FEDERATION INTERNATIONALE FIVA VEHICULES ANCIENS

THE FIVA 2020/21 SOCIO-ECONOMIC HISTORIC VEHICLE SURVEY

2020/21

FACT FILE

HISTORIC VEHICLE OWNERS

Keeping yesterday's vehicles on today's roads

WORLDWIDE

HEADLINES RESULTS

HISTORIC VEHICLE OWNERS

HISTORIC VEHICLE FLEET

JDA RESEARCH

PROTECT, PRESERVE & PROMOTE

Keeping Yesterday's Vehicles on Today's Roads

Welcome to the Worldwide 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 from a combined Worldwide and is based on 54,948 surveys with owners and enthusiasts, and 127,855 evaluations of the historic vehicles they own.

AIM OF THIS FACT FILE

The aim of this Fact File is to provide FIVA with a usable overview of survey findings based upon Worldwide owners of historic vehicles. This has been presented across across 3 key sections; Headline Results, Owners and Fleet.

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.

Front cover picture credit: Laurent Heriou

HEADLINE RESULTS: WORLDWIDE

This Fact File provides the key headline results from the 2020/21 FIVA Socio-Economic Historic Vehicle Survey. It is based on 54,948 surveys with owners and enthusiasts from around the world (see spread of key participating countries below), who have provided 127 855 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 **3.800 €** per annum on the maintenance and running of their vehicle(s), **702 €** on attending historic vehicle events (entry, accommodation, food etc), and a further **356 €** on other items related to their wider interest in historic vehicles e.g. club membership, magazines etc. This adds to a total expenditure of **4.858 €** per owner, per annum.

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)

DIRECT SPENDING
on historic vehicles

3.800 €

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

TOTAL INTEREST SPENDING
on historic vehicles

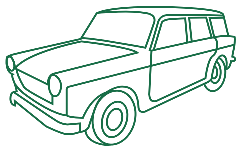
4.858 €

Total owner expenditure per annum on their interest in historic vehicles

Total Interest 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 1 413 km per annum and historic motorcycles travel 877 km per annum. The average distance that historic vehicle owners say they travel in their historic vehicles is 2 566 km per annum.



Vehicle distances based on registered vehicles only.

CARS

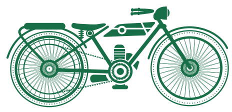
1 413 KM

per car, per annum

MOTORCYCLES

877 KM

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 (79%) attend historic vehicle events each year (spending around 888 € per annum). This includes more than half (53%) that stay overnight - on average a total of of 4.1 nights per annum.

MUSEUMS

40% OF HISTORIC VEHICLE OWNERS VISIT MUSEUMS

63 € per annum

HISTORIC VEHICLE EVENTS

888 € Annual spending from event attenders

4.1 NIGHTS Total nights per annum

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 3.1 historic vehicles across the world). 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: Argentina, Australia, Austria, Belgium, Brasil, Canada, Chile, Czech Rep, Denmark, Finland, France, Germany, Greece, India, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom. Many other countries participated in the survey and are included in this report, but samples are too small to report on. Note to reader: The reader should review the findings with some caution as country samples have been combined and may not be proportional to the number of owners or historic vehicles in each participating country. There was also no control on participation meaning that vehicle type and make may not be reflective of true profiles within each country.

DIRECT SPENDING

ON HISTORIC VEHICLES

3.800 €

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

ECONOMY

4.858 €

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 **1 413 km**

MOTORCYCLES **877 km**

BUYING HISTORIC VEHICLES

AVERAGE VALUE OF VEHICLES PURCHASED (2019)

