



Inaugural Survey Results

Presentation by the
Industry Trends Committee

July 30, 2009

INDUSTRY TRENDS



- Committee Members:
 - ◆ Jordan Hendler - Chair
 - ◆ Karen Fierst – Co-Chair
 - ◆ John Bosin
 - ◆ Charles Dillard
 - ◆ Gene Hamilton
 - ◆ Alan Murdy
 - ◆ Bob Keith
 - ◆ Kurtis Keala
 - ◆ Ray Fratella
 - ◆ Rick Tuuri

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■ So Far...

- ◆ Identified the top industry issues on which to collect data and track trends.
- ◆ Performed the inaugural survey by the committee as a baseline for the CIC collision repair participants with fantastic results!
- ◆ Why did we do the survey?

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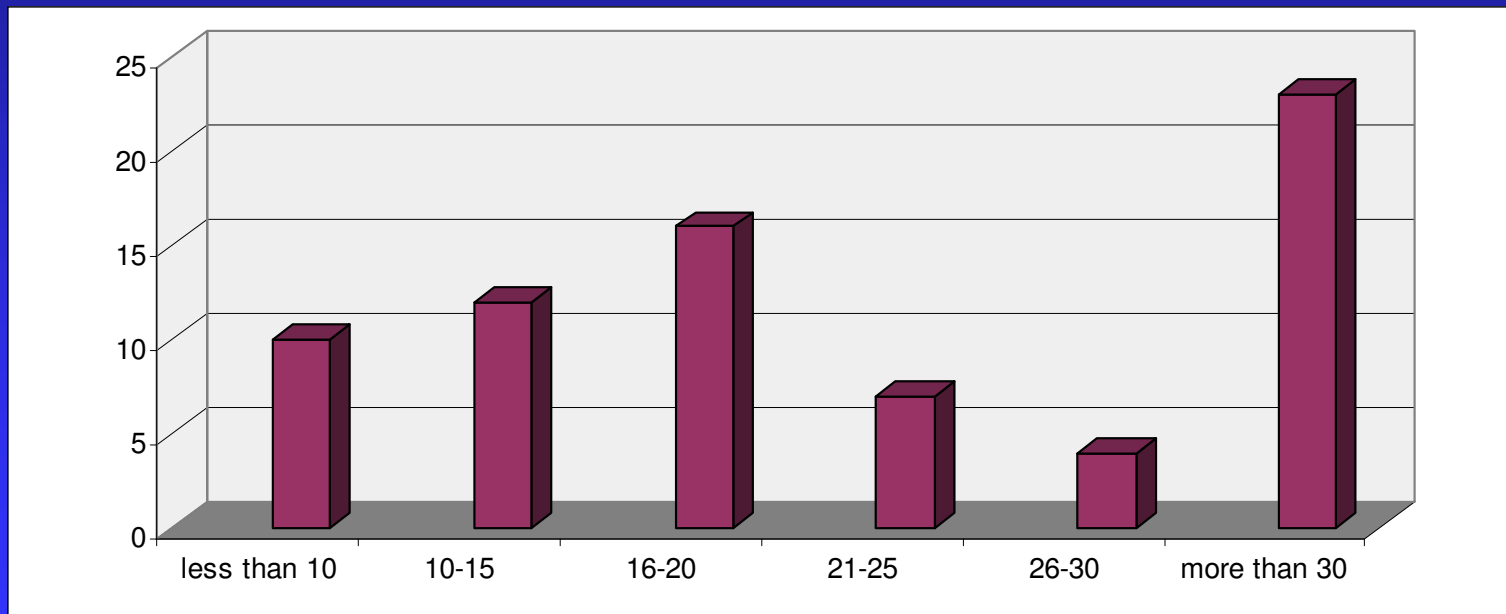
■ Introduction to the Survey

- ◆ This particular survey was for Collision Repairers Only! (*Future surveys will be directed towards other industry segments.*)
- ◆ This survey will be the basis for adding future data for comparison.
- ◆ This survey was closed on July 17th .
- ◆ The next collision repairer survey will open in November.

