

# ***COLLISION REPAIR***

**Demand Analysis  
2020**



**MINNESOTA STATE**  
Transportation Center of Excellence



**RealTime Talent**  
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# Introduction and Sector Overview

This report highlights the importance of the Collision Repair career pathway for Minnesota's Transportation Industry. Professionals in Collision Repair work in diverse roles from autobody repairers and glass installers to autobody painting, serving industries as diverse as Navigational Manufacturing and Automobile Dealerships. In all, about 6,880 people work in Collision Repair roles in Minnesota as of the second quarter of 2020.

Over the next 5 years, total employment in Minnesota is projected to expand by about 49,053 jobs under official baseline forecasts to model growth beyond the initial impacts of COVID-19, or up to 89,792 in an optimistic outlook that estimates moderate economic recovery by late 2023. During this time frame, growth in Collision Repair jobs is anticipated to grow moderately by up to 153 total jobs. Total demand for Collision Repair talent is anticipated to be around 3,732 professionals needed to fill positions due to job exits and transfers, such as retirements and job changes.

Transportation Pathways in Minnesota - COVID, 2020Q2<sup>1</sup>

Occupation	Current						5-Year History		5-Year Forecast				
	Empl	Avg Ann Wages <sup>2</sup>	LQ	Unempl	Unempl Rate	Online Job Ads <sup>3</sup>	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
Automotive Technology Pathway	21,959	\$60,100	1.00	722	3.2%	870	1,057	1.0%	9,454	2,679	6,847	-71	-0.1%
Collision Repair Pathway	6,880	\$46,200	1.11	371	5.2%	280	-165	-0.5%	3,732	1,061	2,519	153	0.4%
Aviation Pathway	6,377	\$94,000	0.92	157	2.5%	55	211	0.7%	3,253	868	2,158	228	0.7%
Marine and Power Sports Pathway	5,354	\$40,900	1.10	367	6.6%	47	319	1.2%	3,274	997	2,215	62	0.2%
Diesel Equipment and Truck Pathway	13,249	\$54,600	1.15	559	4.2%	396	-71	-0.1%	6,861	1,996	4,558	307	0.5%
Truck Driving Pathway	99,222	\$43,000	1.00	4,799	4.8%	6,250	5,015	1.0%	61,110	23,917	34,411	2,783	0.6%
<b>Total - All Occupations</b>	<b>3,012,855</b>	<b>\$56,600</b>	<b>1.00</b>	<b>140,926</b>	<b>4.6%</b>	<b>155,869</b>	<b>48,618</b>	<b>0.3%</b>	<b>1,819,042</b>	<b>661,016</b>	<b>1,068,234</b>	<b>89,792</b>	<b>0.6%</b>

Source: [JobsEQ®](#)

Data as of 2020Q2 unless noted otherwise

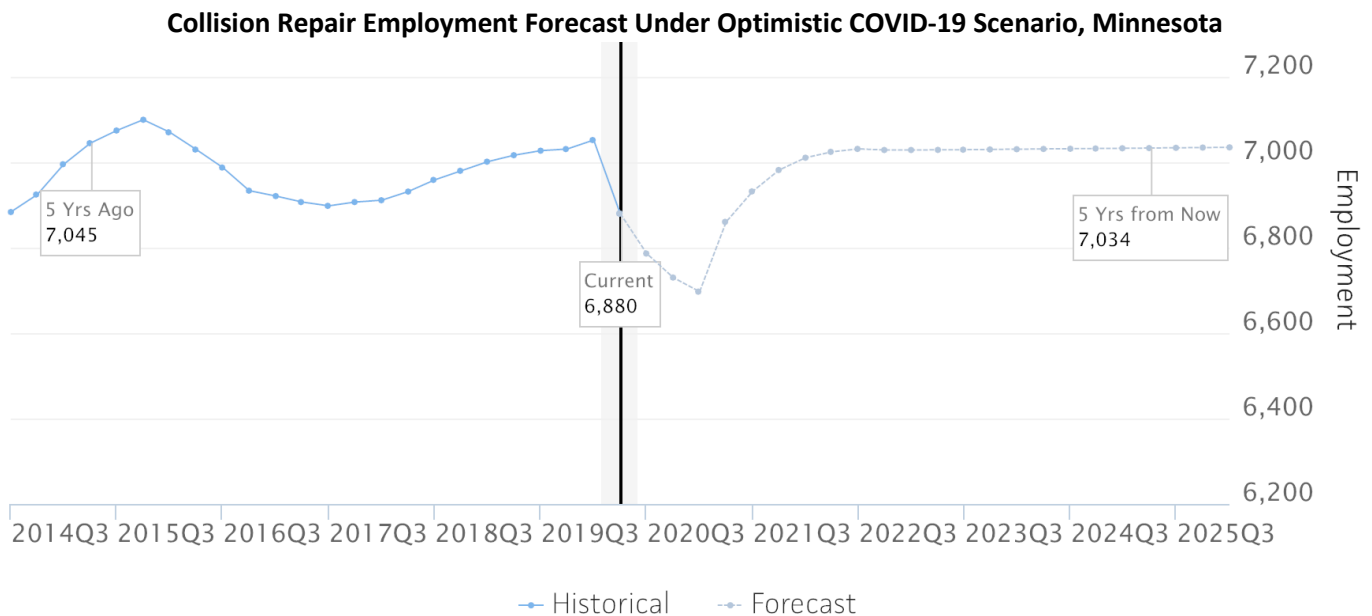
Note: Figures may not sum due to rounding.

