



Repairers' Choice Awards

Survey

ANALYSIS

The responses by individual companies are contained within the sector graphs, however it is interesting to provide an overall view by market sector.

REPAIRERS' CHOICE INDUSTRY AWARDS

Six of our Night of Knights industry award categories include a "Repairers' Choice Award".

These awards are unique in the industry as they take into account **just one view** – the **bodyshop repairers**, who have rated their suppliers via a survey circulated to UK Bodyshops.

To ensure maximum industry involvement we used a combination of direct mail, direct email, telephone and our sponsors to distribute the Repairers' Choice survey to both ABP Club member and non-member bodyshops. We were delighted to receive 436 responses this year, which provides ample data to form statistically sound analysis and judgement; 57.1% of the responses were from Club bodyshop members, with the remaining 42.9% from non-member bodyshops.

The results truly reflect the Repairers' Choice, providing one or two interesting market indicators as you will see on the following pages.

MARKET SECTOR ANALYSIS

This series of graphs commencing on page 57 (opposite) illustrate how bodyshops view their relationship with each of the market sectors.

Individual company responses are contained within the category graphs commencing page 60.

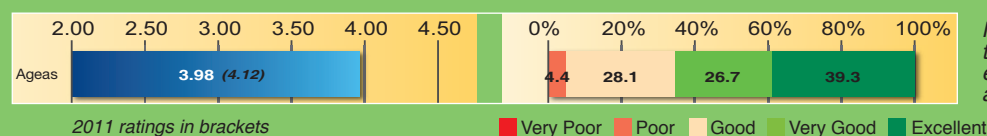
GRAPH RATINGS EXPLAINED

The **Repairers' Choice Awards** graphs show two tables. The left hand side graph shows an overall rating.

The right hand side graph provides the percentage split by votes polled. As an example the insurance category winner – Ageas, received 135 votes: Very poor – 2, Poor – 6, Good – 38, Very good – 36, Excellent – 53

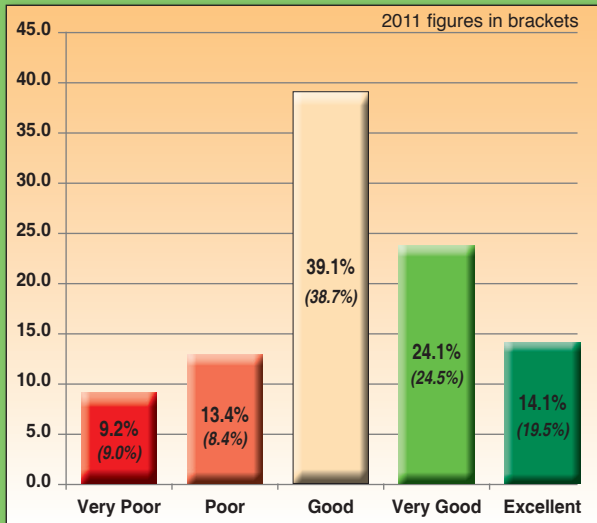
Each vote is weighted: Very poor – 1, Poor – 2, Good – 3, Very good – 4, Excellent – 5

Therefore, $2 \times 1 = 2$, $6 \times 2 = 12$, $38 \times 3 = 114$, $36 \times 4 = 144$, $53 \times 5 = 265$ giving a total score of 537 divided by 135 (No of respondents) provides a rating of **3.98**.



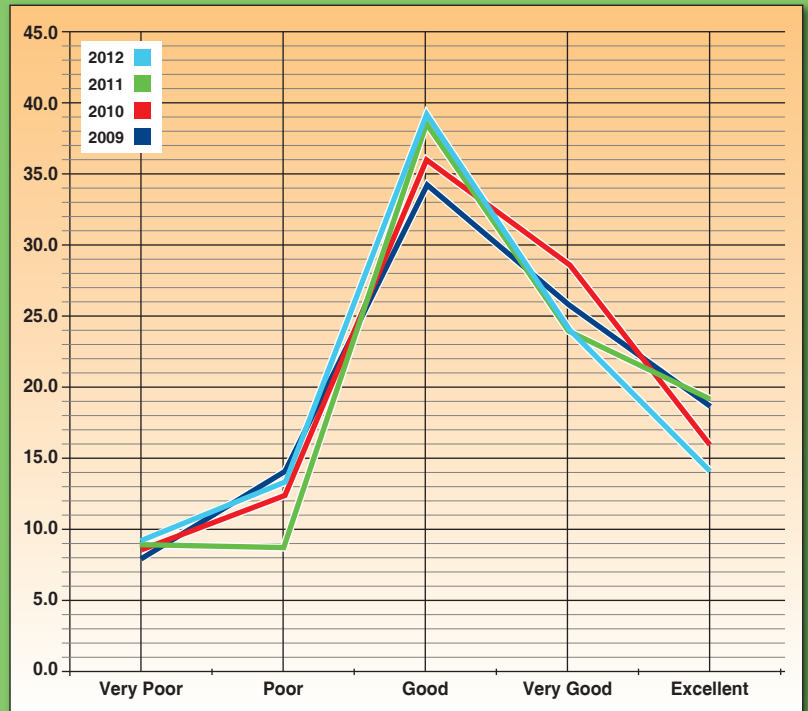
Note: Any company within any category that received less than 40 ratings was excluded from the final analysis to ensure an equitable result.

Motor Insurance Companies

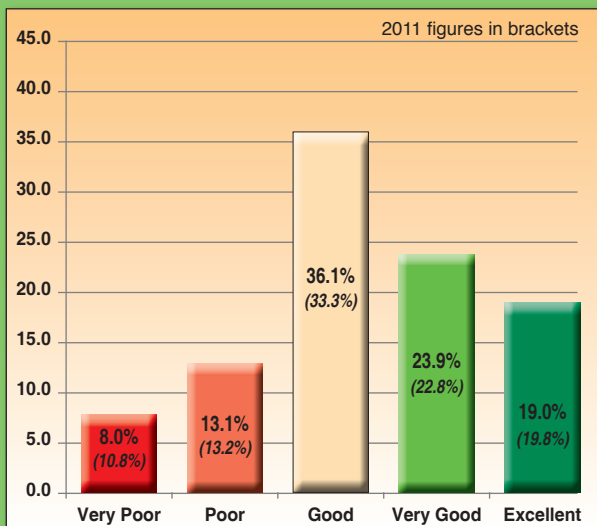


There appears to be a slight deterioration in insurer relations with 22.6% rating their relationships as 'Very Poor' or 'Poor', up from 17.4% in 2011, which suggests that unnecessary conflict remains. That said, the remaining 77.4% in general appear satisfied with insurer relations, however this is a slight decline on 2011, when 83% rated insurers as 'Good', 'Very Good' or 'Excellent'.

