

The world of historic vehicles in figures

FIVA's socio-economic research studies 2013-2014
Background and key findings

**Keeping yesterday's vehicles
on tomorrow's roads**



About FIVA

FIVA ("Fédération Internationale des Véhicules Anciens") was established nearly 50 years ago as the worldwide organization representing the interests of historic vehicle enthusiasts. It is a non-profit organization, registered in France, with members in over 60 countries of all continents. FIVA's members are the national organizations that are committed to the preservation of the motoring heritage in their country.

These federations of clubs of historic vehicle owners represent around one and a half million people. Their common goal is to preserve the historic vehicles they cherish, and to use them from time to time for the purpose they were built for: the pleasure of driving them! This is why FIVA's motto is: **yesterday's vehicles on tomorrow's roads.**

Historic vehicles are part of our culture and society

Our motoring heritage is a part of our culture. Historic vehicles give witness of the style, technical development and social economic evolution of their time. Over the years millions of people all over the world have preserved vehicles of all kinds, brands, types and price.

Many of these people spend much time, energy and money to keep their vehicles on the road and in doing so can be considered as caretakers of a vast and accessible museum of motoring heritage. Moreover, the historic vehicle movement has a considerable positive impact on the economy: it is not just beneficial to the thousands of businesses and their employees providing products and services to the enthusiasts, but it is also a significant contributor to the tourist industry.

FIVA's members enhance and enrich social and cultural life across the world - this research details the scope and value of this within Europe.

FIVA in the European Union

FIVA's key objectives are to safeguard the right of owners to preserve their historic vehicles and to defend their right to use their vehicles on public roads. Consequently, FIVA has to ensure that it has a voice in the development of relevant European Union policy and legislation.

As a part of this work, FIVA has supported the workings of the European Parliament's Historic Vehicle Group, which was established in 2009.

The Group's goals are to create a level of continuous awareness within the European Parliament for the specific position of the historic vehicle movement. The Group offers a platform where politicians, policy-makers and stakeholders like FIVA regularly can meet and have an exchange of information and views. Most recently, the Group was instrumental in helping to agree an appropriate definition of a historic vehicle for the new EU Directive on periodic road worthiness testing.

FIVA's definition of a historic vehicle

FIVA has a definition of a historic vehicle in order to allow a clear distinction to be understood between a historic vehicle and an "old" vehicle. FIVA's definition encapsulates the fact that a historic vehicle must be engine-propelled, it must be more than 30 years old, it must show a fair level of authenticity, both in appearance and technically and, as FIVA advocates responsible use, it notes that a historic vehicle is unlikely to be used as a daily means of transport.

The 2014 EU Directive on periodic road worthiness testing provides a definition of a historic vehicle which is very much in line with FIVA's definition.





FIVA, Fédération Internationale des Véhicules anciens, was created in 1966 to help historic vehicles enthusiasts throughout the world, via their national clubs or federations, to protect and promote the ownership and use of these vehicles, with the objective to preserve them as artefacts of industrial history and culture.

Having its roots in Europe FIVA from its beginning has been developing a close watch on European regulatory developments, realising its growing impact on the legislation of Member States and other European countries, and its trendsetting influence on traffic and vehicle regulations in other parts of the world as well. FIVA meanwhile has become a global organization, especially since major countries like the USA, Canada, Brazil, Russia, China, Japan, and India, have joined our federation.. Therefore our engagement in the European Union is in the interest not only of our members in the EU but of our members all over the world.

In the previous term of the European Parliament a fruitful relationship and open dialogue developed between Members of Parliament and representatives of FIVA, in which other stakeholders were involved as well, under the auspices of the European Parliament Historic Vehicle Group.

We are delighted to contribute to the continuation of this framework for effective cooperation with members of the newly elected European Parliament.

Such dialogue must largely be based on objective and up-to-date facts and figures. For this reason, FIVA and two of its Commissions - Legislation and Trade & Skills - with the help of prominent academics and consultants from The Netherlands, have been designing and leading a major international survey, which involved the personal contribution of 20,000 enthusiasts, and hundreds of clubs and professionals from fifteen countries in all parts of the European Union.

We are happy to present key findings of this major research work, and truly hope that it will provide useful information for politicians, policy makers and other major stakeholders. In particular, we believe that such information will be highly appreciated by decision-makers in countries which are opening up to the significance of historic vehicles as an important part of their cultural heritage.