1. Data based on a four-quarter moving average unless noted otherwise.

2. Wage data are as of 2019 and represent the average for all Covered Employment

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As Minnesota looks to the future recovery from the pandemic's heavy blow to our economy and public health, forecasts made today may look very different from realities seen in years to come. Supply chain impacts, the drive to automation and technological innovation mean that the transportation industry, in particular, may look very different in five years from what it looks like today. The compounding impacts of a tight labor market prior to the start of the pandemic and significant, rapid layoffs of non-essential workers across service industry positions creates a complex landscape of employer demand and an available workforce. Forecasting future needs under current conditions with an eye to anticipated talent pipelines into Collision Repair suggest that there may be shortages of talent in several occupations of this career pathway unless more talent decides to enter the field.

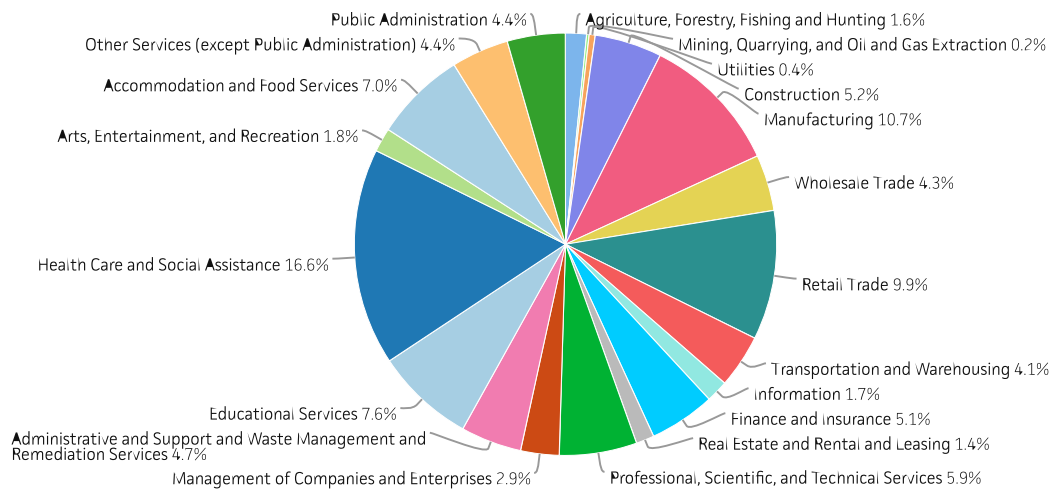


Source: JobsEQ®, Data as of 2020Q2, The shaded areas of the graph represent national recessions.

# Industry/Occupation Mix

The largest industry in Minnesota is Health Care and Social Assistance, employing 500,608 workers. The next-largest industries in the region are Manufacturing (323,587 workers) and Retail Trade (298,251). Industries in Minnesota with the highest average wages per worker are Management of Companies and Enterprises (\$127,764), Utilities (\$113,213), and Finance and Insurance (\$108,049). Regional industries with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+28,897 jobs), Professional, Scientific, and Technical Services (+15,102), and Transportation and Warehousing (+13,687).