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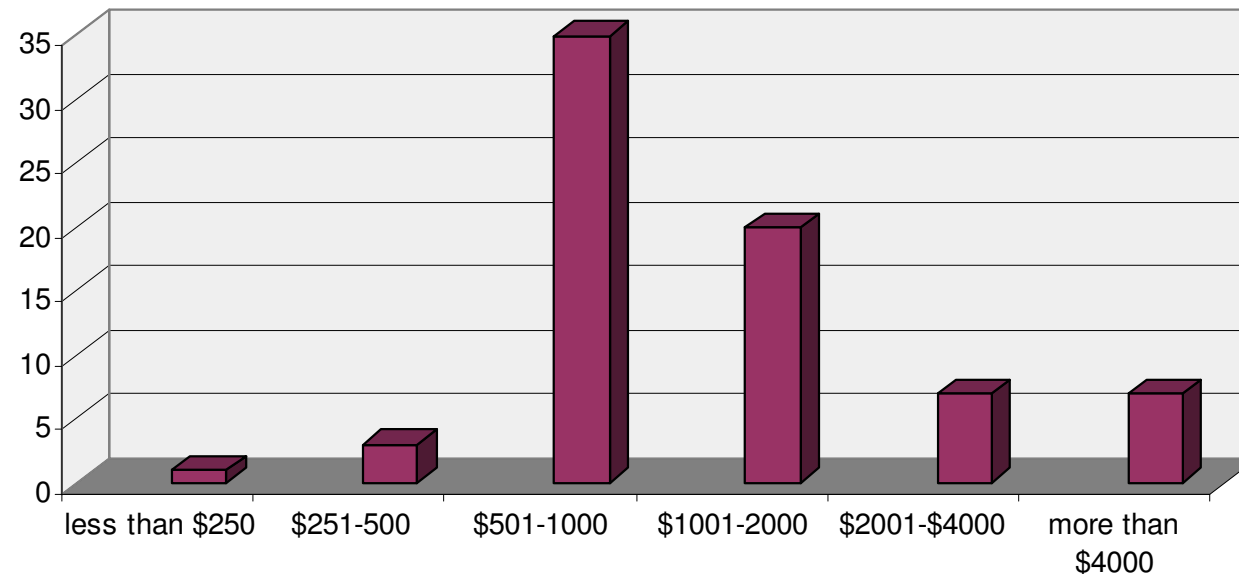
- 1. What is your average monthly number of repair orders that are customer pay?



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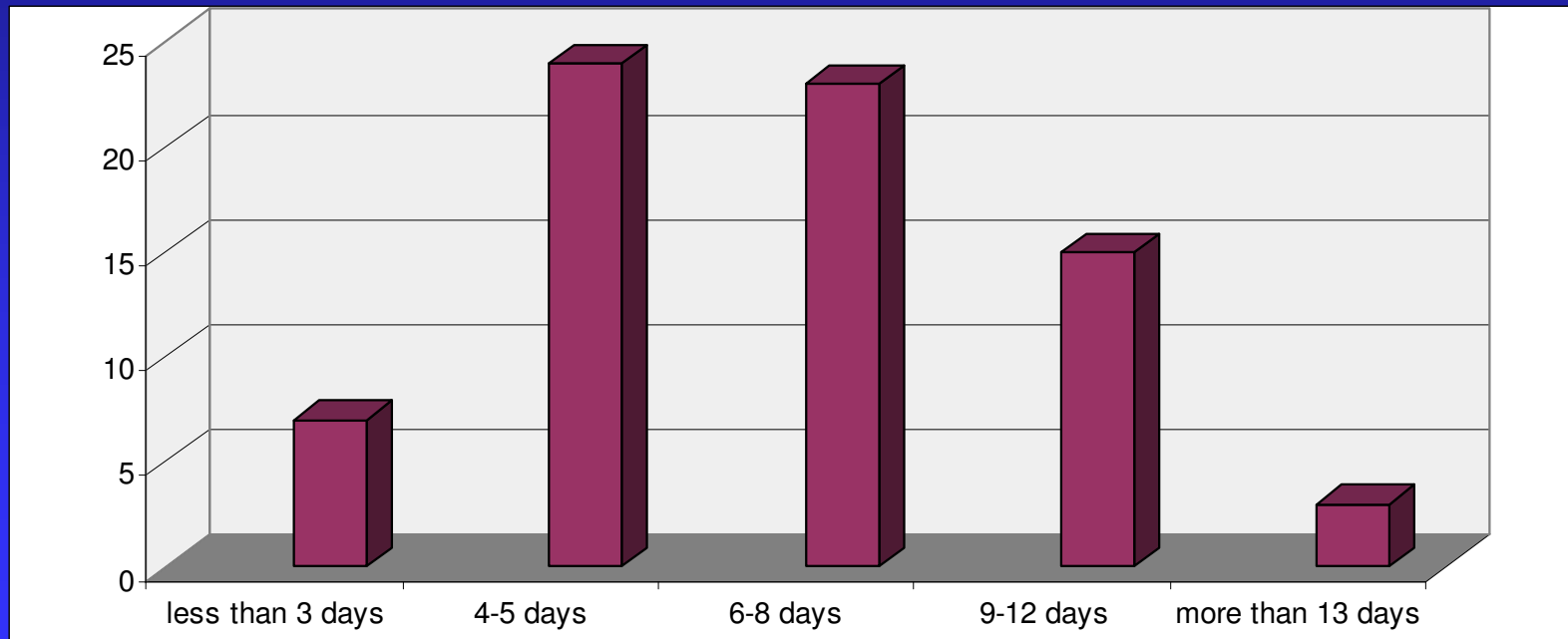
- 2. What is the average monthly dollar amount of repair orders that are customer pay?