Such findings will also undoubtedly help strengthen the links between representatives of the European institutions and FIVA, by identifying new avenues for research and opening new areas of collaboration and dialogue.

Our hope is that we'll all know better, thanks to this research, why it is legitimate to keep "yesterday's vehicles on tomorrow's roads".

*Patrick Rollet,
FIVA President*

The surveys were held in a time frame of April 2014 till 14th of July 2014. In total 14 languages were made available to prevent respondents to misinterpret the questions due to language issues. The translations of the original English questions was undertaken by GfK for the owners survey and by the local FIVA representative for the surveys for the business specialists and clubs.

Using different methods, ranging from direct mail to press publications, the surveys were brought under the attention of the target groups.

The surveys were checked and conducted by GfK (owners survey) and Fontys University of Applied Sciences faculty (Business & Club surveys) for consistency and neutrality. The results have been evaluated by these professionals as well ensuring objective reporting.

For the project FIVA closely cooperated as well with Delft University of Technology (Professor Bert van Wee, Professor of Transport Policy)



Patrick Rollet

FIVA's **services** to the historic vehicle enthusiasts



Legislation Commission

This commission deals with all future and current legislation regarding the use, preservation, and promotion of historic vehicles. This includes issues like vehicle registration, road-worthiness testing, low emission zones, bio-fuel and daylight driving light.



Utilitarian Commission

Trucks, agricultural vehicles, buses and other, usually bigger self-propelled historic vehicles including military vehicles are the prime focus of this commission.



Events Commission

The Events Commission covers all matters concerning the organisation, direction and management of events in conformity with FIVA's Events Code.



Culture Commission

The focus of this commission is on the cultural value of historic vehicles and their role in society. Therefore this commission also looks into the preservation of related objects such as factories, gas-stations, garages etc. that played a role in the history of motoring.



Motorcycle Commission

This commission looks after the specific needs and requirements of the historic motorcycles with regards to road safety, preservation and protection of this important part of the historic vehicle scene.



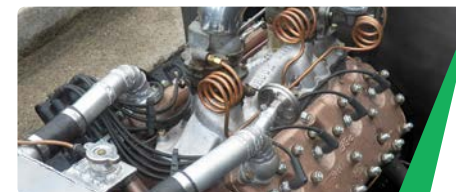
South America

This commission represents FIVA and adapts guidelines and recommendations to the local requirements and needs.



Technical Commission

Focussing on the preservation of historic vehicles, it sets guidelines (FIVA's Technical Code) and publishes the FIVA ID-Card that has proven to be instrumental in tracing the history of vehicles.



Trade & Skills Commission

Realizing the importance of the professionals for the enthusiasts this commission is committed to ensuring the preservation of skills and the availability of parts.



FIVA around the World

FIVA represents more than 1.6 million historic vehicle owners in more than 60 countries all around the world.

The need for more data and background information on the historic vehicle movement

Over the past 50 years the historic vehicle movement has developed from an activity of a few enthusiasts to a sector with considerable impact on social-economic life. FIVA knows that it is important to have a clear understanding of the size and value of this activity. FIVA's first EU-wide research was undertaken in 2005/2006.

Since then a number of FIVA's members have carried out surveys, but each only addressed its own national situation. In 2013 FIVA therefore decided to carry out a new European survey that would encompass each of the three "pillars" of the historic vehicle movement: the owners, the businesses supporting the owners and the world of enthusiasts' club.

Owners Survey

In April, May and June of 2014, FIVA's member organizations in Austria, Belgium, Czech Republic, Denmark, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Poland, Spain, Sweden and the United Kingdom actively encouraged as many owners, businesses and clubs in their countries to take part in the three internet-based surveys. The survey asked for information on all types of historic vehicle: passenger cars, motor cycles, mopeds and scooters, and commercial vehicles.

Even though most FIVA member organizations in the 15 participating countries have no direct access to the e-mail addresses of owners of historic vehicles, they succeeded in ensuring that nearly 20.000 owners completed the survey which consisted of a long list of questions. The result is data on more than 40.000 historic vehicles of all categories, from mopeds to military trucks.

Business Survey

With close to 1.000 business professionals responding to the survey from the 15 nations, the results show a clear cross section of this industry.

Participants were able to respond to questions on their current economics and how they see the future of their business. A number of questions was dedicated to how they keep knowledge available for future generations, something that clearly worries a number of respondents.

The business is dominated by small to medium size companies with a turn-over of less than € 100.000,- per year.