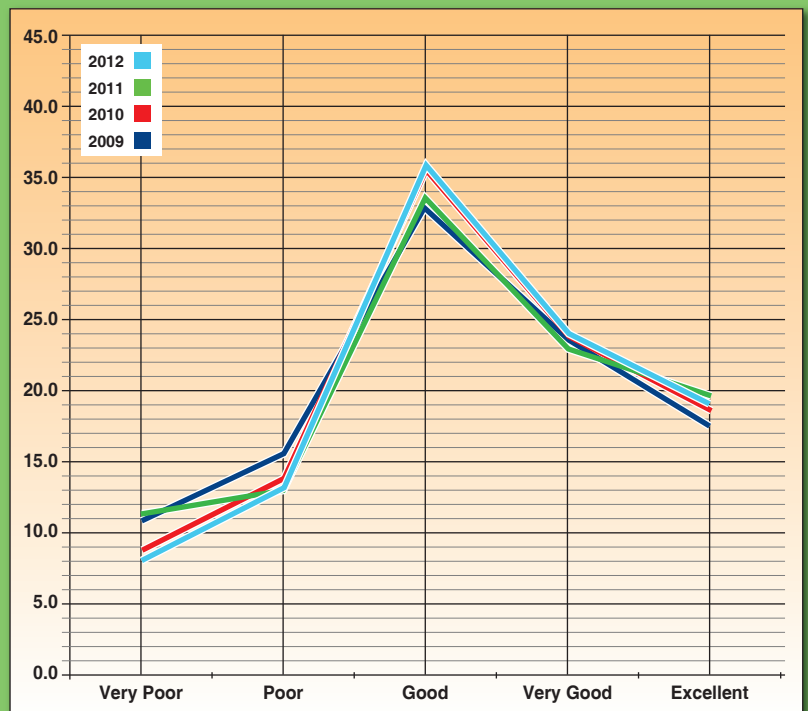
The main change in the graph from 2011 is a reduced 'Excellent' rating (from 19.5% down to 14.1%) and an increased 'Poor' rating (up from 8.4% to 13.4%). The graph above shows the past four year's results, which show remarkably similar trends.



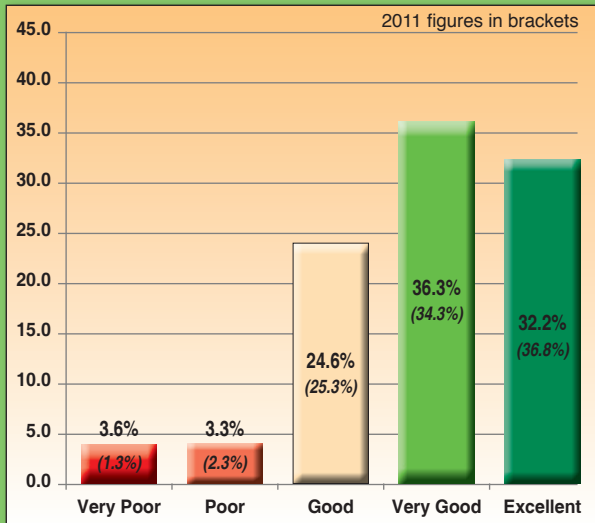
Accident Management Companies



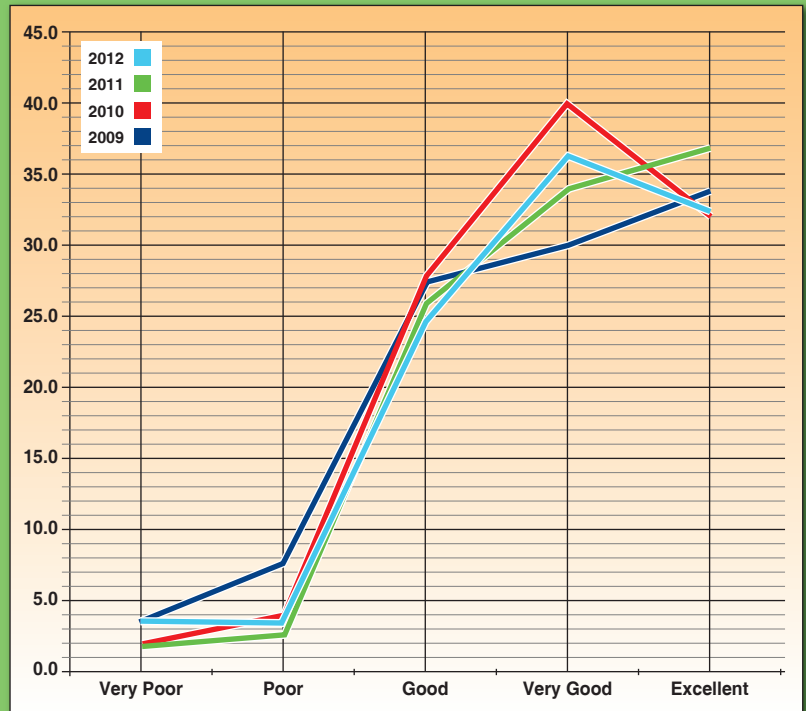
Accident management companies are viewed very much in the same way as insurers, as can be seen from the above graphs with 24% viewing their relationship as Poor or Very Poor.



