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Introduction

5 Drivers of
Automotive Parts
Online Shoppers

⚡ Distinct

➔ Decisive

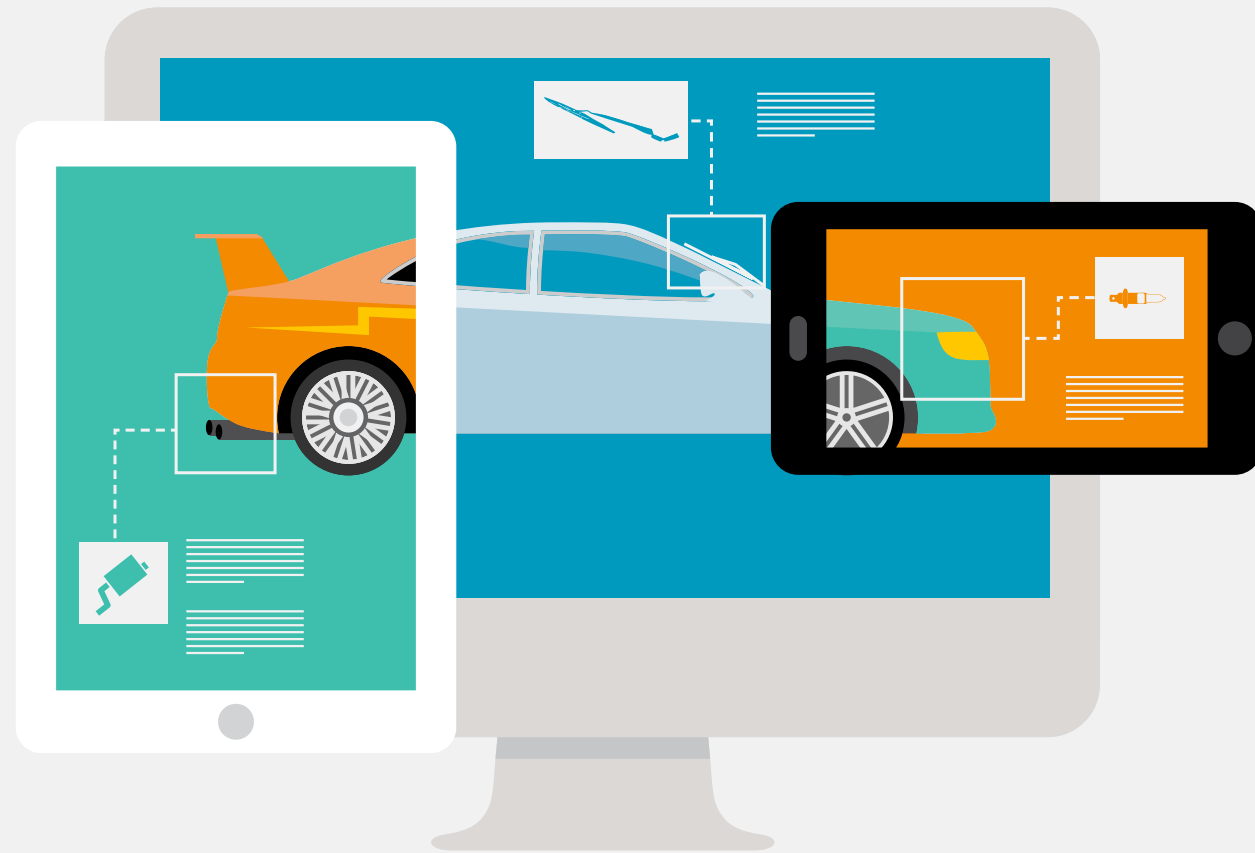
! Dedicated

🔍 Diligent

⊕ Diverse

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What's Driving the Automotive Parts Online Shopper™

A Customer Experience Study conducted by comScore

The second annual UPS® study delivers insights into the
online shopping habits and preferences of automotive
parts and accessories buyers






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Online shopping is poised to become one of the most important channels in the automotive parts aftermarket. Online channels are growing by double digits while brick and mortar channels are relatively flat.

