Contemporary Attitudes Toward Motorcycle Riding Safety and Riding Risk Factors – Part 1

International Motorcycle Safety Conference

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Executive Vice President
Irwin Broh & Associates
Irwin Broh & Associates
Capabilities and Experience

➢ Full-service marketing research company in business since 1971

➢ Custom and syndicated studies:
  ✓ Quantitative (mail, phone, web, household panels)
  ✓ Qualitative (focus groups, personal interviews)
  ✓ Industry and competitive profiles

➢ Powersports specialty
  ✓ Motorcycles/Scooters
  ✓ ATVs
  ✓ Boats, marine engines, PWC
  ✓ Snowmobiles
  ✓ PG&A

➢ One million powersports CSI contacts per year

➢ Several studies for MIC/MSF, including past two Owner Surveys
2003
MOTORCYCLE/ATV OWNER SURVEY SUMMARY REPORT

Conducted for the Motorcycle Industry Council
by Irwin Broh & Associates
National probability sample of residential phone numbers

RDD (Random Digit Dialing) phone study

Conducted over a 12-month period

Target completed interviews
  ✓ 2,000 with owning households
  ✓ 2,000 with non-owning households

Screener to confirm ownership and calculate ownership incidence

25 minute / 68 question phone questionnaire for primary rider in owning households

Over 550,000 total dialings
Problems with Telephone Studies

- Do Not Call list
- Caller ID / Answering machine screening
- Proliferation of cell phones (Not available for survey sampling)
- Typical calling window: 6 – 9 pm
- Under-representation of some social segments
- Not suited for longer, more complex surveys
Panel Study Alternatives

- Web panels

- Household panels
  - Balanced by age, income, ethnicity, census track, etc.
  - Statistical microcosm of U.S. population
  - Results projectable to entire U.S. population
About the NFO Panel
(National Family Opinion)

- World’s largest consumer panel
  - Almost one million member households in the U.S.
- Established in 1946
- Panel membership is free and voluntary
- Results obtained are representative of all U.S. households
Motorcycles, Scooters, & All-Terrain Vehicles
3a. Does anyone in your household own a motorcycle, mini-cycle, or scooter (defined as a motorized vehicle you have to sit on to ride. This does not include a moped or anything with pedals, and does not include a Razor or stand-up scooter)
   □ Yes (Continue)   □ No (SKIP TO 4a)
3b. How many motorcycles, mini-cycles, or scooters are currently owned in your household? #
3c. And how many of these motorcycles, mini-cycles, or scooters are currently in running order? #
3d. Fill in the following for the newest of each owned:
<table>
<thead>
<tr>
<th>Brand</th>
<th>Model Yr</th>
<th>Engine size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motorcycle</td>
<td></td>
<td>cc</td>
</tr>
<tr>
<td>Mini-cycle</td>
<td></td>
<td>cc</td>
</tr>
<tr>
<td>Scooter</td>
<td></td>
<td>cc</td>
</tr>
</tbody>
</table>
4a. Does anyone in your household own a 3 or 4-wheel All-Terrain Vehicle, that is an ATV with handlebars meant for off-highway riding that you straddle to ride. (This does not include dune buggies or an SUV like a Jeep or Ford Explorer)
   □ Yes (Continue)   □ No (SKIP TO 5a)
4b. How many ATVs are currently owned in your household? #
4c. And how many of these ATVs are currently in running order? #
4d. Fill in for the newest ATV owned:
   Brand: _________  Model Yr: __
   Engine size: ____cc
5a. Does anyone in your household own a boat?
   □ Yes (Continue)   □ No (SKIP TO 6a)
5b. Fill in the following for the newest boat owned:
   Brand: ___________  Length: ____ft  Model Yr: ____
   Engine type:
   □ Outboard motor  □ Inboard engine  □ Stern drive engine  □ No engine (sailboat)
   Total Engine horsepower: ____hp
6a. Does anyone in your household own a personal watercraft (PWC), like a Jet Ski?
   □ Yes (Continue)   □ No (SKIP TO 7a)
6b. Fill in the following for the newest PWC owned:
   Brand: ___________  Model Yr: ____  # of passenger: __
7a. Does anyone in your household own a snowmobile?
   □ Yes (Continue)   □ No (SKIP TO 8a)
7b. Fill in the following for the newest snowmobile owned:
   Brand: ___________  Model Yr: ____  Engine size: __ cc
8a. Does anyone in your household own a RV?
   □ Yes (Continue)   □ No (Return survey)
8b. Fill in the following for the newest RV owned:
   Brand: ___________  Model Yr: __
   Type: □ Motorized RV □ Towable RV

TO BE ANSWERED BY THE HOUSEHOLD MEMBER THAT RIDES MOTORCYCLES THE MOST, OR IS MOST FAMILIAR WITH MOTORCYCLE RIDING.

