

**IMR**Inc.

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# U.S. Household Perception of the Trades



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## Who We Are

IMR Inc. is a full-service automotive market research firm and leading provider of comprehensive insights and analysis for over 45 years. Through our time-tested methodologies and approach to research, we provide the intelligence necessary for expert-level understanding of the market forces that shape your customers' decisions.

## What We Do

### **Full-Service Market Research for The Automotive Industry**

Emerging technology, market dynamics, product reliability and shifting consumer habits and trends make obtaining the most accurate research and relevant insights more important than ever. IMR Inc. specializes in providing targeted market intelligence for the automotive OE and aftermarket segments, offering a range of strategic and tactical research solutions, expert insights and comprehensive analysis to help you understand your customers and what drives their decisions.



The U.S. workforce is struggling to fill a massive gap in the skilled trades industry and over the next decade, the problem may worsen. According to the U.S. Bureau of Labor Statistics, there are millions of skilled trade job vacancies. As of September 2022, unemployment was measured at 3.5 percent, which is normally considered full employment. Compounding the issue is the labor force participation rate, which is at an all-time low. The U.S. may continue to see a large deficit of workers, especially those in the skilled trades, for some time to come.

Many organizations that support the trades have done research and developed market conditions detailing specific trade shortages including construction, manufacturing, and others. Most recently, the TechForce Foundation released its 2022 Transportation Technician Supply and Demand study focusing on the current and future demand for automotive technicians. As of the release of the study, TechForce estimates the cumulative total job demand for automotive technicians to reach over 600,000 by 2026.

As an automotive market research firm, IMR developed insights specifically for the automotive industry. This study has been conducted the first quarter of each year since 2020 amongst a representative sample of 25,000 U.S. households per quarter. The goal of the study is to understand and track U.S. households' overall impression of the trades and to understand the perceptions and level of recommendation of the trades, particularly among households guiding a child through making career and post secondary education decisions. In particular, the study focuses on household's perceptions of a career as an automotive technician including their perceptions of the educational skillsets needed, cost of education, career outlook, opportunities for women, earning opportunities, job security and more.

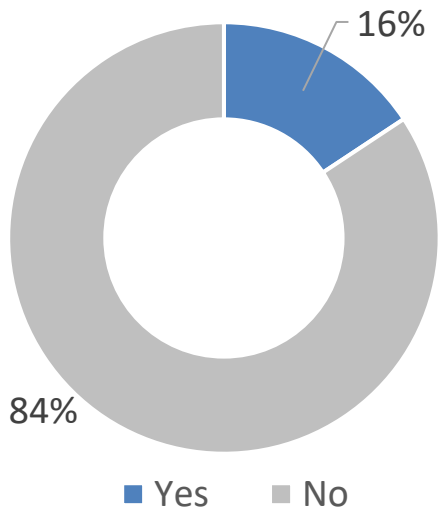
Employment statistics tell us the skilled worker shortage seems here to stay. Ultimately, this means the auto industry must compete against other skilled trades to attract top talent. This research is meant to provide benchmarks for the automotive industry and to help provide an understanding of what barriers need to be addressed and what strengths need to be highlighted when developing strategies for winning the war for talent.

# PARENTS ARE DISCUSSING OPTIONS WITH THEIR CHILDREN

In Q1 2022, 16% of the 25,000 households surveyed indicated they were discussing career options with a child. 70.9% were discussing community college or a 4-year degree as a higher education option. 68.6% of parents personally recommended those options to their child. However, when asked which option their child was most seriously considering or preferred, 40.8% responded community college or a 4-year degree. 44.9% of households were discussing trade school, apprenticeships, or certification programs and 41.0% recommended those as options.

While 15.1% were discussing entering the workforce immediately and 11.5% of parents recommended that, 29.8% said their child was most seriously considering or preferred to enter the workforce immediately. When asked if their child intended to pursue a job in the trades were they to enter the workforce immediately, 84.5% said yes.

Discussing Career Options with a Child?

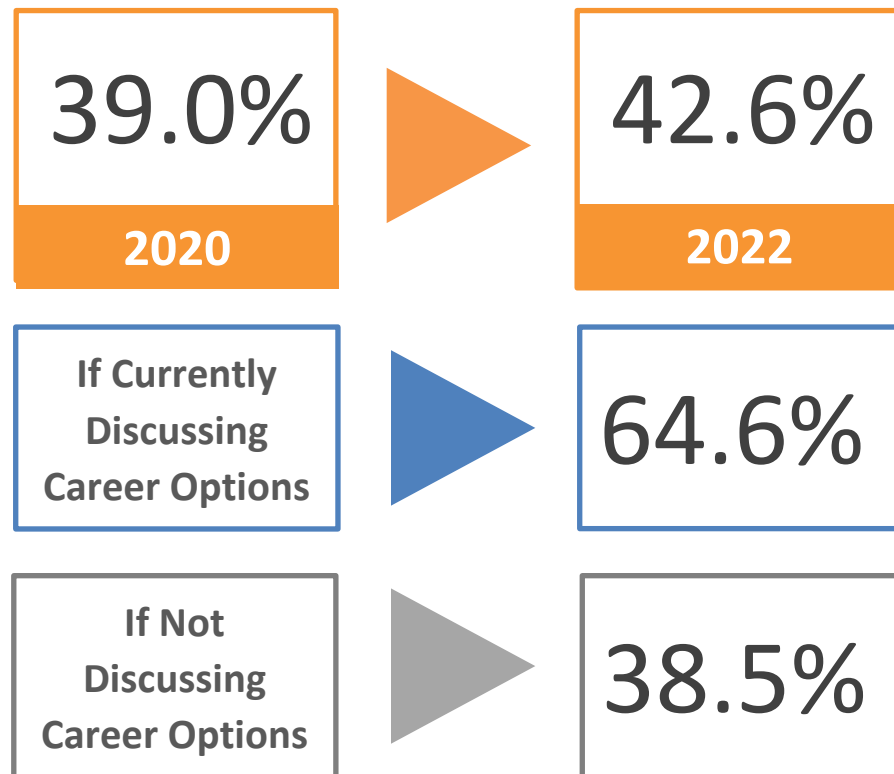


	Career Options Discussed	Parent Personally Recommended	Child Seriously Considering/Prefers
4-year college	45.6% <sup>1</sup>	45.5% <sup>1</sup>	33.5% <sup>1</sup>
Community college	25.3% <sup>2</sup>	23.1% <sup>2</sup>	7.3%
Trade school	17.5%	16.1%	8.4%
Certification Program	15.8%	13.8%	3.6%
Entering the workforce immediately	15.1%	11.5%	29.8% <sup>2</sup>
Apprenticeship	11.6%	11.0%	2.0%
Gap Year	9.0%	7.2%	1.7%