With consumers maintaining their vehicles more than 10 years on average, the continued purchases of parts and accessories over the life of the vehicle is expected to drive continued online growth.

The rapid growth of the online channel within the automotive aftermarket brings new consumer shopping behaviors and preferences. To deliver what online automotive parts shoppers want, retailers must understand how and where these consumers research and purchase products, what delivery options they prefer and which factors drive their satisfaction with the customer experience.

The UPS What's Driving the Automotive Parts Online Shopper™ study provides, a roadmap to the five drivers that make these consumers distinct, decisive, dedicated, diligent and diverse.



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DISTINCT:
A difference based on purchasing intent for upgrade vs. replacement buyers



DECISIVE:
A group who knows what they want and are willing to wait for it



DEDICATED:
A frequent shopper desiring convenience and flexibility



DIVERSE:
A demographically varied market



DILIGENT:
A focus on research emphasizing price and reviews

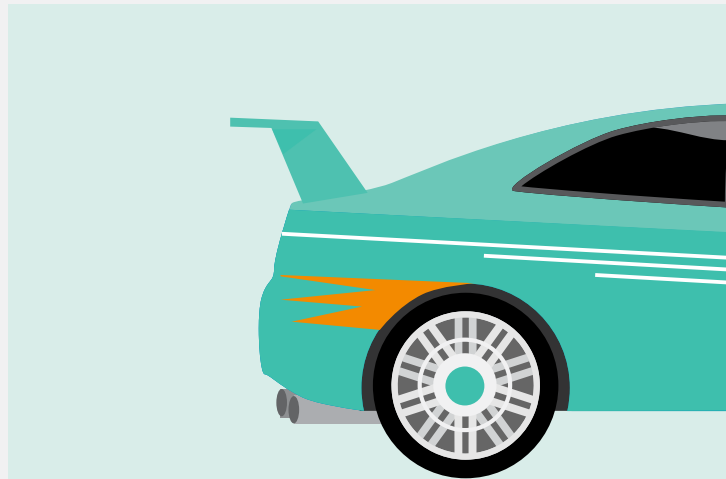


A Roadmap to the **5 Drivers** of Automotive Parts Online Shoppers



Distinct: A difference based on purchasing intent

Online automotive shoppers can be broken into two groups: upgrade buyers, who are looking to enhance the performance or aesthetics of their vehicle, and replacement buyers, who are seeking products for repair maintenance. Each has unique purchasing preferences and behaviors that are important for online retailers and manufacturers to understand.



UPGRADE BUYERS

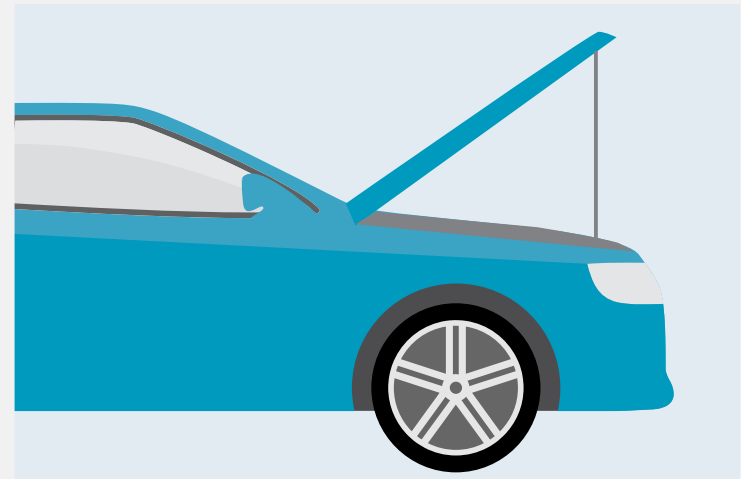
AGE: More likely to be millennials between 18 and 34

ONLINE SHOPPING EXPERIENCE: Tech savvy, mobile device shoppers who are also more likely to be power shoppers, individuals who make more than 9 online purchases based on a typical 3-month period

COMPARISON SHOPPING: Research products on social media sites

RETURNS: More likely to return items than overall automotive parts shoppers

DIY: Roughly 1/2 install upgrade parts themselves



REPLACEMENT BUYERS

AGE: Typically over 45

ONLINE SHOPPING EXPERIENCE: Highly focused and direct approach as they typically know what they are looking for

