



Automotive Aftermarket
Suppliers Association

Online Activity Is Growing In the Automotive Aftermarket

Special Report Special Report Special Report Special Report

Automotive Aftermarket Suppliers Association
By Experian Automotive
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The Automotive Aftermarket and the Internet: Growth and Opportunity Through Branding, Search And Social Networking

By Kamal Tahir, Senior Product Manager for Experian Automotive

There is no question that the Internet has radically changed the world. The technology is now ubiquitous, as nearly 80 percent of people in North America have regular Internet access. It has changed nearly every facet of our existence — from how we communicate, shop and learn to how we manage finances and more.

Certainly, the Internet has impacted how the automotive industry interacts with its customer base. Nearly 80 percent of all automotive sales start with some type of research online — from detailed searches for product and pricing information to simple searches for dealer location and phone number. Every manufacturer and seemingly every retailer have a Website and conduct more customer interaction online every day.

How has this Internet revolution impacted the automotive aftermarket? Are customers actively searching for replacement parts, and, if so, which companies are generating the most Internet traffic?

Experian Automotive and Experian® Hitwise® have combined to review Internet traffic patterns on 633 automotive aftermarket industry Websites from manufacturers, retailers, repair referral providers and AASA's Top 100 Aftermarket Supplier list.

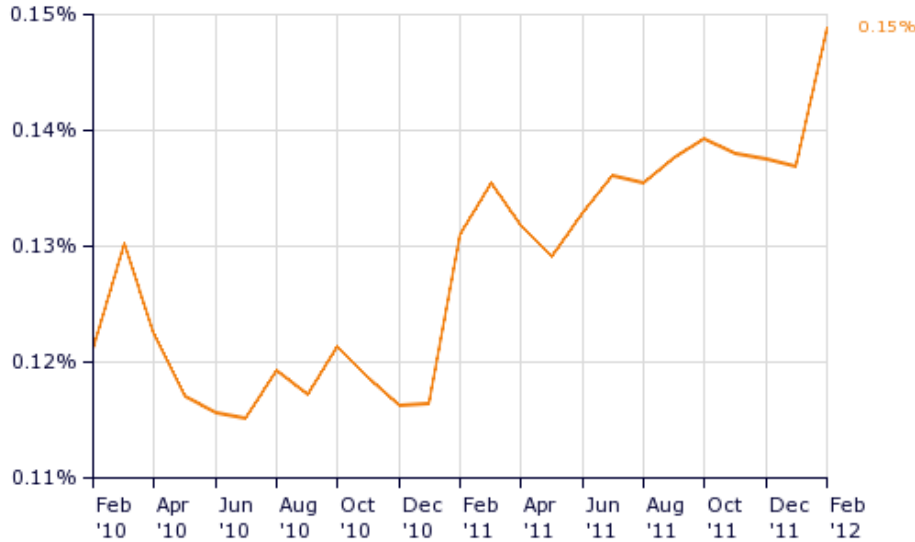
Overall, there has been a significant spike in customer and consumer Internet use for automotive aftermarket shopping and research purposes. In fact, overall Internet traffic in the category has grown by 23 percent in a little less than two years.

There are some key questions: How are customers using the Internet in the automotive aftermarket category? What organizations are capitalizing the most? What future trends will continue to shape overall Internet use among automotive aftermarket customers?



Automotive Aftermarket Internet Traffic Grows By 23% in Just Two Years

Market Share of Visits to Online Auto Aftermarket Retailers



Overall, the share of Internet traffic captured by the automotive aftermarket category grew by 23 percent in two years. In February 2010, the automotive aftermarket accounted for 0.12 percent of all Internet traffic. This share grew by 8 percent, reaching 0.15 percent by February 2012.

The organizations that are taking advantage of this trend tend to be well-known brands in the automotive aftermarket space. Although there are 633 automotive aftermarket Websites tracked by Experian Hitwise, a high concentration of Internet traffic goes to the top five sites. Autozone.com, Advance AutoParts, Auto Parts Warehouse, JC Whitney and Tire Rack captured more than 26 percent of the overall automotive aftermarket Web traffic.

