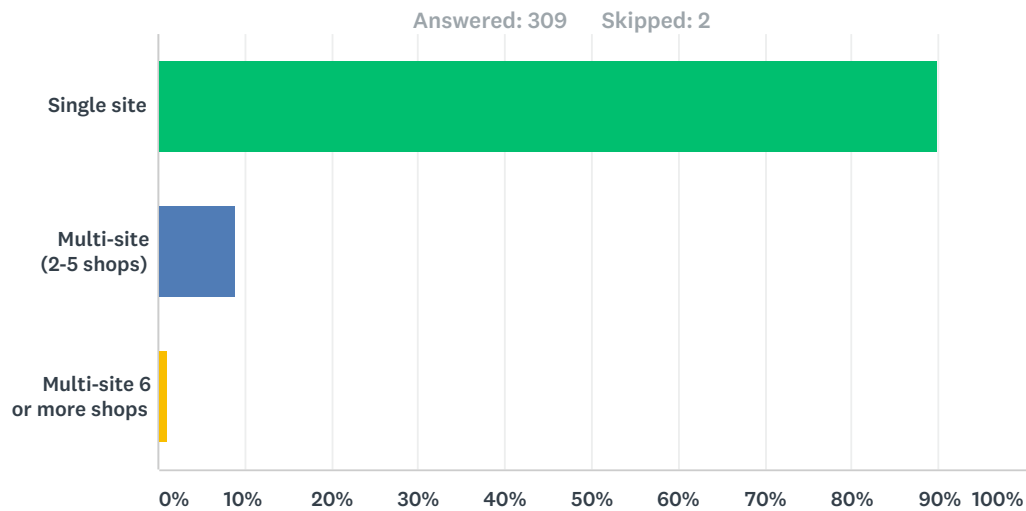
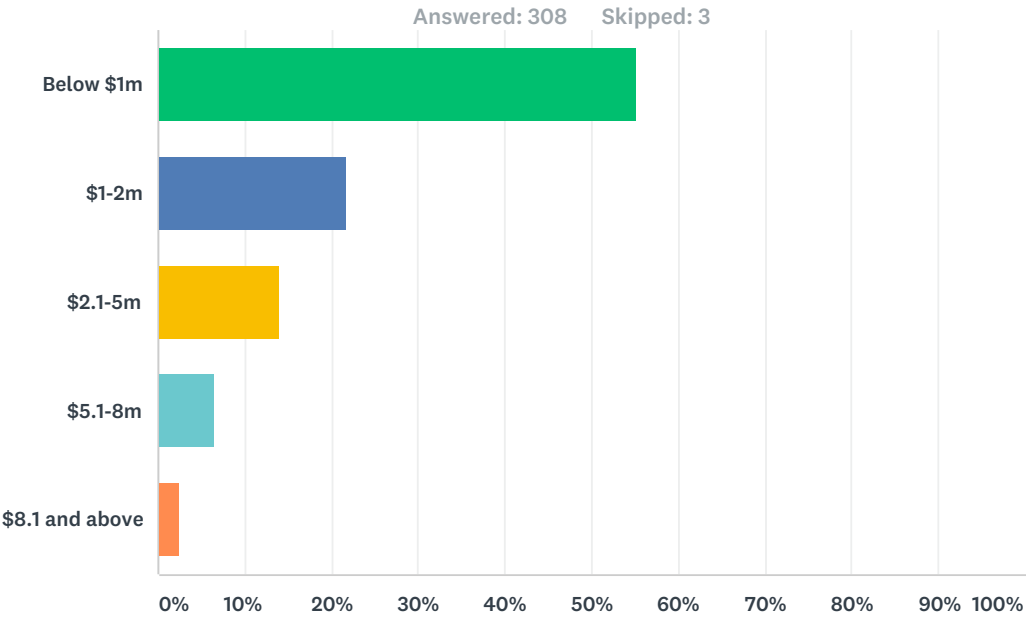


Q1 Your shop is...



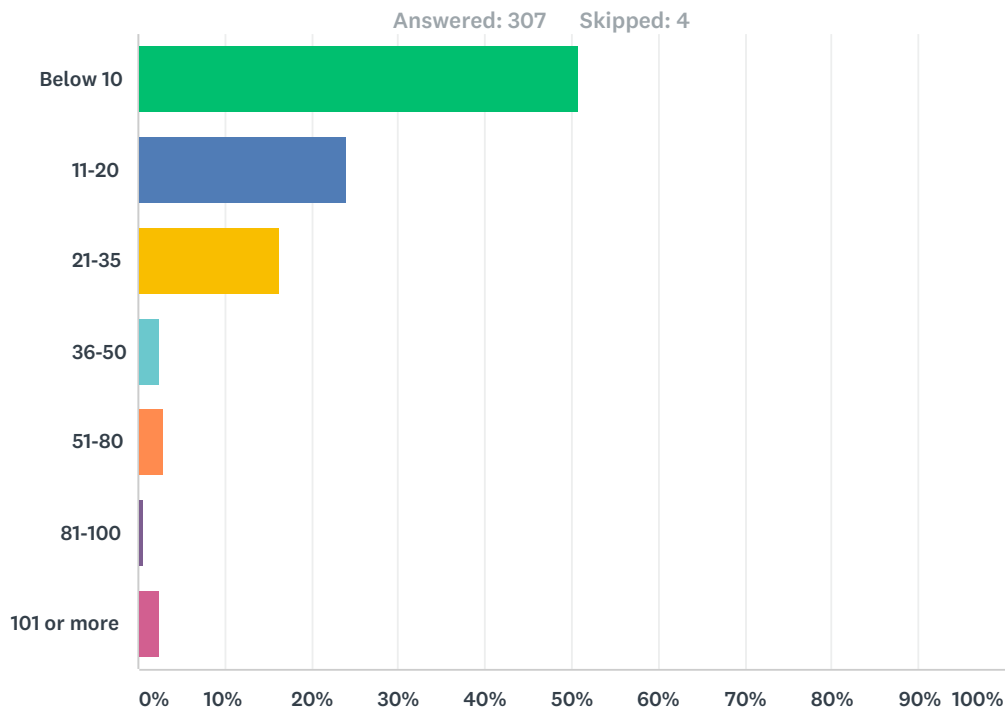
Answer Choices	Responses	
Single site	89.97%	278
Multi-site (2-5 shops)	9.06%	28
Multi-site 6 or more shops	0.97%	3
Total		309

Q2 Your annual turnover is...



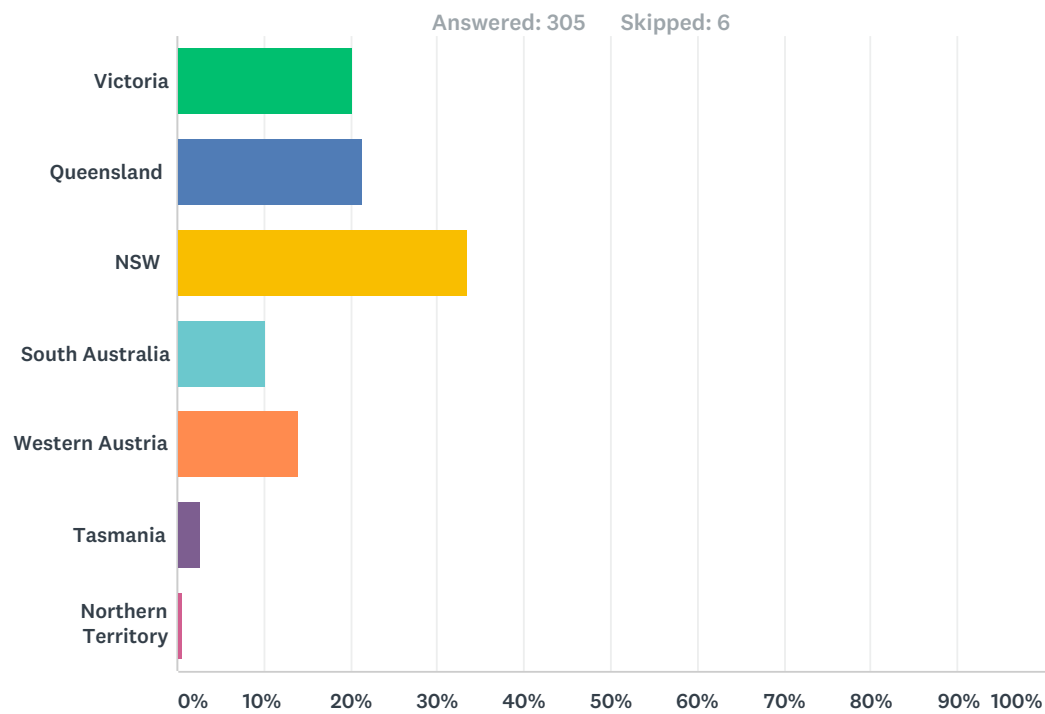
Answer Choices	Responses	
Below \$1m	55.19%	170
\$1-2m	21.75%	67
\$2.1-5m	13.96%	43
\$5.1-8m	6.49%	20
\$8.1 and above	2.60%	8
Total		308

Q3 Number of cars repaired per week on average



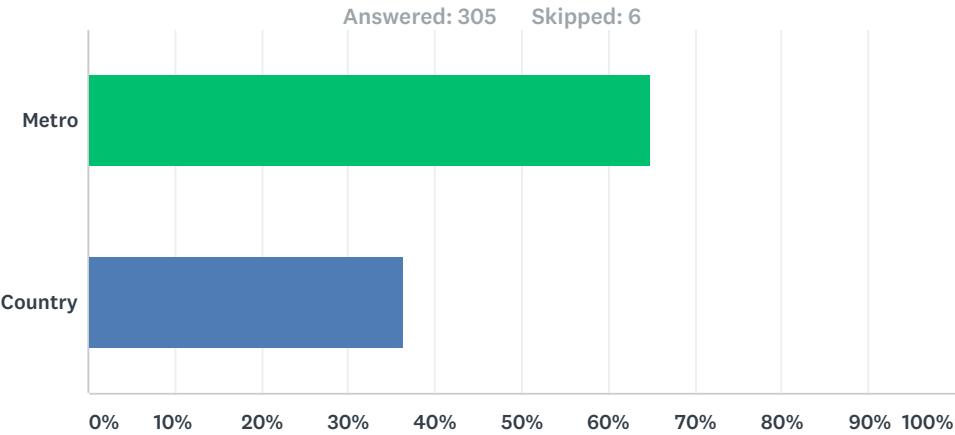
Answer Choices	Responses
Below 10	50.81% 156
11-20	24.10% 74
21-35	16.29% 50
36-50	2.61% 8
51-80	2.93% 9
81-100	0.65% 2
101 or more	2.61% 8
Total	307

Q4 Which state/Territory is your shop in?



