

2016 Benchmark Survey



Ken Benson
Subaru of America



Technical Training OE Benchmark Survey Summary

**ATMC Annual Conference
Westin Denver Airport
Denver, Colorado
April 6, 2017**

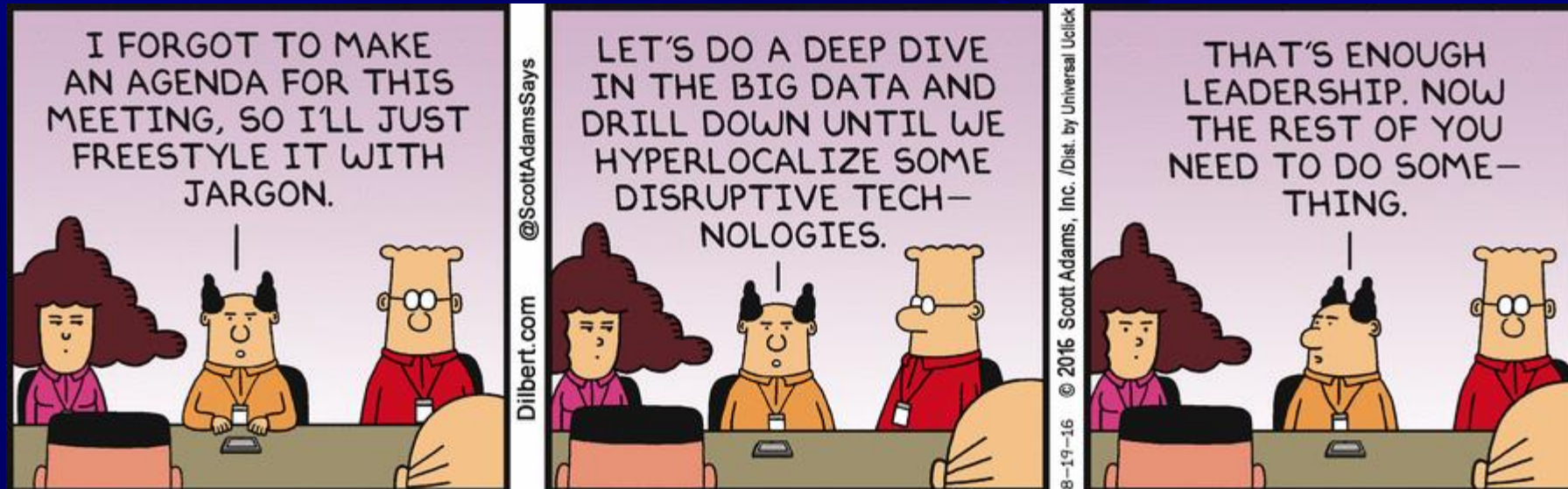
Surveys...

★ An executive summary...



Agenda

1. Executive Summary
2. Observations and trends



A Few Quick Numbers...

- ✱ – 173,582 [167,917]

- ✱ Technicians

- ✱ 538 – [526]

- ✱ Classrooms

- ✱ 1,879 – [1,978]

- ✱ Training Stalls

Survey Form

As of December 31, 2016
Technicians (excludes 'express' Technicians)
Franchised Dealers
Percent of Annual Technician Turnover
Instructor-Led "Core" Courses
Instructor-Led Training Days In Curriculum
Hours Of Available E-learning
Online E-Learning Content Available 24/7, Anywhere - Y/N
Publish A Technician Magazine - Y/N
Dealer Skill/Competency Requirement - Y/N
Percent "Trained" Or "Certified" Technicians
Percent Of "Master & Above" Technicians
Is ASE Certification Required For Training Certification - Y/N
Is ASE Certification Required For Training Recognition - Y/N
Do you have a Technician Recognition Program(s) - Y/N
Do you have a Technician Competition Program(s) - Y/N
Is your Technical Training Organization Centralized Or Decentralized - D/C
Curriculum Designers/Developers On OE Staff
Do you have a Warranty—Training Link? - Y/N
Is Collision Repair Training Offered - Y/N
How is Collision Repair Training Delivered - H/E-L/Both
Training Centers
Training Classroom - Length In Feet
Training Classroom - Width In Feet
"Training Stall" - Length In Feet
"Training Stall" - Width In Feet
Percent Classes In Training Centers
Satellite Training Centers
Do You Use Mobile Training Locations? - Y/N
Full-Time Instructors
Full-Time Contract Training Instructors
Target Class Size Per Instructor
Average Class Size Achieved
Number of Hours In A Training-Day?
Training-Day Target Per Instructor Per Month
Actual Training-Days Delivered Per Instructor Per Month
Classrooms
Training Stalls
Student To Training Vehicle Ratio
Carlines Supported
% Maintenance vs. Repair Mix
Units In Operation (7-year)
Total technicians this year - participating in any event: E-L or H-L
% of technicians this year - H-L event
% of technicians this year - E-L event
Total H-L learning hours delivered – fixed training centers
Total H-L learning hours delivered – satellite training centers
Total E-L learning hours delivered
of technician certification "levels"?
What is the average in-brand technician tenure, in years?
Are training vehicles used to compliment and deliver instructor-led training? Y/N
Total number of discrete training vehicles in training vehicle "fleet"?
of Field Service Engineers/Field Technical Specialists
of Full-Time Contract Field Service Engineers/Field Technical Specialists
Does your company have an "Express Service" Program? - Y/N
"Express Service" Technicians (express only)
Percent Annual "Express Service" Technician Turnover
Is Non-Technical Soft Skills Training for Technicians Used As Certification Requirement? - Y/N
How many unique post-secondary Technician Career Entry locations supported?
Do you support the AYES Technician Career Entry program? - Y/N
How many unique secondary Technician Career Entry locations supported?
Is ASE Certification used as a performance metric for post secondary school performance? - Y/N
of trained technicians that graduate from post-secondary Career Entry Program(s) annually
of trained technicians that graduate from secondary Career Entry Program(s) annually (i.e., AYES)
Average in-brand placement rate for your post-secondary Technician Career Entry Program Graduates
Do you offer training materials and/or instruction in languages other than English? Y/N
What other languages?

Survey Returns

- ✱ 83% return rate!
 - ✱ 19 of 23 OE's returned
 - ✱ Four didn't participate
- ✱ 66 questions; several new
 - ✱ Over 1,250 potential "data points"



So Let's Dive Right In...

✱ But first...



