



University of Brighton



ECONOMIC IMPACT
OF THE
BEAULIEU INTERNATIONAL AUTOJUMBLE
ON
THE NEW FOREST AREA

Beaulieu

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MARCH 2013

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FOREWORD

by Lord Montagu of Beaulieu



As President of the Federation of British Historic Vehicle Clubs (FBHVC), I was privileged to host a reception in the House of Lords in December 2011 where the results of a nationwide survey of the British historic vehicle movement were announced. This survey, undertaken by FBHVC in conjunction with the Historic Vehicle Research Institute, showed that the hobby of preserving and using historic vehicles generates over £4 billion turnover for the British economy each year and supports employment for over 28,000 people.

Knowing that the team involved had also done an economic impact study on the 2010 London to Brighton veteran car run showing it created over £1 million of economic benefit to the City of Brighton and Hove, I took the opportunity to ask if they might undertake a similar exercise to see how much of a contribution the annual Beaulieu International Autojumble makes towards that overall £4 billion total – and, more importantly, to the local economy.

The concept of the Autojumble was – and is – very simple: it provides a forum for the exchange of vehicle related items which might otherwise never be made available to those who need them. As one journalist said after an early event – “if you cannot find it at Beaulieu, you will not find it”.

This report into one weekend’s activity shows how that simple idea from over 40 years ago has developed and grown in to a significant annual event that both supports the needs of the historic vehicle community and provides substantial benefit for the local economy. It is an event of which we at Beaulieu are very proud.



THE STUDY AREA



Our research area, indicated on the map above, is a 15 mile radius from Beaulieu limited by the Solent, the River Test and Southampton Water. This area includes most of the New Forest National Park (shown in green) and about 90% of the area controlled by the New Forest District Council in Hampshire. It also includes Christchurch in Dorset, which is the largest town in the study area. The area has a low population (approximately 200,000) and the only significant industrial employment is to be found at the Fawley refinery. The principle activities are agriculture, forestry and tourism.

The Beaulieu Estate is situated within the National Park. Its history goes back to the foundation of a Cistercian monastery in the reign of King John in 1204. After the dissolution of the monasteries in the 16th century, the Abbey was partially demolished and the lands sold to Sir Thomas Wriothesley, a well-connected courtier to Henry VIII and an ancestor of Lord Montagu.

The Estate covers approximately 7,000 acres, of which 2,000 is used for forestry and 3,200 for agriculture. There are 126 homes and 57 commercial properties, but the Estate is best known for the operation of its visitor attractions – the National Motor Museum, the 13th century Palace House and gardens, the Abbey ruins and the maritime museum at Buckler's Hard on the Beaulieu River (the only privately owned estuary in the country) where much 18th century ship-building took place.

The Beaulieu Estate has always been a significant contributor to employment in the area. The increasing mechanisation of land management since the second world war means the Estate land now needs a fraction of the number employed in 1945, but diversification into other areas, especially the motor museum that is now a national institution owned by a charitable trust, means that activity on the Estate results in direct employment for over 200.

INTRODUCTION

The Beaulieu International Autojumble (referred to as the BIA in this report) is one of the longest running events held at the Beaulieu Visitor Attraction. The Montagu Motor Museum as it was first called was founded in 1952 by Edward Douglas-Scott-Montagu, third Baron Montagu of Beaulieu. The museum initially held just five cars and a small collection of automobilia which were displayed in Palace House, Lord Montagu's ancestral home. As the collection grew and became more popular it could no longer be accommodated in Palace House and was transferred to a series of temporary wooden buildings in the grounds.

Such was the reputation of the collection and the Palace that in 1959 almost 300,000 visitors came to Beaulieu. By 1964, visitor numbers exceeded half a million. The wooden sheds which had been the home of much of the collection could no longer accommodate this influx of visitors and a purpose-built museum designed by the architect Leonard Manasseh was constructed in the grounds. The renamed 'National Motor Museum' was opened by the Duke of Kent on July 4, 1972.

It was this period of transition in the late 1960s that saw the genesis of the 'International Autojumble'. The first Beaulieu 'Autojumble' took place on Sunday 17 September 1967, in a field within the Beaulieu Visitor Attraction that had been set aside for events. It was open from 1100 to



1700 and was billed as "a grand event for the buying, selling and swapping of spare parts, accessories and other desiderata for motorcars and motorcycles of all ages." The aim was to "provide a market-place in which both private enthusiasts and the trade will be able both to dispose of surplus items useful to other restorers, and to buy what they themselves require." The only restriction on items for sale was that they were to be "clearly connected with motoring or motor cycling, and that there must be no complete vehicles offered for sale."

Scenes from the first ever "Autojumble"

Michael Ware, the then director of the Montagu Motor Museum, was looking for an appropriate name for such an event. The by then famous Hershey "swap meet" had been running in Pennsylvania since 1954 but swapping was not the main activity envisaged at Beaulieu. The term flea market was not widely used at the time, and didn't really fit the bill, but toying with expressions like jumble sale for motorists, Michael hit on "autojumble" and a new word – it now has a place in the Oxford English Dictionary – was born. Today autojumbles can be found all over the world.