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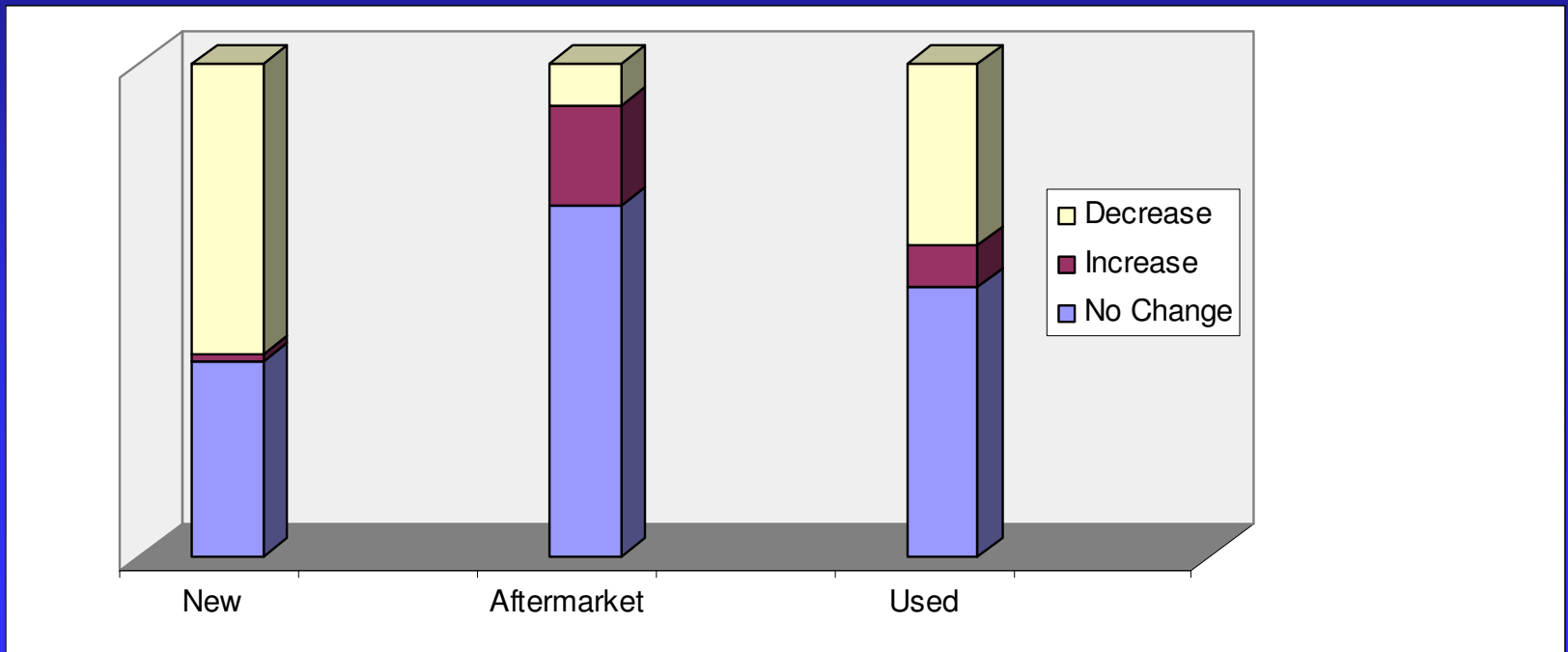
- 3. What is your current average cycle time?



