

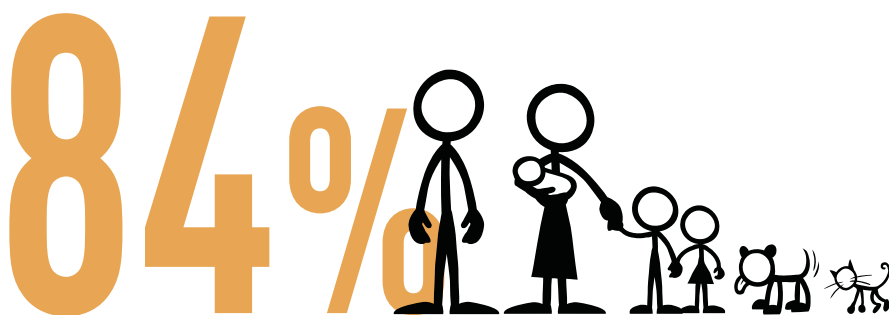
A special section to

BODY SHOP BUSINESS

IN FOCUS PERSON

BabcoX

Shop Owner



of shop owners run a family-owned collision repair shop

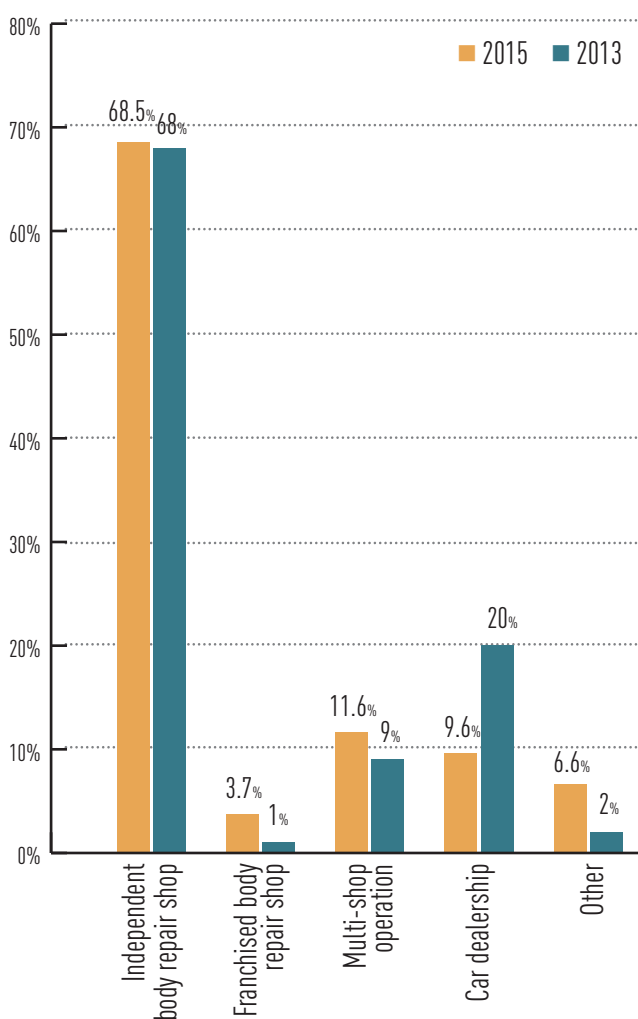
30.2 Average years shop has been open

53 Percentage of shop owners between the ages of 50 and 64

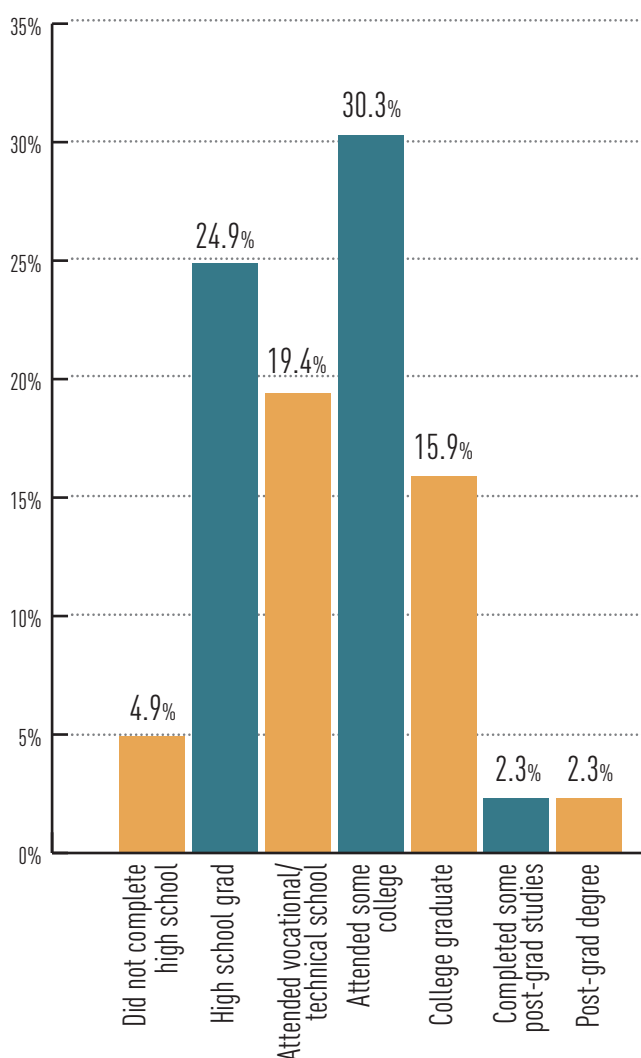
95 Percentage of shop owners who are male

24 Percentage who own more than one shop

Which of the following best describes your business?

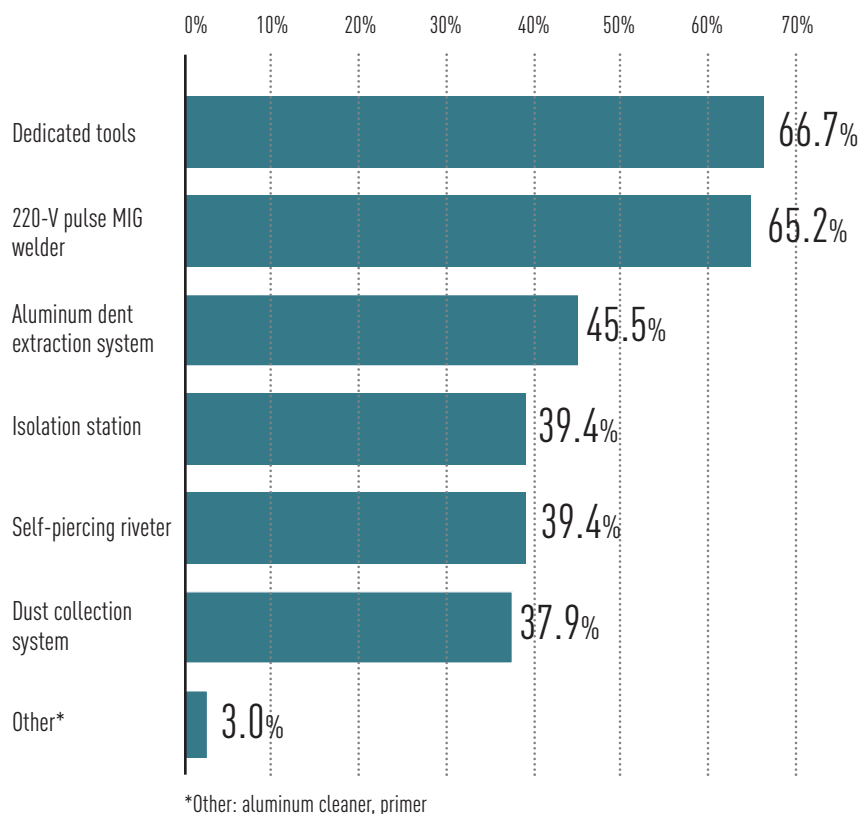


Highest education level attained.

