

TAC Motorcycle Tracker

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Sweeney Ref. Number: 18680



Background

This report details the findings of a new tracking study for the Transport Accident Commission which focuses on Victorian motorcycle/motor-scooter riders.

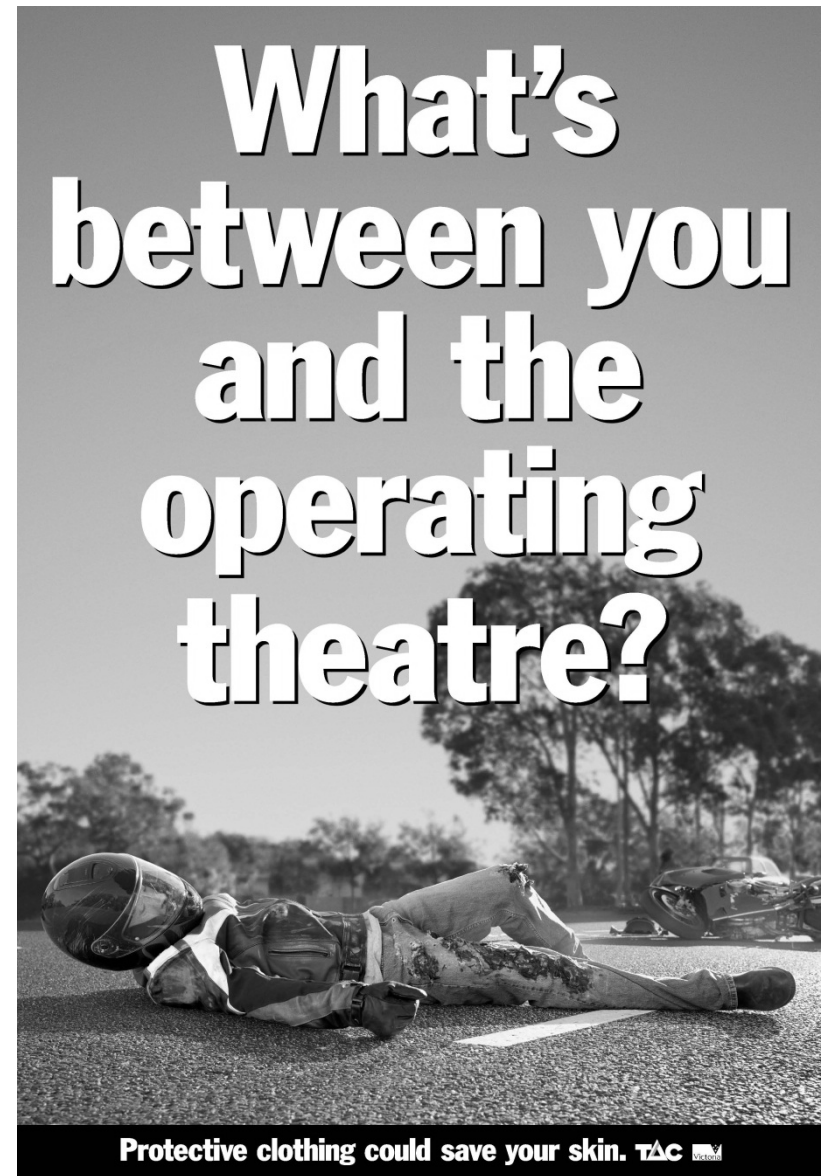
This tracking study runs alongside and is complimentary to the main tracking project conducted with Victorian motorists.

Telephone interviews are conducted with 50 motorcycle/motor-scooter riders every Thursday.

The questionnaire has been designed to measure:

- Behaviour and attitudes to specific road safety issues
- Prompted recall of motorcycle campaigns (when on air) including...
 - Message take-out of the campaigns
 - Personal relationship with these campaigns
 - Behavioural changes as a result of these campaigns

Comparisons have been made between the motorcyclist tracking data and the overall motorist tracking data where relevant. Data from the main motorist tracker is referred to as *General Motorist Population* in this report.



Sample Profile

Sample for this survey is provided by VicRoads from a database of motorcycle licence holders.

Weekly age quotas are applied to ensure a 50:50 ratio of those aged 18 to 39 years and those aged 40+ years.

The sample profile is shown opposite.

Total	
Gender	
Male	1615
Female	140
Age	
18 to 39 years	875
40+ years	880
Location	
Melbourne Metro	886
Regional Victoria	867
Type of Motorcycle licence	
Learner/Probationary Permit	86
Full Licence	1669
Total	1755



Key Findings

- **Recreational riding constitutes the largest proportion of riding time**
 - On average, more than two thirds of riding time is made up of on-road recreational riding (49%) and off-road recreational riding (20%). The remaining 31% of riding time is spent commuting
- **One third of motorcyclists (34%) have been involved in an incident when riding that required medical treatment**
 - Females are significantly less likely to have been involved in a motorcycle incident (21%)
- **Approximately 1 in 5 riders are aware of the SPOKES website and one third of those aware (34%) have visited the website**
- **Only 1 in 5 riders (21%) are members of a motorcycle club or association**
 - Ulysses shows the highest level of patronage - 23% of riders who are members of a club or association are aligned with Ulysses
 - 2% of all riders are members of the Motorcycle Riders Association (MRA)
 - Around 1 in 5 riders interviewed have participated in a motorcycling web forum and around half of motorcyclist attend motorcycling events
- **Recall of 'The Ride' TVC is high amongst motorcyclists (76% recall seeing the ad vs. 50% in the general population)**
- **The proportion of motorcyclists claiming to 'never' speed is considerably higher than the general population average (24% vs. 14% respectively)**
 - The incidence of speeding all/most of the time is largely consistent for both motorcyclists and general motorists (14% and 11% respectively)
- **Compared with the general motorist population, motorcyclists are less likely to have been caught for speeding in the last 2 years**
 - 14% of motorcyclists report being caught for speeding in the last 2 years compared with 29% for the general motorist population



Key Findings

- **Exposure to drink drive/ride enforcement is also lower amongst motorcyclists**
 - 84% of the general motorist population have seen drink drive/ride enforcement in the last 3 months compared with 42% of motorcyclists
 - There are also fewer motorcyclists who report being breath tested in last 3 months (31% vs. 45% for the general motorist population)
- **Ownership and usage of motorcycle jackets and gloves is high**
 - More than 9 in 10 own these items of protective clothing and approximately 4 in 5 claim to wear them all the time when riding
 - Riders are less likely to own motorcycle boots and pants (especially female riders) and the frequency of wearing these items is lower – only half report wearing pants all of the time when riding and 6 in 10 for motorcycle boots
 - Approximately 1 in 10 riders report never wearing motorcycle boots and pants
 - Pants are the least owned and least worn item of protective clothing (86% of riders owning pants and 53% of riders wearing pants all of the time).
- **Retailers are the main channel for information about protective clothing**
 - More than half of riders (53%) would seek this information from a retailer
 - The internet is also a common source of information about protective clothing (42% would access information via the internet)



Section 1: Motorcycle Usage



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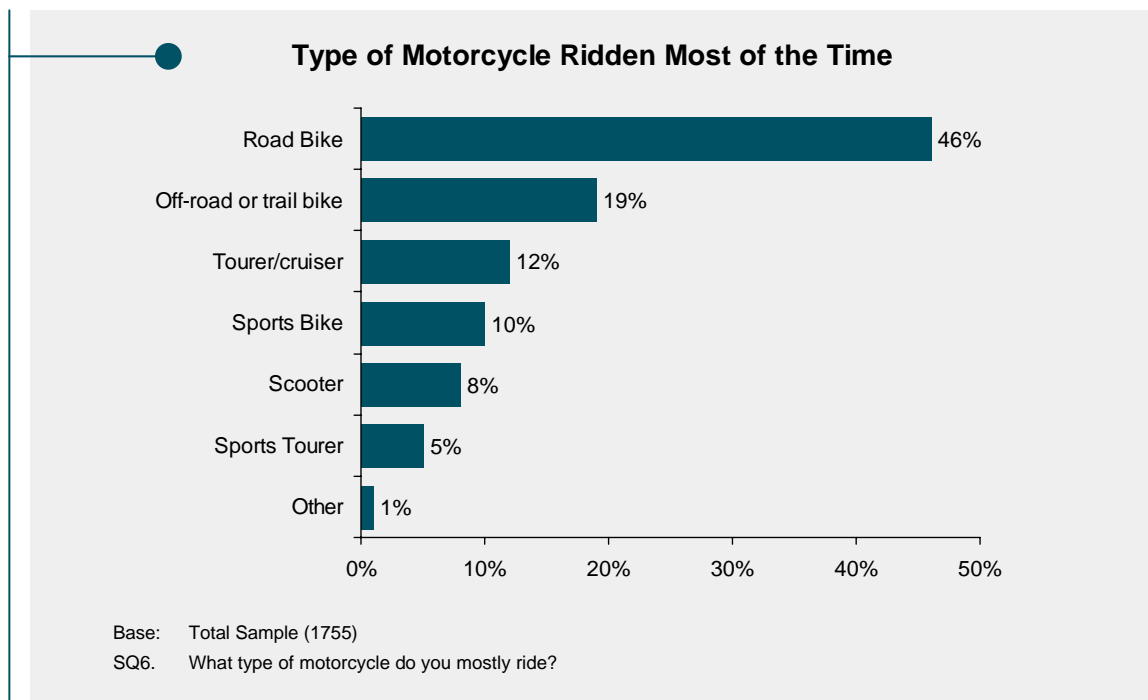


SWEENEY RESEARCH

Transport Accident Commission – Motorcycle Tracking

Type of Motorcycle

- Road bikes are the most common type of motorcycle ridden with 46% of respondents riding this type of bike most of the time.
- Off-road or trail bikes are ridden by approximately 1 in 5 (19%). This type of bike is mainly ridden by males (20% vs. 7% for females).
- Females are more likely than males to ride scooters (25% vs. 6% respectively).



Type of Motorcycle

- Ownership of off-road or trail bikes is notably higher in regional Victoria – 24% vs. 14% in metropolitan Melbourne.
- Riders aged 40+ years are significantly more likely to own a tourer/cruiser bike – 16% vs. 7% for those aged 18-39 years.
- Females are more likely than males to ride scooters (25% vs. 6% respectively), while males are more likely to ride Off-Road/Trailer bikes (20% vs. 7% of females).
- 18-39 year old riders are also more likely to own Sports bikes than their older counterparts (14% vs. 5% respectively)

Type of Motorcycle – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Road Bike	46	46	44	43	49	43	49	44	48	50	54	27
Off-road or trail bike	19	20	7	23	15	24	16	14	24	6	7	58
Tourer/cruiser	12	11	14	7	16	7	16	11	12	12	15	4
Sports bike	10	10	6	14	5	15	5	13	6	12	11	6
Sports Tourer	5	5	2	4	6	4	6	6	4	6	6	3
Scooter	8	6	25	8	8	6	6	12	3	13	6	1
Other	1	2	1	1	2	1	2	1	2	2	1	2

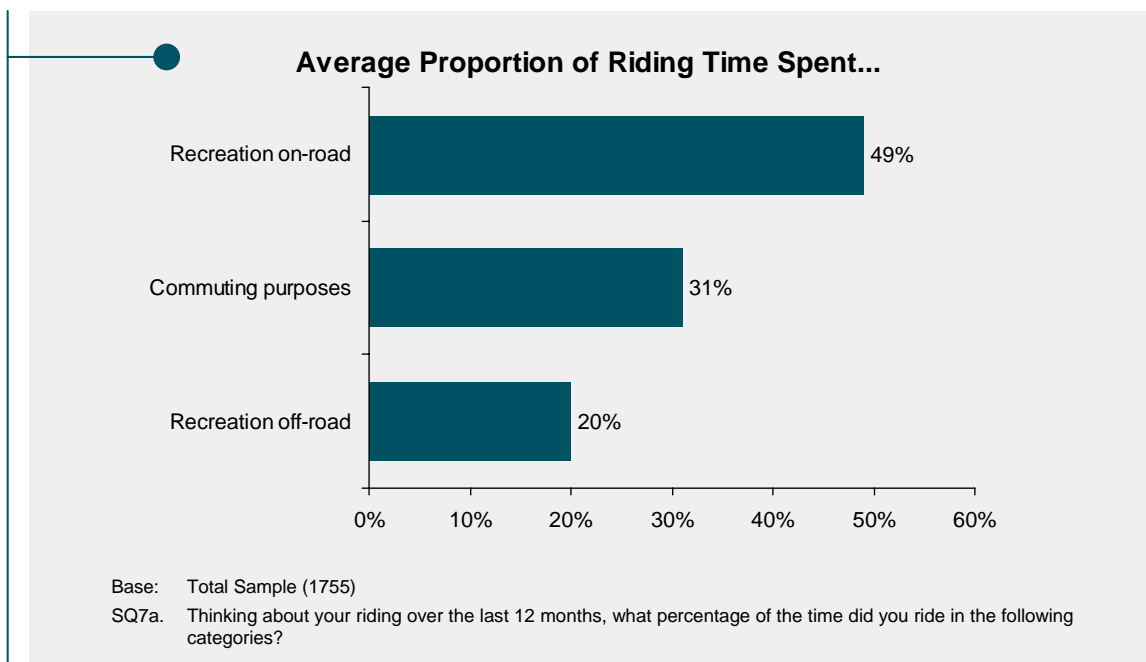
Base: Total Sample (1755)

SQ6. What type of motorcycle do you mostly ride?



Type of Riding

- Recreation riding on-road constitutes the largest proportion of riding time for motorcyclists (49%) followed by commuting (31%).
- Approximately one fifth of riding time is spent off-road for recreation purposes.
- Younger riders aged 18-29 years spend more time riding for commuting purposes (35% of riding time) than those aged 40+ years (28% of riding time).
- The proportion of time spent doing off-road recreation riding is greater for males (21% vs. 6% for females), younger males (25% vs. 18% for males aged 40+ years) and riders in regional Victoria (24% vs. 17% for metro riders).



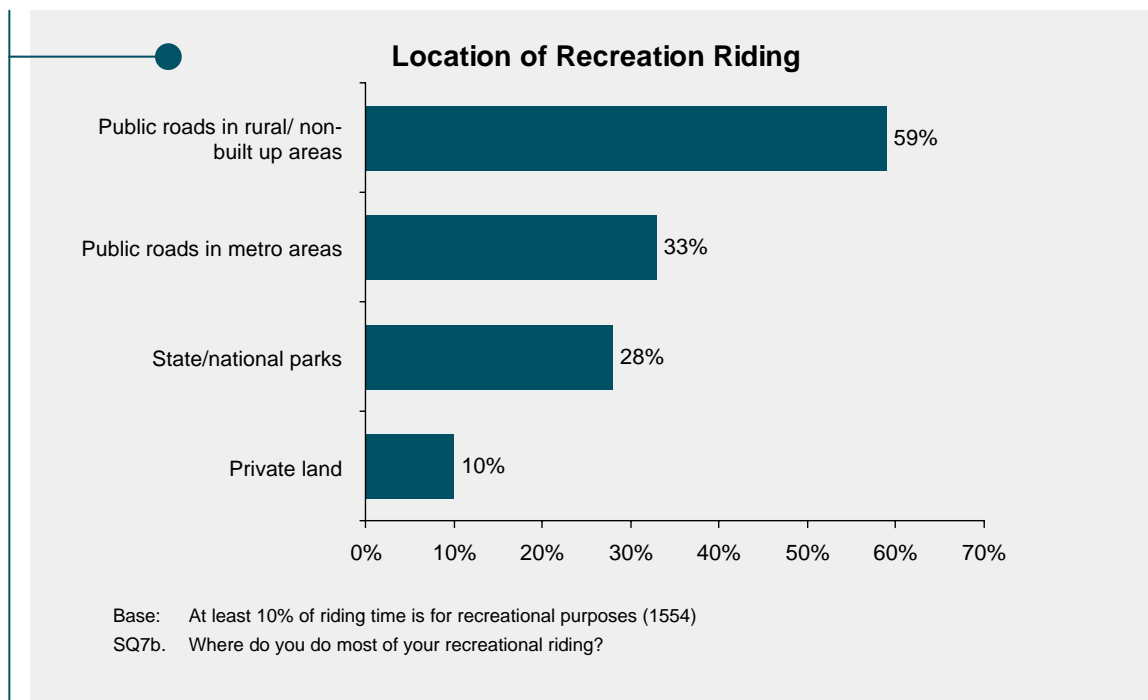
Type of Riding – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Recreation on-road	49	48	54	41	56	41	55	44	53	33	66	23
Commuting purposes	32	31	40	35	28	34	27	40	23	62	25	12
Recreation off-road	20	21	6	24	16	25	18	17	24	51	10	66

Base: Total Sample (1755)
SQ7a. Thinking about your riding over the last 12 months, what percentage of the time did you ride in the following categories?



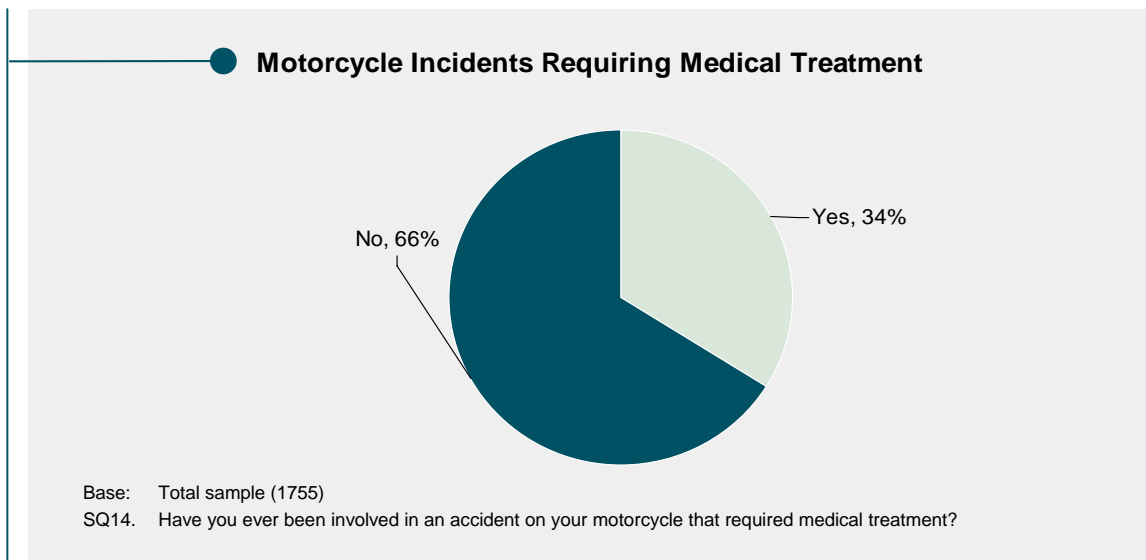
Location of Recreation Riding

- Recreation riding is mainly undertaken on public roads in rural/non-built up areas.
- Some recreation riding is also done on public roads in metro areas and in state and national parks.
- Only 1 in 10 undertake recreational riding on private land (10%).



Proportion of Motorcycle Riders Involved in Incidents

- Approximately 1 in 3 motorcyclists have been involved in an incident requiring medical treatment.
- Males are more likely than females to have been involved in a motorcycle incident requiring medical treatment (35% vs. 21% for females).
- Riders who participate in off-road recreation riding also show a higher incidence of being involved in motorcycle incidents (41% vs. 34% for total sample).
- Riders aged 40+ years are also more likely to have been involved in an accident that required medical treatment - 39% vs 29% for 18-39 year old riders.



