



WOLK & NIKOLIC AFTER SALES INTELLIGENCE GMBH

wolk & nikolic
after sales intelligence

COMPANY PRESENTATION



Wolk & Nikolic After Sales Intelligence GmbH is a leading company in the field of Automotive Aftermarket Intelligence and provides neutral market information, consulting service and implementation advice with a strong focus on the automotive after-sales market.

>30

Years experience

28

Employees

+250

Customers

HQ

Cologne, Germany

Market Insights

After Sales ACCESS Database
Market analyses, E-Commerce insights,
parts purchasing analyses, market share
analyses, future scenarios, Addresses,
AutoView, Market potential in total or part
groups

Market Research

Car driver surveys, Workshop surveys,
Brand studies, competitor analysis,
advertising tests, car configurator /
customer journey analyses, 'Why not?'
studies, BIX, Trend Tacho,



Pricing

Price monitor - mystery calling or online
research, availability index, price setting,
Online and per telephone tools for market-
oriented pricing

Consulting

Strategy consulting, dealer and workshop
consulting on-site, professional seminars,
training and coaching on the job,
implementation of concepts,

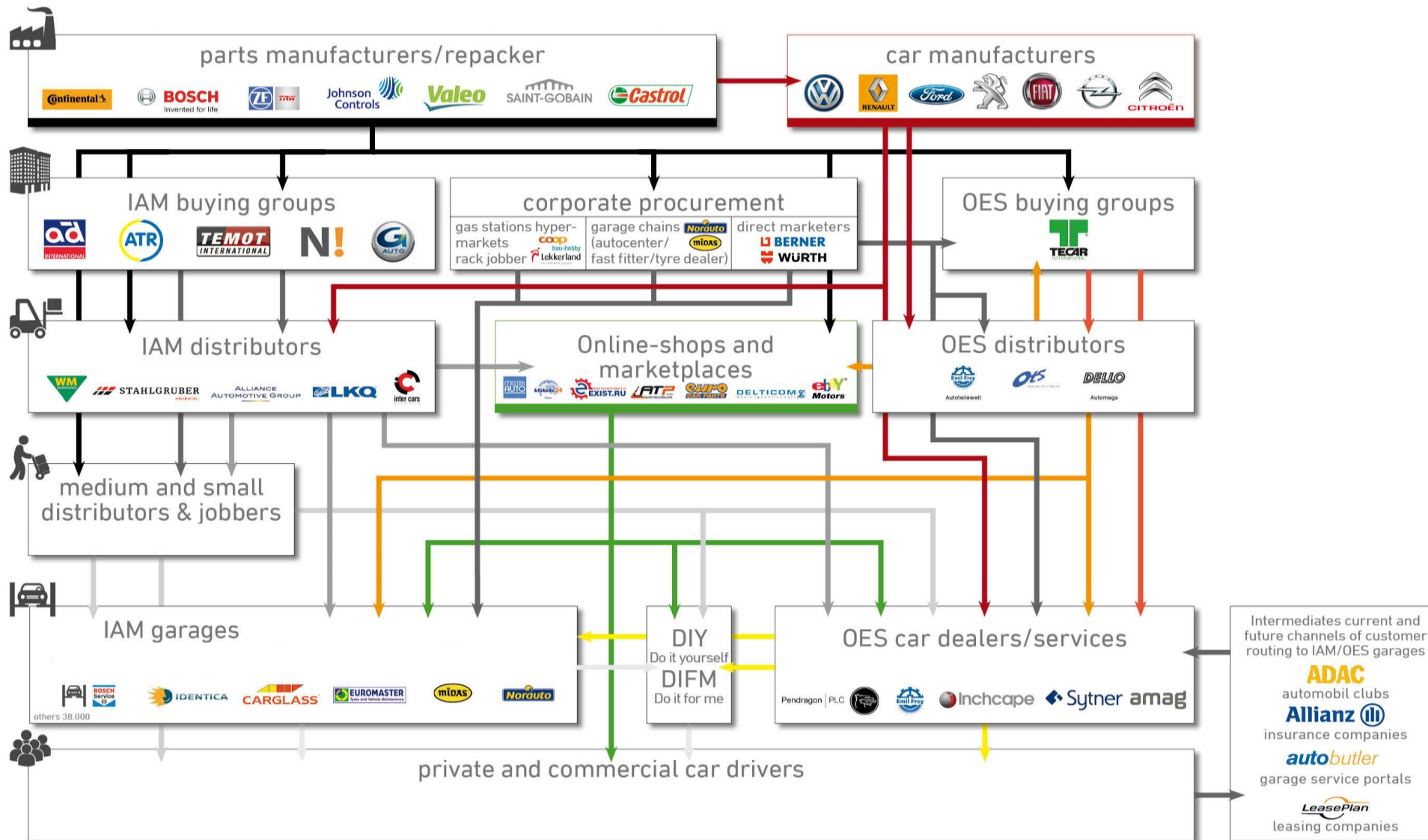
Sales Performance

Mystery Shopping, Lead Tests, Audits,
Performance Programs



Aftermarket Data & Analytics

Databases and multi client reports for mastering sales and marketing tasks in the automotive aftermarket.





KEEP AN EYE ON THE AUTOMOTIVE AFTERMARKET ALWAYS AND EVERYWHERE!

The After Sales ACCESS database gives you access to exclusive market data that helps you to understand and keep an overview of all 35 European aftermarkets.

The after sales database provides insights into the market structures and market participants at all levels of trade, including workshops. The data is permanently and carefully researched by our team and our partner experts.

Get an overview and stay up to date.



Distributors Overview



Trade & Buying Groups



Garage Structures



Market Volumes



Vehicle Data

Company profiles of more than 9000 companies distributing automotive components.

Overview of the trade and buying groups active in Europe and their members.

Number of workshops by type in all 35 European countries.
Subdivided into branded workshops, independent workshops, tyre specialists, automotive glass specialists, and automotive paint specialists.

Aftermarket volume in value of parts on end-consumer level by 10 product groups and IAM/OES split.

Development of the vehicle population for cars, trucks and buses.
New registrations
Average age
Age segments
Average annual mileage



Top E-Commerce players per country by traffic and channel in Europe.