## HOW ARE THE TRADES PERCIEVED?

Overall, 42.6% of households surveyed said if their child or a family member were considering a career in the trades, they would be extremely likely to recommend the trades as an occupation. In 2020, only 39% said they would make that recommendation. If the household is currently having discussions with a child about career options and that child was considering a career in the trades, 64.6% would be extremely likely to recommend the trades. However, of the households that are not discussing career options with a child, only 38.5% would recommend the trades.

### Would Recommend the Trades



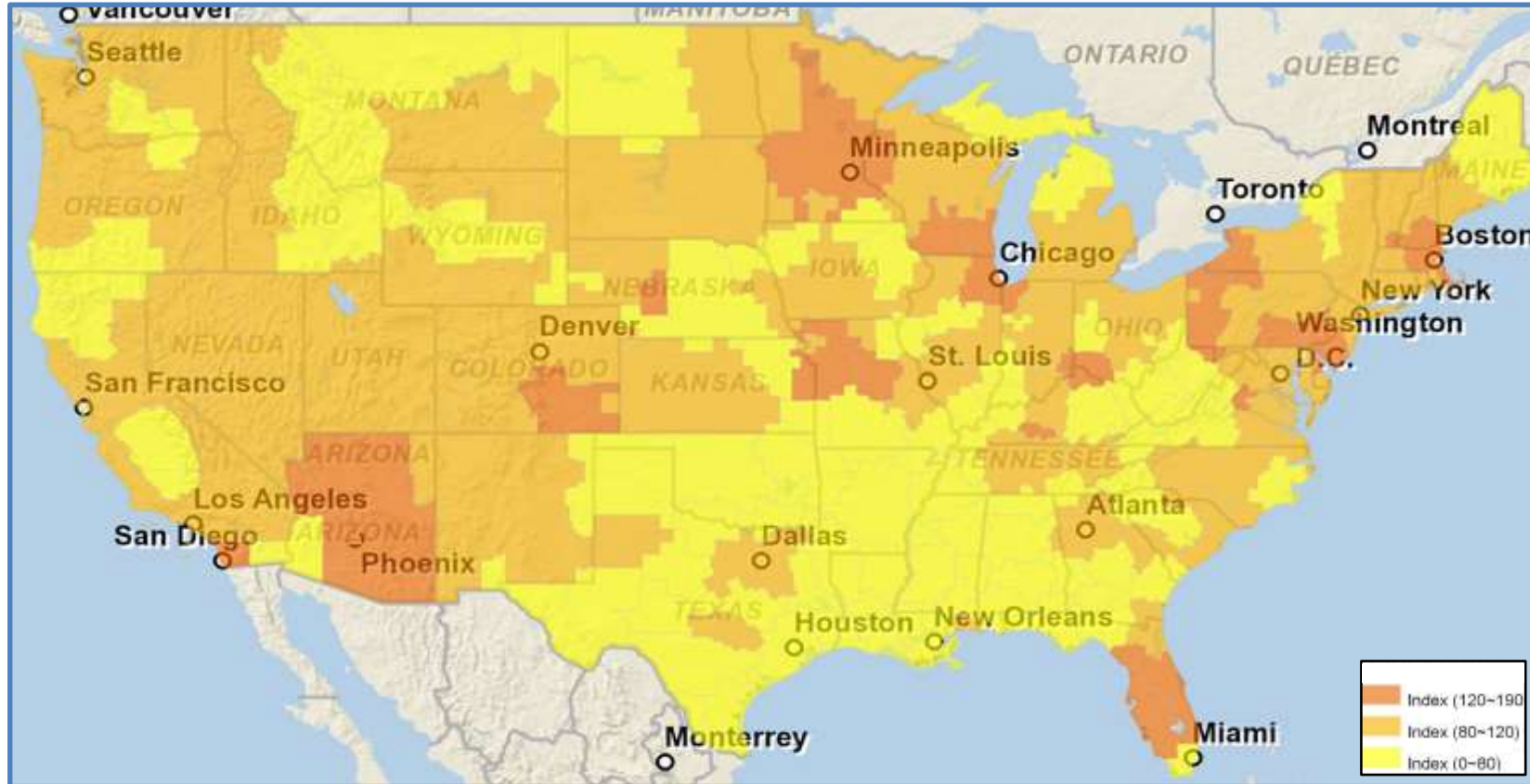
How likely would you be to recommend each of the following opportunities in the trades? (Extremely Likely)	
Electrician	58.7%
HVAC Installation/Repair	49.4%
Aircraft Maintenance/Repair	47.9%
Plumber	44.8%
Automotive Technician	43.1%
Welder	38.7%
Heavy Duty/Diesel Technician	38.2%
Industrial Machinery Service/Repair	36.4%
Crane Operator	34.8%
Wind Turbine Technician	34.5%
Construction	34.1%
Mobile Heavy Equipment Service/Repair	33.6%
Brick Mason	29.1%
Rotary Drill Operator (Oil and Gas)	25.5%

## DISCUSSING CAREER OPTIONS AND EXPOSURE MATTERS

While overall recommendation of the trades is 42.6%, up from prior years, those discussing career options with a child and those that know someone in the trades tend to be more likely to recommend the trades, 64.6% and 61.1% respectively. Discussing career options and having a family member or friend in the trades affects their recommendation as well. For example, while automotive technician ranks 5<sup>th</sup> overall, if a household is discussing career options with a child it rises to number three. If the family knows someone that works in the trades, automotive technician rises to the fourth position.

