



THE FIVA 2020/21 HISTORIC
VEHICLE TRADE SURVEY

2020/21

FACT FILE

HISTORIC VEHICLE TRADE SECTOR

Keeping yesterday's vehicles on today's roads



EUROPE

OPTIMISM & CHALLENGES

IMPACT OF COVID-19

SECURING SKILLS & FUTURE ISSUES



TRADE FACT FILE: EUROPE



WHAT ARE THE CHALLENGES FACED BY BUSINESSES OPERATING IN THE HISTORIC VEHICLE SECTOR AND ARE SKILLS BEING PROTECTED? THERE IS LOTS TO REVEAL...

This FIVA Fact File report contains results from 778 completed surveys with members of the historic vehicle trade across Europe. It includes businesses based in the UK (203), France (164), Belgium (110), Germany (102), Denmark (58), Portugal (40), Spain (38) and others. The survey was completed by business owners and senior managers of commercial enterprises, event organisers and museums that focus on historic vehicles.

SNAPSHOT OF THE HISTORIC VEHICLE TRADE SECTOR IN EUROPE

The historic vehicle trade sector comprises a wealth of specialist skill sets that need preserving to help keep historic vehicles on today's roads.

A **snapshot** from survey results reveal that the average number of employees per firm now stands at 8.4 (up from 4.5 in 2013), the average annual turnover is 905K € per annum, and 28% of business turnover is generated by sales of products and services to foreign customers.

We also know that the average age of an employee working in the sector now stands at 43 (down from 46yrs) and more than half of businesses (54%) operate with just 1 or 2 employees.



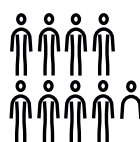
905K €

Average turnover
(33% > 100K €)



28%

average % of turnover
derived from foreign
clients



8.4

Average employees
(56% have 1-2
employees)



43yrs

Average age
of employees
(down from 46yrs)

CAUTIOUS OPTIMISM ACROSS THE SECTOR

We know that in the next 5 years a third of businesses (32%) expect their turnover to grow, compared to a quarter (25%) that expect their turnover to shrink (+7% net increase). There is cause for optimism as these findings represent a far more positive picture than seen in 2013 where just 10% expected turnover to grow (see chart below).

COVID-19 HAS SERIOUSLY IMPACTED

We also know that the impact of the global pandemic has been significant with more than 4 in 10 (43%) saying it has had a **serious** impact on their business.

It is more encouraging to report that fewer businesses are having to take drastic action to survive (9%), and fewer still say they will likely shut as a result of the pandemic (1%). These results illustrate a resilience in the sector that will allow a bounce back in the near future.

MANY ARE STRUGGLING TO FIND STAFF!

Many businesses (40%) told us that they had needed to recruit staff in the 12 months to December 2019. Of these, 8 in 10 (80%) overall struggled to recruit the staff they needed - more than 6 in 10 (62%) struggled to find staff with the necessary manual skills, and 46% struggled to find staff with the necessary knowledge to do the job. A further 18% struggled to find staff at realistic rates of pay.



32%

The proportion of businesses
that expect their t/o to increase
over the next 5 years



11%

The proportion of business that
are taking drastic action or are
likely to shut due to Covid-19



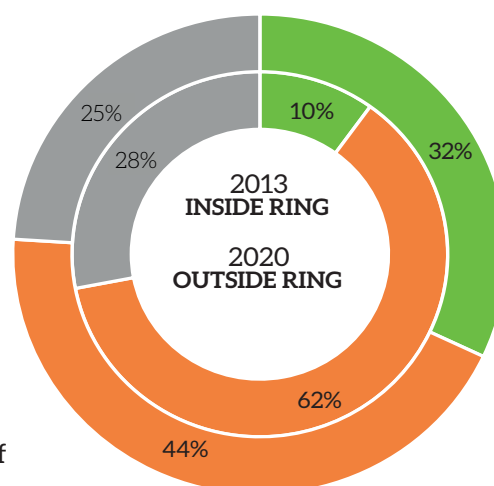
80%

Struggled to find staff with
the skills they needed

Business Turnover (the next 5 years)

