

Collision Technician Survey

Survey Background & Introduction

Collision repair technicians are a critical component of collision repair business operations – without them, businesses could not function. Today, repair shops typically cite their shops see an average of 30-40% of technicians turning over each year, which causes significant disruption to business. Given the recent technician retention crisis, the sentiments and career outlook of collision repair technicians are becoming increasingly important concerns for the collision repair service industry. In late 2023, I-CAR (along with SCRS) partnered with Ducker Carlisle to conduct a survey of nearly 840 collision technicians to better understand the drivers of their satisfaction.

While the technician crisis is a growing challenge and area of focus for the collision repair service industry, it is something Ducker Carlisle has been working on with automotive OEMs for many years. Ducker Carlisle is an industry leader when it comes to highlighting this as an area of concern and in working actively with a group of OEMs through the Automotive Technician Collaboration (ATC) to address both recruitment and retention challenges. Decades of automotive dealer technician surveys provide Ducker Carlisle with a deep understanding of the key drivers of satisfaction. This expertise aided in the development of the survey focus areas, and also provides the ability to offer a comparison between collision and dealer service technicians in some key topics.

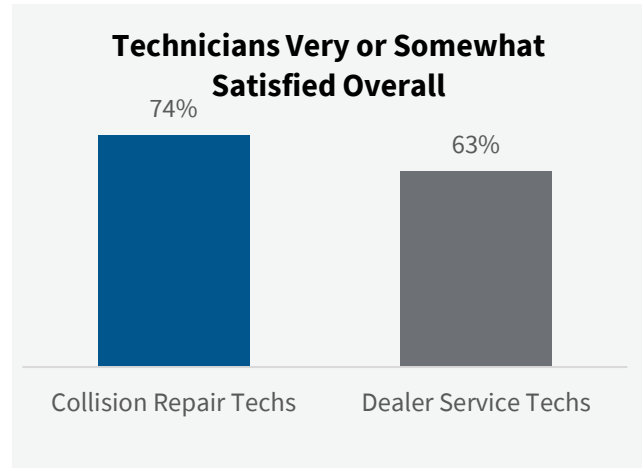
In this article, we provide an overview of the key areas covered in the survey:

- I. Overall Satisfaction
- II. Compensation & Pay Plan
- III. Benefits Offerings
- IV. Technical Training
- V. Career Outlook & Progression
- VI. New Technology
- VII. *Appendix: Respondent Details*



Overall Satisfaction

As a whole, collision technicians are notably happier and more likely to plan to stay in their current position than their dealer service technician counterparts. However, they are still broadly hesitant to recommend the career to others, indicating there is certainly room for improvement. With over a quarter of collision techs unsatisfied and planning to leave their current role within 2 years, what can the industry do to improve the career and continue to foster retention?



Among collision techs, we found differences in satisfaction by primary role, with ADAS techs most satisfied (~90%) and refinish techs least satisfied (~70%). Regardless of role or employer, techs note that the most significant impact on their happiness stems from the work environment itself and appreciation demonstrated from their management.

“Increased wages, more challenging work, and more learning experiences”

“Moving into a more modern direction. Updating equipment and starting to follow procedures and guidelines...more quality over quantity”

“Healthy work environment, teamwork oriented, and heated/ac shop/ good benefits and pay”

<h3>Takeaways & Recommendations</h3>	<p>Collect direct feedback from your technicians Conduct surveys, interviews, collect exit feedback, etc. to better understand any specific concerns and identify what you can improve</p> <p>Use this input as a recruitment tool Highlight the areas you’re doing well in when recruiting new technicians into your shop!</p>
--	---