	How likely would you be to recommend each of the following opportunities in the trades? (Extremely Likely)		Currently Discussing Career Opportunities With a Child?		Have a Family Member/Friend that Works in Trades?	
	Total	Yes	No	Yes	No	
Electrician	58.7%	62.1%	58.0%	67.0%	53.9%	
HVAC Installation/Repair	49.4%	51.2%	49.0%	57.2%	44.9%	
Aircraft Maintenance/Repair	47.9%	65.3%	44.3%	56.9%	42.7%	
Plumber	44.8%	45.2%	44.7%	50.1%	41.8%	
Automotive Technician	43.1%	53.9%	40.8%	51.5%	38.3%	
Welder	38.7%	38.3%	38.8%	44.7%	35.3%	
Heavy Duty/Diesel Technician	38.2%	47.9%	36.2%	47.5%	32.9%	
Industrial Machinery Service/Repair	36.4%	40.0%	35.6%	42.2%	33.0%	
Crane Operator	34.8%	42.9%	33.1%	42.0%	30.6%	
Wind Turbine Technician	34.5%	40.7%	33.2%	39.2%	31.8%	
Construction	34.1%	38.7%	33.2%	39.9%	30.8%	
Mobile Heavy Equipment Service/Repair	33.6%	32.7%	33.8%	38.3%	30.9%	
Brick Mason	29.1%	42.1%	26.4%	34.9%	25.8%	
Rotary Drill Operator (Oil and Gas)	25.5%	28.3%	24.9%	28.8%	23.6%	

# WHERE ARE THE PARENT ADVOCATES?



**Rank: Highest Likelihood to Recommend**

- Erie, PA
- San Diego, CA
- Tucson (Sierra Vista), AZ
- Charlottesville, VA
- Orlando, FL
- Milwaukee, WI
- North Platte, NE
- Phoenix (Prescott), AZ
- Colorado Springs, CO
- Madison, WI
- Bowling Green, KY
- Chicago, IL
- Buffalo, NY
- Cincinnati, OH
- Tampa et al, FL
- Gainesville, FL
- Columbia, MO
- Boston, MA-NH
- Pittsburgh, PA
- Kansas City, MO-KS
- Harrisburg et al, PA
- Minneapolis-St. Paul, MN
- Philadelphia, PA

Would Recommend  
the Trades

52.2%

Urban

41.6%

Suburban

61.6%

Rural

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# Career Perceptions: Automotive Technicians

