



THE HISTORIC VEHICLE MOVEMENT IN EUROPE

MAINTAINING OUR MOBILE TRANSPORT HERITAGE

RESEARCH REPORT





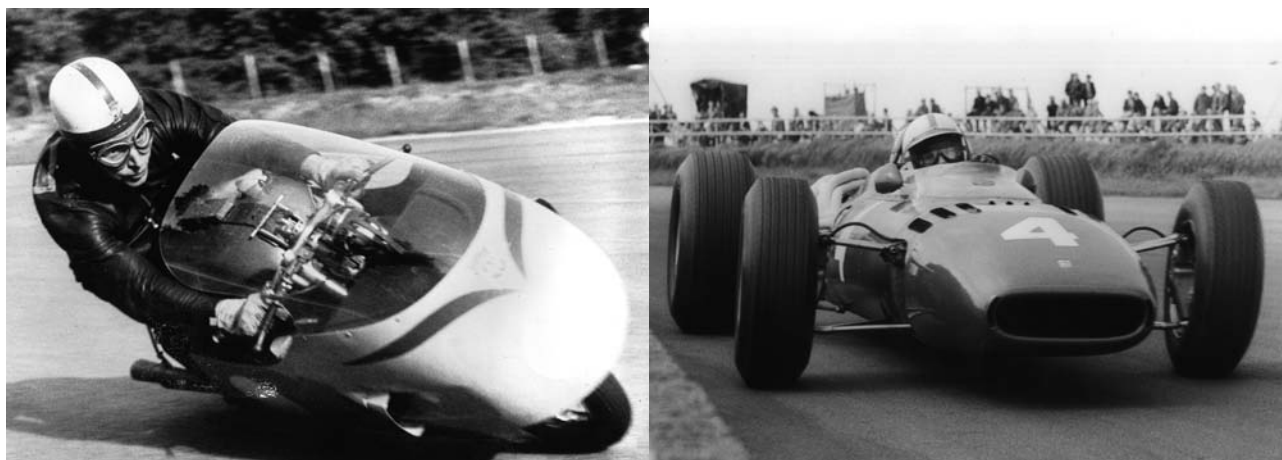
FOREWORD

JOHN SURTEES MBE

In 1960 I made the transition from two to four wheels after having won seven world championships. In recent years I have stepped back in years to ride and drive some of the very same machines that I raced in historic events all over the world. Not only on race tracks but through villages and cities where the enthusiasm of the young and the not so young has said it all.

Europe has been the centre for the development of cars, motorcycles and of motor sport for over a hundred years. It is part of our heritage and one which in recent years has seen an enormous growth in the support of historic events. Major manufacturers have created support programs for the historic cars and motorcycles they produce and an industry has developed to ensure the enthusiastic owners have the parts and the know-how to keep their cherished vehicles running. And it is not just the not so young or the wealthy who are involved. The age groups and the values cover a wide spectrum.

It covers machines from the most basic to the most exotic, each of them a piece of our history. It is the sight and sound of these machines, coupled with their history and in some cases my personal memories and most importantly the enthusiasm I see they generate that has encouraged me to become more involved in the movement. This is why I fully support this type of research which will help preserve and promote this important part of our International Motoring heritage.



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EXECUTIVE SUMMARY

This Research

The Fédération Internationale des Véhicules Anciens (FIVA) in association with its National Federations and their clubs, with the assistance of industry and other institutions has undertaken this Europe wide survey of the historic vehicle movement and its activities to cover the twelve-month period from 1st July 2004 to 30th June 2005.

The historic vehicle movement is a considerable contributor to the European economy and is responsible for thousands of jobs in a range of traditional skills inside stable businesses. It attracts interest from millions of people from all walks of life who enjoy seeing our mobile motoring heritage of cars, motorcycles, steam and commercial vehicles of all types over 25 years of age.

This is the first such Europe wide study undertaken. It is a quantitative study of the scope and range of individual, trade and club based activities that maintain the communities of interest (social, technological, economic) in road transport heritage. It provides considerable data to promote and protect the activity. This is only a beginning, however, and cannot be considered definitive or complete. It serves to indicate many avenues for further research.

