

NZ Federation of
FoMC
Motoring Clubs Inc

Protecting our heritage into the future



New Zealand Historic and Classic Vehicle Survey

Summary Report - February 2024

(for the full 150 page Final Report, go to the FoMC website - fomc.nz)

President's Foreword

Welcome to the Summary Report of the NZ Historic and Classic Vehicle Survey, a very significant first ever research project by the NZ Federation of Motoring Clubs Inc.

This Summary Report, and the associated 149-page Final Report, are a major update and extension of the early snapshot of the research results that we presented in September last year in our preliminary report. Our Agency has since spent considerable time drilling deeper into the data from the extensive in-field surveys and interviews, bringing together comprehensive and fascinating insights into all aspects of the historic and classic vehicle community, sector by sector.

The following pages in this Summary document follow the format of the Final Report (insert link), illustrating the breadth and depth of the membership sectors within the Federation itself. Each page gives a high-level outline of the findings, key facts and conclusions from the Research, across every sector from Veteran and Vintage Cars to Vintage Agricultural Machinery and Military Vehicles, and a further five sectors in between.

The Summary Report goes further than just the vehicle sectors and contains wide ranging insights into the very supportive views of the NZ public at large, the huge contribution of our museums and private collections, and the growing recognition and importance of our historic vehicles as part of NZ's heritage and history ("moving monuments").

From the reactions and response we received to our Preliminary Report and data back in September, and our early conservative estimate then of an \$11.4 Billion economic footprint for the historic and classic sector, we know that this Final Report will generate even greater surprise, with an total footprint of \$16.5 Billion headlining the total sector economic summary in this Summary Report.

Why is all of this important? Firstly, it's because this is a first time ever research project. The historic and classic vehicle sector has never been researched before, let alone to this level of depth and insight (I think those of us as owners and enthusiasts have always "guessed" that the sector was bigger than expected, but we've never had the data to prove it). Secondly, it's important because we live in times of change, and the pace of that change seems to be accelerating. So many aspects of our traditional way of life are under challenge, for all kinds of reasons.

This FoMC research strengthens our hand as the Federation, and as clubs, regarding our interaction with Government, Councils, and public at large, whether that be pushing our cause for less restrictions on our owners (eg extending current 6 month WOFs to 12 months on vehicles owned by members of FoMC clubs), telling the story and pushing the case that our historic vehicles are "moving monuments" and an integral part of NZ's heritage stories, or the sheer economic weight and contribution we bring with our \$16.5B footprint.

In bringing all this together, I want to acknowledge our FoMC Project Director Michael Anderson, and the work of our agency Glasshouse Consulting Ltd, and lead researcher Duncan Stuart. Our thanks to you all. So from me, welcome to the Summary Report of the NZ Historic and Classic Vehicle Survey 2023. I hope you enjoy reading it, and absorbing the intriguing insights, facts and figures that bring our collective automotive passions to life and quantify our worth to our country!

Very best wishes

Garry Jackson
President, NZ Federation of Motoring Clubs Inc



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

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Final Report

Headline Outcomes

New Zealand Historic and Classic Vehicle Survey

369,600

Estimated total number of historic
and classic vehicles in NZ

\$16.5B

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

3,700km

Average annual distance travelled per
annum, historic and classic vehicles

\$6,355

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

\$1.53B

Estimated total annual spend
across historic and classic sectors

5,200

Estimated total jobs directly
supported across all sectors

\$468M

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

\$52,500

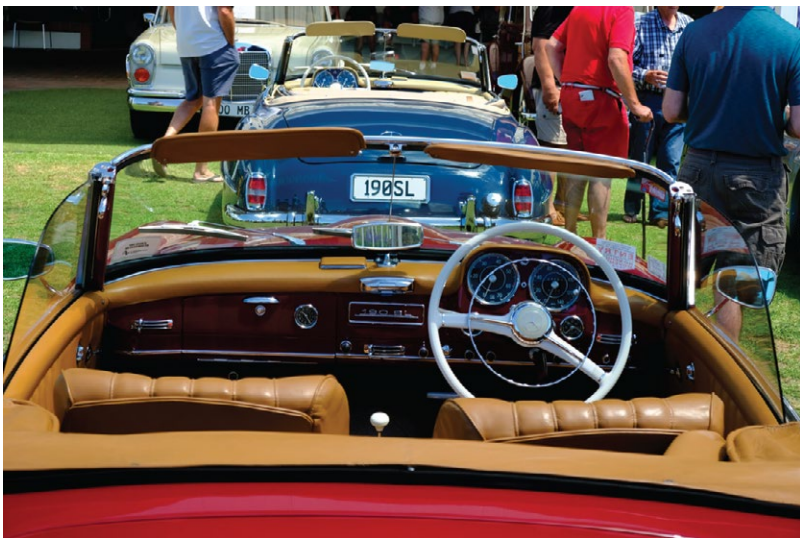
Average value per vehicle for all historic
and classic cars (FoMC members)

26%

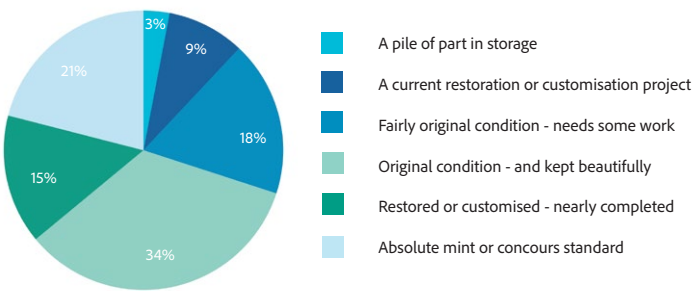
Proportion of NZ population who would love
to own an historic or classic vehicle

71%

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



The status of the vehicles surveyed



What percentage have undertaken these club activities at least 3 times in the past 12 months.	Veteran & Vintage
'Gone for a spin' or leisure run in a historic or classic vehicle owned either by yourself or a friend or family member	75%
Taken part in a parade – part of a wider celebration – e.g. Christmas parade	14%
Taken part in a meet-up, short-run outing or event organised by my club	58%
Taken part in a long-run outing or event organised by my club (e.g. over a weekend or grand tour)	18%
Entered an event dedicated to historic classic or custom vehicles E.g. concours, rally, beach hop etc	20%

Historic car owners spend over \$17,000 to run their fleet each year. This includes insurance, storage, restoration, repairs, and petrol – everything – across their entire 'fleet'. This comes to approximately \$4,800 per vehicle per annum. Note, the figures below express spend in the last 12 months by historic vehicle owners – i.e. spend across all their vehicles.

Annual total spend on insurance, registration, membership	Annual total spend on storage or garaging	Annual total spend on consumables, oil, petrol, polish	Annual total spend on maintenance, repairs	Annual total spend on restoration spare parts, paint, customisation	Annual total spend
\$3,441	\$1,354	\$2,329	\$3,978	\$6,066	\$17,168

Owners of veteran and vintage cars tend to be older than most car collectors.

