Social Research Institute
Understanding Society

Motorcycle Monitor 2014

Prepared for the Transport and Accident Commission

REPORT OF FINDINGS

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1. Executive summary and research implications

The Motorcycle Monitor was conducted for the third time in 2014 by the Ipsos Social Research Institute on behalf of the Transport and Accident Commission (TAC) in Victoria.

The study was undertaken to gather detailed information about motorcycle riders, their attitudes toward road safety, and behaviour while riding. The intention was to gain a fully representative sample of the motorcycle rider population. The survey was conducted online, telephone or by hardcopy. A total of 784 motorcycle licence or registration holders completed the survey in June-July 2014 from a sample of 2,350.

Overall there were few differences between the results in 2013 and 2014. One of the differences included an increase in active riders in 2014 compared to 2013. The proportion of active riders (55%) was in line with the population in 2012. There were also fewer off-road riders compared to 2013 (43% compared to 54% in 2013), although the incidence of off-road riding is in line with that reported in 2012 (41%).

In terms of attitudinal differences between respondents in 2013 and 2014, there was an increase in those who disagreed that those returning to riding should have to go through a rider training course (41% disagreed vs. 54% in 2013), although there were more riders in 2014 who had reported they had recently returned to riding.

One attitudinal measure worth monitoring over the next few years is attitudes to speeding in higher speed zones with fewer respondents in 2014 nominating a speed of 100km per hour as the speed people should be able allowed to ride before they are booked (46% vs. 58% in 2013 and 55% in 2012).

Key findings from the research are summarised below.

Learning to ride

The majority of respondents held a full motorcycle licence (91%). A combined 7% had either a learner's or probationary licence. The average age that respondents got their motorcycle licence (excluding any time on their Ls) was 25.0 years old.

The average age respondents said they had learnt to ride was 18.8 years old. Males tended to start riding at an earlier age than females (18.1 compared to 24.8 years old). Recreational off-road riders were also more likely to start riding at an earlier age (35% started riding under the age of 11).

Respondents were most likely to say they were self-taught riders (46%). A further 20% reported they were taught by their parents. In comparison, 30% said they had been taught to ride by an accredited riding instructor. However, when asked specifically what, if any, rider courses they had attended, 56% said they had taken part in a motorcycle rider training course of some sort, suggesting that while a substantial proportion did attend these type of classes, it was not where they initially learnt to ride.

More than half of respondents reported they had first learnt to ride on an off-road bike (57%). This compares to only 25% of respondents who said they currently mainly ride an off-road bike.

The only notable change in 2014 related to the whether people returning to riding should have to take training courses lower agreement compared to 2013 (41% vs. 54%). However, when looking at riding history, it should be noted that there has been an increase in those who had been on a break but had returned to riding compared to in 2013 (17% compared to 9%).

Riding activity

As with the previous surveys, the majority of respondents had ridden a motorcycle in the last 12 months (62% in 2014 compared to 57% in 2013 and 71% in 2012). Those aged 18-25 were more likely to have done so than those who were older (90% had ridden in the last year). No longer owning a motorcycle and family commitments and/or changes in lifestyle were the most common reasons for not riding in the last 12 months. Those who had stopped riding, on average, did so at the age of 36 years old.

In comparing riding activity of respondents between in 2013 and 2014, there was a significant increase in respondents who were actively riding – on par with proportions in 2012 (55% in 2014, vs. 42% in 2013 vs. 55% in 2012) with the overall mix of riding activity similar to that in 2012. With the increase in those actively riding in 2014, there was a corresponding decrease in those classified as former riders (5% vs. 10% in 2013) or lapsed riders (40% vs. 48% in 2013) (i.e. those who had stopped riding and did not intend to ride in the future or they had stopped riding but may decide to ride again in the future respectively). Lapsed riders tended to report a high likelihood of getting on the bike again (with 56% providing a 7-10 out of 10 on a 0-10 likelihood scale).

Recreational on-road riding remained the most common riding purpose, with a lower number of respondents saying they rode recreationally off-road compared to 2014 (43% vs. 54% in 2013).

In 2014, around half of respondents said they had ridden up to an average of 500km in a month (56%). The average distance travelled per month was 416.4km per month or approximately 4996.4km in the last year.

Attitudes towards speeding and speeding behaviour

Close to one in five active riders said they had been pulled over by police in the last 12 months (16%).

When asked about their own speeding behaviour, six in ten (62%) reported that they would not 'ride over the speed limit if I'm sure I'll get away with it'. This has remained steady over the last 3 years of the Motorcycle Monitor.

When asked about speeding in a 60km zone, similar proportions of riders reported people should only ride up to 60kph in these areas as in previous years. Six in ten respondents nominated a speed limit of 60km or lower as the speed that people should be able to travel without being booked (58%). Regardless of the speed they thought you should be able to travel before being booked, more than half of respondents said they would never ride above that speed in a 60km zone (59%).

However, in the case of 100km zones, fewer active riders said that you should only be able to go 100km or less compared to in 2013 (46% vs. 58% in 2013). One in two respondents said they would never ride above the speed limit they nominated as the appropriate speed you should be able to travel before being booked for speeding.

Respondents were also less likely to report that they would never ride at or above the speed they nominated as acceptable compared to 60km zones (although this pattern is consistent with previous years).

Random breath and drug testing

One in five active riders said they had been randomly breath tested (19%). Only 2% of this group said they believed they had been through a random drug test.

Random breath testing was more common among those who rode more than 20% of the time compared to driving, those who commuted, and rode bikes with bigger engines (700cc+).

Almost all respondents said they had not ridden their motorcycle when they knew or thought they may have been over the limit (92%) with an additional 6% who said they did not drink at all. Among those who said they may be been over the limit when they had been riding some of the reasons included perhaps being over the limit due drinking the night before, only riding a short distance, or they had no other alternative transport (or did not want to leave their bike behind).

Motorcycle/scooter ownership

More than half of all respondents (56%) did not have a motorcycle at home. Approximately one in three reported having only one bike at home (30%) with one in five reporting they had 2-4 bikes at home (22%). A minority of respondents had five or more motorcycles at their home address (4%).

The most common type of bike active riders said they mainly rode was a road bike (64% of active riders mainly rode a road bike (65% vs. 60% in 2013). Fewer reported they mainly road an off-road/trail bike compared to 2013 (25% vs. 33% in 2013) with similar levels as reported in 2012 (23%). Eight percent (8%) of respondents rode a scooter (vs. 3% in 2013).

The most common brands were Yamaha, Honda, followed by Harley Davidson motorcycles with one in three active riders riding motorcycles manufactured between 2010-2014 (36%).

Forty percent (40%) reported they were considering purchasing a motorcycle in the future, with half intending to do so within the next 12 months. One in three were considering buying new bike (30%), 44% considering a used motorcycle with the remainder undecided (33%). The majority of those thinking of buying another bike were planning on buying a road bike (76%). Half of these respondents intended to look for Antilock Braking System (ABS) for their new bike (53%).

Protective motorcycle clothing

Most respondents said they owned at least one helmet, pair of riding gloves or boots, motorcycle jackets, pair of pants or a one piece riding suit (all owned by more than three quarters of active riders). The most common items of protective gear owned were helmets (99% owned at least one); and gloves (owned by 95%). Respondents were least likely to say they owned a pair of riding pants (22%) or a one piece suit (93%).

In total, 71% of active riders reported they had a complete set of protective gear. This has remained constant between 2012 and 2014. However, as in in previous years, ownership of an item of protective gear did not necessarily mean that it was worn every time they rode. Of note, motorcycle specific pants were only worn all the time by just over half of the active riders who owned them (56%).

Almost all respondents (95%) said they wore a motorcycle helmet all the time. Eight in ten respondents (80%) reported they wore gloves all the time. Riding jackets were worn all the time by 62% of respondents. Boots of any type were worn all the time by 66% of respondents. Riding pants were worn all the time less frequently – 46% reported they were worn all the time.

Two in three respondents (68%) said they wore either riding boots or other types of boots that cover the ankles all the time.

Looking at the number of items worn by active riders, two thirds (64%) of respondents said they wore three or more items all the time. This decreased to 37% for four or more items of protective wear. When looking at the number of items worn most or all the time, 86% of respondents reported they wore three or more items all or most of the time.

Motorcycle crash history

In comparing the results from 2012 to 2014, similar proportions of riders reported they had experienced a crash during their riding career (47% in 2014 vs. 46% in 2013). The location, and to whom the fault was attributed were also broadly similar, as was the proportion of respondents who received compensation as a result of this crash.

Half of those who had experienced a crash reported they required medical treatment as a result (50%). Only a minority (8%) reported that their most recent crash was in the last 12 months. Half of all those who had experienced a crash said it had happened more than 11 years ago (52%). With riders being skewed towards the older age groups, this suggests that crashes requiring medical treatment were more likely to happen in the earlier years of their riding careers.

Off road bikes made up one in three of the crashes that required medical attention (32%) – slightly but not significantly higher than the proportion who said they mainly rode an off-road bike (25%). Just over half of the crashes had occurred on an on-road bike (56%) with a higher representation of sports tourer bikes among those who had a crash requiring medical attention compared to 2013 (16% vs. 5%).

One in four of those who had crashed in an on-road environment reported that they had been at fault (25%) with one in three saying that another party was at fault (35%) and an additional 16% who said that fault could be attributed to the two parties. One in ten (11%) reported that no other vehicles were involved in the crash.

A third (30%) of respondents who had ever experienced a crash received compensation or income support as a result of injuries they had received due to a motorcycle crash – most (75%) of whom received this from the TAC.

Respondents' suggestions to the TAC

The most common theme related to improving the awareness of road users or providing education by providing training on motorcycle safety and road sharing (27%). Related to this were suggestions around developing awareness campaigns or continuing existing advertising campaigns relating to motorcycle safety (12%). Maintaining the roads, fixing defects, removing potholes and cleaning up after road works was mentioned by one in ten respondents.

Implications of the research

- While there were some differences in the broader motorcycle population including a higher proportion of active riders and a smaller cohort of off-road riders in 2014 compared to 2013, in 2014 the overall composition of riders was much more consistent with that in 2012. This suggests that the change in methodology was not a major factor in the population differences observed in 2013 as hypothesised as both 2013 and 2014 used identical data collection methods. Results among active riders were generally consistent over the three years of the survey.
- There was a relatively higher proportion of respondents who had returned to riding in 2014 compared to 2013. Therefore it is not surprising there lower agreement that returning riders should do a refresher course. While these types of courses may be supported in principle, the TAC should note there may be resistance from the target audience if such courses were to be mandated.
- Learning to ride on an off-road bike or in an off-road environment as a child was a common experience among respondents. There is an opportunity to perhaps work with parents who teach them or working with the off-road riding community to encourage good habits when riders are young such as promoting importance the use of protective gear in all riding environments, communicating messages such as the social *un*acceptability of not protecting yourself in an already risky pastime or basic motorcycle safety tips or skills that could be passed onto young riders.
- Wearing motorcycle pants remains an issue among active riders. Motorcycle pants were the least likely to be owned by respondents and even among those who owned them, just over half said they wore them every time they rode. In terms of behaviour change, the relatively lower ownership figures compared to other types of gear shows there are some capability and opportunity barriers (lack of ownership means riders are not wearing this type of protective clothing). However, the bigger challenges for agencies such as the TAC are the motivational and habitual barriers. Riders seemed to be more inclined to wear a complete set of gear for longer rides but found it inconvenient or uncomfortable to wear gear on shorter rides. While currently riders do have the freedom of choice as to whether or not to wear protective gear while riding, the TAC could consider communicating to riders that a little bit of effort is worth it in the end, particularly when it comes to wearing motorcycle pants. It is possible that riders underestimate the rate or extent of leg injuries among motorcycle crashes. Other opportunities include promoting alternative designs that perhaps are easy to put on and off or may appear or feel more like regular outerwear.
- Related to protective gear, the survey provides the TAC with a benchmark for the propensity for wearing boots of any kind in the early stages of making it mandatory to wear this type of footwear when riding. It is worthwhile monitoring any changes over time including whether there is a change in those who choose to wear boots of any sort over other types of footwear.
- Based on respondent feedback, the TAC should continue to spread the message about sharing roads and the promoting awareness of other road users among both drivers and motorcyclists. Advocating improvement of roads to the relevant authorities on behalf of motorcyclists would also be worthwhile and well received by the motorcycle riding community.

2. Research Context

2.1 Background to project

Transport Accident Commission objectives

The TAC's objectives under the Act include:

- reducing the cost to the Victorian community of compensation for transport accidents;
- reducing the incidence of transport accidents;
- providing suitable and just compensation in respect of persons injured or who die as a result of transport accidents in the most socially and economically appropriate manner;
- determining claims for compensation speedily and efficiently;
- providing suitable systems for the effective rehabilitation of persons injured as a result of transport accidents;
- managing the Transport Accident Scheme (Scheme) as effectively, efficiently and economically as possible; and
- ensuring the Scheme emphasises accident prevention and effective rehabilitation.

TAC Road Safety Motorcycle Research Program

Motorcycle rider attitudes and behaviours have been surveyed on an ad-hoc basis in recent years, generally as part of other surveys. In 2009, the TAC commissioned a survey to specifically track motorcycle rider attitudes and behaviours in relation to road safety issues, and to measure the prompted recall of motorcycle advertising campaigns when on air.

In since 2012, the Motorcycle Monitor Survey has been undertaken annually to gather detailed information about motorcycle riders, their attitudes toward road safety and their behaviour while riding their motorcycles with the intention to gain a fully representative sample of the motorcycle rider population.

Research objectives

The core aims of the study were to explore the characteristics of the Victorian motorcycle rider population in terms of their:

- general demographic characteristics;
- riding attitudes and behaviours; and
- attitudes toward motorcycle related road safety issues.

Specifically, the key issues included:

- how often motorcyclists ride;
- their riding activity and purpose;
- the types/number of bikes owned;
- awareness of motorcycle safety features; and
- attitudes and behaviour regarding risk taking and, protective gear.

Additional questions were also included in the 2014 survey to further explore how often people go off-road riding; questions into the types of boots worn by motorcyclists; circumstances of crashes; and perceptions of the road toll (specifically, the perception of the number of motorcyclists who died on Victorian roads in 2013).

3. Survey Design

Data collection method

The 2014 survey was administered using the same methodology used in 2013 with online, hardcopy and telephone options

All respondents were sent an invitation letter in the mail with details on how to complete the survey online or over the phone. A reminder letter including a hardcopy version of the survey was sent to those who had not completed the survey within 10 days of receiving the initial invitation.

Approximately 10 days after the reminder letters and hardcopy surveys were received; reminder calls were made to people who had not completed the survey. At this stage, potential participants were also offered the opportunity to complete the survey over the phone if they preferred to do so.

Overall, 2,301 of the motorcycle licence or registration holders in the sample received at least a letter by mail or a telephone call to invite them take part in the study. The remainder had either opted out of the survey, or were 'return to senders' where there was no valid phone number in which to contact them with a reminder call.

The Motorcycle Monitor 2012 was administered with a slightly different methodology, with an online survey with the option for participants to complete the survey via telephone if they preferred. No hardcopy option was included in 2012.

Fieldwork in 2014 was conducted from 10 June 2014 through to 31 July 2014.

Sampling

A random selection of 2,350 Victorians who had a motorcycle licence and/or a motorcycle registered in their name were invited to take part in the survey.

The sample included a booster of 350 Victorians who had either a Learners' or Probationary motorcycle licence.

The sample structure took into account anticipated participation rates for different rider groups but also allowed for enough sample to conduct analyses within key groups such as young male riders, and female riders. This was the same approach that was used to draw the sample in 2013.

Table 1: Key fieldwork figures

	n=	% of total mail-out
Mail-out 1 – Survey invitation	2,350	100%
Mail-out 2 – Survey reminder	2,120	90%
Reminder calls attempted	1,475	63%
Reminder calls completed	680	29%
TOTAL Survey completions online	**432**	**18%**
TOTAL Survey completions hardcopy	**304**	**13%**
TOTAL Survey completions by phone	**51**	**2%**
TOTAL completions	**787**	**33%**
Opt-outs	*2*	*0%*
Return to senders/unusable questionnaires	*65*	*3%*
Subtotal Out of scope (return to sender with no valid phone number)	*47*	*2%*
Hardcopy surveys received after closing date	*2*	*0%*

An analysis of the characteristics of hardcopy respondents vs. online respondents showed that those who completed the survey online tended to be younger (79% vs 61%. aged over 40); and more likely to live in metropolitan Melbourne (69% vs. 54% for hardcopy completions).

Other demographic differences between the people who completed the survey online vs. hardcopy or telephone tended to reflect age or location differences in the respective groups. For example 24% of those who completed the survey online were employed part time or casual vs. 13% of those who completed it via hardcopy or telephone.

Response rates

The overall response rate for the study was 33% compared to 30% in 2013.

There were 784 survey completions in total. More than half of respondents completed the survey online (55% or n=432). This compares to 63% who completed the survey online in 2013. We received 301 usable hardcopy returns (39%). Six percent of respondents (n=51) chose to complete the survey over the telephone. This compares to only 2% telephone completes in 2013.

Response rates tended to be higher among:

- those who were aged 40+ (41% vs. 27% of those aged 18-25);
- females (39% vs. 32% for males);
- those with full licences (38% vs. 25% for those with Ls or Ps);
- those with a registration *and* licence (40% vs. 30% of those with registration or licence only).

There is a slight difference between the profile of respondents in 2014 compared to 2013 and 2012 that should be noted by readers when considering the findings of this report relating to the riding history of respondents. In 2014, a *higher* proportion of respondents were classified as 'active riders' (defined as either currently riding occasionally or regularly without a break or returning to riding since being on a break) compared to 2013. Proportions of 'active riders' in 2014 are on par with those in 2012 (55% of respondents) suggesting that those who are more engaged in riding were more likely to take part in 2012 and 2014 compared to 2013.

Weighting

A weighting scheme was developed to realign the number of responses received so that the data would reflect the characteristics of the Victorian motorcyclist population and responses from oversampled sub-groups or groups with higher response rates were not overstated in the results.

The weighting scheme that was developed was based on motorcycle licence and registration population statistics from the VicRoads database extracted in June 2014 and took into account the following attributes:

- age;
- gender;
- location;
- licence type and; whether they had a registered motorcycle linked to their home address.

The following table compares the characteristics of the actual riding population in June 2014 compared to the number of surveys mailed out. The data was weighted to realign the number received to the proportion of these groups observed in the population for example, 33% of the mailing sample was sent to those with a learners or probationary licence. One in four returns received were from this cohort (24%), however this group only constitutes 7% of the motorcycling population, therefore the number of returns were 'weighted' down so that the proportion was in line with the proportion in the motorcycling population and their views were not over-represented in the results

Table 2: Sample attributes and population comparisons

Sample attributes and population figures	% of mail-out	% of completions (unweighted)	Population figures (%)
Registration and licence status			
Both registration and licence**	35%	42%	34%
Registration or licence only***	65%	58%	66%
Licence type			
Full motorcycle licence**	65%	75%	91%
Learner or probationary licence***	33%	24%	7%
No licence**	3%	1%	2%
Gender			
Female***	18%	21%	13%
Male**	82%	79%	87%
Age			
18-25**	38%	30%	7%
26-39**	28%	28%	26%
40+***	35%	42%	68%
Location			
Metropolitan Melbourne***	56%	54%	
Balance of Victoria**	44%	46%	

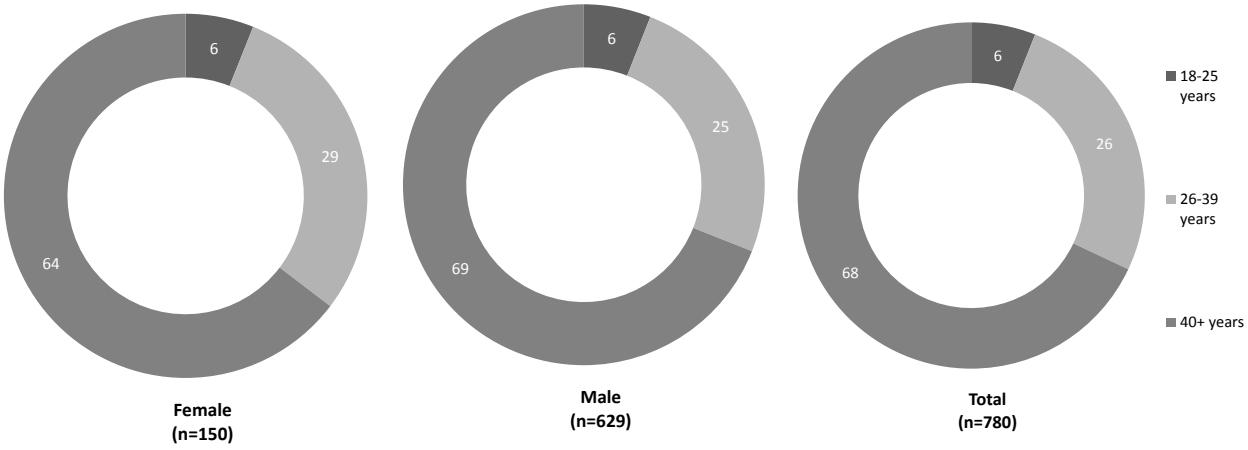
*** "weighted down" to be in line with the proportions in the population as mail-out higher than proportion in population (over-sampled)*

**** "weighted up" to be in line with the proportions in the population as mail-out lower than proportion in population (under-sampled)*

Note: Table based on attributes from sample file as of June 2013

Based on VicRoads data Victorian motorcyclists were predominately male (87%). They also tended to be skewed towards the older age brackets with 68% of motorcycle licence or registration holders aged 40 years plus. Over one in four respondents was aged between 26 and 39 years (26%) and a minority of licence and registration holders were aged under 25 (7%). These weighted figures for 2014 are shown in Figure 1 below.

Figure 1: Age and gender (weighted sample) – 2014



Q1 Age
Q2 Gender
Weighted sample; Base n = 780
Note: Figure based on reported age at time of survey and excludes those who did not provide an age

With the exception of the demographics in the appendix, the research results presented in this report are weighted to be representative of the whole motorcycle riding population rather than just those who completed the survey.

Limited analysis was also conducted to explore whether there were differences according to the sample data from the VicRoads database including variables such as the Socio Economic Index for Areas (SEIFA) quintiles based on the postcode of residence from the VicRoads data base.

This report also includes updated figures for the 2013 survey results due to revisions to the weighting scheme based on updated VicRoads database figures for the motorcycling population.

Reading this report

The 2013 data has been included in this report for illustrative purposes however, results are only statistically different where stated. Note that most questions in the hardcopy questionnaire were addressed to those who had ridden in the last 12 months. Where questions were asked of different rider groups between completion methods in 2014, the results in this report cover respondents common across all completion methods.

Tests of significance were conducted between key rider characteristics such as age, gender, riding purpose and ownership characteristics. These were conducted at the 95% level of confidence and are reported where appropriate.

A sample of n=784 enables us to be 95% confident that, at the overall level, a feature of the Victorian motorcycle rider population we are testing is within a range of ±3.5% of what the survey tells us. For example, this means that if we find that 50% of respondents said they had ridden a motorcycle in the last 12 months, we can be 95% confident that between 46.5% and 53.5% of the population represented by the sample actually did this.

A *'significant difference'* means we can be 95% confident the difference observed between the two samples reflects a true difference in the population of interest, and is not a result of chance. Such descriptions are not value judgements on the importance of the difference. The reader is encouraged to make a judgement as to whether the differences are 'meaningful' or not.

Where significance testing has occurred between pairs such as male vs. female riders this has been undertaken as an independent samples tests. However, where significance testing has occurred between more than two categories within a group e.g. main motorcycle type ridden (road bike, off-road bike; and scooter), the significance testing used tests one

category against the average of the others that are not in that category combined. Such a test is ideal for multiple comparisons as it reduces the likelihood of displaying a significant difference where one does not exist.

Statistically significant differences within tables are displayed by green (9↑) and red figures/arrows (2↓). Green figures indicate the figure reported is statistically higher; red indicate the figure is statistically lower.

Note that figures may not add up to 100% due to rounding or questions where multiple responses were allowed.

Research findings

4. Learning to ride

The following section covers details of when and how respondents learnt to ride. Overall, results were consistent to that in 2012 and 2013.

In comparing Motorcycle Monitor data on learning to ride in 2014 with 2013, there was no real difference in ages at which riders learned to ride or in who taught them to ride.

The majority of respondents held a full motorcycle licence (91%). A combined 7% had either a learner's or probationary licence. The average age that respondents got their motorcycle licence (excluding any time on their Ls) was 25.0 years old.

The average age respondents said they had learnt to ride was 18.8 years old. Males tended to start riding at an earlier age than females (18.1 compared to 24.8 years old). Recreational off-road riders were also more likely to start riding at an earlier age (35% started riding under the age of 11).

Respondents were most likely to say they were self-taught riders (46%). A further 20% reported they were taught by their parents. In comparison, 30% said they had been taught to ride by an accredited riding instructor. However, when asked specifically what, if any, rider courses they had attended, 56% said they had taken part in a motorcycle rider training course of some sort, suggesting that while a substantial proportion did attend these type of classes, it was not where they initially learnt to ride.

More than half of respondents reported they had first learnt to ride on an off-road bike (57%). This compares to only 25% of respondents who said they currently mainly ride an off-road bike.

The only notable change in 2014 related to whether people returning to riding should have to take training courses ; there was lower agreement in 2014 compared to 2013 (41% vs. 54%). However, when looking at riding history, it should be noted that in 2014, there has been an increase in those who had been on a break but had returned to riding compared to in 2013 (17% compared to 9%).

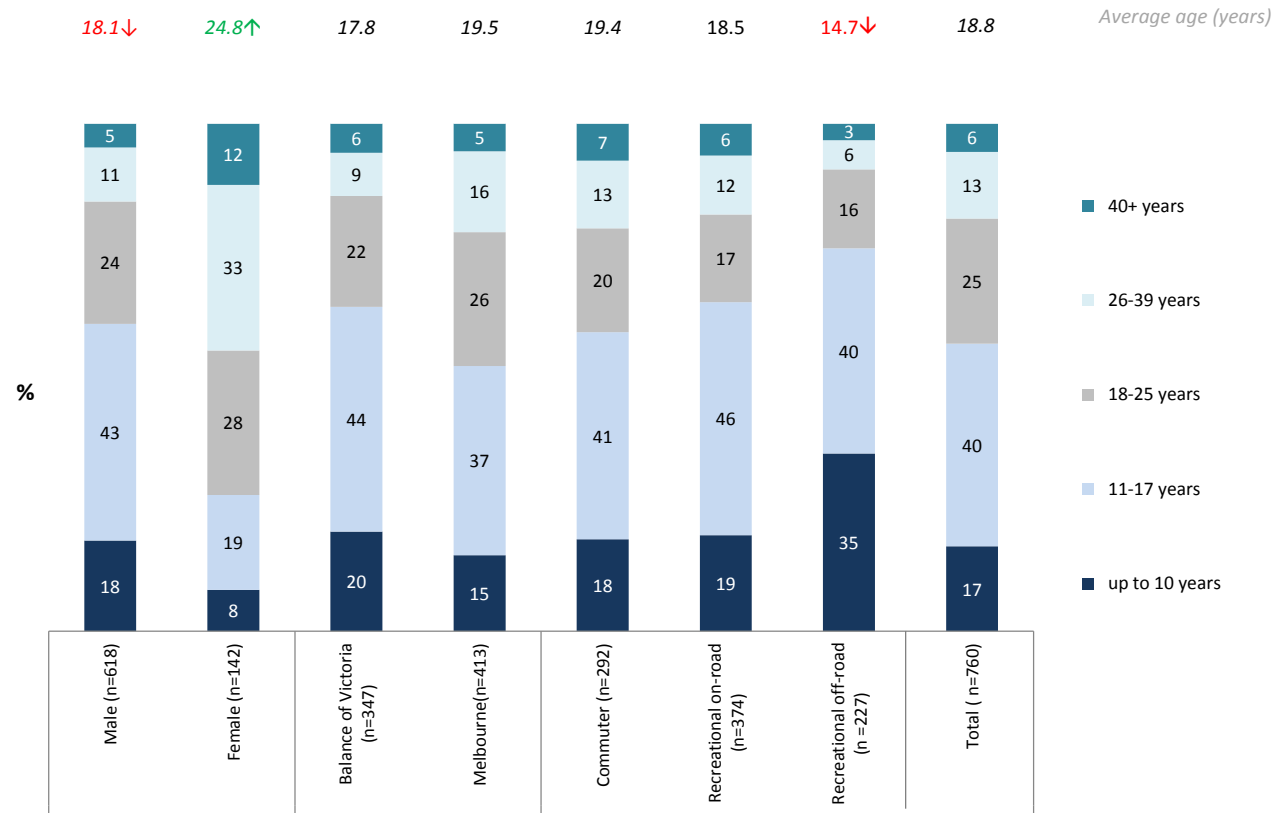
4.1 Age respondents started riding a motorcycle

On average, participants started riding a motorcycle at 18.8 years of age (unchanged compared to 2013). As was the case in 2013, respondents most likely learnt to ride between the ages of 11 and 17 (40%) with an additional 17% who reported they rode before the age of 10 years old. This was followed by a quarter of respondents (25%) who learnt to ride between the ages of 18 and 25.

As seen in Figure 2, and similar to 2013, women tended to be older than men when they first started to ride (24.8 vs. 18.1 years old for men). Notably, more than two in five (43%) male respondents said they first learnt to ride between the ages of 11-17 years. An additional 18% said they had learnt to ride before they were 11 years old.

Those living outside of metropolitan Melbourne tended to start riding at a younger age than those who lived in the city with one in five (20%) learning to ride under the age of 11.

Figure 2: Distribution and average age respondents started riding a motorcycle by selected rider characteristics – 2014 only



Q11. At what age did you start riding a motorcycle?
Total sample; Weighted sample; total n =760
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Note: Excludes those who had never ridden a motorcycle

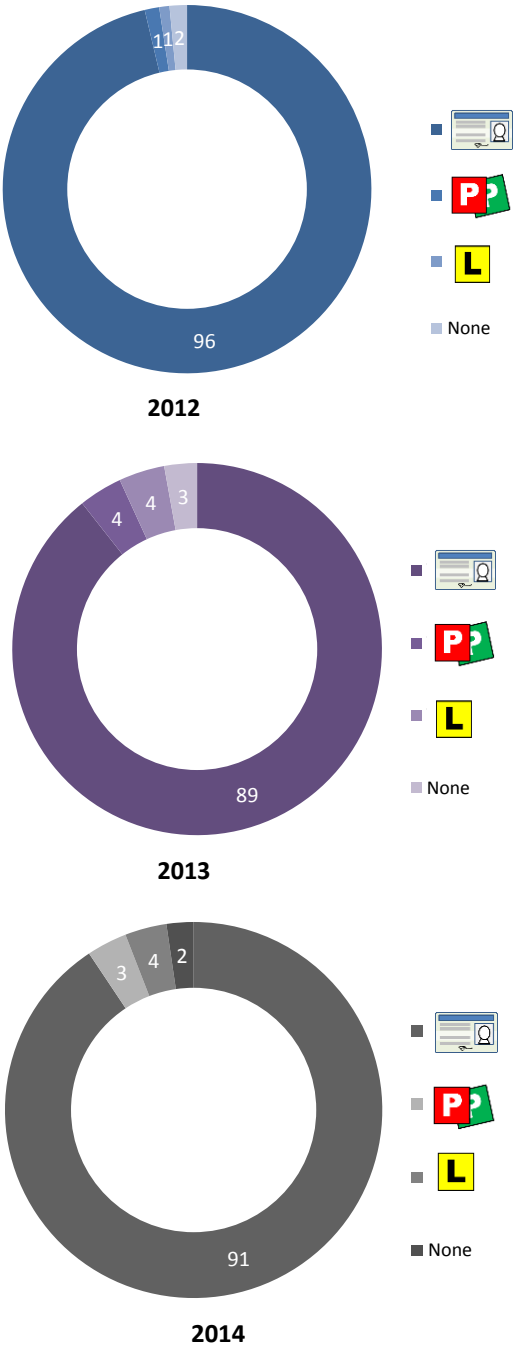
Recreational off-road riders were more likely to have started riding at a younger age (14.7 years) than those who rode for commuting purposes (19.4 years) or rode recreationally on-road (18.5 years). Notably, over a third of recreational off-road riders (35%) started to ride before they were ten years old, compared with only just over one in six commuters (18%) (See Figure 2).

Active riders were more likely than lapsed and former riders to have learnt to ride under the age of 11 (21% compared with 12% and 3% respectively). Conversely, those who were no longer riding and did not intend to do so in the future were more likely than active riders to have learnt to ride when they were between the ages of 18 and 25 (45% compared with 18%). This suggests that riding at a young age seems to be an influencing factor in continuing to ride as an adult as well as 'not giving up the dream'.

4.2 Motorcycle licence status

Based on VicRoads database of motorcycle licence holders extracted in April 2014, approximately 385,414 Victorians held a motorcycle licence. The vast majority of respondents in 2014 (91%) held a full motorcycle licence. Similar to 2013, approximately 7% (or approximately 13,775 Victorians) had either a learner's (4% unchanged) or probationary licence (3%). A minority of all respondents reported they did not have a motorcycle or scooter licence (i.e. they held a registration only) (2%).

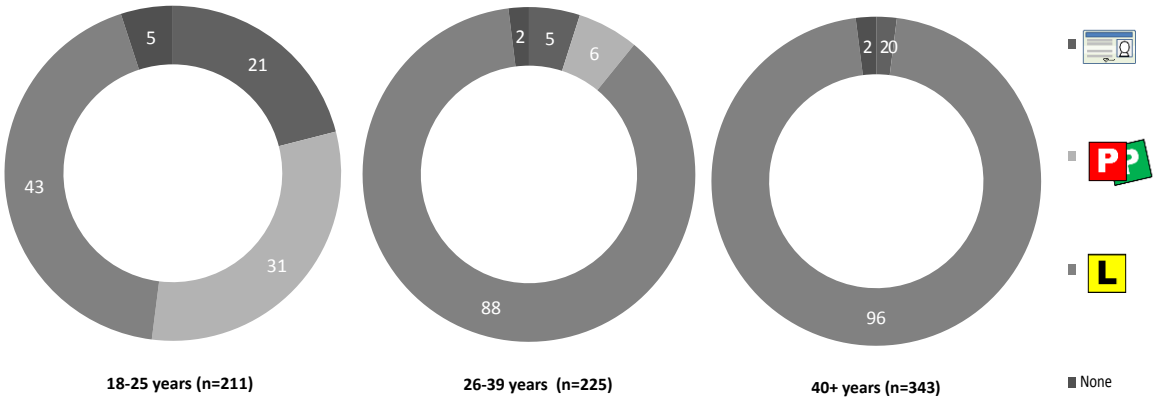
Figure 3: Motorcycle licence status - 2012-2014



Q4. Do you have a motorcycle licence?
Total sample; Weighted sample; 2012 base n = 548, 2013 base n=703; 2014 base n = 781

As expected, riders under the age of 26 were more likely to hold either a learner's permit or a probationary licence compared to other age groups (21% held a learners permit and 31% held a probationary licence) (See Figure 4).

Figure 4: Motorcycle licence status by age – 2014



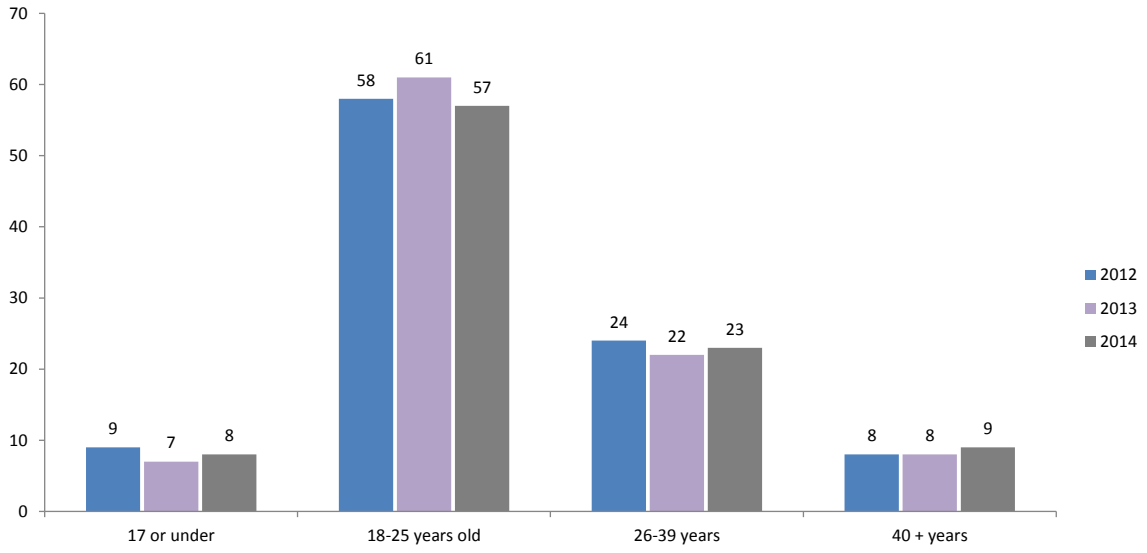
Q4. Do you have a motorcycle licence?
Total sample; Weighted sample; base n=781

4.3 Age motorcyclists applied for their licence

Full licence holders

On average, full licence and probationary licence holders first got their Ps or full motorcycle licence at 25.0 years. There were no significant differences between 2013 and 2014, with the majority of respondents saying that they were aged between 18 and 25 when they had first acquired their motorcycle licence (57% vs. 61% in 2013).

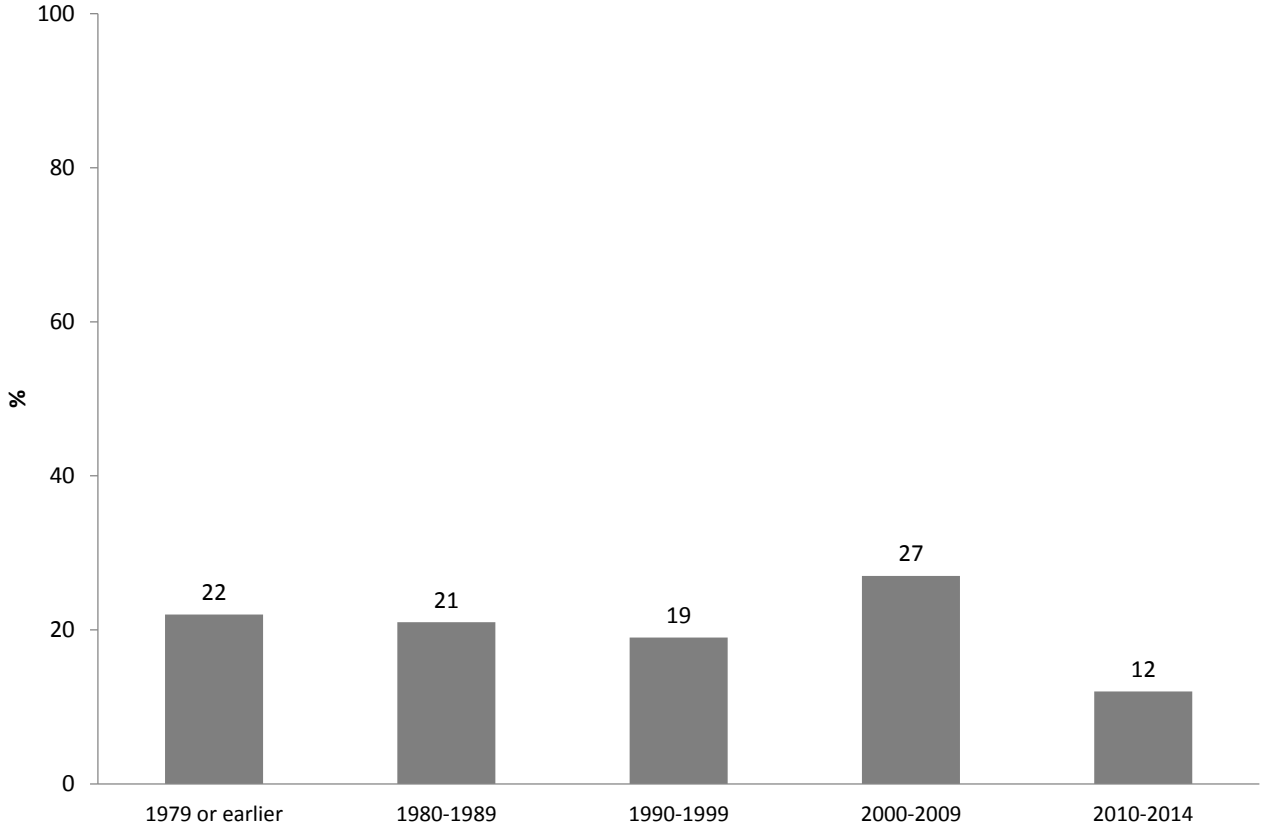
Figure 5: Age full/probationary licence holders got their licence (2012-2014)



Q5. How old were you when you got your motorcycle licence?
Filter: Full and probationary licence only; Weighted sample; 2012 base n = 501, 2013 base n=555, 2014 base n = 692

Just over one in ten respondents had applied for their motorcycle licence in the last four years (12%). Over a quarter (27%) had applied between 2000 and 2009. Approximately one in five had applied in each of the three decades prior to this (See Figure 6)

Figure 6: Year applied for licence (Full and probationary licence holders) 2014



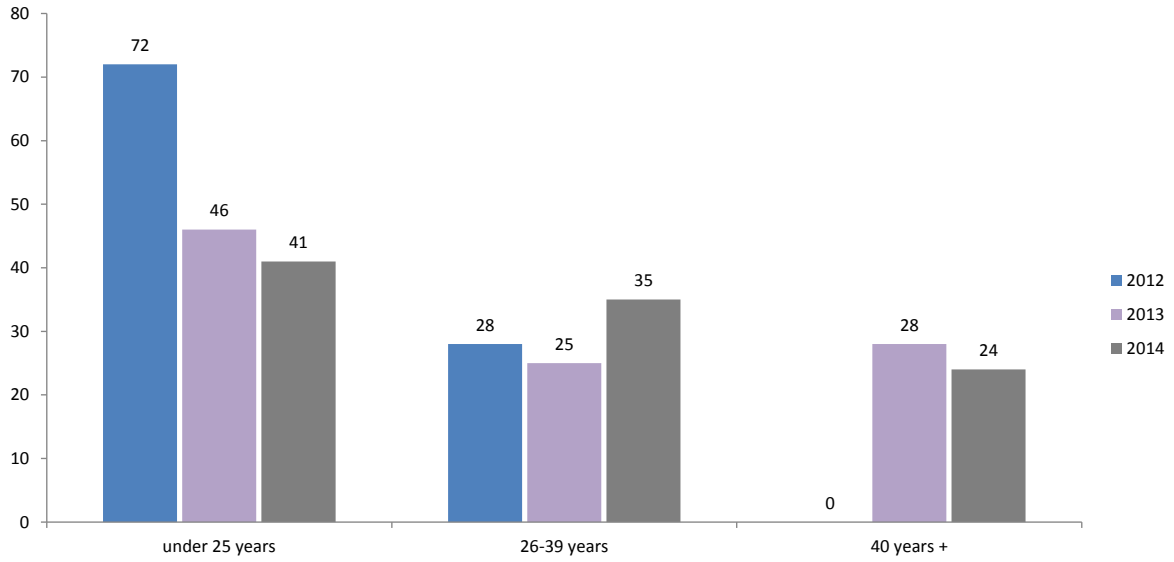
Q5. How old were you when you got your motorcycle licence?
Q1. Age
Filter: Full and probationary licence only; Weighted sample; 2014 base n=660 (excluding don't know and respondent error)

In terms of the gap between first learning to ride and eventually applying for a full/probationary licence, almost one in four reported that there was no gap – that they had learnt to ride in the same year as they applied for their licence (24%). Thirty-seven percent (37%) of full and probationary licence holders, learnt to ride one to five years before gaining their licence; and for one in three (37%) there was a gap of six years or more between first learning and applying for their licence.

Learner licence holders

Among the learner licence holders, the average age respondents applied for their licence was 32.1 years old. Just over four in ten of this cohort were between the ages of 18 and 25 (41%), followed by over one-third (35%) who were between the ages of 26 and 39. One quarter of respondents (24%) applied for their Ls when they were 40 years or older. The vast majority (91%) of current learner riders reported they had applied for their permit between 2012 and 2014.

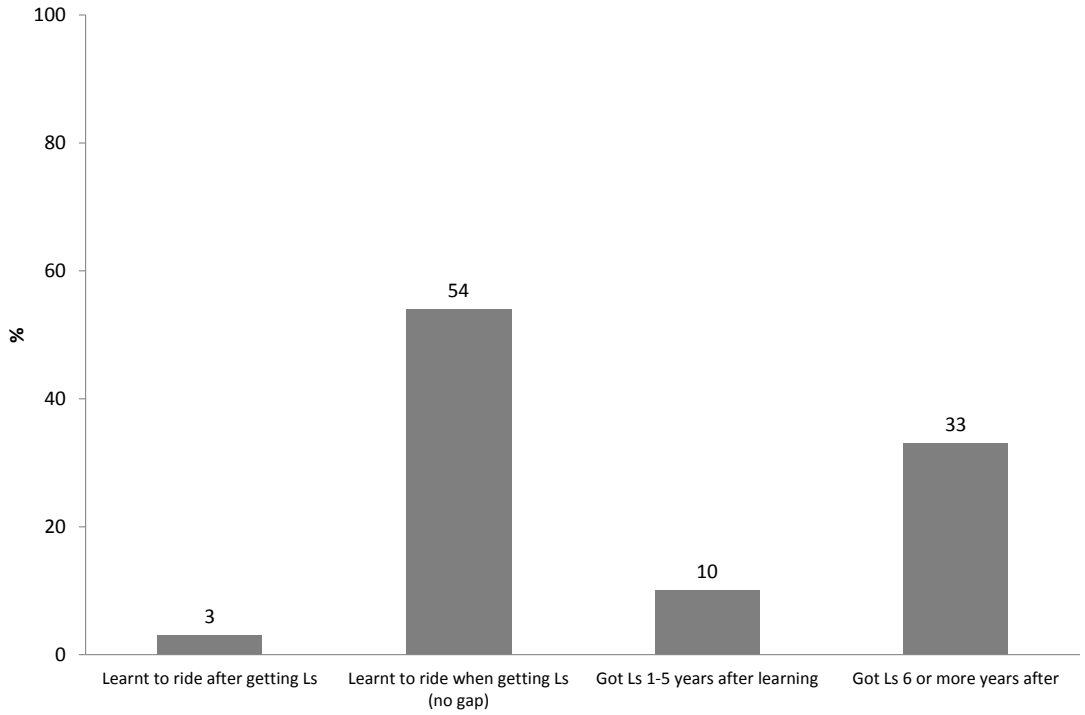
Figure 7: Age first got learners motorcycle licence (Learners only) - 2012 - 2014



Q6. How old were you when you got your learners licence?
Filter: Full and probationary licence only; Weighted sample; 2012 base n = 22, 2013 base n=117, 2014 base n = 79

Among L platers, the majority (54%) reported there was no gap between first learning to ride and getting their Ls. However, for some it was likely they had some riding experience prior to getting their Ls with 33% getting their Ls six years or more after they had first learnt to ride. For a further 10%, there had been a gap of one to five years between learning to ride and applying for their licence.

