The Historic Vehicle Community in the United States and Canada

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Commissioned By the Historic Vehicle Association

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Acknowledgements

This study was commissioned by the Historic Vehicle Association (HVA). The HVA is an independent organization serving enthusiasts of vintage vehicles in the United States and Canada. As of the writing of this report, the HVA has more than 300 thousand members. The organization was recognized in 2009 as the exclusive affiliate in the United States and Canada of the international body Fédération Internationale des Véhicules Anciens (FIVA), a global membership organization with affiliates in 62 countries. FIVA's mission, like that of the HVA, is to "Keep Yesterday's Vehicles on Tomorrow's Roads."

The authors gratefully acknowledge the contributions of the thousands of historic vehicle enthusiasts who participated in this study – providing the information about behaviors, attitudes and passions which helped to shape the development of this report. Without their involvement, this landmark study would not have been possible.

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Executive Summary

Historic vehicles and those who appreciate them are vital to the economic and cultural life of the United States and Canada.

That is the key finding of this landmark study commissioned by the Historic Vehicle Association (HVA), the first of its kind to produce comprehensive baseline data about the historic vehicle community.

Surveys of more than 13 thousand individual enthusiasts and business owners reveal that this community is characterized by high levels of economic activity, charitable giving, cultural preservation, and political involvement. These impacts can be felt at the national level as well as within countless individual communities.

Of the estimated 2.75 million historic vehicle owners in the United States and Canada, 95 percent are male. Beyond this, however, historic vehicle enthusiasts are mainstream citizens of Canada and the U.S. There is considerable socioeconomic diversity among enthusiasts, and the typical enthusiast is of moderate income and education.

Given the moderate incomes of many historic vehicle owners, both the value of the vehicles that they own and the amount that they spend annually are dramatic. Historic vehicle owners own an average of 2.0 vehicles worth close to $25,000 each for a total value of nearly $50,000. This is quite large considering median annual income of between $75,000 and $99,999 per year. Historic vehicle owners are committed.

The annual mean spending of historic vehicle owners is more than $12,500. Applying this figure to the 2.75 million historic vehicle owners in Canada and the United States reveals total spending of nearly $35 billion in 2009. In one sector in particular – Automotive Repair and Maintenance – we estimate that the historic vehicle community represents approximately 7 percent of total spending. This is far out of proportion to the estimated 2.4 percent of the total U.S. and Canadian vehicle fleet that historic vehicles comprise.

In addition to spending by individuals, businesses serving the historic vehicle community contribute substantial economic activity as well as jobs across a number of business sectors. Initial data gathered in this study show small and stable businesses with unique technical knowledge about historic vehicles. Additional data will be forthcoming that details the extensive impact of this portion of the community.

Historic vehicle owners and enthusiasts are traditionalists. They are characterized by a high degree of personal commitment as well as understanding of the historic significance of these

vehicles. For example, they are more likely than the Canadian or U.S. norm to be married. The average enthusiast is likely to have been involved in this movement for 10 years or more. Many owners cite the historic and cultural value of historic vehicles as being very important to the decision to first own them, though "personal interest and nostalgia" is the most common reason for becoming involved in ownership of historic vehicles.

Enthusiasts in the historic vehicle movement are active in this lifestyle. More than 80 percent indicated they attended one or more historic vehicle events in 2009. Enthusiasts spent an average of 18 hours per month in 2009 watching TV, reading books and magazines, and reading online content related to historic vehicles. The vast majority (92 percent) of historic vehicle owners do at least some hands-on work on their vehicles, everything from cleaning and polishing to completing full restorations. The average historic vehicle owner spends 11.1 hours per month on this kind of hands-on work.

Historic vehicle enthusiasts and the businesses that serve them made considerable donations of time and money in 2009. We make a conservative estimate of more than $59 million in donated time that enthusiasts donated to help with fundraisers, parades, museum displays, and civic, cultural, and educational events. In addition, nearly three-quarters (74 percent) of businesses serving this community made financial and in-kind donations of greater than $1,000 in 2009.

In contrast to the many positive contributions of historic vehicle enthusiasts on the economic and cultural life of the U.S. and Canada, the environmental and infrastructure impacts of historic vehicles are quite light. The average historic vehicle was driven just 484 miles in 2009. Combined, historic vehicles accounted for only 0.08 percent of total U.S. and Canadian vehicle traffic in 2009.

Historic vehicle enthusiasts are politically active and are concerned about legislation affecting the community. They vote at a high rate – 79 percent of enthusiasts report "always" voting in regional, state and national elections. Chief among their legislative concerns is legislation regulating emissions. More than half of enthusiasts believe existing or potential emissions legislation to be very or extremely harmful to their enjoyment of historic vehicles.

Ultimately, this study is just a beginning. Additional work is needed to understand and track the considerable positive effects this community has within Canada and the U.S. Even this preliminary data, however, indicates that the historic vehicle community plays an essential role in the economy, culture and political life of Canada and the United States.

