

Notice to all Accredited Collision and Glass Registered Account Holders

Manitoba Light Vehicle Repair Industry Survey Results

Date published: September 18, 2020

In July 2020, 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 417 invitations to all accredited collision and glass registered account holders. Each individual location received a maximum of one invitation.

- 91 completed surveys were returned, for a completion rate of 22%.
- Among the completed surveys, 56 were from non-Winnipeg regions.
- 35 completed surveys were from the Winnipeg region.
- 70 completed surveys were from autobody and glass shops.
- 21 completed surveys were from glass-only shops.
- 69 completed surveys were from shops that self-identified as being independently owned.
- 18 completed surveys were from franchised or dealer-owned shops.
- Four completed surveys were from shops that chose not to identify ownership.

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.

Manitoba Light Vehicle Repair Industry Survey Results July, 2020

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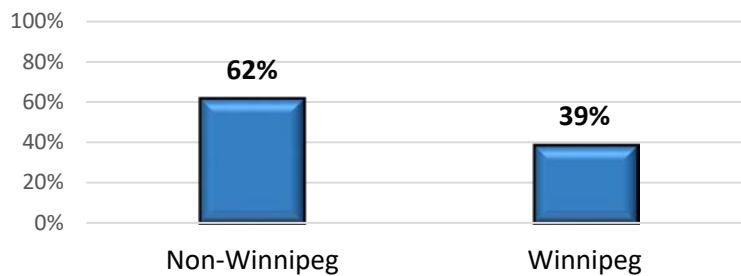
Research and Report Notes

- 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 considered to be *satisfied* or *positively agree* with a statement). This ‘top box’ of 6 and 7 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.** In some instances, ‘yes/no’ questions were asked and the percentage indicated in charts is the percentage who provided a “yes” response to the question.
- 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 of shop types within charts due to smaller sample sizes when compared to the overall result of all respondents.
- 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 39% of all respondents, the actual volume of repairs in the Winnipeg region may be a larger or smaller proportion than 39% of all repairs province-wide.
- The Winnipeg region consists of Winnipeg and the communities that directly border the city (e.g., Headingley, East and West St. Paul).

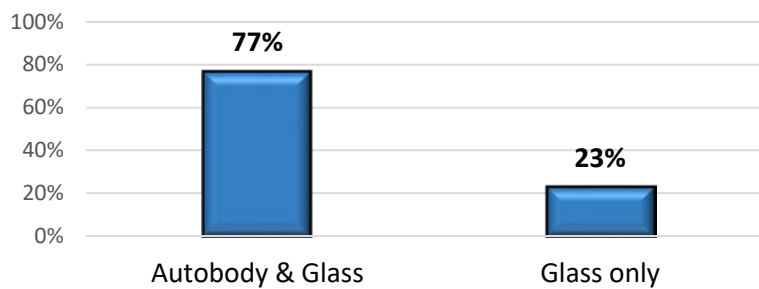
Respondent/Shop Attributes

Note: results in this section detail the profile of those who responded to the survey, and does not reflect all Manitoba shops.

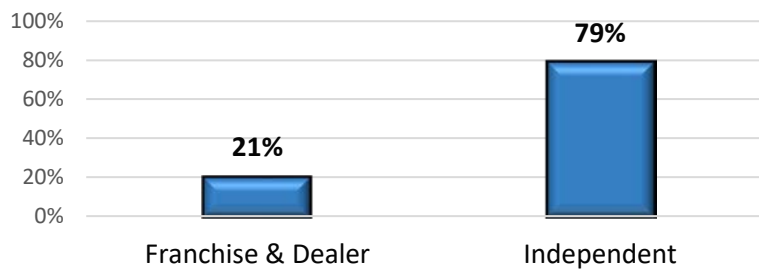
Region¹:



Shop Type:

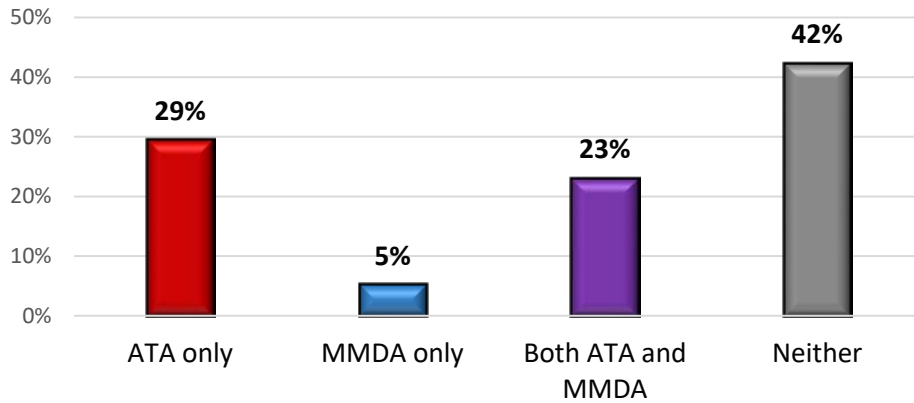


Shop Profile:

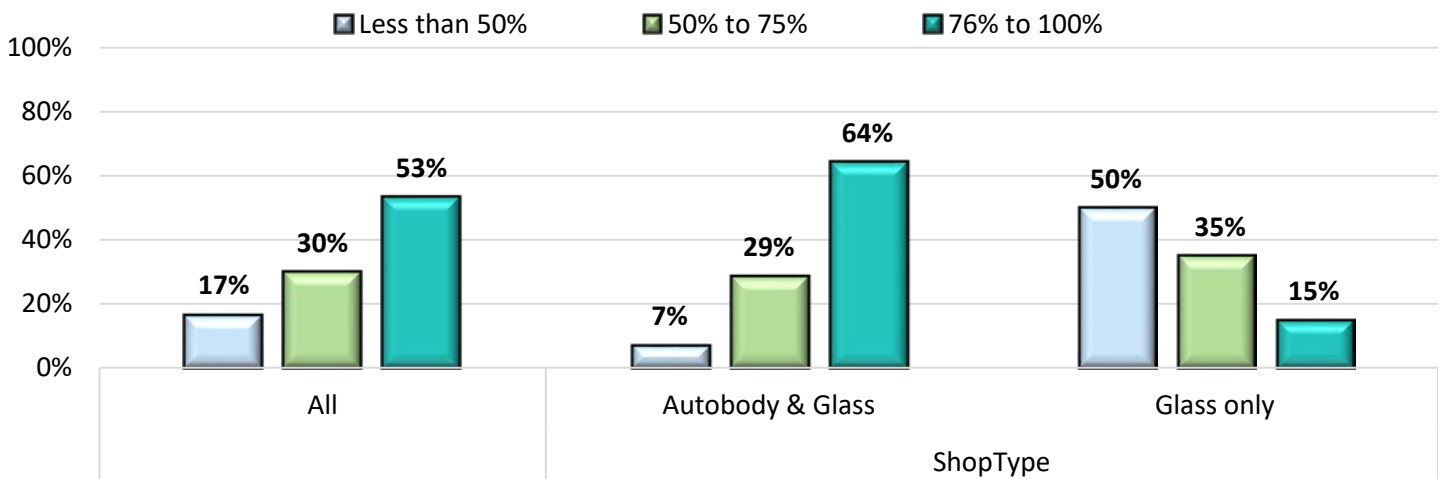


¹ The Winnipeg region includes communities within the Perimeter Highway and directly bordering the city (e.g., Headingley, East and West St. Paul).