The 1967 event was advertised in magazines like *Veteran and Vintage* and *Motor Sport*. Sellers were able to hire a pitch with a table and two chairs, while visitors paid half a crown to enter. Unfortunately for both, it rained heavily some of the time but this did not affect things unduly. That first event attracted 76 stalls and 4,933 visitors. Unlike today's huge Beaulieu autojumbles only three of the stalls belonged to full time professional traders, most were motoring enthusiasts who were clearing out their garages.

The event quickly gained in popularity. By 1969 it could boast its first American stallholder along with 200 other traders. By 1976 the first automart of complete cars was held and the event attracted 14,000 visitors. By 1980 it was so large that it was no longer practical to hold the event on one day and the autojumble became a weekend event with 1,286 stalls. Since this time it has generally been held on a weekend early in September.



The 2012 event, the subject of this report, was the 46th Beaulieu International Autojumble and had the benefit of ongoing support from *Classics Monthly* magazine. Taking place between 7–9 September, it had over 2,400 stalls and automart/dealermart pitches with headline visitor numbers exceeding 38,000. The rules on what may, or may not, be sold in the autojumble area remain much as in the early days – items must have a transport connection, and complete vehicles may only be sold from an automart or dealermart pitch.

METHODOLOGY

In order to assess the financial impact of the annual BIA the Federation of British Historic Vehicle Clubs and the University of Brighton conducted an assessment of the 2012 event. Three avenues of enquiry were pursued:

- The event organisers were asked about the income and expenditure for the event and the numbers of people involved in various activities.
- A team from the University of Brighton questioned members of the public attending the event in order to determine their expenditure both at the event and elsewhere within the study area (see map on page 2). 698 usable responses were collected.
- Stallholders and exhibitors were invited to complete the same questionnaire, either on paper or electronically. This yielded 236 usable responses.

In addition to enquiring about expenditure, the questionnaires requested background information about frequency of attending, type and location of accommodation (if not staying at home), age bracket, location of normal residence, historic vehicle and other heritage-related interests.

Anomalous and contradictory responses were ignored. The results were analysed and extrapolated to provide the figures contained in this report. Care was taken to avoid double counting.

RESEARCH FINDINGS

About the people attending the International Autojumble in 2012

The BIA is open to the public for two days over the weekend, but there is an additional day (Friday) to enable stallholders to set up their displays.

This means that for traders and exhibitors, it is a three-day event, necessitating staying at least two nights locally if it is impractical to commute.

The headline number of 38,356 people/day attendances at the 2012 BIA provided by the organisers includes traders as well as members of the public.

Most traders are there for three days and many members of the public attend two days.

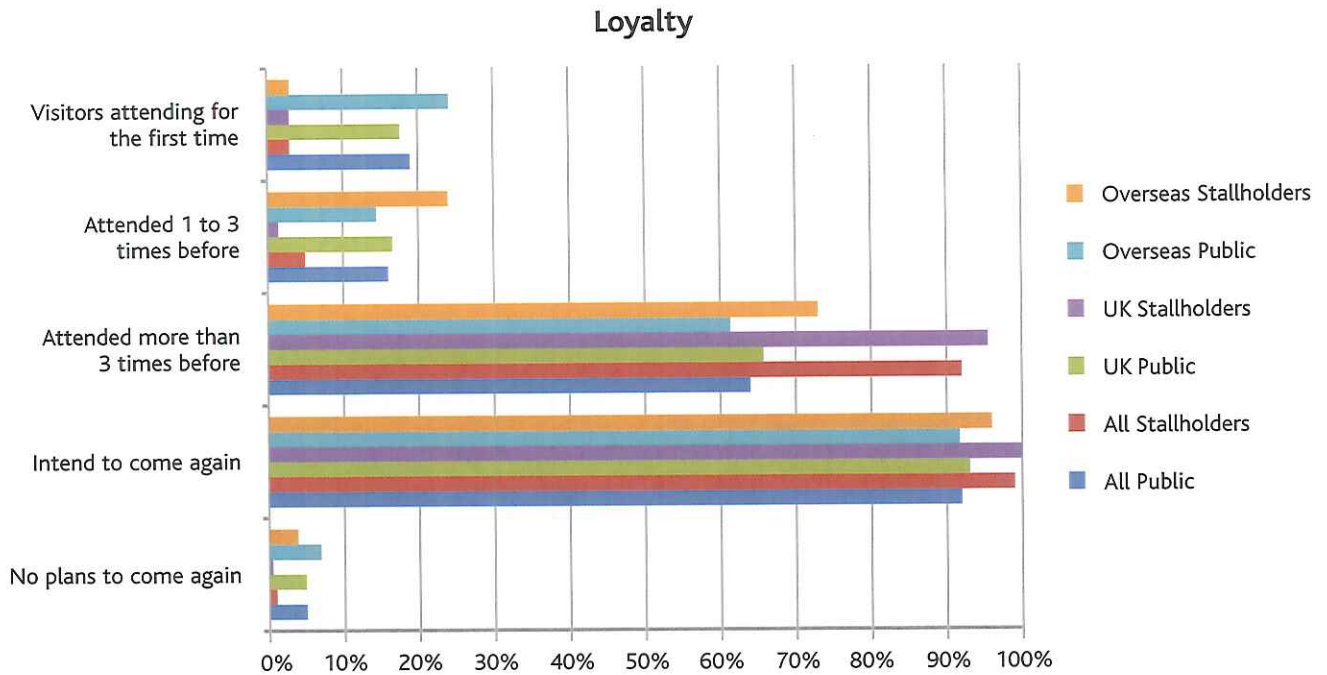
Confidential data from Beaulieu provided accurate figures for the tickets/passes issued that enabled the researchers to produce the analysis that follows.



