Branding with customer experience for manufacturers & suppliers in the automotive aftermarket

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ABSTRACT,

The automotive industry finds itself under increasing pressure towards sustainability, with its rich marketing history we can see most car brands adjusting to this trend. However, the automotive aftermarket does not seem to follow suit, in fact, the automotive aftermarket seemingly lacks behind in the development of brands compared to the OEM sector of the automotive industry. Additionally, in the automotive aftermarket customer experience has its complexities due to the lack of direct communication with the customer. This paper investigates how customer experience management practices contribute to effective branding for manufacturers and suppliers in the automotive aftermarket. To research this, a literature review is created, building an understanding about branding possibilities and complexities in the automotive aftermarket. After which three cases were constructed by analysing semi-structured interviews supplemented with the digital presence and marketing practices that were conducted by the cases. Additionally, a marketing agency was consulted to offer an outside perspective. The data from the cases were then analysed and discussed, after which implications were drawn. Amongst these we first find that manufacturers and suppliers rely on distributors to push their brand towards lower levels of the market chain. Secondly, customer experience management practices can mitigate the negative effects of this reliance on distributors for branding. Lastly, it was found that there are currently few methods employed that enable positive customer experience. The research concludes with the finding, customer experience practices enable not only the brand company but also its associated distributors to better support customers (garages), generating a superior customer experience which when referred back to the brand leads to increased brand value.

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1. INTRODUCTION

We can all name many car brands, and this is no surprise. The automotive industry is large, powerful and very present. This is visible on most mainstream media channels where you will find advertisements from car manufacturers, leading to the observation that brand value and reputation is important to these companies. In fact, brands can become competitive advantage in turbulent markets (Doyle, 2002; Wiedmann, Hennigs, Schmidt & Wuestefeld, 2011). This is further reinforced by the reduction of technical advantages between car manufacturers resulting in brands playing a more prevalent role (Verhoef, Pauwels & Tuk, 2012). However, we can also observe that in the automotive market strong brands are almost exclusively original equipment manufacturers (OEM), such as Toyota, Ford and BMW. Yet, the OEM sector only accounts for roughly half of the automotive industry; the other half is composed of the aftermarket (Capgemini, 2010). The aftermarket includes activities conducted after the initial sale of the product, as a result many OEM manufacturers such as Bosch or Autolite are active in both markets as they may sell replacement parts. To add to the confusion, services from dealer garages are also considered OEM services. And while these services are aftermarket services they are still counted as part of the OEM sector.

The largest difference between OEM and aftermarket (AM) parts is that AM parts are never produced for new cars, instead, the AM produces alternatives to original equipment. AM parts are generally cheaper or in some cases improve car performance. Meanwhile, OEM parts are specifically made for the original car model by the car company or by an independent automotive parts manufacturer. The car companies have the strongest brands of the automotive sector. This may not come as a surprise considering whole car manufacturers have to sell much more directly to consumers than their AM counterparts, resulting in a higher priority being awarded to branding in consumer markets. Moreover, there have been great investments in the study of consumer branding in both the professional and academic worlds, further amplifying the willingness and capacity to conduct successful branding in consumer markets.

The AM is large and thus important. Yet, naming independent AM parts manufacturers is complicated for anyone without far-stretching passion for automotive. The question is why? There are large AM manufacturers with impressive marketing budgets, then how come the consumers do not know about them? Perhaps they focus solely on corporate brands as the AM is mostly a B2B industry? Why would that be? Did AM companies determine the consumer has no interest in their products?

This makes one wonder whether AM companies have something to gain through branding and whether they are missing opportunities by not investing. Even more so, due to consumers generally having become savvier and more careful with the products they buy and use, not only looking at quality and durability but also sustainability (Murphy, Öberseder & Laczniak, 2013). Does this trend also exist in the automotive industry? Can AM companies adapt to this trend or possibly even stimulate it? If this is true, that would surely offer branding opportunities.

The automotive industry is becoming more turbulent and they will face challenges regarding sustainability (De Stefano, Montes-Sancho & Busch, 2016). Branding may yet become an important tool to preserve the identity of organizations. The raised questions lead to the following research question:

- *how does customer experience management practices contribute to effective branding for automotive aftermarket manufacturers and suppliers?*

Three sub-questions were used to develop a satisfying answer to the research question:

a) What is the relevance of branding for automotive aftermarket manufacturers and suppliers?
b) Who are the main stakeholders for automotive aftermarket manufacturers and suppliers?
c) What are common branding practices for automotive aftermarket manufacturers and suppliers?

Outcomes of this research could lead to insights regarding the importance of branding in the automotive AM and the factors required to develop strong branding strategies.

2. LITERATURE REVIEW

The automotive industry is a powerful industry and is one of the largest sectors in the world. The industry can be divided in two distinct segments: original equipment manufacturers (OEM) and the aftermarket (AM). Within the OEM segment a further distinction can be made; car manufacturers and parts manufacturers. Car manufacturers rarely produce all components of a car themselves. Instead they buy parts from parts manufacturers and assemble them into their car. For example, BMW could use a power steering pump manufactured by Bosch. Interestingly, for a different car or model the exact same product might be offered by Bosch an AM option for a different car. This indicates that companies can be active in both markets and that there can even be overlap in some cases.

Capgemini (2010) developed a scheme about the upstream and downstream activities and it offers a clear overview of the automotive industry. The aftermarket takes place after an original car has been sold and financed and can be divided in two sections; (a) parts, either to improve performance, appearance or the replacement of worn parts and (b) services, which include repairs, telematics, navigation and entertainment. The European aftermarket employs over 5 million people and there are approximately 1 million companies active in this sector, the majority of which are small or medium sized enterprises; often garages or specialists offering repairs, car diagnostics or other after sales services (Quantalyse Belgium, 2019). These firms generally wish to stand out and increase in value, branding is a viable strategy to create an identity and stimulate company growth (Ghodeswar, 2008).
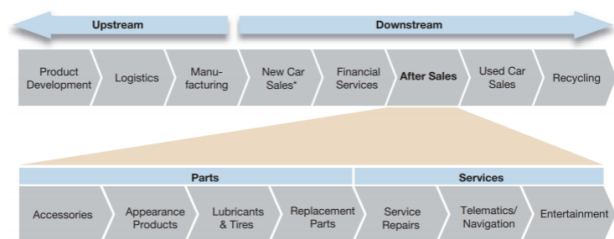

Figure 1. Scheme of automotive upstream and downstream activities with focus on after sales.