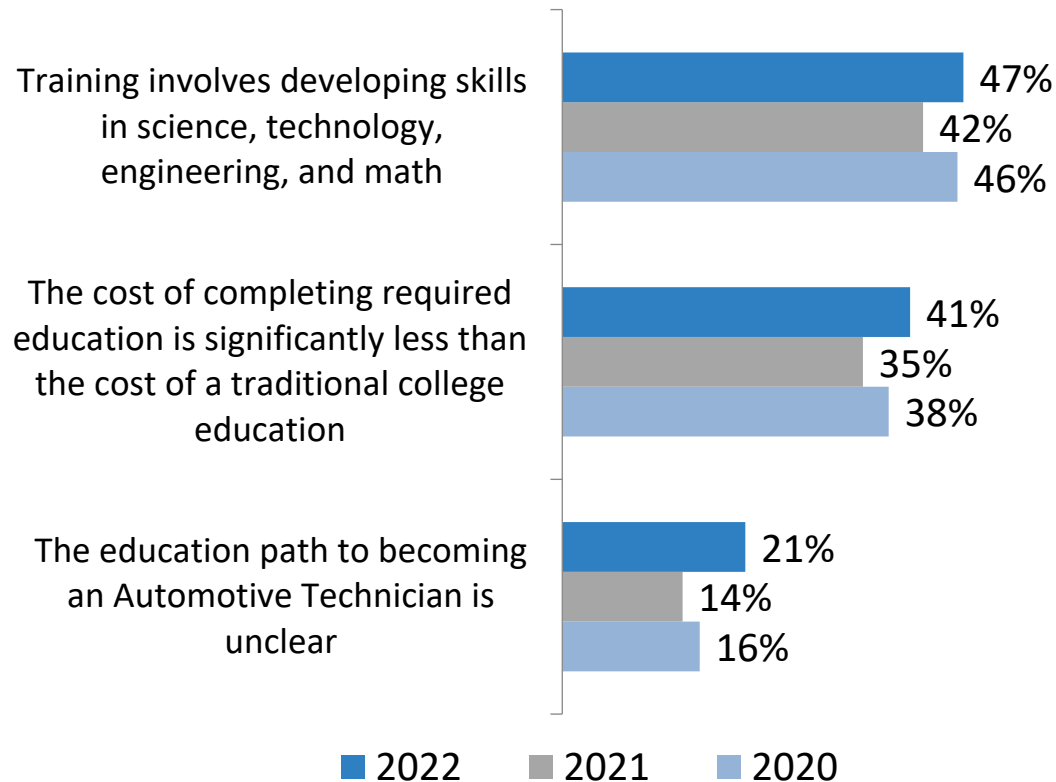


# EDUCATIONAL SKILLSET AND COSTS

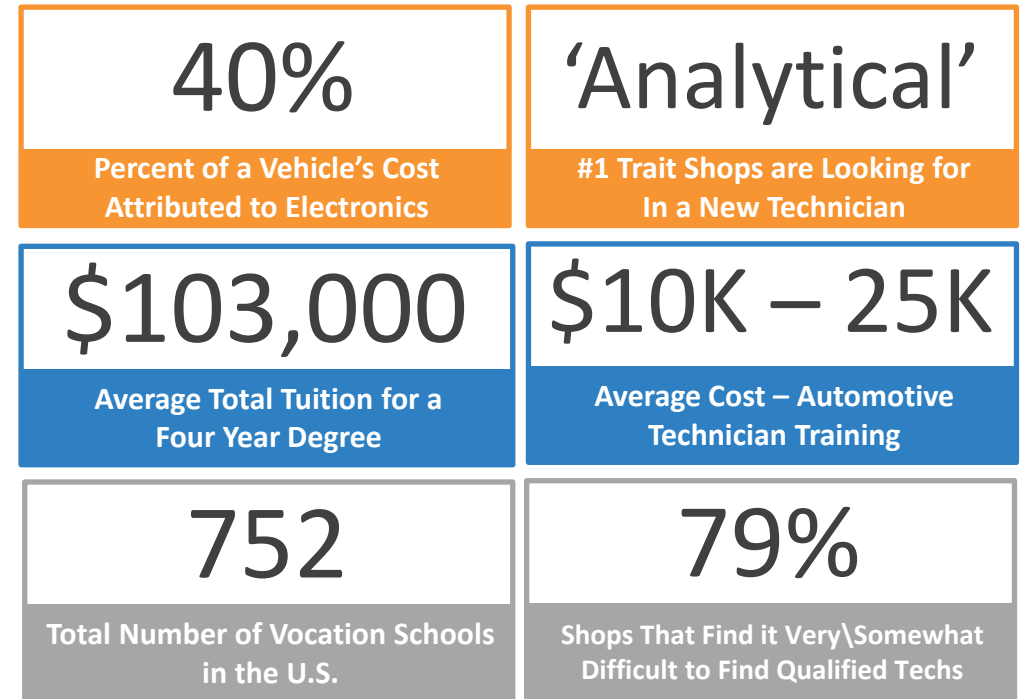
There is some recognition of the cost differential between automotive technician training and a traditional college education (41%). While there's an acknowledgment that STEM skills are needed to be trained as an automotive technician, less than half fully agree with that statement.

## EDUCATIONAL SKILLSET

% Top 2 Box Agreement (Rating of a 7 or 6)



## Technician Education Quick Stats

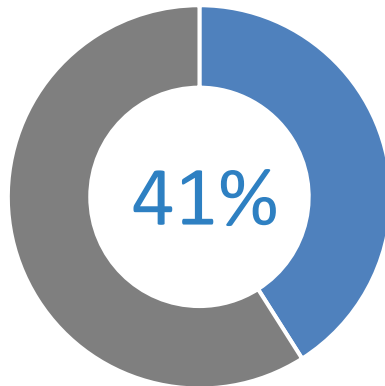


Sources: IMR Inc. Repair Shop Tracking Study; National Center for Education Statistics - Education Data Initiative; IPEDS database; TechForce Foundation: Technician Supply and Demand Report

# EDUCATIONAL COSTS

Awareness of the educational cost gap between technical training and traditional college is higher among males, higher earners and those with more educational experience.

The cost of completing required education is significantly less than the cost of a traditional college education



% Top 2 Box (Rating of a 7 or 6)



46%



36%

Household Income



31%

< \$50,000

39%

\$50,000 - \$99,999

52%

\$100,000 >

Highest Level of Education



39%

High School or Less

36%

Some College

41%

2-yr Technical Training

38%

College

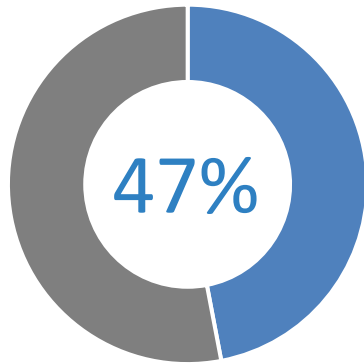
44%

Post Graduate

2022— % Top-Two Box Agreement Statement

People who personally know someone in the trades or have a 2-year technical training degree are more likely to believe automotive training develops STEM skills.

Training involves developing skills in science, technology, engineering and math



% Top 2 Box (Rating of a 7 or 6)