Compensation & Pay Plan

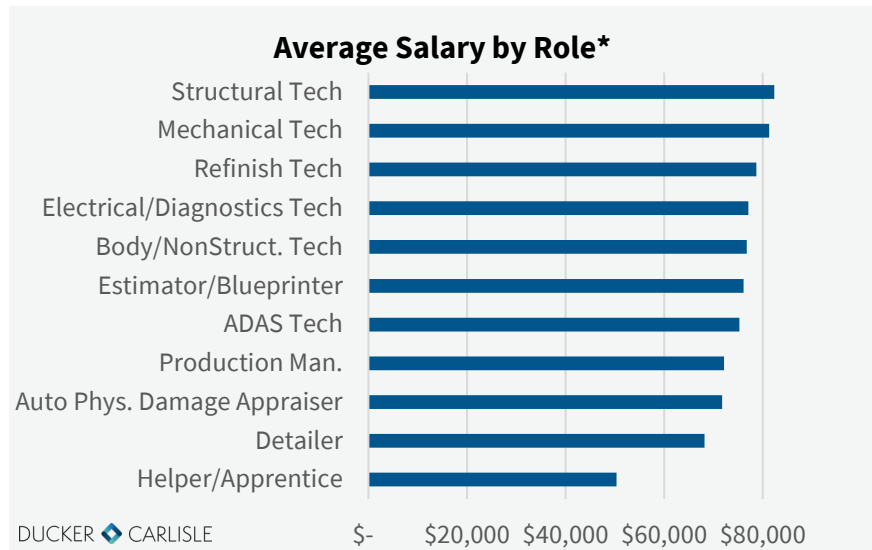
The collision technician career has a high earning potential; with a sizeable portion of experienced techs earning over \$100k a year. Technicians with a few years' of experience (6-9) earn \$72k on average. This is contrasted with newer techs, who see a relatively high barrier to entry into the field – nearly 40% of collision techs with 0-5 years of experience earn under \$40k a year. This fact likely impacts prospective technicians' interest in the career. Considering what one has to invest to start out (education, tools, etc.), many may be scared away by the idea of not seeing a positive return for years.

37% of techs with **10+ years** of experience earn above **\$100K**

39% of techs with **0-5 years** of experience earn under **\$40K**

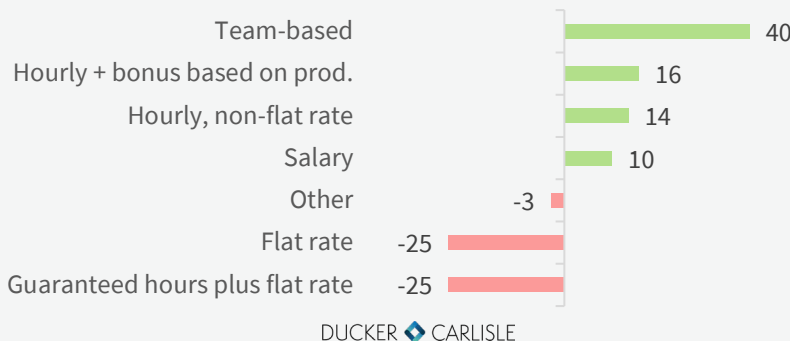
DUCKER  CARLISLE

Next, let's look at average compensation by facility type and job role, regardless of tenure. On average, we see technicians who work at larger, multi-location facilities earning slightly more than dealer techs (\$84k vs. \$82k). Collision techs working at single-location, independent facilities earn the least on average (\$71k). Note that there was no distinction between certified and non-certified shops within this survey.



By role, structural techs earn the highest salary on average, with apprentices earning the lowest.

Likelihood to Recommend Collision Tech Career to Friend by Pay Type, Net Promoter Score



When talking compensation, perhaps the most important factor is **how** the technicians are paid. The majority of collision techs are paid on a flat rate system, meaning they earn based on hours turned, not hours worked.

With over 60% of technicians on flat rate pay plans, it should raise concern to see

that it's incredibly unpopular – flat rate technicians overwhelmingly would not recommend the career to friends or family.

We see a similar story when we look at dealer service technicians. Dealer service techs are even more likely to be paid via a flat rate (nearly 70%), and this is just as unpopular for them as it is for collision techs. When speaking with dealer principals, we often hear two primary reasons for maintaining the flat rate system despite its problems:

1. Some technicians (particularly those that are more tenured) are able to earn extremely well on flat rate and would be deeply unhappy on another pay plan
2. Fear that any other pay plan wouldn't properly incentivize techs to turn hours, resulting in an overall drop in shop productivity

Despite these concerns, the fact remains that the flat rate system drives dissatisfaction. This dissatisfaction is in stark comparison to every other type of pay plan (team-based, hourly, salary) – all of which represent technicians who would recommend the career. This is clearly a driver of career perception and may be impacting new technician recruitment. Flat rate can be particularly challenging for newer techs who are still learning the ropes. They may end up working many more hours than they earn, struggling to make ends meet. This is yet another concern for recruiting new technicians into the collision industry.

