



NCMA Catalog Usage Survey for the Automotive Aftermarket: 2008

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DRIVING THE AFTERMARKET INDUSTRY

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Introduction

Counter men, repair shop service managers and supervisors are considered the primary users of Automotive Aftermarket manufacturers' parts catalogs. A study of how they view the quality and effectiveness of the various publications used to distribute catalog application information has been of interest to members of the National Catalog Managers Association (NCMA) for many years. Conducted by the AAIA Market Research staff and with assistance from Babcox Publishing, the 2008 NCMA Catalog Usage Survey presents the findings of a questionnaire designed to study the catalog and Internet usage habits of counter men and installers.

The methodology of this study involved two web surveys sent out to two different target markets; the first being part store counter men, which had 419 respondents and the second being repair shop installers, which had 490 respondents. In addition to obtaining research regarding catalog and Internet usage habits, the survey helped improve the understanding of the relative importance of paper, electronic, CD and Internet as information sources.

“What information sources do you use?”

According to the survey results, when asked about the types of information sources they use, 86 percent of countermeisters said they use manufacturers’ paper catalog, 84 percent use full-line electronic catalogs, 70 percent use manufacturers’ web catalogs while 32 percent use manufacturers’ CD’s.

A follow-up question was asked to learn where they turned first to look up a parts application and at this point, respondents overwhelming voted in favor of electronic sources. In fact, 86 percent of respondents said they turn to an electronic or web catalog first for parts look-ups.

The NCMA research clearly indicated that parts professionals prefer to use electronic catalog systems and that they only turn to paper catalog and other sources when they cannot find a clear and complete listing in the electronic sources. The leading request made by the parts professional to their suppliers at the NCMA conference was for more technical content, more product images, more charts, tables and drawings in the electronic catalog. “We only reach for the paper catalog when we can’t find what we need in the electronic catalog versions”, they said.

Goals & Objectives

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AAIA[®] **Automotive Aftermarket**
Industry Association

Project Initiated by:

Mark Seng

8/10/07

Goal: To study catalog and internet usage by
Counter men and Installers

Objective: Obtain primary research regarding:

1. **Cataloging concerns and usage habits**
2. **Ways manufacturers can help with data**
3. **Improved understanding of the importance of paper v. electronic**
4. **Internet availability**
5. **Primary uses for internet**

Method: Phone survey (or open to better alternatives)

Timing: Present results at the May 2008 NCMA Conference
Conference attendees would also get handout of
results.

General Comment

- NCMA managers want relevant information concerning what is going on:
 - At the point of sale and
 - At the point of installation with regards to their data.
- From the survey, members should be able to:
 - Deduce what actions they can take to address the needs expressed by the survey respondents.

Action Items

- Assess the attitudes of counter men and installers regarding quality of and reliance upon:
 - **Paper catalogs,**
 - **Electronic catalogs,**
 - **Manufacturer internet catalogs, and**
 - **Other electronic information required at point of sales such as images, tech bulletins, product specs, etc.**
- Identify one or two key things manufacturers should focus on to best service the point of sale.
- Gain understanding of penetration of high-speed internet availability at the counter and at the installer.
- Determine how the internet is leveraged and how manufacturers could improve the information available.

NCMA Member Opportunities

- To leverage this survey in future years without much additional effort
- To help catalog managers spot evolving trends and take strategic action
- To help achieve continuous improvement