Proportion of Motorcycle Riders Involved in Incidents – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Involved in incident	34	35	21	29	39	30	40	34	34	34	34	41
Not involved in incident	66	65	79	71	61	70	60	66	66	6	66	59

Base: Total sample (1755)
SQ14. Have you ever been involved in an accident on your motorcycle that required medical treatment?



Section 2: Communication

What's between you and the operating theatre?



Protective clothing could save your skin. TAC

Speed is the biggest killer of motorcyclists.



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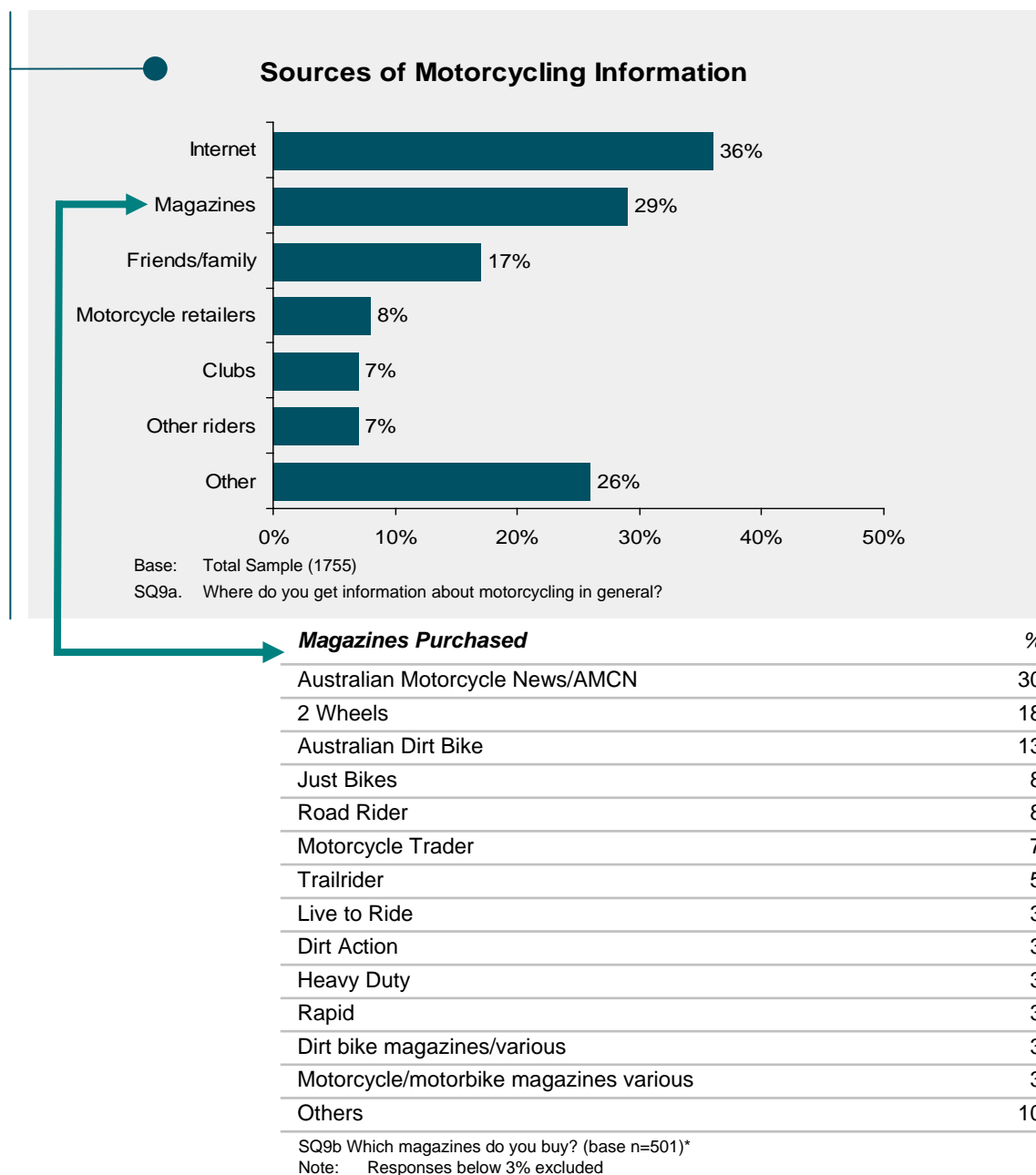


SWEENEY RESEARCH

Transport Accident Commission – Motorcycle Tracking

Information Sources

- The internet is cited as the most common source of information about motorcycling (36% of riders obtain information from the internet).
- Magazines and family/friends are also common sources of information.
- Australian Motorcycle News is the most commonly purchased motorcycle magazine – purchased by around 1 in 3 riders; followed by 2 Wheels and Australian Dirt Bike (18% and 13% respectively).



Information Sources

- The internet is a key source of information for a large proportion of riders however, it is more likely to be used by those aged 18-39 years (46%), females (46%), riders in metro areas (45%) and commuters (43%).
- Females are less likely than males to use magazines as a source of motorcycling information (16% vs. 30% respectively).
- Riders aged 18-39 years are less likely than those aged 40+ years to use motorcycle clubs as a source of information about general motorcycle information (3% vs.10% respectively).

Information Sources – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Internet	36	35	46	46	27	45	26	45	27	43	36	32
Magazines	29	30	16	24	33	25	34	24	33	27	30	34
Friends/family	17	16	22	20	13	20	13	16	18	17	17	19
Motorcycle retailers	8	8	5	9	6	10	6	8	7	6	8	7
Clubs	7	7	6	3	10	3	10	6	7	6	8	7
Other riders	7	7	6	6	8	7	8	7	7	7	7	8
Other	26	25	29	21	30	21	30	24	28	24	24	24

Base: Total Sample (1755)

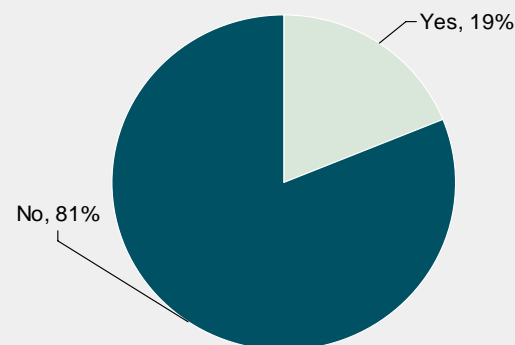
SQ9a. Where do you get information about motorcycling in general?



Awareness of SPOKES Website

- Around 1 in 5 motorcyclists (19%) are aware of the SPOKES website.
- Awareness of the website is more prevalent amongst females (24% aware vs. 19% for males) and in metropolitan areas (23% awareness vs. 16% for regional motorcyclists).

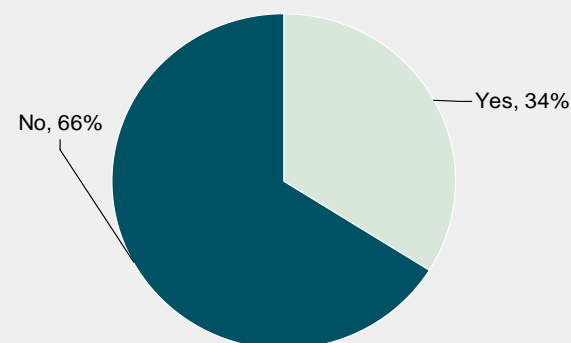
Awareness of SPOKES website



Base: Total sample (1755)
SQ10a Are you aware of the SPOKES website?

- Of those aware, approximately 1 in 3 (34%) have visited the website.

SPOKES Website Usage

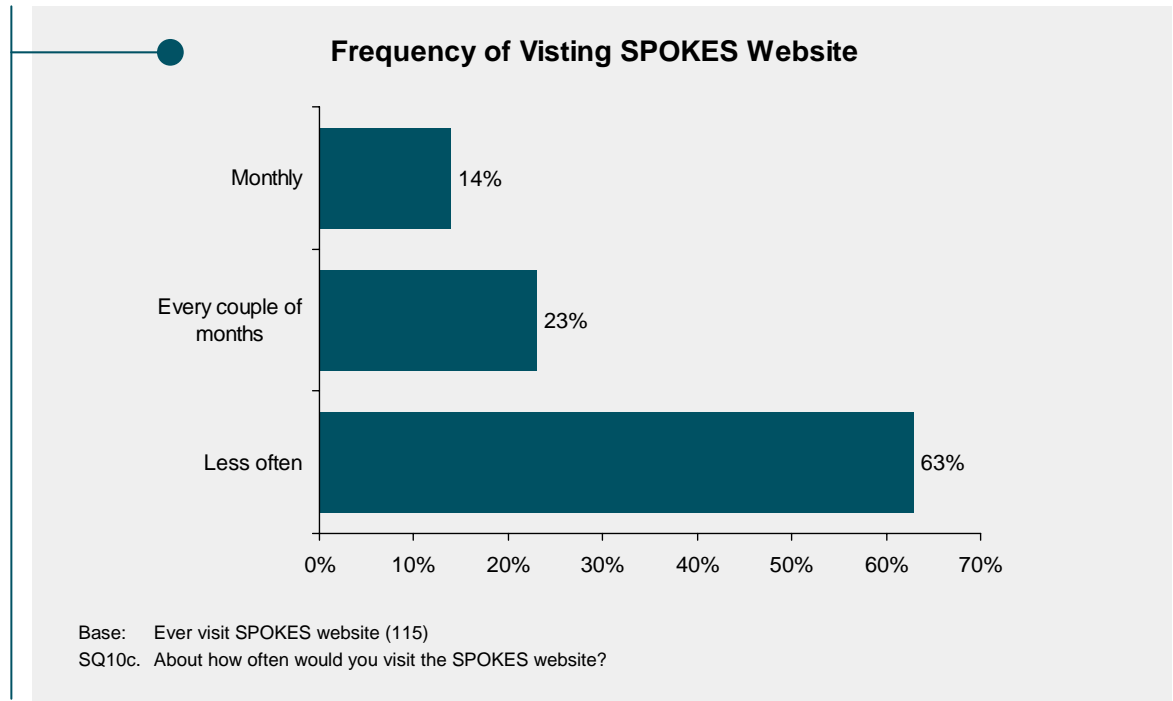


Base: Aware of SPOKES website (342)
SQ10b. Do you visit the SPOKES website?



Frequency of Visiting SPOKES Website

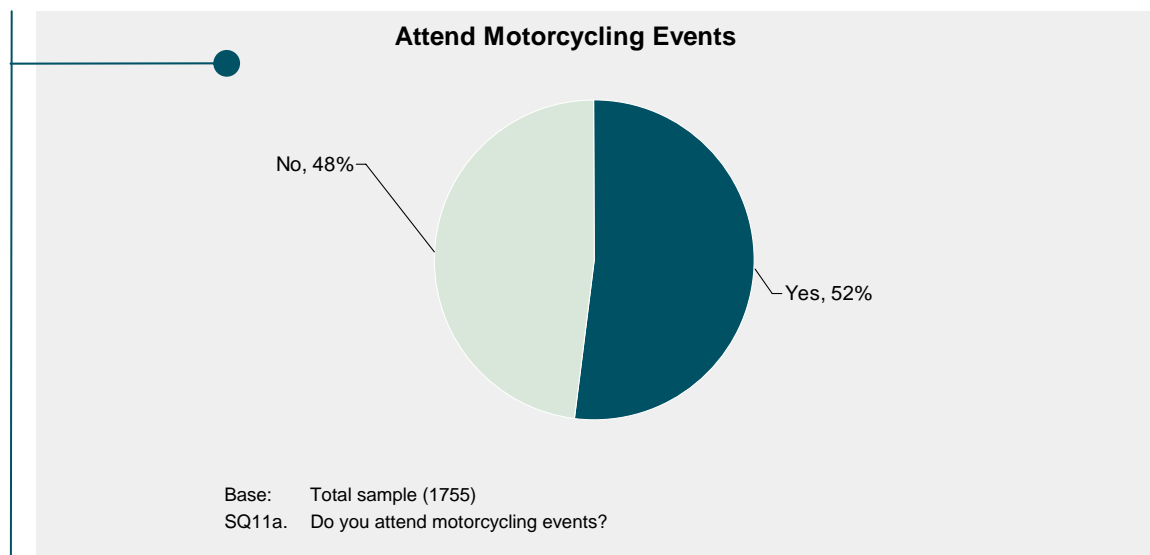
- Of those aware of the website, 14% are frequent users (visit website monthly) and 1 in 4 visit every couple of months.
- The majority (63%) of those aware of the SPOKES website visit the site less than once every couple of months.



Motorcycling Event Attendance

- Approximately half of motorcyclists attend motorcycling events.
- More males (53%) attend such events than females (41%).

- The Grand Prix is the most popular event for attendance with almost half of riders attending.
- Other events attended include Super Bikes and local/club events.



Events Attended	%
Phillip Island Grand Prix/ Australian Grand Prix/Moto GP	45
Super Bikes/World Super Bikes/Vic/Aus	19
Club rides/Events/Ride Days	13
Motorcycle Expo/Bike Shows/Swap Meets	11
Rallies	9
Motocross/Trials	7
Racing	6
Classic/Historic events	5
Club Meetings/Social Events	5
Charity Runs/Community	5
Toy Run	4
Off Road Racing/Dirt Bike Racing	4
Supercross	3
Local events	3
Track days at Phillip Island	3
Others	6

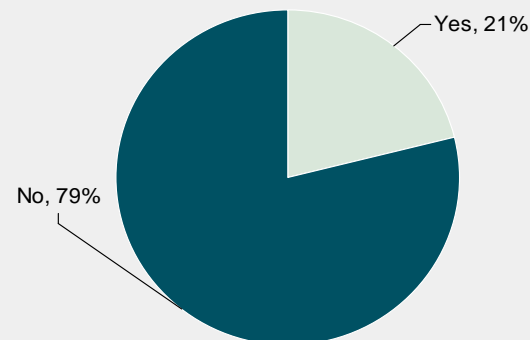
SQ11b Which events do you attend? (base n=910)*
Note: Responses below 3% excluded



Motorcycle Club/Association Membership

- Approximately 1 in 5 motorcyclists are current members of a motorcycle club or association.

Member of Motorcycle Club or Association

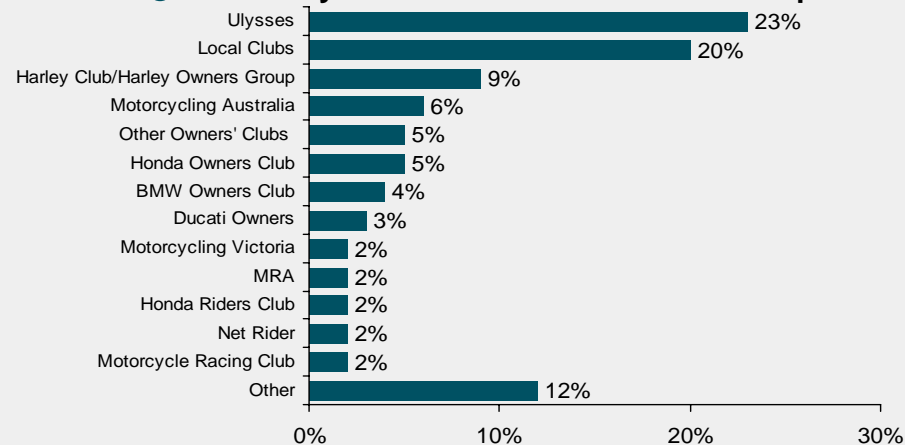


Base: Total sample (1755)

SQ12a. Do you currently belong to a motorcycle club or association?

- The most common club membership is with Ulysses.
- There is very little patronage of the Motorcycle Riders Association (MRA) – 2% of those who are members of any club are aligned with MRA – representing less than 1% of all motorcyclists.
- Other clubs or associations mentioned consist primarily of local clubs (i.e. Williamstown Motorcycle Club, Sandringham Motorcycle Club, Preston Motorcycle Club, etc).

Motorcycle Club/Association Membership



Base: Motorcycle Club/Association Members (363)

SQ12b. Which club/association do you belong to?



Motorcycle Club/Association Membership

- Motorcycle club membership is more prevalent amongst riders aged 40+ years (26% vs. 15% for those aged 18-39 years).
- Membership is also more popular in regional areas compared to Metro Melbourne (23% vs. 19% respectively).

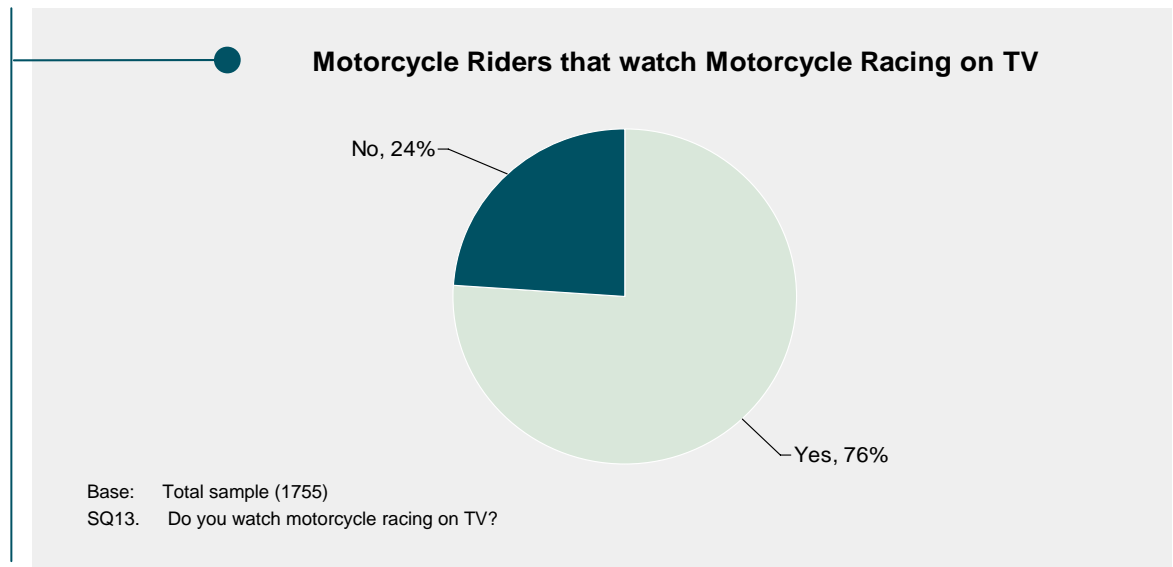
Motorcycle Club/Association Membership – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Member	21	21	19	15	26	15	26	19	23	19	23	19
Non-Member	79	79	81	85	74	85	74	81	77	81	77	81

Base: Total sample (1755)
SQ12a. Do you currently belong to a motorcycle club or association?



Proportion of Motorcycle Riders that watch Motorcycle Racing on TV

- The majority of all motorcyclists interviewed watch motorcycle racing on TV (76%).
- Females are less likely to watch Motorcycle Racing than males (62% vs. 78% respectively).
- TV viewing of motorcycle racing is also more prevalent amongst off-road riders (84%).

