



Comparative Survey Results

Presentation by the
Industry Trends Committee
January 14, 2010



INDUSTRY TRENDS

■ Committee Members:

- ◆ Jordan Hendler - Chair
- ◆ Karen Fierst – Co-Chair
- ◆ John Bosin
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INDUSTRY ISSUES COMMITTEE

- Purpose: Track, analyze and report CIC body trends on issues chosen by the body in January 2009.
- Method: Develop segment specific surveys, survey CIC body electronically and track results over time.
- Compare CIC trend results to industry surveys conducted by other sources (i.e. Information providers and associations)

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■ So Far...

- ◆ Identified the top industry issues on which to collect data and track trends. Topics taken from January 2009 CIC meeting suggestions.
- ◆ Identified possible industry sources to which to compare data.
- ◆ Sent baseline survey to repairers. Reported on it in July 2009. Second survey will be reported on today.
- ◆ Next survey will go to insurers and reported on in April.

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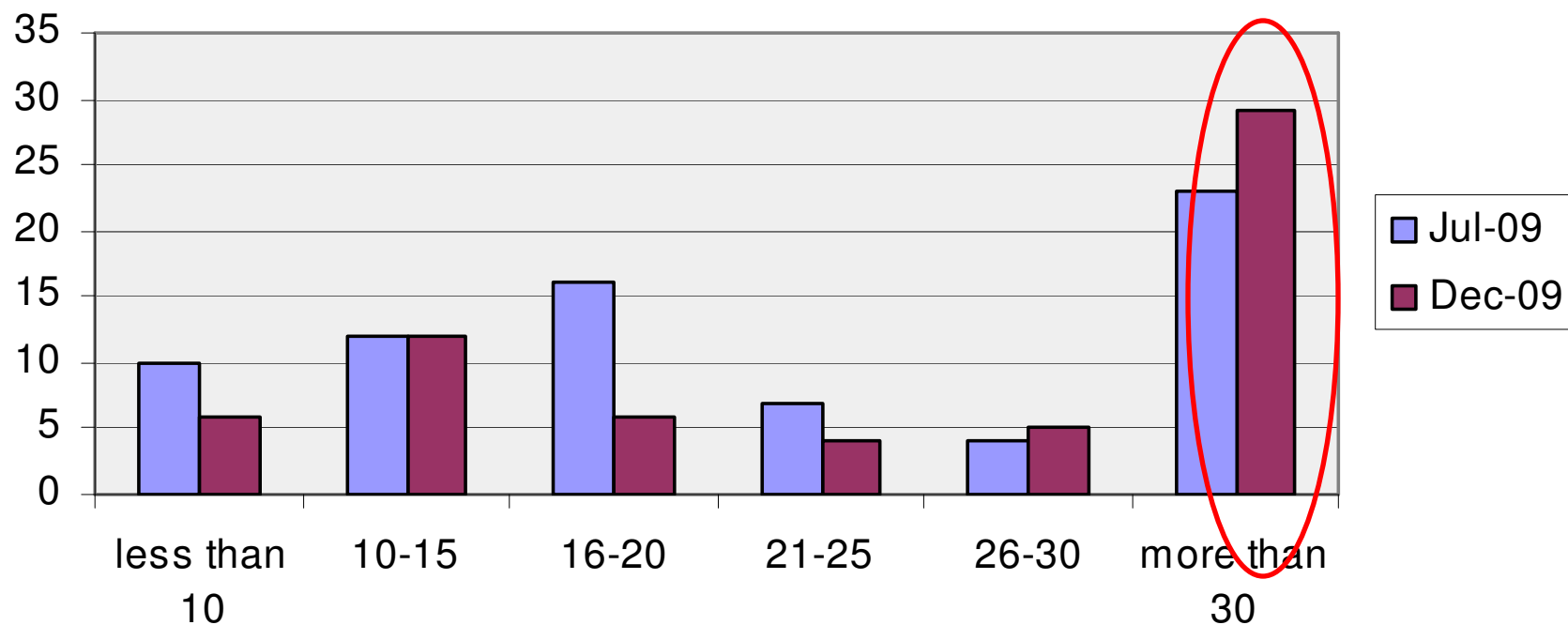
■ Introduction to the Survey

- ◆ This particular survey was for Collision Repairers Only! (*Future surveys will be directed towards other industry segments.*)
- ◆ The baseline survey was conducted in Spring 2009 and reported on in July. This survey compares those results to a more recent survey.
- ◆ This survey was conducted in December 2009 and closed on January 6th.
- ◆ The next collision repairer survey will be reported on in July.

