

FIVA 2014

Socio Economic Research Key Findings

**Inaugural Meeting of the European Parliament
Historic Vehicle Group**

Brussels, October 14th 2014

Programme for today

- **Mr. Bernd Lange**, MEP and Chairman of the EP Historic Vehicle Group
- **Mr. Patrick Rollet**, President of FIVA
- Introduction and background of the study
- Research findings presented by:
 - **Mr. Ewout Witte**, Research manager of GfK Market Research
 - **Prof Bert van Wee**, Transport Policy professor at Delft University of Technology
 - **Mr. Jos Theuns**, Chair of FIVA's Trade & Skills Commission
- Time for Questions and Answers
- Closing remarks

Introduction & background

Need for more data and background information Historic Vehicles (HV's)
15 countries across EU, April/May and June'14, All HV's

1. Owners survey

- ± 20.000 owners
- + >40.000 HV's
- Ownership?
- Usage?
- Spending?

2. Business Survey

- >1.000 participants
- Cross section industry
- Skill set?
- Cross border?

3. Club Survey

- ±1.400 club responded
- Memberships?
- Social role?
- Tourist industry?

As a result: a wealth of data!

Research findings will be made available



FIVA HISTORIC VEHICLE STUDY 2014 PRESENTATION

A quantitative study focusing on owners of historic vehicles in 15 countries

Ewout Witte

Research design



Response

19.432

Respondents
(only completes)

43.612

Total number of
Historic Vehicles

7.956

Total number of
Youngtimers

- Study in 15 countries
- 12 minute questionnaire
- Fieldwork: 26 March – 16 June 2014
- Open link on national FIVA websites
- Language per country
- Currency converted for non € - countries

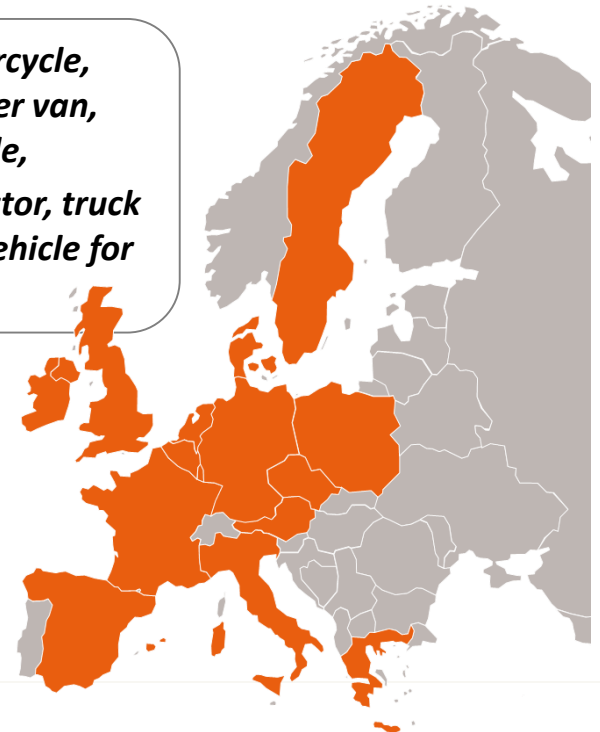
Historic Vehicle: motor vehicle, > 30 years old

Young-timer: motor vehicle, 25 - 30 years old

"It can be a car, motorcycle, moped, scooter, camper van, commercial vehicle, military vehicle, bus, tractor, truck or other self-propelled vehicle for road use"

Topics of questionnaire

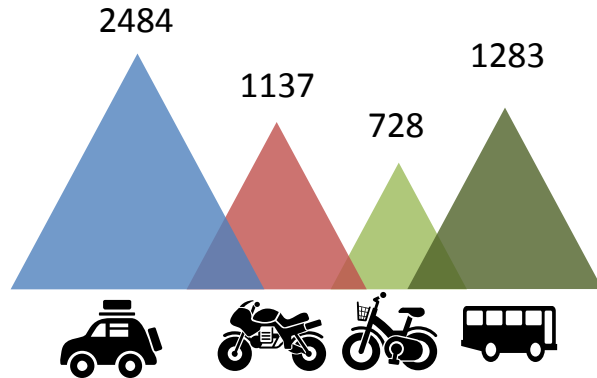
- General historic vehicle questions
- Public road use
- Historic vehicle-related expenses and income
- Specific costs for historic vehicles
- Activities relating to historic vehicles
- General young-timer questions
- Socio-demographic data



