

AUSTRALIAN results from the largest-ever global survey of historic vehicle enthusiasts

FIVA, the World Federation for Historic Vehicles, has shared the results of its 2020/2021 international socio-economic of almost 55,000 historic vehicle enthusiasts worldwide.

The Council of Heritage Motor Clubs NSW fully supported the collection of data for Australia, and thanks its Affiliated Clubs and their members for their participation in the FIVA Survey.

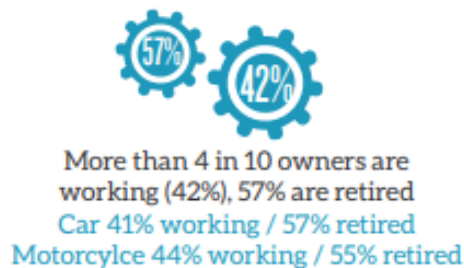
The Survey:

- revealed the historic vehicle movement's huge financial contribution to local and national economies,
- confirmed that, on average, historic vehicles travel extremely low distances and are primarily used for leisure purposes or as part of public events, and
- verified the important contribution of clubs to individual enthusiasts and the historic vehicle movement but also, through events and activities, to society generally and in preserving automotive heritage.

Australian results are based on 2430 surveys from Australian owners and enthusiasts, 2158 car owners and 297 motorcycle owners, covering 6511 vehicles.

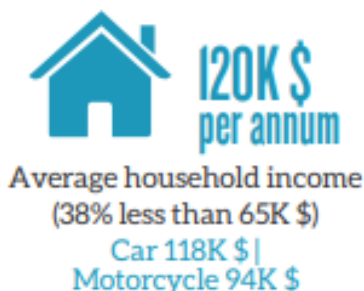
FIVA 2020/21 Socio-Economic Survey

PART A: HISTORIC VEHICLE OWNERS



96% are male with an average age of 66. 1 in 10 are 50 or younger.

42% are working, 23%, full time or 13% self-employed
57% are retired.



The average household income of a historic vehicle owner is \$120K per annum.

62% live in an urban city, 16% living in towns, 24% in a rural location, with 16% living in towns.

Nearly all owners (98%) are members of historic vehicle clubs (on average 1.8 national clubs). Around 26% are members of international clubs.

Most use "social media", Facebook - 60% of car owners, 70% motorcycle owners, more than 40% of historic vehicle owners use it daily. YouTube is used by 75%, but less frequently than Facebook - 20% use it daily.

Purchasing Power: Annual Spending by Owners

DIRECT SPENDING on historic vehicles



Average owner expenditure directly on their historic vehicle(s)

The **average owner spends** an estimated \$9700 p.a. on the maintenance and running of their vehicle(s) including insurance, repairs and restoration, storage, servicing and fuel.

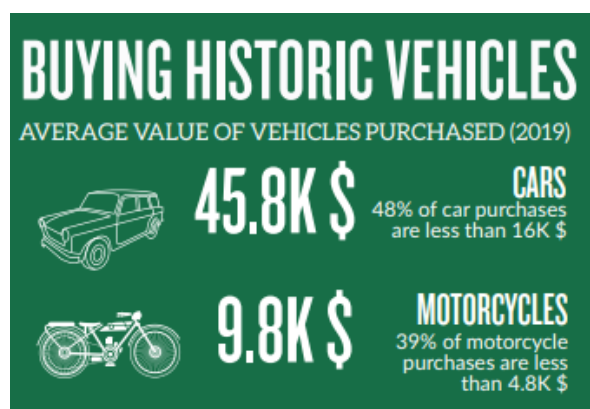
A **further \$2500** in attending historic vehicle events (entry fees, accommodation, food etc.) and \$600 on other items e.g. club membership, magazines.

TOTAL SPENDING on historic vehicles



Total expenditure on interest in historic vehicles (per owner)

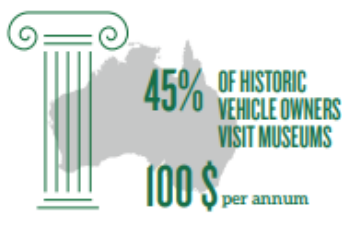
A **total of expenditure** of \$12800 per owner, per annum .



48% of **car purchases** less than \$16k,
39% of **motorcycle purchases** less than \$4.8K

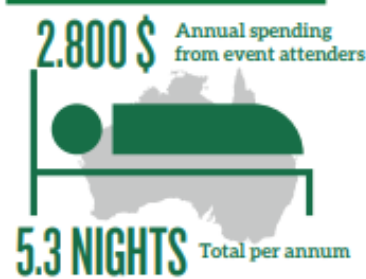
Events 91% attend vehicle events, spending around \$2800 per annum - including 63% for overnight accommodation on average of 5.3 nights per annum.

