



THE FIVA 2020/21 SOCIO-ECONOMIC HISTORIC VEHICLE SURVEY

2020/21

FACT FILE

HISTORIC VEHICLE OWNERS & ENTHUSIASTS

Keeping yesterday's vehicles on today's roads



EUROPE

HEADLINES RESULTS

HISTORIC VEHICLE OWNERS

HISTORIC VEHICLE FLEET



PROTECT, PRESERVE & PROMOTE

Keeping Yesterday's Vehicles on Today's Roads



Welcome to the European Fact File from the **FIVA 2020/21 Socio-Economic Survey**. The aim of FIVA is to Protect, Preserve and Promote the use of historic vehicles on today's roads and this Fact File provides critical insights to support that aim.

The FIVA survey generated nearly 55 000 responses Worldwide and collected nearly 128 000 detailed evaluations of historic vehicles. This summary report outlines the key findings for **Europe** and is based on 49 887 surveys with owners and enthusiasts, and 115 293 evaluations of the historic vehicles they own.

AIM OF THIS FACT FILE

The aim of this Fact File is to provide FIVA stakeholders with a usable overview of survey findings based upon European member countries. This has been presented across across 3 key sections.

We have used survey results to build this report and to help generate relevant and appropriate narratives to support the stated aims of FIVA.

Every care has been taken to do this in a consistent way although survey findings remain reliant on the sampling within each country.

HEADLINES RESULTS

- purchasing power
- distances travelled per annum
- culture and heritage involvement

HISTORIC VEHICLE OWNERS

- owner characteristics (age, income)
- club membership
- youngtimer ownership

HISTORIC VEHICLE FLEET

- historic vehicle characteristics
- usage & frequency patterns
- originality & modification

NOTES TO THE READER

The survey was conducted online between August and November 2020 with the assistance of FIVA member organisations to promote the survey to historic vehicle owners and enthusiasts within their own countries. All members across 74 different countries were encouraged to participate in the process.

The survey was translated into 24 language versions to enable participation from as many owner enthusiasts as possible. Every care has been taken during this process to ensure a good representation within each country, although the reader should review these findings with a critical eye as the profile of vehicle types and makes that are represented is reliant on those owners that participated in the survey.

Survey participants were asked to complete a range of questions relating to themselves and their vehicles. There was an opportunity for participants to stop the survey half way through, or opt not respond to certain questions if they didn't want to. The sample size indicated represents the maximum response to questions, but base sizes will vary and we indicate where these are too small to report. Questions relating to vehicle usage and associated vehicle spending were asked on the basis of the 12 month period to December 2019. This was in order to collect a realistic measure that was unaffected by the 2020/21 Covid-19 pandemic.

VEHICLE DEFINITIONS

The FIVA definition of Historic vehicles is based on vehicles that fit the following criteria: *are a mechanically propelled road vehicle; which is at least 30 years old; which is preserved and maintained in a historically correct condition; which is not used as a means of daily transport and which is therefore a part of our technical and cultural heritage.*

We acknowledge that this definition does not cover all vehicles that are 30 years or older, but it has been applied as the common denominator for all country results within the FIVA survey.

The FIVA definition of Youngtimer vehicle is as follows: a mechanically propelled road vehicle which is between 20 and 29 years of age; which is in good condition and preservation; which is usually used during leisure time; and may become eligible for a FIVA Identity Card upon reaching 30 years of age.

ABOUT JDA

www.jdaresearch.co.uk

JDA is a research consultancy that works with market research data to develop strategic thinking for industry. We design, manage, execute, analyse and deliver projects across multiple sectors including Automotive, Sport, Manufacturing and Energy.

HEADLINE RESULTS: EUROPE



This Fact File provides the key headline results from the 2020/21 FIVA Socio-Economic Historic Vehicle survey. It is based on 49 887 surveys with owners and enthusiasts across **European** (see spread of countries below), who have provided 115 293 historic vehicle evaluations (see Historic Vehicle Fleet section for more info).

PURCHASING POWER: ANNUAL SPENDING BY OWNERS

The average historic vehicle owner spends an estimated **3,688 €** per annum on the maintenance and running of their vehicle(s), **615 €** on attending historic vehicle events (entry, accommodation, food etc), and a further **334 €** on other items related to their interest in historic vehicles e.g. club membership, magazines etc. This adds to a total expenditure of **4,637 €** per owner, per annum.

DIRECT SPENDING on historic vehicles

Direct spending includes expenditure directly on historic vehicles including insurance, upkeep, repairs, storage, the cost of fuel, servicing and restoration. (note: it is spending across all historic vehicles owned)



The average amount an owner spends per annum directly on their historic vehicle(s)

TOTAL SPENDING on historic vehicles



Total owner expenditure per annum on their interest in historic vehicles (per owner)

Total spending includes all direct spending, plus all other related activity including event attendance, overnight stays and other items related to an interest in historic vehicles. It excludes expenditure on vehicles. (note: calculated on a per capita basis).

DISTANCES TRAVELLED PER ANNUM

On average, historic cars travel 1 462 km per annum and historic motorcycles travel 612 km per annum. The average distance that historic vehicle owners say they travel in their historic vehicles is 2 591 km per annum.

CARS



Vehicle distances based on registered vehicles only.



per car, per annum

MOTORCYCLES



per motorcycle, per annum

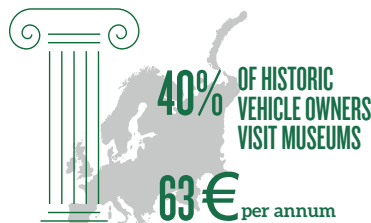
HERITAGE AND CULTURE

4 in 10 owners (40%) visit museums relating to historic vehicles each year, and on average spend 63 € on entrance fees.

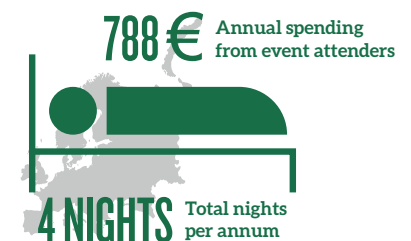
In addition, nearly 8 in 10 (78%) attend historic vehicle events (spending around 788 € per annum).

