

GAME CHANGERS



TAC MOTORCYCLE MONITOR - 2023

Final report of findings
January 2024

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CONTENTS

3	Executive summary
7	Research context and objectives
11	Detailed findings: Motorcycle riding
23	Detailed findings: Learning to ride

29	Detailed findings: Motorcycle riding behaviours and attitudes
41	Detailed findings: Motorcycle safety
49	Detailed findings: Crash history
55	Detailed findings: E-devices
61	Appendix

EXECUTIVE SUMMARY

1

EXECUTIVE SUMMARY

The 2023 Motorcycle Monitor survey reveals key trends in transportation habits. Cars remain the predominant mode of transport, used by 99% of respondents. However, motorcycles are also common, with 77% of respondents riding at least occasionally. There was a significant increase in the usage of e-transport devices, such as e-bikes, e-scooters, and e-skateboards, with 19% of respondents reporting their usage, up from 14% in 2022. The usage of public transportation also saw a substantial increase to 76% in 2023 from 70% in 2022.

Motorcycle usage remained steady at 69%, with younger respondents, males, and those with probationary or learner's permit more likely to have ridden in the past 12 months. Riding time was mostly utilized for recreational purposes (on road) (51%) and commuting (25%), with cruisers being the most popular type of motorcycle ridden in 2023.

The reasons for not riding a motorcycle included no longer owning one, changes in lifestyle or family commitments, and preference for other modes of transport. Safety concerns and loss of interest were cited by those who have stopped riding and do not intend to ride again.

The learning to ride section revealed that most riders begin learning to ride a motorcycle at a young age, with 76% starting before the age of 25. In addition, 74% of riders who have ridden in the last 12 months keep their skills up to date using sources such as YouTube, motorcycle websites, and friends and family.



EXECUTIVE SUMMARY

In relation to attitudes and behaviours, most riders avoid riding a motorcycle if they believe they might be over the legal blood alcohol limit. However, one in four respondents admitted to riding a motorcycle after drinking, when they believed they were under the legal limit.

Regarding speeding, there is a higher perceived risk associated with speeding more than 3 km/h over the posted speed limit, particularly in 60 km/h zones. Aligning with the perceived risks associated with speeding, instances of moderate speeding behaviours have been identified. Riders tend to avoid speeding more than 3 km/h over the posted speed limit, and overall, are more likely to avoid speeding when riding in 60 km/h zones.

In terms of motorcycle safety, ABS is the most recognised safety feature, followed by traction control, and motorcycle stability control.

Meanwhile, helmets are the most commonly used protective gear, followed by riding gloves and riding jackets.

In terms of strategies for ensuring safety, the most utilized strategies include staying alert, wearing protective gear, and planning trips in advance. In 2023, there was a significant increase in those reporting 'trip planning' as a safety strategy, along with riding in a group and avoiding riding while tired.

Regarding crash history, 46% of respondents experienced having ever had a motorcycle crash, consistent with the previous year. Most incidents had involved solo riders (74%), and more than half did not involve another vehicle (57%).



EXECUTIVE SUMMARY

Lastly, in terms of e-transport devices, e-bikes and e-scooters were the most popular of these modes of transport. E-transport devices are mostly used for recreation, socialisation, and experimentation.

Most e-transport device users ride on roads, dedicated bike lanes, or shared paths and prefer areas with a speed limit below 50km/h. Shared paths and dedicated bike lanes are perceived as safer options for riding e-transport devices.



RESEARCH CONTEXT

2

BACKGROUND

In 2022, Ipsos was commissioned to undertake the TAC Motorcycle Monitor Survey, the survey is conducted quarterly, and the results are reported annually. The results from the survey help TAC to better understand the views of both active and passive motorcycle riders, as well as those with a motorcycle registered in their name.

Findings from the research are used to inform public education campaigns and policy development.

The methodology was designed to optimise response rates by allowing participants the flexibility to participate in this study using their preferred mode of completion.

The study included three 'touch points' with participants, i.e. online survey, paper survey and telephone interviews.

RESEARCH OBJECTIVES

The purpose of this research is to measure and track changes in road user attitudes and self-reported behaviour and identify potential areas of concern in the community.

The research covers a range of topics including travel habits, riding activity, speeding, fatigue, drinking behaviour and attitudes, use of protective gear and other ad hoc modules such as crash history, up-skilling/training and learning to ride experience.



RESEARCH OVERVIEW

Motorcycle Monitor - 2023	
Fieldwork	Q1'23: w/c 20 Feb – w/c 3 Apr 2023 Q2'23: w/c 8 May – w/c 19 Jun 2023 Q3'23: w/c 31 Jul – w/c 11 Sep 2023 Q4'23: w/c 16 Oct – w/c 27 Nov 2023
Methodology	Online survey, with option to request a paper copy or phone interview.
Sample specifications	Victorians who have a motorcycle licence and/or motorcycle registered in their name.
Sample size	Q1'23: n=253 Q2'23: n=217 Q3'23: n=226 Q4'23: n=266
Weighting	Results were weighted by gender, age, location and licence type to reflect the Victorian Motorcyclist population. The weighting scheme follows the demographic profile of the motorcycle licence and registration population from the VicRoads database. The demographic profile used for weighting is available in the next page.

DEMOGRAPHICS



Profile

Gender	% unweighted	% weighted	% population
Male	84%	87%	87%
Female	16%	13%	13%

Age	% unweighted	% weighted	% population
18-25 Y.O.	16%	4%	4%
26-39 Y.O.	20%	24%	24%
40+ Y.O.	64%	72%	72%

Location	% unweighted	% weighted	% population
Major Urban (All urban Centres with a population of 100,000 or more i.e., Melbourne, Geelong, Ballarat)	60%	57%	57%
Other Urban (All urban Centres with a population between 1,000 and 99,999 i.e., Warrnambool, Sale, Benalla)	30%	31%	31%
Rural Balance (Remainder of State/Territory and includes Bounded Localities (centres with population of between 200 and 999 i.e., Taradale, Venus Bay, Fish Creek).	9%	12%	12%

Licence type	% unweighted	% weighted	% population
Full motorcycle licence	84%	91%	91%
Learner or probationary licence	14%	7%	7%
No licence	2%	2%	2%



DETAILED FINDINGS

3

MOTORCYCLE RIDING

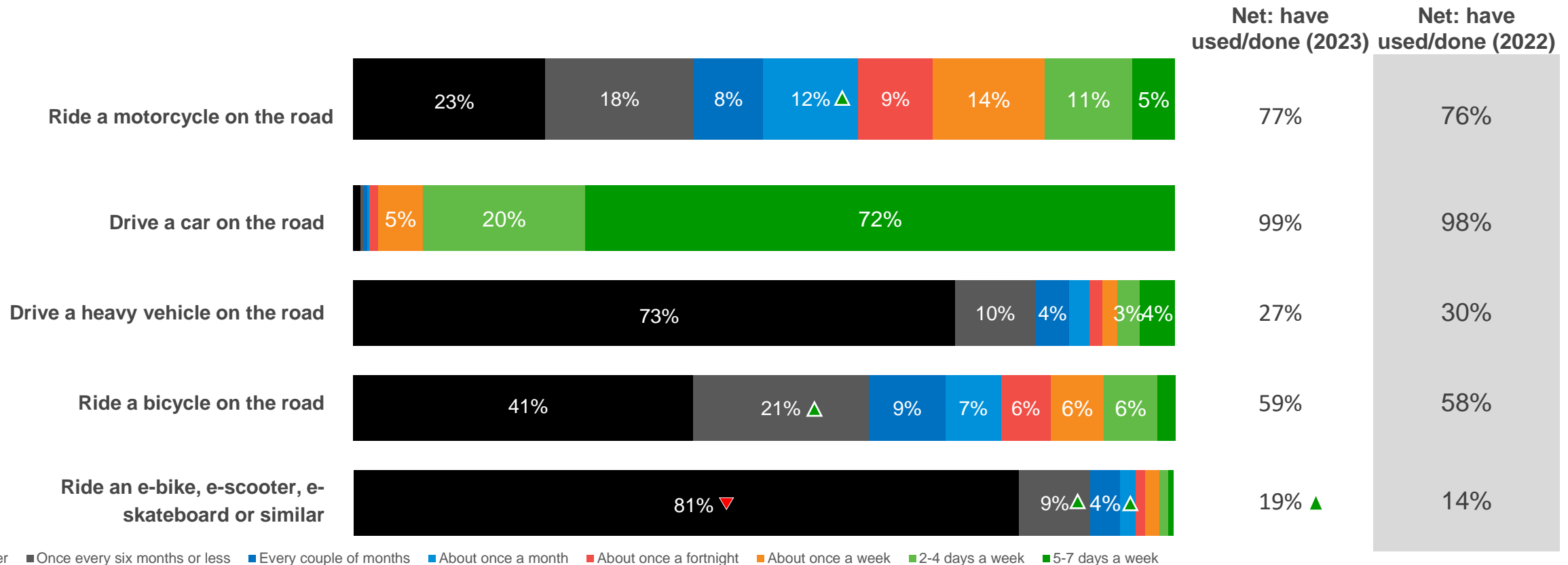


MOTORCYCLE RIDING - SUMMARY

- The Motorcycle Monitor survey of 2023 reveals several key trends in transportation habits. Cars remain the most frequently used mode of transport, with 99% of respondents using them regularly. Motorcycle use is also common with 77% of respondents riding at least occasionally.
- There was a significant increase in e-transport device usage, such as e-bikes, e-scooters, e-skateboards or similar. In 2023, 19% of respondents reported using e-transport devices, up from 14% in 2022.
- Public transportation use also saw a significant increase to 76% in 2023 from 70% in 2022, largely driven by sporadic users.
- In addition, travelling as a motorcycle passenger also increased significantly, from 16% to 20%, year-on-year. However, it remains one of the least used transport modes.
- In terms of motorcycle usage, the proportion of respondents who rode a motorcycle in the last 12 months remained steady at 69%, with younger respondents (18-39 years), males and those with a probationary or learner's permit more likely than the average respondent to have ridden in the past 12 months. Meanwhile, over one in five (22%) respondents are lapsed riders and fewer than one in ten (8%) are former riders.
- When looking at time spent riding, most of the time is spent riding for recreational purposes (on road) (51%) and commuting (25%). Eighteen percent (18%) of the time is spent riding for recreational purposes (off-road) while 6% of the time is spent riding for working purposes (excl. commuting).
- In terms of motorcycle type ridden most often, cruisers were the most popular in 2023, seeing a significant increase year-on-year (18% in 2023 vs 14% in 2022).
- Finally, no longer owning a motorcycle, changes in lifestyle or family commitments, and preference for other modes of transport continue to be the main reasons for not riding amongst those who haven't ridden in the past 12 months. Meanwhile, safety concerns and loss of interest are the main reasons for those who have stopped riding and do not intend to ride again.

GETTING ABOUT

Similar to the results seen in 2022, the primary mode of transport used by the respondents of the Motorcycle Monitor survey remains the car. Ninety-nine percent of respondents use a car for general transportation, driving regularly, 5 to 7 days a week. As expected with the target audience, the motorcycle is also a popular means of transportation for most respondents, with 77% reporting riding at least occasionally – a statistic that has remained relatively steady year-on-year. In 2023, there was a significant increase in the proportion of respondents who ride e-transport devices. Nearly two in ten (19%) respondents have used an e-bike, e-scooter, e-skateboard, or similar, compared to only 14% in 2022. More information about this category can be found in the e-transport device section.



Missing cases are excluded in analysis.

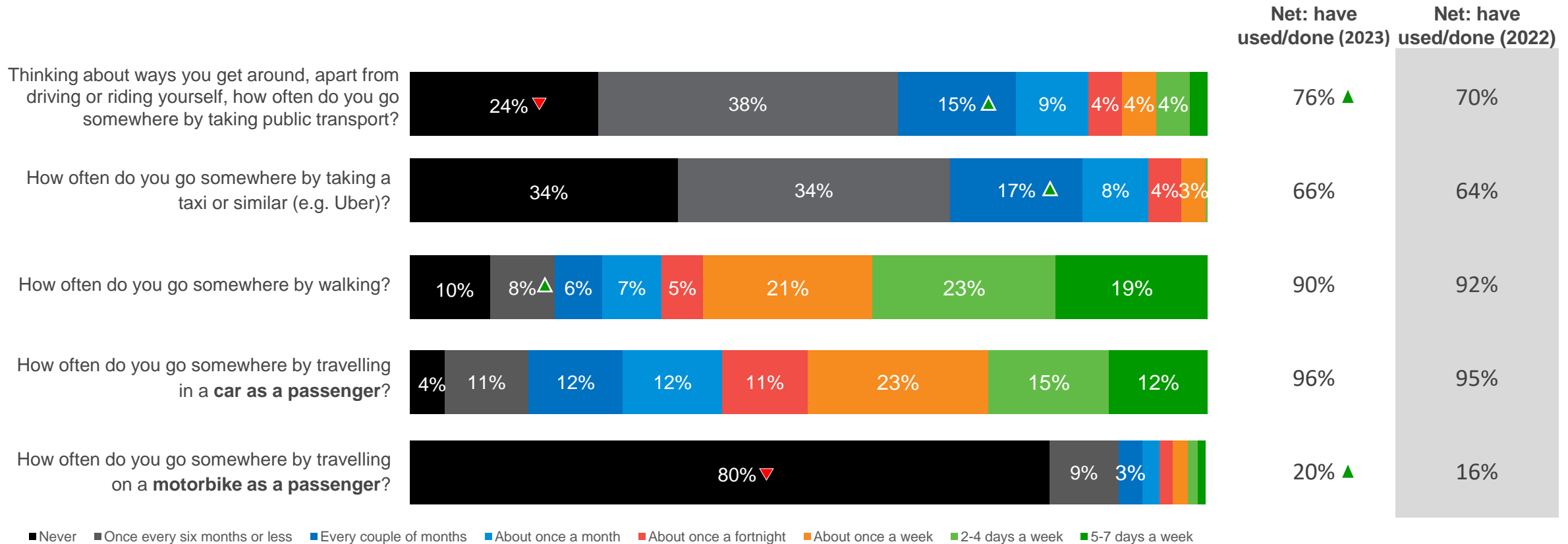
14 – © Ipsos | TAC Motorcycle Monitor - 2023 Note: Data labels for findings under 3% are not presented in charts

Δ ∇ Significantly higher/lower compared to previous year @ 95% c.i.

M2. The following questions are about how often you do a number of things when driving, riding, or getting about in general. Please provide the answer that best describes how often you do these things. We understand it can be difficult to be exact. Base: Total sample Year 2022 n = from 941 to 948, depending on the statement; Year 2023 n = 962. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

GETTING ABOUT (CONT.)

In 2023, the proportion of respondents using public transport also increased significantly to 76% from 70% in 2022. This overall increase is driven by more sporadic users travelling on public transport every couple of months. Travelling on a motorcycle as a passenger also increased significantly year-on-year, from 16% in 2022 to 20% in 2023. However, it remains one of the least used modes of transport.



Missing cases are excluded in analysis.

▲ ▼ Significantly higher/lower compared to previous year @ 95% c.i.

15 – © Ipsos | TAC Motorcycle Monitor - 2023 Note: Data labels for findings under 3% are not presented in charts

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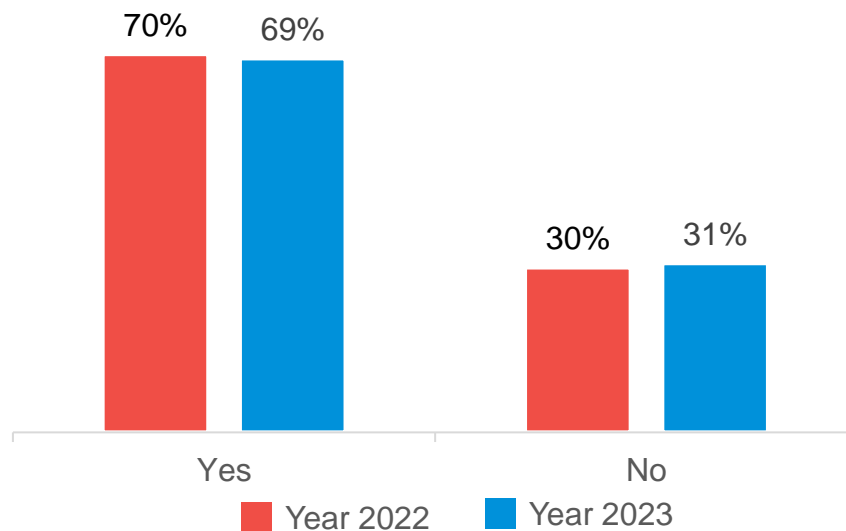
MOTORCYCLE RIDERS



The proportion of respondents who have ridden a motorcycle in the last 12 months remained steady in 2023 at 69%. Similarly, the average time spent riding a motorcycle compared to driving a car is consistent with the results seen in 2022. Differences seen across sub-groups also remain unchanged: respondents aged 40+ years, females, and those holding a full licence are less likely than the average to have ridden a motorcycle in the last 12 months.

Year 2023	Have ridden in the last 12 months
Age	
18-25 years old	95%
26-39 years old	80%
40+ years old	64%
Gender	
Male	71%
Female	57%
Licence type	
Full licence	67%
Probationary licence	97%
Learner's permit	87%

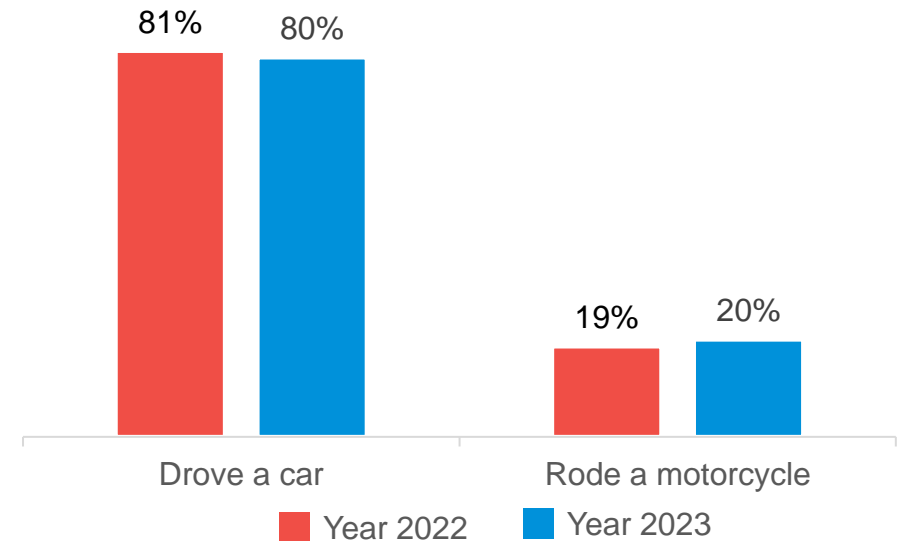
% Who have ridden a motorcycle in last 12 months - Total sample



Significantly higher compared to average @ 95% c.i.

Significantly lower compared to average @ 95% c.i.

Average time spend riding a motorcycle (on or off-road) as opposed to driving a car – Total sample



▲ Significantly higher/lower compared to previous year @ 95% c.i.

Missing cases are excluded in analysis.

16 – © Ipsos | TAC Motorcycle Monitor - 2023

R1. Have you ridden a motorcycle in the last 12 months, either on or off-road? Base: Total sample Year 2022 n= 946; Year 2023 n= 962. / R3. Thinking about your time spent riding and driving over the last 12 months, approximately what percentage of the time would you say you rode a motorcycle (on or off-road) as opposed to driving a car? Base: Have ridden a motorcycle in the last 12 months Year 2022 n= 644.; Year 2023 n= 679 (Weight for both: WEIGHT FINAL (EXCL. R&L STATUS)).



Respondents are primarily **active riders** who have ridden in the last 12 months (70%). Over one in five (22%) respondents are **lapsed riders**, and fewer than one in ten (8%) are **former riders**. Respondents over 40 years and females are significantly more likely than the average to be either lapsed or former riders, while full licence holders are more likely to be lapsed riders. No major changes have been noted year-on-year.

70%
Active Riders

22%
Lapsed Riders

8%

Former Riders

	Year 2022	Year 2023
Never had a break from riding since learning to ride and ride regularly	21%	21%
Never had a break from riding since learning to ride but only ride occasionally	23%	26%
Had a break from riding and have started riding again	17%	15%
Stopped riding and may decide to ride in the future	31%	30%
Stopped riding and do not intend to ride again	8%	8%
Have never ridden a motorcycle but I intend to ride in the future	0.03%	0.39%

Year 2023	Lapsed riders	Former riders
Age		
18-25 years old	5%	1%
26-39 years old	16%	3%
40+ years old	25%	10%
Gender		
Male	21%	7%
Female	31%	13%
Licence type		
Full licence	24%	8%
Probationary licence	3%	0%
Learner's permit	3%	10%

Note: only 1% of Active Riders have not ridden in the last 12 months.

R4. Which of the following best describes your motorcycle riding history? Base: Total sample Year 2022 n= 947; Year 2023 n=962. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

TYPES OF RIDING – ON-ROAD



Ninety-one percent (91%) of those who have ridden in the last 12 months reported riding on the road.

On average, the majority of time is spent riding for recreational purposes on-road (51% of the time, up 3pp YoY), followed by 25% (up 1pp YoY) of the time spent riding for commuting purposes, and only 6% (up 1pp YoY) for working purposes.

