

IAM OES

Study

The shopping behaviour of German
garages in the tension field
between IAM + OES
incl. settings, acceptance, and evaluation of the
parts wholesalers

Imprint

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TABLE OF CONTENTS

1. Definitions and abbreviations used.....	8
2. Summary of results	9
3. Introduction	15
4. Study design and characterization of the garages participating	18
4.1 Study design	18
4.2 Garage systems	20
4.3 Contractors and most frequently repaired brands	22
4.4 Regional distribution	24
4.5 Employment structure	25
4.6 Garage cycles	27
5. Sales generation in the garages.....	29
5.1 Annual sales achieved	30
5.2 Development of annual sales.....	33
5.3 Sales prediction for the future	35
5.4 Sales generated by field of activity.....	37
5.4.1 Repair of wear parts vs. inspection work.....	38
5.4.2 Repair of wear parts.....	39
5.4.3 Inspection and maintenance work	39
5.4.4 Body and paint work.....	40
5.4.5 Tyre and rim work.....	42
5.4.6 Work on electrics/electronics, air conditioning & heating/cooling	43
5.4.7 Engine repairs/replacement.....	44
5.4.8 Glass work.....	45
5.4.9 Tuning and accessories work	46
5.5 Absolute sales in the fields of activity.....	47
5.6 Material/wage ratio in the following fields of activity	50
5.7 Wage share of diagnostics & calibration	52
5.8 Absolute sales volume of material/wage and diagnostics & calibration	54
5.9 Challenges regarding the qualification of staff and garage equipment	58
6. Analysis of the purchasing structure.....	65
6.1 Factors influencing the purchasing decision	65
6.2 Overall ratio of oe to iam spare parts in purchasing	71
6.3 Overall ratio of oe to iam spare parts by product groups.....	74
6.4 Proportion of B2C online shops in purchasing	78

6.5 Overall ratio of oe to iam spare parts purchased through B2C online stores.....	81
6.6 Electronic parts catalogues used.....	85
7. Most important parts dealers of the garages surveyed	90
7.1 Genuine spare parts dealers	90
7.1.1 Most important genuine spare parts dealers of the authorised garages.....	90
7.1.2 Most important genuine spare parts dealers of the independent garages.....	91
7.1.3 Number of genuine spare parts dealers	94
7.2 Dealers of independent market spare parts	97
7.2.1 Most important independent parts wholesalers of the authorised garages	97
7.2.2 Most important independent parts wholesalers of the independent garages	99
7.2.3 Number of the independent parts wholesalers	100
8. Ratings of the parts wholesalers.....	103
8.1 Ratings of the independent parts wholesalers.....	103
8.1.1 Ratings of the independent parts wholesalers from the perspective of the authorised garages.....	103
8.1.2 Ratings of the independent parts wholesalers from the perspective of the independent garages.....	107
8.1.3 Aspects that recently have caused the greatest dissatisfaction when purchasing iam spare parts ..	110
8.2 Ratings of parts wholesalers of genuine spare parts	113
8.2.1 Ratings of the parts wholesalers of genuine spare parts (within the company’s own service network) from the perspective of the authorised garages	113
8.2.2 Aspects that have recently caused the greatest dissatisfaction from the perspective of the authorised garages when purchasing genuine spare parts	116
8.2.3 Ratings of parts wholesalers of genuine spare parts (outside the company’s own service network) from the perspective of the authorised garages	118
8.2.4 Ratings of the parts wholesalers of oe parts from the perspective of the independent garages.....	122
8.2.5 Aspects that have recently caused the greatest dissatisfaction from the perspective of the independent garages when purchasing genuine spare parts.....	125
8.3 OE parts wholesalers vs. IAM parts wholesalers – final comparison and conclusion	127
8.4 Aftersales award 2017	129
9. Further analyses/studies around iam and oes	130
10. Outlook for future market research activities	137

TABLE OF FIGURES

Figure 1: Garages participating in the survey 19

Figure 2: Garage systems of the authorised garages surveyed..... 20

Figure 3: Garage systems of the independent garages surveyed..... 21

Figure 4: Contract partners of the authorised garages surveyed 22

Figure 5: Contract partners of the authorised garages surveyed – premium vs. Volume brands 23

