

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

## **International Motorcycle Safety Conference**

March 28, 2006

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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



September 2004

# 2003 MOTORCYCLE/ATV OWNER SURVEY SUMMARY REPORT

Conducted for the Motorcycle Industry Council  
by Irwin Broh & Associates

# 2003 Motorcycle/ATV Owner Study

## Study Methodology

- 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

# Screener Card and Follow-up Survey

## 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:

	Brand	Model Yr	Engine size	cc
Motorcycle	_____	_____	_____	_____
Mini-cycle	_____	_____	_____	_____
Scooter	_____	_____	_____	_____

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  Outboard motor     Inboard engine  
type:  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



P.O. Box 474 Toledo, OH 43654  
Toll-Free Number: 1-800-537-4097  
Mon – Fri, 8:00 AM to 11:00 PM EST  
Sat & Sun, 10:00 AM to 6:00 PM EST  
Contact Us: <http://mysurvey.com/contactus.cfm>  
Privacy: <http://mysurvey.com/privacy.cfm>

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

### Motorcycle Ownership

- How many motorcycles or scooters are **currently owned** by you or other members of your household? (X ONE Box)
 

1 <input type="checkbox"/> 1	2 <input type="checkbox"/> 2	3 <input type="checkbox"/> 3	4 <input type="checkbox"/> 4 or more	5 <input type="checkbox"/> None	(12)
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- And how many of these vehicles are **currently in running order**? (X ONE Box)
 

1 <input type="checkbox"/> 1	2 <input type="checkbox"/> 2	3 <input type="checkbox"/> 3	4 <input type="checkbox"/> 4 or more	5 <input type="checkbox"/> None	(13)
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- How many motorcycles or scooters have you (personally) **ever owned**?
 

1 <input type="checkbox"/> 1	3 <input type="checkbox"/> 3	5 <input type="checkbox"/> 5	7 <input type="checkbox"/> 7	9 <input type="checkbox"/> 9	(14)
2 <input type="checkbox"/> 2	4 <input type="checkbox"/> 4	6 <input type="checkbox"/> 6	8 <input type="checkbox"/> 8	0 <input type="checkbox"/> 10 or more	
- Besides yourself, how many other motorcycle riders are there in your family? (X ONE Box)
 

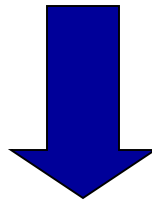
1 <input type="checkbox"/> None, I am the only motorcycle rider	
2 <input type="checkbox"/> There are _____ other male riders and _____ other female riders in my family.	(16:17) (18:19)
	(Write In #) (Write In #)
- Which category below best describes the type of motorcycle you ride most often? (X ONE Box)
 

1 <input type="checkbox"/> Scooter	4 <input type="checkbox"/> Touring	7 <input type="checkbox"/> Competition/Motocross	(20)
2 <input type="checkbox"/> Standard/Traditional	5 <input type="checkbox"/> Sport bike	8 <input type="checkbox"/> Dual purpose	
3 <input type="checkbox"/> Cruiser	6 <input type="checkbox"/> Off-road/Enduro	9 <input type="checkbox"/> Other: _____	(21)