When asked about their monthly kilometres, over one in three (35%) said they rode between 101-500 kms, and another third (32%) rode up to 100 kms. Those riding for commuting or working purposes are more likely than the average rider to ride for longer distances, between 501-1,000 kms per month.

Average percentage of time spent riding...

51%

25%

6%

RECREATION ON-ROAD

COMMUTING PURPOSES

WORKING PURPOSES (EXCL. COMMUTING)

Average kms ridden on road per month...

	Total		Commuting		Working		Recreation on-road	
	2023	2022	2023	2022	2023	2022	2023	2022
Up to 100kms per month	32%	29%	26%	24%	22%	17%	31%	30%
101-500 kms per month	35%	37%	38%	38%	36%	34%	37%	38%
501-1000 kms per month	12%	14%	16%	18%	23%	18%	13%	13%
1001-1500 kms per month	4%	2%	6% ▲	3%	6%	3%	4%	2%
1501+ kms per month	4%	4%	4%	4%	4%	7%	4%	4%
Don't know	12%	14%	10%	13%	10% ▼	22%	11%	12%

▲▼ Significantly higher/lower compared to previous year @ 95% c.i.

Significantly higher compared to average @ 95% c.i.

Significantly lower compared to average @ 95% c.i.



TYPES OF RIDING – OFF-ROAD

In 2023, the proportion of respondents who ride off-road decreased significantly to 34% from 41% in 2022. However, those who ride exclusively off-road remained relatively steady (9% in 2023 vs 13% in 2022). Similarly, the proportion of the average time spent riding off-road also experienced a significant decrease this year, with off-road recreation representing only 18% of the total time spent riding either on or off the road (down from 23% in 2022). The majority of those who ride a motorcycle off-road only do so for a few hours per month, with 59% reporting up to eight hours of off-road recreational riding per month. This figure is consistent with the previous year.

Average percentage of time spent riding...



Average hours ridden off road per month...

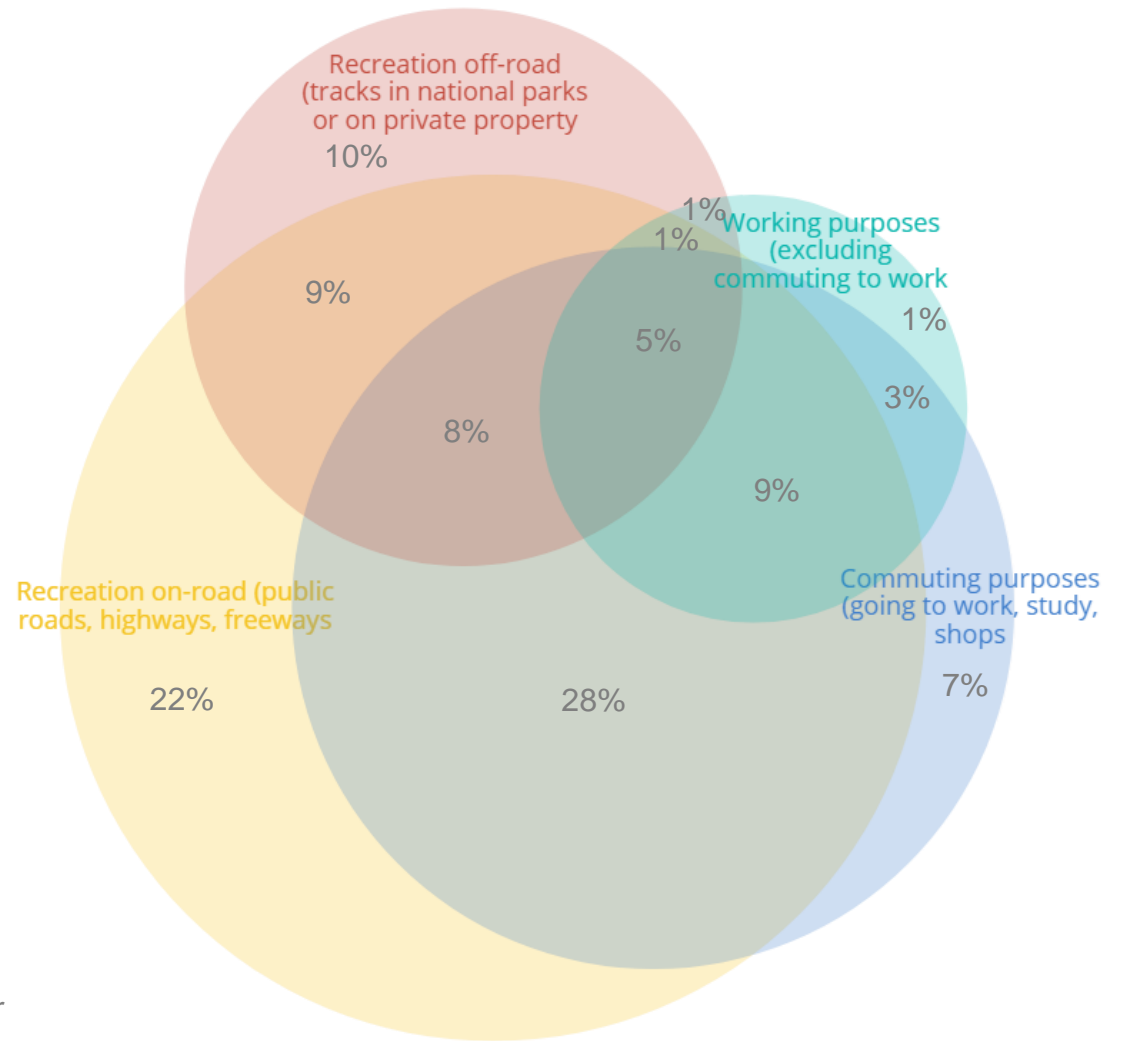
	Total	
	2023	2022
Up to 8 hours per month	59%	59%
9-20 hours per month	8%	12%
21-49 hours per month	9%	9%
50+ hours per month	8%	5%
Don't know	15%	15%

▲▼ Significantly higher/lower compared to previous year @ 95% c.i. ##% Significantly higher compared to average @ 95% c.i.
 ###% Significantly lower compared to average @ 95% c.i.

TYPES OF RIDING – OVERLAP

Similarly, results observed when analysing the proportion of riders by type of riding revealed that the most prevalent type of riding is on-road recreation (i.e., riding on public roads, highways, freeways), with 82% of riders who have ridden in the last 12 months reporting this activity. This is followed by riding for commuting purposes 57%, recreation off-road (i.e., tracks in national parks or on private property), and riding for working purposes at 20%.

The most significant overlap in terms of riding types occurs between on-road recreational riding and commuting. 28% of those who have ridden in the last 12 months reported ridden for both purposes.

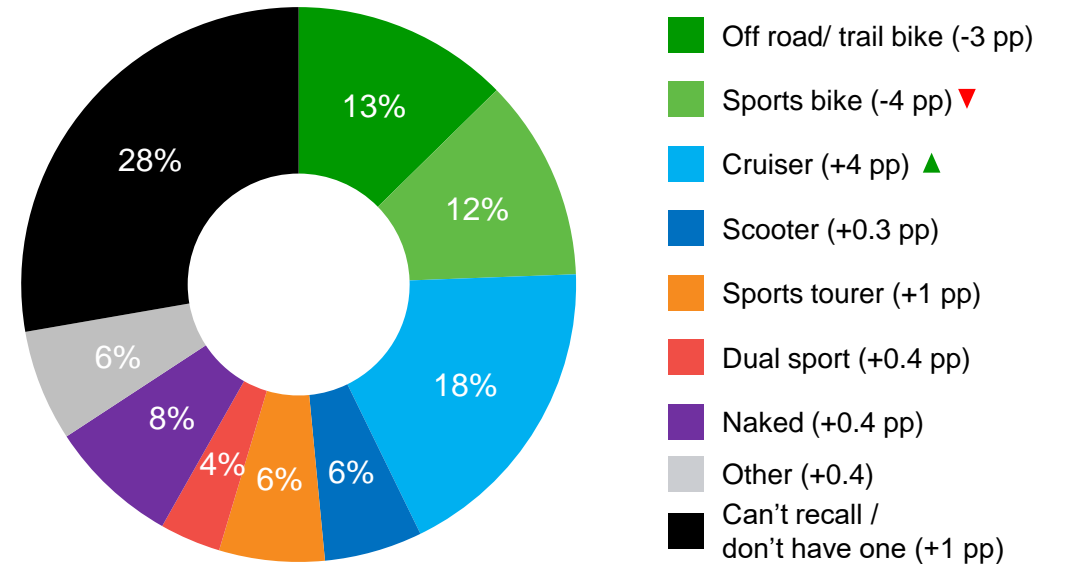


Note: Venn diagrams can only perfectly depict the intersection of three or fewer variables. Diagrams with more than three variables become an approximation.

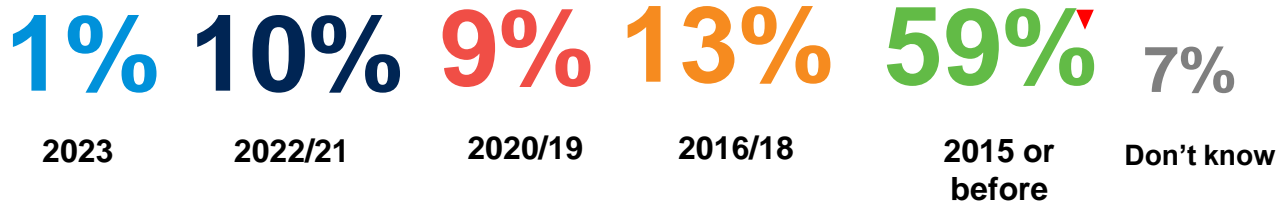
PRIMARY MOTORCYCLE RIDDEN

In terms of the types of motorcycles respondents ride most often, cruisers were the most common in 2023, increasing significantly to 18% from 14% in 2022. Off-road/trail bikes and sports bikes follow as the most common types ridden (13% and 12% respectively), though these figures are below those seen in 2022.

The majority of respondents (59%) ride a bike manufactured in 2015 or prior, and approximately eight in ten (80%) ride a bike with an engine capacity of 251-700 cc (40%) or 700cc+ (41%).



Manufactured year



Engine Capacity



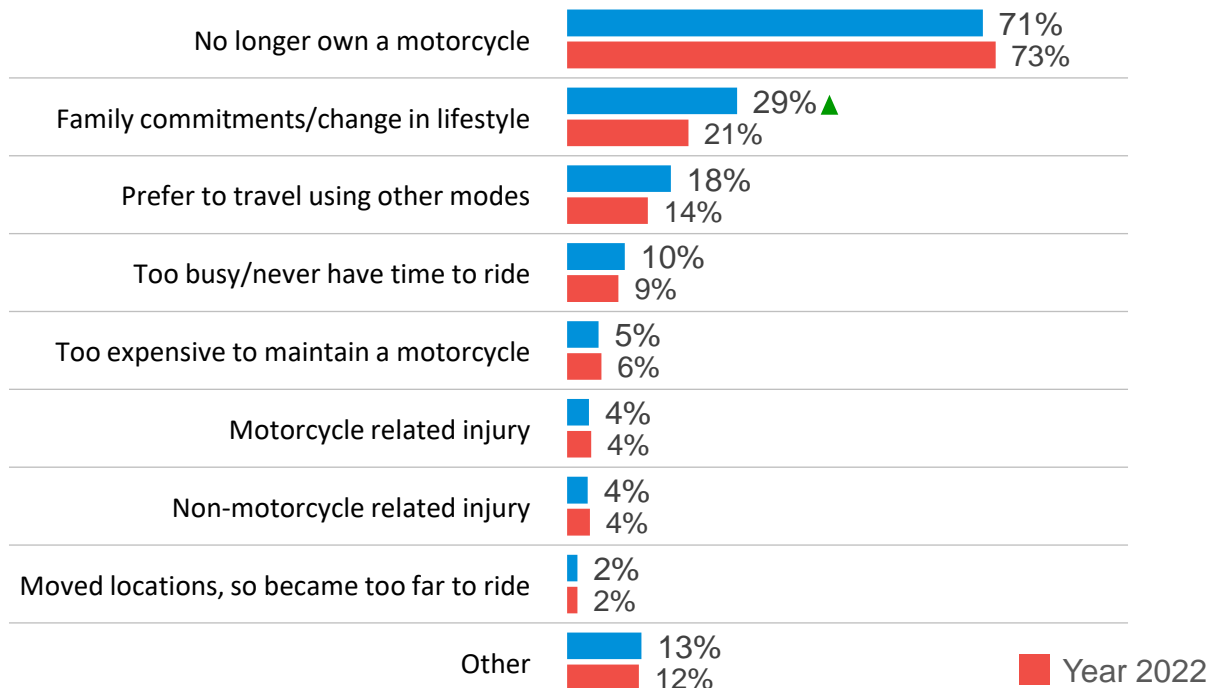
▲▼ Significantly higher/lower compared to previous year @ 95% c.i.

REASONS FOR NOT RIDING

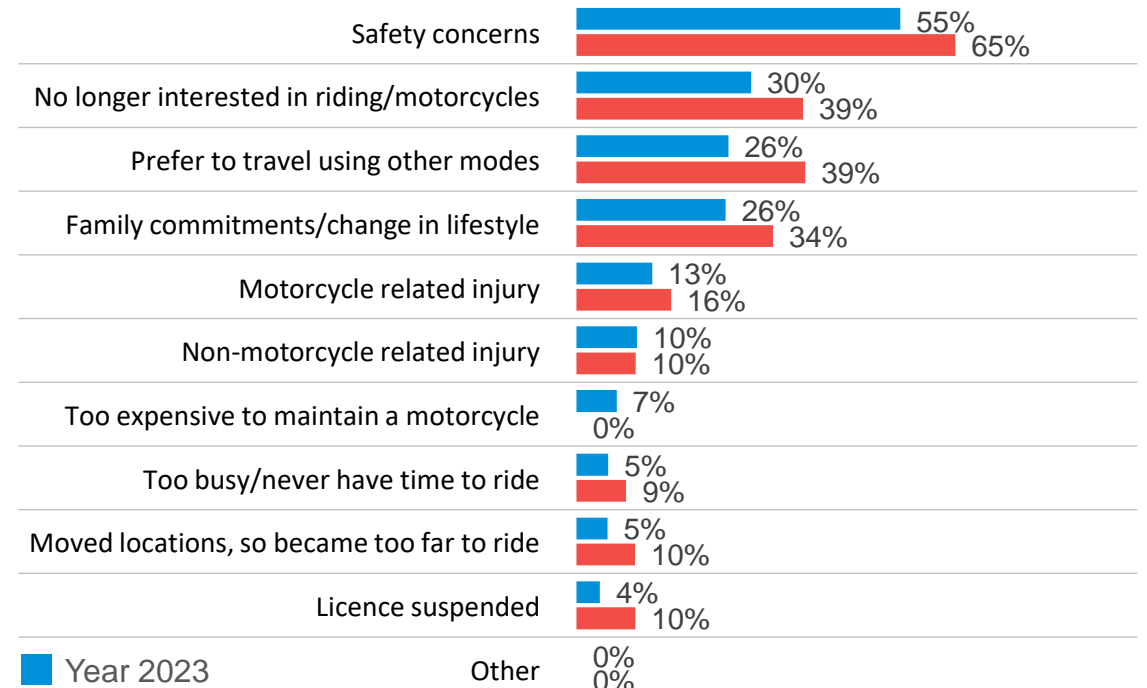


Among those who haven't ridden a motorcycle in the last 12 months, the main reasons for not riding are no longer owning a motorcycle (71%), changing lifestyle or family commitments (29%), and preference for other modes of transport. In 2023, the proportion of respondents attributing a change in lifestyle or family commitments as the reason for not riding increased significantly from 21% in 2022. For those who have stopped riding and do not intend to ride again, the main reasons are safety concerns (55%), a loss of interest in riding or motorcycles (30%), and a preference for other modes of transport (26%).

Main reasons for not riding a motorcycle in the past 12 months



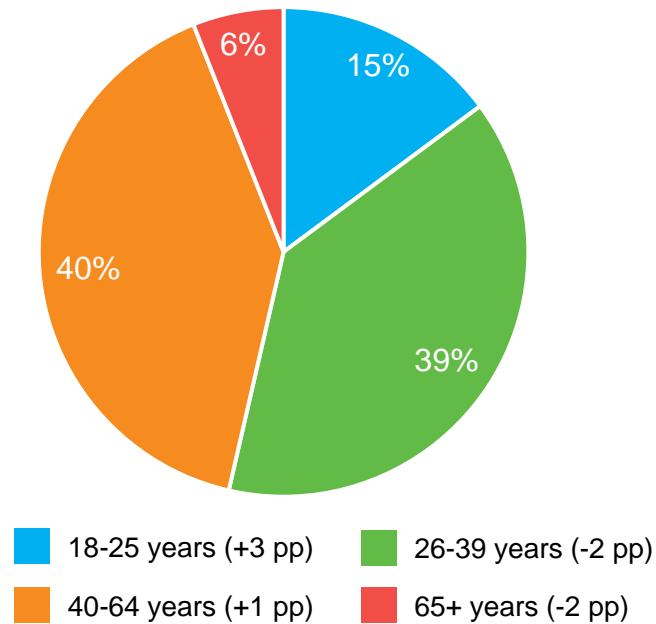
Main reasons for stopping riding with the intention of not riding again



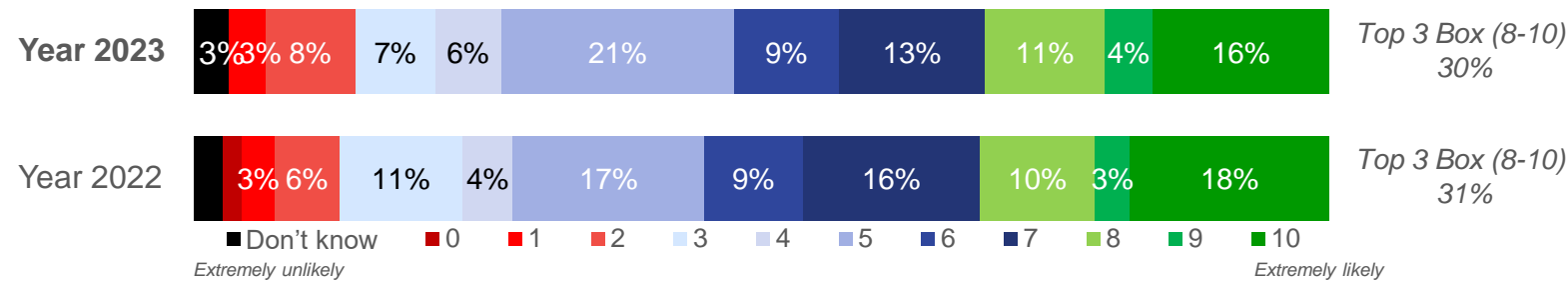
AGE WHEN STOPPED RIDING AND LIKELIHOOD OF RIDING AGAIN

More than half (54%) of the riders who stopped riding were between 18-39 years when they ceased riding. An additional 40% stopped riding when they were between 40-64 years old. Among those who have stopped but may decide to ride again in the future, the likelihood of them riding again is moderate, with three in ten (30%) indicating they were likely to ride again (through rating their likelihood of riding again at or above 8 out of 10).

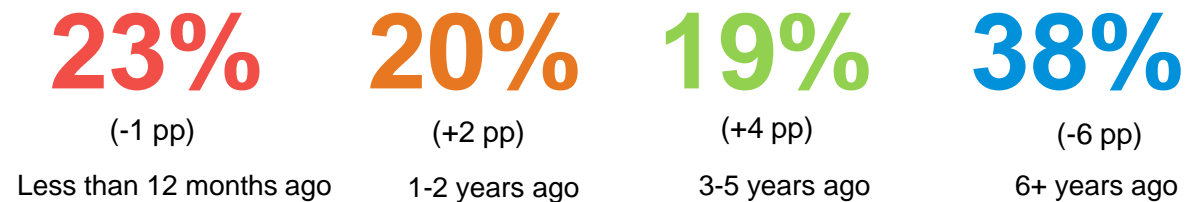
Age of riders when they stopped riding



Likelihood of riding again in future...



Just under 4-in-10 (38%) respondents that had a break and started riding again said the break was more than 6 years ago and almost 1-in-4 (23%) said the most recent break was less than 12 months ago...



▲ ▼ Significantly higher/lower compared to previous year @ 95% c.i.

Missing cases are excluded in analysis.

R6. [HAS STOPPED RIDING AND MAY DECIDE TO RIDE IN THE FUTURE] What is the likelihood that you will ride again in the future? Base: Stopped riding and may decide to ride again in the future Year 2022 n=286; Year 2023 n=277. | R5. [HAD A BREAK FROM RIDING AND HAS STARTED RIDING AGAIN] Approximately, how long was the most recent break? ? Base: Stopped riding but has started riding again Year 2022 n=151; Year 2023 n=136. | *R8. How old were you when you stopped riding? Base: Stopped riding (may decide to ride again in the future or do not intend to ride again) Year 2022 n=347; Year 2023 n=350. Weight: WEIGHT FINAL (EXCL. R&L STATUS). Note: R8 results for Year 2022 were revised and updated in 2023.



