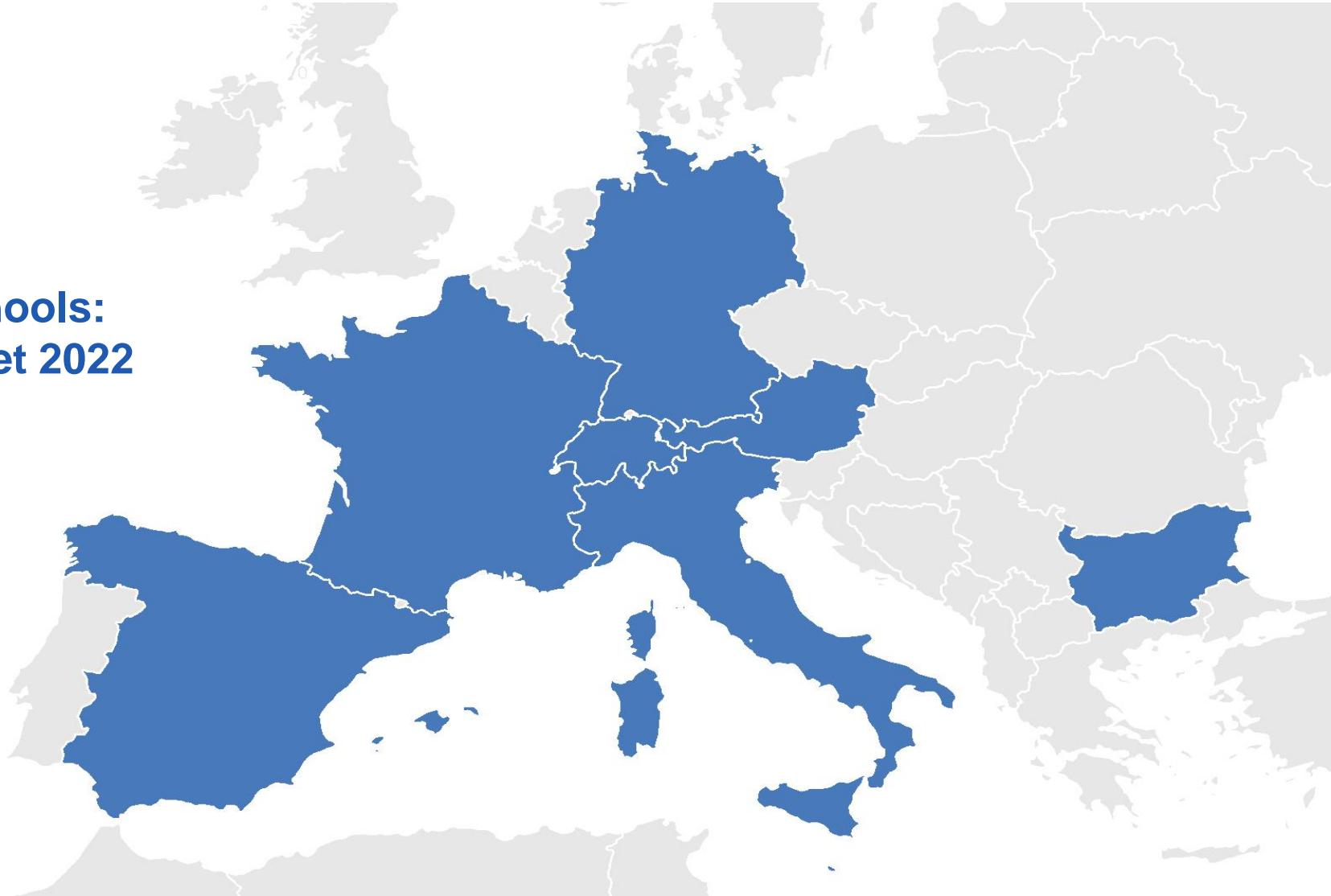


Presentation

-of the representative
survey among 400 driving schools:
MOVING Driving School Market 2022

-of the representative survey
among 803 learner drivers/
driving licence holders
MOVING Trend Study 2022

Jörg-Michael Satz



Stitch design



Target group

(Co-)decision-makers in driving schools in Germany



Market

Driving schools in Germany



Method

CATI - telephone interviews



Period & Implementation

25 January until 6 February
MiiOS GmbH, Nuremberg



Sample

N= 400 interviews (net number of cases) by random sample



Face-to-face theory lessons mean a spatial and temporal interaction of learner drivers at the same physical location under the direction and moderation of a real-life instructor.

