



THE HISTORIC VEHICLE  
MOVEMENT IN THE  
UNITED KINGDOM

*MAINTAINING  
OUR  
TRANSPORT  
HERITAGE*

RESEARCH REPORT



*"... to uphold the freedom ..."*



# 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 motoring heritage.



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## ***MAINTAINING OUR TRANSPORT HERITAGE***

**RESEARCH REPORT**

OCTOBER 2006



Published by the Federation of British Historic Vehicle Clubs (FBHVC) and  
The Fédération Internationale des Véhicules Anciens (FIVA) 2006.

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First Edition  
ISBN 1-905984-01-4

Printed by The Lavenham Press, Water Street, Lavenham, Suffolk, CO10 9RN

Photo credits: FBHVC wishes to thank the following:  
VMCC, NTET, Derek Grossmark, Steve Day, Rosy Pugh

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# EXECUTIVE SUMMARY

## This Research

The Federation of British Historic Vehicle Clubs and its subscriber clubs have participated in this research as part of a wider project being undertaken by the Fédération Internationale des Véhicules Anciens (FIVA) which involves eleven other national federations and their clubs. This Europe-wide survey of the historic vehicle movement, which has been undertaken with the assistance of industry and other institutions, is the first time an attempt has been made to measure activity within the historic vehicle movement across the whole of Europe. It builds on a national exercise that FBHVC undertook in 1997 and covers the twelve-month period from 1 July 2004 to 30 June 2005.

It is noteworthy that the British historic vehicle movement accounts for approximately a quarter of all historic vehicle activity in Europe. The remainder of this report refers only to the results of the British element of the wider survey. A separate report with the aggregated European results is available on request.

The 1997 survey demonstrated that the British historic vehicle movement is a significant contributor to the British economy. It is responsible for thousands of jobs in stable businesses that preserve a range of traditional skills that might otherwise be lost. This survey reinforces that position but because of differences in questions and methodology, it is not practical to make direct comparisons with the earlier results.

This recent survey has provided extensive data for a quantitative study of the scope and range of individual, trade and club based activities that relate to road transport heritage. This report focuses on the headline data to demonstrate the extent and value of the activity, but is only a beginning and cannot be considered definitive or complete. It serves to indicate avenues for further research.

## Methodology

The research is based on a questionnaire survey conducted during the autumn of 2005 covering the year 1 July 2004 to 30 June 2005.

There were three separate questionnaires: one for individual enthusiast members of FBHVC subscriber clubs to complete; one for specialist traders providing services to the historic vehicle movement and the third for FBHVC subscriber clubs.

- 215,000 individual questionnaires were distributed by 320 clubs.
- trader questionnaires were sent to 2,366 different addresses, either directly or by trade associations.
- club questionnaires were sent to all 385 clubs that subscribed to FBHVC at the time [that number has now risen to over 400 due to recent growth].

## Key Findings

### 1. Economic Activity

- Historic vehicle related activity is worth over **£3 billion** to the UK annually.
- Export trade is worth over **£300 million**.

### 2. Employment and Stability

- Over **27,000** people in the UK earn some or all of their living serving the historic vehicle movement.
- **81%** of businesses serving the movement have been established for over 10 years.

### 3. Number and Use of Vehicles

- There are over **400,000** historic vehicles that are roadworthy and licensed.
- Over 65% of historic vehicles travel fewer than **900 miles** per year.

### 4. Cultural and Social Activities

- **30%** of historic vehicle owners have a household income of less than **£20,000** per year.
- In pursuit of their hobby members of FBHVC clubs spend **740,000** nights away from home both within and outside Britain.
- **67%** of historic vehicles are valued at less than **£10,000**.

# INTRODUCTION

## FBHVC and our 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. It 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.



Historic vehicle activity, by its nature, is disparate and fragmented: it does not enjoy the status or public funding of other “heritage” interests such as opera, or the preservation of ancient buildings, or even heritage railways – it relies on the dedication and enthusiasm of those who own and preserve the vehicles. Whilst those individuals come together and unite in the clubs that form the backbone of the historic vehicle movement, the actual business of preserving the vehicles is very much an individual activity. The enthusiasts doing this work provide an invaluable service for future generations as, without them, few older vehicles would survive beyond their normal economic life. Posterity would be the poorer and future generations would be deprived of tangible examples of the machinery that underpinned so many social 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 transport heritage would first cease to be mobile, then fall into disrepair before ultimate disintegration. We cannot afford to allow that to happen to any part of our heritage, let alone one that has played such a major part in shaping our world.

