



International Road Safety Association e. V.

INDUSTRY REPORT

DRIVING SCHOOL 2023

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Driving School 2023

**MOVING International Road
Safety Association e. V.**

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FORWORD



Jörg-Michael Satz

President MOVING

Forword

For the fourth time since 2016, MOVING has taken a close look at the driving school industry and produced the Industry Report 2023. Like its predecessor, this report is still under the influence of the corona pandemic. Especially in 2021, Covid-19 still had a major impact on sales, but in the meantime, the driving schools have mastered the crisis and have generally come through the difficult period well. The outlook for the future is characterised by optimism and the turnover expectations are predominantly positive. The topics of digitalisation and distance theory instruction have clearly gained momentum. It has become clear that an overwhelming majority of driving instructors, but also of learner drivers, prefer face-to-face instruction. The main reason for this is the significantly better quality of on-site training, as the interaction between teachers and students is much better. MOVING is by no means against digitalisation and is in favour of integrating blended learning into lessons in order to deepen the content taught. While Covid-19 seems to have been overcome, the shortage of driving instructors remains a problem and is the biggest challenge for the industry. Training periods are lengthening and driving licence costs are rising, with high inflation also a major cost driver. However, the staff vacancy ensures that driving instructors' salaries are rising. And this is happening faster than the average for all other professions. This makes the profession more attractive, so that after years of decline, the number of driving instructors is slowly increasing again. It is encouraging that the proportion of women in this profession is gradually increasing.

Note: In accordance with standard industry practice, we have refrained from using the same masculine and feminine forms of speech in this industry report. This is done for reasons of better readability and is intended to improve comprehensibility. We emphasise: All personal terms apply equally to all genders.

FORWARD

The age structure in the driving instructor sector proves how important it is to have new and young driving instructors. It is foreseeable that more and more driving instructors will retire in the next few years and will therefore either look for a successor or close their driving school altogether. The number of driving schools is therefore continuing to decline, and small driving schools in particular are having problems finding a suitable successor. The trend here is clearly towards larger driving schools, so that the structure of the industry is changing and will continue to change.

The number of driving tests has stabilised again after Corona and is currently at a record level. This can also be said about the pass rates, but in a negative sense. Especially in the area of the category B driving licence test, the rate is strongly declining, this applies to both the theoretical and the practical test. For the theoretical test in particular, it would therefore make sense for learner drivers to take a compulsory preliminary test and only be admitted when they have the necessary theoretical knowledge. The driving instructors support this idea.

The driving school industry has to deal intensively with the issues of sustainability and the environment. The EU's „Green Deal“ stipulates that greenhouse gas emissions must be reduced by 90 percent by 2050. The transport sector plays a major role here, which is why driving schools should increasingly focus on e-cars. The use of driving simulators is also good for the environment, but also for the training of learner drivers. Above all, however, driving instructors should sensitise their students to environmentally conscious driving.

I hope you enjoy reading



Jörg-Michael Satz

President MOVING
International Road Safety Association e. V.

GREETING



Kirsten Bürger-Faigle
Head of Unit Road Traffic Law
Federal Ministry for Digital
Affairs and Transport

Greeting

The first MOVING Industry Report on the situation of driving schools was published in 2016. With the Industry Report 2023, the MOVING International Road Safety Association e. V. now provides information on the current situation of the driving school industry in Germany for the fourth time. The framework conditions outlined by the President of the MOVING International Road Safety Association in his welcoming address at the first MOVING Industry Report 2016 have not only stabilised, but also continued to develop very dynamically. Thus, not only the European Union, but also road safety work in Germany continues to strive to increase road safety and reduce the number of road fatalities through measures in the various fields of action. The European Commission's road safety package presented on 1 March 2023 should also be seen in this context. It has made proposals on how to improve the cross-border exchange of information in the case of violations of road traffic regulations and how to revoke driving licences in the case of particularly serious traffic offences. This should once again contribute to halving the number of road deaths by 2030.

The central core of the road safety package is the proposal for a 4th driving licence directive, with which the EU Commission also aims to modernise the EU-wide harmonised traffic regulations and has its sights particularly set on young drivers and novice drivers. To this end, it has borrowed some regulations already in force in Germany. This applies, for example, to accompanied driving at the age of 17. The European Commission has found that the system for driving licences of category B in Germany has had a very positive effect on road safety. The proposal also puts a stronger focus on risk awareness and danger perception. The testing of young drivers and novice drivers is now to extend to the interaction between a motor vehicle and particularly vulnerable road users such as pedestrians and cyclists as well as users of e-scooters and e-bikes, for example. With the cinematic driving tasks in the theory test, which help learner drivers to familiarise themselves with traffic situations, Germany is also already at the forefront here.

GREETING

The challenges for the driving school sector identified in the 2016 sector report (technological advances, demographic developments in Germany, growing demands on climate and environmental protection) remain unchanged after seven years. In addition, there are changes in the mobility behaviour of citizens brought about by new innovative mobility offers, traffic growth, the guarantee of affordable mobility and increasing demands on energy efficiency. The task of coping with these challenges in a constantly changing mobility society is very demanding for all those involved. The Federal Ministry of Transport, Building and Urban Affairs (BMDV) is aware of the importance of driving instructors for the preservation of individual mobility in Germany, especially in rural regions where public transport can often only be used to a limited extent. However, it is also undoubted that the driving school sector is in a constant state of change and is once again facing major challenges (digitalisation, electromobility, driver assistance systems/automated driving). Driving schools will still be needed in the future, but possibly in a new guise and with changed tasks and requirements. In this context, the optimisation of learner driver training (OFSA II) and, in particular, the digitalisation of driving instruction should be mentioned. The modern further development will only succeed in good professional cooperation and transparent professional exchange of information and opinions of all relevant actors. Only in this way can ideas be developed together and new impulses be set. In this sense, I look forward to a good cooperation!

Good and proven traditions should be continued. I therefore wish the MOVING industry report a numerous and growing readership and many more informative issues that provide interesting and valuable insights into the driving school market and its developments.

Kirsten Bürger-Faigle
Head of Unit Road Traffic Law
Driving instructor/professional driver qualification law
Federal Ministry for Digital Affairs and Transport

SUMMARY

Summary

The driving school industry is optimistic about the future. The corona pandemic has been overcome and the turnover expectations of most driving schools for 2023 are encouraging. Although the number of taxable driving schools is continuously decreasing, the industry turnover continues to develop upwards. The share of smaller driving schools is decreasing, the average turnover is increasing, as the current figures make clear. In 2020, only just under 36 percent of driving schools had an annual turnover of less than 100,000 euros. 55.5 percent achieved an annual turnover of between 100,000 and 500,000 euros. Almost 84 percent of all driving schools are organised as sole proprietorships.

The fact that the number of registered driving licence holders up to the age of 74 is on the rise again is encouraging. However, further efforts must be made to tackle the shortage of driving instructors. Converted to all driving licence classes, there was a total shortage of 11,787 driving instructors in January 2023. At the same time, the average age has risen to 54.2 years and the proportion of over 60-year-olds is 37.4 percent. On a positive note, however, the proportion of young women is increasing. Especially in the metropolises of Hamburg and Berlin, female driving instructors are breaking into the former male domain. A positive consequence of the shortage of driving instructors is the nationwide increase in salaries, which makes the profession more attractive.

The vehicle fleet of the driving schools has not yet changed fundamentally. On average, 6.5 cars and 6.6 motorbikes are used for all A classes, as well as 2.6 trucks. While leasing is the preferred form of financing for passenger cars, motorbikes are mostly owned by the driving schools. Electric vehicles will become increasingly important in the future and their share is already growing.

In 2022, approximately 70 per cent of the annual turnover was accounted for by the costs of the driving schools, with personnel costs accounting for between 30 and 40 per cent of the largest item. The increased turnover is not reflected in higher profits. On the contrary, from 2020 to 2022, the share of profit fell by a few percent.

An important topic is theory instruction, because for a long time distance theory instruction was the only way to convey theoretical knowledge due to Corona. In the meantime, driving schools have returned to face-to-face lessons, and this is welcomed not only by 96 percent of driving instructors, but also by the majority of learner drivers.

The demand for driving licence training is roughly back at the pre-Corona level. Already in 2021, the numbers in category B recovered and this trend continued in 2022. Motorbike and truck driving licences were also in high demand. However, the pass rate developed negatively, falling from just under 62.3 per cent in 2019 to only just under 62.3 per cent in 2022. 59 percent in 2022.

Rising costs due to inflation and higher salaries mean that the price of a Class B driving licence has also gone up significantly. Within three years, the average price has risen from 2,091 euros to 2,772 euros at the beginning of 2023. An average practical driving lesson now costs 58 euros. There are both regional and structural differences, because in small driving schools in rural areas, the driving licence is cheaper than in a large driving school in a big city.

PROFILE OF THE SECTOR

Profile of the sector

Current turnover incl. Flight school	Ø Turnover per Company
2,378 Bn Euro	231,504 Euro

Number of taxable Companies		Change in percent
2017	2020	
11,062	10,273	- 7.1 %

Driving Instructor 2022	
Number of registered driving license holders up to 74 years	45,954
Average age	54,4 years
Proportion over 60-year-olds	37.4 %
Proportion of women	12.0 %
„Note holder“	17.6 %

Forecast for average staff per driving school in 2022 (persons)	
Driving school owner	1
Employed driving instructors	2.4
Socially insured employed	1.8
Or marginally employed	0.6
Office staff and others	1.3
Totally driving school staff	4.7

Labour market	
Driving instructors subject to social insurance	75.4 %
Marginally employed driving instructors	24.6 %
Vacancy period* 2021	293 days
Bottleneck ratio** 2021	2,2
Media salary 2021	3,227 €

Driving school vehicles	per company	Industry projection (basis 10.500 driving schools)
Car	6.5	~ 65,000
Motorbike	6.6	~ 66,000
Truck	2.6	~ 26,000
Total	15.2	~ 157,000

Car driving training data (class B)	
Average duration of the driving training	~ 5.5 month
Number of driving hours until examination maturity	~ 33 hours
Kilometres travelled per driving lesson	~ 25 km
Carried out practical car initial tests together (First issue)	~ 1.1 million
Total kilometres travelled	~ 920 million km

Driving school industry personnel	2018	2021	Forecast 2023
Owner	~ 11,000	~ 9,760	~ 9,700
Employee driving instructors total ***	~ 18,000	~ 20,600	~ 21,500
Of which socially insured employed	~ 12,200	~ 15,500	~ 16,500
Or minor employed	~ 5,800	~ 5,000	~ 5,000
Office staff and other	~ 7,700	~ 11,200	~ 12,500
Industry personnel total	~ 36,900	~ 42,500	~ 43,700

Legend

Size	
Small driving schools	less than 100,000 euros annual turnover
Mediumsize	100,000 to 250,000 euros
Large size	250,000 to 500,000 euros
Very large size	over 500,000 euros

Area

Rural area	up to 5,000 inhabitants
Small town	up to 20,000 inhabitants
Medium city	up to 100,000 inhabitants
Large city	over 100,000 inhabitants

Region

North	Hamburg, Schleswig-Holstein, Lower Saxony, Bremen
South	Bavaria, Baden-Württemberg
West	North Rhine-Westphalia, Rhineland-Palatinate, Hesse, Saarland
East	Brandenburg, Saxony, Mecklenburg-Western Pomerania, Berlin, Saxony-Anhalt, Thuringia

* Period between advertisement and filling of a driving instructor position

** Ratio of vacancies to driving instructors registered as unemployed

*** new calculation basis

**** Figures from 2021

General information on the 2023 industry report

Since 2012, the VAT statistics have recorded the economic sectors of taxable driving and flying schools as a unit. Flying schools make up around five percent of the statistics. For reasons of readability, this fact is not mentioned consecutively - in the following, only driving schools are referred to. The coronavirus pandemic has had an impact on the results of various surveys. In individual cases, we refer to the so-called corona effect.

CONTENTS

Foreword.....	2
Greeting.....	4
Summary.....	6
Profile of the sector.....	7
Table of contents.....	8
Introduction.....	10
General industry data.....	11
Company data.....	13
Company data by size class.....	15
Costs and profit.....	20
Consumer prices.....	22
Legal form.....	25
Staff.....	27
Driving instructor shortage.....	37
Subsidies from the Federal Employment Agency.....	40
Succession situation of driving schools.....	45
Demand.....	47
Driving lessons and licence prices.....	50
Learner driver training.....	54

CONTENTS

Theory classes	57
OFSA II.....	63
Pass rate of the driving test.....	65
Impact of the corona pandemic.....	69
Guest article by Marc-Philipp Waschke.....	70
BF 17.....	73
Learner driver satisfaction.....	76
Learner driver survey.....	79
Driving instructor training.....	83
Drivingsimulators.....	84
Vehicle fleet.....	87
Guest article by Mathias Rüdell.....	90
15th Amendment to the Driving Licence Ordinance	92
Directive 206/126/EG.....	94
Guest article by Antonio Avenso.....	95
Sustainability and the environment.....	98
New business fields.....	101
Future prospects.....	102
About MOVING.....	108

INTRODUCTION

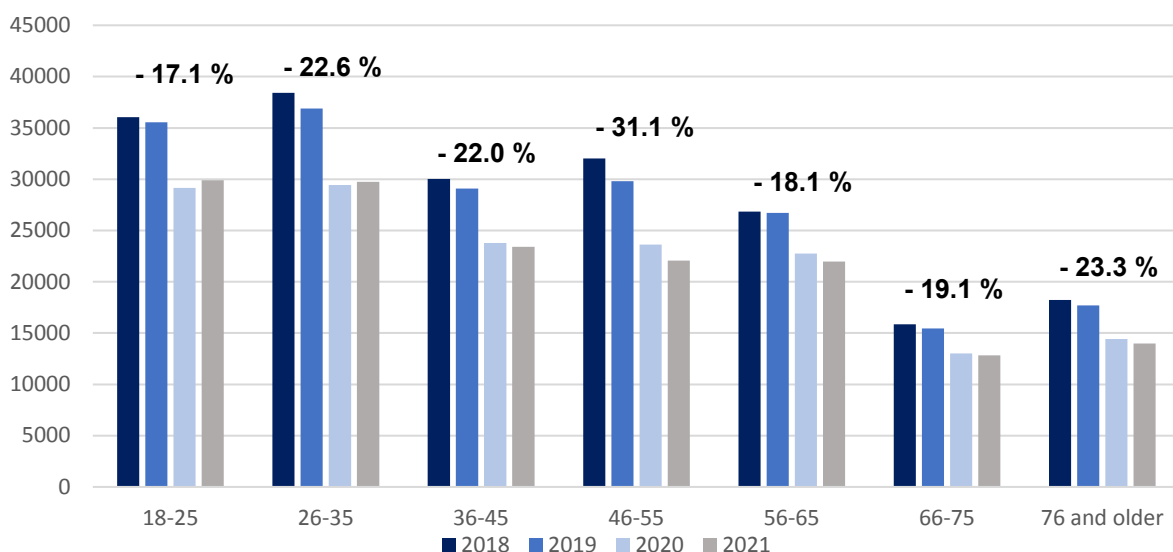
Introduction

Driving schools in Germany make a significant contribution to road safety and ensure that the number of accidents continues to fall. The current statistics of the main causes of accidents involving passenger cars confirm this trend, although Corona also played a part in the fact that there were significantly fewer accidents, especially in 2020 and 2021. The number of traffic fatalities reached an all-time low of 2,562 in 2021. Whereas until a few years ago it was the 18- to 25-year-olds who were responsible for the most accidents, this has gradually shifted, as novice drivers are starting their driving training later and later, and accordingly the risk of accidents has shifted somewhat to the 26- to 35-year-old age group. Overall, however, the trend is moving in the right direction, because while there were 36,052 accidents involving 18- to 25-year-olds in 2018, the number is 17.1 percent lower in 2021 and amounts to 29,900 accidents. For 26- to 35-year-olds, the number of accidents fell from 38,430 (2018) to 29,750 (2021) and thus by 22.6 percent.

In the corona year 2020, there was a significant decrease in accidents, so that from this low level in 2021, the accident figures in the age groups of 18 to 35 years increased slightly. Nevertheless, the number of car drivers aged 35 and over continued to fall. The biggest leap was made by the 46-55 age group, which was able to reduce its accident figures by 31.1 percent from 2018 to 2021. Even road users over 75 years of age, who are generally considered a risk group, caused around 23.3 percent fewer accidents from 2018 to 2021.

The pedelec or e-bike is becoming an increasingly important means of transport. According to the Federal Statistical Office, 17,045 people were involved in accidents in 2021, eight times more than in 2014. A similar development can be found in the number of fatalities: 131 people were killed on an e-bike in 2021, compared to 39 women, men and children in 2014. On the other hand, the number of people killed in accidents on a non-motorised bicycle increased by around twelve percent from 2014 to 2021 to 67,080 road users decreased.

Main causes of passenger car accidents with personal injury, 2018 to 2021



Source: Federal Statistical Office, Wiesbaden, 2022, accident statistics 2018 to 2021

GENERAL INDUSTRY DATA

General industry data

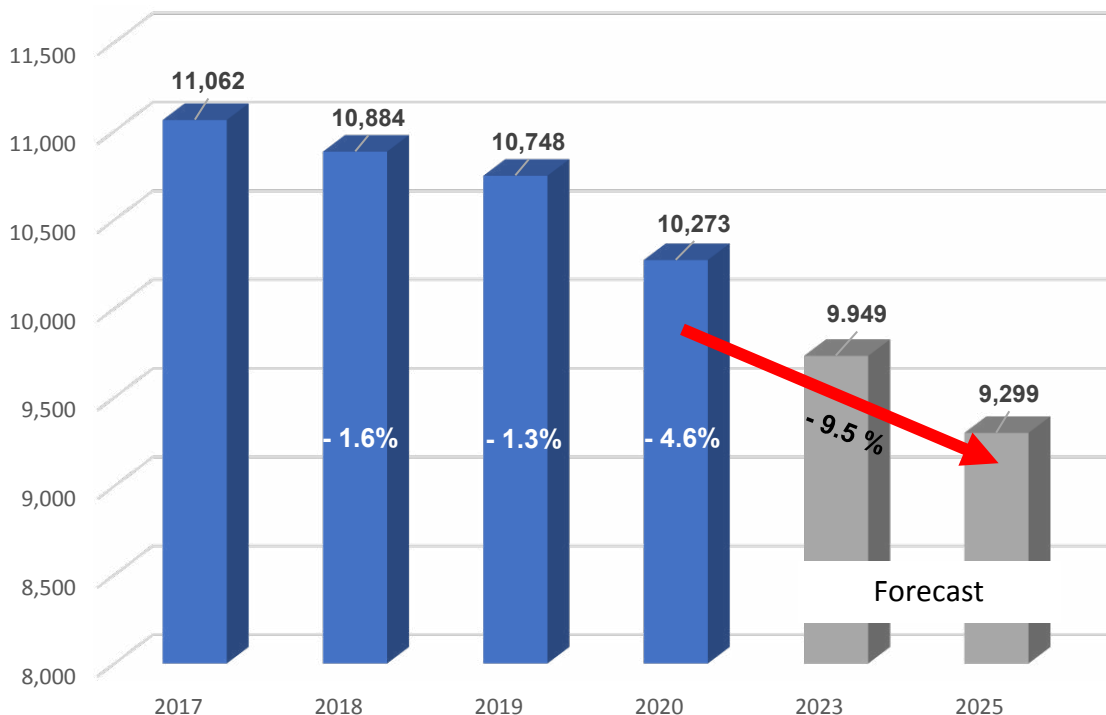
The trend that has already manifested itself over the past years will continue in 2020. According to the turnover tax statistics, the number of taxable driving and flying schools continues to decline. Compared to 2017, the number has fallen by 789 driving schools, a decrease of around seven percent. The slump from 2019 to 2020 is particularly dramatic, as 475 driving schools (-4.6 %) were closed. Since 2012, the figures have also included the flight schools active in Germany, whose share is estimated by MOVING at around five percent. Due to the marginal influence, the flight schools are neglected in the further course of the report.

HARDFACTS

- » Industry turnover has continued to increase.
- » The number of companies, on the other hand, has decreased.
- » The share of smaller driving schools is continuously decreasing.

Number of taxable driving and flying schools, 2017 to 2020 plus forecast

(MOVING estimates that the share of flight schools is around five per cent)



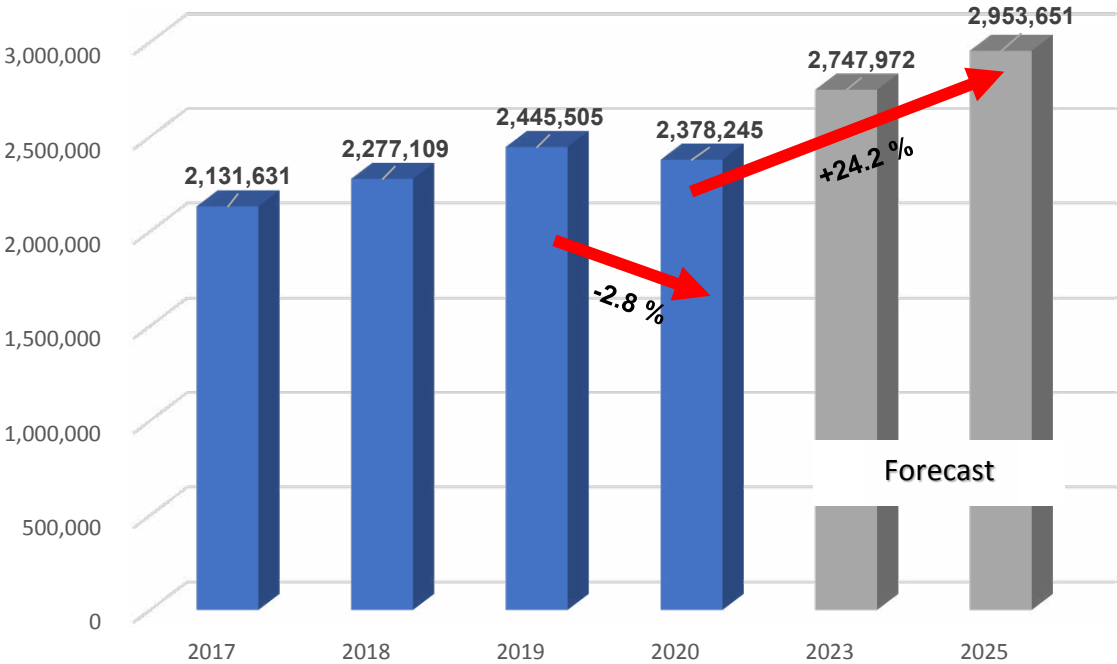
Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020, driving and flying schools and own calculation

GENERAL INDUSTRY DATA

Another observation is the trend towards larger driving schools opening branches. The figures on main and branch offices are explained in more detail later (p. 106). The forecasts up to 2025 show that the number of driving schools will continue to decline by about 9.5 percent to 9,299. The Corona effects are also evident when looking at the overall turnover of the industry, as from 2019 to 2020, the number of driving schools fell by

around by around 2.8 percent to 2.378 million euros. This is actually only a slip, because overall turnover is increasing and has grown by 246 million euros (+11.6 %) from 2017 to 2020. In 2022, turnover amounted to 2,449 billion euros, according to MOVING's estimate. MOVING assumes that the positive trend will continue and expects industry turnover to be just under three billion euros in 2025.

Development of the sector turnover of the driving and flight schools, 2017 to 2020 plus forecast, in 1,000 euros (in 1,000 euros)



Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020, driving and flying schools and own calculation

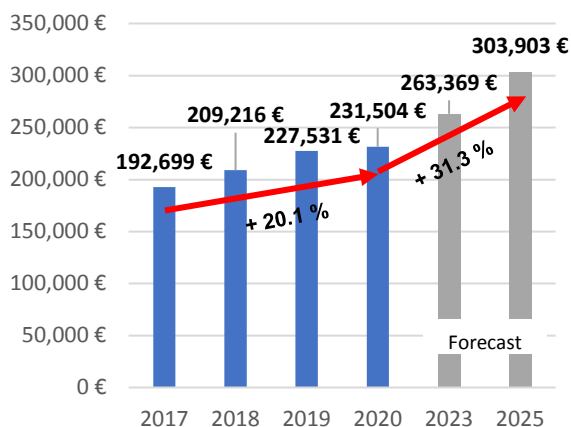
COMPANY DATA

HARDFACTS

- » The average turnover of taxable driving and flying schools has continued to grow.
- » There are regional differences
- » Driving schools in Hamburg achieve the highest turnover per company in Germany.

The average turnover per driving school in 2020 was 231,504 euros. Although the year was marked by Corona and many driving lessons could not be completed as expected, there was still an increase in turnover of 3,973 euros (+1.74%) compared to the previous year. This shows that, contrary to expectations, driving schools have come through the crisis relatively well. Overall, the turnover per driving school in Germany increased by 20.1 percent (+ 38,805 euros) from 2017 to 2020. MOVING forecasts further growth in turnover for the coming years and expects an average annual turnover per driving school in Germany of 303,903 euros (+ 31.3 %) for 2025.

Average turnover per driving and flying school, 2017 to 2020 plus forecast



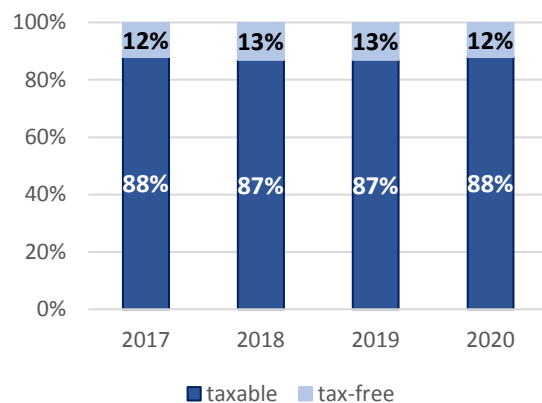
Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020 and own calculation

This would make up for the somewhat flattened increase caused by the Corona year, so that the driving schools can look quite optimistically into the future.

However, a look at the average taxable annual turnover per driving school in the different federal states shows strong regional differences. While driving schools in the metropolitan area of Hamburg have an annual turnover of 361,139 euros, this is only 156,093 euros in Mecklenburg-Western Pomerania, and things don't look much better in Saxony-Anhalt (157,281 euros) and Saxony (158,401 euros). The latter are thus clearly below the national average. The east-west divide can be clearly seen here, with Hamburg being an absolute outlier on the upside and almost 90,000 euros above second-placed Baden-Württemberg.

There are few changes in the share of taxable and tax-free turnover of driving schools. There have been hardly any shifts here between 2017 and 2020. The share of taxable driving schools has increased by only one percent to 88 percent in 2020.

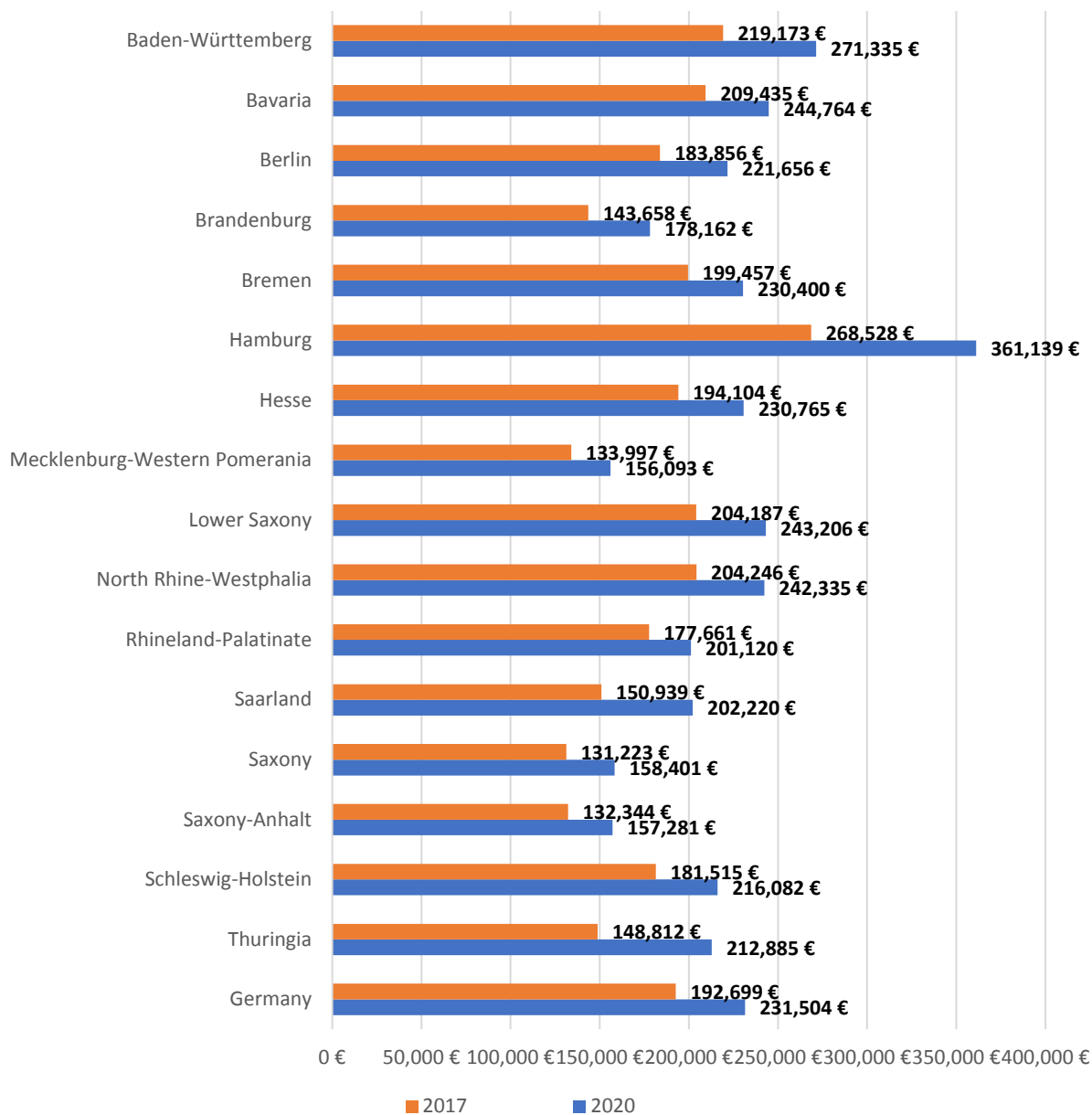
Share of tax-exempt and Taxable turnover, 2017 to 2020



Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020 and own calculation

COMPANY DATA

Average turnover of driving and flying schools by federal state, comparison 2017 with 2020



Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020 and own calculation

COMPANY DATA ACCORDING TO TURNOVER SIZE CLASSES

HARDFACTS

- » The highest density of large driving schools is in Hamburg.
- » Medium-sized driving schools represent the largest turnover size class in 2020.
- » Smaller driving schools continue to lose market share.

Data according to turnover size classes

Companies with smaller turnover are continuously losing market share. In 2017, 15 percent of all driving schools generated annual sales of between 17,500 and 50,000 euros, but in 2020 this share has fallen to eleven percent. This is also due to the fact that their number has decreased by 30.3 percent from 1,666 to 1,161 since 2017. If we include the driving schools, which until 100,000 turnover, this was still 43 per cent in terms of pure numbers in 2017, but the trend continues to point downwards, with only 36

per cent of all driving schools in Germany in 2020. This has a corresponding impact on the share of turnover, which is now only 9.7 per cent for driving schools up to 100,000 euros, whereas in 2017 it was still around 15 per cent. This means that there are clear shifts in the overall market towards ever larger units. The MOVING forecasts for 2025 are also clear here and indicate that only 25 percent of all driving schools will then be in this turnover size category.

The heart of the industry, however, still beats in the segment between 100,000 and 500,000 euros annual turnover. Their share of total turnover is 52.3 percent and the share of driving schools is 45.5 percent. MOVING expects 62 percent of driving schools to be in these turnover ranges by 2025. But the market share of the large driving schools is also growing. Companies with a turnover of between half a million and one million euros generate 18.4 percent of the total turnover, and driving schools with more than one million euros, which is only 2.2 percent, generate 19.6 percent of the total turnover of the industry. Further growth is forecast.

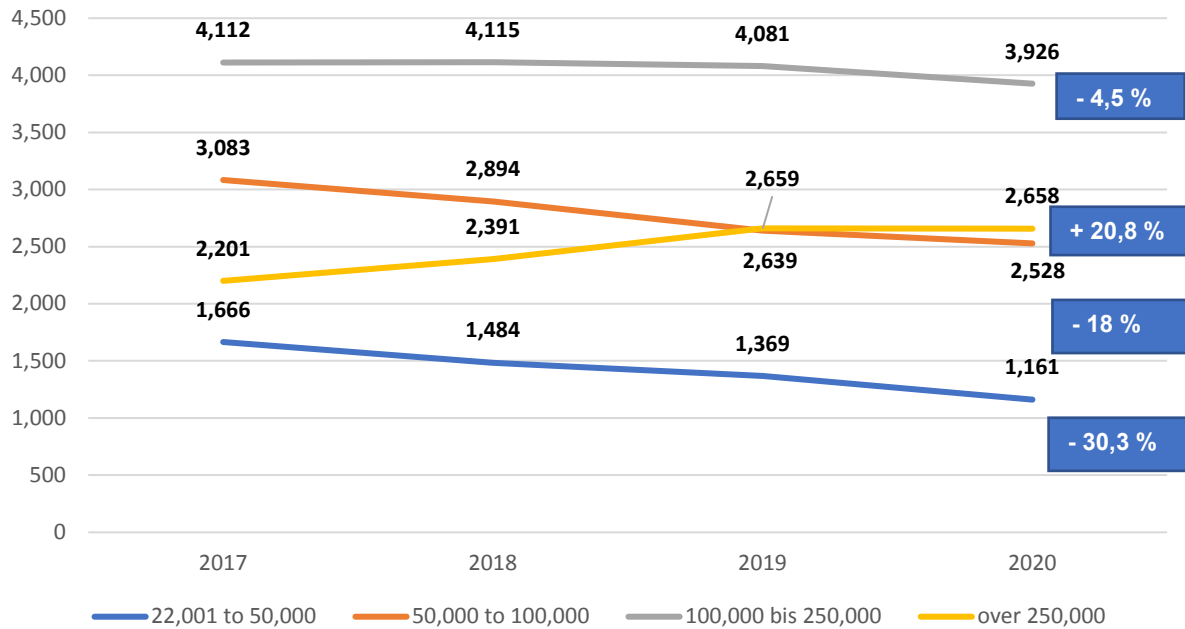
Number of driving school companies by turnover size class 2020

Size classes according to turnover in €	Number of taxable driving schools	Turnover in 1.000 euros	Share of the quantity	Share of turnover
über 22,001 – 50,000	1,161	42,424	11.3 %	1.8 %
50,000 – 100,000	2,528	188,844	24.6 %	7.9 %
100,000 – 250,000	3,926	629,118	38.2 %	26.5 %
250,000 – 500,000	1,782	612,707	17.3 %	25.8 %
500.000 – 1 million	648	438,592	6.3 %	18.4 %
1m – 2m	175	233,228	1.7 %	9.8 %
over 2m	53	233,333	0.5 %	9.8 %
Total	10,273	2,378,246	100 %	100 %

Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020 and own calculation

COMPANY DATA ACCORDING TO TURNOVER SIZE CLASSES

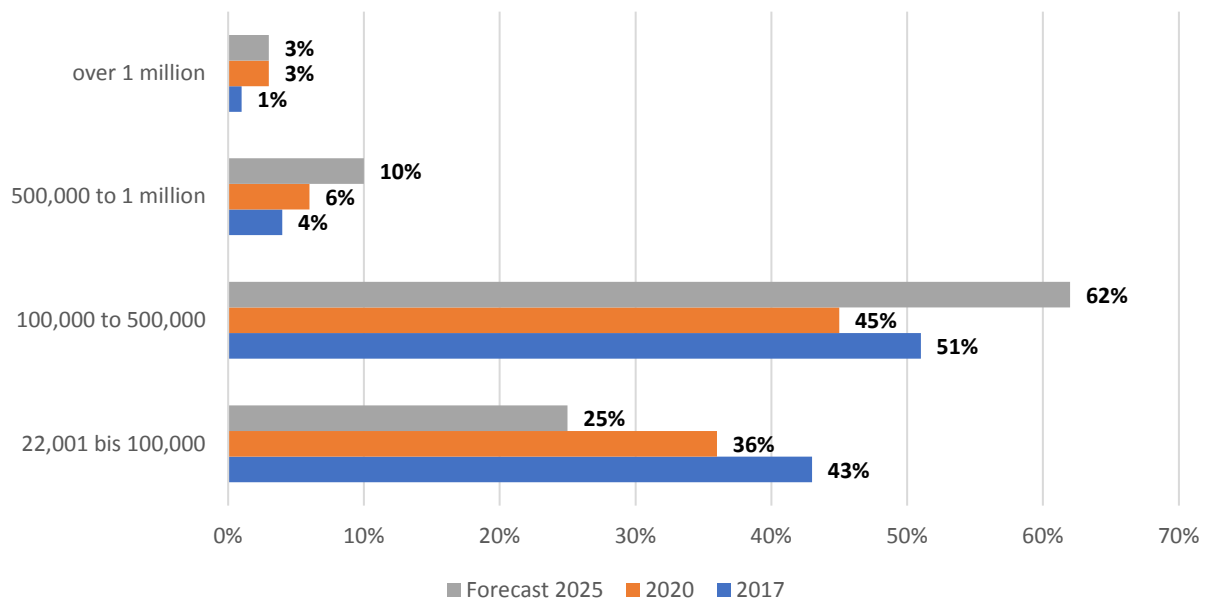
Development of taxable driving schools by size, 2017 to 2020



Source: Federal Statistical Office, Wiesbaden, 2022, VAT statistics 2020 and own calculation. 2017 to 2019, the lowest bracket was between 17,500 and 50,000 euros

Market division of the taxable

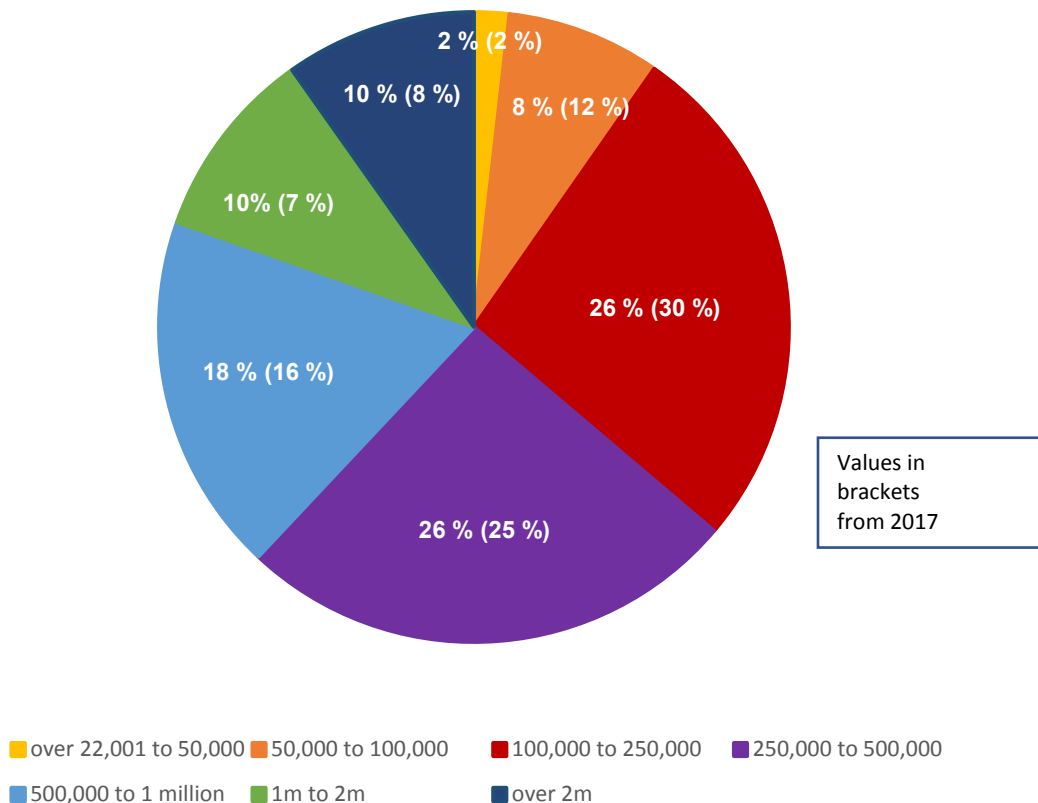
Driving schools by turnover size class, 2017 to 2020, plus forecast



Source: Federal Statistical Office, Wiesbaden, 2022, VAT statistics 2020 and own calculation. In 2017, the lowest bracket was between 17,500 and 50,000 euros

COMPANY DATA ACCORDING TO TURNOVER SIZE CLASSES

Market shares by turnover 2020



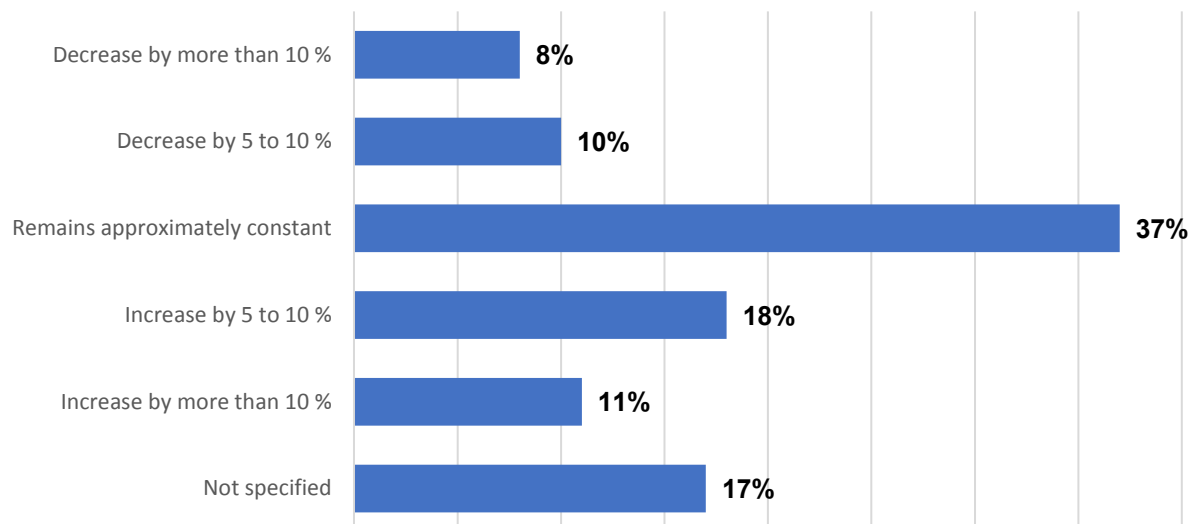
Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020 and own calculation

The driving school industry is quite optimistic about the future and the majority expects turnover to increase in the next two years. Eleven percent expect an improvement of more than ten percent. Optimism is only marginally higher in the old federal states (17 percent) than in the new federal states (16 percent). 18 percent foresee an increase of five to ten percent. A constant turnover is expected by 37 percent. The differences between east and west are relatively small. The size of the driving school also leads to only small differences. Thus, 31 percent of the very large driving schools expect an increase of at least five percent, and 29 percent of the small driving schools also see it that way.