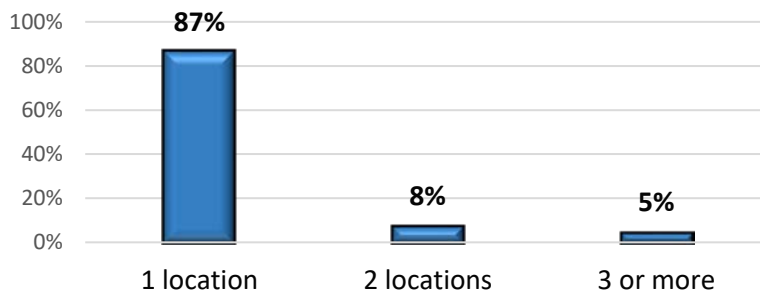
Provincial associations shop has membership in:



Percentage of total shop workload is on MPI claims repairs:

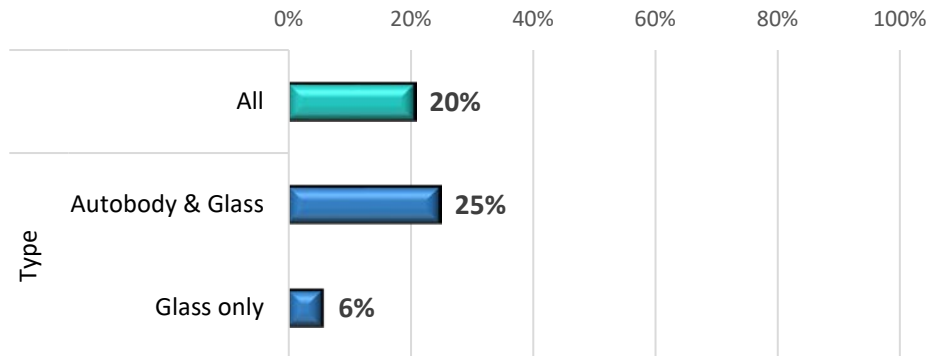


Number of locations that company owns:

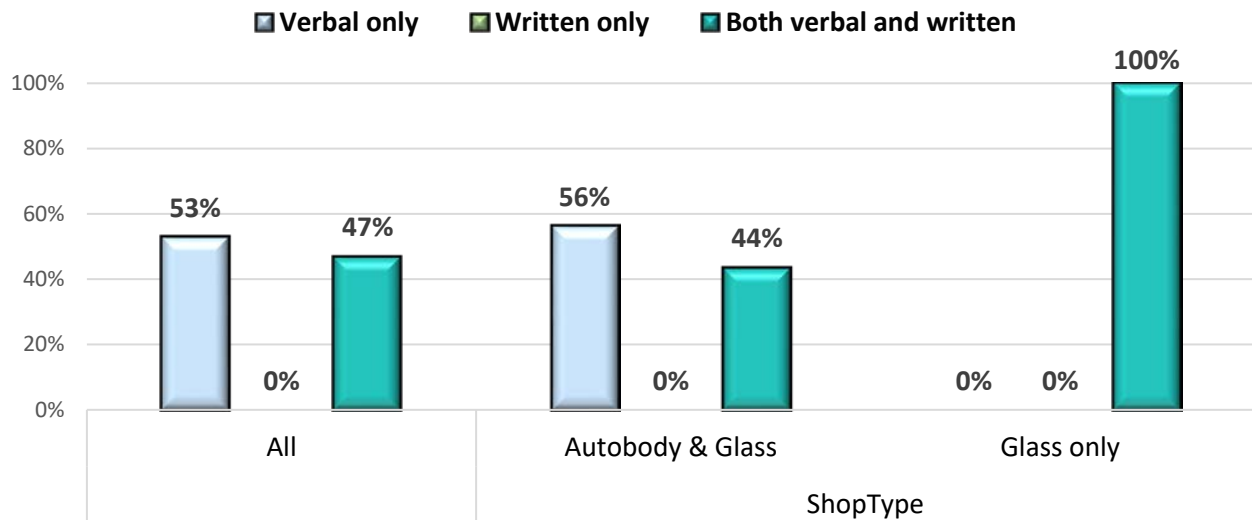




Indication that shop provides French language services (% yes):



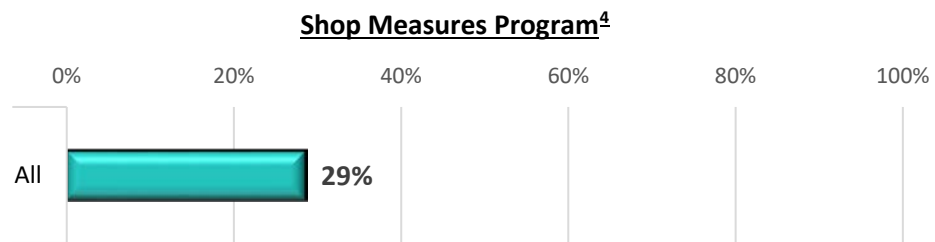
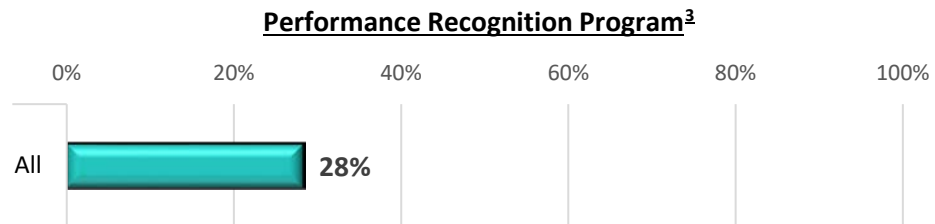
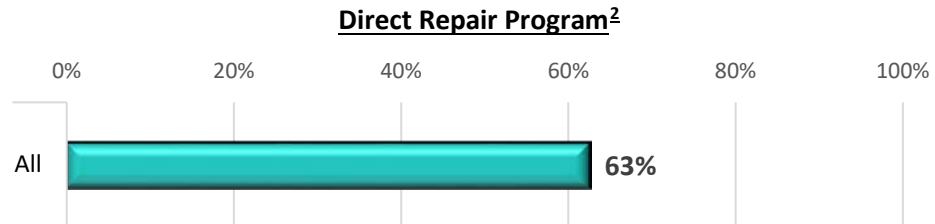
Format of French language services offered (shops that provide French services only):



Impressions Regarding Manitoba Public Insurance

Programs and Services

Satisfaction with the (% satisfied / 6 & 7 out of 7):



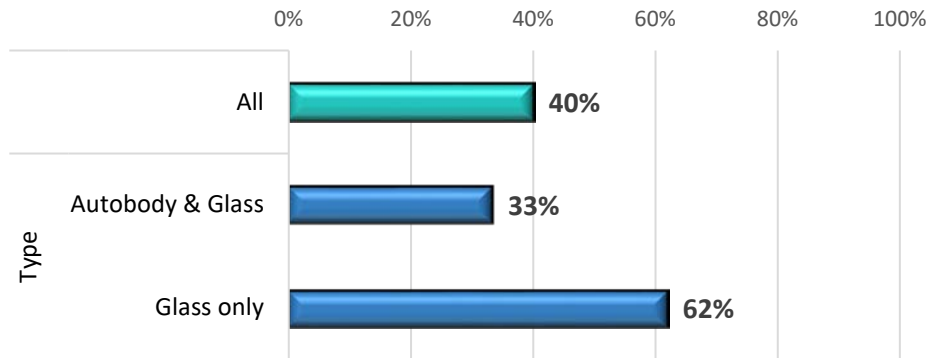
² Not asked to glass only shops.

³ Ibid.

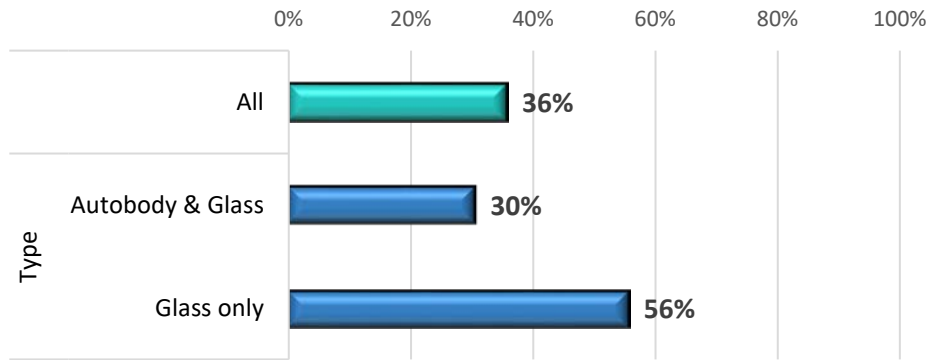
⁴ Ibid.