Methodology

The research was based on a questionnaire survey conducted between 2005—2006. 11 European Union countries (Cyprus, Czech Republic, Denmark, France, Germany, Hungary, Holland, Ireland, Italy, Sweden and United Kingdom) were directly involved.

In each of the participating countries there were three separate paper questionnaires: one for individual enthusiast members of historic vehicle clubs to complete: one for specialist traders providing services to the historic vehicle movement and a third for the clubs themselves. Websites set up for club members in Denmark, Sweden, Holland and France provided the option of completing questionnaires via the internet.

The responses are restricted to those of club members and traders who are dependent on the community. In principle it does not contain information from non-club members. Consequently, the figures reported could be further amplified to include all enthusiasts and businesses.

In analysing the data the research team extended the results from the 11 countries surveyed to represent the 23 members of FIVA in Europe.

- 750,000 questionnaires were distributed across Europe principally to vehicle club members.
- Questionnaires were produced in 9 languages, using 5 currencies.
- Over 9,000 questionnaires were distributed to organizations providing goods and services to the European historic vehicle community.
- The combined FIVA club membership in participating countries is 670,000.
- The remaining 12 countries have a FIVA membership of 116,000.

Key Findings

1. Economic Activity

- Historic vehicle related activity is worth over **€16 billion** to the EU annually.
- Export trade is worth over **€3 billion**.

2. Employment and Stability

- Over **55,000** people in the EU earn some or all of their living serving the historic vehicle movement.
- **67%** of businesses serving the movement have been established for over 10 years.

3. Number and Use of Vehicles

- Over **70%** of historic vehicles travel less than **1500 kilometres** per year.
- There are approximately **1.5 million** historic vehicles that are road worthy and legal.

4. Cultural and Social Activities

- **29%** of historic vehicle owners have a household income of less than **€30,000** per year.
- In pursuit of their hobby enthusiasts spend **2.6 million** nights away from home both within and outside their home country.
- **78%** of historic vehicles are valued at less than **€15,000**.
- There are in excess of **786,000** enthusiasts who belong to nearly **2000** clubs.

INTRODUCTION

Our Mobile Transport Heritage

It is difficult to think of anything that has had a greater influence on the development of European society over the last century than mechanised road transport. A little over 100 years ago motorised road transport was virtually unknown, and the motor trade little more than an esoteric cottage industry. Today, everyone takes the freedom of travel afforded by the motor vehicle for granted and millions have been employed in some aspect of the motorised road transport industry.

The "historic vehicle movement" is a loose term encompassing interest in any type of road vehicle dating from the earliest days of mechanised transport 125 or more years ago right up to the late 1970s. The movement celebrates the past by preserving the small percentage of vehicles that have survived for more than 25 years. The movement is not just about cars and motorcycles but covers a huge range of vehicles from lightweight mopeds to giant haulage tractors; from steam traction engines to svelte sports cars; from one-rider motorcycles to 80 passenger buses – if it ran on the road, and was made before 1980, there is a place for it in the historic vehicle movement.



The historic vehicle movement relies on the dedication and enthusiasm of individuals who own and preserve the vehicles. They provide an invaluable service for future generations. Without them, few older vehicles would survive beyond their normal economic life. Posterity will be the poorer, and future generations will be deprived of tangible examples of the machinery that underpinned so many developments of the last century.

The one thing above all others that provides enthusiasts with the incentive to preserve their old vehicles is the knowledge that they may use them. Without that key ingredient our mobile transport heritage would cease to be mobile and fall into disrepair before its ultimate disintegration. This should not be permitted to happen to any part of our heritage, let alone one that has played such a major part in shaping our world.