Motorcycle Ownership
1a. How many motorcycles or scooters are currently owned by you or other members of your household? (X ONE Box)
   1 □ 2 □ 3 □ 4 □ 4 or more □ None (12)
1b. And how many of these motorcycles are currently in running order? (X ONE Box)
   1 □ 2 □ 3 □ 4 □ 4 or more □ None (13)
2. How many motorcycles or scooters have you (personally) ever owned?
   1 □ 2 □ 3 □ 4 □ 5 □ 6 □ 7 □ 8 □ 9 □ 10 or more (14)
3. Besides yourself, how many other motorcycle riders are there in your family? (X ONE Box)
   □ None, I am the only motorcycle rider
   2 □ There are other male riders and other female riders in my family. (15)(16)(17)(18)(19)
4. Which category below best describes the type of motorcycle you ride most often? (X ONE Box)
   □ Scooter  □ Touring  □ Competition/Motocross (20)
   □ Standard/Traditional  □ Sport bike  □ Dual purpose (21)
   □ Cruiser  □ Off-road/Enduro  □ Other: ___________________________
Study Objectives

1. Test panel methodology as possible alternative for 2008 Motorcycle/ATV Owners Study

2. Utilize byproduct (motorcycle owning households) for follow-up Riding Safety Study

Advantages:
✓ National probability sample of motorcycle owning households
✓ Representative of U.S. population
✓ Results statistically projectable
✓ Respondents answer anonymously
Numbers for this Study

50,000 screener cards sent out

28,299 screener cards returned → 56.6% response rate

1,875 households owning a motorcycle/mini-cycle/scooter identified → 6.6% ownership incidence

1,751 follow-up surveys sent out

1,203 follow-up surveys returned → 68.7% response rate
Questionnaire Topics

1. Current and prior motorcycle ownership history
   - Number
   - Brand
   - Type
   - Size
   - Model

2. Number of motorcycle riders in family

3. Riding experience, history, frequency

4. Motorcycle training/safety course attendance

5. Course evaluation
6. Riding risk factors
   ✓ Threat perception
   ✓ Participation in risky riding

7. Accident and crash history

8. Ownership/Use of protective riding gear

9. Drinking and driving
   ✓ Attitudes
   ✓ Past behavior (car and motorcycle)

10. Attitudes/Membership in motorcycle-related clubs

11. Involvement in motorcycle-related issues

12. Demographics
Respondent Analysis Groups

- Respondents distributed by:
  - Type of motorcycle owned
  - Motorcycle riding experience
  - Gender
  - Age
  - Education
  - Household income
  - Prior accident experience (their own and others)
Respondent Analysis Groups
U.S. Region

Base: All Respondents (1,203)
Respondent Analysis Groups
Gender

Base: All Respondents (1,203)
Respondent Analysis Groups

Age

Mean age: 47.4 years old

Base: All Respondents (1,203)
Respondent Analysis Groups
Household Income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $30,000</td>
<td>19.1%</td>
</tr>
<tr>
<td>$30,000 - $44,999</td>
<td>14.4%</td>
</tr>
<tr>
<td>$45,000 - $59,999</td>
<td>13.8%</td>
</tr>
<tr>
<td>$60,000 - $74,999</td>
<td>12.0%</td>
</tr>
<tr>
<td>$75,000 - $99,999</td>
<td>19.2%</td>
</tr>
<tr>
<td>$100,000 and Over</td>
<td>21.5%</td>
</tr>
</tbody>
</table>

Mean: $73,761
Median: $63,385

Base: All Respondents (1,203)
Respondent Analysis Groups
Education

- Grade 8 or Less: 1.6%
- Some High School: 5.1%
- High School Graduate: 21.6%
- Technical School: 10.2%
- Some College: 25.5%
- College Graduate: 23.8%
- Post-Graduate Work: 3.1%
- Graduate Degree: 9.1%

Mean # of years: 14.2

Base: All Respondents (1,203)
Respondent Analysis Groups
Motorcycle Type*

- Cruiser: 32.6%
- Traditional: 18.8%
- Touring: 17.2%
- Scooter: 9.8%
- Sport Bike: 9.0%
- Off-Road/Enduro: 6.9%
- Competition/Motocross: 2.5%
- Dual Purpose: 1.6%
- Other: 1.6%

Base: All Respondents (1,203)  *Self-reported
Respondent Analysis Groups
Motorcycle Riding Experience

- **Beginnings/New Rider**: 6.3%
- **Some Experience**: 15.8%
- **Experienced**: 39.9%
- **Very Experienced**: 36.2%
- **Professional/Semi-Pro/Motorcycle Racer**: 1.7%

Base: All Respondents (1,203)
Rider Definition

- Enthusiast (Continuous) Rider: 48.9%
- Beginning Rider: 15.1%
- Returning Rider: 36.0%

**Base: All Respondents (1,203)**

**Years Ridden Before Stopping:**
- 1 yr or less: 2.9%
- 2 - 3 yrs: 18.2%
- 4 - 5 yrs: 17.5%
- 6 - 10 yrs: 29.1%
- 11 - 15 yrs: 13.8%
- 16 - 20 yrs: 12.1%
- More than 20 yrs: 6.3%

