



THE FIVA 2020/21 SOCIO-ECONOMIC
HISTORIC VEHICLE SURVEY

2020/21

FACT FILE

HISTORIC VEHICLE OWNERS & ENTHUSIASTS

Keeping yesterday's vehicles on today's roads



EUROPE

HEADLINES RESULTS

HISTORIC VEHICLE OWNERS

HISTORIC VEHICLE FLEET



PROTECT, PRESERVE & PROMOTE

Keeping Yesterday's Vehicles on Today's Roads



Welcome to the European Fact File from the **FIVA 2020/21 Socio-Economic Survey**. The aim of FIVA is to Protect, Preserve and Promote the use of historic vehicles on today's roads and this Fact File provides critical insights to support that aim.

The FIVA survey generated nearly 55 000 responses Worldwide and collected nearly 128 000 detailed evaluations of historic vehicles. This summary report outlines the key findings for **Europe** and is based on 49 887 surveys with owners and enthusiasts, and 115 293 evaluations of the historic vehicles they own.

AIM OF THIS FACT FILE

The aim of this Fact File is to provide FIVA stakeholders with a usable overview of survey findings based upon European member countries. This has been presented across across 3 key sections.

We have used survey results to build this report and to help generate relevant and appropriate narratives to support the stated aims of FIVA.

Every care has been taken to do this in a consistent way although survey findings remain reliant on the sampling within each country.

HEADLINES RESULTS

- purchasing power
- distances travelled per annum
- culture and heritage involvement

HISTORIC VEHICLE OWNERS

- owner characteristics (age, income)
- club membership
- youngtimer ownership

HISTORIC VEHICLE FLEET

- historic vehicle characteristics
- usage & frequency patterns
- originality & modification

NOTES TO THE READER

The survey was conducted online between August and November 2020 with the assistance of FIVA member organisations to promote the survey to historic vehicle owners and enthusiasts within their own countries. All members across 74 different countries were encouraged to participate in the process.

The survey was translated into 24 language versions to enable participation from as many owner enthusiasts as possible. Every care has been taken during this process to ensure a good representation within each country, although the reader should review these findings with a critical eye as the profile of vehicle types and makes that are represented is reliant on those owners that participated in the survey.

Survey participants were asked to complete a range of questions relating to themselves and their vehicles. There was an opportunity for participants to stop the survey half way through, or opt not respond to certain questions if they didn't want to. The sample size indicated represents the maximum response to questions, but base sizes will vary and we indicate where these are too small to report. 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.

VEHICLE DEFINITIONS

The FIVA definition of Historic vehicles is based on vehicles that fit the following criteria: *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.*

We acknowledge that this definition does not cover all vehicles that are 30 years or older, but it has been applied as the common denominator for all country results within the FIVA survey.

The FIVA definition of Youngtimer vehicle is as follows: 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.

ABOUT JDA

www.jdaresearch.co.uk

JDA is a research consultancy that works with market research data to develop strategic thinking for industry. We design, manage, execute, analyse and deliver projects across multiple sectors including Automotive, Sport, Manufacturing and Energy.

HEADLINE RESULTS: EUROPE



This Fact File provides the key headline results from the 2020/21 FIVA Socio-Economic Historic Vehicle survey. It is based on 49 887 surveys with owners and enthusiasts across **European** (see spread of countries below), who have provided 115 293 historic vehicle evaluations (see Historic Vehicle Fleet section for more info).

PURCHASING POWER: ANNUAL SPENDING BY OWNERS

The average historic vehicle owner spends an estimated **3,688 €** per annum on the maintenance and running of their vehicle(s), **615 €** on attending historic vehicle events (entry, accommodation, food etc), and a further **334 €** on other items related to their interest in historic vehicles e.g. club membership, magazines etc. This adds to a total expenditure of **4,637 €** per owner, per annum.

