MOTORCYCLIST ATTITUDINAL RESEARCH INSIGHTS REPORT 2023

Hall & Partners Behavioural Science Unit for Transport for NSW

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Executive Summary

The Road Safety Action Plan (RSAP 2026) was launched by the NSW Government in April 2022 and features targeted and proven initiatives to address key trends, trauma risks and the types of crashes occurring on NSW roads, including motorcycle crashes. There are several actions within the RSAP that pertain specifically to motorcyclists and their safety on the road. The motorcycle space has changed significantly in terms of vehicles, programs, policies, and rider demographics over the past ten years. To support the development of initiatives related to the RSAP, Transport for NSW sought to gain an up-to-date understanding of the knowledge, attitudes, and self-reported behaviours and approach to safety of NSW motorcycle riders, and of drivers towards motorcyclist safety.

Hall & Partners was commissioned to conduct market research through a mixed methodological approach. The key insights, implications, and recommendations informed by the evidence-base are detailed in this report. These findings will support the development and enhancement of policies and programs related to motorcyclist safety, including enhancements to the MGLS, MotoCAP and CRASH, other actions in the RSAP 2026 and development of a new motorcycle safety behavioural campaign.

Key insights

Riding is more than just a means of transport, it is closely linked with a riders' social identity

- Many identified with being part of an unofficial rider community and embraced the riding culture.
- This revealed different cultural levers to leverage in communications on the topics of safety. Whilst drivers held some misconceptions about rider behaviours (particularly in terms of risk taking and invincibility), there was evidence of mutual respect between riders and drivers and the observation that some rider stereotypes are fading.
- Given riders' affinity with riding they cared about how other road users perceived riders as a group. Many saw themselves as playing a role to uphold a positive reputation for the riding community by practicing safe riding behaviours.
- 79% of riders agree or strongly agree "there are certain groups of riders who give us all a bad reputation."

There is an understanding that riding comes with inherent risks and feeling vulnerable on the road – there is an opportunity to reframe risk perceptions in these instances helping riders to understand that there is always a risk regardless of the ride.

- 72% of riders agree or strongly agree "as a rider I am always the most vulnerable on the road."
- The risks associated with riding were seen on a continuum with higher risks factors, those that impacted a riders' balance or impaired their visibility whilst riding, and lower risk factors those that riders believed they could control and minimise through skill (such as riding in traffic or among heavy vehicles, lane filtering, speeding, and weaving and overtaking). This categorisation of risks was found to have a bearing on how riders behaved and the level of comfort they felt to push the boundaries.
- Additionally, pushing the boundaries of factors that were perceived as lower risk was widely acceptable among riders (such as riding about the speed limit) and there was strong evidence to show that normalisation of these behaviours has altered the benchmark for how risky these activities considered.

Overconfidence was found to play a role in inadvertent risk-taking through an underestimation of risk associated with certain situations

- With an average self-rated skill level of 7.5, 56% of riders consider themselves an 8/10 rider or better.
- 18% of riders agree or strongly agree "I know everything I need to know about riding, there is nothing new to learn" and "No one can tell me how to ride, it's my way or the highway"
- Whilst there were some riders who displayed a constant state of overconfidence, the research found that for most riders this fluctuated across their experience riding. Peak overconfidence was largely found to coincide with a few years' experience and the transition from Provisional to Full licence.

Crashes may not be a viable territory to influence sustained shifts in attitudes and behaviours

- 36% of riders have either never experienced a crash of any kind, or a close call (without falling off their bike)
- 36% of riders have experienced severe consequences from a crash (fracture/broken bones, hospitalisation, concussion and/or written off vehicle).
- 13% of riders agree or strongly agree "surviving an accident makes me feel invincible."
- 22% of riders agree or strongly agree "having an accident doesn't change the way I ride"
- Crashes were transformative and influential in encouraging safe riding behaviours, however this effect was short-lived. Riders commonly reverted to old habits, including relaxed behaviours towards safety and wearing protective gear.

There was widespread acceptance amongst riders that wearing safety gear is important and ownership of protective gear was fairly high.

- 67% of riders agree or strongly agree "there should be no excuse for not wearing all your protective gear on every ride."
- 80% of drivers agree or strongly agree "as a driver I feel more comfortable when I see a rider wearing all of their protective gear" and 56% say "I always notice what protective gear riders are wearing."
- However, ownership did not always translate to consistent use. In particular, many riders believed that there are certain riding situations (such as a short trip) that do not warrant the wearing of protective gear.

A certain standard of quality and safety was assumed for all protective gear and motorcycles sold in Australia, even though standards only exist for helmets.

- As a result, there was low to moderate awareness and engagement with rating and assessments programs such as MotoCAP and CRASH.
- 49% of riders were aware of MotoCAP prior to taking the survey, and 55% were aware of CRASH.
- 85% of those aware of MotoCAP found the ratings to be somewhat or very useful, and 87% of those aware of CRASH said the same.
- Riders also had relatively low awareness and engagement with motorcycle safety features. This led to a tendency among riders to deprioritise these features when making purchase decisions.
- Among those who were aware of safety ratings, perceptions of their usefulness were high and there was an openness among riders to know more.
- Helmets have provided evidence for the effectiveness of mandating safety gear and there was a level of permission to mandate all types of safety gear.

The research identified six segments of motorcyclists who each hold a different set of attitudes, beliefs, behaviours, and risk profile to riding: Risky Riders, Trade-off Makers, Experienced Enthusiasts, Comfort-zone Riders, Timid Riders, and Occupational Riders. Overall, segments were differentiated by risk taking behaviours and the extent to which they are involved with riding as an activity.

- Risky Riders and Trade-off Makers are characterised by riders who exhibit greater propensity for risk taking behaviours, whereas Experienced Enthusiasts, Comfort-zone Riders, and Timid Riders were found to be more conservative in their risk appetite.
- Segments with higher category involvement (as determined by their riding frequency, types of trips they take, level of reliance on their motorcycle for transport, and willingness to engage with the hobby and choosing to ride) included Comfort-zone Riders, Risky Riders and Experienced Enthusiasts, with Timid Riders and Trade-off Makers lower in their involvement.
- The report discusses the nuances between segments for each main topic of enquiry and provides insight into the key levers to shift the hearts and minds of each audience towards safer riding practices.

Conclusions and recommendations

The research informed ten conclusions and recommendations for TfNSW to consider to support the organisation's current and future initiatives that seek to promote the safety of motorcyclists and safe riding behaviours. These are summarised below:

1. Learners and Provisional tests are opportune moments for TfNSW intervene with key safety messages – the need exists and the audience are captive.

2. The research revealed seven communication themes that resonate with riders (a short description of each theme is summarised in the table below). There is an opportunity to further explore these themes to inform the development of a new motorcyclist safety behavioural campaign.

Theme	Description
More similar than you know	This idea seeks to show riders that different types of rides have more in common than they think and that there is no situation where protective gear and safety features are not necessary or relevant.
There's always a risk	This idea might seek to address specific cases where the perception of risk is minimised by riders (for example, getting to a crash is unlikely on short rides) and recalibrate their assumptions.
Peace of mind	This idea draws on 'peace of mind' as a universal and emotive motivator to wear protective gear. This might seek to reinforce positive behaviours and encourage wearing gear more frequently (rather than attempt to convert riders who rarely wear protective gear) as well as empower riders to advocate for the benefits.
Riding culture	This idea might leverage language, attitudinal or behavioural codes from riding culture to foster social norms around safe riding and usage of protective gear.
Do your part	This idea draws on the concern that riders have for how they are perceived by other road users and desire to protect the reputation of the riding community. There is potential to motivate riders to do the right thing by engaging them with the message that every rider has a part to play.

Riding rituals	This idea taps into the evidence that creating a ritual around wearing protective gear habitualises the behaviour and reduces permissibility for not 'gearing up'.
Be visible	This idea directly speaks to the leading safety concern of riders and offers a solution to not being seen by drivers and the desire to intercept any inattentiveness drivers exhibit on the road. Reframing the benefit of wearing protective gear as a way to be seen by other road users would be a unique way to talk to riders about wearing gear when riding.

3. Drivers were seen as playing a joint role in the safety of motorcyclist. However, there are indications of a disconnect between rider behaviours and drivers' understanding of them, highlighting a knowledge gap. TfNSW is the most credible voice to communicate to drivers on this topic.
4. Motivating motorcyclists to wear protective gear will require different levers, either taking a rational or emotive approach. There may also be the opportunity to further explore levers that are not current top of mind but that speak to the leading safety concerns of riders.
5. Types of protective gear present different challenges – efforts should be focused to reduce the right hurdle: barriers to owning versus barriers to wearing. Encouraging uptake of gloves, footwear, and armour should address barriers to purchase, whereas uptake of jackets and pants should address barriers to wearing.
6. Mandating ABS/traction control for LAMS approved motorcycles is unlikely to be met with resistance.
7. Assumptions that riders make about the safety of motorcycles and protective gear sold in Australia suggest rating systems such as MotoCAP and CRASH could play a role in helping riders make informed decisions about purchases of safety gear. Many riders assume there is a 'standard' for protective gear sold in Australia, even though this is not the case.
8. There is openness to mandating the wearing of protective gear, particularly for novice riders, however scepticism over how this will be enforced leads riders to think they can get away with not adhering.
9. Incentives are likely to have a positive impact on the uptake of protective gear and helmets, especially if they meaningfully bring down the cost to participate in the hobby. Should TfNSW explore an incentive program to motivate usage of protective gear amongst riders, discount off registration fee and discount/coupon off clothing cost would be most compelling.
10. Social media and web pages related to riding are the optimal channels to engage riders with information about motorcycling and safety. Riders welcome further information about a variety of topics including motorcycling routes, protective clothing, motorcycle maintenance, safety tips, road rules, and rider training.

Segment Bibles are provided as an Appendix to this report.

Background & Objectives

The Road Safety Action Plan (RSAP 2026) was launched by the NSW Government in April 2022 and features targeted and proven initiatives to address key trends, trauma risks and the types of crashes occurring on NSW roads, including motorcycle crashes. The key road safety targets in the RSAP 2026 are to halve deaths and reduce serious injuries by 30 per cent from 2018-20 levels, by 2030. There are several actions within the RSAP that pertain specifically to motorcyclists including the development of enhancements to the Motorcycle Graduated Licensing Scheme (MGLS) to better align with best practice, assessment of the feasibility of an incentive program to increase the use of motorcycle protective equipment measures, mandating the use of protective boots and gloves for novice riders, investigating mandating motorcycle Anti-lock Braking Systems (ABS) as part of the Learner Approved Motorcycle Scheme (LAMS) for novice motorcyclists, and promoting information to encourage safer consumer choices for new and used vehicles, and work with retailers to increase uptake of the safest motorcycle protective clothing and motorcycle helmets.

In 2012, Transport for NSW (TfNSW) commissioned market research to explore the attitudes and behaviours associated with riding from the perspectives of riders and drivers. The research is now 11 years old, and the motorcycle space has changed significantly in terms of vehicles, programs, policies, and rider demographics. Additionally, key programs that are of current interest were either in their infancy or not yet established at the time of research, such as the CRASH and MotoCAP programs, and the research did not address the LAMS in the MGLS. TfNSW identified a need for new research to gain an up-to-date understanding of the knowledge, attitudes, and self-reported behaviours and approach to safety of NSW motorcycle riders, and of drivers towards motorcyclist safety.

Hall & Partners was commissioned to conduct the 2023 market research study and the key insights, implications, and recommendations informed by the evidence-base are detailed in this report. The findings will support the development and enhancement of policies and programs related to motorcyclist safety, including enhancements to the MGLS, MotoCAP and CRASH, other actions in the RSAP 2026 and development of a new motorcycle safety behavioural campaign.

The objectives of the research program are detailed in the diagram below.

How can we best understand the attitudes and behaviours of motorcyclists in regards information policy, initiative and communications?

What is the current level of awareness and understanding of self reported behaviours among motorcyclists?

- What are the current levels of self awareness around behaviour from motorcyclists?
- How does this behaviour differ by rider type or location?
- Which issues or noticed behaviours about riding are top of mind for motorcyclists?
- How do these perceptions differ by motorcyclist type?
- What role does the type of riding have on awareness of behaviours (for example, riding for leisure vs. riding for work or commuting)?
- How have attitudes changed (from 2012) in the following areas: speeding, fatigue, drink and drug riding, protective equipment and safety gear, riding in varied conditions, reason for riding and level of rider training?
- What does the motorcycle community feel about novice riders (provisional riders)? What do they notice about novice rider behaviours?
- What are the views of drivers when sharing the road with motorcyclists?
- What is the driver experience of driving with motorcyclists on the road?
- What are the key issues for drivers?
- What are the commonly held attitudes of drivers when it comes to motorcyclists?

What are the key decision-making criteria and influences when purchasing a motorcycle?

- What are the key decision-making criteria by rider type when it comes to features of a motorcycle?
- What are the key safety features of a motorcycle that are considered? How does this flow down to safety features such as ABS and Traction Control?
- How does intended motorcycle use impact the hierarchy of these criteria?
- What are the current knowledge and awareness levels of safety features as part of the LAMS criteria?
- What are the commonly held sentiments around LAMS criteria being mandated?
- What role do comments or preferences from family or friends play when choosing a motorcycle? What about when selecting safety gear or how to engage with safe riding?
- What influence do family and friends have for motorcyclists?
- What influence does the broader riding community have on individual motorcyclists?

What are the current attitudes and behaviours relating to safety when riding?

- What are the currently held attitudes regarding safety gear when riding?
- What is the feeling about helmets and their use? What do motorcyclists notice about other riders and helmets?
- What are the standard safety behaviours for different rider types?
- What role would incentives for increasing the use of protective gear play? What influence would mandating have?
- What is the impact does ride type (spontaneous, commuting, longer ride, etc.) have on choices about safety gear?
- What are the views of the motorcycle community about safety when riding?
- What kind of safety communications are they currently aware of? What works? What doesn't?
- How does the motorcyclist community deal with unsafe riders or those engaging in risky behaviours? What are the social norms?
- What are the differences in engagement with safety when riding for newer and more experienced riders? Those who ride frequently compared to infrequently? Riders of First Nations or CALD origins?

Approach & Methodology

The findings detailed in this report reflect the insights derived from the integration of an initial qualitative phase of research, followed by a quantitative survey.

Qualitative approach

The qualitative research consisted of a series of eight 1.5 hour focus groups with 6-8 riders or drivers per group conducted through a mix of online and in-person venues across a range of relevant cohorts:

	Metropolitan	Regional	Total focus groups
Commuters	1	1	**2**
Hobbyists/Enthusiasts	1	1	**2**
Commercial Riders	1		**1**
Regional Riders		1	**1**
Drivers	1	1	**2**
Total focus groups	**4**	**4**	**8**

The findings and insights from the qualitative research were used extensively to inform the content of the quantitative survey instrument.

Quantitative Approach

The quantitative sample consisted of a total of n=2,021 respondents across three of the below audience cohorts:

Rider Sample (n=912)

- Riders must have ridden either a motorbike or a moped/scooter, or both in the last 6 months:
  - n=495 were sourced from an online panel provider with a nationally representative sample
  - n=417 were sourced from an open link distributed through the networks of the Motorcycles Council of NSW
- For the purposes of this report, these two samples were combined to form the Rider sample after weighting by age and gender was applied. More information regarding the differences between the open link and online panel samples can be found in the appendix.
- This sample was screened to ensure relevant respondents – riders who had ridden a motorcycle and/or scooter/moped within the last 6 months at least, reflecting a cohort of riders who had recently participated in the activity.

Passenger Sample (n=161)

- Passengers must have been a passenger on motorbike, moped/scooter in the last 6 months and not qualified for the Rider Sample.
- All respondents were sourced from an online panel provider.

Driver Sample (n=948)

- Drivers of cars and/or trucks, who were *not* motorcyclists or scooter riders or passengers in the last 6 months, all sourced from an online panel provider.

Comparison between the current data to the findings of 2012 was an original intention of this study, however some limitations with the previous sampling approach (as detailed in the 2012 report) led to the refinement of sample definitions for the 2023 quantitative survey. As such, there is less focus in this report on comparing differences or shifts in the data between the two time periods, and where comparisons are made these should be considered in the context that different sampling approaches have been applied.

Weighting & Segmentation

Additionally, to ensure representativeness of the sample, weighting was applied to the rider sample by age and gender. Gender weighting was applied according to the proportion of licence holders by gender, while age weighting was applied to reflect the proportion of younger riders in the 'active riding' cohort represented by the sample criteria (riding a motorbike in the last 6 months). Weighting was also applied by age and gender to driver sample, using proportions from the number of registered car licences in NSW. More information about the weighting scheme used and its rationale is available in Appendix A.

Sample Constraints & Limitations

As with all methodological approaches of this nature, there were limitations to this study relating primarily to sample frame and representativeness. While best efforts were made to capture and weight a sample of respondents that represented the active and recent riding population in NSW, there were inevitably limitations to the statistical and research inferences made to inform this study's key recommendations.

- Self-reported behaviours and attitudes: The collection of quantitative and qualitative data relies on self-reporting from respondents which introduces a degree of bias and framing issues. This is mitigated by the design of the questionnaire (informed by extensive qualitative research to be written in the language of our respondents), and the sampling power of the quantitative measurements. The clear benefit to this approach however, is the type of data collected (attitudinal, perceptual, psychographic) is not typically accessible using other instruments.
- Limited sample in certain sub-groups of interest – due to sampling constraints, such as the difficulty of recruiting the relevant NSW audience, certain subsets of the dataset necessitates caution when interpreting results. In particular, below are some broad characterisations of the differences between certain sub-groups of interest and the wider rider sample:
    - First Nations riders (n=79): Riders who identify as Aboriginal/Torres Strait Islander – there are indications that riders who identify as First Nations are more confident than other riders without protective clothing (T2B confidence 31% vs. 17%) or while fatigued (27% vs. 13%), with a higher likelihood to riding with their heart rather than head (40% vs. 22%).
    - Novice riders (n=124): Riders on a learner or provisional rider licence are significantly less confident in conditions that other riders are typically more confident in – in particular, riding in the dark (35% vs. 57%), on unfamiliar roads (22% vs. 49%), in wet weather (23% vs. 46%), and on poor road surfaces (24% vs. 34%)
    - Delivery riders: Qualitative research with occupational riders such as delivery riders showed a high proportion of CALD respondents, often with English as a second language. There were practical roadblocks to including this audience in the quantitative sample, perhaps due to language barriers, and general incidence rates on online panels. Due to the difficulty of reaching this audience and the limited number of them in the sample, delivery riders were not explicitly

segmented in the segmentation model. However, a base of quantitative data was established by isolating respondents who rode as part of paid employment on mostly public roads in metro areas – this amounted to a group of n=39 such riders. As a result, the "Occupational Riders" segment is primarily built from qualitative insights.

Terminology

This report uses the following terms consistently:

- "Rider" – to mean those who rode a motorcycle and/or scooter/moped in the last 6 months.
- "Motorcycle" – is an overarching term referring to all types of motorised bikes, including mopeds and scooters, for which you require a rider licence to operate. Where the distinction is relevant, "motorcycles" and "scooters" will be used.

Key Insights & Implications

Attitudes, motivations, and behaviours

Riding is interlinked with a riders' social identity

Riders have a strong sense of connection and affinity to their motorcycle with more than three quarters (79%) who claim they would be *devastated* if they could never ride again. Riding is more than just a form of transport; over half of riders (56%) like it when people know that they ride a motorcycle highlighting how the activity is interwoven into a rider's social identity. Additionally, riding has the ability to make riders feel alive and allows them to express parts of their personality which they temper in their day-to-day life. Over a third (36%) agreed that they are a completely different person when they ride (**Figure 1**).

> *"[I feel] Confident, in charge, responsible and solitude. Like no one can get to me. I don't have a mobile phone attached to me, like to my helmet or anything, so the whole world is just not there. But also responsible because you're the one making the decisions to put yourself in different scenarios. I feel [in control] because I've got the capacity to just open it up and go. If you find yourself in a pickle, you see something unfolding, there is a lot of power on tap just to move out of the way very quickly...So that sort of feeds out from the responsible side of it where I'm confident in my actions and in my riding to be able to keep myself safe on the road. And yeah, that just translates through."* ***Regional Rider***

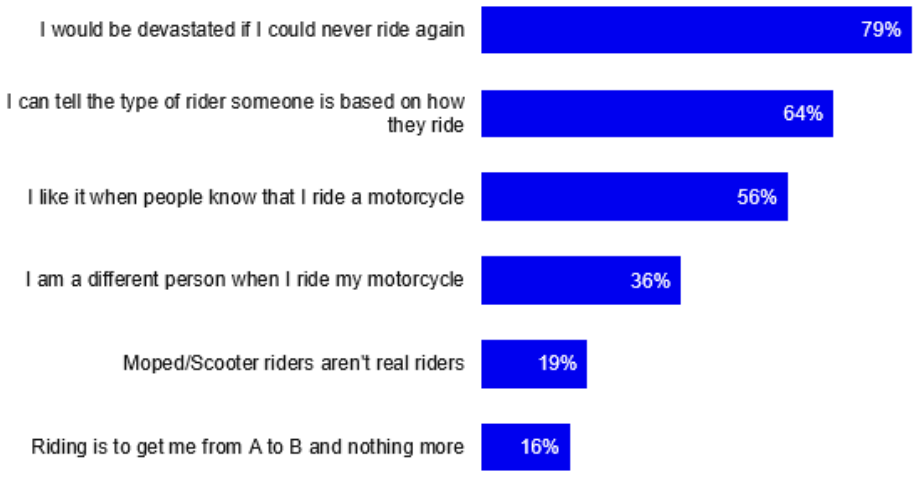
This link to identity is amplified by the strong sense of connection that riders feel towards other riders. A sense of belonging is driven by shared passion for the activity, mutual respect among riders, and for many actively engaging in the rider community (for example, riding with others, being part of a social riders' groups, being members of motorcycle social media pages, and engaging with members of the riding community for riding information or recommendations).

> *"You sometimes get a nod from other riders when you're out on the road. It's an acknowledgement like 'hey, enjoy your ride'."* ***Hobbyists and Enthusiasts***

Where there are differences across riders in the type of motorcycle they ride or the 'type' of rider they are, this was found to be a point of interest and discussion, rather than being a segue for division and elitism. By way of example, there were fairly robust levels of disagreement that scooter riders are not real riders (57% disagreed and only 19% agreed with the statement) (**Figure 1**). Qualitatively, it was clear that while scooters are viewed as a different type of machine, with a smaller engine capacity etc., scooter riders are still riders. Scooters can also act as a gateway into the field, with scooter riders claiming to get the 'bug' and progressing to larger motorcycles in order to 'power up'.

> *"At the time I was sitting in traffic going to work every day. And so, I went and got my licence, and I started riding. But soon found that what I had was pretty underpowered, 60 kilometres an hour downhill with a tailwind. And then I moved up to a Honda, little Honda 125. And then I moved up to a Honda Spacy, which I had for about 15, 20 years."* ***Commercial Rider***

Figure 1: % Agree (agree/strongly agree) with identity and affiliation statements



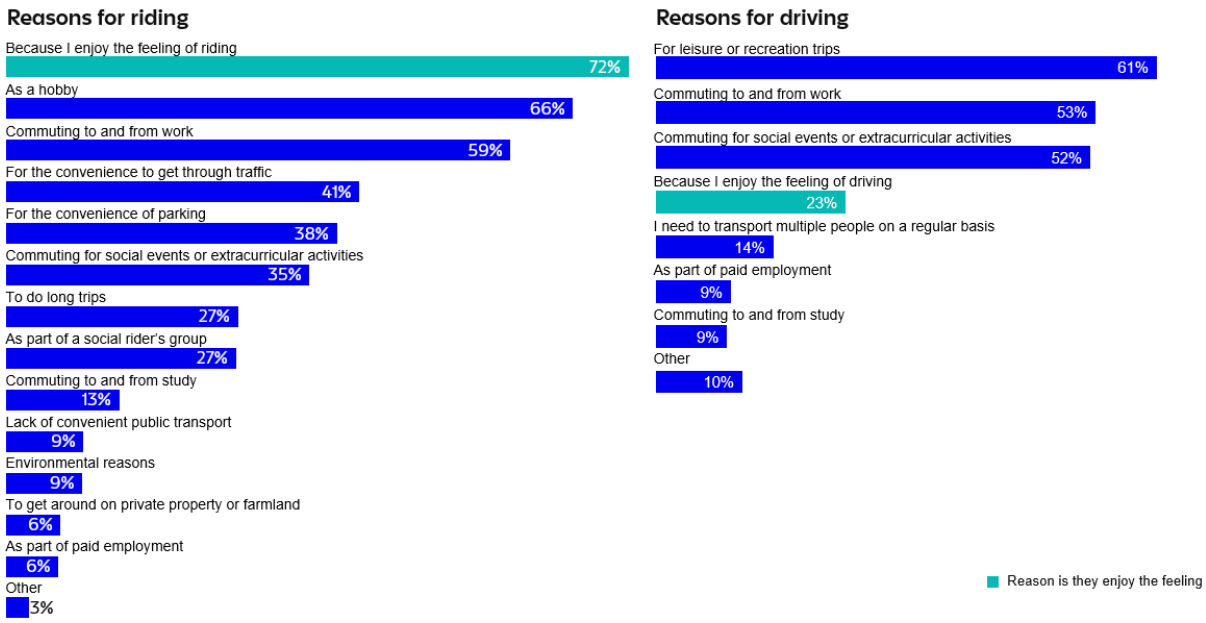
Base: Rider sample (912)
B1. To what extent do you agree or disagree with the following statements?

Implication for TfNSW: *The latent and residual stigma that riders feel means that they are sensitive to how they are perceived, particularly by drivers. The implications are that riders identify as a part of an unofficial rider community and as such, trusted voices are those within the community.*

Riding meets a number of needs, ranging from basic through to psychological fulfillment

For most of those who ride, their motorcycle is more than just a functional form of transport. A clear example to demonstrate this is that when the rationale for riding is compared with the rationale for driving, underlying motivations were completely different. For those who ride, there was a strong emotional connection with enjoyment the driving factor behind their engagement (72%). When this is compared to drivers, functional uses were the main motivation and the rationale linked to enjoyment was much lower (23%)(**Figure 2**).

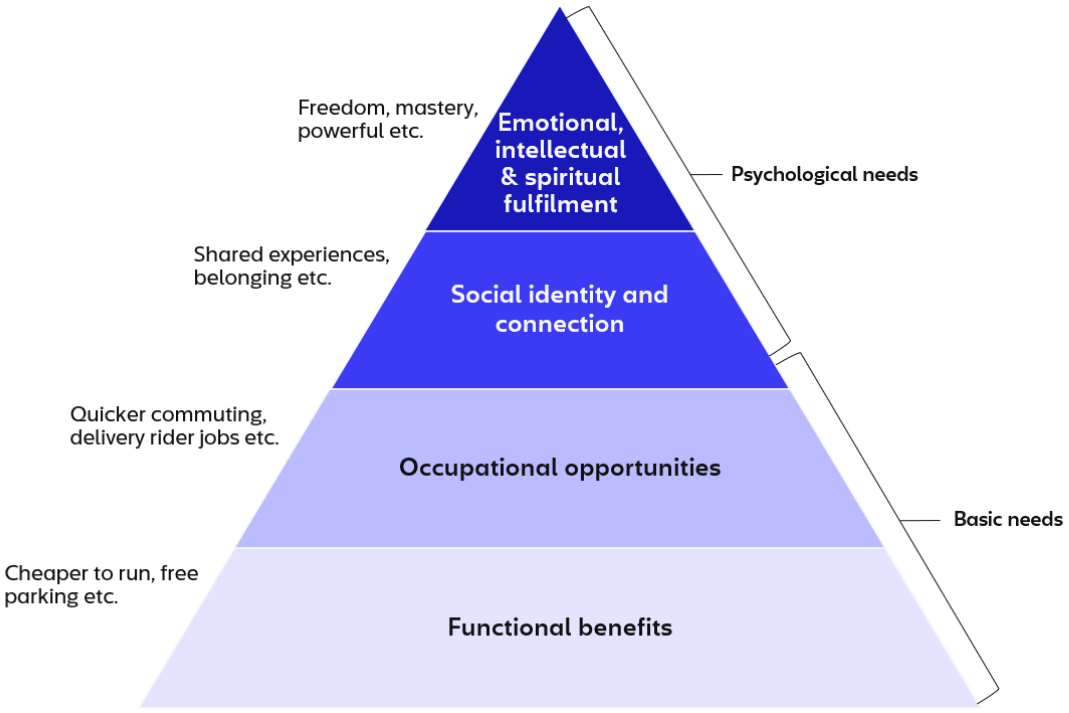
Figure 2: Reasons for riding vs reasons for driving



Base: Rider sample (912). A5A. Which of the following is a reason for you to ride your motorcycle/moped/scooter?
Base: Driver sample (885). H4. What are main reasons you drive?

The complexity of needs that are met through riding tends to increase with commitment and experience (**Figure 3**).

Figure 3: Needs hierarchy for riders



Functional benefits:

At the most basic level, riding is a functional form of transport. Motorcycles were seen to have a number of functional benefits, above and beyond other forms of transport including cost-wise as they are cheaper to run, including lower costs for fuel, insurance, and maintenance. Motorcycles were also regarded as highly convenient for commuting as they allow riders to bypass queues and are free to park in most workplaces. They were also seen as a more sustainable mode of transport compared to other vehicles due to their lower fuel consumption.

> *"I suppose it started off a cheap way to get around. I started off on the Kawasaki 250. Just an easy way to park. Good to get through traffic."* ***Metro Commuter***

Occupational opportunities:

Owning a motorcycle can also provide riders with a sense of security by expanding their employment opportunities – another basic need. Consultations revealed that this could either be for the purposes of commuting to work or as serving a more central role, such as employment as a delivery driver. Riders claimed that motorcycles provide individuals with the freedom and opportunity to work as part of the gig economy, around other responsibilities like study and children.

> *"I've been riding for four years now. So I started riding in 2019. And it's the small scooter, it's Honda PCX 150. Yeah, I drive it for Uber delivery and now I ride it to my workplace as well."* ***Commercial Rider***

Social identity and connection:

As time passes, riders reported a more intense connection to their motorcycle and their identity as a rider resulting in fulfillment of some higher, psychological needs like belonging and connection. Whilst not all riders are part of an official motorcycle club (45% were part of an official association, compared to 9% in 2012[1]), riders felt a strong affiliation to other riders due to their shared experiences on the road. This results in an unofficial rider community, who look out for each other.

Emotional, intellectual and spiritual fulfilment:

Also fitting within the psychological needs category, riding was found to fulfill a number of esteem needs. In addition to riders feeling a sense of freedom and independence on their motorcycle they reported that it also allowed them to feel in-control and powerful. For those who engaged on long leisurely rides, riding was described as a meditative experience, where riders could tune into the sensory experience and disengage and distance themselves from worries in their day-to-day life. Riding also elicited feelings of accomplishment as riding skills were mastered and technical knowledge expanded as a part of maintaining their motorcycles.

> *"Riding takes my mind off things. So I'm at peace on my bike. I know my bike, it's the third Shadow I've had for so long, so I'm comfortable on it. As I said, I'm still aware, I'm always aware on the bike... but it just gives me peace."* ***Hobbyists and Enthusiasts***

Implication for TfNSW: *Riding, and being seen as a rider, is important as it meets a number of functional and psychological needs. The themes of identity and riding culture are resonant across riders and could be explored in the development of future communication campaigns.*

[1] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

Risk perceptions when riding

There is an understanding that riding comes with inherent risks and feeling vulnerable on the road

Consistent among riders and drivers was a perception that riding is, by nature, a risky activity. Cars and bicycles were not seen as having the same inherent risks and were thought of as 'safer' alternatives – cars because of the layer of protection the shell of the vehicle offered, and bicycles because of the lower travelling speeds, lack of engine power, and dedicated bike lanes. Despite the association riding had with risk, riders were found to be undeterred. Rather, they expressed unwavering acceptance of the risk and cited that it is "part of riding".

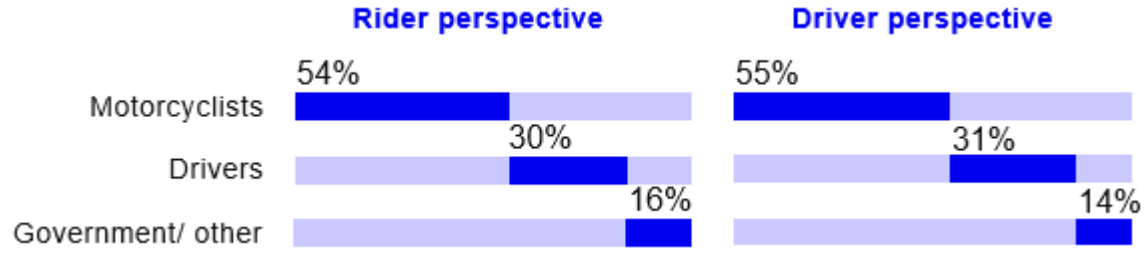
> *"You don't get on a bike without thinking it's at least a little bit risky. For me that's part of the excitement."* ***Hobbyists and Enthusiasts***

Riders linked the inherency of risk to how exposed they felt on the road often describing there being nothing between them and their surroundings. This led to strong feelings of vulnerability, with over 7 in 10 (72%) claiming that riders are always the most vulnerable traveller on the road. Drivers also acknowledged the fragility of riders and held a shared belief that in the event of an crash a driver would always come out better off than a rider.

> *"When you're in a car you're essentially in a protective metal box. On the bike all that is between you and the road is what you're wearing yet you're travelling the same speed as other vehicles. You can feel and sense everything when you're riding – air, temperature, the road."* ***Metro Rider***

In accepting their exposure on the road, riders expressed ownership over the role they had to play in their own safety, with 2 in 3 (65%) believing how safe they are on the road is up to them. Sentiment among drivers was similar with 3 in 5 (61%) drivers believing riders are responsible for their own safety. However, across both audiences, there was a perspective that this responsibility did not lie solely with riders. There was consensus that as mutual users of the road both riders and drivers needed to look out for one another and behave in ways that did not put others at risk. Additionally, Government and associated agencies (such as law enforcement, local council) were identified as taking a share of the responsibility for riders' safety through regulation, road maintenance, and policing (**Figure 4**).