  - **Mean (yrs):** 10.0
  - **Median (yrs):** 10.0

**Years Did Not Ride at All:**
- 1 yr or less: 2.7%
- 2 - 3 yrs: 10.1%
- 4 - 5 yrs: 14.7%
- 6 - 10 yrs: 25.8%
- 11 - 15 yrs: 18.1%
- 16 - 20 yrs: 14.0%
- More than 20 yrs: 14.5%

  - **Mean (yrs):** 12.7
  - **Median (yrs):** 10.0

**Took a Motorcycle Training or Safety Course Before Riding Again:**
- Yes: 21.4%
- No: 78.6%

**Why Started Riding Again:**
- Missed it/Enjoy it: 41.5%
- Purchased/Given/Rebuilt a bike: 19.5%
- Friend/Relative started riding: 15.9%
- Have more time/Kids grown: 14.6%
- Fuel prices/More economical: 14.4%
- Financially able: 6.4%
- Alternative transportation: 4.1%
- Other: 2.8%

*Exceeds 100% due to multiple mentions*

**Table Bases:** Returning Riders (424)
Motorcycle Riding Risk Factors

- Poor road conditions (gravel, potholes, construction, etc.)
- Bad weather (rain, snow, fog, etc.)
- Excess speed (riding over the speed limit)
- Light/Moderate alcohol consumption (by you)
- Heavy alcohol consumption (by you)
- Condition/Safety of your bike (tires, brakes, etc.)
- Stunts/”Extreme” riding (popping wheelies, etc.)
- Heavy traffic
- Lane splitting (driving up the middle of two lanes of traffic)
- Riding in groups (with several other motorcycle riders)
Motorcycle Riding Risk Factors

- Stunts/Extreme Riding
- Heavy Alcohol Consumption
- Light/Moderate Alcohol Consumption
- Lane Splitting
- Condition/Safety of your Bike
- Bad Weather
- Excess Speed
- Poor Road Conditions
- Light/Moderate Alcohol Consumption
- Heavy Alcohol Consumption
- Riding in Groups
- Lane Splitting

Mean Ratings

Frequency of Riding in this Manner

Threat to Safety Scale: 1=Low Threat to Safety … 10= High Threat to Safety
Frequency of Riding Scale: 1=Never, 2=Seldom, 3=Occasionally, 4=Frequently, 5=Always

Base: All Respondents (1,203)
## Motorcycle Riding Risk Factors
### Mean Frequency Ratings

<table>
<thead>
<tr>
<th>Risk Factor</th>
<th>Grand Total</th>
<th>Scooter</th>
<th>Traditional</th>
<th>Cruiser</th>
<th>Touring</th>
<th>Sport Bike</th>
<th>Off-road/Enduro/Motocross</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heavy traffic</td>
<td>2.69</td>
<td>2.24</td>
<td>2.70</td>
<td>2.90</td>
<td>3.07</td>
<td>2.93</td>
<td>1.56</td>
</tr>
<tr>
<td>Poor road conditions</td>
<td>2.53</td>
<td>2.26</td>
<td>2.53</td>
<td>2.58</td>
<td>2.51</td>
<td>2.53</td>
<td>2.58</td>
</tr>
<tr>
<td>Riding in groups</td>
<td>2.51</td>
<td>1.72</td>
<td>2.20</td>
<td>2.88</td>
<td>2.88</td>
<td>2.54</td>
<td>2.13</td>
</tr>
<tr>
<td>Excess speed</td>
<td>2.07</td>
<td>1.55</td>
<td>1.94</td>
<td>2.10</td>
<td>2.29</td>
<td>2.53</td>
<td>1.97</td>
</tr>
<tr>
<td>Bad weather</td>
<td>2.04</td>
<td>1.70</td>
<td>1.96</td>
<td>2.10</td>
<td>2.21</td>
<td>2.05</td>
<td>2.02</td>
</tr>
<tr>
<td>Condition/Safety of your bike</td>
<td>1.69</td>
<td>1.76</td>
<td>1.75</td>
<td>1.66</td>
<td>1.63</td>
<td>1.83</td>
<td>1.57</td>
</tr>
<tr>
<td>Lane splitting</td>
<td>1.42</td>
<td>1.33</td>
<td>1.39</td>
<td>1.43</td>
<td>1.46</td>
<td>1.69</td>
<td>1.13</td>
</tr>
<tr>
<td>Light/Moderate alcohol consumption</td>
<td>1.39</td>
<td>1.31</td>
<td>1.36</td>
<td>1.48</td>
<td>1.47</td>
<td>1.34</td>
<td>1.20</td>
</tr>
<tr>
<td>Stunts/Extreme riding</td>
<td>1.26</td>
<td>1.15</td>
<td>1.18</td>
<td>1.16</td>
<td>1.08</td>
<td>1.45</td>
<td>2.10</td>
</tr>
<tr>
<td>Heavy alcohol consumption</td>
<td>1.09</td>
<td>1.14</td>
<td>1.12</td>
<td>1.11</td>
<td>1.07</td>
<td>1.07</td>
<td>1.02</td>
</tr>
</tbody>
</table>

Base: All Respondents (1,203)

Scale: 1=Never, 2=Seldom, 3=Occasionally, 4=Frequently, 5=Always