DIRECT SPENDING on historic vehicles

Direct spending includes expenditure directly on historic vehicles including insurance, upkeep, repairs, storage, the cost of fuel, servicing and restoration. (note: it is spending across all historic vehicles owned)



The average amount an owner spends per annum directly on their historic vehicle(s)

TOTAL SPENDING on historic vehicles



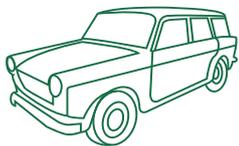
Total owner expenditure per annum on their interest in historic vehicles (per owner)

Total spending includes all direct spending, plus all other related activity including event attendance, overnight stays and other items related to an interest in historic vehicles. It excludes expenditure on vehicles. (note: calculated on a per capita basis).

DISTANCES TRAVELLED PER ANNUM

On average, historic cars travel 1 462 km per annum and historic motorcycles travel 612 km per annum. The average distance that historic vehicle owners say they travel in their historic vehicles is 2 591 km per annum.

CARS



Vehicle distances based on registered vehicles only.



per car, per annum

MOTORCYCLES



per motorcycle, per annum

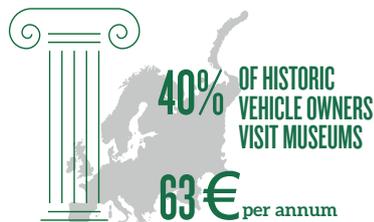
HERITAGE AND CULTURE

4 in 10 owners (40%) visit museums relating to historic vehicles each year, and on average spend 63 € on entrance fees.

In addition, nearly 8 in 10 (78%) attend historic vehicle events (spending around 788 € per annum).

This includes more than half (52%) that stay overnight - on average a total of 4 nights per annum.

MUSEUMS



HISTORIC VEHICLE EVENTS



The FIVA definition of Historic vehicles is based on vehicles that fit the following criteria: 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. Note: Direct spending is across all vehicles owned (on average owners own 3 historic vehicles each in Europe). Total spending is based on a 'per owner' basis to be able to provide an overall spend estimate associated with an interest in historic vehicles. Owner and vehicle distances travelled are derived from different questions. All results presented in this document are based on the survey sample and reflect historic vehicle owners that participated in the research.

The results in this FIVA Fact File primarily reflect the individual survey samples for the following countries: Belgium, Czech Rep, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Slovenia, Spain, Sweden, Turkey, and the United Kingdom. Country samples have been combined and may not be proportional to the number of owners or historic vehicles in each country.

DIRECT SPENDING

ON HISTORIC VEHICLES



3.688 €

PER OWNER, PER ANNUM

Average 'per owner' spend on insurance, upkeep, repairs, storage, fuel, servicing and restoration across all historic vehicles owned.

TOTAL SPEND

ON HISTORIC VEHICLES INTEREST



4.637 €

PER OWNER, PER ANNUM

Includes direct spending, event attendance (ticket), overnight stays (inc food & drink) and other items related to an interest in historic vehicles. Note: excludes expenditure associated with vehicle purchase.

DISTANCES TRAVELLED PER ANNUM

Based on all licensed historic vehicles in the survey



PER ANNUM, PER VEHICLE



CARS

1 462 km



MOTORCYCLES

882 km

BUYING HISTORIC VEHICLES

AVERAGE VALUE OF VEHICLES PURCHASED (2019)



21K €

CARS
56% of car purchases are less than 10K €



5K €

MOTORCYCLES
59% of motorcycle purchases are less than 3K €

VISITING MUSEUMS



40%

of historic vehicle owners visit museums related to their interest.

They spend an average 63€ per annum.

HISTORIC VEHICLES EVENTS



78%

ATTENDED BY 78% OF HISTORIC VEHICLE OWNERS

OVERNIGHT STAYS

52% OF EVENT ATTENDERS STAY OVERNIGHT AT HISTORIC VEHICLE EVENTS



4 NIGHTS

PER ANNUM

HISTORIC VEHICLE OWNERS: EUROPE



The FIVA 2020/21 Socio-Economic survey collected 49 887 surveys from owners and enthusiasts of historic vehicles across Europe. We have used that base to provide an overview on historic vehicle owners. Results for car owners are based on a 39 779 surveys, and for motorcycle owners are based on 9 488 surveys.

