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HITTING the Sweet SPOT

Brightening finances has Canadian aftermarket connecting with more sales

BY JAMES E. GUYETTE
News Correspondent

PHOTO COURTESY: THINKSTOCK

Canada's aging vehicle fleet is posting positive prospects for the nation's aftermarket amid a steadily improving economic climate.

With a vehicle population of 22.2 million, more than half of the country's cars and light trucks have been on the road for at least nine years, "and that represents an aftermarket sweet spot," says Marc Brazeau, president of the Automotive Industries Association (AIA) of Canada, which recently released its eagerly awaited 2012 Outlook Study.

"The members look forward to the study," and the detailed biennial document

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Hitting the sweet spot

> More than half of the country's cars and light trucks have been on the road nine years.

"serves as a welcome planning tool," Brazeau points out.

"Though recovering from an economic slump always takes time, being aware of the factors that influence growth potential, like those outlined in this study, can help members of the aftermarket stay on the right track," he notes. "By examining the state of the industry over the last two years and making calculated projections of future growth, this report paints an accurate picture of the industry that helps members in their business planning activities."

Gearing up to enhance the current service capacity for pickups, crossovers and SUVs is being discussed around numerous company conference tables. "Next year, over 50 percent of the vehicles on the road will be light trucks," Brazeau says. "Light trucks are traditionally more expensive to maintain and repair, and that too is an opportunity for the Canadian aftermarket."

The Outlook Study reports that the industry is beginning to bounce back from the 2008 economic downturn, both in terms of customer spending and obtaining gainful employment. Overall joblessness rates have since decreased, which bodes well for the aftermarket in that vehicle ownership and usage correlate with a person's ability to find a job.

In addition, the study indicates that a surge in new-car sales prior to 2008 "will define the distribution of Canadian vehicles in the older-age segments in the coming years to the benefit of the aftermarket industry."

Canada's aftermarket is estimated to be worth \$19.4 billion. If current growth rates continue it is expected to increase by 3.5 percent annually, reaching \$22.3 billion in 2015. The aftermarket employs 420,000 people at present, accounting for half of the employment throughout the nation's collective automotive industry. (See related article on page 5.)

Over the past decade, average miles driven per year has risen 1 percent annually, netting a 2012 odometer tick of 13,000 miles for each

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Hitting the sweet spot

vehicle. The U.S. annual average-per-driver mileage stands at 13,476 miles, according to the Federal Highway Administration.

But those Canadian miles tend to be a rougher ride.

Faster fleet turnover

As the world's second-largest nation in area after Russia, Canada has the lowest population density on Earth. And although much of the populace is clustered within 100 miles of the U.S. border, long trips on rugged rural roadways are commonplace.

If your locality has ever experienced the encroachment of an Alberta Clipper weather system, such onslaughts illustrate what can happen under these types of brutal climate conditions. The fallout from Canada's legendary big winter snowfalls and bitter cold temperatures delivers substantial vehicle abuse, including the punishment dished out by component-corroding road salt, rust and suspension-busting potholes.

"Vehicles are retired at a faster rate in Canada; the fleet turns over quicker," Brazeau tells *Aftermarket Business World*. Motorists still being buffeted by diminished personal finances, however, remain reluctant to visit showroom floors for a replacement.

"There are a number of vehicles that have reached the prime aftermarket age, which brings opportunities for the aftermarket," says Brazeau. "Ten years ago a vehicle was retired from usage when it reached 143,000 miles. Today it is 198,000 miles."

The average amount spent on maintaining and repairing a vehicle in Canada in 2011 was $874, with British Columbia ($993) and Alberta ($971) netting the highest per-vehicle sales tickets.

"The U.S. is living through some of the same challenges and opportunities," Brazeau says, noting that American-based vendors venturing north of the border are in position to glean additional revenues.

Addressing imports

"Improved vehicle reliability, the ratio of do-it-yourself versus do-it-for-me repairs, and the growing number of imported vehicles in the Canadian market will have profound impacts on the industry moving forward," according to Brazeau.

As in the U.S., Canada considers Ford, General Motors and Chrysler to be domestic nameplates. Overseas OEMs such as Toyota and Nissan are steadily increasing their market penetration.

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Canada's regulators aim to hum in harmony with U.S. auto standards

BY JAMES E. GUYETTE
News Correspondent

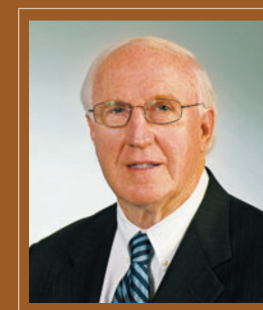
Two nations living – and driving – in harmony: With Americans and Canadians having long maintained the world's lengthiest unfortified border, Canada is now actively "harmonizing" its automotive regulations with those of the U.S.

The auto industry accounts for more than $100 billion in business between Canada and the U.S., representing about 20 percent of the total trade being conducted between the two nations.

TRENDS & MARKET Analysis

"Better-aligned product regulations make good business and public policy sense, which has led to a high level of cooperation between Canadian and U.S. regulators on the implementation of some of the most advanced stringent vehicle safety and environmental regulations in the world," said Mark Nantais, president of the Canadian Vehicle Manufacturers Association (CVMA).

Vendor Newsmaker
Q&A



GARY NASH
President of Yokohama Tire Mexico

Q Why did the Yokohama Tire Corp. establish a subsidiary in Mexico and what is the strategic plan going forward?

A What did Nash say? Continue reading online.

Read full interview

Seeking to "avoid the creation of new regulatory misalignments," Nantais says "greater harmonization of product standards will reduce costs and make more advanced vehicle technologies more affordable for consumers."

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> The auto industry accounts for 20 percent of trade between the U.S. and Canada.

The Canadian government is intent on adopting Tier 3 pollution regulations harmonized with those developed by the U.S. Environmental Protection Agency (EPA). "These new emissions standards, when combined with Tier 3 ultra-low sulfur gasoline, will build on the significant reductions achieved to date by the automotive industry, most recently through Tier 2 standards harmonized across North America," says Nantais.

"Since smog-related emissions are not constrained by international borders, harmonized Tier 3 emission regulations are an important first step, as Tier 3 ultra-low sulfur gasoline requirements will be needed to ensure these advanced emission control technologies will provide Canadians, like their U.S. counterparts, the same air quality improvements," he points out.

