DUCKER CARLISLE

GLOBAL CONSULTING, STRATEGY AND M&A SERVICES

SEE WHAT THE INDUSTRY SEES.

THEN SEE WHAT ONLY YOU CAN.

The Ducker Carlisle Insights Subscription.
Real market intelligence for the decisions shaping your business.

DUCKERCARLISLE.COM

BENGALURU | BOSTON | DETROIT | LISBON | MUNICH | NEW DELHI | PARIS | SHANGHAI

THE MOMENT

The industry is moving faster than your data can keep up.

WHY IT MATTERS

Aftersales is where margin is defended, loyalty is earned, and reputation is built. Dealer capacity, technician turnover, tariffs, and changing vehicle technology are all moving at once.

The OEMs winning this are the ones making decisions with real market intelligence, in real time. Not just their own numbers. The full industry picture, refreshed as it changes.

That is what Ducker Carlisle delivers.

THE COST OF WAITING

$23.5M

Estimated annual cost to an average OEM for every 1% of vehicles not fixed right the first time. Decisions made with stale data are decisions made too late.

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WHAT WE SOLVE FOR

Better decisions. Made with better intelligence. From every angle.

Ducker Carlisle gives you four lenses on the industry, in one place.

SEE THE INDUSTRY

The full peer picture

How the industry is performing across parts and service, benchmarked and continuously updated. Learn from peers before you have to learn on your own.

HEAR THE DEALERS

The dealer voice

What your parts managers, technicians, service advisors, and managers are actually experiencing, benchmarked across brands.

READ THE MARKET

The customer signal

Consumer sentiment, aftermarket demand, and market sizing that show where the industry is heading, not just where it has been.

ASK YOUR QUESTIONS

Answers to what you need

Custom studies and deep dives on the specific questions your business is facing right now, delivered by analysts who know the channel.

30+	175+	14,000+	30,000+	30+
OEMs	warehouses	dealers	annual dealer voices	years of history

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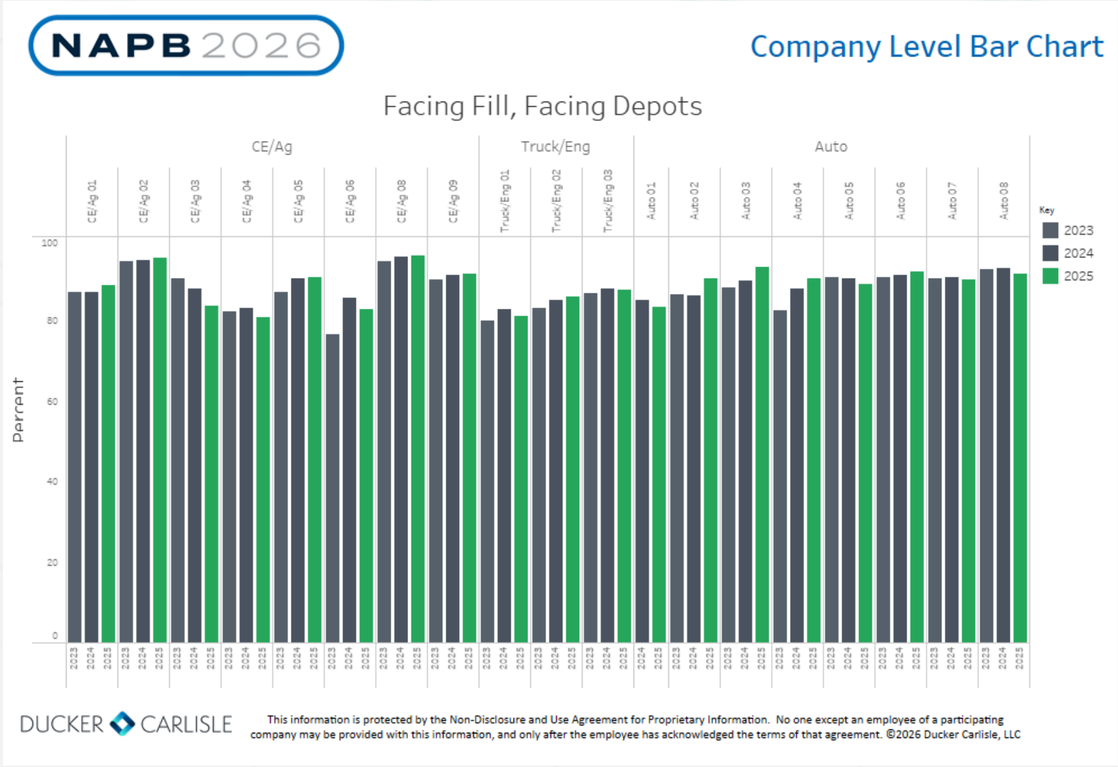
The dashboard that stays open. The data that keeps moving.

