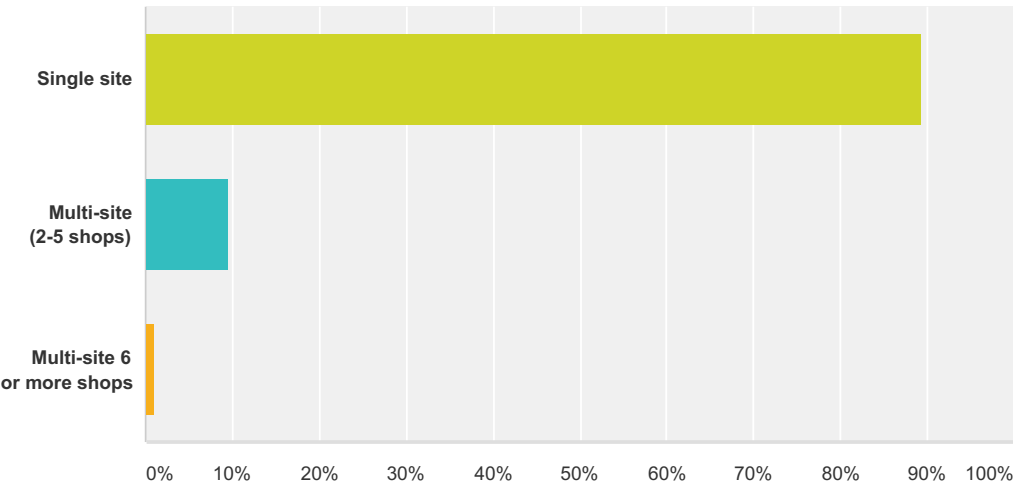


Q1 Your shop is...

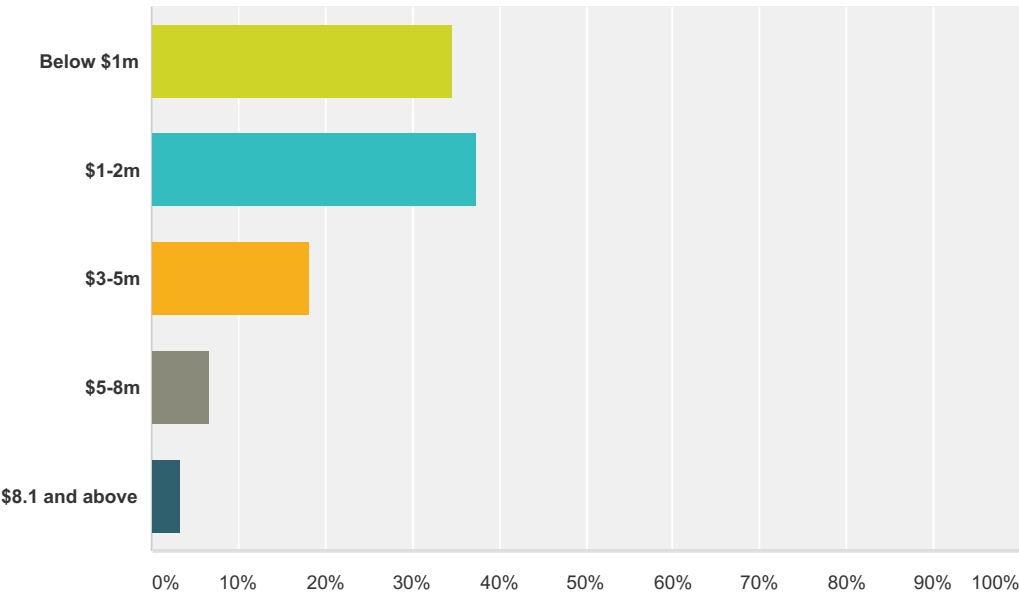
Answered: 271 Skipped: 6



Answer Choices	Responses	
Single site	89.30%	242
Multi-site (2-5 shops)	9.59%	26
Multi-site 6 or more shops	1.11%	3
Total		271

Q2 Your annual turnover is...

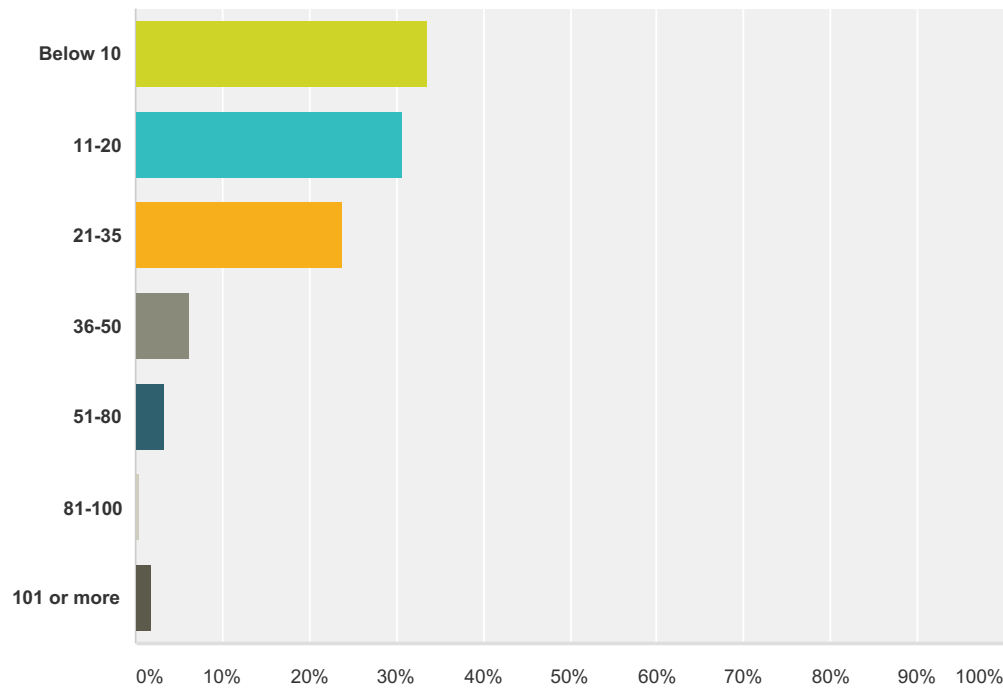
Answered: 271 Skipped: 6



Answer Choices	Responses	
Below \$1m	34.69%	94
\$1-2m	37.27%	101
\$3-5m	18.08%	49
\$5-8m	6.64%	18
\$8.1 and above	3.32%	9
Total		271

Q3 Number of cars repaired per week on average

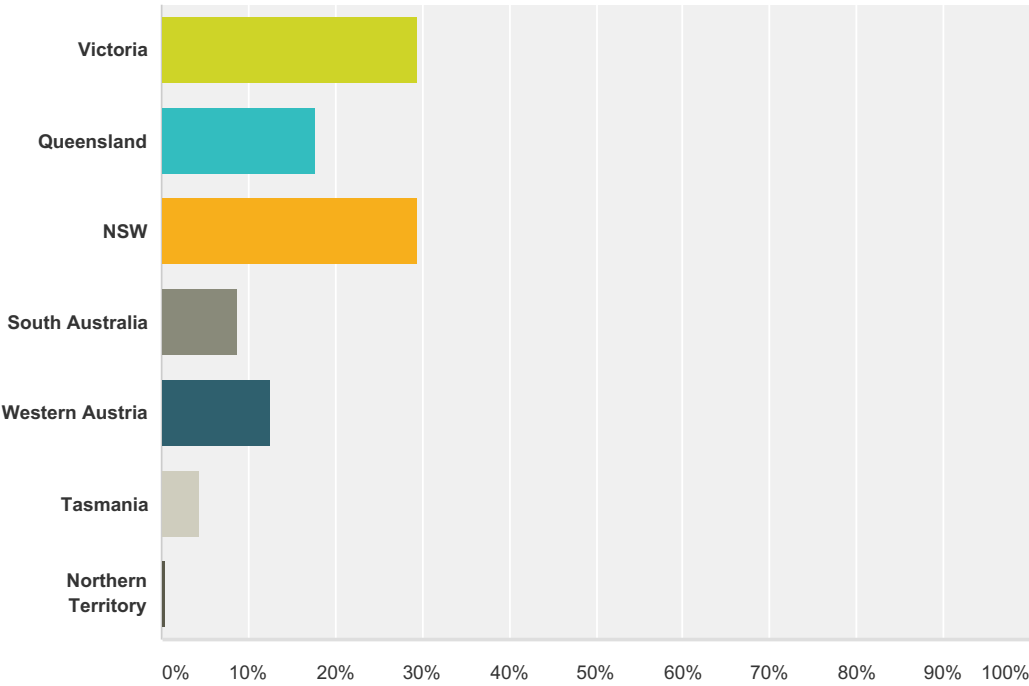
Answered: 268 Skipped: 9



Answer Choices	Responses	
Below 10	33.58%	90
11-20	30.60%	82
21-35	23.88%	64
36-50	6.34%	17
51-80	3.36%	9
81-100	0.37%	1
101 or more	1.87%	5
Total		268

Q4 Which state/Territory is your shop in?