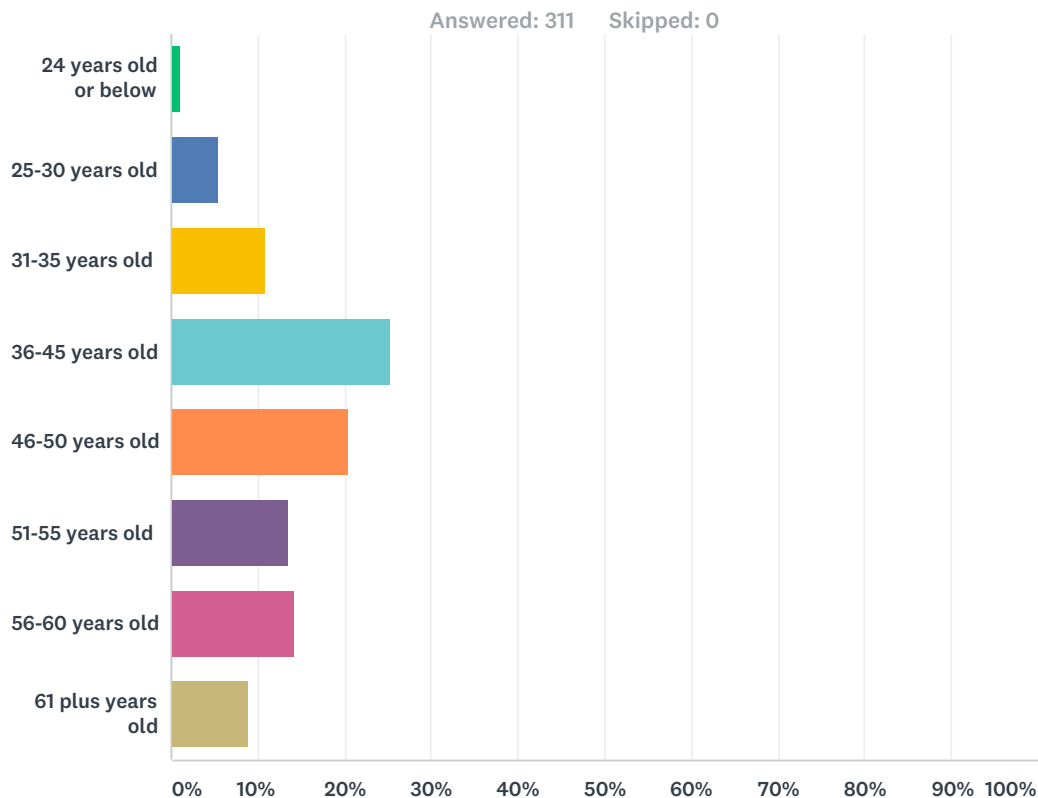
Answer Choices	Responses	
Victoria	20.33%	62
Queensland	21.31%	65
NSW	33.44%	102
South Australia	10.16%	31
Western Austria	14.10%	43
Tasmania	2.62%	8
Northern Territory	0.66%	2
Total Respondents: 305		

Q5 Are you a rural or city repairer



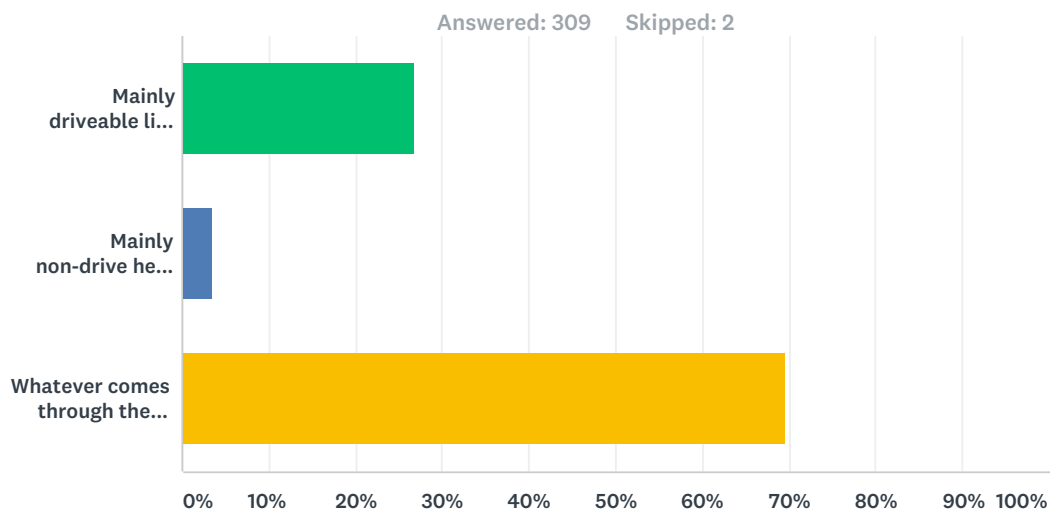
Answer Choices	Responses	
Metro	64.92%	198
Country	36.39%	111
Total Respondents: 305		

Q6 How old are you?



Answer Choices	Responses	
24 years old or below	0.96%	3
25-30 years old	5.47%	17
31-35 years old	10.93%	34
36-45 years old	25.40%	79
46-50 years old	20.58%	64
51-55 years old	13.50%	42
56-60 years old	14.15%	44
61 plus years old	9.00%	28
Total		311

Q7 What sort of work do you do?

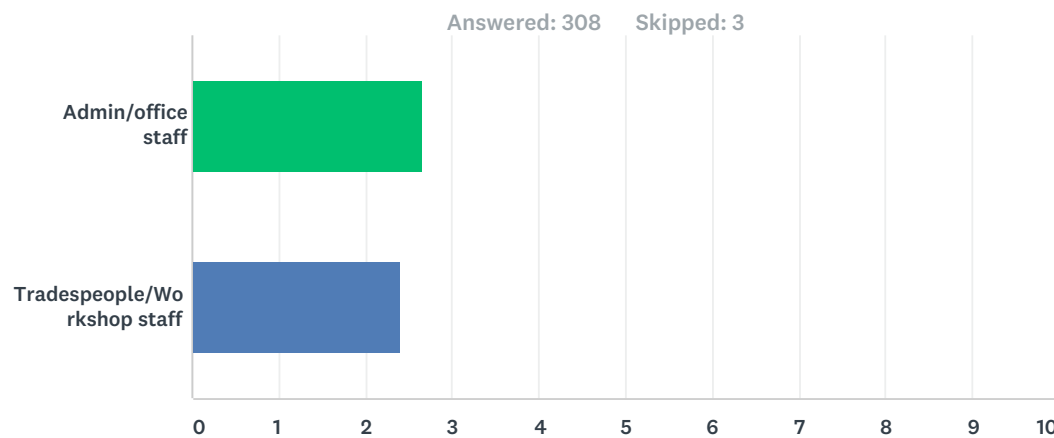


Answer Choices	Responses	
Mainly driveable light repairs	26.86%	83
Mainly non-drive heavy repairs	3.56%	11
Whatever comes through the door	69.58%	215
Total		309

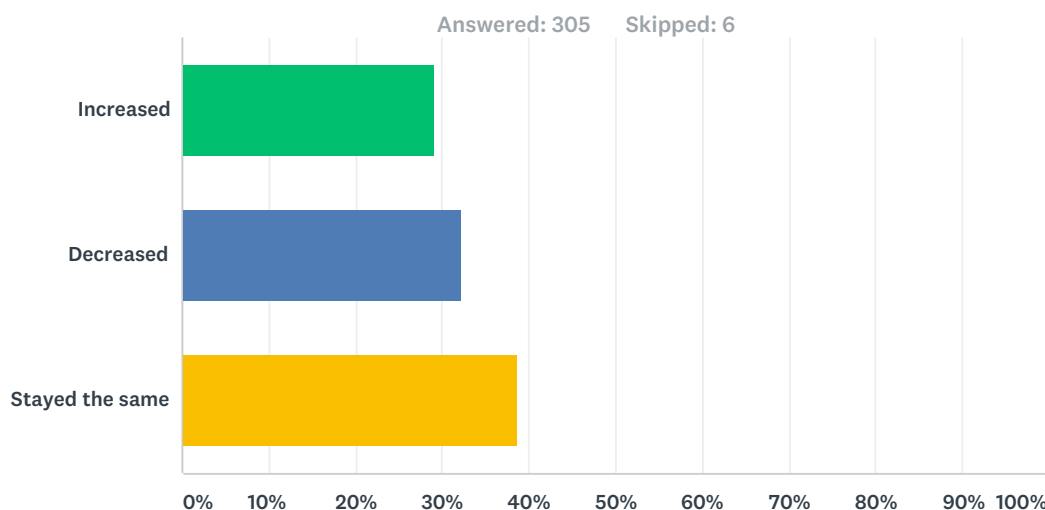
Q8 Total number of staff?

Answered: 303 Skipped: 8

Q9 In the past 12 months has the total number of employees in your business increased, decreased or stayed about the same?