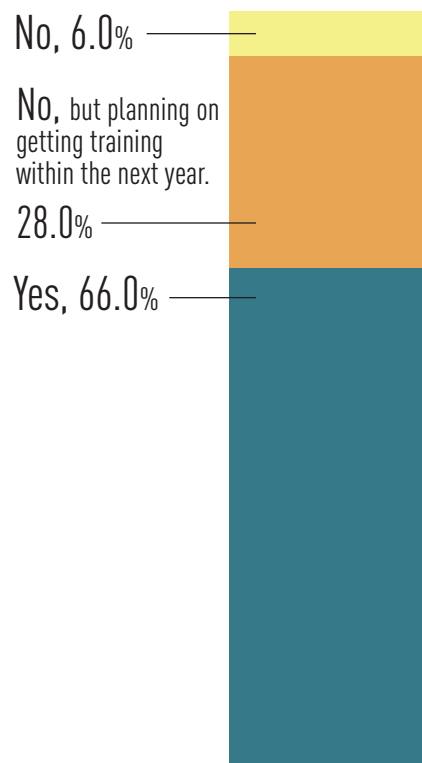


Aluminum Repair

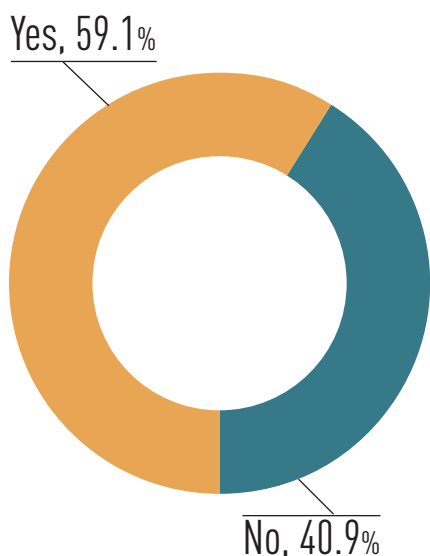
What equipment do you have for aluminum repairs?



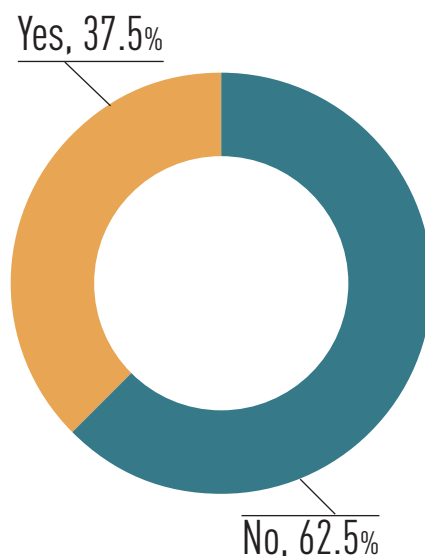
Have you or anyone who works in your shop(s) had any aluminum training within the past year?



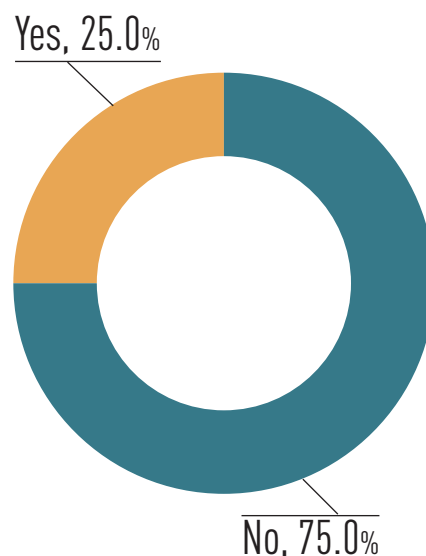
Do you feel prepared to perform aluminum repairs?



Are you or anyone in your shop/company certified by an OE to perform aluminum repairs?

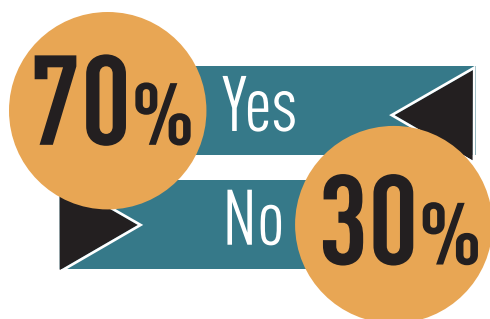


Are you certified to repair the 2015 Ford F-150?

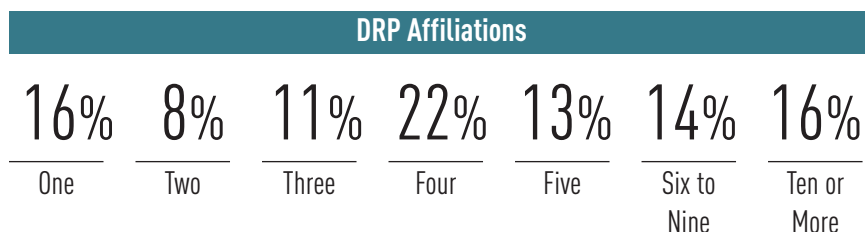


Operations

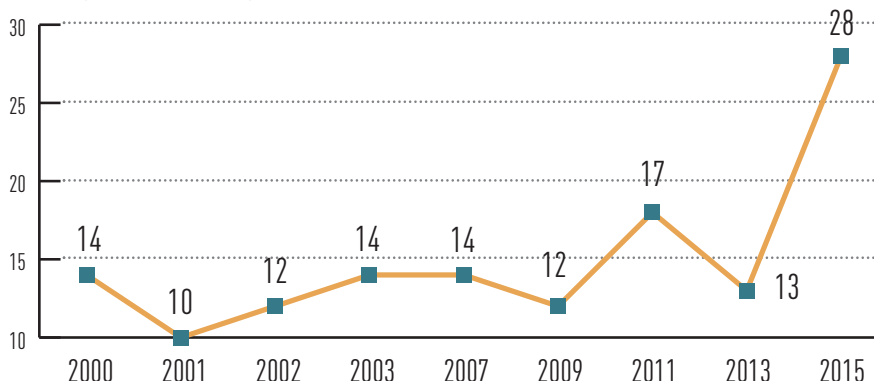
Are you on any DRPs?



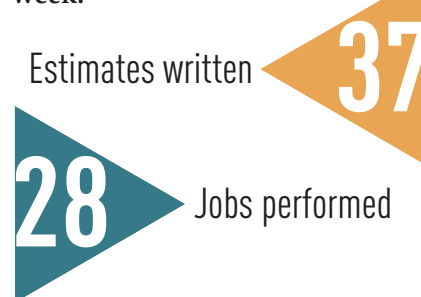
How many DRPs do you have?



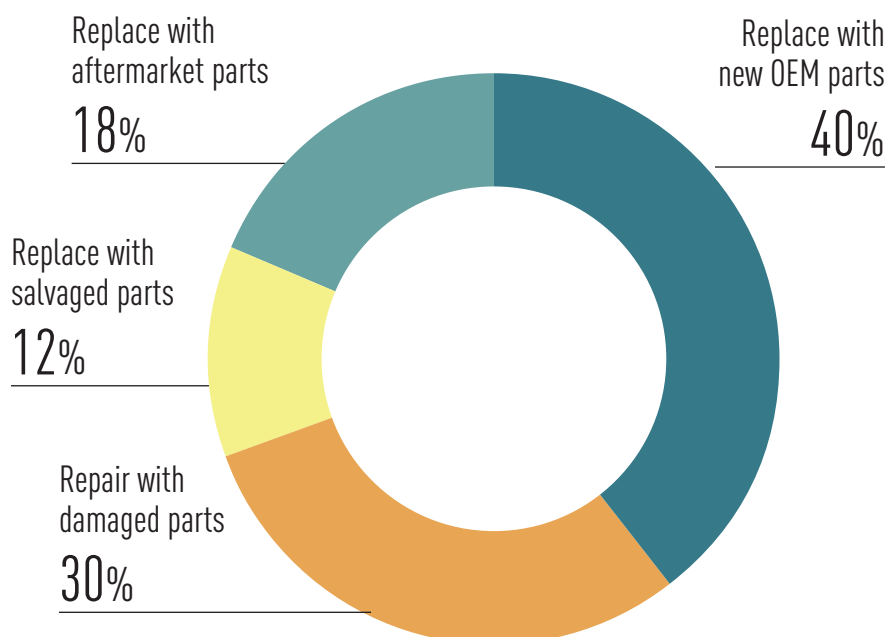
Average number of jobs performed each week: 28



Average number of estimates written and jobs performed per week.



