

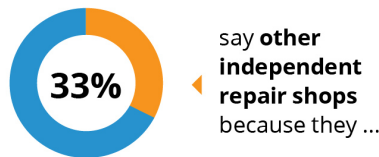
HOW AUTO REPAIR SHOPS PERCEIVE THEIR COMPETITION

IMR asked independent repair shops to explain who they considered their top competitors and why. Shops also shared what they believe their biggest competitors are doing differently that give them an edge.

Who independent repair shops say are their #1 competitors and top 3 reasons why



- 28%:** Do more advertising
- 19%:** Are more well-known
- 13%:** Have larger shops and more technical equipment



- 37%:** Are located close by
- 30%:** Share same customer base
- 11%:** Offer lower prices



- 22%:** Perform warranty work
- 22%:** Preferred by customers
- 17%:** Specialize in European cars and imports

Top 3 things independent repair shops say their competitors are doing differently to be competitive

► Specialty repair chains ...

- 39%** Offer better pricing or deals
- 29%** Do more advertising
- 20%** Can manage a higher volume of vehicles

► Other Independent repair shops ...

- 39%** Offer better pricing or deals
- 18%** Nothing/Unsure
- 13%** Have more—or more convenient—locations

► New car dealers ...

- 31%** Access to OEM parts
- 20%** Can honor warranties or better warranties
- 12%** Have better equipment or more money to invest