It is clear from their comments (a few of which we have included) that they are strongly motivated by their parents' involvement in cars – for example a dad who taught the current owner how to fix and repair a Model A. There is also a lively appreciation of the simplicity and genius of these early cars as well as enjoyment garnered from the ability of these cars (some approaching 100 years of age) to turn heads and win smiles. There is a motivation to preserve these cars.

"Have grown up around model T fords It is a relaxing and enjoyable hobby to find, source and restore vehicles Being able travel around the country in them on organised club rallies as well as when on holiday touring by ourselves."

"They both have History that we are fast losing - and with climate control coming into force it would be devastating to lose the privilege of vintage, veteran and classic motoring in NZ."

"These veteran cars were bought by my father in the 1950s. After he passed away I have been restoring them."

"I have been interested in Vintage vehicles for a large part of my life. When I was just four years of age I had a ride in a 1912 Austin 12 which my father later owned. It was one of a series of vintage/veteran Austins we restored, motored and generally enjoyed as a key interest in our lives."

"Both Model As are 1928,the first year of production, both are well looked after, both turn heads, and are brilliant examples of early car design and production."

"Being influenced by having vintage and veteran Fords my parents restored from a very early age. Enjoying driving, restoring and displaying veteran and vintage cars and having knowledge of the cars and their history."

Postwar classics 1946 - 1969 - the cars baby boomers grew up with

Owners of post-war classics to 1969 are a diverse group with some serious fans of lost British marques or badges as well as champions of well known British brands such as Jaguar, Rover, MG and Triumph.

These owners are characterised either by nostalgia – associating certain brands with their childhood or family memories – or by long-held desires to own cars that were once only a dream. The XK150 the Bentley or Mini Cooper.

Both groups are offset by the fans of postwar Americana including the 1950s Fords and Chevys that in their day were aspirational but today quite iconic of a golden age. The fandom of American cars was further fuelled by the arrival of pony cars –

the Mustangs and Camaros that got added to the bucket-list of the baby-boom generation.

Owners of this broad era of car are clearly proud to have either preserved their relatively humble vehicle associated with their childhood, or to have fulfilled their dreams. They enjoy the process of restoring their cars, and they get a kick out of sharing their experience either with family or with other enthusiasts in their circle – whether it is Mustang owners or the fellow restorers of brands that have not quite been forgotten.

These owners are aware that they have preserved these cars (and rescued these brands,) for posterity.

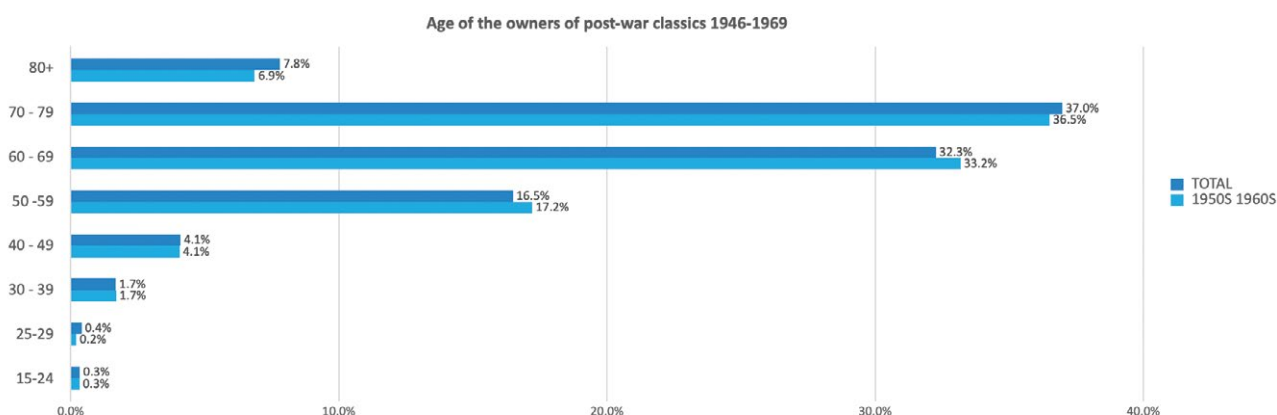
"These vehicles bring alive memories of my youth. I enjoy being the caretaker of the 1965 Mustang so that future generations can also get to drive this historic vehicle."

"A big fan of MG cars I have owned six MGs in the last 30 years. The Morris is from the same stable as the MGs and in my retirement, it gives me something to potter around with."

"A H3000 ownership was a boyhood ambition which was achieved later in life. These vehicles are one's I recall as new when I was growing up as a teenager, and I now more fully appreciate their significance to preserve for the future generations."

"The Jaguar is a car to be driven. I had my first Jaguar, an XK120, when I was a 10-year-old road engineering. The XK120 was either a Fun Ho or a Triang and we built roads with our pocketknives in clay banks. The beautiful lines of the XK120 came through in the model. I enjoy the camaraderie of the Drivers Clubs."

Postwar classic owners have a strong cohort in them



What are owners spending on their post war classics?



Estimated spend per vehicle is approx \$6,100 pa
Average ownership is 1.7 vehicles per owner

Modern Classics 1970 - 1999 *

Owners of modern classics 1970 to 1969 are a diverse group including those who own vintage and veteran cars (hence a solid readership of Beaded Wheels as well as Classic Car and Petrolhead.)

There is still a fairly even split between British marques versus American brands – though another 4% possess an Australian classic – including iconic Holdens and Falcons but also Chryslers and the Leyland P76.

Meanwhile 11% of these owners possess European cars – for example BMWs and Alfa Romeos – while ownership of Japanese cars – this was the era of classics such as the Nissan 240 and 260 series and the Toyota twin cam as well as the much loved Starlet amounts to just 1.2% of the total.

This group of owners is open minded to electric or hybrid vehicles and caravanning (4% own classic-style caravans) and they are active promoters of classics – taking part in parades, and other social events.)

What stands out when they tell their stories is their intense interest in the cars themselves. This group of owners are apt to quote the number produced, the specifics of the make and model and the qualities that made this particular model a classic worth collecting and maintaining. These stories also incorporate the passion and life-long connection the owners have with their vehicles. There is even a sense of sacrifice – saving up over a lifetime: the purchase marking a milestone achieved.

What percentage have undertaken these club activities at least 3 times in the past 12 months.	Classics 1970-1999
'Gone for a spin' or leisure run in a historic or classic vehicle owned either by yourself or a friend or family member	79%
Taken part in a parade – part of a wider celebration – e.g. Christmas parade	13%
Taken part in a meet-up, short-run outing or event organised by my club	60%
Taken part in a long-run outing or event organised by my club (e.g. over a weekend or grand tour)	20%
Entered an event dedicated to historic classic or custom vehicles (e.g. concours, rally, beach hop etc)	20%

Owners of late 20th Century classics may be keen owners of American V8s or Special Interest vehicles from Europe, and even Japan – but they express interest in travelling around New Zealand – one quarter of these club members own a campervan or caravan (including retro style,) and they are open to hybrids and electric cars as well.