## FBHVC

The Federation of British Historic Vehicle Clubs (FBHVC) is a prominent member of the Fédération Internationale des Véhicules Anciens (FIVA) which represents historic vehicle owners worldwide. FIVA has over 50 member nations, but 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 interests of society at large do not impinge unfairly on that all-important freedom of use. FIVA does this by maintaining close links with European institutions to highlight potential

problems and encourage regulatory solutions that satisfy both that need for freedom of use and the demands of daily traffic circulation. FIVA is a signatory to the EU Road Safety Charter and encourages the various European national federations to establish and maintain similar links with their own national governments.

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 Compound 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.

FBHVC undertakes similar work in Britain and liaises with government departments and agencies as well as with politicians to achieve the same ends. There are hundreds of thousands of individual enthusiasts in Britain who benefit from FBHVC's work, thousands of people working in businesses that depend upon historic vehicles remaining in use, and millions of members of the general public who 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 British and 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 freedom to use old vehicles.

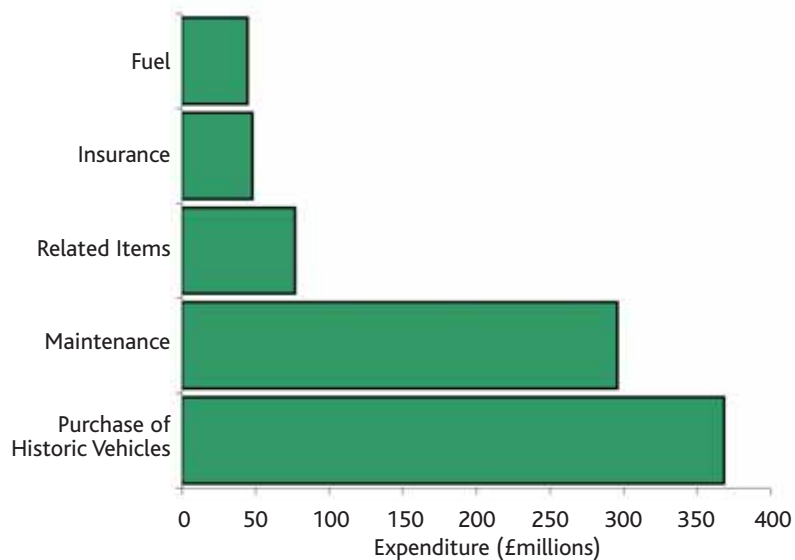


# RESEARCH FINDINGS

## 1. ECONOMIC ACTIVITY

Historic vehicle related activity is worth over £3 billion annually

- Businesses serving the historic vehicle movement generated **£3.2 billion** in trade.
- More than **2,500** businesses in the UK offer goods, services and products to the historic vehicle movement.
- **30%** of these businesses have an annual turnover in excess of **£1.7 million**.
- Exports are worth **£320 million**.
- **72%** of businesses export within Europe and **63%** beyond.
- Over **£830 million** was spent by FBHVC club members on insurance, purchase of vehicles, fuel, maintenance and other related items (magazines, books, models, clothes etc).
- The value of private sales of historic vehicles by FBHVC members is over **£160 million**.
- FBHVC clubs spent over **£3.75 million** on the printing and distribution of club publications.
- Overall expenditure by FBHVC clubs was approximately **£8.6 million**.