HISTORIC VEHICLE OWNERS

More than 9 in 10 owners are male (97%) with an average age of 59. Around 1 in 5 owners (22%) are aged 50 or younger. More than half of owners (54%) are working, most in full time (37%), or self-employed roles (14%), 42% are retired and 4% other. The average household income of a historic vehicle owner is 57.1K € per annum - around half (47%) have an annual household income of 40K € or less. Around 1 in 3 (32%) owners live in an urban city setting compared to 43% that live in a rural location. Around 1 in 4 (26%) live in a town.



The average age of an owner is 59 years

60yrs Car / 59yrs Motorcycle



More than half (54%) owners are working, 42% are retired
Car 54% working / 42% retired
Motorcycle 55% working / 41% retired



Average household income (47% less than 40K €)
Car 58.9K € | Motorcycle 51.4K €



32% of historic vehicle owners live in a urban city setting
Car 32% city vs 43% rural
Motorcycle 31% city vs 43% rural

CLUBS & EVENTS

More than 8 in 10 (81%) owners are members of historic vehicle clubs (on average 1.7 national clubs). Around 1 in 7 owners (15%) that are members of clubs are members of international clubs.



More than 8 in 10 are club members

Car 83% / 79% Motorcycle



Nearly 8 in 10 owners attend historic vehicle events (on average 6 events each year)



The average amount owners spend at events per annum
Car 836 € / Motorcycle 603 €



Fewer than 1 in 30 owners had an accident in their historic vehicle(s) in 2019

Nearly 8 in 10 (78%) owners attend events, on average 6 events each year (6.1 for car owners | 5.8 for motorcycle owners). Owners travel an average of 267 km to be at their favourite event (270 km for car owners | 272 km for motorcycle owners).

Owners say that National (26%) and Club events (24%) are the most enjoyable to attend (car owners 26% and 25%) and motorcycle owners 26% and 22% respectively). More than half (52%) stay overnight at events (on average 4 nights per annum). Of these, most stay in hotels (64%), camping/caravanning accommodation (19%) or in Bed & Breakfast accommodation (14%).

SOCIAL MEDIA USE

Facebook is the most frequently used social media platform (60% car owners | 61% motorcycle owners) with nearly half of historic vehicle owners (45%) using it on a daily basis. YouTube is used by more owners (76%), but less frequently than Facebook (22% use Youtube daily).

YOUNGTIMERS

Around 1 in 3 historic vehicle owners (30%) say they own a youngtimer vehicle (an average of 1.5 youngtimer vehicles). These are mostly passenger cars (80%) and motorcycles (14%). The main marques for youngtimer cars are Mercedes-Benz (11%), BMW (8%), Porsche (5%), Volvo (5%), VW (5%) and Jaguar (5%). The main marques for youngtimer motorcycles are Honda (21%), BMW (14%), Yamaha (14%), Kawasaki (9%) and Suzuki (7%), Triumph GB (6%) and Harley Davidson (6%). The average age of these vehicles is 24 years i.e. manufactured in 1996.

More than 8 in 10 (82%) youngtimer vehicles are licensed for road use and they are driven/ridden further than historic vehicles (on average 3 875 km per annum with Cars driven on average 4 200 km and motorcycles ridden on average 1 943 km). The majority of youngtimer vehicles are described as being in original (74%) or authentic (13%) condition.

