

Notice to all Accredited Collision and Glass Registered Account Holders

Manitoba Light Vehicle Repair Industry Survey Results

Date published: April 1, 2025

In December 2024, MPI invited contacts from light vehicle repair shops to participate in a voluntary online survey. MPI's intent for the survey was to better understand the issues and challenges facing Manitoba repair shops, and how MPI provides service.

MPI emailed a total of 433 invitations to all accredited collision and glass registered account holders.

- 123 completed surveys were received, for a completion rate of 28%.
- Among the completes, 79 were from the 'non-Winnipeg' regions.
- 44 completed surveys were in the Winnipeg region.
- 95 completed surveys were from autobody & frame shops.
- 28 completed surveys were from glass only shops.
- 89 completed surveys were from shops that self-identified as being independently owned
- 10 completed surveys were from Multiple Shop Operator (MSO) / franchise shops.
- 14 completed surveys were from dealer owned shops.

Please direct any general questions regarding the survey to Partners@mpi.mb.ca, or if you are assigned to a Shop Relationship Advisor, SRA@mpi.mb.ca.

Thank you for your participation in this survey. Complete survey results are viewable below.



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Research and Report Notes

- The survey used a 1 to 7 scale, throughout this report the percentage displayed is the percentage who provided a 6 or 7 response (e.g., those who are *satisfied* or *positively agree* with a statement). This ‘top box’ has been adopted by MPI as it provides a high bar for which to hold itself in terms of service provided to customers and business partners.
- Some questions were not asked of glass only shops if it did not apply to their type of business, these questions are indicated in footnotes.
- Exercise caution when interpreting results from sub-categories with smaller sample sizes (i.e., MSO/franchise and dealer shops).
- Results do not take into account the volume of work but rather reflect only the survey respondents. For example, while respondents from the Winnipeg region constitute 36% of all respondents, the actual volume of repairs in the Winnipeg region may be a larger proportion than 36% of all repairs province-wide.
- Open-ended response tables may sum to more than 100% as a single respondent may provide multiple unique mentions in their feedback. Unique mentions are only indicated in tables if more than one respondent indicated it.
- The Winnipeg region is based on MPI’s Territory 1 (i.e., Winnipeg and the communities that directly border the city such as Headingley, East and West St. Paul).
- For the shop profile question, respondents selected from *independent*, *Multiple Shop Operator / franchise*, and *dealer*; as well as *prefer not to specify / not sure*.
- An appendix of the attributes and make-up of shops that responded to the survey is included, however it reflects only the survey respondents and may differ from internal or industry information.

Key Insights

Impressions Regarding MPI Programs and Services

Overall, results show that Manitoba Public Insurance's services and programs have room and opportunities for improvement. In many instances, glass only shops and Multiple Shop Operator (MSO)/franchise shops are more satisfied than their counterparts (autobody & frame shops and independent shops, respectively).

The aspects with the lowest satisfaction levels are:

- Shop Measures Program (16%, down from 29% in 2020).
- Performance Recognition Program (17%, down from 28% in 2020).
- Ease of doing business with MPI (24%, a notable decrease from 40% in 2020).
- Amount of communications received from MPI (25%, a notable decrease from 44% in 2020).
- Feedback and guidance received from MPI (25%, down from 36% in 2020).
- Overall level of service received from MPI (29%, up from 28% in 2020).

Compared to the aspects listed above, in 2024 there was slightly higher levels of satisfaction with the:

- Effectiveness of software and online services (43%, down from 52% in 2020).
- Direct Repair Program (44%, a notable decrease from 63% in 2020).

Among those who are *not satisfied* with the overall level of service received from MPI, the most common suggestion for improvement is for *Estimators and Adjusters to provide better response times, be more accessible, and have more effective communication with their shop (including being more professional and less biased)*. Respondents also cited a need for *more competent and caring estimators and other MPI staff / make them more accountable*. Some also mentioned for MPI to *reduce red tape / MPI is too bureaucratic / MPI is too inefficient*, as well for MPI to *be fairer / more cooperative relationship with MPI / treat shops with dignity and respect*.

Repair Procedure Software

Respondents were asked to indicate what Repair Procedure Software their business provides to its staff above and beyond Mitchell Tech-Advisor. Most shops (55%) indicate All data, followed by OEM site subscription (39%). A further 14% indicated another software not listed, when asked the most common other software was Repair Logic (33% among other software, 5% among all respondents) and Sun Collision (20% among other software, 3% among all respondents).

Business Sustainability

Respondents were presented a list of aspects that may be crucial for their business in the upcoming years and were asked to rank the aspects from most to least crucial using a numeric "1" for their top 'number one' aspect, "2" for the second most crucial aspect, and so on. The results are the following mean ranking provided, as such the lower the mean rank the more crucial (i.e., the closer it is to "#1").

- Finding qualified employees in any role (2.0).
- Retaining employees (3.0).
- Vehicle complexity (3.1).
- Repair information availability (3.3).
- Training (e.g., availability and quality of instruction) (3.4).

When asked what MPI could do to support shops' business regarding those specific aspects, the most common responses were the *hourly labour rate needing to be increased / higher rates allow shops to pay technicians more and retain staff*, and to *get more people training in the trade / promote education in the trade*.

Respondents were asked in general about other aspects that are crucial for their business in the upcoming years. The most recurring aspect mentioned is that *hourly labour rates need to increase*, followed by *Administration costs should be increased / included*.

About half of respondents (49%) indicate that there were changes as a result of the MPI strike in 2023 that they would like to permanently see remain in place, though this sentiment is notably less among glass only shops (13%). Of those who want strike-related changes to remain permanent, the most frequent mention was *higher Automatic Approval amounts*, followed by *increasing Direct Repair eligibility / have more DR claims*.