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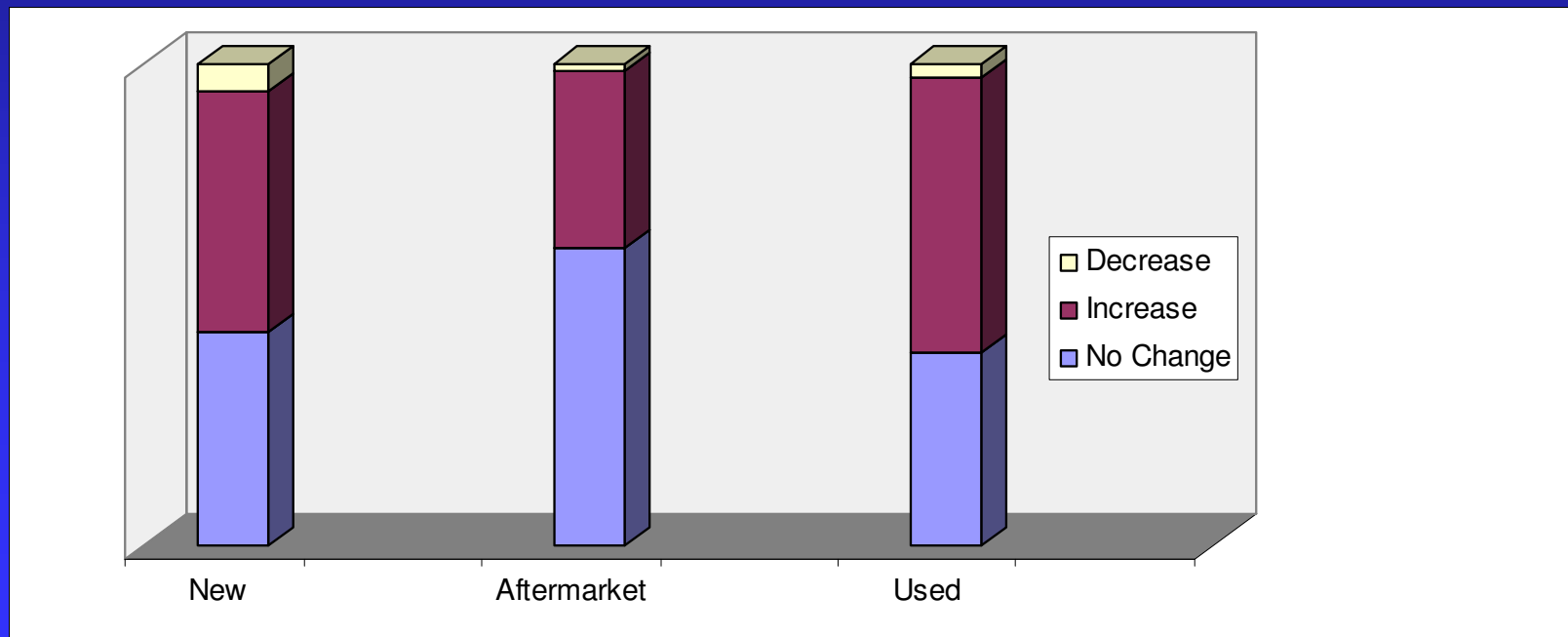
- 4. Have you noticed an increase or decrease in parts availability?