Figure 8: Gap between learning to ride and gaining learners licence (Learners only) - 2014



Q6. How old were you when you got your learners licence?
Q1 Age
Filter: Learners only; Weighted sample; base n=79

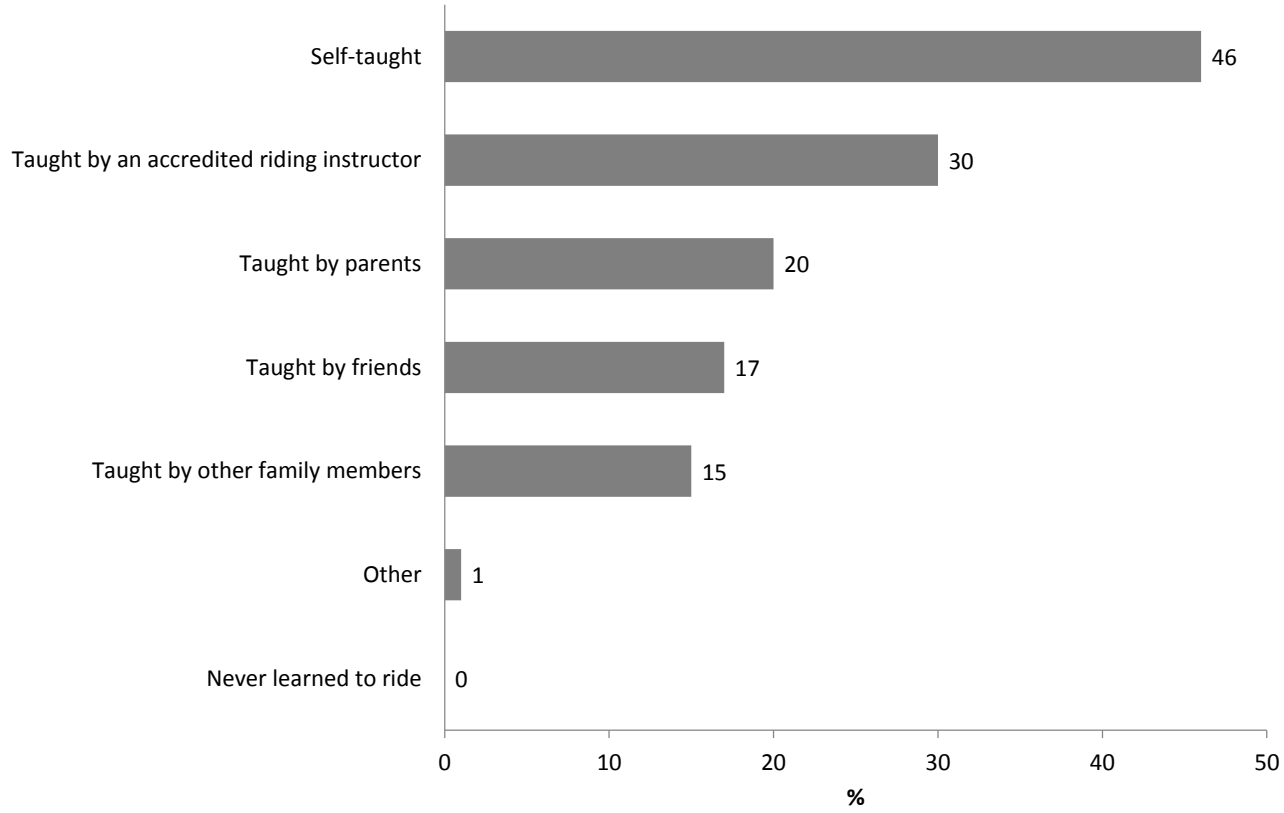
While the sample sizes for some sub-groups were small, learners aged 40+ were less likely to report a gap of one year or more between first learning to ride and actually getting their learner's licence (14% compared to 38% of those aged 39 and under and 48% of those aged 18-25). Learners who mainly rode an off-road bike were more likely to report a gap of at least a year (64%) compared to road bike and scooter riders (33% and 0% respectively).

4.4 Learning to ride

Who taught motorcyclists to ride

Similar to findings in the 2013 survey, most respondents in 2014 learnt to ride away from a riding or training school environment. Nearly half (46%) said they had taught themselves how to ride. Just under a third (30%) of riders were taught by an accredited riding instructor and one in five (20%) were taught by their parents. Further details of the types of rider training courses respondents had attended are covered in the subsequent section.

Figure 9: Who taught motorcyclists to ride - 2014



Q11b. Who taught you to ride a motorcycle?
Weighted; base n= 779;

At the overall level, respondents aged 40 or over were more likely to say they were self-taught than younger riders (52% vs. 35% for those aged 26-39 years and 37% for those aged 18-25 years).

Those in younger age groups were more likely to have been taught by an accredited riding instructor (40% of those aged 26-39 and 35% of those aged 18-25 years) or by their parents (30% of those aged 26-39 years and 41% of those aged 18-25 years).

Being taught by an accredited riding instructor tended to be more common among those who lived in Metropolitan Melbourne (36% compared to 18% of those who lived outside the city). Off-road recreational riders were more likely to be taught by their parents (32% vs. 19% of commuters and 21% of on-road recreational riders) (See Table 3).

Being taught by an accredited riding instructor was also less common among active riders (25% vs. 35% of lapsed and 38% of former riders).

Table 3: Who taught motorcyclists to ride by demographic characteristics - 2014

Column %	Gender		Age			Location		Total (n=779)
	Male (n=628)	Female (n=149)	18-25 (n=210)	26-39 (n=224)	40+ (n=341)	Balance of Victoria (n=355)	Melbourne (n=424)	
Self-taught	50↑	17↓	37↓	35↓	52↑	50	44	46
Taught by an accredited riding instructor	25↓	62↑	35	40↑	25↓	18↓	36↑	30
Taught by parents	20	17	41↑	30↑	15↓	24	17	20
Taught by friends	16	22	12	16	18	17	17	17
Taught by other family members	13↓	24↑	16	13	15	16	13	15
Other	1	3	0	1	2	1	2	1
Never learnt to ride	0	0	0	0	0	0	0	0

Q11B. Who taught you to ride a motorcycle?
Total sample; Weighted sample; Base n = 779
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Respondents who learnt at a younger age were more likely to say they had been taught by their parents (63% of those who learnt at 10 years or younger). Other family members were also more likely to have taught those who learnt when they were very young (24%) compared to those who learnt when they were older.

In contrast, those who had learnt when they were 18 or older were significantly more likely to have taught to ride by an accredited riding instructor (54% vs. 11% of those who learnt at 17 years or under) (See Table 4).

Table 4: Who taught motorcyclists to ride by age learnt to ride - 2014

%	Up to 10 years (n=159)	11-17 years (n=250)	18-25 years (n=231)	26-39 years (n=90)	40+ years (n=30)	Total (n=760)
Self-taught	34↓	54↑	55	34	27	47
Taught by an accredited riding instructor	9↓	11↓	39↑	73↑	78↑	30
Taught by parents	63↑	20	3↓	6↓	0↓	20
Taught by friends	14	24↑	12	15	1↓	17
Taught by other family members	24↑	17	8↓	10	13	15
Other	0	2	0	3	9↑	2

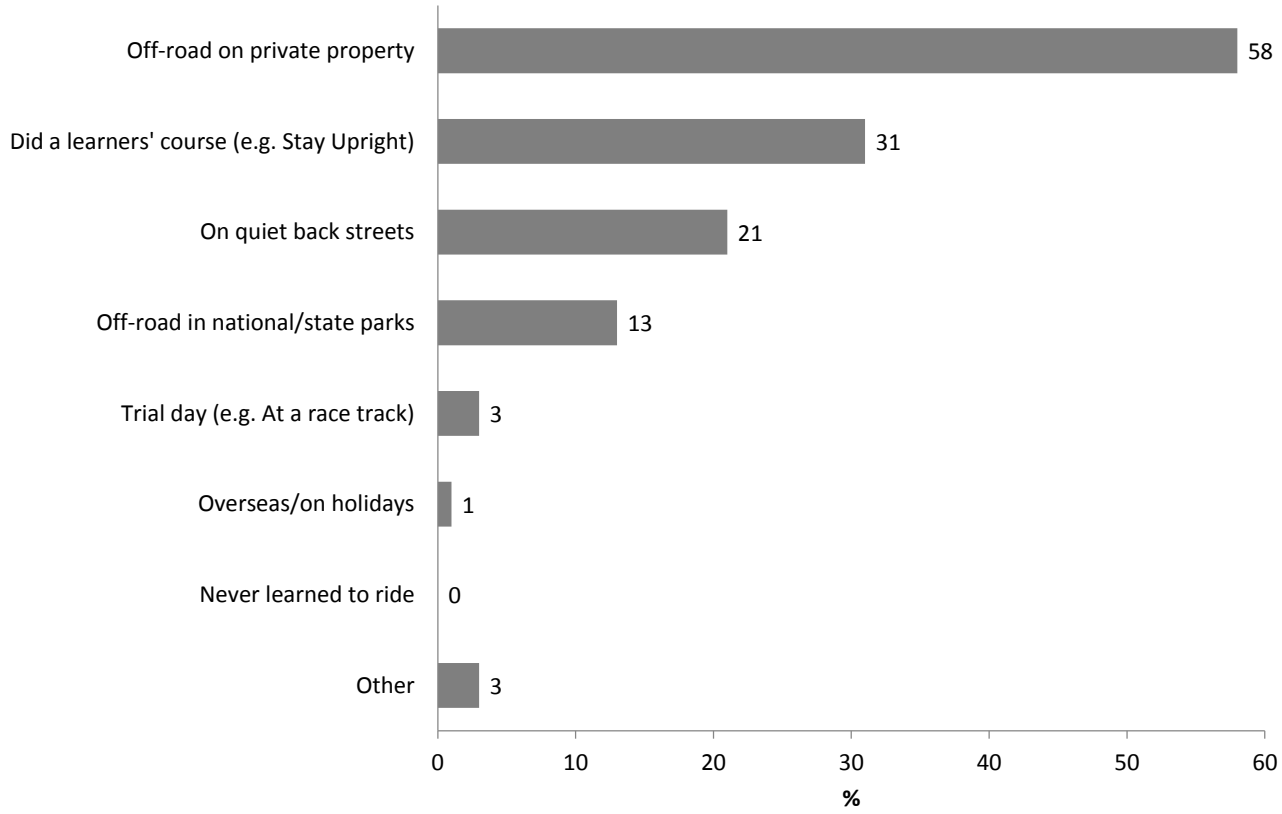
Q11B. Who taught you to ride a motorcycle?
Total sample; Weighted sample; Base n = 760
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

The above findings lead to suggest that a family connection and exposure to riding at a young age continue to be factors in riders choosing to ride as they become adults

Locations motorcyclists learnt to ride

In 2014, the majority of respondents (58%) learnt to ride off-road on private property, followed by just under a third (31%) who learnt at a learner's course (e.g. Stay Upright). Just over one in five (21%) said they had learnt on quiet back streets. These results remain unchanged from 2013.

Figure 10: Where leant to ride - 2014



Q11C. Where did you learn to ride?
Total sample; Weighted sample; Base n = 779

As shown in Table 5, males were more likely to learn off-road on private property and less likely to do a learner's course than females (61% for males vs. 41% for females and 27% vs. 61% for females respectively).

Similarly respondents from regional Victoria were more likely to learn off-road on private property and less likely to do a learner's course than those in Melbourne (71% vs. 51% learnt off-road on private property). Those who lived in Metropolitan Melbourne were more likely to say they had completed learner's course (18% vs. 39% of regional Victorian residents).

Not surprisingly, active riders (who were more likely to have learnt at a younger age) were more likely than lapsed riders to have learnt to ride off-road on private property (64% vs. 55%).

Table 5: Locations learnt to ride - by selected demographic variables - 2014

Column %	Gender		Age			Location	
	Male (n=628)	Female (n=149)	18-25 (n=210)	26-39 (n=224)	40+ (n=341)	Balance of Victoria (n=355)	Melbourne (n=424)
Off-road on private property	61↑	41↓	58	48↓	63↑	71↑	51↓
Did a learners' course (e.g. Stay Upright)	27↓	61↑	40↑	48↑	24↓	18↓	39↑
On quiet back streets	19↓	37↑	17	15	23↑	20	21
Off-road in national/state parks	14↑	6↓	15	13	13	11	14
Trial day (e.g. At a race track)	3	3	8↑	2	3	2	4
Overseas/on holidays	1	0	0	1	1	0↓	2↑
Other	3	1	2	3	3	2	4

Q11C.Where did you learn to ride?
Multiple responses accepted
Total sample; Weighted sample; Base n =779
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Those who were more likely to report they had learnt off-road on private property included those who had been taught by their parents (89%), friends (77%) or other family members (71%). Close to two in three (63%) of those who taught themselves to ride also learnt off-road on private property. Almost one in three (29%) who were self-taught said they had learnt to ride on quiet back streets and 15% of self-taught riders said they had learnt off-road in national/state parks.

Table 6: Where did you learn to ride by who taught by

Column %	Self-taught (n=324)	Taught by an accredited riding instructor (n=247)	Taught by parents (n=202)	Taught by friends (n=128)	Taught by other family members (n=117)
Off-road on private property	63	30↓	89↑	77↑	71↑
Did a learners' course (e.g. Stay Upright)	21↓	87↑	17↓	23	24
On quiet back streets	29↑	18	12↓	27	21
Off-road in national/state parks	15	6↓	10	19	18
Trial day (e.g. At a race track)	4	6	6	11↑	6
Overseas/on holidays	2	2	0	0	0
Other	4	3	2	0	1

Q11C.Where did you learn to ride?
Total sample; Weighted sample; Base n =779
Multiple responses accepted
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Looking at the age when people learnt to ride (Table 6) almost all those who had learnt as children (under 11 years old) learnt off-road on private property (87%). Three in four (74%) of those who learnt between 11-17 years old also reported they had learnt off-road on private property. Those who learnt to ride when they were 18 or older were more likely to say they learnt at a dedicated learners' course (57% compared to 10% who said they learnt when they were younger than this). Those who learnt when they were aged 18-25 were most likely to say they had learnt in quiet back streets (30%).

Table 7: Where did you learn to ride by age learnt to ride

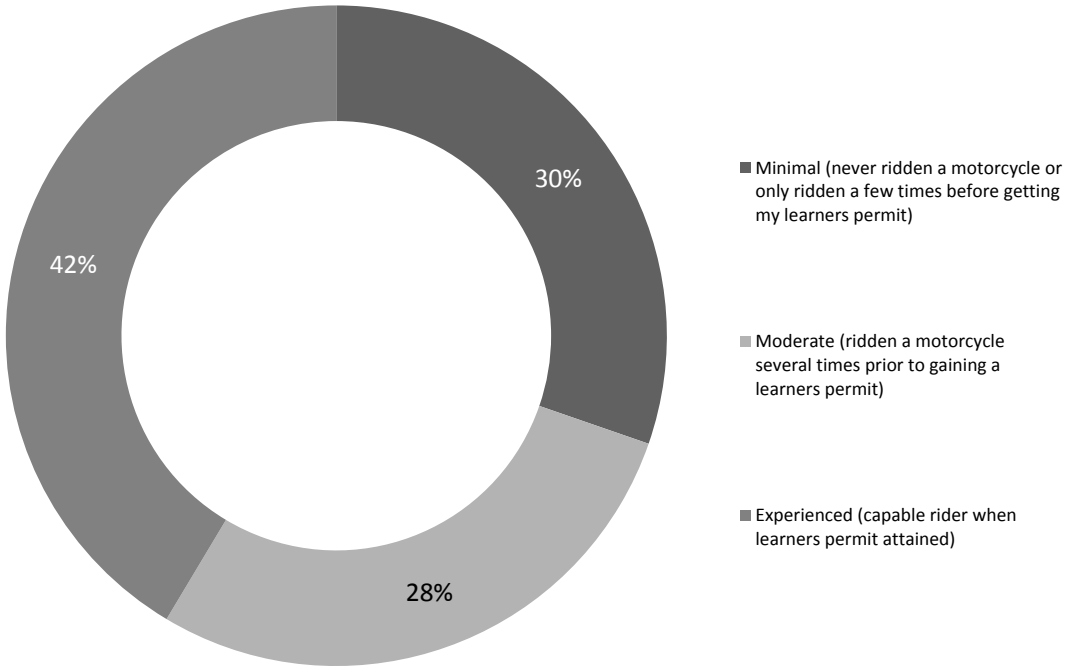
Column %	Up to 10 years (n=167)	11-17 years (n=252)	18-25 years (n=234)	26-39 years (n=94)	40+ years (n=32)	Total (n=779)
Did a learners' course (e.g. Stay Upright)	8↓	11↓	40↑	79↑	79↑	31
Trial day (e.g. At a race track)	5	3	1↓	7	1	3
Off-road in national/state parks	18	16	10	4↓	10	13
Off-road on private property	87↑	74↑	34↓	26↓	46	58
On quiet back streets	10↓	21	30↑	19	13	21
Overseas/on holidays	0	0	4↑	1	0	1
Other	2	2	6↑	1	0	3

Q11C.Where did you learn to ride?
Total sample; Weighted sample; Base n =779
Multiple responses accepted
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Riding experience prior to gaining learner licence

When asked how they would describe their riding experience prior to gaining their motorcycle learners' permit, respondents' levels of experience varied. Respondents were most likely (41%) to indicate they were experienced (i.e. a capable rider when they attained their learners' permit), followed by just under a third (30%) who indicated their experience was minimal i.e. had never ridden a motorcycle or only ridden a few times before getting their learners' permit. Just over one in four (28%) described their skills as moderate (having ridden a motorcycle several times prior to gaining their learners).

Figure 11: Riding experience prior to gaining a learner's permit - 2014



Q11D How would you describe your riding experience prior to gaining your motorcycle learner's permit?
Total sample; Weighted sample; Base n =770
Excludes those who never learnt to ride

As seen in Table 8 and Table 9, those more likely to say they had minimal experience were:

- female riders (62% vs. 26% of males);
- those from Melbourne (36% vs. 22% of those from regional Victoria), and
- commuters (31% vs. 14% of recreational off-road riders).

Table 8: Riding experience prior to gaining a learner's permit gender and location

Column %	Gender		Location	
	Male (n=621)	**Female (n=147)**	**Balance of Victoria (n=350)**	**Melbourne (n=420)**
Minimal experience (never ridden a motorcycle or only ridden a few times before getting learners permit)	26↓	62↑	22↓	36↑
Moderate experience (ridden a motorcycle several times prior to gaining learners permit)	29	27	26	30
Experienced (capable rider when learners permit attained)	45↑	11↓	52↑	35↓

Q11D How would you describe your riding experience prior to gaining your motorcycle learner's permit?
Total sample; Weighted sample; Base n =770
Excludes those who never learnt to ride
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Table 9: Riding experience prior to gaining a learner's permit by rider type

Column %	Riding activity segments			Riding purpose (Active riders)		
	Active riders (n=508)	Lapsed riders (n=226)	Former riders (n=31)	Commuter (n=293)	Rec. on-road rider (n=375)	Rec. off-road rider (n=231)
Minimal experience (never ridden a motorcycle or only ridden a few times before getting learners permit)	25↓	32	66↑	31↑	27	14↓
Moderate experience (ridden a motorcycle several times prior to gaining learners permit)	25	35↑	19	30	24	22
Experienced (capable rider when learners permit attained)	50↑	33↓	16↓	39↓	48	64↑

Q11D How would you describe your riding experience prior to gaining your motorcycle learner's permit?
Total sample; Weighted sample; Base n =784
Excludes those who never learnt to ride
↓↑ *indicates statistically significant difference compared to respondents* ***not*** *in that category*

While the sample size was small, scooter riders were more likely to have minimal experience prior to getting their learners permit (52% vs. 9% of riders whose main bike was an off road bike/trail bike or 31% of those who mainly rode a road bike) (Table 10).

Table 10: Riding experience prior to gaining a learner's permit by rider type

Column %	Type of bike (main bike)		
	Off road bike/ trail bike (n=141)	Road bike (n=311)	Scooter (n=44)*
Minimal experience (never ridden a motorcycle or only ridden a few times before getting learners permit)	9↓	31	52↑
Moderate experience (ridden a motorcycle several times prior to gaining learners permit)	26	25	25
Experienced (capable rider when learners permit attained)	64↑	44↓	23↓

Q11D How would you describe your riding experience prior to gaining your motorcycle learner's permit?
Active riders only; Weighted sample; Base n =784
Excludes those who never learnt to ride
↓↑ *indicates statistically significant difference compared to respondents* ***not*** *in that category*
**Note small sample sizes*

Respondents who had learnt to ride as children were significantly more likely to say they felt they were experienced riders by the time they attained their learners' permit (77% of those who learn at the age of 10 or younger, and 55% of those who learnt between 11 and 17 years old). Half (49%) of those who learnt between the ages of 18 and 25 reported they had minimal experience (Table 11).

Table 11: Riding experience prior to gaining a learner's permit by age learnt to ride

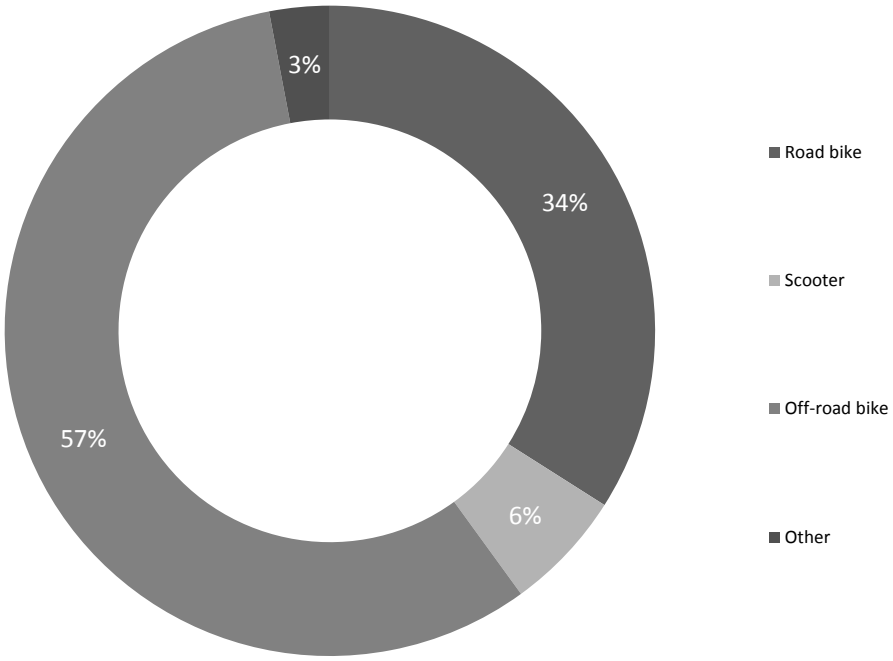
Column %	Up to 10 years old (n=163)	11-17 years old (n=249)	18-25 years old (n=232)	26-39 years (n=94)	40+ years (n=32)
Minimal (never ridden a motorcycle or only ridden a few times before getting my learners permit)	2↓	14↓	49↑	68↑	55↑
Moderate (ridden a motorcycle several times prior to gaining a learners permit)	21↓	31↑	27	24	45↓
Experienced (capable rider when learners permit attained)	77↑	55↑	23↓	8↓	0↓

Q11D How would you describe your riding experience prior to gaining your motorcycle learner's permit?
Q11. At what age did you start riding a motorcycle?
Total sample; Weighted sample; Base n =770
Excludes those who never learnt to ride
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Type of bikes motorcyclists learnt to ride on

Over half of respondents (57%) first learnt to ride on an off-road bike, followed by 34% who had learnt on a road bike. A minority reported having first learnt to ride on a scooter (6%).

Figure 12: Type of motorcycle learnt to ride on - 2014 only



Q11E What kind of motorcycle did you first learn to ride on?
Total sample; Weighted sample; Base n = 772

Females were more likely to have learnt to ride on a road bike than males (58% vs. 31%) and less likely to have learnt on an off-road bike (32% vs. 61% of males).

A particularly high proportion of active riders and those who were aged 18-25 reported first learning to ride on an off-road bike (64% and 67% respectively).

Consistent with findings about where respondents learnt to ride, those who learnt at a younger age were significantly more likely to have learnt on an off-road bike (87% of those who learnt at 10 years or younger and 65% of those who learnt between the ages of 11-17 years old). Road bikes were more common amongst those who had learnt when they were 18 or older (52%) (Table 12).

Table 12: Type of motorcycle learnt to ride on by age learnt to ride

Column %	Up to 10 years (n=162)	11-17 years (n=251)	18-25 years (n=233)	26-39 years (n=94)	40+ years (n=32)	Total (n=772)
Road bike	3↓	28↓	54↑	52↑	43	34
Scooter	6	5	3	13↑	11	6
Off-road bike	87↑	65↑	42↓	30↓	46	57
Other	5	3	1	5	0	3

Q11E What kind of motorcycle did you first learn to ride on?
Total sample; Weighted sample; Base n =772
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Rider training courses

As in 2013, the proportion of respondents in 2014 who indicated they were taught to ride by an accredited riding instructor/by doing a learners' course was lower compared with the aggregate proportions nominated by respondents from a specific list of courses (listed in Table 14 below). In 2014, while 30% said they were taught to ride by an accredited instructor, a total of 56% reported having undertaken some sort of formal training when asked which specific rider training courses they had attended. This suggests that while they had attended a course, this was not where they had learnt to ride.

Overall, in 2014, one in three mentioned that they specifically went to a learners' course e.g. Stay Upright (33% vs. 37% in 2013). A HART course was mentioned by 17% of respondents in 2014. Five percent (5%) specifically mentioned attending a DECA course and 8% had reported attending an advanced rider training course.

Table 13: Rider training courses attended - 2013 vs. 2014

	% 2013	% 2014
Learners' course (e.g. Stay Upright)	37	33
HART course	14	17
Track day riding courses	8	5
Advanced rider training	8	8
DECA course	7	5
Other	3	3
Australian Superbike School	3	1
None of the above	41	44
Subtotal - Attended rider training course	*59*	*56*

Q13. Have you ever done any of the following motorcycle rider training courses?
Total sample; Weighted sample; 2013 - Base n = 692, 2014 - Base n=779
Multiple responses accepted
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

As Table 14 shows, female riders were more likely than males to have attended a formal training course (75%). A high proportion of 26-39 year olds were also likely to have undertaken a riding course compared with those aged 40 or older (78% vs. 46%).

Table 14: Rider training courses attended by selected demographic variables - 2014

Column %	Gender		Age			Location		Total (n=783)
	Male (n=630)	Female (n=151)	18-25 (n=211)	26-39 (n=226)	40+ (n=342)	Balance of Victoria (n=357)	Melbourne (n=426)	
Subtotal - Attended rider training course	53↓	75↑	68↑	78↑	46↓	43↓	63↑	56
Learners' course (e.g. Stay Upright)	31↓	47↑	50↑	49↑	25↓	25↓	37↑	33
HART course	15↓	29↑	11	25↑	15↓	6↓	23↑	17
DECA course	5	8	11↑	7	4	11↑	2↓	5
Track day riding courses	5	3	4	6	4	2↓	6↑	5
Advanced rider training	7	9	6	8	8	4↓	10↑	8
Australian Superbike School	1↑	0↓	2	1	1	0	2	1
Other	3	4	2	1	4	2	4	3
None of the above	46↑	24↓	29↓	22↓	53↑	57↑	36↓	44

Q13. Have you ever done any of the following motorcycle rider training courses?
Total sample; Weighted sample; Base n = 783
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Half (50%) of those who had experienced a crash in the past had undertaken a rider training course of some sort. Those aged between 26-39 years and had experienced a crash were significantly more likely to have attended a rider training course than those aged 40+ who had also experienced a crash, as seen below in Table 15. This is likely to be a reflection of younger riders being more likely to have attended a course of some sort, and courses, particularly for learners, becoming more common in recent years (See Figure 13).

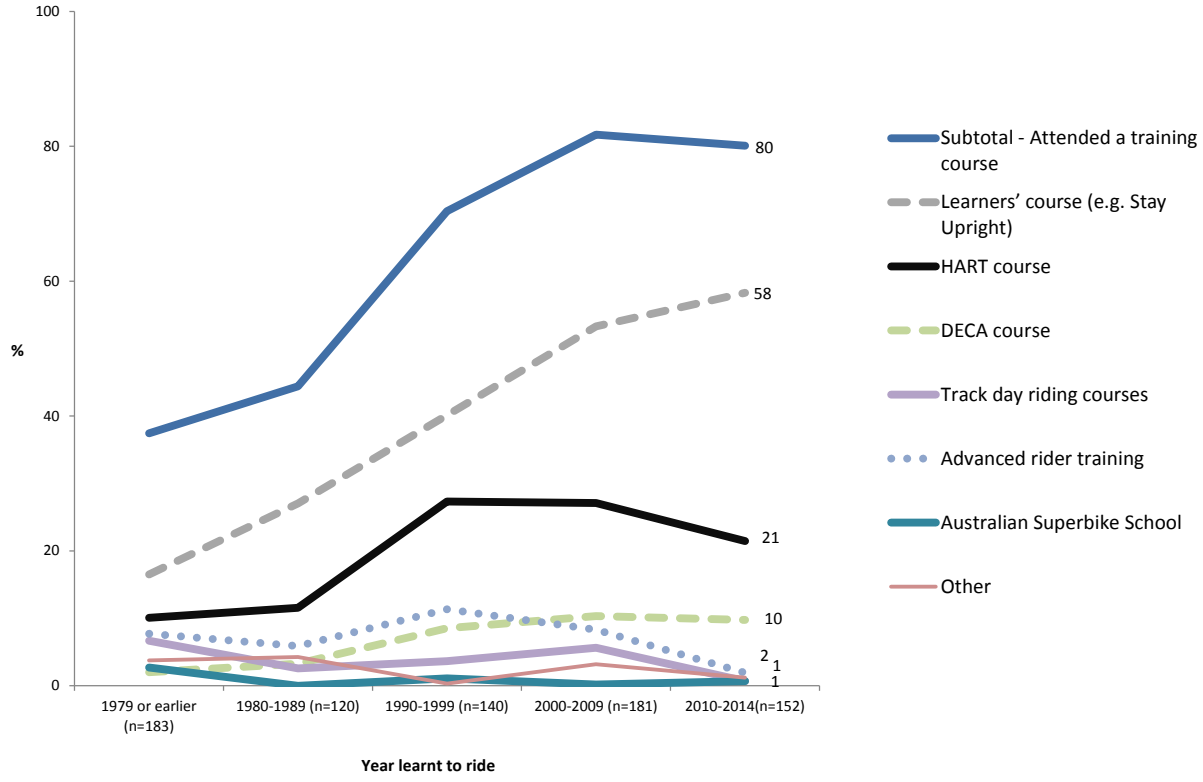
Table 15: Crash involvement among those who had or had not undertaken rider training

Column %	Involved in crash by age			TOTAL (n=310)
	18-25 (n=72)	26-39 (n=85)	40+ (n=152)	
Attended rider training course	63	75↑	41↓	50
Did not attend riding training course	36	25↓	59↑	50

Q13. Have you ever done any of the following motorcycle rider training courses?
Q56 Have you ever had a crash while riding a motorcycle?
Filter: Experienced a crash; Weighted sample; Base n = 310
↓↑ *indicates statistically significant difference between those who attended a riding training course or not*

Eight in ten (80%) respondents who obtained their licence from 2010 to 2014 reported they had attended a training course of some sort (See Figure 13).

Figure 13: Rider training courses attended by year full licence attained



Q13. Have you ever done any of the following motorcycle rider training courses? By year first learnt to ride
Total sample; Weighted sample; Base n = 778

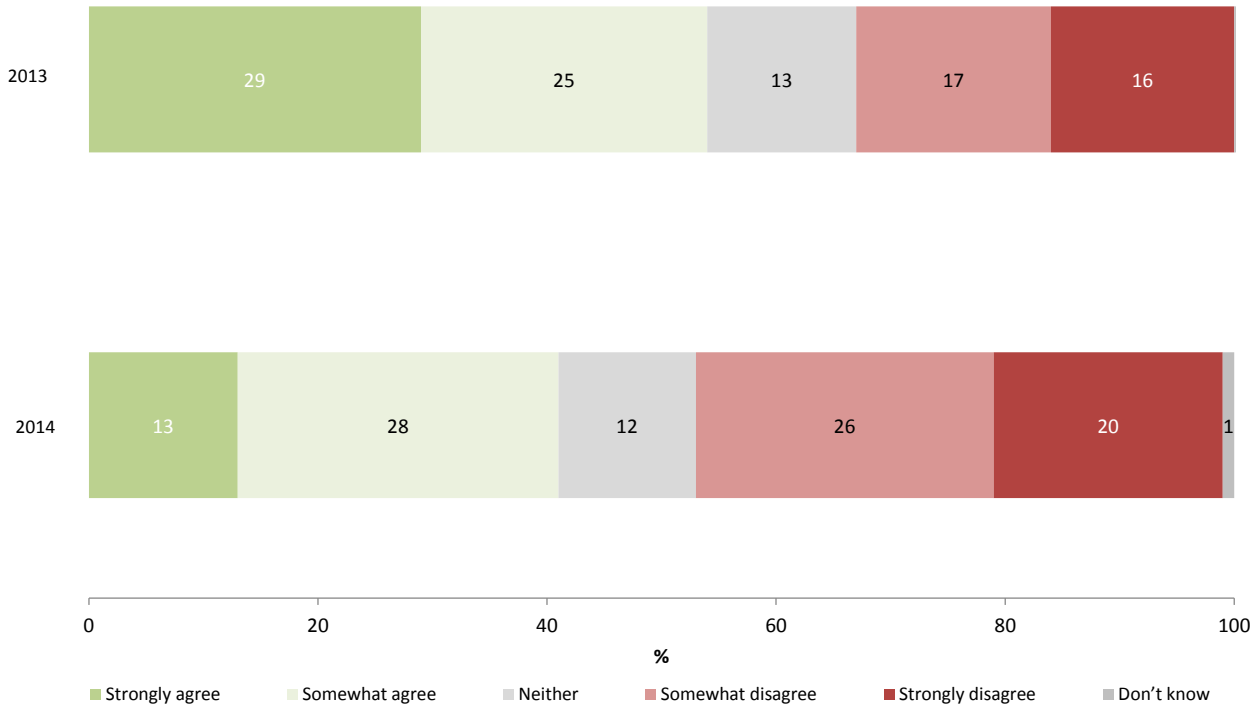
Attitudes towards riding training courses after a break

Respondents were asked their views on training courses for those who had had a break from riding. While respondents tended to agree that people returning to riding after a break should have to undertake a motorcycle training course, there was a decrease in 2014 with two-fifths (41%) of respondents agreeing strongly or somewhat (compared to 54% in 2013). However, when looking at riding history, it should be noted that there has been an increase in those who had been on a break but had returned to riding in 2014 compared to 2013 (17% compared to 9%) (See Section 5.1).

Recreational off-road riders were significantly more likely to *strongly disagree* (26%) returning riders should undertake a training course compared to recreational on-road riders (17%) or commuters (16%). Similarly, looking at the type of bike itself, those who mainly rode an off-road bike/trail bike were significantly more likely to be opposed to this with 27% strongly disagreeing compared to 15% and 16% of road bike and scooter owners respectively.

There were no differences in opinion in terms of age, gender or place of residence.

Figure 14: Agree/disagree: People returning to riding after a break should have to undertake a motorcycle training course – 2013 vs. 2014



Q55h. Agree/disagree: 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; 2014 Base n =572; 2013 Base n=491

5. Riding activity

This section covers riding activity including recent riding behaviour, riding history and reasons for riding.

As with the previous surveys, the majority of respondents had ridden a motorcycle in the last 12 months (62% in 2014 compared to similar proportions in 2013 at 57%). Those aged 18-25 were more likely to have done so than those who were older (90% of 18-25 year olds had ridden in the last year). No longer owning a motorcycle, family commitments and/or changes in lifestyle were the most common reasons for not riding in the last 12 months. Those who had stopped riding, on average, did so at the age of 36 years old.

In comparing riding activity of respondents between in 2013 and 2014, there was a significant increase in respondents who were actively riding – on par with proportions in 2012 (55% in 2014, vs. 42% in 2013 vs. 55% in 2012) with the overall mix of riding activity similar to that in 2012. With the increase in those actively riding in 2014, there was a corresponding decrease in those classified as *former riders* (5% vs. 10% in 2013) or *lapsed* riders (40% vs. 48% in 2013) (i.e. those who had stopped riding and did not intend to ride in the future or they had stopped riding but may decide to ride again in the future respectively). Lapsed riders tended to report a high likelihood of getting on the bike again (with 56% providing a 7-10 out of 10 on a 0-10 likelihood scale).

Recreational on-road riding remained the most common riding purpose, with a lower number of respondents saying they rode recreationally off-road compared to 2014 (43% vs. 54% in 2013).

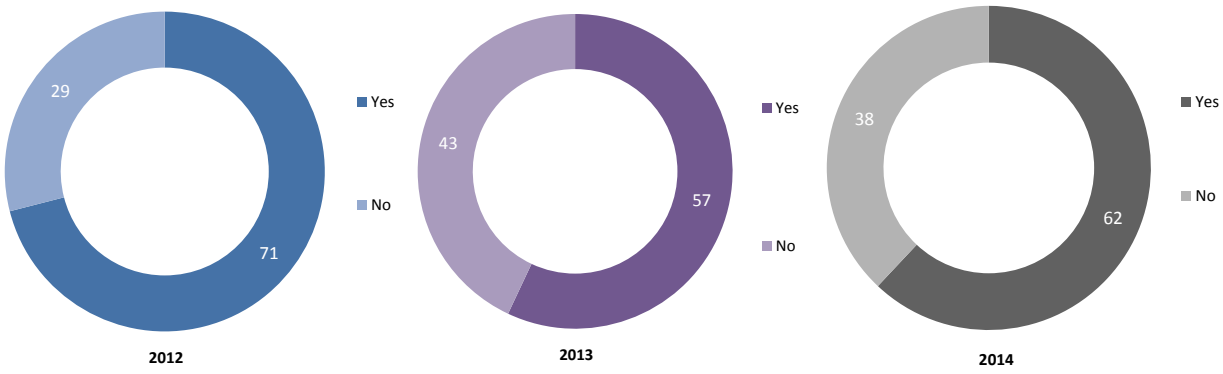
In 2014, around half of respondents said they had ridden up to an average of 500km in a month (56%). The average distance travelled per month was 416.4km per month or approximately 4996.4km in the last year.

5.1 Riding history

Riding activity in last 12 months

A similar proportion of respondents said they had ridden in the last 12 months in 2014 compared with 2013 (62% vs. 57%).

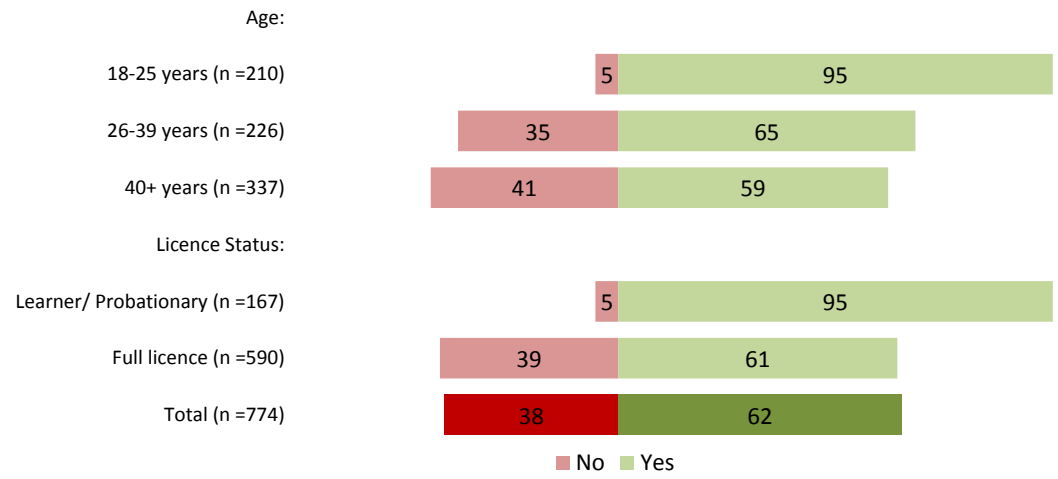
Figure 15: Whether ridden in last 12 months – 2012-2014



Q7 Have you ridden a motorcycle in the last 12 months (either on or off-road)?
Filter: excludes never ridden a motorcycle; Weighted sample; 2012 Base n =545; 2013 Base n = 694; 2014 base n = 777

Respondents aged 18-25 were most likely to have ridden in the last 12 months (95%). Two-thirds of respondents aged 26-39 also had ridden in the last 12 months (65%). A large proportion (95%) of those on their L or P plates also reported having ridden in the last 12 months.

Figure 16: Whether ridden in last 12 months by selected rider groups – 2014 only



Q7 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 = 777

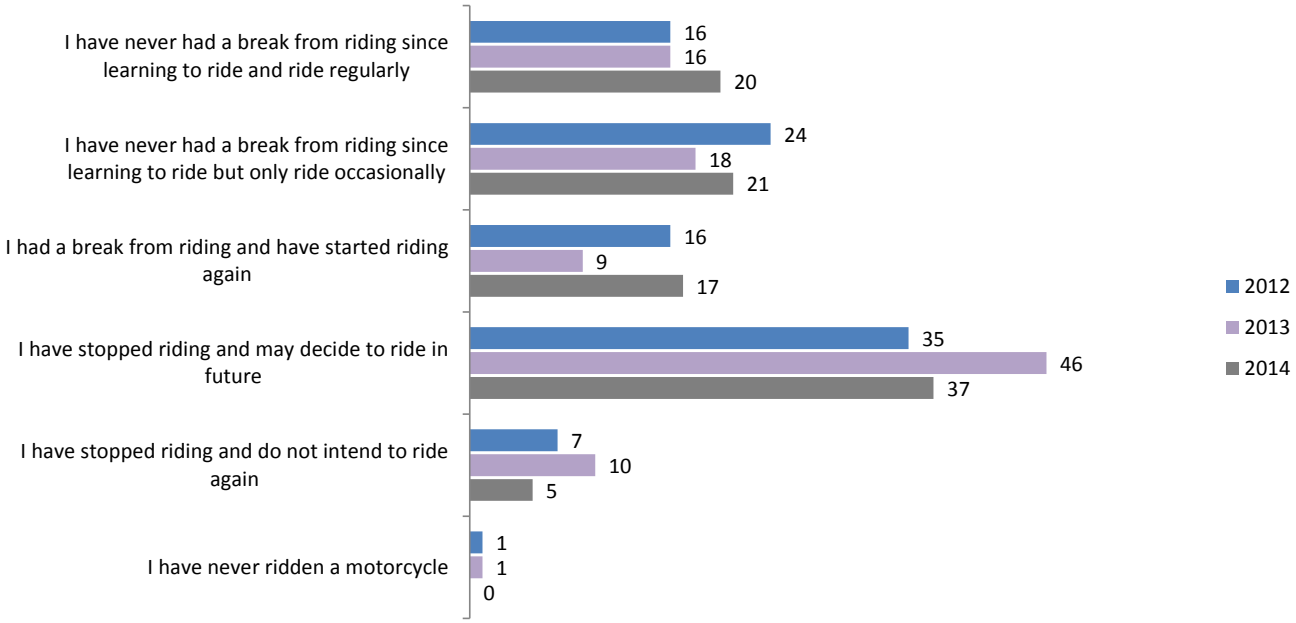
Riding history

In 2014, over half of respondents (58%) were either occasional or regular riders; or had returned to riding after a break compared to 43% in 2013 and 57% in 2012. Specifically, 20% reported they had *never had a break from riding since learning to ride and ride regularly* in 2014. Just over one in five (21%) had never had a break from riding since learning to ride but said they only ride occasionally.

As seen in Figure 17, respondents in 2014 were less likely to report they had stopped riding but may decide to ride in future (37% vs. 46% in 2013).

There was also a decrease in those who said they had stopped riding altogether and did not see themselves riding again in the future compared to 2013 (5% vs. 10% in 2013).