The Aftersales Intelligence Dashboard gives you continuous access to your most critical KPIs, refreshed on the cadence they move at. Your definitive annual benchmark, plus the month-to-month view of what is changing in between.

Always on, always accessible
Log in from any device, any time.
The dashboard doesn't close.

Refreshed as the market moves*
The KPIs that shift most, updated monthly.
The benchmark, published annually.

Compare at any level
Peer averages, segment cuts, regional views, historical data. Filter to your question.



* Critical KPIs refreshed monthly. Full benchmarks published annually. Dashboard access is continuous.

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THE INSIGHTS TOOLKIT

The tools inside every package.

A short guide to what each element gives you, before you choose a package.

BENCHMARKS & DATA

Aftersales Intelligence Dashboard
DC's continuously accessible benchmarking dashboard. Log in from any device to see how your parts and service operations compare to the industry, with critical KPIs refreshed monthly.

NAPB
North American Parts Benchmark. Since 1993. Contribute your parts operations data; receive a full annual benchmark showing how you compare against peer OEMs across 175+ metrics.

NASB
North American Service Benchmark. Since 2006. Service retention, technician turnover, customer-pay sales per repair order, and 87 other service KPIs, published annually.

EVAB
Electric Vehicle Aftersales Benchmark. Covers EV-specific parts and service operations, including dealer readiness, technical training, and EV battery logistics. The full aftersales side of the EV transition.

Focus Day
Full-day working sessions on a single high-priority topic, with peer OEMs and DC analysts in the room. A deep, practical view of one topic that matters now.

Conference Passes
Each pass admits one team member to the annual NAPB or NASB conference — peer sessions, analyst briefings, and network conversations.

DIRECT VOICE & CUSTOM

Dealer Surveys (Auto)
Annual surveys of dealership staff — parts managers (APMS), service managers (ASMS), Accessory Sales Teams (AAS), service advisors/technicians (ASAS/ATS). 53,000+ voices a year.

Dealer Surveys (Heavy Equipment)
Heavy Equipment Parts Survey (HEPS) captures the voice of dealer parts managers; Heavy Equipment Service Survey (HESS) rotates annually across service managers, service advisors, and technicians. Both benchmarked across HE brands.

Custom Studies
Light (~5 questions) or full (~20 questions, results webinar) research on a question specific to your business. Answers in weeks, not months.

Market Monitor
Two components in one product: a one-time Market Size and Share deep-dive assessment of your parts market share versus OEM benchmark peers, plus a monthly-updated dashboard tracking service transaction volume and value across the automotive service market by segment (OEM dealers, chains, tire, quick lube, IRFs).

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WHY SUBSCRIBE

Market intelligence. The relationship built to deliver it.

The Ducker Carlisle Insights Subscription gives you continuous access to the intelligence, on terms that let your organization plan around it.

01
Price certainty
Lock in a known annual cost for two to three years, with a capped CPI escalation. No unexpected increases at renewal.

02
Meaningful Savings
Subscription rates offer real savings versus single-year pricing. Discussed at the contracting stage.

03
Stronger partnership
More analytical and advisory resource from DC.

04
Cross-subscriber intelligence
As more OEMs subscribe across more products, benchmark comparisons get deeper and more comparable.

05
Priority access to what's next
First access to new benchmarks, product extensions, AI-enhanced alerting layers, and pilot opportunities.

