

DEALER PROFILE



What is the quintessential North American tire dealer?

Presenting TIRE REVIEW's 2004 Tire Dealer Profile Study – the industry's most extensive, most coveted research effort. To compile this year's report, TIRE REVIEW surveyed hundreds of independent tire dealers throughout North America who took time out of their busy schedules to answer this important question.

Those hundreds of dealers banded together as a single voice to help us understand what it means to be successful in the tire industry.

One by one, these dealers offered valuable insights into the industry's most pressing questions. They answered fundamental questions, such as: How is a successful tire dealership structured? Where do they buy their tires? When do they sell the most tires? What are the average selling prices of consumer and commercial tires?

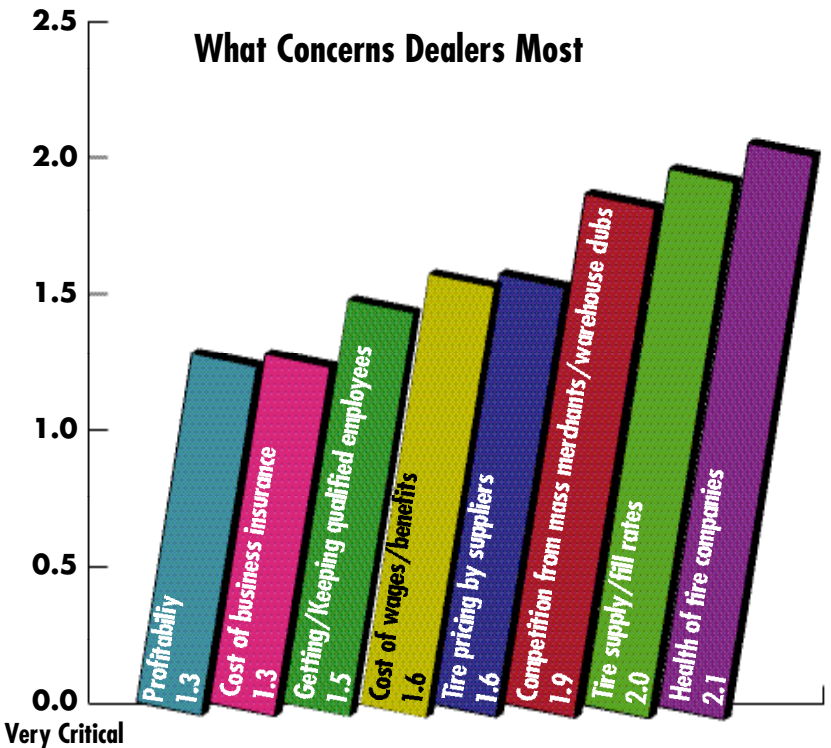
They also offered inside information that's not available anywhere else: How much profit do they earn on those tires? Who do dealers consider their toughest competition? Where are their pain points?

Presented here are a few of the key questions asked in this year's study. For complete study results, contact Bob Roberts, Babcox Research, at 330-670-1234, ext. 252, or by e-mail at broberts@babcox.com.

Sizing Up the Average Dealer

- 86%** Are family-owned
- 72%** Attended or graduated college
- 75%** Are sole owner
- 51%** Are not members of affinity/marketing groups
- 83%** Get management information from tire trade magazines
- 45%** Posted location sales of \$1 million or more

