

# SNAPSHOT

## OF THE COLLISION REPAIR INDUSTRY

COLLISION REPAIR EDUCATION  
**FOUNDATION**  
I-CAR

Co-sponsored by **I-CAR**

## EXECUTIVE SUMMARY OF THE 2019 SURVEY

### BACKGROUND

Previous surveys, conducted every three years, confirmed the need for a continual supply of qualified entry-level technicians, while also showing changes concerning business operations and the collision repair technician workforce.

A similar survey was completed in 2019 to continue monitoring trends and provide data to support effective strategies and decision-making on the structure and scope of collision repair school programs at all levels.

### SAMPLE

An online survey was set up to collect information about both the business environment and the technician workforce. Announcements were made in leading publications, on appropriate websites, and to repair associations inviting collision repair businesses to complete the survey.

Over 675 collision repair businesses responded, representing over 4,500 technicians. The respondents provided a wealth of data.

The same electronic survey system was used for direct analysis with the 2016 Survey and provided a few interesting comparisons to prior-year surveys. Complete data history is available in the full report.

### BUSINESS STATISTICS

While the total number of collision repair businesses increased slightly (1.6%), the number of technicians has increased significantly (5.2%).

The percentage of small shops (with annual sales under \$300,000) has steadily declined since 1995, while the share of large shops (over \$1 million) continues to increase.

The overall average for square feet of production space has again grown, along with a higher average number of technicians and support employees reported. In 1995, one in five shops reported more than six technicians. In 2019, it is more than one out of every two shops (57.5%).

Those in business five years or less has decreased from 1995 (14.2%) to 2019 (3.7%), contributing to an increase in the overall average of number of years in business.

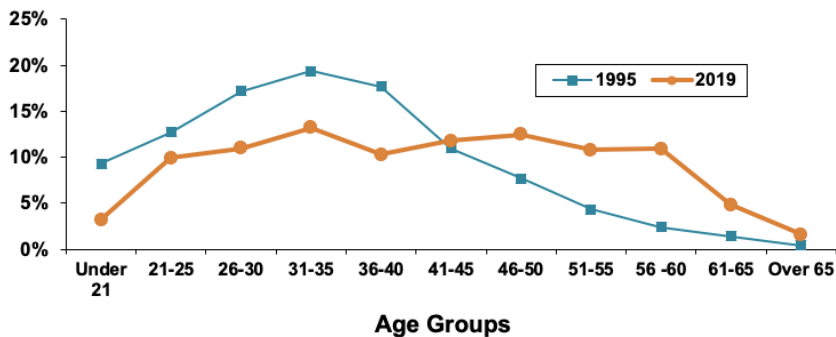
### Business Statistics - Collision Repair Shops

SURVEY YEAR	1995	2001	2007	2013	2016	2019
Number of Businesses*	45,882	44,532	43,535	40,129	40,193	40,849
Number of Technicians*		178,400	179,000	176,200	187,800	197,500
Years in Business	17.3	21.6	27.5	29.5	32.2	33.9
Average Square Feet	5,761	8,269	10,034	13,524	13,843	15,114
Average # Techs and Support	4.9	6.3	7.0	11.1	12.7	13.1
More than 6 Technicians	20.4%	29.7%	32.6%	55.9%	52.3%	57.5%
Percent of Small Shops	44.3%	28.0%	14.3%	8.7%	5.3%	4.6%
Percent of Medium Shops	40.4%	45.9%	48.6%	24.8%	26.6%	25.4%
Percent of Large Shops	15.3%	26.1%	37.1%	66.5%	68.1%	70.0%

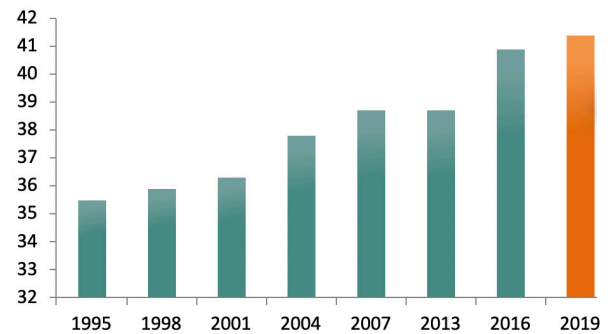
\* U.S. Bureau of Labor Statistics, courtesy of CollisionWeek

This survey was conducted by the Collision Repair Education Foundation.