FIVA

The Fédération Internationale des Véhicules Anciens (FIVA) is an international body representing historic vehicle owners worldwide with more than 50 member nations. Over half of these are concentrated in Europe. FIVA undertakes a special task on behalf of its European membership to ensure that measures taken in the interest of society at large do not impinge unfairly on the ability to use historic vehicles. FIVA does this by maintaining close links with European institutions to highlight potential problems and encourage regulatory solutions that satisfy both the need for freedom of use and the demands of daily traffic circulation. FIVA is a signatory to the EU Road Safety Charter and encourages its European national federations to establish and maintain similar links with their own national governments.

By working in conjunction with the EU, FIVA's

work has resulted in some clear recognition for the historic vehicle movement, and not always in respect of road usage. Recent examples include:

- Acknowledgement by the European Commission that historic vehicles need to be exempted from any future laws requiring the general use of daytime running lights as continuous use of lights would be impossible for many historic vehicles.
- A derogation in the Directive imposing a general ban on paints high in Volatile Organic Compounds to allow the continued sale of small volumes of correct paints to ensure visual authenticity of vehicles even after repair and re-spraying.
- Recognition by the European Commission that enforced retrofitting of blind-spot mirrors to historic buses and trucks would impair the authenticity of preserved historic commercial vehicles.

Across Europe there are hundreds of thousands of individual enthusiasts who benefit from FIVA's

work, thousands of people working in businesses that depend upon historic vehicles remaining in use, and millions of members of the general public would be the poorer if they were deprived of the pleasure of seeing historic vehicles being driven on the road or at events and shows.

The motor vehicle has become an integral part of European culture. We have a responsibility to protect all aspects of our heritage, and in this case that means ensuring the future of the historic vehicle movement by preserving the right to use old vehicles on the roads of Europe.

This report sets out the results of the first ever pan-European study of the historic vehicle movement. Its focus is firmly on the social and economic impact of those vehicles on the cultural, social and economic fabric of the European Union. The findings themselves are grouped under four headings: economic activity, employment and stability, number and use of vehicles and cultural and social activities. These are followed by a selection of observations by the researchers.

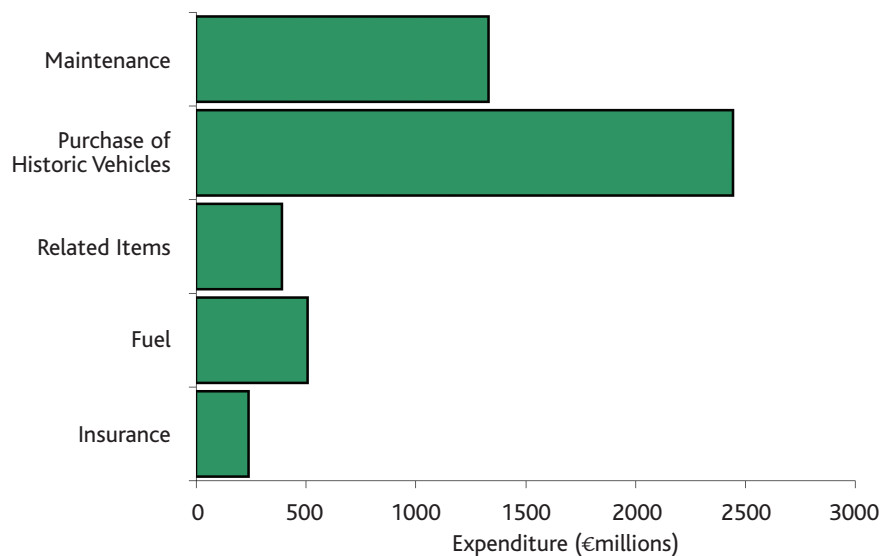


RESEARCH FINDINGS

1. ECONOMIC ACTIVITY

Historic vehicle trade in the EU is worth over €16 billion annually

- More than **9000** businesses generate their income by the provision of services and products to the historic vehicle movement.
- Businesses serving the historic vehicle movement generated **€16.66** billion in trade.
- Exports from the EU are worth **€3.35 billion**.
- **57%** of businesses export within Europe and **45%** export outside the EU.
- Over **€4.9 billion** was spent by club members on insurance, purchase of vehicles, fuel, maintenance, and other related items (magazines, books, models, clothes, etc.).
- Private sales of historic vehicles by members is approaching **€760 million**.
- Historic vehicle clubs spent over **€12.4 million** on the printing and distribution of club publications.
- Overall expenditure by historic vehicle clubs was approximately **€39 million**.