Figure 6: Brands most frequently repaired by independent garages 23

Figure 7: Regional distribution of the garages surveyed..... 24

Figure 8: Number of garage employees in authorised garages 26

Figure 9: Number of garage employees in independent garages 26

Figure 10: Number of garage cycles in authorised garages 28

Figure 11: Number of garage cycles in independent garages 28

Figure 12: Garage sales (material + service) 2015 in authorised garages 31

Figure 13: Garage sales (material + service) 2015 in independent garages 32

Figure 14: Garage sales trends (material + service) from 2014 to 2015 in authorised garages 34

Figure 15: Garage sales trends (material + service) from 2014 to 2015 in independent garages 34

Figure 16: Agreement to the statement: “Employing qualified staff for electronic diagnostics and calibration on a permanent basis is too expensive.” – by garage type 58

Figure 17: Agreement to the statement: “Employing qualified staff for electronic diagnostics and calibration on a permanent basis is too expensive.” In authorised garages by vehicle brand..... 59

Figure 18: Agreement to the statement: “Employing qualified staff for electronic diagnostics and calibration on a permanent basis is too expensive.” In independent garages by system affiliation . 59

Figure 19: Agreement to the statement: “The latest garage equipment is too expensive to purchase” – by garage type 61

Figure 20: Agreement to the statement: “The latest garage equipment is too expensive to purchase” in independent garages by system affiliation..... 62

Figure 21: Agreement to the statement: “If we lack the latest equipment, we buy it at a special offer or later when it becomes cheaper.” – by garage type. 63

Figure 22: Agreement to the statement: “If we lack the latest equipment, we buy it at a special offer or later when it becomes cheaper.” In authorised garages by vehicle brand. 64

Figure 23: Confirmation to the statement: “If we lack the latest equipment, we buy it at a special offer or later when it becomes cheaper” in independent garages by system affiliation. 64

Figure 24: Most important factors for authorised garages when purchasing car parts..... 66

Figure 25: Most important factors for independent garages when purchasing car parts..... 67

Figure 26: Most important factors for authorised garages of a premium brand when purchasing car parts ... 68

Figure 27: Most important factors for authorised garages of volume brands when purchasing car parts 68

Figure 28: Most important factors for independent garages with a garage system when purchasing car parts 69

Figure 29: Most important factors for independent garages without a garage system when purchasing car parts 70

Figure 30: Proportion of genuine spare parts* in the purchase of car parts (excluding tyres) in authorised garages 72

Figure 31: Proportion of genuine spare parts* when purchasing car parts (excluding tyres) in independent garages 73

Figure 32: Proportion of genuine spare parts* purchased by authorised garages – by product group..... 75

Figure 33: Proportion of genuine spare parts* purchased by authorised garages of a premium brand – by product group 75

Figure 34: Proportion of genuine spare parts* purchased by authorised garages of volume brands – by product group 76

Figure 35: Proportion of genuine spare parts* purchased by independent garages – by product group..... 76

Figure 36: Proportion of genuine spare parts* purchased by independent garages with a garage system – by product group 77

Figure 37: Proportion of genuine spare parts* purchased by independent garages without a garage system – by product group 77

Figure 38: Proportion of car spare parts (excluding tyres) purchased by authorised garages via B2C online portals/shops 79

Figure 39: Proportion of spare parts (excluding tyres) purchased by independent garages via B2C online portals/shops 80

Figure 40: Ratio of genuine spare parts* to spare parts from the independent market (excluding tyres) purchased by independent garages via B2C online shops..... 81

Figure 41: Ratio of genuine spare parts to spare parts from the independent market (excluding tyres) purchased by authorised garages via B2C online shops..... 82

Figure 42: Proportion of genuine spare parts* purchased via B2C online portals/shops in authorised garages 83

Figure 43: Proportion of genuine spare parts* purchased via B2C online portals/shops in independent garages 84

Figure 44: Electronic parts catalogues used by authorised garages 85

Figure 45: Electronic parts catalogues used by authorised garages of a premium brand 86

Figure 46: Electronic parts catalogues used by authorised garages of volume brands 87

Figure 47: Electronic parts catalogues used by independent garages 87

Figure 48: Electronic parts catalogues used by independent garages without a garage system 88

Figure 49: Electronic parts catalogues used by independent garages with a garage system 89

Figure 50: Main supplier of genuine spare parts* from the perspective of the authorised garages 91

Figure 51: Main supplier of genuine spare parts* from the perspective of the independent garages 92