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OWNER AGE



59 YRS

AVERAGE AGE OF
A HISTORIC VEHICLE OWNER



60 YRS



59 YRS

AVERAGE HH INCOME



57.1K €

AVERAGE HOUSEHOLD INCOME
HISTORIC VEHICLE OWNERS
(47% < 40K €)

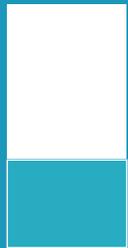


58.9K €



51.4K €

YOUNGTIMER OWNERSHIP



30%

ALSO OWN A YONGTIMER
VEHICLE (1.5 VEHICLES)



Mercedes-Benz,
BMW, Porsche,
Volvo, Jaguar



Honda, BMW,
Yamaha, Kawasaki,
Suzuki

SOCIAL MEDIA



61%

OF OWNERS ARE USING
FACEBOOK
45% At least once a day

76% use YouTube | 22% use Instagram |
16% use Pinterest | 12% use Twitter

HV CLUBS



81%

OF OWNERS BELONG
TO AN HISTORIC
VEHICLE CLUB
90 € SUBSCRIPTION



83%
CAR OWNERS



79%
MOTORCYCLE OWNERS



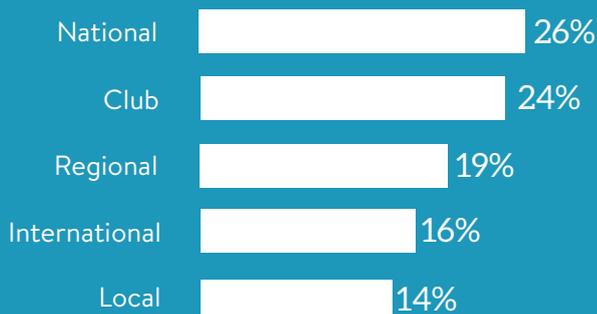
78%

OF OWNERS ATTEND
HISTORIC VEHICLE EVENTS

788 € PER ANNUM ON EVENTS

Includes expenditure on ticket entry, accommodation
and food and drink whilst at the event
(per owner equivalent = 615 €).

TYPES OF EVENTS ATTENDED



FAVOURITE TYPE OF HISTORIC VEHICLE EVENT

ACCIDENTS IN HISTORIC VEHICLES



3%

THE PROPORTION OF HISTORIC VEHICLE
OWNERS THAT HAD AN ACCIDENT IN 2019
Car owners 3% | Motorcycle owners 3%

TYPE OF ACCIDENT

49% small bump | 42% damage to panels | 9% other

HISTORIC VEHICLE FLEET: EUROPE



The FIVA 2020/21 Socio-Economic survey collected 115 293 detailed evaluations of the historic vehicle fleet in Europe (82 093 cars and 20 766 motorcycles). We have used this base of historic vehicles to provide an overview of the historic vehicle fleet across Europe.

THE HISTORIC VEHICLE FLEET

The survey indicates that 71% are cars, 18% are motorcycles and 11% are other types of historic vehicles (mopeds, commercial vehicles, ex-military vehicles etc).

There is a wide mix of marques for historic cars and motorcycles including Citroen, MG, Triumph (GB), Mercedes-Benz, VW, Porsche and Jaguar for cars, and Honda, BMW, BSA, Triumph and Yamaha for motorcycles. The average historic vehicle is 53 years old, having been manufactured in 1967. Historic cars tend to be younger (52 years) than motorcycles (55 years).



Citroen, MG, Triumph and Mercedes-Benz account for an estimated 1 in 4 historic cars



Cars have an average age of 52

HONDA



Honda, BMW and BSA account for an estimated 1 in 4 historic motorcycles



Motorcycles have an average age of 55

HISTORIC VEHICLE VALUES

The average value of an historic vehicle is 22.9K € with cars being considerably more valuable than motorcycles (28.6K € vs 6.6K €). More than half (52%) of historic vehicles are valued to be < 10K €.