LEARNING TO RIDE

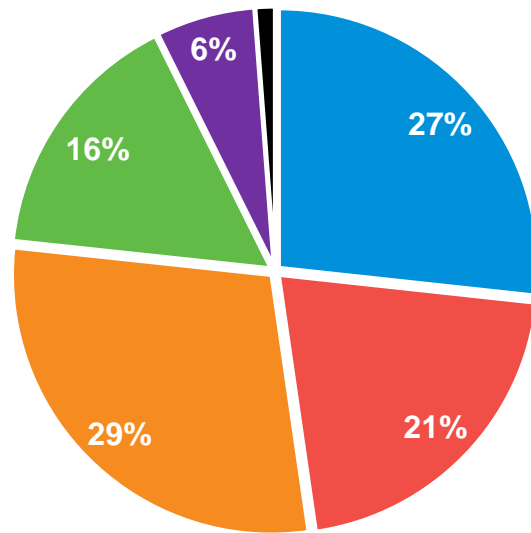
LEARNING TO RIDE - SUMMARY

- Motorcycle Monitor results about 'learning to ride' remain relatively steady year-on-year.
- Most riders begin learning to ride a motorcycle at a young age, with 76% starting before the age of 25.
- Among those who have ridden in the last 12 months, 74% keep their motorcycle skills up to date, with YouTube, motorcycle websites, and friends and family being the most common sources for skill refreshment.
- The primary reason for respondents to attend a motorcycle training course was to obtain a learner's permit or license, while one in four did so to enhance their riding skills. Interestingly, the number of respondents attending courses to improve racing skills dropped significantly from 9% in 2022 to 5% in 2023.
- There's a general consensus on the importance of maintaining and updating riding skills, with 76% of respondents seeing practice as the most beneficial method. Advanced training courses are also seen as a useful resource, and more than half of the riders expressed an interest in learning more about road safety while riding. These trends remained steady year-on-year.

LEARNING TO RIDE

Similar to the results seen in 2022, most riders begin learning to ride a motorcycle at a young age. Nearly three in ten (27%) respondents started riding when they were under 15 years old, an additional 20% began when they were between 15-17 years old, and 29% started when they were aged between 18-25 years. Conversely, just under one in ten (7%) respondents started riding when they were 40 years or older. Regarding their perceived skill level, the majority of respondents (89%) believe they are better riders compared to the average rider, rating themselves as at least slightly better, better or much better.

Age started riding a motorcycle



- Under 15 years (-6 pp) ■ 15-17 years (+4 pp) ■ 18-25 years (-1 pp) ■ 26-39 years (+3 pp)
- 40-60 years (-0.3 pp) ■ 61-74 years (+1 pp) ■ 75+ years (-0.3 pp)

Level of motorcycle riding skill compared to others



- A much better rider ■ A better rider ■ A slightly better rider ■ An about average rider ■ I don't know

▲ ▼ Significantly higher/lower compared to previous year @ 95% c.i.

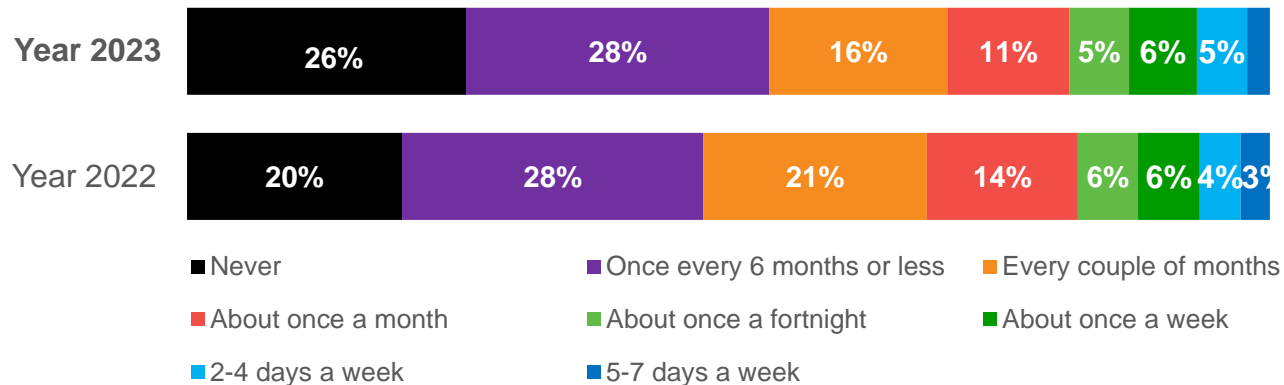
Missing cases are excluded in analysis.

L1. At what age did you start riding a motorcycle? L5. Thinking about how you compare to the average motorcycle rider on Victorian roads, would you say you are ... Base – Ad hoc module: Total sample Year 2022 (Q2 & Q3) n=441; Year 2023 (Q1 & Q2) n=346. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

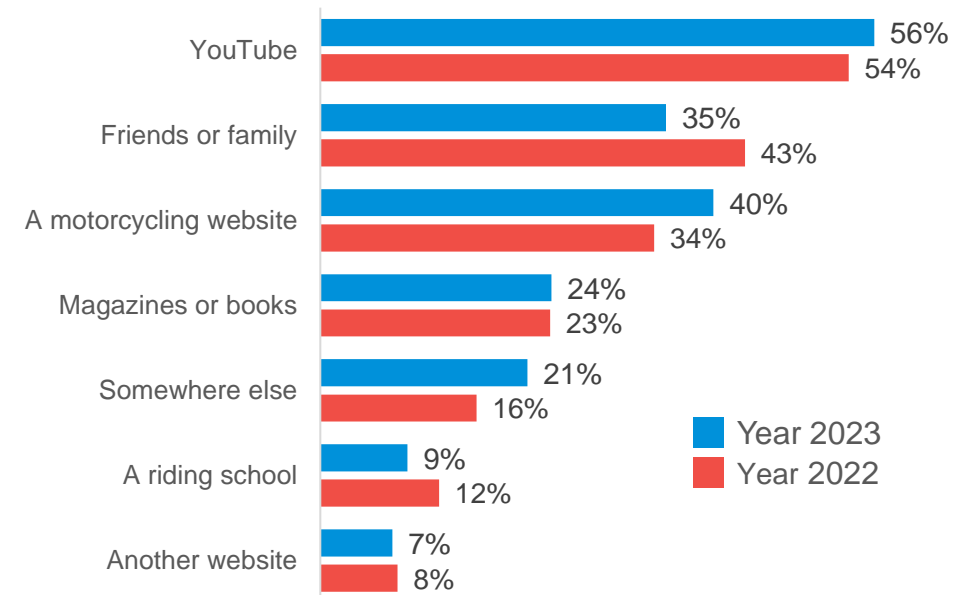
LEARNING TO RIDE – HOW SKILLS ARE MAINTAINED

Among those who have ridden in the last 12 months, over seven in ten (74%, down 6 pp YoY) reported they keep their motorcycle skills up to date. Nearly half (44%) refresh their skills at least every couple of months. The most common resources for skill refreshment are YouTube (56%), visiting motorcycle websites (40%), and learning from friends and family (35%). No significant differences were noted year-on-year.

How frequently motorcycle skills are kept up to date



Resources to brush up on skills



Missing cases are excluded in analysis.

L4. How frequently do you brush up your motorcycle skills to keep up to date with riding? Base – Ad hoc module: has ridden a motorcycle in the last 12 months Year 2022 n=323; Year 2023 n=249.. | L4B. Which of the following resources do you use to brush up on your skills? Base – Ad hoc module: has ridden a motorcycle in the last 12 months and do brush up their skills n=264. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

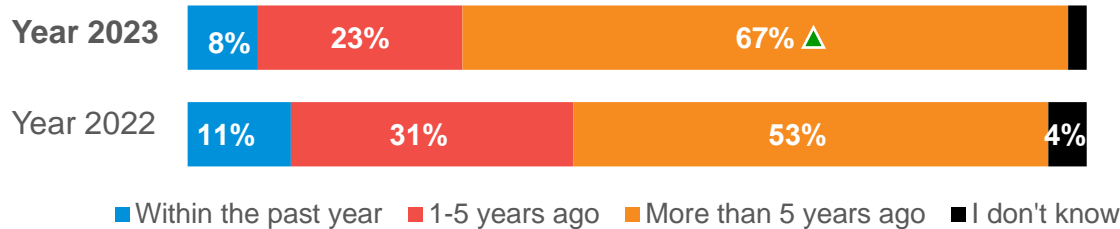
LEARNING TO RIDE – TRAINING

In 2023, the primary reason prompting respondents to attend a motorcycle training course was 'obtaining the learner's permit or licence' (47%). Meanwhile, approximately one in four (24%) did so to improve their riding skills.

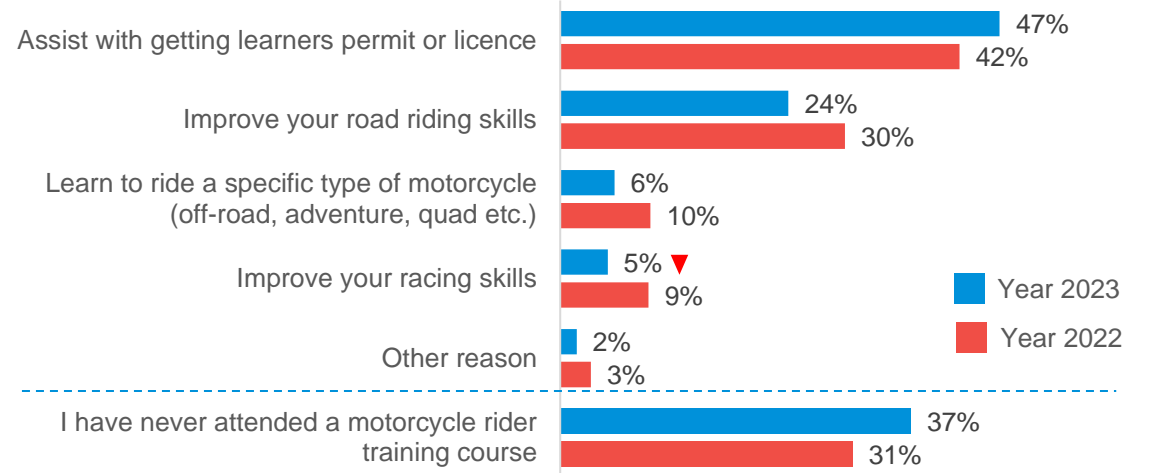
This year, the proportion of respondents who said they attended a course to improve their racing skills dropped significantly to 5% from 9% in 2022.

Of those who attended a training course, over two in five (43%) attended at least one post-licence training and one in five (21%) attended between two and five training courses. Two-thirds (67%) of those who attended at least one course said the most recent training was more than 5 years ago.

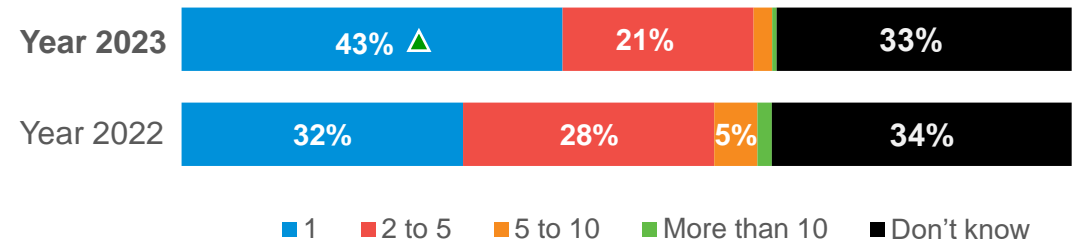
How long ago was the most recent motorcycle training?



Attended a motorcycle training course for any of these reasons?



How many post-licence training courses have you ever attended?

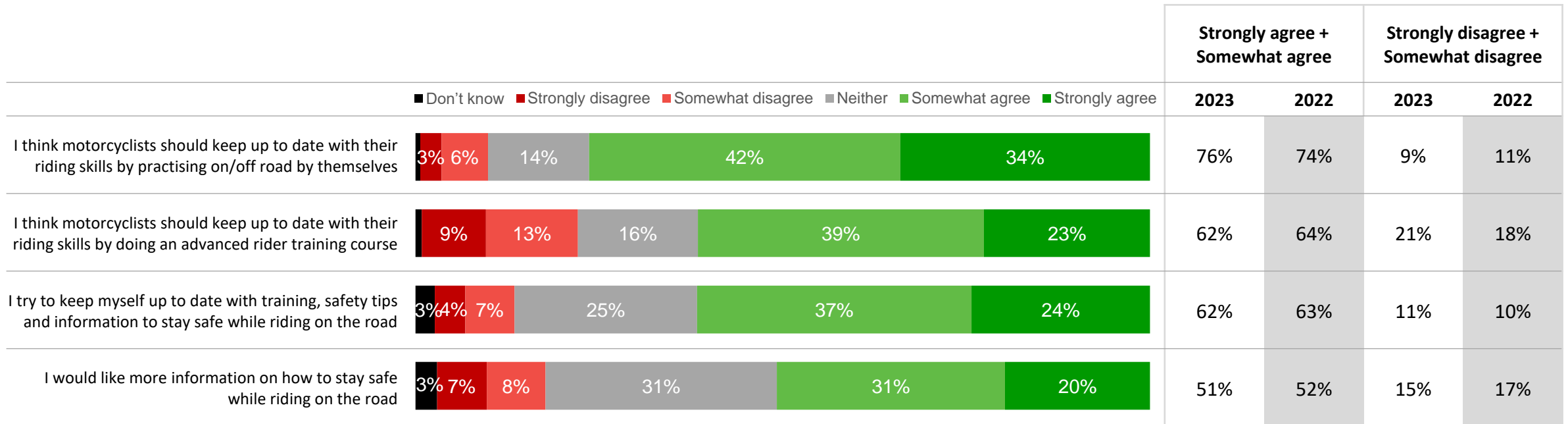


Missing cases are excluded in analysis.

L6. Have you ever attended a motorcycle rider training course for any of the following reasons? Base – Ad hoc module: has ridden a motorcycle in the last 12 months Year 2022 n=323; Year 2023 n= 334. | L7. How long ago did you most recently attend a motorcycle training course? L8. How many post-licence training courses have you ever attended? Base – Ad hoc module: Attended a motorcycle training course Year 2022 n=222; Year 2023 n= 212. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

ATTITUDES WHEN RIDING A MOTORCYCLE

Overall, there is an agreement that riders should keep their riding skills updated. Practising is seen as the most useful way to maintain riding skills, with most respondents (76%) agreeing with this statement. Advanced training courses are also seen as a resource for staying updated (62%), albeit to a lesser extent. Lastly, there is interest from riders in keeping their skills up to date, with over six in ten (62%) already doing so, and half (52%) expressing a desire to learn more about road safety while riding. No significant differences were seen year-on-year.



Missing cases are excluded in analysis.

AT. To what extent do you agree or disagree with the following statements? Base: Year 2022 n=946; Year 2023 n= 962. Weight: WEIGHT FINAL (EXCL. R&L STATUS)..

MOTORCYCLE RIDING – BEHAVIOURS AND ATTITUDES



MOTORCYCLE RIDING BEHAVIOURS AND ATTITUDES- SUMMARY

Riding after drinking alcohol

- The proportion of riders pulled over by the police in the previous 12 months remains unchanged, with breath-testing for alcohol being the most common reason. Most riders avoid riding a motorcycle if they believe they might be over the legal blood alcohol limit. One in four respondents said they had ridden a motorcycle after drinking, but thinking they were under the legal limit at least once.
- Aligning with riding and drinking behaviours, the perception of risk while riding over the legal blood alcohol limit is higher compared to the perceived risk of riding when you know or think you are under the legal blood alcohol limit.
- In addition, the perception of the number of standard alcoholic drinks riders could have and still consider riding seem divided. Over half of the respondents (54%, up 4 pp YoY) think riding after drinking one or two standard drinks is acceptable, while over two in five (43%, down 5 pp YoY) wouldn't ride after drinking any alcohol.

Speeding

- The perception of risk associated with speeding is higher in 60km/h zones than in 100km/h zones. Most riders have not been caught speeding in the last 12 months, and the tolerance for speeding varies among riders, with some thinking the limit should be up to 65 km/h in a 60 km/h zone and between 101-105km/h in a 100 km/h zone.
- Aligning with the perceived risks associated with speeding, instances of moderate speeding behaviours have been identified. Riders tend to avoid speeding more than 3 km/h over the posted speed limit, and overall, are more likely to avoid speeding when riding in 60 km/h zones.

MOTORCYCLE RIDING BEHAVIOURS AND ATTITUDES- SUMMARY

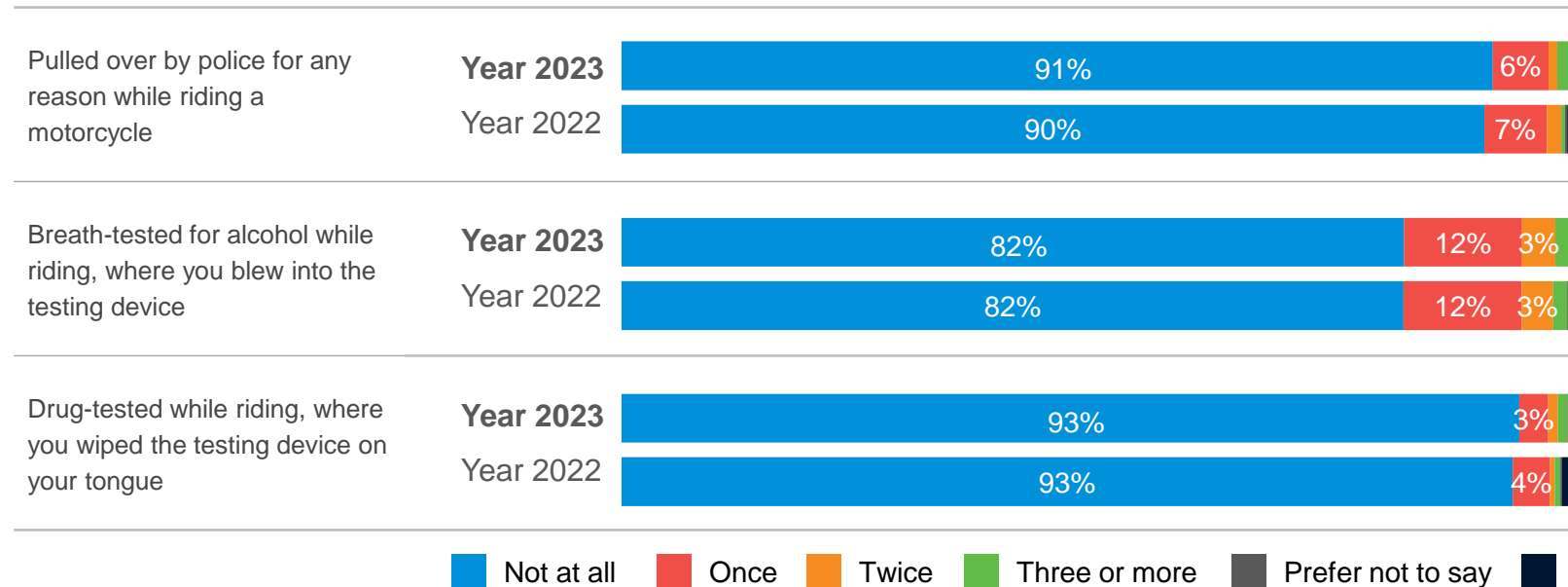
Other behaviours when riding a motorcycle

- Regarding other behaviours, there is an increased use of headphones, Bluetooth or in-helmet systems for both listening to music and talking on the phone in 2023. Younger riders are significantly more likely to use these tools to listen to music.
- In terms of usage of protective motorcycle gear, the proportion of riders who never ride without wearing protective gear has decreased over the past year, yet most riders still avoid riding without protective gear. Similarly, the perceptions around the danger of using devices while riding and riding without protective gear have softened, but still remains a concern for riders.
- Finally, the perception that drivers are not always aware of motorcyclists and don't understand what it's like to be a motorcyclist has strengthened in 2023 when compared to 2022.

RIDING BEHAVIOURS

The proportion of respondents claiming to have been pulled over by the police in the past 12 months remains unchanged year-on-year, with a relatively low proportion of respondents stating they have been pulled over by the police or tested (either for alcohol or drugs) while riding a motorcycle in the past 12 months. Breath-testing for alcohol is the most common reason for riders to be stopped on the road, a trend that is consistent across different types of riders i.e. those riding for commuting, working, or recreational purposes.

Behaviours when riding in the past 12 months...



	Commuting		Working		Recreation on-road	
	Net: have been pulled over/ tested					
	2023	2022	2023	2022	2023	2022
Pulled over by police for any reason while riding a motorcycle	10%	12%	16%	14%	9%	9%
Breath-tested for alcohol while riding, where you blew into the testing device	23%	22%	22%	27%	20%	19%
Drug-tested while riding, where you wiped the testing device on your tongue	9%	7%	10%	13%	7%	5%

Missing cases are excluded in analysis.

POL. In the past 12 months, how many times have you been... Base: Have ridden a motorcycle in the last 12 months base Year 2022 n=663; Year 2023 n=679; Base: Sum at TYP IS 100% - Commuting Year 2022 n=374; Year 2023 n=408; Working Purposes Year 2022 n=127; Year 2023 n=141; Recreating on-road Year 2022 n=524; Year 2023 n=559; Recreating off-road Year 2022 n=258; Year 2023 n=229. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

DRINKING WHILE RIDING

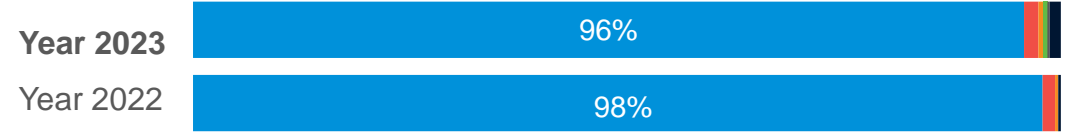
When examining drinking and driving behaviours, most respondents said they don't ride a motorcycle when they believe they might be over the legal blood alcohol limit (96%, down 2pp YoY).