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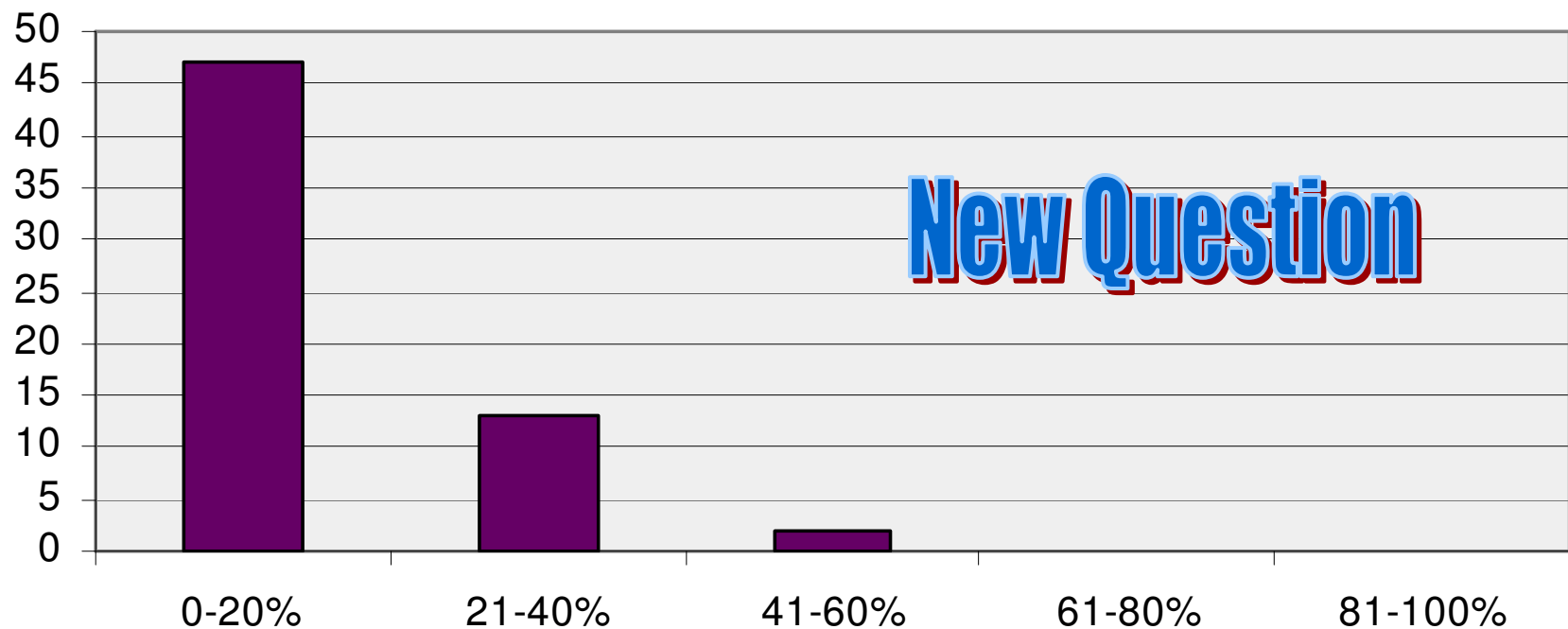
- 1. What is your average monthly number of repair orders that are customer pay?



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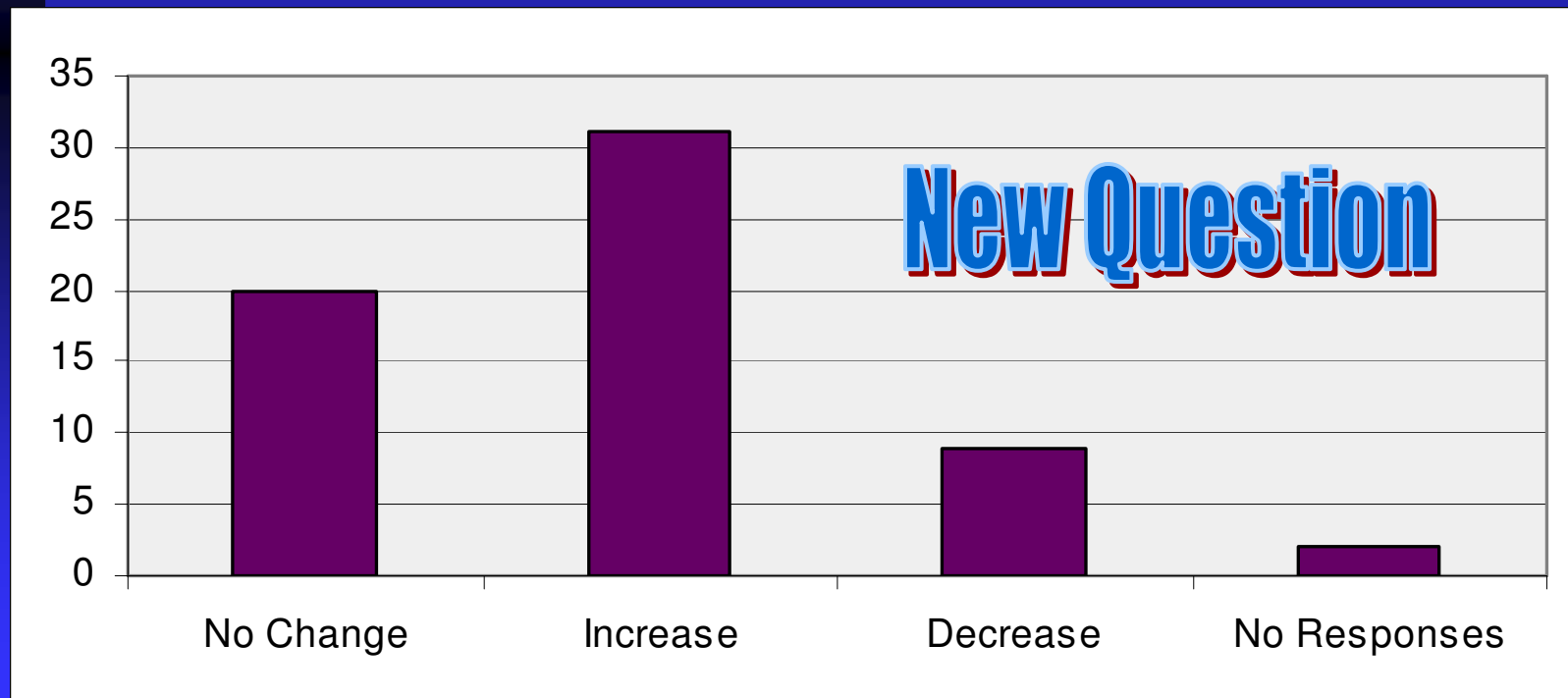
- 2. What is your monthly average percentage of repair orders that are customer pay?



