



Preparing for the future:

Understanding the skills & training needs
of the automotive retail sector

Summary Report: Main Findings and Recommendations

imi

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MOTOR INDUSTRY

Institute change.



Employer Investment Fund (EIF)

In 2011 the IMI secured investment from the UK Commission for Employment and Skills (UKCES) to part fund the largest ever research study it had conducted, to establish the skills and training needs of the retail automotive sector over the next two years, with particular focus on micro and small businesses. The investment, which forms part the Government's Employer Investment Fund (EIF), helps deliver projects to boost enterprise, jobs and growth. The outcomes of the research established the needs for every key job role across all 12 sub-sectors of the automotive retail sector and is freely available to view and download from the IMI website theimi.org.uk/research

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Executive Summary

The automotive retail sector is a substantial generator of wealth for the UK. In 2008, the sector generated £146 billion or 4.7% of all UK turnover and contributed £25 billion or 2.8% of gross value added (GVA).

The sales of motor vehicles generated the majority of turnover (70%) and contributed the most in value added terms (47%). The sector is vital to the smooth running of the economy as it keeps the 35.3 million vehicles registered in the UK on the roads.

To ensure that the automotive retail sector continues to play a significant role in the UK economy, it is essential that it maintains a workforce which is competent and with up-to-date skills. Skills gaps and shortages have a negative impact on the economic growth of sectors and ultimately limit the UK's ability to compete in a global market.

To fully understand the skills landscape across the entire automotive retail sector, the IMI embarked on a programme of extensive granular research which spanned four months, engaging with over 1,600 employers through a variety of mediums. BMG Research carried out interviews on behalf of the IMI and reported the outcomes through a series of reports. The research ascertains the skills and training needs across each sub-sector within the IMI's Sector Skills Council (SSC) footprint.

This research focused on the independent micro- and SME-businesses that make up 85% and 14% respectively of all businesses operating in the sector. Predominantly our respondents were from the independent sector as opposed to the franchised dealer networks who work more directly with manufacturers. We focused on these businesses as the skills needs in this area are often overlooked and not addressed by the solutions provided. Identifying their skills and training needs will make it possible to add yet another range of solutions to the already extensive offer in place.

The research took the form of three distinct phases utilising a range of research instruments. The initial phase was a qualitative telephone survey involving 179 in-depth interviews with employers from across the whole sector. These interviews focussed on the skills and training needs of businesses over the next 18 months to two years. This phase defined the broad skills needs of the sub-sectors.

The second, quantitative phase of research was designed to validate and expand on the issues raised in the initial phase. A telephone survey was used to confirm the skills identified in phase 1 and to prioritise those skills and training needs. The robustness of this phase was further enhanced by a web survey, which furnished additional data on priority skills needs.

The third and final phase was a series of focus groups with employers from each of the 12 sub-sectors. These focus groups validated the skills and training needs identified through each of the preceding phases of research and enabled us to arrive at a core set of skills needs covering technical, management and customer service job roles.

The result of this research identifies the skills needs within each job role within each sub-sector. Within this report we have identified the top five skills needs identified by employers as 'critical' within each job role within each sub-sector.

Besides the identification of technical skills needs within each sub-sector, there is clear need for solutions in management and customer service job roles across the entire automotive sector. The research has been able to identify, within individual sub-sectors, what these management and customer service skills needs are.

The research also identifies those sub-sectors in most need of skills needs solutions and those that plan to reduce training over the next two years.

The IMI will use the findings from this research to inform the development of good quality, cost effective, accessible skills and training solutions to address those skills needs which have been identified as 'critical' by employers. The focus on the independent micro- and SME-business sector will make tailored skills development solutions accessible to this business sector.

Providing skills and training solutions specifically to meet the needs of employers will help the sector meet the current and future challenges of technological advances, increased competition and rising consumer expectations.

The IMI believes that stimulating economic growth and achieving a highly skilled workforce must be embarked upon using an equal and co-ordinated approach engaging both employers and employees, to create both greater aspiration in individuals and galvanise employer investment in skills.

The IMI has determined, from previous return on investment studies that up skilling in the automotive retail sector delivers a conservative Gross Value Added (GVA) of £4,000 per person, per annum.

The need for workforce development is unequivocal.

Introduction

Background to the sector

In 2008 the automotive retail sector generated £146 billion or 4.7% of all UK turnover and contributed £25 billion or 2.8% of gross value added. The sales of motor vehicles generated the majority of turnover (70%) and contributed the most in value added terms (47%). Geographically England, as would be expected, generated the majority share in terms of both turnover and value added at 88%.

Across all sub-sectors, 85% of businesses are micro businesses, employing less than 10 people. However, they employ only 38% of the total sector workforce. While 57% of all employment is concentrated into those companies that employ over 11 (this accounts for only 14% of all companies), with the remaining 5% of the workforce working for large employers, who account for less than 1% of all businesses.¹

In summary, there are 81,265 businesses employing 509,148 employees engaged in activities that fall within the IMI footprint. These statistics are taken from the Inter Departmental Business Register (IDBR) 2010, for the number of businesses and the Labour Force Survey (LFS) 2010, for the number of employees, and are produced by the Office of National Statistics (ONS). Both sets of data are official Office on National Statistics datasets and the most reliable and valid source available. These statistics are based on the number of VAT registered and/or PAYE businesses and are based on the Standard Industry Classifications (SIC) Codes, 2007 for the automotive retail sector. Unfortunately, these classifications do not identify automotive retail sub-sectors in the same way as the sector does. The table below outlines the ONS sub-sector statistics.

	Businesses	Employment
Vehicle maintenance and repair	38,895	285,059
Sales	23,520	111,473
Rental and leasing	5,050	29,985
Motorcycle repair and sales	2,300	11,535
Parts distribution and supply	11,500	71,096
UK	81,265	509,148

Table 1. Number of businesses and workforce by sub-sector.
Source: ONS LFS and IDBR 2010

¹ Annual Business Inquiry, 2008

Vehicle maintenance and repair and vehicle sales are the largest sub-sectors, with approximately 38,895 and 23,520 businesses employing 285,059 and 111,473 people respectively. Within vehicle maintenance and repair, however, there are a number of sub-sectors not identified in the ONS statistics, including autoglazing, fast fit, vehicle inspection, roadside assistance and recovery, accident repair, heavy and light vehicle.

The automotive retail sector as a whole has a relatively low number of staff qualified at a high level. In 2009 just 9% of the automotive retail workforce were qualified to S/NVQ level 4 and above compared with 35% of the whole UK population.²

Managers and senior staff account for 19% of the automotive retail workforce, slightly higher than the average for the UK of 16%. Of automotive retail sector managers and senior staff, just 15% hold S/NVQ level 4 and above qualifications, compared

with 46% of all managers in the UK working population. 9% of all managers in the sector have no formal qualifications compared with 4% of all UK managers.³

Unemployment in the automotive retail sector stands at 14,660 in August 2011; this is 340 higher than a year ago. The number of vacancies stands at 3,194 in August 2011, a fall of only 70 from August 2010.⁴

Trading conditions in the automotive retail sector are difficult and are forecast to remain so for the rest of this year at least, impacting on all sub-sectors, especially the vehicle sales sub-sector. The Auto Retail Network newsletter, of 10 October 2011, reported that the average UK franchised automotive retailer made a trading loss of £15,000 in August. Data collected by the IMI in July 2011 from large dealerships across the country reflect these findings, see Table 2 below.