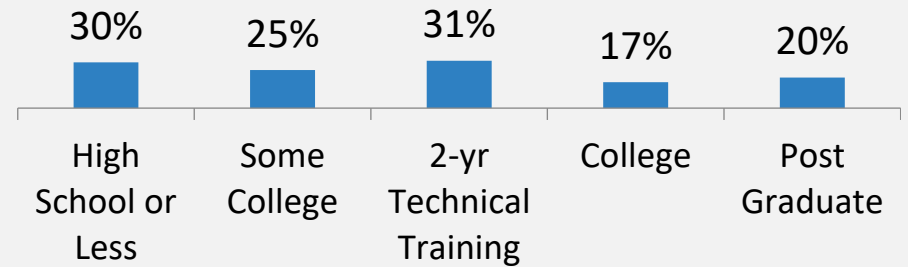
49%

Close family member/friend works in trades

39%

No close family member/friend works in trades

Highest Level of Education

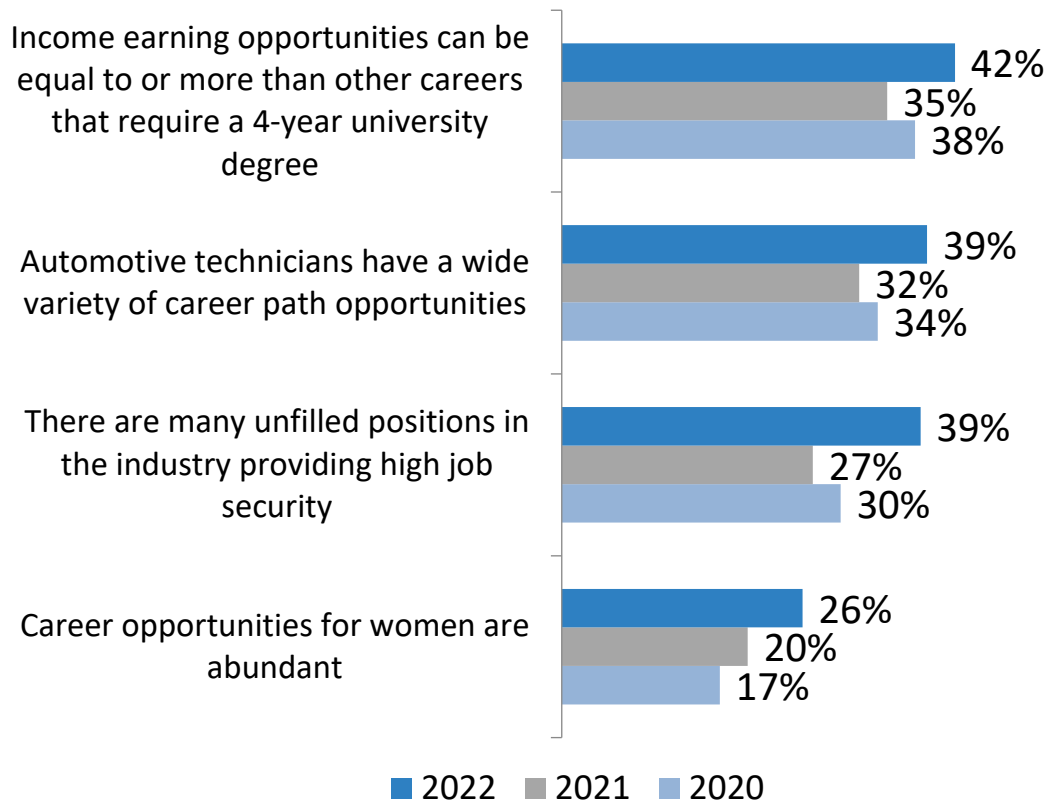


2022— % Top-Two Box Agreement Statement

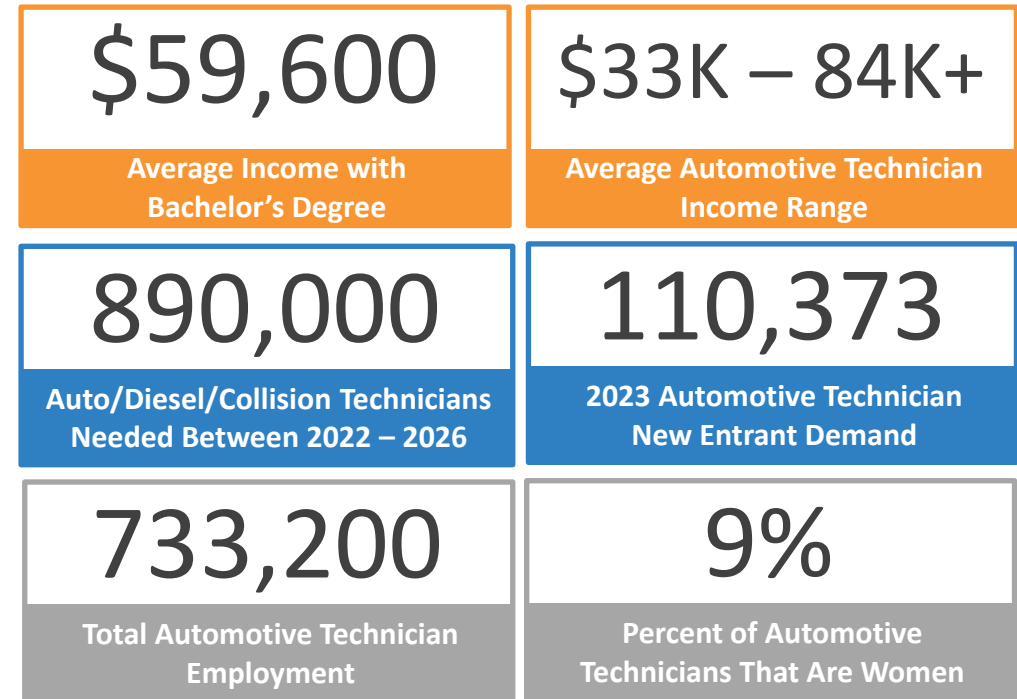
According to the 2022 TechForce Foundation – Technician Supply and Demand Report, the 5-year period from 2022 to 2026 shows new entrant automotive technician demand is expected to increase slightly and the demand created by labor force exits and occupational transfers will drive the demand to nearly 600,000 positions over this same time period.

**CAREER OUTLOOK**

**% Top 2 Box Agreement (Rating of a 7 or 6)**



**Automotive Technician Quick Stats**

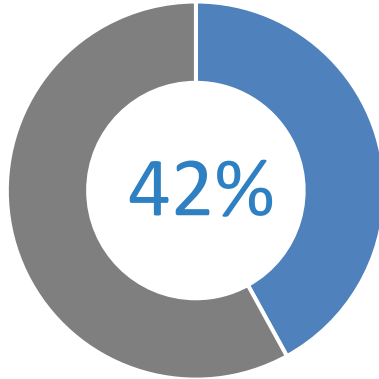


Sources: 2020 [www.bls.gov](http://www.bls.gov), 2020 US Census Bureau, National Center for Education Statistics, Annual Earnings by Educational Attainment

# EARNING OPPORTUNITIES

People who personally know someone in the trades and younger generations are more likely to believe that income earning opportunities for automotive technicians are on par with careers that require a college degree.