Figure 52: Most important supplier of genuine spare parts* from the perspective of the independent garages with a garage system 93

Figure 53: Most important supplier of genuine spare parts* from the perspective of the independent garages without a garage system 93

Figure 54: Number of genuine spare parts dealers* in authorised garages by vehicle brand 95

Figure 55: Number of genuine spare parts dealers* in independent garages 96

Figure 56: Most important parts wholesalers on the independent market from the perspective of the authorised garages – aggregated 98

Figure 57: Most important dealers of independent market spare parts from the perspective of the independent garages 99

Figure 58: Most important parts wholesalers on the independent market from the perspective of the independent garages – aggregated 100

Figure 59: Number of parts wholesalers of spare parts from the independent market for authorised garages 102

Figure 60: Number of parts wholesalers of independent market spare parts for independent garages 102

Figure 61: Ratings of the most important spare parts wholesaler of independent market spare parts from the perspective of the authorised garages 105

Figure 62: Ratings of the most important parts wholesaler of independent market spare parts from the perspective of the authorised garages of a premium brand 106

Figure 63: Ratings of the most important spare parts wholesaler of independent market spare parts from the perspective of the authorised garages of volume brands 106

Figure 64: Ratings of the most important spare parts wholesaler of independent market spare parts from the perspective of the independent garages 108

Figure 65: Ratings of the most important trader of independent market spare parts from the perspective of the independent garages with a garage system 109

Figure 66: Ratings of the most important trader of independent market spare parts from the perspective of the independent garages without a garage system 109

Figure 67: Aspects that have recently caused dissatisfaction when purchasing IAM spare parts 110

Figure 68: Aspects that have recently caused dissatisfaction in authorised garages when purchasing IAM spare parts 111

Figure 69: Aspects that have recently caused dissatisfaction in independent garages when purchasing IAM spare parts 112

Figure 70: Ratings of the most important parts wholesalers of genuine spare parts* (within the company's own service network) from the perspective of the authorised garages 114

Figure 71: Ratings of the most important traders of genuine spare parts* (within the company's own service network) from the perspective of the authorised garages of a premium brand 115

Figure 72: Ratings of the most important trader of genuine spare parts* (within the company's own service network) from the perspective of the authorised garages of volume brands 116

Figure 73: Aspects that have recently caused the greatest dissatisfaction in authorised garages when purchasing genuine spare parts* 117

Figure 74: Aspects that have recently caused the greatest dissatisfaction when purchasing genuine spare parts* – in authorised garages by vehicle brand 118

Figure 75: Ratings of the most important parts wholesaler of genuine spare parts* (outside the company's own service network) from the perspective of the authorised garages 120

Figure 76: Ratings of the most important parts wholesaler of genuine spare parts* (outside the company's own service network) from the perspective of the authorised garages of a premium brand 120

Figure 77: Ratings of the most important parts wholesaler of genuine spare parts* (outside the company's own service network) from the perspective of the authorised garages of volume brands 121

Figure 78: Ratings of the most important parts wholesaler of genuine spare parts* from the perspective of the independent garages 123

Figure 79: Ratings of the most important parts wholesaler of genuine spare parts* from the perspective of the independent garages without a garage system 124

Figure 80: Ratings of the most important parts wholesaler of genuine spare parts* from the perspective of the independent garages with a garage system..... 124

Figure 81: Aspects that have recently caused dissatisfaction in independent garages when purchasing genuine spare parts* 125

Figure 82: Aspects that have recently caused the greatest dissatisfaction when purchasing genuine spare parts* – independent garages and authorised garages in comparison..... 126

Figure 83: Aspects that have recently caused the greatest dissatisfaction when purchasing genuine spare parts* – independent garages in comparison 126

LIST OF TABLES

Table 1: Number of average garage employees 25

Table 2: Number of average garage cycles per day 27

Table 3: Average garage sales (material + service) in 2015..... 30

Table 4: Average trend of garage sales (mat. + service) from 2014 to 2015 33

Table 5: Predicted sales trend (material and wages) from 2016 to 2020 36

Table 6: Average proportion of sales (material + service) for the following garage activities 37

Table 7: Average ratio of sales (material + service) with the repair of wear parts to inspection work 38

Table 8: Breakdown of sales (material + service) including wear parts (excluding inspection work)..... 39

Table 9: Breakdown of sales (material + service) including inspection work (excluding repair of wear parts)..... 40

