



2015 What's Driving the Automotive
Parts Online Shopper™ Study

WHITE PAPER



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Rev Up Your Online Experience to Fuel Shopper Satisfaction





INTRODUCTION

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Today's automotive parts and accessories online shoppers are driven by a desire to find value. They know what they want and are more empowered than ever before in the pre-purchase, purchase and post-purchase phases of the shopping experience. For retailers, knowing what "drives" these consumers and how to deliver on their evolving expectations is essential to increasing sales, customer service and loyalty.

The third annual UPS What's Driving the Automotive Parts Online Shopper™ study reveals what factors influence online shoppers' preferences and behaviors, and how automotive parts retailers can fuel customer satisfaction.



This paper is divided into four sections. The first three sections - Drivers, Accelerators and Shifters - explore factors impacting the automotive parts and accessories online shopper. The fourth section - Shopper Profiles - highlights interesting differences in preferences and behaviors by various shopper groups, including men vs. women, millennials vs. older age groups, and replacement buyers vs. upgrade buyers.



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Factors that consistently make consumers take action



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New influences on purchasing decisions



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Changing dynamics from 2014 to 2015



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Differences between shopper groups



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Factors that consistently make
consumers take action



Drivers: Cost

Cost plays one of the most important roles in purchase decisions for consumers buying automotive parts and accessories online. Both product price and shipping costs are factors in whether a consumer will ultimately make a purchase. Free shipping is important; however, consumers are often willing to pay for shipping to get the right product.





Drivers: Selection

Consumers know what they want when shopping for automotive parts and accessories online. From comparison shopping to purchasing from international retailers, online shoppers will search until they find the right item. Product quality and selection play big roles in purchase decisions.