Among the small driving schools, 46 percent do not expect any major change and anticipate stability. The optimism is well-founded, because the first half of 2022 was successful for most driving schools and brought good turnover. The Corona crisis has been overcome well and the demand from learner drivers has risen again. Thus, 66 percent of the driving schools surveyed by MOVING assessed the turnover from the second half of 2022 as (very) satisfactory. The turnover expectations for 2023 are also positive, as 33 percent expect a further increase, 40 percent constant turnover and only 18 percent a decline (MOVING Driving School Market, 2023_1).

COMPANY DATA ACCORDING TO TURNOVER SIZE CLASSES

Turnover expectation for the next two years



Source: MOVING Driving School Market, 2023_1

The shares of companies by turnover size class vary greatly between the different federal states. According to the Federal Statistical Office, the most taxable driving and flying schools are in North Rhine-Westphalia, the most populous federal state, with 2,068. However, Bavaria with 1,719, Baden-Wuerttemberg with 1,719 and 1,374 and in Lower Saxony with 1,019 driving schools, the figures are in four figures. In Hamburg, there are only 151 driving schools, but 40 percent of them have a turnover of over 250,000 euros per year. That is the highest figure in Germany. The situation is probably similar in other large cities such as Munich or Berlin. If you include businesses with a turnover of 100,000 euros or more, this figure rises to 73 per cent. This is even topped by Bremen with 79 per cent, 49 per cent of which are in the 100,000 to 250,000 euro segment.

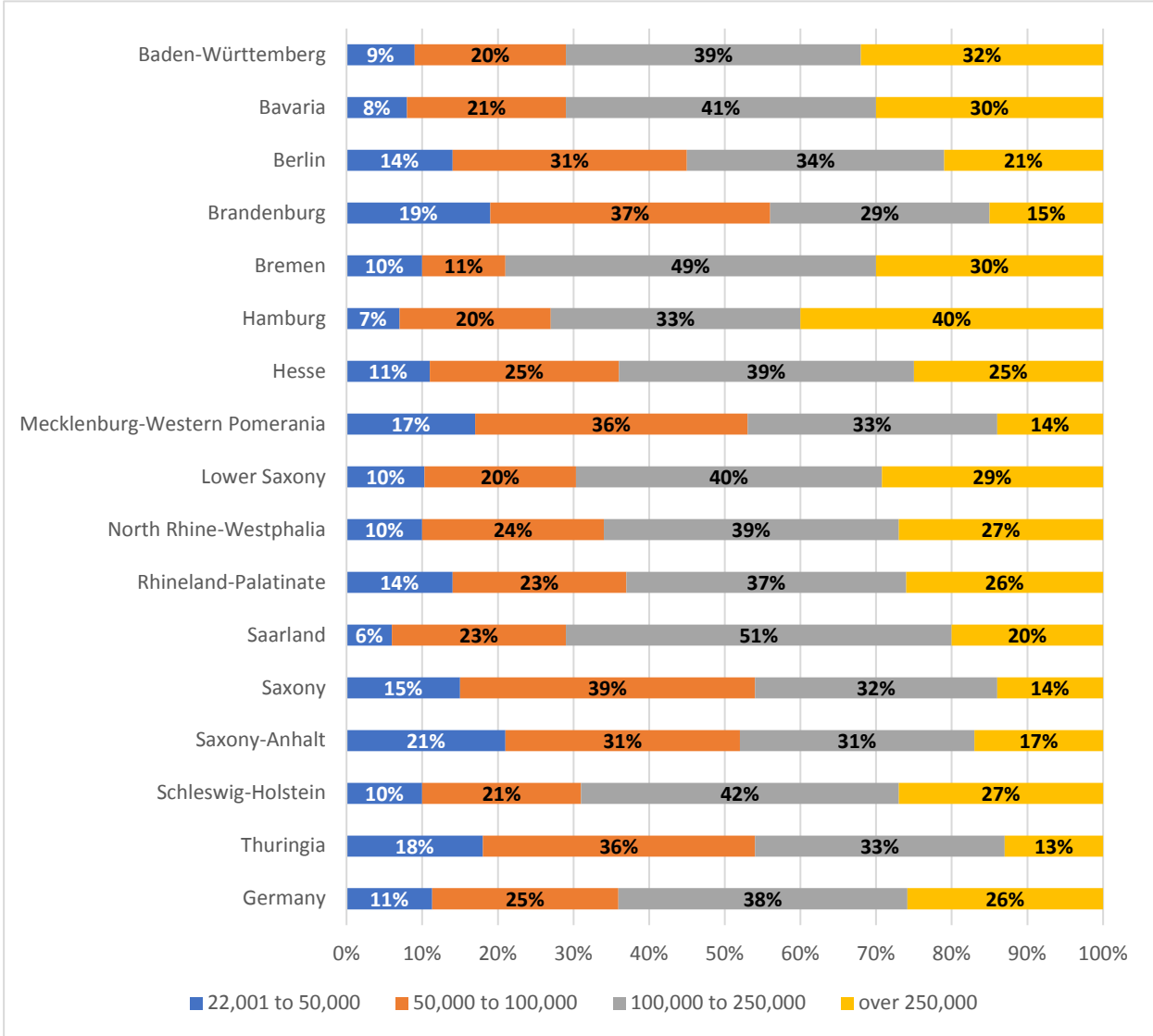
Across Germany, people are now reaching 64 percent of all driving schools have a turnover of more than 100,000 euros per year. The fewest driving schools with a

annual turnover of more than 250,000 euros can be found in the new federal states. Saxony and Thuringia each have 13 percent, Mecklenburg-Vorpommern 14 percent, Brandenburg 15 percent and Saxony-Anhalt 17 percent. Conversely, most small driving schools are also active here, with a turnover of between 22,001 and 50,000 euros. At 20 percent, Saxony-Anhalt has the largest share here, just ahead of Brandenburg with 19 percent and Thuringia with 18 percent. The fewest small driving schools can be found in Hamburg (7 %) and Bavaria (8 %). In Germany, the proportion of small driving schools is eleven percent.

The MOVING forecast for 2025 shows a continuation of the trend towards ever larger driving schools. The number of small driving schools under 100,000 euros will continue to decline. Almost two thirds of the driving schools will achieve a n annual turnover of between 100,000 and 500,000 euros, and the market share of driving schools with a turnover of more than 500,000 euros will roughly double by 2025 compared to 2017 and will be a r o u n d 13 percent.

COMPANY DATA ACCORDING TO TURNOVER SIZE CLASSES

Shares of companies by turnover class per federal state 2020



Source: Federal Statistical Office, Wiesbaden, 2022, turnover tax statistics 2020 and own calculation

COSTS AND PROFIT

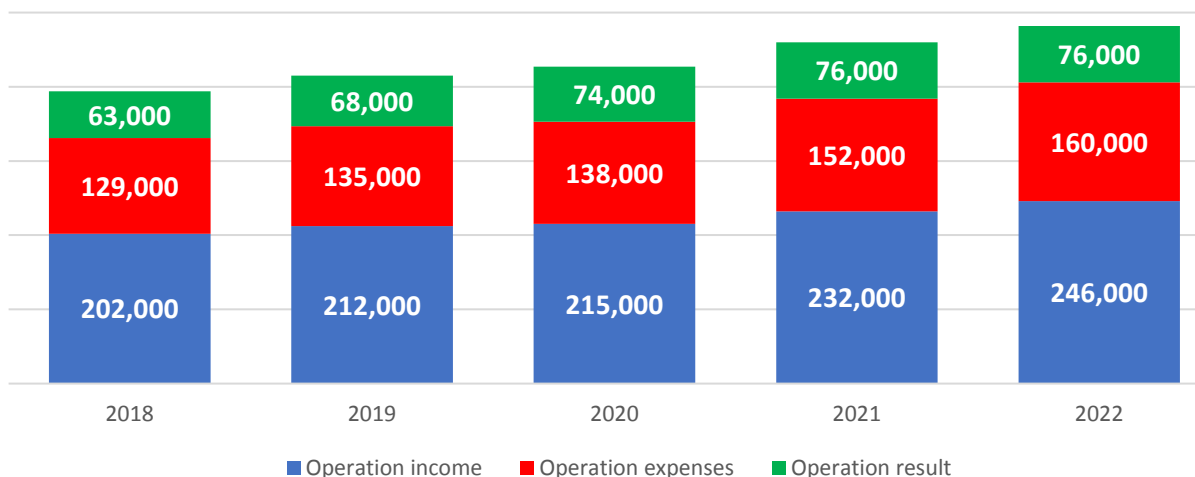
Costs and profit

While the total turnover of the driving school sector continues to rise, the increase in profit over the past two years has been rather small. While the increase from 2018 to 2020 was still around 20 percent, this fell to a few percent from 2020 to 2022. According to MOVING's calculations, in 2022 a driving school will have an average profit of between 70,000 and 80,000 euros. In the past two years, the total operating income has grown by 10 to 15 per cent to about 250,000 euros, but since the costs have increased by a little more than 15 per cent in the same period, the increase in profit has been reduced.

HARDFACTS

- » Personnel costs are rising much faster than profits
- » The share of profit in the overall result decreases.
- » Vehicle costs have risen by 30 per cent in the last two years.

Development of operating income and expenses and operating result, 2018 to 2022



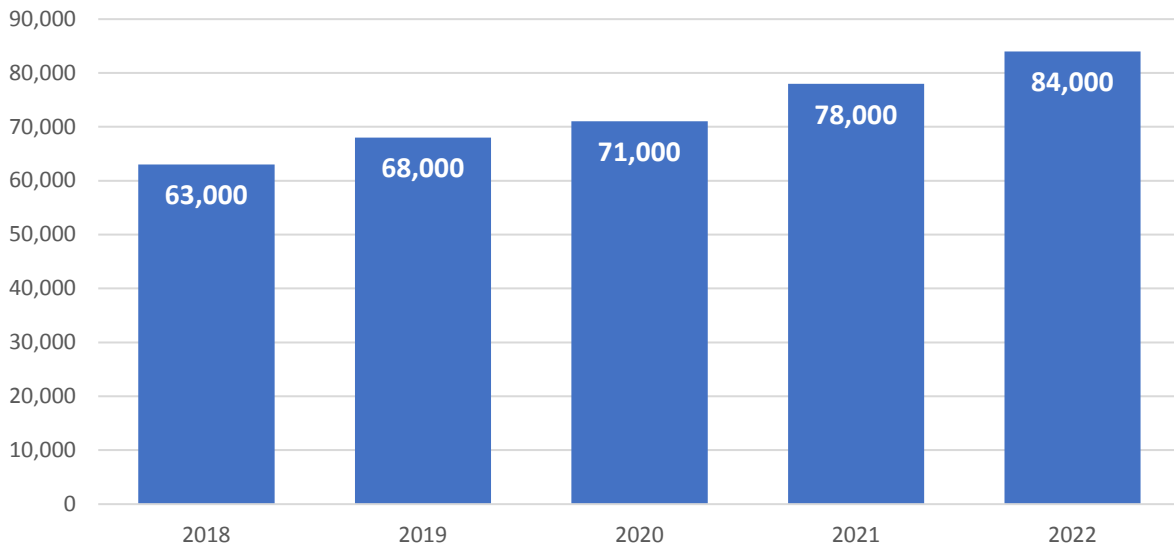
Source: MOVING, own calculations, 2023

Personnel costs in particular have exploded in recent years. While in 2018 between 60,000 and around 65,000 euros were spent on personnel on average, in 2022 the sum was between 80,000 and 85,000 euros and thus around 30 percent higher. From 2020 to 2022 alone, the increase was around 20 per cent.

This is of course related to the increased salaries for driving instructors, as the shortage of driving instructors is forcing driving schools to make the profession more attractive by offering higher salaries (see chapter on personnel). According to MOVING forecasts, this trend will continue in the coming years.

COSTS AND PROFIT

Development of personnel costs, 2018 to 2022

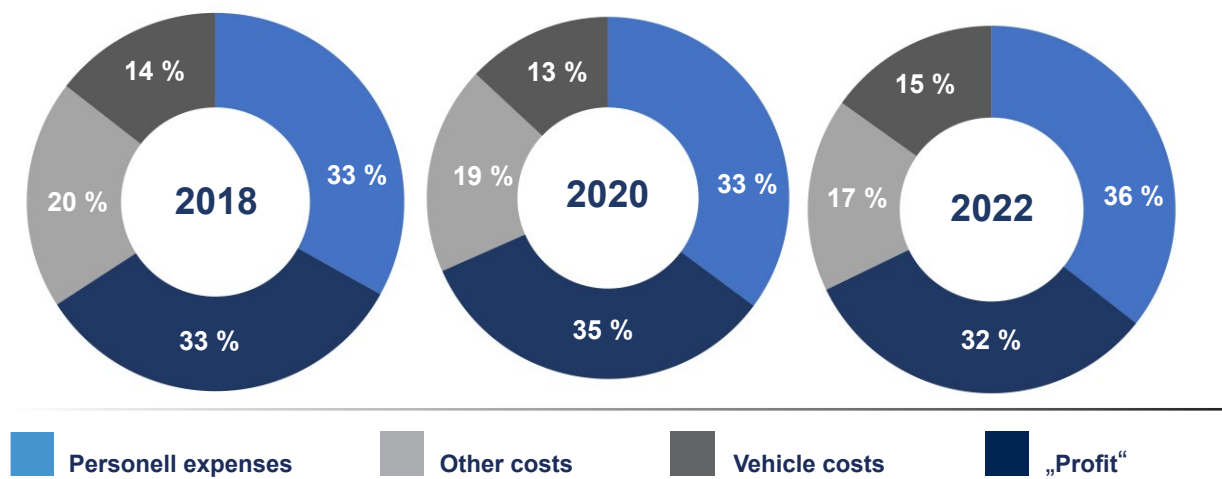


Source: MOVING, own calculations, 2023

Furthermore, the higher prices for vehicles also have a significant impact. From 2020 to 2022, driving schools spent on average around 30 percent more. While in 2020 it was still between 25,000 and 30,000 euros, it is currently between 35,000 and 40,000 euros that have been invested in the acquisition of driving school vehicles. The increased

Costs also have an impact on the overall balance sheet, because in 2020 profit was still around 35 percent of turnover, in 2022 only around 32 percent. Personnel expenses amounted to around 35% in 2022 (in 2020 it was still around 33%). However, personnel expenses and profit differ with regard to the legal form of the „company“.

Average breakdown of annual turnover, 2018 to 2022



Source: MOVING, own calculations, 2023

CONSUMER PRICES

Consumer prices

The world is living in difficult times. The Corona crisis was followed by Russia's attack on Ukraine in 2022. All this has a major impact on life and costs in all areas. Inflation has jumped into double figures, and prices in the energy sector in particular have risen to unprecedented dimensions, hitting driving schools with full force. This development can be seen in detail in the current figures from the consumer price index of the Federal Statistical Office. This shows many areas that are of particular relevance to driving schools and clearly illustrates the effects this has on the cost structure. A significant indicator is the motorist price index, which has risen by 20 per cent compared to 2019, but especially in 2022 by 12.6 percent compared to the previous year.

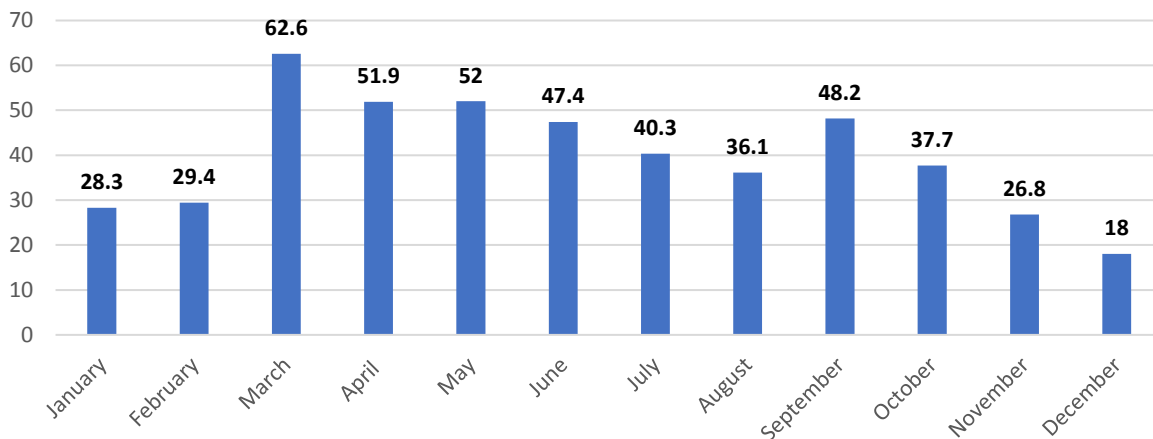
The breakdown shows where drivers and driving schools will be hit particularly hard. First and foremost, of course, is the cost of fuel, which has become 26.8 percent more expensive in 2022 alone. Since many driving schools rely on diesel vehicles, the increase of 39.6 percent compared to the previous year is particularly painful. The biggest difference was in March, when the price was 62.6 per cent higher than the previous year. Only the price of LPG rose more sharply, which in

HARDFACTS

- » Consumer prices increased by 7.9 percent in 2022.
- » The motor vehicle price index even increased by 12.6 percent.
- » The highest price increase in 2022 were for fuel. Diesel in particular became 39.6 percent more expensive.

relation to 2019 was increased by 68.2 percent and to the previous year by 42.9 percent. The cost increases run through all segments that are important for driving schools. The price of new cars rose by 5.7 percent in 2022, and that of used cars by as much as 21.2 percent. Here, an empty market ensures that demand is significantly greater than supply. The framework costs for repairs and inspections have also risen by 18.1 percent compared to 2019 (by 8.6 percent in 2022). Of course, all this is also reflected in the costs for driving school and driving licence fees, which have increased by 30.8 percent from 2019 to 2022 - by 11.4 percent in 2022 alone. The price increases for motor vehicle insurance and motor vehicle taxes remained very moderate, amounting to only 1.2 percent over four years.

Motorist Price Index 2022 / Change in percent from previous year



Source: Federal Statistical Office, Wiesbaden, 2023

CONSUMER PRICES

Consumer Price Index 2022 / Relevant data for driving schools

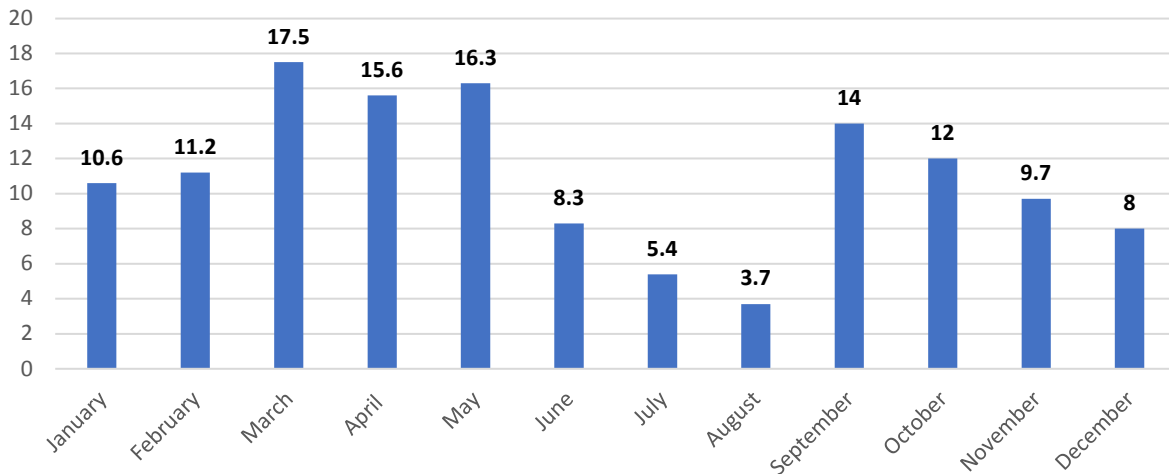
	Total consumer price index	Motorist price index	Motor vehicle new	Motor vehicle used	Motorbikes
2022 compared to 2019 (2022 to 2021)	+ 11.7 % (+ 7.9 %)	+ 20.0 % (+ 12.6 %)	+ 11.7 % (+ 5.7 %)	+ 25.2 % (+ 21.2 %)	+ 9.4 % (+ 4.5 %)
	Spare parts, accessoires, care products	Fuels total	Diesel	Super petrol	LPG
2022 compared to 2019 (2022 to 2021)	+ 9.2 % (7.2 %)	+ 40.1 % (+26.8 %)	+ 54.2 % (+ 39.6 %)	+ 34.4 % (+ 21.8 %)	+ 68.2 % (+ 42.9 %)
	Repair, inspection and parking fees and the like	Garage rent and pitch	Driving school and driving license fees	Motor vehicle insurance	Motor vehicle tax
2022 compared to 2019 (2022 to 2021)	+ 18.1 % (+ 8.6 %)	+ 3.4 % (+ 1.1 %)	+ 30.8 % (+11.4 %)	+ 2.9 % (+ 1.9 %)	+ 1.2 % (+ 0.5 %)

Source: Federal Statistical Office, Wiesbaden, 2023

Due to the tense situation, it is also worth taking a look at the overall consumer price index in 2022, which averaged 7.9% higher than in the previous year and recorded the highest increase in October at 10.4%.

There are also differences between the individual federal states, with Bremen recording the highest figure with an increase of 9.5%, while Saarland saw comparatively moderate increases of 7.0 percent.

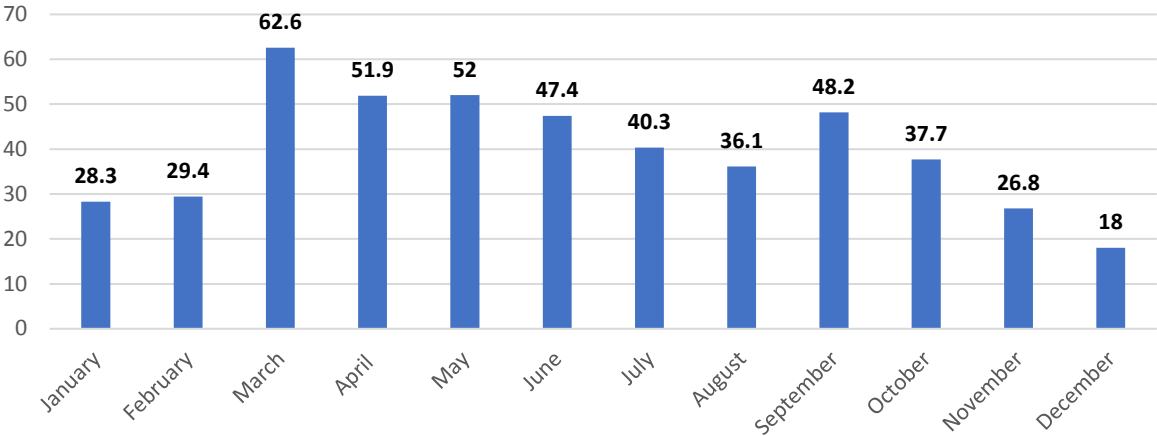
Consumer Price Index 2022 / Change in percent from previous year



Source: Federal Statistical Office, Wiesbaden, 2023

CONSUMER PRICES

Consumer prices for diesel 2022 / Change in percent compared to previous year



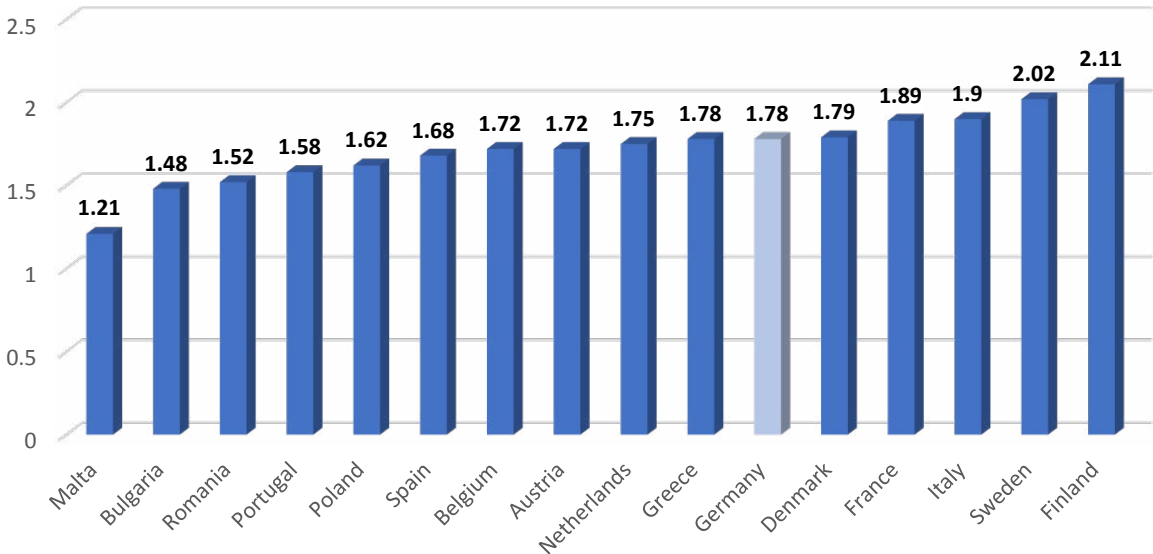
Source: Federal Statistical Office, Wiesbaden, 2023

Diesel prices in Europe in 2023

Germany is not alone in Europe with the problems of inflation, as all countries are struggling with rising costs. This is also reflected in the comparison of the prices for a litre of diesel fuel, which varies greatly from country to country. Malta, as an outlier with a price of 1.21 euros, is certainly not representative.

The direct neighbours have similar prices to Germany, which averaged 1.78 euros as of 6 February 2023. Austria (1.72), the Netherlands (1.75) and Denmark (1.79) are at a comparable level. France (1.89) and Italy (1.90) are above the prices in Germany, and it is particularly expensive in Scandinavia, as Sweden charges 2.02 and Finland 2.11 euros per litre. However, the price of diesel recovered towards the summer.

Consumer prices for diesel in Europe / as of 6 February 2023



Source: Federal Statistical Office, Wiesbaden, 2023

LEGAL FORM

Legal form

The legal form of a company should be chosen correctly, because it is decisive for the tax and legal treatment and thus also for liability issues. For this reason, everyone should weigh up all the advantages and disadvantages of the various company forms when setting up a company in order to be able to make the best decision for themselves. A distinction is made in the legal forms between sole proprietorships, partnerships, public corporations and limited companies. Among driving schools, sole proprietorships are traditionally the most represented with 83.9 percent, followed by corporations with 12.3 percent.

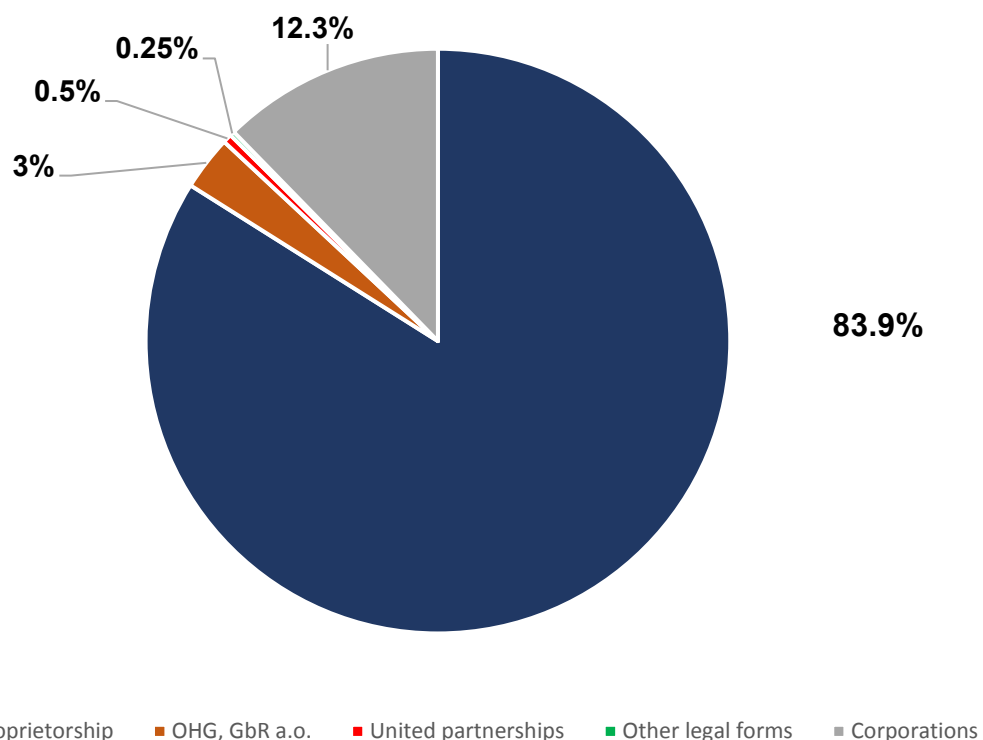
Compared to 2018, the individual companies increased their turnover by 11.3

HARDFACTS

- » 83,9 percent of all driving schools are organised as sole proprietorships.
- » The individual companies generate 70 percent of the industry's turnover.
- » Limited partnerships and other legal forms are losing turnover.

percent and thus achieved the highest percentage gain. The average turnover per sole proprietorship in 2020 is 192,973 euros. The general partnerships (9.8 %) and the joint-stock companies (5.6 %) also recorded gains. On the other hand, limited partnerships (-9.5 %) and other legal forms (-20 %) suffered losses.

Share of driving school companies by legal form 2020



Source: Federal Statistical Office, Wiesbaden, 2022, VAT statistics 2020

LEGAL FORM

Overall, the driving school sector recorded a 10.7 percent increase in turnover. The individual companies also have the largest share of the total turnover of the sector. At 1,663 billion euros, they account for exactly 70 percent of the total, with a slight downward trend, as the share was still 70.4 percent in 2018. On the other hand, corporations are continuing to advance, achieving a share of 22.1 percent (21.5 %) with 525 million euros.

Partnerships reach 106 million euros and thus 4.5 percent and limited partnerships 74.5 million euros, which corresponds to 3.1 percent of the total turnover. It is noticeable here that the average turnover per company in the limited partnerships has fallen from 1,582,702 euros to 1,432,538 euros. Overall, the average turnover per company increased from 209,216 euros to 231,505 euros.

Turnover per legal form / comparison 2018 to 2020

	2018				2020				
	Number	Turnover in 1000 euros	Share of turnover of the industry	Turnover per company in €	Number	Turnover in 1000 euros	Share of turnover of the industry	Turnover per company in €	Change turnover per company
Individual companies	9,253	1,603,998	70.4 %	173,349	8,622	1,663,816	70.0 %	192,973	11.3 %
Partnership	310	97,502	4.3 %	314,523	308	106,364	4.5 %	345,338	9.8 %
Limited partnership	47	74,387	3.3 %	1,582,702	52	74,492	3.1 %	1,432,538	-9.5 %
AG, KgaA, GmbH	1,245	489,334	21.5 %	393,039	1,265	525,046	22.1 %	415,056	5.6 %
Other legal form	29	11,887	0.5 %	409,897	26	8,529	0.4 %	328,038	-20.0 %
Together	10,844	2,277,109	100 %	209,216	10,273	2,378,247	100 %	231,505	10.7 %

Source: Federal Statistical Office, Wiesbaden, 2022, VAT statistics 2020

PERSONNEL

Staff

Based on the current MOVING survey from January 2023, there are currently an average of 4.7 employees per driving school. Of these, 4.2 are permanently employed driving instructors and 0.5 are freelancers. The number of people with driving licences up to the age of 74 has recovered somewhat and is now rising again moderately after years of decline. In 2022, 45,954 people will hold a driving instructor's licence. That is four percent more than in 2018, but still no reason to sound the all-clear.

However, the slightly positive trend, which was already apparent in 2019, has solidified somewhat, as the number of licence holders up to the age of 74 has - as described - risen slightly again. MOVING therefore assumes that this number will continue to rise and will be well above 47,000 in 2025. However, this is not synonymous with the active number of driving instructors, because MOVING estimates that about 8,000 people - that is 17.6 percent - hold a driving instructor's licence but do not work as driving instructors at all, so that the number of active driving instructors should amount to about 38,000.

Around 32 percent of driving schools are located in rural areas with up to 10,000 inhabitants. 46 per cent are located in cities with up to 100,000 inhabitants and 23 per cent in large cities with over 100,000 inhabitants. The average age of the owners is 56.

Salaried employees and marginal part-time workers

There is a stable and encouraging trend in the driving school sector, as there are more and more employment relationships that are subject to social insurance. employment relationships.

HARDFACTS

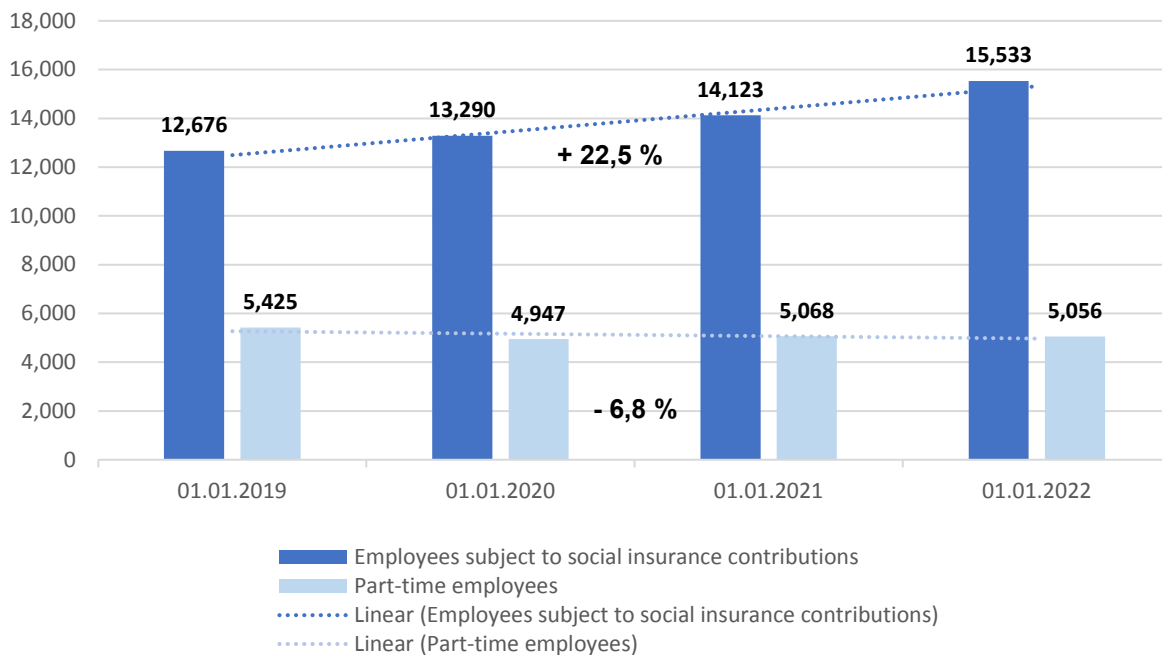
- » **More employees subject to social insurance contributions in driving schools.**
- » **The development of driving instructor salaries is very pleasing.**
- » **There are still salary differences between male and female driving instructors.**

As of 31 March 2022, there were a total of 15,533 driving instructors permanently employed by their driving schools. This is the first time the 15,000 mark has been broken. Due to a more detailed calculation by the Federal Employment Agency, the figures have changed in comparison to previous MOVING publications. In relation to 31 March 2019, the number has increased by almost 3,000 employees and thus by 22.5 percent within four years.

In addition, there were 5,056 marginal employment relationships, so that a total of 20,589 driving instructors were employed. The proportion of marginally employed persons fell by 6.8 per cent in the four-year period under review and was thus only 24.5 per cent overall. The proportion of women among employees subject to compulsory social insurance rose slightly to 18.9 per cent, and among marginal part-time employees it also rose slightly to 10.4 per cent. The figures show that in the white-collar sector, slowly but gradually, more women are being employed. In percentage terms, the increase in the number of female driving instructors subject to social insurance contributions is actually very considerable, because from 31 March 2019 (2,197) to 31 March 2022 (2,936), the number increased by 33.6 percent.

PERSONNEL

Driving instructors subject to social security contributions and marginally employed, 2019 to 2022



Source: Statistics Service of the Federal Employment Agency, Nuremberg, 2022

Age and proportion of women

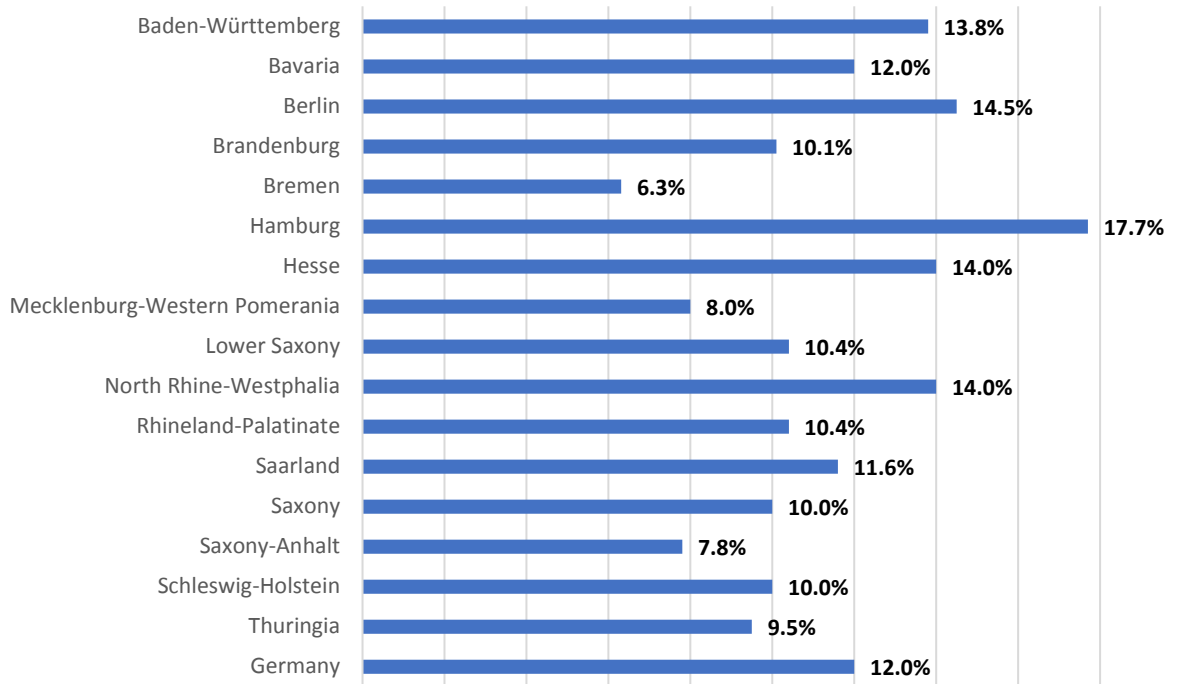
In addition to the lack of personnel, the age structure is another major problem. In 2021, the average age of driving license holders was already 54.2 years, and the trend is continuing to rise significantly. MOVING forecasts an average age of 55 for 2025. The ageing population is slowly taking on dramatic proportions, as shown by the proportion of driving instructors who are over 60 years old. From 2020 to 2021 alone, this rose from 36.1 to 37.4 percent, or 16,814 people. It is foreseeable that it will not be long before a large proportion of them go into well-deserved retirement. In Thuringia, 49.8 percent of all people with a driving instructor's license were already over 60 in 2021, and in Bremen the figure is 49 percent. This means that almost every second person here is already approaching retirement. The average age in these two federal states is correspondingly high, at 58.1 years in Thuringia and 58.2 years in Bremen.