## Age Groups – Collision Repair Technicians



## Average Age



## CURRENT TECHNICIANS

Average technician age has again increased and is now over 41 years old, rising about 17 percent since 1995. A particular concern for this industry is the lack of growth in the percentage of technicians over 50 years old.

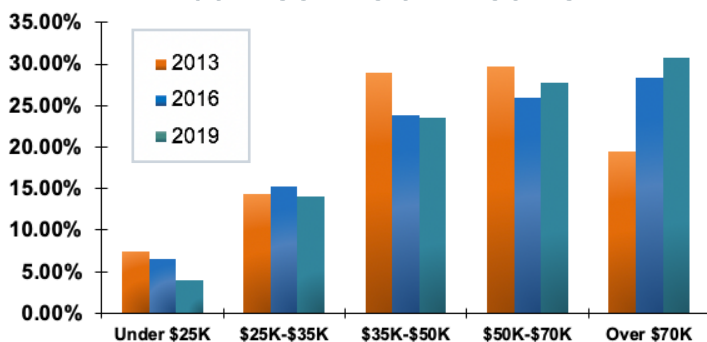
Hiring from another shop, still the largest source of technician hiring (52%), is similar to 2016 (49%), and is down from 61 percent in 2013. Just over 29 percent were hired from a non-automotive industry or as their first job, higher than in 2016 (25%). Over 11 percent were hired from a related automotive industry, similar to the 2016 survey results.

Respondents indicated that 32 percent of their technicians had some level of pre-employment technical education.

More technicians are high school graduates (95%) than the entire adult population (90%).

Businesses responding to the survey report that 79 percent of technicians participated in I-CAR training in the last two years, up from 68 percent in 2016. Over 35 percent of technicians reported some OEM training.

## Annual Technician Income



## COMPENSATION

Flat rate (commission) compensation plans have again decreased to just over two of five technicians (43%), now almost equal to hourly/salary plans (40%).

Although there is a wide distribution, annual income tends to increase with shop sales volume. Income figures shown are for production technicians over 20 years old.

According to survey respondents, average income for production technicians rose from \$52,997 in 2013 and \$53,857 in 2016 to \$54,842 in 2019. This is competitive with similar skilled trades and higher than most.

Almost 31 percent reported earnings of \$70,000 or higher, showing an attractive earning potential as a collision repair technician. (See chart below)

## 2019 National Annual Income Averages

Collision Repair Technician .....	\$54,842
Electronics Technician .....	\$53,190
Machinery Mechanic .....	\$54,000
Tool & Die Maker.....	\$53,650
Chemical Technician .....	\$51,670
Carpenter (Gen./Maint.).....	\$51,120
Heavy Truck Driver .....	\$45,570
Medical Lab Technician.....	\$53,885
Welder .....	\$44,360

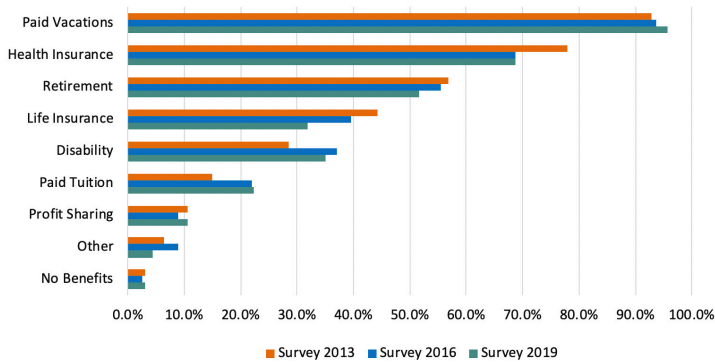
(Other trades source: U.S. Bureau of Labor Statistics)

## BENEFITS

Benefit packages offered to today's collision repair technician workforce show slight increases in Paid Vacations and Tuition Reimbursement. Health Insurance remains steady from 2016, but lower than 2013. Both Retirement Plans and Life Insurance show declines.

