



Final Report

## ***Collision Repair Market Survey***

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***April 28, 2014***

***Timothy Morgan, ETI VP of Marketing, Collision Group Chairman***

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DETROIT • CHICAGO • FRANKFURT • SHANGHAI • BEIJING

## **Objectives/Methodology**

Shop Demographics

Type and Brands of Vehicles Repaired

Training, Programs, and Information

Equipment Utilized and Purchased

Late Model Repair and Additional Issues

Summary of Findings

# Research Objectives

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**Primary Objective:** To gather data regarding the types of repairs performed in shops, types of vehicles repaired, programs, equipment and tools utilized and purchased for those repairs.

**Report data on the following:**

- Demographics and current environment
- Type and brands of vehicles repaired
- Training, programs and information utilized
- Repair equipment utilized and purchased
- Late model repairs and additional issues
- Data segmented by EMI versus EMI PR and by Type of Shop

# Methodology

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**Sponsor: Equipment Tool Institute**

**Survey Instrument: Email format with a total of 44 questions**

**Incentive: Drawing for Apple iPad Air or a Samsung Galaxy Note 10.1**

**Client provided respondent list**

## Respondent Sample

Total	Respondent List		Type of Shop		
n=176	ETI (n=144)	ETI PR (n=32)	Franchise Repair Shop (n=2)	Independent Repair Shop (n=144)	New Car Dealer (n=30)

Objectives/Methodology

**Shop Demographics**

Types and Brands of Vehicles Repaired

Training, Programs, and Information

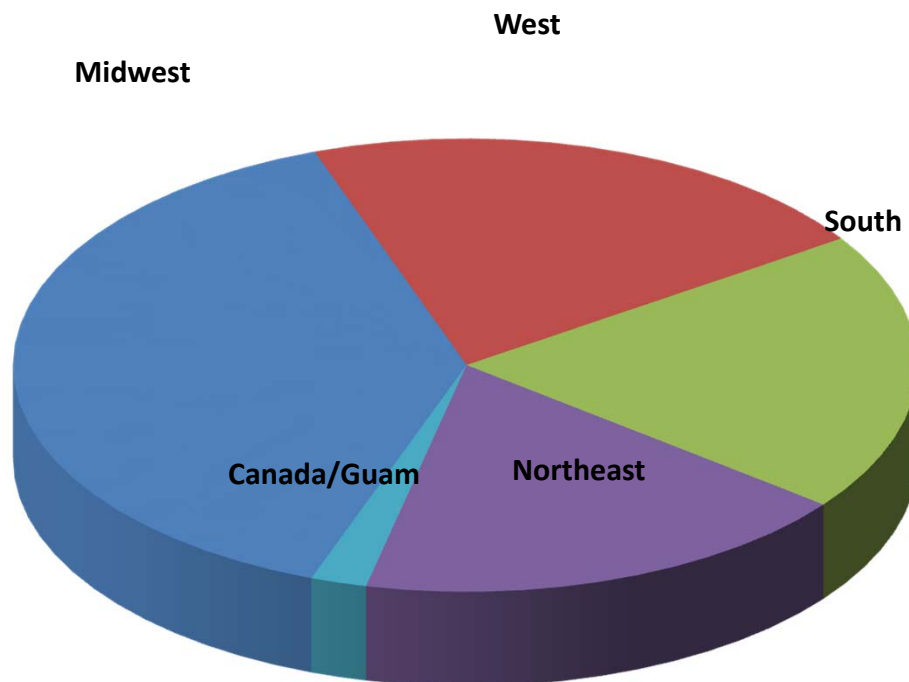
Equipment Utilized and Purchased

Late Model Repairs and Additional Issues

Summary of Findings

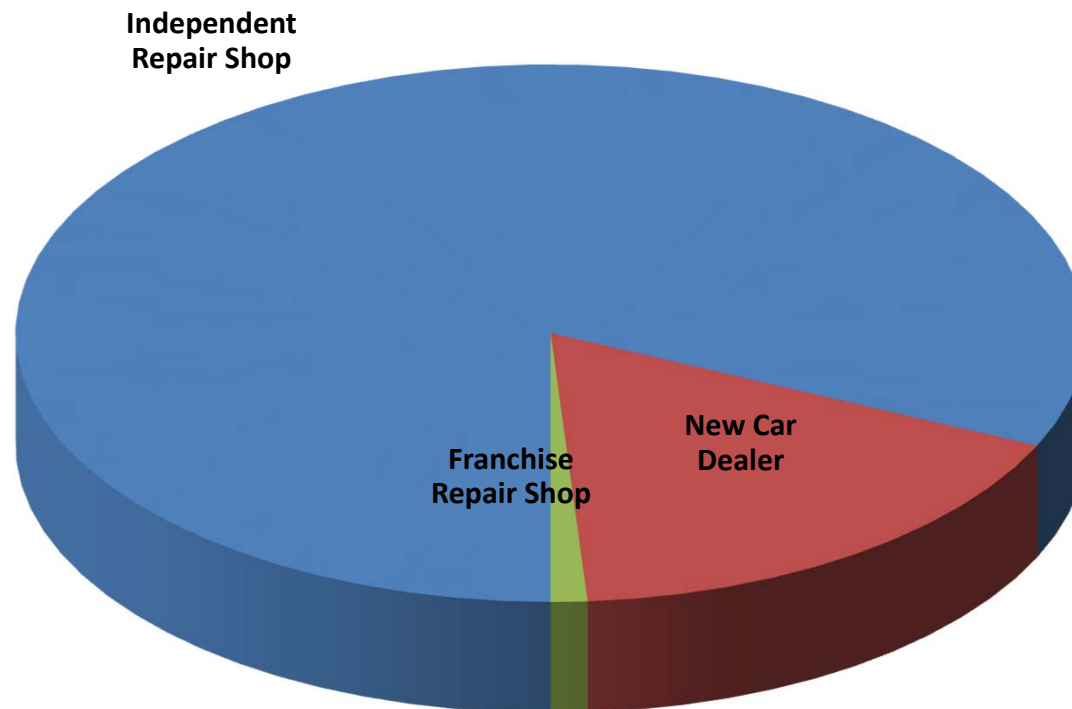
## Breakdown By Region

Q1: What is your shop's zip code?



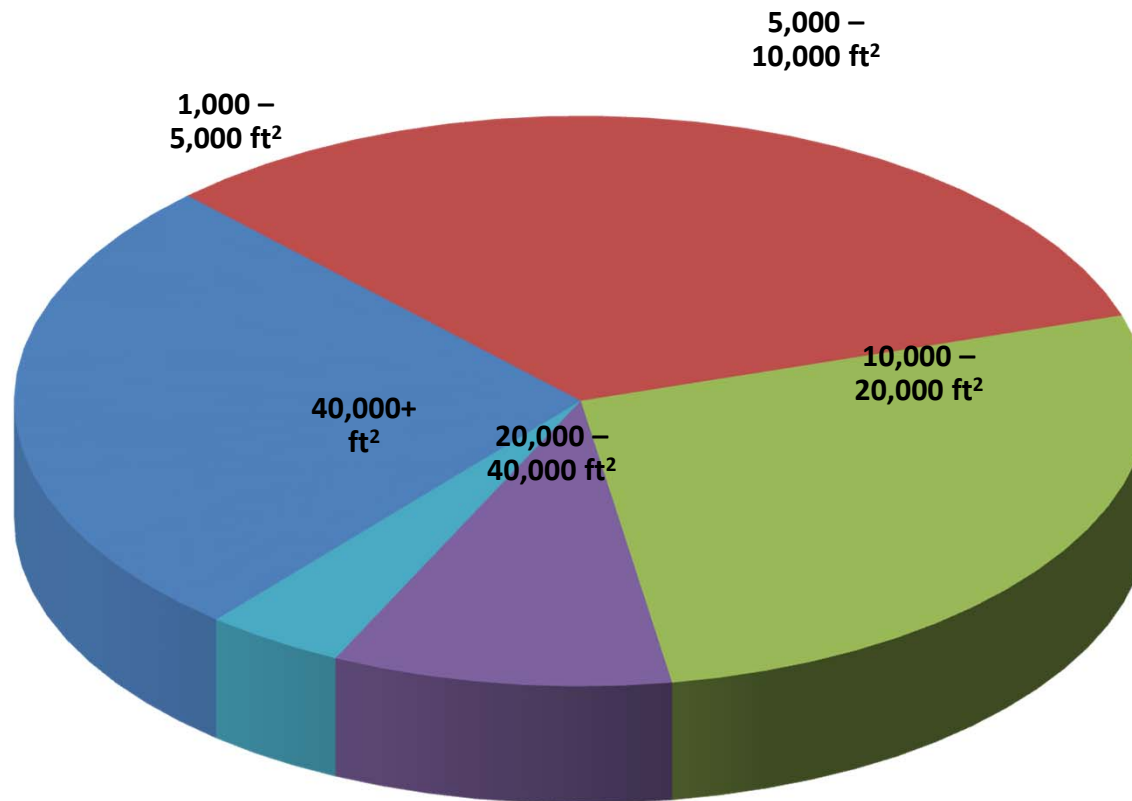
# Shop Profile

Q2: Which of the following best describes your shop?



# Shop Square Footage

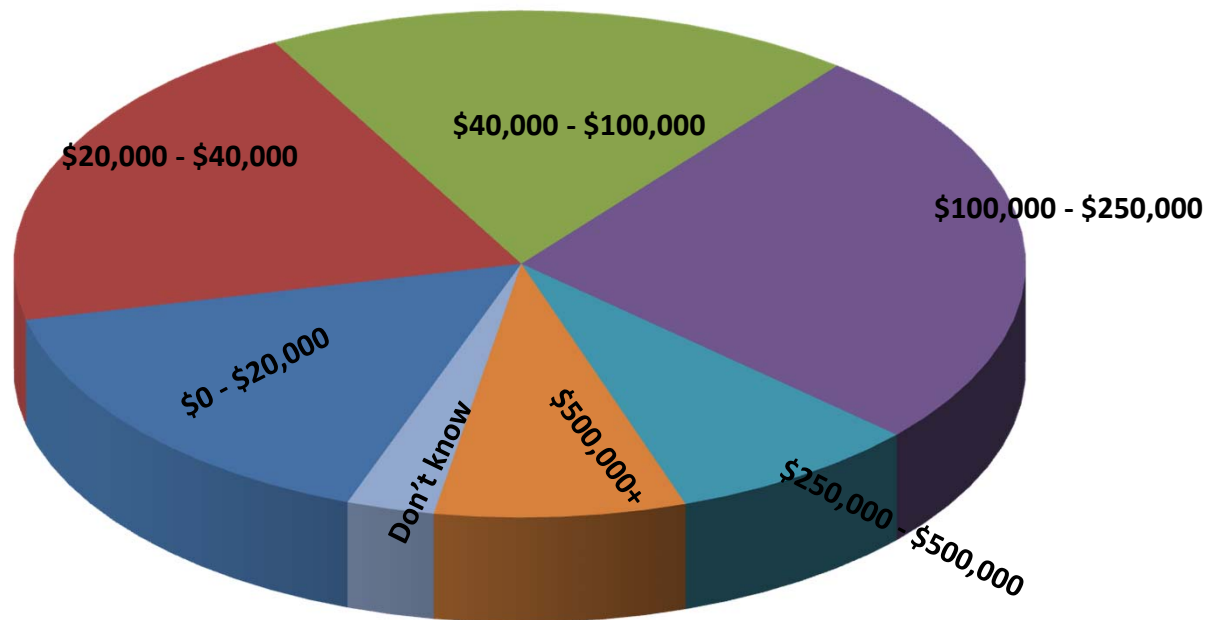
Q3: What is the square footage of your body shop, excluding front office?





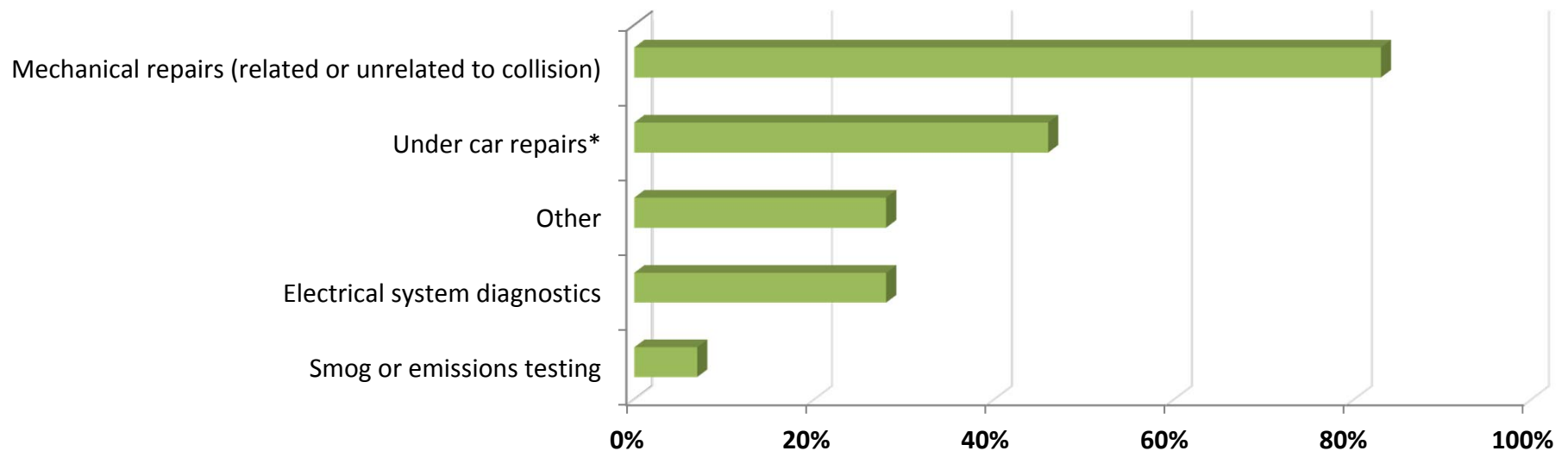
# Monthly Revenue

Q5: On average, what is your shop's gross monthly revenue?



# Types of Repairs Offered

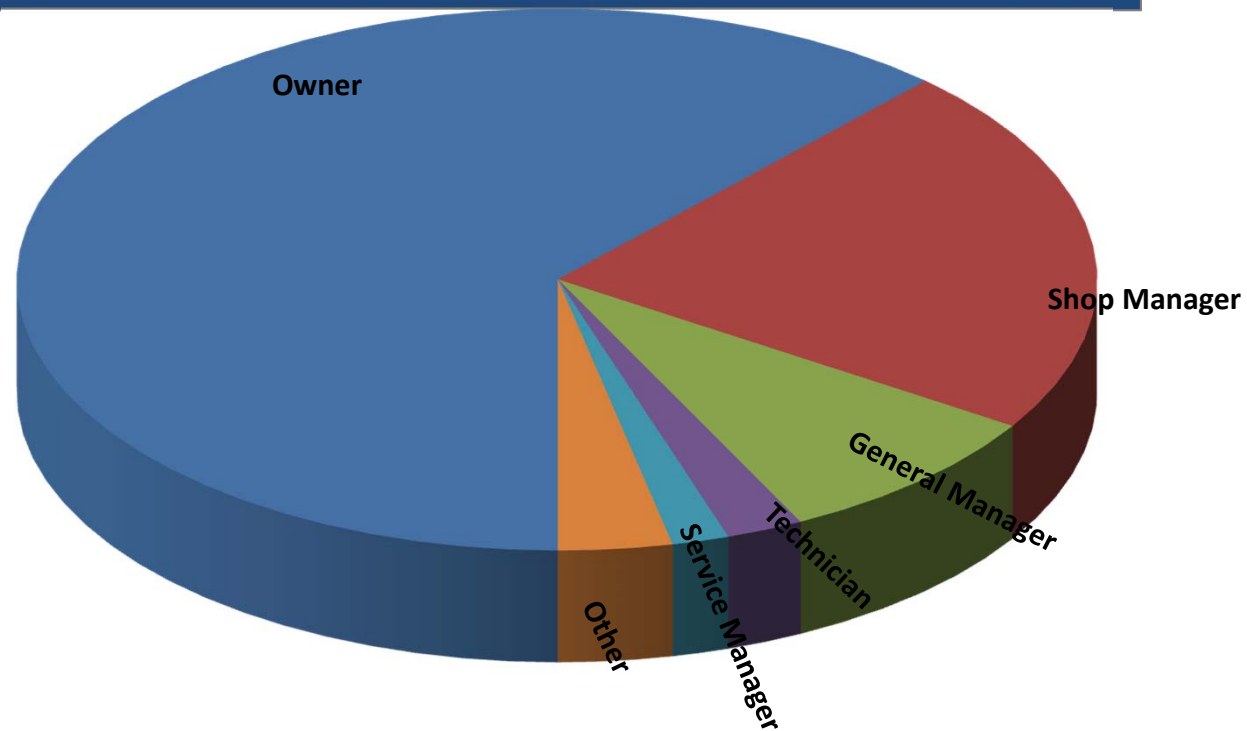
Q6: Besides body work, what other repair work does your shop do?