21.3K € CARS

58% of car purchases are less than 10K €

5.2K € MOTORCYCLES

57% 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

79%

OF OWNERS ATTEND HISTORIC VEHICLE EVENTS

AVERAGE OF 6 .1 EVENTS PER ANNUM

OVERNIGHT STAYS

53% OF EVENT ATTENDERS STAY OVERNIGHT AT HISTORIC VEHICLE EVENTS

4.1 NIGHTS

PER ANNUM

HISTORIC VEHICLE OWNERS: WORLDWIDE

The FIVA 2020/21 Socio-Economic Historic Vehicle survey collected 54,948 surveys from owners and enthusiasts of historic vehicles from around the world. We have used that base to provide an overview on historic vehicle owners. Results for car owners are based on a 44,026 surveys, and for motorcycle owners are based on 10,034 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 (55%) are working, most in full time (37%), or self-employed roles (14%), 42% are retired and 3% other. The average household income of a historic vehicle owner is 57.6K € per annum - around half (47%) have an annual household income of 40K € or less. Around 1 in 3 (35%) owners live in an urban city setting compared to 40% that live in a rural location. Around 1 in 4 (24%) live in a town.

OWNER AGE

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

42% 55%

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

57.6K € per annum

Average household income (47% less than 40K €)
Car 59.4K €
Motorcycle 51.3K€

35% of historic vehicle owners live in a urban city setting
Car 36% city vs 40% rural
Motorcycle 32% city vs 42% 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.

81%

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

79%
Car 80%
Motorcycle 77%

Nearly 8 in 10 owners attend historic vehicle events (on average 6.1 events each year)

888 €

The average amount owners spend at events per annum
Car 942 € / Motorcycle 641 €

3%

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

Nearly 8 in 10 (79%) owners attend events, on average 6.1 events each year (6.2 for car owners | 5.9 for motorcycle owners). Owners travel an average of 327 km to be at their favourite event (336 km for car owners | 294 km for motorcycle owners).

Owners say that National (26%) and Club events (25%) are the most enjoyable to attend (car owners 27% and 25%) and motorcycle owners 26% and 23% respectively). More than half (53%) stay overnight at events (on average 4.1 nights per annum). Of these, most stay in hotels (66%), camping/caravanning accommodation (18%) or Bed & Breakfast (14%), with fewer staying with friends (7%), or in a motorhome/camper van (5%).

SOCIAL MEDIA USE

Facebook is the most frequently used social media platform (61% car owners | 62% motorcycle owners) with nearly half of historic vehicle owners (46%) using it on a daily basis (45% car owners | 46% motorcycle owners). 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 1.6 youngtimer vehicles). These are mostly passenger cars (81%) and motorcycles (13%). The main marques for youngtimer cars are Mercedes-Benz (11%), BMW (8%), Jaguar (5%), Porsche (5%), VW (5%), Renault (4%), Peugeot (4%) and Volvo (4%). The main marques for youngtimer motorcycles are Honda (21%), Yamaha (14%), BMW (13%), Kawasaki (9%), Suzuki (8%), Triumph GB (6%), Ducati (6%) and and Harley Davidson (6%). The average age of these vehicles is 24 years i.e. manufactured in 1996 (cars 1996 | motorcycles 1995)

More than 8 in 10 (82%) youngtimer vehicles are licensed for road use and they are driven/ridden an average of 4 010 km per annum (cars 4 300 km per annum | motorcycles 2 019 km). The majority of youngtimer vehicles are described as being in original (74%) or authentic (12%) condition.

The FIVA definition of Historic vehicles is based on vehicles that fit the folllowing 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: some base sizes vary due to non-response.

OWNER AGE

OWNER AGE

59 YRS

AVERAGE AGE OF
A HISTORIC VEHICLE OWNER

60 YRS | 59 YRS

AVERAGE HH INCOME

57.6K €

AVERAGE HOUSEHOLD INCOME
HISTORIC VEHICLE OWNERS

59.4K € | 51.3K €

YOUNGTIMER OWNERSHIP

30%

ALSO OWN A YONGTIMER
VEHICLE (1.6 VEHICLES)

Mercedes-Benz, BMW, Jaguar, Porsche, VW

Honda, Yamaha, BMW, Kawasaki, Suzuki

SOCIAL MEDIA

62%

OF OWNERS ARE USING
FACEBOOK
46% At least once a day

76% use YouTube | 24% use Instagram |
17% use Pinterest | 12% use Twitter

HV CLUBS

CLUB

81%

OF OWNERS BELONG
TO AN HISTORIC
VEHICLE CLUB
93 € SUBSCRIPTION

83%
CAR OWNERS

79%
MOTORCYCLE OWNERS

79%

OF OWNERS ATTEND
HISTORIC VEHICLE EVENTS

888 € PER ANNUM ON EVENTS

Includes expenditure on ticket entry, accommodation
and food and drink whilst at the event
(per owner equivalent = 702 €).