“The amount of work we have is insane...it’s super inefficient and stressful and very hard to make money because of it”

“...difficult to repair vehicles properly & get paid accordingly. It’s a skilled trade I love, but fighting for pay is extremely exhausting”

Takeaways & Recommendations

Compare overall compensation to other employers

Shops need to understand if their total compensation package is in line with other employers in the area, to ensure that you are offering a competitive and fair wage

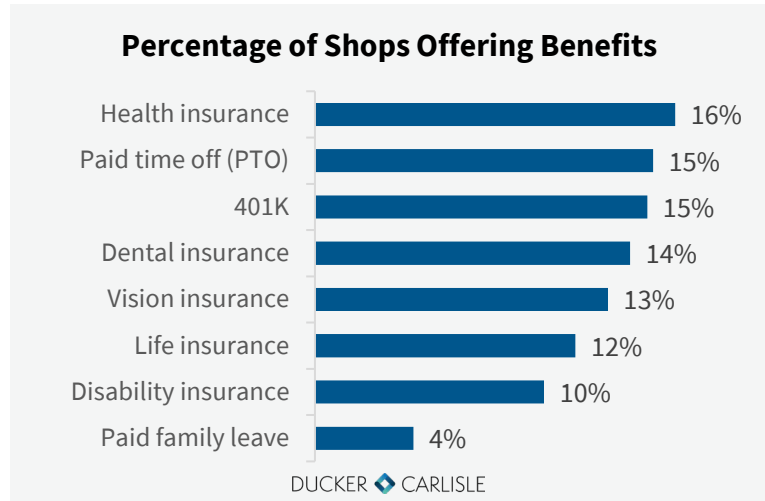
Assess pay methodology, especially if using flat rate

Not all technicians need to be paid using the same methodology. Work with technicians to understand what will motivate and incentivize them

Benefits Offerings

Benefits offerings in the industry are very minimal, with common salaried job benefits such as health insurance and PTO offered by only about 15% of shops.

While possible that some respondents are simply unaware that their employers offer these benefits, this still represents an issue in the industry. Regardless of whether benefits aren't offered or just aren't well publicized, the outcome is the same – collision techs aren't receiving benefits that are largely seen as standard practice.



When designing benefit packages, collision shops must remember that their techs are not just looking at other technician jobs. They see what their friends and family receive for benefits in their careers. Some technicians decide to leave the industry entirely, believing they have a better opportunity for a full benefits package elsewhere.

“...we have no insurance no vacation no paid time off no workman’s comp. When I got a hernia on the job, I had to pay for it myself”

“401k needs to be matched like most other industries and health insurance needs to be better”

“[I would like more] PTO, sick days and better retirement matching”

Takeaways & Recommendations

Compare total benefits package to other local employers

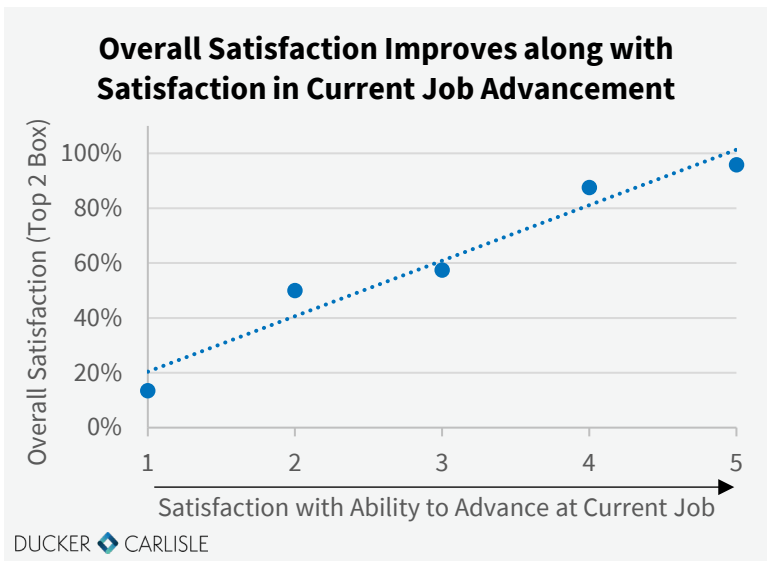
Beyond ensuring that you offer a competitive wage, collision shops need to look at benefits packages outside the automotive industry and match the local standards

Regularly educate employees on the benefits offerings

Ensure all employees – especially newer and younger techs – fully understand the benefits offered through annual educational meetings, enrollment overviews, etc.