Asynchronous e-learning includes the processing of e-learning offers that can be accessed independently of time (e.g. learning videos, apps). There is either no joint learning with other learners or this is only possible to a very limited extent.

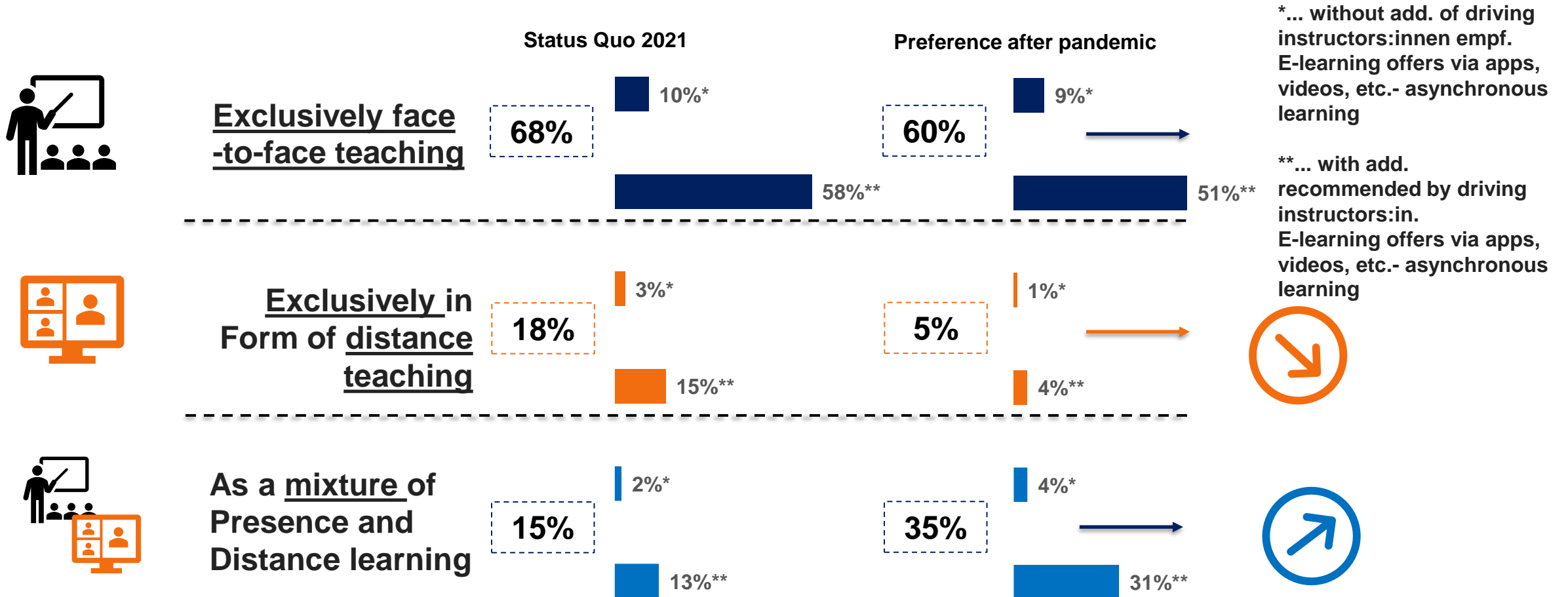
Blended learning is a mixture of the two methods above: face-to-face teaching with additional e-learning offers for (asynchronous) independent theory learning.

"Distance theory teaching"- Synchronous e-learning offers require all participants to be connected at the same time via the internet. In a virtual space via Webex, Zoom etc. they hear and see the same learning offers and can communicate with each other.

9 out of 10 small driving schools offered only face-to-face theory lessons! After the pandemic, driving schools want face-to-face lessons with their own e-learning offer for asynchronous learning - or a mixed form!