TYPES OF EVENTS ATTENDED

National	26%
Club	25%
Regional	19%
International	15%
Local	13%

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 4%| Motorcycle owners 3%

TYPE OF ACCIDENT

48% small bump | 43% damage to panels |
5% major structural damage | 3% write off

HISTORIC VEHICLE FLEET: WORLDWIDE

The FIVA 2020/21 Socio-Economic Historic Vehicle Survey collected 127 855 detailed evaluations of the historic vehicle fleet from around the world (92 288 cars and 21 914 motorcycles). We have used this base of historic vehicles to provide an overview of the worldwide fleet.

THE HISTORIC VEHICLE FLEET

The survey indicates that 72% are cars, 17% 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, Mercedes-Benz, Triumph, VW, 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 slightly younger (53 years) than motorcycles (56 years).

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

Cars have an average age of 53

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

Motorcycles have an average age of 56

HISTORIC VEHICLE VALUES

The average value of an historic vehicle is 23.7K € with cars being considerably more valuable than motorcycles (29.2K € vs 6.7K €).

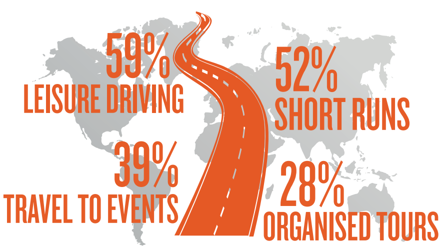
The value of the most common car marques include Citroen (14.9K €), MG (20.8K €),, Mercedes-Benz (44.5K €), Triumph (18.6K €), VW (14.7K €) and Jaguar (60.9K €). For motorcycles the value of the most common marques include Honda (4K €), BMW (7.2K €), BSA (5.9K €), Triumph (7.7K €) and Yamaha (3.7K €). Note: these are based on owner estimates and should be treated as indicative of real values.

HISTORIC VEHICLE CONDITION AND USE

8 in 10 (80%) historic vehicles are licensed for road use (cars 83% | motorcycles 74%). On average, historic vehicles travel 1 274 km each year, with cars travelling further than motorcycles (1 413 km compared to 877 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, 59% have been used for leisure driving (61% cars and 55% motorcycles), 52% have been used for short runs (52% cars and 55% motorcycles) and 39% for travel to events (43% cars and 26% motorcycles). In addition, a further 3 in 10 were used for organised tours (30% cars and 18% motorcycles). No historic vehicles are used on a daily basis for routine travel.

More than 8 in 10 (81%) historic vehicles are described as being in an original state compared to 19% that are modified. Around 3 in 10 historic vehicles (31%) are described as being in original condition, 34% restored, 7% rebuilt, 17% authentic and 11% in need of restoration. For cars - 30% original, 35% restored, 7% rebuilt, 17% authentic and 11% needing restoration. For motorcycles - 33% original, 9% rebuilt, 16% authentic, 32% 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 avearge historic vehicles are used 15 times a year

The FIVA definition of Historic vehicles is based on vehicles that fit the folllowing 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. Frequency of using and the reasons for using historic vehicles is based on all vehicles that have been used in some way in the last 12 monhts (to Dec 2019). Note: some base sizes vary due to non-response. The historic vehicles represented above reflect the vehicles owned by respondents (owners) completing the survey.