When asked about their support for possibly introducing the ability on Direct Repair (DR) estimates using Photo Based Estimating as an option for DR allowing shops to start the initial estimating process for schedule priority, the support is split with 38% supporting such a change, while 41% do not support that change, and 20% are not sure. Shops in Winnipeg are slightly more likely to support such a change than non-Winnipeg shops (44% and 35%, respectively).

Compensation and Policies

Respondents provided dollar amounts for various aspects that they believe would be fair for both their shop and MPI's ratepayers. See the detailed table in the Compensation and Policies section.

About two in five (39%) specified that MPI should consider tier-based compensation such as a differential labour rate based on a repair facility's investment in tooling, training and repair capabilities, while a virtually identical proportion (40%) indicate that this should not be considered, and the remaining 20% are not sure.

When asked what changes they would like to see to any policies, procedures, estimating standards, or parts rules, the most common suggested changes are *Glass and ADAS claims are not paying enough*, and to *increase rates / keep up with inflation (in general)*, followed by *Realized Parts Savings amounts are too high / unrealistic*.

Respondents were presented a list of aspects that may be crucial for their business in the upcoming agreement and were asked to rank the aspects. The results are the following mean ranking provided, as such the lower the mean rank the more crucial (i.e., the closer it is to "#1"). The top three most crucial aspects are:

- Increase Blend Time Allowance (3.6).
- Increase Total Loss Teardown per Claim (3.7).
- Increase ADAS Calibration Allowance (4.0).

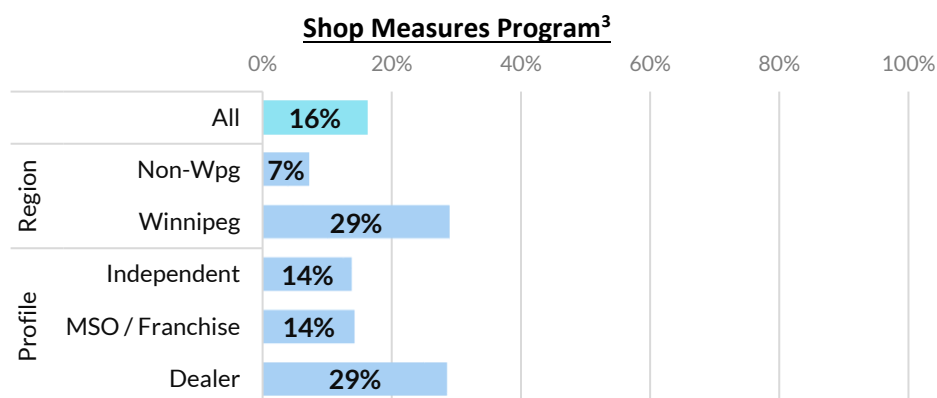
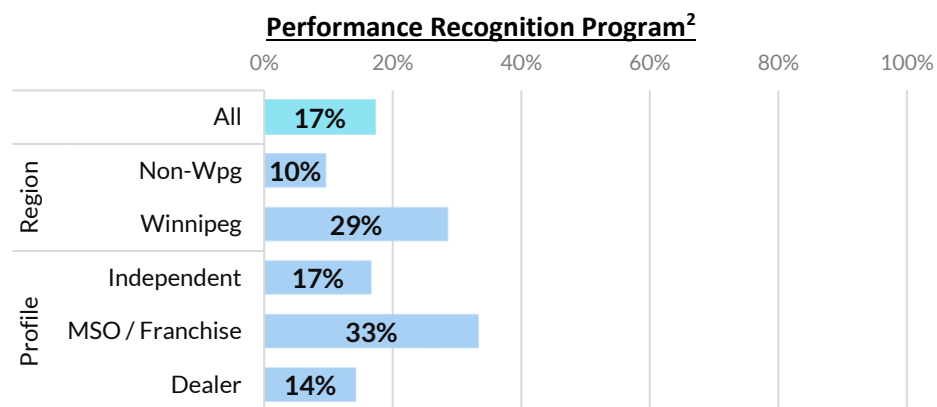
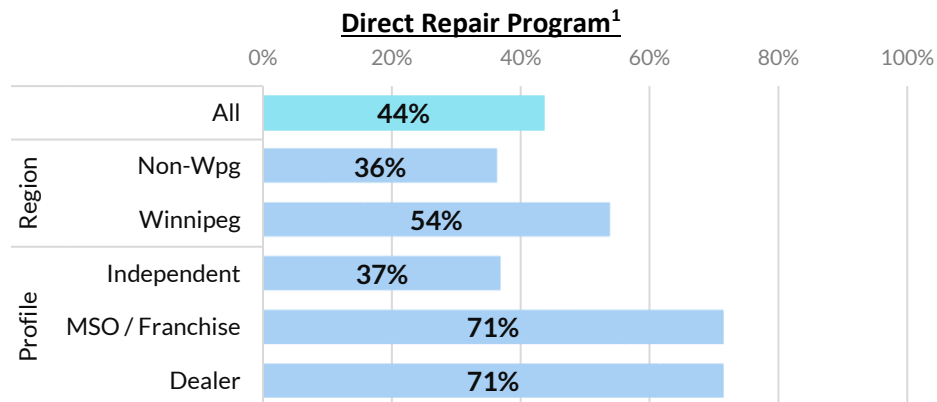
Note that throughout there is variation in sentiments, particularly when comparing autobody & frame shops to glass only shops.