This includes more than half (52%) that stay overnight - on average a total of 4 nights per annum.

MUSEUMS



HISTORIC VEHICLE EVENTS



The FIVA definition of Historic vehicles is based on vehicles that fit the following criteria: are a mechanically propelled road vehicle; which is at least 30 years old, which is preserved and maintained in a historically correct condition, which is not used as a means of daily transport and which is therefore a part of our technical and cultural heritage. Note: Direct spending is across all vehicles owned (on average owners own 3 historic vehicles each in Europe). Total spending is based on a 'per owner' basis to be able to provide an overall spend estimate associated with an interest in historic vehicles. Owner and vehicle distances travelled are derived from different questions. All results presented in this document are based on the survey sample and reflect historic vehicle owners that participated in the research.

The results in this FIVA Fact File primarily reflect the individual survey samples for the following countries: Belgium, Czech Rep, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, Turkey, and the United Kingdom. Country samples have been combined and may not be proportional to the number of owners or historic vehicles in each country.

DIRECT SPENDING

ON HISTORIC VEHICLES



3.688 €

PER OWNER, PER ANNUM

Average 'per owner' spend on insurance, upkeep, repairs, storage, fuel, servicing and restoration across all historic vehicles owned.

TOTAL SPEND

ON HISTORIC VEHICLES INTEREST



4.637 €

PER OWNER, PER ANNUM

Includes direct spending, event attendance (ticket), overnight stays (inc food & drink) and other items related to an interest in historic vehicles. Note: excludes expenditure associated with vehicle purchase.

DISTANCES TRAVELLED PER ANNUM

Based on all licensed historic vehicles in the survey



PER ANNUM, PER VEHICLE



CARS

1 462 km



MOTORCYCLES

882 km

BUYING HISTORIC VEHICLES

AVERAGE VALUE OF VEHICLES PURCHASED (2019)



21K €

CARS
56% of car purchases are less than 10K €



5K €

MOTORCYCLES
59% of motorcycle purchases are less than 3K €

VISITING MUSEUMS



40%

of historic vehicle owners visit museums related to their interest.

They spend an average 63€ per annum.

HISTORIC VEHICLES EVENTS



78%

ATTENDED BY 78% OF HISTORIC VEHICLE OWNERS

OVERNIGHT STAYS

52% OF EVENT ATTENDERS STAY OVERNIGHT AT HISTORIC VEHICLE EVENTS



4 NIGHTS

PER ANNUM

HISTORIC VEHICLE OWNERS: EUROPE



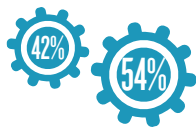
The FIVA 2020/21 Socio-Economic survey collected 49 887 surveys from owners and enthusiasts of historic vehicles across Europe. We have used that base to provide an overview on historic vehicle owners. Results for car owners are based on a 39 779 surveys, and for motorcycle owners are based on 9 488 surveys.

HISTORIC VEHICLE OWNERS

More than 9 in 10 owners are male (97%) with an average age of 59. Around 1 in 5 owners (22%) are aged 50 or younger. More than half of owners (54%) are working, most in full time (37%), or self-employed roles (14%), 42% are retired and 4% other. The average household income of a historic vehicle owner is 57.1K € per annum - around half (47%) have an annual household income of 40K € or less. Around 1 in 3 (32%) owners live in an urban city setting compared to 43% that live in a rural location. Around 1 in 4 (26%) live in a town.



The average age of an owner is 59 years
60yrs Car / 59yrs Motorcycle



More than half (54%) owners are working, 42% are retired
Car 54% working / 42% retired
Motorcycle 55% working / 41% retired



Average household income (47% less than 40K €)
Car 58.9K € | Motorcycle 51.4K €



32% of historic vehicle owners live in a urban city setting
Car 32% city vs 43% rural
Motorcycle 31% city vs 43% rural

CLUBS & EVENTS

More than 8 in 10 (81%) owners are members of historic vehicle clubs (on average 1.7 national clubs). Around 1 in 7 owners (15%) that are members of clubs are members of international clubs.



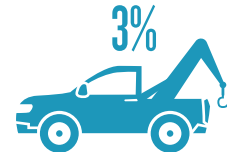
More than 8 in 10 are club members
Car 83% / 79% Motorcycle



Nearly 8 in 10 owners attend historic vehicle events (on average 6 events each year)
Car 79%
Motorcycle 77%



The average amount owners spend at events per annum
Car 836 € / Motorcycle 603 €



Fewer than 1 in 30 owners had an accident in their historic vehicle(s) in 2019

Nearly 8 in 10 (78%) owners attend events, on average 6 events each year (6.1 for car owners | 5.8 for motorcycle owners). Owners travel an average of 267 km to be at their favourite event (270 km for car owners | 272 km for motorcycle owners).

Owners say that National (26%) and Club events (24%) are the most enjoyable to attend (car owners 26% and 25%) and motorcycle owners 26% and 22% respectively). More than half (52%) stay overnight at events (on average 4 nights per annum). Of these, most stay in hotels (64%), camping/caravanning accommodation (19%) or in Bed & Breakfast accommodation (14%).

SOCIAL MEDIA USE

Facebook is the most frequently used social media platform (60% car owners | 61% motorcycle owners) with nearly half of historic vehicle owners (45%) using it on a daily basis. YouTube is used by more owners (76%), but less frequently than Facebook (22% use Youtube daily).

YOUNGTIMERS

Around 1 in 3 historic vehicle owners (30%) say they own a youngtimer vehicle (an average of 1.5 youngtimer vehicles). These are mostly passenger cars (80%) and motorcycles (14%). The main marques for youngtimer cars are Mercedes-Benz (11%), BMW (8%), Porsche (5%), Volvo (5%), VW (5%) and Jaguar (5%). The main marques for youngtimer motorcycles are Honda (21%), BMW (14%), Yamaha (14%), Kawasaki (9%) and Suzuki (7%), Triumph GB (6%) and Harley Davidson (6%). The average age of these vehicles is 24 years i.e. manufactured in 1996.

