

NZ Federation of

F M C

Motoring Clubs Inc

Protecting our heritage into the future



New Zealand Historic and Classic Vehicle Survey

Preliminary Report - September 2023

Who is the FoMC?

The New Zealand Federation of Motoring Clubs Inc was 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's 140+ member clubs include veteran, vintage and classic cars, historic and classic motorcycles, the NZ Hot Rod Association, vintage trucks and tractors, veteran military equipment, and motorhomes and caravans. 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 members' vehicles
- To broaden NZ's understanding and appreciation of our automotive history and the enjoyment that these vehicles bring to so many
- To advocate for the social and economic contribution made by the owners, businesses and enthusiasts that the Federation represents

www.fomc.nz

Email: secretary@fomc.nz



How are "Historic and Classic Vehicles" defined?

For the purposes of the NZ Historic and Classic Vehicle Survey, the Federation has been guided by both the international definition of "Historic Vehicles" and by the composition of the Federation's member clubs.

Accordingly "Historic Vehicles" in this Survey comprise all "veteran vehicles" (built 1918 or earlier) and "vintage vehicles" (built 1919 to 1945, although sometimes "post vintage" applies to 1932 to 1945), whether they be cars, motorcycles, trucks, tractors and agricultural machinery, or military vehicles. "Classic vehicles" in the widest sense include notable and collectible vehicles spanning two periods, 1945 - 1993 (sometimes included with the term "historic") and post 1993 (often referred to as "modern classics").

Almost all the research and data in this Survey is focused on just Historic and Classic vehicles as per the foregoing. The one additional inclusion is the economic contribution of the recreational sector, recognising the importance of the motorhome and caravan sector within the Federation's membership and footprint, and their contribution to the NZ economy. These MCA references are clearly identified in this report.

Introducing Glasshouse Consulting

A full-service award-winning boutique consultancy

- Specialising in insight solutions with over a decade in supporting clients with customised research solution
- Client facing team of Senior Consultants partnering with expertise in other areas as required eg. statistics and modelling, qualitative, design
- Smart people, smart technology, smart insights



Headline Outcomes

279,200

Estimated total number of historic and classic vehicles in NZ

\$11.4B

Estimated total economic footprint of all historic and classic vehicles in NZ

44,225

Total historic and classic vehicles in FoMC Membership

\$2.6B

Estimated total vehicle investment by FoMC members, museums and collections

3,650km

Average annual distance travelled per annum, historic and classic vehicles

\$9,302

Average annual spend per historic & classic car: insurance, running costs, servicing etc

\$1.03B

Estimated total annual spend across historic and classic sectors

5,700

Estimated total jobs directly supported across all sectors

\$660M

Total annual spend of the FoMC Motorhome and Caravan sector (servicing and travel)

\$43,670

Average value per vehicle for all historic and classic cars (FoMC members)

26%

Proportion of NZ population who would love to own an historic or classic vehicle

71%

Proportion of NZ population who see historic and classic vehicles as part of NZ's heritage

80% +

of FoMC clubs report growing or stable membership and vehicle numbers

15,500

Total number of surveys conducted

Introduction



The NZ Historic and Classic Vehicle Survey is a very significant first-ever research project by the NZ Federation of Motoring Clubs Inc.

We have followed closely the pathway and successes of the five similar research surveys commissioned of the last twenty years or longer by the Federation of British Historic Vehicle Clubs, whilst simultaneously recognising the overriding challenges and complications of replicating such research in NZ, partly due to our much smaller scale, and also due to the far wider sector representation here in NZ, thereby adding to the task.

The FoMC moved the possibility of a NZ Survey onto the drawing board in 2022, once NZ's Covid recovery was underway and restrictions were diminishing. A comprehensive scoping document was developed in Q3 2022, and this flowed into a brief to three of NZ's leading research agencies, and the appointment of Glasshouse Consulting Ltd end 2022.

Early work on Survey design and execution was paused due to the North Island flooding events and Cyclone Gabrielle after-effects, with field work finally underway in June, and completed by end July. This was a mammoth task, given the complexities of the market and the Federation's wide span of sectors requiring seven separate survey questionnaires and 15,500 responses in total.