COMPARISON SHOPPING: Will shop with competitors if what they are looking for is unavailable or not competitively priced

RETURNS: Less likely to return online purchases than overall automotive parts shoppers

DIY: Almost 2/3 install replacement parts themselves

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Distinct: A difference based on purchasing intent

Upgrade and replacement buyers often vary when it comes to their purchasing intent. Not only are they different in their purchasing methods and returns preferences, but they are also distinct in their usage of mobile apps and their inclination toward online global purchasing.

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Upgrade Buyers **UB**

Replacement Buyers **RB**

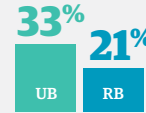
ONLINE PURCHASE METHOD:



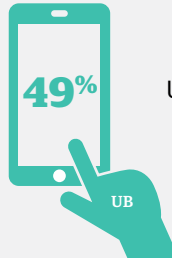
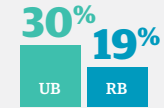
desktop/laptop



tablet/e-reader



mobile phone

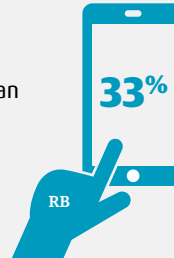


49%

UB

MOBILE APPS:

Upgrade buyers are more likely than replacement buyers to shop on a manufacturer's mobile app



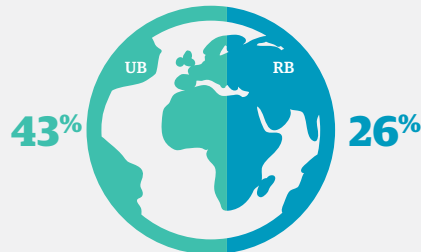
33%

RB



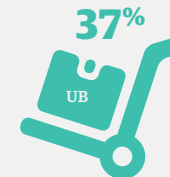
DIY:

Replacement buyers are more likely to install replacement parts themselves



GLOBAL PURCHASING:

Upgrade buyers are more open than replacement buyers to purchasing from international retailers

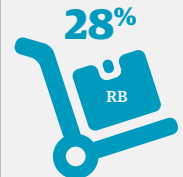


37%

UB

RETURNS:

Replacement buyers are less likely to return or exchange online orders compared to upgrade buyers



28%

RB



→ Decisive: A group who knows what they want and are willing to wait for it

Automotive online shoppers rarely return items, compared to the general online shopper, but when they do, they prefer to return items in store. Separately, the percentage of millennials who purchase additional items in store when picking up their online order is the highest among all other age groups.

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ONLINE RETURN COMPARISON



***62%**

Percentage of **general online shoppers** who returned an item in 2014



27%

Percentage of **automotive online shoppers** who returned an item in 2014

*2014 UPS Pulse of the Online Shopper Study™

AUTOMOTIVE SHOPPERS PREFERRED PLACE OF RETURN



Percentage of **automotive online shoppers** who prefer to return to store

76%



24%

Percentage of **automotive online shoppers** who prefer to ship back to retailer/manufacturer

GAUGING MILLENNIALS

59% of millennials choose ship to store for pickup. Of this percentage, **9 in 10** will purchase additional items in store



→ Decisive: A group who knows what they want and are willing to wait for it

Online automotive shoppers go into the purchasing process with a solid understanding of their specific product needs. Millennials are also very decisive when it comes to their shipping preferences choosing to pay extra for faster delivery and a specified delivery window.