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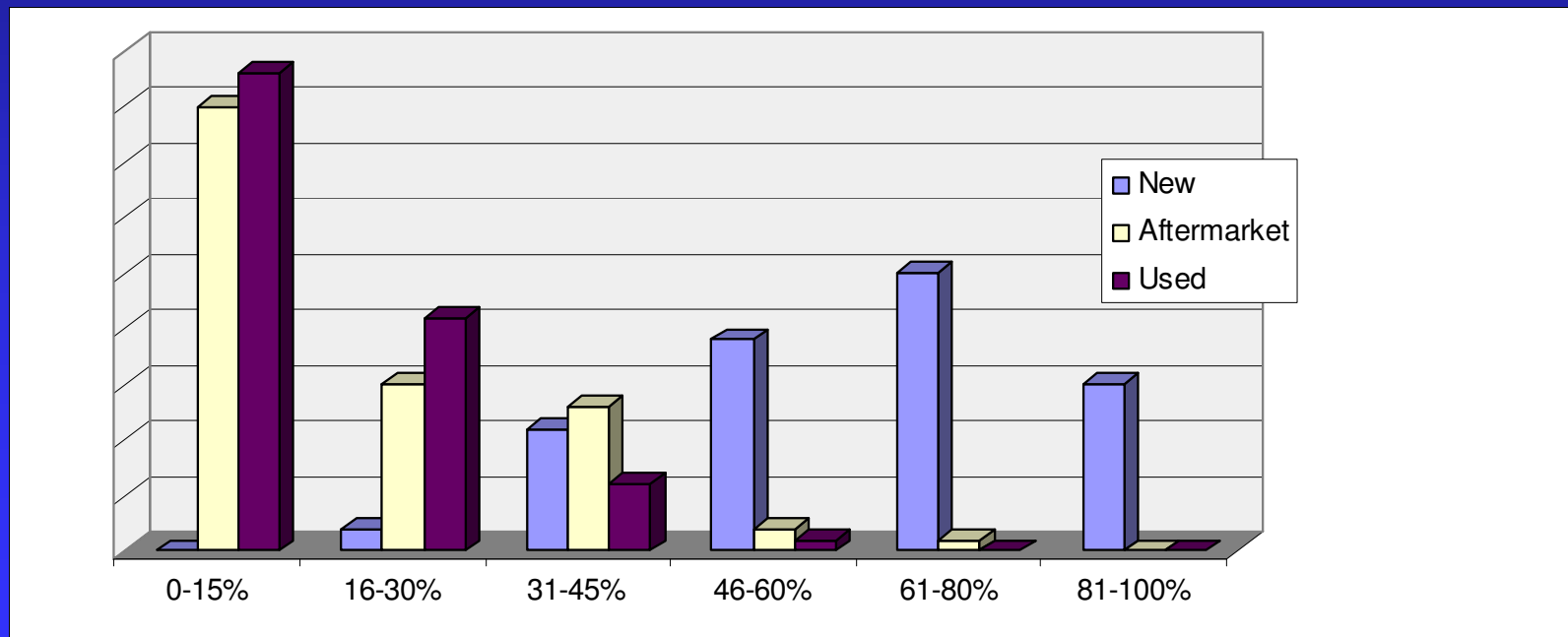
- 5. Have you noticed an increase or decrease in parts prices?