Total Workers for Minnesota by Industry



NAICS	Industry	Current			5-Year History		5-Year Forecast				
		Empl	Avg Ann Wages	LQ	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
62	Health Care and Social Assistance	500,608	\$55,109	1.14	28,897	1.2%	274,539	119,208	123,230	32,101	1.3%
31	Manufacturing	323,587	\$68,280	1.30	2,136	0.1%	153,273	60,975	104,408	-12,109	-0.8%
44	Retail Trade	298,251	\$31,708	0.97	-6,491	-0.4%	194,732	87,450	110,495	-3,213	-0.2%
61	Educational Services	229,169	\$51,171	0.93	4,567	0.4%	109,648	51,226	55,274	3,147	0.3%
72	Accommodation and Food Services	211,482	\$21,617	0.84	-13,014	-1.2%	181,949	76,946	96,911	8,092	0.8%
54	Professional, Scientific, and Technical Services	178,834	\$94,855	0.86	15,102	1.8%	87,704	29,033	49,147	9,524	1.0%
23	Construction	155,232	\$66,499	0.89	11,053	1.5%	84,336	27,816	49,767	6,753	0.9%
52	Finance and Insurance	152,296	\$108,049	1.24	10,280	1.4%	72,480	26,947	44,238	1,294	0.2%
56	Administrative and Support and Waste Management and Remediation Services	140,485	\$42,665	0.74	-5,819	-0.8%	84,945	34,586	47,177	3,182	0.4%
92	Public Administration	133,826	\$60,783	0.92	6,357	1.0%	60,075	25,862	35,190	-978	-0.1%
81	Other Services (except Public Administration)	132,398	\$31,779	1.00	-3,589	-0.5%	75,430	34,356	41,016	58	0.0%
42	Wholesale Trade	129,293	\$85,494	1.12	-5,695	-0.9%	65,121	25,321	41,964	-2,164	-0.3%

Source: RealTime Talent analysis of Chmura Economics JobsEQ®, <http://www.chmuraecon.com/jobseq>

Gartner TalentNeuron Recruit Job posting data 11/1/2019 – 10/31/2020

[https://www.wantedanalytics.com/wa/counts?country=US&exclude=anonymous%2Cduplicates%2Cbulk%2Cexpired&jloc=state-24&jocc=493023%2C172141%2C493031%2C119041%2C493042%2C493021%2C536031%2C493041%2C172072%2C173027%2C492093%2C17302907%2C493022%2C172131%2C492096&methodology=new&require=&saved\\_search\\_id=61739&t%5Btimeframe%5D=f2019-11-01-2020-10-31&timeframe=f2019-11-01-2020-10-31&saved\\_search\\_id=jocc=519121,493021,493022&restrict=&exclude=anonymous,duplicates,bulk,expired](https://www.wantedanalytics.com/wa/counts?country=US&exclude=anonymous%2Cduplicates%2Cbulk%2Cexpired&jloc=state-24&jocc=493023%2C172141%2C493031%2C119041%2C493042%2C493021%2C536031%2C493041%2C172072%2C173027%2C492093%2C17302907%2C493022%2C172131%2C492096&methodology=new&require=&saved_search_id=61739&t%5Btimeframe%5D=f2019-11-01-2020-10-31&timeframe=f2019-11-01-2020-10-31&saved_search_id=jocc=519121,493021,493022&restrict=&exclude=anonymous,duplicates,bulk,expired)

NAICS	Industry	Current			5-Year History		5-Year Forecast				
		Empl	Avg Ann Wages	LQ	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
48	Transportation and Warehousing	123,264	\$55,195	0.87	13,687	2.4%	66,808	27,963	37,839	1,006	0.2%
55	Management of Companies and Enterprises	88,576	\$127,764	1.90	9,653	2.3%	41,604	14,844	25,335	1,426	0.3%
71	Arts, Entertainment, and Recreation	55,324	\$35,821	0.99	-2,550	-0.9%	40,504	17,557	21,685	1,262	0.5%
51	Information	50,849	\$81,466	0.85	-7,182	-2.6%	23,453	8,762	15,536	-845	-0.3%
11	Agriculture, Forestry, Fishing and Hunting	48,479	\$49,439	1.19	-2,442	-1.0%	24,433	11,010	14,848	-1,425	-0.6%
53	Real Estate and Rental and Leasing	41,580	\$57,134	0.79	-4,646	-2.1%	21,988	9,638	11,543	807	0.4%
22	Utilities	13,528	\$113,213	0.86	-975	-1.4%	5,585	2,173	3,828	-415	-0.6%
21	Mining, Quarrying, and Oil and Gas Extraction	5,794	\$91,766	0.46	-711	-2.3%	2,900	956	1,984	-40	-0.1%
Total - All Industries		3,012,855	\$59,182	1.00	48,618	0.3%	1,701,217	706,144	946,020	49,053	0.3%

