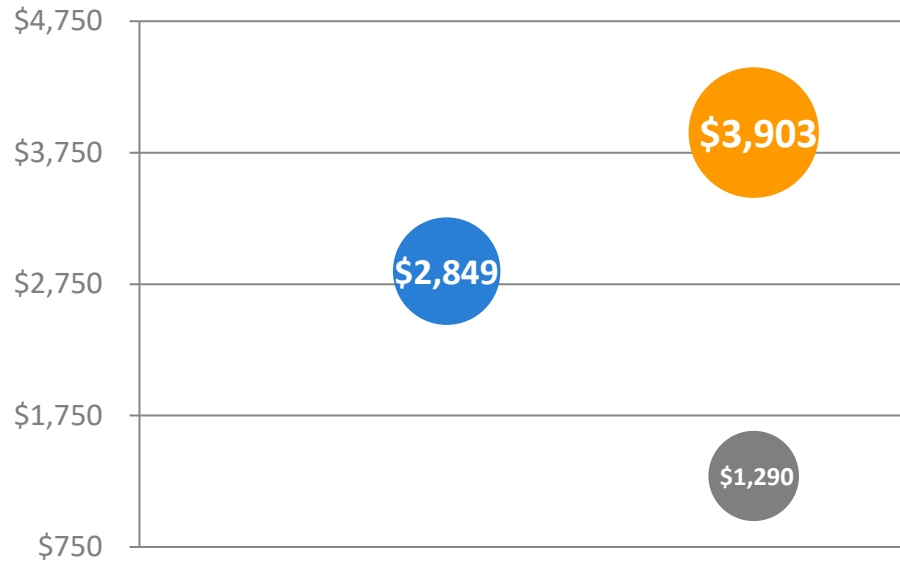




2020 Canadian Benchmark Report

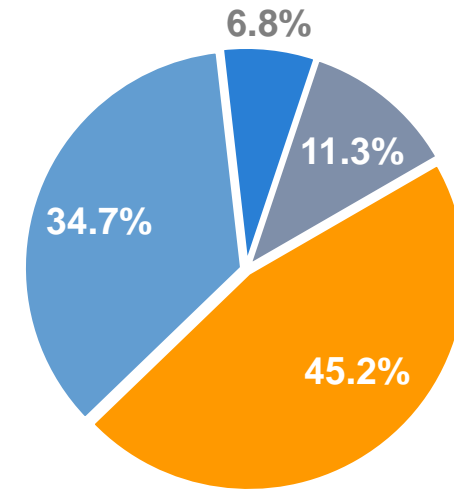
SALES

Average Sale



- All payer types increase ▲ 0.9% vs 2019
- Customer Pay increase ▲ 3.1% vs 2019
- Non-Customer Pay increase ▲ 5.4% vs 2019

Average Sale Mix



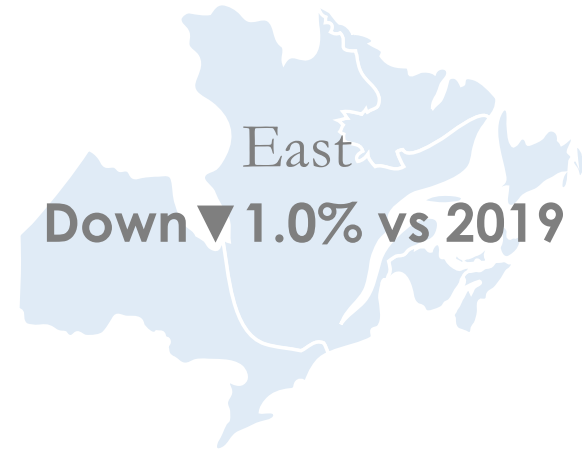
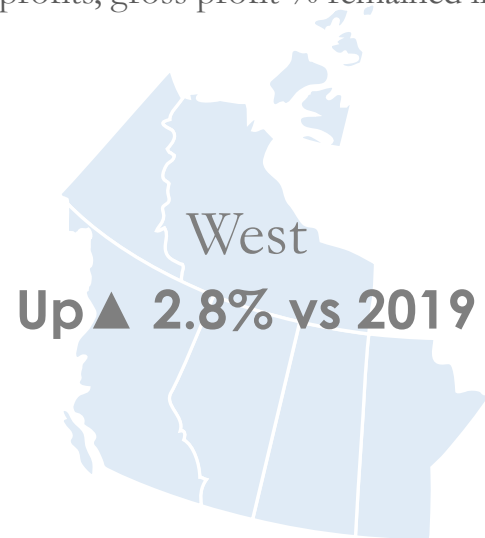
- Labour % decrease ▼ 0.3% vs 2019
- Parts % decrease ▼ 1.5% vs 2019
- Sublet % increase ▲ 8.2% vs 2019
- Materials % decrease ▼ 0.7% vs 2019