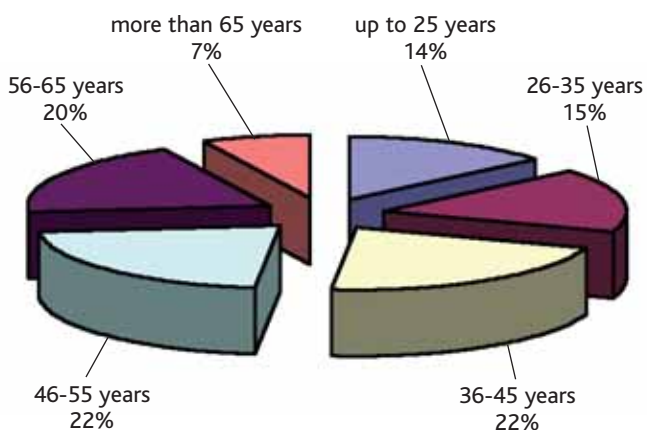


Expenditure by Members of Historic Vehicle Clubs

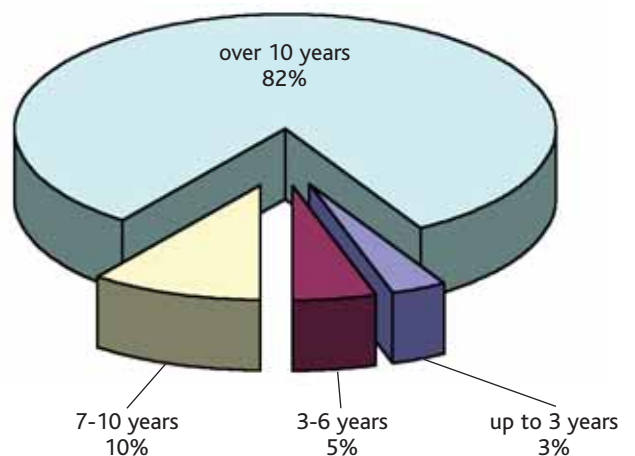
## 2. EMPLOYMENT AND STABILITY

Over 27,000 people earn some or all their living serving the historic vehicle movement

- Of the 27,400 people employed in the historic vehicle trade, 77%, work full time.
- 81% of businesses have been trading for more than 10 years.
- 70% of businesses have limited company status.
- 52% of respondents working in the trade are aged 45 years or under, with 27% above 55 years.
- Of the over 2,500 businesses known to be involved in the movement 52% have plans to recruit staff within the next 3 years.
- 60% of businesses trying to recruit new staff indicated they have difficulty in finding people with the right skills and knowledge.
- 20% of businesses offer apprenticeships and 54% provide training.
- 81% of businesses have a website.



