



Motorcycle Monitor 2020 Report

wallis.
Social Research

Report prepared for:

Jodi Page-Smith
Road Safety Research Analyst
Community Relations
Transport Accident Commission (TAC)
60 Brougham Street
Geelong 3220

Accreditations

Wallis Social Research achieved accreditation to the International Standard ISO20252 in September 2007. The Company is committed to maintaining administrative and operational procedures which comply with these accreditation requirements and to improving its performance in all aspects of the service it delivers to its customers.

In 2020 Wallis sought and attained certification to ISO 27001. This is the highest standard for information and data security. Wallis made the strategic decision to become certified to ISO 27001 because we recognise the absolute necessity for our clients to be assured that their data is secure. Wallis is one of the first research companies in Australia to achieve certification to this standard.

Wallis is an active participant in the market research industry, with senior staff making significant contributions to the Research Society (TRS) and the Australian Data and Insights Association (ADIA). As such we actively pursue the ethical objectives of the industry.

In addition to having attained the highest Industry accreditation, Wallis also participates in the Australian Achiever Awards, which recognises the customer service excellence of Australian companies. The Company has been awarded a high commendation every year since the inception of these awards in 1999.

Wallis is an acknowledged leader in data protection and privacy. Our system is regularly subjected to external penetration testing and we are a Privacy Awareness Week supporter – committed to sharing our knowledge with others. Wallis is also active member of the Australian Cyber Security Centre (ACSC) Partnership Program.



Executive summary

The 2020 Motorcycle Monitor report presents the findings collected in Motorcycle Monitor surveys over the course of 2020. These surveys cover a wide range of topics including travelling habits, learning to ride, riding activity, attitudes to speeding, impaired riding, motorcycle ownership, protective clothing and crash history.

Riding activity

Two-thirds (66%) of respondents have ridden a motorcycle at least once in the last 12 months, the same percentage as recorded in 2019 (66%).

Six-in-ten respondents (57%) are 'active riders', who ride 'regularly' or 'occasionally' or have 'returned to riding from a break', while a third (34%) are 'lapsed riders' who have not ridden, but may do so in the future. The remainder (9%) are 'former riders' who have no intention of riding again. Considering frequency of riding, about one in seven (15%) ride more than once a week while one in five (20%) ride every one or two weeks.

Training and skills

The majority of motorcyclists who have ridden in the last 12 months stay up-to-date with their skills, with seven-in-ten (69%) ever 'brushing up on their skills'. Riders aged 18-25 years are more likely than older riders to do this 'at least once a month' (48% vs 26%). The top three resources used to brush up on skills are 'friends or family' (48%), YouTube (37%) and 'a motorcycling website' (35%). Just over half (55%) of motorcyclists who have ridden in the last 12 months agree that they would like more information on 'how to stay safe while riding on the road'.

On balance, active riders agree that motorcyclists returning to riding should complete rider training courses on their return (53% agree vs 31% disagree).

Perceived risk and risky behaviour

Riding with an illegal blood alcohol content level is and riding while very drowsy are considered the most dangerous riding behaviours (98% and 94% respectively rate this behaviour between 7-10 on a 0-10 point scale where 10 is extremely dangerous). A smaller percentage (81%), think taking your eyes off the road for two seconds while riding is dangerous.

The understanding of the issue of fatigued riding is underscored with 96% of motorcyclists who have ridden in the last 12 months agreeing that *'the only*

remedy for fatigue while riding is to stop riding and rest'.

While a small percentage of Active Riders who drink alcohol has ridden while over their legal BAC in the last 12 months (2%) a substantially higher percentage have ridden after drinking, but when they thought they were under their legal BAC (24%).

Compared to riding over the legal BAC and riding fatigued, only about half of motorcyclists believe it is dangerous to ride a few kms an hour over the limit in both 60 km/h and 100 km/h speed zones (51% and 49% respectively). Although these percentages have increased from 43% in 2019.

About four-in-ten motorcyclists who have ridden in the last 12 months report exceeding the speed limit in a 60 km/h zone (39%) and likewise in a 100 km/h zone (42%). About one-in-five (19%) agree that *'I ride over the speed limit if I'm sure I'll get away with it'*.

While the majority of motorcyclists agree that they *'never take unnecessary risks while riding'* a small subset disagrees (12%).

Protective clothing

Nearly all Active Riders wear a helmet 'all the time' (97%), with 71% always wearing a full-face helmet, 10% wearing an open-face helmet and the remainder (19%) alternating between the two types. Other protective gear is worn by the majority 'all the time', but to a lesser extent (riding gloves 83%; boots 76%; riding jacket 73%). On average, Active Riders wear 3.8 items of protective clothing 'all the time'.

Nearly nine-in-ten (88%) of riders agree that *'I think motorcyclists should always wear motorcycle clothing'*, an increase from 2019 (82%).

Enforcement

One in five (19%) Active Riders had been breath tested when riding their motorcycle in the past 12 months in 2020, a slightly lower result than in 2019 (24%). A smaller percentage had been randomly drug tested in the last 12 months (4% vs 5% in 2019).

When asked about point-to-point speed cameras, Active Riders had a slight tendency to disapprove, with 30% approving, 30% not caring either way and 39% disapproving.

Table of Contents

2	Introduction.....	1
2.1	Background	1
2.2	Objectives.....	2
2.3	Reading this report.....	3
3	Detailed findings.....	6
3.1	How people get around	6
3.2	Learning to ride and riding skills.....	12
3.3	Riding Activity	23
3.4	Perception of danger associated with riding behaviours.....	42
3.5	Speed limit related behaviours and attitudes	43
3.6	Impaired riding.....	47
3.7	Enforcement	49
3.8	Motorcycle/Scooter Ownership	53
3.9	Motorcycle Clothing.....	58
3.10	Motorcycle Crash History	61
3.11	Improving Rider Safety	63
4	Summary of findings.....	65
5	Methodology	68
Appendix 1	Question list for 2020 MM	
Appendix 2	Reminder letter	
Appendix 3	Example questionnaire (hard copy and Primary Approach Letter)	

List of Figures

Figure 1	Definitions of subgroups.....	3
Figure 2	Percentage of time spent riding a motorcycle vs driving a car (2012 – 2019)	8
Figure 3	Time spent riding a motorcycle vs driving a car by selected sub-groups.....	9
Figure 4	Agreement ‘Drivers don’t understand...’ (2014 – 2020)	10
Figure 5	Agreement ‘Most drivers are unaware of motorcyclists...’ (2017 – 2020)	11
Figure 6	Type of motorcycle licence held (2012 – 2020).....	12
Figure 7	Motorcycle licence type by age	13
Figure 8	Age that full or probationary licence was obtained (2012 – 2020).....	15
Figure 9	Age that learners permit was received (2012 – 2020)	16
Figure 10	Frequency of brushing up on skills	18
Figure 11	Reasons for attending motorcycle training	20
Figure 12	When last motorcycle training course was attended	21
Figure 13	Attitude to training when returning to riding after a break (2013 – 2020).....	22
Figure 14	Riding activity segments (2013 – 2020)	23
Figure 15	Riding activity segments by selected rider characteristics.....	24
Figure 16	Riding activity in the last 12 months (2013– 2020).....	25
Figure 17	Riding activity in the last 12 months by age and licence type.....	25
Figure 18	Riding activity in the last 12 months by motorcycle ownership	26
Figure 19	Types of breaks from riding (2013 – 2020).....	27
Figure 20	Duration of most recent break from riding (2013 - 2020).....	28
Figure 21	Likelihood of lapsed riders riding again	28
Figure 22	Reasons why motorcyclists have not ridden in the last 12 months	30
Figure 23	Active Riders by riding purpose (2012 – 2019)	31
Figure 24	Combinations of riding purposes among Active Riders	32
Figure 25	Shares of riding purposes for Active Riders	34
Figure 26	km/month ridden in last 12 months for any purpose (2012 – 2020)	36
Figure 27	km/month ridden in last 12 months by motorcycle characteristic	37
Figure 28	km/month ridden in last 12 months by riding purpose	38
Figure 29	Hours/month spent riding off-road (2017 – 2020).....	38
Figure 30	Level of agreement with ‘the only remedy for fatigue’ statement (2013 – 2020)	39
Figure 31	Rating of danger for three behaviours	40
Figure 32	Perception of danger associated with riding behaviours	42
Figure 33	Perception of danger associated with riding a few km/h over the speed limit.....	44
Figure 34	Level of agreement with ‘I ride over the speed limit...’ statement (2012 – 2020)	45
Figure 35	Perception of danger associated with riding under the influence	48
Figure 36	Speed that should be allowed in a 60km/h zone (2012 – 2020).....	49
Figure 37	Speed that should be allowed in a 100 km/h zone (2012 – 2020).....	50
Figure 38	Percentage of Active Riders who are breath tested (2015 – 2019)	52
Figure 39	Number of motorcycles kept at home – 2020.....	53
Figure 40	Awareness of motorcycle safety features (2012 – 2020).....	56
Figure 41	Usage of protective motorcycle clothing	58
Figure 42	Agreement that motorcyclists should always wear protective clothing	60
Figure 43	Motorcycle crash history (2012 – 2020)	61
Figure 44	Information on how to stay safe riding on the road.....	63

List of Tables

Table 1	Ways of getting around apart from driving or riding.....	6
Table 2	Frequency of driving or riding.....	7
Table 3	Frequency of riding a motorcycle (2017 – 2019).....	7
Table 4	Frequency of driving or riding a motorcycle by demographic.....	8
Table 5	Age when started to ride a motorcycle.....	14
Table 6	Self-perception of riding ability.....	17
Table 7	Resources used to brush up on skills.....	19
Table 8	Likelihood of lapsed riders riding again by demographic.....	29
Table 9	Riding purpose by demographic.....	33
Table 10	Shares of Active Rider riding purposes by demographic.....	34
Table 11	Shares of Active Rider riding purposes by motorcycle characteristic.....	35
Table 12	Recreational group riding.....	35
Table 13	Level of caution when riding in a group.....	36
Table 14	Talked on a mobile phone using headphones while riding.....	41
Table 15	Taking unnecessary risks while riding.....	41
Table 16	Frequency of intentionally riding above the limit in a 60km/h zone (2017 – 2020).....	43
Table 17	Frequency of intentionally riding above the limit in a 100km/h zone (2017 – 2020).....	43
Table 18	Agreement with ‘I ride over the speed limit...’ statement by demographic.....	46
Table 19	Agreement with ‘I ride over the speed limit...’ statement by engine capacity.....	46
Table 20	Percentage of Active Riders who drink alcohol and ride after drinking.....	47
Table 21	Speed that should be allowed in a 60km/h by demographic.....	50
Table 22	Speed that should be allowed in a 100km/h zone by demographic.....	51
Table 23	Approval of point-to-point speed cameras.....	51
Table 24	Whether pulled over by police in last 12 months.....	52
Table 25	Number of motorcycles kept at home by rider activity segment.....	53
Table 26	Main motorcycle type by selected rider characteristics.....	54
Table 27	Engine size of main motorcycle by selected rider characteristics.....	55
Table 28	Engine size of main motorcycle by rider purpose.....	55
Table 29	Awareness, desire for and possession of motorcycle safety features.....	57
Table 30	Number of items worn all the time when riding.....	59
Table 31	Number of items worn all the time or most of the time when riding.....	59
Table 32	Type of helmet used.....	60
Table 33	Most recent crash requiring medical treatment (2012 – 2020).....	61
Table 34	Receiving assistance after crashing.....	62
Table 35	Importance of assistance for recovery.....	62
Table 36	Suggestions to improve rider safety (2017 – 2020).....	64
Table 37	Key Fieldwork Figures.....	68
Table 38	Sample attributes and population comparisons.....	69

2 Introduction

This section provides background to the report, including the research objectives.

2.1 Background

The Transport Accident Commission (TAC) is a government-owned organisation which was established in Victoria in 1986 through the Transport Accident Act (1986). Funding for the TAC is derived from vehicle registration fees collected by VicRoads. The TAC has three main roles, each of which is geared towards reducing the impact of adverse health effects caused by traffic accidents:



To promote road safety



To improve the State's trauma system



To support those who have been injured on Victorian roads

Conducted annually on behalf of the Transport Accident Commission (TAC) since 2012, the focus of the Motorcycle Monitor (MM) is largely on the first role – promoting road safety. The findings are used to help understand Victorian motorcyclists' experiences on the roads and their behaviours and attitudes relating to this issue. The purpose is to gain a representative view of the motorcycle rider population.

Motorcyclist fatalities comprise a substantial minority of lives lost on Victorian roads. In 2020, 32 motorcyclists lost their lives (15% of all 211 fatalities). This proportion is similar to 2019 where 44 of 266 fatalities (17%) were motorcyclists. Motorcyclists are overrepresented in road fatalities, as only 5% of road users reporting that they ever ride a motorcycle¹.

The importance of motorcyclist road safety is illustrated by examining motorcyclists' road deaths in Victoria over time, with the rate of reduction in deaths experienced among those driving cars has not been matched by the reduction in deaths among those riding motorcycles. While there has been a reduction in the number of motorcyclist road deaths in Victoria from over 60 per year in the late 1980s to 32 in 2020, the percentage of Victorian road deaths occurring among those riding motorcycles versus other types of vehicle has remained higher than about 9% in the late 1980s. For instance, in 2019, 17% of road deaths were motorcyclists and in 2020, 15% of road deaths were motorcyclists.

The methodology used for the Motorcycle Monitor is described in Section 5 of this report.

¹ Road Safety Monitor 2020

2.2 Objectives

The objectives of the Motorcycle Monitor are to explore the characteristics of the Victorian motorcycle rider population in terms of their:

- ▶ **Riding behaviours, including types of riding, frequency and distances ridden**
- ▶ **Attitudes towards and behaviours regarding speeding on motorcycles**
- ▶ **Attitudes towards and behaviours regarding drinking and riding and police enforcement**
- ▶ **Motorcycle ownership**
- ▶ **Use of and attitudes towards protective motorcycle clothing**
- ▶ **Awareness and use of motorcycle safety features**
- ▶ **Crash history**
- ▶ **Demographic characteristics.**

The 2020 questionnaire mirrors the objectives and includes sections relating to: how people get around, learning to ride, riding activity, belief and attitudes to speed and safety, random breath and drug testing, motorcycle and scooter ownership, protective motorcycle clothing, motorcycle crash history and improving rider safety. The questionnaire is provided in Appendix 3.

In addition to exploring the characteristics of the Victorian motorcycle rider population in 2020, where appropriate, this report also describes changes in rider attitudes and characteristics compared to previous years.

2.3 Reading this report

Statistical tests in the report

The data in this report have been tested for statistical significance, typically between subgroups. Tests are conducted between the subgroup and the total excluding the subgroup and are at the 95% confidence interval unless stated otherwise. A multiple comparison correction has been used to adjust the statistical significance where several comparisons are made in the one table.

Tests for sub-groups are ‘group vs all others’ (e.g. 18-25 years vs all other ages). Tests for time series are conducted against the previous period only (e.g. 2020 vs 2019).

Notes on rounding, question response types and base sizes

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




Where questions allow multiple responses from respondents, the base size may add to more than 100% as the total number of responses exceeds the base size. In these cases, the total percentage reflects the average number of responses per respondent, i.e. a multiple response question which adds to a total of 243% has an average of 2.43 responses per respondent.

Subgroup reporting




Victorians who have a motorcycle licence and/or motorcycle registered in their name are eligible to participate in this research. Where results are based on this group, they are referred to as total respondents. In addition, throughout this report reference is made to a variety of subgroups. Table 1 describes how the subgroup definitions have been determined.

Figure 1 Definitions of subgroups



Locations

<p>Major Urban </p>	<p>Major Urban represents a combination of all Urban Centres with a population of 100,000 or more (for example, Melbourne, Geelong, Ballarat).</p>
<p>Other Urban </p>	<p>Other Urban represents a combination of all Urban Centres with a population between 1,000 and 99,999 (for example, Warrnambool, Sale, Benalla).</p>
<p>Rural Balance </p>	<p>Rural Balance represents the Remainder of State/Territory and includes Bounded Localities (centres with population of between 200 and 999 (for example, Taradale, Venus Bay, Fish Creek) and smaller centres.</p>

Rider activity segments




<p>Active Riders</p> 	<p>Those who have ridden in the last 12 months and/or have started riding again after a break.</p>
<p>Lapsed Riders</p> 	<p>Those who have stopped riding but may decide to ride again in the future, or have not ridden in the last 12 months but still consider themselves to be regular riders.</p>
<p>Former Riders</p> 	<p>Those who have stopped riding and do not intend to ride again.</p>

Immediate riding history




<p>Ridden in the last 12 months</p> 	<p>Those who have ridden a motorcycle in the last 12 months (either on or off-road).</p>
<p>Not ridden in the last 12 months but may do so in the future</p> 	<p>Those who have stopped riding and may decide to ride in the future.</p>

Rider purpose

If a respondent has ridden for any of the purposes below, they are then placed in that category (respondents can be allocated to more than one category).

<p>Commuting</p> 	<p>Those who ride for commuting purposes (going to work, study, shops) are <i>Commuters</i>.</p>
<p>Recreating On-road</p> 	<p>Those who ride recreationally on-road (public roads, highways, freeways) are referred to as <i>Recreational On-road Riders</i>.</p>
<p>Recreation Off-road</p> 	<p>Those who ride recreationally off-road (tracks in national parks or on private property) are referred to as <i>Recreational Off-road Riders</i>.</p>

Licence status

<p>Full Licence Holders</p> 	<p>Those who have a full licence.</p>
<p>Probationary Licence Holders</p> 	<p>Those who have a probationary licence.</p>
<p>Learner Permit Holders</p> 	<p>Those who have a learner permit.</p>

3 Detailed findings

3.1 How people get around

Respondents were asked how frequently they get around by public transport, taxis, walking and travelling by car or motorcycle as a passenger. They were also asked how often they use the following types of vehicles on the road: motorcycles, cars, heavy vehicles, and bicycles.

3.1.1 Ways of getting around apart from driving or riding

As shown in Table 1, apart from driving or riding themselves, total respondents are most likely to get around more than once a week by walking (41%) or as passengers on a motorcycle or in a car (32%). Respondents are less likely to get around more than once a week on public transport (9%) or by taking a taxi or similar (1%).

Table 1 Ways of getting around apart from driving or riding

Column %	Taking public transport	Taking a taxi or similar (e.g. Uber)	Go somewhere by walking	Travelling in a car or on a motorbike as a passenger
NET: Ever	73 ↓	66 ↓	88 ↑	91 ↑
More than once a week	9 ↓	1 ↓	41 ↑	32 ↑
Every one or two weeks	7 ↓	7 ↓	24 ↑	30 ↑
About once a month	6 ↓	9	7	11 ↑
Less than once a month	50 ↑	50 ↑	17 ↓	18 ↓
Never	27 ↑	34 ↑	12 ↓	9 ↓
Column n	1021	1017	1016	1024

M1. - Thinking about ways you get around, apart from driving or riding yourself, how often do you go somewhere by...?
 Total sample; Weighted sample; total n= 1016-1024. Figures may not add to 100% due to rounding.
 ↓↑ Indicates statistically significant difference compared to respondents not in that category

3.1.2 Frequency of driving or riding by type of vehicle

As shown in Table 2, among total respondents, a large majority (92%) drive a car more than once a week, which is significantly greater than those riding a motorcycle on the road more than once a week (15%), riding a bicycle on the road more than once a week (13%) or driving a heavy vehicle on the road more than once a week (8%).

Table 2 Frequency of driving or riding

Column %	Motorcycle	Car	Heavy vehicle	Bicycle (on the road)
NET: Ever	72 ↑	100 ↑	31 ↓	59 ↓
More than once a week	15 ↓	92 ↑	8 ↓	13 ↓
Every one or two weeks	20 ↑	6 ↓	4 ↓	14 ↑
About once a month	8 ↑	1 ↓	3 ↓	7 ↑
Less than once a month	29 ↑	1 ↓	16	26 ↑
Never	28 ↓	0 ↓	69 ↑	41 ↑
Column n	1026	1036	1010	1021

M2. - How often, if ever, do you drive or ride the following on the road...
 Total sample; Weighted sample; total n=1010-1036. Figures may not add to 100% due to rounding
 ↓↑ Indicates statistically significant difference compared to respondents not in that category

As shown in Table 3, among total respondents, seven in ten (72%) ride a motorcycle on the road, and one in seven (15%) do so more than once a week. Compared to 2019, there is no significant change in the frequency of riding a motorcycle on the road.

Table 3 Frequency of riding a motorcycle (2017 – 2020)

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

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
 Figures may not add to 100% due to rounding
 ↓↑ Indicates statistically significant difference compared to respondents not in that category

As shown in Table 4, among total respondents, those aged 18-25 (86%) are more likely to ride a motorcycle than those aged 40+ (70%).

Table 4 Frequency of driving or riding a motorcycle by demographic

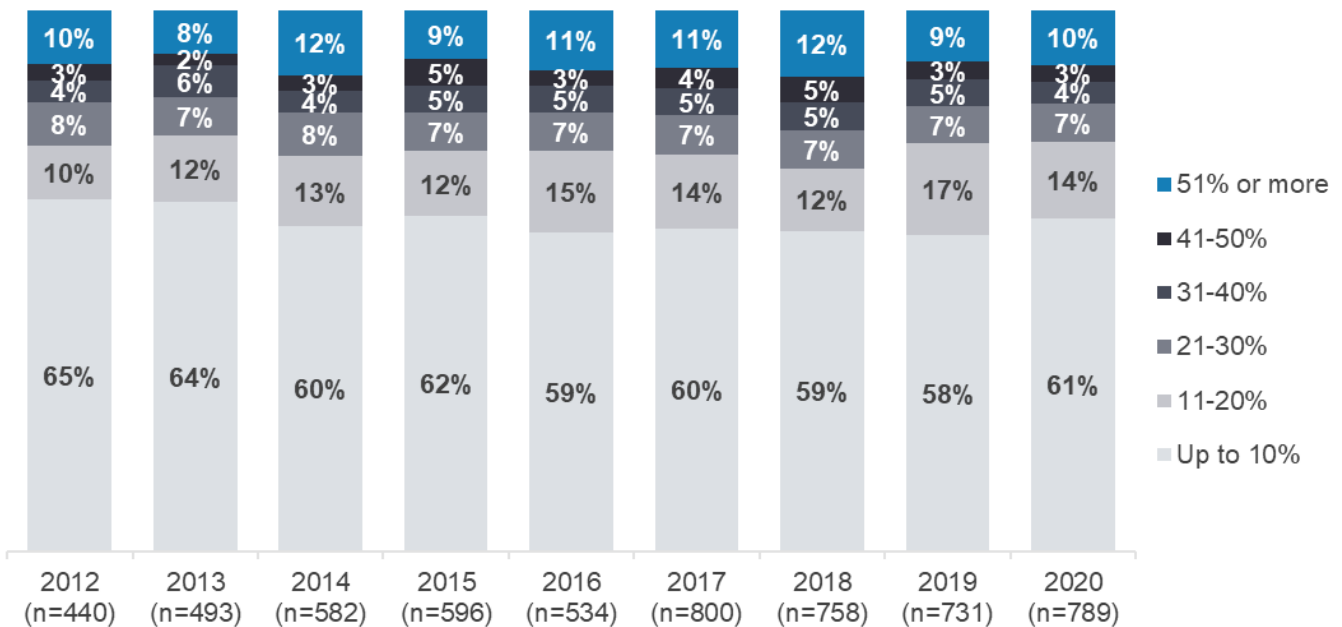
Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Ever	72	72	72	86 ↑	76	70 ↓	72	71	73
More than once a week	15	15	16	36 ↑	13	14	17	12	14
Every one or two weeks	20	20	20	24	24	18	20	19	22
About once a month	8	8	11	6	7	9	7	10	11
Less than once a month	29	30	25	21	33	28	29	30	27
Never	28	28	28	14 ↓	24	30 ↑	28	29	27
Average day per year	41.3	41.8	39.5	91.9 ↑	35.0	40.2	44.8	34.2	42.7
Column n	1026	836	190	172	256	598	571	299	156

M2. - How often, if ever, do you drive or ride the following on the road...
 Total sample; Weighted sample; total n=1026. Figures may not add to 100% due to rounding
 ↓↑ Indicates statistically significant difference compared to respondents not in that category

As shown in Figure 2, respondents who had ridden in the last 12 months were asked what percentage of the time they ride a motorcycle as opposed to drive a car. One in ten (10%) ride their motorcycle more than they drive a car.

Three in four respondents (75%) indicated they ride their motorcycle 20% or less of the time instead of driving a car. These findings remain mostly unchanged between 2012 and 2020.

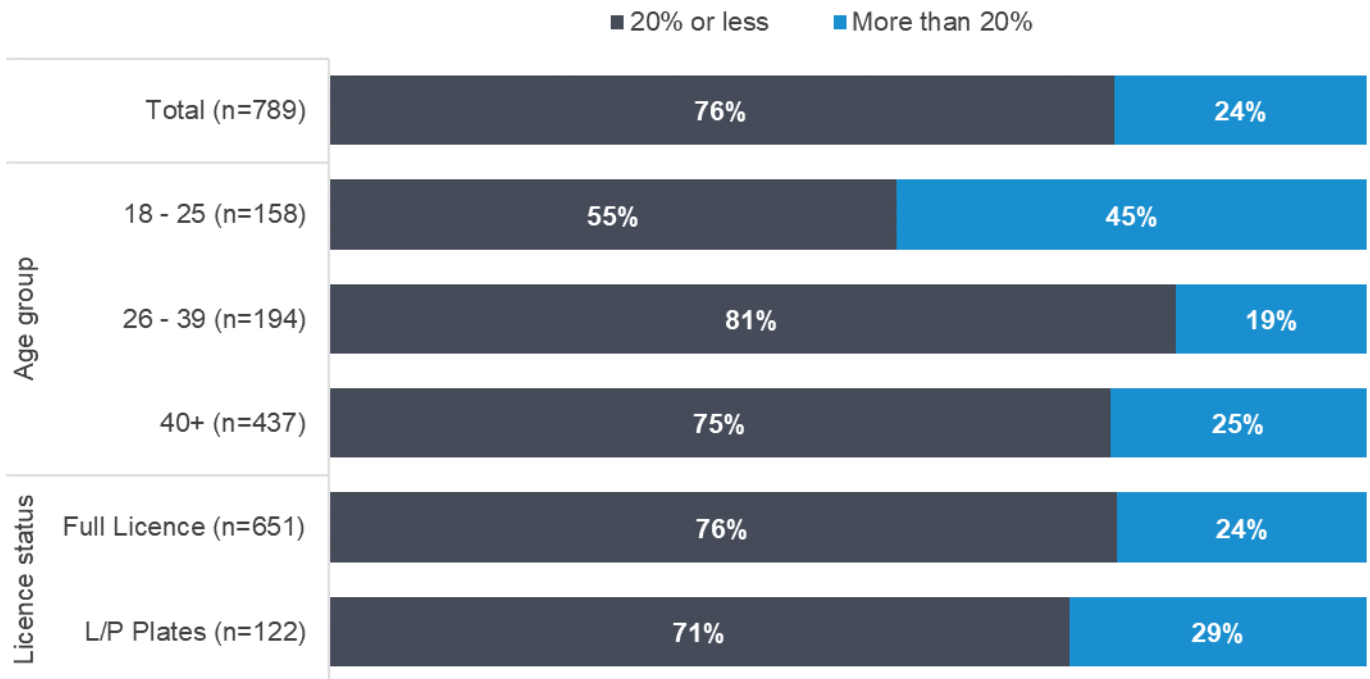
Figure 2 Percentage of time spent riding a motorcycle vs driving a car (2012 – 2020)



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
 Figures may not add to 100% due to rounding

As shown in Figure 3, respondents who have ridden in the last 12 months and are aged 18-25 (45%) ride their motorcycle more than 20% of the time. This percentage is substantially higher than for respondents aged 26-39 (19%) and respondents aged 40 and over (25%).

Figure 3 Time spent riding a motorcycle vs driving a car by selected sub-groups



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; Base n=789
 Figures may not add to 100% due to rounding

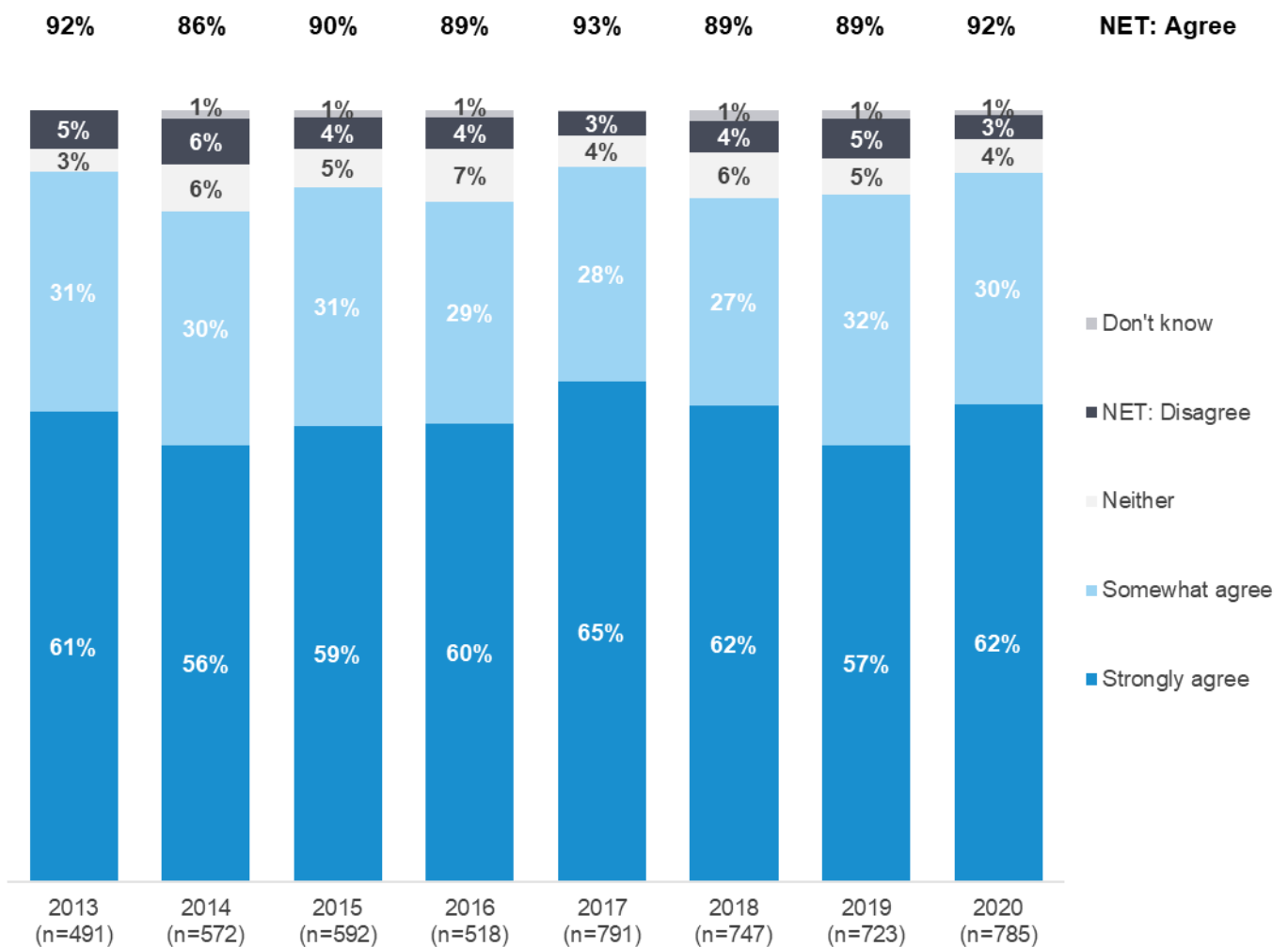
3.1.3 Drivers' perception of motorcyclists

Motorcyclists who have ridden in the last 12 months were asked about how they think drivers perceive motorcyclists.