Market Share of Visits by Online Auto Aftermarket Retailers

Most Popular Websites in Experian Auto - Auto Aftermarket Parts

Month of February 2012

Rank	Websites (633 returned)	Total Visits	Visits Share
1	Autozone.com	8,820,296	7.96%
2	Auto Parts Warehouse	6,445,135	5.81%
3	Advance Auto Parts	5,887,730	5.31%
4	Tire Rack	4,160,179	3.75%
5	JC Whitney	3,886,336	3.51%



Aftermarket Search Terms: Consumers Are Searching For Brands More Than Product Categories

Consumer use of search engines continues to grow significantly across the Internet and in the automotive aftermarket. More than 40 percent of all traffic on automotive aftermarket Websites is generated through searches on sites such as Google.com and Yahoo.com.

When consumers do search, they generally look for well-known brand names more than product categories. In fact, of the top 20 search terms, only two — “auto parts” and “tires” — were from product categories.

Search Terms driving traffic to Experian Auto - Automotive Aftermarket Parts

4 Rolling Weeks ending March 3, 2012

<input type="checkbox"/>	Search Terms (31,090 returned)	Search Clicks ▼
<input type="checkbox"/> 1	autozone	4.53%
<input type="checkbox"/> 2	advance auto parts	2.29%
<input type="checkbox"/> 3	summit racing	1.36%
<input type="checkbox"/> 4	tire rack	1.13%
<input type="checkbox"/> 5	discount tire	1.03%
<input type="checkbox"/> 6	pep boys	0.97%
<input type="checkbox"/> 7	auto parts	0.82%
<input type="checkbox"/> 8	napa auto parts	0.80%
<input type="checkbox"/> 9	auto zone	0.75%
<input type="checkbox"/> 10	advance auto	0.71%
<input type="checkbox"/> 11	napa	0.63%
<input type="checkbox"/> 12	rockauto	0.61%
<input type="checkbox"/> 13	ic whitney	0.58%
<input type="checkbox"/> 14	o'reilly auto parts	0.57%
<input type="checkbox"/> 15	oreilly auto parts	0.48%
<input type="checkbox"/> 16	auto zone auto parts	0.47%
<input type="checkbox"/> 17	tires	0.39%
<input type="checkbox"/> 18	jegs	0.39%
<input type="checkbox"/> 19	lmc truck	0.33%
<input type="checkbox"/> 20	autozone.com	0.30%

It should come as no surprise that the top search terms correlate with the sites with the most traffic. The top five search terms are “Autozone,” “Advance Auto Parts,” “Auto Zone,” “Tire Rack” and “Pep Boys.” The only search terms for generic product categories are “auto parts” (seventh) and “tires” (17th).

This information provides clear insight into the consumer mindset. Even in the automotive aftermarket, consumers are more inclined to gravitate toward well-known retail brand names than they are to search for generic product categories. Additionally, those same companies are investing in paid search to better promote their already well-known brands.

One more factor contributing to this search trend is that across the Web, consumers sometimes search for the company name rather than type it in their browser in order to reduce the chances that they will mistype the URL and end up on a malicious site. This trend is not unique to automotive, but it is worth noting.



Who Is Searching for Automotive Aftermarket Parts?

Mosaic USA 2011 Group of visitors to [Experian Auto - Automotive Aftermarket Parts](#)

4 Rolling Weeks ending March 3, 2012

	Mosaic USA 2011 Group (19 returned)	Visits Share ▼ Experian Auto - Automotive Aftermarket Parts
<input type="checkbox"/> 1	II Pastoral Pride	9.12%
<input type="checkbox"/> 2	I Family Union	7.83%
<input type="checkbox"/> 3	J Autumn Years	7.82%
<input type="checkbox"/> 4	L Blue Sky Boomers	7.73%
<input type="checkbox"/> 5	E Thriving Boomers	7.10%
<input type="checkbox"/> 6	C Booming with Confidence	7.09%
<input type="checkbox"/> 7	D Suburban Style	6.97%
<input type="checkbox"/> 8	O Singles and Starters	5.88%
<input type="checkbox"/> 9	M Families in Motion	5.48%
<input type="checkbox"/> 10	Q Golden Year Guardians	5.32%
<input type="checkbox"/> 11	H Middle-class Melting Pot	5.07%
<input type="checkbox"/> 12	F Promising Families	4.37%
<input type="checkbox"/> 13	B Flourishing Families	4.36%
<input type="checkbox"/> 14	P Cultural Connections	4.36%
<input type="checkbox"/> 15	S Struggling Societies	3.79%
<input type="checkbox"/> 16	A Power Elite	3.04%
<input type="checkbox"/> 17	K Significant Singles	2.75%
<input type="checkbox"/> 18	R Aspirational Fusion	1.26%
<input type="checkbox"/> 19	G Young, City Solos	0.67%

