



THE FIVA SOCIO-ECONOMIC HISTORIC VEHICLE SURVEY 2020/21

FACT FILE: TRADE HISTORIC VEHICLES TRADE SECTOR

What are the challenges faced by
businesses in the Historic Vehicle sector?



BELGIUM

TRADE ATTITUDES

FUTURE CONCERNS

SKILLS & WORKFORCE



FIVA TRADE FACT FILE: BELGIUM



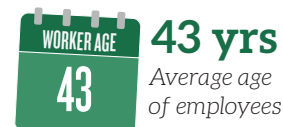
WHAT ARE THE CHALLENGES FACED BY BUSINESSES OPERATING IN THE HISTORIC VEHICLE SECTOR IN BELGIUM...READ ON:

This FIVA Fact File contains results from a sample of 110 surveys completed by businesses that provide products and services to the historic vehicle sector in Belgium. The survey was conducted between September and December 2020 and was completed by business owners and senior managers of commercial enterprises, event organisers and museums that focus on historic vehicles for at least part of their business. The reader should review findings as indicative of the sector as sample sizes are small.

SNAPSHOT OF THE TRADE SECTOR IN BELGIUM

A snapshot from the survey reveals that the average number of employees per firm stands at an estimated 4 staff, with 38% being operated by a single staff member (sole trader), a further 31% comprising 2-3 employees. Fewer than 1 in 10 firms (8%) have more than 10 employees. Businesses in the sector appear well established with 37% operating for 20+ years, 28% for 11-20 years and 28% operating for between 3-10 years. Around 1 in 12 (8%) are new, or start up businesses formed within the last 3 years.

Around 1 in 5 firms (22%) generate a turnover of up to 100 K€, 37% 100-500 K€ and 41% generate turnovers of 500 K€ or higher. The average age of a worker in the sector is 43 yrs.



CHALLENGING FUTURE FOR THE TRADE

We know that in the next 5 years 1 in 5 businesses (20%) expect their turnover to grow, compared to 1 in 2 (50%) that expect their turnover to shrink. This represents some cause for concern and potentially a challenging short term future for some in the sector...why?

COVID-19 HAS SERIOUSLY IMPACTED

We know that the impact of the global pandemic has been significant on many business. As many as 1 in 2 (50%) tell us that it has had a **serious** impact on their business.

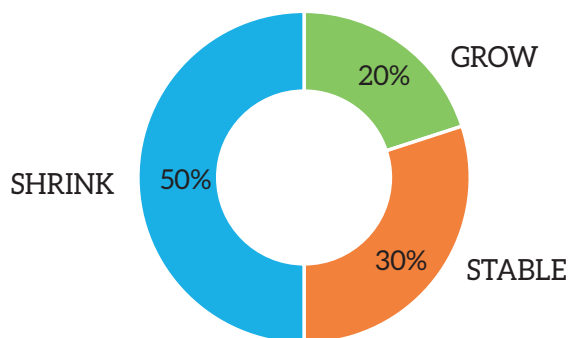
Slightly fewer report that they are having to take drastic action to survive (13%), but the impact appears to have influenced their short term outlook.

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, more than 8 in 10 (84%) also reported difficulties recruiting the staff they needed. Of these, 84% struggled to find staff with the necessary manual skills, and 35% struggled to find staff with the necessary knowledge to do the job.

Business Turnover (next 5 years)

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



Historic Vehicle Businesses (n=87)



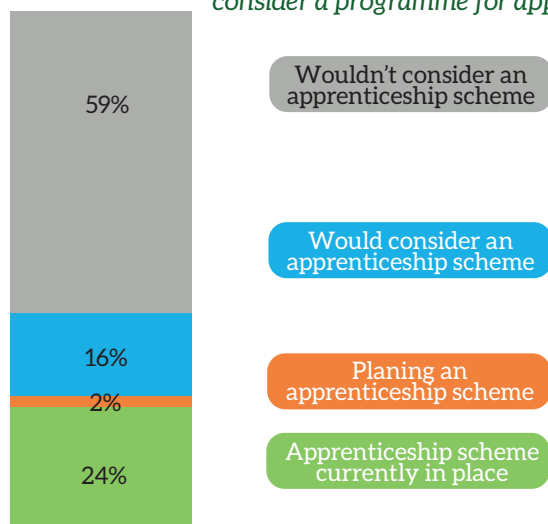
Note: The survey was completed on a self-selecting basis via promotion by FIVA member Federations in respective countries. The estimated figures for turnover, export, employee numbers and Covid impact are based on commercial enterprises and where figures have been provided by respondents. It is unknown how much time employees spend working on historic vehicles, nor if the companies taking part are representative of the historic vehicle sector in terms of the products and services they offer, or their size and scale. The reader should review the findings with caution as some samples are small. Base sizes will vary due to non-response. Front page picture credit: tbc

PROTECTING ESSENTIAL SKILL SETS



Businesses with apprentice programmes

Q. Do you currently have, or would you consider a programme for apprentices?



Historic Vehicle Businesses (n=93)

RETAINING AND DEVELOPING SKILLS

Providing training that is designed to protect and develop skills is a challenge in any sector where small businesses are the norm, but with around 1 in 5 (24%) saying they currently offer an apprentice scheme there is clear support for skills development already in place.