Figure 4: % Parties responsible for riders' safety



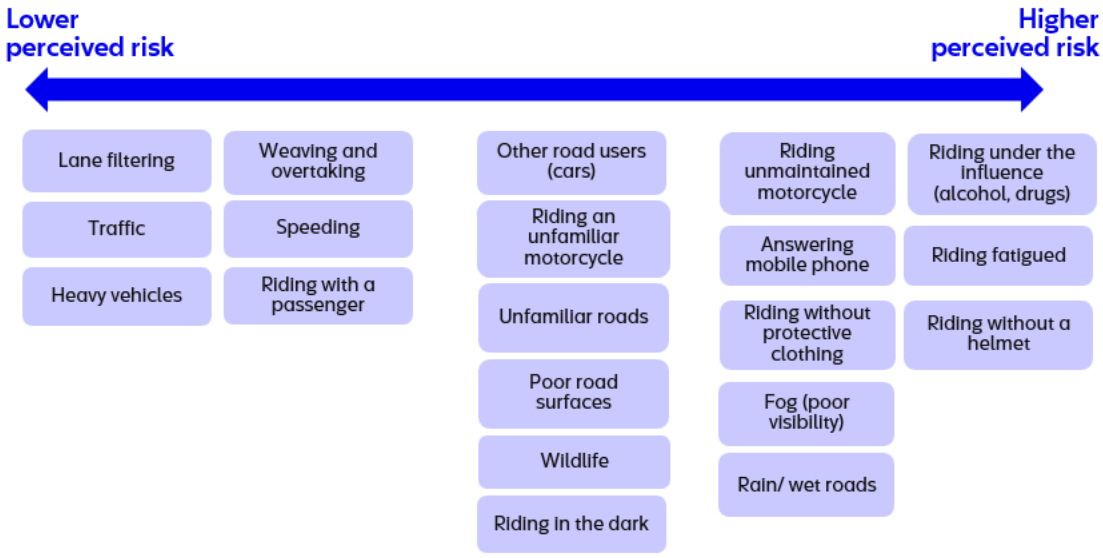
Base: Rider sample (912) C8. To what extent do you think each of the below parties are responsible for the safety of motorcyclists?
Base: Driver sample (885) J8. To what extent do you think each of the below parties are responsible for the safety of motorcyclists?

Risks are seen on a continuum – how risks are perceived influences how riders respond and how far they will push the boundaries

Qualitative consultations revealed that riders see risks from multiple angles and sources – environment risks (weather, location, surrounding setting, time of day), road risks (other vehicles and road users, traffic, animals, road conditions), motorcycle risks (maintenance,

familiarity), and rider risks (mental and physical state of the rider, behaviour of the rider, passengers). Whilst many dimensions of risk were identified, the extent to which riders saw these as risky varied (**Figure 5**).

Figure 5: Riders' perception of risks



Qualitative consultations and quantitative survey
Base: Rider sample (912)
C1.To what extent do you agree or disagree with the following statements C2. Please rate how confident you would be riding your motorcycle / moped / scooter in the following conditions?

Higher risk

Factors that were perceived as higher risk were those that riders claimed could easily disrupt their balance or impair their visibility whilst riding and thus increase their likelihood of a slide (for example, being fatigued, riding under the influence of alcohol or drugs, answering their mobile phone, riding in fog or heavy rain, an unmaintained motorcycle) and those that made them feel more exposed on the road (for example riding without a helmet or any protective clothing). This was reflected in the situations that riders felt least confident riding in with over half of riders reporting no or low confidence (**Figure 6**). These factors have remained a mainstay of riders' perception of risk with riding under the influence of alcohol and riding while fatigued the top two highest risk situations reported in the 2012 study.

Implication for TfNSW: *Existing alignment between riders and drivers that the safety of vulnerable road users is a collective effort provides a foundation of common-ground on which to promote safe road interactions towards other vehicles in a way that does not elicit animosity between groups.*

For situations considered higher risk, the typical response from riders was to avoid putting themselves in a position where they would feel compromised or have to navigate those risks. A majority of riders drew firm lines at never taking drugs before riding, never drinking alcohol before riding, and never answering their mobile phone while riding. These boundaries were present in 2012, whereby 80% of riders agreed that they would never drink any alcohol at all before riding a motorcycle.[2] Some riders also drew boundaries avoiding roads with poor

[2] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

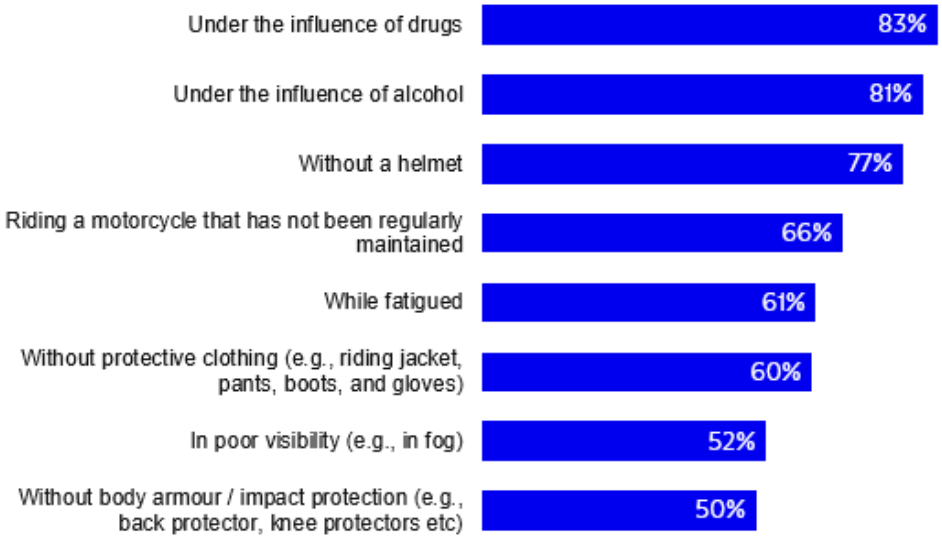
surfaces and avoiding riding in bad weather, however many said that this was not always feasible, particularly among those who rode regularly to commute or for their occupation.

Where for riders, the highest risk factors were internally focused, passengers felt most unsafe in situations where the experience of the ride was likely to disrupted by external conditions – the top 3 concerns for passengers were wet weather (66%), poor road surfaces (62%), and poor visibility (51%). This suggests passengers perceive themselves as giving up control of the ride, leaving it up to their rider to worry about other factors, and this is reflected in the level of trust placed in their rider, with 83% of passengers rating their main rider's skill level at a 7/10 or above.

Moderate risk

Factors perceived as moderate risk were characterised by riders as 'external' factors that had an element of unknown to them and a degree of unpredictability such as other road users (for example, cars, trucks, pedestrians), unfamiliar roads, riding an unfamiliar motorcycle, or wildlife on the road. It was the perspective of riders that accommodations could be made when riding to reduce the level of risk these factors posed to them – such as being alert when riding and riding with caution. Whilst these situations were of concern to a majority of riders (for example, 69% were concerned about the inattention of drivers), there was a higher level of confidence riding in these situations compared to those considered higher risk.

Figure 6: Situations riders reported lowest levels of confidence riding in (% not at all/not very confident)

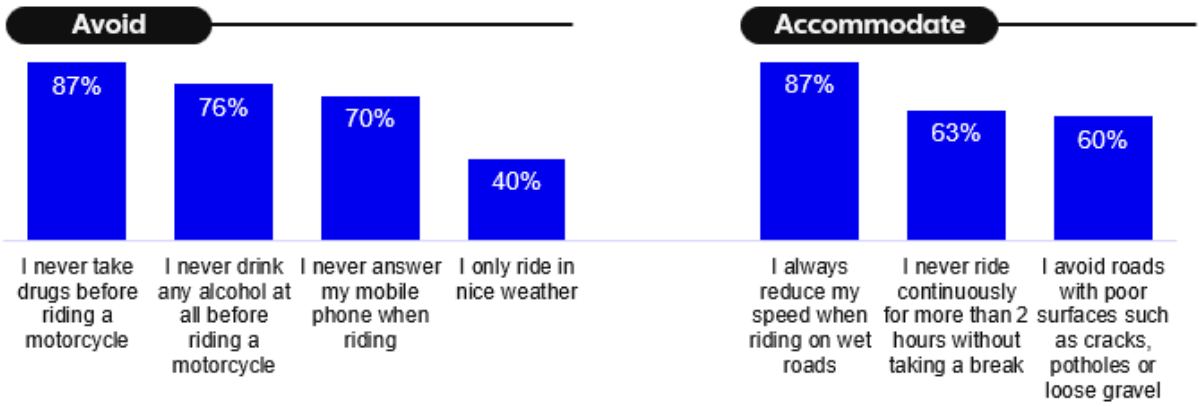


Base: Rider sample (912)
C2. Please rate how confident you would be riding your motorcycle / moped / scooter in the following conditions?

Riders acknowledged that there were situations where it was not always practical to avoid completely, and instead took the approach of modifying their riding behaviour or making accommodations to increase their control over the situation. This included slowing down when riding in wet conditions, taking alternate roads to avoid those with poor surfaces, and taking

breaks if riding for more than 2 hours. This was consistent with riders in 2012, whereby 91% reported that they always reduced their speed when riding on wet roads.[3]

Figure 7: % Agree (agree/strongly agree) with the following statements



Base: Riders sample (912)
C1. To what extent do you agree or disagree with the following statements?

The

Lower risk

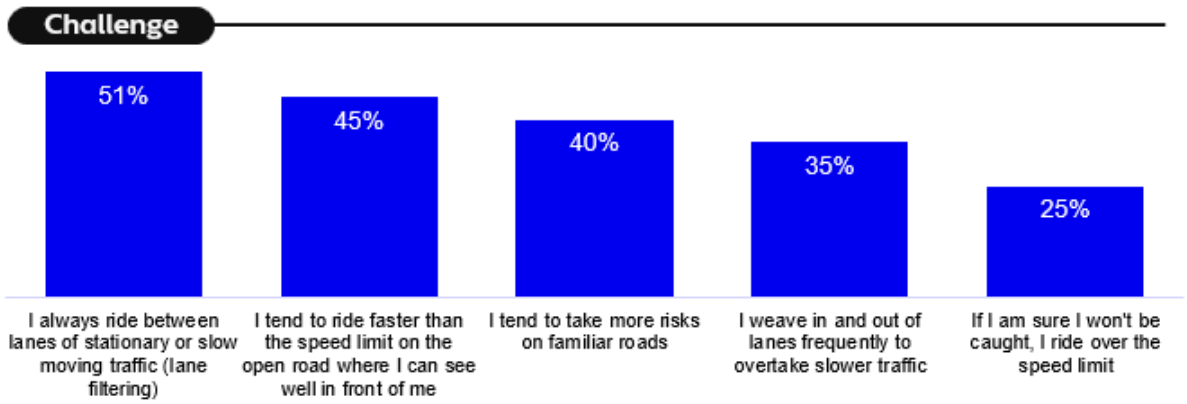
Factors considered as having lower risk included riding in traffic or among heavy vehicles, lane filtering, speeding (in certain conditions or over the speed limit), weaving and overtaking. Riders did not dismiss the risk associated with these factors, however the extent to which they posed a risk was claimed to be in the hands the rider with most believing that riders could minimise their risk if they had the necessary skills do these behaviours or were familiar with their surroundings. Riders expressed high levels of confidence riding in these situations, mirroring the belief that they have control in these situations (77% somewhat to very confident riding amongst heavy vehicles, 74% somewhat to very confident riding 5-10km over the speed limit, 74% somewhat confident to very confident lane filtering, 65% somewhat to very confident weaving between lanes to get ahead).

In situations riders perceived as lower risk (due to feelings of control) some were found to challenge these boundaries and take liberties with their riding behaviour. For example, riders were found to exhibit greater permissibility riding over the speed limit, overtaking, and weaving. Riders further pushed the boundaries and made active decisions to engage with these behaviours on familiar roads or when they felt they had space on the road to do so (for example, open roads or clear roads).

> *"As with anything to do with riding there is some risk, sure. But if there's an open road it feels so good to gun it a little. You can feel it if you're pushing it a bit too far and you have to be like ok woah slow down… everyone has their own limits and you stick to them as the last think you want is to be out of control. That's when it's dangerous for you and everyone else."* **Metro Commuter**

[3] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

Figure 8: % Agree (agree/strongly agree) with the following statements



Base: Riders sample (912)
C1. To what extent do you agree or disagree with the following statements?

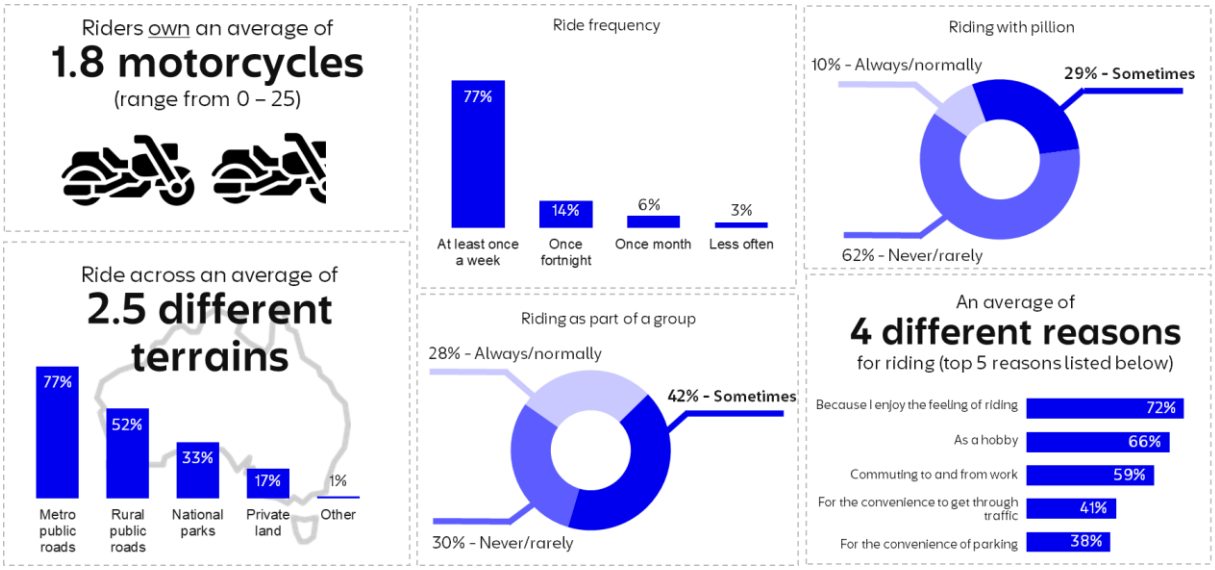
Whilst it was common for riders to take these approaches in the respective situations, qualitative consultations found that these were not fixed – riders were adaptive in their behaviours aiming to maximise the control they felt in any given situation when riding.

Implication for TfNSW: *Implication for TfNSW: Speeding, weaving in and out of traffic, overtaking, and lane filtering are widely accepted behaviours among riders and there is strong evidence to show that normalisation of these behaviours has resulted in permissibility. It was observed that this permissibility led to the gradual sliding of boundaries and shifting risk perceptions – for example, speeding 5km over the speed limit was not seen as risk, however 15km over the speed limit was. Recalibrating these perceptions is a tall order as a cultural shift is required to effectively undermine the entrenched beliefs of riders. Interventions that draw attention to the disconnect might be considered to address this challenge – prompting riders to actively think about the behaviour and reflect on their permissible attitude. For example, this might include social engagement experiments, campaign activations (e.g. watching footage or experiencing a simulation to guess how many kms over the speed limit the bike is travelling to highlight any disconnects between perception and reality), or riding interventions (e.g. indicator or tracking app that signals/captures every time a rider goes 5km over the speed limit). There may also be an opportunity to learn from the motor vehicle space and the efficacy of campaigns that address driving and speeding or not pushing the rules (e.g. NSW Stop it… or cop it campaign).*

Each ride is different and is mentally assigned a risk-level based on a multitude of factors

Motorcycles are not pigeon-holed for use on specific trips. Riders consider their motorcycle to be a multipurpose vehicle, used for a variety of reasons (e.g., leisure, for commuting etc.), and to travel across a wide range of different terrains (from national parks to metro roads). Who a rider rides with is also not binary nor consistent – 2 in 5 (42%) were equally as likely to ride solo *and* as part of a group, and 3 in 10 (29%) were equally as likely to ride with and without a pillion (**Figure 9**).

Figure 9: Rider behaviours



Base: Riders sample (912). QA1. How many motorcycles/mopeds/scooters do you own? A3. Generally, how often do you ride a motorcycle/moped/scooter? A4. Where do you do most of your riding? A5A. Which of the following is a reason for you to ride yo ur motorcycle/moped/scooter? A6. How much of your riding is done with others or in a group? A7. How much of your riding is done with a passenger?

This variance is important to understand as these are factors which riders consider before every ride. Riders assimilate these factors, along with environmental considerations (such as road conditions, potential traffic, and the weather) to mentally assign a risk level to each and every ride. **Table 1** provides an example of how risk is assigned and the resultant impact on behaviour before and during their ride. The below table is not intended to provide an overview of every possible factor, but it is an illustrative example of how different factors lead to different risk assignments.

Table 1: Rider risk assignment

Risk assign-ment	Conditions / environment	Rationale for risk level	Likely impact on behaviour	*Quotes*
Lower risk	Local known roads	Familiar with the road conditions and the road users	• Likely to ride with less protective gear • Lower concentration levels (on the road, other road users and surroundings) • More relaxed driving behaviours (less likely to indicate etc.)	*"If I know that I'm going to go for a quick trip, just to the shops, I just usually not worry about putting the full gear on."* ***Novice Riders***
Lower risk	Short trips	Time spent on the road will be minimal so less likely to encounter any issues	• Less likely to wear protective gear	*"If it's just you're nipping to the pub. If you're nipping to the cafe. The risk is less but it's never not there."* ***Metro Commuter***
Lower risk	Likely to be low levels of traffic / not many other road users (e.g. in national parks or could be an early Sunday morning ride when no-one else is around)	Other road users are the main reason why crashes happen – so if there are fewer road users the likelihood of an incident is lower	• Likely to ride with less protective gear • Likely to ride at higher speeds • More likely to push the limits of what's allowed (e.g. wheelies)	*"I mean, I these days I tend to keep the front wheel on the ground.* *But in the past, I went across the Harbour Bridge on the back wheel. In hindsight, not the brightest of things to do in."* ***Regional Rider***

Higher risk	Riding with a pillion	Responsible for the safety and wellbeing of another person (usually a loved one) The motorcycle will react in a different manner with two people on board	• More cautious riding behaviour – riding to speed limit • More likely to wear protective gear • More aware and attentive to road, conditions and other road users	*"When you have someone physically hanging on to your back, it's a reminder to ride safely."* ***Hobbyists and Enthusiasts***
Higher risk	Unknown roads or poor road conditions (e.g. unmaintained roads)	Unfamiliar with road layouts, road conditions and other road users	• Likely to wear more protective gear • Heightened vigilance and concentration • More considered riding style	*"If it's a road with loads of pot holes or something then you're just a bit more cautious as you don't know what to expect."* ***Novice Rider***
Higher risk	Longer trip	Will spend a considerable amount of time on the road and as such the probability of encountering an issue is higher	• Will wear more protective gear • Will take breaks to ensure no lapses in concentration	*I zoned out one day and we're about 600 kilometres from home, ended up on the wrong side of the road and dropped the bike. It wasn't bad, I was wearing all the gear as I hadn't ridden that far out before so didn't know what it would be like but I was a bit bruised and so was the bike. I just sort of went, I'm just getting too cocky."* ***Regional riders***
Higher risk	Wet conditions	The motorcycle will react differently – it will be slower to stop, harder to manoeuvre etc. May also be less visible to other road users if the rain is particularly heavy / it is accompanied by mist etc.	• Will wear more protective gear – for visibility and for protection (both from the rain and the road) • Ride at slower speeds • More attentive to conditions and other road users	*"If it's raining and you've got the right gear it can be more comfortable, but if you aren't and it starts bucketing down on you, then everything just gets soaked."* ***Novice Rider***

If higher risk factors are present with lower risk factors, for example wet conditions, but with low traffic, riders will mentally assign risk along a continuum and their behaviours will be stepped up or down accordingly. Other factors, namely convenience and comfort also play a role in specifically how much protective gear is worn.

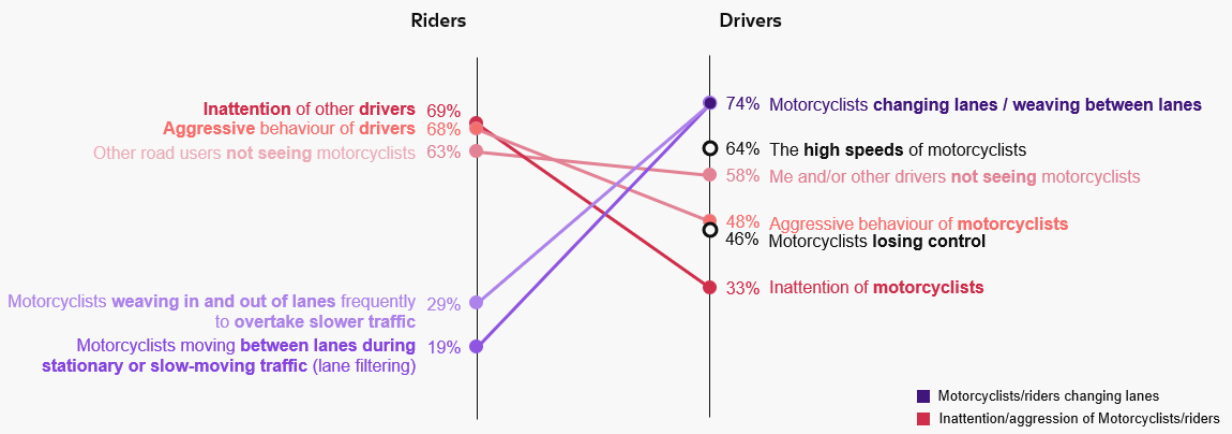
Implication for TfNSW: *There is an opportunity to reframe risk perceptions, helping riders to understand that every ride is high risk. Re-educating about risk has the propensity to drive behaviour change given that riders already alter their behaviours for riskier rides.*

There is a disconnect between how riders and drivers consider the level of risk associated with speeding, weaving and overtaking

Whilst riders saw speeding, weaving, and overtaking as lower risk, these were the leading concerns drivers had when sharing the roads with riders (74% are concerned with riders changing or weaving between lanes (ranked 1st) and 64% are concerned with riders travelling at high speeds (ranked 2nd). As shown in **Figure 10**, drivers largely interpret motorcyclists weaving between lanes, higher speeds, and motorcyclists lacking control to be significant safety concerns when it comes to sharing the road with riders, while riders are significantly more

concerned about the actions of drivers. Despite the fact that speed is the biggest factor in road trauma, for riders, there were expressions both qualitatively and quantitatively citing speed and weaving between lanes (especially in slower and congested traffic) as typical and safe (depending on the conditions) actions that can even enhance safety in the eyes of riders – for example, that moving to the front of a line of traffic, or speeding up to get away from danger is the safest thing to do.

Figure 10: Significant Safety Concerns (% of riders vs. drivers)



Base: Rider Sample (912); Driver Sample (885)
C3A. Which of the following are significant safety concerns to you when riding your motorcycle / moped / scooter?

Consultations with riders and drivers found that this disconnect was problematic on occasions where riders engaged in these riding behaviours to *increase* their level of safety on the road. There was a lack of comprehension among drivers for the reasons why riders might perform these behaviours (such as going over the speed limit, overtaking) other than to "show off" or as a sign of impatience on the road. This led to feelings of stigma among riders, half (53%) of whom say they feel misunderstood by drivers.

Drivers also held the belief that riding is a risky activity with over half of drivers of the view that riders are more likely to be risk takers in general (51% agree). Additionally, findings suggested that drivers believed that the hobby allowed and enabled riders to take risks with nearly 3 in 5 riders (58%) believing that riders are more likely to get away with breaking road rules than drivers.

Table 2: Misalignment between selected rider behaviours and drivers' perception of them

Behaviour	Rider rationale	Driver perception
Lane filtering	It is safer to be at the front of the queue in stationary or slow-moving traffic rather than amongst densely packed vehicles.	Riders are impatient and unfairly cutting the queue.
Speeding to get in front or overtake	It is safer to get to be out ahead of vehicles. Riders can use speed to get themselves out of a situation quickly where there might be danger (for example, respond agilely to a vehicle that has not seen them and cut them off, moved into their lane, or pulled out).	Riders are impatient and think that they can ride all over the road as if the road rules do not apply to them.
Loud exhaust/ revving engine	Riders are safer when drivers can hear them coming. A loud exhaust or revved engine signals to drivers and gets their attention.	Riders are showing off.

Source: Qualitative focus groups with riders; Qualitative focus groups with drivers

> *"So one thing that I advocate for, and a lot of my neighbours don't like it, is having a bike that's loud and can be heard. As much as other people don't believe it...that is a safety feature itself. So I can see people looking around for me, even though they can't see me in their mirrors, they can hear me and they're looking around and they'll do a double take before they actually make a change of lane or so on."* ***Regional Commuter***

Universally, riders were of the view that riding a motorcycle makes you a better driver. It was their perspective that through riding a greater level of awareness and appreciation for other road users (particularly those more vulnerable and exposed, such as motorcyclists and cyclists) is learnt. Drivers, however, did not share this perspective (10% agree that people who ride motorcycles are better drivers) further highlighting the lack of understanding or consideration for the riding experience.

> *"It's not until you've ridden a bike do you understand what it's like. Like a car might think you're really close to them, but on the bike, you know you have a lot more space and are further away than they think. It's a level of awareness that you get from riding and being able to see so much more on the road and reading it."* ***Metro Commuter***

Implication for TfNSW: *Whilst there is low animosity between riders and drivers (only 16% drivers say they get annoyed when riders are on road), a lack of understanding among drivers for why riders conduct themselves in certain ways on the road contributes to riders feeling stigmatised and drivers frustrated. There could be a role for education among drivers to close the gap in these areas of misunderstanding to allay tensions and promote respect. Transport for NSW is considered a credible and welcomed voice for communicating information to drivers about sharing the road and the safety of motorcyclists (91% would prefer to receive communications on this topic from TfNSW).*

Whilst drivers hold misconceptions about rider behaviours, there is evidence that some of the outdated riders stereotypes are fading

There is a residual perception among drivers that riders think that they are invincible (43%) however, the research found that this might be starting to shift in a more positive direction. Generally, drivers do not see riders as a homogenous group (64% do not see riders as all the same) and they are seen as a distinct group from other road users such as cyclists (65% do not see them as the same). This is further evidenced by the fact that drivers assess riders based on their individual actions when they interact with them on the road. For example, drivers make the time to individually appraise each rider based on what they are wearing (80% agreed that they feel more comfortable when they see a rider wearing all of their protective gear) and also their riding behaviours (53% agreed that skilled riders are less likely to get into a crash and 47% agreed that they can tell the type of rider based on how they ride).

However, riders remain somewhat sceptical with half (53%) holding the assumption that riders have a bad reputation among drivers. This revealed an underlying concern of many riders for how they are viewed by the community. It was the sentiment of riders that whilst the majority of riders do not behave in ways that would fuel negative perceptions in the eyes of drivers, it is the few who ride recklessly or take on 'unnecessary risks' who tarnish the riders name (76% of riders believe that certain groups of riders give all riders a bad reputation). Given the sense of affinity and identity many riders have with the activity, it was unsurprising to observe riders take judgements of the riding community to heart and express a desire to act in ways that do not give drivers any reason to think poorly of them.

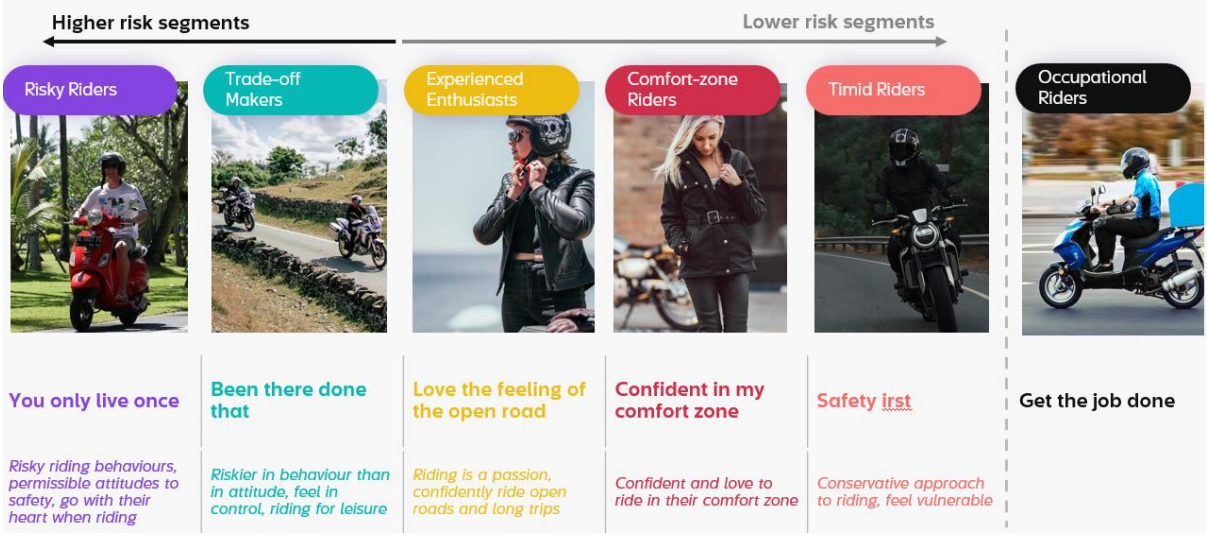
> *"It's the few that give us a bad rep. I even hear it from some of my mates who moan when they see a motorcycle in their side mirror… because drivers already assume the worst of us*

it's not worth giving them any more reasons to get annoyed or aggressive with us on the road." ***Metro Commuter***

Implication for TfNSW: *Riders' care for how they are perceived and the sense of responsibility they feel in helping to uphold a positive reputation for the riding community could be a powerful motivator for behaviour change. This may include messaging that speaks to 'doing your part', 'it's every rider's responsibility', or 'the way we act on the road affects the way we are treated by others'.*

Motorcyclist Segments

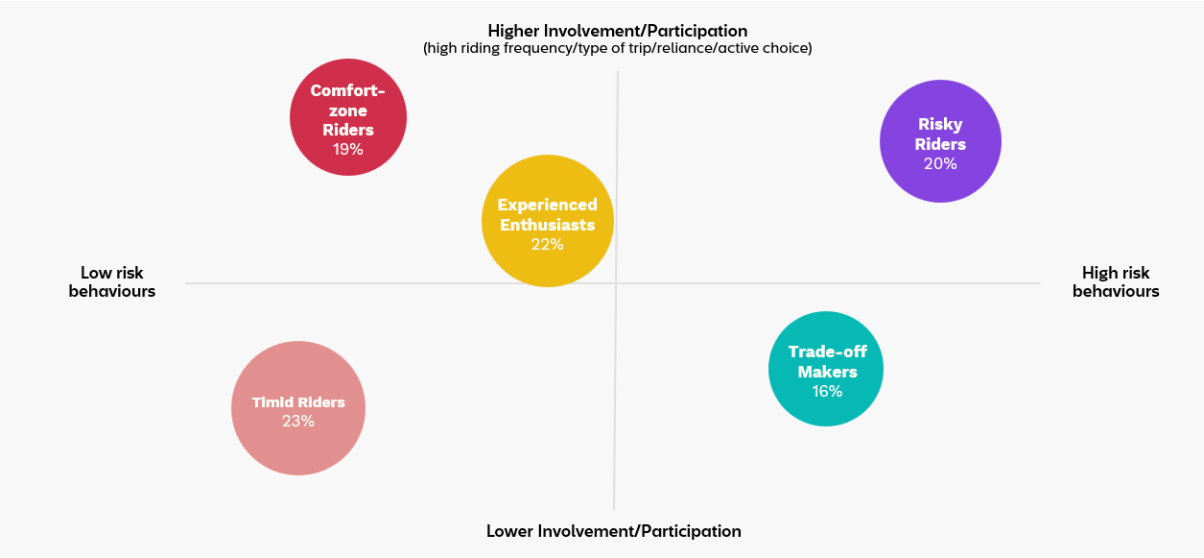
The research identified six segments of motorcyclists who each hold a different set of attitudes, beliefs, behaviours, and risk profile to riding



Overall, segments were differentiated by risk taking behaviours and the extent to which they are involved with the activity (**Figure 11**). Risky Riders and Trade-off Makers are characterised by riders who exhibit greater propensity for risk taking behaviours, whereas Experienced Enthusiasts, Comfort-zone Riders, and Timid Riders were found to be more conservative in their risk appetite. Segments with higher category involvement (as determined by their riding frequency, types of trips they take, level of reliance on their motorcycle for transport, and willingness to engage with the hobby and choosing to ride) included Comfort-zone Riders, Risky Riders and Experienced Enthusiasts, with Timid Riders and Trade-off Makers lower in their involvement.

The qualitative research also revealed Occupational Riders as a segment of riders and informed their characterisation, however this segment was not validated in the quantitative segmentation. A leading reason for their exclusion was due to the prominence of riders who primarily speak a language other than English within this segment which precluded their participation in the survey. As such, a Segment Bible has been developed for Occupational Riders based on the qualitative insights, but they are not detailed in the perceptual map below or commented on quantitatively in the report.

Figure 11: Segment Perceptual Map



Full details, including demographic profiling is provided in the Segment Bibles in the Appendix of this report.

