed Delivery	3.5%
5	Regular Supplier has Limited Hours	1.2%

*Only asked of shops that answered: Very Frequently, Frequently and Occasionally; Multi-Response Question

*Only asked of shops that answered: Very Frequently, Frequently and Occasionally



During this time, when purchasing parts, how frequently have you switched from your regular or preferred brands of parts to alternative brands?

	Total	Urban	Suburban	Rural	1 - 3 Bays	4 - 7 Bays	8+ Bays
Very Frequently	0.0%	0.0%	1.6%	0.7%	0.5%	0.0%	0.5%
Frequently	2.8%	0.0%	1.6%	2.7%	1.0%	0.0%	1.5%
Occasionally	15.6%	14.6%	8.2%	9.6%	15.2%	14.3%	13.0%
Rarely	36.2%	33.6%	21.3%	29.5%	30.8%	33.9%	30.8%
Never	45.4%	51.8%	67.2%	57.5%	52.5%	51.8%	54.3%

For what reasons did you switch from your regular or preferred brands to alternative brands?

Top 5 Reason		
1	Lack of Availability	73.4%
2	Couldn't Get Brand Fast Enough	10.9%
3	Better Price	9.4%
4	Regular Supplier Closed	3.1%
5	Other	3.1%

*Only asked of shops that answered: Very Frequently, Frequently and Occasionally



What measures are you taking in your shop to protect customers or employees?

	Total	Urban	Suburban	Rural	1 - 3 Bays	4 - 7 Bays	8+ Bays
Increased sanitation of the garage	82.0%	87.2%	78.1%	80.3%	73.3%	86.9%	87.5%
Disinfecting vehicle interiors	79.0%	85.8%	74.5%	76.2%	69.2%	82.8%	91.1%
Making hand sanitizer available to customers	75.8%	77.3%	77.4%	72.1%	71.2%	80.3%	71.4%
Increased sanitation of waiting area	74.3%	75.9%	77.4%	68.9%	65.1%	78.3%	83.9%
Providing face masks to employees	71.5%	80.1%	73.7%	59.0%	59.6%	78.8%	76.8%
Limiting the number of people in your waiting area	67.3%	73.8%	69.3%	57.4%	61.0%	69.7%	75.0%
Disinfecting keys	61.8%	56.7%	60.6%	68.9%	61.0%	59.6%	71.4%
Payment over the phone	58.3%	53.9%	56.2%	65.6%	55.5%	56.1%	73.2%
No-contact key drop-box	57.5%	51.1%	61.3%	60.7%	56.2%	54.0%	73.2%
Free vehicle pickup and drop-off	45.8%	46.1%	40.1%	51.6%	41.1%	41.9%	71.4%

*Multi-Response Question

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The following pages provide an overview of our research topics.



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What We Do

Full-Service Market Research for the Automotive Industry

IMR Inc. is a full-service automotive market research firm and leading provider of comprehensive insights and analysis for over 45 years.

Emerging technology, market dynamics, product reliability and shifting consumer habits and trends make obtaining the most accurate research and relevant insights more important than ever. IMR Inc. specializes in providing targeted market intelligence for the automotive OE and aftermarket segments, offering a range of strategic and tactical research solutions, expert insights and comprehensive analysis to help you understand your market, your customers and what drives their decisions.





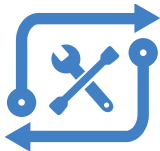
Consumer Vehicle Maintenance Insights

Understand consumer automotive maintenance habits, buying behavior and demographics through this in-depth look at category specific parts, services and chemical trends.



360° Consumer Behavior

Evaluate market segments by linking automotive maintenance behavior with other consumer behaviors (like sports interests, attitudes, media consumption, social media behavior and much more) to locate and market to them by zip code.



Replacement Rates Analysis

Optimize product planning and inventory management with Make, Model and Model Year level replacement rates by region, mapped to ACES codes.



Delayed Vehicle Maintenance Reporting

Predict future repair timing and trends by understanding what repairs consumers are putting off and why.



Repair Shop Purchase Behavior

Understand repair shop's purchasing behaviors as well as your parts brand's awareness, usage and preference within the shops.



Brand Emotion Intelligence

Increase engagement with your brand by learning the subconscious emotions driving the purchasing decisions of your target customers.



Digital Audience Targeting

Target specific parts and service customers by applying audience-based-behavior profiles to your digital advertising (DIY and DIFM).



Custom/Proprietary Research

Partner with IMR for custom-designed research solutions to meet your specific needs.

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