Perception of driver understanding of motorcyclists' experience

As shown in Figure 4, the large majority of respondents who have ridden in the last 12 months agree that 'drivers don't understand what it is like to be a motorcyclist' (62% strongly agree and 30% somewhat agree with the statement).

Figure 4 Agreement 'Drivers don't understand...' (2013 – 2020)



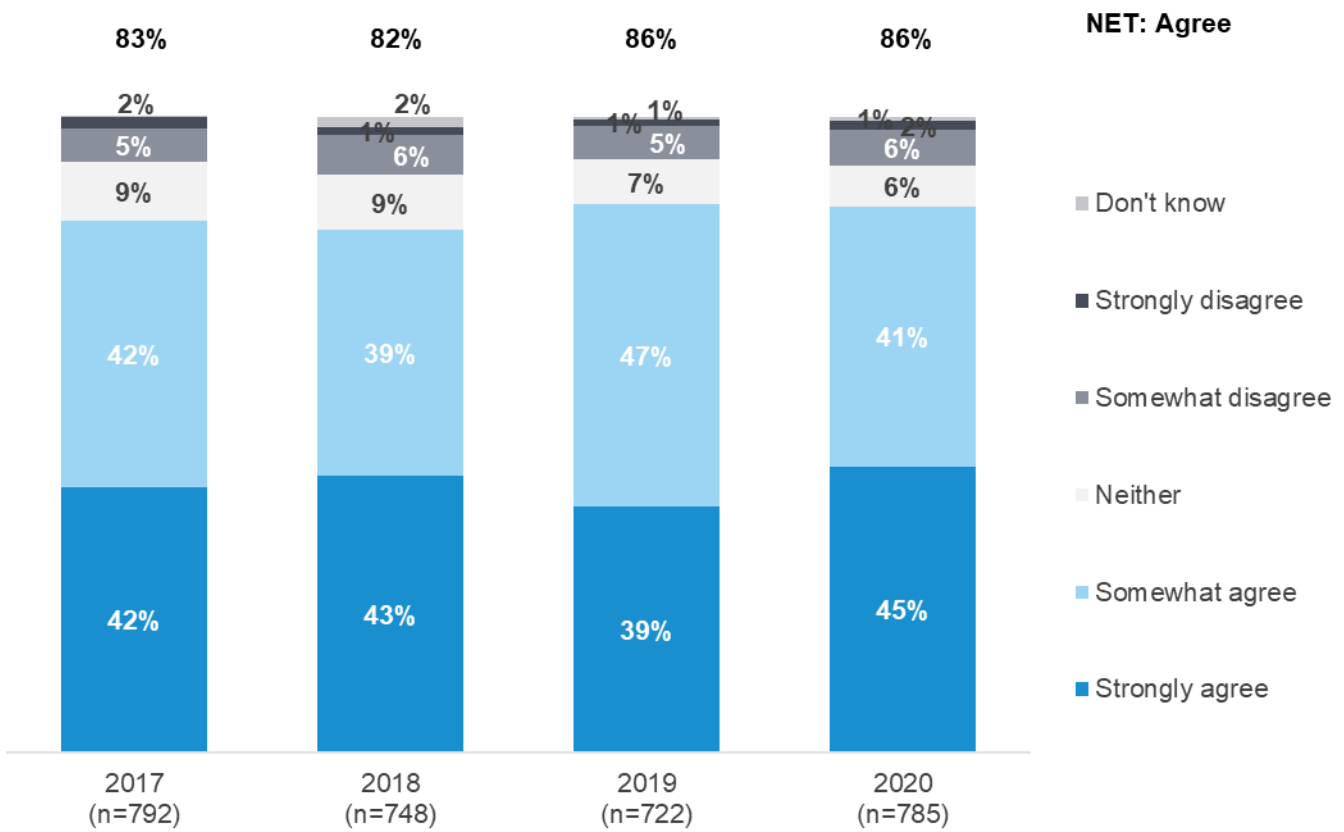
AT7. - To what extent do you agree or disagree with the following statements – Drivers don't understand what it is like to be a motorcyclist?
 Base: Those who have ridden in the last 12 months;
 Weighted sample; 2013 base n=491; 2014 base n=572; 2015 base n=592; 2016 base n=518; 2017 base n=791; 2018 base n=748; 2019 base n=723, 2020 base n=783
 Figures may not add to 100% due to rounding

Perception of driver awareness of motorcyclists

As shown in Figure 5, when asked whether they thought ‘most drivers are unaware of motorcyclists when they are driving’, over four-fifths of respondents who have ridden in the last 12 months (86%) agree, with 45% agreeing strongly and 41% somewhat agreeing. This result as a whole is largely unchanged since 2017.

There are no significant differences by age or gender.

Figure 5 Agreement ‘Most drivers are unaware of motorcyclists...’ (2017 – 2020)



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
 Figures may not add to 100% due to rounding

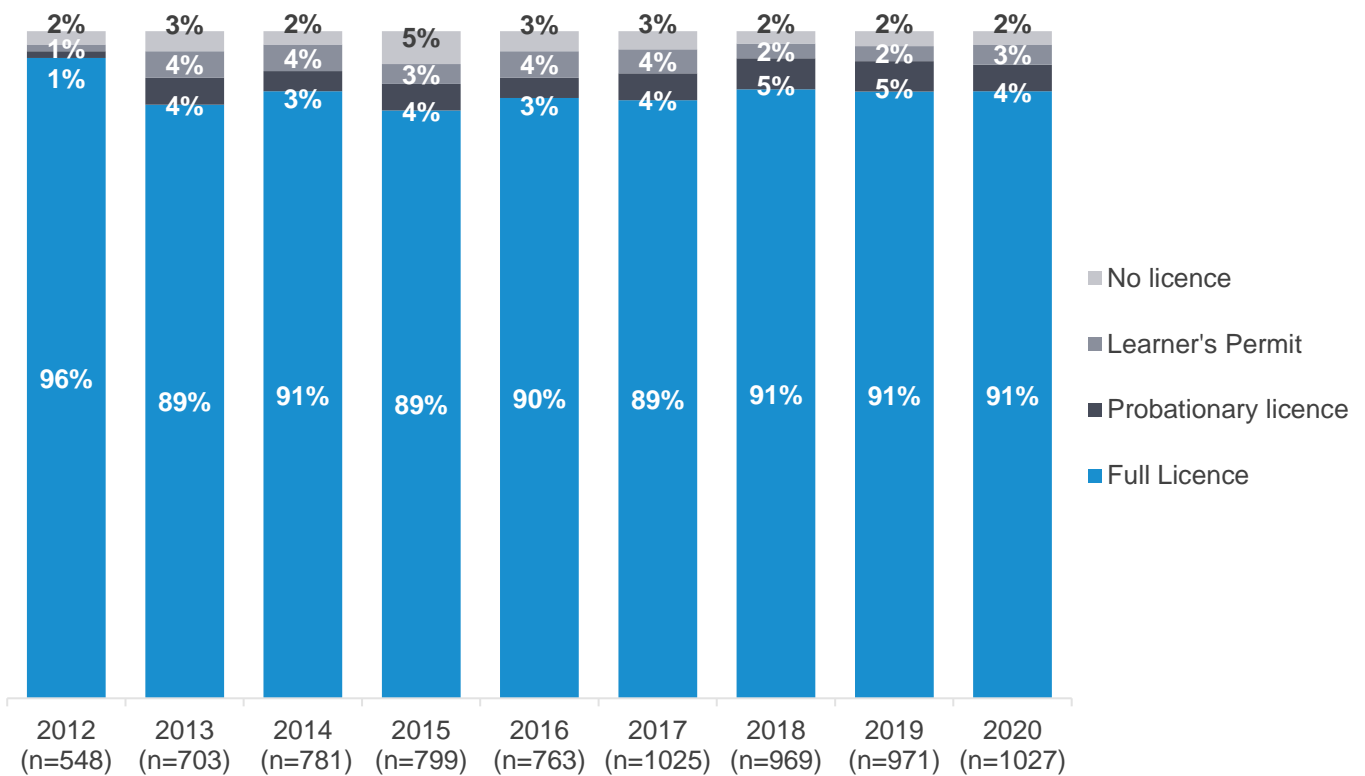
3.2 Learning to ride and riding skills

Respondents were asked questions relating to learning to ride, including about their licence or permit, their attitudes to training courses their views of their own riding ability.

3.2.1 Type of motorcycle licence held

As shown in Figure 6, among total respondents, most hold a full licence (91%). One in twenty-five (4%) hold a probationary licence (P-Plates), one in thirty-three (3%) a learner’s permit, and one in fifty (2%) has no licence.

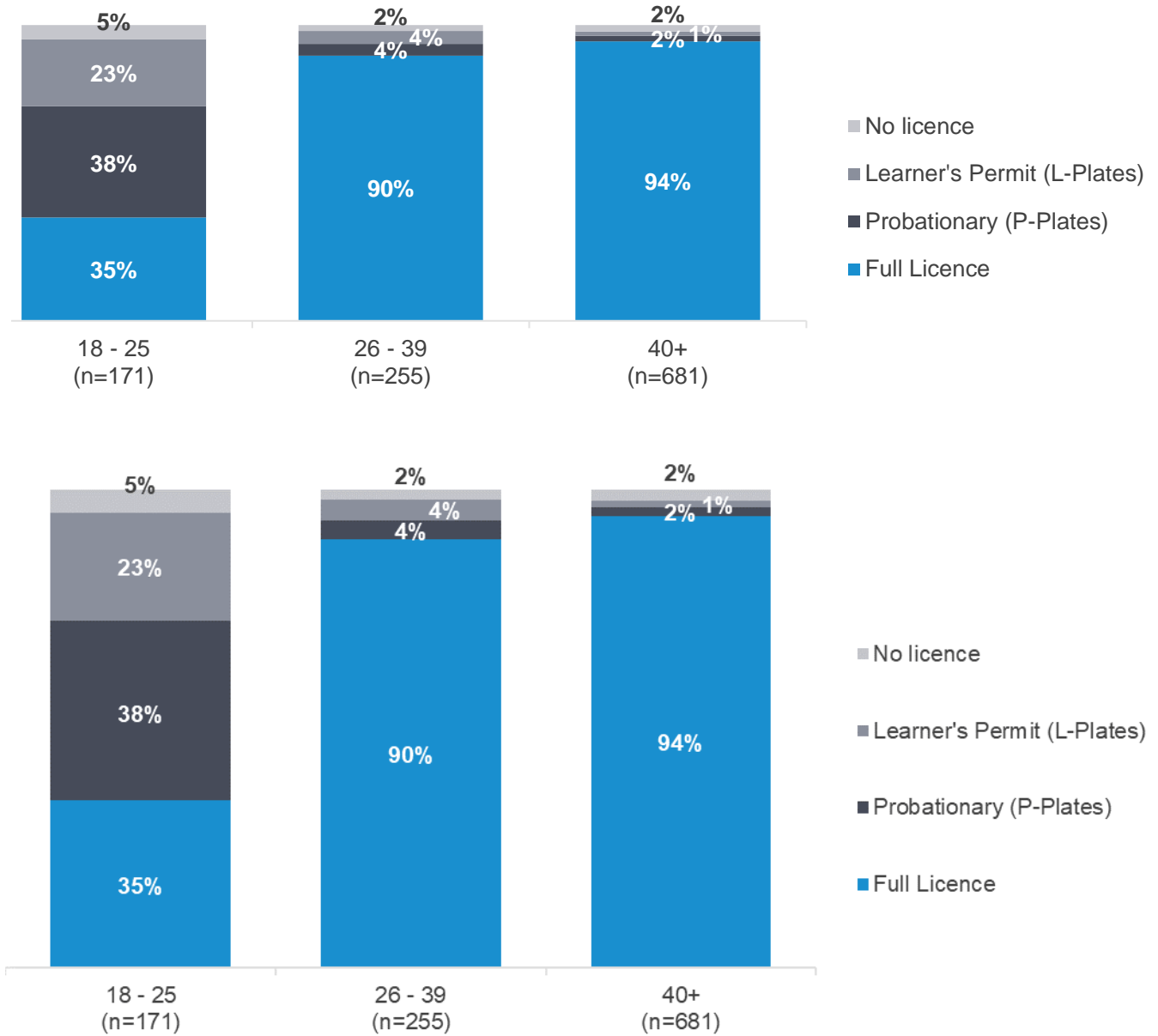
Figure 6 Type of motorcycle licence held (2012 – 2020)



LIC1. - Do you have a motorcycle licence?
 Total 2020 sample; Weighted sample; total n=1027
 Figures may not add to 100% due to rounding

As shown in Figure 7, the percentage of total respondents holding a full licence varies significantly by age. While 94% of those aged 40 or over have a full licence, as do 90% of those aged 26-39, only 35% of those under 26 have a full licence. Among those aged 18-25, 38% have a probationary licence and 23% hold learner permits.

Figure 7 Motorcycle licence type by age



LIC1. - Do you have a motorcycle licence?
 Total 2020 sample; Weighted sample; total n=1027
 Figures may not add to 100% due to rounding

3.2.2 Age when started riding a motorcycle

All respondents were asked at what age they started riding a motorcycle. The majority started riding between the ages of 11-17 years (31%) or 18-25 years (33%). A sizable minority (17%) started riding when aged 10 or younger while a similar percentage started riding when aged older than 25 years (11% aged 26-39 years and 7% aged 40 or older). The age at which riders start riding varies by demographic and type of riding:

- Females are more likely than males to start riding when older, with 43% of females starting riding aged 26 or older versus 13% of males.
- Respondents living outside Major Urban areas are most likely to start riding aged 10 or younger (23% vs 12% of those living in Major Urban areas).
- Recreational (35%) and Off-road (20%) riders are more likely than Commuters (18%) to start riding when aged 10 or younger.

Table 5 Age when started to ride a motorcycle

Column %	Total	Gender		Location			Type of rider		
		Male	Female	Major Urban	Other Urban	Rural Balance	Commuter	Recreational	Off-road
Up to 10 years	17	18	13	12 ↓	23 ↑	24 ↑	18	20 ↑	35 ↑
11-17 years	31	35 ↑	16 ↓	29	34	37	31	34	34
18-25 years	33	35	28	37 ↑	29	26	32	29 ↓	24 ↓
26-39 years	11	9 ↓	21 ↑	15 ↑	6 ↓	8	14	11	5 ↓
40 years or older	7	4 ↓	22 ↑	7	8	5	7	6	2 ↓
<i>Column n</i>	1029	838	191	571	302	156	480	649	322

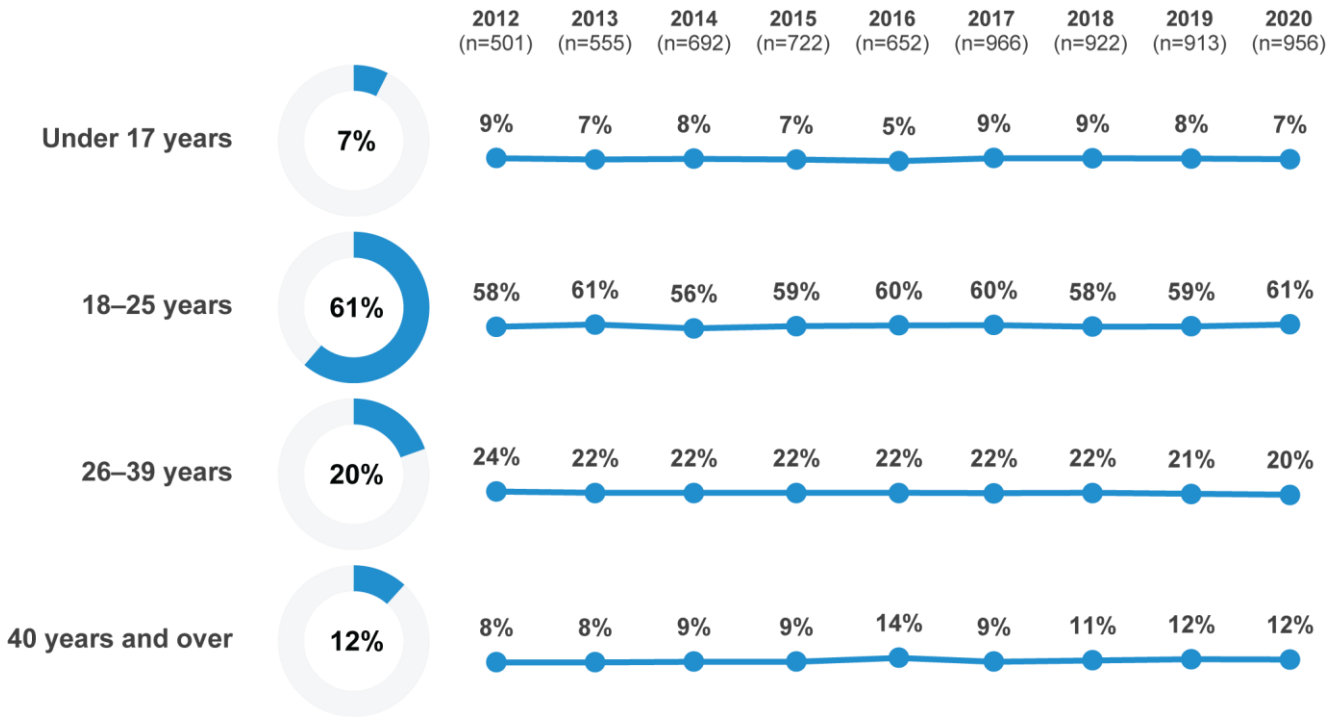
L1 At what age did you start riding a motorcycle?
 Total sample; Weighted sample; base n=1029,
 Figures may not add to 100% due to rounding

3.2.3 Obtaining a motorcycle licence

As shown in Figure 8, the majority (61%) of full and probationary licence holders were aged between 18 and 25 years when they obtained their licence. 20% obtained their licence between the ages of 26 and 39 and 12% when aged 40 and older.

The results from the 2020 survey are similar to earlier waves of this research.

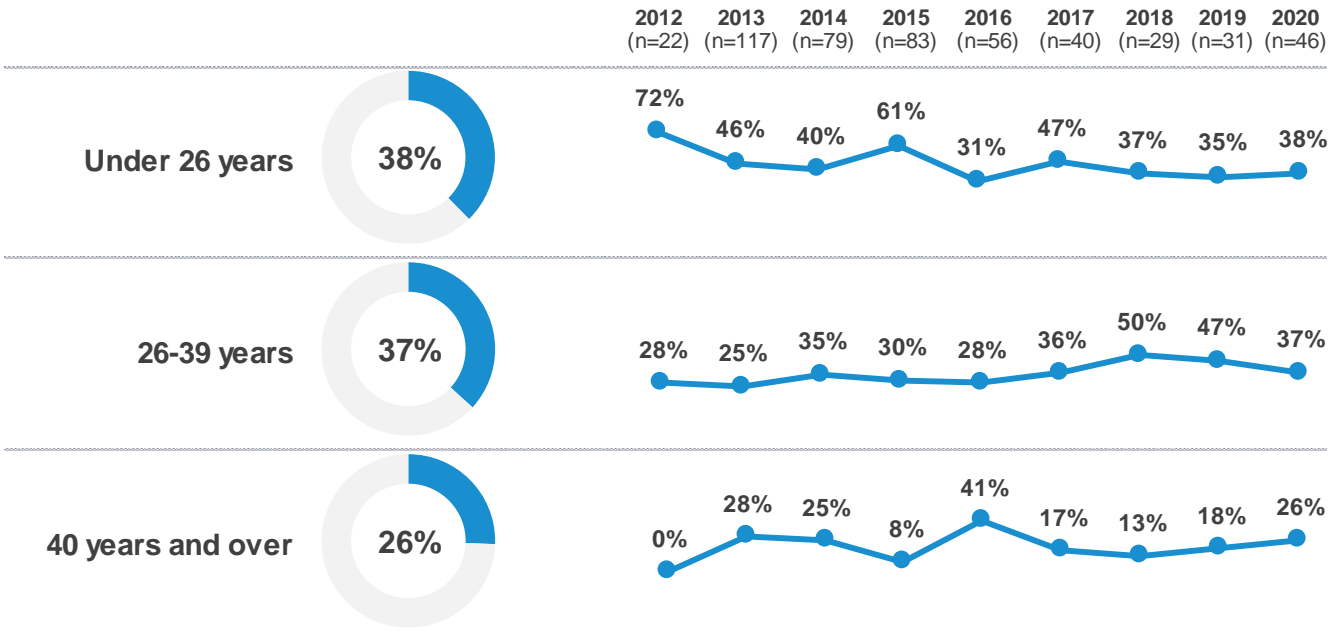
Figure 8 Age that full or probationary licence was obtained (2012 – 2020)



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
 Figures may not add to 100% due to rounding

As shown in Figure 9, close to four-in-ten (38%) of those with a learner permit obtained it aged 26 years or younger, while a similar percentage (37%) obtained it between the ages of 25 and 39.

Figure 9 Age that learners permit was received (2012 – 2020)



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
 Figures may not add to 100% due to rounding

3.2.4 Self-perception of riding ability

As shown in Table 6, among all respondents, many have a favourable view of their own riding ability. They are more likely to think of themselves as being a ‘better rider’ (47%) than a ‘worse rider’ (6%) compared to ‘the average rider on Victorian roads’. Two in five (40%) consider themselves ‘an about average rider’. Considering demographic differences in perceived riding ability:

- Those aged 26-39 are the most likely age group to consider themselves ‘better riders’ (53%)
- Males are more likely than females (51% vs 26%) to consider themselves to be ‘better riders’ than the average rider on Victorian roads.

Table 6 Self-perception of riding ability

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Better rider	47	51 ↑	26 ↓	49	53 ↑	44 ↓	48	45	42
NET: Worse rider	6	4 ↓	11 ↑	8	4	6	6	5	8
A much better rider	9	11 ↑	1 ↓	6	12	8	11	6 ↓	11
A better rider	18	20 ↑	11 ↓	23	20	17	19	19	12
A slightly better rider	19	20	14	21	20	19	19	20	20
An about average rider	40	38 ↓	48 ↑	40	36	41	38	41	45
A slightly worse rider	3	3	5	5	2	4	3	3	7
A worse rider	1	1	2	3	1	1	2	1	1
A much worse rider	1	0 ↓	4 ↑	0	1	1	1	1	0
Don't know	8	7 ↓	14 ↑	3 ↓	8	9	8	9	5
<i>Column n</i>	<i>1036</i>	<i>844</i>	<i>192</i>	<i>171</i>	<i>257</i>	<i>608</i>	<i>576</i>	<i>304</i>	<i>156</i>

L5. - Thinking about how you compare to the average rider on Victorian roads, would you say you are...
 Total sample; Weighted sample; total n=1036. Figures may not add to 100% due to rounding.
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category

3.2.5 Brushing up on skills

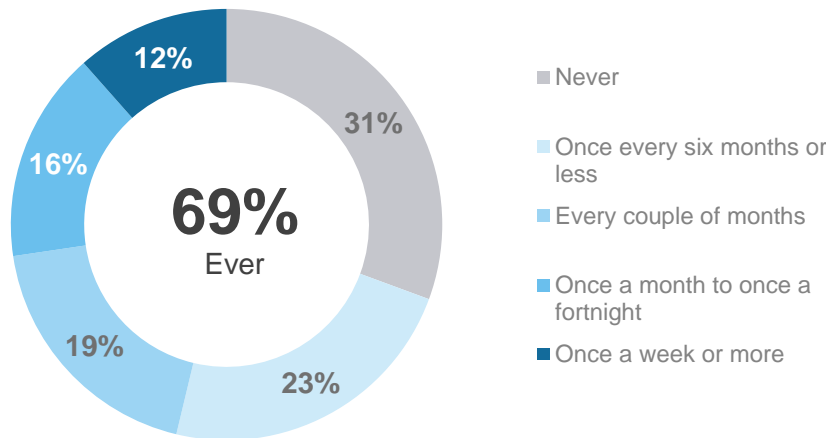
Riders who had ridden in the last 12 months were asked how frequently they brush up on their riding skills and which resources they had used to brush up on skills.

Frequency of brushing up on skills

Considering the percentage of motorcyclists who ever brush up on their skills, as shown in Figure 10, three-in-ten (31%) never brush up on their skills, while seven-in-ten (69%) do so at least occasionally. One-in-eight (12%) report brushing up on their skills at least once a week, while one-in-six (16%) do so between once a month and once a fortnight. Considering differences in brushing up on skills among riders:

- Riders aged 18-25 are most likely to brush up on their skills at least once a month (48% vs 26% of older riders).
- Riders who perceive themselves as 'better than average' brush up on their skills more frequently (31% at least 'once a month') than those who believe they are 'worse than average' (17% at least 'once a month').

Figure 10 Frequency of brushing up on skills



L4 How frequently do you brush up your motorcycle skills to keep up to date with riding?
Filter: Those who have ridden in the last 12 months; Weighted sample; Base n=790
Figures may not add to 100% due to rounding

Resources used to brush up on skills

Motorcyclists who ever brush up on their skills were asked which resources they use to do this. As shown in Table 7, the top three resources used are ‘friends or family’ (48%), YouTube (37%) and ‘a motorcycling website’ (35%). There are a number of differences in the resources different types of riders use to brush up on their skills. There include:

- Motorcyclists ages 26-39 are most likely to turn to ‘friends and family’ (60%) to brush up on their skills
- Motorcyclists ages 18-25 (56%) or 26-39 (50%) are more likely than those aged 40 and older (29%) to use ‘YouTube’ to brush up on their skills
- Motorcyclists in Major Urban areas (39%) are more likely than those living in Other Urban areas (28%) to turn to ‘a motorcycling website’.
- Motorcyclists aged 40 or older (23%), those living in Other Urban areas (28%) and those who ride Off-road (27%) were most likely to say they brush up on their skills ‘somewhere else’.

Table 7 Resources used to brush up on skills

Column %	Total	Age group			Location			Type of rider		
		18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance	Commuter	Recreational	Off-road
Friends or family	48	54	60 ↑	43 ↓	47	51	48	46	50	44
YouTube	37	56 ↑	50 ↑	29 ↓	40	33	33	40	39 ↑	36
A motorcycling website	35	28	32	37	39 ↑	28 ↓	33	40 ↑	39 ↑	27 ↓
Magazines or books	24	15	18	27 ↑	23	26	25	24	24	23
A riding school	16	18	16	16	19	11	12	18	14	17
Another website	11	8	16	9	13	6 ↓	14	13	12 ↑	11
Somewhere else	19	13	12 ↓	23 ↑	15 ↓	28 ↑	18	17	18	27 ↑
Column n	576	134	142	300	317	170	89	361	476	247

L4B - Which of the following resources do you use to brush up on your skills?

Filter: Ever brushes up on skills; Weighted sample; total n=576. Figures may not add to 100% due to rounding

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

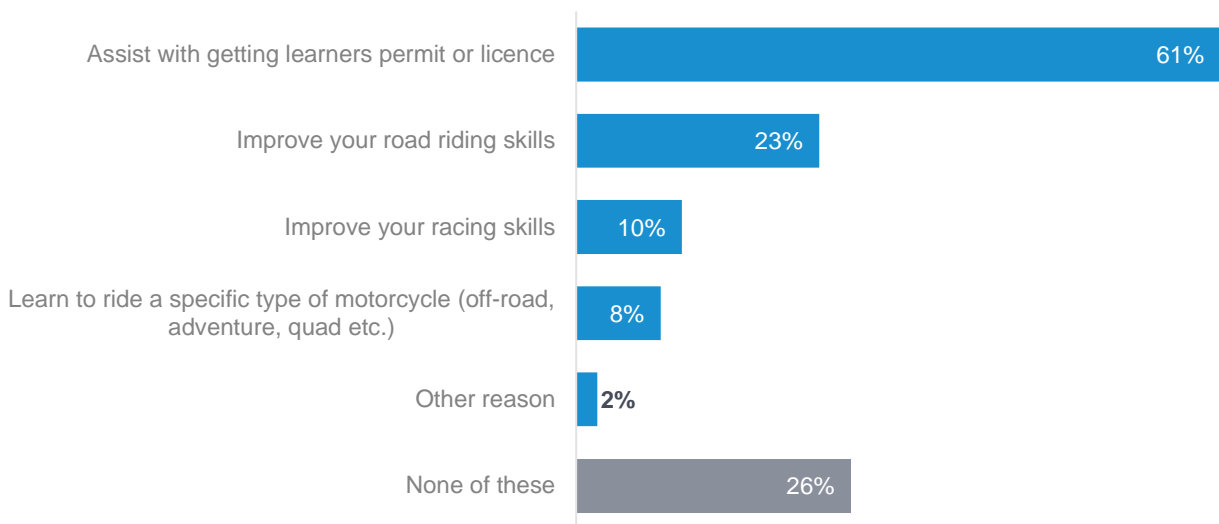
3.2.6 Motorcycle training

Respondents who had ridden in the past 12 months were asked about motorcycle training they have ever attended and how long ago their most recent training was. They were also asked whether they agree or disagree that motorcyclists returning to riding after a break should have to undertake training.

Reasons for attending motorcycle training

Three-quarters (74%) of respondents who had ridden in the past 12 months had ever attended motorcycle training, with the most common reason being assistance in 'getting a learners permit or licence' (61%). Other training purposes included 'improving your road riding skills' (23%), 'improving your racing skills' (10%) and 'learning to ride a specific type of motorcycle' (8%).

