Auto Parts Stores Satisfy a Need-it-Now Mindset

The worldwide automotive afterparts market will exceed $1 trillion by 2022* The U.S. makes up about a third of that market. What does that mean for the brick-and-mortar auto parts industry?

Do-it-yourselfers want to save money by making their own repairs. Independent auto mechanics often purchase parts from their neighborhood store rather than buying OEM parts. This study looks at the visit behavior of both types of buyers across 4 national auto parts stores.

Emodo

The Afterparts Market Relies on Foot Traffic

Amazon, Ebay and Walmart.com dominate the online market—and drive its growth. However, many people who fix cars need their parts right now. Some may need to have the tactile experience of seeing and touching the part to confirm it will fit properly. In the past 10 to 15 years, the consumer side of the auto-parts retail sector has seen a dip in visits, but it's still very much an industry that relies on foot-traffic.

AutoZone is the Last Stop. Emodo foot traffic analytics show that a visitor will often go to one auto parts store and within the hour, visit another. Across the four auto parts retailers, AutoZone is typically visited by consumers who begin their journey at a NAPA, O'Reilly or Advance Auto Part store. Interestingly, when they start shopping at AutoZone, they tend to only shop at AutoZone.

Different Shops for Different Shoppers: There's a clear correlation, particularly late in the week or on the weekend, between AutoZone and Advance Auto Parts as do-it-yourselfers make last-minute preparations for their weekend in the garage. Compare that to auto mechanics who visit Napa on a Monday or Tuesday, then often complete their shopping at AutoZone an hour or so later.

The Do-it-Yourselfer vs. the Auto Mechanic

Weather permitting, a do-it-yourselfer will visit an auto parts store on Friday night or Saturday morning to have what they need to change their oil—or their floormats.

Those weekend projects change with the season. Friday and Saturday visitors dropped off dramatically between September and October as the weather began to chill. The number of visits by do-it-yourselfers remains high while the weather stays warm. In October, traffic begins to fall.

Repair shops, however, appear to stay consistent with their auto parts suppliers. Wednesdays and Thursdays are likely the most popular days for vehicle service—most visits occurred during late afternoon on Tuesdays and Wednesdays.

Notably, Napa stores still have heavy midweek Mechanic foot traffic despite the fact that they deliver.
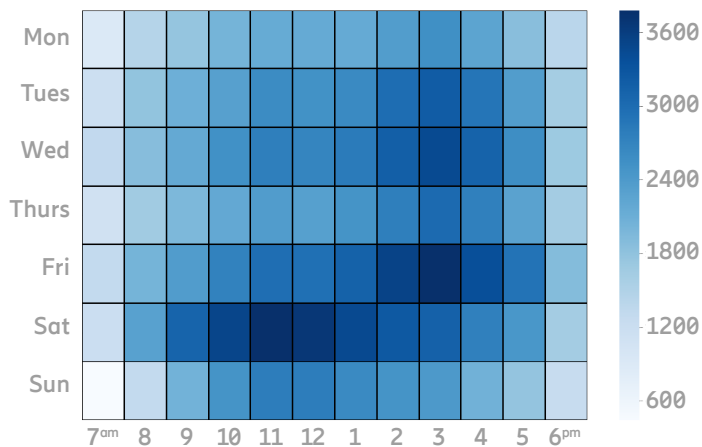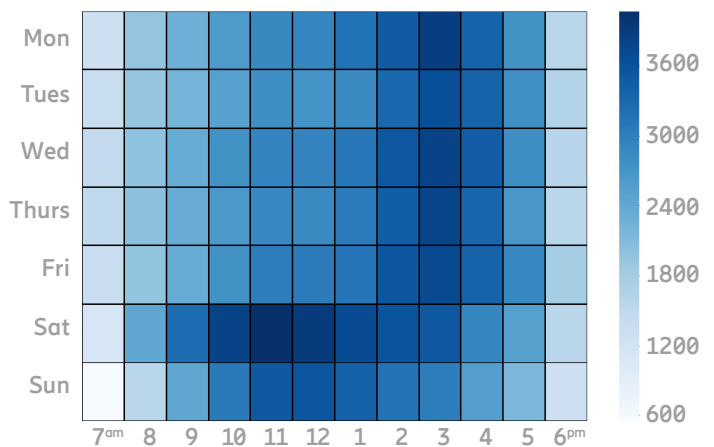
Visits by Hour in September