Manitoba Public Insurance Requirements and Services

Programs and Services

Satisfaction with the:



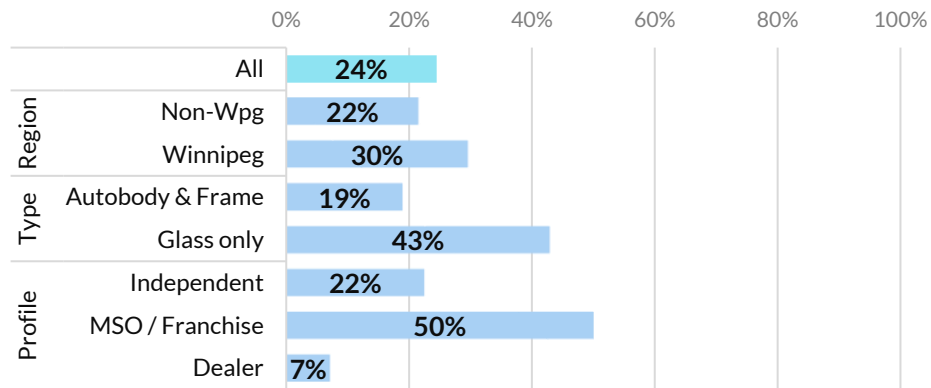
¹ Not asked to glass only shops.

² Ibid.

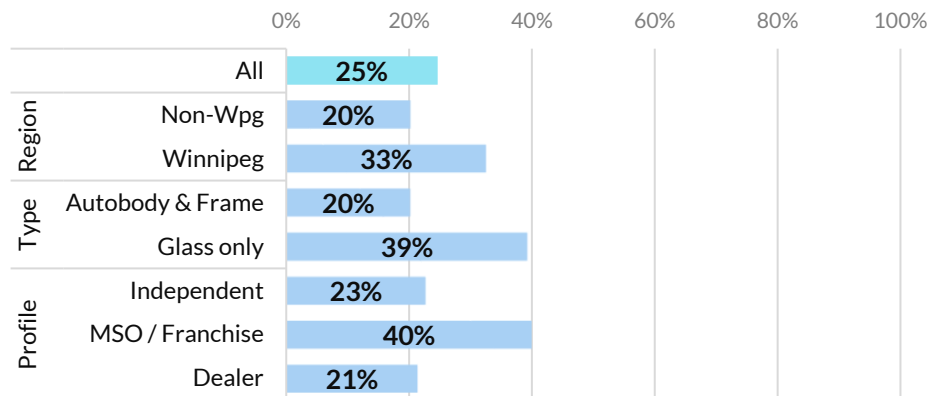
³ Ibid.