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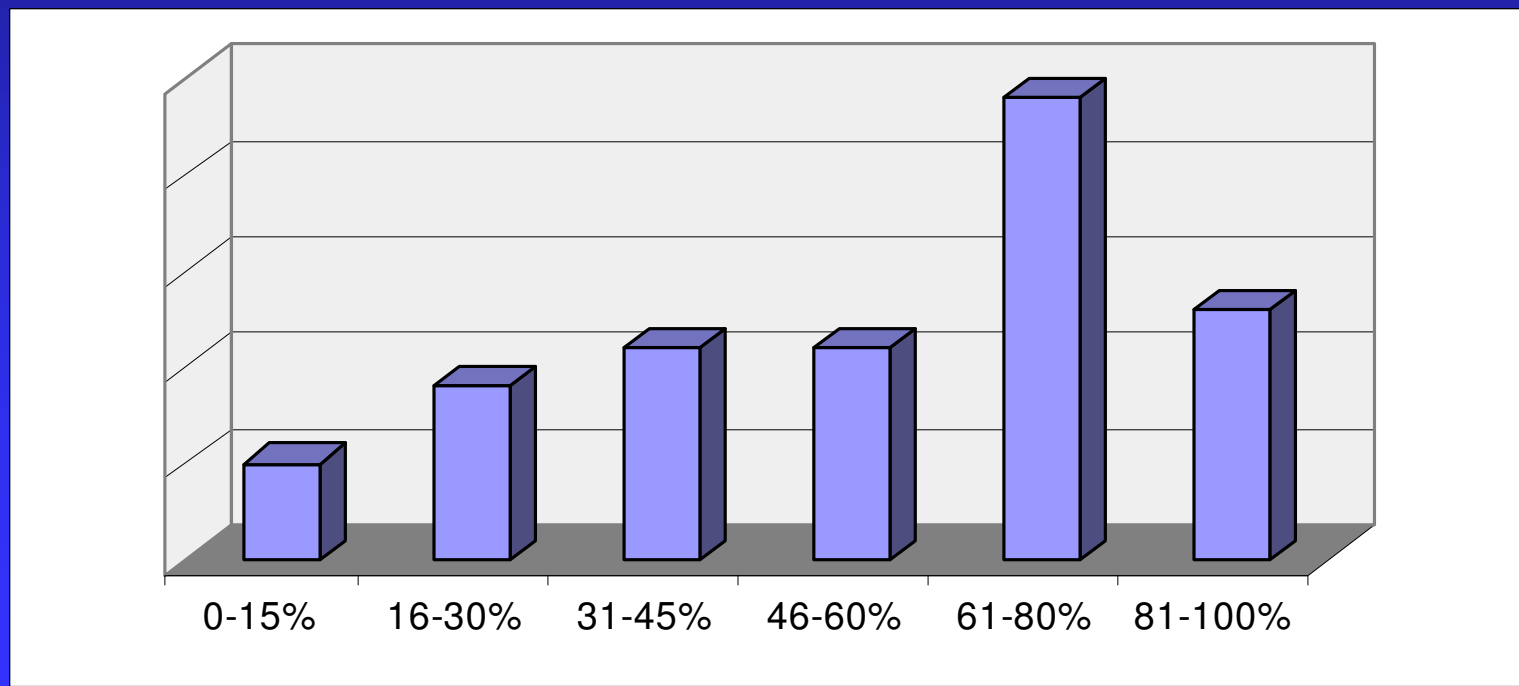
- 6. What is your percentage of usage for each parts category?



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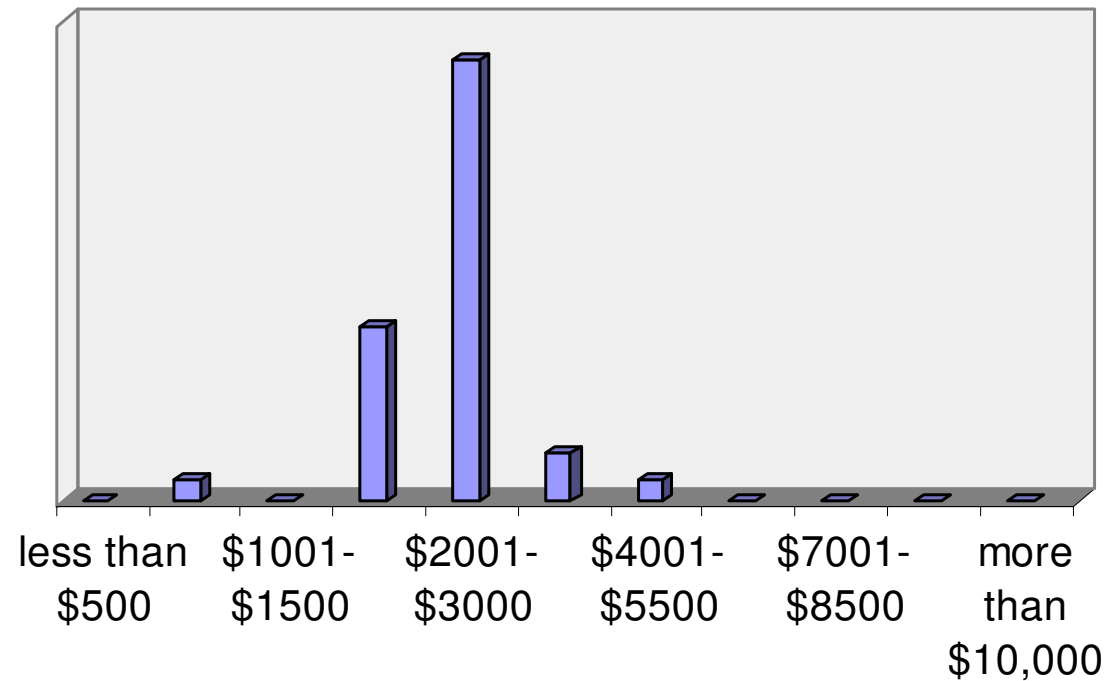
- 7. What is the average percentage of repair orders that you have produced a supplement for?