2.1 What is branding

There is some debate as to what branding is and how it should be defined. Jones & Bonevac (2013) conducted a literature review in which they concluded that existing definitions of branding are incomplete. In their research they explore a number of existing

definitions and combined these to create a more comprehensive definition. Additionally, the authors found that a key aspect of branding is the ability it generates to distinguish oneself from competitors (Jones & Bonevac, 2013). Brands can also reduce risk for consumers. Consumers are more likely to engage with brands they are familiar with, but brands can also increase risk for the company if they fail to satisfy their consumers (Assael, 1995). Yet, branding is not the only way to reduce risk and it is not fair to attribute all of the risk mitigation to branding. Therefore, a more complete statement is that brands generate trust and loyalty commitment; consumers trust brands which in reality means that a brand can be promise for a good product or a service (Ambler, 1992). Furthermore, brands can reflect a personality through advertising styles, price, and most importantly the product itself (Ogilvy, 1983).

Brands relay messages, establish relationships, create added value (Keller, 2009). They can be conceptualized as signs or logos, a way to quickly recognize a product and because of this it creates advertising opportunities wherever this logo goes. Brands could even be seen as a value system, a pedestal to display a firm's moral code and ethical compass. However, at its core, branding is about communicating the value of a product or service that you are offering (Kotler & Pföertsch, 2006), implying that your brand should evolve with your company (Silveira, Lages & Simões 2013). If you combine all the functions of a brand you may realize that a brand is in fact a definition of what a firm really is. In a sense, 'the definition of brand is best understood as being synonymous with the term definition' (Jones & Bonevac, 2013, p. 1).

The effectiveness of branding practices is affected by three key components; integration, investment in stakeholders and corporate reputation. The degree to which these components are satisfied or superior to other brands increases brand strength (Gray, 2006). The components have slightly different goals, good *integration* means correct communication of brand values to the right stakeholders through the most effective channels. Investment in stakeholders means understanding consumers and business relations but is also about internal marketing and training in order for employees to better understand the brand and reflect this in their services. Lastly, corporate reputation is the image a stakeholder has of an organisation, whereas brands are expressions of identity from the organisation (Abratt & Kleyn, 2012).

2.2 Branding in B2B
Now that it is established that brands are expressions of firms, it is time to uncover how this unfolds into a Business to Business (B2B) setting, specifically in the automotive aftermarket. First, it is commonly assumed that Business to Consumer (B2C) branding practices are centred around emotions, whereas in B2B branding aims to focus on logic and rationality (Ballantyne & Aitken, 2007). Therefore, perceived quality is generally considered the most important aspect for B2B branding (Mitchell, Holtom, Lee, Sablynski & Erez, 2001; Bendixen, Bukasa & Abratt, 2004). Positive experiences and relationships can also lead to loyalty commitment (Doney, Barry & Abratt, 2007); specifically, it was found that clients find trust more important when developing loyalty commitment than product/service quality (Doney et al., 2007). A strong brand with a positive image amongst key stakeholders allows companies to ask for a price premium (Bendixen et al., 2004). This also illustrates the importance of identifying, maintaining trust and good relations with key stakeholders.

Additionally, B2B products and services are usually more complex compared to B2C products and services; there are fewer customers, and usually larger volumes per customer (Kotler & Pföertsch, 2006). In the automotive industry car manufacturers rely on a few large automotive parts suppliers (Collins, Bechler & Pires, 1997; Choi and Hartley, 1996). This creates a risk for car manufacturers as they can become increasingly dependent on a few firms. In order to mitigate some of these risks, firms seek to build strong relationships with their business partners and relational investments are high (Chang, Cheng, Tsai & Lai, 2018).

Similar to B2C branding, B2B branding results in reduced perceived risk (Bengtsson & Servais, 2005; Mudambi, 2002; Ohnemus, 2009) and has a positive effect on satisfaction with a purchase decision (Low & Blois, 2002; Mitchell et al., 2001). It is safe to assume that investing into building a positive brand image can allow firms to increase company value and revenues. While it is not something that is practiced commonly, research shows that brand equity does increase for car manufacturers through ingredient branding (Tiwari & Singh, 2012; Kotler & Pföertsch, 2010; Butnariu, 2017). Furthermore, supplier selection plays an important role in the end users' perception of the product and brand reputation (Kotler & Pföertsch, 2006; Dickinson & Heath, 2006; Lienland, Baumgartner, & Knubben, 2013). From this it can be concluded that there is some level of interdependence between the supplier and the 'seller' in regard to branding. The ingredient brands can strengthen the brand of the whole car manufacturer and ingredient suppliers compete for orders with their brand. This results in the increasing relevance of ingredient branding for the supplier.

Examples of firms with excellent ingredient branding practices are Intel and AMD. These firms mainly design, and manufacture technology used in computers by most well-known brands. Both have become a very strong brands, with Intel featuring in the top 20 strongest brands by Interbrand (2019), interestingly just ahead of BMW but behind Mercedes and Toyota. If anything, this really indicates the importance of B2B branding. However, it does require a certain level of sophistication amongst consumers; ingredient branding effectiveness increases as consumers are more engaged with the product (Kotler & Pföertsch, 2007).

2.3 Key Stakeholders
Stakeholders play an important role in regard to branding. You need to appeal to consumers, to conduct effective branding, but employees also represent the brand and make branding possible (Punjaisri, Wilson & Evanschitzky, 2008). Furthermore, in B2B markets relationships are essential and much of the automotive industry exists in this B2B context (Doney, Barry & Abratt, 2007; Keller, 2009; Chang, Cheng, Tsai & Lai, 2018). For this reason, it is critical for automotive AM companies to understand key stakeholders and the ability to identify these accurately. Moreover, the creation of a strong and positive brand does not lie only in providing superior value to customers, but it is also influenced by delivering value to stakeholders in general (Gray, 2006).

According to a model by McKinsey (2018), we find that the key stakeholders present in the automotive industry can be divided in 2 categories: OEM network and AM. The categories can be divided in 5 sections: (1) parts manufacturers, (2) parts distributors, (3) workshops, (4) intermediaries and (5) end customers. All these sections are influenced by slightly different stakeholders; overlap of stakeholders exists and a single company can be active in more than one section. The main

difference between the OEM network and the aftermarket is the size of the companies active in the sectors. The OEM companies consist of a few very large players while the aftermarket consists of many companies of varying sizes that are generally speaking much smaller than the large OEM players. In Europe this results in a balance between AM and OEM that is approximately 48% to 47% share of the total automotive industry (Capgemini, 2010). The remaining 5% comprise online companies, who mainly sell parts online. It is expected that this new segment will grow, however some AM and all OEM companies are also offering their products online as a means to compete.

Quantalyse Belgium, (2019) studied the aftermarket in Europe and found that approximately 56% and 61% of the consumers prefer to use independent garages for maintenance and repair. This gives AM companies an edge over OEM companies. This also illustrates that there is enough demand for services from independent garages, reinforcing the need of independent garages for branding and advertising as a means to not only retain the market share of AM over OEM but also to compete with other AM companies.

2.4 Co-branding
There are many component manufacturers in the automotive industry; and as a result, a lot of potential for ingredient brands and co-branding. However, co-branding is not very visible to consumers. Ingredient branding is perhaps the most well-known co-branding practice however there are also other practices such as cooperative advertising, dual branding and joint sales promotion (Cooke & Ryan 2000; Swaminathan & Reddy, 2000).

