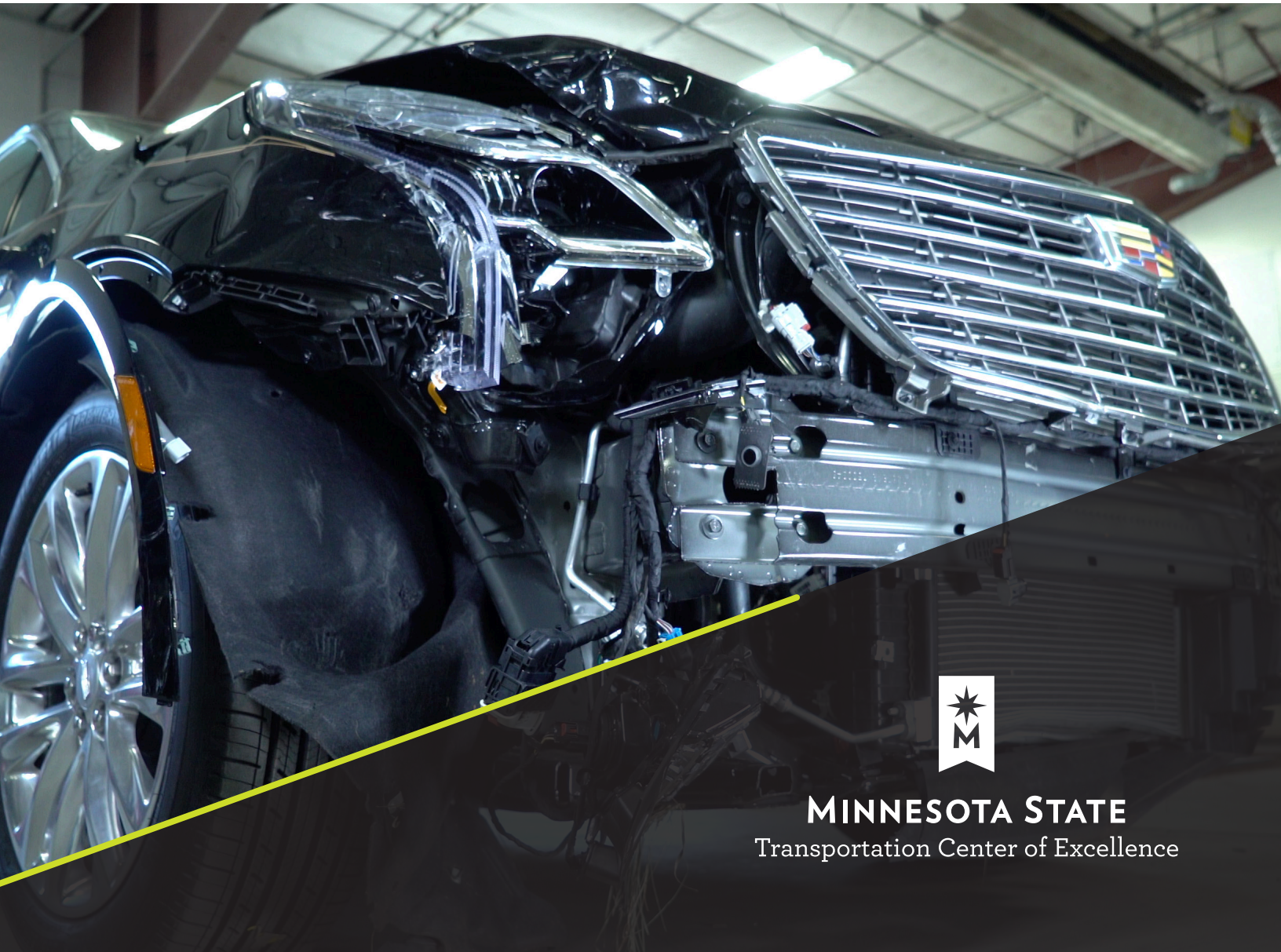


COLLISION REPAIR

Demand Analysis
2021



MINNESOTA STATE
Transportation Center of Excellence



**Developed for the Minnesota State
Transportation Center of Excellence
by RealTime Talent**

January 2022

Introduction and Sector Overview.....2

Industry/Occupation Mix4

Pathway Detail4

Employment Types7

Job Posting Trends7

 Top Employers by Volume of New Job Postings in 2021, With Change from Prior Year 8