Answers for "other" : Glass , Restoration, Detail , Air conditioning, Accessories

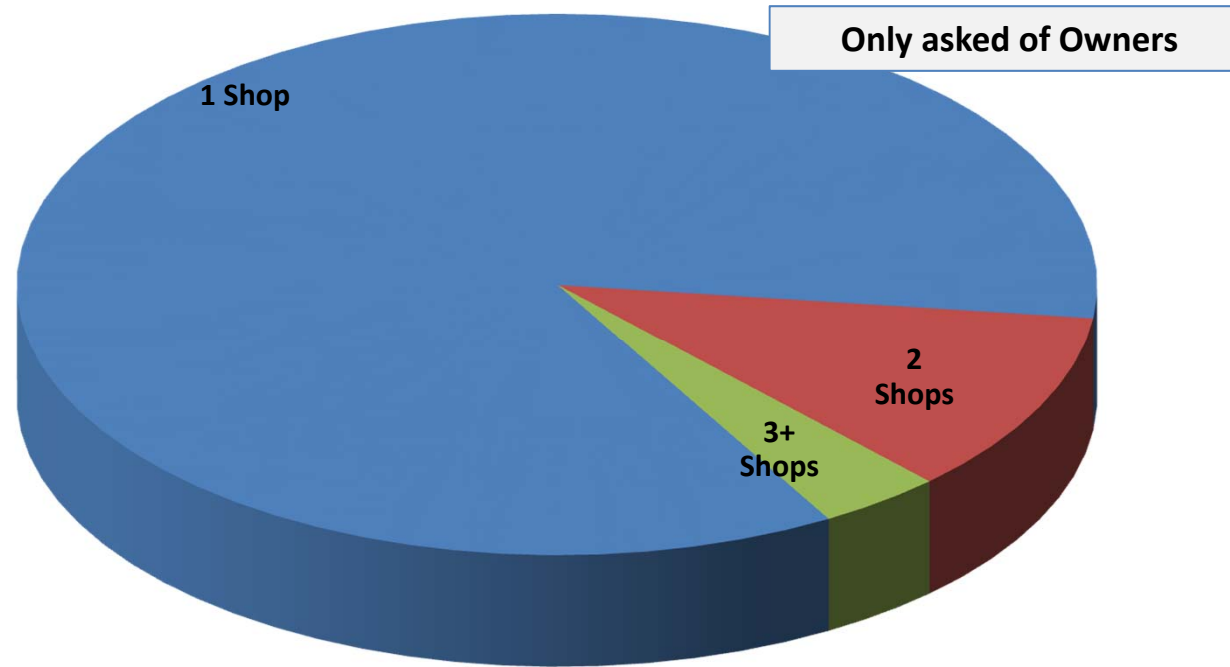
# Respondent Profile

Q7: Which of following best represents your position in the company?



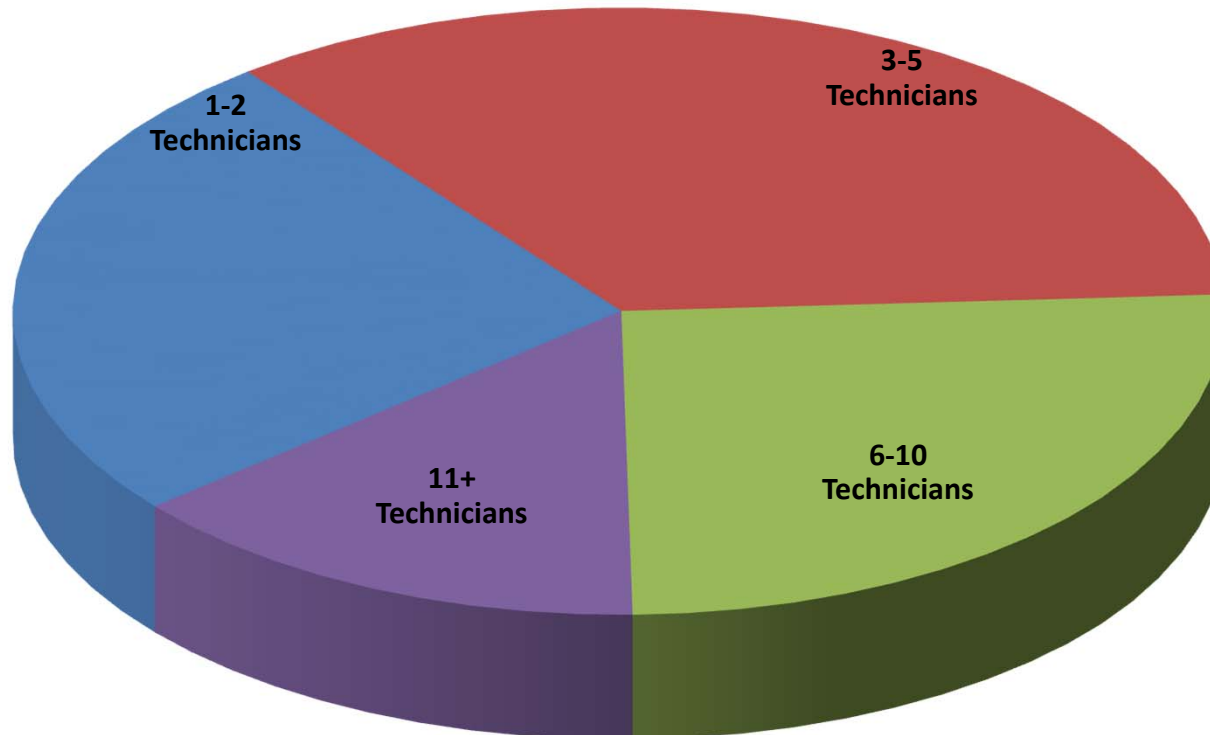
## Number of Shops Owned

Q8: How many shops to you own? Open-End



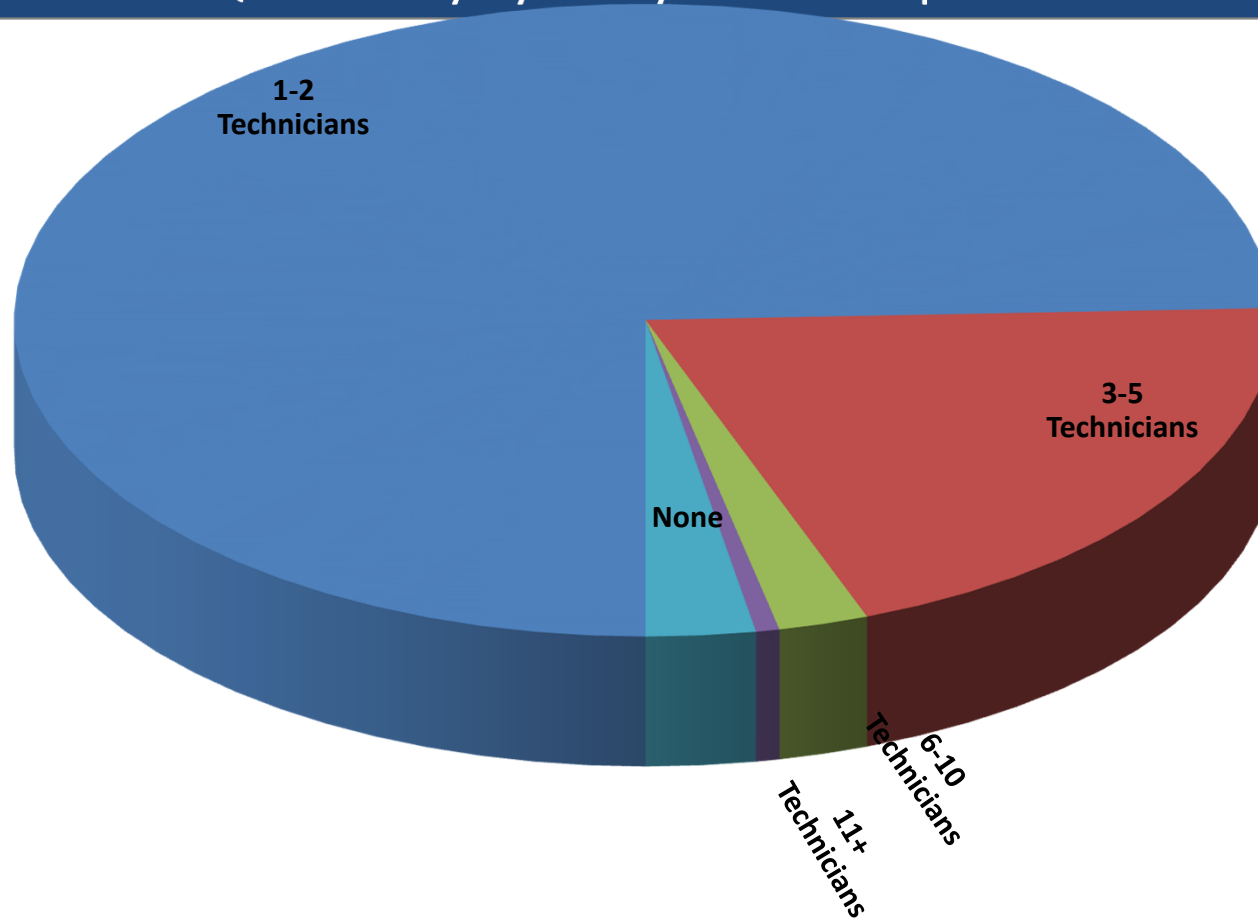
## Number of Technicians Employed

Q9: How many body technicians are working in your shop?



## Number of Body Technicians Who Are Also Painters

Q10: How many of your body technicians are painters?



Objectives/Methodology

Shop Demographics

**Type and Brands of Vehicles Repaired**

Training, Programs, and Information

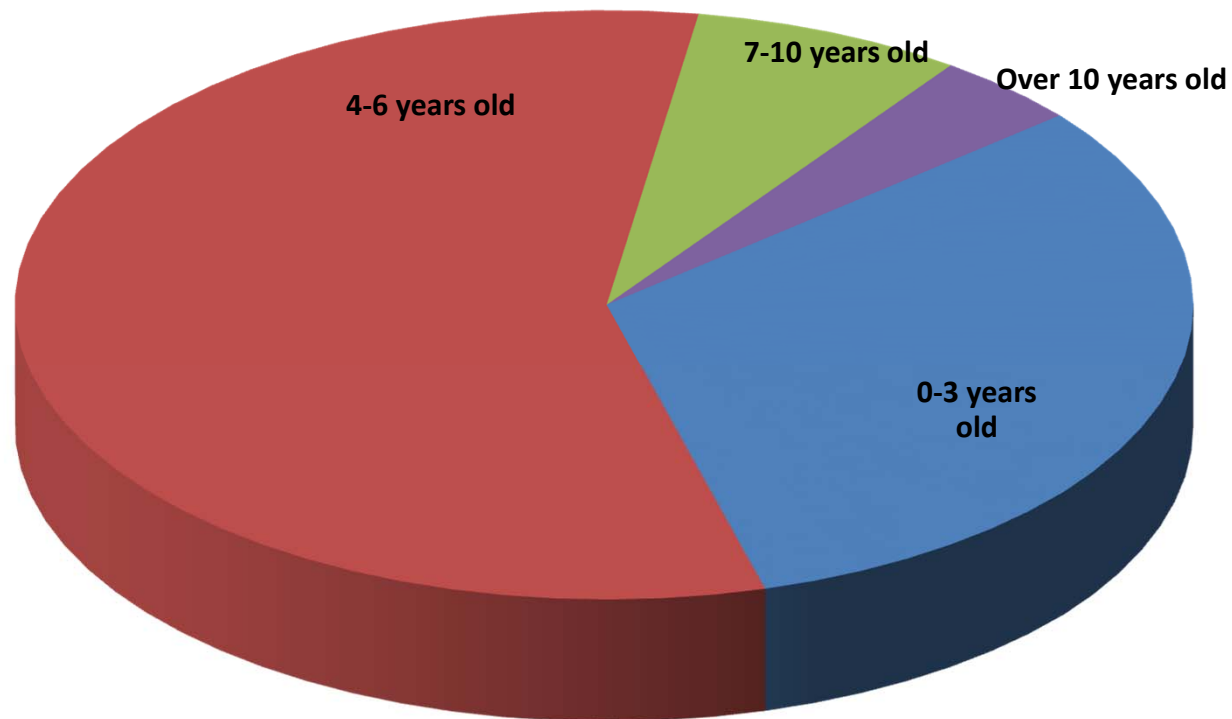
Equipment Utilized and Purchased

Late Model Repairs and Additional Issues

Summary of Findings

## Age of Vehicles Worked on

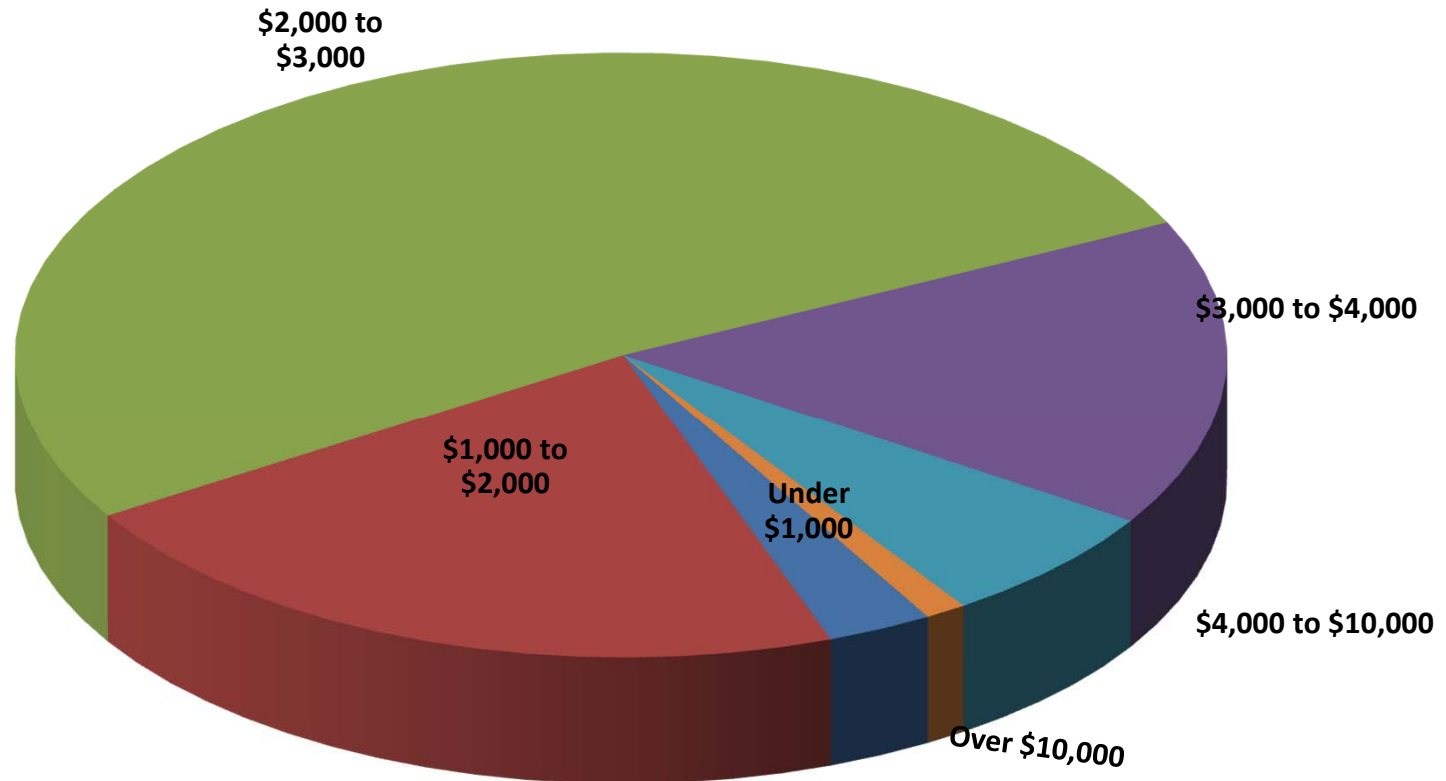
Q11: What is the average age of vehicles your shop works on?