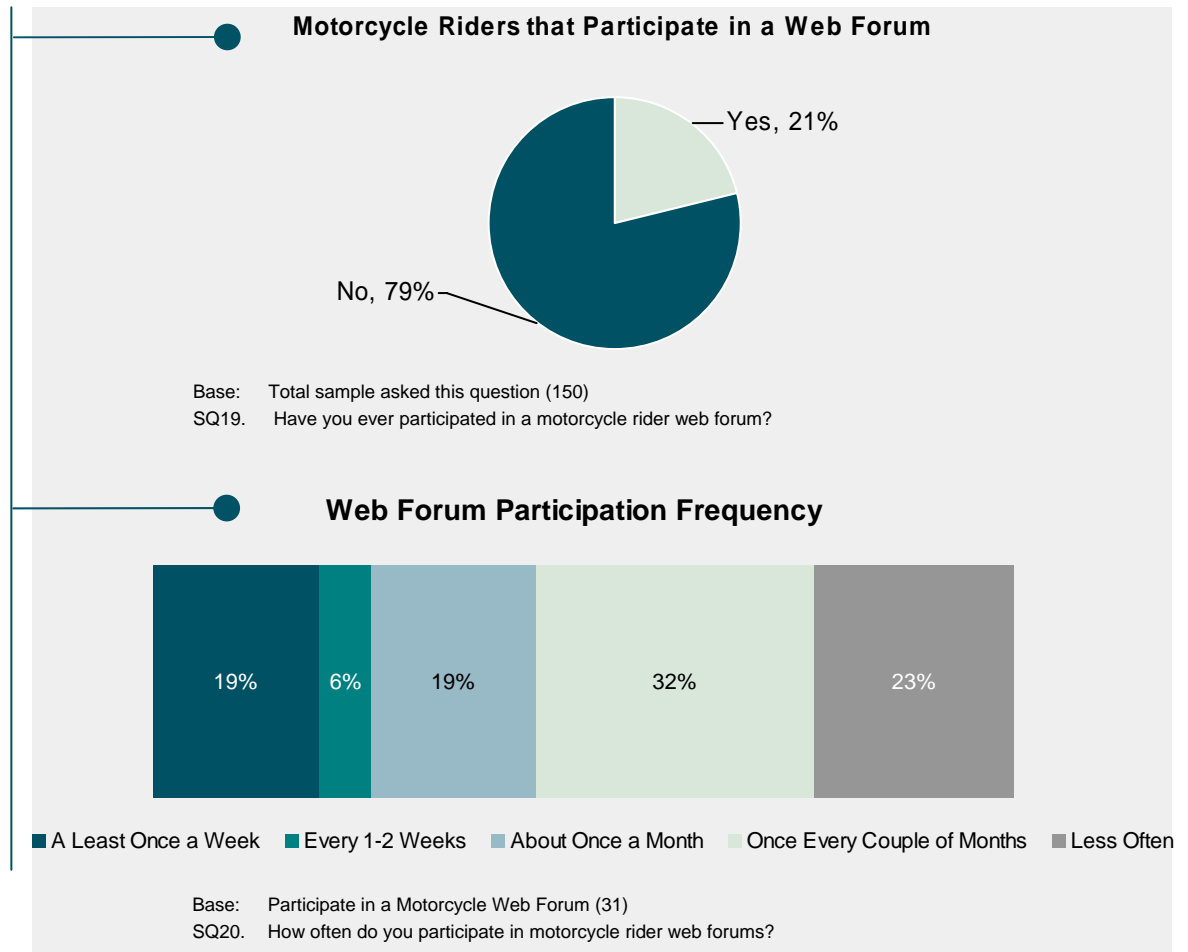


Proportion that watch Motorcycle Racing on TV – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Yes	76	78	62	77	76	78	78	74	79	75	78	84
No	24	22	38	23	24	22	22	26	21	25	22	16
Base: Total sample (1755) SQ13. Do you watch motorcycle racing on TV?												



Proportion of Riders that Participate in a Motorcycle Rider Web Forum

- Approximately 1 in 5 motorcyclists have participated in web forums.
- Riders aged 18-39 years are more likely to participate in forums than 40+ year old riders (25% vs. 16% respectively).
- Those in metro areas are also more likely to take part in an online forum than those living in regional areas (32 vs. 9% respectively).
- Of those who participate in motorcycle web forums, around 1 in 4 are participating regularly (at least once every two weeks). The majority are infrequent users, participating every couple of months or less often.



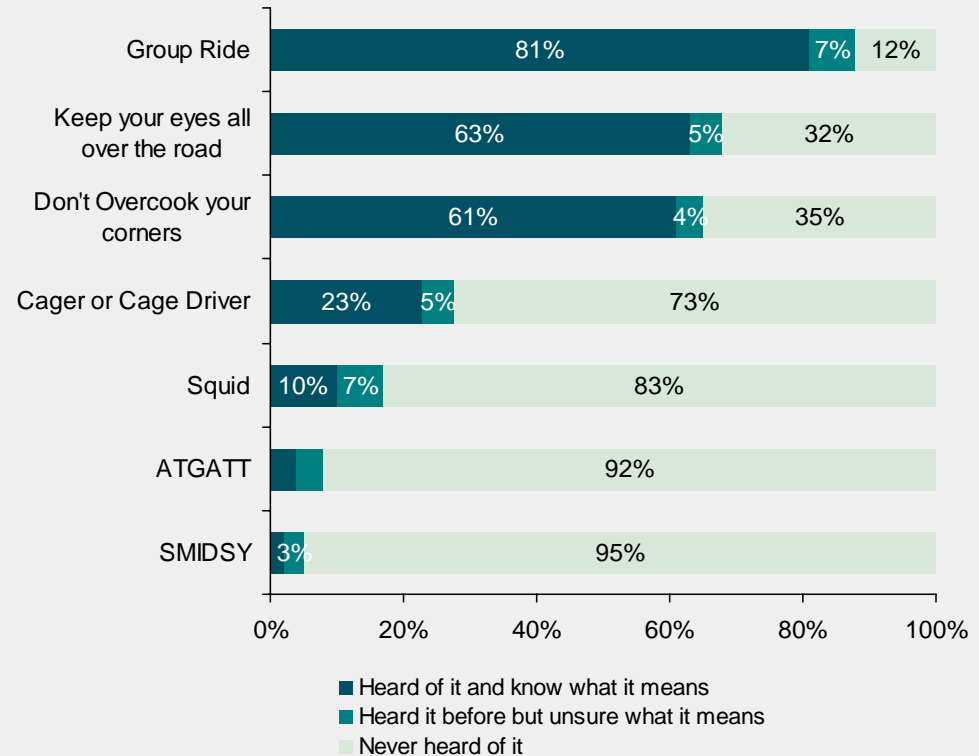
Proportion that participate in a Web Forum – By Key Demographics												
	Total (150) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (140) %	Female (10) %	18-39 (75) %	40+ (75) %	18-39 (67) %	40+ (73) %	Melb (76) %	Reg Vic (74) %	Commuter (79) %	On-Road (12) %	Off-Road (44) %
Yes	21	20	30	25	16	25	15	32	9	28	23	16
No	79	80	70	75	84	75	85	68	91	72	77	84

Base: Total sample asked this question (150)
SQ15. Have you ever participated in a motorcycle rider web forum?

Rider Familiarity with Motorcycling Terms and Expressions

- 'Group Ride' is the most widely recognised expression with around 4 in 5 having heard of it and know what it means.
- Approximately 6 in 10 have are familiar with the expressions 'Keep your eyes all over the road' and 'Don't overcook your corners'. However, approximately 1 in 3 riders have never heard of these expressions.
- The majority of riders have never heard of the terms 'Cager/Cage Driver', 'Squid', 'ATGATT' or 'SMIDSY'.

Rider Familiarity with some Motorcycling terms & Expressions



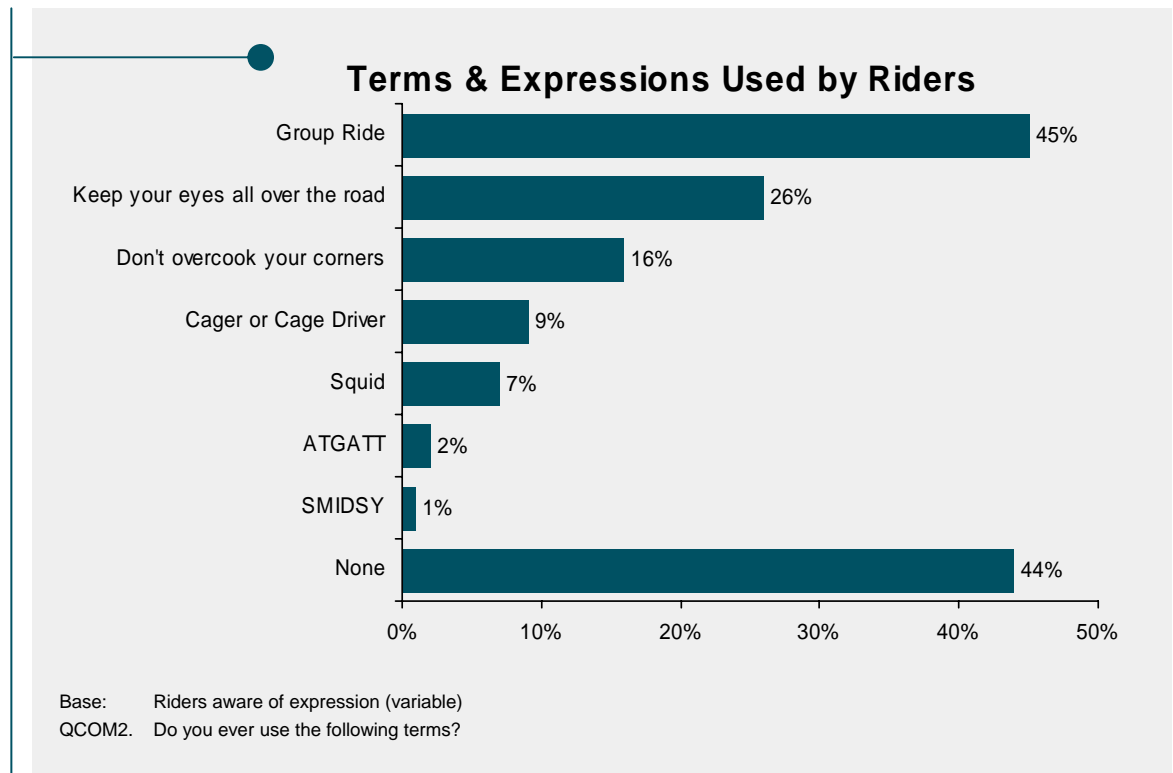
Base: Total Sample (150)

QCOM1. I am going to read out some terms that other motorcycle riders have used. For each term I read out can you please tell me which of the following best describes how familiar you are with the term...



Rider Use of Motorcycling Terms and Expressions

- More than 4 in 10 riders claim to never use any of the expressions evaluated.
- 'Group Ride' is the most popular expression used with more than 4 in 10 riders stating that they currently use this expression.
- 'Keep your eyes all over the road' and 'Don't overcook your corners' are used by some riders.
- A small minority use the expressions 'Cager/Cage Driver', 'Squid', 'ATGATT' or 'SMIDSY'.



Rider Interpretation and Understanding of Motorcycling Terms and Expressions

- There is a reasonable understanding of the meaning of 'Group Ride' 'Don't overcook your corners' and 'Keep your eyes all over the road'.
- Very few were able to correctly recall the meaning of 'SMIDSY', 'ATGATT', 'Squid' with more that 3 in 4 unsure of the meaning.
- There is some correct recall of the meaning of 'Cage Driver' however, more than half were unsure of the meaning.

'Don't overcook your corners' (65% heard of expression)

"Don't go too fast into a corner."
 "To take the right line in the corner and not take it too tight."
 "Your approach and exit from corners, don't go too fast."
 "Don't go around corners to quick."
 "Cutting the corners too fast."
 "A rider who approaches a corner too quickly and runs wide because they don't understand how to get around it."
 "Don't turn through corners with too much speed."

10% unsure what expression means

'Keep your eyes all over the road' (68% heard of expression)

"Be aware and look out."
 "Be aware of what's happening around you."
 "Scanning ahead all the time and watching for anything."
 "Being aware of other vehicles and other obstacles on the road."
 "Keep your eyes on the other people around you as well."
 "Being aware of all your surroundings when riding."
 "To just do quick scans in lots of different directions to make sure you are aware of any unknown risk."

5% unsure what expression means

'Group Ride' (88% heard of expression)

"Group of guys going for a ride."
 "Organised ride with large group or a few motorcyclists."
 "Riding with a group of people."
 "Get together with mates and go for ride."
 "Riding with an organised group e.g. touring or day ride."
 "When a number of people get together for a ride either as a group of friends or an organised club event."

3% unsure what expression means

'Cager or Cage Driver' (28% heard of expression)

"A driver who is in their own zone and not aware of things around them."
 "Motorbike rider locked in by cars."
 "Drivers that don't pay attention."
 "Bad car driver."
 "Driver not paying attention to the road."
 "A driver who is stuck in their vehicle and doesn't tend to look out doesn't have the perception of what's going on around them."

55% unsure what expression means

'Squid'

(17% heard of expression)

"When your bones are busted and its just your skin holding everything in, like a bag of jelly."
 "Locking up of the wheels , like skidding."
 "Someone who rides without protective gear."
 "Someone who is sporadic or moves around a lot on the road."
 "When you are wearing only a helmet and no other protective gear."
 "Getting smeared across the road in an accident with no protective gear."

75% unsure what expression means

'ATGATT'

(8% heard of expression)

"The gap around the bike on the road."
 "All the gear all the time."
 "Australian traffic group or something."
 "A big gap between cars."

87% unsure what expression means

'SMIDSY'

(5% heard of expression)

"A little bit over the speed limit."
 "Sorry mate i didn't see you."
 "Rear wheel lock up."
 "The bloke in front of you."

89% unsure what expression means

Base: Total Sample (150)

QCOM3. For each term I read out, can you please tell me what you think it means?



SWEENEY RESEARCH

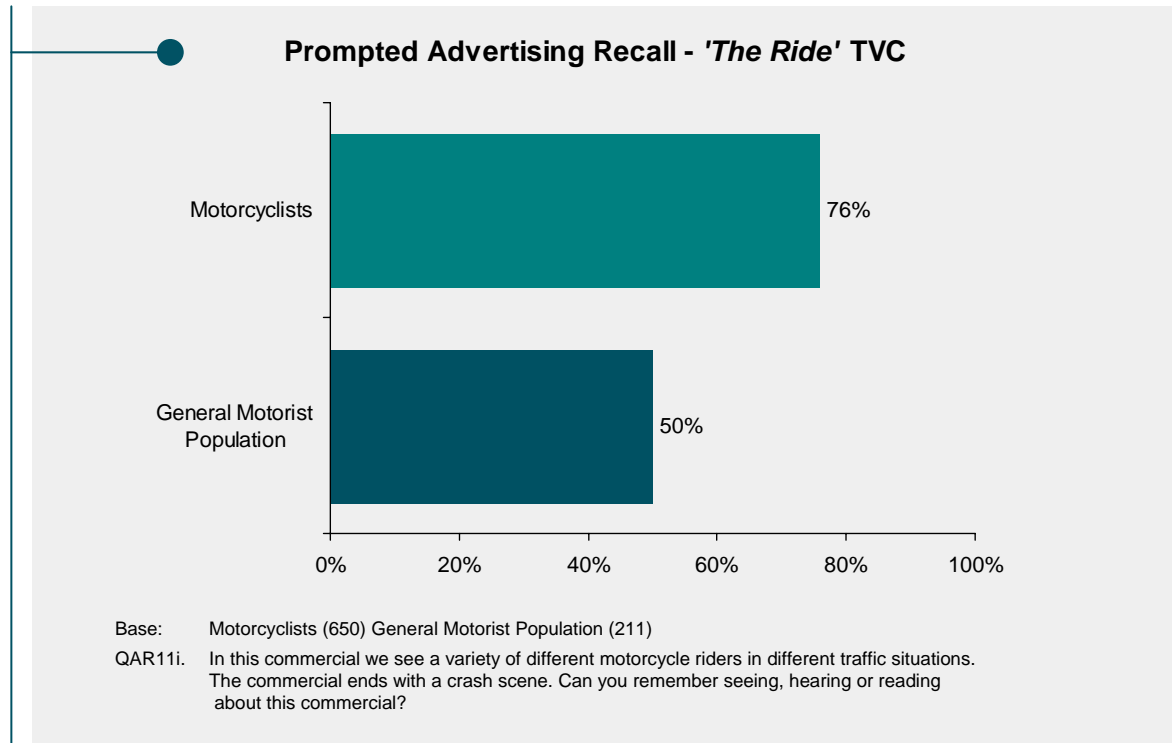
Transport Accident Commission – Motorcycle Tracking

Section 3: Advertising Recall



Prompted Advertising Recall – ‘The Ride’

- The motorcyclist campaign ‘The Ride’ receives strong recognition amongst motorcyclists – 76% recall seeing the advertisement.
- Recognition of the ad within the general population of motorists is also strong with half of respondents recalling having seen the ad.



Main Messages – ‘The Ride’

- The main message/s contained in this commercial, according to those who remember it, are listed in the table to the right.
- The main message take-out is associated with wearing protective clothing and taking care when riding a motorcycle or scooter.

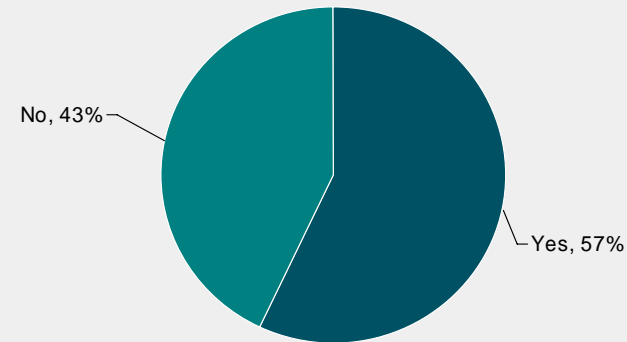
Main Messages of ‘Motorcyclist’ Advertising Campaign	
	%
Wear protective clothing	33
You need to be more careful when riding a motorcycle or scooter	19
Don't drive like a hoon/be responsible	8
Riding a motorcycle/scooter is dangerous	7
Be aware of bikes of the road	6
Don't speed/speeding is dangerous	4
Makes you aware of motorcycle safety	4
Chances of serious injury are much higher when riding a motorcycle/scooter	3
Every time you ride you need to wear protective gear	2
Watch out for cars	2
Other	1
Don't Know	5
Base: Recall ‘Motorcyclist’ advertising campaign (495)	
QAR11g. What was the main message of this commercial?	



Impact of 'The Ride' Advertising Campaign

- Of those who remember seeing the ad, 6 in 10 claim to have discussed the commercial with family or friends.

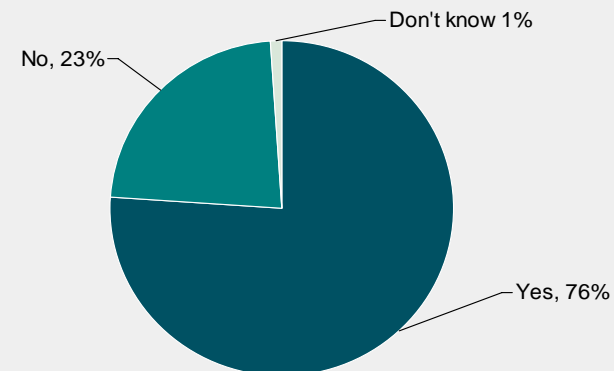
Discussed Ad with Family or Friends



Base: Recall 'Motorcyclist' advertising campaign (495)
QAR11h. Have you talked about this commercial with your family or friends?

- The majority of those who recall seeing the ad believe they personally relate to the advertising i.e. the message is speaking to them.

Is the advertising talking to people like yourself?



