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Weekly Vehicle Maintenance Monitor

Week Beginning: August 10th, 2020

Wave 5\ Week 33



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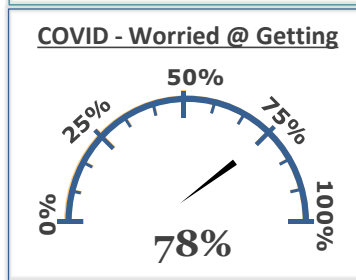
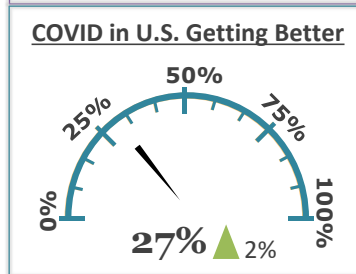
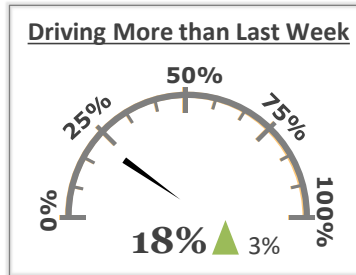
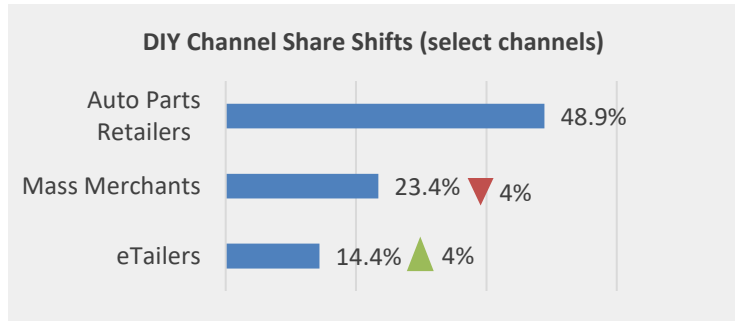
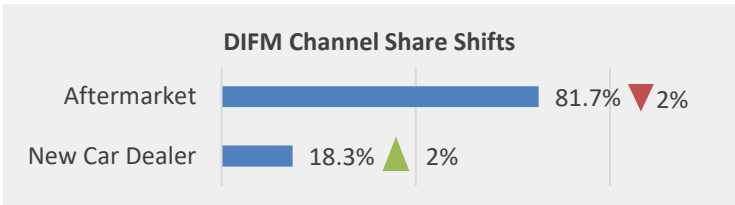
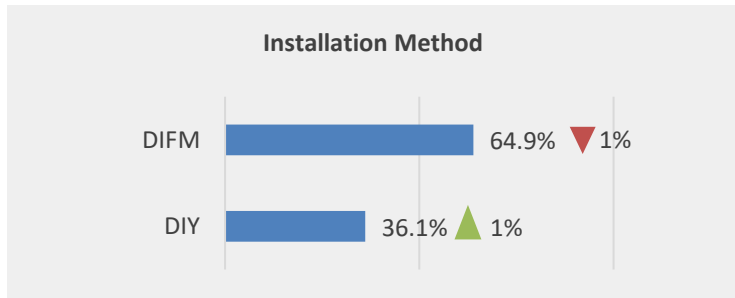
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Dashboard: This Week (August 10th, 2020 – August 16th, 2020) vs. Last Week

HHLDs Performing Maintenance	Delayed Maintenance	New DIYers
45% ---	36% ▲4%	21% ▲8%



Top 2 Box "Likely"	If a vehicle in your hhd needed maintenance\repair today, would you:
---	Perform the maintenance/repair yourself even if you've never done it before
---	Look for the least expensive option for maintenance/repair
---	Purchase parts from online only sources (like Amazon, eBay, RockAuto, etc)
▲2%	Pay more for higher quality, longer lasting automotive parts
▼4%	Research auto parts brands
▼2%	Research reviews for vehicle repair shops
	Take advantage of a financing option for a major or costly repair(s)
	Choose a repair shop that offers a 'touchless' customer experience
	Accept an appointment in the future for your vehicle's next scheduled maintenance

Top 2 Box "Worried"	How worried are you about:
▲3%	Taking my vehicle to a repair shop for service
---	Shopping in-store at an auto parts retailer (AutoZone, Advance, O'Reillys, etc)
---	Shopping in-store at a discount\mass-merchant (Walmart, Target, Costco, etc)
---	Travelling on public transportation
---	Travelling via Ride Sharing (Uber, Lyft, etc)

This Week's Highlights (August 10th, 2020 – August 16th, 2020)

- DIY [channel share](#) among auto parts retailers and households performing maintenance last week (overall) did not change from last week. However, households performing maintenance in the West region decreased about 4% from last week. Conversely, households performing maintenance in the Northeast region increased 4% from last week.
- Among vehicles reported in the survey, 44.5% had some sort of [maintenance/repair](#) done over the past week. Among those households, 36.1% performed those repairs as DIYers. Additionally, 21.3% of those DIYers reported being first time DIYers.
- Among vehicles reported in the survey, 36.2% had some sort of [maintenance/repair](#) delayed over the past week. Among those households, 33.9% intended to perform those repairs as DIYers. Additionally, 17.2% of those consumers that intended to be DIYers reported being first time DIYers.
- 17.9% of consumers reported [driving more](#) over the past week which is about a 3% increase from the previous week (15.3% in W4). However, 31.9% of consumers in urban neighborhoods reported driving more over the past week which is 14% higher than the national average.

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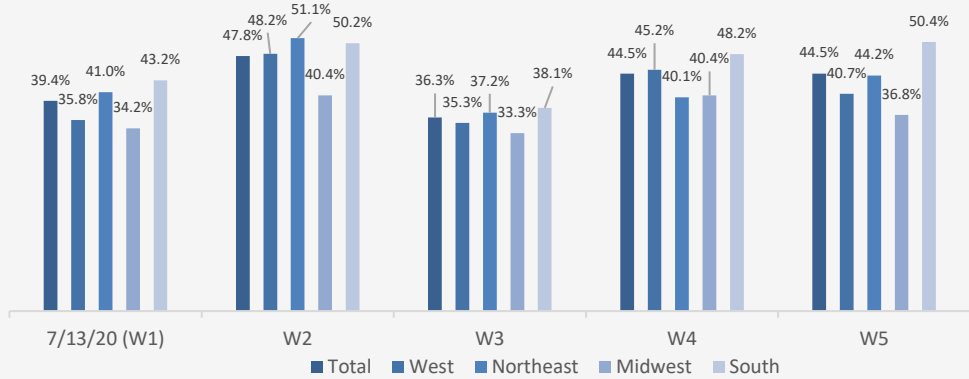
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Last Week Maintenance

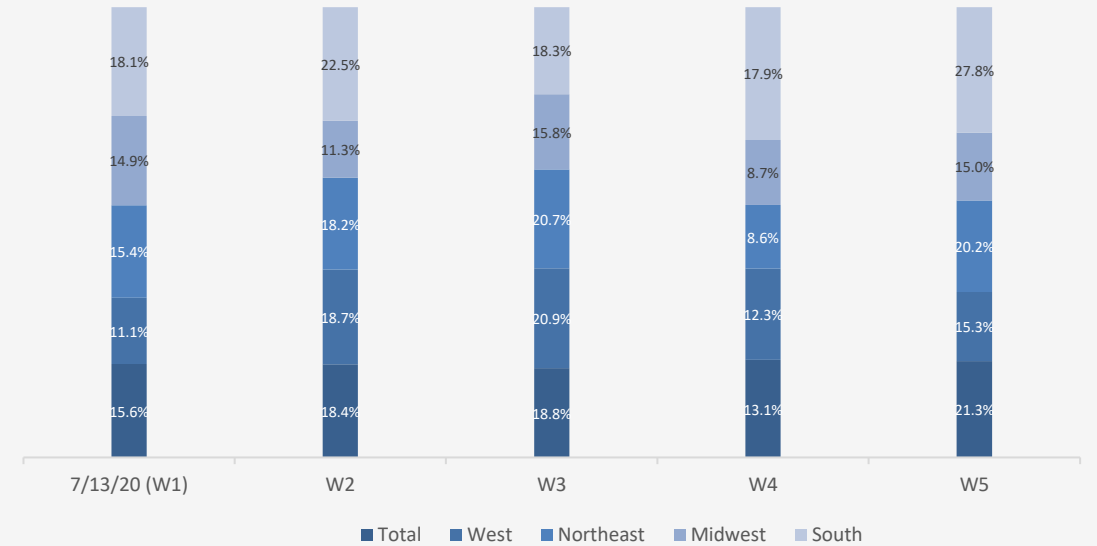
Maintenance Performed Last Week

% of Vehicles with Maintenance\Repairs Performed Last Week



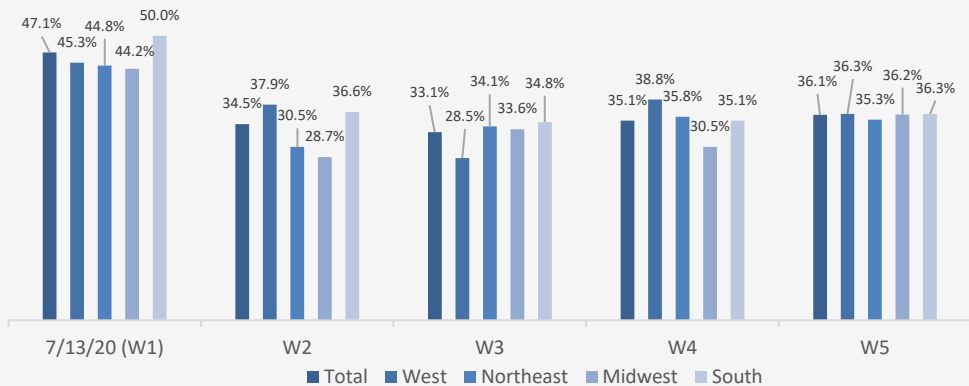
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% of Respondents as First Time DIYers