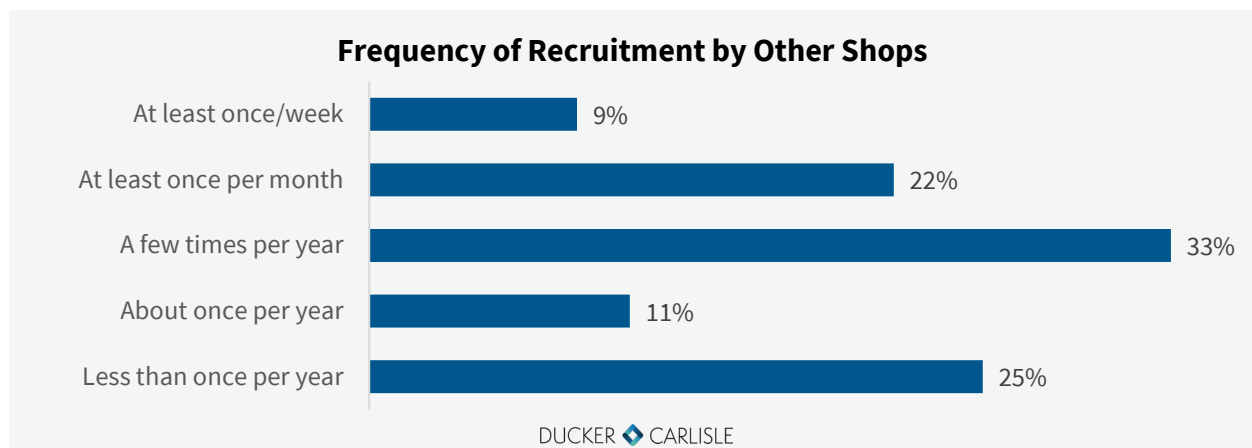
Career Outlook & Progression

Overall satisfaction with career advancement is mediocre at best, with nearly half (43%) of technicians either dissatisfied or neutral with their ability to advance at their current job. This is a problem for the industry – opportunity for career advancement is very strongly correlated with overall technician satisfaction. Technicians need to know that there are real advancement opportunities for them within the industry. They may feel there’s not much growth within their current role, so collision shops need to educate them on what opportunities there could be longer-term, perhaps outside of their current shop.