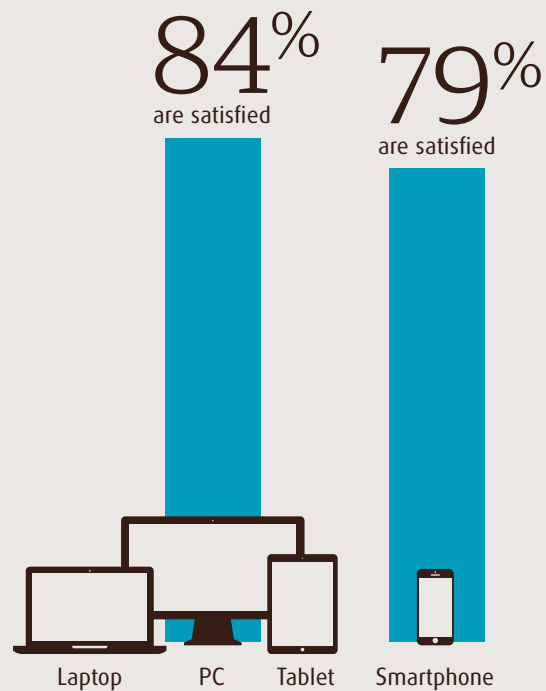




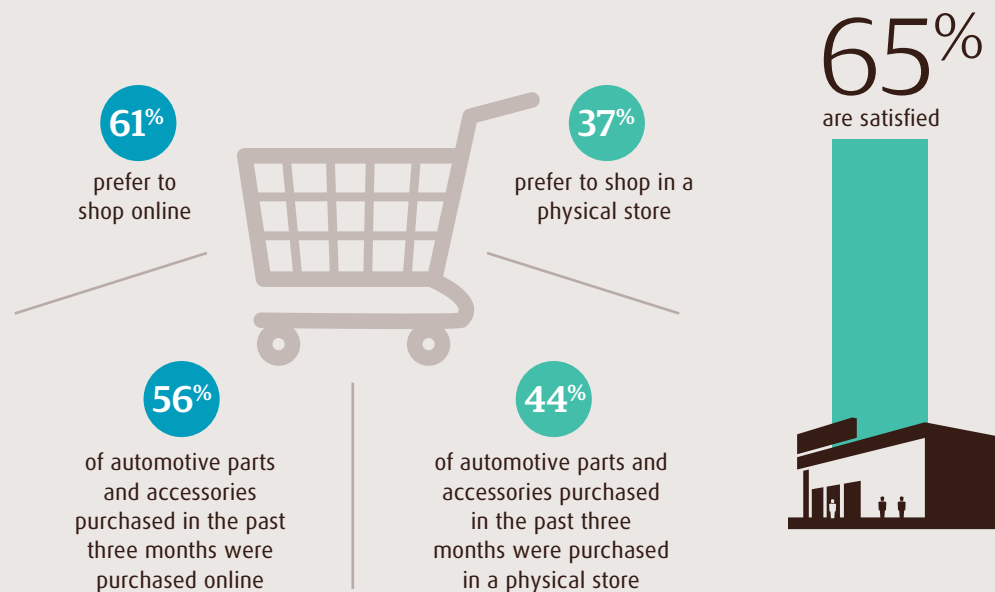
Drivers: Online Presence

Online automotive parts and accessories purchasers prefer to shop online and are more satisfied with the online shopping experience versus the in-store shopping experience. While the store plays an important role in the total shopping experience, more online shoppers make purchases online than in-store.

Online shoppers are more satisfied with shopping on a desktop/laptop, tablet, and smartphone



Online shoppers are less satisfied with shopping in a physical store





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New influences on purchasing
decisions



Accelerators: Reviews and Offers

Consumers place great emphasis on access to information and special offers when purchasing automotive parts and accessories online. From peer ratings to coupons and discounts, product reviews and incentives influence purchasing decisions.



58%

find ratings and reviews helpful



71%

consider product reviews an influential piece of content on a retailer's website – more than any other feature



63%

use online coupons



52%

are more likely to shop with a retailer if they receive email offers with discounts





Accelerators: Social and Mobile

The rise of mobile commerce and popularity of social media influence online automotive parts and accessories shoppers. Among these consumers, usage of mobile phones and apps as researching tools when shopping both in-store and online is growing. These shoppers are also heavy users of social media, which is increasingly influencing purchase decisions.

63%

use social networking sites, with Facebook being the most popular channel



26%

say social media influences their purchase decisions



31%

use a retailer's app to get up-to-date information including sales, special offers and coupons



43%

frequently use their mobile phones to compare prices and look up product reviews



41%

frequently use their mobile phones to read product details





ACCELERATORS

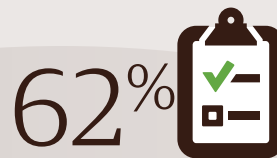
Accelerators: Convenience and Technology

Automotive parts and accessories online shoppers value convenience and technology. These consumers are interested in delivery service options that provide greater access and visibility into when and where their items will be delivered. When shopping in store, they are increasingly interested in new technologies that make their shopping experience seamless, such as electronic receipts and in-store kiosks.



63%

would like to receive email or text delivery alerts with the approximate time of delivery



62%

would like to authorize delivery beforehand without having to be home to sign for a package



63%

find it appealing to leave instructions for a carrier when not at home to receive a package



45%

like electronic receipts sent via email or text



41%

like in-store kiosks that allow them to order products that are out of stock or not sold in stores





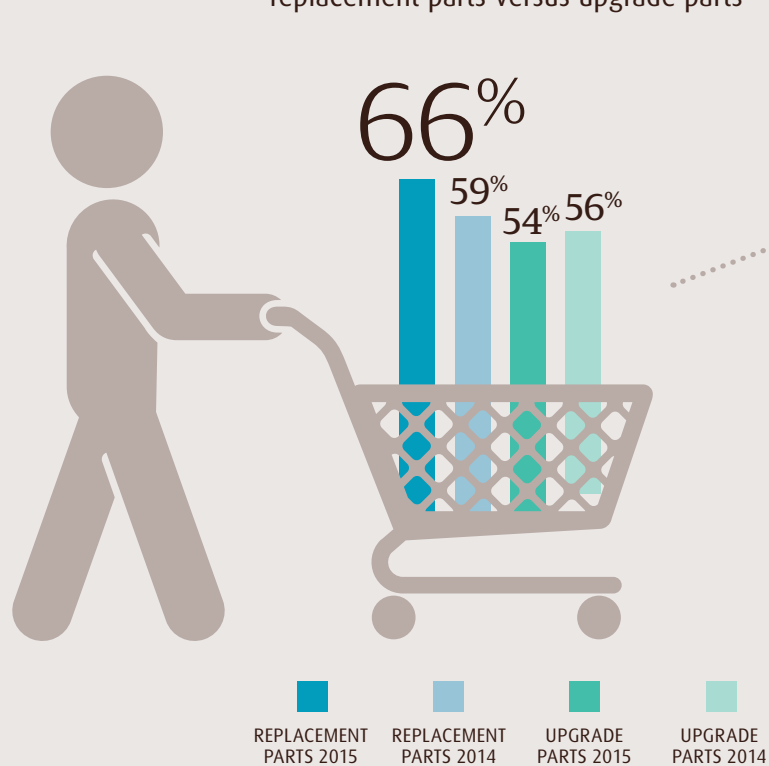
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Changing dynamics from
2014 to 2015