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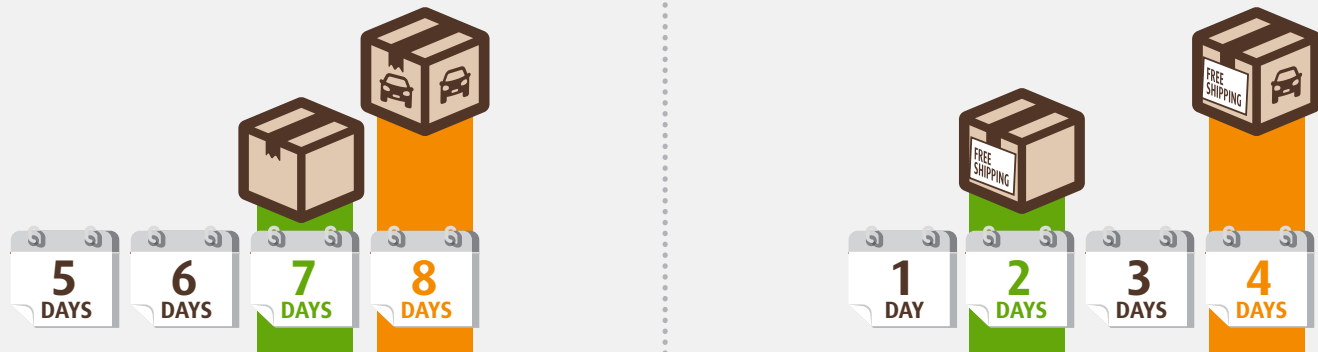
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DAYS WILLING TO WAIT FOR ONLINE ORDER



Automotive online shoppers are willing to wait an average of **8 days to receive their online order** compared to 7 days for an average online shopper

Automotive online shoppers are willing to wait an **additional 4 days in exchange for free shipping** to receive their online order compared to 2 days for an average online shopper

← GAUGING MILLENNIALS →

Millennials are willing to pay for faster delivery and to have a specified delivery window in an effort to better plan their day.



Dedicated: A frequent shopper desiring convenience and flexibility

Automotive parts online shoppers, tend to be frequent purchasers who expect convenience and flexibility across the path to purchase, including returns.

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AUTOMOTIVE ONLINE SHOPPER FREQUENCY OF PURCHASE



35%

Power Shopper
(9-50 online purchases*)



24%

Moderate Shopper
(5-8 online purchases*)



41%

Light Shopper
(2-4 online purchases*)

*Based on a typical three months of the year

SATISFACTION WITH ASPECTS OF THE SEARCH/BROWSING EXPERIENCE ONLINE

75%

The variety of products/
brands offered

69%

The ability to find
a customer service
phone number or
other contact option

73%

The ease with
which I'm able to
find, search, and
sort/filter products



71%

The amount of product
detail to determine what
would best meet my needs

73%

The ability to find the item
I'm looking for quickly
through a search engine

GAUGING MILLENNIALS

57% of millennials prefer to make purchases online vs. **43%** who prefer to make purchases in a physical store



Diligent: A focus on research emphasizing price

Reviews and ratings are considered most helpful when automotive shoppers are deciding to make an online purchase. Social media also plays a role in purchasing decisions among parts and accessories buyers. Like the general online shopper, automotive parts and accessories purchasers are most influenced by reviews or posts they read on retail sites.