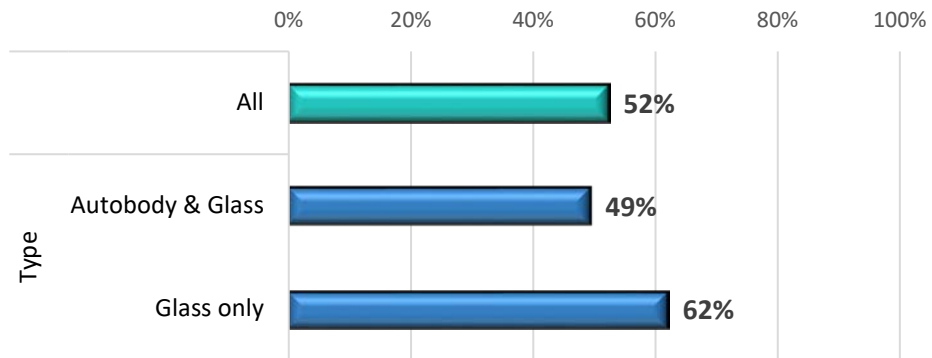
Ease of doing business with MPI



Feedback and guidance received from MPI

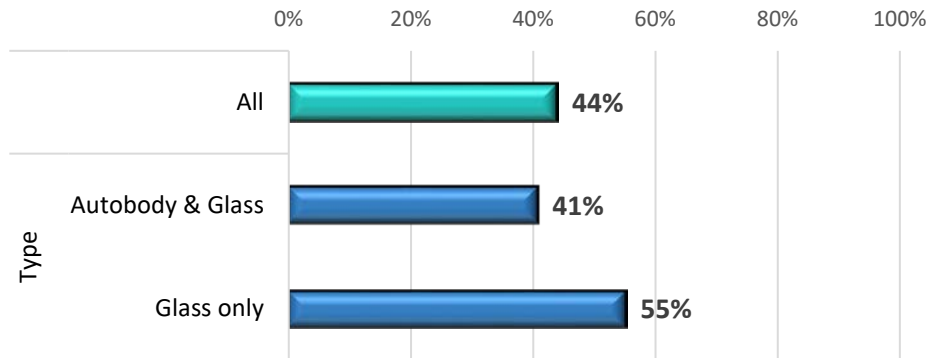


Effectiveness of software and online services

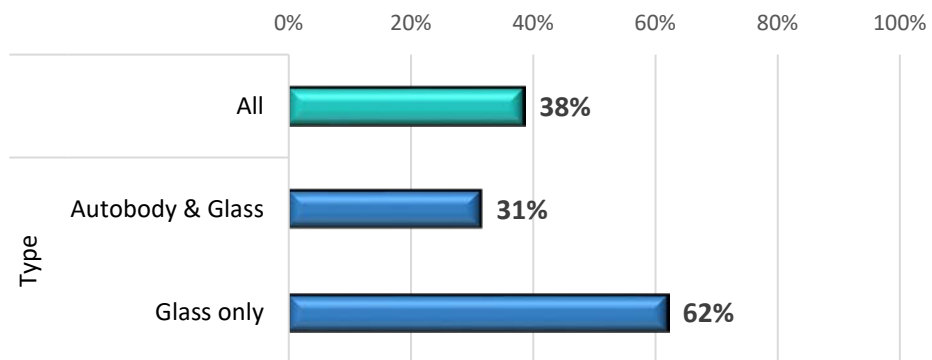




Amount of communications received from MPI

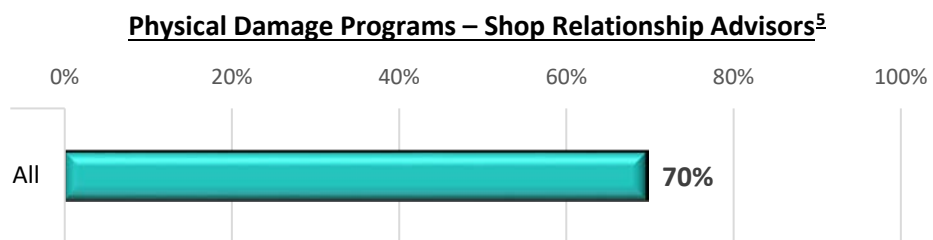
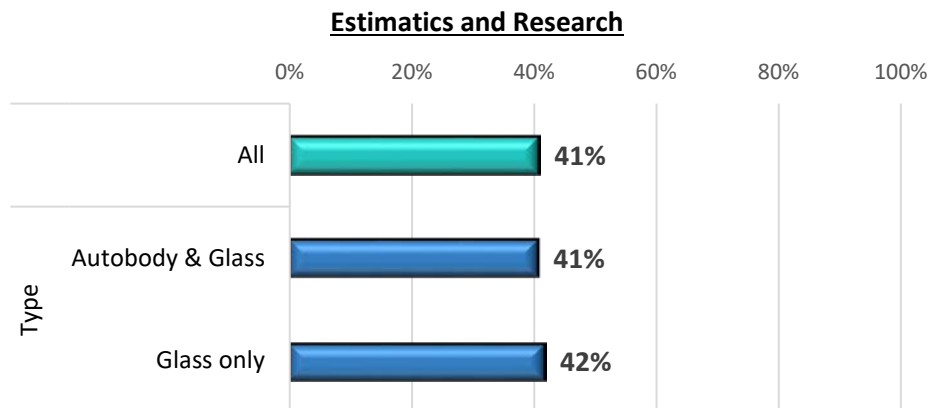
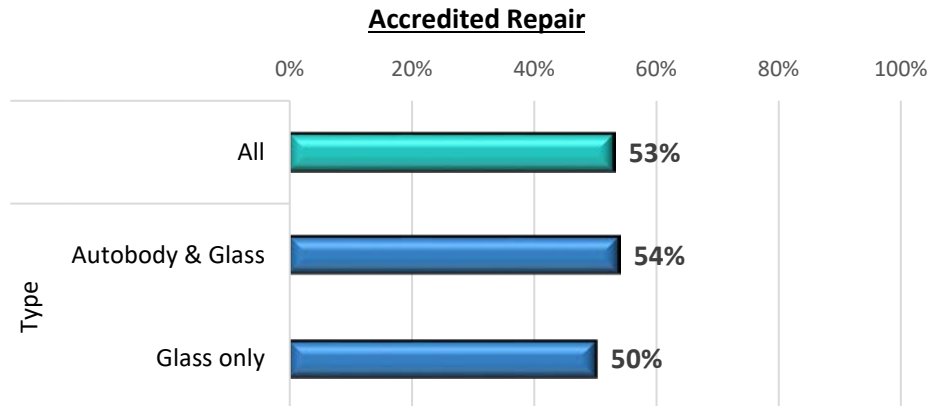


Overall level of service received from MPI



Feedback received from MPI

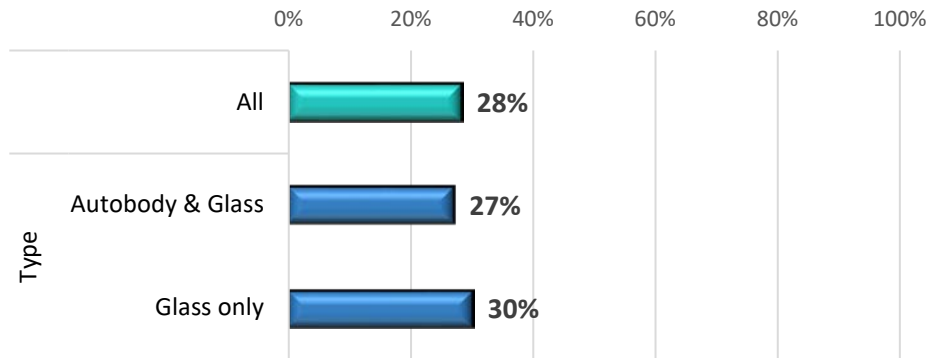
Satisfaction with the guidance and information received regarding the accuracy, completeness, and timing of feedback from MPI pertaining to (% satisfied / 6 & 7 out of 7):



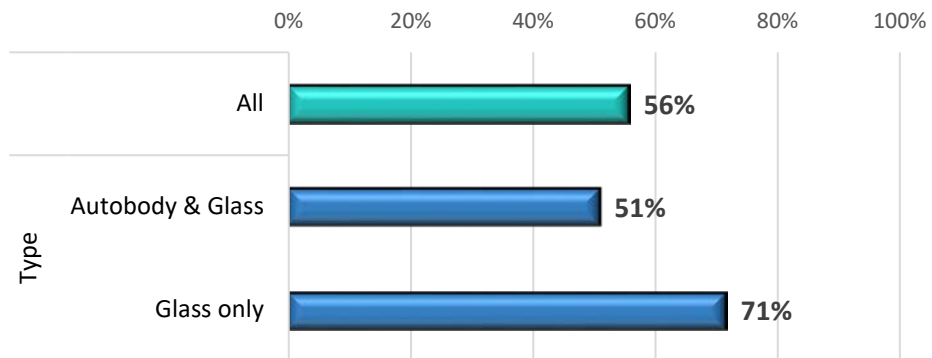
⁵ Not asked to glass only shops.