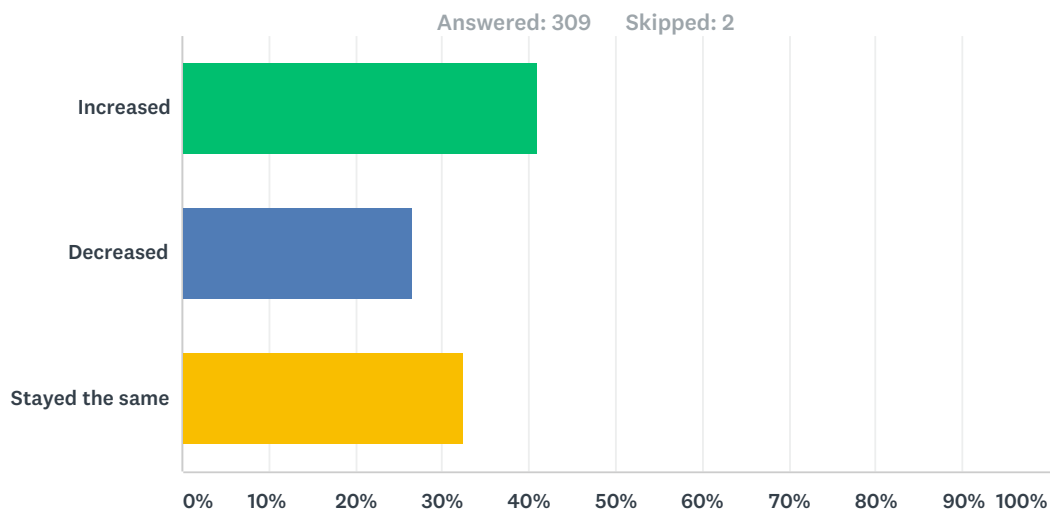


Q10 Over the past 12 months have the pre-tax profits from your business increased, decreased or stayed about the same comparing them with the previous year?



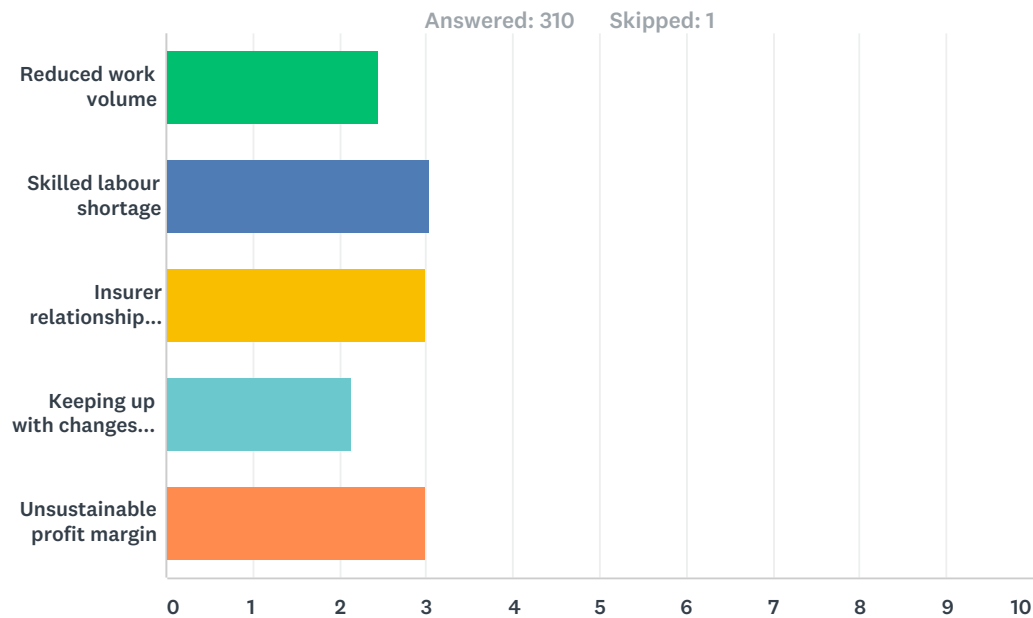
Answer Choices	Responses	
Increased	29.18%	89
Decreased	32.13%	98
Stayed the same	38.69%	118
Total		305

Q11 Over the past 12 months what about your work volume?



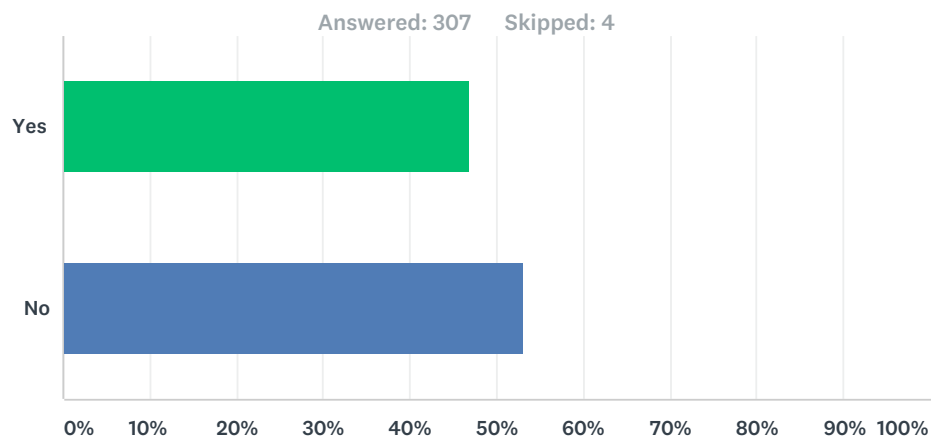
Answer Choices	Responses	
Increased	41.10%	127
Decreased	26.54%	82
Stayed the same	32.36%	100
Total		309

Q12 What do you see as the biggest threats to your business in the next 12 months?



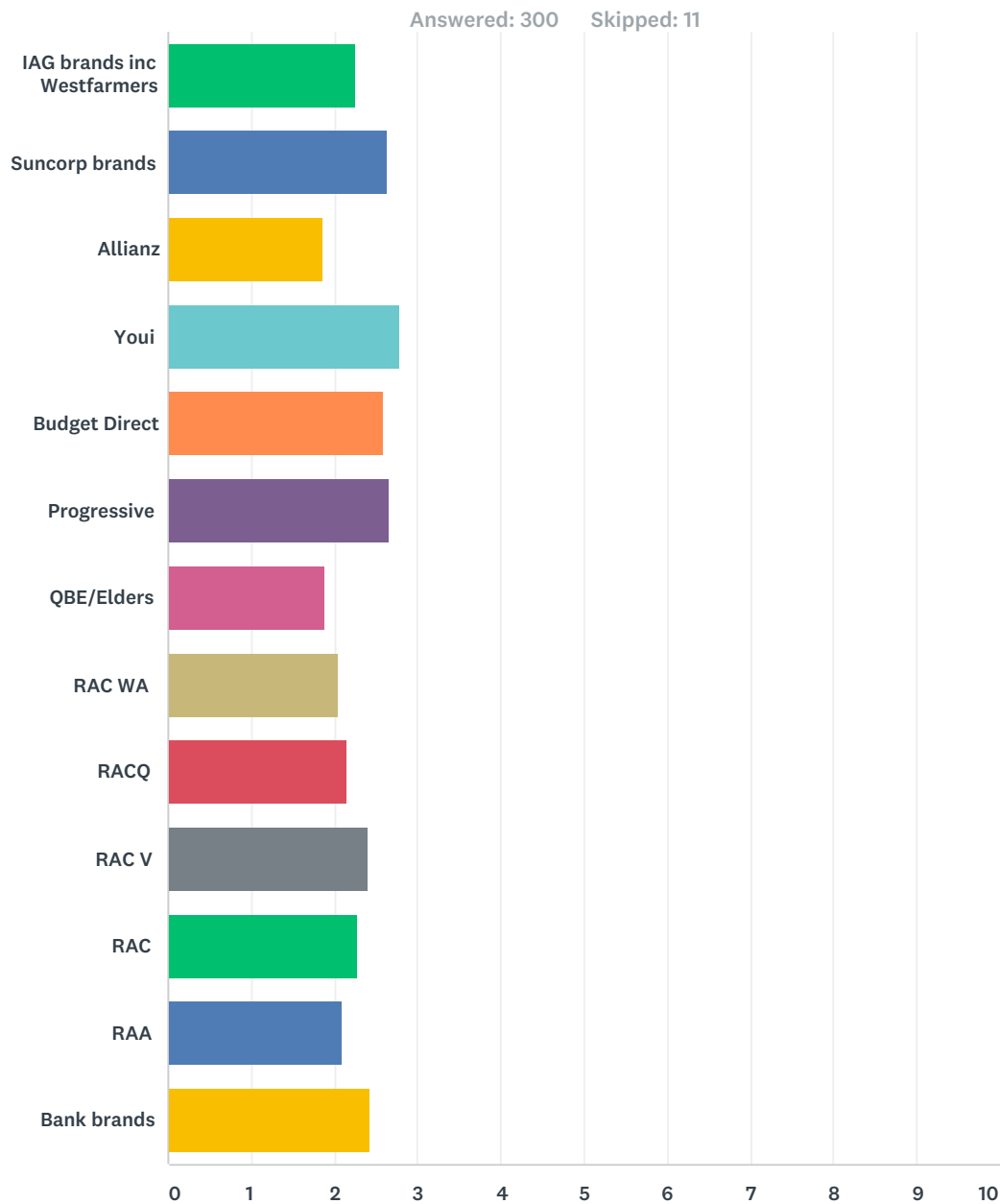
	Not an issue	A little concerned	Quite concerned	It's a real worry	Very concerned	Total	Weighted Average
Reduced work volume	27.40% 80	35.96% 105	14.73% 43	8.56% 25	13.36% 39	292	2.45
Skilled labour shortage	17.01% 50	23.47% 69	21.77% 64	13.95% 41	23.81% 70	294	3.04
Insurer relationship issues	16.33% 49	24.33% 73	24.00% 72	14.33% 43	21.00% 63	300	2.99
Keeping up with changes in vehicle technology - equipment and training	31.29% 92	39.46% 116	17.69% 52	6.80% 20	4.76% 14	294	2.14
Unsustainable profit margin	12.59% 37	33.33% 98	18.03% 53	14.97% 44	21.09% 62	294	2.99

Q13 Are you a member of the MTA?