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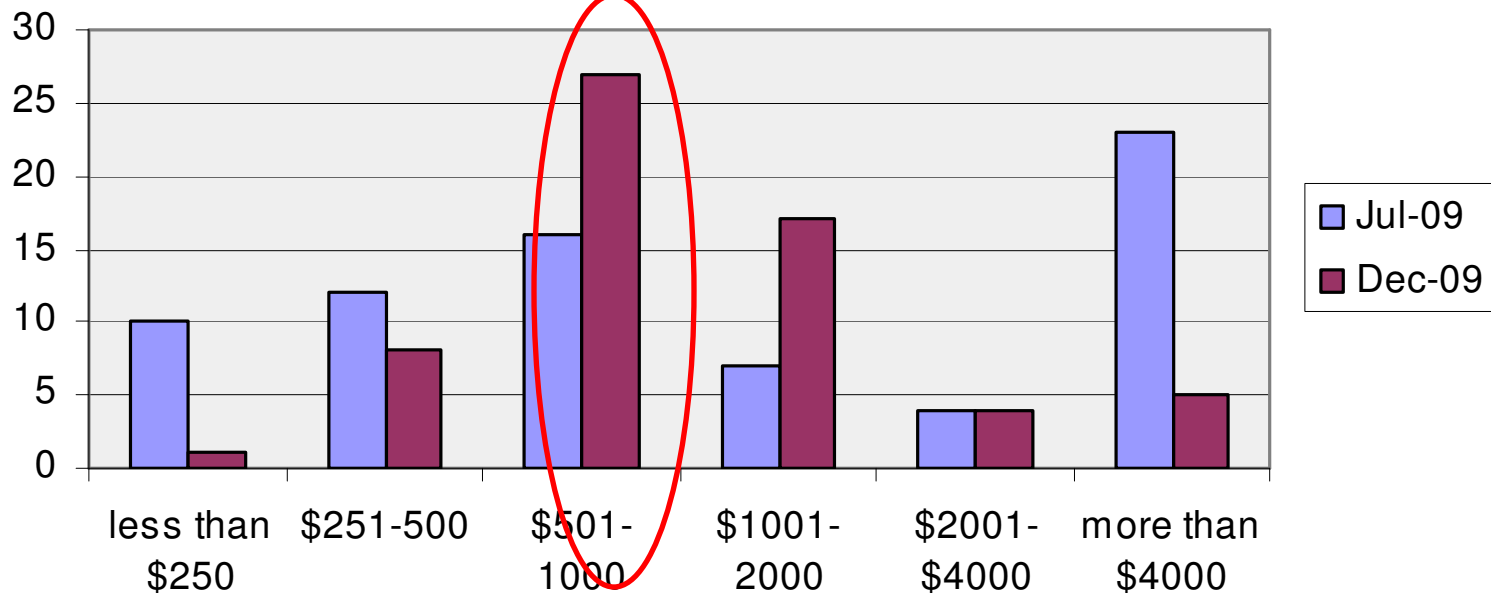
- 3. Has your monthly average percentage of repair orders that are customer pay increased or decreased in the past 6 months?



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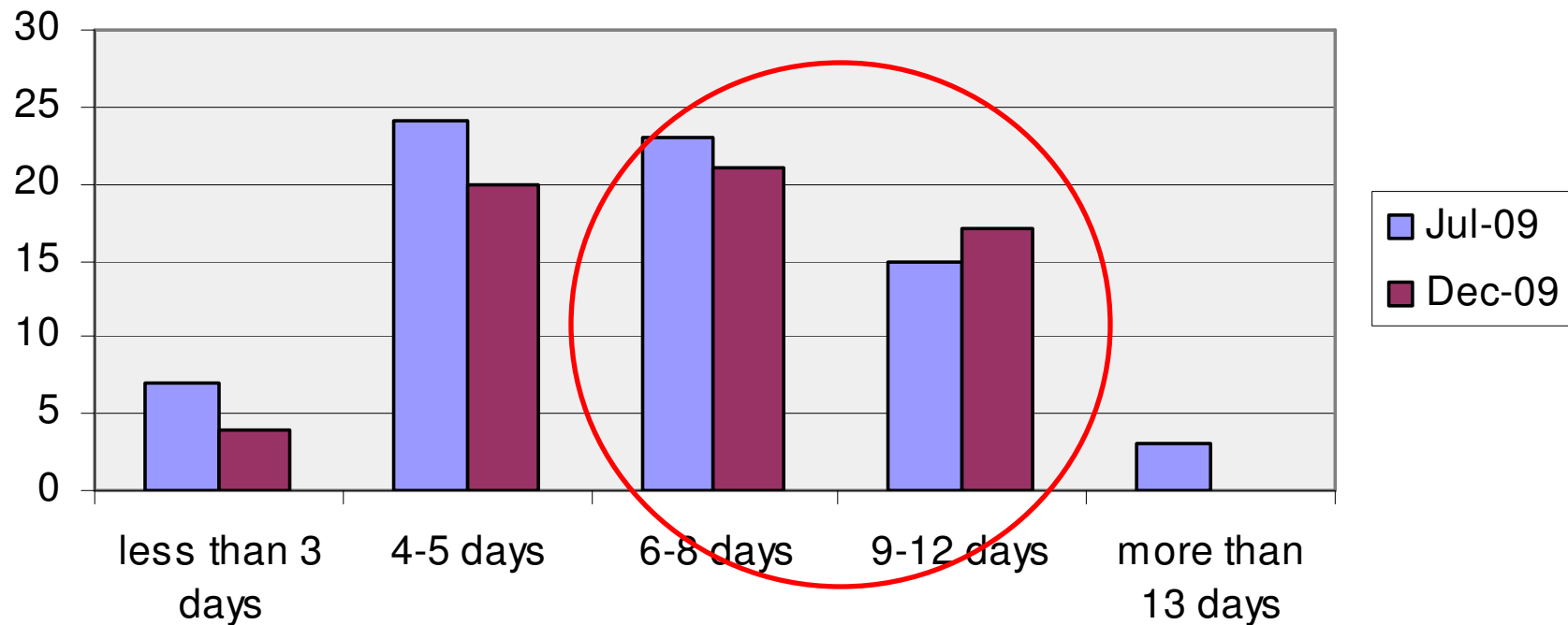
- 4. What is the average monthly dollar amount of repair orders that are customer pay?