# Study Objectives

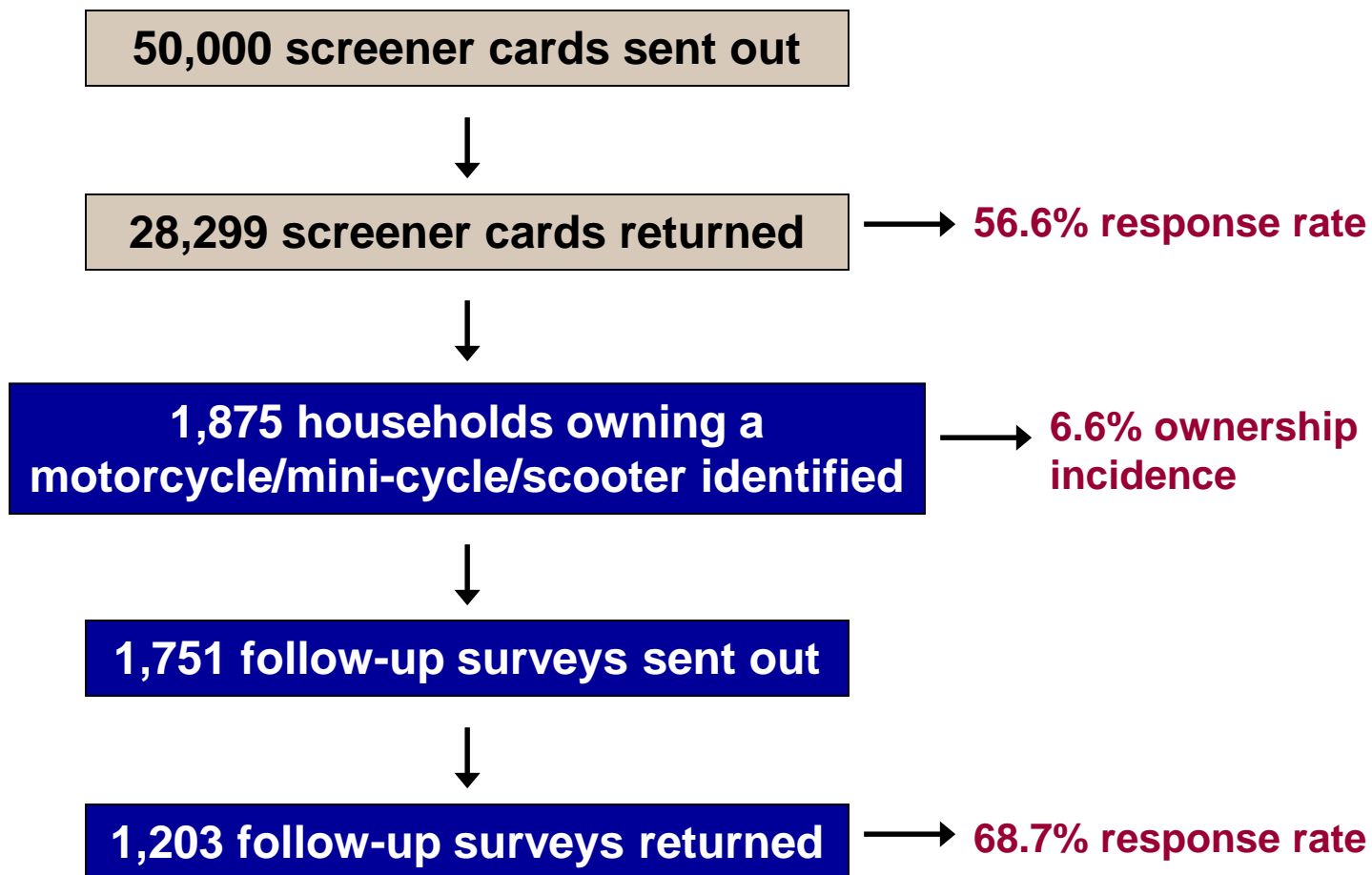
1. Test panel methodology as possible alternative for 2008 Motorcycle/ATV Owners Study
2. Utilize byproduct (motorcycle owning households) for follow-up Riding Safety Study



## Advantages:

- ✓ National probability sample of motorcycle owning households
- ✓ Representative of U.S. population
- ✓ Results statistically projectable
- ✓ Respondents answer anonymously

# Numbers for this Study



# 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

## Questionnaire Topics (cont'd)

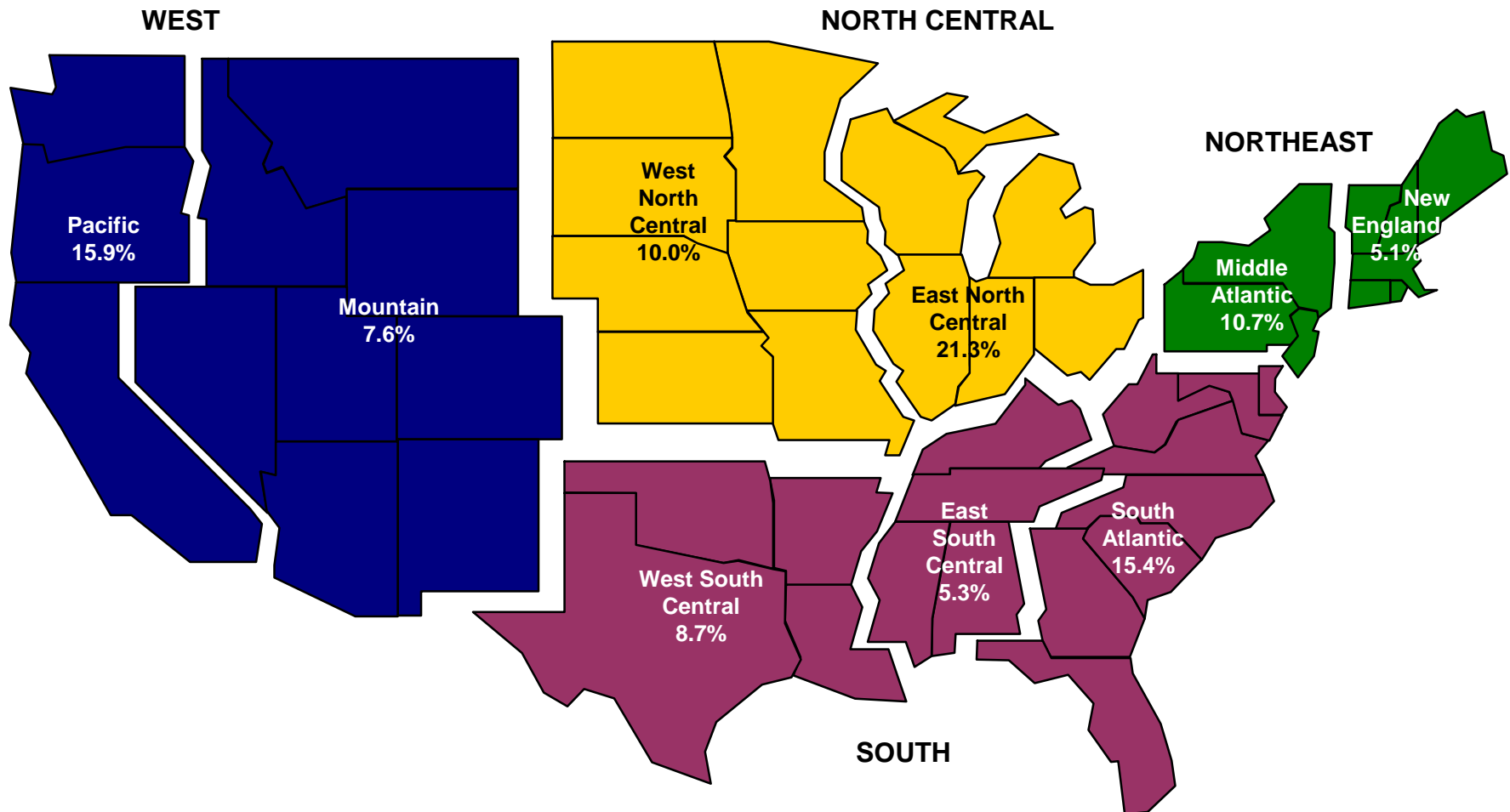
6. Riding risk factors
  - ✓ Threat perception
  - ✓ Participation in risky riding
7. Accident and crash history
8. Ownership/Use of protective riding gear
9. Drinking and driving
  - ✓ Attitudes
  - ✓ Past behavior (car and motorcycle)
10. Attitudes/Membership in motorcycle-related clubs
11. Involvement 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