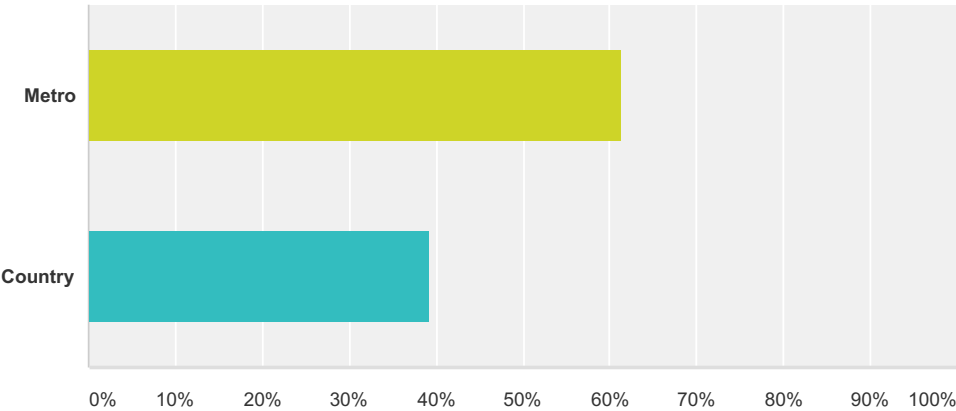
Answered: 272 Skipped: 5



Answer Choices	Responses	
Victoria	29.41%	80
Queensland	17.65%	48
NSW	29.41%	80
South Australia	8.82%	24
Western Australia	12.50%	34
Tasmania	4.41%	12
Northern Territory	0.37%	1
Total Respondents: 272		

Q5 Are you a rural or city repairer

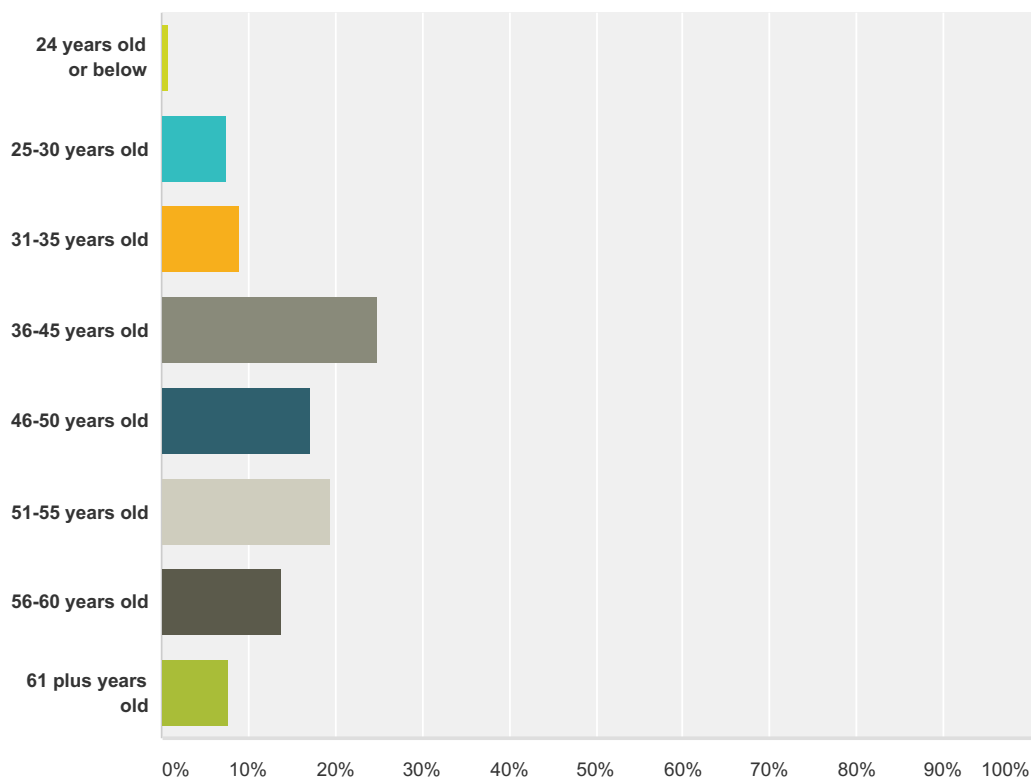
Answered: 267 Skipped: 10



Answer Choices	Responses	
Metro	61.42%	164
Country	39.33%	105
Total Respondents: 267		

Q6 How old are you?

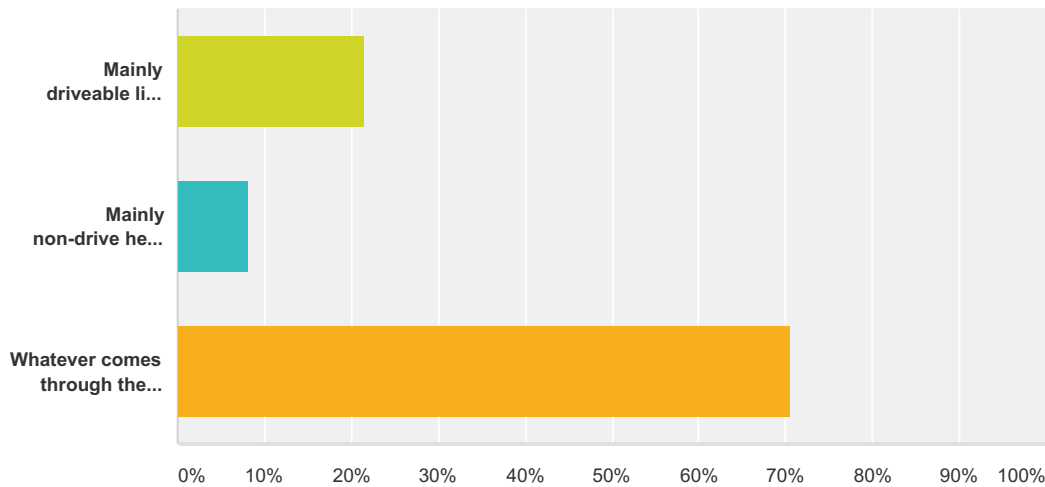
Answered: 269 Skipped: 8



Answer Choices	Responses
24 years old or below	0.74% 2
25-30 years old	7.43% 20
31-35 years old	8.92% 24
36-45 years old	24.91% 67
46-50 years old	17.10% 46
51-55 years old	19.33% 52
56-60 years old	13.75% 37
61 plus years old	7.81% 21
Total	269

Q7 What sort of work do you do?

Answered: 271 Skipped: 6



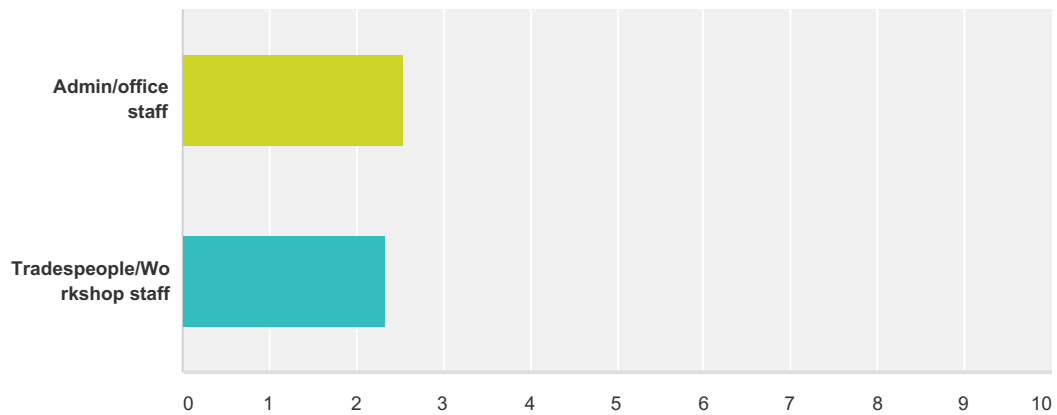
Answer Choices	Responses	
Mainly driveable light repairs	21.40%	58
Mainly non-drive heavy repairs	8.12%	22
Whatever comes through the door	70.48%	191
Total		271

Q8 Total number of staff?