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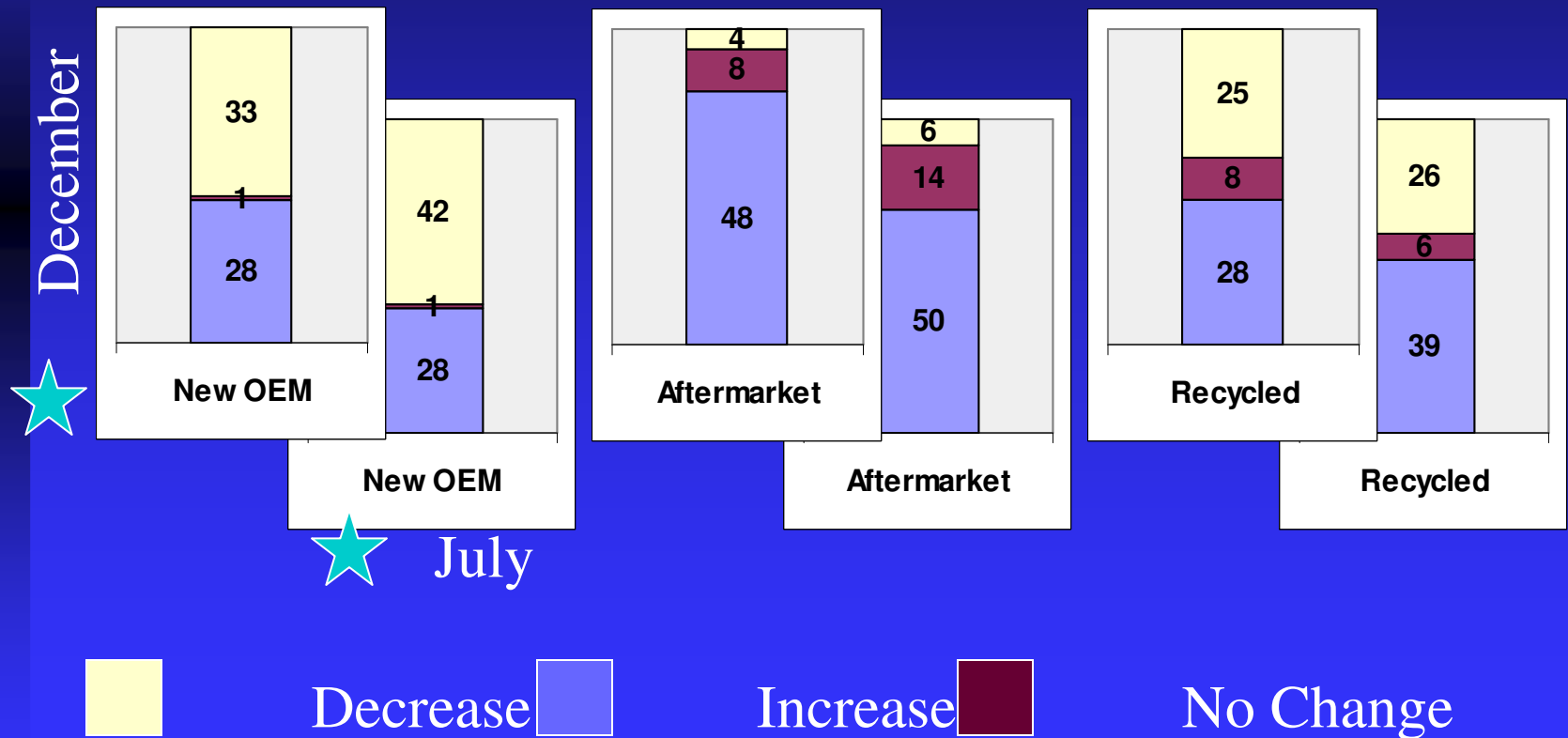
- 5. What is your current average cycle time?