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% of Maintenance\Repairs Performed as DIY



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% of Respondents as First Time DIYers

	Total %	Millennial %	Gen X %	Boomer %	Silent %*
% of Households Performing Repair as DIY for First Time	21.3	35.9	17.0	7.6	0.0

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Maintenance Performed Last Week – Channel Share

DIY Channel Share	Total			West			Northeast			Midwest			South		
<i>Channel</i>	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %
Auto Parts Retailer	50.6	49.9	48.9	50.0	47.6	48.8	64.1	54.3	59.6	47.7	38.2	50.8	47.3	53.6	45.7
Discount Store-Mass Merchandiser	21.5	27.9	23.4	21.4	26.8	26.3	25.6	23.9	19.1	22.7	40.0	19.7	19.6	25.6	24.5
Online Parts Sources	16.0	9.7	14.4	14.3	7.3	11.3	10.3	13.0	10.6	9.1	5.5	11.5	21.4	11.3	17.6
Auto Parts Wholesaler	10.5	10.3	11.4	14.3	18.3	10.0	0.0	8.7	10.6	15.9	9.1	14.8	10.7	7.1	11.2
Other	1.3	2.3	1.9	0.0	0.0	3.8	0.0	0.0	0.0	4.5	7.3	3.3	0.9	2.4	1.1

DIFM Channel Share	Total			West			Northeast			Midwest			South		
<i>Channel</i>	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %
New\Used Car Dealer	18.0	15.9	18.3	16.4	20.4	20.9	26.4	20.0	14.4	18.6	19.3	17.8	15.3	12.4	18.5
Auto Parts Retailer	23.6	20.4	20.7	24.2	20.4	23.0	29.6	19.2	19.7	15.0	20.4	21.7	24.7	20.6	19.8
Quick Lube Specialist	12.6	14.4	14.7	15.8	15.0	13.6	7.2	12.3	15.2	9.3	18.2	15.3	14.6	13.5	14.8
Independent Repair Shop	15.9	15.5	15.8	18.8	14.6	15.7	12.0	20.8	18.2	15.7	11.6	17.2	15.9	15.9	15.0
Discount Store-Mass Merchandiser	12.3	12.2	11.3	7.9	10.2	10.5	11.2	9.2	15.2	14.3	15.5	10.8	14.3	12.5	10.8
Tire Dealer	6.8	9.0	7.7	6.1	8.7	7.3	4.0	6.9	5.3	11.4	5.5	7.6	6.2	10.7	8.4
National Repair Chain	3.4	4.5	3.8	7.3	4.4	3.1	1.6	4.6	4.5	5.0	3.9	1.9	1.3	4.7	4.4
Repair Specialist	3.8	4.4	4.8	1.2	2.9	3.1	4.0	4.6	5.3	5.7	2.8	4.5	4.2	5.4	5.4
Collision Repair Shop	2.3	3.2	2.0	1.8	2.9	2.1	3.2	1.5	1.5	3.6	2.2	2.5	1.6	3.9	2.0
Other	1.4	0.5	0.8	0.6	0.5	0.5	0.8	0.8	0.8	1.4	0.6	0.6	1.9	0.3	1.0

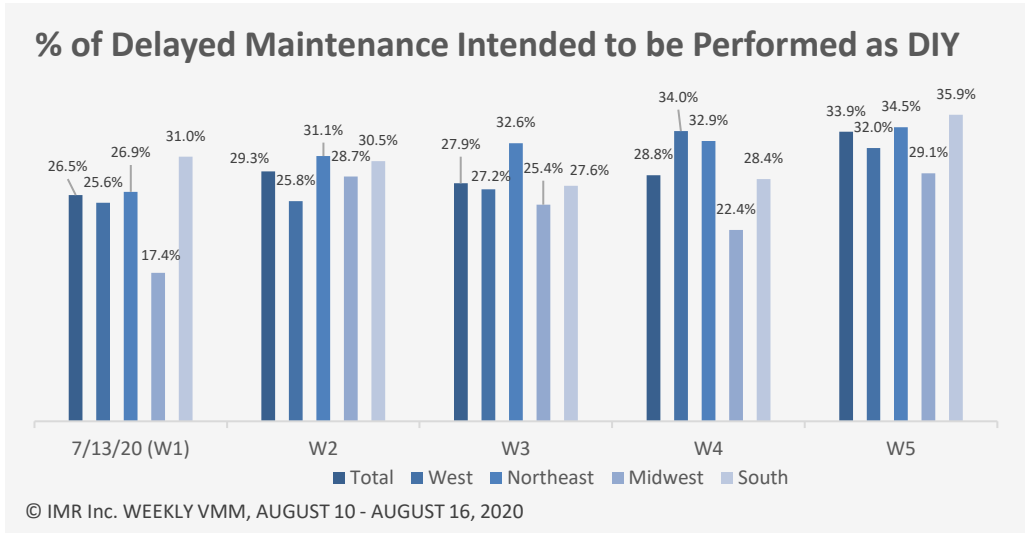
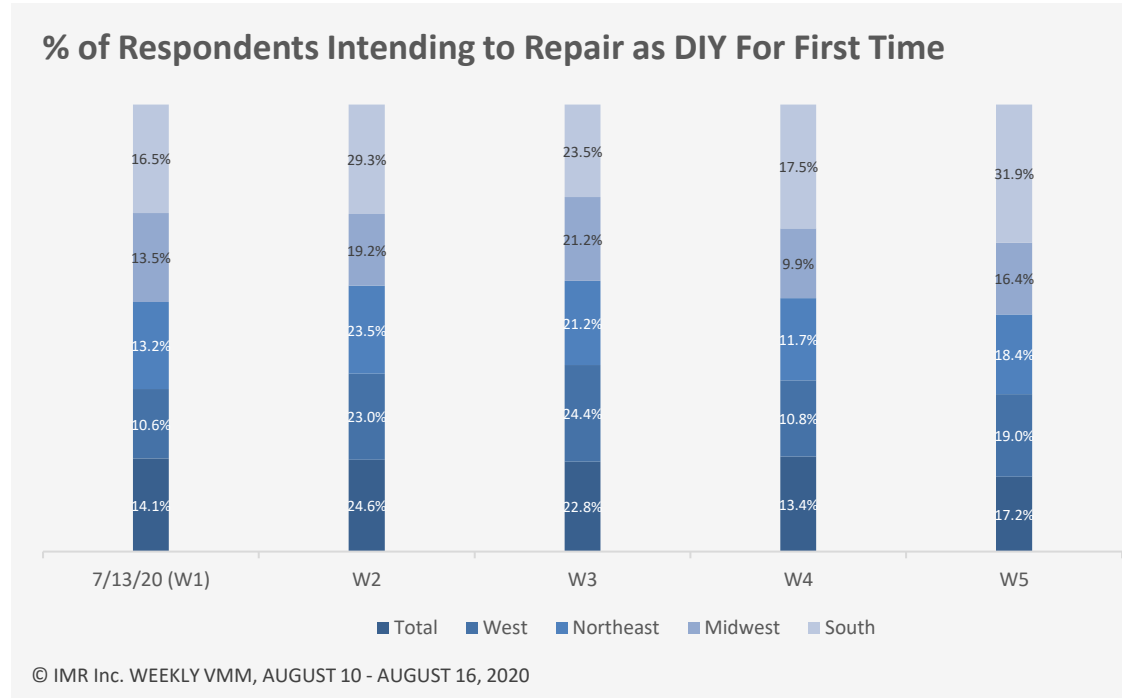
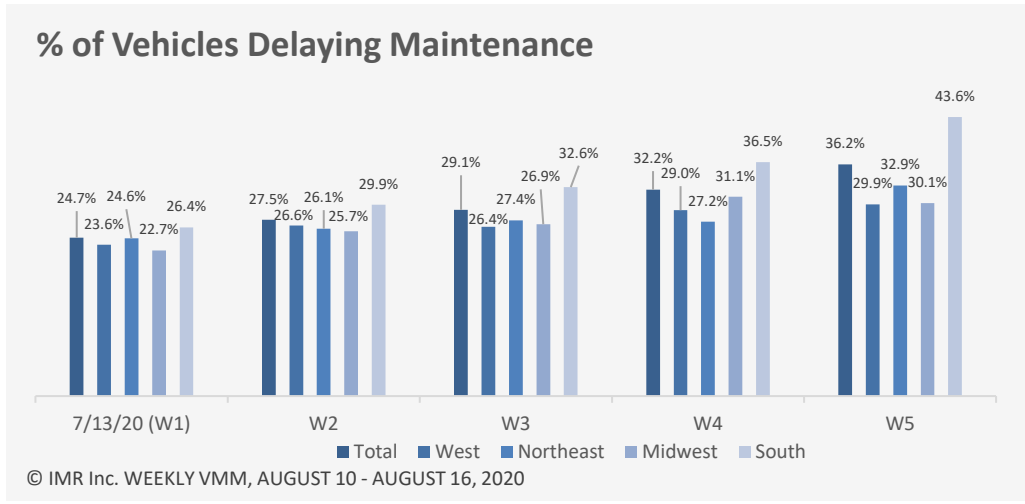
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Delayed Maintenance

