



Transport
Accident
Commission



Motorcycle Monitor

Summary Report 2017

Key Findings 2017

Background

The Motorcycle Monitor has been conducted on behalf of the Transport Accident Commission (TAC) since 2012 to help understand Victorian Motorcyclist's experiences on the roads, and their behaviours and attitudes relating to road safety. Since then, the Motorcycle Monitor has been undertaken on an annual basis. This document summarises findings from 2017.

A random selection of 2,770 Victorians who had a motorcycle licence and/or motorcycle registered in their name was drawn from the VicRoads Registration and Licencing database (VRLD). Overall, 1,027 Victorians who were contacted completed the survey. Data from the Motorcycle Monitor was collected in all four quarters of 2017.

The Motorcycle Monitor has been conducted using a similar methodology since 2014, and is a

multimode project, with respondents having the option to complete the survey in hard copy, over the telephone, or online.

On two occasions each quarter all respondents are sent a Primary Approach Letter (PAL) and hard copy of the questionnaire, which invites them to go online and complete the survey, or fill the hard copy in and return it to Wallis in a reply paid envelope.

Reminder SMS and letters are sent about two weeks after the initial mail out to those who have not completed the survey at that stage. Those who had not yet completed the questionnaire online, or have not yet completed a hard copy questionnaire, are telephoned about three weeks after the initial mail out and asked whether they would like to complete the questionnaire online or over the telephone.

This document provides the key findings on the following topics:



Travelling habits



Learning to ride



Riding activity



Distractions



Attitudes towards speeding



Perceptions of danger



Random breath and drug testing



Motorcycle / scooter ownership



Engine size of main motorcycle



Motorcycle safety features



Protective motorcycle clothing



Profile of recreational off road riders

Note: Percentages have been rounded to the nearest integer. This means that there may be some instances where percentages of each response, even for a single response question, may not add to 100%, but rather may add to 99% or 101%. This is due to rounding and is not an error.

Summary of findings

The findings from the 2017 Motorcycle Monitor suggest that there may have been a shift in the last few years concerning attitudes to speeding and fatigue.

Regarding attitudes to speeding, while there is no evidence from the Motorcycle Monitor that motorcyclists are increasingly speeding (there has been no change in the proportion agreeing that they ride over the speed limit if they can get away with it), there has been declining support for strict enforcement of speed limits. The proportion believing in a 'zero tolerance' approach to speeding in 60kph zones (i.e. you should be booked the moment you go over the speed limit) has declined from about 60% in 2013 and 2014 to around 40% in 2016 and 2017. In addition, there has been a significant decline in the past couple of years in the proportion rating riding a few kilometres above a 60kph speed limit as dangerous (defined as giving a score of 7 to 10 on a 10 point scale) from 52% in 2015 to 44% in 2017.

Similar findings are apparent for the equivalent questions concerning speeds people should be allowed to go before being booked in a 100kph zone. In 2017, only 36% indicated a person should be booked the moment they go over the 100kph speed limit, similar to 2016 (33%), but significantly down from 48% in 2014 and 55% in 2013.

Notably, findings from the Road Safety Monitor suggests the decline in support for a 'zero tolerance' approach to speeding is also evident amongst car and truck drivers, not just motorcyclists.

Interestingly, while there has been a decline in the proportion rating riding a few kilometres over the 60kph speed limit as dangerous in the last couple of years, the proportion rating other factors as dangerous has increased, including:

- Riding with an illegal BAC (96% considered it dangerous in 2017 compared to 92% in 2015)
- Drowsy riding (to 93% in 2017 from 88% in 2015), and

- Riding after taking a small amount of alcohol with prescription drugs (to 92% in 2017 from 86% in 2015).

Regarding fatigue, over the last few years there has been a lift in the proportion of active riders who strongly agree that riding while tired can be as dangerous as drink riding, increasing from 64% in 2013, to 67% in 2016 and 73% in 2017. The rising proportion on this measure, along with the increase in the proportion believing drowsy riding is dangerous, suggest that motorcyclists are increasingly aware of the dangers of fatigue.

While some attitudes may be shifting, the majority of findings have changed little between the 2016 and 2017 Motorcycle Monitors, for example:

- The majority of participants reported to have started riding under the age of 18 was very similar in the last couple of years (55% in 2017 vs. 55% in 2016)
- In both surveys, motorcyclists were most likely to be either self-taught (52% in 2016 vs. 51% in 2017) or taught by an accredited riding instructor (30% in 2016 and 26% in 2017)
- The average monthly distance travel was very similar in the 2016 survey (348km) to that reported in the 2017 survey (399km).

In the 2017 Motorcycle Monitor new questions were introduced that asked participants whether they had ever been distracted while riding a motorcycle. Participants were most likely to have been distracted in the last month by other road users (mentioned by 44%), their own thoughts (26%), street signs (13%) and advertising or shops (10%).

Key Findings 2017



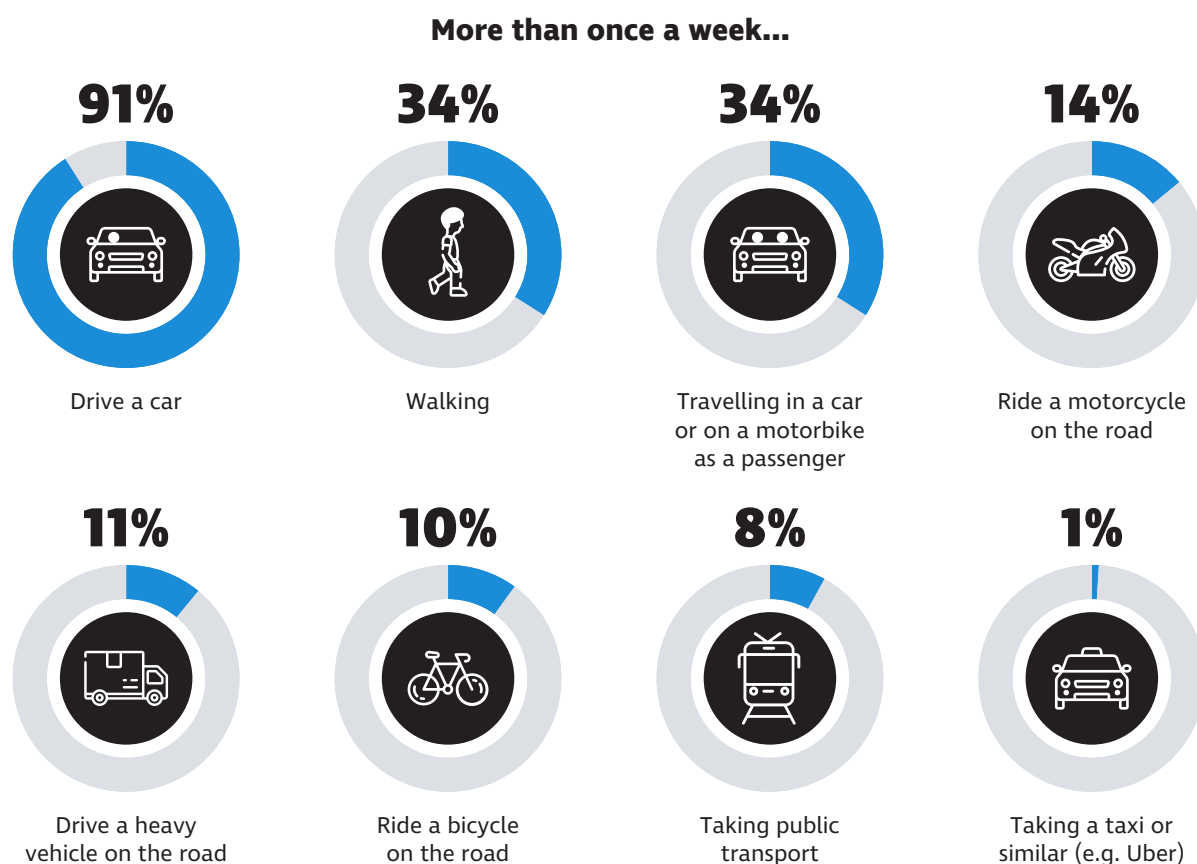
Travelling habits

The large majority of survey participants (91%) drive a car more than once a week, a significantly greater proportion than those riding a motorcycle on the road more than weekly (14%).