Public road use all historic vehicles



Average km driven in 2013



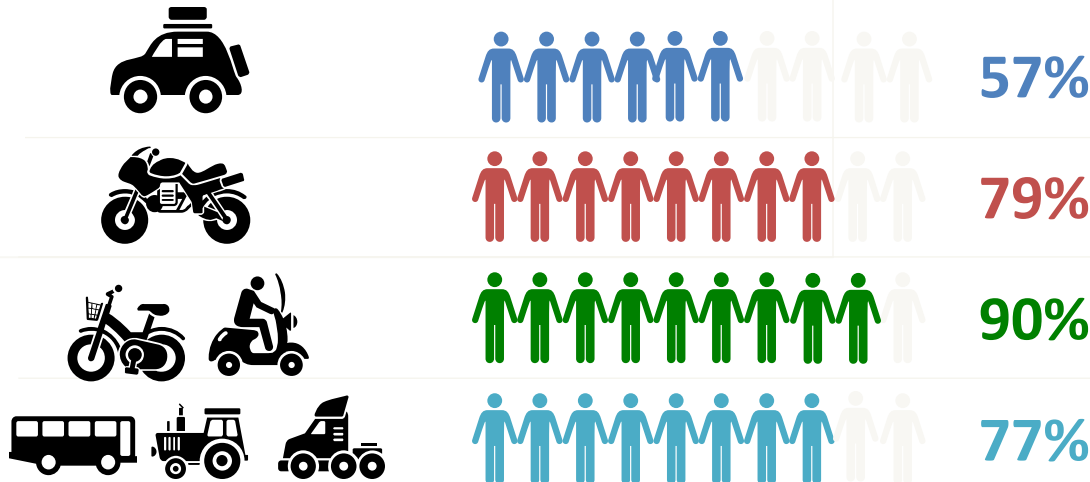
Average mileage per vehicle

1,433 km

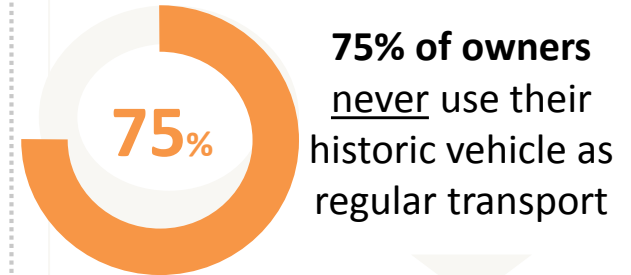
How many days in 2013

32 days

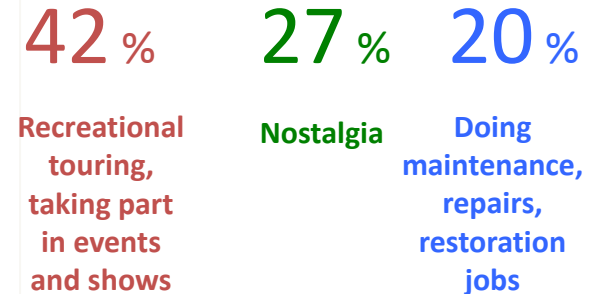
< 1000 km driven in 2013



Use of Historic Vehicles



Reason ownership top-3



Reason ownership bottom-3



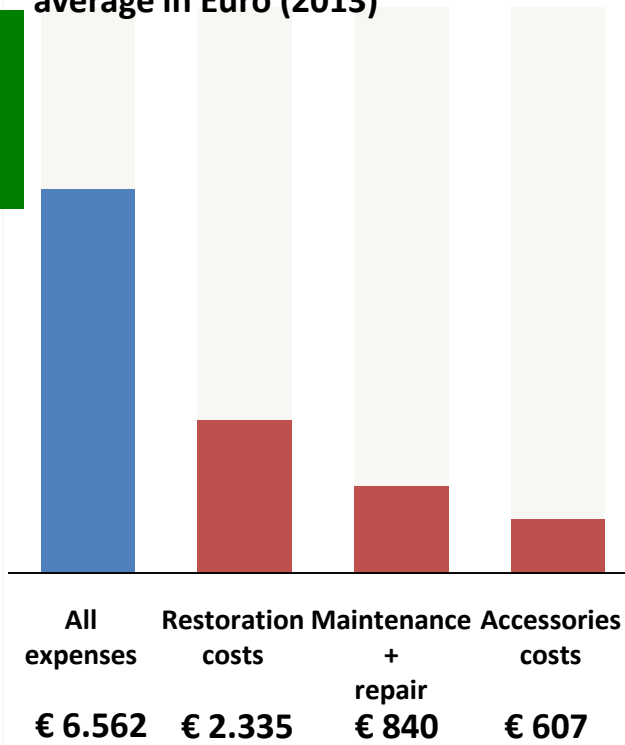
Costs, Maintenance & Repairs historic vehicles