In 1995, 19 percent of businesses reported no benefits offered from this list. This has steadily declined, showing less than 3 percent offering none of these benefits in 2019.

## Percent of Shops Offering Each Benefit



## Technician Turnover in the Last 12 Months

Total Technicians ..... 197,500

Technicians Who Left Their Job ..... 30,044 15.2%

Turnover (*within the trade*) ..... 16,069 8.2%

Turnout (*left the trade*) ..... 13,947 7.1%

• Related Job Within Industry ..... 4,342 2.2%

• Different Job Outside Industry ..... 5,614 2.8%

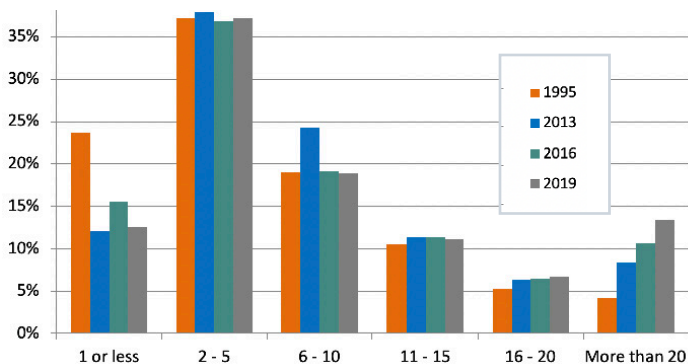
• Retired from Workforce ..... 3,991 2.0%

## TECHNICIAN TURNOVER

Almost one of every seven technicians (15.2%) left their jobs within the last year, similar to the results found in 2016 (14.5%).

Half of all reported technicians have been with their current employer for 5 years or less, similar to previous surveys. Those staying on the job for over 20 years has increased each year to over 13 percent in 2019.

### Years with Current Employer



Similar to 2016, of those who left their jobs, over half (54%) left for another shop. This is **turnover** within the industry and, while disruptive to an individual shop, does not increase or decrease the pool of available technicians.

Industry **turnout** decreases the number of working technicians available. In the last 12 months, approximately one in fourteen collision technicians (7.1%) left the trade, slightly more than in the 2016 Survey (6.2%).

Some technicians (2.0%) left their job for a different position, but are still working in an automotive business. Other technicians (2.8%) left the collision repair industry completely. In addition, two percent of technicians retired from the workforce.

The survey asked about how many open technician positions the shop has currently. Unfilled entry-level needs averaged 0.7 technicians per shop, while unfilled experienced technician needs averaged 1.2 per shop.

## ENTRY-LEVEL TECHNICIANS

Almost three out of five shops (56.4%) reported hiring at least one entry-level technician during the previous 12 months.

### Recruiting Entry-Level Technicians

	2016	2019
Online Postings.....	37.9%	52.8%
Asking Vendors.....	44.9%	50.2%
Social Networks.....	22.3%	49.8%
Technical Schools.....	38.1%	41.1%
Automotive Associations.....	10.9%	26.8%
General Career Fairs.....	7.5%	23.6%
Newspaper Ads.....	19.0%	15.5%
Help-Wanted Sign.....	9.2%	15.1%

The most effective recruitment method reported is now online postings, followed closely by social media. Career fairs showed improved effectiveness as ranked by respondents.

Over three of five respondents (62%) identified one collision repair school in their area and almost two of every five (38%) identified a second one.

Fully 64 percent rated their schools as Good or above.

Of those who have hired from these schools, almost all would hire more. Many of those who have not yet hired from a technical school program indicated they would like to.

## TECHNICAL TRAINING PROGRAMS

Survey respondents indicated which tasks they would expect a technical school program graduate to be able to perform with very little supervision. Respondents chose an average of 9.3 tasks, similar to selections made in 2016 (9.2 tasks).