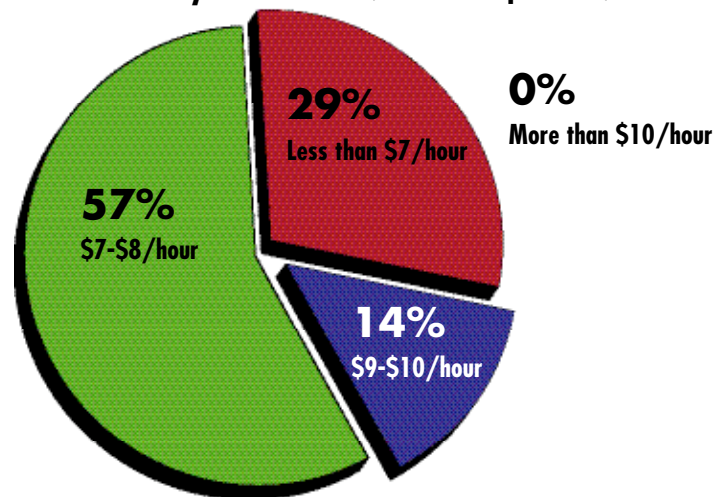
Not Very Critical



Sizing Up the Average Dealer

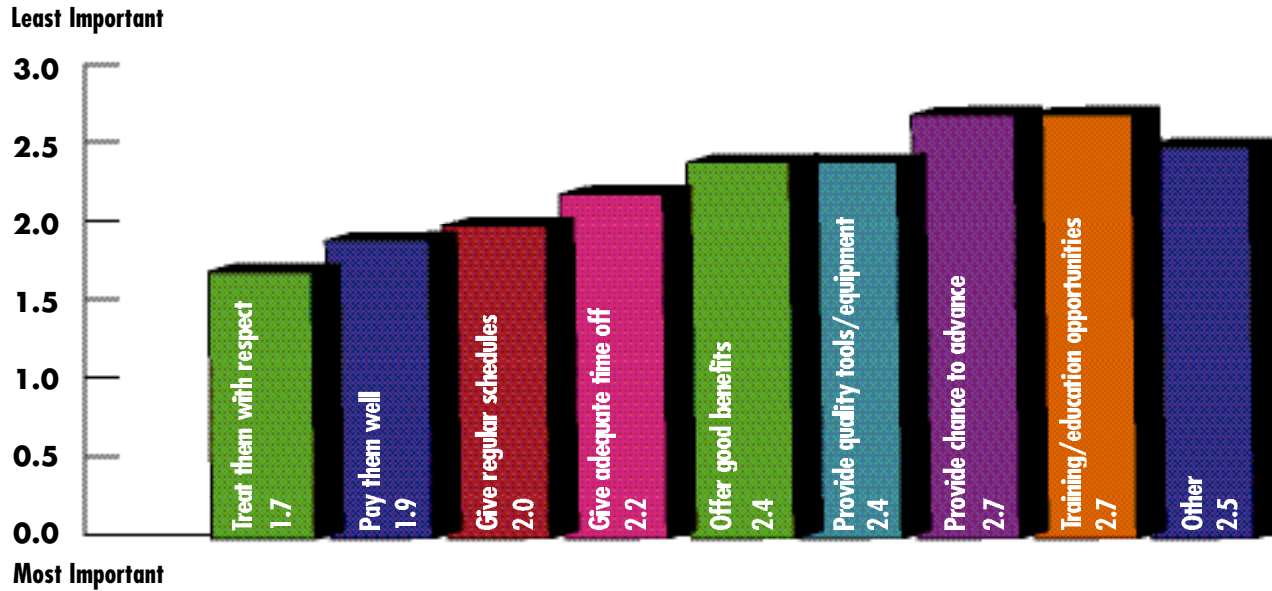
- 68%** Concerned about finding employees
- 80%** Sell used tires
- 3.0** Service techs employed
- 4.5** Service bays
- 6.2** Full-time employees
- 75%** Have a computer system
- 43%** Have a Web site
- 1%** Offer nitrogen inflation

What Dealers Pay New Hires (Without Experience)