The internationalization of the business is clearly visible in the high usage of internet and selling and buying across borders. The open borders of the EU account for up to 60% of cross-border trading in some sectors.

Club Survey

Clubs play an important role in the historic vehicle movement as indicated by the 1.435 clubs responding. Not only do they play a role in keeping the vehicles on the road, they also play an important social role. This social role is not limited to the owners of these vehicles as over 63% of the clubs also participate in events that are held to support charities and other welfare causes.

For the tourist industry, events held by clubs are a serious source of income with considerable spendings for accommodation and food for multi-day events.

Although the average number of events per club is considerable, the average number of kilometres driven per vehicle during these events is limited. This underlines that ownership of a historic vehicle is not only about driving them but also sharing the design with onlookers and discussing (technical) topics with other owners.

A wealth of data

In this short-form brochure we highlight the headline results. However, the research gathered a wealth of detailed data, and FIVA and its researchers will continue to analyse the findings, and will do so based on the needs of policy makers, decision takers and stakeholders. We are open for all questions and suggestions in this respect.

FIVA Owners Survey

Historic vehicles are a major economic factor

Top 3 reasons of ownership:

42% Recreational touring, taking part in events and shows

27% Nostalgia

20% Doing maintenance, repairs, restoration jobs

Average number of historic vehicles per owner:

2,2 (Owners buy more than they sell)

Average use per vehicle:

1.433km

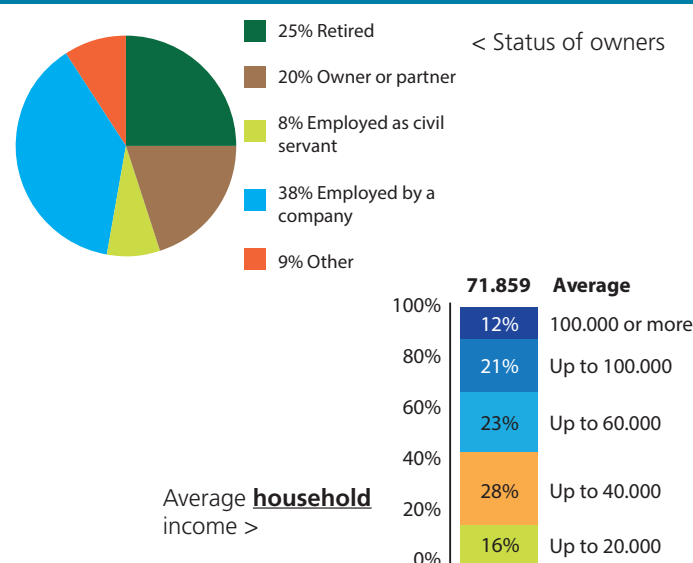
(all types of vehicles, based on 2.2 vehicles per owner)

The owner's profile

Income: The owners survey mostly was completed by men (98%!). Two thirds of owners indicate an annual household income (so not a per capita income!) of less than € 60,000.

Geographic spread: Compared to recent European figures historic vehicle owners relatively live more in smaller towns, villages and the country side than in average: 43% live in towns with less than 10.000 inhabitants or in rural areas. Approximately one out 3 owners live in towns with over 50.000 people, with 14% of owners having their home in a city of over 500.000. This shows that ownership of historic vehicles has to be taken into account in urban traffic and environmental policies.

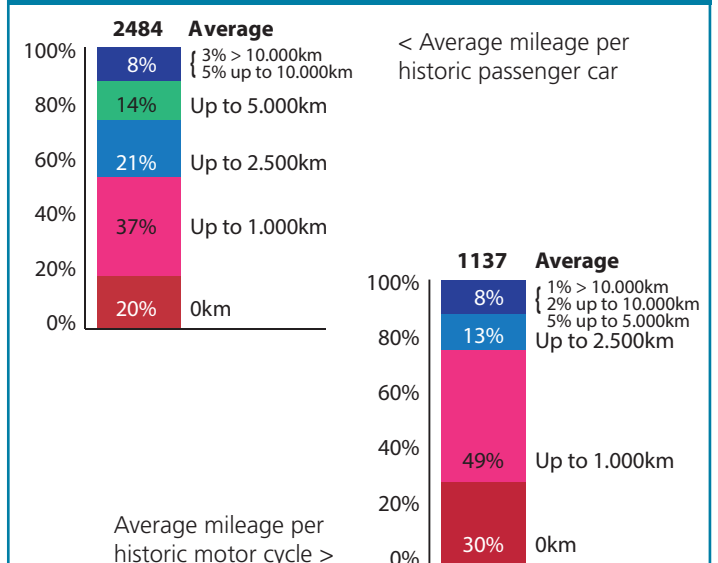
Age: The average age of owners is 54, and a quarter of them are retired. This gives evidence that the passion for historic vehicles is an important aspect of the social life of many retired people.