Age Range of People employed in the Historic Vehicle Trade



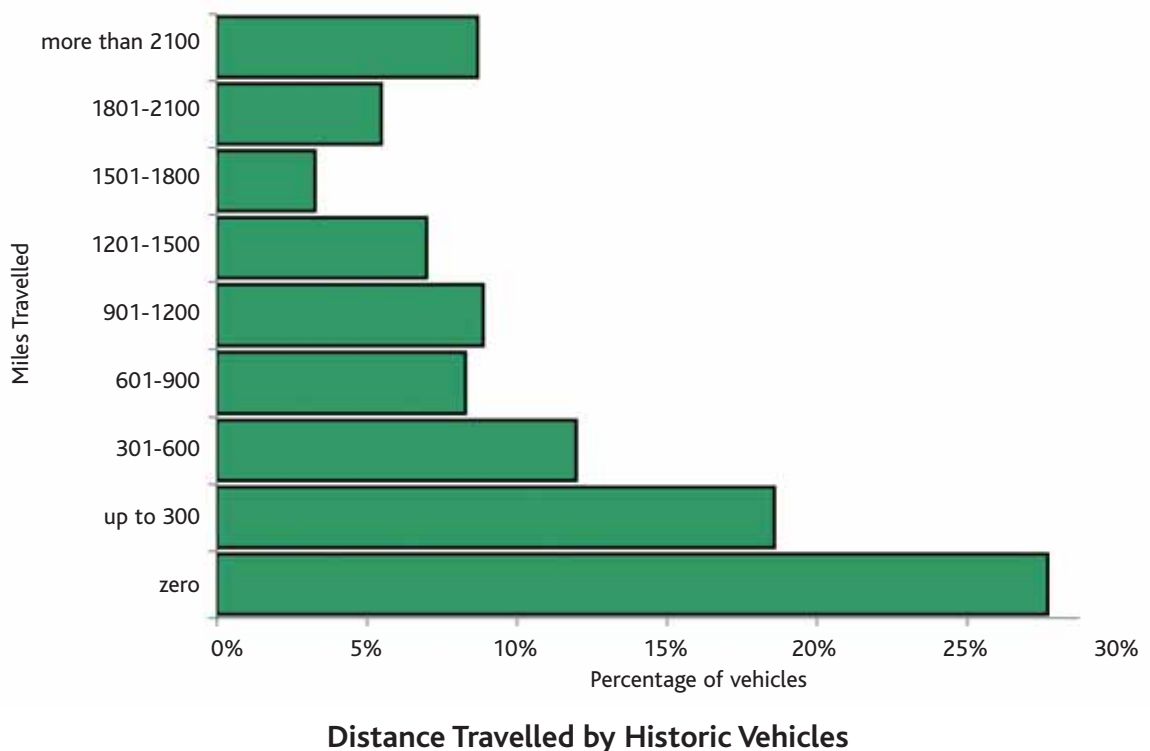
Length of Time in Business

### 3. NUMBER AND USE OF VEHICLES

Most historic vehicles in the UK travel less than 900 miles per year

- 83% of historic vehicles are used fewer than three times a week.
- 67% of all historic vehicles covered less than 900 miles in the year of the survey, including 20% that travelled less than 300 miles.
- 540,000 historic vehicles are owned by members of FBHVC clubs resident in the UK.
- 406,000 of these are roadworthy and legal (meaning they are licensed, tested and insured for road use).
- Nearly 32 million\* vehicles were licensed for road use in the UK in the survey period. Historic vehicles accounted for under 1.3% of these.
- Gross vehicle circulation was over 310 billion miles\* in the survey period. Historic vehicles use by FBHVC members accounted for 350 million miles, representing little more than 0.1% of overall circulation.

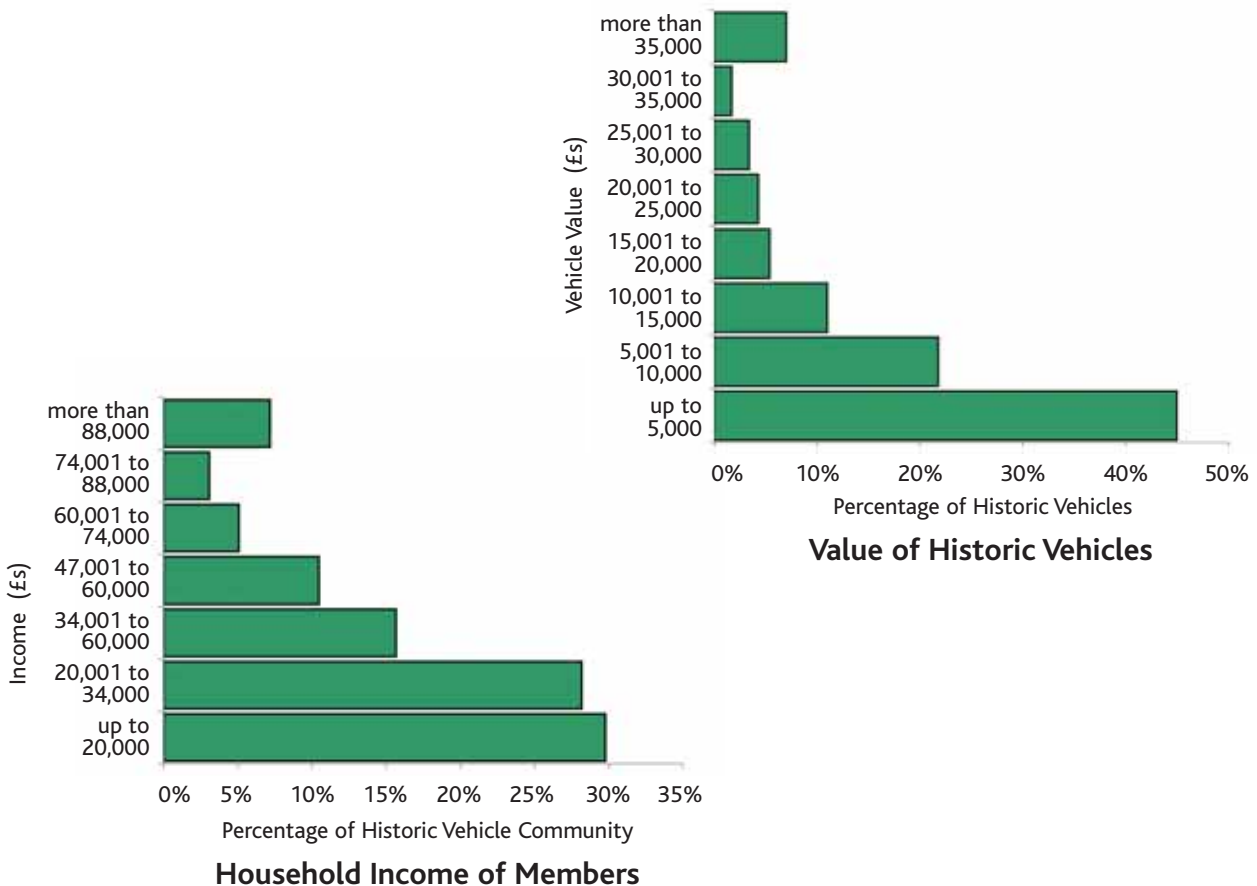
\* Department for Transport: Transport Statistics Report 2005.