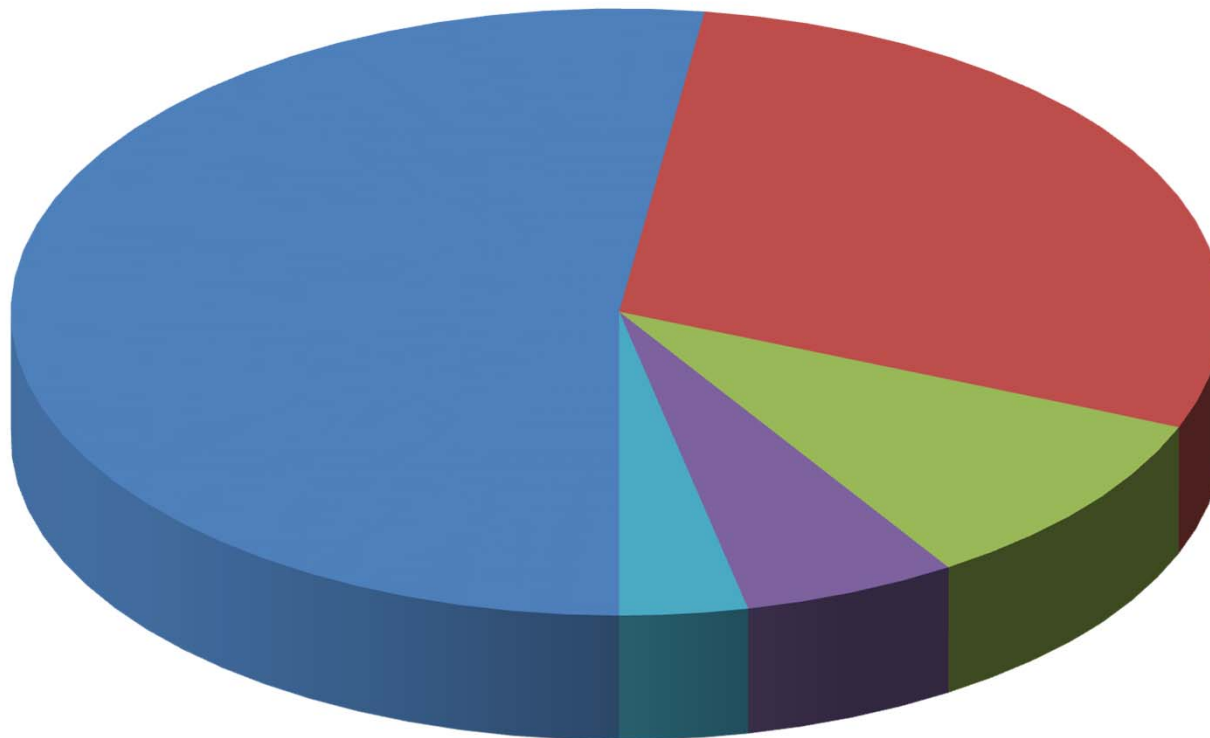
## Vehicle Repair Size in Dollars

Q12: What is the average vehicle repair estimate size in dollars?



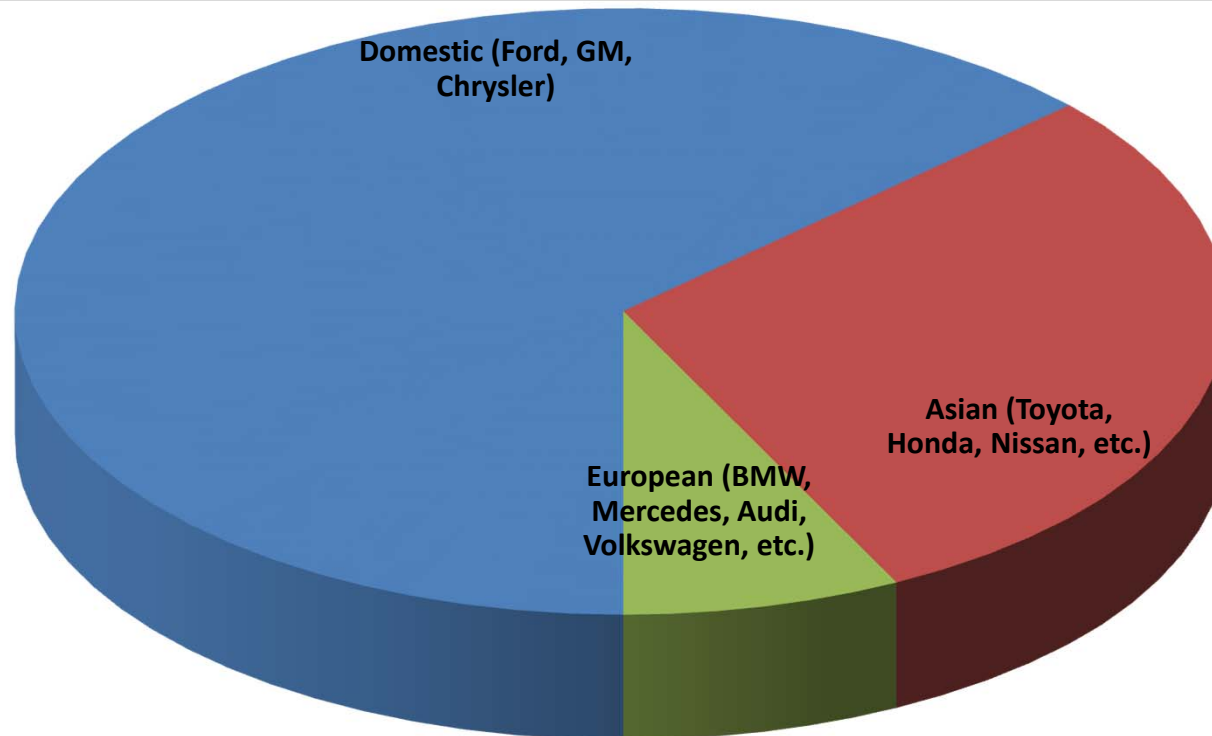
## Full Frame Vehicles Worked on

Q13: What percentage of the vehicle your work on are full frame?



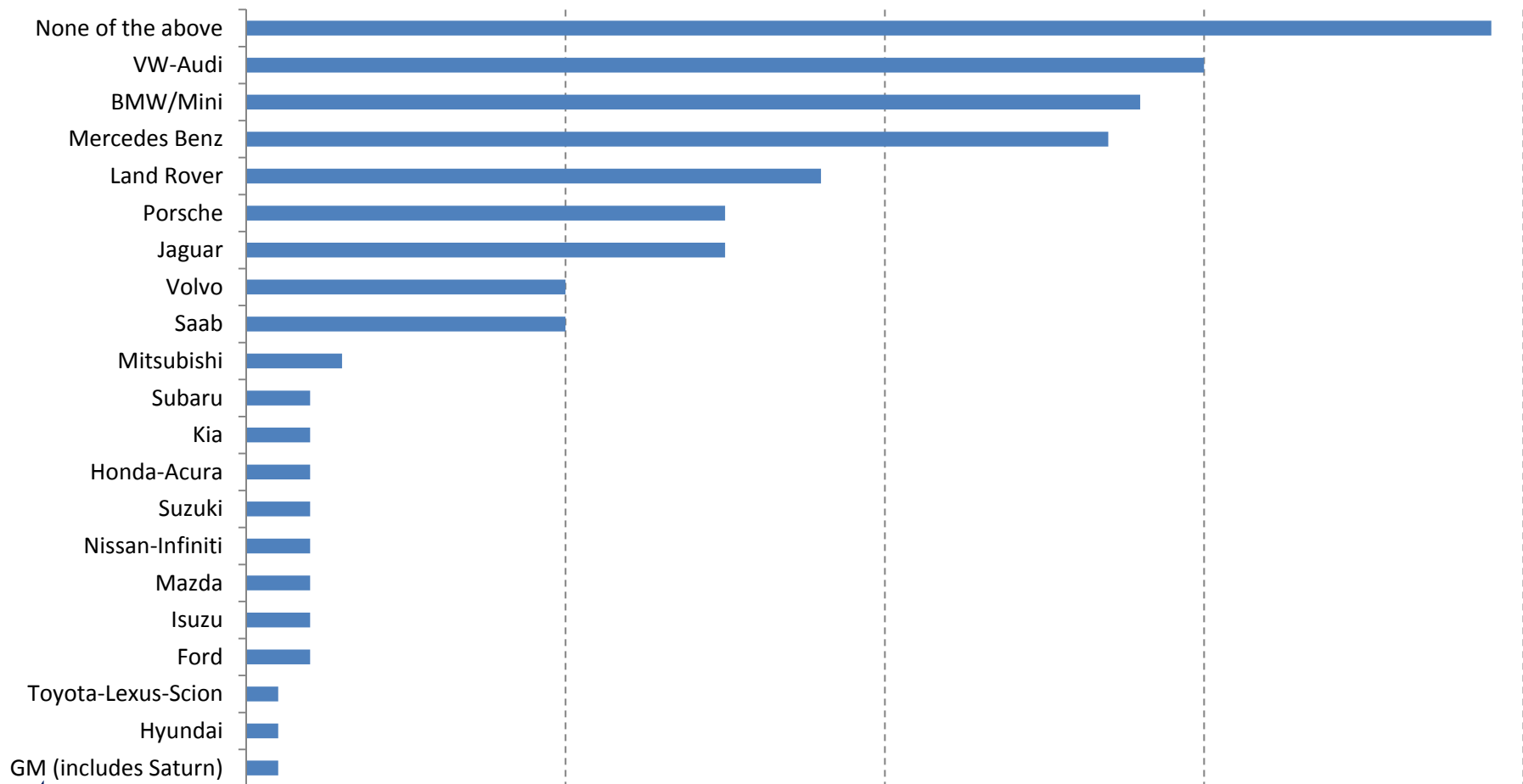
## Groups of Vehicles Worked On

Q14: Which of the following groups of vehicles do you work on the most?



## Brands of Vehicles That Are Difficult to Repair

Q16: Please indicate any brands that you find particularly difficult to perform repairs on.



Asked only of those that they performed repairs on in Q15

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## Why Are These Brands Difficult to Repair

### Q16a. What do you find is difficult to repair on the following brands?

	% of Total Indicating Difficulty	Responses (Coded)	
	30%	<ul style="list-style-type: none"> <li>• Complex Design (10)</li> <li>• Over engineered (8)</li> <li>• Parts availability (7)</li> <li>• Hard to reach areas (7)</li> </ul>	<ul style="list-style-type: none"> <li>• Electrical/electronics (5)</li> <li>• Tools required (3)</li> <li>• OEM information (3)</li> </ul>
	28%	<ul style="list-style-type: none"> <li>• Parts availability (13)</li> <li>• Access to information (10)</li> <li>• Electrical (7)</li> </ul>	<ul style="list-style-type: none"> <li>• Design/technology (5)</li> <li>• Over engineered (5)</li> </ul>
	27%	<ul style="list-style-type: none"> <li>• Complex design/ technology (14)</li> <li>• Parts availability (9)</li> <li>• Access to information (7)</li> </ul>	<ul style="list-style-type: none"> <li>• Over engineered (5)</li> <li>• Electrical (4)</li> <li>• Frame set-up (2)</li> </ul>
	18%	<ul style="list-style-type: none"> <li>• Parts availability (13)</li> <li>• Design (5)</li> </ul>	<ul style="list-style-type: none"> <li>• OEM information (3)</li> <li>• Aluminum (3)</li> </ul>
	15%	<ul style="list-style-type: none"> <li>• Parts availability (8 )</li> <li>• Complex (7)</li> <li>• OEM information (3)</li> <li>• Over engineered (3)</li> </ul>	<ul style="list-style-type: none"> <li>• Tight space (2)</li> <li>• Electrical (2)</li> <li>• Scan tool (2)</li> </ul>
	15%	Design (12) Parts availability (8)	