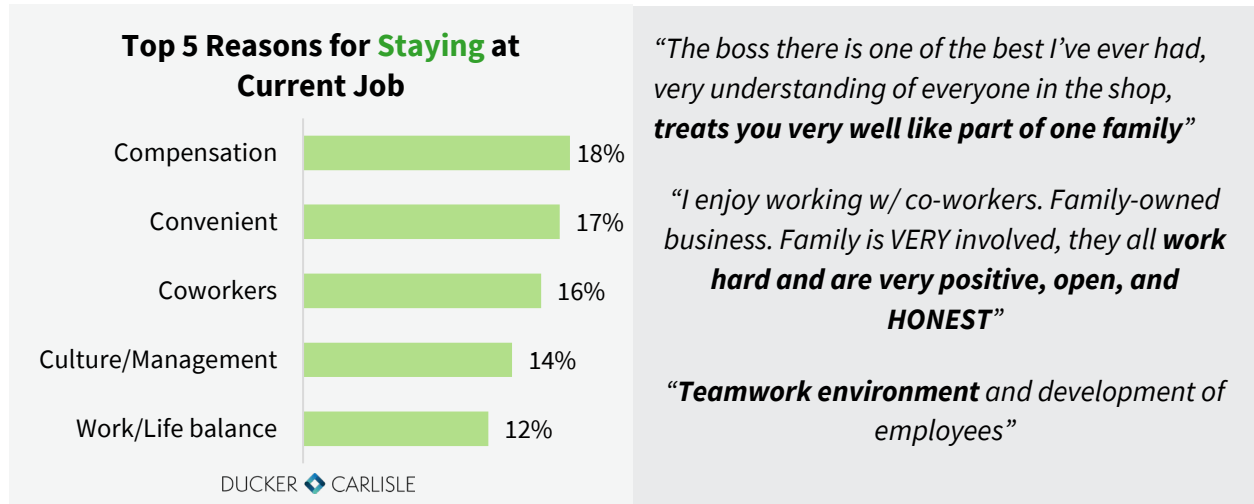


While 96% of technicians who are “very satisfied” with their career advancement opportunities are overall very satisfied, just 13% of technicians who are very dissatisfied with advancement are overall very satisfied. Understandably, a technician’s perception of their ability to grow and move up within their career significantly impacts their overall feelings toward their job. Shops who do a good job with this are supportive of their technicians’ career ambitions. They help outline career growth opportunities and clear paths and encourage an approach of continuous learning and training to get there.

Importantly, those technicians who may be looking for other opportunities don’t have to look far. Collision techs are regularly being recruited by competing shops. Nearly a third of respondents reported that they are recruited once a month or more frequently. If a technician is dissatisfied with their career outlook at their current shop, they can easily find work elsewhere.



Beyond career advancement, shop culture, management, and overall team environment have a significant impact on technicians. Shop culture is the reason many want to stay at their current role, but it can also be the reason many want to leave.



Takeaways & Recommendations

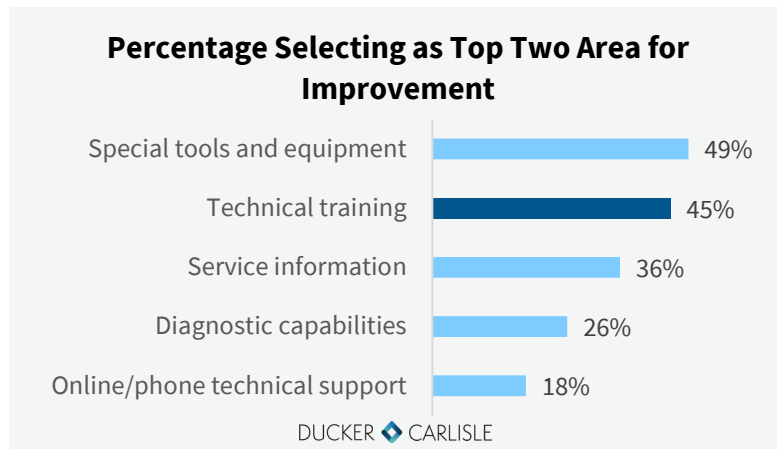
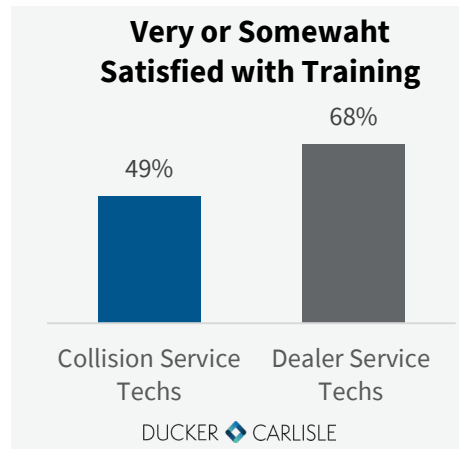
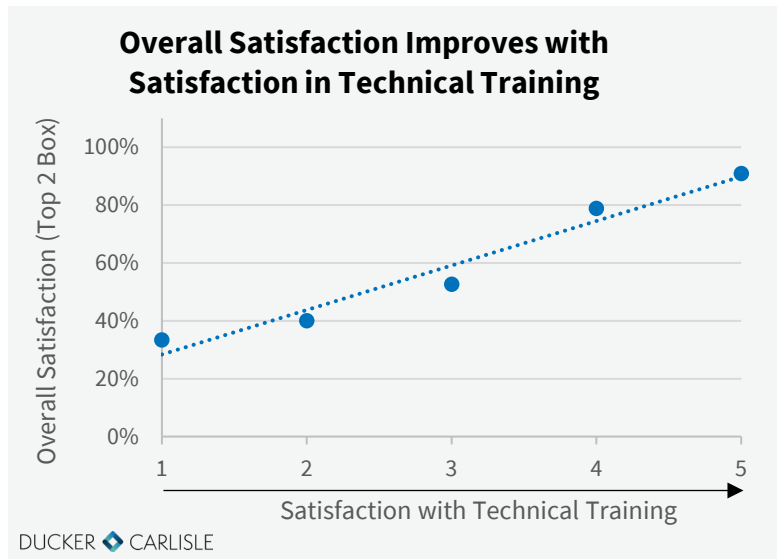
Provide clear and transparent career opportunity roadmaps
Clearly outline different job levels, training requirements, and salaries available within your shop and help techs reach their goals. Don't be afraid to provide paths beyond that of the standard technician in your shop – supporting techs in long-term career goals will go a long way for morale