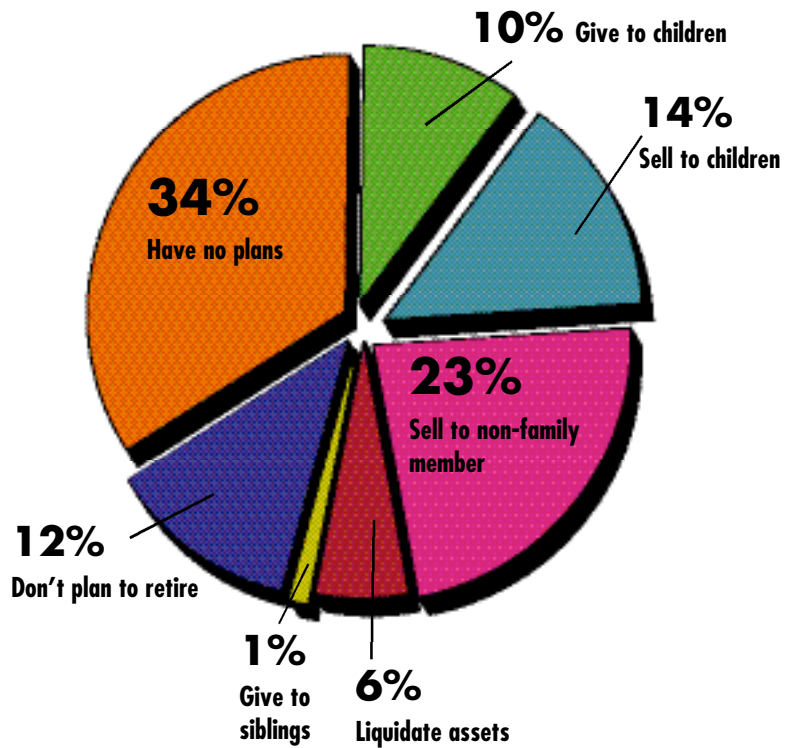




Employee Retention: What Dealers Think Works



What Dealers Will Do With Their Business at Retirement

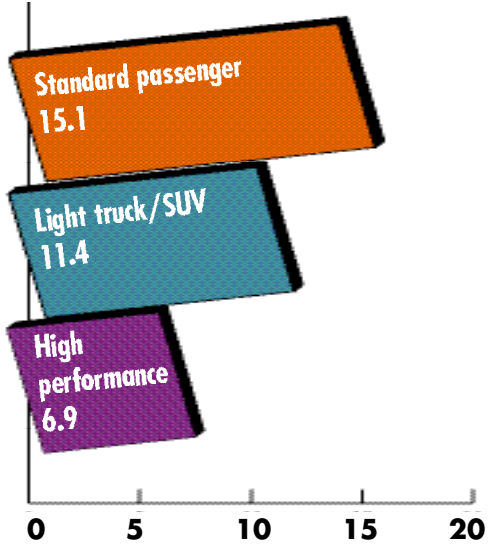


How Dealers Use Their Computers

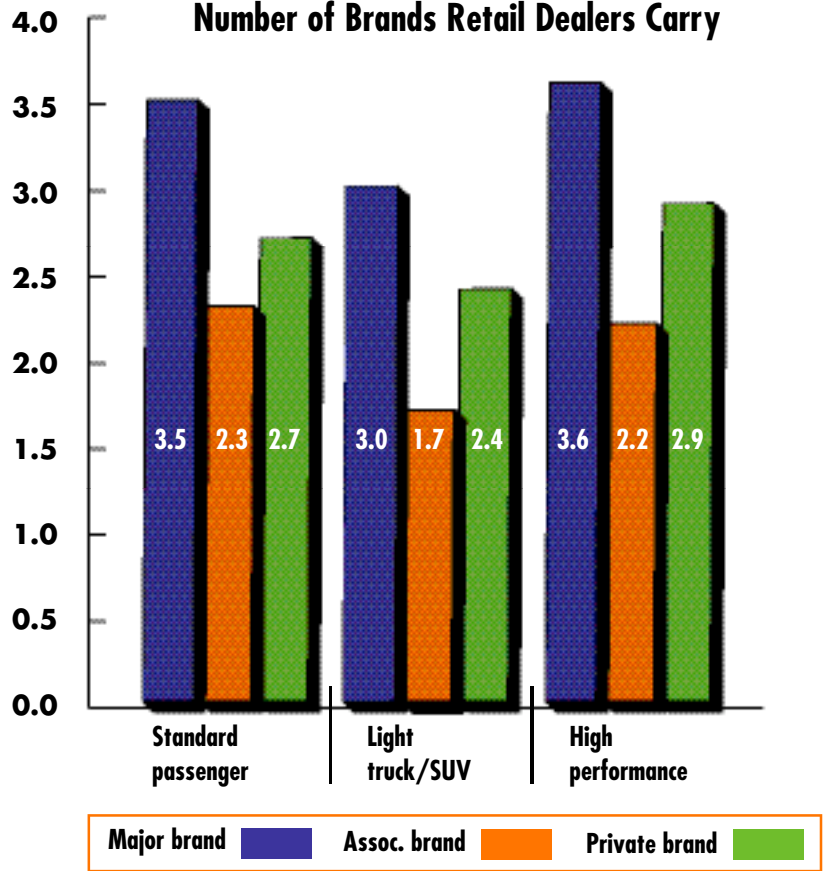
- 90%** Do business accounting
- 70%** Maintain customer database
- 41%** Track profitability of tire SKUs
- 73%** Handle inventory control
- 51%** Track vehicle histories
- 6%** Accept online customer orders