Riding a motorcycle after drinking, when they think they are under the legal blood alcohol limit, is also avoided by the majority of respondents (74%, down 4pp YoY). However, one in four (25%) respondents said they have done so at least once in the past 12 months. This figure is up by 5 pp year-on-year, albeit not significantly.

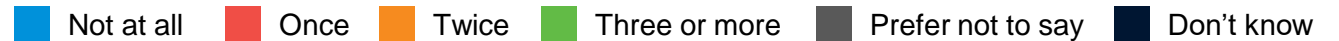
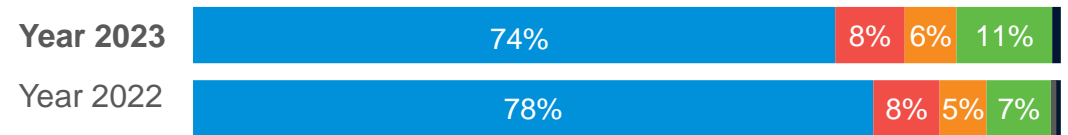
When looking at the perception of the number of standard alcoholic drinks riders could have and still consider riding, perceptions were divided. Over half of the respondents (54%, up 4 pp YoY) think riding after drinking one or two standard drinks is acceptable, while over two in five (43%) wouldn't ride after drinking any alcohol.

Riding when drinking alcohol?

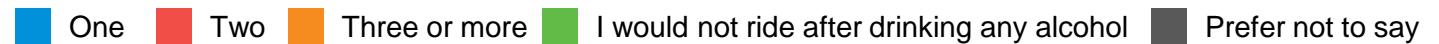
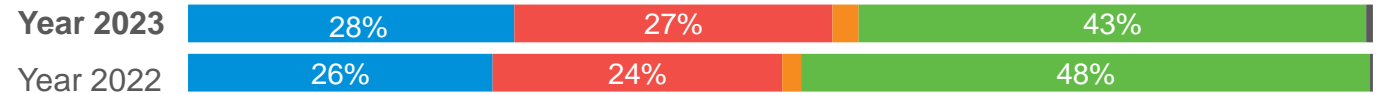
Ridden a motorcycle when you knew or thought you were **over your legal blood alcohol limit**, even slightly? (i.e., 0 or 0.05 BAC)?



Ridden a motorcycle after drinking alcohol when you knew or thought you were **under the legal blood alcohol limit**?



Highest number of standard alcoholic drinks riders would have and still consider riding?

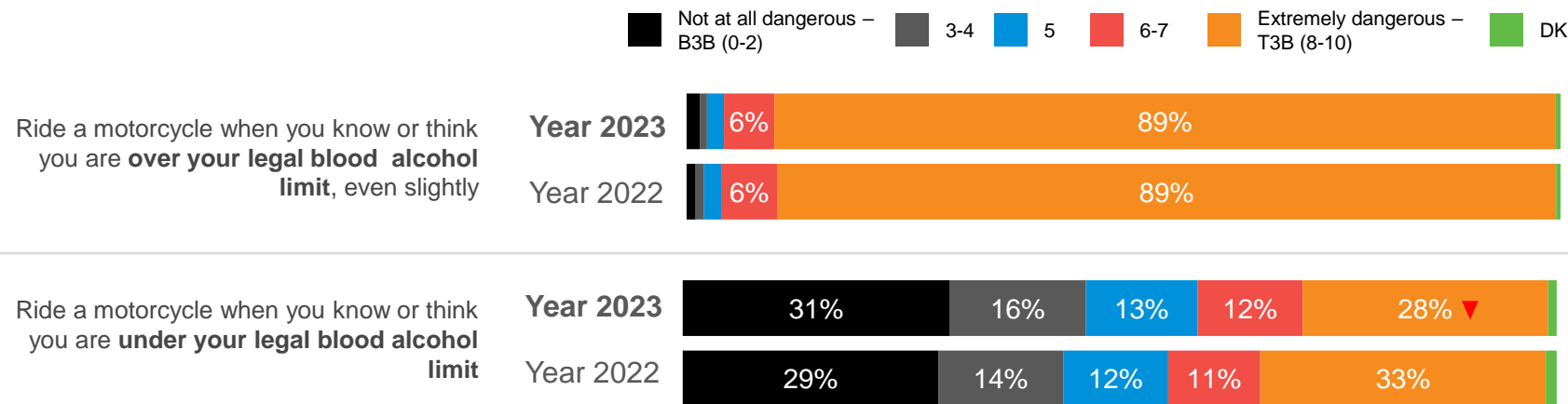


ALC. In the last 12 months, how many times have you...ALC2. What is the highest number of standard alcoholic drinks you would have and still consider riding? Base: Have ridden a motorcycle in the last 12 months AND drink alcohol base Year 2022 n=513; Year 2023 n=530. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

ATTITUDES TOWARDS DRINKING WHILE RIDING



In terms of perceptions, riding while over the legal blood alcohol limit is perceived as extremely dangerous by 89% of the respondents. Meanwhile, riding after drinking when you know or think you are under the legal blood alcohol limit is perceived as less dangerous, with fewer than three in ten (28%) respondents thinking it is extremely dangerous to do so. This figure is significantly down year-on-year.



Not at all dangerous – B3B (0-2)		Extremely dangerous – T3B (8-10)	
2023	2022	2023	2022
2%	1%	89%	89%
31%	29%	28% ▼	33%

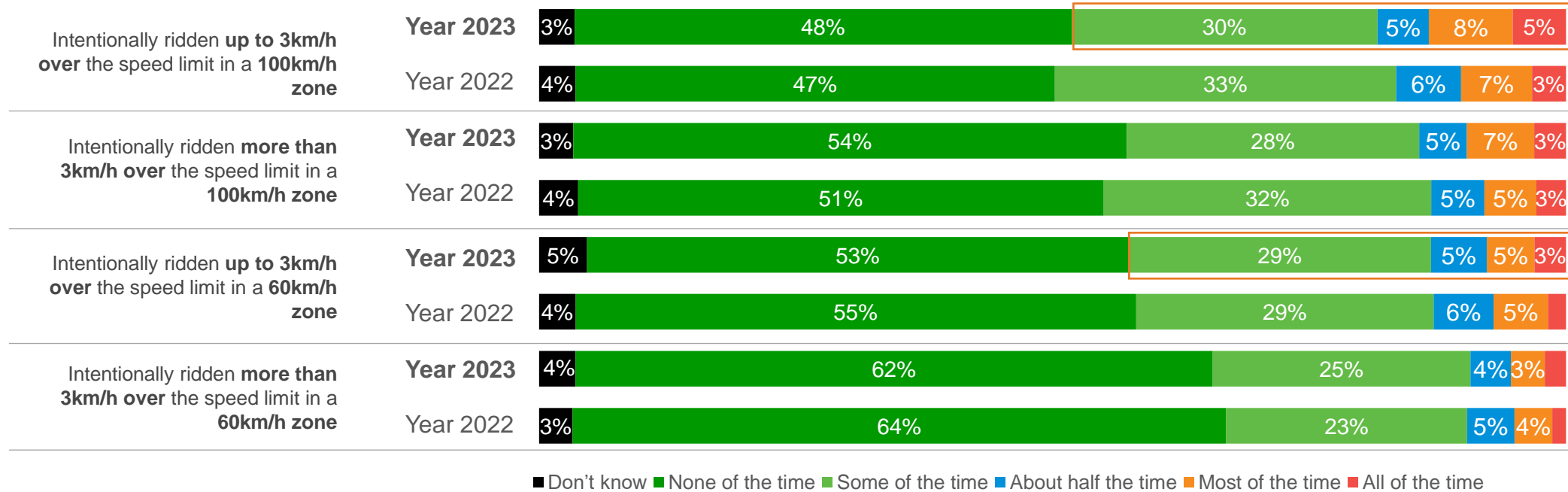
Missing cases are excluded in analysis.

DAN. For each of the following statements, using a scale where 0 is “not dangerous at all” and 10 is “extremely dangerous” how dangerous do you think it is to... Base: Total sample Year 2022 n=946; Year 2023 n=962. Weight: WEIGHT FINAL (EXCL. R&L STATUS).



SPEEDING

Speeding behaviours remain relatively steady from the previous year, with moderate speeding behaviours identified. Across both 100km/h and 60 km/h zones, riders are significantly more likely to intentionally ride up to 3 km/h (at least some of the time) than ride more than 3 km/h over the speed limit. While this behaviour is similar across both zones, riders are more careful with speeding in a 60 km/h zone. Over two in five (43%) said they have ridden up to 3 km/h in a 60 km/h zone compared to 34% who said they have ridden more than 3 km/h in the same zone. Female riders are more cautious when riding in a 100 km/h zone, being significantly more likely than males to avoid speeding.

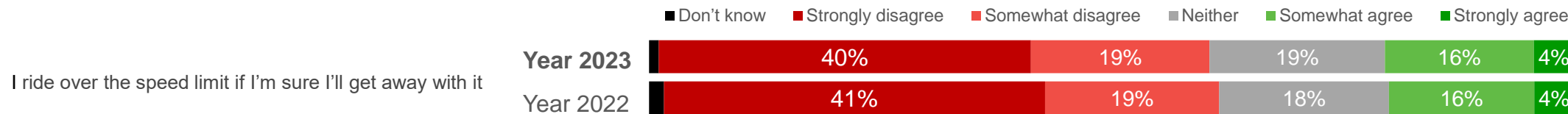
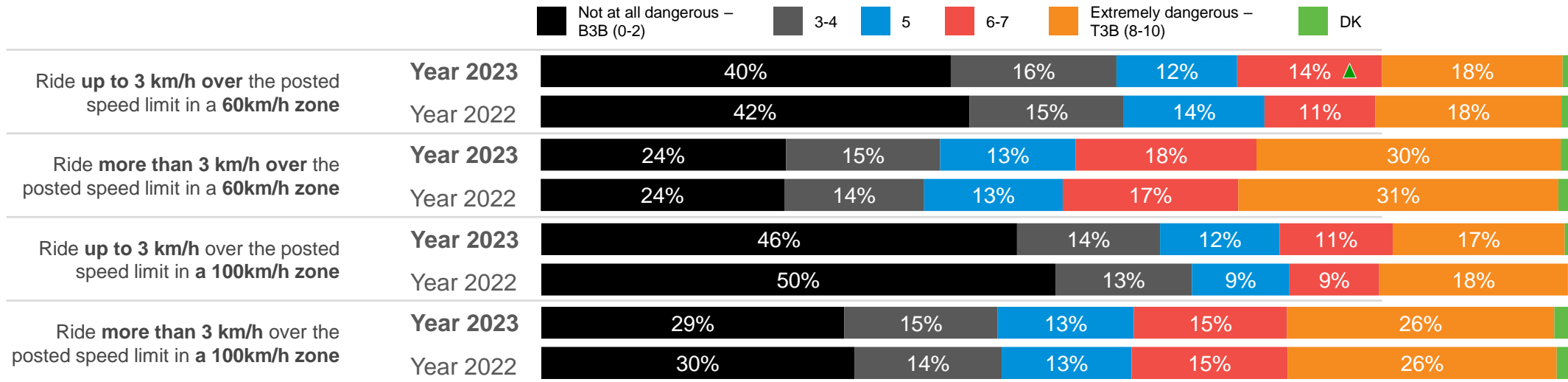


Missing cases are excluded in analysis.

BEH1. Thinking about the last three months, when you were riding, how often have you... Base: Have ridden a motorcycle in the last 12 months; Year 2022 n=672; Year 2023 n=679. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

ATTITUDES TOWARDS SPEEDING

Coinciding with riding behaviours, the perceived risk of speeding more than 3km/h over the posted speed limit is higher than speeding only up to 3km/h. In addition, the perceived risk tends to be slightly higher for 60km/h zones – 30% of respondents think it is extremely dangerous to ride more than 3km/h over the speed limit in a 60km/h zone, compared to 26% that think the same when thinking about 100 km/h zones. In addition, the willingness to ride over the speed limit is low with three in five (59%) respondents disagreeing that they ride over the speed limit if they know they will get away with it.



DAN. For each of the following statements, using a scale where 0 is “not dangerous at all” and 10 is “extremely dangerous” how dangerous do you think it is to... Base: Total sample Year 2022 n=946; Year 2023 n=962. | AT. To what extent do you agree or disagree with the following statements? Base: Weight: Year 2022 n=946; Year 2023 n=962. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

37 – © Ipsos | TAC Motorcycle Monitor - 2023 Note: Data labels for findings under 3% are not presented in charts. Missing cases are excluded in analysis. ▲▼ Significantly higher/lower compared to previous year @ 95% c.i.

SPEEDING

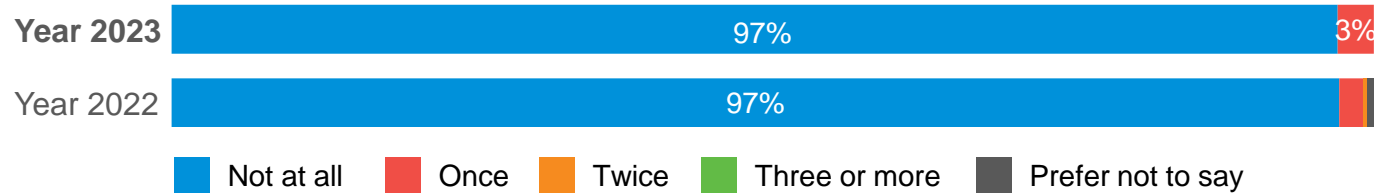
Most riders said they have not been caught speeding in the last 12 months (97%, unchanged YoY).

In terms of the perception of how fast riders should be allowed to ride without being booked, two in five (39%) agree that the limit should be 60km/h, meanwhile over one third (36%) think the limit should be up to 65 km/h before being booked.

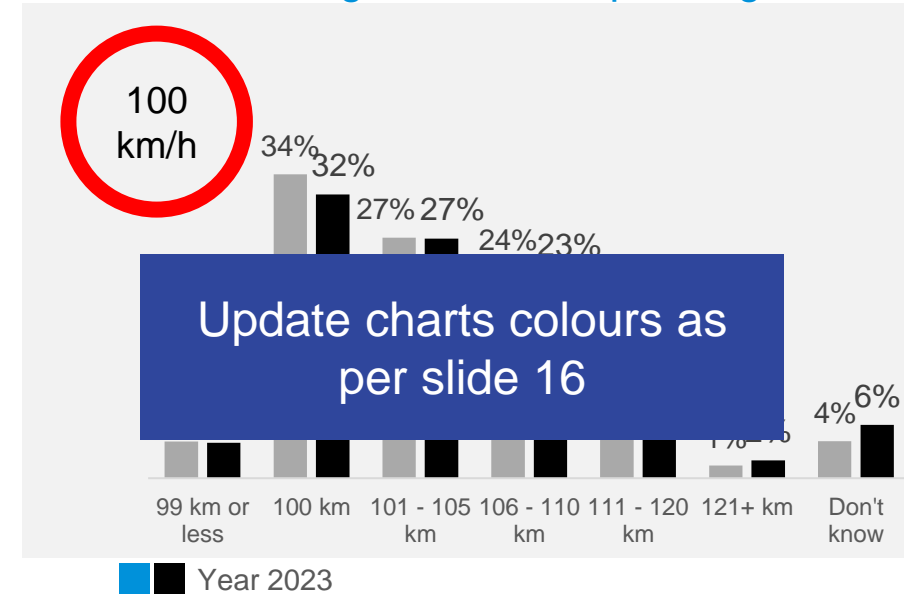
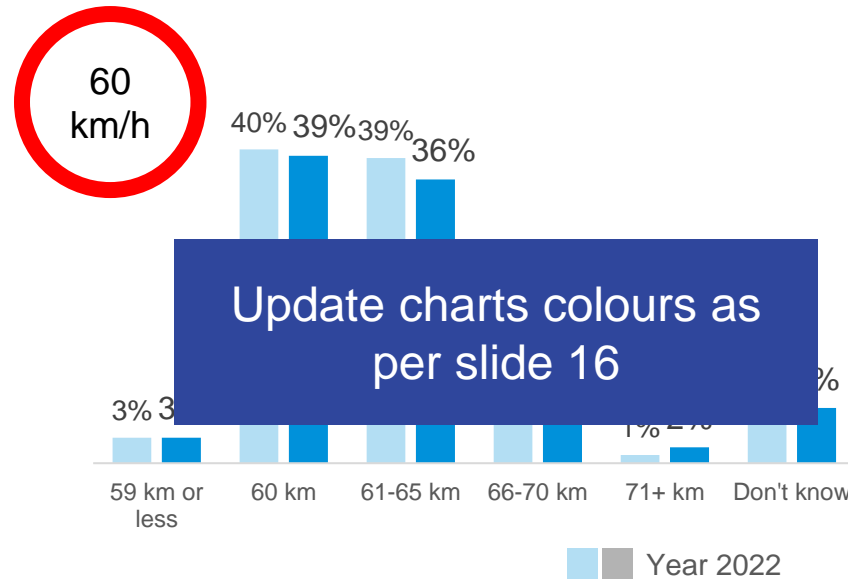
In zones with a 100km/h limit, around one-third (32%) think this is the right limit. Meanwhile nearly three in ten (27%) think it should be between 101-105km/h and a further 23% think it should be between 106-110 km/h.

There are no major differences in perception when compared to results seen in 2022.

Speeding – how many times have you been caught speeding in the last 12 months?



How fast should people be allowed to ride without being booked for speeding?



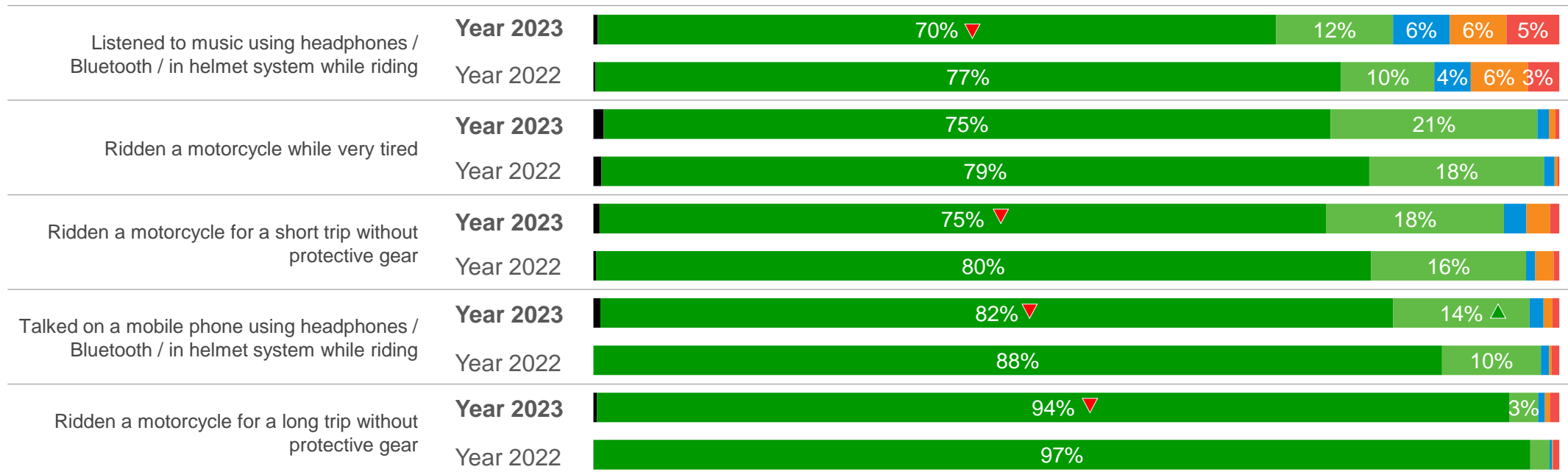
Missing cases are excluded in analysis.

SPE1. How many times have you been caught speeding on your motorcycle in the last 12 months? Base: Have ridden a motorcycle in the last 12 months; Year 2022 n=665; Year 2023 n=679. | SPE2. How fast should people be allowed to ride a motorcycle in a 60km/h zone without being booked for speeding? Base: Have ridden a motorcycle in the last 12 months; Year 2022 n=659; Year 2023 n=679. | SPE4. How fast should people be allowed to ride a motorcycle in a 100km/h zone without being booked for speeding? Base: Have ridden a motorcycle in the last 12 months; Year 2022 n=665; Year 2023 n=640. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

OTHER BEHAVIOURS WHILE RIDING A MOTORCYCLE



Regarding other behaviours, results suggest that the usage of headphones, Bluetooth, or in-helmet systems for both listening to music and talking on a mobile phone has increased significantly in 2023, compared to results seen in 2022. Younger riders (aged 18-25 years) are significantly more likely than the average rider to use these tools to listen to music. In addition, some significant decreases are seen in the proportion of respondent who never ride without wearing protective gear. Despite being significantly below results seen in 2022, most riders still avoid riding long trips (94%) or short trips (75%) without protective gear. Meanwhile, the proportion of riders who do the same for short trips is now sitting at 75%, significantly down from 80% in 2022.