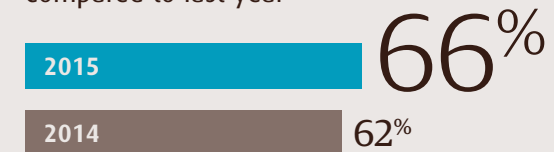
Shifters: Autonomy

Compared to last year, online shoppers are becoming more self-reliant when it comes to replacement parts. Rather than hiring a professional, they are installing parts themselves. The fact that more consumers are buying replacement parts may also be related to a growing do-it-yourself mentality.

Online shoppers are purchasing more replacement parts versus upgrade parts



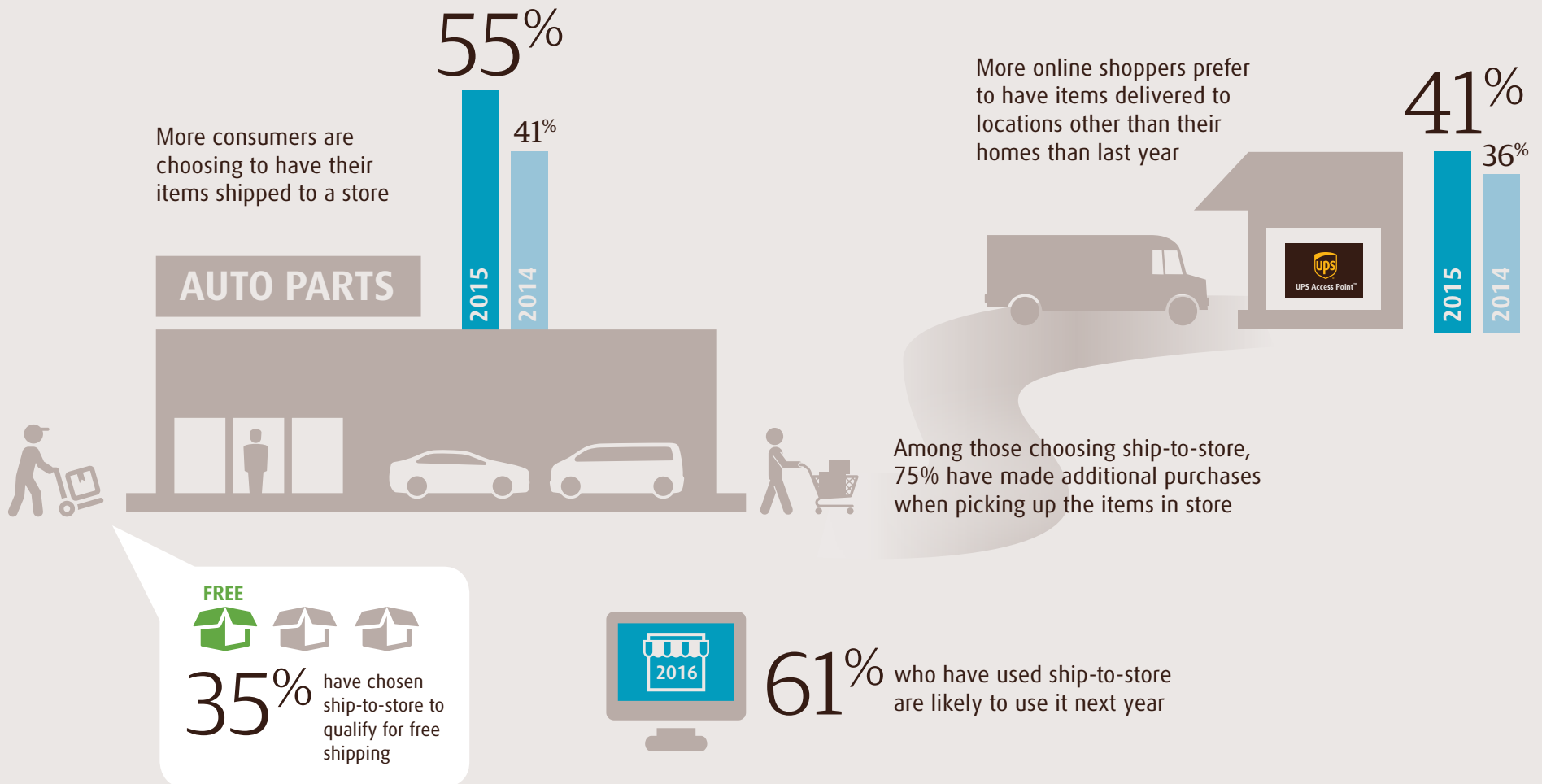
More online shoppers have installed parts themselves compared to last year