**What Retail Dealers Sell Each Day
(Average Tires Sold Per Day)**



Number of Brands Retail Dealers Carry

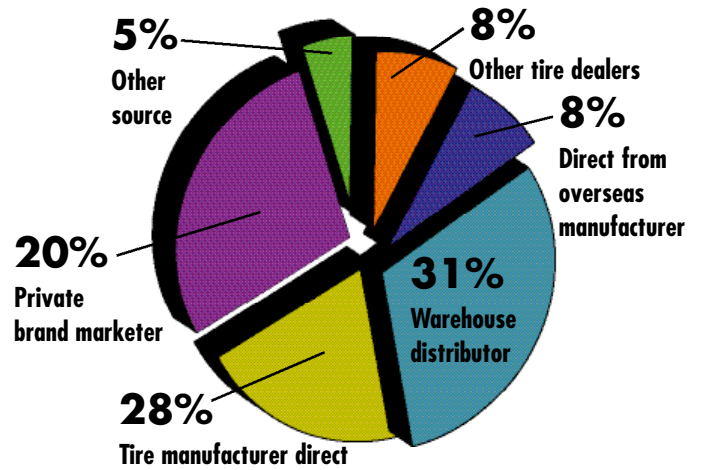


Why Retail Dealers Carry Certain Brands (Desired Supplier Attributes)





