



POPULATION VIEWS

ATTITUDE & OPINION FACT FILE

THE NATIONAL HISTORIC
VEHICLE SURVEY

2020/21

WHAT DOES THE BRITISH PUBLIC THINK OF HISTORIC
VEHICLES AND WHERE CAN WE BUILD SUPPORT?



FEDERATION FACT FILE



INTEREST IN HISTORIC VEHICLES STAYS HIGH, BUT DO WE NEED TO FIGHT HARDER OR SMARTER FOR THE ATTENTION OF YOUNG PEOPLE?

This Fact File contains results from 2500 nationally representative surveys completed with British adults (aged 16+). Participants were presented with statements that could be used to describe their opinion towards historic vehicles which ranged from interest to views on heritage. From this we are able to build an understanding of how the public view historic vehicles and can compare to equivalent surveys conducted in 2016 and 2018. We are now able to see trends over time and to understand how the public's attitude might be changing. All results have been stratified to be representative by age, gender and region with population estimates based on an estimated 51.9 million British adults.

A reminder of that we already know...

1,593,827

the number of historic vehicles registered on the DVLA database (+50% compared to 2016)

683,967

the estimated number of historic vehicle owners in the UK (+38% compared to 2016)



£7.2BN

the estimated spending associated with historic vehicles per annum

3.4%

the proportion of vehicles registered in the UK that are 30 years or older

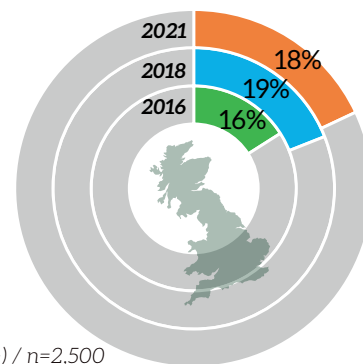
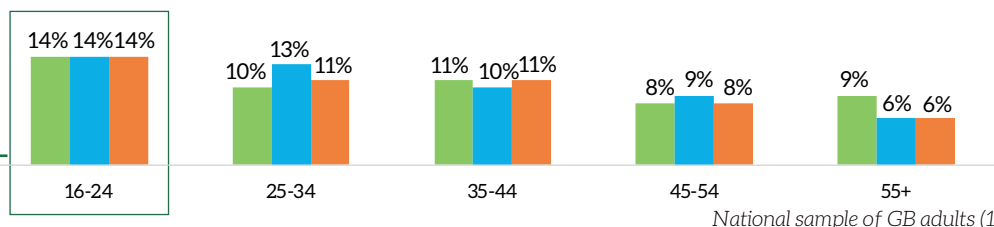
SO WHAT DOES THE BRITISH POPULATION THINK...? and what is their attitude towards historic vehicles in a world where Covid-19 will be an ongoing reality?

Our national opinion poll tells us that almost 1 in 5 adults across all age groups are interested in historic vehicles (18% of adults, or 9.3 million people).

We can also see that as many as 1 in 10 (9% of the population, or 5.2 million people) say that they would like to own a historic vehicle in the future. It is also significant to the sector that younger adults (16-34 yr olds) show the greatest interest.

"I am interested in historic vehicles"
National sample of GB adults (16+) / n=2,500

Statement: "I would like to own an historic vehicle"



So what is the problem?

Whilst there is plenty to be happy about in terms of public interest in historic vehicles, the results also present some pretty fundamental concerns that appear to be divided along age lines... read on:

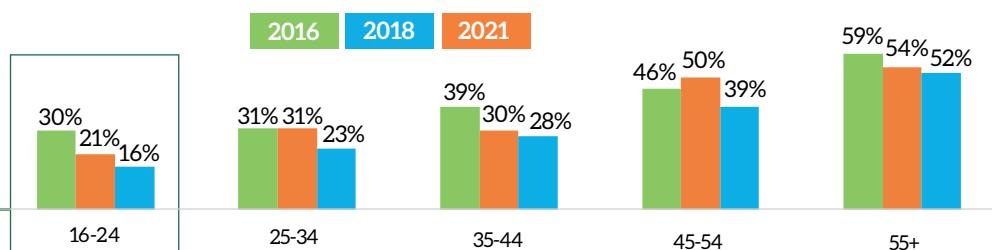
Fewer British adults see historic vehicles as heritage assets!

Whilst interest appears stable, we can also report a decline in the proportion of the British adults that see historic vehicles as part of the country's heritage (36% of adults in 2021, down from 41% in 2018, down from 45% in 2016). This has now become a trend over time which has eroded quickly.

Statement: "Historic vehicles are part of this country's heritage and we should maintain them"
National sample of GB adults (16+) / n=2,500

Young people

Survey results tell us that whilst young adults (16-24 yrs old) are the most interested in owning historic vehicles, they are also the least engaged with the heritage of historic vehicles.