■ Don't know ■ None of the time ■ Some of the time ■ About half the time ■ Most of the time ■ All of the time

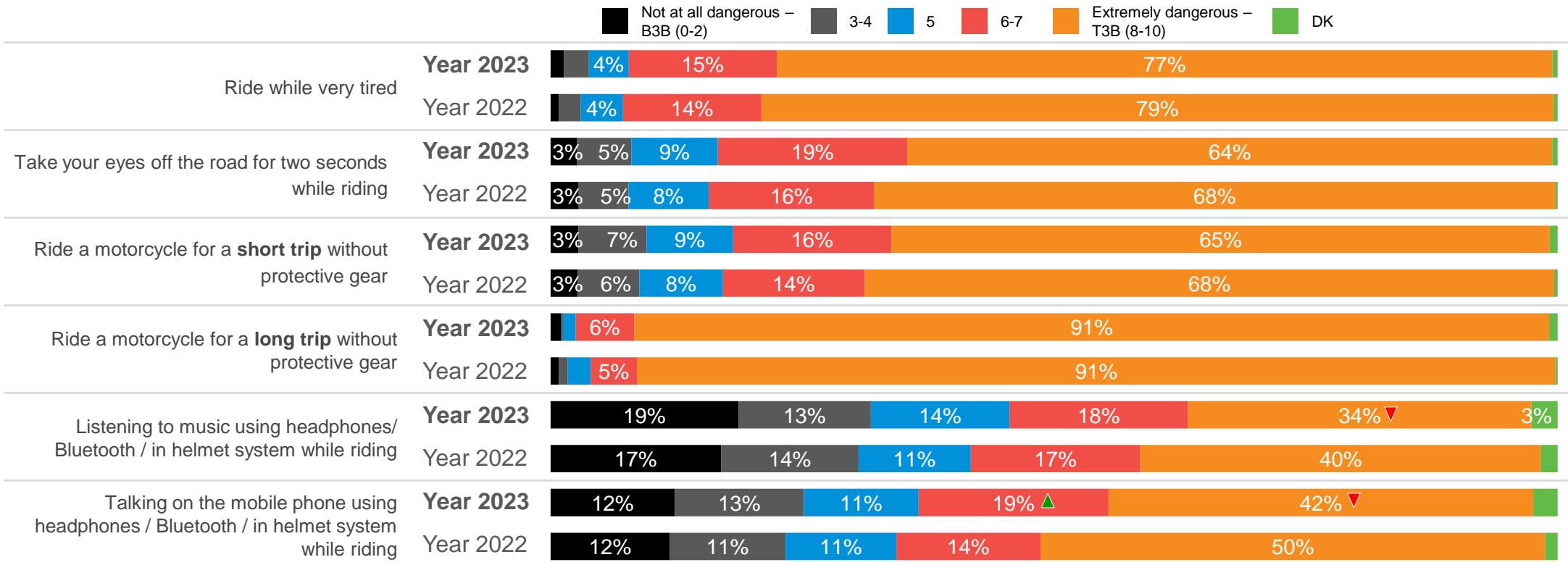
Missing cases are excluded in analysis.

BEH1. Thinking about the last three months, when you were riding, how often have you... Base: Have ridden a motorcycle in the last 12 months Year 2022 n=672; Year 2023 n=679; Weight: WEIGHT FINAL (EXCL. R&L STATUS)



ATTITUDES TOWARDS OTHER BEHAVIOURS

Reflecting the results seen for reported behaviours, significant decreases are seen in the proportion of respondents that think using devices to listen to music or talking on the phone while riding is extremely dangerous. Interestingly, despite seeing an increase in behaviours, the perception of the risk of riding without protective gear for long or short trips remains steady year-on-year.



Missing cases are excluded in analysis.

DAN. For each of the following statements, using a scale where 0 is “not dangerous at all” and 10 is “extremely dangerous” how dangerous do you think it is to... Base: Total sample Year 2022 n=946; Year 2023 n=962.

OTHER ATTITUDES

Finally, the perception that drivers are not always aware of motorcyclists when they are driving and that drivers don't understand what it is like to be a motorcyclist is stronger in 2023, compared to results seen in 2022.

		■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly agree						Strongly agree + Somewhat agree		Strongly disagree + Somewhat disagree	
								2023	2022	2023	2022
The only remedy for feeling very tired while riding is to stop riding and rest	Year 2023							95%	95%	3%	4%
	Year 2022										
Drivers don't understand what it is like to be a motorcyclist	Year 2023							93% ▲	90%	2% ▼	4%
	Year 2022										
Most drivers are unaware of motorcyclists when they are driving	Year 2023							87% ▲	83%	8%	10%
	Year 2022										
Sometimes I must take risks when riding a motorcycle to avoid a dangerous situation	Year 2023							69%	68%	18%	19%
	Year 2022										

AT. To what extent do you agree or disagree with the following statements? Base: Year 2022 n=946; Year 2023 n=962; Weight: WEIGHT FINAL (EXCL. R&L STATUS).



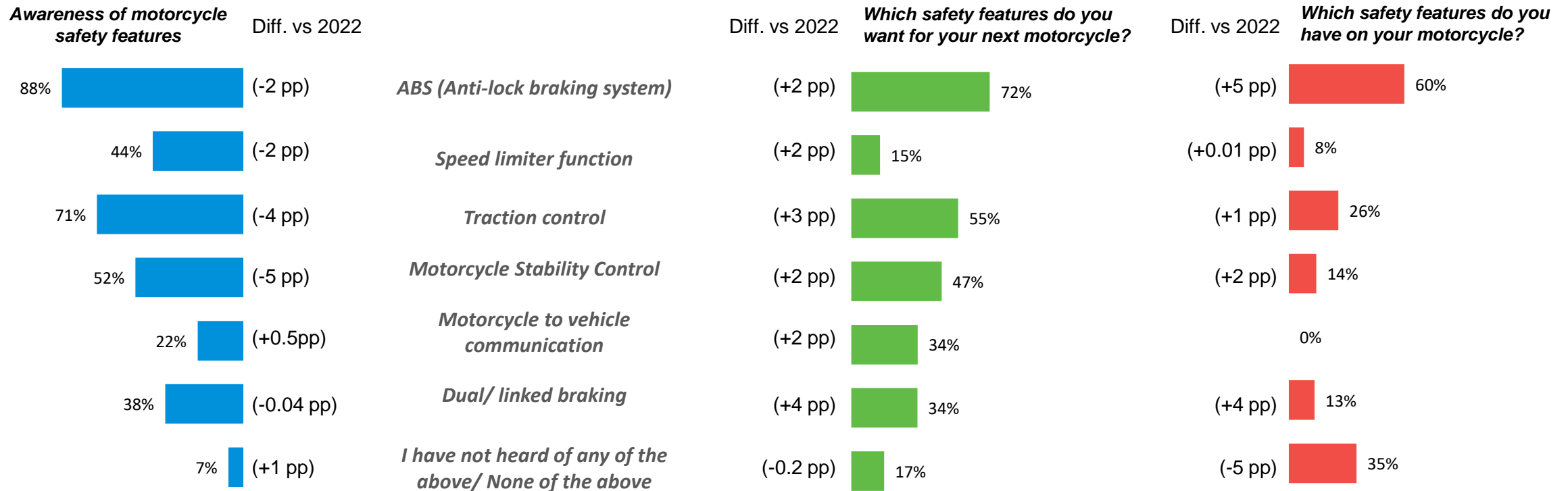
MOTORCYCLE SAFETY

MOTORCYCLE SAFETY - SUMMARY

- ABS (Anti-lock Braking System) is the most recognised safety feature, with 88% of respondents aware of it, followed by traction control (71%), and motorcycle stability control (52%). Notably, younger respondents (18-25 years) and males have a higher awareness of these features. The use of safety features, especially ABS and dual/linking braking, has seen an increase over the past year, albeit not significant.
- In terms of protective gear, helmets remain the most commonly used gear (96%), followed by riding gloves (83%) and riding jackets (72%). Meanwhile, usage of specific riding boots and motorcycle pants is only reported by around half of the respondents (55% and 52%, respectively). One-piece riding suits are less popular, with 83% of respondents never wearing them.
- Quarterly results indicate that most riders wear helmets consistently, with only a small proportion reporting occasional non-use for reasons such as riding short distances or on private property.
- Finally, there is a general consensus among respondents that motorcyclists should always wear motorcycle clothing while riding, with 92% agreeing to this statement.
- Furthermore, the most common strategies for ensuring safety on the road include staying alert, wearing protective gear, and planning trips in advance. In 2023, there was a significant increase in 'trip planning' as a safety strategy, along with avoiding riding while tired and riding in a group.

MOTORCYCLE SAFETY FEATURES

When looking at motorcycle safety features, awareness of ABS (Anti-lock Braking System) remains the most recognised feature among respondents (88%), followed by traction control (71%), and stability control (52%). Year-on-year awareness of motorcycle safety features remains steady. Meanwhile, there are year-on-year increases in the intention to use and usage of nearly all safety features, particularly for ABS and dual/linked braking. Younger respondents (aged 18-25 years) and males are more likely than the average respondent to be aware of most safety features. Younger respondents are also more likely than other age groups to consider using a speed limiter function or dual/linked braking for their next motorcycle.



Missing cases are excluded in analysis.

FEA. Have you heard of any of the following motorcycle safety features? Base: Have ridden a motorcycle in the last 12 months Year 2022 n=664; Year 2023 n=679.

FEA2. Which of these safety features do you have on the road motorcycle you currently ride most often? Base: Have ridden a motorcycle in the last 12 months and bike most often ridden is a road bike or scooter Year 2022 n=463; Year 2023 n=478.

FEA3. Which of these safety features would you want for your next motorcycle? Base: Have ridden a motorcycle in the last 12 months Year 2022 n=661; Year 2023 n=679.

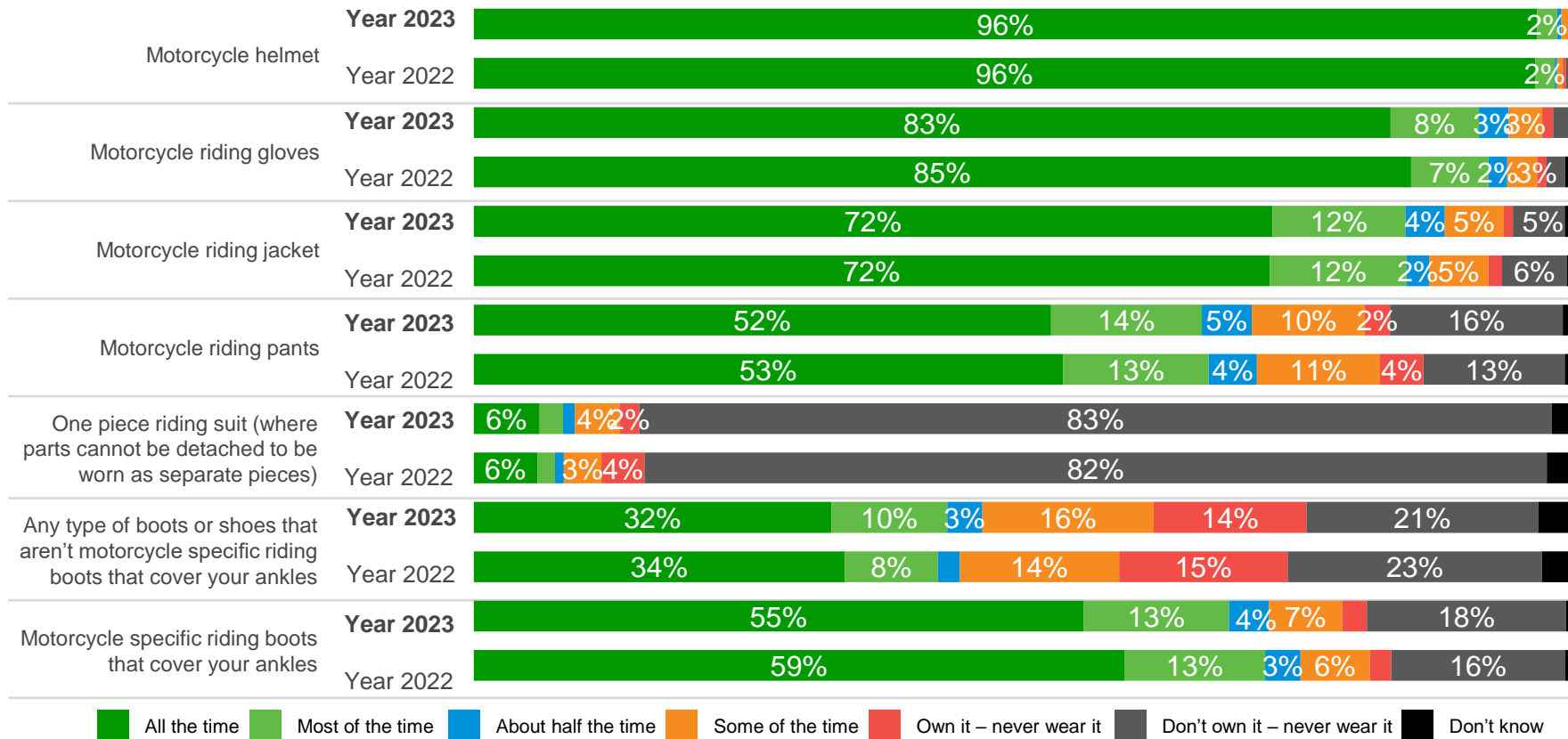
44 – © Ipsos | TAC Motorcycle Monitor - 2023 Note: Data labels for findings under 3% are not presented in charts

(-+ # pp) Percentual point difference vs year 2022

▲▼ Significantly higher/lower compared to previous year @ 95% c.i.

PROTECTIVE MOTORCYCLE CLOTHING

Regarding protective motorcycle gear, helmets are the most commonly used item (96%, steady YoY), followed by riding gloves (83%, down 2pp), and riding jackets (72%, steady YoY). Motorcycle specific riding boots and motorcycle pants are worn all the time by around half of the respondents (55% and 52%, respectively). Conversely, one-piece riding suits are less popular, with more than eight in ten (83%) respondents reporting they never wear this type of gear. In terms of helmet type, most riders (71%) use full-face helmets. However, in 2023 there was a significant increase in the proportion of riders who said they use both open and full-face helmets (18% vs 13%).



Missing cases are excluded in analysis.

45 – © Ipsos | TAC Motorcycle Monitor - 2023 Note: Data labels for findings under 3% are not presented in charts

▲ ▼ Significantly higher/lower compared to previous year @ 95% c.i.

MS Thinking about your riding over the last 3 months, how often do you wear the following items of protective motorcycle clothing? Base: Have ridden a motorcycle in the last 12 months Year 2022 n=664; Year 2023 n=679.
MS2. Thinking about the type of helmet you wear when riding a motorcycle, do you wear a full face helmet or an open face helmet, or both?. Base: Have ridden a motorcycle in the last 12 months Year 2022 n=653; Year 2023 n=676.

Type of helmet used



71%

(-5 pp) ▼

Full face helmet



11%

(-0.1 pp)

Open face helmet

18%

(+5 pp) ▲

Both – open and full face

(+ # pp) Percentual point difference vs year 2022

PROTECTIVE MOTORCYCLE CLOTHING

Seasonality – Quarter-on-Quarter

Looking at results quarter-on-quarter, some differences are seen in the proportion of riders that reported wearing a helmet 'most of the time' in Q4 2023. However, these figures are low, with the majority of riders wearing a helmet all the time.

Among those who ride, at least occasionally, without wearing a helmet, the main reasons for doing so are riding on their own property/off-road and riding short distances.

	Q1'22	Q2'22	Q3'22	Q4'22	Year 2022	Q1'23	Q2'23	Q3'23	Q4'23	Year 2023
Motorcycle helmet										
All the time	94%	97%	98%	97%	96%	97%	97%	98%	94%	96%
Most of the time	4%	1%	0%	2%	2%	1%	2% → 0%	→ 4%	2%	2%
Own it – never wear it	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
Don't own it – never wear it	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%
Motorcycle riding gloves										
All the time	83%	82%	87%	91%	85%	85%	79%	86%	82%	83%
Most of the time	7%	10%	6%	2%	7%	5%	9%	6%	11%	8%
Own it – never wear it	1%	1%	0%	1%	1%	2%	2%	0%	0%	1%
Don't own it – never wear it	2%	2%	1%	1%	2%	0% → 3%	1%	2%	1%	1%
Motorcycle riding jacket										
All the time	72%	71%	71%	77%	72%	76%	69%	76%	69%	72%
Most of the time	11%	12%	15%	11%	12%	8%	13%	10%	16%	12%
Own it – never wear it	1%	2%	0%	2%	1%	1%	0%	0%	2%	1%
Don't own it – never wear it	7%	5%	6%	4%	6%	5%	5%	2%	6%	5%
Motorcycle riding pants										
All the time	50%	54%	51%	64%	53%	51%	49%	54%	54%	52%
Most of the time	12%	14%	13%	15%	13%	15%	12%	13%	15%	14%
Own it – never wear it	7%	2%	3%	3%	4%	4%	1%	2%	2%	2%
Don't own it – never wear it	13%	13%	15%	9%	13%	14%	18%	15%	16%	16%

##% Significantly higher than previous quarter @ 95% c.i.

##% Significantly lower than previous quarter @ 95% c.i.

Missing cases are excluded in analysis.

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MS Thinking about your riding over the last 3 months, how often do you wear the following items of protective motorcycle clothing? Base: Have ridden a motorcycle in the last 12 months 22' Q1 n=215; Q2 n=189; Q3 n=155; Q4 n=105; Year 2022 n=664 | 23' Q1 n=174; Q2 n=149; Q3 n=164; Q4 n=192; Year 2023 n=679.

PROTECTIVE MOTORCYCLE CLOTHING

Seasonality – Quarter-on-Quarter

Similarly, the proportion of riders that have worn a one-piece riding suit and boots or shoes that cover the ankles (both those that were and weren't specific riding boots) remains steady.

	Q1'22	Q2'22	Q3'22	Q4'22	Year 2022	Q1'23	Q2'23	Q3'23	Q4'23	Year 2023
One piece riding suit (where parts cannot be detached to be worn as separate pieces)										
All the time	7%	4%	4%	8%	6%	3%	12%	6%	3%	6%
Most of the time	2%	2%	1%	2%	2%	1%	1%	4%	2%	2%
Own it – never wear it	5%	3%	3%	6%	4%	2%	3%	2%	1%	2%
Don't own it – never wear it	81%	86%	86%	71%	82%	84%	76%	83%	87%	83%
Any type of boots or shoes that aren't motorcycle specific riding boots that cover your ankles										
All the time	35%	32%	31%	39%	34%	35%	33%	31%	31%	32%
Most of the time	9%	9%	9%	6%	8%	7%	11%	11%	12%	10%
Own it – never wear it	13%	19%	14%	15%	15%	16%	14%	11%	15%	14%
Don't own it – never wear it	20%	24%	23%	27%	23%	23%	19%	24%	19%	21%
Motorcycle specific riding boots that cover your ankles										
All the time	54%	57%	55%	78%	59%	54%	58%	56%	54%	55%
Most of the time	16%	12%	15%	6%	13%	13%	12%	14%	13%	13%
Own it – never wear it	2%	3%	2%	0%	2%	4%	2%	3%	1%	2%
Don't own it – never wear it	18%	16%	17%	9%	16%	21%	16%	14%	20%	18%

###% Significantly higher than previous quarter @ 95% c.i.

###% Significantly lower than previous quarter @ 95% c.i.

Missing cases are excluded in analysis.

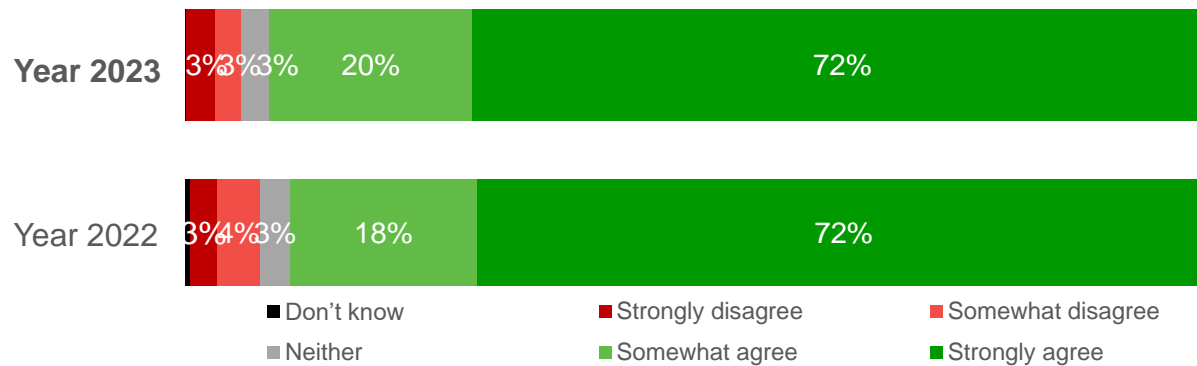
47 – © Ipsos | TAC Motorcycle Monitor - 2023

MS Thinking about your riding over the last 3 months, how often do you wear the following items of protective motorcycle clothing? Base: Have ridden a motorcycle in the last 12 months 22' Q1 n=215; Q2 n=189; Q3 n=155; Q4 n=105; Year 2022 n=664 | 23' Q1 n=174; Q2 n=149; Q3 n=164; Q4 n=192; Year 2023 n=679.

ATTITUDES ABOUT MOTORCYCLE CLOTHING

The agreement that motorcyclists should always wear motorcycle clothing while riding remains steady year-on-year, with nine in ten (92%) respondents agreeing (strongly or somewhat) with this statement.