Ground Troops

- ✱ 173,582 technicians – [167,917]
- ✱ 326 full-time instructors – [300]
- ✱ 185 contract instructors – [163]
- ✱ 511 combined instructors – [463]
- ✱ 702 full-time FTSs~FSEs – [567]
- ✱ 38 contract FTSs~FSEs – [80]
- ✱ 740 combined FTSs~FSEs – [647]

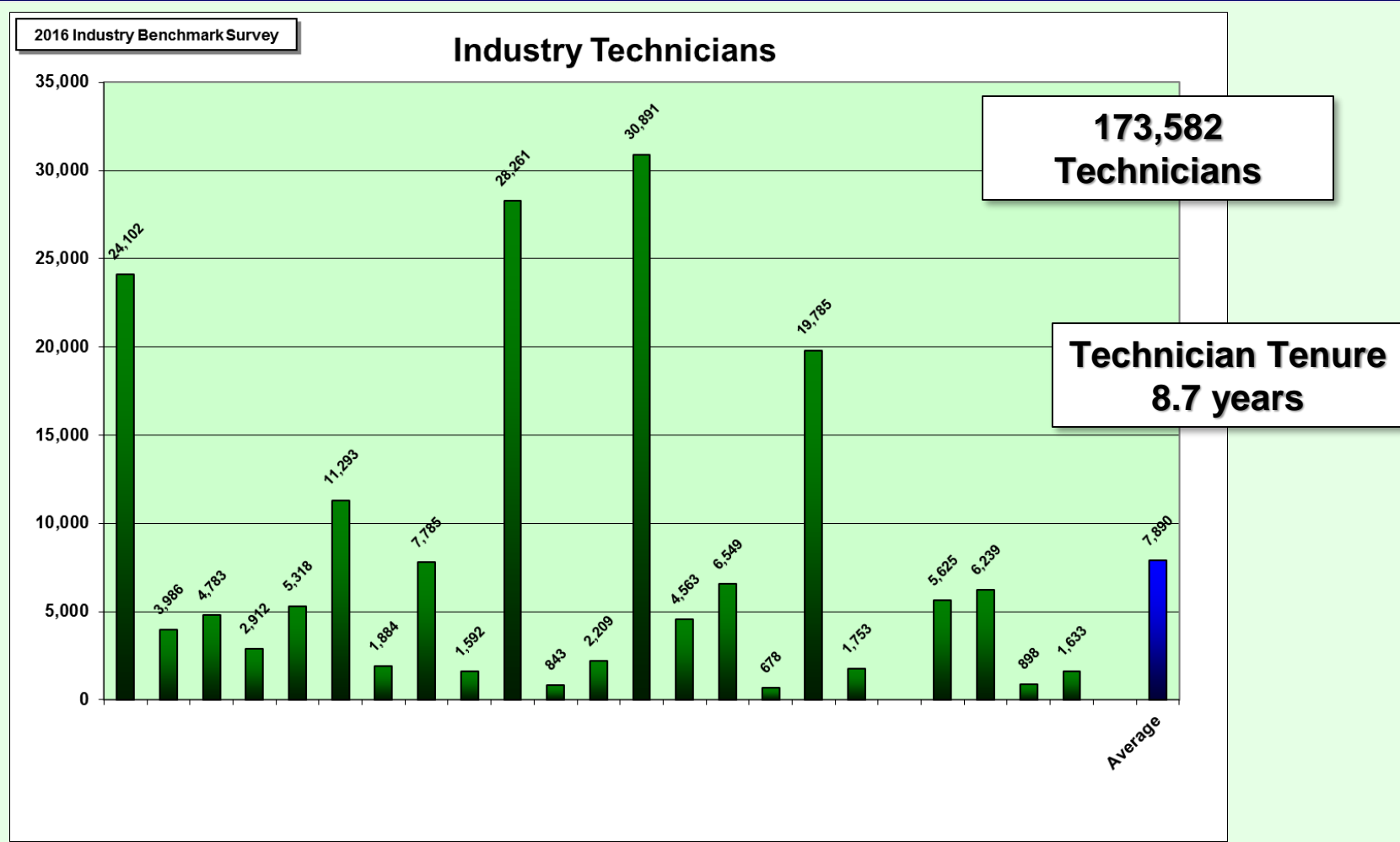
Brick & Mortar

- ✱ 204 fixed training centers – [214]
- ✱ 125 satellite training centers – [126]
- ✱ 1,879 training stalls – [1,978]
- ✱ 3.49 stalls per classroom – [4.08]
- ✱ 1,255,065 sq. ft. total training space – [1,256,487]

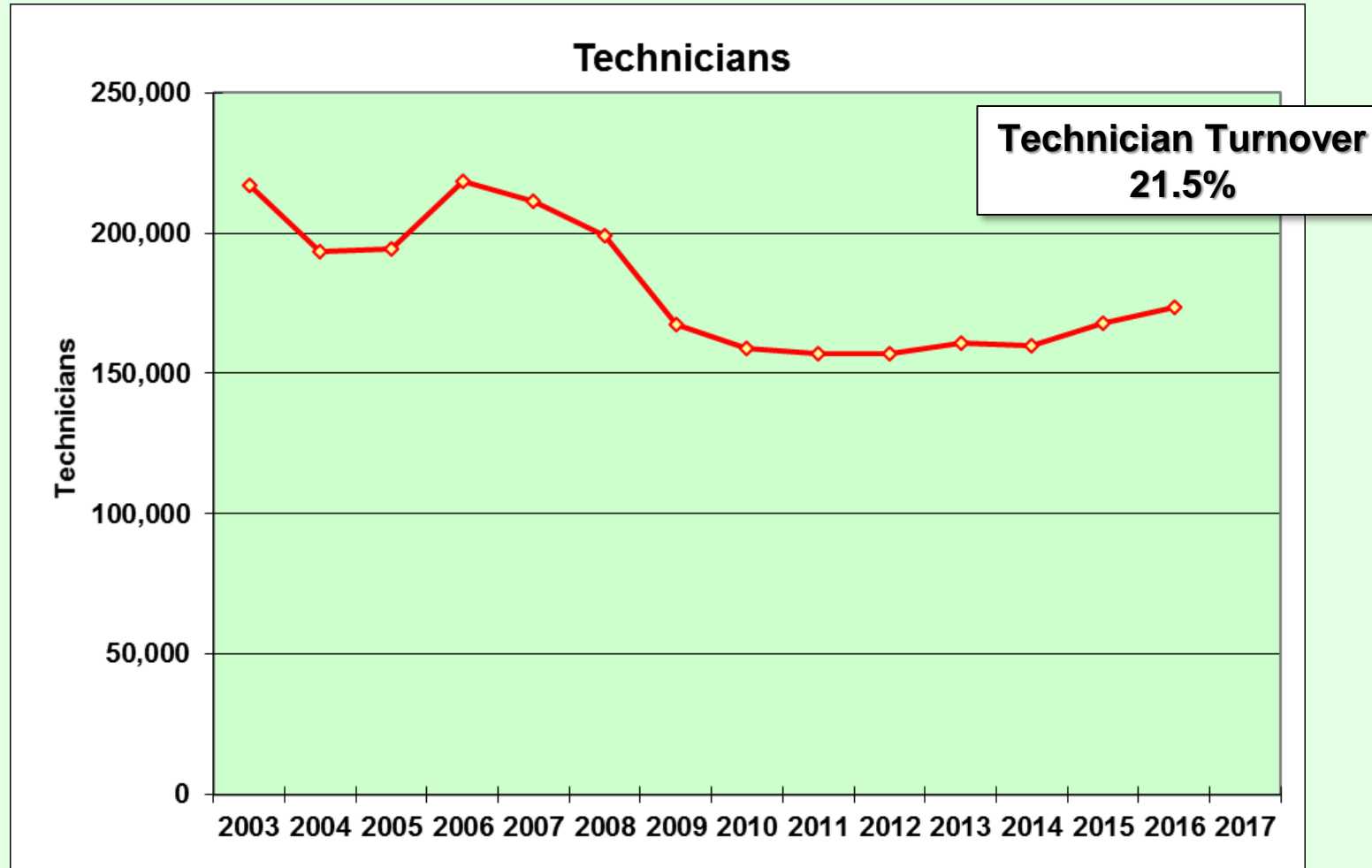
Tech Ratios

- ✱ 564 UIO/Tech – [522]
- ✱ 8,265 Techs/OE – [7,996]
- ✱ 851 Techs/training center – [785]
- ✱ 340 Techs/instructor _(all) – [363]
- ✱ 323 Techs/classroom – [319]