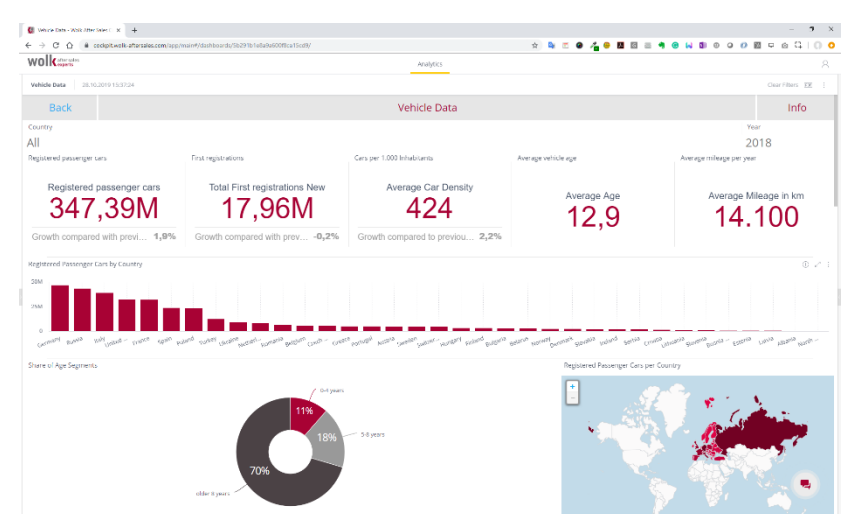
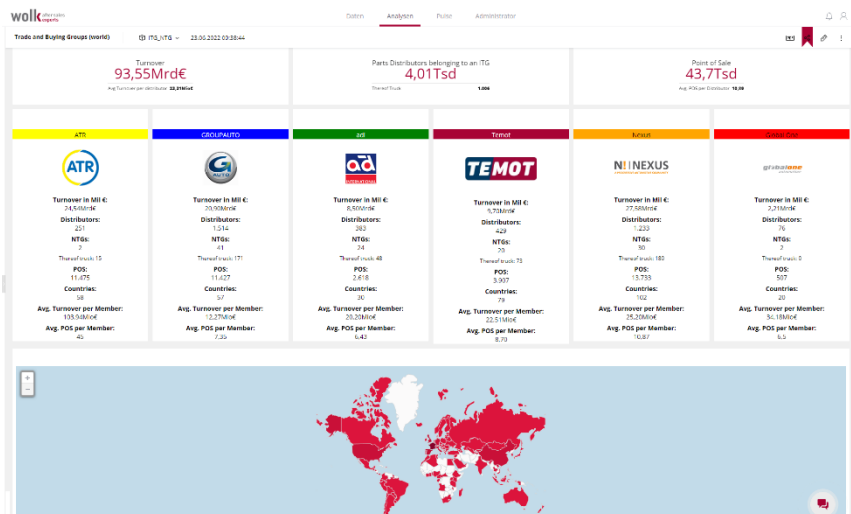
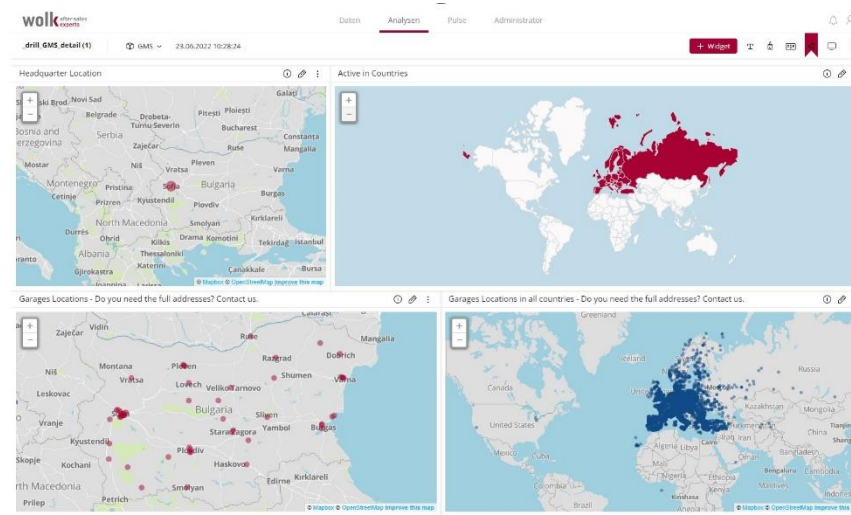
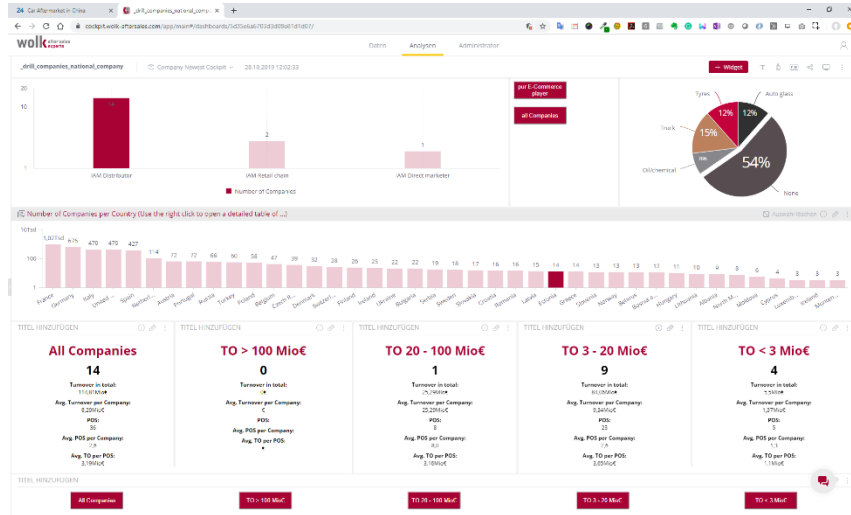
Ebay insights

Sales figures of most relevant accounts for car parts in eBay Germany.



A worldwide collection of portals that are specialized on helping car drivers to find nearby car service or maintenance.