Delayed Maintenance



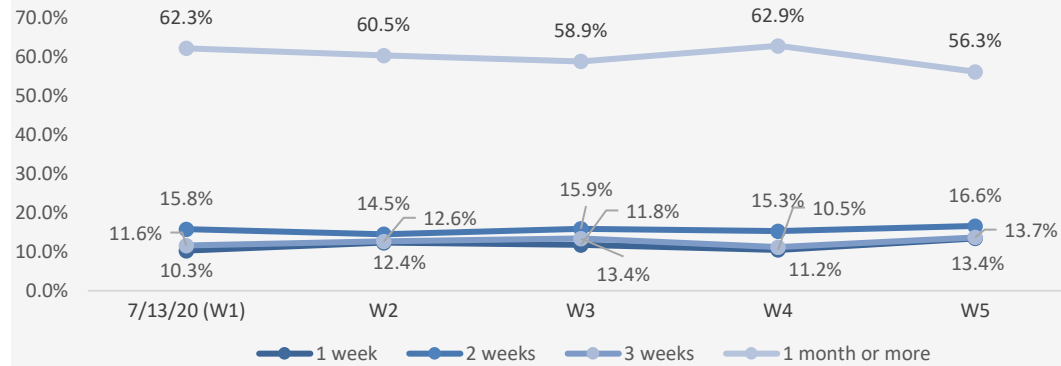
% of Respondents Intending to repair as DIY For First Time

	Total %	Millennial %	Gen X %	Boomer %	Silent %*
% of Households Performing Repair as DIY for First Time	17.2	44.7	17.6	5.2	3.3

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Delayed Maintenance Timeframes

Delayed Maintenance Time to Market



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Delayed Maintenance Time to Market by Generations

	Total %	Millennial %	Gen X %	Boomer %	Silent %*
1 week	13.4	13.0	14.8	10.8	0.0
2 weeks	16.6	17.5	17.7	13.3	0.0
3 weeks	13.7	14.5	12.9	6.0	0.0
1 month or more	56.3	55.0	54.5	69.9	100.0

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Delayed Maintenance Time to Market by Urbanicity

	Total %	Urban %	Suburban %	Rural %
1 week	13.4	14.9	10.9	14.7
2 weeks	16.6	17.8	16.7	12.4
3 weeks	13.7	17.6	10.9	7.0
1 month or more	56.3	49.8	61.5	65.9

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Delayed Maintenance Time to Market by Region

	Total %	West %	Northeast %	Midwest %	South %
1 week	13.4	16.6	19.0	9.0	12.5
2 weeks	16.6	16.6	17.1	12.8	17.5
3 weeks	13.7	14.6	11.4	11.3	14.5
1 month or more	56.3	52.3	52.4	66.9	55.4

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*Small Sample Size



Delayed Maintenance – Channel Share Intention

DIY Channel Share Intention	Total			West			Northeast			Midwest			South		
	W3 %	W4 %	W5 %	W3 %*	W4 %*	W5 %*	W3 %*	W4 %*	W5 %*	W3 %*	W4 %	W5 %*	W3 %	W4 %	W5 %
Auto Parts Retailer	39.2	45.1	42.5	34.5	53.1	28.9	51.7	40.6	54.2	42.9	57.9	50.0	35.0	40.7	43.3
Discount Store-Mass Merchandiser	23.5	22.6	23.7	20.7	21.9	26.3	20.7	25.0	29.2	21.4	10.5	22.2	26.3	24.7	22.0
Online Parts Sources	21.7	20.1	22.7	24.1	12.5	21.1	17.2	21.9	8.3	17.9	26.3	22.2	23.8	21.0	26.0
Auto Parts Wholesaler	13.3	9.1	10.1	20.7	6.3	21.1	3.4	12.5	8.3	17.9	5.3	0.0	12.5	9.9	8.7
Other	2.4	3.0	1.0	0.0	6.3	2.6	6.9	0.0	0.0	0.0	0.0	5.6	2.5	3.7	0.0

DIFM Channel Share Intention	Total			West			Northeast			Midwest			South		
	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %	W3 %	W4 %	W5 %
New\Used Car Dealer	15.7	15.0	10.8	17.8	21.3	7.5	21.1	18.9	5.2	14.6	10.3	16.4	13.7	13.6	11.7
Auto Parts Retailer	18.5	20.6	20.8	15.5	22.3	20.8	25.3	23.4	29.3	19.9	15.0	19.4	16.9	20.9	19.7
Quick Lube Specialist	16.1	13.2	18.2	17.8	8.5	20.8	13.7	16.2	12.1	13.2	13.1	11.9	17.6	13.6	19.7
Independent Repair Shop	19.6	17.3	20.0	24.0	12.8	17.9	16.8	17.1	20.7	17.9	27.1	29.9	19.5	15.7	18.6
Discount Store-Mass Merchandiser	10.9	10.1	10.8	7.0	8.5	16.0	9.5	9.9	15.5	8.6	6.5	9.0	14.0	11.7	8.9
Tire Dealer	8.5	9.8	8.4	8.5	8.5	11.3	2.1	3.6	5.2	14.6	9.3	4.5	7.5	12.2	8.9
National Repair Chain	4.1	5.1	6.4	3.9	4.3	4.7	0.0	5.4	10.3	4.6	7.5	7.5	5.2	4.6	6.0
Repair Specialist	3.1	5.1	3.1	4.7	8.5	0.0	5.3	3.6	1.7	2.0	7.5	0.0	2.3	4.1	4.9
Collision Repair Shop	2.1	1.8	1.0	0.0	4.3	0.9	2.1	0.9	0.0	2.6	2.8	0.0	2.6	1.1	1.4
Other	1.5	1.9	0.3	0.8	1.1	0.0	4.2	0.9	0.0	2.0	0.9	1.5	0.7	2.7	0.3

**Small Sample Size*

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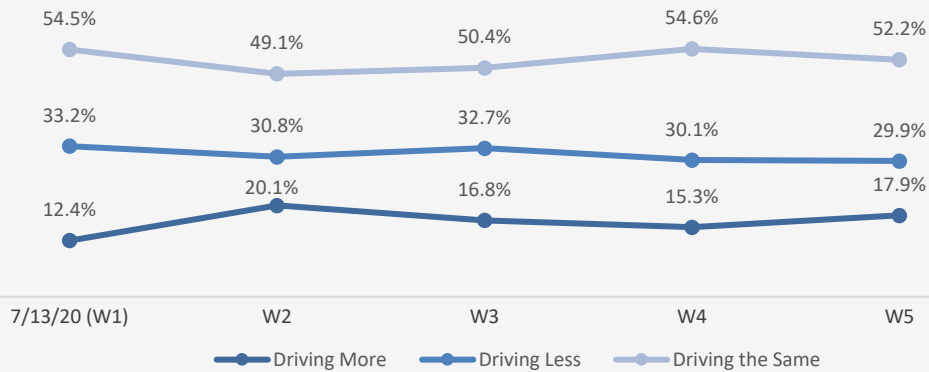
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Vehicle Maintainer Attitudes & Perceptions

Vehicle Maintainer Driving Habit Perceptions

Vehicle Maintainer's Impression of their Driving Habits

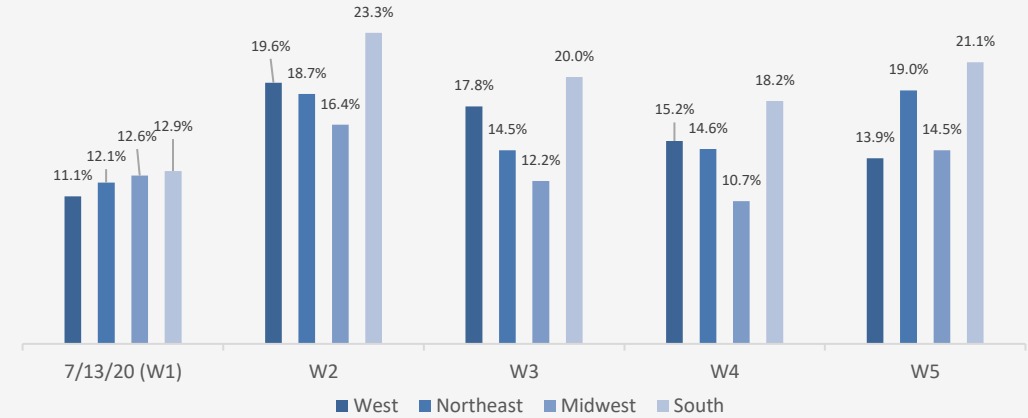
Compared to one week ago, would you say this week you are:



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Vehicle Maintainer's Impression of their Driving Habits

Compared to one week ago, would you say this week you are (Driving More)



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Vehicle Maintainer's Impression of their Driving Habits

Compared to one week ago, would you say this week you are:

	Total %	Urban %	Suburban %	Rural %
Driving More	17.9	31.9	11.9	11.6
Driving Less	29.9	25.2	32.7	30.2
Driving the Same	52.2	42.9	55.4	58.3

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Vehicle Maintainer's Impression of their Driving Habits

Compared to one week ago, would you say this week you are:

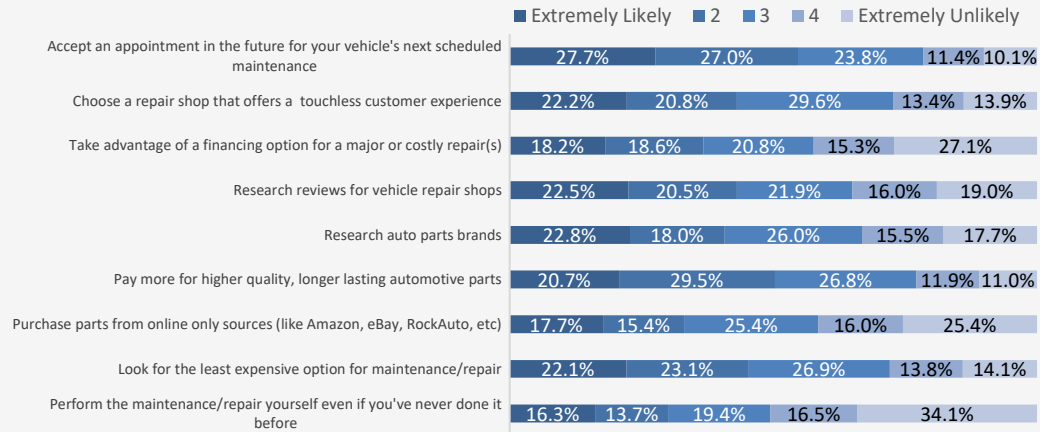
	Total %	West %	Northeast %	Midwest %	South %
Driving More	17.9	13.9	19.0	14.5	21.1
Driving Less	29.9	29.2	25.8	30.9	31.4
Driving the Same	52.2	56.9	55.2	54.6	47.5

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Vehicle Maintenance Sentiment

If a vehicle in your household needed maintenance or repair today, would you:



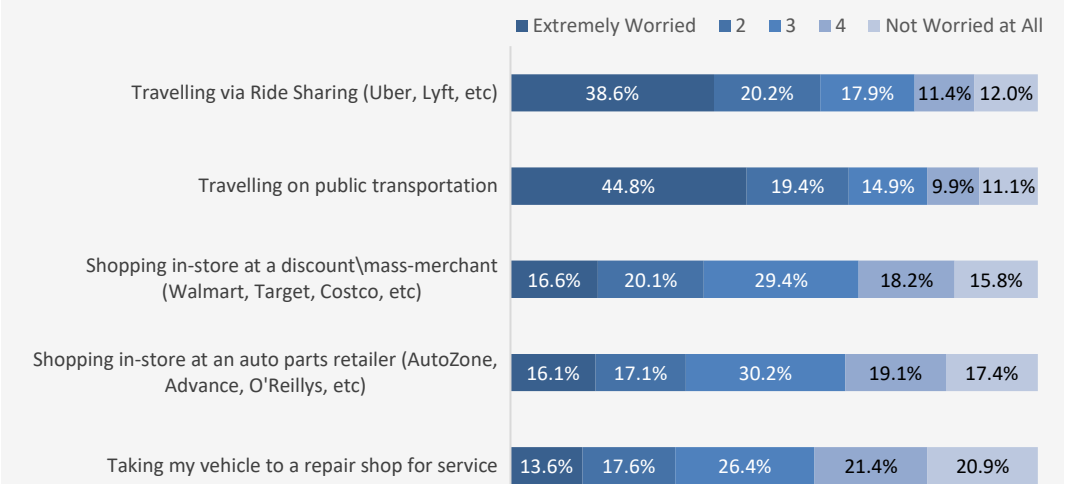
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If a vehicle in your household needed maintenance or repair today, would you:

	% Top 2 Box	Total %	West %	Northeast %	Midwest %	South %
Perform the maintenance/repair yourself even if you've never done it before		30.0	30.1	28.8	25.6	32.6
Look for the least expensive option for maintenance/repair		45.2	43.5	37.4	36.7	53.0
Purchase parts from online only sources (like Amazon, eBay, RockAuto, etc)		33.1	30.6	31.3	30.9	36.0
Pay more for higher quality, longer lasting automotive parts		50.2	53.2	50.9	47.8	49.8
Research auto parts brands		40.8	38.0	36.8	36.7	45.6
Research reviews for vehicle repair shops		43.0	44.9	36.2	34.3	48.9
Take advantage of a financing option for a major or costly repair(s)		36.8	36.1	39.3	27.1	40.8
Choose a repair shop that offers a touchless customer experience		43.0	45.8	42.9	31.4	47.2
Accept an appointment in the future for your vehicle's next scheduled maintenance		54.7	54.2	55.8	47.8	57.8

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How worried are you about being exposed to COVID-19:



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How worried are you about being exposed to COVID-19:

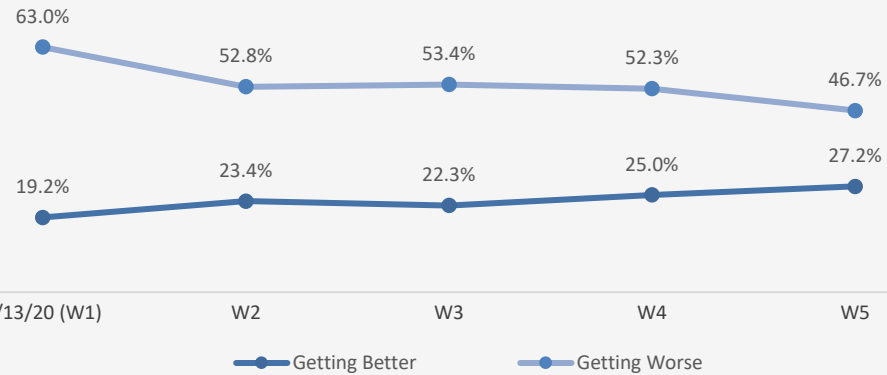
	% Top 2 Box	Total %	West %	Northeast %	Midwest %	South %
Taking my vehicle to a repair shop for service		31.2	38.0	22.7	21.2	35.7
Shopping in-store at an auto parts retailer		33.2	36.1	29.4	25.6	37.0
Shopping in-store at a discount/mass-merchant		36.7	38.4	33.1	28.5	41.1
Travelling on public transportation		64.2	66.7	63.8	60.4	64.9
Travelling via Ride Sharing		58.8	56.4	57.7	55.5	61.7

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Vehicle Maintainer's Pandemic Perceptions

Vehicle Maintainer's Impression of U.S. Coronavirus Situation

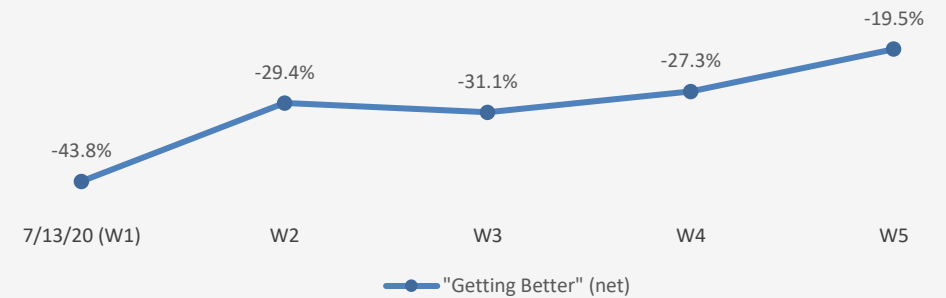
What's your impression of the Coronavirus situation in the U.S. today:



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Vehicle Maintainer's Impression of U.S. Coronavirus Situation

What's your impression of the Coronavirus situation in the U.S. today:



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Vehicle Maintainer's Impression of U.S. Coronavirus Situation

What's your impression of the Coronavirus situation in the U.S. today:

	Total %	West %	Northeast %	Midwest %	South %
Getting Better	27.2	19.9	33.7	24.2	29.8
Getting Worse	46.7	53.2	36.8	49.3	45.9
Net "Getting Better"	-19.5	-33.3	-3.1	-25.1	-16.1

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Vehicle Maintainer's Impression of U.S. Coronavirus Situation

What's your impression of the Coronavirus situation in the U.S. today:

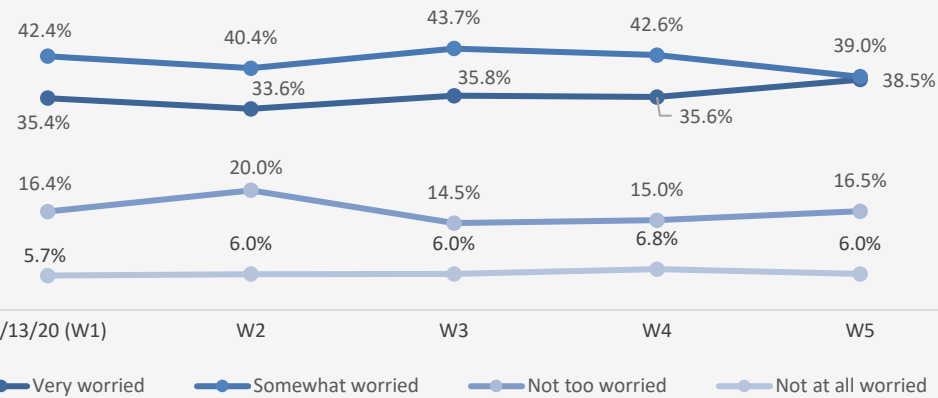
	Total %	Urban %	Suburban %	Rural %
Getting Better	27.2	41.3	19.9	24.1
Getting Worse	46.7	34.2	52.6	50.8
Net "Getting Better"	-19.5	+7.1	-32.7	-26.7

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Vehicle Maintainer's Pandemic Perceptions

Vehicle Maintainer's Concern about Getting Covid-19

How worried are you that you or someone in your family will be exposed to coronavirus (COVID-19)



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Vehicle Maintainer's Concern about Getting Covid-19

How worried are you that you or someone in your family will be exposed to coronavirus (COVID-19):

	Total %	West %	Northeast %	Midwest %	South %
Very Worried	38.5	38.4	36.2	33.3	41.7
Somewhat Worried	39.0	38.0	42.3	42.5	36.7
Not too Worried	16.5	16.2	16.0	19.3	15.6
Not at all Worried	6.0	7.4	5.5	4.8	6.0

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Vehicle Maintainer's Concern about Getting Covid-19

How worried are you that you or someone in your family will be exposed to coronavirus (COVID-19):

	Total %	Millennial %	Gen X %	Boomer %	Silent %*
Very Worried	38.5	42.1	37.3	37.7	30.0
Somewhat Worried	39.0	37.7	42.1	36.7	36.7
Not too Worried	16.5	13.9	15.2	20.4	26.7
Not at all Worried	6.0	6.2	5.5	5.2	6.7

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Vehicle Maintainer's Concern about Getting Covid-19

How worried are you that you or someone in your family will be exposed to coronavirus (COVID-19):

	Total %	Urban %	Suburban %	Rural %
Very Worried	38.5	45.2	36.6	32.7
Somewhat Worried	39.0	36.5	41.1	37.7
Not too Worried	16.5	14.5	16.8	19.1
Not at all Worried	6.0	3.9	5.5	10.6

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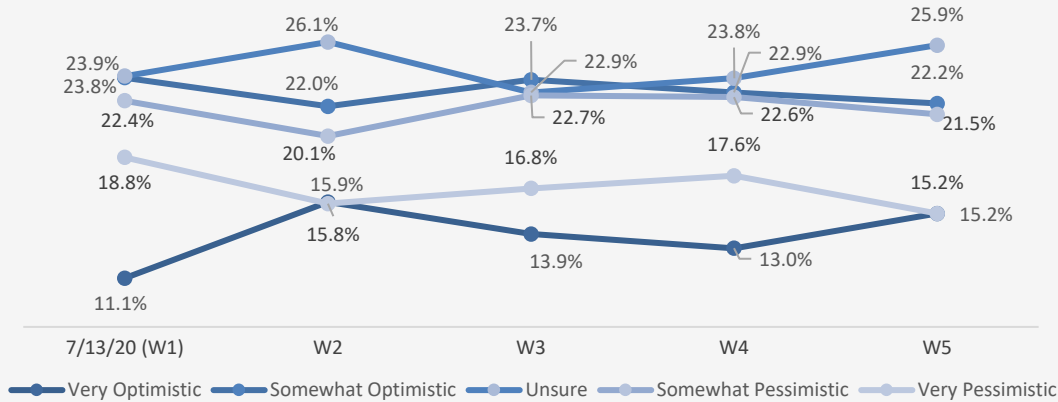
*Small Sample Size



Vehicle Maintainer's Economic Perceptions

Vehicle Maintainer's Economic Optimism

Overall, today, how optimistic are you about the U.S. economy?



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Vehicle Maintainer's Economic Optimism

Overall, today, how optimistic are you about the U.S. economy?

	Total %	West %	Northeast %	Midwest %	South %
Very Optimistic	15.2	11.6	10.4	10.6	20.9
Somewhat Optimistic	22.2	18.5	27.0	26.6	20.2
Unsure	25.9	23.1	27.6	28.5	25.5
Somewhat Pessimistic	21.5	25.5	17.2	21.3	21.3
Very Pessimistic	15.2	21.3	17.8	13.0	12.2

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Vehicle Maintainer's Economic Optimism

Overall, today, how optimistic are you about the U.S. economy?

	Total %	Millennial %	Gen X %	Boomer %	Silent %*
Very Optimistic	15.2	27.5	11.8	6.9	16.7
Somewhat Optimistic	22.2	17.9	20.9	25.3	26.7
Unsure	25.9	26.0	26.1	24.6	26.7
Somewhat Pessimistic	21.5	16.5	23.9	24.2	30.0
Very Pessimistic	15.2	12.1	17.3	19.0	0.0

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Vehicle Maintainer's Economic Optimism

Overall, today, how optimistic are you about the U.S. economy?

	Total %	Urban %	Suburban %	Rural %
Very Optimistic	15.2	20.4	8.9	13.1
Somewhat Optimistic	22.2	23.6	22.3	23.3
Unsure	25.9	21.7	24.5	25.2
Somewhat Pessimistic	21.5	19.1	25.0	21.8
Very Pessimistic	15.2	15.2	19.4	16.5