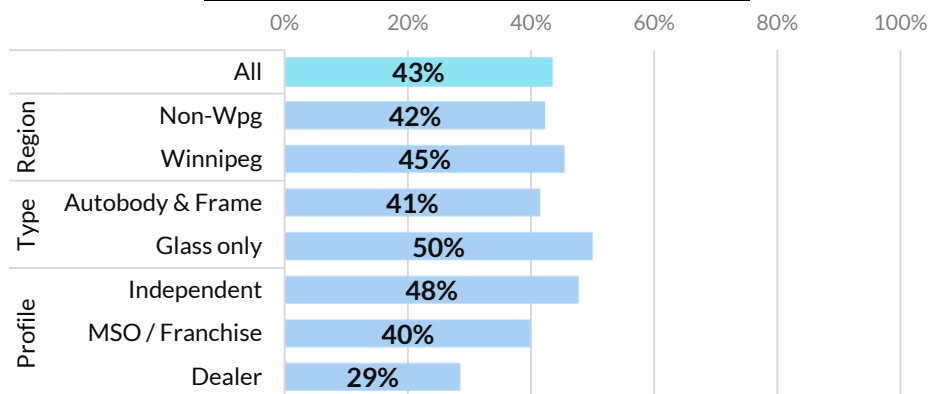
Ease of doing business with MPI



Feedback and guidance received from MPI

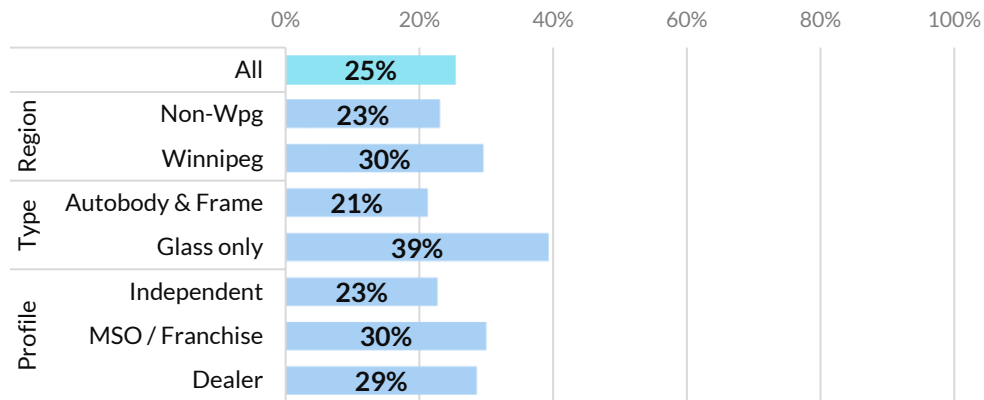


Effectiveness of software and online services

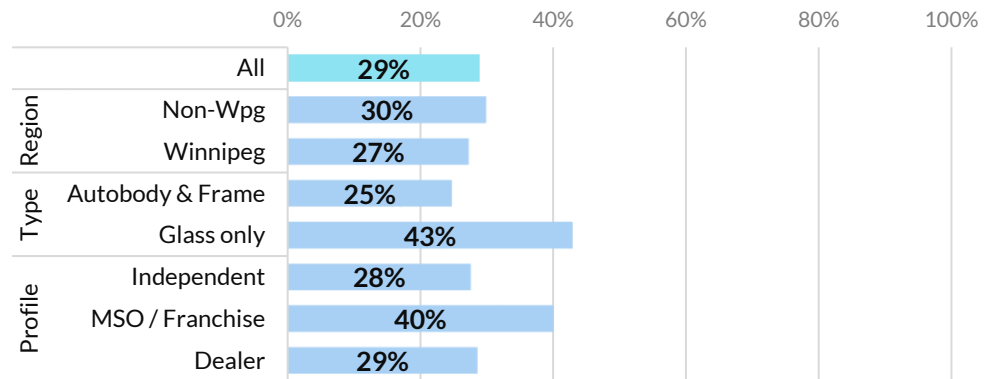




Amount of communications received from MPI



Overall level of service received from MPI

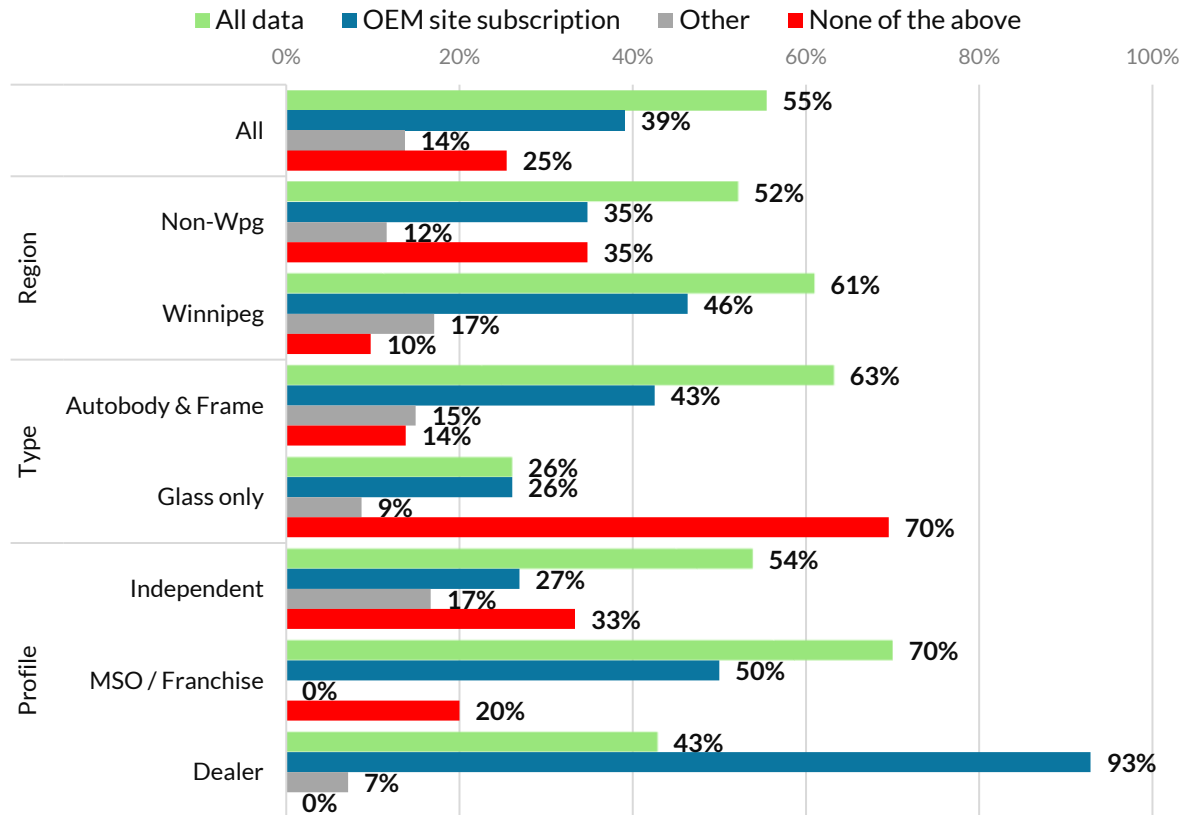


Suggestions for improvement to services received from MPI:

<u>Suggestion</u>	<u>% indicated*</u>
MPI estimators / adjusters need better response times, more accessibility, more consistency, better communication with shop (rude, biased in dealings, not fair)	33%
More competent and caring estimators and other MPI staff / make them more accountable	31%
Reduce red tape / MPI too bureaucratic / inefficient	26%
Fairer / more cooperative relationship with MPI / treat shops with dignity and respect	25%
General communication challenges with MPI (hours of operation, email vs fax, dealings with staff, staff passing off to another staff)	11%
Too much admin work / compensate for extra admin work	11%
Reduce unnecessary delays in completing claims	10%
MPI should provide more detailed / comprehensive information for each claim	7%
Pay proper rate for materials / labour / more flexibility regarding compensation	7%
Clearer / more consistent standards and procedures	5%
Get rid of Realized Parts Savings	5%
Better / more accurate estimates by MPI	3%
Compensate for shop writing estimates	3%
* As a respondent may provide more than one response, the sum of percentages may add to more than 100%. Open-ended findings pertain to only those who were asked the question (i.e., those who were not satisfied with the service they received: a 1-5 out of 7 rating). Responses coded with more than one mention.	

Repair Procedure Software

Which of the following Repair Procedure Software(s) does your business provide to its staff above and beyond Mitchell Tech-advisor?



Other software specified:

<u>Software</u>	<u>% within Other</u>	<u>% among all respondents</u>
Repair Logic	33%	5%
Sun Collision	20%	3%
Mitchell (in general)	13%	2%
Mitchell Pro Demand	13%	2%
Obtain information from dealers	13%	2%
OEM software (including specific to vehicle make)	13%	2%
Autobolt	7%	1%
Hunter Adas	7%	1%
Identifix	7%	1%
Launch	7%	1%
Mitchell Connect	7%	1%

As a respondent may provide more than one response, the sum of percentages may add to more than 100%.

* % within Other pertains to those who selected 'Other' (i.e., in addition to Tech-advisor, All data, and OEM site subscription) and is the percentage only of other software types.

** % among all respondents provides context of the software's use among all those who completed the survey, not just those who use another software application.

Business Sustainability

Upcoming crucial aspects for business

Respondents were presented a list of methods of aspects that may be crucial for their business in the upcoming years, and were asked to rank the aspects from most to least crucial using a numeric “1” for their top ‘number one’ aspect, “2” for the second most crucial aspect, and so on.