AFTER SALES ACCESS DATABASE



AFTER SALES ACCESS DATABASE - VIDEO



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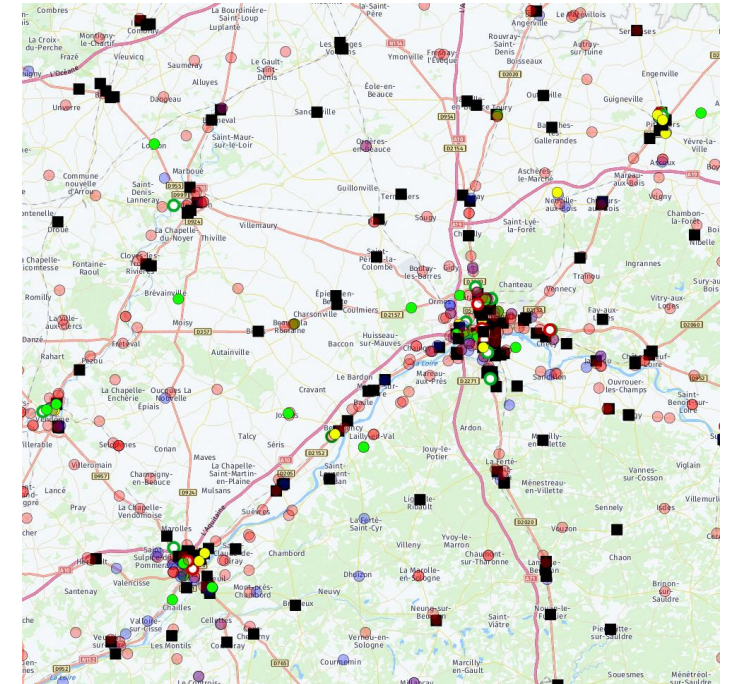
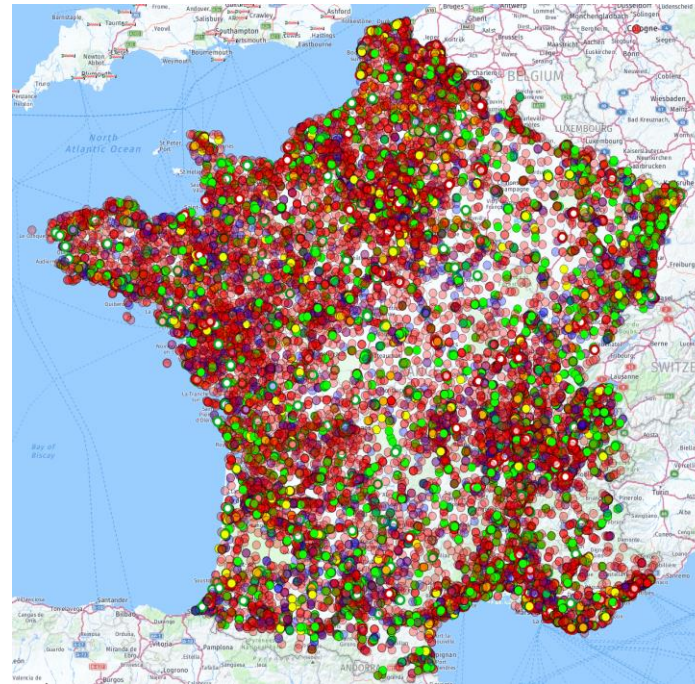
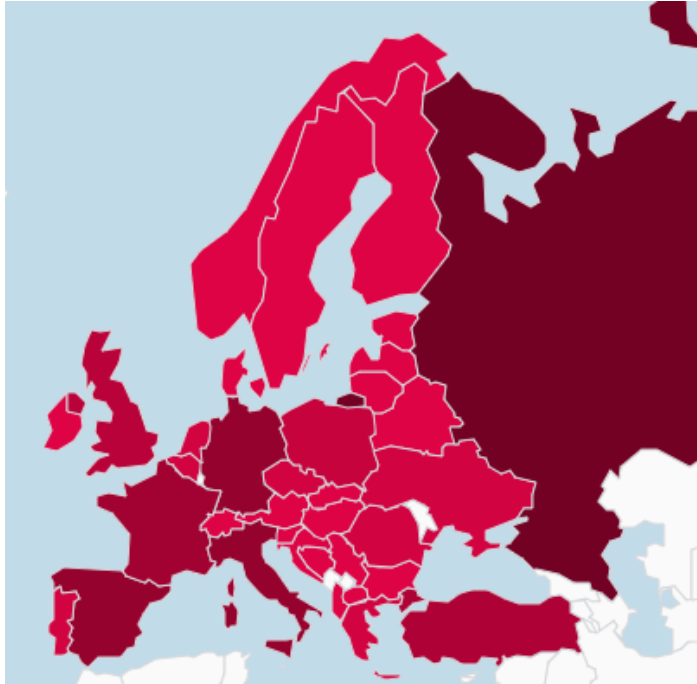


USE CASES AFTER SALES ACCESS

Purpose	Use case	Modules
Prospecting	Detection of potential new sales partners. Easy to find the car parts distributors per country and to sort and filter by size of turnover. Identifying the members of international or national trade groups per country.	Distributors overview / Trade and buying groups
Key accounting	Stay up to date of the latest mergers, acquisitions and changes among the ITGs. Having always an overview on the latest situation of the large distributors with all their subsidiaries in the different countries. Be always on the latest situation regarding the international and national trade groups. Which distributor is member of an ITG and who has changed the membership?	Distributors overview / Trade and buying groups
Market shares	Identify the existing sales partners and estimate the own share. Clients are measuring their sales development with a specific distributor against the development of the distributors total turnover. In case the rates are above or below a treshold, more research and action is required to find the reasons.	Distributors overview / Trade and buying groups
Neutral perspective	Some clients need a neutral 3rd party view of the markets to discuss the achievable potential in specific markets.	Distributors overview / Trade and buying groups Aftermarket Volumes
Sales coverage	Knowing about the geographical coverage of sales partners. Knowing about the garage marketing systems that different market participants are operating.	Distributors overview / Trade and buying groups Garage concepts
Market potential	Calculating the market potential for product category level.	Aftermarket Volumes Vehicles in operation
Customer´s Customers	Knowing about the garages which is the central place of parts demand and parts replacement. To understand the total number by types and how tehy are connected to other market participants.	Garage structures Garage concepts

Purpose	Use case	Modules
Prospecting	Find the most important E-Commerce players per country. Identify the largest sellers on eBay for specific product categories or brands.	E-Commerce player ebay insights
Webshop mapping	Easy to lookup for understanding which webshop belongs to which company and if they have any connection to other companies or ITG's	E-Commerce player
Market shares	Identify the shares of the single E-Commerce players per country by measuring the user traffic.	E-Commerce player
Market share on ebay	Lookup of total sales of sellers, product categories or brands. Understanding the market share of single sellers or brands on the ebay marketplace.	Ebay insights
Competition analysis	Understanding which brands performing the best in specific product categories and who are the sellers behind.	Ebay insights
Pricing analysis	Tracking the price levels and development of single products or categories on EAN number level.	Ebay insights
Product information management	Identifying sellers that do not use proper product information or labeling. Helping them to improve the listing of articles.	

Product	Format	Price
<u>Car Aftermarket Structure in Europe Poster</u>	Din A 0 Poster	95,- EUR +40,- EUR pdf
<u>Car Aftermarket Structure in Germany Poster</u>	Din A 0 Poster	95,- EUR +40,- EUR pdf
<u>Who is Who in Europe Poster</u>	Din A 0 Poster	95,- EUR +40,- EUR pdf
<u>Who is Who in Germany Poster</u>	Din A 0 Poster	95,- EUR +40,- EUR pdf
<u>Car Aftermarket in Europe Report</u>	PDF Report	1.750,- EUR
<u>After sales ACCESS Database single country</u>	Database access 1 year subscription	2.509,- EUR
After sales ACCESS Database 10 countries	Database access 1 year subscription	On request
After sales ACCESS Database Europe	Database access 1 year subscription	On request
After sales ACCESS Database Europe + ITG worldwide	Database access 1 year subscription	On request
<u>E-Commerce Insights</u>	Database access 1 year subscription	5.995,- EUR



Type of garage

- Authorized car service / dealer
- Independent car service
- Authorized truck service / dealer
- Independent truck service
- Tyre service
- Body and paint shops
- Auto glass service
- Auto center
- Fast Fit