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Introduction

Study Intent

North America is where the automobile grew up. In the late 19th century, a cadre of entrepreneurs, inventors and dreamers took the raw technology of the "horseless carriage" and helped create the modern automobile. Along the way, they created vast industries, employing millions in the United States and Canada. They also transformed American culture, with significant impacts on the arts, history, and the American psyche.

Historic vehicles are the physical embodiment of this heritage. Those who keep them, work on them and preserve them understand that they are maintaining lifelines both to important times and events in their own lives as well as important eras of national history.

Today, the historic vehicle movement and lifestyle in Canada and the United States faces significant challenges. Legislation at the national and state level, often well-intentioned, regularly restricts the ability of historic vehicle owners to drive and keep their vehicles. Those who write such legislation generally do not understand the extent and importance of the historic vehicle movement in modern society.

This study is intended as a credible economic scoping report that serves to benchmark the major categories of economic activity within the historic vehicle movement. An understanding of these issues will allow both policy makers and leaders within the movement itself to have a greater appreciation for the potential ramifications of specific policies and initiatives.

This report should be read by anyone who has the ability to impact the future of the historic vehicle movement, anyone who is passionate about historic vehicles, or anyone who is curious about this critical movement in the cultural and economic life of the United States and Canada.

Research Methods

This survey depends principally on the results of two surveys conducted in the Spring and Summer of 2010 with respondents from the United States and Canada. One survey was conducted with historic vehicle enthusiasts and the other with representatives of "hobby-related businesses" (see **Terms and Definitions** below for an explanation of these terms). More than 13 thousand respondents participated in these detailed surveys. While specific claims about the statistical representativeness of findings are difficult to make, the findings are consistent with other research conducted within the historic vehicle movement and the study authors believe the results to be both accurate and meaningful.

Where possible, survey results have been validated and expanded with statistics and information compiled by national governments and respected industry groups. As appropriate, results are refined and qualified with other available survey data on the historic vehicle community.

Terms and Definitions

The following terms are used throughout this report.

Historic Vehicles – consist of cars, trucks, motorcycles, tractors, buses, military vehicles, and other motorized commercial and passenger vehicles with a model year 25 years prior to the current model year – 1985 as of the writing of this report. For the purposes of this report, boats, airplanes and other vehicles not designed to travel on roads would not be included. Not all vehicles qualify as "historic" based on age alone. Historic vehicles are generally not used as a means of daily transport and are maintained in good condition over time. More on this topic can be seen under **Key Assumptions** below.

Historic Vehicle Owners – are residents of the United States and Canada who own one or more historic vehicles. Not all of the vehicles belonging to these owners are registered.

Historic Vehicle Enthusiasts – are residents of the United State and Canada who share an appreciation for historic vehicles. They need not currently own a historic vehicle.

Hobby-related Businesses – include businesses that derive some or all of their income by providing goods and/or services to historic vehicle enthusiasts as well as trade groups and associations that support the historic vehicle movement.

Note: the geographic area of focus of this report consists of the United States and Canada. When we refer to "the study area" it is both of these countries combined.

Key Assumptions

In order to understand the impact that the historic vehicle movement has upon the economic and cultural life of Canada and the United States, we need an understanding of the size of this movement, both in terms of number of historic vehicles and number of historic vehicle owners.

Number of Historic Vehicles

An estimate of the number of historic vehicles in the United States and Canada begins with the 6.2 million automobiles with a model year of 1985 or earlier that were registered in the United

States as of October, 2009.[1] This represents approximately 2.4 percent of the total number of vehicles registered in the United States.[2]

Assuming that the same base percentage applies in Canada, then 2.4 percent of Canada's more than 29 million registered vehicles[3] would also have a model year of 1985 or earlier. Adding these 701 thousand vehicles to the U.S. total, we estimate a total fleet of approximately 6.9 million Canadian and U.S. vehicles with a model year of 1985 or earlier.

Several other factors are then applied:

- Fifty percent of these vehicles would likely not qualify as "historic" because of vehicle conditions or patterns of use[4] (e.g. a rusted early 1980's model car driven out of necessity and not preserved for the future would generally not be considered "historic").
- According to survey data, automobiles account for 81 percent of the historic vehicles owned by survey respondents. We must therefore apply a multiple to account for the historic trucks, motorcycles, tractors, commercial vehicles, etc. that make up the other 19 percent. These other types of vehicles are already accounted for in Canadian registration, so we apply this multiple only to the U.S. portion of the total.
- According to survey data, 25 percent of historic vehicles are not registered. There are many reasons why this might be so. For example, some owners keep them off the road for a period of time and therefore do not register them. Whatever the reason, we must apply a multiple to account for the historic vehicles that are not registered.