Source: [JobsEQ®](#)

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2019Q4 with preliminary estimates updated to 2020Q2. Forecast employment growth uses national projections adapted for regional growth patterns.

Collision Repair talent is primarily concentrated in the Automotive Repair and Maintenance industry (45.9%), but are important across a wide range of transportation, manufacturing, and agriculture sub-industries.

Top Industry Distribution for Collision Repair Pathway in Minnesota - COVID

		CURRENT			5-YEAR DEMAND			
NAICS Code	Industry Title	% of Occ Empl	Empl	Avg Ann Wages	Exits	Transfers	Empl Growth	Total Demand
8111	Automotive Repair and Maintenance	45.9%	3,159	\$49,800	494	1,096	105	1,694
4411	Automobile Dealers	7.5%	514	\$49,100	81	169	0	251
3328	Coating, Engraving, Heat Treating, and Allied Activities	6.3%	430	\$36,300	65	171	8	244
3323	Architectural and Structural Metals Manufacturing	3.2%	223	\$43,000	34	90	6	130
3339	Other General Purpose Machinery Manufacturing	2.7%	183	\$43,000	27	72	-1	98
3331	Agriculture, Construction, and Mining Machinery Manufacturing	1.7%	119	\$43,000	18	47	0	64
3222	Converted Paper Product Manufacturing	1.6%	111	\$46,200	16	42	-5	53
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	1.5%	105	\$43,000	16	42	3	62
3399	Other Miscellaneous Manufacturing	1.4%	99	\$43,100	15	40	4	60
3362	Motor Vehicle Body and Trailer Manufacturing	1.4%	95	\$39,800	15	39	6	60
3391	Medical Equipment and Supplies Manufacturing	1.4%	94	\$43,000	14	38	3	55
5613	Employment Services	1.2%	80	\$37,500	13	33	7	53
3261	Plastics Product Manufacturing	1.2%	79	\$38,300	12	32	2	45
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	1.1%	78	\$48,700	12	26	0	38
3219	Other Wood Product Manufacturing	1.1%	77	\$36,600	11	30	0	41
3369	Other Transportation Equipment Manufacturing	1.0%	67	\$43,200	10	25	-3	32
3324	Boiler, Tank, and Shipping Container Manufacturing	0.9%	65	\$43,000	10	26	2	39
3329	Other Fabricated Metal Product Manufacturing	0.9%	64	\$43,000	10	26	1	36
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	0.9%	63	\$37,900	10	26	4	40
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	0.8%	55	\$43,000	8	21	0	29
n/a	All Others	16.3%	1,120	n/a	169	428	8	605
Source: JobsEQ® Data as of 2020Q2 except wages which are as of 2019. Note that occupation-by-industry wages represent adjusted national data and may not be consistent with regional, all-industry occupation wages shown elsewhere in JobsEQ. Note: Figures may not sum due to rounding.								

Source: RealTime Talent analysis of Chmura Economics JobsEQ®, <http://www.chmuraecon.com/jobseq>

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# Pathway Detail

Of all occupations found in the Collision Repair pathway, the specific occupations of Coating, Painting, and Spraying Machine Setters, Operators, and Tenders and Automotive Glass Installers and Repairers are uniquely concentrated in Minnesota to a higher degree than seen in the nation overall. On average, Collision Repair careers pay about \$46,200 per year—about \$10,400 less than the average wage statewide across all positions at all education and experience levels.