Interestingly, the situation in the neighboring city of Hamburg is quite different, as Hamburg has the youngest average age at 49.6 years and is also in last place for the proportion of over 60-year-olds at 26.2 percent - in this case, it is positive to be at the bottom of the league. This is the highest proportion of women in the driving instructor workforce, which will be around 17.7 percent in 2022.

Even if the proportion of women is only growing slowly and is the lowest in Saxony-Anhalt at just 7.8 percent, the trend is still positive. In Germany, the proportion has increased to twelve percent in 2022, and for 2025 MOVING forecasts a proportion of women with driving instructor licenses of over 13 percent.

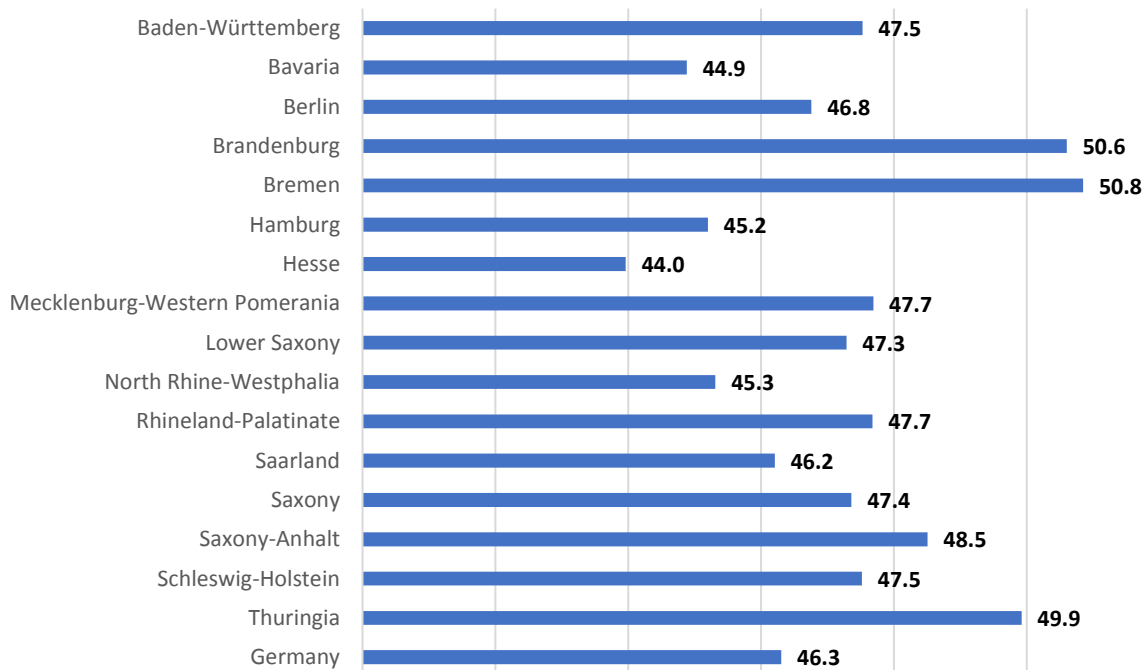
PERSONNEL

Proportion of female driving instructors in each federal state 2022



Source: Federal Motor Transport Authority, Flensburg, 2023

Average age of female driving instructors in each federal state 2021



Source: Federal Motor Transport Authority, Flensburg, 2023

PERSONNEL

The development in the number of driving instructors varies greatly from state to state. Hamburg is once again at the top here, with 18.3% more driving instructors in use from 2019 to 2022, and Berlin, another major city, also recorded an increase of 9.7%. The situation is probably similar in large cities such as Munich or Cologne, but there is no explicit data collection here. North Rhine-Westphalia is in the lead among the territorial states, as 648 more driving

instructors have been employed here in three years, which corresponds to an increase of 7.8 percent. Bremen is bucking the nationwide trend with a fall of 3.8 percent and Brandenburg (- 0.7 %).

Overall, however, the development across Germany continues to be positive, with the number of driving instructors increasing by 1,751 from 2019 to 2022, which corresponds to 4.0 per cent. MOVING expects this trend to continue in the coming years.

Persons with driving instruction licences up to the age of 74 in the federal states, 2019 to 2022

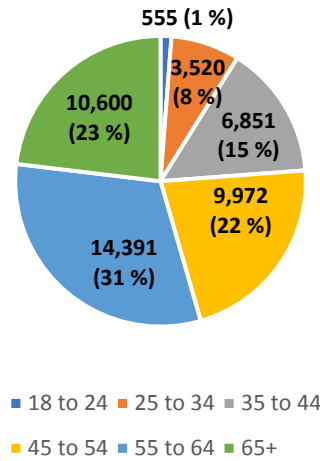
State	Driving instructor 2019	Driving instructor 2022	Change	Change in %	Proportion of women	* Share over 60	* Average age
Baden-Württemberg	4,873	4,929	+ 56	+ 1.1 %	13.8 %	37.1 %	54.3
Bavaria	8,091	8,341	+ 250	+ 3.1 %	12.0 %	36.2 %	53.6
Berlin	1,828	2,005	+ 177	+ 9.7 %	14.5 %	37.5 %	53.6
Brandenburg	1,673	1,662	- 11	- 0.7 %	10.1 %	46.5 %	57.1
Bremen	213	205	- 8	-3.8 %	6.3 %	49.0 %	58.2
Hamburg	574	679	+ 105	+ 18.3 %	17.7 %	26.2 %	49.6
Hesse	2,991	3,269	+ 278	+ 9.3 %	14.0 %	33.9 %	52.4
Mecklenburg-Western Pomerania	789	790	+ 1	+ 0.1 %	8.0 %	42.7 %	56.4
Lower Saxony	5,641	5,800	+ 159	+ 2.8 %	9.3 %	39.5 %	55.1
North Rhine-Westphalia	8,267	8,915	+ 648	+ 7.8 %	14.0 %	31.8 %	52.3
Rheinland-Pfalz	2,187	2,200	+ 13	+ 0.6 %	10.4 %	42.3 %	56.1
Saarland	631	637	+ 6	+ 0.9 %	11.6 %	43.0 %	55.8
Saxony	1,957	1,986	+ 29	+ 1.5 %	10.0 %	40.9 %	55.0
Saaxony-Anhalt	1,179	1,184	+ 5	+ 0.4 %	7.8 %	43.2 %	56.1
Schleswig-Holstein	2,009	2,040	+ 31	+ 1.5 %	10.0 %	37.7 %	55.1
Thuringia	1,300	1,312	+ 12	+ 1.0 %	9.5 %	49.8 %	58.1
Total	44,203	45,954	+ 1,751	+ 4.0 %	11.4 %	37.4 %	54.2

Source: Kraftfahrt-Bundesamt, Flensburg, 2023, * Data of the last two columns from 2021

PERSONNEL

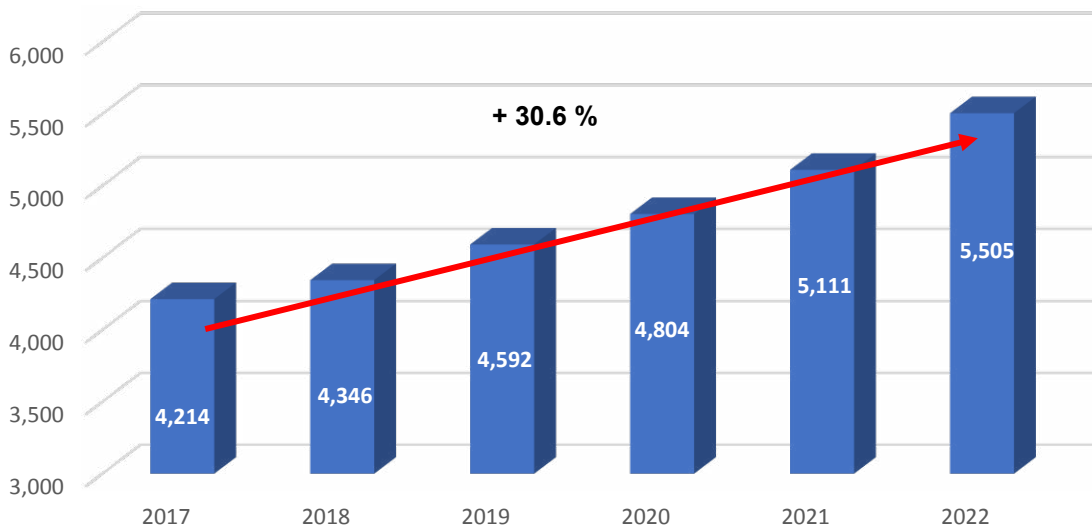
Looking at the age groups, however, there are also positive things to report, as the number of 18 to 24 year-olds with a driving licence has more than doubled within four years. In 2022, the number of 555 had a driving instructor's licence, but this is only just under one percent of the total number of driving instructors. In the age group of 25 to 34 year-olds, 3,520 held a driving instructor licence. The number of driving instructors in the 45-54 age group declined to 9,972. However, the ageing becomes clear in the next groups, which make up the largest percentage of persons with driving instructor licences. With 14,391, the 55- to 64-year-olds form the strongest group (31 %), followed by the over-65s with 10,600 driving instructors (23 %).

Age structure of driving instructors 2022



Source: Federal Motor Transport Authority, Flensburg, 2023

Number of females with driving licence up to 74 years since 2017



Source: Federal Motor Transport Authority, Flensburg, 2023

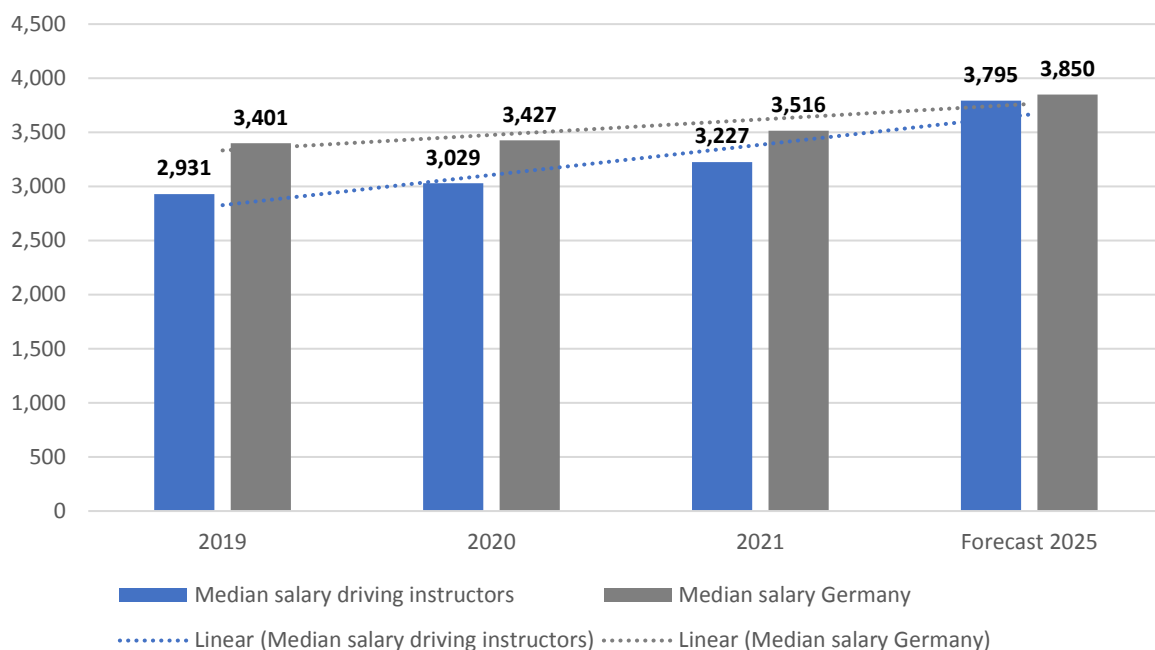
PERSONNEL

Median salary

The development of driving instructors' salaries is very positive. The percentage increase is significantly higher than the median salary of all employees in Germany, but has not yet reached the overall level. But the gap is getting smaller and smaller and the forecasts indicate that salaries are converging more and more. The reason for this positive development is mainly the shortage of drivers, because it is becoming more and more difficult to find reasonable personnel. Therefore, salaries have to become more attractive in order to attract people to the profession. The average gross salary for a driving instructor employed in a driving school was 3,227 euros per month in 2021, ten percent higher than in 2019. Nevertheless, there is still a difference of 289 euros compared to all occupational groups, which corresponds to 8.2 percent.

This difference was still 16 percent in 2019. The forecast shows that this trend will continue and that the salary of driving instructors will increase faster on average than the salary of other occupational groups. For 2025, MOVING forecasts a median salary for driving instructors of 3,795 euros, which will be only 55 euros lower in relation to all employees. The difference will then be only 1.4 percent. The regional differences are in part very considerable. According to the Federal Statistical Office, the median salary for driving instructors in western Germany was 3,309 euros in 2021, while in eastern Germany it was 2,727 euros on average. According to the BfA, Baden-Württemberg remains the front-runner in the salary comparison, while Saxony retains the red lantern. There are still salary differences between female and male driving instructors, but here too the trend shows that the so-called gender pay gap is gradually closing.

Development of the median salary for driving instructors, 2019 to 2021, plus forecast



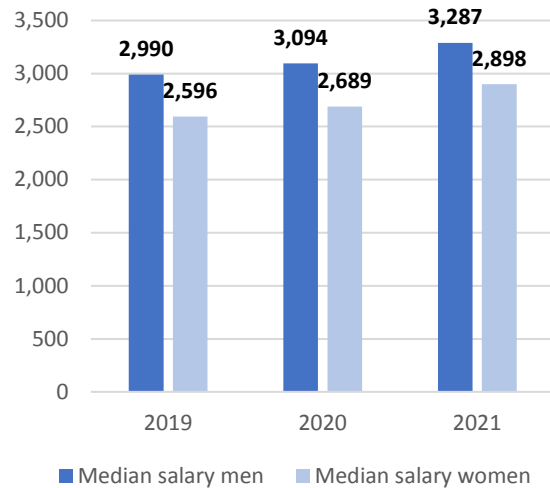
Source: Statistics Service of the Federal Employment Agency, Nuremberg, 2022

PERSONNEL

In 2019, the gap was 494 euros, which corresponds to 15.2 percent. Over 14.7 per cent, the gap has narrowed to 13.4 per cent in 2021 and thus to 389 euros. The driving schools have now recognised how important it is to make the profession more attractive for female driving instructors and have raised salaries. MOVING assumes that the difference will continue to decrease until 2025. As a result, the proportion of women in the driving instructor profession has also increased to 11.37 per cent in 2021, and here too the trend indicates that more and more women will enter this profession. Especially in Hamburg with 17.7 per cent and in Berlin with 14.5 per cent, but women are also on the rise in North Rhine-Westphalia and Hessen (14 %).

In general, the driving instructor industry is doing quite well, so most driving schools were able to raise their salaries. In the first half of 2022, nine percent increased their salaries by an average of more than ten percent, 27 percent by an average of five to ten percent and 15 percent by an average of up to five percent. Only 38 percent of the

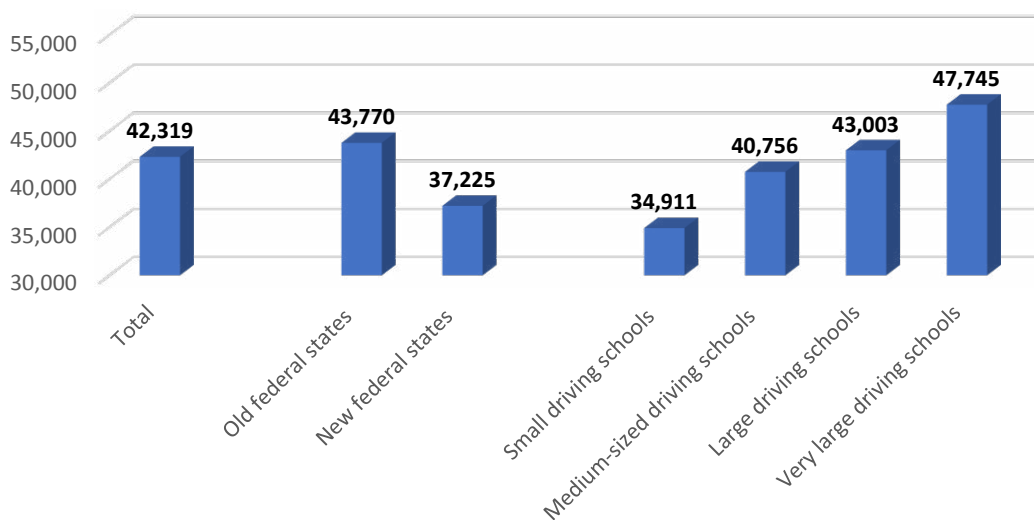
Gender pay gap, 2019 to 2021



Source: Statistics Service of the Federal Employment Agency, Nuremberg, 2022

Driving schools here have not increased their salaries. A new survey in January 2023 shows that the average gross annual salary has risen to 42,319 euros. However, there are large regional differences, and the size of the driving school also plays a not insignificant role. As a rule, the larger the driving schools, the better the income for driving instructors.

Average annual gross salary of driving instructors in euros in 2023



Source: MOVING Driving School Market, 2023_1

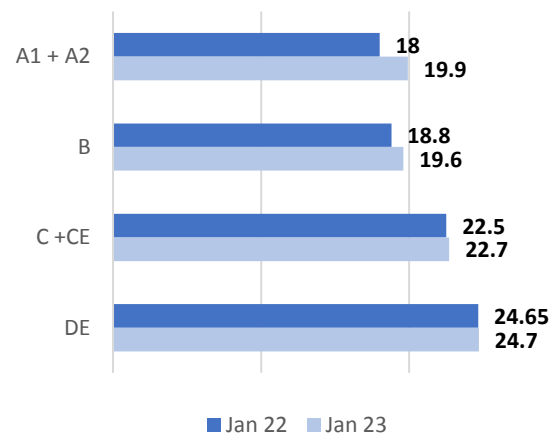
PERSONNEL

In small driving schools, the average was 34,911 euros, in medium-sized driving schools 40,756 euros and in large driving schools 43,003 euros. However, driving instructors earn the most in the very large driving schools, which pay an average of 47,745 euros. The market is assuming an increase in annual gross salaries of seven to nine percent over the next two years. This in turn will have an impact on prices for learner drivers.

The salary gap between the old and new federal states is still glaring, because while the old federal states pay an average of 43,770 euros, the new federal states are at 37,225 euros and thus lower by 6,545 euros.

MOVING determines the salaries for the 45-minute theory and practical lessons in the various driving license classes in its own semi-annual „Driving School Market“ survey. This is based on the salaries for the 45-minute lessons - both theoretical and practical. The gross salary of driving instructors in driving license class B (practical) rose moderately until January 2023 and amounted to 19.60 euros for the practical lesson, an increase of two percent, and also 19.60 euros for the theory lesson.

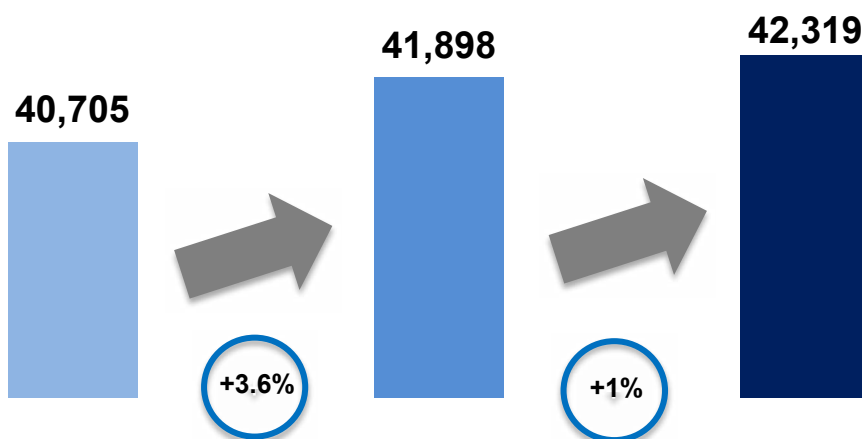
Average driving instructor salaries (practice) in the different licence classes, January 2022 and 2023



Source: MOVING Driving School Market, 2023_1

The situation is different for truck driving licenses. Although the costs here are also rising by four percent, the gross salary of driving instructors in categories C and D has remained at roughly the same level as the previous year.

Development of driving instructor salaries from January 2022 via August 2022 to January 2023



Source: MOVING Driving School Market, 2023_1

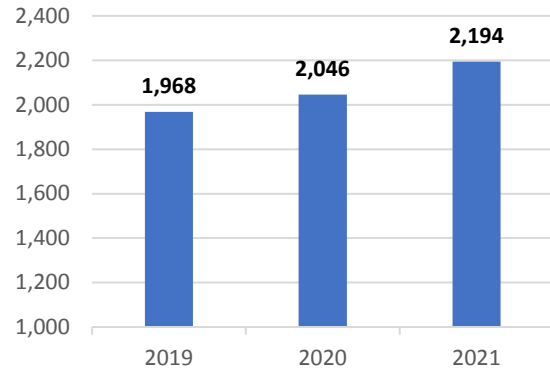
PERSONNEL

Office staff

The number of employees subject to social insurance contributions in the office sector has recovered after a brief slump in the coronavirus year 2020 and reached a high of almost 7,000 employees on March 31, 2022. Nevertheless, there is still a shortage of skilled workers here too, as twelve percent of all driving schools are still looking for office staff. The salary structure has also improved slightly here, with monthly salaries rising by 11.5% to €2,194 between 2019 and 2021.

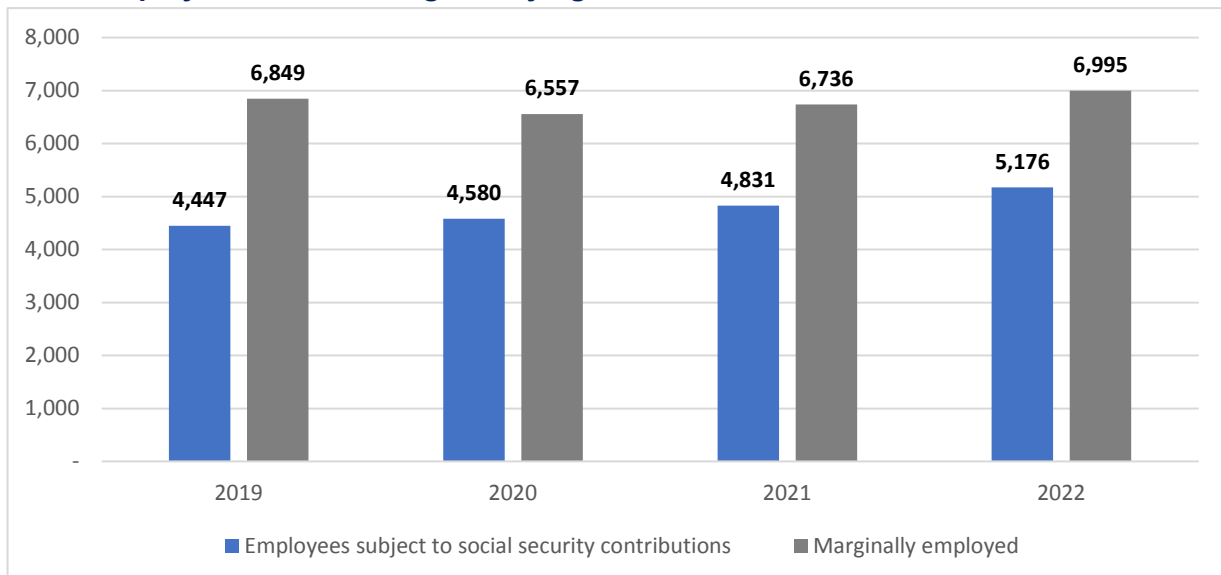
The number of employees subject to social security contributions has risen steadily. While 4,447 employees worked at driving and flight schools in 2019, this figure had risen by 16.4 % to 5,176 by 2022.

Average salary for office staff in driving and flying schools, 2019 to 2021



Source: Federal Employment Agency, Nuremberg, 2022

Number of employees subject to social security contributions and of marginal Office employees in the driving and flying schools, 2019 to 2022



Source: Federal Employment Agency, Nuremberg, 2023

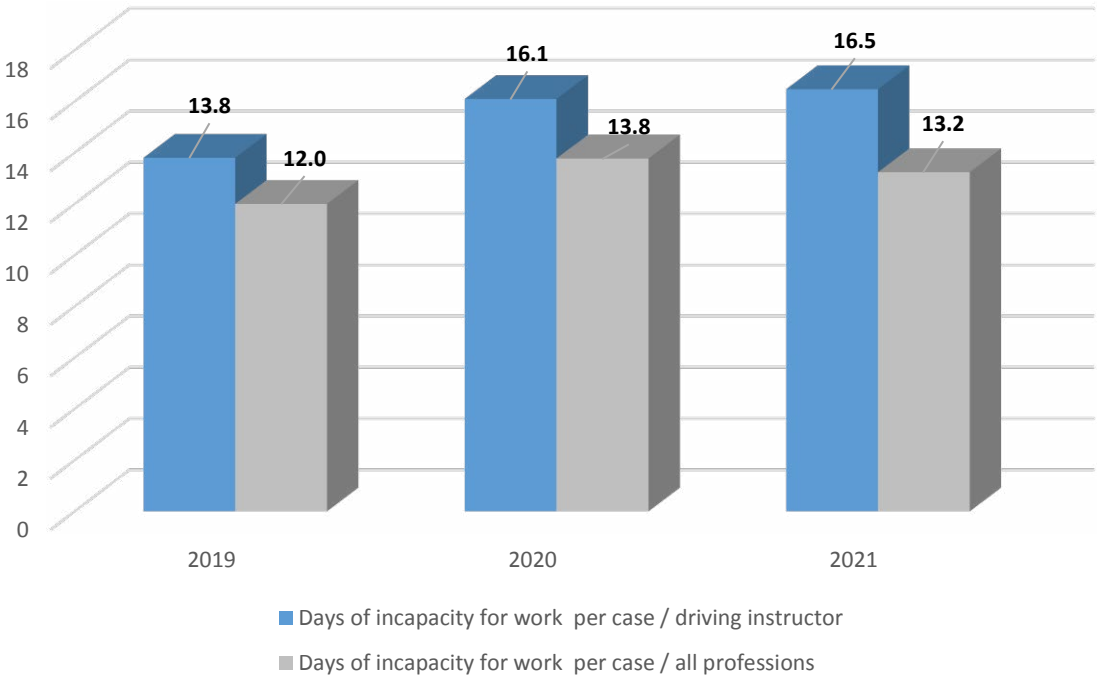
PERSONNEL

Sick leave

Although the number of cases of incapacity to work among driving instructors at the AOK health insurance fund is falling slightly, the number of days lost due to illness has increased. While there were 13.8 sick days per case in 2019, this figure rose to 16.1 days in 2020 and 16.5 days in 2021. It is quite conceivable that the coronavirus pandemic is also influencing the statistics here.

Compared to all other occupational groups, the number of sick days is still higher, having risen from 12.0 sick days in 2019 to 13.8 in 2020 and 13.2 in 2021, which is more than three sick days lower. The most common cause of sick leave was back pain, which was responsible for an average of 14.5 sick days per case. In second place were acute infections (7.5 sick days) and in third place depressive episodes (47.8 sick days).

Days of incapacity to work per 100 members, 2019 to 2021



Source: AOK, 2022

DRIVING INSTRUCTOR SHORTAGE

HARDFACTS

- » **The shortage of driving instructors is one of the biggest challenges for driving schools.**
- » **Hamburg has the youngest and the most female driving instructors.**
- » **The vacancy rate has increased significantly in recent years.**

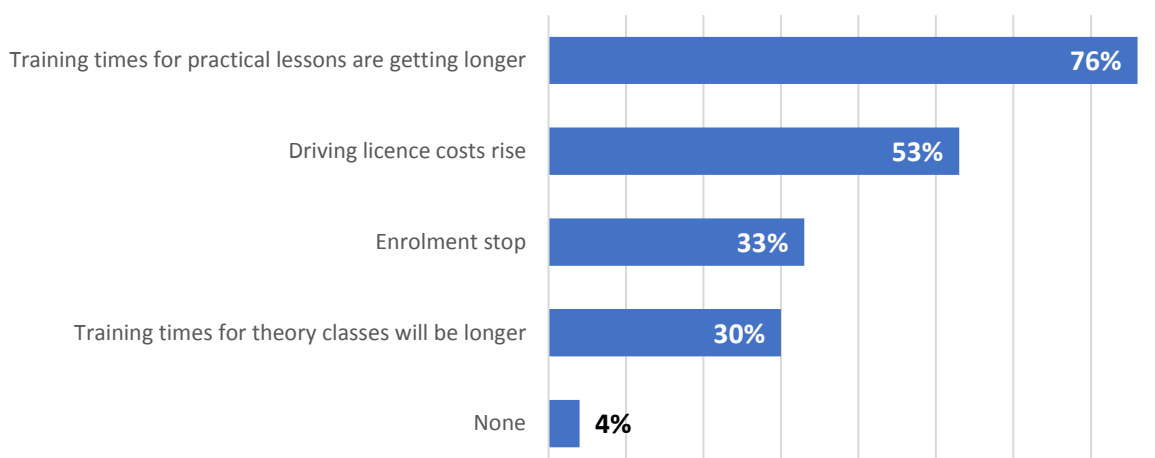
Shortage of driving instructors

There is a shortage of skilled workers in almost all sectors in Germany. The driving school industry is no different, as it is suffering greatly from a lack of suitable staff. The shortage of driving instructors meant that potential learner drivers often had to expect longer training times in 2022. 33 percent of driving schools looking for staff stopped accepting new drivers and responded to the shortage of driving instructors by stopping registrations. 76 percent pointed out that training times for practical lessons would increase, and 53 percent feared that driving license costs would rise as a result.

Only four percent of driving schools fear that the shortage of driving instructors will have no specific impact on their business.

In addition, the staff vacancy has an impact on salaries. In order to attract new driving instructors, many driving schools have significantly increased their salaries. From January 2022 to January 2023 alone, the average annual salary rose by four percent to 42,319 euros. This leads to positive effects, as since 2018 the number of people with driving licences up to the age of 74 has recovered a little and is now rising moderately again after years of decline. With 44,092 potential driving instructors, 2018 was the year with the lowest number of staff. Four years later, there are still 1,862 people and thus a good four percent more who have a driving instructor's licence. According to MOVING calculations, 3,135 new driving instructors were added between 1 January 2018 and 31 December 2021, but 2,274 also left. However, this is no reason to be optimistic, because there are still too few of them, and 83 percent of all driving schools continue to rate the shortage of driving instructors as the greatest challenge for the next few years.

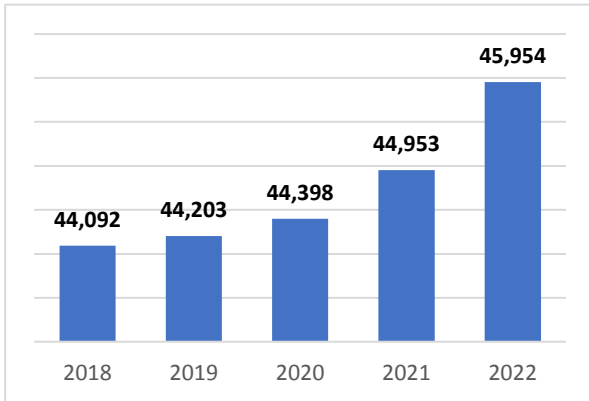
What are the concrete consequences of the driving instructor shortage?



Source: MOVING Driving School Market, 2022_2

DRIVING INSTRUCTOR SHORTAGE

Number of persons with Driving Instructor Permit, 2018 to 2022



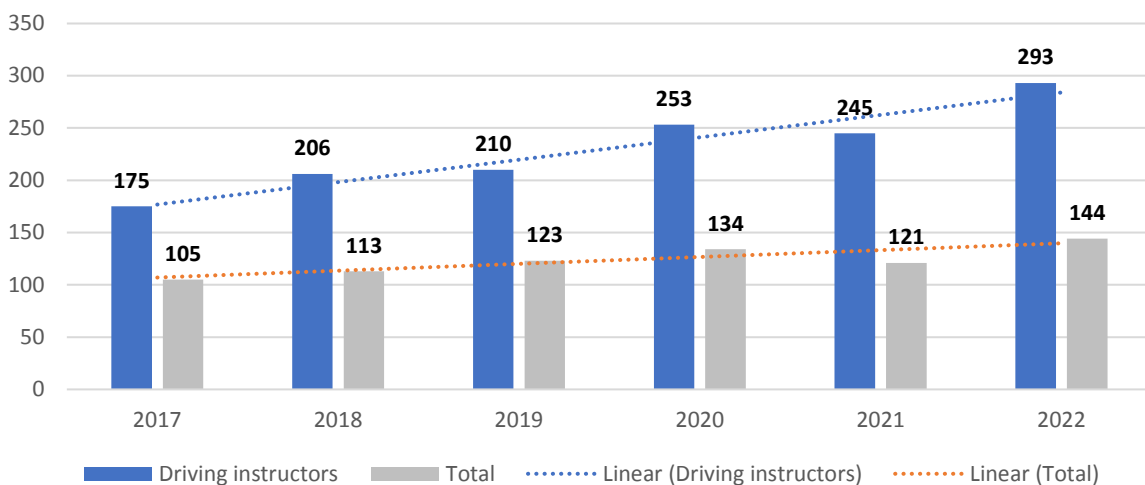
Source: Federal Motor Transport Authority, Flensburg, 2023

Just how serious the situation is is shown by the fact that every second driving school is looking for staff. 56 percent of driving schools - and even over 70 percent of very large driving schools - were looking for new driving instructors in January 2023. According to the MOVING survey from January 2023, these figures result in a current and short-term need for 11,787 driving instructors. Accordingly, 83 percent of driving schools in Germany see the shortage of driving instructors as the biggest

challenge in the coming years, and in large cities the figure is as high as 91 percent. There is a lack of staff especially for driving licence class B. According to the current MOVING survey, there is a shortage of 6,463 driving instructors in January 2023. Driving instructors for driving licence class A are also in demand. Many driving schools are currently understaffed, with an average of 1.21 driving instructors being sought. 24 percent of the driving schools would hire one, 20 percent one to two and 12 percent even more than two driving instructors. The very large driving schools in particular have an increased need and would employ an average of 2.4 new driving instructors.

These figures are supported by the labour market statistics of the Federal Employment Agency. There are still significantly more driving instructor vacancies advertised here than there are driving instructors registered as unemployed. Furthermore, twelve per cent of the driving schools are looking for suitable office staff, and 39 percent of the very large driving schools are even looking.

Vacancy time of driving instructors compared to the national average, 2017 to 2022



Source: Federal Employment Agency, Nuremberg, 2023

DRIVING INSTRUCTOR SHORTAGE

Vacancy time

The vacancy time is the period of time between the advertisement of a job and the recruitment of a suitable applicant. The figures of the Federal Employment Agency make it clear that the vacancy time for driving instructor positions is significantly longer than the average for other occupational groups. This is a clear indication that the shortage of driving instructors is far from over. On the contrary, the vacancy rate has continued to rise over the years. While it was still 175 days in 2017, it has risen to 293 in 2022, an increase of 67.5 percent. In comparison, the national average looks much better, where the vacancy time was 105 days in 2017 and has increased by 37.1 per cent to 144 by 2022. In relation to other occupational groups, it now takes about twice as long to fill a new driving instructor position. This discrepancy shows how difficult it is for driving schools to find suitable staff. This is why this will continue to be one of the greatest challenges that driving schools will have to master in the coming years.

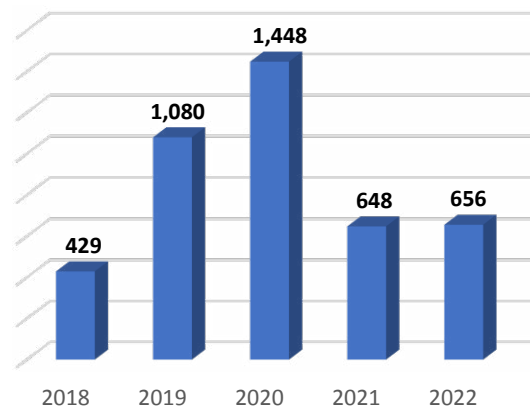
Unemployed driving instructors

Despite the large number of driving instructor jobs on offer, there are also unemployed driving instructors. From 2018 to 2022, the number of jobseekers rose from 429 to 656, but the statistics got a little out of whack due to Corona, because in 2019 and 2020, the numbers skyrocketed, peaking at 1,448 unemployed driving instructors in 2020. One year later, however, things looked quite different again, so that in 2021 there were still 648 driving instructors registered as looking for work.

Of the current jobseekers registered in 2022, only 21 were between 15 and 24 years old.

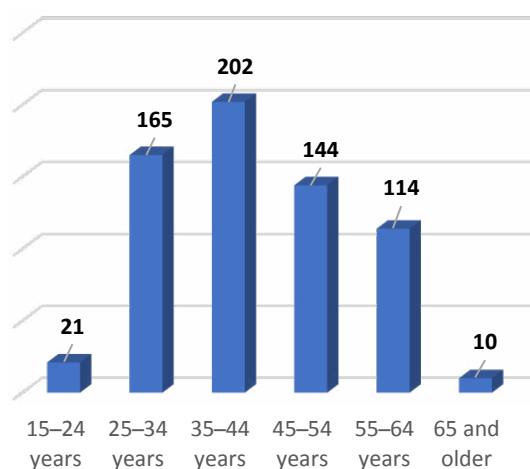
Among the 25- to 34-year-olds, 165 registered as unemployed. The largest group is the 35- to 44-year-olds with 202 jobseekers. With increasing age, the number of job-seekers decreases and finally, among the over-65s, there are only ten registered unemployed driving instructors. On the other hand, there were exactly 643 vacancies at the end of 2022.

Number of unemployed registered driving instructors, 2018 to 2022



Source: Federal Employment Agency, Nuremberg, 2023

Age structure of the number of driving instructors registered as unemployed in 2022



Source: Federal Employment Agency, Nuremberg, 2023

SUBSIDIES FROM THE FEDERAL EMPLOYMENT AGENCY

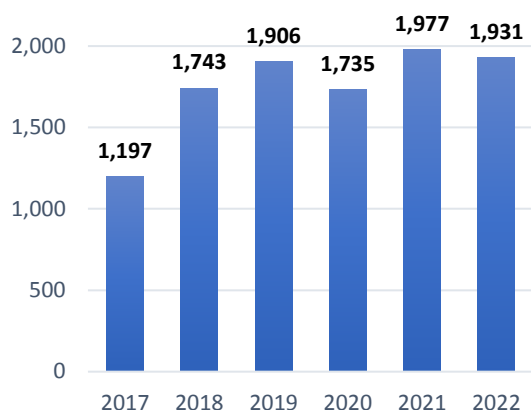
Subsidies from the Federal Employment Agency Labour

Driving instructor

Until 2012, the Federal Motor Transport Authority determined the number of new driving instructors entering the profession each year, but no longer offers this service. In order to nevertheless obtain a reasonably accurate overview of the new driving instructors, MOVING has since used the funding statistics of the Federal Employment Agency. For example, many training courses are subsidised by education vouchers.

A brief review of the year 2012 is nevertheless necessary, because the number of newly issued driving instructor licences decreased significantly due to the reform of the Bundeswehr at that time. Due to the suspension of compulsory military service, fewer young people were trained as driving instructors in the Bundeswehr. This had a direct impact on the number of driving instructors, as the number of new driving instructors dropped to well below 1,000.