HISTORIC VEHICLE PROFILE

CARS **72%**

MOTORCYCLES **17%**

Based on survey vehicle sample

KEY MAKES OF VEHICLE

CARS	Based on survey vehicle sample	MOTORCYCLES	Based on survey vehicle sample
CITROEN	7%	HONDA	12%
MG	7%	BMW	8%
MERCEDES-BENZ	6%	BSA	7%
TRIUMPH	6%	TRIUMPH	6%
VW	5%	YAMAHA	6%
JAGUAR	4%	SUZUKI	4%
Ford (USA), Renault, Fiat, Alfa Romeo, Porsche	3% each	Norton, Kawasaki, Harley Davidson, Moto Guzzi, Vespa	3% each

AVERAGE DISTANCE TRAVELLED BY HISTORIC VEHICLES PER ANNUM

CARS **1 413 Km**

MOTORCYCLES **877 Km**

Based on all licensed historic vehicles in the survey

MANUFACTURED 1967

1967

AVERAGE YEAR OF MANUFACTURE

Cars: 1967 — Motorcycles: 1964

OWNERSHIP YEARS

14 YEARS

AVERAGE NUMBER OF YEARS A HISTORIC VEHICLE HAS BEEN OWNED

Cars: 14 YEARS — Motorcycles: 15 YEARS

AVERAGE HISTORIC VEHICLE VALUE

23.7K €

CAR 29.2K €

MOTORCYCLE 6.7K €

(Owner valuations)

80%

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

Cars: (16 times a year) — Motorcycles: (13 times a year)

11% NEED RESTORATION

PROPORTION OF HISTORIC VEHICLES THAT REQUIRE RESTORATION

Cars: (11%) — Motorcycles: (10%)

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FEDERATION INTERNATIONALE DES VEHICULES ANCIENS — FIVA

THE FIVA SOCIO-ECONOMIC HISTORIC VEHICLE 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?

AROUND THE WORLD

CLUB CONCERNS

CLUB SERVICES

CLUB ACTIVITIES

JDA RESEARCH

THE WORLDWIDE CLUB SCENE

The 2020/21 FIVA Survey provides a great deal of focus on the global historic vehicle movement. This report looks at historic vehicle clubs around the World today.. read on:

This Club Fact File contains summary **results and themes from 1 972** surveys with enthusiasts responsible for running historic vehicle clubs around the world today. It is based on a sample from a wide range of countries including France (428), UK (250), Germany (239), Belgium (224), Spain (224), Australia (160), Spain (106), Sweden (94), Denmark (74), Italy (54), Norway (44), Brazil (43), the Czech Republic (34), Luxembourg (25), Argentina (13) and others. We provide an overview of clubs, what problems they foresee, what services and activities they provide and how they generate their income to continue to help keep yesterday's vehicles on today's roads.

WHAT ARE THE POTENTIAL PROBLEMS CLUBS FACE?

Perhaps unsurprisingly, clubs tell us that the most concerning problems they foresee are the ability of club members to use their vehicles on roads without stringent regulation (76%), and also without negative public perception as a result of changing attitudes towards the environment (49%).

We also know that more than 4 in 10 clubs (43%) are struggling to find new board members to help support the continued running of their club. A further 1 in 4 (24%) are concerned about future fuel supply.

What clubs say they are concerned about the most...

VEHICLE USE

76% *Regulation affecting vehice usage*

43% *Finding new board members / volunteers*

49% *Changing public perception, environment considerations etc*

24% *Fuel problems*

THE NEXT 5 YEARS

Many clubs around the world (42%) are expecting their membership to **grow** over the next 5 years, or at least think that current numbers will remain unchanged (36%). However, around 1 in 5 expect their numbers to shrink (22%).

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

42% LARGER	36% UNCHANGED	22% SMALLER

All clubs (n=1 728)

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 56 years.**

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

43% OLDER	44% SIMILAR AVERAGE AGE	12% YOUNGER

All clubs (n=1 717)

CLUBS COME IN ALL SHAPES & SIZES

The average club has 380 members, although 1 in 3 (32%) can be defined as small (50 or fewer members), 55% as medium sized (51-499 members) and 13% as large (500 or more members). Around 3 in 10 clubs describe themselves as having a local focus (31%), 1 in 4 as regional (26%) and 28% a national focus. Around 1 in 10 clubs (11%) are international and 3% tell us they are a branch of a larger club.

