

THE 2020/21
**NATIONAL HISTORIC
VEHICLE SURVEY**

FEBRUARY 2021

SUMMARY REPORT

Published by
The Federation of British Historic Vehicle Clubs





About the Federation of British Historic Vehicle Clubs

The Federation of British Historic Vehicle Clubs Ltd (FBHVC) exists to uphold the freedom to use historic vehicles on the road. It does this by representing the interests of owners of such vehicles to politicians, government officials, and legislators. There are over 500 subscriber organisations representing a total membership of over 250,000 historic vehicle owners, in addition to individual and trade supporters.

www.fbhvc.co.uk

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What is a historic vehicle?

For the purposes of this National Historic Vehicle Survey, the FBHVC has followed the international definition of Historic Vehicle; any form of mechanically propelled vehicle that is over 30 years old, is preserved and maintained in a historically correct condition, is not routinely used as daily transport and is part of our technical and cultural heritage.

This definition should not be confused with the UK Government's criteria for historic vehicle tax exemption which is based on vehicles more than 40 years old, nor with HMRC's definition of classic and historic cars for import duty and benefit in kind purposes. The Federation recognises that there are many newer vehicles that attract the term 'classic' rather than 'historic', particularly classic cars and motorcycles that are sought after and valuable vehicles. These vehicles are not included in the survey.



JDA Insight & Strategy

JDA is a consultancy that works with market research data to develop strategic thinking for industry. JDA focuses on design, managing, executing, analysing and delivering insight projects that inform and guide decision making across multiple sectors including Motor, Sport, Manufacturing and Energy.

www.jdaresearch.co.uk

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Report designed by **Matt Walker** DVLA data supplied by **GMAP Analytics**

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1,538,927



THE NUMBER OF HISTORIC VEHICLES REGISTERED IN THE UK (UP FROM 1,039,950 IN 2015)

683,967



THE ESTIMATED NUMBER OF HISTORIC VEHICLE OWNERS IN THE UK (UP FROM 493,000 IN 2016)



4.6M

THE NUMBER OF PEOPLE IN BRITAIN THAT WOULD LIKE TO OWN AN HISTORIC VEHICLE



1,200

MILES PER ANNUM

THE AVERAGE DISTANCE TRAVELLED BY HISTORIC VEHICLE OWNERS (IN HISTORIC VEHICLES)



£4,223

PER ANNUM

THE AVERAGE AMOUNT AN HISTORIC VEHICLE OWNER SPENDS ON THEIR VEHICLE



£7.2BN

THE ESTIMATED TOTAL SIZE OF SPENDING IN THE HISTORIC VEHICLE SECTOR (UP FROM £5.5BN IN 2016)



£946M

ANNUAL VALUE OF FOREIGN SPENDING WITH BRITISH FIRMS ON HISTORIC VEHICLE PRODUCTS & SERVICES



34,113

ESTIMATED NUMBER OF JOBS SUPPORTED BY THE HISTORIC VEHICLE SECTOR



18.7 MILLION

THE NUMBER OF PEOPLE IN THE UK THAT SEE HISTORIC VEHICLES AS AN IMPORTANT PART OF OUR HERITAGE



35%

THE PROPORTION OF HISTORIC VEHICLE OWNERS THAT CURRENTLY CONTRIBUTE OR WOULD CONTRIBUTE TO A CARBON OFF SET SCHEME

FOREWORD

from the Chairman

The Federation has been in existence for over 32 years and its first major research project was undertaken 23 years ago in 1997 when it was recognised that to be an effective lobbying organisation, it needed facts about the historic vehicle movement, facts that were not available from other sources.

The 2020 National Historic Vehicle Survey is our fifth major research project. The results show a significant increase in both historic vehicles and owners. On the face of it those facts alone suggest a thriving movement. However while it sounds like a cliché to say that we live in times of unprecedented change, it is true. The threats to vehicles driven by the internal combustion engine have never been greater. There is a huge job to do to ensure Government and the public at large recognise the importance of historic vehicles.

Nobody could have predicted the impact of the Covid pandemic and the move towards electric vehicles has moved on at an ever increasing rate. The introduction of electric vehicles of itself will not affect historic vehicles based on the internal combustion engine. What will affect our movement is the effect increasing numbers of electric vehicles will have on the availability of petrol and diesel and how historic vehicles will interact with modern vehicles as they move towards autonomous driving and other forms of automatic control. Our research seeks to demonstrate the importance of historic vehicles both to the UK economy and as heritage assets that should not be consigned to the scrap heap of history.