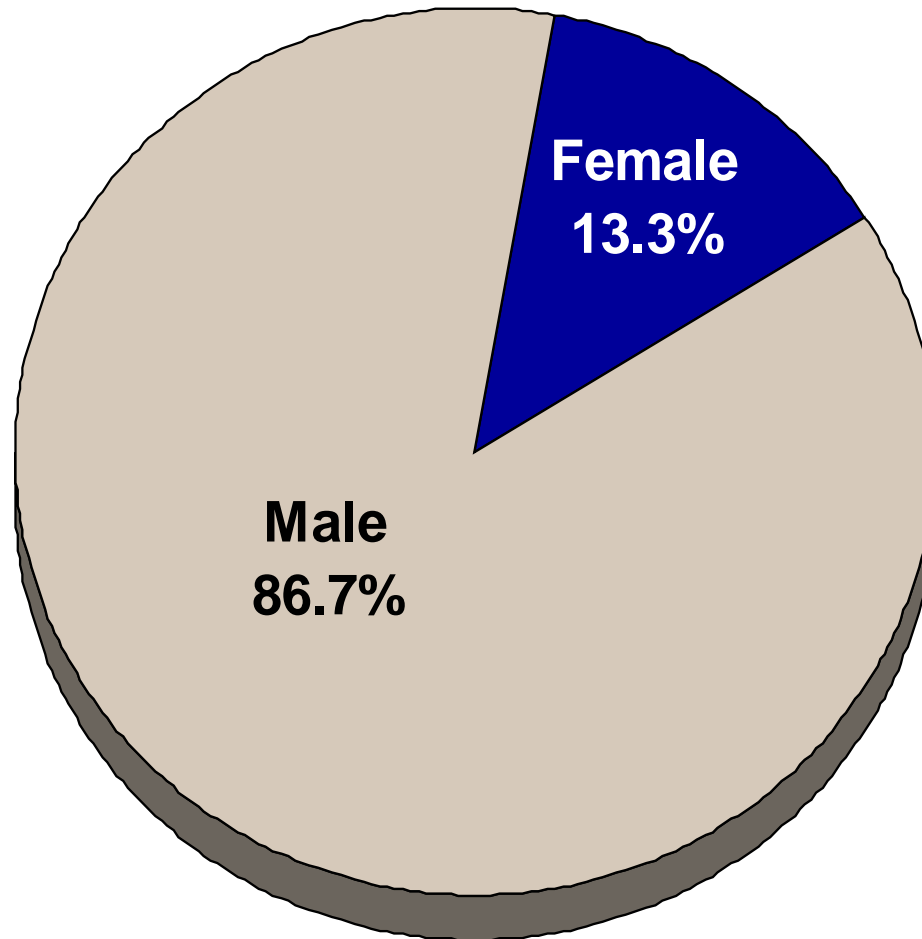
## U.S. Region



Base: All Respondents (1,203)

