



G'DAY  
From  
AUSTRALIA  
&  
NEW ZEALAND

# Australia

- 21 million + population
- 12 million car parc
- 2 Major Insurers, IAG and Suncorp/Promina Group
- 4000 approx shops and declining
- Millions of Kangaroos! (good for business)



# New Zealand

- 4.3 million population
- 2.75 million car parc
- Major Insurers, IAG, AMI, Vero and Lumley
- 1100 approx shops and declining
- Millions of sheep (good to eat!)

# **New Zealand Industry Update**

**The market does not have the problems that Australia has with insurers, the relationship in fact is quite good but Insurers are now tightening up on the industry**

**Earthquake 6.3 in Christchurch 22<sup>nd</sup> February**

**Loss of life and the CBD devastated**



# Industry Update Australia 2011

**Collision Repair Expo  
Insurer activity**

**I-CAR**

**Right to Repair Issue**

**Online Insurance**

**Non Repairable Write off**

# Collision Repair Expo 2011

Similar to SEMA on a much smaller scale. We have around 12,000 attendees and the Collision Repair Expo is combined with the Aftermarket Expo.

This year we had a collision industry forum where Jeff Hendler and I moderated two panels...

# Collision Repair Expo 2011

The first panel comprised paint companies, equipment and consumable suppliers discussing future technology.

The second comprised three shop owners from Australia, New Zealand and the USA talking about the industry challenges and the future of the industry...









# NCR Lifetime Achievement Awards 2011



Mark Brady



Lance Weiss

# NCR Lifetime Achievement Awards 2011







Barry Dem  
Dem's Body & Paint

Gary Wano  
G W Wano & Son

Aaron Clark  
Collision Solutions

Steve Noyer  
Moselle Panel & Paint















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US  
Rednecks  
on Tour  
Down  
Under

# Insurer Activity

**We currently have three insurers  
planning to change the way they do  
business with repairers...**

**NRMA, Suncorp and CGU**

# NRMA

Has held meetings with repairers to explain that they wanted repairers to submit RFP's (Request for Proposal) They want repairers to put in writing to them how they want to do business with them and what they offer them and their customers...



# Suncorp

## New Three Year Plan

- Building business partnerships
- Improving communications with repairers
- Enhancing industry skills
- Contributing to a long term workforce



# However!

They are supporting and supplying  
a company called Capital S.M.A.R.T  
Repairs



# CGU

October 11, 2011

CGU recently decided that in future it will not operate a Network Smash Repairer Scheme and existing CGU Preferred Smash Repairer agreements will not be renewed when they expire.

The dates agreements in each State expire are as follow:

October 28, 2011 – South Australia

June 30, 2012 - Northern Territory, Tasmania, Western Australia, Queensland

September 30, 2012 – New South Wales

June 30, 2013 - Victoria

Although your agreement may not be due to expire for some time, we wanted to give you advance notice of this change.

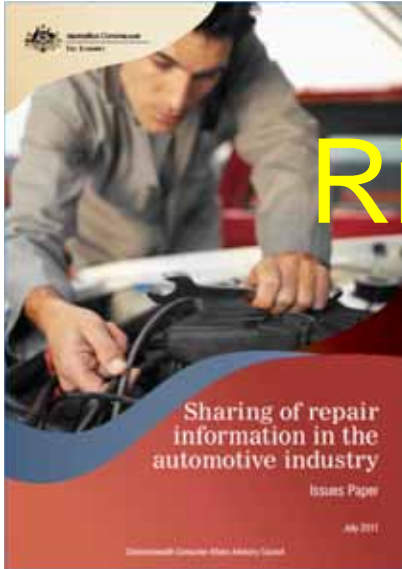
Attached is a copy of a communication which was recently sent to CGU Preferred Smash Repairers in South Australia which sets out the reasons for this decision.

I would like to stress that even though CGU will not have formal agreements with repairers we will continue to direct customers to repairers who provide us with the best cost, quality and timeliness outcomes.

We appreciate the assistance you have provided to CGU and our customers and trust you will understand why we have chosen not to renew PSR agreements. We look forward to continuing our good working relationship in the future.