Figure 11 Reasons for attending motorcycle training

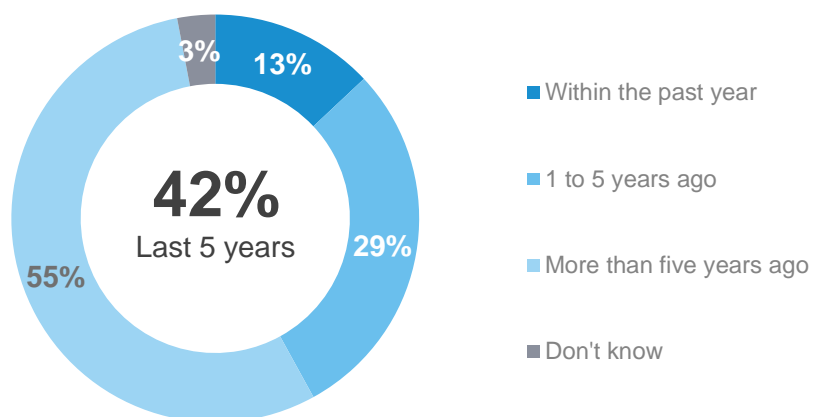


L6 Have you ever attended a motorcycle rider training course for any of the following reasons?
Filter: Those who have ridden in the last 12 months; Weighted sample; Base n=790
Figures may not add to 100% due to rounding

When last motorcycle training course was attended

About four-in-ten (42%) of motorcyclists who have ever attended motorcycle training have done so in the last five years, with about one-in-eight (13%) having done so in the past year. The type of training most likely to have been in the last five years includes 'improving your road riding skills' (50% in the last five years) and 'learning to ride a specific type of motorcycle' (61% in the last five years).

Figure 12 When last motorcycle training course was attended



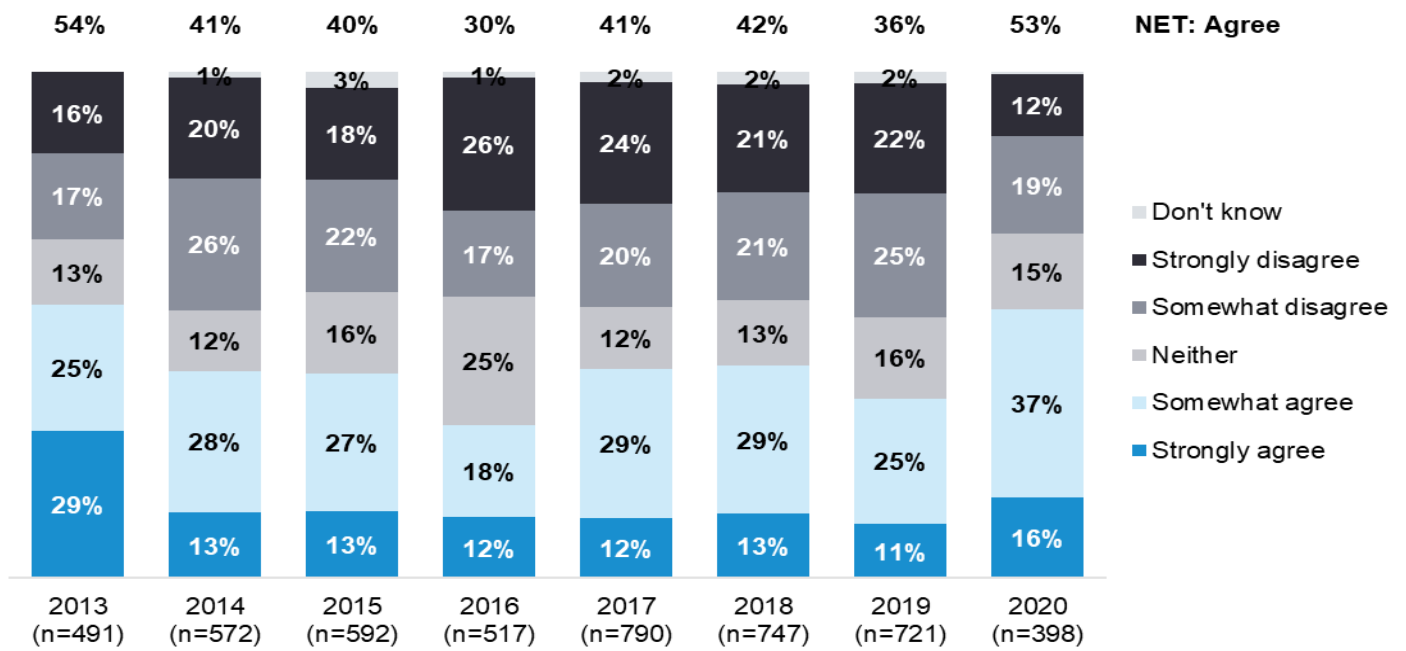
L7 How long ago did you most recently attend a motorcycle training course?
Filter: Ever attended motorcycle training; Weighted sample; Base n=602
Figures may not add to 100% due to rounding

Attitudes towards rider training courses after a break

As shown in Figure 13, more than a half of respondents who have ridden in the last twelve months (53%) agree (strongly or somewhat) with the statement that ‘people returning to riding after a break should have to undertake a motorcycle training course’, while 31% disagree. A further 15% neither agree nor disagree with this statement.

This is a significant increase from 2019 where 36% agreed and similar to the sentiment recorded in 2013 (54%).

Figure 13 Attitude to training when returning to riding after a break (2013 – 2020)



AT6. - To what extent do you agree or disagree with the following statements - People returning to riding after a break should have to undertake a motorcycle training course
 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=517; 2017 base n=790; 2018 base n=748, 2019 base n=721, 2020 base n=398
 Figures may not add to 100% due to rounding

3.3 Riding Activity

Respondents were asked a number of questions about their level of riding activity, and if they are active riders, their purposes for riding.

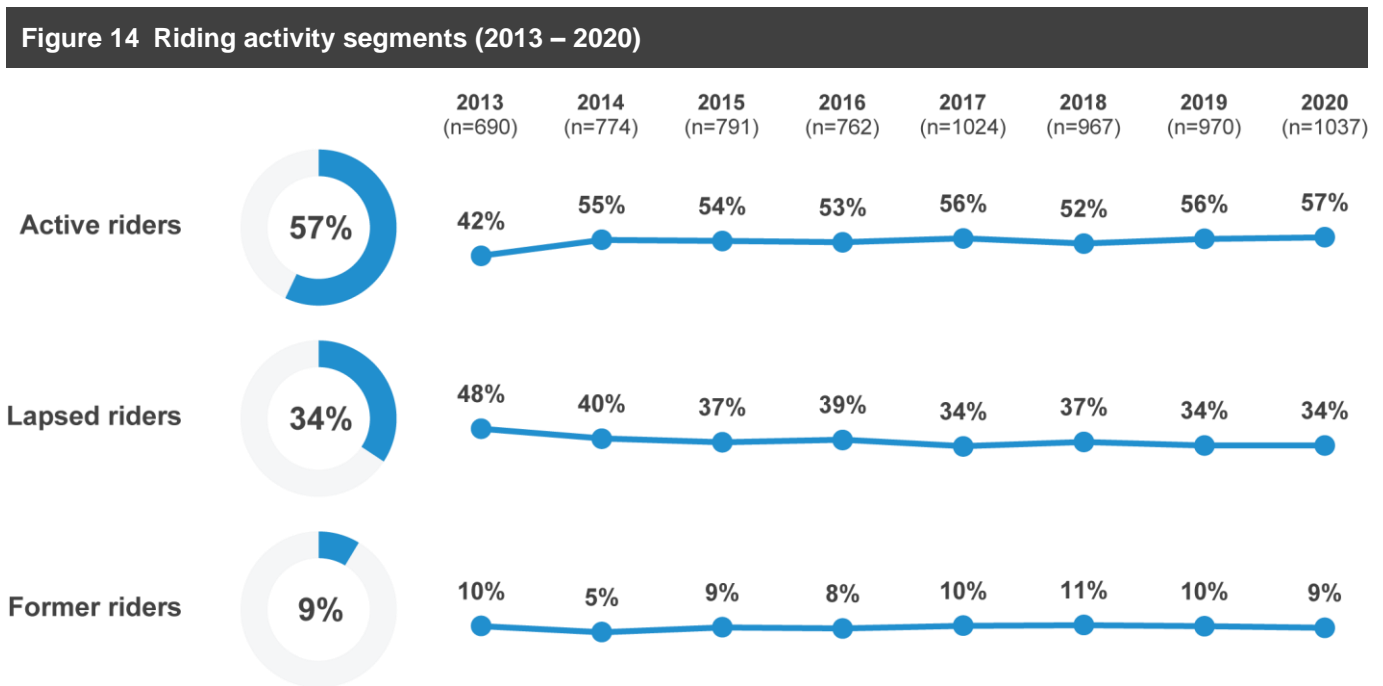
3.3.1 Riding activity segments

As shown in Figure 14, respondents have been allocated to three segments based on their riding history and recent riding behaviours:

- Active Riders – those who have ridden in the last 12 months and/or have started riding again after a break
- Lapsed Riders – those who have stopped riding but may decide to ride again in the future, or have not ridden in the last 12 months but still consider themselves to be regular riders; or
- Former Riders – those who have stopped riding and do not intend to ride again.

Just over half of respondents (57%) are Active Riders, about one third (34%) of respondents are Lapsed Riders, and a smaller percentage (9%) are Former Riders.

Note that some Active Riders have not ridden in the last 12 months (4% of this group). Additionally, some Lapsed Riders (30%) and Former Riders (9%) have ridden in the last 12 months.

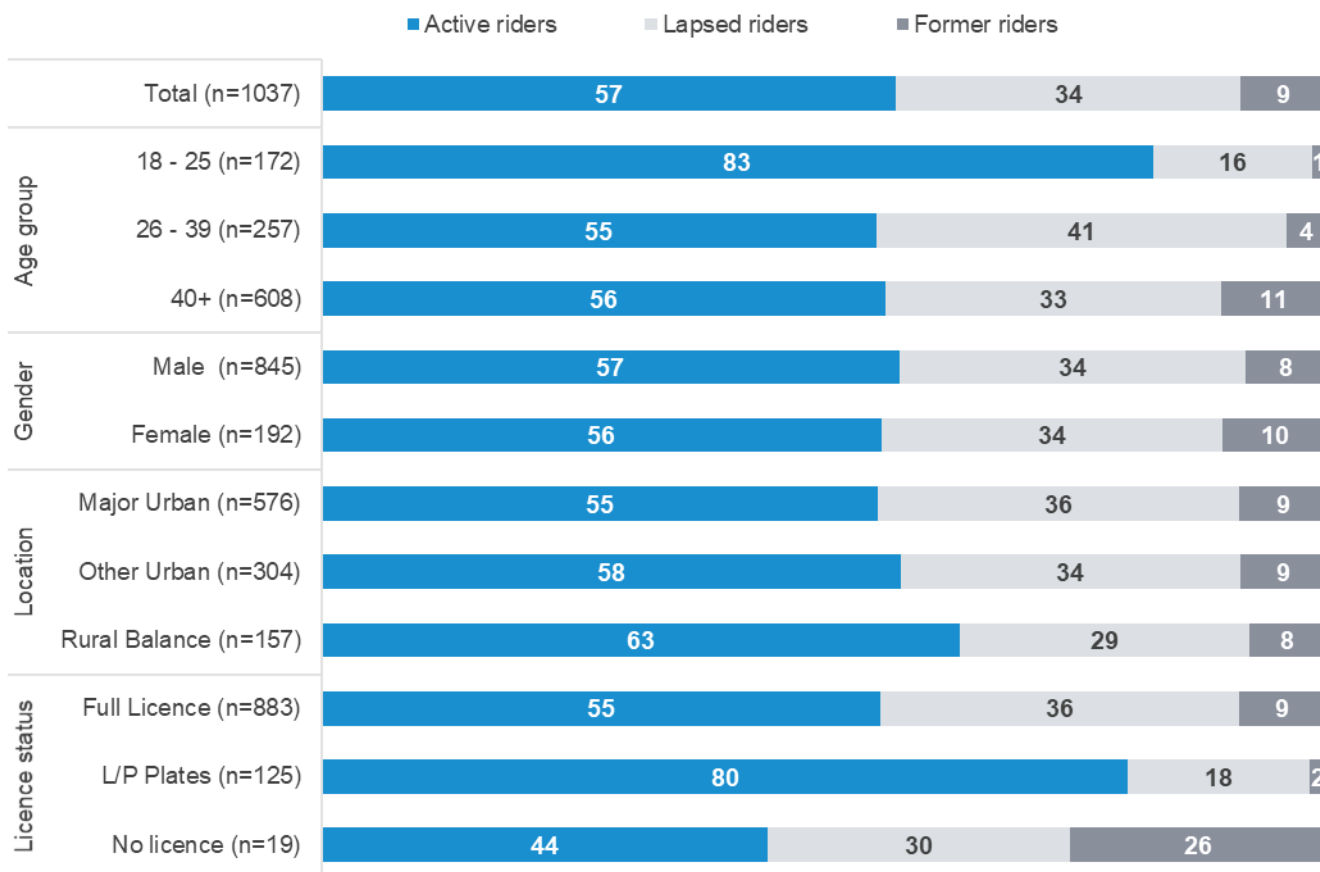


R4. - Which of the following best describes your motorcycle riding history?
 R1. - Have you ridden a motorcycle in the last 12 months (either on or off-road)?
 All respondents; Weighted, n=1,037
 Figures may not add to 100% due to rounding

Figure 15 shows the riding activity status by demographic and licence type. Groups with a high prevalence of Active Riders include:

- Those aged 18-25 (83% vs 56% among those aged 26 and over); and
- Probationary or learner permit holders (80% vs 55% among those with full licences).

Figure 15 Riding activity segments by selected rider characteristics



R4. - Which of the following best describes your motorcycle riding history?
 R1. - Have you ridden a motorcycle in the last 12 months (either on or off-road)?
 Filter: excludes never ridden a motorcycle; Weighted sample; Base n=1,037
 Figures may not add to 100% due to rounding

3.3.2 Riding activity in the last 12 months

As shown in Figure 16, among all respondents, two-in-three (66%) indicate they have ridden a motorcycle in the last 12 months. This has remained stable from 2019 (66%).

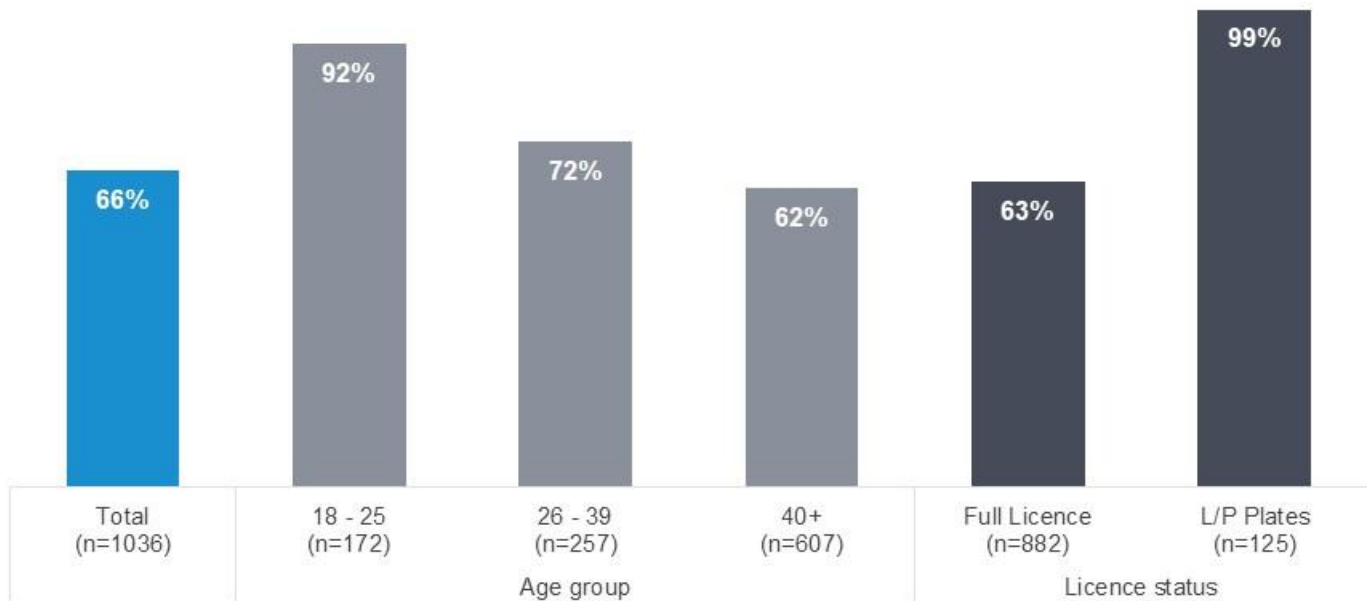
Figure 16 Riding activity in the last 12 months (2012– 2020)



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; 2020 base n=1,036

As shown in Figure 17, respondents aged between 18 and 25 (92%), and those on learner permits or with probationary licences (99%), are more likely than riders with full licences (63%) and those over 40 years (62%) to have ridden (either on- or off-road) in the last 12 months.

Figure 17 Riding activity in the last 12 months by age and licence type

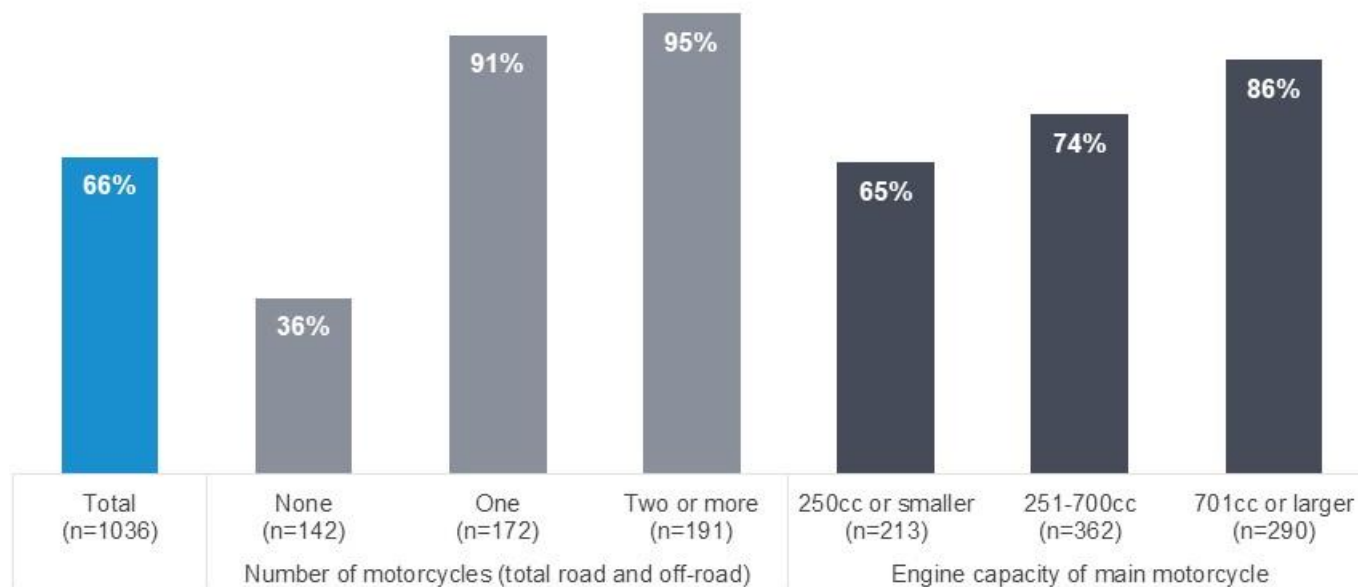


R1. - Have you ridden a motorcycle in the last 12 months (either on or off-road)?
 Filter: excludes never ridden a motorcycle; Weighted sample; Base n=1,036

As shown in Figure 18, respondents who do not have a motorcycle at home are less likely to have ridden in the last 12 months (36%) than those with one (91%) or two (95%) motorcycles at home.

Respondents with motorcycles with an engine capacity of 250cc or smaller were also less likely to have ridden in the last 12 months (65%) than those who had a motorcycle with an engine capacity of 701cc or larger (86%).

Figure 18 Riding activity in the last 12 months by motorcycle ownership



R1. - Have you ridden a motorcycle in the last 12 months (either on or off-road)?
 Filter: excludes never ridden a motorcycle; Weighted sample; Base n=1,036

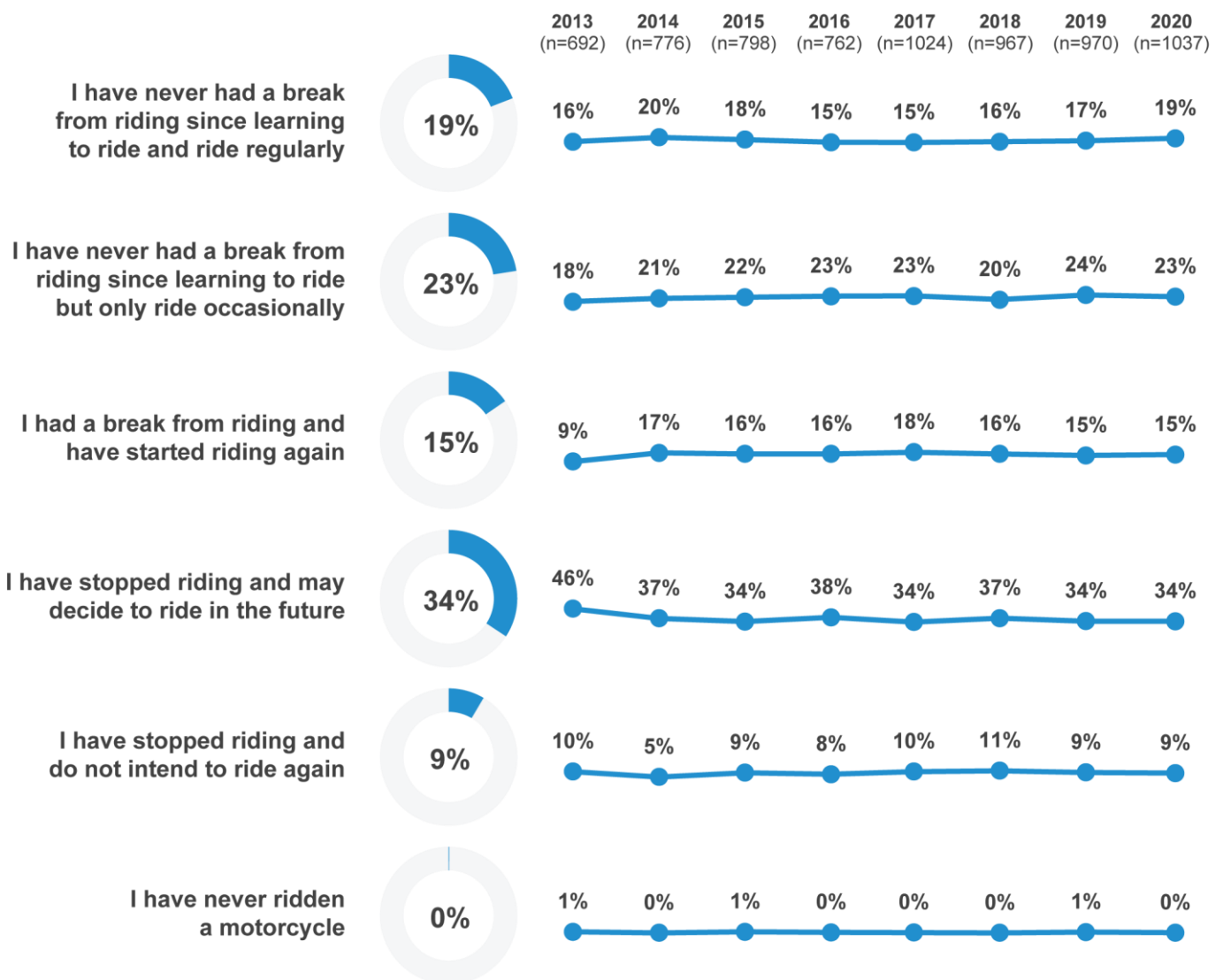
3.3.3 Riding breaks

As shown in Figure 19, among all respondents, nearly six-in-ten (57%) are currently riding (Active Riders) and their riding histories are:

- Never had a break from riding and ride regularly (19%)
- Never had a break from riding but only ride occasionally (23%)
- Had a break from riding and have started riding again (15%).

Three-in-ten (34%) have ‘stopped riding but may decide to ride again in the future’ while 9% have ‘stopped riding and have no intention of riding in the future’.

Figure 19 Types of breaks from riding (2013 – 2020)



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,

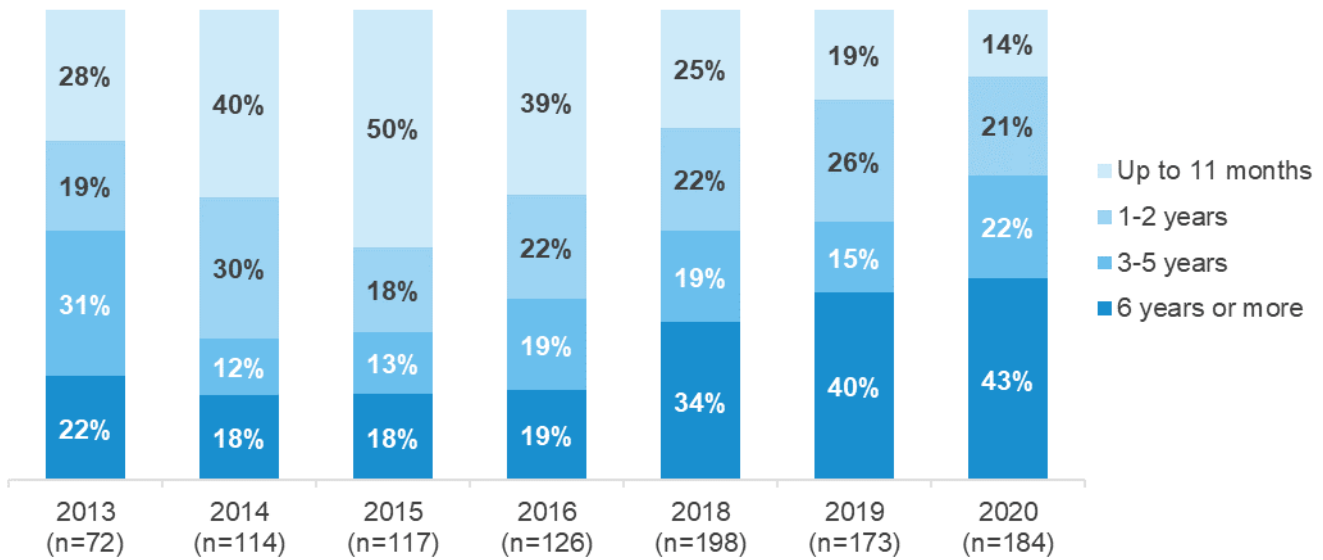
2016 base n=762, 2017 base n=1024, 2018 base n=971, 2019 base n=970, 2020 base = 1,037

Figures may not add to 100% due to rounding

Duration of most recent break from riding

As shown in Figure 20, 65% of respondents who have taken a break but have started riding again have done so after a break of three years or longer.

Figure 20 Duration of most recent break from riding (2013 - 2020)



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

Filter: Had a break from riding but started riding again

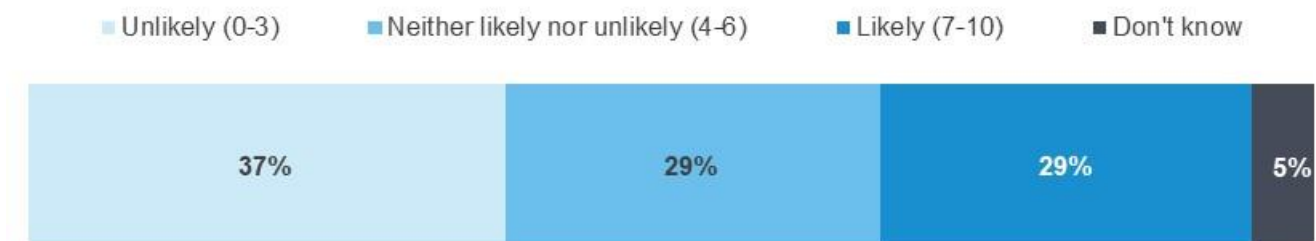
Weighted; 2013 base n=72; 2014 base n=114, 2015 base n=117, 2016 base n=126, 2017 base n=214, 2018 base n=198, 2019 base n=173, 2020 base n=184

Figures may not add to 100% due to rounding

Likelihood of lapsed riders riding again

Lapsed Riders were asked about their likelihood of riding again. As shown in Figure 17, Lapsed Riders were most likely to indicate that it was unlikely that they would ride again. Over one-third (37%) rate the likelihood at 0 to 3 (on a zero to ten scale where zero is 'extremely unlikely and ten is 'extremely likely').

Figure 21 Likelihood of lapsed riders riding again



R6. - What is the likelihood that you will ride again in the future?

Base: Lapsed Riders

Weighted sample; Base n=246

Figures may not add to 100% due to rounding

As shown in Table 8, Lapsed Riders aged 26-39 (42% rated their likelihood as 7 out of 10 or higher) are the most likely to indicate they are likely to ride again. Those aged 40 years and older are least likely (24%). However, those aged 40 and older display greater uncertainty, with 35% awarding a rating of 4-6 versus 16% of those aged 26-39 (the average likelihood for both age groups is 4.5 out of 10).

Table 8 Likelihood of lapsed riders riding again by demographic

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Unlikely (0-3)	37	38	32	68	42	34	39	34	37
Neither likely nor unlikely (4-6)	29	30	24	20	16 ↓	35 ↑	24	37	33
Likely (7-10)	29	27	36	12	42 ↑	24 ↓	30	26	31
Don't know	5	4	8	0	0 ↓	7 ↑	6	3	0
Average	4.5	4.4	4.7	2.7	4.5	4.5	4.4	4.6	4.6
Column n	246	195	51	24	84	138	144	69	33

R6. - What is the likelihood that you will ride again in the future?