Do you own a motorhome, campervan or caravan?	Owners of 1970 to 1999 modern classics
No	75%
Yes	22%
Yes - retro style	4%

Do you or any of your household own a hybrid or electric vehicle?	Owners of 1970 to 1999 modern classics
Yes	10%
No	90%

Are you planning or thinking seriously about acquiring a hybrid or electric vehicle in the next year?	
Yes	10%
No	90%

Estimated Spend by owner and per car

Annual total spend on insurance, registration, membership	Annual total spend on storage or garaging	Annual total spend on consumables, oil, petrol, polish	Annual total spend on maintenance, repairs	Annual total spend on restoration spare parts, paint, customisation	Annual total spend per owner
\$3,643	\$1,098	\$2,371	\$3,831	\$6,268	\$17,211

Owners tell their stories

"This car is one of just 183 designed and built solely in NZ. Developed by Chris Amon, with corresponding unique features, all intact. This car is the earliest built and still running example (number 006). A landmark car for Toyota, the first time an overseas offshoot had made such modifications, and backed the result with full factory warranty. Surviving numbers limited, accelerated by the 4AGE Twin cam engine and the rust issues that plagued the era."

"Bought Camaro and Corvette with cancer money received from melanoma."

"They mark a milestone on my life journey with working and saving to reach ownership."

"What can I say, I like Jaguars, The Mark IV was my Father's and hopefully one day I will restore it. The XJ6 was my first Jag and is special as it is a Factory Manual Overdrive Gearbox. The XJS is a V12, what more is there to say. The XJ8 is a V8 Supercharged car."

"As a boy I always watched Bathurst and had an ambition to own a Monaro when I was able too. I didn't realise this was to take 17 years of hard work and costs to get completed. So I have always been a Holden fan and now no longer being manufactured, is quite important to me to retain some examples. Although I'm leaning more to the Hk HT HG series Holdens now."

"I spent time living in the US as a child and loved American Muscle cars. When I finally got to a time in my life when I could afford one I bought a RHD Mustang. When Chevy announced the production of RHD Corvette with mid-engine I had to have one. I drive these cars for pleasure, not as daily transport, I have an electric UBCO moped for that."

Annual total spend per car
\$11,858

* The NZ Historic and Classic Vehicle Survey also includes "Current Classics Post 2000"; see the Final Report pages 44-52, or page 8 of this Summary Report

Current Classics (Post 2000) - where do they fit?

This is a subject with wide ranging views!

Inclusion of this category has been influenced by three factors: the changes we are seeing in the membership and vehicles within many of the FOMC's clubs; public trends; and vehicle registrations in the last 20 years.

Again, according to the public survey of 1000 New Zealanders a very significant percentage identify as owning a modern classic: 32%. Where does one draw the line? The definition of veteran and vintage cars is very clear, but with modern cars (covering virtually the last quarter century) there are mixed opinions about what counts as a classic.

Owners of modern classics Y2000 or newer are somewhat younger – on average – compared to the general profile of club owners. There are relatively more aged in their 50s and 40s. Reflecting the decline of the British motoring industry relatively fewer in this group own a British car and these are typified by Jaguars or Aston Martins. Of the American cars, the new generation of Ford Mustangs dominate the story.

Time is the best arbiter of what becomes a classic. We doubt that an owner in 1961 of an economical Fiat Bambina would have reckoned that they were buying a car that 50 years later would become a much loved classic. In our estimations of vehicle numbers we have let FoMC club figures temper the estimates from the Public Survey, and to put a limit on how many modern cars – shown in the Waka Kotahi registration figures ought to be classed as modern classics.

Some of the jury is still out. Club members were asked if they agree with this statement.
What makes a vehicle historic or a classic changes from generation to generation Some cars newer than 1980 should now be regarded as classics

Disagree	7%
Neither Agree/Disagree	18%
Agree	74%

Annual total spend on insurance, registration, membership

\$4,960

Annual total spend on storage or garaging

\$1,569

Annual total spend on consumables, oil, petrol, polish

\$2,939

Annual total spend on maintenance, repairs

\$4,806

Annual total spend on restoration spare parts, paint, customisation

\$7,445

Annual total spend per owner

\$21,717

I love V8 cars, and particularly this one's sporty looks with white body and black stripes. It was made in USA 2006 but first sold in Japan. It was then brought to NZ. It has now done only 23,600 km as verified by its original tyre's serial number. It is in mint condition. Its only change from new is its original Japanese radio has been changed to suit NZ frequencies.

Estimated spend per vehicle – approximately \$6,100 p.a. *

*This is an informed estimate. Owners of modern classics may also own other types of vehicle in their 'fleet' thus the figures may be diluted.

Public at large temptation

"Shelby GT 500 was the ultimate machine to own when I found it on the internet just 6 months old just beautiful, and the 2020 was a purchase of passion at retirement

"Ferrari - Always been a fan and they are an iconic and historic."

"We enjoy the history of the Mustang It's a big part of our social life. We enjoy meeting people and telling them our story."

"The looks of the Jaguar and Porsche and the pleasure of ownership."

"Unique, have always owned a car of this marque. Like owning something different from the norm."

"I have been diagnosed with terminal cancer and this car is my dream car and was top on my bucket list. My husband died three months before I purchased it but knew I was going to buy a Camaro eventually. The car has brought huge happiness into my life and will continue to do so until I die."



What percent would be tempted or strongly tempted

44%



What percent would be tempted or strongly tempted

30%



What percent would be tempted or strongly tempted

52%



Hot Rods and Customs - A mix of self expression, a kiwi can-do attitude and a passion for Americana

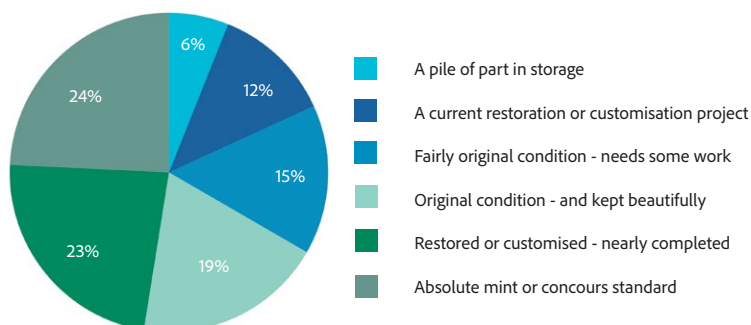
Owners of Rod and Custom cars are somewhat younger than the other ownership groups we have studied. (Of course several owners of one type of car may own other types as well). But hotrod owners are characterised in their comments as enjoying the customisation and building of these cars to their own tastes – as well as sharing the results with other like-minded individuals.