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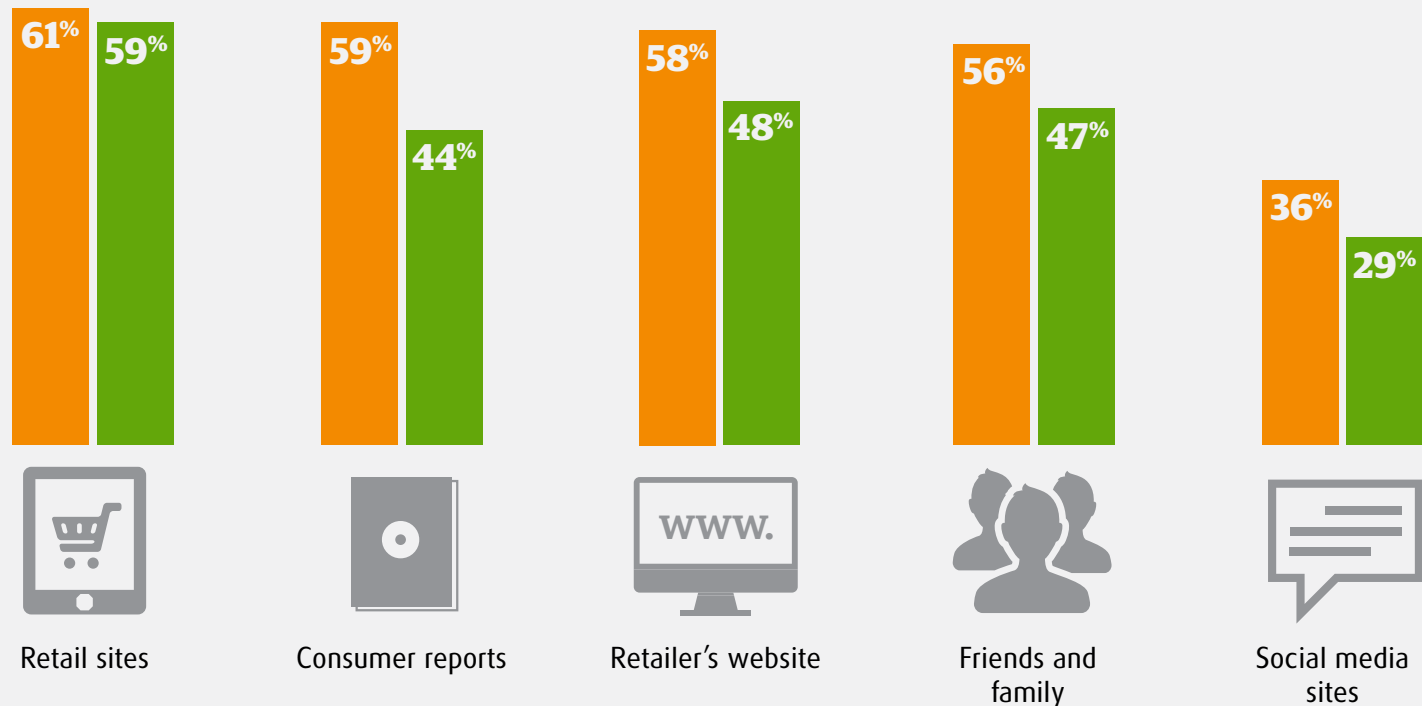
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REVIEWS OR POSTS INFLUENCING PURCHASE DECISIONS

Automotive online shopper General online shopper





Diligent: A focus on research emphasizing price

Online automotive shoppers conduct thorough research, paying particular attention to price and reviews from trusted sources. To ensure they are getting the best value at the lowest price, they comparison shop both online and in store.

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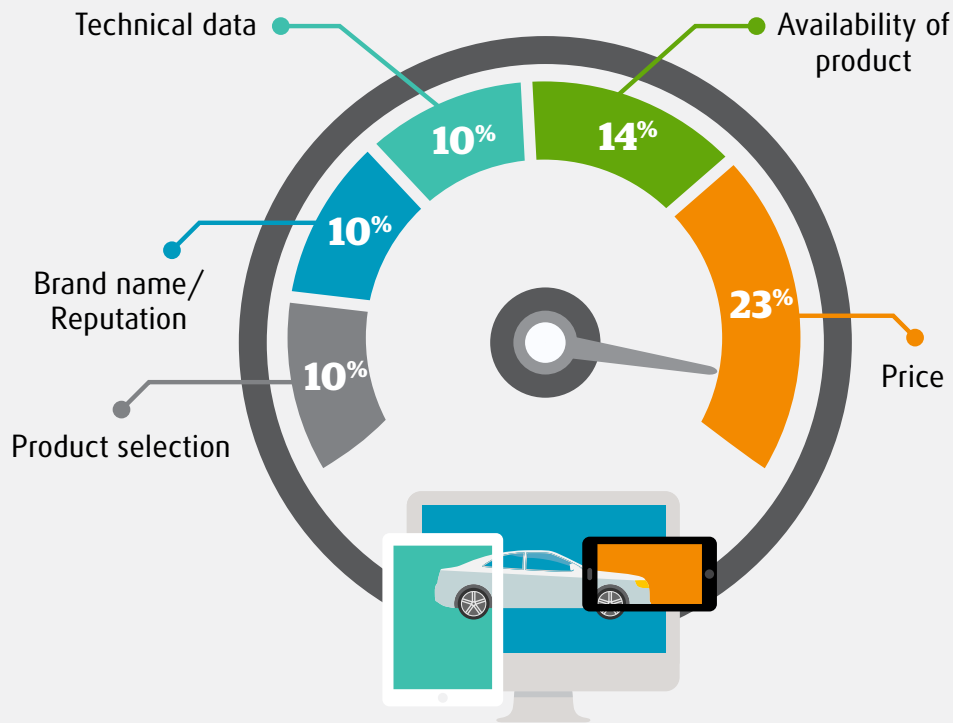
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TOP 5 CONSIDERATIONS WHEN COMPARISON SHOPPING



