



Research & purchasing of auto aftersales products

Usage of the Internet and other sources in the French automotive aftersales market

JULY 2011

OBJECTIVES

Understand how French consumers use the Internet and other sources to research and purchase automotive aftersales products

METHODOLOGY

Online survey – Ipsos Access Panel – amongst internet users who searched for or bought auto parts, services, tyres or accessories in the past 6 months

Key findings



The internet is **a key auto aftermarket info source**, which is used across the entire purchasing process, i.e. from initial research to purchase ...



... and online is **projected to become more important** in the future



Widespread use of search engines within the automotive aftermarket



Search engines also key amongst the population that **uses mobiles to search** for automotive aftermarket items – use of mobiles projected to grow going forward

Study design

PRIMARY OBJECTIVE: Understand how consumers use the Internet and other sources to research and purchase automotive aftersales products, specifically:



Parts



Services



Tyres



Accessories

SAMPLE SIZE

n=2,145 internet users

TARGET





Searchers / purchasers of parts, services, tyres or other car accessories

FIELDWORK CONDUCTED





June 2011

The internet is a key auto aftermarket info source

The most frequently consulted source amongst consumers searching for accessories and the second most frequently consulted source for tyres.

Source of information...	Total	 Parts	 Services	 Tyres	 Accessories
Retailer	47%	42%	30%	36%	37%
Usual mechanic	41%	28%	43%	28%	n/a
Internet	37%	27% ³	19% ⁴	28% ²	39% ¹
Automotive dealership	29%	20%	30%	15%	11%
Relatives, friends, colleagues	24%	16%	17%	12%	15%

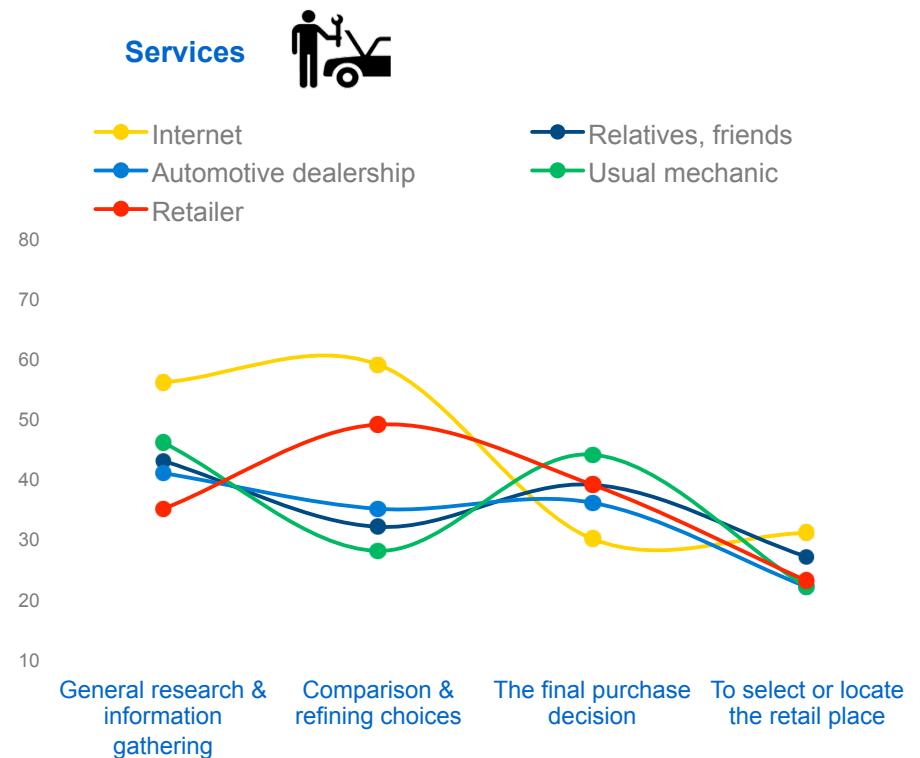
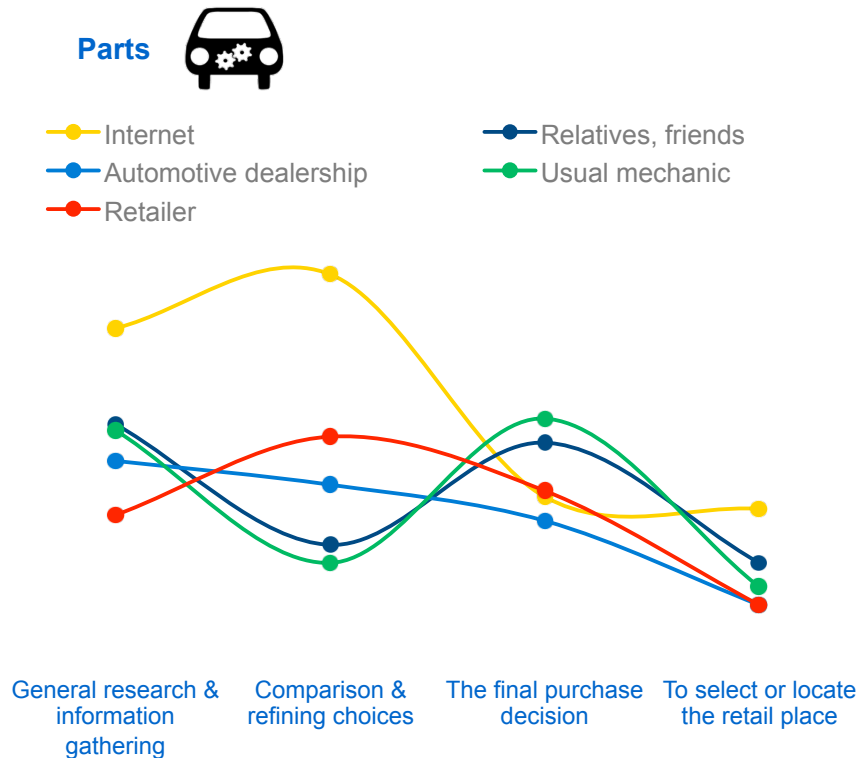
Items searched for within categories