Figure 17: Riding history - 2012-2014



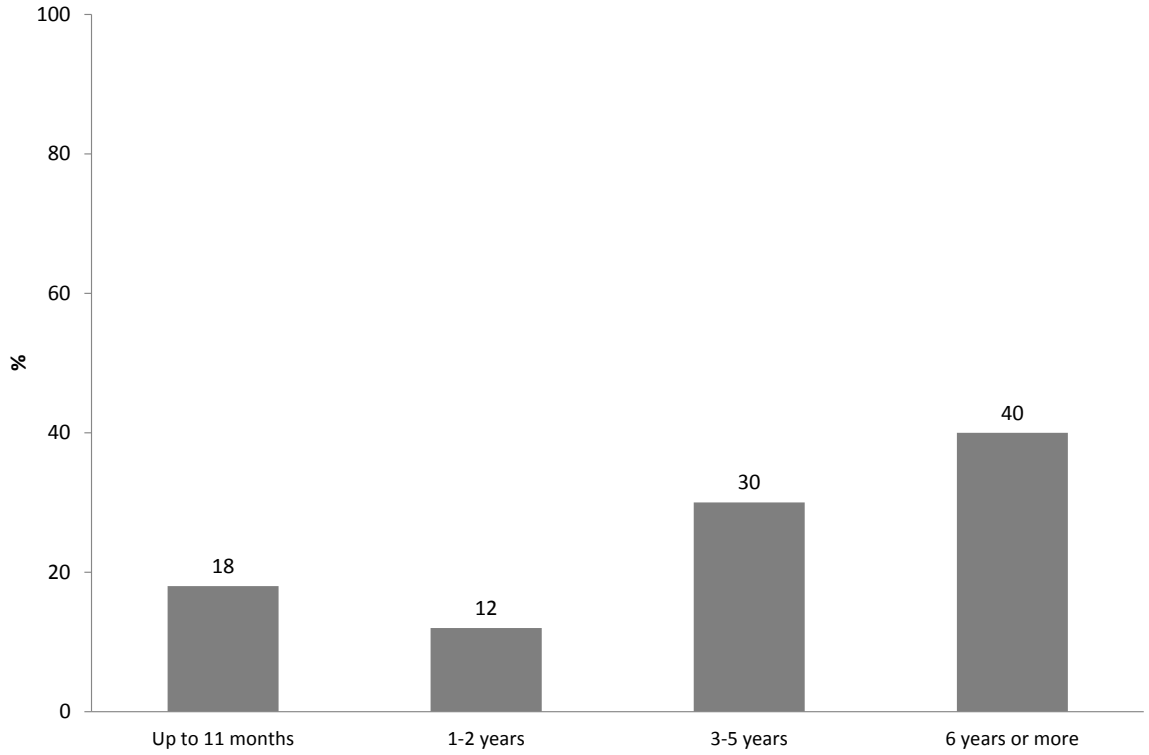
Q10. Which of the following best describes your motorbike riding history?
Total sample; Weighted; Base 2012 n = 545; 2013 n=692; 2014 base n = 776

Length of break from riding

Among those who had stopped riding, the average age respondents stopped riding at was 36.1 years old.

Those who had taken a break from riding and had started riding again were asked how long their most recent break had been. In 2014, just under one in five (18%) said their break was under a year in duration. Just over one in ten (12%) reported that the duration of their most recent break was between one and two years, followed by 30% who had had a longer break of between three and five years. Two-fifths (40%) reported a break of six years or longer.

Figure 18: Duration of most recent break from riding - 2014 only



Q7B. You have said you had a break from riding and had started riding again. Approximately, how long was your most recent break?
Total sample; Weighted sample; Base n = 114;

While samples sizes for some of the sub-groups were small, females, those aged 18-25 and those aged 26-39 who were on a break were most likely to have had a break of less than an year (46% and 54% and 36% respectively). Males (43%) and those who were aged 40 or older (52%) were more likely to report that their most recent break was 6 years or longer (See Table 16.

Table 16: Most recent break from riding – by demographic groups

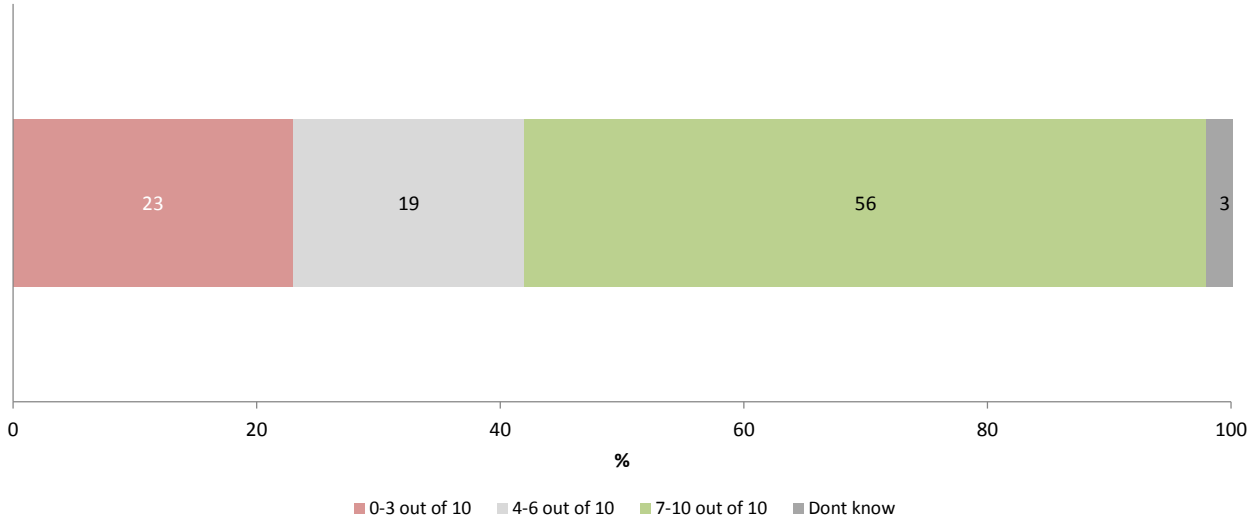
Column %	Gender		Age			Location	
	Male (n=91)	Female (n=23)*	18-25 (n=22)*	26-39 (n=30)*	40+ (n=62)	Balance of Victoria (n=49)	Melbourne (n=65)
Up to 11 months	15↓	46↑	54↑	36↑	11↓	23	16
1-2 years	12	8	18	14	11	17	9
3-5 years	30	33	28	48	26	16↓	37↑
6 years or more	43↑	13↓	0↓	2↓	52↑	43	38

Q7B. You have said you had a break from riding and had started riding again. Approximately, how long was your most recent break?
Total sample; Weighted sample; Base n = 114;
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
** Note: Small sample sizes*

Respondents who had not ridden in the last twelve months or had stopped riding but reported they may resume in the future were asked how likely it was that they would ride again. The overall sentiment was that respondents who had quit riding thought there was a good chance they would ride again in the future. More than half (56%) reported a high likelihood of between seven and ten (on a 0-10 scale). Just over one in five (23%) reported extremely low likelihoods (0-3

out of 10) of getting on a motorcycle again. An almost equal proportion (19%) of respondents elected a moderate likelihood (4-6 out of 10). This distribution is unchanged from results from 2013.

Figure 19: Likelihood of lapsed riders to ride again in the future - 2014



Q7A. What is the likelihood that you will ride again in the future?
Base: Stopped riding but may ride again in the future or not ridden in the last 12 months
Weighted sample; Base n = 187

A lower proportion of those aged 40 or over indicated a high likelihood of returning to their bike (50% reported a likelihood of 7-10 out of 10 compared to 68% of 18-25 year olds and 67% of 26-39 year olds). Notably, although the sample size was small, the average likelihood 'score' for those aged 18-25 was 8.5 out of 10.

Table 17: Likelihood of lapsed riders to ride again in the future by demographic groups

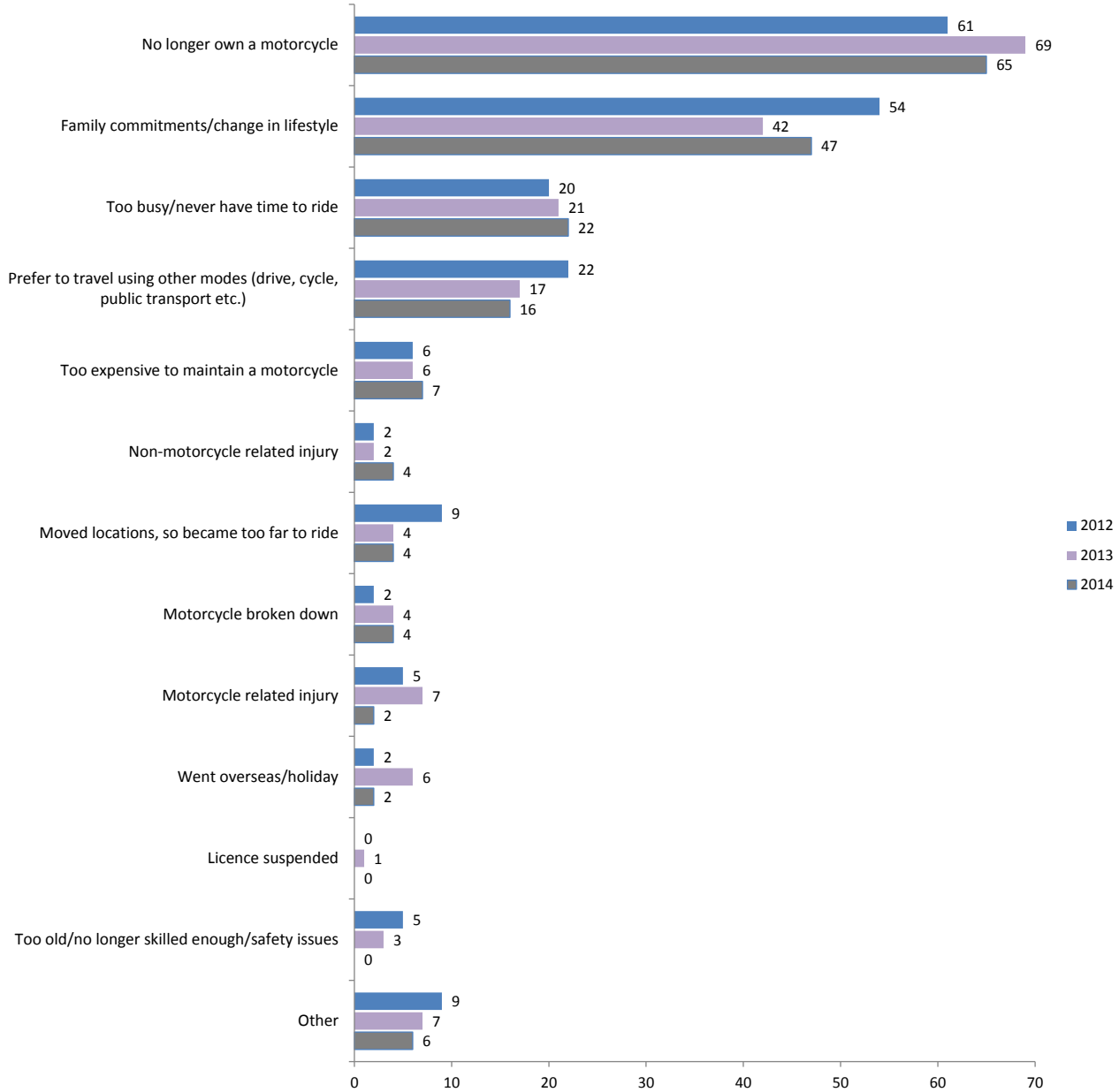
Column %	Gender		Age			Location		
	Male (n=151)	Female (n=40)	18-25 (n=19)	26-39 (n=74)	40+ (n=98)	Melbourne (n=105)	Balance of Victoria (n=86)	Total (n=191)
0-3 out of 10	22	29	0	17	26	22	24	23
4-6 out of 10	20	11	26	13	21	18	23	19
7-10 out of 10	55	59	68	67	50↓	57	52	56
Don't know	3	1	6	2	3	3	1	3
Average out of 10	*6.5*	*6.0*	*8.5↑*	*7.2↑*	*6.0↓*	*6.5*	*6.1*	*6.4*

Q7A. What is the likelihood that you will ride again in the future?
Base: Stopped riding but may ride again in the future or not ridden in the last 12 months
Weighted sample; Base n = 191
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Reasons for no longer riding a motorcycle

Among those who had not ridden in the last 12 months but had not ruled out riding again, the most common reasons in both 2013 and 2014 were *no longer owning a motorcycle* (65% vs. 69% in 2013); and *family commitments or a change in lifestyle* (47% vs. 42% in 2013) (See Figure 20).

Figure 20: Main reasons why lapsed riders have not ridden a motorcycle in the last 12 months



Q9. 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 but may ride again; Weighted; 2012 base n = 89; 2013 base n=164; 2014 base n = 163

Females were more likely than males to nominate family commitments/change in lifestyle as a reason for not riding in the last 12 months (66% compared to 43% of males).

While sample sizes were small, a motorcycle related injury was more likely to be a reason amongst younger riders (15% for those aged 18-25 compared to 3% for those aged 26-39 and 2% for those aged 40+.

Table 18: Main reasons why lapsed riders have not ridden a motorcycle in the last 12 months

Column %	Gender		Age			Location	
	Male (n=126)	Female (n=37)	18-25 (n=8)*	26-39 (n=55)	40+ (n=98)	Melbourne (n=76)	Balance of Victoria (n=87)
No longer own a motorcycle	64	69	36	62	68	62	74
Family commitments/change in lifestyle	43↓	66↑	0↓	46	49	50	39
Too busy/never have time to ride	24	14	0	19	22	23	21
Prefer to travel using other modes (drive, cycle, public transport etc.)	14	25	0	12	18	16	15
Too expensive to maintain a motorcycle	6	11	12	7	7	6	9
Went overseas/holiday	2	0	9	5↑	1↓	2	1
Motorcycle related injury	3	1	15↑	3	2	2	3
Motorcycle broken down	4	2	20↑	2	5	4	3
Too old/no longer skilled enough/safety issues	0	0	0	0	0	0	0
Moved locations, so became too far to ride	3	5	0	9↑	2↓	4	2
Non-motorcycle related injury	4	0	0	3	4	5	0
Licence suspended	0	0	0	0	0	0	0
Other	5	8	25↑	10	4	7	3

Q9. 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 but may ride again; 2014 base n=161 to 163
**Note: Small sample size*

Among the small number of those who had stopped riding but were *not* planning to take it up again in the future (n=31) the most common reasons were similar. More than one third in three mentioned *safety concerns* (34%) *family commitments/change in lifestyle* (26%), and a *preference for different modes of transport* (26%). Twenty two percent (22%) mentioned *no longer interested in riding/motorcycles*.

5.2 Riding activity segments

Using the data on recent riding behaviour and riding history, respondents can be classified into three riding activity groups:

- "active riders"
- "lapsed riders" or
- "former riders".

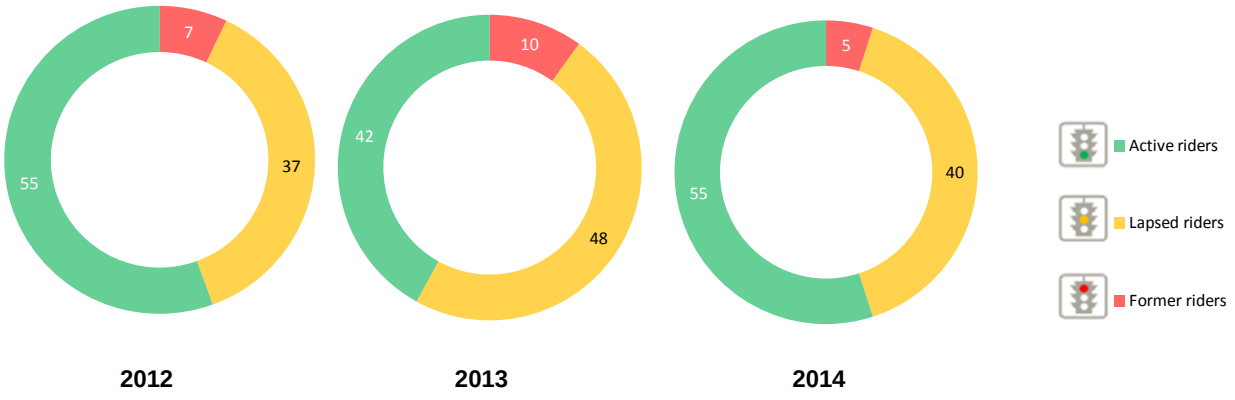
Compared to 2013, there seems to have been a shift from respondents being classified as lapsed riders and an increase in active riders in the mix. Overall, the riding population in 2014 has a similar make-up to that in 2012.

In 2014, more than half of respondents would be classified as **"active riders"** - that is they had ridden in the last 12 months either regularly or occasionally or had started riding again after a break (55% - significantly higher than the 42% in 2013).

"Lapsed riders" made up 40% of all respondents in 2014 (significantly lower than the 48% in 2013 but similar to the 37% reported in 2012). Lapsed riders were respondents who said they had stopped riding but may decide to ride again in the future or had not ridden in the last 12 months but still considered themselves 'regular' riders. This finding suggests that although someone with a motorcycle licence may not ride regularly; there is a substantial proportion who has not ruled out riding again in the future.

Only 5% of respondents could be considered as **"former riders"** - those who had stopped riding and did not intend to ride again in the future (10% in 2013 and 7% in 2012).

Figure 21: Riding activity segments - 2012-2014



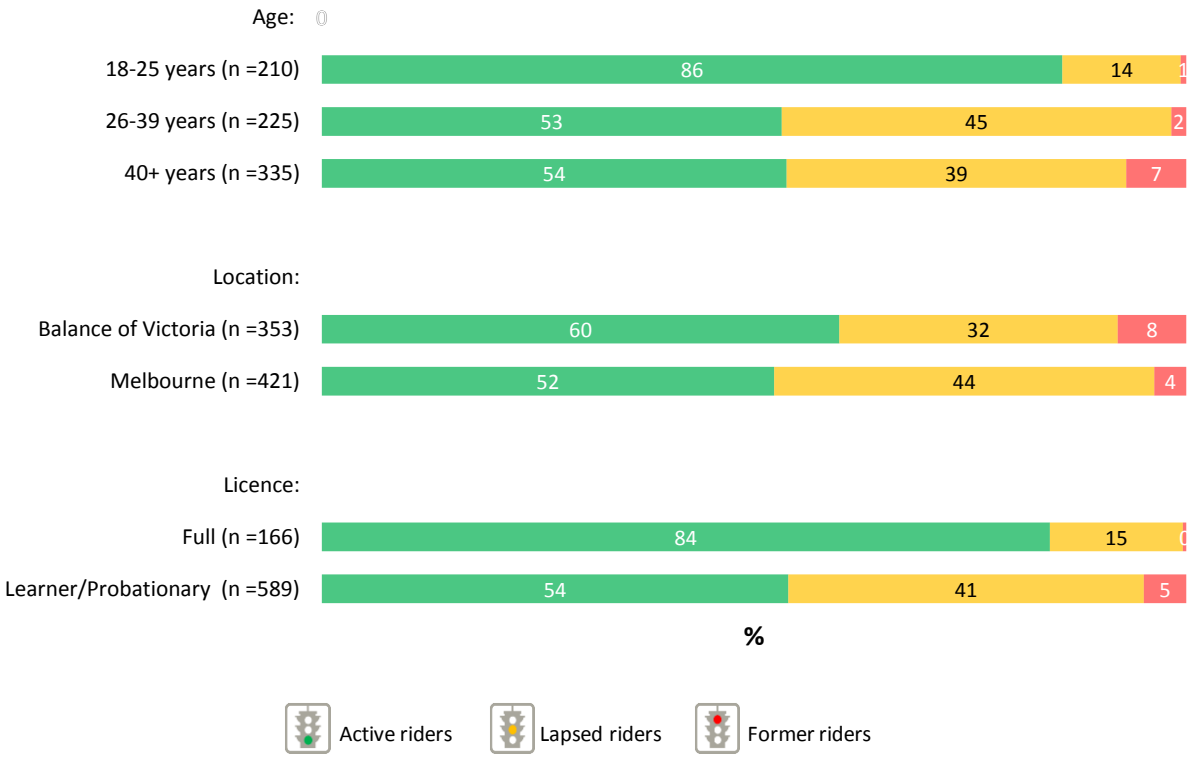
Q10 Which of the following best describes your motorbike riding history?
Q7 Have you ridden a motorcycle in the last 12 months (either on or off-road)?
All respondents; Weighted; 2012 base n = 545; 2013 base n=690; 2014 base n = 774

Figure 22 below, highlights some of the differences observed between the riding activity segments in 2014. This includes higher proportions of *active riders* among:

- those aged 18-25 (86% vs. 53% of those aged 26-39 and 54% of those aged 40 or older);
- learner/probationary licence holders (84% compared to 54% of full licence holders); and

Lapsed riders were more prevalent among full licence holders (41%) and those who lived in Melbourne (44%).

Figure 22: Riding activity segments by selected rider characteristics - 2014



Q10 Which of the following best describes your motorbike riding history?
Q7 Have you ridden a motorcycle in the last 12 months (either on or off-road)?
Filter: Excluding never ridden a motorcycle; Weighted; Base n = 545

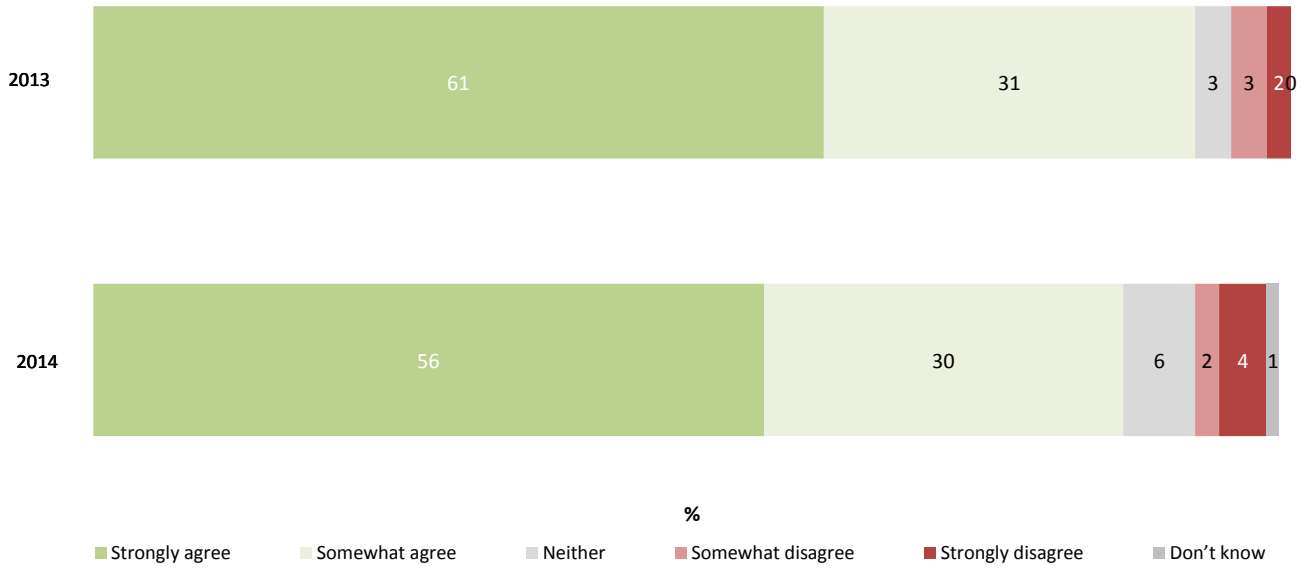
Many of the questions in the survey were directed to active riders, However, where relevant, results from the survey have also been analysed according to these riding activity segments.

5.3 Riding vs. driving

In 2014, respondents were asked the extent to which they agreed/disagreed with the statement: 'Drivers don't understand what it is like to be a motorcyclist'. The vast majority (86%) of respondents who had ridden in the last 12 months agreed (56% strongly agreed and 30% somewhat agreed). However, there has been a decrease in those who feel this way compared to 2013 where 92% agreed with this statement.

Those who lived in Melbourne were more likely to strongly agree than those living in regional areas (62% vs. 47%).

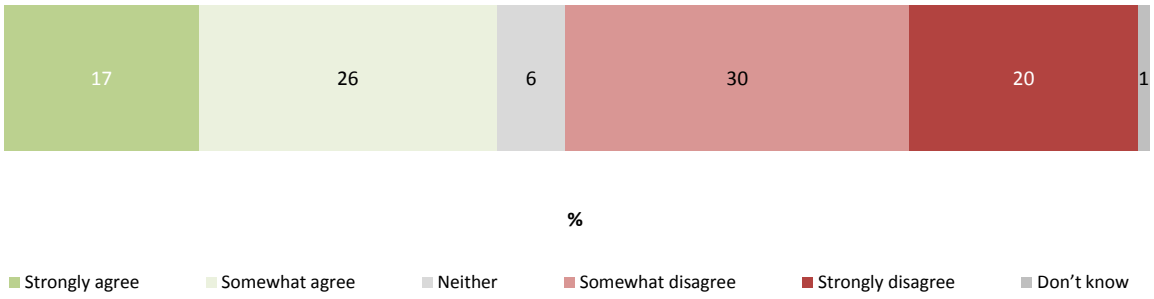
Figure 23: Agree/disagree: Drivers don't understand what it's like to be a motorcyclist – 2013 vs. 2014



Q55i. To what extent do you agree or disagree with the following statements – Drivers don't understand what it is like to be a motorcyclist?
Weighted; 2013 base n = 491, 2014 base n = 574

When asked whether they drivers were aware of motorcyclists when they were driving, views were mixed with half (50%) of respondents disagreeing with the statement and 43% of respondents agreeing with the statement.

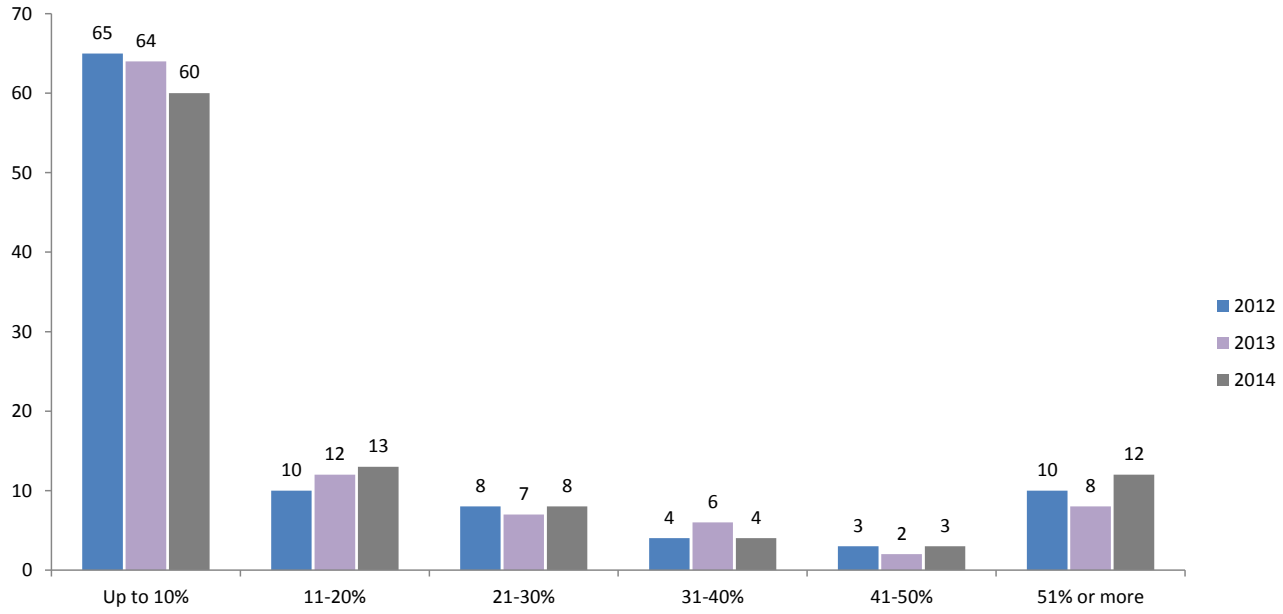
Figure 24: Agree/disagree: Most drivers are aware of motorcyclists when they are driving – 2014



Q55k. To what extent do you agree or disagree with the following statements – Most drivers are aware of motorcyclists when they are driving
Weighted; base n = 574

Data was also collected on the proportion of time respondents rode their motorcycle compared to driving a car (See Figure 25). Only a small proportion of respondents relied solely on their motorcycles for transport – only 5% in 2014 said they rode their motorcycle more than 90% of the time. In fact, only one in four respondents in 2014 (27%) rode their motorcycle more than 20% of the time.

Figure 25: Proportion of time spent riding a motorcycle vs. driving a car - 2012-2014

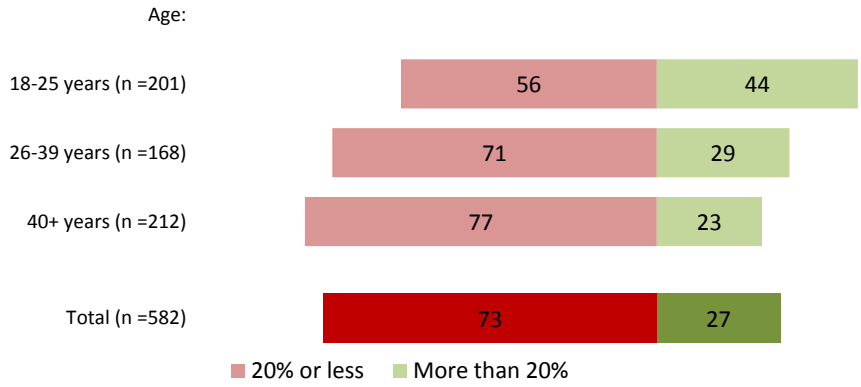


Q8. Thinking about your time spent riding and driving over the last 12 months, approximately what percentage of the time would you say you rode a motorcycle (on or off-road) compared to driving a car?

Filter: Ridden in the last 12 months; Weighted; 2012 base n = 440, 2013 base n=493, 2014 base n = 582

Figure 26 shows that the respondents who were significantly more likely to report they rode more than a fifth of the time in 2014 were aged between 18 and 25 (44%). Similarly, L/P licence holders were also more likely to say they rode more than 20% of the time compared to driving (38% vs. 26% of full licence holders).

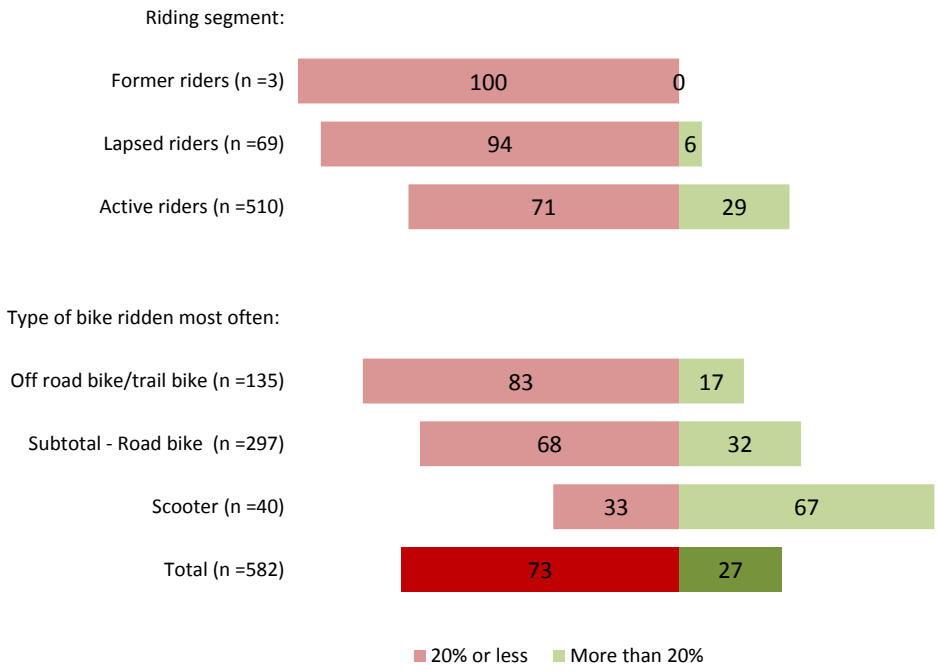
Figure 26: Proportion of time spent riding a motorcycle vs. driving a car – differences between demographic groups – 2014



Q8. 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) compared to driving a car?
Filter: Ridden in the last 12 months; Weighted; 2014 Base n =582
**Note: Small sample size*

Those who rode more than 20% of the time also included those who commuted (46%) or rode recreationally on-road (33%) or owned a scooter (67%) (See Figure 27). Those who owned a newer bike were also more likely to ride more often (43% of those who owned a bike made in 2010 or later).

Figure 27: Proportion of time spent riding a motorcycle vs. driving a car – differences between rider groups - 2014



Q8. 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) compared to driving a car?
Filter: Ridden in the last 12 months; Weighted; 2013 Base n =440
**Note: Small sample size*

As would be expected, those who commuted on their motorcycle were most likely to say they rode more than 20% of the time compared to the time they spent driving. Recreational off-road riders were most likely to say rode 20% or less compared to the time they spent driving a car.

Table 19: Proportion of time spent riding a motorcycle vs. driving a car – differences between riding purpose

	Commuter	Recreational on-road rider	Recreational off-road rider
20% or less	54↓	67↓	81↑
More than 20%	46↑	33↑	19↓

Q8. 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) compared to driving a car?
Filter: Ridden in the last 12 months; Weighted; 2013 Base n =440
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

5.4 Riding for commuting and recreational purposes

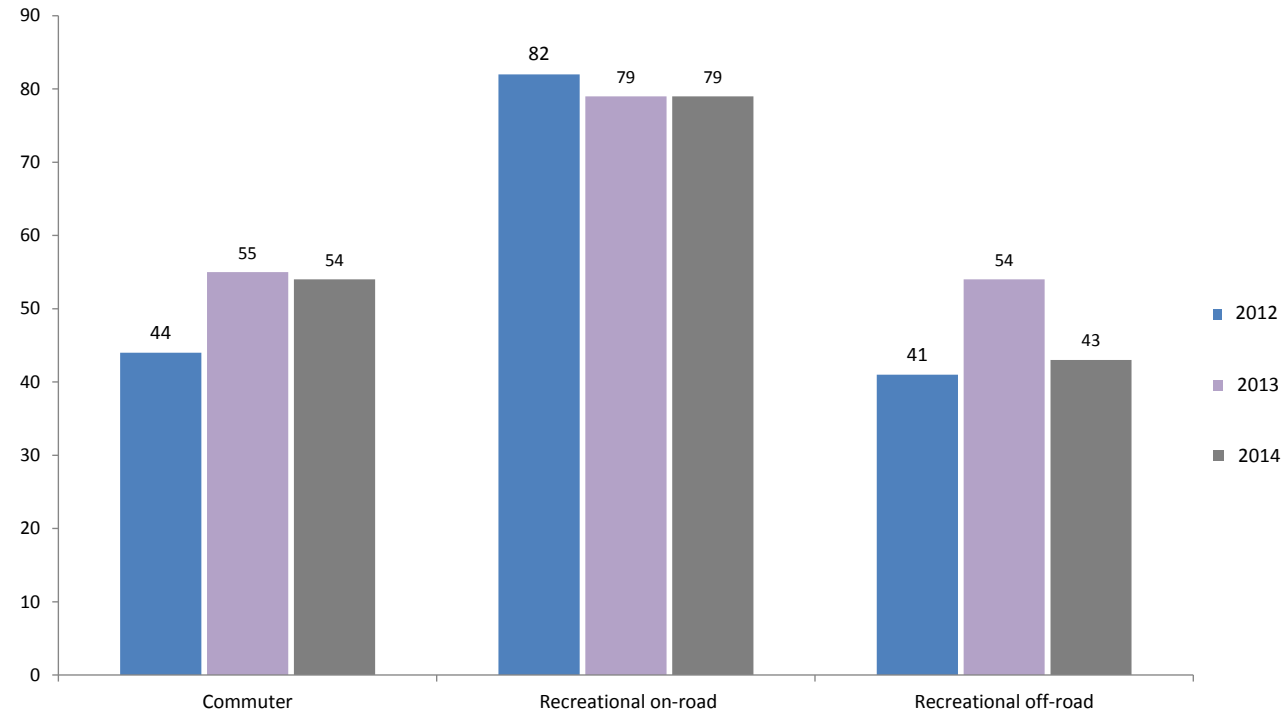
Active riders were asked what *type* of riding they did in the last 12 months as a proportion of *all* the time they spent riding a motorcycle. Specifically, respondents were asked to provide the approximate proportions they spent riding for:

- commuting purposes (i.e. going to work, study, shops);
- recreational purposes on-road (i.e. riding for leisure on public roads, highways, freeways); and
- recreational purposes off-road (i.e. riding on tracks in national parks or on private property).

Respondents were grouped into three categories based on whether they had undertaken *any* riding for commuting, recreational on-road or recreational off-road riding in the previous year. The following section covers the prevalence of riding for commuting or recreational purposes (either on or off-road).

The majority of active riders in both 2013 and 2014 reported they rode recreationally on-road (79% in both years, a slight decline from 2012 (82%)). Compared to 2013, there has been a decrease in the proportion of respondents who said they rode recreationally off-road (43% vs. 54% in 2013), but the proportion of riders who ride recreationally off road is similar to 2012 (41%).

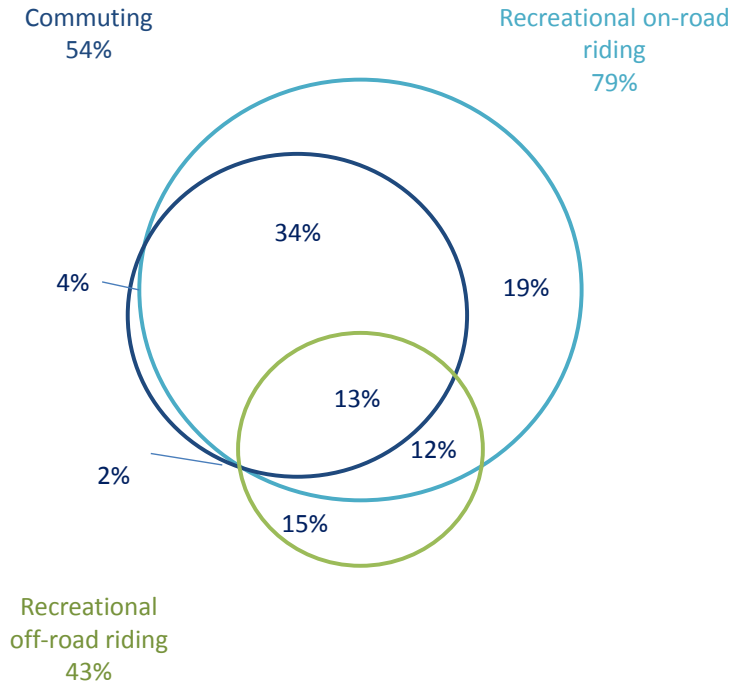
Figure 28: Proportion of respondents who commuted and/or rode recreationally in last 12 months - 2012-2014



Q18 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 excluding commuter/recreational riding response error; Weighted; 2012 base n = 354; 2013 base n=399; 2014 base n = 495
Note: Does not add to 100% as respondents could ride with more than one purpose

Figure 29 shows the prevalence of the different combinations of riding purposes. The most common combination was commuting in conjunction with riding recreationally on-road (34%), followed by recreational off-road riding exclusively (19%).

Figure 29: Proportion of respondents who commuted and/or rode recreationally in last 12 months – riding purpose combinations



Q18 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 excluding commuter/recreational riding response error; Weighted; Base n = 495

In 2014, there were some differences in the type of riding undertaken by different rider groups. These included (See Table 20):

- A higher incidence of *on-road riding for recreational purposes* among those aged over 40 years (56%) and those who rode less than 20% of the time (52%).
- A higher incidence of *commuting* by those:
    - who lived in metropolitan Melbourne compared with those in regional Victoria (60% vs. 44%);
    - who rode more than 20% of the time (51%).
- A higher incidence of *recreational off-road riding* among those who:
    - were aged between 18-39 years (54%); and
    - rode less than 20% of the time (49%).

Table 20: Proportion of respondents who commuted and/or rode recreationally in last 12 months – by selected demographic variables - 2014

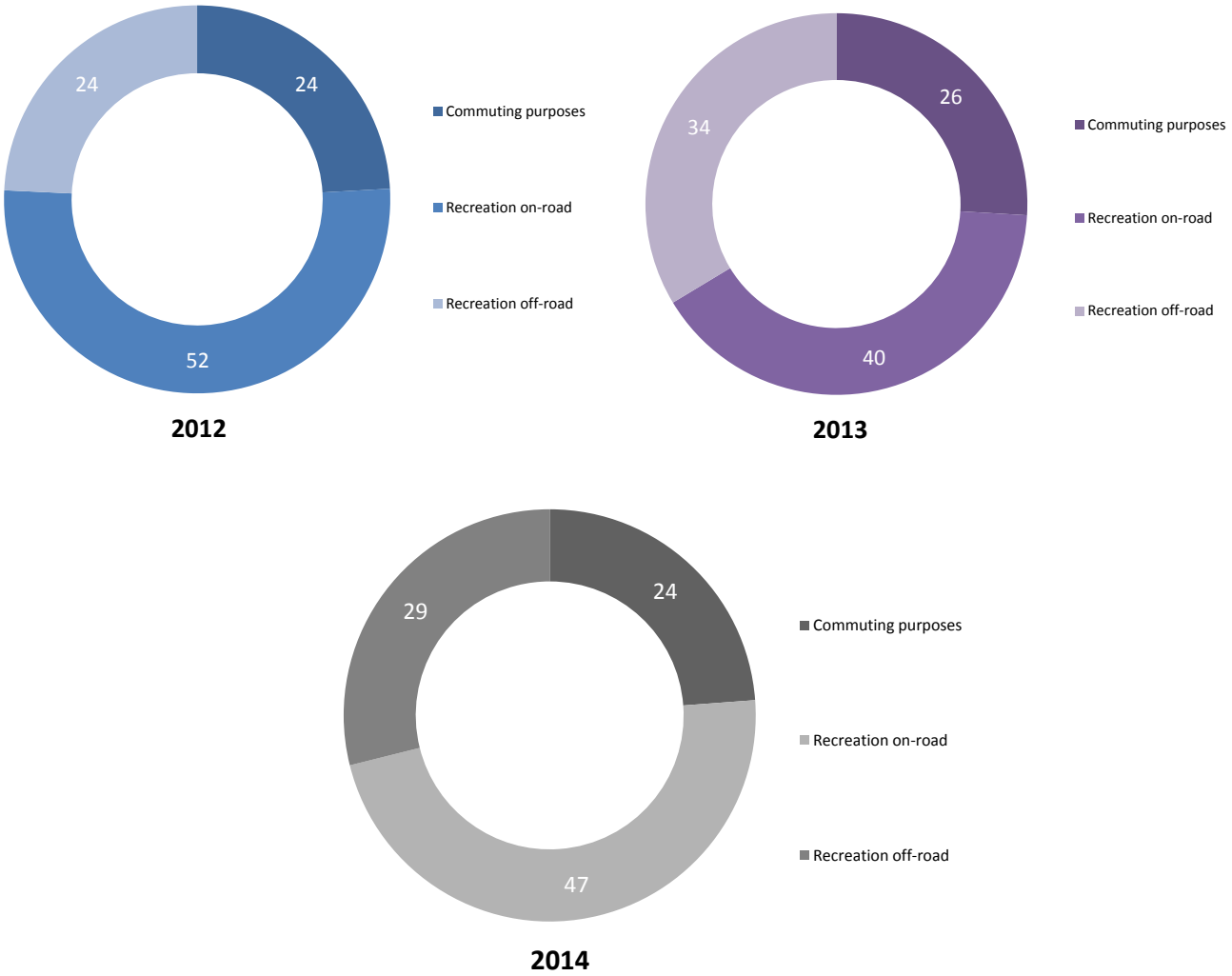
Row %	Commuter	Recreational on-road rider	Recreational off-road rider
Gender			
Male (n=399)	54	80↑	44
Female (n=95)	49	65↓	33
Age			
18-25 (n=184)	67↑	75	56↑
26-39 (n=135)	49	72	53↑
40+ (n=175)	53	82↑	37↓
Location			
Melbourne (n=207)	60↑	81	42
Balance of Victoria (n=288)	44↓	75	44

Q18 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 excluding commuter/recreational riding response error; Weighted; Base n =494 to 495
*↓↑ indicates statistically significant difference compared to respondents **not** in that category i.e. between Melbourne and the balance of Victoria*

Share of time spent riding for commuting or recreational purposes among active riders

Figure 29 showed the proportion of respondents who did each of the three types of riding, Figure 30 below shows the proportion of time spent doing each. On average, 29% of the time riding was spent riding recreationally off-road (vs. 34% in 2013). The average amount of time spent riding for commuting purposes was just under a quarter of the time (24%). There were no significant differences between the time spent riding in 2013 and 2014.

Figure 30: Average proportion of time spent commuting vs. riding recreationally in last 12 months - 2012 vs.2013 vs. 2014



Q18 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 excluding commuter/recreational riding response error; Weighted; 2012 base n = 354; 2013 base n=399; 2014 base n = 495

In 2014, those aged 40 years or older spent a significantly higher proportion of riding time riding on-road for recreation than younger riders (56% vs. 32% of 18-39 year-olds) (See Table 21).

Other differences in the average time spent riding for different purposes included a higher incidence of:

- *commuting* among those who lived in Melbourne compared with those who lived in other areas of Victoria (29% vs. 17%); and
- *off-road recreational riding* among: those aged 26-39 years compared with those aged 40 and over and those aged 18-25 combined (39% vs. 25%).

Table 21: Average proportion of time spent commuting vs. riding recreationally in last 12 months by demographic characteristics - 2014

Average % (row)	Commuter	Recreational on-road rider	Recreational off-road rider
Age			
18-25 (n=184)	34↑	33↓	34
26-39 (n=135)	29	32↓	39↑
40+ (n=175)	20↓	56↑	24↓
Location			
Balance of Victoria (n=207)	17↓	52	31
Melbourne (n=288)	29↑	44	28

Q18 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 excluding commuter/recreational riding response error; Weighted; Base n = 494 to 495
*↓↑ indicates statistically significant difference compared to respondents **not** in that category i.e. between male and female*
Note: Table adds across. Where totals do not add to 100%, this is due to rounding.

In terms of riding experience, full licence holders were more likely to spend more time riding recreationally on-road than learner/probationary licence holders (49% of the time riding vs. 37%). Those who had started riding at a young age were more likely to say they spent more time riding off-road than commuting or riding on road (50% of the time compared to 16% and 34% commuting or riding on road). Those who started riding at 26 or older tended to spend the least amount of time riding off-road (16% of the time).

Table 22: Average proportion of time spent commuting vs. riding recreationally in last 12 months by rider experience characteristics

Average % (row)	Commuter	Recreational on-road rider	Recreational off-road rider
Motorcycle licence			
Learner/Probationary (n=141)	34↑	37↓	29
Full licence (n=347)	23↓	49↑	28
Age when started riding			
up to 10 years	16↓	34↓	50↑
11-17 years	21	53↑	26
18-25 years	29	46	25
26 or older	34	50	16↓

Q18 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 = 493
*↓↑ indicates statistically significant difference compared to respondents **not** in that category i.e. between learner and probationary and full licence holders*

There were also some differences in the amount of time spent riding for recreational or utilitarian purposes by the number of bikes kept at home, main type of bike ridden, engine capacity of the bike and registration type. Those who were more likely to spend their time *commuting* included those who own a scooter (60% of the time).