Loyalty

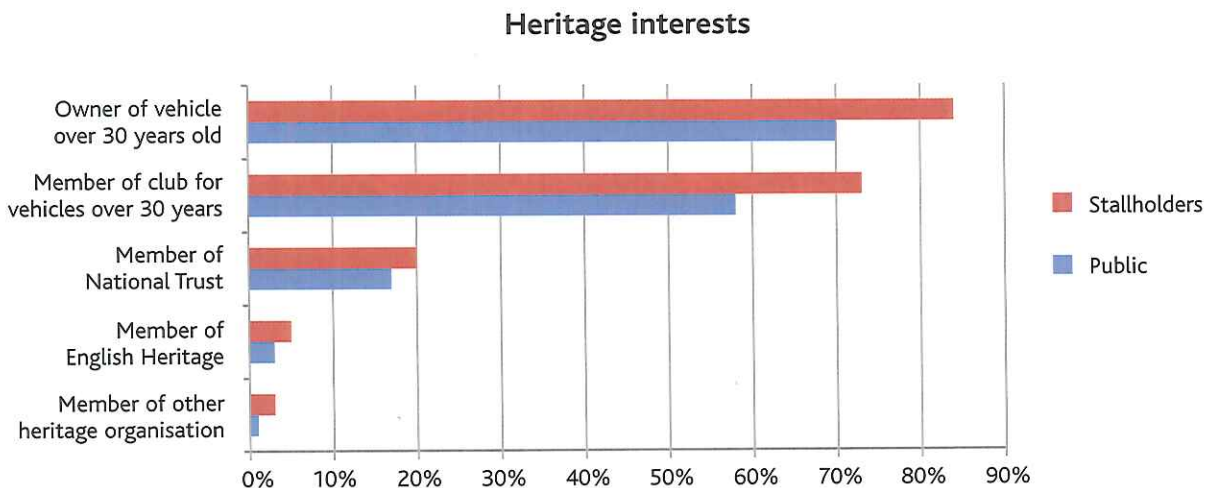
Successful annual events attract a following of people who attend as a matter of course. The BIA is no exception, but the degree of loyalty, with over 60% of all respondents having attended more than three previous events, and a staggering 90% saying they intend to return, is remarkable.

The balance between the different categories of attendees is shown on the chart below – just as remarkable as the high proportion of attendees intending to return is the fact that all overseas traders but one said they intend to return – and the one simply hadn't answered that question.



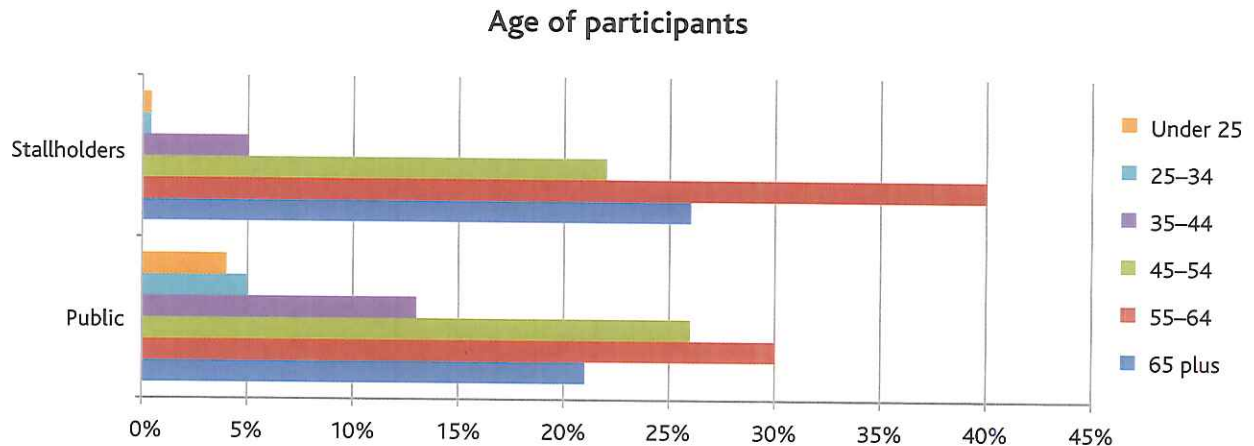
Historic vehicle and other heritage interests

There was no surprise in finding that a majority of those attending had a strong interest in historic vehicles, as demonstrated by the number who own such vehicles or belong to clubs catering for historic vehicle interests, but the extent of wider interest in heritage matters (as indicated by membership of organisations such as the National Trust and English Heritage) is more than double what would be expected from the general population.