There are four value creation types in co-branding; awareness co-branding, value endorsement co-branding, ingredient co-branding and complementary competence co-branding (Blackett & Russel, 2000). For any of these co-branding types to be successful there needs to exist mutual trust and high alignment between the processes, expenses and expectations of the co-branding alliance (Cassia, Magno & Ugolini, 2015).

Awareness co-branding requires the least amount of mutual trust and alignment. The goal is to effectively reach a wider audience due to the appeal of the partners brand power.
Value endorsement co-branding takes it a step further here the key is for both firms to reinforce each other's values (Blackett & Russel, 2000). An example would be Breitling and Aston Martin. Their products are independent however, their core values are similar, both are luxury products and have similar target groups.

Next, there is *ingredient branding*. Here the key aspect is that the product contains a product from another firm, and you use the strengths of the other firm to each other's advantage. Some firms in the automotive take advantage of this but it is not common, and supplier selection is considered to be underutilized and undervalued for its effects on brand reputation (Lienland et al., 2013). Especially in the automotive aftermarket there has been little research conducted concerning ingredient branding and the degree to which it could be used.

Lastly, *complementary competence co-branding*, the products of the firms have nothing to do with each other but are still able to complement each other. For example, Esso and Tesco combining gas stations with supermarkets. The idea is that people will make use of both services due to them being close together rather than having to travel twice. This is a great advantage for brands that participate in complementary competence co-branding over brands that do not.

3. METHODOLOGY
The present research can be divided in two sections; an extensive literature review and case studies. The literature review provides an overview of branding in a B2B context, branding practices in other markets and some market information for the automotive industry. The literature review delivers the groundwork for the case studies. Three cases were built for the research with the help of semi-structured interviews with three different companies in the Netherlands. The interviews were supplemented with information observed from the companies' websites and their respective social media presence, as well as materials that were provided during the company visits such as leaflets and brochures. Lastly, a fourth interview was conducted with a marketing agency to supplement the case studies with an external perspective.

The main function of the case studies is to provide new information regarding effective branding practices in the automotive aftermarket. Based on the information collected in the case studies it may be possible to draw new conclusions and offer new insights for branding in the automotive aftermarket.

3.1 Semi-structured interviews
Qualitative semi-structured interviews were used to conduct the research in this paper and forms the basis for the case studies. Qualitative research is suitable due to the nature of the research context; while the participants are all active in the automotive aftermarket, they also have certain differences that need to be kept in context to ensure validity of the results (Yin, 2003). Semi-structured interview was selected as a research method because it allows for flexibility and the opportunity for participants of the interview to contribute with their own knowledge more freely to the research, helping to uncover unanticipated challenges and solutions. And use professional knowledge to enhance the academic knowledge. Furthermore, in case the answer of the participant invokes more questions or is in some way insufficient it also allows the interviewer to use cues and prompts to get a more complete answer (Mathers, Fox & Hunn, 1998).

The semi-structured interviews were structured around the 3 research sub-questions with 3 or 4 independent questions each. The answers to the sub-question are used to structure a response to the main research question. The first sub-question is used to find out whether branding is considered important at all to automotive aftermarket companies. The second sub-question explores the important stakeholders to these companies and the last sub-question investigates the different branding practices in the automotive aftermarket. Here it is important to figure out the degree to which these practices are successful and how this is measured. Moreover, it could be interesting to compare responses between the sub-questions as to determine whether there is any disconnect, especially in terms of relevance compared to usage of branding practices. The interviews were conducted in Dutch, for, it is unnatural to conduct an interview in a foreign language between people who share the same native language, and this could be detrimental to the quality of the interviews. The interviews were recorded and transcribed, then all relevant findings of the interviews were highlighted and used in this research one company at a time.

3.2 Case Study
The research takes shape in the form of case studies. A case is built for each of the three automotive participants. The findings of the cases are first presented and analysed independently and

later the underlying themes are discussed with all cases and the literature in mind. Case studies are best used when the context and conditions related to the point of study are important to understanding the case (Yin, 2011). For the automotive industry this is important as there are many small influencers to branding that cannot be assessed individually. Moreover, the aftermarket still is a very broad market with products that range from extremely complex to very simple, to companies that have contact with consumers to companies that do not have contact with consumers at all. In turn it is expected that depending on company and market specific context this will alter their approach to branding to the extent that it they cannot be assessed without this context. The case studies draw information from two main sources; a) the interviews and b) their digital presence and marketing leaflets. The information from the interviews is used in their respective case studies to create a more in depth understanding about the case and its context. Whereas, the digital presence and other visible marketing activities offer additional information about mainly the context of the company.

4. EMPIRICAL RESEARCH

4.1 Nederlandse Radiateuren Fabriek

Nederlandse Radiateuren Fabriek (NRF) is a Dutch manufacturer and supplier of cooling products founded in the year 1927. Ever since, they have grown, and now they have around 400 employees and 8 factories across Europe and Asia, with an additional 19 distribution centres to facilitate the export to over 80 countries across the globe. Furthermore, some of these factories have testing facilities, and research and development departments to design competitive products. During a visitation to their factory in Mill I was able to see some of these facilities and a large section of the factory is dedicated to product testing. NRF provides high quality products and the extensive product testing facilities enable good warranties.

On the NRF website it is clear that NRF is a premium manufacturer and supplier and prides itself on high quality and service. NRF offers online courses which synergizes with this ideal, the courses offer information explaining why specific components of cooling systems break down and how to install NRF products. Furthermore, the website provides tools that allow customer to search for car specific cooling parts through providing the license plate of said car. These practices have in common that they both ease the customer journey and when successful assure positive client or customer experience.

On the web shop there are 3 categories of products; a) easy-fit products, b) economy class products and c) regular products. All of these receive some branding attention branding but there is special attention to the easy-fit products, as this product line can be found on both the main page for the web shop as well as the main page of the regular website. On the web shop you can make the distinction between the product lines fairly easily, for example, it is immediately clear that the economy class product line is meant for older cars with a lower residual value and as such offers cheaper alternative solutions for original NRF parts.

Additionally, their website provides an event overview including archives. There seems to be at least 60 events a year mentioned in this overview, interesting to note that these events are spread out over the world, they range from relatively small client fairs to the largest fairs in automotive, marine and industrial markets. Lastly, it is interesting to note that NRF is not only an aftermarket player. They also provide OEM cooling systems for the marine and industrial markets, in automotive they are almost exclusively active in the aftermarket.