The following table is sorted with the top indicated aspect at the top, and the least crucial at the bottom. The results are the mean ranking provided, as such the lower the mean rank the more crucial (i.e., the closer it is to “#1”).

Ranking of crucial aspects for business in upcoming years, mean scores of ranking (sorted most to least crucial)⁴:

Aspect	All	Non- Wpg	Wpg	Autobody & frame	Glass only	Indep.	MSO	Dealer
Finding qualified employees in any role	2.0	1.9	2.2	1.9	2.5	2.1	2.3	1.9
Retaining employees	3.0	3.1	3.0	2.9	3.7	3.0	2.9	3.0
Vehicle complexity	3.1	2.9	3.4	3.2	2.4	2.9	3.1	3.6
Repair information availability	3.3	3.2	3.5	3.5	2.7	3.2	3.4	3.4
Training (e.g., availability and quality of instruction)	3.4	3.7	3.0	3.5	3.2	3.6	3.3	3.0

⁴ Due to smaller sample sizes regarding each ranking, results displayed only for all respondents combined.

What MPI could do to support your shop regarding these crucial aspects:

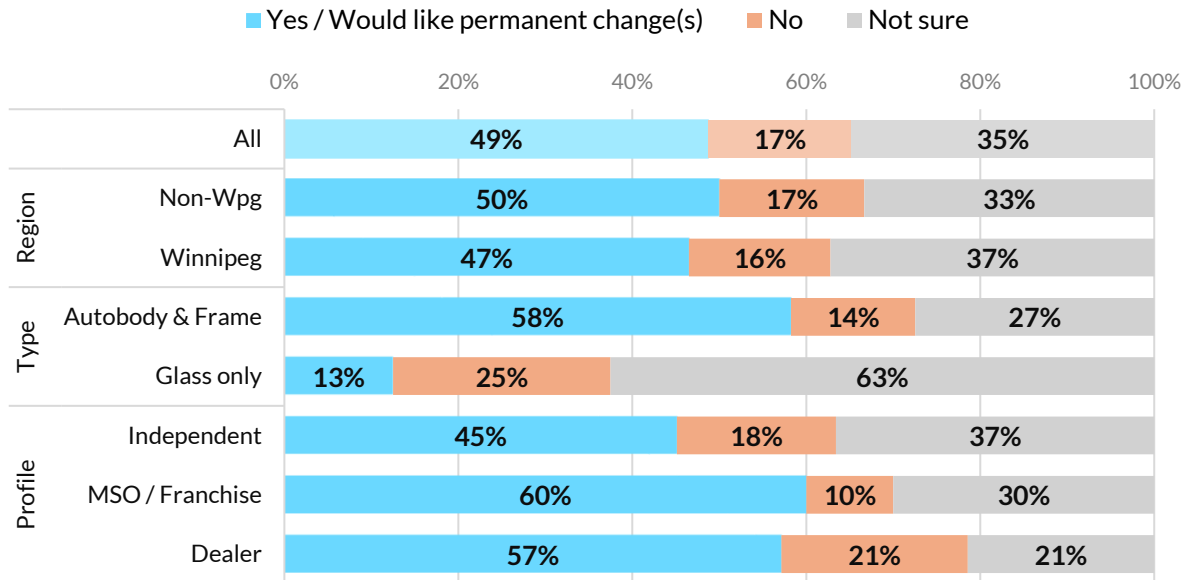
<u>Change</u>	<u>% indicated*</u>
Increase rates / labour rate / higher rates allow shops to pay technicians more and retain staff	38%
Get more people training in the trade / promote education in the trade / create more training opportunities (e.g., more locations) / subsidize training	23%
Scrap I-CAR / I-CAR is useless, redundant / replace I-CAR with a more reasonable qualification	22%
Improve information availability / clarity / being up-to-date (e.g., repair standards, procedures, diagrams)	15%
More relevant training / update training content / opt out or drop irrelevant content (including at Red River)	12%
MPI should provide training directly	9%
MPI should not charge for access to subscriptions (e.g., repair procedures)	8%
Simplify standards and procedures / don't be overly complicated	8%
Be less hostile to shops / MPI have a more respectful relationship with shops	6%
Reduce training and certification costs / I-CAR too expensive	5%
Be more accessible to shops / more helpful	3%
Facilitate equipment rentals / help finance equipment leasing	3%
MPI impacting labour availability by hiring estimators / talent pool reduced by MPI hiring red seals	3%
* As a respondent may provide more than one response, the sum of percentages may add to more than 100%. Only those who provided a suggestion of what MPI could do to support their shop regarding the listed crucial aspects are included.	

Other crucial aspects for business in the upcoming years:

<u>Aspect</u>	<u>% indicated*</u>
Hourly labour rate needs to increase	25%
Administration costs should be increased / included	21%
Direct Repair eligibility should increase / pay for all estimating aspects under DR	15%
Fair partnership / better relationship with MPI	13%
Increase compensation (in general) to shops / hard to remain profitable	13%
Training of employees (cost, upgrades)	13%
Cost of equipment / materials	12%
Finding enough quality staff in industry / lack of succession planning	12%
Better / more consistent communication from MPI	8%
Increase paint & body rates	8%
Burdensome policies, procedures, requirements to be MPI accredited	6%
Need to invest in company growth / expansion (including for EVs)	6%
* As a respondent may provide more than one response, the sum of percentages may add to more than 100%. All respondents were asked for 'other critical aspects.'	

MPI strike-related changes

As a result of the MPI strike, were there any changes your shop would like to have remain in place?