E-learning: Status Quo / Preference after Pandemic

How do you currently offer theory training to your driving students?

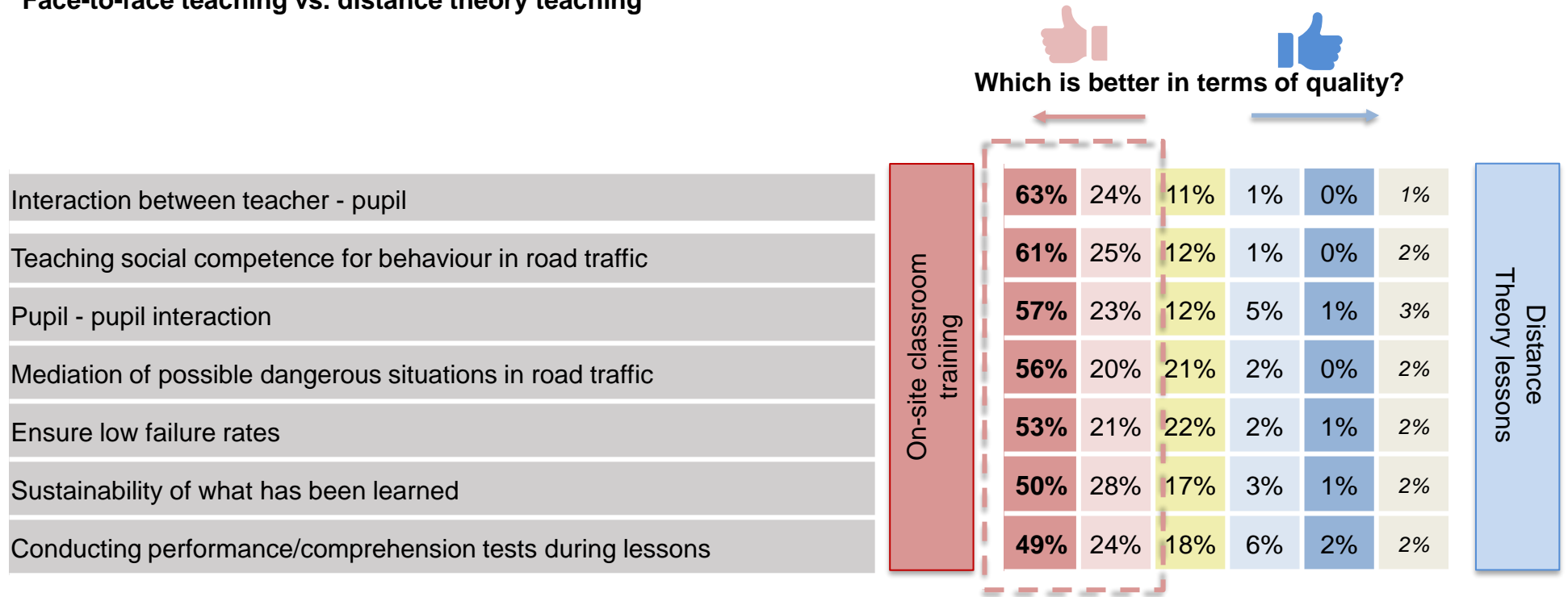


The quality of face-to-face lessons is clearly rated better by driving instructors than distance theory lessons.

E-learning

Let's now move on to the evaluation of online theory classes in comparison to face-to-face classes on site (synchronously, i.e. simultaneously).