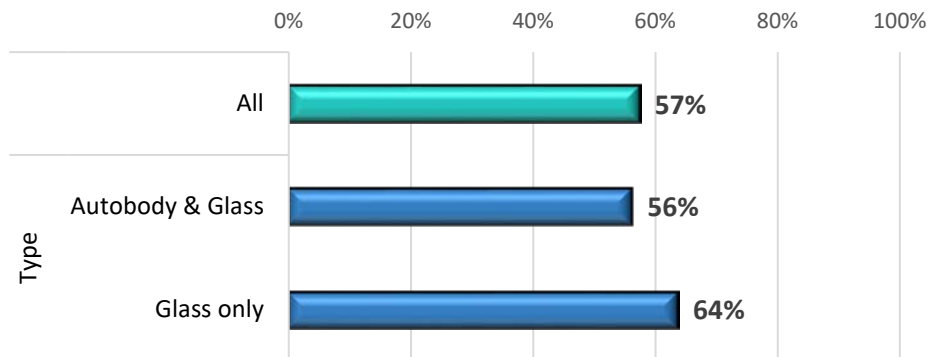
Physical Damage Programs – Audit Unit



Physical Damage Programs – Glass Unit

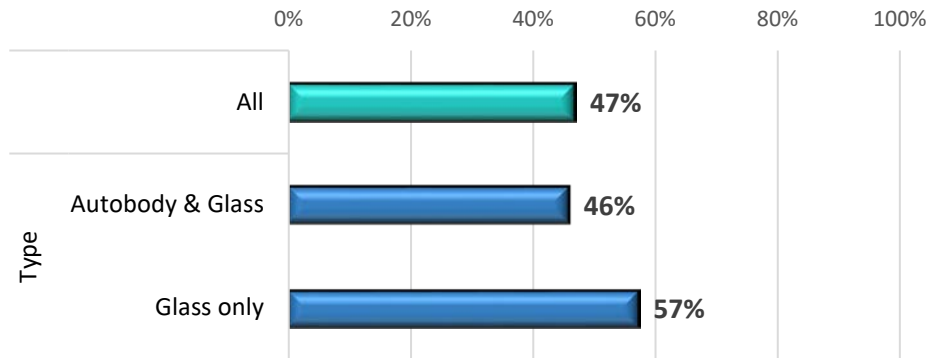


Vehicle Safety

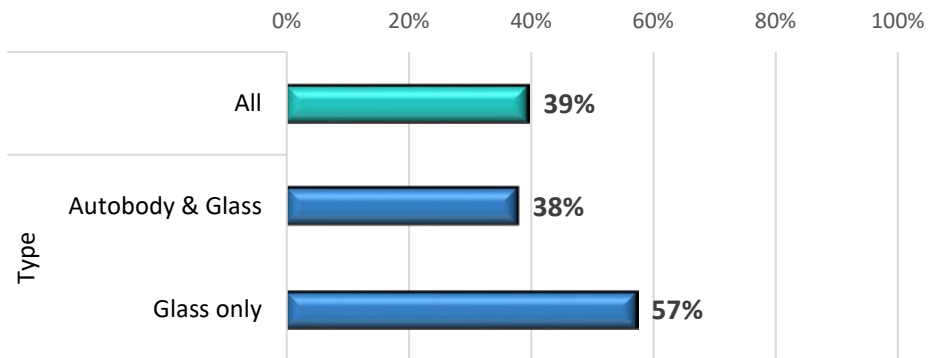




Estimating



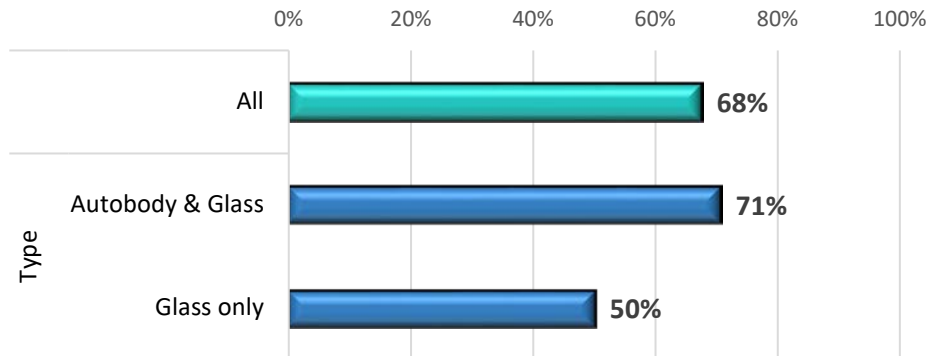
Adjusting



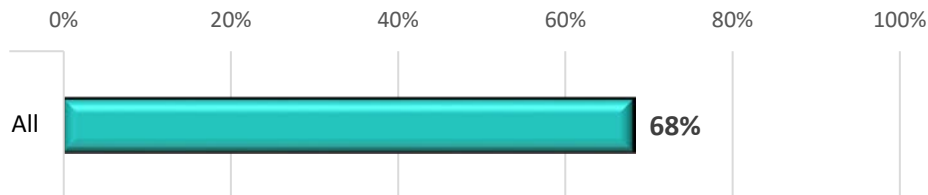
MPI Requirements

Satisfaction with the following aspects of MPI's requirements, policies, and software
(% satisfied / 6 & 7 out of 7):

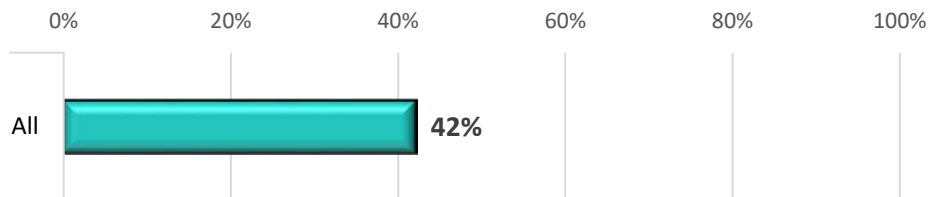
Mitchell Software technical support quality by TAC



The Mitchell RC Connect software⁶



Repair accuracy visits performed by Accredited Repair⁷

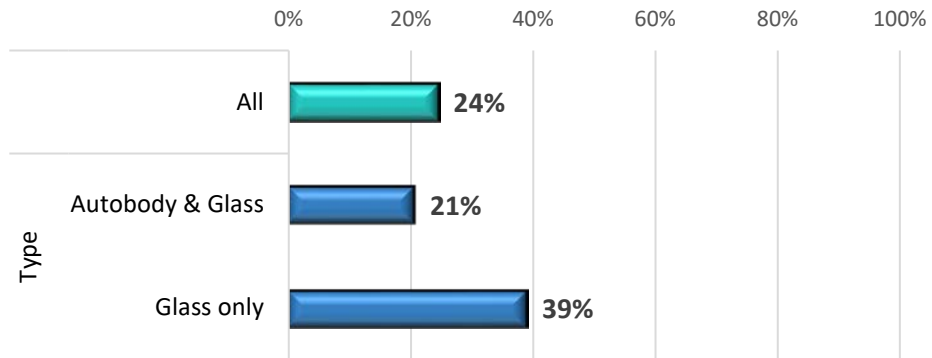


⁶ Not asked to glass only shops.