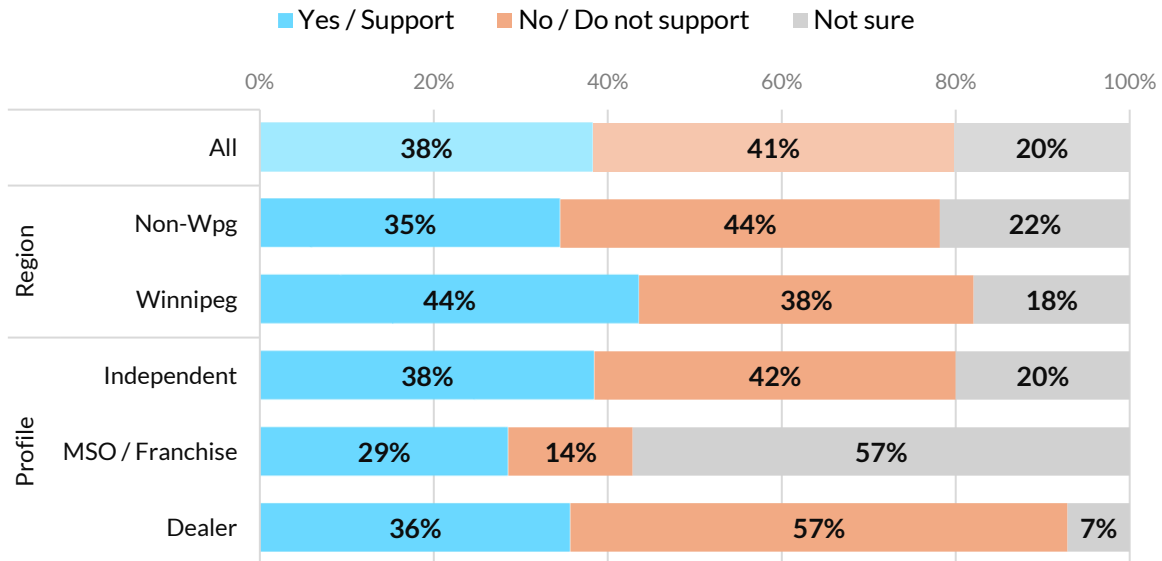


Changes that would like to see permanently remain in place due to the MPI strike:

Change	% indicated*
Higher Automatic Approval amounts	46%
Increase Direct Repair eligibility / have more DR claims / all claims should be DR eligible	32%
MPI quicker responses / less bureaucratic / faster decisions / there was less wait for MPI responses during strike	19%
Allow hail estimating at shops	11%
Increate rates / payments (in general)	8%
Allow tow-in estimates at shops	4%
* As a respondent may provide more than one response, the sum of percentages may add to more than 100%. Only those who indicated that changes as a result of the MPI strike were asked the question.	

Support for MPI:

Introducing the ability on Direct Repair estimates that involve your shop using Photo Based Estimating as an option for DR allowing shops to start the initial estimating process for schedule priority⁵



⁵ Not asked to glass only shops.

Compensation and Policies

Perceptions of fair rates for various aspects

Respondents were asked what they believe are fair hourly rates for both their shop and ratepayers. The following table details the count of respondents who indicated within each compensation dollar range, as well as the mean (average), median, minimum, and maximum amount indicated.

	Body ⁶	Refinish ⁷	Mechanical (Mitchell Operations) ⁸	Frame ⁹	Designated Rate ¹⁰	Paint Materials ¹¹	Shop Materials	Windshield Rate	Tempered Rate	If MPI moved to one rate for Glass	Admin Fee PD ¹²	Admin Fee Glass	NAGs Discount ¹³
Mean	\$106.9	\$107.1	\$131.6	\$127.2	\$128.3	\$65.8	\$11.1	\$92.6	\$100.7	\$97.7	\$88.9	\$37.0	11.1%
Median	\$101	\$103	\$125	\$125	\$130	\$65	\$10	\$90	\$97	\$95	\$50	\$30	10%
Minimum	\$80	\$80	\$98	\$90	\$25	\$42	\$6	\$60	\$60	\$70	\$20	\$0	0%
Maximum	\$150	\$150	\$170	\$190	\$200	\$86	\$20	\$150	\$150	\$150	\$750	\$250	50%
\$0												3	25
\$1 - \$9							27						1
\$10 - \$19							39					16	24
\$20 - \$29					1		3				8	20	20
\$30 - \$39					1						11	15	1
\$40 - \$49						1					1	3	
\$50 - \$59						9					18	12	1
\$60 - \$69						30		1	1		3		
\$70 - \$79						21		19	3	6	2	6	
\$80 - \$89	1	1				4		20	13	18	3	2	
\$90 - \$99	23	22	1	3				18	27	23			
\$100 - \$109	18	18	1	7	3			10	15	17	9	1	
\$110 - \$119	12	13	12	14	5			6	8	4	1		
\$120 - \$129	12	12	22	18	9			6	9	9	6	1	
\$130 - \$139	3	3	12	8	8			1	2	1			
\$140 - \$149	1	1	10	9	4			2	3	2			
\$150 - \$159	1	1	6	6	3			1	1	1	3		
\$160 - \$169			6	4	3								
\$170+			1	2	3						7	1	

⁶ Not asked to glass only shops.

⁷ Ibid.

⁸ Ibid.

⁹ Ibid.

¹⁰ Ibid.

