



AAIA[®]
Automotive Aftermarket
Industry Association

AAIA Category Management Committee
April 2009
Huntington Beach

- BEAUTY
- COMMERCIAL TECHNOLOGY
- CONSUMER TECHNOLOGY
- ENTERTAINMENT
- FASHION
- FOOD & BEVERAGE
- FOODSERVICE
- HOME
- OFFICE SUPPLIES
- SOFTWARE
- SPORTS
- TOYS
- WIRELESS

Industry Progress

- Quick March Snapshot
- Category Release News
- Future Schedule
- Manufacturer Solicitation
- Service Developments

Four Application Categories Released

- Exhaust
- Gaskets
- Driveline
- Wiper Components





Hard Parts Category Release

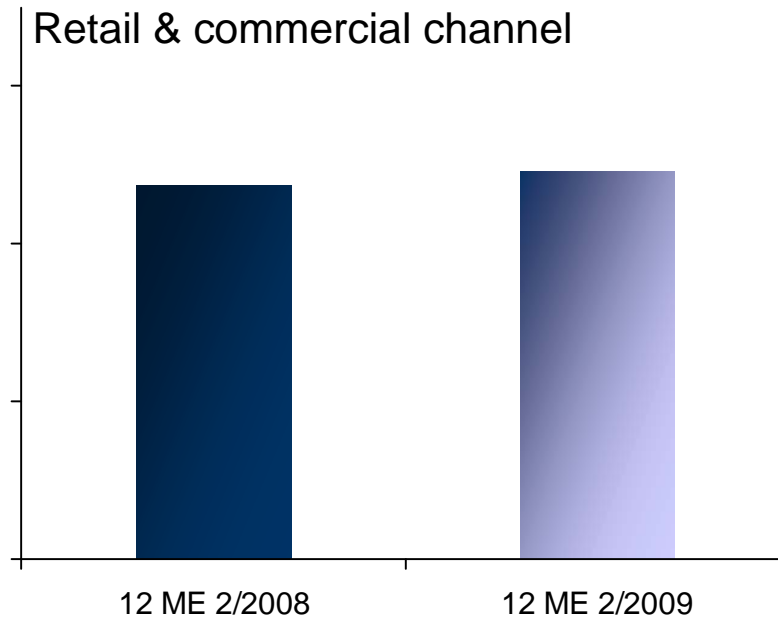


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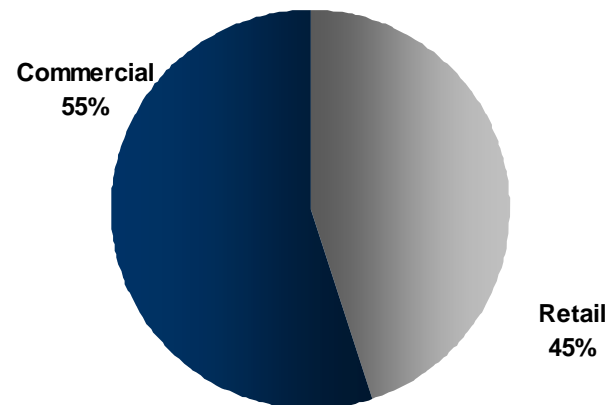
Exhaust Category Now Available

Tenth Application Category Released

- Nearly \$250MM in Sales Annually
 - Category, subcategory & segment
 - Retail & commercial channel