Answer Choices	Responses	
Yes	46.91%	144
No	53.09%	163
Total		307

Q14 Please rate the insurers below for claims operating system ease of use (leave blank if you do not work for these brands)



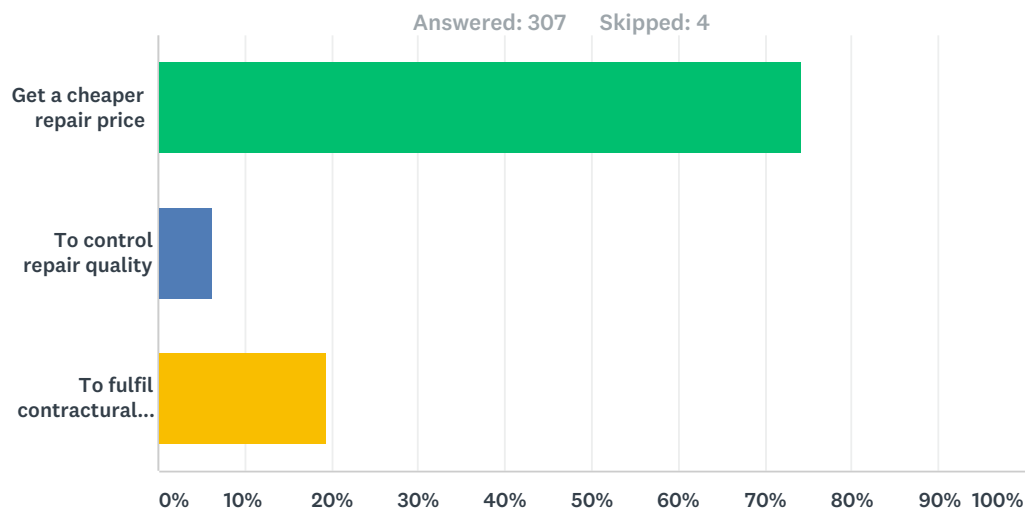
	Super simple	Acceptable	A bit of a fiddle	Complicated and time consuming	Total	Weighted Average
IAG brands inc Westfarmers	17.96% 51	54.23% 154	12.32% 35	15.49% 44	284	2.25
Suncorp brands	11.97% 34	41.20% 117	17.61% 50	29.23% 83	284	2.64
Allianz	35.27% 103	48.29% 141	11.99% 35	4.45% 13	292	1.86
Youi	11.02% 28	31.10% 79	25.59% 65	32.28% 82	254	2.79

Budget Direct	10.66% 26	38.93% 95	30.33% 74	20.08% 49	244	2.60
Progressive	10.96% 16	39.73% 58	22.60% 33	26.71% 39	146	2.65
QBE/Elders	31.14% 85	53.48% 146	10.26% 28	5.13% 14	273	1.89
RAC WA	33.70% 31	41.30% 38	10.87% 10	14.13% 13	92	2.05
RACQ	21.37% 25	52.99% 62	15.38% 18	10.26% 12	117	2.15
RAC V	12.15% 13	51.40% 55	20.56% 22	15.89% 17	107	2.40
RAC	17.39% 12	53.62% 37	13.04% 9	15.94% 11	69	2.28
RAA	32.18% 28	41.38% 36	11.49% 10	14.94% 13	87	2.09
Bank brands	9.50% 19	51.00% 102	27.00% 54	12.50% 25	200	2.42

Q15 What is the major issue you have dealing with insurers? (just one please)

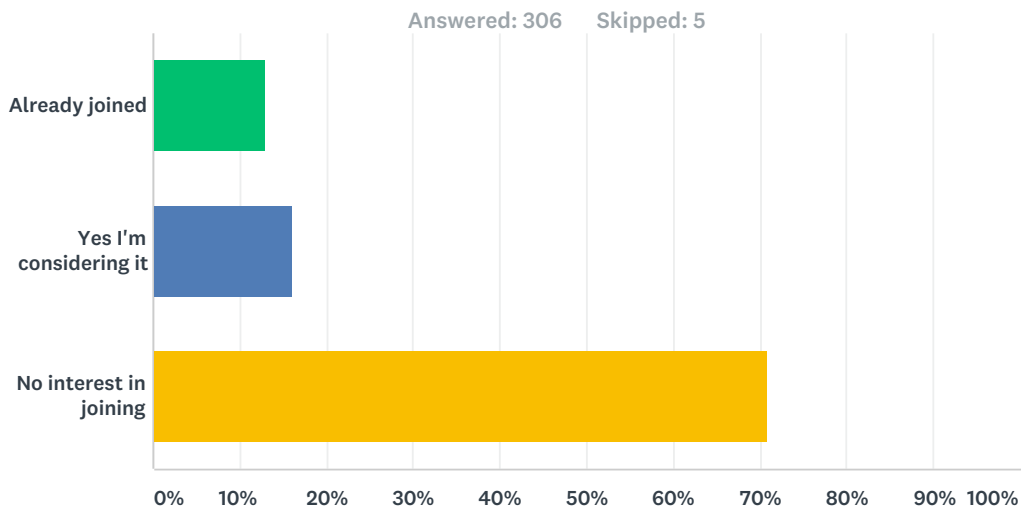
Answered: 279 Skipped: 32

Q16 Do you believe insurers heavily encourage policyholders to use their approved repairers in order to:



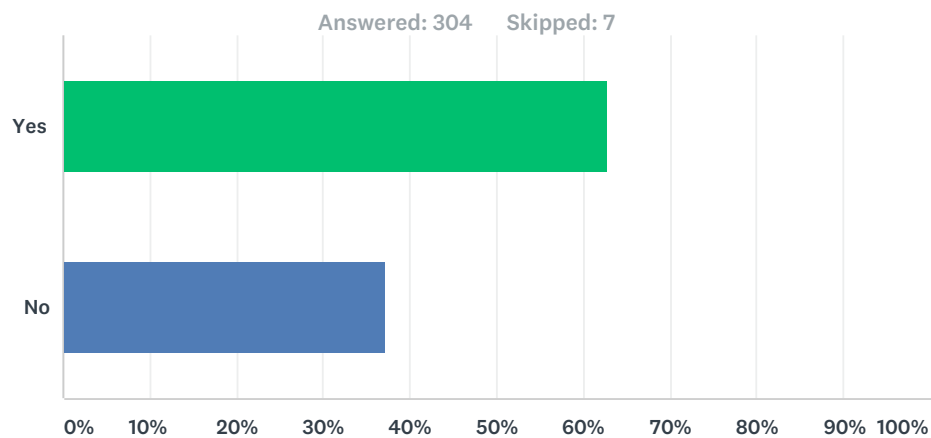
Answer Choices	Responses	
Get a cheaper repair price	74.27%	228
To control repair quality	6.19%	19
To fulfil contractual obligations	19.54%	60
Total		307

Q17 Are you considering joining a group/franchise such as Car Craft or Fix Auto in the next 12 months?



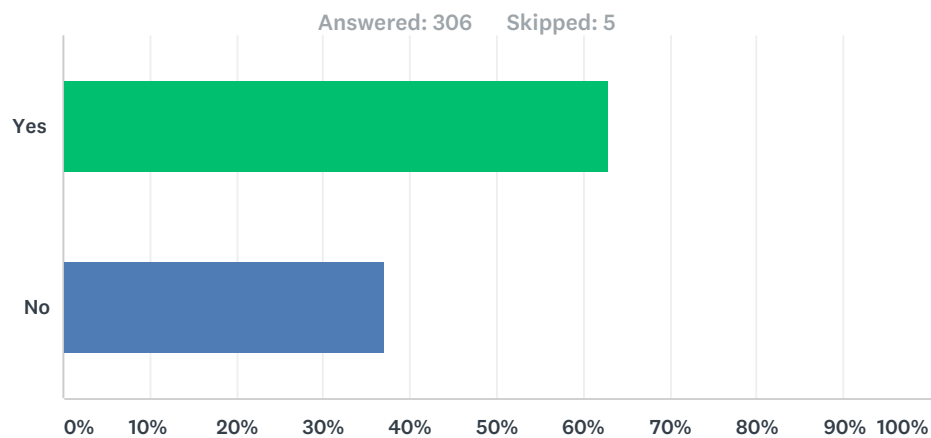
Answer Choices	Responses	
Already joined	13.07%	40
Yes I'm considering it	16.01%	49
No interest in joining	70.92%	217
Total		306

Q18 Are you confident that your business will remain profitable for the next five years?