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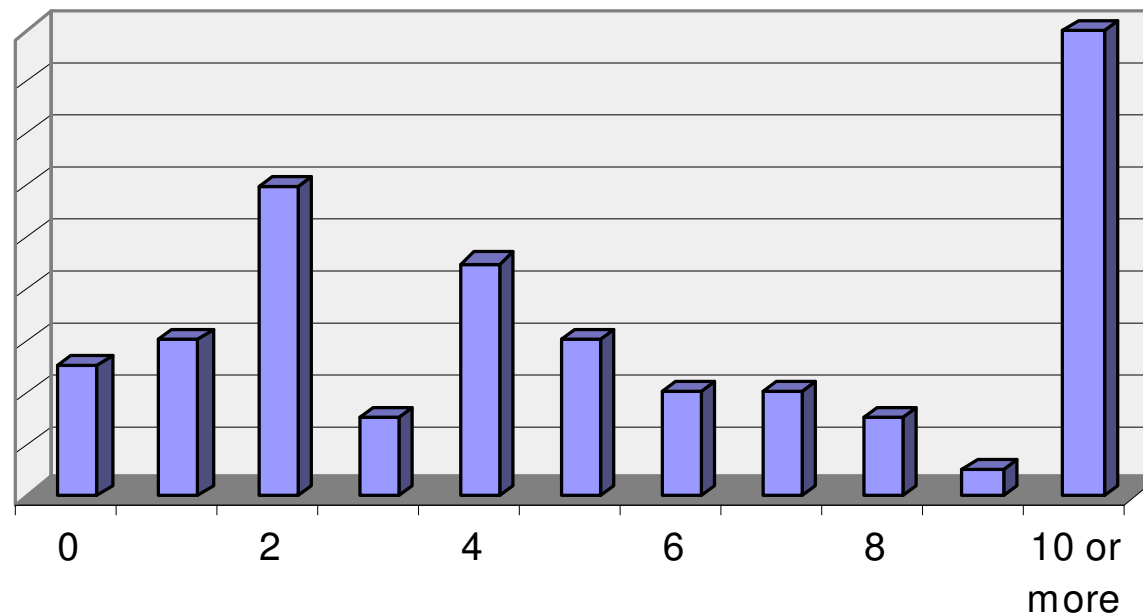
- 8. What is your average repair order dollar amount?



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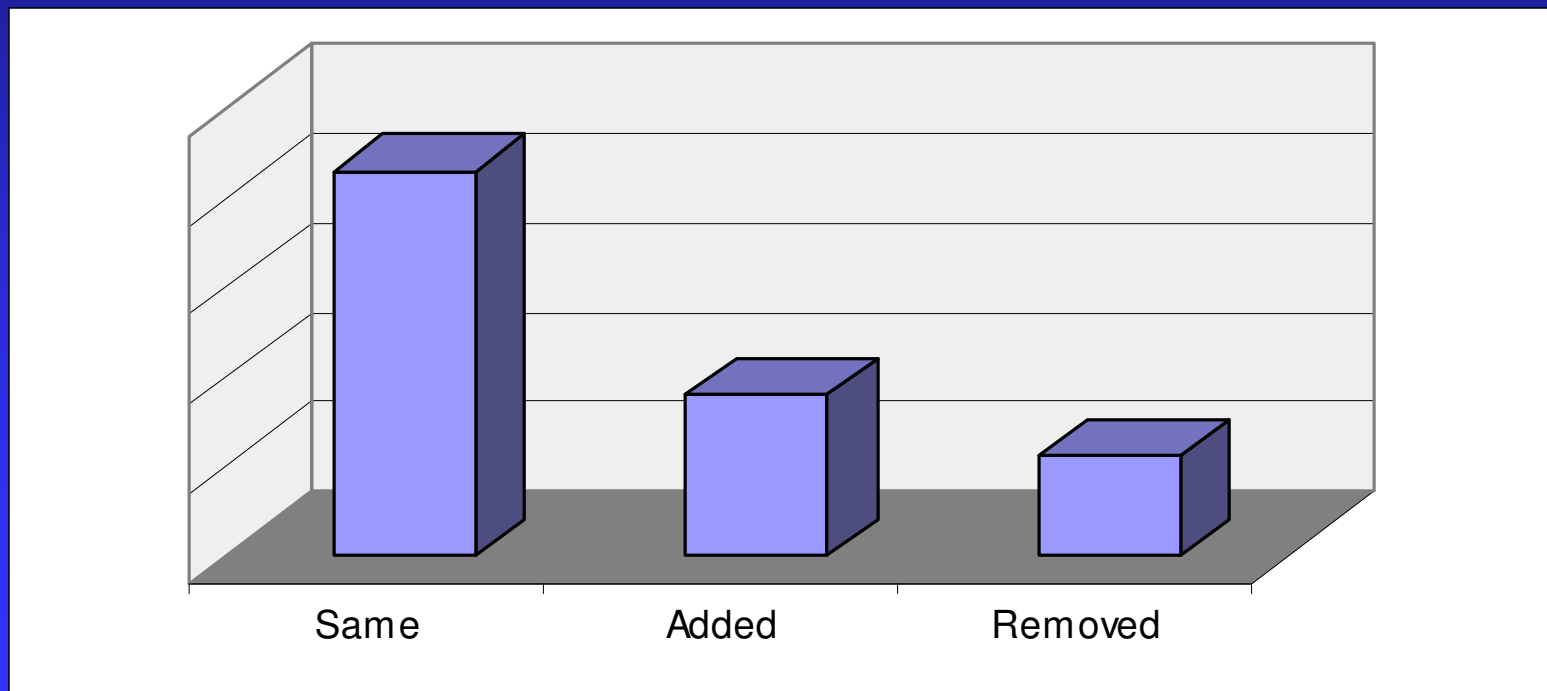
- 9. What is the number of direct repair programs you currently participate in?