98%

Of the
(service)
costs are
made
within
Europe

Expenses historic vehicles on average in Euro (2013)



- Owners spend on average € 6.562
- Including all the costs relating to ownership, use and interest in historic vehicles in general



1.1

Vehicles per
owner restored at
their own costs

€11.986

Costs for a
restoration
project



Garage/parking

€ 934



Insurance costs

€ 358



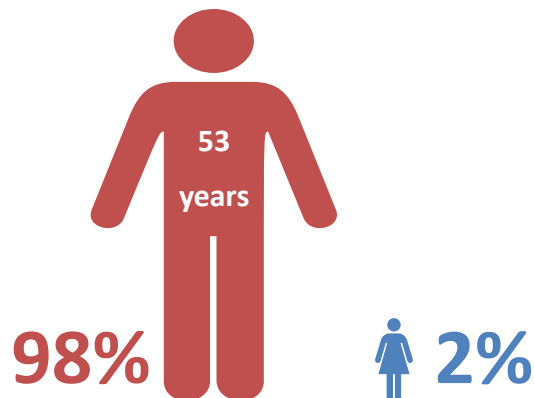
Road taxes

€ 188

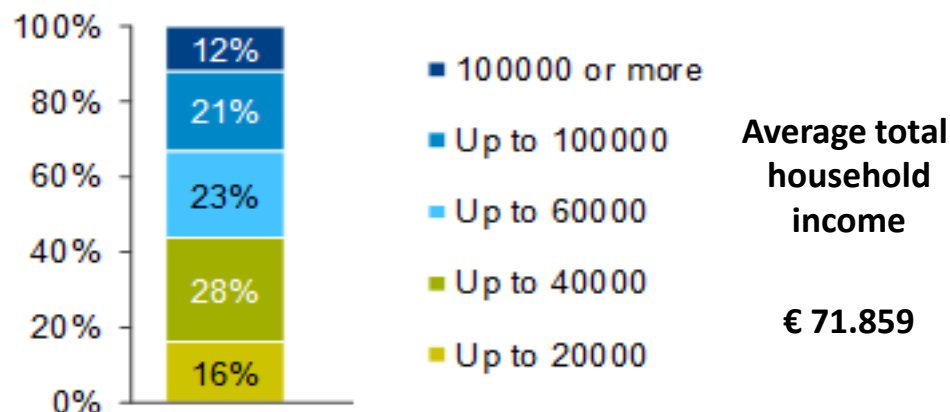
Background information owners



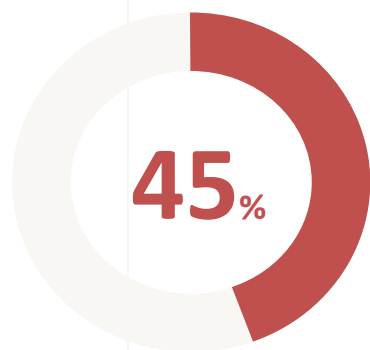
Gender and age



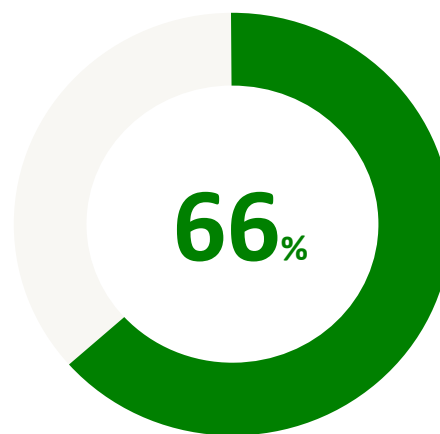
Household income



Historic vehicle club and events



45% is member of one historic vehicle club
36% of 2 or more clubs and 19% isn't member of any club