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*Small Sample Size

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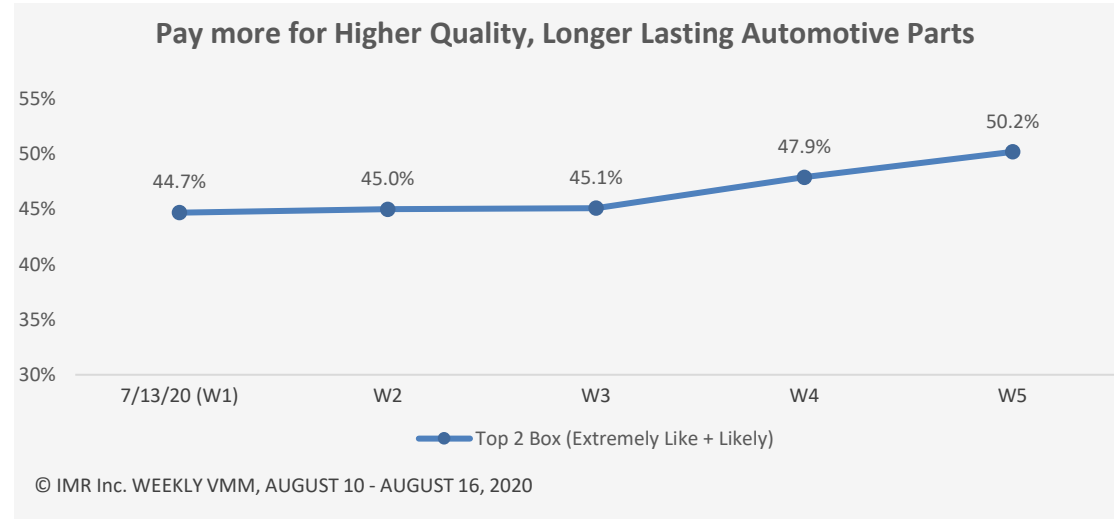
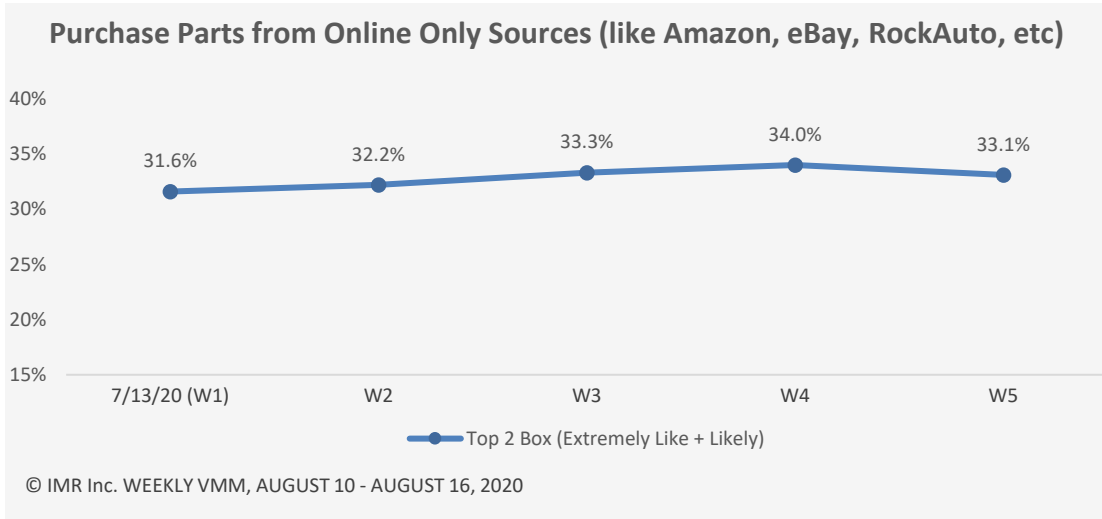
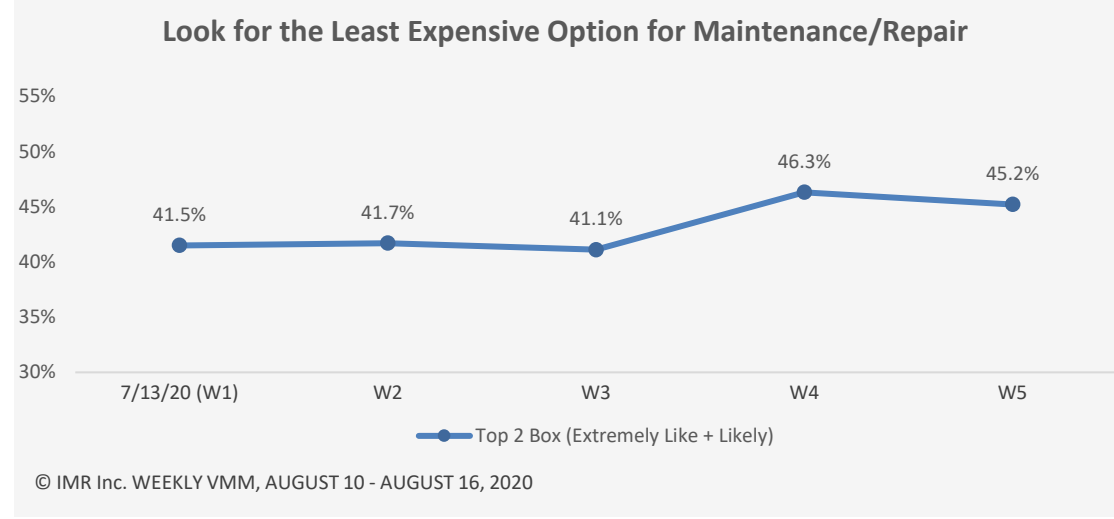
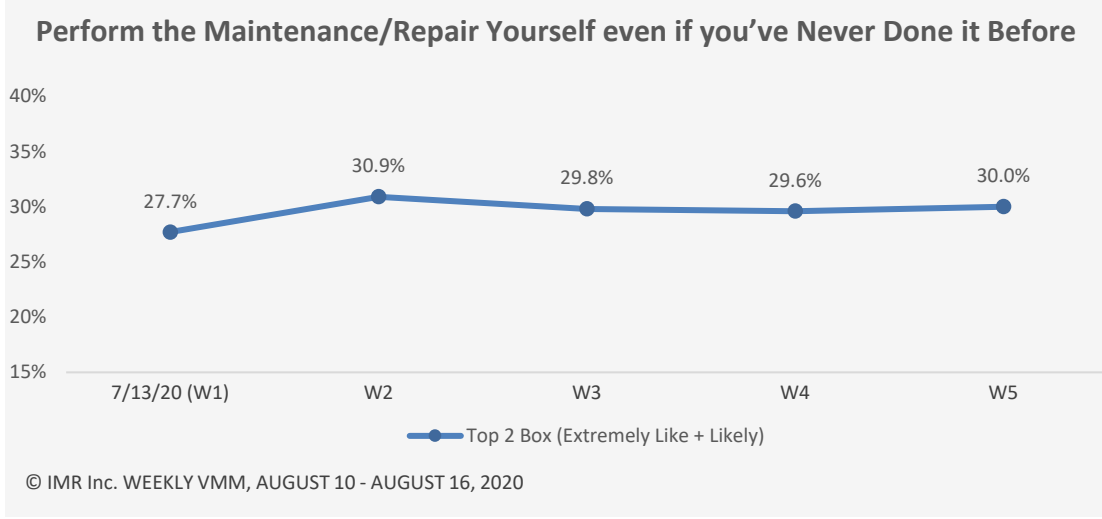
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Sentiment/Attitude Trends

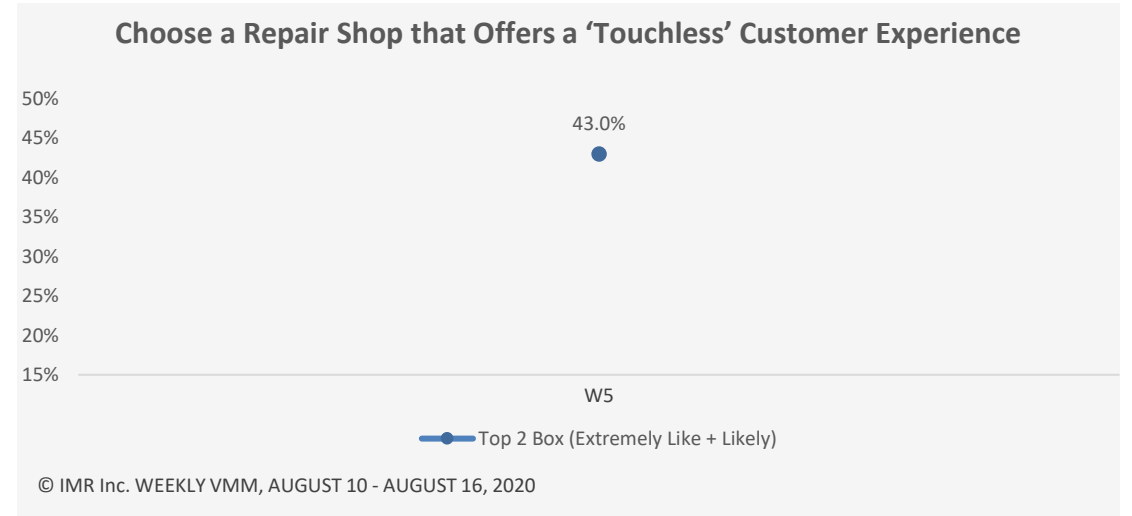
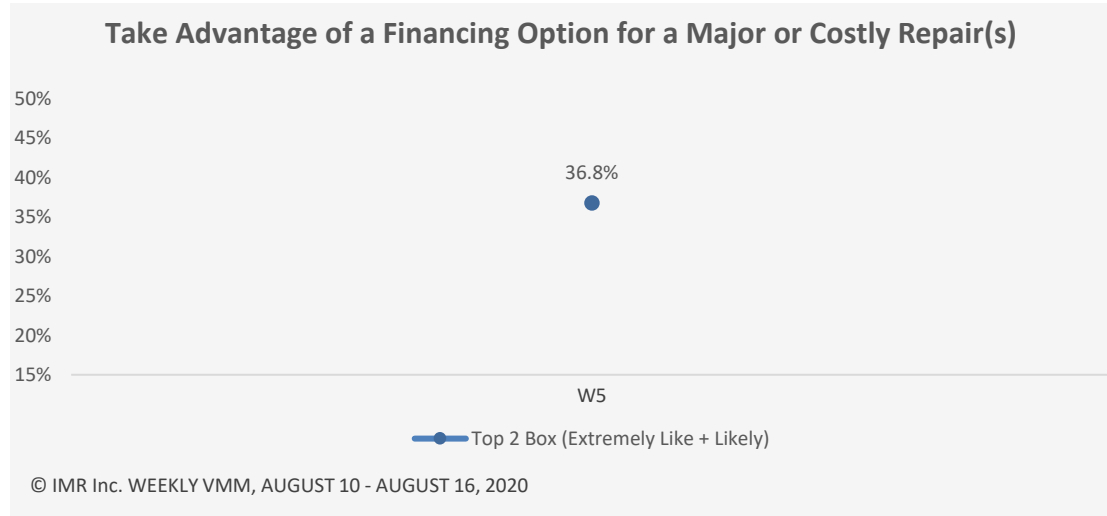
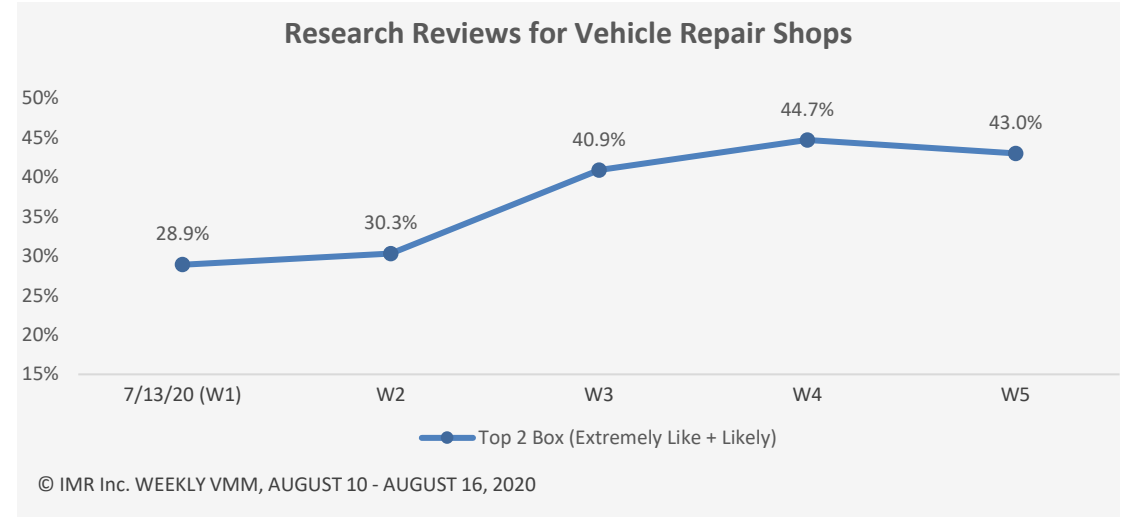
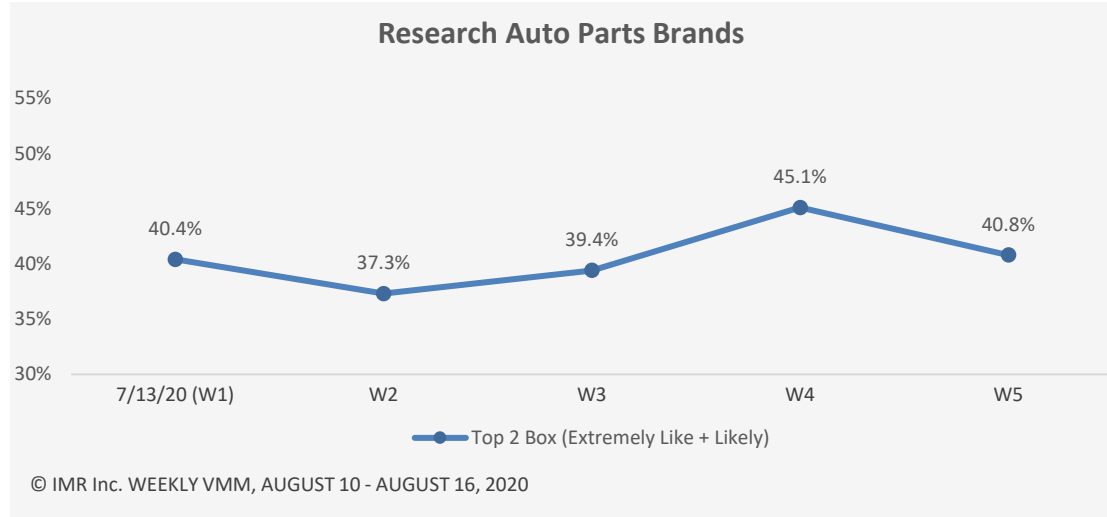