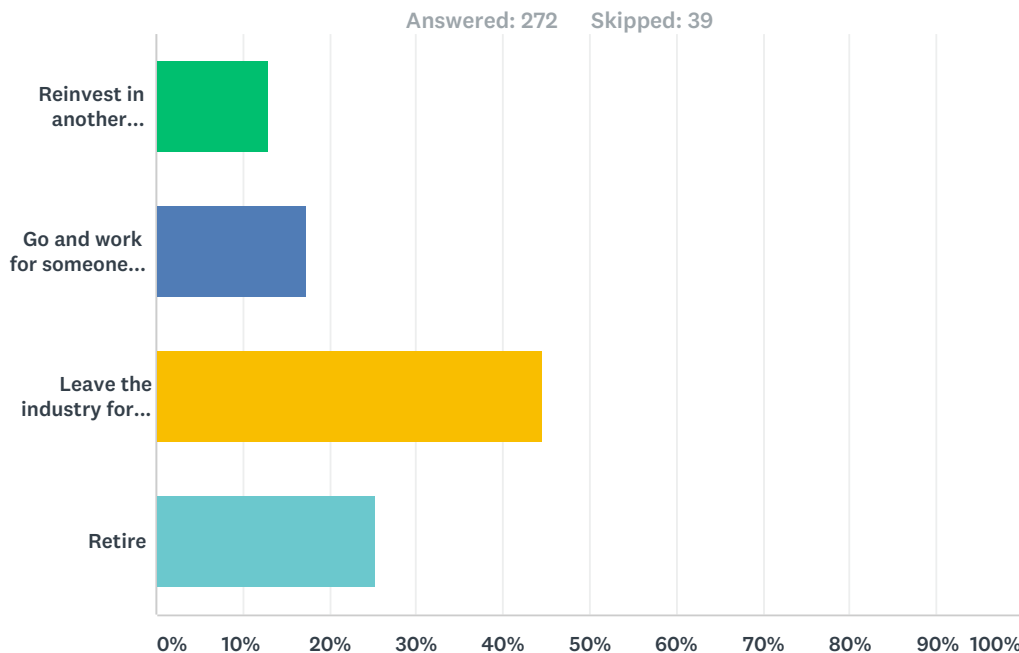
Answer Choices	Responses	
Yes	62.83%	191
No	37.17%	113
Total		304

Q19 If you had a good offer to sell your business in the next 12 months would you take it?



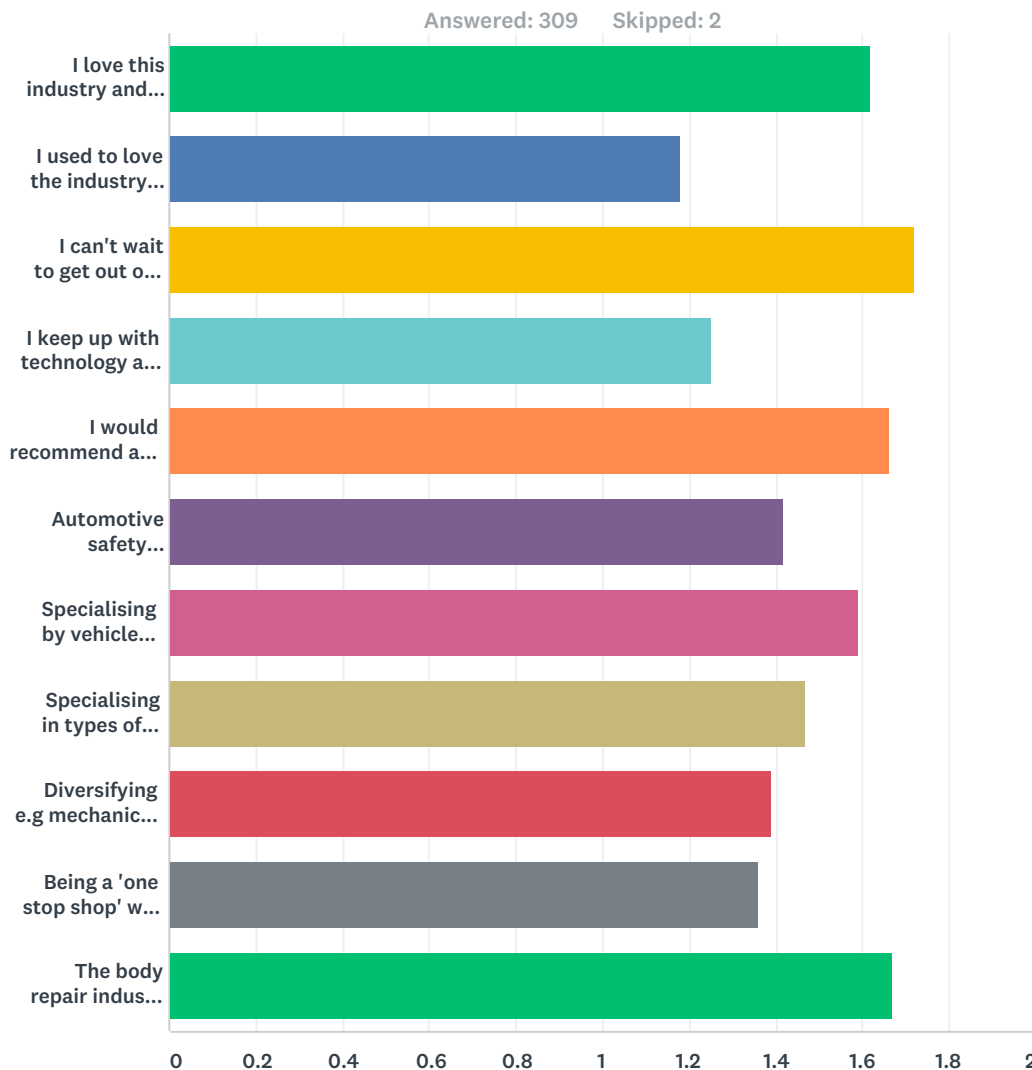
Answer Choices	Responses	
Yes	63.07%	193
No	36.93%	113
Total		306

Q20 If you did sell your business would you



Answer Choices	Responses	
Reinvest in another autobody repair business?	12.87%	35
Go and work for someone else within the industry?	17.28%	47
Leave the industry for another profession?	44.49%	121
Retire	25.37%	69
Total		272

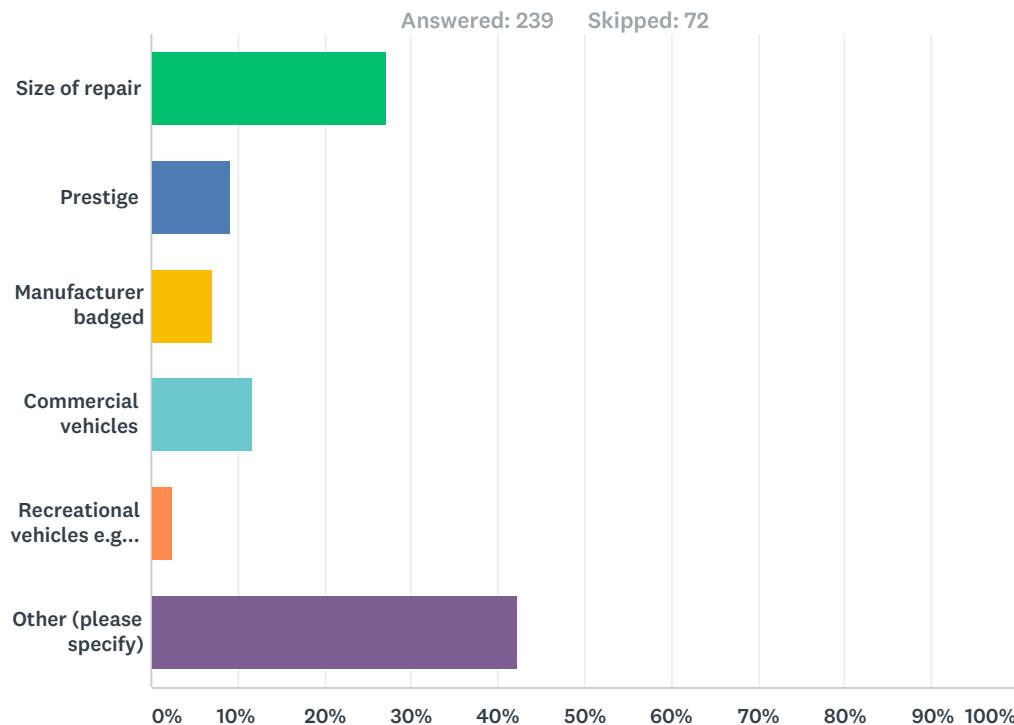
Q21 Please read the following statements about the industry and say if you agree with them.



	Agree	Disagree	Total	Weighted Average
I love this industry and am excited about the future	37.58% 112	62.42% 186	298	1.62
I used to love the industry but it is getting to hard to make a profit	81.73% 246	18.27% 55	301	1.18
I can't wait to get out of the industry	27.70% 82	72.30% 214	296	1.72
I keep up with technology and undertake training/get my staff to undertake training to ensure my shop uses the latest repair methods	74.92% 224	25.08% 75	299	1.25
I would recommend a career in the body repair industry to my children and to the younger generation in general	33.66% 103	66.34% 203	306	1.66
Automotive safety technology will mean far fewer accidents and much less volume in five years time	57.89% 176	42.11% 128	304	1.42
Specialising by vehicle groups eg prestige, Japanese, European etc will be the way to thrive in the future	41.28% 123	58.72% 175	298	1.59

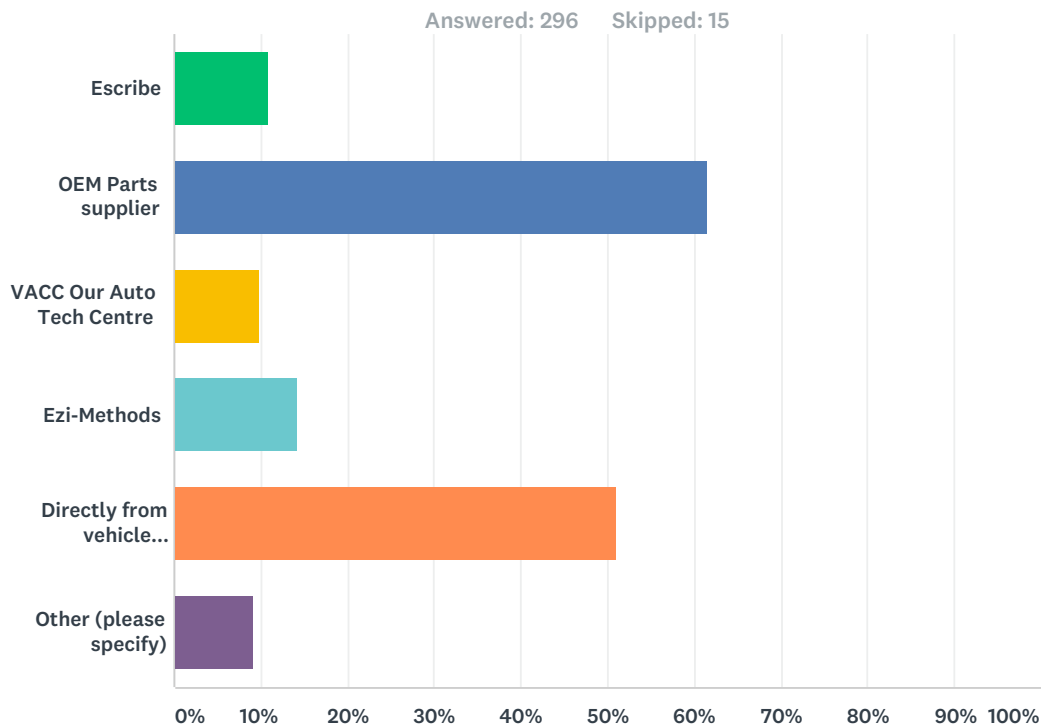
Specialising in types of repair such as heavy or light will be the way to thrive in the future	53.31% 161	46.69% 141	302	1.47
Diversifying e.g mechanical repair, trucks, boats, caravans will be the way to thrive in the future	60.93% 184	39.07% 118	302	1.39
Being a 'one stop shop' will be the way to thrive in the future	64.00% 192	36.00% 108	300	1.36
The body repair industry as we currently know it (eg paint and panel shops only) will not exist in 10 years time	32.78% 98	67.22% 201	299	1.67