Type on contract

- Vehicle manufacturer network (e.g. BMW dealer)
- Parts manufacturer network (e.g. Bosch car service, Euromaster/Michelin)
- Garage chains (e.g. Norauto, Mekonomen, Midas)
- Garage systems/concepts from distributors or trade and buying groups (e.g. 1a Autoservice, Garage AD Expert)

Attributes

- Name of garage
- Address (Street, Postal Code, City)
- Phone
- Geo coordinates
- Type of garage
- Type of concept
- Email (partly and no person related)
- Web address (partly)



Make smart decisions with our geo-marketing tool

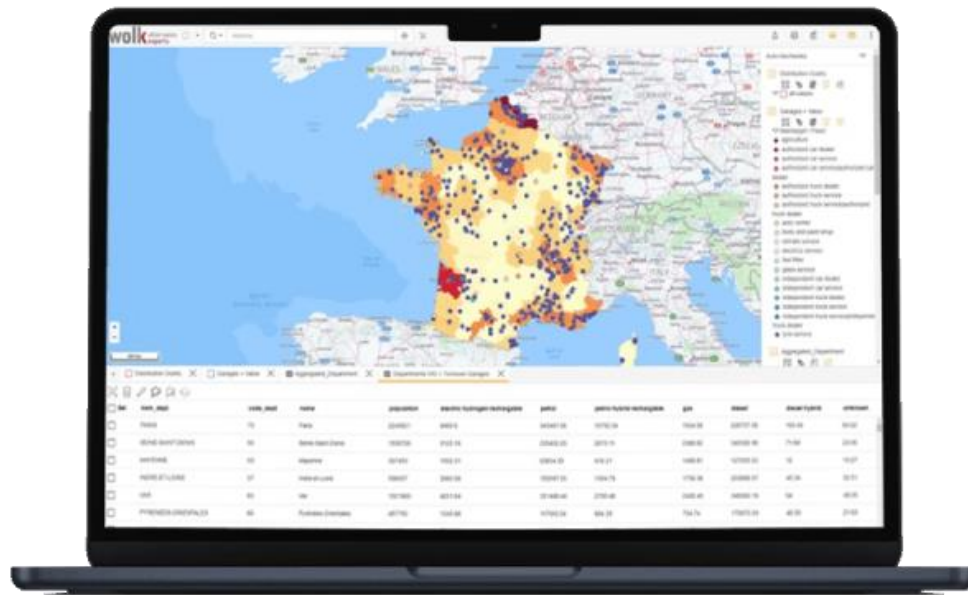
The Geo-marketing tool visualizes the address datasets from our different databases.

We show:

- All available garages by type and affiliation
- The single outlets of the car parts distributors with affiliation

Further, we can add any custom datasets such as:

- User-ratings on garages or distribution branches
- Vehicles in operation on Zip code level
- Population or purchasing power
- Customers dataset
- Etc...



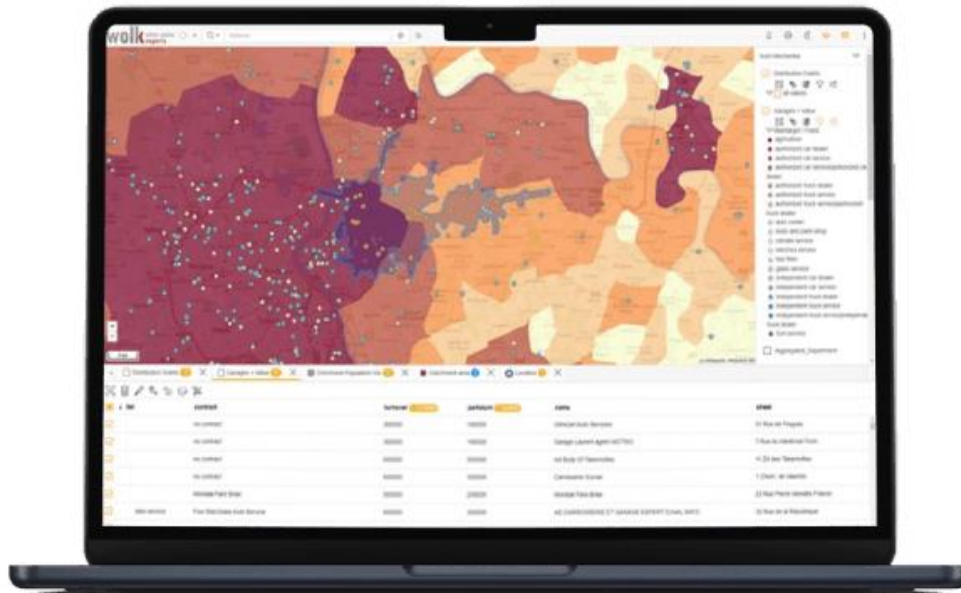
NETWORK ANALYSIS

Analyze your network and identify white spots

Identify your existing network and analyze the coverage by specific catchment areas which you can set by driving kilometers or driving time from your locations.

Identify potential partners in your white spots by having all different garage types on the map.

Additional regional data like vehicles in operations, population, or aftermarket potential by garage turnover can help you to identify the high potential regions.

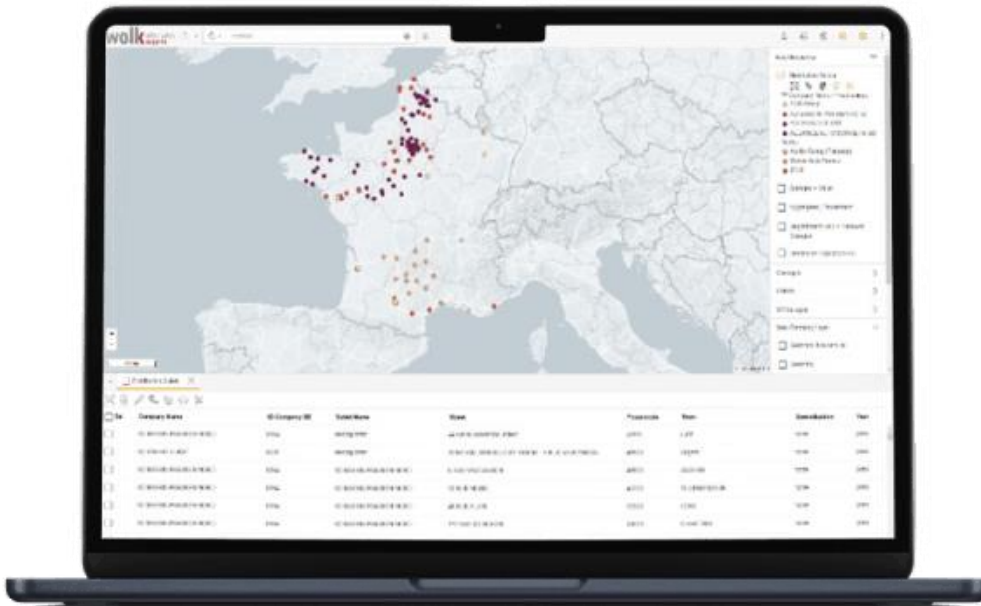


POTENTIAL ANALYSIS

Potential analysis for parts distribution

Analyze the potential of single outlets based on the regional vehicles in operations data and the total parts turnover potential based on the garages in your catchment area.