Usage pattern

When asked to define the main use of their historic vehicle, 42% of the respondents say: *recreational touring, taking part in shows and events*. 2% answered: use for daily transport. The average annual mileage of a historic (passenger) car is less than 2500 km. For historic motor cycles this figure is just over 1100 km. Historic scooters and mopeds drive even less: 728 km. The average for commercial vehicles is about half of that for passenger cars: 1263 km.

Three quarters of the owners indicate that they never use the vehicle for regular transport purposes. Of the other quarter, nearly 60% says that this use was exceptional, i.e. it was not a frequent occurrence. A typical historic vehicle owner only uses his /her vehicles 30 days per year. Because the typical owner has two historic vehicles, neither of them is used for more than 15 days on public roads. This confirms that historic vehicles are used selectively and sporadically.



Type of vehicles

The variety of historic vehicles is vast. The survey respondents had a choice from a list of over 300 vehicle brands, but many still had to fill in "other" because the brand of their vehicle was not listed by the questionnaire.

Commonly, these "forgotten names" relate to manufacturers that no longer exist. The enthusiasts that cherish their vehicles therefore keep industrial history alive that would otherwise only exist in documents and photographs.

Of note is the fact that the majority of historic cars owned by the respondents are one of the major European brands. And it is also interesting to see that an owner's modern/regular use car is often the same brand as that of one or more of their historic vehicle(s).

This seems to have been recognized by the manufacturers who are increasingly reflecting their heritage in modern designs and are increasingly investing in heritage departments.

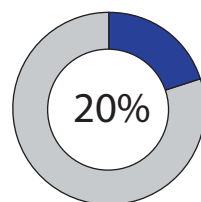
From an environmental perspective it is important to note that 96% of historic passenger cars have a petrol engine. The remaining 4% are equally divided by vehicles fueled by diesel and by the more environmental friendly LPG.

The characteristic of HV ownership

Owners not only use their vehicles very selectively, they also truly care for them: 94% of historic passenger cars and 97% of historic motorcycles are parked in a private or rented garage; and on average each has owned their car for 13 years and their motor cycle for 17 years.

In fact ownership is clearly a way of life as the typical owner has more than one historic vehicle, nearly 60% do maintenance and repairs themselves or with the help of friends and over 80% are a member of one or more historic vehicle clubs.

Buying historic vehicles



20% bought a historic vehicle in 2013

€ 13.421

is spent on by owners when they purchase a historic vehicle

Selling historic vehicles



€ 5.331

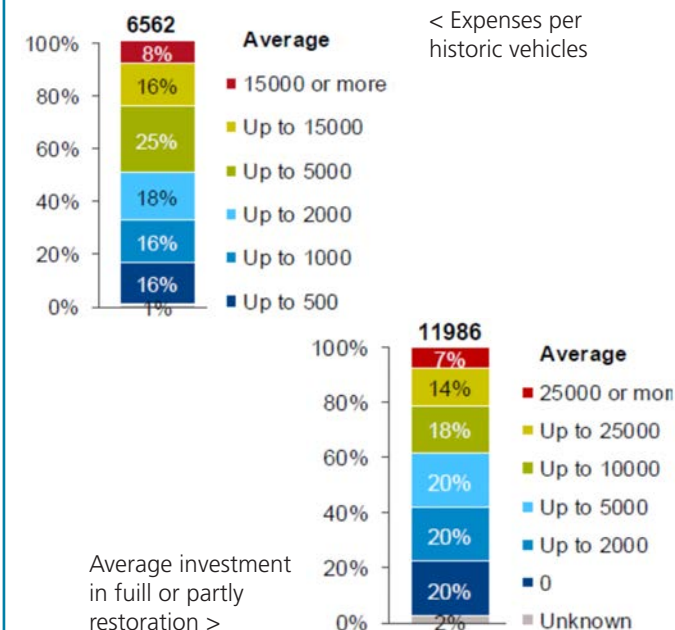
is the income from private sales from a historic vehicle

8% sold a historic vehicle in 2013

The HV as an economic factor

A historic vehicle certainly represents a considerable value. According to the owners' own estimates, a historic passenger car has an average market value of € 21.043,- while for historic motor cycles the average is € 5.659,-. Nevertheless hardly any owner (only 1%) see their vehicle as an investment object, the vehicle rather is an extra cost factor.