Ages of respondents

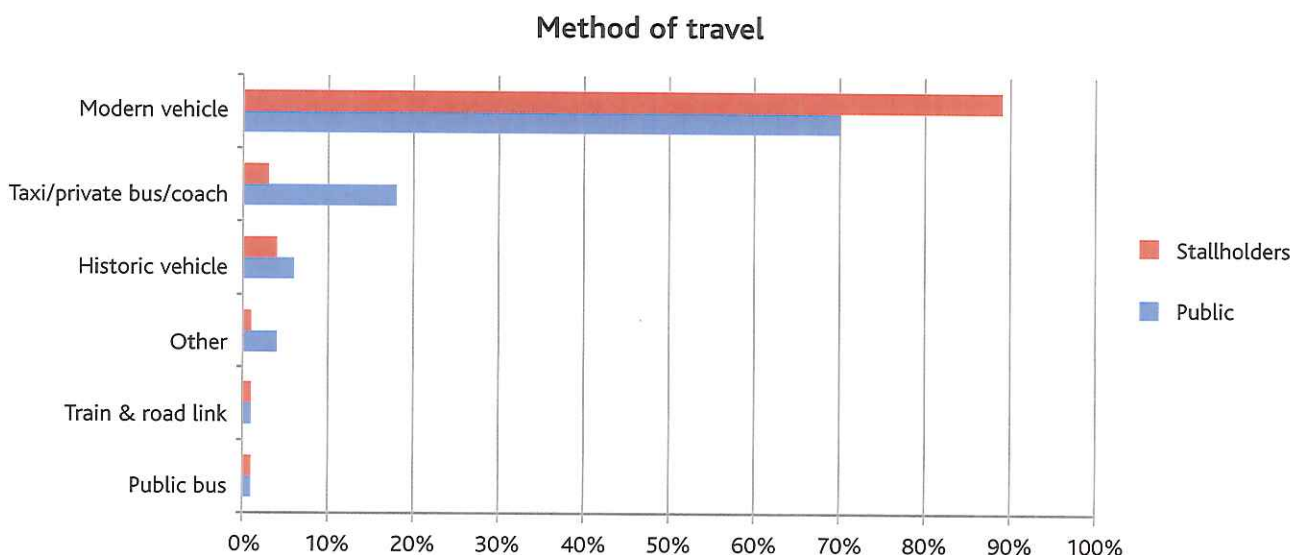
Using slightly different age brackets, the 2011 national survey of the historic vehicle movement found that 55% of historic vehicle owners are aged under 60. The age distribution for the public attending the BIA is of a marginally younger population, while that for stallholders is slightly older, which is precisely what one would expect: younger enthusiasts are still acquiring parts, tools and equipment to sustain their hobby, while those who have been involved for many years are more likely to be disposing of their surplus paraphernalia.



Method of travel

The nature of the BIA means that it can be impractical to use a treasured older vehicle to get there. Stallholders bring often dirty and bulky items for disposal while those who purchase these items then have to take them away, so it is hardly surprising that nearly 90% of traders and 70% of the public arrived at Beaulieu in a vehicle that is less than 30 years old. Although over 80% of stallholders own historic vehicles, only 6% used them to attend Beaulieu, a pattern matched almost exactly by public attendees.