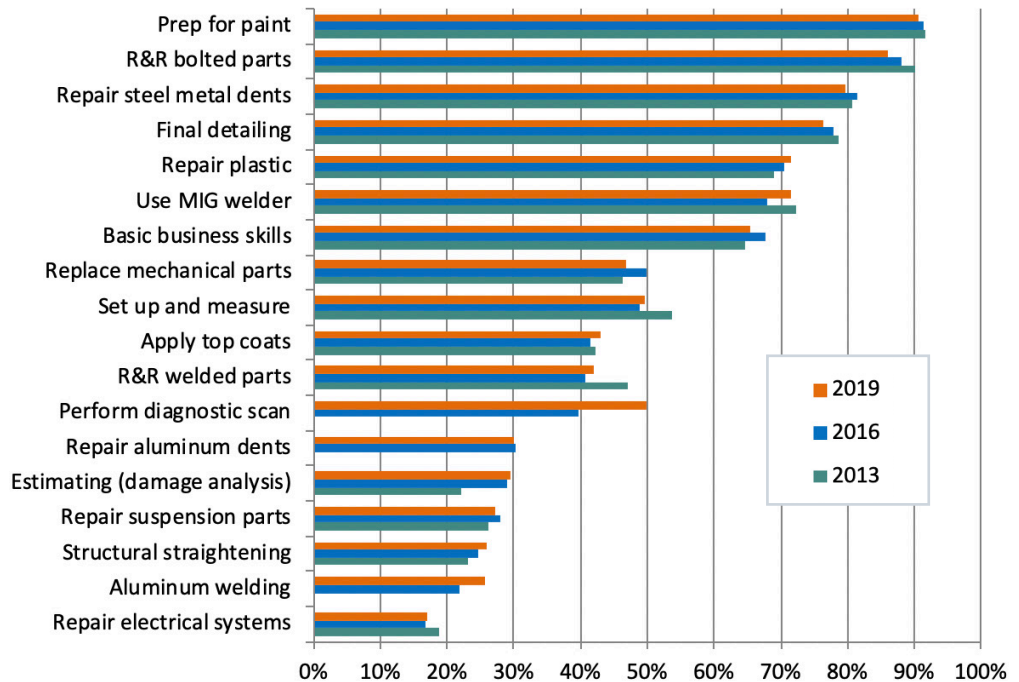
The top four requested tasks remained the same, as they have since 1995. Electrical Repairs is still the least expected entry-level skill.

Notable is a sizeable increase for Performing Diagnostic Scans, reflecting new automotive technologies becoming more commonplace in collision repairs.

## CONCLUSIONS

- The collision repair industry is predominantly independent businesses that have increased slightly in number while also increasing in average size, number of employees, and sales volume.
- \* Over half of shops reported six or more technicians, and the industry total number of production technicians has increased overall.
- \* The average age of technicians continues to rise and is now over 41 years old.
- \* Average technician income has again increased, is still higher than most comparable trades, and has almost one of every three earning \$70,000 or more.
- The benefits of paid vacations and paid tuition increased slightly since the last survey.
- Technician turnover (within the industry) has remained steady, while technician turnout (leaving the industry) has increased slightly. Retirements have also increased.
- \* Almost three out of five shops reported hiring at least one entry-level technician in the past year.
- \* Of those businesses that have hired from a collision repair school program in their area, almost all would hire again.
- \* Almost two-thirds of respondents rated their local technical schools as “Good,” “Very Good,” or “Excellent.”
- \* Expectations for collision repair of technical school program graduates have remained steady over the years with Prep for Paint, R&R Bolted Parts, Repair Steel Metal Dents, and Final Detailing still the top four skills.

## Entry-Level Technician Task Expectations



Collision Repair Education Foundation | 5125 Trillium Blvd. | Hoffman Estates, IL 60192  
888.722.3787 | FAX 847.463.5482

[CollisionEducationFoundation.org](http://CollisionEducationFoundation.org)

COLLISION REPAIR EDUCATION  
**FOUNDATION**  
I-CAR

CO-SPONSORED BY  
**I-CAR**