You'll see the scale of the results and outcomes on the following pages of this Preliminary Report. I firmly believe that the Survey will be the gateway for a new future for the Federation, and the historic and classic vehicle sector in NZ. For the first time we have a wide range of quantitative data, and understandings and conclusions with statistical validity. The research also confirms that we have clear and widespread public interest and support. In these times of challenge and change we need to be more focused and driven than ever to showcase our automotive passions. The Survey couldn't be better timed!

As I conclude these introductory words, it's pertinent and important for me to acknowledge and recognise the wonderful efforts and achievements of the FoMC Survey Project Team of Michael Anderson (Project Lead) and Chris Dyer, and the expertise and total commitment of Glasshouse Consulting Ltd, and their lead researcher Duncan Stuart. Our grateful thanks to all.

Enjoy, and "absorb", the findings and learnings in this Preliminary Report and keep an eye out for the final full report due for publication planned for late October.

Very best wishes
Garry Jackson
President
September 2023



Our Culture on Wheels

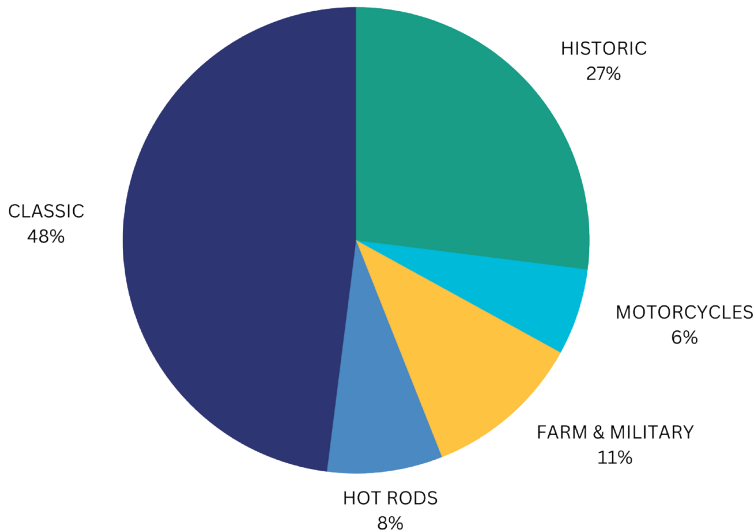
279,200

Estimated total number of historic and classic vehicles in New Zealand

6%

Historic and classic vehicles as a percentage of total vehicles in New Zealand

The mix of historic and classic vehicles (based on FoMC Data)



The NZ Federation of Motoring Clubs is a substantial part of the Historic and Classic vehicle market



44,225 vehicles (historics and classics)



27,294 owners



1.6 vehicles per owner

What do we spend on our passion?



\$9,302

Spend per vehicle year per vehicle (cars) Includes garaging, insurance, club memberships, other "static" costs, consumables including fuel, polish and presentation costs, maintenance, servicing, repairs



\$4,685

Restoration /customisation costs (average annual cost per car)



\$7,102

Spend per year per Historic Tractor, Truck and Machinery (incl restoration)



\$1,407

Spend per year per Historic and Classic Motorcycle



3,650kms

Average annual distance travelled per year, per historic and classic vehicle

The Historic and Classic sector drives economic value to New Zealand

\$11.4B

Total estimated \$ footprint of the entire Historic and Classic vehicle sector in NZ including ownership investment and all expenditure

\$1.03B

Estimated annual total expenditure on historic and classic vehicles across the sector (but not including the investment in existing or additional vehicles)



\$4.2B

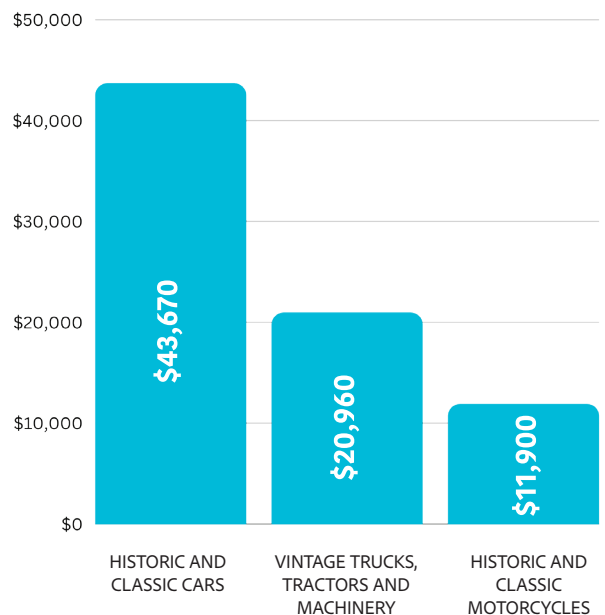
Total "Economic Footprint" of NZ FoMC and its wider associates (museums and private collections), and including the MCA



\$633M

Total annual expenditure of the Motorhome and Caravan sector of FoMC (servicing and travel only, excludes capital costs and new purchases)

Average value per vehicle (across FoMC members)



What does New Zealand think?