Quickly identify your competition in your catchment area.



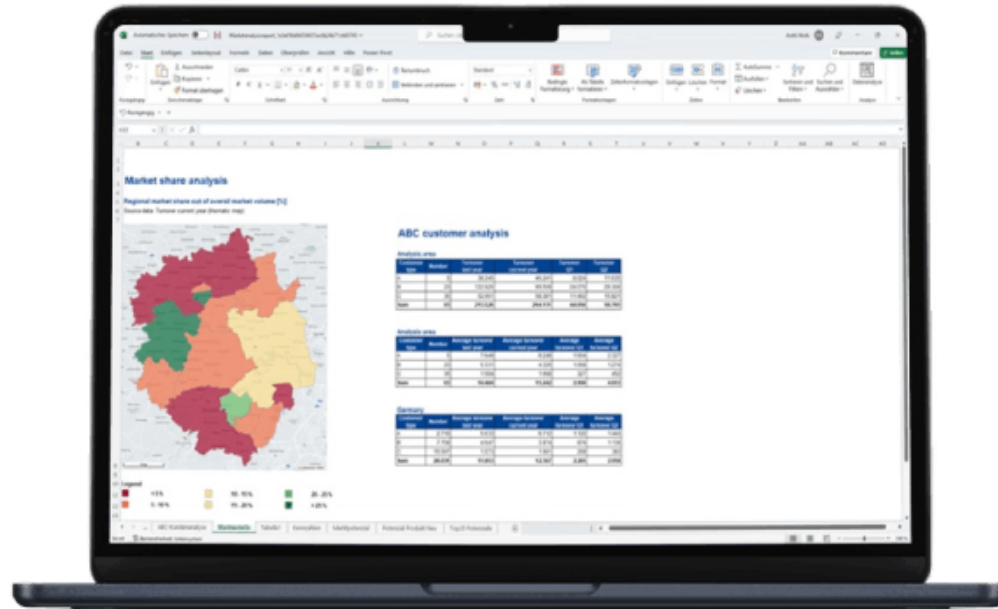
DISTRIBUTION OVERVIEW

What is the distributor's network coverage?

Analyze the coverage of your distribution partners. Quickly find out which areas are covered by their sales outlets.

By identifying the catchment area of a distributor's network, you can quickly analyze the number of garages and the potential of the total parts they can cover.

All distributors are added with information on their affiliation to the national and international trade and buying groups.



SALES STEERING

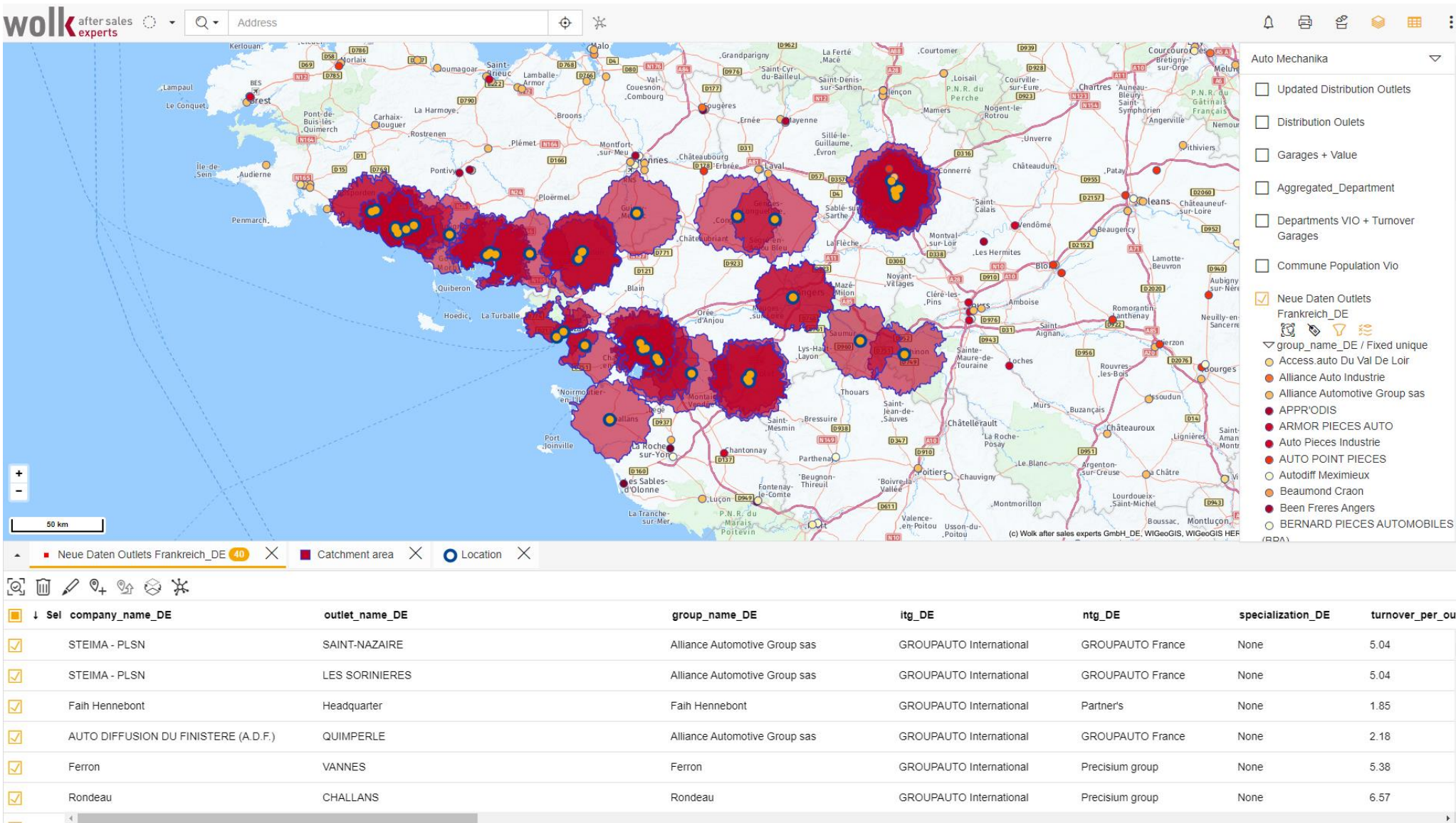
Sales steering with smart target agreements

Assign your sales representatives to specific regions and point out the total potential and locations of customers.

Identify realistic sales targets based on the total potential within the sales representative's area.

Create an individual reporting of market share analysis, customer analysis, and market potential.