Harmonized standards with the EPA, says Nantais, is an approach which will ensure that new, more advanced technologies come to market more quickly with greater choice of products at more affordable prices for consumers by taking advantage of the economies of scale derived from the larger integrated market inherent in the North American automobile industry. And that ensures greater environmental benefits sooner.

CVMA members include Chrysler Canada, Ford of Canada and General Motors of Canada. The membership collectively sells 48 percent of all Canadian vehicles and accounts for 65 percent of the total vehicle production. They operate five assembly plants along with engine and parts production facilities tied to more than 1,300 auto dealerships; 125,000 jobs are directly tied to vehicle production in Canada, according to Nantais. More than 500,000 jobs are directly or indirectly associated with vehicle manufacturing across the nation.

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RV sales on the move; set pace for aftermarket service business

BY JAMES E. GUYETTE
News Correspondent

Basking in the trend of vacationers bringing along their own lodging accommodations, the motorized camping industry – including its maintenance and repair providers – is enjoying a steady increase in recreational vehicle traffic.

"More than 9 million Americans own RVs because of the unmatched freedom and flexibility they provide when traveling," says Richard Coon, president of the Recreation Vehicle Industry Association (RVIA).

TRENDS & MARKET Analysis

"RV ownership continues to rise in large part because of the versatility and affordability of today's RVs," he explains. "While the recession created new economic realities for most Americans, RV manufacturers responded by designing products with the right mix of space, amenities and price points, further positioning RVs as the ideal way for families to share outdoor experiences together."

New RV shipments are expected to reach 309,800 units this year, which is 8.4 percent above the 2012 total of 285,749.

Vendor Newsmaker Q&A

MATT CURRY
CEO and president of Curry's Auto Service

Q What are the basics of your Hybrid Shop battery repair program and how did you decide to offer it?

A What did Curry say? Continue reading online.

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> "There are potential aftermarket opportunities for maintaining RVs that are already on the road."

According to a forecast by industry analyst Dr. Richard Curtin, director of consumer surveys at the University of Michigan, sales are likely to rise for a fifth straight year in 2014 as wholesale production is projected to reach 321,800 units, a gain of 3.9 percent over 2013's anticipated figures.

The estimated amounts for 2013 would be an 87 percent increase from the industry's recessionary low in 2009. Fueled by strong response to the "versatility, affordability and innovative designs of new models," RV shipments through the first four months of 2013 shot up 13.3 percent compared to the same period in 2012. The industry has seen double-digit gains in conventional travel trailers, Type A motorhomes and Type C motorhomes.

"The favorable RV outlook is based on modest gains in jobs, incomes and household wealth," says Curtin, who works closely with the RVIA. "Consumer budgets have changed, but they still hold steadfast preferences for the RV lifestyle."

With people adopting a more realistic economic outlook, Curtin reports that the segment's OEMs have responded by introducing an array of vehicles that provide "the same cherished RV experiences" while respecting family budget limitations.

"The RV industry will approach its next peak as the market demand for RVs continues to improve, particularly among baby boomers and younger buyers due to the ongoing efforts of the 'Go RVing' campaign and the new product offerings from manufacturers," says Curtin, adding that "given the modest gains expected in the financial situation of likely RV buyers, this next market peak is likely to be approached gradually."

The RV marketplace anticipates being bolstered over the next two years by rising ...CONTINUE READING

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New exhibitor records set for International EXHIBITORS and KEY BRANDS HALLS

The upcoming 2013 Automechanika Shanghai, which takes place Dec. 10-13 at the Shanghai New International Expo Centre, Shanghai, China is setting new exhibitor records for the International and Key Brands halls.

Organized by Messe Frankfurt (Shanghai) Co. Ltd. and the China National Automotive Industry International Corporation (CNAICO), the show is now the world's second largest Automechanika for automotive parts, accessories, equipment and services, with the largest one being held in Frankfurt, Germany.

Currently 80 percent of Automechanika Shanghai's exhibition space has been sold and more key domestic and international brands than ever before are wanting to showcase their latest products and technologies in the Parts & Components, Repair & Maintenance, Accessories & Tuning, New Energy and Remanufacturing sectors.

Automechanika Shanghai continues to strengthen its international position by gaining support from leading industry brands and organizations. This year, the International Exhibitors and Key Brands halls are doubling in size to two halls (W1 and W2) to meet demands. Exhibitors representing these halls include Affinia, BorgWarner, Bosch, Dayco, Delphi, Federal Mogul, Fras-le S.A, Gates Unitta, Henkel, Hennessy, Mahle, NTN-SNR, Osram, Petro-Canada, Philips, Remsa, Schaeffler, SKF, Valeo, Walker Products, Winhere and ZF.

This year, the show will have a new pavilion from Australia, bringing the total number of pavilions to 14. The returning overseas and regional pavilions include France, Germany, India, Italy, Japan, Korea, Malaysia, Singapore, Spain, Taiwan, Thailand, the UK and the USA.

Mr. Stuart Charity, Executive Director for the Australian Automotive Aftermarket Association (AAAA) spoke positively about his organization's cooperation with Automechanika Shanghai. "We are delighted to have a strategic partnership with the world's leading automotive trade fair brand," he said. "It presents our members with significant opportunities to more readily access expanding international markets such as China. We have led exhibitor and buyer delegations to a range of Automechanika fairs around the world for over 20 years and we are confident that this year's first-ever Australian pavilion at Automechanika Shanghai will be welcomed by AAAA members."

He added: "The Australian aftermarket sector exports about AUD 800 million worth of products a year. Closer collaboration with Automechanika will increase international marketing opportunities and lower costs for innovative Australian aftermarket businesses. It will help more AAAA members open the door to growth through exports."

A new Commercial Vehicle Parts Zone will be located in Hall E7 in response to the fast growing commercial vehicle market which will see an estimated 35 million commercial vehicles or more in China by 2015. This zone will be supported by the Truck Competence program, which covers the entire value chain in the truck sector from truck parts and accessories, via workshop equipment to body repair and car care.

Commenting on the program, Mr. Jason Cao, Senior General Manager for Messe Frankfurt (HK) Ltd explained: "Automechanika launched this new initiative last year at its trade fairs globally, providing added value to both exhibitors and visitors. The concept was used for the first time at the Shanghai show last December where it was a success, with 10 percent of all exhibitors having Truck Competence within their portfolios."