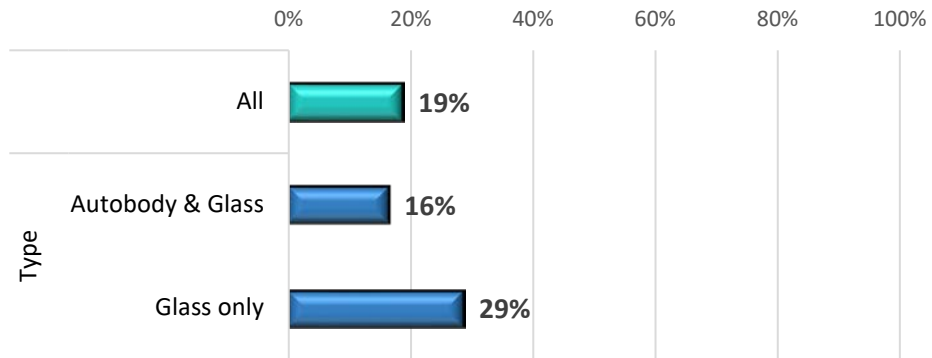
⁷ Ibid.



MPI's training requirements



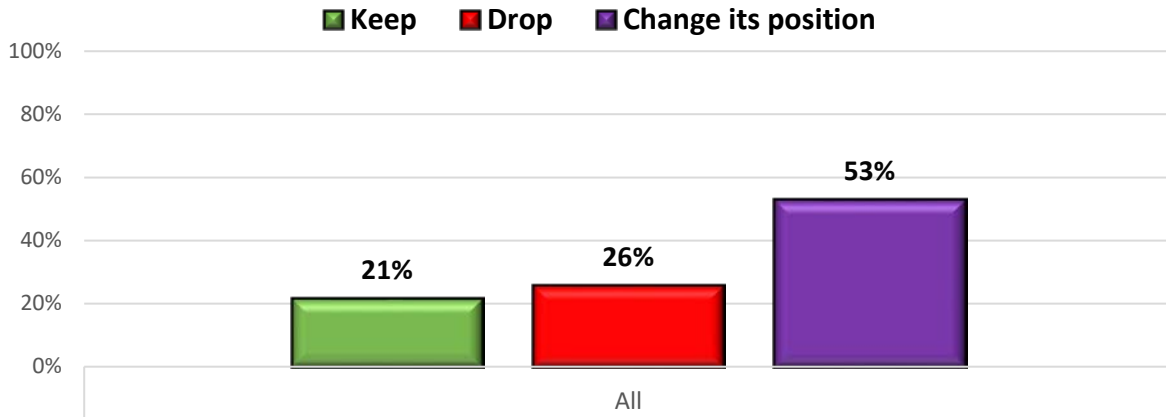
MPI's advertising policies





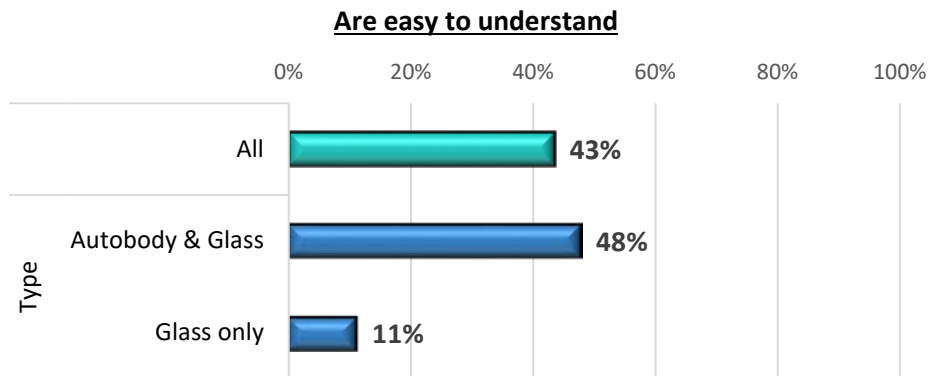
I-CAR Gold Class Requirement⁸

Indication if MPI should keep, drop, or change its I-CAR Gold Class requirement:



Estimating Standards

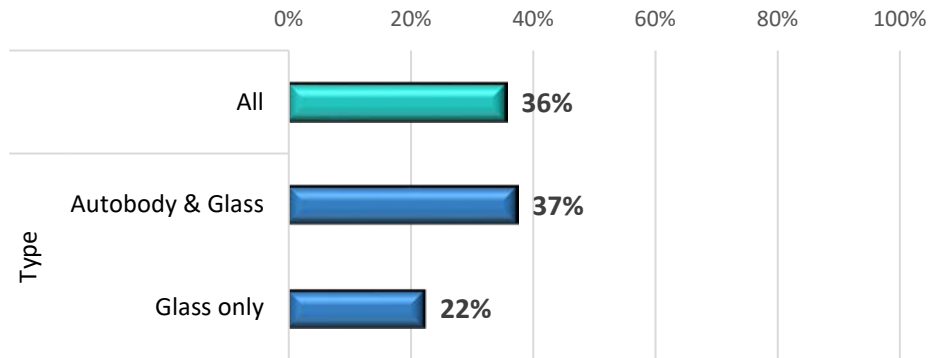
Agreement that MPI's Estimating Standards (% agree / 6 & 7 out of 7):



⁸ Not asked to glass only shops.



Thoroughly covers all aspects required



Estimating Standards for priority to review

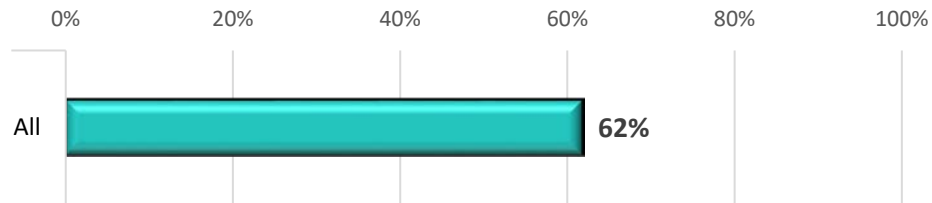
Percentage of respondents who selected the following Estimating Standards as being in need of review⁹:

Estimating Standard (category: standard)	% Selected
Labour Rates: Labour Rates - Southern and Northern	69%
Paint Materials	43%
Payments: Administration Fee	38%
Shop Materials	34%
Glass: Glass Clean Up Time	25%
Glass: Glass Replacement Pricing	25%
Total Loss: Marginal Repairs and Price Outs	23%
Total Loss: Tear Downs	22%
Refinish: Zone Refinish	21%
Documentation: Unfit Vehicles	18%
Documentation: Overlapping Claims	17%
Parts Under \$10	16%
Body: Pre and Post Repair Diagnostic Scanning	15%
Documentation: Unrelated Damage	14%
Payments: Customer Tax Responsibility	14%
Documentation: Owner to Authorize	13%
Documentation: Sublet Repairs	13%
Documentation: Supplements	13%
Mechanical: Advanced Driver Assistance Systems (ADAS) Calibration	13%
Mechanical: Designated Repair Eligible Operations	13%
Claim Type Definition: Glass Claims	10%

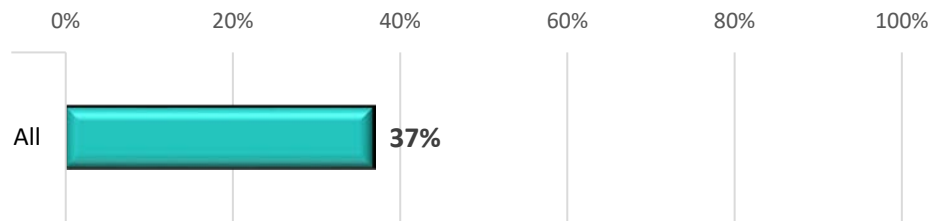
⁹ Respondents selected up to five Estimating Standards they indicated a need to be reviewed. As the list of Standards is extensive (i.e., 116 Standards) only those standards that at least 10% of respondents selected are included in the table.