Retail / Commercial Split

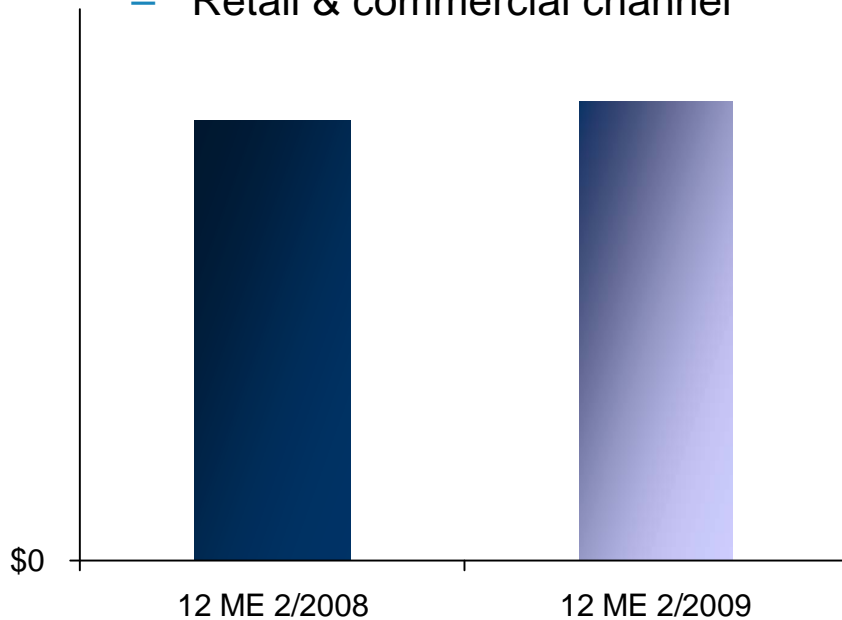


Category dollars +3.7% 12 ME 2/2009 vs. YAG
More Than 15 Segments Tracked

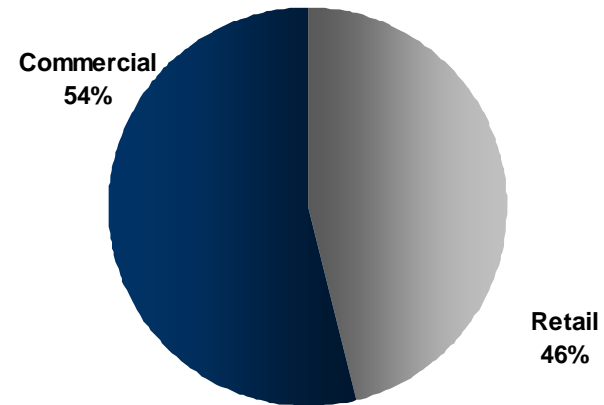
Gaskets Category Now Available

Eleventh Application Category Released

- Over \$300 Million in sales annually
 - Category, subcategory & segment
 - Retail & commercial channel



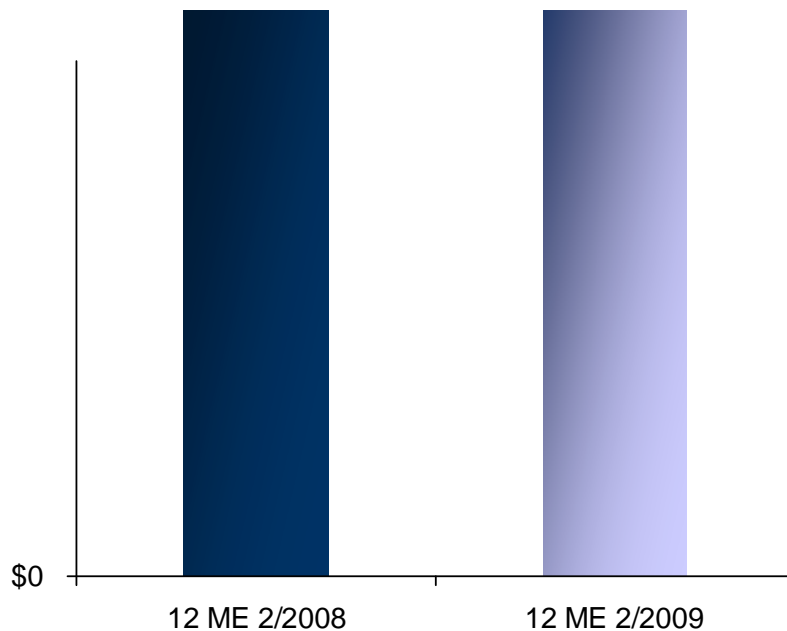
Retail / Commercial Split



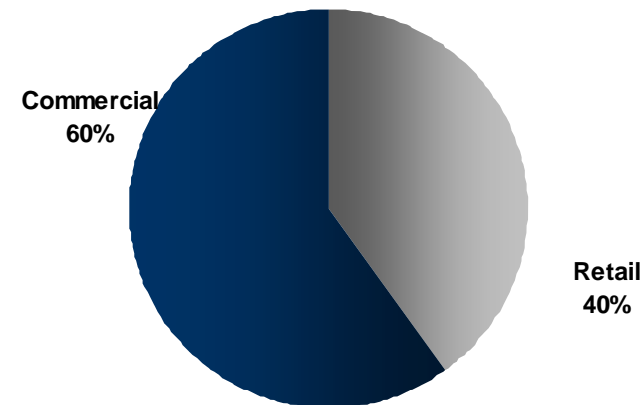
Driveline Category Now Available

Twelfth Application Category Released

- Over \$1 Billion in sales annually
 - Category, subcategory, segment
 - Retail & commercial channel



Retail / Commercial Split



Cooling Category Attributes Now Available

Scope of Current Information

- Water Pumps
 - New vs. Reman
 - Grade
- Heating Hoses
 - Grade
- Belts
 - Grade