Mr. Cao continued: "This program continues to attract quality supporters such as China Commercial Vehicle Parts Market Federation (CCVP). We believe that the further enhanced program at this year's show and its various activities, which will include visitor delegations invitations, business matchmaking, industry updates and networking opportunities, will benefit exhibitors and help them to better understand the commercial vehicle industry related products and issues more efficiently."

To introduce Chinese exhibitors to the Truck Competence concept and the latest developments in China's commercial vehicle market, the organizers of Automechanika Shanghai together with CCVP organized a seminar in June. More than 30 main industry representatives including ASIMCO, F-Diesel and Jingang took part in the seminar and shared their valuable opinions on how to make better use of the show as a platform for enhancing business opportunities.

Mr. Yan Li Xing, Administrative Vice Chairman for CCVP agreed that gathering the leading commercial vehicle parts brands in one hall made good sense. "This new zone complements the well established zones for international key brands, as well as country and regional pavilions," he said. "It aims to help buyers with one-stop purchasing for high quality Chinese commercial vehicle products."

Automechanika Shanghai is one of 13 Automechanika fairs held in Africa, Asia, Europe and Central and South America. For further information about the fair, please visit www.automechanika-shanghai.com.

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Connected car challenge

Aftermarket develops multiple strategies in battle for access to vehicle, consumer data

BY BRIAN ALBRIGHT
Contributor

As the number of automotive telematics users rises, the aftermarket continues to struggle with exactly how to address what could be a significant threat to the industry's ability to maintain its competitive advantage in the post-warranty period.

TRENDS & MARKET Analysis

At the recent Aftermarket eForum in Chicago earlier this year, telematics dominated most of the program. The discussions were not just about the nuts and bolts of connecting vehicles to repairers; there are plenty of solutions on the market now that do just that. The larger issue is, how can the aftermarket effectively compete with OEM telematics solutions that will come as standard equipment in more and more vehicles moving forward, and will increasingly cement relationships between vehicle owners and dealership service departments?

Technology Newsmaker Q&A

CHARLIE COVERT
Vice President of Customer Solutions at UPS

Q What technology developments do you think are having the biggest affect on supply chain management?

A What did Covert say? Continue reading online.

Read full interview

According to ABI Research, the number of telematics users is expected to increase from 72 million to more than 300 million by 2018. "This is isn't about what is happening today," says Scott Luckett, CIO of the Automotive

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> The aftermarket should focus on empowering customers to take ownership of the vehicle data.

Aftermarket Industry Association. "It's about what our industry looks like 15 or 20 years from now if we do nothing. We have to be in that conversation."

Fred Blumer, founder of Hughes Telematics and current CEO of Vehcon, further outlined the threat that OEM telematics poses to the aftermarket. "Consumers want to be connected everywhere," Blumer says. "The OEMs want a lifetime connected with those customers. When all of these cars are connected, you're not invited to the party."

"The connected car is going to happen with or without Delphi, and with our without you," adds Chris Slesak, director of telematics at Delphi Automotive.

According to Blumer, a number of indicators bode well for the aftermarket, provided that the industry can rise to the challenge. First, most consumers don't continue to utilize OEM telematics beyond the trial or warranty period. Second, there is an opportunity to partner with insurance companies that are increasingly turning to aftermarket telematics solutions to drive their own usage-based insurance programs. "This will potentially cover millions of the vehicles in the future, and insurance companies are willing to have this conversation with the aftermarket," Blumer says.

Blumer also discussed the potential of partnering with fleet telematics companies, as well as the technology that Vehcon is touting, which utilizes smart phones to provide vehicle connectivity. Sub-prime auto lending companies also are using tracking devices on vehicles, and that hardware stays in place even after the monitoring period has expired. "Those drivers still need brake jobs and oil changes," Blumer says.

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GM rolls out new parts initiative

Asking dealers to boost inventories of certain parts, order direct from factory

BY BRIAN ALBRIGHT
Contributor

General Motors has launched a new parts initiative that will increase inventories of select parts at dealer service departments, and will incentivize parts managers to purchase more parts directly from GM, rather than using sourcing from other dealers and wholesale distributors.

TRENDS & MARKET Analysis

The voluntary program, which went into effect April 1, provides bonus incentives to parts departments that increase their purchases of the targeted parts, and increase the use of GM and AC Delco parts during repairs. The OEM hopes to increase same-day repairs through its Service Lane Parts (SLP) system, which will require dealers to boost inventories of a subset of parts that have been flagged as those most commonly needed for those repairs. GM has revamped its warehouses to make sure the parts can get to the dealerships faster, and will cover the cost for overnight delivery for orders that can't be filled the same day.

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Dealer Newsmaker Q&A

CHRISTOPHER STOMMEL
Vice President,
Foresight Research

Q How important are service and parts when it comes to selecting a dealership and the buying decision?

A What did Stommel say? Continue reading online.

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Big data vs. BIG CONTENT

> Most aftermarket companies suffer from the opposite of big data – a data deficiency.

Techies seem to have no end to the jargon and idiom they throw at the rest of us. So much so that I am beginning to think there is a secret society that meets periodically to coin words and phrases designed to mystify and confuse the rest of us.

The new one that is creeping into the aftermarket is "big data." Big data was coined to describe a collection of data so large and complex that it is difficult to process it using available database management tools. I'm a bit mystified as to why we are seeing this term used in the aftermarket. I have yet to see any aftermarket company with anything approaching "big data." On the contrary, the majority of aftermarket companies suffer from the opposite of big data – a data deficiency.

Consider some of our data-related behavior. We made the conscious decision as an industry to stop collecting and reporting POS data on hard parts. Many if not most aftermarket companies have their PIES fields populated with only a limited range of mostly "transactional" data. Channel partners' data warehouses are undersubscribed and even more under utilized. And most websites (trade & consumer) lack the product images and information to help a buyer make a smart purchasing decision.

For these reasons, I suggest that use of the term big data in the aftermarket is premature. Before we start talking about big data, we need to do a better job with what little data we have now.

What do I mean? We need to concentrate on our "content." As an industry, we need to put an all out push on gathering not just the transactional data to serve our "backroom" technology (EDI, catalog, weights and measures) but the sort of replete content that engages our customers and enables them to learn more about our products and what makes them unique.

What is content? Content is contextualized data. Data only becomes content when it is enriched by the context of other data that accompanies it. For example, the number 12 is relatively meaningless by itself, but when it is accompanied by other data, like 12/25/2013, its meaning becomes clear.