Base: Lapsed Riders

Weighted sample; Base n=246

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

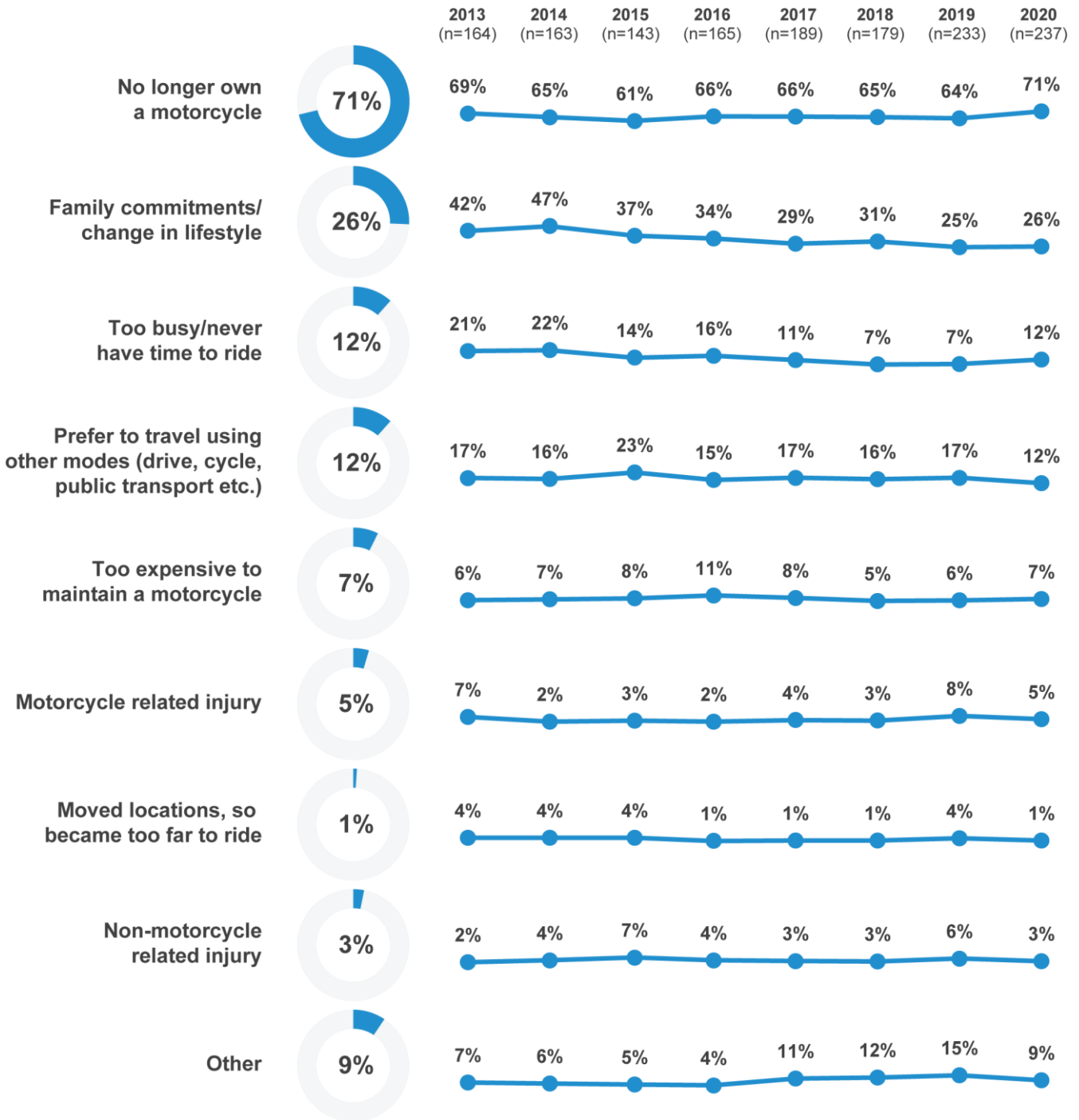
*Note: Small sample sizes

Figures may not add to 100% due to rounding

3.3.4 Reasons for no longer riding a motorcycle

As shown in Figure 22, among those who have not ridden in the 12 months, the most mentioned reasons for not riding are 'no longer own a motorcycle' (71%) and 'family commitments/change in lifestyle' (26%), followed by not having enough time to ride (12%) and preferring to use other modes of travel (12%).

Figure 22 Reasons why motorcyclists have not ridden in the last 12 months



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

3.3.5 Characteristics of Active Riders

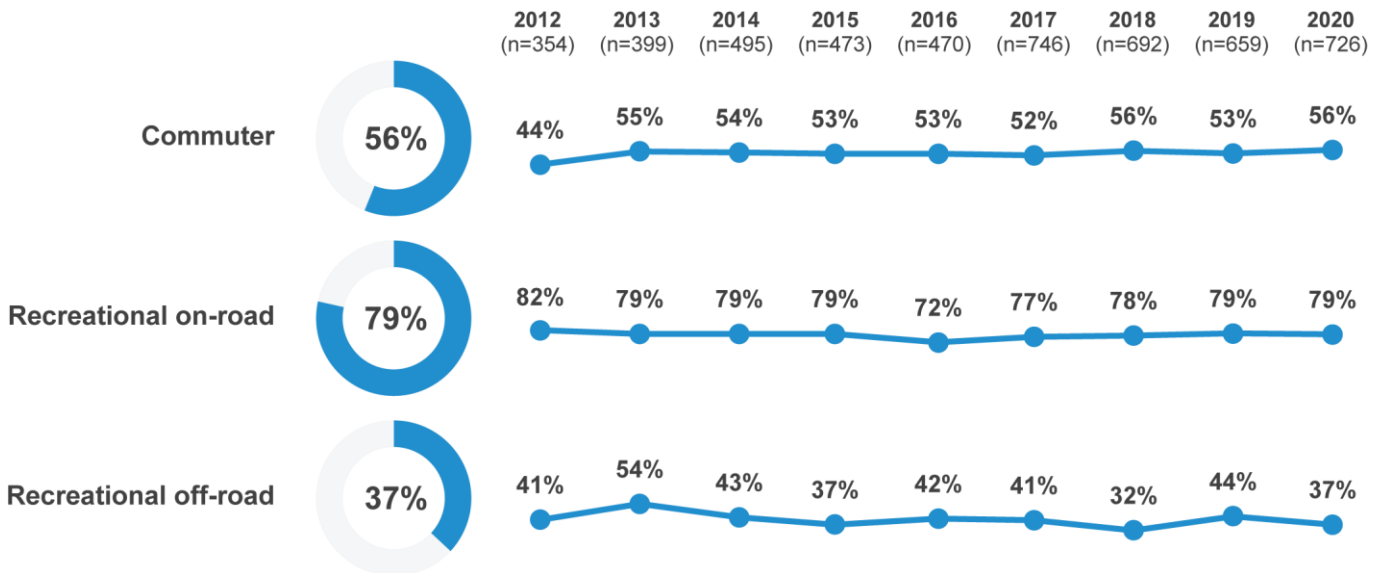
Active Riders were asked approximately what percentage of the time they ride in the following categories, excluding any riding they might have done for work purposes:

- Commuting purposes (going to work, study, shops)
- Recreation on-road (public roads, highways, freeways), and
- Recreation off-road (tracks in national parks or on private property).

If a respondent has ridden for any of the purposes above, they are then placed in that category (respondents can be allocated to more than one category).

As shown in Figure 23, Active Riders are most likely to be Recreational On-road Riders (79%), remaining stable from 2019. In 2020 there was a decline in Active Riders who are Off-Road Riders (37%) compared to 2019 (44%).

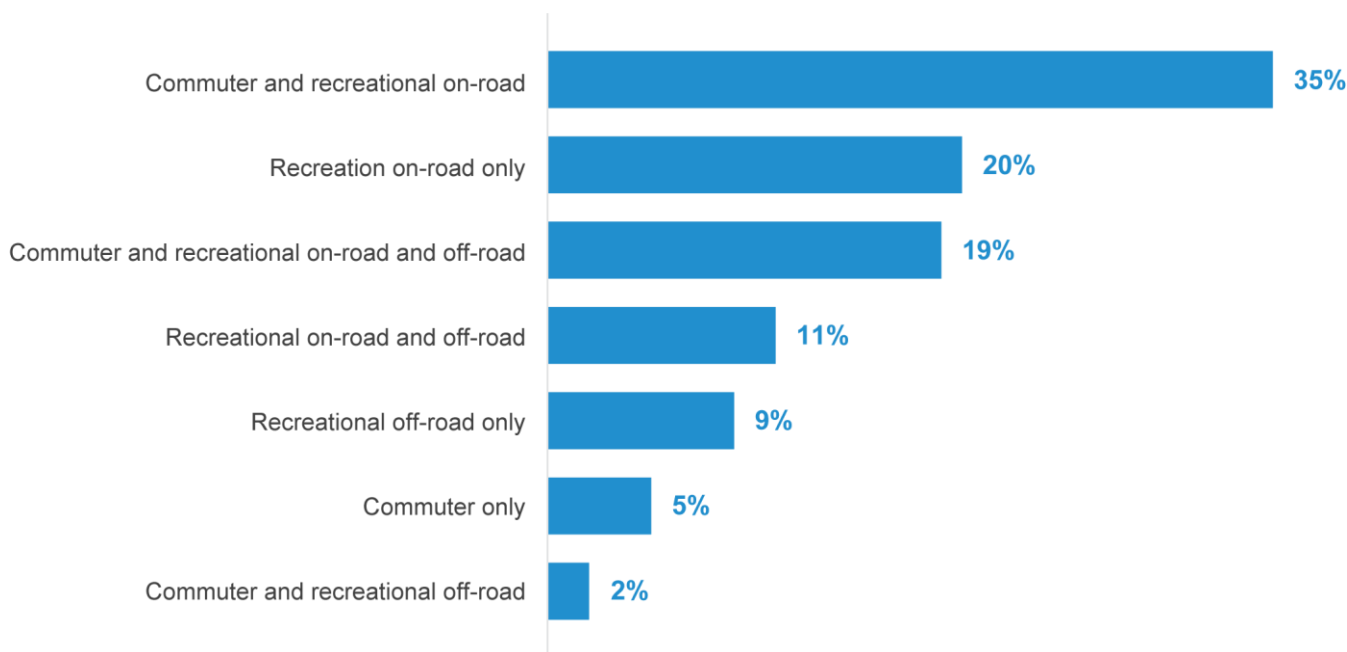
Figure 23 Active Riders by riding purpose (2012 – 2020)



TYP A/B/C. - Approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes?
 Filter: Active riders; Weighted; 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
 Note: Does not add to 100% as respondents could ride with more than one purpose

Figure 24 shows combinations of riding purposes. The most common combination of riding purposes is among those who both commute and ride recreationally on-road (35%). One-in-five (19%) ride for all three purposes.

Figure 24 Combinations of riding purposes among Active Riders



TYPAB/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 sample; 2020 base n=689

Figures may not add to 100% due to rounding

As shown in Table 9, there are several differences by demographic among Active Riders, including:

- Those aged 18-39 are most likely to be ride for all three purposes (29% of 18-25 year olds and 25% of 26-39 year olds vs 16% of those aged 40 and older)
- Those aged 40 and older are more likely than younger riders to only ride recreationally (23% versus 7% of 18-25 year olds and 14% of 26-39 year olds)
- Females are more likely than males to ride for commuting and recreational on-road purposes (5% vs 1%).

Table 9 Riding purpose by demographic

Column %	Total	Gender		Age		
		Male	Female	18 - 25	26 - 39	40+
Commuter and recreational on road	35	35	37	37	32	36
Recreational on-road only	20	20	22	7 ↓	14	23 ↑
Commuter and recreational on-road and off-road	19	20	14	29 ↑	25 ↑	16 ↓
Recreational on-road and off-road	11	12	6	10	14	10
Recreational off-road only	9	9	8	11	10	8
Commuter only	5	5	8	6	3	6
Commuter and recreational off-road	2	1 ↓	5 ↑	1	1	2
Column n	689	572	117	143	155	391

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?

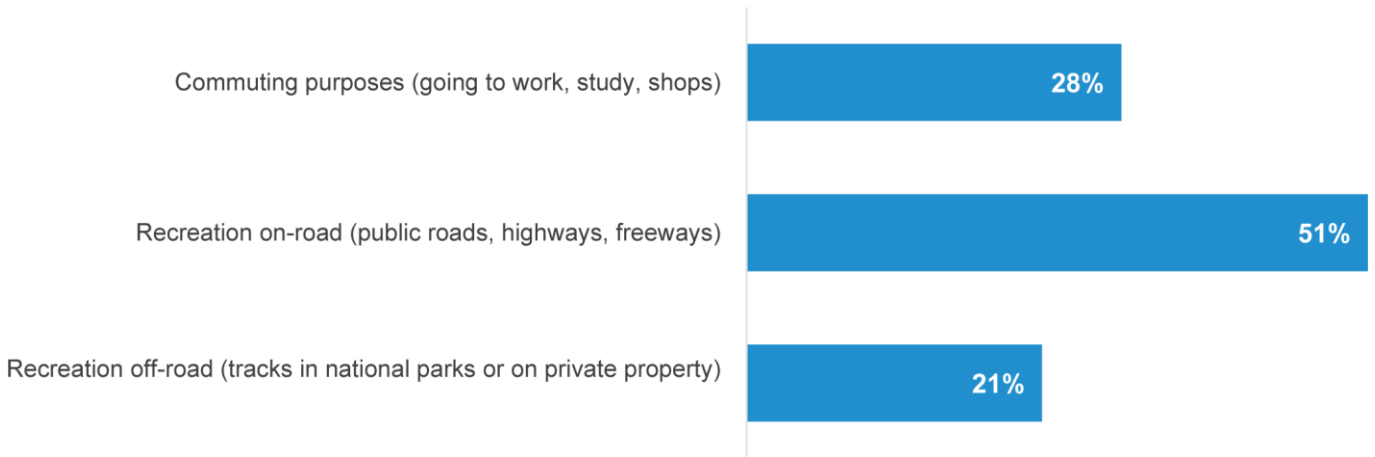
Filter: Active riders; Weighted; Base n=726

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

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

As shown in Figure 25, Active Riders spend more time riding their motorcycles for 'recreational on-road' purposes (51%) than for 'recreational off-road' (21%) or commuting (28%) purposes.

Figure 25 Shares of riding purposes for Active Riders



TYP A/B/C. - Approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes?
 Filter: Active riders; Weighted; 2012 base n=354; 2013 base n=399; 2014 base n=495; 2015 base n=473; 2016 base n=470; 2017 base n=715; 2018 base n=667, 2019 base n=640, 2020 base n=689
 Figures may not add to 100% due to rounding

As shown in Table 10, there are several differences in riding purpose by demographic among the Active Riders, including:

- Those aged 18-25 are most likely to ride for commuting purposes (41%)
- Those aged 40 and over are more likely to spend time riding 'recreationally on road' (54%) than younger riders (33% for 18-25 age group and 46% for 26-39 age group)
- Those in Major Urban areas are more likely to spend time riding for commuting purposes (35%) than those from elsewhere in Victoria but are less likely to spend time riding 'recreationally off-road' (15%).

These results are similar to those from 2019.

Table 10 Shares of Active Rider riding purposes by demographic

Average %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Commuting	28	27	33	41 ↑	28	27	35 ↑	20 ↓	19 ↓
Recreation on-road	51	51	51	33 ↓	46	54 ↑	50	56 ↑	43 ↓
Recreation off-road	21	22	17	27 ↑	26 ↑	19 ↓	15 ↓	24	38 ↑
Column n	689	572	117	143	155	391	375	203	111

TYP A/B/C. - Approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes?
 Filter: Active riders; Weighted; Base n=689
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category
 Figures may not add to 100% due to rounding

As shown in Table 11, among Active Riders there are also differences in riding purpose by motorcycle ownership and motorcycle engine capacity, including:

- Active Riders who have only one motorcycle at home are less likely to spend time riding recreationally off-road (12%) and more likely to spend time commuting (38%) than other Active Riders with more than one motorcycle (19%).
- Active Riders with larger engine capacity motorcycles (701cc and over) are more likely to spend time riding recreationally on-road (70%), whereas those with less powerful engine capacities are more likely to spend time riding recreationally off-road than those with larger engine capacities (250cc or smaller: 30%; 251-700cc: 33% versus 701cc or larger: 6%).

Table 11 Shares of Active Rider riding purposes by motorcycle characteristic

Average %	Total	Number of motorcycles kept at home			Engine capacity of main motorcycle		
		None	One	Two or more	250cc or smaller	251-700cc	701cc or larger
Commuting	28	22	38 ↑	19 ↓	36 ↑	30	24 ↓
Recreation on-road	51	63	50	51	34 ↓	37 ↓	70 ↑
Recreation off-road	21	15	12 ↓	30 ↑	30 ↑	33 ↑	6 ↓
Column n	689	23	151	173	132	282	246

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

Filter: Active riders AND excluding commuter/ recreational riding response error; Weighted; Base n=689

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

Figures may not add to 100% due to rounding

Active Riders who are Recreational on-road or Off-road riders were asked how often they ride in a group. As shown in Table 12, females were more likely to ride in a group ‘all of the time’ (23%), compared to males (10%). There were no significant differences between ages or location.

Table 12 Recreational group riding

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Ever	74	74	72	69	76	74	70	79	75
All of the time	12	10 ↓	23 ↑	12	16	11	12	10	15
Most of the time	21	19	28	25	23	19	19	26	17
About half the time	11	13 ↑	3 ↓	8	9	13	11	14	8
Some of the time	30	32 ↑	18 ↓	24	27	31	29	30	34
None of the time	26	26	28	29	24	26	29	21	25
Don't know	0	0	0	2 ↑	0	0	0	0	0
Column n	594	492	102	124	129	341	322	181	91

REC2. - When you go for a recreational ride, how often do you ride in a group (with at least one other rider)?

Filter: Active Riders; Recreational riding on or off-road; Weighted; 2020 base n=594

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

Active Riders who ever ride in a group were asked whether riding in a group makes them less or more cautious or whether it makes no difference to their riding style. As shown in Table 13, close to half of those who ride in a group (49%) indicate riding in a group makes no difference, while a similar proportion (45%) claim they become more cautious. Very few (6%) claim that it makes them less cautious.

Those who ride in a group who are aged over 40 years are more likely to indicate that they become ‘more cautious’ when riding in a group (50%), whereas those aged 26-39 (31%) are less likely to be ‘more cautious’ in a group than other age groups.

Table 13 Level of caution when riding in a group

Column %	Gender			Age			Location		
	Total	Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Less cautious	6	6	4	6	10	4	6	6	7
More cautious	45	46	38	35	31 ↓	50 ↑	44	46	45
No difference	49	48	58	59	58	45 ↓	50	49	49
Column n	450	370	80	88	104	258	233	144	73

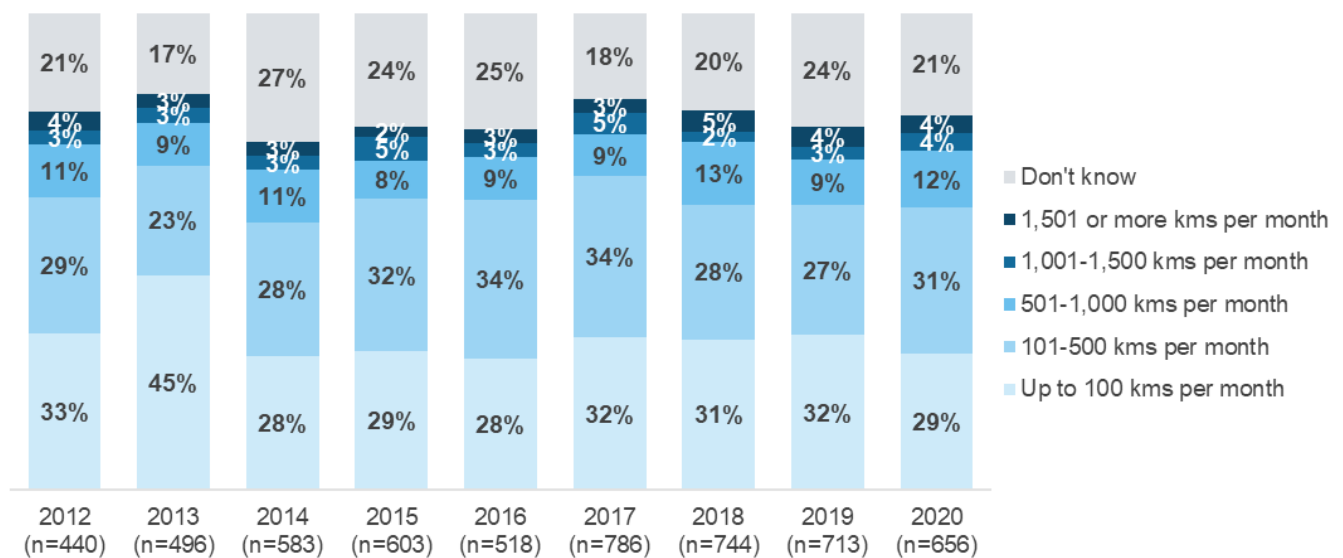
REC3. - Would you say that when riding in a group, you tend to be less cautious, more cautious or there is no difference to your riding style?
 Filter: Active Riders; Recreational riding on or off-road who ever ride in a group; Weighted; 2020 base n=450
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category

Distances ridden in the last 12 months

As shown in Figure 26, when estimating the distance they had ridden on a motorcycle for any reason in the last 12 months, respondents who have ridden in the last 12 months are equally likely to mention up to 100 km per month (29%) or 101-500 km per month (31%). Figure 20, below, shows findings for the period 2012 to 2020.

There are no significant differences by age, gender or location.

Figure 26 km/month ridden in last 12 months for any purpose (2012 – 2020)

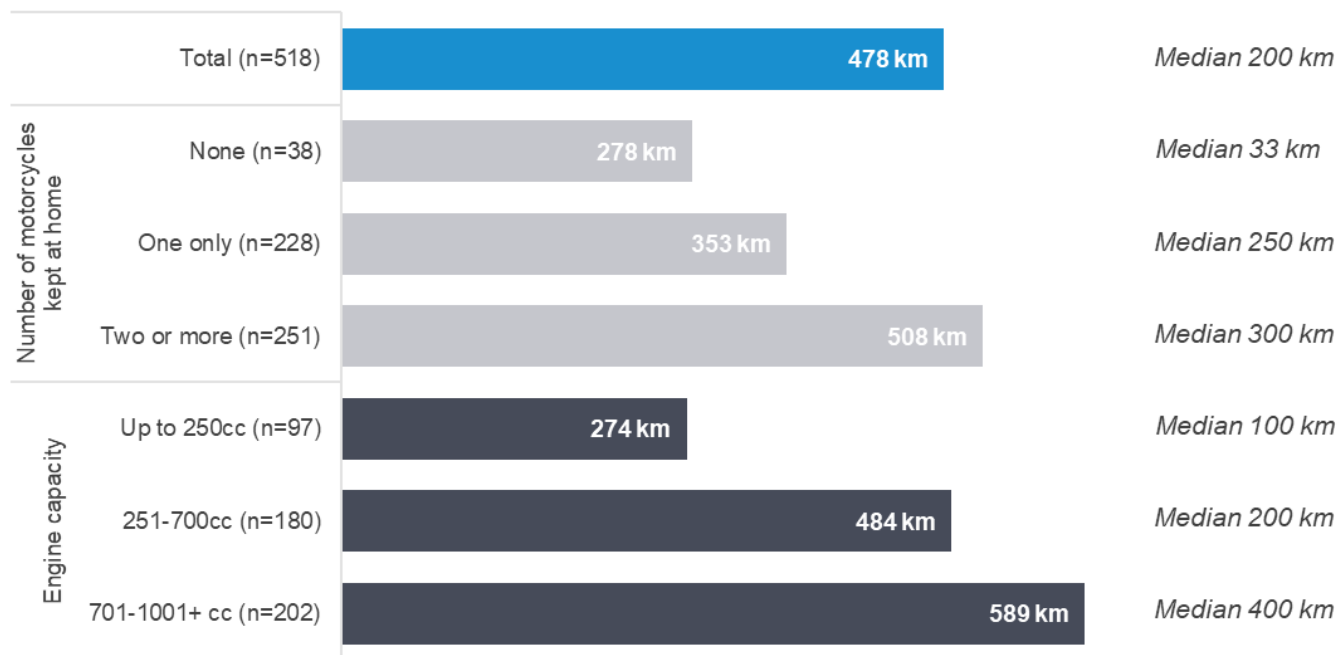


RID1A/B/C. - Thinking now about how many kilometres you rode ON ANY motorcycle on the road for any reason over the last 12 months... (Per week; per month or per year)
 Filter: Ridden in the last 12 months; Weighted; 2012 base n=440; 2013 base n=496; 2014 base n=583; 2015 base n=603; 2016 base n=518; 2017 base n=770; 2018 base n=728, 2019 base n=699, 2020 n=656
 Figures may not add to 100% due to rounding

As shown in Figure 27, the average distance ridden on a motorcycle by respondents who have ridden in the last 12 months is 478km per month and the median distance ridden is 200km.

Figure 27 also shows the distance ridden by motorcycle characteristic. Respondents with two or more motorcycles at home are likely to ride further each month (average distance of 508km per month).

Figure 27 km/month ridden in last 12 months by motorcycle characteristic

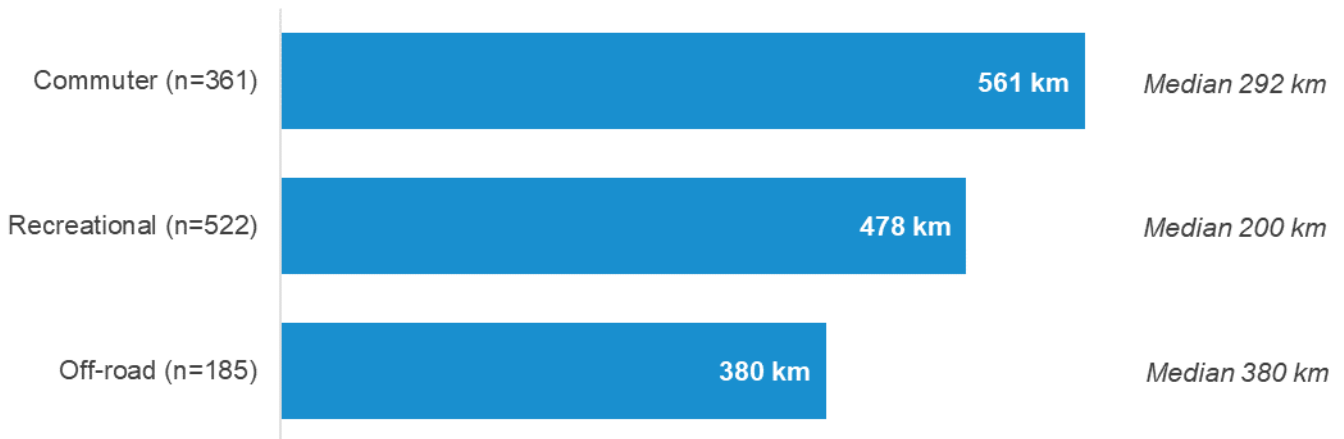


(Median km per month to the right of bar)
 RID1A/B/C. - In the last 12 months, how many kilometres did you ride ON ANY motorcycle on the road for any reason?
 Filter: Ridden in the last 12 months: Weighted; Base n=518

Average distance ridden for commuting, on-road and off-road recreational purposes among active riders

Figure 28 below shows average and median distances ridden per month by riding purpose among those who have ridden in the last 12 months. The chart shows that those who Commute ride a significantly longer average distance on-road per month (561km) compared to Recreation On-Road (478km) and Recreation Off-Road (380km).

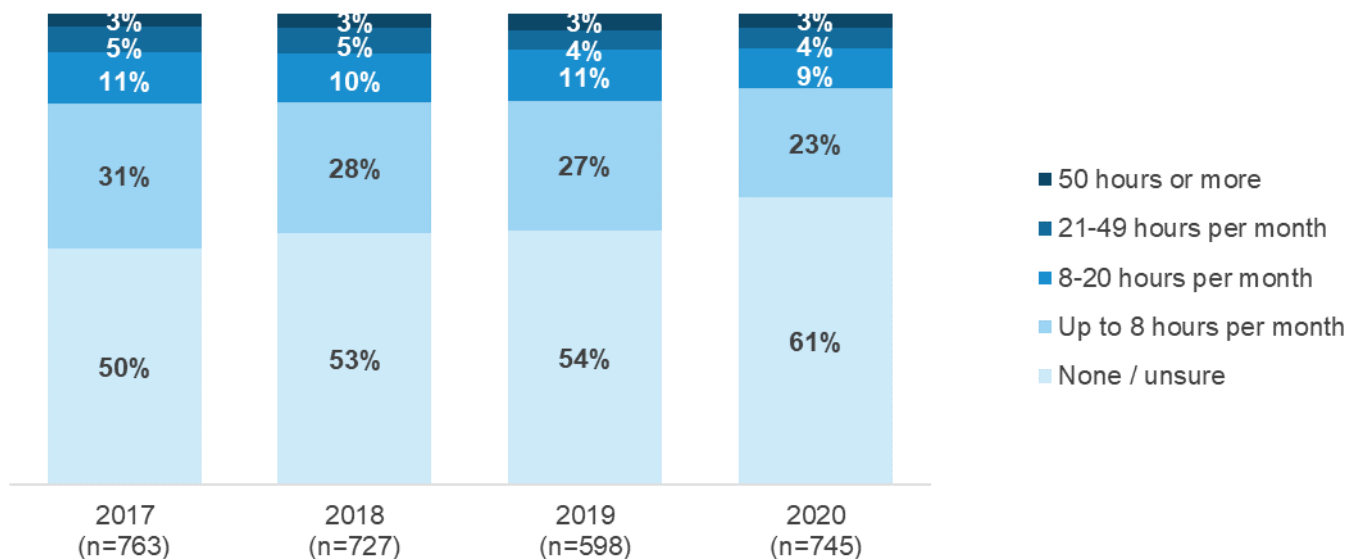
Figure 28 km/month ridden in last 12 months by riding purpose



(Median km per month to the right of bar)
 RID1A/B/C. - In the last 12 months, how many kilometres did you ride ON ANY motorcycle on the road for any reason?
 Filter: If ridden in the last 12 months; Weighted; Total n=529

Figure 29 shows the numbers of hours ridden off-road among respondents who have ridden in the last 12 months. Just over half (61%) reported that they had ridden zero hours off-road or were unsure. This is a significant increase from 2019 (54%). Almost a quarter (23%) ride, on average, up to 8 hours per month off-road, a further 9% ride between 8 and 20 hours and 7% ride off-road more than 20 hours on average each month.

Figure 29 Hours/month spent riding off-road (2017 – 2020)

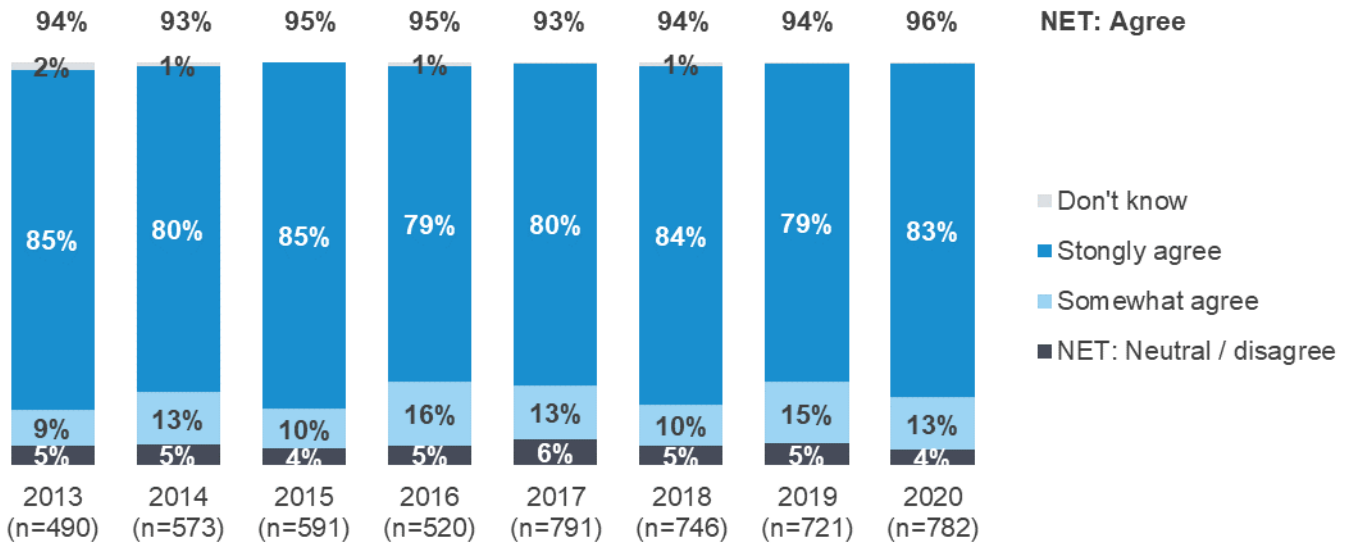


RID2A/B/C- Thinking now about how many hours you rode on any motorcycle off-road for any reason over the last 12 months? An approximate number is OK.
 Filter: If ridden in the last 12 months
 Weighted; 2017 base n=763; 2018 base n=727, 2019 base n=598, 2020 n=745
 Figures may not add to 100% due to rounding

Riding risk factors

Respondents who have ridden in the last 12 months were asked to what extent they agreed with a statement concerning fatigue. As shown in Figure 30, the large majority (96%) agreed or strongly agreed that ‘the only remedy for fatigue while riding is to stop riding and rest’, with 83% ‘strongly agreeing’. This finding has been consistent over the period 2013 to 2020.