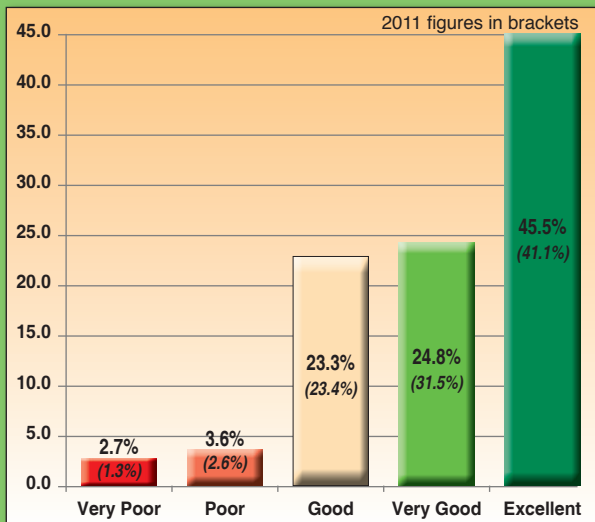
Paint Companies & Brands



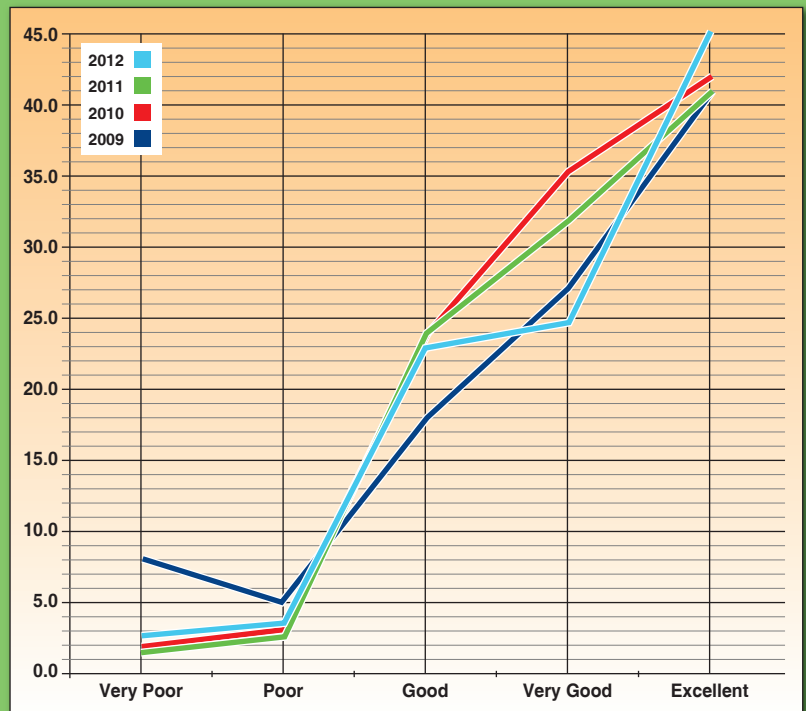
Paint companies continue to fare particularly well with bodyshops with 93.1% of respondents rating them as 'Good', 'Very Good' or 'Excellent' to deal with. The graph to the right shows that an over 90% rating for 'Good', 'Very Good' or 'Excellent' has been the case for the past four years.



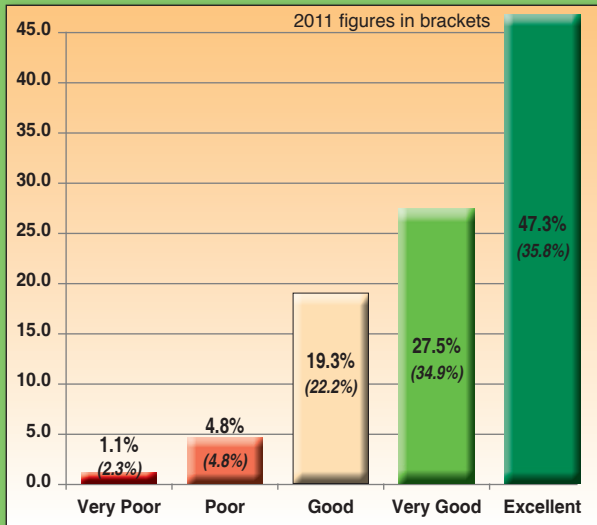
Paint Distributors



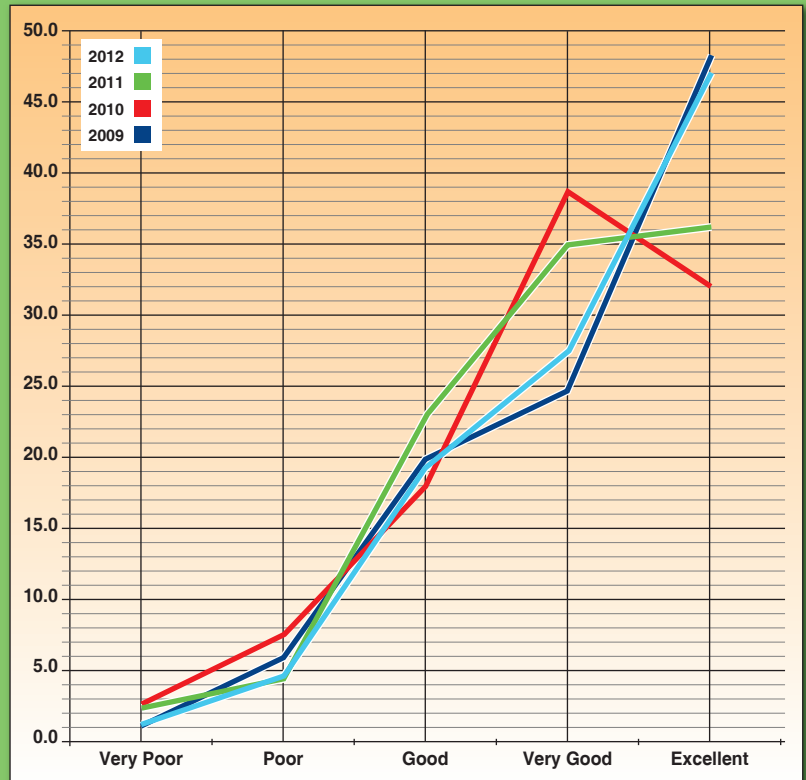
Paint Distribution companies also fared extremely well with nearly half of all respondents rating them as 'Excellent'. In total, a similar rating to that of paint companies was recorded – 93.6% of respondents rated Distributors 'Good', 'Very Good' or 'Excellent' to deal with.