Table 10: Breakdown of sales (material + service) by body and paint work..... 41

Table 11: Breakdown of sales (material + service) including work on “tyres” or “rims” 42

Table 12: Breakdown of sales (material + service) including work on electrical/electronics, air conditioning & heating/cooling 43

Table 13: Breakdown of sales (material + service) including engine repairs/replacements 44

Table 14: Breakdown of sales (material + service) with glass work 45

Table 15: Breakdown of sales (material + service) with work on tuning and accessories..... 46

Table 16: Absolute sales (material + service) in the fields of activity in authorised garages 48

Table 17: Absolute sales (material + service) in the fields of activity in authorised garages Ratio of material and wages in the fields of activity 49

Table 18: Average proportion of material in total sales in the respective activities 50

Table 19: Average proportion of “diagnostics and calibration” in total wages in the respective activities 52

Table 20: Absolute sales volume of material/wage and diagnostics & calibration in authorised garages 55

Table 21: Absolute sales volume of material/wage and diagnostics & calibration in independent garages 56

Table 22: Number of training days in 2015 that were attended or had to be cancelled 60

Table 23: Most important factors for garages in purchasing* 65

Table 24: Average ratio of genuine spare parts* to spare parts from the independent market (excluding tyres) 71

Table 25: Average proportion of genuine spare parts* purchased – by product group 74

Table 26: Average proportion of car spare parts (excluding tyres) purchased via B2C online portals/shops .. 78

Table 27: Average ratio of genuine spare parts* to spare parts from the independent market (excluding tyres) when purchasing via B2C online portals/shops..... 83

Table 28: Electronic parts catalogues used by independent garages with a garage system 89

Table 29: Average number of dealers of genuine spare parts*..... 94

Table 30: Most important dealers of independent market spare parts from the perspective of the garages surveyed 97

Table 31: Average number of parts wholesalers of spare parts from the independent market 101

Table 32: Ratings of the most important spare parts wholesaler for spare parts from the independent market – comparison of average ratings* 104

Table 33: Ratings** of the most important parts wholesaler of genuine spare parts* (within the company’s own service network) from the perspective of the authorised garages 114

Table 34: Ratings** of the most important parts wholesaler of genuine spare parts* (outside the company’s own service network) from the perspective of the authorised garages 119

Table 35: Ratings** of the most important parts wholesaler of genuine spare parts* – independent garages and authorised garages (within the company’s own service network) in comparison 122

Table 36: Ratings** of the most important parts wholesaler of genuine spare parts* – independent garages and authorised garages (outside the company’s own service network) in comparison 123

Table 37: Ratings** of the independent parts wholesalers by independent garages vs. rating of genuine spare parts wholesalers* by authorised garages 127

3. INTRODUCTION

The market for car repairs and service in Germany has been influenced and shaped by a variety of factors in recent years. This includes for example the increasing complexity of vehicles, ongoing digitisation, e-mobility and changes at the dealer level.

In the past, there have been several structural changes at the level of parts wholesalers. On the one hand, this includes the fact that in recent years, a number of takeovers and mergers have changed the landscape of the independent spare parts market. The takeovers of PV by Stahlgruber, Trost by WM and Coler, Busch & Büge by AAG/GPC as well as a number of other takeovers/mergers of medium-sized and small traders, such as e.g. Jakobs and Schwenker by Hess, have had a strong influence on the dealer landscape in Germany and Europe in recent years.¹ Some garages are facing the situation that their preferred dealer, where ordering parts has become a standard over the years, no longer exists now.

But that's not all. On the other hand, fundamental changes at the level of OES parts wholesalers from vehicle manufacturers' networks are also well underway. Names such as EFA Autoteile by Emil Frey, Dello, Bleker, OTS, OT-Regio etc. stand for this. In recent years, there has been an increasing interweaving of the independent spare parts market (IAM) and the market for spare parts provided by vehicle manufacturers (OES). Car manufacturers, such as the VW group, PSA, Renault, FCA, BMW etc., have discovered the independent spare parts market as a lucrative market for themselves and are about to gain a foothold there. A particular focus of the study is on the purchasing behaviour of garages as well as the use of OE vs. IAM parts

In addition to the independent spare parts market, independent garages have for many years now also purchased OE parts from vehicle manufacturers' networks. This was due to the lack of availability of some parts such as switches (captive parts), the higher fitting accuracy of body parts or implicit support in the field of diagnostics or even in the form of borrowed tools. In the past, the classic route via the neighbouring car dealership had been used exclusively. Today, an alternative is purchasing via the (preferred) independent parts wholesaler – at least if it has included spare part of the vehicle manufacturer in its repertoire – which is now at least occasionally the case, for example, with Coler, Knoll or Schäfer-Barthold. There are also multi-brand dealers such as EFA Autoteilewelt and Dello.