4.1.1 Relevance of branding in the automotive aftermarket

The cooling market consists of a few large players. Competition is fierce, and the market is well known and understood by all parties. Purchasing groups and distributors often buy from both NRF and their competitors. Large competitors such as Valeo and Nissens have strong brands and in order to compete it is important to NRF to own a strong well-known brand. As a result, NRF branding activities are focused on creating brand awareness and generating a positive brand image. Selling more products is seen as an indirect result of the branding activities. Branding is a pull technique, creating awareness to clients who then read into NRF and end up contacting the company. Making branding relevant as a method for finding new clients or more accurately a method for potential clients to find NRF.

The branding activities share an overarching message; NRF is a worldwide producer and supplier of cooling parts with a range of high-quality cooling products (8000 products) for the aftermarket. This is paired with offering high quality and good services. The quality of products is guaranteed through testing facilities at NRF, guaranteeing performance on the same level as that of OE parts. High service levels are attained through local services and warehouses with a 30-man strong sales team and a 50-man strong customer service department can timely attend people in their native tongue. Additionally, local warehouses ensure timely delivery.

4.1.2 Main stakeholders in the automotive aftermarket

For NRF the main stakeholders for branding are the management team, business unit managers and clients. Expectations are understood due to extensive experience as they have been active in this market since 1927. Clients expect a wide range, good prices, high quality, product availability and timely delivery with a good client service all throughout from NRF. NRF is solely active in B2B sectors and focuses on cooperating with purchasing groups and distributors, however at the same time they aim to serve specialists, or more accurately their clients' client in order for them to select NRF products, effectively by enhancing the customer experience they stimulate customers to buy from NRF clients.

4.1.3 Common branding practices in the automotive aftermarket

NRF has a multitude of branding activities. First, they write product catalogues, articles, flyers and newsletters about their services and products to create brand and product awareness. Articles can be either commercial or technical, showcasing company strengths and technical knowhow, respectively. For example, an article about an award that NRF has won indicating that they are performing on the highest level in terms of product range, availability and quality. Negative publicity is rare, they attempt to solve it with the client by being open and transparent, customer satisfaction is very important to NRF. In general, the branding practices are outlined in the marketing plan with a focus on long-term goals decided by the management. For example, attaining a strong reputation in the railway industry.

NRF attends around 80 events and (client) fairs. Every two months they write a newsletter and an update about new

products. This update comes with an excel sheet which allows companies to update their product databases with ease. Every quarter an update is made for the more customer friendly and separately branded easy-fit products. Moreover, NRF facilitates their distributors with a European Championship promotion, and the exact details of the campaign are to be discussed with the distributors. Lastly, NRF does seasonal campaigns in summer and winter as it aligns to either air-conditioning products or heaters.

The marketing strategy is determined at headquarters and all major projects are developed there too. However, local offices translate and adapt the global messages to the local area. And are given the freedom to execute the marketing strategy in their area. NRF facilitates marketing campaigns for their clients, often in cooperation with distributors. However, there is no co-branding, only co-initiatives such as inventing a marketing campaign with a client or going to a fair with other automotive companies. Additionally, ingredient branding is not possible as the product is not valued enough by the end-customer.

4.2 Eurol

Eurol was founded in 1977 and is now the largest Dutch independent lubricants manufacturer. In the 1990s the company started to produce its own lubricants and R&D, as a result the quality of their lubricants increased, and they became a global player in the market. They are especially large in the automotive aftermarket, but they also produce lubricants for Agri, industry, trucks and maritime sectors. It is noteworthy that Eurol has a rich history in branding that started with the name of the brand; Eurol is a combination of the words Europe and oil. Their founding ideals were about becoming an international brand paired with high service levels and quality and later sustainability would play an increasingly important role in the industry and to Eurol.

In the 2000s the Eurol brand name awareness increased significantly, and this can be attributed to participation in the Dakar rally. In fact, a Dakar rally car in action with the Eurol logo visible is the first thing you are greeted with when landing on their website. They consider the Dakar a method to proof the quality of their products on an international podium and they are affiliated to 5 teams participating including big names such as Fernando Alonso and Tim & Tom Coronel.

Regarding branding, it is noteworthy that Eurol uses a brand portal which is accessible from their website. Eurol partners can take branding resources from this portal. The portal is quite extensive and offers a lot of information on how the brand and products should be treated; Ensuring brand consistency between the different partners and importers. For customers, the website offers a few tools which should ease the customer experience. Most notably a tool that allows the customer to search for products related to a car brand, model or license plate. The website also offers two digital advisors related to Eurol products to aid customers, usually specialists or mechanics, it is very customer friendly as it asks the customer a few questions and then based on the responses it will determine the most adequate Eurol product as well as offering a possible cause of the problem.

4.2.1 Relevance of branding in the automotive aftermarket

To Eurol branding is about building trust and brand recognition. They differentiate between 2 types of brand awareness. 'Spontaneous brand awareness' and name recognition. Name recognition is knowing a company exist while spontaneous brand awareness is about being one of the first company someone thinks of in the industry. For example, Asian car brands, Toyota (Spontaneous brand awareness) vs Subaru (Name recognition). Eurol aims to become top of mind and achieve spontaneous brand awareness. A clear disadvantage is the lack of street visibility, this is explained due to having no fuel and gas stations. Moreover, branding is also relevant to build trust as it is important to reassure consumers that their expensive machines are safe with Eurol products.

Eurol sees a brand a collection of associations. Eurol aims for these associations to be: high quality, innovation, sustainability and experience. The central message is passion for performance. Products are developed with maximum performance in mind regardless of conditions. Performance in tough motorsport events but also in daily practice. Moreover, performance is can be speed, reliability, fuel savings, less engine pollution or more engine power. It is important that these claims are not unsupported. An example of providing proof of quality is the participation in the Dakar rally.

4.2.2 Main stakeholders in the automotive aftermarket

Employees, and the importance of involving them are a point of focus for Eurol. For example, last year, information boards were added to inform employees of events; however, steps still need to be taken to truly involve employees. Eurol measures internal satisfaction, especially in times of labour shortages it is important to retain employees.

An advantage for Eurol is the fact that it is a family business. Therefore, the directors and owners are the same stakeholder. Other stakeholders are clients, consumers, suppliers, the media, and the local governments in regard to licenses and permissions to build and produce. For clients Eurol conducts client satisfaction measurements. In general, there is a trend for higher client expectations and Eurol as a premium brand aims to meet or exceed these. For suppliers it is important that both parties are reliable and use a marking system. However, there are no branding activities involving suppliers.

Eurol uses internal programs to find solutions to problems. For example, the 'war room' where a specific problem is tackled as effectively as possible. Eurol has also mapped internal business processes and important deciders. On LinkedIn they work with a sales navigator and this allows them to approach relevant deciders more efficiently and specifically.

4.2.3 Common branding practices in the automotive aftermarket

When it comes to branding practices there is a division between the Netherlands and the rest of the world. Eurol is its own importer in the Netherlands and as such conducts all Dutch marketing. In foreign countries they have importers. Eurol aims to aid these importers to be successful with the Eurol brand in their region; global brand, local presence. Campaigns can differ between regions, however, Eurol ensures they share the same message.