Figure 30 Level of agreement with ‘the only remedy for fatigue’ statement (2013 – 2020)



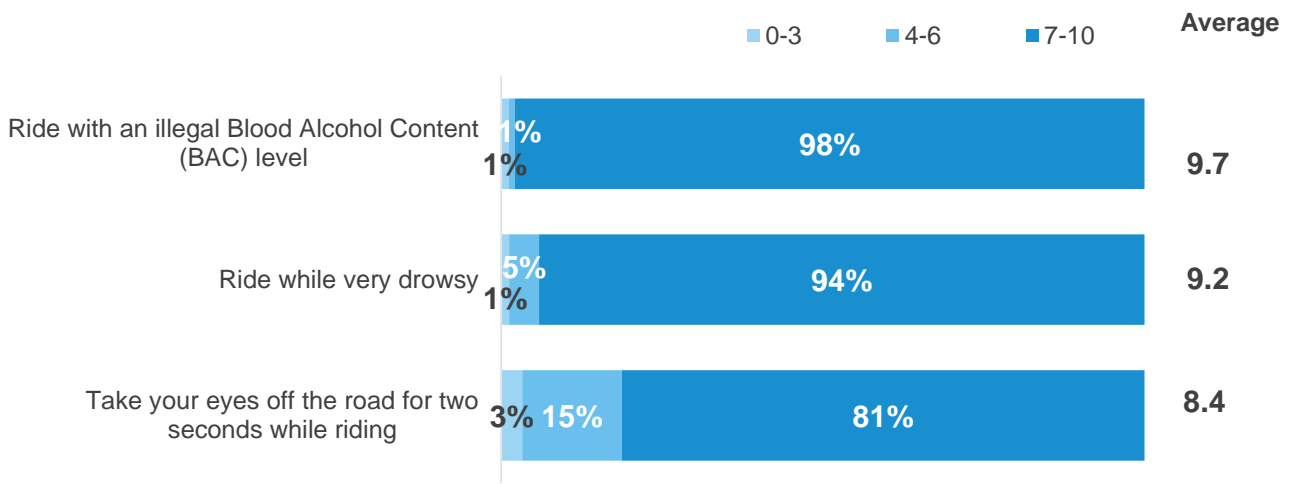
AT5. - Agreement/disagreement with statements about fatigue
 Weighted; 2013 base n=490; 2014 base n=573; 2015 base n=591; 2016 base n=520; 2017 base n=791; 2018 base n=747; 2019 base n=721, 2020 base n=780 / Neutral and don't know responses not shown
 Figures may not add to 100% due to rounding

Active Riders were asked to rate how dangerous they think three behaviours are by rating each behaviour on an eleven-point scale where 0 was not at all dangerous and 10 was extremely dangerous.

As shown in Figure 31, the vast majority provided a rating of seven or above for all the scenarios:

- 98% for riding with an illegal blood alcohol content
- 94% for riding while very drowsy
- 81% for taking your eyes off the road for two seconds while riding.

Figure 31 Rating of danger for three behaviours



DAN1-6. - Using a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to...
Active riders only; Weighted; 2020 base n=697
Figures may not add to 100% due to rounding

Respondents who have ridden in the last 12 months were also asked how often they have talked on a mobile phone using headphones while riding. As shown in Table 14, 6% indicate that they have done so. Those aged 18-25 (11%) were most likely to indicate they ever do this, compared to only 5% of those 40 and over.

Table 14 Talked on a mobile phone using headphones while riding

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Ever	6	7	4	11 ↑	8	5 ↓	7	5	4
All of the time	0	0	0	0	0	0	0	0	0
Most of the time	0	0	0	0	0	0	0	0	1
About half the time	1	1	1	2	2	0	1	1	1
Some of the time	5	5	3	9 ↑	5	4	5	4	3
None of the time	94	93	96	89 ↓	92	95 ↑	93	95	96
<i>Column n</i>	<i>777</i>	<i>640</i>	<i>137</i>	<i>158</i>	<i>189</i>	<i>430</i>	<i>427</i>	<i>225</i>	<i>125</i>

BEHC Talked on a mobile phone using headphones while riding
 Filter: Ridden in the past 12 months; Weighted; 2020 base n=777
 ↓↑ Indicates statistically significant difference compared to respondents not in that category

Rider risks

Respondents who have ridden in the last 12 months were asked the extent to which they agree or disagree with the statement 'I never take unnecessary risks while riding'. As shown in Table 15, three-quarters (76%) of respondents 'agree' or 'strongly agree' that they 'never take unnecessary risks while riding', while 12% disagree.

Respondents aged 18-25 years (21%) and those living in Rural Balance areas (21%) were most likely to disagree that 'I never take unnecessary risks while riding'.

Table 15 Taking unnecessary risks while riding

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Agree	76	76	76	66	71	79	78	76	65
NET: Disagree	12	11	16	21 ↑	16	10	11	11	21 ↑
Strongly agree	52	49 ↓	66 ↑	44	38 ↓	59 ↑	54	52	44
Somewhat agree	24	27 ↑	10 ↓	23	33 ↑	20 ↓	25	23	21
Neither	11	12	8	12	13	10	10	13	10
Strongly disagree	3	1 ↓	7 ↑	5	4	2	2	3	4
Somewhat disagree	10	10	9	16	12	8	9	8	17
Don't know	1	1	0	0	0	1	1	0	3
<i>Column n</i>	<i>397</i>	<i>324</i>	<i>73</i>	<i>88</i>	<i>94</i>	<i>215</i>	<i>223</i>	<i>113</i>	<i>61</i>

ATL. - To what extent do you agree or disagree with the following statement... I never take unnecessary risks while riding?
 Base: Ridden in the past 12 months; Weighted - 2020 base n=397

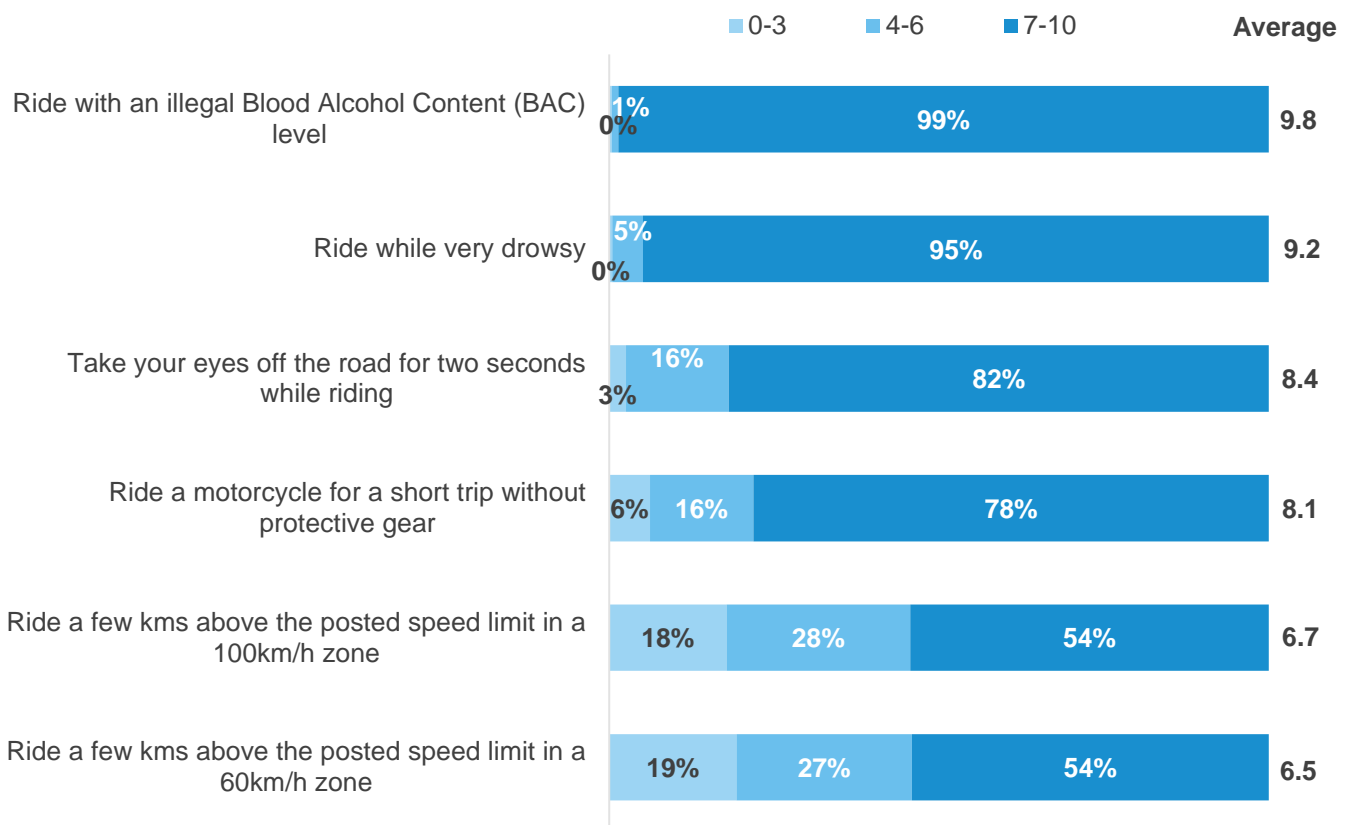
3.4 Perception of danger associated with riding behaviours

Figure 32 shows Active Riders' perception of danger associated with riding a few kilometres over the speed limit together with the perception of danger associated with three other behaviours. Just over half of active riders provided a rating between 7 and 10 of the danger of riding a few kilometres over the speed limit in a 60 km/h zone and a 100 km/h zone (both 54%).

As show in in Figure 32, Active Riders do not consider riding a few kilometres over the speed limit to be as dangerous as:

- Riding with an illegal BAC (99%)
- Riding while drowsy (95%)
- Taking your eyes off the road for two seconds (82%)
- Riding a motorcycle for a short trip without protective gear (78%).

Figure 32 Perception of danger associated with riding behaviours



DAN1-DAN6. - Using a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to ... Active riders only; Weighted; 2020 base n=344 to 693 Figures may not add to 100% due to rounding

3.5 Speed limit related behaviours and attitudes

This section presents findings relating to rider attitudes and behaviour regarding speed limits.

3.5.1 Speeding behaviour

As shown in Table 16, in 2020, around two-in-five respondents who have ridden in the last 12 months (39%) say they had intentionally ridden above the speed limit in a 60 km/h zone, even if by only a few kilometres per hour, in the last three months.

Table 16 Frequency of intentionally riding above the limit in a 60km/h zone (2017 – 2020)

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

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

↓↑ Indicates statistically significant difference compared to respondents not in that category
Figures may not add to 100% due to rounding

As shown in Table 17, in 2020, 42% of respondents who have ridden in the last 12 months reported intentionally riding above the speed limit in a 100 km/h zone in the last three months, a significant decrease from around half (51%) in 2019.

Table 17 Frequency of intentionally riding above the limit in a 100km/h zone (2017 – 2020)

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

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

↓↑ Indicates statistically significant difference compared to respondents not in that category
Figures may not add to 100% due to rounding

3.5.2 Attitudes towards speeding

This section presents findings relating to the perceived danger of riding over the speed limit and the extent to which riders would like to exceed the speed limit.

Perceptions of danger associated with riding over the speed limit

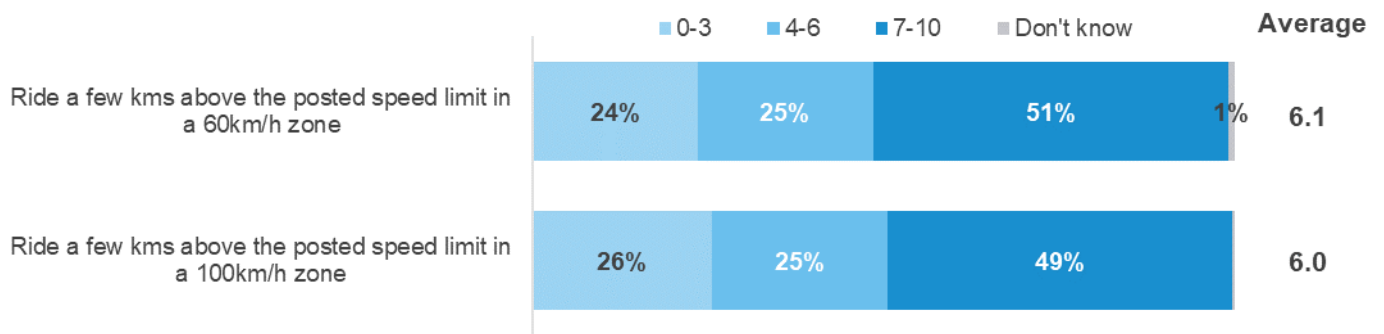
Active Riders were asked how dangerous they thought it was to ride a few kilometres above the posted speed limit, using a 0 to 10 scale where 0 was 'not at all dangerous' and 10 was 'extremely dangerous'.

As shown in Figure 33, just over half (51%) of Active Riders rate riding a few kilometres above the posted speed limit in a 60 km/h zone as dangerous (defined as a rating of 7 to 10 on the 11-point scale). The perception of danger for a 100 km/h speed limit zone is similar, with about half (49%) considering exceeding the speed limit dangerous.

Close to a quarter of Active Riders (24% for 60km/h and 26% for 100km/h) did not perceive riding a few kilometres over the speed limit as dangerous (0 to 3 on the 11-point scale).

Other analysis shows that females are more likely than males to rate riding above the posted speed as dangerous for 100 km/h zones (68% vs 45%) and 60 km/h zones (65% vs 48%). Those aged 40 and over are more likely than younger respondents to rate riding above the posted speed as dangerous in 60km/h zones (56% vs 39% among those aged under 40).

Figure 33 Perception of danger associated with riding a few km/h over the speed limit



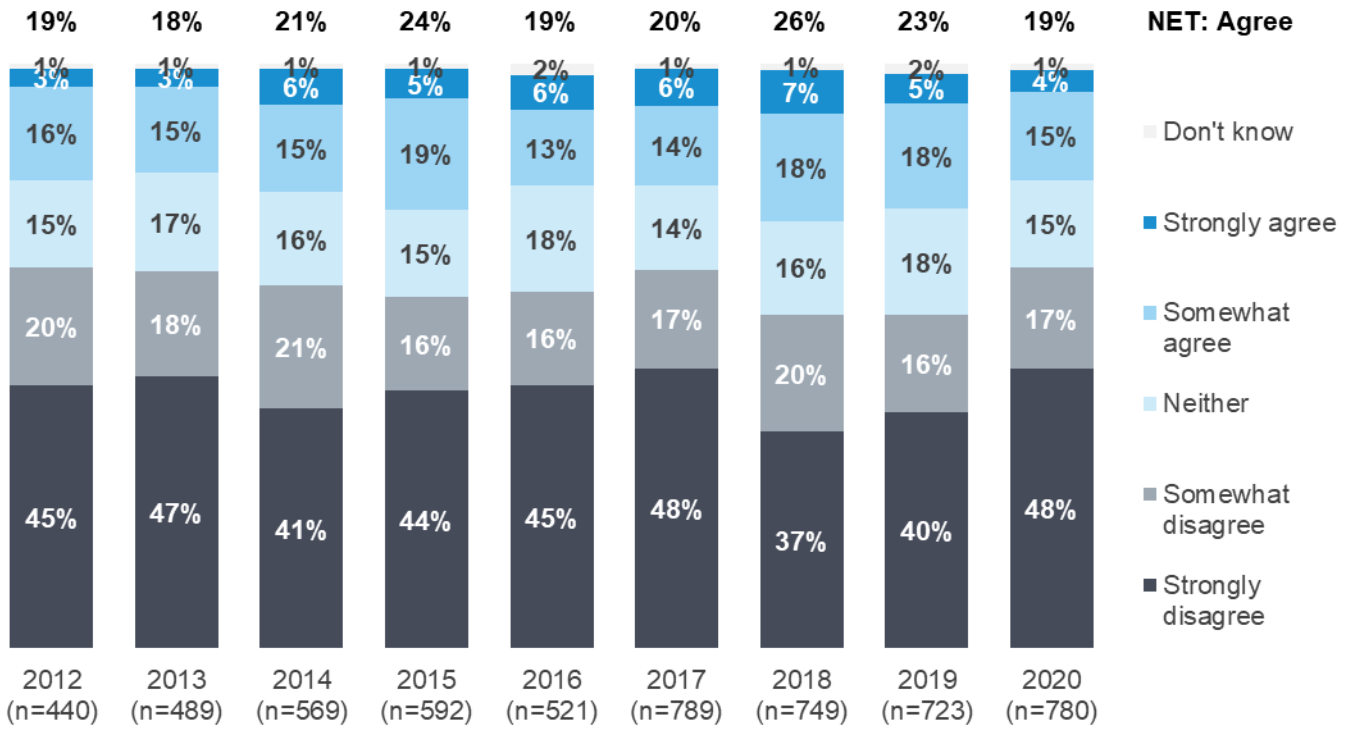
DAN1 & DAN2. - Using a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to... Active riders only; Weighted; 2020 base n=698 Figures may not add to 100% due to rounding

Preference to ride over the speed limit

Respondents who have ridden in the last 12 months were asked to what extent they agreed with the statement 'I ride over the speed limit if I'm sure I'll get away with it'.

As shown in Figure 34 one-in-five (19%) agree or strongly agree with this statement. The percentage who disagree increased from just over half (57%) in 2019 to around two-thirds in 2020 (65%).

Figure 34 Level of agreement with 'I ride over the speed limit...' statement (2012 – 2020)



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. Figures may not add to 100% due to rounding.

As shown in Table 18, females are less likely to show a preference for speeding than males, with the percentage of females disagreeing with the statement 'I ride over the speed limit if I'm sure I'll get away with it' higher than males (82% v 61%).

Table 18 Agreement with 'I ride over the speed limit...' statement by demographic

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Agree	19	20	14	18	19	19	18	18	24
NET: Disagree	65	61 ↓	82 ↑	69	69	63	66	66	61
Strongly agree	4	3	5	4	3	4	3	4	6
Somewhat agree	15	17	9	14	16	15	15	14	19
Neither	15	17 ↑	4 ↓	12	11	17 ↑	14	16	14
Somewhat disagree	17	17	16	25 ↑	21	15 ↓	18	17	12
Strongly disagree	48	44 ↓	65 ↑	44	48	48	47	49	49
Don't know	1	1	0	1	1	1	2	0	0
<i>Column n</i>	<i>780</i>	<i>645</i>	<i>135</i>	<i>157</i>	<i>192</i>	<i>431</i>	<i>432</i>	<i>224</i>	<i>124</i>

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; Base n=780

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

Figures may not add to 100% due to rounding

As shown in Table 19, owners of motorcycles with a capacity of 701cc or larger have a higher level of agreement (25%) towards the statement 'I ride over the speed limit if I'm sure I'll get away with it' by engine capacity of motorcycle owned, while owners of motorcycles with a capacity of 250cc or smaller have a lower level of agreement (12%). The opposite can be seen when looking at levels of disagreement.

Table 19 Agreement with 'I ride over the speed limit...' statement by engine capacity

Column %	Total	Number of motorcycles kept at home			Engine capacity of main motorcycle		
		None	One	Two or more	250cc or smaller	251-700cc	701cc or larger
NET: Agree	19	12	25	18	12 ↓	18	25 ↑
NET: Disagree	65	79 ↑	60	63	78 ↑	65	54 ↓
Strongly agree	4	3	4	2	2	2	6 ↑
Somewhat agree	15	9	20	16	11	16	19
Neither	15	5 ↓	15	17	9 ↓	16	19
Somewhat disagree	17	16	22	14	20	19	15
Strongly disagree	48	63 ↑	38 ↓	48	58 ↑	47	39 ↓
Don't know	1	4	0	2	0	1	2
<i>Column n</i>	<i>780</i>	<i>53</i>	<i>161</i>	<i>183</i>	<i>158</i>	<i>302</i>	<i>259</i>

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; Base n=780

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

Figures may not add to 100% due to rounding

3.6 Impaired riding

This section presents findings regarding drinking alcohol prior to riding behaviour and the perception of the level of danger associated with riding over the legal BAC.

3.6.1 Riding under and over the legal BAC

Table 20 shows the percentage of Active Riders who drink alcohol and have ridden in the past year while over the legal BAC, and the percentage who have ridden after drinking, but when they thought or knew they were under the legal BAC.

A small minority of Active Riders who drink alcohol (2%) said that they had ridden their motorcycle when they knew or thought they were over the legal BAC.

A greater proportion of Active Riders who drink alcohol (24%) indicate they had ridden a motorcycle after drinking alcohol when they knew or thought they were under the blood alcohol limit. This is a similar percentage to that reported in 2019 (28%).

Among Active Riders who drink alcohol, males (3%) were more likely than females (0%) to have ridden a motorcycle when they knew or thought they were over their legal blood alcohol limit. Those aged under 40 years were also more likely to have engaged in this behaviour (3% of those aged 18-25 and 6% of those aged 26-39 versus 1% of those aged 40 and over).

Continuing to consider Active Riders who drink alcohol, males (28%) were also more likely to have ridden a motorcycle when they knew or thought they were under their legal blood alcohol limit compared to females (9%).

Table 20 Percentage of Active Riders who drink alcohol and ride after drinking

Column %	Total	Gender		Age group			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
When you knew or thought you were over your legal blood alcohol limit, even slightly? (i.e. 0 or 0.05 BAC)	2	3	0	3	6 ↑	1 ↓	3	2	2
After drinking alcohol when you knew or thought you were under the legal blood alcohol limit	24	28 ↑	9 ↓	15	30	23	25	24	22
Column n	597	493	104	118	143	336	317	178	102

ALCA. - 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)?

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

Filter: Active riders who drink alcohol; Weighted; base n=597

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

Figures may not add to 100% due to rounding

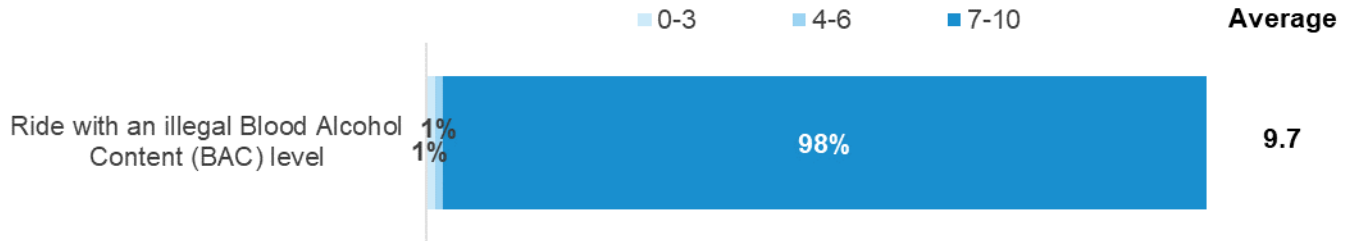
Considering riding after a number of alcoholic drinks

Over half of Active Riders who drink alcohol (50%) indicate that they would not have any drinks before riding, while one-in-four (25%) would have one drink and still consider riding, and a further one in five (22%) would have two drinks. Very few (3%) claim they would have three drinks or more and still consider riding.

3.6.2 Perception of danger associated with riding with an illegal BAC

Active Riders were asked to rate how dangerous it is to ride under the influence of alcohol. As shown in Figure 35, nearly all Active Riders (98%) provided a rating of seven or above (on a zero to 10 scale, where 10 is extremely dangerous) for the danger associated with riding with an illegal Blood Alcohol Content.

Figure 35 Perception of danger associated with riding under the influence



DAN3. - Using a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to ride with an illegal Blood Alcohol Content (BAC) level
Active riders only; Weighted; 2020 base n=697
Figures may not add to 100% due to rounding

3.7 Enforcement

This section covers expectations regarding enforcement tolerance for exceeding the speed limit, sentiment towards point-to-point speed cameras and engagement with police while riding.

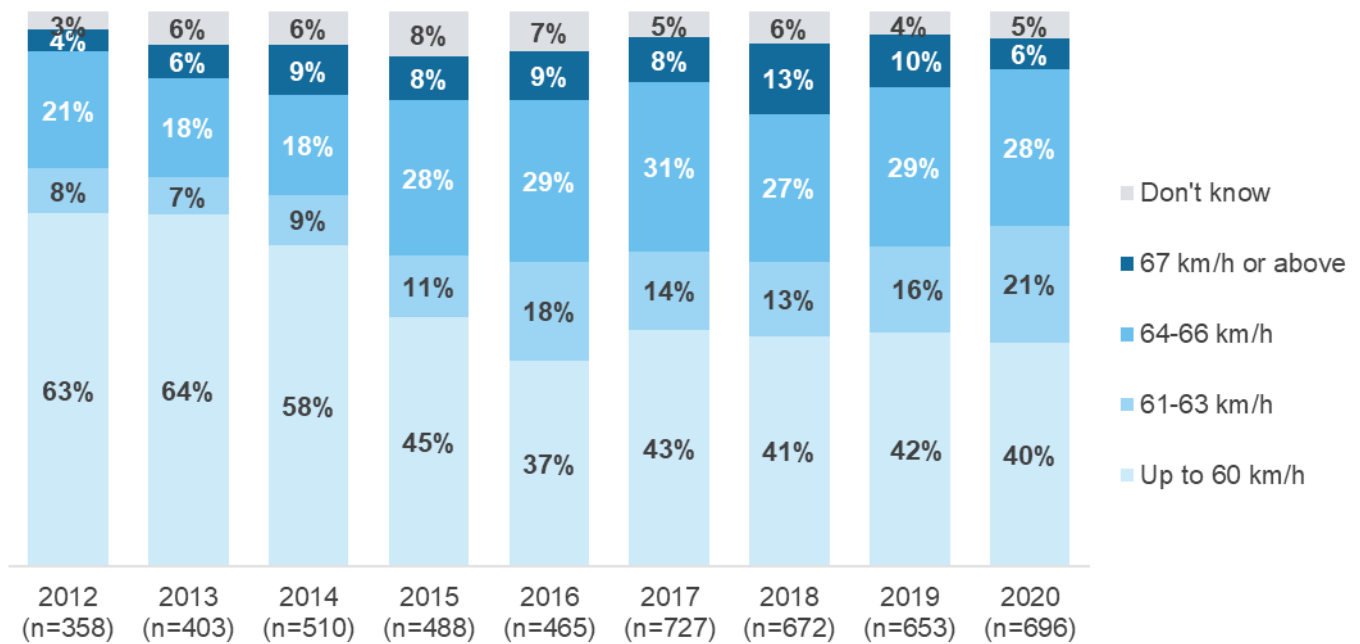
3.7.1 Attitudes towards enforcement of speed limits

Enforcement tolerance in 60 km/h speed limit zones

Figure 36 shows how the belief among Active Riders in a ‘zero tolerance’ approach² to speeding has declined from 63% in 2012 to 40% in 2020. The percentage who believe in a ‘zero tolerance’ approach has remained at about four-in-ten since 2016.

Over half of Active Riders (55%) say that people should be allowed to ride over a 60 km/h speed limit without being booked for speeding. One in twenty (6%) say that people should be allowed to ride at speeds of 67km/h or above.

Figure 36 Speed that should be allowed in a 60km/h zone (2012 – 2020)



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
 Figures may not add to 100% due to rounding

² i.e. a person should be booked even if they exceed the speed limit by only one km/h

Table 21 shows the speeds Active Riders say people should be allowed to ride over in a 60 km/h zone without being booked. Females (54%) are more likely than males (37%) to show belief in a 'zero tolerance' approach to speeding, as are active riders living in other urban areas (50%) compared to those living in major urban areas (33%). Males are more likely to nominate a speed of 67km/h or higher (7% vs 0% of females).

Table 21 Speed that should be allowed in a 60km/h by demographic

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Up to 60 km/h	40	37 ↓	54 ↑	30 ↓	31 ↓	45 ↑	33 ↓	50 ↑	46
61-63 km/h	21	21	21	29	24	19	24	16	20
61-66 km/h	28	30	23	27	37 ↑	26 ↓	31	25	25
67 km/h or above	6	7 ↑	0 ↓	7	6	5	7	3	6
Don't know	5	5	2	7	2	5	5	5	3
Column n	696	577	119	142	156	398	379	204	113

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; base n=696

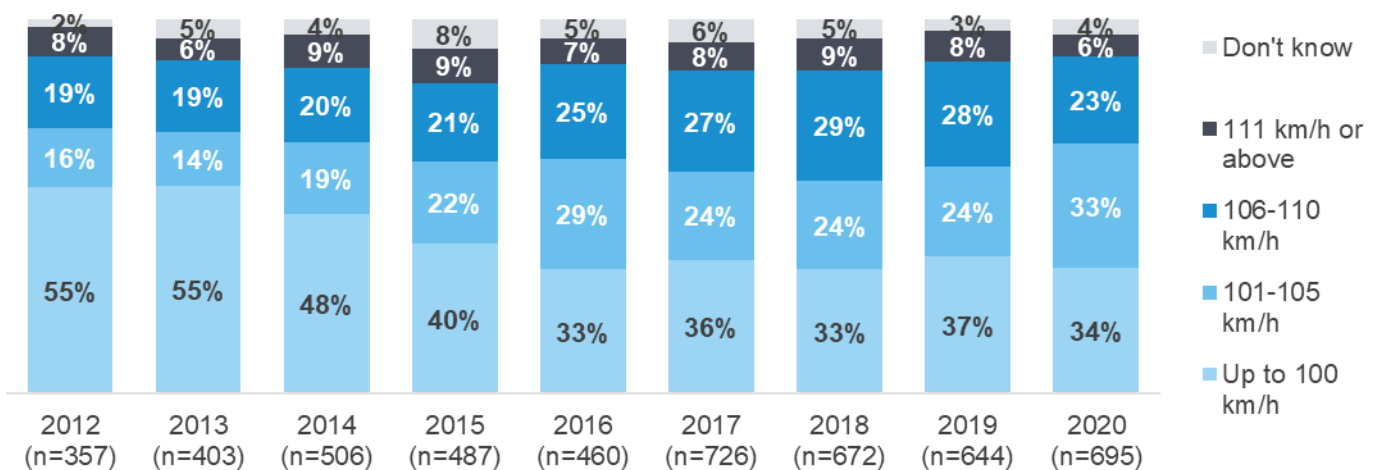
↓ ↑ Indicates statistically significant difference compared to respondents not in that category

Figures may not add to 100% due to rounding

Enforcement tolerance in 100 km/h speed limit zones

Active Riders were also asked at what speed they think people should be allowed to ride in a 100 km/h zone without being booked for speeding. As shown in Figure 37, there has been relatively little change over the last five years (since 2016). This follows a downward trend from 2012 to 2016 where the percentage of riders saying that people should only be allowed to ride up to 100 km/h in a 100 km/h zone without being booked steadily decreased. While the percentage talking a 'zero tolerance' approach remains low compared to pre-2016, the percentage of Active Riders who say that people should be allowed to ride at 101-105km/h increased from 24% in 2019 to 33% in 2020 while the percentage saying 106-110 km/h declined from 28% in 2019 to 23% in 2020.