Answered: 268 Skipped: 9

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

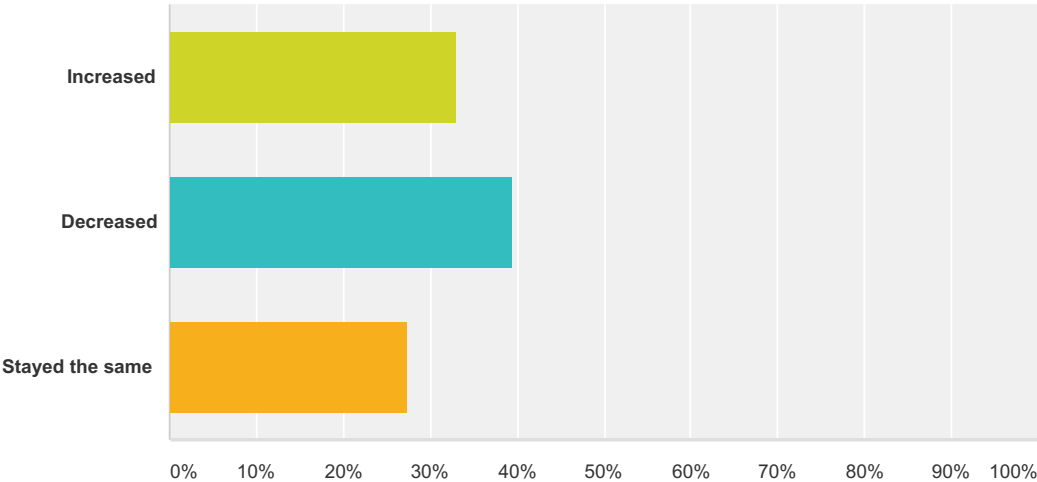
Answered: 270 Skipped: 7



	Increased	Decreased	Stayed the same	(no label)	(no label)	Total	Weighted Average
Admin/office staff	15.59% 41	13.69% 36	70.72% 186	0.00% 0	0.00% 0	263	2.55
Tradespeople/Workshop staff	21.91% 55	23.51% 59	54.58% 137	0.00% 0	0.00% 0	251	2.33

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?

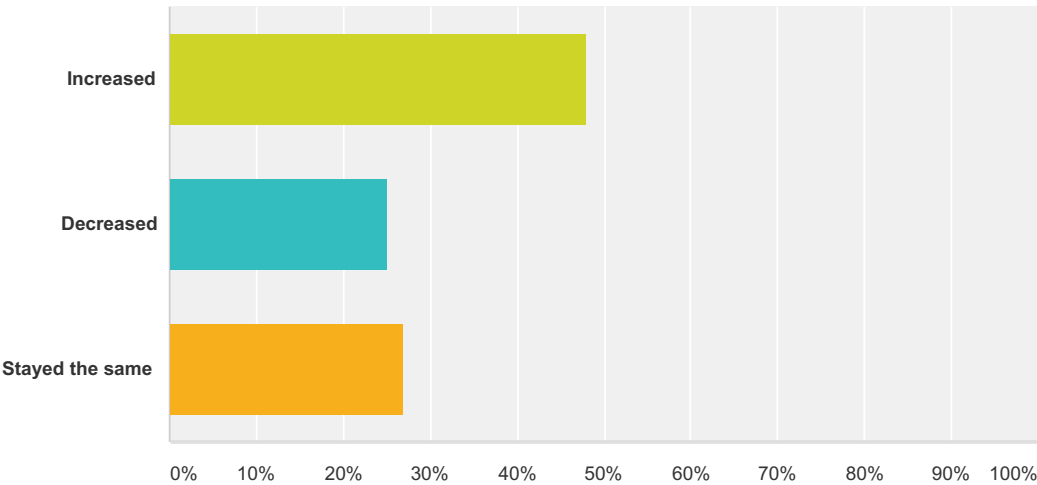
Answered: 266 Skipped: 11



Answer Choices	Responses	
Increased	33.08%	88
Decreased	39.47%	105
Stayed the same	27.44%	73
Total		266

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

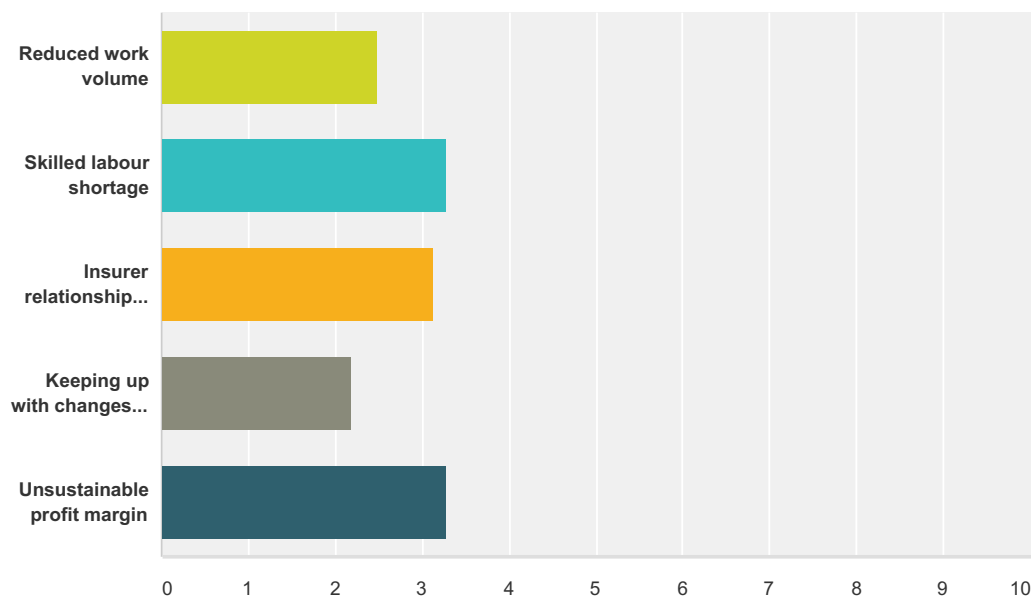
Answered: 271 Skipped: 6



Answer Choices	Responses	
Increased	47.97%	130
Decreased	25.09%	68
Stayed the same	26.94%	73
Total		271

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

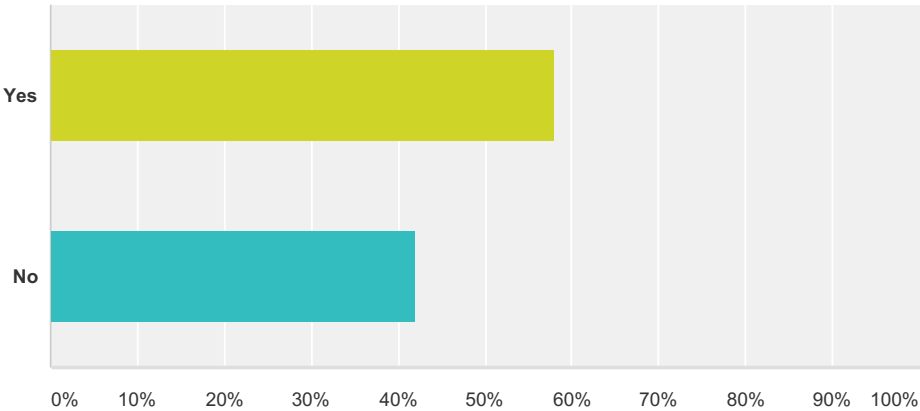
Answered: 270 Skipped: 7



	Not an issue	A little concerned	Quite concerned	It's a real worry	Very concerned	Total	Weighted Average
Reduced work volume	25.77% 67	36.92% 96	14.62% 38	7.69% 20	15.00% 39	260	2.49
Skilled labour shortage	14.34% 38	20.75% 55	16.60% 44	19.62% 52	28.68% 76	265	3.28
Insurer relationship issues	14.55% 39	25.00% 67	19.03% 51	15.30% 41	26.12% 70	268	3.13
Keeping up with changes in vehicle technology - equipment and training	31.82% 84	37.50% 99	17.80% 47	5.30% 14	7.58% 20	264	2.19
Unsustainable profit margin	10.53% 28	25.56% 68	18.80% 50	16.92% 45	28.20% 75	266	3.27

Q13 Are you a member of the MTA?