I would like to thank all the contributors to our survey, without your input, our research would not be as robust and authoritative. This summary report identifies key statistics that will be used in representations to Government and Government agencies. There is a great deal of further information behind the headlines and we have been releasing this through our Fact File format. This has allowed us to successfully direct attention to key survey findings and specific issues of importance.

I would also like to thank JDA Research for their work in designing the enthusiast, club and trade surveys and for their expertise in drawing out and presenting the key threads from the survey results.

I hope you enjoy reading the report and that its content will cause you to reflect on how important the historic vehicle community is to the United Kingdom.

David Whale

David Whale
Chairman
February 2021



The rapid growth in historic vehicles

The figure for historic vehicles now stands at more than 1.5 million, an increase of nearly 50% since December 2015. Historic vehicles account for just 3.4% of all vehicles registered on the DVLA database, but fewer than half of these vehicles (44%) are licensed for on-road use.

1,538,927

The number of registered historic vehicles in the UK

Over the next 5 years we estimate that the number of vehicles defined as historic will grow by an additional 600K meaning the total number will exceed 2 million vehicles by 2025.

584,393

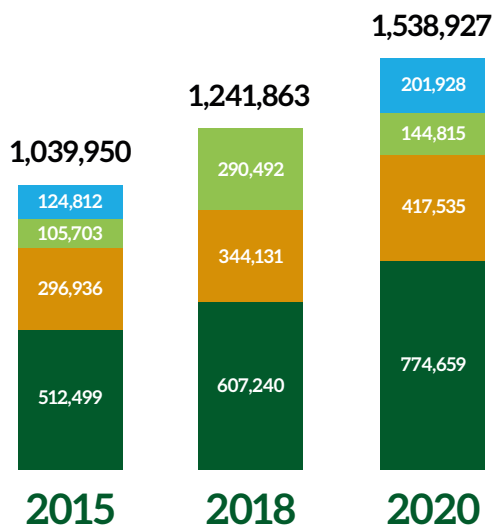
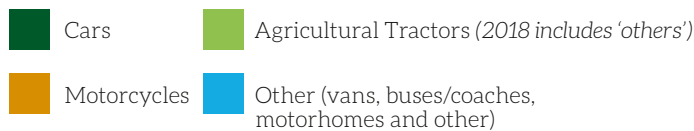
The number of registered young timer vehicles in the UK (manufactured between 1991 and 1995)

Chart 1: Growth in registered historic vehicles (2015-2020)

Source: Analysis of the DVLA database registered vehicles.