Eurol is currently executing a service point concept to increase street visibility. It essentially allows dealers and mechanics to be Eurol partners, the service points are supported with digital applications like a dealer locator for consumers. Other branding practices include motorsport events such as, the Dakar rally, Hellendoorn rally, NK autocross, yearly 5-10 major events and 10-15 large fairs. However, counting all smaller events the tally

approaches a 100. These events serve two purposes: Generating memorable positive experiences and proof of quality.

In order to mitigate low visibility on the streets Eurol has opted for a strong digital presence. They create reach through Facebook, Instagram, twitter, LinkedIn. On Facebook they use Global pages; their Facebook is linked to country pages allowing Eurol to send out a singular message as a brand. The advantage of this approach is presence, an importer from Iceland who connects to the Facebook page immediately has 115.000 followers, showing that the Eurol brand carries a large following.

Negative publicity does happen on social media occasionally. The policy is simple, be honest if a mistake was made, but it is not uncommon that Eurol is not at fault. In that case, they refute wrong claims, and attempt to initiate a 1 on 1 discussion through a direct message and prompting the consumer or client to call if they prefer. Moreover, Eurol refrains from deleting negative comments. Eurol is currently working on gathering positive reviews as they are amongst the most powerful marketing and branding tools. It is easy to claim many qualities but much more convincing when a consumer does it for you. An example would be a campaign for the Eurol specialty line where consumers can talk about Eurol specialty line products in a magazine called 'Agriblad'. Secondly, there is a lot of stigma surrounding oil. However, Eurol attempts to convert this into a sustainability goal. As it stands the world needs lubricants, and high-quality oil and lubricants result in more efficient machines. For example, the use of specialty line products results in a reduction of fuel usage by 7% and is also free of Teflon and microplastics.

Eurol is clear in their stance on co-branding: You need a very strong reason to participate in co-branding as it might be derogatory to your brand. As a result, they do not participate in any form of co-branding. In terms of strategy the focus is on a few matters at a time. This means they have to say no to some marketing initiatives. Eurol also measures their main drivers which are quality, innovation and sustainability, these need to be high in order to satisfy their brand promise.

4.3 Kavo Parts

Kavo Parts was founded in 1986 and started with importing car filters for Asian cars to the Netherlands. Now they are one of the largest Asian car parts suppliers in the world with a near complete parts range for Asian cars. Apart from a great range they value high service a good quality. Branding has started to gain traction in 2015 with a brand overhaul and a conscious message behind their services. This message can be found on the folder and brochures that were given to me and it is also present on their website and they have made a slogan that works well with it. This slogan and their drivers are further explained on their website and in the brochures and attempts to explain their business values.

Kavo Parts usually sells to distributors and importers. The relationship with these partners is valued very highly and as a result high customer satisfaction is very important to Kavo Parts in branding and marketing activities. This is visible on their website, the leaflets and brochures. Furthermore, they allow customer reviews on their website and have conducted a customer satisfaction measurement. Additionally, they offer an E-catalogue as a client portal making it easier for clients to find the correct parts. They also offer a support page with marketing materials such as flyers, advertisements and brochures which can be used by distributors.

Kavo Parts started with importing filters and as a result their level of knowledge in this specific field is high. To capitalize on this specialisation they have created a second brand called AMC-filter. High quality is the main driver for AMC-filters; it is considered a premium brand even more so than the Kavo brand itself which is also a premium brand. To guarantee the highest quality, the AMC-filters are produced by the same OEM companies that produce parts for the original car brand.

4.3.1 Relevance of branding the automotive aftermarket

Branding and marketing activities were upscaled 5 years ago with the appointment of a dedicated marketing employee. Before this, marketing and branding was a secondary task of the sales team. As a result, branding has made great strides in the last few years but is also still maturing in the company. The entire style of the company and branding activities was adapted to a more modern, international and professional standard. However, the marketing budget is still somewhat limited. This year the aim is to overhaul the social media presence and Kavo is working with a marketing agency to set up a campaign for this purpose.

Kavo is an Asian car specialist but the focus was primarily on Japan. While Japan is important to Kavo, they are more than just a Japanese car specialist. The slogan was also adapted. The message used to be 'Your specialist in Asian car parts' accompanied with a Japanese landscape and a layout that tapped into the Japanese aspect. Now it is 'what drives us'. This slogan is explained and elaborated on in a campaign. Driving is linked to cars, but more important is the us part. In the campaign it is explained how Kavo Parts is a family business. This culminates in a stronger personal connection to clients and a high service level. In the campaign Kavo's strengths are further emphasized; specialist in Asian cars, having a great range of Asian car parts and lastly creating satisfied customers and getting you home safely.

4.3.2 Main stakeholders in the automotive aftermarket

For Kavo internal organization and distributors are the most important stakeholders. It is unrealistic to reach consumers in over 70 countries and generate brand awareness amongst these consumers. Decided to focus on distributors who in turn promote products to their clients. These clients, in turn work with the level below and eventually it reaches the consumer. It does happen that a garage contacts Kavo directly and they do aim to increase branding towards specialists to make them select Kavo products. Especially because the market is becoming more volatile, the traditional chain is changing, layers are merging, and some might disappear. Companies keep getting larger. Kavo Parts is deeply rooted into this chain which makes sense considering how highly they value business relations.

There is also more competition from low-cost companies, and prices are getting more important. Kavo aims to find a certain balance as they do not want to hurt their service levels. Personal connection to companies often helps with creating contracts all parties are happy with. Kavo does not want clients who only buy parts sporadically, rather are looking for long-term partners. This strategy is followed both up- and down streams. The purchasing department examines possible companies and seek long term partnerships with suppliers.

4.3.3 Common branding practices in the automotive aftermarket

Kavo states that it is difficult to make a campaign that is relevant for all countries they are active in. For example, brand awareness is strong in the Netherlands, decent in Portugal and Spain but weaker in Italy and North Africa. For this reason, Kavo has opted for regional campaigns in cooperation with their clients and distributors. The distributors push Kavo products to the levels below. However, there is little focus on the consumers themselves. Reason being relative lack of interest by consumers in which brand of car parts they use. But this is changing, consumers and mechanics have become 'smarter' and started buying their own parts. In the automotive aftermarket this is already 15% and expected to grow. Effectively, this means consumers are skipping steps in the chain

Negative publicity happens rarely, but it exists. Companies are professional enough to keep it indoors. Attempt to fix it within sales and if this is not possible part ways. However, this is very uncommon as Kavo is flexible and value business relations highly. The social media presence is currently not very large and interaction with consumers is somewhat small resulting fewer options for both positive and negative publicity.

The current focus is on expanding brand awareness in countries where this is low. In cooperation with distributors they facilitate campaigns but Kavo mainly lets their distributors brand them with Kavo strengths in mind. These are high availability, quality and service level for a fair price. The common strategy is to grow together with clients. The goals are effectively the same as both parties benefit from selling more Kavo Parts.