**Collision Repair Pathway in Minnesota - COVID, 2020Q2<sup>1</sup>**

SOC	Occupation	Current						5-Year History		5-Year Forecast				
		Empl	Avg Ann Wages <sup>2</sup>	LQ	Unempl	Unempl Rate	Online Job Ads <sup>3</sup>	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
51-9124	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	3,600	\$43,000	1.26	182	4.9%	127	-82	-0.4%	2,041	545	1,434	63	0.3%
49-3021	Automotive Body and Related Repairers	2,852	\$50,400	0.96	165	5.6%	126	-88	-0.6%	1,465	463	927	75	0.5%
49-3022	Automotive Glass Installers and Repairers	428	\$44,500	1.12	24	5.4%	27	5	0.2%	226	53	158	15	0.7%
	<b>Collision Repair Pathway</b>	<b>6,880</b>	<b>\$46,200</b>	<b>1.11</b>	<b>371</b>	<b>5.2%</b>	<b>280</b>	<b>-165</b>	<b>-0.5%</b>	<b>3,732</b>	<b>1,061</b>	<b>2,519</b>	<b>153</b>	<b>0.4%</b>
	<b>Total - All Occupations</b>	<b>3,012,855</b>	<b>\$56,600</b>	<b>1.00</b>	<b>140,926</b>	<b>4.6%</b>	<b>124,655</b>	<b>48,618</b>	<b>0.3%</b>	<b>1,819,042</b>	<b>661,016</b>	<b>1,068,234</b>	<b>89,792</b>	<b>0.6%</b>

Source: [JobsEQ®](#)