GROWTH IN HISTORIC VEHICLES

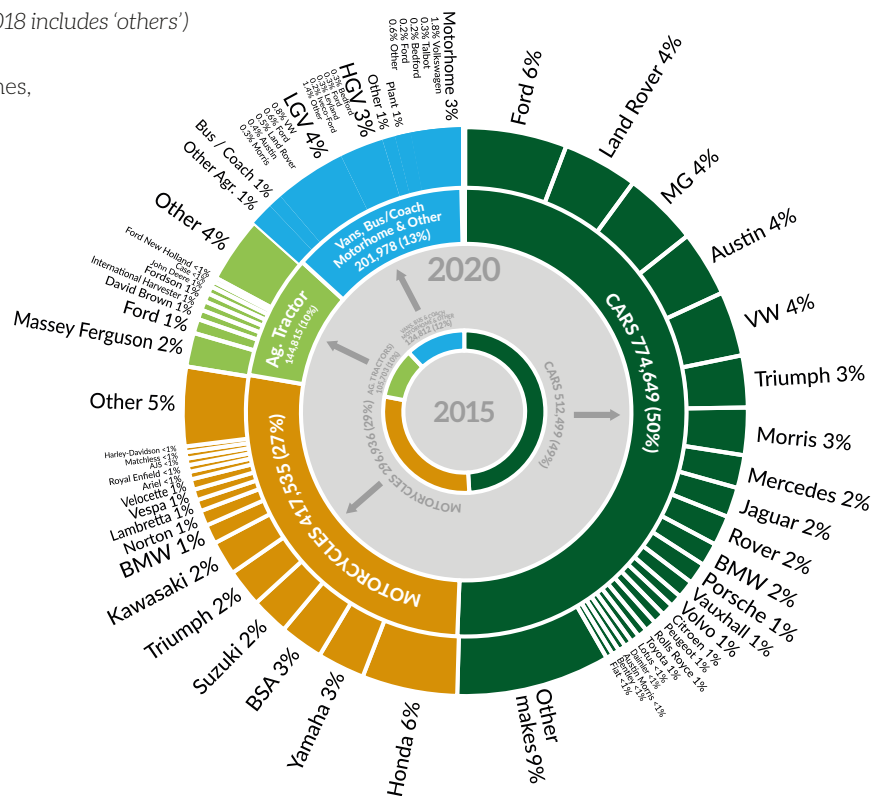
5 YEAR TREND



REGISTERED HISTORIC VEHICLES IN THE UK

PROFILE OF HISTORIC VEHICLES

BY TYPE & MAKE



Note: Thanks to GMAP Analytics Ltd for provision of data for DVLA analysis.

More historic vehicle owners than ever before

In tandem with the growth in historic vehicles there has been a rapid increase in the number of owners in the UK. In 2020, we estimate there are nearly 700,000 individual historic vehicle owners, 39% higher than seen in 2016 where the equivalent estimate was just below 500,000.

683,967

Historic vehicles owners

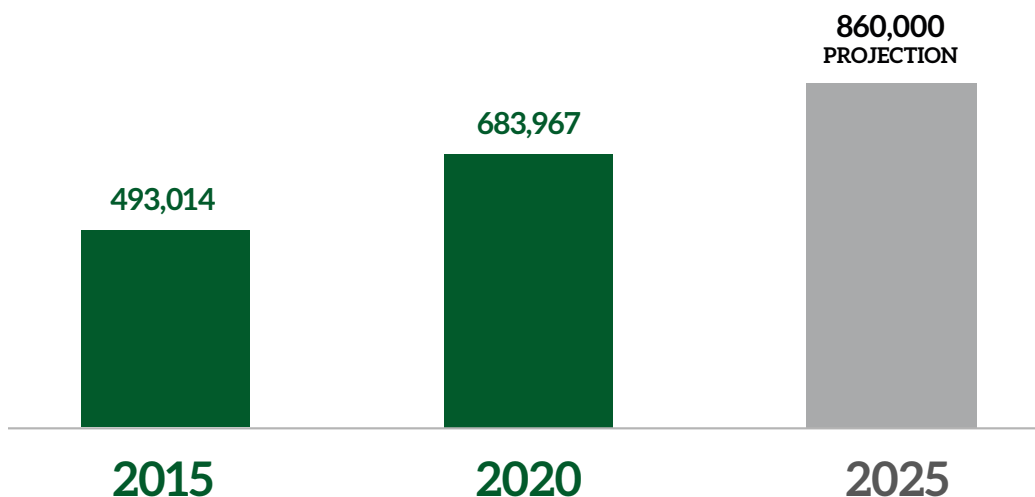
Estimated number of historic vehicle owners

63 (up from 61yrs)

Average age of an owner

Average age of an historic vehicle owner in 2020 compared to 2016

Chart 2: Estimated number of historic vehicle owners (2015-2020)



We estimate that 1 in 4 current owners of historic vehicles also own a young timer vehicle (registered between 1991-2000), suggesting that as the number of new historic vehicles grows, so will the number of new owners. Our best projection is that by 2025 there will be an additional 150-200K owners of historic vehicles.

Note: The estimate of historic vehicle owners tracks the number of registered historic vehicles divided by the average number of vehicles owned in the survey results (2.25). It allows a like-for-like comparison to be made every 4-5 years. We have applied similar logic to the calculation of new historic vehicle owners over the next 5 years. Please treat as indicative and with some caution.

What is a historic vehicle?

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Few historic vehicles are used for regular transport

The average mileage driven or ridden per annum in a historic vehicle is 1,200 miles. This estimate remains virtually unchanged from 2015 (1,124 miles) indicating that use of historic vehicles has changed little in that time.

At the time of our survey only 44% of historic vehicles are licensed for the road and are used, on average, around 16 times per annum.