Content is the essence of web-based marketing. It is the stuff that will power the use of tablets, smart phones, web searches and social media. It is to digital marketing what the "bold image and snappy headline" was to advertising of the last generation. And unlike creative, content cannot be manufactured out of thin air. There must be a rigorous methodology and process to collect, catalog and manage it.

In the aftermarket, content refers to data that is contextually relevant to our customers (service centers or DIYers). We also have to include data that is relevant to our customers' customers (car owners).

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BOB MOORE
President, Bob Moore & Partners

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Hot global MARKETS

> The ratio of cars per inhabitants will continue to rise in the BRIC countries.

As reported in last's month's column, international buyers are sourcing aftermarket products from North American suppliers for higher product quality. This trend was reported during the "How's Global Business" roundtable discussion by the Board of Governors of the Overseas Automotive Council (OAC) of the Automotive Aftermarket Suppliers Association (AASA).

News items from around the world indicate the new "global hot spots" for motor vehicle products. Consider these recent items:

- India: This growing marketplace for motor vehicles is attracting OEMs from around the world. Most recently, Renault SA and Nissan Motor Co. announced plans to manufacture engines in India for a new range of small cars, a first for the allied companies. Ford Motor Co. has introduced its EcoSport compact SUV in India, an effort to tap into the country's hot SUV market.
- United Arab Emirates: Recent reports in the "Arabian Gazette" put the UAE's automotive industry as the fifth-largest in the world by automobile production and the sixth-largest by export volume.
- BRIC: In a recent interview, Renault CEO Carlos Ghosn said the global auto market will go "from record to record" on demand in emerging markets. In particular, he pointed out Brazil, Russia, India and China, known as BRIC. The economic slowdowns in these economies are only temporary, and the ratio of cars per inhabitants will continue to rise.
- China: In June, the China Association of Automobile Manufacturers reported sales of cars, minivans and SUVs rose 9 percent to 1.4 million units. May's increase compares to year-over-year gains of 13 percent in both March and April.

So, how can U.S. auto parts manufacturers and global buyers in the world's hottest auto parts markets connect?

One great resource is the Overseas Automotive Council (OAC) of the Automotive Aftermarket Suppliers Association (AASA), which has helped North American suppliers build global relationships since 1923. OAC supports AASA's efforts as event co-owner in promoting the Automotive Aftermarket Products Expo (AAPEX), slated for Tuesday, Nov. 5, through Thursday, Nov. 7, in Las Vegas. AAPEX is the connection to global aftermarket industry leaders, and both AASA and OAC provide services, private meeting spaces and amenities to members at their respective Member Centers during AAPEX.

The annual OAC Global Reception on the evening of AAPEX's opening day has a well-deserved reputation as the global networking event during AAPEX. Attendees rely on this event to meet new customers and to enhance their relationships with existing customers and guests.

For the 2013 event on Nov. 5, OAC has "busted out of the ballroom" venue and is taking

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DAN PIKE
Vice President, Membership and Member Services, AASA

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NHTSA considers digital **PUSH**

> The idea is to provide safety features in vehicles that prevent crashes.

The National Highway Traffic Safety Administration (NHTSA) will be making a decision this year about whether to initiate a rulemaking requiring some degree of digital connectivity in new cars.

Any action will be based on the lessons the department learned in its Connected Vehicle Safety Pilot Model Deployment in Ann Arbor, Mich. The pilot model has been going on for a few years. The idea is to provide next-generation safety features that carry vehicles out of the "protecting drivers from a crash" era that opened with NHTSA's creation in 1970 to a new era where crashes are prevented.

In May, David Strickland, the NHTSA Administrator, told the Senate Commerce, Science and Transportation Committee that any NHTSA requirements that new cars come with advanced technology such as lane departure warnings would not bring immediate benefits to drivers. "It will take some time for the vehicle fleet to turn over," he said. In an effort to bring the benefits of vehicle-to-vehicle (V2V) safety systems more quickly to drivers his agency might mandate the use of what he referred to as "aftermarket beacons."

He didn't actually use the word "mandate." Rather, he said, "The other part we are looking at is the provision of aftermarket beacons so the people can actually put their beacons in their cars and get benefits immediately." Strickland did not specify the kinds of beacons he was referring to. But a NHTSA spokesman, when asked for details, forwarded a NHTSA brochure that talks about "'simple' communications beacons that are brought into the vehicle. All systems and devices emit a basic safety message 10 times per second that forms the data stream that other in-vehicle devices use to determine when a potential traffic hazard exists."

It is not clear how NHTSA could influence aftermarket requirements, or whether it has the authority to do so. But beacons and other aftermarket technology are being tested in Ann Arbor.

"Attractive aftermarket devices, developed with the active support of the automotive manufacturers, are needed to expand access to safety and mobility benefits and increase the density of deployment of the platform," said Peter Sweatman, director, University of Michigan Transportation Research Institute (UMTRI). "These devices will need to have the active support of automakers. Further field testing of aftermarket devices will also be needed."

The Ann Arbor program just received a $14.9-million contract from NHTSA for a 30-month program that will establish a real world, multimodal test site in Ann Arbor for enabling wireless communications among vehicles and roadside equipment for use in generating data to enable safety applications. Passenger cars, commercial trucks, and transit buses will be included that are equipped with a mix of integrated, retrofit, and aftermarket V2V and vehicle-to-infrastructure (V2I)-based safety systems, a technology that could prevent thousands of crashes.

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STEPHEN BARLAS
Washington Correspondent

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A divine COMEDY

"I received a phone call informing me that my parts store and warehouse was on fire."

Also known as the epic poem of Dante Alighieri, "Dante's Inferno," describes an "Inferno" or hell, as an elaborately structured realm of the underworld. Hardly humorous, but the "comedy" refers to the vernacular of the day being used as prose, instead of a scholarly vocabulary as was accustomed for literary works of genius. It was a great success as far as literary works go, albeit a dark representation of hell and it's inhabitants. Bodiless souls, or "shades" that seem to be trapped between life and death described in a language that normal people use.

It sparked a renaissance of literature. Much the same as Mark Twain did in the late 1800's, as he was revered for using the vernacular language, but in such eloquent fashion, the comedic effect was transcendent for all classes and races of people. The use of vernacular allows the author to delve into tragic issues like racism, war, discrimination, hate or politics because the story and conclusions are really the way we think and speak, resulting in a very poignant understanding of horrible things. Often times, the truth is always there, just under the skin and vernacular or "telling it like it is" brings it out in full view, whether glorious or horrible.

