

ADDRESSING AUTOMOTIVE SKILLS SHORTAGES

SUMMARY REPORT

May 2022



STRATEGIC OBJECTIVE

AAAA, AADA and MTAQ are working together to address the growing demand for skilled automotive technicians by identifying opportunities to improve the automotive apprenticeship experience that can increase apprentice intake and retention outcomes, and ultimately keep technicians within the industry over the longer term.

CONTENTS

This summary report provides key insights into four specific cohorts within the apprentice body. Each of them stands out in terms of their unique experiences, expectations, and needs.

1ST YEARS

Their time in the industry might be short, but they are happy with their **career prospects**, and enjoying their **training**.

With that said, **low pay** rates are already a challenge, as well as **repetitive tasks**.

They do however find the workplace enjoyable, and are looking to remain in the industry as they work towards the ultimate goal of becoming a **master technician**.

4TH YEARS

4th year apprentices are less **satisfied**, with concerns around **career prospects**, **level of training** and **L&D opportunities**.

Despite many considering **leaving the industry**, they have stayed (with the support of family and friends).

It has however shifted their thinking to the **business side of workshop operations**, suggesting a level of interest in opening their own shop once they qualify.

WOMEN

Whilst we don't have many female apprentices, those we have are highly **satisfied**, and **committed to the profession**.

Despite this, the **lack of diversity remains** challenging, with **their gender making their journey more difficult**.

Positively, this doesn't change their mind – they plan to **stay in the industry long-term**. They will however leave an employer if they don't believe it's the right environment for them.

CAREER CHANGERS

Career changers are forward thinkers who want to learn about **new technologies** and how they will impact the automotive industry.

They are however less engaged with some aspects of the apprenticeship, ideally wanting the **flexibility** to reduce the **length (and potentially also tailor the content)** of their studies.

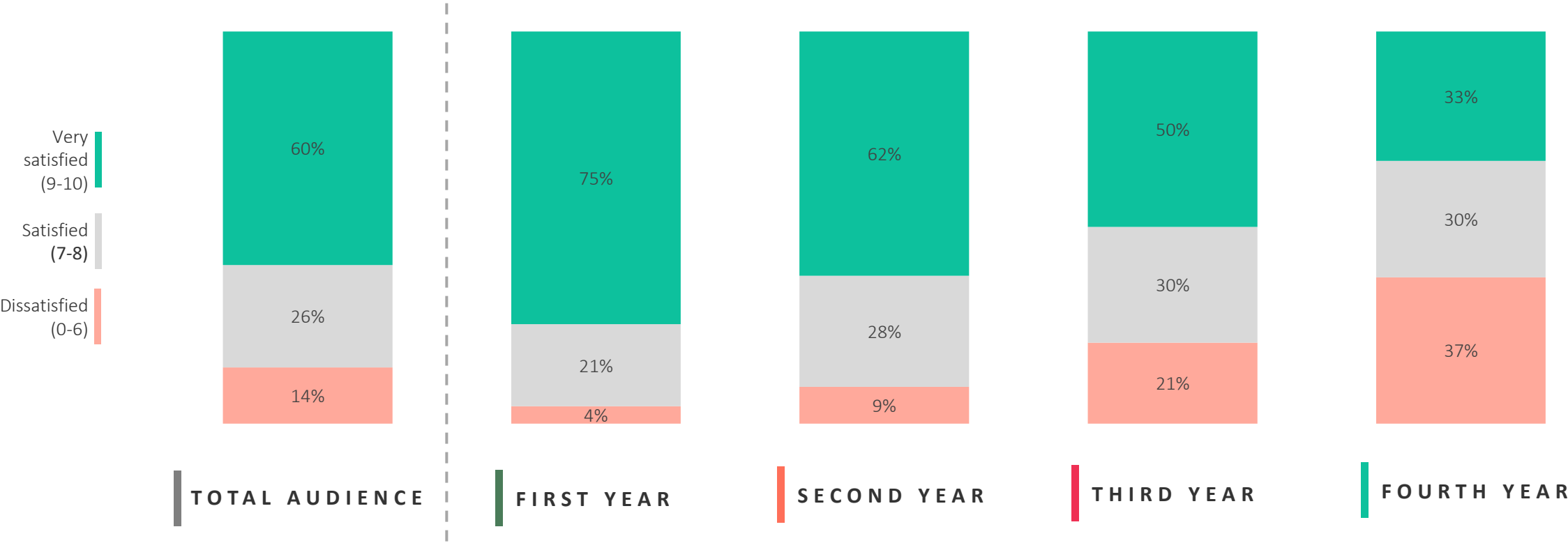
1st YEAR APPRENTICES



OVERALL SATISFACTION WITH APPRENTICESHIP

First year apprentices are highly satisfied with their experiences so far

How satisfied are you overall with your apprenticeship?

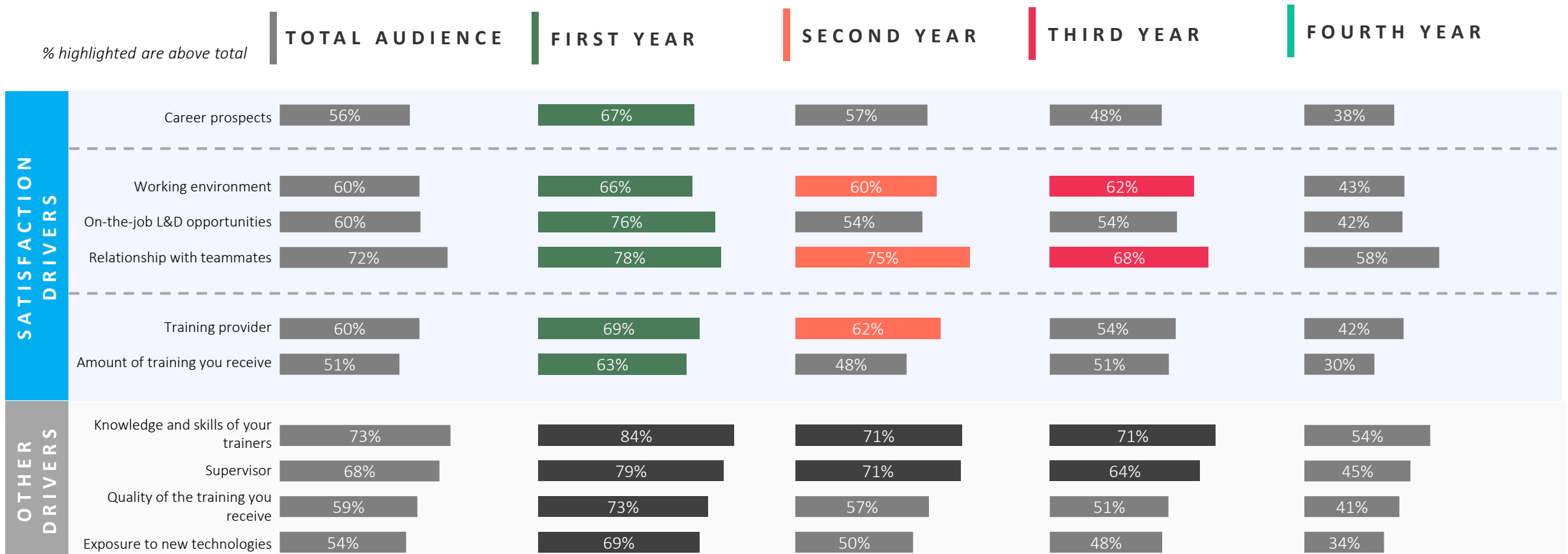


The apprenticeship experience is clearly delivering well in the early stages, but does then decline as they move further along (particularly in the 3rd and 4th year)

DRIVERS OF APPRENTICESHIP SATISFACTION

All elements of their apprenticeship are working together to deliver these positive outcomes, with 1st years enjoying the workplace, the on-the-job learning, and the more formal training delivery

How satisfied overall are you with...?



Apprentices at this early stage are highly engaged with the industry, particularly enjoying their experiences within the workplace

IMPROVEMENTS TO APPRENTICESHIP

Despite this, 1st year apprentices do see some potential to improve the initial phase of their apprenticeship, particularly when it comes to getting hands on with the work right from the beginning, and having someone specific they can look to for support

What would you change to improve the first six-months of an apprenticeship?



35%

HANDS ON WORK

1. Hands on work – 32%
2. Variety of work – 5%

Apprentices feel they need a better initial understanding of basic theory. This foundation can then be developed through more hands-on, one-on-one training with more experienced mechanics.

“Giving the apprentice more hands-on experience in the beginning to ensure they have selected the right career”
– School Leaver



28%

LEARNING SUPPORT

1. Having a mentor – 7%
2. One-on-one training – 7%
3. Support for development – 6%

Apprentices feel as though being taken under the wing of an experienced mechanic for one-on-one training would benefit their initial 6-months.

“Have supervisors come around and see how well you have learned new things each week, ticking off some sort of checklist.”
– Career Changer



10%

HAPPY WITH THE CURRENT SET UP

Despite most apprentices having suggestions to help better their initial experience, 10% express that they wouldn't change anything.

“I've had great opportunities to experience what the automotive industry has to offer so that you know what you are in for and what to expect for the next part of your career”
– Career Starter

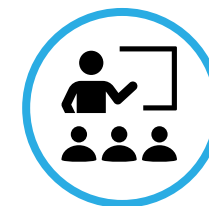


9%

BETTER PAY

The issue of low pay for apprentices is not a new issue. Most feel that an incentive of a higher hourly rate will help accommodate the costs associated with starting an apprenticeship.

“Better pay and more support to ensure apprentices stay within the trade”
– Career Starter



9%

TRAINING

1. Pre-training– 3%
2. More TAFE– 2%
3. Universal apprentice schedule/handbook – 2%

Heading into an apprenticeship, newcomers feel they need a secure way to “learn the ropes” before starting the course. This would ideally be delivered through TAFE.

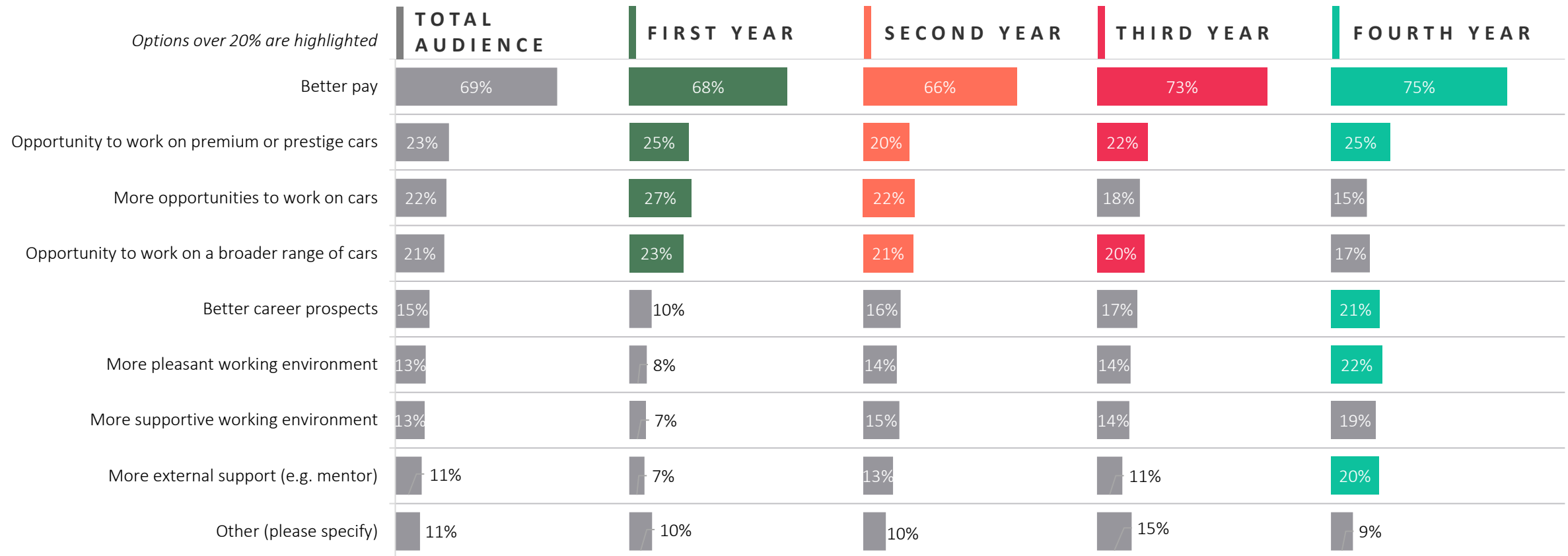
“We would benefit from a more controlled training and not just throwing the apprentice in the deep end straight away.”
– School Leaver

This suggests potential for a more formalised mentorship program, that can give apprentices someone to whom they can talk openly and honestly about their experiences, including any concerns they might have

DRIVERS OF SATISFACTION

Pay rates are also a concern from the beginning (and throughout the apprenticeship); the desire for more hands on work is also evident in their desire to work on a broader range of cars, including more premium or prestige ones

Which, if any, of the following would increase your satisfaction with your apprenticeship?