1,200

Miles per annum

Average miles driven per annum in a historic vehicles (no change from 2016)

54%

Used for short runs

Proportion of historic vehicles used for short runs (no change from 2016)

800

Million miles

Mileage driven or ridden by historic vehicles per annum (an estimated 0.2% of all miles driven or ridden in the UK)

35%

Environmentally aware

Historic vehicle owners that currently contribute or would contribute to a carbon off set scheme

16

Times per annum

Average number of times an historic vehicle is driven or ridden on the road per annum (no change from 2016)

0.2%

of all miles travelled on UK roads

The proportion of all miles accounted for by historic vehicles

Many owners (54%) use their vehicles for short runs, or to attend related events (46%). Overall, we estimate that historic vehicles account for fewer than 800 million miles per annum. This equates to 0.2% of all miles driven by all forms of motor transport in the UK.

Historic vehicle owners are environmentally aware with 35% saying they would, or already do, contribute to a carbon offset scheme, and more than half (52%) believing that zero emissions is a good idea.

Note: Total mileage percentage estimate is based on a total of 356.6 billion miles driven by all UK vehicles according to DVLA.





An accessible hobby with phenomenal value

The total value of the entire historic vehicle fleet in the UK is an estimated £25.8 billion, with cars continuing to attract the highest values (on average £26K), and motorcycles and tractors valued considerably lower (£6.7K and £3.5K respectively).

Whilst average vehicle values will reflect a very wide spectrum across different makes and types it does not appear that cost is necessarily a barrier to owning an historic vehicle. Survey results show that more than half of all historic vehicles (51%)

have a value less than £10K, and that owners have average annual incomes of around £45K. These two findings provide a useful insight when considering how to attract and retain new owners.

£25.8

Billion

Estimated value of the historic vehicle fleet in the UK

39%

< £35K

Nearly 2 in 5 owners earn less than £35K per annum

£45K

Per Annum

Average gross income of historic vehicle owners

51%

< £10K

Historic vehicle values



The appeal of makes and marques

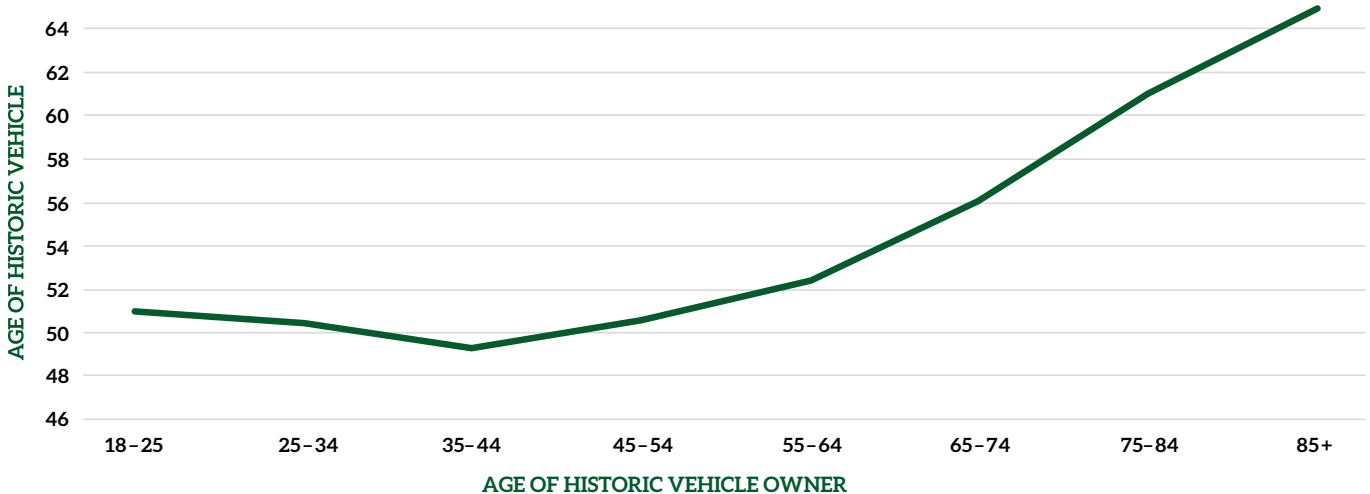
There is a close connection between owners of different age groups and historic vehicles of particular eras. For example, by reviewing averages we can see that younger historic vehicle owners (those aged under 44) tend to own vehicles that are around 50 years of age (from the 60s and 70s), and then as the age of owners increases so does the age of the vehicles they own.