On average € 6.562,- was spent on historic vehicles in 2013 for restoration, maintenance and repairs, accessories, insurance and fuel. In the last 10 years 1,1 restoration projects per owner with an average cost of nearly € 12.000,- per vehicle were reported. With around 1,5 million owners of historic vehicles in the European Union one realizes that ownership and use of historic vehicles has created a market in its own right, with an annual turnover of billions of Euro's.



FIVA Business Professional Survey

Business professionals trade across the European border using internet and other modern media.

The 986 replies indicate that the business is maturing and getting more professional. Although many companies are small and see issues with regards to staff, the majority is optimistic for the future with regard to turn-over and profitability.

86% Companies trading via internet

4,5 Average employees per company

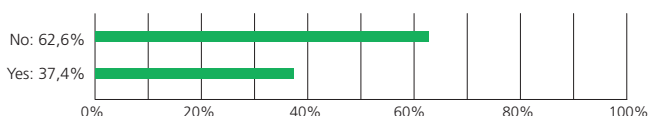
17% The percentage being able to give in-house training

Skills & Training

Doubt if specialized skills can be preserved is a common concern amongst the business professionals involved in restoration and maintenance. Most of the companies are too small, 39% between 1 and 5 employees, to do in-house training.

Although some countries offer official training- and education programs focused on historic vehicles, no Europe-wide educational system is in place to preserve the skills necessary for restoration and maintenance of older equipment and technologies.

Do you employ apprentices or trainees from time to time?



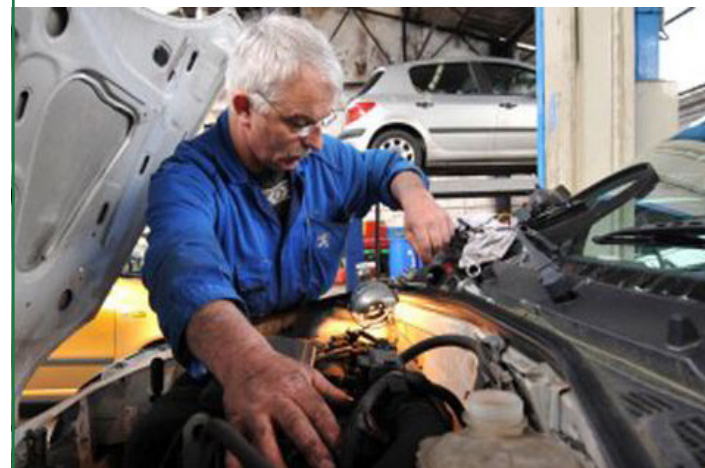
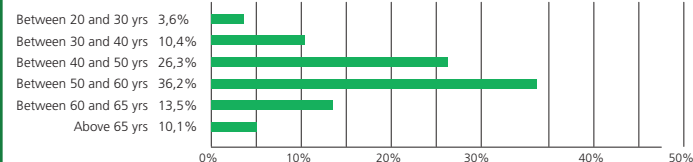
Average ages in the industry

The average age of the owner of a professional company is 57 years while the average age of his staff is 46 years.

Remarkable is the relatively long time people work at the same company: 36% for 5-10 years, 19% for 10-20 years. This could indicate the highly rewarding feeling one gets from working on historic vehicles and bringing a sometimes nearly ruined vehicle back to its former glory.

One could think that new staff will enter an environment with a stable outlook as far as job-security is concerned, but other survey results do not confirm this.

In what age group do you fit?



Business Professionals

With close to 1.000 business professionals responding to this specific survey, FIVA feels confident that this survey provides a good cross section of this segment.

The industry developed from one based on exchanging older components for less older or worn components to an industry that is supported by virtually all major manufacturers of vehicles and parts. A classic or historic department is now much more common than 10 years ago, indicating that the historic vehicle market is attractive both economically as well as for the image of the brand.

A considerable number of people that replied are in the service industry ranging from specialized insurance companies to full-time event organizers, storage companies and printing & publishing. This shows that the historic vehicle movement is not all about “greasy hands” but has grown to an industry with branches in many industries and service directions.

For those companies that are doing restoration and maintenance, a special section was available to investigate their views on the availability of skills, documentation and parts needed for their work.