Objectives/Methodology

Shop Demographics

Type and Brands of Vehicles Repaired

**Training, Programs, and Information**

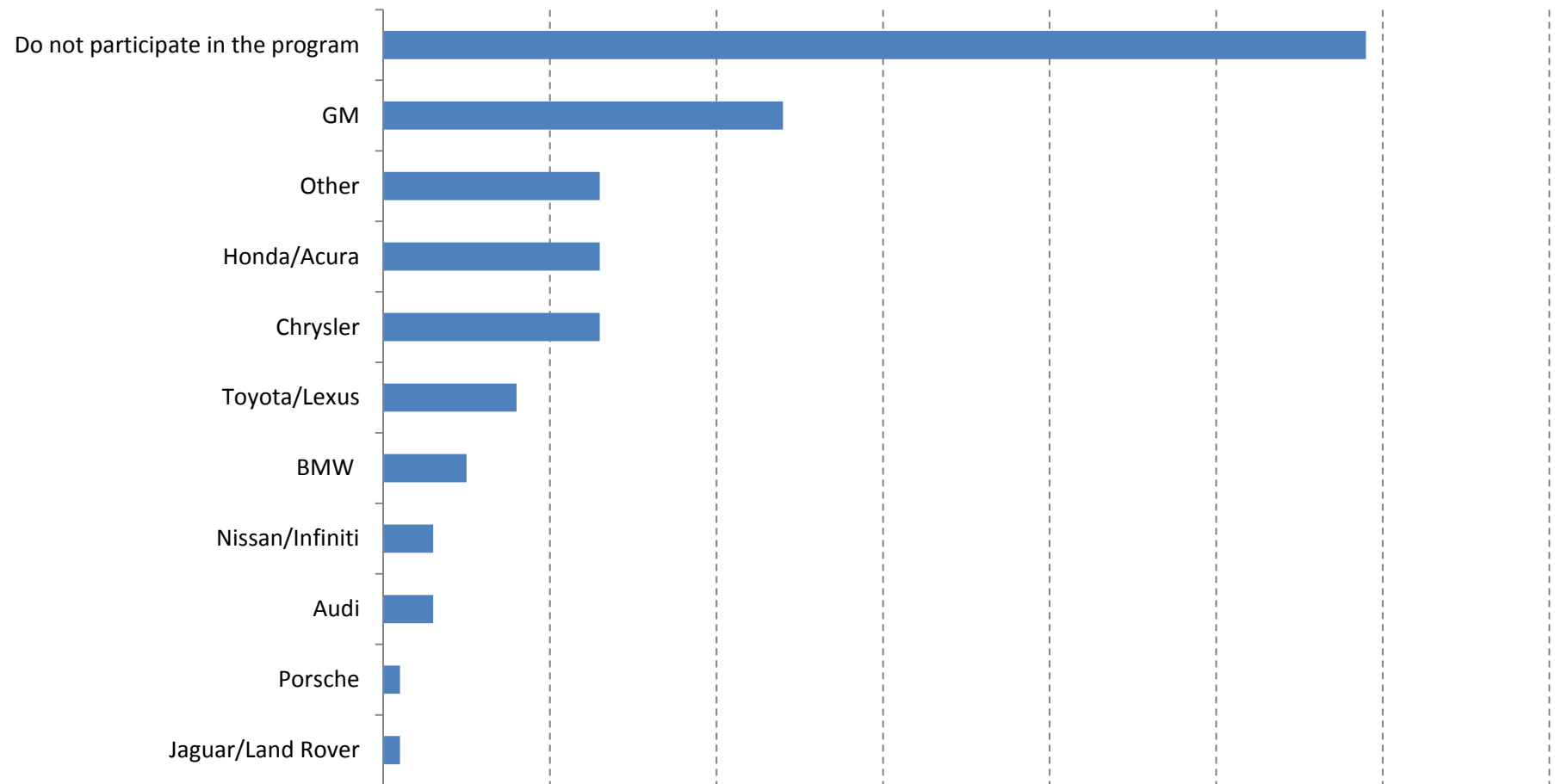
Equipment Utilized and Purchased

Late Model Repairs and Additional Issues

Summary of Findings

# OEM Certified Collision Repair Programs

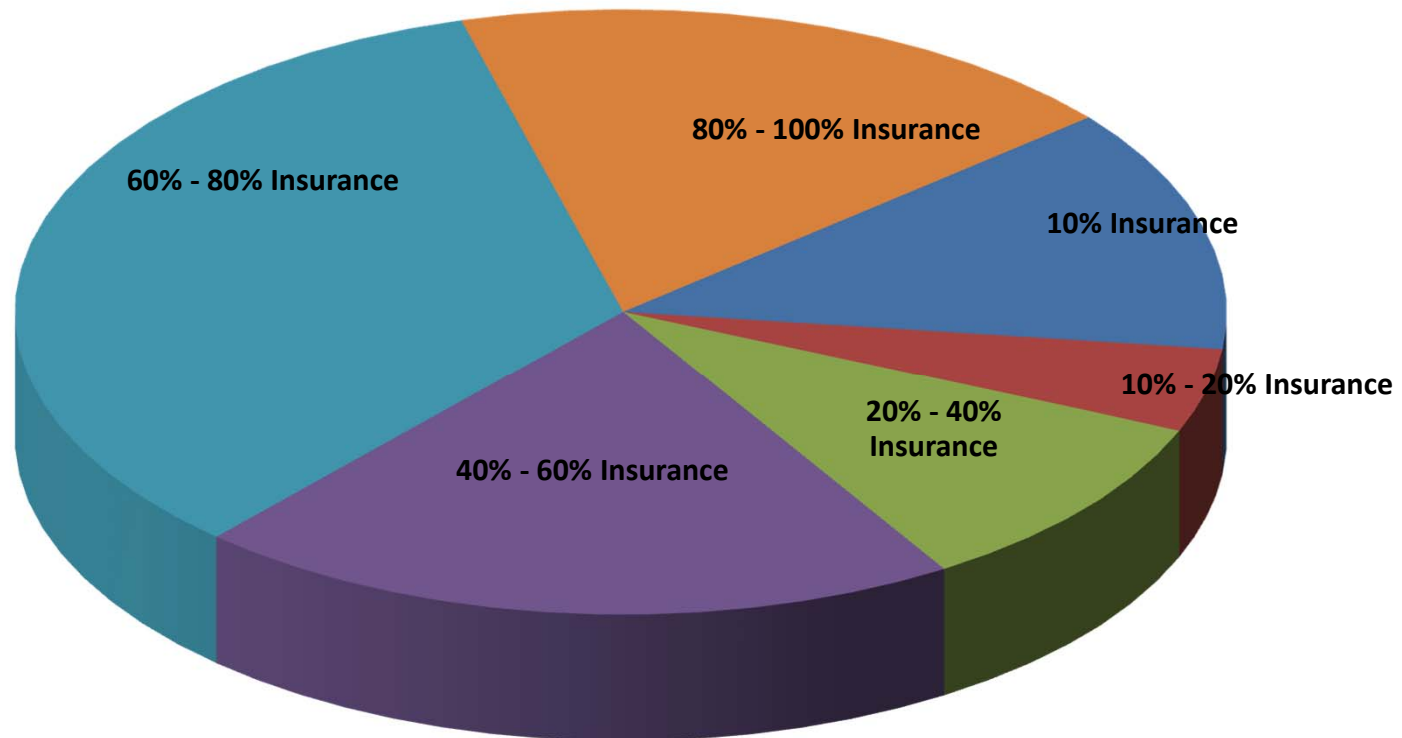
Q17: Do you participate in a certified collision repair shop program from an OEM?



Top Answers for "other" Ford , Mercedes Benz,  
Volkswagen , I-CAR

## Insurance Provided Work Versus Consumer Work

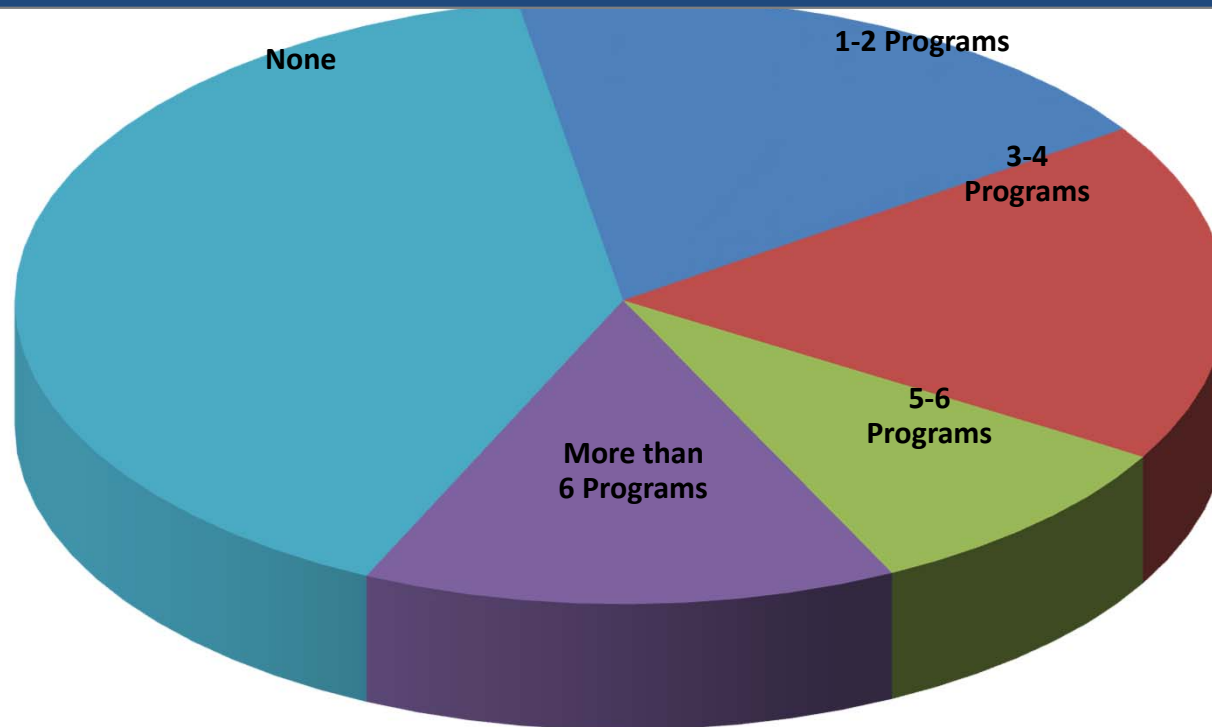
Q18: What is the average blend of your repair business between insurance provided work and consumer work?





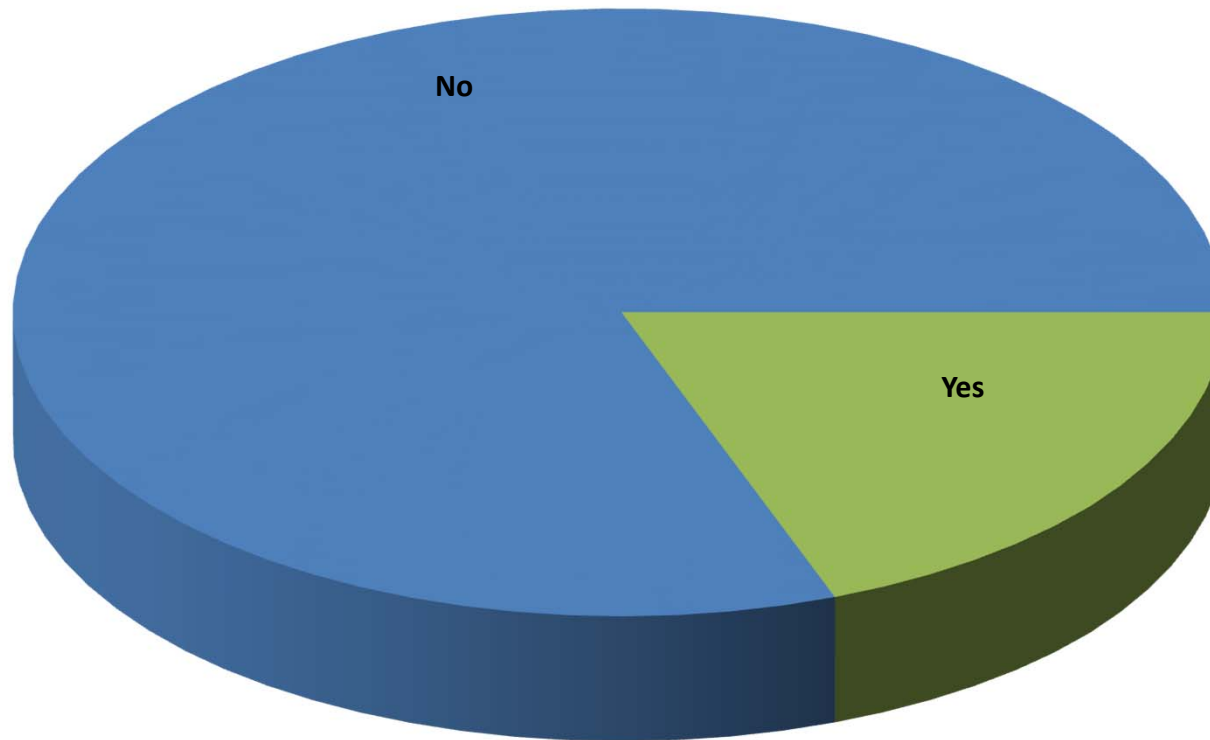
# Insurance Direct Repair Programs and/or Preferred Repair Options

Q19: How many insurance Direct Repair Programs (DRP's) or Preferred Repair Option (PRO) Programs does your shop participate in?



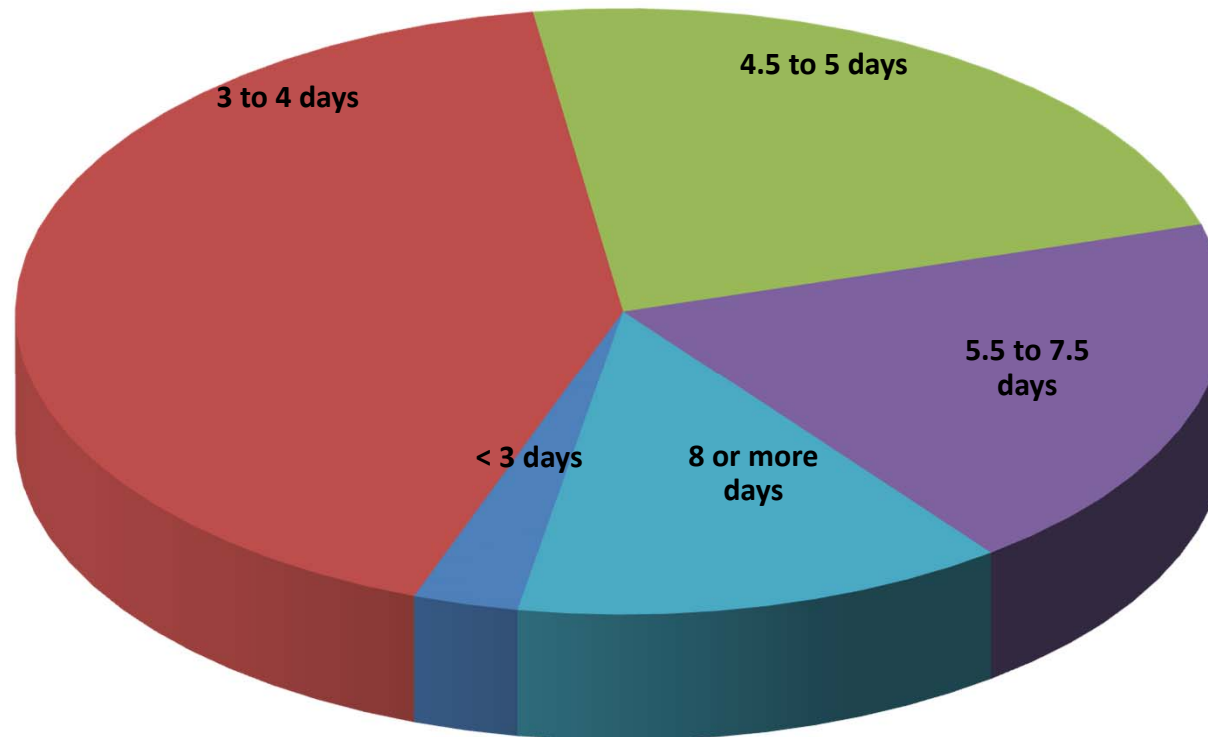
## Membership in Industry Groups

Q20: Are you an active member of an industry group, such as "Twenty" Group?