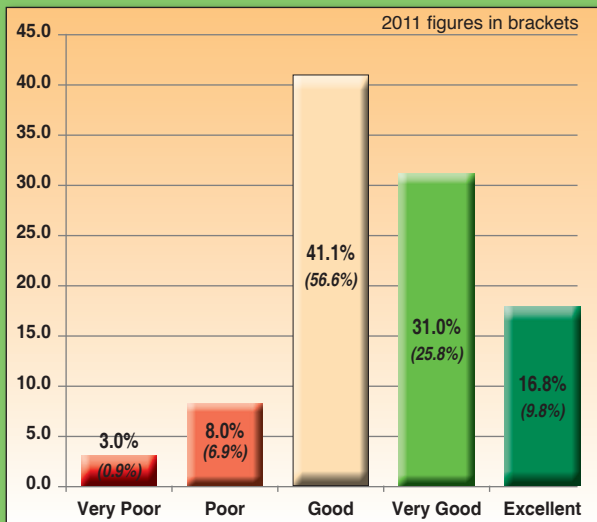
Bodyshop Management Systems



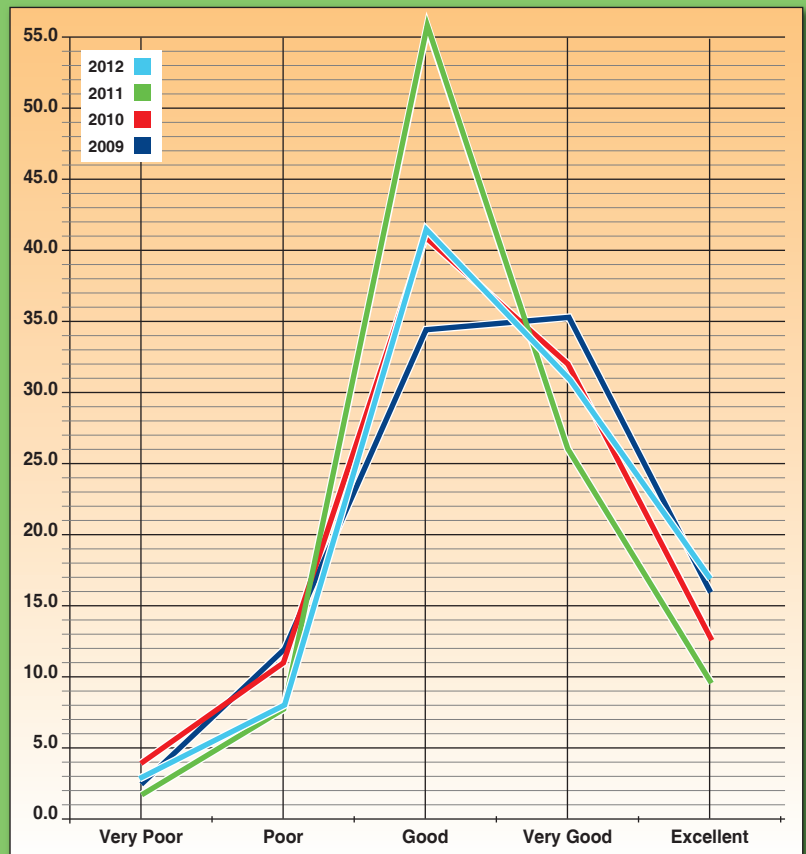
Not surprisingly, **Bodyshop Management systems** are once again also viewed very positively, with 46.8% rating their system provider relationship/performance as 'Good' / 'Very Good' and a further 47.3% rating their system as 'Excellent'