I think motorcyclists should always wear motorcycle clothing while riding (e.g. jacket, pants, boots and gloves)



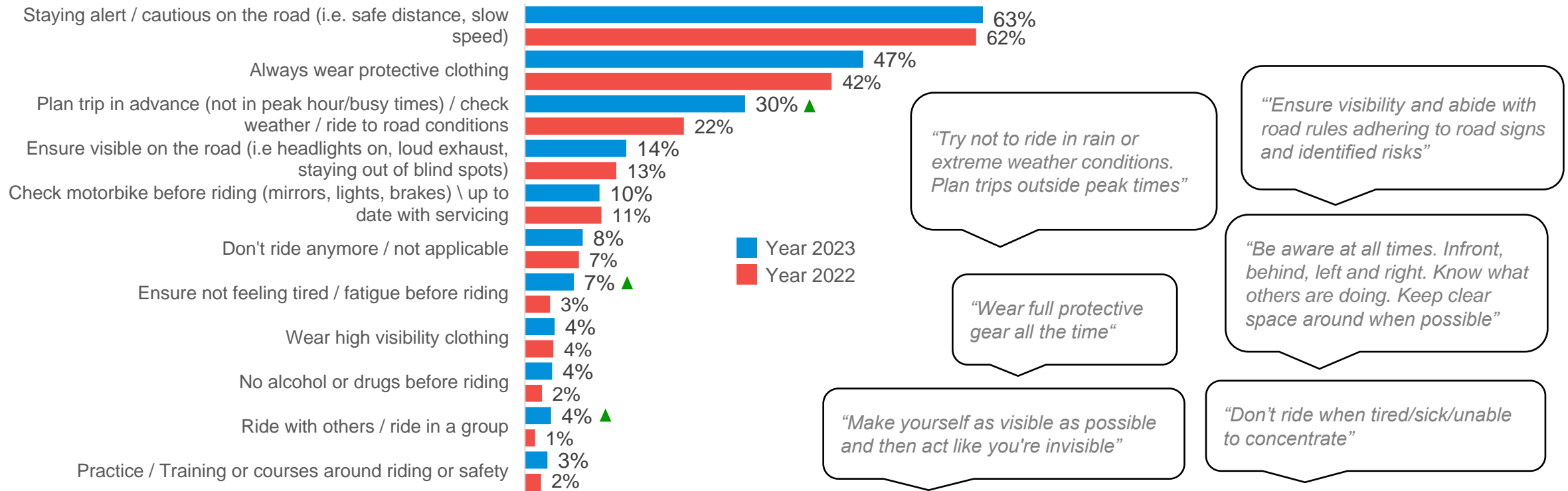
Strongly agree + Somewhat agree	Strongly disagree + Somewhat disagree
92%	5%
90%	7%

Missing cases are excluded in analysis.

AT. To what extent do you agree or disagree with the following statements? Base: Total sample Year 2022 n=946; Year 2023 n=962; Weight: WEIGHT FINAL (EXCL. R&L STATUS).

STRATEGIES USED TO KEEP SAFE WHEN RIDING A MOTORCYCLE ON THE ROAD

In terms of strategies to keep safe when riding on the road, the most common strategies continue to be 'staying alert / being cautious on the road (i.e., safe distance, slow speed)' (63%, up 1 pp YoY), 'wearing protective gear all the time' (47%, up 5 pp YoY), and 'planning the trip in advance' – the latter strategy significantly increased in 2023 with three in ten (30%) respondents saying they use this strategy to keep safe. Avoiding riding while feeling tired/fatigued and riding in a group were more popular in 2023, albeit still at relatively low levels.



Missing cases are excluded in analysis.

SAF1. What strategies do you use to keep safe when riding a motorcycle on the road? This could include how you ride, your bike and clothing, how you plan your trips or something else Base: Total sample Year 2022 n=923; Year 2023 n=961; Weight: WEIGHT FINAL (EXCL. R&L STATUS).

CRASH HISTORY



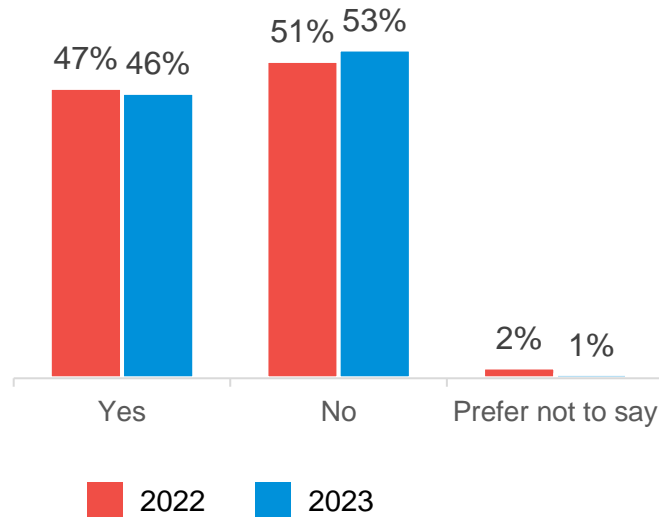
CRASH HISTORY - SUMMARY

- The percentage of respondents who had ever experienced a motorcycle crash was 46%, consistent with the previous year. Half of these incidents happened over 11 years ago (49%), and 8% occurred within the last 12 months.
- Most incidents involved solo riders (74%), and more than half did not involve another vehicle (57%). However, there was a noticeable increase in crashes involving another vehicle in 2023 (43% up from 36% in 2022). Of these, 60% happened at intersections, with 75% attributing the crash (at an intersection) to the other person's failure to give way.
- The results highlight the importance of the assistance received and provided after a crash. Among those who crashed while riding with others, 75% received help from fellow riders, with nearly half (49%) stating that this assistance was crucial to their recovery. About a quarter of respondents (23%) reported providing first aid to a crashed rider, showing no significant change year-on-year.
- In terms of improving road safety, respondents suggested that the TAC should prioritise road maintenance (31%, significantly up YoY), improve road user awareness and education (20%), and improve car driver training and licensing process (14%, significantly up YoY). These suggestions highlight the prevalent perception that car drivers are often unaware of motorcyclists and lack an understanding of their experiences on the road.

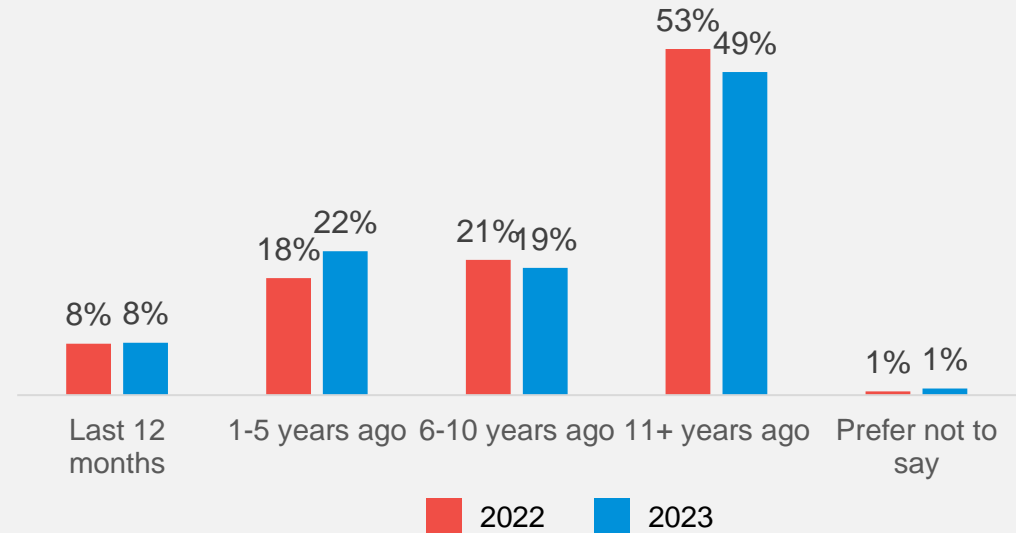
CRASH HISTORY

The percentage of respondents who reported ever having experienced a motorcycle crash in 2023 remained steady year over year (YoY) at 46%. Half of these incidents (49%) occurred 11 or more years ago, and fewer than one in ten (8%) took place within the last 12 months.

Have you ever had a crash while riding a motorcycle?



Timing of last motorcycle crash



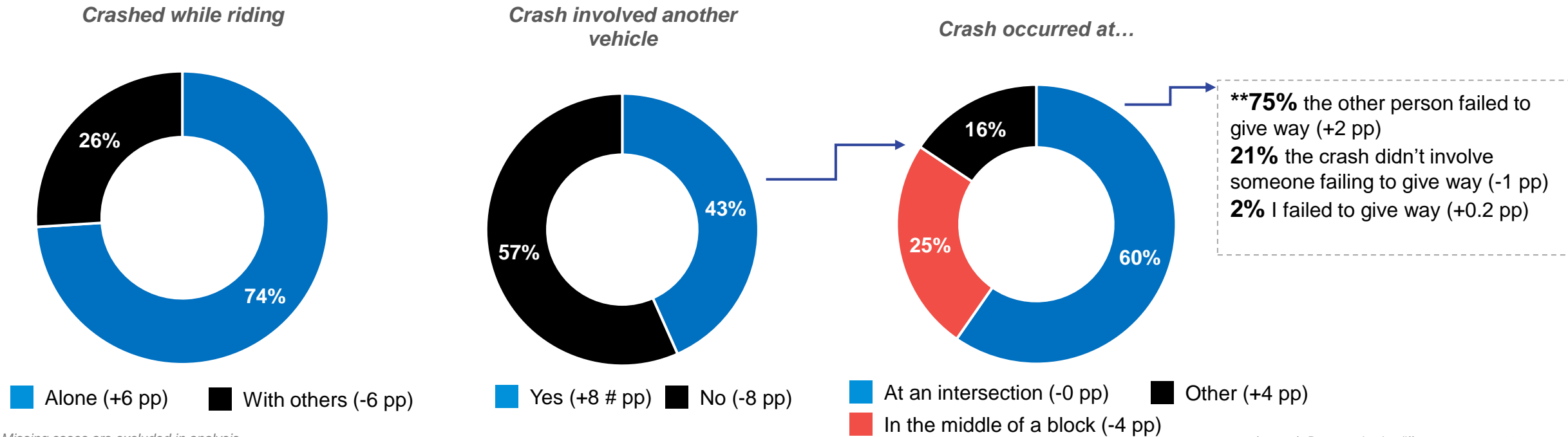
Missing cases are excluded in analysis.

MC7. Have you ever had a crash while riding a motorcycle, not including dropping your bike while stationary and not including a crash that occurred while participating in motorcycle sport? Base : Have ridden a motorcycle in the past Year 2022 n=940; Year 2023 n=959.

Q24. Thinking about the most recent motorcycle crash you were involved in, when did it occur?. Base : Have ridden a motorcycle in the past and had a crash Year 2022 n=420; Year 2023 n=426.

CRASH HISTORY

Similar to the findings reported in 2022, the majority of these incidents involved solo motorcyclists (74%), a figure that saw a slight YoY increase, albeit not significant. While most incidents did not involve another vehicle (57%), 2023 saw a directional increase in crashes involving another vehicle, up from 36% in 2022 to 43%. Among those who reported a crash involving another vehicle, 60% said it occurred at an intersection, and of those, 75% attributed the incident to the other party's failure to yield.



Missing cases are excluded in analysis.

CRA1. In the previous section you mentioned that you have had a crash while riding a motorcycle, thinking about the most recent motorcycle crash you were involved in....Were you riding...? CRA2. Did the crash involve another vehicle Base – Ad hoc module: Have ridden a motorcycle in the past and had a crash Year 2022 n=210; Year 2023 n=162..

CRA3. Was the crash...? Base – Ad hoc module: Crash involved another vehicle Year 2022 n=74; Year 2023 n=70.

CRA4. As far as you can tell, did the crash involve someone failing to give way? Base – Ad hoc module: Crash happened at an intersection Year 2022 n=43; Year 2023 n=42. ****Small sample size, interpret with caution.**

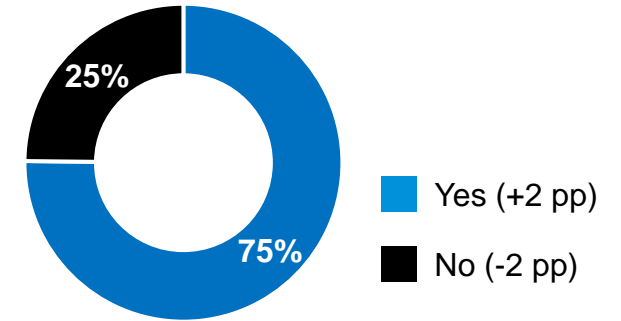
CRASH HISTORY

The experience of receiving assistance after a crash and providing help to another rider showed no significant change YoY.

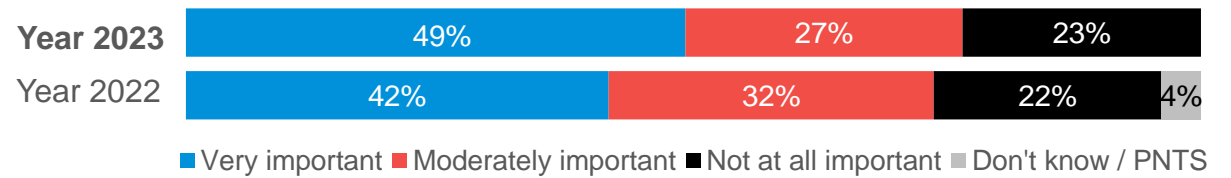
Among those who had crashed while riding with others, 75% reported receiving help from a fellow rider. Nearly half of them (49%) said this assistance was crucial to their recovery, a figure that showed a slight increase from 2022, although not significantly so.

In terms of giving assistance, nearly one in four respondents (23%) reported providing first aid to a crashed rider, including those they were riding with and others. This figure remained consistent YoY.

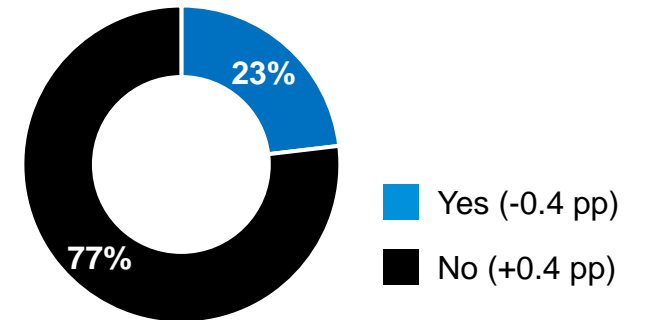
*Received assistance from someone they were riding with after crashing?**



*How important was assistance in your recovery?**



Provided assistance to a rider who had crashed?



(-+ # pp) Percentual point difference vs year 2022

Missing cases are excluded in analysis.

CRA5. Did you receive assistance from someone you were riding with after crashing your motorcycle? Base – Ad hoc module: Crashed while riding with others Year 2022 n=68; Year 2023 n=40.

CRA6. How important was that assistance in your recovery? Base – Ad hoc module: Received assistance Year 2022 n=50; Year 2023 n=30.

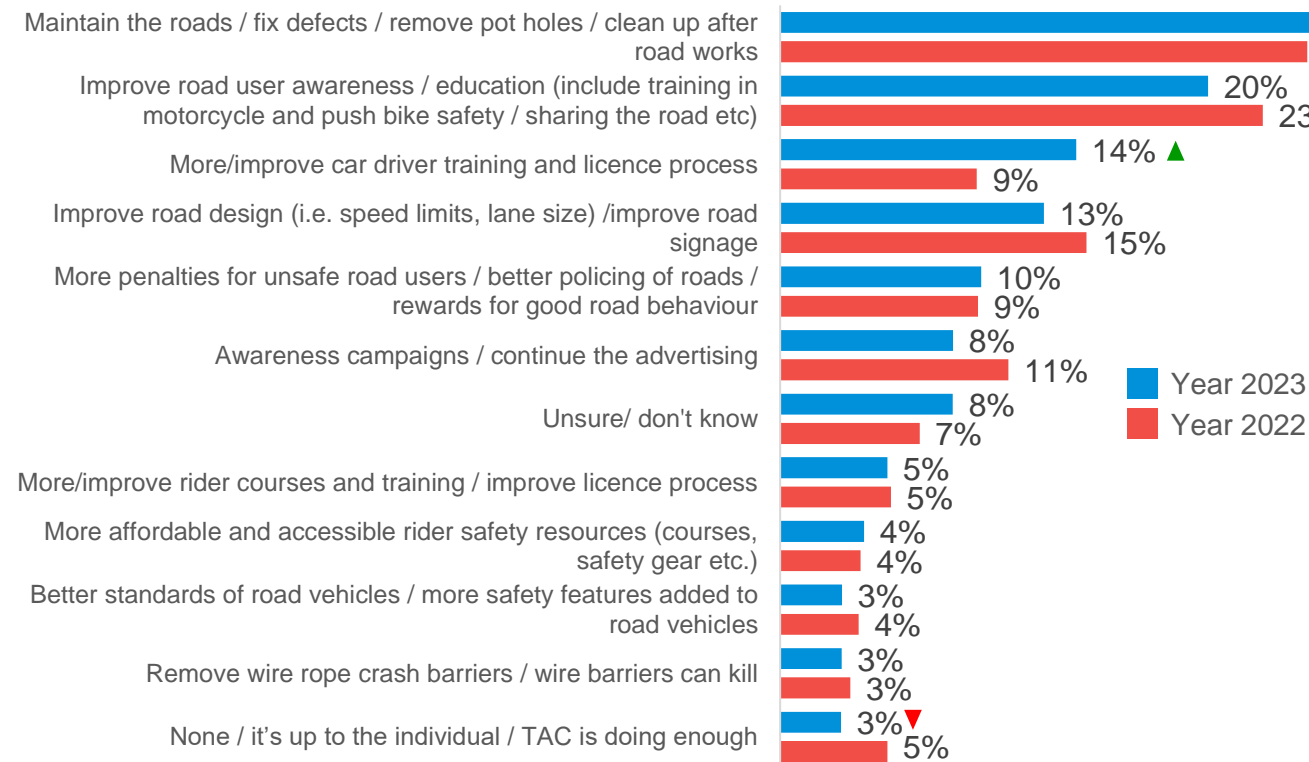
CRA8. Have you ever provided first aid assistance to a rider who had crashed? This could include riders you were riding with or other riders. Base – Ad hoc module: Total sample Year 2022 n=441; Year 2023 n=347.

**Small sample size, interpret with caution.

WHAT SHOULD TAC DO TO IMPROVE ROAD SAFETY?



Lastly, when asked what steps the TAC should take to improve road safety, the most common responses referred to 'road maintenance, fixing defects, removing potholes, and cleaning up after roadworks' (31%, significantly up YoY). This was followed by 'improving road user awareness and education' (20%) and 'improving car driver training and licensing process' (14%, significantly up YoY). These responses align with the strong perception that car drivers are not always cognizant of motorcyclists on the road and lack understanding of the motorcyclist's experience.



"Improve the back roads where most rural riders ride, so many dangerous unexpected potholes."

"[Improve] Driver education. Help drivers to understand the importance of checking blind spots, maintaining their vehicles, lane discipline etc."

"Help to enhance the knowledge of road safety and strengthen the difficulty during driving test"

"I think TAC is probably the best of its kind in the nation. I feel that the roadside advertising is effective at keeping safety messages front of mind, but advertising in traditional media is no longer enough. Social media's are now the only way to reach younger audiences and TAC should advertise more strongly there. Without this there is no way for TAC to deliver road safety education."

"Heavily punish those who continue offending even after convictions so that the message is sent to the general public that serial offenders will "suffer bad consequences"."

Missing cases are excluded in analysis.

D9. What should TAC do to improve road safety in Victoria? Base: Total sample Year 2022 n=924; Year 2023 n=956; Weight: WEIGHT FINAL (EXCL. R&L STATUS).



E-TRANSPORT DEVICES



Please note: Some metrics in this section are based on a small sample size (n= <50). Additional notes highlight where this is applicable have been included in this section. Interpret these results as indicative only.

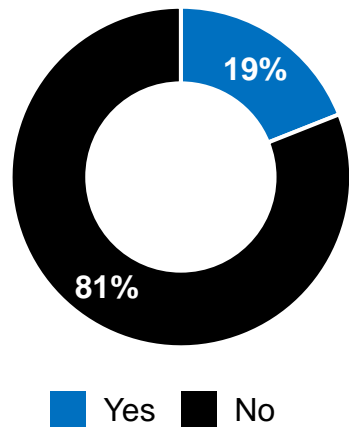
E-TRANSPORT DEVICES- SUMMARY

- In the latter half of 2023, approximately two in five respondents (19%) reported using an e-transport device at least once every six months, with e-bikes (50%) and e-scooters (45%) being the most popular.
- In terms of ownership, e-transport device users tend to own e-bikes (62%), while e-scooters (65%) are more likely to be rented. The primary reasons for using these e-transport devices are recreation, socialisation, and experimentation. No major changes are seen across e-transport devices.
- Most e-transport device users (61%) ride on the road, dedicated bike lanes, or shared paths. E-scooters are more commonly ridden on shared paths and dedicated bike lanes, while e-bike riders show a slight preference for roads and dedicated bike lines. More than half of e-transport device users (56%) prefer areas with a speed limit below 50km/h.
- Nealy 3-in-5 of e-transport device owners (58%) own a device with a speed limit capacity of 25 km or less, aligning with the Victorian regulation that legally allows Victorians to ride scooters with a speed limit of 25km/h or less.
- In terms of safety, users perceive shared paths and dedicated bike lanes as safer options for riding e-transport devices (68% and 64% respectively). Less than half (47%) consider it safe to ride on roads with a speed limit of 50km/h or less, and this perception decreases for roads with a speed limit of 60km/h (28%). E-transport device riders often avoid riding on freeways, highways, or main roads due to safety concerns.