4.4 Slag bij Almelo

Slag bij Almelo is a marketing agency that has worked with multiple companies active in the automotive aftermarket and they may able to offer insights from a slightly different perspective. They have worked with large Dutch companies and organisations amongst which we find the University of Twente. The findings from this interview allow for an expert opinion and an external perspective.

4.4.1 Relevance of branding the automotive aftermarket

First, there is a high uncertainty in the automotive industry regarding the future of the industry. Increasing pressure due to sustainability goals and fuel transition will need to be met and therefore companies must futureproof their organisation and brand. Companies need to evaluate whether their current brand image is compatible in this future reality and if possible or required translate parts of the brand to this future.

One of the core tasks of Slag Bij Almelo is creating a positive brand image for their clients. For example, a premium automotive aftermarket manufacturer and supplier is under threat of low budget players from Eastern Europe. To retain market leadership their reputation and aftersales are important, essentially the service to the garage or specialists needs to be high to justify a premium price; Branding can aid in delivering this message to new clients. Most companies usually think about short-term goals and seek immediate results. However, brand preferences are deeply rooted even before needing a product. For example, some people will use CoolBlue to find a product they need whereas others may use Amazon or simply search it on google whereas other people may know a local store that offers this product and prefers to buy it there.

Moreover, a central message is important, branding is positioning. Showcasing what you do differently compared to competitors. The ability to do this clearly and in line with corporate identity is critical. If branding activities do not align with the identity of the company, it loses its meaning and effect.

4.4.2 Main stakeholders in the automotive aftermarket

At the core of branding there are 3 main stakeholders. First, the internal organization, having the same understanding of the brand promise all over the company, understanding the composition of your current and required future workforce. Second, are prospects and third are clients. Prospects and clients are different, and different branding practices apply to either group. Prospects are companies that could become clients in the future and as such have different needs than existing clients. In automotive you have clients on multiple levels. However, the chain finds itself under increasing pressure and is merging and integrating. Companies or customers skipping levels of the chain is becoming more common. Lastly, it is important not to become too dependent on either a single client or supplier.

To add onto clients, client and customer experience are forms of branding. You can see clients as channels that speak about your company, a positive experience can be shared and help in the creation of a positive brand image. On the Slag bij Almelo website it is possible to see their clients, it is interesting to note that all automotive clients have a premium brand.

A specific stakeholder in the automotive aftermarket are the OEM manufacturers. The aftermarket is a competitor to OEM manufacturers. There are large OEM manufacturers that are actively pursuing the largest possible piece of the complete automotive industry. In general, these companies have much greater resources than aftermarket companies and due to this aftermarket companies should monitor OEM activities to understand whether they could potentially threaten their position. Other threats and opportunities come from public opinion, large parts of the automotive industry are somewhat controversial due to environmental concerns and it is definitely worth examining your position due to this, important to consider your current competences and whether these are applicable in the future and if they are not how to translate these to new activities.

4.4.3 Common branding practices in the automotive aftermarket

Slag bij Almelo develops branding practices and strategies in cooperation with and for multiple companies active in the automotive aftermarket. First, they aim to understand the company's current situation. Simultaneously the market is analysed and what the market would likely look like in the future. It is essential to keep monitoring and develop extensive understanding of the market. Sometimes it may be beneficial to transform a brand and if you do opt for brand transformation that means that the people inside the organisation will have to adapt to this new standard, some people won't be able to. Therefore, companies must determine the skillsets and qualities required to work for their future brand promise. The DNA of an organization and the employees that are part of it need to be the same as the brand. Lastly, strategy relays back to distinctiveness, or identity. Most companies talk about what they do but fail to articulate what differentiates them from competitors.

Public opinion is volatile, and sentiments can be powerful. Companies should always react to negative publicity but tread carefully. Reacting too defensively makes it seem as if they are shifting the blame, instead a response should always be argued based on their own knowledge and the truth. Moreover, a response should be very precise to avoid misinterpretation.

Co-branding in itself is an interesting concept but should only be considered if both companies can support each other without competing and share similar brand messages. However, if you believe your brand is of higher quality than that of the other participant it may hurt your brand.

5. DISCUSSION

5.1 Relevance of branding in the automotive aftermarket

First, all three cases and the marketing agency consider branding relevant and a positive influence on their activities. Moreover, due to increasing uncertainty in the automotive market, the importance of brands as a medium to retain trust can increase. Additionally, if the automotive market does change to the extent that the company needs to adapt its key activities, then brands can play another role. According to Slag bij Almelo it is possible to translate brand values into new new activities in the same or similar markets. Effectively, you can use the brand reputation that already exists for your brand to enter new market segments. This is reinforced in the literature review where it is implied that a brand should evolve with the company (Silveira et al., 2013).

A key similarity is that all three companies aim to have premium brands. Moreover, in the automotive sector, Slag bij Almelo works almost exclusively with premium brands. Leading to the suggestion that branding is considered more relevant to premium brands, and as a result their branding practices are more developed than those of non-premium brands. An explanation to this could be that premium companies need to justify their price; the brand can relay the message of the added value from the additional services or increased quality of the product (Bendixen et al., 2004; Keller, 2009). Yet, this research acknowledges the possible bias created by the selection of the cases and is limited because only Dutch firms participated in the research.

The three cases all have an overarching central message in line with their main competences and the expectations from clients. Slag bij Almelo mentions that a central message is important because a brand is positioning and showcasing what you do differently; *it is explaining your competitive advantage.* And further reinforced in the literature, Jones & Bonevac (2013) state that a key aspect of branding is the ability to distinguish oneself from competitors. Additionally, it is suggested that being able to prove your claims is beneficial for the brand value and image.

5.2 Main stakeholders of the automotive aftermarket

As to stakeholders, there is a key difference between NRF and the other two firms. NRF is the only company that is not family owned. This affects branding indirectly, NRF has an extra stakeholder to consider.

It was found that all three companies highly value clients, specifically distributors and importers which are very important to their branding. *This is because they rely on these clients to push their brand further down the chain*. In general, it could be advisable to attempt to reach the client's client (customers), or independent garages and specialists directly. European

aftermarket research has shown (Quantalyse Belgium, 2019) a preference of consumers for independent garages over OEM garages. To reach said independent garages and specialists there are two main options: either selling directly to them or selling through the existing market chain. However, distributors would not appreciate getting bypassed. additionally, stimulating customers to buy your products from your distributors is a common practice that could receive even more attention.

The employee is a branding channel, and the workforce needs to be compatible with both the current and future brand image. This is sensible considering employees do represent brands (Punjaisri et al., 2008). Furthermore, Punsjaisri et al. (2008) state that employees in contact with customer and business relations such as sales, customer services and purchasing department have the most opportunity for branding. Employee branding attempts to ensure that employees incorporate brand values into their work (Mitchell, 2002; Miles & Mangold, 2004). However, all three companies make limited use of employee branding, instead deciding to focus their employee branding efforts on specific departments. A possible explanation could be the limited interaction with clients of most employees.

