



Protecting our heritage into the future

NZ Historic and Classic Vehicle Survey, Final Report February 2024: Q&A's

Introductory note: these questions and answers have been drafted to provide additional background and understanding to the Survey. They are formatted into five sections: The Survey itself; Vehicle definitions; Possible actions ahead; FoMC in more detail; The future. The notes are intentionally written in an informal, "chatty" style.

The Survey itself

1. **Q.** Why has the Survey been done?
 - A.** After monitoring the market research regularly undertaken over many years by the Federation of Historic Vehicle Clubs in the UK, the Federation here in NZ made the decision in July 2022 to implement a similar, first time ever comprehensive research project here in NZ, covering all the historic and classic sectors represented across the FoMC membership. This decision was driven by our realisation that such research data and insights would be critical as we move ahead into times of challenge and change. It's also significant that this research is a first time ever survey in NZ – it has never been done before.

2. **Q.** What results does FoMC expect from the Survey?
 - A.** We have three broad expectations:
 - an understanding of the headline outcomes that confirm the scale and strength of the historic and classic vehicle sector
 - to have a positive impact on how the NZ public and NZ Government see the sector, and how these vehicles are part of our heritage.
 - an increased awareness of the Federation itself, and the depth of membership across the FoMC clubs

3. **Q.** How was the Survey undertaken? Who paid for it?
 - A.** The NZ Survey itself follows the lead of similar research in the UK by the Federation of British Historic Vehicle Clubs, however, the scope was widened substantially for NZ to align with the NZ Federation's wider representative base. The Survey was treated by FoMC as its largest-ever single project, and a small team from the Executive Committee was appointed to manage it. The NZ Survey was undertaken by Glasshouse Consulting Ltd, one of NZ's leading and accredited research companies after a competitive selection process.
Funding came from the FoMC itself (from reserves held), grants and contributions from a wide range of FoMC member clubs, and from donations from interested and supportive parties.

4. **Q.** What more is in the Survey's "Final Report", compared with the earlier preliminary report late last year?
- A.** The Final Report follows the overall themes of the preliminary report (headline outcomes, social and economic indices and conclusions, and public at large views and opinions high), but in vastly greater detail and with detailed multi page coverage of the research results for each sector including veteran and vintage cars, classic cars (split into three sub groups), historic and classic motorcycles, hot rods and customs, and historic trucks, tractors, agricultural machinery and military vehicles. There's also deeper analysis of owner spending patterns and activities, more detailed insights into public opinion and interests, and much more. The Final Report also includes research results across the membership of the NZ motorhome and caravan sector (the MCA is a long standing and significant member of the Federation), although this data is not included in the national totals given the direct focus of the Survey being on historic and classic sectors.
5. **Q.** How did you research the Private Collections?
- A.** Interesting question!. This was a challenge for us, given their importance in the overall and total picture that the Survey was pursuing, but also the privacy considerations that had to be met. We identified a large number of private collections of varying size through local knowledge across the FoMC project team. Our Agency determined a suitable survey interview, and we then approached the owners within strict security and privacy protocols to obtain high-level data in line with the overall objectives of the Survey. From this work our Agency was able to develop reliable, comprehensive data to incorporate in the overall research findings.
6. **Q.** What aspects of the Survey surprised the Federation?
- A.** There are probably a number of them. The actual response rates to the online survey questionnaires, and the depth of comments received certainly far exceeded the expectations of our research company. With regard to some of the figures, we really didn't know what would come forward. The UK Survey had demonstrated that the economic footprint was likely to be a surprise, and this is certainly true here in our NZ results. Perhaps one of the most "pleasing" results (and unexpected) was the public's very strong view that historic and classic vehicles need to be considered as an important part of our heritage. That's great support, and it will trigger further consideration and action from the Federation as we pursue new initiatives in the fields of history and heritage.

7. **Q.** Does the Federation have any influence over the Survey results?
- A. The Survey, including its development, execution, resultant analysis and reporting has been done on best practice principles through one of NZ's leading accredited research agencies, appointed for the project following a competitive bidding process. The results themselves all stem from the scale and depth of the inputs across 15,500 respondents, a figure that exceeded the agency's expectations. Within this entire process, FoMC and Glasshouse Consulting Ltd (FoMC's appointed research agency) fully complied with the overarching privacy and data security imperatives that govern such research. The FoMC itself has no access to respondent inputs or data held by the research company. It is also important to note that the 150 page Final Report is solely the Agency's report, with no editorial direction or prescriptions from FoMC.
8. **Q.** How is privacy and confidentiality managed within the Survey?
- A. The Federation Survey, its development, execution, and resultant analysis and reporting has been done on past practice principles through one of NZ's leading accredited research agencies, selected from a competitive bidding process. The results themselves, including the headline outcomes, all stem from the scale and depth of the inputs across 15,500 respondents, a figure that exceeded the Agency's expectations. Within this entire process, FoMC totally respects and complies with the over-arching privacy and security principles and legislation covering such research. The FoMC itself has absolutely no access in any way to the privacy of individual inputs or data aggregated by the research company.