 Top Skills by Volume of New Job Postings, With Change from Prior Year 9

 Top Knowledge Areas, Tools, and Tech by Volume of New Job Postings, With Change from Prior Year..... 9

 Top Certifications by Volume of New Job Postings, With Change from Prior Year 9

FAQ 10

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 6,864 people work in Collision Repair roles in Minnesota as of the second quarter of 2021—remaining flat (-16 workers) from a year prior.

Overall employment in Minnesota has declined by nearly -92,000 workers (-3.1%) between the second quarter of 2020 and 2021, and the five-year forecast dropped from 49,053 expansion of employment over five years to just 31,051 from 2021 through 2026 as of the most current baseline forecasts, or about 0.2% average annual growth. An optimistic forecast assuming reduction in labor force exits, economic conditions improving, and lessening impacts of COVID-19 on key industries forecasts up to 1.2% average annual growth over the next five years, or a total of 172,340 people newly employed by 2026. During this time frame, Collision Repair employment is anticipated to continue to remain stable in Minnesota, rising by just 2 total jobs (0.0% annually) due to a tight talent pool, but could grow by about 341 (1.0% annually) in an optimistic forecast model. Total baseline demand for Collision Repair talent is anticipated to be around 3,524 professionals needed to fill positions due to job exits and transfers, such as retirements and job changes.

Transportation Pathways in Minnesota – Baseline Forecast, 2021Q2¹

Occupation	Current						5-Year History		5-Year Baseline Forecast				
	Empl	Avg Ann Wages ²	LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
Automotive Technology Pathway	21,614	\$61,300	1.03	753	3.4%	1,263	163	0.2%	8,991	2,619	6,697	-324	-0.3%
Aviation Pathway*	8,773	\$122,300	0.88	346	3.9%	210	-674	-1.5%	3,844	1,121	2,688	35	0.1%
Collision Repair Pathway	6,864	\$46,900	1.14	324	4.6%	376	-307	-0.9%	3,524	1,042	2,480	2	0.0%
Diesel Equipment and Truck Pathway	12,889	\$56,000	1.20	344	2.7%	487	-451	-0.7%	6,292	1,919	4,383	-10	0.0%
Marine and Power Sports Pathway	5,181	\$41,900	1.07	373	6.8%	58	80	0.3%	3,109	963	2,131	15	0.1%
Truck Driving Pathway	95,261	\$44,600	0.96	6,493	6.60%	8,796	-843	-0.2%	57,082	22,543	33,247	1,293	0.3%
Transportation Occupations	147,533	\$51,600	0.99	8,573	5.6%	11,284	-1,891	-0.3%	81,732	29,859	50,858	1,015	0.1%
Total - All Occupations	2,920,850	\$58,900	1.00	145,886	4.9%	181,745	-83,089	-0.6%	1,672,986	625,772	1,016,164	31,051	0.2%

*This pathway includes Drone Technology careers as of 2021, which were not included in the 2020 estimates of career pathway employment or demand.

Source: [JobsEQ®](#)

Data as of 2021Q2 unless noted otherwise

Note: Figures may not sum due to rounding.