The unavailability of “historical working techniques/tooling” provides an opportunity for scholars with an interest in technique and history to keep the cultural heritage of the automotive industry alive.

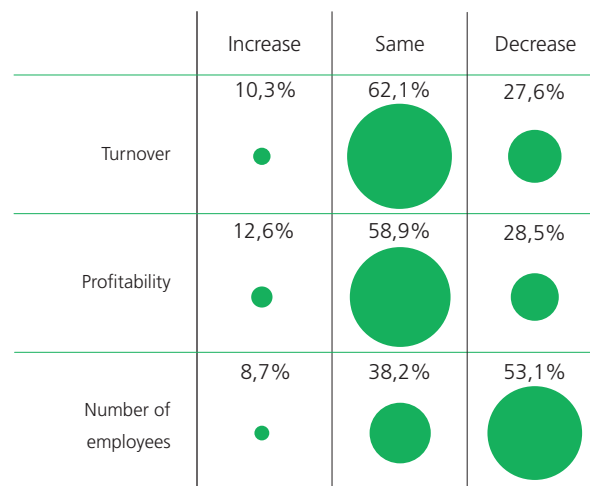
Future outlook

When asked about their views on the next 5 years, most respondents are not very optimistic. More than 25% foresee a reduced turn-over and profitability while 53% also count on a reduction in jobs.

This last issue is substantiated by 17,4% indicated finding qualified personnel might become difficult without good schooling and training in restoration techniques. ‘No time for training’ and ‘No successor’ scored 4,1% and 9,7%. All three together account for nearly 1/3 of the companies expecting challenges in these areas.

Other major concerns are the increasing cost (26,4%) and the difficulties having to comply to new regulations and laws (17,4%) that also bring substantial cost for these companies.

How about your views on the next 5 years for your business, what do you expect?



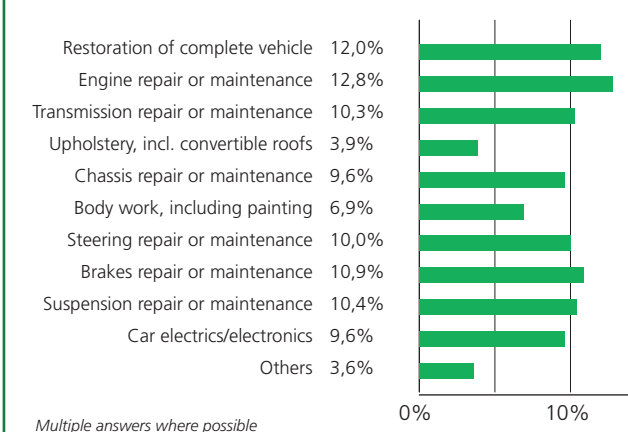
Industry variety

Those companies that are involved in the technical side of the historic vehicle business were asked to indicate what area has their main focus.

As can be seen from the graph, the most traditional one, upholstery and convertible roofs has the lowest number of companies. All others are more or less equal, a possible indication that many owners and workers in the historic vehicle branch now might have carved out a niche for themselves with the skills they acquired there.

Bodywork is expected to become a more specialized part of the business considering the increasing investments needed to comply to modern day emission standards and the use of different paints.

What type of historic vehicle or young-timer related technical business are you doing?



FIVA Club Survey

Clubs for historic vehicles play a strong social and cultural role!

1.435 clubs replied to our invitation to complete the survey.

Clubs ranging from very small, local clubs with 15 members or less to very large multi-national clubs with more than 2.000 members.

44% Clubs participating in social and charity events

91% Clubs that expect a stable or growing membership

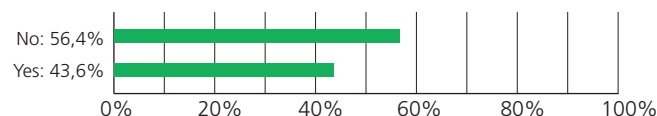
14% Clubs with international membership

The social side of Clubs

In 2013 43,6% of the clubs played a role in charity events and thereby often offer the underprivileged and sick the opportunity to get into contact with this important part of our culture while at the same time spreading pleasure amongst the participants and onlookers.

68% of these clubs offer this kind of support to charity organizations on a regular basis by including this kind of events in their event calendars.

Did your club participate in any charity events in 2013?