Number of measures funded by the Federal Employment Agency with the training/further training objective Driving instructor, 2017 to 2022



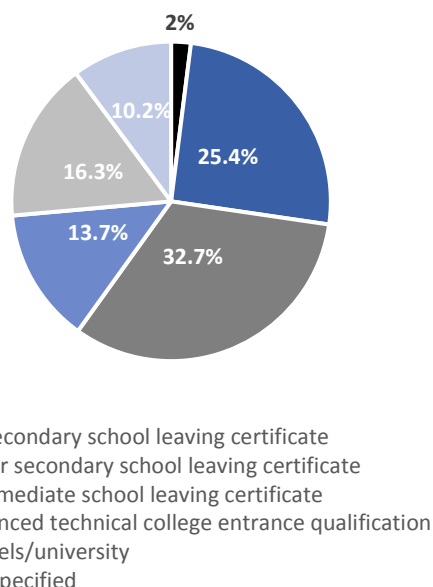
Source: Federal Employment Agency, Nuremberg, 2023

HARDFACTS

- » The Federal Employment Agency promotes a variety of measures for prospective driving instructors.
- » The profession of driving instructor is on the upswing.
- » The proportion of female driving instructors in training is increasing.

This dry spell was overcome, however, and in 2017 the number of people who took advantage of the support for measures with the goal of becoming a driving instructor rose above the magic one-thousand mark again for the first time, with 1,197. The biggest leap forward was in 2018, when the number of participants rose by 45.6 percent to 1,743. In the following years, there was a slight wave movement with the peak of 1,977 graduates in 2021, which was almost maintained in 2022.

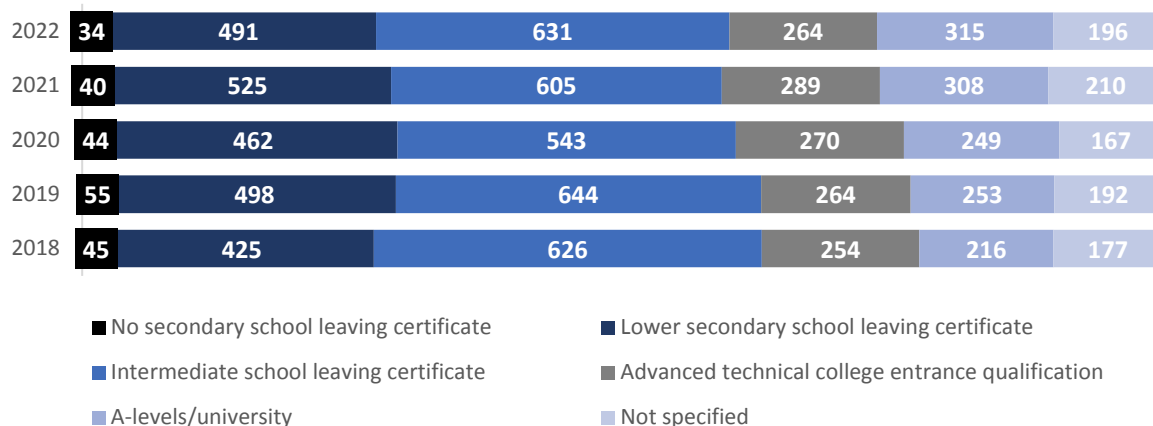
Pre-education of participants in supported measures to become driving instructors 2022



Source: Federal Employment Agency, Nuremberg, 2022

SUBSIDIES FROM THE FEDERAL EMPLOYMENT AGENCY

Number of measures funded by the Federal Employment Agency with the training/further training objective of driving instructor, by level of education, 2018 to 2022



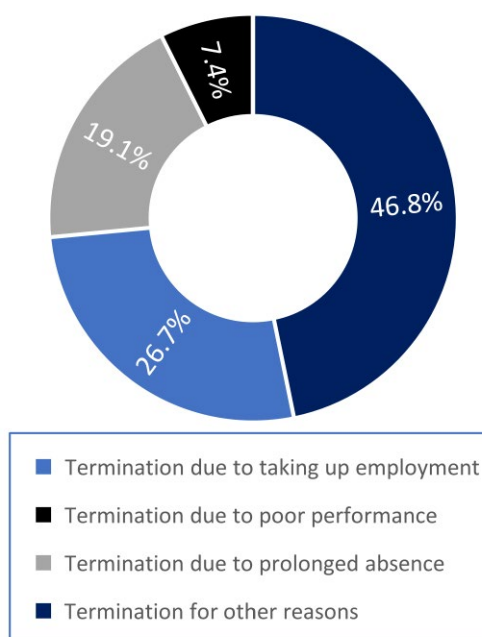
Source: Federal Employment Agency, Nuremberg, 2023

In 2022, the career goal of driving instructor was primarily pursued by participants with an intermediate school leaving certificate (32.7 %) and with a secondary general school certificate in combination with vocational training already completed (25.4 %). The number of participants who have an entrance qualification for universities of applied sciences (13.7 %) or an Abitur (16.3 %) continues to rise. Only two percent of those receiving support have no school-leaving qualifications at all. Unfortunately, there was an increase in the number of drop-outs among those who started their careers with support, as 221 participants gave up before completing the measure, which corresponds to a drop-out rate of 11.4%. In 2018, the rate was still eight percent. This trend has been confirmed over the years, although it fell by 2.3 % in 2022.

The reasons for dropping out remain unknown in almost half of the cases, as 46.8% stated other reasons for dropping out. As many as 26.7 percent left the program because they found another job and thus also worked in a different occupational field.

For 19.9 percent of participants, longer periods of absence - possibly due to illness - prevented them from achieving their training goal. Only 7.4 percent were due to poor performance.

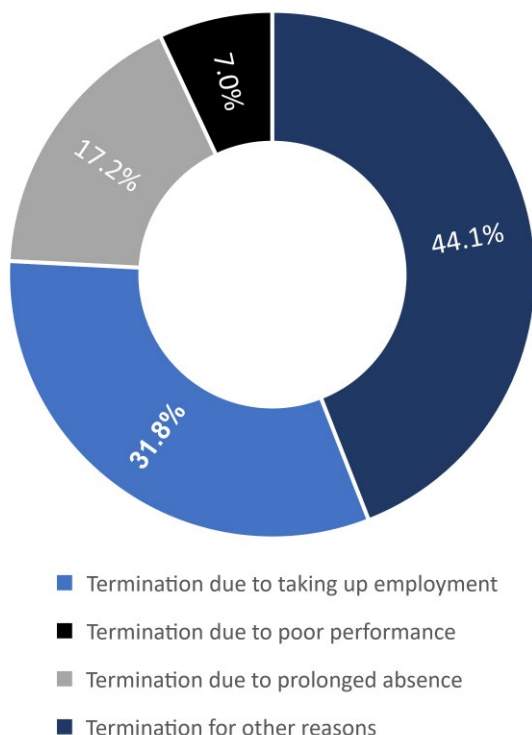
Percentage of dropouts in 2022 (driving instructor training) and reasons for this



Quelle: Bundesagentur für Arbeit, 2023

SUBSIDIES FROM THE FEDERAL EMPLOYMENT AGENCY

Number of drop-outs and reasons for funded measures with the education/training goal of becoming a professional driver in freight transport 2022



Source: Federal Employment Agency, Nuremberg, 2023

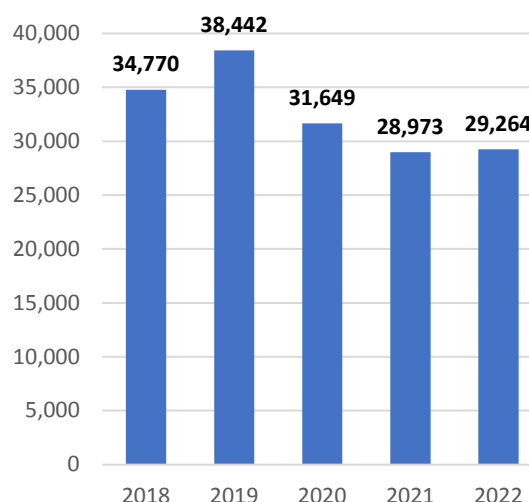
Professional driver (freight transport)

Anyone wishing to become a professional driver in freight transport can also have their training subsidised by the Federal Employment Agency. Numerous participants have made use of this option in recent years, but after an interim upward trend, there has been a clear reversal of the trend. After a steady increase from 33,612 to 38,442 participants from 2017 to 2019 (+ 14.4 %), there was a sharp drop to 31,649 participants in 2020 and even to 28,973 participants in 2021 - an absolute low.

In 2022 there is only a slight recovery to 29,264 participants. The largest share of trainee professional drivers for freight transport is still made up of participants with a lower secondary school leaving certificate (34.8 %), followed by graduates with a Mittlerer Reife (19.2 %) and participants in measures without a school leaving certificate (14.1 %). Only three per cent have a technical college entrance qualification and nine per cent have a high school diploma.

At 7.1 per cent, the dropout rate in this area of the Federal Employment Agency's measures was relatively constant. 2,065 graduates did not feel able to complete the training, with 44.1 per cent stating other reasons. 31.8 per cent dropped out of the measure because they were able to take up another job and thus became active on the labour market elsewhere. Longer absences were responsible for dropping out in 17.2 per cent of the cases and only 7.0 percent had to give up because of poor performance.

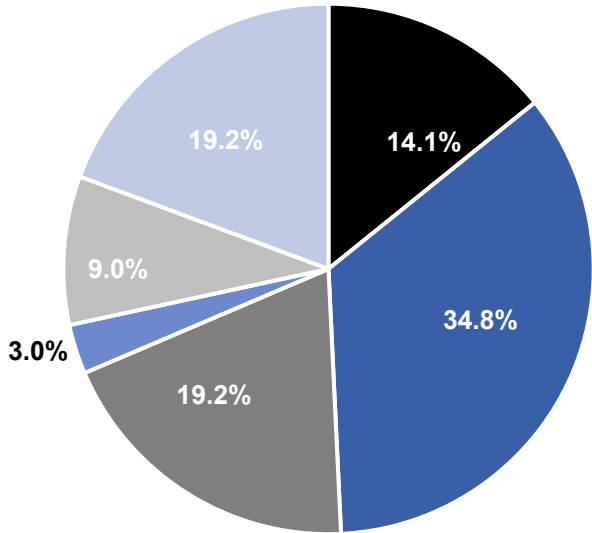
Number of measures funded by the Federal Employment Agency with the training/further training objective of professional driver in freight transport, 2018 until 2022



Source: Federal Employment Agency, Nuremberg, 2023

SUBSIDIES FROM THE FEDERAL EMPLOYMENT AGENCY

Pre-education of participants in the supported measures for professional drivers in freight transport 2022



- No secondary school leaving certificate
- Lower secondary school leaving certificate
- Intermediate school leaving certificate
- Advanced technical college entrance qualification
- A-levels/university
- Not specified

Source: Federal Employment Agency, Nuremberg, 2023

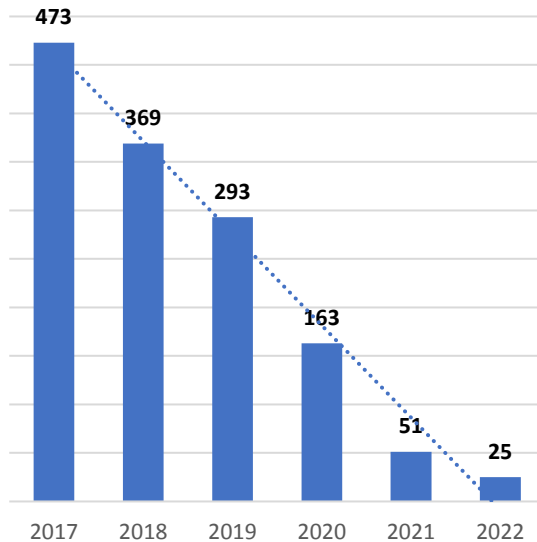
Professional driver (passenger transport)

The number of subsidized measures offered by the Federal Employment Agency for those interested in training to become a professional driver in passenger transport is almost negligible. The downward trend in this area is striking and is likely to soon mean that the measure can no longer be offered. In 2017, 473 participants completed the training, but just five years later there were only 25 potential career starters who wanted to work in passenger transport. This represents a drop of 95 percent. For MOVING, one reason is that there are too few driving instructors to train professional drivers.

At 27.5 per cent, most of the 51 participants in 2021 had completed their secondary school leaving certificate, followed by graduates without a school leaving certificate (21.6 %) and with a lower secondary school leaving certificate (17.6 %). Advanced technical college entrance qualification (7.8 %) and A-levels (7.8 %) were balanced and 17.6 percent did not give any information.

The dropout rate in 2021 was 11.8 per cent, which means that exactly six participants did not complete the measure, whereas 45 participants were successful. A breakdown of the reasons for this is no longer useful and not very meaningful with these low numbers, so it is not included.

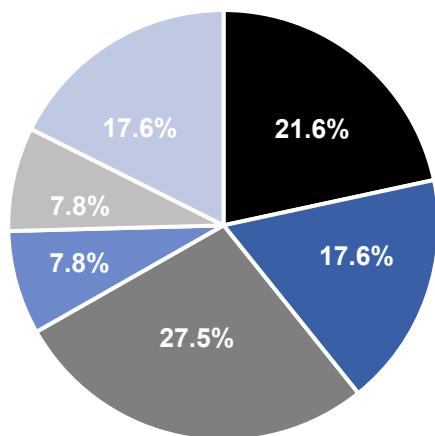
Number of measures funded by the Federal Employment Agency with the training/further training objective of professional driver in passenger transport, 2017 to 2022



Source: Federal Employment Agency, Nuremberg, 2023

SUBSIDIES FROM THE FEDERAL EMPLOYMENT AGENCY

Previous education of the participants in the supported measures to become a professional driver in passenger transport, 2021



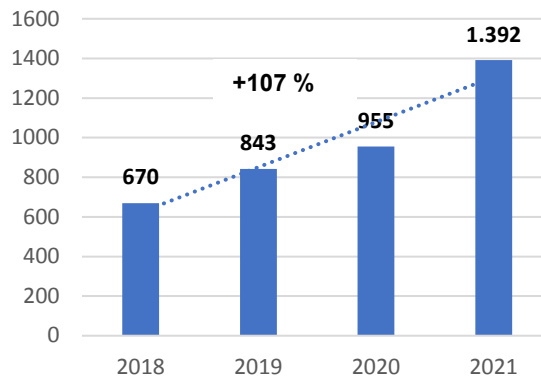
- No secondary school leaving certificate
- Lower secondary school leaving certificate
- Intermediate school leaving certificate
- Advanced technical college entrance qualification
- A-levels/university
- Not specified

Source: Federal Employment Agency, Nuremberg, 2022

Bafög

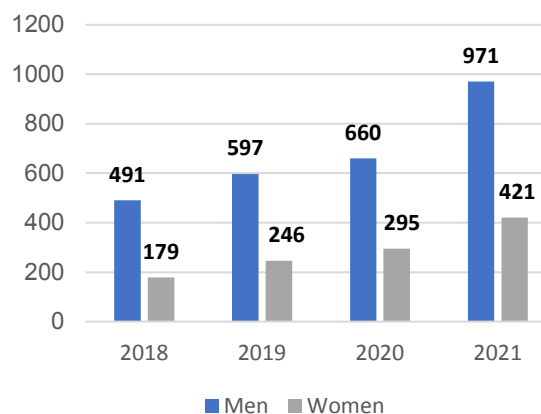
Training to become a driving instructor is supported by the Ministry of Education. In 2021, 1,392 driving instructors were supported by Meister-Bafög or Aufstiegs-Bafög. This is an impressive 107 percent more than in 2018 and thus a clear indication of the upward trend, as the driving instructor profession has climbed from 46th to 34th place among the most heavily funded training professions. The increase is even more pronounced for women, as 179 female driving instructors were supported in 2018, compared to 421 in 2021, an increase of 135 percent. In addition, the proportion of women within the upgrading grant increased from 27 to 30 percent between 2018 and 2021. Calculated on the total of 1,392 funded participants, 97 percent were in full-time employment.

Number of driving instructors supported by Aufstiegs-Bafög, 2018 to 2021



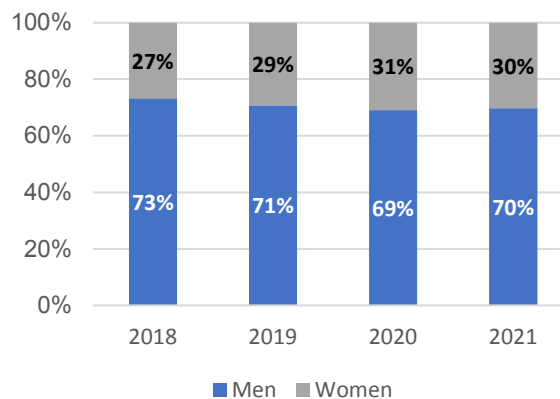
Source: Federal Statistical Office, Wiesbaden, 2022

Number of funded driving instructors by gender, 2018 to 2021



Source: Federal Statistical Office, Wiesbaden, 2022

Number of funded driving instructors, 2018 to 2021



Source: Federal Statistical Office, Wiesbaden, 2022

SUCCESSION SITUATION IN THE DRIVING SCHOOLS

Succession situation

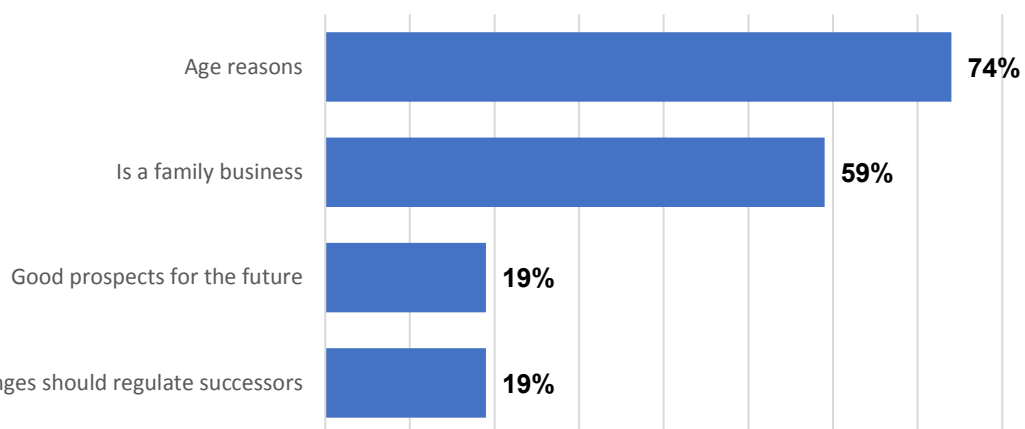
Apart from the lack of driving instructors, a problem that affects the entire industry is the ageing of the driving instructors. The average age is now 54.2 years, which is why it is important that young driving instructors take over. This also has an impact on the succession situation of driving schools, because those who want to retire for age reasons do not always find a suitable successor. At the same time, there is a great desire to pass the business on to good hands.

In a MOVING survey conducted in 2022, handover within the family is still the most frequently chosen age. A total of 28 percent said they no longer wanted to run their business themselves. 42.8 percent of these driving school owners who want to retire have found a successor within the family. For 74 percent, age was the decisive factor for the handover.

28.6 percent of future retirees are planning to hand over their business to a third party. Here, too, age reasons are in first place with 79 percent, 42 percent do not want to work so much any more, but still want to remain a little active and 21 percent give personal reasons. 16 percent believe that small driving schools will no longer be competitive in the long run.

However, 28.6 percent of the driving schools that would have needed a successor for reasons of age (78 %) are completely closed. 39 percent have not found a buyer for their business, 17 percent fear poor future prospects and no longer feel competitive as a small driving school, and another 17 percent no longer want to invest in digitalisation.

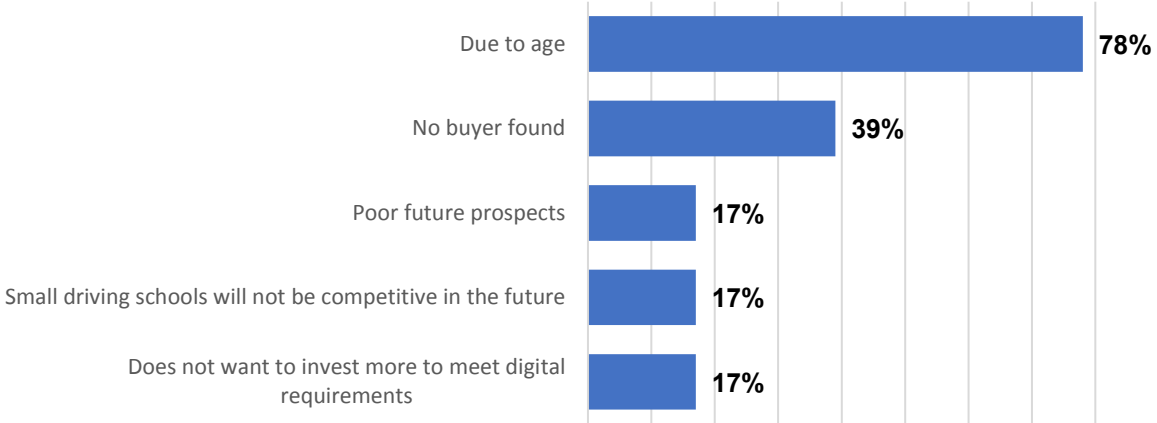
What are the reasons for you to hand over the business within the family?



Source: MOVING Market Insights, 2022

SUCCESSION SITUATION IN THE DRIVING SCHOOLS

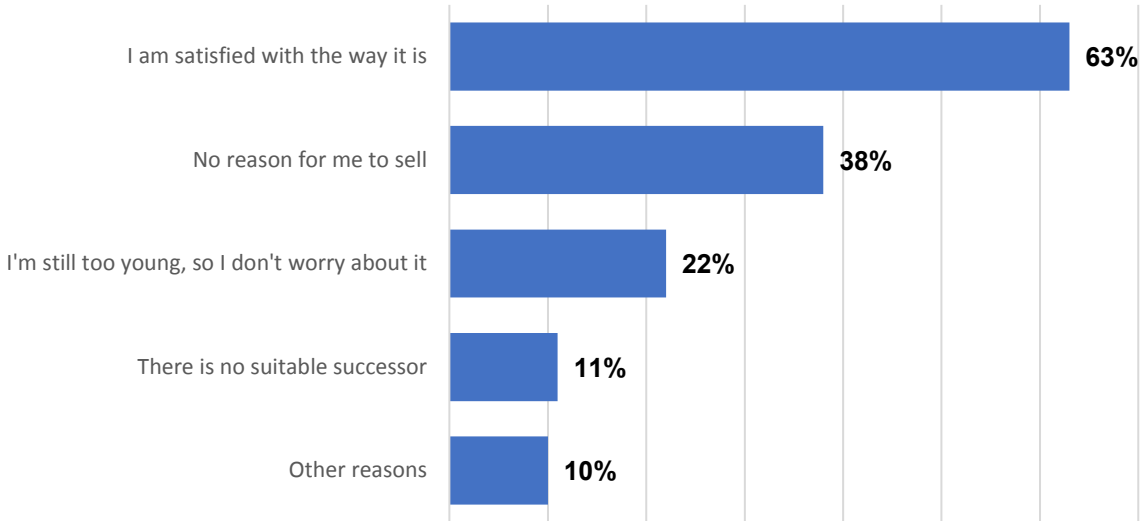
What are the reasons for you to give up your business completely?



Source: MOVING-Market Insights, 2022

However, most driving schools are continuing, with 63 percent stating that they are satisfied with the situation, 38 percent saw no reason to sell and 22 percent felt they were still too young to do so. However, a further eleven percent are continuing because they have not yet found a suitable successor.

What are the reasons for you to continue running your business?



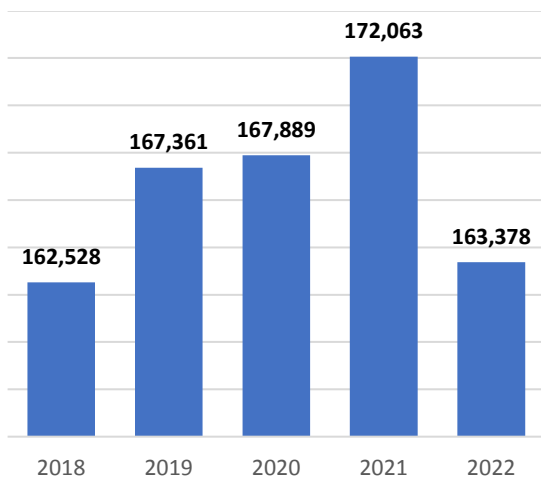
Source: MOVING-Market Insights, 2022

DEMAND

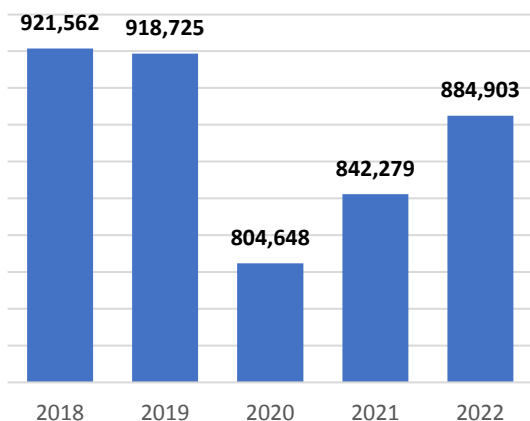
Demand

Every year, the Federal Motor Transport Authority publishes statistics on the examinations passed in the various driving licence categories. MOVING uses these figures as a basis for making statements about demand, because they provide a valid indication of how the situation has developed in the individual areas. The development of the driving licence classes is different, because while the number of tests in classes A, B and C has increased again since 2021 after the Corona year, the number of tests in class D for buses is declining.

Passed practical examinations class A, 2018 to 2022



Passed practical examinations class B, 2018 to 2022



Source: Federal Motor Transport Authority, Flensburg, 2023

HARDFACTS

- » The number of passed practical examinations class B has slightly improved.
- » There has been a significant decline in the D-category.
- » High Arabic remains the foreign language most in demand.

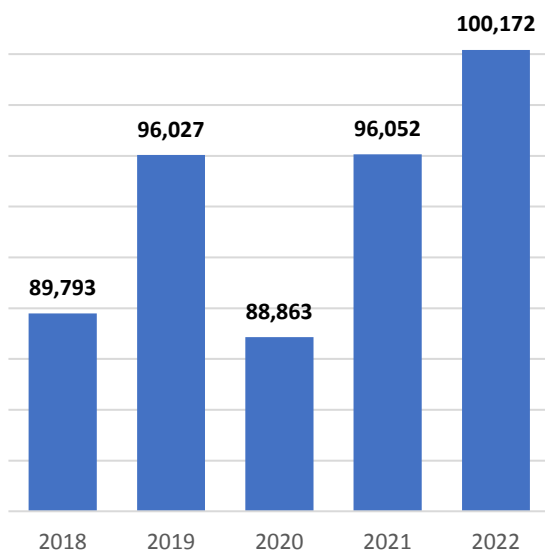
The motorbike driving licence is still popular and accordingly this training is offered in almost all driving schools. After a small slump in 2018, the number of practical examinations passed has increased continuously since then, and even in 2020, when there were decreases everywhere, the development remained positive, but then fell back to 163,378 in 2022. After the number of car driver's licence tests passed was always above 900,000 in the years 2017 to 2019, Corona caused a big drop to 804,648. One year later, things look a little better again, although Corona was still not out of the picture in 2021. Nevertheless, 842,279 examinees were certified as having passed the exam. In 2022, the number increased further to 884,903. The proportion of examinees who used accompanied driving from the age of 17 declined somewhat. While in 2019 the figure was 40.9 percent, in 2021 it fell to 38.7 percent.

Obtaining a driving licence for a lorry is still desirable for many. After the small „coronadelle“, the number has increased significantly by 2022. 100,172 learner drivers passed the C1, C1E, C and CE exams with flying colours, continuing the positive trend seen before Corona.

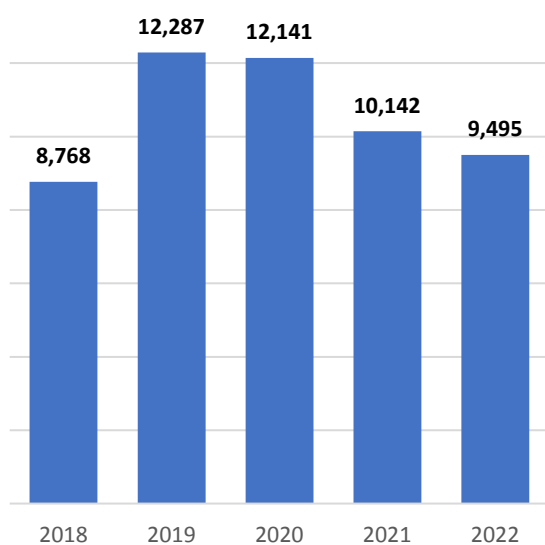
DEMAND

The number of successfully completed practical examinations for bus drivers has developed against the trend. While more than 12,000 examinations were taken in 2019 and 2020, this number has dropped significantly by 22.7 percent to 9,495 by 2022. It is not yet possible to predict whether this will be a long-term trend.

Passed practical examinations class C, 2018 to 2022



Passed practical examinations class D, 2018 to 2022



Source: Federal Motor Transport Authority, Flensburg, 2023

Professional driver

The shortage of professional drivers has worsened in recent years and affects not only Germany but the whole of Europe. According to a recent report by the International Road Transport Union (IRU), there were around 425,000 vacancies for truck drivers in Europe in 2021. According to the German Road Haulage, Logistics and Disposal Association (BGL), there is currently a shortage of between 80,000 and 100,000 truck drivers in Germany. There are many reasons for this, including unfavourable working hours, overtime and below-average wages.

Professional Driver Qualification Register

The change in initial and further training in the driving licence classes CE and DE according to the Professional Driver Qualification Register (BKRFQG) has now been implemented by most driving schools. Driving schools had until 2 December 2022 to register as a training centre, otherwise they are no longer allowed to offer classes for accelerated basic qualification or further training. Non-compliance could result in fines of up to 20,000 euros. MOVING assumes in its calculation that there are about 3,500 driving schools offering training in categories C and D, but 2,850 driving schools have registered. Only state-recognised training centres have access to the BQR. The connection is made via the internet. For this purpose, the recognition authority must transmit the contact data of the training centre to the KBA. As a training centre, an Elster company account is required for authentication. The company data must be identical to that of the state recognition. Otherwise access to the BQR cannot be guaranteed.

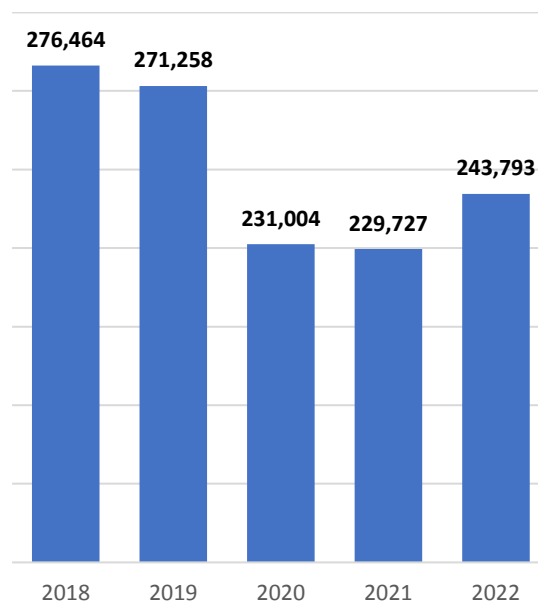
DEMAND

Number of all theory tests	2019	2020	2021	2022
Total (first attempt and repeat)	1,801,386	1,657,105	1,734,396	1,811,053
Foreign language theory exams	271,258	231,004	229,727	243,793
High Arabic theory exams	131,277	103,837	96,364	101,316

Foreign language examinations

The share of foreign-language examinations in the total number of subject examinations conducted is declining slightly and in 2022 still amounts to 13.5 percent (including the first and repeat examinations in all driving licence classes). High Arabic is still the language in which most foreign-language examinations are conducted, but after more than 150,000 High Arabic examinations were held in 2018, this number decreased significantly to 103,837 in 2020 and is currently at this level with 101,316. This means that 41.6 per cent of all foreign-language examinations are in High Arabic. After a small slump in 2020 and 2021, the total number of foreign-language examinations has risen again to 243,748, and the trend is also likely to be confirmed in the future in view of the continued high immigration.

Number of theory examinations conducted in foreign languages, 2018 to 2022



Source: TÜV/DEKRA arge tp 21, 2023

DRIVING LESSONS AND LICENCE PRICES

Driving licence costs class B

In view of drastically rising costs, mainly due to the energy crisis, driving schools also had to successively increase the prices of driving lessons. The average price for a normal driving lesson (45 minutes) in class B was exactly 58 euros in January 2023, four percent more than in the second half of 2022. Within three years, this means an increase of 15.30 euros or the equivalent of 35.8 percent. Just under a third of all driving schools offer an hour for 61 euros or more. The price for a special driving lesson has risen to an average of 67 euros. The total cost of a Class B driving licence has risen to an average of 2,772 euros, 9.6 percent higher than at the beginning of 2022. An end to the price increases is not in sight in 2023 either, because according to the survey, every second driving school is planning a further increase within the first half of 2023.

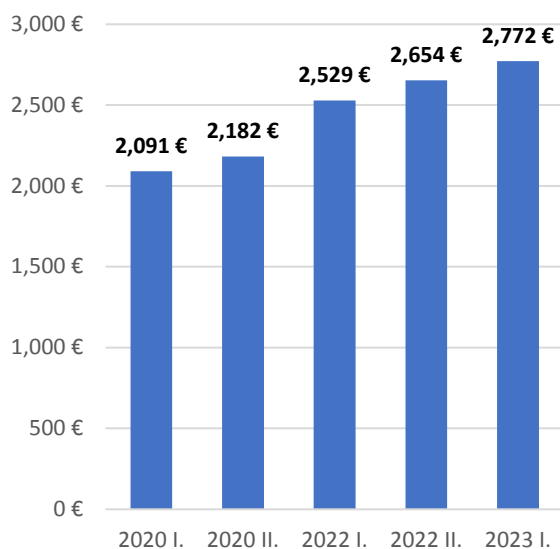
The MOVING survey in January 2023 revealed that there are still price differences both between driving school sizes and between regions. For example, the price for a normal driving lesson,

HARDFACTS

- » A car driving license costs an average of 2,772 euros.
- » The prices for driving lessons and driving licenses are continuously rising.
- » Pure distance theory classes could ensure further price increases.

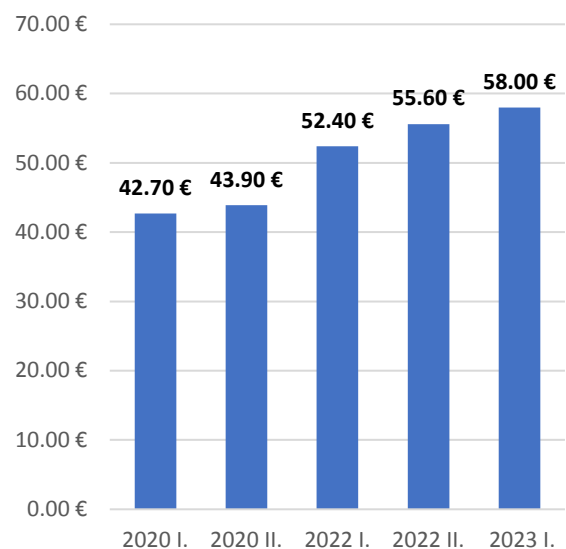
which averaged 58 euros, was almost 62 euros in the very large driving schools, while the hour in the small driving schools only cost 52.60 euros. In large cities, an average of 59 euros was charged per driving lesson, compared with 57.50 euros in rural regions. There are still differences between the west and east of Germany, as in the old federal states the hourly rate averaged 59.70 euros, while in the new federal states learner drivers paid an average of 52.70 euros.

Average cost of driving licence class B, 2020 to 2023



Source: MOVING Driving School Market, 2023_1, MOVING Driving School Climate Index, 2020

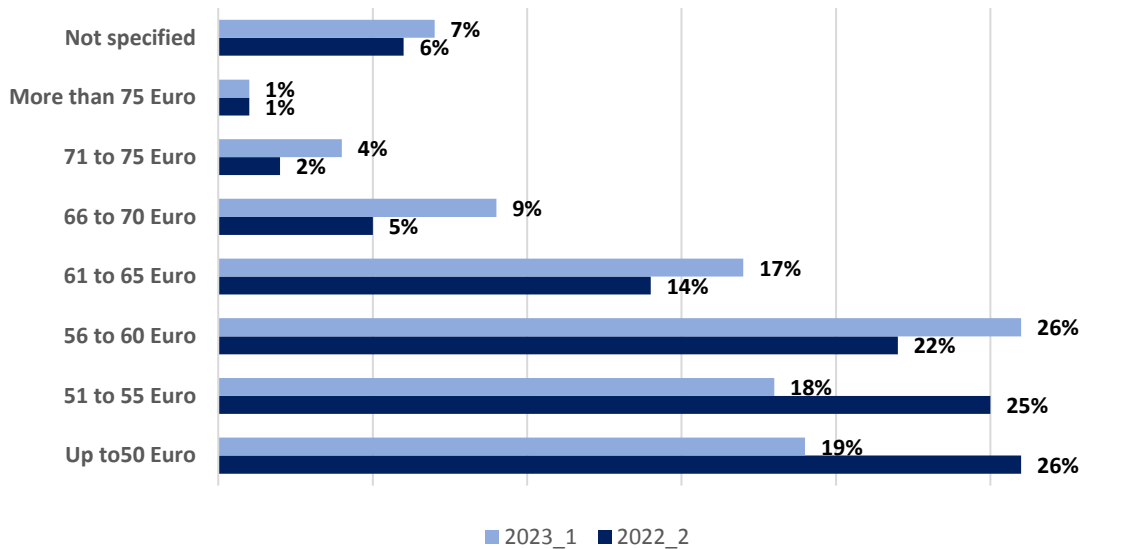
Average cost of practical driving lesson class B, 2020 to 2023



Source: MOVING Driving School Market, 2023_1, MOVING Driving School Climate Index, 2020

DRIVING LESSONS AND LICENCE PRICES

Cost for a normal practical driving lesson class B (45 minutes)

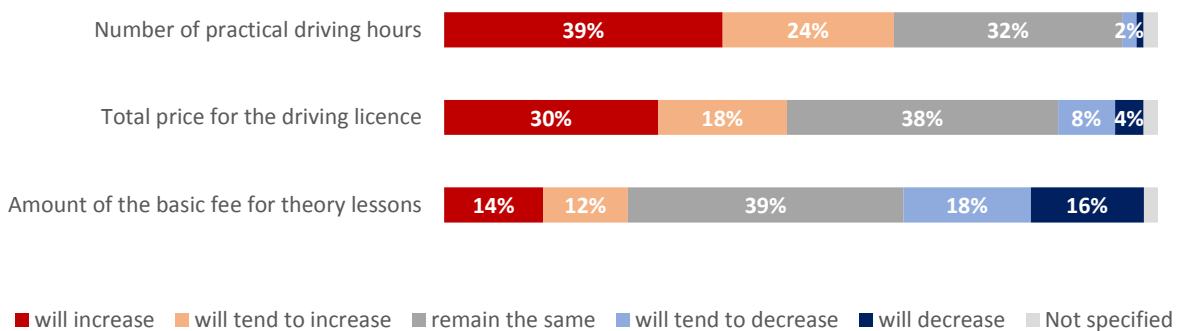


Source: MOVING Driving School Market, 2023_1

In the event that pure distance theory lessons continue to increase, 63 percent of the driving schools surveyed expect the number of practical driving lessons required to increase by around 8.5 hours. This would mean that the total costs per driving license would also continue to rise,

48 percent of driving schools are convinced of this. Many driving schools assume that parts of the theory lessons will have to be moved to the car because the content cannot be adequately conveyed in distance learning.

What are the implications of increasing online-only teaching?



Source: MOVING Driving School Market, 2022_2

DRIVING LESSONS AND LICENCE PRICES

Driving licence costs for other classes

The trend is no different in the other driving licence classes. The average price for a normal driving lesson (45 minutes) in class A (A1 and A2) rose within one year from 59.05 euros in January 2022 to 64.35 euros in January 2023 (+ 9 %). This means that the total costs for the driving licence have also climbed to 2,291 euros.