Foster a supportive shop culture
Remember that sometimes small things go a long way in demonstrating you care and that your techs are a valued part of your organization

Technical Training

Providing adequate training opportunities for technicians is critical to their overall satisfaction and long-term success. Again, we see a clear correlation between a technician’s satisfaction with training and their overall satisfaction level. 91% of techs who are “very satisfied” with training are overall satisfied, compared to just 33% of techs who are dissatisfied with their training.

Unfortunately, collision techs are on average less satisfied with their technical training than their dealer service tech counterparts. Technical training is also the second-most selected improvement area, just behind special tools and equipment. What is causing this gap in the industry?



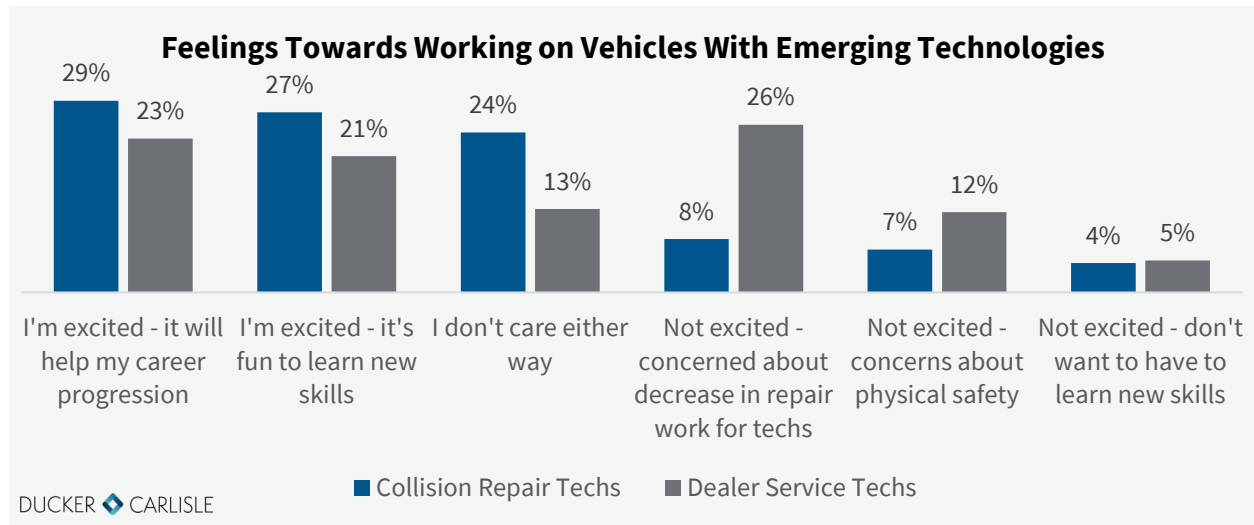
Investing in training opportunities is an important way for shops to demonstrate that they value their technicians and want to provide strong growth and career paths. Of course, improved training offerings also benefit the shop as the shop gains a higher skilled workforce – it’s a win-win.

Takeaways & Recommendations

- Take stock of the training your technicians receive**
Ensure your technicians understand all the trainings they need to take to maintain certifications as well as advance in their careers
- Provide support for technicians to complete training**
Help with financial costs, give time off, provide mentorship – full support to ensure they can complete trainings without any additional burdens

New Technology

Overall, collision techs are excited about the opportunity to work on emerging vehicle technologies, such as EVs. Feelings toward these new technologies range from skepticism to excitement. Overall, over half of collision techs fall into the “excited” bucket – they look forward to the opportunity to work with these technologies and advance their skills and career. This is somewhat in contrast to their dealer service tech counterparts, who have a sizable group more concerned about how these new technologies will impact their job.