Parts 	Services 	Tyres 	Accessories 
Windscreen wiper 13%	Tire installation & maintenance 15%	Standard tyres 35%	Navigation systems 19%
Brake related parts 12%	Regular maintenance 13%	Winter/snow tyres 16%	Babies/children's' seat 8%
Lights 10%	State inspection 11%	Performance tyres 13%	Hands-free kit for mobile phone 6%
Fluids, lubricants, oils 9%	Brake repair and adjustment 5%	Light truck/SUV tyres 4%	Car stereo 6%
Engine or transmission related parts 7%	Windscreen or windows repair 4%	Ultra high performance tyres 1%	Racks 6%
Air filters and exhaust system parts 6%	Cleaning services 4%		Rim, hubcap and other things related to the tyre 6%
Battery 6%	Steering and suspension service 4%		Floor mats 5%
Exterior related parts 6%	Body repair 3%		Seat cover 4%
Electricity and start-up 5%	Muffler & exhaust repair/service 3%		Sun visor 3%
Direction and suspension parts 5%	Engine repair 2%		Trunk mat 3%

Search plays key role across purchase journey

When searching for **parts and services**, the internet is key in terms of gathering information, comparing products and locating a shop / seller

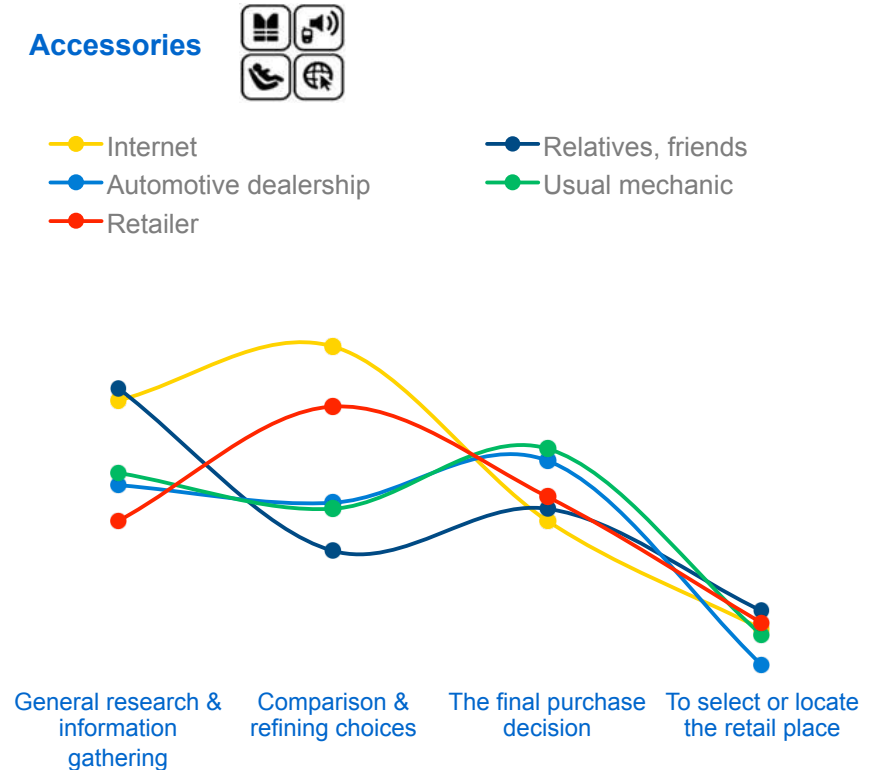
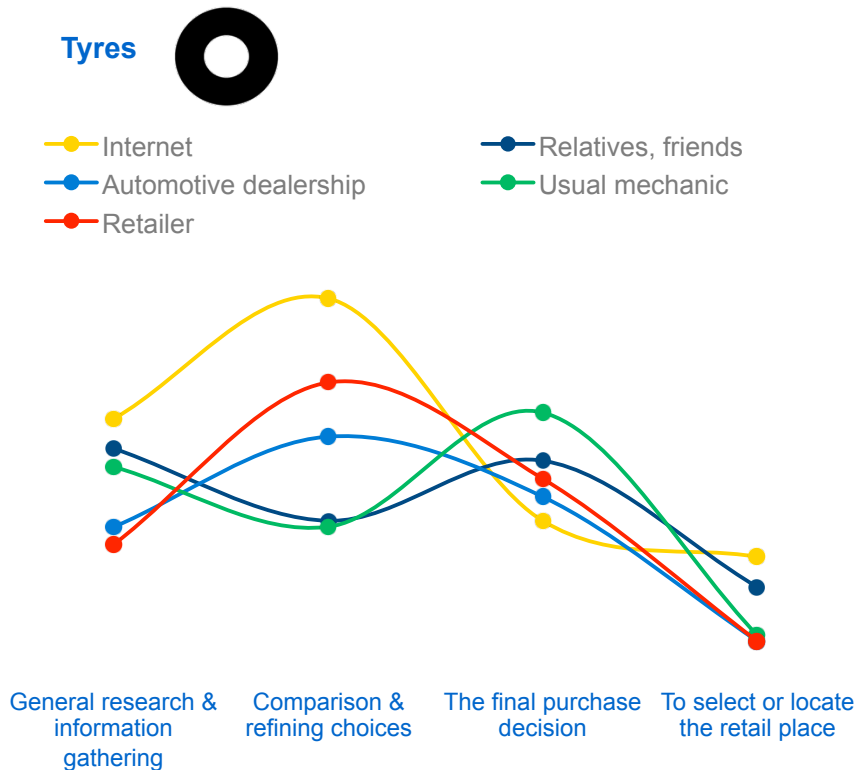
Sources of information used throughout purchase journey...