Income earning opportunities can be equal to or more than other careers that require a 4-year university degree



% Top 2 Box (Rating of a 7 or 6)



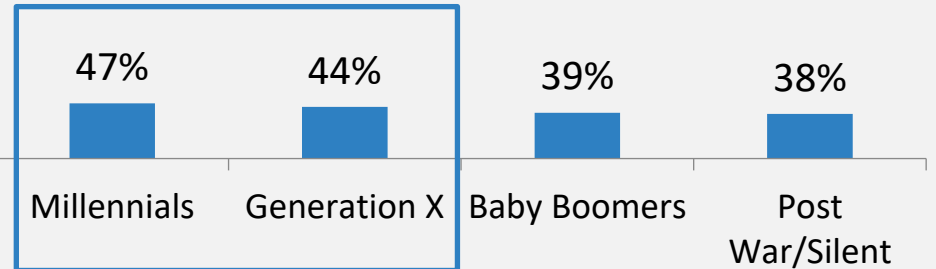
52%

Close family member/friend works in trades

38%

No close family member/friend works in trades

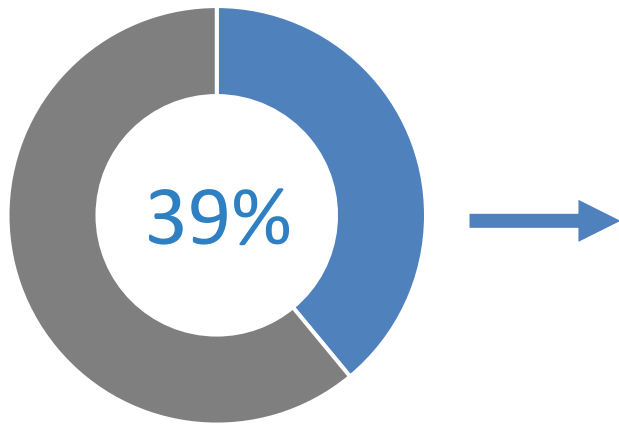
Generation



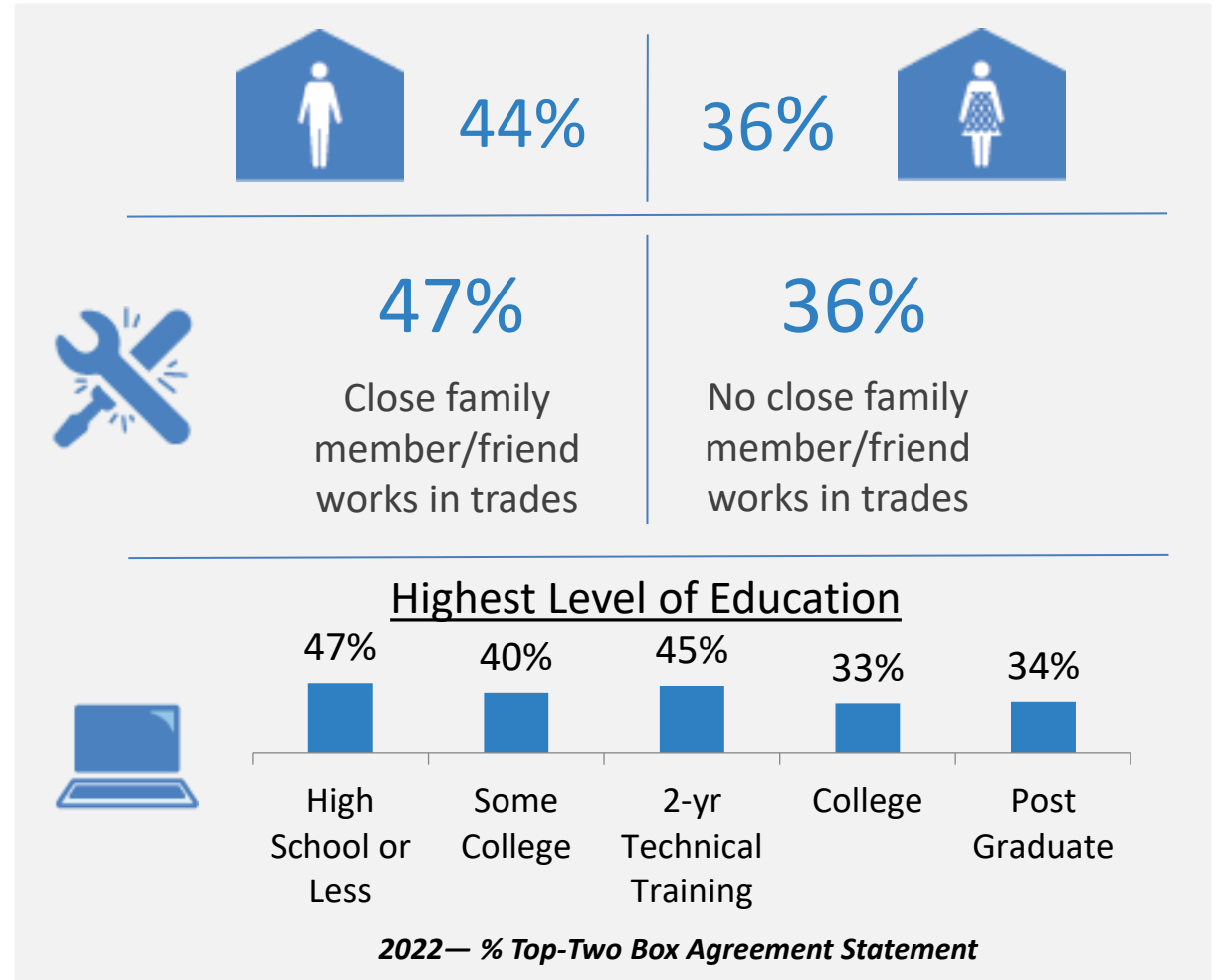
2022— % Top-Two Box Agreement Statement

Awareness of the variety of career paths for automotive technicians is higher among males, those who personally know someone working in the trades, and those with less educational experience.

Automotive Technicians have a wide variety of career path opportunities

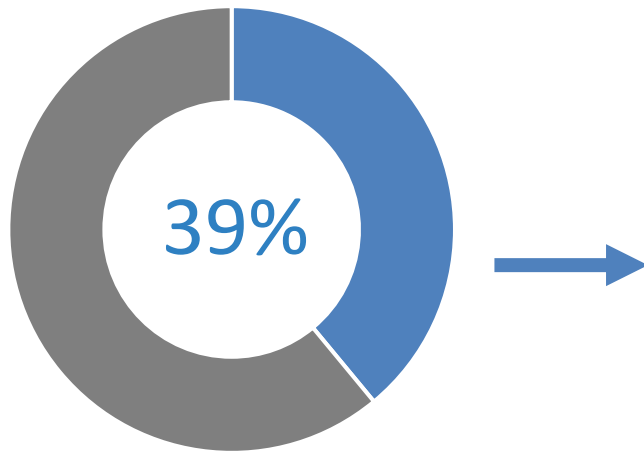


% Top 2 Box (Rating of a 7 or 6)



Males and those who personally know someone in the trades are more likely to believe there are unfilled positions in the industry, leading to greater job security.