Apprentice pay consistently emerges as an issue, suggesting it needs to be addressed at an industry level to raise the bar and remove any disincentive to enter this sector; workshops also need to ensure that apprentices are being exposed to both a range of different tasks and a range of different vehicles in their day-to-day work

4th YEAR APPRENTICES

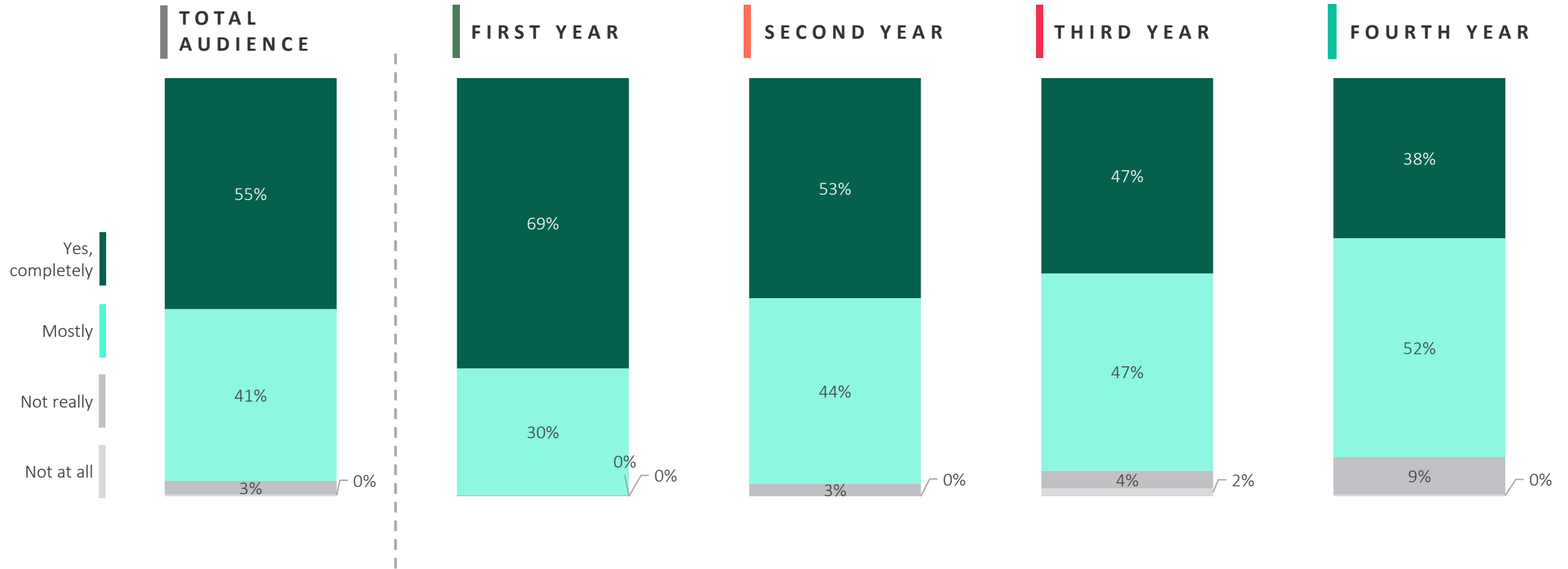


2

MEETING EXPECTATIONS

Later stage apprentices are clearly somewhat unsure about the direction their work and training experiences have taken, with a level of misalignment to what they expected

Is the job what you expected?

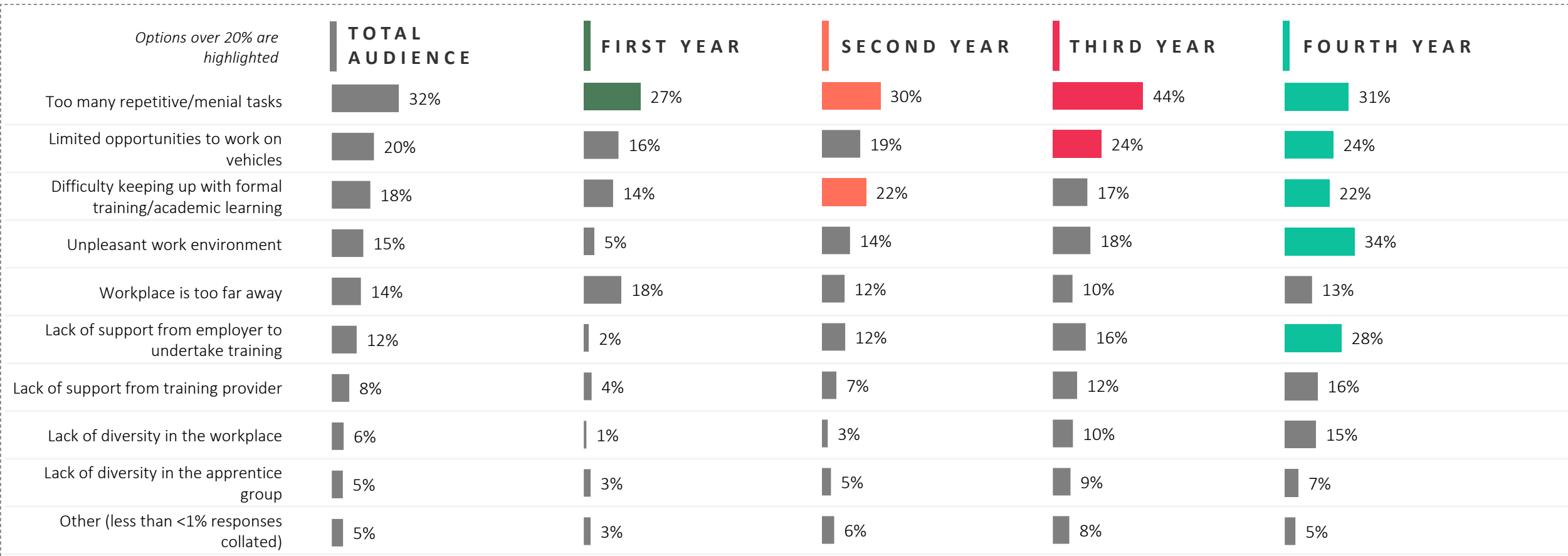


Apprentices could potentially benefit from greater transparency around the journey on which they're embarking, and the key milestones they would be expected to reach at certain stages in the process

CHALLENGES THROUGHOUT

This is potentially reflected in some of the concerns expressed by this cohort around the level of support they receive from their employer, and the work environment itself

What challenges did you experience during your apprenticeship?

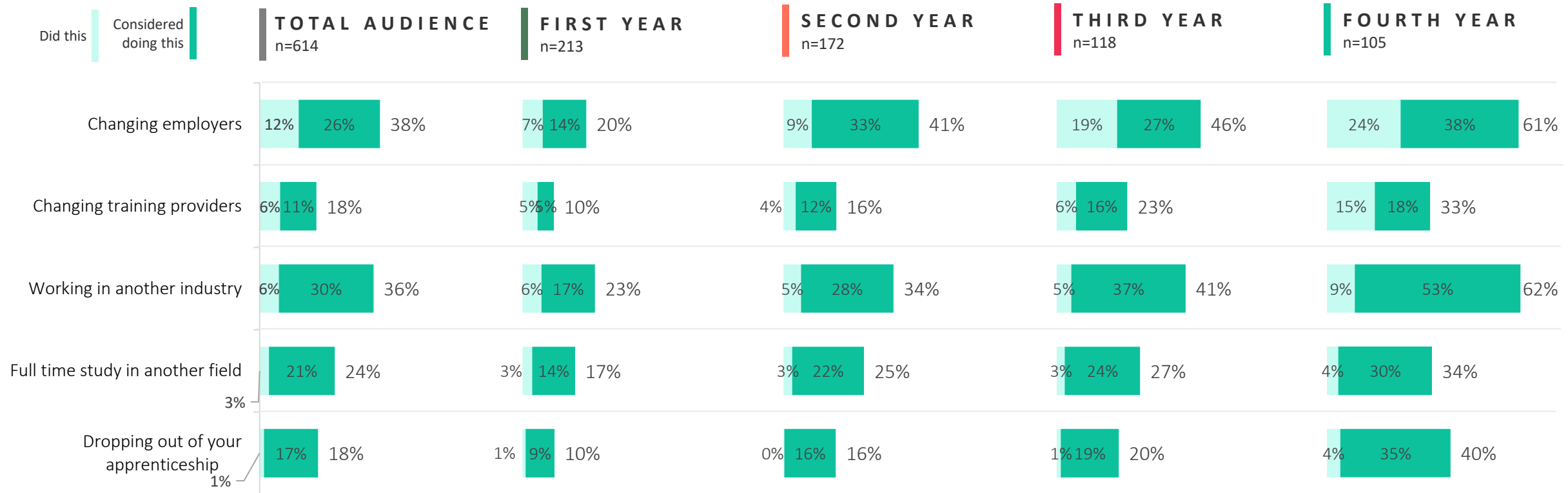


Workshops need to ensure that later stage apprentices are supported to find the right balance between working on vehicles, workplace learning, and their formal studies

CONSIDERATION FOR A CHANGE IN WORK ENVIRONMENT

It is concerning (but probably not surprising) that many third and fourth year apprentices are therefore considering changing employers, working in another industry, or (less commonly) just dropping out of their apprenticeship entirely

Which, if any, of the following have you considered doing, or done during your apprenticeship?

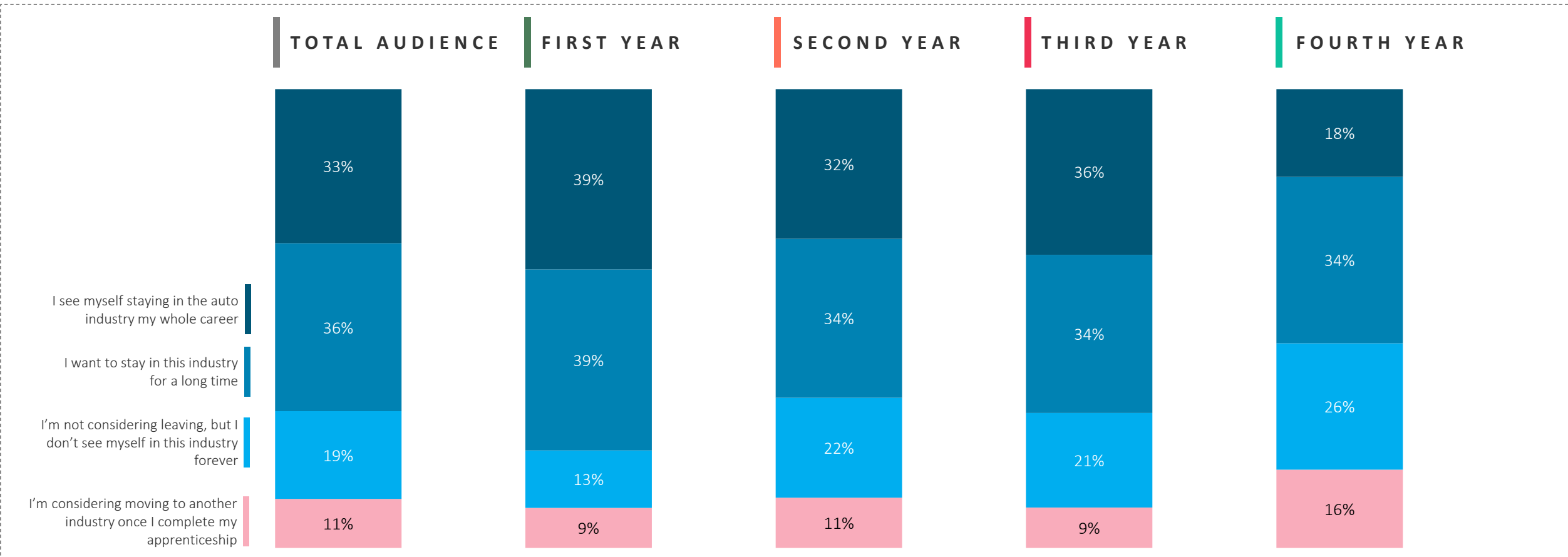


The value of the experience and learning outcomes doesn't appear evident to apprentices moving into the later stages of their training

FUTURE OUTLOOK

Given these challenges, it is positive to see that most fourth-year apprentices expect to remain in the industry beyond the completion of their qualifications, with more than half still expecting a long-term career in the automotive sector

Thinking about your future, which of the following best describes you?