Client and customer experience were also mentioned as an important branding practice; this was confirmed by Slag bij Almelo who consider the client a medium which can share positive experiences with a brand resulting in the strengthening of the brand image. This is also supported by Doney et al. (2007) who found that positive experiences lead loyalty commitment. In this light it is interesting to note the current efforts from *Eurol to stimulate customers to leave positive reviews.* Moreover, all three case companies highly value client and customer satisfaction and have digital tools, instructions and customer service teams at their disposal to ensure a positive client experience.

Furthermore, it was established that *reaching garages and specialists could be complicated or detrimental to the brand due to straining the relationship with distributors.* However, by providing support in the form of customer service automotive aftermarket firms attempt to influence garages and specialists to opt for their products when they buy it from a specific distributor.

5.3 Common branding practices in the automotive aftermarket

The case companies all lack the resources to conduct intensive branding on an international level. Due to this they rely on their clients to push their brand down streams and mainly play a facilitating and supervisory role. *Branding practices are mostly centred around raising brand awareness to other companies, and automotive aftermarket firms are fairly invisible to end-consumers.* However, this will likely change in the coming years. In fact, Kavo parts mentioned how it is becoming more common for consumers to buy car parts independently and have them install it at a local garage for pricing concerns.

In general, negative publicity is rare; whenever it occurs with another company it is typically remedied privately. However, *all three cases seek to increase their digital presence which gives a platform to consumers to share both positive and negative experiences.* Naturally, both positive and negative publicity becomes greater as the digital presence increases. As companies increase their digital presence, specifically their social media presence they are likely to face more negative publicity and will have to prepare adequately.

The case companies do not conduct co-branding. At most they participate in co-initiatives, for example, attending a fair with other automotive aftermarket companies. In its current form, it exists to share attendance costs rather than to enhance brand

strength and is too shallow to call co-branding. *However, this does not mean it is not worth exploring co-branding opportunities.* The companies are rightfully sceptical when it comes to starting a co-branding alliance as it could be detrimental to the brand. From the co-branding types discussed in the literature review the most fitting seems to be ingredient co-branding or possibly value endorsement co-branding. However, as of now the consumer is not interested enough in specific car parts to make these practices effective. The exception may be in niche sectors. For example, consumers or companies that participate in sports events and seek optimal performance.

A common pitfall in branding is that companies fail to explain how they are distinctive and instead only talk about who they are and what they do. With this in mind it is interesting to see how Kavo Parts evolved in the last five years by overhauling their corporate identity and approach to branding. They went from a company with a brand that explained what they did to a company with a brand that explains much more by incorporating one of their main strengths, which is their high service levels and personal connection as a family business, essentially the creation of long-term partnerships (Doney et al., 2007; Bendixen 2004). The brand now actively represents the company's strengths. A second finding relating to branding strategy is the ability to prove claims, strongly back your claims to construct a reliable brand.

It can be deducted that customer experience is considered an important factor for branding in this sector. Customer experience includes all interaction of the company with the customer. However, it noteworthy that the customer is the client of the distributors and as a result direct contact with customers is uncommon. *There are different strategies to generate a positive experience divided in two categories; a) quality of life services and b) new services.* Quality of life improvements enhance existing services. For example, using car license plate to find the correct parts instead of having to insert the chassis number. New services are completely new concepts. For example, the service points supported by digital applications. An important requirement to implementing customer experience management practices is ensuring both customers and employees know of the new features and understand how they work. This is reinforced in the literature as it said that employees make branding possible since they can incorporate brand values into their work.

Suppliers and manufacturers in the automotive aftermarket often rely on distributors to conduct part of their branding. It is important to ensure that these distributors have the means to conduct successful branding through providing the correct resources. Because of the lack of direct contact it is difficult to reach the customers that use the product. Customer experience can play a role in convincing users to select your products. It is possible to reach customers in the form of customer service and in the form of technical support. It is important that consumers know how to reach you and that finding the correct help is an easy process, either through instructions, digital help or through direct support with a phone call. Essentially, easing the process of part selection and installation can ensure a positive customer experience which in turn results in a stronger brand image.

5.4 Contribution of customer experience management practices to branding in the automotive aftermarket

Branding is seen as relevant by all companies and they all dedicate resources to marketing and branding. They share a similar trait in that they own a premium brand. Leading to the conclusion that branding is relevant to premium companies in the automotive aftermarket, and the suggestion that branding is more

important to premium brands than budget brands in the automotive aftermarket. Moreover, as found by Slag bij Almelo and reinforced by Jones & Bonevac (2013) branding is about explaining your competitive advantage. Essentially, a brand should highlight the key strengths of a company in a short and easily absorbed message. With that in mind, there is no reason why non-premium brands should not be able to conduct branding granted that their competitive advantage can be explained through a brand. However, at the same time, the urgency of branding is higher for premium brands because they need to justify their prices to attract customers, especially in a ratio dominated Business-to-business market.

In addition to Jones & Bonevac (2013) and Slag bij Almelo stating that branding is explaining competitive advantage, an example was found in Kavo Parts. Initially they had a brand identity which fell short to explain their competitive advantage. They added their key strengths to the brand identity; high service levels, personal connection and long term-partnerships. And as a result, now own a more convincing brand. Additionally, a branding message can be supported by generating a memorable experience, and especially the ability to consistently proof your claims are important to increase brand value and reputation. Even more so due to the automotive aftermarket being predominantly B2B with relatively few business relations.

Manufacturers in the automotive aftermarket rely on distributors and clients to push their brand through the market chain, as a result, business relations are highly valued. Furthermore, selling directly to levels below the distributors could be detrimental to both the brand and company performance if it leads to conflicts with distributors. However, manufacturers should increase brand awareness amongst mechanics and ideally to end-consumers. In fact, the case companies have expressed interest in increasing awareness amongst lower levels of the market chain. Moreover, enabling positive customer experiences is not straightforward due to the indirect communication with customers (garages). However, customer experience practices can be set up to improve services and/or discern which company's services you are using. Either way, enabling branding to garages provides an interesting challenge to manufacturers in the automotive aftermarket.

Aspects of this challenge can be mitigated through customer experience management practices. Since it allows for interaction with customers who normally only interact with the distributor. Customers can be a branding medium hence the importance of stimulating customers to leave reviews or share their experiences. There is already some movement in the market as all cases seek to increase their digital presence, giving customers a platform to share experiences. However, for most companies this is in its infancy. If services can be turned into digital applications this is beneficial for accessibility, reach and as a result brand awareness, especially, if you ensure that these applications are easy to find, even without knowing the brand.