Q22 Does your business specialise in some way



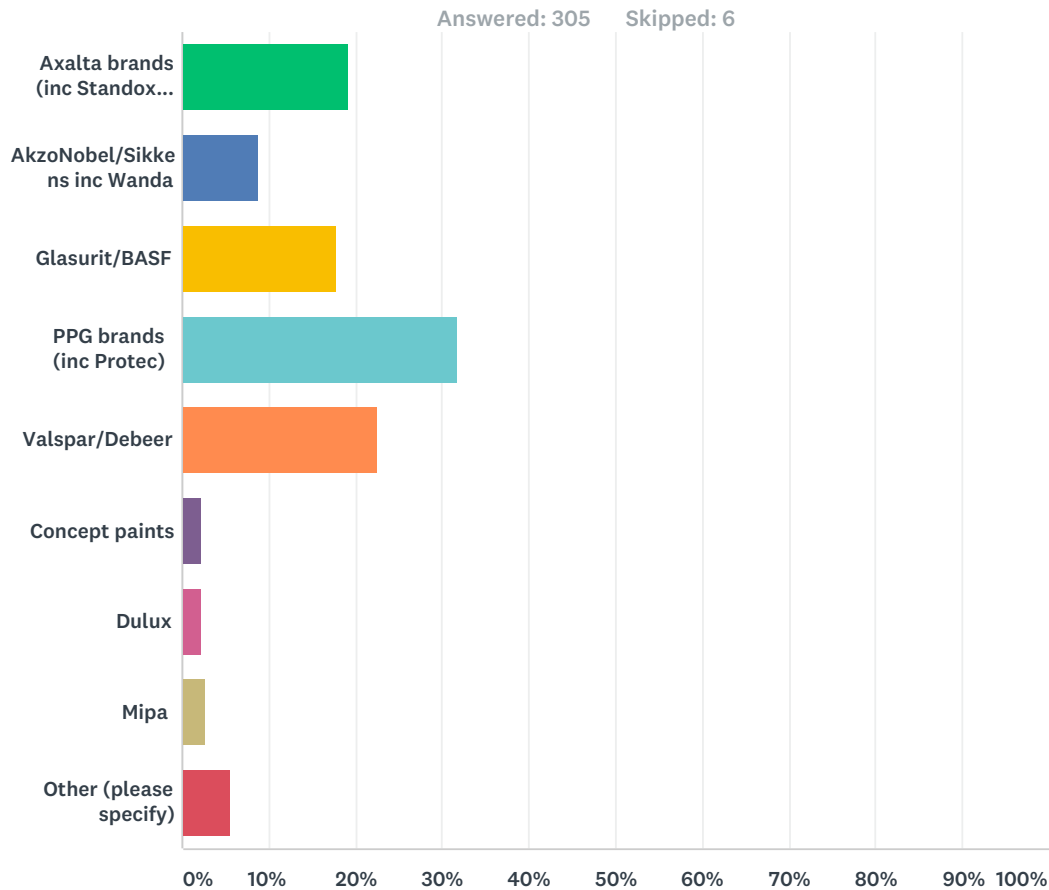
Answer Choices	Responses	
Size of repair	27.20%	65
Prestige	9.21%	22
Manufacturer badged	7.11%	17
Commercial vehicles	11.72%	28
Recreational vehicles e.g. boats and caravans	2.51%	6
Other (please specify)	42.26%	101
Total		239

Q23 Where do you source your repair information from?



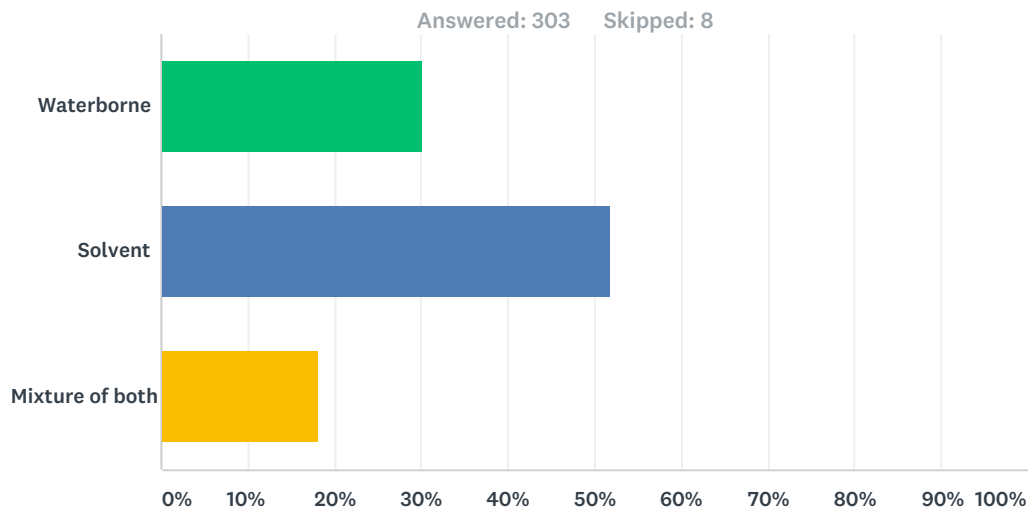
Answer Choices	Responses	
Escribe	10.81%	32
OEM Parts supplier	61.49%	182
VACC Our Auto Tech Centre	9.80%	29
Ezi-Methods	14.19%	42
Directly from vehicle manufacturer	51.01%	151
Other (please specify)	9.12%	27
Total Respondents: 296		

Q24 Which paint does your shop use?



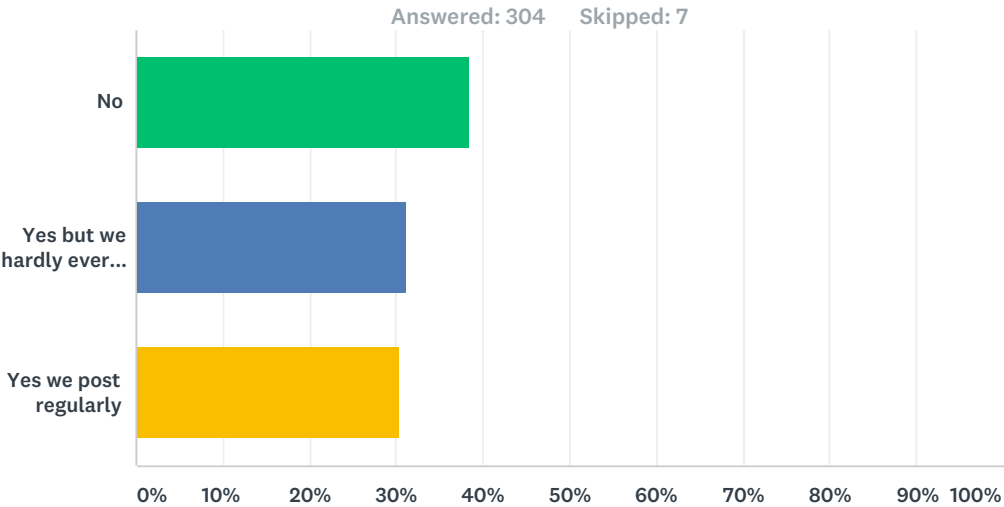
Answer Choices	Responses	
Axalta brands (inc Standox, Cromax, Spies Hecker, Syrox, Permahyde, Imron)	19.34%	59
AkzoNobel/Sikkens inc Wanda	8.85%	27
Glasurit/BASF	17.70%	54
PPG brands (inc Protec)	31.80%	97
Valspar/Debeer	22.62%	69
Concept paints	2.30%	7
Dulux	2.30%	7
Mipa	2.62%	8
Other (please specify)	5.57%	17
Total Respondents: 305		

Q25 Does your shop use solvent or waterborne paint?