More than 8 in 10 (82%) youngtimer vehicles are licensed for road use and they are driven/ridden further than historic vehicles (on average 3 875 km per annum with Cars driven on average 4 200 km and motorcycles ridden on average 1 943 km). The majority of youngtimer vehicles are described as being in original (74%) or authentic (13%) condition.

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OWNER AGE



59 YRS

AVERAGE AGE OF
A HISTORIC VEHICLE OWNER



60 YRS



59 YRS

AVERAGE HH INCOME



57.1K €

AVERAGE HOUSEHOLD INCOME
HISTORIC VEHICLE OWNERS
(47% < 40K €)

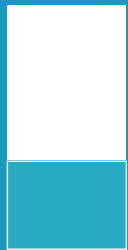


58.9K €



51.4K €

YOUNGTIMER OWNERSHIP



30%

ALSO OWN A YONGTIMER
VEHICLE (1.5 VEHICLES)



Mercedes-Benz,
BMW, Porsche,
Volvo, Jaguar



Honda, BMW,
Yamaha, Kawasaki,
Suzuki

SOCIAL MEDIA



61%

OF OWNERS ARE USING
FACEBOOK
45% At least once a day

76% use YouTube | 22% use Instagram |
16% use Pinterest | 12% use Twitter

HV CLUBS



81%

OF OWNERS BELONG
TO AN HISTORIC
VEHICLE CLUB
90 € SUBSCRIPTION



83%
CAR OWNERS



79%
MOTORCYCLE OWNERS



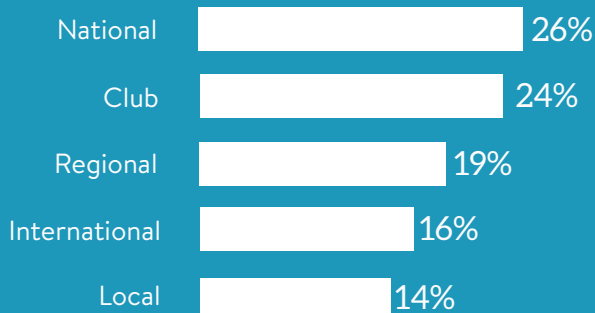
78%

OF OWNERS ATTEND
HISTORIC VEHICLE EVENTS

788 € PER ANNUM ON EVENTS

Includes expenditure on ticket entry, accommodation
and food and drink whilst at the event
(per owner equivalent = 615 €).

TYPES OF EVENTS ATTENDED



FAVOURITE TYPE OF HISTORIC VEHICLE EVENT

ACCIDENTS IN HISTORIC VEHICLES



3%

THE PROPORTION OF HISTORIC VEHICLE
OWNERS THAT HAD AN ACCIDENT IN 2019
Car owners 3% | Motorcycle owners 3%

TYPE OF ACCIDENT

49% small bump | 42% damage to panels | 9% other

HISTORIC VEHICLE FLEET: EUROPE



The FIVA 2020/21 Socio-Economic survey collected 115 293 detailed evaluations of the historic vehicle fleet in Europe (82 093 cars and 20 766 motorcycles). We have used this base of historic vehicles to provide an overview of the historic vehicle fleet across Europe.

THE HISTORIC VEHICLE FLEET

The survey indicates that 71% are cars, 18% are motorcycles and 11% are other types of historic vehicles (mopeds, commercial vehicles, ex-military vehicles etc).

There is a wide mix of marques for historic cars and motorcycles including Citroen, MG, Triumph (GB), Mercedes-Benz, VW, Porsche and Jaguar for cars, and Honda, BMW, BSA, Triumph and Yamaha for motorcycles. The average historic vehicle is 53 years old, having been manufactured in 1967. Historic cars tend to be younger (52 years) than motorcycles (55 years).



Citroen, MG, Triumph and Mercedes-Benz account for an estimated 1 in 4 historic cars



Cars have an average age of 52

HONDA



Honda, BMW and BSA account for an estimated 1 in 4 historic motorcycles



Motorcycles have an average age of 55

HISTORIC VEHICLE VALUES

The average value of an historic vehicle is 22.9K € with cars being considerably more valuable than motorcycles (28.6K € vs 6.6K €). More than half (52%) of historic vehicles are valued to be < 10K €.

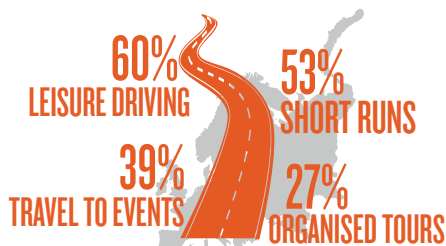
The value of the most common car marques include Citroen (14.9K €), MG (20.4K €), Triumph (18.7K €), Mercedes-Benz (45.1K €), VW (14.3K €), Porsche (60.6K €) and Jaguar (62.7K €). For motorcycles the value of the most common marques include Honda (4K €), BMW (7K €), BSA (5.9K €), Triumph (7.7K €) and Yamaha (3.7K €). Note: these are based on owner estimates and should be treated as indicative of real values.

HISTORIC VEHICLE CONDITION AND USE

More than 8 in 10 (81%) historic vehicles are licensed for road use (cars 83% | motorcycles 74%). On average, historic vehicles travel 1 306 km each year, with cars travelling further than motorcycles (1 462 km compared to 882 km).

On average, historic vehicles are taken out 15 times a year (16 times for cars and 13 times for motorcycles). Historic vehicles are used for a wide combination of reasons. For example, for those that have been used in the last 12 months 60% have been used for leisure driving (63% cars and 56% motorcycles), 53% for short runs (53% cars and 55% motorcycles), 39% to travel to events (44% cars and 26% motorcycles) and 27% for organised tours (29% cars and 18% motorcycles). No historic vehicles had been used as a means of regular daily transport.

More than 8 in 10 (81%) historic vehicles are described as being in an original state compared to 19% that are modified. Around 1 in 3 historic vehicles (31%) are described as original condition, 33% restored, 7% rebuilt, 18% authentic and 11% in need of restoration. For cars - 30% original, 34% restored, 6% rebuilt, 18% authentic and 11% needing restoration. For motorcycles - 33% original, 9% rebuilt, 16% authentic, 31% restored and 10% needing restoration.