Search plays key role across purchase journey

When searching for **tyres and accessories**, the internet is also an important means of gathering information, comparing products and locating a shop / seller

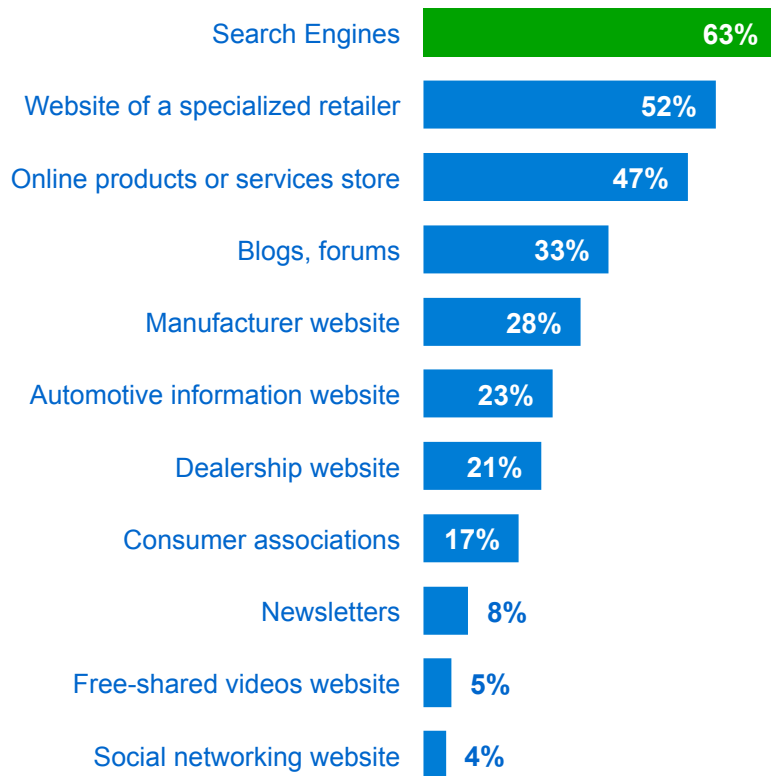
Sources of information used throughout purchase journey...



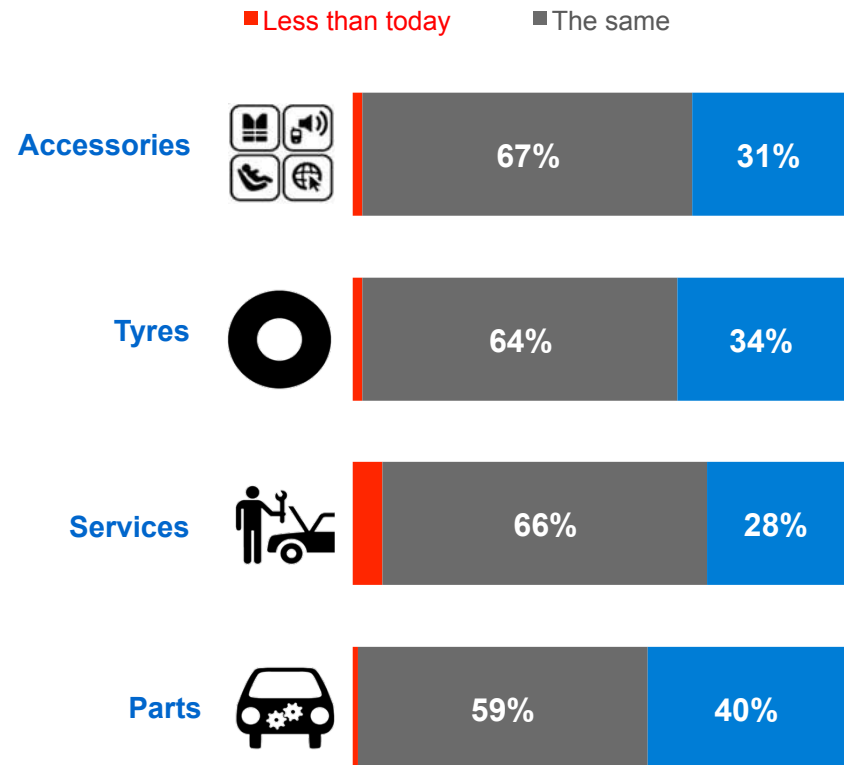
Search engines = most consulted web source

Not only search engines more widely used than any other online resource but usage of online for automotive aftermarket related search is projected to grow in the future

