Objectives

- Conduct two parallel surveys on delivery methods. One with training consumers and another with training providers.

- Establish a base line for future surveys that will help identify trends.

- Draw correlations based upon responses.
Which of these best describes your workplace?

<table>
<thead>
<tr>
<th>Category</th>
<th>2016 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>OE Dealership</td>
<td>32%</td>
</tr>
<tr>
<td>Afmkt/Indpt</td>
<td>47.68%</td>
</tr>
<tr>
<td>Fleet</td>
<td>20.67%</td>
</tr>
</tbody>
</table>
## Participants

### Training Providers

<table>
<thead>
<tr>
<th>Service Type</th>
<th>2016 Percentage</th>
<th>Previous Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>OE Auto</td>
<td>22.37%</td>
<td></td>
</tr>
<tr>
<td>OE Trk</td>
<td>6.58%</td>
<td></td>
</tr>
<tr>
<td>Aftrmkt Manuf</td>
<td>3.95%</td>
<td></td>
</tr>
<tr>
<td>Aftrmkt Serv</td>
<td>14.47%</td>
<td></td>
</tr>
<tr>
<td>Aftrmkt Dist</td>
<td>2.63%</td>
<td></td>
</tr>
<tr>
<td>Fleet</td>
<td>2.63%</td>
<td></td>
</tr>
<tr>
<td>Training Vendor</td>
<td>38.16%</td>
<td></td>
</tr>
<tr>
<td>Tool &amp; Equip</td>
<td>2.63%</td>
<td></td>
</tr>
<tr>
<td>Industry Org</td>
<td>6.58%</td>
<td></td>
</tr>
</tbody>
</table>

### Previous Years

<table>
<thead>
<tr>
<th>Service Type</th>
<th>2015 Percentage</th>
<th>2014 Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>OEM</td>
<td>25%</td>
<td>26%</td>
</tr>
<tr>
<td>Aftrmkt Manu</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>AM Service</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Trng Vendor</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>AM Parts Dis</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Tool and Equip</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Fleet</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>Indus Org</td>
<td>9%</td>
<td>10%</td>
</tr>
</tbody>
</table>
Training Consumer Age Groups

- 55 yrs & up: 38.73%
- 45-54 yrs: 31.03%
- 35-44 yrs: 17.18%
- 25-34 yrs: 10.88%
- 18-24 yrs: 2.19%
Age Groups

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>55 yrs &amp; up</td>
<td>38.73%</td>
<td>34.80%</td>
<td>33.98%</td>
</tr>
<tr>
<td>45–54 yrs</td>
<td>31.03%</td>
<td>33.16%</td>
<td>36.38%</td>
</tr>
<tr>
<td>35–44 yrs</td>
<td>17.18%</td>
<td>18.32%</td>
<td>17.59%</td>
</tr>
<tr>
<td>25–34 yrs</td>
<td>10.88%</td>
<td>11.67%</td>
<td>10.16%</td>
</tr>
<tr>
<td>18–24 yrs</td>
<td>2.19%</td>
<td>2.05%</td>
<td>1.89%</td>
</tr>
</tbody>
</table>

Age Groups:
- 18–24 yrs
- 25–34 yrs
- 35–44 yrs
- 45–54 yrs
- 55 yrs & up
By Workplace

OE | Indpt | Fleet
---|---|---
55 yrs & up | 38.24% | 41.40% | 33.50%
45–54 yrs | 30.23% | 27.81% | 37.56%
35–44 yrs | 16.53% | 16.55% | 19.54%
25–34 yrs | 9.20% | 14.90% | 8.62%
18–24 yrs | 2.48% | 2.62% | 0.76%
Prior to entering your occupation, did you have any vocational or technical school education?

- No: 30.92%
- Yes: 69.08%
Prior to entering your occupation, did you have any vocational or technical school education?

- OE: No 30.30% Yes 69.70%
- Indpt: No 34.07% Yes 65.93%
- Fleet: No 24.62% Yes 75.38%
Who Pays for Training?

- **Shared**
  - 2016: 15.41%
  - 2015: 15.28%
  - 2014: 15.02%

- **Employer**
  - 2016: 64.13%
  - 2015: 65.01%
  - 2014: 68.24%

- **Employee**
  - 2016: 20.46%
  - 2015: 19.71%
  - 2014: 16.53%
### Who Pays for Training?

- **OE**
  - Shared: 14.25%
  - Employer: 77.19%
  - Employee: 8.55%

- **Indpt**
  - Shared: 17.13%
  - Employer: 52.41%
  - Employee: 30.61%

- **Fleet**
  - Shared: 16.16%
  - Employer: 64.64%
  - Employee: 19.19%
Do you have a way to determine deficiencies in your knowledge of the skills required for your job?

- **Yes**
  - 2016: 66.19%
  - 2015: 67.03%
  - 2016: 67.18%

- **No**
  - 2016: 33.81%
  - 2015: 32.97%
  - 2016: 32.83%
Do you feel as though you have access to the training you need?
2016

- Yes: 65.59%
- No: 34.41%
Do you feel as though you have access to the training you need? (Techs)

- **OE**
  - Yes: 64.64%
  - No: 35.36%

- **Indpt**
  - Yes: 59.80%
  - No: 40.19%

- **Fleet**
  - Yes: 51.17%
  - No: 48.82%
Which of these are factors in your inability to get the necessary training? (pick up to 5)

- Availability of Right Trng: 73.8%
- Lack of quality training: 52.2%
- High cost of training: 49.6%
- Inability to take time off: 38.9%
- Excessive travel distance: 28.4%
- Lack of required equipment: 23.3%
- Unwilling to sacrifice my time: 12.9%
- Lack of internet access: 3.8%
- Other: 13.0%