06
Simplified procurement
One Master Subscription Agreement. One contract, one invoice, one renewal conversation.

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AUTOMOTIVE PACKAGES

Six levels of market intelligence.

Choose the depth of intelligence that matches how central aftersales is to your business.

01
ACCESS
See the industry

02
FOCUSED
One benchmark

03
PERFORMANCE
How you perform

04
VOICE
What dealers say

05
COMPLETE
Both lenses combined

06
EXECUTIVE
The full partnership

Performance and Voice sit alongside each other. Complete combines both.

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ACCESS & FOCUSED

Two entry points into DC Insights.

Access is the on-ramp. Benchmark is offered on an exception basis where the focus is a single benchmark.

ACCESS

See the industry, before you're in it.

For OEMs interested in learning more, before committing to the full data submission required for full participation.

- **Anonymized industry data**
  Aggregated benchmark and results, no OEMs named. Data to see where the industry is.
- **3 conference passes**
  Three team members at the annual NAPB conference.
- **Defined upgrade path**
  A structured transition to full participation after a year.

FOCUSED

One benchmark. One focused view.

For OEMs whose intelligence needs center on a single benchmark. Exception basis.

- **NAPB Participation**
  Full parts benchmark. Your data in, full peer comparison out.
- **3 conference passes**
  Three team members at NAPB.
- **1 Focus Day**
  One full-day working session on the topic of your choice.
- **Aftersales Intelligence Dashboard access**
  Live NAPB dashboard, with critical KPIs updated monthly.

TOOLKIT REFERENCE

NAPB = parts benchmark · Focus Day = peer working session

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PERFORMANCE

How your operation performs, against the industry.

THE INTELLIGENCE YOU GET

For OEMs treating aftersales as a strategic function. Performance combines the full parts, service, and EV benchmarks with continuous dashboard access, so you see how your operation stacks up across every dimension the industry measures.

PEER NETWORK

30+

OEMs contribute to and learn from the same benchmark data, protected under strict NDA.

Performance is where most OEMs start when aftersales performance drives the strategy.

WHAT'S INCLUDED

- **NAPB, NASB, and EVAB participation**
  The full annual industry picture across parts, service, and EV aftersales operations.
- **12 conference passes total**
  Four passes to each of NAPB, NASB, and EVAB. Send the right people to the right sessions.
- **4 Focus Days across any benchmark**
  Four full-day working sessions on topics of your choice, with peer OEMs in the room.
- **Dashboard access across all three benchmarks**
  Continuous access to the Aftersales Intelligence Dashboard for NAPB, NASB, and EVAB. Monthly KPI updates for NAPB and NASB.

TOOLKIT REFERENCE

NAPB = parts benchmark · **NASB** = service benchmark · **EVAB** = EV aftersales benchmark · **Focus Day** = peer working session

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VOICE

What your dealers actually experience, in their words.

THE INTELLIGENCE YOU GET

For OEMs who need the dealer-side reality to inform strategy. Voice combines the four annual dealer surveys into one commercial relationship, so you hear directly from the parts managers, service managers, service advisors, and technicians running your channel and how you compare against your peers.

DEALER VOICES

53K+

Annual dealer employee responses across parts and service roles.

Voice is the right fit when the dealer perspective is what's missing from your view.

WHAT'S INCLUDED

- **4 annual dealer surveys**
  Each year: parts managers (APMS), service managers (ASMS), and accessory sales teams (AAS), plus either technicians (ATS) or service advisors (ASAS) on alternating cycles.
- **Role-specific benchmarks**
  Each survey benchmarked across brands. See how your dealers rate you, measured against your peers.
- **Dashboard survey layer**
  Continuous access to the Aftersales Intelligence Dashboard for the survey benchmarks.
- **Verbatim access**
  The direct comments from dealer respondents. What they say, in their words.

TOOLKIT REFERENCE

APMS/ASMS/AAS/ATS/ASAS = role-specific dealer surveys · **Dashboard** = Aftersales Intelligence Dashboard

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COMPLETE

Both lenses. One relationship.

THE INTELLIGENCE YOU GET

Benchmarks tell you how you perform. Surveys tell you what your dealers experience. Complete combines both, adds dedicated custom research capacity, and gives you the fullest picture of your aftersales operation short of the Executive tier.