Face-to-face teaching vs. distance theory teaching

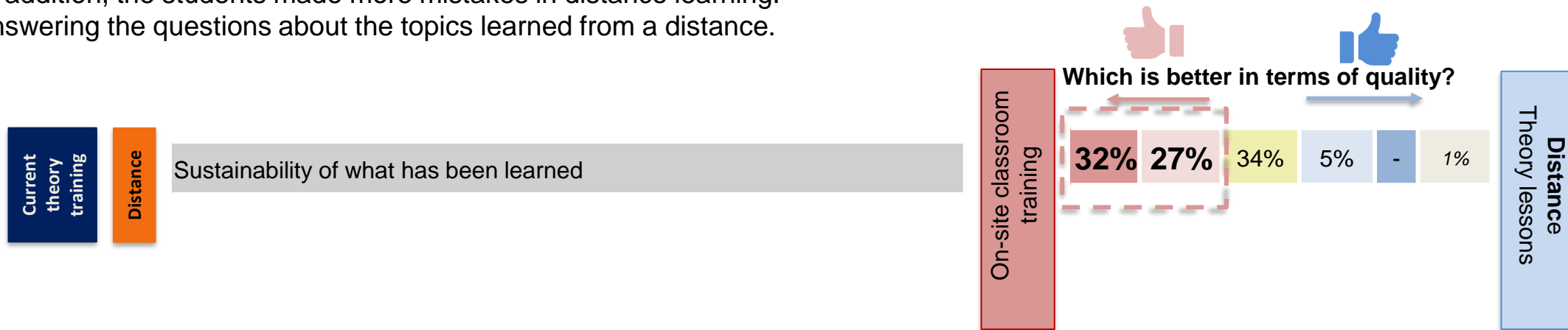


8 out of 10 (78%) driving school owners confirm that what is learned in face-to-face lessons is more sustainable than in distance lessons.

Even 59% of "distance driving schools" find that what is learned is more sustainable in face-to-face lessons.

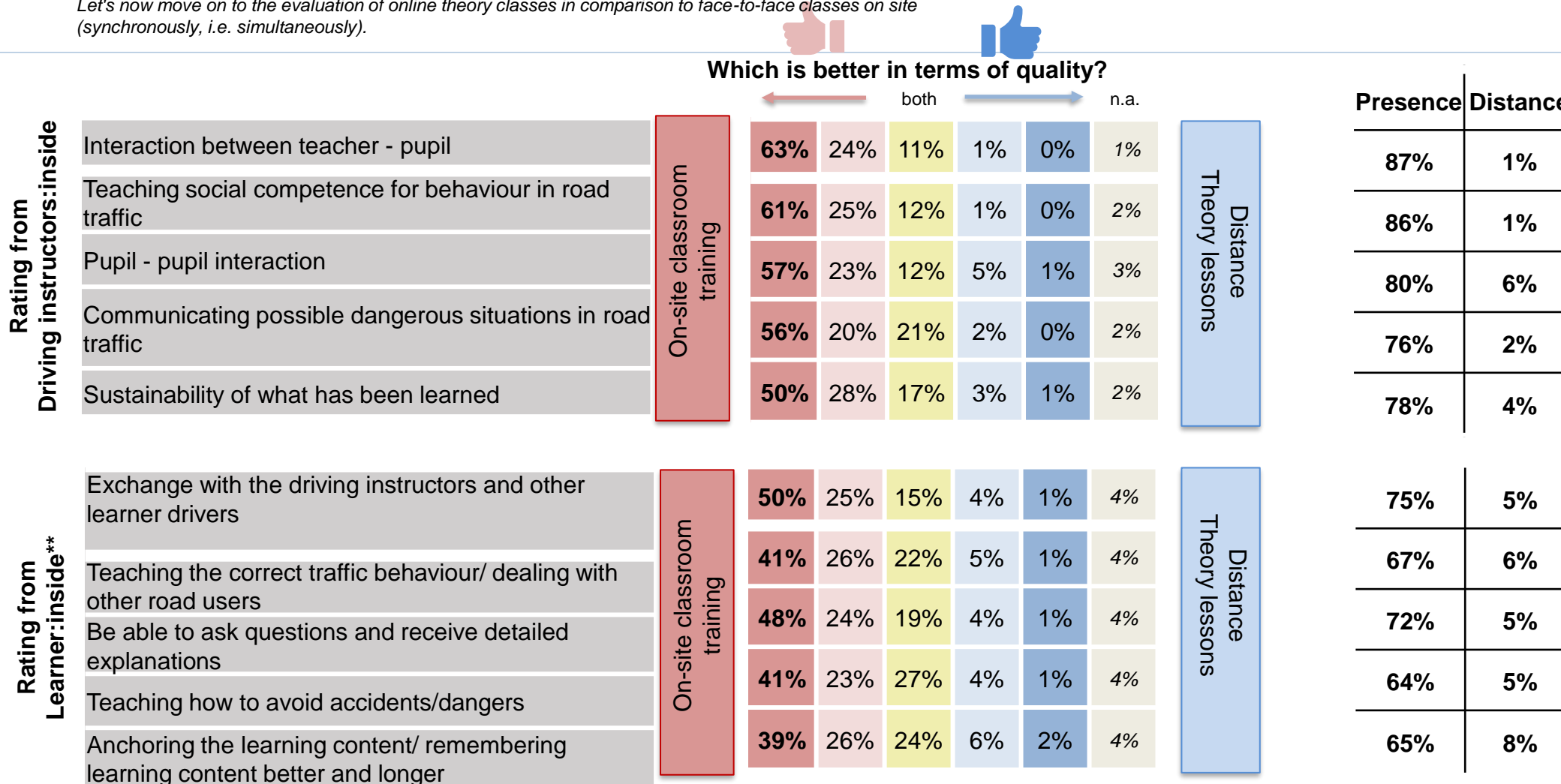
These survey results are also confirmed by the neurophysiological study on cognitive attention in face-to-face and distance learning by Prof. Babiloni.