Parts Autonomy Project¹⁰

Awareness of the Parts Autonomy Project (% yes):



Indication the Parts Autonomy Project will be valuable (% valuable / 6 & 7 out of 7):



¹⁰ Not asked to glass only shops.

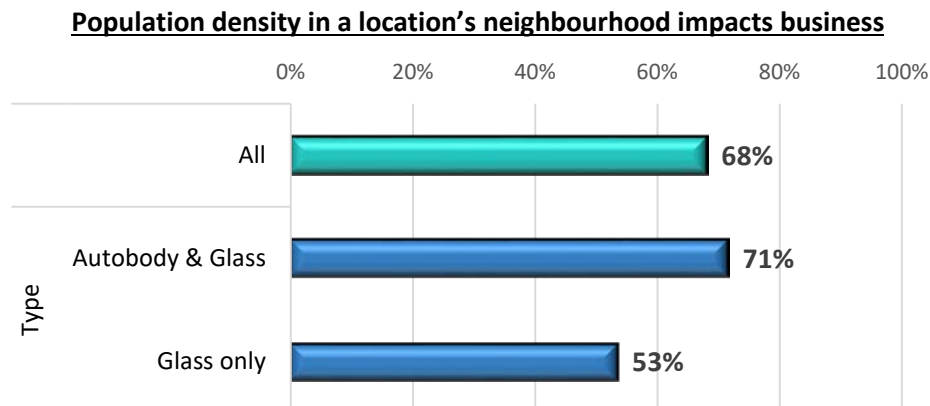
Sustainability and Future Outlook

Upcoming crucial aspects for business

Ranking of crucial aspects for business in upcoming years, mean scores of ranking (sorted most to least critical)¹¹:

Aspect	Mean score
Repair information availability	3.4
Finding qualified employees in any role	3.3
Retaining employees	3.1
Training (e.g., availability and quality of instruction)	2.8
Quality Assurance programs	2.5

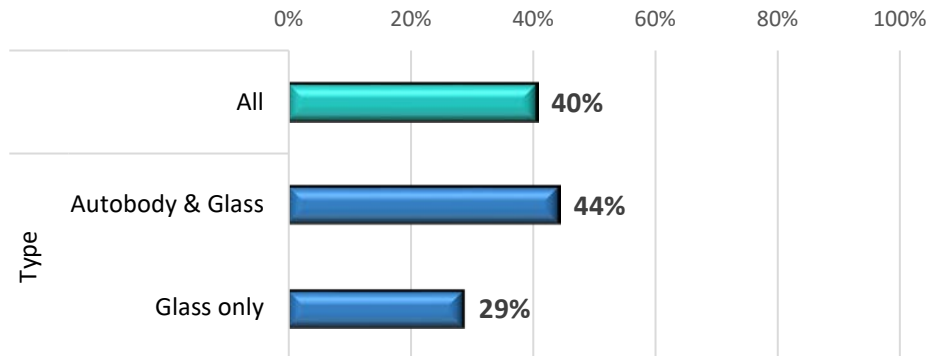
Indication that (% yes):



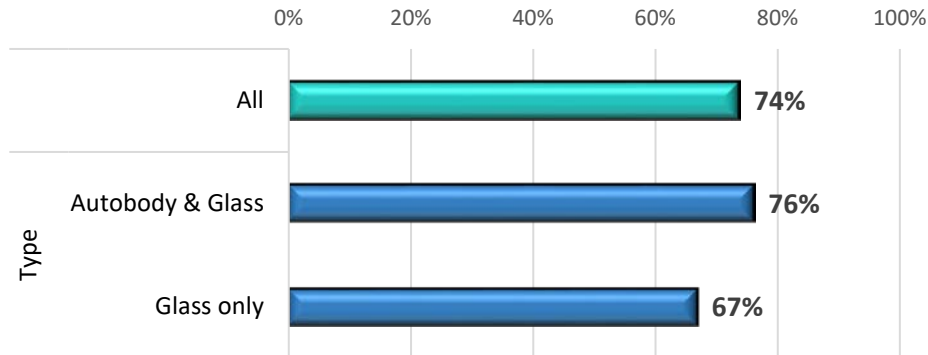
¹¹ Respondents ranked the five aspects, with a weight of 5 for their *most crucial* selection and a weight of 1 for the *least crucial* aspect. Due to smaller sample sizes regarding each ranking, results displayed only for all respondents combined.



Their shop provides interactive online services (e.g., scheduling, payments, appointment reminders)

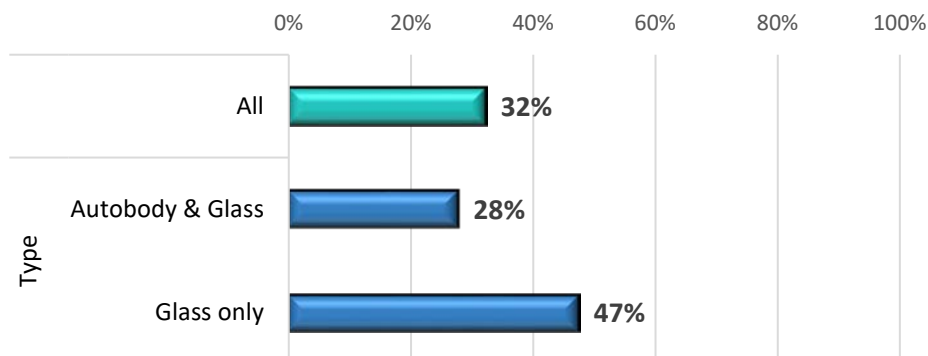


As a result of COVID-19, some or all changes will remain in place permanently at their shop



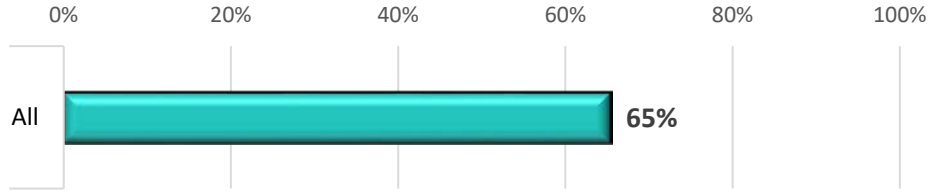
Support for MPI:

**Sharing more information about your shop online for customers
(e.g., repair capabilities, customer service ratings, training received) (% support / 6 & 7 out of 7):**