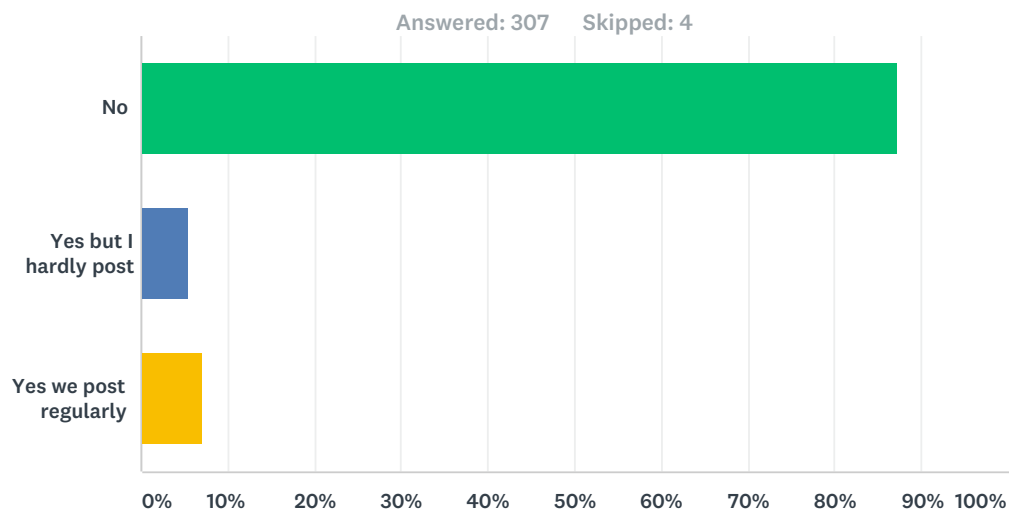
Answer Choices	Responses	
Waterborne	30.03%	91
Solvent	51.82%	157
Mixture of both	18.15%	55
Total		303

Q26 Do you have a Facebook page?



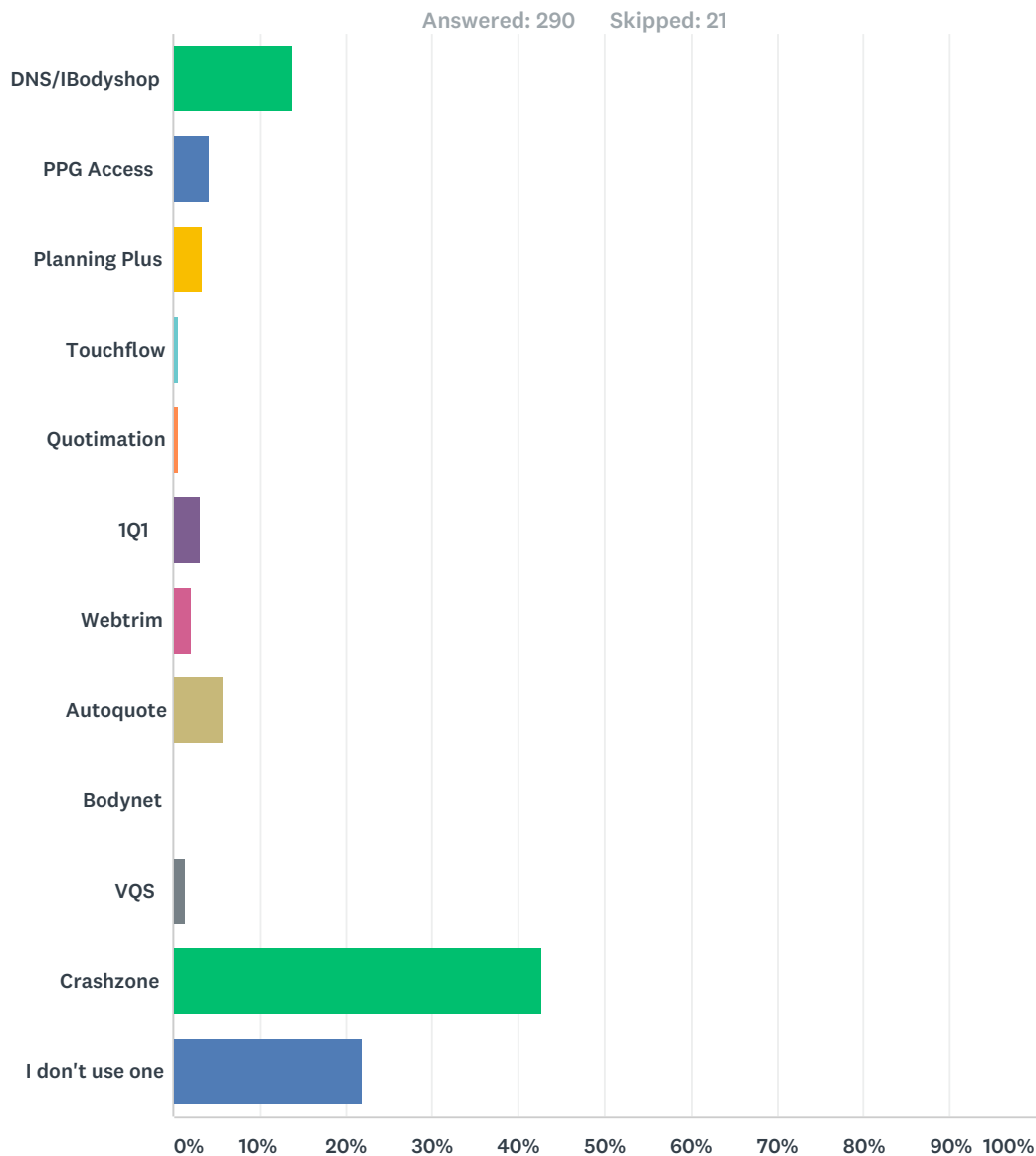
Answer Choices	Responses	
No	38.49%	117
Yes but we hardly ever post	31.25%	95
Yes we post regularly	30.26%	92
Total		304

Q27 Is your business on Instagram?



Answer Choices	Responses	
No	87.30%	268
Yes but I hardly post	5.54%	17
Yes we post regularly	7.17%	22
Total		307

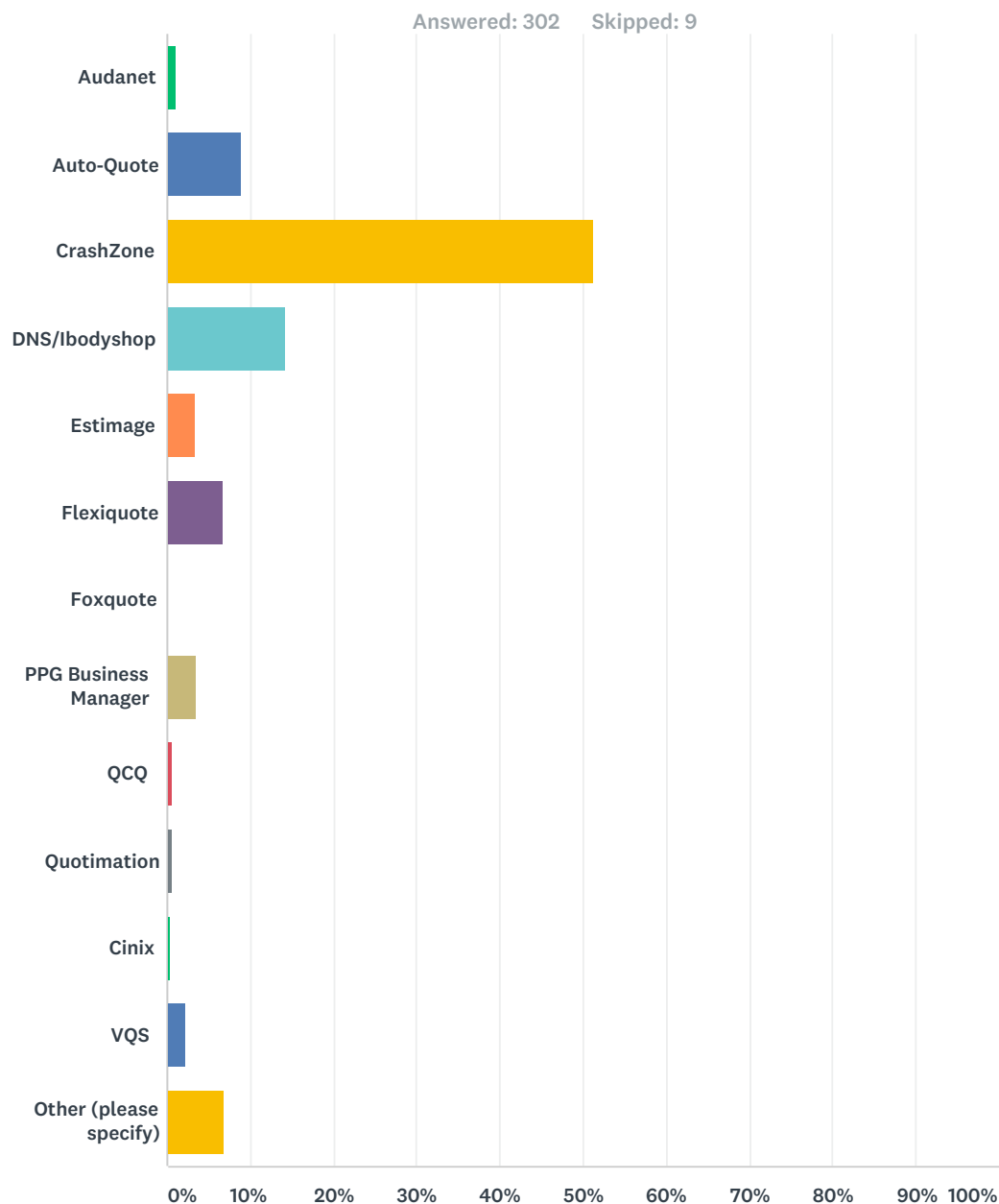
Q28 Which workshop management system do you use?