Those who were more likely to spend their time riding recreationally on-road included:

- those who own a road bike (63% of the time);
- those who have a bike with an engine capacity of 701+ cc (73%); and
- those whose main bike was road registered (58%).

Those who spent more of their time riding recreationally off-road included those who:

- own an off-road/trail bike (88%); and
- have a recreational/farm bike registration (83%); or
- have not registered their bike (77% although the sample size was small (n=19)).

Table 23: Average proportion of time spent commuting vs. riding recreationally in last 12 months by motorcycle ownership characteristics

Average % (row)	Commuting	Recreational on-road riding	Recreational off-road riding
Number of bikes kept at home			
None (n=43)	11↓	39	51↑
One only (n=229)	32↑	49	19↓
2 or more (n=223)	18↑	47	35↑
Type of bike (main bike ridden)			
Off road/ trail bike (n=125)	8↓	10↓	82↑
Road bike (n=227)	28↑	63↑	8↓
Scooter (n=37)	54↑	45	0↓
Engine capacity (main bike ridden)			
Up to 250cc (n=171)	32↑	27↓	41↑
251-700cc (n=150)	26	31↓	43↑
701+ (n=123)	20↓	73↑	7↓
Registration			
Road (n=334)	29↑	58↑	12↓
Recreational/farm bike (n=67)	10↓	7↓	83↑
None (n=19)*	10	13↓	77↑

Q18 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 = 398 to 495
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
**Note: Small sample size*

Recreational riding locations

The most common areas to ride recreationally were on public roads in rural/non-built up areas (56%). Public roads in metropolitan areas were also popular (30%). Riding on private land was less common in 2014 compared to 2013 (22% vs. 32%).

Those in metropolitan Melbourne were more likely to say they rode in state/national parks (36% vs. 22% in regional Victoria). As expected, respondents in regional Victorian locations were less likely to report doing most of their recreational riding on public roads in metropolitan areas (24% and 40% respectively).

Table 24: Recreational riding locations - 2013 vs. 2014

	% 2013	% 2014
Public roads in rural/non-built up areas	52	56
Public roads in metro areas	29	34
State/national parks	29	30
Private land	32↑	22↓
Other	-	5

Q25. Where do you do most of your recreational riding (on-road or off-road)?
Filter: Recreational riding on or off-road; Weighted; 2013 base n = 369, 2014 base n=480.
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*

Preferences of off-road riding locations differed depending on the type of riding respondents had undertaken in the last year with private land and state/national parks more often frequented by those who had ridden off-road for recreational purposes (See Table 25).

Table 25: Recreational riding locations by riding purpose

Column %	Commuter (n=270)	Recreational on-road rider (n=376)	Recreational off-road rider (n=233)
State/national parks	21↓	22↓	66↑
Private land	13↓	14↓	49↑
Public roads in metro areas	43↑	41↑	11↓
Public roads in rural/non-built up areas	61	67↑	33↓
Other	5	3	7

Q25. Where do you do most of your recreational riding (on-road or off-road)?
Filter: Active riders; Recreational riding on or off-road; Weighted; Base n = 472 to 480
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Note: Commuters, on-road recreational and off-road recreational riders defined as riding for this purpose at least 1% of the time in the last 12 months

Riding with others

In addition to exploring where riders did most of their recreational riding (on or off-road); respondents were asked about whether they mainly rode on their own or with other people. Over a third (38%) mainly rode on their own, followed by three in ten (29%) who rode with two to three other people and just over one in five who rode with one other person (23%). These were similar to proportions in 2013.

Those who mainly rode an off-road bike were more likely to say they rode in a group compared to scooter or road bike riders (See Table 26).

Table 26: Whether ride with others when riding recreationally (on or off-road) with others - 2014

	Type of bike		
Column %	**Off road bike/trail bike (n=123)**	**Road bike (n=264)**	**Scooter (n=29)**
On your own	14↓	41	79↑
With 1 other person	22	23	17
With 2-3 other people	44↑	26	2↓
4 -6 other people	15↑	6	2
7 or more other people	4	2	0

Q25a. When riding recreationally (on-road or off-road), do you mainly ride?
Filter: Recreational riding on or off-road; Weighted; Base n = 470
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*
Note: Commuters, on-road recreational and off-road recreational riders defined as riding for this purpose at least 1% of the time in the last 12 months

5.5 Distances ridden in last 12 months

Respondents were asked to estimate the distances they had ridden on any motorcycle *for any reason* in the last 12 months. The distribution of approximate kilometres per month is shown in Figure 31. In 2014, most respondents rode up to 100km per month (28%) or 101-500km per month (28%). In 2013, 45% rode up to 100km per month in 2013.

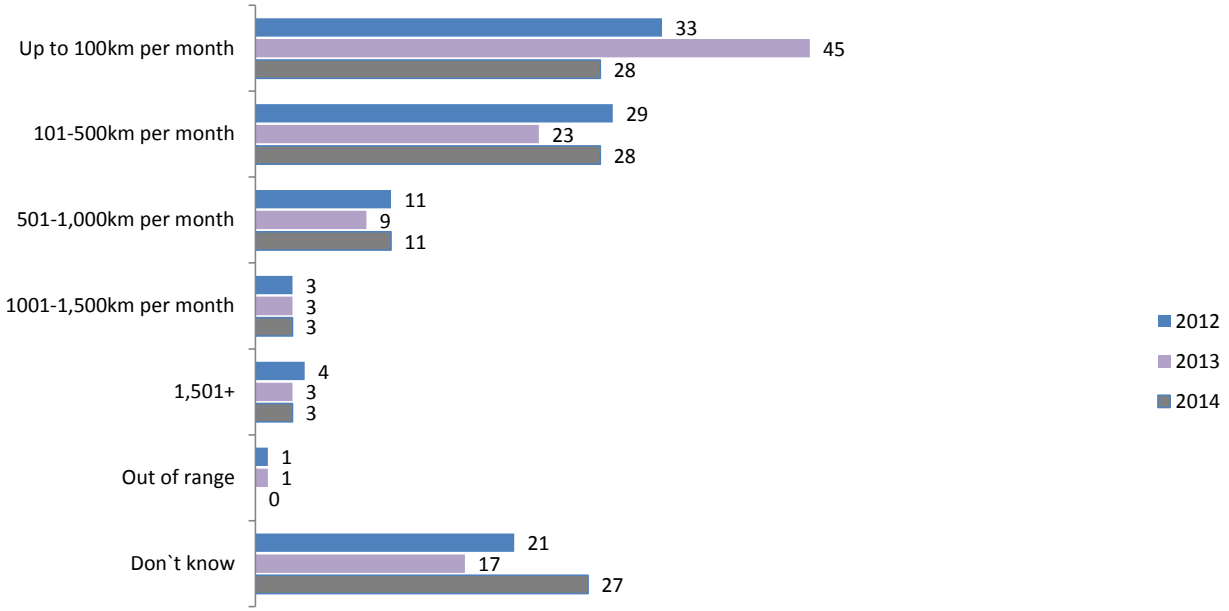
Commuters and recreational on-road riders (38% and 37% respectively compared to 23% of recreational off-road riders) were more likely to travel distances between 101-500km per month. Close to one in five (18%) of those who commuted reported riding between 500-1000km per month.

Active riders were more likely to travel between 101 and 500km per month (30% vs. 12% of lapsed riders).

The average distance per year ridden by respondents was calculated to be an equivalent of 4996.4 km in a year or 416.4km per month. This was similar to that reported in 2013 (average of 4010.5 per year or 334.2 per month).

The median distance per month was calculated to be approximately 183km per month (meaning that half of respondents rode more than 183km per month and half of respondents rode less than this amount).

Figure 31: Distance ridden in last 12 months for any purpose – approximate km per month - 2012-2014



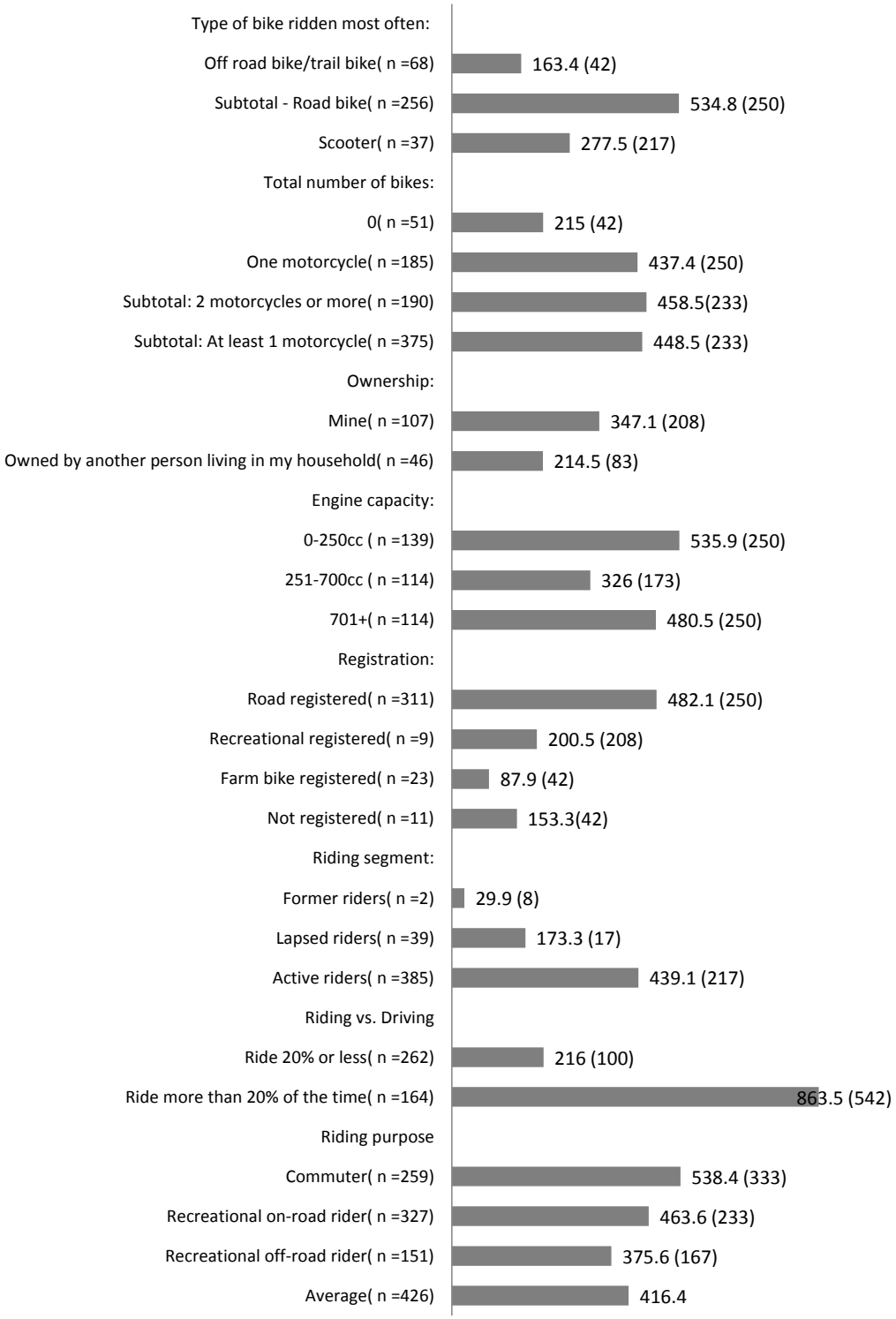
Q29. In the last 12 months, how many kilometres did you ride ON ANY motorcycle on the road for any reason? (Per week; per month or per year).
Filter: Ridden in the last 12 months; Weighted; 2012 base n = 440, 2013 base n=496; 2014 base n = 583

On average, males tended to ride more kilometres than females (417.9 vs. 401km per month).

There was some correlation between types of riders and the approximate kilometres ridden per month which was reflected in the approximate distances travelled by riders of different types of bikes. For example, road bikes (approximately 534.8km per month) travelled significantly greater distances than off-road/trail bike riders (163.4km per month) and scooter riders (approximately 277.5km per month)

Commuters rode greater distances on average than recreational riders (538.4 km per month compared to 463.6km and 375.6km for recreational on-road and off road riders respectively) (See Figure 32).

Figure 32: Distance ridden in last 12 months – approximate km per month - 2014



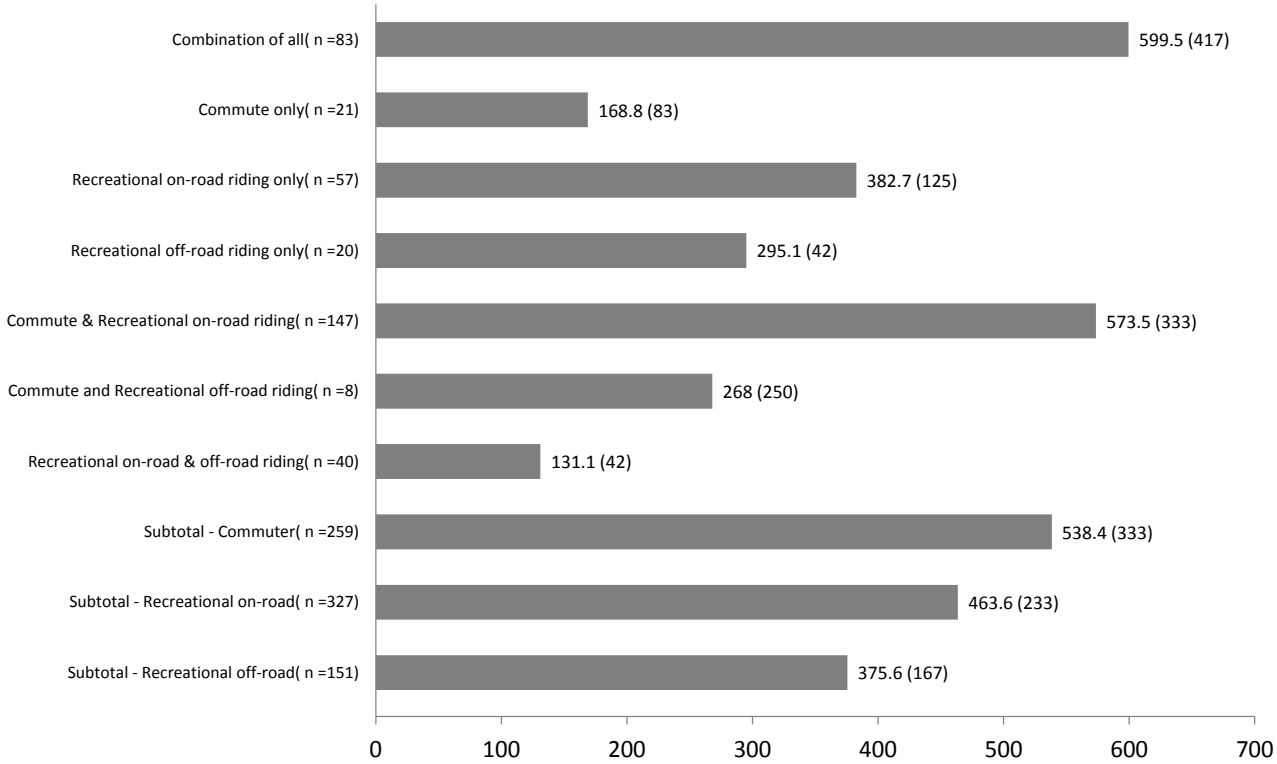
(Median km per month in brackets)

Q29. 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=426

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

Respondents were asked the distances travelled in the last 12 months for any purpose. Comparisons of total distance travelled among those who had done some commuting, or recreational riding in the last year is shown in Figure 33. Distance travelled per month tended to be higher where respondents reported they commuted at least some of the time.

Figure 33: Distance ridden in last 12 months – approximate km per month (mean and median)

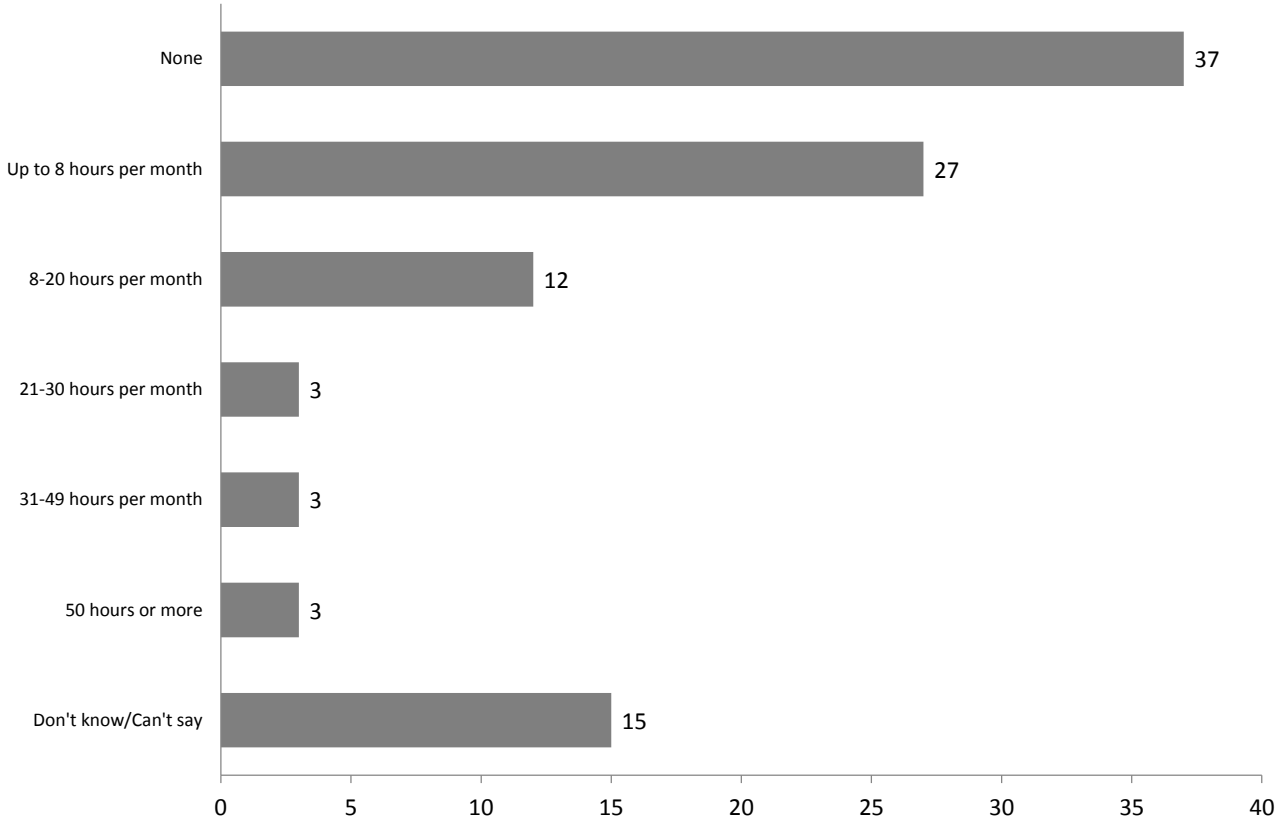


Q29. In the last 12 months, how many kilometres did you ride ON ANY motorcycle on the road for any reason? (Per week; per month or per year).
Filter: Active riders AND excluding commuter/recreational riding response error; Weighted; Total n = 376

Hours spent riding off-road

In 2014, respondents who had ridden in the last year were asked how many hours they rode off-road for any reason. Over a third of these respondents (37%) said they had not ridden off road at all in the previous 12 months. More than one in four respondents (27%) stated they rode up to 8 hours off-road in a month. Another 12% reported riding 8-20 hours per month.

Figure 34: Hours spent riding off road – approximate hours per month (mean)



Q29B. In the last 12 months, how many hours did you ride on any motorcycle off-road for any reason? An approximate number is OK.
Filter: If ridden in the last 12 months AND excluding commuter/recreational riding response error; Weighted; Total n = 577

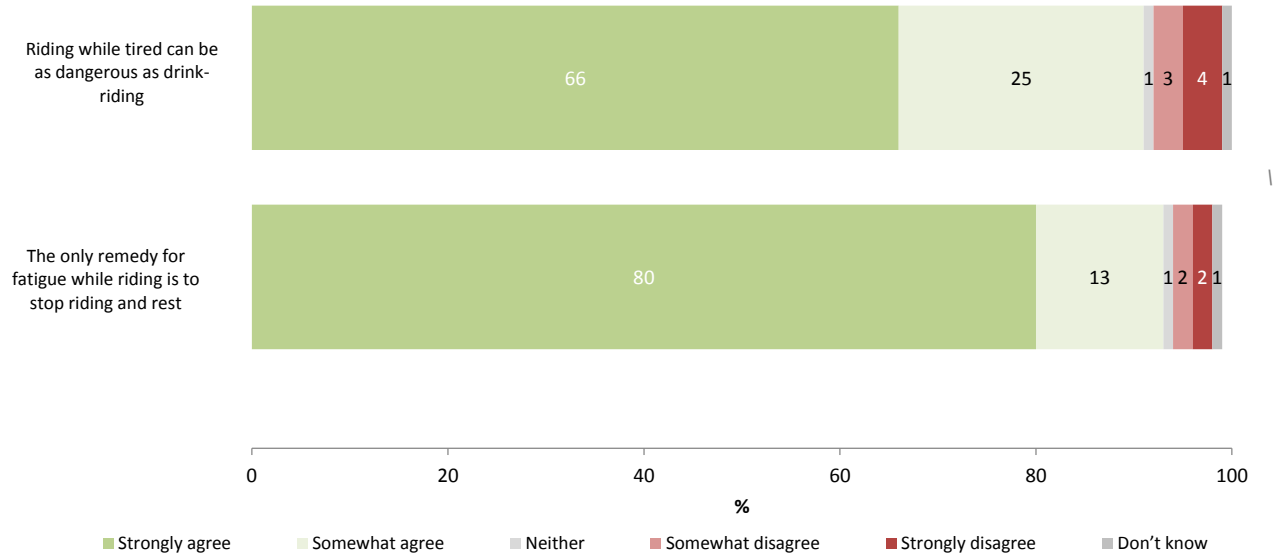
Those who started riding at age 26 or older were more likely to say they had not ridden off road at all in the last 12 months (53%). Among off road riders specifically, close to half (45%) reported they had ridden between 8-20 hours per month off-road. One in five (20%) of those who mainly rode an on-road bike also said they rode off-road around 8-20 hours per month.

5.6 Rider fatigue

When asked about the extent that they agreed or disagreed that 'the only remedy for fatigue while riding is to stop riding and rest', a significant majority of respondents (80%) *strongly* agreed with this statement. Those aged 18-25 were less likely to 'strongly agree' (65% vs. 80% of those aged 26-39 and 83% of those aged 40+).

The majority also strongly agreed that riding while tired can be as dangerous as drink driving (66%).

Figure 35: Agree/disagree statements about fatigue - 2014



Q55f-g. Agreement/disagreement with statements about fatigue
Weighted; Base n = 569 to 574

Respondents were asked what they would normally do if they were feeling drowsy when they were riding. The most common answer was to have a break or have a rest (66%) followed by pull over somewhere (51%). The vast majority (94%) of those who had ridden in the last 12 months mentioned stopping (including having something to eat or doing some exercise).

Table 27: Actions taken when feeling drowsy when riding a motorcycle - 2014

Column %	%
Have a break/have a rest	66
Pull over somewhere	51
Take regular stops	42
Have something to eat or drink	41
Do some exercise	34
Stop riding	33
Subtotal: Mentions of stopping	*94*
Keep riding but more slowly	3
Keep riding to get to destination quicker then rest	2
Other	1

Q55ii. If you are feeling drowsy when riding a motorcycle, which of the following would you normally do?
Base: Ridden in last 12 months - Weighted; Base n = 583

Females were more likely than males to say they would stop riding (50% compared to 31% of males).

Of note, those aged 18-25 were the least likely to say they would have a break or a rest (56% compared to 67% of those aged 26+) or say they take regular stops (27% compared to 44% of those aged 26+). This group was also more likely to say they would keep riding but more slowly (8%) or keep riding to get to destination quicker then rest (4%).

Respondents who had learnt to ride at an early age were also less likely to say they would stop riding (27% vs. 42% of those who had learnt to ride when they were 18 or older).

Table 28: Actions taken when feeling drowsy when riding a motorcycle by demographics

Column %	Gender		Age			Location	
	Male (n=472)	Female (n=110)	18-25 (n=201)	26-39 (n=168)	40+ (n=213)	Melbourne (n=328)	Balance of Victoria (n=583)
Have a break / have a rest	65	69	56↓	74↑	63	66	65
Pull over somewhere	51	53	48	53	51	49	53
Take regular stops	42	46	27↓	41	44	39	44
Have something to eat or drink	39	52	45	45	39	35	45
Do some exercise	33	42	26	30	37	35	33
Stop riding	31↓	50↑	30	42↑	29↓	28	36
Subtotal: Mentions of stopping	93	97	92	97	93	93	94
Keep riding but more slowly	3	3	8↑	4	2	1↓	5↑
Keep riding to get to destination quicker then rest	2	1	5↑	2	2	2	2
Other	1	3	4↑	1	1	1	1

Q55ii. If you are feeling drowsy when riding a motorcycle, which of the following would you normally do?
Base: Ridden in last 12 months - Weighted; Base n = 583
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

6. Attitudes towards speeding and speeding behaviour

Respondents were asked a series of questions relating to their attitudes and behaviour in relation to speeding including questions about travel speed and being pulled over by police.

Close to one in five active riders said they had been pulled over by police in the last 12 months (16%).

When asked about their own speeding behaviour, six in ten (62%) reported that they would not 'ride over the speed limit if I'm sure I'll get away with it'. This has remained steady over the last 3 years of the Motorcycle Monitor.

When asked about speeding in a 60km zone, similar proportions of riders reported people should only ride up to 60kph in these areas as in 2013. Six in ten (58%) respondents nominated a speed limit of 60km or lower as the speed that people should be able to travel without being booked. Regardless of the speed they thought you should be able to travel before being booked, more than half (59%) of respondents said they would never ride above that speed in a 60km zone.

However, in 100km zones, fewer active riders nominated a speed of 100km or less in comparison to 2013 (46% vs. 58% in 2013). One in two respondents said they would never ride above their nominated speed.

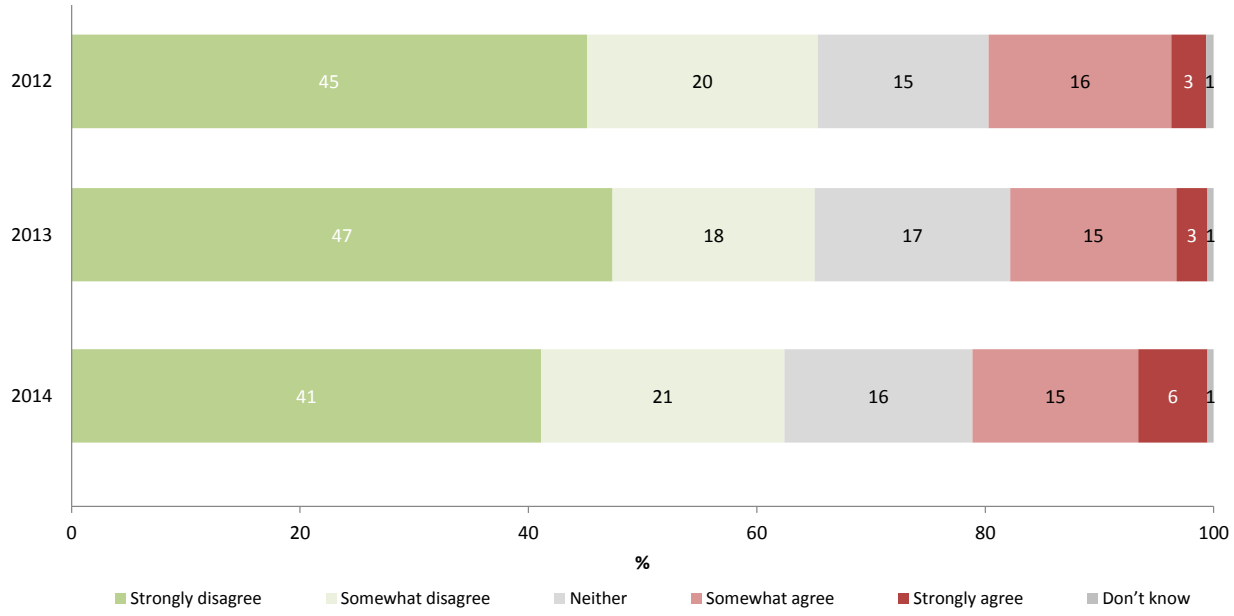
Respondents were also less likely to report that they would never ride at or above their nominated speed in 100km zones compared to 60km zones (50% vs. 59%, although this pattern is consistent with previous years).

Speeding behaviour

Those who had ridden in the last 12 months were asked the extent to which they agreed or disagreed with the statement: '*I ride over the speed limit if I'm sure I'll get away with it'.*

Overall, respondents were most likely to say they disagreed with the statement – in other words they would not ride over the speed limit even if they could get away with it. Two in three (62%) of respondents in 2014 disagreed with the statement (this is on par with the 65% who disagreed in 2013) (See Figure 36).

Figure 36: Agree/disagree: I ride over the speed limit if I'm sure I'll get away with it 2012-2014



Q55 To what extent do you agree or disagree with the following statements? I ride over the speed limit if I'm sure I'll get away with it. Those who have ridden in the last 12 months; Weighted; 2012 Base n = 440; 2013 Base n= 489, 2014 Base n = 569

Female riders were significantly more likely to *disagree* with the statement (i.e. they would not ride over the speed limit even if they were sure they would get away with it) with 85% disagreeing compared to 60% of males. Notably, those aged 18-25 were also less likely to disagree (therefore they were less likely to say they would *not* ride over the speed limit if they were sure they could get away with it) (See Table 29).

Table 29: Agree/disagree: I ride over the speed limit if I'm sure I'll get away with it by key demographic groups

Column %	Gender		Age		
	Male (n=458)	Female (n=110)	18-25 (n=199)	26-39 (n=167)	40+ (n=202)
Strongly/Somewhat disagree	60↓	85↑	51↓	68	62
Neither	18↑	6↓	17	01	19
Somewhat/Strongly agree	22↑	7↓	27	21	19
Don't know	0	1	6↑	0	0↓

Q55 To what extent do you agree or disagree with the following statements? I ride over the speed limit if I'm sure I'll get away with it. Weighted; Base n = 568 to 574

As to the type of bikes owned (Table 30), respondents who tended to say they would ride over the speed limit if they were sure they would get away with it included:

- Those with road bikes compared to scooter and off road bike/trail bike owners (27% agreed vs. 10% and 15% for scooters and off road bikes respectively); and
- Those who owned a motorcycle with an engine capacity of 701+cc (29% vs. 11% of those with 0-250cc bikes agreed and 23% of 251-700cc).

No significant differences were found by crash history at the aggregate level (Table 31); although those who had experienced a crash were *less* likely to strongly disagree with the statement (35% vs. 46%) i.e. they would not go over the limit if they could get away with it.

Table 30: Agree/disagree: I ride over the speed limit if I'm sure I'll get away with it by type of bike

Column %	Type of bike (main bike)			Engine capacity		
	Off road bike/trail bike (n=134)	Road bike (n=292)	Scooter (n=40)	0-250cc (n=194)	251-700cc (n=156)	701+cc (n=123)
Strongly/Somewhat disagree	65	56	79	73	60	51↓
Neither	20	16	11	16	16	20
Somewhat/Strongly agree	15	27↑	10	11↓	23	29↑
Don't know	1	0	0	1	1	0

Q55 To what extent do you agree or disagree with the following statements? I ride over the speed limit if I'm sure I'll get away with it. Those who rode in the last 12 months; Base n = 419 to 574

Table 31: Agree/disagree: I ride over the speed limit if I'm sure I'll get away with it by crash history

Column %	Crash while riding motorcycle	
	Yes (n=228)	No (n=337)
Strongly/Somewhat disagree	58	66
Neither	18	15
Somewhat/Strongly agree	23	18
Don't know	1	0

Q55 To what extent do you agree or disagree with the following statements? I ride over the speed limit if I'm sure I'll get away with it.
Base n = 566 to 572

Whether pulled over by police in last 12 months

Similar proportions of respondents to both the 2013 and 2014 Motorcycle Monitor reported that they had been pulled over by police in the last 12 months. In 2014, 16% of active riders reported they had been pulled over by police in the last 12 months compared to one in five in the previous year (16% vs. 20% in 2013).

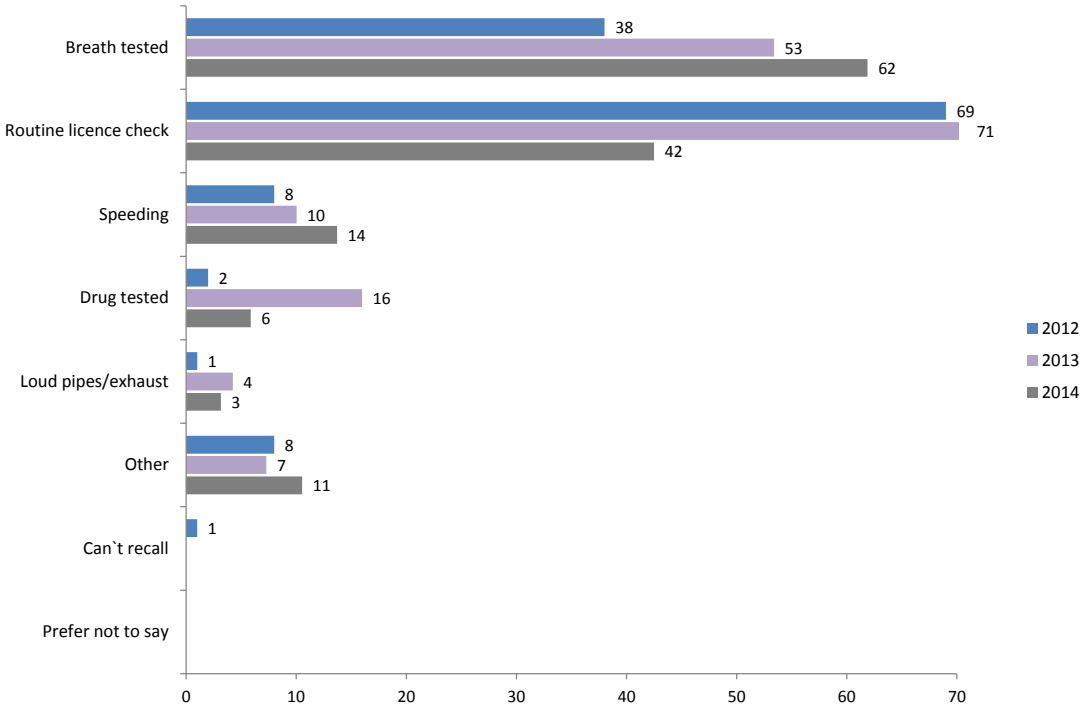
Table 32: Whether pulled over by police in last 12 months - 2013 vs. 2014

Column %	2013	2014
Yes	20	16
No	80	82
Prefer not to say/Can't recall	0	1

Q47 Have you been pulled over by police for any reason while riding your motorcycle in the last 12 months?
Filter: Active riders; Weighted; 2014 base n=506, 2013 base n= 404
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Among those who had been pulled over in the last 12 months, the most common reason in 2014 was breath testing (62%), followed by a routine licence check (41%) and speeding (13%).

Figure 37: Reasons for being pulled over by police in last 12 months



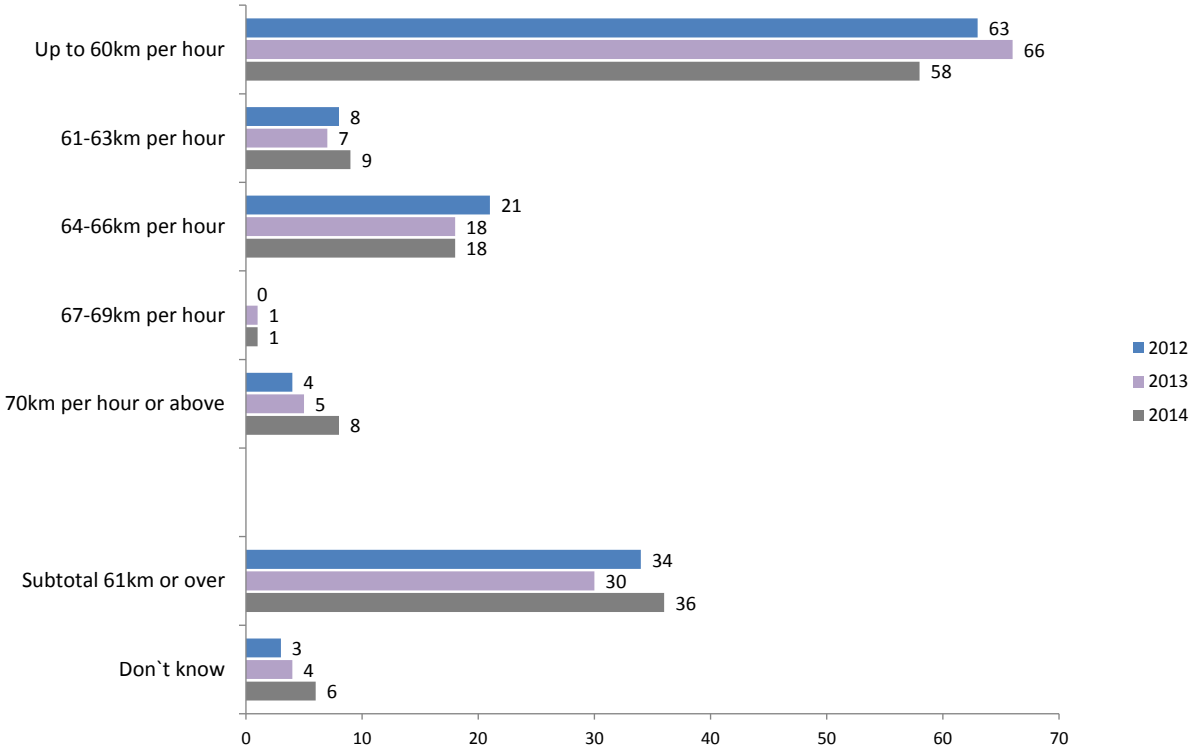
Q48 Why were you pulled over?
Filter: Active riders pulled over by police for any reason in the last 12 months; Weighted; 2012 base n = 88, 2013 base n= 65, 2014 base n = 94
Note: Does not add to 100% due to multiple responses

In addition, those who had ridden in the last 12 months were asked if they had been caught speeding while riding their motorcycle. In 2014, only 4% of respondents indicated that they had. Of the few who had been caught speeding (n=25), a large majority had only been caught once (93%).

Speed limit in a 60km zone

Respondents were asked how fast people should be allowed to ride a motorcycle in a 60km per hour zone without being booked for speeding. Nearly three-fifths (58%) of the respondents nominated exactly 60km per hour or less (see Figure 38). Over a third of respondents in 2014 nominated a speed higher than this (36%).

Figure 38: Speed people should be allowed to ride a motorcycle in a 60kph zone without being booked for speeding

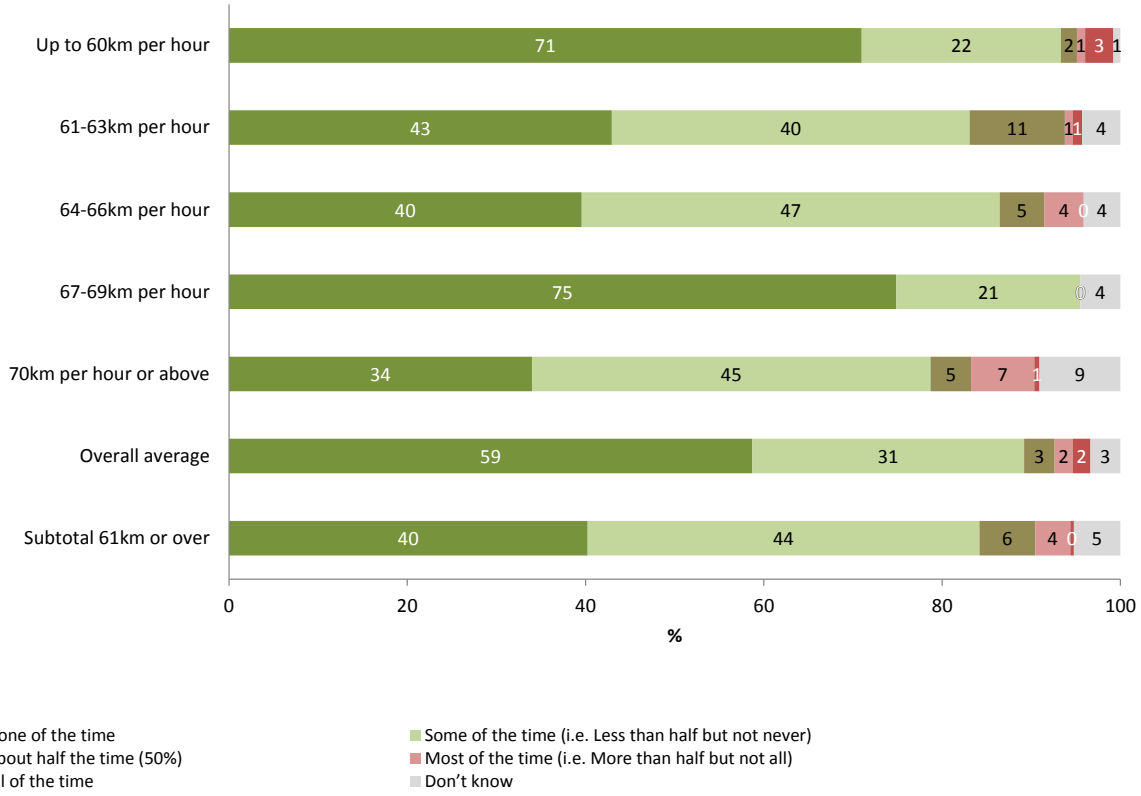


Q51 How fast should people be allowed to ride a motorcycle in a 60kph zone without being booked for speeding?
Filtered: Active riders; Weighted; 2012 base n =; 359 2013 base n =405; 2014 base n = 549;

Respondents were asked how often they rode at or above the speed they had nominated. The frequency at which respondents in 2014 would ride their motorcycle above their nominated speed is shown in Figure 39. Seven in ten (71%) of those who said people should only be able ride at 60km or lower in a 60km zone said they would never go above this speed. Approximately, one in five (22%) said they would go over this speed some of the time.

Among the 36% of respondents who nominated speeds greater than 60km per hour, 40% said they would *never* rider faster than the speed they nominated if they had the opportunity. More than four in ten (44%) reported going over this speed *at least* some of the time. This suggests that those who thought there should be more leeway in speed zones tended to say they would act upon it if the opportunity presented itself (at least some of the time).

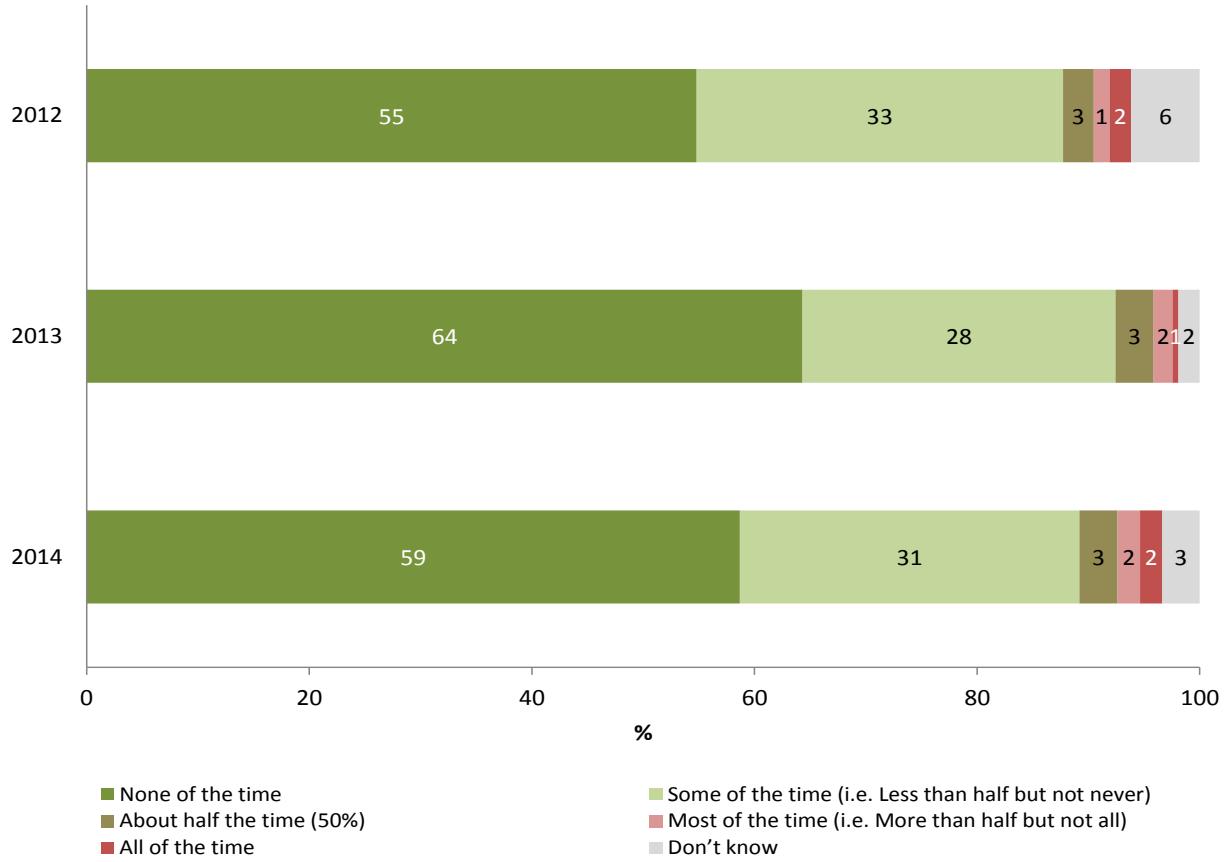
Figure 39: Speed people should be allowed to ride a motorcycle in a 60kph zone without being booked for speeding and frequency they would ride above this speed - 2014



Q51 How fast should people be allowed to ride a motorcycle in a 60 km per hour zone without being booked for speeding?
Q52a When you have the opportunity, how often do you ride above 60km per hour in a 60kph zone?
Filter: Active riders; Weighted; 2014 Base n = 549

Regardless of the speed nominated, the majority of respondents who had ridden in the last 12 months reported they would never ride above the speed limit they felt people should be able to ride at without being booked (59%). One in three (31%) reported they rode above the speed at least some of the time. These results are similar to those found in 2013.