MUSEUMS



Heritage and Culture 45% visit historic vehicle museums each year and spend on average \$100 on entrance fees.

HISTORIC VEHICLE EVENTS



PART B follows covering Australian responses to the Survey on the HISTORIC VEHICLE FLEET

FIVA 2020/21 Socio-Economic Survey

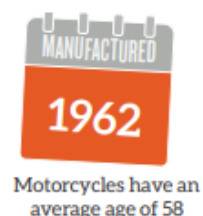
PART B: THE HISTORIC VEHICLE FLEET

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.

The fleet consists of 81% cars, 11% motorcycles and 8% other types of historic vehicles (commercial vehicles, ex-military vehicles, mopeds, etc).



The **average historic vehicle is 62 years old**, having been manufactured in 1958. Historic cars tend to be older (62 years) than motorcycles (58 years).



There is a **wide mix of marques** for historic cars and motorcycles including Jaguar, MG, Ford (USA), Holden, Triumph, Austin Healey, Chevrolet, Chrysler, Morris, Porsche for cars, and Honda, BSA and Suzuki for motorcycles.

The **average value of an historic vehicle** (based on owner estimates) is \$57K with cars being considerably more valuable than motorcycles \$16.5K.

A historic vehicle has been owned on average for 16 years.

Vehicle Condition



Around 79% of historic vehicles are described as in an original state. Higher for motorcycles 85% compared to 78%.

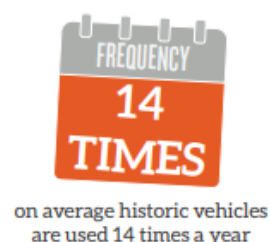
For cars - 22% original, 43% restored, 10% rebuilt, 12% authentic and 13% needing restoration.

For motorcycles - 29% original, 9% rebuilt, 12% authentic, 39% restored and 11% needing restoration.

Historic Vehicle Use

More than 77% are licensed for road use (cars 79% / motorcycles 73%).

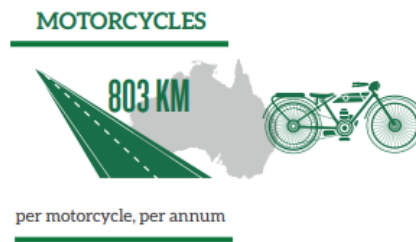
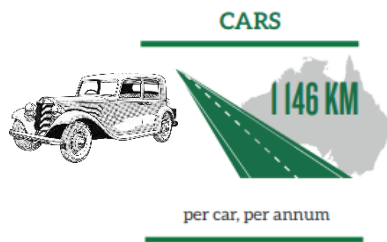
On average, historic vehicles are taken out 14 times a year (14 times for cars and 11 times for motorcycles).



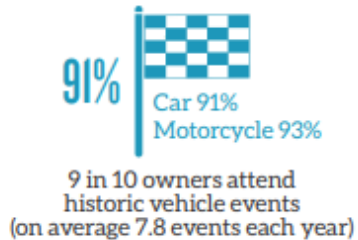
Vehicles used in the last 12 months primarily for short runs (55% cars and 58% motorcycles), and leisure driving (42% cars and 30% motorcycles).

Around 40% of cars and 18% motorcycles are used for travel to events, and 35% cars and 26% motorcycles used for organised tours.

On average, historic cars travel 1146 km and motorcycles 803 km per annum.



Events



More than 91% of owners attend events, on average 7.8 events each year.

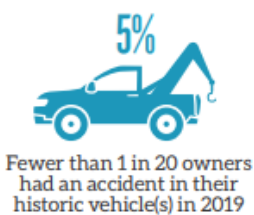
Owners travel an average of 1024 km to be at their favourite event (1051 km for car owners / 719 km for motorcycle owners).

Club (45%), National (23%) and Regional (17%) events are the most enjoyable to attend. More than 63% stay overnight at events (on average 5.3 nights per annum). Most stay in hotels (72%), B&B (17%) or camping/caravanning (14%).

Vehicles 20-29 years old (Youngtimers) 28% of historic vehicle owners own a youngtimer vehicle. Mostly passenger cars (77%) and motorcycles (10%). The main marques cars are Toyota (10%), Mercedes-Benz (8%), Jaguar (7%) and BMW (7%). For youngtimer motorcycles - Honda (19%), Yamaha (17%), Triumph (14%) and Kawasaki (12%).