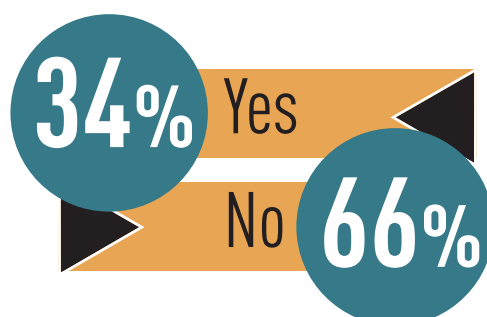
When making collision repairs, what percentage of time do you:



85%

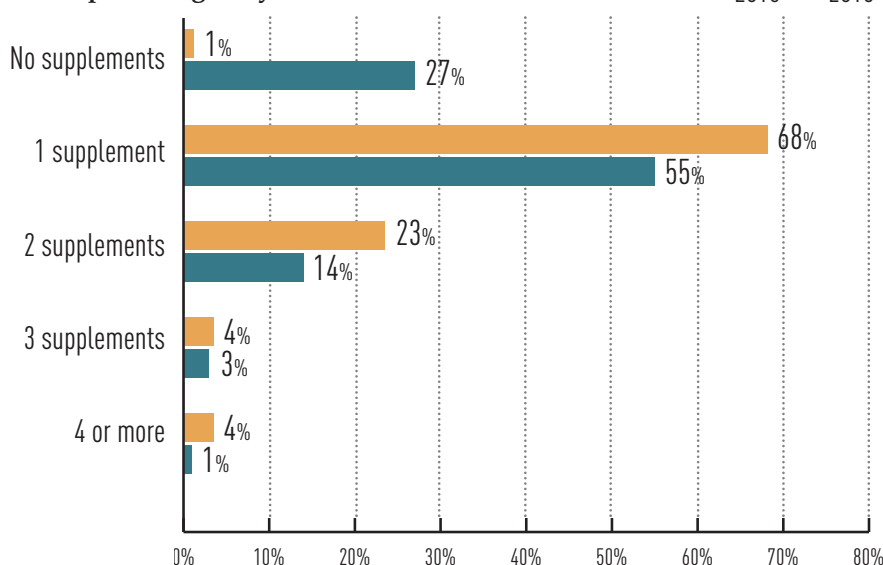
Percentage of estimates converted to actual jobs.

Have you ever offered to save a customer's deductible?

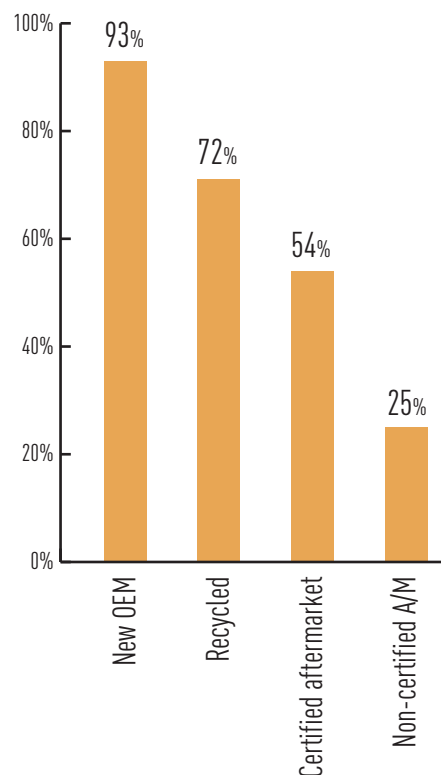


What percentage of your estimates include:

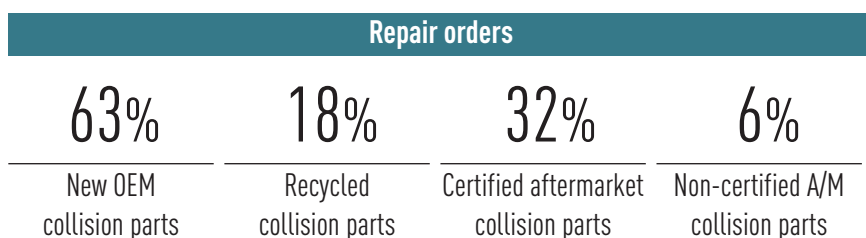
2015 2013



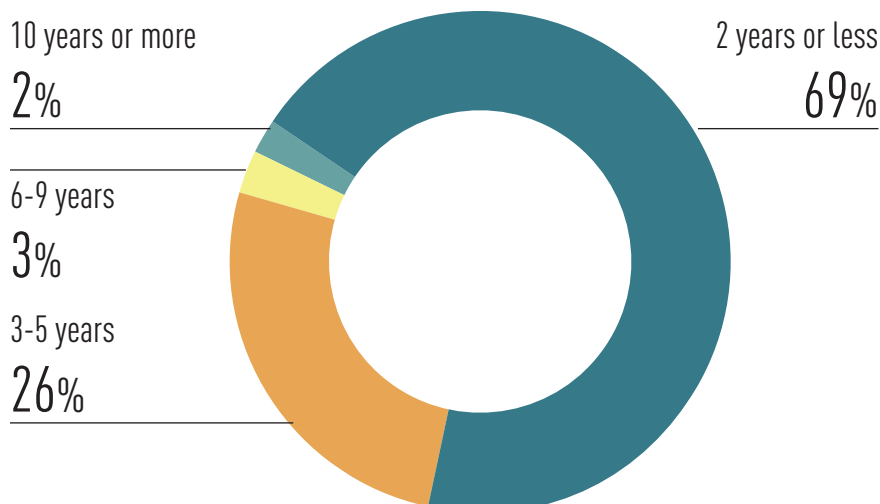
Percentage of replacement crash parts that provide an acceptable fit.



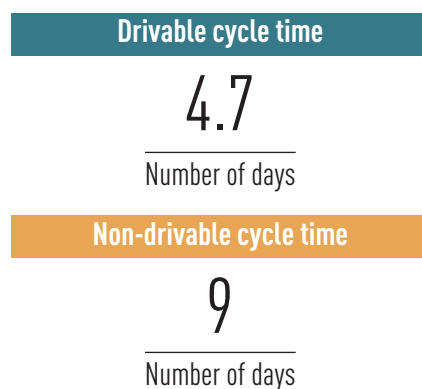
What percentage of your repair orders include:



Age of vehicles for which A/M crash parts are being specified for insurance appraisals.



What is your average cycle time?