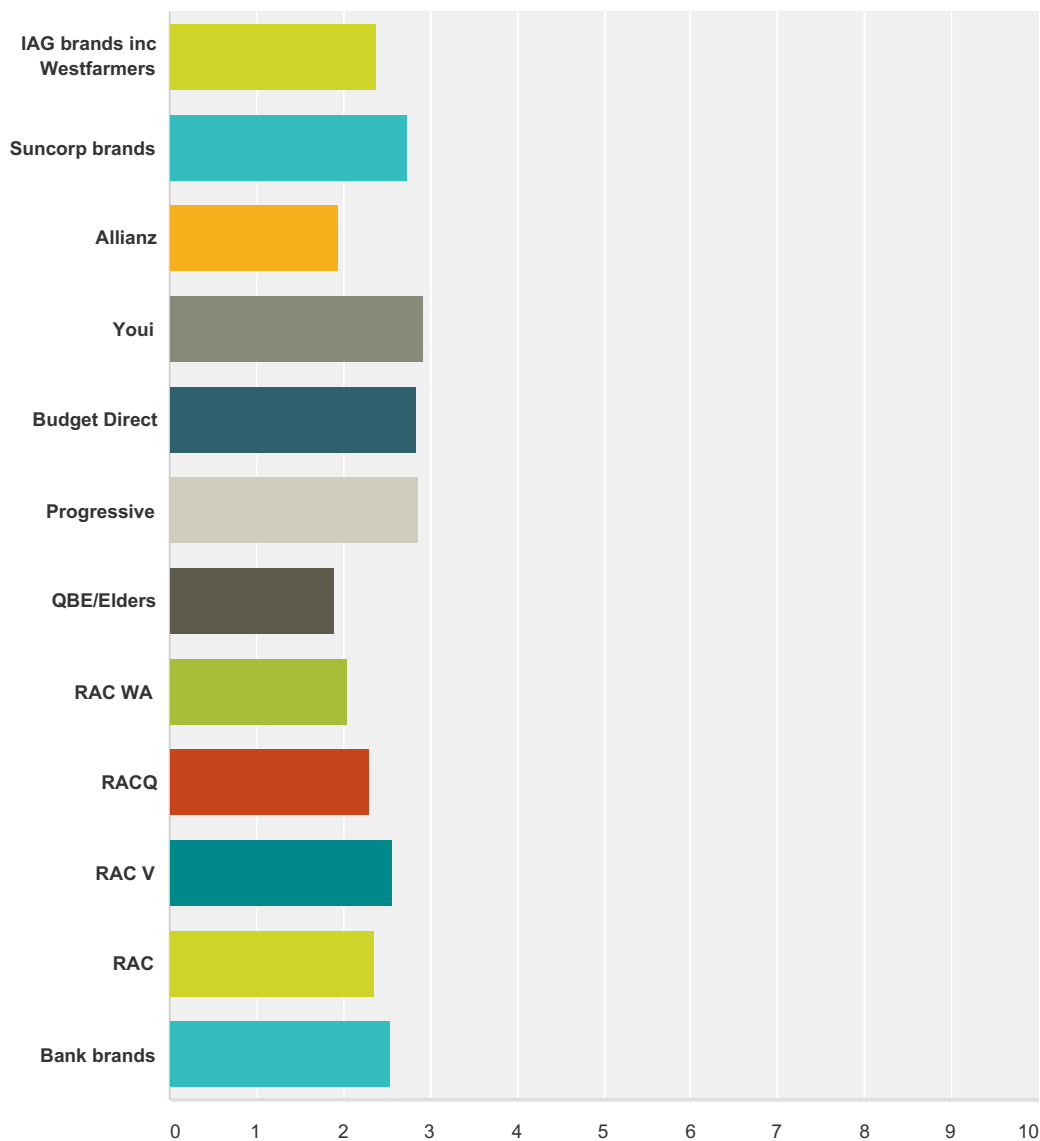
Answered: 267 Skipped: 10



Answer Choices	Responses	
Yes	58.05%	155
No	41.95%	112
Total		267

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

Answered: 262 Skipped: 15



	Super simple	Acceptable	A bit of a fiddle	Complicated and time consuming	Total	Weighted Average
IAG brands inc Westfarmers	16.87% 42	46.18% 115	20.08% 50	16.87% 42	249	2.37
Suncorp brands	10.80% 27	35.20% 88	24.40% 61	29.60% 74	250	2.73
Allianz	30.43% 77	50.59% 128	12.25% 31	6.72% 17	253	1.95
Youi	11.39% 27	23.63% 56	26.16% 62	38.82% 92	237	2.92

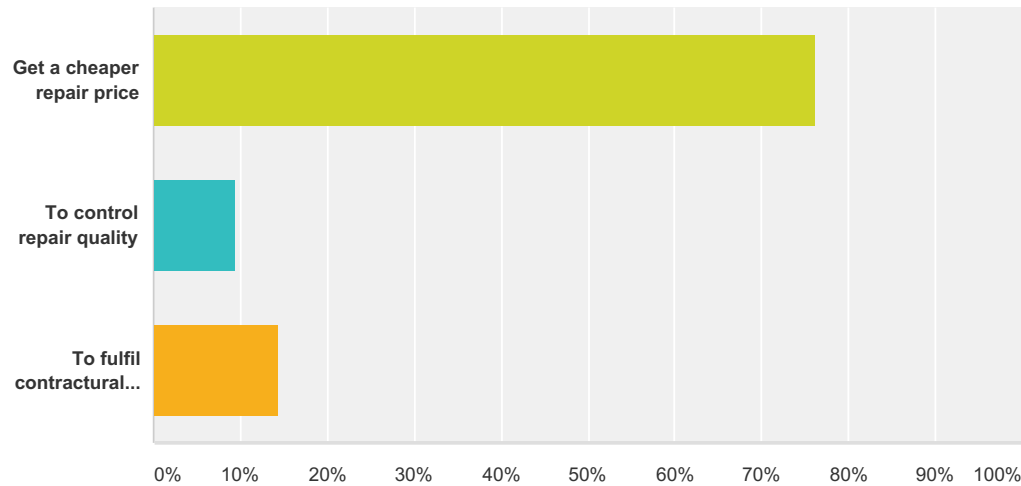
Budget Direct	6.88% 15	33.03% 72	29.82% 65	30.28% 66	218	2.83
Progressive	5.93% 8	34.81% 47	27.41% 37	31.85% 43	135	2.85
QBE/Elders	34.71% 84	47.11% 114	12.81% 31	5.37% 13	242	1.89
RAC WA	34.52% 29	39.29% 33	14.29% 12	11.90% 10	84	2.04
RACQ	20.83% 20	42.71% 41	22.92% 22	13.54% 13	96	2.29
RAC V	17.70% 20	33.63% 38	23.89% 27	24.78% 28	113	2.56
RAC	17.74% 11	43.55% 27	24.19% 15	14.52% 9	62	2.35
Bank brands	7.45% 14	45.74% 86	31.38% 59	15.43% 29	188	2.55