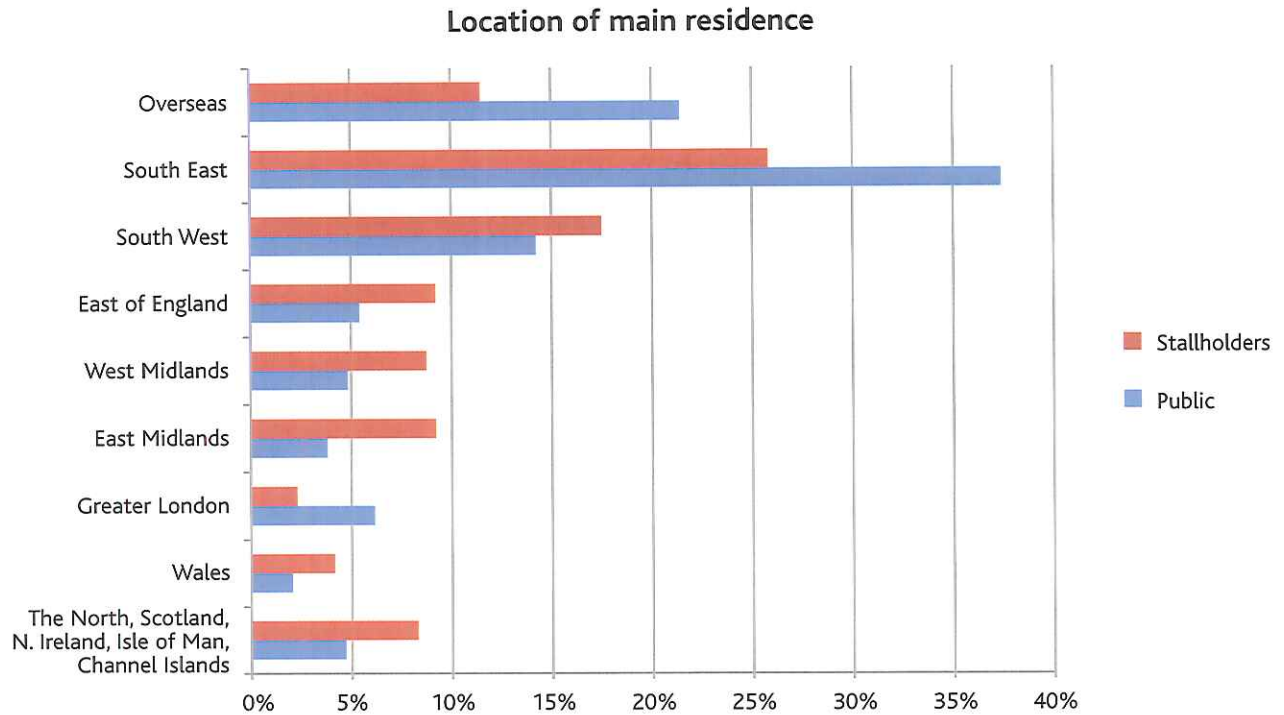
The numbers in both groups arriving by other means were all modest, with the only other number of note being the 18% of the public who arrived by taxi or privately hired mini-bus or coach. Understandably, this method of arrival accounted for a disproportionate number of overseas visitors. People also arrived on foot, by bicycle, by boat – and at least one came on horseback.



Location of main residence

The BIA really lives up to the “International” element with 21% of public attendees and more than 10% of traders coming from outside UK. Countries represented include New Zealand; Australia; South Africa; Brazil; Mexico; USA and Canada as well as most European countries.

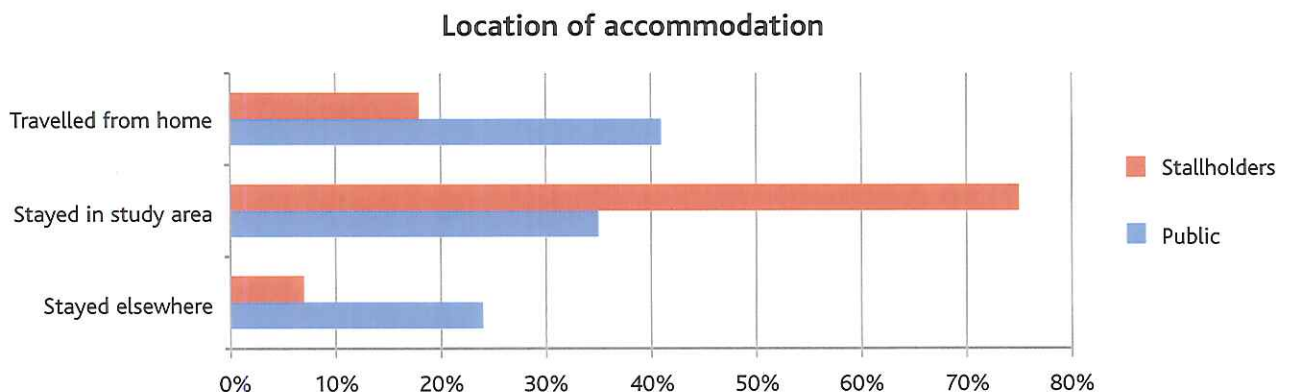
Within the UK, the distribution was concentrated on southern counties, but with surprisingly few from the Greater London area. 8% of both the public and stallholders live within the study area.