This is a sector with heavy family involvement and a 'sociability rating' that if there were such a thing would be off the scale with this group. Their cars are full of character but their main role appears to provide the entree to meet other rodders and customisers.

This group of owners spend more on the ongoing restoration or customisation than do other groups of owners yet judging by their comments they get great social and family returns from this investment.

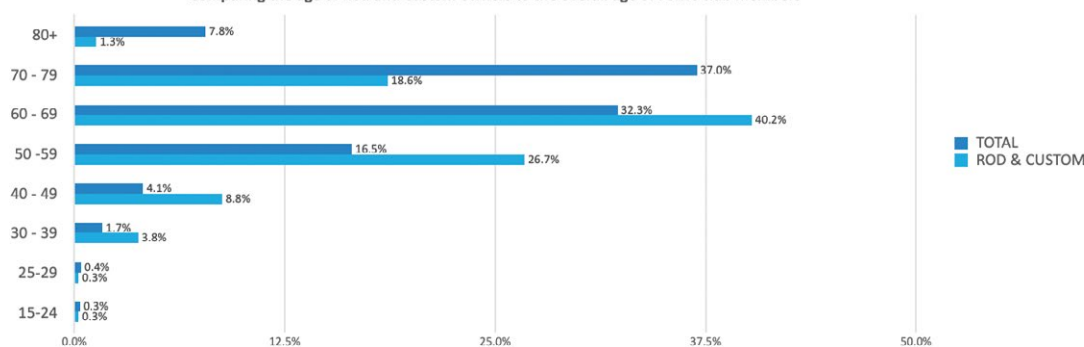


The status of the vehicles surveyed



Which of the following do you own?	Veteran & Vintage	Rod and Custom	Post War Classics 1949 - 1969	Classics 1970 - 1999	Modern Classics Y2000 or newer
'Gone for a spin' or leisure run in a historic or classic vehicle owned either by yourself or a friend or family member	75%	83%	78%	79%	81%
Taken part in a parade - part of a wider celebration - eg. Christmas parade	14%	22%	16%	13%	16%
Taken part in a meet-up, short-run outing or event organised by my club	58%	71%	61%	60%	66%
Taken part in a long-run outing or event organised by my club (eg. over a weekend or grand tour)	18%	30%	20%	20%	24%
Entered an event dedicated to historic classic or custom vehicles eg. concours, rally, beach hop etc	20%	30%	21%	20%	19%

Comparing the age of Rod and Custom owners to the overall age of FoMC club members



"Hot Rodding has opened up a whole new world of friends both nationally and internationally. We love the events for hot rodding, supporting clubs, categories and businesses. We enjoy cruising."

"I own them and spend time researching and customizing to suit a style and function that me and my wife enjoy."

"Hot rodding is a life-long passion and a big part of my life. I really enjoy the challenge of building the cars and immense enjoyment out of driving them."

"I like building/working on older cars it keeps me sane, good for mental health having to think and solve problems rather than plugging a computer into it and pressing a reset button. Meeting people in the classic/custom car community."

"Classic cars and trucks have been a big part of my life and my family's. Attending hot rod meetings and car runs with like-minded people is something that can't be replaced."

"Customised to my liking. Part of who I am and what I enjoy doing."

Historic and Classic Motorcycles

A significant passion for devoted owners who thrive on the exhilaration and freedom of riding, and an older generation motivated to recapture motorbike experiences a their youth

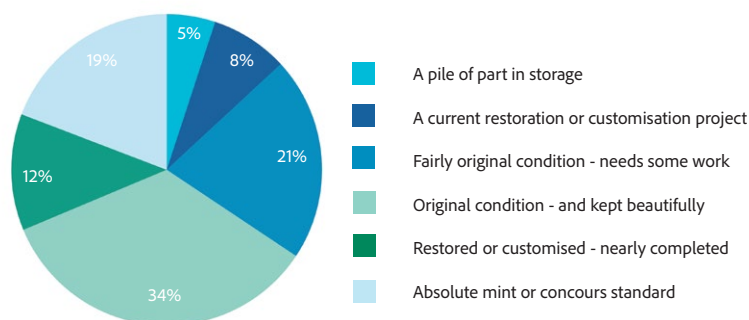
According to the public survey of 1000 New Zealanders some 20% would be tempted or very tempted to own a modern classic motorbike if they were offered one. Of the 1000 respondents in the nationwide survey, 5.7% own one or more from these categories listed below, (which, when multiplied by the number of HHs in New Zealand suggests 110,751 classic and historic motorcycles. Our final estimation however, once we take into account the Waka Kotahi registration figures as well as data from the FoMC members survey delivers a less optimistic number.

One factor leading to over-reporting is the tendency of respondents to rate their relatively new (post Y2000) as a bona fide classic. The reported rates of 'classic' motorcycle ownership doesn't translate into membership of Motorcycle Clubs. If we treat Y2000 as an eligibility cut-off point, we get 64,119 owners.

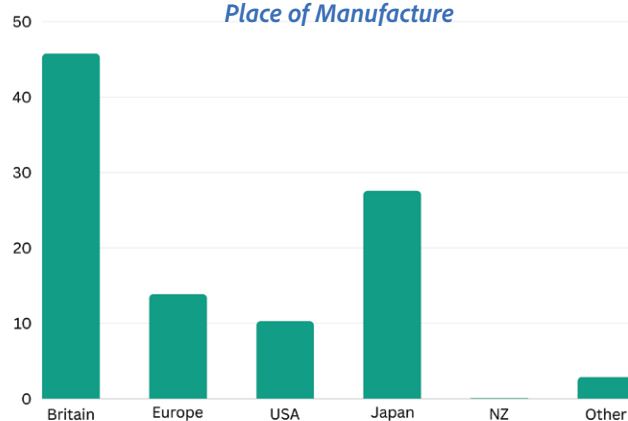
But the same data demonstrates that only a minority of respondents who report ownership of Y2000 motorcycles are members of a motoring club. (25%.)

In total we estimate 58,900 classic motorbikes.

Current status of motorbikes



Place of Manufacture



Verbatim comments from owners recapturing their freedom and the joy of their first motorbike, and what makes a classic.

"I have been riding British motorcycles since 1971, participated in a number of Classic Nation rallies. My husband and I have done many restorations in the past. We are keen on the history of these motorcycles and are keen to see them on the road to share with others. We are very keen on all motorcycles regardless of their make or age."

"MV Agusta is the last MV with 4 round titanium exhaust pipes and is a modern classic and considered Art. The Ducati is the same designer and both bikes are on display inside my house - I'd ride them more but registration is ridiculous for the few times I'd ride them."

"In the case of the Guzzi, I appreciate its classic design and love the way it goes."

"Enjoy the big American bike feel, sounds great and excellent for touring two up."

