



Ipsos
Social Research Institute

Motorcycle Monitor 2012

Prepared for the Transport and Accident Commission

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1. EXECUTIVE SUMMARY

The Motorcycle Monitor was conducted for the first time in 2012 by the Ipsos Social Research Institute on behalf 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 primarily conducted online with the option to conduct the survey over the phone if participants preferred. A total of 548 motorcycle licence or registration holders completed the survey in April-May 2012 from a sample of 2000.

Learning to ride

The majority of respondents held a full motorcycle licence (96%), with a combined 2% reporting they had either a learner's or probationary licence. The average age respondents first received their motorcycle licence (excluding any years on their Ls) was 24.6 years old.

The average age respondents learnt to ride was 17.6 years old, with male riders starting to ride earlier than their female counterparts (on average 17 compared to 21.7 years old). Respondents who lived in regional Victoria and off-road riders were more likely to start riding at a younger age (15.4 and 13.7 years old respectively).

For the most part, respondents said they learnt to ride away from a rider training environment. More than half (51%) had been self-taught and 38% had been taught by family and/or friends. One in four mentioned they had learnt through a learner riding course (26%). However, when asked specifically about learner rider courses they had attended, 55% said they had taken part in a riding course of some sort.

Riding activity

The majority of respondents said they had ridden in the last 12 months (71%), with younger respondents more likely to have done so than older riders (94% for 18-25 year olds compared to 69% of those aged 26 or older). Family commitments and a lack of motorcycle ownership were the key reasons for not riding in the last 12 months.

More than half of respondents said they either had not taken a break from riding since learning to ride or had returned to riding after taking a break (58%). One in three respondents said they had stopped riding but may ride in the future (35%). A minority of respondents said they had stopped riding and were unlikely to ride again (7%). Of the riders who said they had stopped riding, the average age they stopped was 40.1 years old.

Using the data on recent riding behaviour and riding history, more than half (56%) of respondents could be classified as “active riders” having ridden a motorcycle in the last 12 months without a break since learning or having started riding again after a break. More than one in three (37%) could be classified as “lapsed riders” – having not ridden in the last 12 months but not ruling out riding again in the future. Seven per cent (7%) of respondents were classified as “former riders” with no intentions to ride again in the future. Notably, based on VicRoads data, one in three (33%) active riders did not have a motorcycle at their home address in June 2011. This suggests that while not having a registered motorcycle at home might be an indicator of rider-inactivity or ‘retirement’, it is not a clear predictor.

As to reasons active riders rode their motorcycle - riding for recreational purposes on-road was by far the most prevalent of the three riding purposes covered in the survey with 82% of active riders reporting they had done some recreational on-road riding in the last year. Similar proportions of active riders had either commuted (44%) or rode recreationally off-road (41%) at some point in the previous year.

Motorcycle ownership

The vast majority of active riders said there was at least one motorcycle or scooter kept at their home (90%). Around half of respondents had only one bike at home (47%). As previously mentioned, one third (33%) of active riders did not have a registered motorcycle linked to their home address in June 2011. Of this group, 71% reported they now had at least one bike kept at home – the majority (85%) indicating that they owned the bike they mainly rode.

The most common type of bike mainly ridden by active riders was a road bike (67%). One in four mainly rode an off-road/trail bike (23%) and one in ten a scooter (9%). This is consistent with the prevalence of riding purpose reported by riders.

Protective gear

The most common items of protective gear owned by active riders were helmets (99%); and gloves (98%). The vast majority of active riders also said they owned a riding jacket (91%), riding boots (83%) or riding pants (73%). Two thirds of active riders (68%) owned a complete set of protective gear.

Respondents were most likely to own only one pair of motorcycle boots (46%) and most likely to own multiple pairs of gloves (67%) or more than one helmet (66%). Younger respondents or less experienced riders tended to own fewer items of protective clothing than older riders, although those with multiple sets of gear reported they had accumulated this over time through upgrading or replacing items. The most common reasons for not owning more gear was that it was expensive and not riding frequently enough to warrant more gear.

Regardless of ownership status, almost all respondents (96%) 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 70% of respondents and riding boots worn *all the time* by 61% of respondents. Of note, riding pants were worn much less frequently than other gear – only 42% wore riding pants every time they rode. In total, one in three (32%) active riders said they always wore a complete set of gear when they rode (i.e. they always wore both jacket and pants (or a one piece suit) with a helmet, gloves, and boots). A lack of ownership of any one of these items was a key factor in the relatively low proportion of respondents wearing a ‘full set’ of gear *all the time* (one in three (32%) did not own a complete set of protective gear). However, among those who did own a complete set of protective gear, only 44% wore all their gear every

time they rode. Those who did not wear their whole kit every time they rode were most likely to say it depended on the destination or length of the trip, or the weather.