If a vehicle in your household needed repair/maintenance today would you:



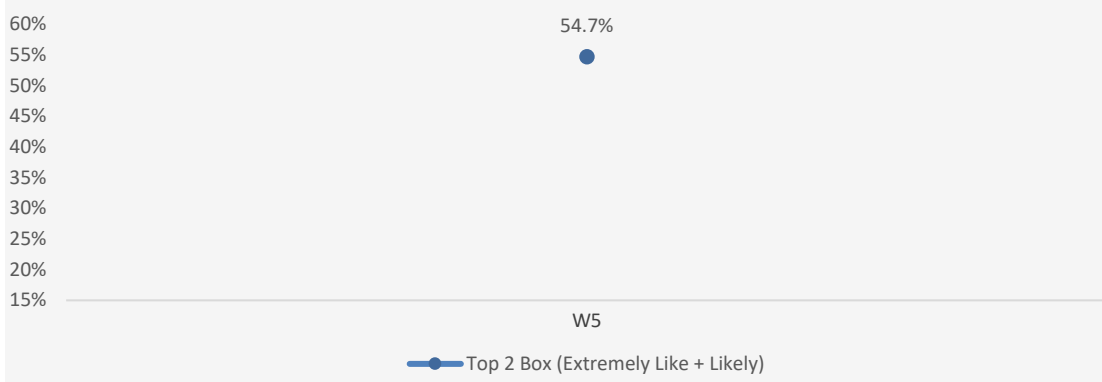


If a vehicle in your household needed repair/maintenance today would you:



If a vehicle in your household needed repair/maintenance today would you:

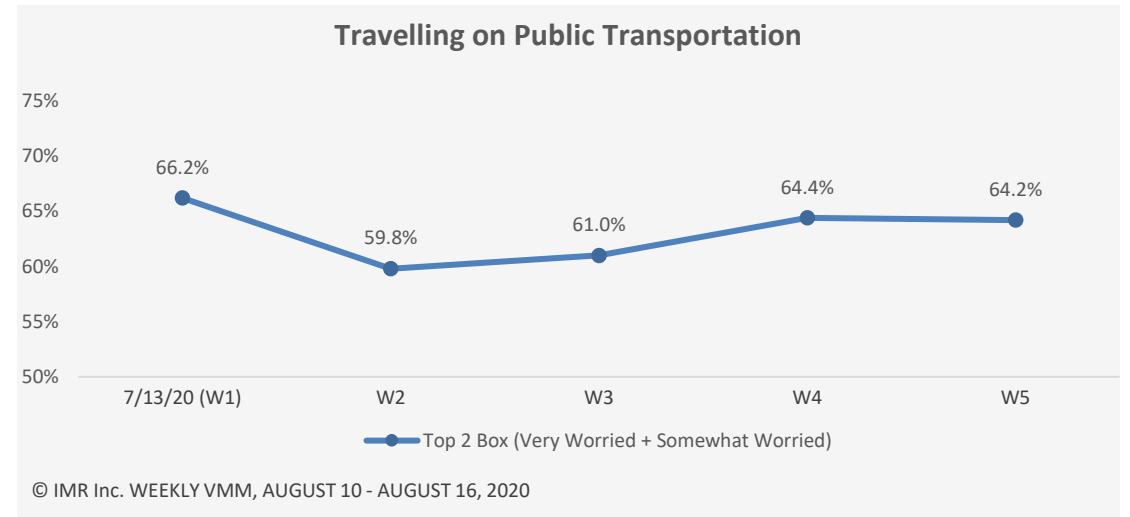
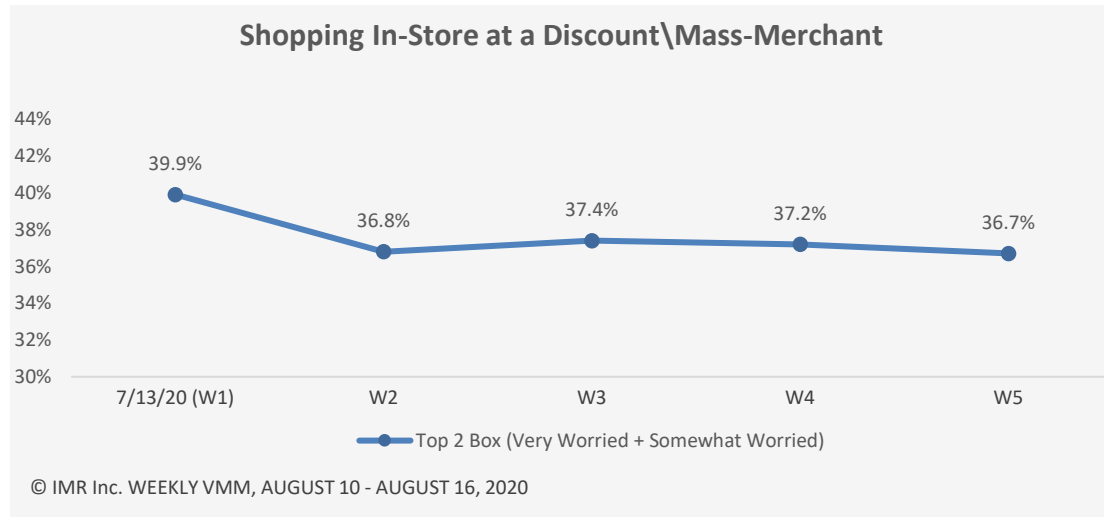
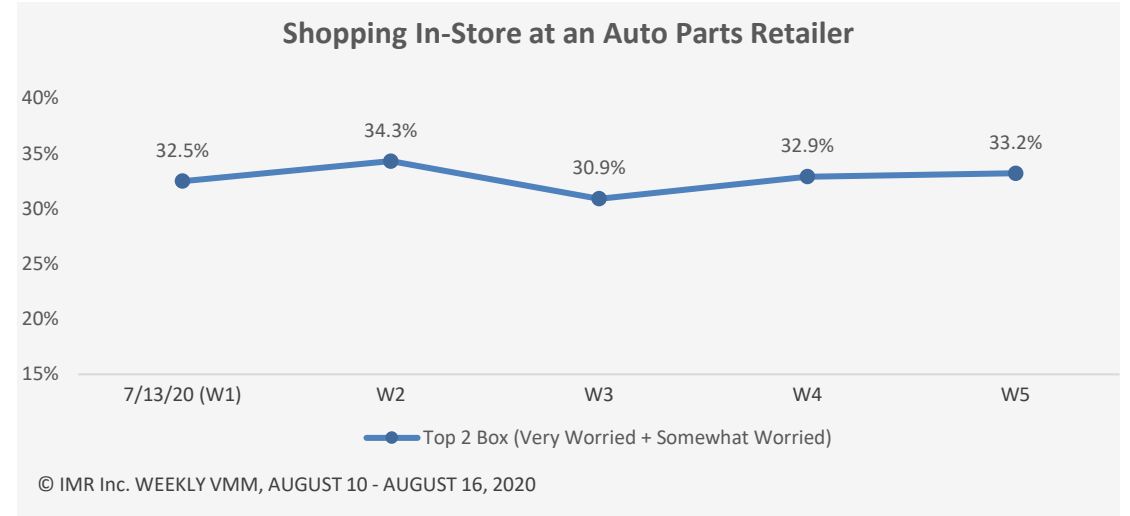
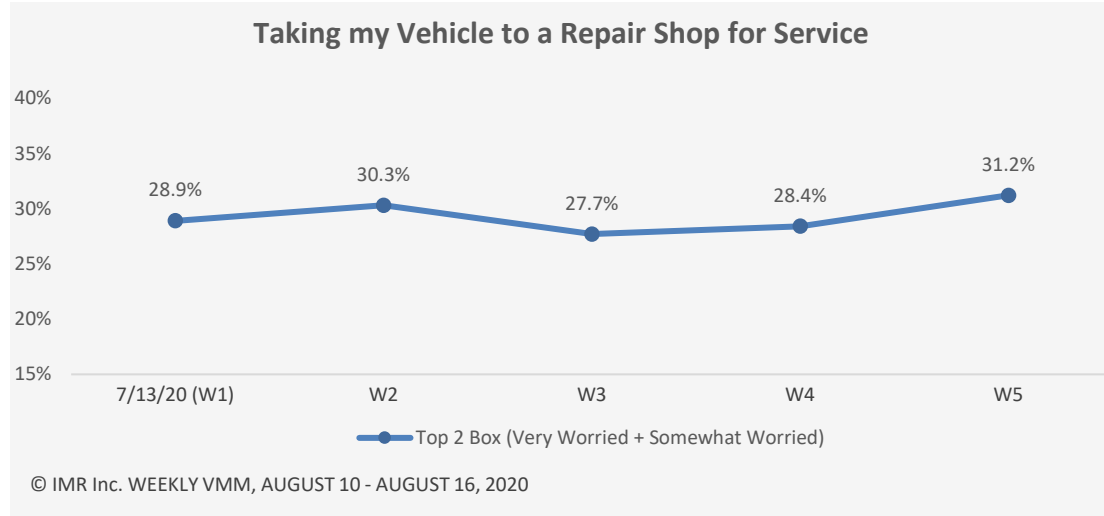
Accept an Appt. in the Future for your Vehicle's Next Scheduled Maintenance



