



FEDERATION OF BRITISH HISTORIC VEHICLE CLUBS

THE HISTORIC VEHICLE
MOVEMENT IN THE
UNITED KINGDOM

*MAINTAINING
OUR
TRANSPORT
HERITAGE*

RESEARCH REPORT

2009 Supplement



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

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INTRODUCTION

by Lord Montagu of Beaulieu

In 2005/6, the Federation of British Historic Vehicle Clubs (FBHVC) undertook a survey of the historic vehicle movement in Britain as part of a pan-European exercise.

The research report, *Maintaining our Transport Heritage* (ISBN 1-905984-01-4), published towards the end of 2006, provided important up to date information relating to historic vehicles and their use. That report was, and still is, of interest to politicians, environmentalists and government bodies. In particular it stated that historic vehicle activity was worth £3.2 billion per annum to the British economy, that it provided employment for over 27,000 people, and that the vehicle owners came from a wide cross-section of society.

The All Party Parliamentary Historic Vehicle Group received the data enthusiastically and agreed that it would help both to protect our freedom of the road and to demonstrate that vehicles are an important part of our heritage. The parallel report on the wider European picture was well received in the European Commission where the directorate responsible for the environment accepted that the number of vehicles, coupled with the modest distances they cover, had an insignificant environmental impact and therefore it was unlikely that historic vehicles would be targeted for restriction.

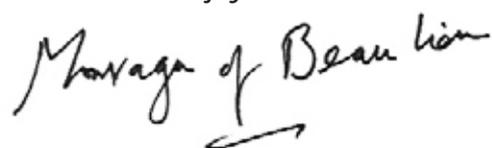
That 2006 report was based on machine-read data. The survey, however, had also collected

other information which was hand written and thus required manual analysis. The large number of forms to be checked (some 20,000) meant this was a particularly time consuming exercise, the results of which are contained in this supplement, which should be read in conjunction with the earlier report. We believe this will be of interest to traders, clubs and club members.

Such research has proved to be very important and beneficial for the historic vehicle movement, but it must be kept up to date and reflect the current situation if it is to meet the need for timely, relevant and accurate data on the importance of the historic vehicle movement. Such information is vital. Any interest group that does not adequately understand its own activities is extremely unlikely to be able to influence those less interested.

FBHVC is thus planning to repeat the survey in a couple of years' time. Clubs, their members and the trade will once again be asked for their cooperation in completing a questionnaire to provide information to support FBHVC's continuing efforts to keep historic vehicles on the road through evidence-based, reasoned argument.

Long may our road transport heritage be preserved and enjoyed!



RESEARCH FINDINGS

OWNERSHIP & USE

- The majority of owners consider their vehicles to be in very good condition
- Nearly 75% of owners buy their vehicles privately
- 60% of owners belong to more than one vehicle club and over 70% first joined a club more than 10 years ago
- 44% of owners have been club members for more than 20 years
- 68% of owners consider 'distance from home' an important consideration when deciding which events to attend
- Engineers of various disciplines make up the largest group of owners

Vehicles

Vehicle Condition

Vehicle	Condition%		
	Very Good	Average	Project/Poor
1st	69	23	8
2nd	59	24	17
3rd	54	25	21
4th	51	26	23
5th	49	25	26

Vehicle Sources

Vehicle	Source%				
	Family	Private	Dealer	Auction	Other
1st	6	68	20	3	3
2nd	5	73	16	3	3
3rd	5	75	14	3	3
4th	6	74	14	3	3
5th	4	75	14	4	3