Q. I expect the financial turnover attributable to historic vehicles to...

GROW **STABLE** **SHRINK**

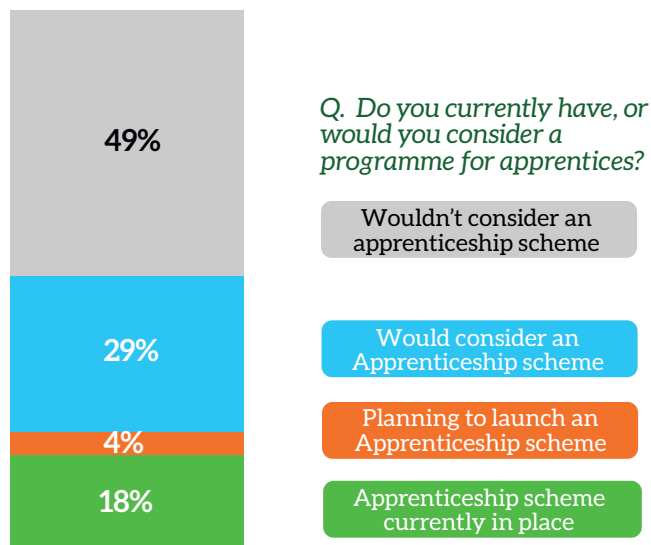


Note: the results presented are based on a combined sample of completed surveys across participating countries. Surveys were completed on a self-selecting basis and survey promotion was conducted separately within each country. Results for the UK have been merged from a separate survey questionnaire and are not always available. The estimated figure for turnover, export and employee numbers and Covid impact are based on commercial enterprises and where figures have been provided. It is unknown how much time employees spend working on historic vehicles, nor if these companies are representative of the historic vehicle sector in Europe in terms of the products and services they offer. The reader should review the findings with caution and with a critical eye although results do provide an indicative insight on the trade sector. Note: some bases sizes will vary due to non-response. Commercial enterprises include sales, repair, restoration or maintenance of historic vehicles and/or services related to these vehicles such as insurance, publishing, tourism, storage or transport.

SECURING SKILL SETS & FUTURE ISSUES



Businesses with apprentice programmes



Base: Commercial businesses (n=627)

SECURING SKILLS FOR THE SECTOR

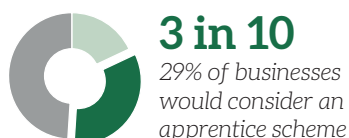
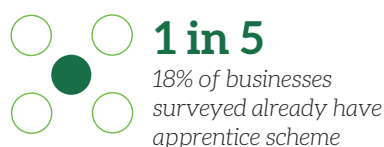
Providing training that is designed to protect skills is a challenge in any sector where small businesses are the norm, but with more than 1 in 2 (51%) saying they would either consider (29%), are planning (4%), or already provide (18%) an apprentice programme reveals a positive attitude towards skills development from the historic vehicle trade.

ENCOURAGEMENT

With as many as 1 in 5 (18%) businesses saying they already offer an apprenticeship scheme, it is now key to encourage those that would consider doing so in the future (29%).