The average age of these vehicles is 24 years. More than 85% youngtimer vehicles are licensed for road use and they are driven/ridden an average of 5466 km per annum (cars 4730 km and motorcycles 5600 km). The 84% of youngtimer vehicles are described as being in original condition.

Accidents with Historic Vehicles



Less than 5% had a road accidents accident in their historic vehicle in 2019 - cars 2%, motorcycle 4%, reporting damage as 42% minor impacts, 58% damage to panel, only 6% with structural damage.

FIVA VEHICLE DEFINITIONS

Historic vehicles 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.

Youngtimer vehicle is 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.

FIVA enquiries in Australia should be directed to TAVCCA <https://tavcca.org.au/contact/>

PART C follows covering Australian responses to the Survey on HISTORIC VEHICLE CLUBS

FIVA 2020/21 Socio-Economic Survey

PART C: HISTORIC VEHICLE CLUBS Summary and themes from 160 club surveys from enthusiasts responsible for running historic vehicle clubs in Australia.

Clubs are valued for supporting an array member services, including engagement through websites, social media and regular e-news; and for encouraging enthusiasts to maintain their vehicles in good working condition with technical advice from experts who support members in their restorations and repairs.

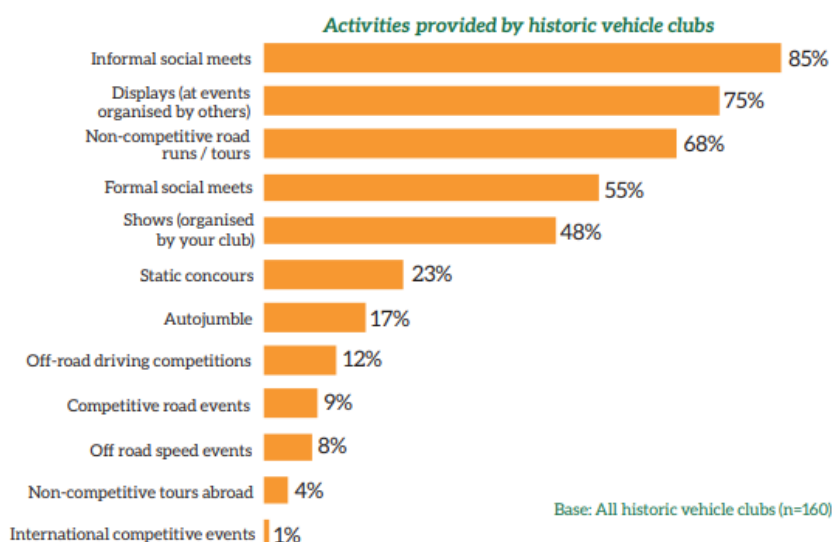
Size

- The average club had 278 members, although 20% had 50 or fewer members, 70% had 51-499 members and 10% had 500+ members.
- Around 41% of historic vehicle clubs describe themselves as local or regional (41%) in focus, 1% saying they are international, 6% a branch of a larger club and 11% saying they are national.
- The most common vehicle types catered for passenger cars (91%), motorcycles (49%), van (36%), truck (33%) and military vehicles (28%).
- The majority of club members own at least one historic vehicle (75%), and 27% own at least one youngtimer vehicle.



An affordable hobby. Average annual subscription of around \$50 per annum.

Clubs: An environment to enjoy being part of! Club members have access to a wealth of club and vehicle-related activities. **On average, a club will organise 18 events each year.**



What does being a member actually mean?

Getting out and about... Displays (75%) and non-competitive runs (68%).

Being social... Clubs create opportunity for get-togethers with formal events (55%) and informal social meetings (85%) - including AGMs, or simple get-togethers.

Getting competitive... some clubs show, 12%, provide off-road driving competitions, 9% competitive road events, 8% off-road speed events and 1% international competitive events.

Buying and selling... Around 1 in 6 clubs (17%) organise swap meet events.

Clubs provide a wide range of services Many of these are provided by volunteers in their own time and often at no charge. Services range from creating digital content shared through website or social medias to provision of spare parts either through sales/resale or original manufacture.