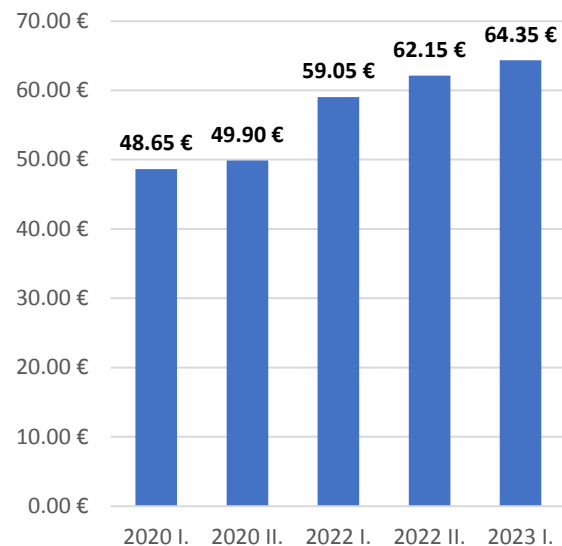
In addition to driving licence classes C and D, driving schools offering training for professional drivers also offer the accelerated basic qualification, which is a prerequisite for the work of professional drivers. On 2 December 2022, there was a change in the initial and further training according to the Professional Driver Qualification Register (BKrFQG) - explanation in the chapter „Demand“. The costs of the training are very individual, as the need for training varies greatly according to previous knowledge, such as the existing driving licence class. MOVING has determined the average cost in January 2023 to be exactly 4,616 euros, which is 10.5 percent more than in January 2022.

Average driving licence costs

	Average in brackets = January 2022	Change in percent
Driving licence A	2,291 € (2,130 €)	7.6 %
Standard driving lesson A	64.35 € (59.05 €)	9.0 %
Driving licence B	2,772 € (2,529 €)	9.6 %
Standard driving lesson B	58.00 € (52.40 €)	10.7 %
Driving licence C + CE	4,616 € (4,176 €)	10.5 %

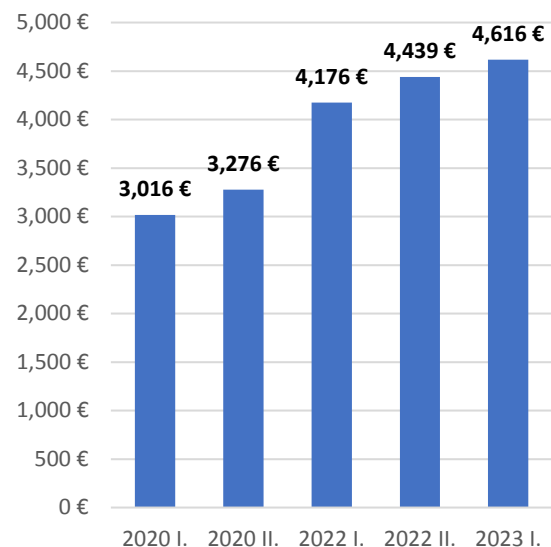
Quelle: MOVING Fahrschul-Markt, 2023_1

Average costs for a 45-minute driving lesson for driving licence class A (A1+A2), 2020 to 2023



Source: MOVING Driving School Market, 2023_1, MOVING Driving School Climate Index, 2020

Average costs for the driving licence class C, 2020 to 2023



Source: MOVING Driving School Market, 2023_1, MOVING Driving School Climate Index, 2020

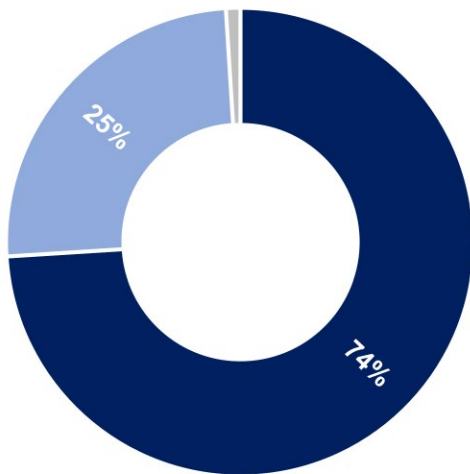
DRIVING LESSONS AND LICENCE PRICES

Driving licence costs continue to rise

The costs for driving licences will continue to rise in all driving licence categories. There have already been price adjustments across the board in 2022. Almost three quarters of all driving schools have increased their prices in the second half of 2022. Of these, 81 per cent were small driving schools, but large (72 %) and very large (74 %) driving schools also had to take the increased costs into account.

Further price increases are also on the cards for the first half of 2023. According to the MOVING survey, half of all driving schools will have to raise their prices, and this applies to all driving school sizes and regions. Only 44 percent stated that they want to keep prices stable in the first half of 2023.

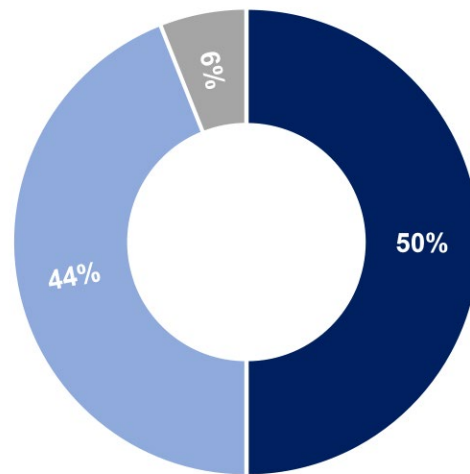
Have you checked the prices in the raised in the second half of 2022?



■ Yes ■ No ■ Not specified

Source: MOVING Driving School Market, 2023_1

Are you planning further price increases in the first half of 2023?



■ Yes ■ No ■ Not specified

Source: MOVING Driving School Market, 2023_1

LEARNER DRIVER TRAINING

HARDFACTS

- » **Uniform standard for learner driver education.**
- » **The compulsory segment for obtaining the car driving licence ist 14 hours of theory and 12 special drives.**
- » **On average, 25 kilometres are driven per lesson.**

Learner driver training

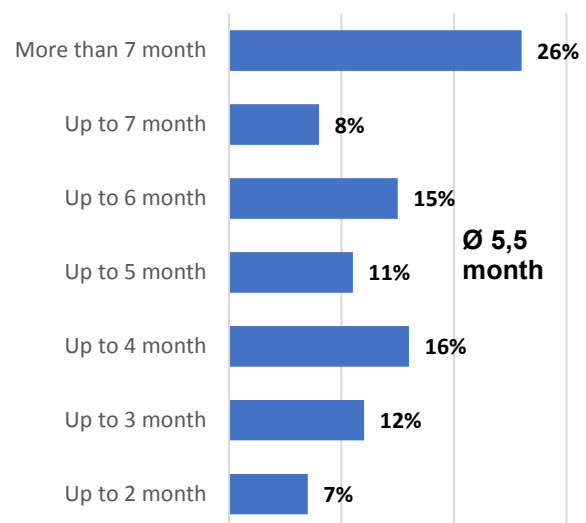
The training of learner drivers is uniformly regulated throughout Germany in the learner driver training regulations and is therefore standard for all driving schools. According to § 1, the aim of the training is to enable drivers to become safe, responsible and environmentally aware road users. Every learner driver must complete a theoretical and a practical part of the training. The number of theoretical and practical hours to be completed depends on the driving license category and the abilities of the learner driver. In category B (passenger cars), 14 hours of theory and twelve hours of so-called special driving (interurban, highway and night driving) are mandatory.

Before a learner driver can complete the special driving course, they must have completed the basic training. The number of training hours required for this depends on the performance of the learner driver. One lesson usually lasts 45 minutes. The majority of driving schools already provide learner drivers with practical training in the use of driver assistance systems. On average, learner drivers need 33 driving lessons (car) or 23 (driving license category A) to pass the test. An average of 25 kilometers are driven in a car driving lesson.

According to our findings, a complete car driving training course currently takes an average of 5.5 months or seven months due to delays caused by the coronavirus, for example when registering for the test.

One way of using driving instructors more efficiently is intensive or compact training. Learner drivers have the opportunity to complete their driving training in a short period of time, usually two weeks for cars. This type of training is mainly used during school vacations. Theory and practical training follow a tight timetable. The test dates are arranged in advance. More than every second driving school offers this type of intensive course for car training (at least for theory lessons). If this offer is available, it is used by almost one in three learner drivers. In particular, very large driving schools with more than ten employees offer compact training courses. Over half of these very large driving schools offer both theory and practical lessons as compact training and a further quarter offer theory lessons as compact training.

How long do you need to obtain your driving licence?



Source: MOVING learner driver survey, 2022

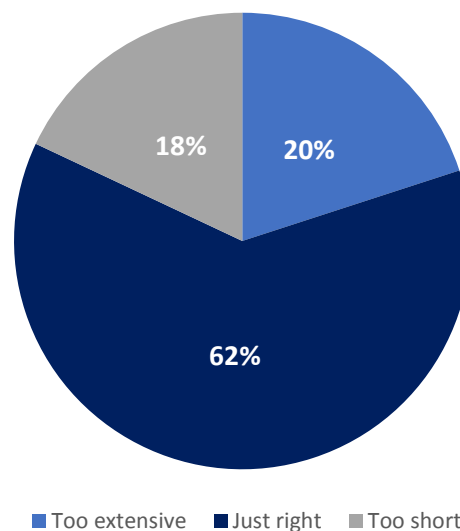
LEARNER DRIVER TRAINING

B 196

In February 2022, MOVING, in coordination with the Federal Highway Research Institute, launched a survey on the subject of B 196 among 332 participants in a course. Since January 2020, it has been possible for holders of driving licence class B to obtain a driving licence with the key number 196 in accordance with § 6b of the Driving Licence Ordinance (FeV). This allows motorbikes (including those with sidecars) with a cylinder capacity of up to 125 cc, a motor power of no more than eleven kW and a power-to-weight ratio of no more than 0.1 kW/kg to be driven. Prerequisites for the issuance of the key number are a minimum age of 25 years, at least five years of possession of the passenger car driving licence as well as successful participation in a driver training course, which must comprise at least four double hours of theory and five double hours of practical driving training (Annex 7b FeV). In a MOVING survey in 2022, 62 percent felt that the number of theory hours was „just right“. In practice, however, almost half (49 %) would like more lessons.

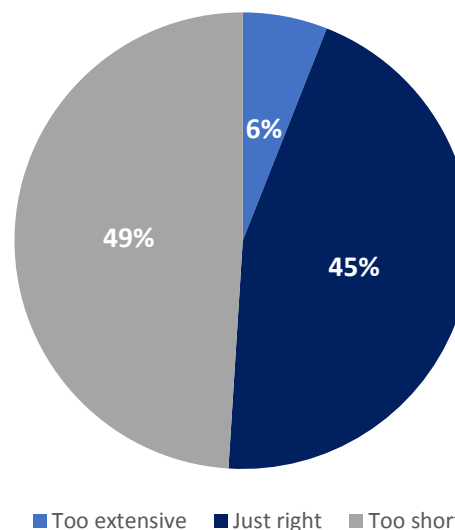
The Federal Highway Research Institute (Bundesanstalt für Straßenwesen) is responsible for evaluating this regulation in accordance with § 6b para. 6 FeV. Between 1 January 2020 and 1 January 2023, approx. 185,000 B196 authorisations were acquired. The key number 196 was registered most frequently for driving licence holders in Baden-Württemberg, Bavaria and North Rhine-Westphalia.

Do you think four double lessons of theory are sufficient?



Source: MOVING survey, 2022

Do you consider five double hours of practice to be sufficient?



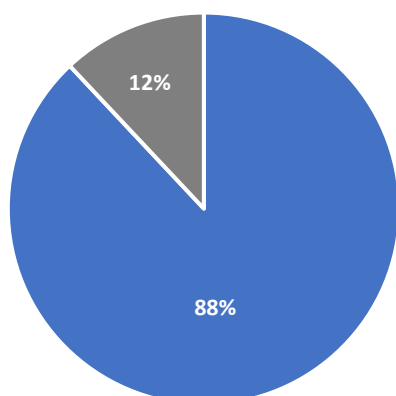
Source: MOVING survey, 2022

LEARNER DRIVER TRAINING

In relation to the number of inhabitants, Baden-Württemberg, Bavaria, Brandenburg, Hesse, Rhineland-Palatinate and Saarland were above the national average of 462 registrations per inhabitant. 100,000 inhabitants aged 25 to 60. In Baden-Württemberg, interest was highest with 589 entitlements per 100,000 inhabitants, followed by Bavaria with 555 and Hessen with 530 entitlements per 100,000 inhabitants. In Bremen, Mecklenburg-Western Pomerania, Saxony, Saxony-Anhalt and Thuringia, the regulation was used to a lesser extent with up to 300 authorisations per 100,000 inhabitants.

The interest in B196 was more pronounced among licence holders than among female licence holders, with about three quarters of the total number of licences acquired. Among men, roughly the same number of licences were held by persons aged between 31 and 44 years and those aged between 45 and 44 years. 60 years. Among women, on the other hand, the largest proportion of people with B196 was between the ages of 45 and 60. Regardless of gender, persons between 31 and 60 years of age make equal use of the B196 regulation.

Successful participation in the course



■ Completed ■ Cancelled

Source: MOVING survey, 2022

Number of B196 authorisations acquired 1 January 2020 until 1 January 2023

State	Number (absolute)	Number per 100.000 inhabitants (25 to 60 years)
Baden-Württemberg	31,959	589
Bavaria	36,122	555
Berlin	8,314	432
Brandenburg	5,639	480
Bremen	873	266
Hamburg	4,053	416
Hesse	16,322	530
Mecklenburg-Western Pomerania	2,208	301
Lower Saxony	14,220	374
North Rhine-Westphalia	38,143	442
Rhineland-Palatinate	9,787	500
Saarland	2,244	489
Saxony	4,539	248
Saxony-Anhalt	2,724	279
Schleswig-Holstein	5,454	394
Thuringia	2,765	290
Total	185,366	462

Source: Federal Motor Transport Authority, Flensburg, 2023

THEORY LESSONS

HARDFACTS

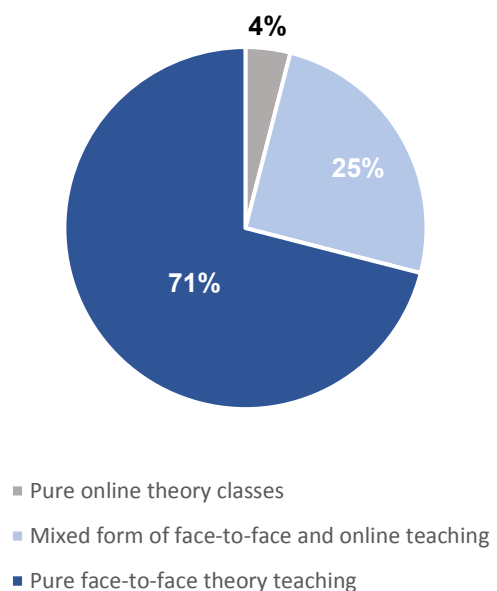
- » **96% of driving instructors rely on face-to-face theory lessons.**
- » **Interaction between driving instructor and learner driver in presence better.**
- » **Small driving schools see a risk in distance-only theory lessons.**

Face-to-face teaching is favoured

The corona pandemic has accelerated the digitalisation of driving schools. For a long time, distance learning was the only way to impart theoretical knowledge. But both driving instructors and learner drivers were relieved when they could go back to face-to-face lessons. In January 2023, 96 per cent (95 % in January 2022) of the driving schools surveyed were against distance-only theory training. 71 percent (60 % in January 2022) were even of the opinion that theory training after the pandemic should be completed as pure face-to-face theory training. Twenty-five per cent (35 %) were in favour of a mixed form of classroom and online teaching, while four per cent favoured purely online teaching. Both the current figures and the trend clearly indicate that driving schools consider face-to-face lessons to be indispensable on the basis of their experience. There are differences between small, medium and large driving schools: 83 percent of the small driving schools would like to have purely face-to-face instruction, 73 percent of the medium, 66 percent of the large and 65 percent of the very large driving schools. 84 percent of the driving schools in Germany are in favour of a mandatory part of the theory training as face-to-face instruction.

However, not only the driving schools, but also the learner drivers are by a large majority against purely online theory lessons in the MOVING survey. According to the pandemic, 52 percent want exclusively face-to-face instruction and another 35 percent a combination of face-to-face and online instruction, while only eleven per cent advocate purely online instruction. In total, this means that 87 percent of all learner drivers prefer face-to-face instruction. The most important factors for this decision lie above all in the social interaction, because 75 percent rate the exchange with the driving instructors and the other students better in face-to-face lessons, only five percent rate online higher. In addition, presence is better suited to asking questions and receiving explanations (72 %) as well as learning the correct traffic behaviour and how to deal with other road users (68 %).

What form of theory teaching do driving instructors prefer?



Source: MOVING Driving School Market, 2023_1

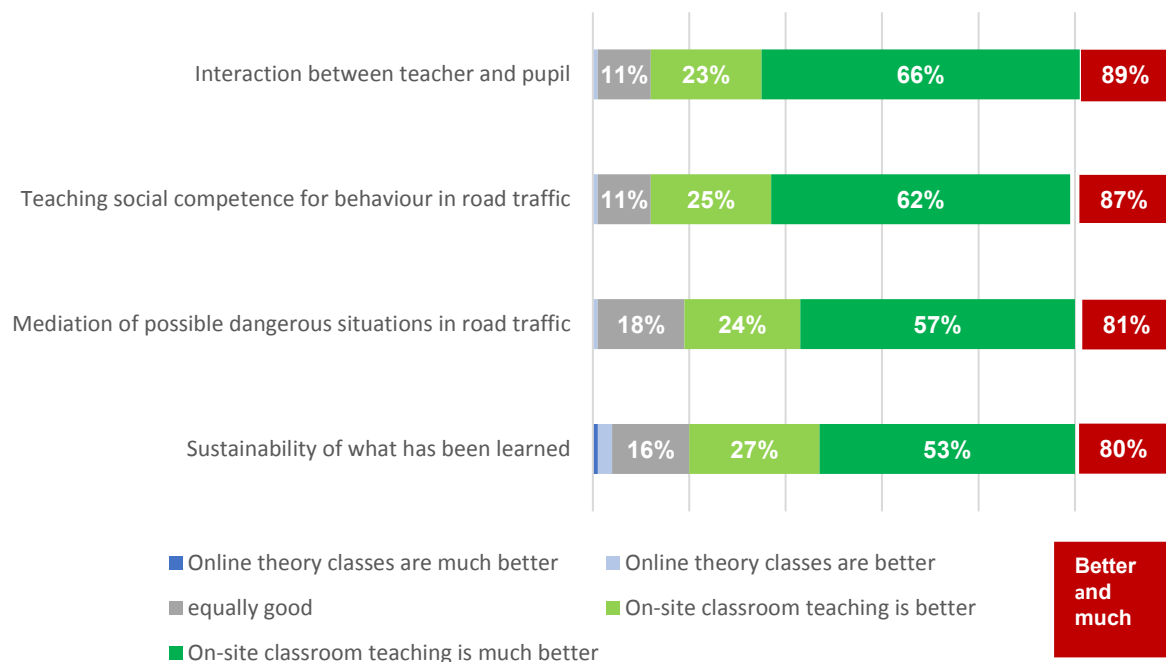
THEORY LESSONS

During training, driving instructors and learner drivers develop a personal relationship level, which is an essential element not only in practical driving lessons. Especially in theory lessons in a group, many topics can be worked on more intensively and emotionally on this basis. Gestures and facial expressions are essential building blocks of communication that are almost completely lost in distance learning, and this leads to deficits on the relationship level and damages the personality development of the learner driver. In the MOVING survey, the driving instructors also rated the quality of face-to-face instruction significantly higher than that of purely online theory instruction. The respondents rated various aspects: Above all, the interaction between instructor and student was rated 89 percent higher, 66 percent even said „much better“. The teaching of social skills for behaviour in road traffic is, according to the respondents, „much better“.

The teaching of social skills for behavior in road traffic is, according to 87% of driving instructors believe that face-to-face lessons are more effective. This also applies to the teaching of potentially dangerous situations in road traffic (81 %) and the sustainability of what has been learned (80 %). In an expert opinion on distance learning, Prof. Dr. Dr. Manfred Spitzer points out that learner drivers from disadvantaged marginalized groups in society would have less chance of acquiring a driving license as a result.

The figures are from the August 2022 survey and are all one to five percent higher than those from the January survey. In addition to the significantly better interaction between driving instructor and learner, interaction between learner drivers also plays a major role, and this would be completely eliminated with purely online lessons. The goal of equipping learner drivers with the necessary driving and traffic skills so that they can participate safely in road traffic would clearly be jeopardized.

How do driving instructors evaluate theory lessons?



Source: MOVING Driving School Market, 2022_2

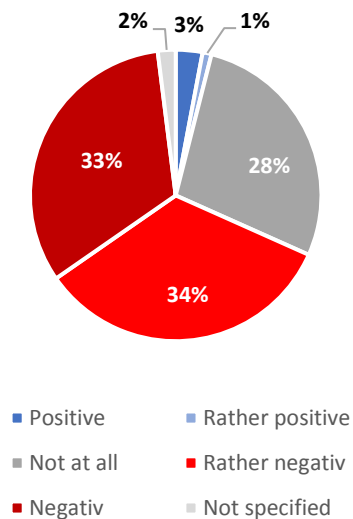
THEORY LESSONS

Smaller driving schools in particular see online-only theory lessons as an economic risk rather than an opportunity. 37 percent even see it as a big risk, while 42 percent of the large driving schools see it as an opportunity. Especially in rural regions, there is a risk that online-only instruction will cause large chains to close their smaller branches and thus worsen the density of supply.

Driving schools fear that online-only theory lessons will have a negative impact on road safety. 67 percent of driving schools are of this opinion. There has been a significant change here since the survey in January 2022, when it was only 42 percent. The reason why the percentage has increased so significantly is that driving instructors have recognized that online-only lessons have not led to the desired results, as many learner drivers have significant deficits in their driving and traffic skills. This is also confirmed by the results of a study by Prof. Dr. Manfred Spitzer, who came to the conclusion that distance-only lessons reduce the quality and effectiveness of driving lessons of theory lessons decrease significantly.

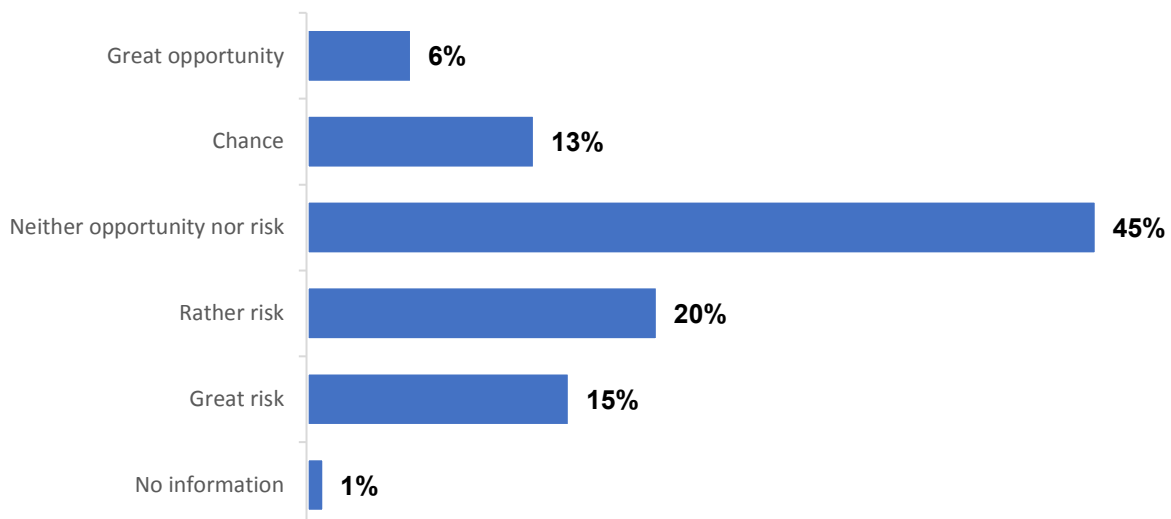
The interactions between teachers and pupils, which are so important for learning and especially social learning, would be significantly reduced and the equally important interactions between pupils would be completely eliminated.

What effects do driving schools expect a purely online theory lesson to have on road safety?



Source: MOVING Driving School Market, 2022_2

Do you see an opportunity or rather a risk in purely online theory teaching?



Source: MOVING Driving School Market, 2022_2

THEORY LESSONS

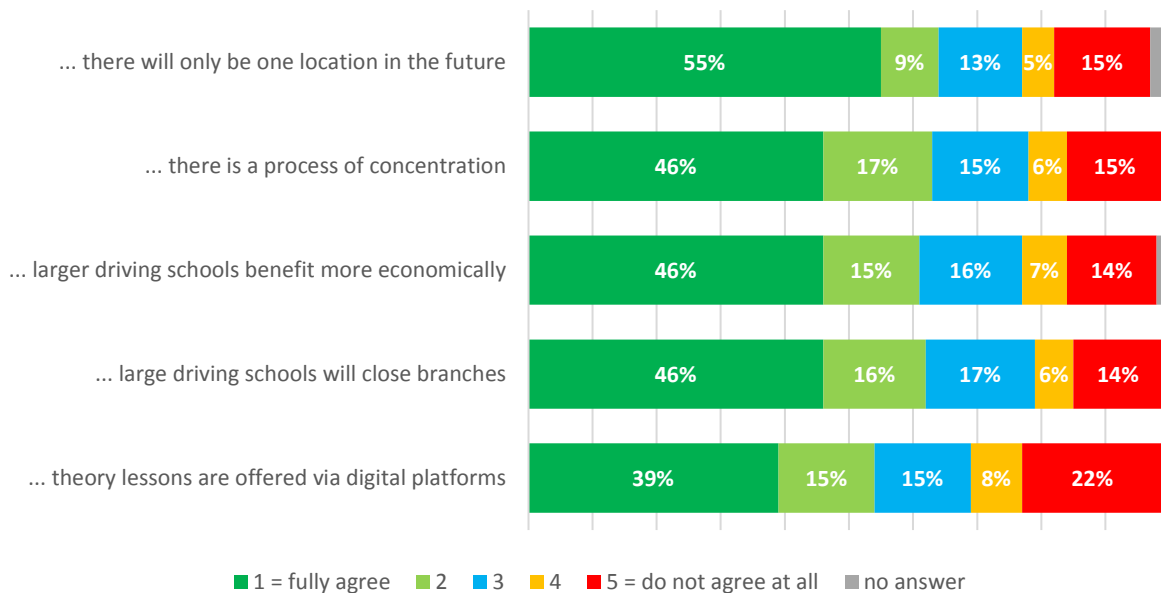
Future prospects Classroom teaching

But what are the supply, use and preference of theory classes after the pandemic? MOVING also investigated this question and obtained a clear result in August 2022. Almost two-thirds (66 %) are in favour of pre-service training only, with e-learning support desired. This is followed by the mixed form, i.e. blended learning, with 19 percent, and only ten percent of all driving schools rely exclusively on online instruction. This is due to the fact that face-to-face lessons are considered more suitable in all aspects, especially because of the exchange of information (75 %), the possibility to ask questions (72 %) and the teaching of correct traffic behaviour (68 %).

Risks of online-only teaching

The majority of driving schools (64 %) fear that a pure theory course will force the development towards a single location. The fear of a concentration process is great (63 %), and especially the small driving schools believe that larger and larger driving school units or driving school chains could then take over the business. According to the driving instructors, the large driving schools will profit more economically from purely online theory lessons (61 %) and it is suspected that many will close their branches (62 %). Furthermore, 54% of driving schools expect that theory lessons will then only be offered via a digital platform.

Increased online theory teaching as a substitute for or supplement to face-to-face teaching leads to the following



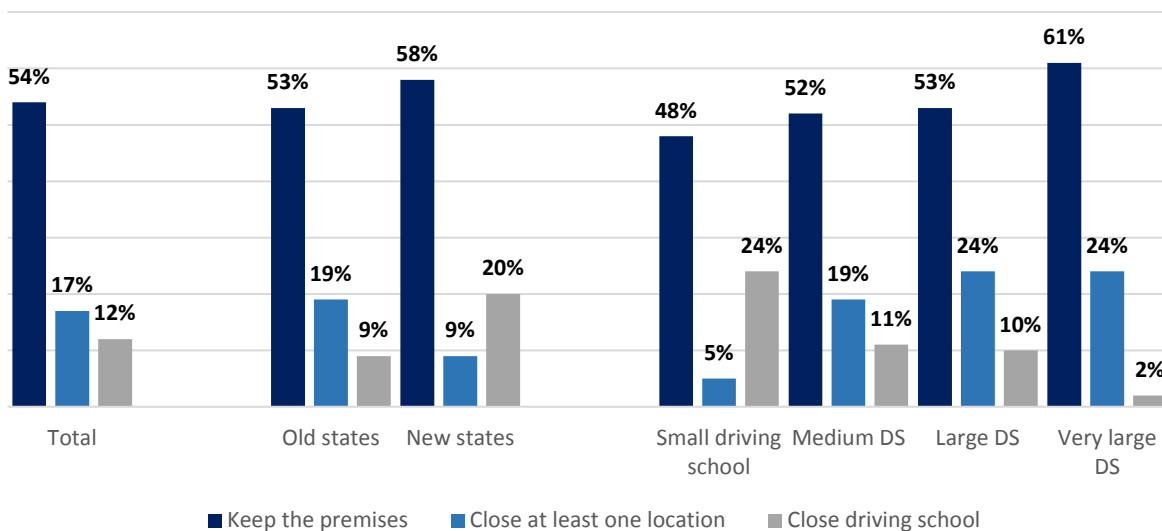
Source: MOVING Driving School Market, 2022_2

THEORY LESSONS

Almost a third of driving schools (29 %) assume that they will be able to driving school (12 %) or at least one location (17 %) in the event of 100% online theory lessons. close at least one location (17 %). would close. This could lead to a significant reduction in training provision in rural areas in particular: 37% of rural driving schools would either close the driving school or at least one location. Small driving schools with an annual turnover of up to 100,000 euros are particularly affected by the closure of driving schools: 24% state that they will close their driving school. In the new federal states, one in five driving schools (20 %) would take this step and give up the driving school. However, even the large driving schools with an annual turnover of 250,000 euros or more are tending towards offering 100 percent of their theory lessons online in

the future, or may also be offered via platform providers, close at least one location. 24 percent stated in the survey that they would take this economic step, and this tendency is much more pronounced in the old federal states than in the new federal states. than in the new federal states. In many cases, face-to-face theory lessons are vital for the economic situation of driving schools situation of driving schools, as one in four driving schools fears that in the case of driving schools fear that basic fees will fall in the event of purely online theory lessons. A total of seven percent assume assume that the basic amount will be reduced by up to 25 percent, while a further twelve percent of driving schools even fear a reduction of up to 50 percent and six percent even fear a reduction of more than 50 percent.

In the event that theory classes are delivered 100 per cent online by you or a platform provider in the future, what will you do with the premises?



Source: MOVING Driving School Market, 2023_1

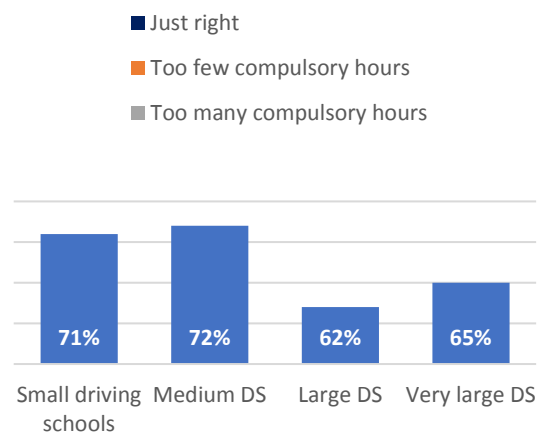
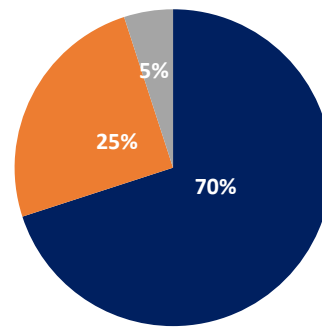
THEORY LESSONS

There are serious reasons for the rejection of purely online theory lessons. 79 percent of the driving schools expect a loss of quality in training. This opinion is shared by both small driving schools with an annual turnover of up to 100,000 euros (79 %) and large driving schools with a turnover of up to 500,000 euros (85 %). Seventy per cent of the driving schools consider the current number of theory hours to be just right; only 25 per cent are of the opinion that the number of compulsory hours is too low. 32 per cent of the very large driving schools of this opinion. In order to maintain the quality of the training, the driving schools are in favour of 79 percent of the content of the theory lessons having to be offered in classroom form. This corresponds to about 11 of the 14 compulsory hours for learner drivers. Only four percent believe that no classroom content is required. Despite the good quality of the theory lessons, 40 percent of the driving schools think that there are topics that are missing from the curriculum and that should be covered additionally. Among other things, topics such as e-mobility and driver assistance systems are missed.

Scientific evaluation

In his expert opinion, Prof. Dr. Dr. Manfred Spitzer from the University of Ulm believes that efforts to offer theory lessons only as digital distance learning are not expedient. „The discussion of the learning processes that are essential for obtaining a driving license makes it clear that digital distance learning cannot replace face-to-face instruction. In addition, the Highway Code primarily regulates interaction with other road users, which ultimately concerns human social behavior.“ Social behavior can only be learned by interacting with one another - in the real world and not in virtual space.

Is the number of hours in theory classes sufficient?



Source: MOVING Driving School Market, 2023_1

Studies on the effects of digital information technology on learning processes have shown that it has a clearly negative impact on learning. „This applies in particular to the learning of young people from less educated and/or economically disadvantaged psychosocial backgrounds. Therefore, also with regard to the demand for equal opportunities for participation in social community life, the replacement of face-to-face face-to-face teaching with digital distance learning is problematic: the socially and economically disadvantaged the most,“ explains Dr. Spitzer.

OFSA II

Approaches to optimising driver training in Germany (OFSA II)

The BASt research and development project „Approaches to optimising driving training in Germany“ began back in 2012. (OFSA I) began in 2012 in order to initiate a further development of driving licence training. In 2019, the scientific basis for the reform of driving training was continued with the OFSA II project. Here, a training concept for future driver training in category B was developed.

During the actual analysis by the Institute for Applied Family, Childhood and Youth Research at the University of Potsdam under the direction of Professor Dr. Dietmar Sturzbecher, it was found, among other things, that the majority of learner drivers do not work on all content areas in theory lessons. This means that certain lessons are often completed several times, while other lessons are not completed at all. 60 percent of learner drivers do not complete all twelve lessons of the basic material. This means that they are less likely to pass.

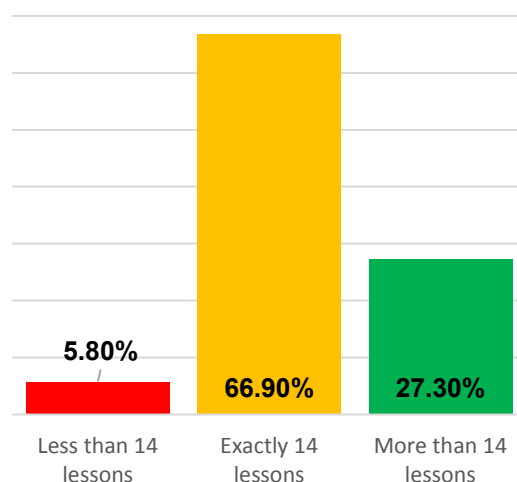
Professor Dr. Sturzbacher points out that the learner driver training regulations do not currently clearly specify whether first-time learner drivers in category B only have to complete twelve double lessons of basic material and two double lessons of category-specific additional material in category B, regardless of the topic, or whether it must be ensured that each learner driver has completed each theory lesson once. There are also different interpretations of this in the driving school monitoring systems of the individual federal states. For this reason, data regarding the completion of theory lessons was analyzed.

HARDFACTS

- » **94,2 percent of the first-time students complete at least 14 theory sessions.**
- » **Green learning status increases the probability of passing to 95 percent.**
- » **Only a good third reach learning status green for the exam.**

The data basis was formed by all first-time category B licence holders who were admitted to the theory test and for whom the driving instructor had marked at least one theory lesson as „completed“. The data analysis showed that 94.2 percent of first-time category B licence holders had completed at least 14 theory lessons. While 66.9 percent of the learner drivers attended exactly 14 theory lessons, 27.3 percent of the learner drivers attended more than 14 theory lessons. The majority of the latter group attended 15 or 16 theory lessons.

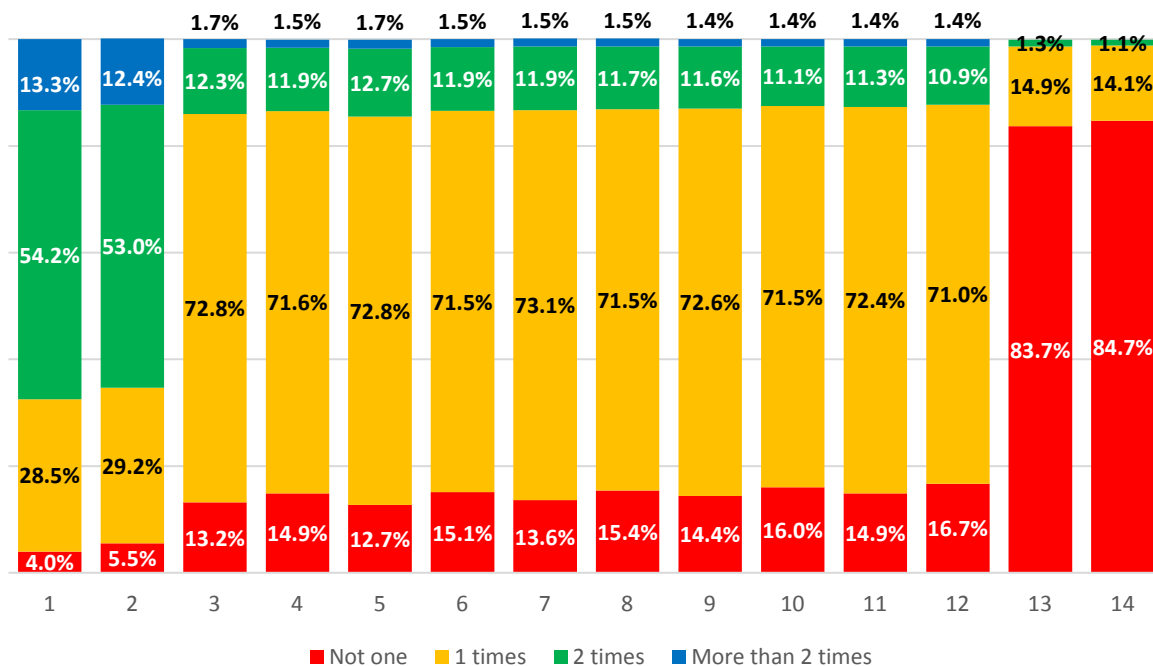
How many theory lessons completed ?



Source: OFSA II

OFSA II

How often did the learner drivers attend the theory lessons?



Source: OFSA II

5.8 percent of the learner drivers completed fewer than 14 lessons, according to the data provided by the driving instructors. Participation in all the different theory lessons of the basic material was found to improve the probability of passing the test statistically significantly. Learners who attended all twelve different lessons of the basic material were more likely to pass the first theoretical driving test than learners who attended individual lessons more than once and omitted other lessons.

Preparation with an app

By means of an app, the student's learning progress can be tracked and a traffic light system shows the learning status. This software is especially designed for training the officially released test tasks of the Theoretical Driving Licence Examination.

As with the traffic light, red means a poor level of knowledge, which means a probability of passing of only 39 per cent. If the traffic light is yellow, the probability increases to 78 percent, and if the learning status has reached green, the chance has grown to 95 percent. A study shows that only about one third (34.3 %) of examinees have the learning status green at the first theoretical examination, 57.4 percent are at yellow and 8.3 percent actually go into the examination with a red traffic light and thus with large gaps in their knowledge. This is why OFSA II demands that the monitoring of learning progress be made mandatory. This must be better supported by the provision of suitable methods and instructions. Driving instructors can view the learning status of their students at any time via the app and should only complete theory training when the traffic light status has reached green and the preliminary examinations have been successfully completed.

PASS RATE OF THE DRIVING TEST

Pass rate

The Federal Motor Transport Authority publishes the current statistics every year, which provide information on the results of the theoretical and practical driving tests. The most important category is, of course, driving licence class B, but the other categories are also included. After Corona had reduced the number of tests in 2020, the trend has since been on the rise again. In 2021, 1,734,396 theoretical and 1,646,107 practical examinations were taken. The positive trend has continued in 2022, so that the numbers are roughly back at the pre-Corona level, with 1,811,053 theoretical examinations taken.