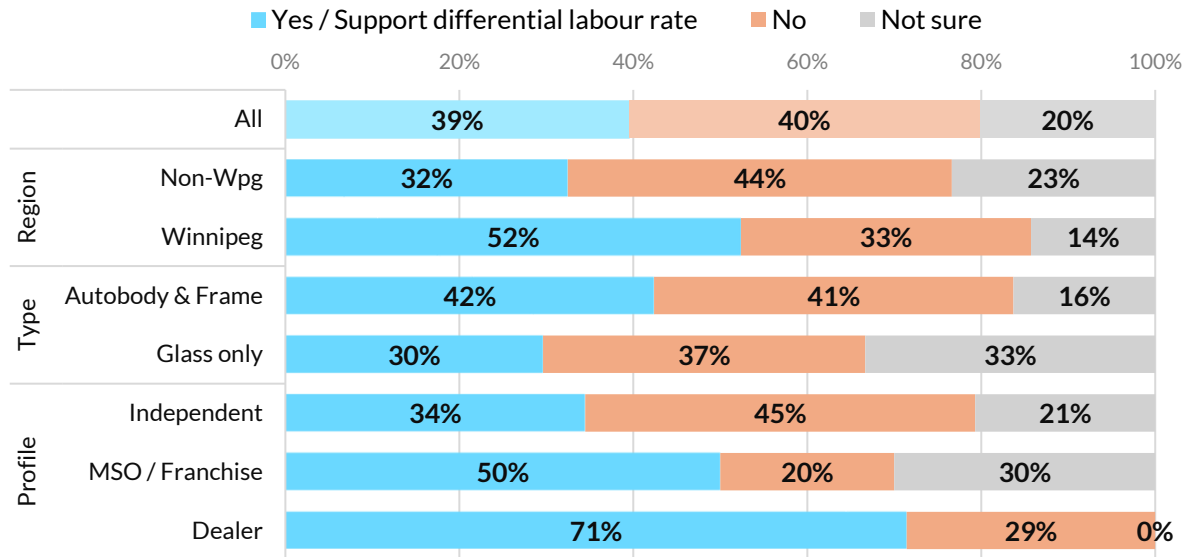
¹¹ Ibid.

¹² Ibid.

¹³ NAGs discount is a percentage, not a dollar amount. For NAGs discount, consider the ranges in the leftmost column as percentages rather than dollars.

Indication that MPI should consider:

Tier-based compensation such as a differential labour rate based on a repair facilities investment in tooling, training and repair capabilities



Suggested changes to policies, procedures, estimating standards, or parts rules

Are there any policies, procedures, estimating standards, or parts rules that MPI should change?

Please be as specific as possible.

<u>Suggested change</u>	<u>% indicated*</u>
Glass and ADAS claims not paying enough / only breaking even on glass / not worth doing glass claims	12%
Increase rates / keep up with inflation (in general)	12%
Realized Parts Savings amounts are too high / unrealistic / takes too much time to source	11%
Administrative rate should be increased	8%
Realized Parts Savings should be discontinued / scrapped	8%
MPI should work better with the repair shop partners / more collaborative with decision making / listen to shop's needs for policies and procedures	7%
Standards and procedures need more clarity / improved ease of understanding	7%
Tow-in vehicles are difficult claims / may sit in storage too long / later deemed unrepairable	7%
Autochex surveying skewed / too difficult to get positive results / scorecard results have too much weight	5%
I-CAR requirements too time consuming / too cumbersome	5%
Pay for small parts and supplies / better define what small parts are paid for (e.g., clips, rivets)	5%
Subcontracting should pay more / may have no choice bringing to specialty repair for certain aspects of a repair	5%
Auto approve more parts / increase auto approval amount	4%
Clean-up time should be added as a rate	4%
Direct Repair eligibility should be increased / more claim types should be DR	4%
Increase vehicle rental loss of use time / more than 30 days	4%
Inequity between Winnipeg and non-Winnipeg shops / rural shops at disadvantage (e.g., sourcing parts, longer deliveries)	4%
More information needed on sheets (including if claimant has loss of use, if betterment applies)	4%
MPI needs to better educate customers on policies and procedures (e.g., betterment, loss of use)	4%
Paint / tint / finish needs to be paid higher / needs to be included	4%
Frame damage work needs to be paid (e.g., measuring, gauging)	3%
Photo based estimating are difficult claims / customers submit poor photos	3%
Theft and theft recovery challenges (MPI estimator should be involved, rates not covering enough of the job)	3%
* As a respondent may provide more than one response, the sum of percentages may add to more than 100%. Responses coded if more than one mention.	

Crucial aspects for agreement

Respondents were presented a list of methods of aspects that may be crucial for their business in the upcoming agreement, and were asked to rank the aspects from most to least crucial using a numeric “1” for their top ‘number one’ aspect, “2” for the second most crucial aspect, and so on.

The following table is sorted with the top indicated aspect at the top, and the least crucial at the bottom. The results are the mean ranking provided, as such the lower the mean rank the more common method (i.e., the closer it is to “#1”).

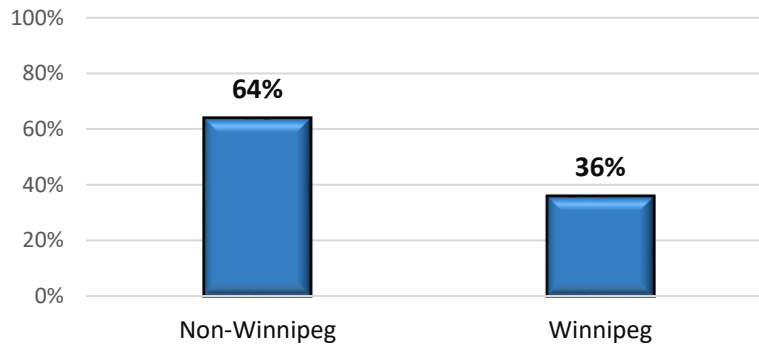
Ranking of crucial aspects for business in upcoming agreement, mean scores of ranking (sorted most to least crucial):