Primary reasons for using historic vehicles (all historic vehicles)



the average value of a historic vehicle



historic vehicles described as being in original condition



on average historic vehicles are used 15 times a year

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HISTORIC VEHICLE PROFILE



CARS

71%

Based on survey vehicle sample



MOTORCYCLES

18%

KEY MAKES OF VEHICLE

CARS

Based on vehicle sample

MOTORCYCLES

Based on vehicle sample

CITROEN	7%	HONDA	11%
MG	7%	BMW	8%
TRIUMPH	7%	BSA	7%
MERCEDES-BENZ	6%	TRIUMPH	6%
VW	5%	YAMAHA	5%
PORSCHE	4%	Harley Davidson / Jawa /	
JAGUAR	4%	Kawasaki, Moto Guzzi,	3%
		Suzuki, Vespa, Norton	each

AVERAGE DISTANCE TRAVELLED BY HISTORIC VEHICLES PER ANNUM



CARS

1 462 Km



MOTORCYCLES

882 Km

Based on all licensed historic vehicles in the survey



1967

AVERAGE YEAR OF MANUFACTURE



1968



1965

OWNERSHIP

YEARS

14 YEARS

AVERAGE NUMBER OF YEARS A HISTORIC VEHICLE HAS BEEN OWNED



14 YEARS



15 YEARS

AVERAGE HISTORIC VEHICLE VALUE

22.9K €

CAR

28.6K €

MOTORCYCLE

6.6K €

(Owner valuations)



81%

OF HISTORIC VEHICLES ARE LICENSED FOR ROAD USE

Based on survey vehicle sample



81% ORIGINAL

More than 8 in 10 historic vehicles are described as 'original'. 19% have been modified.

15 TIMES A YEAR



ON AVERAGE, AN HISTORIC VEHICLE IS TAKEN OUT 15 TIMES A YEAR



(16 times a year)



(13 times a year)



11%

NEED RESTORATION

PROPORTION OF HISTORIC VEHICLES THAT REQUIRE RESTORATION



(11%)



(10%)



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THE FIVA 2020/21 HISTORIC
VEHICLE CLUB SURVEY

2020/21

FACT FILE: CLUBS

HISTORIC VEHICLE CLUBS

What are the future challenges faced by historic vehicle clubs, and what services and activities do they offer to members?



EUROPE

CLUB CONCERNS

CLUB SERVICES

CLUB ACTIVITIES



NMF 35

CLUB FACT FILE: EUROPE



THE FIVA 2020/21 HISTORIC VEHICLE CLUB SURVEY HAS MUCH TO REVEAL...

This FIVA Fact File contains results from 1,735 completed surveys from the FIVA 2020/21 Historic Vehicle Club survey. It is based on European countries including France (428), UK (250), Germany (239), Belgium (224), Spain (106), Sweden (94), Denmark (74), Italy (54), Norway (44), the Czech Republic (34) and others. These surveys were completed by enthusiasts involved in managing their historic vehicle clubs and the results therefore provide an up-to-date read on the concerns and activities of clubs operating in the movement today.

WHAT CONCERNS HISTORIC VEHICLE CLUBS TODAY?

Historic vehicle clubs tell us that their most pressing concern is the ability of their club members to use their vehicles on roads without stringent regulation (78%), and without negative public perception due to environmental concerns (51%).

We also know that many clubs struggle to find volunteers to help support the running of their club (42%), and that there is now an emerging concern about the availability of fuel (23%) from a significant number. Across Europe the relative importance of these issues varies, but they are all of concern.



78%

Regulation affecting vehicle use



51%

Changing public perception, environment considerations etc



42%

Finding new board members / volunteers



23%

Availability of fuel (fuel problems)

THE NEXT 5 YEARS

Many clubs (40%) tell us they expect their membership to **grow** over the next 5 years, or at least expect current levels to remain stable (38%). However, around 1 in 4 expect their numbers to shrink (23%).

Q. How do you envisage the number of members of the club in 5 years from now?

40%

Our club will be Larger

38%

Our club will be Unchanged

23%

Our club will be Smaller

All clubs (n= 1 508)

MEMBERS ARE GETTING OLDER

Many clubs (43%) also tell us that the average age of their members is getting older, with only 12% expecting member age to be younger overall in 5 years time. **The average age of a club member in 2020 is 55 years.**

43%

Older average age

45%

Similar average age

12%

Younger

All clubs (n=1 497)

CLUBS COME IN ALL SHAPES AND SIZES

The average club has 400 members, although a third (32%) can be defined as small (50 or fewer members), 54% as medium (51-499 members) and 14% as large (500+ members). Around 3 in 10 clubs (31%) describe themselves as having a local focus, 24% regional and 30% national. Around 1 in 8 (12%) are international and 3% describe themselves as being a branch of a larger club.

The most common vehicle types catered for include passenger cars (86%), motorcycles (42%), vans (26%), mopeds (25%), ex-military vehicles (21%) and tractors (19%). More than half of clubs (51%) cater for vehicles of many makes, types and age, compared to 23% that cater for one-make only. The majority of club members own at least one historic vehicle (75%) with around 3 in 10 owning at least one youngtimer vehicle (29%).