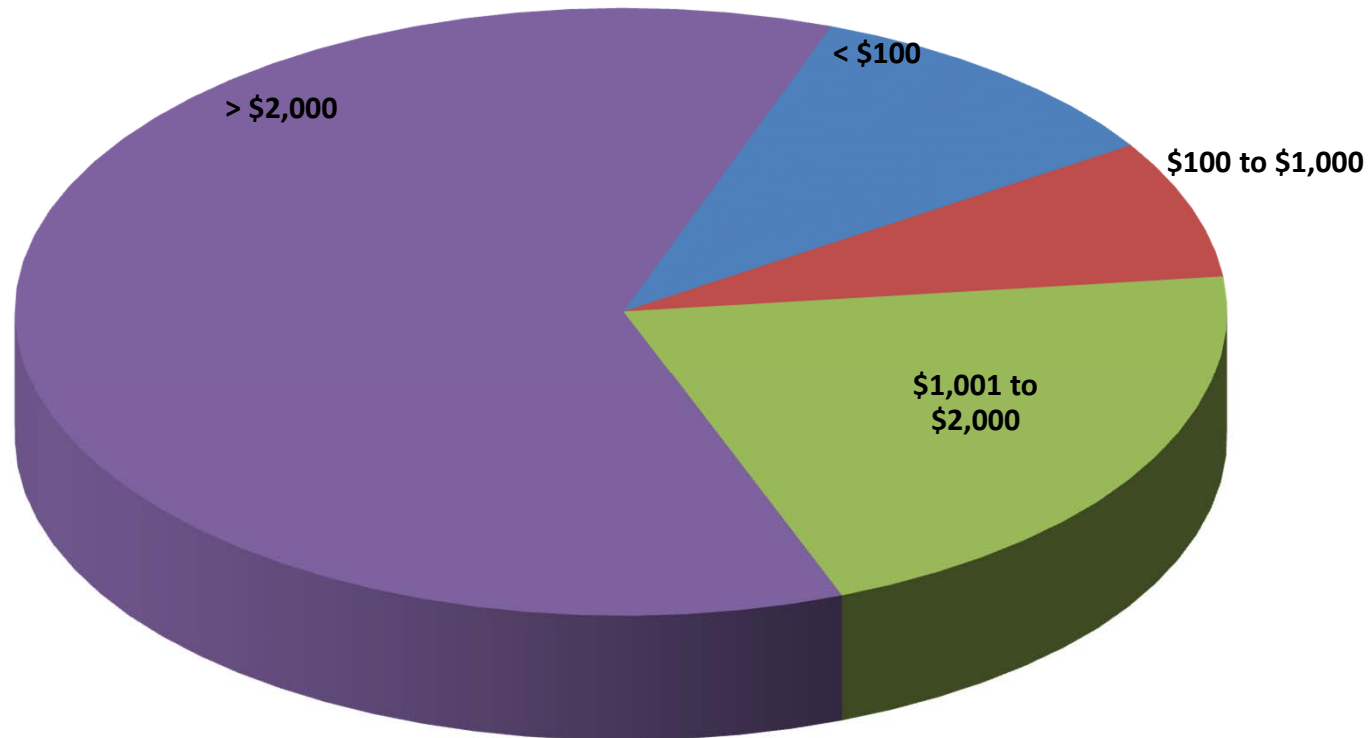
## Repair Cycle in Days

Q21: What is your average repair cycle time in days? Open-End



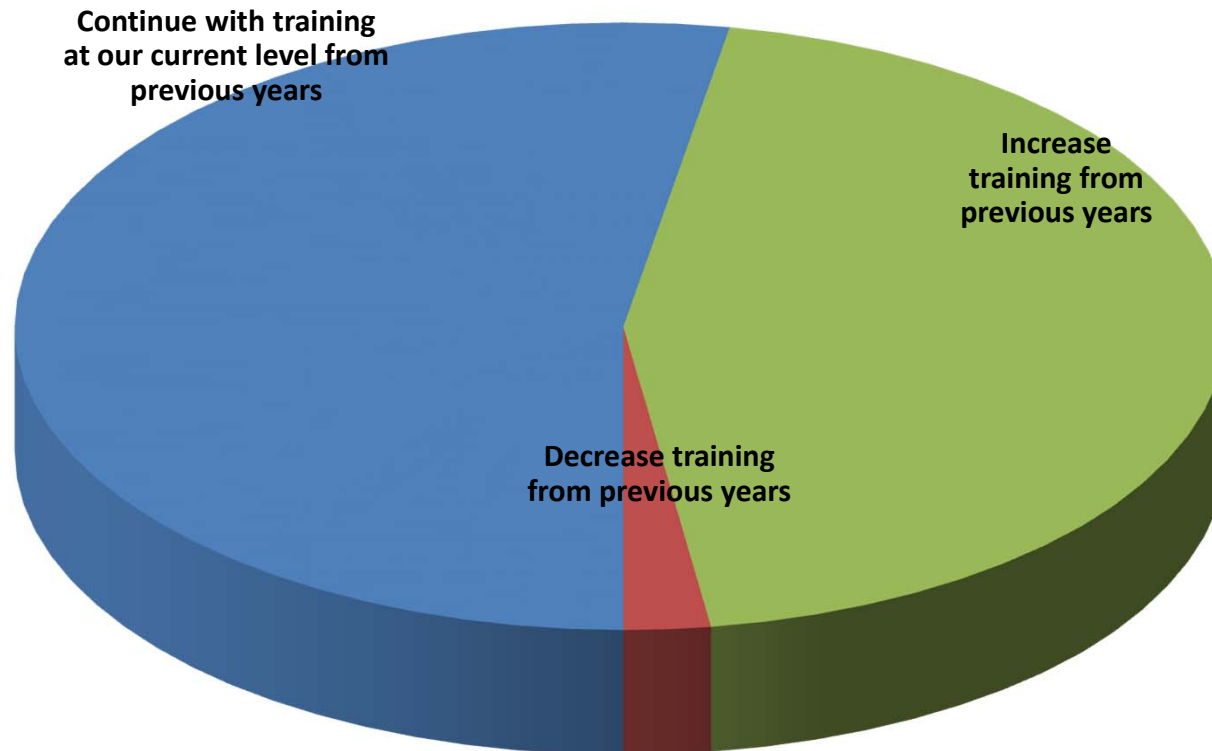
## Severity Per Repair in Dollars

Q22: What is your average severity per repair in dollars? Open-End



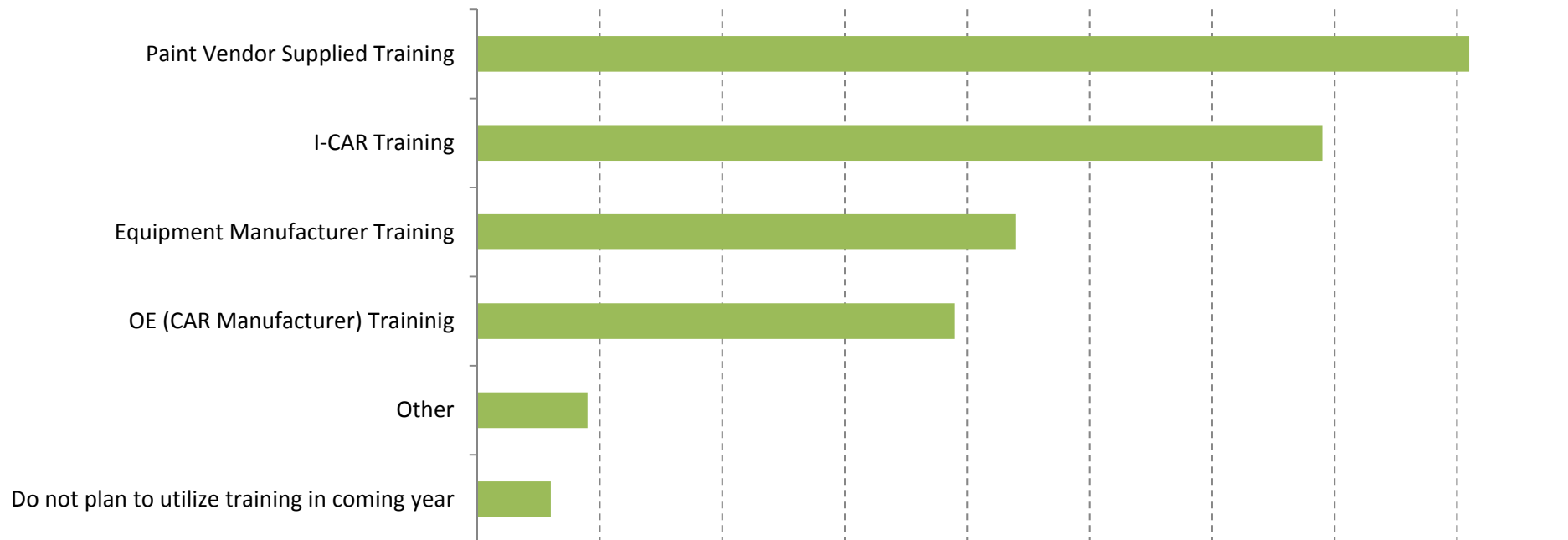
## Training Plans for Upcoming Year

Q23: What best describes your training plans for the coming year?



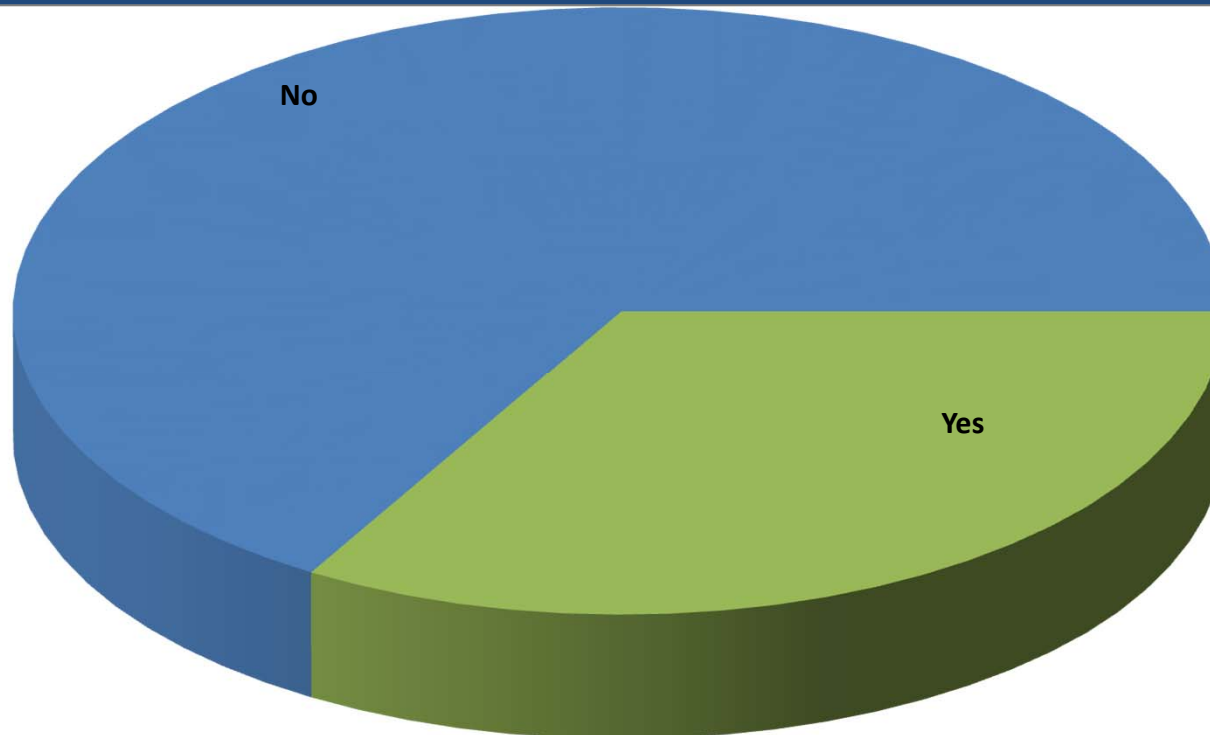
## Utilization of Training Providers for Upcoming Year

Q24: My shop plans to utilize training supplied by the following training providers in the coming year:



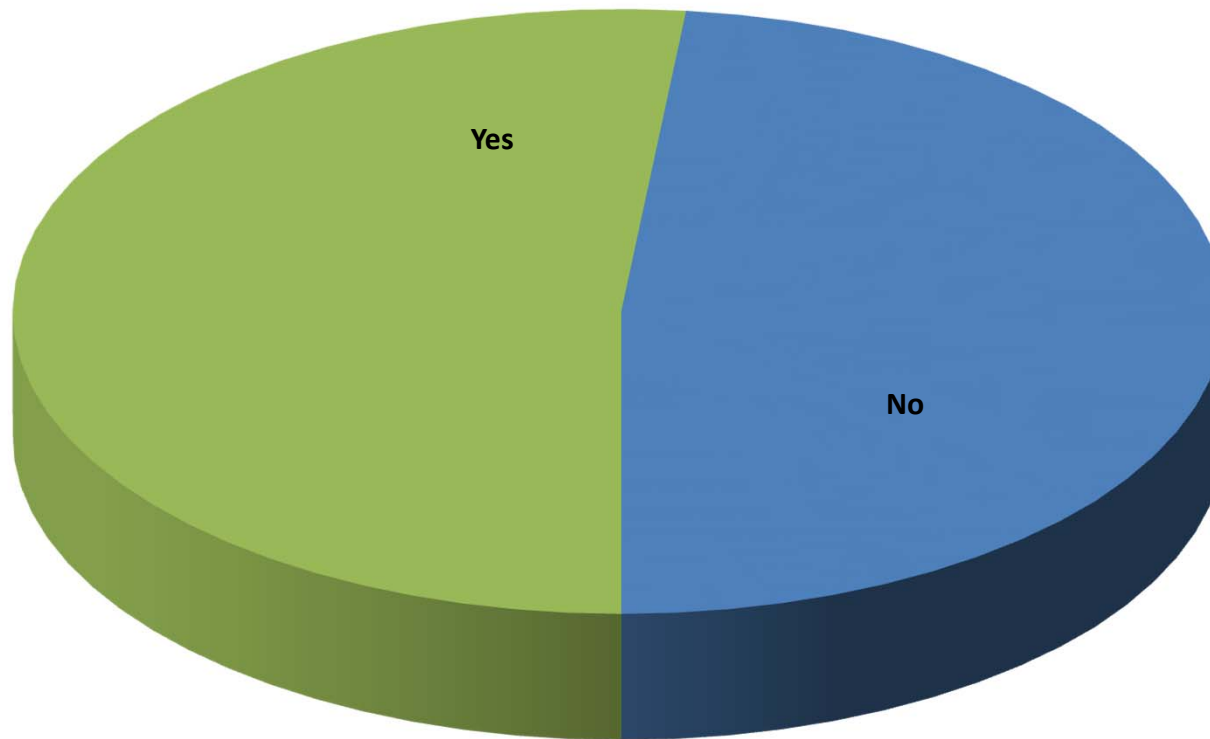
## Shop I-CAR Gold Certified

Q25: Is your shop currently I-CAR Gold certified?



## Technicians ASE Certified

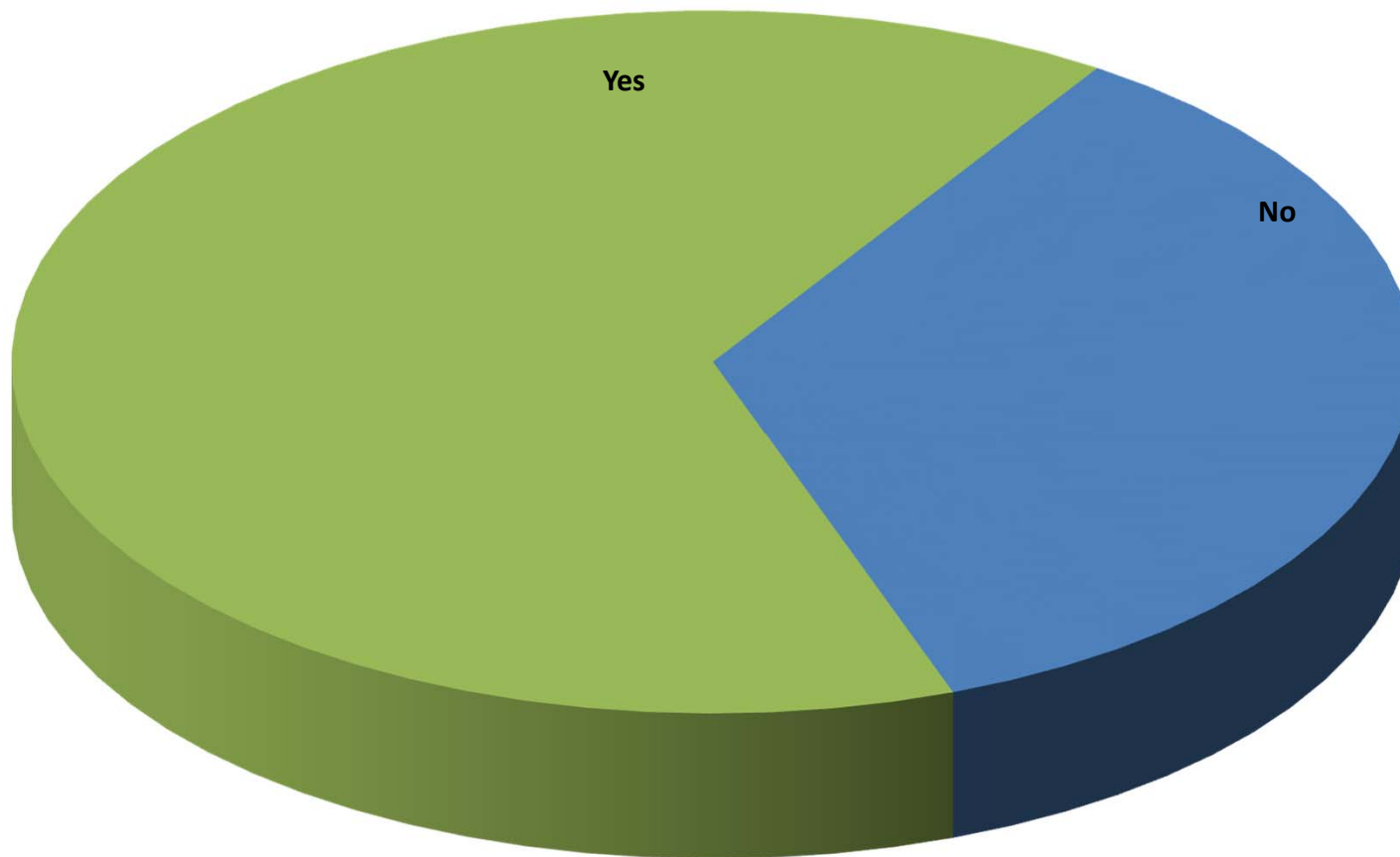
Q26: Are your technicians ASE certified?





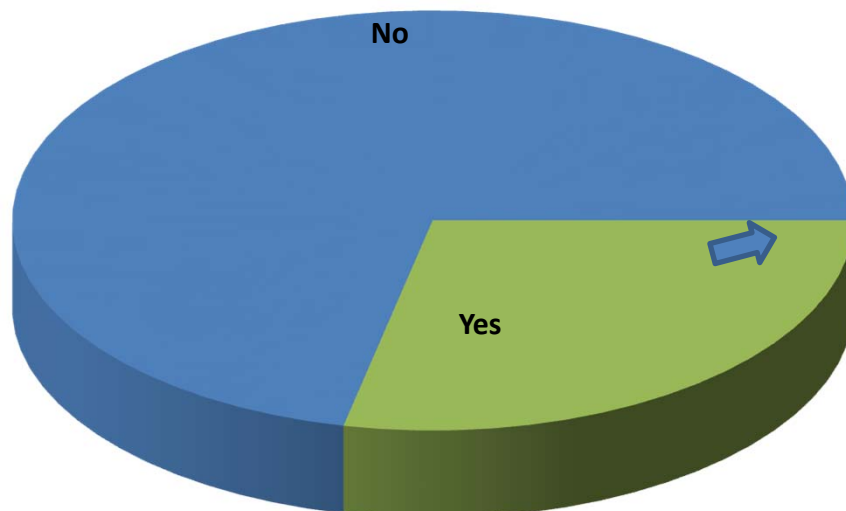
## Regular Training Education Programs

Q27: Does your shop staff participate in regular training & education programs for safety, environmental & health in the workplace?