Apart from when they were driving or riding themselves, participants were most likely to get

around either as passengers on a motorbike or car (with 34% travelling this way more than once a week), or by walking (34%). Eight per cent caught public transport more than once a week and only 1% took a taxi or similar more than once a week.

Figure 1. Ways and frequency of getting around (2017)



M1. - Thinking about ways you get around, apart from driving or riding yourself, how often do you go somewhere by...?

Total sample; Weighted sample; total n= 1002-1018. Figures may not add to 100% due to rounding.

M2. - How often, if ever, do you drive or ride the following on the road...

Total sample; Weighted sample; total n=994-1019. Figures may not add to 100% due to rounding.

Key Findings 2017



Learning to ride

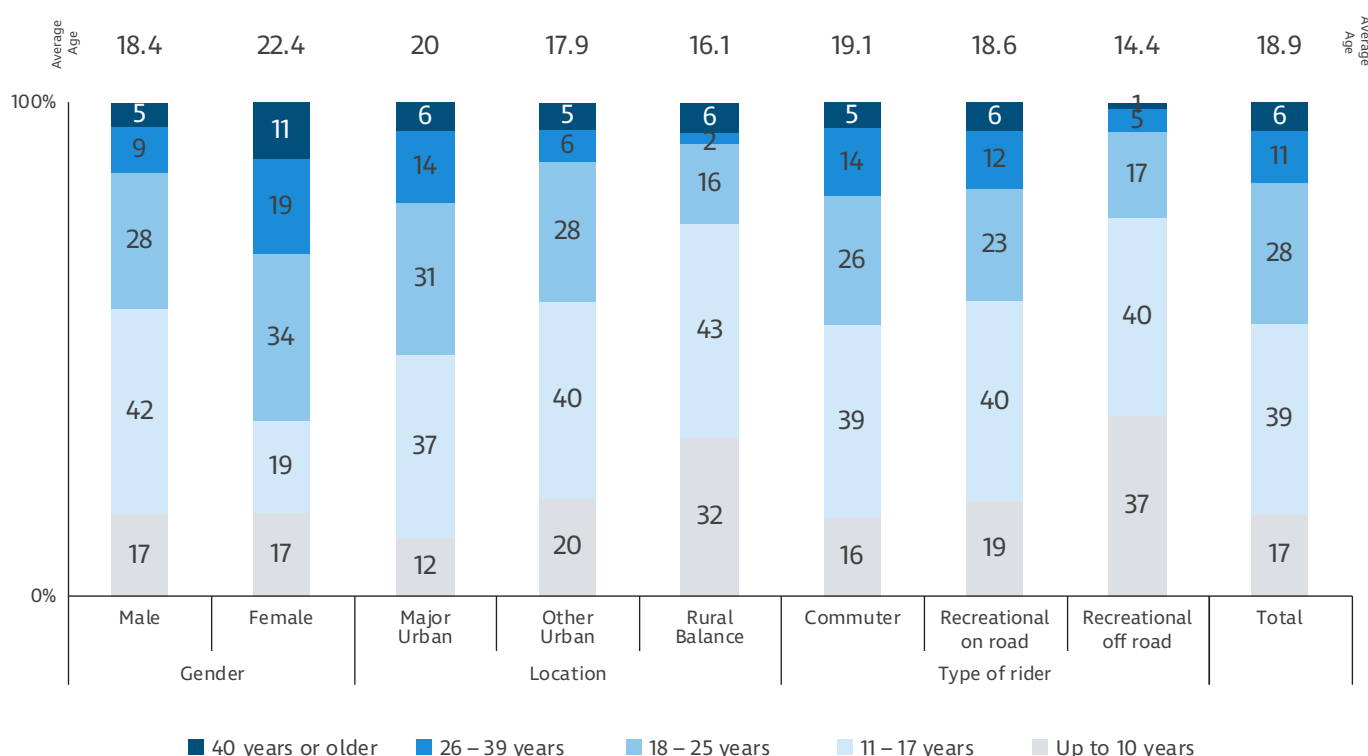
On average, participants started riding a motorcycle at 18.9 years, a similar result to 2014 (18.8 years), 2015 (18.2 years) or 2016 (19.1 years). As was the case in the previous three surveys, most participants started riding either between the ages of 11 and 17 (in 39% of cases) or 18 and 25 (28%).

On average, women started riding later than men (22.4 years vs. 18.4 years), as did those in Major Urban areas (20.0 years) compared to those in Other Urban areas (17.9 years) or Rural Balance

areas (16.1 years). People riding recreationally off road on average started riding at a younger age (14.4 years vs. 18.6 years for recreational on road riders and 19.1 years for commuters).

Consistent with the 2016 survey, about half the participants (51%) were self-taught, while 26% were taught by an accredited riding instructor. Males (55%) and those aged 40 or over (59%) were more likely to be self-taught.

Figure 2. Distribution and average age started riding a motorcycle (2017)



L1. - At what age did you start riding a motorcycle?

Total sample; Weighted sample; total n=1016 (Note: Excludes those who had never ridden a motorcycle)