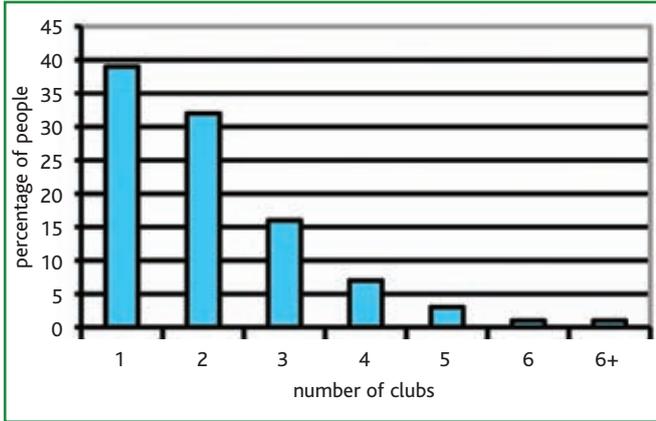
Events

Important factors in Selecting Events to Attend

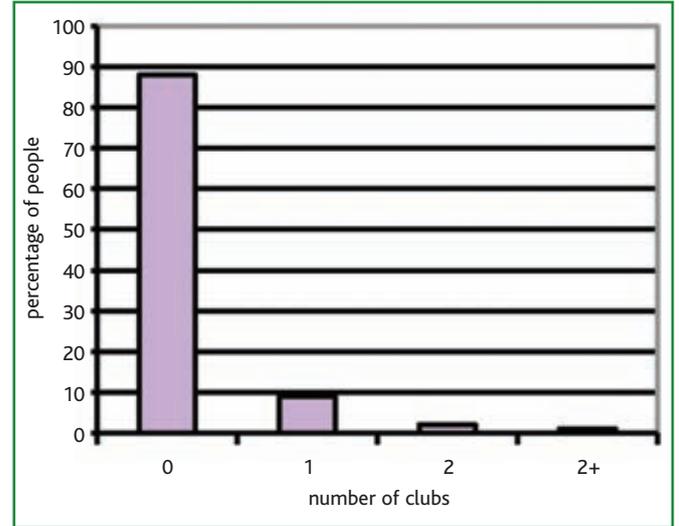
Importance	Very %	Imp %	Neutral %	Least %
Distance from home	21	47	26	6
Single marque	15	32	35	18
Value for money	13	43	33	11
Family friendly	15	32	35	18
Multimarque	8	26	51	15