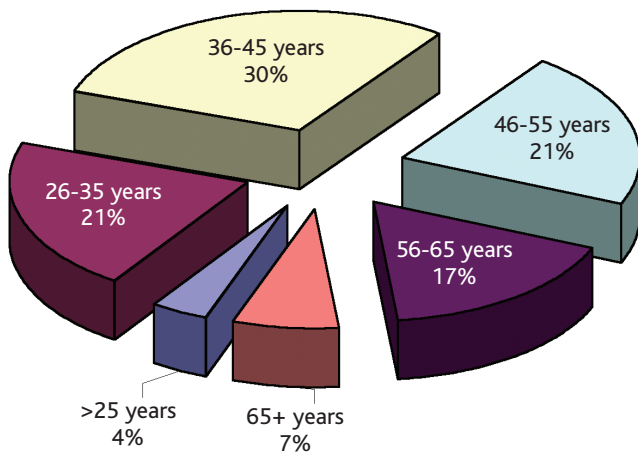


Expenditure by Members of Historic Vehicle Clubs

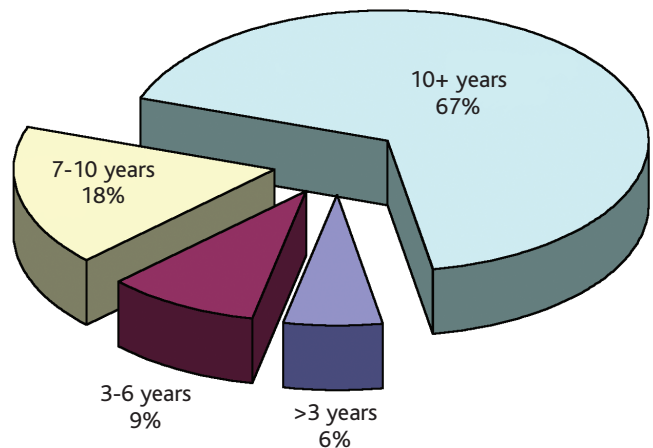
2. EMPLOYMENT AND STABILITY

Over 55,000 people in the EU earn some or all their living serving the historic vehicle movement

- 67% of businesses have been trading for more than 10 years.
- Of the 55,000 people employed in the historic vehicle trade, 68%, work full time.
- 55% of respondents working in the trade are aged 45 years or less, with 24% above 55 years.
- Of the over 9000 businesses involved in the movement 43% have plans to recruit staff within the next 3 years.
- 44% of businesses trying to recruit new staff indicated they have difficulty in finding people with the right skills and knowledge.
- 22% of businesses indicate they offer apprenticeships and 49% offer training.
- 73% of businesses have a website.