GEO MARKETING TOOL – USE CASE DISTRIBUTION COVERAGE



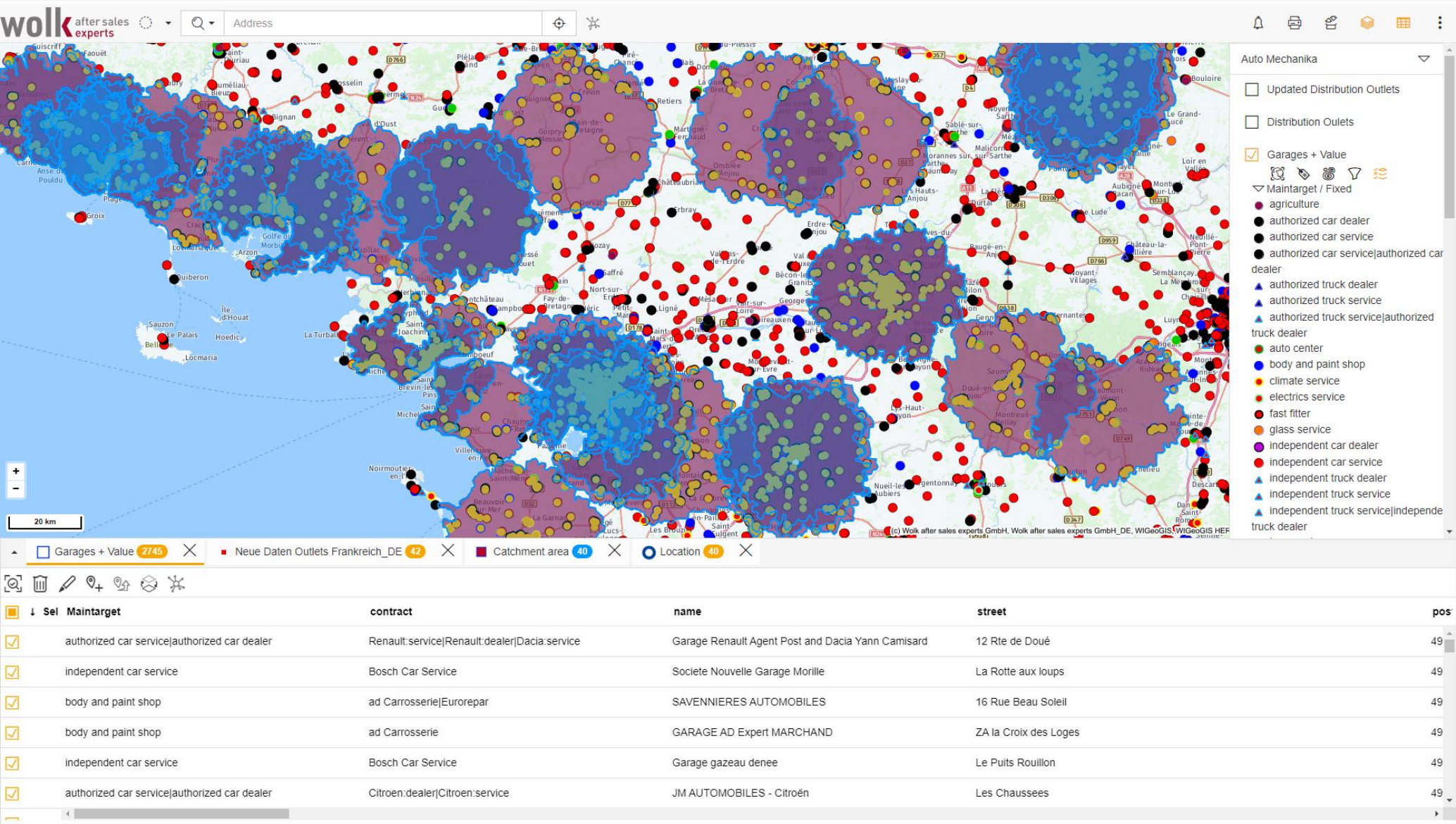
Distribution Coverage

In this example we have selected all Distributor's outlets that belong to the International trade any buying group of Group Auto.

The Distributor's are marked with a yellow dot. The red surrounding is their catchment area based on 25km driving distance.

We already can identify white spots.

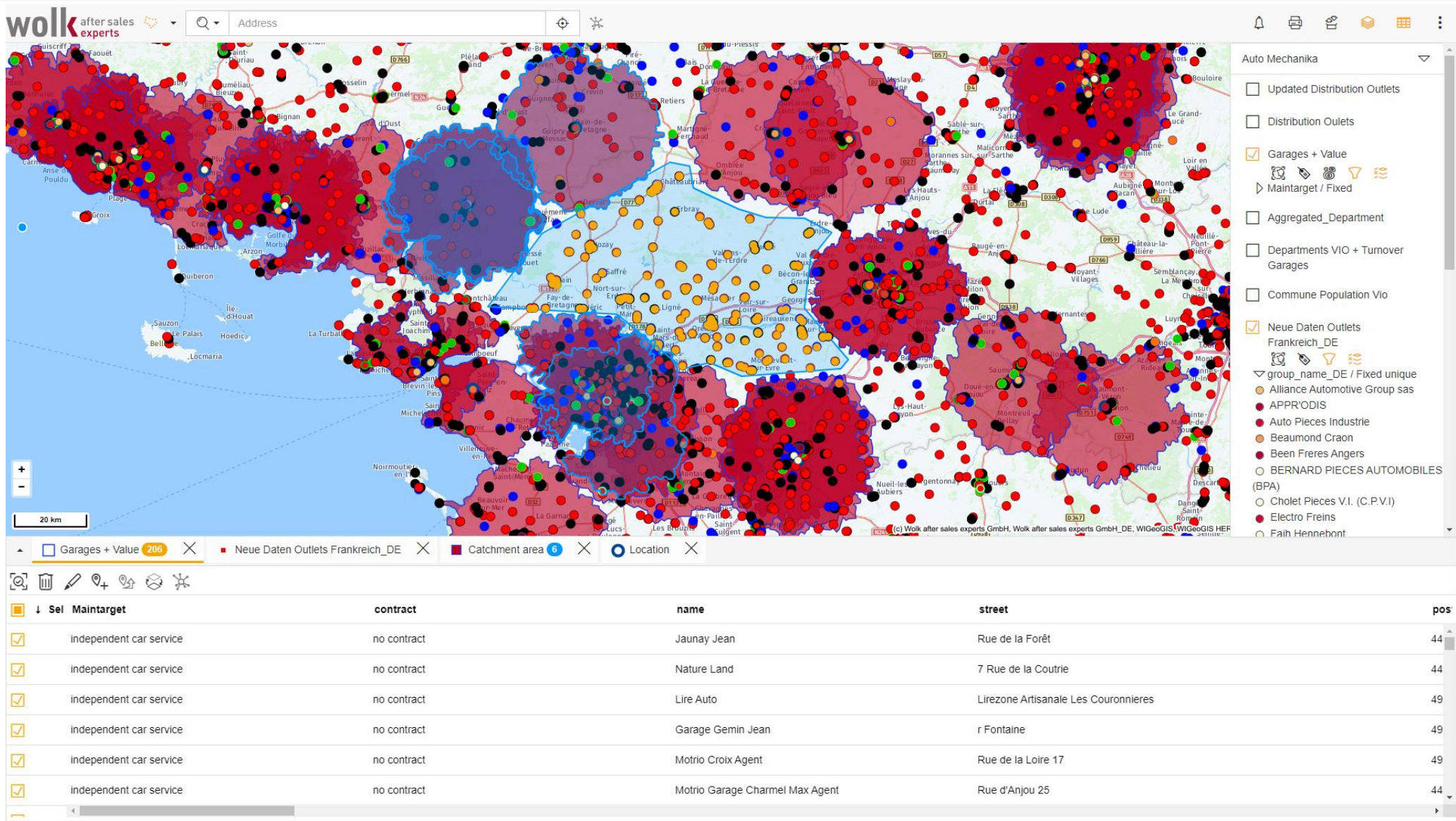
GEO MARKETING TOOL – USE CASE DISTRIBUTION COVERAGE



Distribution Coverage

In the next step, we add another layer with the locations of all available car servicing stations.