83% of automotive parts and accessories purchasers compare prices before making a purchase



ONLINE **92%**



IN STORE **70%**

Places automotive parts and accessories shoppers compare prices before making a purchase



Diverse: A demographically varied market

Online automotive shoppers are a diverse group when it comes to age and gender. Women make up a significant portion of the market along with millennials, who are major players and whose influence will continue to increase as older generations age out of the automotive market.

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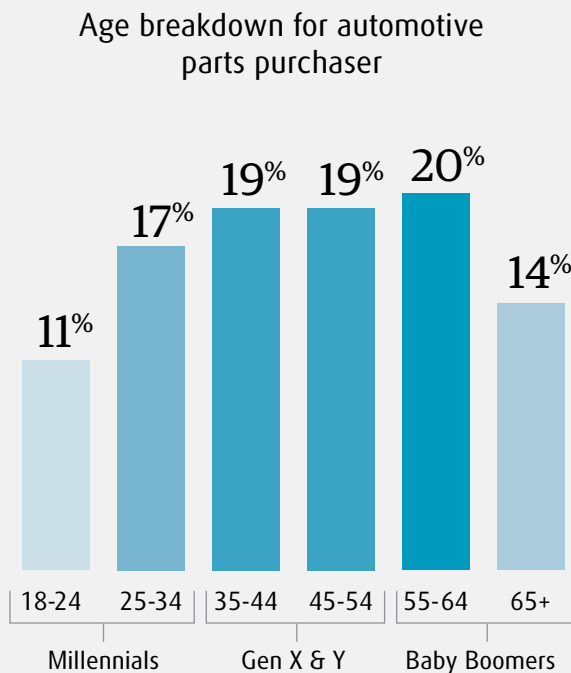
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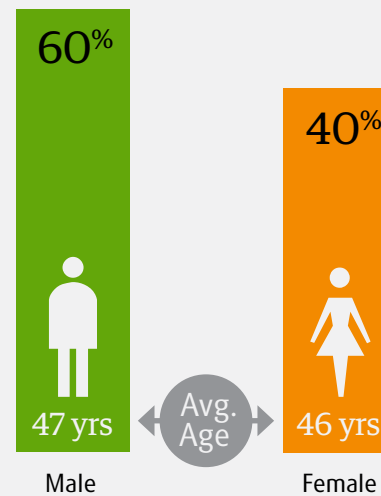
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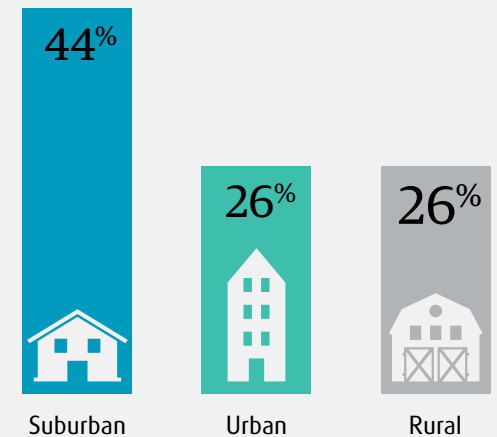
BREAKDOWN OF AUTOMOTIVE PARTS & ACCESSORIES PURCHASERS



Typical gender of an automotive parts purchaser



Where automotive parts and accessories shoppers live



GAUGING MILLENNIALS

28% of automotive parts & accessories purchasers are millennials (18-34 years old)