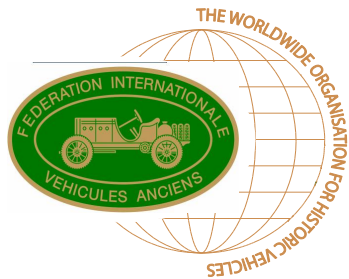
Two thirds visited 3 or more events in 2013

22% visited 1 or 2 events and 11% didn't visit any event in 2013.
On average 5 events were visited

HISTORIC VEHICLES – POLICY INSIGHTS

Professor Bert van Wee, Delft University of Technology

On Numbers, Environment, Congestion
and Road Safety



Historic Vehicles in numbers

- Historic vehicles account for about **1% of total European** vehicle park
- Historic vehicles only account for about **0.25% of total kilometres** driven
- There are circa **1.45 million historic vehicle owners** in the Europe
- **> 110,000 jobs** dedicated to restoration & maintenance of historic vehicles – nearly all in small businesses
- The value of this business alone is well in excess of **€ 5.5 billion euro per year**



Historic Vehicles and the Environment

Pollutants in general:

- Historic vehicle per km emissions of pollutants (PM_{10} , NO_x , CO , VOC) are at least 10x fleet average
- Their share of the vehicle park and the usage profile mean that emissions per vehicle are 2-5 % (PM_{10} , Nox)

Emission of CO_2 :

- Per km a ***little higher*** per historic vehicle, and
- Per car ***significantly lower*** than the average modern vehicle

Life cycle environmental impact:

- Is per historic vehicle ***significantly lower*** than a modern vehicle (15-20% energy for production)



Historic Vehicles and Congestion

Historic vehicles rarely contribute to congestion:

- Historic vehicles only account *for 0.25% of all traffic*
- This use is *predominantly for recreational touring* and taking part in events and shows
- 75% of owners *never use* their historic vehicle for any regular transport purposes
- Some insurance policies *exclude commuting*
- Congested traffic conditions are *not ideal* for older engines!

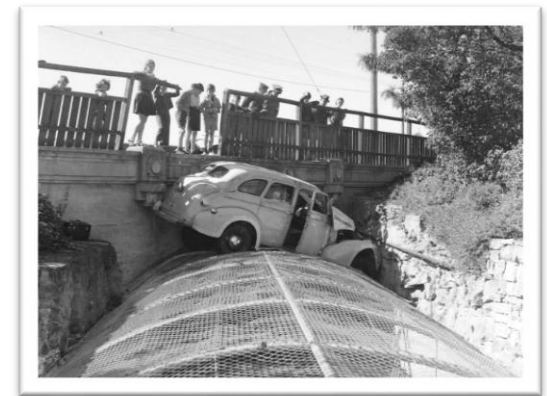


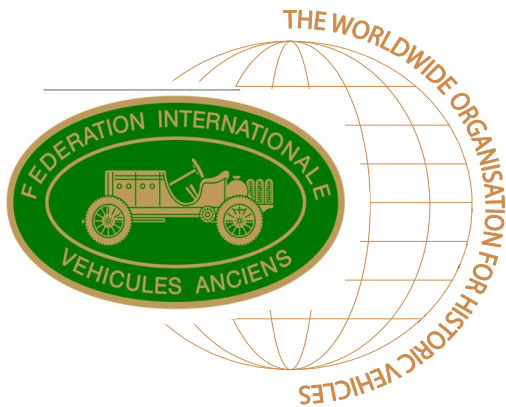
How often do you see a HV in congestion?