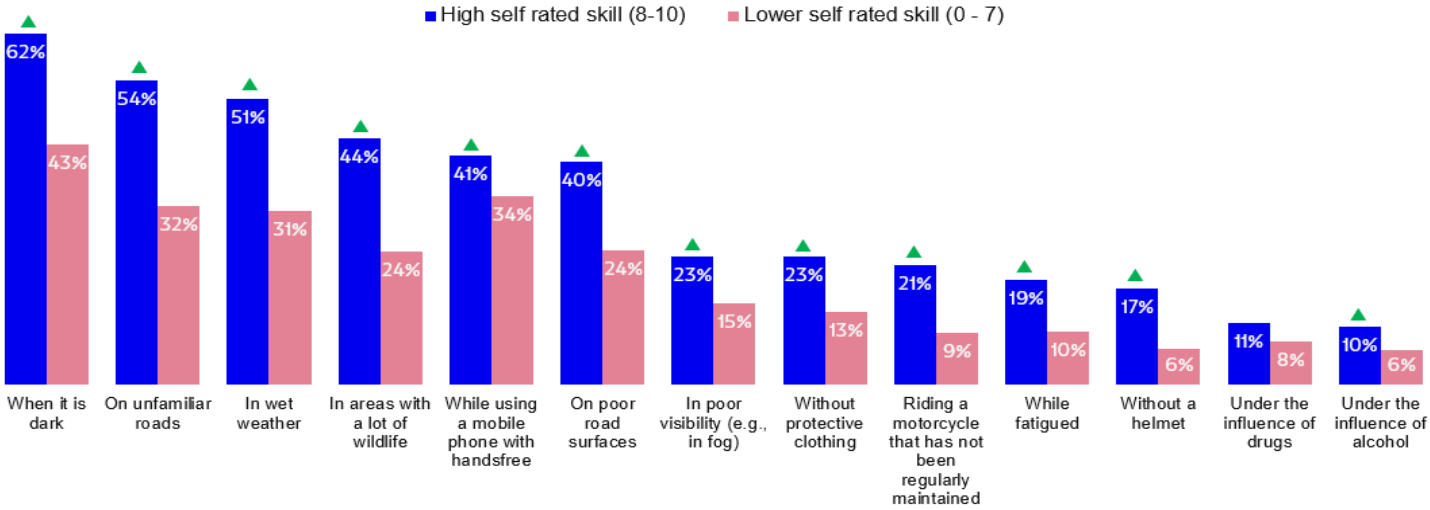
Implication for TfNSW: *The remainder of the report explores the topics of risk taking, safety, protective gear, and communication needs through the lens of these segments to inform targeted interventions and strategies to engage different audiences within the motorcyclist community and encourage safe riding behaviours.*

Risk-taking behaviours and safety concerns

Overconfidence leads to inadvertent risk-taking, through an underestimation of risk associated with certain situations

Those who consider themselves more skilled were consistently more confident riding in conditions that are considered high risk (qualitative findings indicated that self-perceived skill does not necessarily equate to tangible skill on the road). Respondents were asked to rate their confidence riding their motorcycle/scooter, in different situations, from "not confident at all" (1) to "very confident" (5). Those who consider themselves less confident (1-2) on average rated themselves lower in skill compared to those most confident (4-5). The only exception to this was "riding 5-10km/h above the speed limit", suggesting that this is an action with equal permissibility across skill levels, with 74% of riders saying they feel at least "somewhat confident" doing this. Qualitatively, riders reported that speeding up in certain circumstances to be the safest reaction to regain control in an unsafe situation; usually situations that involve car drivers and having to merge lanes. **Figure 12** showcases that riders who gave themselves a skill rating of 8-10 are significantly more confident riding in almost all situations that are perceived as high risk, when compared to those who gave themselves a skill rating of 0-7. Qualitatively, it was reported that riders are more likely to ride when they are confident in the situation. Hence, it is evident that overconfidence leads to permissibility of riding in risky circumstances, increasing their exposure to risk.

Figure 12: % Top 2 Box Confidence riding in certain conditions by self-perceived skill



Base: Rider Sample (912); High self-rated skill (522); Lower self-rated skill (390)
A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being an expert; C2. Please rate how confident you would be riding your motorcycle/moped/scooter in the following conditions
▲▼Indicates a significant difference at a 95% confidence level between groups

Confidence in risky situations is driven by a perception that the risk can be overcome by the necessary skill and experience. As such, riding to conditions safely was a matter of experience and skill.

> *"As I say, people say, "What if you come off?" Well, I don't come off because I know that I don't think that. I know that I can... there's obviously certain situations that none of us can avoid. Such as if you're going across a two intersection, a car's speeding across, no one can avoid that no matter how prepared you are. But I feel that I've had enough experience with every sort of situation otherwise that I can take precautionary action to avoid it."* ***Metro Commuter***

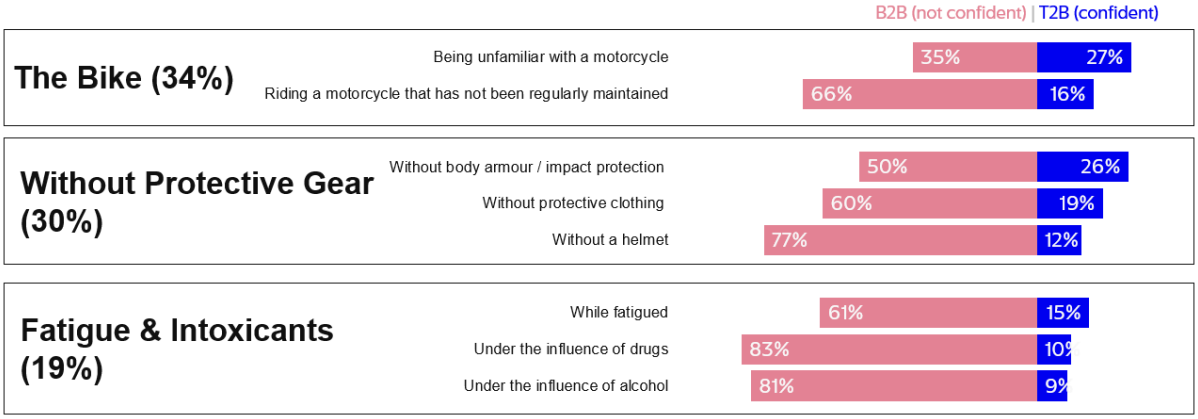
Whilst those with high self-perceived skill are more confident in a range of risky situations, confidence does diminish for all riders when it comes to factors outside of their control

In contrast, much less confidence was expressed when it came to factors outside the boundaries of skill – no amount of skill can overcome a motorcycle that is potentially poorly maintained or that you are unfamiliar with **(Figure 13)**. Encouragingly, confidence without protective gear was also considered a factor to be treated with a strong level of caution. This came from a strong sense that crashes were somewhat unavoidable regardless of skill, and the inherent vulnerability of the rider on the road is a constant theme – it doesn't matter whose fault it is, the rider will always be worse off. In this way, the conversation around protective gear sidesteps a conversation about skill, and preparing for the event of a crash becomes the only factor that the rider can control prior to riding.

> *"I think you should always dress for the slide anyway because you never know what's going to happen."* ***Hobbyists and Enthusiasts***

Similarly, riding with fatigue or under the influence is widely considered taboo amongst riders, with very few citing confidence under these conditions.

Figure 13: Confidence levels in various situations (scenarios where riders are typically less confident)



Base: Rider Sample (912)
C2. Please rate how confident you would be riding your motorcycle/moped/scooter in the following conditions

Overconfidence is more prominent with riders that are in the formative years of their motorcycling journey

How riders perceived their own skill level reflected the confidence they had at engaging with risk-taking behaviours. Whilst self-perceived skill was generally high (91% of riders considering themselves at least a 6/10 in skill level or higher, and 56% rating themselves an 8/10 or higher), riders reported that this had fluctuated over the time they had been riding. Reflections on their past riding experience spoke about what they now consider to be an overconfident sense of ability in their early riding years, leading to behaviour they now consider unjustifiably risky in hindsight.

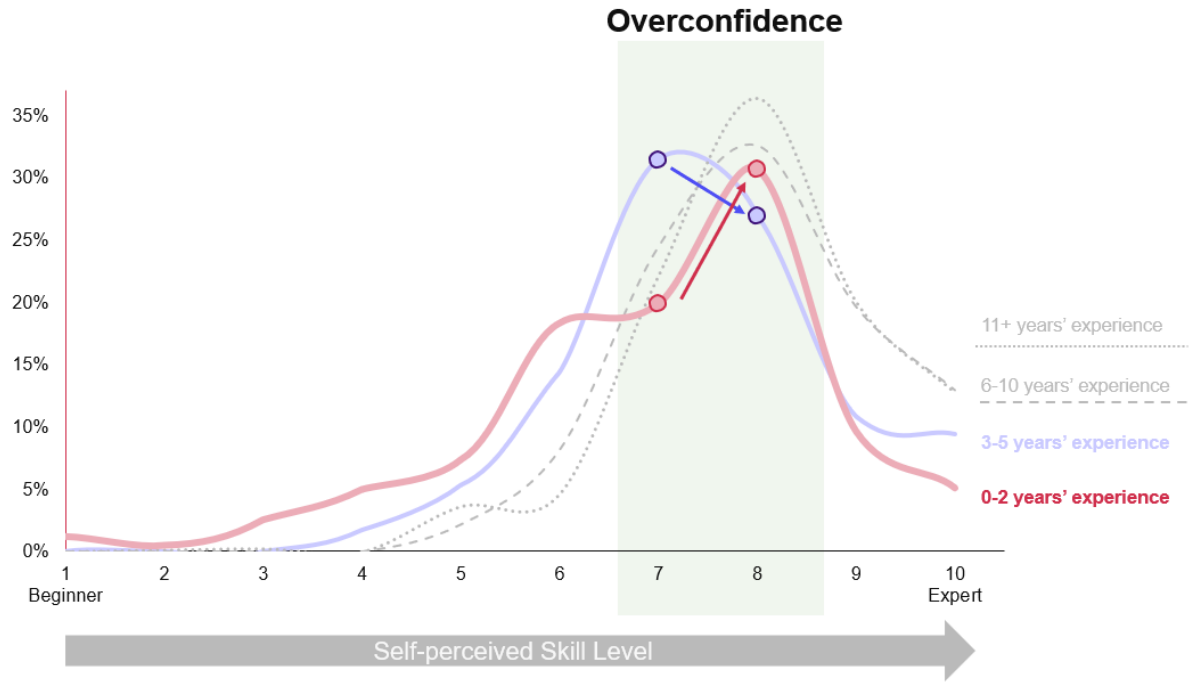
> *"Of course I thought I knew everything! You get comfortable and cocky. I shake my head thinking about some of the stuff I used to pull – that's youth and immaturity for you!"* ***Hobbyists and Enthusiasts***

In this situation, the same rider with 0-2 years' experience may (at the time) see themselves as "pretty good", and after some further experience, recognise their level to be lower – tracking this rider across time however would bear a similar result to the chart on the left – the

contemporary understanding of a riders' skill always tends to be high, even if in hindsight they would consider their less experienced self to be overestimating.

This effect is observed across the sample, with a significant subset of less experienced riders who displayed a measure of overconfidence in their ability relative to their riding experience. This is seen in the below chart **Figure 14** – the most common skill rating for those with only 0-2 years' experience is 8/10 (31% of these riders), while for those with 3-5 years' experience, it is 7/10. Going beyond 5 years' experience, self-rated skill begins to cap out, with virtually no experience effect beyond this – what makes someone think of themselves as a 10/10 "expert rider" is no longer about years of experience, but attitudes.

Figure 14: % of Riders self-rated at each skill level by riding experience



Base: Rider Sample (912); 0-2 years (141); 3-5 years (172); 6-10 years (144); 11+ years (422)
S5. How long have you held a motorcycle licence? Excluding any time on L plates.

Risky Riders are the most overconfident segment both in attitude and in skill rating relative to years of experience. With a large amount of less experienced and younger riders and relatively high self-perceived skill levels, they are a key segment for relative overconfidence, and this is further reflected in their attitudes towards risk and safety gear.

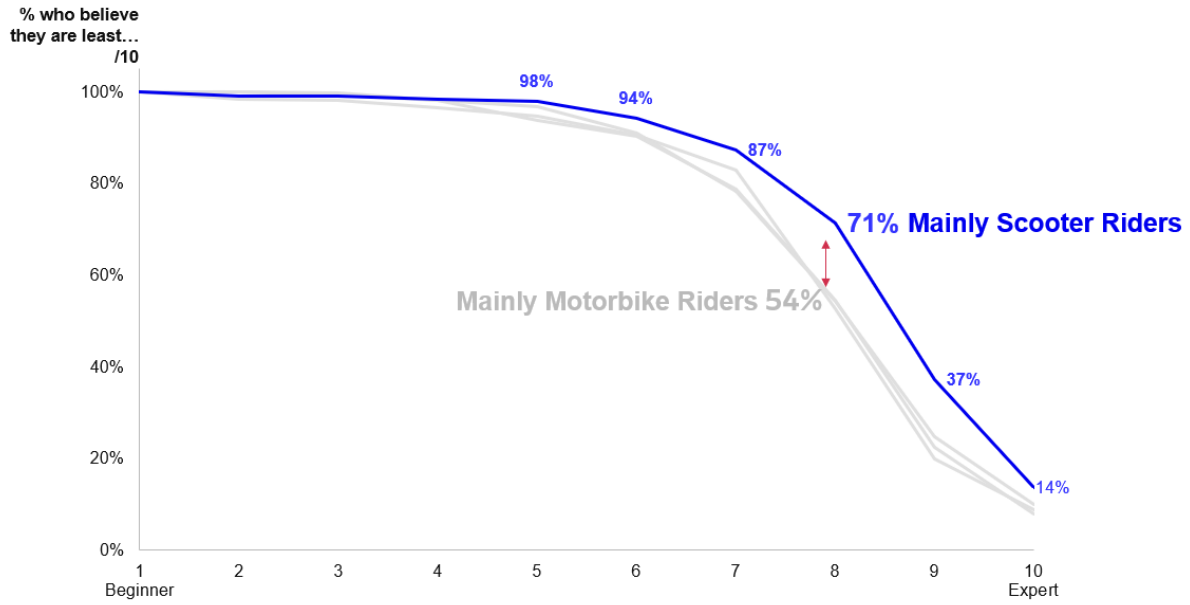
A gap in self-perceived skill between scooter and motorbike riders shows that scooter riders perceive a lower standard of mastery compared to motorbike riders, rather than being overconfident

The research found that there were different contexts to perceived skill levels for those who ride scooters/mopeds versus those who ride motorbikes. Whilst perceived skill was higher among those who mainly ride a scooter/moped (these riders were 50% more likely to rate themselves a 9 or above in skill compared to the overall sample) scooter and motorbike riders alike considered the range of skill required to ride a scooter to be narrower in scope and ability. Scooters were seen as easier to 'master' with skills conceptualised more commonly as "can ride" versus "can't ride." In contrast, motorbike riders perceived the range of possible skills to be wider, with more levels and nuance to being a skilled motorbike rider. This appeared to be related to the role of scooter riding versus motorbike riding – while scooters are thought of as a

fun and/or practical commuter, the use of a motorbike can range from daily commuting, to off-road and motocross, farm riding, to long trips. This variability contributes to the wider skill perception amongst motorbike riders.

Self-assessments of skill between those who mainly rode scooters/mopeds and those who mainly rode motorbikes also showed this effect below (**Figure 15**):

Figure 15: Self-rated Skill of main rider types (% who believe they are least X/10 skill)



Base: Rider Sample (912); Mainly scooter/moped riders (116); Mainly off-road leisure bikes (182); Mainly on-road leisure bikes (402); Mainly commuter/daily use bikes (197)
A2B. And which of the following best describes the type [of bike] you ride most often?; A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being an expert

Implication for TfNSW: *The relationship between self-perceived skill and experience shows a level of overconfidence amongst riders with the lowest experience (0-2 years with a licence). Overconfidence is a factor in these early stages in particular, and there is an opportunity to utilise the many touchpoints at this early stage of riding (e.g., riding tests) to expose riders to knowledge and/or riding situations that can show them a greater range of danger.*

The narrower conception of scooter riding skills vs. motorbike riding skill is also an area to watch out for, where those who predominantly ride scooters may underestimate the kinds of situations they may find themselves in on the road.

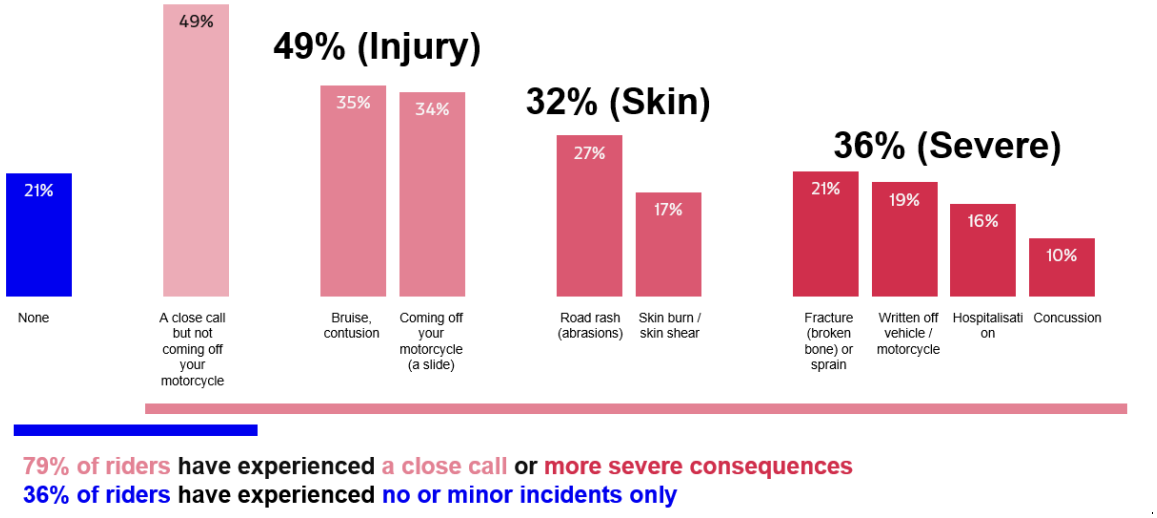
With high levels of self-perceived skill across the board, changing attitudes to risk is not about convincing riders to underrate their riding.

Crashes are transformative and influence future behaviour… for a time. This indicates that lived experiences of crashes does not necessarily lead to lower risk appetite

Close calls and crashes (articulated to survey respondents as "close calls/near misses" and "accidents" respectively) were common experiences amongst riders (79%, compared to 74% in 2012[4]) (**Figure 16**). Despite this prevalence, the outcome of these incidents was not always severe (36% have experienced a severe outcome).

[4] Ipsos Social Research Institute, *Motorcycle Attitudinal Quantitative Research Study,* August 2012, p30

Figure 16: % of Riders' that have experienced the following consequences of a motorcycle accident



Base: Rider Sample (912)
C6. And which of the following have you ever experienced personally when riding your motorcycle/moped/scooter?

Whilst riders were unified in the way they defined a "serious accident", often citing the most severe consequences – riders pictured themselves (and their motorcycle) flying through the air, hitting the ground at speed, resulting in death or serious injury – when it came to defining the scope of 'accidents' perceptions varied. For some riders, the prospect of a 'spill' (sliding off their motorcycles and/or crashing without severe injury) did not immediately register as an 'accident' because they are considered so common.

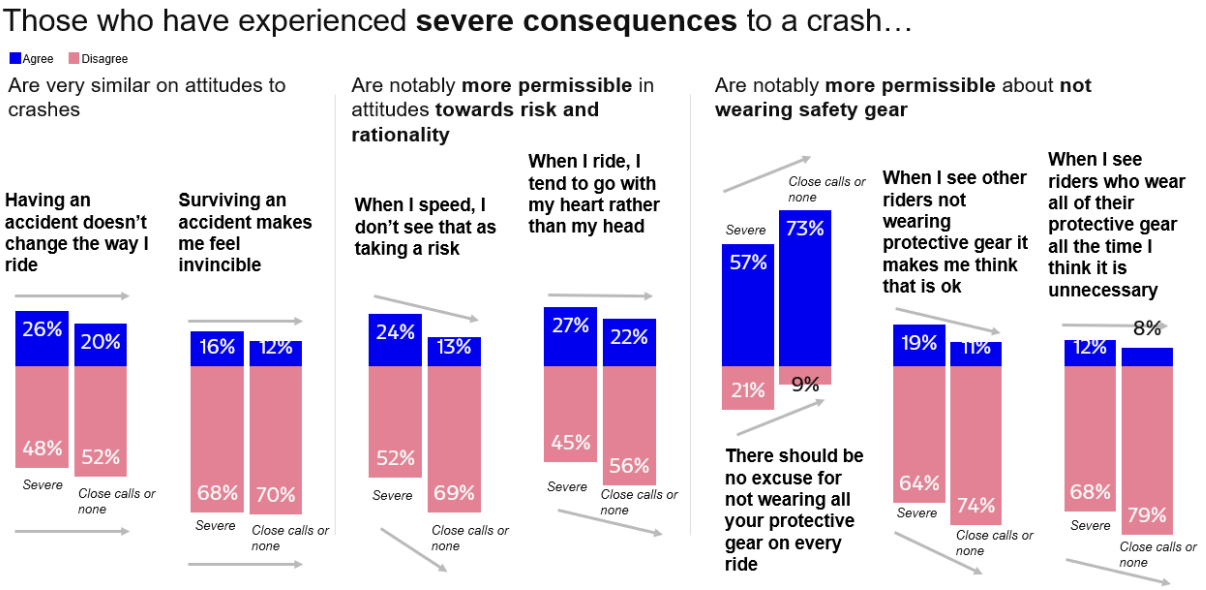
For passengers, the proportion who have experienced a close call or near miss is much lower than riders (35% versus 49%). Riders described altering their riding behaviour when travelling with a passenger on board, in particular, taking less risks with speed, overtaking, and weaving indicating that the presence of a passenger reduces risk taking behaviour and the risk of experiencing a crash or near miss.

The experience of a crash was found to have an initial impact on rider's behaviours, however there is strong evidence to indicate that this effect is not necessarily sustained. Once the initial shock of the crash had worn off, riders spoke of a waning effect, slowly going back to old habits.

> *"I ended up in hospital and to be honest wasn't sure if I was going to be able to ride again… it shook me and I can say for certain I rode much more carefully after that. Though I have to admit over the years old habits die hard… I'm still more careful than before but definitely not as much as I was in that first few months back in the bike."* ***Hobbyists and Enthusiasts***

The diminishing 'shock factor' is further demonstrated quantitatively - far from *increasing* vigilance, the experience of having a severe outcome from a crash is associated with *more* permissibility towards risk and safety gear. While it's important to note that, consistent with the majority of riders, riders who have experienced severe crashes are still strongly in favour of wearing protective gear, there is a significant increase in permissibility amongst severe crashers compared to those who have either never experienced a crash/close call of any kind, or only a close call (**Figure 17**). The same difference does not exist amongst the statements around crashes – "having an accident doesn't change the way I ride", and "surviving an accident makes me feel invincible."

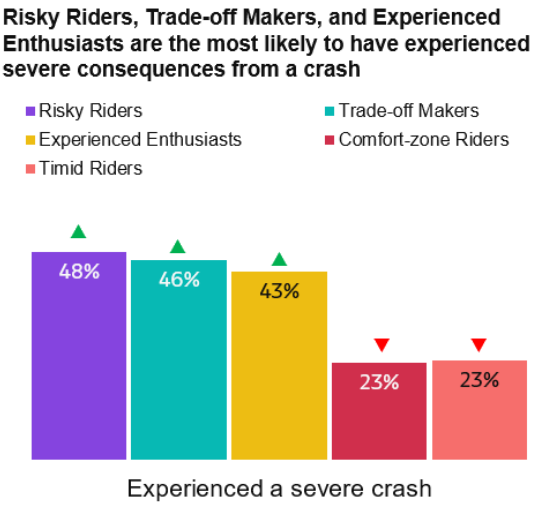
Figure 17: Riders with severe consequences from a crash vs. Riders who have experienced no/close calls only by attitude statements



Base: Rider Sample (912); Riders who have experienced severe consequences from a crash (340); Riders who have never experienced a crash or only a close call but not coming off the motorcycle (316)
B1. To what extent do you agree or disagree with the following statements?

The question then, is about causality – given this association, is it that having a severe crash makes riders more permissible as a result of the crash, or that their strong levels of permissibility made them more likely to experience a severe crash? The heightened benchmark of what is considered a 'serious crash' may explain why experiences, including those that lead to severe harm but are short of death, does not seem to have a strong effect on risk attitudes in the long term. The more experience riders have with more severe crashes, the less the spectre of a severe incident plays on their mind in day-to-day riding.

Figure 18: % Experienced a severe crash



Base: Rider Sample (912)
C6. And which of the following have you ever experienced personally when riding your motorcycle / moped / scooter?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

When broken down by segment, Risky Riders, Trade-off Makers, and Experienced Enthusiasts are the most likely riders to have experienced severe consequences from a crash (**Figure 18**).

It is clear in **Figure 19** that Risky Riders' approach to risk is particularly resistant to the effects of a crash, taking on a defiant tone. Displaying supreme confidence (and also the least experienced of our rider groups), overconfidence is likely a big factor in these attitudes.

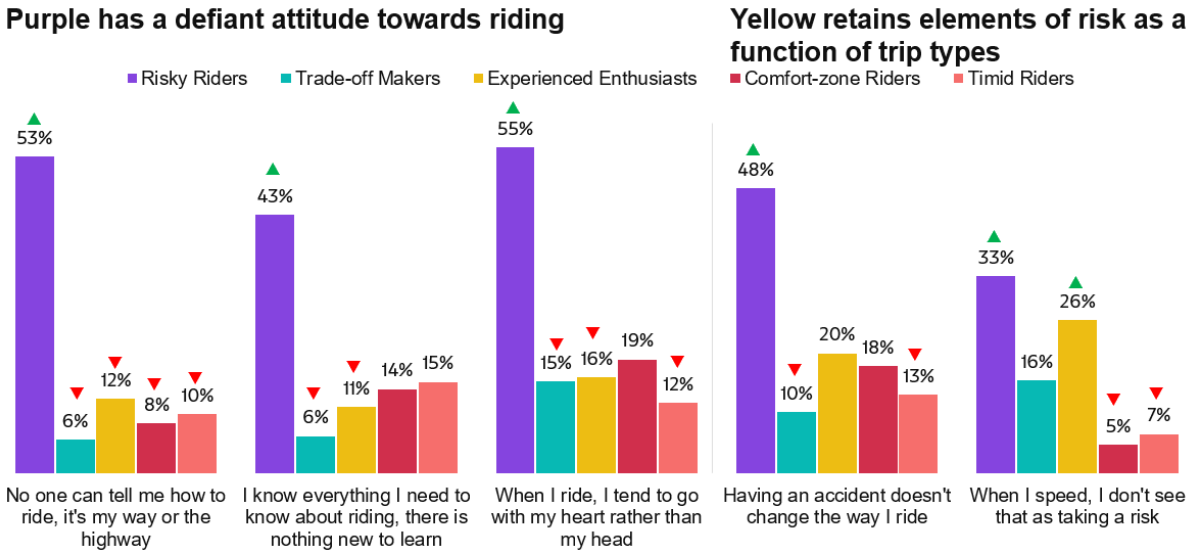
In contrast, for Trade-off Makers, it appears crashes are most impactful, and there is a marked difference in attitudes – the least likely of all segments to believe "no one can tell me how to ride" and "I know everything I need to know about riding." There may also be an element of changing attitudes as riders age, with some respondents in the qualitative research reflecting on their

growing maturity across life stages leading to less risky behaviour.

> *"I've had a couple of offs when I was younger. I've got a seven-year-old now and I'm older and I just grew up, basically."* ***Metro Commuters***

For Experienced Enthusiasts, resistance to the effects of a crash are a function of the types of trips they typically like to do. Primarily riding enthusiasts who love to do longer trips on the motorcycle, they aren't willing to give up that type of ride, even having experienced some crashes.

Figure 19: Attitude Statements by Segment



Base: Rider Sample (912); Risky Riders (125); Trade-off Makers (132); Experienced Enthusiasts (221); Comfort-zone Riders (190); Timid Riders (244)
B1. To what extent do you agree or disagree with the following statements?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Implication for TfNSW: *Examining the relationship between experience of crashes and risk attitude shows those who have experienced severe crashes have a higher risk tolerance and permissibility towards risk and wearing protective gear. Crashes may not be a viable territory to influence shifts in attitudes towards risk and protective gear. While lived experience of crashes are typically quite powerful in the weeks and months following the incident, the effect is temporary. In some cases, like with Risky Riders, experience of a crash may have the unintended consequence of increasing risk appetite.*

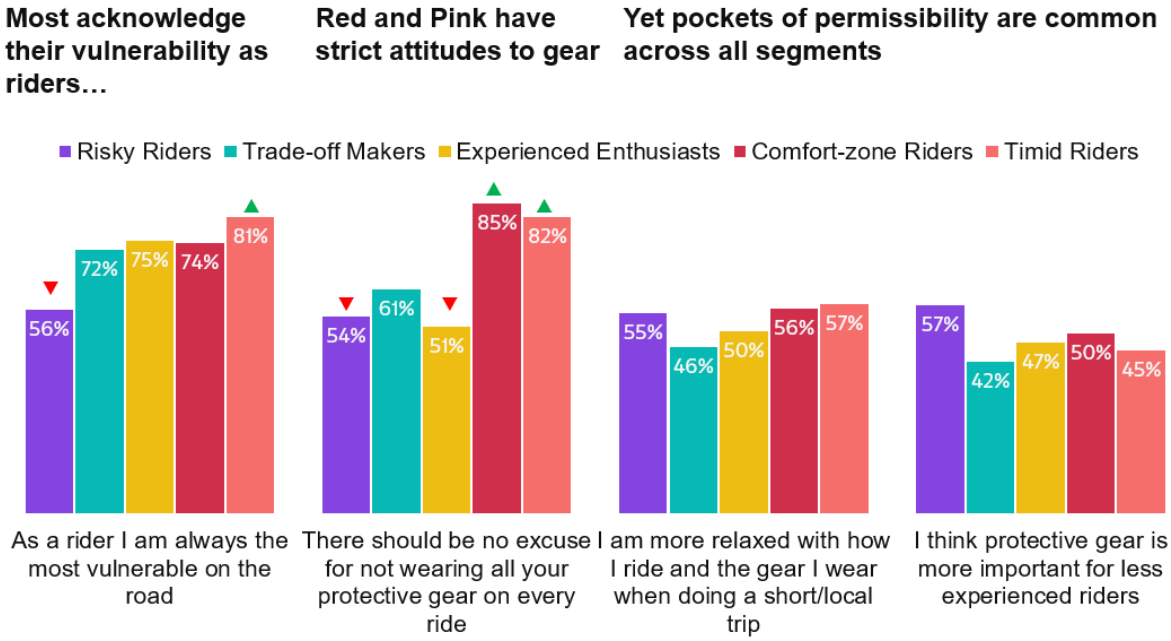
Protection and safety

Riders take protective gear seriously as it provides peace of mind in an inherently dangerous activity, however permissibility exists where this peace of mind can be supplemented by the type of trip or experience

While there were high levels of agreement around safety gear being important and critical to wear at all times (67% agree that "there should be no excuse for not wearing all your protective on every ride", 66% of those who agree also say "I am more relaxed with how I ride and the gear I wear when doing a short/local trip" and 69% of them say "I think protective gear is more important for less experienced riders") (**Figure 20**). There was a significant level of permissibility and areas for slippage for short or local trips, even when most riders agreed in principle that riders should wear all the gear all the time. This overlap in attitudes reflects the diversity of opinions on what is considered an adequate amount of protective gear, and when it should be worn.

Segment analysis found that while attitudes towards safety gear are strictest amongst our least risky segments Comfort-zone Riders and Timid Riders, the pockets of permissibility remain and are just as strong within these segments as the rest of the population. This highlighted a pervasive perspective among riders that there are 'valid exceptions' to wearing safety gear, even amongst segments who take a strict attitude towards protective gear in principle.

Figure 20: % Agree (NET Agree and Strongly Agree) with Attitude Statements by Segments



Base: Rider Sample (912); Risky Riders (125); Trade-off Makers (132); Experienced Enthusiasts (221); Comfort-zone Riders (190); Timid Riders (244)
B1. To what extent do you agree or disagree with the following statements?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Riders saw the purpose of safety gear as supporting riders in two major ways: (1) functionally and (2) emotionally.

From a functional perspective, riders saw the obvious benefit of gear was that it offered physical protection – it is a physical barrier between the rider and the road or other objects in the event of a crash. A vast majority (82%) acknowledged that "wearing protective gear will reduce the chances I'm injured if I crash." However, the extent to which protective gear offers physical protection was debated – for some riders, there was a belief that protective gear was mostly useful for protecting against injuries involving slides (abrasions and in more severe cases, skin shear) and not very useful for collisions (except for helmets). This was born out quantitatively with 1 in 3 riders (34%) agreeing "protective gear is only helpful for slides/slips, not serious accidents". Beyond protection from crashes and collisions, riders also cited visibility as a key feature (making them safer by making them more noticeable to car drivers on the road), and protection from the elements and general riding comfort (keeping them warm and dry) as reasons to wear motorcycle gear, however these were not as prominent top of mind.

The belief that protective gear is generally ineffective against the most severe crashes was by far the strongest in Risky Riders, with 54% agreeing "protective gear is only helpful for slides/slips, not serious accidents" and only 64% agreeing that "wearing protective gear will reduce the changes I'm injured if I crash". Disregarding and/or disbelieving the efficacy of protective gear in preventing or mitigating injury is a key attitude that propels riskiness amongst this segment.

From an emotional perspective, wearing protective gear was seen as a useful signal to other road users, both other riders and car drivers, that the rider is a 'serious' rider that can be relied upon to make sensible decisions while riding, and thus behave in a rational and predictable manner. This was contrasted against 'squids' and sometimes scooter riders who did not wear much gear (usually a helmet only) whose apparent cavalier attitude to wearing the right gear was seen as a reflection of their riding.

> *"For me, as annoying as it is, all the gear and having the right boots and stuff like that… and when I see girls on scooters with dresses and sandals, oh my God."* ***Metro Commuter***

Attitudes towards the functional and emotional roles that protective gear plays ladder up to a 'peace of mind' as an overarching motivation to wear protective gear. This is congruent with the permissibility of *not* wearing gear going up in situations where peace of mind is less of an issue – say, on a short trip, or with riders who are very confident about their abilities. Riders described the decision to wear or not wear protective gear as a risk-benefit calculation on every ride – assessing before they ride, if the risk is low – it's just a trip around the corner, the weather is great, the roads are empty at this time of the day – then wearing less gear is permissible. Convenience and comfort also play a significant role in the calculation – a jacket was said to be easy to throw on and comfortable to wear over clothes, so wearing it was not necessarily a big deal for peace of mind. By contrast, riders lamented about the inconveniences associated with wearing motorcycle pants; they take time to put on, it might necessitate a change at their destination, and some are uncomfortable to wear, fuelling the temptation not to wear motorcycle pants on occasions.