Historic and classic vehicles should be preserved for people to see and enjoy in the future

76% agreed

I relate to many historic or classic cars or motorcycles because, growing up, I always wanted one. Some cars have stayed on my wish list for years.

31% agreed

For me, what makes a classic car is mostly about the way they reflect a different age. The engineering and history of the vehicle shows us the way things used to be.

71% agreed

For me, what makes a classic car is mostly about the emotion – the style and the way it reflects and reminds us of our dreams and aspirations

55% agreed

Historic and classic vehicles are part of the country's heritage, and it is important to maintain them.

71% agreed

When asked "How tempted would you be?"

26%

The percentage of New Zealanders who would love to own the historic or classic vehicle of their choice if circumstances allowed.

Temptation was widely spread across a wide range of possible historic and classic vehicle types.

Only 22% showed no interest at all



Methodology and Next Steps

Scope of this Report

As titled, this is very much a Preliminary Report of the NZ Historic and Classic Vehicle Survey undertaken by the NZ Federation of Motoring Clubs, highlighting selected early and high-level outcomes from the research. Accordingly this report should be accepted as “indicative-only”, until the complete and detailed Final Report is published (expected late October).

Please note that the research provided a mix of data, some of it allowing us to project outcomes across the whole of the sector nationally, and some more specific to just the Federation.

The content of this Preliminary Report has been chosen to give everyone a “snap-shot” of overall conclusions and points of interest arising from the initial analysis of the extensive data captured in the Survey’s research. As such this Preliminary Report does not, and does not attempt to, provide a complete and/or final presentation of the results of the NZ Historic and Classic Vehicle Survey.



Methodology

The NZ Historic and Classic Vehicle Survey comprised 7 separate survey questionnaires (FoMC Club Executive Committees, Clubs’ individual members, associated trade and service businesses, public automotive museums, private collections, the MCA sector, and the general public). All surveys were online, apart from personal interviews with museums and private collections.

At total of 15,500 survey questionnaires were completed. Field work commenced mid June 2023, and concluded end of July.

The results and highlights included in this Preliminary Report have been selected from Glasshouse Consulting’s initial working report to the FoMC Survey working team.

Survey design, execution, analysis and interpretations have been led by Duncan Stuart of Kudos Organisational Dynamics Ltd, working with Glasshouse Consulting. Duncan is a Quantitative Researcher with a Qualitative background. He has worked in research since 1991 including projects in government, workplace safety, social research (Housing, Welfare,) and public transport. Duncan’s core strength is his confident use of advanced and exploratory analytic techniques.

He works beyond the core platform of SPSS and includes segmentation mapping, Monte-Carlo simulation, text-analysis as well as Neural Networks (machine learning). His access to a breadth of analytical tools empowers him to extract more insight from survey data to reveal deeper answers and a stronger sense of cause and effect in the respondent mindset.

Colin Yee is Founder and Managing Director of Glasshouse Consulting and has overseen the project entirely. Colin has over 30 years in the market research industry and has been the Account Director for the Motor Industry Association Syndicated research into new car buyers since 1989. He has been Chairman of AMRO (Association of Market Research Organisations), Managing Director of Research International and is a Fellow of the Research Association of New Zealand. Colin has recently won two Platinum Research Association awards for his strategic partnership with NZTA/Waka Kotahi over the last 25 years.



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For further information relating to the survey: <https://fomc.nz/NZHCVS>
For survey communication: <https://fomc.nz/NZHCVS-contact>
For email communication directly with the President: president@fomc.nz

Photo credits: Greg Lokes, Ian Goldingham, The Vintage Car Club NZ, NZ Hot Rod Association
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Survey credit: Federation of British Historic Vehicle Clubs