Questionnaire Design & Methodology

Acknowledgements

Project leaders: Mark Seng and Scott Lockett

NCMA Catalog

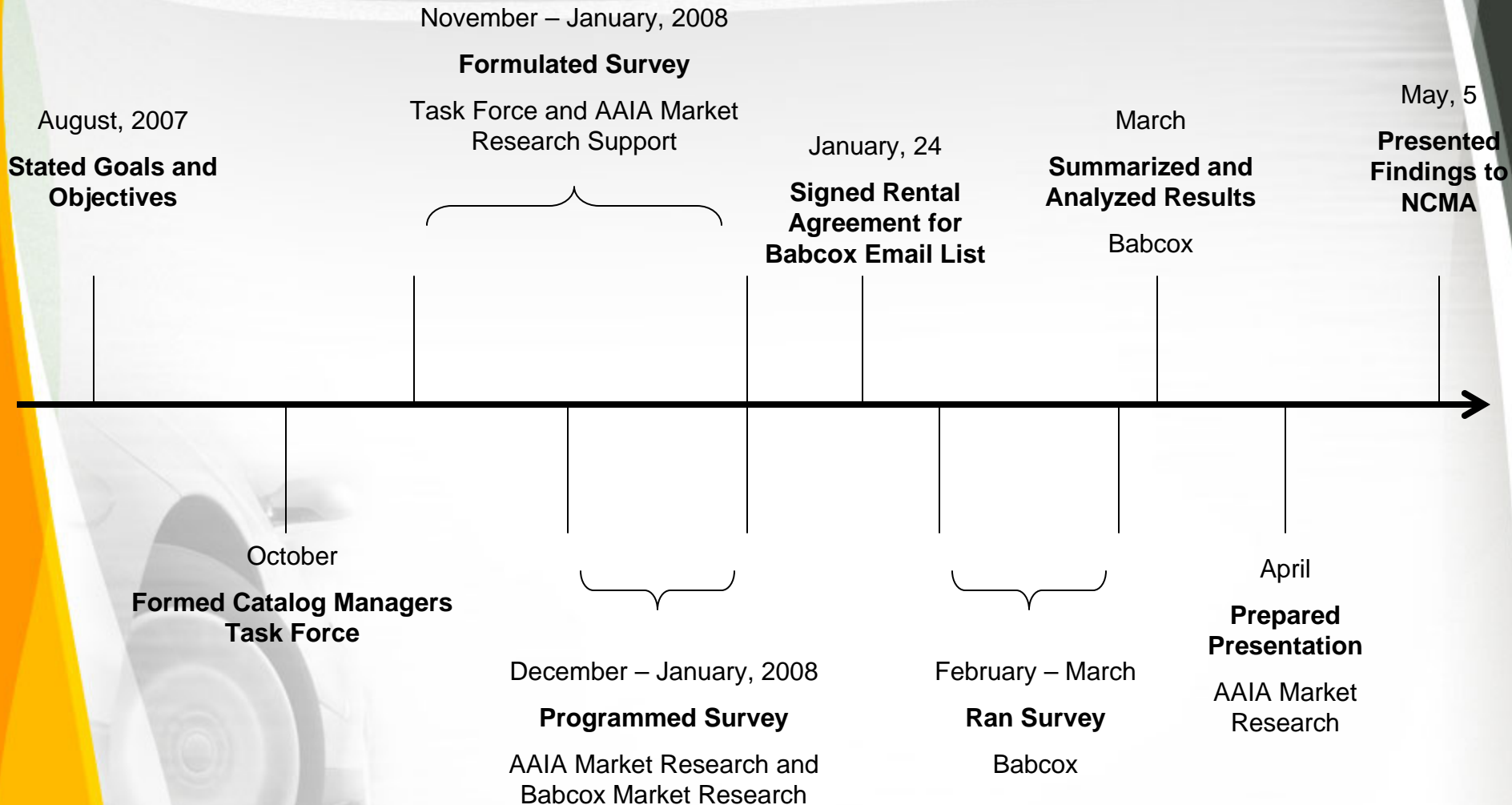
Manager Task Force: Allen Kekel, Chris Nierintz, Mark Richardson, Bob Waibel

Babcox Publishing: Don Hemming, Jon Owens, Bob Roberts, Jeff Stankard

AAIA Market Research: Fiona Kong, Daniel Majcen, Ron Rossi

Timeline

(August, 2007 to May, 2008)



Survey Groups

NCMA rented email lists from Babcox Publishing. These lists have been compiled over the years based upon Babcox subscribers to the various magazines listed below. In addition to email addresses, the Babcox database includes job titles and it was through this linkage of subscriber to job title that we were able to target the appropriate audiences:

- Countermen who read *Counterman Magazine*
- Service Managers and Supervisors who read *Tire Review, Import Car, Underhood Service and Brake & Front End.*