# Respondent Analysis Groups

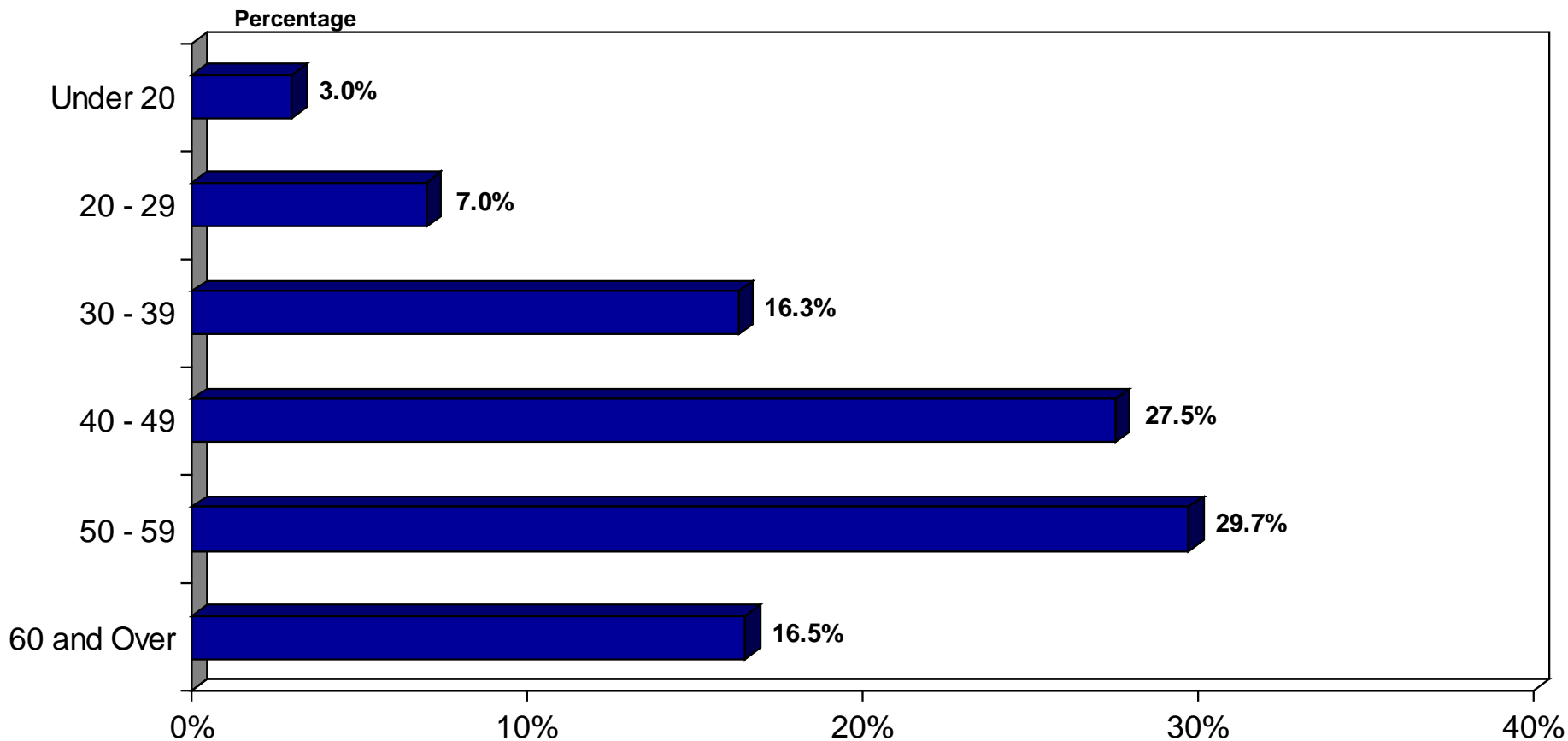
## Gender



Base: All Respondents (1,203)