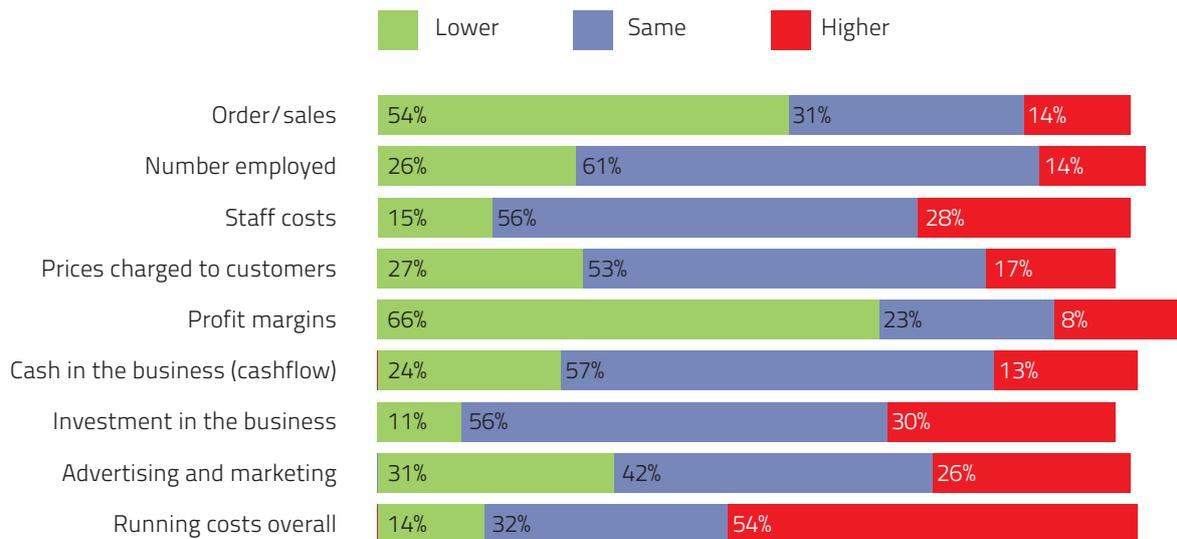


Table 2: Business performance in last 6 months, compared with previous 6 months. Source: IMI State of the Sector (July 2011)

² Sector Skills Assessment for the Automotive Retail Sector, UK, 2010

³ Labour Force Survey, 2009

⁴ Labour Force Survey, August 2011 (in-year figures).

Purpose of the research

Each year the IMI, as the SSC for the automotive retail sector, carries out a Sector Skills Assessment (SSA). This research, commissioned and funded by the UK Commission for Employment and Skills (UKCES), assesses the skills needs of the sector. However, this research has only ever given us a high level of detail and has lacked the detail and granularity needed to develop solutions that meet the needs of employers in the sector.

With this in mind, and in order to enable employers to prepare for the future, the IMI initiated and conducted an extensive programme of in-depth granular research to fully understand the extent of the skills and training needs across each of the 12 sub-sectors within its footprint. The focus of the research would be predominantly on the independent micro- and SME-business sector. The purpose of this research is to recognise, at job role level, within each distinct sub-sector, precise skills needs within the existing workforce.

It is vital that the IMI, as the SSC and the professional association for the automotive retail sector, understand employers' immediate and critical skills needs in order to identify and/or formulate effective solutions to address these skills needs, if we are to ensure that the automotive retail sector begins to improve its overall productivity and profitability. This will ultimately help businesses position themselves for economic recovery, when it comes, allowing them to compete in a globally competitive market.

Methodology

To achieve our stated purpose the IMI had to engage with employers, stakeholders, training providers and trade associations to ensure the research findings were accurate, validated at each phase, robust and fit for purpose.

To accomplish this, a qualitative phase of research was carried out. This involved 179 in-depth telephone interviews, each lasting one and a half hours, with employers across each of the sub-sectors. The focus of these interviews was on skills

and training needs within the business, the issues facing the employer and the future challenges they envisaged over the next 18 months to two years. This first qualitative element (i.e. the use of open questions to gain responses) successfully defined the broad skills needs of the sub-sector.

The second phase of the research, the quantitative phase, was designed to validate and expand on the issues raised in the first phase, by the use of a telephone survey which contained the summary findings and analysis from the first phase. The telephone interview asked respondents to confirm that the skills needs identified from the in-depth interviews were accurate, they were then asked to prioritise each of the skills and training needs identified. Approximately 900 employers took part in the telephone interviews, with a representative sample from each sub-sector, to enable accurate data to be collected and robust conclusions to be drawn. This stage also complimented by a web survey, which furnished 630 additional responses, to ensure that as many employers as possible had the opportunity to respond to the questionnaires in as many different ways as possible.⁵

The final main phase of the research involved 12 focus groups with employers to benchmark their views on skills needs against the findings from the first and second phases of the research. This enabled us to arrive at a final set of core skills needs, covering technical, management and customer service job roles.

Once all the data had been collected it was analysed by channelling the responses from the initial in-depth interviews in to a much more concise number of core skills needs, using the findings from each consecutive phase of the research as the starting point for the next. By doing this, we have achieved a high level of confidence in the conclusions we have arrived at.

A final set of 12 sub-sector reports are available which present a more detailed picture of the skills needs across all sub-sectors. This summary report identifies the key findings for all sub-sectors.⁶

⁵For the telephone survey data, at a 95% level of confidence (i.e. 95% confident that the results didn't happen simply by chance) the sub-sector reports are accurate to within $\pm 3\%$. As we are cross referencing the data with the focus group and web survey data, our confidence level is higher. This was originally reported as $\pm 6\%$, but further analysis was undertaken which has reduced this to $\pm 3\%$.

⁶The report covers all 12 sub-sectors; however, for the accident repair sub-sector a different methodology was followed. This is expanded in the accident repair section of this report.

Research findings

Respondents across the research instruments were asked to rate skills needs as 'critical,' 'some skills and training needs' and 'no skills or training needs'. This consolidated report focuses on the critical skills needs as highlighted across the telephone, web surveys and the focus groups.

Respondents across the research instruments were asked to rate skills needs as 'critical,' 'some skills and training needs' and 'no skills or training needs'. This consolidated report focuses on the critical skills needs as highlighted across the telephone, web surveys and the focus groups.

Respondents to the telephone survey were also asked what the main issues were affecting their overall business, and it was clear that three issues were critically important:

- Impact of changes in legislation, and changes in legislation forecast over the next 18 months
- Trading conditions – the fall in vehicle sales in particular over the last two years and the sluggish revival (particularly important to the sales sub-sector)
- The relentless drive in technology development across all vehicle types.

The web survey had 630 respondents. The findings from the web survey did validate those from the telephone survey and focus groups, but due to respondents being self-selecting⁷ and the non-representative numbers responding from any one sub-sector, priority has been given to the responses from the telephone and focus group data.

Who is training

Three-quarters of all businesses have provided training in the last two years. The highest incidence of training is to be found in autoglazing and vehicle inspection where 92% and 86% of businesses have provided formal training in the last two years and 64% and 60% respectively plan

to provide more in the next two years.

A structured training strategy is more prevalent in small to large business (11+ staff) where 55% of businesses have a strategy. Among micro businesses (1-10 staff) formal training is most likely to occur whenever there is a defined need (49%).

Reasons for not training

The main reasons cited for not training is that the business is small and all staff and managers are fully skilled for their role (88% of those surveyed). 61% of businesses only recruit fully skilled staff. Interestingly, 49% of businesses feel that training is too expensive.

Who is providing training

In small to large businesses, motor manufacturers and private training providers are more likely to be used to deliver training with 65% accessing manufacturer training and 51% private training suppliers. As much as 50% of micro businesses also access manufacturer training. However, specialist internal staff training is also used by 52% of small to large businesses and 36% of micro business types.

Delivery of training by an experienced trainer, particularly on site, is preferred by all types of businesses. Online learning is used by 31% of small to large businesses and 22% of micro business. Only 50% of all businesses surveyed preferred courses leading to a nationally accredited qualification. The majority, 78%, across all business types preferred short courses or training that lasted from a few hours to a few days.

⁷The web survey allowed respondents to identify which sector(s) they operated in and allowed them to choose the job profiles they wished to comment on. Whereas the telephone interviews qualified respondents first.

Sub-sector findings by job role

Each sub-sector report contains more granular detail on the skills and training needs for each job role. This summary report focuses on the top five skills needs and on commonalities across the sub-sectors.

Autoglazing

The autoglazing sub-sector is characterised by a mobile workforce working away from their base, the sub-sector is highly competitive and quick to react to demand, resulting in an emphasis on maximising returns on investment in training and development. Dominated by a small number of large employers, there are also a significant number of independent employers who are keen to see a consistently high quality offer being made to all customers.

Job roles

The key job roles researched in the autoglazing sector are: Glazing Assistants; Glass Repairers; Management staff; Customer Service staff.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Glazing Assistants

- Keeping up to date with vehicle systems associated with glass repair.
- Procedures that affect a quality repair – e.g. cleaning glass and body work before applying adhesives.
- Assessing the work environment for safety and applying personal safety procedures.
- Procedures for pre-repair system operation and checking post-repair.
- Knowledge of the procedures for the disposal of waste products.