Average ticket

\$2,300

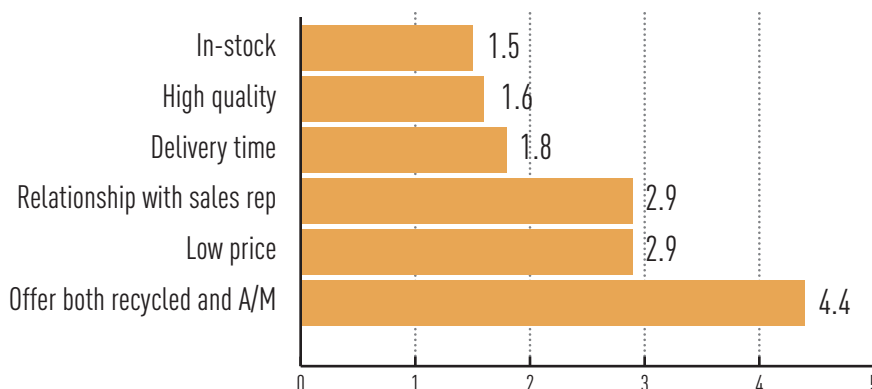
Average ticket for non-DRP shop

\$1,925

Average ticket for DRP shop

\$2,445

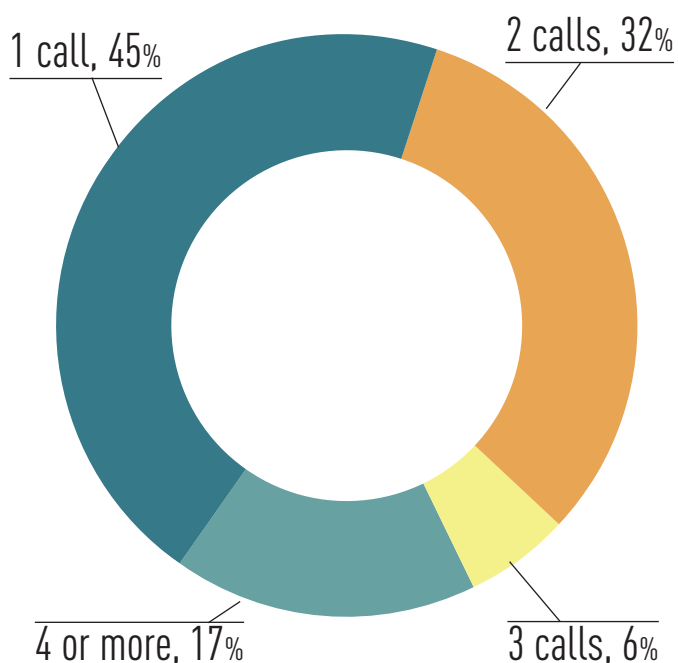
What matters most when selecting a parts vendor? (1=most important, 5=least important)



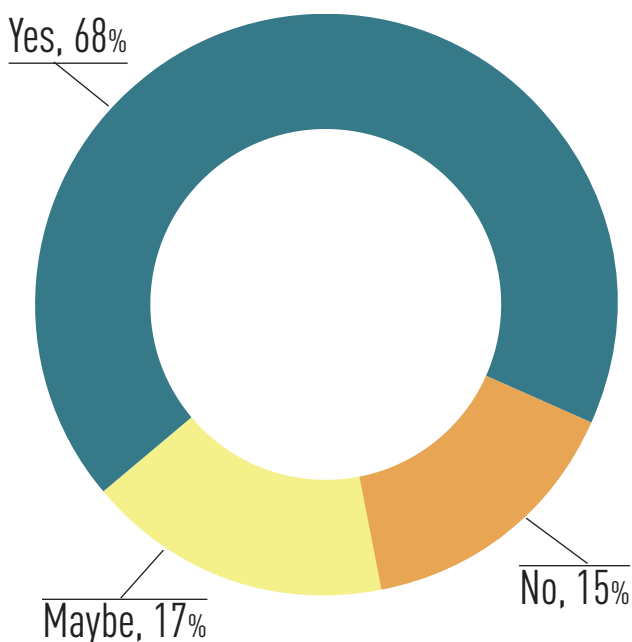
Has an insurer ever asked you to use recycled/used suspension parts on a repair?



On average, how many calls do you need to make to obtain the parts you need?

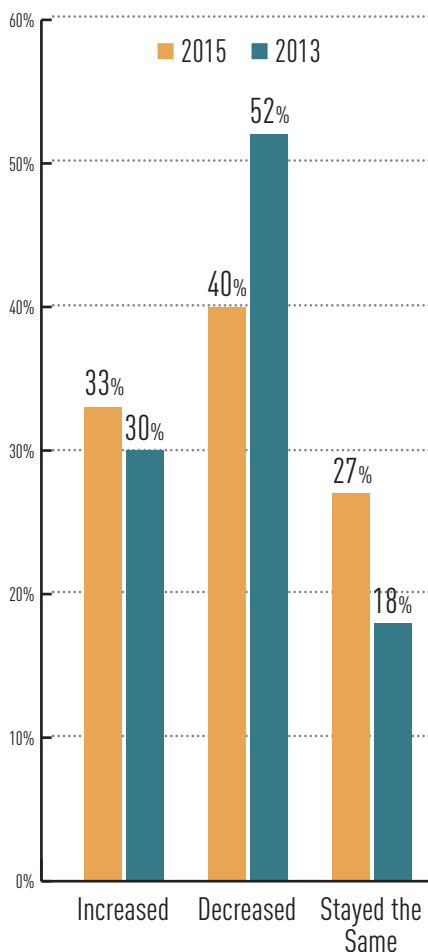


If possible, would you use fewer parts suppliers?



Insurer-Repairer Relations

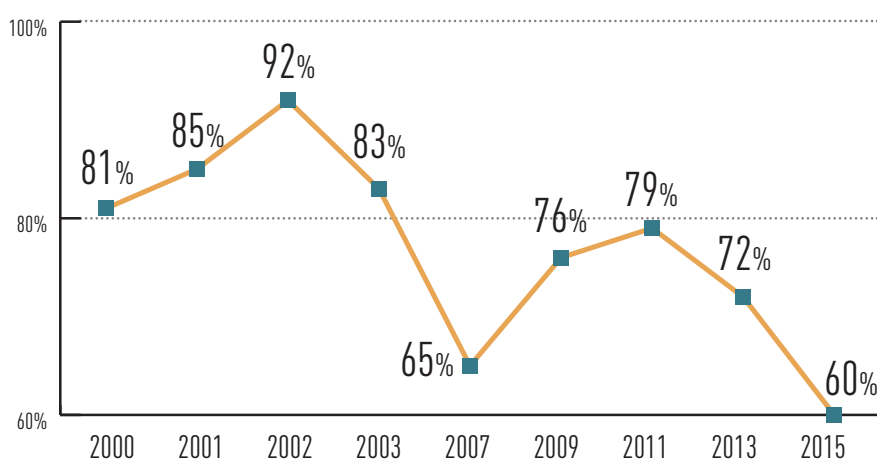
Since DRP affiliation, how have your profit margins done?



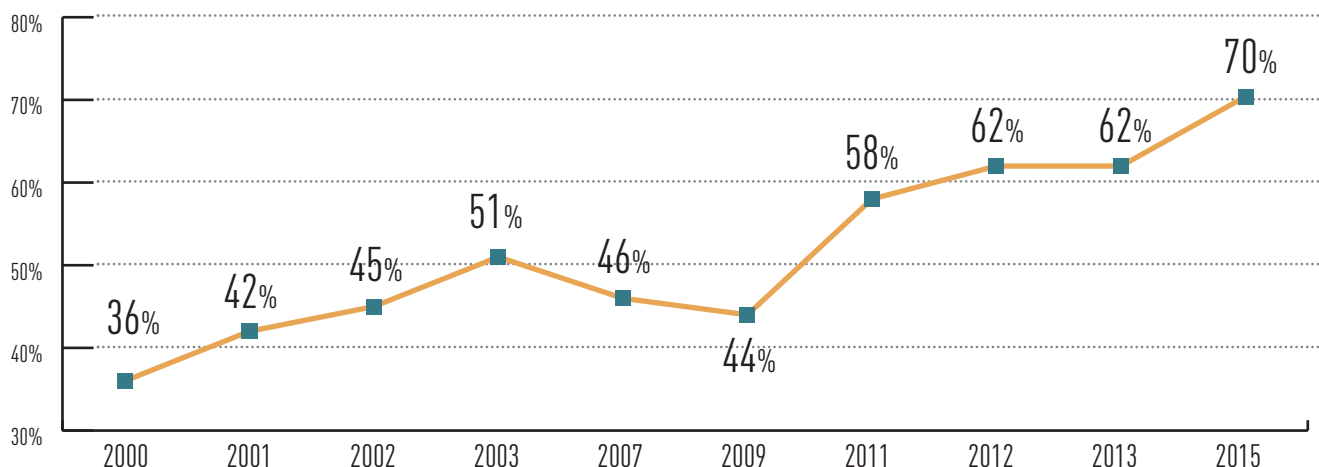
Do you think the concept of DRPs is good or bad for the industry?