> *"It's 12 minutes to get ready to go for a three-minute ride. So that's like the hard justification, you sort of question, oh yeah, I'm just going down the road…"* ***Novice Rider***

> *"And there's hardly anyone that every time they get on a coat would wear full leathers and a helmet and a back brace and boots and gloves every time they got on. When I was commuting I'd wear a helmet and jacket and Kevlar jeans and boots and gloves every day because I was commuting. These days if I want to go up the street and it's summer, I'll never wear shorts, but I'll wear a t-shirt and I'll wear gloves. Other people don't wear gloves, other people wear mini skirts. Everyone's got their limit. I don't want to judge people because I'm certainly not the best and I'm certainly not the worst."* ***Metro Commuters***

A strong driver of wearing protective gear as a behaviour for some riders was the role it played in mentally preparing the rider for the journey ahead, "getting in the zone" to ride. This was particularly prevalent for those who engaged in long rides. We observed an element of ritual amongst these riders in putting on their gear.

The idea of ritual seems to resonate particularly strongly with Experienced Enthusiasts – this segment was by far the most likely to engage in long trips. Enthusiasts who ride primarily for the love of riding, with strong social connections amongst riders (44% ride as part of a social rider's group) – there is an opportunity to encourage the integration of protective gear as part of the *culture* of riding.

> *"It's a whole process, I go into the garage and start my bike, it takes 10 minutes to warm up before I can even get going, during which time I suit up… it sort of sets me up for the ride putting everything on and going through my 'routine'."* ***Hobbyists and Enthusiasts***

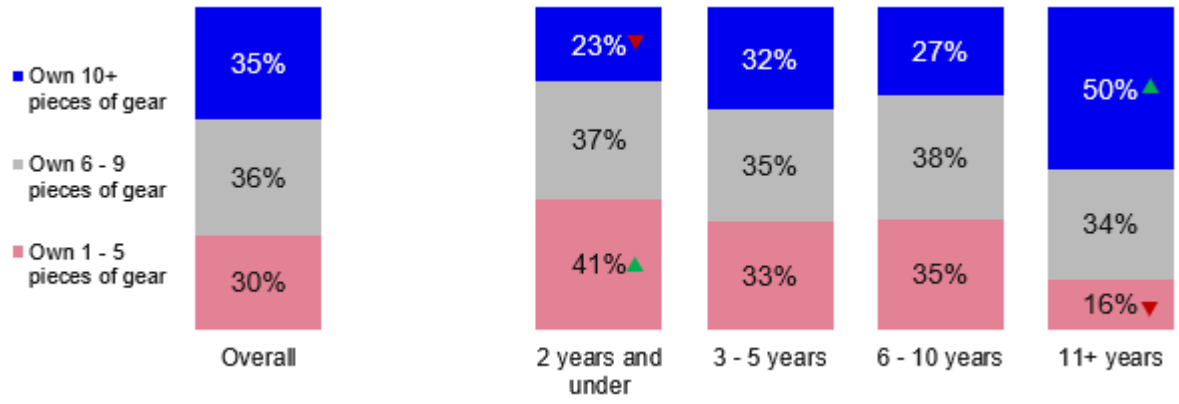
Implication for TfNSW: *While there is widespread acceptance amongst riders that wearing safety gear is important, there is an opportunity to reinforce the emotional elements of safety*

gear to dial up its importance in giving riders 'peace of mind' when riding. With widespread acceptance amongst riders that safety gear is important already, this is not so much about getting riders 'over the line' to wearing gear (they already accept that they should), but to keep these riders over the line, focusing on areas of slippage, such as on short trips, or riding on familiar roads.
One way to reinforce this is to work to make protective gear part of the culture of riding, promoting an image of putting on the gear as part of the process of riding, appealing to riders' sense of identity.

Riders own a lot of gear; gear gets accumulated over time

Riders own a wide variety of motorcycle gear – holding, on average, 8.3 items (which is similar to levels seen in 2012 where 47% of riders owned 4-6 items of protective gear[5]). The number of safety items owned increases with age (**Figure 21**), with half (50%) of those who have held their license for 11+ years owning more than 10 items of gear (significantly more than those who have held their license for under 2 years, at 16%). By contrast, just over 2 in 5 (41%) of those that have held their license for under 2 years own between 1 and 5 pieces of gear (significantly more than those who have held their license for 11+ years, at 16%).

Figure 21: Number of items of safety gear owned by years of license



Base: Rider Sample (912), Those that have owned a license for 2 years and under (446), those that have owned a license for 3-5 years (433), those that have owned a license for 5-10 years (433) and those that have owned a license for 11+ years (433)
S5. How long have you held a motorcycle license? D1. Which of the following protective gear do you currently own?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Riders detailed their process of accumulating gear overtime; they recounted starting with the bare minimum and built up the amount of gear they owned as they gained experience and skills and became "more involved" with the activity, whilst being unlikely to dispose of gear due to perceptions of durability and original expense.

> *"At the start I had I think just a helmet, but then when I really got into riding I went and splashed out on pants, jacket, and gloves. It's too expensive to buy it all if you're not sure if you'll stick with it."* ***Metro Commuter***

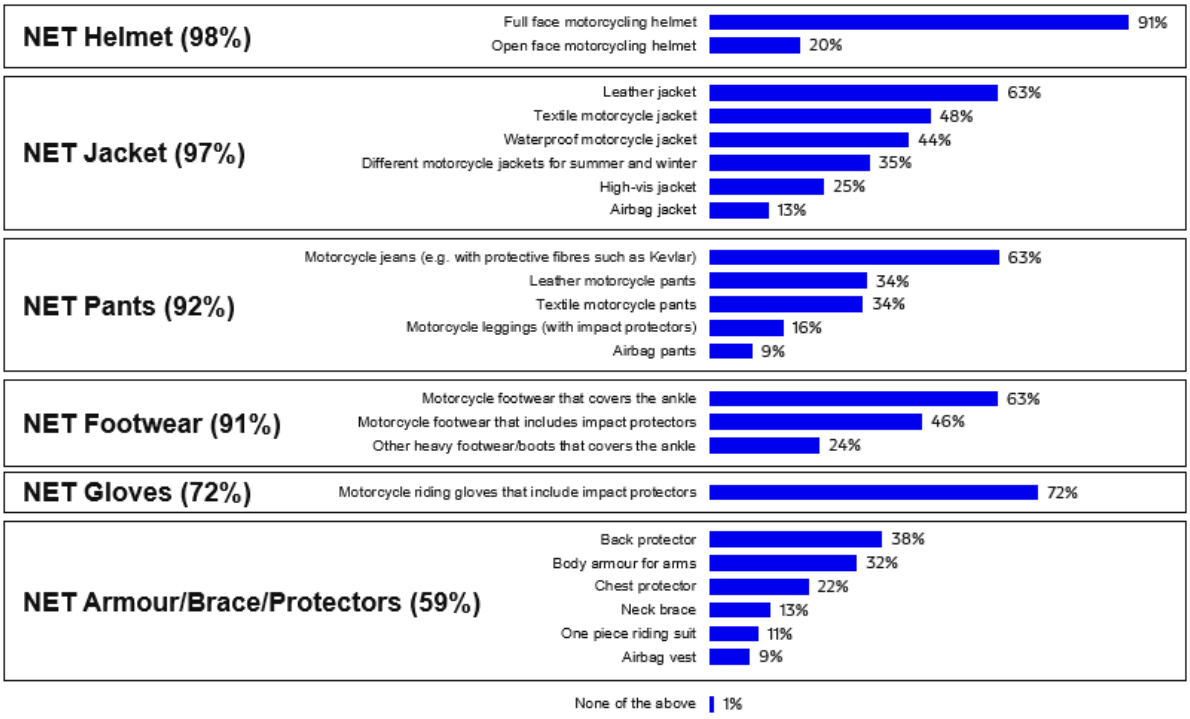
Among riders, there was a diverse distribution of ownership across the various types of gear (**Figure 22**). The research found that high ownership for helmets, jackets, and pants; almost all riders own a helmet (98%) and jacket (97%) and just over 9 in 10 own motorcycle pants (92%).

[5] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

This was similar to 2012, with jackets and full face motorcycle helmets in the top 3 items owned. [6]Whilst footwear appears to rival in terms of ownership (at 91%), ownership of footwear that is specific to motorcycling (motorcycle footwear that covers the ankle and motorcycle footwear that includes impact protectors) lags slightly behind at 4 in 5 riders (80%). Following this, ownership tapers off - just under 3 in 4 own motorcycle riding gloves (72%) and around 3 in 5 (59%) own another type of motorcycle gear (such as armour).

For passengers, like riders, there were high levels of ownership for helmets (96%) and jackets (92%), but much lower levels of pants (70%), footwear (77%), gloves (45%), and armour (25%). There is a perception that wearing gear (beyond a helmet and jacket) is mainly for the rider, and with passengers being less engaged in the activity, there seems a level of permissibility to not purchasing additional gear for similar reasons to riders. Passengers' top three barriers to owning more gear was cost (38%), rarely riding (35%), and only riding short trips (30%).

Figure 22: Protective Gear Owned



Base: Rider Sample (912)
D1. Which of the following protective gear do you currently own?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Those that have held their license for over 10 years are significantly more likely to own a jacket, footwear, and motorcycle gloves, when compared to those that have held their license for 10 years or less. This supports the finding that those riders not only accumulate more gear as they remain motorcycling, but also accumulate a great variety of gear.

[6] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

Riders' tendency to replace their gear on a regular basis is likely contributing to this finding; at least 4 in 5 of those that own a helmet (92%), riding gloves (85%), riding footwear (84%), riding pants (82%) and/or a riding jacket (81%) expect to replace the item within 10 years (**Figure 23**).

Figure 23: Expect to replace gear within 10 years

Base: Rider Sample (912)
D4. When do you/do you expect to upgrade your...?

Additionally, qualitative consultations indicated that as riders gained experience and enhanced their skills, their need and desire for upgraded and potentially more sophisticated gear, as well as the option to have gear that is in fashion, increased.

> *"Riding is my thing, I now have three bikes. I have my go to jacket, pants, but it's fun picking up new pieces to be a bit different, that match the different bikes... I wouldn't say I'm fussed about clothes in general, but your jacket and helmet absolutely have to match your bike!"* ***Hobbyists and Enthusiasts***

Across segments, Risky Riders own less protective gear than other riders. This is particularly the case for ownership of motorcycle gloves, whereby ownership is at a mere 30% (less than half of any other segment). Promisingly, **Figure 24** illustrates that gear ownership for other segments Comfort-zone Riders, Trade-off Makers, Experienced Enthusiasts and Timid Riders is high.

Figure 24: Protective Gear Owned by Segment

	All Riders	Risky Riders	Trade-off Makers	Experienced Enthusiasts	Comfort-zone Riders	Timid Riders
Helmet	98%	93% ▼	99%	99%	100%	100%
Jacket	97%	91% ▼	97%	99%	99%	99%
Pants	92%	86% ▼	89%	96%	97% ▲	90%
Footwear	90%	77% ▼	89%	93%	97% ▲	95% ▲
Motorcycle gloves with impact protectors	72%	30% ▼	85% ▲	87% ▲	77%	80% ▲
Armour/brace/ protectors	59%	68%	51%	66% ▲	55%	51% ▼

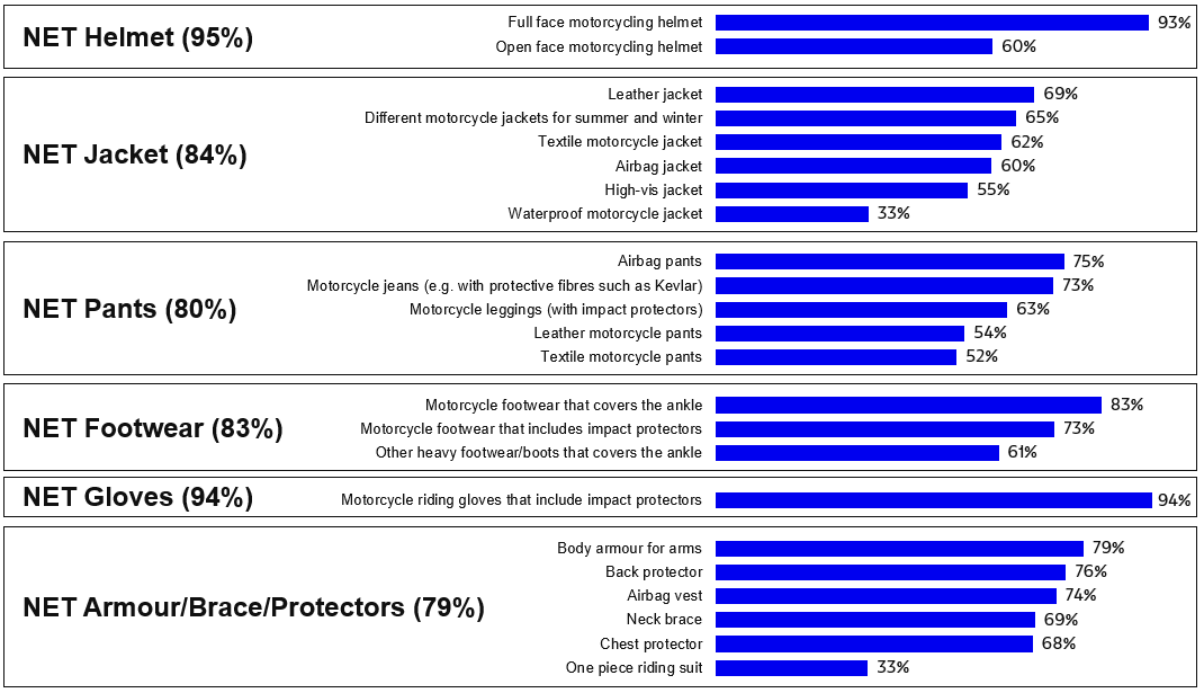
Base: Rider Sample (912), Risky Riders (125), Trade-off Makers (132), Experienced Enthusiasts (221), Comfort-zone Riders (190), Timid Riders (244)
D1. Which of the following protective gear do you currently own?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Although riders may possess safety gear, ownership does not guarantee its consistent use

Figure 25 provides an overview of the extent to which gear is worn all or most of the time. It is clear that riders tend to wear their helmet and motorcycle gloves on the majority of their rides

(at 95% and 94% respectively). However, there is a drop off for the other gear categories, with around 4 in 5 riders wearing their jacket (84%), motorcycle footwear (83%) and pants (80%) all or most of the time. While this is a majority of riders, there is room for improvement to ensure that almost all riders are wearing their gear at least most of the time.

Figure 25: Protective Gear Worn



Base: Rider Sample (912)
D2. And how often do you wear the following items of protective motorcycle clothing?

Risky Riders is the most relaxed segment in the behaviours towards wearing protective gear – not only does this segment of motorcyclists own less protective gear, those who own it are less likely to wear it consistently compared to other segments. This is particularly the case for jackets, footwear and gloves. Of additional note, Risky Riders have significantly lower rates of wearing their full face motorcycle helmet all the time when compared to all riders (39%, compared to 78% overall). The risk-benefit trade off that influences whether riders engage in risky behaviour is born out among Trade-off Makers who own motorcycle pants – they are less likely than other segments to wear them all or most of the time as a reflection of their calculated approach to risk taking; that is, rider in this segment claim to accept the risk associated with riding without pants to forgo the effort required to wear them on every ride. Conversely, the Comfort-zone Riders and Timid Riders are diligent in their approach to wearing gear (**Figure 26**).

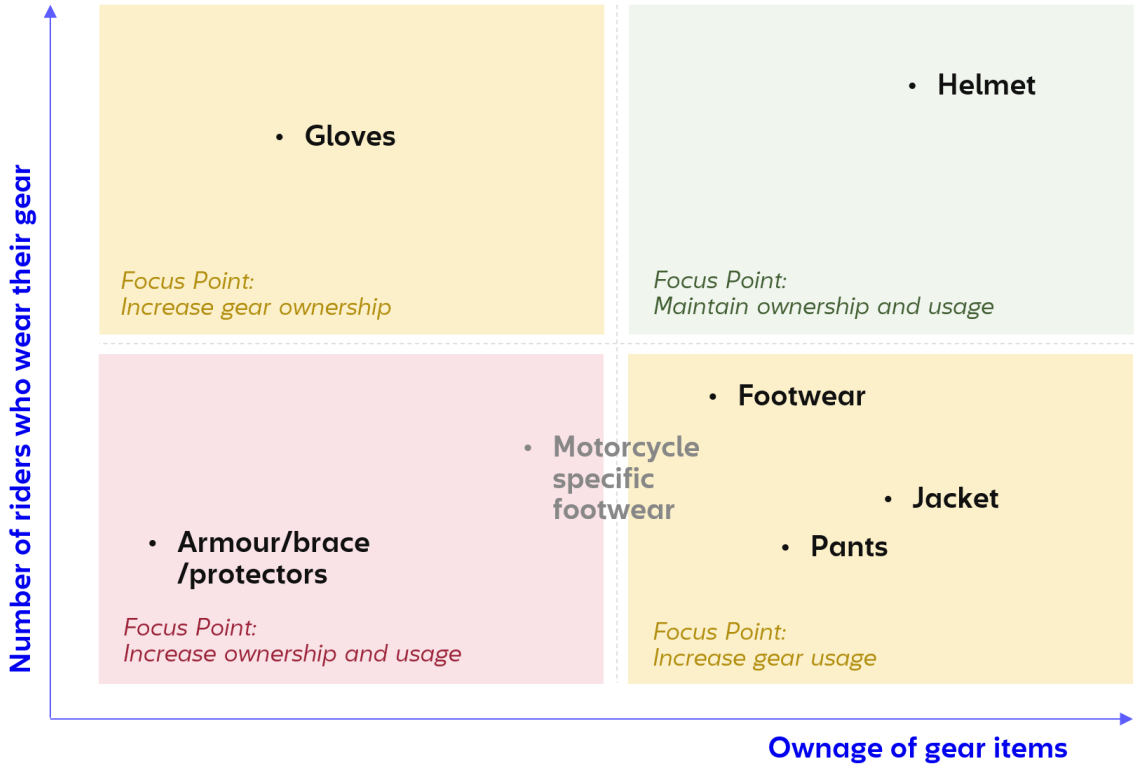
Figure 26: Protective Gear Worn by Segment

	All Riders	Risky Riders	Trade-off Makers	Experienced Enthusiasts	Comfort-zone Riders	Timid Riders
Helmet	98%	82% ▼	99% ▲	97%	96%	98%
Jacket	97%	71% ▼	83%	82%	92% ▲	90% ▲
Pants	92%	77%	67% ▼	76%	87%	88% ▲
Footwear	90%	69% ▼	82%	83%	90% ▲	87%
Motorcycle gloves with impact protectors	72%	81% ▼	97%	96%	97%	93%
Armour/brace/ protectors	59%	72%	75%	76%	91% ▲	80%

Base: Rider Sample (912), Risky Riders (125), Trade-off Makers (132), Experienced Enthusiasts (221), Comfort-zone Riders (190), Timid Riders (244)
D1. Which of the following protective gear do you currently own? D2. And how often do you wear the following items of protective motorcycle clothing? ▲▼Indicates a significant difference at a 95% confidence level from overall sample

Encouraging the uptake and wearing of specific items of protective gear was found to require different strategies. Mapping items of protective gear by the level of ownership and how that intersects with the extent to which that item is worn by owners (**Figure 27**) revealed four groupings each with a different focus point. The top right quadrant consists of those items that possess both high ownership and high usage, such as helmets. The top left quadrant consists of items that perform well on usage but are weaker in terms of ownership, namely gloves. Conversely, the bottom right quadrant contains footwear, jackets and pants; all of which have solid ownership amongst riders but are not worn as frequently. Lastly, the bottom left quadrant contains items that index low on both ownership and usage, which in this case is armour/ brace/ protectors.

Figure 27: Matrix of protective gear ownership vs usage



Base: Rider Sample (912)
D2. And how often do you wear the following items of protective motorcycle clothing?
Interpreting the risk matrix: *The horizontal axis represents ownership of safety gear items. The vertical axis represents the number riders who wear the item of safety gear (among owners).*

Implication for TfNSW: *Analysis of rider protective gear ownership and usage levels identifies the challenges for each item:*

- *For helmets, both ownership and usage are high and as such, a focus should be on maintaining current levels.*
- *For gloves, there is an ownership challenge – there is relatively low ownership, however, a large portion of riders who own gloves will wear them all the time.*
- *For footwear, there is an opportunity to increase usage. Furthermore, ownership of motorcycle specific footwear does drop off slightly. Accordingly, there is an opportunity to boost both ownership and usage of motorcycle specific footwear.*
- *For jackets, whilst ownership is rivalling the level of helmets, the amount that these jackets are worn drops off significantly. Therefore, the challenge is to increase how often jackets are worn while riding.*
- *For pants, the challenge is around lower levels of usage when compared to ownership.*
- *For armour/brace/protectors, there is low ownership and usage. However, as discussed in the following section, this is a symptom of the specific use case of these items, and accordingly, does not present a significant challenge.*

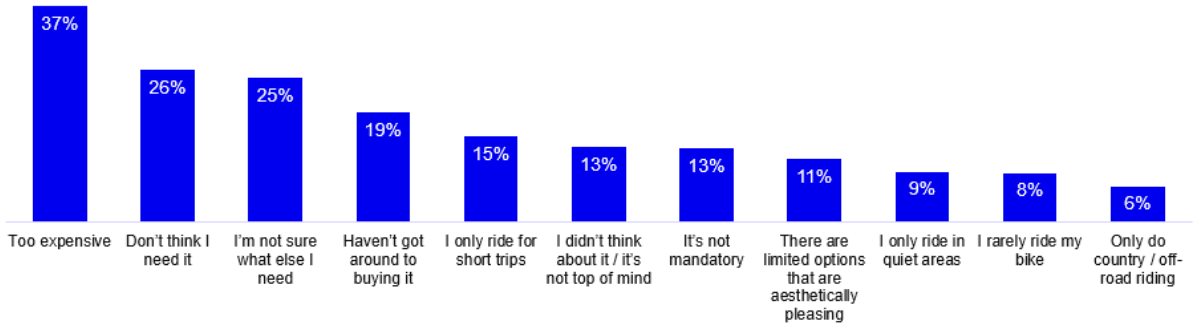
Analysis by segment has identified that:

- *The Risky Riders Segment is the key segment of concern in relation to both safety gear ownership and usage.*
- *The Trade-off Makers Segment under indexes on wearing pants, as such, there is an opportunity to boost usage amongst this segment.*

Addressing barriers to ownership will require overcoming both practical and emotive considerations

The leading barriers to ownership of more protective gear is it being too expensive (37%), the rider not thinking they need it (26%), being unsure what else they need (25%), not getting around to buying it (19%) and only riding for short trips (15%) (**Figure 28**). These reasons are consistent with those seen in 2012, where gear being too expensive (28%) and not thinking they need it (26%) being two of the top three reasons for not owning gear.[7] Those that believe gear is too expensive is higher among the 18-34 age bracket (at 42%), which is likely a reflection of the comparatively lower income of this cohort of riders. Furthermore, individuals in regional areas are significantly more likely to believe they don't require additional gear (33%), presenting a key reason for those that do not own sufficient gear in this group. This underscores a potential obstacle in addressing the mindset of regional riders who feel that their specific riding conditions may not warrant comprehensive protective gear.

Figure 28: Leading barriers to owning protective gear



Base: Rider Sample (912)
D3. What are the main reasons you don't own more protective motorcycle clothing?

The top 3 barriers to owning protective gear are consistent across segments emphasising the hurdle cost, a perception that it is not needed, and uncertainty around what else is required play in riders' justification for why they do not own more gear. However, there are some nuances per segment. Experienced Enthusiasts are significantly more likely to agree that a main reason for them not owning more protective gear is they don't think they need it (33%) and they are not sure what else they need (33%). However, this is contextualised by the fact that this segment own more items of gear on average (9.3 items) suggesting that resistance to owning additional protective gear may be genuinely warranted rather than a function of ignorance. Conversely, Risky Riders over index on a range of reasons, including: I didn't think about it (23%), I only ride in quiet places (20%), I rarely ride on my bike (18%), there are limited options that are aesthetically pleasing (17%), and I only do country or off-road riding (17%). Additionally, they were found to cite more and a greater variety of reasons to justify their reasons for not wearing gear that range from personal preference to perceived practical reasons (such as location of riding). This suggests that these riders deflect their need to own protective, which is reflective of their belief that they are exempt from the expectation to own and wear all the gear, all the time.

There are three types of safety gear that are owned by less than 9 in 10 riders: motorcycle gloves, footwear, and other riding gear. These are explored in turn:

Motorcycle Gloves

[7] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

The groups that were significantly less likely to own motorcycling gloves included moped and scooter riders (at 50%), riders aged 18-34 (at 62%), riders who live in capital cities (at 68%) and First Nations riders (at 53%). As such, riders who tend not to own protective gloves are predominantly those who operate scooters within densely populated, metropolitan regions. Qualitative consultations found this to be a reflection on the perceived convenience and short-distance nature of their rides. This was reflected in the quantitative data where riders who do not own gloves were significantly more likely to say the main reason they don't own more protective gear is because they 'only riding for short trips' and 'only riding in quiet areas' (at 21% and 15% respectively, compared to 15% and 9% for all riders).

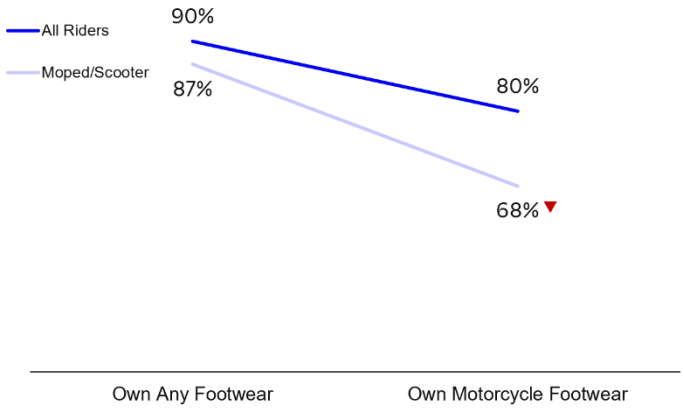
Additionally, some riders admitted that their perceptions of motorcycle gloves as essential came only after riding for a period of time. Riders first and foremost thought about helmets and jackets as offering protection in the event of a crash, however through experience, riders came to understand that should they come off their motorcycle their hand would often be the first point of contact with the road and gloves offered a level of necessary protection in this event.

> *"I remember thinking one day, if I come off my bike and my hand goes down… that's not going to be a pretty sight. It grosses me out thinking about it. I went out and bought gloves straight away."* ***Metro Commuter***

Footwear

Whilst just over 9 in 10 (91%) of riders wear footwear that protects their ankles when riding, this number tapers off to 4 in 5 (80%) when considering footwear that is specifically made specifically for motorcycling (**Figure 29**). Those aged 18-34 and moped and scooter riders were significantly less likely to own motorcycle specific footwear when compared to riders in general, at 68% and 68% respectively.

Figure 29: Protective gear owned by type of rider



Base: Rider Sample (912), Mainly scooter/moped riders (116)
D1. Which of the following protective gear do you currently own?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Additionally, it was apparent that those who typically ride mopeds/ scooters were significantly less likely than all riders to own footwear specific to motorcycling (**Figure 28**). Among those that do not own motorcycling footwear, 'only riding for short trips' and 'only riding in quiet areas' were significantly higher reasons for not owning more protective motorcycle clothing when compared to riders at large (at 23% and 16% respectively). These barriers mirror those for gloves. As such, this presents an opportunity to emphasise the need of all safety gear (including gloves and footwear) when undertaking a ride of any length and in any setting.

Other riding gear

Other protective riding gear was typically associated with specific occasions and purposes including motor-cross riding or off-road. This was supported quantitatively by the fact that those who ride off-road leisure motorcycles most often (including off-road/trial bikes, dual sports, adventure and motocross) were significantly more likely to own other riding gear (when compared to all riders). Additionally, CALD audiences were significantly more likely to own

other riding gear, when compared to the non-CALD audience (68%, compared to 56%). As such, riders shared the sentiment that unless you engaged with a particular type of activity that required specialised protective gear there was no need to own it or wear it on other types of rides (for example, general commuting).

> *"There are some items you'd only get if you were doing something like say motocross. I wear more gear for that but never put it on when I'm just on my scooter."* ***Commercial Rider***

Implication for TfNSW: *In order to see an uptake of riders wearing gloves, motorcycle footwear, and other protective gear such as armour, the challenge of increasing ownership needs to first be addressed.*

The leading barriers to wearing gear involve concerns about its comfort and practicality for everyday use

At an overall level, the leading barriers to wearing gear were it being too hot to wear (27%), it being only necessary for some rides (24%), having nowhere to store it at their destination (22%), it being uncomfortable or restrictive to wear (21%), and not wanting to change clothing at their destination (20%) (**Figure 30**). The length and type of ride was similarly a barrier in 2012, whereby three in ten motorcyclists who did not wear certain items of protective clothing all the time said it was because they did not wear as much for short trips (29%).[8]

Figure 30: Barriers to wearing protective gear

Base: Rider Sample (912)
D3A. What are the main reasons you don't wear all your protective motorcycle clothing on every ride?

Although riders acknowledged that riding gear has come a long way in terms of wearability, comfort, and style the data suggests that this is still a challenge to overcome to see an increase in the usage of gear (particularly around heat of the gear, comfortability and the need to change gear when arriving at their destination). Additionally, the perception that protective gear is only necessary on some rides reflects riders' tendency to minimise the risk associated with short or local trips in familiar areas.

Risky Riders and Trade-off Makers riders were identified as those where the greatest efforts to encourage wearing protective are required. Among Risky Riders, their barriers to wearing safety gear are a symptom of two key characteristics: their laissez-faire attitude towards safety and their limited association with the identity of being a motorcycle rider. Whilst their top reason for not wearing their gear all the time is in line with other riders (27% 'it is only necessary for some rides'), they were significantly more likely to state that a reason for not wearing their gear was that they forget or its not top of mind and that they do not want to be

[8] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

seen in all their gear at their destination (23% and 21%) respectively, when compared to all riders (10% and 10% respectively). Among riders who typified this segment it was observed that they commonly self-excluded from messages that spoke to the importance of wearing all protective gear on every ride believing it to be unnecessary and over the top. Shifting the behaviour of this segment may require bypassing their decision-making process through the intervention of mandates. Green's (the second riskiest segment) most prominent reason for not wearing all of their protective gear was that they do not want to change clothes at their destination (at 30%, significantly higher than overall riders, which was at 20%) demonstrating that these riders are adversely impacted by the perceived hassle wearing safety gear. Considerations relating to how protective gear is designed and storage options may be of increased relevance to this segment. The main barriers for the Comfort-zone Riders, Experienced Enthusiasts and Timid Riders are consistent with what was discussed for the overall sample.

Focusing on the three categories of protective gear that are underperforming in terms of the extent they are worn provides insight into the factors that undermine usage of each item:

Pants

Among riders that own pants but only wear them sometimes, rarely or never, there are two main reasons for not wearing their protective gear all of the time: a perception that it is only necessary for some rides and secondly, the practicality of wearing the gear. This included having nowhere to store them at their destination, pants being uncomfortable or restrictive and an inability to wear it over clothes they need to wear at their destination (**Figure 31**). These barries to consistent usage hint at the potential benefits of developing strategies for riders to overcome these challenges and exploring more adaptable and convenient gear solutions and to encourage regular wear.

Figure 31: Barriers to wearing protective gear

Base: Rider Sample (912), Own pants but don't wear them all/most of the time (169)
D3A. What are the main reasons you don't wear all your protective motorcycle clothing on every ride?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Jackets

Among riders that own jackets but only wear them sometimes, rarely or never, practical obstacles to usage were prominent including having nowhere to store it at their destination (main reason for 27% (=2nd)) and getting too hot when wearing it (main reason for 27% (=2nd)). The leading barrier was the belief that jackets are only necessary for some rides (main reason for 28%), It is apparent that educating riders of the need to wear their jacket on every ride, providing ways to stay comfortable in their jacket and storage at end of ride may help to boost usage of jackets.

Footwear

Figure 32: Barriers to wearing protective gear

Among riders that own footwear but only wear the something, rarely or never, barriers to wearing gear often relate to comfort concerns and practical considerations at their intended destination. The primary reason reflects riders' perception that the footwear is uncomfortable (**Figure 32**). This is a challenge to overcome to promote the use of adequate footwear. Moreover, a notable challenge for riders appears to be the management of their footwear upon reaching their destination. Specifically, the necessity to change can cause inconvenience, and riders are reluctant to be perceived in their full gear. This means that the promotion of footwear that is suitable for everyday activities or the development strategies manage footwear once arrived at a destination may help to promote footwear usage.

Implication for TfNSW: *Efforts to increase usage of pants, jackets and footwear should consider to the whole rider journey – not just the ride, but the destination too. This would reflect where riders' see the greatest pain points – storage, changing, and being seen in their gear when off their motorcycle. This may require engagement of retailers who play a central role in the type, style, and make of protective gear that is made available in Australia to ensure there are options that meet the requirements of riders. Additionally, the promotion of on-bike storage may be considered to address riders' concerns about what to do with their gear at their destination.*

A certain standard of quality and safety are assumed for all protective gear that is sold in Australia

Riders make assumptions about the safety and quality of protective gear. It widely acknowledged that for an item to be sold in Australia it must meet the AS/NZS legal requirements for design, performance and testing. It is assumed that these legal requirements are comprehensive and exceptionally strict, and are not just a minimum level of protection (i.e., a pass or fail system). This is confirmed by the fact that 4 in 5 (82%) agreed that helmets sold in Australia meet a suitable standard and nearly 3 in 4 (73%) agreed that protective gear sold in Australia meets a suitable standard (**Figure 33**). Therefore, for riders the safety of their protective gear has already been validated by a relevant authority which in turn means that safety standards are low in the decision hierarchy when reviewing or purchasing protective gear.

In reality, Australia only has "standards" for helmets and not protective gear. With high rates of belief in the notion that all gear meets a "standard", there is an opportunity to communicate that there is no such standard for protective gear, and that therefore knowledge of a rating system such as MotoCAP can be an easy way to assess the safety of potential gear purchases.