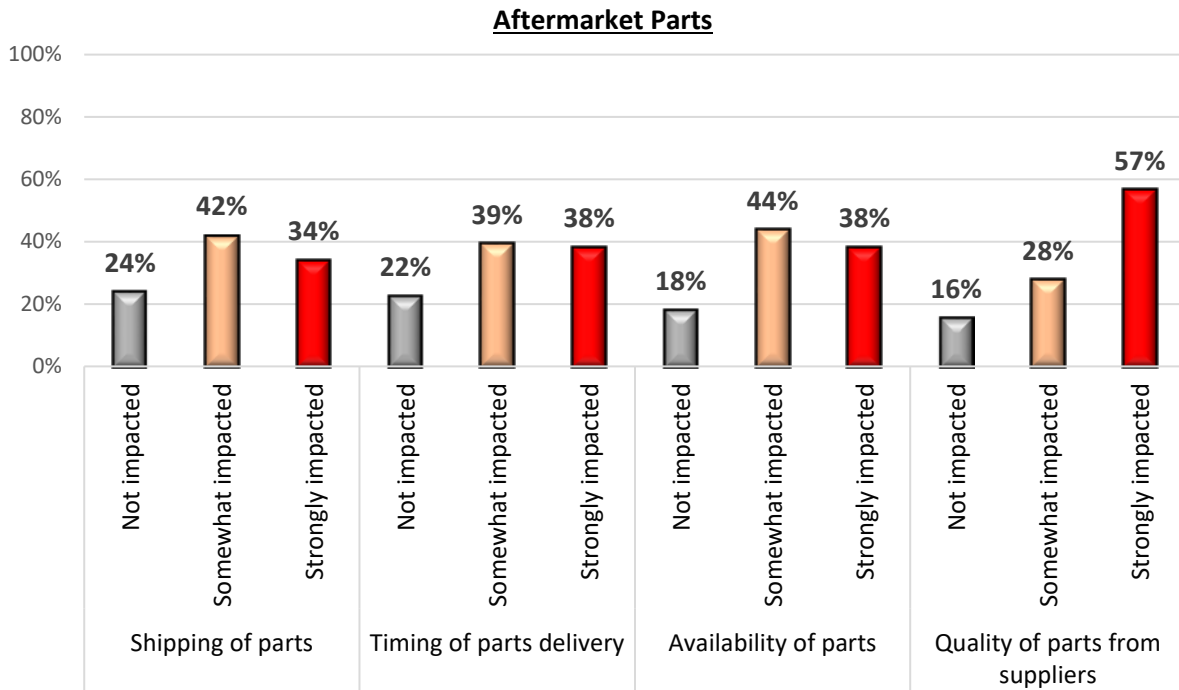


Introducing photo-based estimating as an option (% yes)¹²



Impact on business related to aspects involving parts

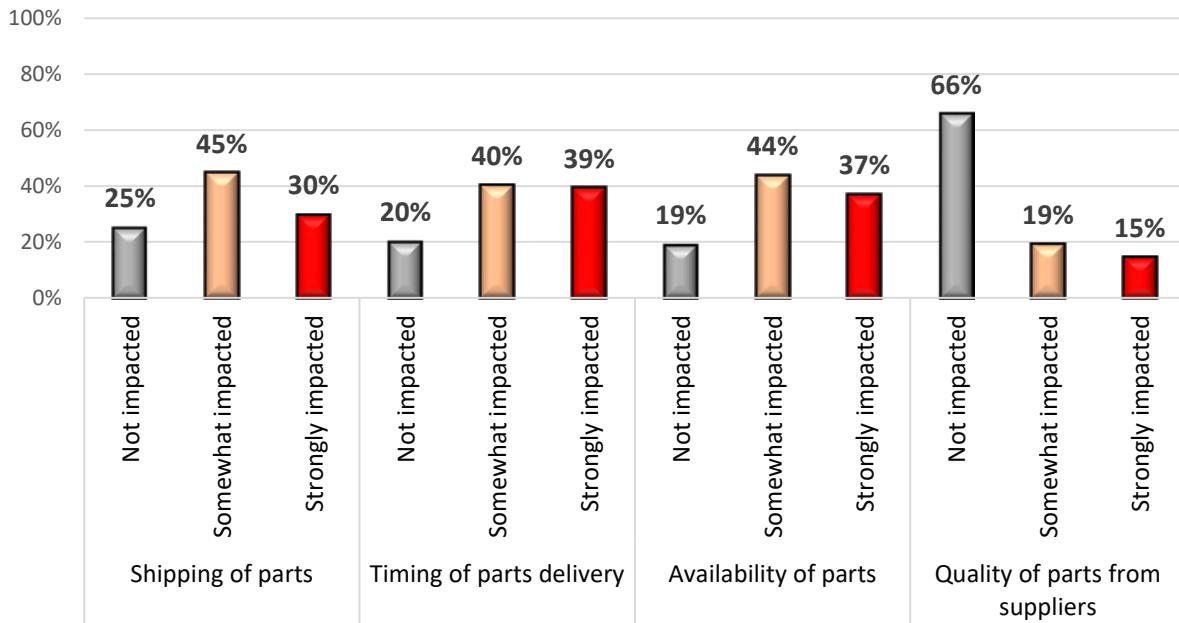
Level of negative impact the following aspects can have on completing repairs to customers' vehicles:



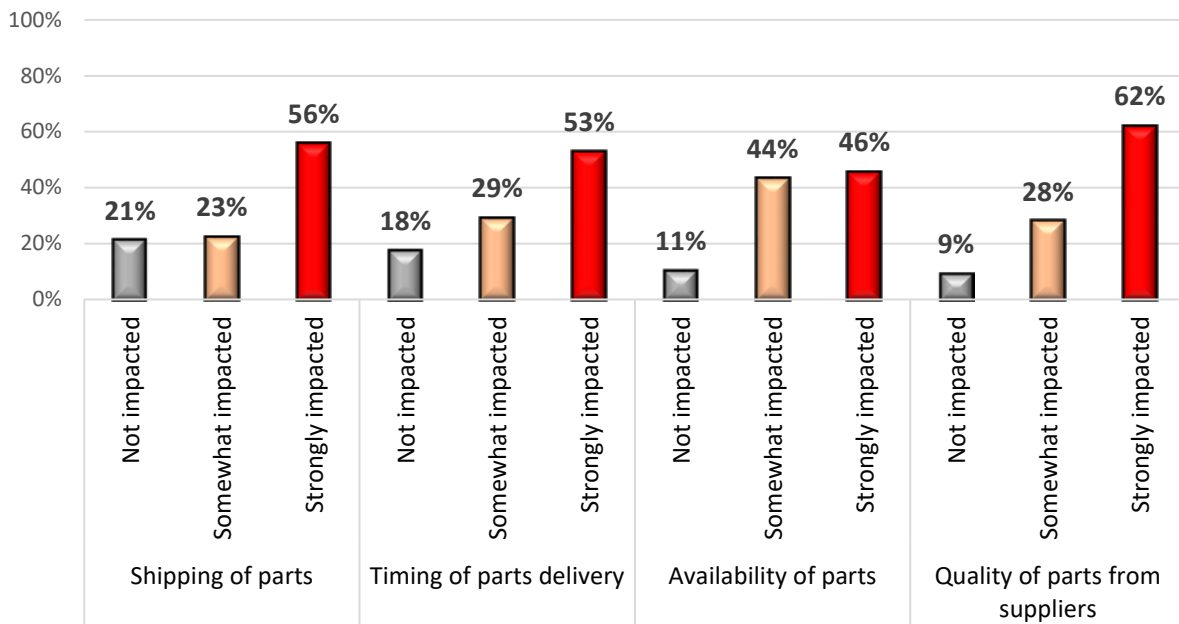
¹² Not asked to glass only shops.



OEM Parts



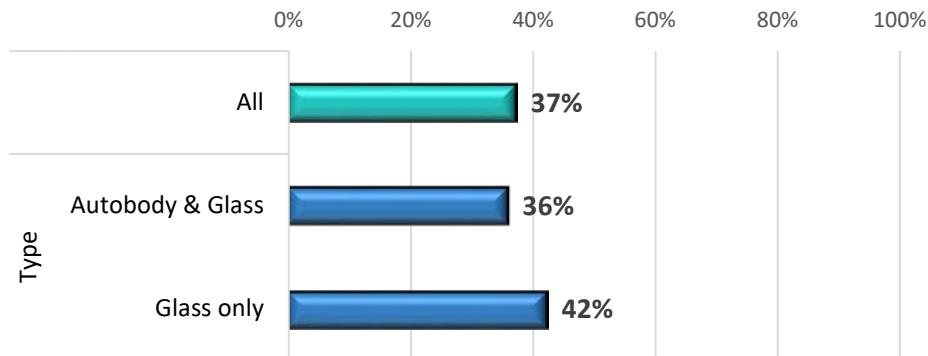
Recycled Parts



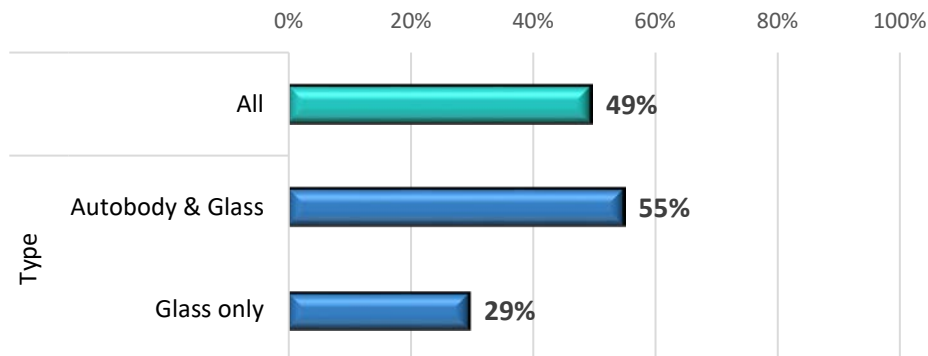
Training and Support from Other Partners and Organizations