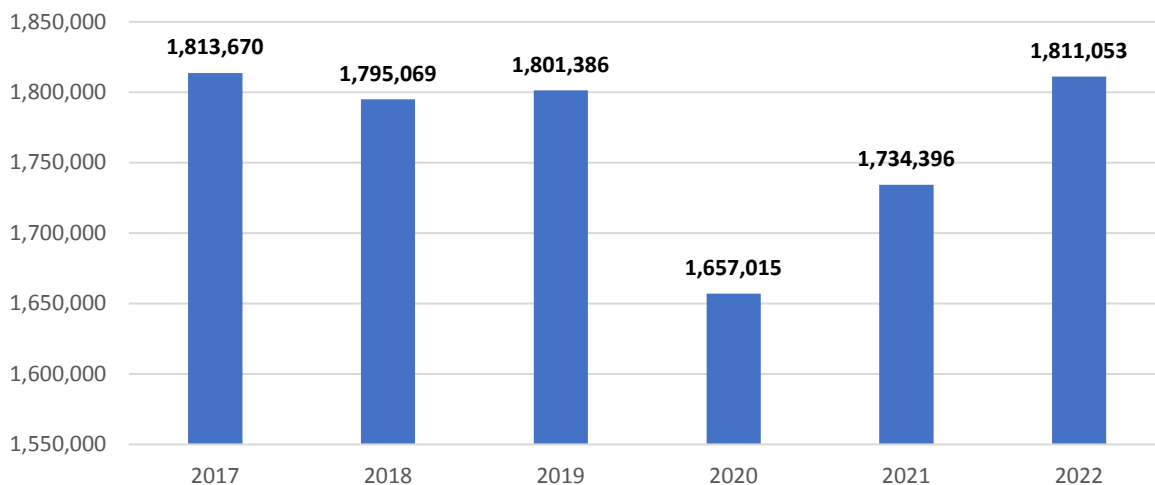
Correspondingly, the number of examinations in driving licence class B has also increased again, and in 2021 the number of theoretical examinations was again 1.5 per cent higher than in the Corona year, and the number of practical examinations was even 6.5 percent higher. In 2022, a further increase in the number of examinations is to be recorded.

HARDFACTS

- » The number of examinations is back to the level before the corona-crisis.
- » Pass rates have dropped slightly since 2019.
- » The density of passenger cars is continuously increasing.

In the first three quarters of 2022, the number of practical driving tests carried out in Germany increased by 14 percent to 1.31 million compared to the previous year, according to current calculations by the TÜV Association. As before, test takers who have used accompanied driving to prepare for the test are doing better. While learner drivers without accompanied driving have a failure rate of 40.6 per cent, this drops to 24.5 percent with BF17. Or to put it positively, three quarters pass the practical test with BF17.

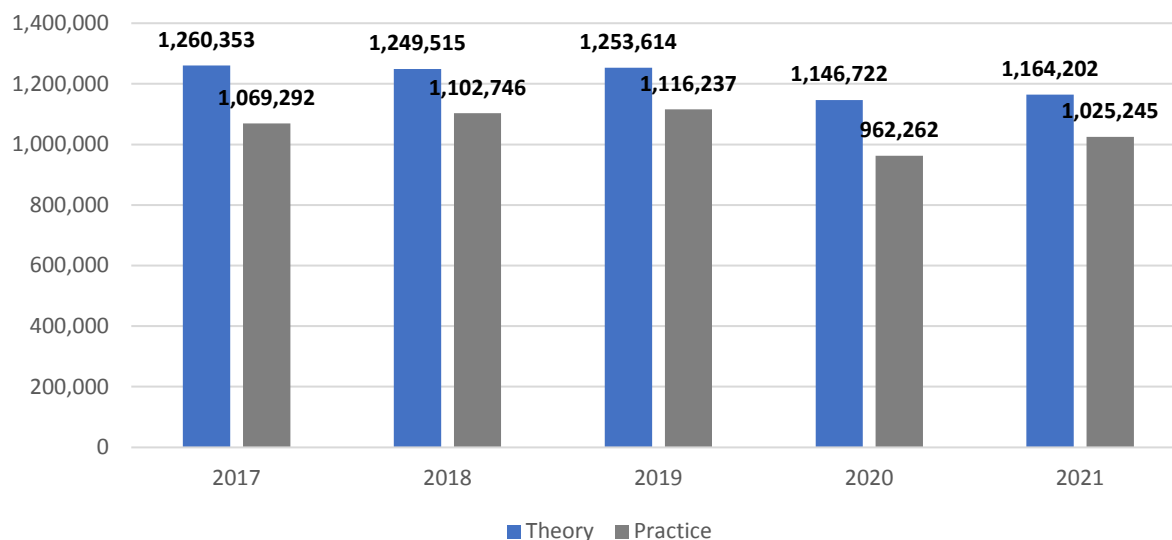
Number of theory tests in all driving licence categories, 2017 to 2022



Source: TÜV | DEKRA arge tp21 GbR, 2023

PASS RATE OF THE DRIVING TEST

Theoretical and practical examinations in driving licence class B, 2017 to 2021

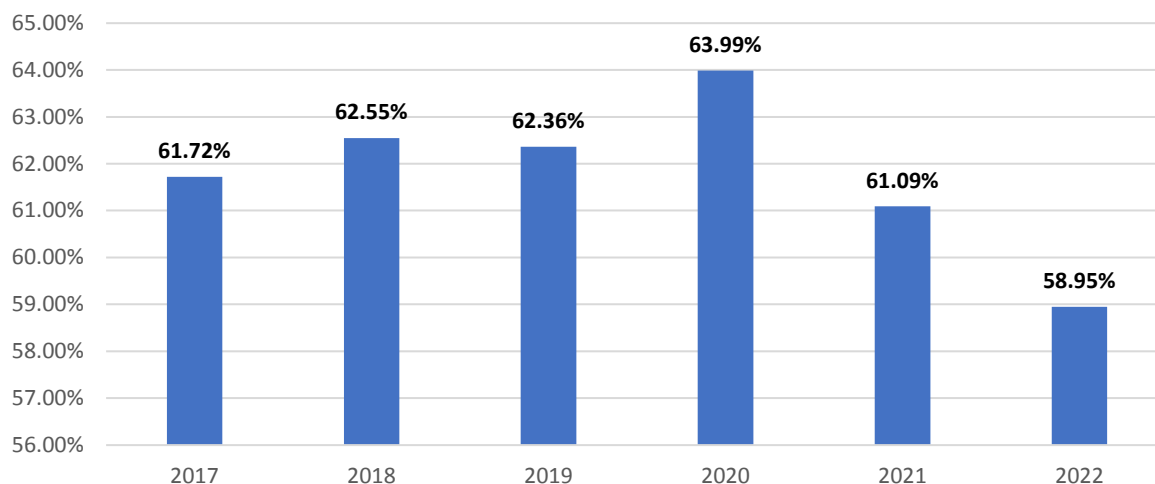


Source: Federal Motor Transport Authority, Flensburg, statistics tests, 2022

However, there is also a downside to this positive development, as the number of tests passed is falling slightly. While 29 % of all learner drivers failed the theory test in 2013, the figure was 36.7 % in 2021 - and even 41.05 % in driving license category B. In the coronavirus year 2020, the pass rate had risen briefly and was almost 64% in driving license category B. Proponents of distance learning attributed this to online lessons,

without taking into account that the total number of tests was significantly lower and the population of test candidates and thus the probability of success was exceptional. Those who took the driving test despite the unfavorable conditions were significantly more motivated and determined. All learner drivers are required to attend 14 theory lessons in order to be admitted to the test.

Pass rate for theoretical examinations in driving licence category B, 2017 to 2022



Source: TÜV | DEKRA arge tp21 GbR, 2023

PASS RATE OF THE DRIVING TEST

Foreign language examinations class B

A look at the foreign language examinations shows that the best pass rates have been recorded in Russian for many years. However, the rate fell below 70 per cent for the first time and is now only 68.41 percent, which is still more than seven per cent above the average pass rate for all languages. After German with 1,166,907 written examinations in driving licence class B, examinations in High Arabic are in second place with 94,956 participants. However, the number is declining and was still 146,472 in 2018.

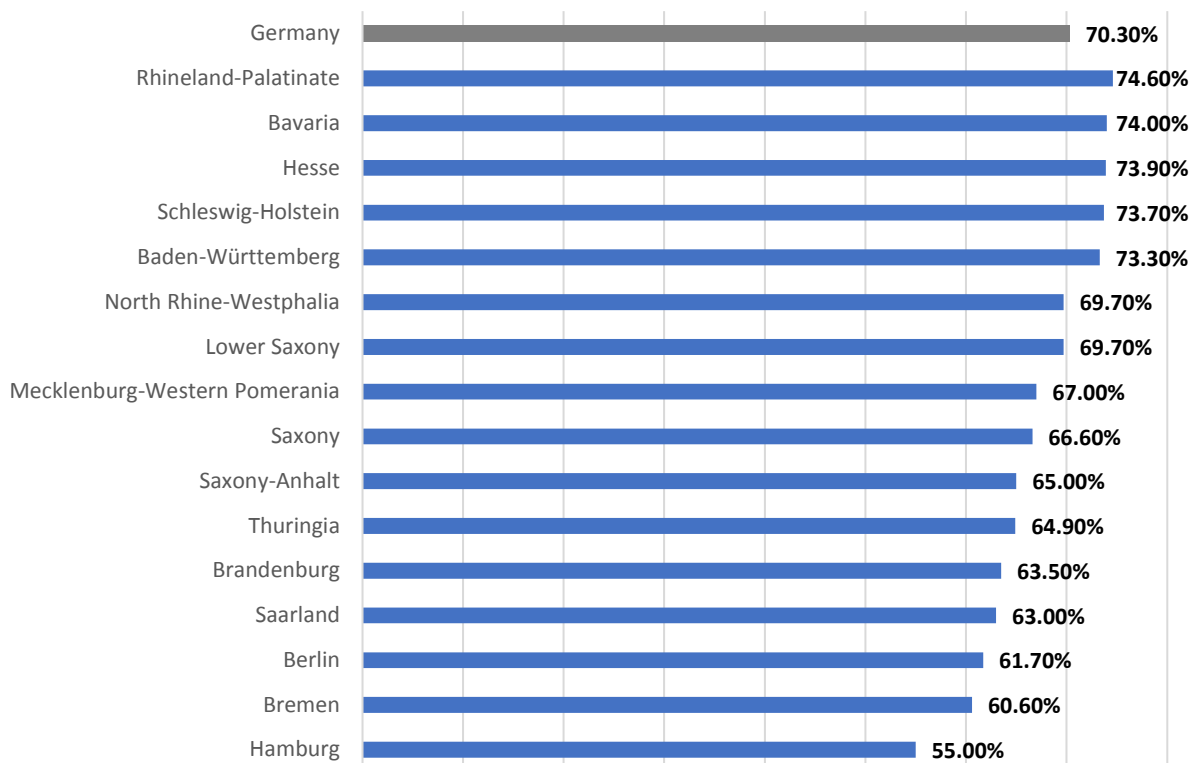
Pass rate in the federal states

There are certainly differences between the various federal states, both in the theoretical and practical examinations.

Schleswig-Holstein has the highest pass rate for the theory test at 68.5 %, which is 5.2 % above the national average (63.3 %). 5.2 percent above the national average (63.3 %). Hesse (68.1 %) and Hamburg (68 %) are also ahead. In last place are Saxony-Anhalt with 56.3% and Berlin with 56.9%.

In the practical examination, the results in the federal states look quite different. With a pass rate of 74.6 percent, Rhineland-Palatinate takes first place, ahead of Bavaria with 74 percent and Hesse with 73.9 percent. While Hamburg was at the top in theory, the Hanseatic city is in last place in this area with only 55 percent of examinations passed. The city states are in last place overall, as Bremen with 60.6 percent and Berlin with 61.7 percent also have weak rates.

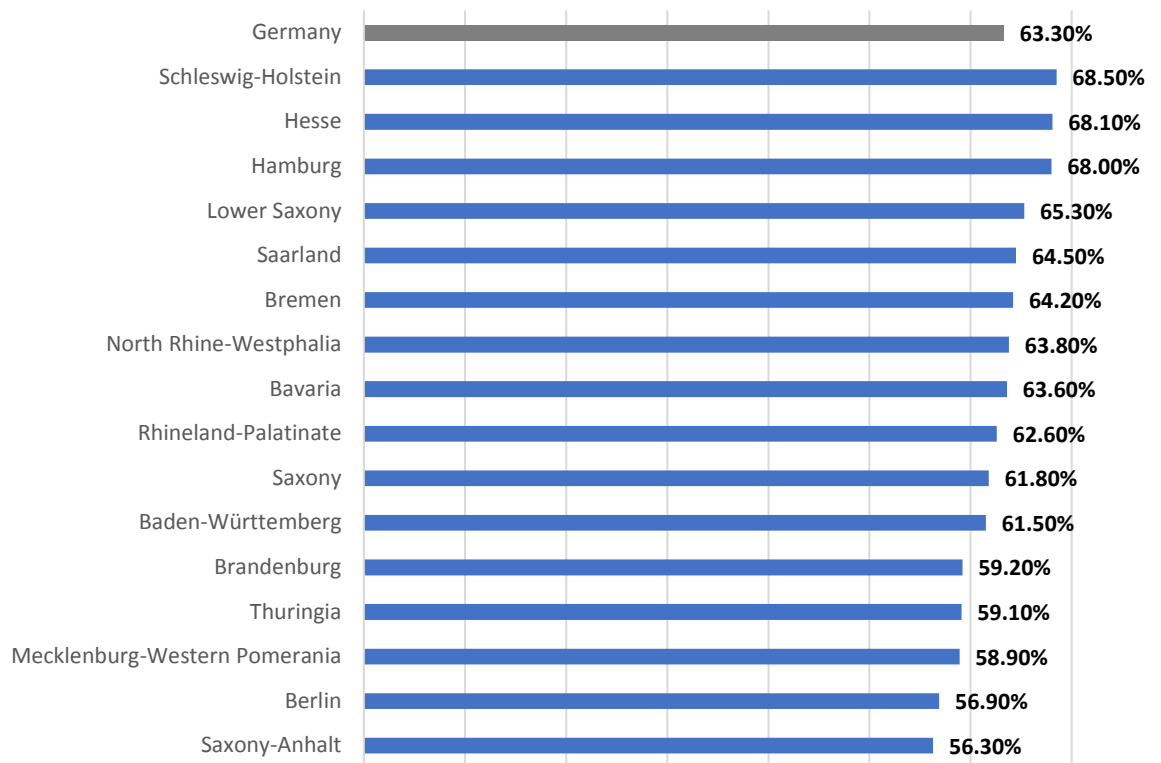
Pass rates prakt. Examinations all vehicle categories by federal state 2021



Source: Federal Motor Transport Authority, Flensburg, Statistics Examinations, 2022

PASS RATE OF THE DRIVING TEST

Pass rates for theor. examinations for all vehicle categories by federal state 2021



Source: Federal Motor Transport Authority, Flensburg, Statistics Examinations, 2022

Reasons for low pass rates

But what are the reasons for the low pass rates? Many learner drivers do not go into the test adequately prepared or have not attended all the theoretical lessons. From MOVING's point of view, they should be required to complete all 14 lessons and only take the test when their learning app shows the green light in the mandatory pre-test. On the other hand, traffic is increasing all the time, making it more and more

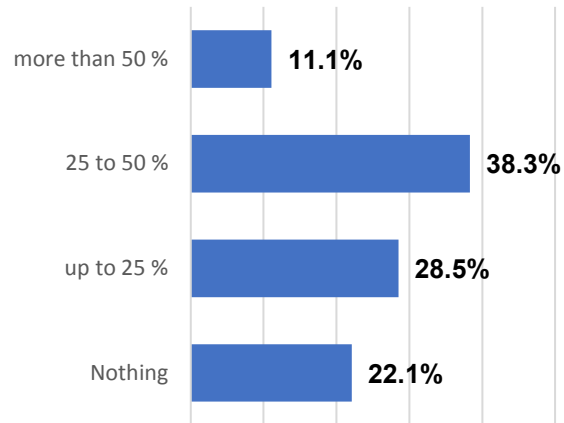
difficult to keep an eye on everything at the same time. to keep an eye on everything at the same time. This is a major problem for novice drivers in particular, and traffic is especially difficult to master in large cities. This is also shown by the pass rates in the city states. Over the past ten years, car density has increased from 517.4 vehicles per 1,000 inhabitants to 580.2 vehicles.

EFFECTS OF CORONA

Impact of Corona

The corona pandemic affected all areas of life and had a negative impact almost everywhere. For driving schools, 2020 was a real challenge, with lockdowns, distance learning and declining enrolment numbers all causing problems. According to a MOVING survey in October 2020, 9.3 percent of the driving schools surveyed even had to close a branch. 21.1 percent stated that they had not been able to compensate for the restrictions imposed by Corona. Many driving schools had to accept losses in turnover, which in a further MOVING survey in April 2021 were reported by 28.5 percent with up to 25 percent and by 38.3 percent with up to 50 percent. 11.1 per cent even reported a loss of more than 50 percent in turnover. In order to absorb the personnel costs, 72 percent of the driving schools used the concept of short-time work. In the meantime, there are no longer any restrictions due to Corona and the figures have recovered significantly. Accordingly, the driving school industry is optimistic about the future; only 18 percent expect a decline in turnover, according to the current MOVING survey from January 2023. The issue of Corona is thus probably off the table for the time being. But the effects will not only affect the driving schools, but also the learner drivers.

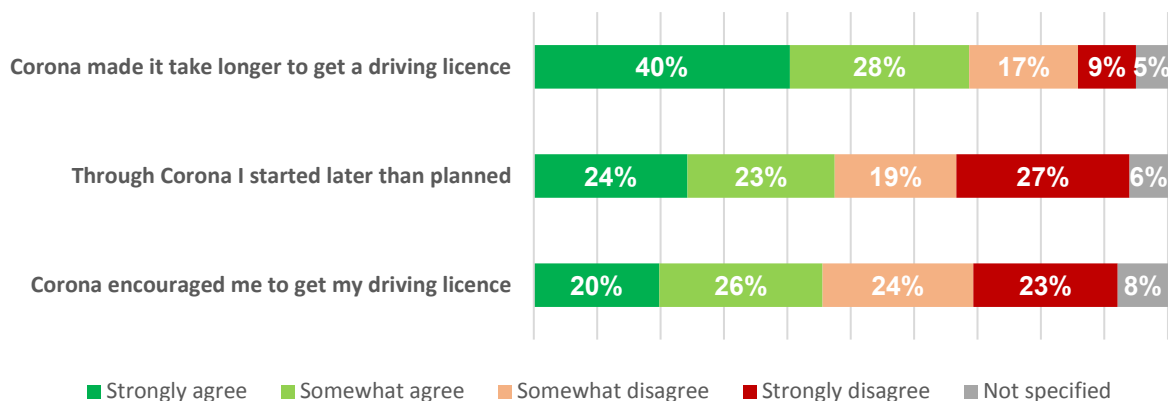
Decline in annual turnover 2020



Source: MOVING survey, April 2021

The MOVING Trend Study 2022 shows that the majority of respondents (84 %) would have taken their driving licence independently of Corona. However, it had taken longer (68 %) due to the pandemic, and 47 % of the respondents had started with their driving licence later than they had intended. The fear of infection in public transport even encouraged 46 percent of the learner drivers to take out a driving licence in order to become independent of public transport. This is also shown by the fact that despite rising costs, the popularity of the car is still unbroken. 72 percent appreciate the flexibility and 46 percent cannot imagine life without a car.

Did Corona affect your driving licence?



Source: MOVING learner driver survey, 2022

GUEST CONTRIBUTION



Marc-Philipp Waschke

Driving licence, fitness to drive and road safety officer
TÜV Association e. V.

Number of driving tests at record level

Obtaining and holding a driving licence is of great importance in our society and economy. With the acquisition of a driving licence, it is possible to participate in motorised road traffic. As a rule, this also entails the possession or use of a motor vehicle. For many people in Germany, a driving licence and the availability of a motor vehicle still give them a better chance of finding a training place or a job. A representative Forsa survey commissioned by the TÜV Association shows how important the driving licence continues to be for individual mobility despite the climate crisis, the bicycle boom and the nine-euro ticket. 63 percent of the surveyed driving licence holders over the age of 16 drive (almost) daily, another 23 percent at least once a week. There are clear differences here between urban and rural areas. In municipalities with less than 5,000 inhabitants, 78 percent drive a car every day, whereas in cities of 500,000 inhabitants or more, only 39 percent do. A good half of those surveyed have taken out a driving licence to get to their own workplace or training place (51 percent). In the very rural regions, 62 percent said this and in the metropolises 33 percent. The second-ranking reason for obtaining a driving licence, with a share of 47 percent, is personal circumstances that require, for example, transporting children by car. As many as 46 percent say that there is a lack of alternative mobility options to their own car in their area. Here, the differences between urban and rural areas are particularly large: 73 percent of the inhabitants of towns with less than 5,000 inhabitants state that the lack of mobility alternatives is the reason for acquiring a driver's licence, but only 16 percent of towns with 500,000 inhabitants or more. It becomes clear that the importance of the driver's licence increases the smaller the cities and towns become.

Important step towards independence

Acquiring a driving licence is an important step towards an independent life for young people. The trend of the pre-Corona years towards more and more driving tests is continuing. The number of driving tests in Germany has reached a new high. In 2022, 1.76 million practical driving tests for driving licences of all classes were carried out. That is around 110,000 exams or 6.7 percent more than the year before.

GUEST CONTRIBUTION

The previous peak value of 1.74 million tests in 2019 was exceeded by around 20,000 practical tests. This is shown by current data from the TÜV Association based on surveys by TÜV | DEKRA arge tp 21. In 2022, the test centres took more practical driving tests than ever before. According to the data, learner drivers also took 1.81 million theory tests in 2022, an increase of around 91,000 compared to the previous year (plus 5.3 percent). The driving licence examination system has proven its performance even when the examination capacities are fully utilised and under more difficult corona conditions such as high sick leave and long isolation obligations. The absolute figures also show how popular the driving licence is: As of 1 January 2022, the number of driving licences of all classes in Germany was 44.9 million. That was 12.6 million more than in 2013 (plus 39 percent). Passing the driving test still marks an important milestone in the lives of young people. In the TÜV survey commissioned by Forsa Politik- und Sozial- forschung GmbH, 72 percent of German citizens aged 16 and over said that obtaining a driving licence was as much a part of growing up as graduating from school or g e t t i n g t h e i r first flat. 16 percent of the respondents are of the opposite opinion and eight percent are undecided.

Continuously develop the driving licence system

The technical inspection bodies are obliged to meet the respective demand and to ensure a nationwide range of tests in Germany. The respective population density of the region is decisive for the capacity utilisation of the local technical inspection body. A long-term analysis of the population development between 1990 and 2019 clearly shows regional differences. Districts and independent cities with double-digit population gains contrast with districts with double-digit population losses. The responsible bodies of the technical inspection bodies h a v e always reacted appropriately and ensured nationwide provision by responding to this population development on behalf of the Länder in accordance with their obligation to provide a sufficient number of professionally qualified and reliable personnel and their disposition for the performance of driving licence examinations.

GUEST CONTRIBUTION

According to the results of the TÜV survey, German citizens are also satisfied with the driving test system. Two out of three respondents believe that the German system has proven itself and should remain unchanged (66 percent). And 77 percent are in favour of driving training and driving tests continuing to be carried out by different institutions. It is particularly important to the respondents that the examiners are objective and neutral (76 percent). Fairness in the assessment of driving competence is in second place (69 percent) and the expert knowledge of the examiners in third place (56 percent). For only 14 percent consider the rapid availability of test dates and the lowest possible costs to be particularly important. Ultimately, it remains a joint effort to minimise the risks for young drivers and thus improve road safety. Preparing novice drivers for independent motoring continues to play an important role in this. At the same time, the successful acquisition of a driving licence increasingly implies a commitment to lifelong learning as a driver in road traffic.

Marc-Philipp Waschke
Driving licence, fitness to drive
and road safety officer
TÜV Association e. V.

ACCOMPANIED DRIVING BF17

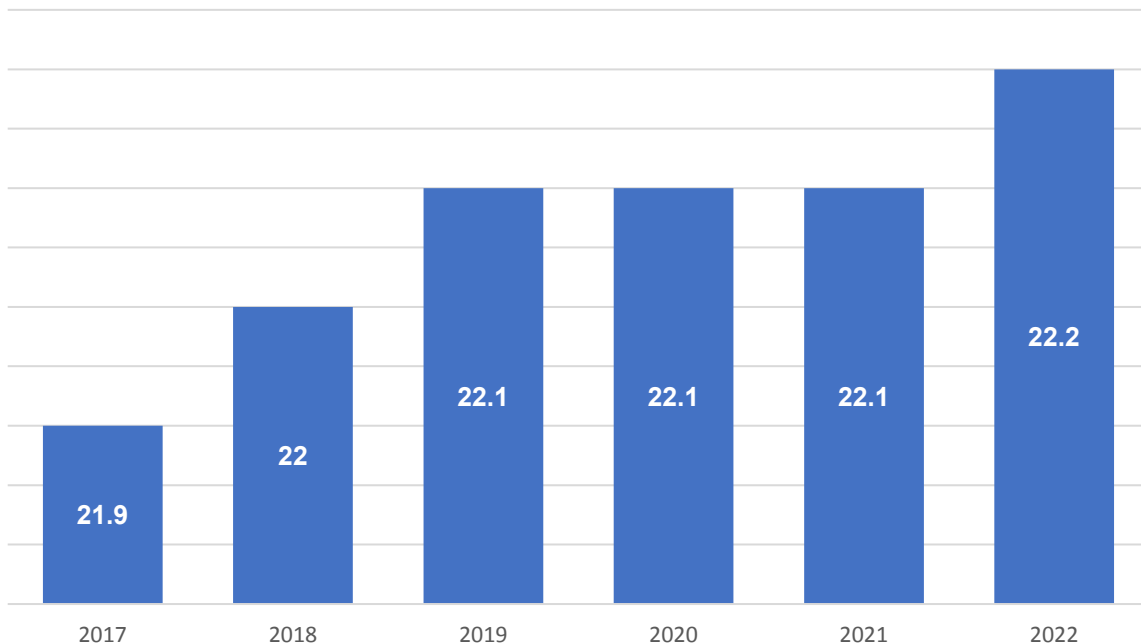
Average age of the applicants when passing the theoretical test class B

Accompanied driving from the age of 17 is a real success story. According to the website of the Federal Ministry for Digital and Transport, the minimum age for obtaining a category B and BE (passenger car) driving license can be lowered to 17 by participating in „accompanied driving from the age of 17“ (BF17), combined with the requirement that the vehicle may only be driven until the 18th birthday when accompanied by a named „roadworthy“ person. The BF17 thus follows on from the professional training provided by driving schools. According to the ADAC, „accompanied driving from 17“ for driving license categories B and BE can demonstrably significantly reduce the risk of accidents for novice drivers.

The results of pilot tests show that the participants in a study caused 28.5 percent fewer accidents, thus significantly increasing safety, especially in the young age group.

Accordingly, driving schools have also adapted to BF17, which was launched as a pilot project in Lower Saxony in 2004. The regulation has been in force nationwide since 2010 and has been accepted by many young driving licence applicants. However, while the average age of applicants including BF 17 for passing a theory test in category B was still 19.9 years in 2010, this has successively increased over the years. In 2017 it was already 21.9 years and in 2022 22.2 years.

Average age of applicants when passing the theoretical test for driving licence class B, 2017 to 2022



Source: TÜV | DEKRA arge tp 21 GbR, 2023

ACCOMPANIED DRIVING BF17

Here again there are strong regional differences in the individual federal states, but above all an urban-rural divide. Especially in the big cities, the public transport system and the difficult traffic situation seem to make it less attractive to get a driving licence at a young age.

Accordingly, the average age in the large cities is significantly higher than in the large states. In Berlin, the applicants for the theoretical examination are already 25.8 years old on average, in Hamburg 24.7 and in Bremen 24.4. They are youngest in Bavaria with 21.2 years.

Passing age TFEP including BF17 by federal state from 2018 to 2022

	2018	2019	2020	2021	2022
Baden-Württemberg	21.4	21.6	21.3	21.4	21.3
Bavaria	21.1	21.2	21.1	21.2	21.2
Berlin	25.4	25.7	25.8	25.6	25.8
Brandenburg	21.9	22.0	21.6	21.8	21.4
Bremen	24.4	24.3	24.2	24.2	24.4
Hamburg	24.8	24.9	25.1	25.0	24.7
Hesse	22.4	22.5	22.4	22.5	22.4
Mecklenburg-Western Pomerania	22.2	22.2	21.7	21.4	21.6
Lower Saxony	21.7	21.8	21.6	21.8	21.8
North Rhine-Westphalia	22.5	22.6	22.4	22.6	22.6
Rhineland-Palatinate	21.8	21.9	21.7	21.8	21.8
Saarland	23.1	22.8	22.2	22.3	22.6
Saxony	21.6	21.9	21.6	21.4	21.3
Saxony-Anhalt	22.4	22.3	22.2	21.7	21.9
Schleswig-Holstein	21.8	21.9	21.8	21.7	22.0
Thuringia	21.7	21.6	21.3	21.0	21.3
Germany	22.0	22.1	22.1	22.1	22.2

Source: TÜV | DEKRA arge tp 21 GbR, 2023

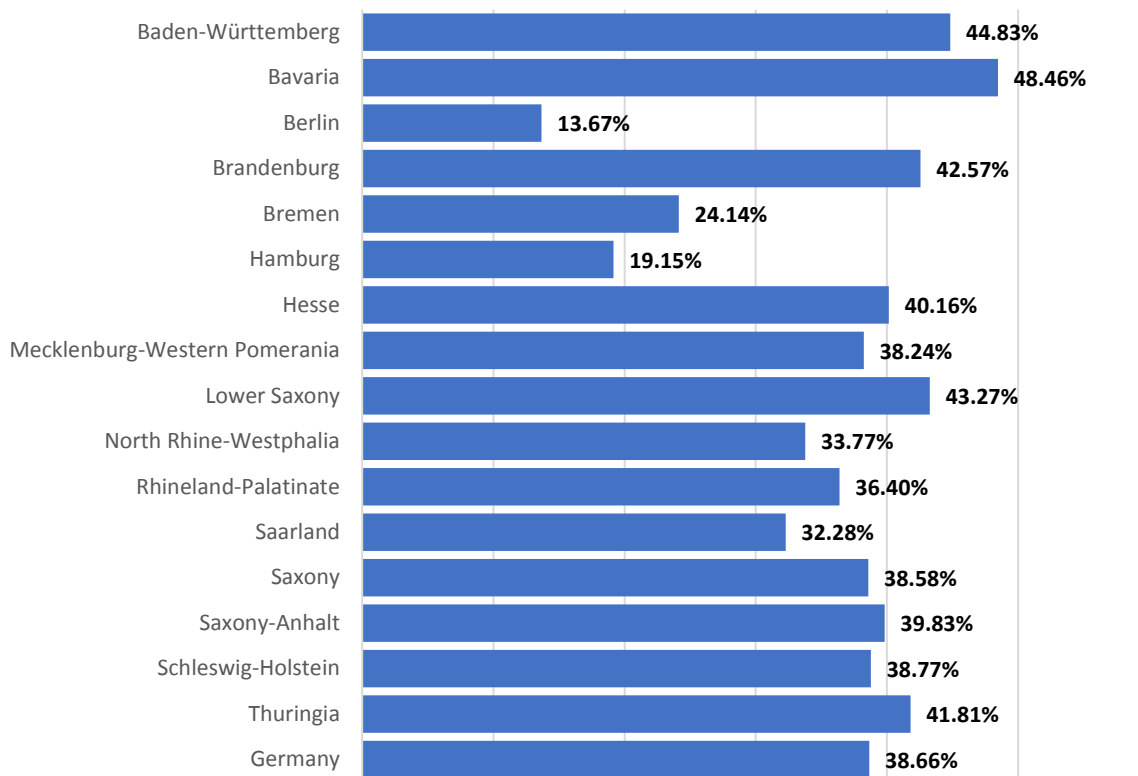
Explanation: The green marking means that the federal state is equal to or below the national average. Correspondingly, the red marking means that the federal state is above the national average.

ACCOMPANIED DRIVING BF17

It is also interesting to take a look at the proportion of BF 17s in all passed theoretical examinations. As expected, the trend described above is confirmed here, as the share in Berlin is only 13.67 percent and in Hamburg 19.15 percent.

The leader in this category is Bavaria with 48.46 percent, followed by BadenWuerttemberg with 44.83 percent. In these states, almost every second applicant participates in accompanied driving.

Proportion of applicants with BF17 in passed theoretical examinations 2022



Source: TÜV | DEKRA arge tp 21 GbR, 2023

LEARNER DRIVER SATISFACTION

Student driver satisfaction

In order to be able to map the opinion of learner drivers in addition to the numerous official and quantifiable data, MOVING has been regularly conducting representative learner driver surveys since 2017. This survey, which is unique in Germany, provides detailed results regarding the satisfaction of learner drivers with their training at driving schools. The survey was conducted again in 2022 and further modified in order to obtain even more detailed assessments.

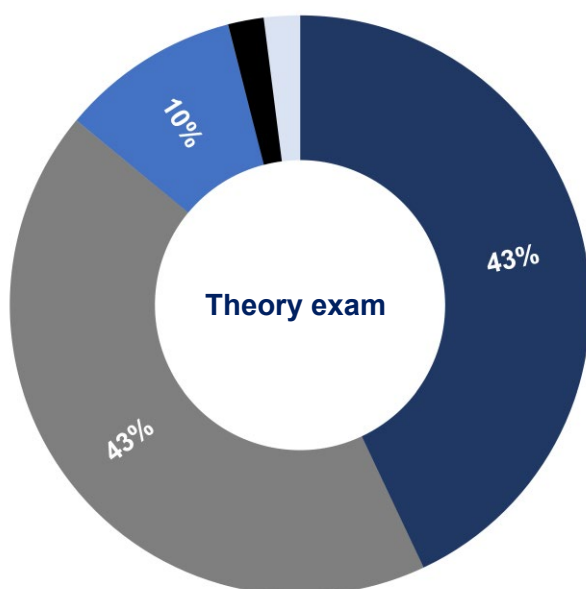
The results are still very pleasing for the driving schools and prove how well the work is done on site. A total of 86% rated the preparation for the theory test provided by the theory lessons as positive,

HARDFACTS

- » Over 80 percent of all learner drivers rate the training positively.
- » The location of the driving school is an important decision criterion.
- » Three quarters of the respondents would like to have an on-site consultation.

namely very good (43 %) or good (43 %), with only twelve percent finding it inadequate. The other questions were also answered almost identically, as 84% felt very well (42 %) or well (42 %) prepared by the practical training, with only eleven percent seeing deficits here.

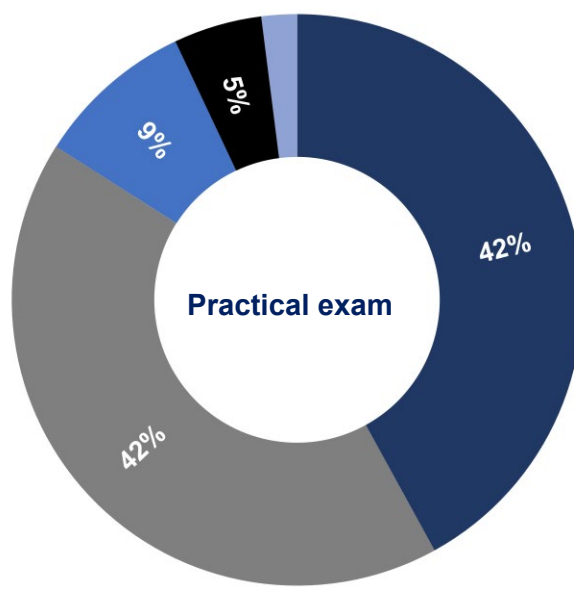
How well do you feel prepared for the theoretical exam by the theory lessons?



- Very good
- Rather good
- Rather bad
- Very bad
- Not specified

Source: MOVING learner driver survey, 2022

How well do you feel prepared for the practical exam by the practical lessons?



- Very good
- Rather good
- Rather bad
- Very bad
- Not specified

Source: MOVING learner driver survey, 2022

LEARNER DRIVER SATISFACTION

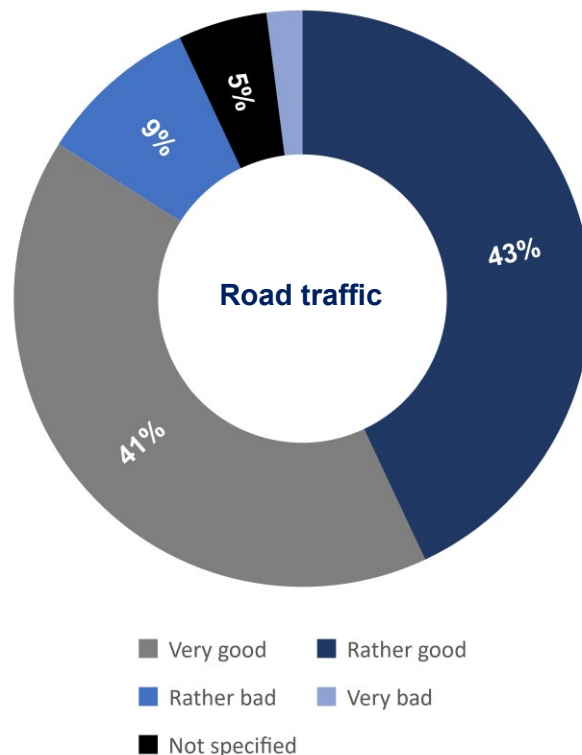
Overall, 83 percent of the learner drivers rated the preparation for participating in road traffic as positive - very good (41 %) and good (42 %).

On an even more differentiated scale, a good two-thirds were (very) satisfied with their driving school overall, with the friendliness of the instructors and staff receiving particular praise. On average, good marks were also given for the counselling interview prior to registration, and even the website was rated good to very good by almost 60 percent of the respondents.

Overall, the theory lessons are rated as good as the driving school itself, and the e-learning offer is viewed particularly positively. 45 percent are very satisfied with it, another 29 percent think it is good. Only eight percent give the school marks 5 and 6, resulting in an excellent average grade of 1.9. The assessment of the online theory course is somewhat worse, but still good, with two thirds of the respondents perceiving it as very good or good and receiving an average grade of 2.2.

The overall grade for practical instruction is slightly lower than for theory, with an average grade of 2.2. Almost two-thirds give grades 1 and 2, and a further 17 per cent give a 3. Around 60 per cent are also (very) satisfied with the flexibility in the choice of dates, with the contingent of available driving lessons and with the quality of the feedback from the driving instructors.

How well do you feel prepared for road traffic by the practical lessons?



Source: MOVING learner driver survey, 2022

The learner drivers are also satisfied with the internet presence of the driving schools, which 26 percent describe as very good and 33 percent as good. 16 percent still give it a satisfactory rating, which means that a total of three quarters of all driving schools make a good impression online. Only a very few websites are perceived as inadequate by learner drivers.

LEARNER DRIVER SATISFACTION

How satisfied are you overall with your driving school?



How satisfied are you with the friendliness of the driving instructors and staff?



How satisfied are you with the pre-registration counselling interview?



How would you rate the internet presence of your driving school?



■ Very good ■ Good ■ Satisfactory ■ Sufficient ■ Poor ■ Insufficient ■ No information

Source: MOVING learner driver survey, 2022

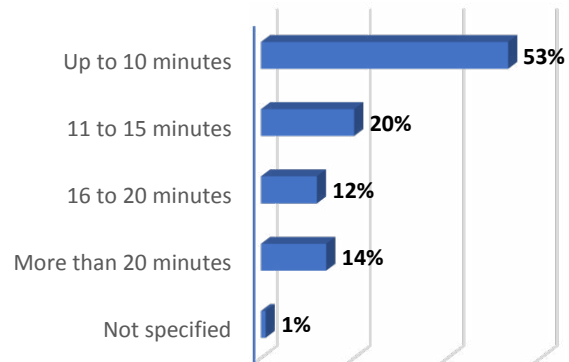
LEARNER DRIVER SURVEY

Learner driver survey

What are the main reasons for choosing a driving school? First and foremost, the distance to the driving school is an important criterion for 58% of those surveyed, as learner drivers do not want to have to travel excessively long distances to theory lessons. The current average journey time is 14 minutes, with over half (53 %) even needing less than ten minutes to get to their driving school. Only 14 % have to put up with a journey time of more than 20 minutes. These figures are significantly lower than the maximum acceptable journey time, which was surveyed by MOVING this time. Here, an average of 25 minutes is accepted, with eleven percent even finding more than 30 minutes acceptable.

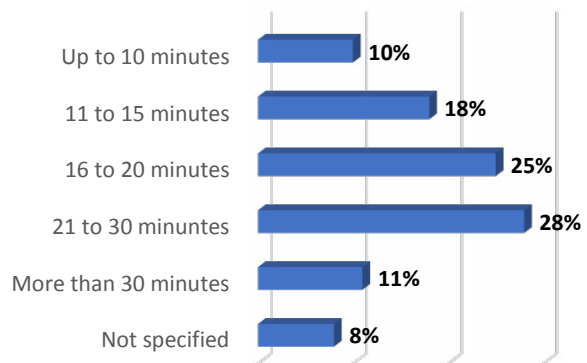
Accordingly, learner drivers are also satisfied with the distance, which is rated as very good by 49 percent and good by 27 percent. The location of the driving school as well as „word of mouth“ and reviews on the internet are also very important, as learner drivers ask around in advance and look at the reviews of other learner drivers. Of course, the price also plays a major role for 37 % of those surveyed, as does the availability of driving lessons (34 %). Other important criteria are the driving instructors who work on site and the times offered for theory and practical lessons (31 %).