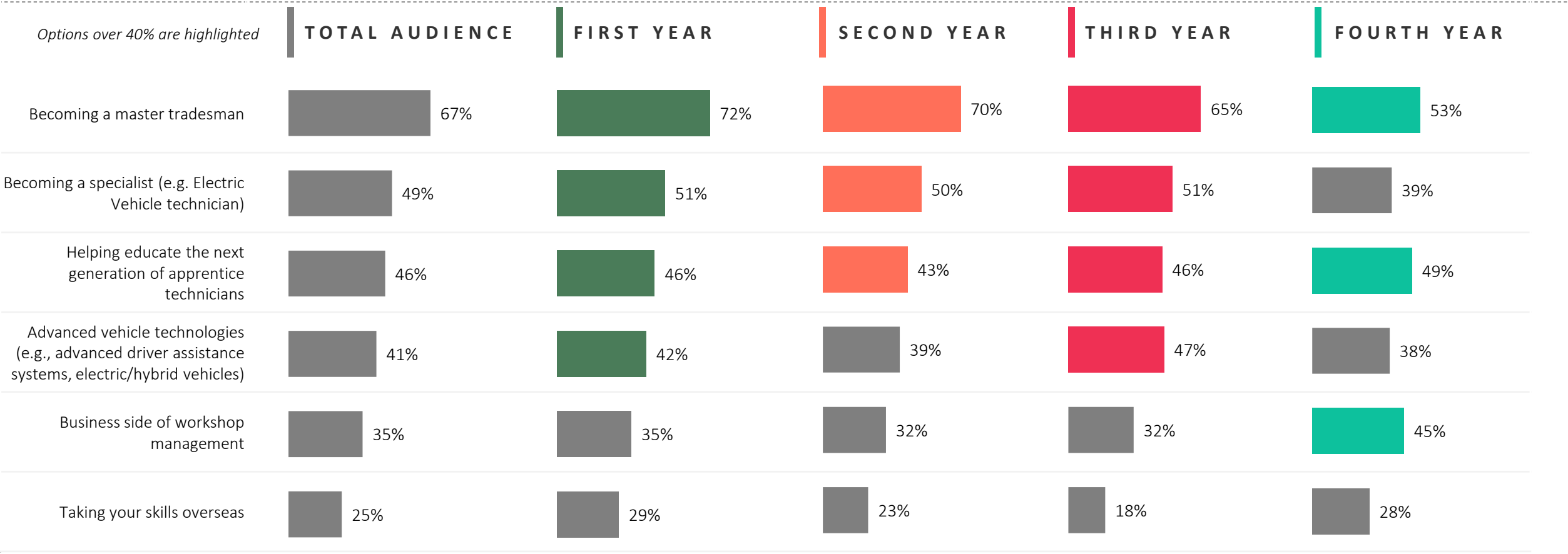


This suggests that despite some negative experiences there is still an opportunity to retain them over the longer term

APPRENTICE INTERESTS

We can also see that apprentices reaching the later stages of their training become much more interested in the business side of operating a workshop

How interested are you in the following? (Extremely interested)



This suggests many apprentices have a goal of workshop management or ownership (either in the short or longer term), so would benefit from training and ongoing support to build skills that are relevant to this objective

FEMALE APPRENTICES

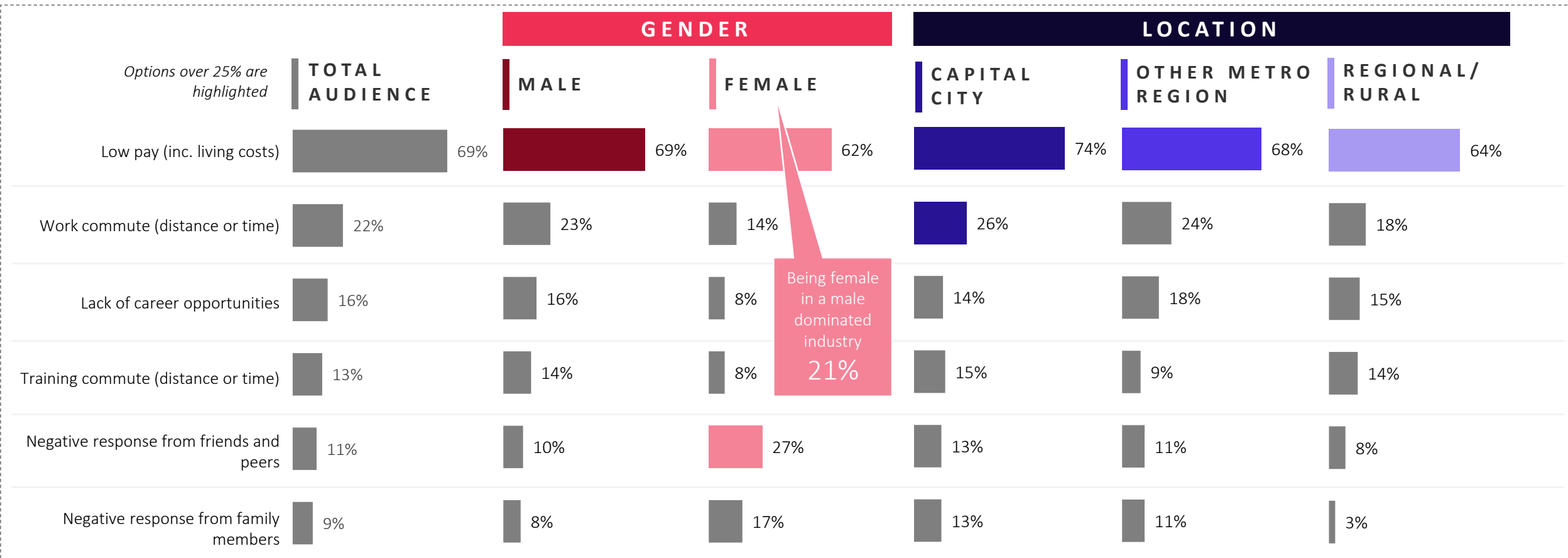


3

TOP CHALLENGES UPON STARTING APPRENTICESHIP

Entering the automotive sector appears more confronting for women than men, as they face off against traditional stereotypes, both within the workshop, and amongst their family and friends

What challenges did you have to overcome when starting out on this pathway?

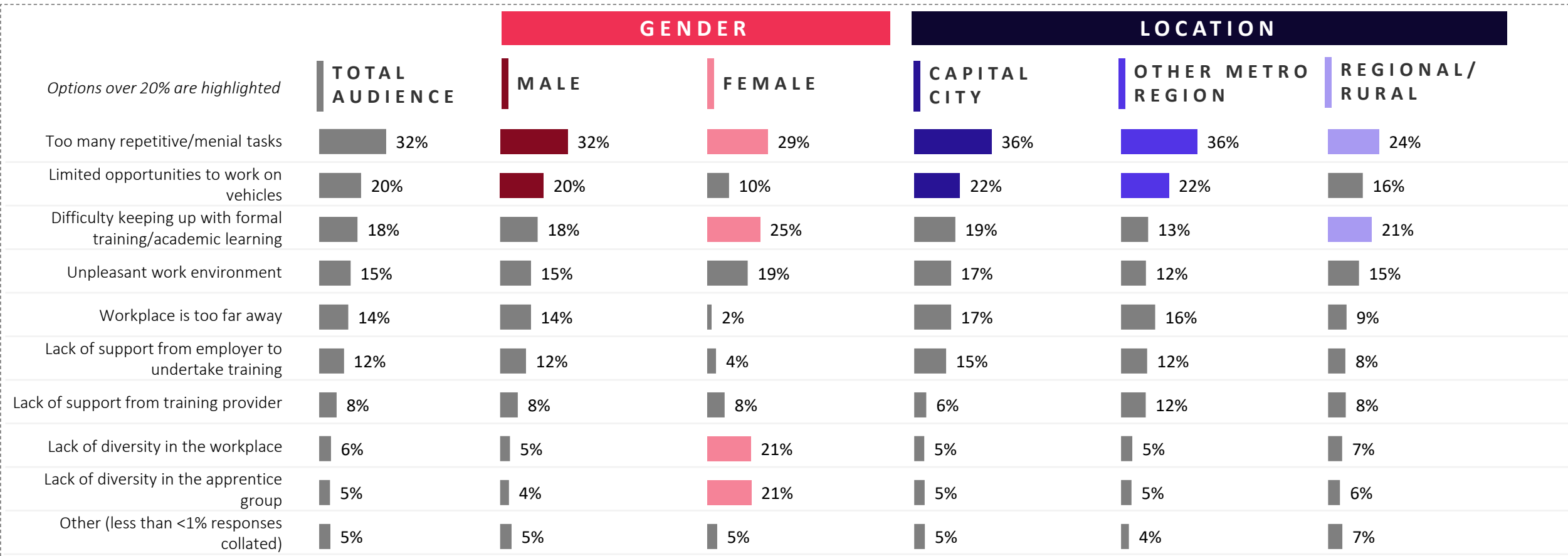


We need to reduce (and ultimately remove) the barriers to entry into the industry that are deterring women beyond this highly engaged cohort

CHALLENGES THROUGHOUT

Women also experience a broader range of challenges as they move through their apprenticeship, talking to the lack of diversity within their peer group, and the workplace more broadly

What challenges did you experience during your apprenticeship?

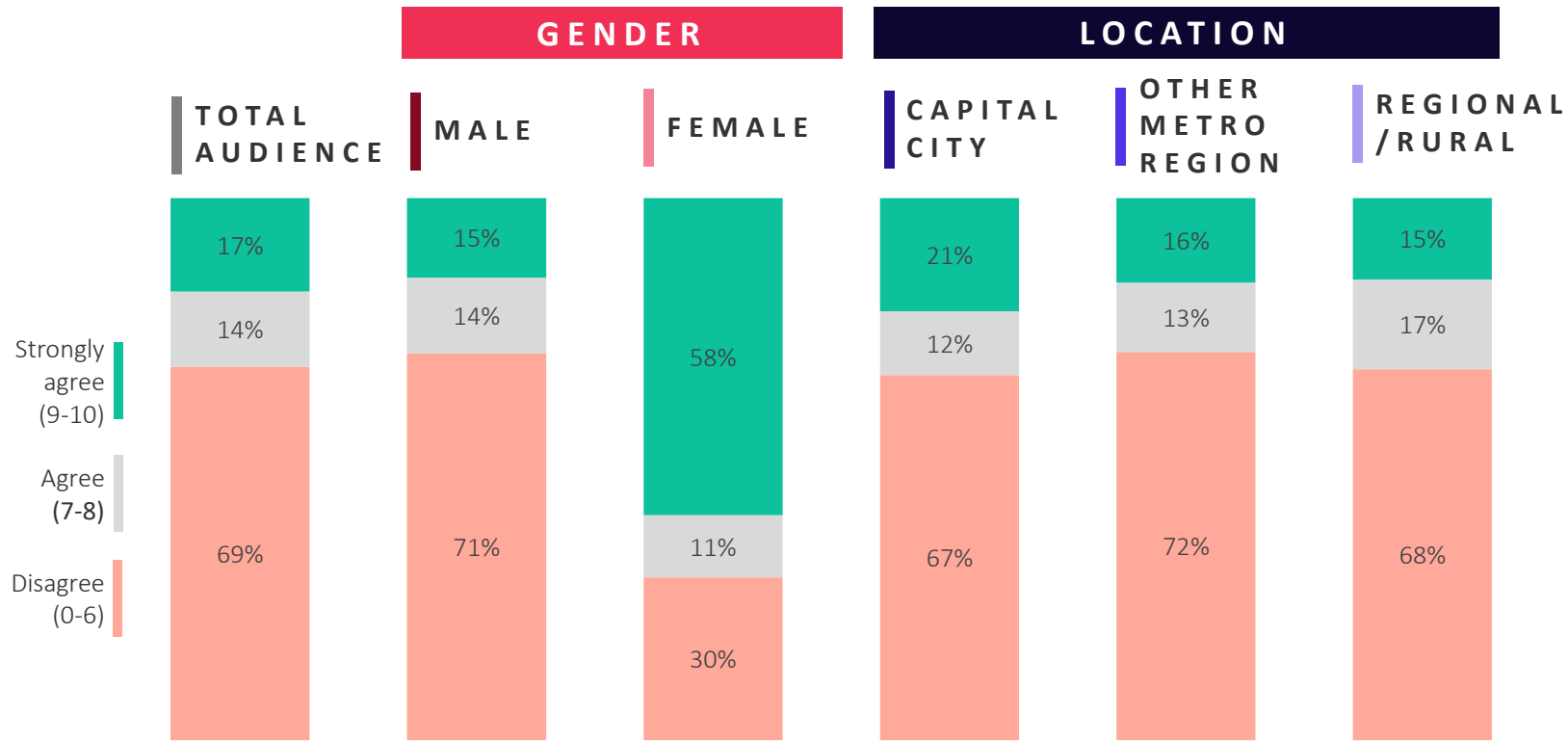


This cannot be fixed in the short term, so the focus should instead be on providing the most comfortable environment possible for women and any other apprentices from non-traditional backgrounds