Applying these three factors, we determine that there are 5.5 million historic vehicles in Canada and the United States, of which the number in Canada is 0.5 million and the number in the U.S. is 5.0 million.

Size of the Historic Vehicle Community

The core data sets used in this analysis focus heavily on historic vehicle owners. According to the most recent survey results available[5], the average historic vehicle owner owns 2.0 historic

[1] Data from Polk.
[2] In 2008 there were 255,917,664 registered vehicles in the United States. Source: United States Bureau of Transportation Statistics
[3] 29,055,303 total registered vehicles. Source: Statistics Canada, www.statcan.gc.ca.
[4] Estimate based on opinions of experts on the historic vehicle movement. This number is a composite across all vehicles 25 years old and older, with certain makes, models, body styles and model years having very different numbers.
[5] Industry survey conducted in August, 2010 with historic vehicle owners identified within a census-balanced panel of U.S. adults.

vehicles. Using this figure, we estimate that there are 2.75 million historic vehicle owners in the United States and Canada.

As has already been remarked, a person need not own a historic vehicle to be a historic vehicle enthusiast. Proprietors of historic vehicle museums, publishers of magazines focused on the historic vehicle community, and organizers of historic vehicle shows and events all attest that large numbers of men, women and children are historic vehicle enthusiasts without owning vehicles. Some are past owners, some are future owners, and some just have a strong appreciation for these vehicles and what they represent. The size of this broader community may be many times larger than the 2.75 million estimated owners, but sufficient data to make a specific estimate is not currently available.

Note: Throughout this report we use the term "historic vehicle enthusiasts" to represent the respondents who participated in this survey. While it is true that essentially all of the survey respondents are "enthusiasts," it is difficult to estimate the degree to which these findings are purely representative of historic vehicle enthusiasts as a whole.

Research Findings

1. Historic Vehicles in the United States and Canada

The typical historic vehicle enthusiast in the United States and Canada is male, middle-aged, married and of moderate economic background. He is a traditionalist who is more likely than the norm to be married and is committed to preserving his country's automotive heritage. He is most likely to own a single postwar classic or muscle car, though his interests might extend to many other classes and types of vehicles. His car might be worth a considerable percentage of his annual salary, which is just one of many measures of his level of passion for this lifestyle.

Enthusiast Demographics

Though it is predominantly male, the historic vehicle community consists of enthusiasts from a wide range of cultural and socioeconomic backgrounds.

- 95 percent of historic vehicle enthusiasts are male, though there is certainly an active minority of female enthusiasts.

- Enthusiasts are more likely than the U.S. or Canadian norm to be Caucasian, though there is significant representation of all major ethnic groups.

- The mean (average) age of enthusiasts is 54.8 years old. 65 percent are between the ages of 45 and 65.

- Some enthusiasts entered the community quite young, learning to appreciate historic vehicles well before they can drive. While on the other end of the spectrum, many enthusiasts continue to enjoy historic vehicles well into their 80s and 90s.

- 80 percent of historic vehicle enthusiasts are married, which is far higher than the U.S. average of 49 percent[6] or the Canadian average of 48 percent[7]. This is one example of a defining characteristic of these enthusiasts – traditionalism. As will be shown in subsequent sections, this traditionalism extends into the motivations of historic vehicle enthusiasts and their involvement in philanthropic activities geared toward preservation.

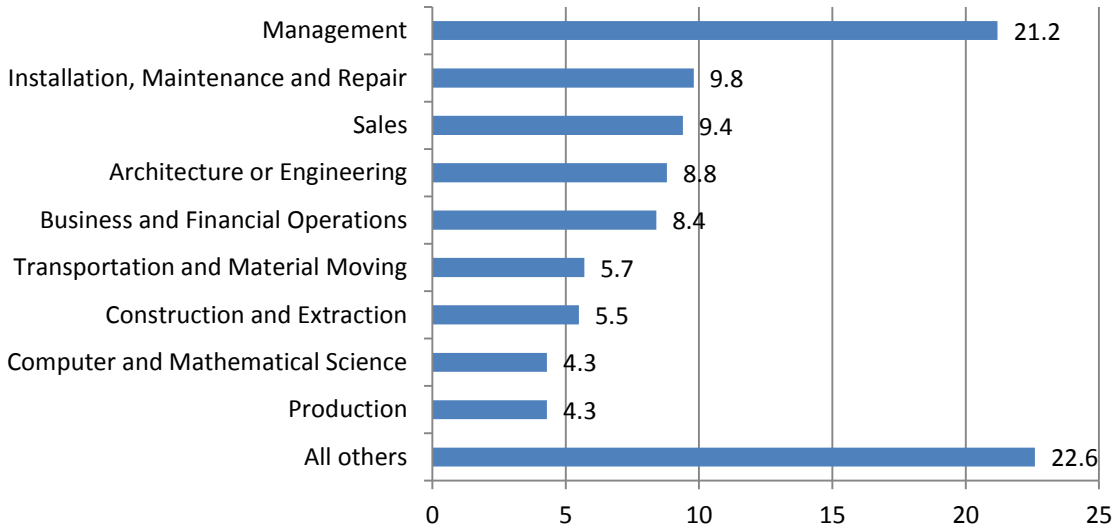
[6] United States Census Bureau, *2009 American Community Survey*
[7] Statistics Canada, *2006 Census*