How long is the journey time from your home to your driving school?



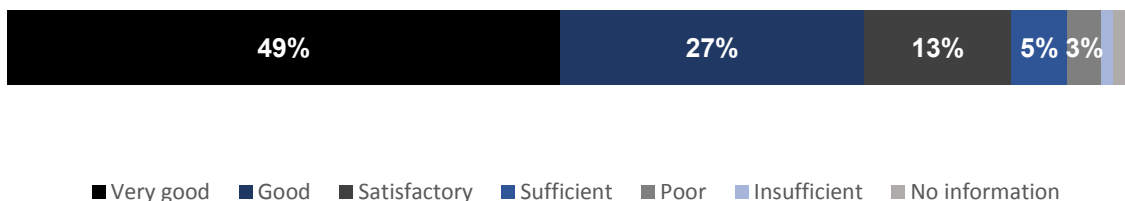
Source: MOVING learner driver survey, 2022

What is the maximum travel time to your driving school?



Source: MOVING learner driver survey, 2022

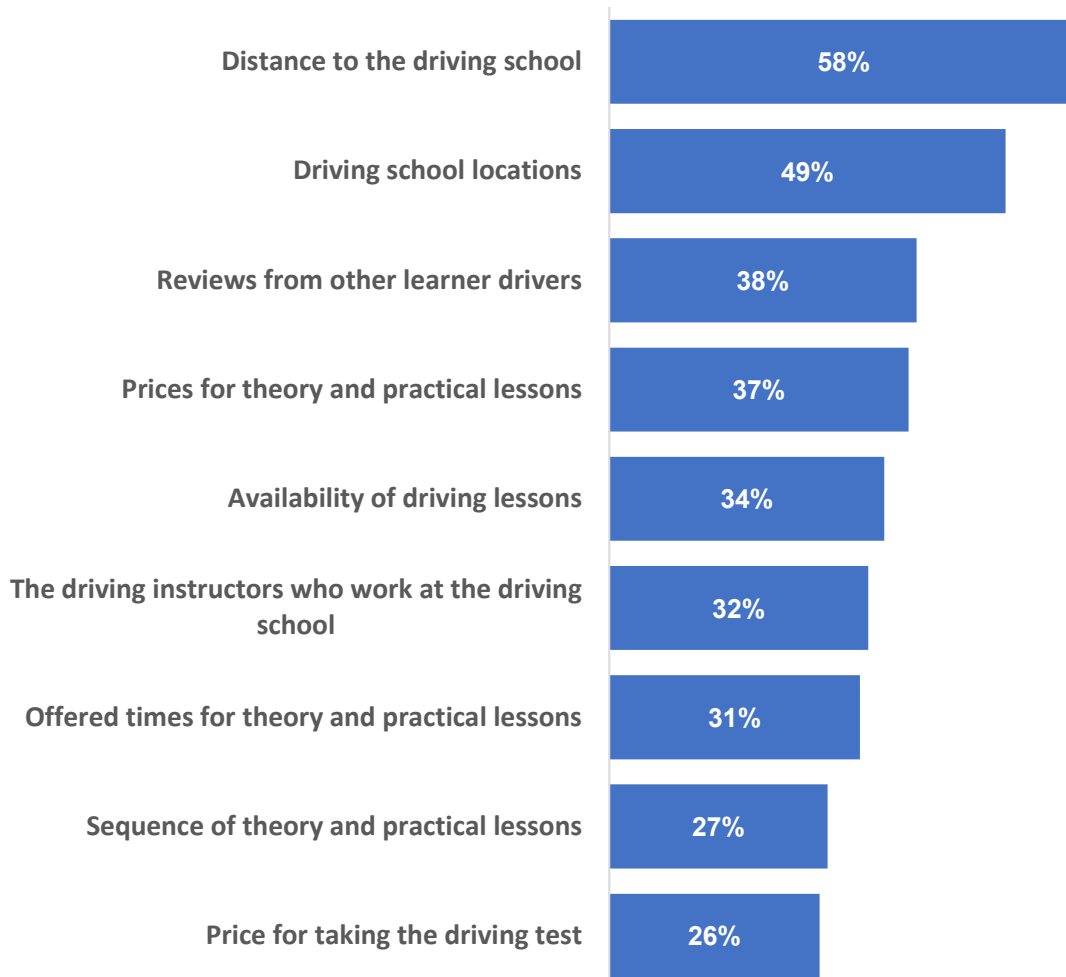
How would you rate the distance from your home to your driving school?



Source: MOVING learner driver survey, 2022

LEARNER DRIVER SURVEY

What criteria were decisive for the choice of your driving school?



Source: MOVING learner driver survey, 2022

Even in the age of the internet, it is still friends, acquaintances and schoolmates who are most frequently (57 %) used by new drivers to obtain information beforehand. In second place comes the family with 43 % and then the Internet with 39 %. Just under a third went to a driving school in person to get information. Recommendations from friends, acquaintances and family are considered very important or important by 64 % of respondents, while only 5 % do not value the

opinion of their immediate social environment. The initial consultation is very important for most learner drivers, which is why 75 percent would like to have this initial consultation before registering at their local driving school. Among 21 to 25-year-olds, two thirds are in favor of this, and among 16 to 18-year-olds the figure is as high as 82 percent. Personal contact is therefore still very important and cannot be replaced by anything else.

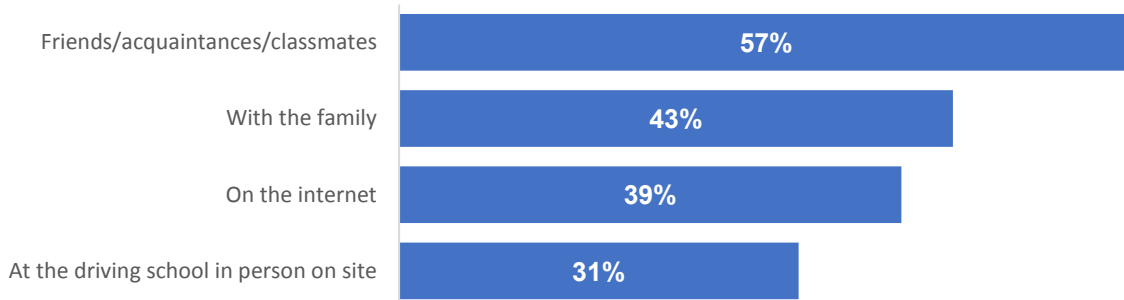
LEARNER DRIVER SURVEY

How should the first consultation with the driving school most likely take place?



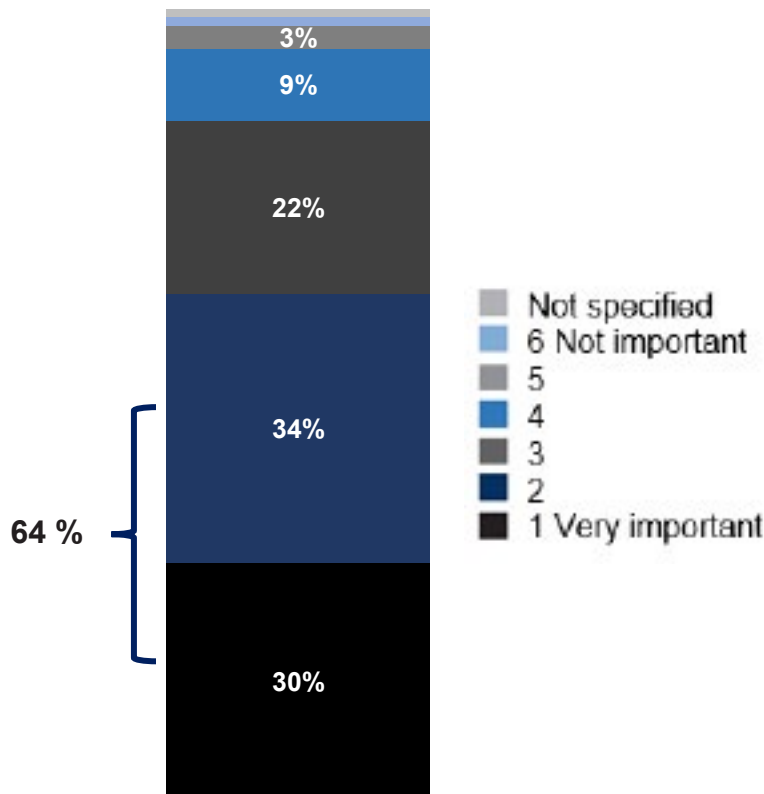
Source: MOVING learner driver survey, 2022

Which information channels did you use to choose your driving school?



Source: MOVING learner driver survey, 2022

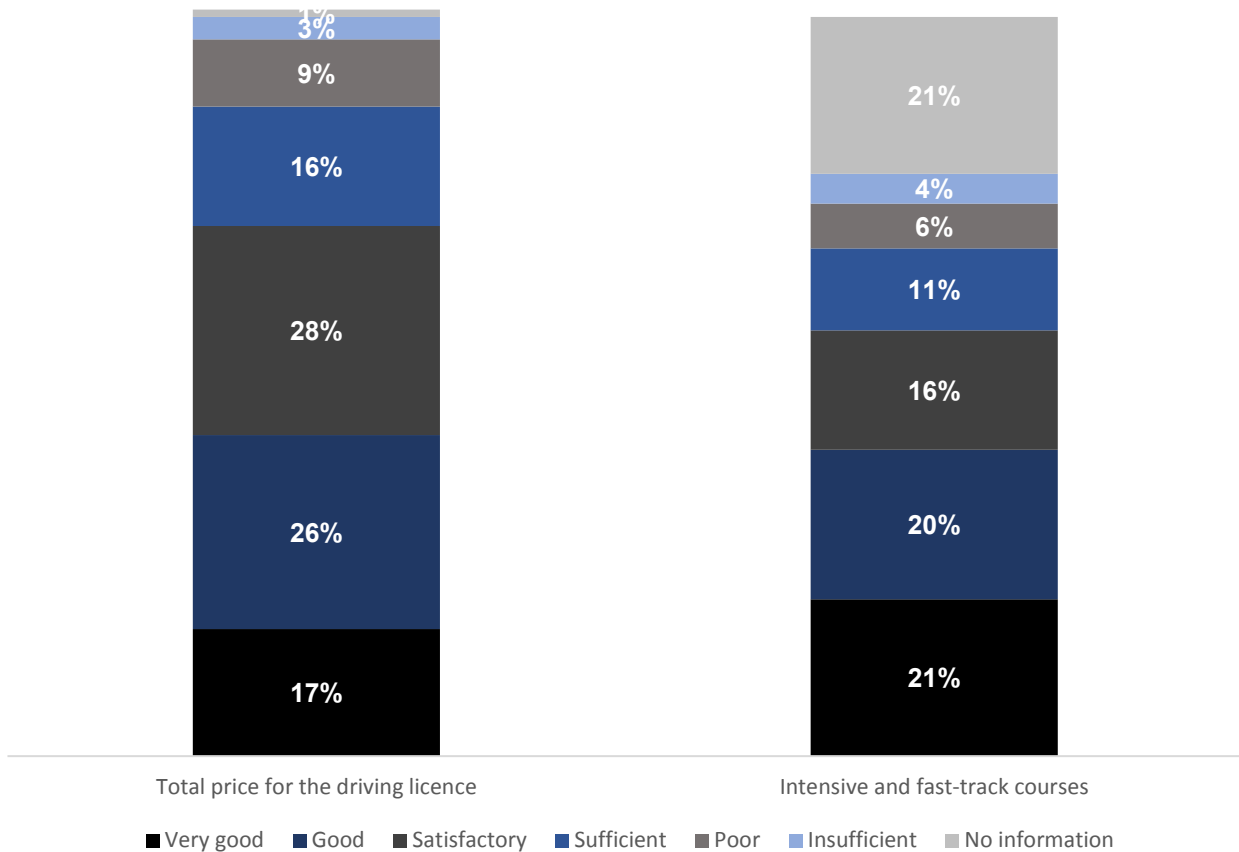
How important are recommendations from friends/acquaintances and family?



Source: MOVING learner driver survey, 2022

LEARNER DRIVER SURVEY

Detailed satisfaction with the driving school attended



Source: MOVING learner driver survey, 2022

In general, the learner drivers would like to see the offer of intensive, fast-track and holiday courses expanded; only 41 percent were satisfied with the current offer. Rising prices are also an issue for learner drivers.

Only 43 percent were satisfied with the overall price to date, which was five per cent less than in the survey in 2019. In view of further rising costs, this result is likely to deteriorate further in the future.

DRIVING INSTRUCTOR TRAINING

Driving instructor training

In January 2022, MOVING asked prospective driving instructors why they had chosen this profession. At just under 65 percent, the joy of working with young people was in first place, closely followed by the joy of teaching other people to drive (60.39 %), because driving has always been a great passion. The prospect of a secure job convinced just under half of the candidates, and the working hours were also attractive, with around 41 percent an argument for the job. The desire to run a driving school themselves one day motivated around a third to choose the profession. Digitalisation played almost no role, with only 4.83 percent of the participants giving this as a reason.

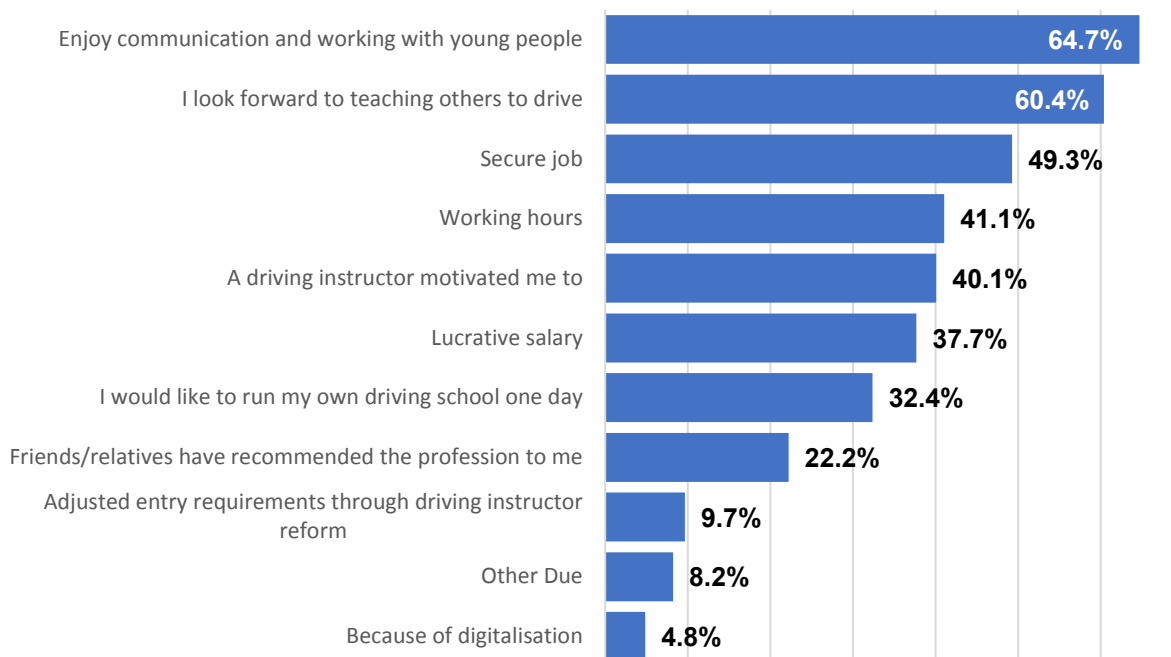
The training course was successfully completed by almost all participants.

HARDFACTS

- » **Enjoyment of working with young people is the most important criterion.**
- » **The average age of trainee drivers is just under 32 years.**
- » **Training course is successfully completed by almost all of them.**

Only eleven (5.1 %) ended their training prematurely and thus without a qualification. The average age of the participants was just under 32 years, with the largest age group being between 20 and 28 years old (43.1 %), followed by the 29 to 37 year olds (29.2 %). As there is an urgent need for younger driving instructors, this is a pleasing trend.

Why did you decide to become a driving instructor?



Source: MOVING survey, 2022, multiple answers were possible

DRIVING SIMULATORS

Driving simulators

More and more driving schools are using driving simulators to better prepare their students for road traffic and the test. Today, simulators are able to simulate everyday traffic situations realistically and practically. In this way, various procedures can be practised without any risk and even dangerous and unusual traffic situations can be simulated. However, training on a driving simulator does not yet count as classic driver training, as it is only used sporadically. However, a change in the conventional driving school concept has been introduced, as „affordable“ simulators are already being offered to driving schools.

The possibilities of the simulator are far from exhausted, and the development of the software shows that the scenarios are becoming more and more realistic and that even difficult weather conditions and imponderable dangerous situations can now be represented. In addition, the dangers of distraction through the use of smartphones while driving, for example, can be depicted. The use of the simulator also takes into account the planned expansion of training and driving tests around the topic of hazard perception. The aim is to better condition the learner drivers to recognise potential hazardous situations in time, to avoid them and, if necessary, to react adequately.

Driving simulators can help to combat the acute shortage of driving instructors, as neither a vehicle nor a driving instructor is required as the simulator works autonomously. A survey in 2021 of driving schools that use a simulator - conducted by the Institut für Automobilwirtschaft (IfA) - confirms the benefits of using one. For example, it increases the pass rate in the theoretical and

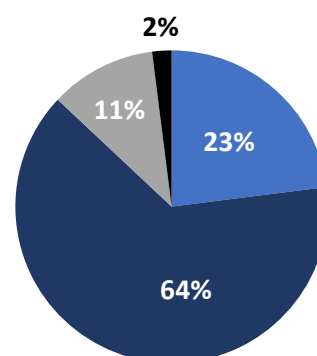
HARDFACTS

- » 90 percent of driving schools with simulators see business advantages.
- » Vehicle operation can be learned 100 percent on the simulator.
- » Switching competence requires 2.1 hours less.

practical driving tests, trains dangerous situations and thus increases road safety.

Driving schools that use a simulator usually have one device (76 %), but 19 % have two to five and 5 % even six to ten driving simulators. If a driving simulator is available, it is very popular with most driving students and an average of 83 per cent use it. In 57 per cent of the driving schools, it is used by more than 90 percent of the learner drivers, and only in eight per cent of the driving schools do fewer than ten learner drivers use it 50 percent of learner drivers in the simulator.

Number of simulator hours per pupil

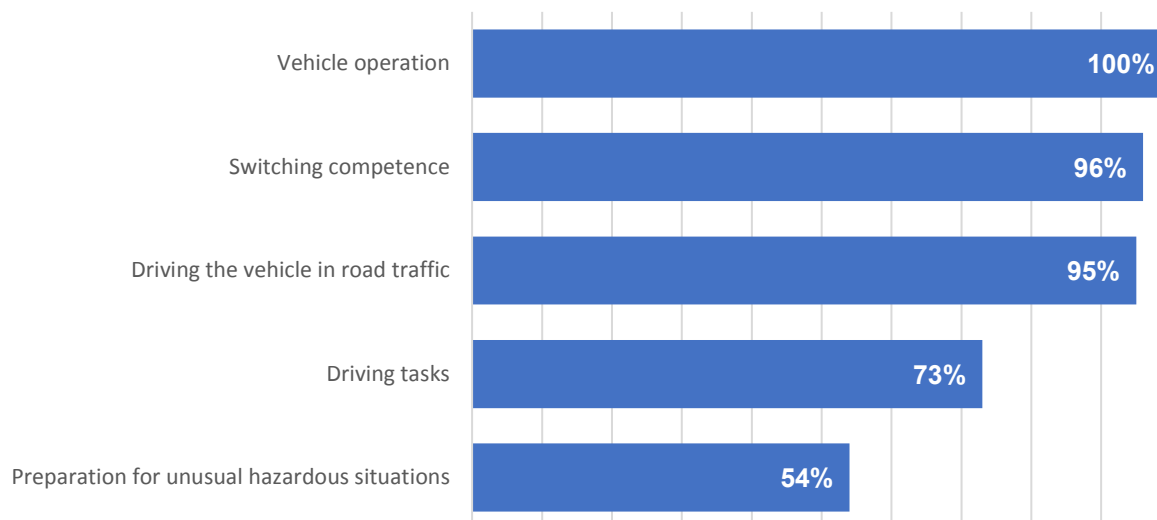


■ 1 to 5 ■ 6 to 10 ■ 11 to 15 ■ 16 to 20

Source: IfA driving school survey, 2021

DRIVING SIMULATORS

What content do you teach on the simulator?



Source: IfA driving school survey, 2021

Driving simulators are used to teach various subjects. In first place, with 100 percent, is vehicle operation, as it is of course possible to explain all functions to the learner driver on the simulator, for example how to operate the various pedals. With 96 percent, almost every driving school that has at least one simulator uses the simulator to teach shifting skills. This means that the learner drivers can practise starting off, changing gears and much more in a relaxed manner on the simulator. At 95 percent, the rate of driving the vehicle in road traffic is almost as high and thus a central training content. 73 percent of the driving schools use the simulator for driving tasks and 54 percent prepare the learner drivers for unusual dangerous situations.

67 percent of driving schools use the simulator as a mandatory module of a fixed training package, while a quarter offer the option of booking an individual additional package that is integrated as a supplement to traditional driving training.

This shows that simulator lesson packages have become established in driving school practice. This is certainly also due to the lower cost of a driving lesson, which in 2021 cost 28 euros on the simulator and was therefore 37 percent cheaper than a normal driving lesson. Learner drivers who take advantage of this ultimately benefit from lower overall costs for obtaining their driving license.

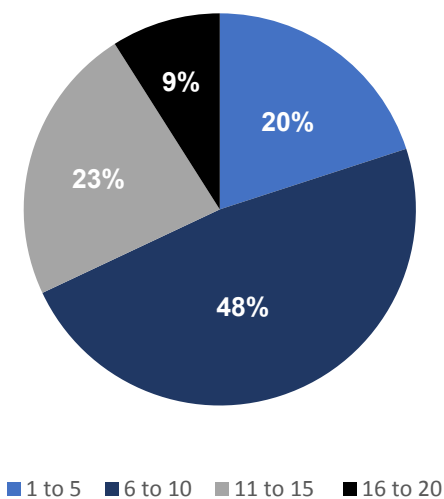
The driving schools that have invested in a driving simulator do not regret it in most cases. 90 percent of the driving schools state that the acquisition of a driving simulator was worthwhile from a business perspective. This is due, among other things, to the lower operating and personnel costs, less wear and tear and loss of value. On average, 45 percent of the driving lessons are completed on the simulator. This shows that the driving schools use their simulator extensively and have integrated it firmly into their training concept.

DRIVING SIMULATORS

The driving simulator is particularly advantageous for acquiring shifting competence. On average, a learner driver needs 9.3 driving hours to master shifting. Only 20 percent manage it in one to five hours, just under half need six to ten hours, 23 percent eleven to 15 hours and nine percent even more. 52 percent of the driving instructors believe that the simulator can contribute significantly to learning shifting skills. 48 per cent even believe that learner drivers can learn shifting skills solely on the driving simulator. To do so, they would schedule an average of 7.2 driving hours on the simulator, which is 2.1 hours less than in the driving school car. The driving instructors therefore assume that the learning efficiency is higher on the simulator.

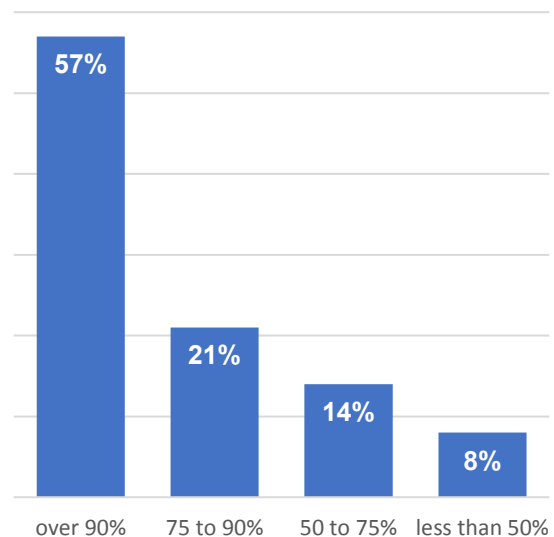
But there is another important aspect, and that is the environmental friendliness. According to a MOVING calculation, a driving lesson in the simulator saves 85 percent CO2 compared to a normal driving lesson in a Golf 8. In addition, training in the simulator reduces the volume of traffic and the production of the simulator requires fewer resources than that of a car. The simulator is inclusive, especially students with learning difficulties can be trained at a lower cost than in a real car. Thanks to the foreign languages (English, Russian, Turkish, Croatian, French and High Arabic), it helps to reduce the language barrier in training. Access to the simulator for driving schools is thus „barrier-free“ and thanks to favourable leasing or pay-per-use models, every driving school will soon be able to afford a simulator.

Number of practical driving hours until the acquisition of the switching competence



Source: IfA driving school survey, 2021

What percentage of your learner drivers use the driving simulator?



Source: IfA driving school survey, 2021

VEHICLE FLEET

Vehicle fleet

The fleet of driving schools has changed only slightly in the past two years. While the number of two-wheelers including the driving licence class AM has marginally decreased from 6.8 to 6.6, the number of passenger cars in the driving schools has increased from 5.8 to 6.45, according to MOVING calculations. The number of trucks has remained constant at 2.6 vehicles. Diesel vehicles are the most popular with 45 percent, followed by petrol vehicles (34 %). Electric vehicles are still underrepresented, but the trend is upwards. On average, every driving school has an electric vehicle.

Vehicles class A

67.26 percent of driving schools own exactly one moped for AM training, 24.66 percent have two and 6.28 percent have three or more mopeds, according to a February 2023 survey. For A1 training, 46.34 per cent offer one motorbike, 33.74 per cent have two, 11.38 per cent have three and 4.88 percent have four A1 motorbikes. For A2 training, 62.3 percent have one motorbike, 25.70 per cent have two, 6.35 percent have three and four per cent have four machines. In the case of the heaviest class A motorbikes (excluding the previous ones), 56.22 percent rely on one machine, 29.32 percent have two, 8.84 per cent have three and 4.02 percent have four motorbikes. Motorbikes are purchased and owned by most driving schools (85.1 %), 10.4 % are financed and only 4 % are leased.

Vehicles class B

The main business of driving schools is and remains driving license class B. 60.3 percent of the driving schools surveyed have between one and five vehicles in their fleet, 25.84 percent can offer six to ten vehicles.

HARDFACTS

- » On average, each driving school has 6.5 cars, 6.6 two-wheelers and 2.6 trucks available for training.
- » Most driving school cars are leased.
- » 85 percent of the motorbikes are owned by the driving school.

Number and age of driving school vehicles

	Motorbike	Car	Truck
Number	6.6	6.5	2.6
Age	3.6	2.3	5.7

Quelle: MOVING-Umfrage, 2023

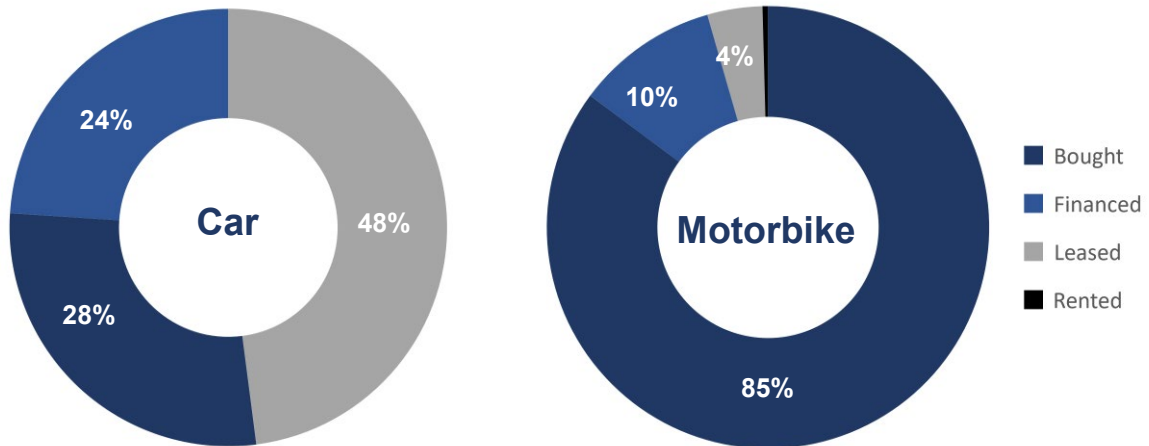
The larger the driving school, the larger the fleet, 7.49 percent have between eleven and 15 vehicles, 3.37 percent between 16 and 20, 1.5 percent between 21 and 25 and 1.48 percent even more than 25. 93 percent of all cars are no more than three years old. However, the ownership structure is very different from that of motorcycles due to the costs involved, as leasing is far ahead for passenger cars at 48 percent. 28 percent of cars are purchased and 24 percent are financed.

Vehicles class C

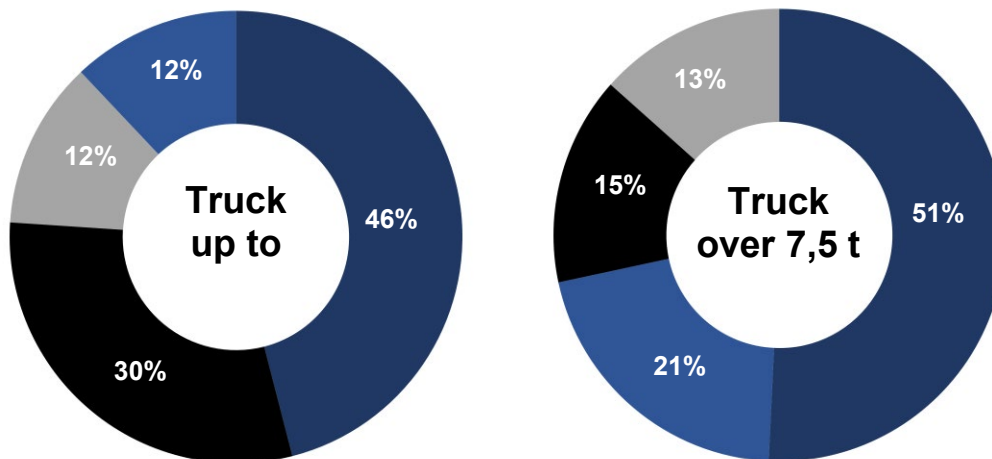
The trucks up to 7.5 tonnes are again 46 percent purchased, 30 percent rented and 12 percent leased or financed. For trucks over 7.5 tonnes, 50.75 percent are purchased, 20.9 percent financed, 14.93 percent rented and 13.43 percent leased. The driving schools that offer truck training have on average one truck of up to 7.5 tonnes and 1.5 trucks for training with trucks over 7.5 tonnes.

VEHICLE FLEET

Type of financing of the vehicles in the driving schools



Source: MOVING survey, 2023



Source: MOVING survey, 2023

Driver assistance systems

Driver assistance systems (DAS) are becoming increasingly important and are installed in every new car. It is important for learner drivers to get to know the different systems in order to be able to use them safely in road traffic. The most frequently installed VAS is the parking aid (96.91 %), which gives an optical or acoustic warning. The rain sensor (95.75 %) and the reversing camera (85.71 %) are also very practical

Other common systems include cruise control (82.24 %) and lane departure warning (77.2 %). The adaptive cruise control, which is already installed in three out of four driving school cars, is proving to be very useful, as are the driver fatigue detection and attention monitoring systems. The number of VAS will continue to increase in the future and must therefore be integrated more and more into training.

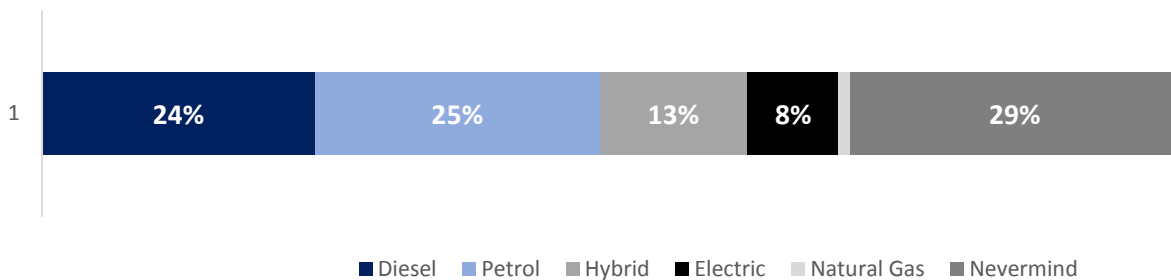
VEHICLE FLEET

Electromobility

Electromobility is one way of reducing emissions, which is why driving schools should gradually adapt their fleets. According to a recent MOVING survey of learner drivers, only one percent of driving schools have adopted electric cars so far. Diesel (45 %) and petrol (34 %) still dominate, with hybrids accounting for five percent. The German government has set itself the target of registering between seven and ten million electric vehicles by 2030. Driving schools need appropriate support and assurances from the legislator.

Only 31 % of all learner drivers surveyed would be prepared to pay a surcharge for training in an electric car. However, in a MOVING survey in January 2022, only eight percent of learner drivers answered the question about the ideal driving school vehicle with an electric car and 13 percent with a hybrid. The reason for this could be that young people usually have limited financial resources and therefore initially purchase an inexpensive car after obtaining their driving license and, according to a survey by YouGov, can hardly spend more than 2,500 euros.

What would be the optimal driving school vehicle for you?



Source: MOVING learner driver survey, 2022

GUEST CONTRIBUTION



Dipl.-Ing. Mathias Rüdell

Managing Director
TÜV | DEKRA arge tp 21

Novice drivers cause above-average Many accidents and more frequent serious injuries

Novice drivers still have a particularly high accident risk: they cause an above-average number of accidents in the first few years after obtaining their driving licence and are more likely to suffer serious injuries than experienced drivers. The aim of professional driver training and the subsequent driving test is to teach and test the necessary skills for safe participation in road traffic in order to reduce this risk.

Car accident figures among young people down

If we look at the accident figures of the last eleven years, there have been considerable successes. The number of passenger car accidents with personal injury caused primarily by drivers in the age group 18 to under 21 has fallen by almost 43 percentage points from 2011 to 2021 compared to the initial level. The assumption that this significant decrease is solely due to safer vehicles or an improved traffic infrastructure falls short: In the older age groups, these figures decreased by only 20 percentage points in the same period, whereby this change is almost exclusively due to decreases in the pandemic years. This means that the decline among 18- to under 21-year-olds is more than twice as strong as among the other road users, although they potentially benefit from new technical developments in the field of active and passive vehicle safety to the same extent or even to a lesser extent due to differences in equipment.

Even the introduction of the demonstrably road safety-promoting regulation „Accompanied Driving from 17“ (BF17) can only explain this effect to a limited extent, since the actual implementation of the regulation already took place before the period under consideration and the annual number of participants in the BF17 is constant or tends to decline over time according to the Federal Motor Transport Authority (KBA). The traffic safety-promoting effect of the BF17 regulation should therefore already have been taken into account in the initial level.

GUEST CONTRIBUTION

The extent to which a change in the mobility behaviour of young drivers contributes to this development can only be answered more precisely with additional information from representative surveys on population development and mobility data. If the accident figures are put into perspective with the figures on population development from the Federal Statistical Office, 9.6 accidents with personal injury were caused per 1,000 people aged 18 to under 21 in 2011. In 2021, this risk indicator was 5.8 per 1,000 persons. The risk can be determined even more precisely on the basis of driving performance. Based on the data of the study „Mobility in Germany“, this group of young drivers had around 1.6 car accidents with personal injury per 1 million kilometres driven in 2011; in 2021, the figure was 0.9 accidents per 1 million kilometres driven.

Road safety of novice drivers has improved significantly in recent years

In summary, it can be said that the traffic safety of young car drivers has improved unmistakably in recent years. This development is clearly different from that of other road users. In order to determine more precisely what influences changed driving behaviour of young drivers or demographic developments have, further data are necessary. However, it can be reasonably assumed that the optimisation of measures specific to novice drivers, such as professional driving training and the science-based independent driving test in Germany, has contributed significantly to this success.

Dipl.-Ing. Mathias Rüdell
Managing Director TÜV | DEKRA arge tp 21

15. AMENDMENT OF THE DRIVING LICENCE ORDINANCE

Driving assistance systems

The 15th amendment to the Driving Permit Ordinance (FeV) came into force on 1 June 2022. According to this, test vehicles of class B as well as C and D classes must have driver assistance systems (DAS) that can actively and continuously take over the longitudinal and lateral control of the vehicle in a specific application. These include, for example, adaptive cruise control and lane departure warning systems. MOVING has long advocated the use of driver assistance systems in driving school training. Therefore, learner drivers should be introduced to the operation and use of VAS as early as possible by the driving instructor. In addition, they must be able to recognise the limits of the systems at any time so that they can react appropriately in the event of a malfunction. The knowledge of the driver assistance systems must therefore also be demonstrated in the driving test. For this reason, the driving schools' test vehicles must be equipped with the essential VAS. The driving schools have long since reacted to this development, not least because of B 197, and have equipped their vehicle fleets accordingly. For this reason, it has been common practice for years to train the VAS in practical driving lessons, because they are now part of the standard equipment in most vehicles and have to be used accordingly. The originally planned deadline, according to which test vehicles of category B would have had to be equipped with the aforementioned VAS as early as 2024, was not included in the ordinance. This means that older vehicles, even if they are not equipped with these driver assistance systems, may continue to be used for training and testing until a replacement vehicle is purchased. The driving schools that still need to catch up in this respect should bring their vehicle fleet up to date as soon as possible, especially in driving licence class B.

Clarifications B 197

As early as 1 April 2021, it will be possible to take the driving licence test for driving licence class B on a vehicle with automatic transmission without the driving licence then being restricted to driving such vehicles. The Ordinance on the Training and Examination of Vehicles with Automatic Transmission and on the Amendment of Further Provisions of the Driving Licence Ordinance waives the so-called automatic transmission restriction or lifts this restriction, even if the practical driving licence examination has been passed on a vehicle without manual transmission. The prerequisite is a training course in a driving school of at least ten hours (45 minutes each) as well as a 15-minute test drive, in which the respective applicant must prove that he/she is capable of driving a motor vehicle in category B in a safe, responsible and environmentally conscious manner.

Attempts to deceive

In recent years, the number of cheating attempts in the theoretical driving test has increased significantly, and in some cases very sophisticated methods have been used. TÜV Rheinland speaks of several thousand cases nationwide. The 15th amendment to the FeV stipulates that cheaters will in future have to wait up to nine months for a second test and thus bear a noticeable and painful consequence. Previously, it was only six weeks. There is great hope that the tightening of sanctions will reduce the number of attempts to deceive.

15. AMENDMENT OF THE DRIVING LICENCE ORDINANCE

Online lessons

The 15th amendment to the Driving Licence Ordinance also stipulates that, once it comes into force, online lessons will only be permitted if face-to-face lessons are restricted, for example, by Corona regulations such as access restrictions, distance regulations, compulsory tests and masks. Corona has also accelerated the digitalisation of driving schools and has meant that many driving school owners have had to invest in hardware and software. In future, online lessons will only be possible under certain conditions, but in principle, lessons will be held in person again in order to guarantee the quality of the training.

Driving instructor training

MOVING also welcomes the significant improvements in the training plans for driving instructor training. The contents to be taught have been specified and the levels have been graded. MOVING sees the inclusion of driving practice as an important step, as there have been very different approaches to this in the past at the driving instructor training centres. However, MOVING expressly points out that the reform of driving instructor training can only be successful if the driving instructor examination is also reformed. However, MOVING is critical of the reduction from 40 to 32 teaching units. The acquisition of urgently needed practical experience will be reduced too much for the driving instructor candidates and the time span until the completion of the teaching internship will be extended.

DIRECTIVE 2006/126/EC

Directive 2006/126/EC

A proposal (text for the directive + Annexes I and II) for the new driving licence directive was drawn up and presented to the Cabinet of Commissioners of the European Union in Brussels. The aim of this directive is in particular to end the coexistence of different national regulations and the more than 110 different driving licences in Europe.