2016
<table>
<thead>
<tr>
<th>Category</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hybrid/EV</td>
<td>50.3%</td>
<td>54.7%</td>
</tr>
<tr>
<td>Elec/Electronic</td>
<td>52.1%</td>
<td>52.3%</td>
</tr>
<tr>
<td>Adv Eng Perf</td>
<td>47.9%</td>
<td>48.7%</td>
</tr>
<tr>
<td>Auto Trans</td>
<td>37.0%</td>
<td>37.8%</td>
</tr>
<tr>
<td>Eng Perf</td>
<td>30.5%</td>
<td>33.7%</td>
</tr>
<tr>
<td>CNG Fuel Sys</td>
<td>21.8%</td>
<td>23.8%</td>
</tr>
<tr>
<td>Eng Repair</td>
<td>23.7%</td>
<td>24.4%</td>
</tr>
<tr>
<td>HVAC</td>
<td>20.5%</td>
<td>19.3%</td>
</tr>
<tr>
<td>Business Mgt</td>
<td>13.1%</td>
<td>13.7%</td>
</tr>
<tr>
<td>Str &amp; Susp</td>
<td>14.7%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Category</td>
<td>2016</td>
<td>2015</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------</td>
<td>-------</td>
</tr>
<tr>
<td>Manual Trans</td>
<td>12.5%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Brakes</td>
<td>10.8%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Cust Service</td>
<td>8.1%</td>
<td>7.9%</td>
</tr>
<tr>
<td>Compliance</td>
<td>6.3%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Maintenance</td>
<td>5.8%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Collsn Repr</td>
<td>5.6%</td>
<td>5.7%</td>
</tr>
<tr>
<td>Sales</td>
<td>5.2%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Paint &amp;...</td>
<td>4.5%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Collsn estimat</td>
<td>3.5%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Parts Dist</td>
<td>3.2%</td>
<td>4.1%</td>
</tr>
</tbody>
</table>

Where are your training needs the greatest?
OE’s training needs

<table>
<thead>
<tr>
<th>Category</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hybrid /Ev</td>
<td>45.5%</td>
</tr>
<tr>
<td>Elec/Electronic</td>
<td>45.5%</td>
</tr>
<tr>
<td>Adv Engine</td>
<td>41.6%</td>
</tr>
<tr>
<td>Auto Trans</td>
<td>35.5%</td>
</tr>
<tr>
<td>Eng Perf</td>
<td>22.0%</td>
</tr>
<tr>
<td>Eng Repair</td>
<td>22.0%</td>
</tr>
</tbody>
</table>
Independent’s training needs

- Hybrid / Ev: 54.3%
- Elec/Electronic: 48.0%
- Adv Engine: 48.0%
- Auto Trans: 34.7%
- Eng Perf: 31.2%
- CNG fuel systm: 21.5%
What percentage of the training that you receive comes from each of these delivery methods?

- Classrm Instr-led
- Lab Instr-led
- Online, Instr-led
- Coach/Mentor...
- Video Learning
- Self Paced E-Lrng
- Self Paced Printed
- Virtual Simulation
- Mobile Learning
- Informal Learning
- Other

Providers
Consumers Preferred
Consumers Actual
What percentage of the training that you receive comes from each of these delivery methods? For 2014, 2015 and 2016

Classrm Instr-led
Lab Instr-led
Online, Instr-led
Coach/Mentor...
Video Learning
Self Paced E-Lrng
Self Paced Printed
Virtual Simulation
Mobile Learning
Informal Learning
Other

2016
2015
2014
What percentage of the training that you receive comes from each of these delivery methods? Fleet, Independent, OE
By Age Group – How would you prefer to receive your training?

Classroom Instr-led

Lab Instr-led

Online, Instr-led

Coach/Mentor

OTJ

Video Learning

55 and older

45–55

35–44

25–34

18–24
By Age Group – How would you prefer to receive your training?

- Self Paced E-Lrng
- Self Paced Printed
- Virtual Simulation
- Mobile Learning
- Informal Learning

Categories:
- 55 and older
- 45–55
- 35–44
- 25–34
- 18–24
Classroom, Instructor-led

How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't use this...

![Bar chart showing responses from Providers and Consumers]

- Providers
- Consumers
Lab, Instructor-led

How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't use this

Providers vs. Consumers
Virtual Classroom, Online Instr-led
How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't Use This

![Bar Chart]

- Providers
- Consumers
Coach/Mentor, On-the-Job

How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't Use This

[Bar chart showing responses for providers and consumers]
Video Learning
How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't Use This

Providers
Consumers
Self Paced E-Learning

How do you see this changing in the next 12 to 18 months?

- **Substantial Increase**
- **Some Increase**
- **About the Same**
- **Some Decrease**
- **Substantial Decrease**
- **Don't Use This**

Providers vs. Consumers
Self Paced Printed Manual
How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't use This

Providers
Consumers
Virtual Simulation

How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't use This

Providers
Consumers
Mobile Learning
How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- N/A

[Bar chart showing percentages for Providers and Consumers]
Informal Learning
How do you see this changing in the next 12 to 18 months?

- Substantial Increase
- Some Increase
- About the Same
- Some Decrease
- Substantial Decrease
- Don't Use This

[Bar chart showing percentage of providers and consumers for each category]
COMMENTS… QUESTIONS?
Available to Members on the website:

- Summary Reports for each survey
- PDF of MS PowerPoint slides

Available to Members by request:

- Excel or Access files containing complete data for each survey

Available to Non-Members on the website:

- Summary Reports for each survey for a limited time
- PDF of MS PowerPoint slides