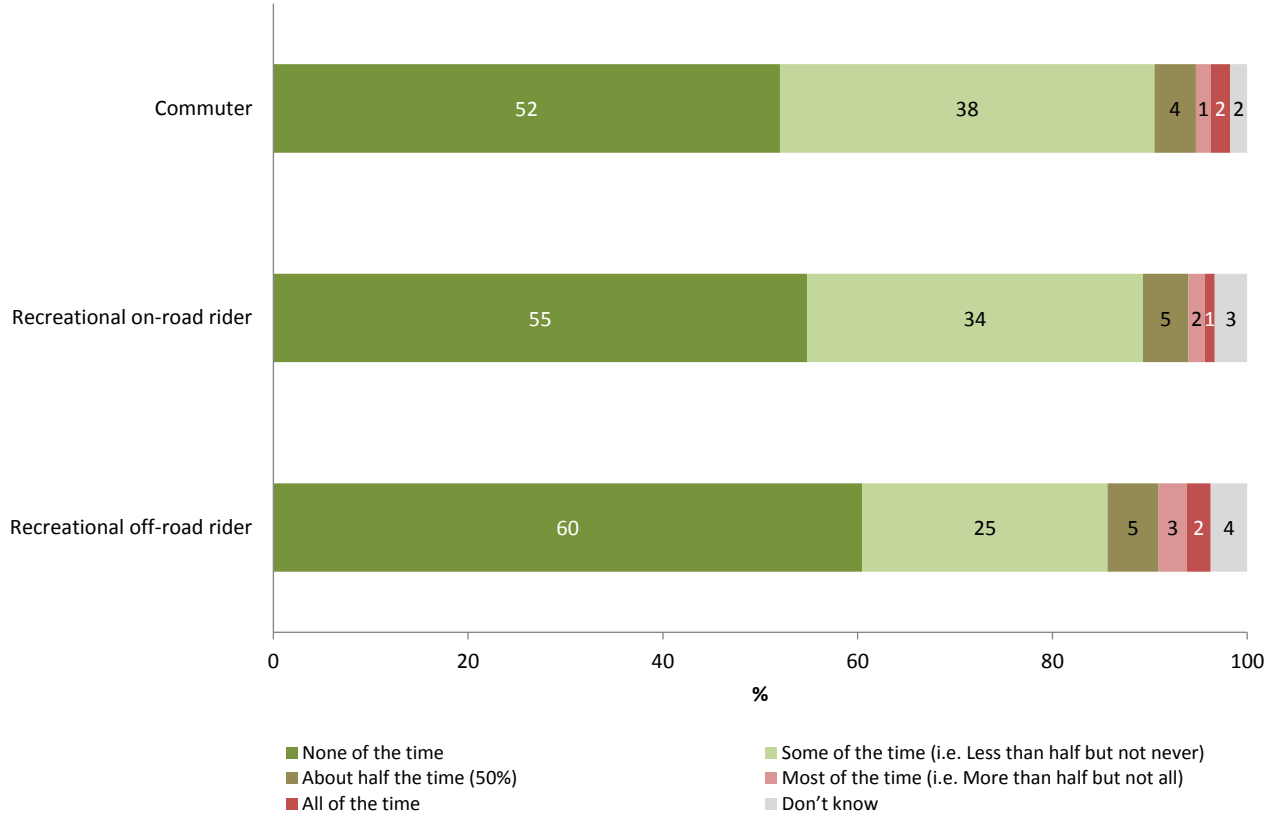
Figure 40: Frequency respondents would ride above nominated speed in a 60km zone – 2012-2014



Q52 & Q52a When you have the opportunity, how often do you ride above X km per hour in a 60kph zone?
Filter: Active riders; Weighted; 2012 Base n = 359; 2013 Base n=381; 2014 Base n=563

A higher proportion of those who had done any off-road riding for recreational purposes in the last year said they never rode above their nominated limit (60% compared to 55% of those who did some recreational on-road riding and 52% of those who did some commuting) (See Figure 41).

Figure 41: Frequency respondents would ride above nominated speed in a 60km zone by riding purpose - 2014

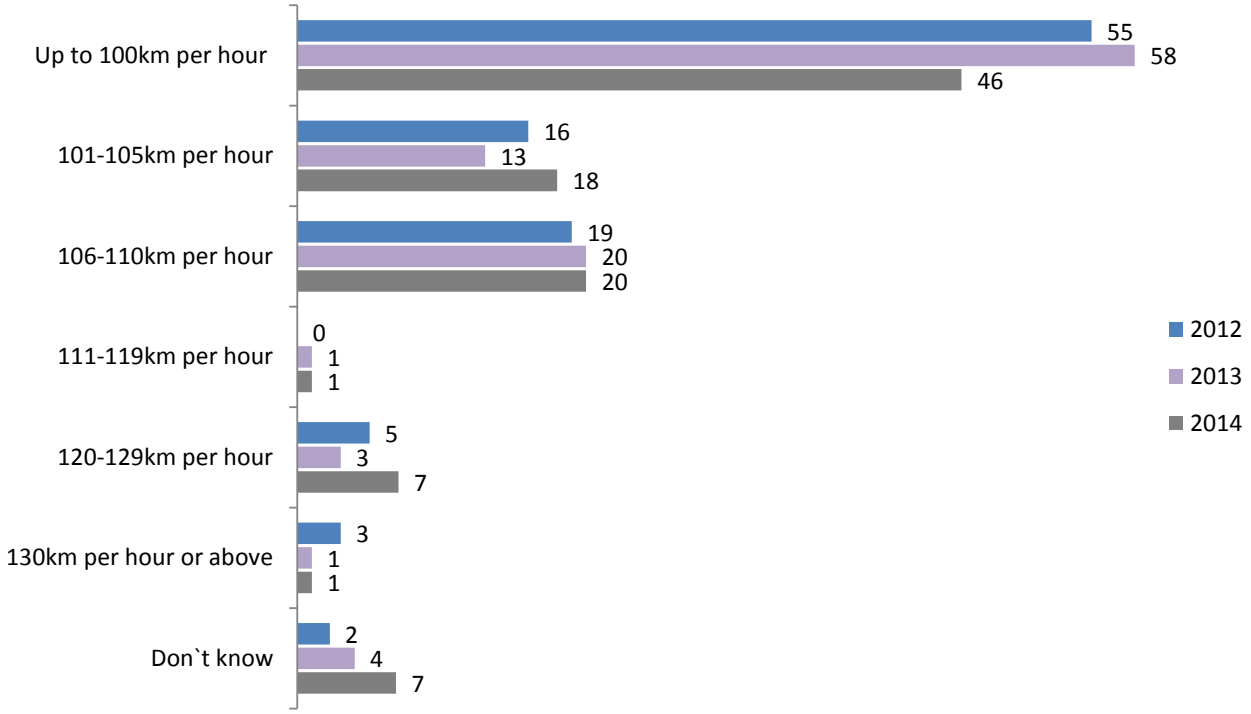


Q52 & Q52a When you have the opportunity, how often do you ride above X km per hour in a 60kph zone?
Filter: Active riders; Weighted; 2014 Base n = 563

Speed limit in a 100km zone

When asked how fast people should be able to ride in a 100km zone without being booked, just under half (46%) said that you should only be able to ride 100 km per hour or less. A fifth (20%) nominated a speed of 106-110km per hour. Compared to the previous year, there was a significant decrease in those who nominated the sign posted speed limit or less compared to 2013 (58%).

Figure 42: Speed people should be allowed to ride a motorcycle in a 100kph zone without being booked for speeding - 2012-2014



Q53 How fast should people be allowed to ride a motorcycle in a 100kph zone without being booked for speeding?
Filter: Those ridden in the last 12 months; Weighted; 2012 base n = 348, 2013 base n=468; 2014 Base n = 550

Similar to responses to the same question in relation to 60km zones, males were less likely to nominate a speed of 100km or less (43% vs. 68% of females) (See Table 33). Notably, one in four of those aged 18-25 reported that a speed of between 101-105km should be acceptable before being booked for speeding in a 100km zone.

Table 33: Speed people should be allowed to ride a motorcycle in a 100kph zone without being booked for speeding by selected demographic characteristics - 2014

Column %	Gender		Age		
	Male (n=472)	Female (n=110)	18-25 (n=201)	26-39 (n=168)	40+ (n=213)
Up to 100km per hour	43↓	68↑	42	46	46
101-105km per hour	18	23	27↑	19	17
106-110km per hour	22↑	5↓	21	22	19
111-119km per hour	1	0	1	0	1
120-129km per hour	7	1	3	7	7
130km per hour or above	1	0	1	3↑	0↓
Don`t know	7	3	4	2↓	9↑
Subtotal - 101km per hour or above	50↑	29↓	53	52	44

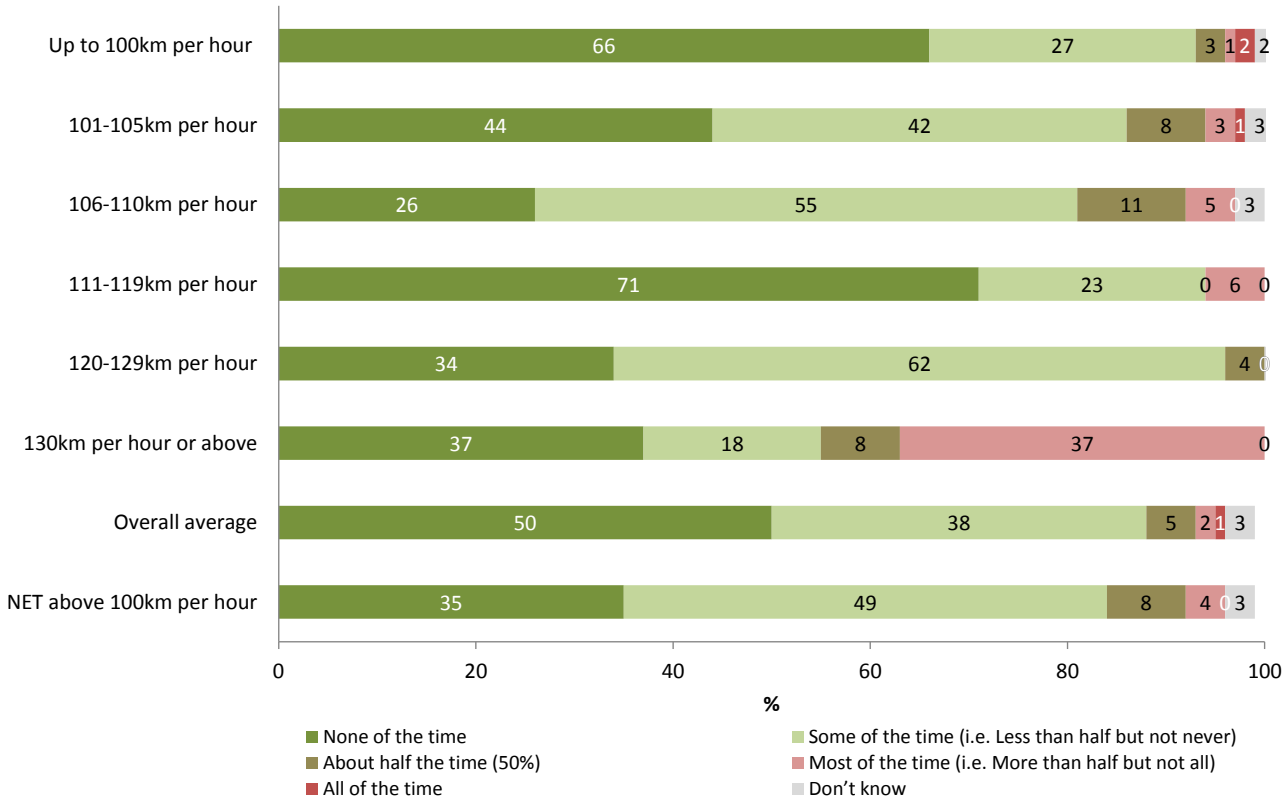
Q53 How fast should people be allowed to ride a motorcycle in a 100kph zone without being booked for speeding?
Weighted; Base n = 582-583
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Overall, the average speed respondents said you should be able to ride without being booked was 104.8 km per hour in 2014 (similar to that reported in 2013 at 104km).

Those who had been involved in an accident while riding a motorcycle were more likely to nominate a higher average speed of 105.8km per hour (vs 104km per hour for those who have not experienced a crash). However, it should be noted that those who had experienced a crash rode more frequently on average than those who had not been involved in a crash so this would most likely reflect their riding experience. In 2014, no significant differences were observed among riders according to the bike they mainly rode.

The frequency at which respondents rode their motorcycle above the speed they nominated as permissible in a 100 km per hour zone is shown in Figure 43. Two-thirds of those who said people should only be able to ride up to 100km per hour in a 100 zone would never ride above this speed (66%). In comparison, those who nominated a speed higher than 100km, were less likely to say they would never go above this speed (35%).

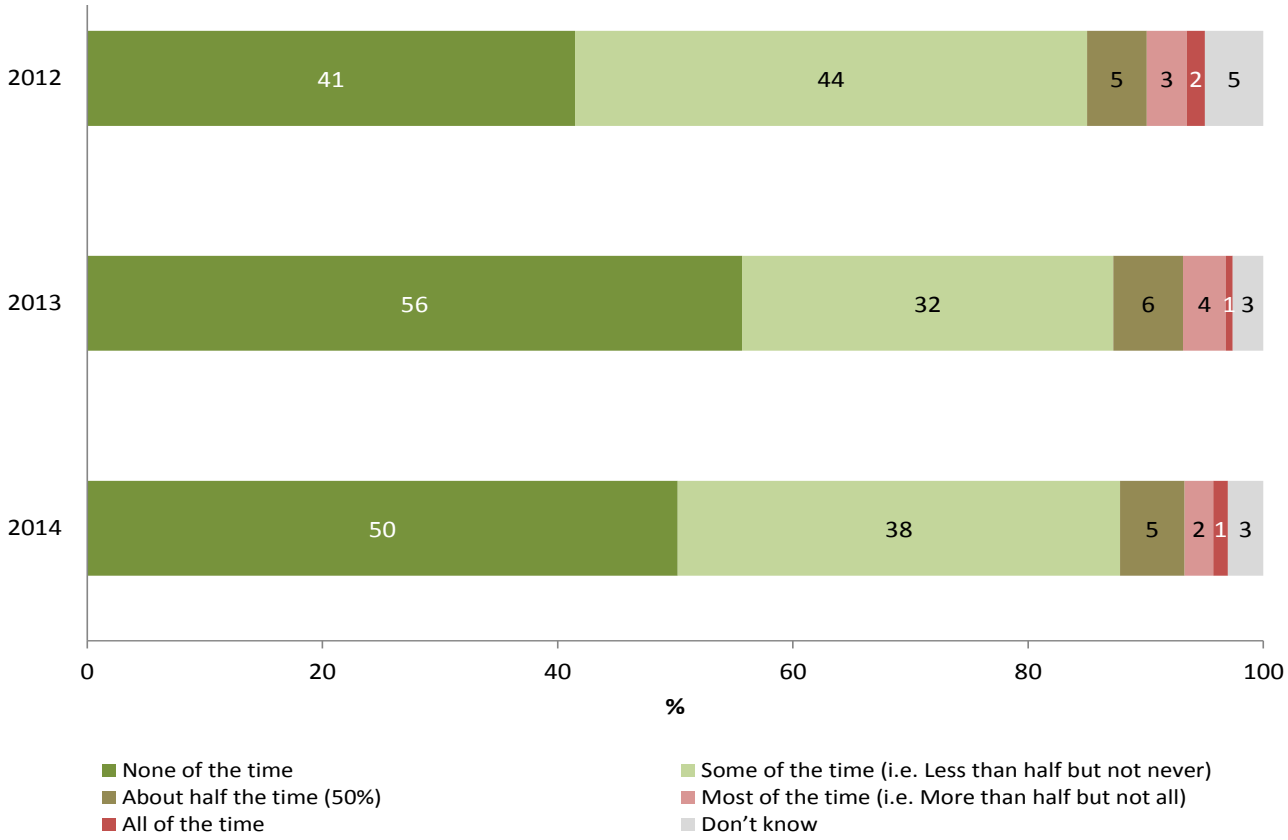
Figure 43: Speed people should be allowed to ride a motorcycle in a 100kph zone without being booked for speeding and frequency they would ride above this speed - 2014



Q54 & Q54a When you have the opportunity, how often do you ride above X kph in a 100kph zone?
Filter: Active riders; Weighted; 2014 Base n =563

Regardless of the speed nominated, half of respondents who had ridden in the last 12 months reported they would never ride above the limit they felt people should be able to ride at without being booked (50%). More than one in three (38%) reported they rode above the speed they nominated at least some of the time. The results for 2014 are similar to those found in 2013.

Figure 44: Frequency respondents would ride above nominated speed in a 100km zone – 2012-2014

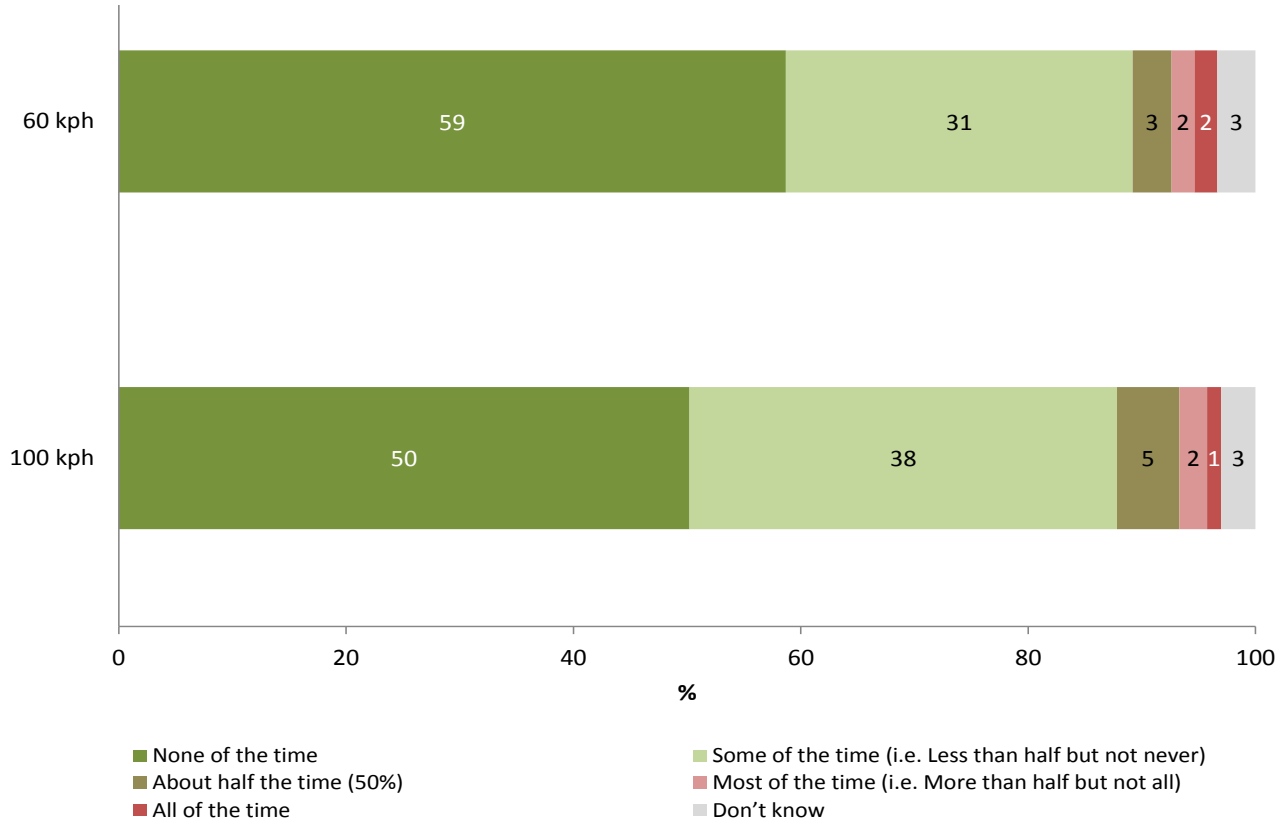


Q54 & Q54a When you have the opportunity, how often do you ride above X kph in a 100kph zone?
Filter: Ridden in the last 12 months; Weighted; 2012 Base n=359; 2013 Base n = 382; 2014 Base n = 563

When comparing attitudes towards speeding in the two zones (regardless of the speed they nominated as the point where people should be booked), more riders tended to report they would never ride above the speed limit in a 60km zone (59% vs. 50% in a 100km zone) and were more likely to ride above the speed they nominated at least 'some of the time' when referring to a 100km zone (38% in a 100km zone vs. 31% in a 60km zone) (See Figure 45).

While this should be of concern, it should be also noted that these results are consistent with attitudes towards speed among car drivers where reported speeding was more prevalent in the higher speed zones.

Figure 45: Frequency respondents would ride above nominated speed in a 60km zone compared to a 100km zone – 2014



Q52 & Q52a When you have the opportunity, how often do you ride above X km per hour in a 60kph zone?
Q54 & Q54a When you have the opportunity, how often do you ride above X kph in a 100kph zone?
Filter: Active riders; Weighted; Base n = 563

7. Random Breath and Drug Testing

Close to one in five active riders said they had been randomly breath tested (19%). Only 2% of this group said they believed they had been through a random drug test.

Random breath testing was more common among those who rode more than 20% of the time compared to driving, those who commuted, and rode bikes with bigger engines (700cc+).

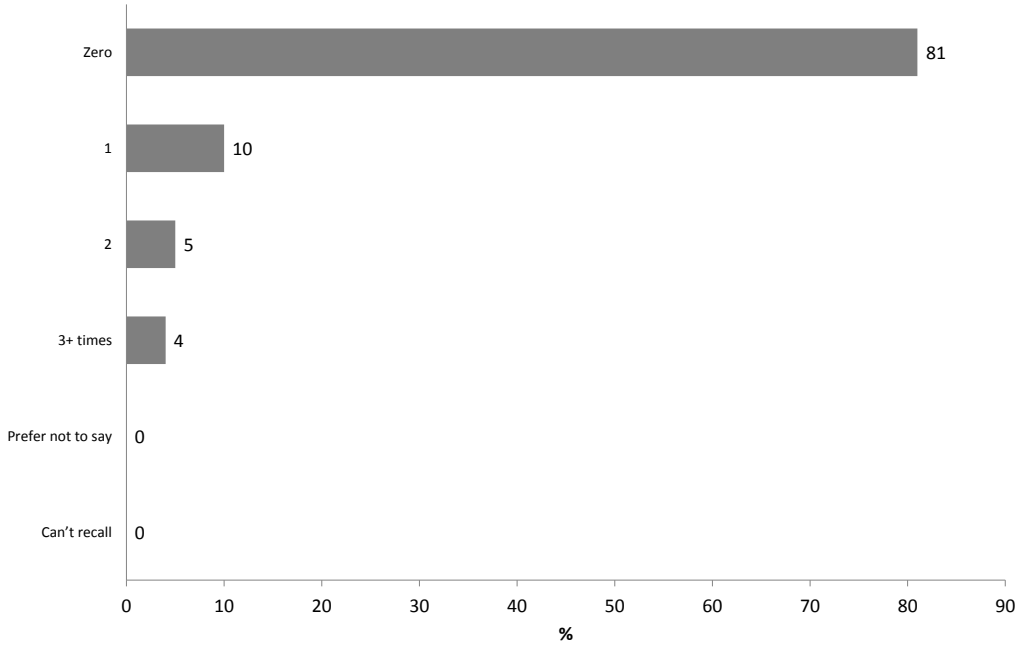
Almost all respondents said they had not ridden their motorcycle when they knew or thought they may have been over the limit (92%) with an additional 6% who said they did not drink at all. Among those who said they may be been over the limit when they had been riding some of the reasons included perhaps being over the limit due drinking the night before, only riding a short distance, or they had no other alternative transport (or did not want to leave their bike behind).

Respondents were asked about their experiences in relation to random breath testing and random drug testing (RBT and RDT) and their motorcycle riding behaviour when they knew or thought they might be over the legal blood alcohol limit.

The vast majority of active riders (81%) had not been breath tested in the last 12 months. Nineteen percent (19%) reported having been breath tested, half of whom had been breath tested just the once (see Figure 46).

Those who did more riding (i.e. they rode more than 20% of the time compared to driving) (37%), those who commuted (28%), rode recreationally on-road (23%), rode a bike of 701cc+ (30%) were more likely to report being breath tested in that time period.

Figure 46: Proportion of active riders breath tested - 2014 only



Q48a In the last 12 months, how many times, if any have you been breath-tested when riding your motorcycle?
Filter: Active riders; Weighted; Base n = 511
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Few respondents had been drug tested while riding a motorcycle in the last 12 months (2% of active riders). Of the n=6 who had taken a drug test during this time period, there was some confusion with four respondents saying it had been a breath test and only two saying it had been a saliva test.

Riding when over the limit

More than nine in ten (92%) respondents said they had not ridden their motorcycle when they knew or thought they might possibly have been over the legal blood alcohol limit and a further 6% reported they did not drink at all.

Of the n=14 people who thought they may have/had done so, respondents had a number of reasons for doing so including they had drunk the night before riding their motorcycle and may consequently have been over the limit, that they were riding a short distance, they did not want to leave their bike, or had no other options, were not thinking straight, or that they were riding on private property.

8. Motorcycle/scooter ownership

Respondents were asked about the details of up to four bikes that they rode most often; including the type of bike, make/brand, year of manufacture, engine size and ownership status. Respondents were asked to exclude bikes they had not ridden in the last 12 months or were not planning to ride in the next year.

More than half of *all* respondents (56%) did not have a motorcycle at home. Approximately one in three reported having only one bike at home (30%) with one in five reporting they had 2-4 bikes at home (22%). A minority of respondents had five or more motorcycles at their home address (4%).

The most common type of bike active riders said they mainly rode was a road bike (65% of active riders mainly rode a road bike vs. 60% in 2013). Fewer reported they mainly road an off-road/trail bike compared to 2013 (25% vs. 33% in 2013) with similar levels as reported in 2012 (23%). Eight percent (8%) of respondents rode a scooter (vs. 3% in 2013).

The most common brands were Yamaha, Honda, followed by Harley Davidson motorcycles with one in three active riders riding motorcycles manufactured between 2010-2014 (36%).

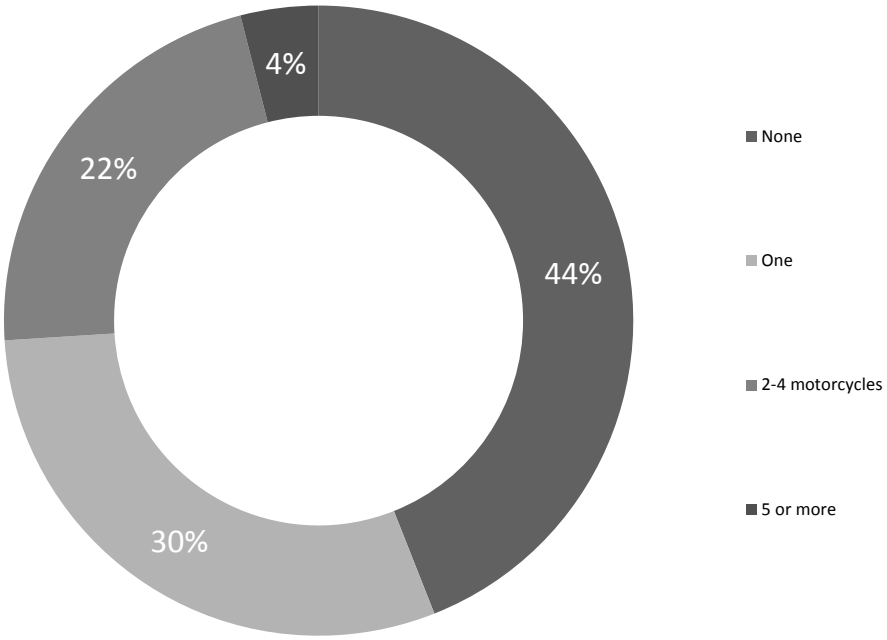
Forty percent (40%) reported they were considering purchasing a motorcycle in the future with half intending to do so within the next 12 months. One in three respondents were considering buying a new bike (30%), 44% were considering a used motorcycle, with the remainder undecided (33%). The majority of those thinking of buying another bike were planning on buying a road bike (76%). Half of these respondents intended to look for Antilock braking system (ABS) for their new bike (53%).

8.1 Number of motorcycles in household

In 2014, under half (44%) of respondents indicated they did not have a motorcycle at their home address.

Under one in three (30%) reported having only one motorcycle in their household. A further 22% reported having between 2-4 motorcycles, and a very small percentage (4%) had five or more bikes at their home address.

Figure 47: Number of motorcycles kept at home - 2014 only



Q15. How many motorcycles are kept at your home address regardless of who owns them or registration status?
Filter: all respondents; Weighted; 2014 base n=784

Active riders were more likely to have at least one bike in their household (90%), with the vast majority of lapsed and former riders not having access to a bike (82% and 98% respectively) (See Table 33).

Table 34: Number of motorcycles kept at home by rider activity segment - 2014

Column %	Rider activity segment		
	Active riders (n=511)	Lapsed riders (n=232)	Former riders (n=31)
None	10↓	82↑	98↑
One motorcycle	45↑	13↓	0↓
2-4 motorcycles	38↑	4↓	2↓
5 or more motorcycles	7↑	1↓	0

Q15 How many motorcycles are kept at your home address?
All respondents; Weighted; 2013 Base n = 774
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Looking at socio-economic variables, those who lived in the *least* disadvantaged areas of Victoria (SEIFA quintiles 4 and 5) were significantly *less* likely to own two or more motorcycles than average (22% compared to 33% for those in quintile 3 and 32% in quintile 1 and 2) (See Table 35).

Table 35: Number of motorcycles kept at home by SEIFA quintiles

Column %	Quintile 1 and 2 (n=228)	Quintile 3 (n=149)	Quintile 4 and 5 (n=399)
None	36↓	47	46
One motorcycle only	32	20↓	31
Two or more motorcycles	32	33	22↓

Q15 How many motorcycles are kept at your home address?
Filter: All respondents; Weighted; Base n = 776
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

8.2 Details of motorcycle ridden most often

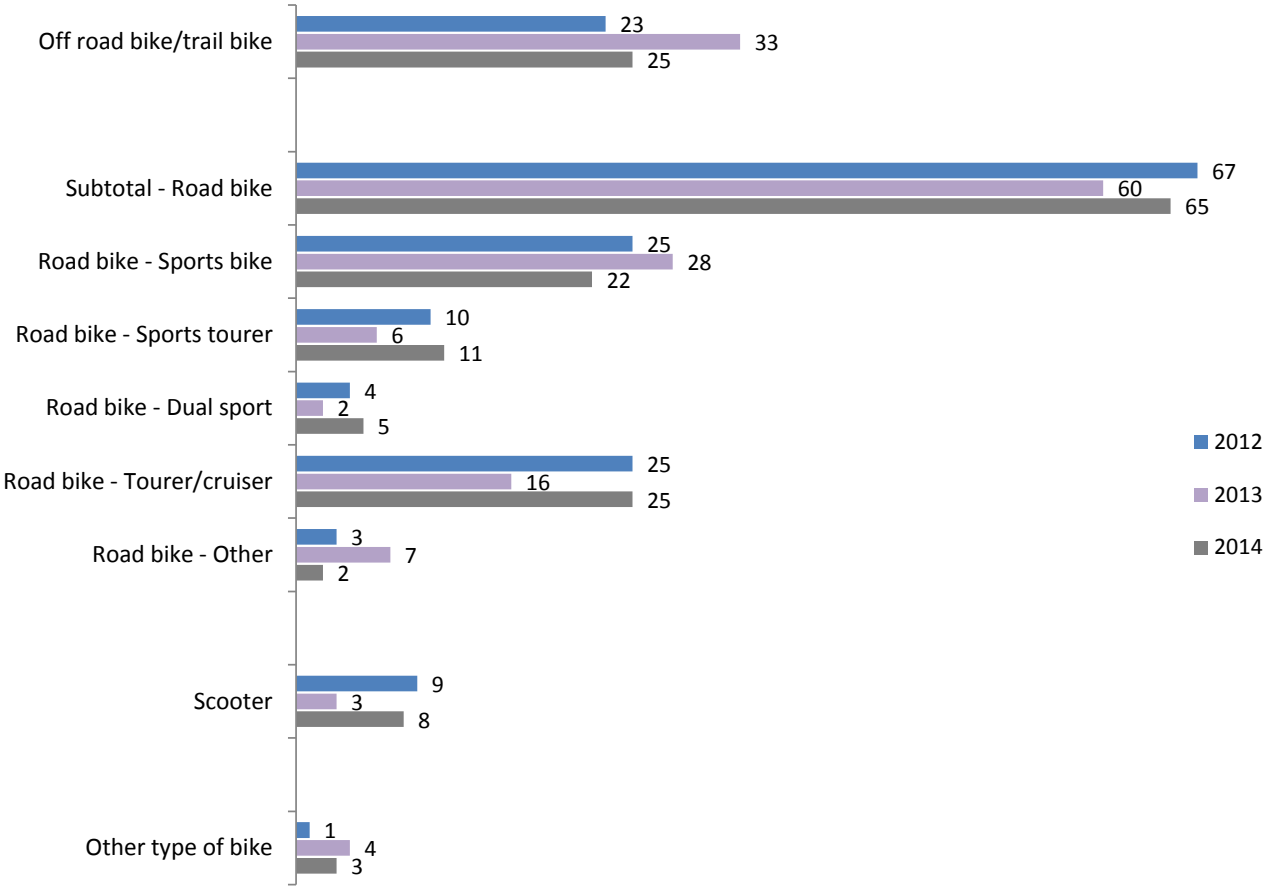
Type of motorcycle mainly ridden

In comparing the main type of motorcycle ridden by active riders in 2013 and 2014, the types of bikes ridden were broadly similar with few significant differences.

The majority (65%) rode an on-road bike, while just over a quarter said they rode an off road/trail bike (25%). In 2014, significantly more respondents said they rode a scooter compared to in 2013 (8% vs. 3%), but at similar levels to 2012 (9%).

In 2014, of the types of road bikes ridden, 25% reported mainly riding a tourer/cruiser, followed by just over two in ten active riders specifically saying they mainly rode a sports bike (22%),

Figure 48: Type of bike (Main motorcycle) - 2012-2014



Q16 Please provide details of the motorcycle you ride most of the time – Type of bike
Filter: Active riders and keep at least one bike at home; Weighted; 2012 base n = 329; 2013 base n=350; 2014 Base n = 450

There were some differences in the types of motorcycles mainly ridden among the active rider segment (See Table 36). These included:

- Male riders, those aged 18-25 and learner/probationary licence holders were more likely to own a sports bike (23%, 42% and 41% respectively).
- Off-road bikes/trail bikes were more popular among those aged 26-39 (35%) and those living in regional Victorian locations (32%).
- Scooters were also more prevalent among females than males (19% vs. 6%).

Table 36: Type of bike (Main motorcycle) by selected characteristics - 2014

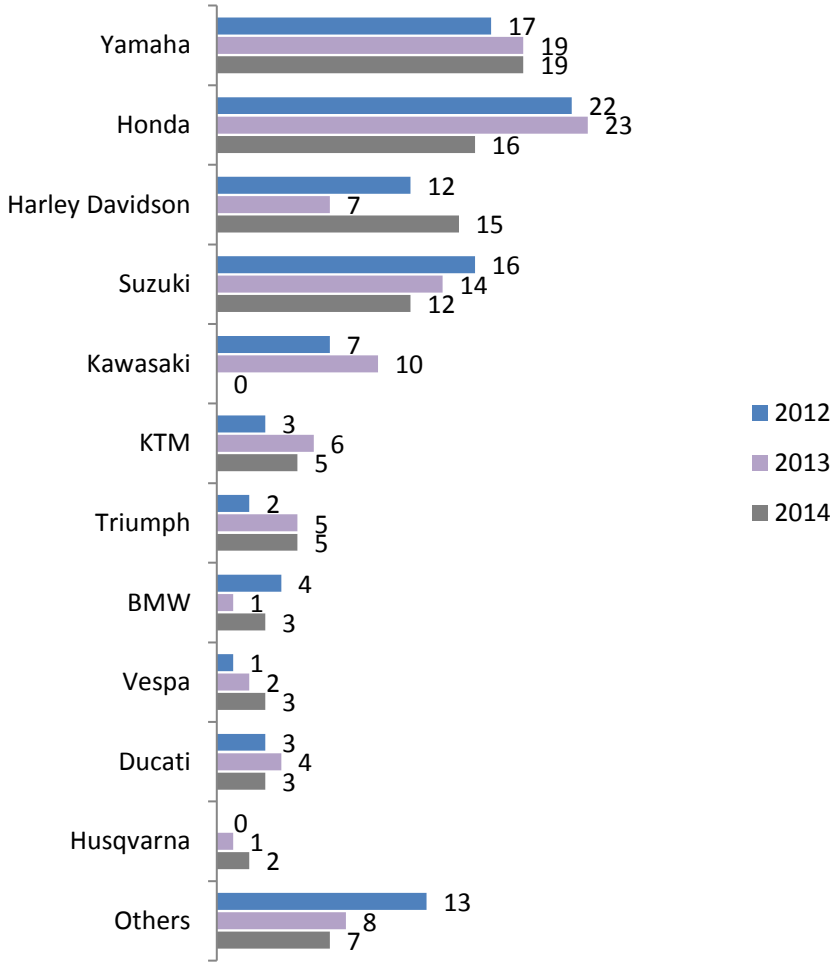
Column %	Gender		Age			Location		Licence type	
	Male (n=408)	Female (n=104)	18-25 (n=178)	26-39 (n=140)	40+ (n=194)	Melbourne (n=294)	Balance of Vic. (n=219)	Learner/ probationary (n=142)	Full licence (n=359)
Off road bike/trail bike	24	30	32	35↑	20↓	20↓	32↑	29	24
Subtotal - Road bikes	67↑	45↓	61	53↓	70↑	67	61	58	66
- Sports bike	23↑	7↓	42↑	28	17↓	24	19	41↑	20↓
- Sports tourer	12↑	1↓	6	6	14↑	9	14	4↓	12↑
-Tourer/cruiser	5↑	1↓	2	2	6	7	2	1	5
- Dual sport	25	31	10↓	14↓	32↑	25	25	8↓	27↑
- Other	1↓	6↑	2	3	2	3	1	4	2
Scooter	6↓	19↑	5	11	7	11↑	3↓	12	7
Other type of bike	2	6	1	2	3	2	4	1	3
Don't know	0	0	0	0	0	0	1	0	0

Q16 Please provide details of the motorcycle you ride most of the time – Type of bike
Filter: Active riders and keep at least one bike at home; Weighted; Base n = 450
↓↑ *indicates statistically significant difference compared to respondents* ***not*** *in that category*

Make/brand of main motorcycle

In 2014 the three most common brands of motorcycle among active riders were Yamaha, Honda, and Harley Davidson. Those who rode a Harley Davidson increase from 7% to 15% in 2014. Suzuki and Kawasaki motorcycles rounded out the top five brands.

Figure 49: Brand of bike (Main motorcycle) - 2012-2014



Q16 Please provide details of the motorcycle you ride most of the time – Make/brand
Filter: Active riders; Weighted; 2012 base n = 329; 2013 base n = 422; 2014 base n = 513

Year of manufacture of main motorcycle

Newly manufactured motorcycles made in 2010-2014 were ridden by 36% of active riders. Active riders were most likely to ride motorcycles manufactured between 2000 and 2009 (45%).

Younger respondents tended to ride newer bikes (made in 2010-2014 - 48%) (See Table 37).

Table 37: Year of manufacture of main motorcycle by selected rider characteristics - 2014

Column %	Age			Whether had a crash	
	18-25 (n=148)	26-39 (n=111)	40+ (n=143)	Yes (n=167)	No (n=234)
1999 or earlier	15	16	21	19	18
2000-2009	37	45	46	39	51
2010-2014	48↑	38	34	42	31

Q16 Bike ridden most often - Year of manufacture
Filter: Active riders who kept at least one bike at home; Weighted; Base n = 447 to 448
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Note: Telephone and online surveys only

Learner and probationary licence holders were also significantly more likely to say they rode a motorcycle made in 2010-2014 (52% compared to 34% of full licence holders). The same was found for those who rode 20% or more of the time (48% compared to 30% of those who rode less than 20% of the time).

Table 38: Year of manufacture of main motorcycle by selected rider characteristics - 2014

Column %	Licence		Time spent riding vs. driving	
	Learner/ Probationary (n=119)	Full licence (n=279)	Ride less than 20% (n=261)	Ride 20% or more (n=160)
1999 or earlier	12	20	22	13
2000-2009	35	46	47	39
2010- 2014	52↑	34↓	30↓	48↑

Q16 Bike ridden most often - Year of manufacture
Filter: Riders who owned at least one bike; Weighted; Base n = 394-446
↓↑ indicates statistically significant difference compared to respondents not in that category
Note: Telephone and online surveys only

In 2014, respondents were asked what year the bike they ride most often was purchased. More than half (59%) of the respondents purchased their bike between 2010 and 2014. A quarter (28%) purchased their bike between 2005 and 2009 and 13% in 2000 or earlier.

Table 39 shows the vintage of the bike that people bought. Six in ten of those who had purchased their bike in 2010-2014, had brought a relatively new bike (57% of the bikes were also made in 2010-2014).

Table 39: Year of purchase and year of manufacture (2014)

	Year of purchase				
Year of manufacture	**1999 or earlier**	**2000-2004**	**2005-2009**	**2010-2014**	**NET**
1999 or earlier	100↑	21	21	8↓	19
2000-2009	0↓	79↑	79↑	34↓	44
2010-2014	0↓	0↓	0↓	57↑	37
NET	100	100	100	100	100
Column n	20	12	63	288	383

Q16 Bike ridden most often - Year of manufacture
Q16 Bike ridden most often - Year purchased
Filter: Riders who owned at least one bike; Weighted; Base n = 394-446
↓↑ *indicates statistically significant difference compared to respondents not in that category*
Note: Telephone and online surveys only

Odometer reading

Respondents were also asked the odometer reading on the bike they mainly ride. Among those who were able to answer this, responses were fairly evenly spread out, with the highest share of respondents (22%) stating the odometer read between 10,001 to 20,000km (see Table 40). The average odometer reading was 24251.8km.

Table 40: Odometer reading on bike mainly ridden - 2014

Column %	**% 2014**
Up to 500	3
501-1,000	3
1,001-2000	7
2,001-5000	14
5,001-10000	17
10,001-20000	22
20,001-30000	9
30,001-50000	12
50,001+	12

Q16viii. What is the odometer reading on the bike you mainly ride?
Active riders who own at least one motorcycle; Weighted; 2014 Base n = 391
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

As expected, newer motorcycles tended to have lower odometer readings in general with an average of 8934km on the 'clock' for bikes made between 2010-2014. Motorcycles made prior to 1999 had an average of over 50,000km on the odometer.

Table 41: Odometer reading on bike mainly ridden by year of manufacture- 2014

Column %	1999 or earlier (n=64)	2000-2009 (n=152)	2010-2014 (n=143)
Up to 500	0	1	4↑
501-1,000	1	0↓	7↑
1,001-2000	0	7	13↑
2,001-5000	0↓	15	22↑
5,001-10000	6↓	13	29↑
10,001-20000	21	26	16
20,001-30000	8	15↑	3↓
30,001-50000	31↑	13	5↓
50,001+	32↑	10	0↓
Average	56,565.5↑	22,644.3	8,934.9↓

Q16viii. What is the odometer reading on the bike you mainly ride?
Those who own at least one motorcycle; Weighted; 2014 Base n = 359 (excludes don't know or refused)
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Among those who knew the year of manufacture and the odometer reading for the motorcycle they rode most often, clocked an average of 2484.8 km per year on the odometer. Fourteen percent (14%) reported an average of up to 500km per year. Four in ten (43%) clocked an average of 501-2000km per year. One in ten (11%) reported an average of 5000km or more per year. As expected, off-road bikes had the lowest odometer reading per year with an average of 846.3km. In comparison, road bikes averaged 3022.5km per year and scooters 2121.5 per year since the motorcycle had been manufactured.

Table 42: Odometer reading on bike mainly ridden by per year (based on year of manufacture)

Column %	2014 (n=359)
Up to 100	1
101-500	13
501-1000	18
1001-1500	13
1501-2000	13
2001-2500	11
2501-3000	7
3001-5000	14
5001-10000	9
10001+	2
Average	*2,484.8*

Q16viii. What is the odometer reading on the bike you mainly ride?
Those who own at least one motorcycle; provided year of manufacture and odometer reading Weighted; 2014 Base n = 359 (excludes don't know or refused)
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Engine size of main motorcycle

Motorcycle engine sizes varied among active riders with bikes that had an engine capacity of 701+cc the most common in 2014 (42%, compared to 31% in 2013 – likely due to the increase of Harley Davidson riders in 2014). Nearly one third (30%) of respondents rode bikes with engine capacity of 251-700cc.

Older respondents were significantly more likely to have a motorbike with a larger engine size with 49% having an engine capacity of 701cc or higher compared to 12% of 18-25 year-olds and 20% of 26-39 year olds. This was also the case for recreational on-road riders with 52% having an engine capacity of 701 or higher compared of 22% of recreational off-road riders.

Registration status

Motorcycle owners were also asked the registration status of the bikes kept at their home address. Almost all road bikes or scooters were registered to ride on the road (97% and 100% respectively). Those who rode an off road or trail bike were most likely to have it farm bike registered (31%), followed by 28% who had it road registered (see Table 43).

Table 43: Registration status of main bike (Active riders) - 2014

	Type of bike (main bike)			
Column %	**Off road bike/trail bike (n=119)**	**Road bike (n=276)**	**Scooter (n=38)**	**Total (n=397)**
Road registered	28↓	97↑	100↑	80
Recreational registered	18↑	0↓	0	4
Farm bike registered	31↑	0↓	0	8
Not registered	11↑	0	0	2
Unknown	12↑	3↓	0	5

Q16 Bike ridden most often - Is the bike registered?
Filter: Active riders only; Weighted: base n = 399 to 447
↓↑ *indicates statistically significant difference compared to respondents not in that category*

The age of the active rider's main bike by year of manufacture can be seen in Table 44 below. There were no significant differences between manufacture years.