## Support or Information for Collision Repair Equipment

**Q28: Is there any support or information collision repair equipment manufacturers should be providing to help your business that they are not now?**

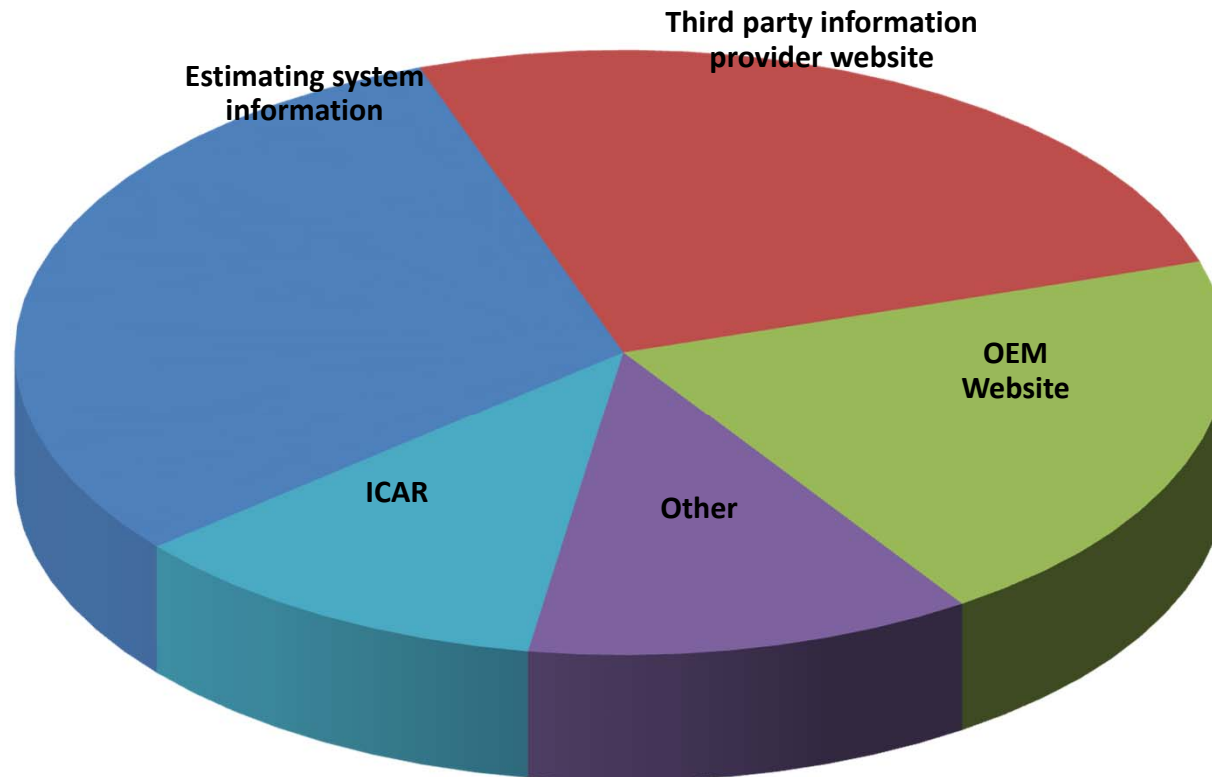


### Top Information Needed (Open-end)

- Tech information and repair recommendations, especially on newer vehicles
- Training sessions/materials
- Frame work and structural repair information
- No or low cost training
- Information on latest equipment
- Paint training and regulations
- Sectioning information
- Frame dimensions
- Manual
- Aluminum repairs information

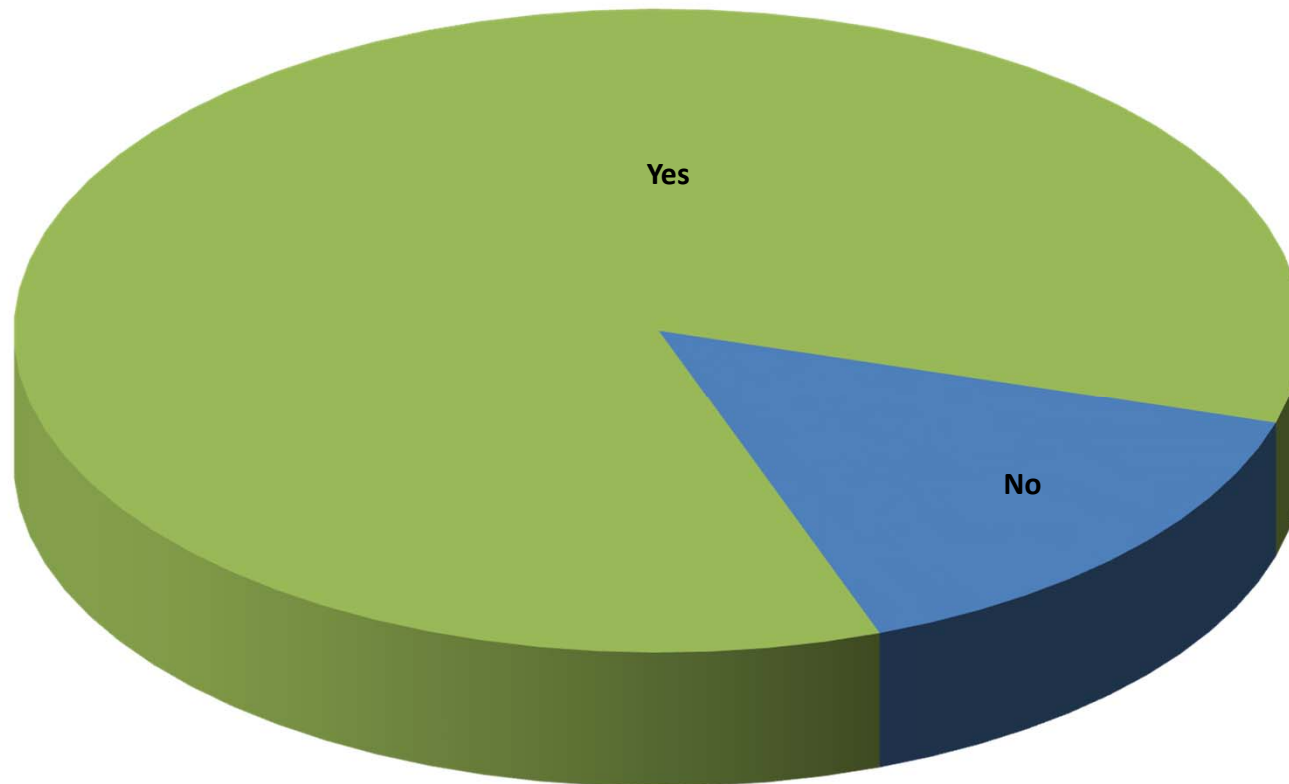
# Shop Repair Information Sources

Q29: Where do you primarily get your body shop repair information?



## Structural Repair Equipment Ownership

Q30: Do you currently own structural repair equipment (Bench or Rack) for repairing vehicles?



# Measuring System Ownership

Q31: Do you currently own a measuring system? Check all that apply.



*\*Note: Tram and Centerline Gauges are not an approved measuring device for repair*

Objectives/Methodology

Shop Demographics

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Training, Programs, and Information

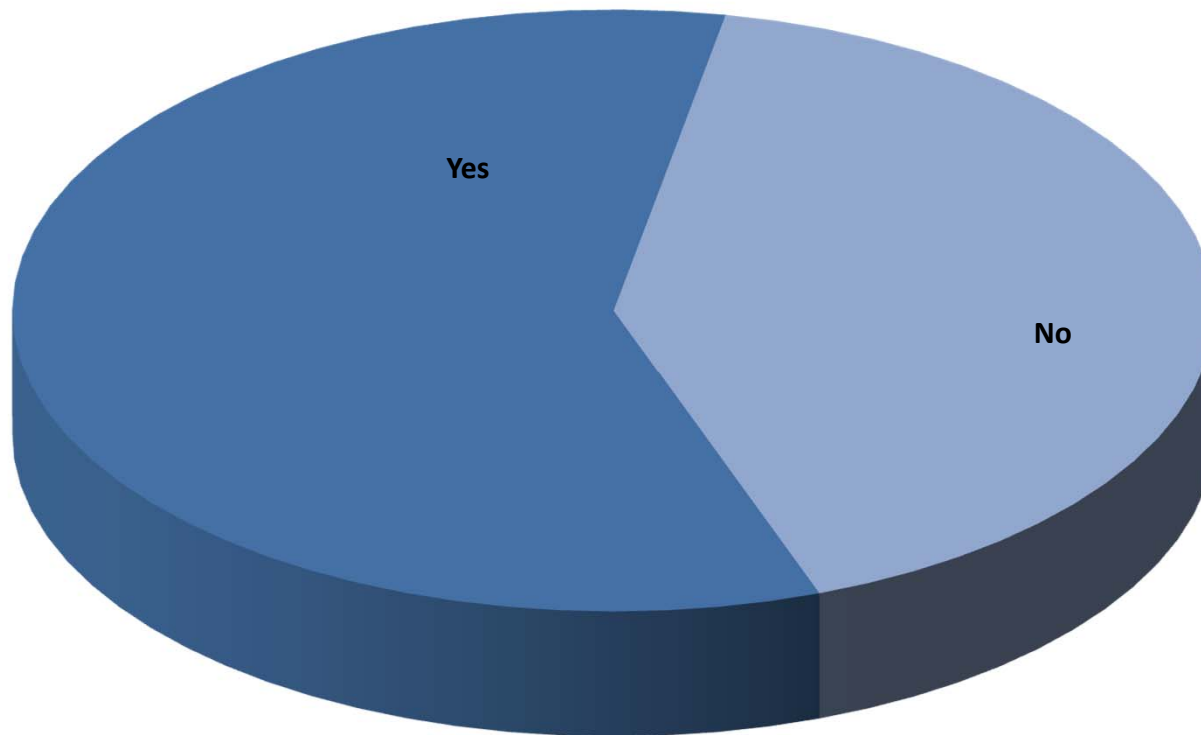
**Equipment Utilized and Purchased**

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Summary of Findings

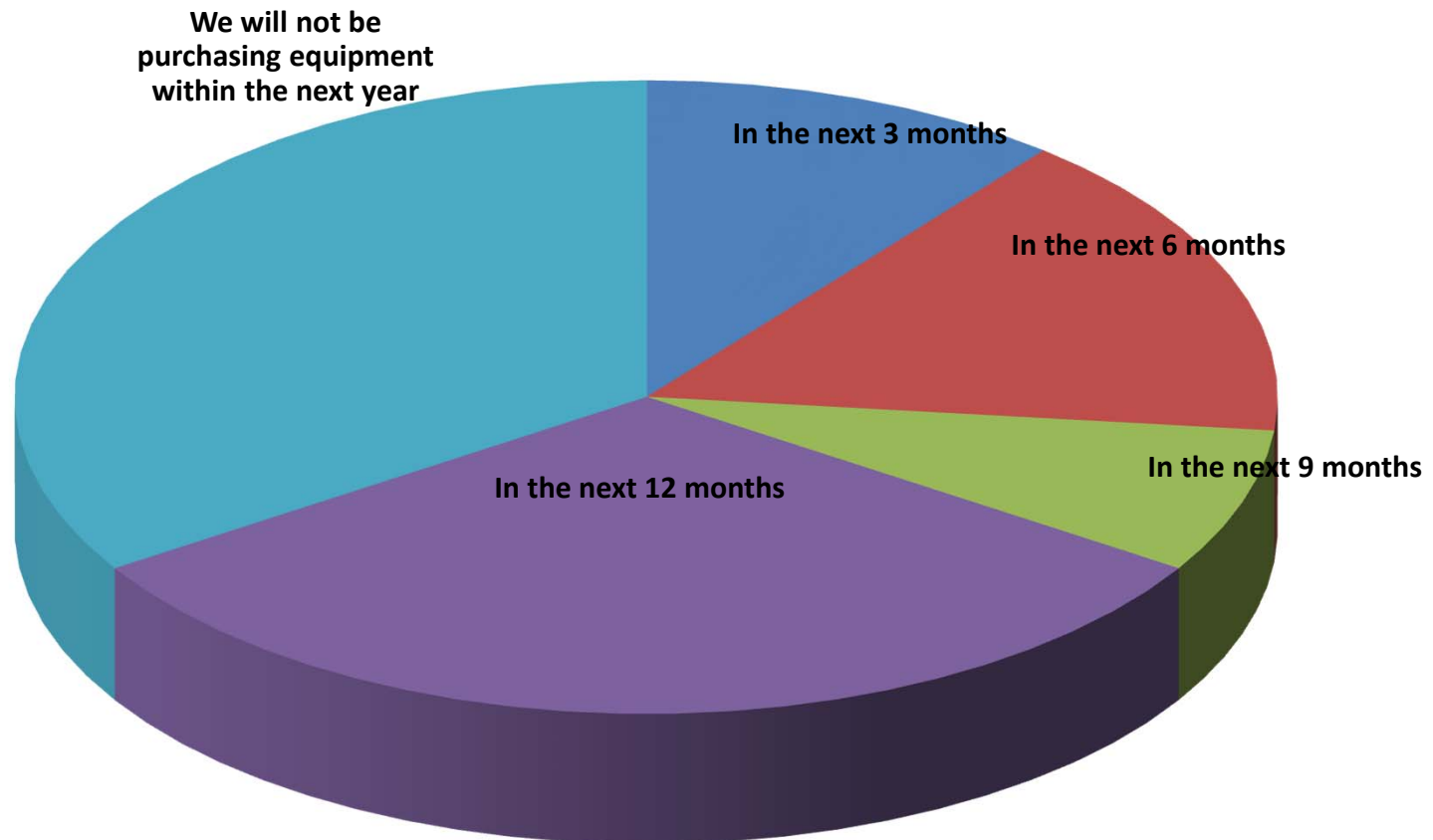
## Resistance Welding Equipment Ownership

Q32: Do you currently own resistance welding equipment?



## Purchase Plans on New Repair Equipment

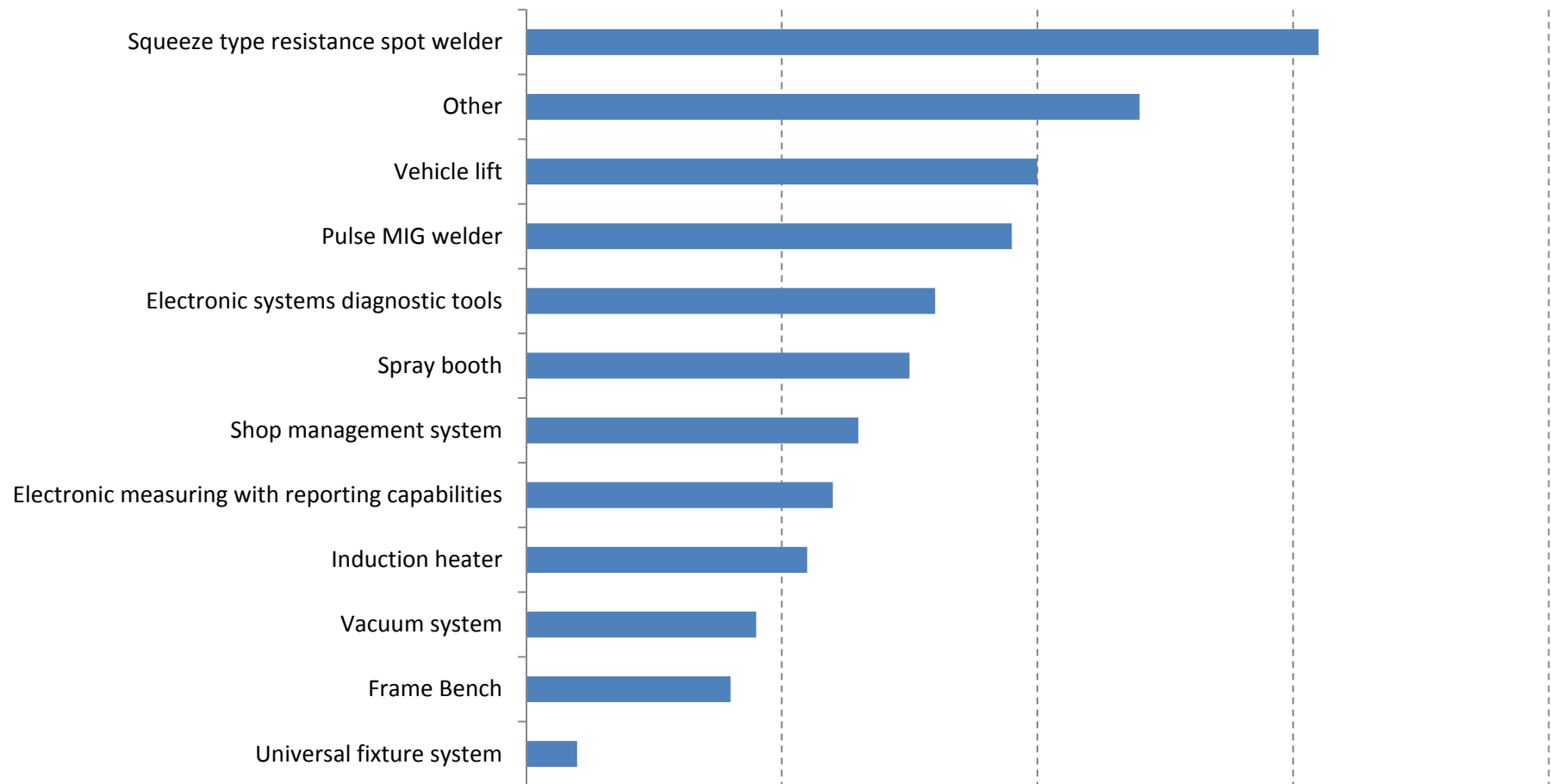
Q33: Do you plan to purchase new repair equipment?