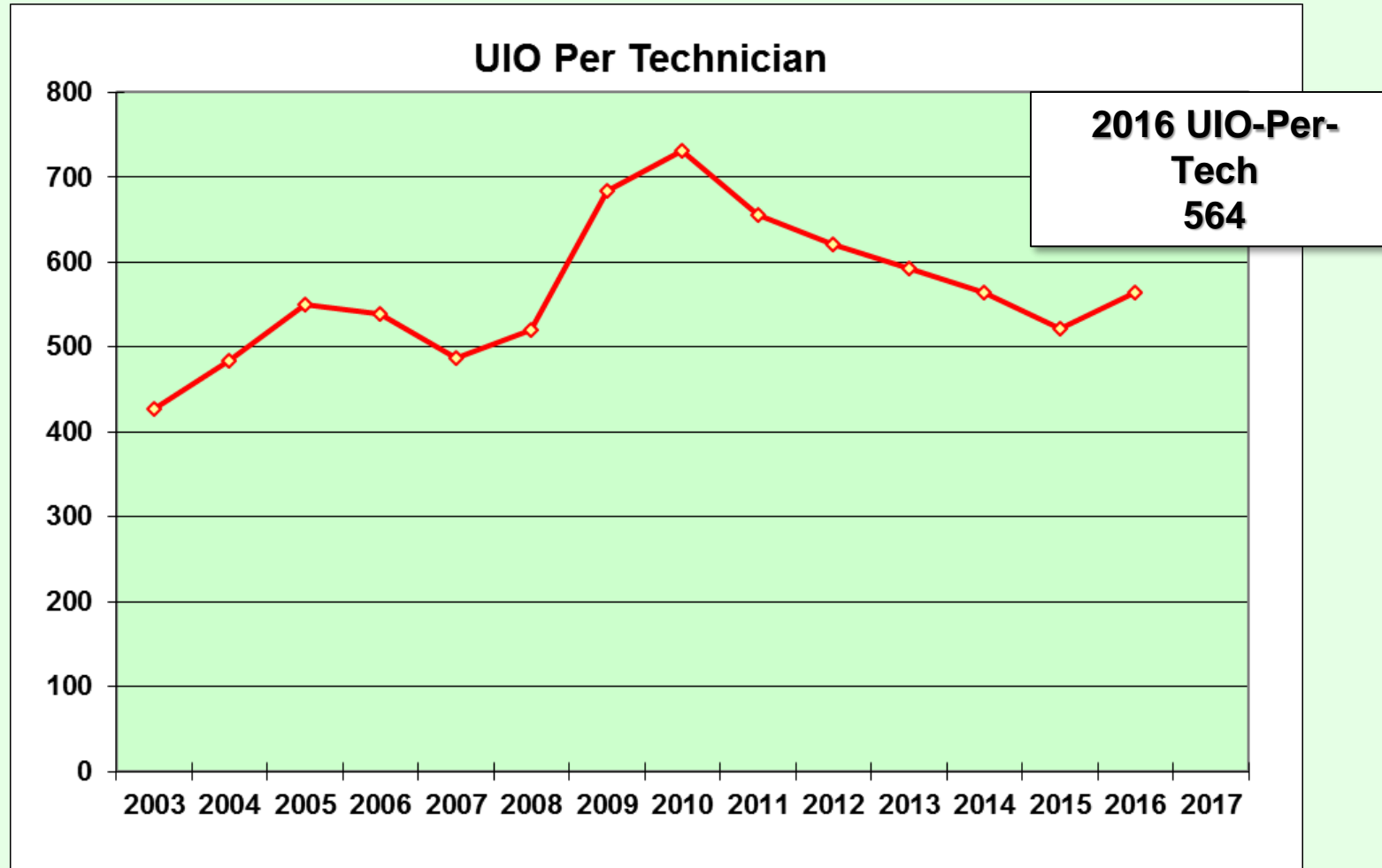
Industry OE Technicians



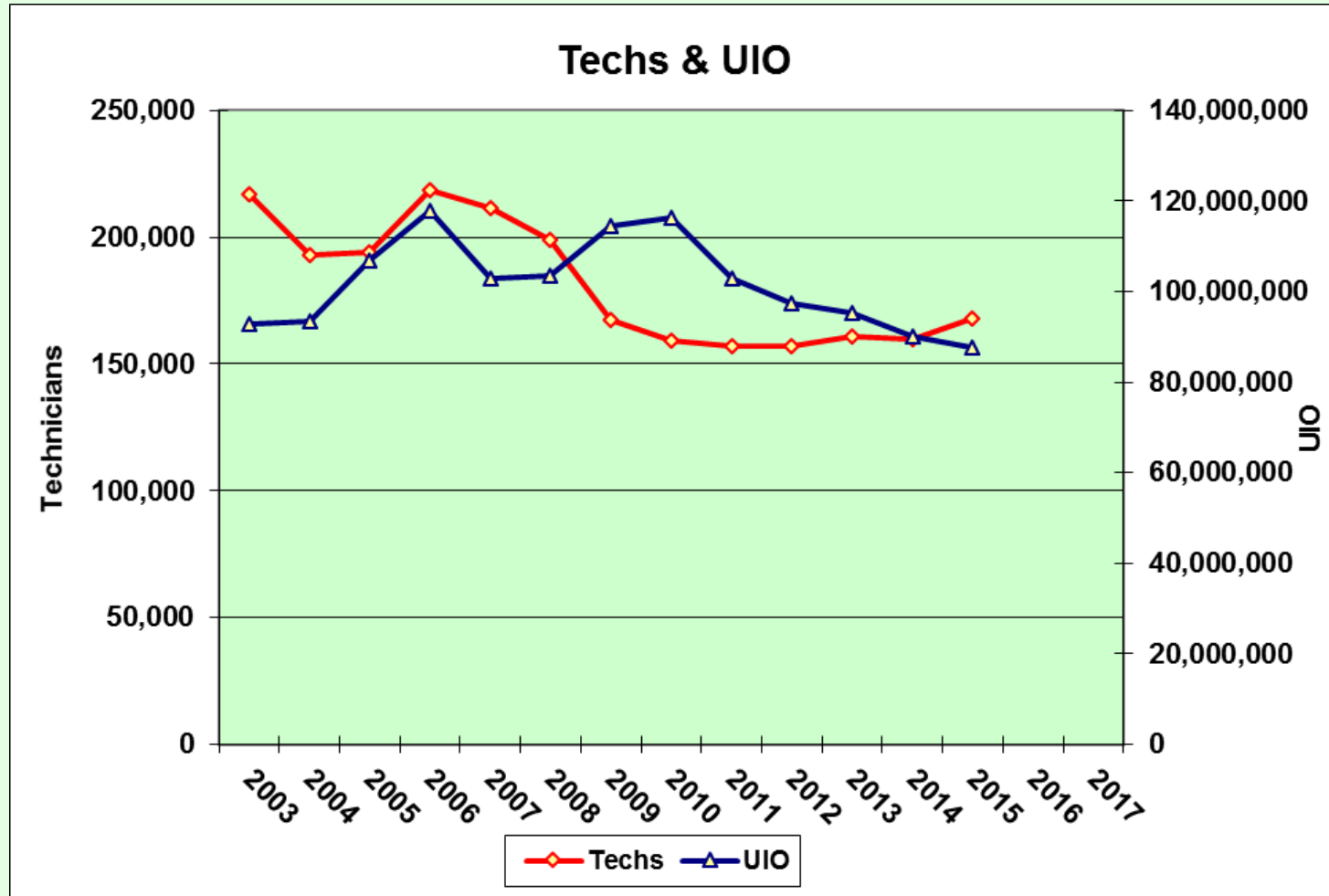
Technicians-By-Year



UIO-Per-Technician

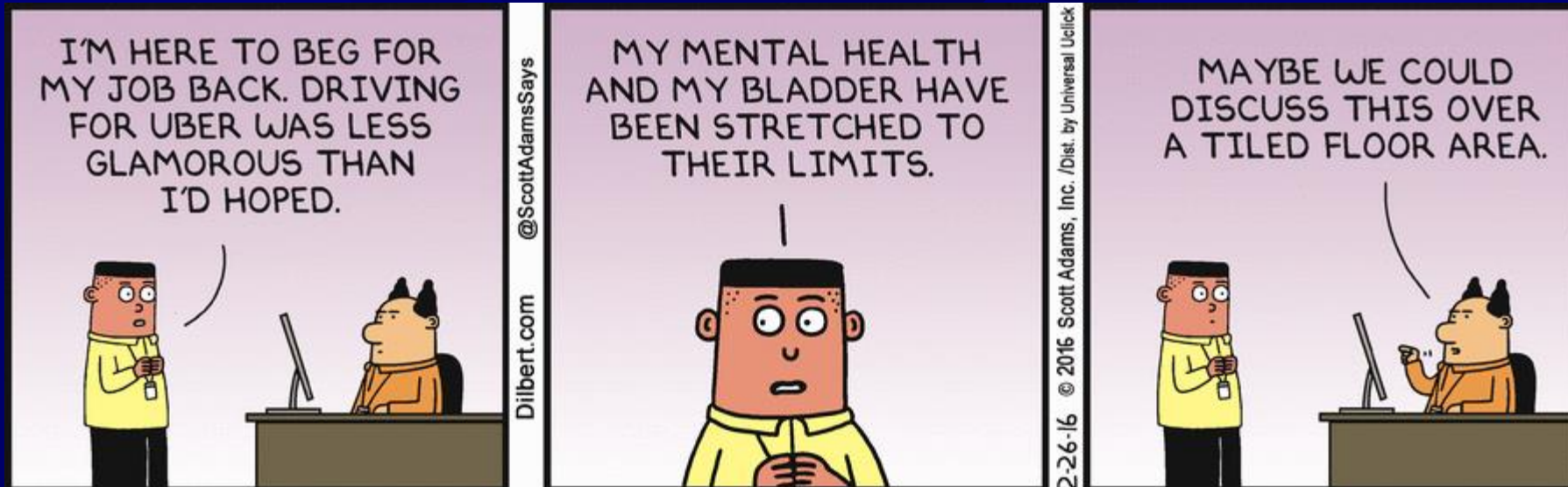