Figures may not add to 100% due to rounding

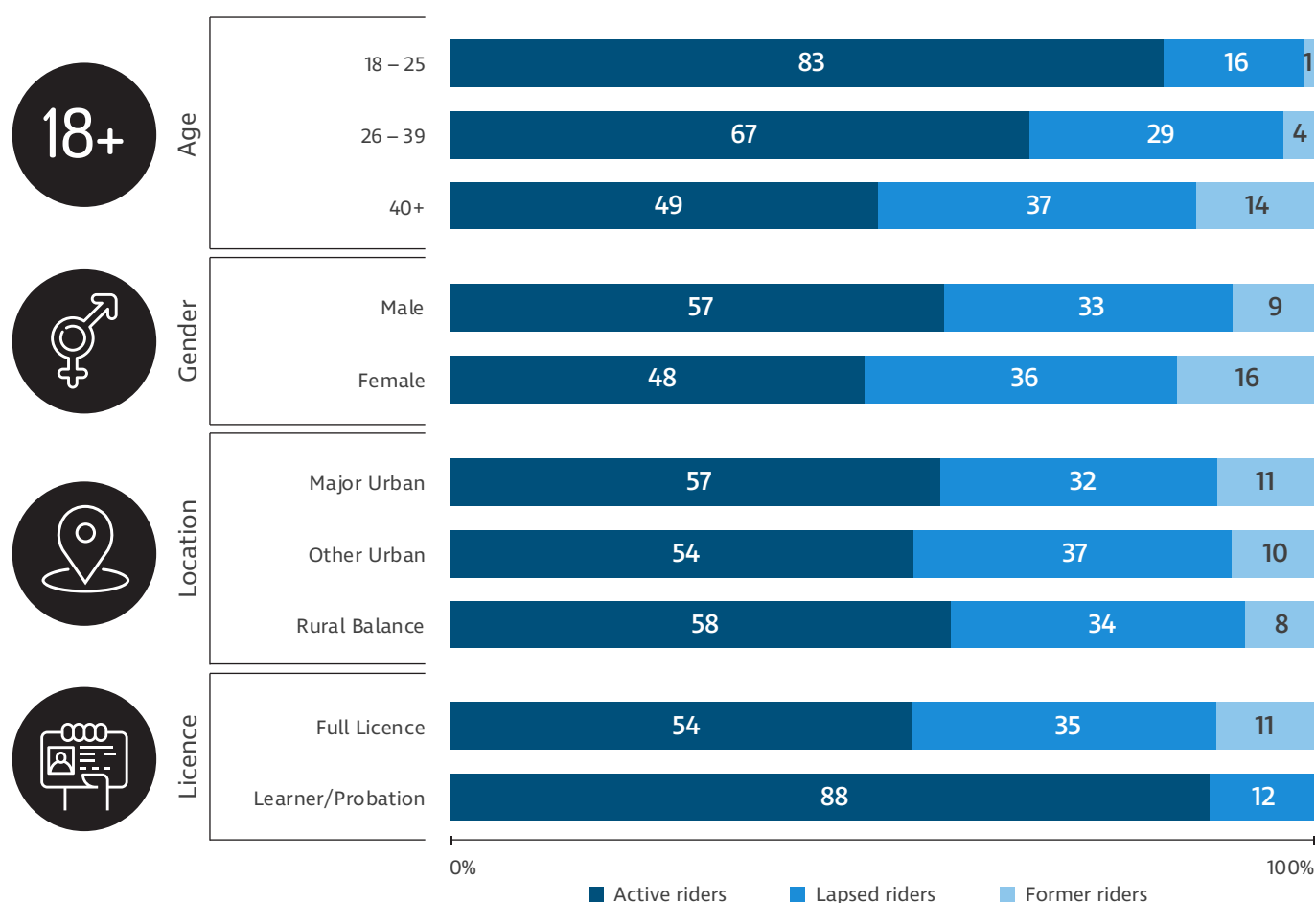
Key Findings 2017



Riding activity

In 2017, 56% were defined as active riders and 34% as lapsed riders, a similar finding to that from 2016. Those aged 18-25 (83%) were significantly more likely to be active riders.

Figure 3. Riding activity segments by selected rider characteristics (2017)



R4. - Which of the following best describes your motorcycle riding history?
 R1. - Have you ridden a motorcycle in the last 12 months (either on or off road)?
 Filter: excludes never ridden a motorcycle; Weighted sample; Base n=1024
 Figures may not add to 100% due to rounding

Key Findings 2017

Amongst those who were active riders, people were more likely to ride recreationally on road (77%) than commute (52%) or to ride recreationally off road (41%). Commuters were significantly more

likely to live in Major Urban areas than elsewhere (57% vs. 44%) while 'recreational off roaders' were significantly less likely to be in Major Urban areas than elsewhere (33% vs. 52%).

Figure 4. Proportion of respondents who commuted and/or rode recreationally in last 12 months – by selected demographic variables (2017)

	% Gender		% Age Group			% Location		
	Male	Female	18 25	26 – 39	40 +	Major Urban	Other Urban	Rural Balance
Recreational on road rider	77	71	77	75	78	80	74	65
Commuter	51	58	61	65	44	57	49	33
Recreational off road rider	41	34	49	48	35	33	53	49

TYP A/B/C. - Approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes?

Filter: Active riders; Weighted; Base n=746

Note: Does not add to 100% due to riders being able to do multiple types of riding

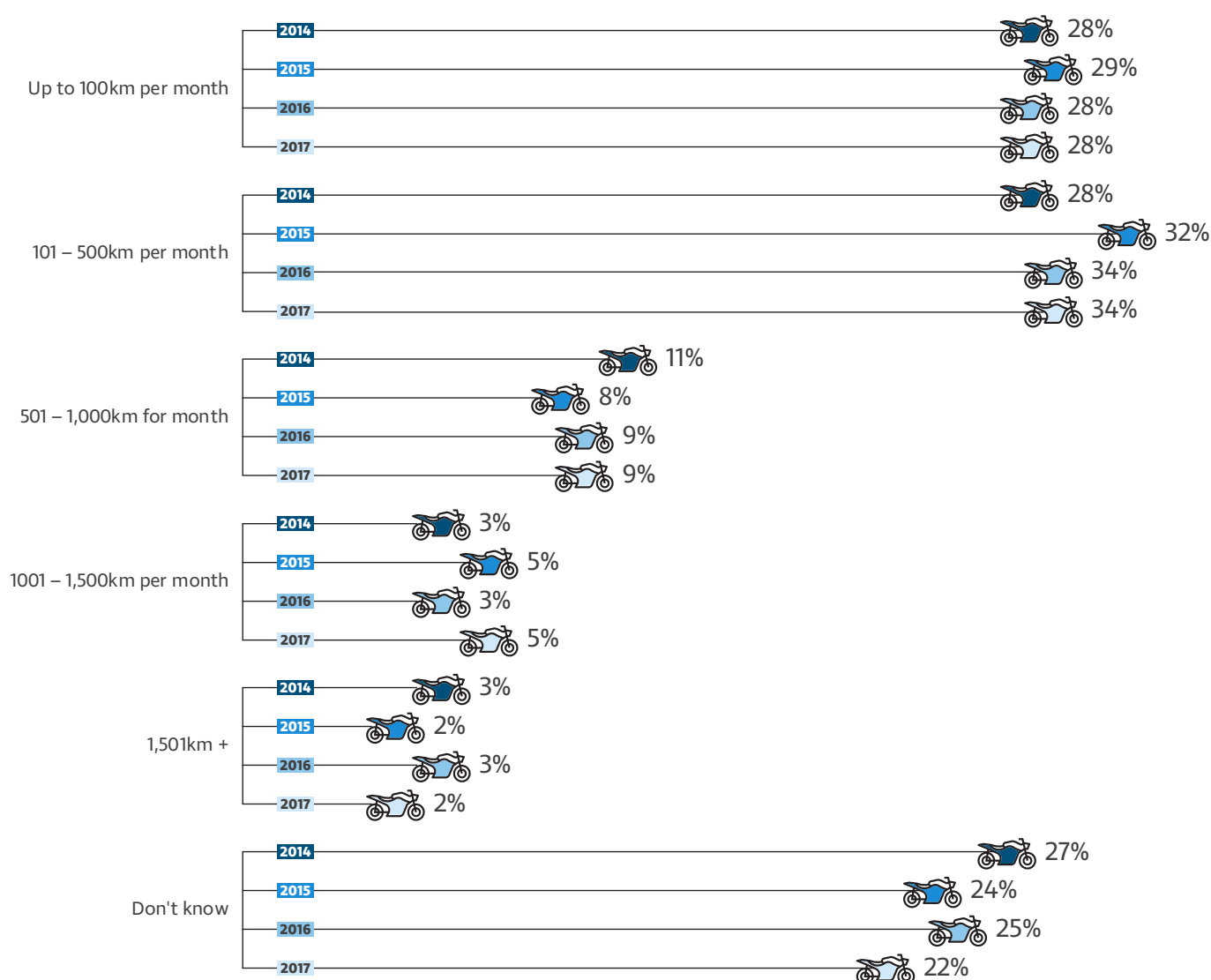
Key Findings 2017

When estimating the distances they had ridden on a motorcycle for any reason in the last 12 months, in 2017 participants were most likely to mention 101-500km per month (34%) followed by up to 100km

per month (28%). These findings were similar to those found in previous surveys.

There were no significant differences by age or gender.