Online shoppers report that only 34% of automotive parts and accessories are installed for them

Shifters: Shipping Preferences

Shipping preferences for automotive parts and accessories are evolving. From the rise of ship-to-store to a growing interest in alternate delivery options, consumers are increasingly open to having their packages delivered to locations other than their homes.

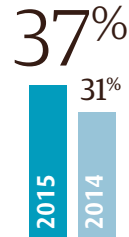


Shifters: Physical Store

Despite the continued growth of e-commerce, the physical store plays a major role in the shopping experience for online automotive parts and accessories purchasers - more so than last year. The store heavily influences both purchase and post-purchase experiences, especially returns.

AUTO PARTS

Some shoppers still prefer to purchase automotive parts and accessories in a physical store



More consumers strongly prefer to return items to a store, and 72% have done so



93% of these shoppers have made additional purchases while in the store



57% find the ability to return an item to a physical store the top factor of a best returns experience



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Differences between
shopper groups



The survey revealed some interesting differences between shopper groups.

Men vs. Women

Men are more patient than women when it comes to receiving their online orders, willing to wait almost twice as long for their deliveries. A large number of men want packages delivered to locations other than their homes, whereas the majority of women prefer to have packages delivered to their homes. Women are significantly heavier users of social media versus men and value free shipping options more than men. When it comes to selecting retailers, women are heavily influenced by price, whereas men are most concerned with fitment data. On average, men are installing more parts themselves than women.

Millennials vs. Older Age Groups

Defined as individuals ages 18-34, millennials are far more likely to use mobile devices and social media versus older age groups. They tend to select faster shipping options, however, they are willing to wait twice as long for deliveries versus older age groups. Millennials also want packages delivered to locations other than their homes, whereas older age groups prefer to have packages delivered to their homes. Older age groups are much more concerned with price when selecting retailers versus millennials. Both groups of shoppers highly value free shipping options.


Replacement Buyers vs. Upgrade Buyers

Replacement buyers are much more concerned with price when selecting retailers whereas upgrade buyers focus on brand reputation. Upgrade buyers are willing to wait longer for deliveries of their online orders versus replacement buyers, who want deliveries faster. When it comes to delivery locations, replacement buyers want packages delivered to their homes whereas a large percentage of upgrade buyers prefer deliveries to locations other than their homes. Despite these preferences, replacement buyers would choose ship-to-store more often than upgrade buyers in order to qualify for free shipping – likely because price is more important to replacement buyers.