Indication the following sources of information are valuable (% valuable / 6 & 7 out of 7):

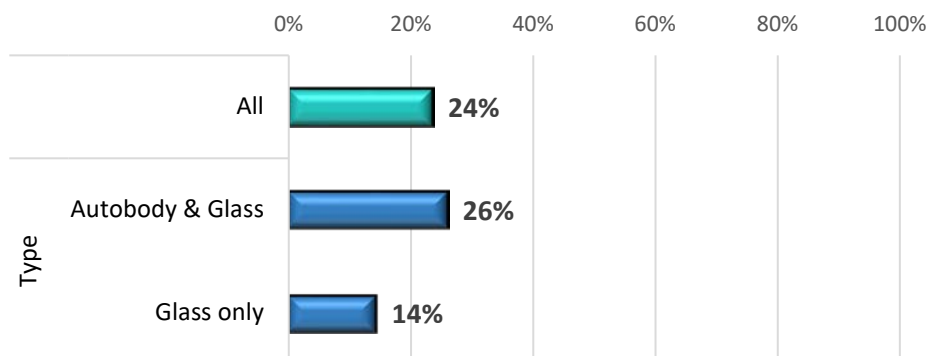
Training providers (e.g. I-CAR or other)



Industry affiliations (e.g., ATA, MMDA, CCIF, etc.)



Certification programs (e.g., CCC, Verfax, etc.)



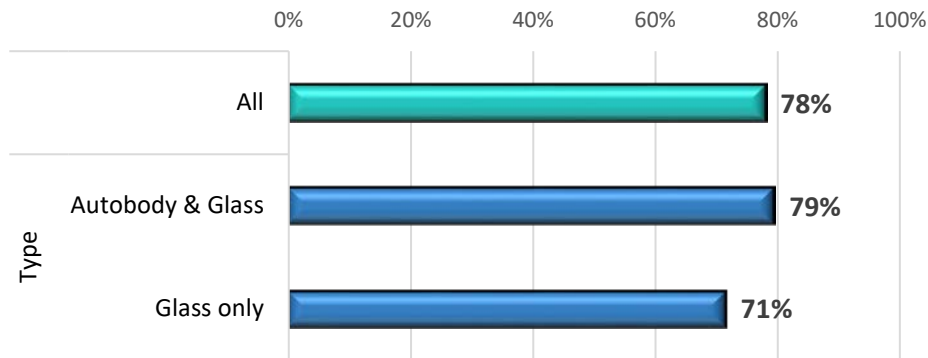
Compensation

Proposed amounts that would be a fair hourly rate for both shops and MPI's ratepayers:

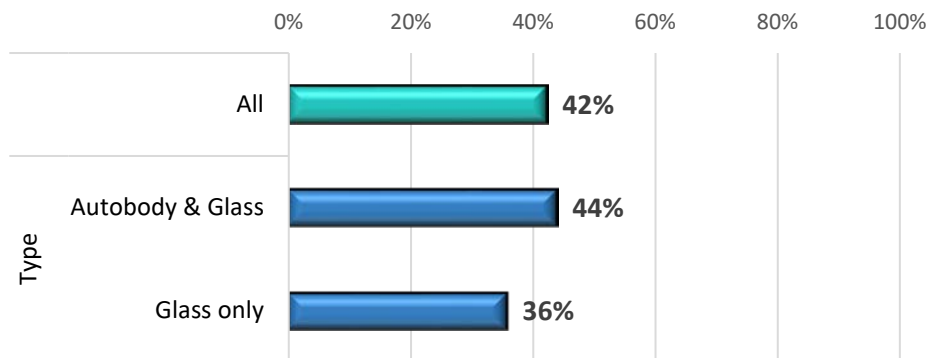
A majority indicated there should be an increase in all types of compensation paid by Manitoba Public Insurance.

Indication that there should be a (% yes):

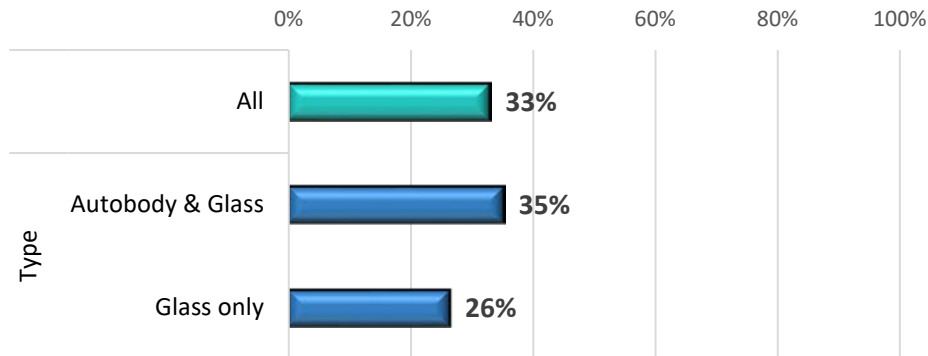
Differential labour rate based on tooling, training, and repair capabilities



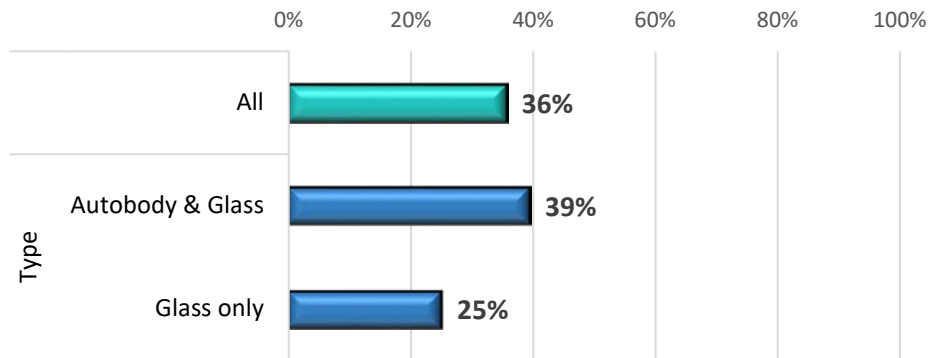
Differential labour rate based on individual shop performance measures



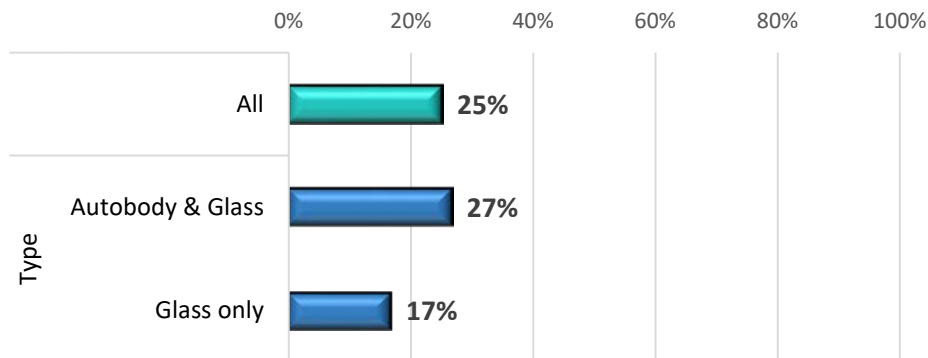
Indication that policies regarding lowest cost glass are effective:



Support for dropping lowest cost glass and having a higher NAGS discount¹³



Agreement that current policies on loss of use are acceptable (% agree / 6 & 7 out of 7):



¹³ Pertains only to those who earlier responded that policies regarding lowest cost glass are *not effective*.