"I am now aged 83. These are the bikes that I grew up with and had many fond memories of."

"My Father had owned 15 motorcycles and my first form of transport was a motorcycle. I was able to obtain and restore an identical motorcycle as my first one."

Average road travel

662kms

Total annual costs of the total number of bikes in your collection

\$3,391

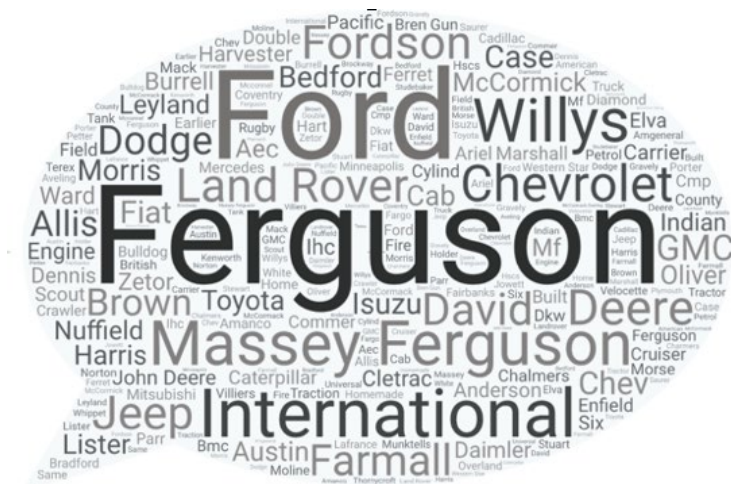
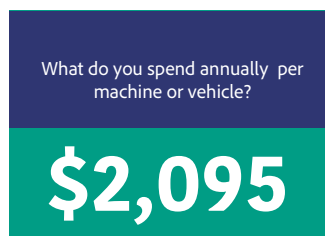
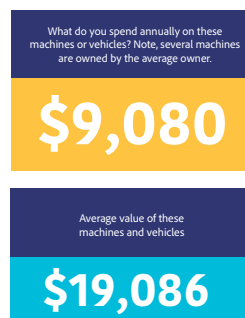
Running annual expenditure varies widely but on average it is about \$1400 per motorcycle.

The motorbikes owned by club members reflect a wide range – from the highly collectable Vincents through to the NZeta – the locally assembled Jawa-based scooter from the early 1960s. Almost half the machines come from Britain, while Japanese motorcycles account for more than a quarter of these classics.

Average value of these machines

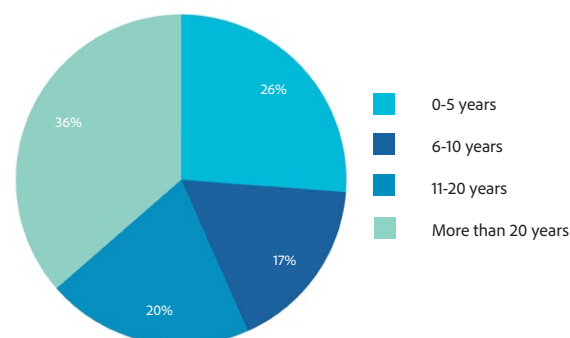
\$10,546

There is lively interest in agricultural machinery and military vehicles, with these owners representing 11 percent of the total historical and classic sector. The word picture from the research brings the iconic brands to life.



In what condition are these great vehicle and machines?
And what is the mix of vehicles across the wide range of types?
This chart tells it all.

Status of Condition (Percentages read downwards)	Stationary Engines	Steamroller, Grader, Agri Equipment	Vans, Trucks and Utes	Tractors	Military Vehicles and Equipment	Total
Absolute mint or concours standard	11%	19%	16%	11%	23%	16%
Fairly original condition - and kept beautifully	23%	28%	25%	20%	27%	24%
Fairly original condition - but needs restoring or customisation	48%	32%	28%	49%	12%	35%
Neither mint or original condition	0%	2%	1%	2%	0%	1%
Not assembled - a current restoration or customisation project	5%	9%	11%	5%	13%	8%
Not assembled - a pile of parts in storage - a future restoration or customisation project	2%	0%	4%	1%	1%	2%
Restored or customised - needs just bit more work	9%	9%	13%	9%	20%	12%
Percentage of vehicles within this category	5%	6%	34%	39%	16%	100%



There is a real passion for these specialist vehicles and machines. Owners don't simply cite the attributes of the vehicles as an attraction or reason for relating: they also cite the nation building role of their classics.

For younger owners there is often a connection to a father or grandfather who used either this machine or one just like it.

Likewise older owners are keen to pass down these classics, and the stories they embody, to the younger generation.

Owners tell their story.

"I have 3 Anderson stationary motors, 1917,1930,1931 these are built in NZ, part of our history, the 1930 was a concrete mixer, what has this built in it's time here? The ford Jailbar has been a commercial vehicle, I too have used it as a work vehicle for many years roofing."

"The Ferguson was brought new by my Grandfather so is a one family owner tractor. Absolutely irreplaceable to me. The Landrover is the only one of its kind in existence, built by REME workshops Waikouaiti as a workshop vehicle to recover M113 armoured personnel carriers."

"The Mack is very rare here in NZ, let alone in the USA where it was manufactured. I have had people from the USA approach me out of the blue, wanting to buy it for many hundreds of thousands of dollars."

"All these vehicles came from my area and are all very iconic farming vehicles."

"The jeep is used in ANZAC parades and I take it to the rest homes to cheer up the old people, especially those who served."

"Our mission is to preserve historic machinery/vehicles to display at club displays And some have been used on family farms for generations."

"They are a part of the NZ and NZ army history. The LP2 carrier is the earliest chassis serial number known to still exist out of the Petone workshops in Wellington. NZ wartime production to protect NZ in the case of invasion and only approximately 1100 ever made."

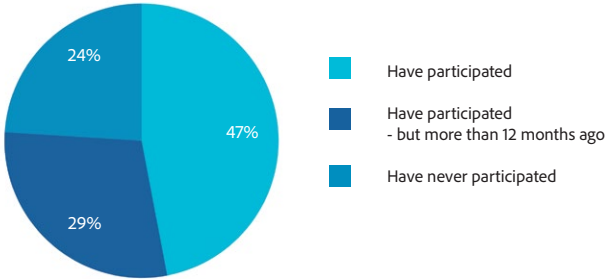
"In 2009 we sent the Dodge 1/2 ton to Istanbul and drove it around Europe to attend the 65th celebrations of D-Day. 6000km. We then bought it home. In 2014 we sent the Dodge ambulance to Palermo, Sicily, and drove it through 11 European countries to attend the 70th anniversary of D-Day. 7200km. We then shipped it home. This is a very rare vehicle worldwide."



An important part of the overall research project was to establish the overall strength of connection between the general public and the nationwide 'fleet' of historic and classic vehicles, and to measure the opinions (and emotions) people hold towards these vehicles.