# Respondent Analysis Groups

## Age

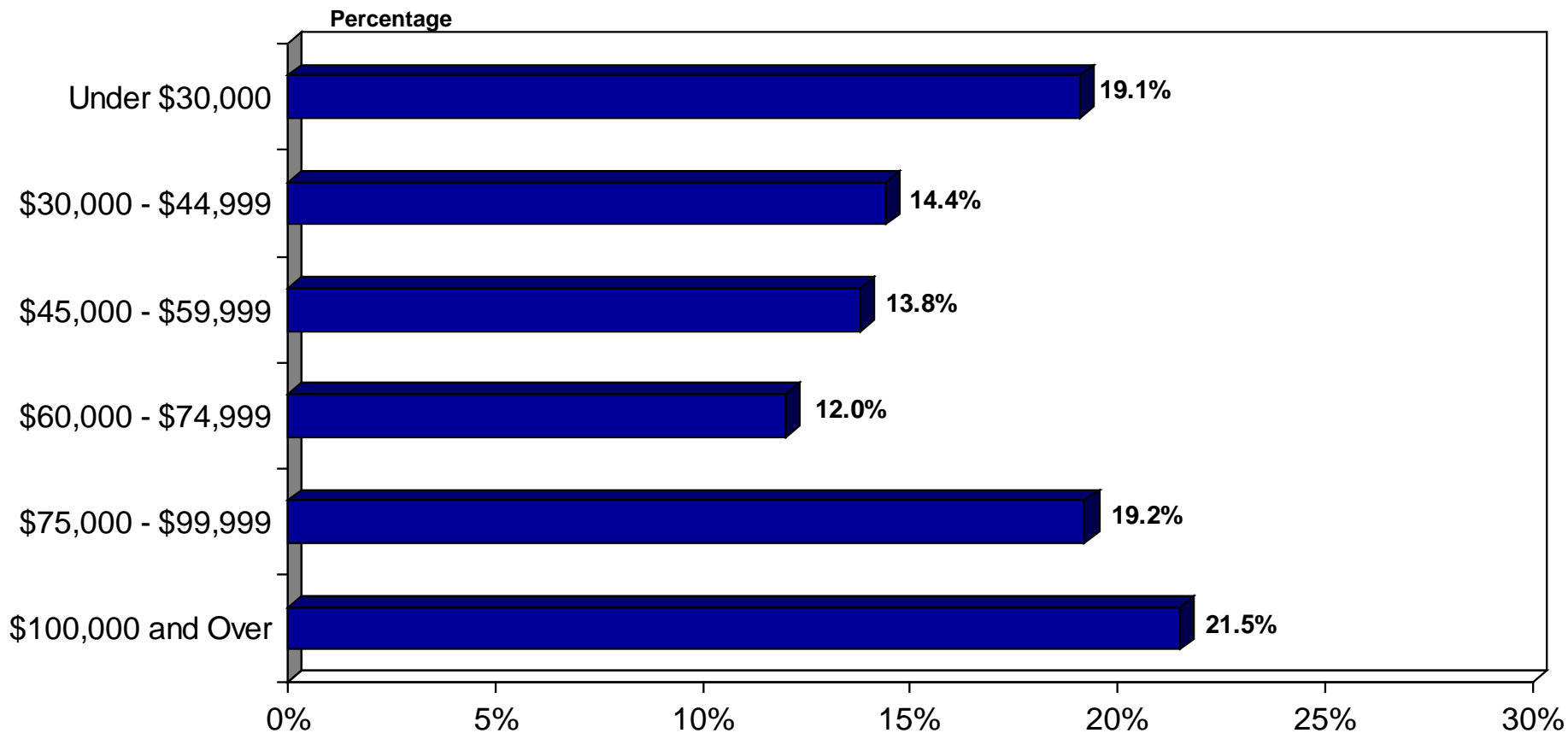


**Mean age: 47.4 years old**



# Respondent Analysis Groups

## Household Income

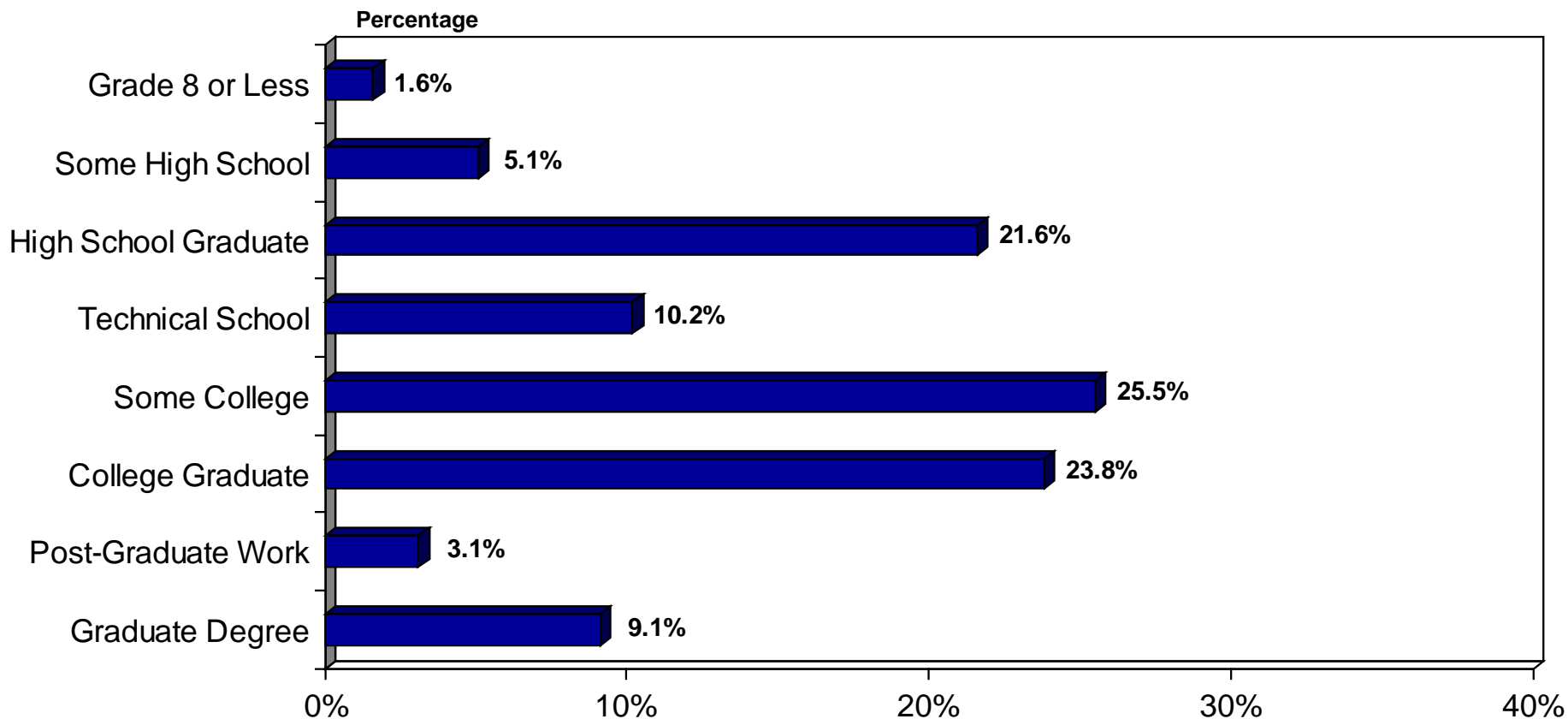


**Mean: \$73,761**  
**Median: \$63,385**

Base: All Respondents (1,203)