UIO & Technicians

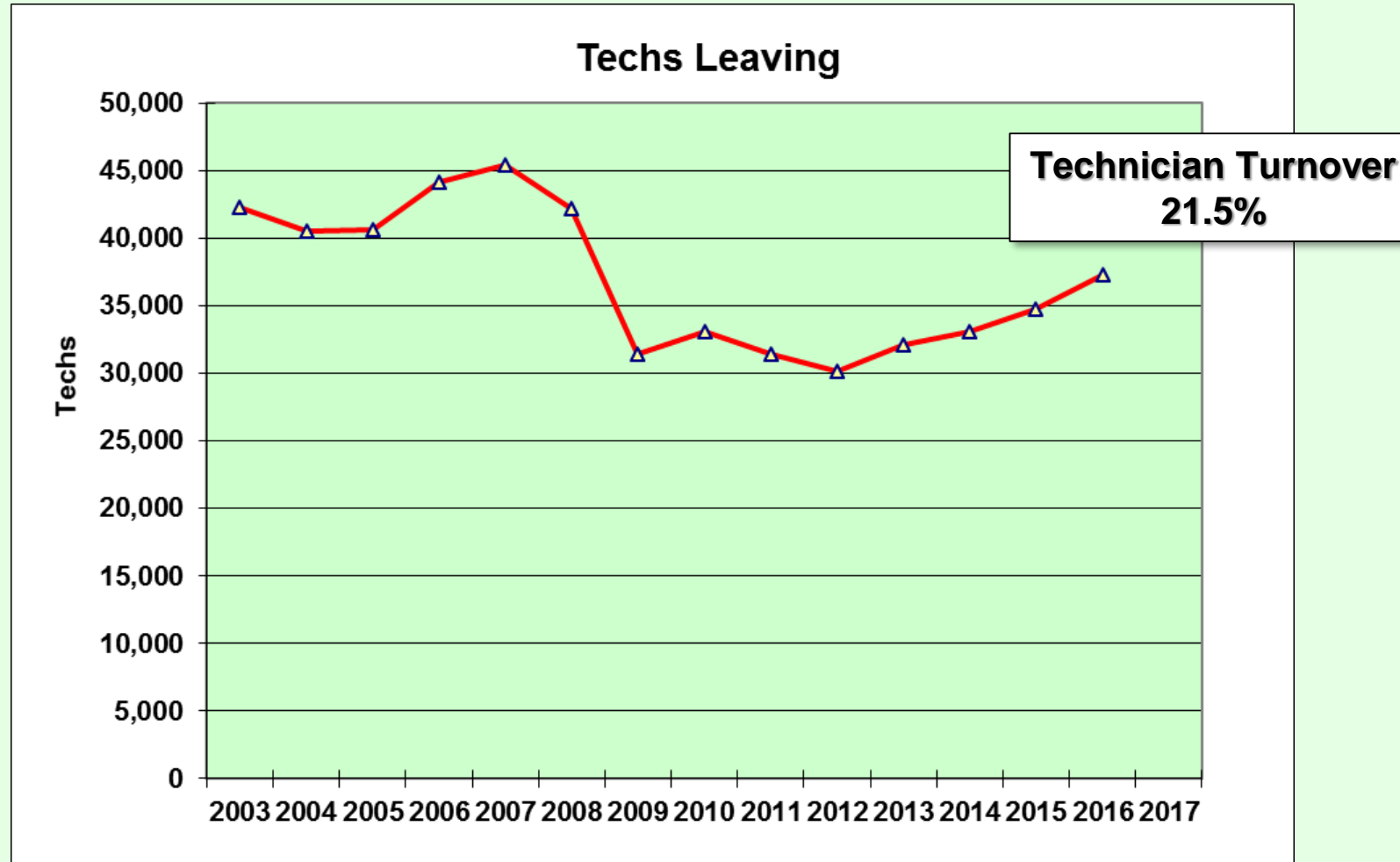


Turnover

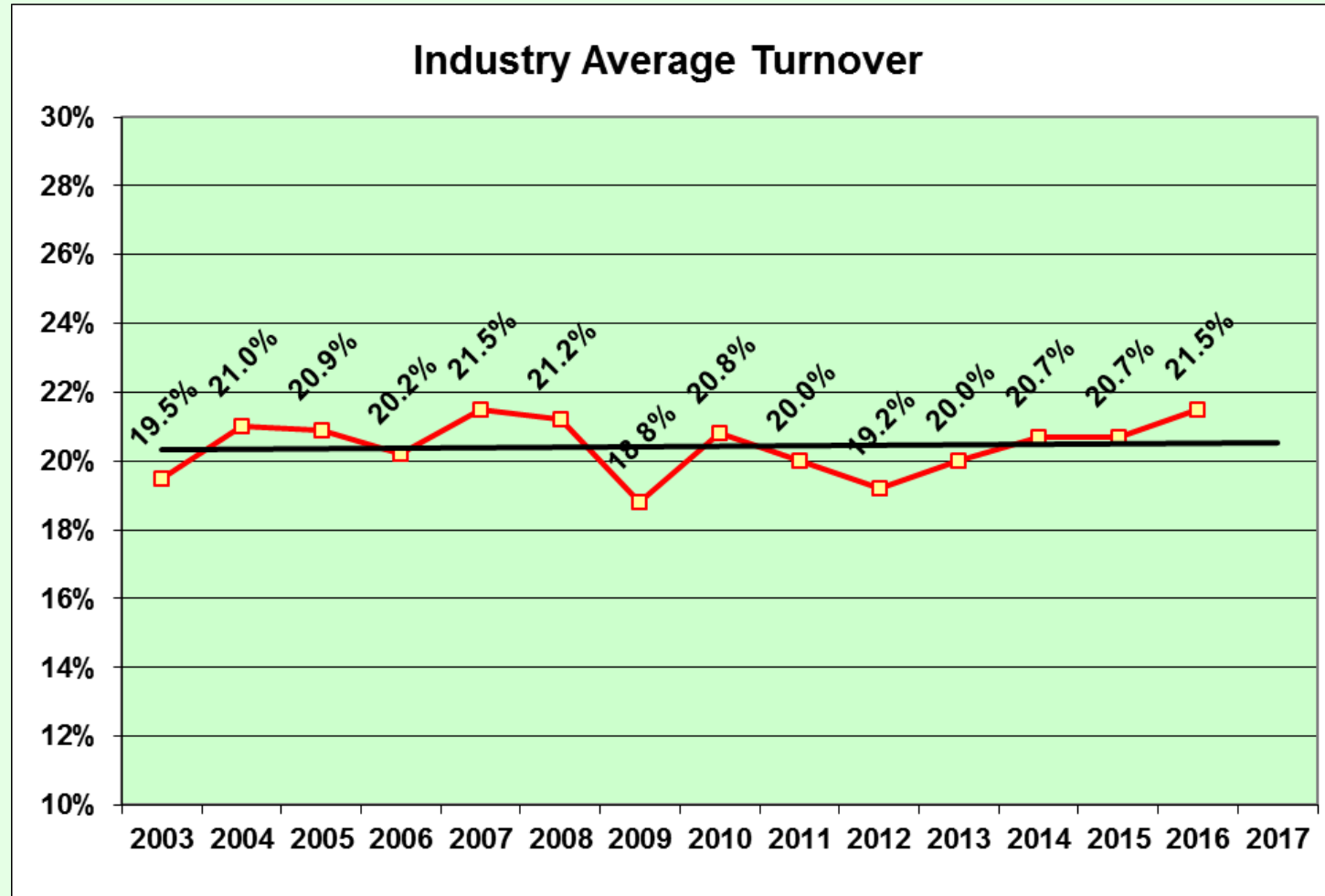
★ ...Technician, Uber driver, or aspiring drywaller?