The most common vehicle types catered for include passenger cars (86%), motorcycles (43%), vans (27%), mopeds (24%), ex-military vehicles (22%) and tractors (19%). More than half of clubs (51%) cater for vehicles of many makes, type and ages, compared to 24% that only cater for one-make and 12% that only cater for one-model.

The majority of club members own at least one historic vehicle (75%), 3 in 10 own at least one youngtimer vehicle (29%).

32% *1 in 3 clubs have 50 or fewer members*

75% *of members own an historic vehicle*

57% *of clubs have a local or regional focus*

36 € *Average annual cost of a club membership*

Note: The survey was conducted online with FIVA member Federations being responsible for promoting the survey to all clubs in their own country. Please note that club participation was not compulsory and the sample may therefore not reflect the accurate structure of clubs. Base sizes for different questions may vary due to non-response. Front pic credit: John Retter, Brooklands Motor Museum, UK.

WHAT DO HISTORIC VEHICLE CLUBS OFFER?

AN AFFORDABLE HOBBY

It is very affordable to become a member of a historic vehicle club with an average annual subscription of just 36 € per annum, or just 29 € for smaller clubs (those with fewer than 50 members), 38 € for medium sized clubs and 47 € for larger clubs (500+ members). Being a member of a historic vehicle club brings considerable value to the enthusiast and access to a wide range of vehicle-related activities.

A CLUB ENVIRONMENT TO ENJOY BEING PART OF!

As a club member you will 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, medium sized clubs 13 events, and small clubs organising an average of 7 events each year.

Activities provided by historic vehicle clubs

Activity	All clubs	Club size: Small 1-50	Club size: Medium 51-499	Club size: Large 500+
Informal social meets	68%	62%	71%	72%
Non-competitive road runs / tours	68%	61%	70%	73%
Displays (at events organised by others)	63%	55%	65%	73%
Formal social meets	59%	47%	64%	68%
Shows (organised by your club)	31%	20%	35%	44%
Non-competitive tours abroad	22%	16%	22%	34%
Autojumble	22%	16%	23%	32%
Static concours	15%	12%	15%	26%
Competitive road events	13%	13%	12%	18%
Off-road driving competitions	5%	3%	4%	10%
Off road speed events	4%	4%	4%	8%
International competitive events	2%	1%	2%	4%

Base: All historic vehicle clubs (n=1 970)

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 (68%), Displays (63%) and Shows (31%) 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 (68%)*** - 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***, ***5%*** 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.

ACCESS TO CLUB SERVICES

CLUBS PROVIDE VALUABLE SERVICES TO MEMBERS

In addition to the range of club activities, historic vehicle clubs also provide many valuable services to their members. 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 trying to keep historic vehicles on the road.

A SNAPSHOT OF SERVICES PROVIDED BY CLUBS IN GERMANY

- **75%** *offer club websites*
- **61%** *offer content on social media*
- **60%** *offer e-news-letters*
- **57%** *offer technical advice*
- **41%** *offer club merchandise*
- **29%** *produce a self-published magazine*
- **22%** *provide paper newsletters*
- **22%** *offer vehicle dating services*
- **21%** *offer archiving services*
- **20%** *offer library services*
- **17%** *offer spare parts sales service*
- **12%** *offer virtual meetings*
- **9%** *magazine published by a pro publisher*
- **8%** *offer spare parts manufacturing*

Base: All clubs (n=1 970)