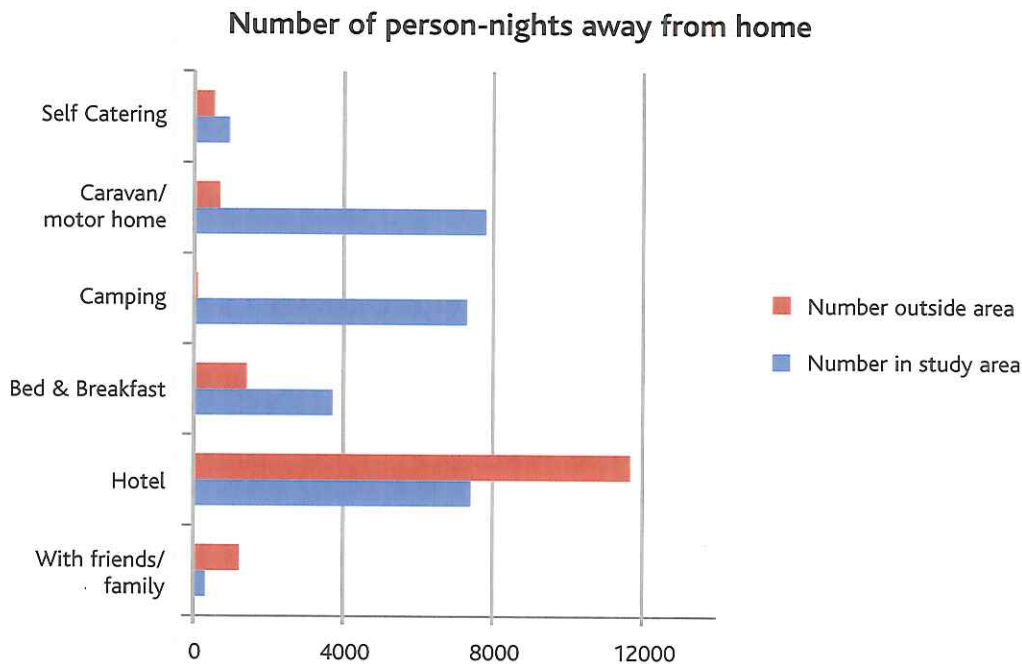
The study area itself falls mainly into the South East region on the above chart, although a small area in the very south west of the study area falls within the Christchurch (Dorset) administrative district, and is thus in the South West region.

Accommodation

The large number of people attending the event for more than one day means that those living any distance away from Beaulieu have to stay at least one night away from home. The survey found that nearly 60% of the public attending spent at least one night away from home, even if they were attending for only one day, but the figure for stall-holders, who need to be on site for at least two days, was 82%.

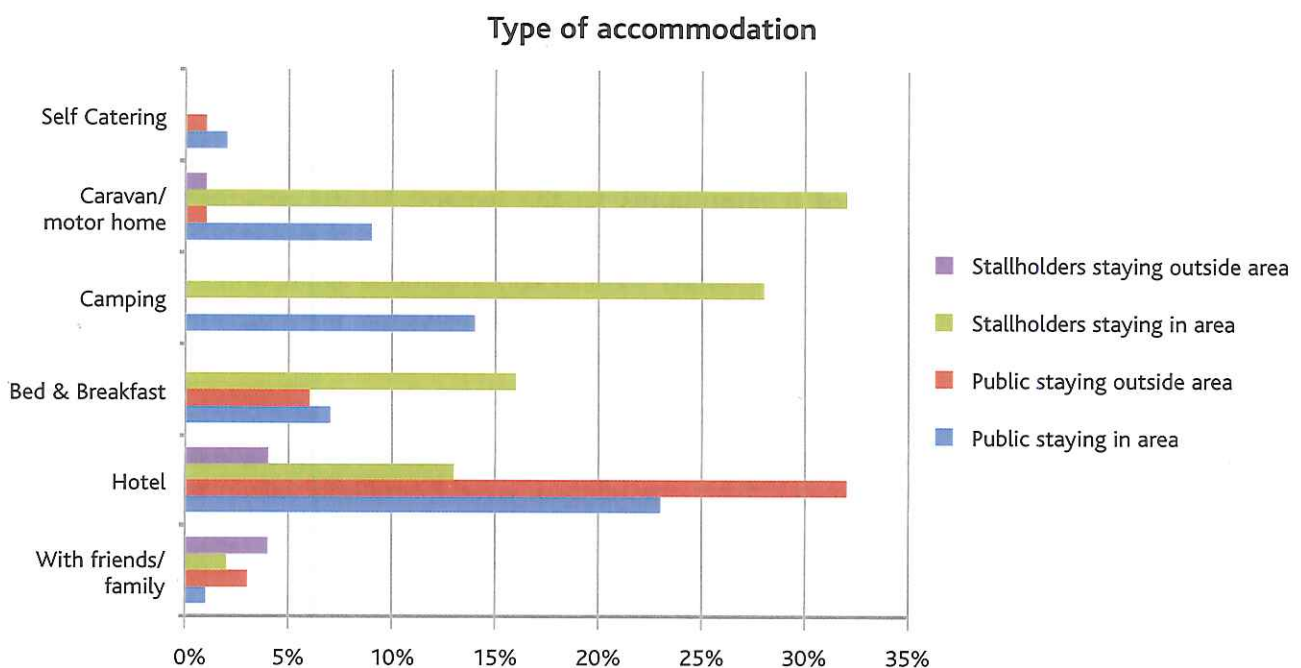


Apart from being asked where they stayed, respondents were asked how many nights they spent away from home in order to attend the BIA. They were also asked if they were extending their stay in the area. Analysis showed that, as a result of the BIA, nearly 43,000 person-nights are spent away from home and over 27,000 of these are spent within the study area, in accommodation ranging in character from a tent to a hotel, as indicated on the chart below.



Of the 60% of stallholders who camped or stayed in a motorhome (see above) virtually all stayed on site. On the other hand, many of the coach parties, especially those bringing overseas visitors, stayed outside the study area in centres such as Southampton and Bournemouth where there is a wide choice of modern hotels that are attractive to international tour operators. At least one party arrived by coach from a hotel in Brighton.