32%

1 in 3 clubs have 50 or fewer members



75%

of members own an historic vehicle



55%

of clubs have a local or regional focus



36 €

Average annual cost of a club membership

Note: Clubs were recruited to participate in the survey using a variety of methods. FIVA ANFs were able to promote and raise awareness to the survey using their known channels and contacts. All participating clubs did so on a self-selecting basis. Results presented in this Fact File are based only on completed surveys. Front page picture credit: John Retter, Brooklands Motor Museum, UK

CLUB ACTIVITIES: EUROPE

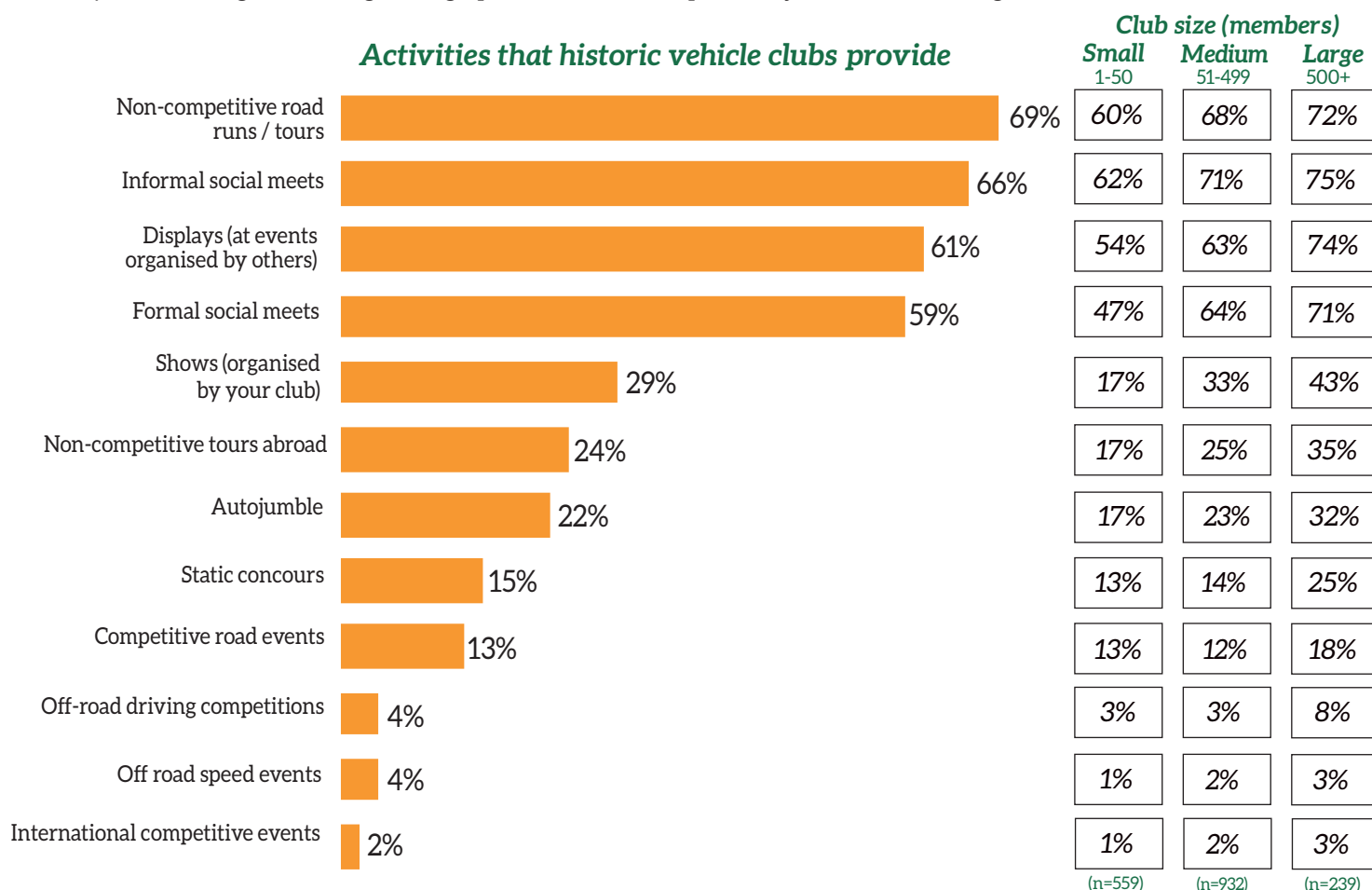


OFFERING AN AFFORDABLE CLUB ENVIRONMENT TO ALL

It is very affordable to become a member of a historic vehicle club with an average annual subscription of just €36, or just 28 € per annum for smaller clubs (those with fewer than 50 members), compared to 48 € per annum for larger clubs (those with 500+ members). What seems clear is that membership brings considerable value to the enthusiast and access to a wealth of related activities.

A WEALTH OF CLUB ACTIVITIES ON OFFER

Club members have access to a wealth of club and vehicle-related activities. On average, a club will organise 15 events each year with larger clubs organising up to 46 events, compared to just 7 events amongst small clubs.



WHAT DOES BEING A CLUB MEMBER ACTUALLY MEAN?

Being a member of an historic vehicle club means access to a wide range of activities that support an interest in historic vehicles. These include:

Getting out and about...

Non-competitive road runs (69%), Displays (61%) and Shows (29%) enable enthusiasts to get together with other members and their vehicles to enjoy and promote the value of historic vehicles around the world.

Getting social...

Many clubs create the opportunity for get-togethers with **formal social events (59%)** and **informal social meetings (66%)** - including AGMs, or simple get-togethers. These types of event are the building blocks of the historic vehicle club scene around the world and are clearly demonstrated here in the survey results.

Getting competitive...

Whilst many provide non-competitive road runs and leisure runs, some clubs also show the competitive side of historic vehicle ownership with **13%** providing **competitive road events**, **4%** providing **off-road driving competitions** and **4% off-road speed events**. That is quite a mix for the more competitive minded.

Buying and selling

Around 1 in 5 clubs (22%) organise **Autojumble events** which give another chance for historic vehicle enthusiasts to get-together to talk about their vehicles and to buy spare parts to help keep their vehicles on the road.