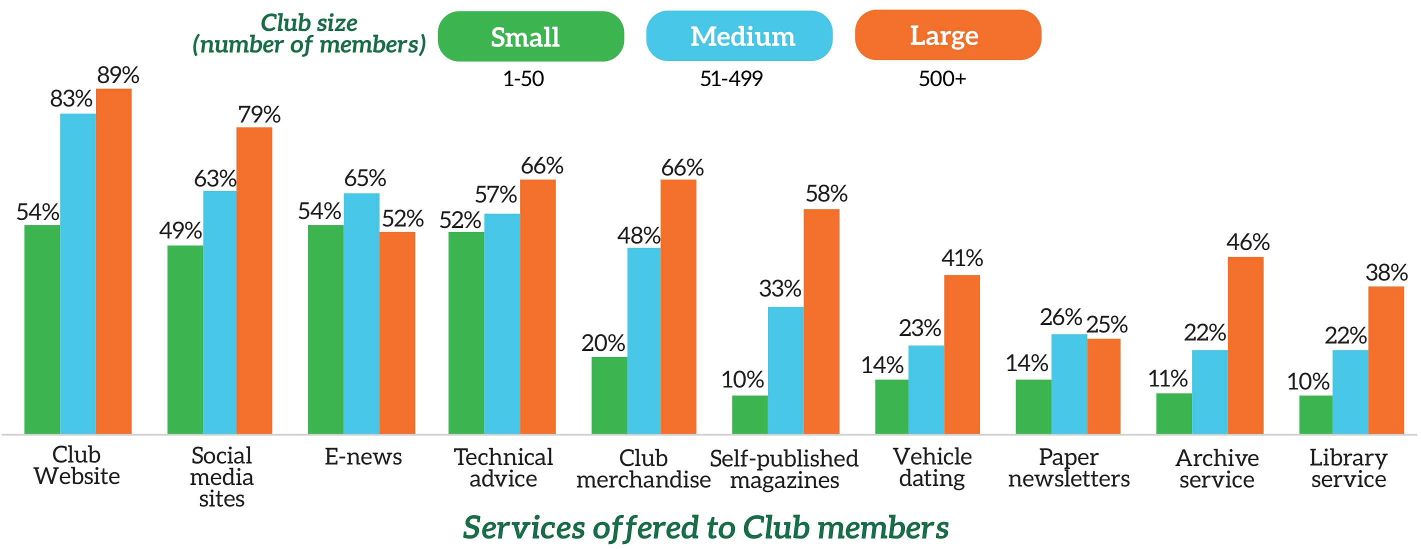
SO HOW DO CLUBS DIFFER?

There are clear differences in what clubs of different sizes offer their members. Large clubs, who are more likely to be national (48%) or international (22%) in focus and comprise clubs of many makes and types (38%) and also just one-make (34%). These clubs are far more likely to provide digital services like websites (89%) and social media (79%) than medium or small clubs. These services support their club-based activities and allow them to reach their membership base with speed and cost efficiency.

By comparison, small clubs (<50 members) are predominently local (47%) or regional (28%) in focus, and who primarily cater for many different makes, types and age of vehicle (58%) are less likely to offer a website or an active social media presence.

LARGE CLUBS ARE ABLE TO OFFER MORE TO MEMBERS

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



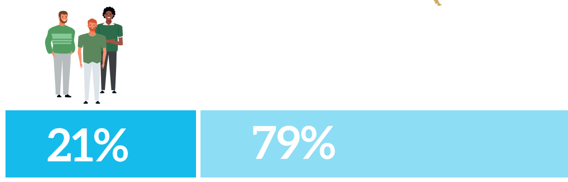
Base: small clubs (n=624) | medium (n=1082) | large (n=261)

ATTRACTING YOUNGER MEMBERS

APPEALING TO A NEW GENERATION

Survey results reveal that around 1 in 5 clubs actively provide special arrangements for younger members (21%), compared to the 4 in 5 that don't (79%).

Large clubs appear most active with 28% saying they have a youth group or make special arrangements for young people.



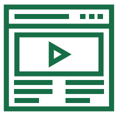
Around 1 in 4 clubs have special arrangements for younger members
Base: All clubs (n=1 970)

THE IMPORTANCE OF SOCIAL MEDIA

Many clubs around the world have been quick to build a digital strategy for communicating with members. Survey results indicate that more than 6 in 10 (61%) offer some form of social media content - most commonly Facebook (96%), Whatsapp (27%), Instagram (19%), YouTube (12%), and Twitter (9%).

Many clubs are further utilising social media with more than 8 in 10 appointing a social media 'person' to manage their social media, and nearly 4 in 10 offering member-only content via their social channels.