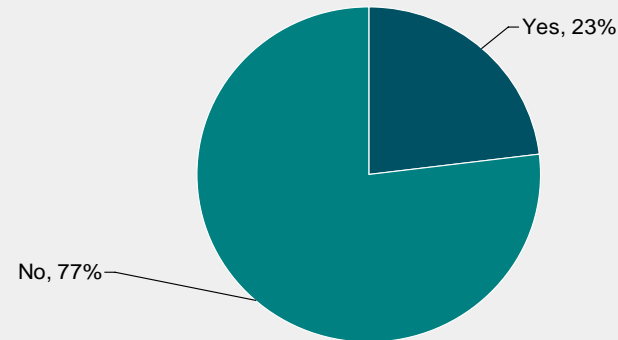
Base: Recall 'Motorcyclist' advertising campaign (495)
QAR12a. Do you think this advertising is talking to people like yourself?



Impact of 'The Ride' Advertising Campaign

- We asked those who recall the 'The Ride' ad to indicate whether they have changed their riding behaviour as a result of seeing the ad – approximately 1 in 4 claim to have changed their behaviour.

● Changed Riding Behaviour After Seeing 'Motorcyclist' Advertising

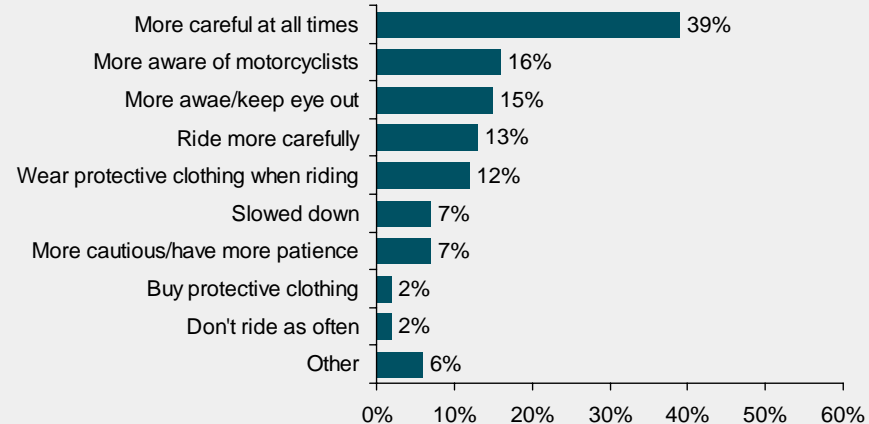


Base: Recall 'Motorcyclist' advertising campaign (495)

QAR12c As a result of seeing, hearing or reading about this advertising, have you changed your behaviour in any way?

- The most common changes to riding behaviour after seeing the ad involved taking extra care and being conscious of motorcyclists on the road.

● Advertising Impact on Riding Behaviour



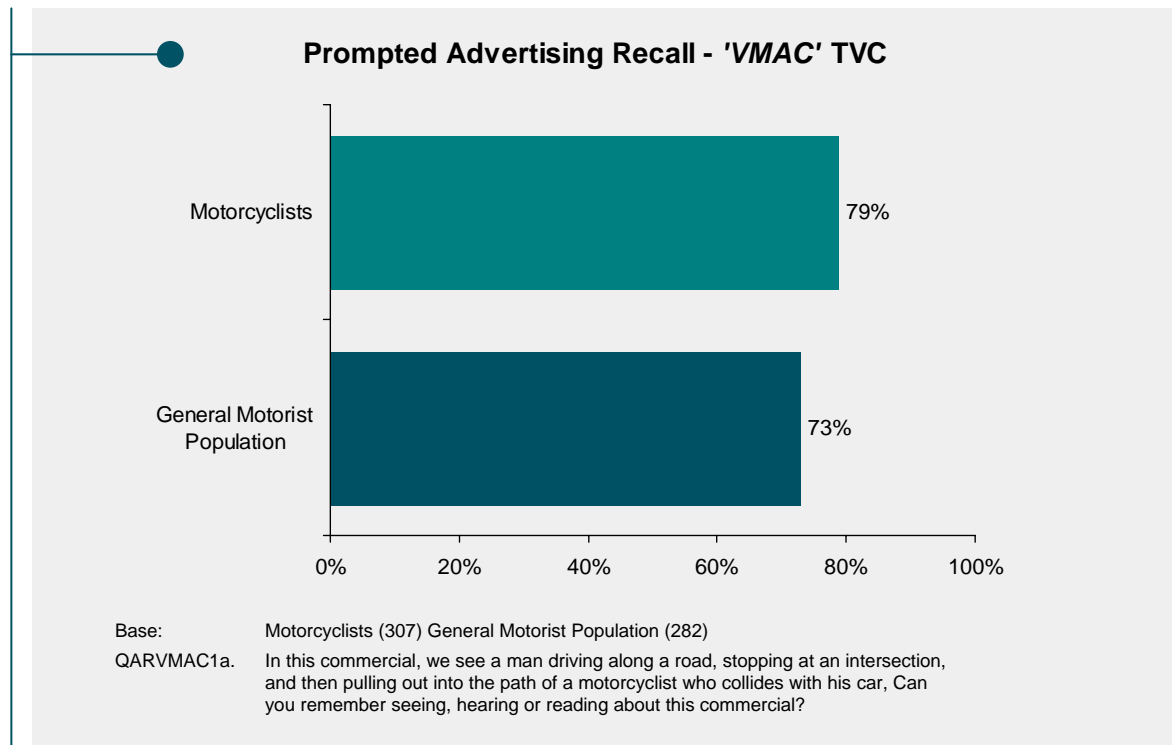
Base: Changed behaviour as a result of seeing 'Motorcyclist' advertising campaign (170)

QAR12d. In what ways did you change your behaviour?



Prompted Advertising Recall – 'VMAC'

- The motorcyclist campaign 'VMAC' also receives strong recognition amongst motorcyclists – 79% recall seeing the advertisement.
- More female riders (82%) recall the ad than males (79%)
- Recognition of the ad within the general population of motorists is also strong with around 3 in 4 having seen the ad.



Main Messages – 'VMAC'

- The main messages contained in this commercial, according to those who remember it, are listed in the table to the right.
- The main message take-out is associated with awareness and reduction/ elimination of speeding.

Main Messages of 'Motorcyclist' Advertising Campaign	
	%
Be aware of bikes of the road	19
Don't speed/speeding is dangerous	13
Be more aware /Be aware of what's going on around you	7
Makes you aware of vehicle blind spots/can't see	6
Look twice for riders	5
Watch out for cars	2
Motorcyclists need to be visible	1
Look left, look right, look bike	1
Drive carefully/don't drive like an idiot	1
Other	33
Don't Know	3
Base: Recall 'Motorcyclist' advertising campaign (243)	
QARVMAC1b. What was the main message of this commercial?	

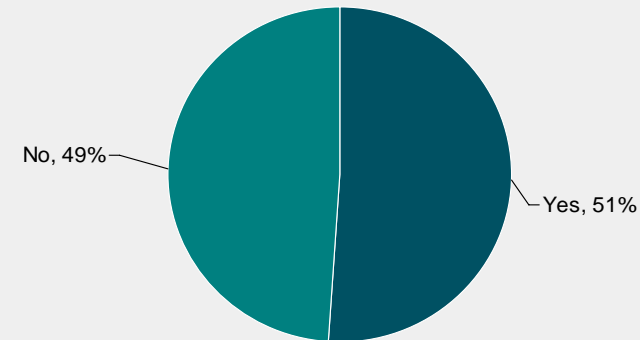
* Note: Coding of 'other specify' responses still being completed.



Impact of 'The VMAC' Advertising Campaign

- Of those who remember seeing the ad, a little over half (51%) claim to have discussed the commercial with family or friends.

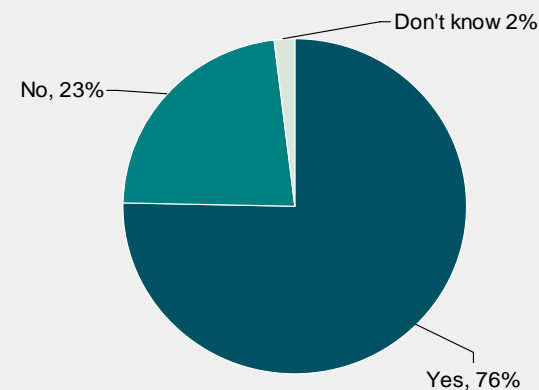
Discussed Ad with Family or Friends



Base: Recall 'Motorcyclist' advertising campaign (243)
QARVMAC2a. Have you talked about this commercial with your family or friends?

- The majority of those who recall seeing the ad believe they personally relate to the advertising i.e. the message is speaking to them.

Is the advertising talking to people like yourself?



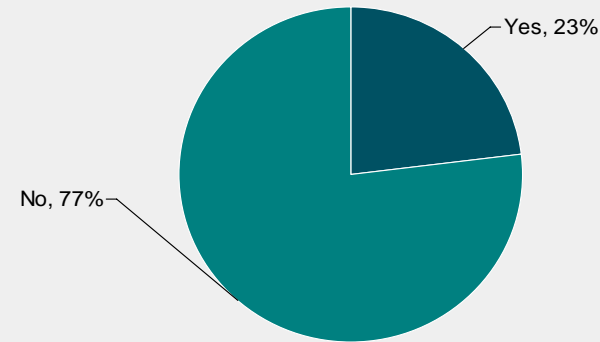
Base: Recall 'Motorcyclist' advertising campaign (243)
QARVMAC2b. Do you think this advertising is talking to people like yourself?



Impact of 'The VMAC' Advertising Campaign

- We asked those who recall the 'The VMAC' ad to indicate whether they have changed their riding behaviour as a result of seeing the ad – approximately 1 in 4 claim to have changed their behaviour.

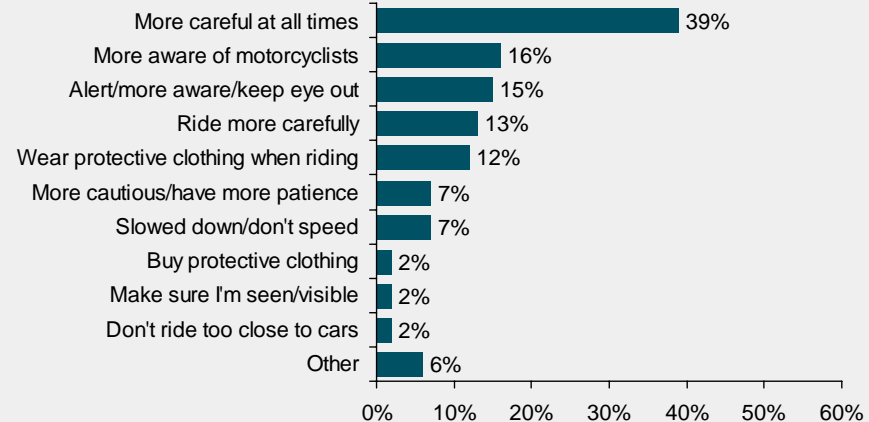
● Changed Riding Behaviour After Seeing 'Motorcyclist' Advertising



Base: Recall 'Motorcyclist' advertising campaign (243)
QARVMAC2d. As a result of seeing, hearing or reading about this advertising, have you changed your behaviour in any way?

- Consistent with the general motorist population, the most common changes to riding behaviour after seeing the ad involved taking extra care and being conscious of motorcyclists on the road.

● Advertising Impact on Riding Behaviour



Base: Changed behaviour as a result of seeing 'Motorcyclist' advertising campaign (170)
QARVMAC2e. In what ways did you change your behaviour?



Section 4: Speed – Attitudes and Behaviours



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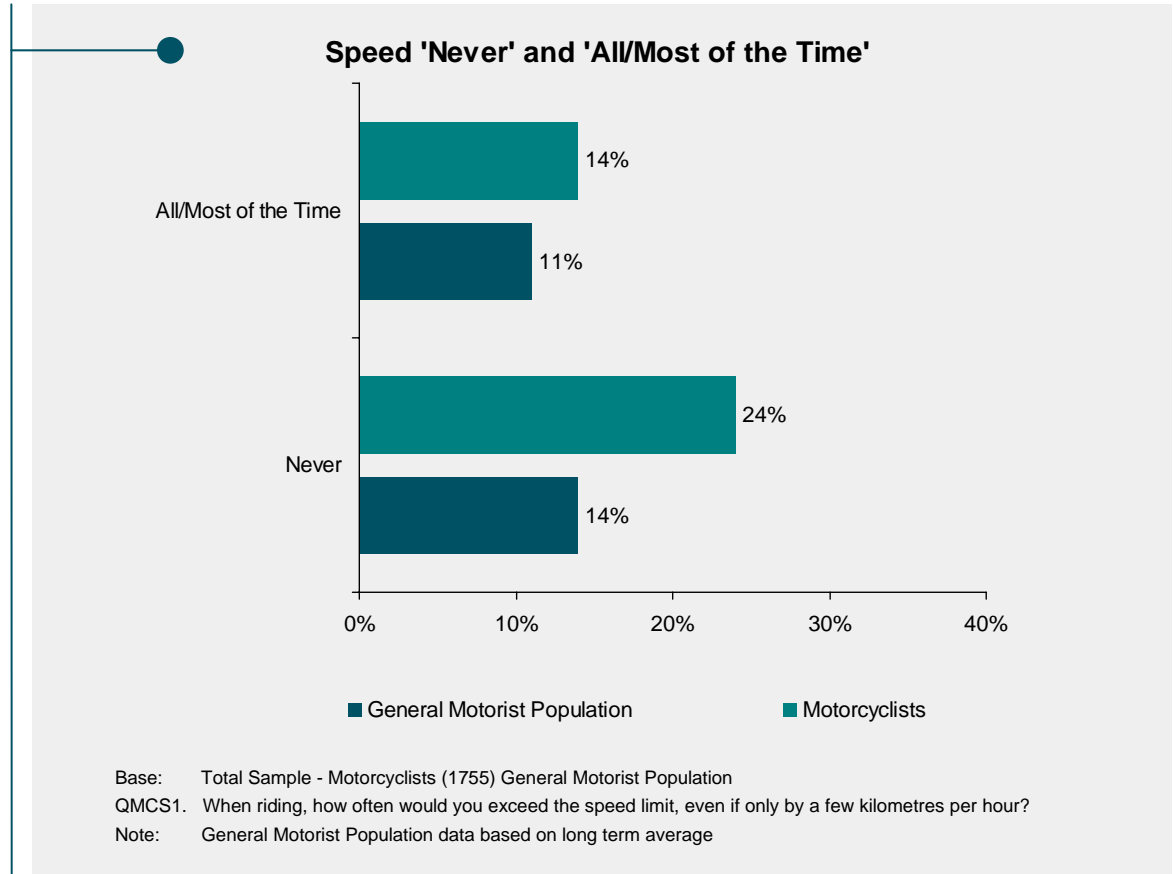


SWEENEY RESEARCH

Transport Accident Commission – Motorcycle Tracking

Self Reported Speeding

- The incidence of speeding all/most of the time amongst motorcyclists is slightly higher than for the general motorist population.
- Around 1 in 4 motorcyclists (24%) claim to 'never' speed which is significantly higher than the general motorist data (14% claim to never speed).
- The incidence of self reported speeding all/most of the time is fairly consistent across all segments, apart from females who show a noticeably lower incidence (4% vs. 14% for males). This is a consistent trend in the general population motorist tracking study.

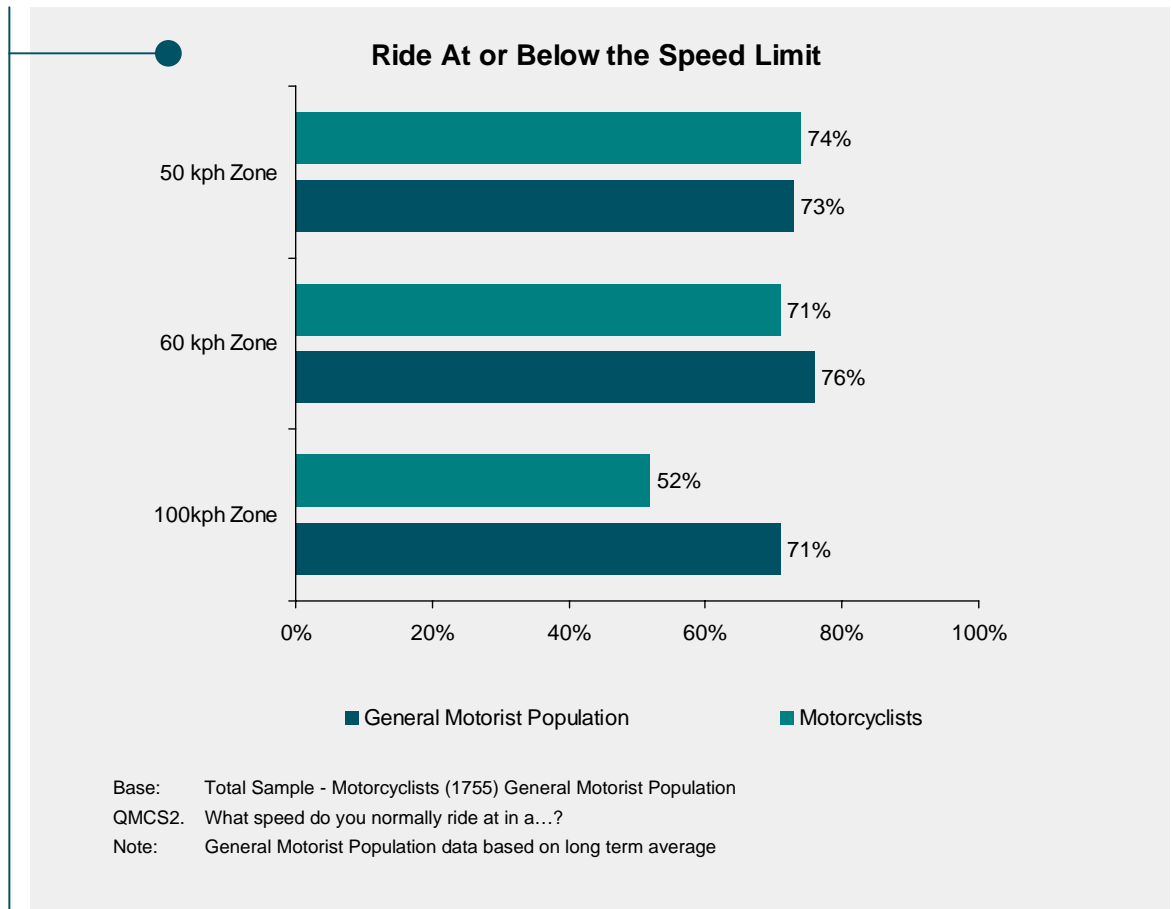


Self Reported Speeding – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
All/Most of the time	14	14	4	14	13	15	13	14	13	14	13	12
About half of the time	11	11	8	14	8	14	8	12	10	14	12	8
Some of the time	52	52	50	49	54	49	54	52	51	53	55	47
Never	24	23	38	23	26	22	24	23	26	19	19	32

Base: Total Sample - Motorcyclists (1755)
 QMCS1. When riding, how often would you exceed the speed limit, even if only by a few kilometres per hour?

Ride At or Below the Speed Limit

- The proportion of riders who claim to ride at or below the speed limit in 50kph and 60 kph zones is approximately 7 in 10. This is generally consistent with the general motorist population.
- Only half of motorcyclists indicate that they ride at or below the speed limit in a 100kph zone. This is significantly lower than the average for the general motorist population (71% claim to drive at or below the speed limit).
- Females are more likely than males to claim that they ride at or below the speed limit in all speed zones. This is a consistent trend with the general population motorist tracking study.
- Older riders (40+) are also more likely to claim that they ride at or below the speed limit in all the speed zones.