Glass Repairers

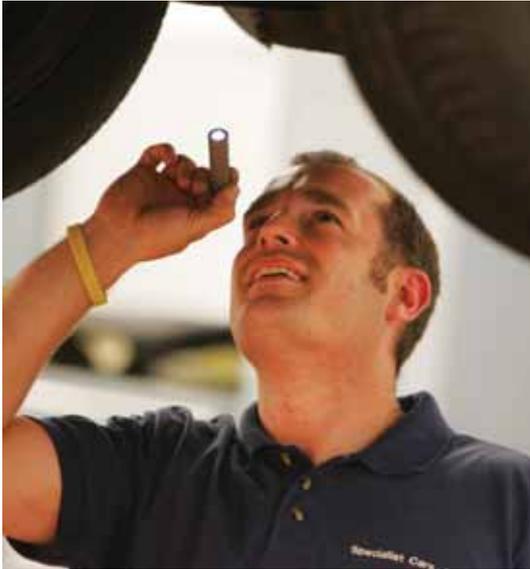
- Procedures that affect a quality repair – e.g. cleaning glass and body work before applying adhesives.
- Assessing the work environment for safety and applying personal safety procedures.
- Keeping up to date with vehicle systems associated with glass repair.
- Understand the correct repair procedure with regard to PPF and vehicle protection.
- Understanding the implications of leaving broken glass in the vehicle, doors, heater vents etc.

Management staff

- Maintaining positive customer relations and dealing with complaints.
- How to make a profit running an efficient department.
- Understanding health and safety legislation and applying it.
- Effective management level decision making.
- Having good product knowledge and awareness – new car and technology.

Customer Service staff

- Understand the importance of friendly and polite conversation, putting the customer at ease and communicating any delays.



- Provide information in a friendly and professional way, and with confidence.
- Understand the procedure for post repair customer satisfaction checks on the vehicle.
- Understand how to meet customer needs, the right body language, non-verbal and verbal communication that provides a good customer experience.
- Communicate with customers to identify vehicle details accurately. Describe what work needs to be done and give a price for the repair.

Fast Fit

The fast fit sub-sector offers services including tyre replacement and repair, exhausts, batteries, brake repair and replacement, vehicle servicing and MOTs.

General servicing is a growth area for the sub-sector, with many companies expanding their offering to fleet managers.

Job roles

The key job roles researched in the fast fit sub-sector are: Technician; Management staff and Customer Service Advisors.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Technician

- Understanding new technologies for braking systems – electronic handbrake.
- Using diagnostic fault code readers –

understanding fault codes associated with ABS and/or active suspension.

- Suspension and wheel alignment: How to identify worn or unserviceable components across a range of different system types.
- Oil changes: health and safety methods/procedures when working with oils – environmental considerations.
- Oil changes: identifying different grades of oil – selecting the right oil (applying technical data for specific vehicles).

Management staff

- Having good product knowledge and awareness – new car and technology within the sector.
- People management – team working, motivation, recruitment, appraisals, delegation, discipline, managing targets.
- Effective ways to gain repeat business – driving a customer care culture in the business.
- Understanding health and safety legislation and applying it.
- Developing awareness and understanding of company law, laws that affect the business.

Customer Service Advisors

- Effective telephone skills.
- Effective communication skills.
- Effective sales skills.
- Effective counter skills.
- Effective problem solving – dealing with customers to ensure their needs are met.



Heavy Vehicle Maintenance and Repair

The heavy vehicle maintenance and repair sub-sector has performed positively with regard to sales, with van and truck registrations up 8.8% to 43,442 units in September, rolling year up 20.9% to 293,703.⁹

The demands of commercial vehicle customers differ somewhat from those of passenger car keepers. For commercial vehicle operators, downtime is lost income, which may have a significant impact on business success. So, for example, all-hours maintenance and repair services are commonly offered combined with a 'can-do' engineering-focused, problem-solving ethos in support of customer needs. Overall the dynamics of sales, maintenance and repair activities are rather different from that found in the car market.

Job roles

The key job roles researched in the heavy vehicle maintenance and repair sub-sector are: Heavy Vehicle Technician, Master Technician; Management staff and Customer Service staff.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Heavy Vehicle Technician and Master Technician

- Effective knowledge and understanding of the braking systems, changing disks, re-aligning, testing, maintenance and diagnosis.
- Ability to strip down and rebuild the braking system.

- Health and safety training, how to work safely in the workplace.
- Understanding modern electronics in trucks, e.g. control units, ABS, EBS.
- Understanding and awareness of suspension, e.g. steel suspension identifying and replacing broken springs, diagnosis and fix, identify future problems, recalibrate, wheel alignment settings, electronic air suspension diagnosis and repair.

Management staff

- Effectively managing the flow of work through the workshop.
- Effective customer liaison.
- Understanding and awareness of health and safety.
- How to keep staff effective.
- Understanding the customer viewpoint and defining their needs and meeting them.

Customer Service staff

- Effective problem solving - dealing with customers to ensure their needs are addressed.
- How to deal effectively with complaints.
- Effective telephone skills.
- Awareness and understanding of IT in the workplace, invoicing, accounts, booking.
- Effective communication skills.

⁹SMMT, October 2011



Light Vehicle Maintenance and Repair

While reliable and valid data for this sub-sector is hard to obtain, we know from other IMI research⁹ that the light vehicle maintenance and repair sub-sector is the largest within the automotive retail sector.

The build quality of cars has significantly improved over the years and this has had a major effect on the frequency of servicing. It has also increased the need for less complex services. It is likely that only the increasing size of the vehicle parc has saved this sub-sector from a more pronounced decline than already experienced. The annual number of services and mechanical repairs carried out has declined by 19% from 57.9 million in 1998 to an estimated 46.7 million in 2008. This reduction has contributed to the number of service and repair workshops going down by an estimated 30% between 1998 and 2008.¹⁰

Job roles

The key job roles researched in the light vehicle maintenance and repair sub-sector are: Technicians; Management staff and Customer Service staff.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Technicians¹¹

- Understand how to source and analyse relevant data to inform inspection, accurate diagnostics, maintenance and repair procedures.

- Understand how complex interrelated systems operate.
- Understand the impact, including safety, of not diagnosing and repairing systems correctly.
- Be able to correctly carry out accurate, diagnostics, maintenance and repair on braking, steering and suspension systems.
- Be able to replace braking system components, including the manufacture of brake pipes, system adjustment and bleeding.
- Be able to follow the correct procedure to check and rectify wheel alignment using wheel alignment equipment including laser type.
- Be able to safely check, disarm and arm SRS systems were repair process requires this operation.

Management staff

- Understanding and awareness of health and safety.
- Effective customer liaison.
- Understanding the customer viewpoint.
- Effective delegation for managers.
- How to keep staff effective.

Customer Service staff

- How to deal effectively with complaints.
- Effective problem solving - dealing with

⁹ The Institute of the Motor Industry: Footprint Mapping 2010.

¹⁰ Sector Skills Assessment 2010.

¹¹ Due to the complexity of this sub-sector, seven top skill needs are highlighted in this report.



customers to ensure their needs are addressed.

- Effective telephone skills.
- Effective communication for customer service advisors.
- Effective counter service skills for customer advisors.

Motorcycle Maintenance and Repair

The motorcycle maintenance and repair sub-sector employs approximately 11,535 people across 2,300 businesses. There are approximately 1,300,000 million licensed motorcycles in the UK.

The motorcycle industry experienced a tough year in 2009 with registrations of motorcycles and mopeds down 20.2% at the end of 2009 compared with 2008. This followed a smaller decline of 3.4% in 2008. As of September 2010 there had not been much turnaround for the sub-sector; The Motor Cycle Industry Association (MCIA) reports that registrations of motorcycles and mopeds declined 14.4% compared to the same period the previous year.

Job roles

The key job roles researched in the motorcycle maintenance and repair sub-sector are: Technician; Diagnostic Technician, Master Technician, Management staff and Customer Service Advisors.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role in the motorcycle sub-sector are highlighted below.

Technician, including Diagnostic, and Master Technician

- Awareness and understanding of making the bike safe.
- Awareness of how the gearbox and engine operate, how to dismantle them and rebuild effectively.
- Developing effective awareness and understanding of braking components and their operation, inclusive of disc wear and tear, alignment and leaks.
- Awareness and understanding of drive transmission, chain/belt/automatic semi-drive systems, service intervals, lubrication products and processes, safety implications.
- Developing an effective awareness and understanding of electrical systems, following wiring diagrams, use of diagnostic machines, relays, coupling and theories of resistance (e.g. Ohms law).