Data as of 2020Q2 unless noted otherwise

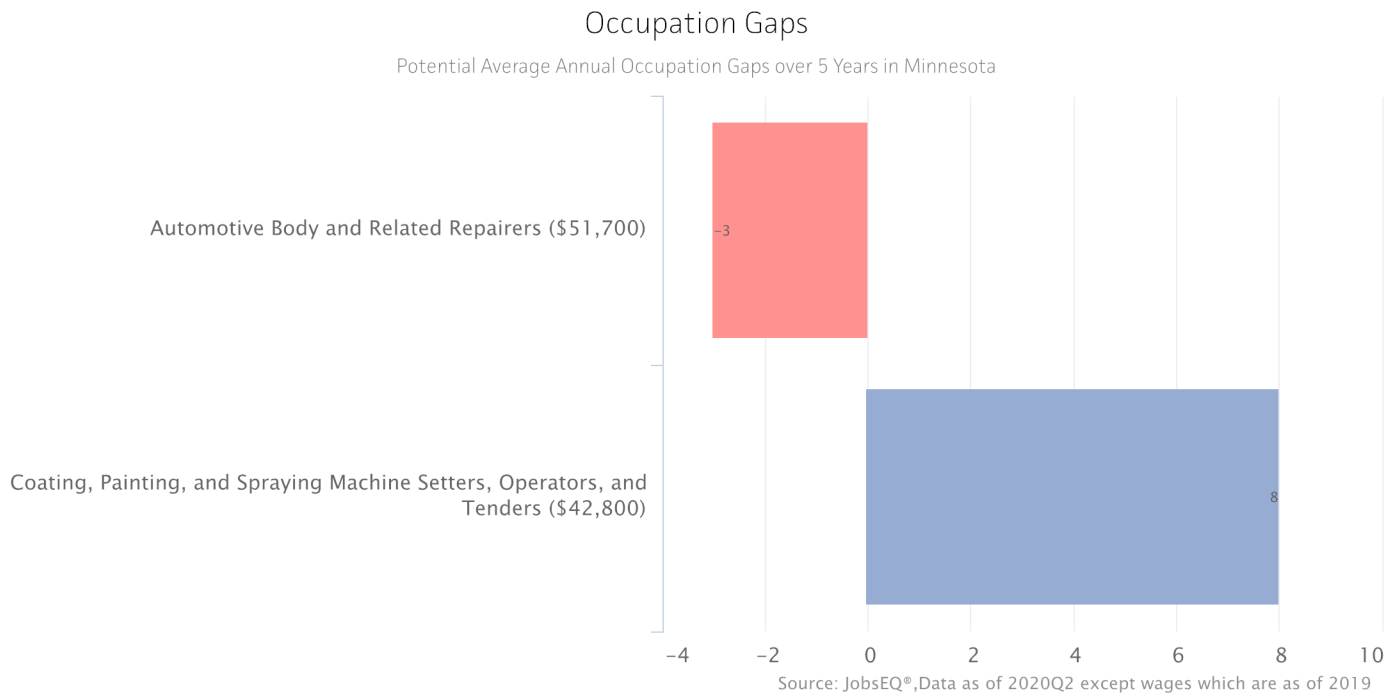
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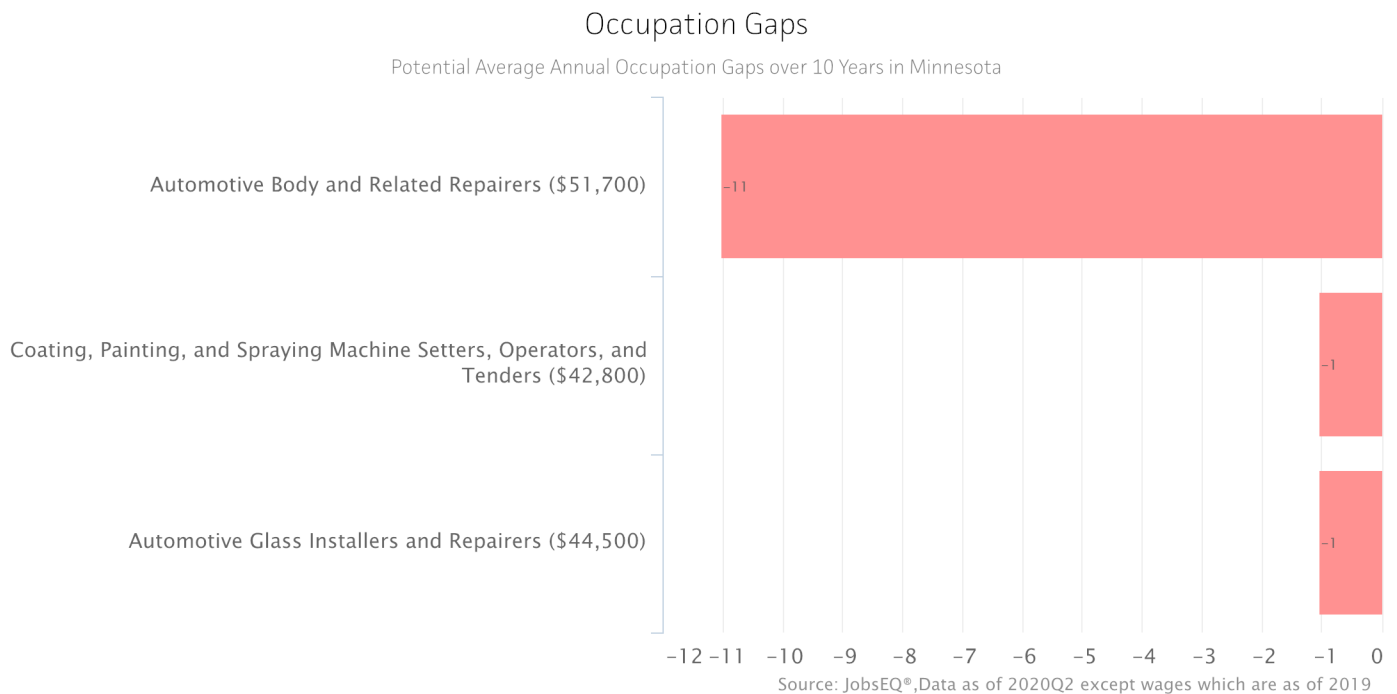
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By 2025, Minnesota may have a shortage of Automotive Body Repairers (shown in red below) and a surplus of Autobody Painters.



However, looking out the next ten years, all occupations in the Collision Repair pathway are anticipated to experience talent shortages.

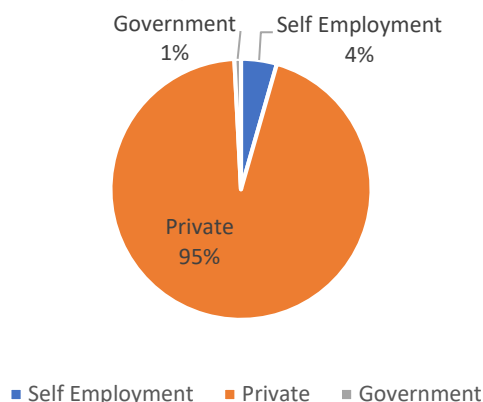




# Employment Types

About 95% of people employed in Collision Repair in Minnesota work for private employers, while an estimated 4% are self-employed. The remaining 1% work for state, federal, or local government entities.