It shows that didactics are experienced differently in the classroom and in distance learning. As it turned out, the subjects' engagement was initially similar in both situations, but their attention to the subject's needs decreased. The participants in the distance learning classes already lost their energy after 20 minutes. In addition, the students made more mistakes in distance learning. answering the questions about the topics learned from a distance.



Comparison: The quality of face-to-face lessons is clearly rated better by driving instructors and learner drivers than distance theory lessons.

Let's now move on to the evaluation of online theory classes in comparison to face-to-face classes on site (synchronously, i.e. simultaneously).



E-learning

Impact of increasing distance theory teaching: Learner drivers have to expect more practice hours and higher total costs!



International Road Safety Association e.V.

E-learning

How do you think increasing online teaching will affect theory education overall in the following areas?

Statements - Share Top2 Box	...will rise	No effects	...will sink
Base	400		
Number of practical driving hours required (of the learner drivers)	47%	48%	3%
Total costs for the driving licence	43%	46%	10%
Road safety of novice drivers	13%	42%	42%

Additional driving lessons:

Almost half of the driving schools expect additional driving hours:

- Old Federal States- 46%; New FS- 51%
- 44% agreement among small schools; 57% of large driving schools (250Tsd.€-500Tsd.€) agree.

The number of additional practical driving hours increases- Ø 8 hours:

- Location: Rural: +10 / Big city: +7
- Schools size: smaller: +9 / larger: +7
- Current training pure distance: +5*

Total cost:

- Old FS- 41%; New FS- 45%
- Small schools- 43%; Large Driving schools- 24%

Road safety of learner drivers could suffer:

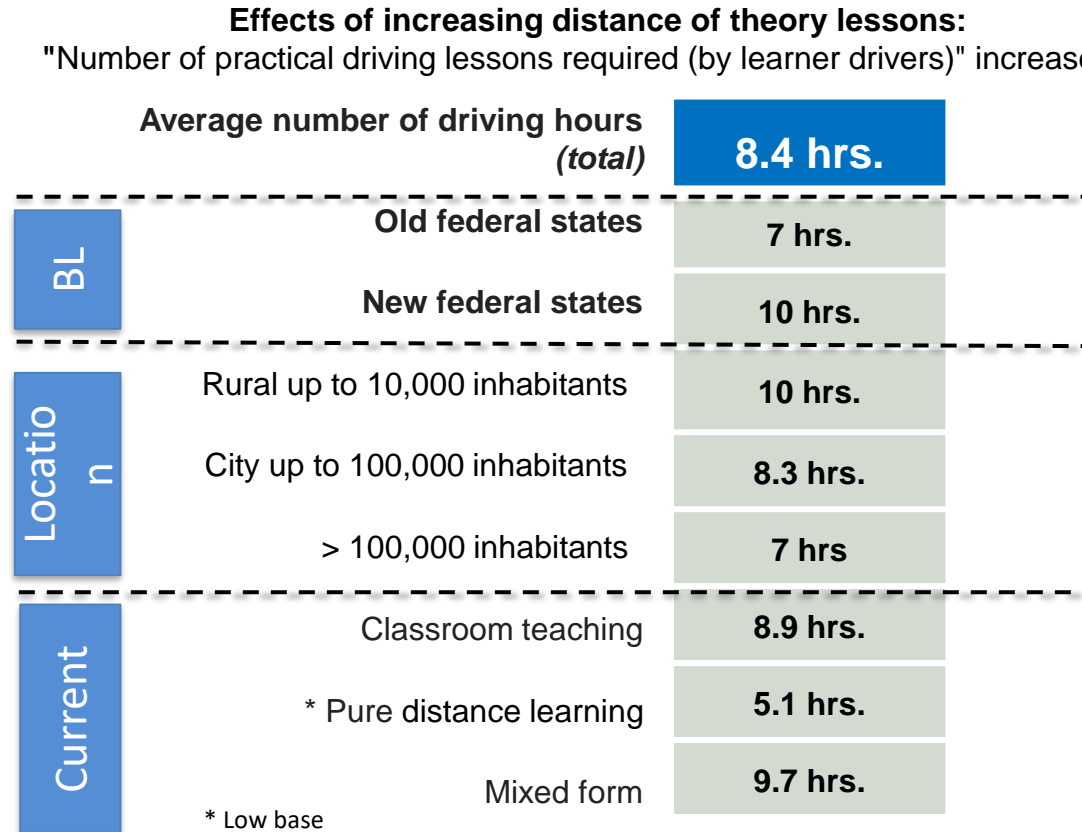
- 42% of the respondents assume that the road safety of novice drivers will decrease.

* Low base

Impact of increasing distance theory teaching: Learner drivers have to expect more practice hours and higher total costs!

E-learning

How many more practical driving lessons do you think learner drivers will need on average than before?



- Shifting theory lessons to the car:

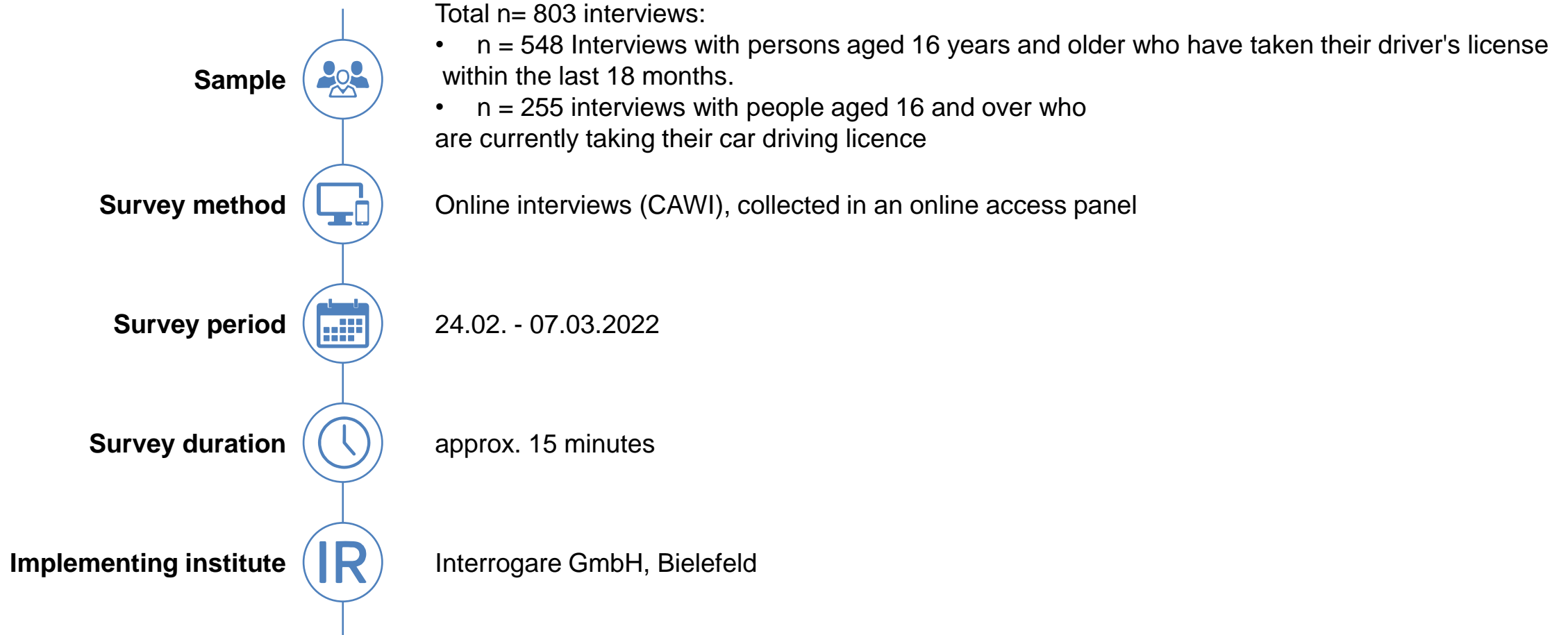
47% of the driving schools are convinced that more practical driving lessons are needed due to the **distance theory training**. Driving lessons are needed.