# I-CAR

**I-CAR has been available in NZ for 20 years and in Australia for more than 5 years. Both are going very well and will continue to grow as technology continues to change.**



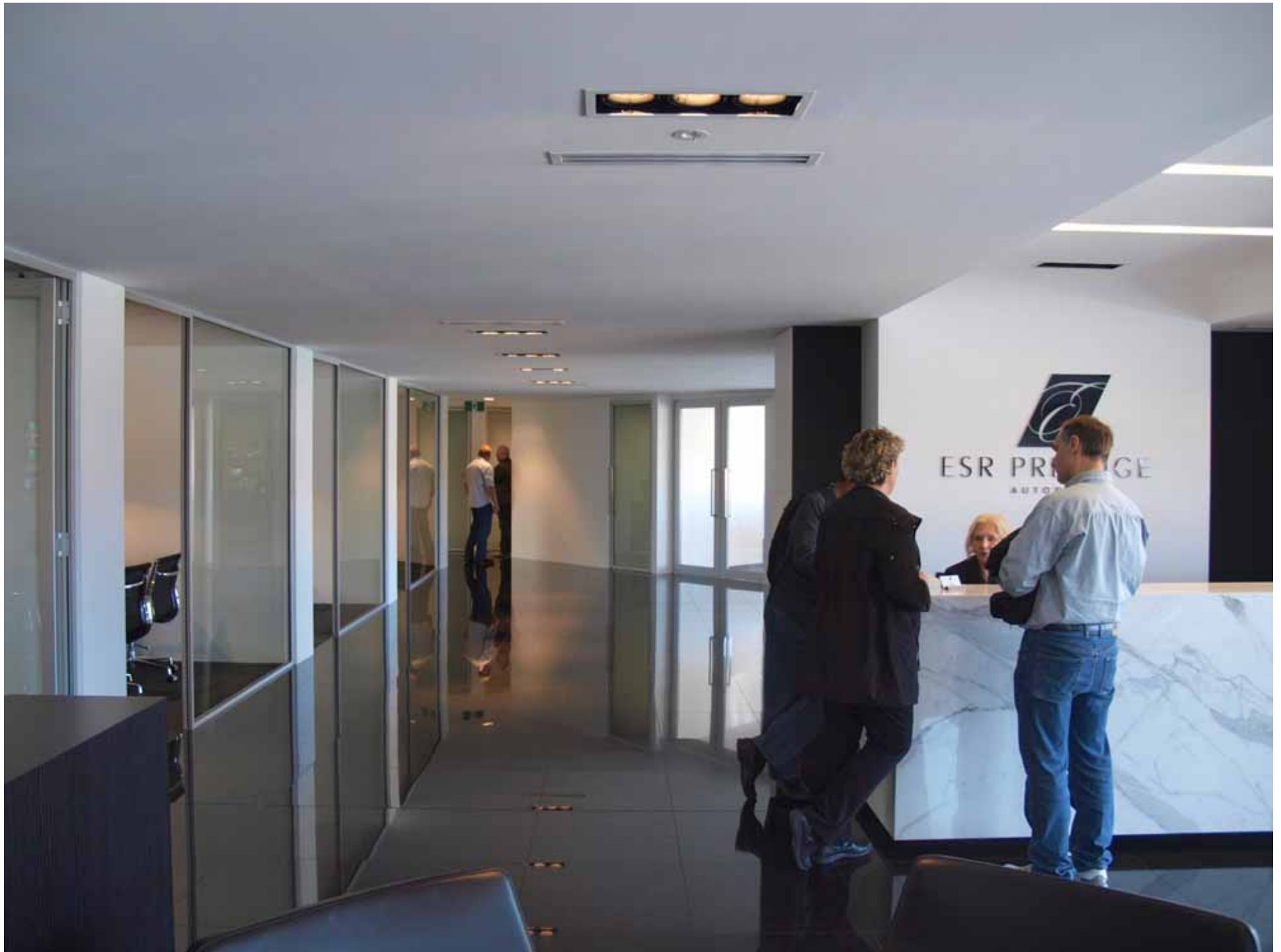
# Right to Repair Legislation

The Industry is looking for the availability of repair information from vehicle manufacturers. Government has now received information from all stakeholders in the industry. A conference was held recently where stakeholders debated the issues.