Historic Vehicles and Road Safety

- GfK's research finding: **1% involved in accidents**
- Safety features on historic vehicles are below those of modern vehicles (for obvious reasons...)
- **However, a 2010/11 German study found that:**
 - Historic vehicles **8-9 times** less likely to be involved in accidents than all other cars
 - Road accidents caused by drivers of historic vehicles are **below average**
- **Why is this?**
 - Driver behaviour is **predominant factor** in accidents. (Rumar, 1985, Martens, 2014: cause of accidents Driver error: 94%, vehicle 12%)
 - Historic **vehicles rarely used in congestion**, usually only in good (dry) weather conditions
 - Owners take **great care of vehicles** and when driving their vehicles
 - **Proof is provided by the low insurance premiums offered to historic vehicle owners** -





European Members of Parliament meeting
Brussels 14-10-2014

Jos Theuns – Chair of FIVA's Trade & Skills Commission

Business Professionals



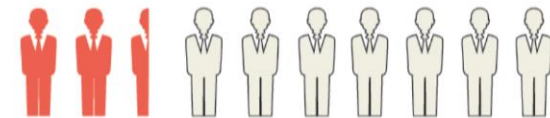
- **Wide experience is available:**
 - Mechanical, hydraulics, electric, carpenter work, upholstery, etc.
- **Increasing age:**
 - Owners: 36,2% are 50 to 60 years
 - Employees (years): 30 – 40: 32%
40 – 50: 33%
- **Concerns about the future** with regards to trainees and ‘young blood’ entering the trade



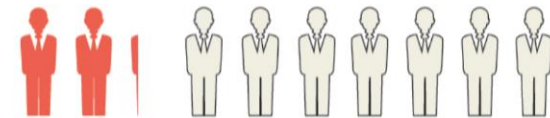
%-share respondents



Technical: 55,7%



Commercial: 24,2%



Others: 20,1%

Based on 1.000 different entities

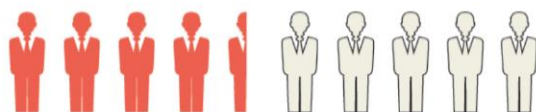


Business Professionals

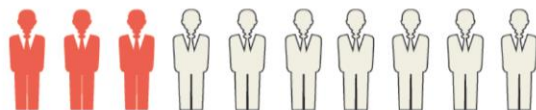
Main concerns:

- Increasing (labour) cost
- Having to comply to regulations and the related investments.

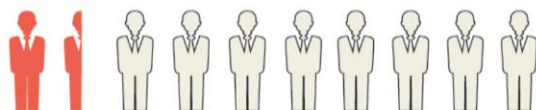
%-share respondents



Cost & regulations: 46,8%



People related: 31,1%



Demand & capital issue: 16,6%

Based on 1.000 different entities

But still optimistic*:



72% expect the same or increased turnover

71% expect the same or increased profitability

Within the next 5 years

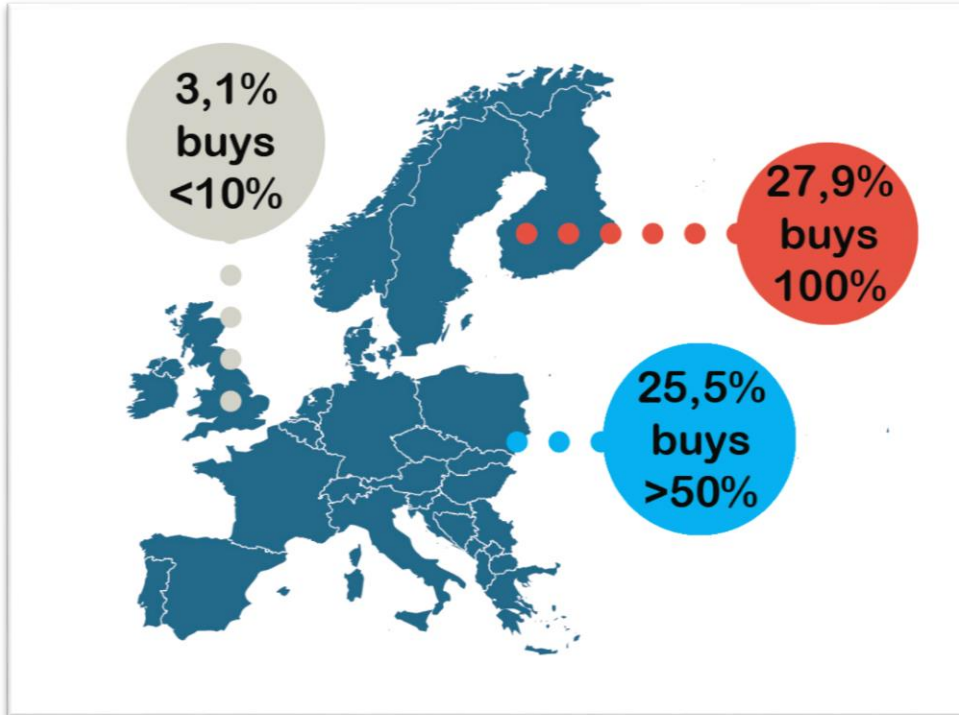
****But, concern about availability of skilled labour and increased regulation***