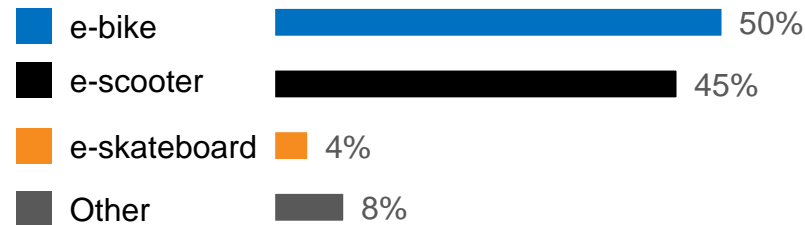
E-TRANSPORT DEVICES

In the second half of 2023, nearly two in five respondents (19%) reported riding an electronic transport device (e-bike, e-scooter, e-skateboard, or similar) at least once every six months. The most commonly used e-transport devices were e-bikes (50%) and e-scooters (45%), with e-skateboards being less popular. E-device riders are more likely to own e-bikes (62%), while e-scooters are more often rented (65%). Preliminary findings suggest that recreation (i.e. trail rides), socialisation (i.e., visiting friends, cafes, bars, or engaging in other social or sport activities), and experimentation are the main reasons for riding e-bikes or e-scooters.

Have ridden an e-bike, e-scooter, e-skateboard or similar



Type of e-transport device ridden



	Owned [^]	Hired/ rented [^]	Borrowed [^]
e-bike	62%	28%	14%
e-scooter	30%	65%	7%

[^]The main reasons for using an e-bike are recreation (59%), socialising and entertaining (45%), and to try it out (30%). E-scooters are used for the same reasons, just to try it out (50%), recreation (39%) and socialising and entertaining (32%).

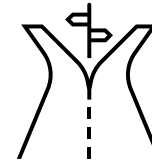
[^]small sample size (n=36), please interpret with caution. Sample size for e-skateboard is below n=30, results are not shown.

M2. The following questions are about how often you do a number of things when driving, riding, or getting about in general. Please provide the answer that best describes how often you do these things. We understand it can be difficult to be exact. ?
 Base: Total sample Q3 & Q4 2023 n=492 | M3_A. You mentioned you ride an e-bike, e-scooter, e-skateboard or similar, which of these devices do you ride? Base: Have ridden an e-transport device Q3 & Q4 2023 n=95. | E1. Thinking about all the times you have ridden an e-bike, e-scooter, e-skateboard or similar in the last 12 months, were these owned, hired or borrowed?; E2. For what reason do you usually use an..... Base: Ad hoc module – have used an e-bike in the last 12 months Q3 & Q4 2023 n=36; have used an e-scooter in the last 12 months Q3 & Q4 2023 n=36 (small sample size, interpret with caution.)
 Weight: WEIGHT FINAL (EXCL. R&L STATUS).

E-TRANSPORT DEVICES – THEIR USAGE LOCATION AND SPEED LIMITS

Almost two in three e-transport device users (61%) ride on the road. Preliminary results indicate that the majority of e-bike and e-scooter riders prefer riding on the road, in dedicated bike lanes, or on shared paths.

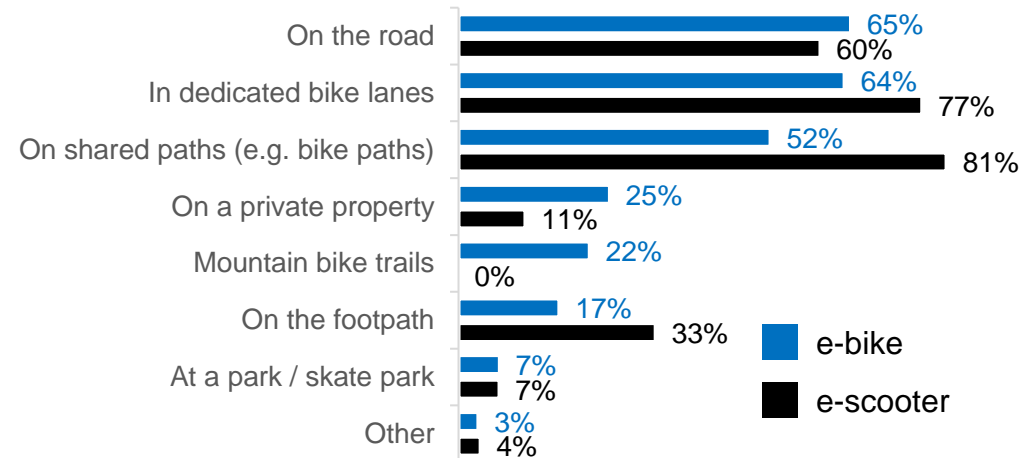
E-scooters are more likely to be ridden on shared paths and dedicated bike lanes, while e-bike riders slightly prefer riding on the road.



61%

Of all e-transport device users* ride on the road

^Where would respondents ride....



^small sample size (n=36), please interpret with caution.

**e-transport device users= those who ride an e-bike, e-scooter, e-skateboard or similar*

E3. Thinking of your typical journeys, which of the following would you ride on when using an.... Base: Ad hoc module: Have ridden an e-transport device Q3 & Q4 2023 n=74; have used an e-bike in the last 12 months Q3 & Q4 2023 n=36; have used an e-scooter in the last 12 months Q3 & Q4 2023 n=36 (small sample size, interpret with caution.) Weight: WEIGHT FINAL (EXCL. R&L STATUS).

E-TRANSPORT DEVICES – THEIR USAGE LOCATION AND SPEED LIMITS

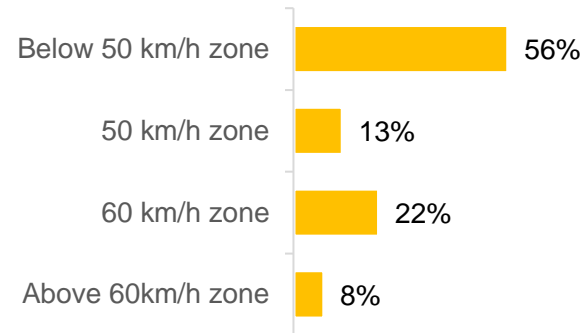


Indicative results suggest that more than half of e-transport device users prefer to ride in areas with a speed limit below 50km/h (56%). Meanwhile, about one in five (22%) typically ride in 60km/h zones, and a small proportion of 'on road' riders use e-transport devices on roads with a speed limit above 60km/h.

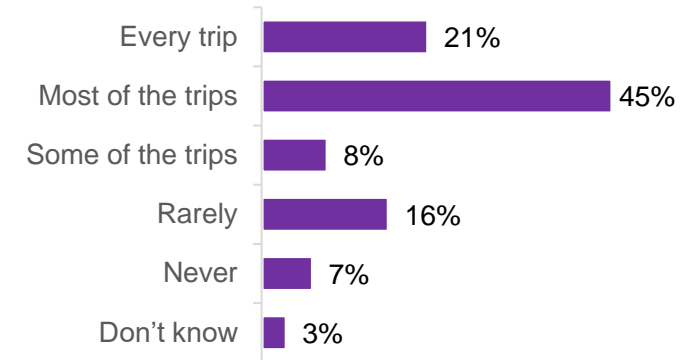
Consequently, the majority of this group (66%) often use roads with a speed limit of 60km/h or less for some or most of their trips. This aligns with the maximum speed capabilities of the e-transport devices used.

Preliminary data show that most e-transport device owners have a device with a maximum speed capability of 25-50km/h. Additionally, nearly three in five (73%) e-transport device owners ride at the device's maximum speed for at least part of their trips.

^Speed limit of roads they typically ride on....



^How often they use only roads up to 60 km/h....



^48% of e-transport device users own their device, nearly 3-in-5 (58%) of them own an e-transport device with a maximum speed capability of 25 km/h or less

Speed capability of e-transport device



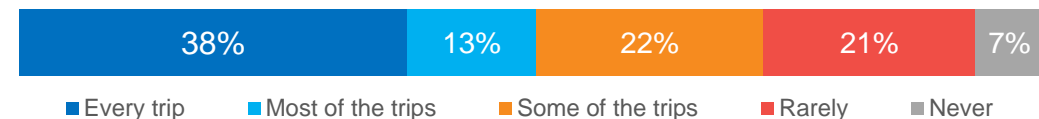
^small sample size, please interpret with caution.

**e-transport device users= those who ride an e-bike, e-scooter, e-skateboard or similar*

E4. You mentioned that you usually ride an e-bike, e-scooter or an e-skateboard on the road. What are the speed limits of the roads you typically ride an e-bike, e-scooter, e-skateboard or similar on?, E5. How often can you get to where you want to go on an e-bike, e-scooter or e-skateboard using only roads up to 60km/h? Base: Ad hoc module: On road riders of e-transport devices Q3 & Q4 2023 n=44 (small sample size, interpret with caution.) | E8. What is the maximum speed capability of your e-bike, e-scooter, e-skateboard or similar on flat ground? Base: Ad hoc module: e-transport device owner Q3 & Q4 2023 n=33 (small sample size, interpret with caution.) | E9. How frequently do you ride at the maximum speed of your e-transport device for at least part of the trip? Base: Ad hoc module: e-transport device owner Q3 & Q4 2023 n=33 (small sample size, interpret with caution.)

Weight: WEIGHT FINAL (EXCL. R&L STATUS).

Frequency of riding at the maximum speed for at least part of the trip

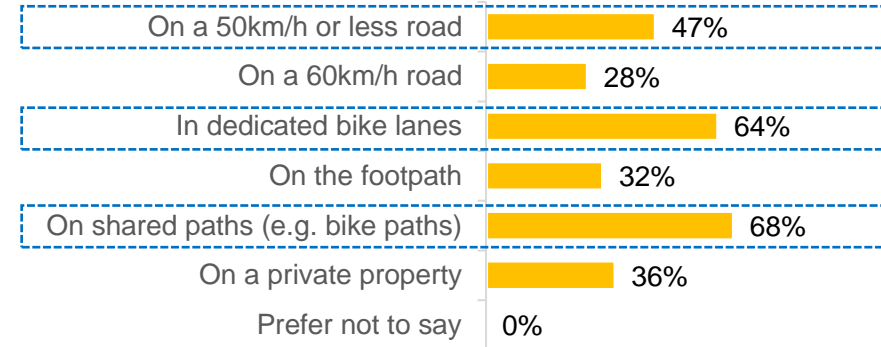


SAFETY PERCEPTIONS AMONG E-TRANSPORT DEVICE RIDERS

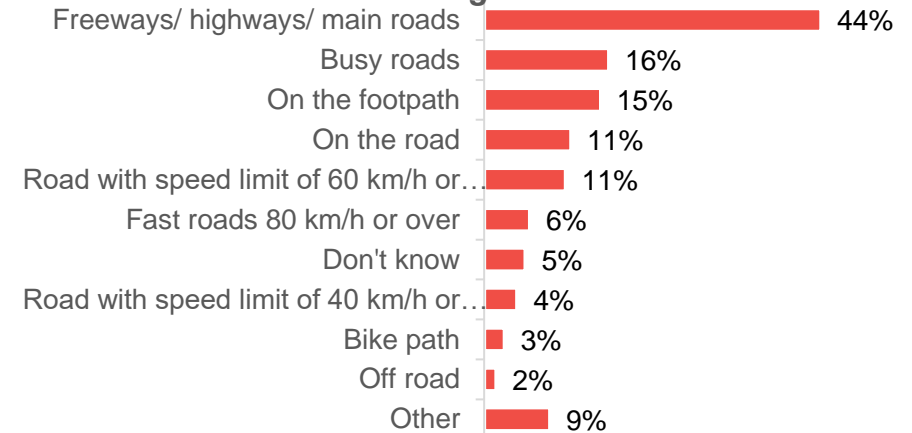
Regarding safety, shared paths and dedicated bike lanes are perceived as safer for riding e-transport devices (68% and 64% respectively). Just under half (47%) of those who have ridden an e-transport device consider it safe to ride on roads with a speed limit of 50km/h or less.

This perception of safety decreases for roads with a speed limit of 60km/h (28%). Finally, e-transport device riders are more likely to avoid riding on freeways, highways, or main roads due to perceived safety concerns.

Situations where e-transport device riders feel safe riding



Situations where e-transport device riders feel unsafe riding



E6. In which of the following situations do you feel safe riding an e-bike, e-scooter, e-skateboard or similar?; E7. Where wouldn't you ride an e-bike, e-scooter, e-skateboard or similar? Open response. Base: Ad hoc module: Have ridden an e-transport device Q3 & Q4 2023 n=74. Weight: WEIGHT FINAL (EXCL. R&L STATUS).

APPENDIX



NUMBER OF MOTORCYCLE CLOTHING ITEMS WORN ALL THE TIME (PAST 3 MONTHS) BY ENGINE CAPACITY AND AGE

Year 2022

Column %	Engine Capacity				Age		
	NET	250cc or less	251-700cc	701cc or larger	18-25	26-39	40+
No items	3%	3%	2%	0% ↓	1%	4%	3%
1	6%	14% ↑	3% ↓	5%	4%	8%	5%
2	10%	17% ↑	9%	7%	16%	9%	9%
3	14%	19%	14%	11%	19%	13%	14%
4	20%	18%	24%	18%	23%	23%	19%
5 or more	47%	29% ↓	48%	60% ↑	37%	43%	50%
Average	4.0	3.3 ↓	4.2	4.4 ↑	3.8	3.9	4.1
Column n	669	121	265	223	114	148	407

Filter: 2022 (Jan-Dec) AND ACTIVE RIDERS; Weight: WEIGHT FINAL (EXCL. R&L STATUS); base n = 669.

Year 2023

Column %	Engine Capacity				Age		
	NET	250cc or less	251-700cc	701cc or larger	18-25	26-39	40+
No items	2%	3%	1%	2%	3%	3%	2%
1	7%	14%	7%	4%	8%	11%	6%
2	10%	14%	10%	8%	12%	12%	10%
3	15%	12%	15%	15%	16%	15%	14%
4	18%	25%	20%	15%	23%	19%	18%
5 or more	47%	32% ↓	48%	56% ↑	37%	39%	51%
Average	4.0	3.5 ↓	4.1	4.3 ↑	3.7	3.7 ↓	4.1 ↑
Column n	679	124	267	231	142	155	382

Filter: 2023 (Jan - Dec) AND ACTIVE RIDERS; Weight: WEIGHT FINAL (EXCL. R&L STATUS); base n = 679.

HOW TO READ THIS REPORT

HOW TO READ THIS REPORT

Statistical test

The data from the Motorcycle Monitor 2022 and 2023 survey has been presented in a combination of charts and tables, typically at the overall level, and also where significant differences were found between groups.

Significant differences are noted when results are significantly different at a 95% confidence interval, this means we can be 95% confident that the difference observed reflects a true difference in the population of interest and is not a result of chance. Where significance testing has been conducted between a group where respondents fell into more than two categories, significance testing has been used that test one category against the average of all the other categories. For example, if it was noted that those aged 18-25 years were significantly more likely to report a certain behaviour, we would be comparing those aged 18-25 years with everyone else (i.e. the average of those aged 18-25 years vs. the average of those aged 26-39 years, 40+ years), not the overall average.

For quarter-on-quarter results, significant testing is performed versus the previous quarter.

Base sizes, notes on rounding

Base sizes may vary due to respondents that completed the survey on paper copy missing a response. Please note that missing cases have been excluded from the analysis.

In some cases, percentages have been rounded to the nearest integer and nets may not add to 100%, instead they may add to 99% or 101% due to rounding. Nets for multiple responses may also add to more than 100% as respondents are allowed to select more than one option.

HOW TO READ THIS REPORT

Definitions of sub-groups

Segment	Definition
Location – Major urban	All urban Centres with a population of 100,000 or more i.e., Melbourne, Geelong, Ballarat
Location – Other urban	All urban Centres with a population of between 1,000 and 99,999 i.e., Warrnambool, Sale, Benalla
Location – Rural balance	Remainder of State/Territory and includes Bounded Localities (centres with population of between 200 and 999 i.e., Taradale, Venus Bay, Fish Creek)
Rider activity – Active riders	Those who have ridden in the last 12 months either on or off road OR had a break from riding and have started riding again
Rider activity – Lapsed riders	Those who have not ridden in the last 12 months, either on or off road AND described themselves as regular or occasional riders OR have not ridden in the last 12 months, either on or off road AND have stopped riding and may decide to ride again in the future.
Rider activity – Former riders	Those who have not ridden in the last 12 months, either on or off road AND have stopped riding and do not intend to ride again
Rider activity – Future riders	Those who have not ridden in the last 12 months, either on or off road AND have never ridden a motorcycle but intend to ride in the future.

HOW TO READ THIS REPORT

Definitions of sub-groups

Segment	Definition
Riding purpose – Commuting	Those who ride for commuting purposes (going to work, study, shops)
Riding purpose – Working purposes	Those who ride for working purposes (excluding commuting to work)
Riding purpose – Recreation on-road	Those who ride for recreation on-road (public roads, highways, freeways)
Riding purpose – Recreation off-road	Those who ride for recreation off-road (tracks in national parks or on private property)
Licence status - Full motorcycle licence	Those who said they have a full motorcycle licence
Licence status - Probationary licence (P – plates)	Those who said they have a probationary (P- plates) motorcycle licence
Licence status – Learner’s permit (L-plates)	Those who said they have a Learner’s permit (L- plates) motorcycle licence
No licence	Those who said they don’t have/ never held a motorcycle/ motor-scooter licence

REPORTED RESULTS PRIOR TO 2022

The following tables include data prior to 2022
reported by Wallis Social Research on behalf of
TAC

REPORTED RESULTS PRIOR TO 2022

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

Column %	2017	2018	2019	2020	2021
NET: Ever	66%	65%	70%	72%	72%
More than once a week	14%	16%	14%	15%	15%
Every one or two weeks	8%	17% ↑	17%	20%	15% ↓
About once a month	8%	7%	9%	8%	10%
Less than once a month	36%	26% ↓	30%	29%	33%
Never	34%	35%	30%	28%	28%
<i>Column n</i>	<i>1020</i>	<i>961</i>	<i>964</i>	<i>1026</i>	<i>932</i>

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

Total sample; Weighted sample; 2017 base n=1019, 2018 base n=961, 2019 base n=964, 2020 base n=1026, 2021 base n=932

↑↓ Indicates statistically significant difference compared to respondents not in that category

REPORTED RESULTS PRIOR TO 2022

R3. Percentage of time spent riding a motorcycle vs driving a car (2012 – 2021)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
51% or more	10%	8%	12%	9%	11%	11%	12%	9%	10%	11%
41-50%	3%	2%	3%	5%	3%	4%	5%	3%	3%	4%
31%-40%	4%	6%	4%	5%	5%	5%	5%	5%	4%	3%
21%-30%	8%	7%	8%	7%	7%	7%	7%	7%	7%	6%
11%-20%	10%	12%	13%	12%	15%	14%	12%	17%	14%	13%
Up to 10%	65%	64%	60%	62%	59%	60%	59%	58%	61%	63%
Column n	440	493	582	596	534	800	758	731	789	677

R3. - Thinking about your time spent riding and driving over the last 12 months, approximately what percentage of the time would you say you rode a motorcycle (on or off-road) as opposed to drove a car?

Filter: Ridden in the last 12 months; Weighted; 2012 base n=440, 2013 base n=493, 2014 base n=582, 2015 base n=596, 2016 base n=534, 2017 base n=800, 2018 base n=758, 2019 base n=731, 2020 base n=789, 2021 base n=677

REPORTED RESULTS PRIOR TO 2022

AT7. To what extent do you agree or disagree with the following statements – Drivers don't understand what it is like to be a motorcyclist?

	2013	2014	2015	2016	2017	2018	2019	2020	2021
NET: Agree	92%	86%	90%	89%	93%	89%	89%	92%	93%
Don't know		1%	1%	1%		1%	1%	1%	1%
NET: Disagree	5%	6%	4%	4%	3%	4%	5%	3%	4%
Neither	3%	6%	5%	7%	4%	6%	5%	4%	3%
Somewhat agree	31%	30%	31%	29%	28%	27%	32%	30%	32%
Strongly agree	61%	56%	59%	60%	65%	62%	57%	62%	61%
Column n	491	572	592	518	791	747	723	785	668

AT7. - To what extent do you agree or disagree with the following statements – Drivers don't understand what it is like to be a motorcyclist?

Base: Those who have ridden in the last 12 months;

Weighted sample; 2013 base n=491; 2014 base n=572; 2015 base n=592; 2016 base n=518; 2017 base n=791; 2018 base n=748; 2019 base n=723, 2020 base n=783, 2021 base n=668

REPORTED RESULTS PRIOR TO 2022

AT9. To what extent do you agree or disagree with the following statements –
Most drivers are unaware of motorcyclists when they are driving?

Column %	2017	2018	2019	2020	2021
NET: Agree	83%	82%	86%	86%	89%
Don't know		2%	1%	1%	1%
Strongly disagree	2%	1%	1%	2%	2%
Somewhat disagree	5%	6%	5%	6%	3%
Neither	9%	9%	7%	6%	5%
Somewhat agree	42%	39%	47%	41%	47%
Strongly agree	42%	43%	39%	45%	41%
Column n	792	748	722	785	668

AT9. - To what extent do you agree or disagree with the following statements - Most drivers are unaware of motorcyclists when they are driving?