Figure 5. Distance ridden in last 12 months for any purpose – approximate km per month (2014 – 2017)



RID1A/B/C. - Thinking now about how many kilometres you rode ON ANY motorcycle on the road for any reason over the last 12 months... (Per week; per month or per year)

Filter: Ridden in the last 12 months; Weighted; 2014 base n=583; 2015 base n=603; 2016 base n=518; 2017 base n=770

Figures may not add to 100% due to rounding



Distractions

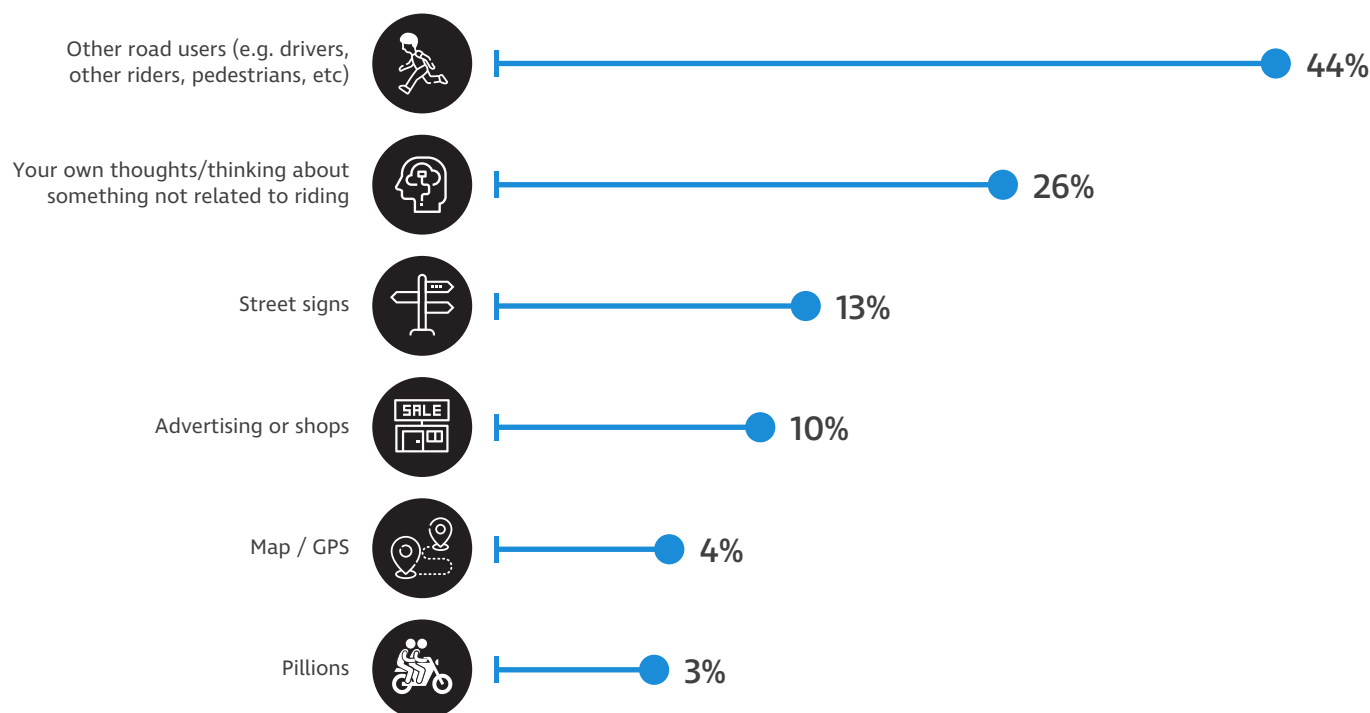
A new question was asked of participants about whether they had been distracted by a number of factors in the last month while riding a motorcycle.

Participants were most likely to have been distracted by other road users (mentioned by 44%), their own thoughts (26%) or street signs (13%).

Younger riders aged 18-25 were more likely to have been distracted than older riders by a number of items:

- Other road users (58% vs. 43%)
- Their own thoughts (42% vs. 24%)
- Street signs (26% vs. 12%).

Figure 6. Distractions in the last month (2017)



DRO3. - In the last month, have you been DISTRACTED by any of the following while riding your motorcycle?
Base: Ridden in the past 12 months; Weighted - 2017 base n=561

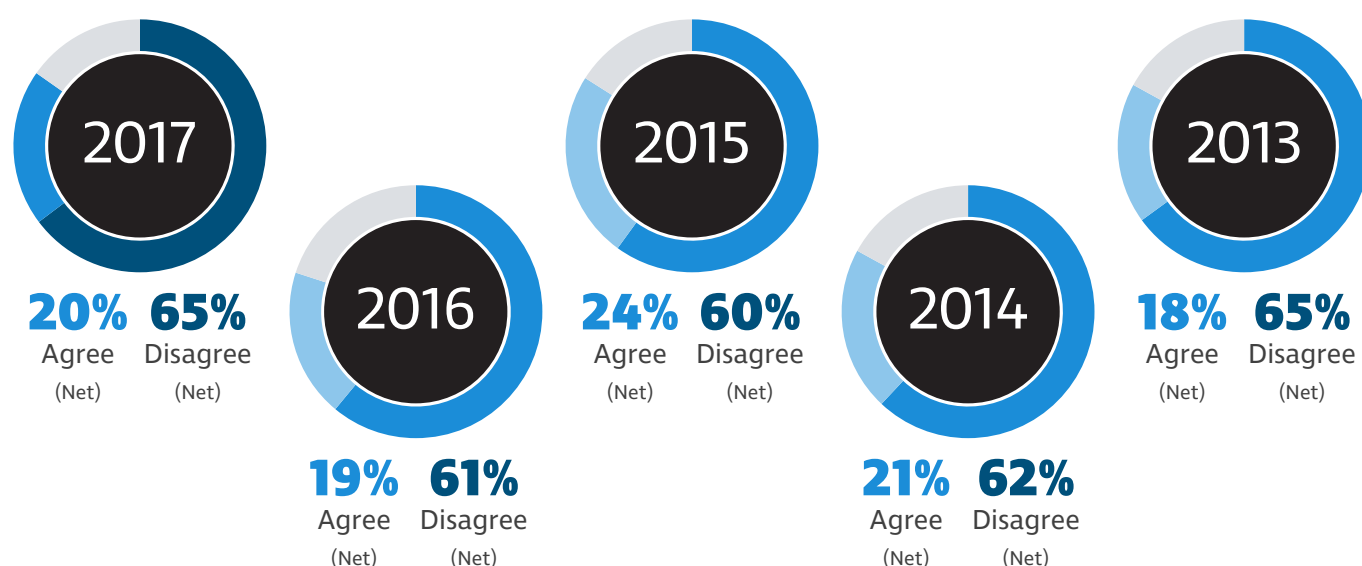


Attitudes towards speeding and speeding behaviour

Participants who had ridden a motorcycle in the past year were asked to what extent they agreed with the statement 'I ride over the speed limit if I'm sure I'll get away with it'. While the majority

disagreed with this statement (65%), a substantial minority agreed with it (20%), as was the case in earlier iterations of the survey.

Figure 7. Agree/disagree with statement: I ride over the speed limit if I'll get away with it (2013 – 2017)



AT1. - To what extent do you agree or disagree with the following statement? I ride over the speed limit if I'm sure I'll get away with it.
Base: Ridden in the last 12 months - Weighted; 2013 base n=489; 2014 base n=569; 2015 base n=592; 2016 base n=521; 2017 base n=789.
Figures may not add to 100% due to rounding.

Participants' views did not differ significantly by age or gender, although it is still worth noting that males were somewhat more likely to agree with the statement than females (21% vs. 11%).