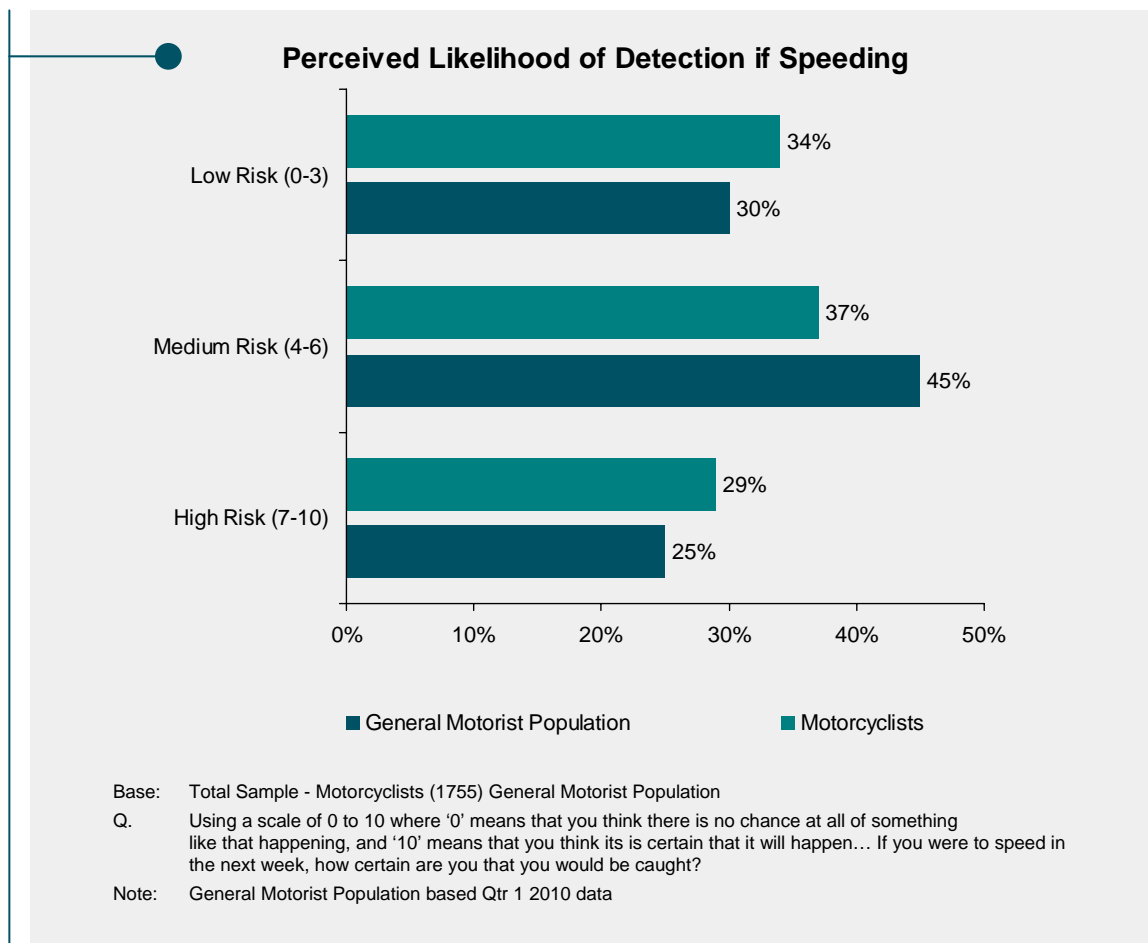


Ride at or below the speed limit – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
50 kph zone	74	73	84	69	79	68	78	68	79	72	77	69
60 kph zone	71	70	83	67	76	66	74	66	77	70	73	67
100 kph zone	52	51	65	51	53	50	52	54	49	51	49	57

Base: Total Sample - Motorcyclists (1755)
 QMCS2. What speed do you normally ride at in a...?

Perceived Likelihood of Detection if Speeding

- The proportion of motorcyclists who believe there is a low risk of being detected for speeding (34%) is indicatively higher than the general population average (30%).
- However, the proportion stating there is a high risk of detection is also greater than for the general motorist population. A greater proportion of motorists fall into the medium risk category.



Perceived Likelihood of Detection if Speeding

- The perceived likelihood of detection if relatively consistent across all segments.
- The proportion of motorcyclists in regional Victoria rating the risk of detection as high is marginally lower than for riders in metropolitan areas (28% vs. 31% for metro riders).

Perceived Likelihood of Detection if Speeding – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Low Risk (0-3)	34	34	36	36	32	36	32	34	34	37	33	34
Medium Risk (4-6)	37	37	35	36	38	35	38	35	38	33	37	35
High Risk (7-10)	29	29	29	28	30	29	30	31	28	30	30	32

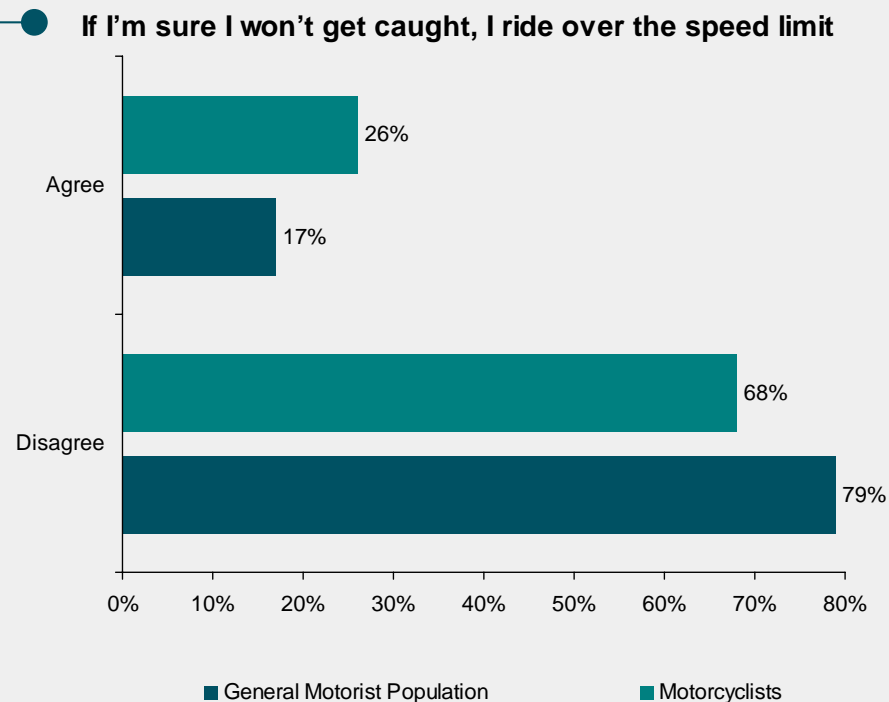
Base: Total Sample - Motorcyclists (1755)

Q. Using a scale of 0 to 10 where '0' means that you think there is no chance at all of something like that happening, and '10' means that you think its is certain that it will happen... If you were to speed in the next week, how certain are you that you would be caught?



Attitudes Towards Speeding

- Respondents were asked to indicate their level of agreement with the statement *'If I'm sure I won't get caught, I ride over the speed limit'*.
- Approximately 1 in 4 motorcyclists agree with this statement which is greater than for the general motorist population.



Base: Total Sample - Motorcyclists (1755) General Motorist Population

QMCS7. I am going to read out a statement other people have made about riding and speeding. Can you tell me whether you agree or disagree with the statement by answering agree strongly, agree partly, neither agree nor disagree, disagree partly or disagree strongly.

Note: General Motorist Population based Qtr 1 2010 data



Attitudes Towards Speeding

- Females show noticeably lower agreement (a desirable attitude) than males with the statement 'If I'm sure I won't get caught, I ride over the speed limit' (14% vs. 28% respectively).
- Males aged 18-39 years show the highest agreement with this statement – 30% agree strongly or a little.

If I'm sure I won't get caught, I ride over the speed limit – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Agree	26	28	14	28	25	30	25	27	27	26	28	29
Neither	4	4	3	4	4	4	4	4	4	4	5	3
Disagree	68	67	83	67	69	65	69	69	68	70	67	66

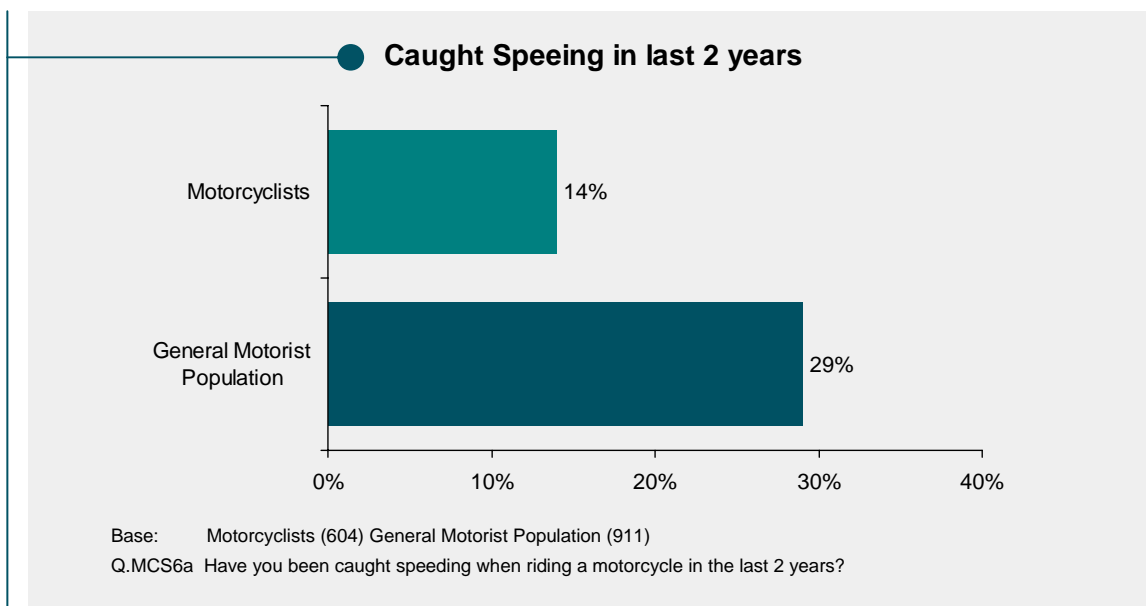
Base: Total Sample - Motorcyclists (1755)

Q. I am going to read out a statement other people have made about riding and speeding. Can you tell me whether you agree or disagree with the statement by answering agree strongly, agree partly, neither agree nor disagree, disagree partly or disagree strongly.

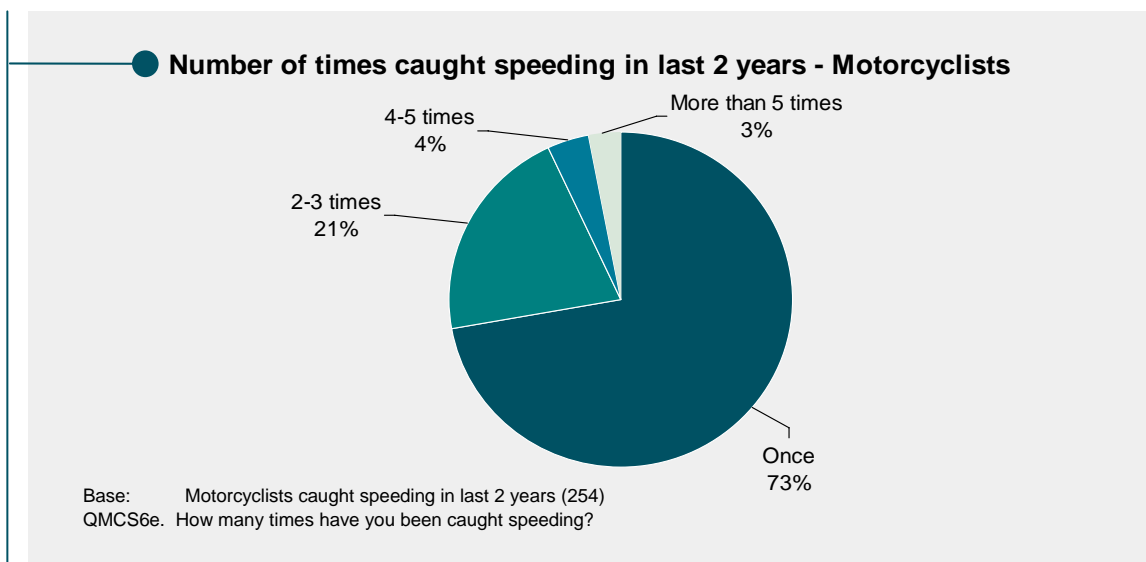


Caught Speeding in Last Two Years

- The proportion of motorcyclists caught speeding in the last 2 years is significantly lower than what we see for motorists (14% vs. 29% respectively).



- Of those riders caught for speeding in the last 2 years, the majority (73%) have only been caught on one occasion.



Caught Speeding in Last Two Years

- Motorcyclists in metropolitan areas and those who commute on a motorcycle show the highest incidence of being caught for speeding in the last 2 years (19% and 20% respectively).
- Females are less likely than males to have been caught for speeding (6% vs. 15% respectively).
- Off-Road riders also show a noticeably lower incidence of being caught for speeding (8% vs. 14% for total sample).

Caught Speeding in Last Two Years – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Caught speeding	14	15	6	15	14	16	15	19	10	20	17	8
Not caught speeding	86	85	94	85	86	84	85	81	90	80	83	92

Base: Motorcyclists (1755)
 QMCS6a. Have you been caught speeding when riding a motorcycle in the last 2 years?



Section 5: Drink Riding – Attitudes and Behaviours



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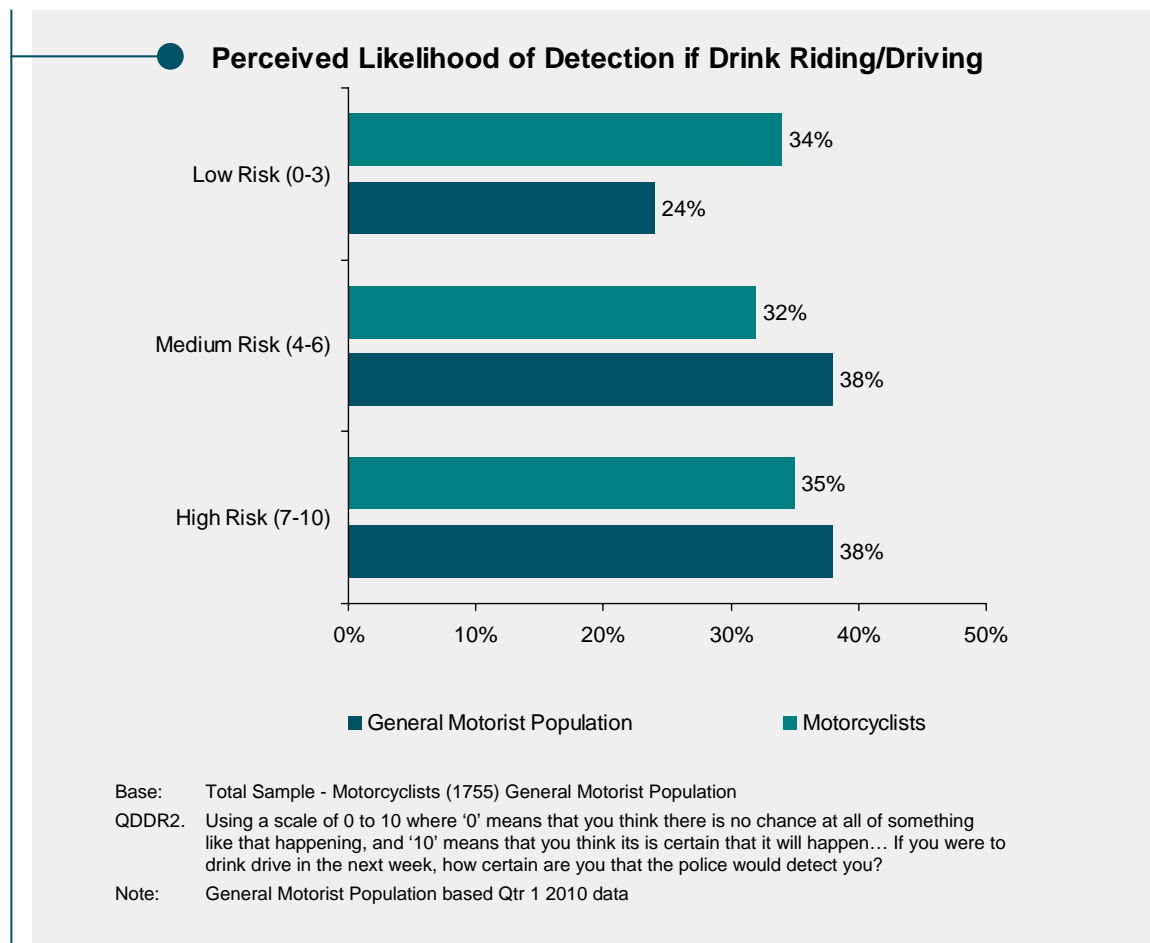


SWEENEY RESEARCH

Transport Accident Commission – Motorcycle Tracking

Perceived Likelihood of Detection if Drink Riding

- The perceived 'high' risk of being detected for drink riding is greater than the perceived 'high' risk of detection for speeding (35% vs. 29% respectively).
- However, more motorcyclists rate the risk of detection for drink riding/driving as 'low' than for the general motorist population.



Perceived Likelihood of Detection if Drink Riding

- Regional riders are less likely to believe there is a high risk of being detected for drink riding (33% vs. 37% for metro riders).
- Those who participate in off-road riding are also less likely to think the risk of being detected is high (30% vs. 35% for total sample).
- Male riders are less likely to think there is a high risk of being detected for drink riding (34% vs. 40% for female riders).