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

Answered: 238 Skipped: 39

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

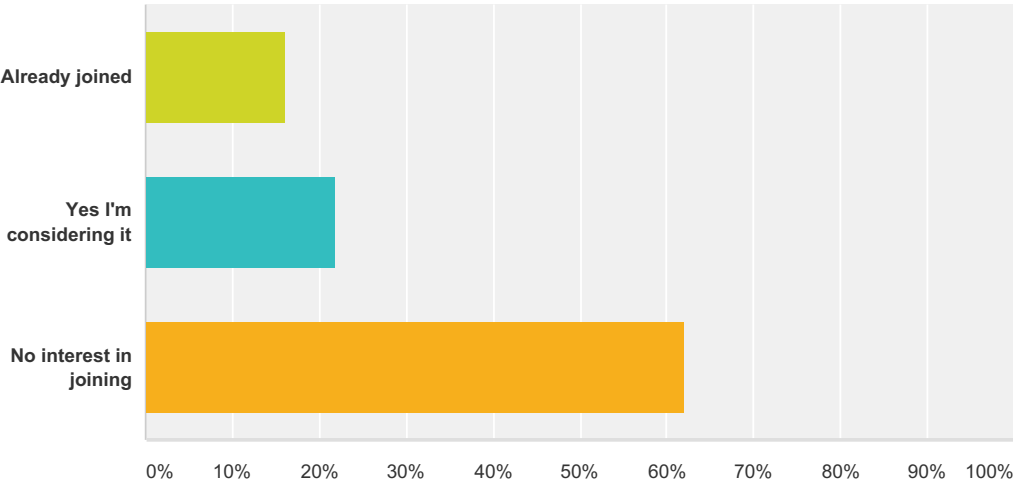
Answered: 269 Skipped: 8



Answer Choices	Responses	
Get a cheaper repair price	76.21%	205
To control repair quality	9.29%	25
To fulfil contractual obligations	14.50%	39
Total		269

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

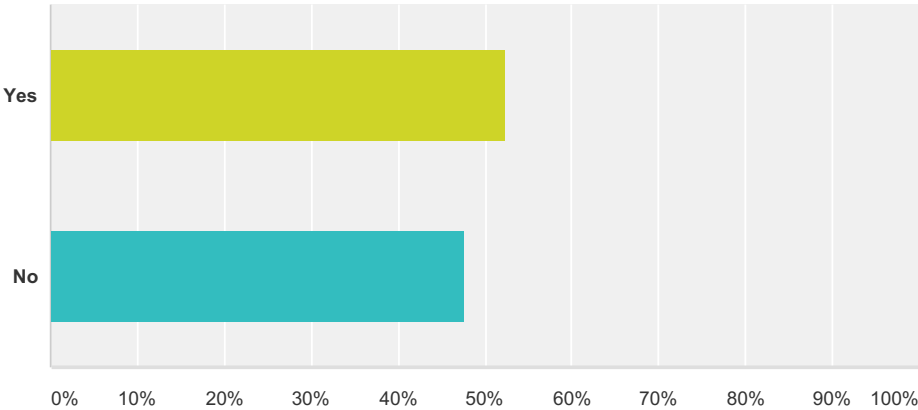
Answered: 268 Skipped: 9



Answer Choices	Responses	
Already joined	16.04%	43
Yes I'm considering it	22.01%	59
No interest in joining	61.94%	166
Total		268

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

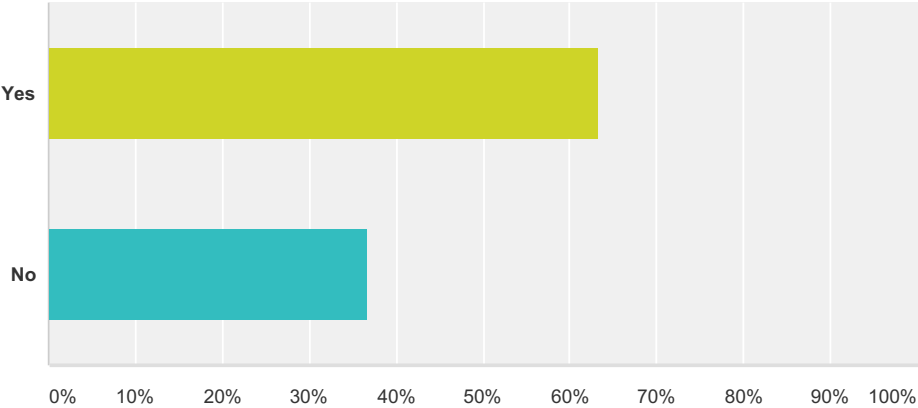
Answered: 267 Skipped: 10



Answer Choices	Responses	
Yes	52.43%	140
No	47.57%	127
Total		267

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

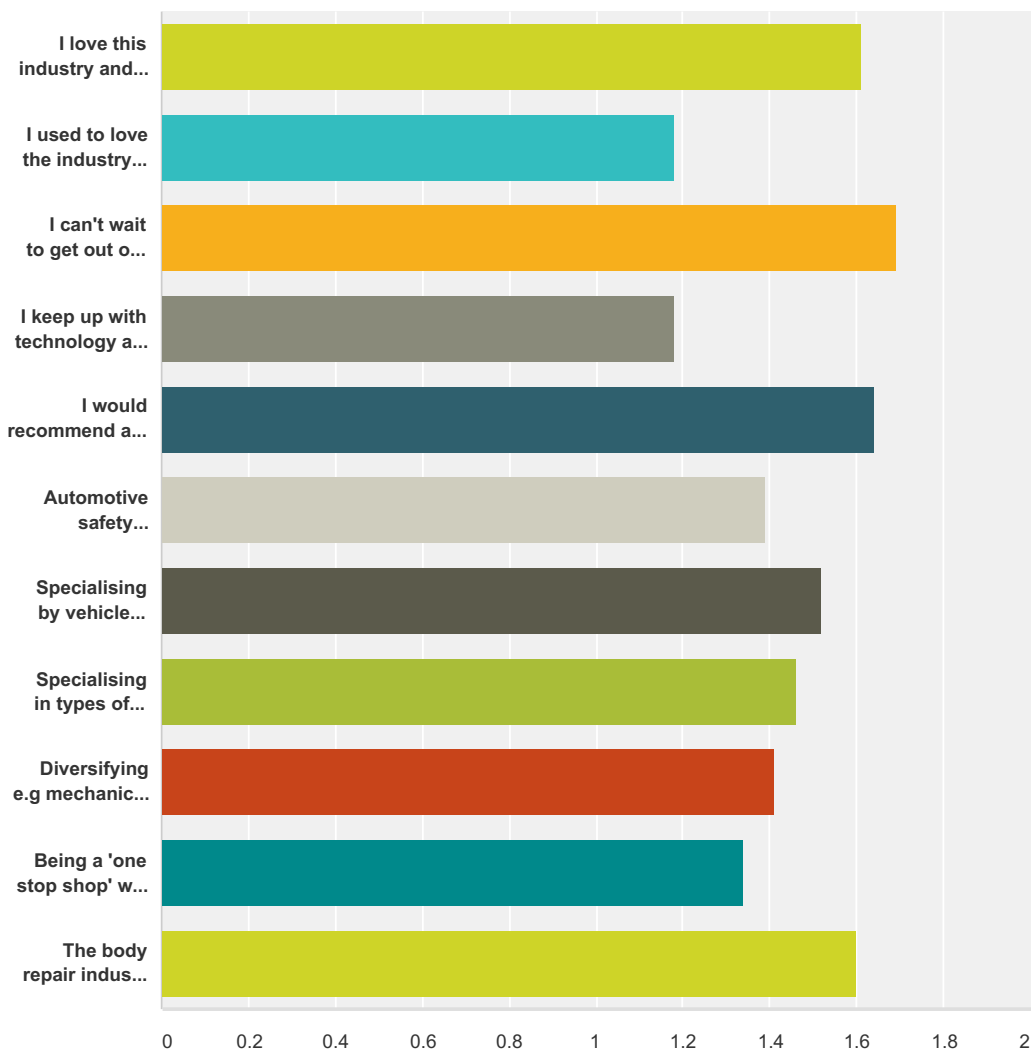
Answered: 269 Skipped: 8



Answer Choices	Responses	
Yes	63.20%	170
No	36.80%	99
Total		269

Q20 Please read the following statements about the industry and say if you agree with them.