Management staff

- Maintaining positive customer relations and dealing with complaints.
- Understanding health and safety legislation and applying it.



- Having good product knowledge and awareness – new bikes and technology within the sector.
- How to make a profit running an efficient department – reviewing the market.
- Effective ways to gain repeat business – driving a customer care culture in the motorcycle business.

Customer Service Advisors

- How to deal effectively with complaints.
- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective communication for customer service advisors.
- How to effectively undertake follow up calls following servicing and or sales to gain repeat business.
- Effective counter service skills for customer advisors.

Parts Distribution and Supply

The parts distribution and supply sub-sector employs 71,096 people across 11,500 businesses. Data from previous research reports conducted by the IMI (Employer Survey 2009 and 2010) has shown this sub-sector to have a significant percentage of employers dissatisfied with the present skills levels, and with a high level of hard-to-fill vacancies.

Job roles

The key job roles researched in the parts distribution and supply sub-sector are: Parts Advisor; Drivers; Warehouse staff; Management staff and Customer Service Advisors.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Parts Advisor

- The importance of customer service and how to provide it in a quality way – good people skills.
- Interpreting customer information accurately – producing the right parts first time.
- Procedures to handle enquiries and to ask the right questions to get accurate vehicle and part information.
- Telephone skills to provide/ensure good customer service.
- A good understanding of vehicle systems, the parts associated with vehicle systems.

Drivers¹²

- Effective health and safety for drivers.
- How to deal effectively with customers.
- How to effectively check orders for accuracy.

¹² Only three skills needs are listed for Drivers.



Warehouse staff

- An understanding of alpha numerical sequencing – putting parts in the right place on the shelf.
- Understanding health and safety legislation.
- Logistical skills re: parts bin locations, delivery locations, stock monitoring, handling stock, reading parts orders correctly, organising parts at front of house for customer collection.
- Specific product knowledge.
- Stock taking, ordering, checking, controlling/monitoring – using bar code systems; being able to realise the minimum and maximum stock levels and associated cost; speculative ordering.

Management staff

- Maintaining positive customer relations/dealing with complaints.
- Effective ways to gain repeat business – driving a 'customer care' culture in the business.
- How to make a profit running an efficient department.
- People management – team working, motivation, recruitment, appraisals, delegation, discipline, prioritising, managing targets.
- Understanding health and safety legislation and applying it.

Customer Service Advisors

- Effective telephone skills.
- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective communication for customer service advisors.
- How to deal effectively with complaints.
- Effective sales skills for customer advisors.

Roadside Assistance and Roadside Recovery

For the purposes of this summary report, the roadside assistance and roadside recovery sub-sectors have been amalgamated as they are closely aligned. Combined, this sub-sector is dominated by a small number of large companies, it is heavily regulated and has a focus on health and safety training to ensure it is compliant with current legislation at all times. Previous research (IMI Employer Survey 2009, 2010) has shown skills gaps within management and customer service roles, but the majority of businesses felt that skills gaps will remain the same over the next 2–3 years.

Roadside Assistance

Job roles

The key job roles researched in the roadside assistance sector are: Assistance: Technicians and



Recovery Drivers; Management staff; Customer Service Advisor/Control Centre staff.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Assistance: Technicians and Recovery Drivers

- Effectively appraising the area and identifying hazards in the recovery area.
- Awareness and understanding of health and safety legislation.
- Effectively understanding and using risk assessments in the breakdown environment.
- Awareness and understanding of electronics in the modern vehicle.
- How to effectively gather information from customers.

Management staff

- Understanding health and safety legislation and applying it within the roadside assistance sector.
- Developing awareness and understanding of company laws, laws that affect the business.
- Maintaining positive customer relations/dealing with complaints.
- People management – team working,

motivation, recruitment, appraisals, delegation, discipline, prioritising, managing targets.

- Effective ways to gain repeat business – driving a customer care culture in the business.

Customer Service Advisor/Control Centre staff

- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective telephone skills.
- Effective communication for customer service advisors.
- How to deal effectively with complaints.
- Effective counter service skills for customer advisors in the roadside assistance sector.

Roadside Recovery

Job roles

The key job roles researched in the roadside recovery sector are: Recovery Drivers and Technicians; Management staff; Customer Service Advisor/Control Centre staff.

Top five skills needs

The top five skill needs (when analysing data from across all research instruments) by key job role are highlighted below.

Recovery Drivers and Technicians

- Health and safety training for vehicle recovery technicians.



- Effectively securing vehicles for transport.
- Awareness and understanding of health and safety.
- Effectively following PAS43.
- Knowledge of current legislation.

Management staff

- Understanding health and safety legislation and applying it within the roadside recovery sector.
- Developing awareness and understanding of company laws, laws that affect the business.
- Maintaining positive customer relations/dealing with complaints.
- How to make a profit running an efficient department.
- Effective ways to gain repeat business – driving a 'customer care' culture in the business.

Customer Service Advisor/Control Centre staff

- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective telephone skills.
- Effective communication for customer service advisors.
- How to deal effectively with complaints.
- Awareness and understanding of IT in the workplace, invoicing, accounts and booking.

Vehicle Inspection

Sections 45 to 48 of the Road Traffic Act 1988 provide the legislative basis for MOT testing. The purpose of the MOT test is to ensure that light vehicles over three years-old are inspected at least once a year to see that they comply with key roadworthiness and environmental requirements.

The requirement for annual testing has provided the service, maintenance and repair sub-sector with an enormous workload with regard to the physical test itself and associated repairs highlighted by test failures. Changes around the MOT criteria and requirements also have a large impact on these businesses. Over 19,000 garages and workshops are authorised to perform testing and issue certificates (in Northern Ireland tests are performed exclusively at the DVA's own test centres). These businesses must keep their workforce up to date with the current regulations. In fact, in a recent employers survey conducted for IMI, 63% of those questioned stated that 'keeping up with legislative and regulatory requirements' is one of the key challenges for their business.¹³

Job roles

The key job roles researched in the vehicle inspection sector are: Technicians and MOT Testers; Management staff and Customer Service staff.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

¹³ Employer Skills Survey, 2010



Technicians and MOT Testers

- Understanding how to advise customers when a component is within or outside tolerance.
- Effectively identifying faults on a vehicle whilst carrying out a vehicle inspection.
- How to ensure a vehicle is safe and roadworthy, identifying worn parts which do not fail but need highlighting to the customer.
- Ability to understand when a component is new, wearing or worn out.
- Effective understanding of tolerances and how they impact on the test.

Management staff

- Understanding and awareness of health and safety.
- How to deal effectively with complaints.
- Effective customer liaison.
- How to keep staff effective.
- Understanding and awareness of changes in legislation.

Customer Service staff

- How to deal effectively with complaints.
- Effective telephone skills.
- Understanding and awareness of costing principles for repair.
- Effective communication for customer service advisors.
- Effective problem solving – dealing with customers to ensure their needs are addressed.

Vehicle Rental and Leasing

The rental and leasing sub-sector employs 29,985 people across 5,050 businesses. Previous research undertaken by the IMI (2009 Employer Survey) has shown a high percentage of hard-to-fill vacancies within this sub-sector, with the main reason for recruitment difficulties being the lack of people with the right skills. Rental services are seen as different from leasing (mainly based on the length of the rental period) with a different skill-set required to accommodate more interaction with the customer.

Job roles

The key job roles researched in the rental and leasing sector are: Vehicle Assessor; Vehicle Rental Service Technician; Rental Operators/ Receptionist/Reservation Agent; Management staff; Customer Service Advisors.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Vehicle Assessor

- Damage control – understanding the role of the Vehicle Assessor in managing the process in the workplace.
- Developing effective customer handling skills.
- Developing an effective understanding of health and safety procedures.
- Determining if the estimates for repairs are fair and accurate.
- Fundamentals and knowledge behind servicing, ability to assess whether additional work is required.



Vehicle Rental Service Technician¹⁴

- Effectively identifying damage on cars.
- Developing effective routine inspections to VOSA standards.
- Effective servicing for Technicians – understanding manufacturer standards.
- Understanding fly by wire technology, internal GPS, vehicle tracking.

Rental Operators/Receptionist/Reservation Agents

- Identifying the needs of customers through effective listening and communication skills.
- Developing effective customer service skills.
- Developing effective telephone techniques.
- Effectively identifying damage on cars.
- Vehicle identification – understanding the different makes and models and awareness of customer expectations.

