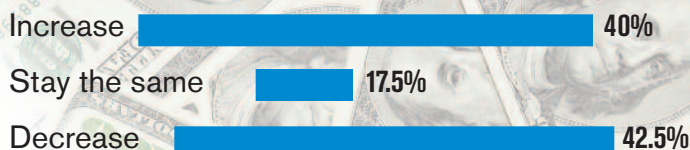


Market Profile

What You're Earning and Where Your Business Comes From

Compared to 2009, Did Your 2010 Sales:



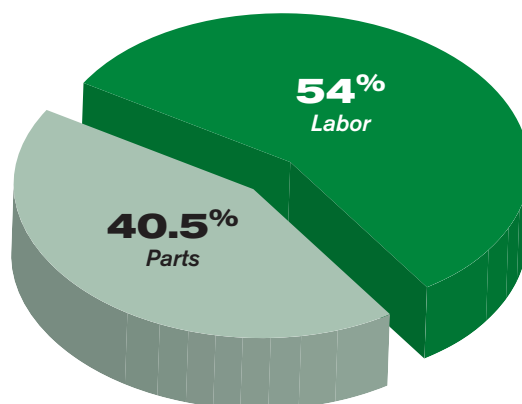
Average Annual Gross Sales Volume

DRP Shop Average	\$944,658
Non-DRP Shop Average	\$438,922
Industry Average	\$691,790

Annual Gross Sales 1994-2011



What Percentage of Your Sales is Attributed to Parts and Labor?

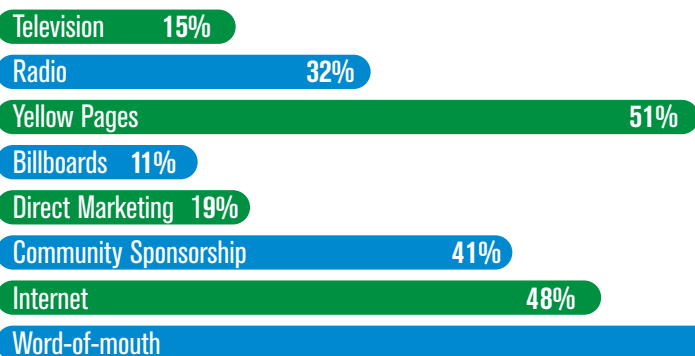


On average, gross profit margin is 29% on parts and 48% on labor.

How Much Business is Generated from Each Source?

Advertising/Direct Sales	10%
Direct Repair Programs	30%
Fleets	6%
Insurance Referral	9%
Word-of-Mouth	38%
Car Dealer	5%
Other	2%

How Do You Market Your Services?





What Shops Spend **Annually** on Advertising

Note: This is the median, which means that 50% of respondents report figures higher than the median and 50% report figures lower.

We received too few responses to report any reliable data on the average amount spent per year on advertising for DRP shops and non-DRP shops. But in our past studies, the DRP shops' advertising budgets comprised a smaller percentage of their total annual sales than non-DRP shops, which makes sense because DRP

shops can rely on their partner insurers to send them work. Still, one would think that non-DRP shops, since they have a much greater need to generate volume on their own, would spend a much higher percentage of their total annual sales on advertising than DRP shops. The difference historically, however, has been minimal.



How Will Business Be?



How's Business?

39% of all shop owners say their businesses are better off today than five years ago.

38% of DRP shop owners say their businesses are better off today.

36% of non-DRP shop owners say their businesses are better off today.

58% of all shop owners say their businesses aren't better off today than five years ago.

58% of DRP shop owners say their businesses aren't better off today.

57% of non-DRP shop owners say their businesses aren't better off today.