Where Dealers Get Their Consumer Tires



What Dealers Think is Important to Retail Tire Buyers

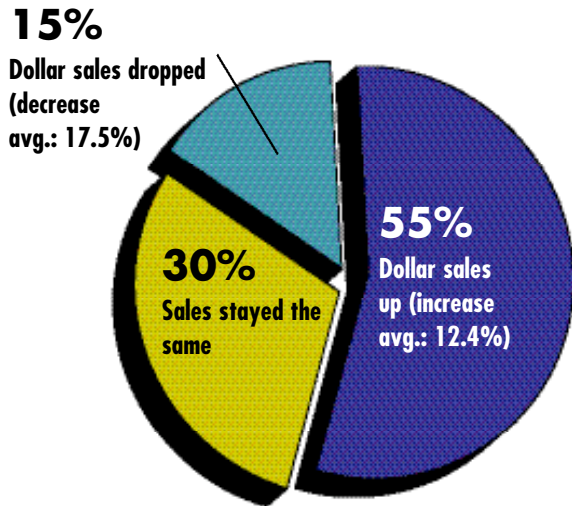


Why Customers Buy Particular HP Tires

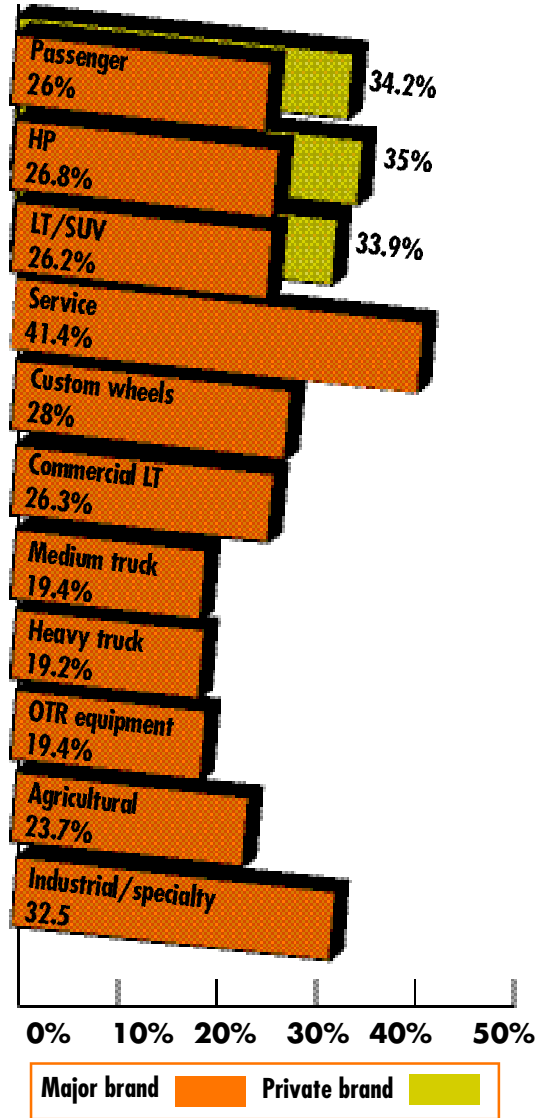




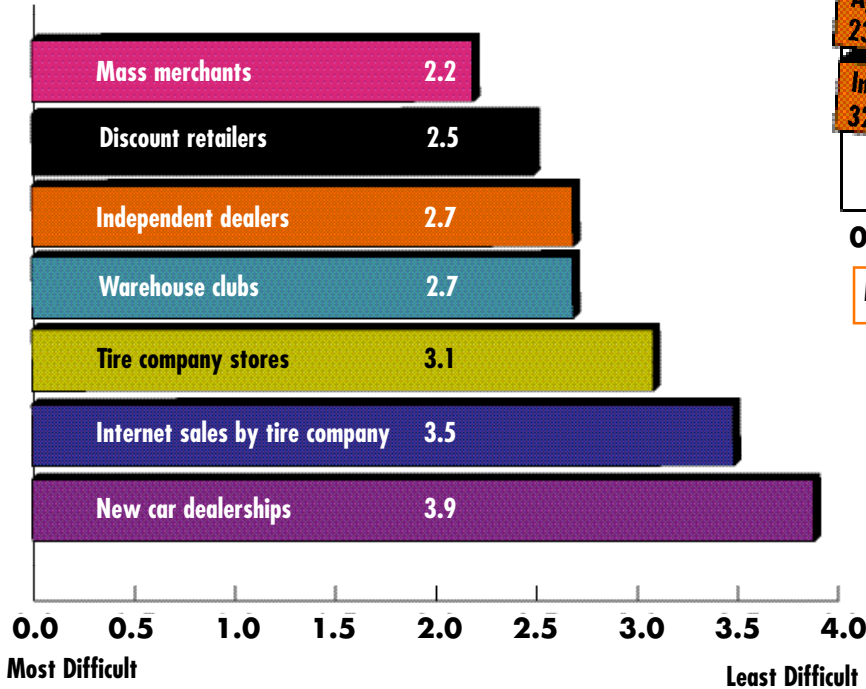
Dealer Sales Volume: Consumer Tires (2003 Sales vs. 2002 Sales)



Average Gross Profits: 2003 Sales

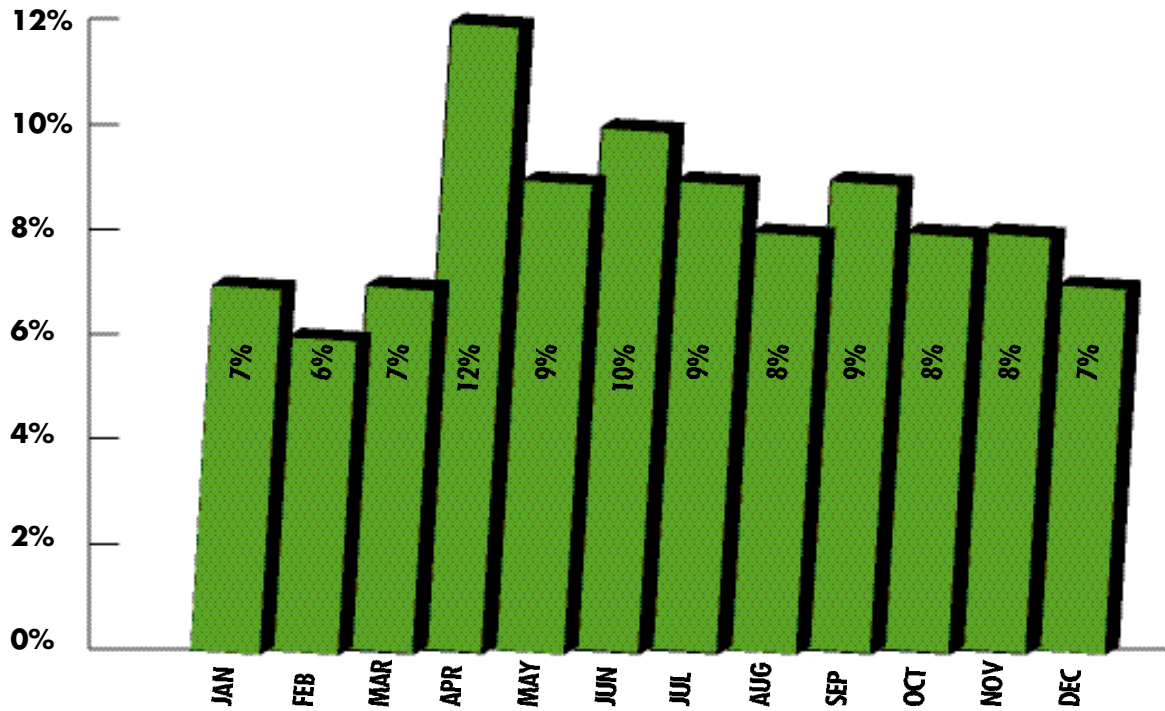


A Dealer's Most Difficult Competition





Consumer Tire Sales by Month: 2003



Customer Satisfaction Comes Standard



BOSCH
Constantly Driving Innovation

Circle 52 for Reader Service



Your Three Steps to Success

1. Choose the Program that Works for your Business
2. One-On-One Support to Create and implement Your Program
3. Updated Quarterly Marketing Materials and Programs

