



THE FIVA SOCIO-ECONOMIC HISTORIC VEHICLE SURVEY 2020/21

FACT FILE: TRADE FILE

HISTORIC VEHICLE TRADE SECTOR

What are the challenges faced by businesses in the Historic Vehicle sector and are skills being protected?

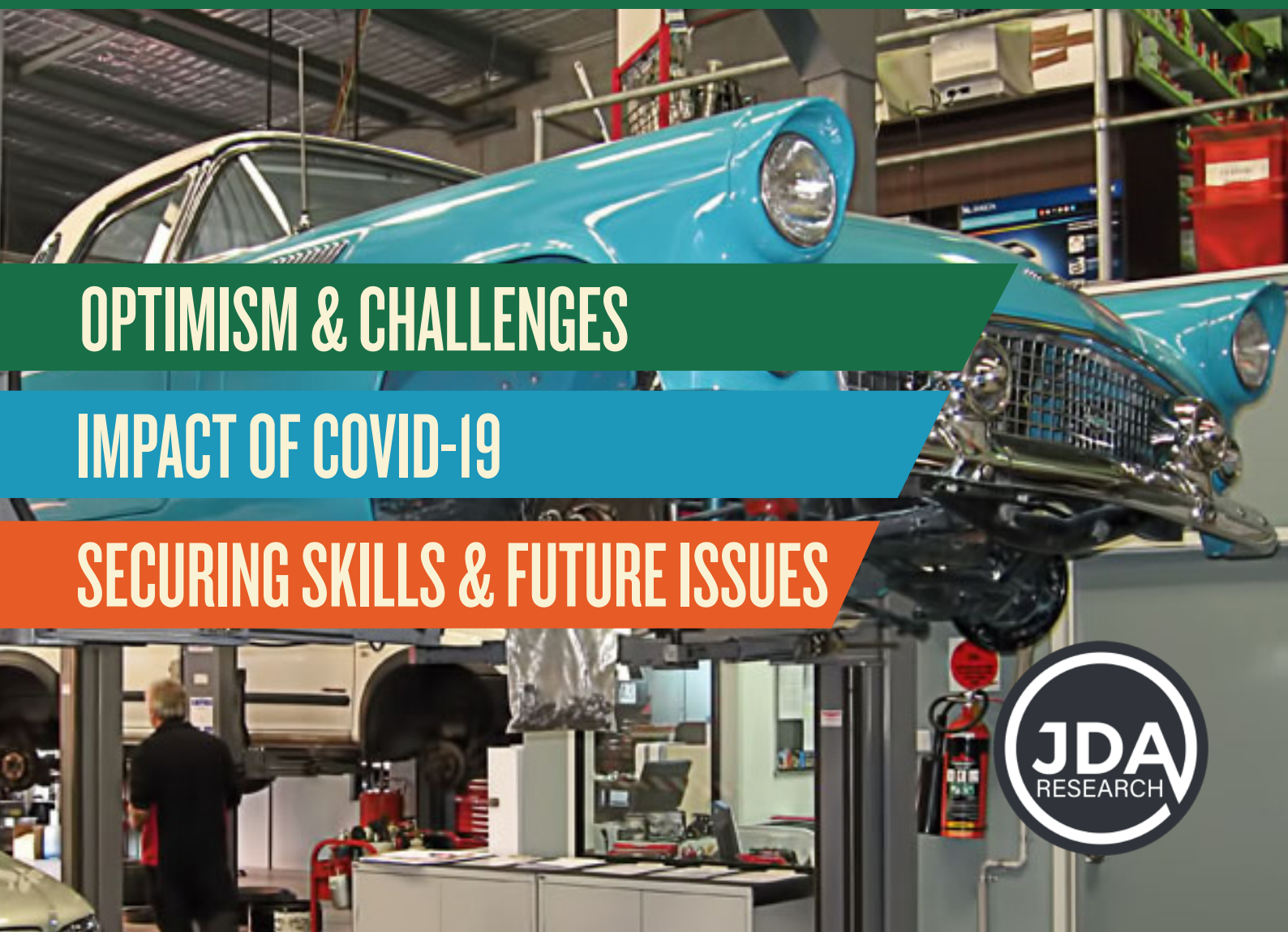


AROUND THE WORLD

OPTIMISM & CHALLENGES

IMPACT OF COVID-19

SECURING SKILLS & FUTURE ISSUES



THE WORLDWIDE TRADE SCENE



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

This short fact file report contains results from 781 completed surveys with members of the historic vehicle trade. The survey has been completed by business owners and senior managers of commercial enterprises, event organisers and museums that focus on historic vehicles. Where possible comparisons to the 2013 FIVA survey have been provided.