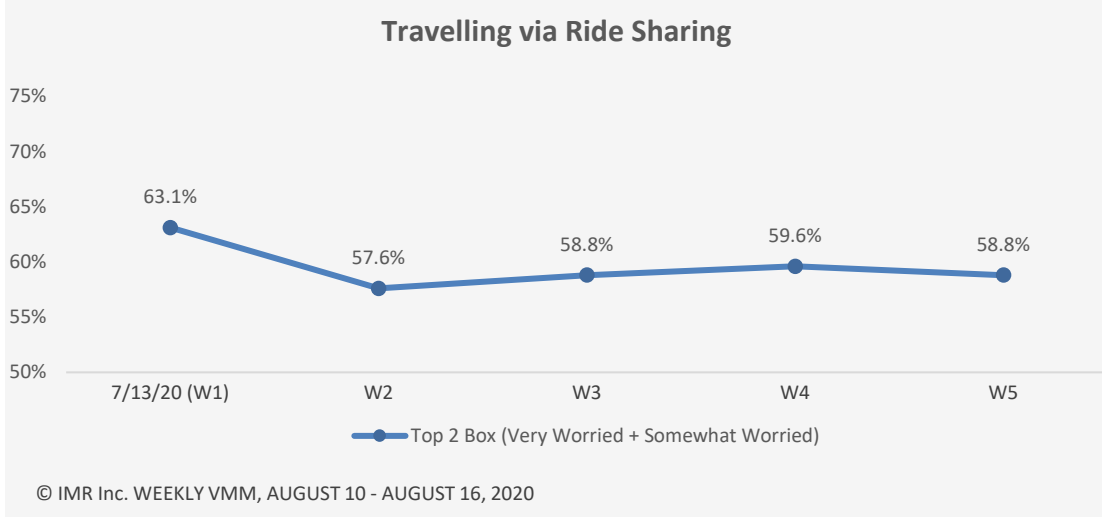
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How worried are you that you will be exposed to COVID-19:



How worried are you that you will be exposed to COVID-19:



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Methodology

IMR's Weekly Vehicle Maintenance Monitor is designed to track vehicle maintenance behavior (both performed and delayed) as well as other important behavior and attitudes to help companies understand how consumers are approaching these topics amid the pandemic and changing economic landscape.

1.5k - 2.0k
Vehicles Weekly

1,000k
Weekly Households Surveyed

Weekly Trends On:

Maintenance Performed
Maintenance Delayed
Channel Share
Purchase Intentions
DIY vs DIFM
1st Time DIYer
Behavior & Attitudes
Driving Behavior
Economic Attitudes
COVID-19 Attitudes

- Questionnaire requests information on vehicle maintenance for specific automotive parts and services purchased during the prior week, maintenance that has been delayed as well as other relevant automotive maintenance behavior and attitudes.
- Sample is nationally representative by age, income, region, ethnicity, gender, geography and other relevant demographic factors

Weekly Vehicle Maintenance Monitor Topics

Weekly Maintenance & Repairs Performed

Weekly Maintenance/Repairs Performed

- What Parts/Services Performed
- DIY/DIFM
- Where Purchased/Performed

Delayed Maintenance

Delayed Maintenance

- What Parts/Services Delayed
- Time to Market
- DIY/DIFM Intention
- Likely Channel Intention

Pre-Covid Employment/Travel Metrics

1st Time (ever) DIYer

Pre-Covid Employment/Travel Metrics:

- Employment Status
- Days Worked at Home
- Days Worked in Office
- Primary Mode of Transportation
- Avg Roundtrip Miles Travelled to Work

Current Employment/Travel Metrics

Current Employment/Travel Metrics:

- Employment Status
- Days Worked at Home
- Days Worked in Office
- Primary Mode of Transportation
- Avg Roundtrip Miles Travelled to Work

If Vehicle Needed Repair Today Perceptions

If Vehicle Needed Repair/Maintenance Today Perception:

- Perform the maintenance/repair yourself even if you've never done it before
- Look for the least expensive option for maintenance/repair
- Purchase parts from online only sources
- Pay more for higher quality, longer lasting automotive parts
- Research auto parts brands
- Research reviews for vehicle repair shops

Perceptions About Exposure to COVID-19

Perception About Exposure to COVID-19:

- Taking my vehicle to a repair shop for service
- Shopping in-store at an auto parts retailer
- Shopping in-store at a discount/mass-merchant
- Travelling on public transportation
- Travelling via Ride Sharing

General Perceptions

General Perceptions:

- Weekly Driving Sentiment (more/less/same)
- Repair Now vs Delay Repair Sentiment
- Impression of coronavirus situation in U.S.
- Worry about getting coronavirus
- Current perception of the economy

Parts, Services and Chemicals Tracked

Specific Parts and Services	Air Filter
	Antifreeze Added
	Battery (Car)
	Brake Discs/Rotors
	Brake Pads
	Cabin Air Filter
	Headlamp Bulb(s)
	Oil Changed
	Tires (New)
	Wiper Blades
Other Parts and Services	Braking System (e.g. calipers, brake hose, brake fluid, other brake parts, etc.)
	Chemicals (e.g. wiper fluid, gas treatment, oil treatment, octane booster, leak stoppers, engine cleaners, etc.)
	Collision, Paint & Body (e.g. grills, doors, fenders, paint/dent repair, etc.)
	Computer & Emissions Control (e.g. oxygen sensors, catalytic converter, engine computer/ECU, etc.)
	Electrical (e.g. battery cable, fuses, etc...)
	Exhaust (e.g. muffler, tail pipe, catalytic converter, etc...)
	Ignition & Engine Parts (e.g. spark plugs, spark plug wires, alternator, starter, fuel pump, belts/hoses, etc.)
	Scheduled Maintenance per Owner's Manual
	Steering & Suspension (e.g. Shock absorbers, springs, struts, shocks, steering parts, etc.)
	Temperature Control (e.g. compressor, condenser, thermostat, recharge, radiator replacement, etc.)
	Tire & Wheel Service or Repair (e.g. tire alignment, tires rotated, bearing replacements, wheel balancing, etc.)
	Transmission & Clutch (rebuilt/replaced, transmission fluid flush, clutch adjusted, other transmission/clutch parts, etc)
Windshield, Glass, Mirrors & Lighting (Windshield repair/replace, side mirrors, other lighting parts)	

FOR MORE INFORMATION

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