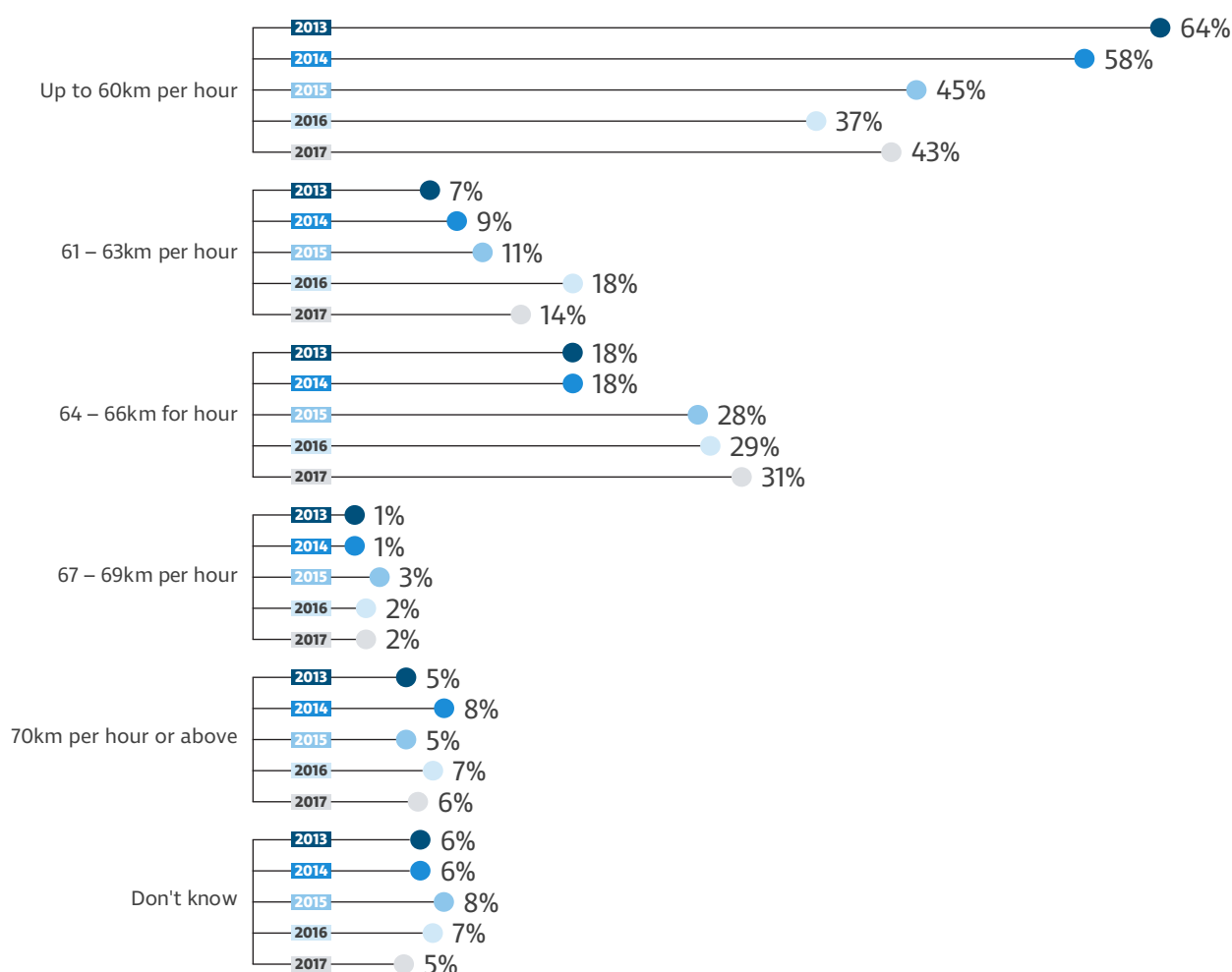
Those who agreed that they would ride over the speed limit if they thought they could get away with it, were more likely to believe that people should be able to ride over 100kph in a 100kph zone without being booked (71% vs. 49% of those who disagreed).

Key Findings 2017

Over the last few years, there has been evidence of a shift away from a belief in strict enforcement of the speed limit - the proportion believing in a 'zero tolerance' approach to speeding (i.e. a person should be booked even if they exceed the speed limit by only one kph) has declined from about 60% in 2013 and 2014 to around 40% in 2016 and 2017. Similar

findings were apparent for the equivalent question (see over the page) concerning speeds people should be allowed to go before being booked in a 100kph zone – in 2017 only 36% indicated a person should only be able to go up to 100kph before being booked in a 100kph zone, down from 40% in 2015, 48% in 2014 and 55% in 2013.

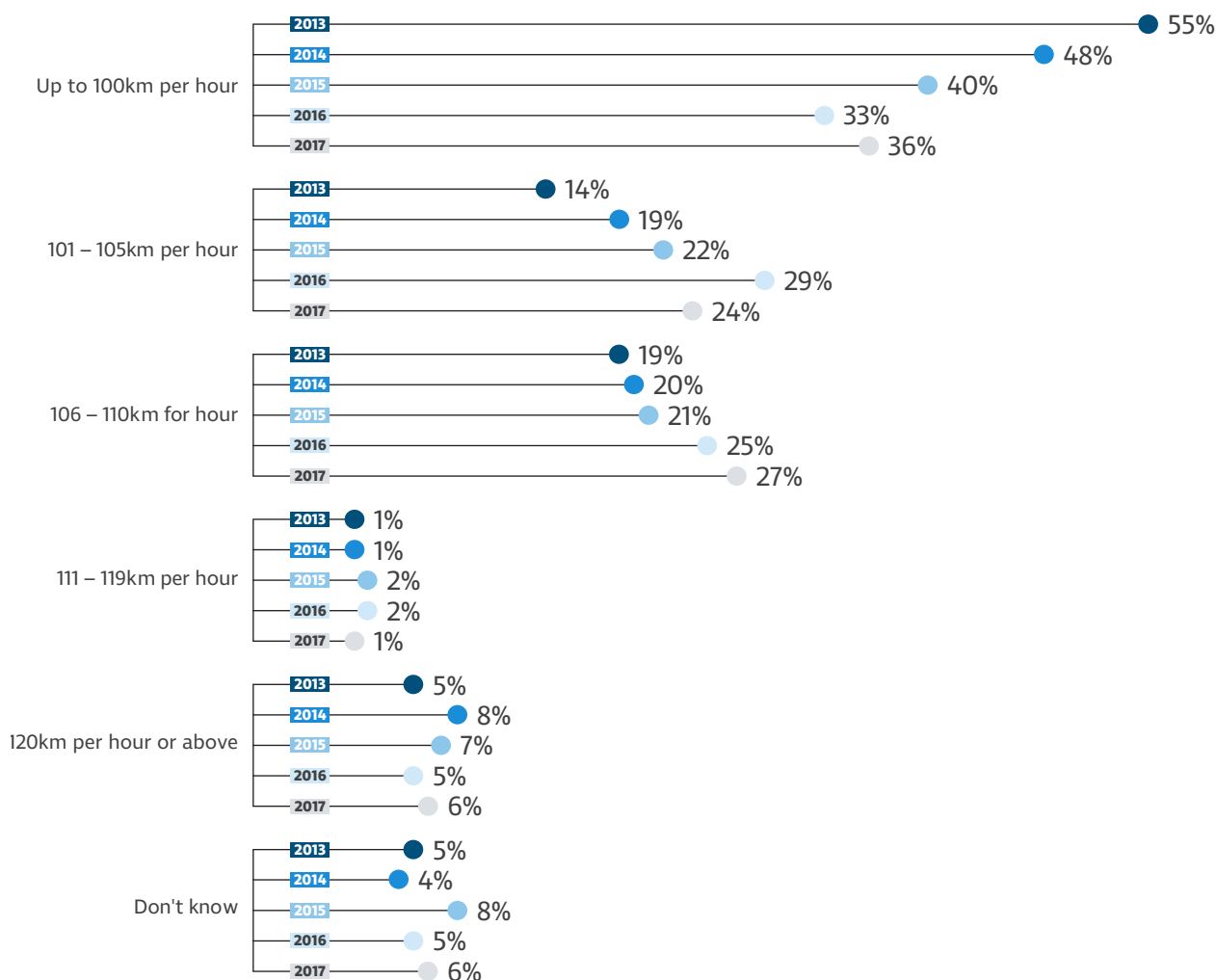
Figure 8. Speed people should be allowed to ride a motorcycle in a 60kph zone without being booked for speeding (2013 – 2017)



SPE2. - How fast should people be allowed to ride a motorcycle in a 60km/h zone without being booked for speeding?
 Filter: Active riders; Weighted; 2013 base n=403; 2014 base n=510; 2015 base n=488; 2016 base n=465; 2017 base n=727
 Excludes respondent error
 Figures may not add to 100% due to rounding

Key Findings 2017

Figure 9. Speed people should be allowed to ride a motorcycle in a 100kph zone without being booked for speeding (2013 – 2017)



SPE4. - How fast should people be allowed to ride a motorcycle in a 100km/h zone without being booked for speeding?