# New Equipment Purchases

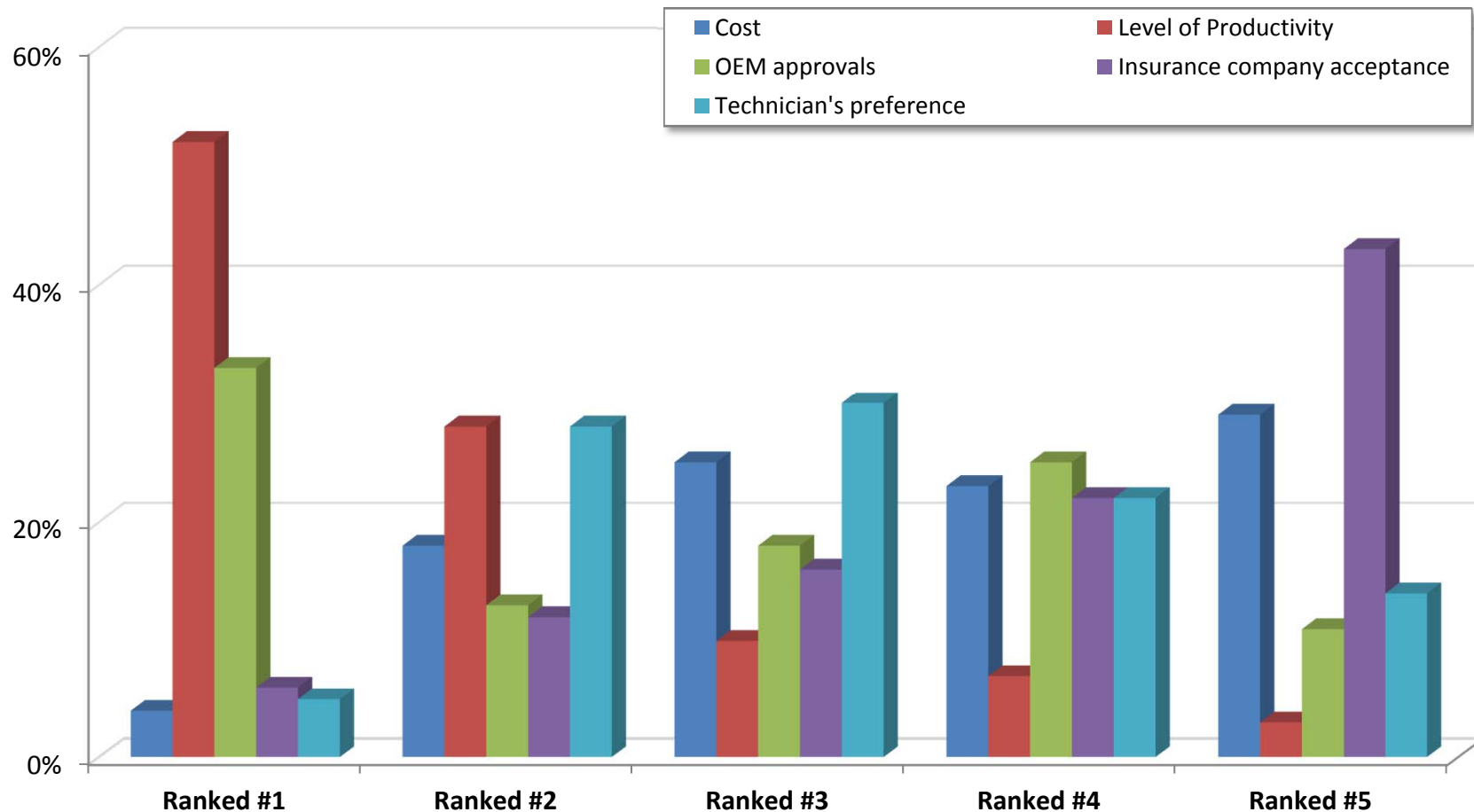
Q34: What new equipment do you plan on purchasing? Check all that apply.



Top Answer for "other" : Aluminum Repair Equipment

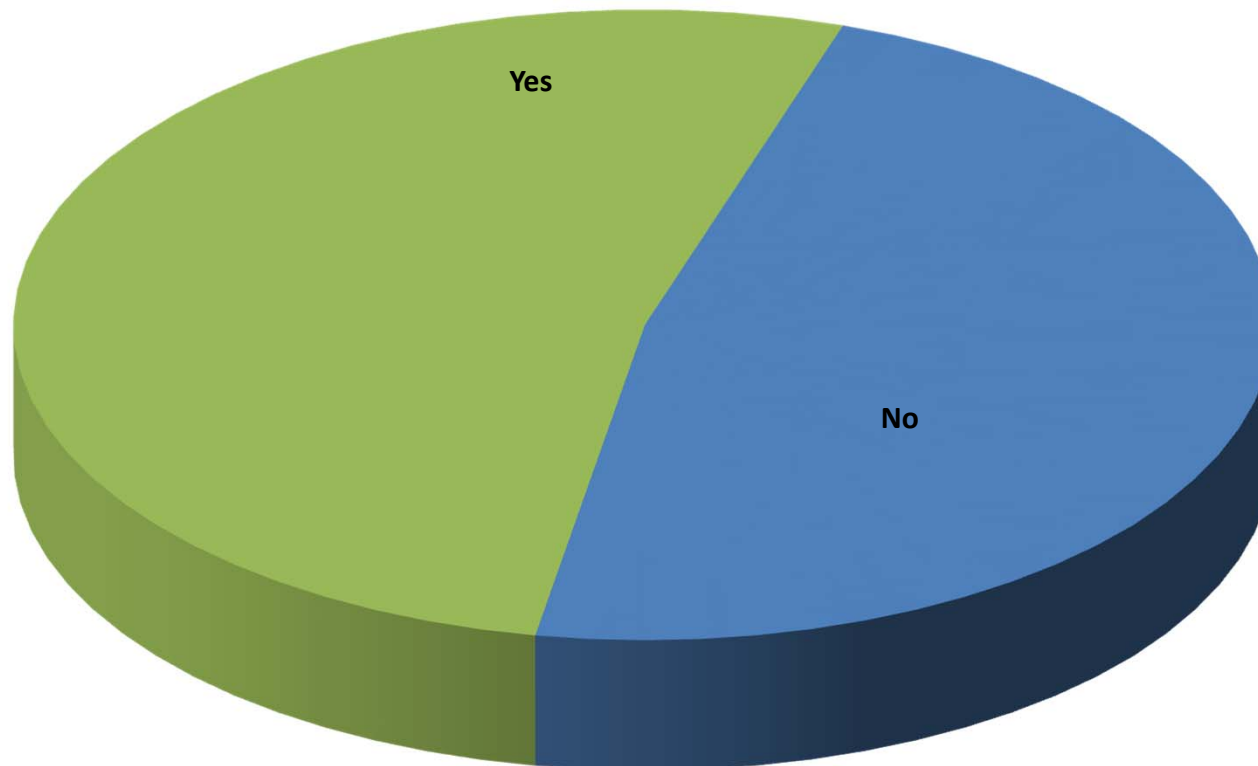
## Reasons for New Equipment Purchase

Q35a: From 1 to 5 (1 being the most important) which of the following best describes the reason you have decided to buy new equipment this year?



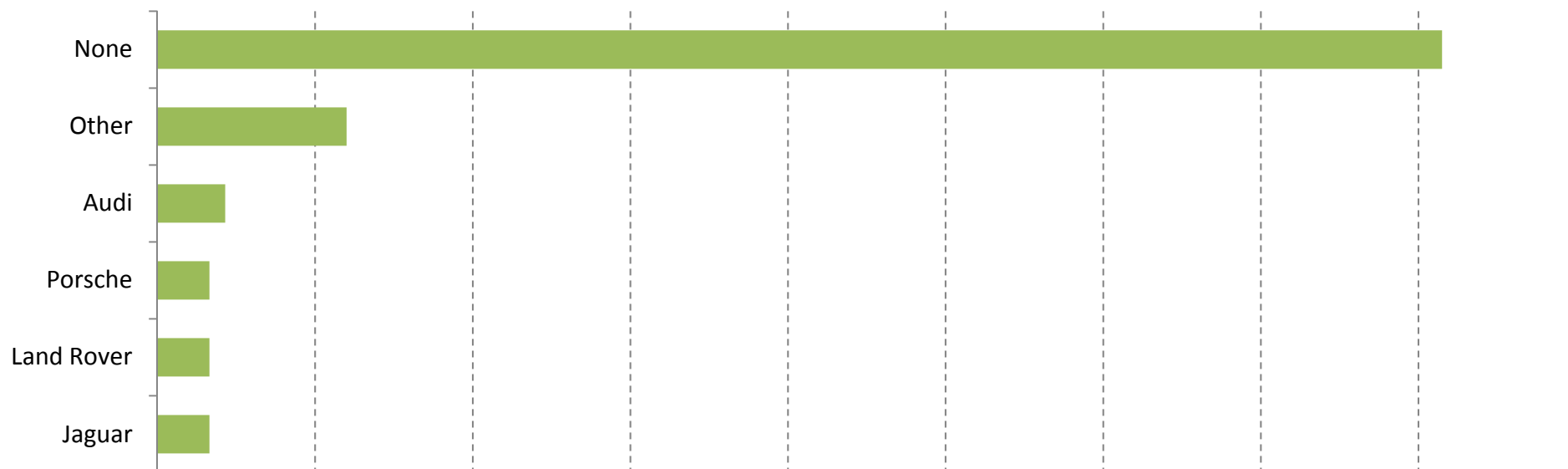
# Aluminum Vehicle Repair

Q36: Do you repair aluminum vehicles in your shop?



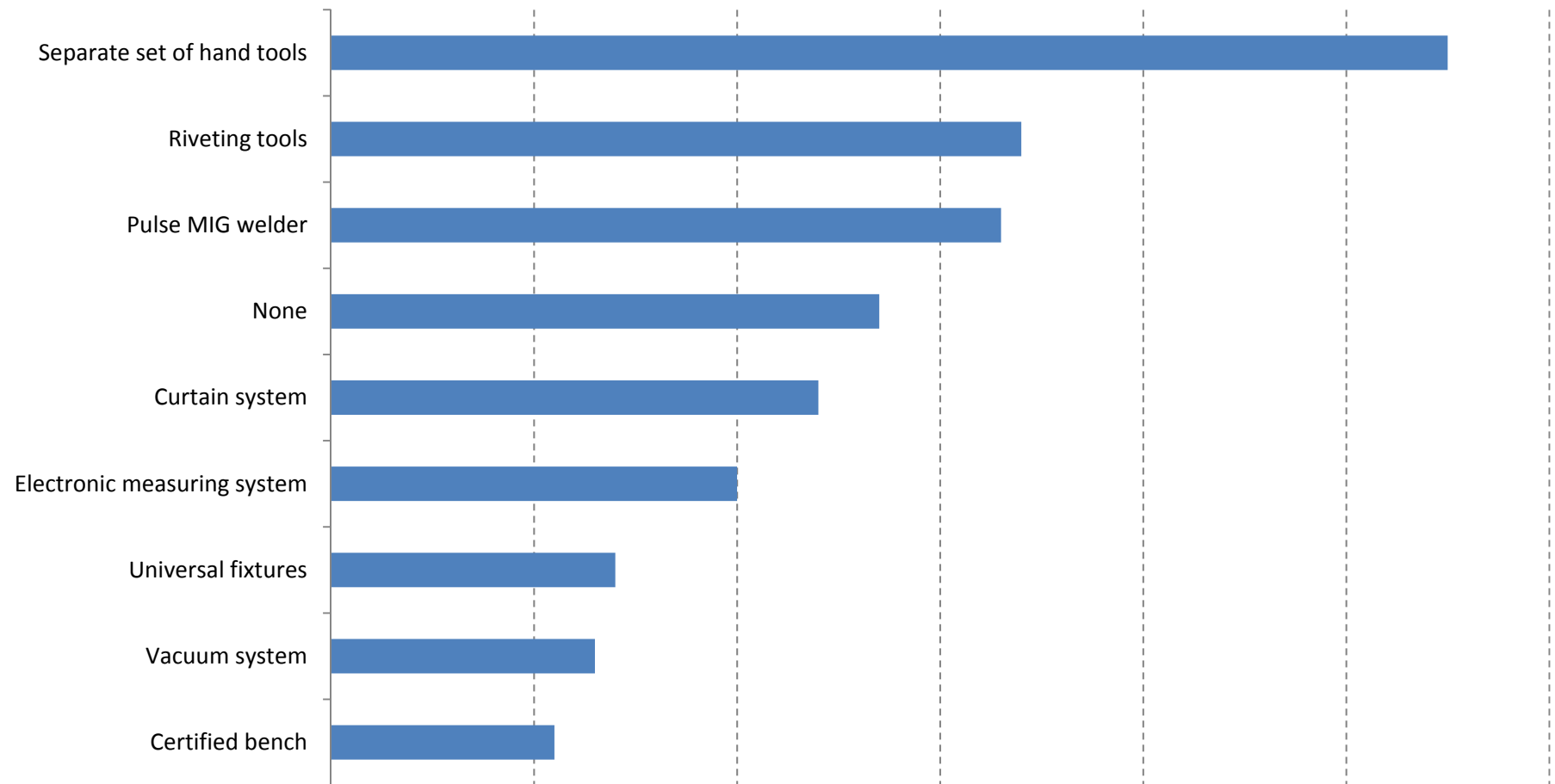
## OEM Certified Aluminum Repair Programs

Q37: Which OEM certified aluminum repair programs are you a part of, if any? Check all that apply.



## Tool Purchases for Aluminum Vehicles

Q38: What type of tools have you purchased to work on aluminum vehicles?  
Check all that apply.