Employment Types, Minnesota 2020Q2



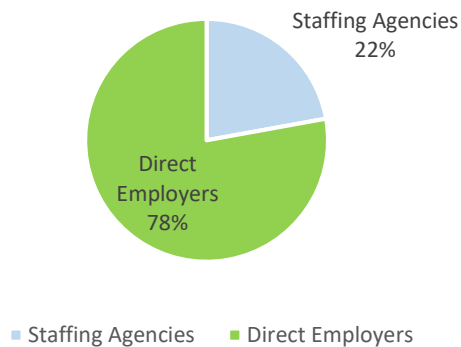
## Job Posting Trends

Data in this section focuses on jobs newly advertised between November 1, 2019 and October 31, 2020 in Collision Repair roles across Minnesota. All data in this section comes from Gartner TalentNeuron. Overall, there were 885 new jobs advertised in Collision Repair during this time frame, a decline of almost 25% from the prior 12-month period.

### Top Employers by Volume of New Job Postings, With Change from Prior Year

1. Caliber Collision Centers: 143 (+4%)
2. ABRA Auto Body and Glass: 63 (-66%)
3. Safelite Autoglass: 59 (-21%)
4. J.N. Phillips Glass: 50 (+2,400%)
5. Express Employment Professionals: 37 (-8%)
6. Aerotek: 33 (+38%)
7. Carvana: 23 (0%)
8. Pro Staff: 19 (-52%)
9. Walser Collision and Glass: 16 (+33%)
10. Twin City Staffing: 15 (+275%)

## New Job Postings Advertised in Minnesota by Employer Type



## Top Skills by Volume of New Job Postings, With Change from Prior Year

1. Dedication (-30%)
2. Customer Service (-15%)
3. Lifting (-4%)
4. Communication (+14%)
5. Compliance (+2%)
6. Welding (+13%)
7. Multitasking (+38%)
8. Scheduling (-27%)
9. Friendliness (+24%)
10. Quality-Driven (+23%)

## Top Certifications by Volume of New Job Postings, With Change from Prior Year

1. Class D Driver's License (-22%)
2. Auto Glass Technician (-24%)
3. Automotive Service Excellence (-41%)
4. OSHA (-26%)
5. I-CAR (-67%)

## Top Sites Used by Volume of New Job Postings, With Change from Prior Year

1. The Job Network (-13%)
2. Indeed (+10%)
3. Snag (+69%)
4. Corporate Site (-8%)
5. MinnesotaWorks (-32%)

Source: RealTime Talent analysis of Chmura Economics JobsEQ®, <http://www.chmuraecon.com/jobseq>

Gartner TalentNeuron Recruit Job posting data 11/1/2019 – 10/31/2020

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# FAQ

## What is a location quotient?

A location quotient (LQ) is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

## What is separation demand?

Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. The total projected demand for an occupation is the sum of the separation demand and the growth demand (which is the increase or decrease of jobs in an occupation expected due to expansion or contraction of the overall number of jobs in that occupation).

## What is a cluster?

A cluster is a geographic concentration of interrelated industries or occupations. If a regional cluster has a location quotient of 1.25 or greater, the region is considered to possess a competitive advantage in that cluster.

## What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.

## What is NAICS?

The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS Code comprises six levels, from the “all industry” level to the 6-digit level. The first two digits define the top level category, known as the “sector,” which is the level examined in this report.

## What is SOC?

The Standard Occupational Classification system (SOC) is used to classify workers into occupational categories. All workers are classified into one of over 804 occupations according to their occupational definition. To facilitate classification, occupations are combined to form 22 major groups, 95 minor groups, and 452 occupation groups. Each occupation group includes detailed occupations requiring similar job duties, skills, education, or experience.

## Who created this report?

This report was developed by RealTime Talent for the Transportation Center of Excellence. If you have questions about the data found in this report, or are interested in learning more, please contact Research Strategist Erin Olson at [erin@realtimetalentmn.org](mailto:erin@realtimetalentmn.org) or visit the RealTime Talent website at [www.realtimetalent.org](http://www.realtimetalent.org)