Shopper Profiles: Men vs. Women

MEN

47%  Fitment data

26%  Technical support


WHAT THEY LOOK FOR IN A RETAILER

46%  Conduct delivery tracking via mobile device

43%  Locate stores and research products via mobile device

54%  of men use social media

MOBILE AND SOCIAL USAGE


56%  say free shipping options are important

FREE SHIPPING


11 DAYS  Paid shipping

10 DAYS  Free shipping

DAYS WILLING TO WAIT FOR DELIVERIES

46%  prefer to have packages delivered to locations other than their homes

DELIVERY PREFERENCES

70%  of automotive parts and accessories purchased were self-installed

DIY

WOMEN


62%  Price

32%  Customer service and shipping options (tied)

76%  of women use social media

23%  Locate stores and research products via mobile device


22%  Conduct delivery tracking via mobile device

76%  say free shipping options are important


5 DAYS  Paid shipping

6 DAYS  Free shipping



67%  want packages delivered to their homes



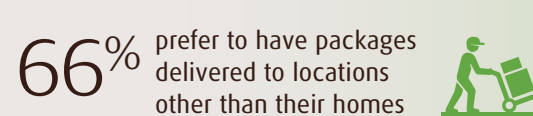
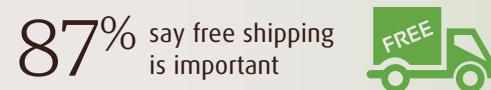
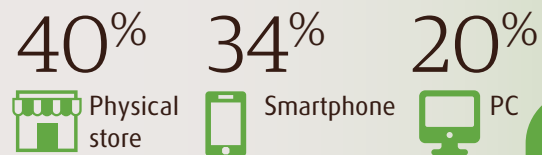
59%  of automotive parts and accessories purchased were self-installed



Shopper Profiles: Millennials vs. Older Age Groups



MILLENNIALS



WHAT THEY LOOK FOR IN A RETAILER

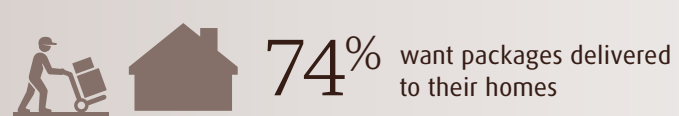
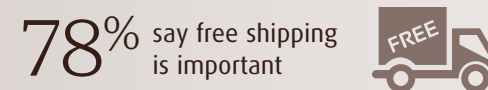
HOW THEY LIKE TO MAKE PURCHASES

SOCIAL MEDIA USAGE

FREE SHIPPING

DELIVERY PREFERENCES

OLDER AGE GROUPS





Shopper Profiles: Replacement vs. Upgrade Buyers

REPLACEMENT BUYERS

58%  Price

40%  Returns policy

WHAT THEY LOOK FOR IN A RETAILER

 52%
Online


 41%
Physical store

HOW THEY LIKE TO MAKE PURCHASES

69%  use social media

31%  say social media influences purchases


SOCIAL MEDIA USAGE

71% say free shipping options are important 

67% would choose ship-to-store to qualify for free or reduced shipping

FREE SHIPPING

 Paid shipping from U.S. retailers

 Paid shipping from international retailers

DAYS WILLING TO WAIT FOR DELIVERIES

63% want packages delivered to their homes




DELIVERY PREFERENCES

UPGRADE BUYERS

38%  Brand name/reputation

32%  Technical support


72%  Online

26%  Physical store




59%  use social media

24%  say social media influences purchases

62% say free shipping options are important 

49% would choose ship-to-store to qualify for free or reduced shipping

 Paid shipping from U.S. retailers

 Paid shipping from international retailers



45% prefer to have packages delivered to locations other than their homes

Conclusion

Automotive parts and accessories online shoppers are a distinctive group of consumers with specific preferences and purchasing behaviors. Here are five top takeaways for retailers looking to drive more business with these customers based on UPS's survey findings.



Empower the shopper: Provide convenient resources for consumers to get details on products and offer more choices such as alternate delivery options, in-store technology and electronic receipts.



Be omnichannel friendly: Deliver a consistent and seamless experience across all channels, understanding that consumers are increasingly mobile but still highly value the store.



Look for ways to add value: Offer specials, promotions and coupons to keep customers excited.



Don't overlook logistics: Remember that how, when and where consumers receive their products shapes their overall shopping experience and impacts your brand perception.



Know demographic preferences: Understand what drives men versus women, millennials versus older age groups and replacement buyers versus upgrade parts buyers to cater to these groups' needs and preferences.



METHODOLOGY

Conducted by comScore in March 2015, the third annual UPS What's Driving the Automotive Parts Online Shopper™ study analyzes data from 541 U.S. online automotive parts and accessories shoppers. Participants in the online survey reported at least 2 online purchases in a typical 3-month period.