A snapshot of the historic vehicle trade sector

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 the survey reveals that the average number of employees per firm now stands at 8.4 (up from 4.5), the average annual turnover is 905K € per annum, and more than 1 in 4 businesses (28%) are international exporters of their products or services.

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 operate with just 1 or 2 employees.



Cautious optimism

We know that in the next 5 years a third of businesses (32%) expect their turnover to grow, compared to a quarter (24%) that expect their turnover to shrink (+8% 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.

Covid-19 has seriously impacted

We also know that the impact of the global pandemic has been significant with more than 4 in 10 (44%) saying it has had a **serious** impact on their business.

It is only slightly more encouraging to report that fewer are having to take drastic action to survive (9%), and fewer still say they will likely shut as a result of the pandemic (2%).

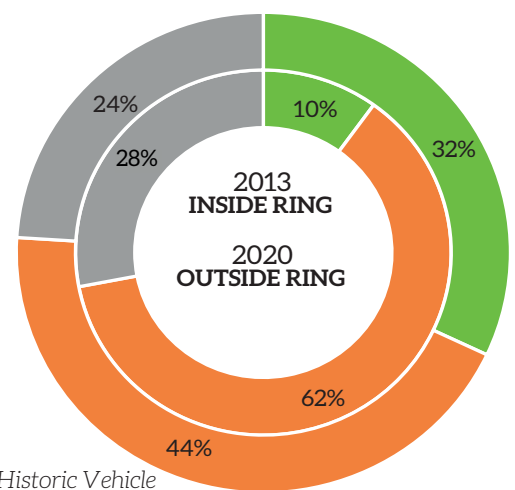
It is a challenge to recruit staff!

Many businesses (40%) told us that they had needed to recruit staff in the 12 months to December 2019. Of these, 8 in 10 (79%) struggled to recruit the staff they needed - more than 6 in 10 (61%) struggled to find staff with the necessary manual skills, and 47% struggled to find staff with the necessary knowledge to do the job. Fortunately, relatively few have issues with rates of pay (18%).

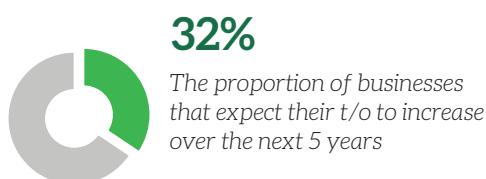
Business Turnover (next 5 years)

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

GROW **STABLE** **SHRINK**



Historic Vehicle Businesses (n=737)



11%
The proportion of business that are taking drastic action or are likely to shut due to Covid-19



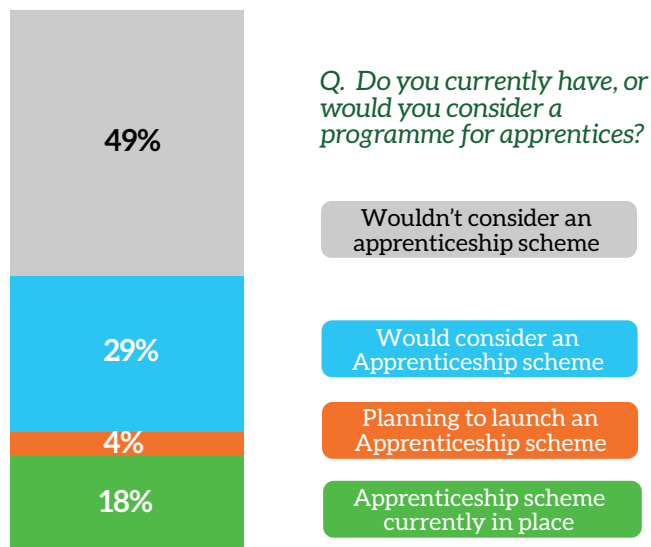
79%
The proportion of businesses that have struggled to recruit the staff they needed

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.