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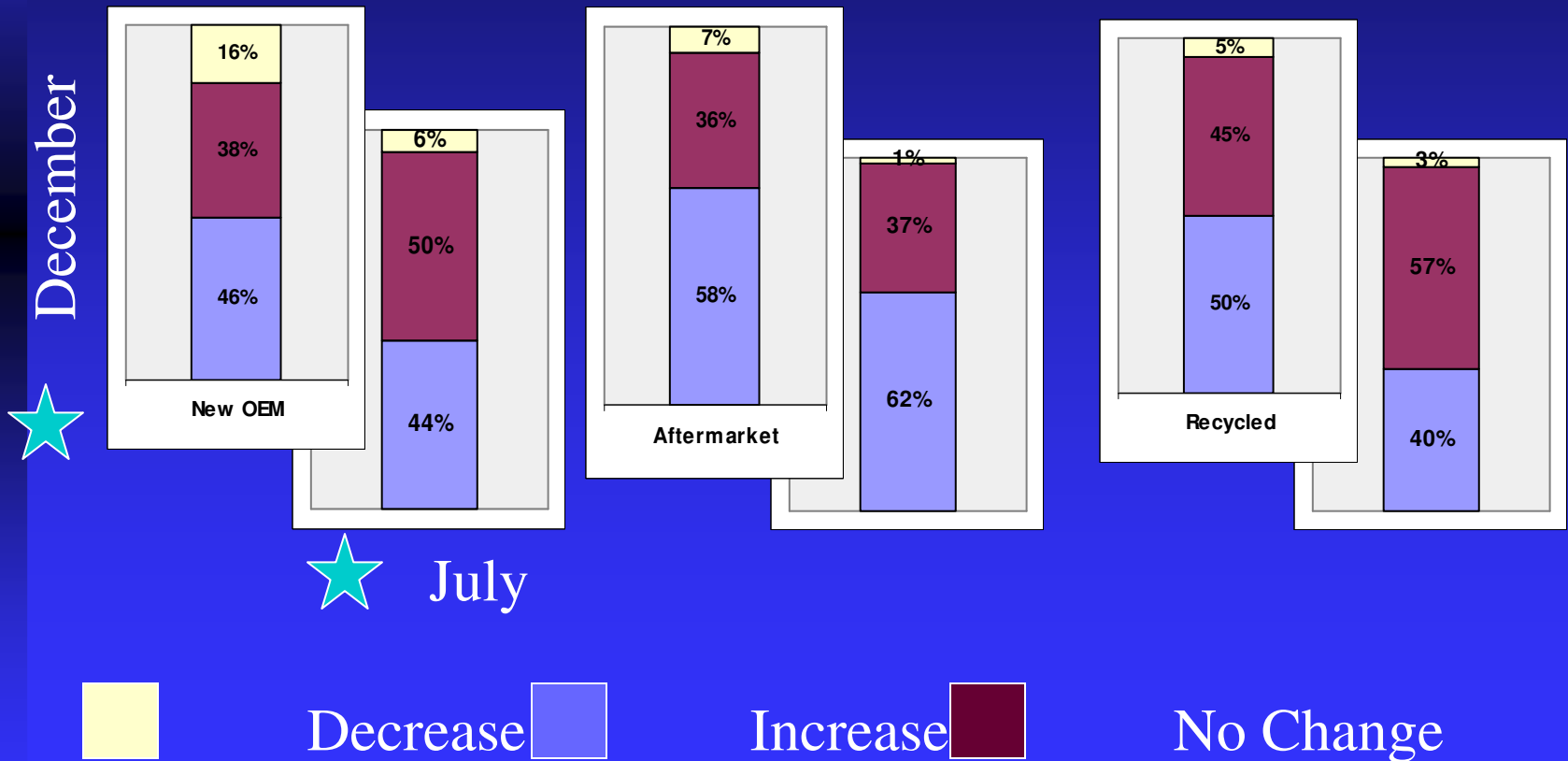
- 6. Have you noticed an increase or decrease in parts availability?