DRP Shops				
6%	39%	15%	11%	29%
Excellent	Good	Not Sure	Fair	Poor
Non-DRP Shops				
0%	7%	3%	17%	73%
Excellent	Good	Not Sure	Fair	Poor

Percentage saying shop is better off due to the DRP arrangement.

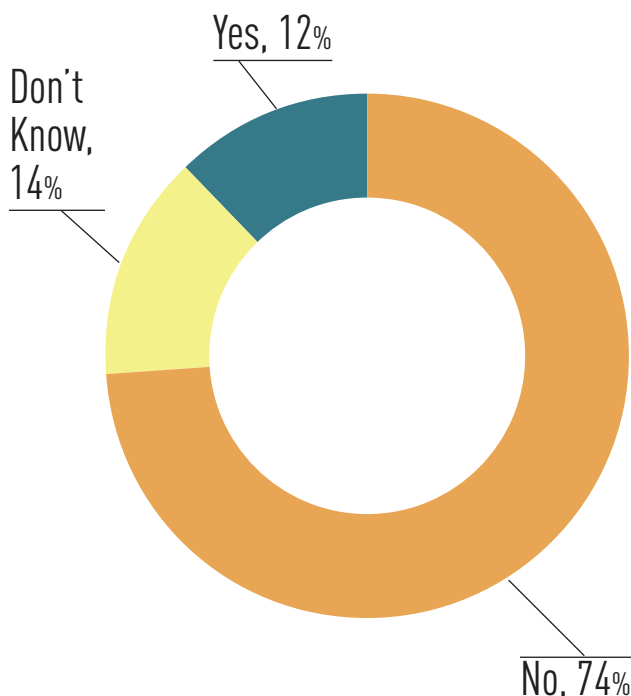


Percentage involved in DRPs, 2000-2015.

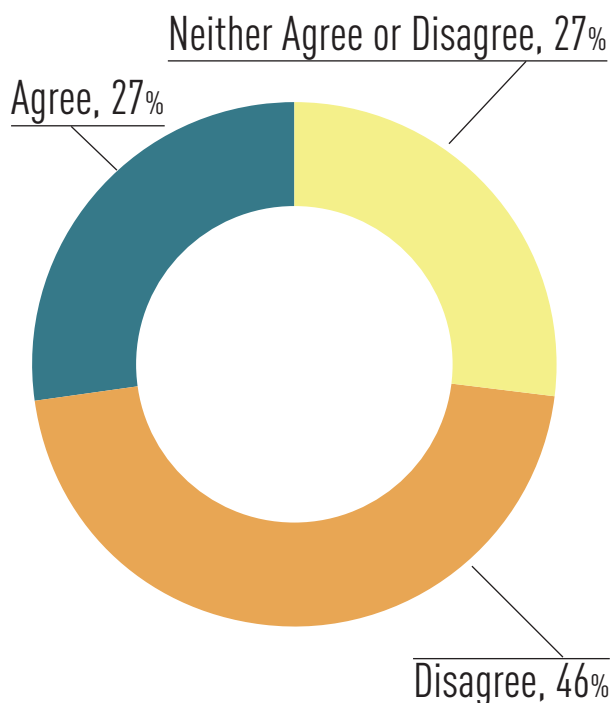


Insurer-Repairer Relations

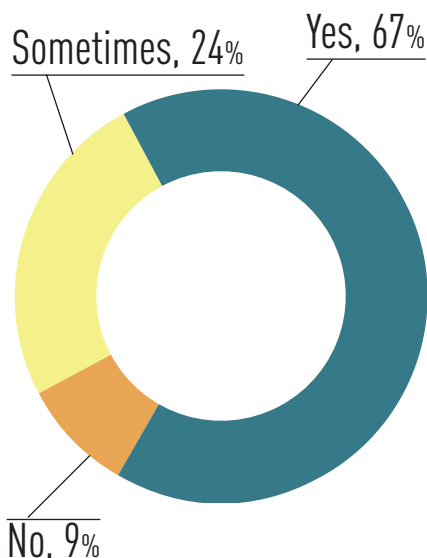
Do you believe insurers' surveys of labor rates in a market are accurate?



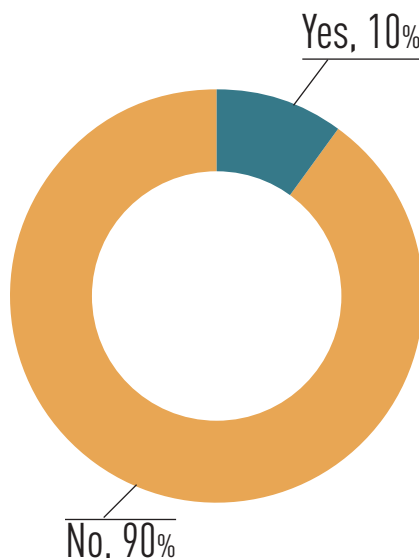
Do you feel DRPs hamper your ability to properly repair the vehicle?



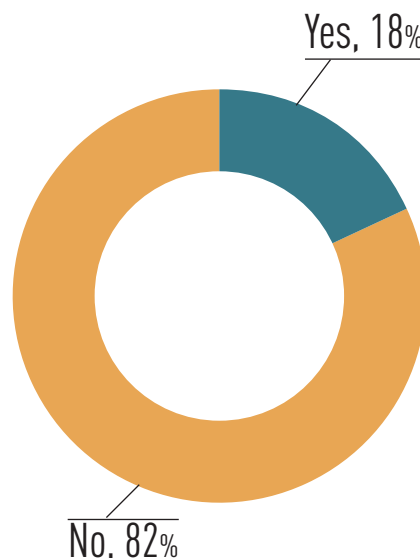
Do you experience influence from insurance companies to suppress your rates?



Do you feel it is the insurer's responsibility to determine what types of parts are used in a repair?



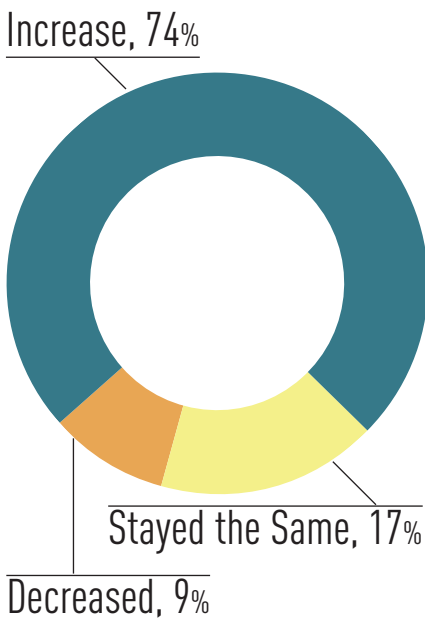
Do most insurers in your area pay for OEM parts if a customer objects to aftermarket parts?