Cooling Attributes Vendor Support

- CARQUEST
- Cardone
- Dayco
- Gates
- Veyance



Category Release Schedule

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Hard Parts Rollout Schedule

Estimated Release Timeline

Re-released Categories

Rotating Electrical	April, '07
Batteries	July, '07
Brakes	August, '07
Filters	October, '07
Fuel Systems	November, '07
Cooling	February, '08
Hierarchy Upgrade	March Data
Suspension	May '08
Steering	June '08
Climate Control	August '08
Exhaust	September '08
Gaskets	November '08
Driveline	January, '09

Previously Unreleased Categories

Wiper Components	February, '09
Hierarchy Upgrade	February, '09
Application Electrical	April, '09
Ignition	July '09
Emission	September '09
Engine	December, '09



Manufacturer Solicitation Process

Process is Working Effectively

- AAIA Committee Chairmen communication
- More formal retailer support
- More procedure in the follow up process
- Request for manufacturer data
 - Electronic files with required fields
 - Less manufacturer resolution
- Longer lead times
 - But maintaining timelines



Next Milestones

- Eight categories released in last 12 months
- **Application Electrical** to be released 1 month early
 - Delivery with March data in April
- Solicitation to begin for remaining categories
 - Emission
 - Ignition
 - Engine
- Attributes will be part of re-release over time, dependent upon industry feedback



Retailer / Distributor Data Audit

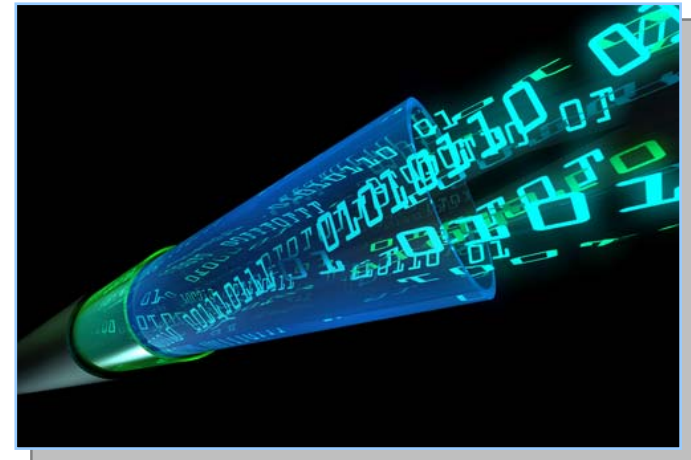
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NPD
GROUP
Behind Every Business Decision

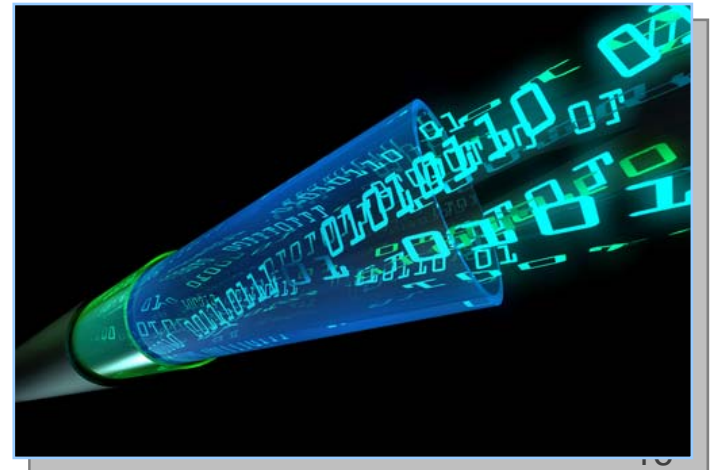
Collaborative Opportunity

- Hard parts Solicitation Process revealed an opportunity to better our Retailer Data Feeds
 - Additional fields
 - Improved descriptions
- NPD's retail team has been conducting Retailer Audits in 2009
 - Completed with 5 participants
- Critical for service maintenance and development



What Have We Learned?

- NPD has initiated continuous improvement projects with 4 of the panel members audited
- Our goals include:
 - Identifying improvements from the quality of existing data points.
 - Receiving additional data points to help better identify the items sold which will improve coding and attribute accuracy
 - Receiving new data points for future services such as
 - Items on promotion
 - Shelf price vs. sales price
 - Warranty information, etc.