Table 44: Registration status of main bike by year of manufacture (Active riders) – 2014

Column %	**1999 or earlier (n=75)**	**2000-2009 (n=168)**	**2010-2013 (n=156)**	**Total (n=399)**
Road registered	81	79	83	81
Recreational registered	2	7	4	5
Farm bike registered	7	7	8	8
Not registered	5	3	2	3
Unknown	5	4	3	4

Q16 Bike ridden most often - Is the bike registered?
Filter: Active riders only; Weighted: base n = 399
↓↑ *indicates statistically significant difference compared to respondents not in that category*

Details of other motorcycles ridden in household

Participants who owned more than one motorcycle were asked to list the details of up to three other motorcycles that were kept at their home address, excluding any motorcycles that had not been ridden in the last year or were unlikely to be ridden in the next year. Only 4% of all respondents had more than four motorcycles at home.

As in previous years, the types of motorcycles (other than their main bike) kept by respondents at their home address were similar to their main bikes: 63% of all other bikes were off-road bike/trail bikes and the total proportion of road bikes owned by respondents was 44%.

Table 45 shows that among active riders, the other types of bikes kept at home were usually other models of the main bike they rode. For example, 94% of those who mainly rode an off-road bike owned *other* off road bikes, although one in five (21%) also owned a road bike.

In comparison, road bike owners who owned more than one bike were most likely to own other road bikes (51%) with 55% also having off-road bikes at home.

Table 45: Other types of bikes owned

	Type of bike (Main bike)						
Column %	**Off road bike/trail bike (n=135)**	**Subtotal - Road bikes (n=102)**	***- Sports bike (n=45)***	***- Sports tourer (n=16)****	***- Dual sport (n=8)****	***- Tourer/cruiser (n=42)****	**Scooter (n=9)***
Type of other bikes:							
Off road bike/trail bike	94↑	55↓	83↑	24↓	100↑	33↓	13↓
Subtotal - Road bike	21↓	51	31	55	93↑	51	88↑
- Sports bike	12	15	18	27	21	8	60↑
- Sports tourer	6	11	5	24	25	9	0
- Dual sport	1↓	7↑	2	0	47↑	4	0
- Tourer/cruiser	6↓	19	12	19	0↓	27	72↑
- Other	0	7	0	7	0	10	0↓
Scooter	0	13↑	3	19	0	22↑	8
Other type of bike	4	5	0	3	0	10	7

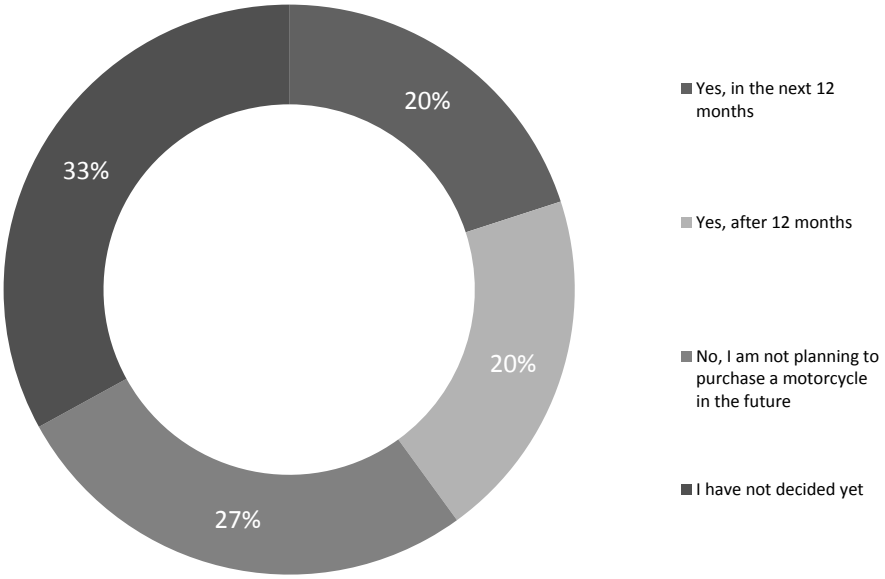
Q17 Other Bike - Type of bike
Filter: Active riders AND Own more than one motorcycle; Weighted; Base n = 450
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
**Note: Small sample sizes*

8.3 Motorcycle purchase intentions

Active riders were asked whether they intended to purchase a motorcycle in the future. In 2014, four in ten respondents (40%) intended to purchase a motorcycle either in the next 12 months or after 12 months (See Figure 50).

Over a quarter (27%) of respondents were not planning on purchasing a motorcycle in the future, with the remainder (33%) undecided. Similar proportions were reported in 2013.

Figure 50: Purchase intentions - 2014



Q30. Are you planning to purchase a motorcycle in the future (either as your first bike, a replacement for or in addition to the one(s) you already have)?
Filter: Active riders only; Weighted; 2014 base n=503

In 2014, 18-39 year olds were significantly more likely to say they planned to buy a bike in the future (57% compared to 31% of those aged 40+).

Likewise, those who lived in regional Victoria tended to say they were not planning to purchase a motorcycle in the future (36% vs. 22% in Melbourne) (See Table 46). One in four (24%) respondents from Melbourne said they were likely to purchase a motorcycle in the next 12 months.

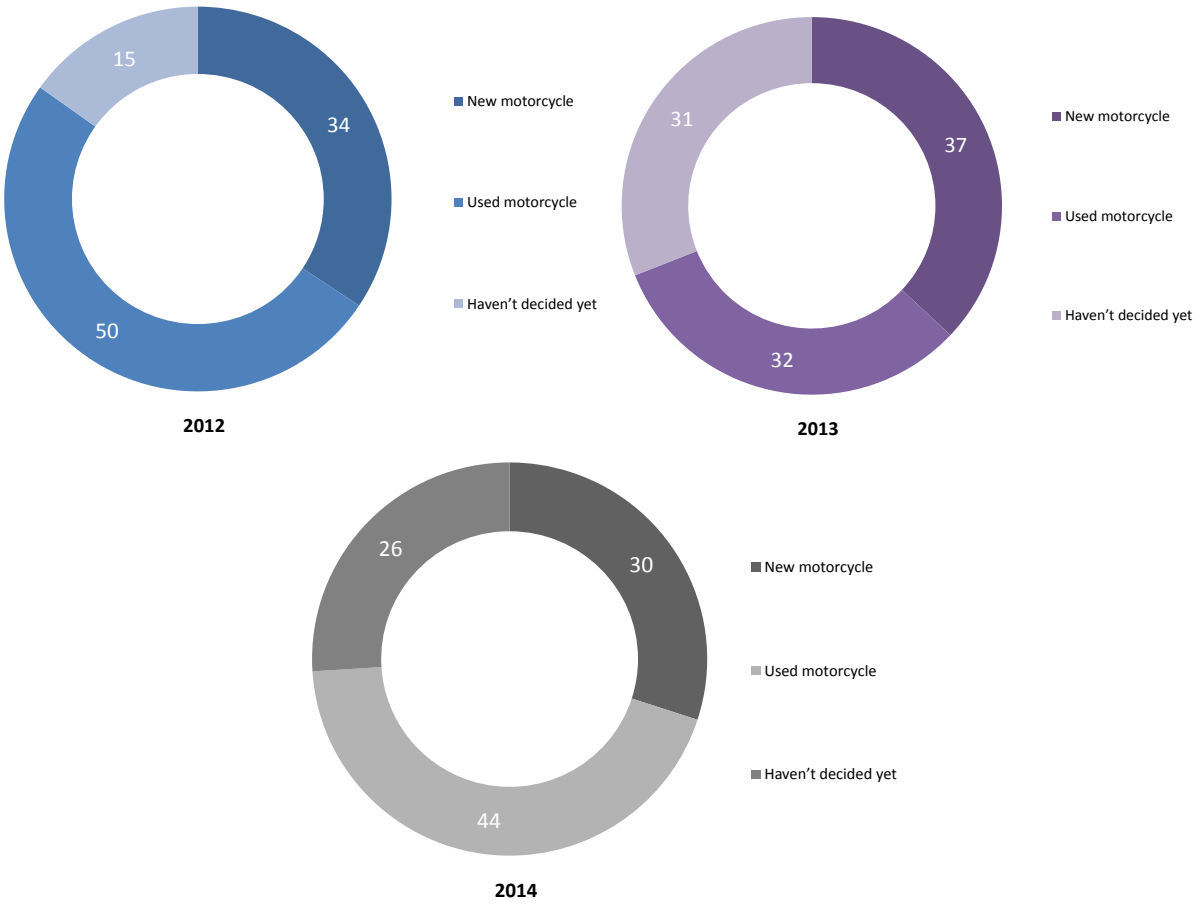
Table 46: Purchase intentions by selected demographics

Column %	Age			Location	
	18-25 (n=184)	26-39 (n=135)	40+ (n=183)	Melbourne (n=290)	Balance of Victoria (n=213)
Total - Yes	62↑	56↑	31↓	43	35
Yes, in the next 12 months	26	29↑	16↓	24	14
Yes, after 12 months	36↑	27	15↓	20	21
No, I am not planning to purchase a motorcycle in the future	15↓	16↓	33↑	22↓	36↑
I have not decided yet	23↓	28	26	35	29

Q30. Are you planning to purchase a motorcycle in the future (either as your first bike, a replacement for or in addition to the one(s) you already have)?
Filter: Active riders; Weighted; Base n =502 to 503
↓↑ *indicates statistically significant difference compared to respondents* ***not*** *in that category*

Respondents who stated that they intended to buy a motorcycle sometime in the future were asked whether they planned to buy a new or used motorcycle. In 2014, there was a higher number of respondents who express the intention to purchase a used motorcycle (44% vs. 32% in 2013), and were less likely to report they hadn't decided yet (26% vs. 31% in 2013) (See Figure 51).

Figure 51: Purchase intention: new or used motorcycle - 2012-2014



Q31 Do you intend to buy a new or a used motorcycle?
Filter: Active riders, Intend to purchase a motorcycle in the future; Weighted; 2012 base n = 197, 2013 base n=233; 2014 base n = 244

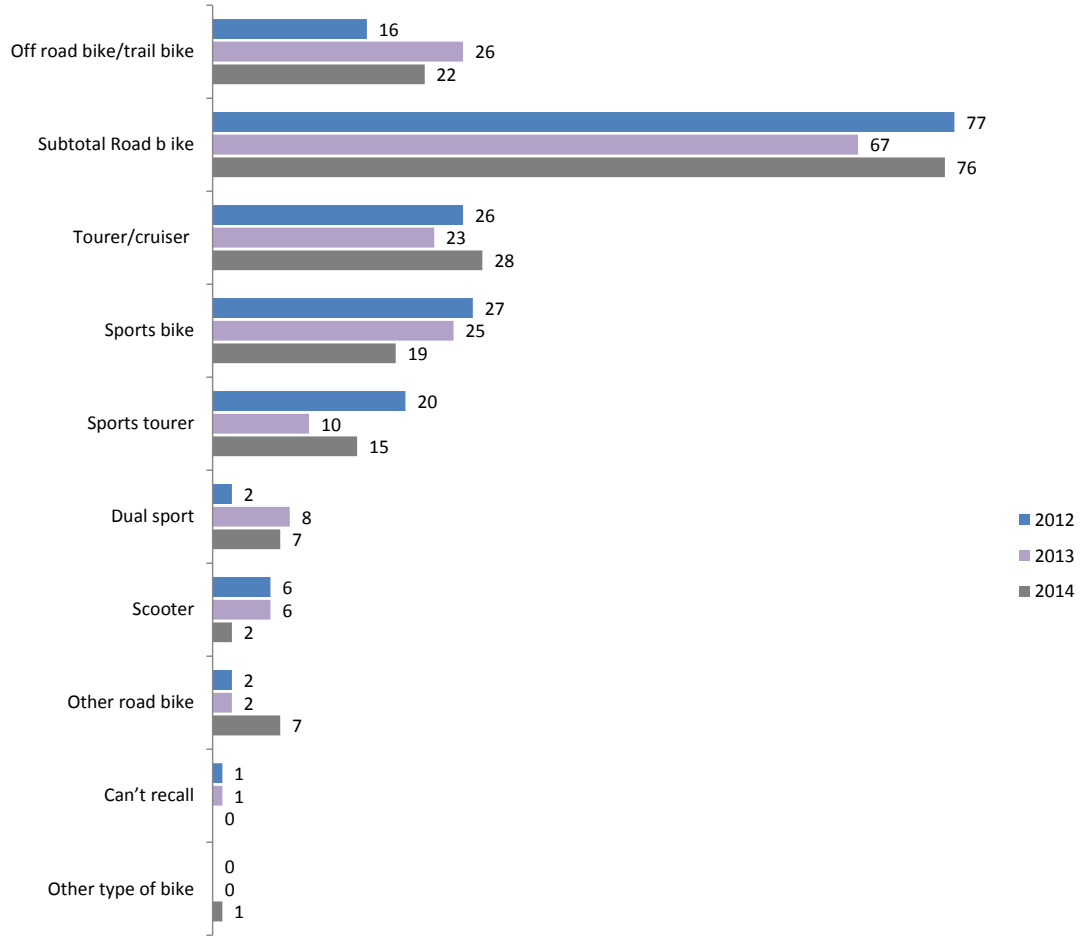
Type of bike

Three quarters of those who were intending to buy a bike in the future said they were likely to buy a road bike of some sort (76%). The most common type of road bike was a tourer/cruiser (28%) followed by a sports bike (19%). Twenty two percent (22%) intended to buy an off-road bike and 2% a scooter.

Respondents who intended to buy a bike were most likely to purchase the same type of motorcycle they currently rode. For example, 55% of those who mainly rode an off-road bike and intended to by another bike in the future said they would buy another off-road bike, 93% of those who mainly rode a road bike intended to buy another of the same.

As with ownership, scooters were more popular among females (10% compared to 1% of males). Those aged 40 or older were significantly more likely to favour a tourer/cruiser (43%) while this type of bike was only favoured by 9% of 26-39 year olds.

Figure 52: Type of bike intending to buy - 2012-2014



Q32. What type of motorcycle do you intend to buy?
Filter: Active riders; Intend to purchase a motorcycle in the future; Weighted; 2012 base n = 197; 2013 base n=233; 2014 base n = 244

Of the 52 respondents who said they intended to buy an off-road or trail bike, more than half (56%) reported they would register the bike with recreational registration and 26% intended to get a full road registration. A significantly higher proportion said they would register their bike as a farm bike (7% compared to 0% in 2013)

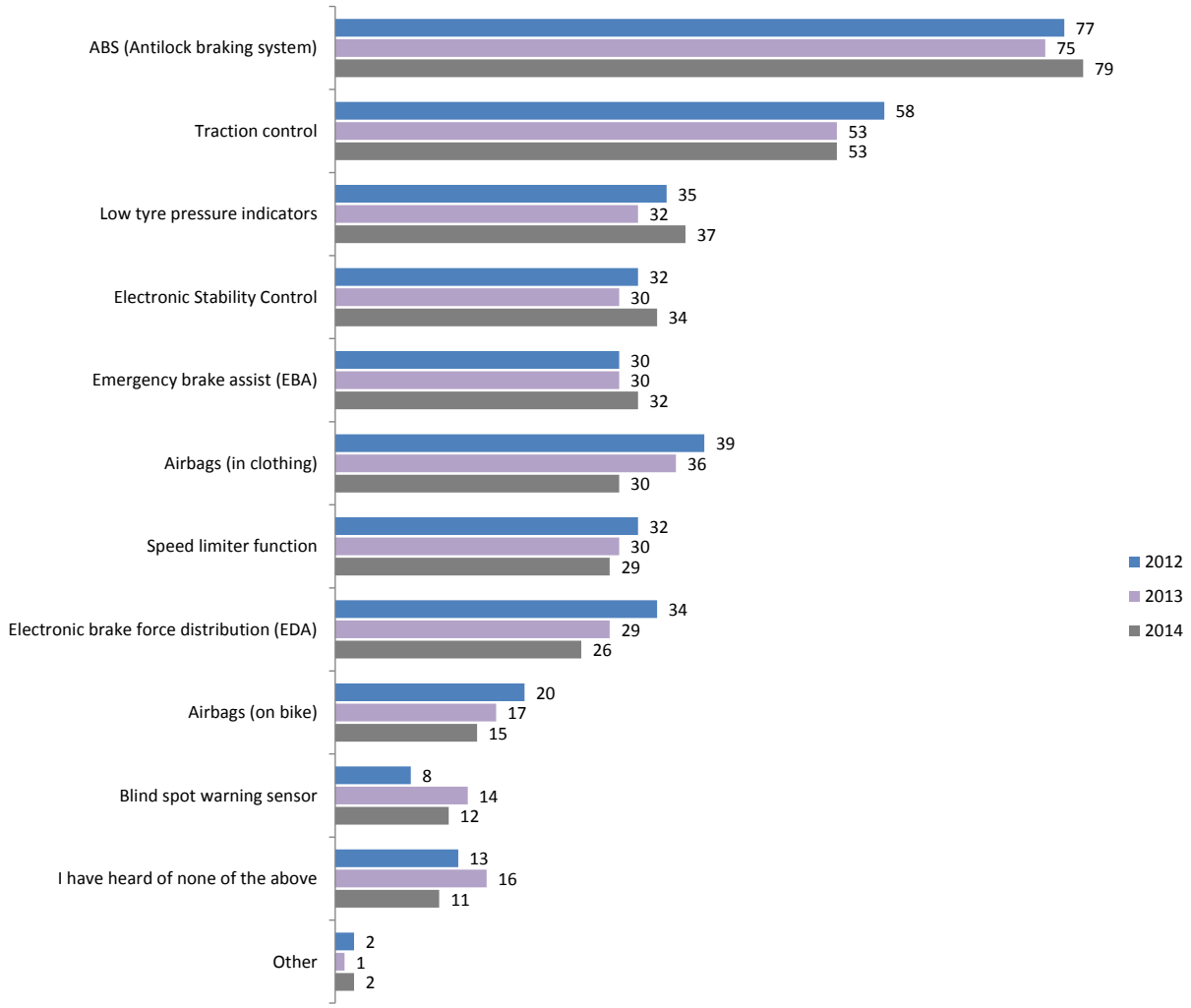
The small percentage (11%, n=2) who did not intend to register their off-road motorcycle stated they did not do so because they did not have to.

8.4 Motorcycle safety features

Active riders were asked if they were aware of a series of safety features currently available on some motorcycles and/or clothing, with results shown in Figure 53. The most common feature that respondents had heard of was ABS (Antilock Braking Systems) (79%). Half of riders had heard of traction control (53%). There were a number of features recalled by around one in three respondents, including: low tyre pressure indicators (37%), electronic stability control (34%), emergency brake assist (32%), airbags (in clothing) (30%) and speed limiter function (29%).

Only 11% of respondents indicated they had not heard of any of the features listed in the survey. There were no significant differences in awareness compared to 2013.

Figure 53: Awareness of motorcycle safety features - 2012-2014



Q36 Have you heard of any of the following motorcycle safety features?
Filter: active riders; Weighted; 2012 base n =359; 2013 base n=405; 2014 base n = 511

Males tended to report higher awareness for a number of the safety features than their female counterparts including ABS (Antilock braking system) (81% vs. 53%), traction control (56% vs. 35%), low tyre pressure indicators (39% vs. 22%), Electronic Stability Control (36% vs. 17%).

Those who had a crash were significantly more likely than those who had not to report they had heard of airbags (in clothing) (37% vs. 22%), airbags (on bike) (21% vs. 9%), and blind spot warning sensor (17% vs. 8%).

Learner/probationary licence holders were also more likely to report having heard of speed limiter function compared to full licence holders (43% vs. 27%).

Only 17% of those with a road bike reported having ABS on their bike, with 76% stating that their bike did not have this feature. This is similar to 2013 (14% reported having ABS on their bike and 79% did not). A minority of respondents were not sure in both 2013 and 2014 (8% and 6% respectively). Female riders were more likely to be unsure (32% vs. 4%).

Among those who intended to buy a road bike in the next 12 months, 53% reported they would look for ABS for their new bike while 19% would not (similar to 2013 at 20%). A further 22% had not decided yet. A minority (7%) were not aware that ABS was available on motorcycles.

9. Protective motorcycle clothing

Active riders were asked about the protective motorcycle clothing they owned, how often they wore protective gear and their future purchase intentions. Additional questions were also included about footwear worn while riding.

Most respondents said they owned at least one helmet, pair of riding gloves or boots, motorcycle jackets, pair of pants or a one piece riding suit (all owned by more than three quarters of active riders). The most common items of protective gear owned were helmets (99% owned at least one); and gloves (owned by 95%).

In total, 71% of active riders reported they had a complete set of protective gear. This has remained constant between 2012 and 2014. However, as in in previous years, ownership of an item of protective gear did not necessarily mean that it was worn every time they rode. Of note, motorcycle specific pants were only worn all the time by just over half of the active riders who owned them (56%).

Almost all respondents (95%) said they wore a motorcycle helmet *all the time*. Eight in ten respondents (80%) reported they wore gloves *all the time*. Riding jackets were worn *all the time* by 62% of respondents. Boots of any type were worn *all the time* by 66% of respondents. Riding pants were least likely to be worn *all the time*– 46% reported they were worn all the time.

Two in three respondents (68%) said they wore either riding boots or other types of boots that cover the ankles all the time. Overall, boots specifically made for riding were worn an average of 64% of the time; other boots were worn on average 27% of the time.

Looking at the number of items worn by active riders (including helmets of any kind), two thirds (64%) of respondents said they wore three or more items *all* the time. This decreased to 37% for four or more items of protective wear. When looking at the number of items worn most or all the time, 86% of respondents reported they wore three or more items all or most of the time.

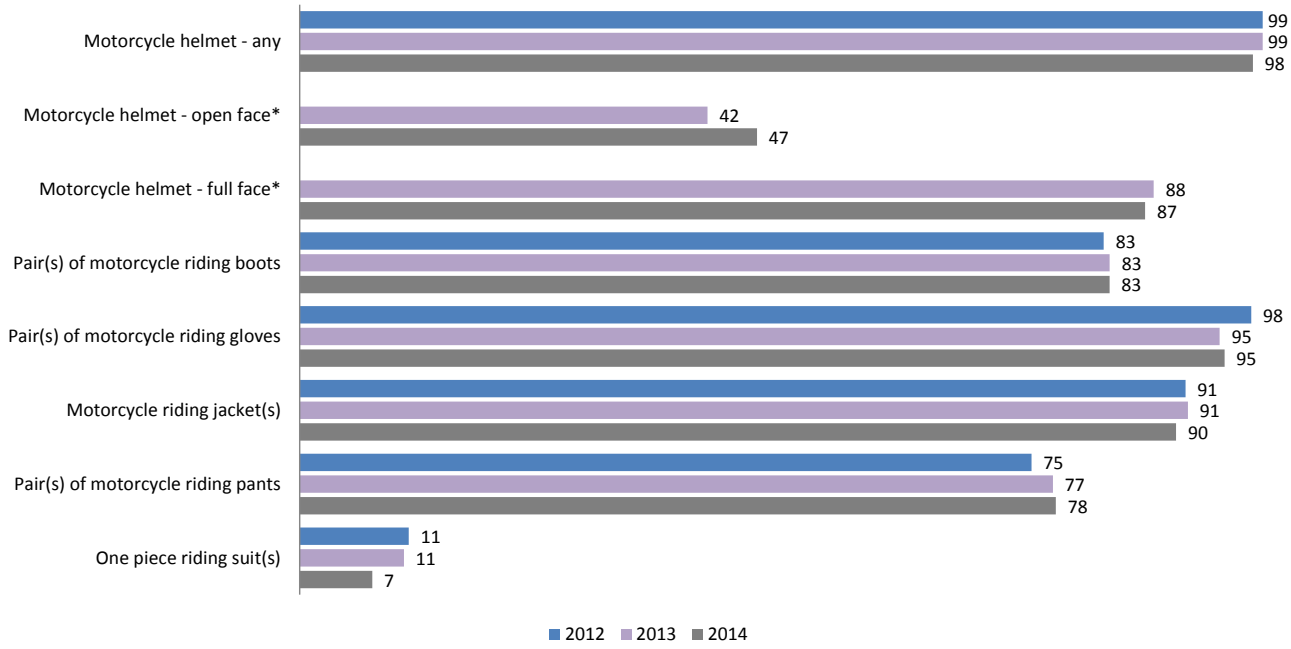
9.1 Protective gear ownership

As in previous years, close to 100% of respondents in 2014 said they owned at least one helmet (99%) and pair of riding gloves (95%).

Close to half (47%) owned an open face helmet and 87% owned a full face helmet. Among those who owned an open faced helmet, three out of four (77%) also owned a full face helmet. Those who only owned an open faced helmet were most likely to be aged between 26-39 years old (46% although the sample size was small (n=34).

In 2014, 90% of respondents owned a motorcycle jacket and 83% owned motorcycle boots. Riding pants were owned by just under four-fifths of respondents (78%) (See Figure 54).

Figure 54: At least one protective motorcycle clothing item owned –- 2012-2014



Q39 How many of the following do you own?
Filter: Active riders; Weighted; 2012 base n = 429; 2013 base n=405; 2014 base n = 511
** Note: the 2012 survey did not distinguish between types of helmet*

In total, 71% of active riders owned a complete set of gear i.e. at least one helmet, pair of riding gloves and boots, jacket and pants (or one piece riding suit). Those living in Melbourne were significantly more likely to own a complete set of gear (75% vs. 64% of those living in regional Victoria) (See Table 47).

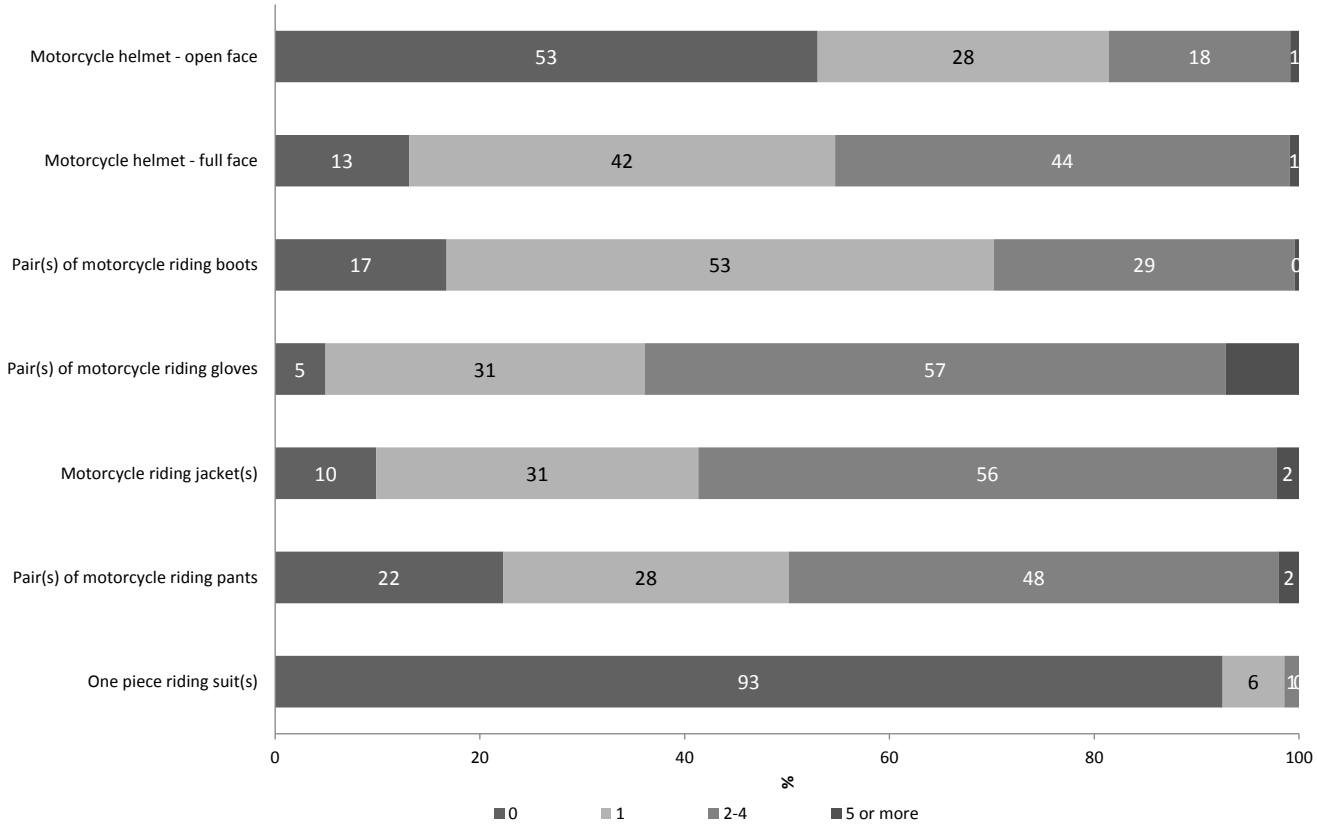
Table 47: Complete set of protective motorcycle – 2012-2014

Column %	2012 (n=359)	2013 (n=405)	2014 (n=511)
Own complete set of gear	68	69	71
Do not own complete set of gear	32	31	29

Q39a-f How many of the following do you own?
Filter: Active riders; Weighted; 2012 Base n = 359; 2013 Base n = 405; 2014 base n = 511
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Respondents were most likely to own at least one pair of motorcycle gloves (95%) or a motorcycle jacket (90%). (See Figure 55).

Figure 55: Number of protective motorcycle clothing items owned - 2014



Q39a-f How many of the following do you own?
Filter: Active riders; Weighted; Base n = 511

On average, those who owned gloves reported having 2.2 pairs. The average number of full face helmets was 1.5 and the average number of open face helmets was 0.7. Respondents owned on average 1.8 motorcycle jackets and 1.6 pairs of riding pants.

Riders on learner or probationary licences tended to own fewer pieces of each item of protective gear. Also, riders who had crashed whilst riding tended to own more items than those who had not – noting that those who had ridden for longer were more likely to have had a crash in the past (see Table 48).

Table 48: Average number of items by rider experience - 2014

Average	Motorcycle licence		Crash while riding motorcycle	
	Learner/ Probationary (n=144)	Full licence (n=359)	Yes (n=206)	No (n=301)
Motorcycle helmet - open face	0.4↓	0.8↑	0.7	0.8
Motorcycle helmet - full face	1.2↓	1.5↑	1.6↑	1.4↓
Pair(s) of motorcycle riding boots	0.9↓	1.3↑	1.5↑	1.1↓
Motorcycle riding jacket(s)	1.2↓	1.9↑	2.1↑	1.6↓
Pair(s) of motorcycle riding pants	1.3	1.6↑	1.8↑	1.3↓
Pair(s) of motorcycle riding gloves	1.7↓	2.3↑	2.6↑	1.8↓
One piece riding suit(s)	0.1	0.1	0.1↑	0.0↓

Q39a-f How many of the following do you own?
Filter: Active riders; Weighted; Base n = 505
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

There was also a correlation between protective gear and the number and types of bikes kept at home. Those who owned more than one motorcycle and those who owned motorcycles with larger engines tended to own more items of motorcycle clothing (See Table 49 below).

Table 49: Average number of items by ownership characteristics - 2014

Average	Type of bike (main bike)			Number of bikes at home			Capacity of main bike		
	Off road bike/ trail bike (n=125)	Road bike (n=281)	Scooter (n=38)*	None (n=49)	1 only (n=234)	2 or more (n=228)	0-250cc (n=174)	251-700cc (n=152)	701+cc (n=126)
Motorcycle helmet - open face	0.5↓	0.8	0.8	0.6	0.5↓	1.0↑	0.6	0.5↓	1.0↑
Motorcycle helmet - full face	1.7	1.6	1.1↓	1.1↓	1.4	1.7↑	1.3↓	1.6	1.7
Pair(s) of motorcycle riding boots	1.3	1.3	0.6↓	0.9	1.1↓	1.5↑	0.9↓	1.4	1.4↑
Motorcycle riding jacket(s)	1.5↓	2.1↑	1.6	1.3↓	1.7	2.0↑	1.4↓	1.7	2.3↑
Pair(s) of motorcycle riding pants	1.6	1.7	0.8↓	1.1↓	1.5	1.7	1.3↓	1.6	1.8
Pair(s) of motorcycle riding gloves	2.4	2.3	1.5↓	1.6↓	1.9↓	2.7↑	1.7↓	2.4	2.5↑
One piece riding suit(s)	0.0↓	0.1	0.2	0.0	0.0↓	0.2↑	0.0↓	0.1	0.1

Q39a-f How many of the following do you own?
Filter: Active riders; Weighted; Base n = 404
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*
**Note: small sample size*

Reasons for owning multiple items of protective clothing were similar to 2013. The most common reason in 2014 was for different weather conditions or day vs. night (50%). This was followed by just under one in four mentioning that they had different items for different types of riding such as off-road gear vs. on-road gear (23%). (See Table 50).

Table 50: Reasons for owning multiple items of protective gear - 2013 vs. 2014

Column %	2013	2014
For different weather conditions/seasons/day vs. night	45	50
For different riding purposes/conditions i.e. off-road vs. on-road, recreation vs. commuting	27	23
Replacement/upgrade/kept outgrown/old/damaged/out-dated/better safety gear	19	15
For other riders/passengers to use	18	13
To have a choice/have a spare/just wanted multiples	10	11
Safety reasons	-	5
Ride frequently and often need a change of riding gear/if gear is wet	5	6
Aesthetics/different style	4	9
For different bikes	3	1
Different materials	-	0
Comfort	2	1
Work gear	1	0
Other reasons	3	5

Q40 You have mentioned that you own multiple pieces of protective clothing. What are the main reasons you have more than one of the above?
Filter: Active riders with multiple items of gear; Weighted; 2013 Base n =269 2014 Base n=345
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Older riders aged 40 and over were significantly more likely to mention they had different gear for different weather conditions (57% vs. 24% for those aged 18-25 years and 39% of those aged 26-39 years).

Those who rode less often (less than 20% of the time) were more likely to have items for different riding purposes and conditions (27% vs. 13% of those who rode more often). This was also the case for recreational on-road, with 55% of them having different gear for different riding purposes and conditions (Table 51).

Table 51: Reasons for owning multiple items of protective gear by riding activity -2014

Column %	Riding vs. driving		Riding purpose (Active riders)		
	Ride less than 20% (n=209)	Ride more than 20% (n=136)	Commute (n=211)	Recreational on-road (n=272)	Recreational off-road (n=164)
For different weather conditions/seasons/day vs. night	49	53	56	55↑	37↓
For different riding purposes/conditions i.e. off-road vs. on-road, recreation vs. commuting	27↑	13↓	22	23	40↑
Replacement/upgrade/kept outgrown/old/damaged/out-dated/better safety gear	12	22	19	16	13
For other riders/passengers to use	12	15	11	15	8
To have a choice/have a spare/just wanted multiples	11	12	11	10	12
Safety reasons	7↑	0↓	3	5	5
Ride frequently and often need a change of riding gear/if gear is wet	4↓	11↑	2↓	2↓	11↑
Aesthetics/different style	8	10	9	9	4↓
For different bikes	1	1	2	1	2
Other reasons	6	4	5	6	4
Different materials	0	0	0	0	0
Comfort	2	1	0	2	0
Work gear	0	0	0	0	0

Q40 You have mentioned that you own multiple pieces of protective clothing. What are the main reasons you have more than one of the above?
Filter: Active riders with multiple items of gear; Weighted; 2014 base n = 345
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Those who did not own a complete set of gear - i.e. at least one helmet, pair of riding gloves and boots, jacket and pants (or one piece riding suit) - were asked the reasons why they did not own more gear. The most common reasons in 2014 were that they hadn't gotten around to buying it (20%). Other reasons included:

- 19% who did not think they needed it;
- 18% said it was too expensive;
- 18% mentioned it was because they only rode in the country or off-road; and
- 13% said they did not own more gear because they only rode for short trips.

Protective gear use

Respondents were asked the frequency with which they wore protective gear with results shown in Figure 56.

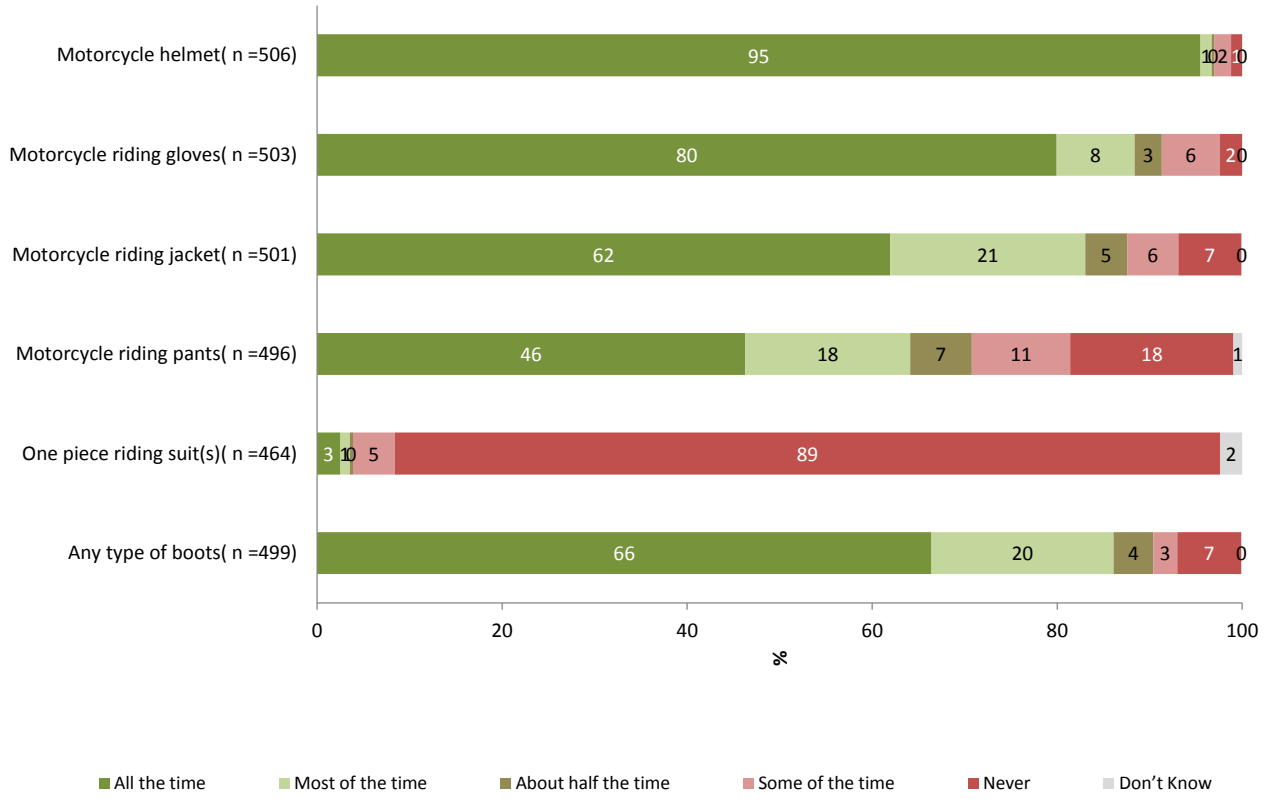
Almost all respondents (95%) said they wore a motorcycle helmet *all the time*. Eight in ten respondents (80%) reported they wore gloves *all the time*. Riding jackets were worn *all the time* by 62% of respondents and boots worn *all the time* by 66% of respondents.

Riding pants were worn less frequently with just under half (46%) respondents stating they wore them *all the time*. Nearly one in five (18%) never wore motorcycle riding pants.

A one piece riding suit was the least likely item to be worn all the time (3%) – although this is not surprising given the low level of ownership among active riders.

No changes between 2013 and 2014 were evident.

Figure 56: Usage of protective motorcycle clothing regardless of ownership - 2014

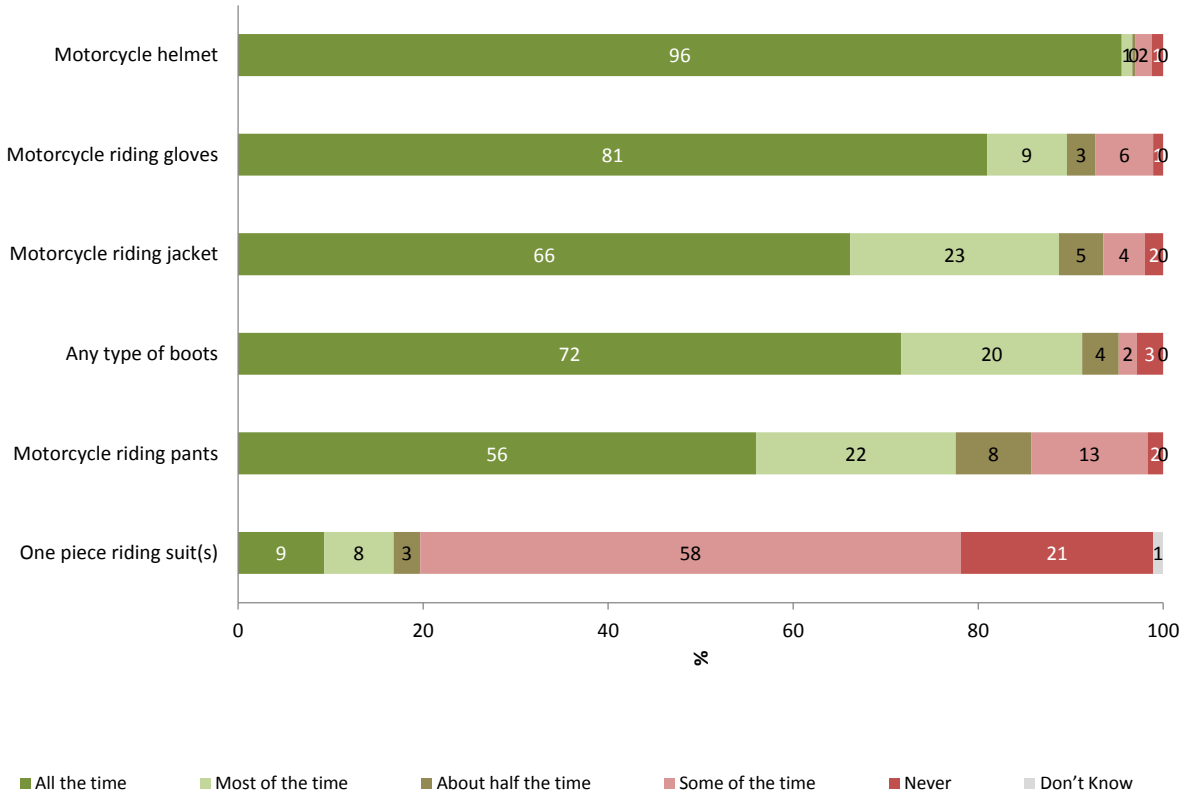


Q42a-f When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
Filter: Active riders; Weighted; Base n = 464-506

Figure 57 shows the frequency of usage among those who reported they owned the respective items.

While the proportion of those who always wore respective items of gear was slightly higher if ownership was taken into account, only 66% of those who owned a jacket wore them all the time, 72% of respondents who any boots wore then all the time and around half (56%) who owned motorcycle pants wore them all the time.

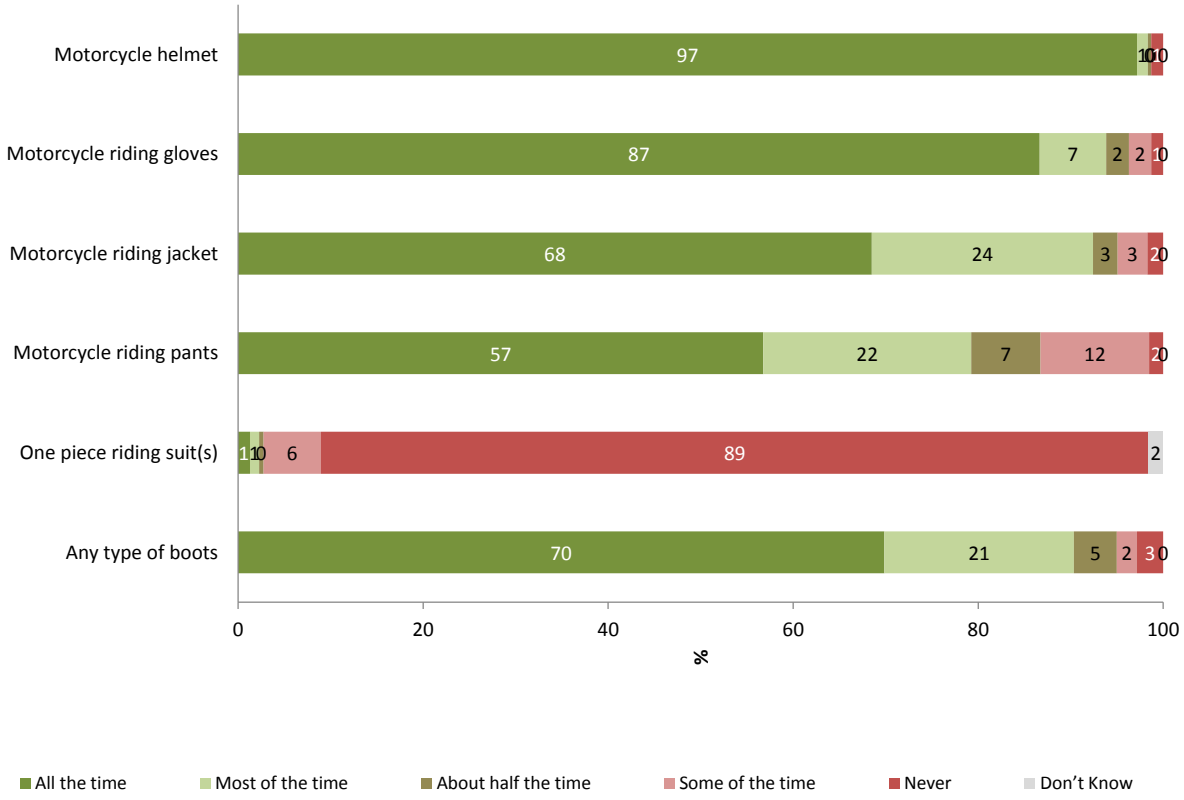
Figure 57: Usage of protective motorcycle clothing where owned by respondent – 2014



Q42a-f When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
Filtered: Active riders; Weighted; Base n = from 454

Figure 58 shows the usage of protective gear among those who owned a complete set of gear (i.e. helmet, gloves, boots, jacket and pants (or a one piece suit). However, riding pants were still only worn on every ride by almost six in ten (57%) respondents who had a complete set of protective gear.