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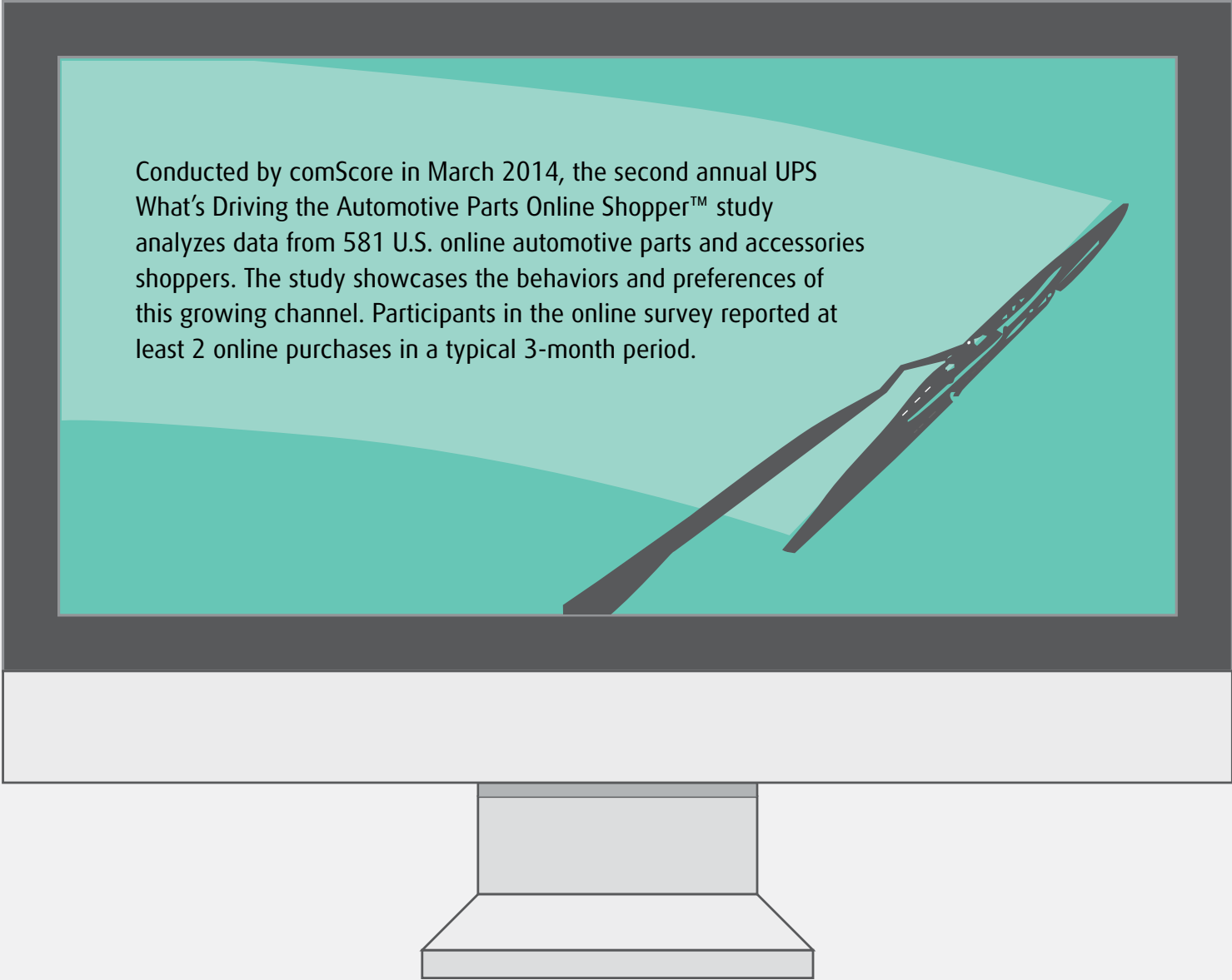
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Conducted by comScore in March 2014, the second annual UPS What's Driving the Automotive Parts Online Shopper™ study analyzes data from 581 U.S. online automotive parts and accessories shoppers. The study showcases the behaviors and preferences of this growing channel. Participants in the online survey reported at least 2 online purchases in a typical 3-month period.