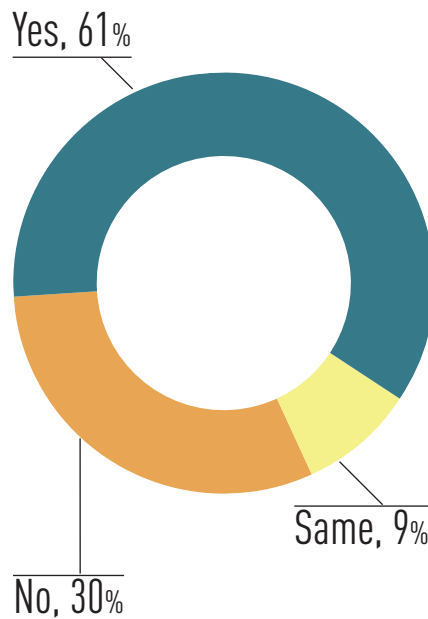
Market Profile



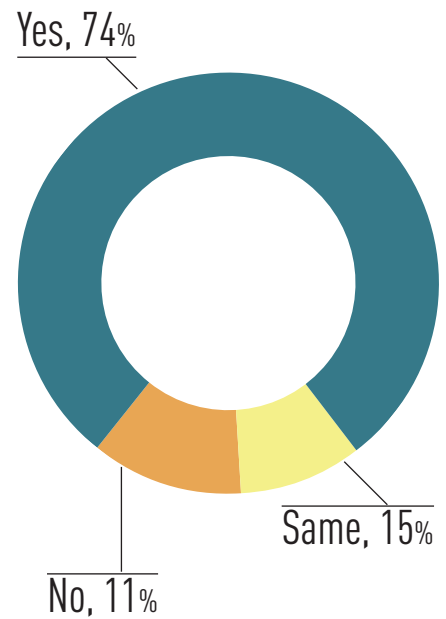
Compared to 2013, did your 2014 sales:



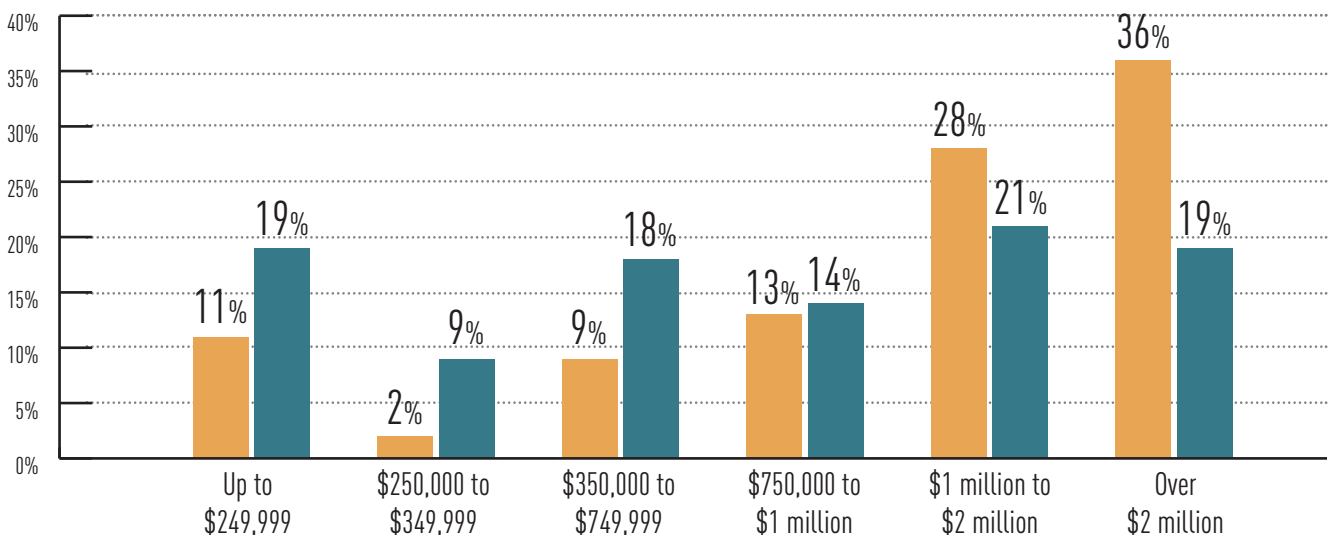
Do you think your business is financially better off today than it was five years ago?



In the next five years, do you think your business will be more successful than it is today?



What was your shop's gross sales in 2014? 2014 2012





Market Profile

How much money would you estimate you spend annually on all forms of advertising/promotion?

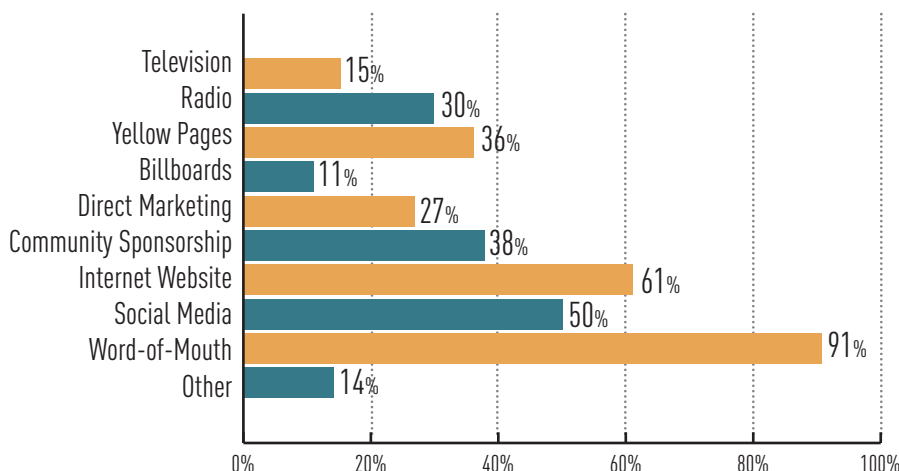
Average

\$24,847

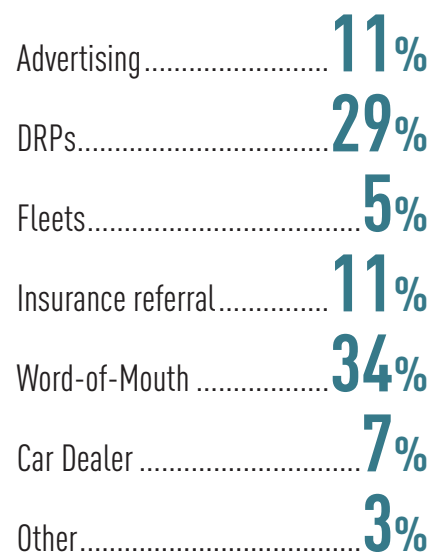
Median

\$5,000

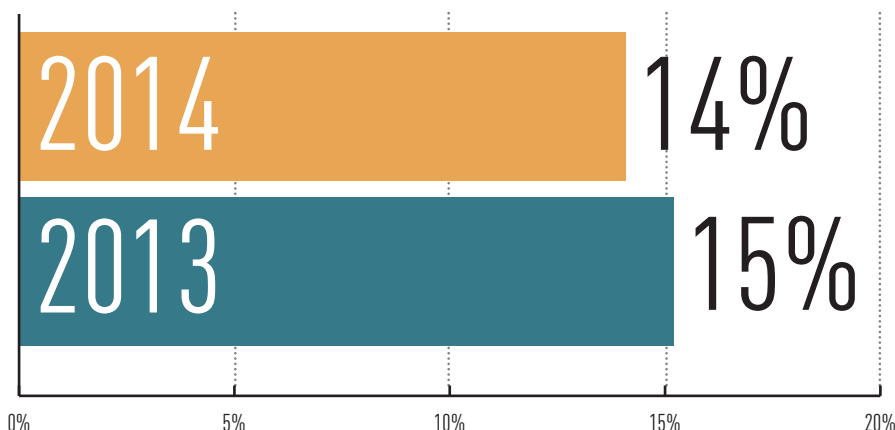
How do you market your services?



What percentage of your business is generated from each source?



What was your 2014 net profit percentage?