Answered: 272 Skipped: 5

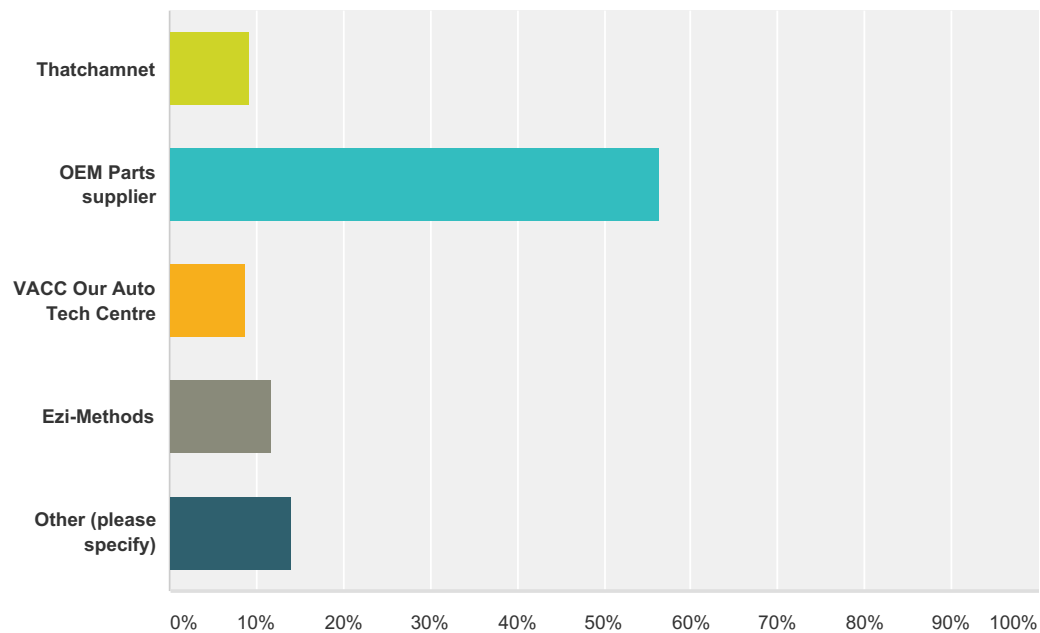


	Agree	Disagree	Total	Weighted Average
I love this industry and am excited about the future	39.02% 103	60.98% 161	264	1.61
I used to love the industry but it is getting to hard to make a profit	81.99% 223	18.01% 49	272	1.18
I can't wait to get out of the industry	31.27% 81	68.73% 178	259	1.69
I keep up with technology and undertake training/get my staff to undertake training to ensure my shop uses the latest repair methods	82.26% 218	17.74% 47	265	1.18
I would recommend a career in the body repair industry to my children and to the younger generation in general	35.85% 95	64.15% 170	265	1.64

Automotive safety technology will mean far fewer accidents and much less volume in five years time	60.90% 162	39.10% 104	266	1.39
Specialising by vehicle groups eg prestige, Japanese, European etc will be the way to thrive in the future	47.67% 123	52.33% 135	258	1.52
Specialising in types of repair such as heavy or light will be the way to thrive in the future	54.05% 140	45.95% 119	259	1.46
Diversifying e.g mechanical repair, trucks, boats, caravans will be the way to thrive in the future	58.85% 153	41.15% 107	260	1.41
Being a 'one stop shop' will be the way to thrive in the future	66.41% 170	33.59% 86	256	1.34
The body repair industry as we currently know it (eg paint and panel shops only) will not exist in 10 years time	40.46% 106	59.54% 156	262	1.60

Q21 Where do you source your repair information from?

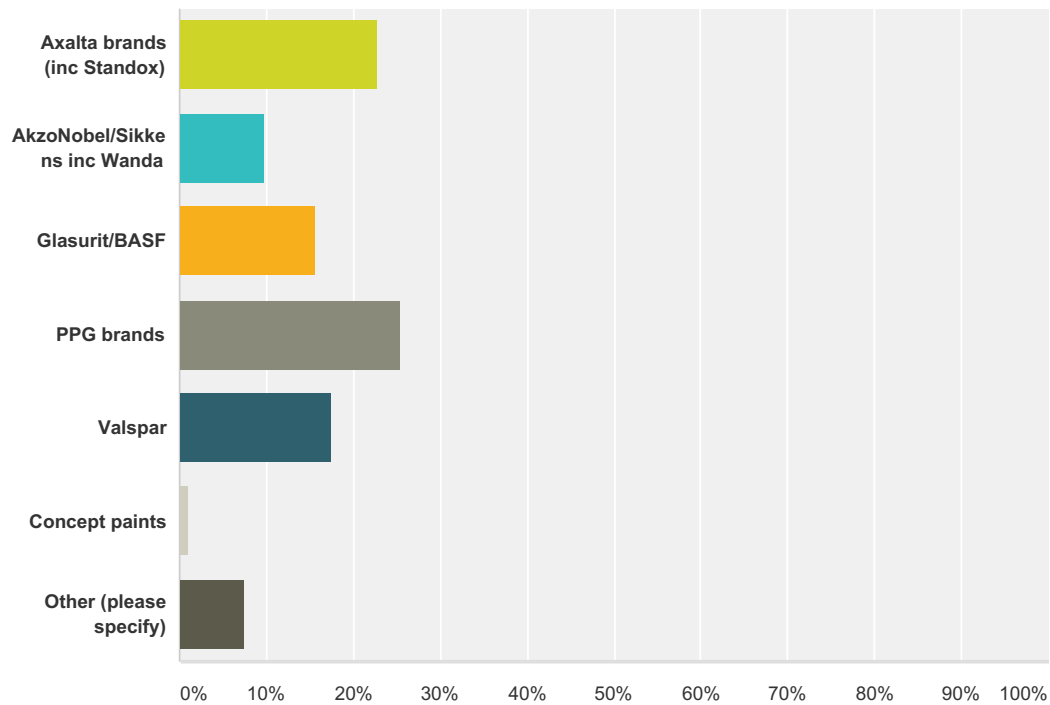
Answered: 263 Skipped: 14



Answer Choices	Responses
Thatchamnet	9.13% 24
OEM Parts supplier	56.27% 148
VACC Our Auto Tech Centre	8.75% 23
Ezi-Methods	11.79% 31
Other (please specify)	14.07% 37
Total	263

Q22 Which paint does your shop use?

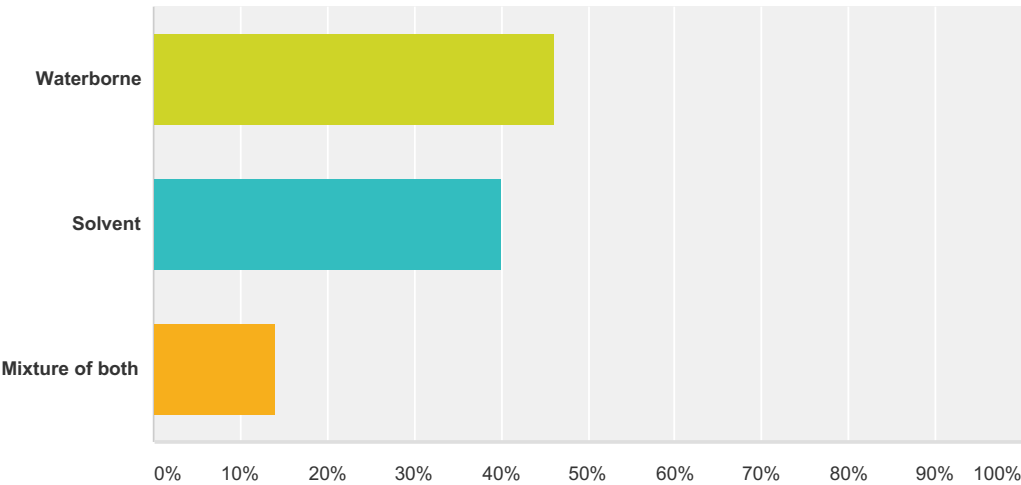
Answered: 267 Skipped: 10



Answer Choices	Responses
Axalta brands (inc Standox)	22.85% 61
AkzoNobel/Sikkens inc Wanda	9.74% 26
Glasurit/BASF	15.73% 42
PPG brands	25.47% 68
Valspar	17.60% 47
Concept paints	1.12% 3
Other (please specify)	7.49% 20
Total	267

Q23 Does your shop use solvent or waterborne paint?