Mosaic® USA is a household-based consumer lifestyle segmentation system that classifies all U.S. households and neighborhoods into unique segments and overarching groups, providing a 360-degree view of consumers' choices, preferences and habits to enhance the understanding of households' lifestyles. More than 30 percent of consumers who visit automotive aftermarket parts sites fall into one of four Mosaic USA categories:

- *Pastoral Pride* — Eclectic mix of lower-middle-class widowed and divorced individuals and couples who have settled in the country and small towns
- *Family Union* — Midscale, middle-aged and somewhat ethnically diverse families living in homes supported by solid blue-collar occupations
- *Autumn Years* — Established, ethnically diverse and mature couples living gratifying lifestyles in older homes
- *Blue Sky Boomers* — Lower- and middle-class baby boomer-aged households living in small towns

This traffic pattern shatters two stereotypes: one, that the “tuner” crowd — or younger consumers who are likely to trick out their Honda Civic — are the primary online buyers in the automotive aftermarket, and two, that older consumers are not as computer-savvy as their younger counterparts.

In reality, the ubiquity of the Internet is on display here. Older consumers are online, and older consumers are actively searching for products and services, particularly in the automotive aftermarket.




Social Media as an Automotive Aftermarket Marketing Tool

Social media use has exploded in the past few years. According to Experian Hitwise, in February 2012, Facebook.com had more than 6.5 billion visits, YouTube.com had more than 2 billion visits, Twitter.com had 161 million, and there were 83 million for LinkedIn.com. Even the relative newcomer to this space, Pinterest.com, received more than 100 million visits.

In February 2012, 4.18 percent of all Web traffic in the automotive aftermarket came from social media sites. Though this is a relatively small slice of traffic, it is the third-largest source of traffic behind search engines (42.93 percent) and cross-shopping across other auto aftermarket part retailers (14.86 percent). Traffic from social media sites has grown by 52 percent compared with August 2009.

Upstream Industries visited before [Experian Auto - Automotive Aftermarket Parts](#)