- There is considerable socioeconomic diversity among historic vehicle enthusiasts. Median household income is between $75,000 and $99,999 per year, which is higher than the 2009 U.S. national median of $ 50,221[8]. This may partially be explained by the relatively higher mean age of enthusiasts and the greater propensity to be married[9]. Although there are some enthusiasts with considerable annual income, the norm is far more moderate. 49 percent have annual household income below $100,000 and 17 percent have annual household income below $55,000.

- Education level varies considerably. A large percentage (56 percent) of enthusiasts have college degrees, which is greater than the U.S. average of 35 percent[10] or 50 percent of the Canadians with college or trade certifications or university degrees[11]. On the other end of the spectrum, a fairly large number (18 percent) have no more than a high school education.

Most historic vehicle enthusiasts work full time. As Table 1 shows, many are involved in either business or technical careers. Roughly one in five historic vehicle enthusiasts (20.5 percent) consider 50% or more of their daily tasks within their occupation to be related to the automotive industry.

Table 1 - Occupation (%) of Historic Vehicle Enthusiasts (HVA Commissioned Economic Impact Study)



[8] United States Census Bureau, *2009 American Community Survey*
[9] Median household income for Americans between the ages of 45 and 64 is $61,354; for married couple families is $72,865. Ibid.
[10] United States Census Bureau, *2009 American Community Survey*
[11] Statistics Canada. *Labour Force Historical Review*. Ottawa: Statistics Canada, 2007.

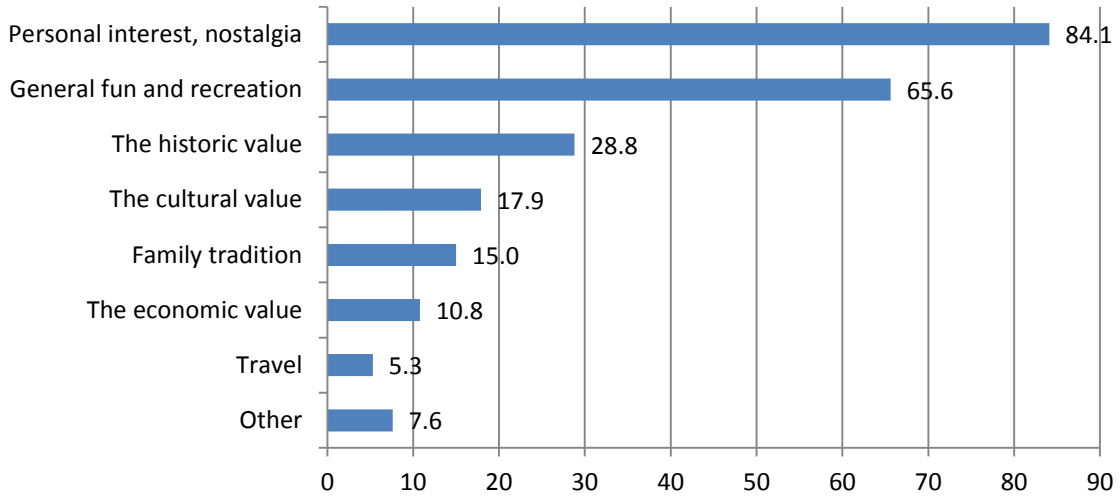
Motivations

The reasons why historic vehicle enthusiasts are engaged in this community vary from highly personal to more philanthropic.

As Table 2 shows, for those who own historic vehicles, the most common reason for ownership is a sense of personal nostalgia. 84 percent indicate that "personal interest and nostalgia" caused them to first become involved in owning historic automobiles. When indicating the factor most important to their ownership today, the most common response is "Personal nostalgia - these vehicles remind of or connect me to an important time in my own life." In verbatim comments, many owners of historic vehicles indicate they own cars that were central to important phases of their lives – when they were in high school, when they enlisted in the military, etc. Some have kept these vehicles in good condition since those important times; others have sought them out in the years since.

Table 2 - Motivations (%) of Historic Vehicle Owners (HVA Commissioned Economic Impact Study)

"What first compelled you to begin collecting historic vehicles?"



Owning and appreciating historic vehicles is fun. Two-thirds (66 percent) of historic vehicle owners indicate that "general fun and recreation" was an important initial motivator causing them to first become involved in this lifestyle. For many, the ownership of and appreciation for historic vehicles is a highly social activity. They work on cars together, travel together to shows and rallies, get together for weekend drives, and exchange information with other enthusiasts online. More on these topics can be found in section **4: Engagement**.