Far from being hidden from view, the survey results demonstrate that members of the general public are quite likely to enjoy an interaction with historic or classic vehicles. Respondents were given a list of 9 different classic vehicle activities (parades, closed road events, motoring museums etc) and 47% reported having been involved in at least one activity in the past 12 months. By contrast just a quarter of New Zealanders aged 18+ report never having been involved in any of these activities. (Table on the next page.)

Participated in a classic or historic motoring activity



The NZ public views historic and class vehicles favourably and they want to see these vehicles out and about on the road.

I really appreciate the passion that people put into their historic or classic vehicles – they make New Zealand a better place

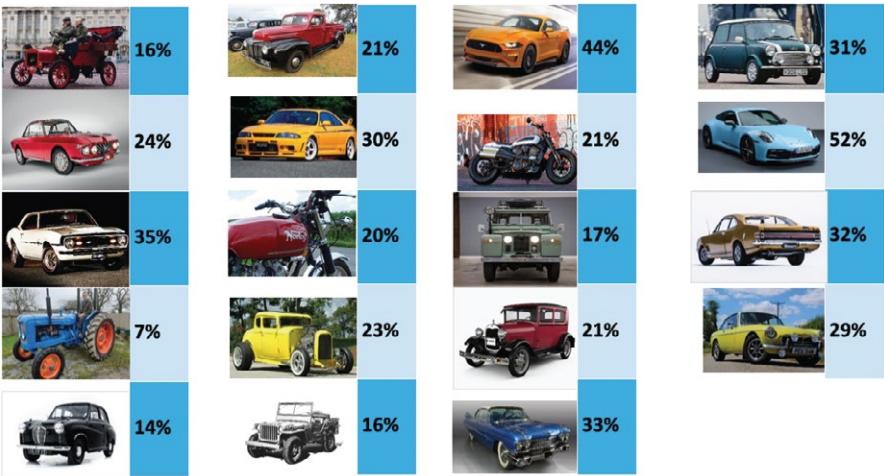
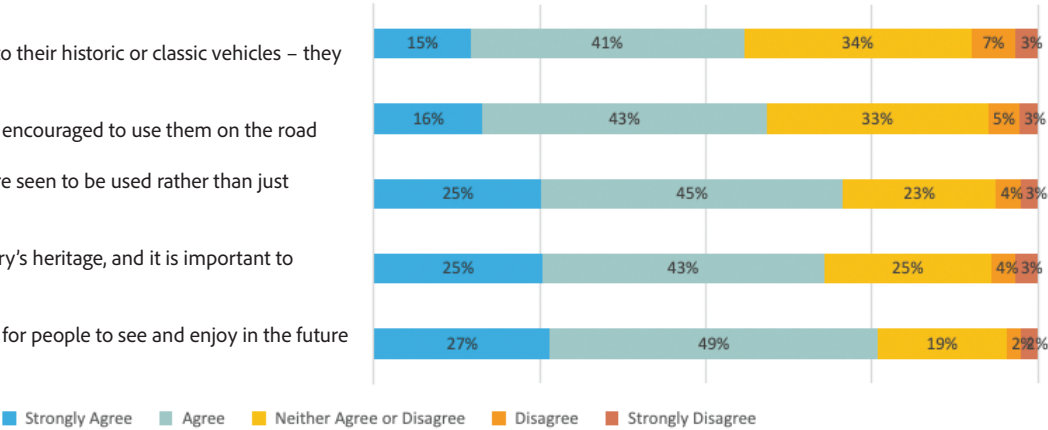
Owners of historic and classic vehicles should be encouraged to use them on the road

It is important that historic and classic vehicles are seen to be used rather than just winding up in a museum

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

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

Public view on Historic Vehicles



The temptation exercise - measuring public enthusiasm for historic and classic.

Respondants were asked to quantify their temptation for a vehicle in each of 19 categories.

The average level of desire for all respondents, men and women, all ages across all historic and classic sectors was

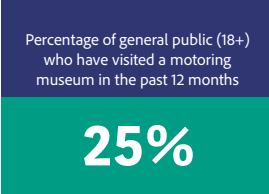
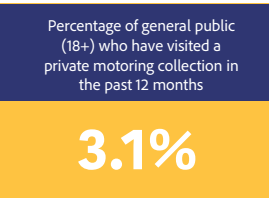
26%

Motor museums across New Zealand are an important part of the activities of historic and classic enthusiasts, as measured across the members of FoMC Clubs.

	How many motoring museums have you visited in the past?	Approximately how many dollars have you and your family spent to attend historic, classic or custom vehicle shows or motoring museums over the last 12 months
Number of respondents	4774	4774
Mean number of museums visited in the past	6	\$ 624.48



And this interest extends to New Zealand's public at large, although (understandably) at a lower level. They're also interested in other motoring activities featuring historic and classics.



The research surveyed 8 of the 21 museums listed on the web, including New Zealand's largest. Key data (averaged per museum) are....



An estimate on the number of private collections

One of the challenges was to estimate and survey private collections, most of whom operate 'under the radar'

24 private collectors were approached by the NZFOMC to garner some information enabling us to more accurately scope out the size and number of private collections.

The figures on the right represent the average across the 24 private collections.

Of note is this sector's own estimation of the number of private collections. Their informed guess: 356. If we take out the two outliers who estimated in excess of 1,000 then the collective guess is 275.

The per vehicle value of these vehicles is higher than the average value of vehicles held by most motoring club members.

The data from the sample surveyed was used to project the scale of private collections nationally.

When did you begin collecting?	Number of vehicles (include tractors and bikes)	How many visitors in the last 12 months?	Guesstimate of the number of private collections in NZ
31 years ago	67	620	356 (275 conservative)

How many cars	How many agricultural, military or trucks	How many motorbikes in the collection	Approximate value of collection
41 cars	21 vehicles and machines	7 motorbikes	\$ 4.68m

275 Estimated collections	Each with 46 estimated number of vehicles	12,650 vehicles	\$60,000 average value	Total value \$759M
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Total Economic Impact of the Historic and Classic Vehicle Sector

Key Metrics

Summary - New Zealand	Vehicles	Owners
Number of Historic and Classic cars	238, 436	66,602
Number of Historic and Classic Agricultural engines and vehicles, Trucks and Military	72,252	18,108
Number of Historic and Classic cars and Motorcycles	58,900	14,227
TOTAL	369,588	98,937

Value of fleet	Value
Historic and Classic cars @ \$52,500	\$12,517,890,000
Agricultural machines and vehicles, Trucks and Military @ \$21,152	\$1,527,551,784
Historic and Classic Motorcycles @ \$10,546	\$621,159,400
TOTAL	\$14,666,601,184

Annual running costs	Per annum
Historic and Classic cars	\$1,454,459,600
Agricultural machines and vehicles, Trucks and Military	\$189,589,248
Historic and Classic Motorcycles	\$82,460,000
TOTAL	\$1,726,508,848

Economic Impact - Owner Expenditure

Cars	
Attending museums, shows	\$4,045,747
Travel, accommodation, ferries	\$16,193,699
Annual running costs/spend	\$1,259,897,894
TOTAL	\$1,280,497,340

Agri, Military, Trucks	
Attending museums, shows	\$1,191,144
Travel, accommodation, ferries	\$4,378,152
Annual running costs/spend	\$151,367,826
TOTAL	\$156,937,122

Motorbikes	
Attending museums, shows	\$935,852
Travel, accommodation, ferries	\$3,439,804
Annual running costs/spend	\$82,459,309
TOTAL	\$86,834,965

Total annual spend by owners of classic and historic and custom vehicles

\$1,528,549,597

Average spend across all NZ households on admission to museums, car shows and other motoring events

\$259

Employment – the bottom line

The research estimates that the historic, classic and custom sectors generate at least 5200 full time trades and service specialist jobs.