Base: Those who have ridden in the last 12 months;

Weighted sample; 2017 base n=792, 2018 base n=749, 2019 base n=723, 2020 base n=785, 2021 base n=668.

REPORTED RESULTS PRIOR TO 2022

LIC1. Do you have a motorcycle licence?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
No Licence	2%	3%	2%	5%	3%	3%	2%	2%	2%	2%
Learner's Permit	1%	4%	4%	3%	4%	4%	2%	2%	3%	3%
Probationary licence	1%	4%	3%	4%	3%	4%	5%	5%	4%	4%
Full licence	96%	89%	91%	89%	90%	89%	91%	91%	91%	91%
<i>Column n</i>	<i>548</i>	<i>703</i>	<i>781</i>	<i>799</i>	<i>763</i>	<i>1025</i>	<i>969</i>	<i>971</i>	<i>1027</i>	<i>924</i>

LIC1. - Do you have a motorcycle licence?

Total 2021 sample; Weighted sample; total n=924

REPORTED RESULTS PRIOR TO 2022

LIC2. How old were you when you got your motorcycle licence?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Under 17	9%	7%	8%	7%	5%	9%	9%	8%	7%	6%
18-25	58%	61%	56%	59%	60%	60%	58%	59%	61%	61%
26-39	24%	22%	22%	22%	22%	22%	22%	21%	20%	22%
40+	8%	8%	9%	9%	14%	9%	11%	12%	12%	10%
Column n	501	555	692	722	652	966	922	913	956	848

LIC2. - How old were you when you got your motorcycle licence?

Filter: Full and probationary licence only/ no longer hold a licence; Weighted sample; 2012 base n=501, 2013 base n=555, 2014 base n=692, 2015 base n=722, 2016 base n=652, 2017 base n=966, 2018 base n=922, 2019 base n=913, 2020 base n=956, 2021 base n=848

REPORTED RESULTS PRIOR TO 2022

LIC3. How old were you when you got your motorcycle learner's permit?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Under 26 years	72%	46%	40%	61%	31%	47%	37%	35%	38%	36%
26-39 years	28%	25%	35%	30%	28%	36%	50%	47%	37%	50%
40 years and over	0%	28%	25%	8%	41%	17%	13%	18%	26%	14%
Column n	22	117	79	83	56	40	29	31	46	49

LIC3. - How old were you when you got your motorcycle learner's permit?

Filter: Learner licence only; Weighted sample; 2012 base n=22, 2013 base n=117, 2014 base n=79, 2015 base n=83, 2016 base n=56, 2017 base n=40, 2018 base: n=29, 2019 base: n=31, 2020 base n=46, 2021 base n=49

REPORTED RESULTS PRIOR TO 2022

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)?

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Active riders	42%	55%	54%	53%	56%	52%	56%	57%	53%
Lapsed riders	48%	40%	37%	39%	34%	37%	34%	34%	38%
Former riders	10%	5%	9%	8%	10%	11%	10%	9%	9%
Column n	690	774	791	762	1024	967	970	1037	933

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)?

All respondents; Weighted, n=933

REPORTED RESULTS PRIOR TO 2022

R1. Have you ridden a motorcycle in the last 12 months (either on or off-road)?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
	71%	57%	62%	66%	60%	62%	61%	66%	66%	62%
Column n	545	694	777	793	761	1024	968	972	1036	933

R1. - Have you ridden a motorcycle in the last 12 months (either on or off-road)?

Filter: excludes never ridden a motorcycle; Total sample; Weighted sample; 2021 base n=933

REPORTED RESULTS PRIOR TO 2022

R4. Which of the following best describes your motorcycle riding history?

	2013	2014	2015	2016	2017	2018	2019	2020	2021
I have never had a break from riding since learning to ride and ride regularly	16%	20%	18%	15%	15%	16%	17%	19%	15%
I have never had a break from riding since learning to ride but only ride occasionally	18%	21%	22%	23%	23%	20%	24%	23%	20%
I had a break from riding and have started riding again	9%	17%	16%	16%	18%	16%	15%	15%	18%
I have stopped riding and may decide to ride again in the future	46%	37%	34%	38%	34%	37%	34%	34%	38%
I have stopped riding and do not intend to ride again	10%	5%	9%	8%	10%	11%	9%	9%	9%
I have never ridden a motorcycle	1%	0%	1%	0%	0%	0%	1%	0%	0%
<i>Column n</i>	692	776	798	762	1024	967	970	1037	933

R4. - Which of the following best describes your motorcycle riding history?

Total sample; Weighted; 2013 base n=692; 2014 base n=776, 2015 base n=798, 2016 base n=762, 2017 base n=1024, 2018 base n=971, 2019 base n=970 2017 base n=1024, 2018 base n=971, 2019 base n=970, 2020 base = 1,037, 2021 base n=933

REPORTED RESULTS PRIOR TO 2022

R5. Approximately, how long was the most recent break?

Column %	2013	2014	2015	2016	2018	2019	2020	2021
Up to 11 months	28%	40%	50%	39%	25%	19%	14%	16%
1-2 years	19%	30%	18%	22%	22%	26%	21%	22%
3-5 years	31%	12%	13%	19%	19%	15%	22%	19%
6 years or more	22%	18%	18%	19%	34%	40%	43%	43%
Column n	72	114	117	126	198	173	184	183

R5. - Approximately, how long was the most recent break?

Filter: Had a break from riding but started riding again

Weighted; 2013 base n=72; 2014 base n=114, 2015 base n=117, 2016 base n=126, 2017 base n=214, 2018 base n=198, 2019 base n=173, 2020 base n=184, 2021 base n=183

REPORTED RESULTS PRIOR TO 2022

R2. Reasons why motorcyclists have not ridden in the last 12 months (2013 – 2021)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
No longer own a motorcycle	69%	65%	61%	66%	66%	65%	64%	71%	70%
Family commitments/change in lifestyle	42%	47%	37%	34%	29%	31%	25%	26%	25%
Too busy/never have time to ride	21%	22%	14%	16%	11%	7%	7%	12%	7%
Prefer to travel using other modes (drive, cycle, public transport etc.)	17%	16%	23%	15%	17%	16%	17%	12%	17%
Too expensive to maintain a motorcycle	6%	7%	8%	11%	8%	5%	6%	7%	5%
Motorcycle related injury	7%	2%	3%	2%	4%	3%	8%	5%	4%
Moved locations, so became too far to ride	4%	4%	4%	1%	1%	1%	4%	1%	3%
Non-motorcycle related injury	2%	4%	7%	4%	3%	3%	6%	3%	4%
Other	7%	6%	5%	4%	11%	12%	15%	9%	13%
Column n	164	163	143	165	187	179	233	237	252

R2. - What are the main reasons why you haven't ridden a motorcycle in the last 12 months? Multiple responses

Filter: Not ridden in last 12 months

Weighted; 2012 base n=89, 2013 base n=164; 2014 base n=163, 2015 base n=143, 2016 base n=165, base n=189, 2018 base n=179, 2019 base n=233, 2020 base n=237, 2021 base n=252

REPORTED RESULTS PRIOR TO 2022

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

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Commuter	44%	55%	54%	53%	53%	52%	56%	53%	56%	60%
Recreational on-road	82%	79%	79%	79%	72%	77%	78%	79%	79%	77%
Recreational off-road	41%	54%	43%	37%	42%	41%	32%	44%	37%	39%
Column n	354	399	495	473	470	746	692	659	726	628

TYPA/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; 2012 base n=354; 2013 base n=399; 2014 base n=495; 2015 base n=473; 2016 base n=470, 2017 base n=746, 2018 base n=692, 2019 base n=659, 2020 base n=726, 2021 base n=628

REPORTED RESULTS PRIOR TO 2022

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)

Column %	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Don't know	21%	17%	27%	24%	25%	18%	20%	24%	21%	19%
1,501 or more kms per month	4%	3%	3%	2%	3%	3%	5%	4%	4%	4%
1,001-1,500 kms per month	3%	3%	3%	5%	3%	5%	2%	3%	4%	3%
501-1,000 kms per month	11%	9%	11%	8%	9%	9%	13%	9%	12%	13%
101-500 kms per month	29%	23%	28%	32%	34%	34%	28%	27%	31%	28%
Up to 100 kms per month	33%	45%	28%	29%	28%	32%	31%	32%	29%	33%
Column n	440	496	583	603	518	786	744	713	656	547

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; 2012 base n=440; 2013 base n=496; 2014 base n=583; 2015 base n=603; 2016 base n=518; 2017 base n=770; 2018 base n=728, 2019 base n=699, 2020 base n=656, 2021 base n=547

REPORTED RESULTS PRIOR TO 2022

RID2A/B/C- Thinking now about how many hours you rode on any motorcycle off-road for any reason over the last 12 months? An approximate number is OK.

Column %	2017	2018	2019	2020	2021
50 hours or more	3%	3%	3%	3%	2%
21-49 hours per month	5%	5%	4%	4%	5%
8-20 hours per month	11%	10%	11%	9%	10%
Up to 8 hours per month	31%	28%	27%	23%	27%
None / unsure	50%	53%	54%	61%	56%
Column n	763	727	598	745	646

RID2A/B/C- Thinking now about how many hours you rode on any motorcycle off-road for any reason over the last 12 months? An approximate number is OK.

Filter: If ridden in the last 12 months

Weighted; 2017 base n=763; 2018 base n=727, 2019 base n=598, 2020 base n=745, 2021 base n=646

REPORTED RESULTS PRIOR TO 2022

AT5. - Agreement/disagreement with statements about fatigue

Column %	2013	2014	2015	2016	2017	2018	2019	2020	2021
NET: Agree	94%	93%	95%	95%	93%	94%	94%	96%	95%
Don't know	2%	1%	-	1%	-	1%	-	-	1%
Strongly agree	85%	80%	85%	79%	80%	84%	79%	83%	84%
Somewhat agree	9%	13%	10%	16%	13%	10%	15%	13%	11%
NET: Neutral / disagree	5%	5%	4%	5%	6%	5%	5%	4%	5%
Column n	490	573	591	520	791	746	721	782	668

AT5. - Agreement/disagreement with statements about fatigue

Weighted; 2013 base n=490; 2014 base n=573; 2015 base n=591; 2016 base n=520; 2017 base n=791; 2018 base n=747; 2019 base n=721; 2020 base n=780; 2021 base n=668 / Neutral and don't know responses not shown)

REPORTED RESULTS PRIOR TO 2022

BEH1. - How often have you intentionally ridden above the speed limit in a 60km/h zone, even if by only a few kms per hour, in the last three months?

Column %	2017	2018	2019	2020	2021
NET: Ever	40%	44%	45%	39%	41%
All of the time	1%	1%	1%	0%	0%
Most of the time (More than half but not all)	4%	3%	5%	3%	5%
About half the time (50%)	7%	6%	6%	5%	6%
Some of the time (Less than half but not never)	29%	34%	33%	30%	30%
None of the time	57%	54%	53%	57%	56%
Don't know	3%	2%	2%	3%	2%
<i>Column n</i>	790	748	722	782	663

BEH1. - How often have you intentionally ridden above the speed limit in a 60km/h zone, even if by only a few kms per hour, in the last three months?

Base: Ridden in the last 12 months - Weighted; 2015 base n=591; 2016 base n=520; 2017 base n=790; 2018 base n=748, 2019 base n=722, 2020 base n=782, 2021 base n=663

REPORTED RESULTS PRIOR TO 2022

BEH2. - Intentionally ridden above the speed limit in a 100km/h zone, even if by only a few km's per hour?

Column %	2017	2018	2019	2020	2021
NET: Ever	48%	48%	51%	42%↓	45%
All of the time	1%	1%	3%	1%	1%
Most of the time (More than half but not all)	7%	4%	6%	5%	9%↑
About half the time (50%)	6%	5%	6%	6%	6%
Some of the time (Less than half but not never)	34%	38%	36%	30%	29%
None of the time	49%	51%	48%	55%↑	53%
Don't know	3%	1%	1%	3%	2%
<i>Column n</i>	<i>789</i>	<i>747</i>	<i>723</i>	<i>782</i>	<i>662</i>

BEH2. - Intentionally ridden above the speed limit in a 100km/h zone, even if by only a few km's per hour?

Base: Ridden in the last 12 months - Weighted; 2017 base n=789; 2018 base n=747, 2019 base n=723, 2020 base n=782, 2021 base n=662

↑↓ Indicates statistically significant difference compared to respondents not in that category

REPORTED RESULTS PRIOR TO 2022

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.

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
NET: Agree	19%	18%	21%	24%	19%	20%	26%	23%	19%	18%
Don't know	1%	1%	1%	1%	2%	1%	1%	2%	1%	2%
Strongly agree	3%	3%	6%	5%	6%	6%	7%	5%	4%	4%
Somewhat agree	16%	15%	15%	19%	13%	14%	18%	18%	15%	14%
Neither	15%	17%	16%	15%	18%	14%	16%	18%	15%	20%
Somewhat disagree	20%	18%	21%	16%	16%	17%	20%	16%	17%	16%
Strongly disagree	45%	47%	41%	44%	45%	48%	37%	40%	48%	44%
Column n	440	489	569	592	521	789	789	723	780	665

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; 2012 base n=440; 2013 base n=489; 2014 base n=569; 2015 base n=592; 2016 base n=521; 2017 base n=789; 2018 base: n=749; 2019 base n=723; 2020 base n=780; 2021 base n=665.

REPORTED RESULTS PRIOR TO 2022

SPE2. - How fast should people be allowed to ride a motorcycle in a 60km/h zone without being booked for speeding?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Don't know	3%	6%	6%	8%	7%	5%	6%	4%	5%	7%
67 km/h or above	4%	6%	9%	8%	9%	8%	13%	10%	6%	7%
64-66 km/h	21%	18%	18%	28%	29%	31%	27%	29%	28%	28%
61-63 km/h	8%	7%	9%	11%	18%	14%	13%	16%	21%	21%
Up to 60 km/h	63%	64%	58%	45%	37%	43%	41%	42%	40%	37%
Column n	358	403	510	488	465	727	672	653	696	600

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; 2012 base n=358; 2013 base n=403; 2014 base n=510; 2015 base n=488; 2016 base n=465; 2017 base n=727, 2018 base n=680, 2019 base n=653, 2020 base n=696, 2021 base n=600

REPORTED RESULTS PRIOR TO 2022

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

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Don't know	2%	5%	4%	8%	5%	6%	5%	3%	4%	5%
111 km/h or above	8%	6%	9%	9%	7%	8%	9%	8%	6%	5%
106-110 km/h	19%	19%	20%	21%	25%	27%	29%	28%	23%	25%
101-105 km/h	16%	14%	19%	22%	29%	24%	24%	24%	33%	32%
Up to 100 km/h	55%	55%	48%	40%	33%	36%	33%	37%	34%	32%
Column n	357	403	506	487	460	726	672	644	695	600

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; 2012 base n=357; 2013 base n=403; 2014 base n=506; 2015 base n=487; 2016 base n=460; 2017 base n=726; 2018 base n=672, 2019 base n=644, 2020 base n=695, 2021 base n=600

REPORTED RESULTS PRIOR TO 2022

POL1. - Have you been pulled over by police for any reason while riding your motorcycle in the last 12 months?

Column %	2017	2018	2019	2020	2021
Yes	16%	17%	14%	17%	13%
No	83%	83%	85%	83%	87%
Don't know / Refused	1%	1%	1%	0%	0%
Column n	727	675	647	697	598

POL1. - Have you been pulled over by police for any reason while riding your motorcycle in the last 12 months?

Filter: Active riders; Weighted; 2012 base n=359; 2013 base n=506; 2014 base n=404; 2015 base n=486; 2016 base n=467; 2017 base n=725, 2018 base n=675, 2019 base n=647, 2020 base n=697, 2021 base n=598

REPORTED RESULTS PRIOR TO 2022

POLB. - In the last 12 months, how many times, if any have you been breath-tested when riding your motorcycle

	2015	2016	2017	2018	2019	2020	2021
NET: Breath tested	20%	19%	19%	24%	24%	19%	15%
Two or more times	10%	7%	8%	6%	8%	8%	5%
Once	10%	12%	11%	17%	12%	12%	10%
Zero	79%	80%	79%	76%	81%	81%	85%
Column n	491	467	729	674	644	695	595

POLB. - In the last 12 months, how many times, if any have you been breath-tested when riding your motorcycle

Filter: Active riders; Weighted; 2021 base n=595

REPORTED RESULTS PRIOR TO 2022

FEA. - Have you heard of any of the following motorcycle safety features?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
ABS (Antilock braking system)	77%	75%	79%	81%	84%	89%	86%	90%	87%	88%
Traction control	58%	53%	53%	57%	58%	66%	62%	66%	70%	74%
Motorcycle Stability Control								42%	54%	53%
Speed limiter function	32%	30%	29%	38%	37%	46%	38%	47%	48%	52%
Motorcycle to vehicle communication									35%	22%
I have heard of none of the above	13%	16%	11%	12%	14%	7%	9%	7%	10%	8%
<i>Column n</i>	359	405	511	491	468	565	672	307	516	597

FEA. - Have you heard of any of the following motorcycle safety features?

Filter: Active riders; Weighted sample; 2012 base n=359; 2013 base n=405; 2014 base n=511; 2015 base n=491; 2016 base n=468; 2017 base n=565; 2018 base n=672; 2019 base n=307; 2020 base n=516; 2021 base n=597

REPORTED RESULTS PRIOR TO 2022

ATB - To what extent do you agree or disagree with the following statement. I think motorcyclists should always wear motorcycle clothing (jacket, pants, boots and gloves) while riding

	2017	2018	2019	2020	2021
NET: Agree	84%	86%	82%	88%	86%
Strongly agree	69%	71%	64%	67%	68%
Somewhat agree	16%	19%	18%	17%	17%
Neither	5%	4%	6%	4%	5%
Somewhat disagree	5%	5%	6%	3%	5%
Strongly disagree	6%	5%	6%	5%	5%
Column n	792	748	721	784	665

ATB - To what extent do you agree or disagree with the following statement. I think motorcyclists should always wear motorcycle clothing (jacket, pants, boots and gloves) while riding

Filter: Ridden in the last 12 months; Weighted sample; Base n=665

REPORTED RESULTS PRIOR TO 2022

MC7 - Have you ever had a crash while riding a motorcycle, not including dropping your bike while stationary and not including a crash that occurred while participating in motorcycle sport?

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
No	46%	54%	53%	59%	54%	56%	58%	58%	60%	58%
Yes	54%	46%	47%	41%	46%	44%	42%	42%	40%	42%
Column n	545	694	778	794	748	1021	960	959	1029	925

MC7 - Have you ever had a crash while riding a motorcycle, not including dropping your bike while stationary and not including a crash that occurred while participating in motorcycle sport?

Filter: Total sample (excluding refused); Weighted sample; 2012 base n=545; 2013 base n=694; 2014 base n=778; 2015 base n=794; 2016 base n=748; 2017 base n=1021; 2018 base n=960, 2019 base n=959, 2020 base n=1,029, 2021 base n=925

REPORTED RESULTS PRIOR TO 2022

D6. - Would you like to make any suggestions to the TAC about what they can do to improve rider safety?

Column %	2017	2018	2019	2020	2021
None / it's up to the individual / riders are responsible for their own actions	27%	23%	21%	23%	27%
Improve road user awareness /education (include training in motorcycle and push bike safety/sharing the road etc)	12%	16%	17%	18%	21%
Awareness campaigns / continue the advertising	3%	4%	6%	9%	5%↓
Maintain the roads / fix defects / remove pot holes / clean up after road works	5%	5%	5%	7%↑	9%
Remove wire rope crash barriers / wire barriers can kill	2%	6%↑	6%	4%↓	2%↓
Make the wearing of protective clothing mandatory	4%	3%	3%	3%	2%
More/improved car driver training	4%	3%	3%	3%	2%
Improve road design / consider road safety in road design	0%	1%	2% ↑	2%	2%
Make the wearing of high visibility vests and jackets mandatory	4%	2%	3%	2%	2%
Comprehensive learner rider courses / more supervised training	3%	3%	3%	2%	4%
Column n	1028	971	972	1037	933

D6. - Would you like to make any suggestions to the TAC about what they can do to improve rider safety?

Total Sample Weighted; Base 2021 n=1,028

↑↓ Indicates statistically significant difference compared to respondents not in that category

REPORTED RESULTS PRIOR TO 2022

D6. - Would you like to make any suggestions to the TAC about what they can do to improve rider safety?

Column %	2017	2018	2019	2020	2021
None / it's up to the individual / riders are responsible for their own actions	27%	23%	21%	23%	27%
Improve road user awareness /education (include training in motorcycle and push bike safety/sharing the road etc)	12%	16%	17%	18%	21%
Awareness campaigns / continue the advertising	3%	4%	6%	9%	5%
Maintain the roads / fix defects / remove pot holes / clean up after road works	5%	5%	5%	7%	9%
Remove wire rope crash barriers / wire barriers can kill	2%	6%	6%	4%	2%
Make the wearing of protective clothing mandatory	4%	3%	3%	3%	2%
More/improved car driver training	4%	3%	3%	3%	2%
Improve road design / consider road safety in road design	0%	1%	2%	2%	2%
Make the wearing of high visibility vests and jackets mandatory	4%	2%	3%	2%	2%
Comprehensive learner rider courses / more supervised training	3%	3%	3%	2%	4%
Column n	1028	971	972	1037	933

D6. - Would you like to make any suggestions to the TAC about what they can do to improve rider safety?

Total Sample Weighted; Base 2021 n=1,028

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TAC MOTORCYCLE MONITOR - 2023

Final report of findings - Draft
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