Age Range of People employed in the Historic Vehicle Trade

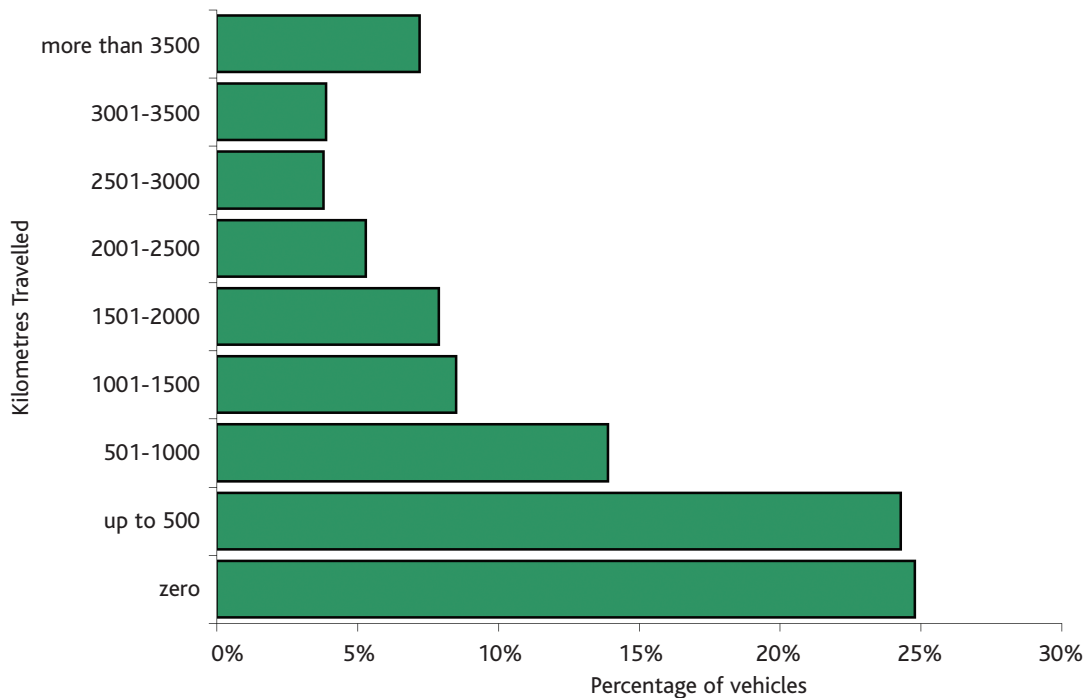


Length of Time in Business

3. NUMBER AND USE OF VEHICLES

Most historic vehicles in the EU travel less than 1500 kilometres per year

- **83%** of historic vehicles are used less than three times per week.
- **71%** of all historic vehicles travelled no more than **1500** kilometres in the year of the survey.
- There are **1,950,000** historic vehicles owned by club members resident in the EU.
- **1,530,000** historic vehicles are road worthy and legal.
- More than **255 million** vehicles are registered in the EU (EU Transport Commission data). Historic vehicles account for **0.8%** of these.
- Modern vehicles travelled a total of **2.2 trillion** kilometres. Historic vehicles travelled over **1.4 billion** kilometres (**0.07%** of the distance travelled by modern vehicles).