Figure 37 Speed that should be allowed in a 100 km/h zone (2012 – 2020)



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

Excludes respondent error

Figures may not add to 100% due to rounding

As shown in Table 22, females (51%) are more likely than males (30%) to show belief in a ‘zero tolerance’ approach to speeding in a 100 km/h zone, and males are more likely to nominate a speed of 106 km/h or higher that people should be allowed to ride in a 100 km/h zone without being booked (33% vs 11% of females).

Table 22 Speed that should be allowed in a 100km/h zone by demographic

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Up to 100 km/h	34	30 ↓	51 ↑	30	26 ↓	37 ↑	30	38	38
101-105 km/h	33	32	36	47 ↑	38	30 ↓	39 ↑	25 ↓	27
106-110 km/h	23	26 ↑	10 ↓	12 ↓	25	24	23	25	22
111 km/h or above	6	7 ↑	1 ↓	3	7	5	5	7	8
Don't know	4	5	2	7	4	4	4	5	5
Column n	695	576	119	142	156	397	379	203	113

SPE4 - How fast should people be allowed to ride a motorcycle in a 100km/h zone without being booked for speeding?
 Weighted; 2020 base n=695
 ↓↑ Indicates statistically significant difference compared to respondents not in that category
 Excluding respondent error
 Figures may not add to 100% due to rounding

3.7.2 Point-to-point speed cameras

Active Riders were asked about how they felt about point-to-point speed cameras being used on main roads. As shown in Table 23, while 30% approve, 39% do not approve, and 31% either did not care or were uncertain. Those aged 18-25 are significantly more likely not to care either way (54%).

Table 23 Approval of point-to-point speed cameras

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
NET: Approve	30	32	20	17	39	28	32	31	21
Do not care either way	30	31	29	54 ↑	11 ↓	33	31	28	30
NET: Disapprove	39	37	47	25	46	38	37	41	41
Don't know	1	1	4	4	3	0	0	0	8 ↑
Column n	191	159	32	38	41	112	96	61	34

POL2. - Thinking about point-to-point speed cameras, which measure the vehicle's average speed over a distance of several kilometres instead of at a single point. How do you feel about the use of point-to-point speed enforcement on main roads? Do you...
 Filter: Active riders; Weighted; 2019 base n=191
 ↓↑ Indicates statistically significant difference compared to respondents not in that category
 Figures may not add to 100% due to rounding

3.7.3 Frequency of being pulled over by police in the last 12 months

As shown in Table 24, about one in six Active Riders (17%) have been pulled over by police in the last 12 months. Those aged 18-39 are more likely to have been pulled over by police compared to those aged 40 and older (20% vs 14%). Males are also more likely than females to be pulled over by police (19% vs 8%).

Table 24 Whether pulled over by police in last 12 months (2013 – 2020)

Column %	2013	2014	2015	2016	2017	2018	2019	2020
Yes	20	16	18	13	16	17	14	17
No	80	82	81	86	83	83	85	83
Don't know / Refused	0	1	2	1	1	1	1	0
Column n	506	404	486	467	727	675	647	697

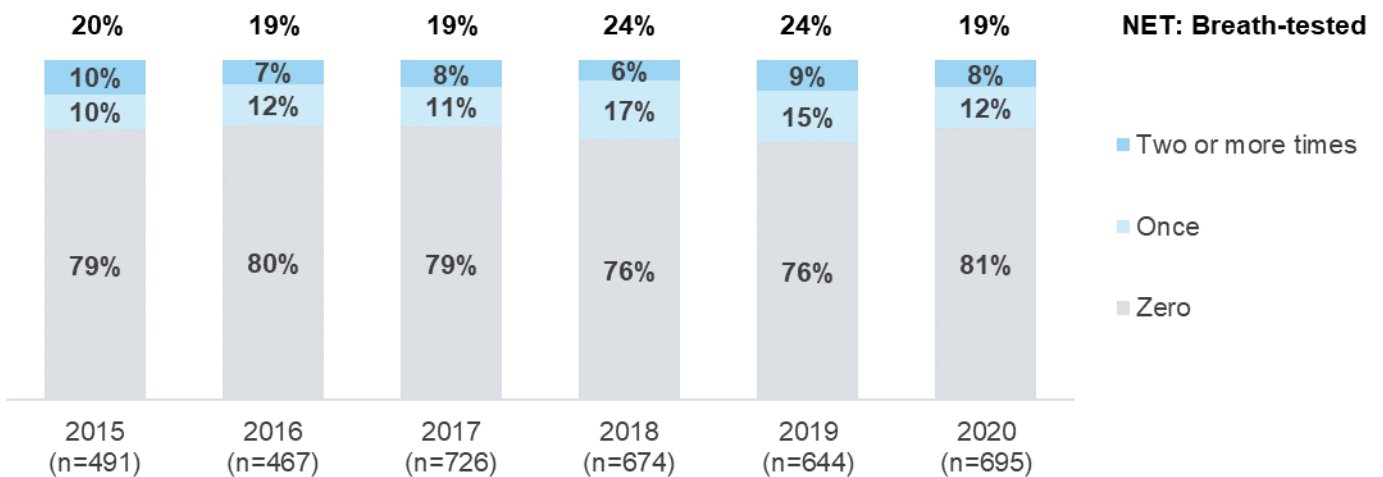
POL1. - Have you been pulled over by police for any reason while riding your motorcycle in the last 12 months?
 Filter: Active riders; Weighted; 2012 base n=359; 2013 base n=506; 2014 base n=404; 2015 base n=486; 2016 base n=467; 2017 base n=725; 2018 base n=675; 2019 base n=647; 2020 base n=697
 ↓↑ Indicates statistically significant differences between 2019 and 2020 only
 Figures may not add to 100% due to rounding

3.7.4 Random Breath and Drug Testing

As shown in Figure 38, one in five (19%) Active Riders had been breath tested when riding their motorcycle in the past 12 months – the same percentage as 2017 (19%) and lower than 2018 and 2019 (both 24%).

Other analysis shows that a smaller percentage of Active Riders had been randomly drug tested in the last 12 months (4%). This is a similar percentage to 2019 (5%) and 2018/ (4%), but a greater percentage than in 2016 (less than 1%) and 2015 (2%).

Figure 38 Percentage of Active Riders who are breath tested (2015 – 2019)



POLB. - In the last 12 months, how many times, if any have you been breath-tested when riding your motorcycle
 Filter: Active riders; Weighted; 2020 base n=695

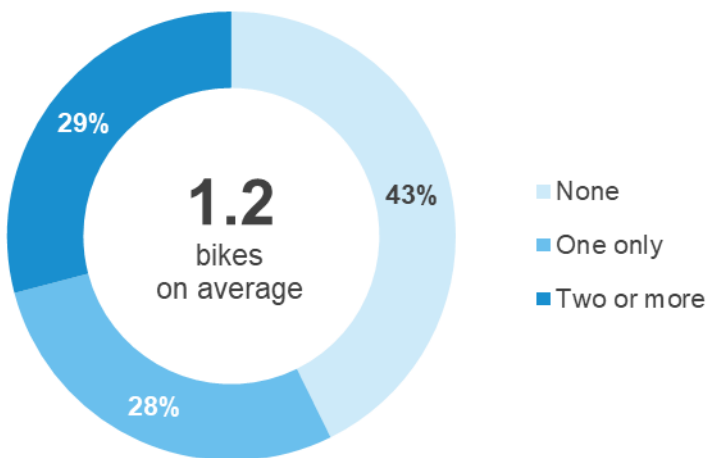
3.8 Motorcycle/Scooter Ownership

This section presents findings relating to the type of motorcycles respondents had at home, and respondents' awareness, desire for and possession of various safety features.

3.8.1 Number of motorcycles in household

As shown in Figure 39, among all respondents, around two in five (43%) do not have a motorcycle at home, while 28% have one motorcycle, and 29% have two or more motorcycles

Figure 39 Number of motorcycles kept at home – 2020



H1A/B. - How many motorcycles are kept at your home, regardless of who owns them or registration status?
 Total sample; Weighted; Base n=506
 Figures may not add to 100% due to rounding

As shown in Table 25, Active Riders (89%) are more likely to have a motorcycle at home than Lapsed or Former Riders. One in five Lapsed Riders (21%) and one-in-ten (11%) Former Riders have a motorcycle at home.

Table 25 Number of motorcycles kept at home by rider activity segment

Column %	Total	Active riders	Lapsed riders	Former riders
None	43	14 ↓	79 ↑	89
NET: Any motorcycles	57	86	21	11
One	28	41 ↑	13 ↓	6
Two or more	29	46 ↑	8 ↓	5
Average	1.2	1.9 ↑	0.3 ↓	0.2
Column n	506	360	121	25

H1A/B. - How many motorcycles are kept at your home address?
 All respondents; Weighted sample; Base n=506
 ↓↑ Indicates statistically significant difference compared to respondents not in that category
 Figures may not add to 100% due to rounding

3.8.2 Details of motorcycle ridden most often

Respondents were asked about the type of motorcycle they ride and its engine capacity.

Main motorcycle type

As shown Table 26, Active Riders are most likely to ride either cruisers (mentioned by 27%), off road bikes/trail bikes (21%), sports bikes (19%) or sports tourers (12%).

There are several differences by demographic, including:

- Females are more likely to ride scooters (19% vs 6% among males)
- Those aged 40 or over are less likely to ride sports bikes (13% vs 33% among those aged under 40), but more likely to ride cruisers (31% vs 18%) or sports tourers (16% vs 5%)
- Those in Major Urban areas:
 - Were more likely to ride scooters (12% vs 5% in other areas) or sports bikes (24% vs 13%)
 - But less likely to ride off road bikes/trail bikes (15% vs 27%)

Table 26 Main motorcycle type by selected rider characteristics

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Cruiser	27	26	32	17 ↓	18 ↓	31 ↑	25	30	26
Off road bike/trail bike	21	21	18	27	28 ↑	17 ↓	15 ↓	23	36 ↑
Sports bike	19	20	15	34 ↑	32 ↑	13 ↓	24 ↑	12 ↓	17
Sports tourer	12	14	6	2 ↓	5 ↓	16 ↑	13	15	6 ↓
Dual sport	5	5	5	5	3	6	4	6	6
Scooter	9	6 ↓	19 ↑	4	6	10	12 ↑	6	5
Other road bike	3	4	2	5	4	3	4	3	2
Other	3	3	3	5	3	3	2	5	3
Column n	689	570	119	141	156	392	371	208	110

MC1. - Thinking about the one motorcycle you ride most often. What type of motorcycle is it?
 Filter: Base: Active rider ; Weighted sample; base n=689
 Figures may not add to 100% due to rounding

Engine size of main motorcycle

As shown in Table 27, motorcycles that are ridden most often by Active Riders are most likely to have engine sizes of 701cc and over (42%) ahead of those with a reported engine size of 251-700cc (36%) and those with a reported engine size of up to 250cc (21%).

Those with the more powerful 701cc and over engines are significantly more likely to be aged 40 and over (51% vs 4% of 18-25 year olds and 24% of 26-39 year olds).

Table 27 Engine size of main motorcycle by selected rider characteristics

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Up to 250cc	21	17 ↓	36 ↑	33 ↑	22	19	18	22	29
251-700cc	36	36	38	64 ↑	53 ↑	28 ↓	41 ↑	28 ↓	37
701cc and over	42	46 ↑	25 ↓	4 ↓	24 ↓	51 ↑	40	49 ↑	33
Don't know	1	1	1	0	1	1	2	1	1
Column n	696	575	121	142	157	397	373	210	113

MC5 - What capacity is the engine?

Filter: Active riders; Weighted sample; Base n=696

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

Figures may not add to 100% due to rounding

As shown in Table 28, Off-road Riders are the least likely to have engine sizes of 701+cc (28%).

Table 28 Engine size of main motorcycle by rider purpose

Column %	Total	Type of rider		
		Commuter	Recreational	Off-road
Up to 250cc	21	21	17 ↓	23
251-700cc	36	39	34	48 ↑
701cc and over	42	39	47 ↑	28 ↓
Don't know	1	1	1	1
Column n	696	427	567	280

MC5 - What capacity is the engine?

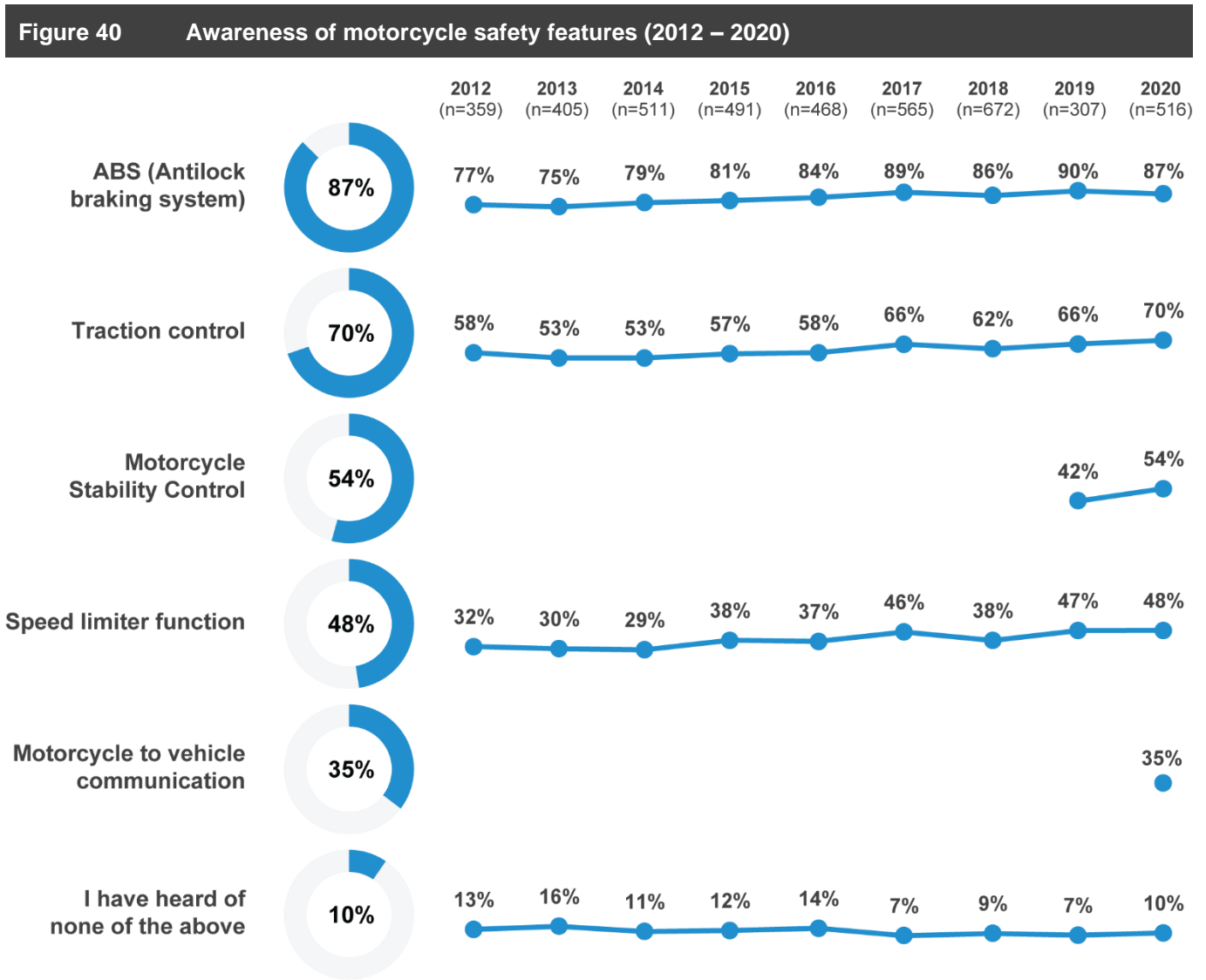
Filter: Active riders; Weighted sample; Base n=696

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

Figures may not add to 100% due to rounding

3.8.3 Awareness of motorcycle safety features

Active Riders were asked whether they had heard of a number of safety features currently available on some motorcycles and/or clothing. As shown in Figure 40, the most common features respondents had heard of were ABS (87%) and traction control (70%). In 2020 there was a significant increase in awareness of Motorcycle Stability Control (54% from 42% in 2019).



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

Motorcycle safety features desired for next motorcycle

Active Riders, whose most ridden motorcycle is for road use, were asked which of the safety features they were aware of in the previous question (Figure 40) they would want for their next motorcycle.

As shown in Table 29, the most common features Active Riders would like on their next motorcycle are ABS (83%) and traction control (58%), the same as 2019. This was followed by and motorcycle stability control (55%) and Motorcycle to vehicle communication (29%). In 2020 Active Riders were not asked about motorcycle blind spot warning sensor, or low tyre pressure indicators. Motorcycle to vehicle communication was a new safety feature included in 2020.

Active Riders, whose most ridden motorcycle is for road use, were asked if they had a number of safety features currently available on some motorcycles and/or clothing on the motorcycle they currently ride most often. These safety features were the same used in the previous two questions.

Four-in-ten (42%) have none of these features on their current road bike. The most common features Active Riders do have on their motorcycle are ABS (50%), traction control (21%) and Motorcycle Stability Control (14%). There is a notable gap in the presence of features on current motorcycles and the desire to have these features on a new motorcycle.

Table 29 Awareness, desire for and possession of motorcycle safety features

Column %	Aware of the feature	Would like to have on next bike	Have feature on current bike
ABS (Anti-lock braking system)	87	83	50
Traction control	70	58	21
Motorcycle Stability Control	54 ↑	55	14
Speed limiter function	48	18	7
Motorcycle to vehicle communication	35	29	6
My bike has none of these features	-	-	42
I don't want any of these features on my next bike	-	10	-
I have heard of none of these features	10	-	-
<i>Column n</i>	516	342	341

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

FEA3 - Which of these safety features would you want for your next motorcycle?

FEA2 - Which of these safety features do you have on the road motorbike you ride most often?

Filter: Active riders whose most ridden motorcycle is for road use. Weighted sample

3.9 Motorcycle Clothing

This section presents findings relating to wearing protective motorcycle gear when riding a motorcycle, the type of helmet worn, and attitudes towards motorcycle safety clothing.

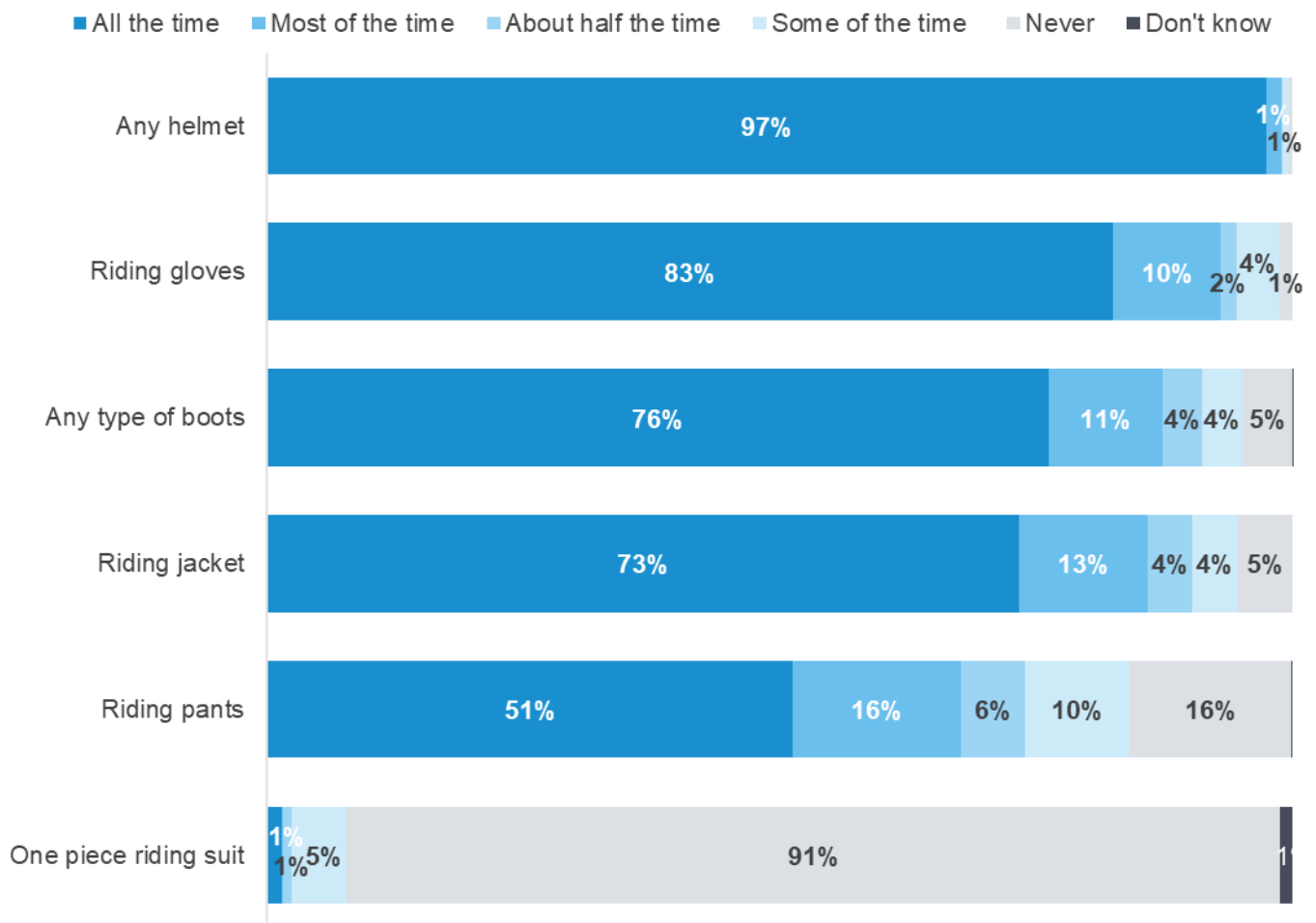
Protective gear usage

Active Riders were asked how often they wore protective gear when riding a motorcycle. As shown in Figure 41, a majority wear the following gear all the time: any helmet (97%), motorcycle riding gloves (83%), any type of boots (76%), a motorcycle riding jacket (73%). About half (51%) of Active Riders wear motorcycle riding pants all the time.

Filtering these results to the last three years (2018-2020) to enable sufficient sample size shows that females are more likely than males to wear the following protective clothing 'all the time': riding gloves (88% vs 77%) and a riding jacket (76% vs 68%).

Active Riders from Major Urban areas are also more likely to wear these three items 'all the time': riding gloves (81% vs 75% among those from other locations), a riding jacket (73% vs 63%) and any helmet (98% vs 95%).

Figure 41 Usage of protective motorcycle clothing



MS1-6. - When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
 Filter: Active riders; Weighted sample; 2019 Base n=631-647
 Figures may not add to 100% due to rounding

As shown in Table 30, on average, Active Riders wore 3.8 pieces of protective clothing ‘all the time’. About four in ten (44%) wear five or more items ‘all the time’ and a further one in five (22%) wear four items ‘all the time’. Females wear more items ‘all the time’ on average than males (3.9 items vs 3.6).

Active Riders who ride a motorcycle with a 250cc or lower capacity engine wear a lower number of protective items ‘all the time’ compared to Active Riders who ride motorcycles with an engine capacity of more than 250cc (3.2 vs 4.0).

Table 30 Number of items worn all the time when riding

Column %	2017	2018	2019	2020
No items are worn all the time	2	5	2	1
1 item	10	10	10	6
2 items	12	12	13	12
3 items	17	19	15	15
4 items	20	18	22	22
5 or more items	40	37	38	44
Average	3.8	3.5	3.6	3.8
Column n	728	677	647	698

MS - When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
 Filter: Active riders only; Weighted sample; 2019 Base n=647
 Figures may not add to 100% due to rounding

As shown in Table 31 Active Riders wore 4.3 pieces of protective clothing ‘all or most of the time’, an increase from 2019 (4.2).

Active Riders who ride a motorcycle with a 250cc or lower capacity engine wear a lower number of protective items ‘all or most of the time’ compared to Active Riders who ride motorcycles with an engine capacity of more than 250cc (3.9 vs 4.5).

Table 31 Number of items worn all the time or most of the time when riding

Column %	2017	2018	2019	2020
No items are worn all the time	1	0	0	0
1 item	3	4	4	3
2 items	5	5	8	5
3 items	12	13	11	11
4 items	20	24	22	19
5 or more items	59	53	55	62 ↑
Average	4.4	4.2 ↓	4.2	4.3 ↑
Column n	728	677	647	698

MS - When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
 Filter: Active riders only; Weighted sample; 2019 Base n=647
 ↓↑ Indicates statistically significant difference compared to respondents not in that category
 Figures may not add to 100% due to rounding

Type of helmet used

As shown in Table 32, Active Riders were asked what type of motorcycle helmet they wear when riding a motorcycle. The majority wear a full-faced helmet all the time (71%), while smaller percentages wear both types of helmets (19%) or an open-faced helmet all of the time (10%).

Active Riders who ride a cruiser type of motorcycle were least likely to wear a full-faced helmet (46%), with riders of this type of motorcycle more likely to wear an open-faced helmet (24%) or both types of helmet (30%).

Active riders aged over 40 years (66%) and those living in Rural Balance areas (60%) are least likely to wear a full-face helmet 'all the time'.

About half of Active Riders who ride a scooter wear a full-faced helmet (51%), with the remainder either wearing an open-faced helmet (28%) or both types of helmet (20%).

Table 32 Type of helmet used

Column %	Total	Gender		Age			Location		
		Male	Female	18 - 25	26 - 39	40+	Major Urban	Other Urban	Rural Balance
Wear full face helmet all the time	71	71	70	88 ↑	82 ↑	66 ↓	75 ↑	67	60 ↓
Wear open face helmet all the time	10	10	10	5	6 ↓	12 ↑	9	9	19 ↑
Both, wear an open face helmet some of the time and a full face helmet some of the time	19	19	19	7 ↓	13	22 ↑	16 ↓	24	21
Column n	693	575	118	143	155	395	379	205	109

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?
 Filter: Active riders; Weighted sample; 2019 Base n=308
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category
 Figures may not add to 100% due to rounding

Attitude statement about motorcycle safety clothing

Respondents who have ridden in the last 12 months were asked to what extent they agreed 'I think motorcyclists should always wear motorcycle clothing'. As shown in Figure 42, about nine in ten (88%) agree with this statement compared to 2019 where 82% agreed.

Figure 42 Agreement that motorcyclists should always wear protective clothing

■ Strongly agree ■ Somewhat agree ■ Neither ■ Somewhat disagree ■ Strongly disagree



AT11. - 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=722
 Figures may not add to 100% due to rounding

3.10 Motorcycle Crash History

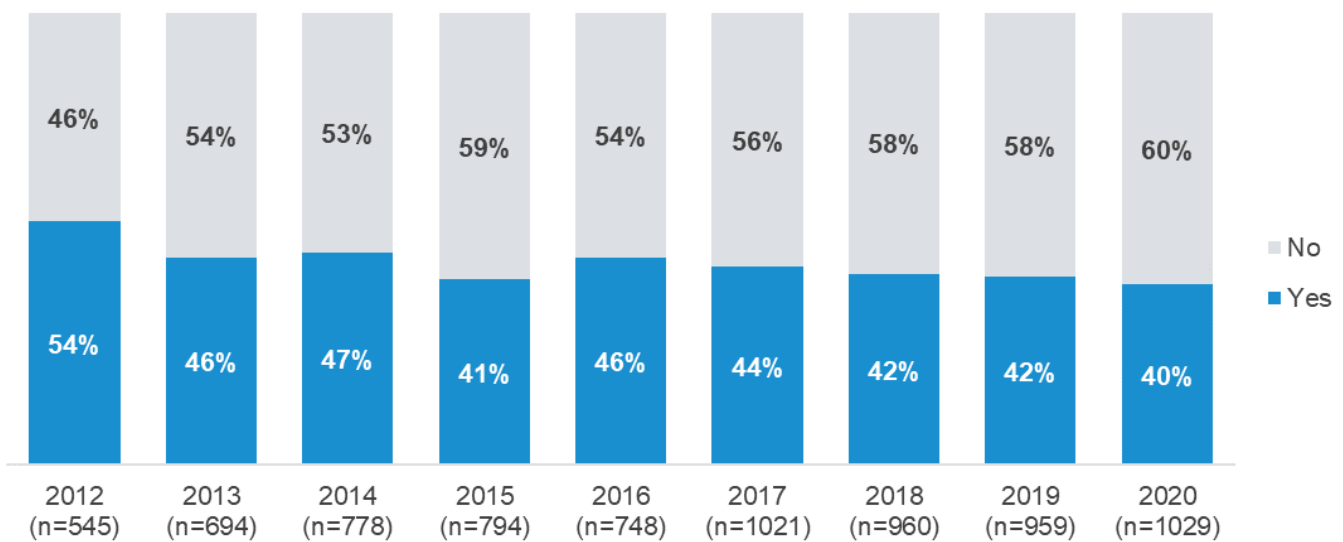
Respondents were asked whether they had crashed while riding a motorcycle, whether they had required medical treatment after their most recent crash, and whether they had received assistance after a crash.

Crash history

Respondents were asked whether they had ever crashed while riding a motorcycle, excluding dropping their bike while stationary and not including any crashes that may have occurred during motorcycle sport. As shown in Figure 43, among total respondents, under half (40%) indicate that they ever had a crash.

Males are more likely to have had a crash than females (44% vs 25%). Respondents aged 40 years and older were also more likely to have a crash compared to those under 40 (34% vs 42%).