Perceived Likelihood of Detection if Drink Riding – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Low Risk (0-3)	34	34	30	35	33	36	32	31	37	35	32	37
Medium Risk (4-6)	32	32	27	30	33	30	34	33	31	32	32	32
High Risk (7-10)	35	34	40	35	34	34	34	37	33	33	36	30

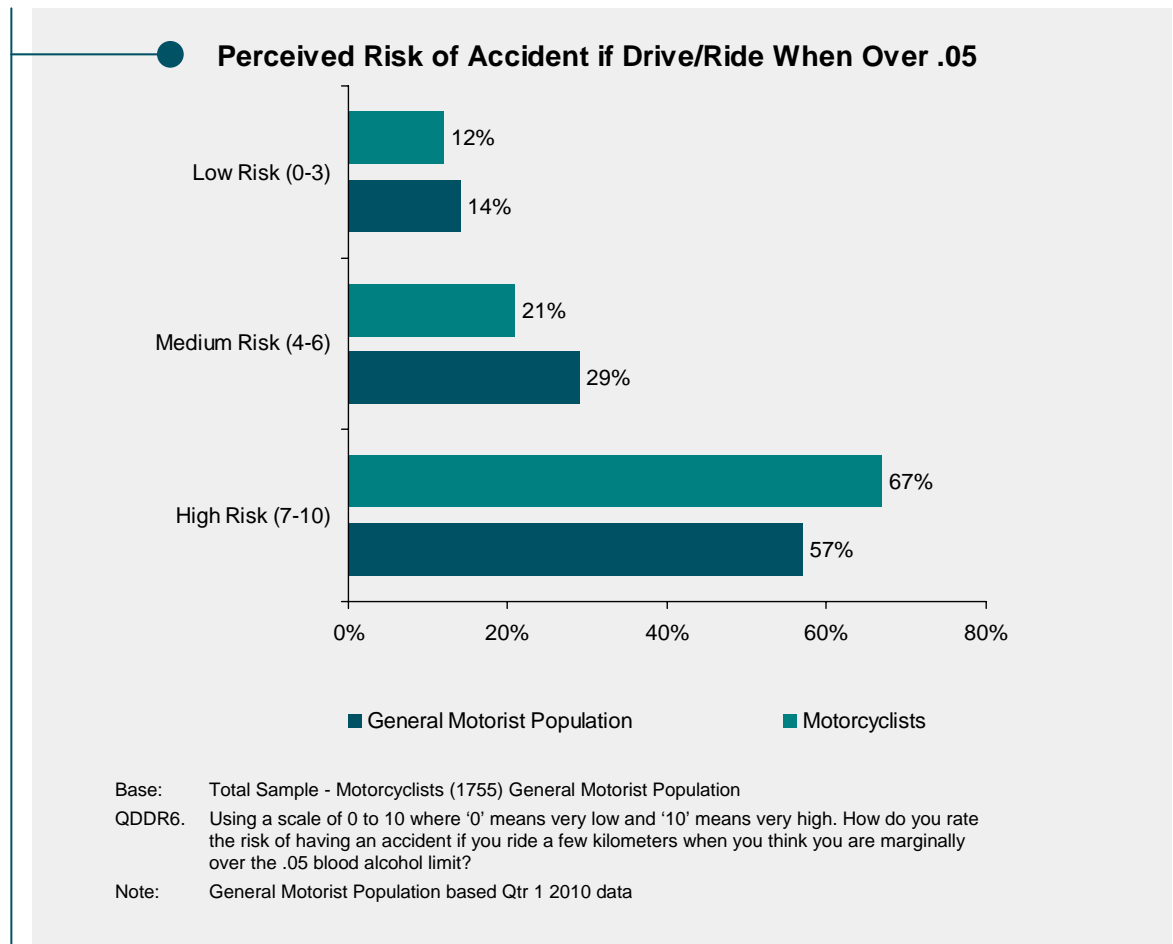
Base: Total Sample - Motorcyclists (1755)

Q. Using a scale of 0 to 10 where '0' means that you think there is no chance at all of something like that happening, and '10' means that you think its is certain that it will happen... If you were to drink drive in the next week, how certain are you that the police would detect you?



Perceived Risk of Accident if Drive/Ride When Over .05

- Motorcyclists are more likely to nominate a high risk of having an accident when riding over .05 than the general population average (67% vs. 57% respectively).



Perceived Risk of Accident if Drive/Ride When Over .05

- The majority of riders believe the risk of accident when riding over .05 is medium or high. Approximately 1 in 10 believe there is a low risk of accident when riding over .05.
- Females and riders aged 18-39 years are more likely to believe the risk of accident is high (76% and 71% respectively vs. 67% for total sample).

Perceived Risk of Accident if Drive/Ride When Over .05 – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Low Risk (0-3)	12	12	6	9	14	10	14	10	13	11	11	14
Medium Risk (4-6)	21	21	18	19	22	20	24	21	21	22	21	22
High Risk (7-10)	67	67	76	71	64	70	64	69	66	67	68	64

Base: Total Sample - Motorcyclists (1755)

QDDR6. Using a scale of 0 to 10 where '0' means very low and '10' means very high. How do you rate the risk of having an accident if you ride a few kilometers when you think you are marginally over the .05 blood alcohol limit?

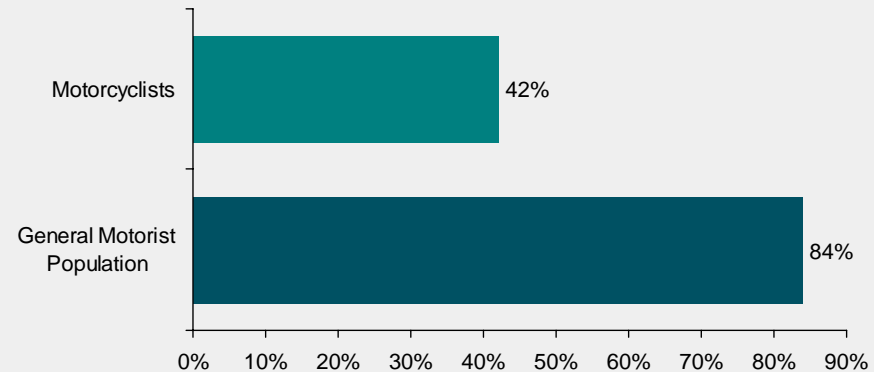


Drink Drive/Ride Enforcement

- Exposure to drink drive/ride enforcement is significantly lower amongst motorcyclists than general motorists.
- Approximately 4 in 10 motorcyclists have seen drink drive/ride enforcement while riding in the last 3 months, compared with more than 4 in 5 motorists.

- The proportion of motorcyclists breath tested in the last 3 months is also lower than the average for general motorists.
- 1 in 3 motorcyclists (31%) recall being tested in the last 3 months compared with more than 4 in 10 motorists (45%).
- The incidence of breath testing for motorcyclists is higher for males than females (33% vs. 20% respectively).

Seen drink drive/ride enforcement in last 3 months

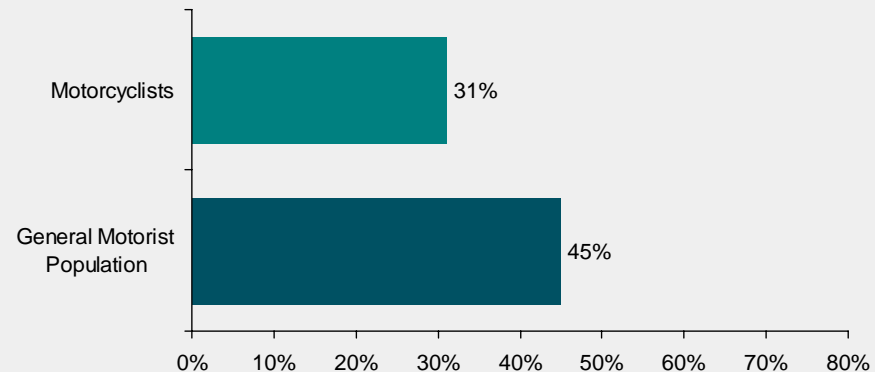


Base: Total Sample - Motorcyclists (1755) General Motorist Population

Q. How many times have you seen police doing drink drive/ride enforcement while riding in the last 3 months?

Note: General Motorist Population data based on long term average

Breath tested in last 3 months



Base: Total Sample - Motorcyclists (1755) General Motorist Population

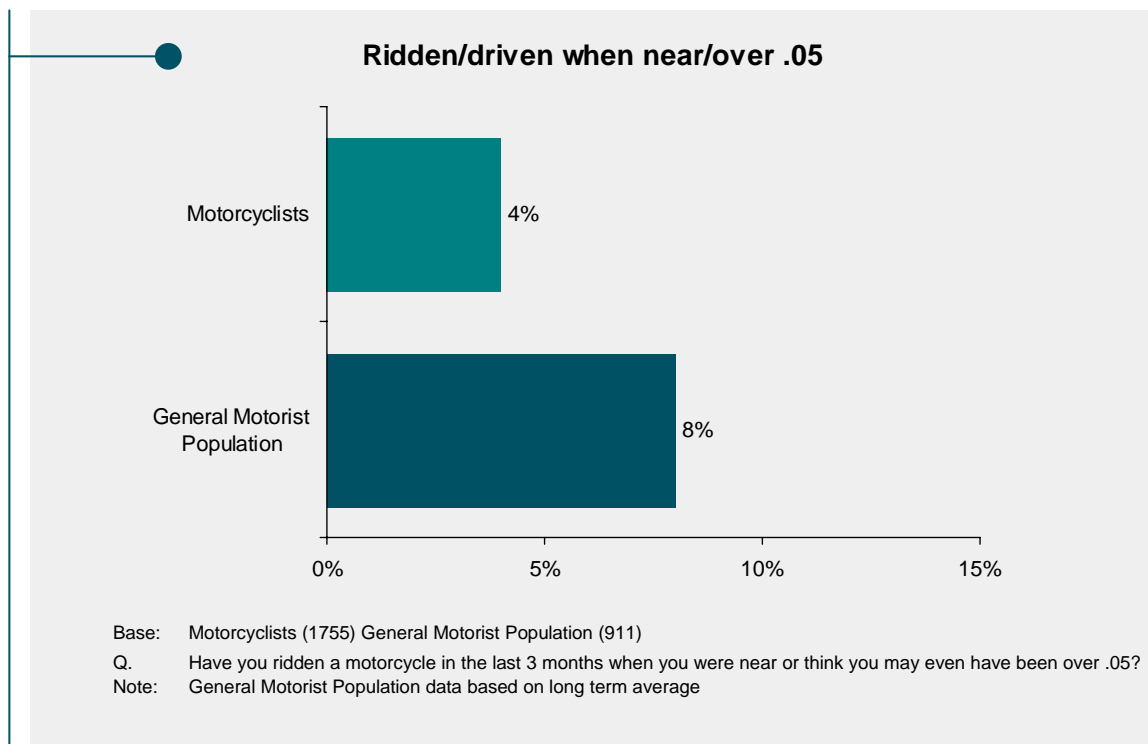
Q. How many times have you been breath tested in the last 3 months while riding a motorcycle?

Note: General Motorist Population data based on long term average



Self Reported Drink Driving/Riding

- The incidence of self reported drink riding is low amongst motorcyclists (4%).
- Motorists show a higher incidence of driving when over .05 (8%).
- The incidence of self reported drink riding is lower amongst female riders (1% vs. 4% for the total sample), but relatively consistent across all the other segments.



Ridden/driven when near/over .05 – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Yes	4	4	1	5	3	5	3	4	3	5	4	3
No	96	96	99	95	97	95	97	96	96	95	96	97

Base: Total Sample - Motorcyclists (1755)
 QDDR4a. Have you ridden a motorcycle in the last 3 months when you were near or think you may even have been over .05?

Section 6: Drug Riding – Attitudes and Behaviours



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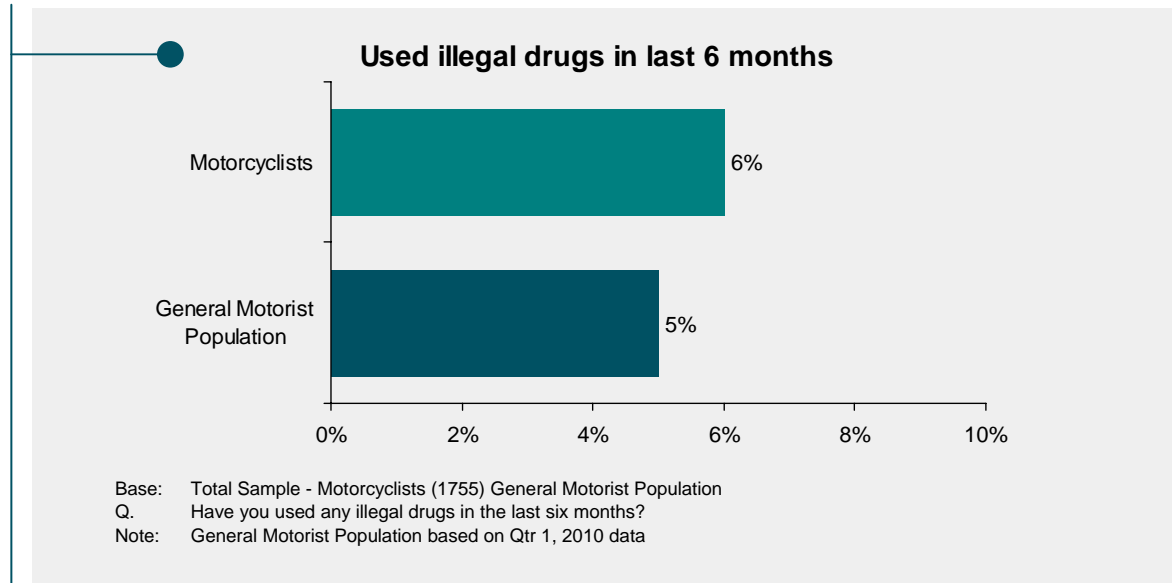


SWEENEY RESEARCH

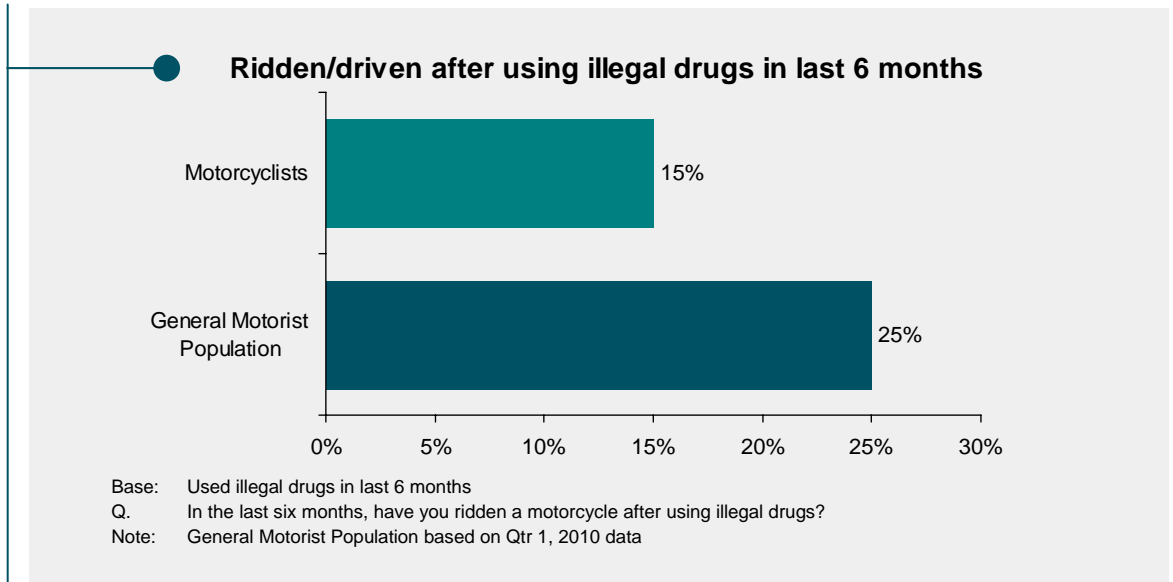
Transport Accident Commission – Motorcycle Tracking

Behaviour with Illegal Drugs

- The incidence of using illegal drugs amongst motorcyclists is in-line with general motorist trends (6% report using illegal drugs in last 6 months).

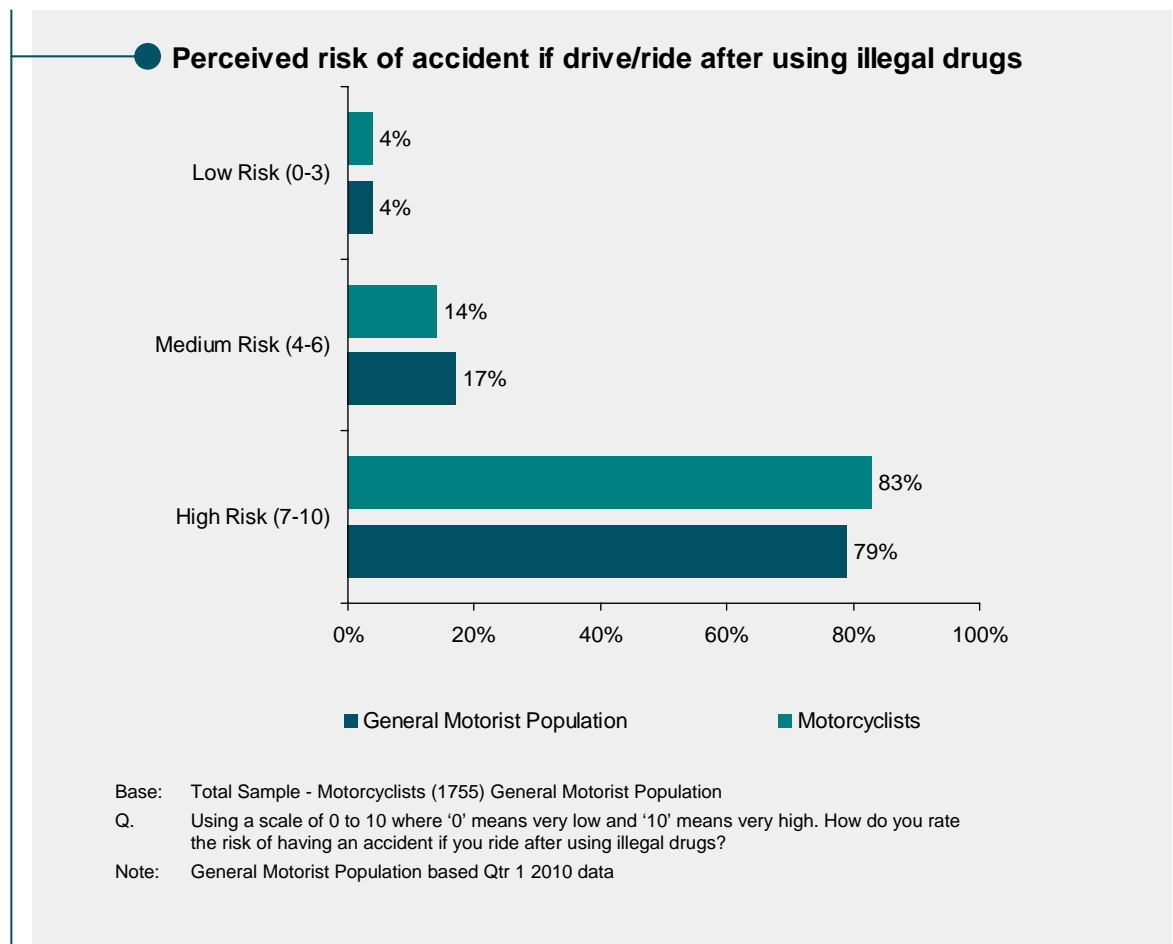


- Of those who report using illegal drugs in the last 6 months, 15% have ridden a motorcycle after using illegal drugs which is considerably lower than for the general motorist population.



Perceived Risk of Accident if Drive/Ride After Using Illegal Drugs

- The perceived risk of having an accident when riding after taking illegal drugs is considerably higher than the risk associated with driving when over .05.
- The majority (83%) of riders believe there is a high risk of having an accident if riding after taking illegal drugs.
- The perceived risk is largely consistent for both motorcyclists and motorists.



Perceived Risk of Accident if Drive/Ride After Using Illegal Drugs

- More than 4 in 5 riders consider the risk of accident when riding after using illegal drugs to be very high.
- This is a consistent view across all segments and is on-par with general population motorist trends.
- The perceived risk of having an accident when riding after taking illegal drugs is highest among females (90% vs. 83 for the total sample).