Club Membership

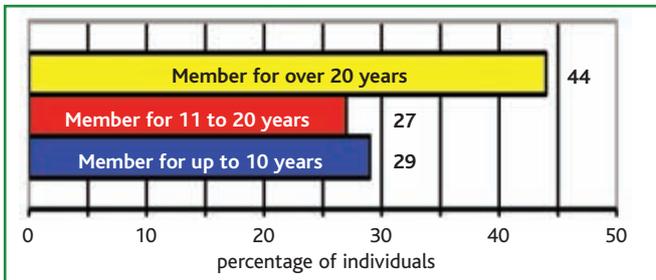
Clubs in the UK



Clubs outside the UK

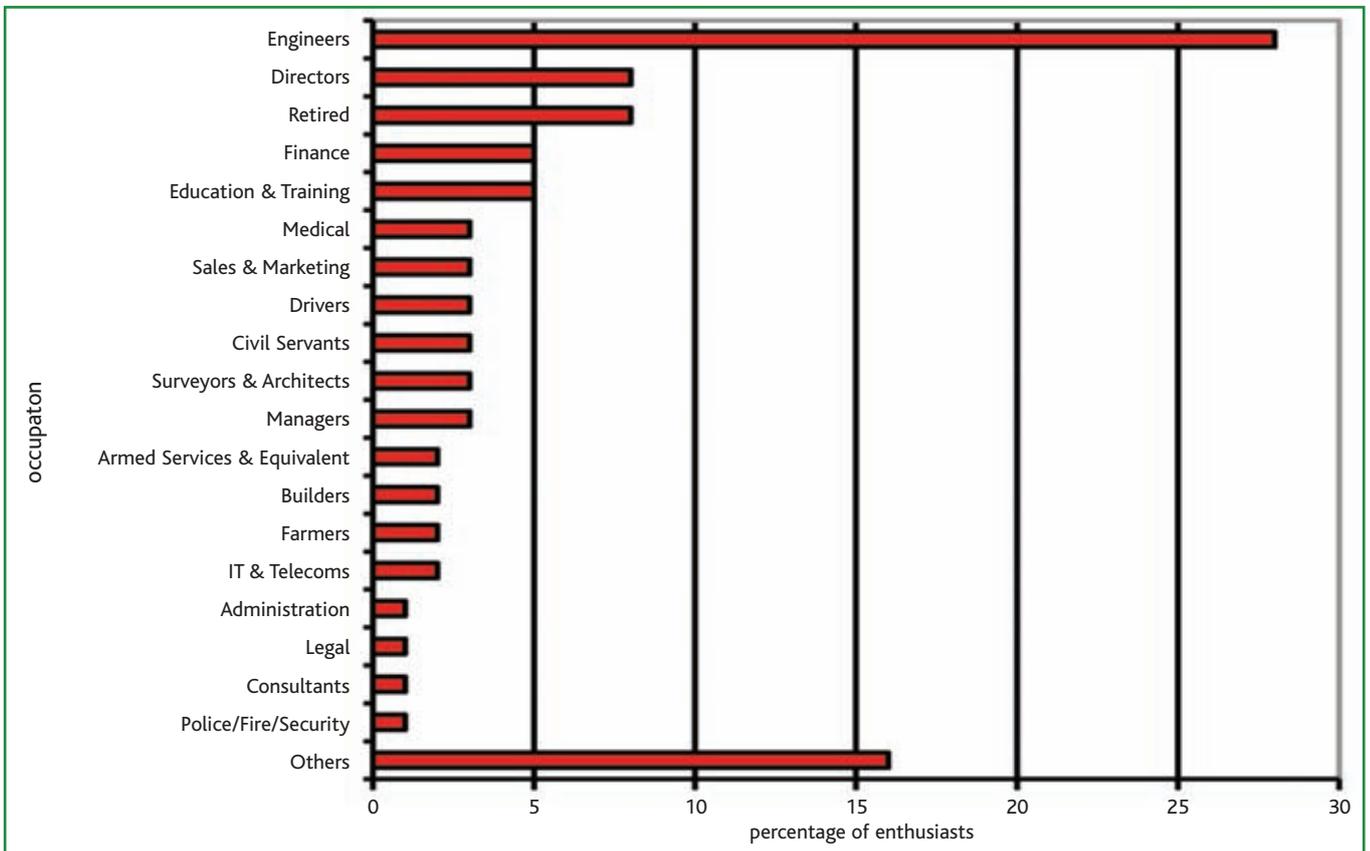


Length of Club Membership



Enthusiasts

Vehicle Enthusiasts' Occupations

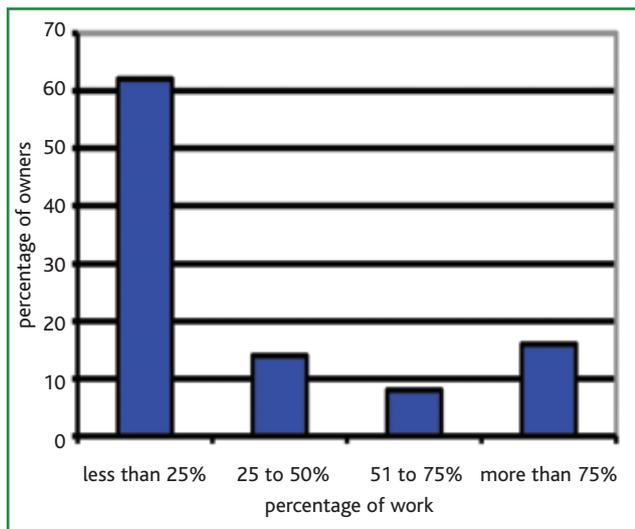


OWNERSHIP & USE *continued*

- Over 60% of owners outsource less than 25% of work to professional restorers
- Nearly 40% of owners say that they never use original parts from vehicle manufacturers

