

TABLE OF CONTENTS

0.0 EXECUTIVE SUMMARY	1
1.0 INTRODUCTION	3
What is this report about?	3
<i>The focus of the report is the market for road assistance acquired by individual drivers of passenger cars</i>	<i>3</i>
Rationale	3
<i>There are multiple reasons for producing research about this market across 12 European countries</i>	<i>3</i>
... including its size, complexity and competing distribution channels	3
Methodology	4
Primary research	4
<i>Research for this report includes over 80 actual and potential distributors of road assistance</i>	<i>4</i>
Market data	4
Competitor data	5
Definitions	5
Terms and abbreviations	5
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
<i>Road assistance is available from all car manufacturer brands investigated</i>	<i>9</i>
... and as an optional extra from most motor insurance brands	9
Operating models	10
<i>Use of a single, external partner for road assistance is preferred by most distributors</i>	<i>10</i>
Partnerships with car manufacturer brands	12
<i>Allianz Global Assistance and ANWB account for the vast majority of manufacturer brands partnerships</i>	<i>12</i>
Partnerships with motor insurance brands	13
<i>SOS International holds the most relationships, including several via Route Mobiel</i>	<i>13</i>
... followed by Allianz Global Assistance in Eurocross Assistance	13
Partnerships with independent warranty providers	14
<i>All five independent warranty providers researched act as distributors of road assistance</i>	<i>14</i>
Partnerships with automotive clubs	15
<i>The ANWB has around 4.4 million members in total of whom around 2.8 million are direct members</i>	<i>15</i>
Other distribution channels	15
Direct distribution	15
Other online brands	15
<i>RoadGuard was first to market with an app for on-demand post-paid road assistance</i>	<i>15</i>
Payment cards and bank accounts	16
Online aggregators and brokers	16
<i>The Netherlands hosts several dedicated aggregators for road assistance</i>	<i>16</i>
... and a few brokers also act as tied agents for it	16
Other types of distributor	16

ROAD ASSISTANCE IN THE NETHERLANDS

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

LIST OF GRAPHICS / TABLES

0.0 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 Netherlands, segmented by type, 2017	9
Provision rates for road assistance in the Netherlands, segmented by type of organisation, 2017	10
Operating models used for road assistance in the Netherlands, segmented by type of organisation, 2017	11
Operating models used for road assistance in the Netherlands, segmented by type of organisation, 2017 (table)	12
Competitor share of partnerships for road assistance in the Netherlands, 2017: car manufacturer brands	13
Competitor share of partnerships for road assistance in the Netherlands, 2017: motor insurance brands	14
Gross written premiums and other revenues from road assistance for consumers in the Netherlands, 2016, plus forecast to 2020	18
Gross written premiums and other revenues from road assistance for consumers in the Netherlands, segmented by distribution channel, 2016	19
Number of policies and gross written premiums and other revenues from road assistance for consumers in the Netherlands, segmented by distribution channel, 2016, plus forecast to 2020	20
Market shares of gross written premiums and other revenues of leading competitors for road assistance for consumers in the Netherlands, 2016	21
Market shares of gross written premiums and other revenues of leading competitors for road assistance for consumers in the Netherlands, 2016 (table)	22