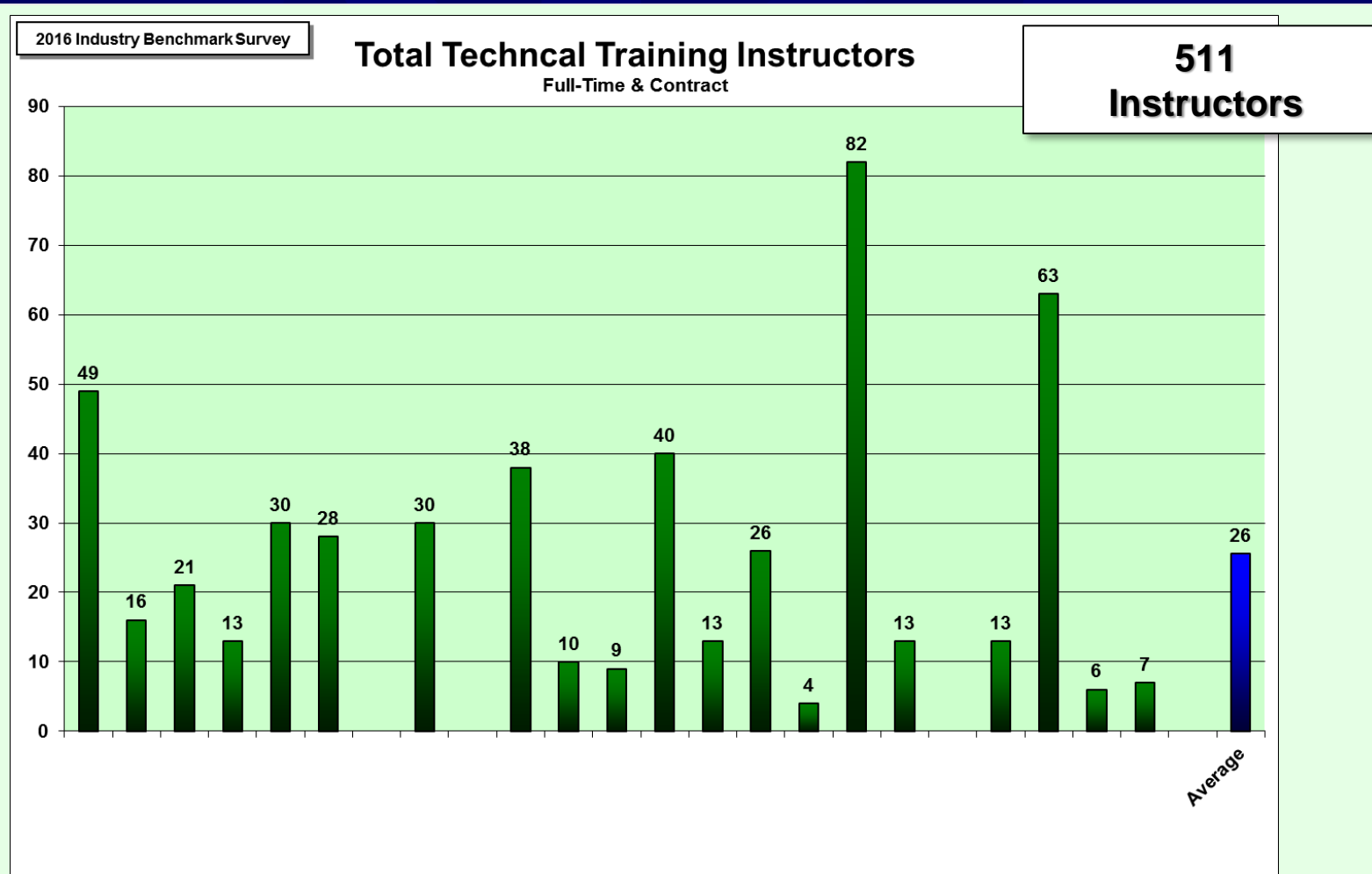
Brand Migration – Industry



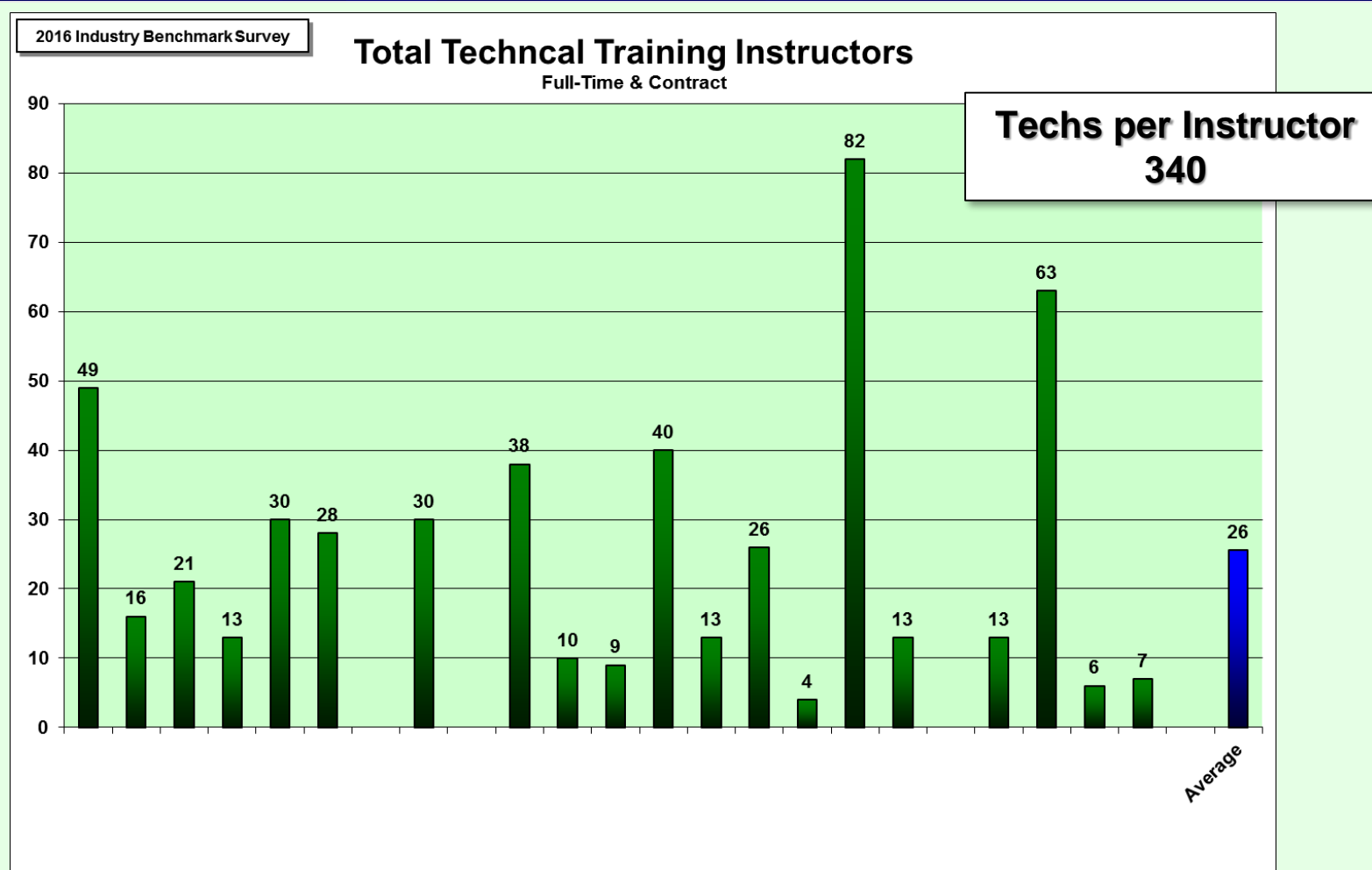
Technician Turnover



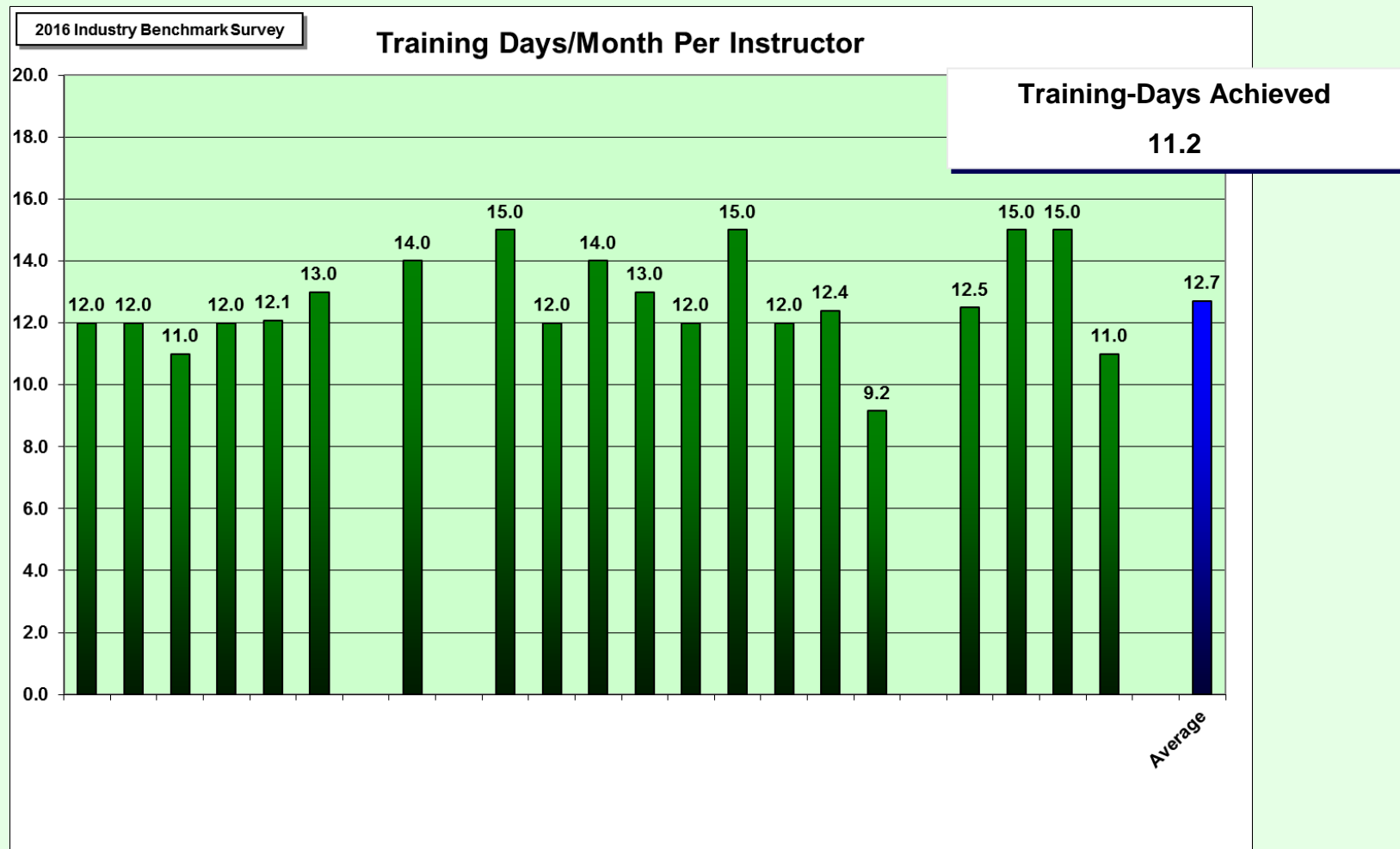
Industry OE Instructors



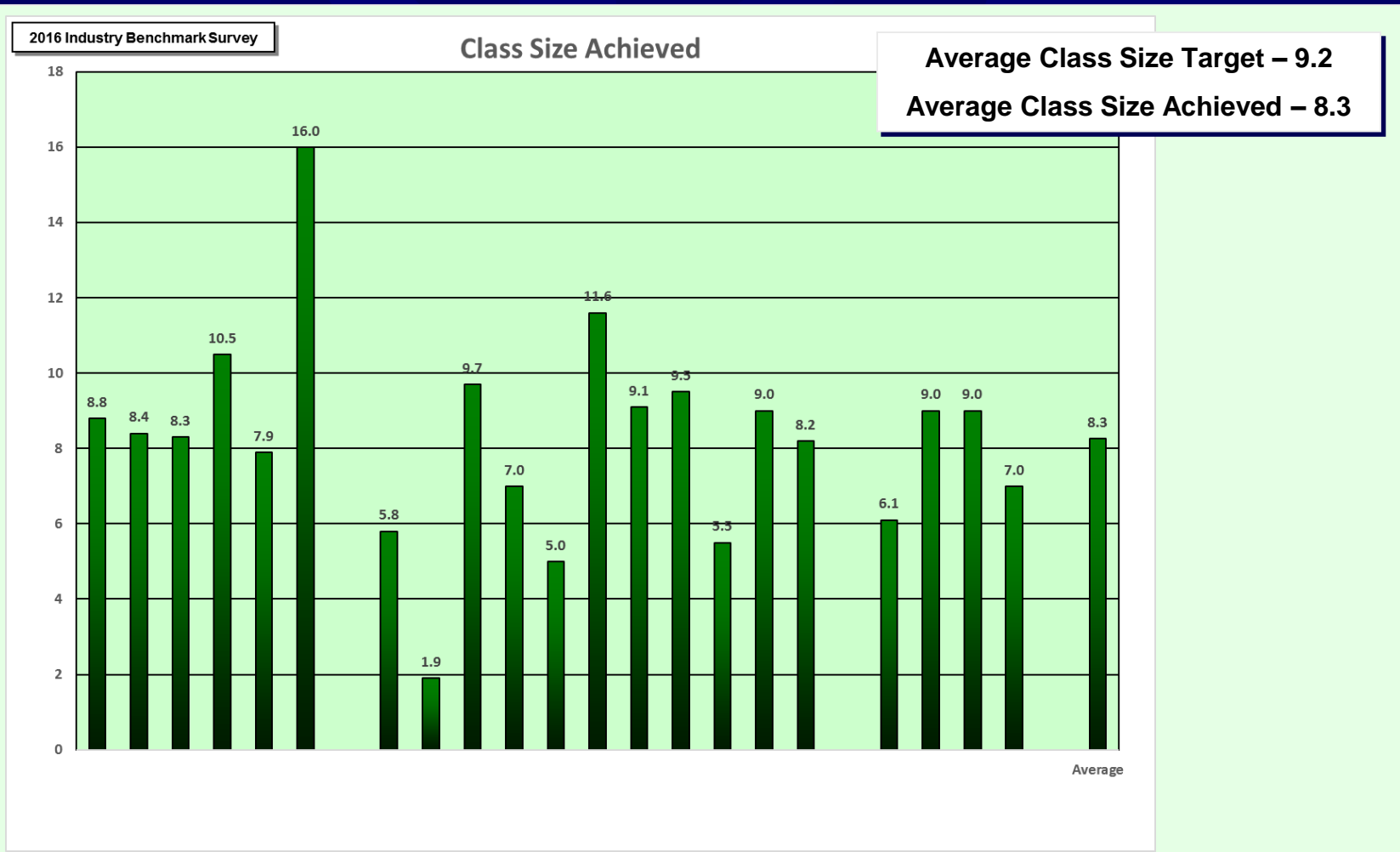