APPRENTICE PERCEPTION | GENDER EQUALITY

This means that our female apprentices are those who have overcome a level of adversity to succeed; this is further highlighted by the fact that one in four of them have felt the need to switch employers during the course of their studies

It is harder for a female apprentice to succeed than a male one

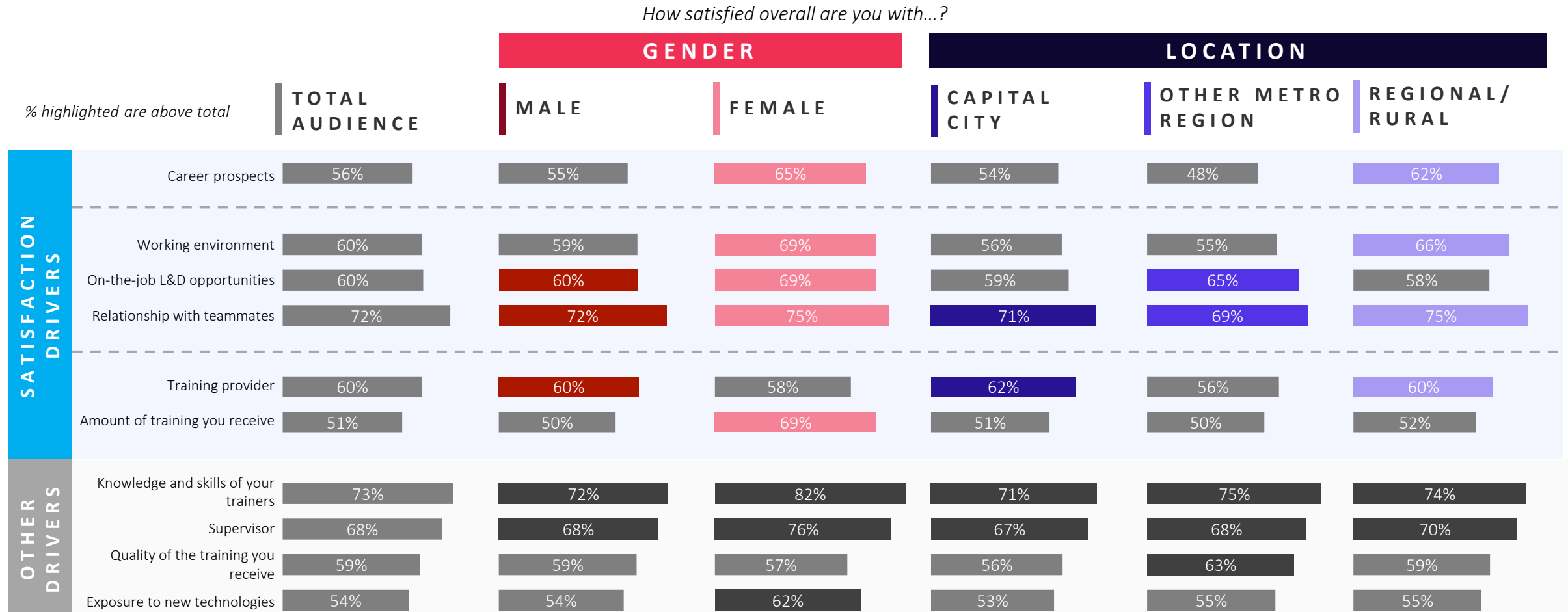


25%
OF FEMALE APPRENTICES HAVE CHANGED EMPLOYERS (VS. 11% OF MALE APPRENTICES)

The experience of being a female apprentice in a male-dominated environment is clearly still not ideal; this also raises questions about how many have dropped out, or never started on the journey?

DRIVERS OF APPRENTICESHIP SATISFACTION

Despite this, female apprentices appear to be obtaining better outcomes in most areas than their male counterparts

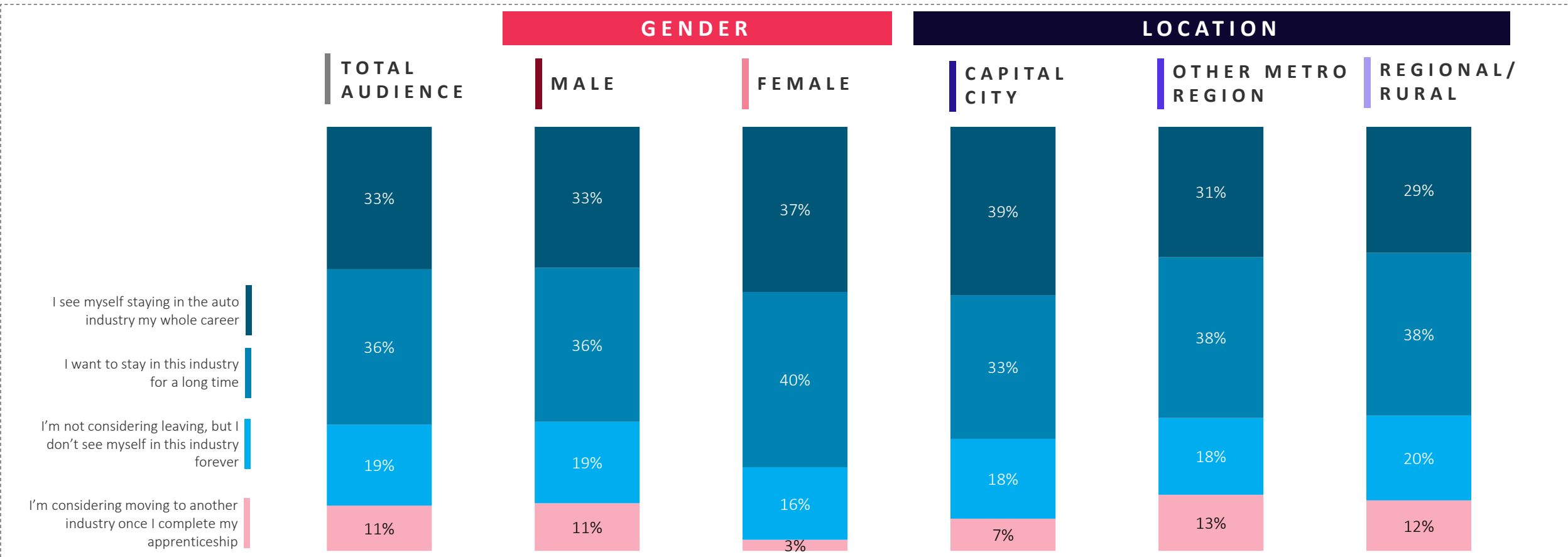


The gender difference suggests that while the absolute number of female apprentices remains limited, there is a cohort that are being actively engaged and well supported through their apprenticeship – the question is how we can both share their stories more broadly, and ensure other female apprentices receive similar treatment

FUTURE OUTLOOK

Our female apprentices also remain more committed to their career path, almost universally expecting to remain in the sector beyond the completion of their qualifications

Thinking about your future, which of the following best describes you?



Given the level of commitment shown by these women, the industry needs to ensure that it facilitates their progression as best possible to visibly create positive outcomes that can help smooth the way for future candidates

CAREER CHANGERS

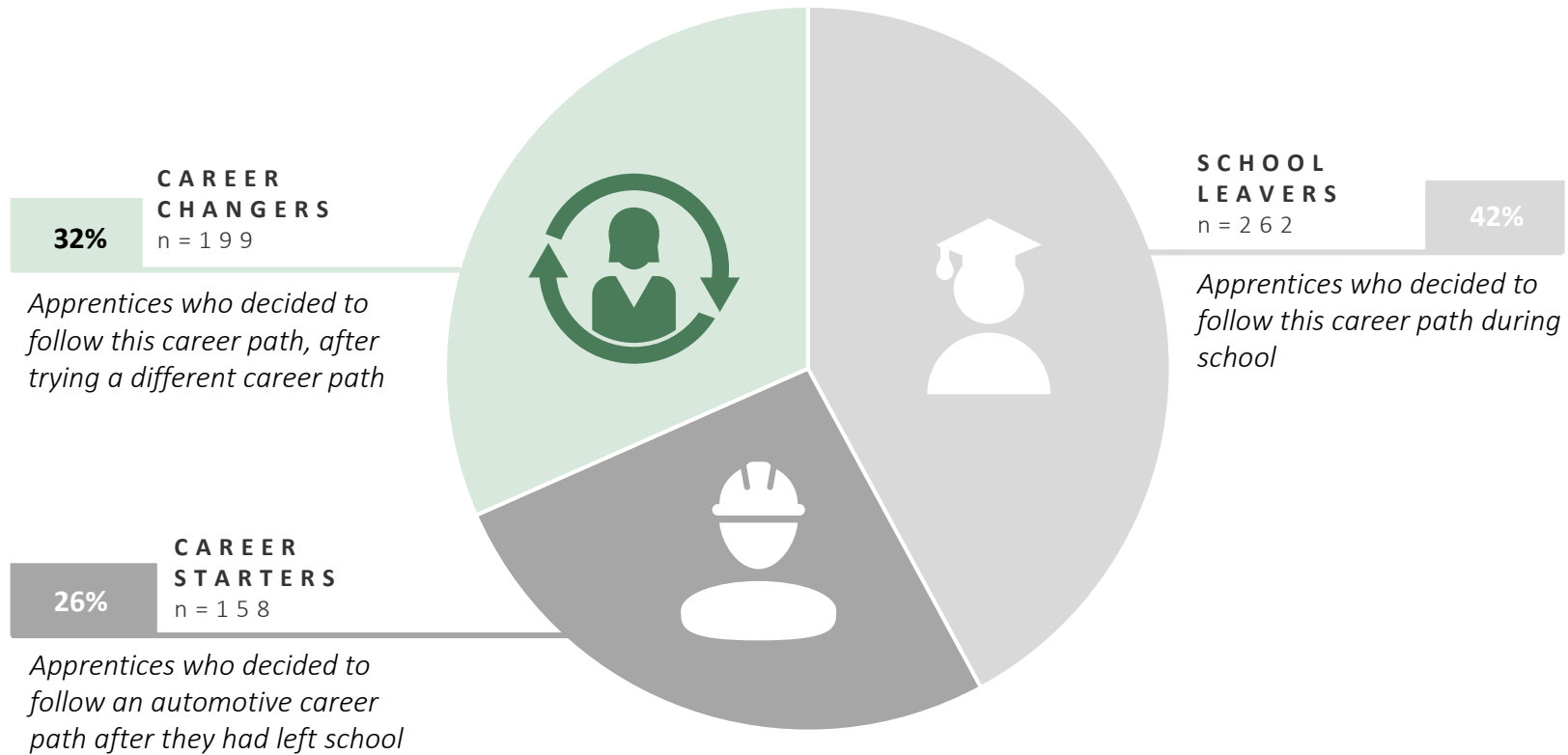
4

A photograph of two men in a workshop. The man in the foreground is wearing a dark blue polo shirt and is focused on a laptop placed on the engine of a car. He is using a mouse with his right hand. The man in the background is also wearing a dark blue polo shirt and is leaning over, working on a car. The scene is lit with dramatic, low-key lighting, highlighting the men's faces and the car's engine. A blue circle with the number 4 is overlaid on the right side of the image.

DECISION POINT

Within our sample, we can identify apprentices who made the decision to enter this career path after trying a different vocation first

When did you decide to have this career path?