Filter: Active riders; Weighted; 2013 base n=403; 2014 base n=506; 2015 base n=487; 2016 base n=460; 2017 base n=726

Excludes respondent error

Figures may not add to 100% due to rounding

Further, in both 60kph and 100kph zones those who think there should be more leeway when being booked for speeding are the more likely to speed when presented with the opportunity. For example, amongst those who say a person should be booked at any speed over 100kph, only 36% indicated they

would ever ride above that speed. By contrast, amongst those who say a person should be booked only once they ride at over 110kph, 79% indicated they would at least at some stage ride above that speed.

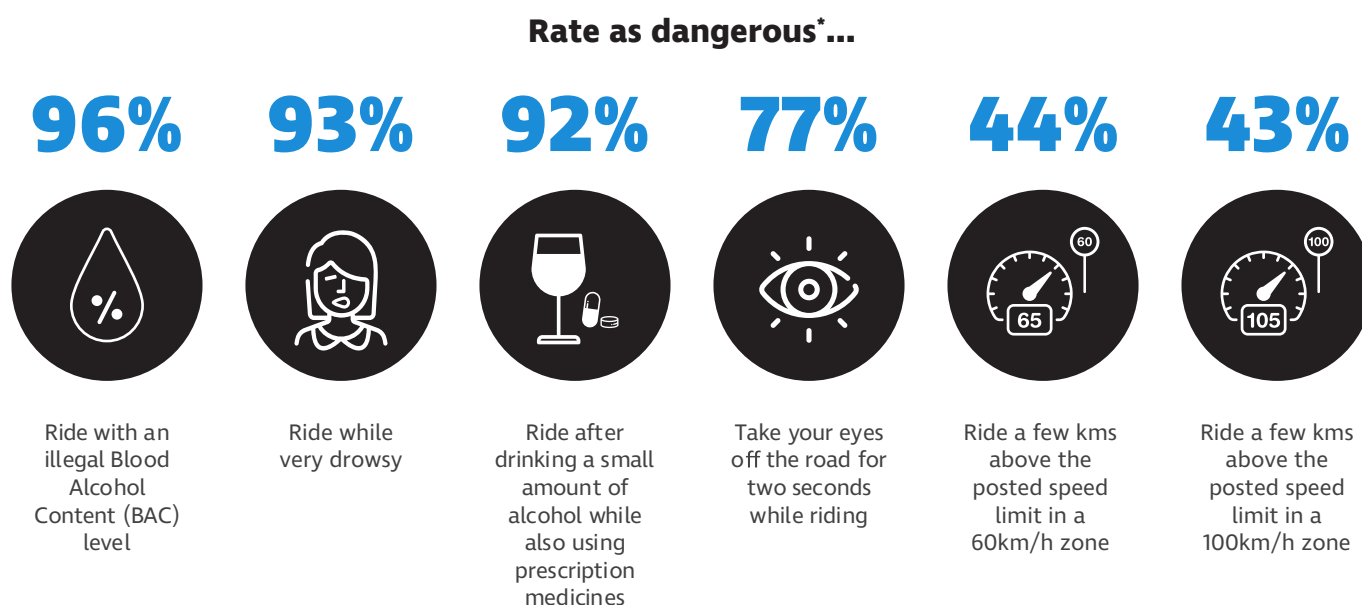


Perceptions of danger

The figure below compares riders' 'danger perception' of riding a few kilometres over the speed limit with the danger associated with other behaviours, such as drink riding or riding while very drowsy.

On the whole riders do not consider riding a few kilometres over the speed limit to be as dangerous as riding with illegal blood alcohol content or drowsy riding.

Figure 10. Perception of danger associated various riding behaviour (2017)



DAN1-DAN6. Rating as 7-10 using a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to... Active riders only; Weighted; 2017 base n=723

In the past couple of years there has been a significant decline in the proportion rating riding a few kilometres above a 60kph speed limit as dangerous (defined as giving a score of 7 to 10 on a 10 point scale) from 52% in 2015 to 44% in 2017.

Interestingly, while there has been a decline in the proportion rating riding a few kilometres over the 60kph speed limit as dangerous in the last couple of years, the proportion rating other factors as

dangerous has increased, including:

- Riding with an illegal BAC (96% considered it dangerous in 2017 compared to 92% in 2015)
- Drowsy riding (to 93% in 2017 from 88% in 2015), and
- Riding after taking a small amount of alcohol with prescription drugs (to 92% in 2017 from 86% in 2015).

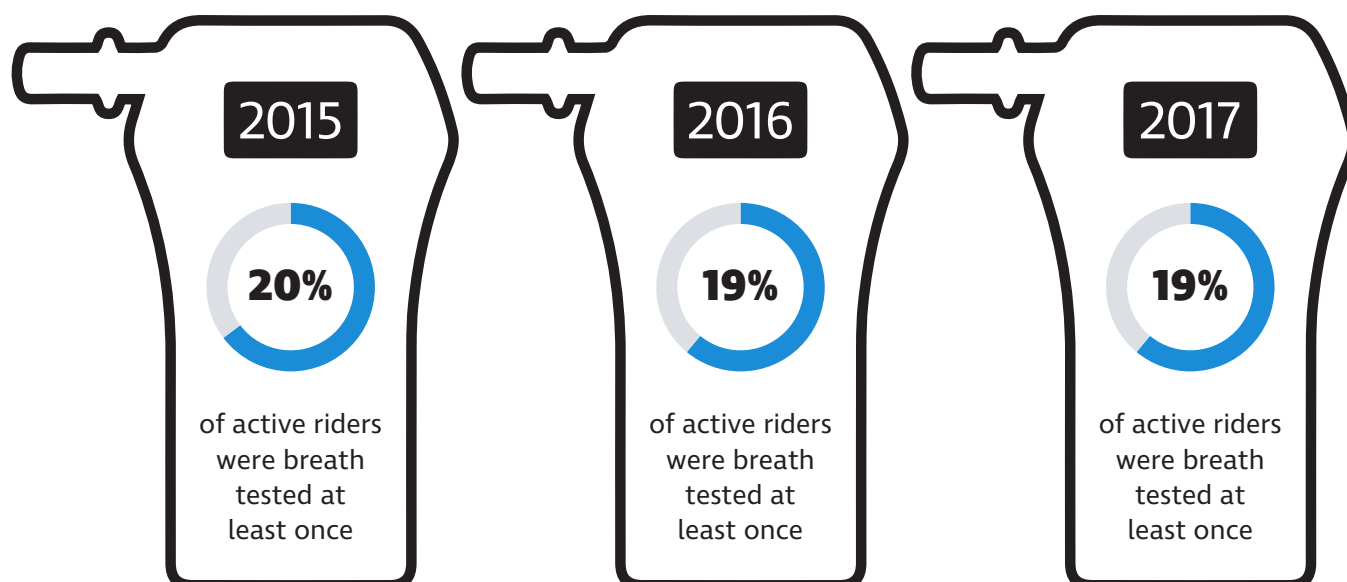


Random breath and drug testing

In 2017 close to one in five (19%) active riders had been breath tested when riding their motorcycle in the past 12 months, a similar result to 2016.