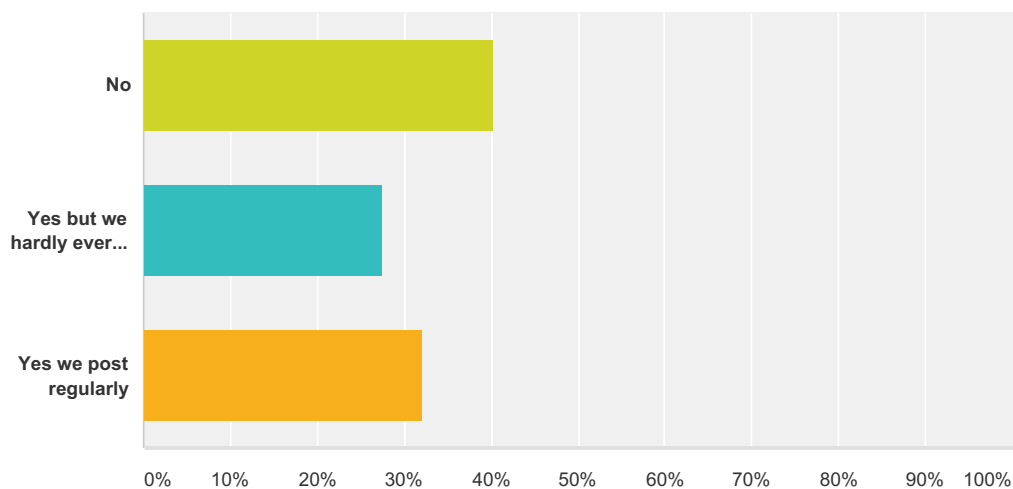
Answered: 265 Skipped: 12



Answer Choices	Responses	
Waterborne	46.04%	122
Solvent	40.00%	106
Mixture of both	13.96%	37
Total		265

Q24 Do you have a Facebook page?

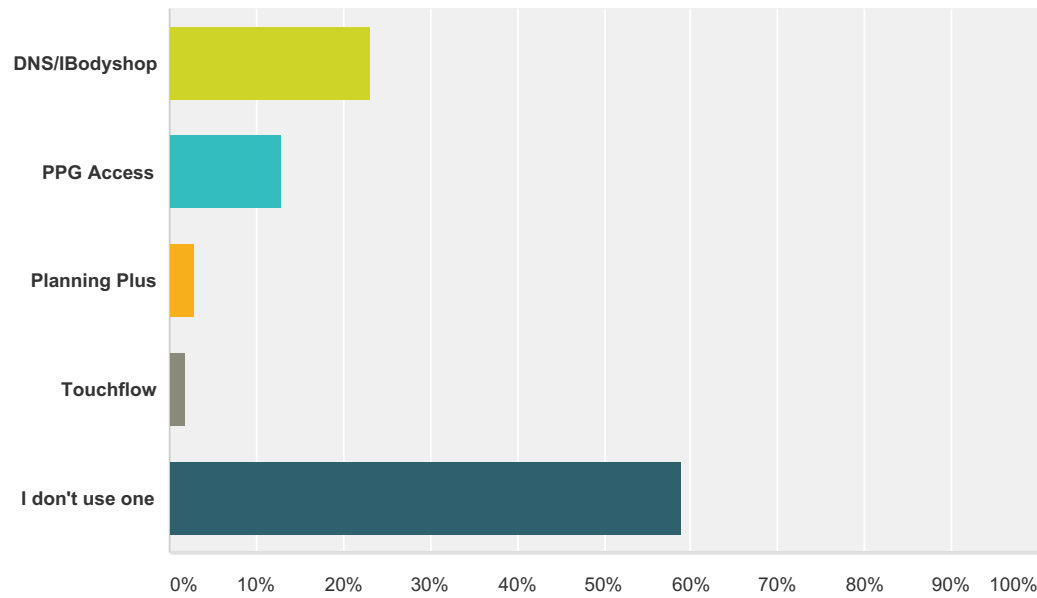
Answered: 268 Skipped: 9



Answer Choices	Responses	
No	40.30%	108
Yes but we hardly ever post	27.61%	74
Yes we post regularly	32.09%	86
Total		268

Q25 Which workshop management system do you use?

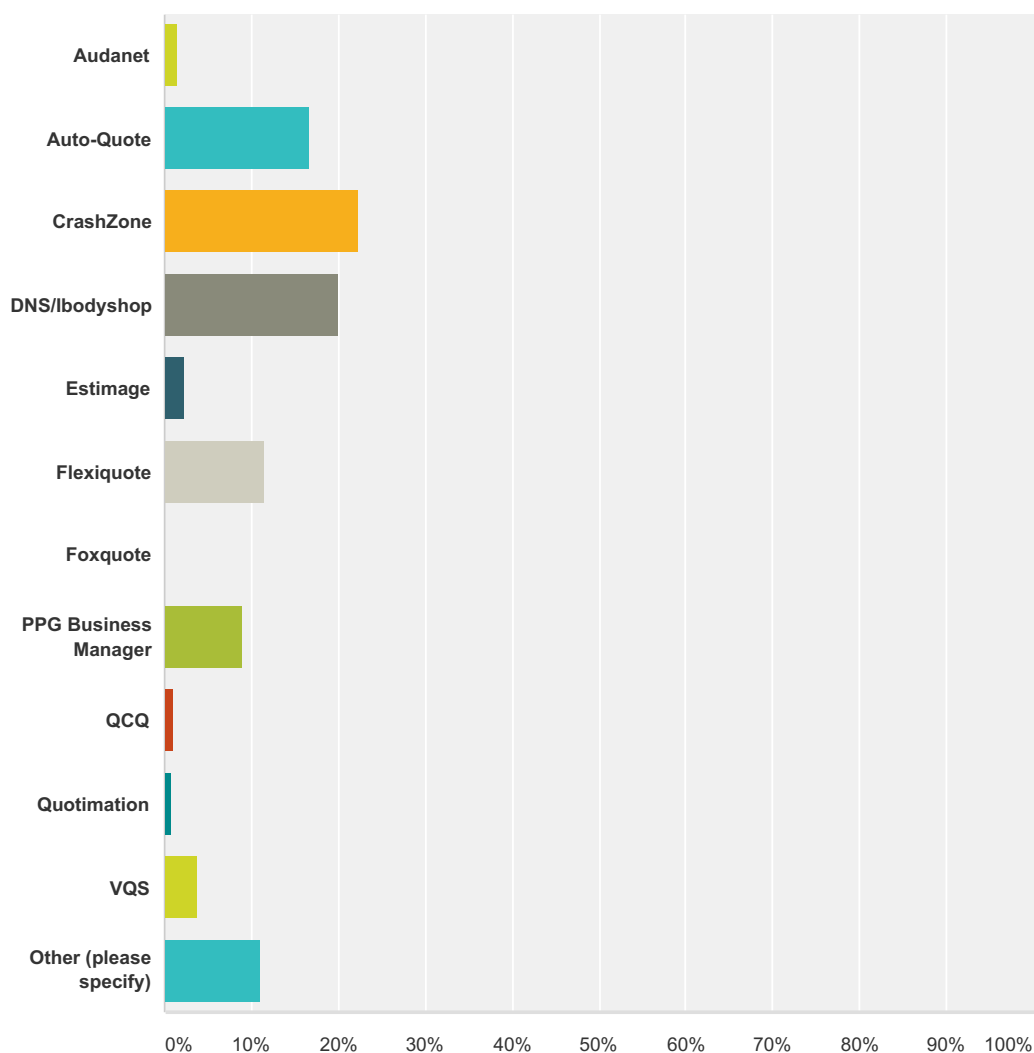
Answered: 207 Skipped: 70



Answer Choices	Responses	
DNS/IBodyshop	23.19%	48
PPG Access	13.04%	27
Planning Plus	2.90%	6
Touchflow	1.93%	4
I don't use one	58.94%	122
Total		207

Q26 Which quoting package/s do you use? You can check more than one.