Perceived Risk of Accident if Drive/Ride After Using Illegal Drugs– By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Low Risk (0-3)	4	4	0	3	4	4	4	4	4	4	4	3
Medium Risk (4-6)	14	14	10	13	14	14	14	14	14	13	13	15
High Risk (7-10)	83	82	90	84	82	82	81	83	82	82	83	81

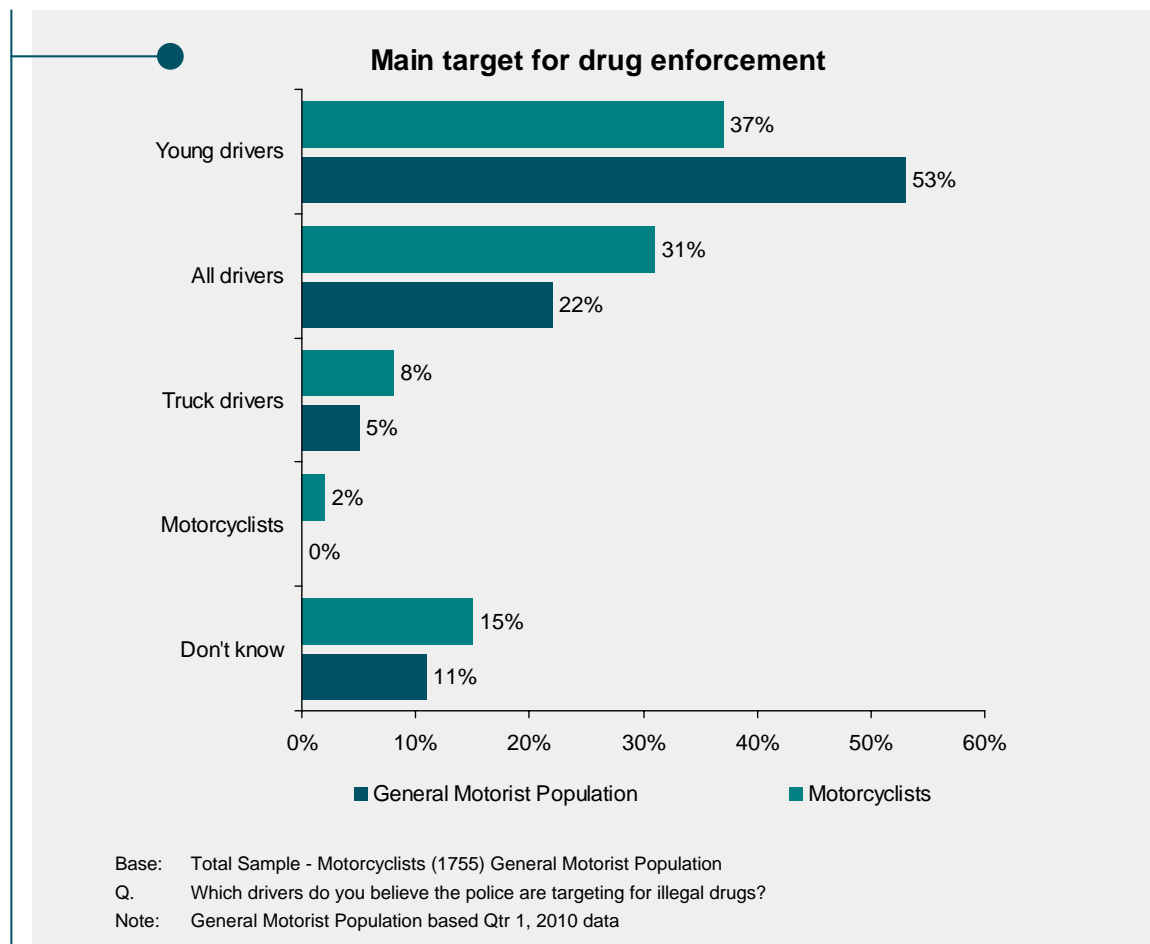
Base: Total Sample - Motorcyclists (1755)

QDER7. Using a scale of 0 to 10 where '0' means very low and '10' means very high. How do you rate the risk of having an accident if you ride after using illegal drugs?



Main Target for Drug Enforcement

- Young drivers are commonly cited as the main target for drug enforcement amongst motorcyclists.
- Approximately 1 in 3 motorcyclists believe all drivers are being targeted by drug enforcement (vs. 22% amongst the general motorist population).



Section 7: Motorcyclist Safety



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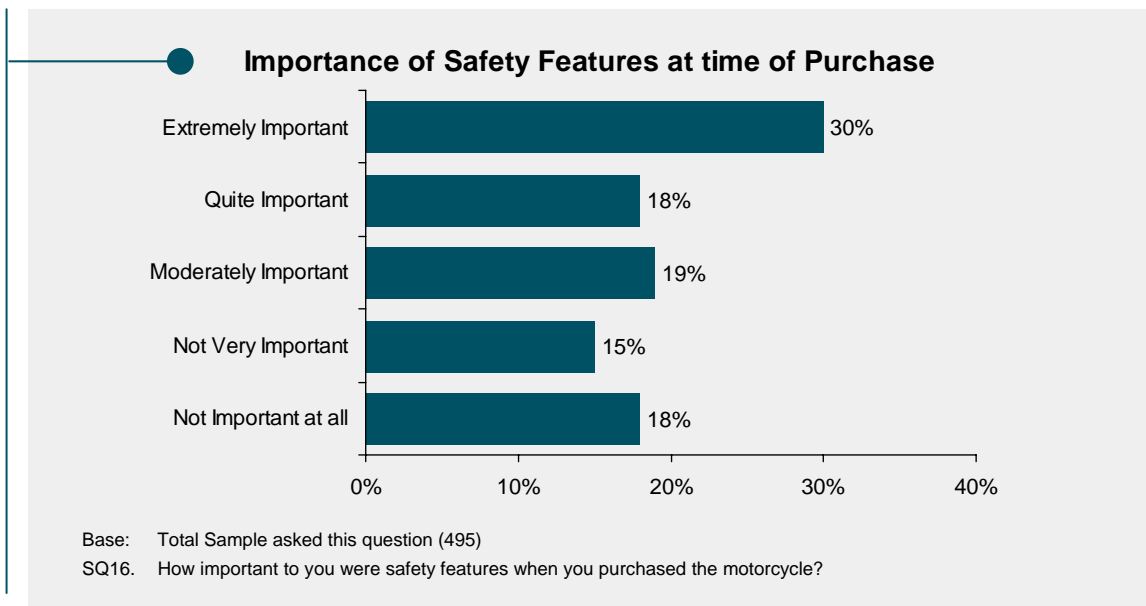


SWEENEY RESEARCH

Transport Accident Commission – Motorcycle Tracking

Importance of Safety Features at time of Bike Purchase

- Safety Features were important to (67%) of motorcyclists at the time they purchased their bike. They were more important to females (81%) than males (66%).
- Safety features were also more important to older riders (40+) with 73% of them rating safety features as important as compared to 61% of younger riders.



- The proportion rating the importance of safety features at the time of purchase as extremely/quite important is notably higher amongst those who purchased their motorcycle 1 to 2 years ago.
- For those who purchased their motorcycle more than 4 years ago, the net importance is lower than for more recent purchases.

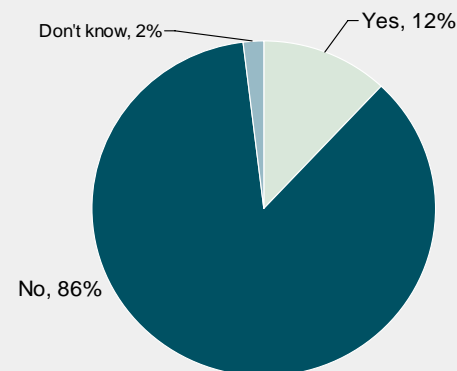
Important of Safety Features at Time of Purchase - By Year of Purchase						
	Total (495) %	Up to 1 year ago (126) %	1 to 2 years ago (92) %	3 to 4 years ago (124) %	4 to 5 years ago (53) %	More than 5 years ago (99) %
Extremely Important	30	29	38	35	28	19
Quite Important	18	18	20	13	13	23
Moderately Important	19	17	18	19	21	21
Not Very Important	15	16	13	17	9	17
Not Important At All	18	19	11	17	28	19
Net Extremely/quite important	48	48	58	48	42	42



Awareness of ABS

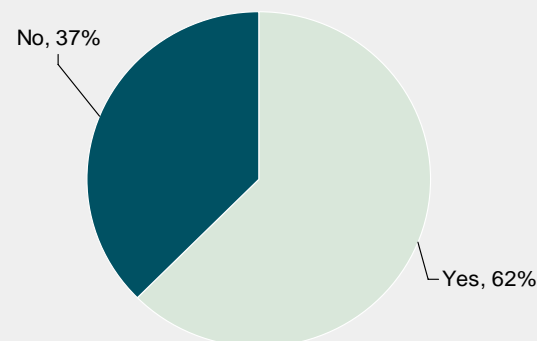
- Only 1 in 10 motorcyclists (12%) have bikes with ABS.
- 21% of females have bikes with ABS as compared to 12% of males.
- Off-Road riders (5%) are the least likely to have ABS on their bikes as compared to Commuters (12%) and On-Road riders (13%).
- More than half of all riders interviewed (62%), would consider a bike with ABS for their next purchase. Commuters (70%) and On-Road riders (68%) are more likely to consider ABS on their next bike compared to Off-Road riders (45%).
- A considerable percentage of riders who have previously been involved in an accident (60%) will also consider ABS on their next bike purchase.

Motorcyclists with Bikes that have ABS



Base: Total sample asked this question (501)
SQ17a. Does your motorcycle have ABS?

Motorcyclists that will consider ABS on their next Bike



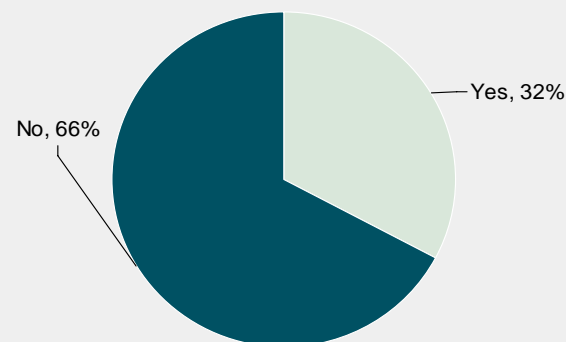
Base: Total sample asked this question (501)
SQ17b. Would you consider ABS on your next motorcycle?



Awareness of Other Motorcycle Safety Features

- Approximately 3 in 10 motorcyclists have heard of other motorcycle features aside from ABS.
- More males (33%) have heard of other safety features than females (26%).

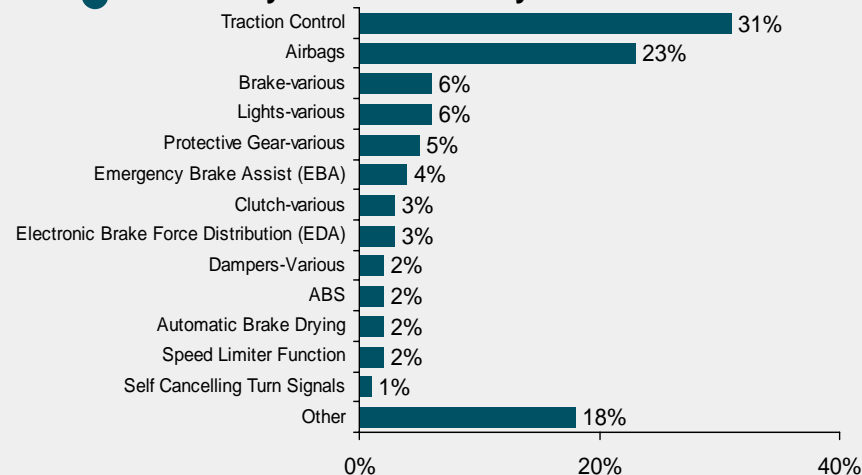
Heard of Safety Features other than ABS



Base: Total sample asked this question (501)
SQ18a Have you heard of any other safety features for motorcycles?

- The most common safety features heard of for motorcycles are Traction Control (29%) and Air Bags (23%).
- Other safety features mentioned consist primarily of braking and steering mechanisms, lighting and protective gear.

Safety Features Motorcyclists have heard of

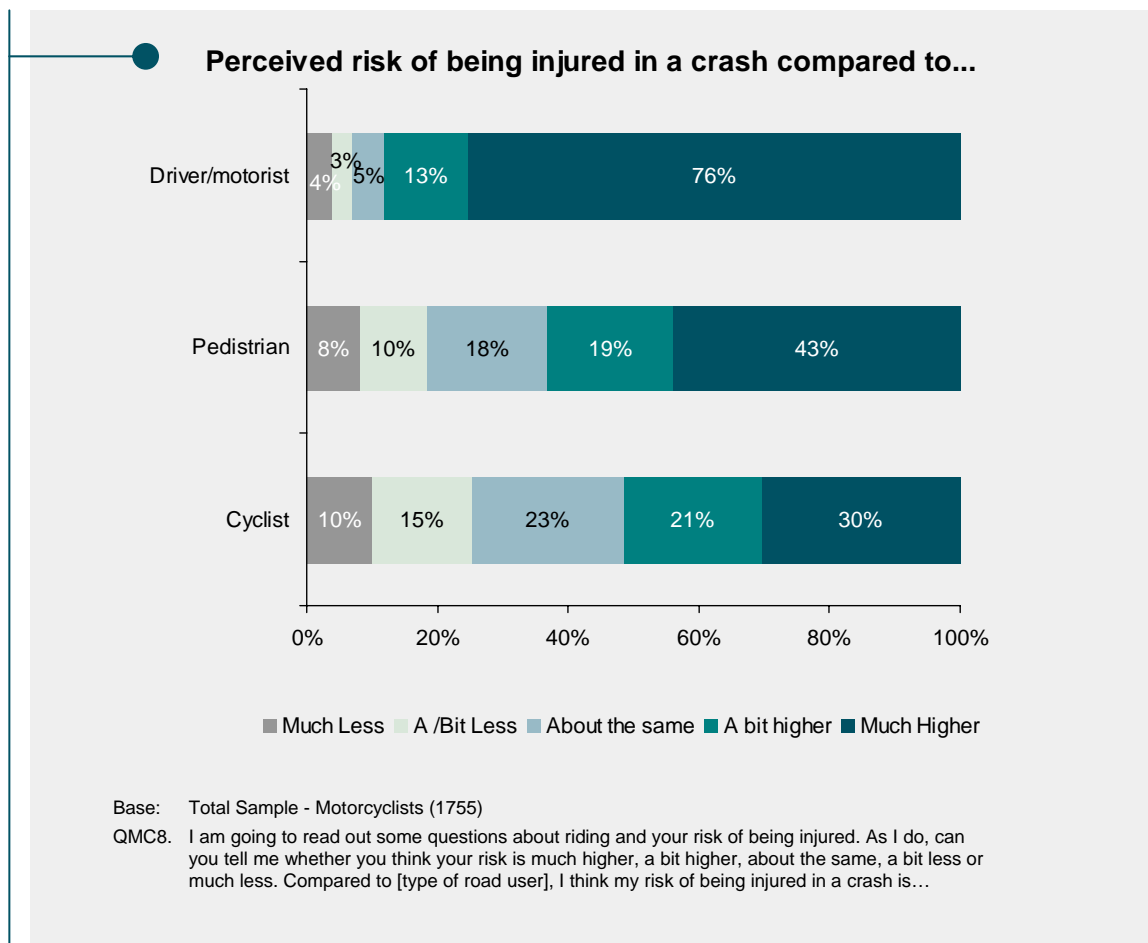


Base: Motorcyclists who have heard of other safety features (162)
SQ18b. What safety features have you heard of?



Risk of Injury Compared to Other Road Users

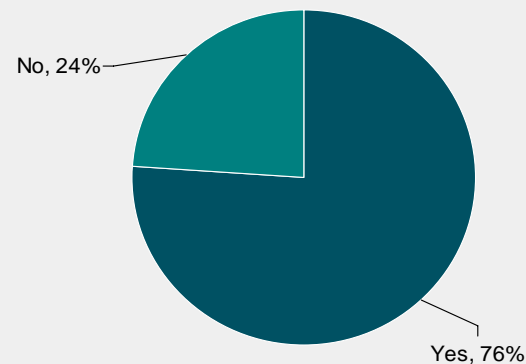
- Motorcyclists believe they are at a much greater risk of being injured in a crash when compared to drivers/motorists.
- More than half of riders also believe their perceived risk is greater than that of pedestrians and cyclists.



Motorcyclist Safety

- There is general agreement amongst riders that bright coloured clothing improves the visibility of motorcyclists.
- However, approximately 1 in 4 riders do not believe bright coloured clothing makes a difference.

Does wearing bright coloured clothing improve visibility of motorcyclists?

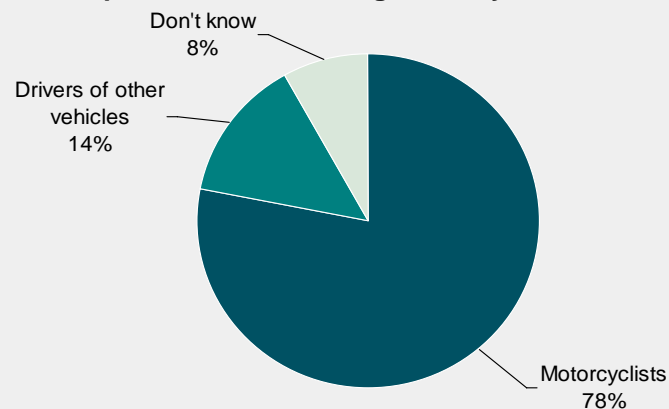


Base: Total Sample - Motorcyclists (1755)

QMC9. Do you think wearing bright coloured clothing makes it easier for motorists to see motorcyclists?

- The majority of motorcyclists (78%) believe it is their responsibility to ensure they can be seen on the road.

Who is responsible for ensuring motorcyclists are seen?



Base: Total Sample - Motorcyclists (1755)

QMC2. Who has the main responsibility to ensure motorcyclists are seen?

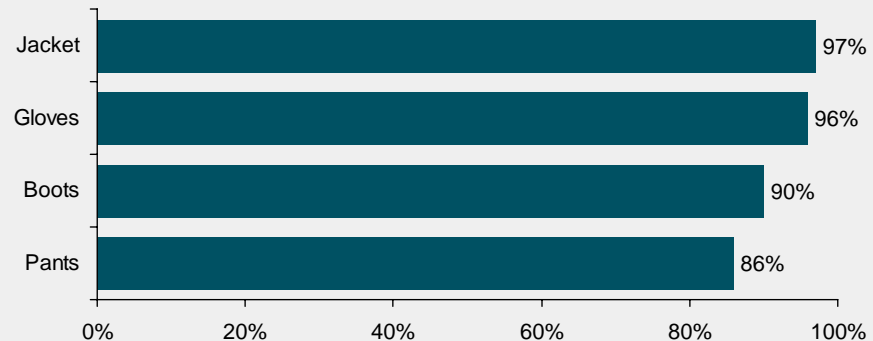


Usage of Protective Clothing

- Almost all riders surveyed own a motorcycle jacket and gloves. Ownership of boots and pants is marginally lower.
- Females are less likely than males to own motorcycle boots (88% vs. 91% for males) and pants (81% vs. 87% for males).
- The main reasons for not owning protective clothing include expense (21%) and the belief that it is not needed (18%).