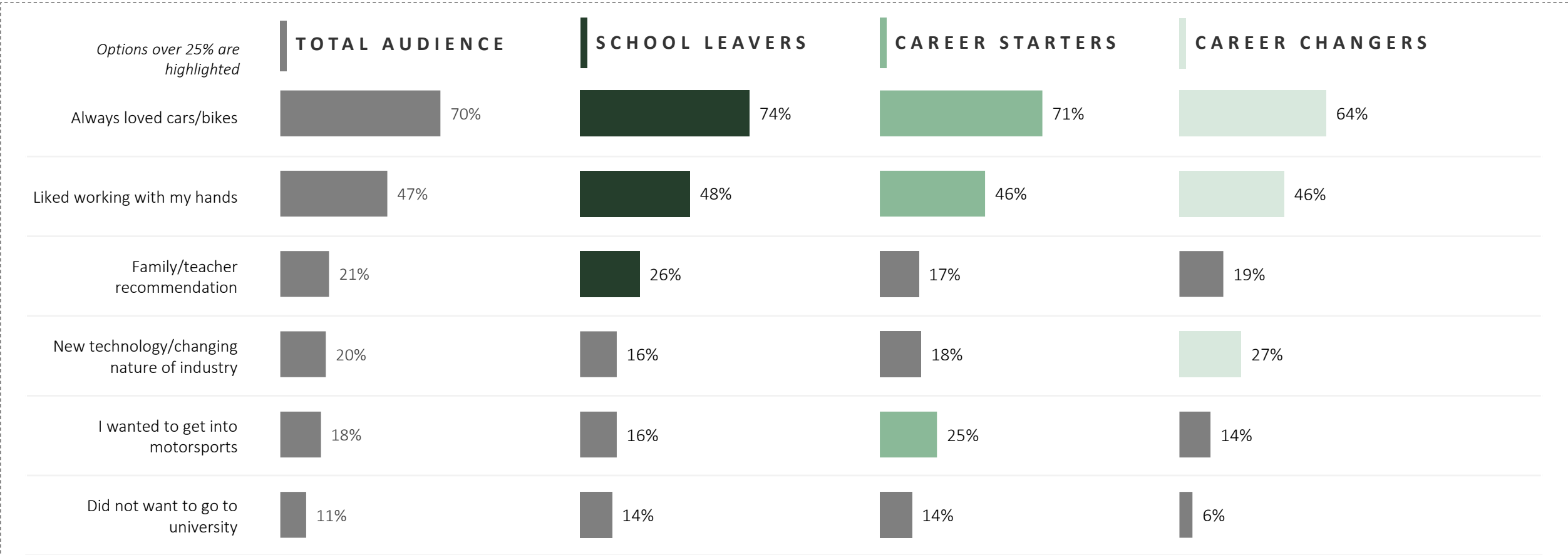


This subgroup has different influences, needs, and expectations as they move into an automotive apprenticeship

ATTRACTION TO THE AUTOMOTIVE INDUSTRY

Career Changers were attracted to a career in the automotive sector as it aligned with their love of vehicles and enjoyment of working with their hands, while also offering the opportunity to be exposed to new innovations and cutting-edge technologies

What attracted you to this pathway?



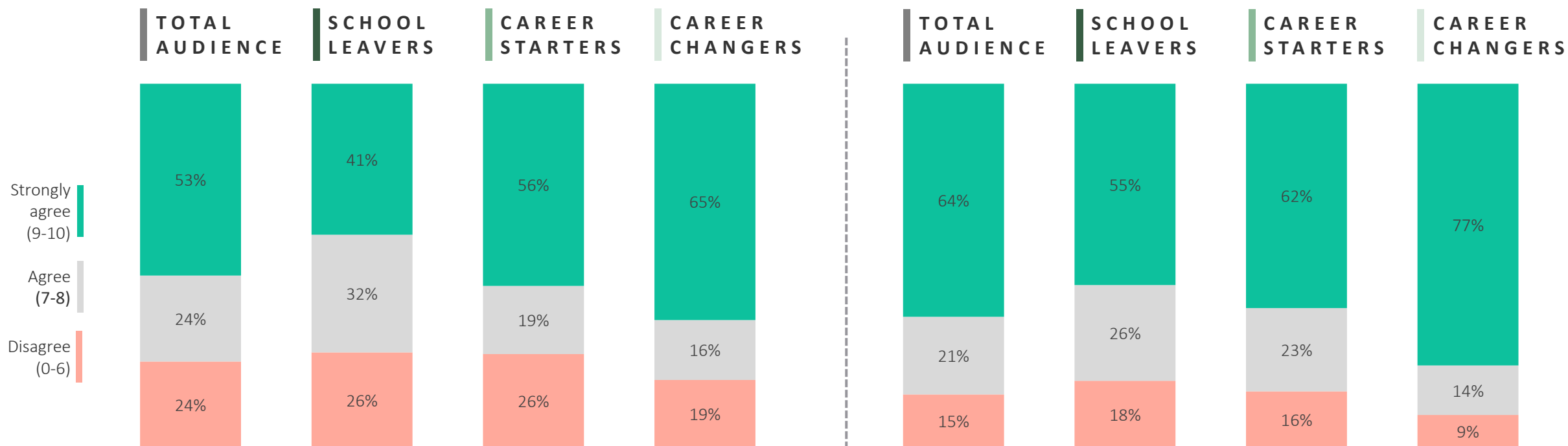
While there are some common elements with other groups (i.e. loving working on cars / working with their hands), the focus on technology means this will need to be included in their training for them to remain engaged

APPRENTICE PERCEPTIONS | NEW TECHNOLOGIES

Career changes therefore expect the industry to adapt and innovate in response to upcoming technological changes

I would like more exposure to new technologies during my apprenticeship

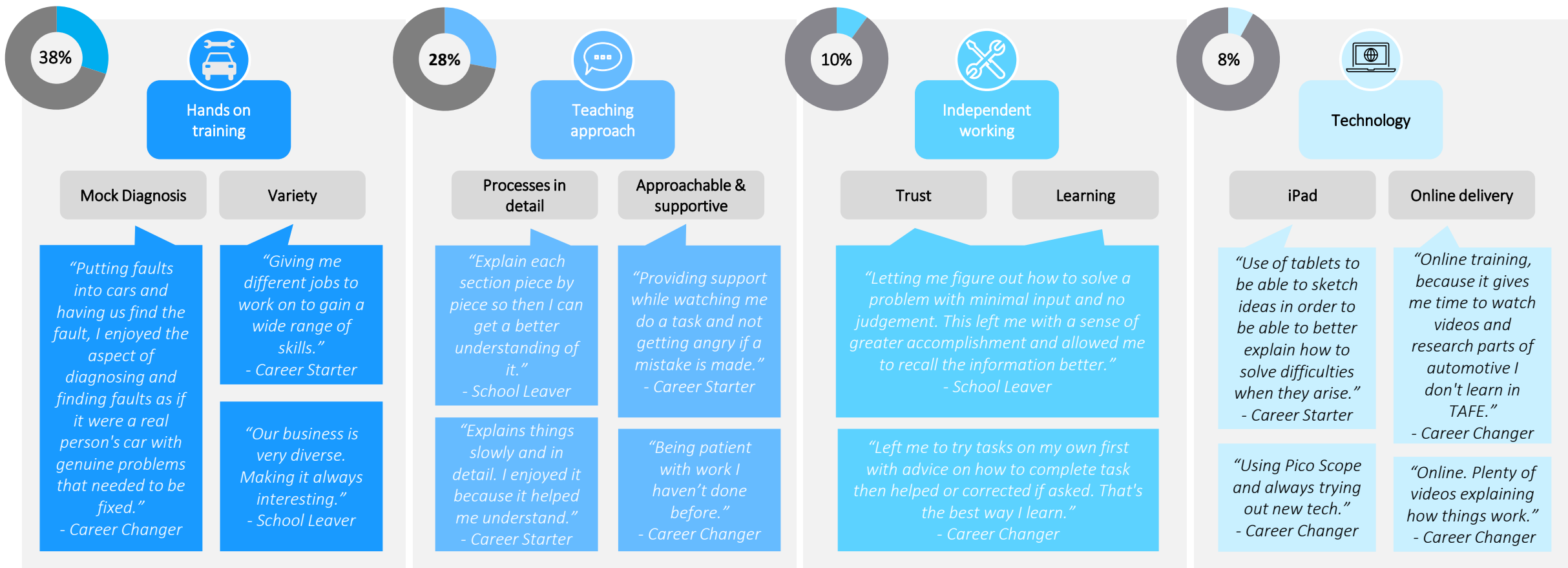
I think it is important for us to adapt to technological changes



The significant level of technological innovation within the industry suggests that this desire can be met through education on existing work (as against suggesting the industry itself needs to change in terms of its usage of new technologies)

INNOVATIVE TRAINING APPROACHES EXPERIENCED

Looking at their current experiences (as well as those of the broader apprentice cohort), there are some really compelling examples of how training delivery can incorporate new technologies, while also providing a safe environment in which to learn

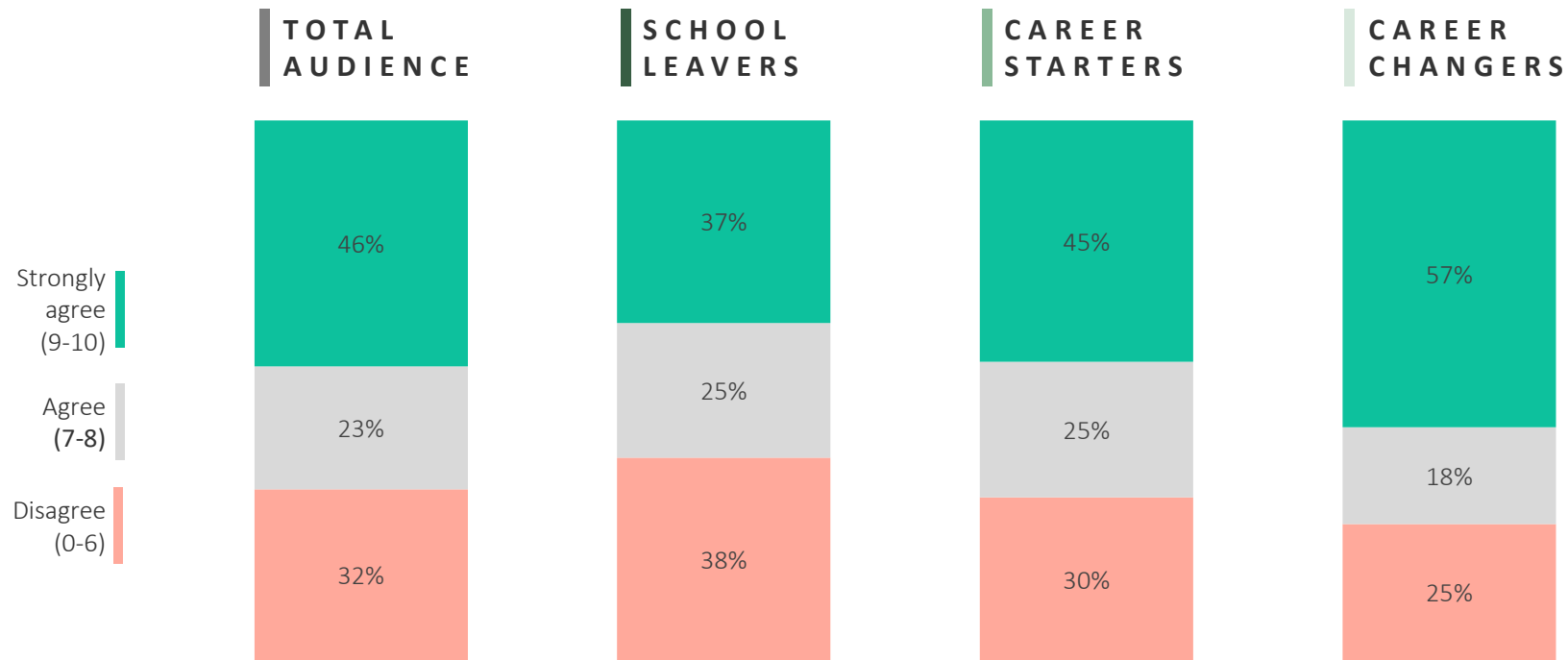


Some of these ideas (e.g. mock diagnosis) can help with ideas around new or different training modules, with the feedback also reminding us that apprentices will have different needs – some will prefer a great level of direction, while others will prefer a more self-guided (potentially online) approach to learning

APPRENTICE PERCEPTIONS | NEW TECHNOLOGIES

Career Changers are however less engaged with the 'standard' apprenticeship program, with most of them interested in being able to complete their apprenticeship (or the elements of it that they feel are most relevant) in a shorter period of time

I would like the flexibility to complete my apprenticeship in a shorter period of time