Survey Group 1: Parts Stores

- Counterman = 419
- Total Emails Distributed = 2,793
Response Rate: 15%

Survey Group 2: Repair Shops

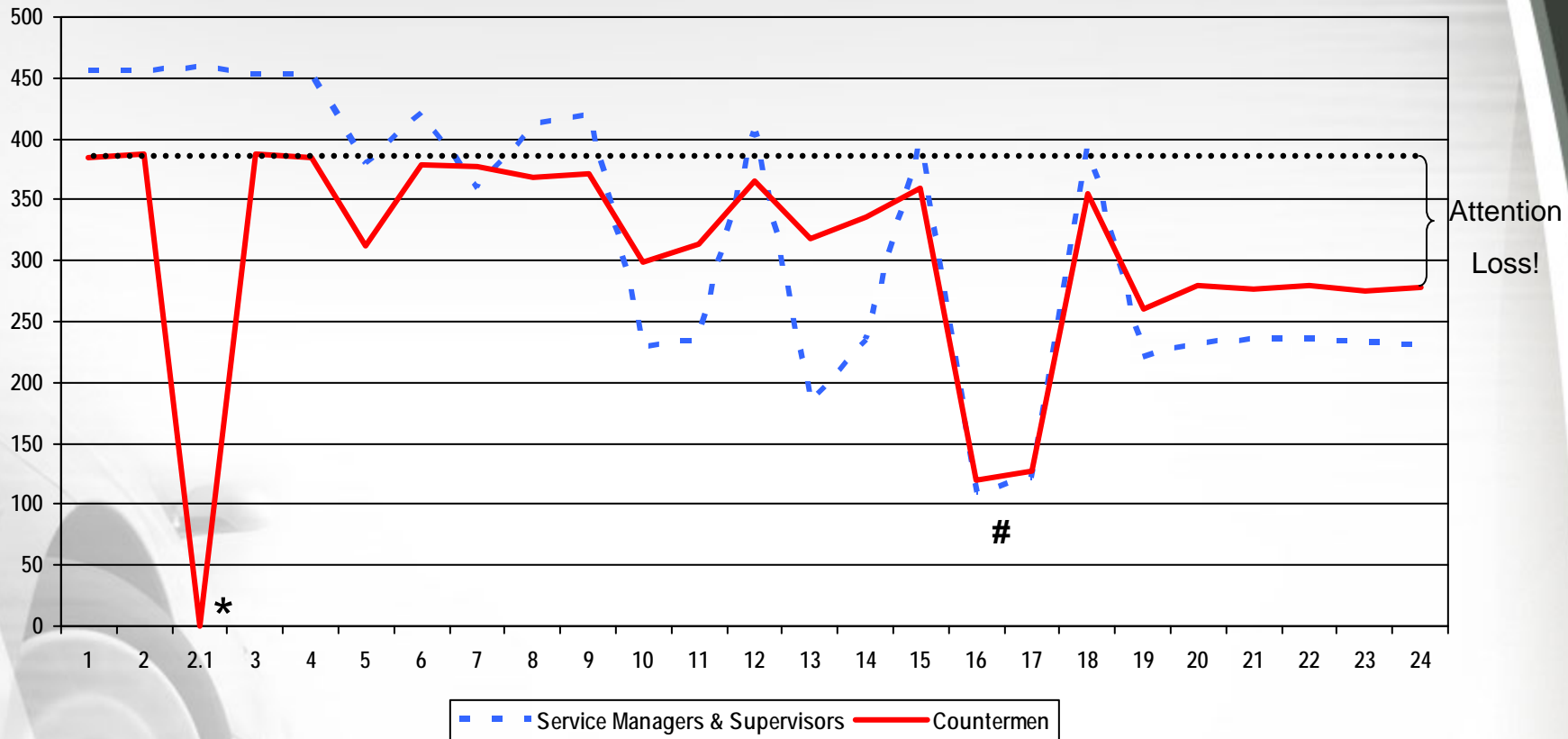
- Tire Review = 119
 - Import Car = 77
 - Underhood Service = 161
 - Brake & Front End = 133
- Total for the repair shop segment = 490
Total Emails Distributed = 9,800
Response Rate: 5% = Typical

The response rate of 15% for the parts stores and 5% for the repair shops were the result of the initial mailing plus reminders.

Although this gap between the two groups was larger than expected, it appears the respondents in the parts stores had a higher level of interest in the subject.

Survey Response Volume by Question

24 Questions in 10 Minutes...
Anything longer and folks won't stay!



* Question did not apply to Counterman

Question applied to CD users only