Also important is a sense of historical appreciation. "The historic value" played a role in first compelling 29 percent of owners to own historic vehicles. Also important, 18 percent indicate "the cultural value" was significant and 15 percent say that this is "family tradition." For many, owning, maintaining and restoring historic vehicles is related to "protecting these vehicles for generations to come." Their philanthropic activities in support of this historic sense are detailed in section **4: Engagement**.

For many in the historic vehicle community, participation in this community is a long-term commitment. A solid majority (65 percent) of enthusiasts have been involved for more than 10 years.

Patterns of Ownership

While a handful of historic vehicle enthusiasts like Jay Leno own large private collections, the majority (54 percent) of owners have a single vehicle. The typical owner of historic vehicles owns an average of 2.0 vehicles. The mean (average) value per vehicle is approximately $25,000. By extension, the mean value of an individual owner's collection is $50,000. This represents a significant proportion of the average household income of a historic vehicle enthusiast. The historic vehicle community is made up of committed individuals.

The most common types of historic vehicles owned by enthusiasts are "Post-war Classics" (e.g. Chevrolet Bel Air, Volkswagen Beetle) and "Muscle Cars" (e.g. Plymouth Barracuda, Pontiac GTO). However, large numbers own and maintain sports cars, antique cars, limited production exotic vehicles, antique trucks, kit cars, vintage motorcycles, vintage tractors, modified vehicles (including hot rods, lowriders and tuner cars), military vehicles, and specialized commercial vehicles (e.g. busses, fire trucks, and hearses). The vehicles vary widely.

One quarter (25 percent) of historic vehicle owners own one or more vehicles that are not registered. These may be vehicles under active restoration, may be "parts cars" that are being used to supply parts and materials for other vehicles, or may not be registered for some other reason.

Overall, the condition of historic vehicles is typically good or better. On a rating scale from "concours" (best) to "fair" (worst), 75 percent of vehicles were rated as concours, excellent or good. As seen in section **4: Engagement**, historic vehicle enthusiasts spend considerable time, energy and money on maintaining and restoring these vehicles.

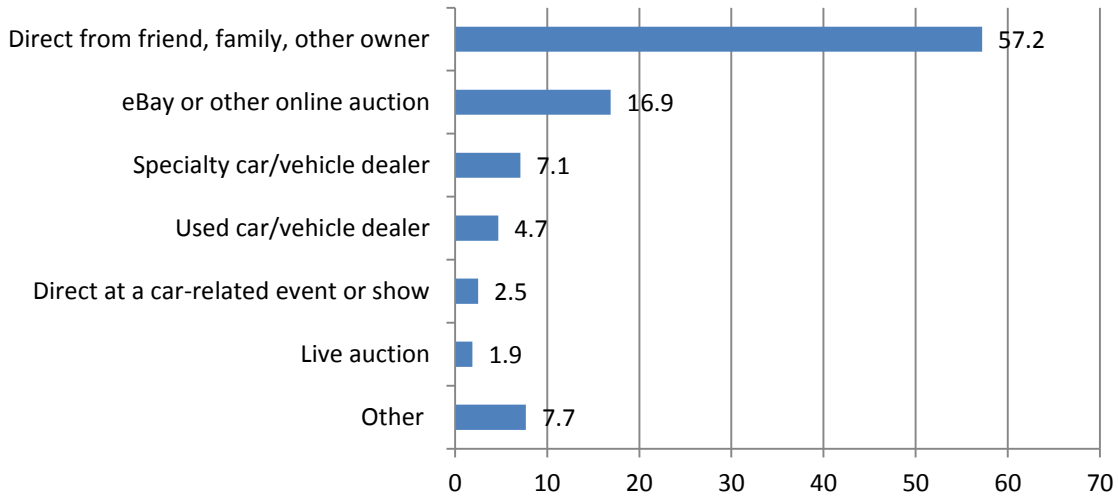
Buying Practices

Most (90 percent) historic vehicle owners purchased their vehicle(s); the remainder received their vehicle(s) as gifts or family heirlooms.

The majority (56 percent) of respondents indicate they have purchased one or more historic vehicles within the past five years. While high profile auctions are very visible in the public eye, Table 3 shows that fewer than 2 percent of respondents indicate they purchased their vehicle through live auctions. Instead, these vehicles were most often (57 percent) purchased directly from a friend, family member or other historic vehicle owner, while 16.9 percent were purchased through eBay or other online auction, 7 percent from a specialty vehicle dealer, and 5 percent through a used car/vehicle dealer.

Table 3 - Purchase Channels for Historic Vehicles(HVA Commissioned Economic Impact Study)

"Through which of the following did you purchase your vehicle?" (2006-2010)



Of current owners of historic vehicles, 27 percent indicate either that they will purchase another historic vehicle within the next two years or that this is a strong possibility.