Management staff

- Understanding health and safety regulations for the workplace.
- Time management for senior management – how to ensure staff manage time effectively.
- Understanding discrimination law and developing policies to address this in the workplace.
- Negotiation skills and how to develop competent staff.
- Leading teams – best practice and how to effectively implement it.

Customer Service Advisors

- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective telephone skills.
- Effective communication for customer service advisors.
- How to deal effectively with complaints.
- Effective sales skills for customer advisors.

Vehicle Sales

The vehicle sales sub-sector employs 111,473 people across 23,520 businesses – the second largest sub-sector, in terms of workforce.

Looking at the European level the UK ranked 4th largest of all new car markets in Europe after Germany, France and Italy. In 2008 the UK was 3rd after Germany and Italy. The UK accounted for 14.1% of all new car sales in Europe in 2009. Year to date in 2010 the UK has contributed 14.3% of all new car sales in Europe, still ranking 4th behind Germany (20.5%), France (17.5%) and Italy (14.5%).

In 2009, a total of 1,994,999 new cars were registered in the UK, a fall of 6.42% compared with 2008 when new car sales were down 11.3% year on year at 2,131,795 units. Commercial vehicle registrations in 2009 stood at 227,543, 36% down on the previous year. Used car sales were marginally less affected falling 5.4% to 6,798,864 units compared with 2008 (7,186,286 unit sales).

In September 2011, the Society of Motor Manufacturers and Traders (SMMT) reported that car registrations were down 0.8% in September at

¹⁴ Only four skill needs are listed for Vehicle Rental Service Technicians.



332,476 units. The SMMT subsequently revised their forecast down by 2.2% on its original full-year estimates, forecasting a 5.3% full-year decrease on 2010 levels. It also reported that retail sales were down 9.3%.

Job roles

The key job roles researched in the vehicle sales sub-sector were: Sales Executive; Management staff and Customer Service Advisors.

Top five skills needs

The top five skills needs (when analysing data from across all research instruments) by key job role are highlighted below.

Sales Executive

- Developing effective selling skills and ensuring the process is customer focussed.
- Understanding the legal implications of inaccurate or misleading information including issues regarding 'duty of care' and 'treating customers fairly'.
- Effective written and verbal communication.
- Effectively developing repeat and referral business.
- Use effective telephone techniques in order to instil confidence, trust and willingness to proceed with a sale.

Management staff

- Maintaining positive customer relations/dealing with complaints.

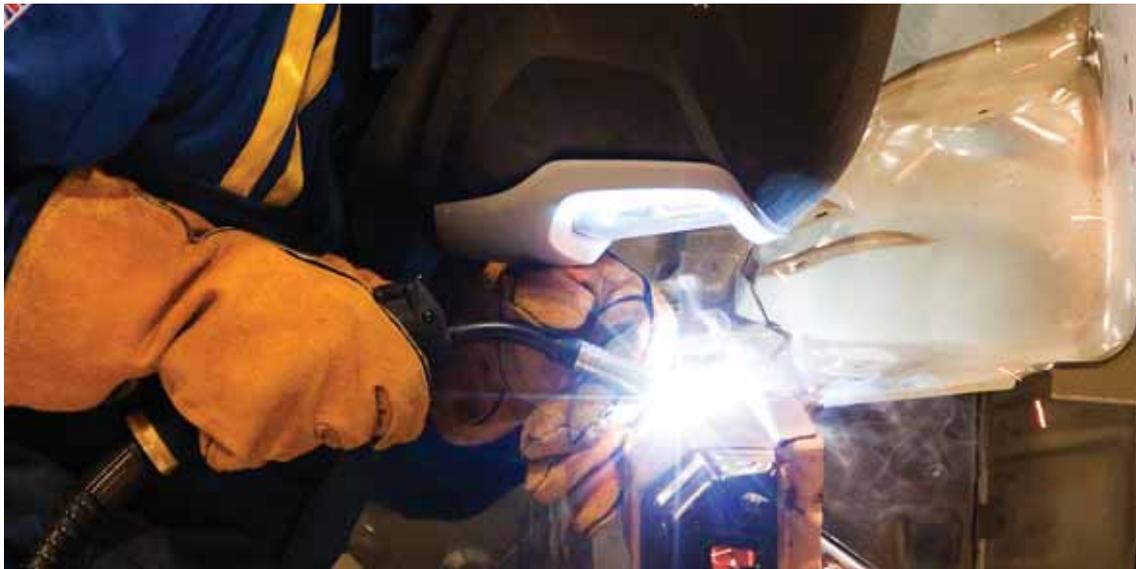
- How to make a profit running an efficient department.
- Effective ways to gain repeat business – driving a 'customer care' culture in the business.
- Understanding how the different parts of the business link together to ensure the business is effective.
- Understanding health and safety legislation and applying it.

Customer Service Advisors

- How to deal effectively with complaints.
- Effective problem solving – dealing with customers to ensure their needs are addressed.
- How to effectively undertake follow up calls following servicing/sales.
- Effective telephone skills for customer advisors, how to collect the right information and link with other teams.
- Effective communication for customer service advisors.

Accident Repair

The training culture in this sub-sector is driven by the need to meet the requirements of PAS125 standards in vehicle repair. Data from this study shows that 60% of companies train when they feel it is necessary compared with 30% who train as part of a business strategy. Training plans and



business plans were common within the sector, with approximately 60% of organisations having these plans. Previous surveys undertaken by the IMI has shown the sub-sector to be satisfied with the skills available.

The research instruments for the accident repair sub-sector are slightly different from the other 11 sub-sectors. Data was analysed from a web survey which was conducted specifically for the accident repair sub-sector (50 in depth questionnaires were completed). These results were then taken to an Expert Working Group¹⁵ which analysed the list of skill needs and arrived at a core list. The core list was then taken to the sub-sector for consultation via an additional web survey.

Job roles

The key job roles researched in the accident repair sub-sector are Vehicle Damage Assessor; Cosmetic Repair Technician; Paint Technician; Panel Technician; MET Technician. As a different research approach was taken in this sub-sector, i.e. a focus on technical skills; the IMI is planning to conduct further research into the skills needs of Management and Customer Service job roles.

Top five skills needs

The top five skill needs, when analysing data from the research methods explained above, by key job role in the accident repair sector are highlighted below.

Vehicle Damage Assessor

- Vehicle appraisal – appraisal of a vehicle to identify the method of repair is correct and in line with manufacturer guidelines.

- Identifying correct methodology for a repair/replacement, including correct materials.
- IT skills for vehicle identity, research, and for estimates of repair.
- Communication and negotiation skills with customers and insurance companies.
- Identify what is likely to have happened in an accident by looking at the damage and the use of photographic sequences for evidence.

Cosmetic Repair Technician

- Vehicle appraisal – appraisal of a vehicle to identify the method of repair is correct and in line with manufacturer guidelines.
- Mechanical Electrical Trim – the replacement of vehicle components and ensure that they function correctly after replacement.
- Rectify panel damage using the appropriate tools, equipment and following the correct repair methods.
- Prepare a panel ready to accept paint primers and top coats.
- Application of top coat to match/blend into existing vehicle paint work.

Paint Technician

- Identify vehicle substrates and products used to repair vehicle.

¹⁵ For accident repair, rather than using a focus groups specifically pulled together for the purposes of this research we used a pre-existing expert working group.



- Sealing and masking of repaired/new panels prior to the application of primers/paint.
- Prepare a panel ready to accept paint (primers and top coats).
- Application of top coat to match/blend into existing vehicle paint work.
- Identify the rectification of paint defects and the procedure to rectify the fault(s).

Panel Technician

- Vehicle panel joining techniques including such functions as welding (MAG/MIG Braze), bonding and riveting.
- Removal and replacement of fixed (welded or other) panels with a vehicle body structure.
- Mechanical Electrical Trim – the replacement of vehicle components and ensuring that they function correctly after replacement.
- Panel alignment, to ensure that a vehicle panel (fixed / cosmetic) aligns with the vehicle structure.
- Vehicle structure alignment using workshop equipment such as a vehicle jig and appropriate workshop tools and equipment.

MET Technician

- The replacement of vehicle components including lighting, suspension components and refilling cooling systems to ensure that they function correctly after replacement (understanding the implications of not carrying this out correctly).
- Alignment of cosmetic panels within a vehicle structure.
- Vehicle electrical system fault finding including the use of electrical test equipment and computer based test equipment.
- Vehicle wheel geometry and the diagnosing of faults.
- Removal and replacement of SRS components such as air bags and other vehicle occupant safety components.