MOMENTUM

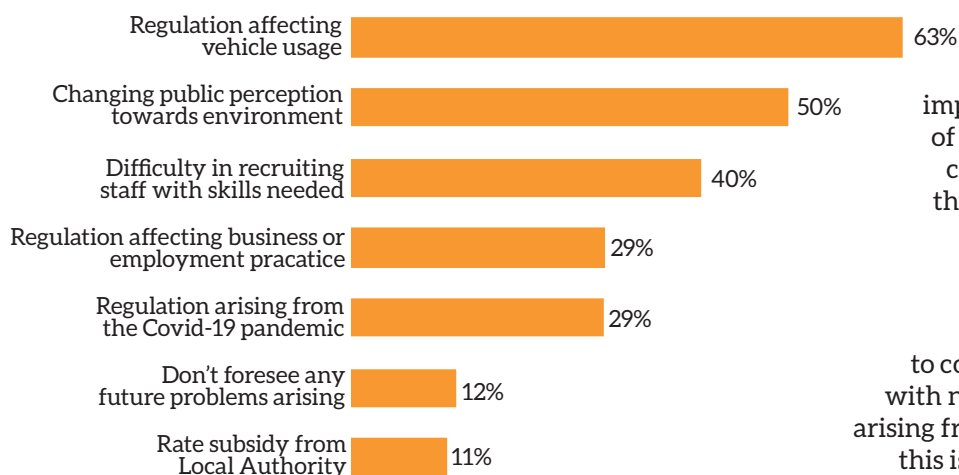
It also seems likely that demand for apprentices from businesses in the sector will stay strong with 9 in 10 (93%) of those with apprentices currently saying they will need more, or at least the same number of apprentices in each of the next 5 years.



FUTURE ISSUES FOR THE TRADE SECTOR IN EUROPE

Whilst we can see cautious optimism from businesses in the sector and a positive attitude towards skills development, the sector as a whole is not without major challenges and concerns which could threaten the future. Businesses tell us that the following areas worry them the most...

Q. Thinking to the future, do you foresee problems arising for your business from any of the following?



FUTURE REGULATIONS & ENVIRONMENTAL CONCERNS

Perhaps the most serious of these threats come from regulation that could impact vehicle use (63%), and the linked issue of public perception towards environmental concerns (50%). Many businesses recognise the potential for these issues to disrupt their trade moving forwards.

BEYOND THE COVID-19 PANDEMIC

The global pandemic will continue to concern businesses looking in to the future, with nearly 3 in 10 (29%) expecting future issues arising from Covid 19 regulations. Not surprisingly, this issue particularly impacts events (52%) and museums (43%) that rely on footfall.

RAISING AWARENESS AND ENABLING FOCUS

The 2020/21 FIVA Historic Vehicle Trade survey provides a unique opportunity to review the position of businesses operating in the historic vehicle sector and the issues they may face in the short and medium term. The impact of Covid 19 makes this much harder, but there remains much to consider and determine how and where support can be provided from the enthusiast community. Skills protection and development is clearly an area of focus, as should be the regular monitoring of concern surrounding environmental issues and the perception of historic vehicles in this regard.

HEADLINE RESULTS FROM THE 2020/21 FIVA HISTORIC VEHICLE TRADE SURVEY: EUROPE



63%
REGULATIONS
AFFECTING
VEHICLE USE

The proportion of businesses that are concerned about regulation that could limit historic vehicle use.



50%
CONCERNED ABOUT
PUBLIC PERCEPTION

The proportion of businesses that are concerned about the public perception towards use of historic vehicles and environment concerns.



80%
EXPERIENCED DIFFICULTIES RECRUITING
THE STAFF THEY NEEDED

The proportion of businesses that have needed to recruit staff and have struggled to do so in some way.

40%

of all businesses expect difficulty in recruiting staff with the skills they need over the next 5 years.



8.4

The average number of employees within a business



43 yrs

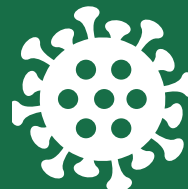
The average age of an employee working in the sector



32%

The proportion of businesses that expect turnover to grow in the next 5 years.

25% expect t/o to decline.



43%

of historic vehicle businesses have been significantly impacted by the pandemic.



29%

of historic vehicle businesses are concerned about Covid-19 regulations affecting them in the future.



28%

OF TURNOVER
DERIVED FROM
FOREIGN CLIENTS

Many are exporting their products and services to historic vehicle owners outside their own country.



1 in 5

18% of historic vehicle businesses operate an apprentice scheme.



4% are planning a scheme
29% would consider a scheme



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