Males were significantly more likely to have been breath tested than females (21% vs. 7%).

Figure 11. Proportion of active riders breath tested (2015 – 2017)



POL2. - In the last 12 months, how many times, if any have you been breath-tested when riding your motorcycle
Filter: Active riders; Weighted; 2017 base n=726

While a small proportion admitted to being randomly drug tested in the last 12 months (4%), this was a greater proportion than in 2016 (less than 1%) or 2015 (2%). This coincided with there being more drug tests in 2017.

As was the case in 2016, only a small minority of participants (3%) indicated that they had ridden

their motorcycle when they knew or thought they were possibly over the legal blood alcohol limit. Younger participants aged 18-25 were significantly more likely to have done so than older participants (10% vs. 2%).

Key Findings 2017



Motorcycle / scooter ownership

Respondents were most likely to ride either off road bikes/trail bikes (mentioned by 24%), cruisers (23%) or sports bikes (19%), ahead of sports tourers (14%) or scooters (7%).

There were several differences across demographics, including:

- Females were more likely to ride scooters (22% vs. 6% amongst males)
- Those aged 40 or over were less likely to ride sports bikes (12% vs. 30%), and
- Those in Major Urban areas:
 - Were more likely to ride sports bikes (26% vs. 11% in other areas) or scooters (11% vs. 2%)
 - But less likely to ride off road bikes/trail bikes (16% vs. 36% in other areas).

Figure 12. Type of main motorcycle by selected rider characteristics (2017)

	% Gender		% Age Group			% Location		
	Male	Female	18 – 25	26 – 39	40 +	Major Urban	Other Urban	Rural Balance
Off road bike / trail bike	25	21	26	25	24	16	29	53
Cruiser	24	15	16	18	28	20	31	21
Sports bike	19	23	34	28	12	26	11	10
Sports tourer	15	8	6	9	18	16	14	5
Scooter	6	22	11	9	6	11	2	2
Dual sport	5	4	4	3	7	3	9	4
Other	4	2	1	5	4	5	3	1
Other road bike	2	7	4	4	4	3	1	4

MC1. - Thinking about the one motorcycle you ride most often. What type of motorcycle is it?

Filter: Base: Active rider ; Weighted; base n=693

Figures may not add to 100% due to rounding

Honda (27%) and Yamaha (16%) were the most popular makes (as in previous years), closely followed by Harley Davidson (12%) and Suzuki (10%). Honda is significantly more popular amongst females (44% vs. 24% amongst males) while Harley Davidson is significantly more popular amongst those aged 40 or over (16% vs. 6% amongst those aged under 40).

Over two-fifth of active riders (41%) with at least one bike at home had their 'most ridden' bike manufactured in 2010 or later, while 39% had a bike manufactured between 2000 and 2009, and 20% had a bike manufactured earlier than 2000.

Key Findings 2017



Engine size of main motorcycle

Motorcycles that were ridden most often were most likely to have engine sizes of 701+cc (40%) ahead of those with a reported engine size of 251-700cc (34%) and those with a reported engine size of up to 250cc (25%).

Those with the more powerful 701+cc engines were significantly more likely to be male (42% had a 701+cc engine), or aged 40+ (53%).

Figure 13. Engine size of main motorcycle by selected rider characteristics (2017)

	% Gender		% Age Group			% Location		
	Male	Female	18 – 25	26 – 39	40 +	Major Urban	Other Urban	Rural Balance
0 – 250cc	21	59	40	32	18	23	22	38
251 – 700cc	36	18	46	40	29	36	32	33
701cc +	42	22	12	24	53	41	42	29

MC5. - What capacity is the engine?

Filter: Active riders; Weighted sample; Base n=694

Figures may not add to 100% due to rounding



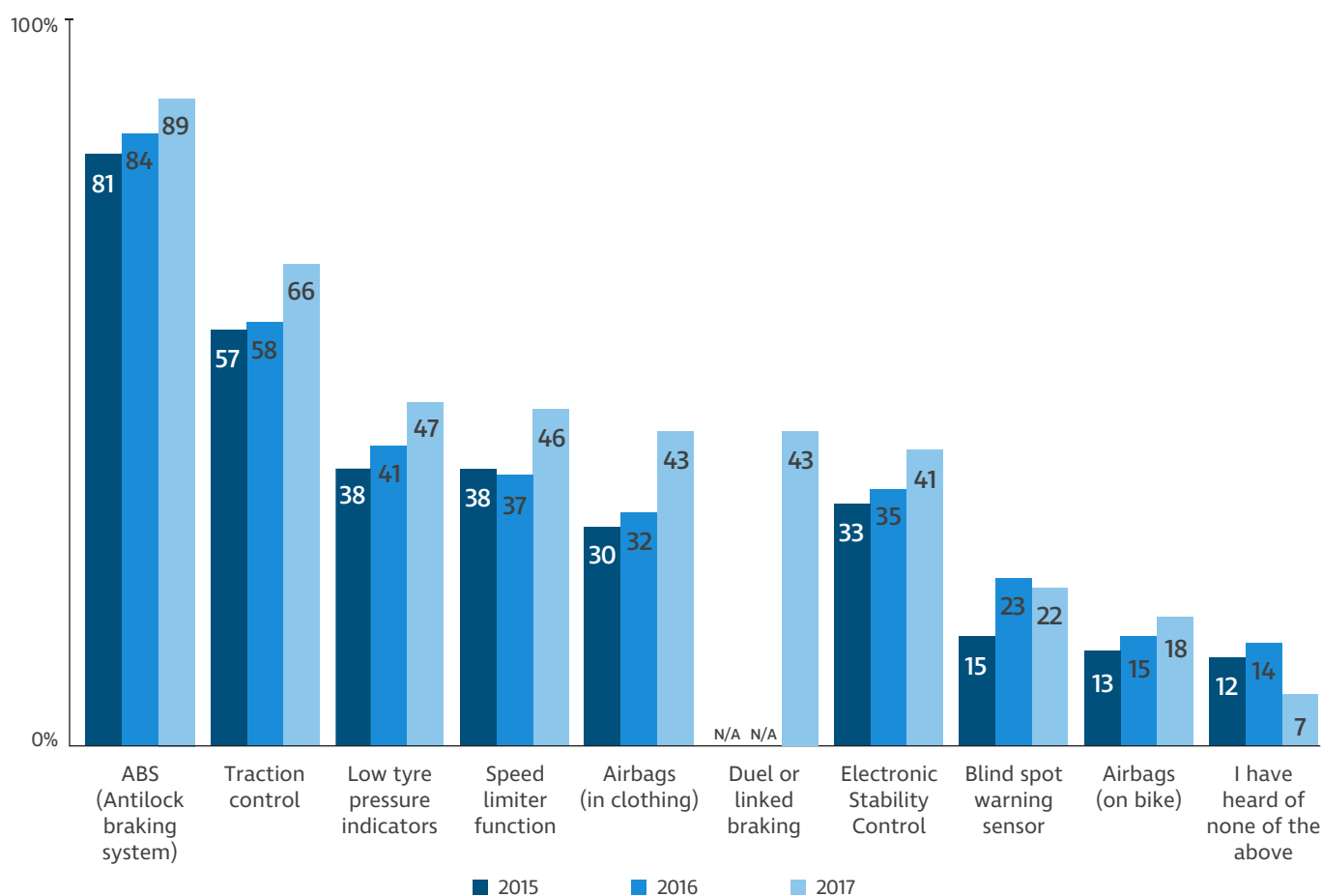
Motorcycle safety features

Active riders were asked if they had heard of a number of safety features currently available on some motorcycles and/or clothing. The most common features participants had heard of were ABS (89%), traction control (66%) and low tyre pressure indicators (47%). The first two of these

features were also the most common features heard of in the 2016 survey. Dual or linked braking was introduced into the questionnaire in 2017.