Total economic footprint of the entire historic and classic vehicle sector including all expenses above, plus the investment values of owners, museums and private collections.

\$16.5B

Motorhome and Caravans

This review of owners reveals an interesting overlap between these groups and the historic and classic vehicle sectors (these motorhome and caravan figures are not included in the overall economic impact data)

Do you own a motorhome, campervan, caravan or similar?	Don't Own	Own a contemporary model	Own a retro model
NZ Public Survey (n+1000 aged 18+)	91.4%	7.7%	0.8%

Do you own a motorhome, campervan, caravan or similar?	Don't Own	Own a contemporary model	Own a retro model
Veteran & Vintage to 1945	72.3%	24.1%	3.6%
Postwar Classics 1945 - 1959	72.6%	22.6%	4.8%
Late 20th Century Classics 1970-1999	74.5%	21.6%	3.9%
21st Century 2000-2023	76.1%	21.2%	2.7%

Nationally, just under 1 in 10 New Zealanders own a motorhome, caravan, campervan or similar.

But across historic and classic vehicle owners (as measured in the survey of FoMC members), the ownership of motorhomes and caravans jumps to 1 in 4.

The survey has provided a great insight into motorhomes and caravan ownership, travel activities and expenses across members of the MCA (NZ Motorhome and Caravan Association)

Which of the following do you own?	Motorhome	Caravan	Campervan	Bus	5th Wheeler	Other
Based on survey of 9141 NZMCA Members	43.7%	37.8%	12.6%	5.3%	1.4%	1.3%
Average value	\$127,578	\$65,142	\$63,850	\$73,988	\$97,523	\$65,403
Kms travelled last 12 months	13,783kms	5,430kms	20,878kms	11,867kms	5,017kms	7,509kms
Bed nights last 12 months	118	126	70	127	114	75

Which of the following do you own?	Motorhome	Caravan	Campervan	Bus	5th Wheeler	Other
Annual spend on the motorhome, caravan, campervan etc (last 12 months). Includes servicing and maintenance, registration, insurance, club fees, equipment and accessory upgrades for this vehicle?	\$4,685	\$3,400	\$3,634	\$5,474	\$5,158	\$3,913
How much (approximately) have you spent in the last 12 months on travel related expenses like fuel, ferries, camping ground fees, groceries, local meals whilst on the road etc	\$3,993	\$4,265	\$3,775	\$5,165	\$4,732	\$4,832

Average valuation - all types

\$92,764

Average KMs travelled last 12 months

11,283kms

Average bed/nights driver and passengers

115 nights

Average annual spend on the vehicle

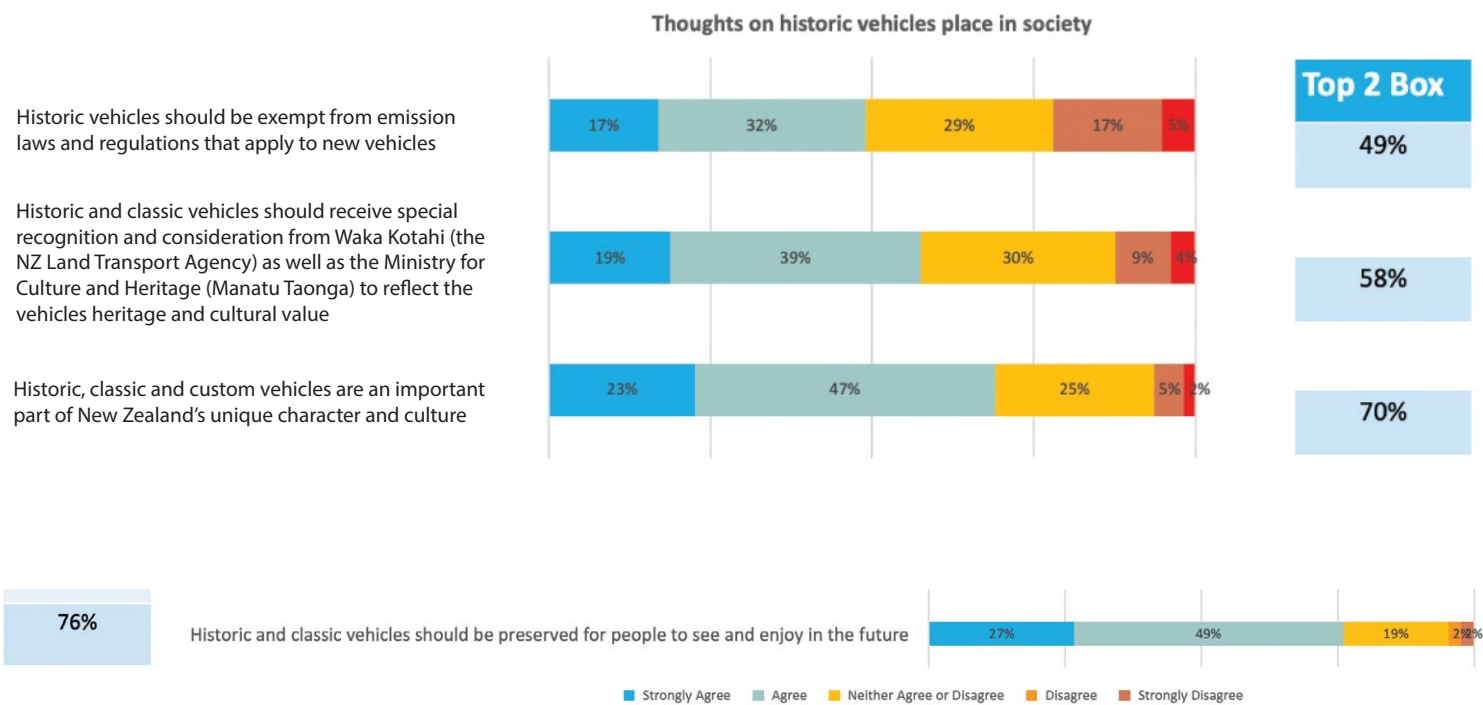
\$4,098

Average annual vacation spend - travel, fuel, camping fees etc

\$4,330

\$468M

Total MCA member spend in the New Zealand economy - motorhome and caravan expenses plus travel costs. (This figure is not included in the economic footprint of the historic and classic vehicle sector).