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

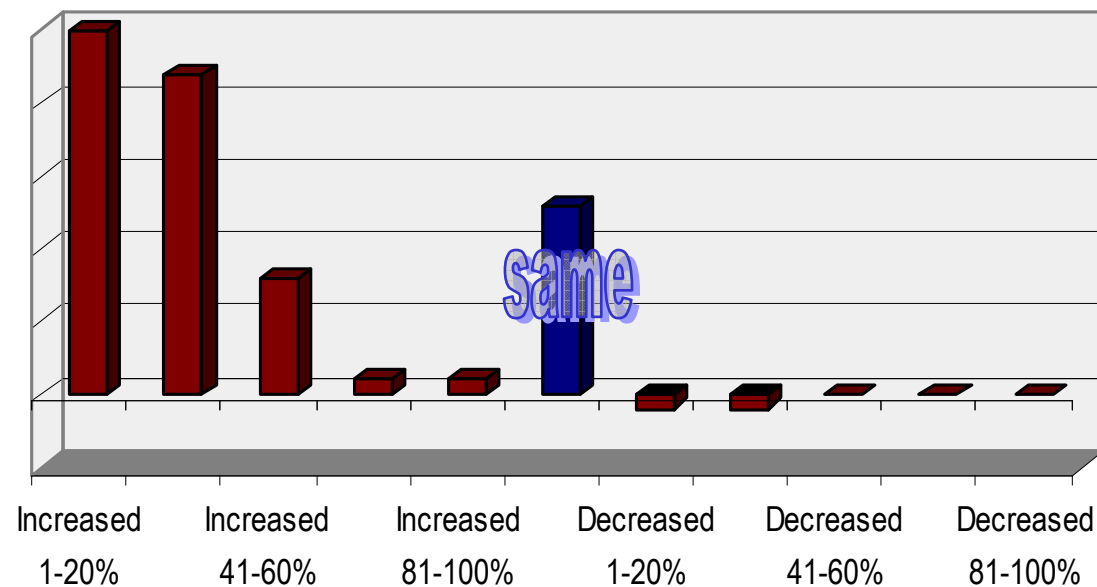


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- 11. Has there been an increase or decrease in total losses you have processed in your shop?

You may use the following answers to indicate a value, or same. The percentage of increase or decrease should be relative to 4th quarter 2008.



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- To come ...
 - ◆ Another survey is in the committee discussions for other industry segments
 - ◆ Comparable data will be asked for from other industry sources.
 - ◆ This same survey will be repeated for the January meeting, with comparable data.