# Online Insurance

**In Australia we are seeing more and more online insurers appearing. The major insurers now see this as a threat and are marketing their own online insurance aggressively**

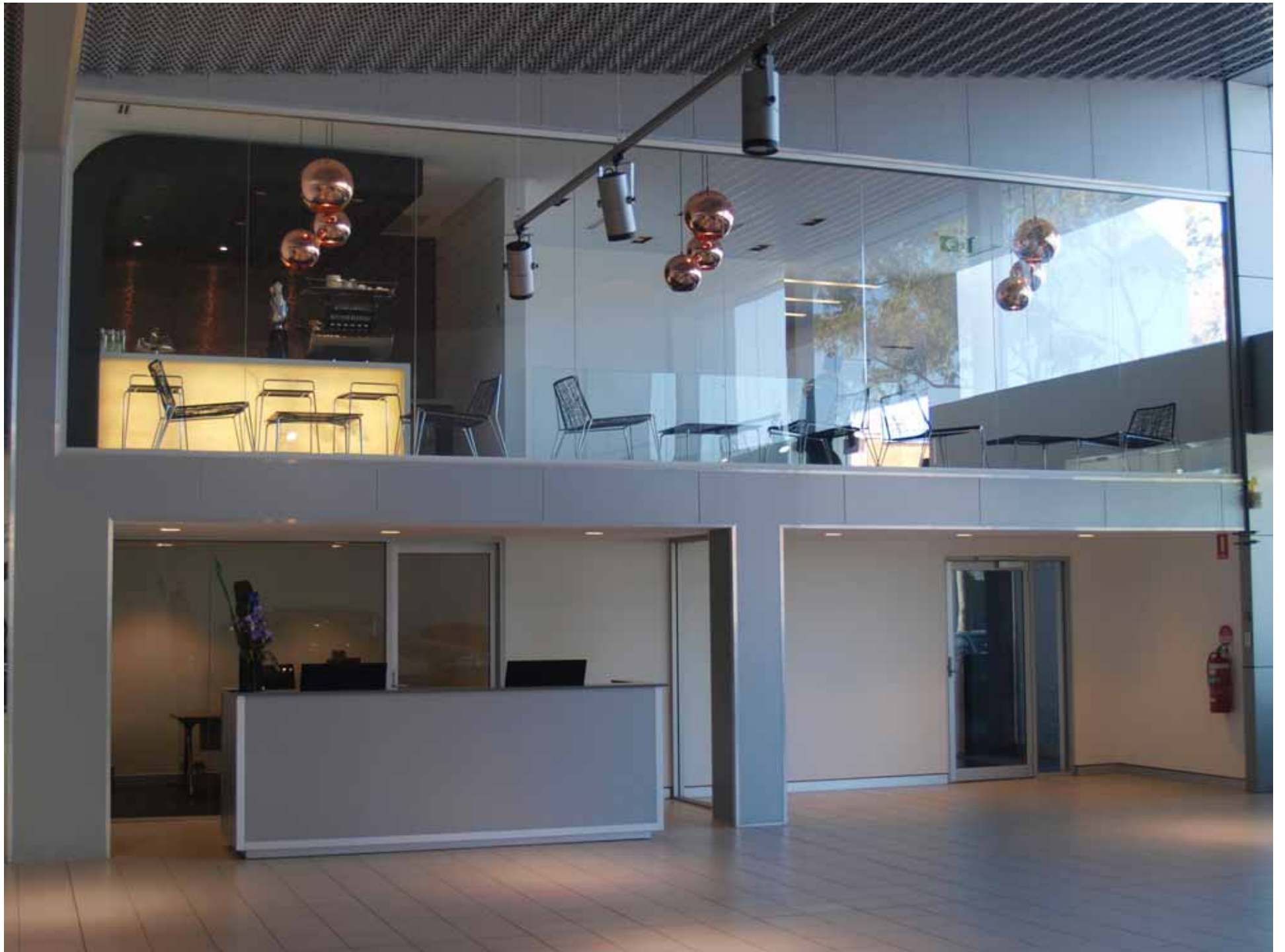
Non-Repairable Write off  
Legislation is now  
working in NSW













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# That's It!

Thank you to CIC and Michael for allowing me to talk to you today. I regard America as my second home and all of you as my friends, have a great SEMA.