- This may mean that the contents of the **distance theory lessons** have not been taught/internalised enough to drive safely through the roads- **road safety decreases**.

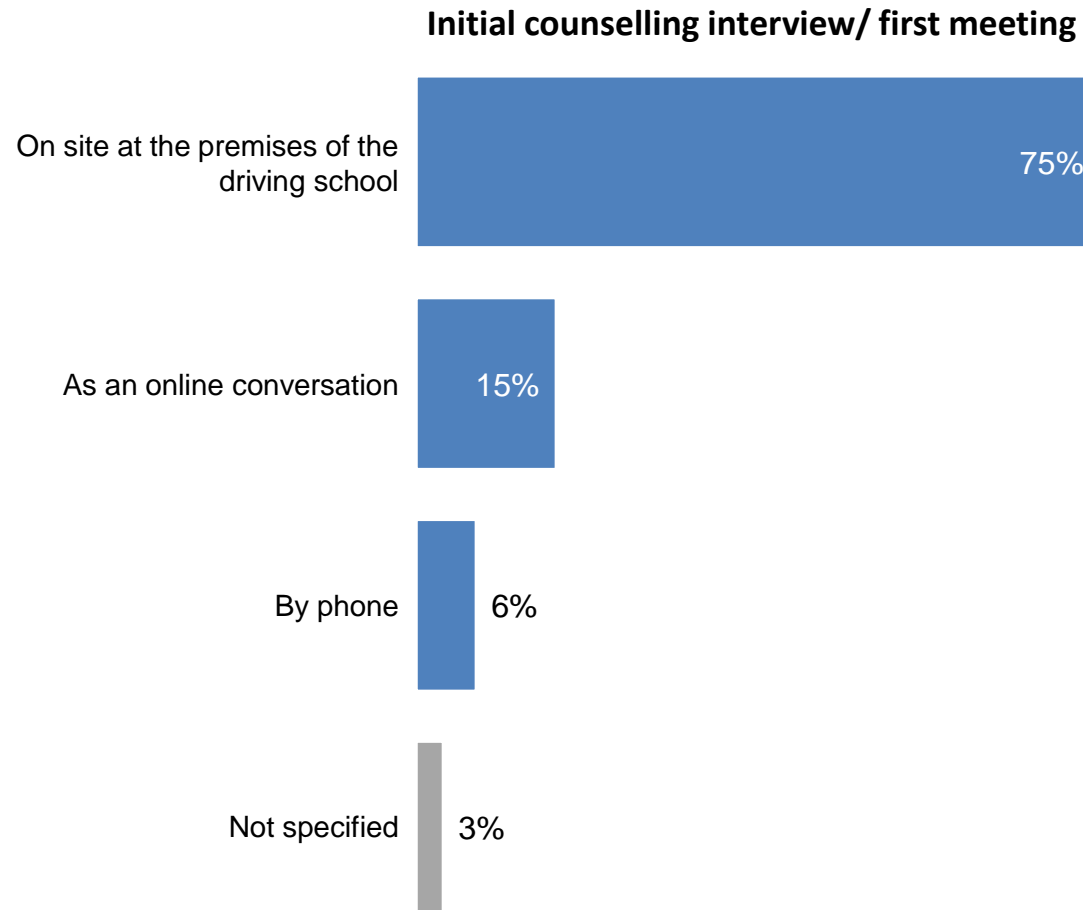
- More driving hours - more costs:

Distance learning in driving schools makes driving licences more expensive! Not cheaper, as many advocates claim.