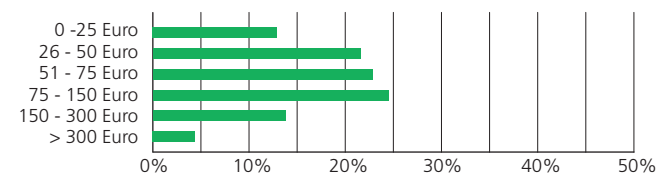


Clubs and tourist sector

With 57,3% of the clubs organizing multi-day events abroad, European hotels, campings and restaurants are major beneficiaries of the historic vehicle movement with considerable spendings on accommodation and food during these events.

63% of clubs organize at least 4 events per year, and 25% even do 8 or more. The thousands of events bring the "driving museum" to all European cities and regions, all weekends of the season.

Please estimate the average amount of money spend on the accommodation per participant per event.



Clubs: a cultural base

FIVA's main audiences are legislators, the national federations for historic vehicles that represent FIVA in their areas and thousands of clubs and their members.

These clubs play a major role in the historic vehicle movement and help their members in keeping their vehicles on the road. Many clubs also have their own historians that keep track of brands, types and models for generations to come.

The survey proved that clubs, of which nearly 1500 replied to the survey, are a stable basis for the enjoyment many have from historic vehicles and that these clubs play a significant role in keeping these vehicles on the road. International meetings aid in the understanding of cultures and local practices across borders as well.

Although these clubs play a major role, they are also confronted with some challenges such as finding suitable volunteers that are willing to take a position in the board and other supporting bodies.

74% of the responding clubs are aware of the goals of FIVA, underlining the position of FIVA as the leader in the historic vehicle movement and the organization that represents these clubs for legislative matters.

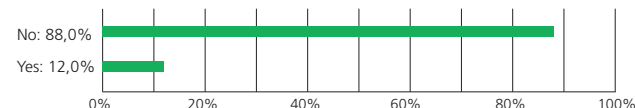
Spare parts offered by clubs

With the exception of a few, larger, clubs, the majority of clubs do not sell spare parts on an industrial scale. Of those that sell spare parts, only a few do so in order to generate a profit for the club and most are sold at cost price.

Based on their small sales volume, there is little or no competition for the professionals in this market, especially since most of the spares sold come from vehicles that are beyond restoration and therefore broken-up for spares.

Furthermore, the re-use of parts helps in reducing industrial waste and the preservation of historic vehicles.

Does your club sell any spare parts to its members?

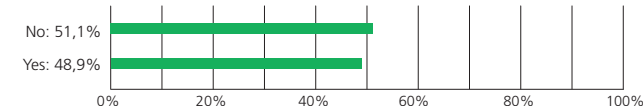


Clubs need more support

Despite the many rewarding aspects of club activities, finding volunteers for board- and other official functions is getting more problematic in the future according to the replies. Nearly 49% of current club boards foresee issues with finding a replacement board members in due time.

The positions most frequently mentioned are membership secretary and treasurer. Due to this, FIVA and its national representatives will look into programs to support these positions. Stronger support for volunteers in such positions, from governments and other institutions, could also help in overcoming these issues that might also be apparent in other clubs such as other social- and sports clubs.

Do you foresee any issues finding people that are willing to take a place in the board of your club?





Research of Delft University of Technology

For this socio-economic research FIVA closely cooperated with Professor Bert van Wee, Professor of Transport Policy at Delft University of Technology.



Taking into account the results of the owners and business surveys as initiated by FIVA he here comments on the environmental and safety aspects of historic vehicles, and also makes some remarks about the economic importance of the historic vehicle world in the EU.

Environment

Historic vehicles have much higher per kilometre emissions of pollutants like fine particulates, nitrogen oxide (NOx), carbon monoxide (CO) and volatile organic compounds / hydrocarbons (VOC/ HC). Preliminary results show that the share of historic vehicles in EU vehicle fleets is around 1%, the share in kilometres maximally 0.25%. The share of historic vehicles in emissions by all vehicles is a few percent (for PM10 and NOx roughly 2-5%) although growing because the shares of historical vehicles are increasing, and emissions of new cars are decreasing due to EU regulations.

Per km CO₂ emissions of historic cars are only slightly higher than fleet averages. This is because new cars have become hardly more fuel

efficient since 1985 as technical progress was compensated by a trend towards larger, heavier, more powerful, and more comfortable (e.g. air conditioning) vehicles, up to around 2005. Since then cars are becoming more fuel efficient under test conditions, but way less in real world conditions. Because yearly use of historic vehicles is relatively low (passenger cars: about one sixth of fleet averages) per car CO₂ emissions are way below fleet averages. Producing a car also takes energy, about 15-20% of life cycle energy use. The longer a car lasts, the lower this share.