Consulted online sources



Projected online research usage



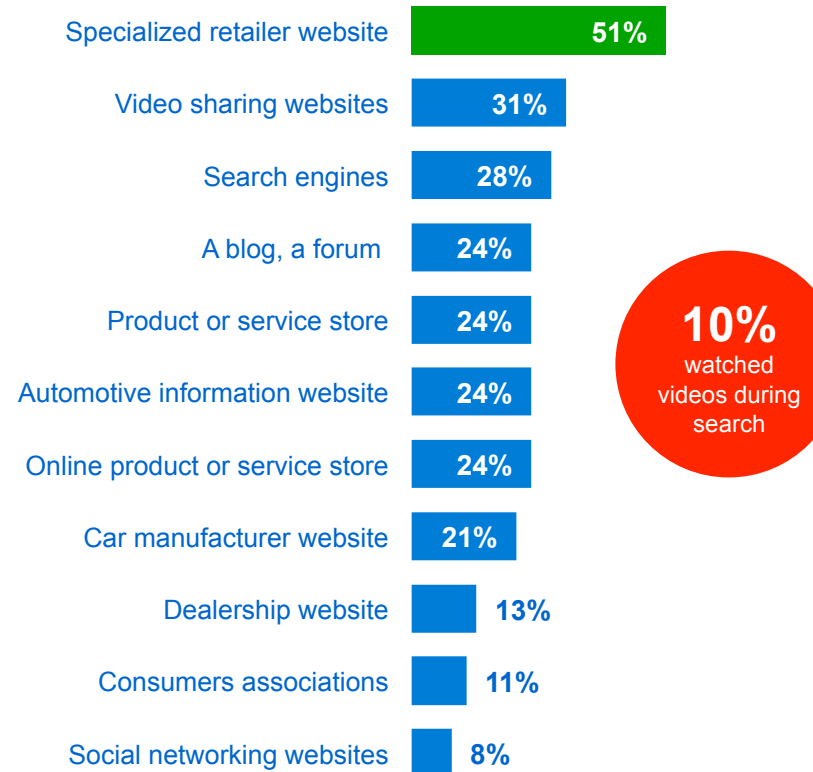
Consumer generated content widely consulted

Of particular prominence are consumer reviews.

Reasons for consulting blogs, forums, etc.