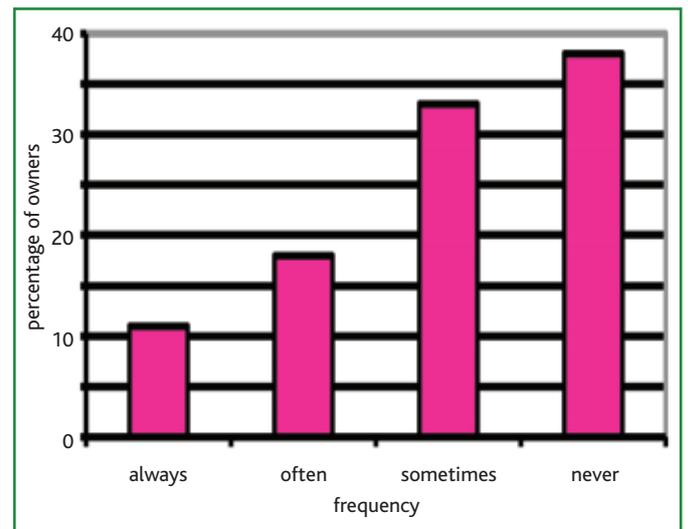
Restoration

Work Carried Out by a Professional Workshop



Parts Supply

Original Parts from Vehicle Manufacturer



TRADE AND SKILLS

- Most traders indicated that they were involved in restoration and parts supply
- The main skill shortage indicated by traders relates to engineering

Trade Activities

Activities	
1	Restoration
2	Parts
3	Engines/gearboxes
4	Dealers
5	Paint
6	Manufacturing
7	Competition preparation
8	Trim
9	Wheels/tyres
10	Electrical
11	Machining
12	Coach building
13	Instruments
14	Shows
15	Storage
16	Books/literature
17	Museum
18	Events
19	Models
20	Insurance
21	Rentals/weddings
22	Auctions
23	Publishing
24	Casting
25	Trailers
26	Clothing

Listed in order of the frequency mentioned.

Skills and experience most difficult to recruit

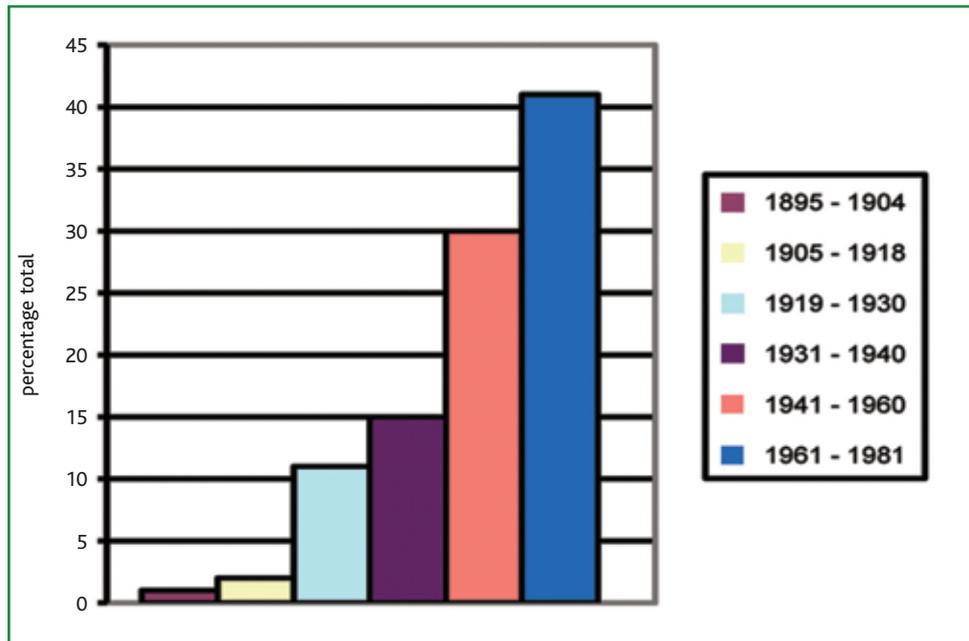
Skills	
1	Engineering
2	Bodycrafts
3	Parts
4	Welding
5	Painting
6	Fabricating
7	Trimming

Listed in order of the frequency mentioned.