Bodyshop Estimating Systems

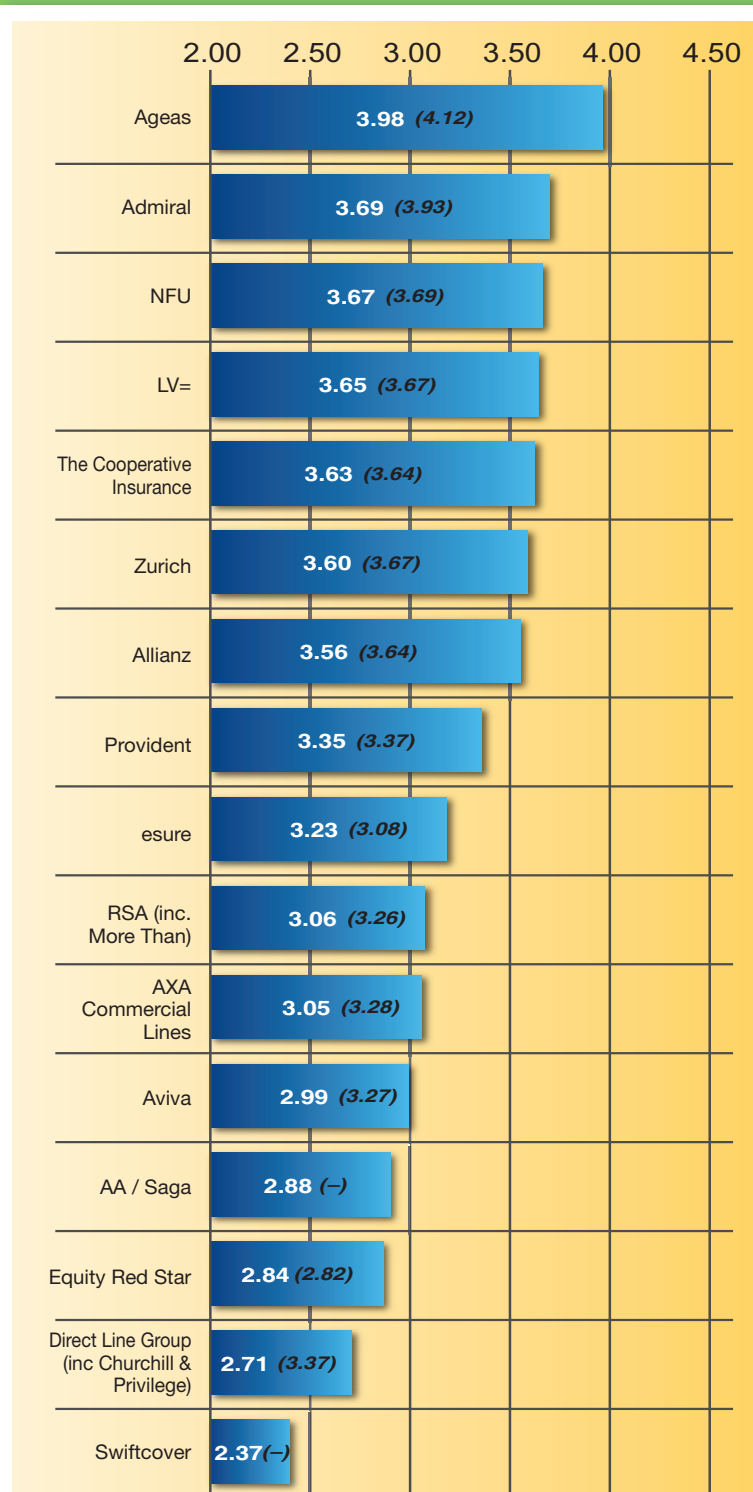


Estimating systems have historically been rated less favourably than Bodyshop Management Systems, and this is once again the case in 2012. That said, the 'Very Good' or 'Excellent' ratings have both risen by over 5 percentage points, seemingly gained from the 'Good' rating which has reduced from 56.6% in 2011 to 41.1% in 2012. 11% of respondents view their estimating systems as 'Poor' / 'Very Poor', up from 7.8% last year.

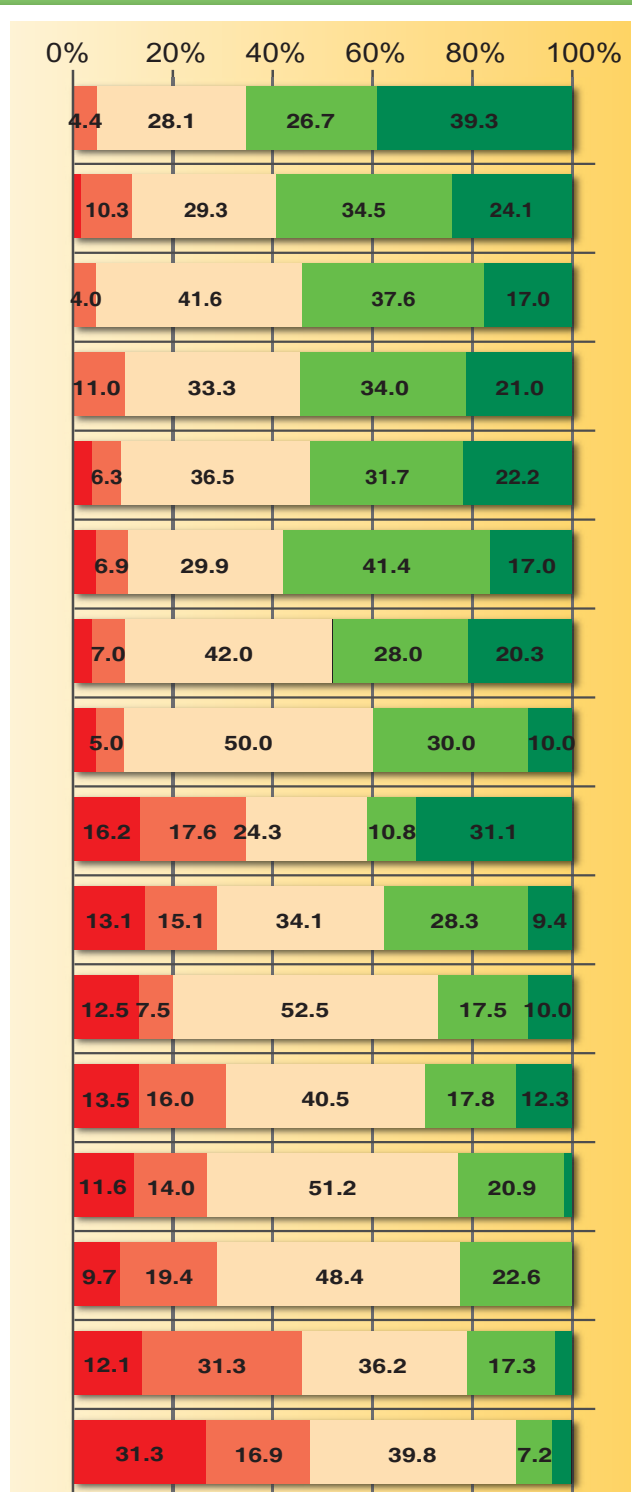


Motor Insurance Companies

We asked: Please select the five insurance companies that you receive the most work from by volume percentage and give each of them an overall rating on how you view working with them.