As to future purchase intentions, half of respondents intended to purchase more gear in the next six months (52%) with those who already had a full set of gear more likely to say they planned to buy more in the near future and younger riders less likely to say so.

Attitudes towards speeding

When asked about their speeding behaviour, most said they would not ride over the speed limit even if they were sure they would not get caught with close to two-thirds (60%) *disagreeing strongly or somewhat* with the statement ‘I ride over the speed limit if I’m sure I’ll get away with it’, –

As to the speed they felt riders should be able to ride without being booked for speeding, two thirds nominated a speed limit of 60km or lower (67%). Regardless of the speed nominated, more than half (55%) said they would never ride above their nominated speed in a 60 km zone. However, when the same question was asked about 100km zones, fewer riders nominated a speed of 100km per hour or less (55%) and were also less likely to say they would never ride above the speed they nominated at least some of the time (41%).

Crash history

More than half (54%) of all respondents reported that they had experienced a crash while riding in the past. Male riders were more likely to have experienced a crash, as were riders aged 40+ (58% and 60% respectively). However, one in three respondents with under six years’ riding experience had also experienced a crash on their motorcycle (32%).

Forty-five percent (45%) of those who had experienced a crash said they had needed medical attention as a result. The majority of those who needed medical treatment for their most recent crash reported this had been more than 11 years ago (65%). With the rider population skewed towards older age groups, this suggests that crashes requiring medical treatment were more likely to happen in the earlier years of riding.

Most crashes requiring medical attention occurred on sealed roads in built-up locations (57%). Only 14% of incidents occurred on sealed roads in rural areas. Respondents were most likely to believe another party was at fault (46%) in their most recent crash requiring medical treatment. One in five believed they were personally at fault (21%). Around one in three (30%) respondents received compensation or income support as a result of injuries from a motorcycle crash – most (85%) had received this compensation from the TAC (12% of all those who had ever experienced a crash or 26% of those who had experienced a crash requiring medical treatment).

Implications of the research

Issues around protective gear arguably present the greatest challenge for the TAC. This research showed only two thirds (68%) of active riders owned a ‘complete set’ of protective gear and only 42% of riders wore riding pants every time they rode. The fact that the inconvenience of changing clothing to ride if the trip was short or the weather was fine was a key barrier to wearing protective gear for every ride also suggests that habits around wearing protective gear would be hard to break. Making protective gear compulsory for riders could be one way to ‘encourage’ desirable behaviour. However, a range of policy tools, both regulatory and non-

regulatory, are more likely to be effective in encouraging behaviour change.¹ Messaging around the idea of protective gear being an extension of the motorcycle and riding experience itself may be one way to communicate to riders that wearing protective gear should be considered as a necessary ritual every time you ride. However, a better understanding of the mindset of riders and what would change their minds about protective gear would help in the development of strategies to address this important issue.

Due to the substantial proportion of 'lapsed' riders who had not completely ruled out riding again in the future, further research among people who have recently taken up riding again may also help to provide more insight into this group and determine whether interventions are required including whether there are any common skill or knowledge gaps among returning riders. Additional research would also help to understand the likelihood of lapsed riders seriously taking up motorcycling again to gauge the scale of this issue and whether this is a growing concern or if 'lapsed' riders are merely reluctant to let go the idea of riding again in the future.

Lastly, motorcyclists were more likely to say they would adhere to speed limits in a 60km zone than in 100km zones. Based on other TAC research, these results were not dissimilar to drivers' attitudes to speed. However, it is a concern that road users in general were more likely to say they would speed in higher speed limit zones if the opportunity presented itself. With changes being introduced to simplify to speed limits in Victoria in coming years², there is an opportunity to include communications on following distances and adjusting for reaction times at different speed limit zones aimed at all road users, not just motorcyclists, as part of any education campaigns associated with these upcoming changes.

¹ House of Lords Science and Technology Select Committee, (2011), '*Behaviour Change*', available from <http://www.publications.parliament.uk/pa/ld201012/ldselect/ldscitech/179/179.pdf> cited in Ipsos Social Research Institute (2011), *Acceptable behaviour? Public Opinion on Behaviour Change Policy* – available from <http://www.ipsos-mori.com/researchpublications/publications/1454/Acceptable-Behaviour.aspx>

² ABC News, Victoria to simplify speed limit zones (14 August 2012), Accessed 17 August 2012, Available at: <http://www.abc.net.au/news/2012-08-14/victoria-to-lower-speed-limits/4197104>