Conclusions

Industry research demonstrates that the sector as a whole has contracted considerably over the past two years. In 2008, there were just under 600,000 people working in the sector as a whole.

Today this figure has fallen to approximately 509,148. The recession continues to impact on the sector and we estimate another two years before the sector shows signs of real recovery.

Previous analysis of employer satisfaction with skill levels indicates small differences between the sub-sectors that fall under the IMI footprint. Accident repair employers are the most satisfied with the skill levels of their employees whilst parts distribution and supply are the least satisfied. Other sub-sectors where employer satisfaction levels are lower than the average includes fast fit operations and vehicle sales.¹⁶

From the research carried out for this report, we can see that 76% of businesses offered formal training in the last two years, but only 57% of businesses plan to provide training over the next two years. Interestingly 49% of businesses feel that training is too expensive this is one of the highest reasons cited for not training. Other reasons for not training include: feeling that training does not improve business performance; being unable to spare staff for training; and lack of good quality local provision.

Particular support needs to be provided to maintenance and repair of heavy vehicles and motorcycles as these sub-sectors have the lowest predicted levels of formal training (46% and 45% respectively). Employers in heavy vehicle maintenance and repair and fast fit are least likely to have a training plan (35% and 30% respectively).

They are also least likely to have a business plan (39% and 40% respectively) or a training budget (28% and 10%).

While we have identified within this summary report, the top five skills needs in each, the sub-sector reports provide a greater level of detail on skills and training needs. Using this research and the 2010 Skills Survey we have identified the following sub-sectors as areas in most need of development:

- parts distribution and supply
- fast fit
- vehicle sales
- heavy vehicle maintenance and repair
- motorcycle maintenance and repair.

The research has also highlighted that there are similarities in skills needs across management and customer service job roles across all sub-sectors.

For **Management**, the following skills needs were identified as key across the majority of sectors:

- understanding and awareness of health and safety legislations (all)
- understanding the customer viewpoint and maintaining positive customer relationships (10)
- people management/How to keep staff effective (8).

¹⁶IMI Employer Survey, 2010

For **Customer Service**, the following skill needs were identified as key across all of the sectors:

- Effective communication skills.
- Effective problem solving – dealing with customers to ensure their needs are addressed.
- Effective telephone skills.
- How to deal effectively with complaints (10).

For **technical skills**, there was less commonality on skills needs. Prior to this research, it was felt that keeping up to date with new vehicle technology was a critical skills need across the majority of sub-sectors. This research has shown that although new vehicle technology is a skills need, it did not feature

as a top five need in any sub-sector. Specific technologies have been highlighted in particular sub-sectors, e.g. keeping up to date with new glass technologies. This validates the decision to research each sub-sector at a job role level.

This research project validates both the anecdotal intelligence that the IMI has been receiving over the past 18-months and the findings from other research carried out for the Labour Force Survey and the IMI's own State of the Sector and Employer Skills Survey reports. As a result, we have a high level of confidence in the findings laid out in this report.

Recommendations

Having completed the most comprehensive review of skills needs ever undertaken by the IMI through this research project, the outcomes will be used to inform the development of training and skills solutions to address immediate and critical skills needs at a sub-sector and job role level across the whole automotive retail sector.

In addition, the research is also informing the Automotive Technician Accreditation (ATA) reaccreditation strategy by providing granular intelligence on the skills needs of accident repair technicians, cosmetic repair, vehicle inspection and light vehicle (Assessed Outcome Module (AOM) development). This intelligence is being used to underpin development of an online CPD management system for ATA Technicians. The work contributes to the IMI wider deliverables as part of Employer Investment Fund (EIF) Phase 1.

This research provides a firm basis to work with our partners to develop solutions to meet skills gaps. The IMI will work with the sector to produce low cost, fit-for-purpose, accessible skill solutions across the sector. Given that 49% of employers cite the cost as a disincentive to train, these solutions will need to be varied to meet particular sub-sector needs and could be delivered online, as well as through traditional face-to-face training. Any skills solutions developed should, where possible, have clear and measurable learning outcomes. This will ensure that employers can easily identify training that delivers value for money for them.

We will work to promote and market training solutions to employers. Given that only 57% of employers plan to train in the next two years, we need to find a creative way to encourage employers to invest in skills development.

Priority should be focussed on the skills needs which will have the biggest impact, i.e. those that

have the capacity to meet the most need with the least input. For this reason, skills solutions to address the common skills needs in management and customer service will be prioritised as well as the top five technical skills need in each sub-sector.

Priority should also be given to developing skills solutions for those sub-sectors with the most critical skills needs¹⁷ and those that are planning to reduce training over the next two years. These sub-sectors are identified as; parts distribution and supply; fast fit; vehicle sales; heavy vehicle maintenance and repair; and motorcycle maintenance and repair.

In summary, we commit to work with partners to:

- Develop high quality, cost effective training, especially in the five priority sectors highlighted above.
- Develop multiple e-learning and virtual classroom learning opportunities.
- Ensure the link between business performance and training is clear.
- Create common solutions to fill the skills gaps in management and customer service, each sub-sector must be able to tailor these solutions to its own needs.
- Develop bite sized learning to reduce the down time needed to attend traditional training course.

¹⁷ For example, the 2010 Employer Skills Survey found that the parts distribution sub-sector has a significant percentage of employers dissatisfied with the present skills available, and with a high level of hard to fill vacancies.

As a SSC we commit to:

- Increase employer investment in skills development by the use of return on investment studies.
- Carry out further research into the skill needs of managers and customer service staff in the accident repair sub-sector.
- Establish the IMI as the place to go to find high quality training provision.
- Further develop the innovative online CPD management system for the sector.
- Create a common template for training in the sector by ensuring that all provision has clear and measurable learning outcomes that link training to increased business performance.

Having experienced great difficulties in obtaining sub-sector business and workforce data in the format that the sector uses, e.g. the break down of vehicle maintenance and repair in to autoglazing, fast fit, vehicle inspection, roadside assistance and recovery, accident repair and light and heavy vehicle, we intend to carry out further research to establish a robust measurement of detailed sub-sector employment statistics.

Our intention is to share these findings with those employers who supported the focus group phase of this research. We aim to engage with these employers, and others to develop skills solutions that meet real employer need.

We would like to express our gratitude to the over 2,000 employers and stakeholders who committed time to participate in this research project and made it possible to understand, for the first time and in detail, the skills landscape across the entire automotive retail sector.

Technical Appendix

Telephone Questionnaire

The Institute of the Motor Industry (IMI)

CPD Employer Survey, September 2011

Introduction

Good morning/afternoon/evening. Could I speak to the person in your business who is most responsible for organising training and recruitment?

Once key individual identified:

Good morning/afternoon/evening. I am calling from BMG Research, a business research company based in Birmingham. I am calling on behalf of the Institute of the Motor Industry often known as IMI. If necessary: This organisation is supported both by the motor industry itself and by government. One of its main purposes is to promote skills development in the motor industry.

IMI wants to understand the skills needs of the sector. Could you spare me 15 - 20 minutes to answer some questions on this for me?

Calls may be monitored for training purposes.

- Your co-operation will ensure that the views expressed are representative of businesses in your industry
- All information collected will be treated in the strictest confidence. Responses will not be attributed to any individual or company
- We work strictly within the Market Research Society Code of Conduct
- Contact at BMG Research is Emma Parry on 0121 333 6006
- The contact at the IMI is Martin Frost on 01992 511521

CONFIRM FROM DATABASE

COMPANY NAME:

Address:

Post code:

Telephone number:

ASK FOR RESPONDENT NAME AND JOB TITLE:

Respondent name:

Mr./Mrs./Ms

Job title:

Profile

ASK ALL:

ASK ALL:

A2 How many people are employed at that site, including managers and all full- and part-time staff based there? **Prompt for number and write in; if doesn't know exactly, prompt for band and code one**

A1 Which of the following activities is your business involved in at that site?

