

SW REGION SECTOR SUMMARY

AUTOMOTIVE SKILLS

SECTOR FOOTPRINT

Automotive Skills is the Sector Skills Council for the Retail Motor Industries. The sector includes new vehicle sales; used vehicle sales; routine maintenance & repair; MOT inspections; accident/body repair; restoration/rebuilding; fast fit (tyres, exhausts, batteries, etc.); post-factory fitting and adaptation (electricals, Motability, etc.); parts and accessories sales; roadside rescue/recovery; contract hire/operational leasing; 'daily' rental (self drive or with driver) and valeting/preparation. (www.automotiveskills.org.uk)

AUTOMOTIVE SKILLS LABOUR MARKET

Source: SW SLIM balance sheet June 2008; Automotive Skills; and NESS 2007 data derived from LSC SW research team.

Sector size & business unit size

- The sector has a workforce size of just over 57,000 45% of whom are directly involved in the sale of vehicles and further third are working in maintenance and repair.
- The sector accounts for 2.3% of the total workforce in the SW.
- 16% of the working age workforce is self-employed.
- Data for 2005 suggests automotive skills had approximately 8,370 business units in the SW.
- 88% of firms employ less than 10 employees, with only 2% having 50+ employees.

Profile of the workforce

- It is estimated that 99% of the Automotive Skills workforce in the SW is white.
- The sector workforce is predominantly male with a greater proportion of the employed in the sector who are male (77%) than the SW average (53%).
- 31% of the workforce is aged over 50 years, a proportion in line with the average for the SW as a whole.
- There was an 11% change between 1998 and 2003 in this sector of employment in the SW. Forecasts of employment growth suggest that from 2004 to 2014 there will be a loss of 1,000 jobs due to a contraction of the sectors employment, although an additional 20,000 jobs will need to be filled due to replacement demand (created by people leaving that sector of employment or retiring).

Vacancies & recruitment

- Employing establishments within Automotive Skills in the SW reported 1,750 vacancies in 2007, accounting for 3% of the total number of vacancies in the region.
- Of those vacancies 34% were hard-to-fill, in line with overall average for the SW.
- In 2007 there were just under 500 vacancies that were as a result of skills shortage accounting for 28% of all vacancies. Skills shortage vacancies also account for 81% of all hard-to-fill vacancies higher than the SW average of 62% suggesting that skills shortages play a greater role in vacancies being hard-to-fill for Automotive Skills than for the SW as a whole.

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Qualifications in the workforce

- 20% of those employed within Automotive Skills have Level 1 as their highest qualification compared to 15% for the SW as a whole. 13% are without qualifications compared to 8% for the SW as a whole.
- 18% hold trade apprenticeships as their highest qualification compared to 6% for industries as a whole in the SW.
- 63% Automotive Skills establishments in the SW provided on or off the job training in the 12 months prior to the NESS07 survey, lower than the average for all industries as a whole in the SW (68%).

KEY DRIVERS AND ISSUES

Based on SW data for 2005/6:

- The numbers of FE/WBL enrolments in SW for sector related courses in 2005/6 were 2,480/1631, 95.5%/98.8% of which were for male learners
- The most popular courses among non-work based learners in FE were:
 - ∞ Award in Motor Vehicle Maintenance & Repair (Level 1) with 648 starts
 - ∞ Certificate in Motor Vehicle Maintenance & Repair (Levels 1&2) with 557 starts of which 18% were below L2
 - ∞ Certificate in Motor Vehicle Studies (Level 1) with 304 starts
- For work based learners, the NVQ in Motor Vehicle Maintenance & Repair the most popular with 1300 of the 1631 starts in 2005/6; the most popular level of study was instead Level 3 (98%), and study at Level 1 was very uncommon
- More than half of the public LSC funding went toward Level 1 courses, and 94.4% went toward Vehicle Maintenance/Repair courses
- 88% of employers agree that ever increasing technology and complexity of vehicles will result in an increased need for new training and up-skilling. In addition 74% 'definitely agreed' that 'the ability to use diagnostic IT equipment will be an absolute minimum requirement in all aftersales operations'. This clearly highlights the need for proficiency in general IT skills, particularly for technicians
- Management training is seen as a high priority among larger employers; smaller employers in contrast tend to concentrate mostly on technical training
- Very little HE delivery in the SW.

NSAS/COVES /14-19 DIPLOMA/HE (NATIONAL SKILLS ACADEMIES AND CENTRES OF VOCATIONAL EXCELLENCE)

There are two AutomotiveSkills CoVEs in the SW:

- Bridgwater College, Somerset, Automotive Engineering, Round 1, which started March 2002
- S & B Training in West of England, Centre for the Training & Licensing of Truck Technicians (CenTraL), Round 1 which started October 2002
- No expression of interest for an NSA has yet been submitted.

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KEY EMPLOYERS

- Most main car dealers work through the car manufacturers (Toyota, Ford, Honda, Nissan etc,) who co-ordinate Apprenticeship training through contracts with LSC National Employer Service
- ReMIT a subsidiary of the national employer federation, currently holds the contracts linked to the main manufacturer servicing dealerships
- Local colleges subcontract to deliver particular components of the apprenticeship programme on behalf of ReMIT
- 95% of car servicing is done through independent garages.

LOCAL & REGIONAL PROJECTS/NETWORKS

In Dorset, 4 cohorts of 30 Vehicle Maintenance Young Apprentices have been enrolled in local schools, who will complete an NVQ alongside their GCSEs, with work placements in good local employers.

SUMMARY OF SUPPLY

Source: LSC IPOL data (ILR extract)

Analysis of further education and work based data by Sector Skills Council footprint is not yet available for 2006/07. The data presented below relates to Train to Gain activity which can, in most cases, be attributed to a specific sector.

Automotive Skills Starts 06/07		
Starts	NVQ in Vehicle Body and Paint Operations	8
	NVQ in Vehicle Fitting Operations	13
	NVQ in Vehicle Maintenance and Repair	40
Total Starts		61

SUMMARY OF DEMAND

The broad skills issues reported through Stages 1 & 2 of the SSA process are:

- Management & Leadership Skills
- Employability Skills – attitudes and motivation
- Basic Skills – numeracy and literacy
- Generic Skills – communications, customer handling, problem solving, team working, etc.
- Technical Skills

Management and Leadership is reported as a key issue for the sector, the shortage and skills gaps in this critical function impacts on business development and thus workforce training.