NAPA Auto Parts
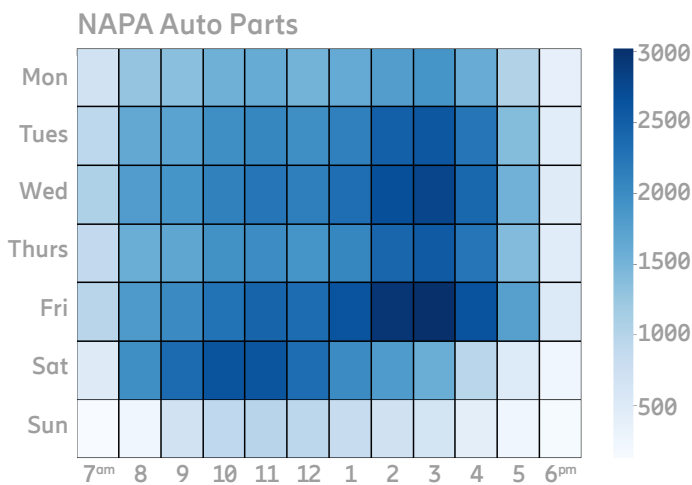
AutoZone

Visits by Hour in October

#### NAPA Auto Parts
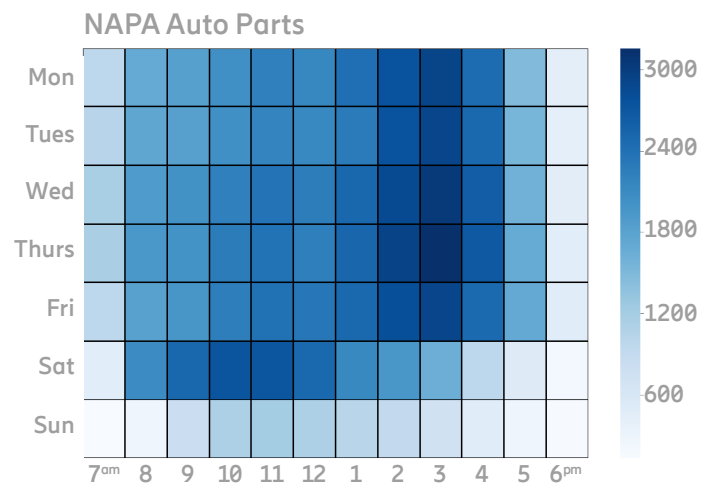
AutoZone

Where Do Shoppers Go on Sunday, When Napa Stores are Closed?

With Napa stores closed on Sundays, the competitive dynamic across the market changes. The spikes in this daily index view bring up the overall index for AutoZone and O'Reilly, while Advance Auto Parts holds steady in comparison. Napa, aside from those Sunday dips, holds consistent throughout the rest of the week.

Auto-parts chains, like other retailers, are likely seeking new marketing opportunities and methods for increasing sales. Armed with visit, visitor and competitive insights like these, they now have more places to look and more strategies to uncover.

3 Month Snapshot of Foot Traffic
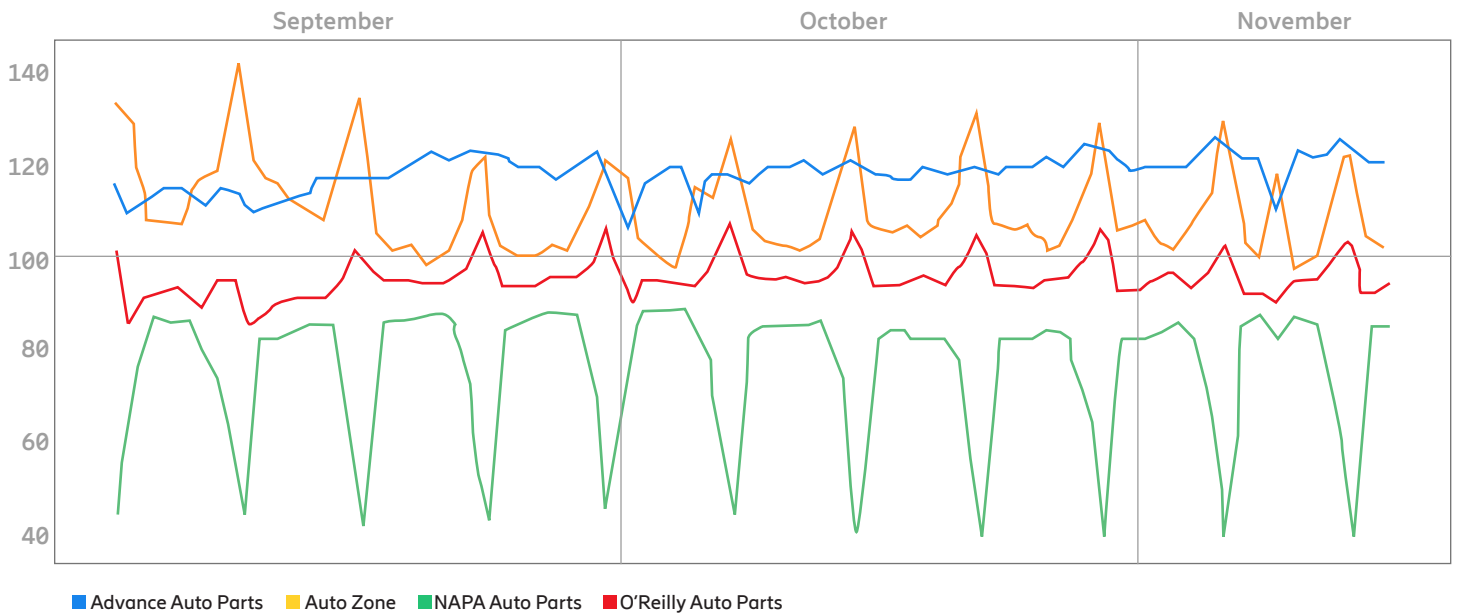
Indexed view: The horizontal baseline equals a single visit from a single visitor. A line that hovers around 80 means that a visitor would have visited that store on average .8 times in that week, as compared to a line that hovers around 120 means the visitor would have gone an average of 1.2 times in that same time period.

Methodology

Emodo uses carrier data to identify and eliminate the inaccuracies inherent in SDK, GPS and other marketing data. Further, Emodo uses the carrier-verified, carrier-filtered data to inform hundreds of millions of anonymous device profiles and continually build and refine highly targetable audiences. Carrier intelligence makes it possible to accurately track the consumer's Mobile Journey at scale.

For this case study Emodo's examined consumer data about auto parts shopping habits. More specifical-ly we focused on two groups of visitors—the auto mechanic and the do-it-yourselfer— Both groups were identified based on their foot traffic patterns to AutoZone, Advance Auto Parts, Napa, and O'Reilly and other places over a period of three months.