Answer Choices	Responses	
DNS/IBodyshop	13.79%	40
PPG Access	4.14%	12
Planning Plus	3.45%	10
Touchflow	0.69%	2
Quotimation	0.69%	2
1Q1	3.10%	9
Webtrim	2.07%	6
Autoquote	5.86%	17
Bodynet	0.00%	0

VQS	1.38%	4
Crashzone	42.76%	124
I don't use one	22.07%	64
Total		290

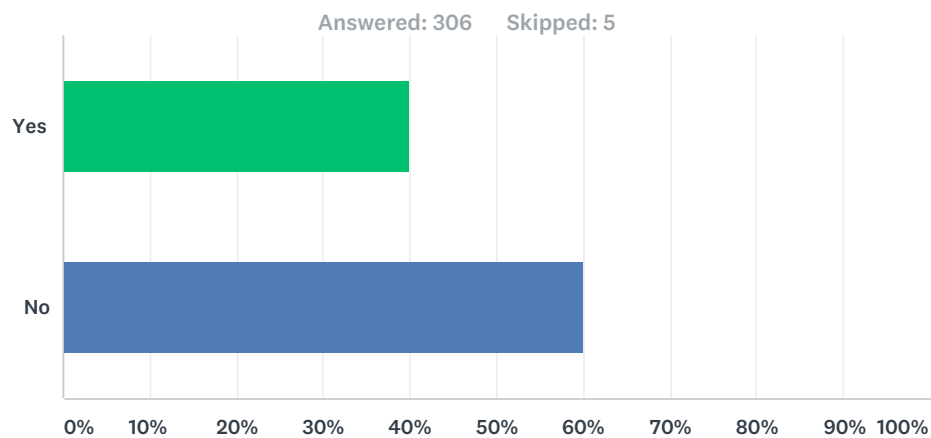
Q29 Which quoting package/s do you use? You can check more than one.



Answer Choices	Responses	
Audanet	0.99%	3
Auto-Quote	8.94%	27
CrashZone	51.32%	155
DNS/Ibodyshop	14.24%	43
Estimage	3.31%	10
Flexiquote	6.62%	20
Foxquote	0.00%	0

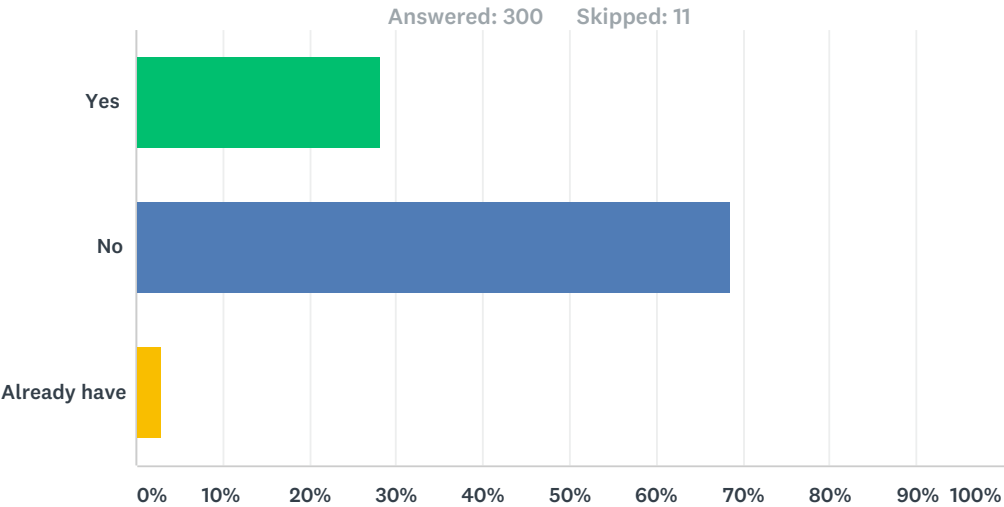
PPG Business Manager	3.64%	11
QCQ	0.66%	2
Quotimation	0.66%	2
Cinix	0.33%	1
VQS	2.32%	7
Other (please specify)	6.95%	21
Total		302

Q30 Do you have an exit plan or succession plan in place for your business?



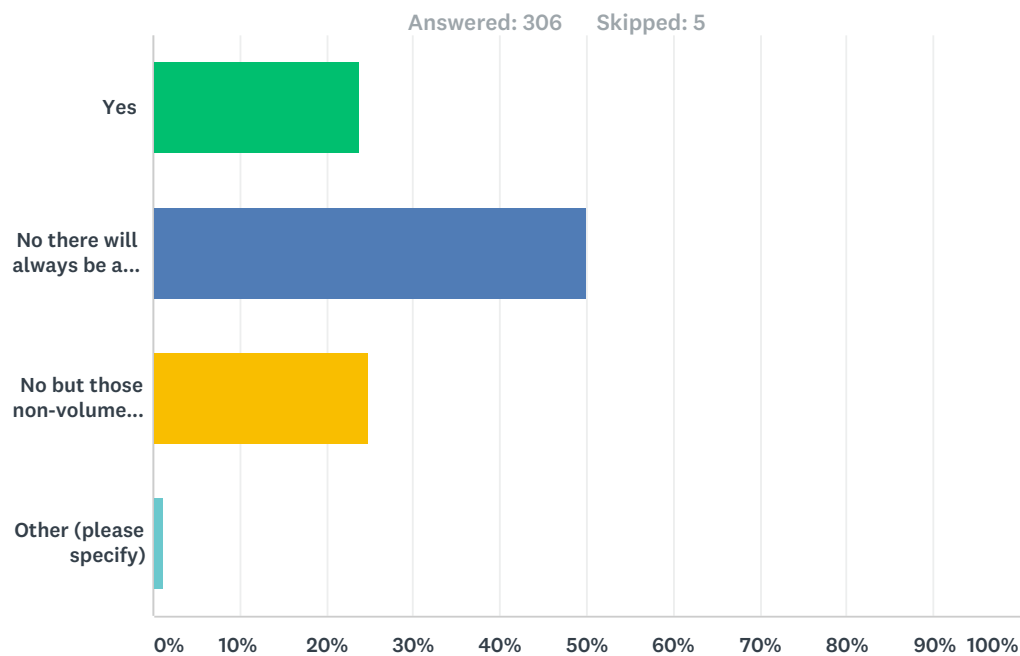
Answer Choices	Responses	
Yes	39.87%	122
No	60.13%	184
Total		306

Q31 Will you be taking part in the national shop grading program?



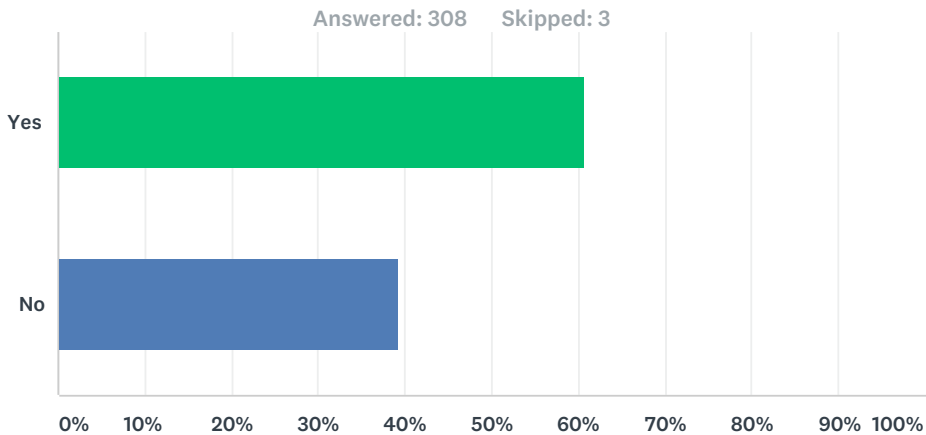
Answer Choices	Responses	
Yes	28.33%	85
No	68.67%	206
Already have	3.00%	9
Total		300

Q32 Given the rate of consolidation do you think think that only 'volume' shops will survive in the 10 years?



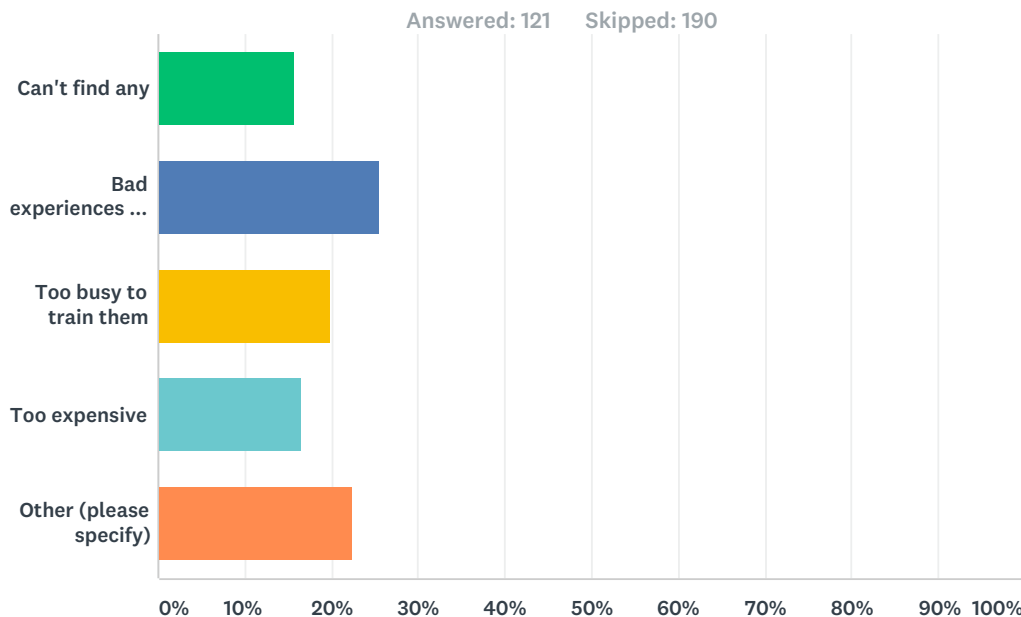
Answer Choices	Responses	
Yes	23.86%	73
No there will always be a need for independent repair shops	50.00%	153
No but those non-volume shops will have to specialise in some way to remain viable	24.84%	76
Other (please specify)	1.31%	4
Total		306

Q33 Does your shop employ apprentices?



Answer Choices	Responses	
Yes	60.71%	187
No	39.29%	121
Total		308

Q34 Why don't you employ apprentices?



Answer Choices	Responses	
Can't find any	15.70%	19
Bad experiences in the past	25.62%	31
Too busy to train them	19.83%	24
Too expensive	16.53%	20
Other (please specify)	22.31%	27
Total		121