# Respondent Analysis Groups

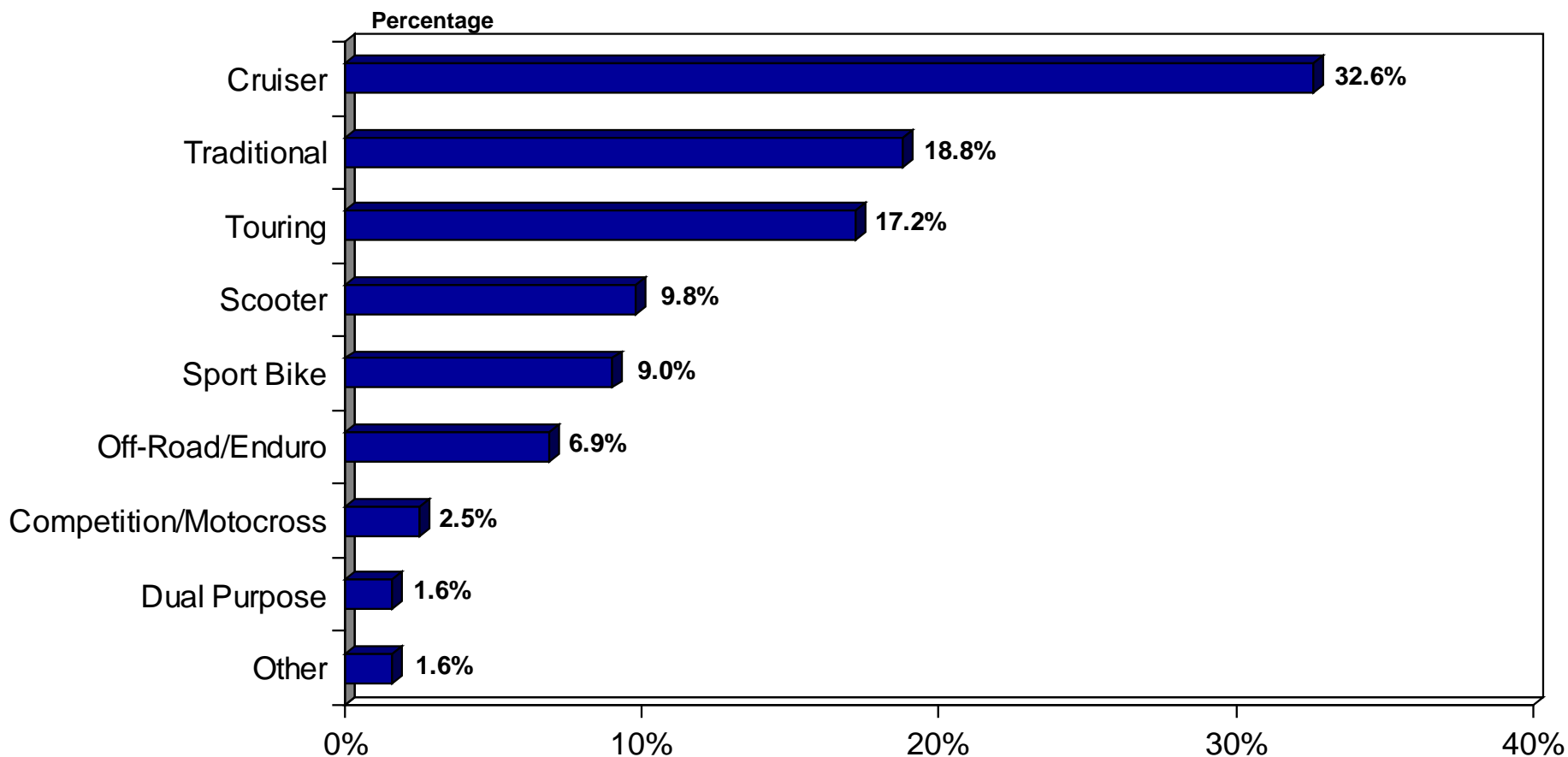
## Education



**Mean # of years: 14.2**

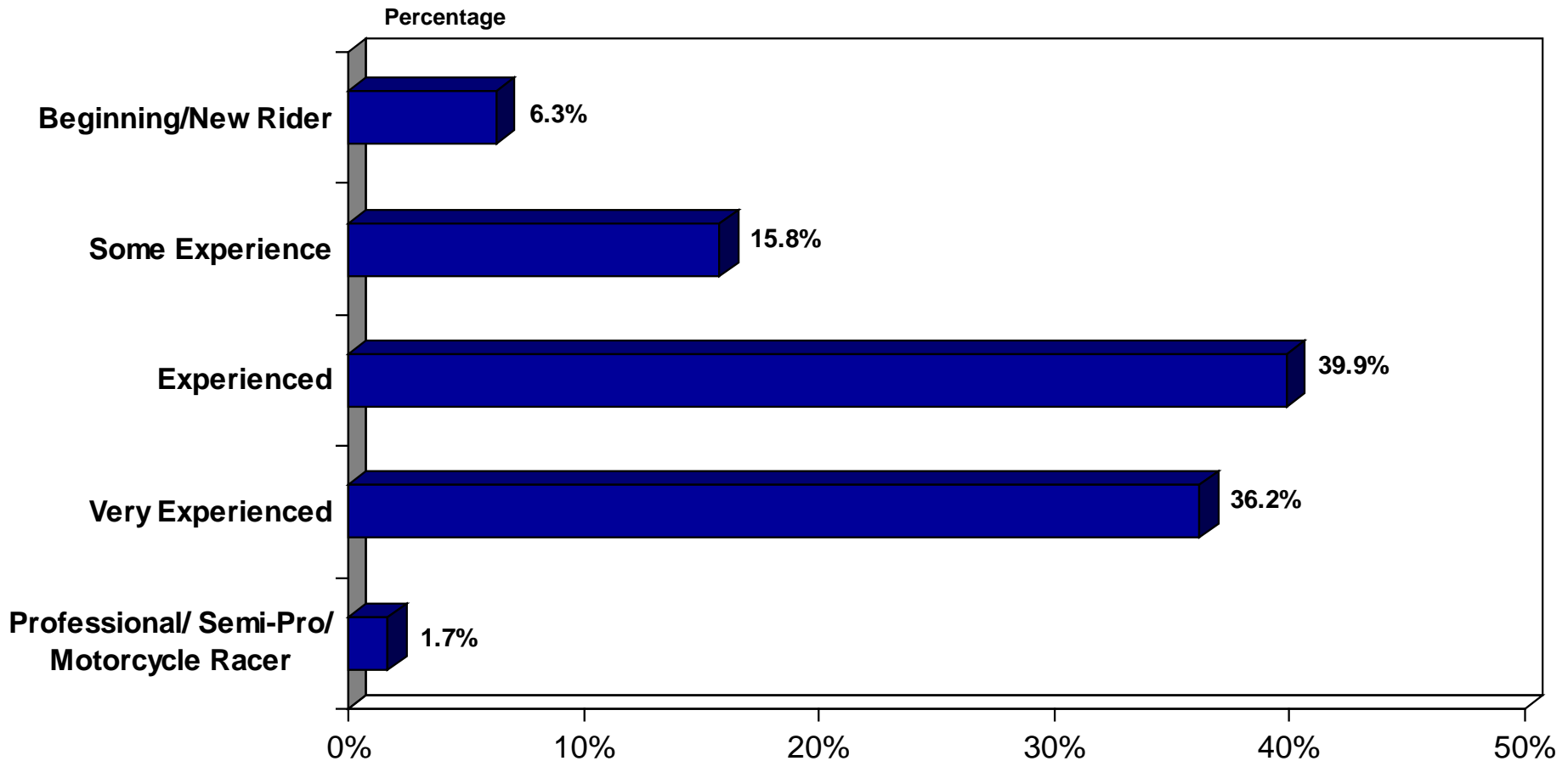