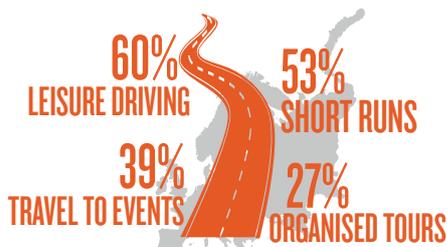
The value of the most common car marques include Citroen (14.9K €), MG (20.4K €), Triumph (18.7K €), Mercedes-Benz (45.1K €), VW (14.3K €), Porsche (60.6K €) and Jaguar (62.7K €). For motorcycles the value of the most common marques include Honda (4K €), BMW (7K €), BSA (5.9K €), Triumph (7.7K €) and Yamaha (3.7K €). Note: these are based on owner estimates and should be treated as indicative of real values.

HISTORIC VEHICLE CONDITION AND USE

More than 8 in 10 (81%) historic vehicles are licensed for road use (cars 83% | motorcycles 74%). On average, historic vehicles travel 1 306 km each year, with cars travelling further than motorcycles (1 462 km compared to 882 km).

On average, historic vehicles are taken out 15 times a year (16 times for cars and 13 times for motorcycles). Historic vehicles are used for a wide combination of reasons. For example, for those that have been used in the last 12 months 60% have been used for leisure driving (63% cars and 56% motorcycles), 53% for short runs (53% cars and 55% motorcycles), 39% to travel to events (44% cars and 26% motorcycles) and 27% for organised tours (29% cars and 18% motorcycles). No historic vehicles had been used as a means of regular daily transport.

More than 8 in 10 (81%) historic vehicles are described as being in an original state compared to 19% that are modified. Around 1 in 3 historic vehicles (31%) are described as original condition, 33% restored, 7% rebuilt, 18% authentic and 11% in need of restoration. For cars - 30% original, 34% restored, 6% rebuilt, 18% authentic and 11% needing restoration. For motorcycles - 33% original, 9% rebuilt, 16% authentic, 31% restored and 10% needing restoration.



Primary reasons for using historic vehicles (all historic vehicles)



the average value of a historic vehicle



historic vehicles described as being in original condition



on average historic vehicles are used 15 times a year

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HISTORIC VEHICLE PROFILE



CARS

71%

Based on survey vehicle sample



MOTORCYCLES

18%

KEY MAKES OF VEHICLE

CARS

Based on vehicle sample

CITROEN	7%
MG	7%
TRIUMPH	7%
MERCEDES-BENZ	6%
VW	5%
PORSCHE	4%
JAGUAR	4%

MOTORCYCLES

Based on vehicle sample

HONDA	11%
BMW	8%
BSA	7%
TRIUMPH	6%
YAMAHA	5%
Harley Davidson / Jawa /	
Kawasaki, Moto Guzzi	3%
Suzuki, Vespa, Norton	each

AVERAGE DISTANCE TRAVELLED BY HISTORIC VEHICLES PER ANNUM



CARS

1 462 Km



MOTORCYCLES

882 Km

Based on all licensed historic vehicles in the survey



1967

AVERAGE YEAR OF MANUFACTURE



1968



1965

OWNERSHIP

YEARS

14 YEARS

AVERAGE NUMBER OF YEARS A HISTORIC VEHICLE HAS BEEN OWNED



14 YEARS



15 YEARS

AVERAGE HISTORIC VEHICLE VALUE

22.9K €



CAR

28.6K €



MOTORCYCLE

6.6K €

(Owner valuations)



81%

OF HISTORIC VEHICLES ARE LICENSED FOR ROAD USE

Based on survey vehicle sample



81% ORIGINAL

More than 8 in 10 historic vehicles are described as 'original'. 19% have been modified.

15 TIMES A YEAR



ON AVERAGE, AN HISTORIC VEHICLE IS TAKEN OUT 15 TIMES A YEAR



(16 times a year)



(13 times a year)



11%

NEED RESTORATION

PROPORTION OF HISTORIC VEHICLES THAT REQUIRE RESTORATION



(11%)



(10%)



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