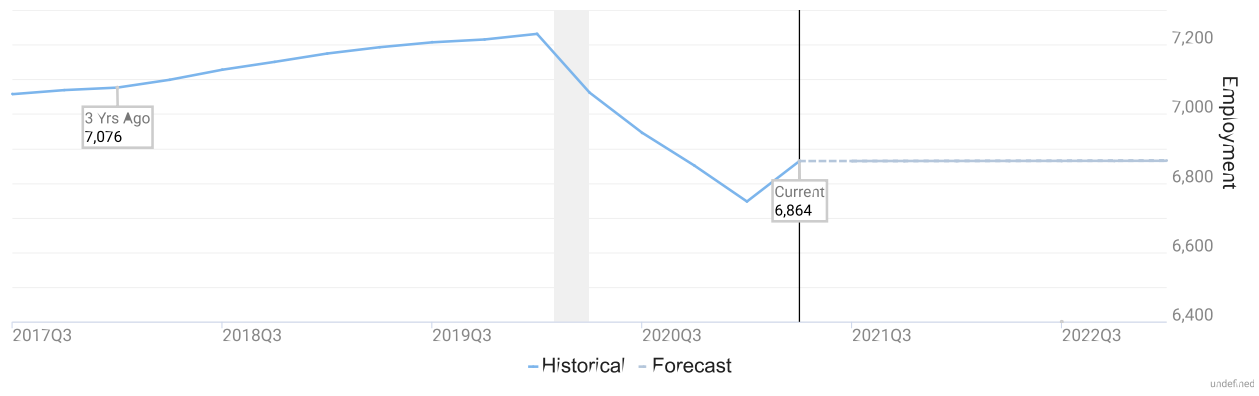
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2. Wage data are as of 2020 and represent the average for all Covered Employment

3. Data represent found online ads active within the last thirty days in the selected region; data represents a sampling rather than the complete universe of postings. Ads lacking zip code information but designating a place (city, town, etc.) may be assigned to the zip code with greatest employment in that place for queries in this analytic. Due to alternative county-assignment algorithms, ad counts in this analytic may not match that shown in RTI (nor in the popup window ad list).

As Minnesota’s economy continues to sustain loss of workers due to the pandemic and overall talent shortage, and with unknown ongoing impacts of the COVID-19 pandemic on our economy and public health, employment forecasts are changing rapidly. 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 across a large share of occupations in this career pathway unless more talent decides to enter the field. The pathway forecast has soured since estimates in late 2020, with overall employment remaining flat through the second quarter of 2026.

Collision Repair Employment Forecast Under Baseline Scenario, Minnesota



Industry/Occupation Mix

Collision Repair talent is primarily concentrated in the Automotive Repair and Maintenance industry (46.4%), increasing in its concentration from estimates in 2020 by 0.5 percentage points. The next highest industry of employment concentration is Automobile Dealers (7.5%), followed by general Coating, Engraving, Heat Treating, and Allied Activities as well as Architectural and Structural Metals Manufacturing employers.

Top Industry Distribution for Collision Repair Pathway Occupations in Minnesota

NAICS Code	Industry Title	CURRENT			5-YEAR DEMAND			
		% of Occ Empl	Empl	Avg Ann Wages	Exits	Transfers	Empl Growth	Total Demand
8111	Automotive Repair and Maintenance	46.4%	3,184	\$50,600	487	1,086	13	1,586
4411	Automobile Dealers	7.5%	512	\$49,600	81	169	2	252
3328	Coating, Engraving, Heat Treating, and Allied Activities	5.9%	406	\$37,100	61	160	0	220
3323	Architectural and Structural Metals Manufacturing	3.1%	215	\$43,700	33	87	5	125
3339	Other General Purpose Machinery Manufacturing	2.6%	178	\$43,700	27	70	0	97
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	1.8%	124	\$43,700	18	48	-2	65
5613	Employment Services	1.7%	114	\$37,600	17	44	1	63
3331	Agriculture, Construction, and Mining Machinery Manufacturing	1.6%	111	\$43,700	17	44	-1	59
3222	Converted Paper Product Manufacturing	1.6%	109	\$47,500	16	41	-5	51
3362	Motor Vehicle Body and Trailer Manufacturing	1.5%	105	\$41,200	16	41	-1	55
3399	Other Miscellaneous Manufacturing	1.5%	102	\$43,700	16	41	3	59
3219	Other Wood Product Manufacturing	1.4%	95	\$37,700	14	36	-3	47
3391	Medical Equipment and Supplies Manufacturing	1.3%	90	\$42,300	14	36	1	51
4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	1.3%	89	\$48,400	13	29	-2	40
3261	Plastics Product Manufacturing	1.1%	72	\$39,600	11	28	-1	37
3329	Other Fabricated Metal Product Manufacturing	1.0%	68	\$43,700	10	26	-2	34
3324	Boiler, Tank, and Shipping Container Manufacturing	0.9%	64	\$43,700	10	26	1	37
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	0.9%	60	\$38,400	9	25	3	37
3332	Industrial Machinery Manufacturing	0.8%	58	\$43,700	9	23	0	32
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	0.8%	57	\$43,700	9	23	0	31
n/a	All Others	15.3%	1,052	n/a	157	396	-16	538

Source: JobsEQ®
 Data as of 2021Q2 except wages which are as of 2020. 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.

Pathway Detail

Of the three occupations found in the Collision Repair pathway, Coating, Painting, and Spraying Machine Setters, Operators, and Tenders are uniquely concentrated in Minnesota to a higher degree than seen in the nation overall. On average, Collision Repair careers pay about \$46,900 per year (up from \$46,200 last year)—about \$12,000 below than the average wage statewide across all positions.

Collision Repair Pathway in Minnesota – Baseline Forecast, 2021Q2¹

SOC	Occupation	Current						1-Year History		5-Year Baseline Forecast				
		Empl	Avg Ann Wages ²	LQ	Unempl	Unempl Rate	Online Job Ads ³	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
51-9124	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	3,557	\$43,700	1.30	162	4.4%	216	-126	-3.4%	1,921	532	1,400	-10	-0.1%
49-3021	Automotive Body and Related Repairers	2,816	\$51,400	0.99	131	4.5%	127	-74	-2.6%	1,374	452	905	17	0.1%
49-3022	Automotive Glass Installers and Repairers	490	\$44,400	1.08	31	5.9%	33	2	0.4%	229	58	175	-4	-0.2%
	Collision Repair Pathway	6,864	\$46,900	1.14	324	4.6%	376	-198	-2.8%	3,524	1,042	2,480	2	0.0%
	Total - All Occupations	2,920,850	\$58,900	1.00	145,886	4.9%	181,745	-91,909	-3.1%	1,672,986	625,772	1,016,164	31,051	0.2%

Source: [JobsEQ®](#)

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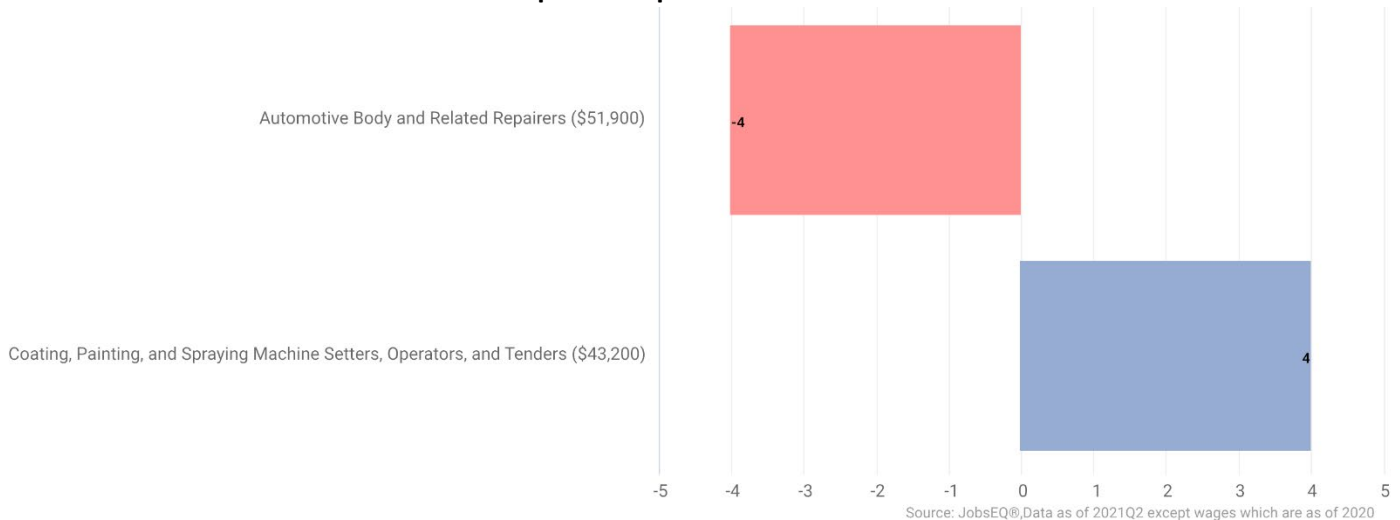
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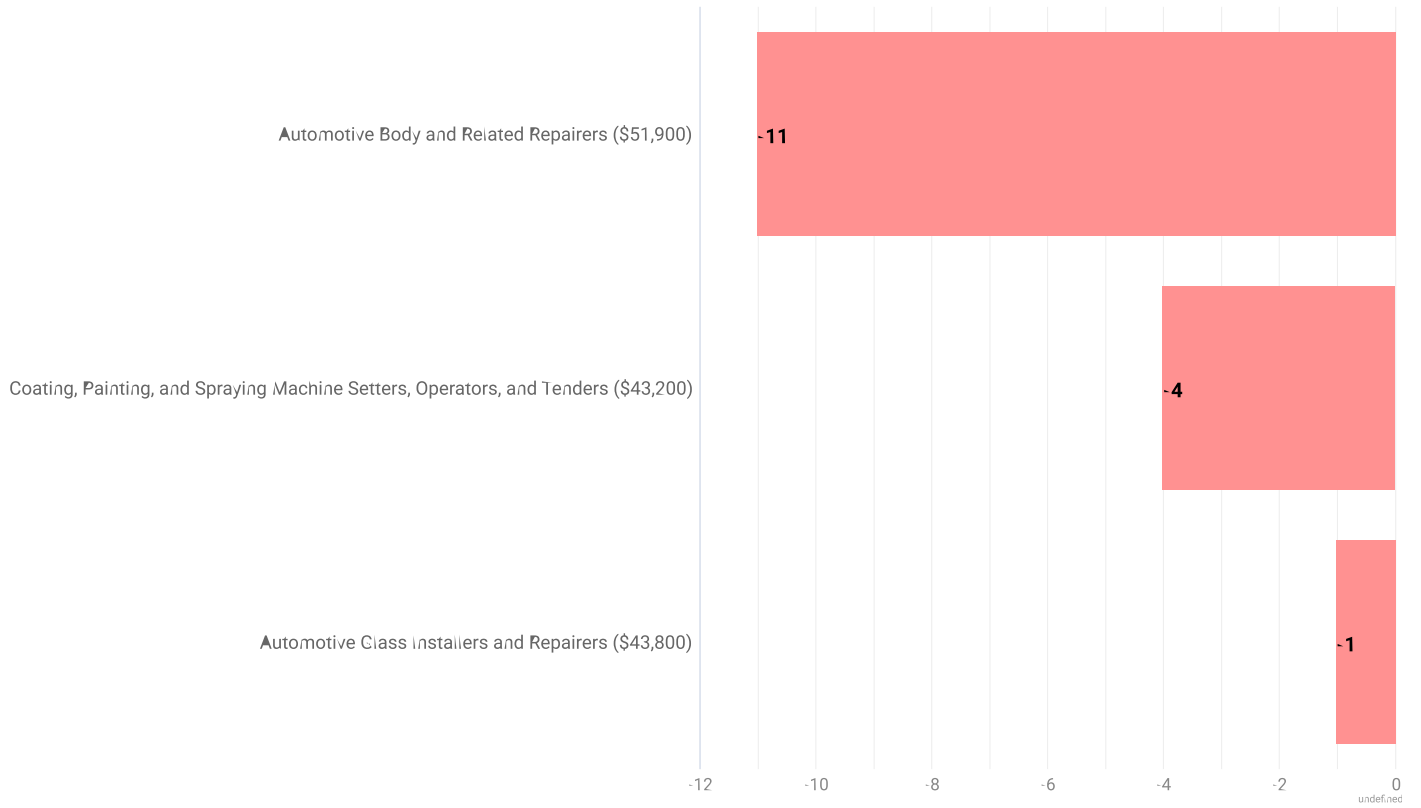
By 2026, it is likely that Minnesota will see a growing shortage of Auto Body Repairers (shown in red below). The estimated annual shortage of Auto Body Repairers have worsened since 2020 estimates.

Estimated Occupation Gaps over Five Years in Minnesota



Looking out the next ten years, all three occupations in the Collision Repair pathway are anticipated to experience talent shortages. The long-term shortage of Auto Body Repairers and Auto Glass Installers and Repairers have remained the same as estimated shortages as of 2020, but the shortage of Coating, Painting, and Spraying Machine Setters, Operators, and Tenders has worsened.

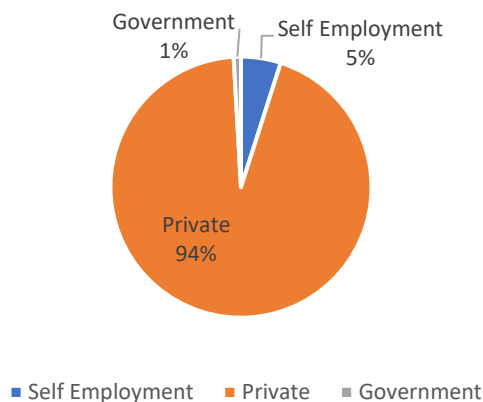
Estimated Occupation Gaps over Ten Years in Minnesota



Employment Types

About 94% of people employed in Collision Repair careers in Minnesota work for private employers, while an estimated 5% are self-employed (a slight increase from 2020). The remaining 1% work for state, federal, or local government entities.

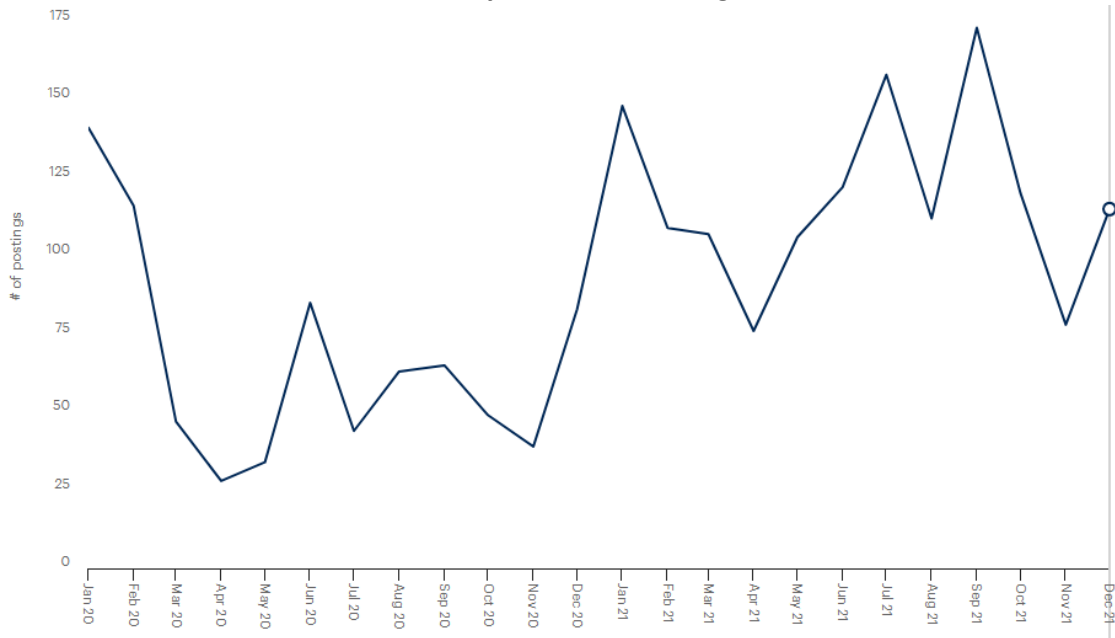
Employment Types, Minnesota 2021Q2



Job Posting Trends

Data in this section focuses on jobs newly advertised between January 1 and December 31, 2021 in Collision Repair roles across Minnesota. All data in this section comes from Gartner TalentNeuron. Overall, there were 1,424 new jobs advertised in Collision Repair during this time frame, an increase of 79% from the prior 12-month period (2020). Posts by direct employers alone were up by 94% between the two years. The share of posted positions advertised by staffing and temp agencies in the Collision Repair pathway increased in 2021 compared to 2020, implying dramatic increases in challenges finding talent in this career pathway and direct employers resorting to using new strategies to find talent.

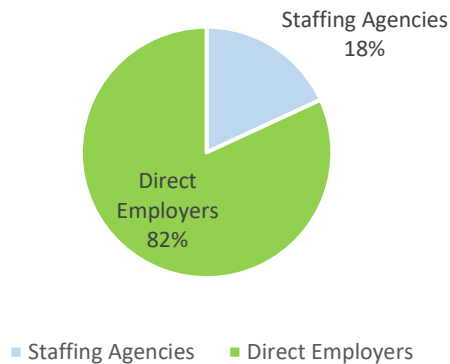
Volume of Career Pathway Online Job Postings in 2020 and 2021



Top Employers by Volume of New Job Postings in 2021, With Change from Prior Year

Employer	Percent Change between 2020 and 2021
1. Caliber Collision Centers	154%
2. Safelite Autoglass	259%
3. J.N. Phillips Glass	373%
4. Caliber Auto Glass	0%
5. People Ready	2150%
6. GPAC	0%
7. Express Employment Professionals	-3%
8. Aerotek	-30%
9. Carvana	50%
10. Walser Collision And Glass	62%

New Job Postings Advertised in Minnesota by Employer Type



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

1. Communication (-30%)
2. Glass Installation (+116%)
3. Auto Body Repair (-53%)
4. Friendliness (-55%)
5. Welding (-52%)

Top Knowledge Areas, Tools, and Tech by Volume of New Job Postings, With Change from Prior Year

1. Customer Service (+12%)
2. Personal Protective Equipment (+106%)
3. Work Orders (-27%)
4. Resource Management (+13%)
5. Fleet Vehicles (+1%)

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

1. Class D Driver's License (+160%)
2. I-CAR Certified (+620%)
3. Automotive Service Excellence (+5%)
4. OSHA (+6%)
5. HAZMAT (+77%)

Supply

This supply section is a new addition to the 2021 Demand Analysis. This data provides insight on the number of graduates Minnesota is training to fill the workforce. The data below is from the Economic Development and Employer Planning System and has been put together by the Minnesota State Transportation Center of Excellence.

Collision Repair Program Completers by Degree Level in Minnesota 2019 - 2020						
CIP Code	Program Title	Cert2	Assc	Assc+	Total	
47.0603	Autobody/Collision and Repair Technology/Technician	32	32	23	87	
		Total	32	32	23	87

Cert1 = Postsecondary award, certificate, or diploma of (less than 1 academic year)

Cert2 = Postsecondary award, certificate, or diploma of (at least 1 but less than 2 academic years)

Assc = Associate's degree

Assc+ = Postsecondary award, certificate, or diploma of (at least 2 but less than 4 academic years)

Bach = Bachelor's degree or equivalent

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 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 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 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 Director of Strategic Research Erin Olson at erin@realtimentalentmn.org or visit the RealTime Talent website at www.realtimentalent.org