Stitch design



Question: In your opinion, how should the first consultation/ initial meeting (before registration) with the driving school most likely take place?



- Given the choice, the vast majority (three quarters) prefer the first consultation/ initial interview to take place at the driving school's premises before registration.

- A clear majority of two-thirds of 21-25 year-olds prefer to have their first consultation in person at the driving school.

- Among younger respondents aged 16-18, the proportion is even higher at 82%.

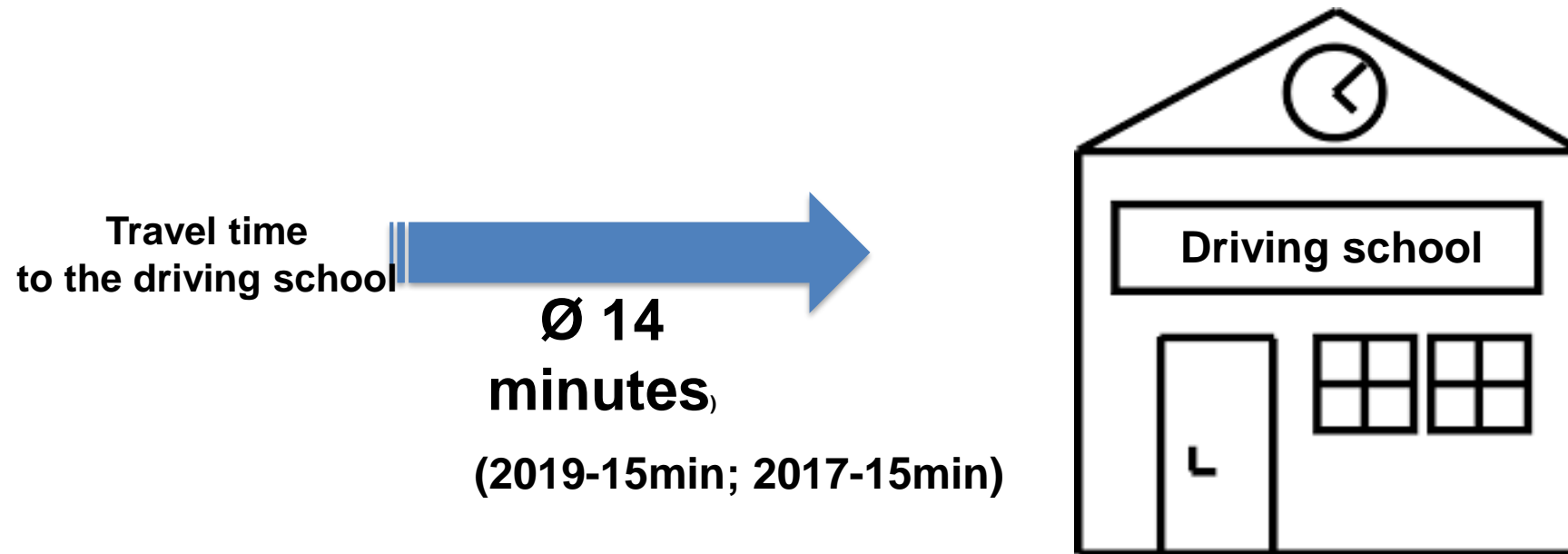
- As a tendency, 62% of the participants who had theory lessons exclusively online (completed by distance) still prefer an on-site counselling interview.

- Only 21% of the "pure online theory teaching users" prefer the first conversation via Webex, Zoom etc.

Distance to the driving school: On average, it takes 14 minutes from the place of residence / training.

Status Quo - How to get to the driving school (from home/work)

Average travel time from home to driving school / theory lessons?



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