Vehicle Definitions

9. **Q.** What is a "Historic Vehicle"?
- A. In simple terms, "Historic Vehicles" in this Survey comprise all "veteran vehicles" (built 1918 or earlier), "vintage vehicles" (built 1919 to 1931), and "post vintage" (1932 to 1945), whether they be cars, motorcycles, trucks, tractors and agricultural machinery, or military vehicles. In other references (e.g. the UK Survey), the term "Historic" is also be applied to all notable vehicles older than 30 years – the NZ Survey has used a tighter definition, more closely aligned to the membership profiles of our member clubs.
10. **Q.** What is a "Classic Vehicle"?
- A. "Classic vehicles" in the widest sense of this Survey includes notable and collectible vehicles spanning three distinct periods; 1945 to 1969 ("post war classics"), 1970 to 1999 ("modern classics"), and Post 2000 ("recent and current classics").
- These terminologies and applicability by year and by vehicle are often the subject of debate between enthusiasts and stakeholders, with varying views and positions. We believe that for the wider purposes of this Survey, and the responsibility we have to the diverse membership of the FoMC, our approach (Q10 and Q11) adheres to and respects both the middle ground and the more passionate views in this debate!

Possible Actions Ahead

11. Q. What will the Federation be doing, either new or differently, from the Survey?

A. The Federation is totally committed to three broad objectives for our future, and the Survey will play an integral role in each of them:

- we'll increase our efforts to protect and promote the heritage values of its members' vehicles.
- we want to broaden NZ's understanding and appreciation of our automotive history and the enjoyment that these vehicles bring to so many.
- we'll be increasing our advocacy with Government and others based on research-proven social and economic contribution that historic and classic vehicle owners, enthusiasts, businesses and club members make.

12. Q. Will the Federation be running the Survey again at some time?

A. Whilst there's no specific plan to do so as of today, FoMC has monitored the success of subsequent research in the UK, where their Survey is repeated regularly, to monitor trends over time, and to measure new developments and influences. We see great value in doing the same here in NZ, subject to budgets and funding. This is a discussion that the FoMC will be having in more detail in the year ahead.

The Federation of Motoring Clubs itself

13. Q. Who is the New Zealand Federation of Motoring Clubs?

A. The NZ Federation of Motoring Clubs is an incorporated society founded in 1994 by a small group of clubs interested in the preservation of their vehicles and the right to use them on public roads without undue restrictions. Today the Federation comprises over 140 member clubs covering veteran, vintage and classic cars, historic and classic motorcycles, hot rods and customs, vintage trucks and tractors, veteran military equipment, and motorhomes and caravans. Within these individual clubs, the Federation is proud to have the Vintage Car Club of NZ, the NZ Hot Rod Association and the Motorhome and Caravan Association as part of the total FoMC "team".

The Federation is one of the very few voices recognised by Government and its agencies for its overarching and effective representation across all of the FoMC's member sectors.

The Federation is totally committed to three objectives: protecting and promoting the heritage values of its member vehicles; extending NZ's understanding and appreciation of our automotive history and the enjoyment that these vehicles bring to so many; advocacy for the social and economic contribution made by the tens of thousands of owners and enthusiasts that the Federation represents.

14. Q. How does the Federation relate to the total sector of historic and classic vehicles?

A. By way of its wide-ranging span of over 140 diverse motoring clubs, the Federation is the only organisation that truly incorporates and represents the diversity of the historic and classic vehicle sector, from the Ford Model T Club to the Ferrari Owners Club, or to put it in an alphabetical sense, from the All American Truck Club to the Zephyr/Zodiac Clubs, and just about every model in between. Not only does the FoMC have member clubs dedicated to most of the iconic historic and classic vehicle brands, it also has the advantage of direct membership by the Vintage Car Club of New Zealand (37 national branches across NZ) and the NZ Hot Rod Association, who in turn have 105 subsidiary clubs across NZ. And over and above these well-known vehicle types and brands, the FoMC also has no less than 31 clubs covering special sectors such as historic trucks, tractors and machinery, historic and classic motorcycles, and military vehicles.

15. Q. What does the Federation actually do?

A. Much of the Federation's efforts have concentrated on representation of its member clubs in major policy issues with Government and Government agencies, via submissions and direct contact as appropriate. One of the subjects presently being advocated is the possible extension of NZ's six month WOF inspection frequency to 12 months for members' vehicles, recognising the higher standards of servicing and maintenance and their low annual usage.