¹For more information, see Sergeychik (2017): Consolidation Process in the European Aftermarket 2012-2017.

In times of digitalisation, it is not surprising that it is also possible to obtain spare parts with the car manufacturer's stamp via the Internet, e.g. via ALFAH. All in all, this means a number of purchasing options, resulting in a highly competitive field.

However, not only independent garages buy spare parts bearing the vehicle manufacturers' stamp, authorised garages have also recognised that it can make sense to offer their customers spare parts from the independent market. However, they do not obtain IAM parts from their contract partners but from independent parts wholesalers – whether offline or via an online shop.

The structural changes described above provide sufficient reasons to focus on the market for automotive repairs and car service – in particular the purchasing behaviour regarding OE and IAM parts. The aim of this series of studies is to provide a comprehensive picture of the situation of garages in Germany. The present study however concentrates on IAM mechanics garages and OES authorised garages. A study conducted in parallel analyses the market of independent body and paint shops.²

At the beginning of the primary study, the study design is presented in Chapter 0 as well as demographic data of the participating garages, e.g. the regional distribution or the number of productive employees.

Chapter 0 then provides a detailed insight into the sales generation of mechanics garages in Germany. This includes, on the one hand, the sales generated by garages and how these have developed. On the other hand, the sales generated are broken down into fields of activity – down to individual product fields. In addition, the proportion of the wage or material in the respective activities was determined.

The focus of the investigation is on the relationship between garages and their parts wholesalers. This study provides an answer to the question of where the mechanics garages surveyed obtain their spare parts and to what extent IAM and OE spare parts have already been interlinked. We also show to what extent garages are already using the Internet to cover their spare parts needs. In addition, we determine the factors that have a decisive influence on the purchasing behaviour of mechanics garages (see Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**).

²Lamsfuß (2017): Das Einkaufsverhalten von Karo-/ Lackwerkstätten im Spannungsfeld zwischen IAM & OE; inkl. Einstellungen, Akzeptanz und Bewertung der Teilegroßhändler.

Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** then goes on to show from which and how many dealers the garages surveyed order their spare parts and how they rate these dealers – both regarding spare parts from the independent market and regarding genuine spare parts (with the car manufacturer’s stamp) – as a whole (see Chapter 0). In addition, we also address the problems that currently exist with purchasing spare parts. The chapter concludes with the introduction of those parts wholesalers that have received the best ratings from garages (see Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**)³

Finally, we briefly present further studies and reports on the European aftermarket in Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**, before Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** presents further optional options for evaluating the available data from the garage survey, and we also present further research activities planned for the future in the field of car garages.

³The winners were presented with an award at this year’s “Aftermarket Forum 2017” by Wolk after sales experts. See also <http://www.wolk-aftersales.com/news-zu-wolk-after-sales-experts/ein-forum-fuer-die-ganze-automobilbranche.html>.

STUDY DESIGN AND CHARACTERIZATION OF THE GARAGES PARTICIPATING

Before the thematic content is introduced in Chapter 0, a brief introduction to the study design and a description of the garages taking part in the survey are given here in Chapter 0.

STUDY DESIGN

In principle, various garage types are active on the market for car garages. There are currently 17,000 active service garages of the car manufacturers in Germany. In addition, there is the independent market with currently around 32,000 garages.⁴ However, garages often have different focus areas. For example, the independent market for spare parts is again divided into garages specialising in mechanics, tyres, bodywork & paint, glass, etc..

This heterogeneity makes it necessary to examine the market for car repairs differentiated by garage type. Accordingly, the study series was divided into several analyses. The first part examines the market situation of the authorised garages (service partners of car manufacturers) and the independent mechanics garages. The parallel survey of 120 independent body and paint shops in Germany on the same topic will soon be published.⁵

About 17,000 authorised garages and 19,000 independent mechanics garages are currently active in Germany. In the period from 14.11.2016 to 10.01.2017, about 900 garages of this population were interviewed by telephone.