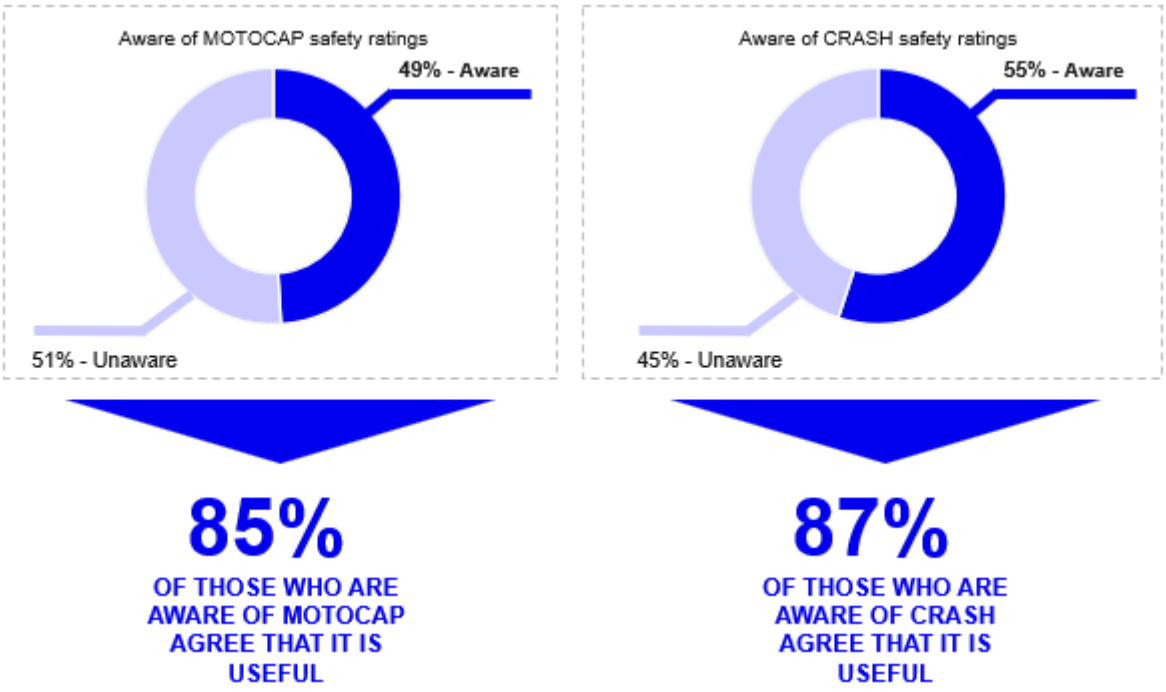
Figure 33: Attitudes towards protective clothing and safety features (% Agree/Strongly agree)

Base: Rider Sample (912)
D6. To what extent do you agree with the following statements about protective clothing and safety features? TOP 2 BOX AGREE/STRONGLY AGREE

> *"I take it for granted that Australia has good standards on things like protective gear and helmets. I wouldn't buy something online from America, for example. No."* ***Commercial Rider***

When personal confidence in assessing the safety of protective gear is reviewed, confidence levels were much lower - only half (52%) agreed that is easy to tell how safe protective gear is. These lower levels of personal confidence are likely a reflection of the fact that riders have effectively 'offloaded' this responsibility to an authority, and as such have not had to engage with the safety requirements of their protective gear at a more granular level. This is highlighted by the modest levels of awareness of both the Motorcycle Clothing Assessment Program (MotoCAP, 49%) and Consumer Rating and Assessment of Safety Helmets (CRASH, 55%) system (**Figure 34**). Encouragingly, however; those who are aware of the programs rated them highly in terms of their usefulness (85% for MotoCAP and 87% for CRASH), suggesting that riders are open to advice and guidance from relevant authorities when they choose to engage.

Figure 34: Awareness and usefulness of CRASH and MotoCAP



Base: Rider sample (n=912). QD8B - Prior to today, had you heard of the MotoCAP safety ratings for motorcycle gear? QD8C - How useful do you find these safety ratings
Base: Riders aware of CRASH / MotoCAP safety ratings (n=499). QD8D. How useful do you find these safety ratings?

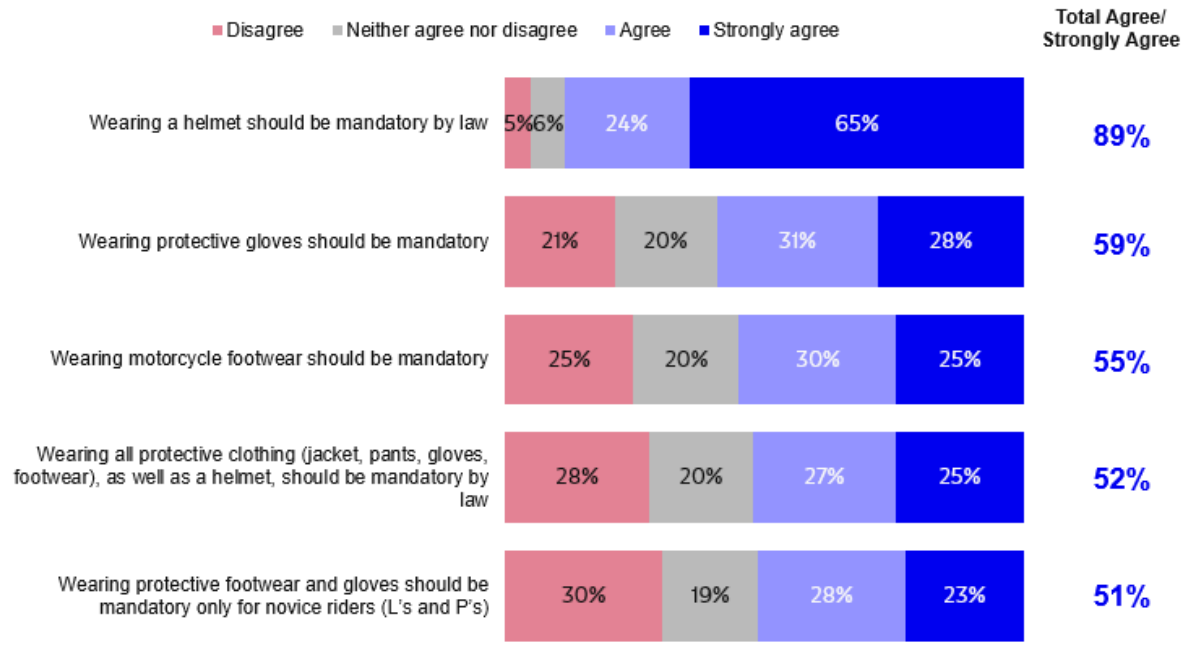
Mandating helmets stands as a prime example of the efficacy of enforcing protective gear requirements

Mandating the wearing of helmets by law in Australia is well-known and accepted by riders. Riders saw the helmet as an essential piece of protective equipment, with high levels of support for its mandate in law. There is a norm around its use, with even the riskiest riders compelled to wear a helmet. This is demonstrated through both high ownership (at 95%) and usage (at 95% of owners) of helmets among riders.

> *"You see learners on the bikes, and they're just wearing shorts and t-shirts or singlets. You know the muscle singlets and thongs. It's like okay if you get hit, you're gone. But they've got their helmet on because that's the only standard compliance thing that you have to wear."* ***Hobbyists and Enthusiasts***

This normative acceptance of helmets and its essential role in riding is accompanied by widespread agreement with its compulsory legal status.

Figure 35: Agreement with statements about protective clothing: % agreement with mandated gear



Base: Rider sample (n=912).
D10. To what extent do you agree with the following statements about protective clothing?

Implication for TfNSW: *There is an opportunity to re-educate riders on the differing roles of AS/NZS legal requirements compared to MotoCAP and CRASH, and how each should be used to inform decision making when purchasing protective gear.*

Beyond helmets, it was apparent that there is permissibility from riders to mandate the wearing of other types of gear. This is evidenced by over half the riders (52%) agreeing that wearing all protective clothing (jacket, pants, gloves and footwear, as well as a helmet) should be mandatory by law (**Figure 35**). There were similar levels of openness to the mandate of wearing protective gloves (at 59%) and wearing motorcycle footwear (at 55%). This suggests that there is scope to extend the mandates to use protective gear beyond helmets.

However, the fact that helmets are seen as distinct from other types of protective gear calls for additional considerations. Both qualitatively and quantitatively, riders overwhelmingly perceived helmets as non-negotiable and life-saving pieces of protective gear. This perception of helmets being essential was conceptualised by qualitative respondents as (1) to do with the importance of the head/skull/brain being protected compared to other parts of the body, and (2) with the perception that the helmet was a real physical barrier between the rider's head and the road, in contrast to the idea that other safety gear was primarily there to mitigate lesser injuries such as abrasions and minor collisions.

> *"When I fell off and hit the road I had just a thin hoodie on and shorts. I actually didn't... scraped a little bit of my legs but I hit my body and my head hit the road and it felt like a speed ball. And I was like, if I had no helmet, I'd be gone. I would've died probably. Because just the way it hit, it felt like nothing."* ***Metro Commuter***

This was found to manifest in rider behaviour through much more caution when it comes to helmets. While a tear in a motorcycle jacket was typically acceptable – many riders reported that they would still wear it without much thought to reduced efficacy – the same level of imperfection in a helmet was typically unacceptable. Riders displayed much more attention to replacing helmets after an impact, even an unintentional drop, and over time compared to other protective gear. This also came out strongly in the data, with a majority of riders (79%) replacing their helmet within 5 years.

> *"I felt less safe in my old helmet that I'd had for too long, because I'd ridden it for... And then I stopped riding for a few years, and then started riding again, and used the old helmet. And I was just like, 'Oh, this thing is a bit scratched and old, and I just don't feel comfortable in this'."* ***Commercial Rider***

Implication for TfNSW: *Helmets have provided evidence for the effectiveness of mandating safety gear and it is clear that there is a level of openness to mandating all types of safety gear. However, the challenge is that helmets are viewed differently from other forms of safety gear and are seen as crucial to life preservation when riding a motorcycle. Therefore, to replicate the success of mandating helmets for other types of gear, it will be essential to ensure that these types of gear are viewed as crucial to the safety of riders.*

There are cultural levers relating to gear which could be leveraged in communications

The research found that certain slogans were deeply embedded into motorcycle culture – in particular 'All The Gear All The Time (ATGATT)' and the more colloquial 'dress for the slide, not for the ride'. These phrases were commonplace among riders consulted, have been embraced by a number of rider groups / associations, and have been used by organisations such as the Transport Accident Commission (TAC) in their advertising campaigns. However, given the pervasiveness of such slogans, it is evident that this has not yet translated into mainstream behaviour and a culture of gearing up fully for *every* ride – particularly among riskier segments. The research identified other elements of rider language and culture that are noteworthy and could be leveraged as part of communications to encourage riders to wear more gear, more frequently.

- ***Ridicule of 'squids':*** While riders were typically fiercely protective of other riders, there was also evidence of in-jokes within the rider community which target very specific types of riders and broadly act as a form of social cohesion amongst other riders. 'Squids' are one prominent example, who are named as such because they usually have large amounts of skin exposed. Riders described them as wearing very little protective gear, for example they include riders who wear shorts, t-shirts and thongs. It was commented that the lack of gear was also usually accompanied by erratic driving behaviours such as very high speeds, wheelies in crowded traffic areas, and overtaking on blind corners. While only perceived to be in the minority, squids are commonly thought about as one of the reasons why riders have a bad reputation.

  > *"So there's a derogatory term or name for it and that's squidding. Yeah. Going out as a squid where you're not wearing protective equipment."* ***Regional Commuter***

- ***Group conformity:*** The research found that many riders are part of formal associations and/or ride as part of a group. Riders reported that during rides with others they felt a certain amount of social pressure to conform with the group, such as matching of attitudes and behaviours to group norms and practices. This included riding behaviours such as speed matching, lane filtering etc., but also the amount of protective gear that was worn and the style of gear that was worn. Positive examples of group conformity

included Harley riders who wear full black leathers, who ride at a slow pace and stick together as a group. However, there were also examples of how social conformity led to more risky rider behaviours where peer pressure may have led to the whole group deciding to wear very little gear or to engage in very high speeds etc.

"I don't know if it was a club or not, but I recently saw about 8 or 10 maybe big fat bikes, I think Harley cruisers and it was fine. I was actually admiring the way they conducted themselves on the motorway - they all moved like one unit. They all moved together and changed lanes together and did it slowly and purposefully and it gave me enough time to figure out what I wanted to do whether I wanted to overtake them or stay behind or go. I was impressed by that one particular account." ***Regional Driver***

- **Ritual of the longer ride:** Long rides were identified as an occasion when all the gear is always worn - even if it was just something riders did occasionally they were more likely to wear all of the gear on these types of rides. The overarching factor behind gearing up for these rides was the trade-off between the length of the ride and the time it takes to fully gear up. For longer rides, the time spent gearing up was proportionally small compared to the duration of the ride. Furthermore, gearing up was often considered as part of the ritual for a long ride, along with warming up their motorcycle and preparing their route and stopping points. Longer rides were also naturally associated with more time on the road, which meant that the opportunity to come off their motorcycle was higher, and the chance of experiencing varying weather conditions was more likely. Counter to this, shorter rides were associated with lower risks and a less positive ratio of time spent on the road versus time spent gearing up.

  "On the longer rides I wear the Kevlar jackets and jeans, and the boots. I find them very comfortable to ride in for long periods of time and also very comfortable when you get off the bike if you're stopping somewhere for a coffee or lunch or something like that." ***Regional Rider***

Implication for TfNSW: *Social proof, rituals, and humour are cultural levers that are available to be further explored for the development of future communication campaigns.*

Safety features are a secondary thought when riders are considering a motorcycle

The process of researching and selecting a motorcycle was exciting and enjoyable to riders. The research found that many considerations were being made to choose the right motorcycle with top of the hierarchy including riding purpose (for example off-road versus on-road), make, model or brand of the motorcycle, price, and the aesthetics of the motorcycle. Whilst riders commented on the usefulness of safety features, it was rarely a leading or influencing factor in their decision making. Underpinning the de-prioritisation of safety features in the purchase decision making was the assumption that the majority of motorcycles sold in Australia would have the essential safety features built in and stand up to an appropriate level of road safety and testing standards (similar to the assumptions made about protective gear). Additionally, riders were observed to being using brand name and its reputation as a proxy for assessing whether a motorcycle was 'safe'. Whether a brand was deemed reputable or not was mostly discerned from positive reviews and word of mouth recommendations from the riding community.

Riders debated whether certain safety features in fact restricted the development of riding skills and taught riders to depend on these features, rather than learning the necessary skills to wield more powerful and advanced motorcycles that they would likely upgrade to when on their full licence. One example was the anti-lock braking system – riders hypothesised that riders who

were taught and used to clutching at the hand brake would lack the skills to ride, or potentially prohibit the riding of other motorcycles where this was not a feature and the outcome would be the motorcycle slipping out from under the rider. This sentiment was shared by over 1 in 5 riders and was particularly strong among Risky Riders (52% agree) who as a segment tend to have more experience with different types of motorcycles and an aversion to feeling restricted when riding (**Figure 36**).

Figure 36: Agree/Strongly agree with the statement 'safety features on a bike prevent you from being a skilled rider'

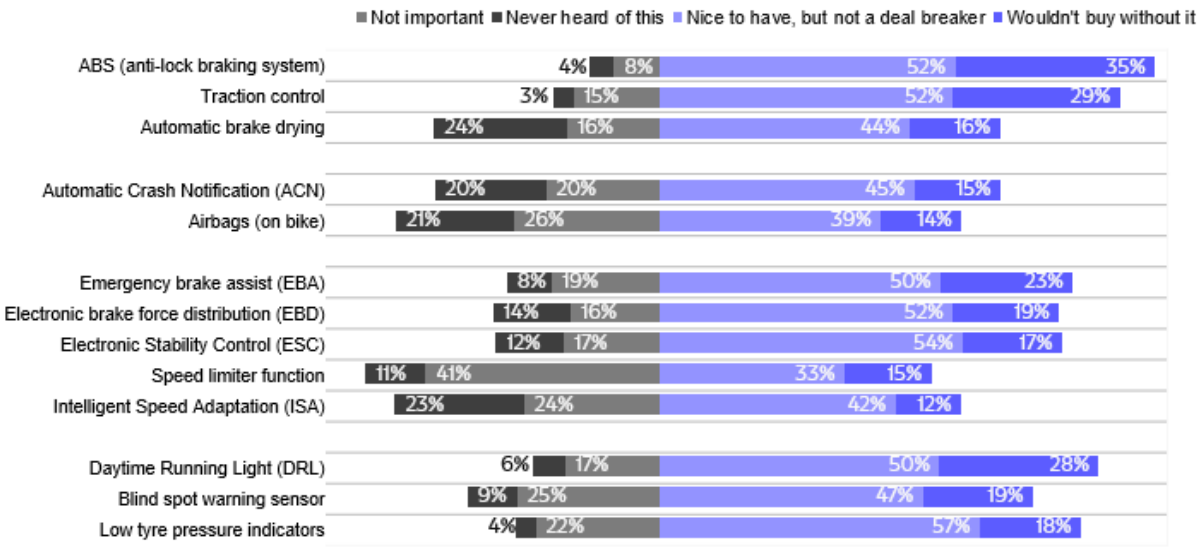
Base: Rider Sample (912), Risky Riders (125), Trade-off Makers (132), Experienced Enthusiasts (221), Comfort-zone Riders (190), Timid Riders (244)
D6. To what extent do you agree with the following statements about protective clothing and safety features?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

The importance that riders placed on different types of safety features further highlighted that for most riders these features are not a critical part of their purchase decision. Those who were more likely to consider safety features as 'must haves' skewed to the segments with lower risk appetite and salient attitudes towards safety: Comfort-zone Riders and Timid Riders.

Whilst the claimed importance of motorcycle safety features was relatively modest overall, across the different types of features some piqued greater interest. Features designed to minimise slides (ABS and traction control) were of most importance to riders and were widely known among the riding community (**Figure 37**). These features remain important for riders, with 54% and 35% of riders stating ABS and traction control respectively are very effective in improving motorcycle safety in 2012.[9] Features that 'functioned in the background' and supported safe riding without riders necessarily noticing it (such as EBA, EBD, ESC) were also welcomed and regarded by riders, however seen as a 'nice to have' rather than a deal breaker.

[9] Ipsos Social Research Institute, Motorcycle Attitudinal Quantitative Research Study, August 2012, p30

Figure 37: Importance of features when buying a motorcycle, moped or scooter

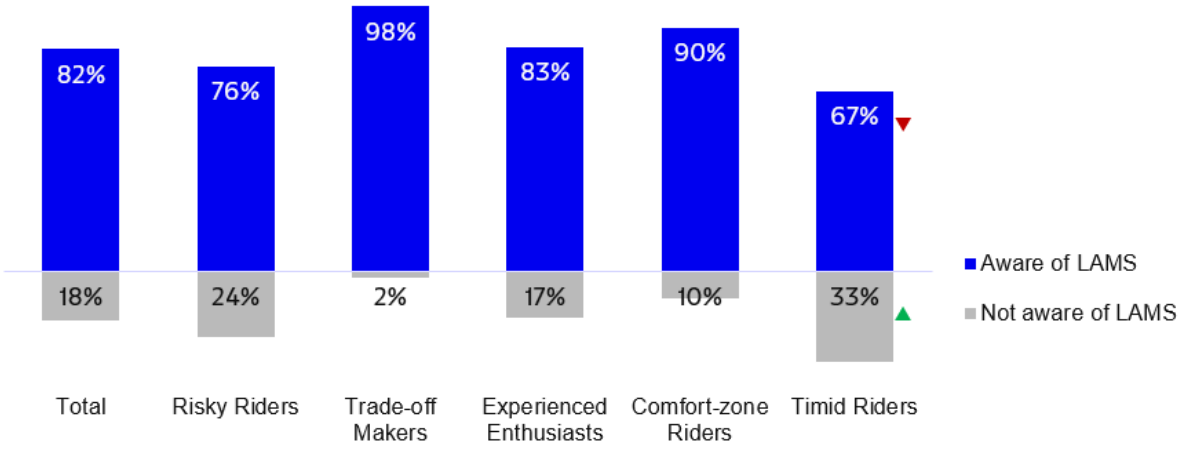


Base: Rider sample (n=912)
D5. If you were considering buying another motorcycle, moped and / or scooter, how important would you say the following safety features are to your decision?

Differences in the levels of awareness of and perceptions towards motorcycle safety features across segments found that education could play an important role among Trade-off Makers who were significantly more likely than other segments to find it difficult to tell how safe a motorcycle is.

There is strong evidence that the Learner Approved Motorcycle Scheme (LAMS) has cut through with a majority of riders (82%) aware of the scheme (**Figure 38**). Where further efforts to raise awareness would benefit are among those who are those who are less engaged with the category (Timid Riders).

Figure 38: Awareness of LAMS



Base: Rider Sample (912), Risky Riders (125), Trade-off Makers (132), Experienced Enthusiasts (221), Comfort-zone Riders (190), Timid Riders (244)
D8A - Prior to today, were you aware of the Learner Approved Motorcycle Scheme (LAMS) that allows novice riders (on L, P1, or P2 licences) to ride only lower and moderately powered motorcycles or scooters?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

Implication for TfNSW: *Assumptions about the safety of motorcycles sold in Australia means that riders exhibit fairly low engagement on this topic and have a tendency to deprioritise these features when making purchase decisions. However, there was no push-back from riders*

towards motorcycles having these features, rather, it was that they were not a leading consideration. There is an opportunity to remove the 'choice' for some riders (particularly novice riders and those on their Learners and Provisional Licence) by restricting approved motorcycles to those that have specific safety features, and the findings suggest that this would be accepted.

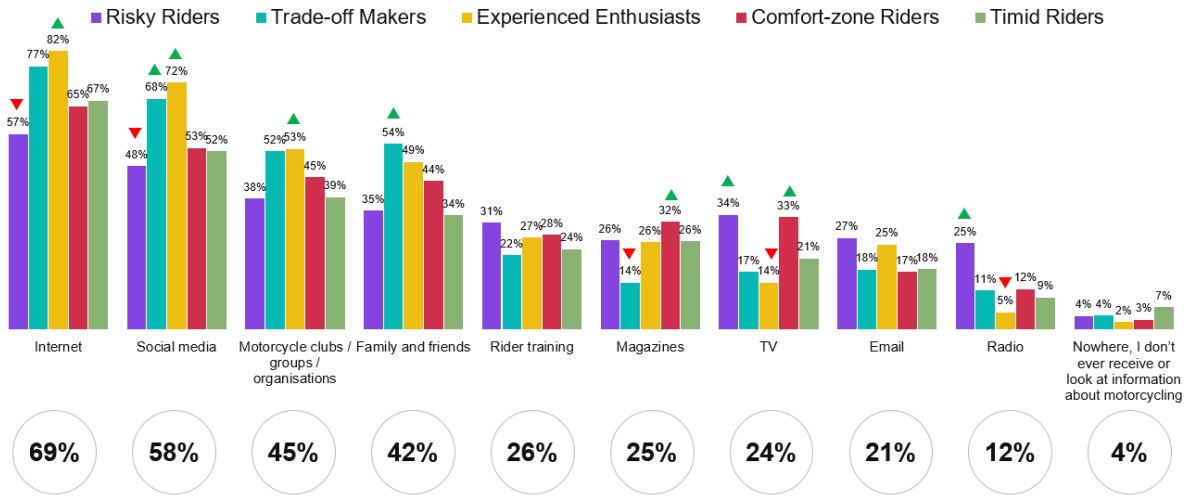
For additional consideration, should riders begin their journey learning on motorcycles with safety features that will shape and establish the way in which they ride and handle their motorcycle, it may be valuable to highlight how motorcycles without these features need to be ridden differently, perhaps at point of sale (for example how to ride a motorcycle with ABS versus one that doesn't not have this). Given that riders claimed to upgrade their motorcycle to something more powerful newly into their Full Licence, and this coincides at a time where over-confidence in their own riding ability is rife, these guidelines or warnings could help riders to safely manage their ride and avoid unintentional unsafe riding behaviours.

Online and social media channels have the most cut through and there is appetite for more information

Almost all riders are engaged enough in the activity to receive information about motorcycling, with the highest cut through in online (69%) and social media (58%) channels, followed by social avenues through motorcycle clubs/associations (45%) and family and friends (42%). A focus on messaging primarily through these channels and perhaps with the cooperation of motorcycle associations is most likely to reach riders with messages that resonate (**Figure 39**).

Although it has less mass reach, rider training is also a useful touchpoint to communicate detailed information and strategies to riders – in particular, this may be an effective avenue to communicate to the riskiest Risky Riders (who are also the least experienced segment) detailed information in an engaging and practical setting.

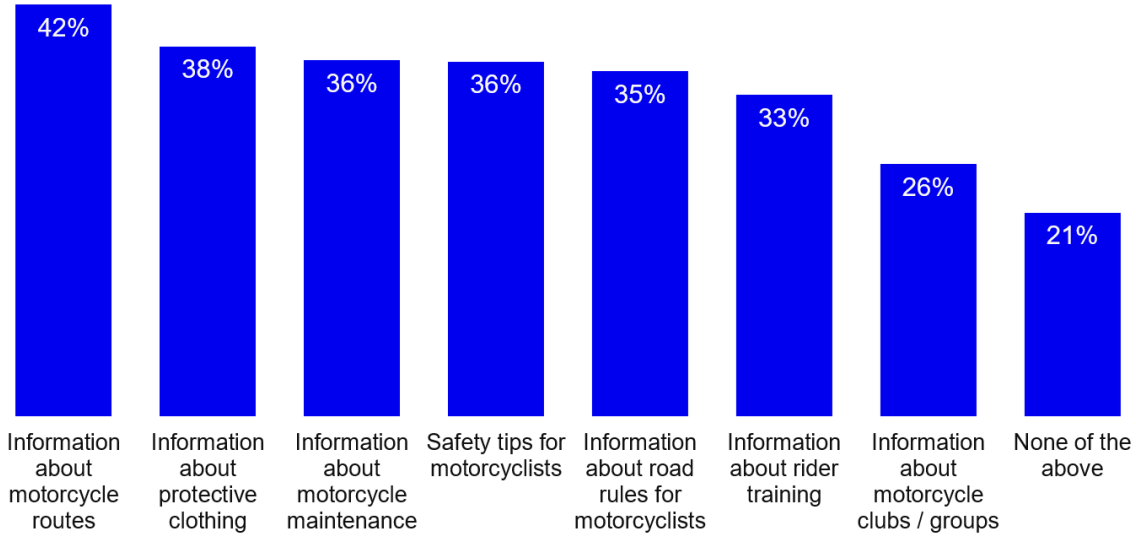
Figure 39: Sources of information for motorcycling by segment



Base: Rider Sample (912), Risky Riders (125), Trade-off Makers (132), Experienced Enthusiasts (221), Comfort-zone Riders (190), Timid Riders (244)
E3 - Where do you get information about motorcycling?
▲▼Indicates a significant difference at a 95% confidence level from overall sample

The appetite for information about riding and motorcycles is even spread, with no significant differences between the segments. Encouragingly, the data shows an appetite for information regarding protective clothing, suggesting low hanging fruit for those who are unaware of the CRASH and MotoCAP ratings for gear (**Figure 40**). For more information regarding the sources of information data, please refer to the appendix.

Figure 40: What information about motorcycling would you like to have which isn't currently available?



Base: Rider Sample (912)
E4 - What information about motorcycling would you like to have which isn't currently available

Implication for TfNSW: *Distributing communications about motorcyclist safety should utilise social media, web pages where riders view motorcycling content (for example, YouTube, motorcycling retailers, TfNSW website), and motorcycle groups to maximise reach.*

The development and communication of content regarding motorcycling routes, protective clothing, motorcycle maintenance, safety tips, road rules, and rider training might be considered to address riders' interest in knowing more on these topics.

Conclusions & Recommendations

The research informed ten (10) conclusions and recommendations for TfNSW to consider to support the organisation's current and future initiatives that seek to promote the safety of motorcyclists and safe riding behaviours. This includes the identification of points for intervention, thematic territories for future communication campaign development, information and knowledge gaps to address, strategies to encourage the uptake of owning and wearing protective gear, and the opportunity to leverage tools (such as mandates and incentives) to increased desired safety behaviours.

Each conclusion and recommendation is underpinned by a collection of insights that have been detailed in the main report.

1. Learners and Provisional tests are opportune moments to intervene with key safety messages – the need exists and the audience are captive

Further utilise the moments when riders are sitting their Learner and Provisional tests to engage them with training courses, MotoCAP and CRASH, and establish the benefits of different types of safety gear. There is evidence that this type of information is relevant to riders at these points in time and address attitudinal and behavioural traits characteristic riders at these stages. Specifically, TfNSW might consider linking in mandates as part of obtaining the licence, for example a requirement of the Full licence might be proof of purchase of specific items of protective gear, or concessions linked to the participation in training courses. Collectively, intervening at these points supports a preventative approach to safety by encouraging the formation of safe behaviours turn habits during the learning stages of riding.

2. The research revealed seven communication themes that resonate with riders. These warrant further exploration to inform the development of a new motorcyclist safety behavioural campaign

Theme	Description	Segment resonance
More similar than you know	This idea seeks to show riders that different types of rides have more in common than they think and that there is no situation where protective gear and safety features are not necessary or relevant.	Trade-off Makers, Experienced Enthusiasts, Risky Riders mostly But also Comfort-zone Riders and Timid Riders
Peace of mind	This idea draws on the fact that the emotive territory of peace of mind is universally motivating as a reason to wear protective gear. This might seek to reinforce positive behaviours and encourage wearing gear more frequently (rather than attempt to convert riders who rarely wear protective gear) as well as empower riders to advocate for the benefits.	Timid Riders, Comfort-zone Riders, Experienced Enthusiasts
There's always a risk	This idea might seek to address specific cases where the perception of risk is minimised by riders and recalibrate their assumptions. Examples of assumptions/perceptions that might be challenged and corrected: moped/scooters	Risky Riders, Trade-off Makers, Comfort-zone

	are more casual and are easier to balance on, crashes are unlikely on short rides, 5km over the speed limit is not speeding.	Riders, Experienced Enthusiasts
Riding culture	This idea might leverage language, attitudinal or behavioural codes from riding culture to foster social norms around safe riding and usage of protective gear.	Experienced Enthusiasts, Comfort-zone Riders
Do your part	This idea draws on the concern that riders have for how they are perceived by other road users and desire to protect the reputation of the riding community. There is potential to motivate riders to do the right thing by engaging them with the message that every rider has a part to play.	Trade-off Makers, Experienced Enthusiasts, and Comfort-zone Riders mostly But also Risky Riders and Timid Riders
Riding rituals	This idea taps into the evidence that creating a ritual around wearing protective gear habitualises the behaviour and reduces permissibility for not 'gearing up'.	All riders
Be visible	This idea directly speaks to the leading safety concern of riders and offers a solution to not being seen by drivers and the desire to intercept any inattentiveness drivers exhibit on the road. Reframing the benefit of wearing protective gear as a way to be seen by other road users would be a unique way to talk to riders about wearing gear when riding.	All riders

Themes found to have less resonance include: crashes (for example reminding riders of the experience of a crash to prompt safer riding behaviours) and overconfidence and perceived skill (for example a reality check that undermines overconfidence or messages that speak to 'no amount of skill can prevent…').

3. Drivers were seen as playing a joint role in the safety of motorcyclist. However, drivers' misunderstanding of some rider behaviours indicates a knowledge gap to be addressed

Look to close the gap on misconceptions held among drivers in relation to riding to extend the existing goodwill to understanding, mutual respect and empathy. TfNSW might explore a communication campaign with drivers as the target audience that helps them to see the road from the riders' perspective for example, why some riding behaviours might look dangerous to drivers but help riders be safe (such as lane filtering), or how the actions of drivers unintentional or otherwise influence a riders' response (such as what the front wheels of a car tell riders, or what riders need to do in the event of a car changing lanes suddenly). TfNSW is the most credible voice to communicate to drivers on this topic.

4. Motivating motorcyclists to wear protective gear will require different levers, either taking a rational or emotive approach. There may also be the opportunity to further explore levers that are not current top of mind but that speak to the leading safety concerns of riders

Messaging on protective gear should align to the core motivations of different riders:

- Leverage emotive messaging for lower risk segments (Experienced Enthusiasts, Comfort-zone Riders, Timid Riders) including peace of mind, confidence, and self-expression.
- Leverage rational messaging for Trade-off Makers including protection, being visible, and signalling to other road users.

There is an opportunity to further explore messaging that speaks to protective gear as a means to being highly visible to drivers. Whilst this was seen as an important benefit of protective gear, currently riders seldom thought about this advantage as reason to wear. Given that riders' leading safety concern is not being seen by drivers and the inattention of drivers, this could provide a fruitful lever to explore.

5. Types of protective gear present different challenges – efforts should be focused to reduce the right hurdle: barriers to owning versus barriers to wearing

Protective gear item	Challenge to overcome	Barriers to address
Riding Jacket	Encourage wearing	Address barriers of discomfort (too hot), storage when they reach their destination, and perceptions it is not always necessary
Riding Pants	Encourage wearing	Address barriers of discomfort (too hot), inconvenience (time spent to put on, unable to wear it over other clothes they want to wear at their destination), storage when they reach their destination, and perceptions it is not always necessary
Riding Gloves	Encourage purchase	Overcome misconceptions that they are not relevant for novice riders and that they provide little protection in the event of a crash (once riders own gloves there is high uptake of wearing)
Riding Footwear	Encourage purchase and wearing	Overcome misconceptions that they are not relevant for short or local trips or riding mopeds/scooters Address barriers of discomfort and storage when they reach their destination
Other riding gear (e.g. armour, braces)	Encourage purchase and wearing	Support riders to identify rides where this additional protective gear is relevant (for example long rides, off-road) and encourage purchasing of gear that has these features built in and can be worn for the purposes of commuting or short distance leisure trips also.