AT RISK

$8M

Estimated annual part sales lost by average OEM from just a quarter-point decline in service retention.

Complete is the standard for OEMs where operational data and dealer voice both drive decisions.

WHAT'S INCLUDED

- **Everything in Performance and Voice**
  Full NAPB, NASB, EVAB participation plus all four annual dealer surveys.
- **15 conference passes total**
  Five per benchmark. One more than Performance to accommodate the wider team.
- **6 Focus Days across any benchmark**
  Two more than Performance, giving room to go deep on more topics.
- **1 light custom study**
  One 5-question custom study per year, topic of your choice, fielded through the DC panel. Results in weeks.
- **Dashboard access, full portfolio**
  Continuous access to the Aftersales Intelligence Dashboard across all benchmarks and survey layers.
- **12% ad-hoc discount**
  Higher preferred rate on ad-hoc additions.

TOOLKIT REFERENCE

Custom study = your question, fielded through DC · **Dashboard** = Aftersales Intelligence Dashboard

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EXECUTIVE

Ducker Carlisle as your embedded intelligence partner.

THE INTELLIGENCE YOU GET

For OEMs where aftersales performance is a board-level priority. Executive is the full intelligence partnership: industry benchmarks, the dealer voice, the customer signal, and dedicated senior team access on a single agreement.

THE FULL PORTFOLIO

1 Master Subscription Agreement covering the complete DC Insights portfolio.

Executive is a strategic commitment on both sides.

WHAT'S INCLUDED

- **Everything in Complete**
  All three benchmarks, all four dealer surveys, six Focus Days, full dashboard access.
- **Custom executive workshop**
  A strategic session led by DC experts, reviewing your performance across all products and highlighting where to prioritize improvement efforts.
- **Market Monitor**
  Two components in one product: a one-time Market Size and Share deep-dive assessment of your parts market share versus peers, plus a monthly-updated dashboard tracking service transaction volume and value.
- **Custom CSS brand report**
  An increased sample size for your brand in our annual consumer survey, plus a deep-dive report on how your consumers differ from the industry — what drives their service preferences and where they go to the aftermarket.
- **Dealer panel access + 2 custom pulse surveys**
  Direct access to the DC dealer panel for two custom pulse surveys per year, on questions specific to your dealer network.
- **1 full custom study**
  One 20-question custom study per year, with results webinar. Deep answers to a strategic question.
- **15% ad-hoc discount**
  Highest preferred rate across all ad-hoc additions.

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HOW TO ENGAGE

A conversation.

Three steps to the intelligence.

01

Discovery call

A 30-minute conversation to understand your current view of the industry and where you want to strengthen it.

02

Package recommendation

We propose the package that matches your organizational scale and strategic priorities, with pricing tailored to your scope.

03

Contracting

A single Master Subscription Agreement covering the full relationship. Two-year term standard; three-year available.

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YOUR DUCKER CARLISLE TEAM

The people behind the intelligence.

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The standards behind the intelligence.

01 | How current is the data?

The Aftersales Intelligence Dashboard is continuously accessible, with critical KPIs refreshed monthly. Full benchmarks are published annually.

02 | Who owns the data?

Ducker Carlisle owns all benchmark data, survey instruments, indices, and derived metrics. Subscriptions convey a license to access and use insights.

03 | How is confidentiality protected?

You see peer benchmark data under a strict NDA. Survey responses are anonymized before publication.

04 | How does pricing get set?

Pricing is set based on organizational scale, participation history, and package scope. Final pricing is confirmed during the contracting phase.

05 | What is the contract term?

Two-year subscription is standard. Three-year terms are offered. Auto-renewing with 90-day notice to cancel.

06 | How is dealer engagement managed?

Strict frequency-cap governance. No individual dealer respondent is contacted more than twice per calendar year across all DC programs.

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THE INSIGHTS PORTFOLIO

AFTERSALES INTELLIGENCE DASHBOARD · NAPB · NASB · EVAB · DEALER SURVEYS

BETTER DECISIONS, IN THE MOMENT YOU NEED THEM.

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