## 4. CULTURAL AND SOCIAL ACTIVITIES

Almost a third of historic vehicle owners have household incomes of less than £20,000

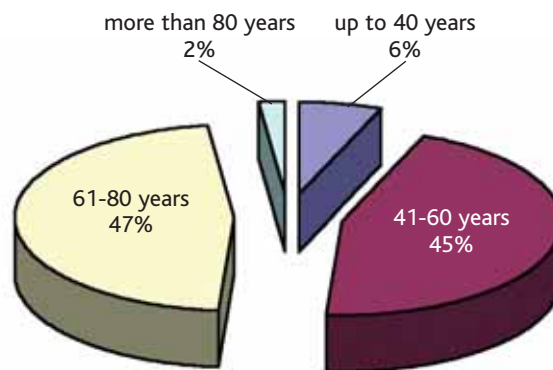
- 30% of members of FBHVC clubs have a household income of no more than £20,000 per year.
- Approximately 67% of historic vehicles are valued at less than £10,000.
- At the time to which the survey relates there were some 235,000 enthusiasts belonging to over 360 FBHVC subscriber clubs.
- 9,500 UK club members were also members of historic vehicle clubs based outside the UK.
- Members of FBHVC subscriber clubs spend 740,000 nights away from home both at home and abroad.
- Members provided over 1.1 million attendances at events including over 66,000 outside the UK.



## 4. CULTURAL AND SOCIAL ACTIVITIES

continued ...

- 45% of enthusiasts are between 41 and 60 years of age and 97% are male.
- Over 130,000 historic vehicles are being stored or worked on by enthusiasts.
- More than 81% of FBHVC clubs had a web site.
- Nearly all FBHVC clubs have a newsletter and/or club magazine; spending over £3.9 million in the year on printing and distribution of their publications.
- There are 150 transport museums in the UK, attracting over 5 million visitors annually.
- Magazines dedicated to historic vehicles have an annual circulation of over 3 million.
- FBHVC clubs raised in excess of £520,000 for charities.



Age Range of Club Members



# OBSERVATIONS ON THE FINDINGS

This report on the British historic vehicle movement is part of the first pan-European survey to assess the cultural, social and economic values that result from the interest in old vehicles. Inevitably, a broad study such as this raises as many questions as it answers: some measures have resulted in lower than expected activity; others higher – this section of the report comments appropriately and offers explanations.

## Economic Activity, Employment and Trade

Of the three surveys undertaken, it is the one surveying businesses providing services and goods to the historic vehicle movement that shows the significant value of the movement to the national economy.

We know there are many more businesses that supply the movement, but their primary focus is elsewhere, usually with modern vehicles. These organisations 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, fitting services, the supply of tyres, batteries and exhausts. Another important group of businesses that has not been included in the survey, again because they do not advertise, are the dedicated specialist businesses (often just one or two people) who have exceptional traditional skills and who derive their business from word-of-mouth recommendation.