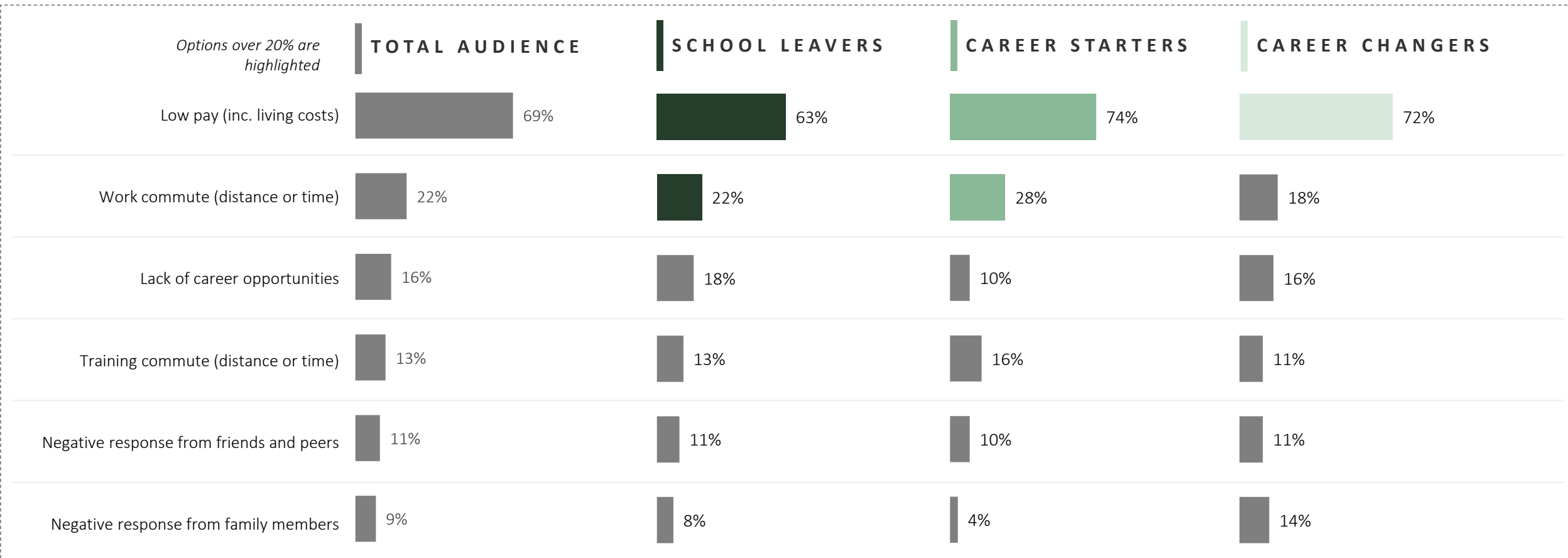


This suggests that there is an opportunity for shorter, modular training modules that can provide a tangible sense of progress

TOP CHALLENGES UPON STARTING APPRENTICESHIP

Career Changers do also face a significant barrier in terms of the low pay rates (suggesting they would in many cases be taking a step backwards)

What challenges did you have to overcome when starting out on this pathway?



The industry does need to improve here, ensuring that pay is not a disincentive to entering or remaining within the industry

VIGNETTES

5



1st YEAR APPRENTICES

KEY TAKEAWAYS

1st year apprentices display a high level of **excitement** about their role. Their time in the industry might be short, but so far their **expectations have been met**, they are happy with the **career prospects** ahead of them, and are enjoying their **training**.

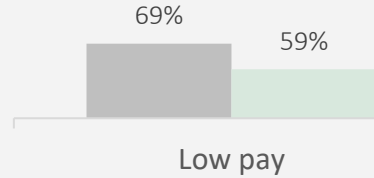
With that said, **low pay** rates are already emerging as a challenge, while **repetitive tasks** is an ongoing problem. However, they find the workplace enjoyable, and feel they are being provided with a **pleasant and supportive environment**. This results in them looking to stay in the industry for a long period of time, with the goal of becoming a **master tradesman**.

The cohort is very excited about the **technological advancements** in the industry, so **opportunities** to be involved with tech will keep satisfaction high!

ENTERING THE INDUSTRY

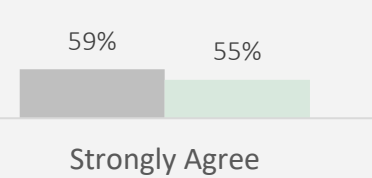
BIGGEST CHALLENGE WHEN STARTING OUT

1st Year vs Total Audience



WOULD LIKE TO BE PAID MORE

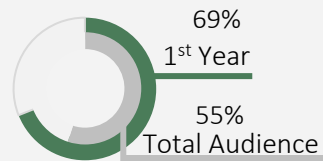
1st Year vs Total Audience



ONGOING EXPERIENCE

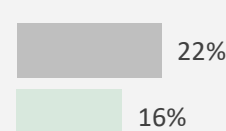
IS THE JOB WHAT YOU EXPECTED?

Yes, completely



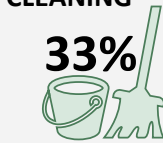
APPRENTICES FACE HOSTILE WORK ENVIRONMENTS?

Strongly agree



% OF TIME SPENT CLEANING

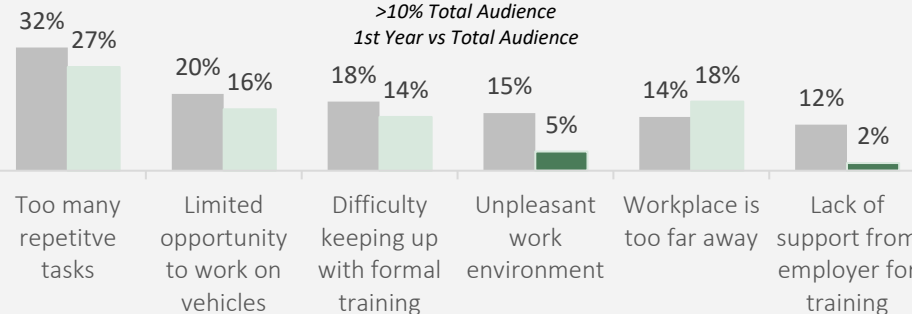
33%



vs 24%/17%/13% (2nd/3rd/4th)

CHALLENGES EXPERIENCED

>10% Total Audience
1st Year vs Total Audience



CONSIDERING LEAVING

ACTIONS CONSIDERED....

1st Year vs Total Audience



14% vs 26%
Changing employers



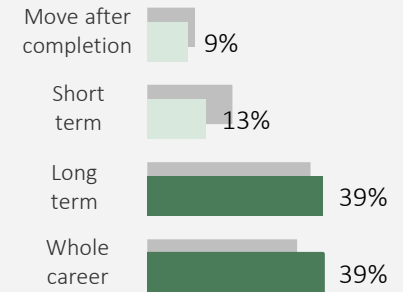
17% vs 30%
Working in another industry



9% vs 17%
Drop out of apprenticeship

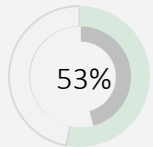
INTENDED LENGTH IN THE AUTO INDUSTRY

1st Year vs Total Audience



APPRENTICESHIP PERCEPTION

Strongly agree (9-10)

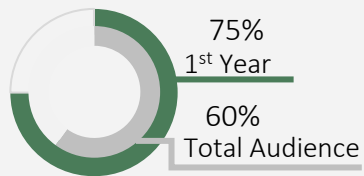


Shorter apprenticeship

APPRENTICESHIP SATISFACTION

OVERALL APPRENTICESHIP SATISFACTION

Very satisfied (9-10)



MOVERS & SHAKERS

Largest differences satisfaction vs Total Audience



LOOKING TO THE FUTURE



60% vs 51%
Excited about

TECHNOLOGICAL ADVANCEMENTS

1st Year vs Total Audience
Strongly agree (9-10)



71% vs 64%
Important to adapt to

72%

of 1st years are extremely interested becoming a master tradesman. (vs. 67% of total audience)

4th YEAR APPRENTICES



KEY TAKEAWAYS

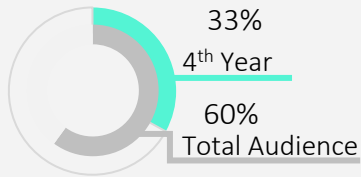
4th year apprentices are the **least satisfied** with their experience, with concerns around their **career prospects, level of training and L&D opportunities**. On top of this, they feel that they are **underpaid**, and **aren't supported by their employer to undertake training**.

Positively, despite more than half of this cohort having considered **leaving to work in another industry**, and one in three considering **dropping out**, they have decided to stay (typically supported by family and friends).

It has however shifted their thinking, with 4th year apprentices more interested in the **business side of workshop operations**, suggesting they're considering the potential to run their own shop, rather than remaining an employee under someone else.

APPRENTICESHIP SATISFACTION

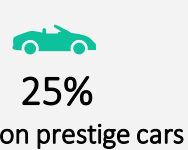
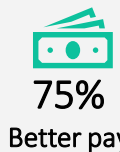
OVERALL APPRENTICESHIP SATISFACTION
Very satisfied (9-10)



MOVERS & SHAKERS
Largest differences satisfaction vs Total Audience

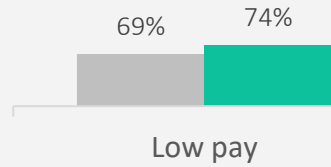


WHAT WOULD INCREASE SATISFACTION?
4th Year - Top 2

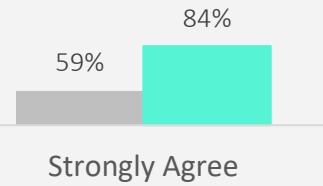


ENTERING THE INDUSTRY

BIGGEST CHALLENGE WHEN STARTING OUT
4th Year vs Total Audience

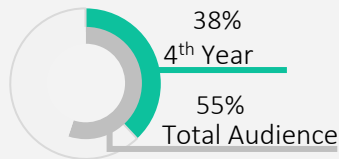


WOULD LIKE TO BE PAID MORE
4th Year vs Total Audience

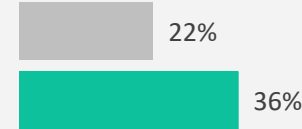


ONGOING EXPERIENCE

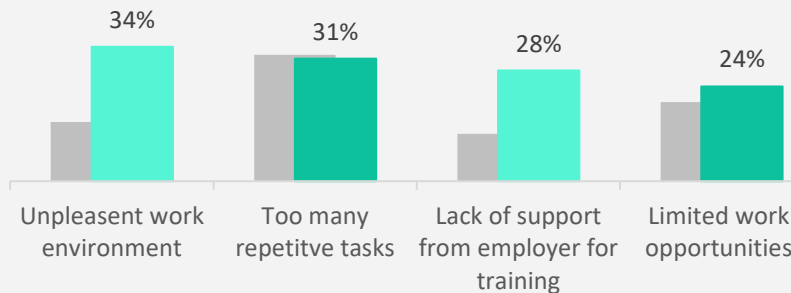
IS THE JOB WHAT YOU EXPECTED?
Yes, completely



APPRENTICES FACE HOSTILE WORK ENVIRONMENTS?
Strongly agree

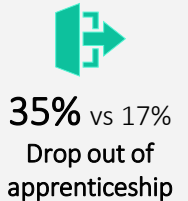
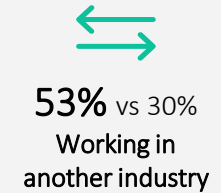


TOP 4 CHALLENGES DURING APPRENTICESHIP

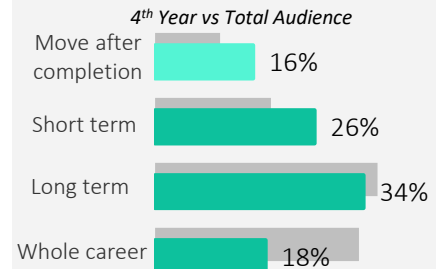


CONSIDERING LEAVING

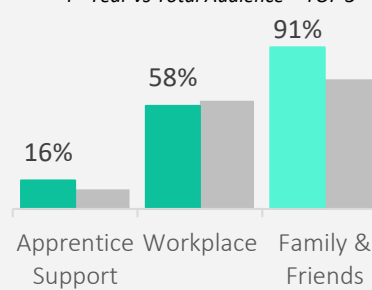
ACTIONS CONSIDERED....
4th Year vs Total Audience – TOP 3



INTENDED LENGTH IN THE AUTO INDUSTRY
4th Year vs Total Audience

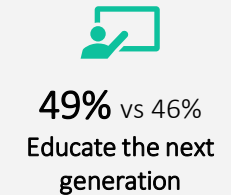


SUPPORT NETWORK
4th Year vs Total Audience – TOP 3



LOOKING TO THE FUTURE

HOW INTERESTED ARE YOU IN THE FOLLOWING?
4th Year vs Total Audience – Extremely interested - TOP 3



88%

of 4th years believe they will need future learning after their apprenticeship. (vs. 77% of total audience)



FEMALE APPRENTICES

KEY TAKEAWAYS

Whilst the number of females apprentices is small, their **satisfaction with their role**, and **commitment to the profession** is very clear.