84%
of clubs have an appointed Social Media manager responsible for social content

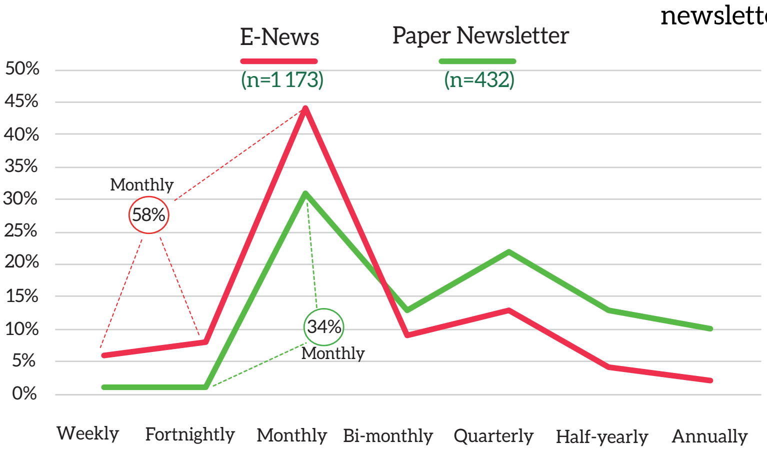


38%
of clubs provide social media offer restricted member-only content

48%
see social media as an extremely or very important way to communicate with members

COMMUNICATING WITH MEMBERS

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



Frequency of sending news

Engaging members can be a major challenge for clubs. It seems many now use a digital approach with nearly three times as many clubs (60%) using e-news compared to paper-based newsletters (22%) to keep in touch with members.

HOW IS DIGITAL IMPACTING?

The benefit of using digital e-news compared to paper newsletters includes cost and frequency - essentially speaking to members more often at lower cost.

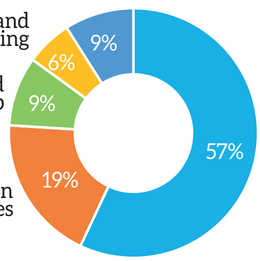
This is clear in the survey findings where 58% of clubs using e-news send out monthly newsletters compared to 34% of clubs using paper-based newsletters.

HOW DO CLUBS GENERATE INCOME?

The average annual income of a historic vehicle club is approximately 31K € per annum. More than 1 in 2 clubs (54%) operate on an income of < 7.5 K€ per annum.

Membership fees account for more than half (57%) of club income with event participation (19%) and advertising/ sponsorship (9%) also significantly contributing to turnover.

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



Base: All historic vehicle clubs (n=1 923)

SUPPORTING CHARITY

The average amount raised for charity each year by clubs is 630 €.

630 €
Annual charity donation

WORLDWIDE CLUB HEADLINES

This Club Fact File contains **results and themes from 1 972** surveys from those responsible for operating historic vehicle clubs around the world. 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.

VEHICLE USE

76%
REGULATIONS

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

49%
PUBLIC PERCEPTION

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

36 €
The average annual subscription to a historic vehicle club.

This provides access to a wealth of activities and services

56yrs
The average age of a club member.

43% of historic vehicle clubs say the average age of members is increasing compared to 12% that say it is getting younger

68%
The proportion of clubs that organise informal social meets for members

68%
The proportion of clubs that organise road runs

61%
The proportion of historic vehicle clubs that operate on social media (most commonly Facebook 96%)

31K €
The average annual club turnover per annum.

54% operate on <7.5 K€ turnover per annum

Annual Club income

Member fees

57%
The average historic vehicle club relies on club subscription for 57% of its annual income.

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.