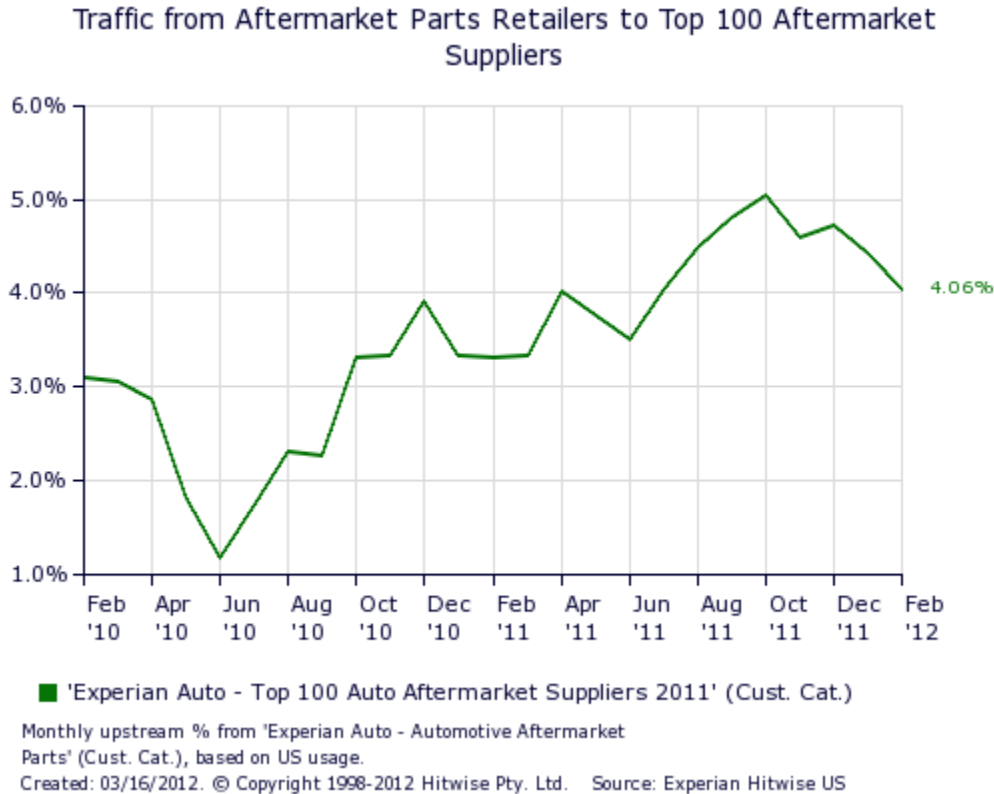
Month of February 2012

<input type="checkbox"/>	Industries (156 filtered results)	Clicks  ▼
<input type="checkbox"/>	1 Search Engines (Computers and Internet)	42.93%
<input type="checkbox"/>	2 Automotive (Shopping and Classifieds)	14.86%
<input type="checkbox"/>	3 Social Networking and Forums (Computers and Inter...)	4.18%
<input type="checkbox"/>	4 Auctions (Shopping and Classifieds)	3.84%
<input type="checkbox"/> ▼	5 Rewards and Directories (Shopping and Classifieds)	3.09%
<input type="checkbox"/> ▲	6 Email Services (Computers and Internet)	2.45%



Aftermarket parts online retail category

One of the most interesting trends in the aftermarket parts online retail category is the sudden increase in the amount of Web traffic coming to aftermarket supplier Websites from aftermarket retailer Websites. In February 2010, just 3.12 percent of supplier Web traffic originated from the aftermarket retail sector. By February 2012, that figure had jumped to 4.06 percent, a 30 percent year-over-year increase in traffic going to suppliers from retailers.



While it is too early to determine the specific cause in this spike in traffic, there are two likely scenarios. The first possibility is that consumers are going to retailers' Websites, not finding what they are looking for and subsequently moving on to supplier Websites to find more information.

A second scenario is that suppliers and retailers are working more closely together on an integrated strategy where suppliers are supporting their retail partner Internet efforts by providing more product-specific content, which is increasingly required to meet the needs of their consumer and commercial customer base.

Either scenario results in the same conclusion. Aftermarket retailers and suppliers will benefit by providing the detailed content via the Internet that their customers clearly require.



AASA Members Count on Brand to Drive Traffic

AASA publishes an annual guide to the biggest players in the North American automotive aftermarket industry. In conjunction with AASA, Experian has created a Hitwise category to provide insights into the companies listed within the 2011 edition of *Top 100 Aftermarket Suppliers*.

The top-visited automotive aftermarket search term among AASA member companies is “Sherwin Williams,” and the third is “Sherwin Williams Paints.” These terms were among the top terms for ratio of paid search terms versus organic search terms. For “Sherwin Williams,” 22.13 percent of search-related traffic comes from paid search terms versus 77.87 percent from organic search terms.

Overall, however, many AASA companies are depending on 100 percent organic search to drive traffic to their sites. The fifth-, sixth- and seventh-leading search terms include “johnson controls,” “goodyear” and “shell,” respectively. This indicates that it is more important to have a well-known brand. Top-of-mind companies often are used as search terms.

Search Terms driving traffic to [Experian Auto - Top 100 Auto Aftermarket Suppliers 2011](#)

4 Rolling Weeks ending March 10, 2012

<input type="checkbox"/>	Search Terms (1,903 returned)	Search Clicks ▼	Paid:Organic Rate	
<input type="checkbox"/> 1	sherwin williams	8.51%	22.13%	77.87%
<input type="checkbox"/> 2	goodyear tires	2.03%	79.57%	20.43%
<input type="checkbox"/> 3	sherwin williams paint colors	1.56%	0.00%	100.00%
<input type="checkbox"/> 4	tires	1.16%	65.10%	34.90%
<input type="checkbox"/> 5	johnson controls	1.15%	0.00%	100.00%
<input type="checkbox"/> 6	goodyear	1.13%	48.98%	51.02%
<input type="checkbox"/> 7	shell	1.08%	0.00%	100.00%
<input type="checkbox"/> 8	sherwin williams paint	1.01%	55.99%	44.01%
<input type="checkbox"/> 9	snap on	0.95%	0.00%	100.00%
<input type="checkbox"/> 10	dorman	0.82%	0.00%	100.00%
<input type="checkbox"/> 11	k&n	0.80%	0.00%	100.00%
<input type="checkbox"/> 12	magnaflow	0.75%	0.00%	100.00%
<input type="checkbox"/> 13	paint colors	0.73%	0.00%	100.00%
<input type="checkbox"/> 14	exxon mobil	0.72%	0.00%	100.00%
<input type="checkbox"/> 15	bp	0.67%	0.00%	100.00%
<input type="checkbox"/> 16	snap on tools	0.62%	0.00%	100.00%
<input type="checkbox"/> 17	dorman products	0.61%	0.00%	100.00%
<input type="checkbox"/> 18	cooper tires	0.58%	0.00%	100.00%
<input type="checkbox"/> 19	firestone	0.54%	0.00%	100.00%
<input type="checkbox"/> 20	ppg	0.48%	0.00%	100.00%