There also appears to be a pool of businesses that would consider an apprenticeship scheme at some point in the future (16%), and it may become increasingly important to activate this interest in the future.

It also seems that demand for apprentices from businesses that already have schemes will remain high, with more than 9 in 10 (95%) saying that they will need more, or at least the same number of apprentices, in each of the next 5 years.

1 in 4 businesses have apprentice programmes in place

21yrs the average age of an apprentice

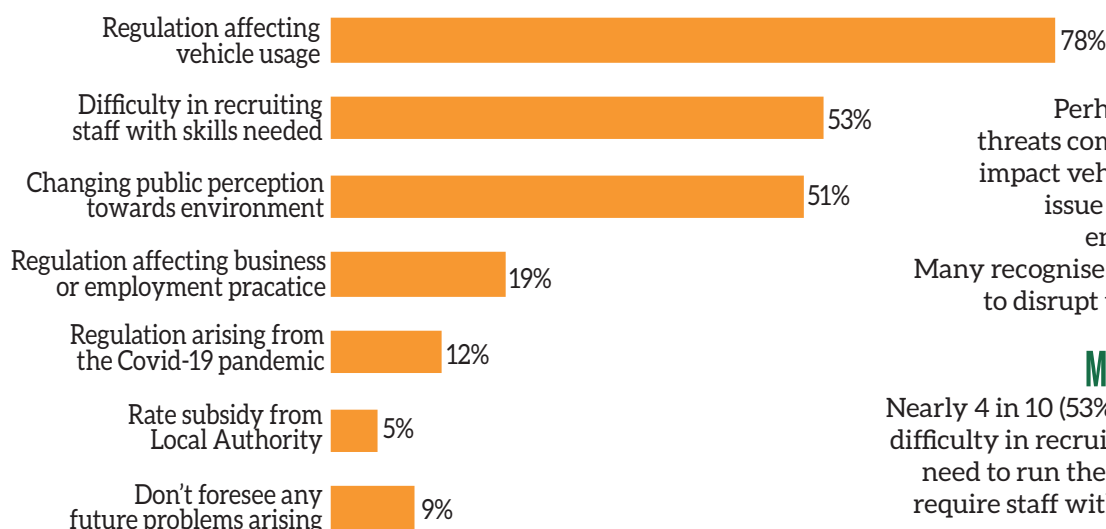
1 in 6 businesses (16%) would consider running an apprentice programme

9 in 10 of those with an apprenticeship program say they will need more apprentices in the future

FUTURE PROBLEMS THAT COULD IMPACT BUSINESSES

Whilst there is a cautious outlook from many businesses in the sector, the survey reveals further focus on the issues that could impact the trade sector in the near future - they include:

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



Historic Vehicle Businesses (n=93)

FUTURE REGULATIONS & ENVIRONMENTAL CONCERN

Perhaps the most serious of these threats come from regulation that could impact vehicle use (78%), and the linked issue of public perception towards environmental concerns (51%).

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

MEETING RECRUITMENT NEEDS

Nearly 4 in 10 (53%) businesses also point to the difficulty in recruiting staff with the skills they need to run their business... many will likely require staff with knowledge and experience looking ahead.

BEYOND THE COVID-19 PANDEMIC

It is also likely that the global pandemic will continue to impact businesses with 1 in 4 (12%) expecting future issues arising from the ongoing Covid-19 crisis.

THE FIVA TRADE SURVEY

The results presented in this Fact File are based on 110 surveys completed by owners and senior managers of businesses that operate in the historic vehicle sector in Belgium. In some instances base sizes are small and the reader should treat these findings with some caution.

BELGIUM: HEADLINES



This short fact file report contains results from a random sample of 110 surveys completed by members of the historic vehicle trade in Belgium. The survey has been completed by business owners and senior managers of commercial enterprises, event organisers and museums that focus on historic vehicles.



78%
REGULATIONS
AFFECTING
VEHICLE USE

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



51%
PUBLIC ENVIRONMENTAL
PERCEPTION

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



40%

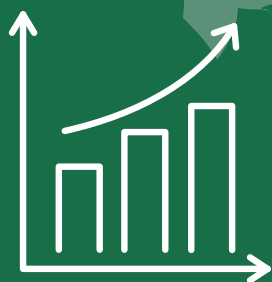
HAVE NEEDED TO RECRUIT
SKILLED STAFF

More than 8 in 10 report difficulties finding the staff they need



4 staff

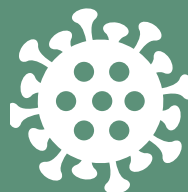
The average number of employees within a business



20%

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

50% expect a decline in turnover.



50%

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



12%

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



39%

EXPORT PRODUCTS &
SERVICES OUTSIDE THEIR
OWN COUNTRY

The proportion of businesses that generate turnover from overseas customers.



1 in 4

24% of historic vehicle businesses operate an apprentice scheme.
16% would consider a scheme.



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