2. Economic Impact

As was shown in section **1: Historic Vehicles in the United States and Canada,** historic vehicle owners spend considerable sums, relative to personal income, in support of this lifestyle. For this reason, the historic vehicle movement in the study area has considerable economic impact. This happens at many levels. Enthusiasts, historic vehicle owners and hobby-related

businesses all make significant and ongoing expenditures in support of their appreciation of historic vehicles.

Economic Impact of Enthusiasts

The average historic vehicle owner spent the following in 2009:

$8,770	Restoration, repair and maintenance, including parts, materials and payment for services rendered at restoration and repair shops
$1,600	Purchase of actual historic vehicles[12]
$1,005	Magazines, books, DVDs, models, museums, posters, seminars, tools, clothes, and automotive memorabilia
$698	Travel to historic vehicle shows and events[13]
$557	Registration and insurance
$35	Club/Association dues and fees
$12,664	**TOTAL**

Applying this figure to the estimated 2.75 million historic vehicle owners in Canada and the United States[14] reveals total spending of nearly $35 billion in 2009.

The most significant category of spending by historic vehicle owners is restoration, repair and maintenance. Many historic vehicles are acquired in relatively poor condition. Historic vehicle enthusiasts spend considerable time and resources to restore them to good or better condition and then to maintain them at that level.

The average historic vehicle owner spent $2,734 at professional auto shops in 2009 on restoration and repair work. Multiplying this result by the 2.5 million historic vehicle owners in the United States shows that this community spent $6.5 billion with U.S. automotive repair and maintenance shops. In 2007, the Automotive Repair and Maintenance sector had receipts and revenue of $85.8 billion[15]. Thus, the historic vehicle community represents approximately 7 percent of total spending in the Automotive Repair and Maintenance sector. Since registered

[12] 17.5 percent of all historic vehicle enthusiasts reported buying or selling a historic vehicle in 2009. The average price was $18,260. We multiply by a factor of 0.5 to avoid double counting individual sales. The total of 17.5% x $18,260 x 0.5 is $1,600.

[13] 82,2 percent of all historic vehicle enthusiasts reported attending at least one event in 2009. Among these, average expenditures on hotel, transportation, food and beverage, admission to historic vehicle related events, and fuel costs averaged $849. This sum multiplied by 82.2 percent equals $698.

[14] Analysis of data from United States Bureau of Transportation Statistics, Statistics Canada, ACCUDATA 2006, and Polk. Please see "Key Assumptions" for a walkthrough of analysis.

[15] United States Census Bureau, *2007 Economic Census*, NAICS Code 8111: Automotive repair and maintenance

vehicles with model year 1985 and earlier make up just 2.4 percent of all registered vehicles, this spending is well above the average.

Historic vehicle enthusiasts are philanthropic. 39.5 percent attended a charity event featuring historic vehicles in 2009. More than half (52 percent) indicate that they donated their time and vehicles to community events (fundraisers, parades, museum displays, civic, cultural, educational events) in 2009. Assuming the average value of a volunteer hour is $20.85[16] and the average enthusiast donates two hours of his or her time, the 2.75 million historic vehicle owners in the United States and Canada donated more than $59 million of donated time in 2009. Note: this amount does not include the considerable amounts that historic vehicle events often raise and donate to charitable causes annually. The Historic Vehicle Association intends to initiate additional research to measure these sums.

Economic Impact of Hobby-related Businesses

Businesses serving the historic vehicle community are engaged in a variety of different business activities. This range of activities includes, but is not limited to:

- Manufacturers and reconditioners of parts, components or accessories
- Auto dealers specializing in specialty and/or used vehicles
- Organizers of shows, races and events
- Restoration, repair, paint and maintenance shops
- Automotive museums
- Providers of insurance, roadside assistance, storage, financing and other services focused on owners of historic vehicles
- Publishers of books, magazines and other publications focused on historic vehicles
- Media companies, production companies, and others involved in historic vehicle programming on TV and radio
- Trade groups and associations that support the historic vehicle movement

The majority of these are small businesses, with more than 70 percent indicating they have five or fewer full time employees and 48 percent indicating annual revenues of $250 thousand or less.

Many of these businesses and their employees have unique technical knowledge about historic vehicles, as well as their repair, maintenance and restoration. A strong majority (85 percent)

[16] Independent Sector (www.independentsector.org) using average hourly earnings of all production and nonsupervisory workers on private nonfarm payrolls (as determined by the Bureau of Labor Statistics).

indicate that it is extremely or somewhat difficult to find staff and/or volunteers with the skills and experience required to work for their business, group or association.

A large number of these businesses make substantial charitable contributions. Nearly three-quarters (74 percent) made financial and in-kind donations of greater than $1,000 in 2009 with average annual sum of philanthropic giving of more than $10,000.