There are many unfilled positions in the industry providing high job security



% Top 2 Box (Rating of a 7 or 6)



45%



33%



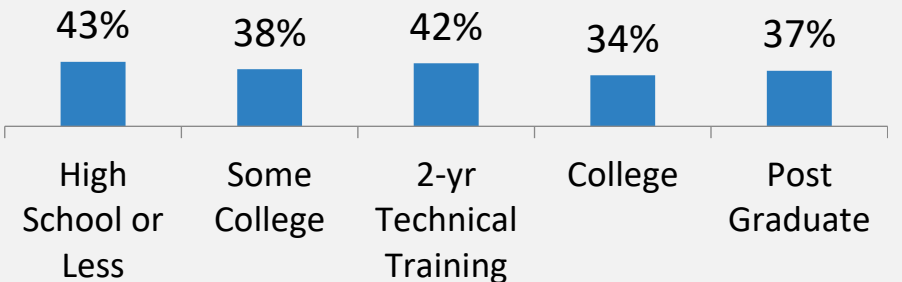
46%

Close family member/friend works in trades

35%

No close family member/friend works in trades

Highest Level of Education

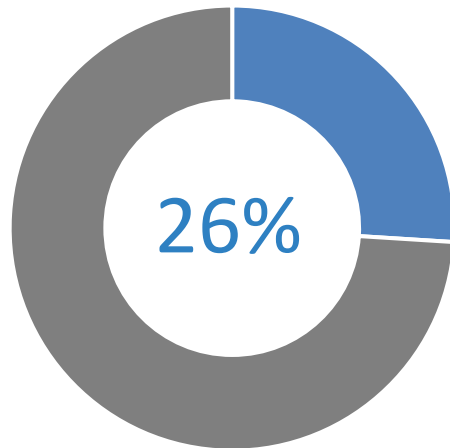


2022— % Top-Two Box Agreement Statement

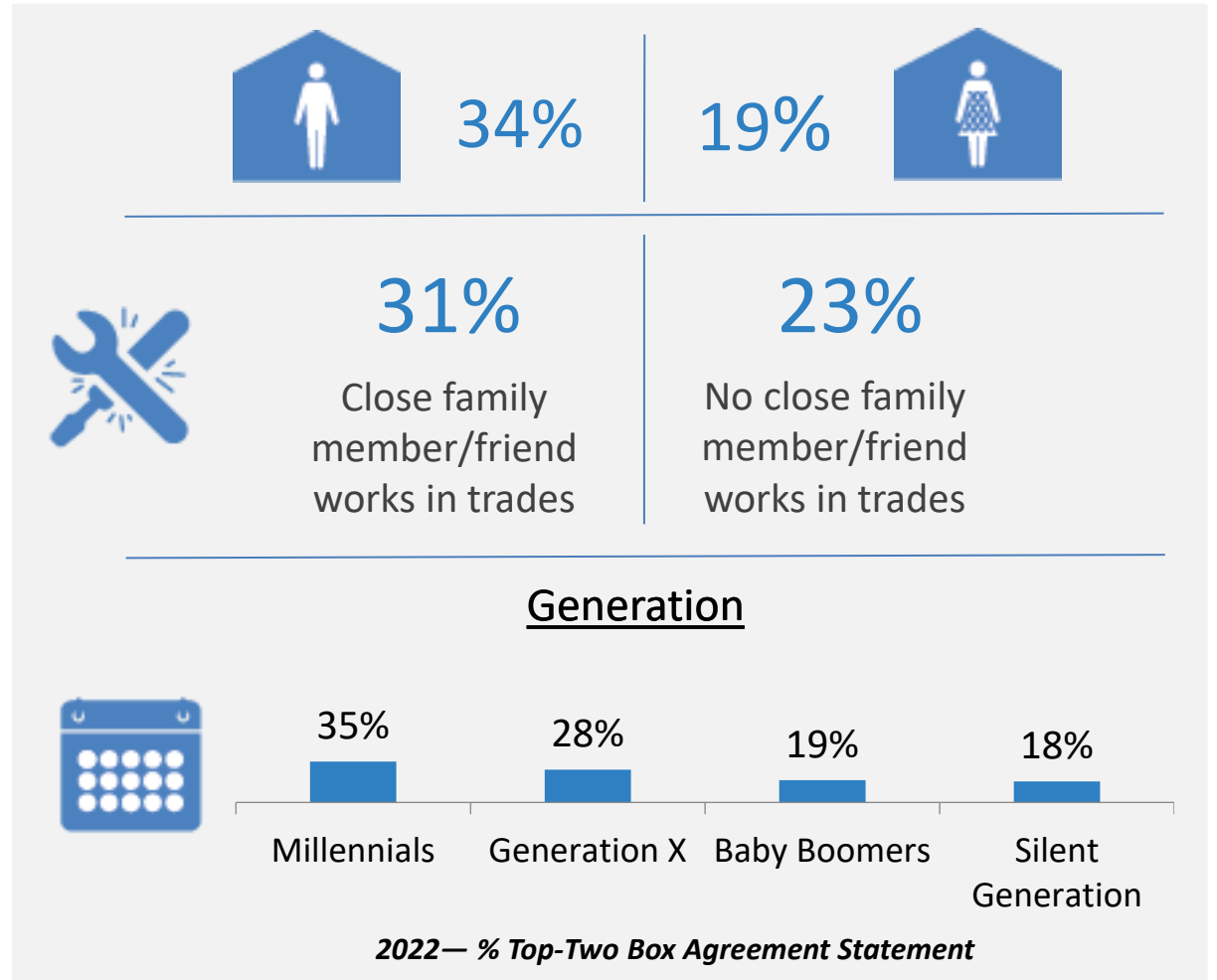
# OPPORTUNITIES FOR WOMEN

Each successive generation is more likely to think that there are opportunities for women in the industry, but women themselves are less likely to agree.