Technicians-Per-Instructor



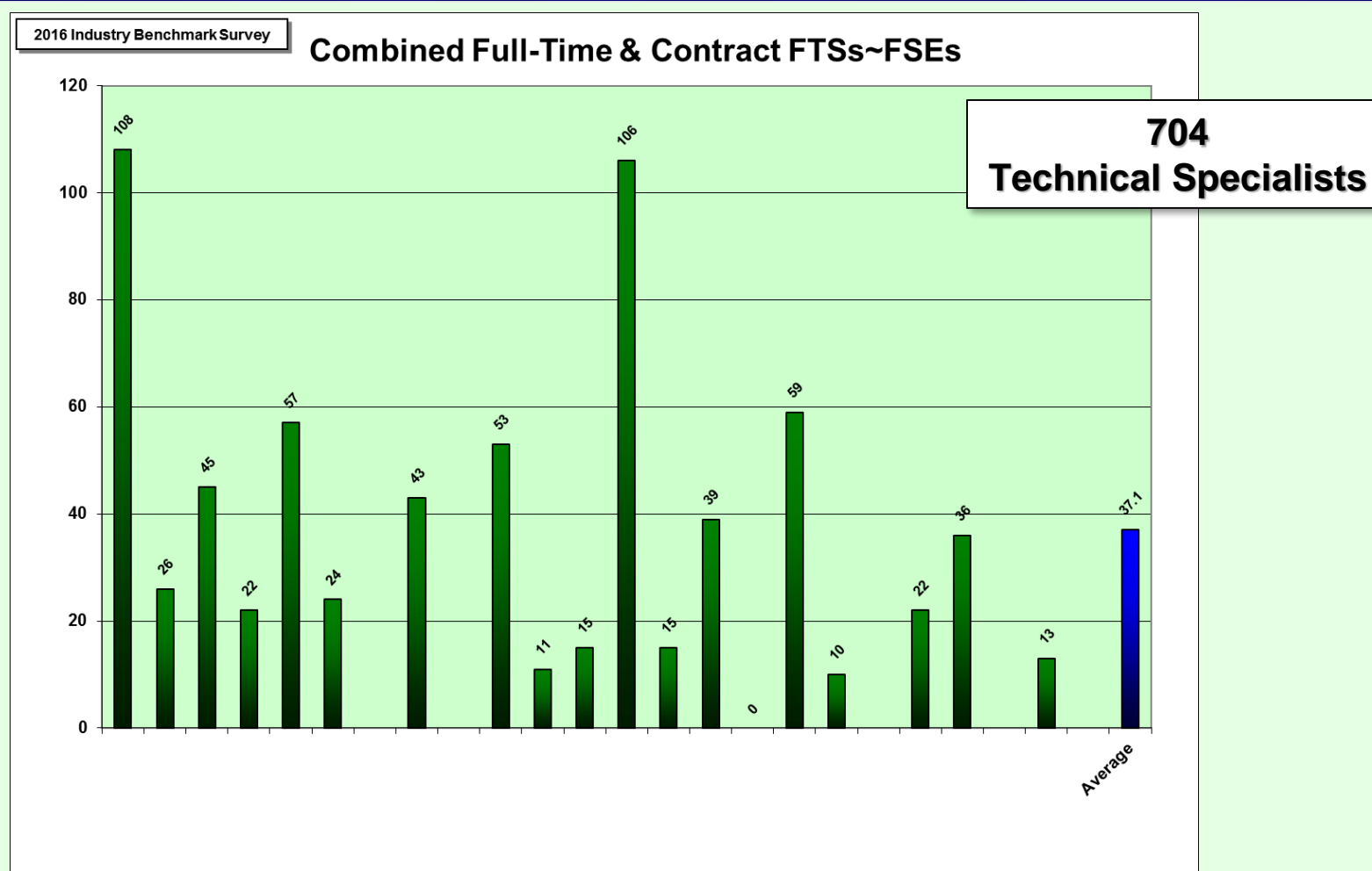
Training-Day Target/Trainer



Avg. Class Size Achieved



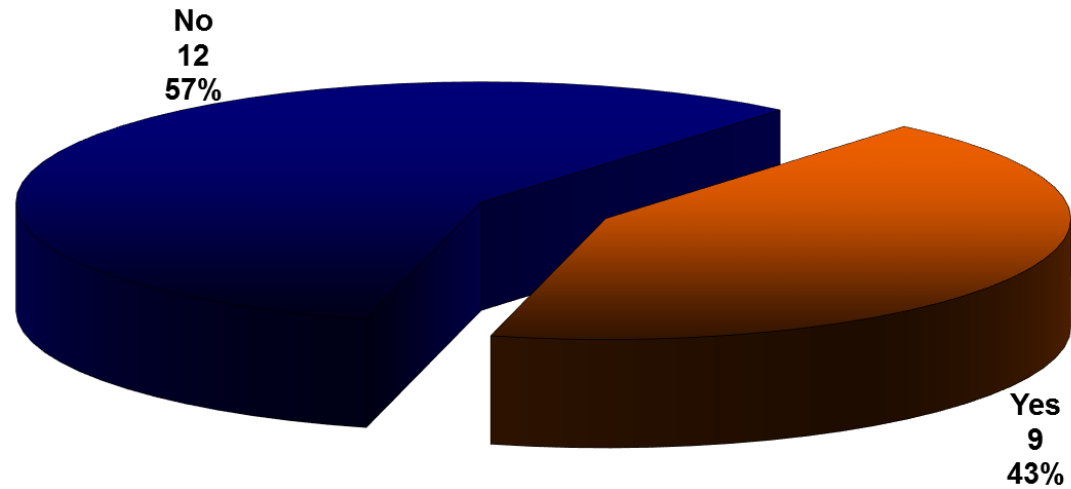
Field Technical Specialists



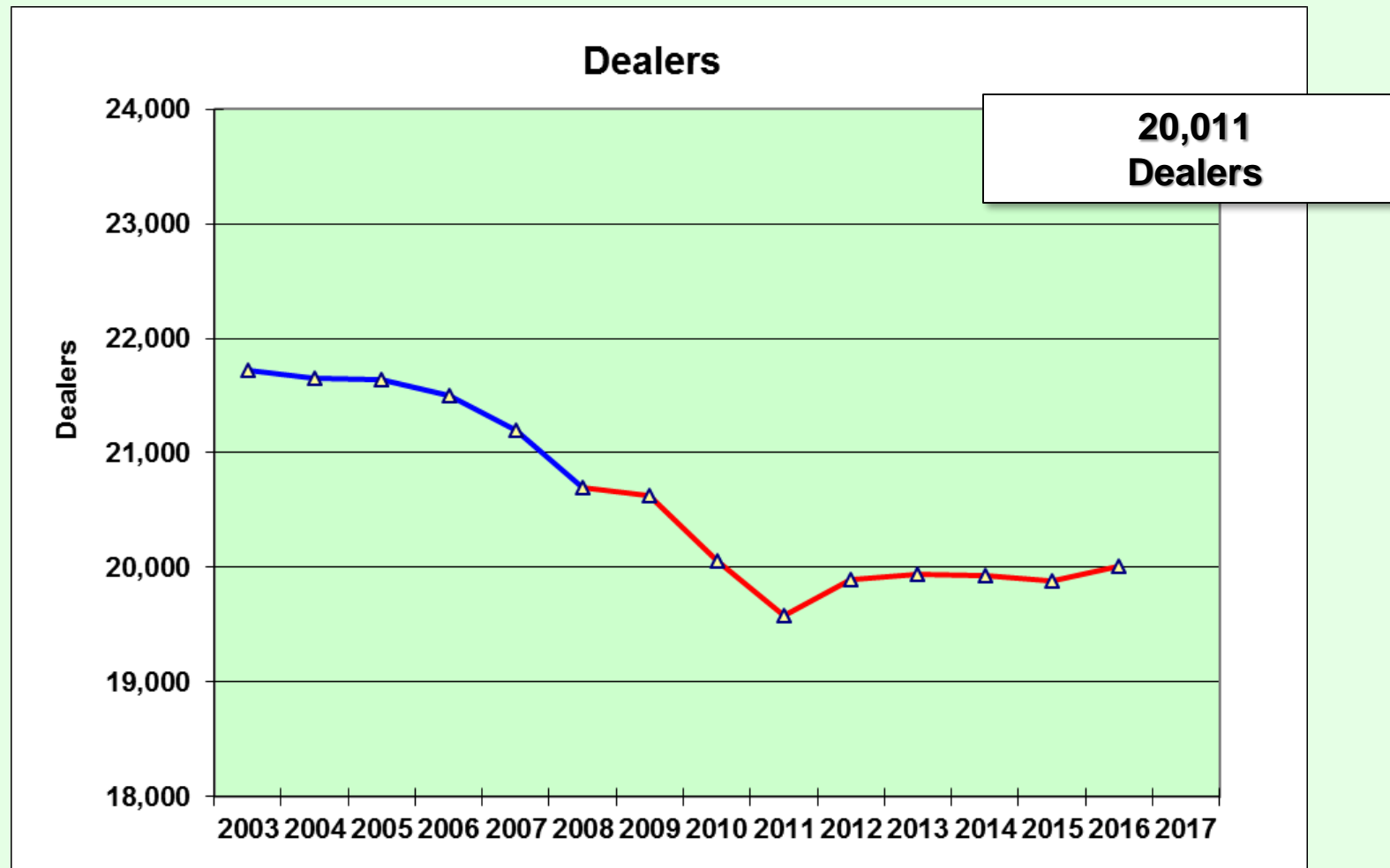
Industry – ASE Requirement

2016 Industry Benchmark Survey

ASE Certification Requirement



Dealer Trend



Questions/Observations ...bored yet?



Your Closing Thoughts

- ✱ Audience take-aways?...
- ✱ Impact on your organization?
- ✱ New survey questions?
- ✱ What can we do to make this more informative?

Thank You...Again!

- ★ Observations?
- ★ Impressions?
- ★ Questions?
- ★ Suggestions?
- ★ Comments?



THANK
You!

2016 Benchmark Survey

Thank You