Figure 58: Usage of protective motorcycle clothing where owned by respondent (among those who owned a complete set of gear) - 2014



Q42a-f When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
Filter: Own complete set of gear; Weighted; Base n = 317 to 346
Note: Excludes those who own none of the items

Looking at the number of items worn by active riders (including helmets), two thirds (64%) of respondents said they wore three or more items all the time. Eight six percent (86%) of respondents reported they wore three or more items (including a helmet) most or all the time.

Table 52: Number of items worn when riding - 2014

Number of items of protective clothing	% worn all the time
0	1
1	11
2	24
3	27
4	36
5	1
Number of items of protective clothing	**% worn all or most of the time**
0	0
1	3
2	11
3	21
4	50
5	14

Q42a-f When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?
Filter: Own complete set of gear; Weighted; Base n = 462

In 2014, respondents were asked specifically about the type of footwear they wore when riding a motorcycle. In total, two in three respondents said they wore either riding boots or other boots *all the time* (68%). Thirty seven percent (37%) reported they wore specific motorcycle riding boots *all the time*. Fourteen percent (14%) reported they wore other boots every time they rode.

When asked whether they agreed or disagreed with the statement “wearing boots that cover my ankles will protect my feet better than other shoes would”, the vast majority of respondents (94%) agreed with the statement (with 80% strongly agreeing and 13% agreeing somewhat). Females were significantly more likely to agree with this statement (99% vs. 93% of males).

In 2014, 25% of active riders reported that they always wore a complete set of gear - i.e. that they always wore either both jacket and pants (or a one piece suit) with a helmet, gloves, and boots when they rode.

Those who did not wear the full kit of gear *all the time* were asked why this was the case. Overall, it depended on the riding style and type of trip (mentioned by 47%), followed by weather conditions (25%). For other commonly mentioned reasons, see Table 57 below.

Table 53: Main reasons for not wearing protective gear every time - 2014

	2014 %
Depends on the destination / riding style / length of trip / speed	47
Depends on the weather /only wear for cold / rainy weather / humidity and summer temperatures	25
I do wear (item of protective clothing) a jacket, boots, gloves, etc.	17
I do always wear the gear that I own / I don't own all the protective clothing listed	14
Inconvenient to change clothes / need to wear other clothing for work / need a changing area / hassle to carry extra clothing	11
Clothing is cumbersome / restrictive / impractical / unwieldy / get in the way / other clothing is more comfortable	11
Too dear / expensive / difficult to find in my size	5
Convenience / easier / too much of a hassle / I`m lazy	4
Other mentions	7
None / Nothing	1
Don't know	1

Q43 You have said you don't wear all your protective motorcycle clothing every time you ride… What are the main reasons for this?
Filtered: Active riders; those who did not wear full kit all the time; Weighted; Base 2014 n = 300

Reasons among female and male riders were similar in their main reasons for not wearing protective gear every time (See Table 54).

Table 54: Main reasons for not wearing protective gear every time – by gender – 2014

	Male (n = 245)	Female (n = 54)
Depends on the destination / riding style / length of trip / speed	48	38
Depends on the weather /only wear for cold / rainy weather / humidity and summer temperatures	24	40
I do wear (item of protective clothing) a jacket, boots, gloves, etc.	17	16
I do always wear the gear that I own / I don't own all the protective clothing listed	15	9
Inconvenient to change clothes / need to wear other clothing for work / need a changing area / hassle to carry extra clothing	11	15
Clothing is cumbersome / restrictive / impractical / unwieldy / get in the way / other clothing is more comfortable	9	23
Too dear / expensive / difficult to find in my size	5	10
Convenience / easier / too much of a hassle / I`m lazy	5	1
None / Nothing	1	0
Don't know	1	1
Other mentions	7	9

Q43 You have said you don't wear all your protective motorcycle clothing every time you ride… What are the main reasons for this?
Filtered: those who did not wear full kit all the time; Weighted; Base 2014 n = 299
↓↑ *indicates statistically significant difference between genders*

Protective gear purchase intentions

Respondents were asked what, if any, motorcycle clothing they intended to buy in the next six months. Just under two-thirds intended to purchase something in the near future (63%). The items most likely to be bought in the near future were pants (19%), boots and helmet (both 15%). Results were unchanged compared to 2013.

Table 55: Motorcycle clothing purchase intentions for next 6 months – 2013 vs. 2014

	2013 %	2014 %
Don't intend to buy any	45	37
Helmet	18	15
Gloves	18	12
Boots	14	15
Jacket	15	11
Pants	17	19
Body Armour	6	5
LEATT Neck Brace	5	3
Other	1	1
None of the above	17	19

Q45 What, if any, motorcycle clothing do you intend to buy in the next 6 months?
Filter: Active riders; Weighted; 2013 Base n = 405; 2014 Base n = 511

In 2014, intentions to purchase gear were highest among riders aged 18-25 years (57%) and lowest among those aged 40+ (41%). This year, young riders (18-25 years) were significantly more likely to intend to buy jackets than older riders (24% compared to 12% of those aged 26-39 year olds and 9% of those aged 40 years and over).

Table 56: Motorcycle clothing purchase intentions for next 6 months by age - 2014

Column %	Age		
	18-25 (n=185)	26-39 (n=137)	40+ (n=188)
Don't intend to buy any	27↓	30	41↑
Subtotal – Intend to buy at least 1 item	*57↑*	*51*	*41↓*
- Helmet	20	20	13
- Gloves	18	15	9
- Pants	23	20	18
- Jacket	24↑	12	9
- Boots	16	18	14
- Body Armour	6	10	3
- LEATT Neck Brace	6	5	2
- Other	4↑	2	0↓
None of the above	16	19	19

Q45 What, if any, motorcycle clothing do you intend to buy in the next 6 months?
Filter: Active riders; Weighted; Base n = 510
↓↑ *indicates statistically significant difference compared to those **not** in that category*

Respondents who *already* owned a complete set of gear were statistically no more or less likely to report they intended to purchase some gear in the future than those who did not (40% compared to 29%), however, those who did not own a complete set of gear were more likely to not tick any of the items above (27%).

Table 57: Motorcycle clothing purchase intentions for next 6 months by whether riders currently own a complete set of protective gear - 2014

Column %	Own complete set of gear (n=347)	Do not own complete set of gear (n=164)
Don't intend to buy any	40	29
Subtotal - At least one item	*45*	*44*
Helmet	15	15
Gloves	12	12
Boots	14	17
Jacket	9	15
Pants	16	26
Body Armour	5	4
LEATT Neck Brace	4↑	1↓
Other verbatim	0	0
None of the above	15↓	27↑

Q45 What, if any, motorcycle clothing do you intend to buy in the next 6 months?
Filter: Active riders; Weighted; Base n = 511
↓↑ *indicates statistically significant difference compared to those* ***not*** *in that category*

When looking to purchase motorcycle clothing, around 40% reported they looked for the CE (European Union) standard or the Snell logo, significantly down from 2013 (47%). However, a substantial proportion of active riders were not aware of the CE standard or Snell (34% - 2013, similar to 31% last year). A lack of awareness of the European Union standard was much more prevalent among female riders (49% did not know what it was) compared to males (32%).

Body armour

As shown in Table 58, two thirds of active riders reported they owned at least one piece of body armour (64%, similar to 2013 – 66%). The most common pieces of armour owned were inserts for riding jackets (45%); followed by inserts for riding pants (31%) and back protectors (separate piece) (26%), all consistent with 2013. In 2014, riders were significantly less likely to say they owned a chest protector (separate piece) (11%) and a LEATT Neck brace (4%) compared to 2013.

Table 58: Body armour owned by year - 2013 vs. 2014

	2013 %	2014 %
Subtotal – at least one item	*66*	*64*
Back protector (separate piece)	32	26
Chest protector (separate piece)	21↑	11↓
Inserts for riding jackets	43	45
Inserts for riding pants	36	31
Body armour kit	15	23
LEATT Neck brace	10↑	4↓
Other body armour	21↑	7↓
None of the above	35	36

Q44. Do you own any of the following pieces of body armour?
Filter: Active riders; Weighted; 2014; base n = 511
↓↑ *indicates statistically significant difference compared to those **not** in that category*

The items of body armour that were more likely to be owned by off-road bike riders included chest protectors (21%), body armour kits (52%) and LEATT neck braces (13%). Those who mainly rode scooters were most likely to own inserts for riding jackets (71%) and a back protector (47%) (See Table 59).

Table 59: Body armour owned by main bike ridden

Column %	Type of bike (main bike)		
	Off road bike/trail bike (n=125)	Road bike (n=281)	Scooter (n=38)*
Inserts for riding jackets	31↓	52	71↑
Inserts for riding pants	33	36	16
Back protector (separate piece)	28	26	47↑
Chest protector (separate piece)	21↑	9	0
Body armour kit	52↑	14↓	0↓
LEATT Neck brace	13↑	2↓	0
Other body armour	72	63	73
None of the above	28	37	27

Q44. Do you own any of the following pieces of body armour?
Filter: Active riders who have at least one bike at home; Weighted; 2014 Base n = 444
↓↑ *indicates statistically significant difference compared to those **not** in that category*
**Note: Small sample size*

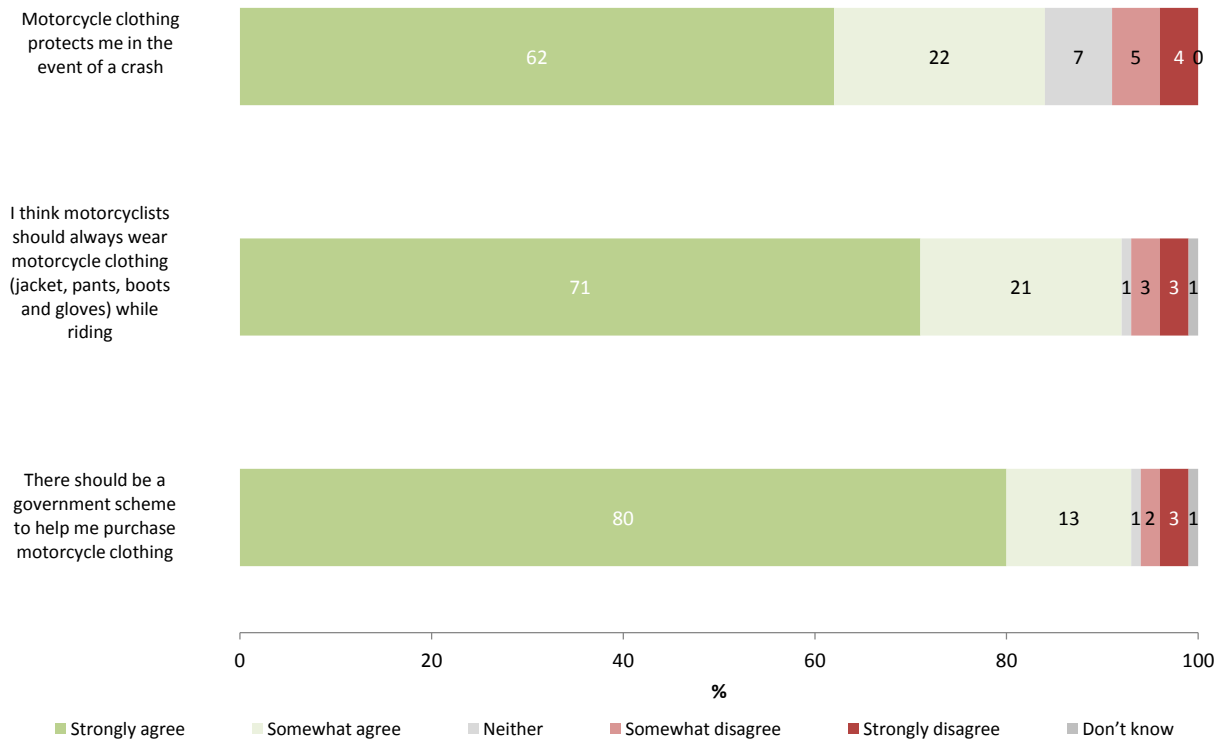
9.2 Attitude statements about motorcycle safety clothing

A series of statements regarding motorcycle clothing was put to all respondents. The level of agreement/disagreement with these statements is shown in Figure 59.

There was a strong belief that motorcycle clothing did provide protection in the event of a crash, with nearly two-thirds (62%) of all respondents *strongly agreeing* with this statement.

Just under three quarters (71%) of all respondents strongly agreed that 'motorcyclists should always wear motorcycle clothing (jacket, pants, boots and gloves) while riding'.

Figure 59: Agreement/disagreement with statements regarding motorcycle safety clothing



Q55 To what extent do you agree or disagree with the following statements...
Filter: Excluding never ridden motorcycle; Total sample; Weighted; Base n = 569 to 574

There was a significant difference in agreement between those who wore their protective gear (jacket, pants, gloves, boots and helmet) all the time and those who did not in relation to the statement *I think motorcyclists should always wear motorcycle clothing (jacket, pants, boots and gloves) while riding*. Nine in ten respondents (90%) of active riders wore a full set of protective gear all the time strongly agreed with the statement compared to 50% who strongly agreed among those who did not wear their full kit all the time.

10. Motorcycle crash history

All respondents were asked whether they had *ever* experienced a crash. In comparing the results from 2012 to 2014, the proportions of riders who had experienced a crash were similar (47% in 2014 vs. 46% in 2013 vs. 54% in 2012). The location, and to whom the fault was attributed were also broadly similar, as was the proportion of respondents who received compensation as a result of this crash.

Half of those who had experienced a crash reported they required medical treatment as a result (50%). Only a minority (8%) reported that their most recent crash was in the last 12 months. Half of all those who had experienced a crash said it had happened more than 11 years ago (52%). With riders being skewed towards the older age groups, this suggests that crashes requiring medical treatment were more likely to happen in the earlier years of their riding careers.

Off road bikes made up one in three of the crashes that required medical attention (32%) – slightly but not significantly higher than the proportion who said they mainly rode an off-road bike (25%). Just over half of the crashes had occurred on an on-road bike (56%) with a higher representation of sports tourer bikes among those who had a crash requiring medical attention compared to 2013 (16% vs. 5%).

One in four of those who had crashed in an on-road environment reported that they had been at fault (25%) with one in three saying that another party was at fault (35%) and an additional 16% who said that fault could be attributed to the two parties. One in ten (11%) reported that no other vehicles were involved in the crash.

A third (30%) of respondents who had ever experienced a crash received compensation or income support as a result of injuries they had received due to a motorcycle crash – most (75%) of whom received this from the TAC.

10.1 Crash history

All respondents were asked whether they had *ever* experienced a crash while riding a motorcycle (excluding dropping their bike while stationary or crashing while taking part in motorcycle sport). Just under half (47%) of respondents in 2014 had done so - similar to 2013 (46%) (See Figure 60). In 2014, respondents were asked how many times they had crashed in the last 12 months. Of those that had crashed, over half (58%) had crashed only once. Just over one in four (28%) had crashed 2-4 times and 14% had crashed 5 or more times.

Figure 60: Motorcycle crash history - 2012-2014

Q56 Have you ever had a crash while riding a motorcycle?
Total sample; Weighted; 2012 base n = 545; 2013 base n = 694; 2014 base n = 778
Note: excludes prefer not to say and never ridden

Younger riders were significantly less likely compared to those aged 26 or older to have experienced a crash (37% vs. 43% of 26-39 year-olds and 59% of those aged 40+). There were no significant differences between gender and location in 2014.

Table 60: Motorcycle crash history by rider characteristics - 2014

	% Yes
Gender	
Male	48
Female	38
Age	
18-25	37↓
26-39	43
40+	59
Location	
Melbourne	59
Balance of Victoria	43

Q56 Have you ever had a crash while riding a motorcycle?
Total sample; Weighted; Base n= 774 to 778
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Note: excludes prefer not to say and never ridden

10.2 Crashes requiring medical treatment

Half of those who had experienced a crash said they had needed medical attention as a result of the incident (50% vs. 49% in 2013).

As in 2013, with riders in the population skewed towards older age groups, it is not surprising that the majority of those who had needed medical treatment for their most recent crash reported this had been 11 years ago or more (52% vs. 56% in 2013).

In 2014, very few riders who had needed medical treatment for their most recent crash reported this had occurred in the last 12 months (8%). Just over one-in-five riders who had needed medical treatment for their most recent crash said this had been between 1-5 years ago (19%) (See Table 61).

Table 61: Details of most recent crash requiring medical treatment – time of crash 2012 vs. 2013

	% 2013	% 2014
Required medical treatment as a result of crash	49	50

Time of crash	% 2013	% 2014
Within the last 12 months	6	8
1 to 5 years ago	20	19
6 to 10 years ago	17	19
11 or more years ago	56	52
Can't say	1	3

Q57 Have you required medical treatment as a result of any motorcycle accident?
Filter: Ever experienced crash; Weighted 2013 base: n=116; 2014 base n=139
Q58 When did the crash occur?
Filter: Excluding never ridden a motorcycle; Weighted; 2012 base n=108; 2013 base n=115
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Filter: Required medical treatment

Although sample sizes were small, more than half (61%) of 18-25 year olds reported having a crash requiring medical treatment in the last 1-5 years. Six in ten of riders aged 40+ had crashed more than 11 years ago (61%) suggesting that crashes tended to occur in the early stages of a rider's motorcycling experience.

Table 62: Details of most recent crash requiring medical treatment – time of crash by age

Column %	Age		
	18-25 (n=23)*	26-39 (n=39)*	40+ (n=76)
Within the last 12 months	39↑	14	4↓
1 to 5 years ago	61↑	31	13↓
6 to 10 years ago	0	24	19
11 or more years ago	0↓	31↓	61↑
Can't say	0	0	4

Q58 When did the crash occur?
Filter: Excluding never ridden a motorcycle; Weighted; base n = 139
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Filter: Required medical treatment

As shown in Table 63, respondents were most likely to say they went to the Emergency Department for medical treatment (58%). Over a third said they had been admitted to hospital in their most recent incident (39%), while just under a quarter reported they had gone to their local doctor for treatment (23%). There was an increase in those who reported being treated by an ambulance at the scene (32% vs. 12% in 2013).

Table 63: Details of most recent crash requiring medical treatment - 2013 vs. 2014

Experienced crash:	% 2013	% 2014
Required medical treatment as a result of crash	49	50

Type of treatment	% 2013	% 2014
Went to Emergency	47	58
Admitted to hospital (in a ward)	32	39
Went to my doctor	20	23
Saw a physiotherapist/chiropractor or similar	14	17
Treated by ambulance at the scene	12↓	32↑
Admitted to a rehabilitation facility	2	8
Radiologist/x-ray	-	-
Other verbatim	10↑	1↓
Can't say / don't recall	1	1

Q56 Have you ever had a crash while riding a motorcycle?
Filter: Excluding never ridden a motorcycle; Weighted;
Q57 Have you required medical treatment as a result of any motorcycle accident?
Q62 What sort of treatment did you require? 2012 base n=112; 2013 base n=136
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
Filter: Required medical treatment;

10.3 Circumstances of most recent crash

In 2014, 32% of those who crashed and required medical treatment had been riding an off-road bike. More than half (56%) had been riding a road bike. Compared to 2013, there was a significant increase in those who were riding a sports tourer bike (16% vs. 5% in 2013).

Scooters were ridden by only 6% those who had experienced a crash requiring medical attention.

Table 64: Details of most recent crash requiring medical treatment 2013 vs. 2014

Type of bike ridden during crash	% 2013	% 2014
Off-road bike/trail bike	39	32
Subtotal – Road bike (excluding scooters and other types of bikes)	50	56
- *Sports bike*	*22*	*26*
- *Sports tourer*	5↓	16↑
- *Dual sport*	*0*	*2*
- *Tourer/cruiser*	*20*	*11*
- *Other road bike*	*2*	*1*
Scooter	4	6
Other type of bike	7	5
Can't recall	1	0

Q60 What type of bike were you riding?
Filter: Required medical treatment; Weighted; 2013 base n =; 2014 base n=141
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

Respondents whose most recent crash happened on a road bike were less likely to have said it occurred 1 to 5 years ago (10%). Those who crashed on a scooter were less likely to have said that it occurred 11 or more years ago (20%) (Table 65).

Table 65: Details of most recent crash requiring medical treatment – Time since crash by type of bike - 2014

Column %	Off road bike/trail bike (n=52)	Road bike (n=71)	Scooter (n=11)*	Total (n=138)
Within the last 12 months	7	8	19	8
1 to 5 years ago	30	10↓	61	19
6 to 10 years ago	21	23	0	19
11 or more years ago	41	56	20↓	51
Can't say	2	4	0	3

Q58 When did the crash occur?
Q60 What type of bike were you riding?
Filter: Required medical treatment and crash occurred on-road/sealed road surface; Weighted; 2014 base n=138
"Other type of bike" not shown in table above
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*
** Small sample size*

Sealed roads in built-up areas were the most common location in both years (45% in 2014 and 51% in 2013). Almost one in four (23%) of incidents requiring medical treatment occurred on sealed roads in rural areas. Figures for both 2013 and 2014 are similar. (See Table 64).

Table 66: Details of most recent crash requiring medical treatment – Location of crash - 2013 vs. 2014

Location of crash	2013	2014
Sealed road, built-up area	51	45
Sealed-road, rural area	12	23
Unsealed road	8	6
Track in state park /forest/plantation	15	13
Private property	6	6
Public land in residential areas (e.g. park, reserve, bicycle track)	1	1
On a race track (on a track day or as part of a riding course)	5	4
Other	3	1

Q61. Where did the crash occur?
Filter: Required medical treatment; Weighted; 2013 base n = 116; 2014 base n=142
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

In 2014, for those whose most recent crash requiring medical treatment occurred while on an off-road bike, the most common location was on a track in state park/forest/plantation (40%) followed by private property (18%). Two thirds (67%) of those who were on a road bike during their most recent crash had done so on a sealed road in a built up area (See Table 67).

Table 67: Details of most recent crash requiring medical treatment – Location of crash by type of bike - 2014

Column %	Off road bike/trail bike (n=102)	Road bike (n=127)	Scooter (n=17)*	Total (n=256)
Sealed road, built-up area	12↓	67↑	78↑	48
Sealed-road, rural area	5↓	27↑	16	18
Unsealed road	17↑	2↓	6	7
Track in state park /forest/plantation	40↑	0↓	0	14
Private property	18↑	0↓	0	9
Public land in residential areas (e.g. park, reserve, bicycle track)	0	2	0	1
On a race track (on a track day or as part of a riding course)	8	1↓	0	4
Other	1	2	0	1

Q61 Where did the crash occur?
Q60 What type of bike were you riding?
Filter: Required medical treatment; Weighted; 2014 base n=256
"Other type of bike" not shown in table above
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*
** Small sample size*

Table 68 shows the details of who else was involved in the crash. In 2014, 35% believed another party was at fault in their most recent crash requiring medical treatment. One in four (25%) respondents reported they themselves were at fault. Fewer respondents reported that no one was at fault (2% in 2014 compared to 10% in 2013).

Table 68: Details of most recent crash on-road requiring medical treatment – perceived fault – 2013 vs. 2014

Perceived fault	% 2013	% 2014
I was at fault	17	25
Another party was at fault	48	35
Both myself and another party were at fault	6	16
No-one was at fault	10↑	2↓
No other vehicles involved	7	11
Other	11	10
Can't say	1	0

Q59 Who do you believe was at fault?
Filter: Required medical treatment and crashed on-road/sealed surface; Weighted; 2013 base n = 74, 2014 base n=101.
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*

In 2014, those who were on off-road/trail bikes were most likely to say that no other vehicles were involved (36%) and those on a scooter were most likely to say that another party was at fault (71%) although the sample sizes were small in both 2013 and 2014.

Table 69: Details of most recent crash requiring medical treatment – Fault by type of bike - 2014

Column %	Off road bike/trail bike (n=16)*	Road bike (n=71)	Scooter (n=10)*	Total (n=100)
I was at fault	37	26	11	26
Another party was at fault	27	34	71↑	35
Both myself and another party were at fault	0	16	10	16
No-one was at fault	0	3	0	2
No other vehicles involved	36↑	8	0	12
Other	0	13	9	10
Can't say	0	0	0	0

Q59 Who do you believe was at fault?
Q60 What type of bike were you riding?
Filter: Required medical treatment and crash occurred on-road/un-sealed road surface; Weighted; 2014 base n=100
"Other type of bike" not shown in table above
*↓↑ indicates statistically significant difference compared to respondents **not** in that category*
** Small sample size*

In 2014, those who experienced a crash on a sealed road in a built-up area were most likely to say another party was at fault (52%). While sample sizes were small and results should be treated as indicative, those who incurred a crash requiring medical attention on unsealed road were most likely to say they were at fault (64%).

Table 70: Details of most recent crash on-road requiring medical treatment – Perceived fault by crash location (on-road only) - 2014

Column %	Sealed road, built-up area (n=59)	Sealed-road, rural area (n=31)*	Unsealed road (n=11)*	Total (n=101)
Another party was at fault	52↑	13↓	0	35
I was at fault	20	25	64↑	25
No-one was at fault	1	3	8	2
No other vehicles involved	9	12	28	11
Both myself and another party were at fault	12	25	0	16
Other	6	22	0	10
Can't say	0	0	0	0

Q59 Who do you believe was at fault?
Q61 Where did the crash occur?
Filter: Required medical treatment and crashed on-road/sealed surface; Weighted; base n=101.
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*
**Note: small sample sizes*

In 2014, those whose crash occurred off-road were asked what they believed caused the crash. Among the 31 respondents, the most common response was rider error (42%), followed by road/trail conditions (38%) and terrain (24%).

Table 71: Details of most recent crash off-road requiring medical treatment – Perceived cause (off -road only) - 2014

Column %	2013	2014
Rider error	30	42
Lapse in concentration	18	9
Road/trail conditions	17	38
Trees (e.g. fallen logs, overhanging branches)	13	9
Doing tricks	8	2
Terrain	8	24
Mechanical failure of the motorcycle	7	3
Weather conditions	4	8
Other	3	8

Q59a What caused your crash?
Q61 Where did the crash occur?
Filter: Required medical treatment and crashed off-road; Weighted; 2014 base n=44; Weighted 2013 base n=42
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

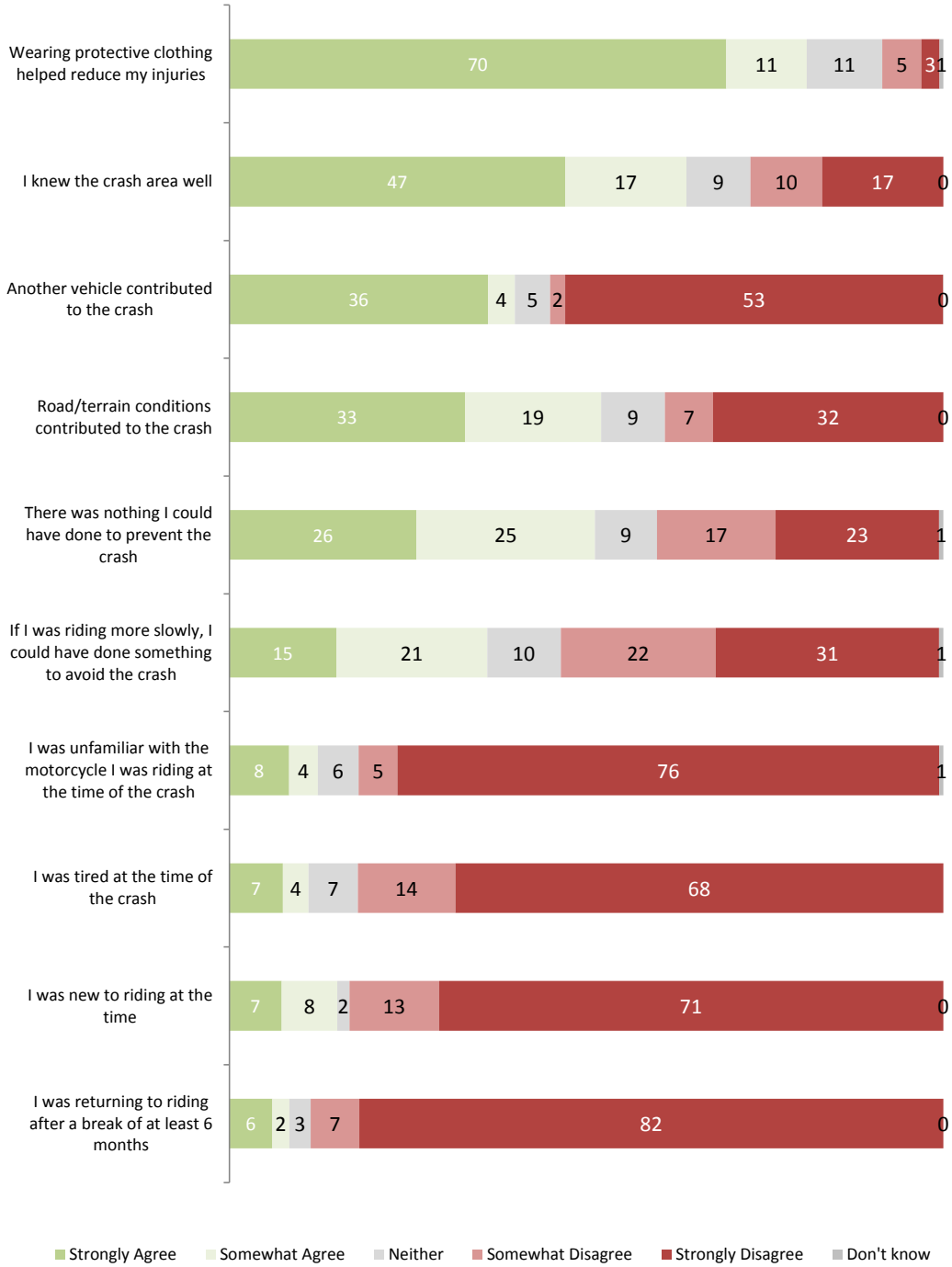
Respondents who had crashed and had required medical attention were asked their opinion on a range of statements about their views on the circumstances their crash.

There was strong agreement with the statement *"Wearing protective clothing helped reduce my injuries"*, with 70% of respondents strongly agreeing with the statement.

There was an overall disagreement with statements related to their unfamiliarity with the motorcycle, tiredness, returning to riding after a break and being new to riding (see Table 61).

Around a third (36%) agreed strongly that another vehicle contributed to the crash.

Figure 61: Agreement/disagreement with statements regarding their most recent crash



Q59B. Thinking about your most recent crash that required medical treatment, to what extent do you agree or disagree with the following statements?
Filter: Crashed and needed medical treatment; Weighted; Base n = 128 to 131

Some demographic differences included:

- Females more likely to report they agreed that there was nothing they could do to avoid the crash (78% vs. 49%); and
- Those living in regional Victoria were more likely to agree that if they were riding more slowly, they could have done something to avoid the crash (50% vs. 28% of those who lived in Melbourne).

Compensation

Three in ten riders (30%) said they received compensation for injuries from a motorcycle crash. Among the 35 respondents who had received compensation or income support, the vast majority said they had received this from the TAC (75%). The remainder reported sources such as personal insurance organisations (24%), property/vehicle insurance organisations (8%) or through Centrelink (e.g. Disability Support Pension or Sickness Allowance) (2%) (See Table 72).

Table 72: Details of compensation received

Source of compensation	% 2013	% 2014
TAC	76	75
Property/vehicle insurance organisation	14	8
Centrelink (e.g. Disability Support Pension or Sickness Allowance)	17↑	2↓
WorkSafe/WorkCover/Comcare	4	2
Personal insurance organisation (e.g. health, income protection)	0↓	24↑
Other	11	19
Prefer not to say	0	0

Q64 From whom did you receive this compensation?
Filter: Ever crashed AND ever received compensation as a result of injuries from a motorcycle crash; Weighted; 2013 base n =30; 2014 base n=35
↓↑ *indicates statistically significant difference compared to respondents **not** in that category*

11. Respondent suggestions to improve rider safety

Respondents were asked their opinion about the statement “motorcyclists can only be safe on the road if both riders and drivers share responsibility for their safety”. A large majority of respondents (93%) agreed with this statement, with 81% strongly agreeing and 12% somewhat agreeing. A small proportion, 4%, disagreed with the statement.

This overwhelming opinion is reflected in the types of answers provided when respondents were asked unprompted if they had any suggestions about what the TAC could do to improve rider safety. These have been listed in Table 73.

The most common theme related to improving the awareness of road users or providing education by providing training on motorcycle safety and road sharing (27%). Related to this were suggestions around developing awareness campaigns or continuing existing advertising campaigns relating to motorcycle safety (12%). Maintaining the roads, fixing defects, removing potholes and cleaning up after road works was mentioned by one in ten respondents.

Table 73: Suggestions to the TAC about what they can do to improve rider safety - 2014

	%
Improve road user awareness /education (include training in motorcycle and push bike safety/sharing the road etc.)	27
Awareness campaigns / continue the advertising	12
Maintain the roads / fix defects / remove pot holes / clean up after road works	10
Comprehensive learner rider courses / more supervised training	7
Increase rider awareness/responsibilities on roads e.g. abide by road rules/consideration of other road users etc.	7
Make the wearing of protective clothing mandatory	7
Legalise traffic splitting and filtering	6
Make licence harder to obtain - after 12 months / after obtaining full car licence…	5
More dedicated rider training/awareness e.g. refresher courses/advanced driving/safety issues etc.	5
Education / provide driver and rider training in schools	4
Make the wearing of high visibility vests and jackets mandatory	4
Restricted range of bikes / limit usage of powerful bikes by less experienced riders	3
Remove wire rope crash barriers / wire barriers can kill	3
Increase penalties for car drivers who cause smashes / speed / text / don’t indicate…	3
Refresher courses / compulsory re-sitting of tests for foreign licence holders	3
Other mentions	11
None / it’s up to the individual / riders are responsible for their own actions	10

Q72 Would you like to make any suggestions to the TAC about what they can do to improve rider safety
Total sample; Weighted; Base n = 784

Respondents were also asked how many motorcyclists they thought had died on the roads in the previous year. Forty-one riders and pillions died on Victorian roads in 2013.[1] Thirty nine percent (39%) thought between 26-50 motorcyclists died on the roads last year (see Table 74) with one in five greatly underestimating motorcycle fatalities thinking that there were between 0-25 deaths per year.

Table 74: Perception of motorcycle deaths - 2014

	%
0	12
1-25	8
26-40	20
41-50	19
51-100	23
101-150	7
151-200	5
200+	7

Q64B. How many motorcyclists do you think died on Victoria's roads last year?
Total sample; Weighted; Base n =583

When asked what they thought were the main causes of motorcycle deaths on the road, the most common response was drivers not paying attention to riders, or driver errors (48%), followed by speed (drivers and riders) (43%) and poor riding skills or inexperience (27%). Other mentions are highlighted in Table 75 below).

[1] http://www.tac.vic.gov.au/road-safety/statistics/summaries/motorcycle-crash-data

Table 75: Main causes of motorcycle deaths on the road - 2014

	%
Drivers lack of awareness/ cars not seeing motorcycles /Driver errors/careless driving/ not looking out for others	48
Speed/speeding	43
Bad riders/poor riding skills/inexperienced riders	27
Hooning/recklessness/risk taking/danger etc.	16
Cars/other drivers/car drivers/motorists/road users (no further information)	15
Road conditions/bad roads/poor road surface	10
Riders not paying attention/lack of concentration/tired/careless	7
Alcohol/drugs (drivers and/or riders)	9
Driver behaviour/bad drivers/inexperienced drivers/uneducated drivers	6
Fatigue/tiredness/drowsiness	5
Lack of protection for a rider/not wearing the right protective gear	5
Weather conditions/environmental factors	4
Collisions with cars/accidents with vehicles	4
Not riding to the conditions/traffic conditions	3
Drivers speeding/dangerous driving/hoons/drivers not following the road rules	3
Rider error/motorcyclists fault	3
Crashing/accidents/collisions with objects	2
Lane splitting	2
Riding overpowered bikes	2
Stupidity/idiots/lack of intelligence etc.	2
Blind spots	1
Other mentions	6
Don’t know	2

Q72 Would you like to make any suggestions to the TAC about what they can do to improve rider safety
Total sample; Weighted; Base n = 568

Appendices

Demographics

Table 76: Gender

	Unweighted %	Weighted %
Male	81%	88%
Female	19%	12%
Total	100%	100%

Q2 Gender
Filter: 2014 ONLY; base n = 782

Table 77: Age

	Unweighted %	Weighted %
18-25 years	27%	6%
26-39 years	29%	26%
40+ years	44%	68%
Total	100%	100%

Q1 Age (Categories)
Filter: 2014 ONLY; base n = 780

Table 78: Location (based on sample information)

	Unweighted %	Weighted %
Balance of Victoria	46%	38%
Melbourne	54%	62%
Total	100%	100%

Sample variable - location
Filter: 2014 ONLY; base n = 784

Table 79: Socio-Economic Index for Area Quintiles (based on sample information)

	Unweighted %	Weighted %
Quintile 1 (Most *dis*advantaged)	14%	13%
Quintile 2	16%	14%
Quintile 3	19%	16%
Quintile 4	28%	31%
Quintile 5 (Least *dis*advantaged)	23%	26%
Not classified	0%	0%
Total	100%	100%

Sample variable – SEIFA Quintile
Filter: 2014 ONLY; base n = 776

Table 80: Motorcycle licence

	Unweighted %	Weighted %
Yes - Learner	10%	4%
Yes - Probationary	11%	3%
Yes - Full	76%	91%
No - no motorcycle/motor-scooter licence	0%	0%
No - Never held a motorcycle/motor-scooter licence	1%	1%
No – No longer hold a motorcycle/motor-scooter licence	2%	2%
Subtotal - No licence	3%	2%
Total	100%	100%

Q4 Do you have a motorcycle licence?
Filter: 2014 ONLY; base n = 781

Table 81: Main paid occupation

	Unweighted %	Weighted %
Managers and administrators	13	14
Professionals and associate professionals	22	25
Technicians and trade workers	27	25
Clerical and administrative workers	4	5
Community and personal service workers	6	6
Sales workers	6	5
Machinery operators and drivers	8	9
Labourers and related workers	7	6
Other	5	6
Total	100%	100%

Q65 How would you describe your main paid occupation?
Filter: 2014 ONLY; Employed; base n = 684

Table 82: Interest in taking part in future TAC research

	Unweighted %	Weighted %
No, I would not be interested	48%	49%
Yes, I would be interested	52%	51%
Total	100%	100%

Q78. Would you be interested in participating in other TAC research into motorcycle safety or other road safety related research?
Filter: 2014 ONLY; base n = 781

Questionnaire

The online questionnaire has been included as an appendix of the report.

The hardcopy and/or the telephone survey differ slightly in the wording of instructions and have been included as appendices to a separate technical report.

TAC

Motorcycle Monitor 2014
Online Questionnaire

VERSION 4: 15/05/2014

(Based on 2013 Version: 7 11/06/2013 - Online version)

Job #: 13-098134-01

BACKGROUND TO PROJECT

The TAC is a statutory authority established under the Transport Accident Act 1986 (Vic) (Act) responsible for managing a compensation scheme which pays compensation to people who are injured as a result of transport accidents (TAC Clients).

Compensation payable by the TAC to TAC Clients includes medical services, rehabilitation services and disability services.

The TAC's responsibilities under the Act include:

- promoting the prevention of transport accidents and safety in the use of transport; and
- designing and promoting, so far as possible, programs designed to secure the early and effective medical and vocational rehabilitation of persons injured as a result of a transport accident

This survey will be conducted to gather detailed information about motorcycle riders and their attitudes toward road safety; and their behaviour while riding their motorcycles.

SAMPLING & QUOTAS

A random selection of 2350 Victorian motorcycle licence holders and/or those with a registered motorcycle in their name stratified by age, gender, region and motorcycle status will have received an invitation to complete an online survey via mail, which also contains the option to compete the survey via telephone should they prefer. A hardcopy version of the questionnaire will be posted as part of the letter reminder. All those who have not completed the survey will also receive a follow-up telephone call reminder.

There are no quotas for this survey. Anyone who wishes to complete the survey will have the opportunity to do so.

NOTE: Basis for the 2014 questionnaire is the 2013 motorcycle survey

BLUE = Computer programming instructions

GREY = Changes and additions

QUESTION SECTIONS

INTRODUCTION

SECTION A: **DEMOGRAPHICS**

SECTION B: **HISTORY OF MOTORCYCLE USE**

SECTION C: **LEARNING TO RIDE**

SECTION D: **RIDING HISTORY**

SECTION E: **MOTORCYCLES IN YOUR HOUSEHOLD**

SECTION F: **YOUR RECENT MOTORCYCLING ACTIVITY**

SECTION G: **PROTECTIVE MOTORCYCLE CLOTHING**

SECTION H: **ATTITUDES AND BEHAVIOURS**

SECTION G: **CRASH HISTORY**

SECTION A: **DEMOGRAPHICS (PART 2)**

---------- [NEW SCREEN] ----------

INTRODUCTION

Welcome to the TAC Motorcycle Survey 2014

Thank you for agreeing to participate in this important survey.

The Transport Accident Commission (the TAC) has commissioned the Ipsos Social Research Institute as an independent research organisation to conduct this survey on their behalf. This survey will provide you the opportunity to have a say about road safety issues that are important to motorcyclists whether you ride regularly, occasionally or used to ride.

This survey will take approximately 15 minutes to complete.

At the end of the survey, you will have an opportunity to enter a draw for one of five cash prizes of $250.

Surveys completed online by 24 June 2014 will also be entered into an ~~additional~~ extra draw for a $250 prize.

Please log-in using the username and password provided on the letter you received

Username and passwords are not case sensitive

Username:	
Password:	

If you have any questions about this study, with accessing the survey online or would prefer to complete the survey over the phone please call the Ipsos Survey Hotline on 1800 796 666 (freecall).

Results of this survey will be made available on www.spokes.com.au and www.tacsafety.com.au in December 2014

Privacy statement:

The results of this study will be reported in aggregate and your responses will remain anonymous. You should be aware that your name and contact details will be removed from your responses to this survey once all surveying is complete. When this has been done we will no longer be able to identify you with the responses you provided.

If you choose to enter the prize draw, your name and contact details will not be linked to your responses. However, for the period until the prize draw, your name and contact details will remain on file separate to your survey responses.

You will also be asked if you would be interested in taking part in other research for the Transport Accident Commission (the TAC). Your name and contact details will be collected separately to the prize draw and will only be forwarded to the TAC if you agree. Your personal details will remain separate to your responses.

You are able to contact us to request that we delete all of your personal information. If you wish to do this, please email motorcyclesurvey@ipsos-research.com or feel free to contact the survey Completion Line on **1800 796 666**.

Your name was randomly selected to take part in this research from a list of all Victorian motorcycle licence holders and those with registered motorcycles in their name from the VicRoads database. *To view VicRoad's privacy statement online please click here*

Note: *The Australian Market and Social Research Society's Surveyline on 1300 364 830 is available for you to call if you would like to check if Ipsos is recognised by the society as a bona fide research company*

---------- [NEW SCREEN] ----------

Please note your responses will be anonymous. The results of this survey will be reported as a summary of the overall findings and will not contain details of who took part.

INSTRUCTIONS:

Please DO NOT USE the 'Back' and 'Forward' buttons in the browser. **Doing so means you *may* have to start the survey again.** Please use the buttons at the bottom of each screen.

If you are unable to finish the survey in one sitting, you can re-visit the survey by going to the link in your invitation letter and re-entering your username and password. The survey should open where you left off.

---------- [NEW SCREEN] ----------

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.

[INSERT IMAGE OF MOTORCYLES INCLUDED]

This survey **EXCLUDES** motorised bicycles, quad bikes and toy motorcycles such as monkey bikes when referring to motorcycles.

[INSERT IMAGE OF MOTORCYLES NOT INCLUDED]

[PROGRAMMING NOTE: PLEASE DO NOT INCLUDE SECTION HEADINGS ON SCREEN]

---------- [NEW SCREEN] ----------

SECTION A: DEMOGRAPHICS

[ASK ALL]

Q1. How old are you? *(type in number of years)* **[OPEN RESPONSE]**

☐ Years

[LOGIC CHECK MUST BE AT LEAST 18 years but less than 99 years]

Q2. Are you…?