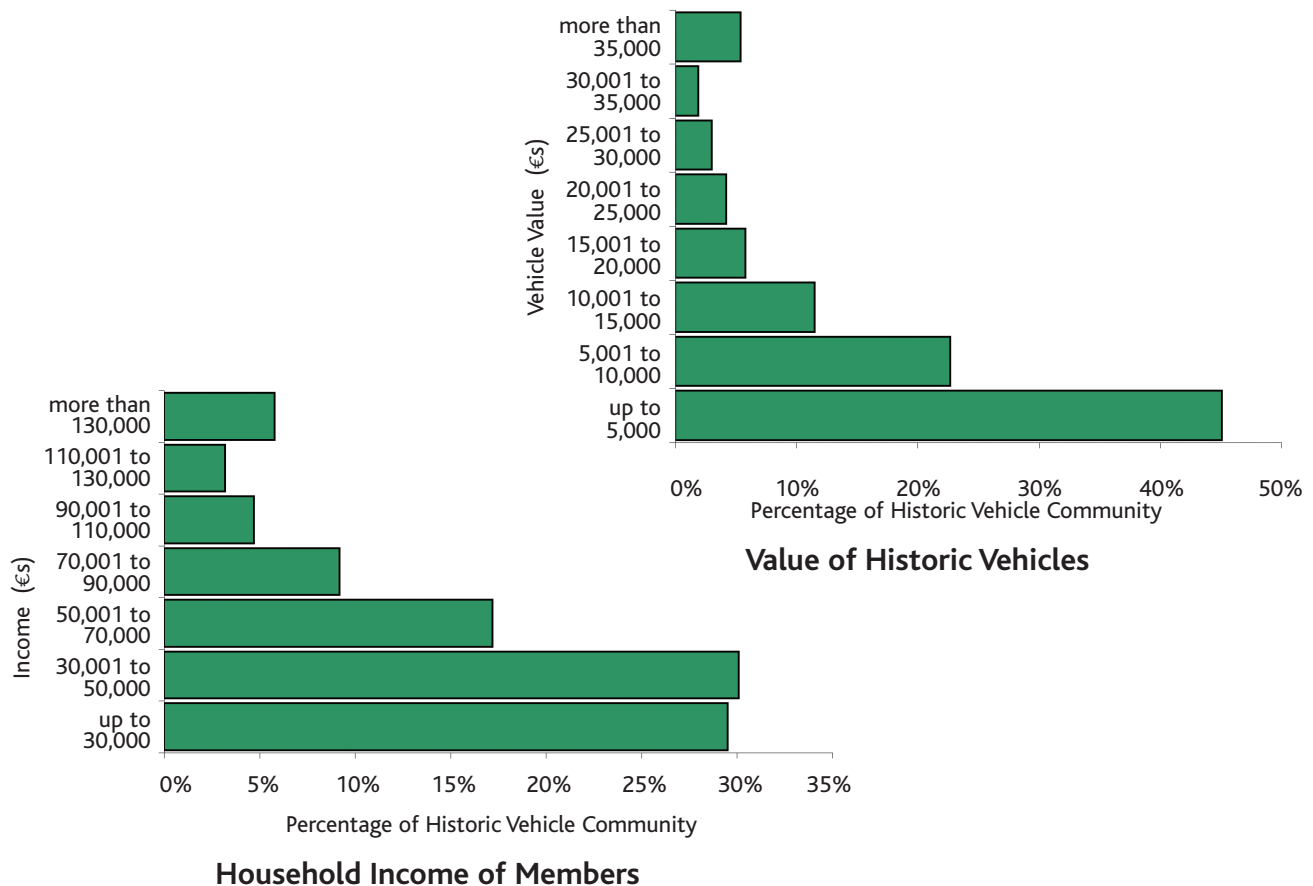


Distance Travelled by Historic Vehicles

4. CULTURAL AND SOCIAL ACTIVITIES

Almost a third of historic vehicle owners have household incomes of less than €30,000

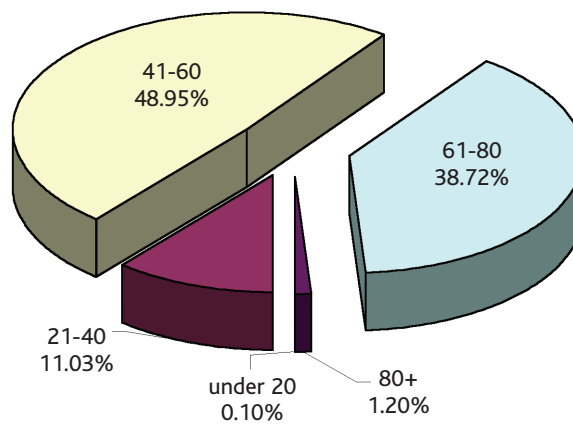
- Approximately **78%** of historic vehicles are valued at less than **€15,000**.
- **29%** of vehicle owners have a household income of no more than **€30,000** per year.
- There are over **786,000** enthusiasts belonging to nearly **2000** historic vehicle clubs.
- **165,000** EU club members were also members of historic vehicle clubs based outside their own countries.
- Enthusiasts spend **2,680,000** nights away from home to attend historic vehicle activities in the EU and abroad.
- Members attended over **265,000** historic vehicle events (with or without their vehicle) outside their own country.



4. CULTURAL AND SOCIAL ACTIVITIES

continued ...

- 49% of enthusiasts are aged between 41 and 60 years of age and 97% are male.
- Over 400,000 historic vehicles are being stored or worked on by enthusiasts.
- More than 80% of clubs have a website.
- Nearly all clubs have a newsletter and/or club magazine, spending over €12.4 million in the year on printing and distribution of their publications.
- There are over 700 transport museums in the EU, attracting over 75 million visitors annually.
- Magazines dedicated to historic vehicles have an annual circulation of over 20 million.
- EU clubs raised in excess of €1.8 million for charities.