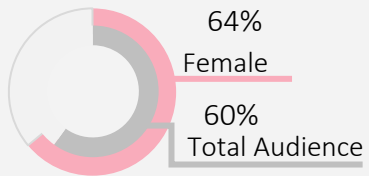
Despite this, they acknowledge that there is ground to make up, finding the **lack of diversity** challenging, and believing that **their gender still makes their apprenticeship journey more difficult**. On top of this, they are also more likely to get a **negative response from friends and family** when entering the industry, highlighting the barriers that still exist for women considering an automotive career.

Positively, this doesn't change their mind – they plan to **stay in the industry long-term**. They will however leave an employer if they don't believe it's the right environment to work and learn in, so take care!

APPRENTICESHIP SATISFACTION

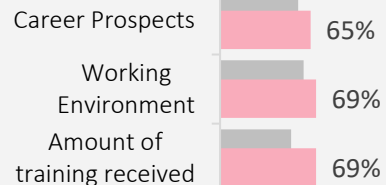
OVERALL APPRENTICESHIP SATISFACTION

Very satisfied (9-10)



MOVERS & SHAKERS

Largest differences satisfaction vs Total Audience

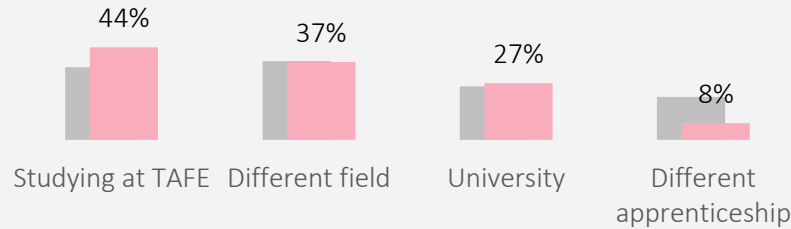


58%

of females strongly believe it is harder for a female apprentice to succeed than a male one. (vs. 17% of total audience)

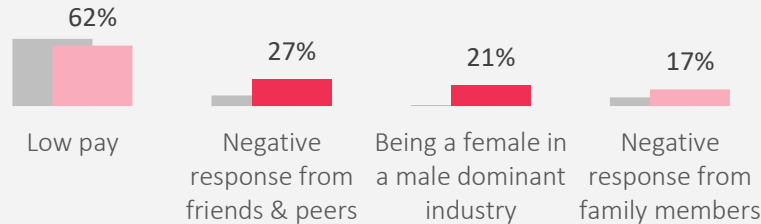
CHOOSING THE AUTO INDUSTRY

ALTERNATIVE CAREER OPTIONS



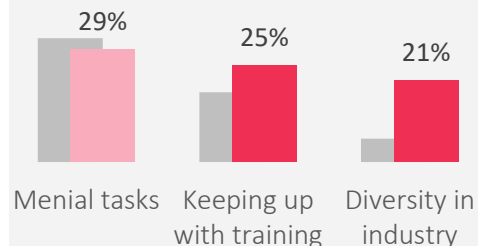
ENTERING THE INDUSTRY

TOP 4 MOST COMMON CHALLENGES WHEN STARTING OUT



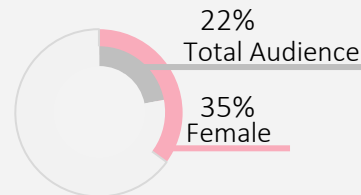
ONGOING EXPERIENCE

TOP 3 CHALLENGES DURING APPRENTICESHIP



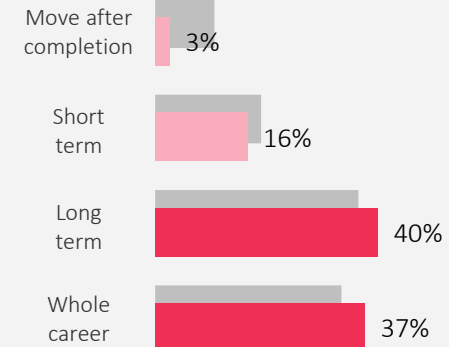
APPRENTICES FACE HOSTILE WORK ENVIRONMENTS

Strongly agree (9-10)



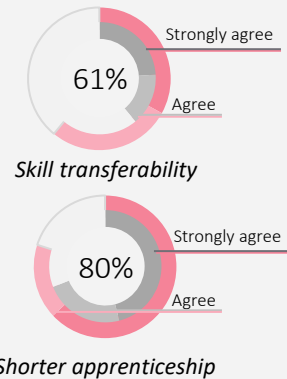
CONSIDERING LEAVING

INTENDED LENGTH IN THE AUTO INDUSTRY



APPRENTICESHIP PERCEPTION

Strongly agree (9-10) & agree (6-8)

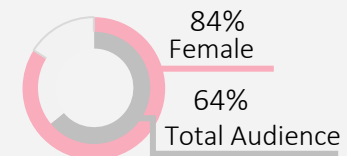


CONSIDERED OR TAKE ACTIONS DURING APPRENTICESHIP

Females vs Total Audience



LOOKING TO THE FUTURE



IMPORTANCE OF ADOPTING TECHNOLOGICAL CHANGES

Strongly agree (9-10)

CAREER CHANGER

KEY TAKEAWAYS

Career changers stand out from the crowd due to their interest in the technological side of the automotive industry. They appear to be forward thinkers with a desire to learn about these **new technologies** and how they will impact the industry.

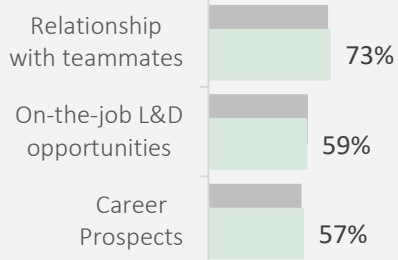
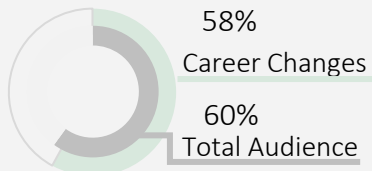
This does mean they are less engaged with some aspects of the apprenticeship, leading to a desire for greater **flexibility** over the **length** (and potentially also training content) **of their apprenticeship**,

Given they are potentially more likely to be taking a step backwards to move into the sector, they are likely to be more heavily challenged by the **lower pay rates**, and are also more likely to receive a negative response from family members in response to their decision to enter the industry.

APPRENTICESHIP SATISFACTION

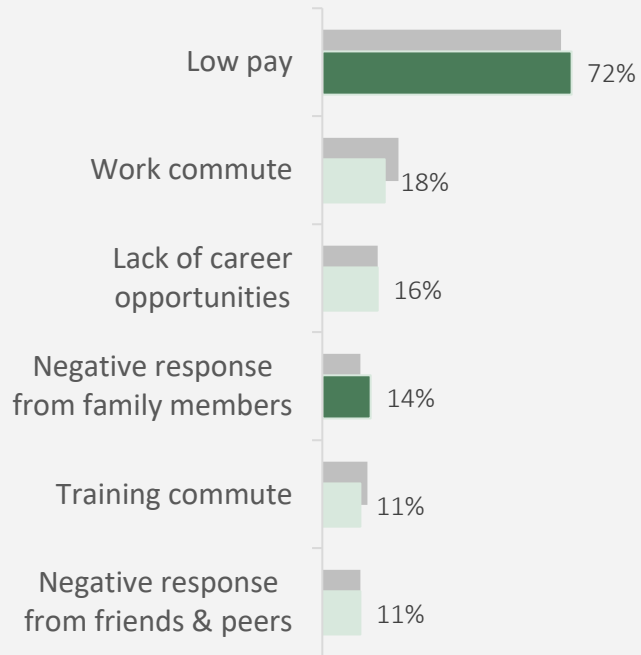
OVERALL APPRENTICESHIP SATISFACTION
Very satisfied (9-10)

SATISFACTION DRIVERS
Highest satisfaction



ENTERING THE INDUSTRY

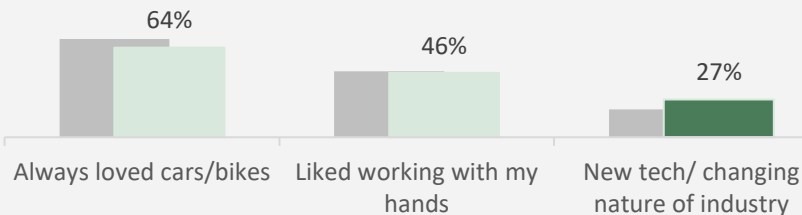
CHALLENGES WHEN STARTING



CHOOSING THE AUTO SECTOR

WHAT ATTRACTED YOU TO THIS PATHWAY

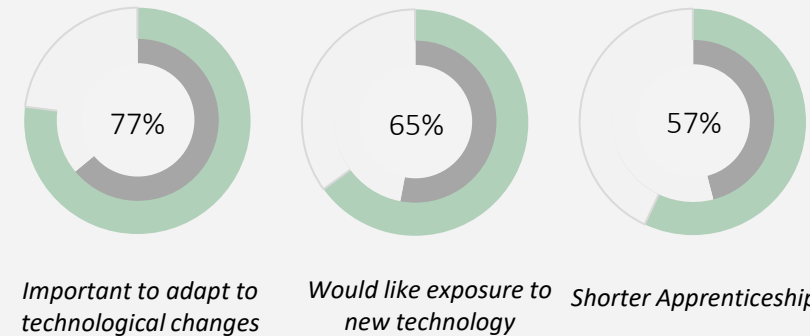
TOP 3



LOOKING TO THE FUTURE

APPRENTICESHIP PERCEPTION

Strongly agree (9-10)



HOW INTERESTED ARE YOU IN THE FOLLOWING?

Career Changer vs Total Audience – Extremely interested– TOP 3



67% vs 67%
Master tradesman

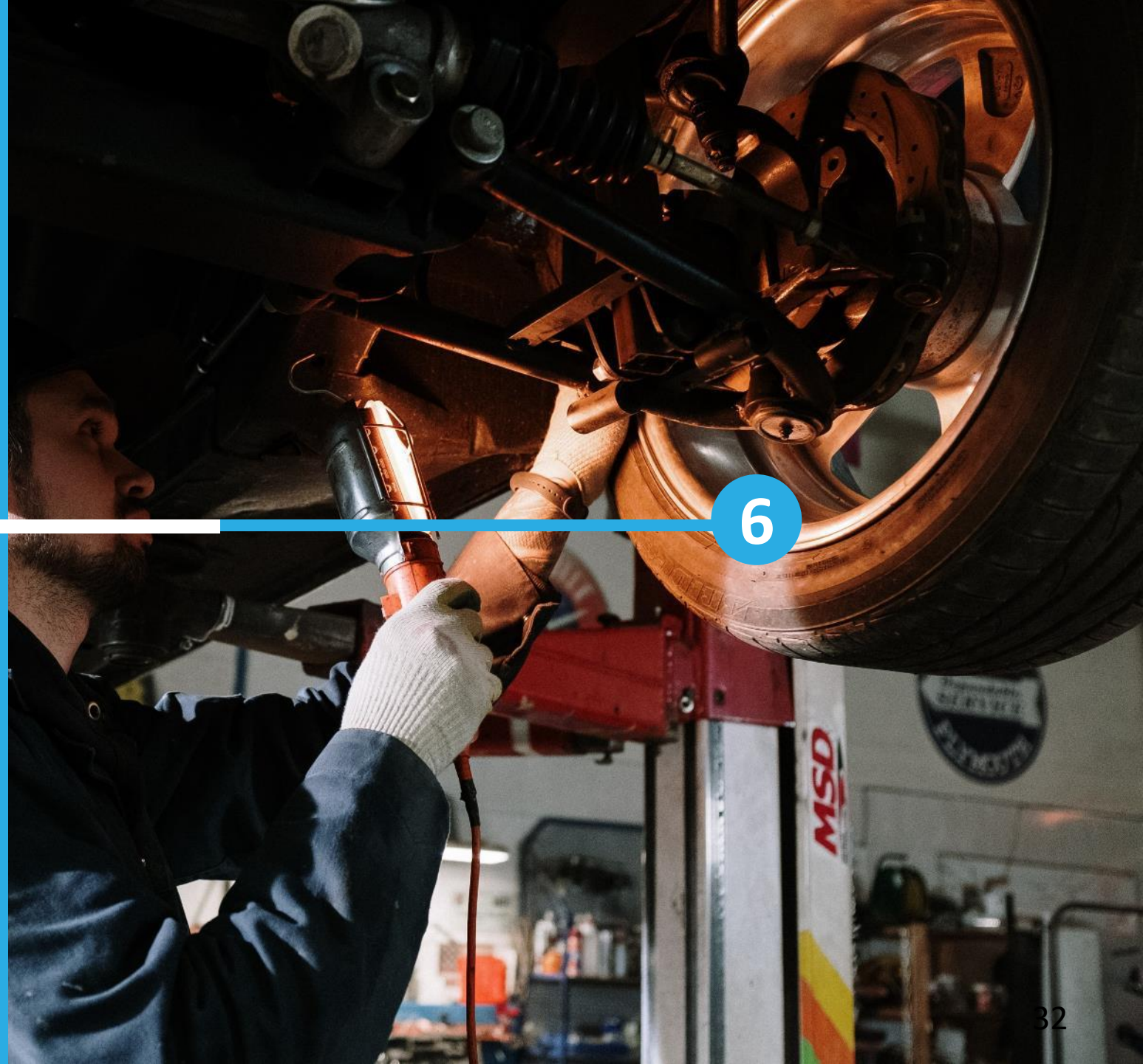


56% vs 49%
Becoming a specialist
(e.g. Electric Vehicle Technician)



52% vs 41%
Advanced vehicle technology
(e.g. adv driver assistance systems, electric/hybrid vehicles)

METHODOLOGY



6

METHODOLOGY

- 15-minute online survey, which was distributed by AAAA, AADA and MTAQ (and selected partners), through social media and distribution lists.
- Participants were incentivised for participation with the opportunity to win one of a range of prizes (e.g. tool kits, drive days, etc.)