About 55 % of the approximately 900 participating garages were independent mechanics garages and 45 % were authorised garages, the ratio of independent garages to authorised garages corresponding to the garage structure in Germany.⁶ Since this sample was also quoted in terms of its affiliation to a garage system or to the contract partners of the authorised garages, this analysis qualifies as representative.

⁴See Wolk after sales experts access database.

⁵See also Lamsfuß (2017): Das Einkaufsverhalten von Karo-/ Lackwerkstätten im Spannungsfeld zwischen IAM & OE; inkl. Einstellungen, Akzeptanz und Bewertung der Teilegroßhändler.

⁶Cf. Wolk/Nikolic/Mende (2017), Garage Structure in the European Car Aftermarket 2016, S. 200.

Garages Participating in the Survey

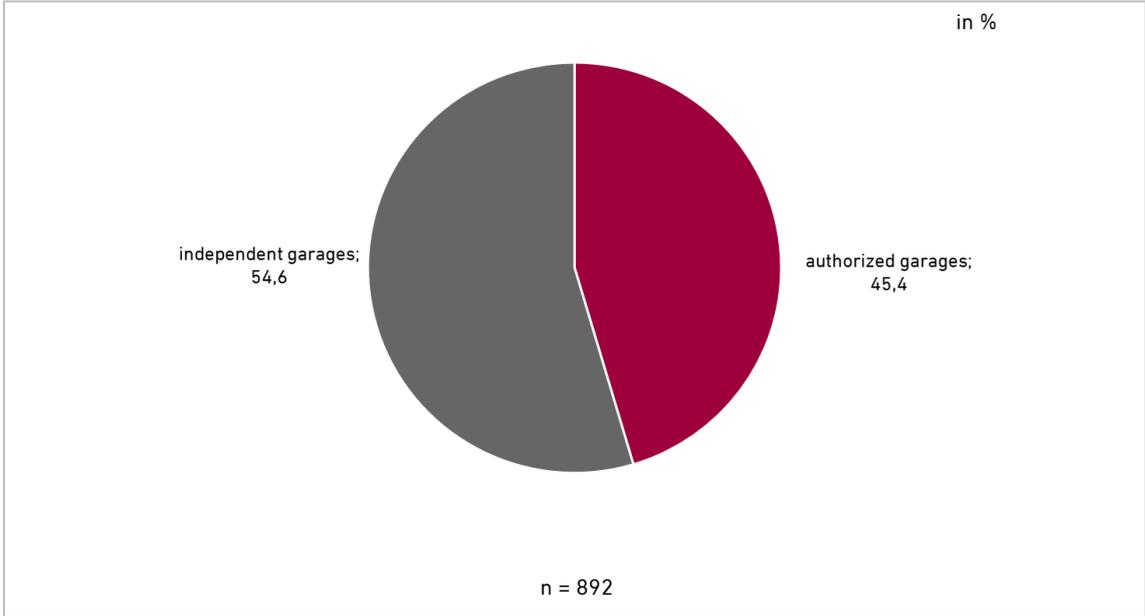


FIGURE 1: GARAGES PARTICIPATING IN THE SURVEY

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SALES GENERATION IN THE GARAGES

The following chapter focuses on sales generation by the garages. To this end, chapters **Fehler! Verweisquelle konnte nicht gefunden werden.** and **Fehler! Verweisquelle konnte nicht gefunden werden.** first analyse the annual sales of the garages and show how this has developed from 2014 to 2015. Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** also features a prediction for the development of sales in the garages up to 2020.

The analysis then goes one step further and differentiates the sales according to fields of activity. Initially, a breakdown into seven main activities was carried out, which was then subdivided further. In this way, the proportion of total sales can be determined down to the individual product groups.

While the total sales still include material and work, these two components were then separated and the proportion of material and wages in the main activities was determined in Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** In addition, Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** determines the proportion of diagnostics & calibration in the total wage for the main activities.

The absolute sales volume in the individual fields of activity can be calculated from the percentage proportions gained (see Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**)⁷. Similarly, the absolute volume of parts or work in the fields of activity can also be determined, as well as the absolute volume of sales for diagnostics & calibration (see Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**). Last but not least, at the end of the chapter, we briefly discuss current challenges regarding well-trained staff and equipment, which are the prerequisites for qualified diagnostics and calibration (chapter 0).