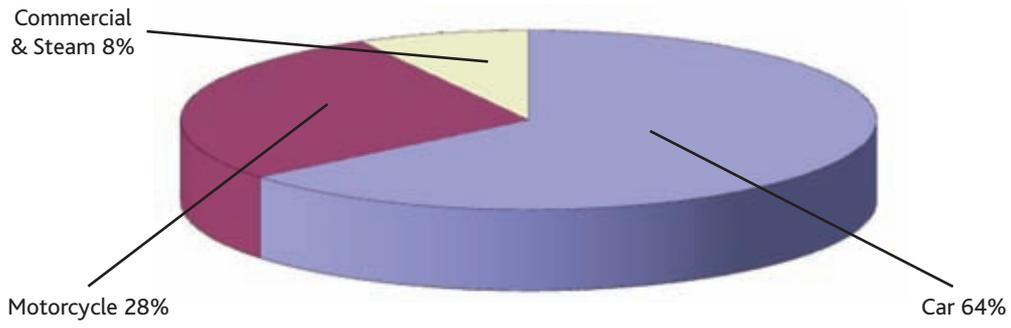
COLLECTORS' VEHICLES

- 29% of surviving historic vehicles were manufactured before the end of 1940
- The most popular preserved motorcycles were manufactured by BSA followed by Triumph and Norton
- The most popular preserved cars were manufactured by Triumph followed by Austin, Morris and MG