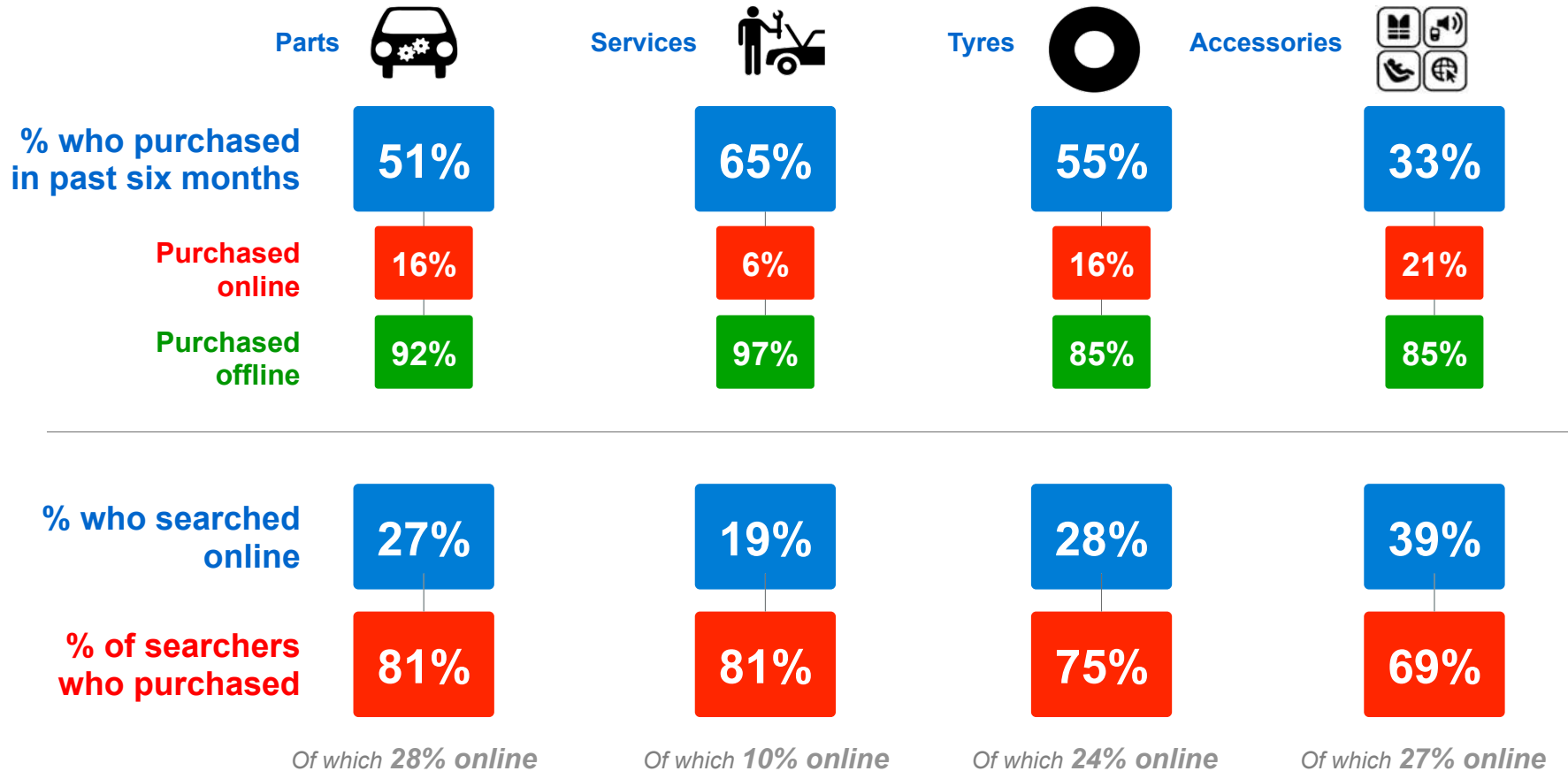


Sites videos were watched on



Purchases mainly done offline

Parts and services have the highest conversion rate from online search to ultimate purchase (although majority of purchases made offline).



Mobile search widely used & likely to increase in future

Mobile search is key in terms of gathering information, comparing products and locating a shop / seller (much like online search)

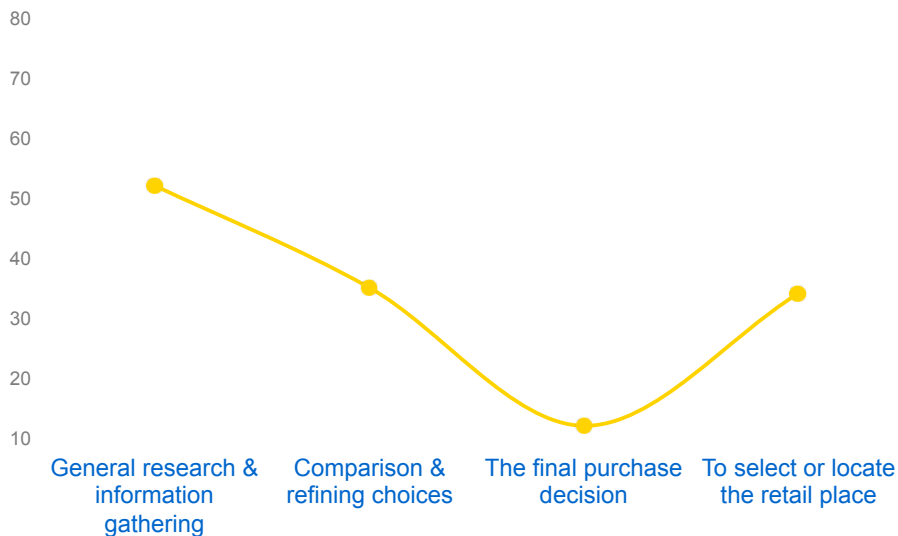
14%

of searchers use their mobile device to search for automotive aftermarket items

27%

Expect that they will use mobiles a lot more or slightly more than today when searching for automotive items

● Mobile use



Sources consulted from mobile