Search Terms driving traffic to AASA Top 100 Aftermarket Suppliers (w/o Sherwin Williams)

12 Rolling Weeks ending March 10, 2012

<input type="checkbox"/>	Search Terms (4,474 results before filters applied)	Search Clicks ▼	Paid:Organic Rate	
<input type="checkbox"/> 1	goodyear tires	2.46%	81.86%	18.14%
<input type="checkbox"/> 2	goodyear	2.02%	55.75%	44.25%
<input type="checkbox"/> 3	snap on tools	1.38%	0.00%	100.00%
<input type="checkbox"/> 4	johnson controls	1.32%	0.00%	100.00%
<input type="checkbox"/> 5	dorman	1.32%	0.00%	100.00%
<input type="checkbox"/> 6	cooper tires	1.29%	0.00%	100.00%
<input type="checkbox"/> 7	snap on	1.28%	0.00%	100.00%
<input type="checkbox"/> 8	shell	1.23%	0.00%	100.00%
<input type="checkbox"/> 9	tires	1.20%	55.27%	44.73%
<input type="checkbox"/> 10	bp	1.03%	13.50%	86.50%
<input type="checkbox"/> 11	magnaflow	1.02%	0.00%	100.00%
<input type="checkbox"/> 12	exxon mobil	0.99%	26.39%	73.61%
<input type="checkbox"/> 13	dorman products	0.94%	0.00%	100.00%
<input type="checkbox"/> 14	k&n	0.93%	0.00%	100.00%
<input type="checkbox"/> 15	firestone	0.69%	0.00%	100.00%
<input type="checkbox"/> 16	valvoline	0.63%	0.00%	100.00%
<input type="checkbox"/> 17	goodyear credit card	0.62%	37.18%	62.82%
<input type="checkbox"/> 18	eaton	0.55%	0.00%	100.00%
<input type="checkbox"/> 19	ppg	0.54%	0.00%	100.00%
<input type="checkbox"/> 20	exxonmobil	0.41%	0.00%	100.00%



Conclusion

Overall, the automotive aftermarket industry has been hesitant to jump into Internet marketing with both feet. If this continues, it will be a mistake for the industry.

Internet use and social media will continue to grow. In addition, consumers are becoming more comfortable shopping and purchasing every manner of service and product imaginable online. In short, the Internet isn't going away.

However, even though the Internet is pervasive, traditional brand recognition will remain important. Consumers naturally gravitate to what they know. This will continue online. When people enter search terms, it is highly likely they will enter brand names with which they already have a relationship.

This will provide a natural advantage to major players that already have invested in building a brand. These companies will need to continue their traditional advertising and marketing activities, including television and radio advertising. Online efforts, while they will lead directly to sales, will be most effective when combined with a fully integrated marketing campaign.

AASA companies that have not developed a strong consumer brand face a difficult decision with their Internet marketing efforts. Should they invest in generating a stronger consumer brand, or should they develop a strategy with their retail partners?

Both strategies have inherent pros and cons. Developing a strong brand will allow companies to take more control over their Internet marketing efforts. However, investing in creating a strong consumer brand takes time and resources. Companies seeking immediate returns might be better off collaborating with their retail partners. This will minimize investment up front but also will cede significant control of online strategy to retail partners.

Whichever strategy companies choose, one factor will remain. Content is still king on the Internet. A successful Internet strategy will depend on providing comprehensive but easy-to-navigate product information. Developing both an understanding of what your customers are looking for and the content to meet these needs always will remain a critical component of automotive aftermarket online retail success.

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