2011 ratings in brackets



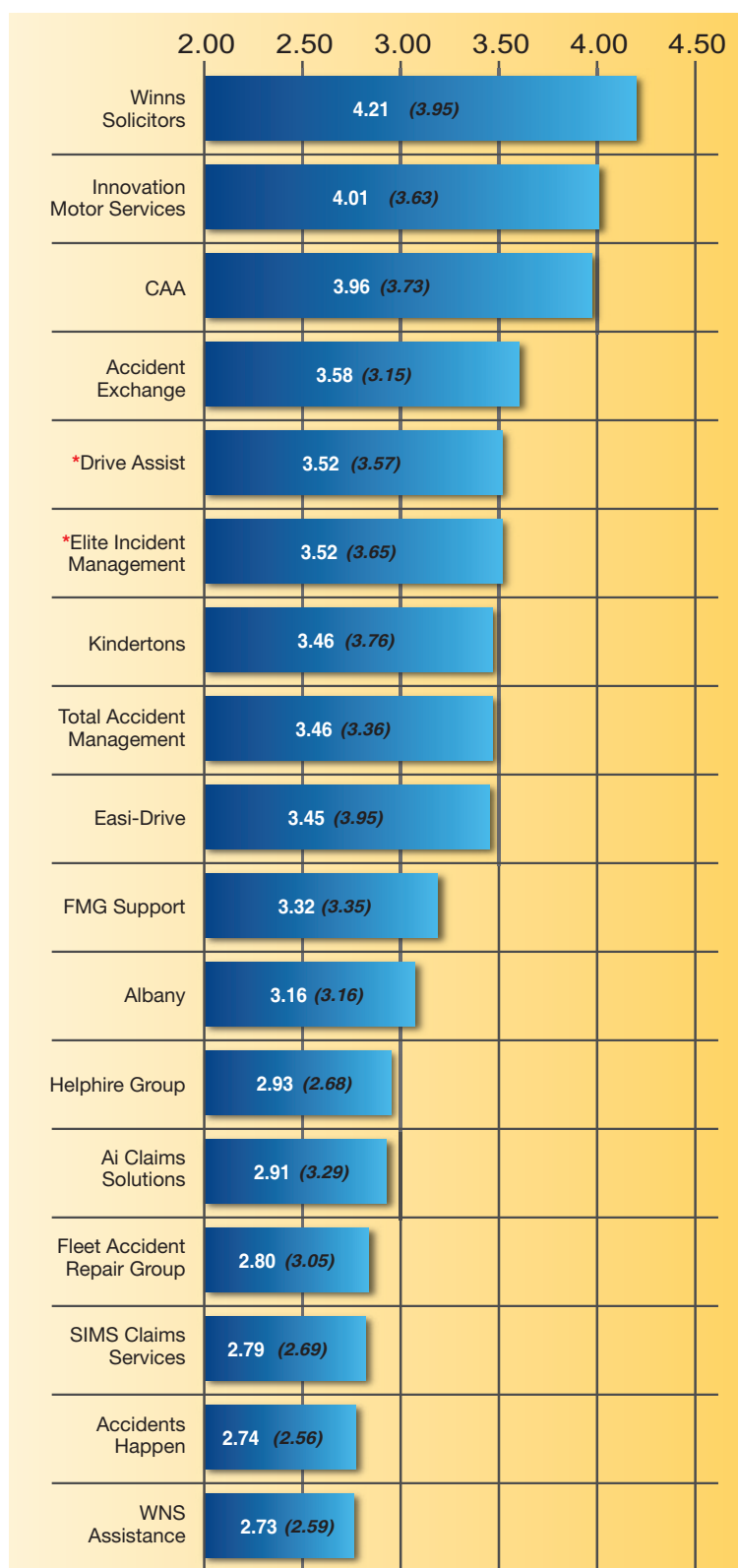
Very Poor Poor Good Very Good Excellent

Ageas is once again the Repairers' Choice of insurer they most like working with. There has been a slight decline in their overall rating this year which is mainly due to a lower number of 'excellent' responses, down from 44.9% in 2011 to 39.3% this year. Admiral and NFU reverse their positions in second and third place in a top seven that sees the

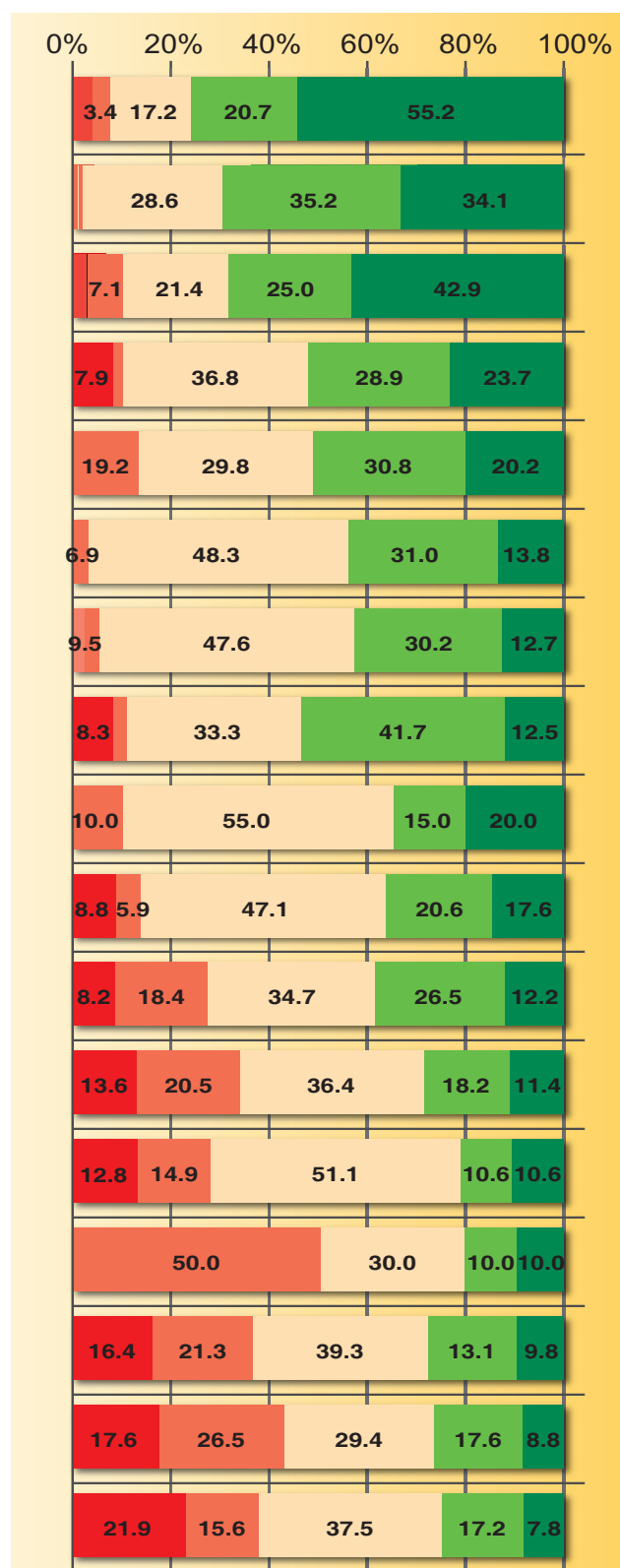
same insurance companies being rated similar to last year. Direct Line Group, formerly RBS, saw their rating by repairers plummet as 43.4% rated them as 'very poor' or 'poor' (up from a combined 18.7% in 2011) – they fall from 8th to 15th position.

Accident Management/Credit Hire Companies

We asked: Please select the five accident management / credit hire companies that you receive the most work from by volume percentage and give each of them an overall rating on how you view working with them.