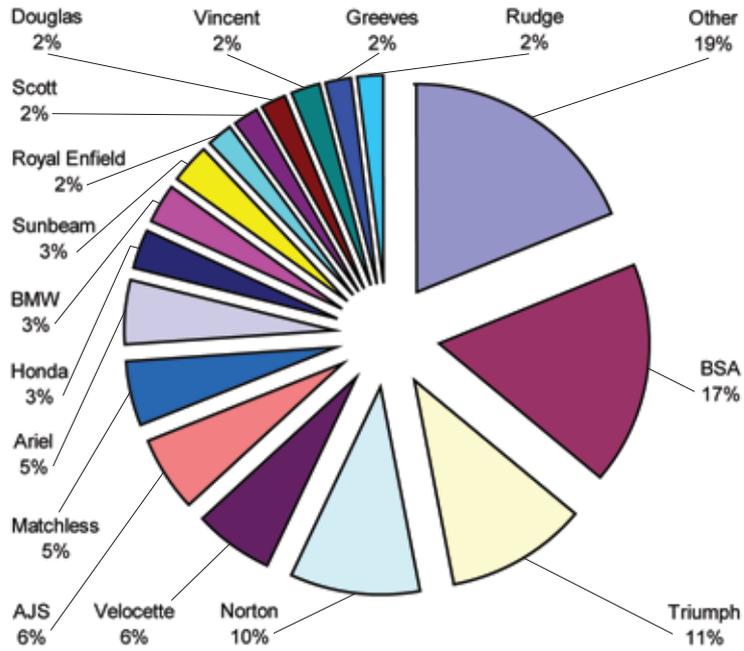
Preserved Vehicles by Period



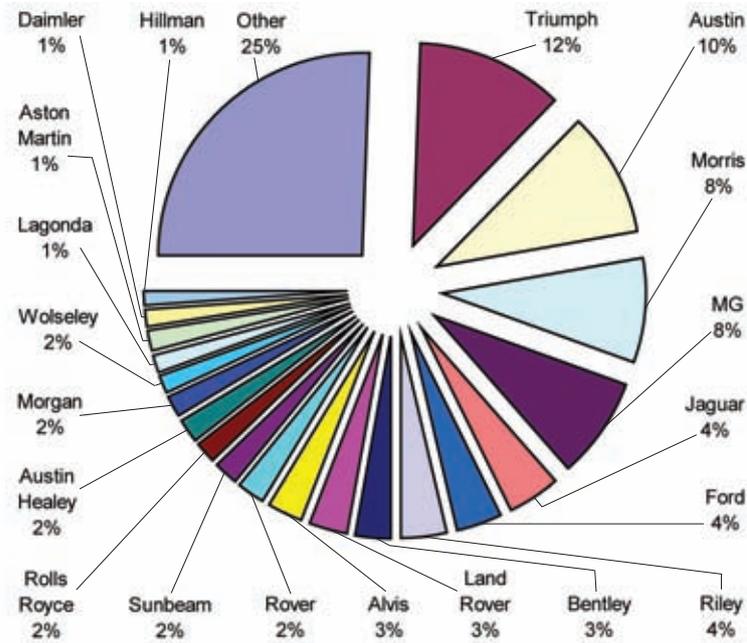
Preserved Vehicles by Type



Most Popular Motorcycles



Most Popular Cars



OBSERVATIONS ON THE FINDINGS

The manual analysis of data collected in the 2006 survey give no great surprises, but the importance lies in the fact that where we previously had no more than perception and assumption, we now have properly researched data derived from a substantial sample base.

OWNERSHIP & USE

The 2006 report stated that some 540,000 vehicles made before 1981 were owned by the 235,000 members of FBHVC's subscriber clubs, and that 406,000 of those were roadworthy. The tables on page 4 add to those basic statistics. It should be noted that neither the 2006 report nor this supplement considers ownership by those who do not subscribe to a FBHVC club.

Respondents were asked to list up to five of their vehicles, to give an assessment of condition for each, and state how each had been acquired. The majority considered their vehicles to be 'very good'. A consistent quarter of vehicles were described as 'average' (meaning, in this context, sound and roadworthy but not in show condition). Fewer than 10% of first-listed vehicles were 'restoration projects', a proportion increasing to 25% where five vehicles were owned.

Nearly three quarters of vehicles were acquired privately, with purchases from dealers accounting for most of the remainder. Only 3% were purchased at auction, which may surprise some given the extensive press coverage of this activity. The high proportion of private sales says something both about the knowledge purchasers have that gives them confidence to buy privately as well as their general trust in fellow enthusiasts.

There is undoubtedly a strong and active club culture in the UK with 60% of individual respondents belonging to more than one UK club and 12% belonging to an overseas club. 44% reported they first joined a club over twenty years ago. Analysis of declared occupation confirms that there are enthusiasts from all walks of life. The one profession that might be said to predominate is "engineer", at just over a quarter of those surveyed.

The 2006 survey demonstrated that historic vehicles account for little more than 0.1% of overall vehicle circulation. This critical statistic – showing that historic vehicles make an insignificant contribution to congestion and

pollution – is strongly supported by the analysis of criteria used to select events to attend. This shows distance from home as being uppermost in most enthusiasts' minds in the use of their vehicles.

TRADE AND SKILLS

Analysis shows a broad level of support activity, with restoration, parts and work on engines and gearboxes being the most significant. Much relates to use and routine maintenance as opposed to restoration. Over 60% do most of the work on their vehicles themselves, entrusting less than 25% to professionals.

Many trade responses indicated difficulty recruiting skilled staff, with hands-on engineering skills of all disciplines being the most difficult to find.

COLLECTORS' VEHICLES

The age and variety of preserved vehicles owned by those surveyed was remarkably evenly distributed in three bands – nearly 30% were pre World War 2, a further 30% up to and including 1960 and the remainder more recent.

The distribution of vehicles, 64% cars, 28% motorcycles with the remainder being commercial or agricultural (including steam) will not be of any surprise. The makes of motorcycles and cars recorded was very large. BSA, Triumph and Norton motorcycles and Triumph and Austin cars all reached double figures in percentage terms. 'Other' on the charts represents dozens of different makes, indicating not only the wide coverage of the survey but also the huge breadth of individual interests within FBHVC member clubs.

Although the historic vehicle movement in UK includes strong enthusiasm for many foreign makes, there were only two non-British names with sufficient representation to justify separate listing. This very heavy bias towards the products of British manufacturers demonstrates the importance of the historic vehicle movement to the preservation of national transport heritage.

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

Vice-President of the Federation of British Historic Vehicle Clubs, Past President of the FIVA Legislation Commission 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 13 vehicles dating back to 1927.





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