The responses from members of the public staying in hotel or bed and breakfast accommodation show that over half stayed outside the study area, and therefore further away from the event than might be expected as detailed on the chart below. There are many possible reasons for this ranging from personal choice to lack of availability of closer suitable accommodation. Further research would be needed to establish the position.



Spending

The BIA is the largest of many special events that take place at the Beaulieu Visitor Attraction during the course of year. Such events generate income to support the on-going costs of maintaining Beaulieu and its associated enterprises. These are important and significant employers in a largely rural region that relies heavily on tourism.

The focus of most historic vehicle events is the vehicles: the public attend in order to see the vehicles on display. The BIA is different: the focus of the event is trade, with the vehicles themselves almost incidental. The trade in question, though, is the sale of items that relate to transport: it can range in scale from the sale of a motor-related post-card at a few pence to original works of art at several thousand pounds; from an obsolete nut and bolt at under a pound to complete cars in tens, or even hundreds, of thousands.

While this trade may take place at Beaulieu, most of it is between parties based a significant distance away. In other words, the core business undertaken at the BIA has no more direct effect on the local economy than any other event taking place over a similar duration and attracting a similar number of people. This research project has looked at the overall value of the trade that takes place, but has concentrated on the other elements as the main purpose of the study has been to assess the impact on the local economy.

The headline figure is that the BIA generates overall economic activity of over £13 million, of which nearly £3 million is of direct benefit to the local area. Despite the fact that the main sales activity relates to the non-taxable disposal of second hand items, £570,000 VAT is generated.

The figures are summarised in the table below (figures rounded down to nearest £5,000)

Description (numbers refer to notes below)	Gross £000s	Destination			
		Local economy £000s	Wider UK economy £000s	Overseas (note 2) £000s	VAT (estimate) £000s
1 Autojumble and Dealmart activity including receipts by the Beaulieu Visitor Attraction from exhibitors, sponsors, stallholders and members of the public	7,745	1,170	5,520	1,000	55
3 Bonhams Auction	2,865		2,750		115
4 Stallholder and public spending	2,400	1,685	310		400
5 Total	£13,010	£2,855	£8,580	£1,000	£575

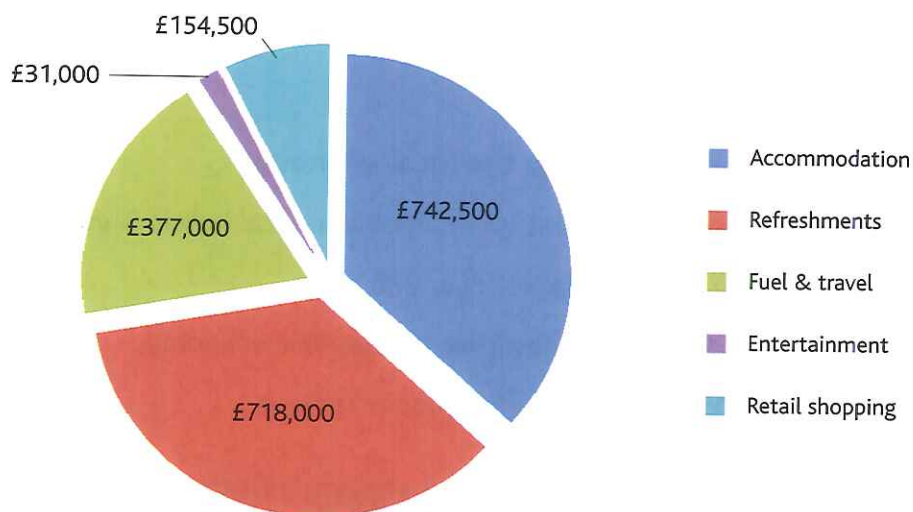
1. The majority of the money received by the Beaulieu Visitor Attraction is used within the study area. A significant proportion of it contributes to the general Estate income that provides employment for over 200 people, including the staff who organise this and other major events taking place through the year. Approximately 25% of this income is spent on direct additional costs associated with the event, such as hire of infrastructure, printing and promotion, temporary additional staff and security. Where feasible, local firms are used for these items.

The autojumble comprised over 2,000 stall pitches for the sale of vehicle parts and other automobilia and some 300 'dealmart' or 'automart' pitches where complete vehicles could be offered for sale. The survey revealed gross spending of over £7 million within this market, of which £1.4 million was between stallholders. Most of this trade is in second hand items being sold by private individuals or small traders who are not registered for VAT. 8% of stall holders are based in the study area, so it has been assumed that 8% of this element of spending remains within the study area. The average turnover per pitch works out at just under £3,000.