Age Ranges of Club Members



OBSERVATIONS ON THE FINDINGS

This is the first pan-European survey of the historic vehicle movement and it has demonstrated that there is a very considerable level of cultural, social and economic activity associated with old vehicles in the EU. 670,000 individuals who are members of historic vehicle clubs in Europe had the opportunity to participate in this first survey, making it truly representative of the community. This part of the report offers a selection of observations to emphasise and clarify the data whilst suggesting where there is need for further research.

Economic Activity, Employment and Stability

Of the three surveys undertaken, the survey of businesses that provide services and goods to the historic vehicle movement gives valuable insight into the scale of the economic value the community has within the EU. We know there are many more businesses that supply the movement but their primary focus is elsewhere, usually with modern vehicles. These have not been surveyed because they are difficult to identify, as they do not advertise in publications targeted at historic vehicle enthusiasts. These businesses include, for example, manufacturers of parts, body repair services, suppliers and fitting services along with distribution, packaging and storage, the supply of exhausts, tyres and testing. Another small, but important, group of businesses has not been included in the survey, again because they do not advertise - these are the dedicated specialist businesses (often just one or two people) who have exceptional skills and

who derive their business purely from word of mouth personal recommendation.

It is more than noteworthy that the figure of **€16.6 billion** in trade was generated principally by businesses advertising to the historic vehicle market. This amount does not include the historic vehicle related trading undertaken by companies whose main activity is in other fields or which have no need to advertise. The amount is thus a very conservative estimate of the overall value of the historic vehicle movement to the economy of the EU. Closer relationships between the historic vehicle movement and the businesses that serve it would help to ensure that any future survey was more representative.

Club members themselves spent over **2.6 million** nights away from home attending historic vehicle related events. Their attendance at over 265,000 events outside their own country indicates the hidden contribution made by clubs and their members to the travel, hospitality and event industries both in the EU and outside. Many of the events 'abroad' were within the regions of European Union. The community surrounding historic vehicles is not only contributing to the preservation of our national heritage but to the



steady generation of a harmonised European Community due to the substantial level of cross-border communication. The cultural and social fabric of Europe is strengthened by the extent of inter-regional travel that is undertaken by those involved with historic vehicles.

There are over **55,000** people employed in historic vehicle based businesses and the evidence is that these are significant employment opportunities. However, the dynamics of these businesses and the employment they provide are not fully understood. It is notable that most businesses have been trading for more than **10 years**, indicating a considerable maturity and longevity of the market. Indeed, it is not difficult to identify businesses that have been in existence for 30 years and over. **43%** of businesses were clear in their intention to recruit staff over the coming years. However, we should be aware that **44%** of businesses reported having difficulties recruiting staff with the necessary skills and knowledge. A further investigation of these skills shortages is needed.

Historic vehicle clubs contribute substantial amounts to the economy of the EU. A high proportion of the **€12.4 million** is generated for businesses in the mainstream economy, such as

printers and postal services. Additionally, clubs provide business for insurance companies and often direct their members to such companies for the insurance of their vehicles. They are also responsible for initiating the re-manufacture of parts, and organising events including tours at home and abroad.

The Number and Use of Historic Vehicles

It is remarkable and wonderful that so many vehicles have survived into preservation. That said, in overall numbers they account for a very small proportion of all vehicles on the roads of the EU. There are over 255 million vehicles in the EU of which only **0.8%** are historic. A similar comparison can be made with the distance travelled. In 2002, official statistics show total travel in EU was over **2.2 trillion kilometres**. Historic vehicles travelled approximately **1.4 billion kilometres**, representing a mere **0.07%** of total circulation. A high percentage of historic vehicles travelled less than 1500 kilometres. This means that while some historic vehicles are used regularly they are not used to travel very far. The overall environmental impact resulting from fuel consumption and the distances travelled is extremely low, both relatively and absolutely. This is not to deny the environmental footprint made



by historic vehicles in any way. As with any form of human activity there is an environmental cost. However, as with similar heritage activities, the impact needs to be offset by the ways in which they are preserved and by the contribution they make to the social and cultural life of millions of people. Historic vehicles are not the 'normal means of transport' for more than a few keen enthusiasts. They are a leisure-based interest. In restoring and maintaining their historic vehicle, owners work to preserve our heritage. Much of their use, as indicated by the low distances travelled and high number of events attended, is likely to be generated by shows, exhibitions and club meetings.