Career opportunities for women are abundant



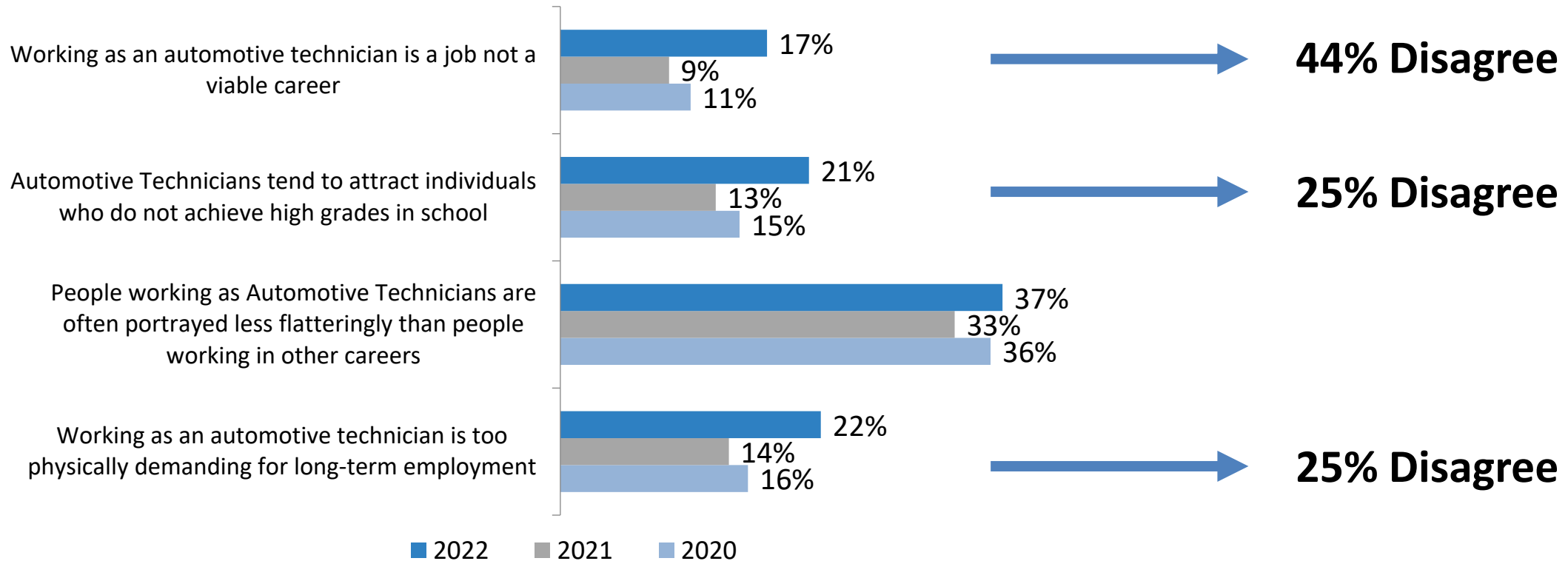
% Top 2 Box (Rating of a 7 or 6)





More than a third of respondents believe technicians are often portrayed negatively and while 17% believe being an automotive technician is a job, not a career, 44% disagree. People’s perceptions are, generally, split on the individuals the trade attracts and whether being an automotive technician is too physically demanding.

**PERCEPTIONS ABOUT AUTOMOTIVE TECHNICIANS**  
% Top 2 Box Agreement (Rating of a 7 or 6)



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# Quick Stats

## QUICK STATS | SUMMARY OF FINDINGS

- Of the households discussing career options with a child, 45.5% said they were discussing a 4-year college degree as an option amongst other options. 45.6% said they were recommending that option to their child.
- When asked what option their child was most seriously considering, 33.5% said a 4-year college degree while 33.8% said entering the workforce immediately. When asked if their child intended to pursue a job in the trades were they to enter the workforce immediately, 84.5% said yes.
- In 2020, 39% of all households said they'd recommend the trades if their child was considering it. In 2022, 42.6% said they would recommend the trades.
- If a household has a family member or friend that works in the trades, 64.6% said they would recommend the trades as a career option. If not, only 38.5% would.
- Amongst all households, whether discussing career options or not, the top 3 trades that they would recommend are: electrician, HVAC installation/repair and aircraft maintenance/repair. Automotive technician was 5<sup>th</sup>. If the household is currently discussing career options, automotive technician ranks third.
- Rural households (61.6%) and urban households (52.2%) are more likely to recommend the trades than those households in the suburbs (41.6%).
- While there's an acknowledgment that STEM skills are needed to be trained as an automotive technician, less than half fully agree with that statement (47%).
- 'Analytical/Problem Solver' is the number one trait repair shops are looking for in a new automotive technician.
- There is recognition of the cost differential between automotive technician training and a traditional college education. 41% fully agree that the cost of completing the required education to become an automotive technician is significantly less than the cost of a traditional college education.
- 42% fully agree that income earning opportunities for automotive technicians can be equal to or more than other careers that require a 4-year university degree. Younger generations are more likely to agree with this statement than older generations.
- 39% fully agree that there are many unfilled positions in the industry providing high job security for automotive technicians. Men and households that know someone in the trades are more likely to agree.
- Awareness of the variety of career paths for automotive technicians is higher among males (44%) than the general population (39%). Households who personally know someone working in the trades (47%), and those with less educational experience (44%) are more likely to agree.
- 26% of households fully agree that career opportunities for women are abundant. Each successive generation is more likely to think that there are opportunities for women in the industry (Millennials = 35%), but women themselves are less likely to agree (19%).
- More than a third of respondents believe technicians are often portrayed negatively and while 17% believe being an automotive technician is a job, not a career, 44% disagree. People's perceptions are, generally, split on the individuals the trade attracts and whether being an automotive technician is too physically demanding.

**FOR MORE INFORMATION**

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