Note: more in-depth, follow up research is needed to develop a truly accurate picture of the economic impact of these businesses.

3. Patterns of Use

The impact of historic vehicles on roads and environments is light. Many historic vehicle owners drive their vehicles rarely if at all. When they do take these vehicles out on the road, historic vehicle owners are most likely to keep trips short. As a result, the share of total vehicle miles driven in the United States and Canada that is accounted for by historic vehicles is exceedingly small.

Driving Frequency/Occasions

The average historic vehicle owner drives his historic vehicle(s) 30 times per year, or roughly 2-3 times per month. Since owners own an average (mean) of 2.0 historic vehicles, this equates to 15 times per year per vehicle, or just over once per month.

Driving Miles

The majority (60.8 percent) of historic vehicles were driven 300 miles or less in 2009, and only 3.2% of historic vehicles were driven more than 2,100 miles in this same period. Assuming that the average vehicle at the high end (i.e. driven more than 2,100 miles) was driven 3,000 miles, the average historic vehicle was driven 484 miles in 2009. Multiplying this figure by the estimated 5.5 million historic vehicles in the United States and Canada reveals that historic vehicles travelled 2.7 billion miles in 2009. Comparing this to the more than 3.3 trillion total vehicle miles driven in the United States and Canada[17] reveals that historic vehicles account for less than a tenth of a percent (0.08 percent) of total vehicle traffic in the study area.

[17] 2,973,509,000,000 total highway miles were travelled in United States in 2009 (Source: United States Bureau of Transportation Statistics). Assuming that the figure in Canada is proportional to relative number of automobiles, we estimate total Canadian highway miles travelled to be 337,593,754,248 miles and total U.S. and Canada combined highway miles to be 3,311,102,754,248 miles. Note: this does not include travel on secondary roads or surface streets and is therefore conservative.

4. Engagement

Owners of historic vehicles are highly invested in the movement and they spend a considerable amount of time both furthering their own knowledge and sharing their appreciation for historic vehicles with others. They directly organize as well as support a large number of cultural events and institutions. The motivation behind such activities is often philanthropic and many of these events provide significant benefits to local communities. The cultural impact of this group is great.

Clubs

An important aspect of the historic vehicle experience for many enthusiasts is membership in clubs and associations. Close to one-half of respondents (48%) report belonging to at least one historic vehicle club or association. Other recent studies suggest that this number is somewhat smaller, but historic vehicle clubs and associations are core for many enthusiasts.

Experts on the historic vehicle movement with access to club and association databases estimate that there are 15 thousand historic vehicle clubs and associations in the United States.

The reasons for joining historic vehicle clubs and associations are diverse. Of the reasons that respondents indicate were most important to their decision to join clubs and associations, there is balance among informational (71%), social (67%) and technical assistance (66%). In other words, the club experience allows historic vehicle owners to both learn more about their vehicles and to enjoy the company of other enthusiasts.

Also important is support of the movement itself. 57% of respondents indicate that support of the historic vehicle movement was an important reason for joining historic vehicle clubs and associations. For more on the specific concerns and priorities of historic vehicle enthusiasts, see section **5: Political Life**.

Vehicle Shows and Events

Another important aspect of the historic vehicle experience is attending events, many of which incidentally are organized by historic clubs and associations. Most (82 percent) enthusiasts indicate they attended one or more events featuring historic vehicles in 2009. The majority (58 percent) of enthusiasts attended three or more such events in 2009. These events happen throughout the year all over Canada and the United States. They range from high-profile events in highly selective venues to rallies of small groups of friends meeting in parking lots to go for monthly "cruises."

Of those who attend historic vehicle events, the most common type is the local/community car show. Nearly 90 percent of those who attend shows went to this type of event in 2009. At a typical event of this type, historic vehicle owners would display their vehicles while other historic vehicle enthusiasts and the general public move through, learning about the vehicles and asking questions.

These are generally community events, suitable for all audiences. A key priority for the enthusiasts who attend events is that they be 'family-friendly.' 45 percent of respondents indicated this was of primary importance to their decision of which events to attend.[18]

A large number (40 percent) of those who attended events in 2009 attended one or more charity events. These events typically raise both money and awareness for local and national causes.

Other common types of events attended by those who attend events include exhibits or annual car shows (81 percent) and club meetings (36 percent).

A much smaller number of historic vehicle enthusiasts attend or participate in races of historic vehicles. Of those who attended events in 2009, 8 percent indicate they attended one or more off-road competitive events and 7 percent indicate they attended one or more on-road competitive events.

Museums

Also important to the historic vehicle movement are historic vehicle museums. These museums devoted to historic vehicles are scattered throughout the U.S. and Canada. Many of these were originally large private collections which are now open to the public. In addition to housing, maintaining and restoring the actual vehicles, many museums devoted to historic vehicles also host events and offer interpretive and educational programming. 37 percent of historic vehicle owners attended at least one museum within the past two years.