The title of this article could have been, "A Comedy of Errors," or "So Stupid It Can Only Be The Truth." Since my mother has assured me that our recent loss must be "part of God's plan," stealing the title from Dante seemed appropriate, due to this soothing explanation my reverent mom often provides in regards to all-things tragically out of my control.

In my life, comedy and tragedy are kinsmen, and the pairing of the two, although "divinely" improbable, sure makes things interesting. What follows is my recent and ongoing journey through hell and the "shades" or entities you will encounter while digging yourself out of disaster. I warn you what follows is far from poetry.

My personal hell began around 11 p.m. June 6, 2013. I received a phone call informing me that my parts store and warehouse was on fire.

Nothing prepares you for the shock-and-awe regarding this type of phone conversation. I'm not even sure what my response was, but I'm certain it was thick with lots of the aforementioned local or common dialect associated with such an unwelcome message. My mental ability and stability skyrocketed and plummeted simultaneously reducing me to a barefoot madman driving towards our business fashionably much the same as an accomplished rally car driver closes in on the finish at the summit of a track in the Swiss Alps. Sure enough, on my arrival, my showroom and warehouse were ablaze.

Three fire engines were flooding the entire structure with water while firemen were breaking the glass of every window. There were enough flashing lights to obscure a Fourth of July fireworks display. Police officers, paramedics in ambulances, news crews, reporters,

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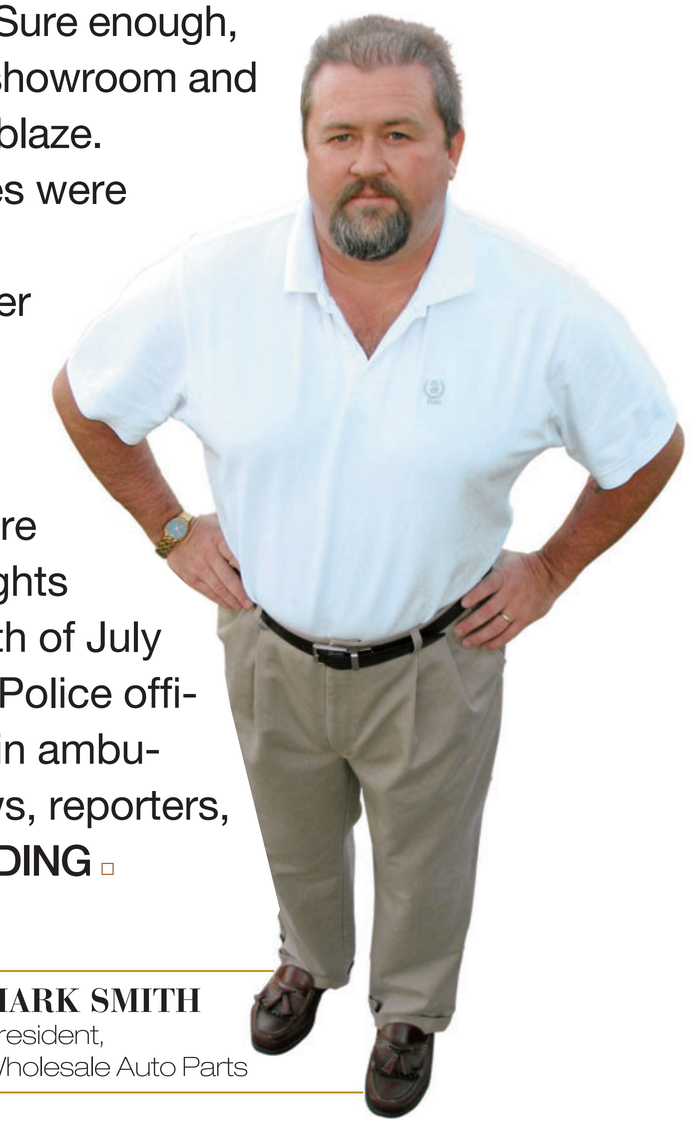

MARK SMITH
President,
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Providing a woman's **TOUCH**

> "My advice is please don't treat women like men."

I had the opportunity to spend a weekend in May with one of my good customers, Richard, and his wife, Kathy, at the Mecum Auction in Indianapolis. The reason we were there was to sell five of his cars from his collection.

This was a very stressful weekend for him and my first opportunity to spend time with Kathy. They are an older couple and have very traditional roles. In other words, he gets the cars fixed so I only see her for a minute each time.

As the auction went on and the standard car guy dance of detailing the cars every five minutes and stressing about what the cars would go for unfolded, I got to thinking about how women interface with our industry. Before anybody gets excited and starts writing hate mail, roll with me.

Let's start with Kathy, who gracefully cycled between quietly making fun of the constant dusting to assisting with the sometimes sweaty work of wiping down cars. During the auction she provided support despite her own stress as the numbers started flying. Keep in mind Kathy is not technical and not really that into older cars. She likes the way they look but their lack of comfort amenities is not really her thing.

I told her I was going to write this column based upon my observations and she laughed and told me to let her know if I needed any further insight. It turns out that I need only look around my facility for other examples of women working in our industry.

My service manager is a woman named Caryl who is very comfortable around men but would never be mistaken for one of the guys. She performs standard service advisor responsibilities in addition to her intangible talents that you can't put on a resume.

I have a technician going through a rough divorce. He is not the most forthcoming fellow about what is going on with him until he chats with Caryl. She acts as a listener and shares with my dad and I that this tech is having a rough time. Along the way no confidences are broken but a better environment is created.

A few months ago my sister-in-law Tina Marie, we call her TM, was laid off from her high-powered, six figure position at an aerospace company. For many people this would have been devastating. While I am certain that she loved her job and would have preferred not to leave it, she has reinvented herself and is going to be working with us.

TM and I are both project managers with decidedly different roads that brought us to these skill sets. We are opening an additional building next to our existing shop to offload some of the hot rod projects. TM and I are working out the details of how that will work and what responsibilities each of us will take.

I observe her "handling" me, but she does it so well and without injuring my tender male ego that...

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MAINTAINING CUSTOMERS

COLLISION REPAIRERS VALUE RELATIONSHIPS, PARTS INVENTORY AND FAST DELIVERY FROM SUPPLIERS

BY BRUCE ADAMS | Managing Editor

If you want to continue supplying collision repair shops, maintain a good relationship with them, offer a wide array of quality parts and provide fast delivery. Those are the three primary reasons why collision repair shops use a particular supplier, according to the *Aftermarket Business World* Collision Shop Study.