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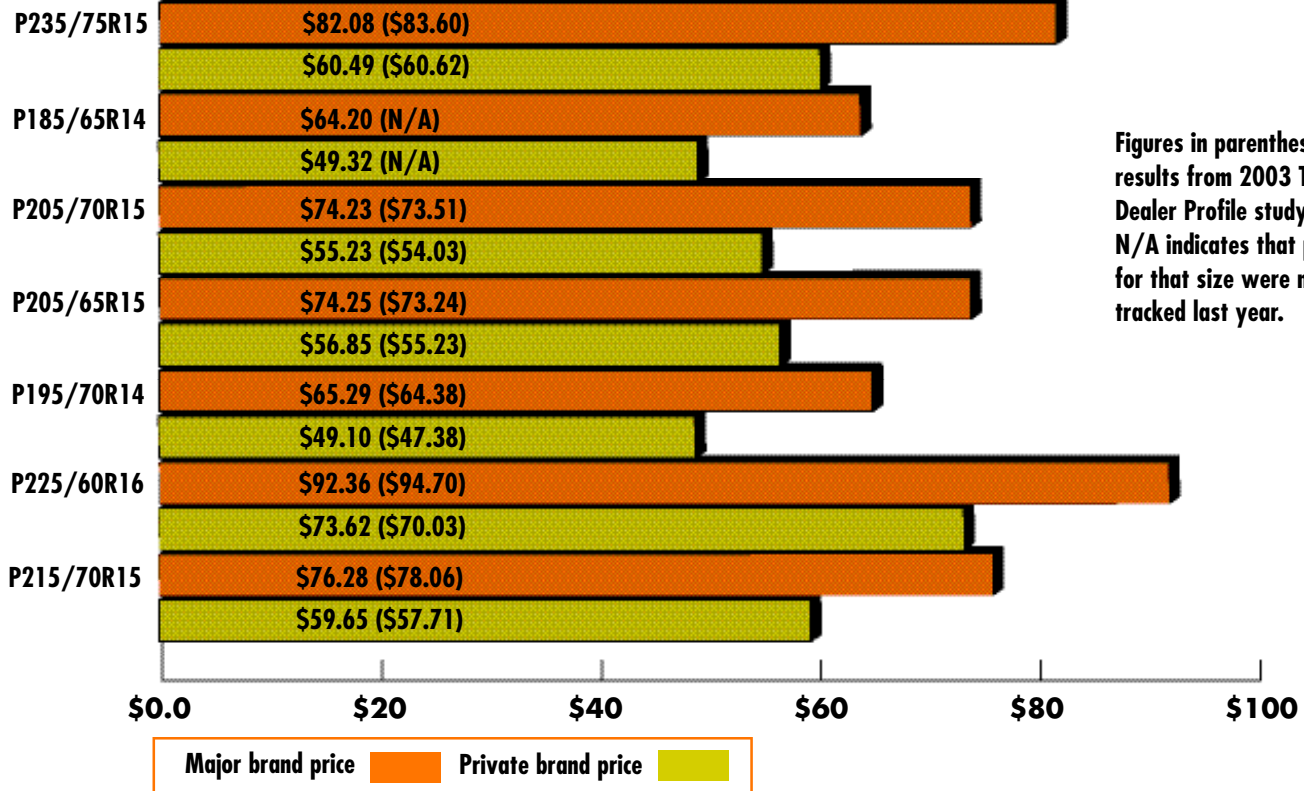
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Average Retail Price: Replacement Passenger Tires (Most Popular Sizes)



Figures in parenthesis are results from 2003 Tire Dealer Profile study. N/A indicates that prices for that size were not tracked last year.

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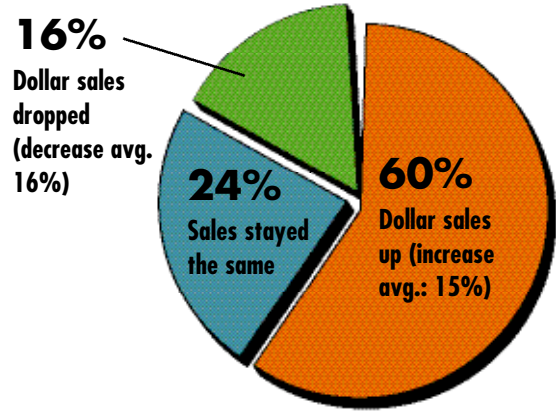
EVERYBODY WINS! Now available during our Hot Summer Sale, Bee Line is offering you **0% Financing on all of our alignment equipment!** Don't miss out on this unbelievable opportunity to purchase your new Alignment and Frame Repair equipment. **Visit www.beeline-co.com today to learn more.**