From 2022-2023, the Federation's role has expanded substantially, firstly with the design and implementation of the NZ Historic and Classic Vehicle Survey, and secondly with planning and provision of assistance and guidance for our large number of member clubs regarding the impending reforms for incorporated societies in updated Government legislation replacing the Incorporated Societies Act 1908, and leading to changes in Clubs' constitutions over a period to April 2026.

16. Q. How many people does the Federation represent?

A. As can be seen on our website, our total membership figure is 140,000. And as large as that number is, we know it's not quite the actual total. For many of our vehicles, and their household owners, there might be a single name on the registration papers, but two people in the household rightfully co-owning the vehicle. Some of our member clubs (including a number of our largest clubs) count both such partners as "members". In other clubs, the same situation might be considered and recorded as a single "membership". So the precise answer to the question is "more than 140,000!" An additional factor is that many enthusiasts are members of more than one club, reflecting their wide-ranging interests and "personas".

17. Q. What is the breadth of vehicle types across the FoMC member clubs?

A. Of our present total of over 140 member clubs, the analysis shows:

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|---|-----------|
| - Early Historic - vintage and veteran (pre 1945) | 14 clubs* |
| - Historic and Classic (post 1945, and including modern classics) | 95 clubs |
| - Vintage trucks, tractors and machinery | 16 clubs |
| - Historic and classic motorcycles | 14 clubs |
| - Hot rod and customs | 2 clubs** |
| - 4x4 | 2 clubs |
| - Military vehicles | 1 club |
| - Motorhome and caravan (NZ MCA) | 1 club |

*One of these clubs is the Vintage Car Club of NZ, including all 37 of its regional branches

**One of these clubs is the NZ Hot Rod Association, who represent 109 separate local clubs

The Future

18. Q. Do Historic and Classic cars really have a future?

A. Very much so, and the Federation believes that this Survey itself will be an important contributing factor, particularly because of the increased profile it will create and the scale of the social and economic contribution that the Survey has quantified for the first time ever. These points will be further strengthened with the research data confirming the strong support and emotional connections that the wider NZ population have with historic and classic vehicles. Further, there are clear signals internationally that historic and classic vehicles are becoming increasingly recognised as part of a wider view of heritage and culture, from the work being done by the International Federation for Historic Vehicles (FIVA) and the Hagerty initiatives in the USA that are advocating for historic vehicles to be considered as "Moving Monuments". The future looks great!

19. Q. What's the future for EV's and hybrids within the Federation? Are they classics?

A. Great and topical question! Apart from some pioneering early electric models, they're probably not "classics" as such, so it's hard to see them being specifically included in a "Historic and Classic Vehicles" Survey in the foreseeable future. But that's not to say that they couldn't be included in the wider scope of the Federation itself in some way. After all, they are an integral part of current motoring culture. A new development already apparent is "new technology members" joining existing clubs, such as a Mustang Mach E owner joining their local Mustang Owners Club and MG hybrid and EV owners joining the NZ MG clubs. Could we see a "Tesla Owners Club" being established and applying for FoMC membership in the future? Who knows? We live in interesting times!

Additional Questions

20. Q. The economic footprint headline of \$16.5 billion is a very big number. What's included, and how was it derived?

A. The total \$ footprint of \$16.5 billion certainly gets the attention of all of us! There are four primary components that underpin the \$16.5 billion headline:

- The value of the 44225 historic and classic vehicles owned by the FoMC members, together with the value of the vehicles held in museums and private collections
- The value of the balance of the total of 369600 historic and classic vehicles throughout NZ, derived by the Agency from NZTA data and other sources
- The well researched figure of annual expenses per vehicle across FoMC members (garaging, storage, insurance, servicing and maintenance, presentation costs, fuel, travel and event expenses, and restoration and customisation as applicable)
- Annual expenses across the balance of the historic and classic sector beyond FoMC, derived using the FoMC data, together with data from the public at large questionnaire which detailed NZ household expenses attending events, museums and so on.

21. Q Why is the total economic footprint figure of \$16.5 Billion greater than the \$11.5 Billion used in the Preliminary Report?

A. There are two specific (but inter-related) reasons:

- Because the Preliminary Report was on early data, ahead of the full analysis of vast quantities of supporting analysis and information, we deliberately took a conservative approach, including a number of data assumptions that later proved to be understated.
- In the time available to our lead researcher between the Preliminary and Final Reports, deeper analysis of two key metrics resulted in a substantial increase in the overall footprint figure: firstly, the total NZ "fleet" of Historic and Classic vehicles was increased (from 279000 to 369000) based previously unavailable internal NZTA registration analysis; secondly there were updated figures on a number of metrics, particularly the average value across all historic and classic cars, now \$52500 versus an earlier more conservative figure of \$45000. There were also other smaller adjustments but these are the two primary reasons.

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