Some 27 percent said they value the relationship the most, 23 percent cited parts availability as the primary reason, and fast delivery is most important to 16 percent of respondents. Only 14 percent said price was the most important factor and another 14 percent said specific product brands drew them to their supplier.

When asked about their preferred supplier, 36 percent of respondents said it was a dealership, 25 percent said an auto parts retailer, 18 percent said a jobber and 11 percent said a warehouse distributor.

When it comes to pricing, 76 percent of respondents said they did not know how much over the jobber they are paying for parts. Of the 24 percent who said they knew, 55 percent of that group said they were paying from 1 percent to 10 percent more than the jobber.

Some 78 percent of collision repairers say that their supplier does not need to contact them on a regular basis. Despite that, 71 percent said they would change brands rather than suppliers if their primary supplier replaced a brand with another brand of like quality.

Nearly 90 percent of respondents said they don't plan to expand their offerings in the next 12 months. Nearly two-thirds (63 percent) said insurance companies have no influence on the service they can perform. Some 25 percent said insurers have some or moderate influence on their work, while 12 percent said they have major influence or complete control.

Methodology: The Collision Shop Study was fielded via email to readers of *ABRN*, a sister publication of *Aftermarket Business World*. The findings are intended to show general trends, not statistical certainties.

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Auxiliary Lighting

82% have no plans to expand their auxiliary lighting offerings in the next 12 months.

Purchasing source

Auto parts retailer	44%
Dealership	38%
Jobber	33%
Discount store	16%
Warehouse distributor	39%

Preferred purchasing channel

Auto parts retailer	27%
Jobber	17%
Dealership	22%
Warehouse distributor	20%

Main reason for using preferred supplier

Fast delivery	22%
Good relationship	38%
Price	12%
Parts availability	20%

Margins

35% of respondents say they know how much over the jobber they pay for this.

What techs know they pay		What techs think they pay	
1-5%*	20%	1-5%*	20%
6-10%*	30%	6-10%*	31%
11-15%*	20%	11-15%*	26%
16-25%*	10%	16-25%*	18%
More than 25%	20%	More than 25%	5%

*Percent over jobber

Amount of this product that is returned

None	46%	5-9%	12%
1-2%	12%	10% +	14%
3-4%	9%	I don't know	7%

Frequency of supplier contact

Once a week	14%
Every two weeks	2%
Once a month	11%
Every three months	6%
Every six months	5%
Yearly	1%
No contact necessary	61%

Brand vs. supplier loyalty

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

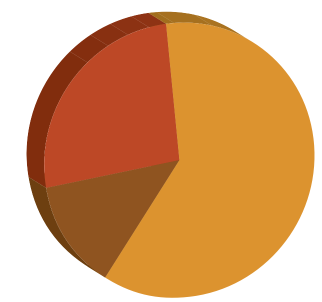
Change suppliers to continue purchasing original brand	25%
Keep primary supplier and purchase new brand	75%

National brands vs. private label purchases

61% National

13% Private

26% Both



Reasons for buying specific auxiliary lighting

I don't buy it	73%
Quality	13%
Price	12%

Insurance company influence on auxiliary lighting service replacement work

None	43%
Some	18%
Moderate	17%
Major	15%
Complete control	7%

Internet ordering frequency

0-10% of the time	76%
11-25% of the time	6%
26-40% of the time	6%
41-60% of the time	8%

Battery Chargers

MAINTAINING CUSTOMERS

95% have no plans to expand their battery charger offerings in the next 12 months.

Purchasing source

Auto parts retailer	45%
Direct from manufacturer	11%
Jobber	45%
Discount store	18%
Warehouse distributor	7%

Preferred purchasing channel

Auto parts retailer	35%
Direct from manufacturer	7%
Jobber	37%
Discount store	12%

Main reason for using preferred supplier

Fast delivery	13%
Good relationship	37%
Price	24%
Parts availability	11%

Margins

14% of respondents say they know how much over the jobber they pay for this.

What techs know they pay		What techs think they pay	
1-5%*	33%	1-5%*	16%
6-10%*	33%	6-10%*	26%
11-15%*	25%	11-15%*	25%
16-25%*	9%	16-25%*	25%
More than 25%	0%	More than 25%	8%

*Percent over jobber

Amount of this product that is returned

None	90%	5-9%	1%
1-2%	5%	10% +	1%
3-4%	0%	I don't know	3%

Frequency of supplier contact

Once a week 4%

Every two weeks 2%

Once a month 3%

Every three months 1%

Every six months 1%

Yearly 13%

No contact necessary 76%

Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand 24%

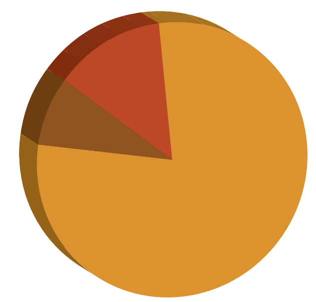
Keep primary supplier and purchase new brand 76%

National brands vs. private label purchases

79% National

8% Private

13% Both



Reason for buying a battery charger.