Safety

One would expect historic vehicles to be relatively unsafe because both active safety (brakes, handling) and passive safety (impact of crashes) are below those of modern vehicles.

However, per km fatality rates of cars older than 30 years are roughly as high as those of modern cars. Historic cars are per kilometre (and even more so per year) way less than average involved in accidents, probably because owners drive carefully, mainly in nice weather, and hardly in heavy traffic.

Economic importance

Based on owners expenses a rough estimate is that historic vehicles in the EU generate around 100,000 to 140,000 jobs. And historic vehicles generate well-being, first of all for their owners, but also for others, such as people who see them parked and driving at events.

Photo by Jet Vugts

Synopsis

This research shows that the historic vehicle community adds value to our society in many respects, not only in an economic sense, but also culturally and socially. Owning and driving a historic vehicle is a passion that is shared by well over a million people all over the EU. Most are members of a club of like-minded enthusiasts. Their common passion joins people from all walks of life, independent of their background and status. They meet each other in places that they, in many cases, otherwise wouldn't have visited, in their own country and across borders. The clubs are the driving factor behind this activity, as evidenced by the thousands of events they organize.

The business survey provides a snapshot of the variety and scope of the historic vehicle sector. There are some large players in the market, some of them closely linked with well-established companies of the European automotive industry. But most are small businesses, and in some cases the historic vehicle business earnings are additional to those of their regular job. The fragmented character of these businesses and the lack of a central umbrella organization in most countries make it difficult for FIVA to provide exact figures on the scale and value of the sector. The turnover and employment data that we do present are therefore estimates – but they are conservative estimates. Further study is needed. The research has though conclusively shown that many businesses have difficulty in attracting qualified personnel. This is a real concern and does need to be addressed. Development of educational and training programs at EU level is one of the options to resolve this concern.

The responses of the nearly 20,000 people that completed the owners survey clearly confirm that they treat and use their historic vehicles very differently to their cars and motorcycles owned for daily use. The use of the vehicles is very limited, mostly for taking part in events or for recreational touring in scenic regions, to the benefit of the European tourist industry. When they are used, they become a focus of attention, - it is very common to see heads turn and smiles to beam from faces when a historic vehicle drives down a road. The amounts spent by owners for keeping their vehicles on the road vary greatly, depending of the type of vehicle – it costs more to preserve a heavy duty truck than a moped – and of course depending on the owner's disposable means. But the variety of vehicles and owners proves that owning and enjoying a historic vehicle is popular across all segments of society and that a modest income is no barrier to becoming part of the community of historic vehicle enthusiasts. And while these owners invest their time and money in their passion for their historic vehicles in doing so they are also preserving European motoring heritage to the benefit of as all.

FIVA will continue to collect and analyse facts and figures relevant for the objective it has set: ***yesterday's vehicles on tomorrow's roads.***

Project management:

- Tiddo Bresters - FIVA: Owners survey and overall coordination.
- Jos Theuns - FIVA: Business & Club surveys, survey publications.
- Andrew Turner - EPPA: EU-Consultancy, MEP Coordination.



These surveys were held on behalf of the International Historic Vehicle Federation FIVA, in cooperation with national federations for historic vehicles and where aimed at owners, business professionals and clubs in the historic vehicle segment.

With these surveys FIVA aims to get important information on the social and economic aspects of the historic vehicles sector. The replies are now compiled into 3 reports that can support the following stake holders:

- Politicians and policy makers on the size and importance of the market and the economic impact
- Educators and training centres for young people entering this market as a professional
- The industry itself, in order to create higher awareness of its importance and historic values.

The countries pictured in green participated in this survey. The 3 surveys were held in different target groups, enabling the cross referencing of information as a further check for integrity and correctness.

Privacy: no individual information is logged during these surveys and no individual information can or will be provided to third parties.



Fédération Internationale des Véhicules Anciens (FIVA)

FIVA's place of registration: 6-8 Place de la Concorde, F-75008 Paris, France

FIVA Operational office and correspondence: Rue de la Loi 44, B – 1040 Brussels, Belgium

Tel.: +32 2 280 01 44, Fax: +32 2 280 04 46, E-mail: info@fiva.org, www.fiva.org