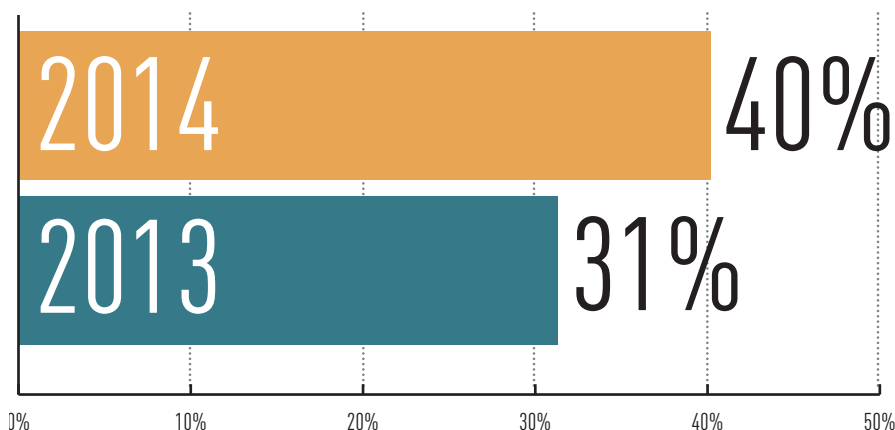
What percentage of your sales is attributed to parts and labor?

Parts, 46%



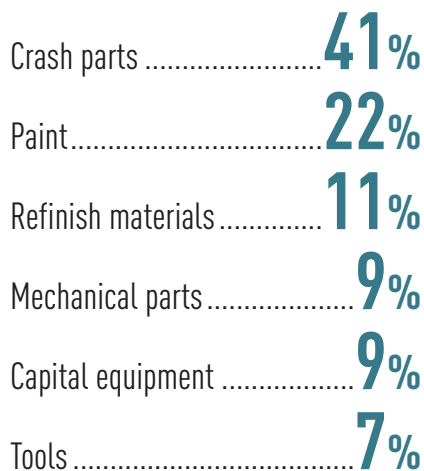
Labor, 54%

What was your 2014 gross profit?

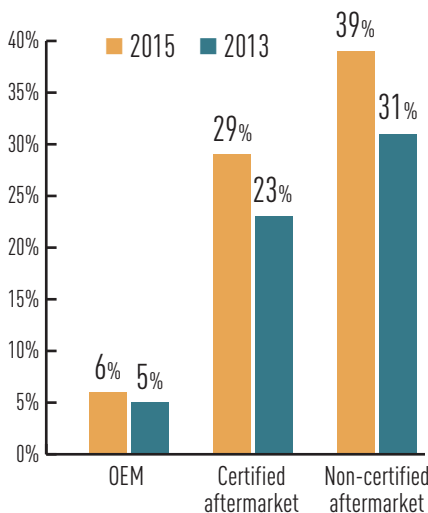


Purchasing

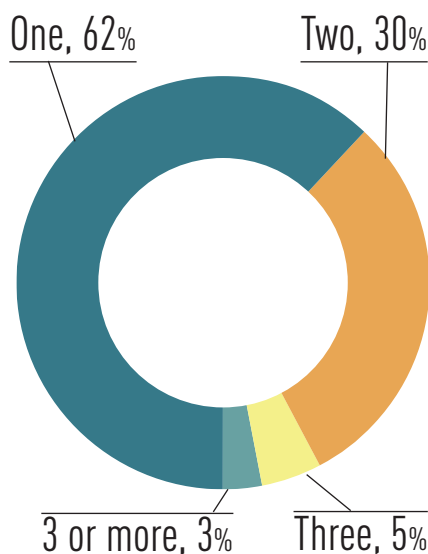
Percentage of buying dollars spent on:



Percentage of replacement crash parts returned to vendor.



How many estimating software/estimating systems do you currently use?



How much do you pay in monthly estimating subscription fees?

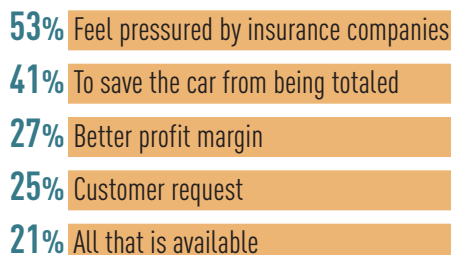
2015 Average

\$1,146

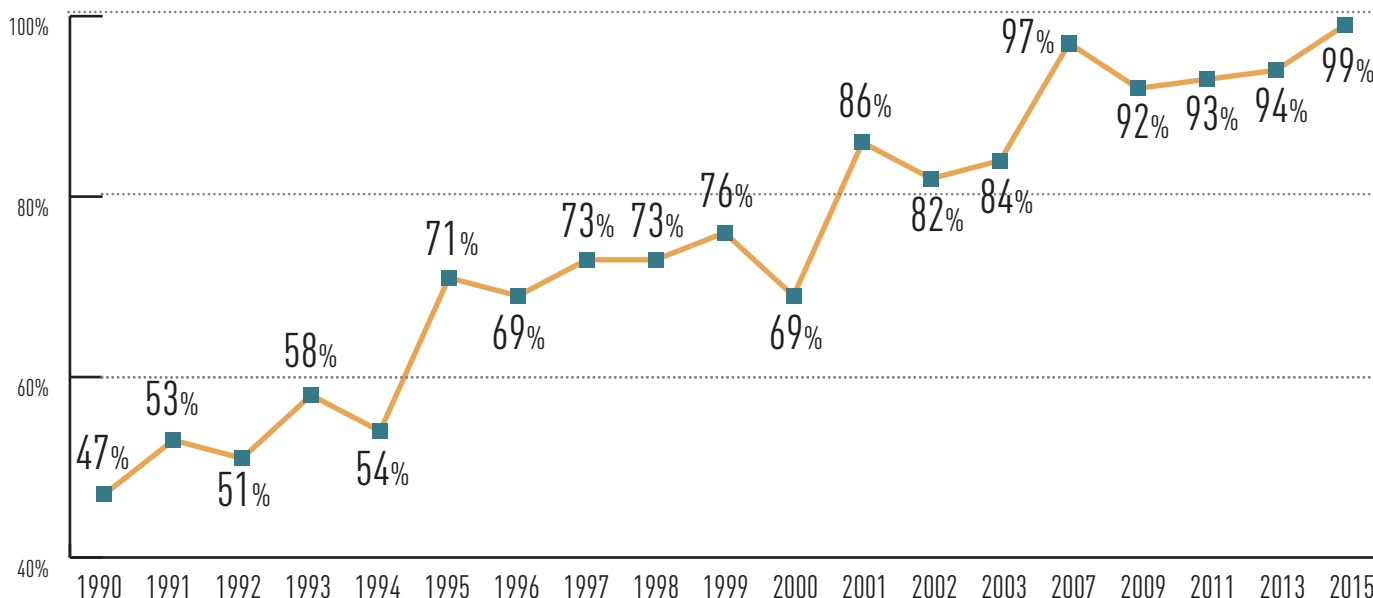
2013 Average

\$618

If you purchase A/M crash parts, why?



Percentage of shops that purchase A/M crash parts, 1990-2015.