Figure 43 Motorcycle crash history (2012 – 2020)



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
 Figures may not add to 100% due to rounding

Crashes requiring medical treatment

As shown in Table 33, just over half of respondents (54%) who have had a crash required medical treatment as a result. Please note this was only asked in the first two quarters of 2020.

Table 33 Most recent crash requiring medical treatment (2012 – 2020)

Column %	2012	2013	2014	2015	2016	2017	2018	2019	2020
Required medical treatment as a result of crash	45	49	50	48	48	48	54	47	54
Column n	220	116	139	241	324	446	416	386	209

CRA2 - Have you required medical treatment as a result of any motorcycle accident?
 Filter: Ever experienced crash; Weighted sample; 2012 base n=220; 2013 base n=116; 2014 base n=139; 2015 base n=241; 2016 base n=324; 2017 base n=446; 2018 base n=416, 2019 base n=386, 2020 base n=209
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category
 Filter: Required medical treatment

Receiving assistance after crashing

Respondents who have had a crash while riding a motorcycle were asked if they received assistance from someone they were riding with. As shown in Table 34, more than a third had received assistance after a crash (36%).

Recreational Riders are more likely to have received assistance (45%) than those who are not recreational motorcyclists. A similar percentage of Commuters (44%) received assistance while Off-road Riders (40%) were less likely to have received assistance.

Table 34 Receiving assistance after crashing

Column %	Total	Rider Activity Segments			Type of rider		
		Active riders	Lapsed riders	Former riders	Commuter	Recreational	Off-road
Yes	36	40	23	45	44	45 ↑	40
No	64	60	77	55	56	55 ↓	60
Column n	206	160	37	9	102	141	73

CRA9. - Have you ever received assistance from someone you were riding with after crashing your motorcycle?
 Filter: Ever experienced crash; Weighted sample; Base n=206
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category

As shown in Table 35, respondents who had been assisted were asked how important the assistance was in their recovery. Just over half (51%) indicated the assistance was very important for their recovery, while 13% indicated that it was not at all important. Despite being less likely to receive assistance, Off-road Riders (50%) are more likely to indicate the assistance was moderately important than Recreational Riders (35%).

Table 35 Importance of assistance for recovery

Column %	Total	Rider Activity Segments			Type of rider		
		Active riders	Lapsed riders	Former riders	Commuter	Recreational	Off-road
Very important	51	55	39	40	59	54	37
Moderately important	32	35	23	28	38	35	50 ↑
Not at all important	13	4	38	31	1 ↓	4	10
Don't know	5	7	0	0	2	7	2
Column n	79	66	9	4	42	62	30

CRA10 - How important was that assistance in your recovery?
 Filter: Ever experienced crash and received assistance; Weighted sample; Base n=79
 ↓ ↑ Indicates statistically significant difference compared to respondents not in that category

3.11 Improving Rider Safety

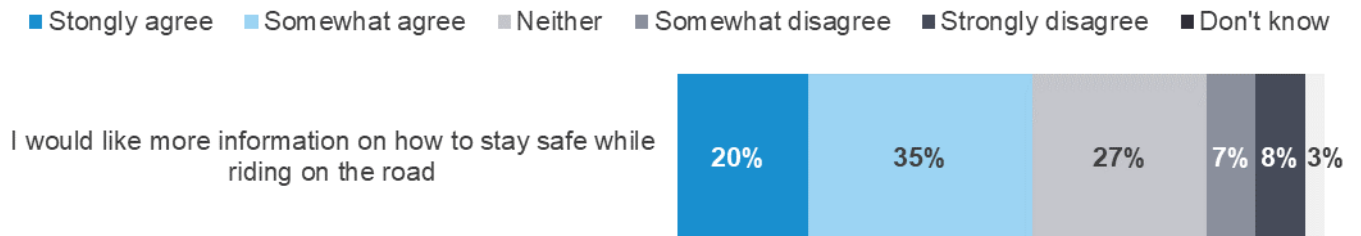
This section presents findings relating to the desire to find out more about being a safe motorcyclists and respondent suggestions to improve motorcyclist safety.

Information on how to stay safe

Respondents who have ridden in the last 12 months were asked whether they agreed or disagreed with the statement 'I would like more information on how to stay safe while riding on the road'. As shown in Figure 44, over half of respondents (55%) somewhat agreed or strongly agreed with this statement, while only 15% somewhat disagreed or strongly disagreed.

Commuters were more likely to strongly disagree or somewhat disagree (13%) that they would like more information on how to stay safe while riding, whereas Reactional Riders were more likely to somewhat agree (37%) with this statement.

Figure 44 Information on how to stay safe riding on the road



ATM - To what extent do you agree or disagree with the following statement... I would like more information on how to stay safe while riding on the road?

Filter: Ridden in the past 12 months; Weighted sample; base n=784

Respondent suggestions for improving rider safety

All respondents were asked (unprompted) if they would like to make any suggestions about what the TAC could do to improve rider safety. As shown on the following page in Table 36, the most common themes related to safety 'being up to the individual/riders are responsible for their own actions/none' (23%), followed by 'improve road user awareness/ education'. This remains unchanged from 2019.

In 2020 there was a significant increase in the percentage mentioning 'maintain the roads/fix defects/remove pot holes/clean up after road works' (7%) compared to 2019 (5%). Notably, the percentage mentioning 'remove wire rope/crash barriers' decreased significantly between 2019 and 2020 (from 6% to 4%).

Table 36 Suggestions to improve rider safety (2017 – 2020)

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

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

Total Sample Weighted; Base 2020 n=1,037

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

4 Summary of findings

Travelling habits

Apart from driving or riding themselves, respondents who have a motorcycle licence and/or a motorcycle registered in their name ('total respondents') are most likely to get around on a regular basis by walking (with 41% travelling this way more than once a week) or as passengers on a motorcycle or car (32%). Fewer than 1 in 10 (9%) catch public transport more than once a week and just 1% take a taxi or similar more than once a week.

Most of these same respondents (92%) drive a car more than once a week, which is substantially higher in prevalence than the likelihood of riding their motorcycle more than once per week (15%).

Learning to ride

The large majority of total respondents have a full licence (91%), although this varies significantly by age, with 35% of respondents aged 18-25 having a full licence compared to 90% of those aged 26-39 and 94% of those aged 40 and over.

More than six in ten (61%) of full and probationary licence holders got their licence between the ages of 18 and 25, while 21% got their full licence between the ages of 26 and 39, and 12% got it aged 40 and over.

Skills and training

Just under half (47%) of respondents believe that compared to the average rider on Victorian roads they are a 'better rider' while just 6% believe they are a 'worse rider'.

Considering the extent to which riders brush up on their skills, seven-in-ten (69%) ever brush up on their skills while 31% never do. Riders aged 18-25 are most likely to brush up on their skills 'at least once a month' (48% vs 26% of older riders). The top three resources used to brush up on skills are 'friends or family' (48%), YouTube (37%) and a 'motorcycling website' (35%).

Three-quarters (74%) of motorcyclists have ever attended some motorcycle training. The main reason for attending motorcycle training is assistance in 'getting a learners permit or licence' (61%) followed by 'improving your road riding skills' (23%). Four-in-ten (42%) of those who had attended training did so in the last five years.

On balance respondents who had ridden in the last twelve months agree that people returning to riding after a break should undertake motorcycle training. In 2020, more than a half (53%) agree that people should undertake training, while 31% disagree.

Riding activity and attitudes

Close to two in three total respondents (66%) indicate they had ridden a motorcycle in the last 12 months, remaining stable from 2019 (66%). Those aged between 18 and 25 (92%) are significantly more likely to have ridden in the last 12 months than older respondents. Respondents on Learner or Probationary licences were also more likely (99%) to have ridden in the last 12 months compared to those who had a full licence (63%).

Similar to 2019, 57% of total respondents are either regular or occasional riders or have started riding again after a break. These respondents are defined as Active Riders. Over one third (34%) indicate that, although they had stopped riding, they might ride again in the future. These respondents are defined as Lapsed Riders. Those who had stopped riding and did not intend to return to riding comprise 9% of respondents. They are defined as Former Riders. Apart from no longer owning a motorcycle, the main reasons Former Riders give for ceasing riding are family commitments or a change in lifestyle (mentioned by 26%), too busy (12%) or that they prefer to use other transport (12%).

Those aged 18-25 (69%) and living in major urban areas (65%) are significantly more likely to be Active Riders.

Active Riders are more likely to ride recreationally on-road (79% of Active Riders do so) than commute (56%) or ride recreationally off-road (37%). Commuters are more likely to live in Major Urban areas (65%) than in Other Urban (45%) locations while, by contrast, Recreational Off-road Riders are less likely to live in Major Urban areas (31%) than in Rural Balance (54%) locations. On average, Commuters ride more per month (561km) than Recreational On-roader Riders (478km) or Recreational Off-road riders (380km).

Recreational Off-road Riders are more likely to ever ride in a group (86%) than Commuters (73%) or Recreational On-road Riders (74%). Active Riders were asked how often they ride in a group when riding for recreational purposes. A majority has ridden in a group at least some of the time (74%). Active Riders who ever ride in a group were asked whether riding in a group makes them less or more cautious or whether it makes no difference. Close to half (49%) indicate it makes no difference, while 45% claim they become more cautious and only 6% indicate they become less cautious. Active riders aged 40 years and older (50%) were more likely to say that riding in a group makes them more cautious.

The large majority of respondents who have ridden in the last 12 months (96%) agree that *'the only remedy for fatigue while riding is to stop riding and rest'*, with 83% 'strongly agreeing'. This percentage has remained stable since 2013, with only a slight decrease in 2019 to 79%.

Nearly all Active Riders (98%) rate riding with an illegal blood alcohol content level as highly dangerous (7-10 on a 0-10 point scale where 10 is extremely dangerous), and 94% indicate that riding while very drowsy is highly dangerous. A smaller, although still substantial percentage (81%), think *'taking your eyes off the road for two seconds while riding is highly dangerous'*.

Active riders were asked if they had ever talked on a mobile phone while riding and a majority said they had never done this (94%). However, those who had (6%) were significantly more likely to be respondents aged 18-25 years (11%).

While the majority of respondents who have ridden in the last 12 months (76%) agree that they *'never take unnecessary risks while riding'*, about one in eight (12%) disagree that they never take unnecessary risks. Those who disagreed were significantly more likely to be those aged 18-25 years (21%).

Attitudes towards speeding and speeding behaviour

Respondents who have ridden a motorcycle in the last 12 months were asked to what extent they agreed with the statement *'I ride over the speed limit if I'm sure I'll get away with it'*. One-in-five agree with this statement (19%).

Around two-in-five of respondents who have ridden a motorcycle in the last 12 months (39%) indicate they had intentionally ridden above the speed limit in a 60km/h zone in the last three months. A similar proportion of respondents who have ridden a motorcycle in the last 12 months (42%) indicate they had intentionally ridden above the speed limit in a 100km/h zone, in the last three months.

Over half of Active Riders (55%) believe they should be allowed to ride over the 60 km/h speed limit without being booked. The belief in a 'zero tolerance' approach to speeding (i.e. a person should be booked even if they exceed the speed limit by only one km/h) has declined from 63% in 2012 to 40% in 2020. Similarly, in recent years there has been a shift towards Active Riders believing there should be more leeway to ride over the speed limit in 100km/h zones. In 2012 and 2013 55% Active Riders believed there should be no leeway (i.e. up to 100km/h). This percentage declined to 34% in 2020.

Random breath and drug testing

One in five (19%) Active Riders had been breath tested when riding their motorcycle in the past 12 months in 2020, a slightly lower result than in 2018 (24%) and 2019 (24%), but similar to 2017 (19%). A smaller percentage had been randomly drug tested in the last 12 months (4%). This was a similar percentage to 2019 (5%) and remains stable from 2017 (4%) and 2018 (4%).

As was the case in 2019, only a small minority of Active Riders who (2%) indicate that they had ridden their motorcycle when they knew or thought they were possibly over the legal blood alcohol limit. A higher proportion of Active Riders said they had written a motorcycle when they knew or thought they were under the legal blood alcohol limit

Active Riders believe on average that it is more dangerous to ride under the influence of alcohol than to ride a few kms per hour above the posted speed limit. For example, while 97% of Active Riders believe it is dangerous to ride over the legal BAC level, only 43% think it dangerous to ride a few kms an hour over the 60 km/h speed limit.

Over half of Active Riders who drink alcohol (50%) indicate that they would not have any drinks before riding, while one-in-four (25%) would have one drink and still consider riding, and a further one in five (22%) would have two drinks. Very few (3%) claim they would have three drinks or more and still consider riding.

Motorcycle/scooter ownership

About two in five of total respondents (43%) do not have a motorcycle at home, while 28% have one motorcycle, and 29% have two or more motorcycles.

Active Riders are most likely ride either cruisers (mentioned by 27%), off road bikes/trail bikes (21%), and sports bikes (19%) or sports tourers (12%).

Motorcycles that are ridden most often by Active Riders are most likely to have engine sizes of 701+cc (42%) ahead of those with an engine size of 251-700cc (36%) or of 250cc (21%).

The most common safety features Active Riders whose most ridden motorcycle is for road use have on their motorcycle are ABS (50%), traction control (21%) and Motorcycle Stability Control (14%).

Protective motorcycle clothing

Active Riders were asked how often they wore protective gear when riding a motorcycle. A majority wear the following gear all the time: any helmet (97%), motorcycle riding gloves (83%), any type of boots (76%), a motorcycle riding jacket (73%). About half of respondents (51%) wear motorcycle riding pants all the time.

About seven-in-ten Active Riders (71%) wear a full-faced helmet all the time, while smaller percentages wear a full-faced helmet some of the time and an open-faced helmet some of the time (19%), or an open-faced helmet all of the time (10%).

Motorcycle crash history

As was the case in previous years, under half of total respondents (40%) indicated they had had a crash. Just over half of those having a crash required medical treatment (54%).

Slightly over a third of respondents who had ever experienced a crash had received assistance after a crash (36%). Recreational Riders are more likely to have received assistance (45%) than those who are not recreational riders. A similar percentage of Commuters (44%) received assistance while fewer Off-road Riders (40%) received assistance.

Respondents who had received assistance after a crash were asked how important this was to their recovery. Just over half (51%) indicated that the assistance was 'very important' to their recovery.

Suggestions for improving road safety

Over half (55%) of respondents who have ridden in the last 12 months agree that they would like more information on how to stay safe while riding on the road.

The most mentioned suggestions to improve road safety related to respondents believing riders are responsible for their own actions. However, improved education and training for both drivers and motorcyclists as well as continuing awareness advertising campaigns were also frequently mentioned as the best approach for improving rider safety.

When considering respondent suggestions for improving road safety, in 2020 there was a significant increase in suggestions mentioning road maintenance (7%) compared to 2017 to 2019 (5%). The percentage mentioning 'remove wire trip crash barriers' decreased significantly in 2020 (4%) from 2018 and 2019 (6%).

5 Methodology

Data Collection

The Motorcycle Monitor was conducted using a similar methodology in 2020 as since 2014, and was a multimode project, with respondents having the option to complete the survey in hard copy, over the telephone, or online. Since 2017 the survey has been run continuously, with data collected across four quarters in seven waves. Prior to this, the survey was run annually as a point-in-time survey.

The survey was conducted in two waves per quarter, except in the Oct-Dec quarter where one wave was conducted to accommodate the holiday season. All respondents were sent a Primary Approach Letter (PAL) and hard copy of the questionnaire, which invited them to go online and complete the survey or fill the hard copy in and return it to Wallis in a reply-paid envelope.

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

Key fieldwork figures are contained in Table 37 below.

Table 37 Key Fieldwork Figures

	2016		2017		2018		2019		2020	
	n=	% of mail-out	n=	% of mail-out	n=	% of mail-out	n=	% of mail-out	n=	% of mail-out
Mail-out 1 - Survey invitation	2350	100%	2770	100%	2443	100%	2540	100%	2532	100%
Mail-out 2 - Survey reminder	2128	91%	1946	70%	2064	84%	2100	83%	1995	79%
SMS	n/a	n/a	1498	54%	1456	60%	1378	54%	2108	83%
Reminder calls attempted	1784	76%	1601	58%	1864	76%	2021	80%	1929	76%
Reminder calls completed	935	40%	890	32%	909	37%	1130	44%	1570	62%
TOTAL Survey completions online	366	16%	420	15%	502	21%	542	21%	585	23%
TOTAL Survey completions hardcopy	255	11%	397	14%	347	14%	308	12%	318	13%
TOTAL Survey completions phone	142	6%	210	8%	122	5%	122	5%	134	5%
TOTAL Completions	763	32%	1027	37%	971	40%	972	38%	1037	41%
Opt-outs	1	0%	91	3%	15	1%	10	0%	14	1%
Return to senders / unusable questionnaires	59	3%	37	1%	28	1%	33	1%	13	1%
Subtotal Out-of-scope (RTS with no valid phone number)	22	1%	4	0%	4	0%	2	0%	0	0%

Sampling

The entire sample was sourced from the VicRoads Registration and Licencing database (supplied by the TAC). A random selection of 2,532 Victorians who had a motorcycle licence and/or motorcycle registered in their name was drawn from the database. Victorians who held either a Learners' or Probationary motorcycle licence were overrepresented in the sample to ensure there was sufficient numbers in these groups to analyse and report on. Victorians who had a motorcycle registered in their name as well as a licence were also oversampled as members of this group are more likely to be active riders.

Response rates

The overall response rate for the study was 41%, compared to 38% in 2019, 40% in 2018, 37% in 2017, 32% in 2016, 34% in 2015, 33% in 2014 and 30% in 2013.

Altogether 1,037 people completed the survey, of which 56% completed it online, 31% completed it on hard copy, and 13% completed it via telephone. These percentages are similar to compare to 2019, when 56% completed it online, 32% completed it via hard copy, and 13% completed it on the telephone.

Weighting

The results were weighted by registration and licence status, age, location and licence type. This was done so that the responses received reflected the characteristics of the Victorian motorcyclist population. The weighting scheme that was developed was based on motorcycle licence and registration population statistics from the VicRoads database.

The effect of the weighting is illustrated in Table 38 below.

Table 38 Sample attributes and population comparisons

Sample attributes and population figures	% of mailout	% of completions (unweighted)	% in population
Registration and licence status			
Both registration and licence	58%	64%	39%
Registration or licence only	42%	36%	61%
Licence type			
Full motorcycle licence	82%	86%	91%
Learner or probationary licence	15%	12%	7%
No Licence	2%	2%	2%
Gender			
Male	84%	81%	87%
Female	16%	19%	13%
Age			
18-25	19%	17%	4%
26-39	28%	25%	24%
40+	53%	59%	72%
Location			
Major Urban	58%	56%	57%
Other Urban	29%	29%	31%
Rural Balance	13%	15%	12%



Appendix 1

Question list for 2020 MM

Question Name	Question text	Quarters			
		Q1	Q2	Q3	Q4
M1A	Thinking about ways you get around, apart from driving or riding yourself, how often do you go somewhere by taking public transport?	Y	Y	Y	Y
M1B	How often do you go somewhere by taking a taxi or similar (e.g. Uber)?	Y	Y	Y	Y
M1C	How often do you go somewhere by walking?	Y	Y	Y	Y
M1D	How often do you go somewhere by travelling in a car or on a motorbike as a passenger?	Y	Y	Y	Y
M2	How often do you drive a car?	Y	Y	Y	Y
M2	How often, if ever, do you ride a motorcycle on the road?	Y	Y	Y	Y
M2	How often, if ever, do you drive a heavy vehicle on the road?	Y	Y	Y	Y
M2	How often, if ever, do you ride a bicycle on the road?	Y	Y	Y	Y
S1	Can I please confirm that you have ever ridden a motorcycle?	Y	Y	Y	Y
R1	Have you ridden a motorcycle in the last 12 months, either on or off-road?	Y	Y	Y	Y
R2	What are the main reasons why you haven't ridden a motorcycle in the last 12 months?	Y	Y	Y	Y
L1	At what age did you start riding a motorcycle?	Y	Y	Y	Y
L4	How frequently do you brush up your motorcycle skills to keep up to date with riding?	Y	Y	Y	Y
L4b	Which of the following resources do you use to brush up on your skills?	Y	Y	Y	Y
L5	Thinking about how you compare to the average rider on Victorian roads, would you say you are...		Y	Y	Y
L6	Have you ever attended a motorcycle rider training course for any of the following reasons?	Y	Y	Y	Y
L7	How long ago did you most recently attend a motorcycle training course?	Y	Y	Y	Y
L7	How long ago did you most recently attend a motorcycle training course?	Y	Y	Y	Y
R3A	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? (DROVE A CAR)	Y	Y	Y	Y
R3B	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? (RODE A MOTORCYCLE)	Y	Y	Y	Y
R4	Which of the following best describes your motorcycle riding history?	Y	Y	Y	Y
R5	Approximately, how long was the most recent break?	Y	Y	Y	Y
R6	What is the likelihood that you will ride again in the future?	Y	Y	Y	Y
R7	What are the main reasons you stopped riding?	Y	Y	Y	Y
R8	How old were you when you stopped riding?	Y	Y	Y	Y
H1A	How many road motorcycles are kept at your home, regardless of who owns them or registration status?	Y	Y		
H1B	How many off-road motorcycles are kept at your home, regardless of who owns them or registration status?	Y	Y		
MC1	Thinking about the one motorcycle you ride most often. What type of motorcycle is it?	Y	Y	Y	Y
MC3	In which year was it manufactured?			Y	Y
MC5	What capacity is the engine?	Y	Y		
MC7	Have you ever had a crash while riding a motorcycle, not	Y	Y	Y	Y
CRA2	Have you required medical treatment as a result of any motorcycle accident, excluding dropping your bike while stationary and also excluding a crash that occurred while participating in motorcycle sport?	Y	Y		
Q24	Thinking about the most recent crash you were involved in, when did it occur?	Y	Y	Y	Y
CRA7	Thinking about the last crash you had, what factors contributed to that crash?	Y	Y		
CRA8	Thinking about the most recent crash you were involved in, in which year did it occur?	Y	Y		

Question Name	Question text	Quarters			
		Q1	Q2	Q3	Q4
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 trips or something else.		Y	Y	Y
CRA9	Have you ever received assistance from someone you were riding with after crashing your motorcycle?			Y	Y
CRA10	How important was that assistance in your recovery?			Y	Y
TYPA	Thinking about your riding over the last 12 months, approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes? (COMMUTING)	Y	Y	Y	Y
TYPB	Thinking about your riding over the last 12 months, approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes? (RECREATION ON-ROAD)	Y	Y	Y	Y
TYPC	Thinking about your riding over the last 12 months, approximately what percentage of the time did you ride in the following categories excluding any riding you might do for work purposes? (RECREATION OFF-ROAD)	Y	Y	Y	Y
REC2	When you go for a recreational ride, how often do you ride in a group (this is with at least one other rider)?		Y	Y	Y
REC3	Would you say that when riding in a group, you tend to be less cautious, more cautious, or there is no difference in your riding style?		Y	Y	Y
RID1	Thinking now about how many kilometres you rode ON ANY motorcycle on the road for any reason over the last 12 months... Would you be able to estimate that in...?	Y	Y	Y	Y
RID1	How many kilometres did you ride on the road in an average week in the last 12 months?	Y		Y	Y
RID1	How many kilometres did you ride on the road in an average month in the last 12 months?	Y	Y	Y	Y
RID1	How many kilometres did you ride on the road in the last 12 months	Y	Y	Y	Y
RID2	Thinking now about how many hours you rode ON ANY motorcycle off road for any reason over the last 12 months... Would you be able to estimate that in...?	Y	Y	Y	Y
RID2	How many hours did you ride off road in an average week in the last 12 months?	Y	Y	Y	Y
RID2	How many hours did you ride off road in an average month in the last 12 months?	Y	Y	Y	Y
RID2	How many hours did you ride off road in the last 12 months?	Y	Y	Y	Y
FEA	Have you heard of any of the following motorcycle safety features?	Y	Y	Y	Y
FEA2	Which of these safety features do you have on the road motorbike you ride most often?	Y	Y	Y	Y
FEA3	Which of these safety features would you want for your next motorcycle?	Y	Y	Y	Y
MS	When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?	Y	Y	Y	Y
MSA	Motorcycle helmet – any type	Y	Y	Y	Y
MSD	Motorcycle riding gloves		Y	Y	Y
MSE	Motorcycle riding jacket		Y	Y	Y
MSF	Motorcycle riding pants		Y	Y	Y
MSG	One piece riding suit (where parts cannot be detached to be worn as separate pieces)		Y	Y	Y
MSH	Any type of boots (i.e. motorcycle specific riding boots or any other shoes that cover your ankles)		Y	Y	Y
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?	Y	Y	Y	Y
MS3	You mentioned that you ride, at least occasionally, without wearing a helmet. Why do you ride without a helmet?	Y	Y	Y	Y

Question Name	Question text	Quarters			
		Q1	Q2	Q3	Q4
DAN	(CAWI: For each of the following statements, using / CATI: Using) a scale where 0 is "not at all dangerous" and 10 is "extremely dangerous" how dangerous do you think it is to ...	Y	Y	Y	Y
DAN1	Ride a few kms above the posted speed limit in a 60km/h zone	Y	Y	Y	Y
DAN2	Ride a few kms above the posted speed limit in a 100km/h zone	Y	Y	Y	Y
DAN3	Ride with an illegal Blood Alcohol Content (BAC) level	Y	Y	Y	Y
DAN5	Ride while very drowsy	Y	Y	Y	Y
DAN6	Take your eyes off the road for two seconds while riding	Y	Y	Y	Y
DANG	Ride a motorcycle for a short trip without protective gear			Y	Y
POLA	In the past 12 months, how many times have you been... Pulled over by police for any reason while riding a motorcycle?	Y	Y	Y	Y
POLB	In the past 12 months, how many times have you been...breath-tested when riding a motorcycle?	Y	Y	Y	Y
POLC	In the past 12 months, how many times have you been...drug-tested when riding a motorcycle?	Y	Y	Y	Y
PREALC	Do you ever drink alcohol?	Y	Y	Y	Y
ALCA	In the last 12 months, how many times have you...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)?	Y	Y	Y	Y
ALCB	In the last 12 months, Ridden a motorcycle after drinking alcohol when you knew or thought you were under the legal blood alcohol limit?	Y	Y	Y	Y
	What is the highest number of standard alcoholic drinks would you have and still consider riding?	Y	Y	Y	Y
BEH	Now, thinking about the last three months, when you were riding. How often have you...	Y	Y	Y	Y
BEHA	Intentionally ridden above the speed limit in a 60km/h zone, even if by only a few km's per hour?	Y	Y	Y	Y
BEHB	Intentionally ridden above the speed limit in a 100km/h zone, even if by only a few km's per hour?	Y	Y	Y	Y
BEHC	Talked on a mobile phone using headphones while riding?	Y	Y	Y	Y
SPE1	How many times have you been caught speeding on your motorcycle in the last 12 months?	Y	Y	Y	Y
SPE2	How fast should people be allowed to ride a motorcycle in a 60km/h zone without being booked for speeding?	Y	Y	Y	Y
SPE4	How fast should people be allowed to ride a motorcycle in a 100km/h zone without being booked for speeding?	Y	Y	Y	Y
AT	To what extent do you agree or disagree with the following statements?	Y	Y	Y	Y
ATA	I ride over the speed limit if I'm sure I'll get away with it	Y	Y	Y	Y
ATB	I think motorcyclists should always wear motorcycle clothing (jacket, pants, boots and gloves) while riding	Y	Y	Y	Y
ATE	The only remedy for feeling drowsy while riding is to stop riding and rest	Y	Y	Y	Y
ATF	People returning to motorcycling after a break should have to undertake a motorcycle training course	Y	Y		
ATG	Drivers don't understand what it is like to be a motorcyclist	Y	Y	Y	Y
ATI	Most drivers are unaware of motorcyclists when they are driving	Y	Y	Y	Y
ATL	I never take unnecessary risks while riding	Y	Y		
ATM	I would like more information on how to stay safe while riding on the road	Y	Y	Y	Y
ATN	Sometimes I must take risks when riding a motorcycle to avoid a dangerous situation			Y	Y
AS1	Are you aware of any particular organisations or associations that speak about road safety on your behalf as a motorcycle rider?				Y
AS2	Which organisation or association do you feel best speaks on your behalf as a motorcycle rider?			Y	
D9	Further comments				Y
LIC1	Do you have a motorcycle licence?	Y	Y	Y	Y

Question Name	Question text	Quarters			
		Q1	Q2	Q3	Q4
LIC2	How old were you when you got your motorcycle licence?	Y	Y	Y	Y
LIC3	How old were you when you got your motorcycle learner's permit?	Y	Y	Y	Y
D1	What is your current employment status?	Y	Y	Y	Y
D2	How would you describe your main PAID occupation?	Y	Y	Y	Y
D3	How many hours do you work in an average week?	Y	Y	Y	Y
D4	Do you ride a motorcycle as part of your employment (excluding riding to or from work)?	Y	Y	Y	Y
D5	What is your residential postcode?	Y	Y	Y	Y
D6	Would you like to make any suggestions to the TAC about what they can do to improve rider safety?	Y	Y	Y	Y



Appendix 2

Reminder letter

JOIN OTHER MOTORCYCLISTS IN MAKING OUR ROADS SAFER

{title} {given_nm} {surname}
{Add_Line1} {Add_Line2}
{suburb} {State} {Postcode}

{Lodgement Date}

Project: {Job}
ID: {PIN}

Dear {Title} {given_nm} {surname}

We recently invited you to take part in a Motorcycle Rider Survey conducted by Wallis for the Transport Accident Commission. If you have already completed it, thank you! If not, there is still time.

Make sure your views and experiences are included by taking this survey. Your feedback does play an important part in improving road safety in Victoria.

Please remember, anyone who has ever ridden a motorcycle is eligible to take part, even if you no longer ride.

The survey takes around 15 minutes, and all participants will be able to enter the major prize draw.

HELP MAKE OUR ROADS SAFER AND WIN \$1000

- All participants will be able to enter a draw for \$1,000, paid as an Electronic Funds Transfer to nominated bank account or as a GiftPay eGiftCard, as selected by the winner
- You don't have to enter to take part in the survey

The survey and the prize draw are voluntary. Wallis Market and Social Research is conducting the survey and any personally identifiable information you give us will remain confidential and will be de-identified. You can get more information about the study at www.wallisgroup.com.au/motoridersurvey. Alternatively you can call us on 1800 113 444.

We hope you decide to take part in this important study and thank you in advance for your time.

Kind Regards,



Samantha Cockfield
Senior Manager, Road Safety
Transport Accident Commission (TAC)



Josephine Foti
Director
Wallis Market & Social Research

You can take part in one of three ways:



1. Online

Just enter {Link} into your internet browser and you will be taken to the start of the survey.



2. Mail

If you still have it, complete the survey and mail it back to Wallis in the supplied reply paid envelope.



3. Phone

If we haven't heard from you one of our interviewers may call you to do the interview on the phone. The survey will close on {CATICloseDate}. If you'd like to make an appointment to do the survey by phone, please call us on 1800 113 444 or send an email to roadsafetysurvey@wallisgroup.com.au.