2011 ratings in brackets



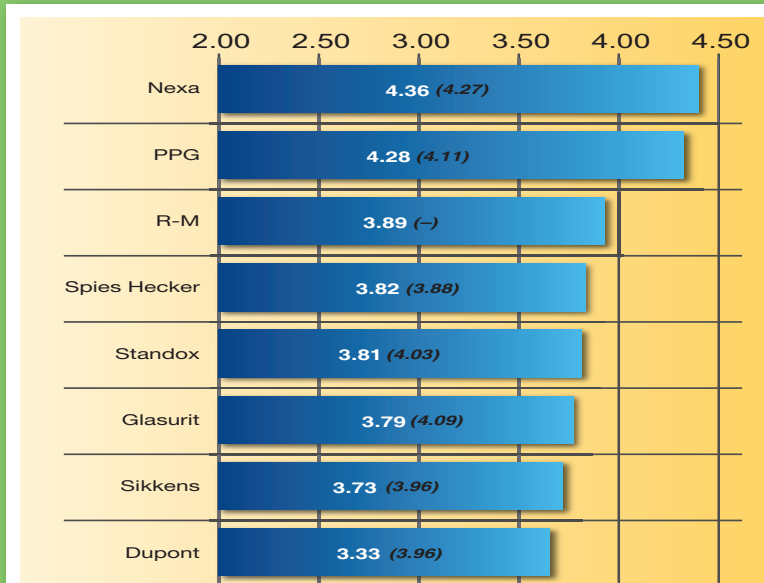
Very Poor Poor Good Very Good Excellent

Winn Solicitors regain top spot as they were the Repairers' Choice of the Accident Management/Credit Hire Company category, gaining a high percentage of 'excellent' and 'very good' responses. Innovation Motor Services are elevated into second position (from 6th in 2011) whilst Easi-Drive, last year's winners, slip down to 9th position.

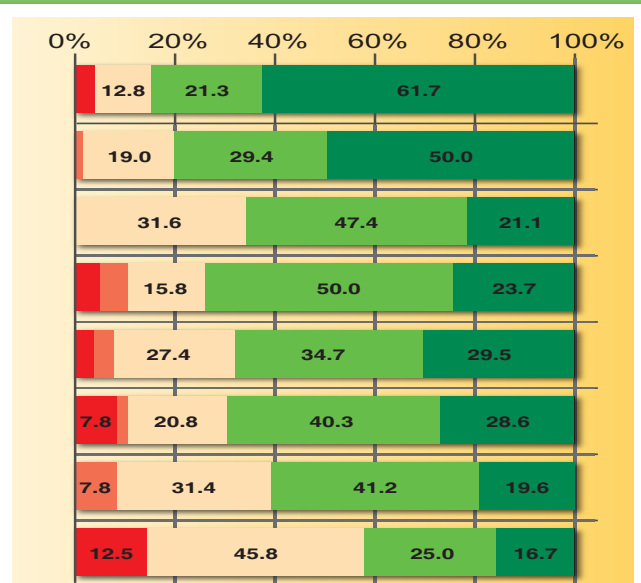
*The companies in 5th and 6th position, Drive Assist and Easi-Drive both declared that administrators had been appointed to their respective companies at time of going to print.

Paint Companies and Brands

We asked: Please select the two paint brands that you use the most and provide an overall rating on how you view working with them (considering product, service and technical support).



2011 ratings in brackets



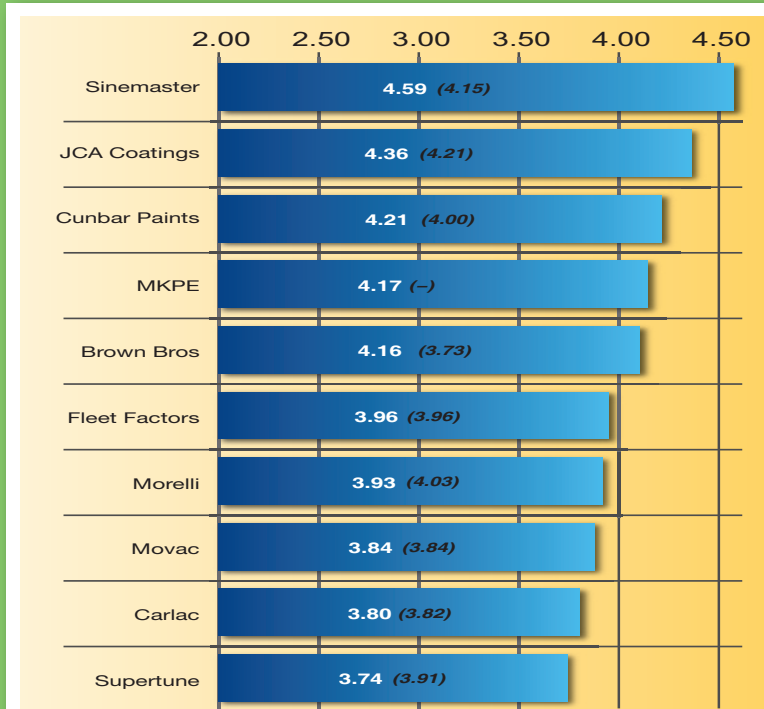
Very Poor Poor Good Very Good Excellent

Nexa is the Repairers' Choice of paint brand receiving a slightly better rating than in 2011 mainly due to the percentage of 'excellent' responses. PPG holds on to second place whilst a

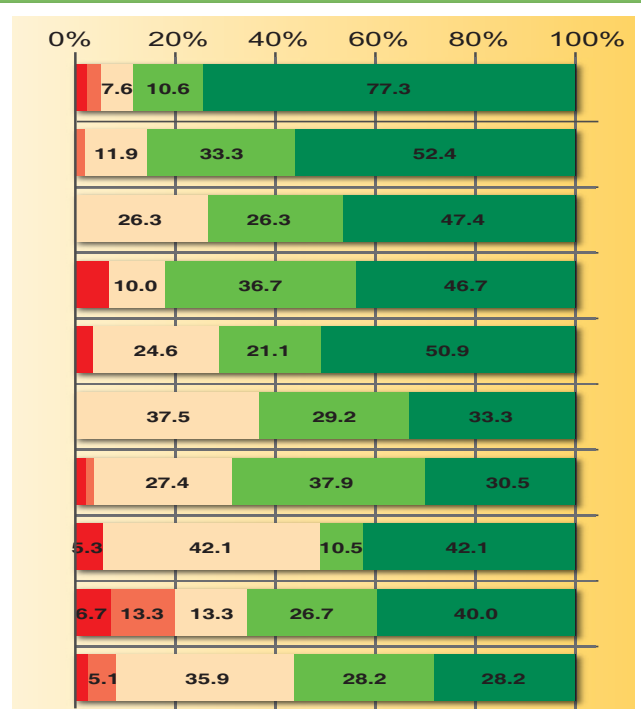
new entry for 2012, R-M rates highly in 3rd position – R-M had rated highly in previous years but hadn't received a sufficient number of responses to feature.