Purchasing

Equipment owned	Percent Owning	Plan to Purchase
Dedicated bench	42%	3%
Drive-on rack	53%	3%
Universal bench	38%	2%
Computerized measuring	47%	11%
Mechanical laser system	26%	11%
Scan tool	56%	2%
Vehicle lift	64%	5%

	Percent Owning	Plan to Purchase
Central vacuum system	17%	9%
Infrared heat lamp	59%	5%
Squeeze-type resistance spot welder	42%	17%
Recycling equipment	35%	9%
Crossdraft booths	33%	0%
Downdraft booths	53%	6%
Prep station	49%	5%



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Personnel

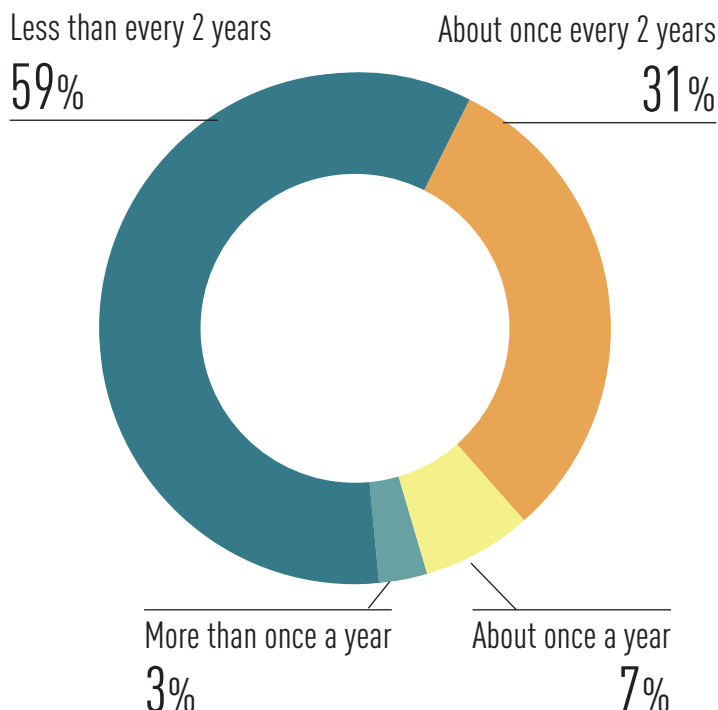
Tech Salaries and Compensation Methods

(Median means 50% of responses were above this answer and 50% were below.)

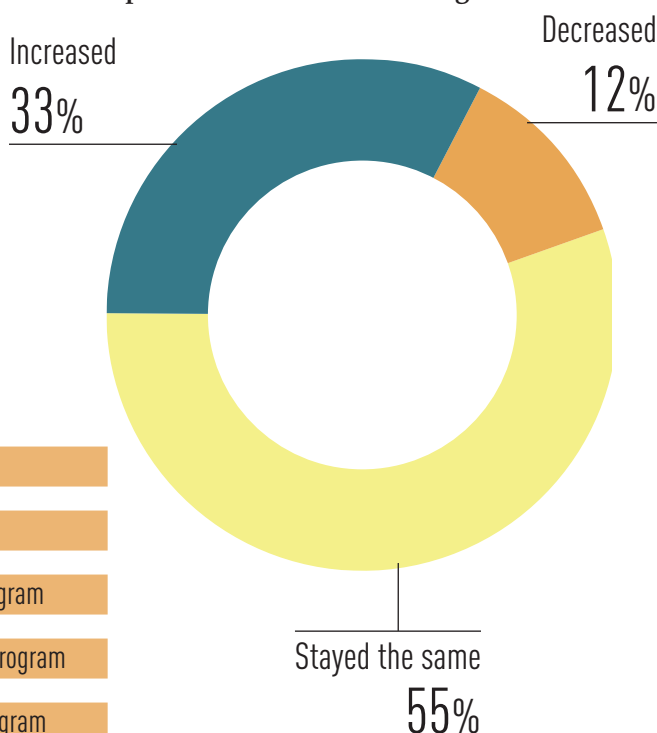
Median Annual Salary	
Metal tech	\$58,080
Painter	\$61,940
Mechanic	\$50,000
Entry-level painter/tech	\$30,000
Office manager	\$40,500
Senior estimator	\$60,000

Compensation Method		
73%	60%	33%
Hourly wage	Flat rate	Salary
21%	22%	7%
Hourly plus commission	Salary plus commission	Percentage of shop labor
	6%	
	Other	

How often do you have to replace a technician?



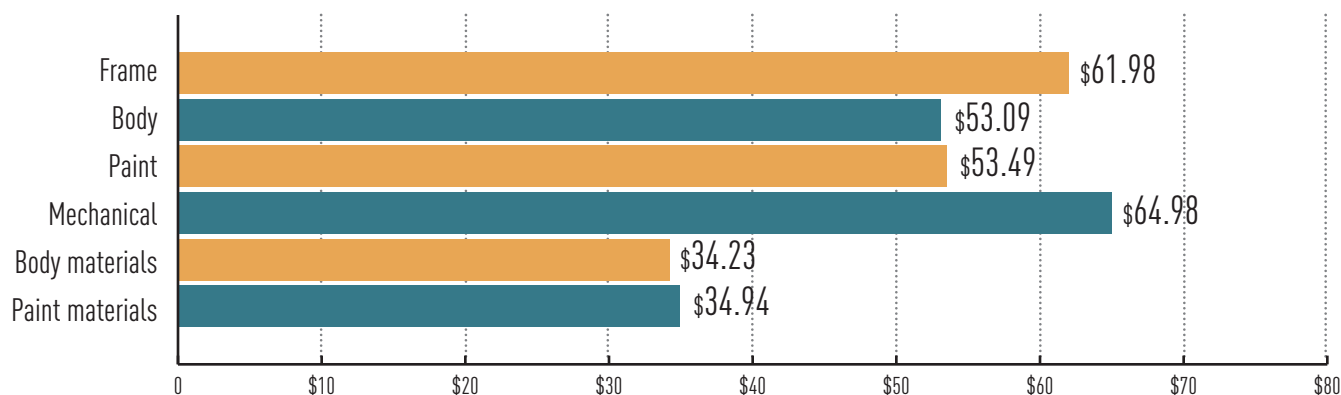
In the past 12 months, has the size of your production workforce changed?



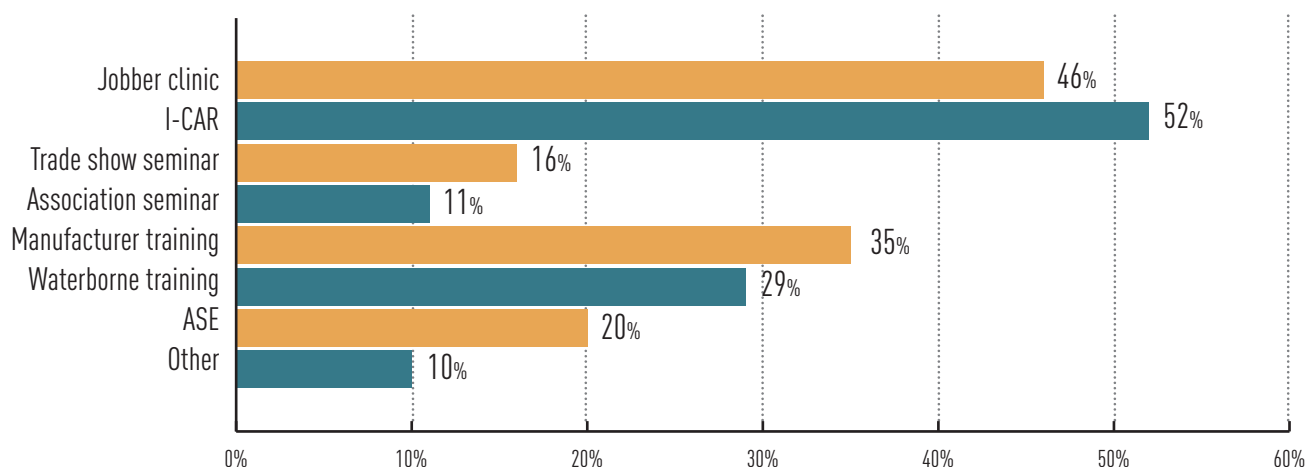
People by the numbers

41	Average age of production personnel
12.5	Average number of employees per shop
27	Percentage of shops hiring techs from high school vo-tech program
19	Percentage of shops hiring techs from post graduate vo-tech program
19	Percentage of shops hiring techs from in-house apprentice program

What are your posted rates per hour?



Type of training your employees have attended in the past year.



How many days has your shop collectively spent in training sessions/seminars in the past year?