GROSS PROFIT TREND

Year over Year

Up ▲ 0.5% vs 2019

Overall gross profit, the direct cost attributed to performing a repair, rebounded in 2020 to a marginally higher level than last seen in 2018. Though the COVID-19 pandemic has had a devastating impact on industry net profits, gross profit % remained in line with prior year results.



When comparing GP% in eastern and western Canada, the western provinces trended upward in 2020 vs both 2019 and 2018. This year's overall GP% in the west came more in line with the averages we've seen historically in the east. The east trended down slightly but has not fluctuated outside the historical normal range.

Trend by Profit Centre



Labour ▲ 1.1%



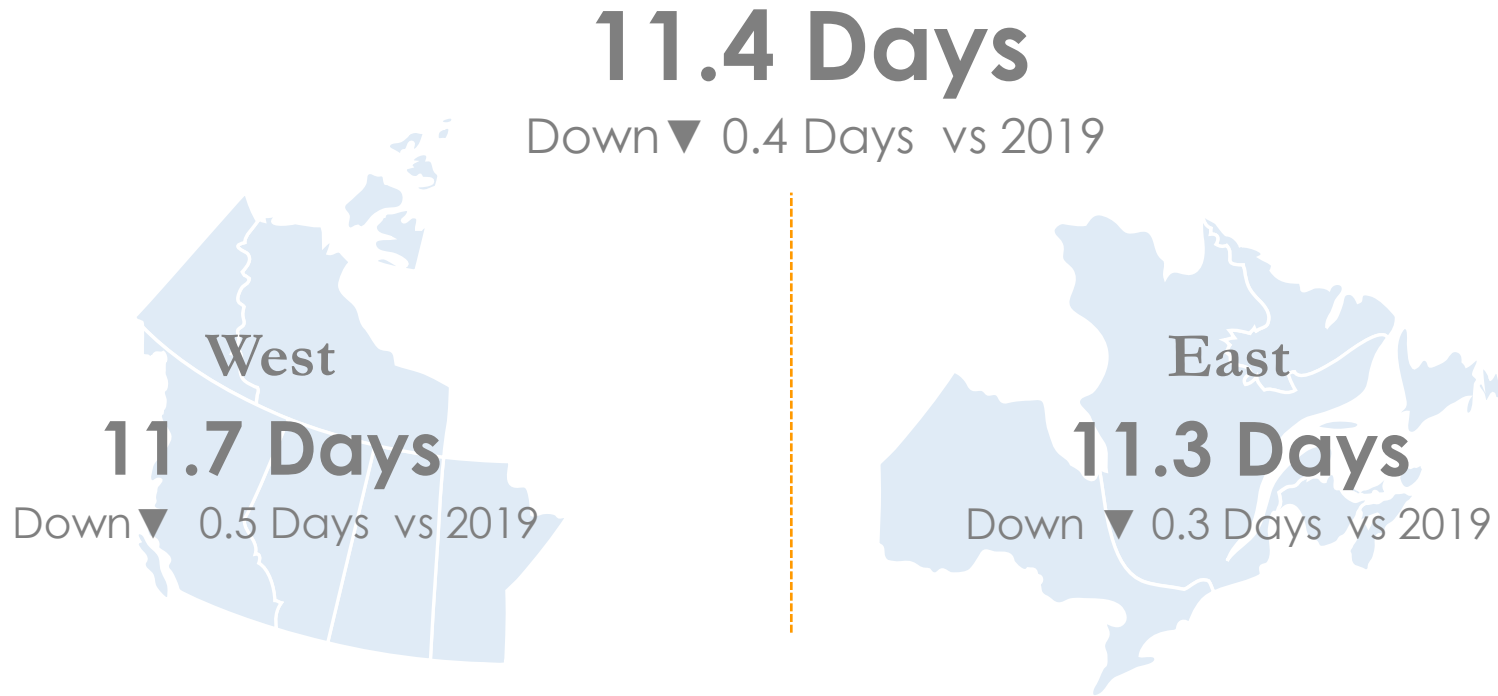
Parts ▼ 0.4%



Sublet ▲ 1.7%

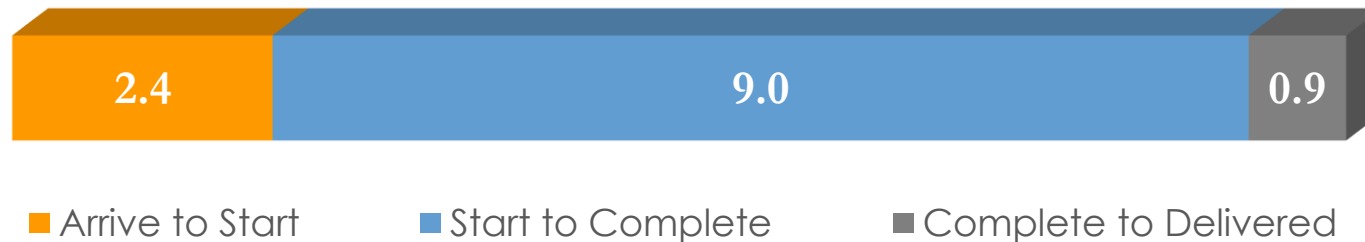
CYCLE TIME

Keys to Keys



Top 10%
6.1 Days

Avg Cycle Time Breakdown



TOUCH TIME

Avg Hours per Day

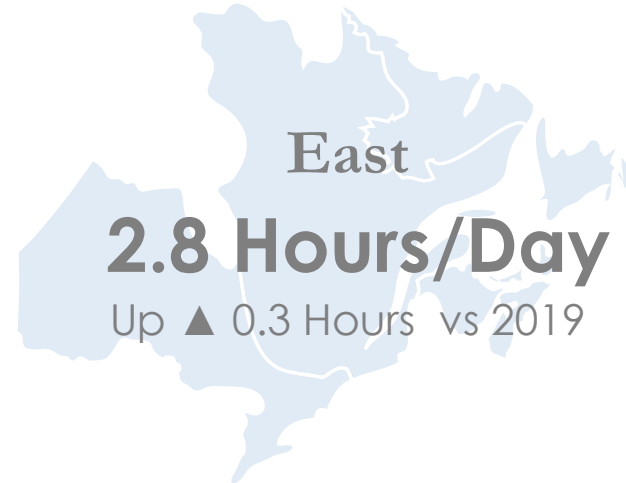
2.7 Hours/Day

Up ▲ 0.2 Hours vs 2019



2.6 Hours/Day

Up ▲ 0.3 Hours vs 2019



2.8 Hours/Day

Up ▲ 0.3 Hours vs 2019



Top 10%

4.0 Hours/Day

By Manufacturer Origin

	Avg Touch	Avg RO Hours
Domestic	2.7	24.4
Asian	2.7	22.0
European	2.5	24.2



SUMMARY & DEFINITIONS

About this Report

This benchmark is derived from Canadian collision repair locations' operational data. Data has been normalized and variance thresholds have been applied to eliminate anomalies that may impact data integrity; AutoHouse has applied its best efforts in statistical validation.

Definitions:

Sales: Average RO sales \$ (excluding tax)

Gross Profit: Overall RO Gross Profit % (Total Sales minus Direct Cost of Repairs)

Cycle Time: Arrival to delivery (keys to keys in calendar days/non-customer pay only)

Touch Time: Average daily hours of production time spent per RO (calendar days/non-customer pay only)

About Us

Based in Vancouver, BC, Canada, AutoHouse is the leading provider of performance centered Business Intelligence solutions to world class collision repairers and their business stakeholders. To learn more about AutoHouse and its industry leading Business Intelligence platform visit:



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