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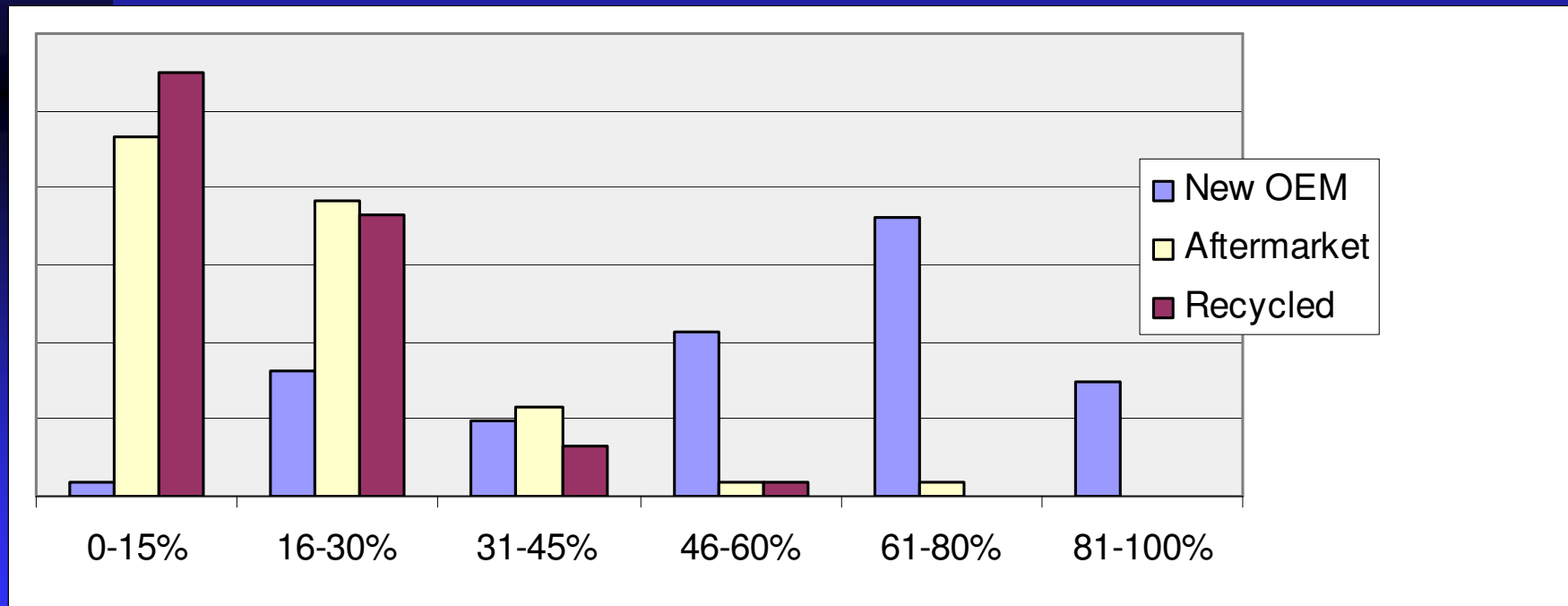
- 7. Have you noticed an increase or decrease in parts prices?



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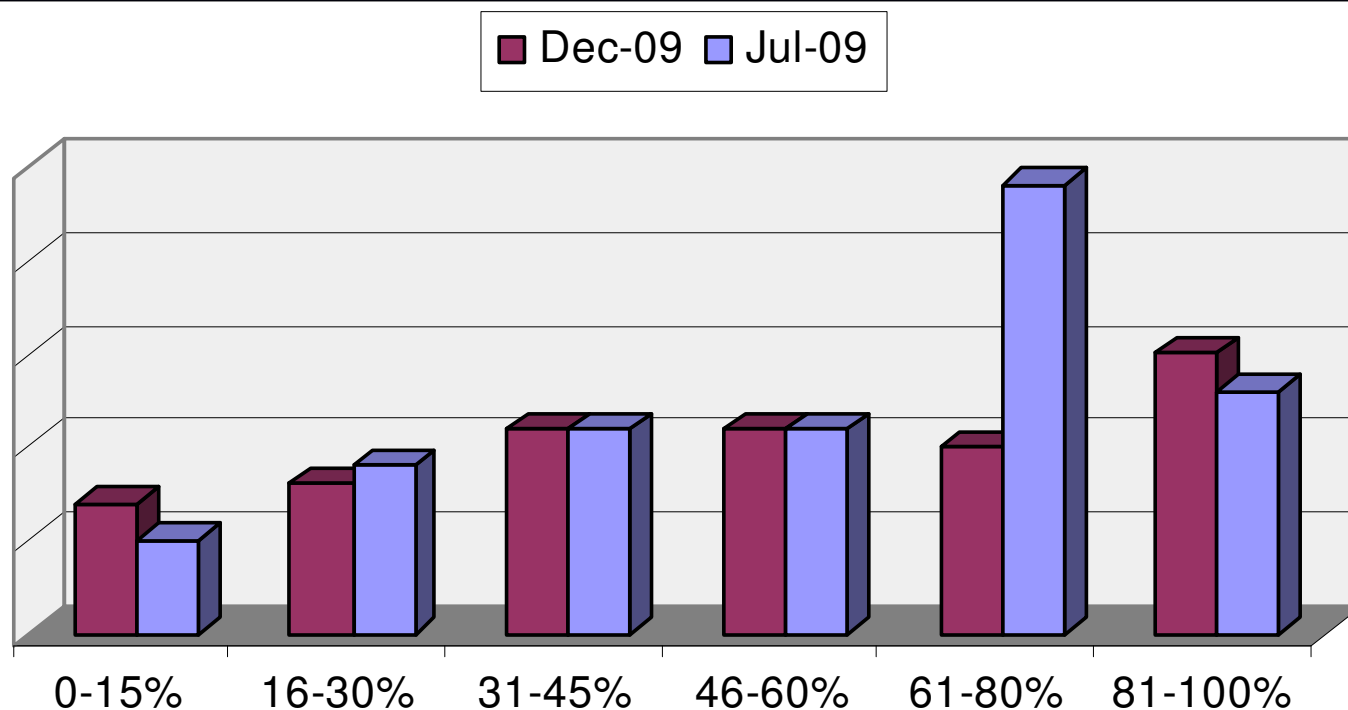
- 8. What is your percentage of gross parts dollars usage for each parts category?