# Respondent Analysis Groups

## Motorcycle Type\*



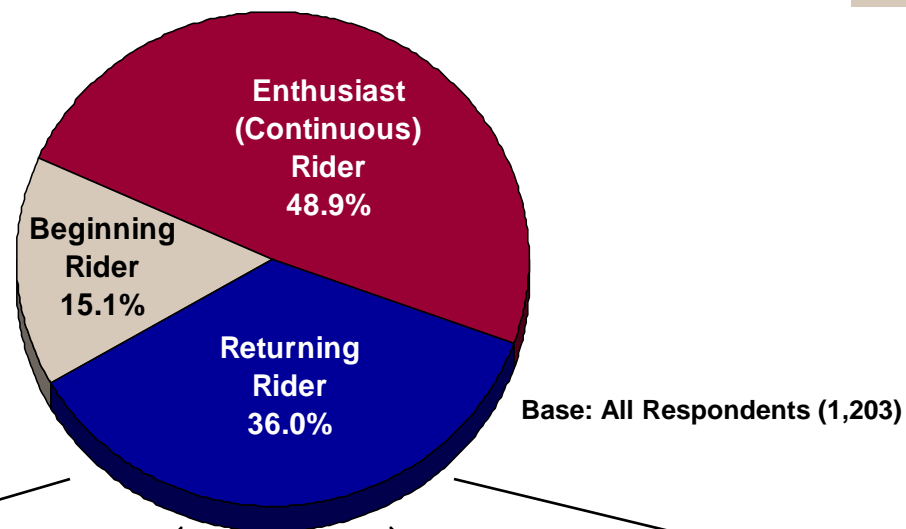
# Respondent Analysis Groups

## Motorcycle Riding Experience



Base: All Respondents (1,203)