Awareness of the features has generally risen in the last couple of years.

Figure 14. Awareness of motorcycle safety features (2015 – 2017)



FEA. - Have you heard of any of the following motorcycle safety features?
Filter: Active riders; Weighted; 2015 base n=491; 2016 base n=468; 2017 base n=565

Key Findings 2017



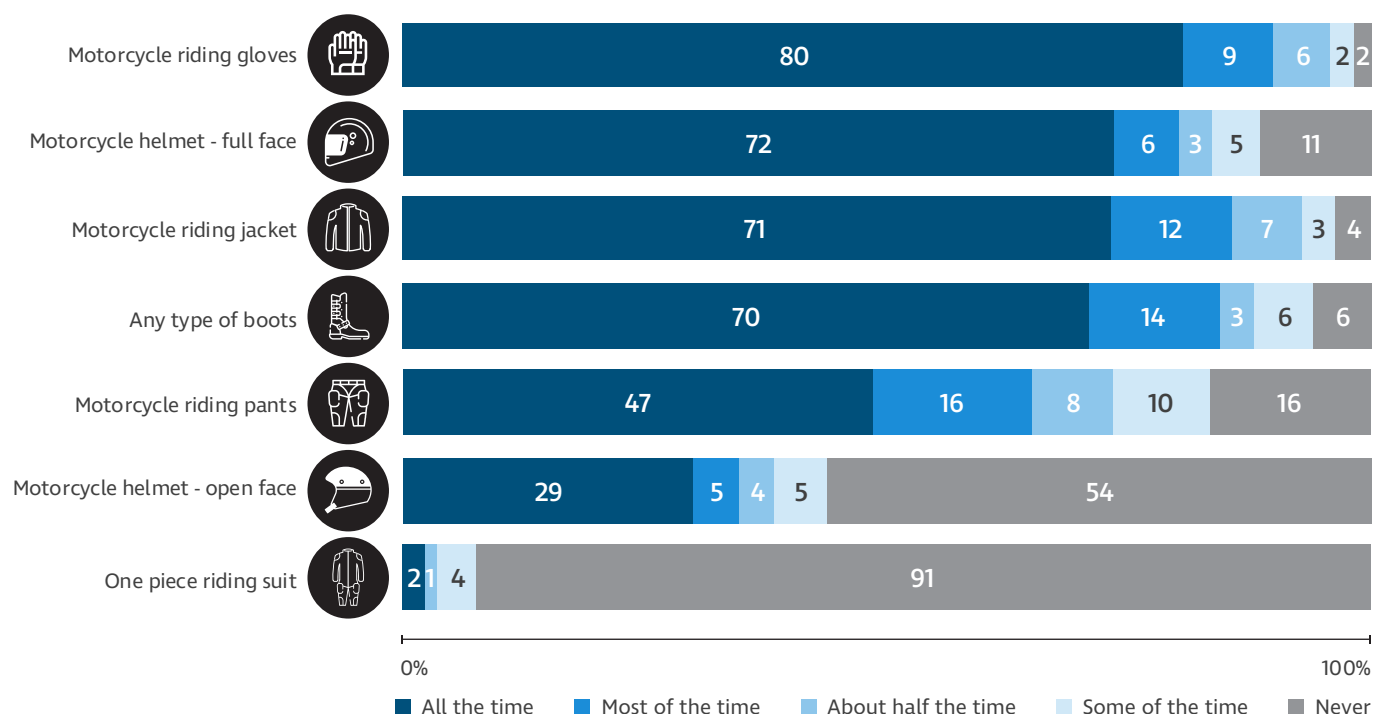
Protective motorcycle clothing

Riders were asked how often they wore protective gear when riding a motorcycle. A majority wore the following gear all the time: motorcycle riding gloves (80%), a full faced motorcycle helmet (72%), a motorcycle riding jacket (71%), any type of boots (70%). Less than half the population (47%) wore motorcycle riding pants all the time, or an open faced motorcycle helmet (29%).

There were few significant differences by age, gender or location. Those that were evident included:

- Those aged over 40 were more likely to wear an open faced helmet all the time (37% vs. 18%)
- Conversely, those aged under 40 were more likely to wear a full faced helmet all the time (84% vs. 64%).
- Those in Major Urban areas were less likely to wear any type of boots all the time (64% vs. 80%).

Figure 15. Usage of protective motorcycle clothing (2017)



MS1-6. - When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
 Filter: Active riders; Weighted; 2017 Base n=479
 Figures may not add to 100% due to rounding

Key Findings 2017



Rider profiles

Off road riders start riding younger than other riders ...



Average age started riding in years

Off road



Recreational on road



Commuter



... and are more likely to be taught by friends or family ...

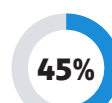


Friends / family

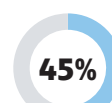
Off road



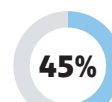
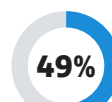
Recreational on road



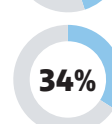
Commuter



Self-taught



Learners course



... off road on private property.

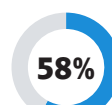


off road on private property

Off road



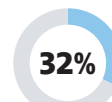
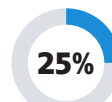
Recreational on road



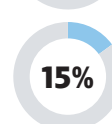
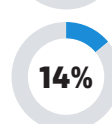
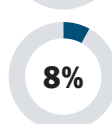
Commuter



Learners course



Quiet back streets



L1. - At what age did you start riding a motorcycle? | Total sample; Weighted sample; Base n=1016
L2. - Who taught you to ride a motorcycle? | Total sample; Weighted sample; Base n=1027
L3. - Where did you first learn to ride? | Total sample; Weighted sample; Base n=1027

Key Findings 2017

Off road riders
are more likely
to have had
a crash ...

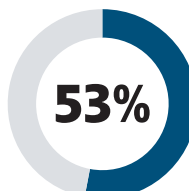


... and to think
speeding is
dangerous*.

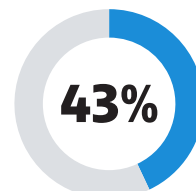


*Score of 7 – 10 on DAN1

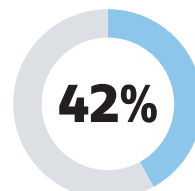
Off road



Recreational
on road



Commuter



MC7. - Have you ever had a crash while riding a motorcycle? | Total sample: Weighted; Base n=1021

DAN1. - Using a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to ride a few kilometres above the speed limit in a 60km/h zone? | Active riders only; Weighted; 2017 Base n=723

They are also more
likely to always
wear boots ...



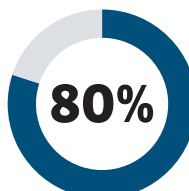
... or riding
pants,



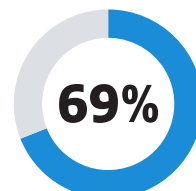
but less likely to
always wear a
riding jacket.



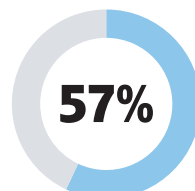
Off road



Recreational
on road



Commuter



60%

47%

36%

64%

75%

72%

MS1-6. - When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing? Riding jacket; Riding pants; any type of boots | Active riders only; Weighted; Quarters 2-4 2017 Base n=479



Wallis

Wallis team on this project:

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