905K €
Average turnover

28%
of businesses export their products / services

8.4
Average employees (56% have 1-2 employees)

EMPLOYEE AGE 43 YRS

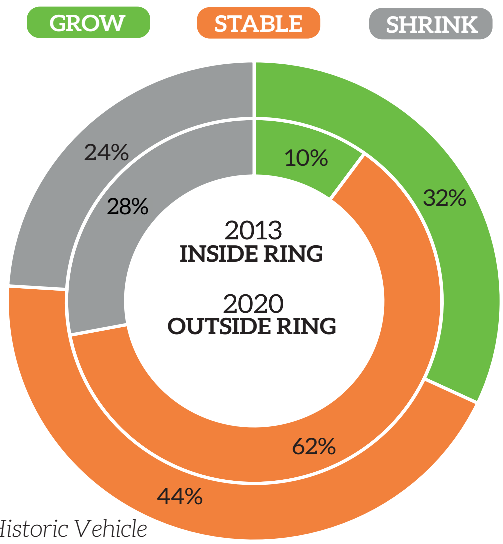
43yrs
Average age of employees

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.

Business Turnover (next 5 years)

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



Historic Vehicle Businesses (n=737)

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. Fortunatley, relatively few have issues with rates of pay (18%).

32%
The proportion of businesses that expect their t/o to increase over the next 5 years

11%

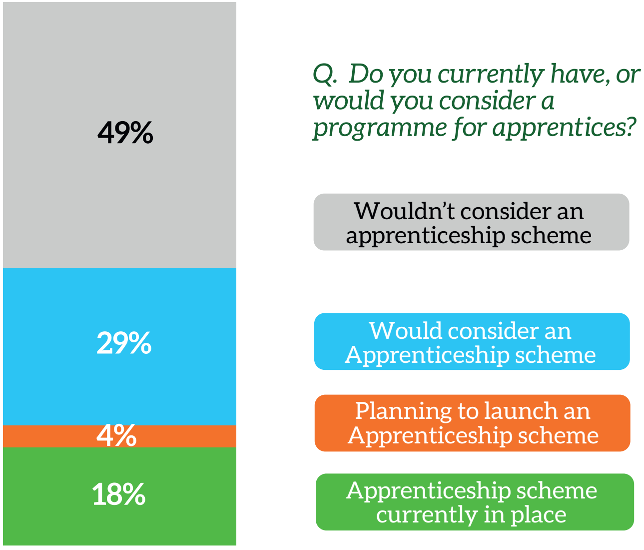
11%
The proportion of business that are taking drastic action or are likely to shut due to Covid-19

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 or hsitoric 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.

1 in 5 *businesses have apprentice programmes in place*

20yrs *the average age of an apprentice*

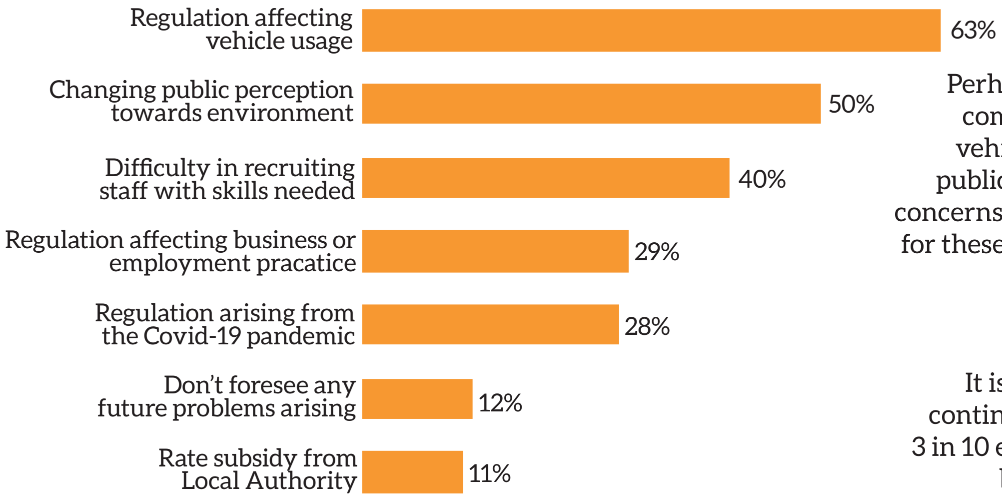
3 in 10 *businesses would consider running an apprentice programme*

9 in 10 *of those with a programme saythey will need more apprentices in the future*

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.

VEHICLE USE

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.

EMPLOYEE AGE
43 YRS

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.

COVID-19 IMPACT
2021

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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