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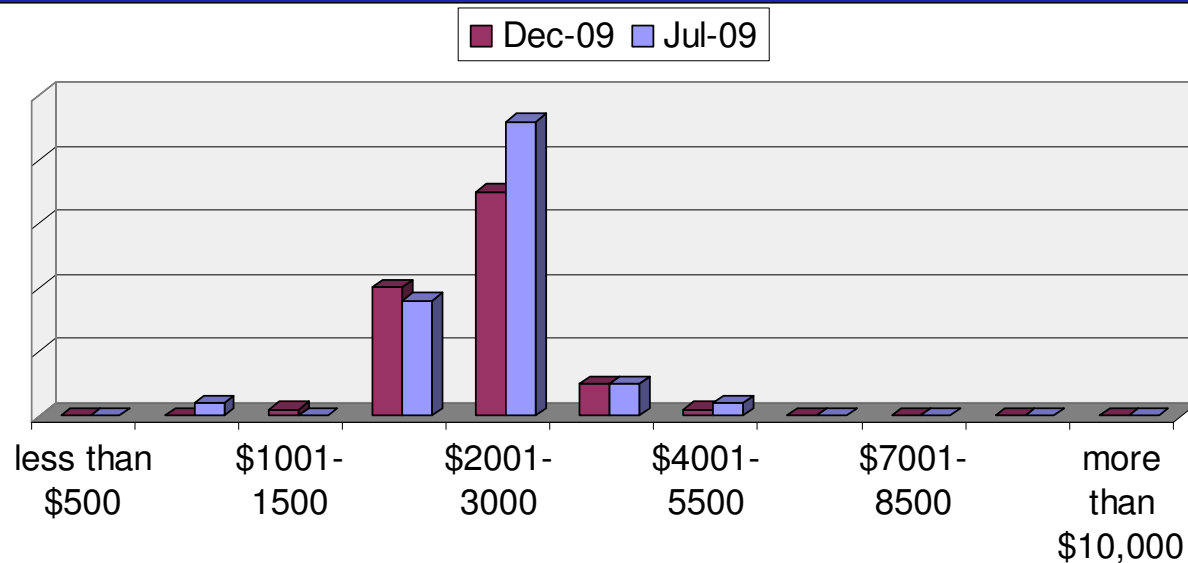
- 9. What is the average percentage of repair orders for which you produced a supplement?



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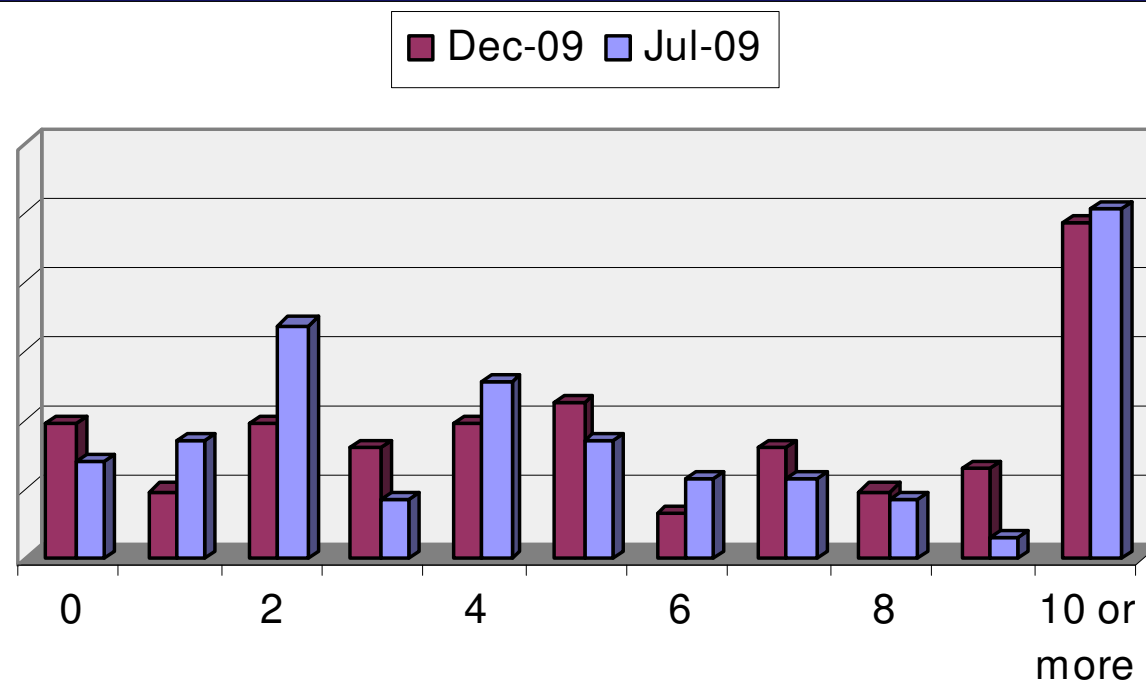
- 10. What is your average repair order dollar amount?