6. Mandating ABS/traction control for LAMS approved motorcycles is unlikely to be met with resistance. However, consideration should be made for cases where learning to ride on motorcycles with certain safety features would lead to the establishment of riding habits that may impact how safely a rider can manage their motorcycle should they transition to other motorcycles without these features

Consider mandating ABS/traction control features for LAMS approved motorcycles. Additionally, working with providers of rider training courses or the licencing scheme as intervention points to communicate and educate riders on how to manage different types of motorcycles, particularly those that do not have these features and where the riding experience might be vastly different.

7. **There is a need to navigate the assumptions riders make about the safety of motorcycles and protective gear sold in Australia. MotoCAP and CRASH could play a role here**

Raise awareness of MotoCAP and CRASH among the broader riding community. There is an opportunity to further utilise this activity to educate riders on how to tell the quality of gear and the level of protection that it offers in general, not just relating to helmets, including the indicators or ratings to look for.

8. **There is openness to mandating the wearing of protective gear, particularly for novice riders, however scepticism over how this will be enforced leads riders to think they can get away with not adhering**

In considering the mandate of protective gear, TfNSW may wish to look towards the mandate of *owning* gear in the first instance. This is particularly relevant for items where the main barrier to usage is not wearing, but purchase (among those who own the item a very high proportion wear the item most or all of the time) such as gloves.

Additionally, acceptance towards the idea of mandating the wearing of protective footwear and gloves for novice riders is an opportunity to instil a standard of behaviours at the start where there is traction for these to become habitualised. This would also address the fact that novice riders are less likely to own protective gear in their early years and opens up the risk that they will avoid investing in it later due to perceptions that it is not necessary.

9. **Incentives are likely to have a positive impact on the uptake of protective gear and helmets, especially if they meaningfully bring down the cost to participate in the hobby**

Should TfNSW explore an incentive program to motivate usage of protective gear amongst riders, discount off registration fee and discount/ coupon off clothing cost would be most compelling.

10. **Social media and web pages related to riding are the optimal channels to engage riders with information about motorcycling and safety**

Distributing communications about motorcyclist safety should utilise social media, web pages where riders view motorcycling content (for example, YouTube, motorcycling retailers, TfNSW website), and motorcycle groups to maximise reach.

Riders welcome further information about a variety of topics including motorcycling routes, protective clothing, motorcycle maintenance, safety tips, road rules, and rider training.

Segment Bibles

[PLACEHOLDER FOR SEGMENT BIBLES TO BE INSERTED]

Appendix

Appendix A: Analysis Approach

Weighting approach

To ensure the data was as representative of their respective populations as possible, both the rider and driver samples of the quantitative study were weighted by age and gender before analysis. Given limited information on the representative demography of motorbike passengers, the passengers sample was left unweighted.

Rider Sample Weighting

The rider sample was weighted by age and gender. Based on external public data on current rider licence holders, gender weights of approximately 13% for females and 76% for males were applied, in accordance with the gender proportions of current rider licence holders in NSW as reported by the TFNSW Registration Snapshot Report Dashboard as at 21/8/23 (https://www.transport.nsw.gov.au/data-and-research/drives-reporting-portal/registration-snapshot-report).

Figure 41: Gender proportions – survey vs. current licences data

	Survey	Current licences
Male	76%	87%
Female	23%	13%

Weights were also applied to age brackets in the sample (18-24, 25-34, 35-44, 45-54, 55-64, 65+). However, the public data available regarding current registrations was considered an inaccurate representation of the survey's target population of motorcycle/moped/scooter riders in the last 6 months. This is because:

- The target audience focuses on recent riders (last 6 months) while the publicly available data includes many inactive riders.
- The rider licence renewal process (being maintained in tandem with other licences the individual may hold, such as a drivers licence) leads to low rates of attrition in licence holders as they age.
    - For example, an individual can obtain their rider licence at age 23 and maintain it indefinitely along with their car licence for no extra fee, providing little incentive to remove the rider licence, even if they have not ridden a motorcycle in deacdes.
    - This is represented in the current licence data, where there is no observed drop-off of current licence holders in the higher age brackets. The data seems to show most people who have a rider licence will obtain one by their mid-late 30s, and simply maintain it for the rest of their life. A large proportion of older rider licence holders are unlikely to be regular or recent motorbike riders.
- The spirit of the key objectives are about identifying groups at highest risk and should reflect a population of riders that are actively riding, not just carrying a rider licence

As a result, it is not necessary or accurate to weight the sample by age according to the licencing data as it will unduly upweight older riders. Instead, to capture representativeness of the 'last 6 months' cohort or recent riders, the overall data was weighted to the proportions of the panel sample. This is because:

- The online panel completes are the result of natural fallout against the major screening criteria (ride a motorbike, scooter/moped in the last 6 months) defining the target active riding cohort.
- The age of panel respondents was significantly younger than the age of open link respondents,

Age group weighting was applied to the rider sample in totality (with both panel and open link rider respondents included) according to the age proportions of the representative panel sample. For more information on the rationale for merging the panel and open link samples for analysis, please see **Appendix B**.

Figure 42: Age proportions – survey vs. current licences data

	Survey	Current licences
18-24	10%	4%
25-34	23%	14%
35-44	24%	18%
45-54	16%	21%
55-64	16%	21%
65+	11%	22%

Final weighting scheme

To summarise, the rider sample was weighted by age and gender – using gender proportions from the publicly available data on current rider licence holders and using age proportions from the natural fallout of L6M riders in the panel sample. The final weighting scheme is as follows below:

Figure 43: Final weighting scheme (Riders) – unweighted vs. weighted proportions (% of total sample)

Total % of sample	Survey sample (unweighted, panel + open link)		Weighted proportions	
Age Group	*Male*	*Female*	*Male*	*Female*
18-24	6.4%	3.3%	11.2%	1.7%
25-34	15.8%	6.8%	29.1%	4.4%
35-44	17.5%	6.9%	27.4%	4.1%
45-54	12.2%	3.6%	10.4%	1.6%
55-64	13.2%	2.4%	4.7%	0.7%
65+	11.1%	0.4%	4.1%	0.6%
Total	**76.1%**	**23.5%**	**86.8%**	**13.1%**

As shown above, the final weighting scheme upweights younger males in the sample (18-44). This is also the portion of the sample where we have the highest numbers of respondents (n=483 riders in total – n=376 from the online panel and n=107 from the open link).

Driver Sample Weighting

A similar need for weighting was seen in the driver sample, where the natural fallout of drivers came as a result of them first being ineligible to be part of the rider sample. This meant that

natural fallout was influenced by rates of eligibility for the rider sample, an unavoidable by-product of the questionnaire screening process and the priority of finding respondents for the rider cohort. A simple age and gender weighting of the driver sample was used to ensure results were not overrepresenting the views of demographic groups.

Note: A major change from the previous 2012 study was to ensure the driver sample did not include riders in the last 6 months (i.e., drivers who could have otherwise qualified to be in the rider sample). This means the driver sample represents a cohort of drivers without recent experience as a rider.

In a similar approach to the weighting of the rider sample, the publicly available data as reported by the TFNSW Registration Snapshot Report Dashboard as at 21/8/23 was used. Unlike with rider licences, the proportion of licence holders who had driven in the last 6 months was considered much more representative of car licence holders in general. Driving is a much more common activity than riding – the demographic proportions of the car licence population are likely reflective of the demographic proportions of recent and active drivers (in the last 6 months). Therefore, the age and gender proportions of active car licences were used as the basis for weighting the driver sample.

The changes are summarised below:

Figure 44: Final weighting scheme (Drivers) – unweighted vs. weighted proportions (% of total sample)

% of total sample	*Unweighted*		*Weighted*	
Age Group	*Male*	*Female*	*Male*	*Female*
18-24	3.2%	4.2%	5.0%	6.1%
25-34	4.3%	8.1%	8.3%	10.1%
35-44	5.0%	7.8%	8.6%	10.5%
45-54	4.5%	6.2%	7.4%	9.1%
55-64	6.9%	11.6%	6.5%	7.9%
65+	19.5%	18.6%	9.2%	11.3%
Total	**43.3%**	**56.5%**	**45.0%**	**55.0%**

Appendix B: Differences between open link vs. panel sample

Similar to the previous 2012 study, an open link version of the rider survey was utilised to supplement sample coming from a more controlled and representative online panel source. Where in the previous 2012 study, the analysis included comparisons between the open link and panel sample, in this report, the analysis is based on a weighted sample containing both open link and panel respondents. For more information on weighting, please refer to Appendix A.

The rationale for merging the sample for analysis is as follows:

- Convenience and understanding of analysis: The results of this study and analysis of the quantitative data is enhanced by using a merged sample. This avoids extensive comparisons between the two samples across the questions, and instead focuses on patterns within riders themselves.
- Adequate sample for the segmentation: For the creation of a robust segmentation model of the population, a target sample of n=1000 is typically standard with higher samples up to n=2000 preferred if possible. It is critical to the robustness of the segmentation that the open link respondents be included in the segmentation model. The merged data was weighted in accordance with Appendix A prior to segmentation.
- Difficulty of recruiting rider respondents: Due to the practical constraints of identifying and recruiting respondents who fit the core criteria for riders (riding a motorbike, scooter/moped in the last 6 months in NSW) both the open link and panel sample were intended to be utilised in the main analysis and collapsed into a single merged and weighted sample.

Major Differences between Open Link and Panel Samples

A summary of the key demographic differences between the two samples is below:

- The panel sample had significantly more females than the open link panel
- The open link sample was significantly older and more experienced with riding, having held a licence on average much longer than the average respondent from the panel sample.
- The open link prefers leisure bikes, both on-road and off-road, while there is a higher concentration of moped/scooters and daily commuter motorbikes.
- Overall, the open link sample generally skewed more experienced and more engaged with riding as a hobby, acknowledging that both samples had the basic criterion that riders had engaged in the activity at least once in the last 6 months and therefore were by default a more engaged audience overall.

Figure 45: Unweighted Demographic Proportions – Panel vs. Open Link Sample

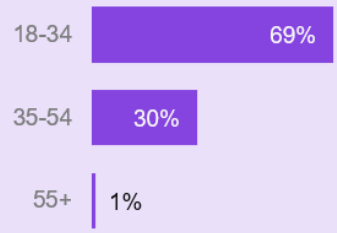
	Column %	Panel	Open link	NET
Gender	Male	63%	91%	76%
	Female	36%	9%	24%
	Identify in some other way	1%	0%	0%
Age	18-24	14%	5%	10%
	25-34	32%	7%	21%
	35-44	31%	14%	23%
	45-54	13%	21%	17%
	55-64	6%	31%	17%

	65+	5%	22%	13%
Metro/ regional	Capital city (i.e. Sydney)	64%	64%	64%
	Regional	36%	36%	36%
Licence type	Learner licence	5%	1%	4%
	Provisional P1 licence (red)	9%	3%	6%
	Provisional P2 licence (green)	6%	1%	4%
	Full licence	79%	95%	86%
Years holding a rider licence (not including time on Ls)	0-2 years	24%	6%	15%
	3-5 years	27%	9%	19%
	6-10 years	19%	12%	16%
	11+ years	24%	73%	46%
Main type of bike	Off-road leisure	29%	40%	34%
	On-road leisure	43%	68%	54%
	Commuter/ daily use	36%	21%	29%
	Moped/Scooter	26%	11%	19%

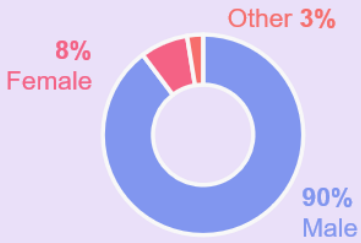
DEMOGRAPHICS

RIDERS

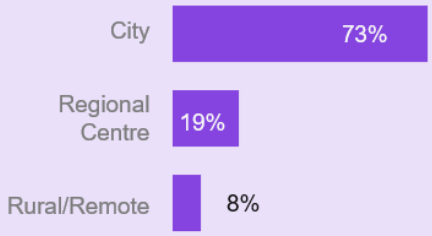
Age



Gender



Location



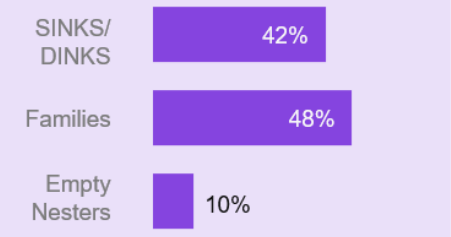
CALD

31% Yes

ATSI

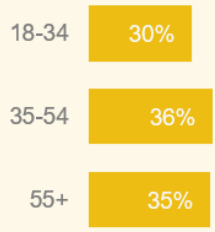
21% Yes

Household

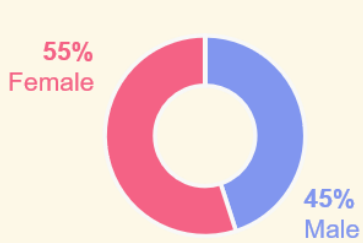


DRIVERS

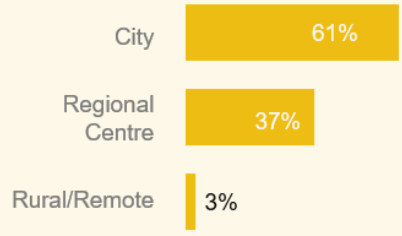
Age



Gender



Location



CALD

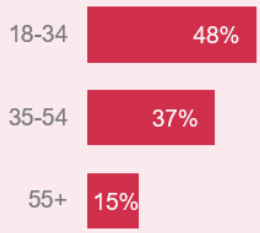
22% Yes

ATSI

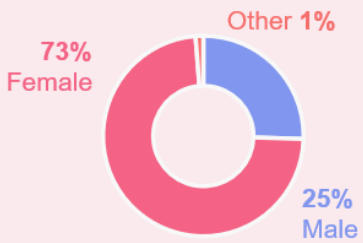
5% Yes

PASSENGERS

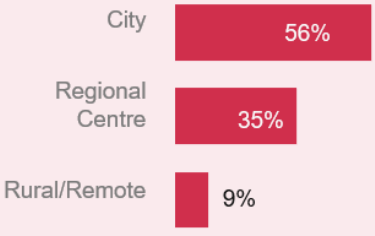
Age



Gender



Location

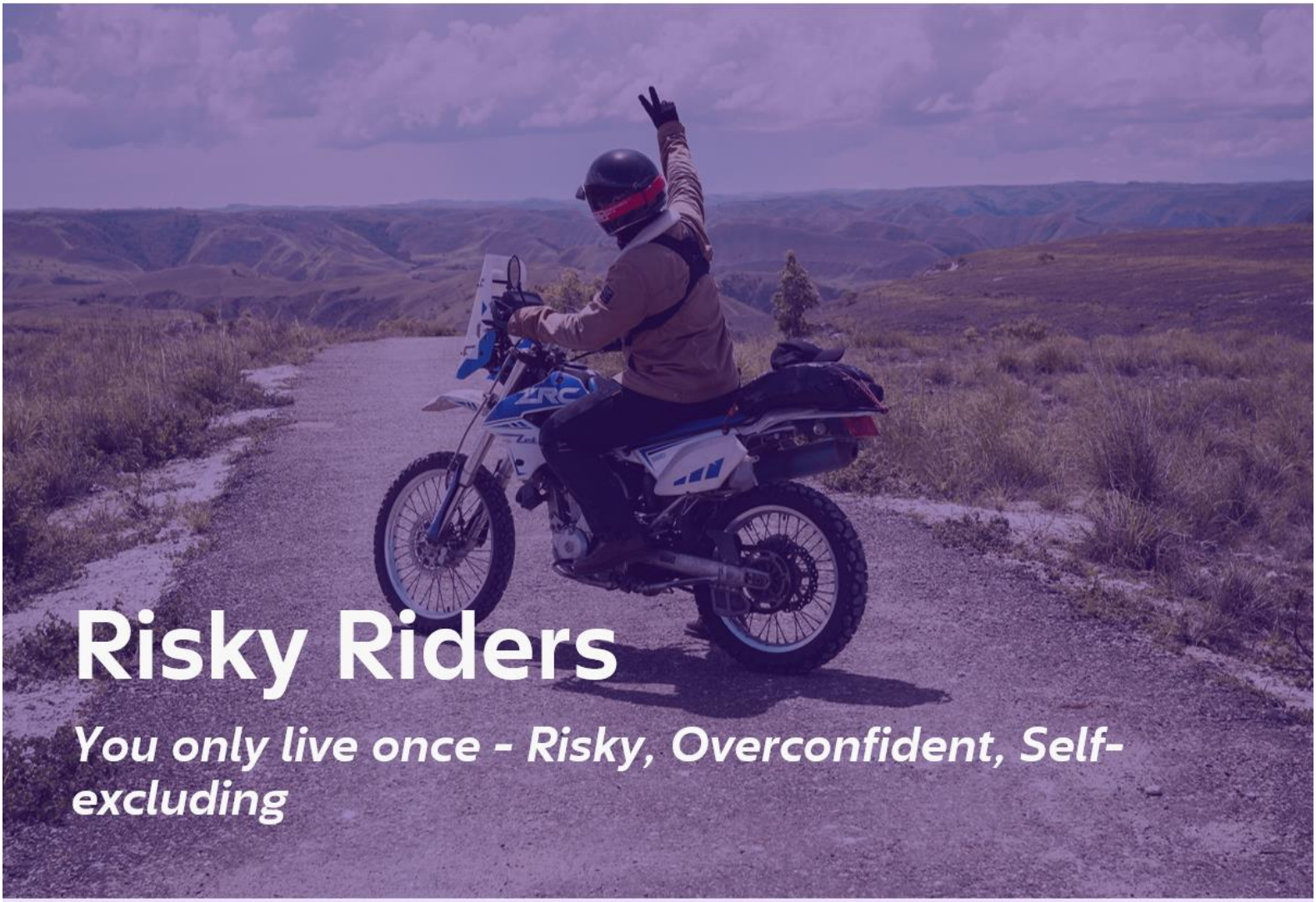


Base: Rider sample (912), Driver sample (948), Passenger sample (161)
S7. What is your age?; S8. What gender do you identify as?; S10. Which of the following would you say is your main mode of transport?; E2B. Which of the following best describes your household situation?; E1. Do you identify as Aboriginal or Torres Strait Islander?; E2. Do you speak a language other than English at home?; S9A. Which best describes the area that you live in?

TFNSW Motorcyclist Segmentation Bible

NSW GOVERNMENT Transport for NSW

Hall & Partners



Risky Riders

You only live once - Risky, Overconfident, Self-excluding

In light of the growing number of motorcyclist licence holders in NSW, Transport for NSW sought to better understand this target audience to inform future policy decisions, programs, and communications around motorcyclist safety.

NSW motorcyclists are not a homogenous group. Our research revealed 6 segments of riders, each with the own set of attitudes, behaviours, and beliefs in relation to riding, risk, and safety:

Risky Riders	Trade-off Makers	Experienced Enthusiasts	Comfort-zone Riders	Timid Riders	Occupational Riders

This document provides a summary of the key characteristics of the **Risky Riders** segment and tips for how to win their hearts and minds to encourage safe riding behaviours.

The segmentation represents NSW riders who have ridden in the last 6 months at the time of research.

SIZE OF SEGMENT

20%

KEY SEGMENT FEATURES

- High propensity to engage in risky riding behaviours (e.g., speeding, overtaking)
- Relaxed and permissible attitudes towards safety and the necessity of protective gear
- Less concerned about safety when riding
- High self-perceived riding skill
- More likely to go with their heart than head
- Less open to new information or being told how to ride

DESCRIPTION

Risky Riders

These riders **enjoy the thrill** of the ride and **risk is just part of the package** when it comes to riding a bike, and for some it is perhaps part of the appeal.

Commuting is a big part of their riding (to and from work/study, but also to social events) but that is not to say they don't enjoy it. Riding is an activity they do a lot, and they are **open to trying different bikes and different rides**, including off-road leisure bikes and riding on private land and state/national parks.

These riders tend to have a much more **laissez-faire attitude towards safety and taking risks** on the road and tend to feel like their destiny is not entirely in their own hands. They are less concerned about safety in general and there is a level of **permissibility** about things (such as alcohol and drugs) that are a no-go for other segments.

Many would say they **go with their heart** rather than their head when it comes to riding and that **nobody can tell them how** to ride. This goes hand in hand with their perception of themselves as excellent riders, even though they **skew less experienced** than other segments. They exhibit a good dose of **overconfidence.**

When it comes to gear, this 'devil may care' attitude to safety seems to permeate, **less likely to own gear**, and **less likely to wear it** when they have it, they have a variety of excuses when it comes to why they don't.

> "I think I'm probably too confident as a rider. That's probably a bad thing... oh well

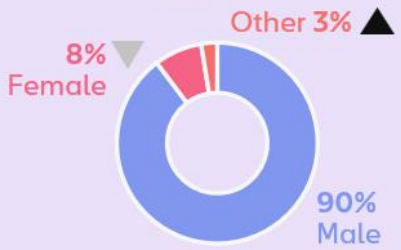
DEMOGRAPHICS

Risky Riders are predominantly younger riders aged 18 to 35, mostly male, and the motorcycle is their main mode of transport around the city. Unlike other segments, Risky Riders skew towards no children with 50% of them falling into the SINKS/DINKS category, likely a reflection of their younger age.

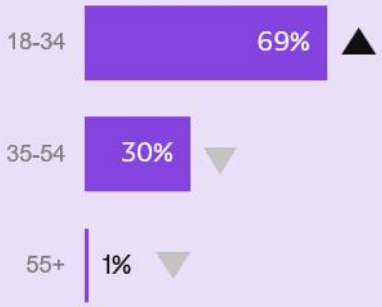
Risky Riders is set apart for its diversity. It encompasses a higher proportion of Aboriginal and Torres Strait Islander riders and culturally linguistically diverse riders, reflecting the melting pot of cultures and backgrounds that define modern cities.

"There'll be occasions where I'll probably go 10 or 15kms over."

Gender

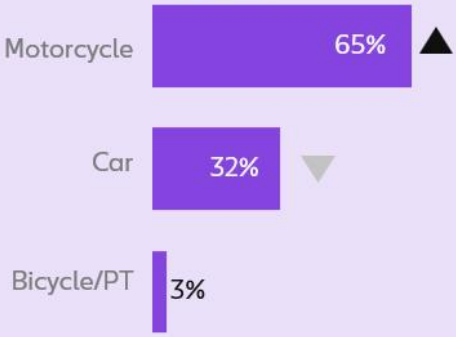


Age



Household

Main mode of transport



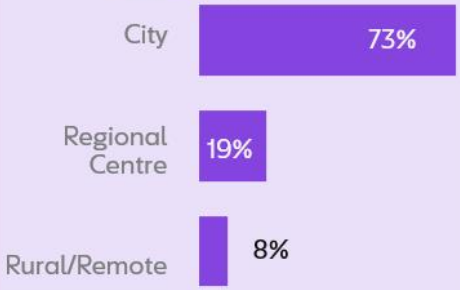
CALD

31% Yes ▲

ATSI

21% Yes ▲

Location



Base: Total sample (912), Risky Riders (125)
S7. What is your age?; S8. What gender do you identify as?; S10. Which of the following would you say is your main mode of transport?; E2B. Which of the following best describes your household situation?; E1. Do you identify as Aboriginal or Torres Strait Islander?; E2. Do you speak a language other than English at home?; S9A. Which best describes the area that you live in?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

SEGMENT SNAPSHOT

As city dwellers, Risky Riders are more likely than other segments to ride mopeds and scooters, zipping through city traffic with ease. While they primarily navigate city streets, they are not confined by them and this segment is more likely to explore private land and venture off the beaten path, seeking uncharted territories. Because of this, Risky Riders are more likely to own off-road leisure bikes, allowing them to escape the city's confines. This segment also hold a greater proportion of Learner/P licence holders (22%).

Comradery is an important part of their riding experience with 45% of them riding with others always or often. Confidence is a key characteristic, and while they skew less experienced than other segments, they carry a high self-perceived riding skill.

LICENCE TYPE

78%	Full licence ▼
22%	Ls/Ps ▲

YEARS EXPERIENCE

37%	0-2 years ▲
33%	3-5 years ▲
21%	6-10 years
6%	11+ years ▼

RIDING WITH A PASSENGER

Never | Sometimes/Rarely | **Always/Normally**

▼ ▲

RIDING WITH A GROUP/OTHERS

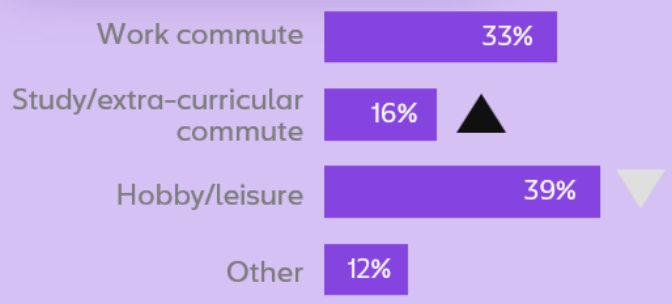
Never | Sometimes/Rarely | **Always/Normally**

▼ ▲

MAIN TYPE OF BIKE*

▲ ▼

REASON TO RIDE



▲ ▼

WHERE THEY RIDE

▲ ▼

PERCEIVED SKILL LEVEL (Beginner-Expert)

Beginner – 5 | 6 – 7 | 8 – 9 | **Expert**

Base: Total sample (912), Risky Riders segment (125)
A4. Where do you do most of your riding?; A5B. Main reason for riding?; A6. How much of your riding is done with others or in a group?; A7. How much of your riding is done with a passenger?; A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being expert. A2B. And which of the following best describes the type you ride most often?; S4. What is your motorcycle licence? S5. How long have you held a motorcycle licence?
*Off-road leisure: off road bike, trail bike, adventure, motorcross / On-road leisure: sports bike, sports tourer, tourer/cruiser, motor trike / Commuter/daily use: standard road bike, electric, moped, scooter
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

RISK IS AN EMBRACED PART OF THE RIDE

This segment are naturally more likely to be thrill seekers - riding a motorbike is an accessible and easy way to get their kicks. As risk is part of the appeal, this segment will push the limits of what is allowed when they are out on the road. A clear example of this, is their attitude to speed. For this segment, speed restrictions are a target to be reached and exceeded, speed is not a limit even in adverse conditions (like wet weather).

ATTITUDES TO SPEEDING

33% More likely to agree speeding is **not taking a risk** (vs. 17% of all riders)

42% More likely to **ride over the limit** if they are sure they won't get caught (vs. 25% of all riders)

55% Less likely to always reduce their speed **on wet roads** (vs. 87% of all riders)

This embraced attitude to risk extends beyond speeding and into other riding behaviours - this segment are more permissive of taking risks which are off-limits for others including riding under the influence of drink and/or drugs, as well as answering their phone.

WOULD NEVER RIDE &...

53% Drink **alcohol** (vs. 76% of all riders)

61% Take **drugs** (vs. 87% of all riders)

39% Answer the **phone** (vs. 70% of all riders)

Even if they are involved in an accident as a result of their behaviours, it is seen as a badge of honour and is part and parcel of thrill seeking – 43% agree that surviving an accident makes them feel invincible (compared to just 13% of all riders).

"As a kid I was quite risky. I mean I would expect to fall off every time I went out, but you were always pushing, pushing the limits. Drink, drugs, speeding...it was all a bit risky. Most of my scars are from then, along with the missing teeth, broken ribs..."

CONFIDENCE IS KING

OVERESTIMATE SKILLS

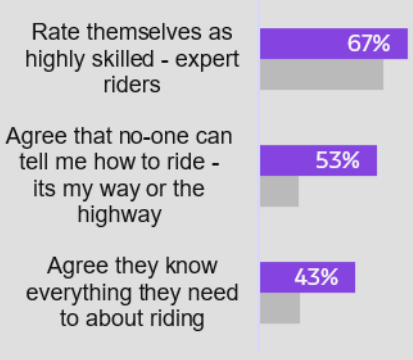
Many in this segment are newer to riding and as such lack the skills and knowledge that come through years of riding experience. However, this deficit causes them to completely overestimate their own competence and capabilities. They strongly believe they are expert riders and do not need advice or guidance from anyone.

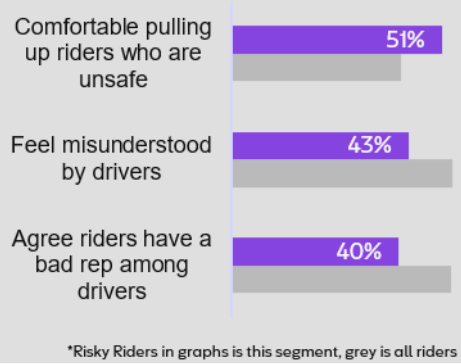
ALL ABOUT ME, ME, ME!

Their confidence knows few boundaries – despite their limited experience, they feel completely comfortable calling out bad behaviour in other riders (while not critically reviewing their own). This confidence also means that they are less affected by how other road users see them – the opinions of drivers are none of their business!

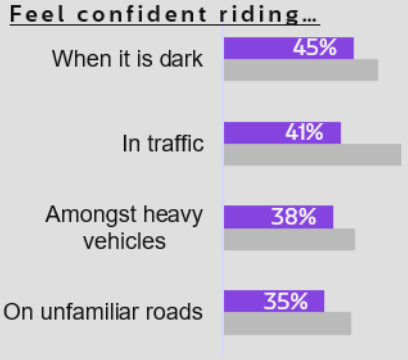
EXTERNAL CONTROL

Interestingly, while this group admit to feeling confident riding without protective gear or if drunk / on drugs / fatigued (i.e. elements which they have control over), they are less likely than other riders to feel confident when conditions are outside of their control (such as when it is dark, when in traffic or on unfamiliar roads).





*Risky Riders in graphs is this segment, grey is all riders



Their confidence and relaxed attitude to risk mean they are unlikely to respond well to be told what to do, how to ride and which protective gear to be worn. However, there are occasions where their confidence dips, and so there is an opportunity to leverage these situations (dark, heavy traffic, unfamiliar roads) to achieve cut through. Mandates may be the most effective way to achieve compliance.

SAFETY CONCERNS

Top 3 Greatest Safety Concerns

Aggressive behaviour of drivers	15% / 20%
Poor road surfaces	13% / 16%
Other road users not seeing motorcyclists	18% / 14%

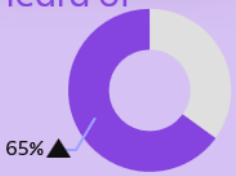
Greatest safety concerns (skews)

Inattention of other drivers	28% / 10% ▼
Heavy traffic / congestion	3% / 7% ▲

SAFETY RATINGS

MOTOCAP

Heard of

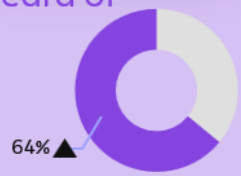


Usefulness

Not applicable	6% / 15% ▲
Not at all useful	4% / 8% ▲
Not very useful	5% / 7%
Somewhat useful	44% / 34% ▼
Very useful	41% / 37%

CRASH

Heard of



Usefulness

Not applicable	5% / 17% ▲
Not at all useful	2% / 6% ▲
Not very useful	6% / 13% ▲
Somewhat useful	44% / 33% ▼
Very useful	43% / 31% ▼

PROTECTIVE GEAR OWNED VS. WORN

Gear Currently Owned

Helmets	98% / 93% ▼
Jackets	97% / 91% ▼
Pants	92% / 86% ▼
Footwear	90% / 77% ▼
Gloves	72% / 30% ▼
Other Gear	59% / 68% ▲

Gear Owned vs. Worn

Helmets	77% ▼	93%
Jackets	64% ▼	91%
Pants	66%	86%
Footwear	53% ▼	77%
Gloves	25% ▼	30%
Other Gear	49%	68%

BARRIERS TO OWNING AND WEARING

Barriers to owning

Top 5

Too expensive	37% / 32%
I'm not sure what else I need	25% / 24%
Don't think I need it	25% / 24%
I didn't think about it / it's…	13% / 23% ▲
Haven't got around to…	19% / 22%

Skews

I only ride for short trips	15% / 21% ▲
I only ride in quiet areas	9% / 20% ▲
I rarely ride my bike	8% / 18% ▲
Limited options aesthetically	11% / 17% ▲
Only do country / off-road riding	6% / 17%

Barriers to wearing

Top 5

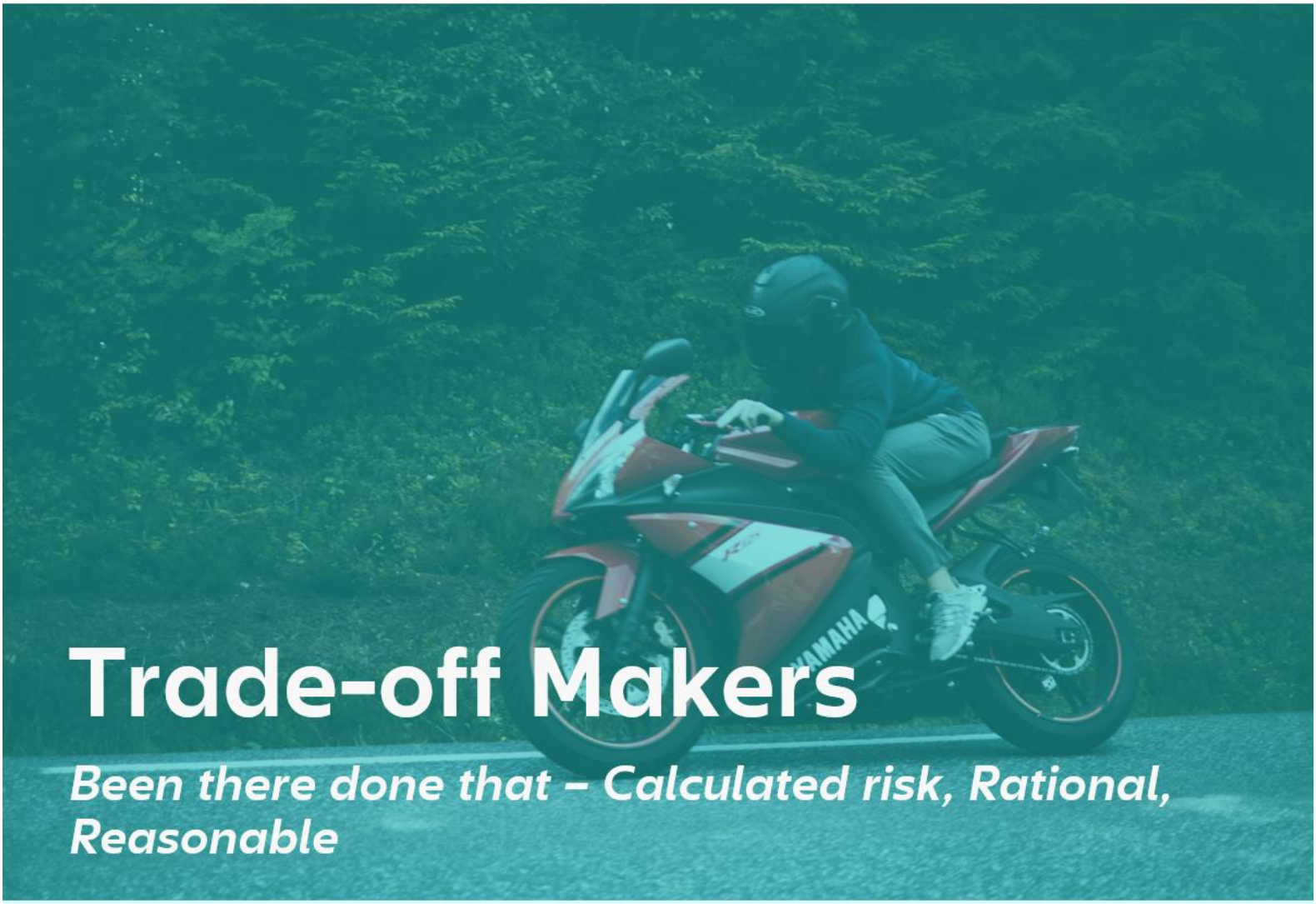
It's only necessary for some rides	24% / 27%
I get too hot when I wear it	27% / 24%
Takes too long to put on for the types of rides I do	18% / 23%
It's uncomfortable / restrictive to…	21% / 23%
I forget / it's not top of mind	10% / 23% ▲

Skews

I don't want to be seen in all my gear at my destination	10% / 21% ▲
I don't wear all the protective gear when riding by myself	2% / 5% ▲

Base: Total sample (912), Risky Riders segment (125)
C3B. And which would you say is your greatest concern? D1. Which of the following protective gear do you currently own? D2. And how often do you wear the following items of protective motorcycle clothing? D8A. Prior to today, were you aware of the Learner Approved Motorcycle Scheme (LAMS) that allows novice riders (on L, P1, or P2 licences) to ride only lower and moderately powered motorcycles or scooters? D8B. Prior to today, had you heard of the MOTOCAP safety ratings for motorcycle gear? D8C. Prior to today, had you heard of the CRASH safety ratings for motorcycle helmets? D8D. How useful do you find these safety ratings?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

Risky Riders are a key segment of concern for both safety gear ownership and usage. Interventions may require bypassing their decision-making process through mandates.