Business Professionals



A very international business

- The vast majority buys & sells across their national borders



Summary

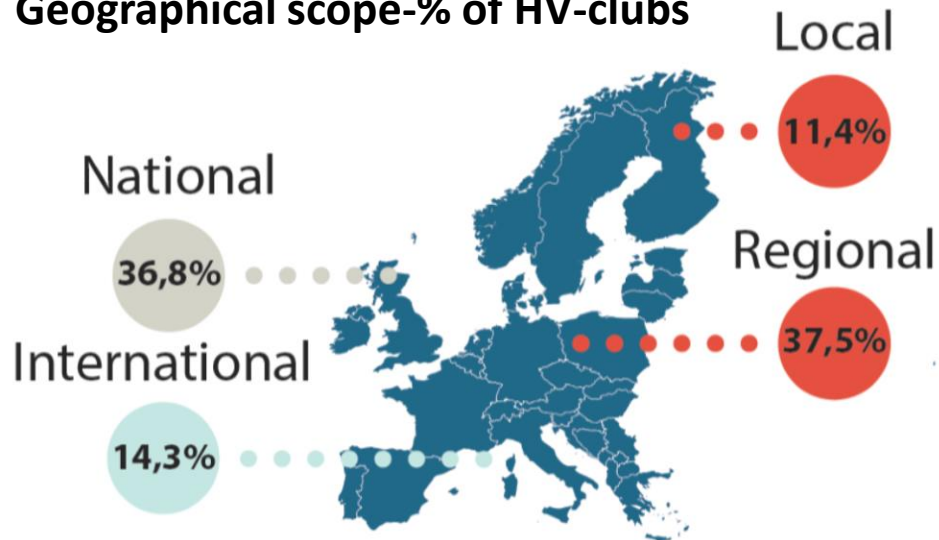
- A healthy, very diverse, business environment
- Very internationally oriented
- Concerns about (future) regulations



Historic Vehicle Clubs



Geographical scope-% of HV-clubs



Club events are important

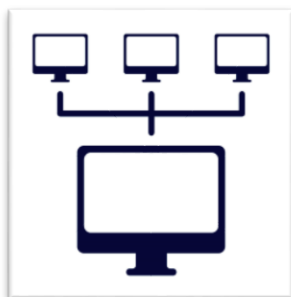
- Socializing amongst each-other
- Exchanging know-how
- Sharing HV culture with general public (incl. children!)



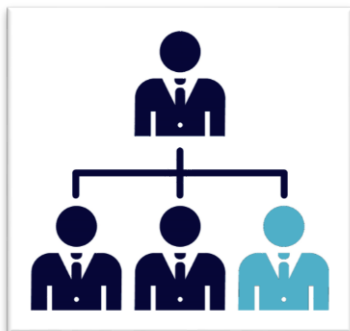
38,1% between 4 and 8/year

Historic Vehicle Clubs

- **Modern media plays** an important and increasing role.
 - Internet & social media make clubs and culture available across borders



- Finding board members is of ***great concern*** for 51% of the clubs



In general

Finding volunteers is increasingly difficult



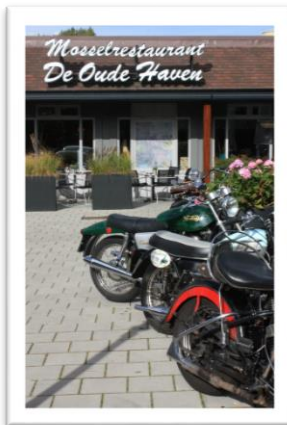
Summary

- Clubs are ***not isolated*** entities, and
- Are an ***economic factor*** for the tourist- and the HV industry
- Internet ***helps to spread*** HV knowledge & heritage

Historic Vehicle Clubs



- **42% of the clubs participate** in charity events:
 - Clubs are not only for 'petrol heads' but are part of a **social society** showing **compassion and culture** at the same time
- The **tourist industry** is one of the **biggest beneficiaries** of club events:
 - 71% organise multi-day events
 - Average spending/night/person: € 123