Answered: 269 Skipped: 8

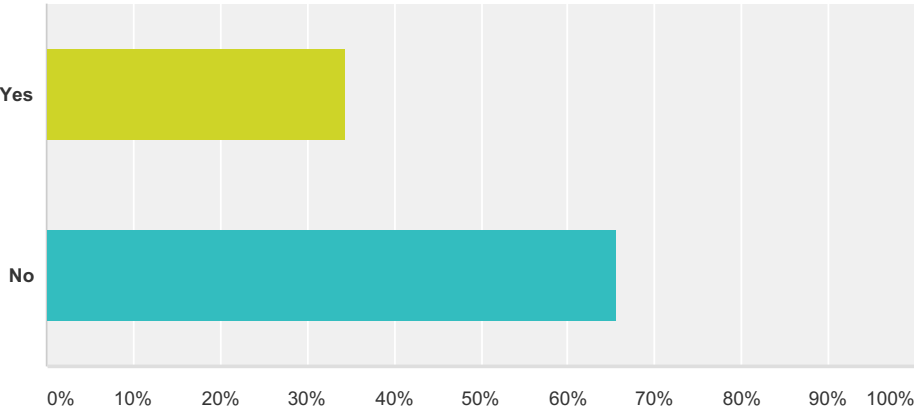


Answer Choices	Responses
Audanet	1.49% 4
Auto-Quote	16.73% 45
CrashZone	22.30% 60
DNS/lbodyshop	20.07% 54
Estimage	2.23% 6
Flexiquote	11.52% 31
Foxquote	0.00% 0
PPG Business Manager	8.92% 24
QCQ	1.12% 3

Quotimation	0.74%	2
VQS	3.72%	10
Other (please specify)	11.15%	30
Total		269

Q27 Do you have an exit plan or succession plan in place for your business?

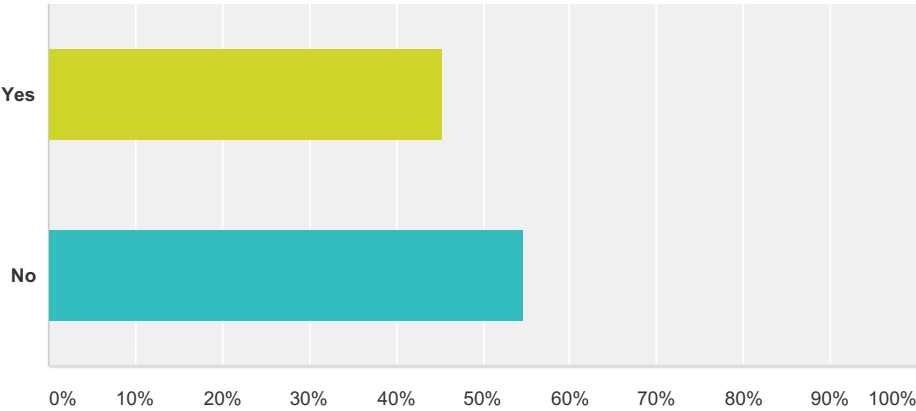
Answered: 267 Skipped: 10



Answer Choices	Responses	
Yes	34.46%	92
No	65.54%	175
Total		267

Q28 Will you be taking part in the national shop grading program?

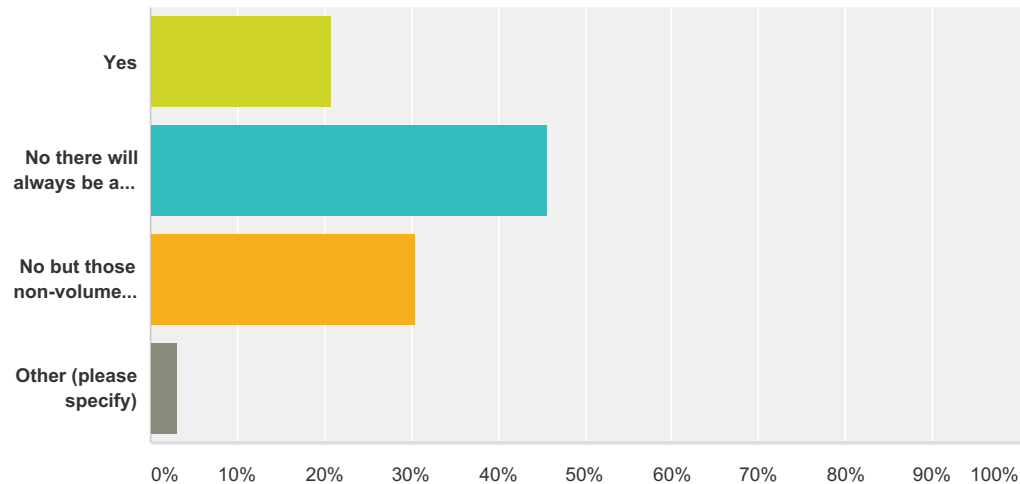
Answered: 256 Skipped: 21



Answer Choices	Responses	
Yes	45.31%	116
No	54.69%	140
Total		256

Q29 Given the rate of consolidation do you think think that only 'volume' shops will survive in the 10 years?

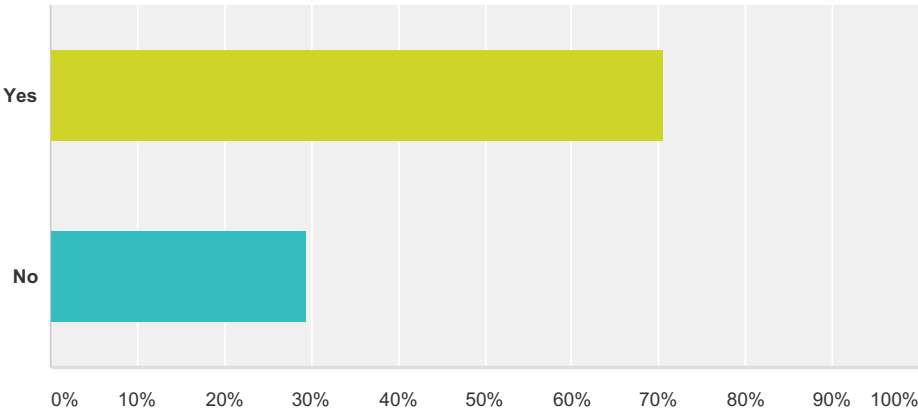
Answered: 263 Skipped: 14



Answer Choices	Responses	
Yes	20.91%	55
No there will always be a need for independent repair shops	45.63%	120
No but those non-volume shops will have to specialise in some way to remain viable	30.42%	80
Other (please specify)	3.04%	8
Total		263

Q30 Does your shop employ apprentices?

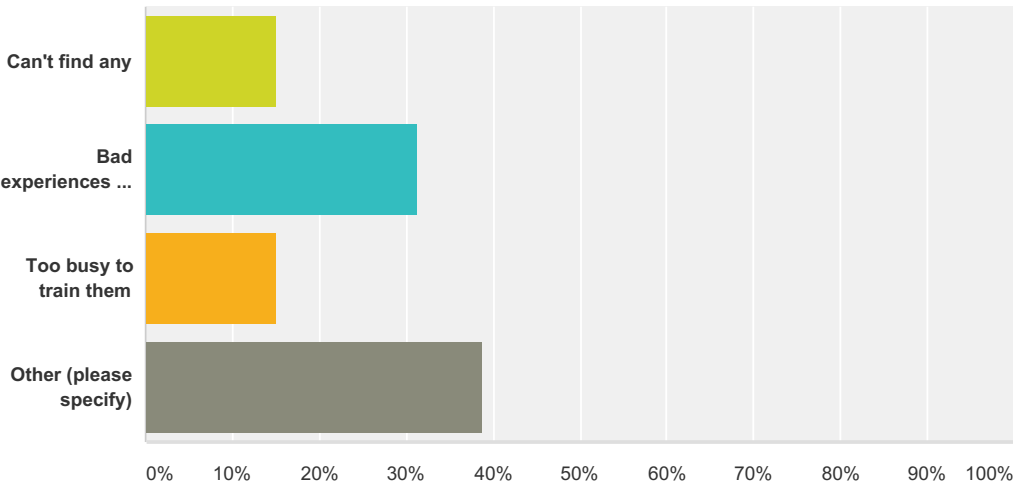
Answered: 269 Skipped: 8



Answer Choices	Responses	
Yes	70.63%	190
No	29.37%	79
Total		269

Q31 Why don't you employ apprentices?

Answered: 80 Skipped: 197



Answer Choices	Responses
Can't find any	15.00%12
Bad experiences in the past	31.25%25
Too busy to train them	15.00%12
Other (please specify)	38.75%31
Total	80