SKILLS RETENTION & DEVELOPMENT



Businesses with apprentice programmes



Historic Vehicle Businesses (n=628)

Interest in apprenticeships

Providing training that is designed to safeguard 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 to (4%), or already are running an apprentice programme (18%), the survey reveals a positive from the trade sector.

As many as 1 in 5 (18%) are already offering an apprenticeship scheme, and it is now key to encourage activity from those that would consider doing so in the future (29%).

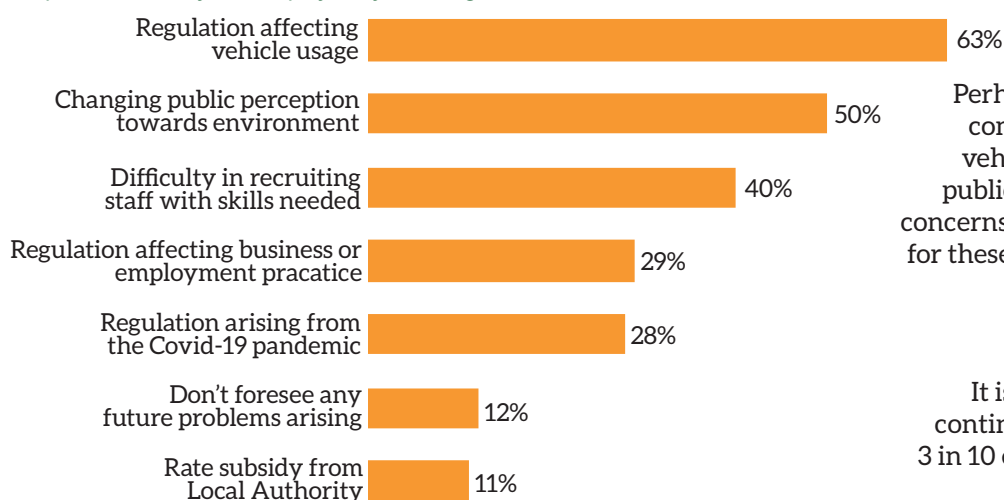
It also seems like demand for apprentices from businesses in the sector is high with 9 in 10 (92%) saying that will need more, or at least the same number of apprentices in each of the next 5 years.



Future issues for businesses in the sector

Whilst there is cautious optimism from businesses in the sector and a positive attitude towards skills safeguarding, the sector as a whole is not without major challenges which threaten the future.

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



Regulations & Environment

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 recognise the potential for these issues to disrupt their trade moving forwards.

Covid-19

It is likely that the global pandemic will continue to impact businesses with nearly 3 in 10 expecting future issues - with events businesses (52%) and museums (43%) particularly worried.

Raising awareness and enabling focus for the Trade sector

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 themselves face in the short term. It is very encouraging to see so many making efforts to safeguard the skills they provide, and thereby their own businesses and livelihoods, but equally it is concerning that many see issues in the near future that may impact the way they operate. It is not all plain sailing.

The results presented in this Fact File are based on 781 surveys from a random selection of businesses operating in the historic vehicle trade sector.

WORLDWIDE TRADE HEADLINES



This Trade Fact File contains **results and themes from 781** surveys from those responsible for operating commercial enterprises and providing products and services to the historic vehicle sector around the world. We are able to provide an overview of opinion, what concerns them the most, and their attitude towards skills development and retention.



63%
REGULATIONS
AFFECTING
VEHICLE USE

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



50%
PUBLIC ENVIRONMENTAL
PERCEPTION

The proportion of businesses that are concerned about the public perception towards environment concerns.



79%

The proportion of businesses that have struggled to recruit the staff they need.

40%

Expect to struggle to recruit skilled staff in the next 5 years.



8.4

The average number of employees within a business



43yrs

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.

24% expect a decline.



44%

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



28%

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



28%
EXPORT

The proportion of businesses that provide products and services to owners outside their 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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