Service Updates

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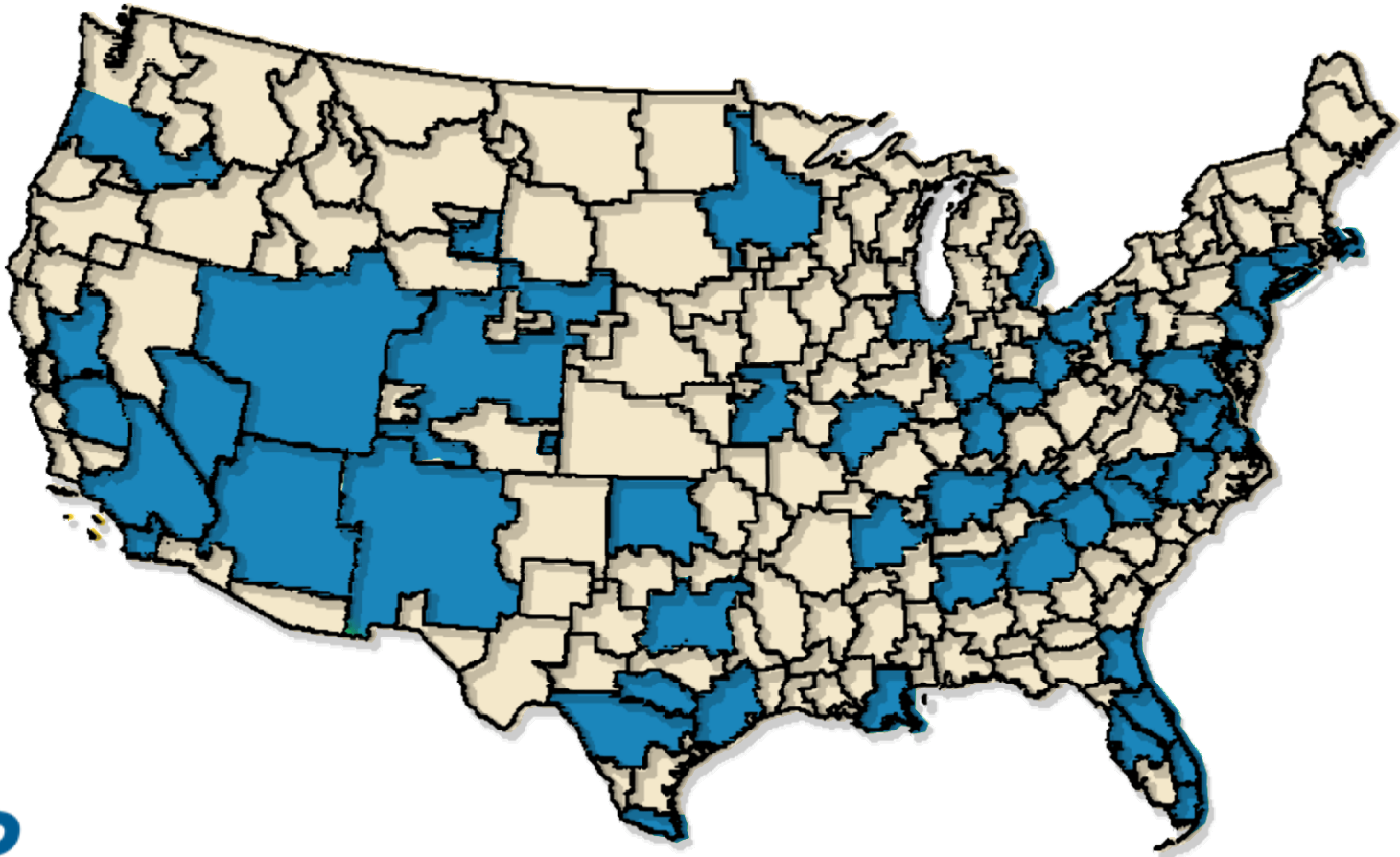
Application Category Enhancements

Additional Value on Parts Reporting

- Now reporting same structure for all categories
 - Retail, Commercial and Total
 - New Measures
 - Standard Geographies
 - 7 Regions
 - Enhanced Geographies
 - 50 DMA's
 - Custom Geographies



Now Delivered for Application Categories



Now Delivering Retailer Trading Areas



Custom Geographies

Solution Folder Enhancements

Delivery Tool Improvements

- All categories & reports from one view
- Improved long running report feature
- Dynamic brand list in categories
- Flat file options for all item level reports



New Deliverable on Total Store Data

- Early Indicator Report is discontinued
- Replaced with Category Overview Report
 - Industry needs have changed
 - New deliverable provides cleaner classification
- Delivered on day 18
- Matches the AAIM data of record which is delivered 1 week later

What's On The Horizon?

- Channel expansion
- Future Hard Parts Reporting
 - Inventory?
 - Interchange?
 - Other value positions for Hard Parts

In Closing

- Hard Parts rollout ahead of schedule
- Strong industry support
- Opportunity in data quality improvement
- Building additional value
 - Store level data
 - Advanced analytics
- Ongoing development



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