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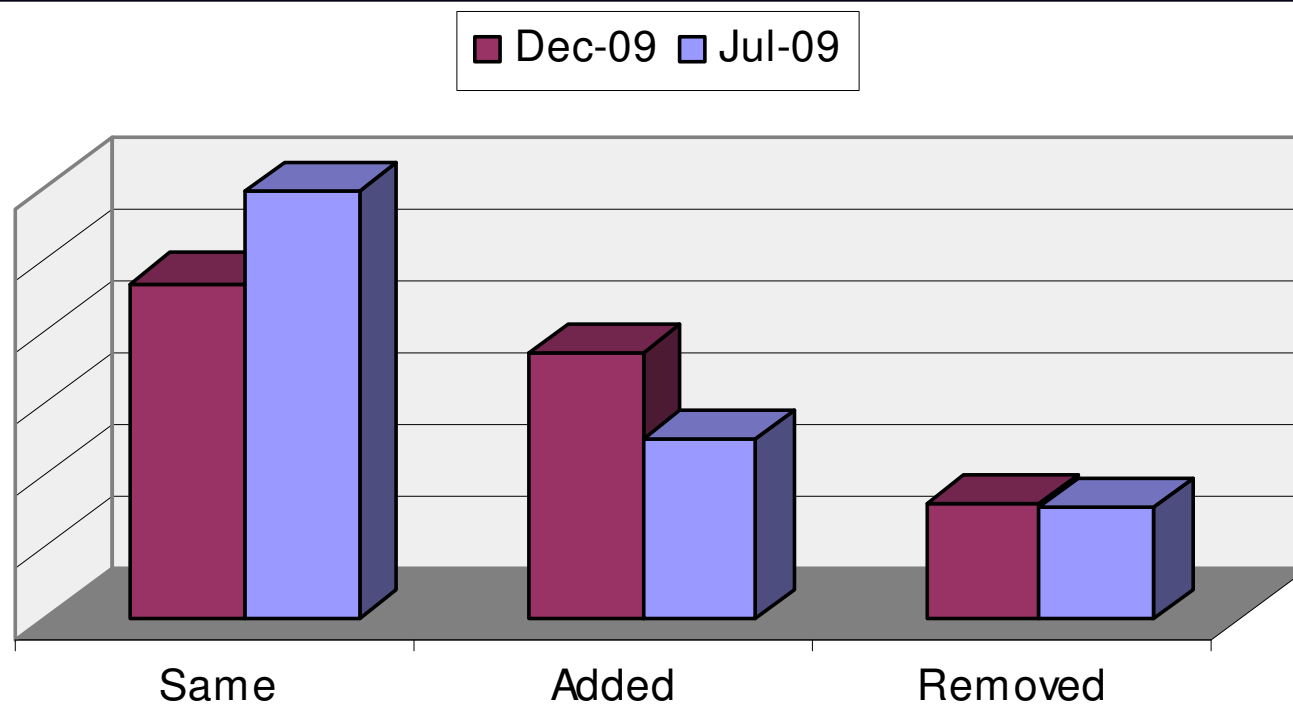
- 11. What is the number of direct repair programs in which you currently participate?



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- 12. Have you added or removed any direct repair programs in the last six (6) months?

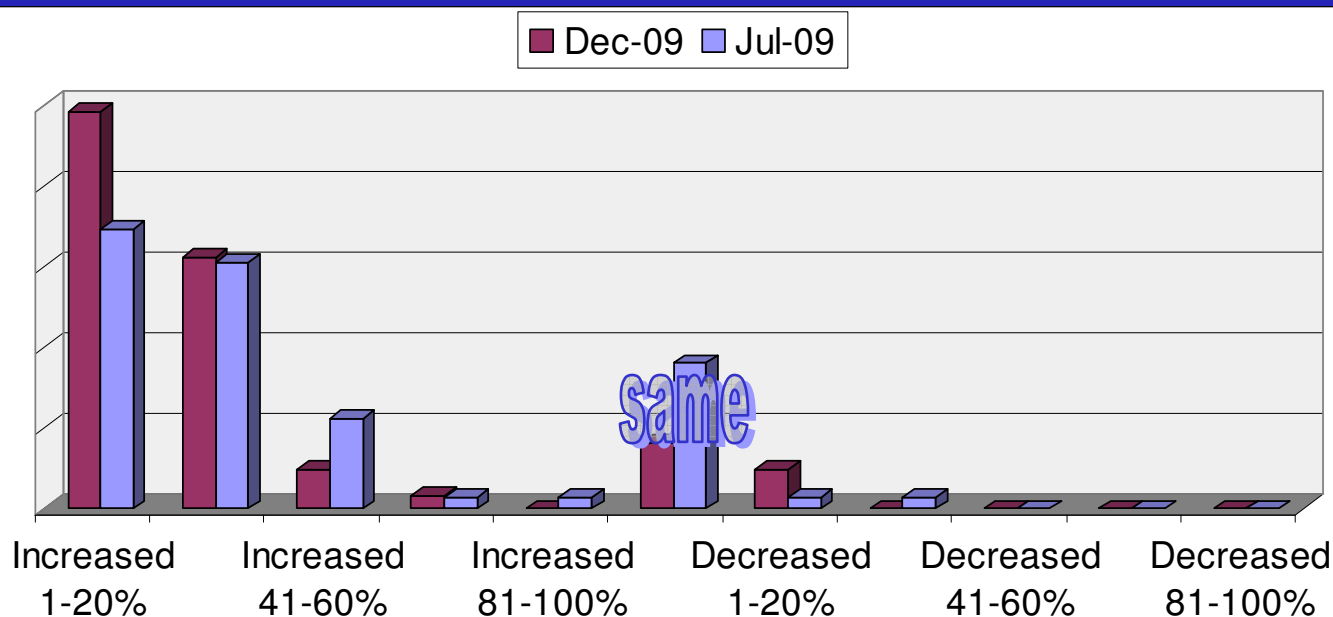


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- 13. Has there been an increase or decrease in total losses you have processed in your shop?

You may use the following answers to indicate a value, or same. The percentage of increase or decrease should be relative to 2nd Quarter 2009.



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■ To come ...

- ◆ A baseline survey is being developed for the Insurance Industry.
- ◆ Other industry segments will be surveyed in the future.
- ◆ The repairer survey will be repeated and reported upon again at the July meeting. Emerging trends may result in new questions being asked in the future.

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