TIMING

- The survey was in field between the 28th of February and 29th of March 2022

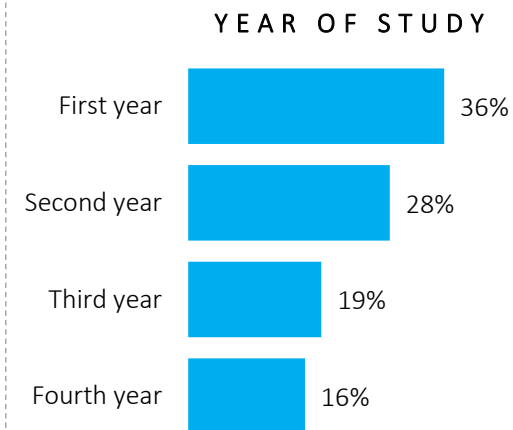
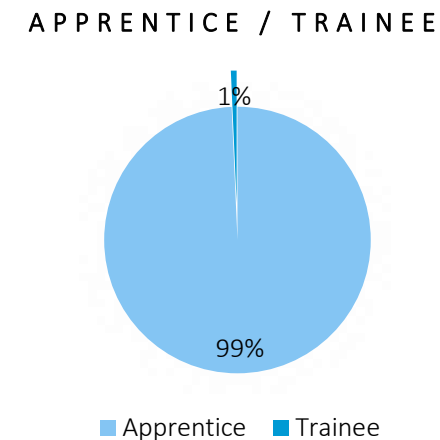
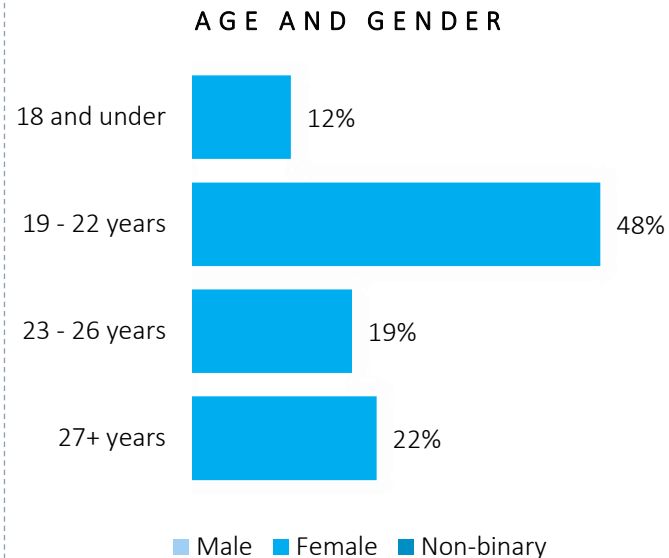
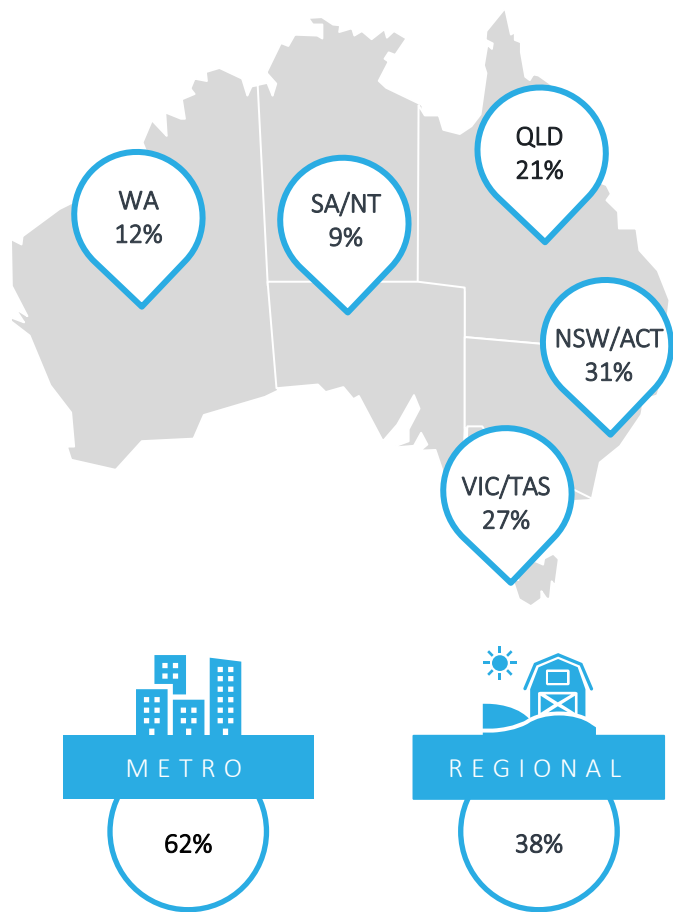
SAMPLE

- n=619 automotive apprentices
- Note: n=8 incompletes were included in the sample. They had completed all questions except the final open enders used to select the prize winners
- Participants could be at any stage in their apprenticeship, with the sample weighted by State to be representative of the Automotive Training Sector



RESPONDENT PROFILE | WEIGHTED DATA

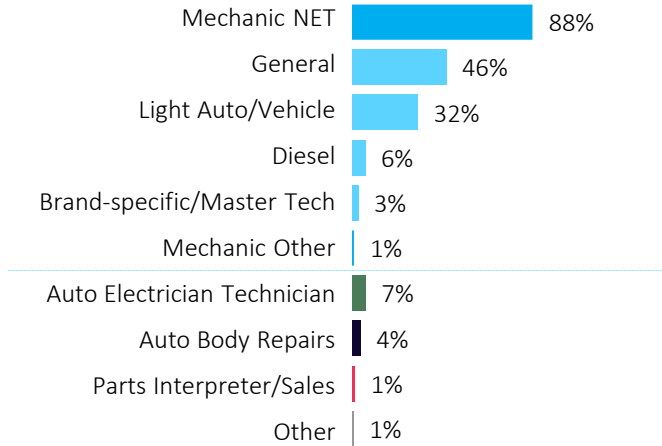
Our weighted sample is well distributed in terms of location and year of study; it also includes enough women to facilitate analysis into their apprenticeship experiences



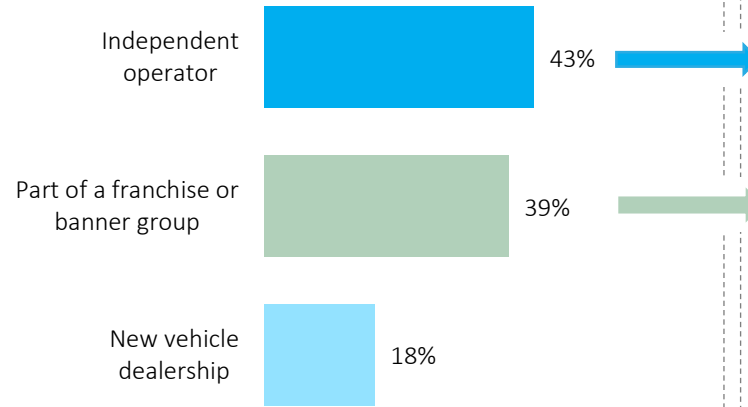
RESPONDENT PROFILE | WEIGHTED DATA

Our sample also includes a diverse mix in terms of the apprenticeship environment

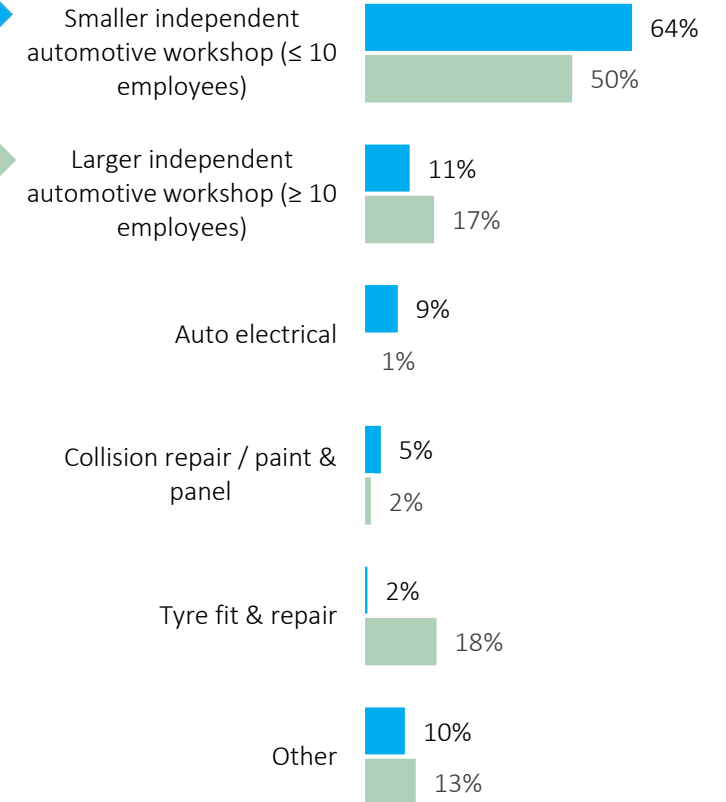
WHAT ARE YOU TRAINING TO BECOME?



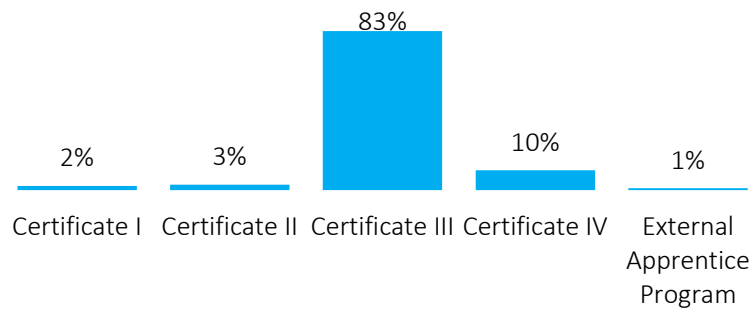
PLACE OF WORK



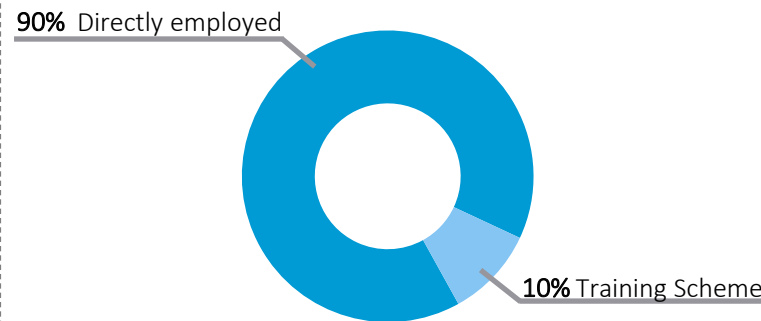
TYPES OF INDEPENDENT/FRANCHISE WORKSHOPS



QUALIFICATION ENROLLED IN



FORM OF EMPLOYMENT



This gives us confidence that we have captured a broad cross-section of the apprentice community



Brian Savage
Chief Operating Officer



Ben Selwyn
Director



Kathy Winkcup
CFO & GM Investment Portfolio



Lesley Yates
Director of Government
Relations and Advocacy

