TABLE OF CONTENTS

0.0 EXECUTIVE SUMMARY	1
1.0 INTRODUCTION	3
What is this report about?	
The focus of the report is the market for road assistance acquired by individual drivers of passenger cars	
Rationale	
There are multiple reasons for producing research about this market across 12 European countries	
including its size, complexity and competing distribution channels	
Methodology	
Primary research	
Research for this report includes over 80 actual and potential distributors of road assistance	
Market data	
Competitor data	
Definitions	
Terms and abbreviations	
Operating models	6
Currencies, exchange rates and inflation	6
PartnerBASE	6
Finaccord	7
2.0 MARKET ANALYSIS	8
Introduction	8
Distribution through key partner organisations	8
Summary of organisations researched	8
Provision rates	9
Road assistance is available from all car manufacturer brands investigated	9
and as an optional extra from most motor insurance brands	
Operating models	10
Use of a single, external partner for road assistance is preferred by most distributors	10
Partnerships with car manufacturer brands	12
Allianz Global Assistance and ANWB account for the vast majority of manufacturer brands partnerships	12
Partnerships with motor insurance brands	13
SOS International holds the most relationships, including several via Route Mobiel	
followed by Allianz Global Assistance and Eurocross Assistance	
Partnerships with independent warranty providers	
All five independent warranty providers researched act as distributors of road assistance	
Partnerships with automotive clubs	
The ANWB has around 4.4 million members in total of whom around 2.8 million are direct members	
Other distribution channels	
Direct distribution	
Other online brands	
RoadGuard was first to market with an app for on-demand post-paid road assistance	
Payment cards and bank accounts	
Online aggregators and brokers	
The Netherlands hosts several dedicated aggregators for road assistance	
and a few brokers also act as tied agents for it	
Other types of distributor	16

ROAD ASSISTANCE IN THE NETHERLANDS

Two major repair shop networks distribute road assistance branded under their own names	16
Some travel insurers have integrated road assistance into their travel insurance policies	16
Market size, segmentation and forecast	17
Over 80% of the market value is attributable to one distribution channel category	
which also generates almost 60% of the volume of prepaid contracts acquired by consumers	17
In spite of multiple distribution points, there is still a significant minority of drivers that lack road assistance	17
Leading competitors	20
The ANWB remains dominant but is being challenged by a long and diverse tail of smaller competitors	

LIST OF GRAPHICS / TABLES

D.0 EXECUTIVE SUMMARY	1
Key market data for road assistance for consumers in the Netherlands	2
1.0 INTRODUCTION	3
2.0 MARKET ANALYSIS	8
Summary of actual and potential distributor organisations researched in the type, 2017	Netherlands, segmented by
Provision rates for road assistance in the Netherlands, segmented by type of o	
Operating models used for road assistance in the Netherlands, segmented b	
Operating models used for road assistance in the Netherlands, segmented b (table)	
Competitor share of partnerships for road assistance in the Netherlands, 201	
Competitor share of partnerships for road assistance in the Netherlands, 2017	
Gross written premiums and other revenues from road assistance for consumplus forecast to 2020	
Gross written premiums and other revenues from road assistance for con segmented by distribution channel, 2016	sumers in the Netherlands,
Number of policies and gross written premiums and other revenues from roa in the Netherlands, segmented by distribution channel, 2016, plus forecast to 2	
Market shares of gross written premiums and other revenues of leading comfor consumers in the Netherlands, 2016	
Market shares of gross written premiums and other revenues of leading comfor consumers in the Netherlands, 2016 (table)	•