Appendix 3

Example questionnaire
(hardcopy and primary approach letter)

Motorcycle Rider Survey

<<DPID_RTS>>
{title} {given_nm} {surname}
{Add_Line1} {Add_Line2}
{suburb} {State} {Postcode}

{Lodgement Date}

Dear {given_nm},

Project: {Job} | ID: {PIN}

You have been randomly selected to take part in a study of Victorian motorcyclists for the Transport Accident Commission (TAC). Anyone who has ever ridden a motorcycle is eligible to take part, even if you no longer ride. Join other Victorian motorcyclists in playing an important role in improving road safety in Victoria.



Make your roads safer and win up to \$1,500

- The survey takes around 15 minutes
- If you complete the survey online before {EarlyPrizeDate}, you can enter both the main prize draw for \$1,000, and an additional 'early completion' prize draw for \$500
- As long as you complete the survey by {SurveyCloseDate}, you can still enter the main prize draw for \$1,000
- Prizes will be paid as either an Electronic Funds Transfer to a nominated bank account or as a GiftPay eGiftCard, as selected by the winner(s)
- You don't have to enter to take part in the survey

The survey and the prize draw are voluntary. Wallis Market and Social Research is conducting the survey and any personally identifiable information you give us will remain confidential and will be de-identified. You can get more information about the study at www.wallisgroup.com.au/survey/motoridersurvey. Alternatively you can call us on 1800 113 444.

We hope you decide to take part in this important study and thank you in advance for your time.

Kind Regards,

Samantha Cockfield
Senior Manager, Road Safety
Transport Accident Commission (TAC)

Josephine Foti
Principal
Wallis Market & Social Research

Three ways to complete the survey:



Online

Just enter {Link} into your internet browser and you will be taken to the start of the survey.



Mail

Complete the enclosed survey and mail it back to Wallis in the supplied reply paid envelope.



Phone

If we haven't heard from you by the {CATIStartDate} our interviewers may call you to do the interview on the phone. The survey will close on {CATICloseDate}. If you'd like to make an appointment to do the survey by phone, please call us on 1800 113 444 or send an email to roadsafetysurvey@wallisgroup.com.au.

FREQUENTLY ASKED QUESTIONS

Is the information collected confidential?

Your individual responses will remain strictly confidential and will be reported only in aggregate form as part of the general findings from the survey. You can see examples of previous reports at:

<http://www.tac.vic.gov.au/road-safety/statistics/about-tac-surveys/road-safety-and-marketing-surveys>

The only identifying feature on the questionnaire is an ID number which we use to avoid sending you reminders after you have returned the completed questionnaire.

The link between this ID and your name and address on this page is securely stored. Wallis Market and Social Research is required to comply with applicable privacy laws and takes all reasonable steps to protect any personal information from unauthorised access, use, disclosure or loss. You can view our privacy policy on our website at: www.wallisgroup.com.au/privacy

Your personal information will not be disclosed to other organisations for marketing or research purposes. You can access your personal information held by Wallis by contacting them on (free call) **1800 113 444**.

Where did you get my details?

Your name and address were randomly selected from the VicRoads database of licence holders and people with registered vehicles. This information was provided in accordance with the VicRoads privacy policy, which can be viewed on their website by opening the 'Protecting your privacy brochure' at the bottom of this web page: <https://www.vicroads.vic.gov.au/website-terms/privacy>

More information can be found at www.tac.vic.gov.au/surveys, or you can contact the TAC on 1300 654 329.

Someone else in my house wants to fill it out instead of me. Is this OK?

The survey is designed to be filled out specifically by the person listed on the front of this booklet. In order to make sure we survey a representative selection of the population, we selected the recipient of this letter specifically to match certain characteristics (age and gender). If someone other than the named person fills it out, we can't be sure that everyone is getting an equal say.

Why do people who complete the survey online get more chances at prizes?

The TAC aims to minimise the expense of this necessary research, so that the savings can be used for road safety programs. Collecting your responses online costs considerably less than over the phone or by mail, so we want to encourage people to choose the option which incurs less expense to the TAC. Other options are also provided (and people are still given a chance to enter the main prize draw) so that no one misses out if they don't want to (or can't) participate in the online version.

The survey link isn't working. What do I do?

Please send us an email at roadsafetysurvey@wallisgroup.com.au or call us on **1800 113 444** (free call) and someone will help you.

HOW TO FILL IN THIS QUESTIONNAIRE

To answer most of the questions you only need to mark a box with a tick or cross: ⁰¹ ⁰¹

Please mark the box which is closest to your view—there are no right or wrong answers. If you make a mistake, please colour the error box, like this: ⁰¹ and then mark the correct one.

Some boxes have instructions that look like this: ► **GO TO 3** If you chose an answer with a 'GO TO', please follow this 'GO TO' instruction even if you miss out on some questions. If the instruction is ► **CONTINUE** then go to the next question.

Please read each question carefully. Where exact information is not known, please give the best answer you can.

We hope you enjoy doing the questionnaire, and thank you very much for taking part in this study.

HOW TO SEND IT BACK

Simply fill in the survey, use the reply paid envelope and mail to:

Wallis - Level 2, 273 Camberwell Road - Camberwell VIC 3124

WHAT ARE CONSIDERED MOTORCYCLES FOR THE PURPOSES OF THIS SURVEY

Motorcycles INCLUDED for the purposes of this survey

all registered **and** unregistered road, off-road, scooters or mopeds such as:



Sports bikes



Sports tourers



Cruisers



Dual sports



Trail / off-road bikes



Moped / Scooters

Motorcycles EXCLUDED for the purposes of this survey



Monkey bikes



Motorised bicycles



Quad bikes



Motorised toy scooters

HOW YOU GET AROUND

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.

Q1 Thinking about ways you get around, apart from driving or riding yourself, how often do you go somewhere by...?

i Please enter one response per line

	Never 01	Once every 6 months or less 02	Every couple of months 03	About once a month 04	About once a fortnight 05	About once a week 06	2-4 days a week 07	5-7 days a week 08
A Taking public transport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B Taking a taxi or similar (e.g. Uber)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D Travelling in a car or on a motorbike as a passenger	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q2 How often, if ever, do you drive or ride the following on the road...?

i Please enter one response per line

	Never 01	Once every 6 months or less 02	Every couple of months 03	About once a month 04	About once a fortnight 05	About once a week 06	2-4 days a week 07	5-7 days a week 08
A Motorcycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B Car	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C Heavy vehicle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D Bicycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

YOUR RIDING

Q3 Have you ridden a motorcycle in the **last 12 months** (either on or off-road)?

01 Yes ► **GO TO Q5** 02 No ► **CONTINUE**

Q4 What are the main reasons why you haven't ridden a motorcycle in the **last 12 months**?

i Please select all that apply

<input type="checkbox"/> 01 Motorcycle related injury	<input type="checkbox"/> 05 Family commitments/change in lifestyle
<input type="checkbox"/> 02 Non-motorcycle related injury	<input type="checkbox"/> 06 Moved locations, so became too far to ride
<input type="checkbox"/> 03 No longer own a motorcycle	<input type="checkbox"/> 07 Too busy/never have time to ride
<input type="checkbox"/> 04 Too expensive to maintain a motorcycle	<input type="checkbox"/> 08 Prefer to travel using other modes (drive, cycle, public transport etc.)
<input type="checkbox"/> 95 Other (write in)	<input type="text"/>
<input type="text"/>	

LEARNING TO RIDE

Q5 At what age did you start riding a motorcycle?

i Please write in

Years old

Q6 Thinking about how you compare to the average rider on Victorian roads, would you say you are...?

i Please select one only

- | | |
|--|---|
| <input type="checkbox"/> ⁰¹ A much better rider | <input type="checkbox"/> ⁰⁵ A slightly worse rider |
| <input type="checkbox"/> ⁰² A better rider | <input type="checkbox"/> ⁰⁶ A worse rider |
| <input type="checkbox"/> ⁰³ A slightly better rider | <input type="checkbox"/> ⁰⁷ A much worse rider |
| <input type="checkbox"/> ⁰⁴ An about average rider | <input type="checkbox"/> ⁹⁹ Don't know |

i IF YOU HAVE RIDDEN A MOTORCYCLE IN THE LAST 12 MONTHS, ANSWER Q7 BELOW, OTHERWISE ► GO TO Q12

Q7 How frequently do you brush up your motorcycle skills to keep up to date with riding?

- | | |
|--|---|
| <input type="checkbox"/> ⁰¹ Never ► GO TO Q9 | <input type="checkbox"/> ⁰⁵ About once a fortnight |
| <input type="checkbox"/> ⁰² Once every 6 months or less | <input type="checkbox"/> ⁰⁶ About once a week |
| <input type="checkbox"/> ⁰³ Every couple of months | <input type="checkbox"/> ⁰⁷ 2-4 days a week |
| <input type="checkbox"/> ⁰⁴ About once a month | <input type="checkbox"/> ⁰⁸ 5-7 days a week |

Q8 Which of the following resources do you use to brush up on your skills?

i Please select all that apply

- | | |
|---|---|
| <input type="checkbox"/> ⁰¹ Friends or family | <input type="checkbox"/> ⁰⁴ Magazines or books |
| <input type="checkbox"/> ⁰² YouTube | <input type="checkbox"/> ⁰⁵ A riding school |
| <input type="checkbox"/> ⁰³ A motorcycling website | <input type="checkbox"/> ⁰⁶ Another website |
| <input type="checkbox"/> ⁹⁵ Somewhere else (<i>write in</i>) | <input type="text"/> |

Q9 Have you ever attended a motorcycle rider training course for any of the following reasons?

i Please select all that apply

- | | |
|---|---|
| <input type="checkbox"/> ⁰¹ Assist with getting learners permit or licence | <input type="checkbox"/> ⁰⁴ Learn to ride a specific type of motorcycle (off-road, adventure, quad etc.) |
| <input type="checkbox"/> ⁰² Improve your road riding skills | <input type="checkbox"/> ⁹⁵ Other (<i>write in</i>) <input type="text"/> |
| <input type="checkbox"/> ⁰³ Improve your racing skills | <input type="checkbox"/> ⁹⁷ None of these ► GO TO Q11 |

Q10 How long ago did you most recently attend a motorcycle training course?

<input type="checkbox"/> ⁰¹ Within the past year	<input type="checkbox"/> ⁰³ More than 5 years ago
<input type="checkbox"/> ⁰² 1 to 5 years ago	<input type="checkbox"/> ⁹⁹ Unsure / don't know

Q11 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?

i Please enter percentages. Note percentages need to add to 100

%	Drove a car
%	Rode a motorcycle
100 %	TOTAL

Q12 Which of the following best describes your motorcycle riding history?

i Please select one only

<input type="checkbox"/> ⁰¹ I have never had a break from riding since learning to ride and ride regularly ▶ GO TO Q17
<input type="checkbox"/> ⁰² I have never had a break from riding since learning to ride but only ride occasionally ▶ GO TO Q17
<input type="checkbox"/> ⁰³ I had a break from riding and have started riding again ▶ GO TO Q13
<input type="checkbox"/> ⁰⁴ I have stopped riding and may decide to ride in the future ▶ GO TO Q14
<input type="checkbox"/> ⁰⁵ I have stopped riding and do not intend to ride again ▶ GO TO Q15
<input type="checkbox"/> ⁰⁶ I have never ridden a motorcycle ▶ GO TO Q49

i **IF IN Q12 YOU ANSWERED “I HAD A BREAK FROM RIDING AND HAVE STARTED RIDING AGAIN,” ANSWER Q13 BELOW**

Q13 Approximately, how long was the most recent break?

i Please select one only

<input type="checkbox"/> ⁰¹ Up to 11 months ▶ GO TO Q17	<input type="checkbox"/> ⁰⁴ 6 - 10 years ▶ GO TO Q17
<input type="checkbox"/> ⁰² 1 - 2 years ▶ GO TO Q17	<input type="checkbox"/> ⁰⁵ 11 years or more ▶ GO TO Q17
<input type="checkbox"/> ⁰³ 3 - 5 years ▶ GO TO Q17	

i **IF IN Q12 YOU ANSWERED “I HAVE STOPPED RIDING AND MAY DECIDE TO RIDE IN THE FUTURE” ANSWER Q14 BELOW**

Q14 What is the likelihood that you will ride again in the future?
Please select any number from 0 - 10 where 0 is “extremely unlikely” and 10 is “extremely likely”.

Extremely unlikely	←	→	Extremely likely	Don't know							
0	1	2	3	4	5	6	7	8	9	10	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00	01	02	03	04	05	06	07	08	09	10	99
NOW ▶ GO TO Q16											



IF IN Q12 YOU ANSWERED "I HAVE STOPPED RIDING AND DO NOT INTEND TO RIDE AGAIN"
ANSWER Q15 BELOW

Q15 What are the main reasons you stopped riding?

Please select all that apply

<input type="checkbox"/> ⁰¹ Motorcycle related injury	<input type="checkbox"/> ⁰⁶ Too busy/never have time to ride
<input type="checkbox"/> ⁰² Non-motorcycle related injury	<input type="checkbox"/> ⁰⁷ Prefer to travel using other modes (drive, cycle, public transport etc.)
<input type="checkbox"/> ⁰³ Too expensive to maintain a motorcycle	<input type="checkbox"/> ⁰⁸ Licence suspended
<input type="checkbox"/> ⁰⁴ Family commitments/change in lifestyle	<input type="checkbox"/> ⁰⁹ Safety concerns
<input type="checkbox"/> ⁰⁵ Moved locations, so became too far to ride	<input type="checkbox"/> ¹⁰ No longer interested in riding/motorcycles
<input type="checkbox"/> ⁹⁵ Other (write in) <input type="text"/>	

Q16 How old were you when you stopped riding?

Please write age in years Years old

MOTORCYCLES IN YOUR HOUSEHOLD

Please note: For the purposes of this survey, a motorcycle includes all registered and unregistered motorcycles that you own including all types of road bikes, off-road/trail bikes, scooters, or mopeds. For the purposes of this survey, the following are NOT considered to be motorcycles: motorised bicycles; toy motorbikes such as monkey bikes; and quad bikes. (Refer to page 3 of this questionnaire).

Q17 Thinking about the one motorcycle you ride **most often**, what type of motorcycle is it?

Please select one only *If you ride an Adventure Bike, please select 'Other' road bike and specify*

<input type="checkbox"/> ⁰¹ Off road bike / trail bike	<input type="checkbox"/> ⁰³ Cruiser	<input type="checkbox"/> ⁰⁵ Sports tourer
<input type="checkbox"/> ⁰² Sports bike	<input type="checkbox"/> ⁰⁴ Scooter	<input type="checkbox"/> ⁰⁶ Dual sport
<input type="checkbox"/> ⁹⁴ Other road bike (write in below)		
<input type="text"/>		
<input type="checkbox"/> ⁹⁵ Other type of bike (write in below)		
<input type="text"/>		
<input type="checkbox"/> ⁹⁹ Can't recall ► GO TO Q20		

Q18 In which year was it manufactured?

Please write in year ⁹⁹ Don't know

Q19 What capacity is the engine? *Please select one only*

<input type="checkbox"/> ⁰¹ 0 - 125cc	<input type="checkbox"/> ⁰³ 251 - 550cc	<input type="checkbox"/> ⁰⁵ 701 - 1000cc	<input type="checkbox"/> ⁹⁹ Don't know
<input type="checkbox"/> ⁰² 126 - 250cc	<input type="checkbox"/> ⁰⁴ 551 - 700cc	<input type="checkbox"/> ⁰⁶ 1001+ cc	

CRASH HISTORY

This next section asks you about any accidents you may have had on a motorcycle.

Q20 Have you **ever** had a crash while riding a motorcycle? *Please do not include dropping your bike while stationary or a crash that occurred while participating in motorcycle sport.*

⁰¹ Yes ► **CONTINUE**

⁰² No ► **GO TO Q24**

⁹⁸ Prefer not to say ► **GO TO Q24**

Q21 Thinking about the most recent crash you were involved in, when did it occur?

i Please select one only

⁰¹ Within the last 12 months

⁰⁴ 11 or more years ago

⁰² 1 to 5 years ago

⁹⁹ Can't say

⁰³ 6 to 10 years ago

Q22 Have you ever received assistance from someone you were riding with after crashing your motorcycle?

⁰¹ Yes ► **CONTINUE**

⁰² No ► **GO TO Q24**

Q23 How important was that assistance in your recovery?

i Please select one only

⁰¹ Very important

⁹⁹ Don't know

⁰² Moderately important

⁹⁸ Prefer not to say

⁰³ Not at all important

Q24 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.

i Please write in

THE NEXT SECTION OF THE QUESTIONNAIRE (BLACK BORDERS) IS FOR MORE ACTIVE RIDERS.

PLEASE COMPLETE THE PAGES WITH BLACK BORDERS (PAGES 9-13) IF YOU HAVE RIDDEN A MOTORCYCLE IN THE LAST 12 MONTHS

i IF YOU HAVE NOT RIDDEN A MOTORCYCLE IN THE LAST 12 MONTHS ► GO TO Q49

TYPES OF RIDING

Q25 Thinking about your riding over the **last 12 months**, approximately what percentage of the time did you ride in the following categories **excluding any riding you might do for work purposes?**

i Please enter percentages or '0' where relevant. Note that percentages need to add to 100.

	%	Commuting purposes (going to work, study, shops)
	%	Recreation on-road (public roads, highways, freeways)
	%	Recreation off-road (tracks in national parks or on private property)
100	%	TOTAL

i IF YOU HAVE RIDDEN ON-ROAD IN THE LAST 12 MONTHS, ANSWER Q26 BELOW, OTHERWISE ► GO TO Q29

Q26 When you go for a recreational ride, how often do you ride in a group (with at least one other rider)?

i Please select one only

- | | |
|---|---|
| <input type="checkbox"/> ⁰¹ None of the time ► GO TO Q28 | <input type="checkbox"/> ⁰⁴ Most of the time |
| <input type="checkbox"/> ⁰² Some of the time | <input type="checkbox"/> ⁰⁵ All of the time |
| <input type="checkbox"/> ⁰³ About half of the time | <input type="checkbox"/> ⁹⁹ Don't know ► GO TO Q28 |

Q27 When riding in a group, do you tend to be less cautious, more cautious, or is there no difference to your riding style?

- | | | |
|--|--|--|
| <input type="checkbox"/> ⁰¹ Less cautious | <input type="checkbox"/> ⁰² More cautious | <input type="checkbox"/> ⁰³ No difference |
|--|--|--|

Q28 In the last **12 months**, how many kilometres did you ride ON ANY motorcycle **on the road** for any reason?

i An approximate number is OK. Please answer **only one** of the below.

<input type="text"/> km in an average WEEK	<input type="text"/> km in an average MONTH	<input type="text"/> km in the last YEAR
--	---	--

⁹⁹ Don't know

Q29 In the last **12 months**, how many **hours** did you ride ON ANY motorcycle **off road** for any reason?

i An approximate number is OK. Please answer **only one** of the below.

<input type="text"/> hours in an average WEEK	<input type="text"/> hours in an average MONTH	<input type="text"/> hours in the last YEAR
---	--	---

⁹⁹ Don't know

MOTORCYCLE SAFETY FEATURES

The following questions are about motorcycle safety.

Q30 Have you heard of any of the following motorcycle safety features?

- | | |
|---|---|
| <input type="checkbox"/> ⁰¹ ABS (Anti-lock braking system) | <input type="checkbox"/> ⁰⁴ Motorcycle Stability Control and/or dual/linking braking |
| <input type="checkbox"/> ⁰² Speed limiter function | <input type="checkbox"/> ⁰⁵ Motorcycle to vehicle communication |
| <input type="checkbox"/> ⁰³ Traction control | <input type="checkbox"/> ⁹⁷ I have heard of none of these ► GO TO Q33 |

i IF YOU HAVE HEARD OF ANY OF THE FEATURES IN Q30 ABOVE AND RIDE A ROAD BIKE OR SCOOTER ANSWER Q31 BELOW, OTHERWISE ► **GO TO Q33**

Q31 Which of these safety features do you have on the road motorcycle you currently ride most often?

i Please select all that apply

- | | |
|---|---|
| <input type="checkbox"/> ⁰¹ ABS (Anti-lock braking system) | <input type="checkbox"/> ⁰⁴ Motorcycle Stability Control and/or dual/linking braking |
| <input type="checkbox"/> ⁰² Speed limiter function | <input type="checkbox"/> ⁹⁷ My bike has none of these features |
| <input type="checkbox"/> ⁰³ Traction control | |

Q32 Which of these safety features would you want for your next motorcycle?

i Please select all that apply

- | | |
|---|---|
| <input type="checkbox"/> ⁰¹ ABS (Anti-lock braking system) | <input type="checkbox"/> ⁰⁴ Motorcycle Stability Control and/or dual/linking braking |
| <input type="checkbox"/> ⁰² Speed limiter function | <input type="checkbox"/> ⁰⁵ Motorcycle to vehicle communication |
| <input type="checkbox"/> ⁰³ Traction control | <input type="checkbox"/> ⁹⁷ I don't want any of these features on my next bike |

PROTECTIVE MOTORCYCLE CLOTHING

Q33 When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?

i Please select one answer per row

	All the time 01	Most of the time 02	About half the time 03	Some of the time 04	Own it - never wear it 05	Don't own it - never wear it 06	Don't know 99
A Motorcycle helmet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B Motorcycle riding gloves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C Motorcycle riding jacket	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D Motorcycle riding pants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E One piece riding suit (Note: this refers to a suit where parts cannot be detached to be worn as separate pieces)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F Any type of boots (i.e. motorcycle specific riding boots or any other shoes that cover your ankles)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



IF YOU WEAR A MOTORCYCLE HELMET AT LEAST SOME OF THE TIME WHEN RIDING, PLEASE ANSWER Q34 BELOW, OTHERWISE ► GO TO Q35

Q34

Thinking about the type of helmet you wear when riding a motorcycle, do you wear a full face helmet, open face helmet, or both?



Please select one only

- ⁰¹ Wear a full face helmet all the time
- ⁰² Wear an open face helmet all the time
- ⁰³ Both, wear an open face helmet some of the time and a full face helmet some of the time
- ⁹⁹ Don't know



IF YOU DON'T WEAR A MOTORCYCLE HELMET ALL THE TIME WHEN RIDING, PLEASE ANSWER Q35 BELOW, OTHERWISE ► GO TO Q36

Q35

You mentioned that you ride, at least occasionally, without wearing a helmet. Why do you ride without a helmet?



Please write in below

These next few questions are about how dangerous a number of behaviours are.

Q36

Using a scale where **0** is “not at all dangerous” and **10** is “extremely dangerous” how dangerous do you think it is to...?



Please select one answer per row

Not at all dangerous ← 0 1 2 3 4 5 6 7 8 9 10 → Extremely dangerous
00 01 02 03 04 05 06 07 08 09 10




Don't know
99

	0	1	2	3	4	5	6	7	8	9	10	Don't know
A Ride a few kms above the posted speed limit in a 60km/h zone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B Ride a few kms above the posted speed limit in a 100km/h zone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C Ride with an illegal Blood Alcohol Content (BAC) level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D Ride while very tired	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E Take your eyes off the road for two seconds while riding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F Ride a motorcycle for a short trip without protective gear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For the following questions, we are asking about what you do when you're riding your motorcycle on the road, not when you are driving a car. Please note that your answers are completely confidential.

Q37 In the last 12 months, how many times have you been...?

i Please select one answer per row

		Not at all 01	Once 02	Twice 03	Three or more times 04	Prefer not to say 98	Don't know 99
A	 Pulled over by police for any reason while riding a motorcycle	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B	 Breath-tested while riding, where you blew into the testing device	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C	 Drug-tested while riding, where you wiped the testing device on your tongue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q38 Do you ever drink alcohol?

01 Yes ▶ CONTINUE 02 No ▶ GO TO Q41 98 Prefer not to say ▶ GO TO Q41

Q39 In the last 12 months, how many times have you...?

i Please select one answer per row

		Not at all 01	Once 02	Twice 03	Three or more times 04	Prefer not to say 98	Don't know 99
A	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)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B	Ridden a motorcycle after drinking alcohol when you knew or thought you were under the legal blood alcohol limit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q40 What is the highest number of standard alcoholic drinks you would have and still consider riding?

i Please select one only

01 One 04 I would not ride after drinking any alcohol
 02 Two 98 I'd rather not say
 03 Three or more

Q41 In the last 3 months, when you were riding, how often have you...?

i Please select one answer per row

		None of the time 01	Some of the time 02	About half the time 03	Most of the time 04	All of the time 05	Don't know 99
A	Intentionally ridden above the speed limit in a 60km/h zone , even if by only a few km's per hour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B	Intentionally ridden above the speed limit in a 100km/h zone , even if by only a few km's per hour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C	Talked on a mobile phone using headphones while riding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q42 How many times have you been caught speeding on your motorcycle in the **last 12 months**?

Please select one only

<input type="checkbox"/> ⁰¹ Not at all in the last 12 months	<input type="checkbox"/> ⁰⁴ Three or more times in the last 12 months
<input type="checkbox"/> ⁰² Once in the last 12 months	<input type="checkbox"/> ⁹⁸ Prefer not to say
<input type="checkbox"/> ⁰³ Twice in the last 12 months	

Q43 How fast should people be allowed to ride a motorcycle in a **60km/h** zone without being booked for speeding?

Please write the speed in the box below

<input type="text"/>	km per hour	<input type="checkbox"/> ⁹⁹ Don't know
----------------------	-------------	---

Q44 How fast should people be allowed to ride a motorcycle in a **100km/h** zone without being booked for speeding?

Please write the speed in the box below

<input type="text"/>	km per hour	<input type="checkbox"/> ⁹⁹ Don't know
----------------------	-------------	---

Q45 To what extent do you agree or disagree with the following statements?

Please select one answer per row

	Strongly disagree <small>01</small>	Somewhat disagree <small>02</small>	Neither <small>03</small>	Somewhat agree <small>04</small>	Strongly agree <small>05</small>	Don't know <small>99</small>
A I ride over the speed limit if I'm sure I'll get away with it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B I think motorcyclists should always wear motorcycle clothing while riding (e.g. jacket, pants, boots and gloves)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C The only remedy for feeling very tired while riding is to stop riding and rest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D Drivers don't understand what it is like to be a motorcyclist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E Most drivers are unaware of motorcyclists when they are driving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F I would like more information on how to stay safe while riding on the road	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G Sometimes I must take risks when riding a motorcycle to avoid a dangerous situation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q46 Are you aware of any particular organisations or associations that speak about road safety on your behalf as a motorcycle rider?

<input type="checkbox"/> ⁰¹ Yes ► CONTINUE	<input type="checkbox"/> ⁰³ Unsure ► GO TO Q48
<input type="checkbox"/> ⁰² No ► GO TO Q48	<input type="checkbox"/> ⁹⁸ Prefer not to say ► GO TO Q48



IF YOU ANSWERED YES AT Q46, PLEASE ANSWER Q47 BELOW, OTHERWISE ► GO TO Q48

Q47

Which organisation or association do you feel best speaks on your behalf as a motorcycle rider?



Please write in



⁰² Unsure of the name



⁹⁸ Prefer not to say

Q48

If you have any further comments about road safety please write them in below



⁹⁷ Nothing further to add

ALL RESPONDENTS TO COMPLETE THIS SECTION

HISTORY OF MOTORCYCLE USE

Finally we just have a few questions about you to help us analyse the results of the survey.

Q49

Do you have a motorcycle licence?



Please select one only



⁰¹ Yes – Learner’s Permit (L-Plates) ► GO TO Q51



⁰² Yes – Probationary (P-Plates) ► CONTINUE



⁰³ Yes – Full Licence ► CONTINUE



⁰⁴ No – No longer hold a motorcycle/motor-scooter licence (Expired) ► CONTINUE



⁰⁵ No – Never held a motorcycle/motor-scooter licence ► GO TO Q52



IF YOU HOLD A LEARNER’S MOTORCYCLE LICENCE ► GO TO Q51

IF YOU HAVE NEVER HELD A MOTORCYCLE LICENCE ► GO TO Q52

Q50

How old were you when you got your motorcycle licence? (Please exclude any time on L plates)



Please write age in years

Years old

Q51 How old were you when you got your motorcycle learner's permit?

i Please write age in years Years old

DEMOGRAPHICS

Q52 What is your current employment status?

i Please select one only

⁰¹ Employed full-time ▶ CONTINUE

⁰² Employed part-time or casual ▶ CONTINUE

⁰³ Self-employed ▶ CONTINUE

⁰⁴ Student, not working ▶ GO TO Q56

⁰⁵ Unemployed ▶ GO TO Q56

⁰⁶ Home duties ▶ GO TO Q56

⁰⁷ Retired ▶ GO TO Q56

⁹⁵ Other (write in) ▶ CONTINUE

Q53 How would you describe your main **PAID** occupation? E.g. Foreman at workshop / tax advisor / retail manager / sous chef / short order cook.

i Please write in your **job title** and a **brief description of what you do**

Q54 How many hours do you work in an average week?

Hours per week

Q55 Do you ride a motorcycle as part of your employment (excluding riding to or from work)?

i Please select one only

⁰¹ Yes ⁰² No

Q56 What is your residential postcode?

i Please write in postcode

Q57 Would you like to make any suggestions to the TAC about what **they** can do to improve rider safety?

Q58 Would you be interested in participating in other TAC research into motorcycle safety or other road safety related research?

⁰¹ Yes, I would be interested ► **CONTINUE** ⁰² No, I would not be interested ► **GO TO Q60**

Q59 Your survey data will be stored in a de-identified format and your answers will remain confidential. Please note, Wallis will keep your contact details separately from your survey answers, but may need to link them briefly so we can contact the appropriate people for specific TAC projects. Is this still okay?

⁰¹ Yes ⁰² No

Q60 Would you like to enter the draw to win an eGiftCard prize of \$1000? It will be drawn on the 15th of December 2020 at the Wallis office in Camberwell.

⁰¹ Yes, I would like to enter the prize draw ⁰² No, I would not like to enter the prize draw

i **PLEASE COMPLETE THE BOX BELOW IF YOU ANSWERED “YES” FOR Q59 OR Q60**

First Name	
Phone	
Email	

Please note: Your personal details will be treated in strict confidence and will only be used for the purposes of contacting you for the reasons above. If you have indicated an interest in further research, please note your details will be forwarded to the TAC for this purpose. Please be assured that your personal details will be treated in strict confidence and will remain separate to your responses to this survey.

THAT IS THE END OF THE QUESTIONNAIRE

**Please put the questionnaire into the pre-paid reply envelope and post it back to us.
Thank you again for your co-operation.**

Prize draw details: Entry to the prize draw open to individuals as named on the cover letter who complete and return the survey. To enter, the invited respondent must complete the survey online at the website using the details listed on the cover letter, over the phone by calling 1800 113 444, or by returning this form in the reply paid envelope supplied. Winning individuals will be notified by telephone and in writing where contact details are available.