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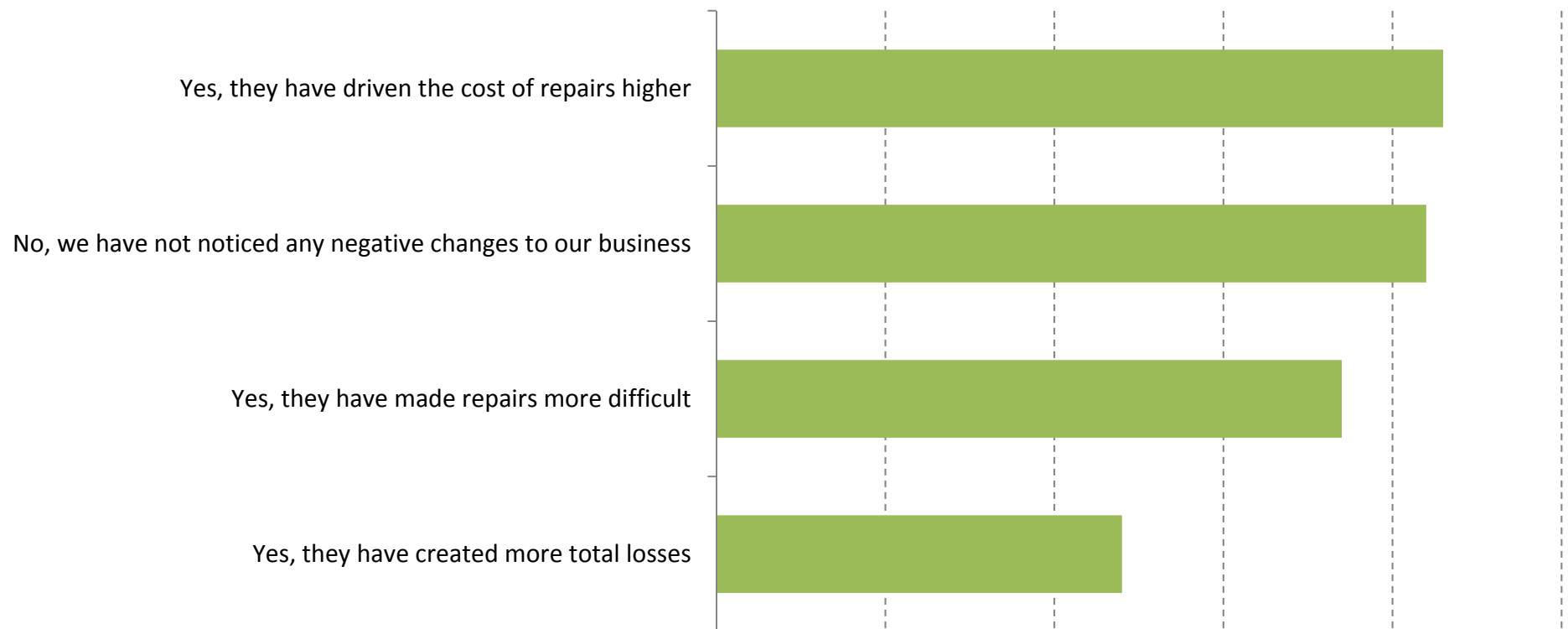
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Summary of Findings

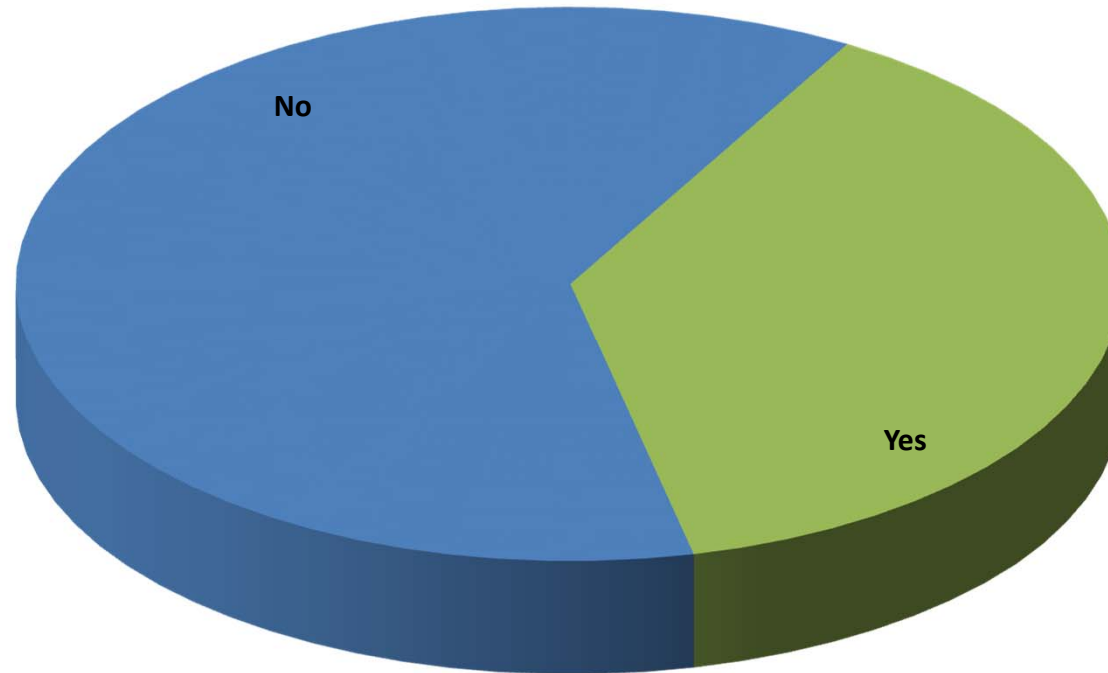
## Negative Affects - New Bonding Technique Requirements

Q39: Has the use of new technology such as ultra-high strength steel [Hot Stamp/Boron], aluminum, carbon fiber, or new bonding technique requirements negatively affected your business? Check all that apply.



## “Blueprinting” Process

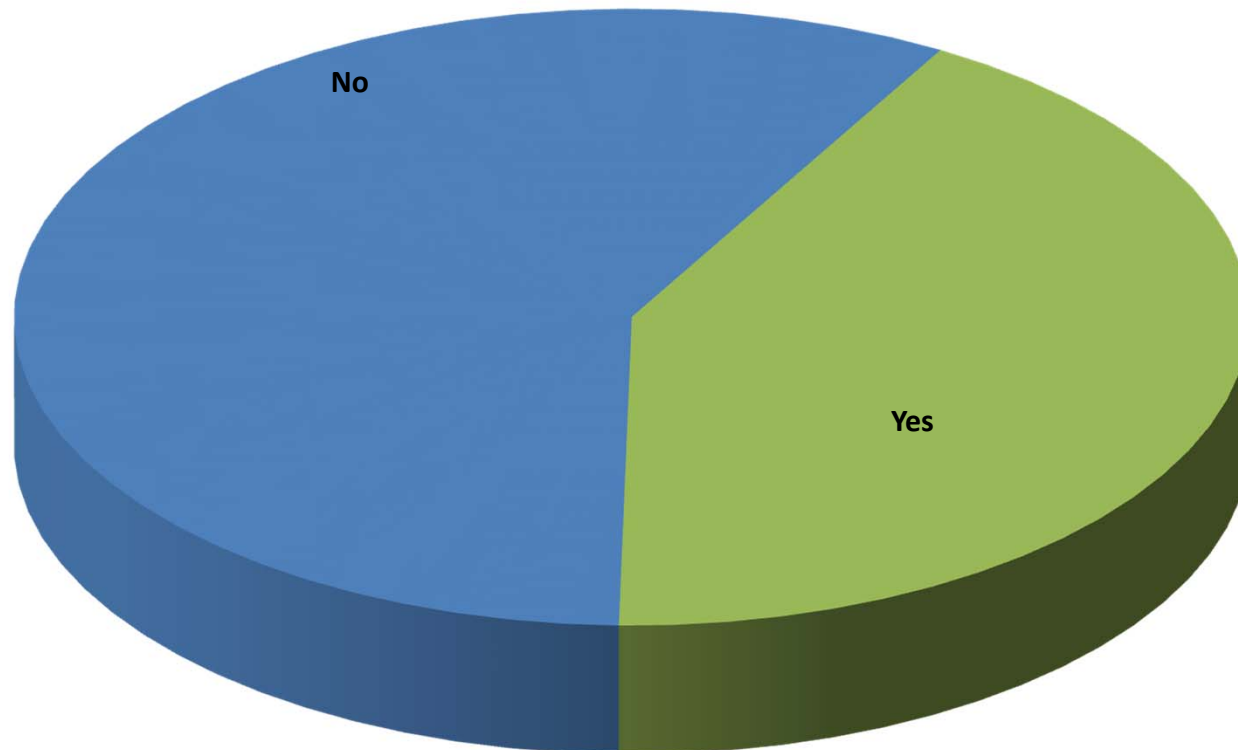
Q40: Does your shop use a “Blueprinting” process?





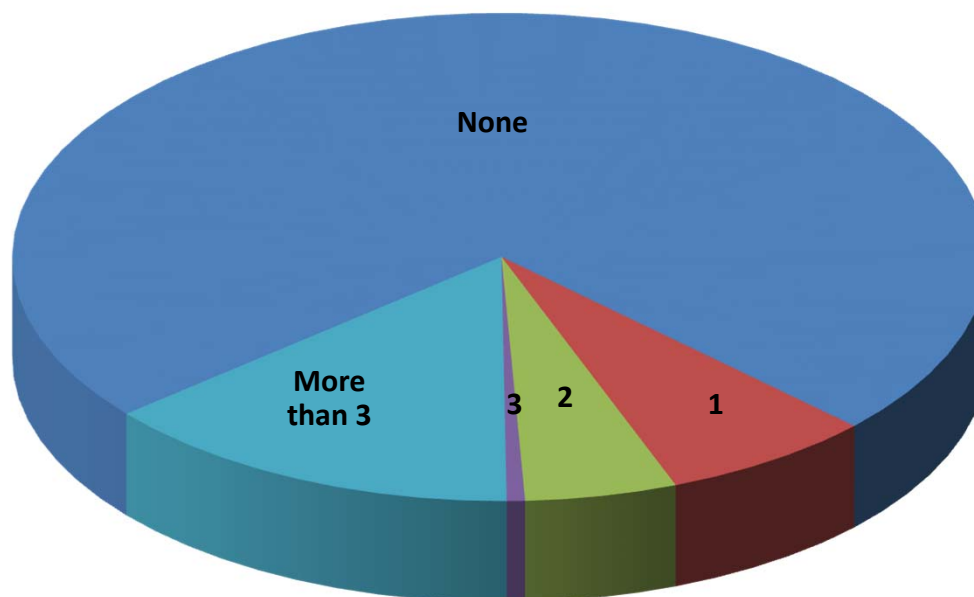
## Providing Dimensional Documentation Before and After

Q41: Do you provide insurance companies with before & after repair dimensional documentation?



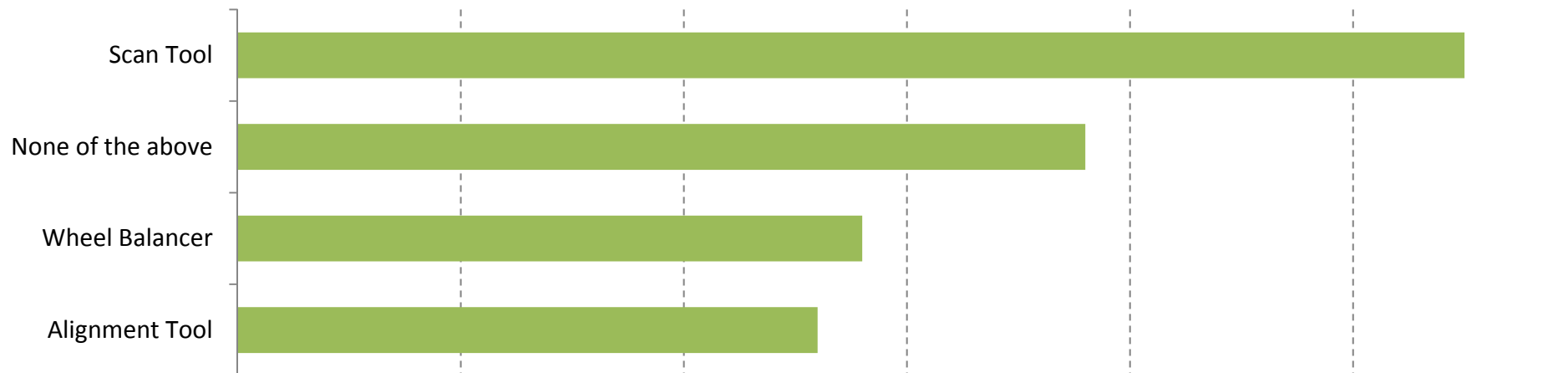
# Number of Insurance Companies Requiring Dimensional Information

Q42: How many insurance companies require you to provide repair dimensional information?



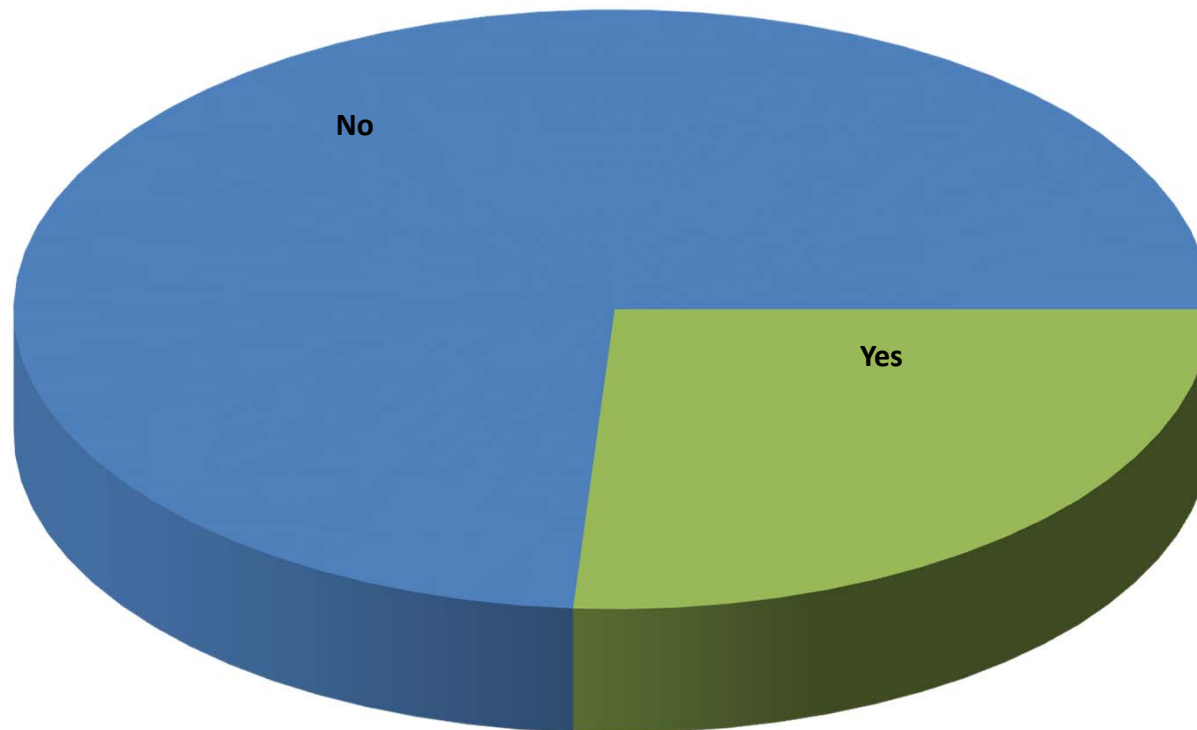
## Purchase of Diagnostic/Wheel Service Equipment

Q43: Have you purchased any diagnostic or wheel service equipment to facilitate your collision repairs?



## Equipped to Handle Safety Systems

Q44: Is your shop equipped to handle the repair & diagnosis of passive safety systems such as active cruise control sensor alignment or lane detection system calibration?



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**Summary of Findings**

# Summary of Findings

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## Demographics/Current Environment

Most respondents from this study were either business owners or shop managers . The majority of respondents were from independent repair shops.

Besides bodywork, most respondents perform mechanical repairs, with a majority repairing between 1-40 vehicles per month; a minority work on more than 100 vehicles per month.

Over half of respondents report that a majority of their repairs are insurance provided.

## Types of Vehicles Repaired

Majority of the shops work primarily on domestic vehicles, second primarily on Asian vehicles, and only lastly report working primarily on European vehicles.

## Training, Programs, and Information

The vast majority of respondents are not active members of an industry group, and the majority do not participate in OEM Certification Collision Repair Programs.

Majority of respondents will continue with the same training level from previous years, and some of respondents will increase training from previous years.

## Summary of Findings (Cont'd)

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### Information Sources

Approximately one third of respondents think there should be more manufacturer support or information regarding collision repair equipment.

### Equipment Utilized and Purchased

Majority of the respondents own structural repair equipment , almost half own qualified measuring systems, and own resistance welding equipment.

### Equipment Utilized and Purchased

Over half of respondents plan to purchase new repair equipment in the next 3 to 12 months.

New equipment purchases most frequently mentioned include: Squeeze type resistance spot welder, *Aluminum repair equipment*, Vehicle lift, Pulse MIG Welder

Reported purchases of diagnostic/wheel service equipment for collision repair include: Scan tools, Wheel balancer, Alignment tools

### Late Model Repairs

Over half of respondents repair aluminum vehicles in their shop, but less than one quarter are OEM Certified in Aluminum Repair Programs.

Thank You

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**COMPLETE SURVEY RESULTS  
WILL BE PROVIDED TO ALL ETI FULL MEMBERS  
AND AVAILABLE FOR PURCHASE FROM ETI**