Additionally, the overwhelming majority of collision technicians surveyed have the opportunity to work on new vehicle technology in their current role. This is likely much higher than the average dealer service technician, who doesn’t always have early access to the latest models that collision techs do. Collision shops can take advantage of this difference when recruiting new techs – by highlighting that working in the collision space will provide the best chance to work on the latest tech right away. At the same time, shops need to ensure they are providing proper training, tools, and equipment to safely work on this new technology. Special Tools & Equipment and Technical Training were the top-two cited areas of improvement by technicians, implying there may be some techs out there who feel they’re unequipped to work on this technology – an issue that needs to be addressed.

90% of responding techs work at repair facilities **conducting repairs on vehicles with emerging technologies** such as EVs and ADAS

DUCKER  CARLISLE

Takeaways & Recommendations

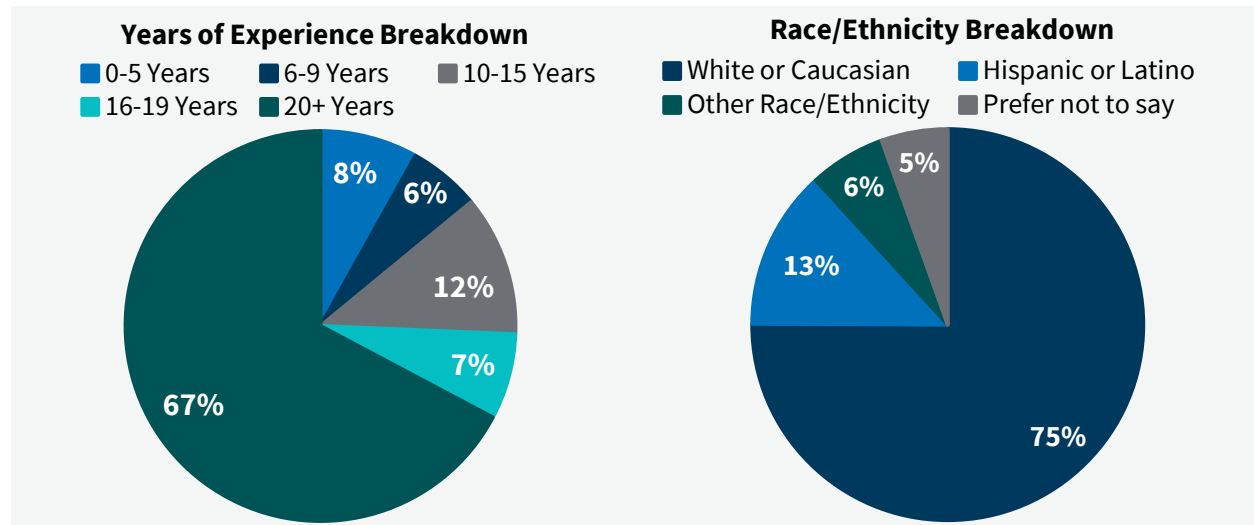
Communicate benefits of new technology with the team
Share thoughts into the future of the industry, career, and opportunities technicians may have to alleviate any concerns

Highlight new emerging tech with recruits
Capitalize on the excitement around the overall industry and new technology developments to get new recruits in the door

Appendix: Respondent Demographics

Survey respondents were overwhelmingly white, male, and middle-aged. This is very consistent with dealer service technicians, who also overwhelmingly skew in this demographic. However, respondents with just 0-5 years of total experience are younger and significantly more diverse. This indicates a potential trend toward growing diversity in the industry. Recruitment efforts should continue to engage with these underrepresented populations to help fill the gap in the technician population vs. the current need.

Demographics: All Respondents		Demographics: Respondents with 0-5 Years of Total Experience	
75%	White	50%	White
97%	Male	89%	Male
40-50	Average age	29	Average age



While most respondents that responded were white (75%), we saw strong representation from Hispanic or Latino technicians (13%). Compared to our dealer service tech survey, there were significantly more white respondents (75% vs. 69% among dealers) and less Asian respondents (1% vs. 4% among dealers). Most technicians who responded to the survey are quite tenured with 20+ years of experience.

We received good response coverage both in terms of facility type and geographic diversity. Most survey responses came from independent shops (47%), followed by MSOs (30%) and dealers (20%). The technicians surveyed represented nearly every US state, with California, Texas, Florida, and Illinois receiving the most coverage, as expected.