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⁷A detailed analysis will be carried out in a separate study which will follow soon.

5.8 CHALLENGES REGARDING THE QUALIFICATION OF STAFF AND GARAGE EQUIPMENT

....

In the authorised garages surveyed, the entire workforce took part in an average of 35 training days in 2015. The independent garages have an average of just under 10 training days, whereas garages with a garage system took part in training days somewhat more often (10.6 days) than those without (7.8 days). In both garage types, only a few days of training had to be cancelled due to illness or scheduling bottlenecks.

Number of Training Days in 2015 That Were Attended or Had to Be Cancelled

	All autohori- zed garages	...of a premium brand	...of volume brands	All inde- pendent garages	...with system	...with- out system
Number of training days of all employees	34,8	57,6	27,6	9,4	10,6	7,8
Number of cancelled training days of all employees)	1,5	2,3	1,3	0,7	0,6	1,0
Number of training days per productive employee (without trainees)	4,7	4,7	4,7	3,2	3,6	2,8
Number of cancelled training days per productive employee (without trainees)	0,2	0,2	0,2	0,3	0,1	0,4
	n=357	n=86	n=268	n=455	n=254	n=189

TABLE 1: NUMBER OF TRAINING DAYS IN 2015 THAT WERE ATTENDED OR HAD TO BE CANCELLED

The values quoted are highly influenced by the size of the garage. If the number of training days is compared to the number of productive employees, the authorised garages show an average of 4.7 training days (per employee). In contrast, the independent garages show 3.2 training days per employee, whereas those with a garage system show a higher quota (3.6). In addition, the independent garages without a garage system frequently had to cancel training courses (0.4 training days per employee) than those with a system partner (0.1).

....

ELECTRONIC PARTS CATALOGUES USED

While B2C online shops are little used by authorised garages and independent garages, ordering of spare parts via B2B takes place primarily using electronic parts catalogues of manufacturers and dealers. Of the garages surveyed, around 95 % currently use such a parts catalogue.

The most frequently mentioned parts catalogues were.....

Overall, independent garages use a larger number of parts catalogues than the authorised garages. On average, the independent garages purchase via more than 1.8 parts catalogues. In addition, among the independent garages surveyed, around half use a parts catalogue, one quarter uses two and around one in five uses three to seven parts catalogues.

Number of Electronic Parts Catalogues Used on Average

Number of cases	Garages type	Number of used parts catalogues
n=388	All authorized garages	1,4
n=103	Authorized garages of a premium brand	1,3
n=282	Authorized garages of volume brands	1,4
n=470	All independent garages	1,8
n=275	Independent garages <u>with</u> system	2,0
n=194	Independent garages <u>without</u> system	1,6

TABLE 2: ELECTRONIC PARTS CATALOGUES USED BY INDEPENDENT GARAGES WITH A GARAGE SYSTEM

7.1.3 NUMBER OF GENUINE SPARE PARTS DEALERS

Not unexpectedly, the average number of genuine parts suppliers in authorised garages at just under 4 is considerably lower than the number in independent garages (7.2). While the authorised garages predominantly order genuine parts from their contract partners and normally purchase genuine parts for other brands from other dealers only in exceptional cases, the independent garages turn to various dealers (usually car dealerships) – depending on the vehicle brand required. About 30 % of the independent garages purchase their genuine spare parts from 10 or more OES dealers. This is necessary because hardly any OES dealer can handle the full range of genuine spare parts.⁸ Accordingly, the independent garages obtain their genuine spare parts from a larger number of OES dealers than they buy spare parts from independent wholesalers (see Chapter Fehler! Verweisquelle konnte nicht gefunden werden.).

For this reason, the average number of parts wholesalers of genuine spare parts in the independent garages is also higher than in the authorised garages, as the number of brands serviced in the independent garages is generally higher.

Average Number of Dealers of Genuine Spare Parts*

Number of cases	Garage type	Number of distributors
n=384	All authorized garages	4,1
n=98	Authorized garages of a premium brand	3,1
n=283	Authorized garages of volume brands	4,5
n=455	All independent garages	7,2
n=255	Independent garages with system	7,6
n=196	Independent garages without system	6,7

*with stamp of the car manufacturer

TABLE 3: AVERAGE NUMBER OF DEALERS OF GENUINE SPARE PARTS*

⁸Please also see: Heufelder, S.; Heitfeld, S.; Wolk, H. (2017): Genuine parts wholesalers in Germany.