LOOKING TO THE FUTURE



Originality is important in the public's view



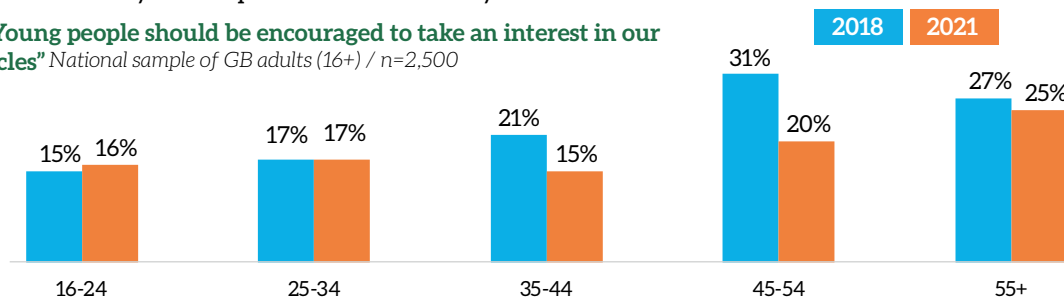
However, many adults in Britain recognise the importance of originality as shown by the 36% that think maintaining historic vehicles in their original condition is important. That is an estimated 18.7 million people and major endorsement of the good work being done by enthusiasts up and down the country, focused on their own restoration projects. It is also good to know that views have changed little since 2018 (38% agree).

At the same time, far fewer think that historic vehicle owners need to be encouraged to do so (28%, compared to 37% in 2018), perhaps indicating that many might expect museums or government schemes to protect vehicles for posterity rather than road use. That might be speculation, but the trend is open to interpretation.

There are encouraging signs if we look...

Elsewhere, our national poll results give us cause for encouragement and potential action. For example, 1 in 5 (20%) adults agree that *young people should be encouraged to take an interest in historic vehicles* and whilst younger adults may be less likely to hold this view, they do show a very stable opinion between surveys.

Statement: "Young people should be encouraged to take an interest in our historic vehicles" National sample of GB adults (16+) / n=2,500

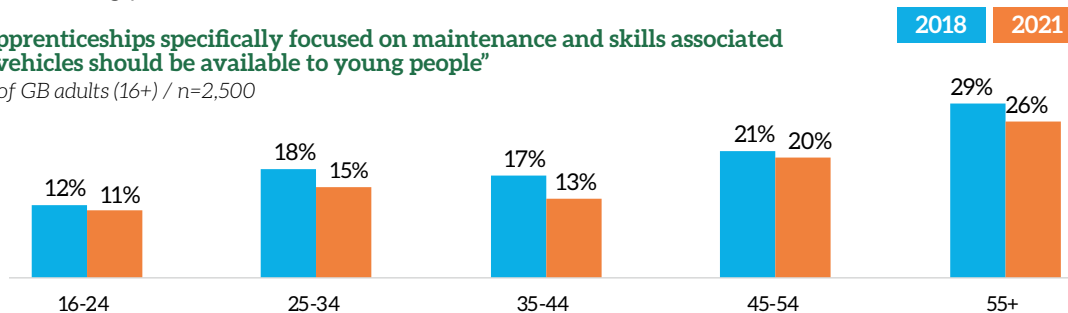


...and delivering an apprenticeship pathway appears to be well received!

A similar proportion (19%) think that *apprenticeships focused on the maintenance and skills associated with historic vehicles should be available for young people*. That's an estimated **10 million adults** many of whom would fall into the target group for skills development. This type of insight can only support the roll out of apprenticeship schemes and skills development initiatives in the coming years.

Statement: "Apprenticeships specifically focused on maintenance and skills associated with historic vehicles should be available to young people"

National sample of GB adults (16+) / n=2,500



Support for historic vehicle exemptions

When it comes to *exemptions and modifications*, many adults show sympathy towards the issues that could impact on the ability of historic vehicles to be used on the road today. Around 1 in 5 adults think that historic vehicles should be exempt from restrictions, with a similar proportion agreeing that historics should not be required to be modified to meet safety emissions standards.

National sample of GB adults (16+) / n=2,500

	2018 2021		2021 by age				
	% agree with statement	% agree with statement	16-24	25-34	35-44	45-54	55+
"Historic vehicles should be exempt from the restrictions of low and ultra-low emissions imposed on other vehicles"	21%	22%	9%	13%	13%	21%	32%
"Historic vehicles should not be required to be modified in order to meet modern safety emission standards"	19%	18%	9%	12%	14%	16%	25%

In terms of the attitude of younger and older adults, it is clear that support in these critical dimensions sits firmly with older adults (age 45-54 and 55+), and that far fewer aged under 45 share those views.

For more information on the survey, or other opportunities to get involved email research@fbhvc.co.uk
Pic credit: JDA Research





Key findings from the 2020/21 National Population Survey



1,538,927

NUMBER OF REGISTERED HISTORIC VEHICLES IN THE UK

(Up from 1,039,950 in 2015/16)



682,967

NUMBER OF HISTORIC VEHICLE OWNERS

(Up from 493,000 in 2015/16)

9.3 Million

THE ESTIMATED ADULT POPULATION INTERESTED IN HISTORIC VEHICLES

(18% of British Adults)



9%

OF ADULTS WOULD LIKE TO OWN AN HISTORIC VEHICLE

(An estimated 5.2 million British Adults)

20% Fewer

adults view historic vehicles as part of this country's heritage and therefore it is important to maintain them



1 in 5

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

(20% of British adults)



19%

The proportion of adults that agree apprenticeships specifically focused on maintenance and skills associated with historic vehicles should be made available to young people

9 Million

THE ESTIMATED ADULT POPULATION THAT THINK HISTORIC VEHICLES SHOULD NOT BE REQUIRED TO BE MODIFIED TO MEET MODERN SAFETY AND EMISSIONS

(18% of British Adults)