The proposal must now be adopted by the European Parliament and the Council as part of a co-decision procedure, which may even take two years. It is important to remain active in this European legislative process. It is necessary to analyse the individual articles and provisions of the proposed directive. However, there are some aspects that need to be emphasised:

- Introduction of the new principle of accompanied driving for drivers who are between 17 and 18 years old (Article 14).
- Introduction of a probationary period of at least two years, during which novice drivers are subject to strict rules regarding driving under the influence of alcohol and possible additional national conditions (Article 15).
- The need for new driver candidates to take a hazard perception test (Annex II, p. 30 onwards).
- The requirement to assess knowledge of risk factors related to micro-mobility, the safety of alternative fuel vehicles, the capabilities related to advanced driver assistance systems and other aspects of the automation of a vehicle (Annex II from p. 30).
- The relaxation of the requirements for drivers who have passed their driving test with an automatic transmission when they apply for the lifting of the corresponding restriction in their driving licence (Annex II from p. 30).

GUEST CONTRIBUTION



Antonio Avenoso

Executive Director
European Road
Safety Council

How an updated EU driving licence directive can improve road safety

Every week in the EU, an average of 100 young people die on the roads and hundreds more are seriously injured. Changes to driving licence rules can help prevent many of these deaths and injuries. The European Commission is currently preparing a comprehensive revision of the EU Driving Licence Directive (2006/126). The ETSC would like to see the EU introduce a system of staggered licences to address the high risks faced by novice drivers and to give them the opportunity to gain initial driving experience under lower risk conditions in the period between obtaining their licence and becoming a full driver, and to encourage a higher level of accompanied driving while novice drivers learn and gain experience.

Young people, especially young men, are over-represented when it comes to drink-driving related fatalities. The ETSC calls for the introduction of probationary periods for novice drivers, restrictions on driving with passengers of the same age and at night, zero tolerance for drink and drugs behind the wheel, and the introduction or application of stricter points systems. The fundamental aim of pre-driving licence training and the licensing process should be to create drivers who are safe, not just technically competent, by the time they are allowed to drive unsupervised. This includes providing novice drivers with appropriate cognitive levels and safety-oriented motives. The ETSC advocates the development of minimum standards that include a matrix of driver education (GDE) objectives and provide for a gradual alignment of the form, content and outcomes of driving courses across the EU.

Update driver training and tests

Driver training and testing must also be updated to include the use of new technologies and prepare for partially and fully automated driving. Studies show that hazard perception training has an overall positive impact on safety and leads to improved hazard perception, lower collision rates and lower driving speeds. Building on Annex II of the existing directive on „recognising road hazards“ during the test, hazard perception training for drivers should be introduced in all EU Member States.

GUEST CONTRIBUTION

Hazard perception training can also be carried out on driving simulators. Driver training should also include driving at night. The minimum standards for the „form“ should also be defined and it should be determined when driving simulators and digital learning tools or „in the classroom“ or „in the car“ are most appropriate. Driving simulators can be used to teach specific content such as the effects of drinking and driving or responding to hazards. A full list of the possible uses of driving simulators, including the role of the driving instructor accompanying the learner driver, should be included in the minimum training standards.

Using digital learning tools

Digital learning tools can also be used in driver training. Here too, minimum standards should be developed to ensure the quality and effectiveness of online driver training, including the verification of learning outcomes.

The Directive sets minimum requirements for examinations. Examinations play an important role in determining the levels of competence required for admission and in assessing a candidate's performance in a number of areas. Examinations also set the competences that determine what candidates will learn during their training. The examinations should also address the skills and attitudes associated with safe participation in road transport, such as hazard perception. Drivers must also have access to a range of driving situations. The tests must be long enough to allow the examiners to properly assess the candidates' abilities.

The current Driving Licence Directive contains new minimum standards for driving examiners (Annex IV), including basic training and qualification and periodic training. The ETSC advocates further improvements, including a requirement for a more rigorous minimum level of training for examiners, as well as high quality in-service training, including hazard perception, with a focus on content and quality and not only on the number of hours.

GUEST CONTRIBUTION

How an updated EU driving licence directive can improve road safety

The quality of driving tests should also be ensured by independent testing organisations and their objective assessment. The younger a person starts unrestricted solo driving, the more likely they are to have a fatal collision, especially if they are under 18. Therefore, as a first step, it is extremely important to set an appropriate age for first unrestricted solo driving. Raising the minimum age for driving saves lives by preventing young and inexperienced drivers from driving alone until they are older. The conditions for driving two-wheeled motor vehicles should be similarly strict to prevent a drift to less safe modes of transport. The ETSC is strongly opposed to lowering the minimum age for all types of road users. The minimum age for obtaining the different categories of driving licences is set in the EU Driving Licence Directive, but there is also some flexibility.

In 2018 alone, 2,630 people were killed in collisions with light commercial vehicles (LGVs) in the EU, which was 11% of all road fatalities. The use of trucks in Europe is likely to increase further, for example due to the growing demand for home deliveries. Truck drivers travelling for work are often under time pressure, which means that they often drive too fast. The current requirements for bus and truck drivers, including the need for professional driver training (certificate of competence), should also be extended to van and taxi drivers.

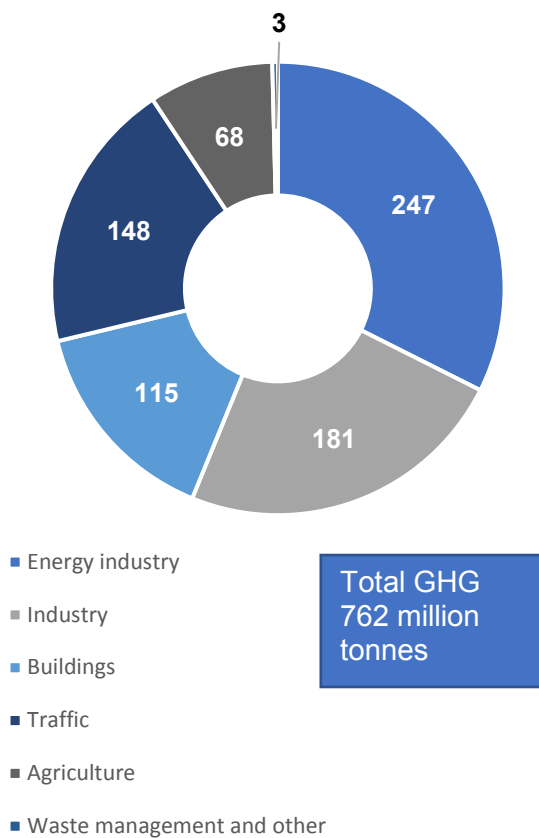
Antonio Avenoso
Executive Director
European Road Safety Council

SUSTAINABILITY AND THE ENVIRONMENT

Sustainability and Environment

The topics of sustainability and the environment have long since reached driving schools. A Eurobarometer survey from 2022 shows that 93 percent of respondents consider climate change to be a serious problem. That is why the EU wants to ensure that Europe becomes the first climate-neutral continent. To achieve this, there should be no net greenhouse gas emissions by 2050, economic growth should be decoupled from resource use, and no one - neither people nor regions - should be left behind. This new growth strategy is anchored in the Green Deal.

Greenhouse gas emissions in Germany in 2021 in million tonnes



Source: Federal Environment Agency, Dessau, 2022

HARDFACTS

- » **93 percent of EU citizens consider climate change to be a serious problem.**
- » **The Federal Government wants Germany to become greenhouse gas neutral by 2045.**
- » **Electromobility, eco-drive, simulators and further training are required.**

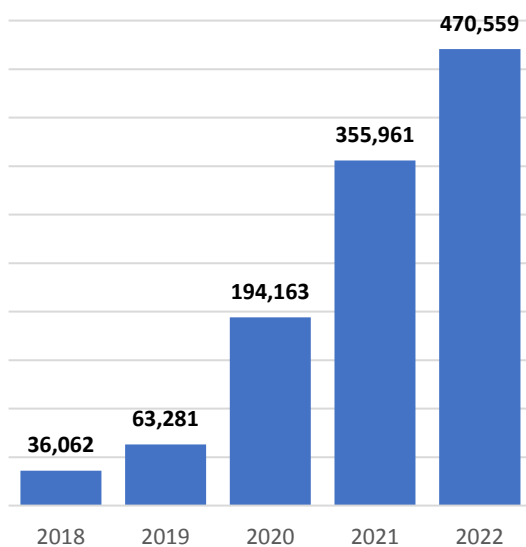
It is clear that the transport sector also plays a major role here, as about a quarter of greenhouse gas emissions in the EU are generated here. In Germany, the share of road traffic is about 20 percent. The „green deal“ envisages that these emissions should be reduced by 90 percent by 2050.

Environmental awareness is also very high in Germany and the federal government wants Germany to become greenhouse gas neutral by 2045. This can only be achieved through climate-friendly mobility and this is where driving schools come into play. They are the first point of contact for young people who want to become mobile. That is why it is the task of the driving school to sensitise young novice drivers. This also applies to the training of drivers in the truck and bus sector. In the EU in 2020, about 61 percent of CO₂ emissions in road traffic were produced by cars and motorbikes, 28 percent by trucks and buses and 11 percent by light commercial vehicles. In order to achieve the CO₂ targets, MOVING proposes different areas.

SUSTAINABILITY AND THE ENVIRONMENT

Overall, the electric car is gaining ground in Germany and has increased its sales figures from 36,062 vehicles to 470,559 between 2018 and 2022. This means a share of 17.7 % of all new registrations and an increase compared to the previous year.

New registrations of electric cars, 2018 to 2022



Source: Federal Motor Transport Authority, Flensburg, 2023

Eco-Drive

However, driving schools have other ways to protect the environment. They should pay attention to eco-driving (fuel-saving driving) and train their learner drivers accordingly. MOVING is in favour of driving schools offering Eco-Drive courses for both novice drivers and older licence holders. Here, technical innovation and individual driving behaviour are to be combined into a fuelsaving driving style. According to the Austrian organisation klimaaktiv, fuel consumption can be reduced by up to 25 percent through the driving and behavioural patterns taught in Eco-Drive courses.

Driving simulators

The use of driving simulators in driving licence and professional driver education and training is another important point that MOVING would like to initiate. The use of simulators has a demonstrably positive effect on driving school marketing, increases the contribution margin per pupil in training and ensures an increase in capacity without having to increase staff. Above all, the simulators' eco-balance is excellent, as one simulator hour produces 14 times less CO₂ than a comparable driving hour in a car. In Germany alone, more than 688 tonnes of CO₂ were saved in 2018. The savings for replaced truck or bus driving hours would also be many times higher. The driving simulator can therefore make an important contribution to learning and maintaining a fuel-efficient driving style and, to a limited extent, replace real driving hours. MOVING is of the opinion that driving lessons can indeed be substituted by the driving simulator and sees this confirmed by a commissioned study. MOVING therefore supports the introduction of simulators in driving training for the various driving licence categories.

Lifelong learning

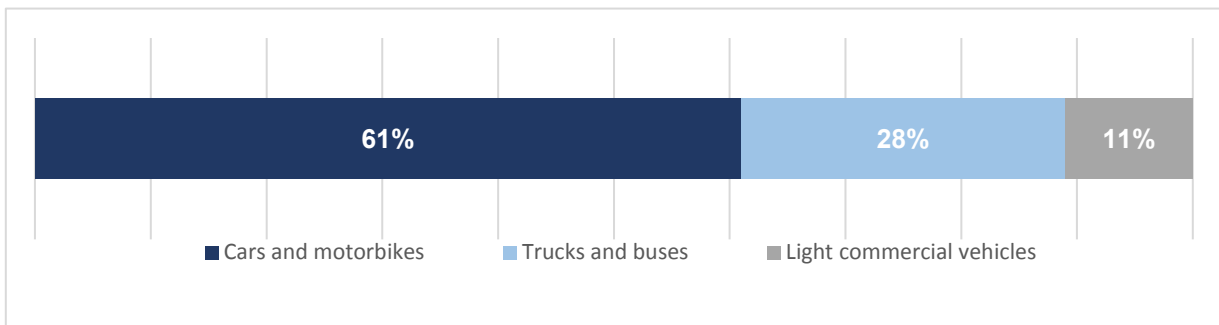
Hazard perception training can also be carried out on driving simulators. Driver training should also include driving at night. The minimum standards for the „form“ should also be defined and it should be determined when driving simulators and digital learning tools or „in the classroom“ or „in the car“ are most appropriate. Driving simulators can be used to teach specific content such as the effects of drinking and driving or responding to hazards. A full list of the possible uses of driving simulators, including the role of the driving instructor accompanying the learner driver, should be included in the minimum training standards.

SUSTAINABILITY AND THE ENVIRONMENT

The result is that new car owners don't even use many of the useful systems because they don't know how they work. The manual remains unread in the glove compartment, because driving works without the driver assistance systems. The fear of doing something wrong ultimately means that the useful helpers lie idle and are unable to fulfil their actual purpose. Countermeasures must be taken here to achieve greater road safety.

MOVING wants to help achieve the climate goals in Germany and the European Union, which is why its members fully support the goals of the Green Deal. However, the path to climate neutrality can only be taken together, because it is a shared responsibility. MOVING therefore sees a holistic approach to education and training as indispensable. It is based on electric mobility, environmentally friendly driving, the use of simulators and lifelong learning.

Carbon dioxide emissions from road transport in the European Union 2020



Source: Eurostat (EEA), 2021

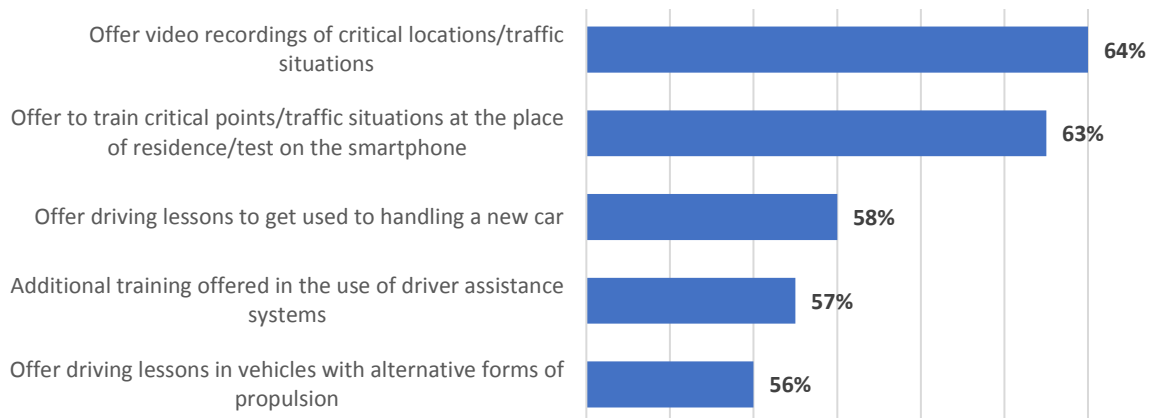
NEW BUSINESS FIELDS

New business fields

The development in the areas of digitalisation and vehicle development is rapid. More and more new driver assistance systems are being integrated into vehicles, but often the owners do not even use them because they lack the knowledge to use them properly. This is no wonder, because the typical buyer of a new car is on average 52 years old and is used to driving his previous car. New features should be self-explanatory at best, but they rarely are. And the manual for the new vehicle usually remains unread in the glove compartment. In this context, driver assistance systems offer great advantages in terms of road safety, but only if they are

operated correctly. This means that there is a great need for training here, which offers a real opportunity for driving schools. Specific training courses on driver assistance systems could be offered here, a training offer that would also be welcomed by 57 percent of learner drivers in a MOVING survey. 58 percent would even like to see driving lessons offered to help them get to grips with a new vehicle. It will probably be decades before autonomous driving is a reality, but semi-automated driving will not be long in coming due to driver assistance systems. Training in driving schools will have to change accordingly.

Future issues from the perspective of learner drivers



Source: MOVING learner driver survey, 2022

Electric vehicles

Driving schools can no longer ignore electric vehicles. That is why every fleet should have at least one electric car so that the learner drivers can learn how such a car drives. The offer of driving lessons in vehicles with alternative forms of propulsion is desired by 56 percent of the learner drivers. The offer of being picked up at a flexible location for the driving lesson to begin there is in first place with 71 percent of the learner drivers. This should then be bookable online.

There is also great interest in video recordings of critical traffic situations (64 %) in order to be optimally prepared for the practical and theoretical test. These critical traffic situations on site should then be trainable on the smartphone (63 %).

In view of the high energy prices, driving schools can offer driving and economy training in which drivers learn to drive as ecologically as possible in order to reduce their fuel consumption. Other business areas include driver safety training, retraining and further education.

FUTURE PROSPECTS

Future prospects

After the difficult Corona years, the driving school sector is again predominantly optimistic about the future. This is also reflected in the turnover expectations for the first half of 2023. 31 percent of driving schools expect an increase of at least five per cent, while a further 49 per cent expect relatively constant turnover. This is very pleasing in view of the satisfaction with the second half of 2022, when 30 percent rated the result as very satisfied, 36 percent as satisfied and 22 per cent as okay. Nineteen percent of the driving schools fear a decline in turnover, nine percent even expect a drop of more than ten percent.

The relatively good situation then also leads to the fact that 40 percent of all driving schools want to maintain the status quo and continue as before. 16 percent even plan to expand their business or buy another driving school. But in many driving schools, succession is also an important topic. Twelve per cent expect to hand over the business within the family in the next ten years, eight per cent want to sell to a third party and six per cent want to hand over the business to an employee. Only eight percent of the respondents said that they would close their business within the next ten years.

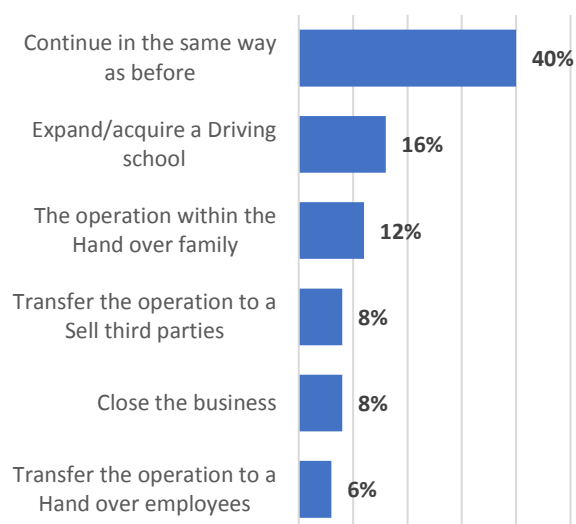
The driving schools that want to expand see this as improving their competitiveness in the future (65 %) or maintaining their competitiveness (57 %). Conversely, 49% fear that small driving schools will no longer be competitive in the future. The expansion is associated with great optimism, as 49 percent see very positive future prospects for the driving school sector.

HARDFACTS

- » Driving schools are predominantly optimistic about the future.
- » Driver instructor shortage is seen as the biggest challenge.
- » 65 percent of driving schools have invested in hardware and software

The opportunities of digitalisation, on the other hand, are only a decision factor for 27 percent. Nevertheless, most driving school owners are aware that changes are imminent and must be implemented. Nine percent wanted to tackle these in 2022, the year of the survey. Twenty per cent expect changes in the next two years, another 15 percent in the next three to five years. But about one third of the driving school owners have not yet planned any changes.

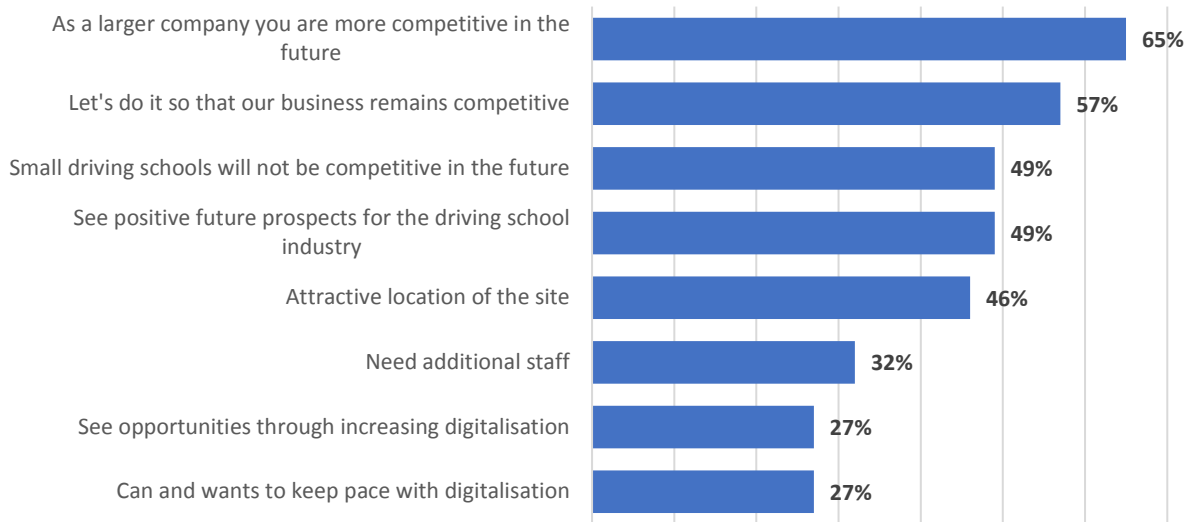
What are the plans?



Source: MOVING Market Insights, 2022

FUTURE PROSPECTS

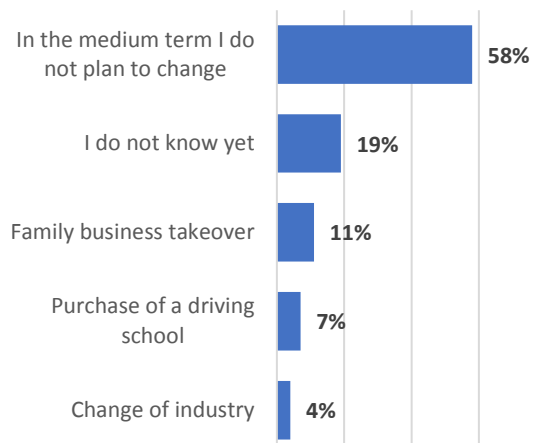
Why are you planning to expand?



Source: MOVING Market Insights, 2022

However, not only driving school owners were asked, but also employees who gave information about their perspectives. 58 percent seem to be happy with their work at the moment, because they are not planning any change, and another 19 percent have not yet thought about it. Eleven percent are employed in the family business and would like to take it over in the long term, and seven percent would like to buy their own driving school. Only four percent of the respondents are considering a change of industry.

What are your plans as an employee?



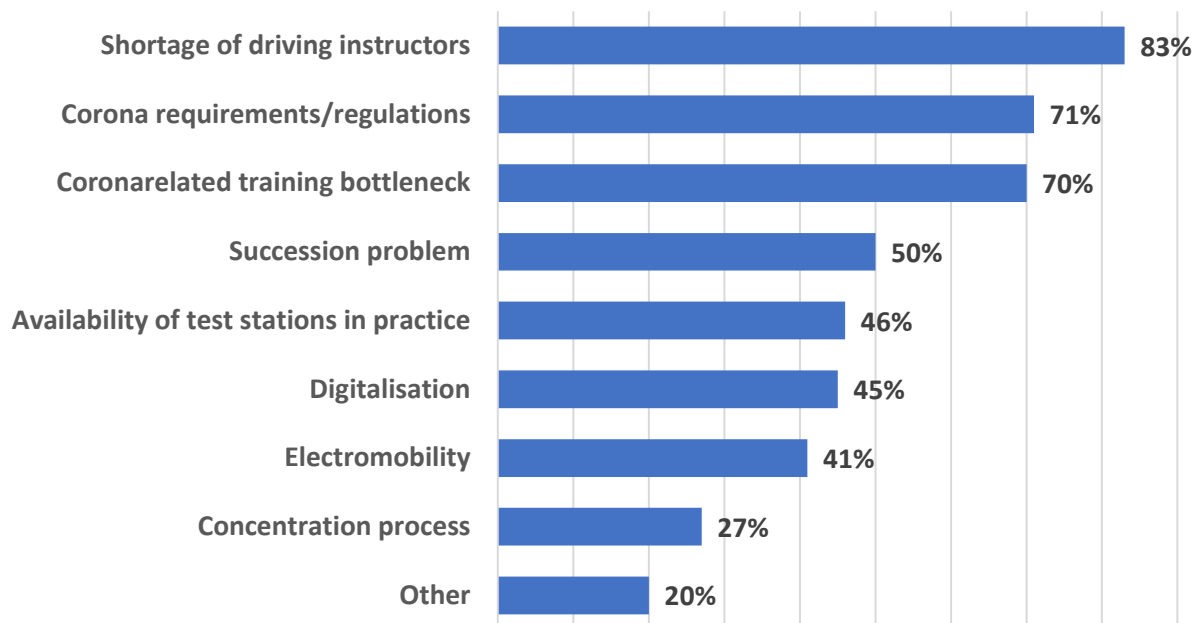
Source: MOVING Market Insights, 2022

The biggest challenges

The MOVING survey in 2022 was of course still heavily influenced by the coronavirus situation and the pandemic is therefore represented twice in the top 3 when it comes to the question of the biggest challenges. The biggest challenge for driving schools, however, is the shortage of driving instructors (83 percent). In large cities, 91 percent of driving schools cite the shortage of driving instructors as the biggest problem. The corona requirements follow with 71 percent and the corona-related training backlog with 70 percent. These figures are a snapshot and are likely to fall again in the next few years in view of normalisation. Due to the increasing age of driving school owners, the succession problem is a very important issue for 50 percent of those surveyed, especially for small driving schools, which are often still family businesses. Here, 60 percent of the owners surveyed named succession as the biggest problem. The availability of practice test places (46 %), digitalisation (45 %) and electromobility (41 %) were also cited as challenges.

FUTURE PROSPECTS

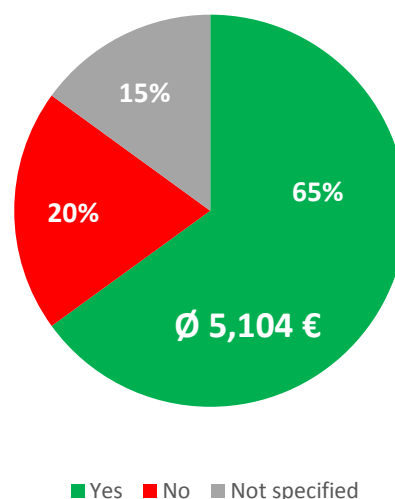
What are the biggest challenges for the future?



Source: MOVING Driving School Market, 2022_1

Driving schools are responding to digitalisation, which is why 65 percent have invested in hardware and software in 2022. This will also be necessary in the coming years in order to remain competitive. On average, 5,104 euros were invested in improving the IT infrastructure. While small driving schools with an annual turnover of up to 100,000 euros spent an average of 3,210 euros, large driving schools with an annual turnover of over 250,000 euros spent as much as 8,327 euros. 20 percent of the driving schools were not active in this area in 2022, and another 15 percent did not provide any information. Forty-five per cent believe that investment in digitalisation is necessary. Here, too, it is the large (54 %) and very large (67 %) that share this insight.

Investment in hardware and software



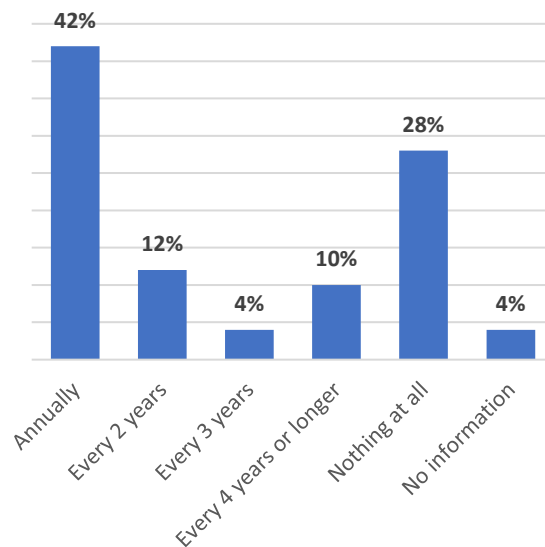
Source: MOVING Driving School Market, 2022_1

FUTURE PROSPECTS

Further education

To ensure that driving instructors are at least on a par with their students in terms of media competence, there are informative further training courses. 42 percent of the driving schools make use of this opportunity every year, twelve percent send their instructors for further training every two years, four percent every three years and ten percent every four years or less. In fact, 28 percent of driving schools do not use this option at all, and 49 percent of small driving schools do.

How often do driving instructors take part in further education courses on media competence?



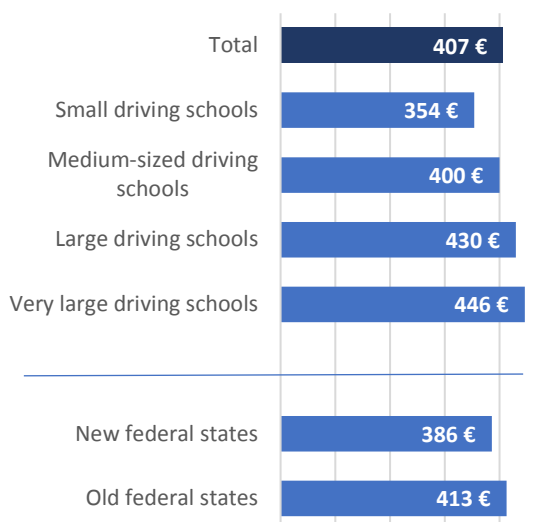
Source: MOVING Driving School Market, 2022_1

Overall, 19 percent assume that the basic amount will decrease by at least 25 percent, while a further six per cent of driving schools even fear a decrease of more than 50 percent.

Basic amounts

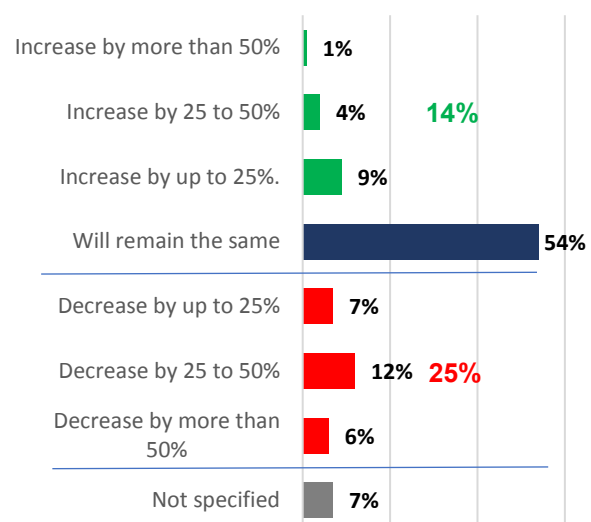
In many cases, face-to-face theory lessons are vital for the economic situation of driving schools. In many cases, because one in four driving schools fears that the basic fees will fall in the event of purely online theory lessons.

Average amount of the basic amounts for registration for driving licence class B



Source: MOVING Driving School Market, 2023_1

Change in the basic amount with 100 % online theory lessons



Source: MOVING Driving School Market, 2023_1

FUTURE PROSPECTS

Headquarters and branches

The effects of purely online theory instruction are economically noticeable for the driving schools. Almost one third of the driving schools (29 %) assume that they would close their driving school (12 %) or at least one location (17 %) in the event of one hundred percent online teaching. Especially in rural regions, this could lead to a significant decrease in the number of training opportunities in the area.

Small driving schools particularly affected

Small driving schools with an annual turnover of up to 100,000 euros are particularly affected by the closure of driving schools: 24 per cent state that they will close their driving school. In the new federal states, one in five driving schools (20 percent) would take this step and give up the driving school. However, even the large driving schools with an annual turnover of 250,000 euros or more or more tend to be prepared for the event that theory lessons were to take place 100 per cent online in the future online or may also be offered via platform providers, at least one location close at least one location. 24 percent stated in the survey that they would take this economic step, and this tendency is much more pronounced in the old federal states (19 %) than in the new federal states. than in the new federal states.

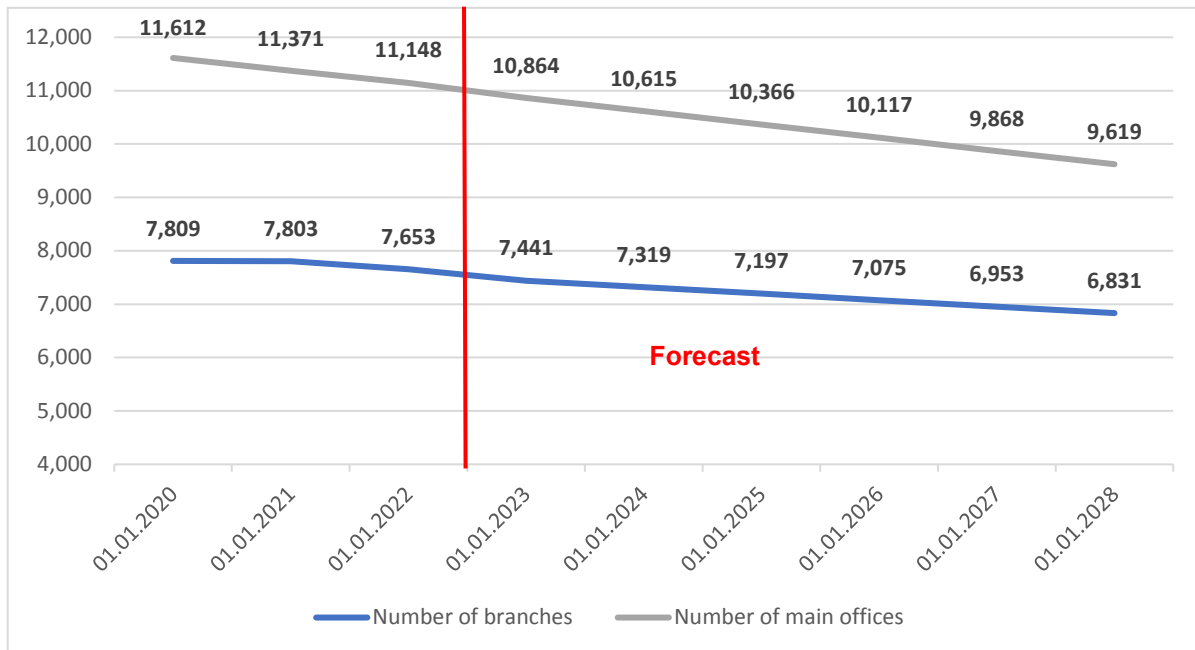
Forecast with and without online-only theory classes

The trend is clear, as the number of main and branch offices will continue to decline in the future, as more and more large driving schools are on the market. While there were still 11,612 main offices in 2020, this number fell to 11,148 in 2022 and the projections assume a further, continuous reduction in the number of main offices. For 2027, the 10,000 mark will be broken for the first time with 9,868 head offices. A similar development is forecast for the branch offices, whose number has already fallen from 7,809 to 7,653 between 2020 and 2022. By 2028, the number of branches is expected to be only 6,831.

However, should the introduction of purely online theory instruction take place on 1 January 2025, these figures would once again drop significantly. In the course of the year, there would then be a downright collapse of almost 14 per cent at the main offices and as much as 18.5 percent at the branch offices. By the year 2028 there would only be 8,465 head offices and 5,669 branches present. This means fewer locations and less driving school density in rural regions.

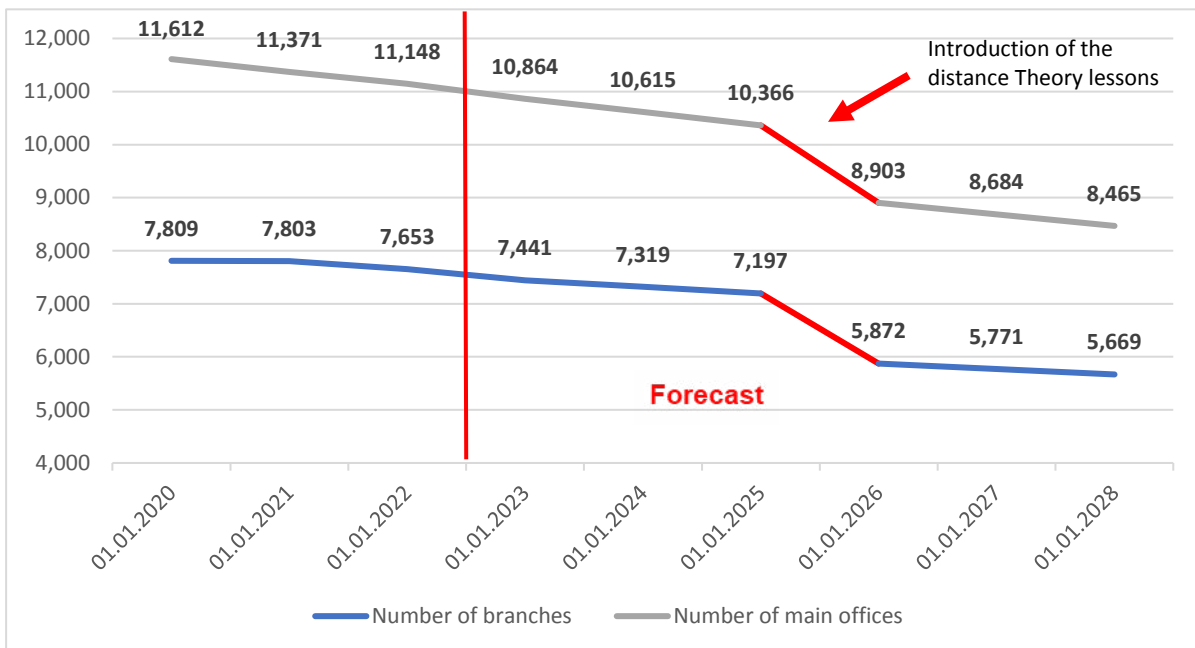
FUTURE PROSPECTS

Development of the main and branch offices plus forecast



Source: Land authorities responsible for driving schools, own calculations, 2023

Development of main and branch offices with 100 % online teaching plus forecast



Source: Land authorities responsible for driving schools, own calculations, 2023

ABOUT MOVING

About MOVING

MOVING International Road Safety Association is an association of European transport publishers and companies active in the field of driver licensing. It deals with the future issues of road safety from the perspective of the driving school industry. MOVING is the publisher of the industry report, which has already been produced for the fourth time in this form. In addition, individualised evaluations are prepared for the individual federal states.

Strengthen driving schools as a key industry

As an important nucleus of road safety, special attention is paid to driving schools. In this sector, MOVING takes on the function of a pulse monitor. By analysing and evaluating past data, MOVING provides a secure foundation for future scenarios. All analyses are public. This Sector Report 2023 is an example of this. In addition, MOVING has become a sought-after contact for the federal government, political parties, associations and the EU.

Publications



Standort Berlin. Europäische Perspektive. Weltweiter Radius.



ABOUT MOVING

Professional events

- MOVING hosted a web conference in times of coronavirus. The conference included presentations on automatic control and the electronic test report. Over 500 interested parties took part.
- The first MOVING online seminar took place on 19 May 2021. The topic was „Special government support measures and funding opportunities during the pandemic“.
- Second workshop in co-operation with Cieca: „The possible uses of simulators in learner driver training“.
- Co-organiser of the „Driving School and Professional Drivers“ symposium in Dortmund.
- Lecture at the driving instructor congress in Berlin.
- MOVING holds direct talks and video conferences with officials in the EU. For example, meetings with Mr Baldwin, European Road Safety Coordinator, or meetings with the cabinet of EU Transport Commissioner Lukaniuk and Mad. Depré, Head of the Road Safety Unit. DG MOVE. European Commission.
- ETSC. Participation in main committees, workshops and seminars.
- DG MOVE. European workshop. The second driving licence workshop on the issuing and mutual recognition of driving licences.
- Participation in EU Road Safety Conferences. 2021 and 2022
- Meeting with Mr Cornet, Road Safety Unit, European Commission, DG MOVE.
- Meeting with Mr Klynen, Flemish Foundation.
- Meeting with Mr Halleemann, Vice-President of the Europe & Central Asia International Road Federation.

Activities

- MOVING is committed to the „Green Deal“ and supports the German government’s plan to achieve a „climate-neutral Germany“ by 2045 with technical proposals. First and foremost, MOVING is focusing on the human factor and its behaviour in road traffic.
- MOVING is a member of the EU Driving Licence Committee and the CPC. Participation in online consultations and preparation of statements and survey results sent to the EU
- MOVING has participated in the CPC Expert Group and the LIVER Licence Committee of DG MOVE of the European Commission.
- Second simulator study with the IfA: „Use of driving simulators to teach shifting skills in driver training“.
- MOVING draws up statements on current road safety issues, such as the EU driving licence directive.
- Representative driving school market and fleet surveys as well as surveys on current topics are conducted every six months.
- MOVING conducts a representative learner driver survey every two years.
- DIN-approved online aptitude test for those interested in becoming a driving instructor.
- Continuous public relations work on specialised topics relating to driving schools and road safety.
- Regular driving instructor survey/BAGFA
- Publication of the facts of the month with informative infographics
- Various analyses of press enquiries.
- Publication of a European newsletter on current topics in the driving school industry.



International Road Safety Association e. V.

MOVING is an association of European transport publishers and companies active in the field of driving licence training. MOVING wants to make a significant contribution to increasing road safety by further professionalising driving licence training in all driving licence classes and promoting road safety education.

Imprint

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