Cultural and Social Activities

Most makes and marques of historic vehicle have a club dedicated to support their preservation and enjoyment. Although clubs with 670,000 members were surveyed, more exist. Most clubs are run on a voluntary basis, managed by committees. Their age varies but it is not difficult to identify clubs that have served their members for 20 or more years. Some clubs have been in existence for over **50 years**. This is a testament to the dedication of successive committees and support of their members.

Clubs by their very nature are social organisations. They often exist for the purpose of preserving a particular make and model of historic vehicle. One focus of activity is the harvesting of knowledge and skills of the members. This leads to provision of technical advice and in many cases, the re-manufacture by the clubs of obsolete components as well as the sourcing of other parts. There were over **6 million** attendances at historic vehicle events by club members; not all using their historic vehicle. Many of these events are also attended by substantial numbers of the general public. Public parks, town squares, stately houses along with international exhibition venues host numerable historic vehicle events each year. Two well known events, the

Techno Classica in Germany and the *Festival of Speed* in the UK between them have a third of a million visitors annually.

The interest in historic vehicles by club and non-club members is indicated by the number of road transport museums in the EU and levels of visitors. There are over **700** road transport museums attracting in excess of **75 million** visitors. Similarly there are over **100** magazine titles available dedicated to historic vehicles. The best selling titles account for an annual circulation figure of over **20 million**.

The evidence of this survey is that the stereotype of the historic vehicle enthusiast being a wealthy middle-aged male is unfounded. Whilst historic vehicles are clearly more interesting to men than women, the interest is one that spans the full range of social and income groups. Those involved are drawn from a very wide range of occupational and professional backgrounds. Moreover, insofar as the vehicles owned vividly portray the interesting artefacts of the EU's heritage, it is clear that such a definition is very widely drawn and is certainly not focused on any one era, vehicle type or valuation. Enthusiasts' interests are eclectic in all respects.

This is an impassioned movement making very significant contributions to cultural, social and economic life of the European Union.



Research Team

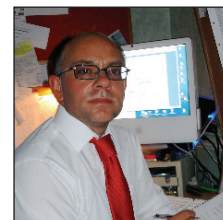


Dr. Paul Frost BA (Hons), MSc., PhD. Researcher

Currently Head of the School of Service Management, University of Brighton and has been engaged in education, development and research for over twenty years. He is co-founder and Chairman of the Historic Vehicle Research Institute, as well as co-founder and director of Motorbase.com, an organisation dedicated to facilitating the sharing of information to unite the historic vehicle community.

Dr. Chris Hart BA (Hons), MA (Econ), PhD. Researcher

Director of Midrash Publishing, Conferences and Research, co-founder and Vice President of the Historic Vehicle Research Institute, editor of two international journals and successful author. Worked for over twenty years as lecturer and researcher. Researcher on the 1997 Study of historic vehicles in Britain.



Geoffrey A. Smith Chartered MCIPD. Project Director

Past President of the FIVA Legislation Commission, Vice-President of the Federation of British Historic Vehicle Clubs, Chairman of the Classic British Quality Charter and co-founder and director of the Historic Vehicle Research Institute. Retired – past career in Motor Industry (Manufacturing, Engineering and Human Resources).

Ian Edmunds Administrator

An engineer, retired after thirty years in the car and motorcycle industries with French, Japanese and Anglo-American companies. He served ten years on the General Committee of the Federation of British Historic Vehicle Clubs and as Legislation Committee Chairman. He now works part-time in the historic vehicle movement.



All of the survey team are historic vehicle owners and club members themselves; between them they are custodians of 14 vehicles dating back to 1927.

FIVA National Project Managers

Victor Papadopoulos, Friends of the Historic & Old Cars of Cyprus, Cyprus

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