A HUGE RANGE OF SERVICES AVAILABLE

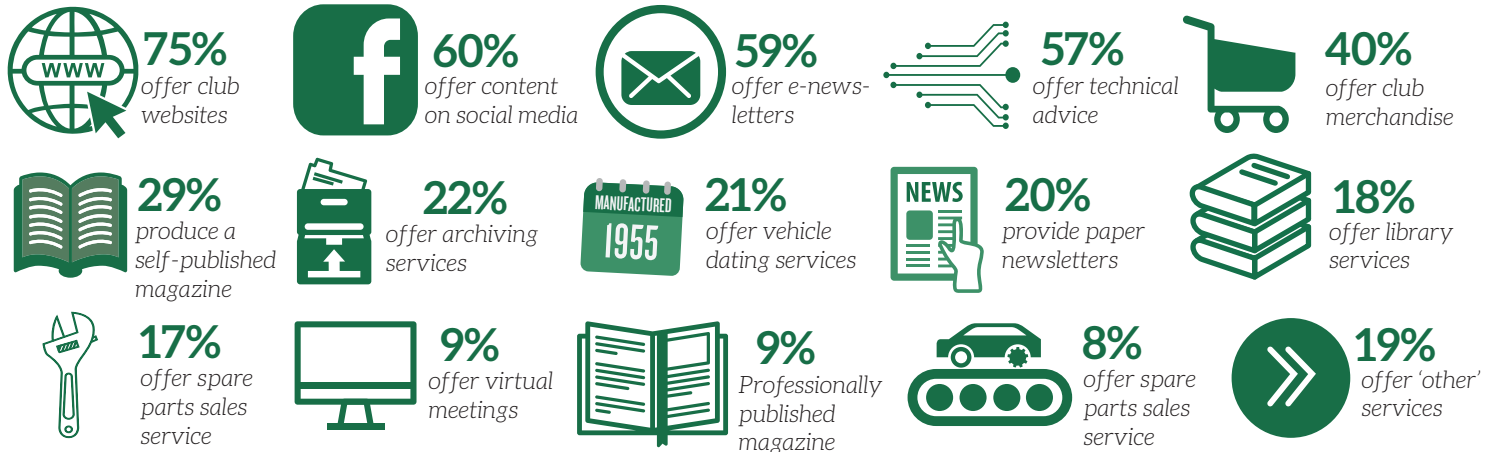


CLUBS PROVIDE A WIDE RANGE OF SERVICES TOO!

In addition to the range of club activities, historic vehicle clubs also provide many valuable services to their members that add value to their membership offer. Many of these are provided by volunteers in their own time and often at no charge.

These services range from creating relevant digital content that can be shared through website or social channels, through to the provision of spare parts for vehicles either through sales/resale or original manufacture. These are invaluable to the enthusiast who is aiming to keep their historic vehicles on the road.

A SNAPSHOT OF SERVICES PROVIDED BY CLUBS



SO HOW DO CLUBS DIFFER?

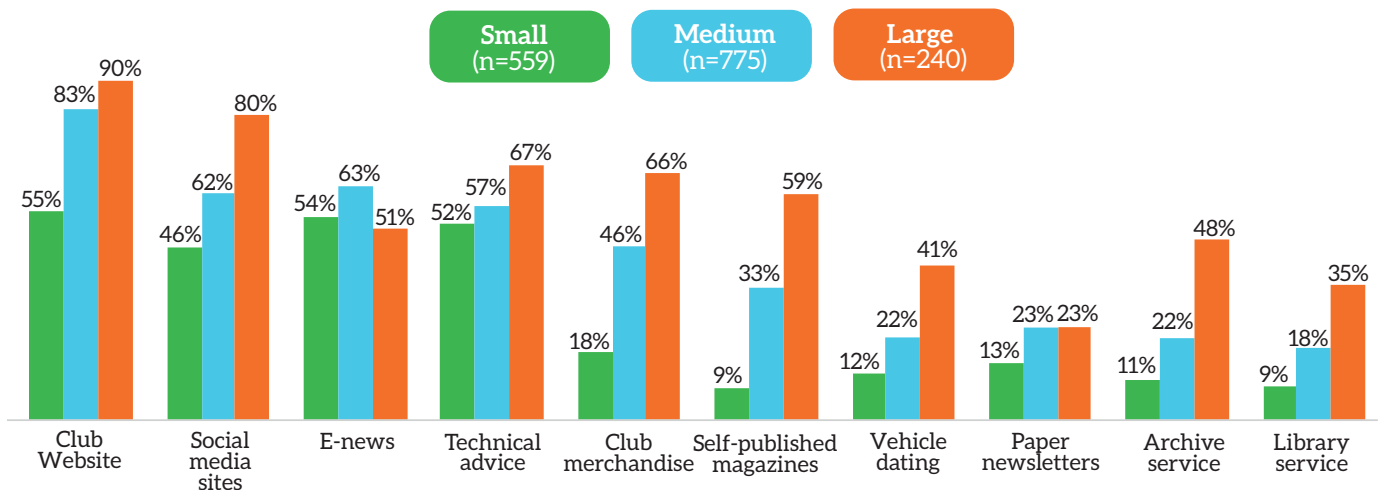
However, there are clear differences in what clubs of different sizes are able to offer their members. Large clubs (500+ members) who are more likely to be national (50%) or international (24%) in focus can provide digital content via websites and social media (80% manage social sites). These support their club-based activities and allow them to reach their membership base with speed and efficiency.

By comparison, small clubs (50 or fewer members) are far less likely to offer members social media content (just 46% do so), and are more local (47%) or regional (27%) in focus. They generally offer fewer services which is best illustrated by the proportion that operate a club website - just 55% compared to 90% of large clubs. The issue of limited resources - be it financing or volunteer time - is also visible when looking at the wider range of services offered. For example, far fewer small clubs are able to provide vehicle dating, archiving or library services to members. These types of service are primarily offered by larger clubs.

LARGE CLUBS ARE ABLE TO OFFER MORE TO MEMBERS

Q. Please tell us which of the following your club offers members?

Club size and services offered



YOUNG MEMBERS & SOCIAL MEDIA



APPEALING TO YOUNGER MEMBERS?

Survey results also reveal that 2 in 10 clubs actively provide special arrangements for younger members (21%), compared to the 8 in 10 that don't (79%).



21%

79%

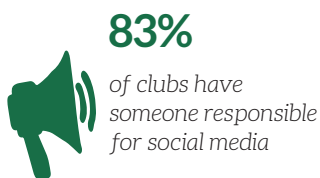
The larger the club, the more likely they are to cater for young members (e.g. 28% of large clubs do so).