Read out; code all that apply

- | | Number |
|--|-------------------------|
| 1 Motor vehicle sales | 1 1 person |
| 2 Repair and maintenance of light motor vehicles | 2 2-5 people |
| 3 Repair and maintenance of heavy motor vehicles | 3 6-10 people |
| 4 Repair and maintenance of motorcycles | 4 11-20 people |
| 5 Distribution or sales of motor vehicle parts | 5 21-50 people |
| 6 Vehicle rental or leasing | 6 51- 250 people |
| 7 Vehicle inspection | 7 More than 250 people |
| 8 Accident repair | 8 Don't know or refused |
| 9 FASTFIT | |
| 10 AUTOGLAZING | |
| 11 Roadside assistance | |
| 12 Roadside recovery | |
| 13 NONE OF THESE | |
| 14 DON'T KNOW/REFUSED | |

- | | | |
|--|-------------------------|----------|
| | 1 1 person | CLOSE |
| | 2 2-5 people | CONTINUE |
| | 3 6-10 people | |
| | 4 11-20 people | |
| | 5 21-50 people | |
| | 6 51- 250 people | |
| | 7 More than 250 people | |
| | 8 Don't know or refused | |

A3 Can I just confirm, are you the best person to speak to about the skills and training needs?

- | | | |
|---|-----|-----------------------|
| 1 | Yes | CONTINUE |
| 2 | No | ASK TO BE TRANSFERRED |

A4 Do you have a franchise or dealership arrangement with one or more motor vehicle manufacturers? **Code one**

- 1 Yes **CONTINUE**
- 2 No **GO TO A6**
- 3 Other **(write in)**

WHERE YES:

A5 Is this a multi-franchise operation? **Code one**

- 1 Yes
- 2 No

ASK ALL:

A6 Does your business operate just from that site, the one from which you are speaking, or does it operate from other sites as well? **Code one**

- 1 Just one site
- 2 More than one site

ASK IF MORE THAN ONE SITE (CODE 2 AT A6):

A7 How many people are employed across all the sites from which the business operates? **Prompt for number and write in; if doesn't know exactly, prompt for band and code one**

- | | Number |
|---|-----------------------|
| 1 | 2-5 people |
| 2 | 6-10 people |
| 3 | 11-20 people |
| 4 | 21-50 people |
| 5 | 51 - 250 people |
| 6 | More than 250 people |
| 7 | Don't know or refused |

SECTOR (CODE 7):

A8 Which of the following job roles do you have within your business? **READ OUT AND CODE ALL THAT APPLY**

		Yes	No
1	Technicians /	1	2
2	Management staff	1	2
3	Customer service staff	1	2

ASK FOR TECHNICIANS (A8/1/1):

A9A Thinking about your TECHNICIANS staff, for each of the following areas which best describes the skills and training needs of this role? In each case, is there a... **READ OUT OPTIONS AND THEN CODES. CODE ONE FOR EACH**

- 1 CRITICAL NEED
- 2 SOME NEED
- 3 NO NEED

ASK FOR MANAGEMENT STAFF (A8/2/1):

A9B Thinking about your MANAGEMENT staff, for each of the following areas which best describes the skills and training needs of this role? In each case, is there a... **READ OUT OPTIONS AND THEN CODES. CODE ONE FOR EACH**

- 1 CRITICAL NEED
- 2 SOME NEED
- 3 NO NEED

ASK FOR CUSTOMER SERVICE STAFF (A8/3/1):

A9C Thinking about your CUSTOMER SERVICE staff, for each of the following areas which best describes the skills and training needs of this role? In each case, is there a **READ OUT OPTIONS AND THEN CODES. CODE ONE FOR EACH**

- 1 CRITICAL NEED
- 2 SOME NEED

Workforce Training and Development

ASK ALL:

- B1** Does your establishment have a business plan that specifies the objectives for the coming year?

INTERVIEWER NOTES:

- IF RESPONDENT INDICATES THAT ESTABLISHMENT IS COVERED BY A COMPANY WIDE BUSINESS PLAN CODE AS A 'YES'
- CODE AS 'NO' IF IN PROCESS OF DRAWING UP FIRST BUSINESS PLAN, TRAINING PLAN, ETC.
- CODE AS 'YES' IF CURRENTLY HAVE BUSINESS PLAN, TRAINING PLAN, ETC. BUT IN PROCESS OF DRAWING UP NEW ONE.

- 1 Yes
- 2 No
- 3 Dont Know

- 1 Up to £1,000
- 2 £1,001-£5,000
- 3 £5,001-£10,000
- 4 £10,001-£20,000
- 5 £20,001-£30,000
- 6 £30,001-£40,000
- 7 £40,001-£50,000
- 8 £50,001-£60,000
- 9 £60,001-£70,000
- 10 £70,001-£80,000
- 11 £80,001-£90,000
- 12 £90,001-£100,000
- 13 Over £100,000
- 14 Don't know
- 15 Refused

ASK ALL:

- B2** Does your establishment have a training plan that specifies in advance the level and type of training your employees will need in the coming year?

- 1 Yes
- 2 No
- 3 Dont Know

ASK ALL:

- B3** Does your establishment have a budget for training expenditure?

- 1 Yes
- 2 No
- 3 Dont Know

ASK IF YES AT B3:

- B4** How much is this training budget?
PROBE FOR AN APPROXIMATE AMOUNT IF NECESSARY. PROBE FOR ACTUAL AMOUNT FIRST AND WRITE IN. THEN PROMPT WITH BANDS IF ACTUAL AMOUNT NOT KNOWN

ASK ALL:

- B5** Now could you describe how your business (if more than one site add: at that site) generally approaches training and development for staff and managers? Would you say which the following is the best description? **READ OUT AND CODE ONE ONLY**

- 1 The business has a structured training and development as part of its business strategy
- 2 The business formally trains staff and managers whenever it feels it necessary
- 3 The business formally trains staff and managers but only when it is obliged to do so by legislation or regulation
- 4 The business improves skills but only informally, for example, as managers and staff go about their work and meet new situations, or by reading product literature, or just generally by keeping up with industry changes
- 5 The business never or hardly ever trains staff or managers
- 6 Other (**write in**)
- 7 Don't know

IF B5 CODED 4 OR 5:

B6 Could you describe why the business tends not to supply formal training for staff or managers? Which of the following are the main reasons? **READ OUT AND CODE ALL THAT APPLY**

- 1 The business is quite small and all staff and managers are fully skilled for their roles
- 2 You only recruit staff who are fully skilled
- 3 You can't spare staff or management time for training
- 4 You don't feel that training would improve business performance, or not enough to be worth the cost in time and money
- 5 Training courses are too expensive
- 6 You can't find the time to look for appropriate training
- 7 Specific training you might be interested in is not available
- 8 Training you might be interested in is available but not in your area
- 9 You can't find a good quality training supplier
- 10 DO NOT READ OUT: None of the above

IF B5 CODED 4 OR 5:

B7 Is there any other major reason for not training much or at all? Write in or write 'none'

ASK ALL:

B8 Now, thinking about your formal training, by which I mean training that is delivered either on or off the job that is recognised by staff as training and not the sort of learning by experience which could take place all the time. Has any formal training taken place in the last 2 years?

- 1 Yes
 - 2 No
 - 3 Dont Know
-

IF B8 CODED 1 ASK B9:

B9 Which of these did you use to supply that formal training? **READ OUT AND CODE ALL THAT APPLY**

- 1 Product or equipment manufacturer(s) or suppliers
- 2 Private training company
- 3 Further Education College(s)
- 4 University
- 5 Specialist internal training staff
- 6 Industry or trade associations or bodies
- 7 Other (**write in**)

- 8 Don't know

IF B8 CODED 1 ASK B10:

B10 And which of these types of formal training have you used in the last 2 years? **READ OUT AND CODE ALL THAT APPLY**

- 1 Short courses or periods of training, lasting from a few hours to a few days, delivered on company premises
- 2 Short courses or periods of training, lasting from a few hours to a few days, delivered at an off-site location or venue
- 3 Longer courses leading to formal, nationally accredited qualifications
- 4 Formal apprenticeship training
- 5 Formal induction for new recruits
- 6 On-line training delivered via the internet
- 7 Distance learning using written manuals or CDs with course work
- 8 Did you use any other type of formal training? (**write in**)

IF B8 CODED 1 ASK B11:

B11 Could you say which of the following types of staff have received formal training provided or supported by the business in the last 2 years? **READ OUT AND CODE ONE FOR EACH**

		Yes	No
1	Technicians /	1	2
2	Management staff	1	2
3	Customer service staff	1	2

ASK ALL:

B12 Now, thinking about the next two years, do you have any plans to undertake or support any formal training? By formal training, I mean training that is delivered either on or off the job that is recognised by staff as training and not the sort of learning by experience which could take place all the time

- 1 Yes
- 2 No
- 3 Dont Know

IF B12 CODED 1 ASK B13:

B13 Thinking about formal training that you plan to do in the next two years, can you give me an idea of how many people in the business (if applies: at that site) might be involved in that training if it goes ahead? **Write in number; if doesn't know prompt for band and code one**

- | | Number |
|---|-----------------------|
| 1 | 2-5 people |
| 2 | 6-10 people |
| 3 | 11-20 people |
| 4 | 21-50 people |
| 5 | 51 – 250 people |
| 6 | More than 250 people |
| 7 | Don't know or refused |

CATI CHECK </= A2

B14 If any short course training were offered to you, which of the following would be your preferences for delivery method? **Read out all; code up to 2**

- 1 Delivery by an experienced trainer on your premises
- 2 Delivery by an experienced trainer away from your premises
- 3 On-line delivery over the internet, including virtual classroom or webinars and/or e-learning
- 4 Distance learning using manuals or CDs
- 5 Or some other method? **(write in)**

About IMI

ASK ALL:

C1 Before today were you aware of the Institute for the Motor Industry, otherwise known as IMI, the sector skills council for the automotive industry?

