Founded in 1947… Safelite Group is the largest vehicle glass and claims management specialists in the United States.

In 2007… Safelite was acquired by Belron. As the world’s largest company dedicated to vehicle glass, global best practices are shared worldwide.

Largest vehicle glass repair and replacement company in the U.S.

Claims management for fleet and P&C Insurance industries.
Our Impact

- 11M customers served companywide
- 7M customers served through Safelite AutoGlass
- 6,900 technicians
- 16,000 associates
- 91 warehouses and 2 distribution centers
- Coverage for 100% of U.S. drivers in all 50 states
- 87% NPS
Advanced Safety Systems
Today’s vehicles are rolling computers

Avg. vehicle has 80 ECUs* and 60-100 sensors enabling features like:

• Seat occupancy (airbag deployment)
• Drowsiness monitoring
• Automatic/Emergency Braking
• Augmented reality navigation
• Forward Collision Warning
• Adaptive cruise
• Lane Keeping

When a sensor enabling ADAS is moved intentionally, such as a front facing camera with a windshield replacement, recalibration is required

*Think of them as minicomputers
What is Recalibration and why is it required?

- When the windshield is replaced, the camera sensor attached to the glass is moved.
- Camera does not know its position in space – its ability to recognize objects and distance is impacted.
- Recalibration enables the vehicle’s systems to again determine the orientation angles of the camera.
What is Recalibration and why is it required?

- Static
- Dynamic
- Dual

- Unique to each VM
- $300-$400 per
- Frequency/Severity issues
Growth in Front Camera Penetration Rate will continue from non-existent to +/- 25% of carpark in a few short years. Model year 2021 vehicles approaching 80% penetration rate.

Front Camera Penetration Rate by Model Year

Carpark Front Camera Penetration Rate

- 2018: 8%
- 2019: 14%
- 2020: 19%
- 2021: 25%

All Segments
ADAS Umbrella

- R2R
  - Withholding data
  - Use parts and procedures
  - OEM Mandates

- OEM Mandates

- Diagnostics

- Safety
  - Transparency
  - Services not performed

- Fraud

- Customer Satisfaction
  - 1 hr to 3 hrs
  - Limited mobile
  - Dealer/VM curse

- Limited mobile

- Dealer/VM curse
ADAS Policy Issues

- Access to data portals
- Avoid mandates
- Consumer transparency
- Unfair claims/trade provisions
- VM double dipping fees
- Anit-steering/consumer preference
Thank You

QUESTIONS?

CAN YOU REPEAT THE PART OF THE STUFF WHERE YOU SAID ALL ABOUT THE THINGS?