This pattern seems to support strongly the hypothesis that aspiration towards particular makes and marques is instilled at a young age and then carried through when owners are in a position to achieve their aspiration. Whilst this is a nice story to deliver through survey results, it also raises concern when

trying to identify who the future owners of older vehicles will be. That concern involves the wider issues of culture and heritage, and quite literally keeping yesterday's vehicles on tomorrow's roads.

Chart 3: Average age – owner and historic vehicles owned

Sample Size: All historic vehicle owners (n=13,596)



Note: The average age of a historic vehicle owner in 2020 is 63 years and was 61 in 2016.



Strong levels of interest in the sector from the adult population

Public opinion towards historic vehicles remains strong as is seen via a national poll we conducted in January 2021. A representative sample of the British population were asked their views and opinions about issues impacting the historic vehicle movement. As the results below indicate, we conclude strong support for key areas of the movement:



18.7 MILLION PEOPLE

See historic vehicles as part of this country's heritage and that it is important to maintain them



4.7 MILLION PEOPLE

Say they are interested in owning a historic vehicle in the future



18.7 MILLION PEOPLE

Think that historic vehicles should be maintained in as original state as possible



2.1 MILLION PEOPLE

Tell us they attended a National historic vehicle event during 2019



16.7 MILLION PEOPLE

In Britain think that maintaining historic vehicles is an important part of our culture and heritage



10.4 MILLION PEOPLE

Think that young people should be encouraged to take an interest in historic vehicles



Note: The above results are based on a representative sample of British adults. The FBHVC have published a 'Population Views' Fact File that explains more.





The historic vehicle sector delivers important economic value to the UK

The average sum that owners spend on their vehicle(s) each year has increased to £4,223 per annum, from £3,400 in 2015. The combined value of all owner spending that is 'directly' attributable to their historic vehicles is nearly £2.9BN per annum.

The importance of the sector to the UK economy in terms of all areas of annual spending has grown more than two thirds in the last decade, and is now estimated to be £7.2BN per annum. Around 13% of spending is derived from overseas historic vehicle owners utilising the products and services of UK firms.

£4,223

Annual spending
Estimated annual owner spending on their historic vehicles

£946M

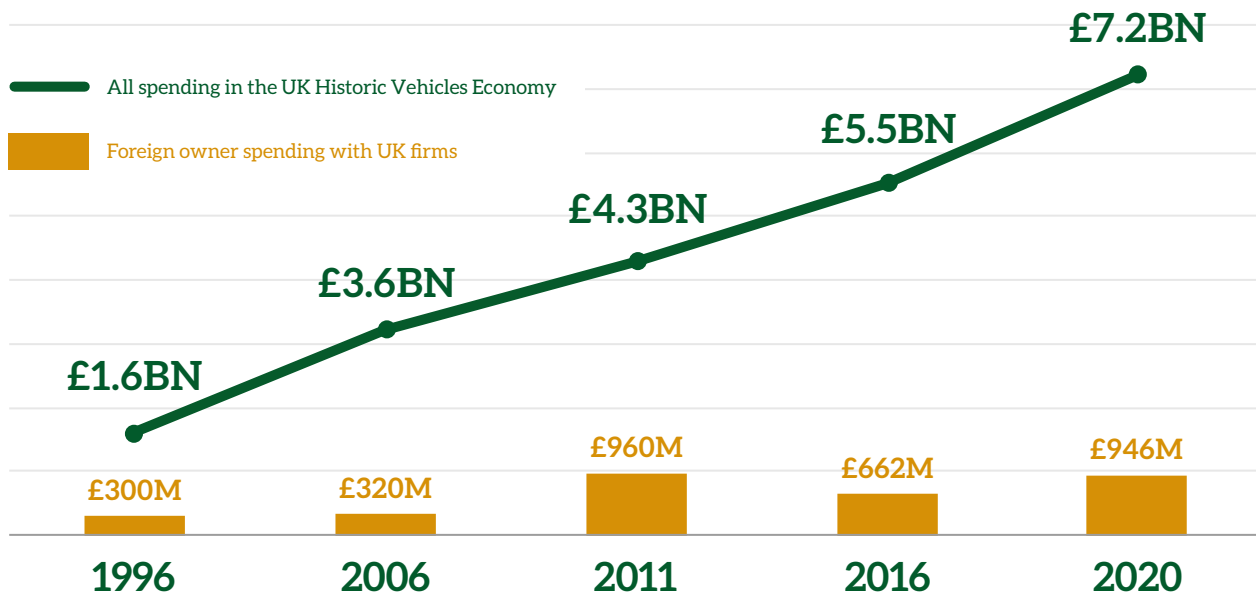
Inward spending...
Estimated foreign spending with UK firms from foreign historic vehicle owners