We recognise that as a result the figure of **£3.2 billion** in trade is a very conservative estimate

since it does not include historic vehicle related business generated by companies whose main activity is in other fields or who have no need to advertise. It is a source of regret that relationships between the historic vehicle movement and the businesses that derive custom from it are not closer. If they were, the results of this survey would have been more inclusive.

The gap – some **£2 billion** – between the **£830 million** spent by members of FBHVC clubs and the **£2.9 billion** UK trade turnover is large. It does not seem unreasonable to speculate that this is due to the spending of four groups that are outside the UK FBHVC membership and consequently not surveyed:

- The small minority of owners of historic vehicles who have blue-chip historic vehicles (usually exotic cars) as part of a wide portfolio of general investments. They are often not members of any clubs, but have substantial spending power.
- Hidden exports. Many wealthy enthusiasts in the USA and Japan as well as continental Europe keep one or more historic vehicles (again usually high value cars) registered in the UK for use in high profile events. The cars are



UK based, so the work is not exported.

- Owners who are members of clubs that do not subscribe to FBHVC or who are members of no clubs at all.
- Members of the general public who are historic vehicle enthusiasts, but who do not own their own vehicles and are thus unlikely to belong to clubs. They nonetheless purchase substantial quantities of automobilia, historic vehicle related books, models, clothing, magazines and other paraphernalia.

Contribution to the economy comes in many shapes and forms – not just the direct trade referred to above. Historic vehicle clubs contribute significantly, particularly in respect of printing and postal services. Additionally, clubs provide business for insurance companies and are often also responsible for initiating the re-manufacture of parts. Clubs organise an amazing array of events, including tours at home and abroad. These encourage substantial spending in local economies on meals and accommodation as well as fuel replenishment. This spending stretches well beyond the actual event participants to include members of the public who follow such activity. An extreme example is the annual London to Brighton veteran car run

that attracts huge crowds, giving roadside cafes and inns the best day's trade of the year as well as filling the hotels in Brighton.

Members of FBHVC clubs spent over **750,000** nights away from home attending historic vehicle related events. They also accounted for over **1.1 million** paid attendances at events, including 66,000 abroad. It is safe to assume that most of the events abroad were within the regions of the 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 historic vehicle community due to the substantial level of cross border communication. The cultural and social fabric of Europe is strengthened by the inter-regional travel undertaken by those involved with historic vehicles.

With over **27,000 people employed** in historic vehicle based businesses, there are significant employment opportunities. It is notable that most businesses have been **trading for more than 10 years**, indicating a considerable maturity and longevity of the market. It is not difficult to identify businesses that have been in existence for 30 years and over. **52% of businesses** stated their intention **to recruit staff** over the coming years. It is, however, very important to note that



**60% of businesses reported having difficulties recruiting** staff with the necessary skills and knowledge. An analysis of the qualitative data indicates that some trade respondents find that even basic life skills such as the ability to write coherently are in short supply. A further investigation of these skills shortages is needed.

## 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 vehicles on the road.

Statistics provided by the Department for Transport stated that there were just under 32 million vehicles licensed for road use at the end of 2004 (the mid-point of the survey period). Historic vehicles owned by members of FBHVC clubs represent just under 1.3% of this number.

Ignoring the quarter of historic vehicles that travel no miles (those under restoration or awaiting repair/restoration), a quarter of the remainder are used less than 300 miles a year, and the majority cover fewer than 900 miles. This means that while some historic vehicles are used regularly they are not used to travel far.

The overall environmental impact is thus extremely low, both relatively and absolutely. This is not to deny the environmental footprint made by historic vehicles. As with any form of human activity there is an environmental cost, but environmental considerations have to be balanced against other factors. In this instance, the balancing factors are the preservation of our road transport heritage and the contribution the historic vehicle movement makes to the social and cultural life of large numbers of people.

Historic vehicles are not used in a day-to-day context by more than a handful of die-hard enthusiasts. Their use is a leisure based interest that encourages the restoration and maintenance of our transport heritage, and the low distances travelled coupled with the high number of events attended suggests that a substantial proportion of use is generated by shows and exhibitions – the

very events where our transport heritage is exposed to the general public in the most effective way.