Additionally, premium companies synergize well with customer experience. Afterall, if properly executed a premium experience is more likely to be a positive experience than the services offered by a budget company. As such, improving customer experience is not only a marketing activity but also about improving the metrics which make up the premium brand. But customer experience is not the full solution to reaching customers. Customer experience by itself does not raise brand awareness and reaching customers outside of your distribution group is difficult. However, if mechanics find your company when they need help with diagnosis or installation then this could be motivation to look into doing business with your distributors. In the end, distributors will still play a vital role in conducting a large part of the branding for manufacturers and suppliers.

However, rather than only pushing the brand through distributors, companies should attempt to pull customers to them who then in turn buy from the distributors.

6. CONCLUSION

This research focuses on how customer experience management practices contribute to effective branding for automotive aftermarket manufacturers and suppliers. First, the relevance of branding is enhanced because of increasing pressure towards reaching sustainability goals, as such, it is possible that some companies and car components will no longer be required due to emerging disruptive technologies. Therefore, it is becoming increasingly attractive to create a brand reputation that is compatible with the future.

Positive experiences can play a role in enhancing branding (Lanier & Hampton, 2009). This was further confirmed in the Eurol case and by Slag bij Almelo. It was found that both customer and client experience need to be at least equivalent to the brand promise for experiential branding to have a positive effect. Currently the brand promises extent well to the client, however, in some cases starts to lose traction when approaching the customer. Customer experience management practices can aid in branding to customers. The practices exist in the form of increased service levels to the customer. All cases have strong client experience management practices, but there is a difference in the amount of resources dedicated to generating positive customer experiences, likely due to differences in perceived relevance derived from market context.

Manufacturers and suppliers in the automotive aftermarket that seek to brand to customers should consider customer experience management practices. The main reason being the reliance on distributors for both sales and branding. And the greatest strength of experience branding is that it allows branding in multiple levels of the market chain, including both the distributor and the customer, effectively offering an alternate channel to reach customers. For this to work, the products need to be known under the brand name, rather than that of the distributor alone, so that potential clients can find your company directly. In short, it is important to generate a preference amongst customers for the brand. The link between the service/product and the brand is to be a conscious process.

In that sense, both the product and any services including instructions and digital applications need to refer to the brand. Essentially, the customer experience practices enable the brand, but also its associated distributors to better support mechanics, generating a superior customer experience. This results in raised brand reputation amongst existing clients and customers. Moreover, it gives a platform for potential customers to find the brand and raising brand awareness. For example, the oil advisor from Eurol allows people to search which type of oil they should use for their problem, making it more attractive for customers to opt for Eurol products. A drawback of customer experience is that it does not directly affect people outside of the market chain, as such it remains harder to attract new customers with customer experience management practices. However, it is possible to stimulate through enabling existing customers to share their experiences with the public, for example, by allowing customer reviews. Additionally, memorable experiences have a stronger and longer lasting effect; increasing the effectiveness of pulling potential customers to your brand (Lanier & Hampton, 2009).

To facilitate positive customer experiences appropriate tools and support need to exist. The tools can perform an array of functions as long as they are suited to company competences and brand image. Secondly, the employees must work in conjunction with these tools and offer adequate support to customers. Essentially, the employees need to know how the tools work, but also have sufficient technical knowledge to offer support beyond the tools. Additionally, the distributor needs to be aware about said tools and services, distributors may want to redirect customers to these services or possibly even use it themselves. Essentially, the distributor needs to be aware of the customer experience services to help deliver these services to the customer. Some overlap in client and customer experience is bound to exist and should not be experienced as something negative. Afterall, providing services across all the market chain is favourable.

In general, marketing initiatives are conducted by distributors and exist in cooperation and are largely facilitated by the manufacturer or supplier. However, there is no co-branding with distributors or other companies active in the automotive aftermarket. The form of co-branding with the most potential is most likely ingredient co-branding, however this also requires the highest level of trust, because the companies are essentially co-creating a single product. A more attainable form of co-branding is value-endorsement co-branding. Companies can create products that synergize well with each other and endorse these together. However, companies need a very good reason to participate in co-branding and currently this reason is not there.

7. LIMITATIONS AND FUTURE RESEARCH

The main limitations are regarding the characteristics of the firms studied. The three firms that were studied are all premium suppliers and/or manufacturers. As such this is not an overview of the entire automotive aftermarket but solely focused on supplying and manufacturing automotive parts. Moreover, since all companies own premium brands this research does not give insights into branding activities of nonpremium brands. To off-set some of the imbalances created by the sample selection it was decided to interview Slag bij Almelo who can offer a perspective without being part of the automotive aftermarket. Interestingly, Slag bij Almelo only has premium customers, possibly branding is not as relevant to non-premium suppliers and manufacturers. To find out future studies should include a more varied firm selection including non-premium suppliers and manufacturers.

Secondly, all the participants of this study are Dutch and may share similar views on branding. However, they have expressed that branding needs to be approached differently in specific areas for this reason local branding is conducted by the clients of the participating companies. It would have been valuable to study these clients or possibly companies outside of the Netherlands and Europe. This research also does not explain the effect of different customer experience practices instead focuses on outlining the activities contributing to generating positive customer experiences for the companies and aid in understanding their decision-making regarding branding practices.

Future research could look into measuring the effects of experience management branding practices, such as, memorable experience generation and employee branding or any experience branding management practices and the extent to which these are different in the automotive aftermarket compared to other markets.

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10. APPENDIX

Interview questions:

Relevance of branding in the automotive aftermarket

1. How important is branding in the automotive aftermarket
- Why is it important? Or not important.
2. Do you actively try to create a positive brand image, how much of a priority is this for the company?
- did you (as a company) start investing more into (digital) branding, essentially did you become aware of the importance of (digital) branding and why?
3. Is there an overarching message you are trying to send through your brand?

Common branding practices in the automotive aftermarket

4. Marketing practices, you, and your competitors for branding specifically.
- How you invested in branding, possibly any examples of branding campaigns that you have conducted
- Examples of branding campaigns other companies in the automotive aftermarket conducted
- The effectiveness of these different methods/branding campaigns
5. How do you deal with negative brand publicity, if this has happened how did you deal with it in the past, did this work? Maybe seen to other competitors
6. Have you ever participated in a form of co-branding? Have you ever explored the possibility of doing so? How did it go
7. How do you set your branding strategy?
- Do you follow the lead of OEM manufacturers? Use brand image of others? Look outside for guidance? Basically, where do you get the knowledge from?

Main stakeholders for branding in the automotive aftermarket

8. Which stakeholders are important to you when it comes to branding?
- Their roles?
- How do you ensure positive relations with business partners, does your brand play a role in this? Brand trust.
9. Do you have a good understanding of what customers expect from your company and how was this understanding created?
- Role of customer experience in branding
10. Your branding practices are they aimed mainly aimed at consumers, business relations (Upstream or downstream focus?). Balanced?
11. How do you stay updated in terms of branding and brand management?