£7.2BN

Total annual spending
Estimated total value of spending on historic vehicles and activities in the UK economy

Chart 4: Annual value of the historic vehicle economy 1996-2020

Sample Size: n=14,485 historic vehicle owners, n=32,062 historic vehicles, n=198 businesses



Note: Spending that is directly attributable includes items such as storage, maintenance, fuel, oil and tyres and garaging etc. Economy growth 2011-2020 of £2.9BN (67% , or two thirds of 2011 value £4.3BN).

The scale of spending within the historic vehicle economy in 2020 is significantly larger than in 2016. This is the case in all areas of spending covered in the survey with the exception of vehicle sales, as this area is resistant to accurate measurement for a variety of factors.

Table 1: Spending economy for historic vehicles (based on 2019 spending)

Category of spending	2016	2020
1. Direct spending	£1,800,000,000	£2,889,000,000
2. Wealthy owner spending	£271,000,000	£369,000,000
3. Indirect spending	£414,000,000	£598,000,000
4. Vehicle sales	£2,100,000,000	£2,082,000,000
5. Foreign owner spending	£662,000,000	£946,000,000
6. UK trade to UK trade	£262,000,000	£272,000,000
Total annual spending	£5.5 BN	£7.2 BN

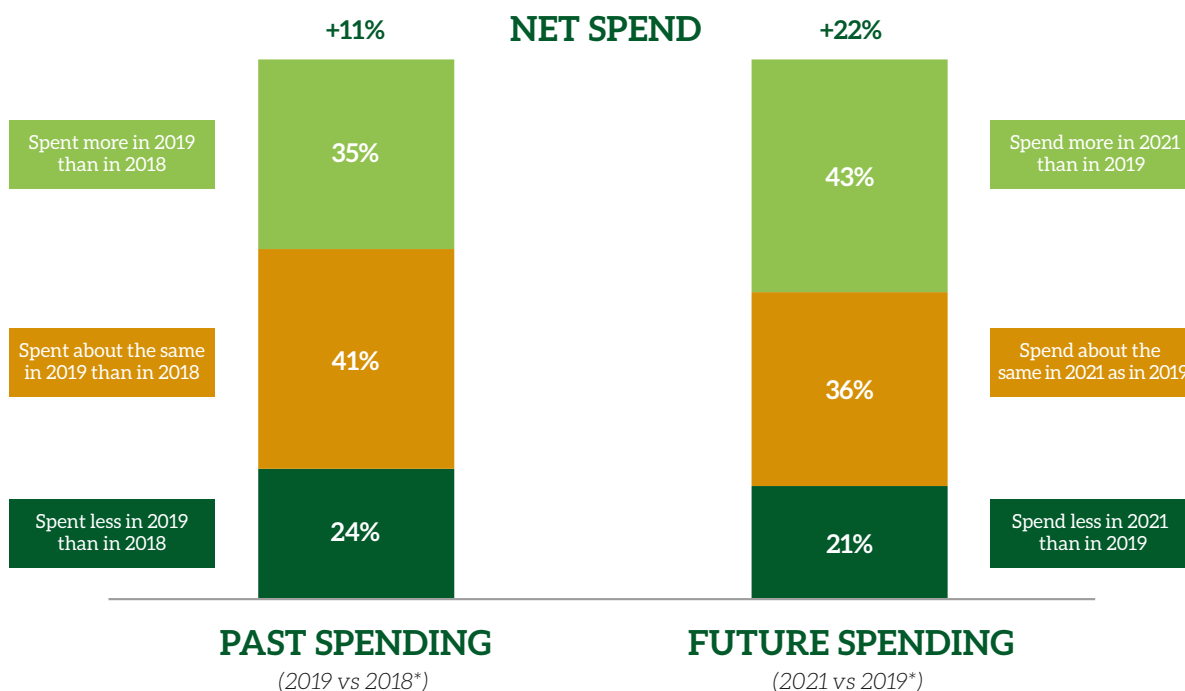
Note: £7.2BN includes all areas of spending e.g. direct spending by owners on their vehicles, indirect spending on items associated with owning vehicles or enjoying as a hobby, the estimated spend by wealthy owner/collectors, the value of historic vehicle sales, foreign owners spending with UK firms and spending by UK firms on products and services from other UK firms.

