



Protecting our heritage into the future

THE NEW ZEALAND HISTORIC AND CLASSIC VEHICLE SURVEY 2023
EXECUTIVE SUMMARY FOR FoMC MEMBER CLUBS,
THEIR CLUB MEMBERS, AND THE PUBLIC

Who is the FoMC?

The NZ Federation of Motoring Clubs was founded in 1994 by a group of motoring enthusiasts across 31 clubs with wide ranging interests and all focused on the preservation of their vehicles and the right to use them without undue restrictions. From this beginning, the FoMC has grown substantially, today being an incorporated society with over 140 member clubs covering sectors ranging from vintage and veteran vehicles, classics and modern classics, hot rods and custom vehicles, historic and classic motorcycles, vintage trucks, tractors and other agricultural machinery, military vehicles, and the Motorhome and Caravan Association.

Many aspects of the NZ Federation of Motoring Club activities follow the similar work of the UK Federation of British Historic Vehicle Clubs, particularly the need to provide Government and official agencies with considered and well-presented viewpoints representing the constituent members.

The NZ Historic and Classic Vehicle Survey

Prompted by the pioneering work of the UK Federation and their very well accepted UK Historic Vehicle Survey (five surveys over the last 20 years), the NZ Federation made the decision more than three years ago to undertake such research here in NZ, but those plans were put on hold due to Covid-19 issues and disruptions. In July 2022, the FoMC Executive made the decision to proceed with the Survey, based on similar and proven grounds to the UK Survey, but recognising that the NZ version would be even more challenging, covering so many more sectors than just “historic” vehicles as in the UK Survey. A Project Team comprising Executive members Michael Anderson (Project Leader), Chris Dyer and Garry Jackson was assembled.

Four objectives were defined for the NZ Historic and Classic Vehicle Survey:

1. Identify and quantify social, economic and general data across the full range of historic and classic vehicle sectors and groups here in NZ.
2. Based on the Survey's expected outcomes, share this knowledge widely and publicly to broaden NZ's understanding of the sector, and to enhance public interest and respect for historic and classic vehicle owners.
3. Provide FoMC with a credible platform and strength in all future discussions and submissions with Government, their regulatory authorities and agencies, and other parties.
4. Create impetus for further growth of the FoMC and its member clubs, and to stimulate recognition and strengthening of the heritage values that these vehicles and their owners represent.

The Scale of the 2023 NZ Historic and Classic Vehicle Survey

The Project Brief for the Survey was developed by the Project Team, using the UK Survey (and contacts with the UK Federation) as a guide. The Brief was presented to three leading NZ research companies, with Glasshouse Consulting Ltd (one of NZ's leading research specialists and with extensive automotive experience) being the successful bidder.

The project itself required approximately four months of detailed planning to design the seven separate survey questionnaires covering the seven specific respondent groups that were to be targeted. In-field research took place over six weeks from mid-June to the end of July.

No less than 15,500 individual survey responses were received, some of these extending to more than 50 questions and individual data inputs.

The Survey in full is being communicated in two separate phases: the first phase in September 2023, identified as the Preliminary Report, is the initial "launch" of the headline results and outcomes; the second phase is the "Final Report" (late October 2023), detailing the full results in the NZ Historic and Classic Vehicle Survey Final Report, covering all key questions sector by sector.

NZ Historic and Classic Vehicle Survey Headline Outcomes

The Survey has estimated the total historic and classic sector to be approximately 280,000 vehicles, comprising cars, historic trucks, hot rods, historic and classic motorcycles, vintage tractors, steam engines and other agricultural equipment, and historic military vehicles. This is a conservative estimate drawn from multiple sources, including club records, the interviews with club members, surveys with the public at large, and NZTA registration data (recognising also that not all historic vehicles are registered). This conservative estimate of 280,000 represents 6% of all registered vehicles in NZ. From the Survey it's projected that there are around 200,000 owners, or 3.6% of NZ's population.

Not unexpectedly, the Survey quantified that historic and classic vehicles are used much less frequently than the rest of the NZ vehicle fleet, covering only 3650km per year on average for those vehicles in regular use. Also, it's not unexpected that even though the annual distances are low, NZ's enthusiasts pamper their vehicles to an extent that will surprise non owners. The research across the FoMC members quantified an annual spend of \$9300 per annum covering registration, insurance, fuel and consumables, routine maintenance and servicing and travel to events and other club activities.

As indicated earlier, understanding the total economic footprint of the historic and classic vehicle sectors is one of the overarching objectives of the Survey, and we've determined a total annual spend exceeding \$1 billion across the owners, covering their running expenses, maintenance and servicing, restoration costs, and activity expenses in pursuit of their passions.

But the total economic footprint is more than just the expenses. The Survey drilled into the total personal investment by Federation members into the vehicles they own, together with the public museums and private collections that are such an important part of the total sector. This part of the research totalled \$2.6 billion, a figure that surprised us. And that figure of \$2.6b is very conservative in relation to the total number of historic and classic vehicles in NZ.

Beyond just the money, jobs and employees are also a vital part of the economic footprint. The Survey has estimated conservatively that the associated businesses, specialist trades and services that directly support the historic and classic sectors employ more than 5700 workers nationally in specialist companies and trades. This number excludes the nationwide chain stores who dominate the market for lubricants, car-care and accessories.

Beyond these historic and classic headlines, the NZ Federation of Motoring Clubs also includes the NZ Motorhome and Caravan Association, a founding member of the FoMC. We included the MCA members in this survey, and the research has confirmed the substantial contribution to the NZ economy from this additional sector, with an estimated annual spend of \$633 million on their servicing expenses and travel costs on their journeys. (This figure does not include caravan or motorhome replacements, nor the value of their existing vehicles.)

These three preceding and large expenditure and investment figures add up to \$4.25 billion, quantifying for the first time ever the total economic footprint of the Federation itself and the associated museums and private collections.

Separate analysis and calculations then extended this approach for the whole of the historic and classic vehicle sector, arriving at a staggering estimate of \$11.4 billion, a headline number!

It's important that the Federation's Survey doesn't just focus on the historic and classic vehicle enthusiasts, and the dollars and cents themselves. The Survey itself was designed to also determine and probe the views of the wider New Zealand population, and two particularly surprising statistics emerged from this research. Firstly, no less than 71% of NZ's adult population see historic and classic vehicles as part of our national heritage, and worthy of all the associated support and recognition that this heritage value deserves. Secondly, the historic and classic sector is not seen as just a bygone feature – no less than a quarter of all New Zealanders (26%) indicated that they would actually like to own a historic or classic car today, should the circumstances become available for them!

Conclusion

In conclusion, the NZ Federation of Motoring Clubs believes that these headline outcomes for NZ's first ever historic and classic vehicle research confirm not only that the sectors are in very good heart, but that the social and economic impact that the sectors represent for all of New Zealand exceeds all expectations. In these times of challenge, change and uncertainty, the historic and classic sectors make a substantial contribution to our collective lifestyle, enjoyment and our economy, and the Federation is pleased to have been able to bring this story to life! We'll certainly be using this data in our discussion and advocacy with Government and its agencies on our collective behalf.

For further information or discussion

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