2. More than 10% of stallholders are from outside UK, and it is likely that much of the value of their sales (estimated at £1 million) will not come in to the UK economy.
3. The Bonhams Auction took £2,757,383 net including both buyers' and sellers' premiums. These premiums are subject to VAT and the value of VAT shown is an estimate based on Bonhams' standard premium rates. The facility fee paid by Bonhams to Beaulieu is included in the overall revenue received by Beaulieu. It is not possible to know whether any of the vendors of items included in the sale are based in the study area, so it has been assumed that none are – thus all proceeds are shown as going in to the wider general economy.
4. Spending within the study area on non-automotive items by those attending the BIA is substantial, and breaks down as indicated on the pie-chart below. This does not include the spending by the 8% of stallholders and traders who are based in the study area in order to ensure that the figures quoted represent money coming newly in to the study area from elsewhere.

The figures on the chart (which have been rounded down to the nearest £500) are gross and add up to £2,023,000. The value quoted in the gross column of the table opposite includes a further £377,000 which represents the minimum estimated value of spending on accommodation by those attending the BIA but staying outside the study area in centres such as Bournemouth and Southampton.

Gross amounts spent in study area



5. A portion of spending by visitors to any community is subsequently re-circulated within the local economy, thus enhancing the financial benefit such visitors bring to the area being studied. Usually, a multiplier is used to reflect these secondary indirect and induced effects. The application of a multiplier to the direct economic expenditure in the study area would generate an overall economic benefit of over £3 million.

Additional employment

The Beaulieu Visitor Attraction spends some £16,000 on temporary staff for the BIA, comprising an extra 32 temporary staff for "front of house" duties and 42 members of the "Friends of Events" group. This group is a team of local people who are available to be called upon to help at events taking place at Beaulieu and who help behind the scenes.

Additionally, the catering concessions and security contractors between them take on over 150 temporary staff drawn from the locality.

CONCLUSIONS

The Beaulieu International Autojumble has developed over many years during which it has amassed a particularly loyal following of stallholders, traders and visitors. It is an event of considerable interest to a wide range of historic vehicle owners – whether they have large or small, cheap or expensive vehicles, Beaulieu is the place where they are most likely to find that elusive, but essential, rare part.

It is also an event of great importance to those who deal in parts for old vehicles, whether professionally or otherwise. Beaulieu is the place where they are most likely to find a buyer for those as yet unidentified parts.

Stallholders and visitors come from all over the world, making the event truly international. Although the majority may come from the southern counties of England, nearly 50% come from further afield and this brings significant benefits in trade, particularly in respect of accommodation and refreshments, to the local community – The New Forest Area.

This largely rural area, between the large coastal town of Bournemouth to the west and the city of Southampton to the east, relies heavily on tourism. The Beaulieu International Autojumble plays an important and significant role in sustaining the local economy.

Summary of findings

The Beaulieu International Autojumble –

- **Brings nearly £3 million business to the local economy**
- Generates over 11,000 person-nights' accommodation in local hotels & guest houses
- Provides direct temporary employment for over 220
- Is responsible for over £11 million turnover for the national economy
- Contributes at least £570,000 in VAT to government revenue



RESEARCH TEAM



Dr. Jaime Kaminski BA (Hons), PhD, FRGS. Researcher
Jaime is a lecturer and research fellow at the University of Brighton Business School where he works for the Cultural Informatics Research Group. He is also Head of Heritage Research for the Business School's 'Cultural Business, Impact, Strategy and Technology' (CUBIST) research group. Jaime specialises in the study and assessment of socio-economic impact and business issues associated with heritage.

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Vice-President of the Federation of British Historic Vehicle Clubs.
Chairman of FBHVC 1998 to 2002. Co-founder and director of the Historic Vehicle Research Institute. Retired – past career in Motor Industry (Manufacturing, Engineering and Human Resources).



Dr. Paul Frost BA (Hons), MSc., PhD. Researcher
Currently Head of Innovation and Development, School of Sport and Service Management, University of Brighton. Has worked in education, development and research for over 30 years. Co-founder and Chairman of the Historic Vehicle Research Institute. Also co-founder and director of motorbase.com, an organisation dedicated to the sharing of information to unite the historic vehicle community.

Jim Whyman Administration
Vice-President of the Federation of British Historic Vehicle Clubs.
Instrumental in establishing FBHVC in 1988 serving as secretary for all but four years from 1988 to 2008. Currently provides freelance administrative services to clubs and associations. Past career in motor club administration and motoring journalism.



Acknowledgements

The research team would like to thank all who have assisted in the preparation of this report from the individuals who responded to questionnaires, through the team from the University of Brighton who worked tirelessly collecting data at the BIA to the staff at Beaulieu without whose openness and willingness to answer questions this report would not have been possible.

All photographs and the back cover illustration have been provided by Beaulieu Enterprises Ltd.

Back cover

This extract from a 1999 painting by marine artist David Bell depicts the launch of the first HMS Euryalus. This 36-gun frigate was laid down on the slipway at Buckler's Hard on the Beaulieu River in 1801 and was launched less than 2 years later in June 1803. It saw service at the Battle of Trafalgar and after the death of Nelson temporarily became the British fleet's flagship. The village of Buckler's Hard on the Beaulieu Estate grew up around the busy ship-building industry that developed in the 18th century, taking advantage of the timber available from the New Forest.

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