Spending patterns are further mapped out by reviewing past and future trends amongst owners. Here we see that there is potential for a doubling in 'net spend' in 2021 compared to 2019. This may reflect the turbulence caused by the Covid-19 pandemic, but is nevertheless confirmation that the historic vehicle economy is buoyant.

Chart 5: Spending trends past and future

Question: Thinking about the amount you spend on historic vehicles, would you say you are/expect to...

Sample size: n=14,485 historic vehicle owners



Note: Net spend is the difference between owners that have spent more and those that have spent less

*2020 was deemed not comparative due to the impact of the Covid 19 pandemic /future spending estimates based on status of Covid-19 pandemic as of September 2020 and is likely to be subject to change.

Employment and skills retention at good levels

The historic vehicle industry is working hard to retain the skills and experience that support the sector and help to maintain historic vehicles in working condition.

Results from the survey indicate that employment levels in the sector are likely being maintained against an uncertain economic backdrop. In this regard we report that the sector

supports an estimated 34,000 in 2020, a number that is very much in line with 2015 (34,920).

3,820

Businesses

Estimated number of businesses providing products and services to the historic vehicles sector

34,113

Jobs

Estimated employment in the historic vehicle sector

29%

Expect to grow

The proportion of business owners or managers that expect their business turnover to grow

12%

Offer training or apprenticeships

Proportion of businesses that offer a training or apprenticeship scheme

39%

Planning training or apprenticeships

Proportion of businesses that don't currently provide a scheme, but are planning, or would consider offering a training or apprenticeship scheme in the future

Note: The above results are based on a small number of surveys and the reader should treat these estimates with some caution.





Methodology summary

Scope of the report

The objectives of this report are to highlight some headline results from the 2020 National Historic Vehicle Survey. We have drawn results from a range of sources to give you, the reader, a wide perspective of the historic vehicle movement in the United Kingdom.

Our hope is that the findings provide a valuable resource to the industry and further stimulate understanding of the sector across an important range of stakeholders including government, politicians, international partner bodies, together with historic vehicle enthusiasts and other interests groups amongst the British population.

Methodology

The results presented in this report have been taken from three stages of primary research undertaken by JDA Research:

1. 15,422 online surveys with historic vehicle owners (n=14,485) and enthusiasts (n=937) were completed between May and October 2020. The survey questionnaire was approximately 15 minutes in length and included questions on interest, ownership, cost of ownership, together with a range of questions about behaviours associated with the historic vehicles sector e.g. event attendance. The survey was promoted by the FBHVC and via clubs, on social media and through events media partners.
 2. 206 online surveys with businesses that provide products and services to the historic vehicle sector were completed between September and October 2020. These include a range of different types of business from repair and restoration to museums and events. The survey questionnaire was approximately 15 minutes in length and included questions on attitudes and opinions and level of turnover and export. Please note: This survey was not structured to be representative of the sector and only provides an indicative level of insight that can be measured against the equivalent survey in 2016. Treat with caution.
 3. 2,500 online surveys with a representative sample of the GB population were conducted by Kantar research in January 2021. All surveys were conducted via an online panel of respondents and representative of the population by age, gender and region. The survey asked questions that aimed to measure public opinions, attitudes and levels of interest in historic vehicles.
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General notes to reader:

While every care has been taken to ensure accuracy in presenting these results, there is nevertheless the need to review these findings with a critical eye. The sector is resistant to a complete review due to its complexity and, indeed, this survey does not attempt to conduct a complete analysis. Assumptions made in this survey may be different to other surveys conducted in the sector.

For the purpose of clarification, where appropriate we refer to the British Population (relating to England, Scotland and Wales). This is to help the reader appreciate the scale and volume of opinion associated with our areas of investigation when surveying the British population. For the purposes of estimating population sizes, we have based grossing up on the adult (16+) population estimate of 51.9 million people).







**The Federation of British
Historic Vehicle Clubs**

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