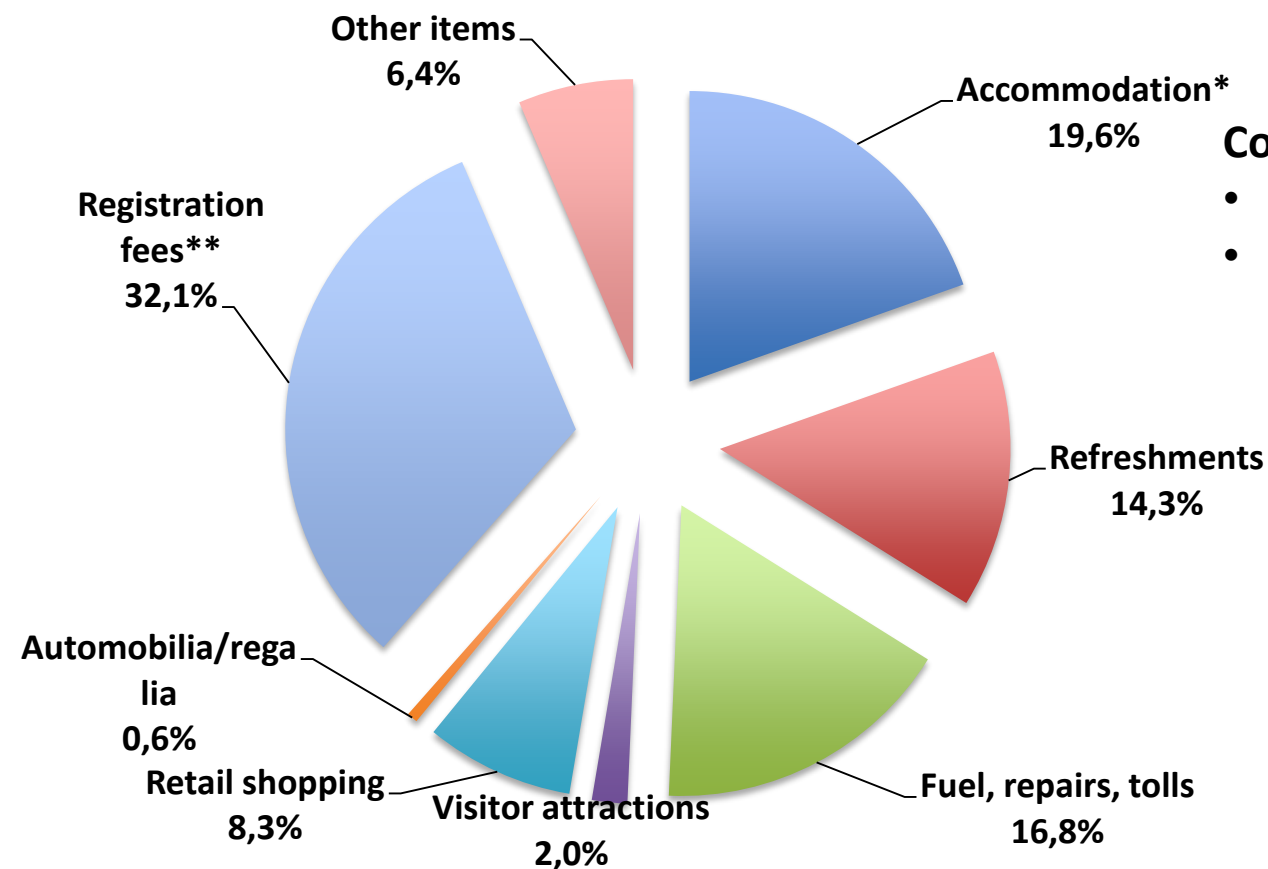
Motor heritage

Sample: Healey-2013 event in Scotland

Historic Vehicle Clubs

Example: Healey Meeting – May 2013, Crieff, Scotland

- 495 people and 249 historic vehicals spent **over £950,000** in this week-long event



Conclusion:

- € 2.450 p/p
- Main beneficiaries: tourist-& food industry **with ±66%**



Study under the guidance of Lord Steel of Aikwood, UK LibDem

**To-and-from event, extended stay, ** Including hotels/meals*

Healey event is considered a high-level event