Around 2 in 10 clubs have special arrangements for younger members

THE EMERGING ROLE & IMPORTANCE OF SOCIAL MEDIA

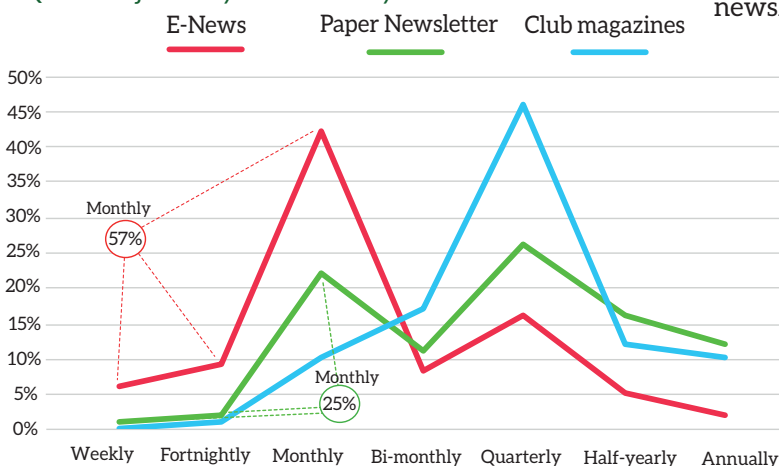
Many clubs in Europe have built a digital strategy for communicating with members. As many as 6 in 10 (60%) now operate a social media service - most commonly Facebook (96%), but also Whatapp (26%), Instagram (18%) and YouTube (12%).

Many clubs have dedicated people managing their social media with more than 8 in 10 (83%) appointing a social media 'person' who is responsible for content, and 4 in 10 are able to offer member-only content on social media channels. It also appears that future optimism and social media use go hand-in-hand with 68% of clubs that expect to grow also using using social media sites, compared to far lower use (54%) amongst clubs that expect to shrink in the next 5 years.



COMMUNICATING WITH MEMBERS

Q. How often do you send ... to your members?



Engaging members is a major challenge for clubs. It seems many more clubs now use a digital approach to club communications (59% e-news), than more tradition paper newsletters (20%)

HOW IS DIGITAL IMPACTING?

Nearly three times as many clubs (59%) now use e-news compared to paper-based newsletters (20%) to keep in touch with their members. Most of these clubs make email collection compulsory when joining (68%).

The benefit of using digital communication is lower cost and more frequent engagement with members - factors that could be key to both members and clubs.

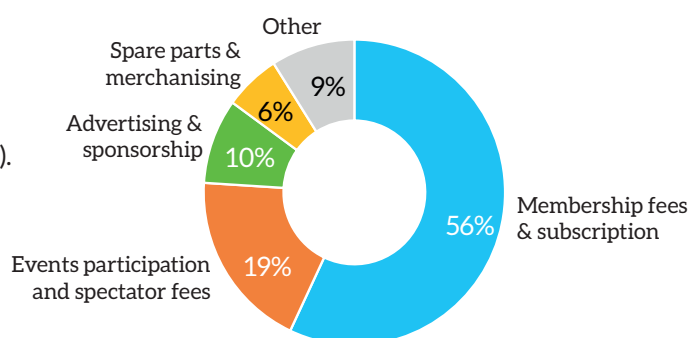
Survey results tell us that nearly 6 in 10 clubs (57%) that use e-newsletters do so on at least a monthly basis, compared to 25% of clubs that use paper-based newsletters.

HOW DO CLUBS GENERATE INCOME?

The average annual income of a historic vehicle club in Europe is approximately 31K €, although more than half (53%) operate on an income of >7.5 K€ per annum.

Membership fees account for the majority (56%) of club income and is even more important for large clubs (66%). Small clubs are more reliant of event fundraising (22%) than large clubs (11%).

Q. Please estimate the proportion of your turnover derived from the following?



SUPPORTING CHARITY

The average amount clubs raise for charity each year is 585 €.

585€

WORLDWIDE CLUB HEADLINES



This Club Fact File contains **results and themes from 1 735** surveys from those responsible for operating historic vehicle clubs in Europe. We are able to provide an overview of clubs, what concerns them the most, what services and activities they provide and how they generate their income to continue to help keep yesterday's vehicles on today's roads.



REGULATIONS

78%

The proportion of historic clubs that are concerned about regulations affecting historic vehicle use



PUBLIC PERCEPTION

51%

The proportion of historic clubs are concerned about public perception towards environmental concerns

MEMBERSHIP COST



36 € pa

The average annual subscription to a historic vehicle club. This provides access to a wealth of activities and services



55yrs

The average age of a member.

43% of historic vehicle clubs say the average age of members is increasing

BEING SOCIAL



66%

The proportion of clubs that organise informal social meets for members

GETTING OUT AND ABOUT

69%

The proportion of clubs that organise road runs



60%

SOCIAL MEDIA

The proportion of historic vehicle clubs that operate on social media (most commonly Facebook 96%)



31K €
PER ANNUM

The average annual club turnover per annum.

53% operate on <7.5 K€ turnover per annum

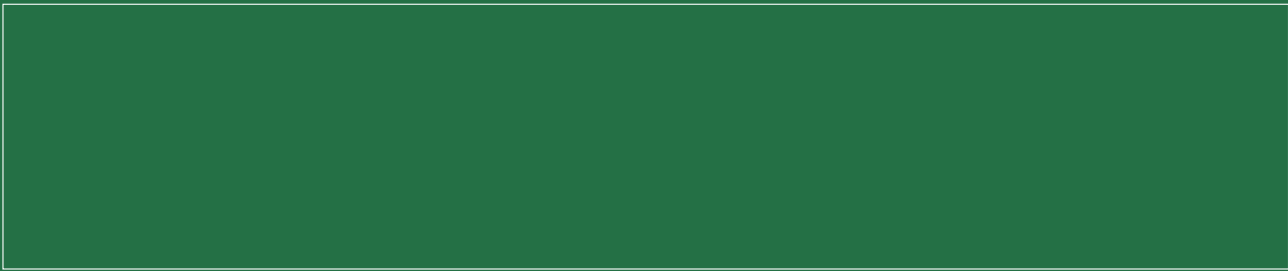
CLUB INCOME



56%

MEMBERSHIP SUBS

The average historic vehicle club relies on club subscription for 56% of its annual income.