Owners tell their stories

“These types of vehicles are part of our history, and take us back to the days when a car was an important piece of our history, not just a mobility device to get to work. Most people remember a friend/uncle/relative who had one or similar, and it brings back the nice memories. One of the pleasures of driving my classic is the friendliness and happiness it brings to people, who smile, wave or give the thumbs and it obviously brings a ray of sunshine into their lives.

“I consider classic vehicles to have as much importance in NZ history as any historical building or structure. These vehicles have given myself and family/ friends much pleasure over the past years and have had a major part in social connections.”

“Motoring these vehicles, we have travelled all over New Zealand, going to places we wouldn't ordinarily have gone to and made many life-long friends. We have taken part in many events all over the country such as international and national rallies and Art Deco. We are driving our history.”

“My Austin 7 was built by my father when he was a teenager, and he taught me everything I know about cars when he handed it to me when I was 15. We rebuilt the car together, and it's incredibly special to me and holds many memories.”

“We are the caretakers of these beautiful machines. They are loved by all at events we attend in all communities we visit. We get to meet like-minded people on a regular basis and having pride in keeping these forms of art in pristine condition.”

“These vehicles are part of New Zealand's Motoring History , and the cars are now fairly rare and we are very pleased to be able to drive them and display them for the public to see and enjoy . It brings back a lot of memories for people and often have people come up and say they had cars like these or similar.”

Methodology

In the course of this research project Glasshouse conducted a number of surveys in parallel.

Public Survey. Conducted on-line, 1002 New Zealanders aged 18+ (and balanced against Census figures by gender, age and geographic location) shared their opinions toward historic and classic vehicles in NZ. This study acted as a reference point to the other surveys.

Club Executive Survey. This achieved two things. First it was necessary to gain permission from the clubs to forward the members' survey. Presidents/secretaries from FoMC's 160+ clubs were invited to give their insights into the scale and scope of their membership and club activities.

Club Members Survey. Invited via their individual clubs across all sectors, 4776 respondents completed a very comprehensive questionnaire that also invited them to record key information regarding vehicles owned, valuation, usage and economic impact data.

Survey of Motoring Museums and Private Collectors. Glasshouse researchers interviewed a sample of public museums, and FoMC project team surveyed a large number of private collections confidentially.

Service providers. A light scoping exercise of trades and service providers to the historic and classic sectors. This was limited in scale – an online survey that attracted a very low response rate. However it generated some expert opinion which influenced our calculations on the economic impact of the Historic and Classic sectors.

The analysis of data was quite complicated and time consuming, due to the scale and complexity of the data obtained across multiple sources, and the differing response levels across the clubs and their members. Desk research was also extensive, particularly the detailed registration data generously contributed by NZTA Waka Kotahi.

A total of 15500 surveys were conducted, June-July 2023. Preliminary headline results were published Sept 2023. Detailed research continued through Qtr 4, culminating in the 150 page Final Report February 2024.



Introducing Glasshouse Consulting Ltd

Survey and research design, execution, analysis and interpretations was 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, together with deep automotive interests.

His access to and experience with a broad range of analytical tools empowers him to extract more insight from survey data to reveal deeper answers and respondent insights.

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 new car buyers research 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.

How are "Historic" and "Classic" Vehicles defined?

For the purposes of the NZ Historic and Classic vehicle Survey, the federation has been guided by the international definition of "Historic Vehicles", by the composition of the Federation's member clubs, and (to a degree) wider NZ public understanding and interpretation.

Accordingly "Historic Vehicles" in the Survey comprise all "veteran vehicles" (built 1918 or earlier) and "vintage vehicles" (1919 to 1945), whether they be cars, motorcycles, trucks, tractors and agricultural machinery, or military vehicles. "Classic vehicles" in the very widest sense includes notable and collectible vehicles from 1945 onwards. In this Survey three sub groups are identified, "post war classics", "modern classics" and "classics post 2000".

It is acknowledged that there is some subjectivity in these applications, especially across the most recent years.

Most of the research and data in this extensive Survey is focussed on Historic and Classic Vehicles as per the foregoing. Additional is the inclusion of the economic contribution (to NZ) of the recreational sector, recognising the importance of the motorhome and caravan sector within the Federation's membership, and the contribution of this sector to the NZ economy. These MCA references are identified separately and not included in the data and specific conclusions across the Historic and Classic Vehicle Sector

NZ Federation of FoMC Motoring Clubs Inc

Protecting our heritage into the future

Grateful thanks to our funders and member club donations who made the NZ Historic and Classic Survey possible!

NZ Hot Rod Association
Vintage Car Club of NZ
MG Car Club (Wellington Centre)
Motorhome and Caravan Association
Amherst Properties Ltd
Colonial Motor Company Ltd
Garry Jackson
Jessie Craig
Mr and Mrs Washer

All American Truck Club of NZ
American Classic Car Association
American Classic Car Club
Association of Rover Car Clubs
Auckland Mustang Owners Club
Austin Healey Car Club
Bay of Plenty Mustang Owners Club
Canterbury Mustang Owners Club
Case and Vintage Farm Machinery Club
Classic and Sports Car Club

David Brown
Egmont Classic Car Register
Ford 8 and 10 Club
Fiat Owners Car Club
Jaguar Drivers Club
Jaguar Owners Club Taranaki
Jaguar Owners Club Marlborough
Jowett Car Club
Manawatu Mustang Owners Club
Mid Canterbury Vintage Machinery Club
Morgan Owners Club
Model A Ford Club
Model T Ford Owners Club
Morris Register
Norton Owners Club
Nelson Classic and Vintage Motorcycle Club
NZ Military Vehicle Club
New Plymouth Classic Motorcycles Club
Otago Historic Motoring Club
Peugeot Car Club

P76 Club
Reliant Scimitar Owners Club
South Canterbury Zephyr and Zodiac
Enthusiasts Club
Stag Owners Club
Standard Enthusiasts NZ Club
Southern Mustang Owners Club
Studebaker Drivers Club
Taranaki Mustang Owners Club
Taranaki Speedway Club
Taranaki Citroen Car Club
Taranaki Vintage Machinery Club
Tauranga Vintage Machinery Club
The Classic Motoring Society of NZ
Timaru Post Vintage Car Club
Top of the South Model A Ford Club
Vincent Motorcycles Club
Waikato Mustang Owners Club
Waikato Motorcycle Club
Zephyr Owners Club



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

Project Credits

FoMC Survey Project Team: Michael Anderson (Project Director), Chris Dyer, Garry Jackson

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