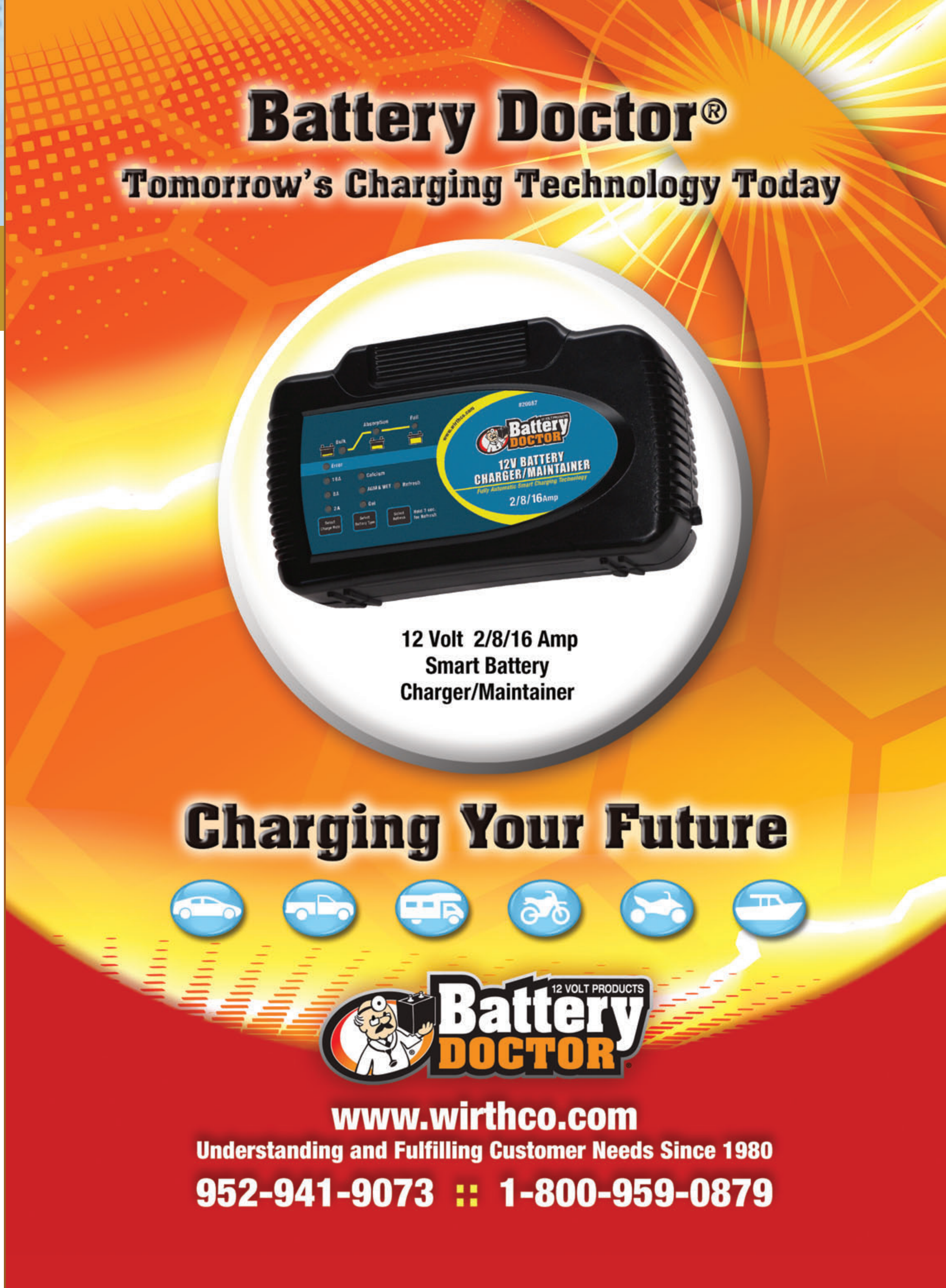
Quality	25%
Availability	28%
Price	24%

Insurance company influence on batter charger service replacement work

None	96%
Some	1%
Moderate	1%
Major	1%
Complete control	1%

Internet ordering frequency

0-10% of the time	94%
11-25% of the time	2%
26-40% of the time	1%
41-60% of the time	1%



Brakes

85% have no plans to expand their brake offerings in the next 12 months.

Purchasing source

Auto parts retailer	66%
Dealership	42%
Jobber	31%
Direct from manufacturer	5%
Warehouse distributor	15%

Preferred purchasing channel

Auto parts retailer	41%
Jobber	30%
Dealership	17%
Warehouse distributor	5%

Main reason for using preferred supplier

Fast delivery	15%
Good relationship	38%
Price	12%
Parts availability	18%

Margins

24% of respondents report they know how much over the jobber they pay for brakes.

What techs know they pay		What techs think they pay	
1-5%*	25%	1-5%*	21%
6-10%*	25%	6-10%*	28%
11-15%*	33%	11-15%*	21%
16-25%*	17%	16-25%*	23%
More than 25%	0%	More than 25%	7%

*Percent over jobber

Amount of this product that is returned

None	74%	5-9%	0%
1-2%	21%	10% +	0%
3-4%	0%	I don't know	5%

Frequency of supplier contact

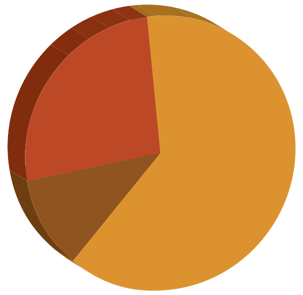
Once a week	15%
Every two weeks	0%
Once a month	5%
Every three months	0%
Every six months	3%
Yearly	5%
No contact necessary	72%

Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand	27%
Keep primary supplier and purchase new brand	73%

National brands vs. private label purchases



Reason for buying a particular brake

Quality	28%
Availability	25%
Price	21%

Insurance company influence on brake service replacement work

None	93%
Some	3%
Moderate	2%
Major	0%
Complete control	2%

Internet ordering frequency

0-10% of the time	100%
11-25% of the time	0%
26-40% of the time	0%
41-60% of the time	0%

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Fuel Pumps

88% have no plans to expand their fuel pump offerings in the next 12 months.

Purchasing source

Auto parts retailer	56%
Dealership	69%
Jobber	20%
Discount store	11%
Warehouse distributor	22%

Preferred purchasing channel

Auto parts retailer	31%
Jobber	10%
Dealership	37%
Warehouse distributor	18%

Main reason for using preferred supplier

Fast delivery	19%
Good relationship	19%
Price	12%
Parts availability	25%

Margins

35% of respondents say they know how much over the jobber they pay for this.

What techs know they pay		What techs think they pay	
1-5%*	18%	1-5%*	11%
6-10%*	29%	6-10%*	17%
11-15%*	12%	11-15%*	26%
16-25%*	12%	16-25%*	26%
More than 25%	29%	More than 25%	20%

*Percent over jobber

Amount of this product that is returned

None	70%	5-9%	4%
1-2%	20%	10% +	2%
3-4%	0%	I don't know	4%

Frequency of supplier contact

Once a week 6%

Every two weeks 0%

Once a month 8%

Every three months 6%

Every six months 2%

Yearly 2%

No contact necessary 76%

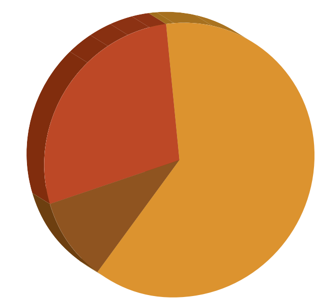
Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand 38%