Trade-off Makers

Been there done that – Calculated risk, Rational, Reasonable

In light of the growing number of motorcyclist licence holders in NSW, Transport for NSW sought to better understand this target audience to inform future policy decisions, programs, and communications around motorcyclist safety.

NSW motorcyclists are not a homogenous group. Our research revealed 6 segments of riders, each with the own set of attitudes, behaviours, and beliefs in relation to riding, risk, and safety:

Risky Riders	**Trade-off Makers**	Experienced Enthusiasts	Comfort-zone Riders	Timid Riders	Occupational Riders

This document provides a summary of the key characteristics of the **Trade-off Makers** segment and tips for how to win their hearts and minds to encourage safe riding behaviours.

The segmentation represents NSW riders who have ridden in the last 6 months at the time of research.

SIZE OF SEGMENT

16%

KEY SEGMENT FEATURES

- Engaging in risky riding behaviours in situations where they feel in control
- Take a rational approach to risk taking
- Think they are responsible for their own safety when riding
- Moderate self-perceived riding skill
- Primarily riding for leisure and enjoyment

DESCRIPTION

Trade-off Makers

These riders are **risky in behaviours but not in attitude** – they approach risk in a **calculated** way considering the trade offs of their decisions. They claim that when they ride they are more likely to go with their head than their heart.

Where they push the boundaries of risk it is **in situations where they feel they can control the outcome** such as taking an opportunity to ride a bit faster on an open road with good visibility, taking more risks or weaving between lanes of traffic on a familiar road, speeding if they don't think they will be caught, answering their mobile phone when riding, or riding under the influence of alcohol *if* they think it is within their limits.

There is a **level of humility** for these riders – unlike their risky counterparts (Risky Riders) they do not think they know it all and **do not overestimate their abilities**. They are also open to change - an experience with a crash can have a strong influence on the way they ride.

These riders get a lot of **enjoyment from riding** and would be devastated if they could not ride again. With many using a car as their main form of transport, riding is mostly for leisure (with many **favouring on road leisure bikes** such as sports bikes, tourers and cruisers) and on occasions where it's convenient and they do not have to worry about transporting others such as kids (most rarely or never ride with a passenger). They enjoy riding a mix or roads, both metro and rural and sometimes a longer trip.

> "I've stopped going really long distances just for the fun of it now. I used to do long rides and ride in the wet. I had a smaller scooter, and I would go on highways and the trucks would pass next to you and you would be shaking. But I don't do that anymore.

DEMOGRAPHICS

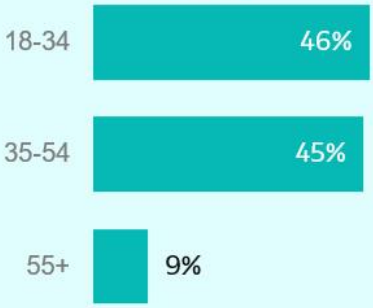
Trade-off Makers are predominantly male city dwellers. Unlike the Risky Riders segment which skews younger Trade-off Makers are a mix of ages with many having kids living at home.

While motorcycles are their passion, many of these riders are pragmatic in their daily travels within the city area and choose a car as their primary mode of transportation, recognising the convenience it offers for transporting kids and running everyday errands.

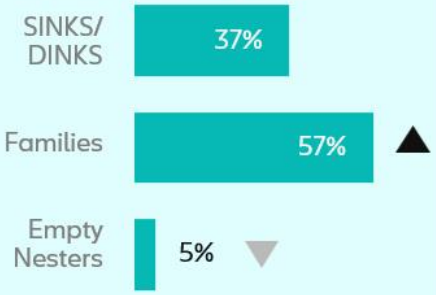
"When I was young, riding in my early thirties, it used to be a different style of riding. It was much rasher, which was not that careful. But now with age, with a family, life has changed. So, my driving style has also changed."

Gender

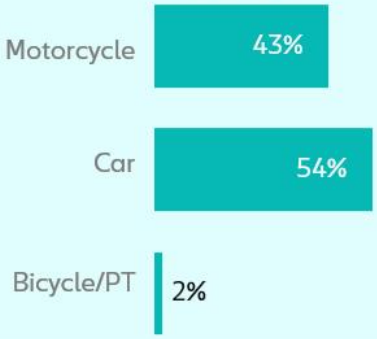
Age



Household



Main mode of transport



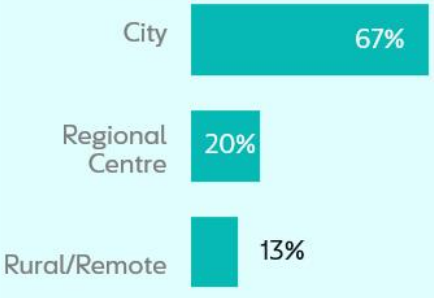
CALD

23% Yes

ATSI

9% Yes

Location



Base: Total sample (912), Trade-off Makers segment (132)
S7. What is your age?; S8. What gender do you identify as?; S10. Which of the following would you say is your main mode of transport?; E2B. Which of the following best describes your household situation?; E1. Do you identify as Aboriginal or Torres Strait Islander?; E2. Do you speak a language other than English at home?; S9A. Which best describes the area that you live in?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

SEGMENT SNAPSHOT

Living in the city, Trade-off Makers view riding mainly for leisure and when it is convenient with most rarely or never riding with a passenger (99%). When they ride, their journey is not confined to metro areas and they take to a mix of roads, from the city streets to the peaceful rural highways. When riding Trade-off Makers favor on-road leisure bikes, with fewer opting for mopeds and scooters in this segment (10%).

While most Trade-off Makers typically have 3 or more years of riding experience, they do not overestimate their abilities. Their self-perceived riding skill remains moderate, a testament to their grounded approach to motorcycling safety.

LICENCE TYPE

83% Full licence

17% Ls/Ps ▲

YEARS EXPERIENCE

12% 0-2 years ▼

28% 3-5 years

20% 6-10 years

35% 11+ years

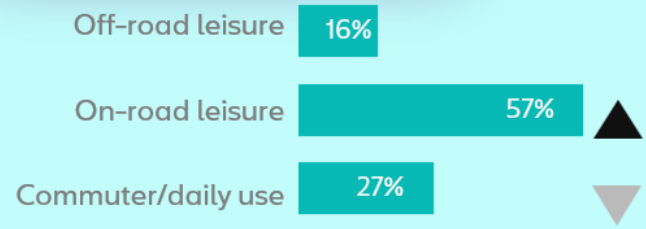
RIDING WITH A PASSENGER

Never | Sometimes/Rarely | Always/Normally

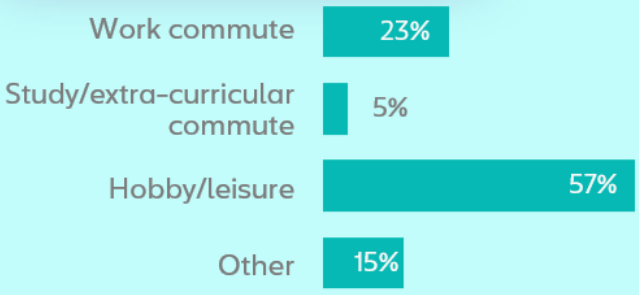
RIDING WITH A GROUP/OTHERS

Never | Sometimes/Rarely | Always/Normally

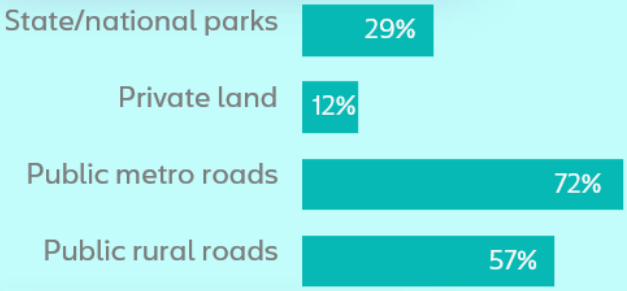
MAIN TYPE OF BIKE*



REASON TO RIDE



WHERE THEY RIDE



PERCEIVED SKILL LEVEL (Beginner-Expert)

Beginner – 5 | 6 – 7 | 8 – 9 | Expert

Base: Total sample (912), Trade-off Makers segment (132)
A4. Where do you do most of your riding?; A5B. Main reason for riding?; A6. How much of your riding is done with others or in a group?; A7. How much of your riding is done with a passenger?; A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being expert. A2B. And which of the following best describes the type you ride most often?; S4. What is your motorcycle licence? S5. How long have you held a motorcycle licence?
*Off-road leisure: off road bike, trail bike, adventure, motorcross / On-road leisure: sports bike, sports tourer, tourer/cruiser, motor trike / Commuter/daily use: standard road bike, electric, moped, scooter
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

RISKS ARE CALCULATED

This segment are somewhat more mature in their attitude to risk when compared to Risky Riders – they still make *some* risky moves, but you are unlikely to find this segment doing wheelies across the Harbour Bridge! They rationally consider each risk, and only take it if they feel comfortable and confident in doing so. Comfort is based on past experiences working in their favour or when they calculate the risk to be relatively low (for example, lane filtering in stationary or slow moving traffic).

LOW RISK BEHAVIOURS

64% Lane filter between **slow moving / stationary traffic** (vs. 51% of all riders)

62% **Take risks on familiar roads** (vs.40% of all riders)

72% Ride **faster than the limit on open roads** where I can see well in front (vs. 45% of all riders)

This maturity in attitude has likely come with experience, past accidents (their own or others) have really changed how they ride. They also have responsibilities at home (partners and children) who are at the forefront of their consciousness when they are out riding.

RESPONSIBLE RIDING

10% **Agree an accident** doesn't change how I ride (vs. 22% of all riders)

15% Agree I ride with **my heart not my head** (vs. 23% of all riders)

Furthermore, riding means a lot to this segment – its not just a means of getting from A to B, its something they do as a hobby and for the pure love of riding. They would be distraught if they could never ride again (86% agreed they would devastated if they could never rider again).

"I think one of the first accidents that made me sit back and take notice was in Wollongong and a fellow came off on a trail bike on the freeway there with thongs and a singlet and shorts on. He was screaming and bleeding and running down the road. He'd taken most of the skin off on both legs and arms back."

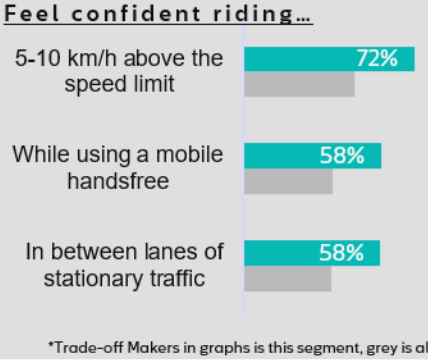
HUMBLE MINDSET

DON'T KNOW IT ALL

Moving away from behaviours, to focus in on their mindset, this segment are extremely humble. They understand their strengths and weaknesses as a rider and are the least likely segment to rate themselves as highly skilled / expert riders. They do not claim to know everything about riding and are happy to take guidance and tips on how to improve their ride.

RISK TOLERANCE

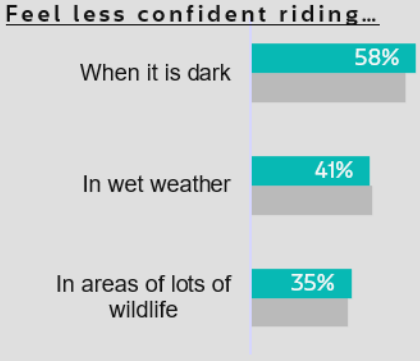
As this segment know their limits both mentally and physically, there are some risks that they are happy to take and some which they are not – they have a threshold for risk tolerance. For example, they feel confident speeding 5-10kph above the speed limit and weaving through stationary traffic.



TOO RISKY

However, there are risks that are too risky for this segment – their head overrules in these situations and as such their behaviours are relatively muted.

"I'll go 10% above the speed limit, but I'm not stupid. I'm think about what I'm doing, especially in the dark or when its wet. I have my limits."



*Trade-off Makers in graphs is this segment, grey is all riders

For this segment, their head plays an important role in driving their decisions especially for high-risk behaviours. Further education and information which nudges perceptions of behaviours out of the 'low risk' bucket will help to facilitate positive behaviour change in this segment.

SAFETY CONCERNS

Top 3 Greatest Safety Concerns

Inattention of other drivers	28% / 42% ▲
Other road users not seeing motorcyclists	18% / 22%
Aggressive behaviour of drivers of other vehicles	15% / 11%

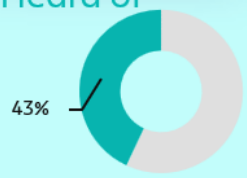
Greatest safety concerns (skews)

Poor road design	3% / 1% ▼
Motorcyclists weaving in and out of lanes to overtake slower traffic	3% / 0% ▼

SAFETY RATINGS

MOTOCAP

Heard of

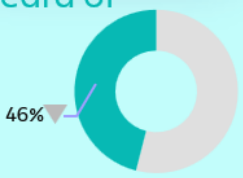


Usefulness

Not applicable	6% / 4%
Not at all useful	4% / 5%
Not very useful	5% / 7%
Somewhat useful	44% / 56%
Very useful	41% / 27%

CRASH

Heard of



Usefulness

Not applicable	5% / 1%
Not at all useful	2% / 2%
Not very useful	6% / 1% ▼
Somewhat useful	44% / 59% ▲
Very useful	43% / 37%

PROTECTIVE GEAR OWNED VS. WORN

Gear Currently Owned

Helmets	98% / 99%
Jackets	97% / 97%
Pants	92% / 89%
Footwear	90% / 89%
Gloves	72% / 85% ▲
Other Gear	59% / 51%

Gear Owned vs. Worn

Helmets	▲99% / 99%
Jackets	80% / 97%
Pants	59% ▼ / 89%
Footwear	73% / 89%
Gloves	82% / 85%
Other Gear	39% / 51%

BARRIERS TO OWNING AND WEARING

Barriers to owning

Top 5

Too expensive	37% / 39%
I'm not sure what else I need	25% / 27%
Don't think I need it	25% / 20%
Haven't got around to buying	19% / 18%
It's not mandatory	13% / 12%

Skews

I didn't think about it / it's not top of mind	13% / 7% ▼
I only ride in quiet areas	15% / 6% ▼
I only ride for short trips	9% / 3% ▼

Barriers to wearing

Top 5

Don't want to change clothes	20% / 30%
It's only necessary for some rides	24% / 26%
I have nowhere to store it at my destination	22% / 26%
I get too hot when I wear it	27% / 25%
I can't wear it over clothes I need at destination	18% / 22%

Skews

I forget / it's not top of mind	10% / 4% ▼

Base: Total sample (912), Trade-off Makers segment (132)
C3B. And which would you say is your greatest concern? D1. Which of the following protective gear do you currently own? D2. And how often do you wear the following items of protective motorcycle clothing? D8A. Prior to today, were you aware of the Learner Approved Motorcycle Scheme (LAMS) that allows novice riders (on L, P1, or P2 licences) to ride only lower and moderately powered motorcycles or scooters? D8B. Prior to today, had you heard of the MOTOCAP safety ratings for motorcycle gear? D8C. Prior to today, had you heard of the CRASH safety ratings for motorcycle helmets? D8D. How useful do you find these safety ratings?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

Considerations relating to how protective gear is designed and storage options may be of increased relevance to this segment.

Experienced Enthusiasts

Love the feeling of the open road – Enthusiasts, Community, Social

In light of the growing number of motorcyclist licence holders in NSW, Transport for NSW sought to better understand this target audience to inform future policy decisions, programs, and communications around motorcyclist safety.

NSW motorcyclists are not a homogenous group. Our research revealed 6 segments of riders, each with the own set of attitudes, behaviours, and beliefs in relation to riding, risk, and safety:

Risky Riders	Trade-off Makers	**Experienced Enthusiasts**	Comfort-zone Riders	Timid Riders	Occupational Riders

This document provides a summary of the key characteristics of the **Experienced Enthusiasts** segment and tips for how to win their hearts and minds to encourage safe riding behaviours.

The segmentation represents NSW riders who have ridden in the last 6 months at the time of research.

SIZE OF SEGMENT

22%

KEY SEGMENT FEATURES

- Riding is a passion, primarily for leisure
- Commonly riding open roads including long trips
- Confident in a variety of riding conditions
- Think they are responsible for their own safety when riding
- Kit up for the ride ("ATGATT")

DESCRIPTION

Experienced Enthusiasts

These are **passionate riders** who are enthusiasts of the hobby. They simply **enjoy the feeling** of riding and like to make an occasion out of riding trips.

Generally older, these riders are by far the **most likely to ride as part of a social riders group,** but will also travel alone. They love **on-road leisure bikes** such as sports/tourers and cruisers and long trips, speaking to their **love for the open road** and soaking up the sights, sounds, and feelings.

The types of trips these riders take mean they are **experienced with different types of roads and conditions**, and have more confidence than other segments riding in the dark, on unfamiliar roads, when it is wet, amongst heavy vehicles, and on poor road surfaces.

Whilst these riders **believe in their riding abilities**, they do not think they know it all. Riding is seen as a skill that can continue to be mastered over time as reflected by their **appetite for advanced riding courses**.

Their passion for the hobby means that they can be **protective of how riders are perceived** and express **concerns about the reputation** riders have among other road users, particularly drivers. They are not elitists, however. This segment **welcome anyone** who wants to be part of the riding community into it and are certainly not ones to tell someone else how to ride.

"It feels like you're flying, and you don't have to be going fast. The sound of exhaust as you accelerate you can feel it. It's very sensual, and it just gives you that feeling of floating, flying. You're just like you're just flying without any effort, and I don't know, it's just a great feeling."

DEMOGRAPHICS

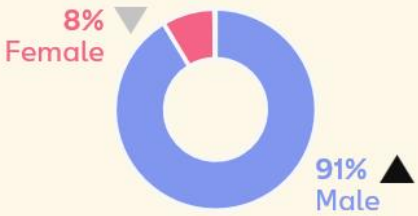
Experienced Enthusiasts are a segment defined by experience and a passion for the open road. These riders, predominantly male, skew middle-aged and older, with 18% of them continuing to embrace the thrill of riding at the age of 55 and beyond.

Unlike other segments, the Experienced Enthusiasts segment has more empty nesters. Their availability to explore means longer trips are more common for this group of riders.

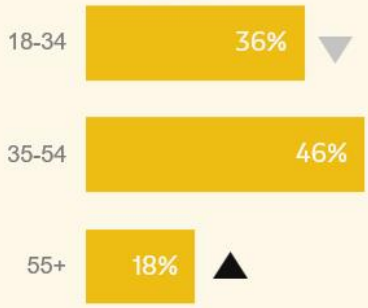
Diversity is a hallmark of this group, with 23% hailing from culturally and linguistically diverse backgrounds.

"Usually, I'm riding with a social group. It could be a small group of three to four people, up to about 20 or 30 people."

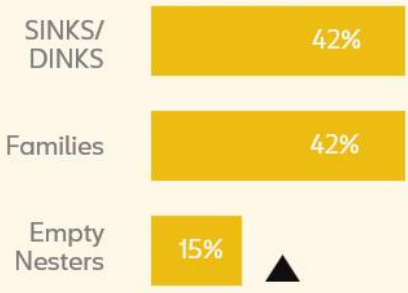
Gender



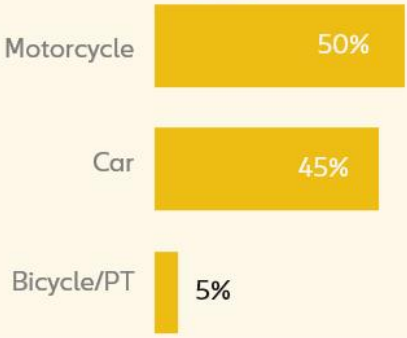
Age



Household



Main mode of transport



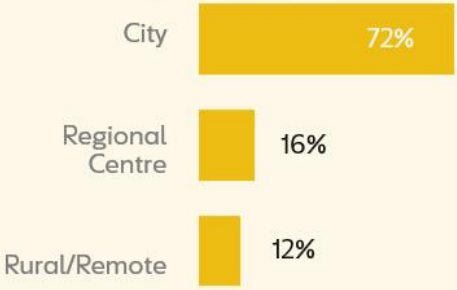
CALD

23% Yes

ATSI

3% Yes ▼

Location



Base: Total sample (912), Experienced Enthusiasts segment (221)
S7. What is your age?; S8. What gender do you identify as?; S10. Which of the following would you say is your main mode of transport?; E2B. Which of the following best describes your household situation?; E1. Do you identify as Aboriginal or Torres Strait Islander?; E2. Do you speak a language other than English at home?; S9A. Which best describes the area that you live in?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

SEGMENT SNAPSHOT

Experienced Enthusiasts are a blend of social and solitary riders. For most though (96%), riding in a group is how they journey and a substantial 44% of them are part of social riders' groups, fostering connections with like-minded individuals who share their passion for the open road. Their journeys take them through a variety of terrains, including state and national parks. Because of this, Experienced Enthusiasts tend to favour an on-road motorcycle with only 10% opting for mopeds or scooters.
Experienced Enthusiasts are seasoned explorers with a significant number of riders having ridden a motorcycle for 11 or more years (42%). Honing their skills, they are confident in a variety of riding conditions.

LICENCE TYPE

87% Full licence

13% Ls/Ps

YEARS EXPERIENCE

14% 0-2 years ▼

21% 3-5 years

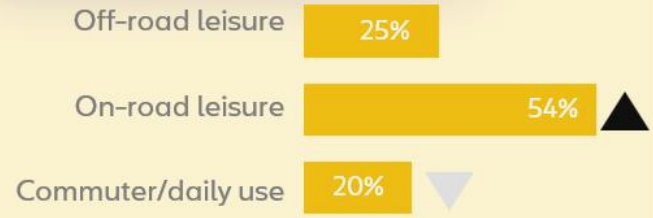
18% 6-10 years

42% 11+ years ▲

RIDING WITH A PASSENGER

Never | Sometimes/Rarely | **Always/Normally**

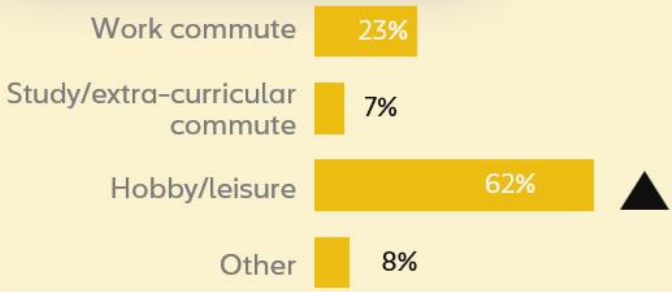
MAIN TYPE OF BIKE*



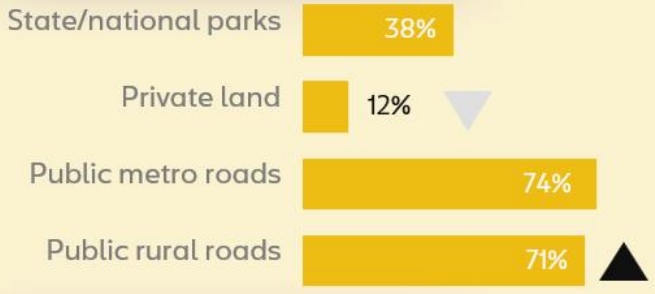
RIDING WITH A GROUP/OTHERS

Never | Sometimes/Rarely | **Always/Normally**

REASON TO RIDE



WHERE THEY RIDE



PERCEIVED SKILL LEVEL (Beginner-Expert)

Beginner – 5 | 6 – 7 | 8 – 9 | **Expert**

Base: Total sample (912), Experienced Enthusiasts segment (221)
A4. Where do you do most of your riding?; A5B. Main reason for riding?; A6. How much of your riding is done with others or in a group?; A7. How much of your riding is done with a passenger?; A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being expert. A2B. And which of the following best describes the type you ride most often?; S4. What is your motorcycle licence? S5. How long have you held a motorcycle licence?
*Off-road leisure: off road bike, trail bike, adventure, motorcross / On-road leisure: sports bike, sports tourer, tourer/cruiser, motor trike / Commuter/daily use: standard road bike, electric, moped, scooter
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

DO IT FOR THE LOVE

For this segment, riding is a pure passion. They love their motorcycle and strongly identify with being a rider - it is in their DNA! They are the most likely segment to pursue riding as a hobby and for their own enjoyment. It is not about getting from A to B as quickly as possible, it is all about the ride. They take their time and are fully attuned to the sensory experience when they ride. Riding meets a number of higher needs for this segment – psychologically it makes them feel powerful, confident and in-control.

LOVE OF RIDING

90% Would be **devastated if they could never ride again** (vs. 79% of all riders)

81% Ride because they **enjoy the feeling of riding** (vs. 72% of all riders)

75% Ride **as a hobby** (vs. 66% of all riders)

This is reflected in their higher levels of confidence across a variety of situations and environments (dark, wet, unfamiliar roads etc). However, their confidence never tips over into arrogance – they are very self aware and know their limitations whilst riding. They aren't the 'know-it-all' type of enthusiast and importantly, they are open to learning more (only 11% agreed that they know everything there is to know about riding).

CONFIDENCE LEVELS

63% Agree they can **avoid an accident when riding** (vs. 58% of all riders)

61% Feel **safe when riding as they are in control** (vs. 56% of all riders)

"I feel I'm a confident rider, but I ride within my limits. I'm aware of the road, like Mount White, I love the old Pacific Highway coming up from Brooklyn towards Pie in the Sky. Yeah, and I give my Shadow, even though it's a cruiser, I give her stick, but I'm still within my limits."

ALL ABOUT COMMUNITY

PART OF THE GROUP

Their passion for riding means that this segment like to be around others who share their passion for riding and their love of motorcycles.
This means that this segment are often part of social rider's groups and associations – this provides an opportunity to chat about their bikes, their riding experiences and also to take long & leisurely group trips across state and national parks.

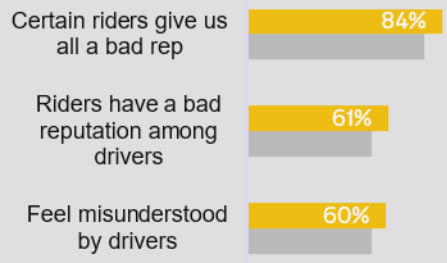
50% Belong to a rider group or association (vs. 45% of all riders)

44% Agree that being part of a social rider's group is a key reason for riding (vs. 27% of all riders)

FEEL MISUNDERSTOOD

Given that being a rider is strongly interlinked with their social identity, this segment are highly sensitive to other road users' attitudes towards them and broader misconceptions about riders. They are the most likely segment to feel misunderstood by drivers and agree that riders have a bed reputation among drivers.

Likely to agree…



*Experienced Enthusiasts in graphs is this segment, grey is all riders

ALL RIDERS AREN'T THE SAME

They hate being tarred with the same brush as those in the Risky Riders segment and try to distance themselves by abiding by rules and displaying more cautious behaviours.

"I was on my 750, and with a cruiser you can't go. I had two sports bikes go past me at a rate of knots going uphill, and they went over double lines and it's a high fatality road. I was just thinking, "No wonder," those idiots give us all a bad name."

Likely to agree they would…

For this segment, riding is a part of their social identity - they take the reputation of riders very seriously and try to model good behaviour to other road users to offset the behaviours of those in the Risky Riders segment. This segment are open to guidance and learning, especially if it leverages a respected voice within the riding community.

SAFETY CONCERNS

Top 3 Greatest Safety Concerns

Inattention of other drivers	28% / 41%
Other road users not seeing motorcyclists	18% / 21%
Poor road surfaces	13% / 15%

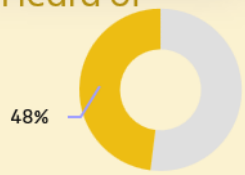
Greatest safety concerns (skews)

Weather conditions	8% / 4% ▼
Other motorcyclists riding unsafely	3% / 1% ▼

SAFETY RATINGS

MOTOCAP

Heard of

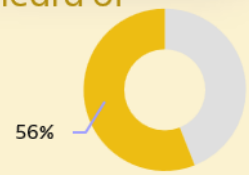


Usefulness

Not applicable	6% / 2% ▼
Not at all useful	4% / 2%
Not very useful	5% / 10%
Somewhat useful	44% / 52%
Very useful	41% / 34%

CRASH

Heard of



Usefulness

Not applicable	5% / 2%
Not at all useful	2% / 2%
Not very useful	6% / 6%
Somewhat useful	44% / 51%
Very useful	43% / 40%

PROTECTIVE GEAR OWNED VS. WORN

Gear Currently Owned

Helmets	98% / 99%
Jackets	97% / 99%
Pants	92% / 96% ▲
Footwear	90% / 93%
Gloves	72% / 87% ▲
Other Gear	59% / 66% ▲

Gear Owned vs. Worn

Helmets	96% / 99%
Jackets	81% / 99%
Pants	73% / 96%
Footwear	77% / 93%
Gloves	83% / 87%
Other Gear	50% / 66%

BARRIERS TO OWNING AND WEARING

Barriers to owning

Top 5

Too expensive	37% / 40%
I'm not sure what else I need	25% / 33% ▲
Don't think I need it	25% / 30%
Haven't got around to…	19% / 20%
It's not mandatory	13% / 10%

Skews

I only ride for short trips	15% / 8% ▼
I rarely ride my bike	8% / 2% ▼

Chart Area

Barriers to wearing

Top 5

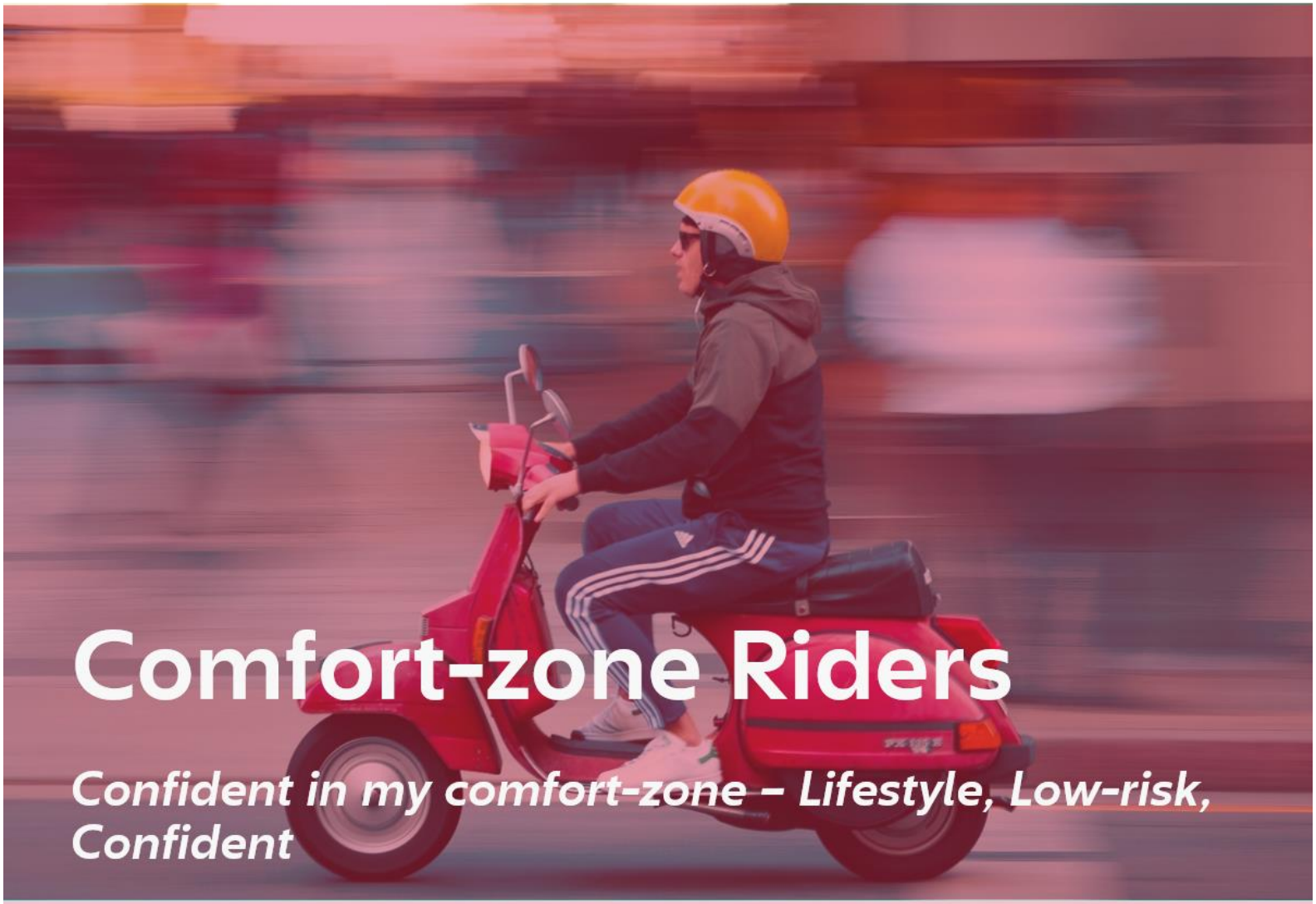
Too expensive	37%
Don't think I need it	26% / 33% ▲
I'm not sure what else I need	25% / 33% ▲
Haven't got around to…	19% / 20%
It's not mandatory	13% / 10%

Skews

I only ride for short trips	15% / 8% ▼
Uncomfortable/ not practical	1% / 4% ▼
I rarely ride my bike	9% / 2% ▼

Base: Total sample (912), Experienced Enthusiasts segment (221)
C3B. And which would you say is your greatest concern? D1. Which of the following protective gear do you currently own? D2. And how often do you wear the following items of protective motorcycle clothing? D8A. Prior to today, were you aware of the Learner Approved Motorcycle Scheme (LAMS) that allows novice riders (on L, P1, or P2 licences) to ride only lower and moderately powered motorcycles or scooters? D8B. Prior to today, had you heard of the MOTOCAP safety ratings for motorcycle gear? D8C. Prior to today, had you heard of the CRASH safety ratings for motorcycle helmets? D8D. How useful do you find these safety ratings?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

There is an opportunity to leverage Experienced Enthusiasts' role in social groups to promote the necessity of safety gear.