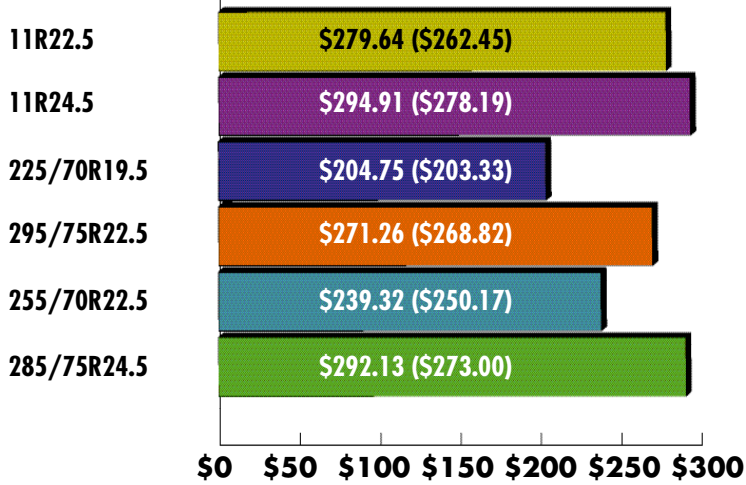
BEE LINE
HOT SUMMER SALE!



Dealer Sales Volume: Commercial Tires (2003 Sales vs. 2002 Sales)

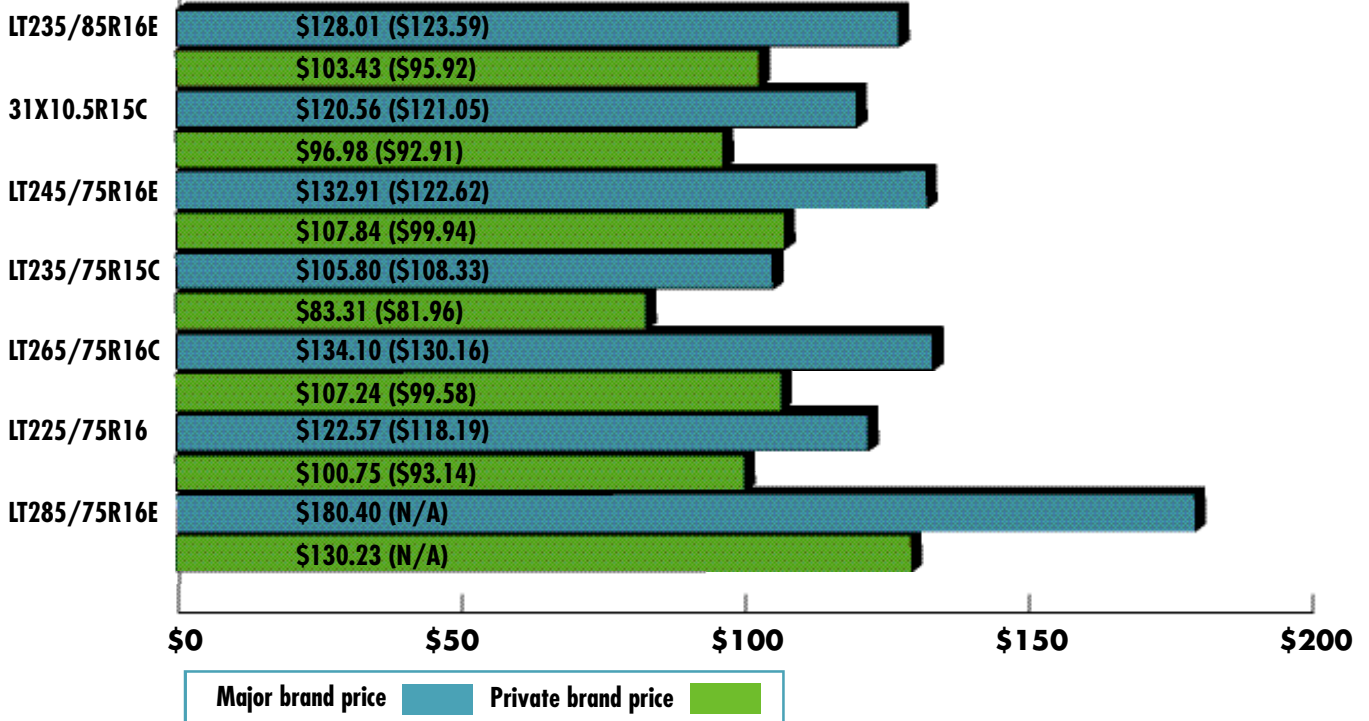


Average Selling Price: Replacement Medium Truck Tires (Most Popular Sizes)