We can identify the total number of garages that are located within the catchment areas of the selected distributor's branches.



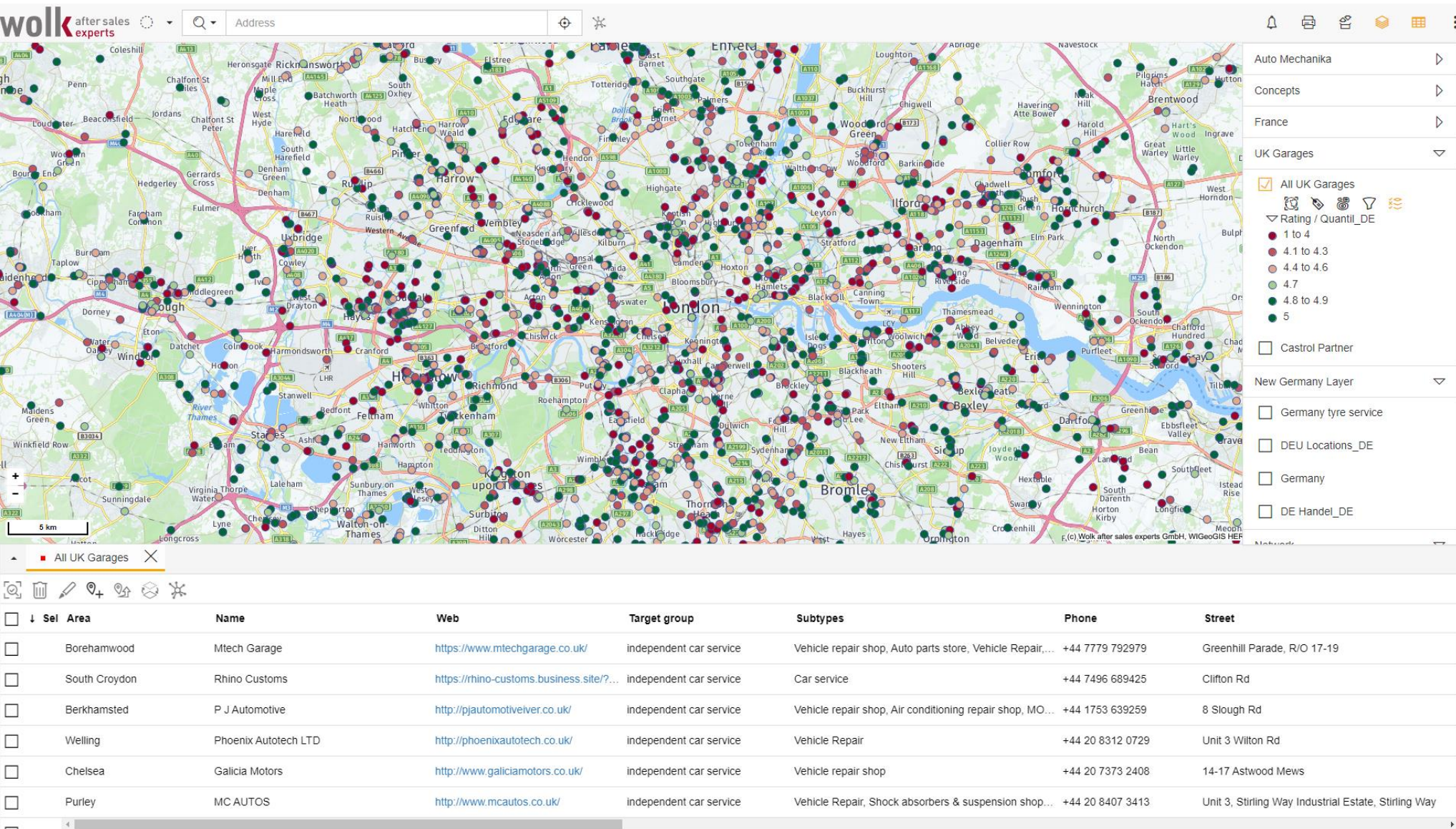
Distribution Coverage

In the next step, we can select the garages that are not covered.

And we can have a look which other distributor´s branches are covering this area.

In a similar way, it is possible to identify white spots for the own network.

GEO MARKETING TOOL – GARAGES BY RATING



Garages with enriched information

In this case the workshop's addresses are enriched with information on the user's rating from Google maps.

It is possible to identify good rated garages from lower ratings by visualization and filtering.

Any further data that is publicly available could be added.



Automotive Aftermarket Insights

We conduct exclusive market research with a wide range of different methods and long term experience in the area of automotive aftermarket worldwide.

Market Potential

- Total market potential
- Market share by brand
- Competitors insights
- Replacement rates
- Distribution channels
- Channel strategy