Comfort-zone Riders

Confident in my comfort-zone – Lifestyle, Low-risk, Confident

In light of the growing number of motorcyclist licence holders in NSW, Transport for NSW sought to better understand this target audience to inform future policy decisions, programs, and communications around motorcyclist safety.

NSW motorcyclists are not a homogenous group. Our research revealed 6 segments of riders, each with the own set of attitudes, behaviours, and beliefs in relation to riding, risk, and safety:

Risky Riders	Trade-off Makers	Experienced Enthusiasts	**Comfort-zone Riders**	Timid Riders	Occupational Riders

This document provides a summary of the key characteristics of the **Comfort-zone Riders** segment and tips for how to win their hearts and minds to encourage safe riding behaviours.

The segmentation represents NSW riders who have ridden in the last 6 months at the time of research.

SIZE OF SEGMENT

19%

KEY SEGMENT FEATURES

- See riding as a key part of their lifestyle – for commuting and leisure
- Metro riders typically on commuter/ daily use bikes
- Low propensity for risk
- Practice safe riding behaviours and do not push the boundaries

DESCRIPTION

Comfort-zone Riders

Riding is part of these riders' **lifestyle**: they **ride the most frequently** and love it as a way to get around, particularly on public roads in **metro areas**.

These riders feel a **sense of identity** with being a rider and see it as much more than simply a way to get from A to B. Riding gives them the chance to **express a part of themselves** that may be less prominent in their everyday life. The enjoyment of riding and role it plays in their life means they would be devastated if they could no longer ride. They take every opportunity to ride... but this is a choice they make – for many, motorcycles are not their only option for transport.

With a low propensity for risk, these riders **do not push the boundaries** in situations that could increase their chances of a crash (avoiding riding on roads with poor surfaces, weaving in and out of lanes, speeding or overtaking, riding in wet conditions). However, **within their 'riding comfort zone' they are confident riders**, feel in control, and trust their abilities to navigate their environment.

With this confidence, these riders are happy to pull up other riders who are being unsafe on the road (but only within the parameters of their own experience), as their love for the hobby means they **care about how riders are seen** by other road users

"When I see people taking risks or riding in an unsafe way I think, 'You idiot'. It gives riders a bad name."

DEMOGRAPHICS

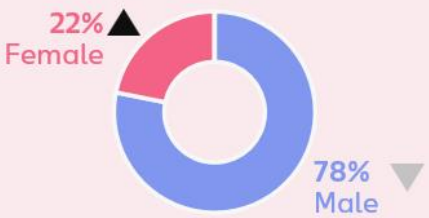
Comfort-zone Riders represent a mix of ages and household types. They are a diverse group with a higher proportion of females (22%) than other segments.

Additionally, 25% of riders come from culturally and linguistically diverse background and 10% of this segment also identify as Aboriginal and Torres Strait Islander.

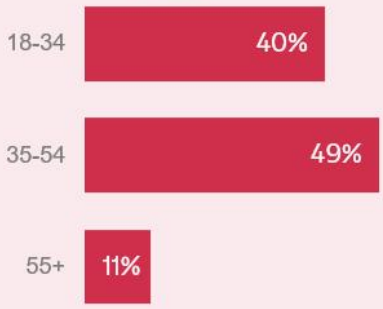
This diverse group is found both in metro and regional areas and many of them rely on commuter bikes, reflecting that motorcycles are not merely a passion but also a practical choice for their daily transport needs.

"I ride every day. If it's raining, I'll drive, but otherwise I'll scoot everywhere. Whether it's to the beach or I do a few hours work at the airport. But if I've got the choice, I'll always ride a scooter."

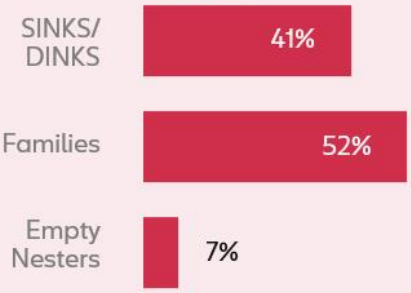
Gender



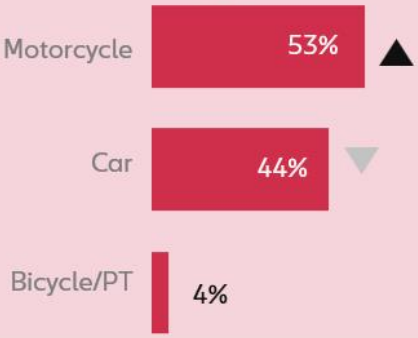
Age



Household



Main mode of transport



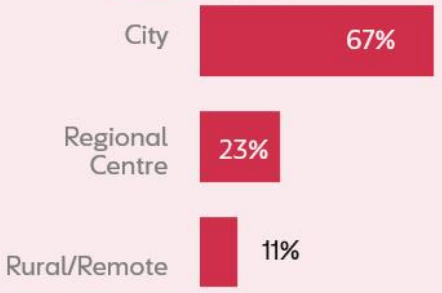
CALD

25% Yes

ATSI

10% Yes

Location



Base: Total sample (912), Comfort-zone Riders segment (190)
S7. What is your age?; S8. What gender do you identify as?; S10. Which of the following would you say is your main mode of transport?; E2B. Which of the following best describes your household situation?; E1. Do you identify as Aboriginal or Torres Strait Islander?; E2. Do you speak a language other than English at home?; S9A. Which best describes the area that you live in?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

SEGMENT SNAPSHOT

For Comfort-zone Riders, motorcycles are more than a mode of transport; they are an integral part of their lifestyle. They embrace the dual role of motorcycles for both daily commuting and leisurely escapes, using their bikes on public metro roads. In contrast to other segments, mopeds and scooters find a strong following here, with 31% of riders choosing these bikes for their commuting. This group is also often found riding with a passenger (78%).

While this group has a varied range of experience, within their riding comfort zone, confidence reigns supreme. These riders feel in control and trust their abilities to navigate their environment.

LICENCE TYPE

85% Full licence

15% Ls/Ps

YEARS EXPERIENCE

19% 0-2 years

20% 3-5 years

25% 6-10 years

33% 11+ years

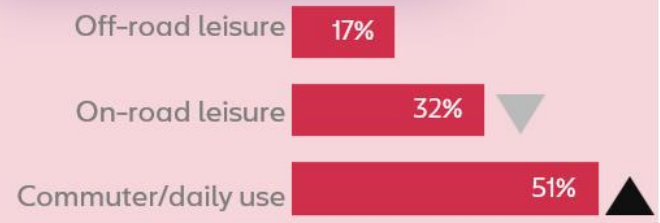
RIDING WITH A PASSENGER

Never | Sometimes/Rarely | Always/Normally

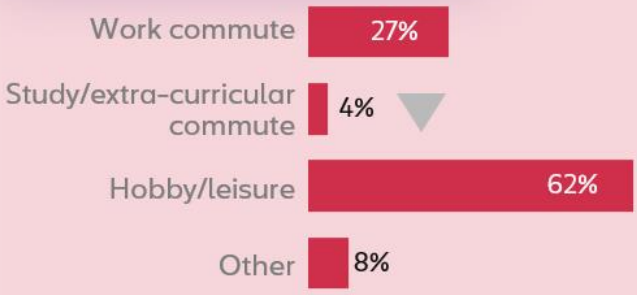
RIDING WITH A GROUP/OTHERS

Never | Sometimes/Rarely | Always/Normally

MAIN TYPE OF BIKE*



REASON TO RIDE



WHERE THEY RIDE

PERCEIVED SKILL LEVEL (Beginner-Expert)

Beginner – 5 | 6 – 7 | 8 – 9 | Expert

Base: Total sample (912), Comfort-zone Riders segment (190)
A4. Where do you do most of your riding?; A5B. Main reason for riding?; A6. How much of your riding is done with others or in a group?; A7. How much of your riding is done with a passenger?; A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being expert. A2B. And which of the following best describes the type you ride most often?; S4. What is your motorcycle licence? S5. How long have you held a motorcycle licence?
*Off-road leisure: off road bike, trail bike, adventure, motorcross / On-road leisure: sports bike, sports tourer, tourer/cruiser, motor trike / Commuter/daily use: standard road bike, electric, moped, scooter
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

RIDING TO THE RULES

For this segment, risk is not a reason to ride – they enjoy riding in spite of the risks! Their low propensity for risk is reflected in their mindset towards riding. They *feel* incredibly vulnerable when they are out on their motorcycle. This mindset is mirrored in their attitudes towards riding under the influence of drink or drugs – it is just something they would *never* even consider doing as riding is already a big enough risk for them.

RISK VS. REWARD

83% Agree that they would be devasted if they could never rider again (vs. 79% of all riders)

74% Agree that they are the **most vulnerable road user** (vs. 72% of all riders)

Being risk averse for this segment manifests as being real sticklers for the rules as a way to feel confident and in control. A clear example of this is their behaviours relating to speed. They always ride to the speed limit, even if they know they won't get caught or on open roads where they can see well ahead.

ATTITUDES TO SPEEDING...

3% Would **ride over the speed limit** if I was sure I wouldn't get caught (vs. 25% of all riders)

17% Would **ride faster than the limit** on the open road where I can see well ahead (vs. 45% of all riders)

They also make sure others stick to the rules too! They are the most likely segment to feel confident pulling up other riders who they feel are being unsafe on the road (52% agree they feel confident, compared to 41% of all riders).

"I'm very safe. I always ride on the left side of the road and then keep a watch ahead. And then when turning, I indication. So, my driving style is pretty safe."

COMFORT ZONE CONFIDENCE

HIGH SKILL

While this segment are risk averse, it is not linked to low perceptions of skill. This segment (along with Risky Riders) are most likely to rate themselves as highly skilled or expert riders.

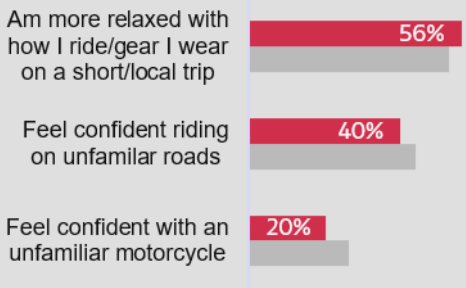
"The more that you ride, the more that you learn, the more that you know what's the best way for you. You find your own style of riding."

67% Rate themselves as **highly skilled – expert riders** (vs. 56% of all riders)

60% **Feel confident** that they can avoid an accident when riding (vs. 58% of all riders)

COMFORT ZONE RIDERS

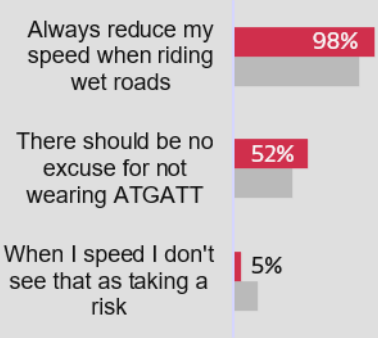
However, this confidence is intrinsically linked with being in their comfort zone. They are the type of rider who sticks with what they know, what feels safe, and what feels familiar – you will see this segment riding the same roads, as they know these roads like the back of their hand... and they like it this way.



*Comfort-zone Riders in graphs is this segment, grey is all riders

OUTSIDE MY ZONE

As soon as this segment step outside of their comfort zone, their confidence dips. The unknown makes them feel uncomfortable, which in turn makes them more cautious riders – riding in their full gear, below the speed limit and according to conditions.



This segment are well versed in the rules around riding and they *love* to stick to them. As such they are the most likely segment to be receptive to additional rules and also act as advocates amongst their peers. They are likely to be easier to onboard, if an initiative appeals to their need to feel more comfortable and protected on the road.

SAFETY CONCERNS

Top 3 Greatest Safety Concerns

Inattention of other drivers	28% / 24%
Aggressive behaviour of drivers	15% / 23% ▲
Other road users not seeing motorcyclists	18% / 14%

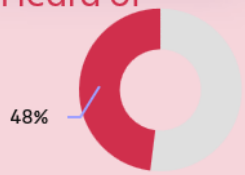
Greatest safety concerns (skews)

Weather conditions	8% / 13% ▲
Poor road surfaces	13% / 7% ▼

SAFETY RATINGS

MOTOCAP

Heard of



Usefulness

Not applicable	6% / 3%
Not at all useful	4% / 2%
Not very useful	5% / 2%
Somewhat useful	44% / 41%
Very useful	41% / 52% ▲

CRASH

Heard of

Usefulness

Not applicable	5% / 2% ▼
Not at all useful	2% / 0% ▼
Not very useful	6% / 1%
Somewhat useful	44% / 44%
Very useful	43% / 52% ▲

PROTECTIVE GEAR OWNED VS. WORN

Gear Currently Owned

Helmets	98% / 100%
Jackets	97% / 99%
Pants	92% / 97% ▲
Footwear	90% / 97% ▲
Gloves	72% / 77%
Other Gear	59% / 55%

Gear Owned vs. Worn

Helmets	96% / 100%
Jackets	91% ▲ / 99%
Pants	85% / 97%
Footwear	87% ▲ / 97%
Gloves	75% / 77%
Other Gear	50% ▲ / 55%

BARRIERS TO OWNING AND WEARING

Top 5 Barriers to owning

Too expensive	37% / 34%
Don't think I need it	25% / 28%
Haven't got around to buying it	19% / 20%
I only ride for short trips	15% / 20%
I'm not sure what else I need	25% / 19%

No skews for Comfort-zone Riders in relation to barriers owning

Top 5 Barriers to wearing

I get too hot when I wear it	27% / 27%
It's uncomfortable / restrictive to wear	21% / 24%
It's only necessary for some rides	24% / 22%
I cannot wear it over the clothes I need to wear at...	18% / 19%
I have nowhere to store it at my destination	22% / 18%

No skews for Comfort-zone Riders in relation to barriers wearing

Base: Total sample (912), Comfort-zone Riders segment (190)
C3B. And which would you say is your greatest concern? D1. Which of the following protective gear do you currently own? D2. And how often do you wear the following items of protective motorcycle clothing? D8A. Prior to today, were you aware of the Learner Approved Motorcycle Scheme (LAMS) that allows novice riders (on L, P1, or P2 licences) to ride only lower and moderately powered motorcycles or scooters? D8B. Prior to today, had you heard of the MOTOCAP safety ratings for motorcycle gear? D8C. Prior to today, had you heard of the CRASH safety ratings for motorcycle helmets? D8D. How useful do you find these safety ratings?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

Comfort-zone Riders both own a lot of gear and wear it often. Focus for this segment should be on maintaining their habits around protective gear.

Timid Riders

Safety first – Functional, Cautious

In light of the growing number of motorcyclist licence holders in NSW, Transport for NSW sought to better understand this target audience to inform future policy decisions, programs, and communications around motorcyclist safety.

NSW motorcyclists are not a homogenous group. Our research revealed 6 segments of riders, each with the own set of attitudes, behaviours, and beliefs in relation to riding, risk, and safety:

Risky Riders	Trade-off Makers	Experienced Enthusiasts	Comfort-zone Riders	**Timid Riders**	Occupational Riders

This document provides a summary of the key characteristics of the **Pink** segment and tips for how to win their hearts and minds to encourage safe riding behaviours.

The segmentation represents NSW riders who have ridden in the last 6 months at the time of research.

SIZE OF SEGMENT

23%

KEY SEGMENT FEATURES

- Riding is more functional – an alternative to driving car
- Conservative riding behaviours
- Low propensity for risk
- Practice safe riding behaviours and do not push the boundaries
- Lower confidence and sense of control

DESCRIPTION

Timid Riders

These riders are **less engaged** with riding compared to other segments, and more likely to be using their bikes for **functional** reasons, such as an **alternative mode of transport** to their car. Riding can also meet a social need for these riders, riding with others on occasion. Whilst they enjoy the ride, being a rider is **not part of their identity** and they are certainly not thinking about riding when they are not doing it!

The way they ride is very by the book, and these riders **do not take chances** that could put themselves at risk. Even though they **make active decisions to minimise their risk** on the road (such as opting to ride only in nice weather, always slowing down in wet conditions, never riding under the influence of alcohol), they still **feel a strong sense of vulnerability** on the road.

Compared to their low risk counterparts (Comfort-zone Riders), these riders are **less confident and feel less in control** on the road. They lack confidence weaving between traffic, riding above the speed limit, riding with passengers, and riding without protective gear. These riders express greater concern and **worry about a greater number of factors** in their riding environment than other segments (including the weather conditions, drivers and other road users, other motorcyclist, road condition, lack of police presence) and it is no surprise that their default is to **ride with caution**.

> "Sometimes I can go for a while without doing it because I just don't have a need for it. Sometimes the car's just simply more convenient. But I do like to do it every now and then as well."

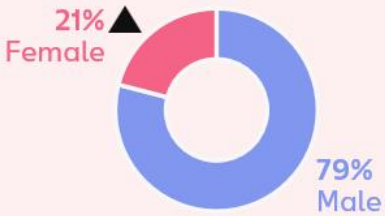
DEMOGRAPHICS

Timid Riders span a range of ages, skewing mid to older and have a greater proportion of empty nesters than other segments. Of all the segments, Timid Riders has the most riders who live in rural and remote areas.

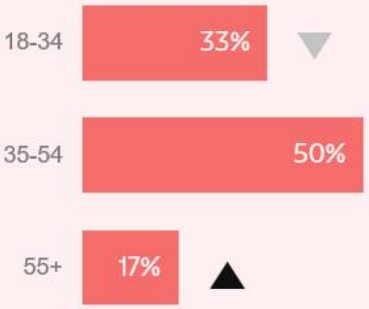
Similar to the Comfort-zone Riders, Timid Riders also have a higher proportion of females (21%), however, their choice of transport leans towards cars serving as their primary mode of transportation for functional reasons.

"I don't ride around town. Normally I leave and get out to an open road somewhere where it's quieter and less risk."

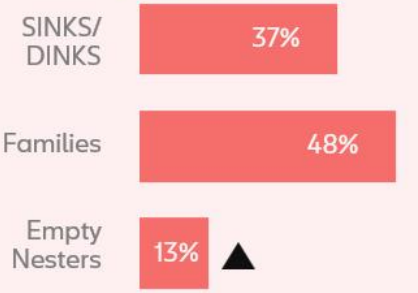
Gender



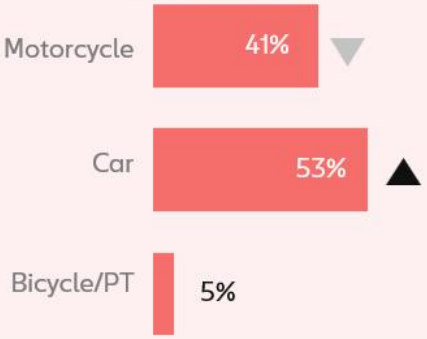
Age



Household



Main mode of transport



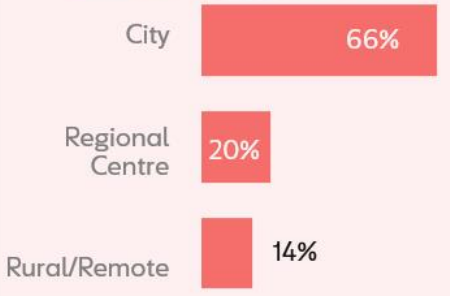
CALD

18% Yes

ATSI

7% Yes

Location



Base: Total sample (912), Timid Riders segment (244)
S7. What is your age?; S8. What gender do you identify as?; S10. Which of the following would you say is your main mode of transport?; E2B. Which of the following best describes your household situation?; E1. Do you identify as Aboriginal or Torres Strait Islander?; E2. Do you speak a language other than English at home?; S9A. Which best describes the area that you live in?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

SEGMENT SNAPSHOT

While Timid Riders may not rely on motorcycles for daily commuting, they are passionate about the open road for leisure.

They predominantly ride solo as they prefer to immerse themselves in the experience without distractions. Off-road leisure bikes hold less appeal for the Timid Riders, with only 14% of riders opting for these bikes. Instead, they are drawn to more practical bikes which fulfil the functional reason they ride.

Despite having a greater number of riders having 11 or more years' experience, Timid Riders lack confidence in their abilities and have a lower sense of control when riding.

LICENCE TYPE

86% Full licence

14% Ls/Ps

YEARS EXPERIENCE

19% 0-2 years

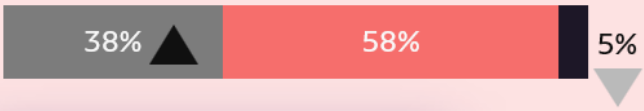
22% 3-5 years

20% 6-10 years

37% 11+ years ▲

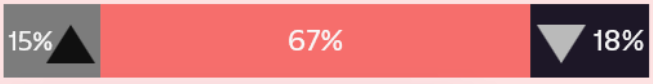
RIDING WITH A PASSENGER

Never | Sometimes/Rarely | Always/Normally

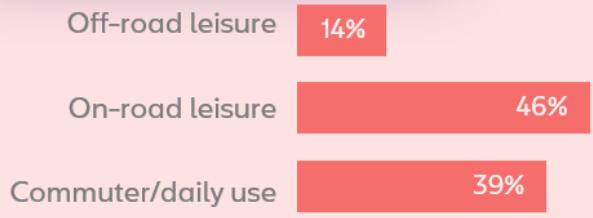


RIDING WITH A GROUP/OTHERS

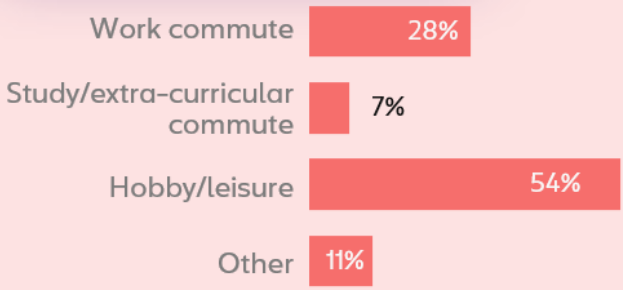
Never | Sometimes/Rarely | Always/Normally



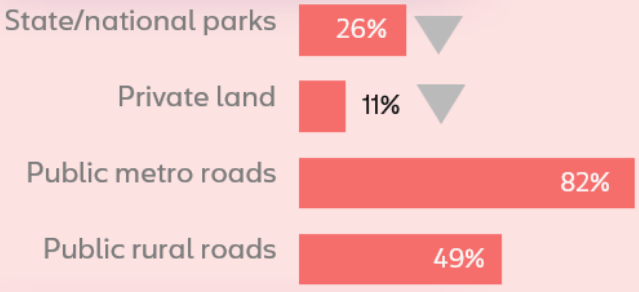
MAIN TYPE OF BIKE*



REASON TO RIDE



WHERE THEY RIDE



PERCEIVED SKILL LEVEL (Beginner-Expert)

Beginner – 5 | 6 – 7 | 8 – 9 | Expert

Base: Total sample (912), Timid Riders segment (244)
A4. Where do you do most of your riding?; A5B. Main reason for riding?; A6. How much of your riding is done with others or in a group?; A7. How much of your riding is done with a passenger?; A8. Please rate your skill level as a rider on a scale of 1-10, with 1 being a beginner, and 10 being expert. A2B. And which of the following best describes the type you ride most often?; S4. What is your motorcycle licence? S5. How long have you held a motorcycle licence?
*Off-road leisure: off road bike, trail bike, adventure, motorcross / On-road leisure: sports bike, sports tourer, tourer/cruiser, motor trike / Commuter/daily use: standard road bike, electric, moped, scooter
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

RIDING IS A PRAGMATIC CHOICE

If there was one segment for whom riding fulfilled the most functional needs – it would be the Timid Riders segment. Whilst they still love riding and the feeling it brings; they are also more pragmatic and concerned about the risks associated with riding. They ride because it is convenient – they get from A to B quicker, without having to wait in queues, and there is free parking at their end destination.

LIKELY TO AGREE...

76% Would be devastated if I could never ride again (compared to 79% of all riders)

31% Commuting to/from work or study, or as part of paid employment is the main reason they ride (compared to 30% of all riders)

15% As a hobby is the main reason they ride (compared to 18% of all riders)

Their concern with risk manifests in a lack of confidence when riding, they are the least likely segment to feel confident in a number of different situations and environments. They are also the most likely segment to agree that they are always the most vulnerable road user (81% agreed, compared to 72% of all riders).

CONFIDENCE IN RIDING

45% Feel confident **riding in the dark** (vs. 54% of all riders)

18% Feel **confident riding on poor road surfaces** (vs. 33% of all riders)

"If it starts raining, I just stop and park on the road or at a petrol station for it to stop because it's very dangerous and I don't like to rusty up the bike."

FAIR WEATHER RIDERS

'GOLDILOCKS' RIDER

The Timid Riders segment are metaphorically (and literally) fair weather riders. Due to their low confidence, they will only ride when the conditions are "just right" (a goldilocks rider!) – avoiding poor road surfaces and only riding in nice weather. They will often default to using their car if the conditions are not quite right for them to feel confident and comfortable riding.

71% I **avoid roads with poor surfaces** such as cracks, potholes or loose gravel (vs 60%)

52% Agree that I **only ride in nice weather** (vs. 40% of all riders)

CONSERVATIVE RIDING

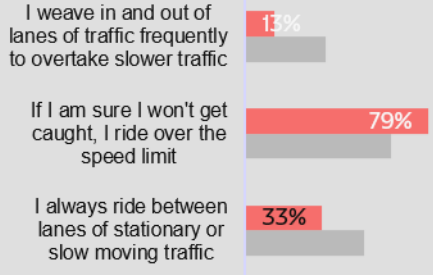
Their low levels of confidence combined with their risk averse nature also leads to this segment being very conservative riders when they do get on their bike – this segment ride to the speed limit, and you are unlikely to see this segment weaving between traffic or lane filtering.

NO CHANCES TAKEN

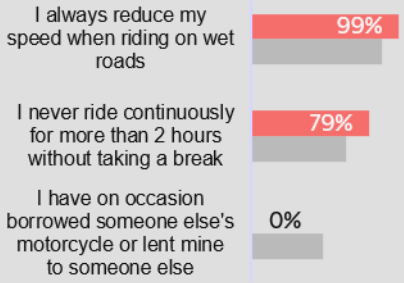
As expected, this segment do not take any chances when they are riding – they take regular breaks, reduce their speed when riding on wet roads, and would never *ever* ride someone else's bike or let someone else ride theirs.

"My riding style has changed. I'm much more careful now. I don't take risks. I don't accelerate fast, which I used to do when I was young."

Less likely to agree...



Likely to agree...



*Timid Riders in graphs is this segment, grey is all riders

This segment are low on confidence and highly risk averse. Communications with this segment would benefit from a warm, caring and educative tone. Offering opportunities to build their confidence, through riding training, would help to encourage them to ride with less hesitance.

SAFETY CONCERNS

Top 3 Greatest Safety Concerns

Inattention of other drivers	28% / 26%
Poor road surfaces	13% / 14%
Aggressive behaviour of drivers of other vehicles	15% / 11%

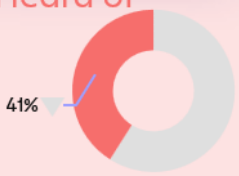
Greatest safety concerns (skews)

No skews for Timid Riders in relation to safety concerns

SAFETY RATINGS

MOTOCAP

Heard of



Usefulness

Not applicable	6% / 0%
Not at all useful	4% / 1%
Not very useful	5% / 0%
Somewhat useful	44% / 44%
Very useful	41% / 55% ▲

CRASH

Heard of

Usefulness

Not applicable	5% / 2%
Not at all useful	2% / 0%
Not very useful	6% / 5%
Somewhat useful	44% / 39%
Very useful	43% / 54% ▲

PROTECTIVE GEAR OWNED VS. WORN

Gear Currently Owned

Helmets	98% / 100%
Jackets	97% / 99%
Pants	92% / 90%
Footwear	90% / 95% ▲
Gloves	72% / 80% ▲
Other Gear	59% / 51%

Gear Owned vs. Worn

Helmets	98% / 100%
Jackets	▲89% / 99%
Pants	▲ 79% / 90%
Footwear	83% / 95%
Gloves	74% / 80%
Other Gear	41% / 51%

BARRIERS TO OWNING AND WEARING

Barriers to owning

Top 5

Too expensive	37% / 39%
Don't think I need it	25% / 20%
I only ride for short trips	15% / 17%
It's not mandatory	13% / 15%
Haven't got around to buying it	19% / 14%

No skews for Timid Riders in relation to barriers owning

Barriers to wearing

Top 5

I get too hot when I wear it	27% / 28%
It's only necessary for some rides	24% / 20%
I have nowhere to store it at my destination	22% / 19%
It's uncomfortable	21% / 19%
Takes too long to put on for the types of rides I do	18% / 18%

No skews for Timid Riders in relation to barriers wearing

Base: Total sample (912), Timid Riders segment (244)
C3B. And which would you say is your greatest concern? D1. Which of the following protective gear do you currently own? D2. And how often do you wear the following items of protective motorcycle clothing? D8A. Prior to today, were you aware of the Learner Approved Motorcycle Scheme (LAMS) that allows novice riders (on L, P1, or P2 licences) to ride only lower and moderately powered motorcycles or scooters? D8B. Prior to today, had you heard of the MOTOCAP safety ratings for motorcycle gear? D8C. Prior to today, had you heard of the CRASH safety ratings for motorcycle helmets? D8D. How useful do you find these safety ratings?
Significantly ▲ higher / ▼ lower than total sample (95% confidence)

Similar to Comfort-zone Riders, Timid Riders' ownership and usage of protective gear is strong. There is an opportunity to reinforce their behaviour through positive reinforcement strategies.

Occupational Riders

Get the job done – Employment, Necessity, Reacting

In light of the growing number of motorcyclist licence holders in NSW, Transport for NSW sought to better understand this target audience to inform future policy decisions, programs, and communications around motorcyclist safety.

NSW motorcyclists are not a homogenous group. Our research revealed 6 segments of riders, each with the own set of attitudes, behaviours, and beliefs in relation to riding, risk, and safety:

Risky Riders	Trade-off Makers	Experienced Enthusiasts	Comfort-zone Riders	Timid Riders	**Occupational Riders**

This document provides a summary of the key characteristics of the Black segment. This typology has been informed by qualitative insights as the incidence of these riders was small across the research (partly as a result of language barriers to participate) and therefore they were not represented in the quantitative component of the main segmentation

The segmentation represents NSW riders who have ridden in the last 6 months at the time of research.

KEY SEGMENT FEATURES

- Motorcycle is used for employment and is often their main mode of transport for other travel
- Seeing riding as relatively functional – it is to get them from A to B
- Relatively low interest in riding as a hobby and have less of a desire than other segments to elevate their riding skills
- Relaxed attitudes towards wearing protective gear all the time – think it is over the top
- Confident riding on unfamiliar roads, in poor visibility, or while fatigued
- Experienced with crashes and related injuries

DESCRIPTION

Occupational Riders

For these riders, riding is **part of their paid employment**, typically in the food or parcel delivery industries. However, it is common for these riders to **use their bikes for other purposes as well** - often as their main mode of transport for general commuting and getting around.

Many **claim that they take safety seriously** when riding, however **risky behaviours are evident** and not uncommon. Whilst well intentioned to ride safely, these riders are **riding with a purpose** (to make the delivery/ pick up on a schedule) and their **riding behaviours tend to be reactive to their situation** (for example, weaving in and out of vehicles when roads are congested, lane filtering, riding in the bicycle lane to get ahead, taking U-turns on the road to change direction).

These riders **believe themselves to be skilled**, and exhibit a higher degree of confidence than other riders **riding in the dark, on unfamiliar roads, in poor visibility, when fatigued, and on a motorcycle that has not been regularly maintained.**

Crashes are not unfamiliar to these riders, particularly experiences of road rash and bruises. **Close calls are prevalent** among this group, however these riders are more likely to brush off a slide as nothing to report and as such have a tendency to understate the number of incidents they have had.

> "I'm just trying to get the job done. It's a bit hectic on the road, especially early evening. I get cut off all the time and yeah, I've had a lot of close calls.