A SNAPSHOT OF SERVICES PROVIDED BY CLUBS IN AUSTRALIA



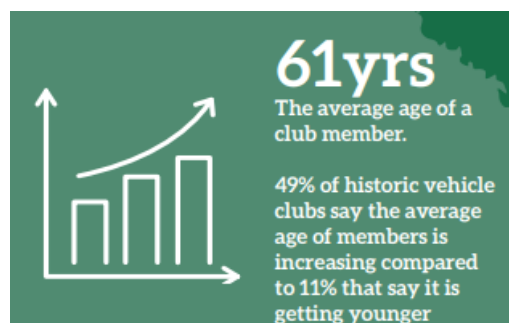
Base: All clubs (n=160)

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 regional (63%) or national (19%) in focus are more likely to provide digital content via websites (81%) and social media (69%) than 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 are far more likely to be local (57%) or regional (37%) in focus. These clubs are less likely to offer a website, but many do appear to adopt a social media approach for member communication.

Members are getting older! Nearly 49% say that the average age of their members is getting older, only 11% expecting the average age of members to be younger in 5 years time.

The Next 5 Years 50% of clubs expect their membership to grow, 24% expect their member numbers to shrink



Appealing to a Younger Generation

Around 13% clubs actively **provide special arrangements for younger members**, the majority (87%) don't. The larger clubs are more likely to cater for young members, but only 19% of large clubs do so.

Role of Social Media Many clubs around the world have been quick to build a digital strategy for communicating with members. In Australia, more than 62% offer social media content - most commonly Facebook (98%), but also Youtube (8%) and Instagram (7%). 92% of those utilising social media have appointed a social media manager, and 38% offer member-only content available from their social media channels.

As many as 35% now see **social media as a key way to engage their members**

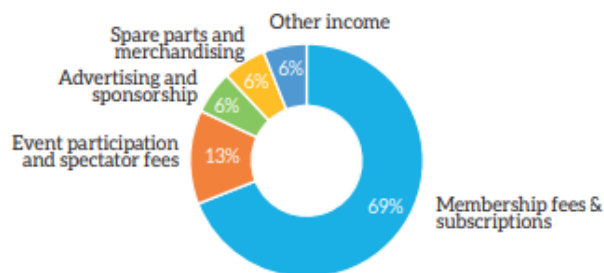


Club income The average annual income of a historic vehicle club is approximately \$48K.

As many as 59% operate on \$11.6K per annum. Membership fees account for nearly 70% of club income with event participation and spectator fees accounting for 13%

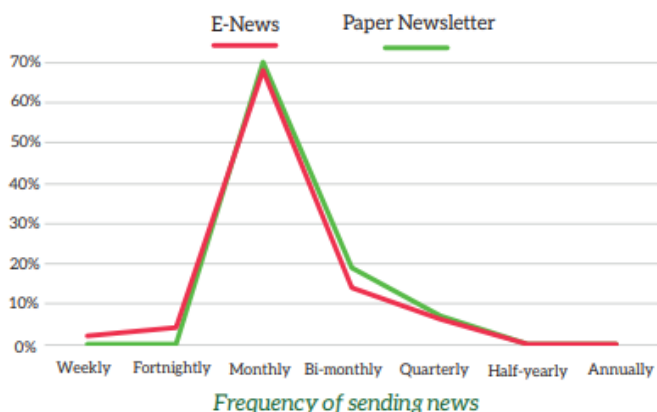
Supporting charity On average, a club raises \$1.4K per annum for charity.

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



COMMUNICATING WITH MEMBERS

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



Engaging members can be a major challenge for clubs. It seems many now use a digital approach with more clubs choosing this approach than the more traditional paper-based contact (78% compared to 51%).

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.

However, at present, the frequency of contact is typically monthly regardless of the method or means of communication (electronic or paper based).

Base: Historic vehicle clubs using means of communicating (n=125/81).

WHAT ARE THE POTENTIAL PROBLEMS CLUBS FACE?

The most concerning problems clubs foresee are

- the **ability of club members to use their vehicles on roads without stringent regulation affecting vehicle usage** (69% of clubs).
- 52% of clubs are **struggling to find new board members** to help support the continued running of their club
- 39% are **concerned about changing public perception and environmental considerations**
- 34% expressed concern about **availability of fuel in the future**.

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



69%

Regulation affecting vehicle usage



52%

Finding new board members / volunteers



39%

Changing public perception, environment considerations etc



34%

Fuel problems

The Council of Heritage Motor Clubs NSW acknowledges with gratitude the cooperation of FIVA - <https://fiva.org/en/> and TAVCCA - <https://tavcca.org.au/> in allowing us to share these Survey results with our members

Council of Heritage Motor Clubs NSW, 2021
www.heritagemotoringcouncil.org.au