Paint Distributors

We asked: Please select the two distributors that you use the most and provide an overall rating on how you view working with them (considering product, service and technical support).



2011 ratings in brackets



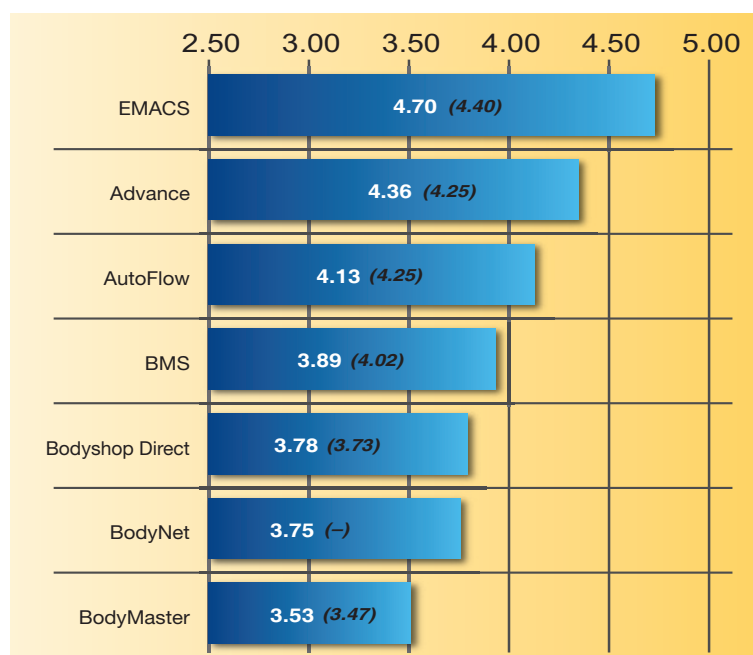
Very Poor Poor Good Very Good Excellent

In a similar vein to paint companies/brands, paint distributors rate very highly with repairers. Sinemaster regained top spot from JCA Coatings, both of whom improved their overall ratings. Sinemaster gained a 77.3% 'excellent' rating from respondents, which is the defining difference, making them the Repairers' Choice for 2012. MKPE make their first

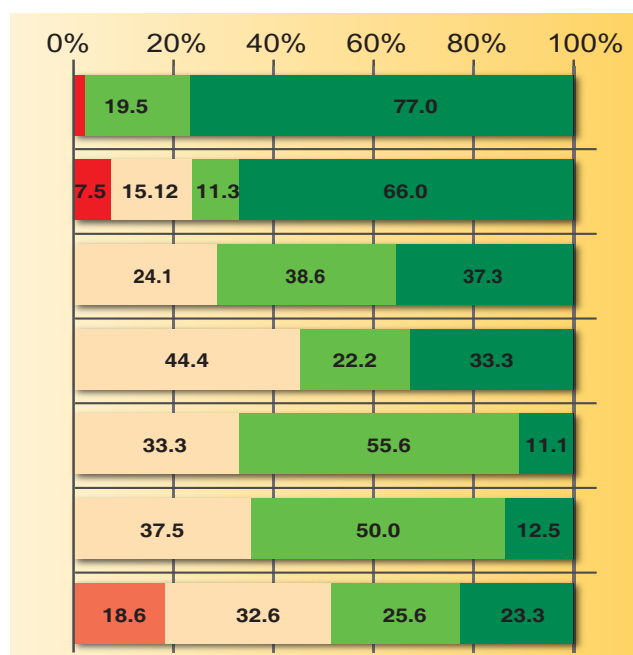
appearance, in at 4th position just behind Cunbar Paints who climb from 5th in 2011. Whilst the above graph shows the top ten distributors, it is fair to say that all other distributors were rated well by respondents – unfortunately we are unable to publish these as they had an insufficient number of responses – below 40 which is our minimum number.

Bodyshop Management Systems

We asked: Please select your main bodyshop management system and provide an overall rating on its performance.



2010 ratings in brackets



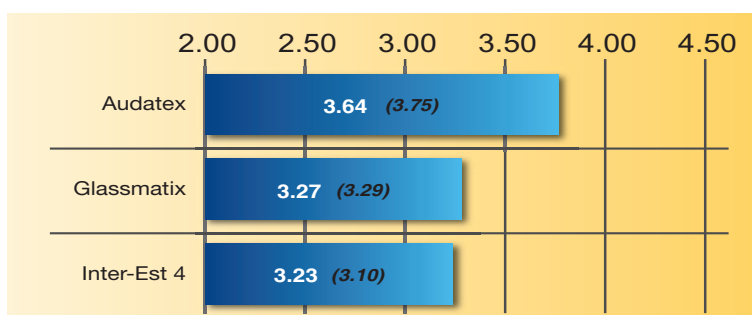
Very Poor Poor Good Very Good Excellent

EMACS has dominated this category winning it now for the 4th consecutive year, mainly due to 77% 'excellent' rating from respondents making them the Repairers' Choice for 2012.

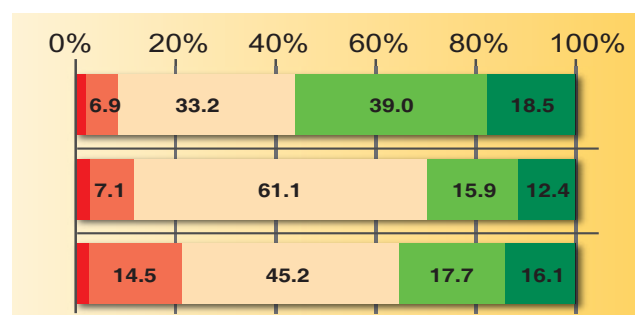
Advance was elevated to 2nd position, whilst Autoflow also is highly rated by respondents, achieving a similar overall score (4.13 out of 5) to last year.

Bodyshop Estimating Systems

We asked: Please select the two estimating systems you use the most and provide an overall rating on its performance.



2011 ratings in brackets



Very Poor Poor Good Very Good Excellent

Only three companies received a sufficient number of votes to be included in the estimating system graphs, namely Audatex, GlassMatix and Inter-est 4.

Audatex is once again the Repairers' Choice of estimating system with a very similar overall rating to 2011 and indeed 2010 – 3.64 out of 5.