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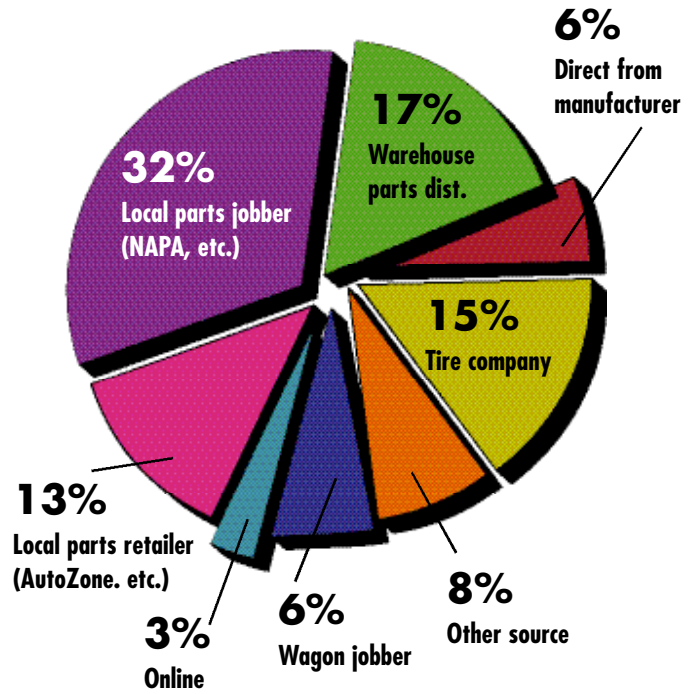
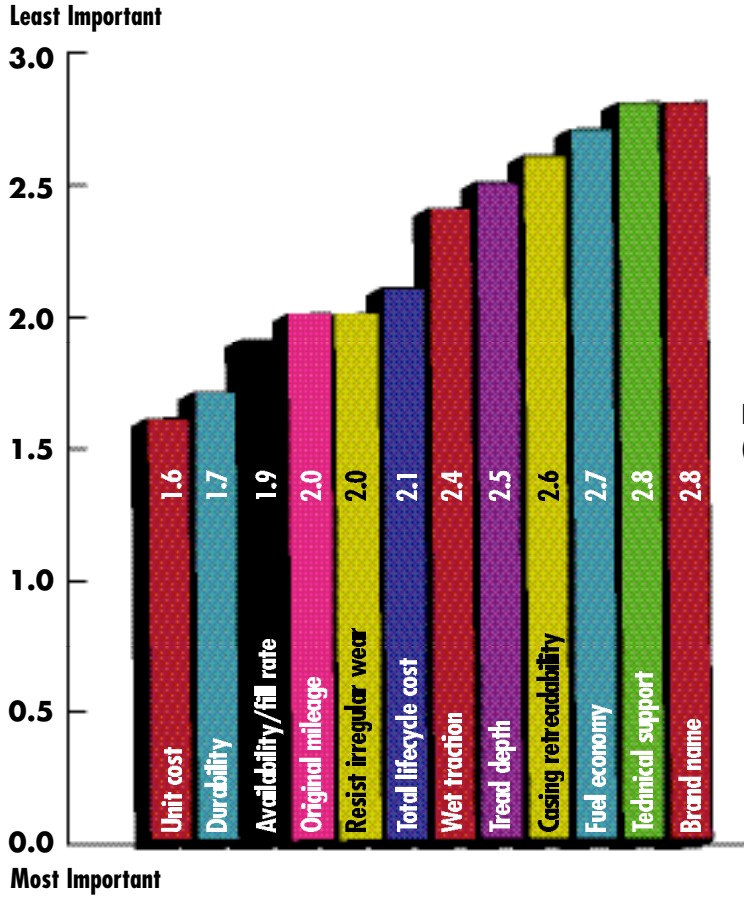
Average Retail Price: Replacement LT/SUV Tires (Most Popular Sizes)





Where Dealers Get Service Parts

What's Most Important to Truck Fleets (Desired Attributes)



Service Sales by Month - 2003