## Cultural and Social Activities

Most makes and marques of historic vehicle have a club dedicated to support their preservation and enjoyment. The response to the survey of club activity was disappointing: it was the one element of the survey where there was an expectation of a near 100% response: as it was, it was around 50%. In most surveys, that would still be a superb result, but in this instance the trend was very much to receive responses from the smaller organisations with larger clubs failing to respond. This has resulted in club activity figures that are demonstrably low. The figures for club activity in the report have been recorded as found, and without application of any correcting factor: they are thus significantly understated. A simple example is the £8.6 million value of overall expenditure by clubs. Secondary data collected from the published accounts of the twelve largest FBHVC clubs shows that they account for £7.2 million of expenditure on their own.

Although 385 clubs were surveyed, many more exist – another 15 within FBHVC itself which were not subscribers at the time of the survey. FBHVC knows of at least fifty clubs with an interest in older vehicles that do not subscribe.

Most clubs are run on a voluntary basis, managed by committees. Their ages vary but it is not



difficult to identify clubs that have served their members for 40 or more years, there are many over 50, several over 70 and two have celebrated their centenaries, although not all of those founded before 1945 were created with the intention of celebrating older vehicles. This is an indication of just how deeply embedded in our national psyche the collective interest in road vehicles has always been.

Clubs by their very nature are social organisations, and much effort goes into creating activities that encourage members to get together which often also have the side effects of exposing historic vehicles to the public and raising funds for charity. There were **over 1.1 million attendances at historic vehicle events** by club members.

The general interest in historic vehicles is indicated by the number of road transport museums in the EU and levels of visitors. There are over **150 road transport museums** attracting in excess of **5 million visitors** annually. Similarly there are over **40 magazine titles** available dedicated to historic vehicles. The five best selling titles alone account for an annual circulation figure of 350,000.



The evidence of this survey is that the stereotype of the historic vehicle enthusiast as being wealthy is unfounded. Although the survey might support other stereotypes - such as being middle-aged and male – the majority of respondents were far from wealthy. 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, and although 97% of respondents to the survey were male (perhaps reflecting the predominance of male activity within clubs), it is unlikely that anyone observing those present at events would notice any significant gender bias as historic vehicle interest is very much a family activity.

And finally – just two comparisons: in the introduction, there was mention of a similar survey undertaken in 1996/7. That showed the value of the historic vehicle movement in the UK to be worth at least £1.6 billion to the economy. Nine years of inflation and differences in methodology due to the pan-European nature of this latest study account for no more than a modest part of the doubling we see being reported here. This suggests that the economical activity surrounding historic vehicles in the UK is a growing sector of the economy, despite the fact that circulation of historic vehicles has diminished from the 500 million miles shown in 1996/7 against 350 million in this report.

The other comparison is with the overall European study of which this survey is a part. The pan-European value of historic vehicle activity is reported as **€16 billion**. In round figures, the **£3.2 billion** headline value of the historic vehicle movement recorded in this report shows that the UK accounts for one quarter of all economic activity associated with historic vehicles in Europe.

The historic vehicle movement in Britain is, and always has been, a world leader: we invented the interest, we have fostered it and we have developed it. That position as world leader would be at risk if the freedom to use old vehicles was to be curtailed.

FBHVC exists to uphold that freedom, and this report explains why it is so important that FBHVC should succeed.

# 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**

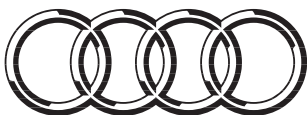
Past President of the FIVA Legislation Commission, Vice-President of the Federation of British Historic Vehicle Clubs, Chairman of the Classic British Quality Charter and co-founder and director of the Historic Vehicle Research Institute. Retired – past career in Motor Industry (Manufacturing, Engineering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



**FIVA wish to acknowledge the support and assistance received from the following:**



**Audi**



Mercedes-Benz



**AutoMuseum  
Volkswagen**

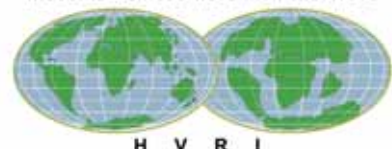


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