Male ---------- 01
Female ---------- 02

Q3. What is your current employment status? *Select all that apply* **[MULTIPLE RESPONSE]**

Employed full-time ---------- 01
Employed part-time or casual ---------- 02
Self-employed ---------- 03
Student ---------- 04
Unemployed ---------- 05
Home duties ---------- 06
Retired ---------- 07
Other **[SPECIFY]** ---------- 97

---------- **[NEW SCREEN]** ----------

SECTION B: HISTORY OF MOTORCYCLE USE

[ASK ALL]

Q4. Do you have a **motorcycle** licence? *Select one only*

Yes - Learner ---------- 01
Yes - Probationary ---------- 02
Yes - Full ---------- 03
~~No - no motorcycle/motor-scooter licence ---------- 04~~
No - Never held a motorcycle/motor-scooter licence ---------- 05
No – No longer hold a motorcycle/motor-scooter licence ---------- 06

---------- **[NEW SCREEN]** ----------

[DISPLAY FOLLOWING TEXT]

Please note:
For the purposes of this survey, a motorcycle includes all types of road bikes, off-road/trail bikes, scooters, or mopeds.
*The following are **NOT** considered to be motorcycles: quad bikes, motorised bicycles; and toy motorcycles such as monkey bikes.*

---------- **[NEW SCREEN]** ----------

SECTION C: LEARNING TO RIDE

[Q11 MOVED HERE]

[NOTE CHANGE IN FILTER in 2013]

[ASK IF Q4 NOT = 05]

Q11. At what age did you start riding a motorcycle**?** *Please type in number of years*

☐ Years

[LOGIC CHECK FOR AGE – MUST BE Q1 (Age) AT THE MOST; MUST BE <=5 – Error message – "You must enter 5 or older"]

---------- **[NEW SCREEN]** ----------

[NEW in 2013]

Q11B. Who taught you to ride a motorcycle? *Select all that apply* **[MULITPLE RESPONSE]**

Self-taught ---------- 01
Taught by parents ---------- 02
Taught by other family members ---------- 03
Taught by friends ---------- 04
Taught by an accredited riding instructor ---------- 05
Never learned to ride ---------- 06
Other **[SPECIFY]** ---------- 97

[NEW in 2013]

Q11C. Where did you learn to ride? *Select all that apply* **[MULTIPLE RESPONSE]**

Did a learners' course (e.g. Stay Upright) ---------- 01
Trial day (e.g. at a race track) ---------- 02
Off-road in national/state parks ---------- 03
Off-road on private property ---------- 04
On quiet back streets ---------- 05
Never learned to ride ---------- 06
Other **[SPECIFY]** ---------- 97

[IF Q11C = 06 – GO TO Q10]

---------- **[NEW SCREEN]** ----------

[NEW in 2013]

Q11D. How would you describe your riding experience prior to gaining your motorcycle learners permit? *Select one only*

Minimal (never ridden a motorcycle or only ridden a few times before getting my learners permit) ---------- 01
Moderate (ridden a motorcycle several times prior to gaining a learners permit) ---------- 02
Experienced (capable rider when learners permit attained) ---------- 03

[NEW in 2013]

Q11E What kind of motorcycle did you first learn to ride on? *Select one only*

Road bike ---------- 01
Scooter ---------- 02
Off-road bike ---------- 03
Other **[SPECIFY]** ---------- 97

---------- [NEW SCREEN] ----------

SECTION D: RIDING HISTORY

[IF Q4=2 OR 3 OR 6 (Full or Probationary licence holder), ASK]

Q5. How old were you when you got your motorcycle licence? *Please exclude any time on L plates*

☐ Years

[LOGIC CHECK FOR AGE – MUST =< Q1 AGE]

---------- [NEW SCREEN] ----------

[IF Q4=1 (Learner licence holder), ASK]

Q6. How old were you when you got your motorcycle learner's permit? *Please type in number of years*

☐ Years

[LOGIC CHECK FOR AGE – MUST =< Q1 AGE]

---------- [NEW SCREEN] ----------

[ASK ALL]

Q10.

Which of the following best describes your motorcycle riding history since you got your permit or licence? *Select one only*

I have never had a break from riding since learning to ride **and** ride regularly ---------- 01
I have never had a break from riding since learning to ride **but** only ride occasionally---------- 02
I had a break from riding and have started riding again ---------- 03
I have stopped riding and may decide to ride in future---------- 04
I have stopped riding and do not intend to ride again ---------- 05
I have never ridden a motorcycle---------- ---------- 06

[NOTE SHOW CODES 1-6 IF Q4=5; SHOW CODES 1-5 if Q4 =1-3 OR 6]

[IF Q10 = 06 GO TO Q65]

---------- [NEW SCREEN] ----------

Q7. Have you ridden a motorcycle in the last 12 months (either on or off-road)?

Yes ---------- 01
No ---------- 02

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[ASK IF Q10 = 04 OR IF Q7 = 2 **(If stopped riding but may ride in the future OR not ridden in last 12 months)]**

Q7A. What is the likelihood that you will ride again in the future? *Please use a 0-10 scale 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	99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[ASK IF Q10 = 03 (If had a break from riding and started again)]

Q7B. You have said you have had a break from riding and have started riding again. Approximately, how long was the most recent break?

Up to 11 months ---------- 01
1-2 years ---------- 02
3-5 years ---------- 02
6-10 years ---------- 04
11-15 years ---------- 05
16-20 years ---------- 06
21 years or more ---------- 07

---------- [NEW SCREEN] ----------

[IF Q7 = 1 (Ridden in last 12 months), ASK]

Q8. 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) compared to driving a car? *Please enter percentages*

a) Drive a car %
b) Ride a motorcycle %

TOTAL **100%**

[USE TALLY TO SHOW WHEN TOTAL EQUALS 100%; NOTE: *Ride a motorcycle must be more than 0%]*

[PROGRAMMING INSTRUCTION – DRIVING CAN BE 0%)

---------- [NEW SCREEN] ----------

Q12. [DELETED IN 2013 – REPLACED WITH Q11E]

---------- [NEW SCREEN] ----------

Q13. Have you ever done any motorcycle rider training courses? *Select all that apply* **[MULTIPLE RESPONSE, RANDOMISE]**

Learners' course (e.g. Stay Upright) ---------- 01

Advanced rider training ---------- 02
Track day riding courses---------- 03
HART course ---------- 04
DECA course ---------- 05
Australian /California Superbike School ---------- 06
Other **[SPECIFY]** ---------- 97

None of the above **[EXCLUSIVE]** ---------- 99

---------- **[NEW SCREEN]** ----------

[(**Q10** = 4 AND Q7=2) OR (**Q10** =5 AND Q7=2) (If stopped riding) ASK]

Q14. How old were you when you stopped riding?

☐ Years

[LOGIC CHECK FOR AGE –MUST BE >= Q5 OR >= Q6 AND <= Q1 (Age)]

---------- **[NEW SCREEN]** ----------

[IF Q7 = 2 (NOT Ridden in last 12 months) AND **Q10** =1,2,3 OR 4 ASK]

Q9. What are the main reasons why you haven't ridden a motorcycle in the last 12 months? *Select all that apply* **[MULTIPLE RESPONSE; RANDOMISE]**

Motorcycle related injury---------- 01
Non-motorcycle related injury ---------- 02
Went overseas/holiday ---------- 03
No longer own a motorcycle ---------- 04
Too expensive to maintain a motorcycle ---------- 05
Family commitments/change in lifestyle ---------- 06
Motorcycle broken down---------- 07
Moved locations, so became too far to ride---------- 08
Too busy/never have time to ride---------- 09
Prefer to travel using other modes (drive, cycle, public transport etc. ---------- 10
Licence suspended ---------- 11
Other **[SPECIFY]** ---------- 97

---------- **[NEW SCREEN]** ----------

[IF **Q10** = 5 (Stopped riding and won't ride again), ASK]

Q9a. What are the main reasons you stopped riding? *Select all that apply* **[MULTIPLE RESPONSE; RANDOMISE]**

Motorcycle related injury---------- 01
Non-motorcycle related injury ---------- 02
Too expensive to maintain a motorcycle ---------- 03
Family commitments/change in lifestyle ---------- 04
Moved locations, so became too far to ride---------- 05
Too busy/never have time to ride---------- 06

Prefer to travel using other modes (drive, cycle, public transport etc. ---------- 07
Licence suspended ---------- 08
Safety concerns ---------- 09
No longer interested in riding/motorcycles ---------- 10
Other **[SPECIFY]** ---------- 97

---------- **[NEW SCREEN]** ----------

SECTION E: MOTORCYCLES IN YOUR HOUSEHOLD

[NOTE CHANGE IN FILTER IN 2013]

[ASK ALL]

Q15. How many motorcycles are kept at your home address **regardless of who owns them or registration status?** *Please exclude any motorcycles that have not been ridden in at least 12 months and that are not likely to be ridden in the next 12 months.*

[ADD IMAGES OF MOTORCYCLES TO INCLUDE AND MOTORCYCLES TO EXCLUDE HERE]
[SPLIT UP ROAD AND OFF ROAD]

Q15_1		Road Motorcycles
Q15_2		Off-road motorcycles

I have no motorcycles kept at my home address ---------- 99 **[EXCLUSIVE]**

---------- [NEW SCREEN] ----------

[ASK IF (Q15a) + Q15b)) >=1 AND NOT 99 (At least 1 bike kept at home address)]

Q16. Please provide details of the motorcycle you ride **most of the time**:

	Q16 i) TYPE OF BIKE *Please select*	Q16 ii) MAKE/BRAND Please select	Q16 iii) -YEAR OF MANUFACTURE Please type year i.e. 1980 **(Optional)** **[LOGIC CHECK 1900-2014 - OPTIONAL]**	Q16 iv) CAPACITY *Please select*	Q16 v)--**[DELETED 2014]**	Q16 vi) Registered?	Q16 vii) **[NEW IN 2014]** YEAR PURCHASED Please type year i.e. 1980 (Optional) **[LOGIC CHECK 1900-2014 AND MUST BE GREATER OR EQUAL TO Q16iii– OPTIONAL]**
a.	DROP DOWN	DROP DOWN	PLEASE TYPE	DROP DOWN		DROP DOWN	PLEASE TYPE

['Drop down menus' BELOW:]

Type of bike PLEASE SELECT		MAKE/BRAND		CAPACITY		Registered?	
Off road bike/trail bike	01	Aprilia	01	0-125cc	01	Road registered	01
Road bike- Sports bike	02	Bolwell	02	126-250cc	02	Recreational registered	03
Road bike- Sports tourer	03	BMW	03	251-400cc	03	Farm bike registered	04
Road bike - Dual sport	04	Bug	04	401-550cc	04	Not registered	05
Road bike - Tourer/cruiser	05	Buell	05	551-700cc	05	Unknown	99
Road bike - Other please specify	06	Ducati	06	701-850cc	06		
Scooter	08	Harley Davidson	07	851-1000cc	07		
Other specify	97	Honda	08	1001-1200cc	08		
Don't know	99	Husqvarna	09	1201-1400cc	09		
		Hyosung	10	1401cc+	10		
		Kawasaki	11	Don't know	99		
		KTM	12				
		Moto Guzzi	13				
		MV Agusta	14				
		Piaggio	15				
		Suzuki	16				
		TGB	17				
		Triumph	18				
		Vespa	19				
		Victory	20				

	VMoto 21 Yamaha 22 Other: Specify 97 Don't know 99		

---------- [NEW SCREEN] ----------

[ASK IF Q16 i = 6]
Q16i(6)Specify:
You selected "other road bike", please provide details of the type of road bike you ride most of the time. **[OPEN ENDED]**

[ASK IF Q16 i = 97]
Q16i (97)Specify:
You selected "other type of bike", please provide details of the type of bike you ride most of the time. **[OPEN ENDED]**

[ASK IF Q16ii) = 97]
Q16ii(97)Specify:
You selected "other make/brand", please provide details of the make/brand of bike you ride most of the time. **[OPEN ENDED]**

[ASK IF (Q15a) + Q15b)) >=1 AND NOT 99 (At least 1 bike kept at home address)]

Q16viii) **[NEW IN 2014]**

What is the odometer reading on the bike you mainly ride? *An approximate number of kms is okay. (Optional)*

km

---------- [NEW SCREEN] ----------

[CHANGE IN FILTER IN 2013]

[ASK IF (Q15_1 + Q15_2) >=2 AND Q15_99 NOT = 1 (At least 2 bikes kept at home address)]

Q17. Please provide details of any **other motorcycles** (excluding the one you ride most often) that are kept at your home address:

[Programming: CREATE TABLE WITH (Q15_1 + Q15_2) MINUS 1 ROWS TO MAX OF 3 ROWS]

[Programming: INSERT TEXT IF MORE THAN 4 MOTORCYCLES IN TOTAL: You have listed that there are **[INSERT NUMBER MINUS 1]** other motorcycles held at your home address, please provide details of the 3 that are ridden most often.**]**

	Q17 i)--- TYPE OF BIKE *Please select*	Q17 ii) MAKE/BRAND *Please select*	Q17 iii) - YEAR OF MANUFACTURE *Please type year i.e. 1980 (Optional)* [LOGIC CHECK 1900-2014 - OPTIONAL]	Q17 iv) - CAPACITY *Please select*	Q17 [DELETED 2014]	Q17 [NEW IN 2013] v) --Registered?	Q17 vii) YEAR PURCHASED *Please type year i.e. 1980 (Optional)* [LOGIC CHECK 1900-2014 - OPTIONAL]
b.	DROP DOWN	DROP DOWN	PLEASE TYPE	DROP DOWN		DROP DOWN	PLEASE TYPE
c.	DROP DOWN	DROP DOWN	PLEASE TYPE	DROP DOWN		DROP DOWN	PLEASE TYPE
d.	DROP DOWN	DROP DOWN	PLEASE TYPE	DROP DOWN		DROP DOWN	PLEASE TYPE

['Drop down menus' BELOW:]

Type of bike PLEASE SELECT		MAKE/BRAND		CAPACITY		Registered?	
Off road bike/trail bike	01	Aprilia	01	0-125cc	01	Road registered	01
Road bike- Sports bike	02	Bolwell	02	126-250cc	02	Recreational registered	03
Road bike- Sports tourer	03	BMW	03	251-400cc	03	Farm bike registered	04
Road bike- Dual sport	04	Bug	04	401-550cc	04	Not registered	05
Road bike- Tourer/cruiser	05	Buell	05	551-700cc	05	Unknown	99
Road bike- Other please specify	06	Ducati	06	701-850cc	06		
Scooter	08	Harley Davidson	07	851-1000cc	07		
Other specify	97	Honda	08	1001-1200cc	08		
Don't know	99	Husqvarna	09	1201-1400cc	09		
		Hyosung	10	1401cc+	10		
		Kawasaki	11	Don't know	99		
		KTM	12				
		Moto Guzzi	13				
		MV Agusta	14				
		Piaggio	15				
		Suzuki	16				
		TGB	17				
		Triumph	18				
		Vespa	19				
		Victory	20				
		VMoto	21				
		Yamaha	22				
		Other: Specify	97				
		Don't know	99				

[PROGRAMMING NOTE: HOVER OVER TEXT OVER FIRST "MOTORCYCLES"

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.**]**

---------- [NEW SCREEN] ----------

[ASK IF Q17b-d i)= 6]
Q17i)b (6)Specify:
You selected “other road bike” for the **second** bike you ride, please provide details of what type of road bike it is. **[OPEN ENDED]**

Q17i)c (6)Specify:
You selected “other road bike” for the **third** bike you ride, please provide details of what type of road bike it is **[OPEN ENDED]**

Q17i)d (6)Specify:
You selected “other road bike” for the **fourth** bike you ride, provide details of what type of road bike it is **[OPEN ENDED]**

[ASK IF Q17b-d i) = 97]
Q17i)(97)Specify:
You selected “other type of bike”, for the **second** bike you ride, please provide details of what type of bike it is. **[OPEN ENDED]**

Q17i)c (97)Specify:
You selected “other type of bike”, for the **third** bike you ride, please provide details of what type of bike it is. **[OPEN ENDED]**

Q17i)d (97)Specify:
You selected “other type of bike”, for the **fourth** bike you ride, please provide details of what type of bike it is. **[OPEN ENDED]**

[ASK IF Q17ii)= 97]
Q17ii)b (97)Specify:
You selected “other make/brand”, for the **second** bike you ride, please provide details of what make/brand it is. **[OPEN ENDED]**

Q17ii)c (97)Specify:
You selected “other make/brand”, for the **third** bike you ride, please provide details of what type of bike this is. **[OPEN ENDED]**

Q17ii)d (97)Specify:
You selected “other make/brand”, for the **fourth** bike you ride, please provide details of what type of bike this is. **[OPEN ENDED]**

---------- [NEW SCREEN] ----------

SECTION F: YOUR RECENT MOTORCYCLING ACTIVITY

[ASK IF Q7 = 1 (If ridden in last 12 months) AND Q10 = 1, 2, OR 3]

Q18. 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?** *Please enter percentages.*

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

[USE TALLY TO SHOW WHEN TOTAL EQUALS 100%]

---------- [NEW SCREEN] ----------

Q19. [DELETED 2013]

Q20. [DELETED 2013]

Q21. [DELETED 2013]

Q22. [DELETED 2013]

Q23. [DELETED 2013]

Q24. [DELETED 2013]

---------- [NEW SCREEN] ----------

[IF Q18 b)> 0% OR Q18 c)> 0% (If ride recreationally on or off road), ASK]

Q25. Where do you do most of your recreational riding (on-road or off-road)? *Select all that apply* **[MULTIPLE RESPONSE]**

State/national parks ---------- 01
Private land ---------- 02
Public roads in metro areas ---------- 03
Public roads in rural/non-built up areas ---------- 04
Other **[SPECIFY]** ---------- 97

[NEW IN 2013]

[IF Q18 b)> 0% OR Q18 c)> 0% (If ride recreationally on or off road), ASK]

Q25A. When riding recreationally (on-road or off-road), do you *mainly* ride...?

On your own ---------- 01
With 1 other person ---------- 02
With 2-3 other people ---------- 03
4 -6 other people ---------- 04
7 or more other people ---------- 05

---------- **[NEW SCREEN]** ----------

Q26. **[DELETED 2013]**

Q26A. **[DELETED 2014]**

Q26B. **[DELETED 2014]**

Q27. **[DELETED 2013]**

Q28. **[DELETED 2013]**

---------- [NEW SCREEN] ----------

[IF Q7= 1, ASK]

Q29. In the last 12 months, how many kilometres did you ride ON ANY motorcycle **on the road** for any reason? An approximate number is OK. If you have not ridden on the road just enter '0'
Please answer one of the below only.

☐ Km In an average WEEK

[FOR WEEK LOGIC CHECK FOR MUST BE LESS THAN 9999 Error message: "Response must be lower than 9999 in an average week"]

OR

☐ Km In an average MONTH

[LOGIC CHECK FOR MONTH MUST BE LESS THAN 25,000 – Error message: "Must be lower than 25000 for an average month"]

OR

☐ Km In the last YEAR

[LOGIC CHECK FOR YEAR MUST BE LESS THAN 250,000 – Error message: "Response must be less than 250000 in a year"]

Don't know/can't say ---------- 99

---------- [NEW SCREEN] ----------

NEW IN 2014
[IF Q7= 1, ASK]

Q29B In the last 12 months, how many hours did you ride ON ANY motorcycle **off road** for any reason? An approximate number is OK. If you have not ridden off-road just enter '0'
Please answer one of the below only.

☐ hours In an average WEEK

[FOR WEEK LOGIC CHECK FOR MUST BE LESS THAN 168 Error message: "Response must be lower than 168 in an average week"]

OR

☐ hours In an average MONTH

[LOGIC CHECK FOR MONTH MUST BE LESS THAN 744 – Error message: "Must be lower than 744 for an average month"]

OR

☐ hours In the last YEAR

[LOGIC CHECK FOR YEAR MUST BE LESS THAN 8,760 – Error message: "Response must be less than 8,760 in a year"]

Don't know/can't say ---------- 99

---------- [NEW SCREEN] ----------

[IF Q10 = 1, 2 OR 3 ASK]

Q30. Are you planning to purchase a motorcycle in the future (either as your first bike, a replacement for or in addition to the one(s) you already have)? *Select one only.*
This can be either new or used.

Yes, in the next 12 months ---------- 01
Yes, after 12 months ---------- 02
No, I am not planning to purchase a motorcycle in the future ---------- 03

I have not decided yet ---------- 04

---------- [NEW SCREEN] ----------

[ASK IF Q30= 01 OR 02 (If planning to purchase a motorcycle in the future)

Q31. Do you intend to buy a new or a used motorcycle? **[SINGLE RESPONSE]**

New motorcycle ---------- 01
Used motorcycle ---------- 02
Haven't decided yet ---------- 03

Q32. What type of motorcycle do you intend to buy? *Select one only* **[SINGLE RESPONSE]**

Off-road bike [HEADING ONLY]
Off road bike/trail bike ---------- 01

Road bike [HEADING ONLY]
Sports bike ---------- 02
Sports tourer ---------- 03
Dual sport ---------- 04
Tourer/cruiser ---------- 05
Scooter ---------- 07
Other road bike **[PLEASE SPECIFY]** ---------- 08

Other specify ---------- 97
Can't recall ---------- 99

Q33. What brand/make of motorcycle are you most likely to buy? **[OPEN ENDED]**

---------- [NEW SCREEN] ----------

[ASK IF Q32= 01 (planning to purchase an off-road motorcycle

Q34. You have said you are planning to purchase an off road or trail bike. Do you intend to register this off road/trail bike?

Yes - with full road registration ---------- 01
Yes - with recreational registration ---------- 02
Yes – with farm bike registration ---------- 04
No, I do not intend to register this motorcycle ---------- 03

---------- [NEW SCREEN] ----------

[IF 0 = 03 (No don't intend to register off-road motorcycle)

Q35. Why don't you plan to register this off road trail bike? *Select all that apply* **[RANDOMISE]**

Cost of registration ---------- 01
Inconvenience ---------- 02
I won't ride it much ---------- 03
I don't have to register it ---------- 04
Didn't know I could register it ---------- 97
Other **[PLEASE SPECIFY]** ---------- 05
Don't know/can't say ---------- 99

---------- [NEW SCREEN] ----------

[IF Q10 = 1, 2 OR 3 ASK]

Q36. Have you heard of any of the following motorcycle safety features? *Select all that apply.* **[MULTIPLE RESPONSE, RANDOMISE]**

ABS (Anti-lock braking system) ---------- 01
Low tyre pressure indicators ---------- 02
Speed limiter function ---------- 03
Blind spot warning sensor ---------- 04
Traction control ---------- 05
Emergency brake assist (EBA) ---------- 06
Electronic brake force distribution (EDA) ---------- 07
~~Automatic brake drying ---------- 08~~
Airbags (on bike) ---------- 10
Airbags (in clothing) ---------- 11
Electronic Stability Control ---------- 12
Other **[SPECIFY]** ---------- 97

I have heard of none of the above ---------- 99

---------- [NEW SCREEN] ----------

[[ASK IF Q15 >=1 AND NOT 99 (At least 1 bike kept at home address)]

AND IF Q16ai NOT 01 (i.e. MAIN MOTORCYLE IS NOT OFF ROAD)]

Q37. Does your current road motorcycle (the one you mostly ride) have ABS (Anti-lock braking system)?

Yes ---------- 01
No ---------- 02
Don't know ---------- 99

---------- [NEW SCREEN] ----------

[ASK IF Q30= 01 (Intend to buy a motorcycle in next 12 months) OR 02 and Q32 IS NOT 01 (Not an off-road motorcycle)] Would you look for ABS (Anti-lock braking system) on your next motorcycle?

Yes ---------- 01
No ---------- 02
Haven't decided yet ---------- 99
Didn't know it was available---------- 97

---------- [NEW SCREEN] ----------

SECTION G: PROTECTIVE MOTORCYCLE CLOTHING

[ASK ALL OF SECTION E IF Q7 = 1 (Ridden in last 12 months) AND Q10 = 1, 2 OR 3 (Currently riding)]

Q38. How many of the following do you own? If you do not own any, please insert 'O' **[MULTIPLE RESPONSE]**

Please hover mouse over the items for an image of relevant item if you are not sure

[INSERT IMAGES TO APPEAR WHEN MOUSE HOVERS OVER PROTECTIVE GEAR]

Item	**Insert number**
aa) Motorcycle helmet – open face **[NEW IN 2013]**	
ab) Motorcycle helmet – full face **[NEW IN 2013]**	
~~a) Motorcycle helmet~~	
b) Pair(s) of motorcycle riding boots	
c) Pair(s) of motorcycle riding gloves	
d) Motorcycle riding jacket(s)	
e) Pair(s) of motorcycle riding pants	
f) One piece riding suit(s) *(Note: this refers to a suit where parts cannot be detached to be worn as separate pieces)*	

---------- [NEW SCREEN] ----------

[IF ANY Q38 a-f >1 ASK:]

Q39. You have mentioned that you own multiple:

[INSERT PROTECTIVE ITEMS FROM Q38 IF GREATER THAN 1
IF Q38 aa) + ab) >1 INSERT Motorcycle helmets
IF Q38 b) >1 INSERT Pairs of motorcycle riding boots
IF Q38 c) >1 INSERT Pairs of motorcycle riding gloves
IF Q38 d) >1 INSERT Motorcycle riding jackets
IF Q38 e) >1 INSERT Pairs of motorcycle riding pants
IF Q38 f) >1 INSERT One piece riding suits**]**

What are the main reasons you have more than one of the above? **[OPEN ENDED]**

---------- [NEW SCREEN] ----------

[IF Q38 NOT (AB, C D AND E = ALL AT LEAST 1) OR (AB, C AND F = ALL AT LEAST 1), ASK]

[IF Q38 NOT (AA, C D AND E = ALL AT LEAST 1) OR (AA, C AND F = ALL AT LEAST 1), ASK]

[Note: Programming filter changed in 2014]

Q40. What are the main reasons you don't own more protective motorcycle clothing? *Select all that apply*
[MULTIPLE RESPONSE, RANDOMISE]

Too expensive ---------- 01
Don't think I need it ---------- 02
Haven't gotten around to buying it ---------- 03
Inconvenient to put on/wear ---------- 04
Only do country/off-road riding ---------- 05
Uncomfortable to wear / restrictive to wear ---------- 06
I rarely ride my bike ---------- 07
I only ride for short trips ---------- 08
Other **[SPECIFY]** ---------- 97

---------- [NEW SCREEN] ----------

[ASK IF Q7 = 1 (Ridden in last 12 months) AND Q10 = 1, 2 OR 3 (Currently riding)]

Q41. When riding a motorcycle, how often do you wear the following items of protective motorcycle clothing?

	All the time	Most of the time	About half the time	Some of the time	Never	Don't Know
a) Motorcycle helmet	05	04	03	02	01	99
b) **[DELETED 2014]**	05	04	03	02	01	99
c) Motorcycle riding gloves	05	04	03	02	01	99
d) Motorcycle riding jacket	05	04	03	02	01	99
e) Motorcycle riding pants	05	04	03	02	01	99
f) One piece riding suit (Note: this refers to a suit where parts cannot be detached to be worn as separate pieces)	05	04	03	02	01	99
g) **[DELETED 2014]**	05	04	03	02	01	99
h) **[NEW IN 2014]** Any type of boots (i.e. motorcycle specific riding boots or any other shoes that cover your ankles)	05	04	03	02	01	99

---------- [NEW SCREEN] ----------

[ASK IF Q7 = 1 (Ridden in last 12 months) AND **Q10** = 1, 2 OR 3 (Currently riding)]

[NEW IN 2014]

Q41A. What percentage of the time do you wear the following when riding a motorcycle? *Please enter percentages.*

a) Boots made specifically for motorcycle riding ____ %
b) Other boots (i.e. boots that cover your ankles) ____ %
c) Other footwear (i.e. sneakers or other shoes) ____ %
d) No footwear/thongs/bare feet ____ %

TOTAL **100%**

[USE TALLY TO SHOW WHEN TOTAL EQUALS 100%]

---------- [NEW SCREEN] ----------

[NOTE NEW FILTER IN 2014]

[SKIP Q42 IF Q41 A, C, D AND E ALL = 5 AND Q41A. a) + b) EQUAL TO 100% (Full gear with any boots all the time) OR Q41 A, C, AND F ALL = 5 AND Q41A. a) + b) EQUAL TO 100% (One piece suit with riding boots)]

Q42. You have said you do not wear a jacket with pants (or one piece suit) with boots, gloves and helmet every time you ride. What are the main reasons you do not wear a complete set of gear every time you ride? **[OPEN RESPONSE]**

---------- [NEW SCREEN] ----------

Q43. Do you own any of the following pieces of body armour? *Select all that apply This includes body armour that forms part of other gear i.e. inside a jacket etc.* **[MULTIPLE RESPONSE]**

Back protector (separate piece) ---------- 01
Chest protector (separate piece) ---------- 02
Inserts for riding jackets---------- 03
Inserts for riding pants---------- 04
~~Pressure suit~~ ---------- ~~05~~
Body armour kit ---------- 08
LEATT Neck brace ---------- 06
Other body armour **[PLEASE SPECIFY]**---------- 07

None of the above---------- 99

---------- [NEW SCREEN] ----------

Q44. What, if any, motorcycle clothing do you intend to buy in the next 6 months? *Select all that apply* **[MULTIPLE RESPONSE – EXCLUSIVE 01]**

Don't intend to buy any---------- 01
Helmet---------- 02
Gloves ---------- 03
Boots---------- 04
Jacket---------- 05
Pants---------- 06
Body Armour---------- 07
LEATT Neck Brace---------- 08
Other **[SPECIFY]** ---------- 97
Don't know ---------- 99

---------- [NEW SCREEN] ----------

Q45. When purchasing motorcycle clothing, do you look for the CE (European Union), the Snell logo or other motorcycle protective clothing standard marks on garments? **[INSERT NEW image of CE logo and SNELL LOGO BSI logo]**

Yes ---------- 01
No ---------- 02
Don't know what the CE (European Union) standard and/or Snell is ---------- 99

---------- [NEW SCREEN] ----------

SECTION H: ATTITUDES AND BEHAVIOURS

[ASK SECTION F Q46-Q48E IF Q7=1 (If ridden in last 12 months) AND Q10 = 1-3 (Haven't had a break from riding or had a break and are riding again)]

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.

Q46. Have you been pulled over by police **for any reason** while riding your motorcycle in the last 12 months?

Yes ---------- 01
No ---------- 02
Prefer not to say ---------- 98
Can't recall ---------- 99

---------- [NEW SCREEN] ----------

[ASK IF Q46=1]

Q47. Why were you pulled over? *If you have been pulled over more than once, or for multiple reasons, please select all that apply.* **[MULTIPLE RESPONSE, RANDOMISE]**

Breath tested ---------- 01
Drug tested ---------- 02
Loud pipes/exhaust ---------- 03
Routine licence check ---------- 04
Speeding ---------- 05
Other **[PLEASE SPECIFY]** ---------- 06
Prefer not to say ---------- 98
Can't recall ---------- 99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[IF Q7=1 (If ridden in last 12 months) AND Q10 = 1-3 (Haven't had a break from riding or had a break and are riding again)]

Q47A. In the last 12 months, how many times, if any, have you been **breath-tested** when riding your motorcycle?

Please select from below or type in number of times
Zero ---------- 00

	times

Prefer not to say ---------- 98
Can't recall ---------- 99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[IF Q7=1 (If ridden in last 12 months) AND Q10 = 1-3 (Haven't had a break from riding or had a break and are riding again)]

Q47B. In the last 12 months, how many times, if any, have you been **drug-tested** when riding your motorcycle? *Please select from below or type in number of times*

Zero ---------- 00

times

Prefer not to say ---------- 98
Can't recall ---------- 99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[ASK IF Q47B NOT 0, 98 or 99]

Q47C Thinking of the most recent time, what type of drug test was it? *Select one only*

Saliva test ---------- 01
Breath test---------- 02
Other test **[PLEASE SPECIFY]**---------- 03

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[IF Q7=1 (If ridden in last 12 months) AND Q10 = 1-3 (Haven't had a break from riding or had a break and are riding again)]

Q47D In the last 12 months, have you ridden your motorcycle when you knew, or thought you were possibly over the legal blood alcohol limit?

Yes ---------- 01
No ---------- 02
Not applicable (I don't drink alcohol)---------- 03
I'd prefer not to say---------- 99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[ASK IF Q47D = 01 (Drove over limit)]

Q47E. What was the main reason for riding your motorcycle when you knew or thought you were over the legal blood alcohol limit? **[OPEN ENDED]**

[NOTE NEW FILTER IN 2013]

[ASK ALL]

Q48. Have you been **caught** speeding while riding your motorcycle (not in your car or other vehicle) in the last 12 months (either by police or a fixed/mobile camera)?

Yes ---------- 01
No ---------- 02
I'd prefer not to say---------- 99

---------- [NEW SCREEN] ----------

[IF Q48 = 01 (if caught speeding), ASK

Q49. How many times have you been caught speeding on your motorcycle in the last 12 months?

times

I'd prefer not to say---------- 99

---------- [NEW SCREEN] ----------

[ASK ALL IN 2013]

Q50. How fast should people be allowed to ride a motorcycle in a **60km/h** zone without being booked for speeding?

km per hour

Don't know ---------- 99

---------- [NEW SCREEN] ----------

[IF 0>60 NOT 99, ASK]

Q51. When you have the opportunity, how often do you ride above **[INSERT 0]** km per hour in a 60km/h zone? *Select one only*

None of the time ---------- 01
Some of the time (Less than half but not never) ---------- 02
About half the time (50%) ---------- 03
Most of the time (More than half but not all) ---------- 04
All of the time ---------- 05
Don't know ---------- 99

---------- [NEW SCREEN] ----------

IF 0<=60 OR 0 = 99, ASK]

Q52a When you have the opportunity, how often do you ride **above 60km per hour** in a 60km/h zone? *Select one only*

None of the time ---------- 01
Some of the time (Less than half but not never) ---------- 02
About half the time (50%) ---------- 03
Most of the time (More than half but not all) ---------- 04
All of the time ---------- 05
Don't know ---------- 99

---------- [NEW SCREEN] ----------

[ASK ALL IN 2013]

Q52. How fast should people be allowed to ride a motorcycle in a **100km/h** zone without being booked for speeding?

	km per hour

Don't know ---------- 99

---------- [NEW SCREEN] ----------

[IF Q52>100 ASK:]

Q53. When you have the opportunity, how often do you ride above [INSERT Q52] kph in a 100km/h zone? *Select one only*

None of the time ---------- 01
Some of the time (Less than half but not never) ---------- 02
About half the time (50%) ---------- 03
Most of the time (More than half but not all) ---------- 04
All of the time ---------- 05
Don't know ---------- 99

---------- [NEW SCREEN] ----------

[IF Q52<=100 OR Q52=99 ASK:]

Q54a When you have the opportunity, how often do you ride **above 100kph** in a 100km/h zone? *Select one only*

None of the time ---------- 01
Some of the time (Less than half but not never) ---------- 02
About half the time (50%) ---------- 03
Most of the time (More than half but not all) ---------- 04
All of the time ---------- 05
Don't know ---------- 99

---------- [NEW SCREEN] ----------

[ASK ALL]

Q54. To what extent do you agree or disagree with the following statements? **[RANDOMISE STATEMENTS]**

		Strongly disagree	Somewhat disagree	Neither	Somewhat agree	Strongly agree	Don't know
a)	I ride over the speed limit if I'm sure I'll get away with it	01	02	03	04	05	99
b)	I think motorcyclists should always wear motorcycle clothing (jacket, pants, boots and gloves) while riding	01	02	03	04	05	99
c)	**[REMOVED IN 2013]**						
d)	**[REMOVED IN 2014]**	01	02	03	04	05	99
e)	Motorcycle clothing protects me in the event of a crash	01	02	03	04	05	99
f)	**[NEW in 2013]** Riding while tired can be as dangerous as drink-riding	01	02	03	04	05	99
g)	**[NEW in 2013- CHANGE IN WORDING 2014]** The only remedy for ~~fatigue~~ feeling drowsy while riding is to stop riding and rest	01	02	03	04	05	99
h)	**[NEW IN 2013]** People returning to motorcycling after a break should have to undertake a motorcycle training course	01	02	03	04	05	99
i)	**[NEW IN 2013]** Drivers don't understand what it is like to be a motorcyclist	01	02	03	04	05	99
j)	**[NEW IN 2014]** Wearing boots that cover my ankles will protect my feet better than other shoes would	01	02	03	04	05	99
k)	**[NEW IN 2014]** Most drivers are aware of motorcyclists when they are driving	01	02	03	04	05	99
l)	**[NEW IN 2014]** Motorcyclists can only be safe on the road if both riders and drivers share responsibility for their safety	01	02	03	04	05	99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[ASK ALL]

Q54I. **[DELETED IN 2014 – REPLACED Q54ii. - MULTIPLE RESPONSE]**

~~If you are feeling tired when riding a motorcycle, what do you normally do? [OPEN ENDED]~~

---------- [NEW SCREEN] ----------

[NEW IN 2014]

[ASK ALL]

Q54ii. If you are feeling drowsy when riding a motorcycle, which of the following would you normally do? *Select all that apply*

[RANDOMISE]

Have a break/have a rest ---------- 01
Stop riding ---------- 02
Pull over somewhere e.g. a safe spot or rest area ---------- 03
Have something to eat or drink ---------- 04
Do some exercise e.g. Stretches/walk a bit etc. ---------- 05
Take regular stops e.g. every 2 hours or every 200km etc. ---------- 06
Keep riding but more slowly ---------- 07
Keep riding to get to destination quicker then rest ---------- 08
Other [PLEASE SPECIFY] ---------- 98

---------- [NEW SCREEN] ----------

SECTION G: CRASH HISTORY

[ASK ALL]

Q55. 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.

Yes ---------- 01
No ---------- 02
Prefer not to say ---------- 99

---------- [NEW SCREEN] ----------

NEW IN 2014

[IF Q55 = 1 (experienced a crash) AND Q7=1 (ridden in the last year), ASK]

Q55B. How many times have you had a crash in the last 12 months? (*Type in number of times in box)*

[ ]

---------- [NEW SCREEN] ----------

[IF Q55 = 1 (experienced a crash), ASK]

Q56. Have you required medical treatment as a result of any motorcycle accident?
Yes ---------- 01
No ---------- 02

---------- [NEW SCREEN] ----------

[IF Q56= 1 (experienced a crash that required medical treatment) ASK]

Thinking about the most recent crash where you required medical treatment…

Q57. When did the crash occur? *Select one only*

Within the last 12 months ---------- 01
1 to 5 years ago ---------- 02
6 to 10 years ago ---------- 03
11 or more years ago ---------- 04
Can't say ---------- 99

---------- [NEW SCREEN] ----------

Q60. What type of bike were you riding? *Select one only*

Off-road bike [HEADING ONLY]
Off road bike/trail bike ---------- 01

Road bike [HEADING ONLY]
Sports bike ---------- 02
Tourer/cruiser ---------- 05
Scooter ---------- 07
Sports tourer ---------- 03
Dual sport ---------- 04
Other road bike **[PLEASE SPECIFY]** ---------- 08

Other specify ---------- 97
Can't recall ---------- 99

---------- [NEW SCREEN] ----------

IF Q56= 1, ASK]

Q61. Where did the crash occur? Select one only

Sealed road, built-up area ---------- 01
Sealed-road, rural area ---------- 02
Unsealed road ---------- 03
Track in state park /forest/plantation ---------- 04
Private property ---------- 05
Public land in residential areas (e.g. park, reserve, bicycle track) ---------- 06
On a race track (on a track day or as part of a riding course) ---------- 07
Other **[SPECIFY]** ---------- 97

[IF Q61 = 07 GO TO Q64B]

---------- [NEW SCREEN] ----------

[NOTE NEW FILTER IN 2013]

[IF Q56= 1 (experienced a crash that required medical treatment) AND Q61 =01 OR 02 OR 3 (On sealed or unsealed road) ASK]

Q59. Who do you believe was at fault? *Select one only*

I was at fault ---------- 01
Another party was at fault ---------- 02
Both myself and another party were at fault ---------- 03
No-one was at fault ---------- 04
No other vehicles involved ---------- 05
Other **[SPECIFY]** ---------- 06
Can't say ---------- 99

---------- [NEW SCREEN] ----------

[NEW IN 2013]

[IF Q56= 1 (experienced a crash that required medical treatment) AND Q61 =03 OR 04 OR 05 OR 06 off road surface ASK]

Q59A What caused your crash? *Select as many as apply*

Road/trail conditions ---------- 01
Terrain ---------- 02
Trees (e.g. fallen logs, overhanging branches) ---------- 03
Weather conditions ---------- 04
Rider error ---------- 05
Lapse in concentration ---------- 06
Mechanical failure of the motorcycle ---------- 07
Doing tricks ---------- 08
Other **[SPECIFY]** ---------- 97
Can't say ---------- 99

---------- [NEW SCREEN] ----------

[NEW IN 2014]

[IF Q56= 1 (experienced a crash that required medical treatment)]

Q59B Thinking of your most recent crash that required medical treatment, to what extent do you agree or disagree with the following statements? **[RANDOMISE STATEMENTS]**

		Strongly disagree	Somewhat disagree	Neither	Somewhat agree	Strongly agree	Don't know
a)	I knew the crash area well	01	02	03	04	05	99
b)	I was unfamiliar with the motorcycle I was riding at the time of the crash (i.e. a new bike or borrowed bike)	01	02	03	04	05	99
c)	If I was riding more slowly, I could have done something to avoid the crash	01	02	03	04	05	99
d)	Road/terrain conditions contributed to the crash	01	02	03	04	05	99
e)	I was new to riding at the time	01	02	03	04	05	99
f)	I was returning to riding after a break of a least six months	01	02	03	04	05	99
g)	Another vehicle contributed to the crash	01	02	03	04	05	99
h)	I was tired at the time of the crash	01	02	03	04	05	99
i)	There was nothing I could have done to prevent the crash	01	02	03	04	05	99
j)	Wearing protective clothing helped reduce my injuries	01	02	03	04	05	99

---------- [NEW SCREEN] ----------

[IF Q56= 1, AND NOT Q61 = 07 ASK]

Q62. What sort of treatment did you require? *Select all that apply* **[MULTI RESPONSE]**

Admitted to hospital (in a ward) ---------- 01
Went to Emergency ---------- 02
Treated by ambulance at the scene ---------- 03
Went to my doctor ---------- 04
Saw a physiotherapist/chiropractor or similar ---------- 05
Admitted to a rehabilitation facility ---------- 06
Other **[SPECIFY]** ---------- 97
Can't say/don't recall ---------- 99

---------- [NEW SCREEN] ----------

[IF Q56= 1, ASK]

Q63. Have you ever received any compensation or income support as a result of injuries received from a motorcycle crash? *Select one only*

Yes ---------- 01
No ---------- 02
Prefer not to say ---------- 98

---------- [NEW SCREEN] ----------

[IF 0= 01, ASK]

Q64. From whom did you receive this compensation? *Select all that apply*

TAC ---------- 01
WorkSafe/WorkCover /Comcare ---------- 02
~~Comcare ---------- 03~~
Personal insurance organisation (e.g. health, or income protection) ---------- 04
Property/vehicle insurance organisation ---------- 05
Centrelink (e.g. Disability Support Pension or Sickness Allowance) ---------- 06
Other **[SPECIFY]** ---------- 97
Prefer not to say ---------- 98

---------- [NEW SCREEN] ----------

[NEW IN 2014]

[ASK ALL]

Q64B In 2013, 242 people were killed on Victorian roads.

How many motorcyclists do you think died on Victoria's roads last year?

[LOGIC CHECK MUST BE <= 242]

---------- [NEW SCREEN] ----------

[NEW IN 2014]

[ASK ALL]

Q64C What do you think are the main causes of motorcycle deaths on the roads?

[OPEN ENDED – TO BE CODED]

---------- [NEW SCREEN] ----------

SECTION A: DEMOGRAPHICS (PART 2)

We now have a few questions to help us with the analysis:

[IF Q3 = 1, 2 OR 3 (If employed or self employed) ASK]

Q65. How would you describe your main **paid** occupation? *Select one category only*

Managers and administrators ---------- 01
For example: Hospitality, retail and service managers, Specialist managers, Farmers and farm managers, Chief executives, General managers and legislators

Professionals & Associate professionals ---------- 02
For example: Legal, social and welfare professionals, ICT professionals, Health professionals, Education professionals, Design, engineering, science and transport professionals, Business, human resource and marketing professionals, Arts and media professionals

Technicians and trade workers ---------- 03
For example: Other technicians and trades workers, Skilled animal and horticultural workers, Food trades workers, Electro-technology and telecommunications trades workers, Construction trades workers, Automotive and engineering trades workers, Engineering, ICT and science technicians

Clerical and administrative workers ---------- 04
For example: Other clerical and administrative workers, Clerical and office support workers, Numerical clerks, Inquiry clerks and receptionists, General clerical workers, Personal assistants and secretaries, Office managers and program administrators

Community and personal service workers ---------- 05
For example: Sports and personal service workers, Protective service workers, Hospitality workers, Carers and aides, Health and welfare support workers

Sales workers ---------- 06
For example: Sales support workers, Sales assistants and salespersons, Sales representatives and agents

Machinery operators and drivers ---------- 07
For example: Store person, Road and rail drivers, Mobile plant operators, Machine and stationary plant operators

Labourers and related workers ---------- 08
For example: Food preparation assistants, Farm, forestry and garden workers, Factory process workers, Construction and mining labourers, Cleaners and laundry workers

Other **[SPECIFY]** ---------- 97

---------- [NEW SCREEN] ----------

[IF Q3 = 1, 2 OR 3 (If employed or self employed) ASK]

Q66. How many hours do you work in an average week?

☐ Hours per week

[LOGIC CHECK – MAX OF 168 HOURS]

---------- **[NEW SCREEN]** ----------

[ASK IF Q10 = 1-3 AND Q3 = 1-3]

Q67. Do you ride a motorcycle as part of your employment (excluding any riding to and from work)? *Select one only*

Yes ---------- 01
No ---------- 02

---------- **[NEW SCREEN]** ----------

Q68. [DELETED 2013]

[NEW IN 2013]

Q68A What is your residential postcode?

---------- **[NEW SCREEN]** ----------

[NEW IN 2013]

Q68B [DELETED 2014]

Q68C [DELETED 2014]

---------- **[NEW SCREEN]** ----------

SECTION K: TELEPHONE SERVICES [DELETED]

[DELETED Q69-71]

---------- [NEW SCREEN] ----------

SECTION L: CLOSING

Q72. Lastly, would you like to make any suggestions to the TAC about what they can do to improve rider safety? **[OPEN ENDED; OPTIONAL]**

---------- [NEW SCREEN] ----------

Q73. Would you be interested in participating in other TAC research into motorcycle safety or other road safety related research?

If you are interested in taking part in other research, your name and contact details will be forwarded to the TAC. Please be assured that your personal details will be treated in strict confidence and will remain separate to your responses to this survey.

No, I would not be interested ---------- 01

Yes, I would be interested *(please provide your details below)*---------- 02

Name:
Contact phone:

OR

Email address:

---------- [NEW SCREEN] ----------

Q74. **Thank you. You have reached the end of this survey. The results of this survey will be published on www.spokes.com.au** *and* ***www.tacsafety.com.au*** *in December 2014.*

If you would like to enter the prize draw, please enter your details below

[IF DATE IS 24 June 2014 OR EARLIER – Surveys completed prior to 24 June 2014 will also be entered into an additional prize draw**]**

Note: Your personal details will be treated in strict confidence and will only be used for the purpose of the prize draw. All of your personal details will be deleted once prize draws have been completed. (Please note: this will be kept separate to the details provided in the previous question about future research).

No, I would not be interested in the prize draw ---------- 01

Yes, I would like to enter the prize draw ---------- 03

[IF NOT PROVIDED DETAILS IN Q73 INSERT BOX]:

Please complete your details for the prize draw below

Name:
Contact phone:

OR

Email address:

[CONTACT NUMBER OR EMAIL ADDRESS REQUIRED ONLY]

[BIG BUTTON TO SUBMIT SURVEY RESPONSES]

[REDIRECT TO www.spokes.com.au]