Keep primary supplier and purchase new brand 62%

National brands vs. private label purchases



62% National

10% Private

28% Both

Reason for buying a particular fuel pump

I don't buy them	75%
Availability	9%
Quality	12%

Insurance company influence on fuel pump service replacement work

None	74%
Some	14%
Moderate	8%
Major	2%
Complete control	2%

Internet ordering frequency

0-10% of the time	91%
11-25% of the time	2%
26-40% of the time	2%
41-60% of the time	0%

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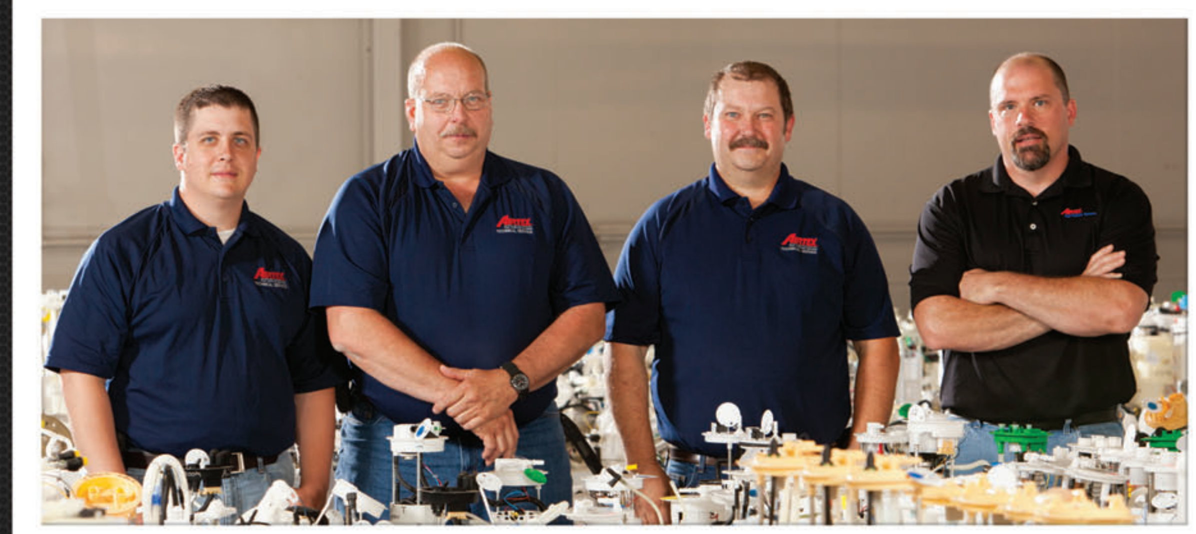

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Mirrors

MAINTAINING CUSTOMERS

91% have no plans to expand their mirror offerings in the next 12 months.

Purchasing source

Auto parts retailer	30%
Dealership	86%
Jobber	21%
Direct from manufacturer	7%
Warehouse distributor	23%

Preferred purchasing channel

Auto parts retailer	5%
Jobber	7%
Dealership	69%
Warehouse distributor	12%

Main reason for using preferred supplier

Parts availability	35%
Good relationship	17%
Price	13%
Carry specific brands	20%

Margins

22% of respondents report they know how much over the jobber they pay for mirrors.

What techs know they pay		What techs think they pay	
1-5%*	20%	1-5%*	7%
6-10%*	28%	6-10%*	19%
11-15%*	12%	11-15%*	26%
16-25%*	12%	16-25%*	32%
More than 25%	28%	More than 25%	16%

*Percent over jobber

Amount of this product that is returned

None	66%	5-9%	5%
1-2%	18%	10% +	2%
3-4%	7%	I don't know	2%

Frequency of supplier contact

Once a week 2%
Every two weeks 2%
Once a month 2%
Every three months 2%
Every six months 0%
Yearly 2%
No contact necessary 90%

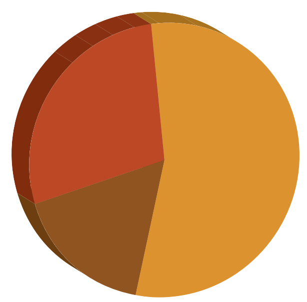
Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand 37%

Keep primary supplier and purchase new brand 63%

National brands vs. private label purchases



55% National
17% Private
28% Both

Reason for buying a particular mirror

It is OEM	52%
Availability	38%
Quality	33%

Insurance company influence on mirror service replacement work

None	29%
Some	29%
Moderate	19%
Major	17%
Complete control	6%

Internet ordering frequency

0-10% of the time	88%
11-25% of the time	3%
26-40% of the time	2%
41-60% of the time	3%

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Wheel Bearings

90% have no plans to expand their wheel bearing offerings in the next 12 months.

Purchasing source

Auto parts retailer	66%
Dealership	72%
Jobber	23%
Direct from manufacturer	5%
Warehouse distributor	18%

Preferred purchasing channel

Auto parts retailer	27%
Jobber	9%
Dealership	51%
Warehouse distributor	9%

Main reason for using preferred supplier

Fast delivery	22%
Good relationship	19%
Parts availability	21%
Carry specific brands	21%

Margins

22% of respondents report they know how much over the jobber they pay for this.

What techs know they pay		What techs think they pay	
1-5%*	31%	1-5%*	16%
6-10%*	38%	6-10%*	15%
11-15%*	6%	11-15%*	26%
16-25%*	6%	16-25%*	25%
More than 25%	19%	More than 25%	18%

*Percent over jobber

Amount of this product that is returned

None	74%	5-9%	0%
1-2%	21%	10% +	0%
3-4%	2%	I don't know	3%

Frequency of supplier contact

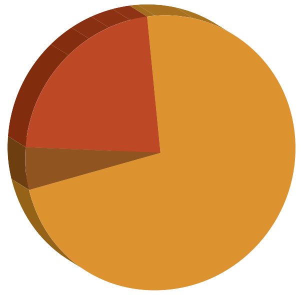
Once a week	4%
Every two weeks	0%
Once a month	5%
Every three months	4%
Every six months	1%
Yearly	2%
No contact necessary	84%

Brand vs. supplier loyalty

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

Change suppliers to continue purchasing original brand	37%
Keep primary supplier and purchase new brand	63%

National brands vs. private label purchases



73% National
5% Private
22% Both

Reason for buying a particular wheel bearing

It is OEM	24%
Availability	22%
Quality	21%

Insurance company influence on wheel bearing service replacement work

None	57%
Some	18%
Moderate	10%
Major	11%
Complete control	4%

Internet ordering frequency

0-10% of the time	95%
11-25% of the time	1%
26-40% of the time	1%
41-60% of the time	1%

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