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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.



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).

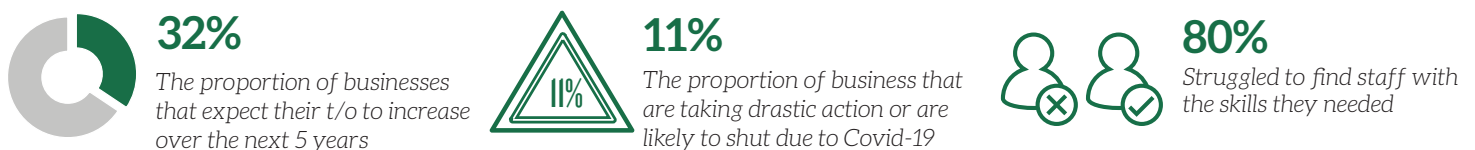
COVID-19 HAS SERIOUSLY IMPACTED

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.

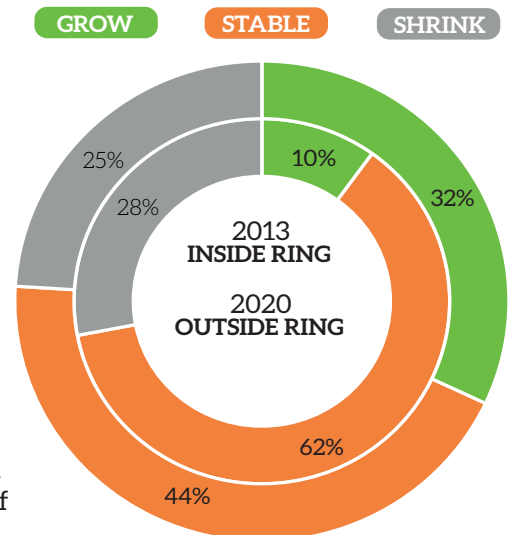
It is more encouraging to report that fewer businesses are having to take drastic action to survive (9%), and fewer still say they will likely shut as a result of the pandemic (1%). These results illustrate a resilience in the sector that will allow a bounce back in the near future.

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.



Business Turnover (the next 5 years)
Q. I expect the financial turnover attributable to historic vehicles to...?

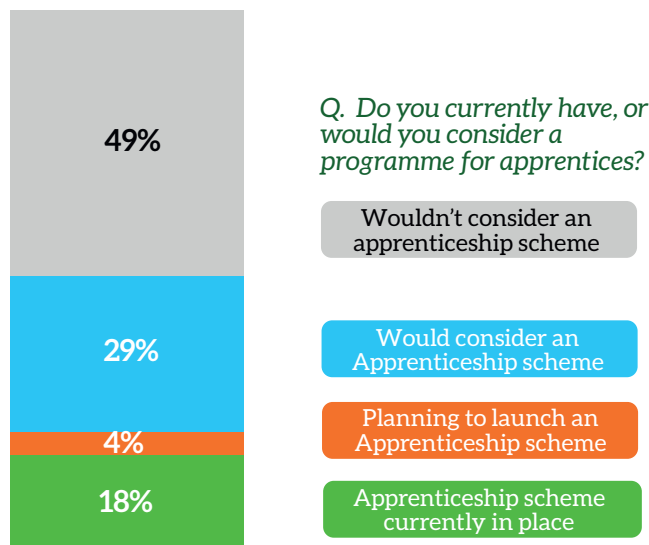


Note: the results presented are based on a combined sample of completed surveys across participating countries. Surveys were completed on a self-selecting basis and survey promotion was conducted separately within each country. Results for the UK have been merged from a separate survey questionnaire 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

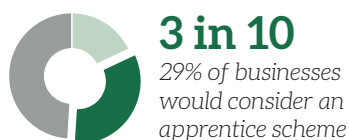
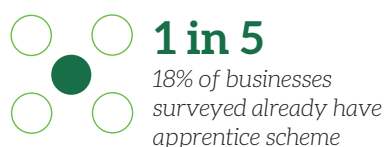
Providing training that is designed to protect skills is a challenge in any sector where small businesses are the norm, but with more than 1 in 2 (51%) saying they would either consider (29%), are planning (4%), or already provide (18%) an apprentice programme reveals a positive attitude towards skills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

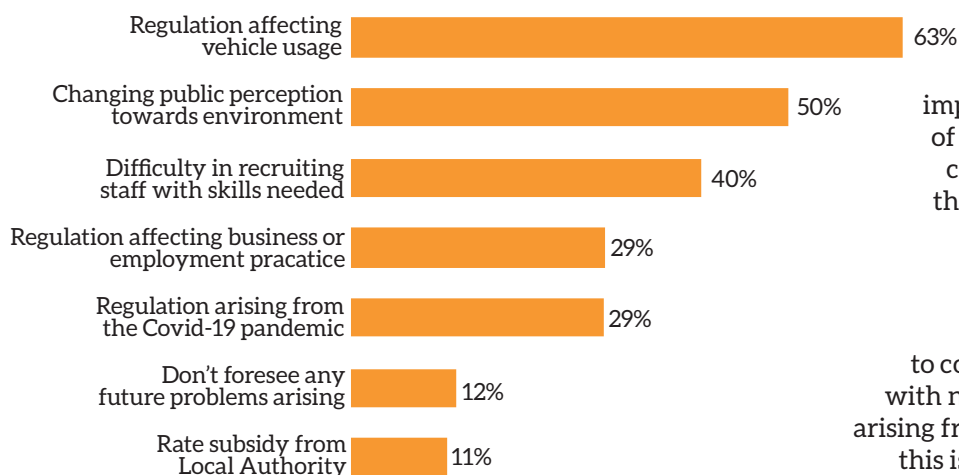
It also seems likely that demand for apprentices from businesses in the sector will stay strong with 9 in 10 (93%) of those with apprentices currently saying they will need more, or at least the same number of apprentices in each of the next 5 years.



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 of 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.



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

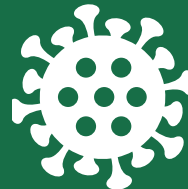
The average age of an employee working in the sector



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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