Hands-on Work

The vast majority (92 percent) of historic vehicle owners perform at least some hands-on work on their own vehicles. We have already seen in section **2: Economic Impact** that

[18] Top 2 Box importance - 4 or a 5 on a 5-point importance scale with 5 indicating 'Extremely important' and 4 indicating 'Very important'

historic vehicle enthusiasts spend considerable sums on maintenance, restoration and repair. They also get their hands dirty.

The average historic vehicle owner spends 11.1 hours per month doing hands-on work on his or her historic vehicles.

The most common tasks are washing, polishing and waxing these vehicles, as well as performing standard maintenance like oil changes. However, large numbers are also adding and replacing parts, performing detailed electrical work, repairing body damage and corrosion, doing major engine work, etc.

In addition, the majority of historic vehicle owners (55 percent) have at one time or another restored a historic vehicle, either doing the work themselves or hiring it out.

A smaller but also significant number (35 percent) have at one time or another significantly modified a historic vehicle for performance, speed or appearance. In building hot rods, lowriders, tuner cars and other modified vehicles, these historic vehicle owners have helped to advance the highly North American art form of creating modified vehicles.

Consumption of Media

Historic vehicle owners are hungry for information.

They are interested in technical specifications and plans, the selling price of vehicles of the same year and model as theirs, current news from within the historic vehicle movement, pending legislation, etc.

To satisfy this appetite for information, they turn to a variety of media sources. The average historic vehicle enthusiast spent the following number of hours per month engaged in the indicated activities related to historic vehicles:

6.3 hours	On the web/internet related to interest in historic vehicles (not including social networking)
1.9 hours	Social networking
4.9 hours	Watching television programs related to historic vehicles
4.9 hours	Reading books or magazines related to historic vehicles
18.0 hours	**TOTAL**

Although some media outlets, web sites, and publications offer content which is interesting to all historic vehicle enthusiasts, many enthusiasts with particular interests (e.g. World War II vehicles, Pontiacs, Hot Rods) seek specialized content that is specific to their needs and passions. For this reason, the historic vehicle movement supports a wide and diverse array of television programs, magazines, publishers, and commercial and non-commercial web sites.

5. Political Life

Owners of historic vehicles are actively engaged in shaping policy that affects the historic vehicle community. They regularly participate in local, regional and nation-wide elections. They have several active concerns about pending or potential legislation and policy which may impact this community.

Voting

A significant majority (79.1 percent) of historic vehicle enthusiasts reported "always" voting in regional, state, and national elections. This is significantly higher than the 56.8 percent voter turnout in the United States[19] and 58.8 percent voter turnout in Canada[20] in 2008 and even higher than the typical U.S. turnout in non-presidential election years (37.1% in the US in 2006[21]). Coupled with the 16.8 percent of historic vehicle enthusiasts who "sometimes" vote in regional, state, and national elections, this is a politically invested group.

Other recently collected data indicate that political engagement of historic vehicle enthusiasts around issues related to the community is on the rise.

[19] Source: 2008 election results: http://elections.gmu.edu/Turnout_2008G.html
[20] Source: Elections Canada: www.elections.ca
[21] Source: 2008 election results: http://elections.gmu.edu/Turnout_2008G.html

Concerns and Priorities

The specific legislative concerns of historic vehicle enthusiasts are summarized below. In each case, the percentage indicates the proportion of respondents who believe a particular kind of potential or existing legislation to be very or extremely harmful to their enjoyment of historic vehicles.

54.6%	Emissions
50.1%	Restrictions on timing or amount of use
49.1%	Alternative fuels
38.3%	Inoperable vehicle ordinances

Emissions laws are designed to restrict the particulate emissions of all vehicles within a given geographic area.

Restrictions on timing or amount of use generally single historic vehicles out and restrict the conditions under which these vehicles can be driven.

Alternative fuels such as ethanol can cause significant damage to older engines.

Inoperable vehicle ordinances are designed to restrict visible inoperable automobile parts and bodies.

Much of this legislation is well-intended, with no specific intent to harm owners and enthusiasts of historic vehicles. However, the impact can be quite severe and onerous, which may explain the increasing engagement of historic vehicle owners in legislative affairs.

Next Steps

Ultimately, this study serves as no more than a starting point to understanding the role of the historic vehicle community in the United States and Canada.

The study has revealed that historic vehicle enthusiasts are active and committed and that they play an important role in economic, cultural and political spheres of their respective communities. This baseline data was critically lacking and should help to inform decisions affecting historic vehicles going forward.

Follow up studies, particularly as relates to the impacts of hobby-related businesses and charitable giving of historic vehicle clubs, events, businesses and individuals, is certainly needed and will help us all understand the tremendous role this movement has on our modern life.