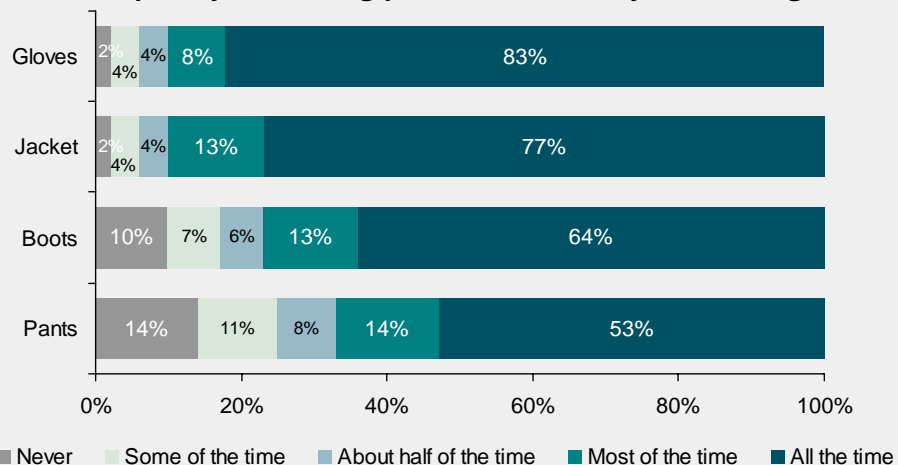
- The majority of riders claim to wear protective gloves and jacket 'all of the time'.
- The frequency of wearing boots and pants is notably lower with 1 in 10 indicating they never wear these items.
- The main reasons cited for not wearing protective clothing 'all of the time' include only riding for a short trip (25%), the gear being too hot (24%), and the inconvenience (20%).

Ownership of protective motorcycle clothing



Base: Total Sample - Motorcyclists (1755)
QMC4b. Which items of protective clothing do you own?

Frequency of wearing protective motorcycle clothing...



Base: Total Sample - Motorcyclists (1755)
QMC4a. When riding a motorcycle, how often do you wear the following items of protective clothing?



Ownership of Protective Motorcycle Clothing

- Ownership of protective motorcycle clothing is generally similar across all segments for jackets and gloves.
- However, fewer females own motorcycle boots and pants than males.
- Those who participate in off-road riding are more likely to own motorcycle boots and pants (94% and 93% respectively vs. 90% and 86% respectively for the total sample).
- Motorcycle pants are the least commonly owned protective gear across all segments.

Ownership of protective motorcycle clothing – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Jacket	97	97	98	98	96	98	96	98	97	98	98	96
Gloves	86	96	99	96	96	95	96	97	95	96	96	96
Boots	90	91	88	89	91	89	92	89	91	87	91	94
Pants	86	87	81	89	84	89	84	87	85	84	87	93
Base: Total Sample - Motorcyclists (1755) QMC4b. Which items of protective clothing do you own?												



Frequency of Wearing Motorcycle Jacket

- The majority of riders claim to wear a motorcycle jacket all or most of the time.
- Females are more likely than males to wear a motorcycle jacket all of the time (87% vs. 77% respectively).
- Males aged 40+ years are less likely than males aged 18-39 years to wear a motorcycle jacket all of the time (75% vs. 79% respectively).
- Riders living in the regional areas are less likely to wear jackets all of the time (75% vs. 80% Melbourne).

Frequency of wearing motorcycle jacket – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
All of the time	77	77	87	79	76	79	75	80	75	75	78	77
Most of the time	13	14	6	12	14	12	15	11	15	16	14	11
About half of the time	4	4	1	4	3	4	4	3	4	4	3	5
Some of the time	4	4	4	4	4	4	4	3	4	4	3	5
Never	2	2	1	1	3	2	2	2	2	2	2	2

Base: Total Sample - Motorcyclists (1755)
QMC4a. When riding a motorcycle, how often do you wear the following items of protective clothing?



Frequency of Wearing Motorcycle Gloves

- The proportion of riders claiming to wear motorcycle gloves all of the time is fairly consistent across all segments with more than 4 in 5 stating they wear motorcycle gloves all of the time.
- More females wear gloves all the time (89% vs. 82% of males)
- Riders that live in metropolitan areas (86%) are also more likely to wear gloves than those living in the regional areas (79%).
- Off-Road riders (87%) are also more likely to wear motorcycle gloves all the time than commuters and On-Road riders (71% and 82% respectively).

Frequency of wearing motorcycle gloves – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
All of the time	83	82	89	85	81	84	80	86	79	71	82	87
Most of the time	8	8	6	7	9	7	9	7	9	9	9	7
About half of the time	4	4	2	4	3	4	3	3	4	3	4	3
Some of the time	4	4	2	2	5	3	5	2	5	4	4	3
Never	2	2	1	1	2	2	2	1	2	2	2	1

Base: Total Sample - Motorcyclists (1755)
Q. When riding a motorcycle, how often do you wear the following items of protective clothing?



Frequency of Wearing Motorcycle Boots

- Off-road riders are the most likely to wear motorcycle boots all of the time (74% vs. 64% for total sample).
- Those who use their motorcycle for commuting show noticeably lower incidence of wearing motorcycle boots all of the time (55%).

Frequency of wearing motorcycle boots – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
All of the time	64	64	66	62	65	61	66	61	67	55	63	74
Most of the time	13	13	11	12	14	12	14	13	12	13	14	12
About half of the time	6	7	4	7	5	8	5	6	6	7	7	5
Some of the time	7	7	6	7	7	8	6	8	6	10	7	4
Never	10	10	13	11	9	11	8	11	9	14	9	5

Base: Total Sample - Motorcyclists (1755)
 Q. When riding a motorcycle, how often do you wear the following items of protective clothing?



Frequency of Wearing Motorcycle Pants

- Only half of motorcyclists cite wearing motorcycle pants all of the time when riding.
- Again, we see that off-road riders are more diligent in wearing protective clothing with 67% claiming to wear motorcycle pants all of the time when riding (vs. 44% for commuters and 50% for on-road riders).
- Riders aged 40+ years are also less likely to wear motorcycle pants all of the time when riding (48% vs. 57% of 18-39 year olds who claim to wear motorcycling pants all of the time).

Frequency of wearing motorcycle pants – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
All of the time	53	53	49	57	48	57	49	52	53	44	50	67
Most of the time	14	14	14	14	14	14	14	14	14	15	15	11
About half of the time	8	8	7	7	9	7	9	8	8	9	9	7
Some of the time	11	11	12	10	12	10	12	13	10	15	12	8
Never	14	13	17	11	16	11	16	13	14	16	13	6

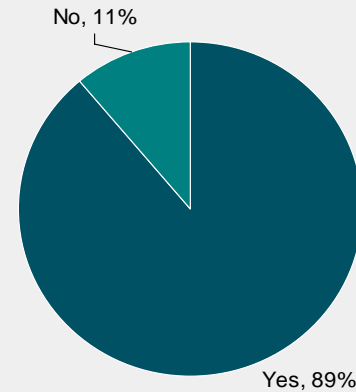
Base: Total Sample - Motorcyclists (1755)
Q. When riding a motorcycle, how often do you wear the following items of protective clothing?



Protective Motorcycle Clothing for Passengers

- The majority of motorcyclists (89%) indicate that they make sure their passenger is also wearing protective clothing.
- Off-road motorcyclists show slightly lower intention to ensure passengers are wearing protective clothing (87% vs. 91% for on-road riders and 91% for commuters).

Ensure Passengers are Wearing Protective Clothing

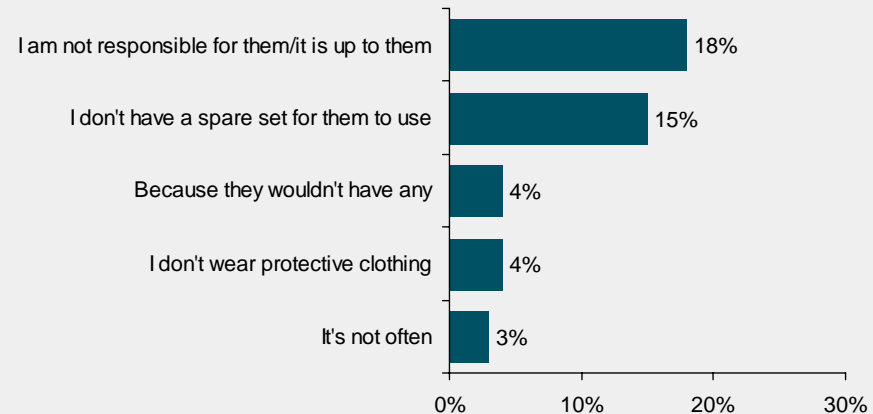


Base: Total Sample - Motorcyclists (1755)

QMC4c. If you carry a pillion passenger, do you make sure they wear protective clothing?

- The rationale for not making motorcycle passengers wear protective clothing is that it is the passengers responsibility not the riders (18%) and that there is no spare set available (15%).

Reasons why Passengers don't Wear Protective Clothing



Base: Do not ensure passengers wear protective clothing (187)

QMC4f Why don't you ensure passengers wear protective clothing?

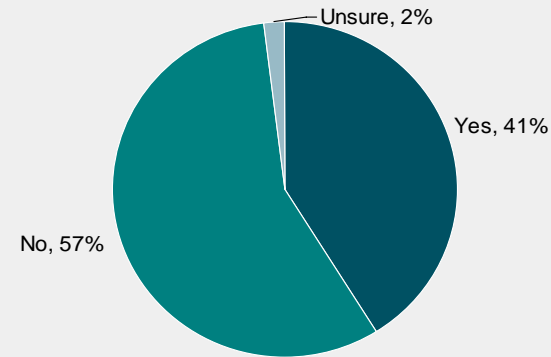
Note: Responses below 3% excluded



Intention to Purchase Protective Motorcycle Clothing

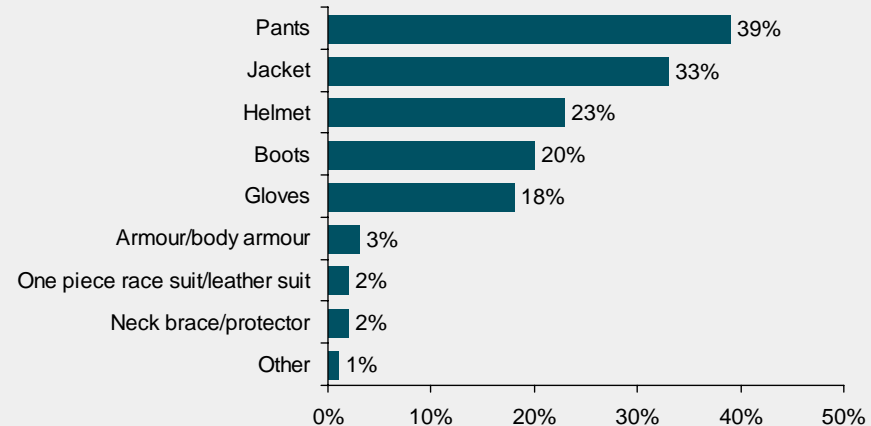
- More than 4 in 10 motorcyclists surveyed show intention to purchase protective motorcycle clothing in the next 6 months.
 - Intention to purchase protective clothing is strongest amongst younger riders almost half of 18-39 year olds (47%) indicate intention to purchase vs. 36% for those aged 40+ years.
 - Male riders also have a stronger intention of purchasing protective clothing (42% vs. 35% of females).
-
- Motorcycle pants and jackets were the most common items of clothing to be purchased by those who indicated intention to purchase protective clothing in the next 6 months.

Intend to Purchase Motorcycle Protective Clothing in Next 6 months



Base: Total Sample - Motorcyclists (1755)
QMC5a. Do you intend to purchase any protective motorcycle clothing within the next 6 months?

Type of Protective Clothing Likely to Purchase



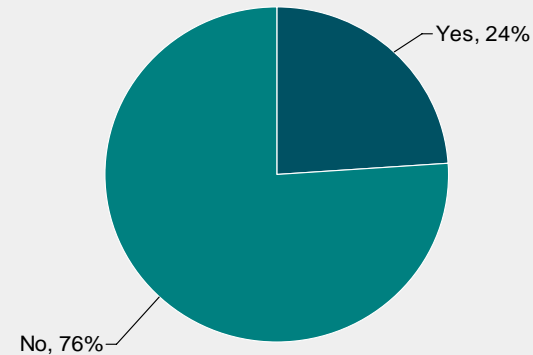
Base: Intend to purchase protective clothing in next 6 months (724)
QMC5b. What motorcycle clothing do you intend to buy in the next 6 months?



Awareness of European Union (EU) Standards

- Approximately 1 in 4 Victorian riders are aware of the EU standards for protective motorcycle clothing.
- Motorcyclists in metropolitan areas show higher awareness of the EU standards compared with regional riders (27% vs. 21% respectively).

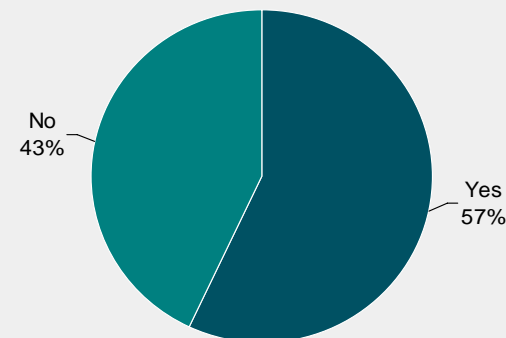
Aware of EU Standards for Protective Motorcycle Clothing



Base: Total Sample - Motorcyclists (1755)
QMC5c. Are you aware of the European Union (EU) standards relating to protective motorcycle clothing?

- Of those aware of the EU standards, approximately half (57%) claim that they look for the standard on garments with purchasing protective clothing.

Look for EU Standards when Purchasing Protective Clothing



Base: Aware of EU standards (422)
QMC5d. When purchasing protective clothing, do you look for the EU standard on garments?



Awareness of European Union (EU) Standards

- Approximately 1 in 4 motorcyclists are aware of the EU Standards for protective motorcycle clothing.
- Awareness of the EU standards is lower amongst motorcyclists in regional Victoria 21% vs. 27% for motorcyclists in metropolitan areas.

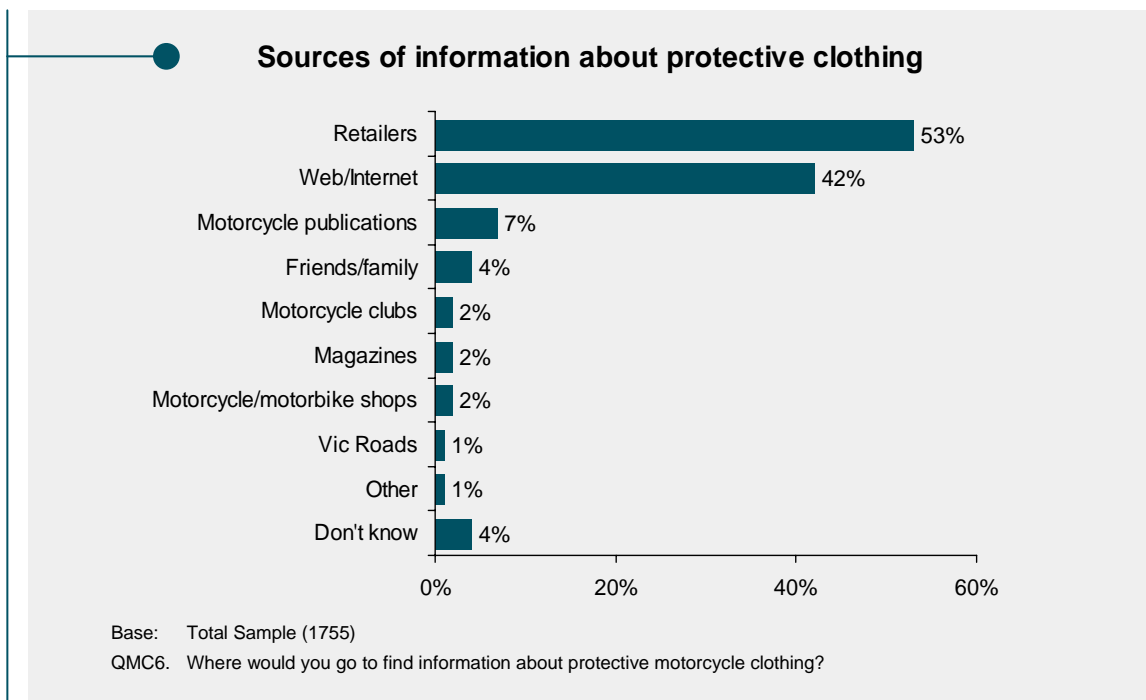
Awareness of European Union (EU) Standards – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male (1615) %	Female (140) %	18-39 (875) %	40+ (880) %	18-39 (796) %	40+ (819) %	Melb (886) %	Reg Vic (867) %	Commuter (882) %	On-Road (1294) %	Off-Road (537) %
Aware of EU Standards	24	24	27	26	23	25	22	27	21	26	25	23
Not Aware of EU Standards	76	76	73	74	78	75	78	73	79	74	75	77

Base: Total Sample - Motorcyclists (1755)
QMC5c.Are you aware of the European Union (EU) standards relating to protective motorcycle clothing?



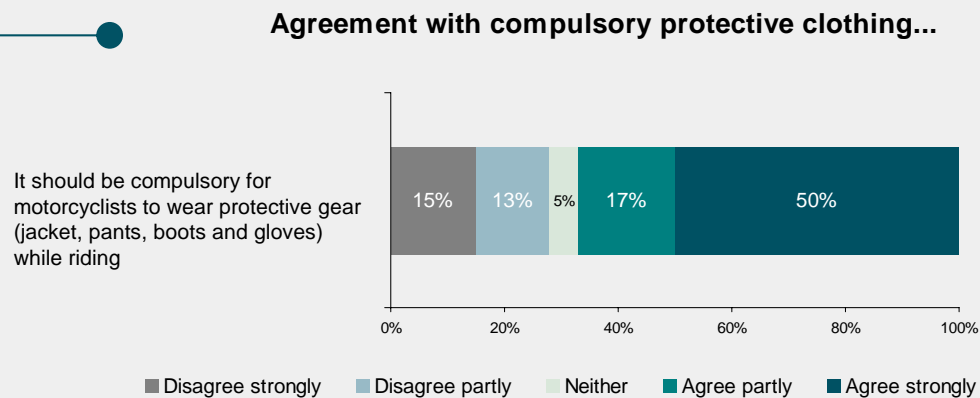
Information Sources – Protective Clothing

- Retailers and the internet are the most common sources of information about protective clothing.



Attitudes Towards Protective Clothing

- Support for compulsory protective clothing is moderate with 2 in 3 agreeing strongly or partly with this concept.



Base: Total Sample - Motorcyclists (1755)

QMC7. Can you tell me if you agree strongly, agree partly, neither agree nor disagree, disagree partly, or disagree strongly with the following statement?



Attitudes Towards Protective Clothing

- Females (88%) and Off-Road riders (73%) show very strong support for compulsory protective clothing compared to 67% for the total sample.

Attitudes Towards Protective Clothing – By Key Demographics												
	Total (1755) %	Gender		Age		Male by Age		Location		Type of Rider		
		Male	Female	18-39	40+	18-39	40+	Melb	Reg Vic	Commuter	On-Road	Off-Road
		(1615) %	(140) %	(875) %	(880) %	(796) %	(819) %	(886) %	(867) %	(882) %	(1294) %	(537) %
It should be compulsory for motorcyclists to wear protective gear (jacket, pants, boots and gloves) while riding	67	65	88	69	65	67	64	66	68	62	66	73
Base: Total Sample - Motorcyclists (1755)												
QMC7 Can you tell me if you agree strongly, agree partly, neither agree nor disagree, disagree partly, or disagree strongly with the following statement?												





Thank You