- 1 Yes Go to C2
- 2 No
- 3 Dont Know

IF C1 CODE 1 (AWARE OF IMI):

C2 Would you say your understanding of the role and objectives of IMI is...**READ OUT**

- 1 Very detailed
- 2 Fairly detailed
- 3 Not very detailed
- 4 Or do you just know the name only
- 5 (DO NOT READ OUT) Don't know

ASK ALL:

- C3** Do you have any suggestions that an organisation like IMI, should/could be doing to help your business and/or the automotive sector as a whole? **PROBE FULLY. WRITE IN**

ASK ALL:

- C4** Would you be interested in the IMI contacting you to discuss any training and skills issues you might have?

- 1 Yes CONFIRM CONTACT DETAILS:
TELEPHONE, EMAIL, NAME AND JOB TITLE
 - 2 No
 - 3 Dont Know
-

ASK ALL:

- C5** Finally, it is possible that the IMI may want to conduct some further research involving online or face to face focus groups. Would it be OK for them to contact you about this?

- 1 Yes CONFIRM CONTACT DETAILS:
TELEPHONE, EMAIL, NAME AND JOB TITLE
 - 2 No
 - 3 Dont Know
-

That is the end of our questions. Thank you very much for your help with this survey – the information that you have provided will be extremely useful to the IMI.

THANK AND CLOSE

Skills needs survey – in-depth interview script 15 July 2011

Introduction

I'm from BMG Research, a business research company based in Birmingham. We are conducting these interviews on behalf of the Institute of the Motor Industry, often known as IMI. If necessary: This organisation is supported both by the motor industry itself and by government.

IMI wants to understand the skills and training needs are within the Parts Distribution and Supply workforce today and looking forward over the next 2 years, as well as understanding what your most important business needs are.

I'm going to ask you about the specific skills and training need of staff in the job roles that you supply. IMI hope to obtain as much detailed information as possible so that they are able to

provide businesses like you with the right opportunities for helping staff in their continuing professional development (CPD) and put their resources into delivering the most useful products and services.

FOR INFORMATION IF REQUESTED:

All information collected will be treated in the strictest confidence. Responses will not be attributed to any individual or company

We work strictly within the Market Research Society Code of Conduct

Contact at BMG Research is Emma Parry on 0121 333 6006

The contact at the IMI is Martin Frost on 01992 511521

COMPANY NAME:

Address:

Post code:

Telephone number:

Sub Sector

Job Function

First of all, please could you tell me a little about the business?

- Services provided, in particular what are the strongest areas, any specialism etc
- Franchised dealership, independent or other – how many sites exist?
- Geographic area served
- How long in operation
- Number of employees, split between technical and non technical

And could you tell me about your role and main responsibilities?

ASK ALL

Q1 This survey is concentrating on related skills and training needs.

So, can you tell me what types of job roles there are in this area of your business?

PROBE SPECIFICALLY FOR DIFFERENT JOB ROLES

And now, for each job role can you please tell me...?

Parts job roles as provided by respondent	Q2 - What are the current skills and training needs required by (each job role)?	Q3 - Which of these skills and training needs are particularly important or critical to your business?	Q4 - What skills and training needs do you anticipate you will have in the next 2 years.	Q5 - What are your priority business needs now and in the foreseeable future?
1				
2				
3				

Parts job roles as provided by respondent	Q2 - What are the current skills and training needs required by (each job role)?	Q3 - Which of these skills and training needs are particularly important or critical to your business?	Q4 - What skills and training needs do you anticipate you will have in the next 2 years.	Q5 - What are your priority business needs now and in the foreseeable future?
4				
5				
6				

Q6 Would you be interested in the IMI contacting you about this/these training or business needs?

YES

NO

Q7 Finally, it is possible that the IMI may want to conduct some further research involving online or face to face focus groups. Would it be OK for them to contact you about this?

YES

NO

That is the end of our questions. Thank you very much for your help with this survey – the information that you have provided will be extremely useful to the IMI and the industry.

THANK AND CLOSE

Focus groups – response recording sheet

Focus Group	Job Role	Name of organisation
AUTOGLAZING 06.09.2011		
	Managing Director	The Independent Windscreen Academy
	Technical Officer/External Verifier	GQA Qualifications
	Technical Training Manager	AUTOGLASS
	Director/Technician	GLASSTEC Automotive
		FIRSTGLASS Automotive Glazing

Focus Group	Heavy Vehicle	Job Role	Name of organisation
Date	13.09.2011	National Quality Manager VIS	Freight Transport Association
		Quality Manager	Babcock
		After Sales Service Manager	DAF Trucks Limited
		Technical Training Supervisor	MERCEDEZ-Benz UK
		Principal Fleet Engineer	Lancashire County Council
		Company Director	TRUCKSKILLS Ltd.
		Head of Operations	Ryder
		Engineering Manager	Essex Fire Authority
		Technical Engineer	SCANIA Great Britain Ltd.

Focus Group	Light Vehicle	Job Role	Name of organisation
Date	16.09.2011	Training Manager	Babcock
		Managing Director	MOTEST
		Corporate Vehicle Repair Manager	Enterprise Rent-A-Car
			Stephenson College

Focus Group	Motorcycle	Job Role	Name of organisation
Date	19.09.2011	Internal Verification Manager	Remit Ltd
		Training Manager	Suzuki GB Plc
		Technical Manager	Harley-Davidson Europe
		National Training Manager	BMW UK
		Technical Trainer	Kawasaki Motors UK
		Training Manager	PIAGGIO Group

Focus Group	Vehicle Sales	Job Role	Name of organisation
Date	19.09.2011	Sales & Marketing Director	DRIVE Software Solutions Limited
		Training & Learning	EMARBY Consulting
			Manheim Auctions
			BULSTRODE Garages Ltd
			Par Training

Focus Group	Rental & Leasing	Job Role	Name of organisation
Date	21.09.2011	Supply Chain Manager	INCHCAPE Fleet Solutions
		Strategic Fleet Solutions Manager	INCHCAPE Fleet Solutions
		Training and Support Manager	Practical Car & Van Rental
			Ryder UK
			FIMTRAC

Focus Group	Vehicle Recovery	Job Role	Name of organisation
Date	22.09.2011	Network Services manager	AXA Assistance
		Group Training Manager	The Mansfield Group
			AVRO
			AVRO
			LARO

Focus Group	Roadside Assistance	Job Role	Name of organisation
Date	22.09.2011	Learning and Development Manager	Automobile Association
		Training Team Manager	Automobile Association
		Network Services manager	AXA Assistance
			LARO
			AVRO
			AVRO

Focus Group	Fast Fit	Job Role	Name of organisation
Date	23.09.2011	Quality Manager	Babcock
		Head of Learning & Development	KWIK Fit
			Profit from Training Partnership Ltd
			MICHELDEVER
			MICHELDEVER

Expert Working Group	Accident Repair	Name of organisation
Date	12.09.2011	AVIVA
		BASF
		Thatcham College
		Manchester College
		VBRA
		GTG

Expert Working Group	Vehicle Inspection	Name of organisation
Date	13.09.2011	Autologic
		Blackpool and Fylde College
		Hi Q
		GEA
		Premier MOT
		RAC
		S&B Training
		The MOT Doctor
		VOSA
		WG Auto Training

The focus group for parts distribution and supply was held online in September 2011 and comprised representatives from the IFA (Independent Motor Trader Factor Association).