# Rider Definition



### 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%
<b>Mean (yrs)</b>	<b>10.0</b>
<b>Median (yrs)</b>	<b>10.0</b>

### 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%
<b>Mean (yrs)</b>	<b>12.7</b>
<b>Median (yrs)</b>	<b>10.0</b>

### Took a Motorcycle Training or Safety Course Before Riding Again:

Yes	21.4%
No	78.6%

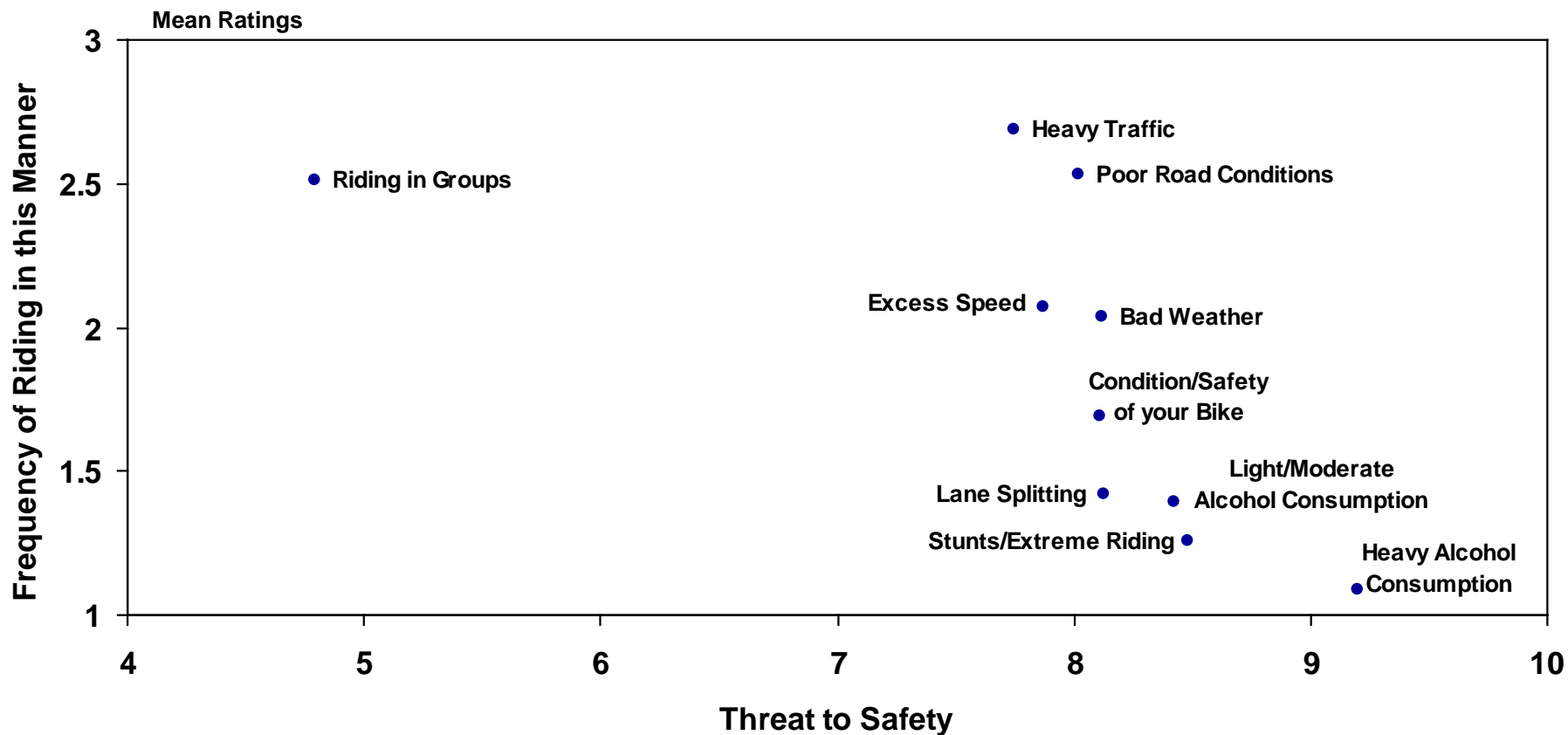
### Why Started Riding Again:\*

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%

# 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



# Motorcycle Riding Risk Factors

## Mean Frequency Ratings

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