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Number of Genuine Spare Parts Dealers* in Authorised Garages by Vehicle Brand

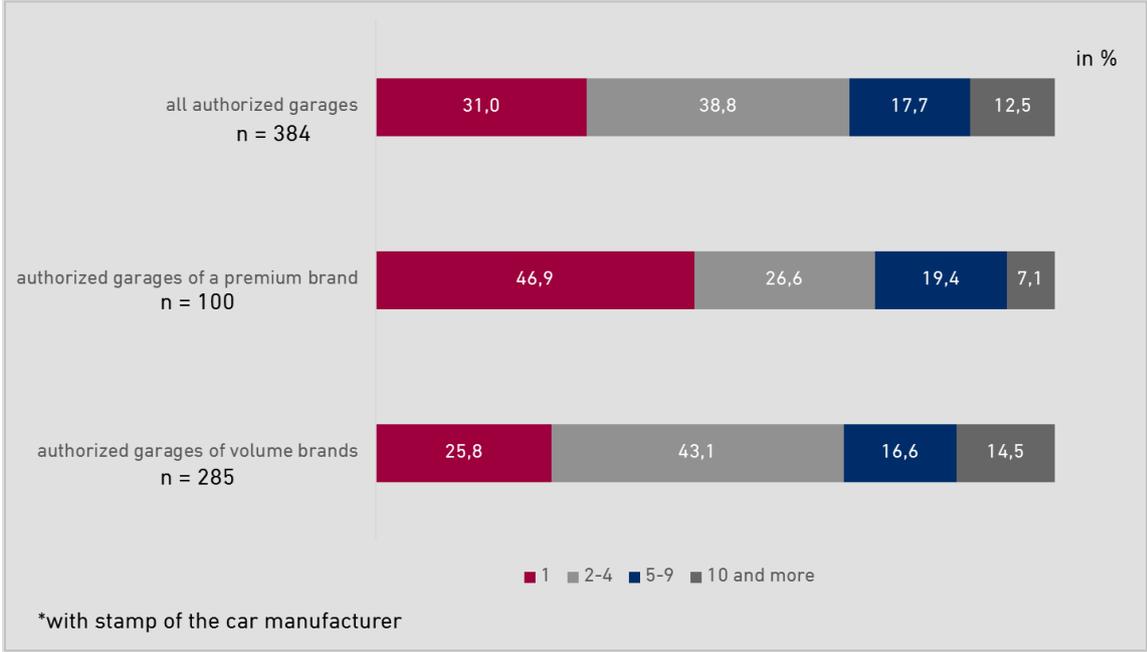


FIGURE 2: NUMBER OF GENUINE SPARE PARTS DEALERS* IN AUTHORISED GARAGES BY VEHICLE BRAND

8. RATINGS OF THE PARTS WHOLESALERS

An essential part of the study is that garages not only named their preferred parts wholesalers, but also rated them. For this, the garages surveyed rated the respective dealer for various aspects that are important when purchasing spare parts, such as the dealer's delivery speed or the availability of spare parts. Rating was based on the school grading system (1 = "very good" to 6 = "inadequate", plus "not available").

The garages were also asked how important these criteria were for them when purchasing parts (see Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.**). In this respect, it is possible to establish a connection, whether the dealers have recognised which requirements the garages have and in which areas the dealers meet the requirements – and in which they don't.

Chapter **Fehler! Verweisquelle konnte nicht gefunden werden.** shows which individual parts wholesalers best meet the needs of their customers and have received the best ratings by the garages.

8.1 RATINGS OF THE INDEPENDENT PARTS WHOLESALERS

8.1.1 RATINGS OF THE INDEPENDENT PARTS WHOLESALERS FROM THE PERSPECTIVE OF THE AUTHORISED GARAGES

The best ratings were given to wholesalers of spare parts from the independent market by authorised garages in terms of...

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PRICES

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The sale to private individuals is unfortunately not possible.

User	Format	Price
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Enterprise licence	PDF	4.195€
Combi package with bodywork & paint shops Report (released in Q1 2018) The body & paint Report is based on the same survey of 120 body and paint shops.	PDF	4.995€

The study can be purchased under: <http://www.wolk-aftersales.com/das-einkaufsverhalten-von-werkstaetten-im-spannungsfeld-zwischen-iam-oes.html>

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