Market Insights

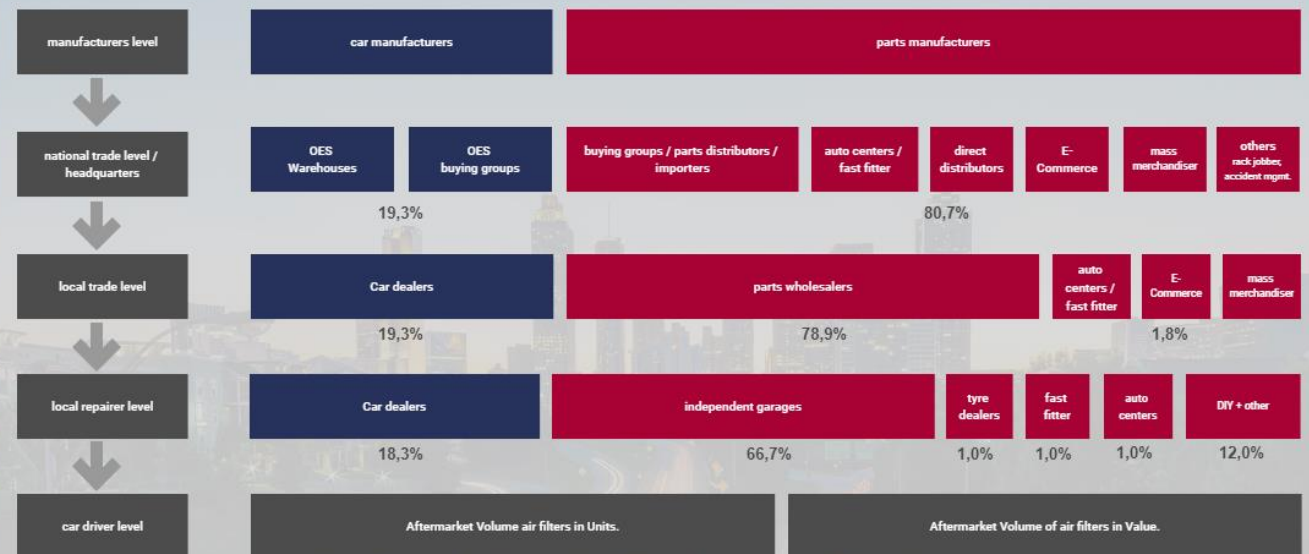
Market Size

Case: Distribution flow and channel management

A leading aftermarket air filters manufacturer wanted to improve its supply chain strategy and needed insights on the whole distribution flow of air filters in the independent as well in the authorized channels. The shares and margins per channel gave valuable insights on their positioning in the market.



Air Filter Distribution flow



Brand positioning

- Brand awareness
- Brand reputation & image
- Net promotor score
- Purchasing behaviour



Market Insights

Brand Research

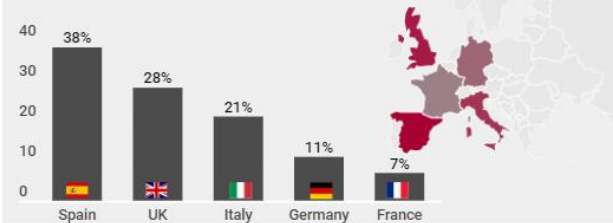
Brand related purchasing behaviour

For re-targeting the future marketing activities a client needed to get detailed insights on the sales situation in reflection to brands (genuine vs. non-genuine vs. private label).
The research was conducted with distributors and garages to understand the purchasing behavior and the portfolio strategy of both parties.

Share of private label brands among distributors smaller

20Mio€ turnover (no real data)

Percentage of turnover with private label brands over all product categories



1.600
interviews

300 interviews in each country, 200 among IAM, 100 OES garages, and 20 parts distributors



5
countries

Germany, Spain, France, Italy & UK



120
charts

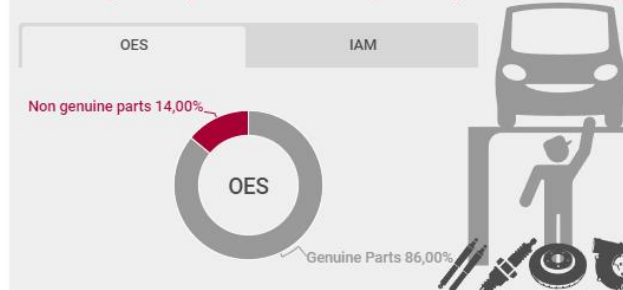
have been delivered in the final presentation



8
weeks

from kick-off to final presentation

Share of genuine parts towards non-genuine parts in workshops

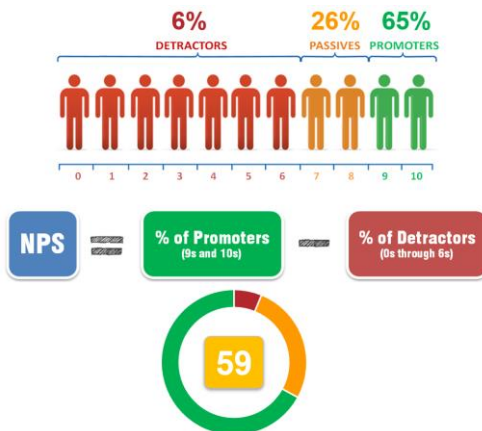


If the brand I mainly order is not available, I usually

Order behaviour



I call another Distributor to get the same brand
I will order another brand from the Distributor
I don't have any general procedure



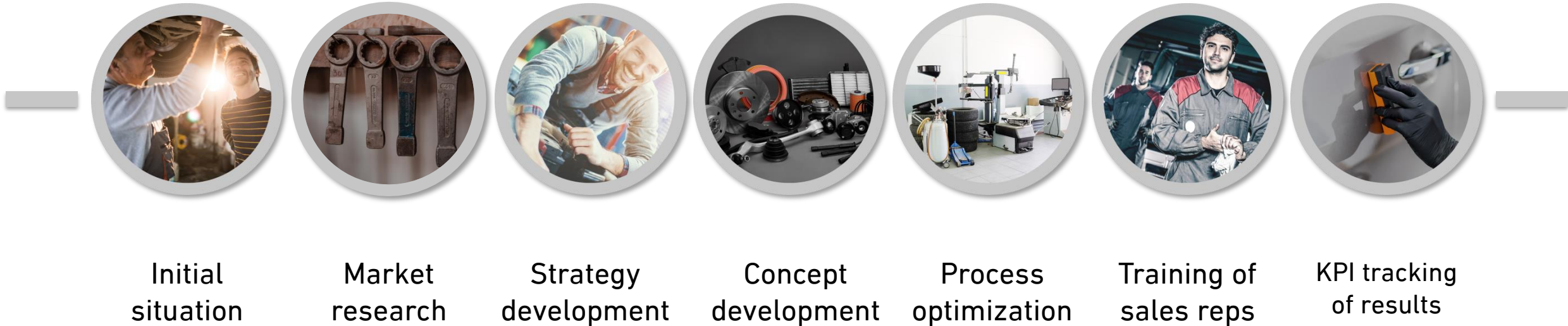


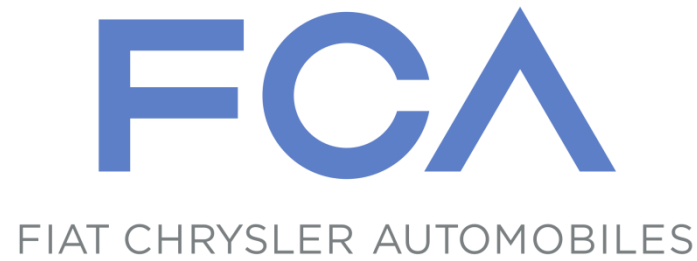
A photograph of a line of cars in traffic, viewed from the front-left. The cars are mostly white and silver, stretching into the distance. The scene is bathed in a warm, orange glow from the setting or rising sun, which is visible as a bright light source in the upper right corner. The background shows a city street with buildings and traffic lights, all slightly blurred.

From Research to Results

Based on Data and Insights we assist in building strategies and help ti implement concepts.

Sales of OE-parts to independent repairers





Mercedes-Benz



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