Aspect	All	Non- Wpg	Wpg	Autobody & frame	Glass only	Indep.	MSO	Dealer
Increase Blend Time Allowance	3.6	3.5	3.7	3.1	8.5	3.4	4.6	3.6
Increase Total Loss Teardown (per Claim)	3.7	3.6	3.9	3.7	4.3	3.7	4.1	2.8
Increase ADAS Calibration allowance	4.0	4.2	3.6	4.5	1.6	4.0	2.0	5.0
Increase Total Theft Procedures (per Claim)	4.7	4.2	5.5	4.7	4.8	4.6	5.4	4.4
Car Detailing (per Claim)	4.8	4.9	4.7	4.9	4.3	5.0	5.4	3.5
Allow Sublet Markups (per Claim)	4.8	4.8	4.8	4.8	4.8	4.7	4.1	6.4
Allow Sublet Tows (per Claim)	6.0	6.0	5.9	6.1	5.3	6.1	5.7	6.5
Total Theft Remediation (per Claim)	6.3	5.9	6.9	6.3	6.6	6.0	7.1	6.5
Luxury Body Rate (per Hour)	7.8	8.1	7.5	8.0	5.9	8.0	7.9	7.6
Increase MPI’s Glass Tint allowances	7.9	7.9	7.8	8.6	3.9	7.8	7.8	8.7

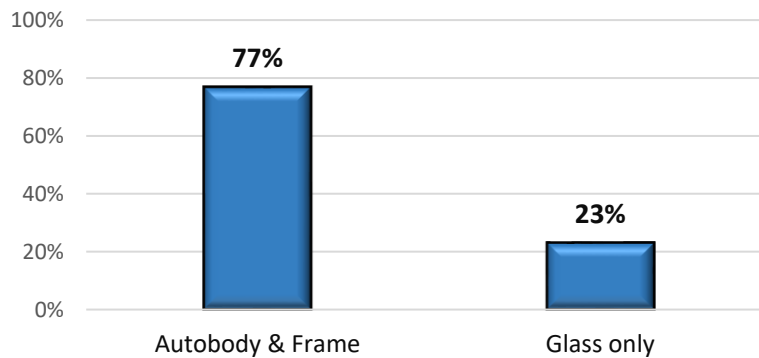
Appendix: Shop Attributes

Note: results in this appendix pertain only to shops that responded to the survey, and does not reflect all Manitoba shops.

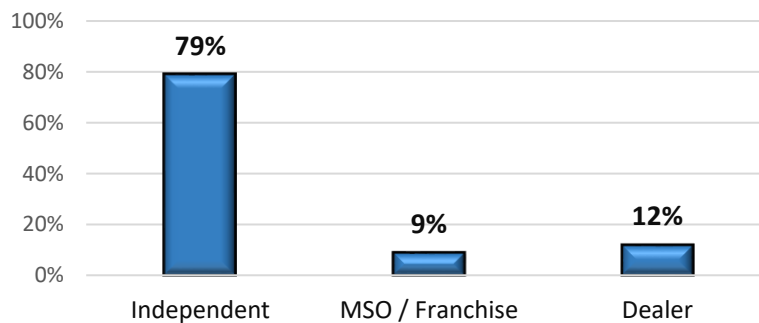
Region¹⁴:



Shop Type:

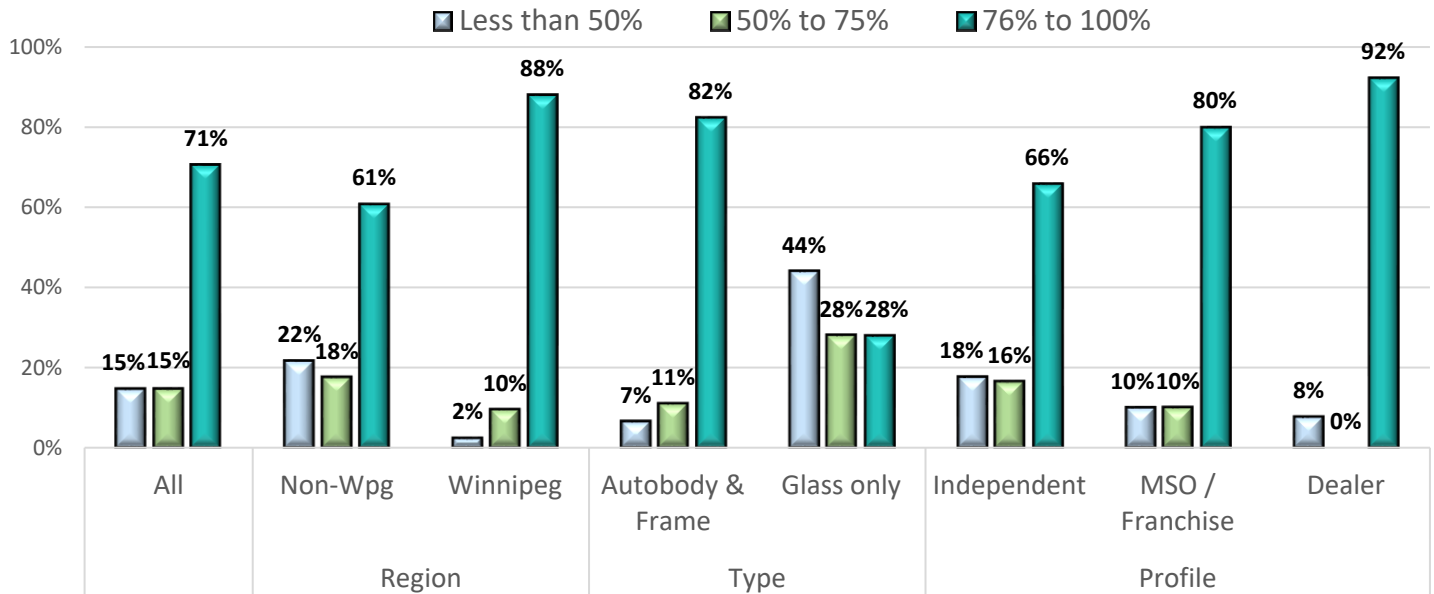


Shop Profile:



¹⁴ The Winnipeg region includes communities directly bordering the city (e.g., Headingley, East and West St. Paul).

Percentage of total shop workload is on MPI claims repairs:



Provincial associations shop has membership in:

