

# CAR WORKSHOP SURVEY

SUSTAINABILITY IN INDEPENDENT WORKSHOPS

2022

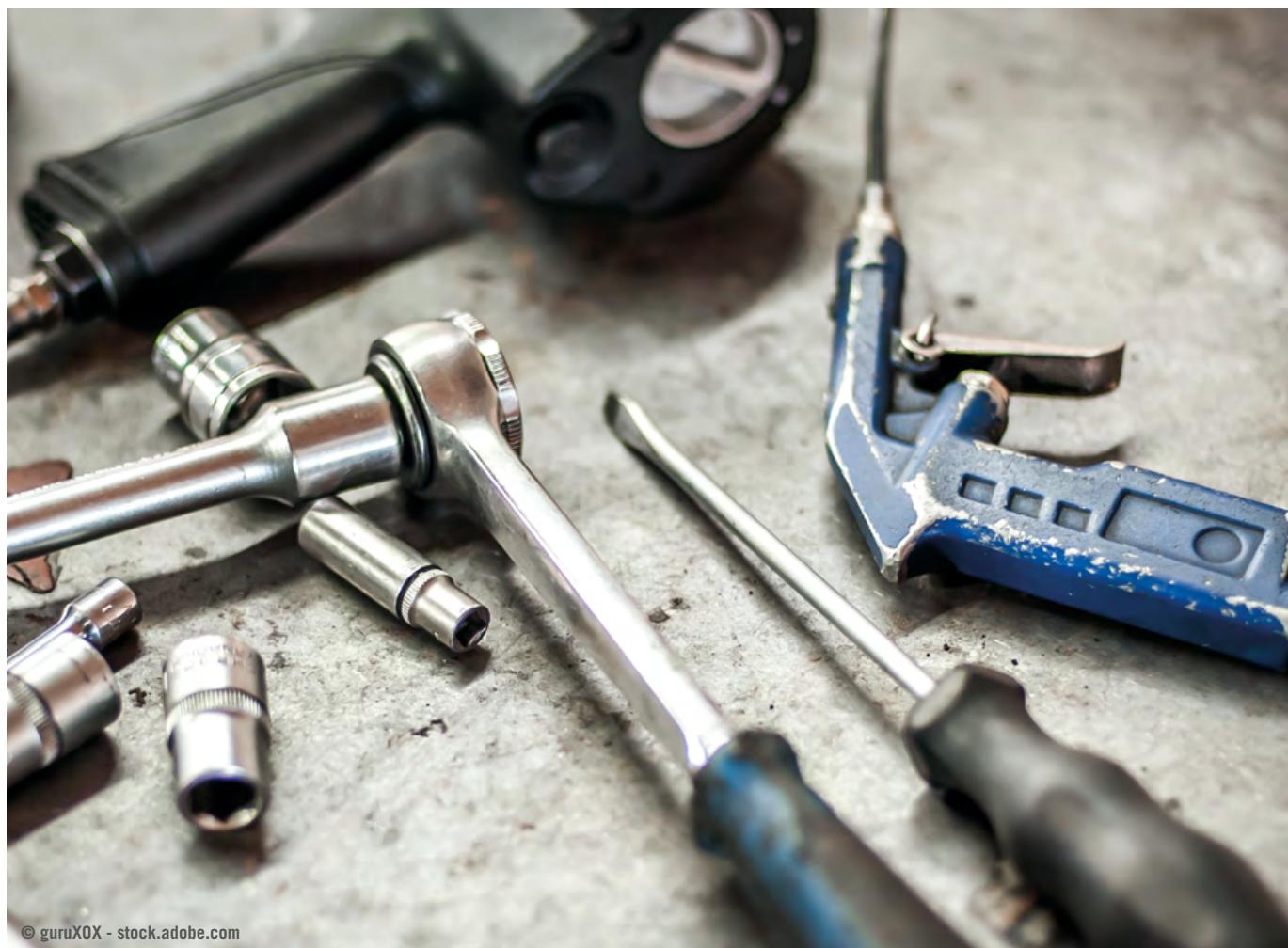


## Introduction

There's a lot of talk about sustainability at the moment. So, are there any examples of sustainability practices at independent and commercial vehicle repair shops? Do independent workshops act sustainably? Or has the free market traditionally operated more sustainably than other industries?

To find out more, the Qualität ist Mehrwert initiative launched a large-scale workshop sustainability survey from September to October 2022. A total of 824 car and commercial vehicle garages participated in the online study, shedding light and revealing which sustainable role development currently plays in independent repair shops.

**Please note:** Independent workshops, which consider product quality as a core feature of their corporate philosophy, made up the majority of survey participants. As a result, survey results are likely skewed-toward quality awareness. However, they represent valuable insights into independent workshops' sustainability issues, providing impetus across the entire industry.



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# KEY FIGURES, DATA, FACTS

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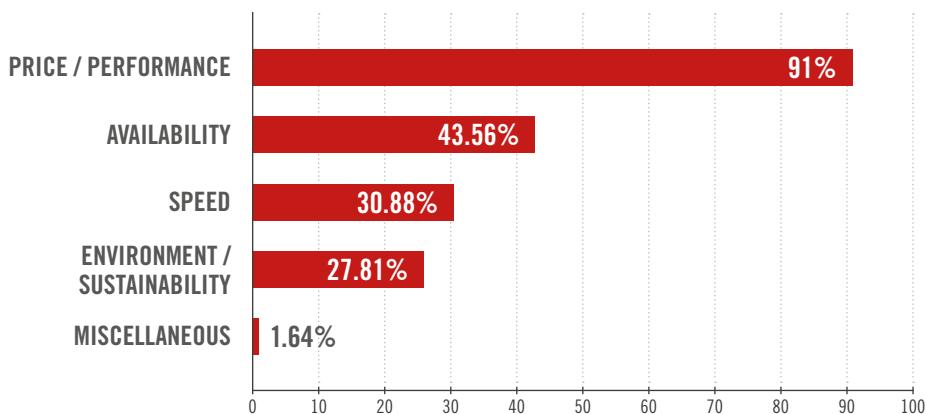
**90% OF THE AUTO REPAIR SHOPS REPORT THAT THEY HAVE DEALT WITH SUSTAINABILITY ISSUES IN THE WORKSHOP.**

**56% OF THE WORKSHOPS DECLARE HAVING ALREADY TAKEN ACTION.**

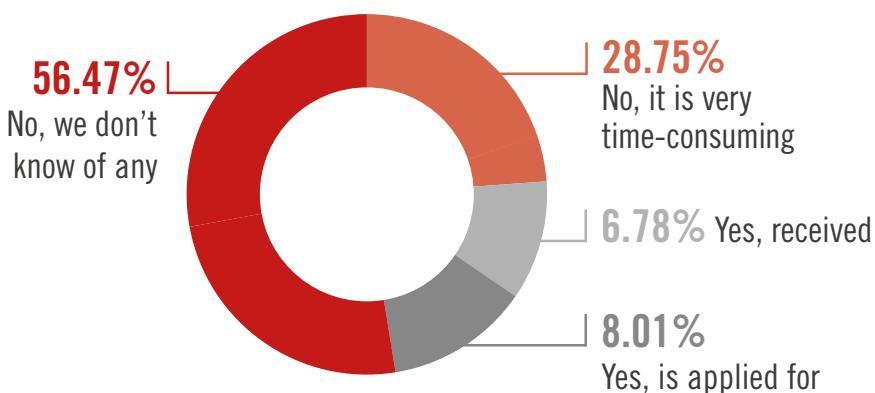
ON AVERAGE, HOW MANY PAPER PRINTOUTS DO YOU USE PER JOB?



WHICH ARGUMENTS CONVINCE CUSTOMERS TO USE REMANUFACTURED PARTS OR HAVE PARTS REPAIRED?



ARE YOU APPLYING FOR OR ALREADY RECEIVING FUNDING FOR CREATING AN ENERGY-EFFICIENT WORKSHOP?



- Sustainability practices of independent workshops:
- Renewable energy
  - Digitalization
  - Use of remanufactured parts
  - Environmentally friendly waste and toxic material disposal
  - E-mobility
  - Bee pasture/nature conservation
  - Recycling of wrapping materials/Zero waste
  - Car wash system with rainwater
  - Regional part procurement and supplier reduction
  - Paper reduction
  - Refillable detergents/bulk goods

## 10 Key Points on Sustainability in Independent Workshops

1

### Going Sustainable is on the Radar

Regarding sustainability, most survey takers consider it worthwhile to structure their workshops sustainably.

2

### The Boss Is in Charge of Sustainability

According to almost 63% of the surveyed workshops, the owner deals with sustainability.

3

### Making Sustainability a Reality

Of the workshops responding to the survey, 77% already focus on environmentally friendly waste management, closely followed by saving energy and maintenance of customer vehicles, while 59% place importance on digitizing processes, 66% on customer vehicle maintenance, with 59% using remanufactured parts.

4

### Traditional Energy Sources Remain in the Lead

By far, most of the surveyed repair shops use conventional energy sources. Roughly 61% rely on traditional energy supply, and nearly 17% of workshops have an eco-energy supply plan. In comparison, more than 28% operate a photovoltaic unit. Some 38% of the other questioned garages depend on oil, and 33% rely on gas supply.

5

### As many as 5% of the Workshops Questioned Have Already Fully Digitized the Order Process

When processing orders, 95 % of those surveyed said, they still need up to 10 printouts.

6

### Customers in Independent Workshops Have Yet to Make Sustainability a Decisive Factor

Around 52% of the shops involved in the survey say their interest in sustainability varies from case to case. In comparison, over 40% believe their customers are generally uninterested.

7

### Sustainable Actions in the Pipeline

Close to 65% of the surveyed workshops intend to implement sustainability modifications in the next five years.

8

### Increased Demand for Repairable Spare Parts

For 85% of the workshops participating in the survey, there is a strong demand to be able to repair car parts.

9

### Business Opportunities Arise From Supply Difficulties

Over 65% of participants see supply difficulties for new vehicles as a business opportunity for their company.

10

### Little Use Was Made of Subsidies

According to 56% of respondents, they are unaware of any funding opportunities for energy-efficient workshops, and almost 29% consider applying too time-consuming.

## 1. Going Sustainable is on the Radar

Environmental sustainability has reached the attention of independent workshops: Nearly 90% of the participants state that, as a repair shop, they have already considered improving sustainability in their workshops. Among them, around 56% say some initial steps are already in place, while almost 34% still need to do something specific. Furthermore, 81% see it as reasonable for their workshops to be more sustainable.

Of the workshops in the survey, 10% state that environmental sustainability is not an essential factor. While most workshops that address sustainability, for instance, opt for a primary certified waste disposal company. A noticeable finding is that this group is noticeably less likely to implement sustainability strategies and more likely to rely on conventional energy sources. In addition, this group of workshops is more cost-sensitive. 40% of the workshops that place no weight on sustainability tend to opt for the lowest-priced waste service provider.



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## 2. The Boss Is in Charge of Sustainability

The owner of 63% of the participating automotive and commercial vehicle workshops is responsible for sustainability. With 17%, this task is carried out by an employee. As few as 2% rely on an external consultant or service provider to handle sustainability issues. For 18% of the respondents, nobody is explicitly responsible for sustainability in the auto repair shop.

As a result, sustainability, along with other critical key issues like digitalization, is a top priority and, therefore, one that ends up on the desk of small and medium-sized entrepreneurs.

That explains the great need for comprehensive information among many repair shops recognizing it as a relevant issue.

Many workshops polled expressed expectations for more information on how they can set up their workshop more sustainably – especially among wholesalers (40%) and trade guilds (38%). According to the survey participants, trade media (30%), manufacturers (28%), and politicians (19%) should provide greater assistance in matters of sustainability in the workshops. In contrast, 37% of survey participants say they do not need more information on this subject.

## 3. Making Sustainability a Reality

For many garages, taking action on sustainability is well established: 77% of all those surveyed have a green approach to waste and toxic material disposal. 74% work on cutting back power consumption, and almost 67% strive to maintain their customers' vehicles at optimum levels. 59% said they use remanufactured parts and digitized processes, e.g., digital invoicing, digital scheduling, online orders, etc., to cut down on paper and printer toner. Only 5% of the garages surveyed are not currently pursuing

any sustainability goals. Most participating workshops (82%) state that they use a certified waste management company when disposing their workshop waste. Only 18% dispose of it with the lowest-cost disposal service provider.

Some independent workshops are very active at implementing traditional sustainability practices, including the following:

- Bee pasture/nature conservation
- Recycling of wrapping materials/Zero waste
- Car wash system with rainwater
- Regional parts procurement and supplier reduction
- Paper reduction
- Refillable detergents/bulk goods

## 4. Traditional Power Sources Remain in the Lead

Most of the workshops surveyed rely on traditional energy sources for their power supply: 61% use conventional electricity, almost 38% oil, and 33% gas. Eco-friendly renewable energy sources are used in roughly one-third of the surveyed repair workshops. 28.5% generate solar power using a photovoltaic unit, and 17% have an eco-energy supply plan. Some 6% of the participants count on other energy sources, including firewood, pellets, wood chips, combined heat and power (CHP), remote heating, or heat pumps.

## 5. As Many as 5% Of the Workshops Questioned Have Already Fully Digitized the Order Process

According to the information provided by the survey takers, 15% of the workshops still require up to 10 printouts per order. For 80% of the workshops questioned, up to five printouts per order are sufficient, while 5% no longer require any printouts.



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## 6. Customers in Independent Workshops Have Yet to Make Sustainability a Decisive Factor

Whether customers are interested in the sustainability aspects of workshop services varies from case to case, according to almost 52% of the surveyed workshops. Over 40% state that customers are not interested in their services being environmentally friendly, with only 8% of respondents saying otherwise. At present, it seems independent repair shop customers rarely consider sustainability aspects. Given that many measures for sustainability do exist, this has great potential: workshops can proactively promote their efforts to customers and thereby raise awareness.

## 7. Sustainable Actions in the Pipeline

Nearly 65% of the workshops surveyed plan to adopt changes related to sustainability in the next five years, while 35% percent have no plans for changes. As for planned changes, these mainly relate to the workshop area: This is where most participants (91%) intend to make changes. Many businesses also want to improve facilities (53%) and fleets (51%).

## 8. Increased Demand for Repairable Spare Parts

85% of the participating workshops would like to be able to repair more components. The survey participants state they can carry out about a third of the component repairs. The replacement of spare parts now accounts for 71%, while the proportion of component repairs is 29%. However, workshops already see a positive trend overall. Compared to 5 years ago, 27% of respondents say they are repairing more parts. (53% unchanged, 19% fewer).

Besides component repairs, the sustainability trend is also evident in the spare parts used: According to the respondents, 50% install name-brand parts, 27% OEM parts, 17% aftermarket parts, and 15% remanufactured parts. When asked, 60% of the workshops said they generally offer remanufactured parts. Currently, however, the price/performance ratio is the main factor that convinces their customers. According to 91% of respondents, this is the argument that persuades customers to buy remanufactured parts. Only 28% of the surveyed workshops have used the sustainability aspect of remanufactured car parts as a sales pitch.

## 9. Business Opportunities Arise From Supply Difficulties

Well over 65% of the participants see the supply difficulties for new vehicles as an business opportu-

nity for their company, while nearly 35% do not. On whether workshops have noticed a tendency among their customers this year to keep vehicles longer due to supply difficulties with new cars, 85.5% affirmed this, while 14.5% rejected it.

As a result, many workshops inform their customers about the possibility of preserving the value of vehicles: 85% proactively highlight inspections, maintenance, and repairs. Many participating workshops see a connection to sustainability in maintaining the value of cars. 73% rely on quality spare parts for long service life, and almost 61% advise customers in favor of more frequent repairs for sustainability reasons.

## 10. Little Use Was Made of Subsidies

Funding grants for an energy-efficient workshop are rarely used. 56% of the survey participants state that they are unaware of any funding programs, and almost 29% deem the application process too time-consuming. A mere 8% have already applied for funding grants enabling them to run an energy-efficient garage; 7% have already received funding. The survey findings reveal that workshops require more comprehensive information and guidance.



Sustainable practices are already a reality for the free market: In fact, many workshops are aware of the issue and are implementing sustainability strategies. Workshops are performing particularly effectively regarding eco-friendly waste disposal and saving energy. The free market is also committed to sustainability in its core business, vehicle repair. Most of the workshops surveyed carry out repairs on parts when possible and wish they could repair more components in the future. Furthermore, according to the participants, the proportion of remanufactured parts used is already around 15%. This has one drawback: From the perspective of the workshops, sustainability at the workshop is currently not a significant issue for customers. Consequently, the sales pitch for remanufactured parts is price/performance rather than sustainability.

Moreover, customers are rarely interested in the environmental aspects of the repair process. The situation will, can, and must change: The open market has a unique position and offers customers sustainable mobility solutions to a notable degree. The industry is responsible for conveying this service to the customers' perception.

There is room for expansion in the share of renewable energies. Funding opportunities for small and medium-sized businesses are, however, scarcely utilized. Only 7% of those surveyed have received subsidies (i.e., for wall boxes). Of those surveyed, 29% reject funding programs because they are too complicated; 56% are unaware of any relevant funding programs. Regardless, most auto repair shops plan to modify their workshop towards increased sustainability using their resources within the next five years.

Many workshops use the supply bottlenecks for new cars to draw customers' attention to maintaining the value of vehicles and see a correlation to sustainability in this context. As far as workshops are concerned, this area has further potential by raising their customers' awareness of the long-term advantages of maintenance and quality spare parts.

The industry needs to support independent workshops actively. They need more information on sustainability, repairable components, and remanufactured parts. Independent workshops also require better information on funding programs to improve energy efficiency to take advantage of government incentives.

## About the Initiative **Qualität ist Mehrwert**

Qualität ist Mehrwert is an initiative of renowned automotive parts manufacturers in the automotive aftermarket. The initiative aims to highlight the benefits of quality components to the car and commercial vehicle workshops, the aftermarket, and drivers - through informative literature, at events, and on the website. The objective is to increase awareness of the quality aspects of vehicle repairs significantly.

**All partners, upcoming events, and additional information are available on the Internet at:  
[qualitaet-ist-mehrwert.de](http://qualitaet-ist-mehrwert.de)**

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