**Annex 1**

**The European Motorcyclists Survey**  
*A picture of Motorcycling in Europe*

Please refer to this report as follows:

**GRANT AGREEMENT NUMBER** MOVE/C4/SUB/2010-125/SI2.603201/RIDERSCAN

**Project Coordinator:** Aline Delhaye, Federation of European Motorcyclists’ Associations (FEMA), Rue des champs, n°62, 1040, Etterbeek (Brussels), Belgium

**Project Start date:** 01/11/2011  
**Duration:** 42 months

<table>
<thead>
<tr>
<th>Organisation name of lead contractor for this deliverable:</th>
<th>Federation of European Motorcyclists’ Associations (FEMA), Belgium</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Report Author(s):</strong></td>
<td>Aline Delhaye, Federation of European Motorcyclists’ Associations (FEMA), Belgium</td>
</tr>
<tr>
<td></td>
<td>Laura Marot, Federation of European Motorcyclists’ Associations (FEMA), Belgium</td>
</tr>
<tr>
<td></td>
<td>Christine Hesse, SONECOM, Belgium</td>
</tr>
</tbody>
</table>

| **Due date of deliverable:** | 30/04/2015 | **Submission date:** | 30/04/2015 |

**Project co-funded by the European Commission**

**Dissemination Level:** public
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1. Objective

The European Motorcyclists Survey aimed at collecting information about the motorcycling community around Europe in order to have a better overview of similarities and differences in terms of riding and attitudes, and better identify the safety needs of the motorcycling community:

- Motorcycle usage and transport habits
- Motorcycle equipment
- Accident and near-accident causation and consequences
- Assessment of safety-related statements on motorcycling
- Motorcyclists’ information sources

2. Methodology

The European Motorcyclists Survey was organised as an open participation survey. This method was preferred to a controlled group of riders, since interest in the survey topic was a prerequisite. However, the open participation method can create a bias in the sample of respondents. This point will be discussed in greater detail below.

The survey consisted of 4 parts:

I. General information: this part of the survey aimed at segmenting motorcyclists per country according to basic socio-economic information.

II. Mobility habits: This part of the survey aimed at understanding what kind of journeys motorcyclists undertake in general and more specifically with their powered two wheelers.

III. Riding habits: This part of the survey aimed at gaining more details on riding habits.

IV. Safety habits: This part of the survey aimed at gaining more details on safety habits.

The survey was open to the general public in each participating country for a duration of 6 months. It was available in the following languages: Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hungarian, Italian, Norwegian, Polish, Portuguese, Slovenian, Spanish and Swedish. Identification was required to participate, enabling respondents to complete the questionnaire in stages and preventing duplicate answers from the same subject.

The survey was advertised through rider clubs and national press:

<table>
<thead>
<tr>
<th>Country</th>
<th>Media Partners</th>
<th>Motorcyclists’ Associations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium (Flanders)</td>
<td>MOTORRIJDER</td>
<td>MAG Belgium</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>CMN</td>
<td>UAMK</td>
</tr>
<tr>
<td>Denmark</td>
<td>Touring Nyt</td>
<td>MC Touring Club</td>
</tr>
</tbody>
</table>
Some European countries have well participated some less.

In fact certain relevant countries, based on PTW usage, are hardly represented at all (e.g. Spain, with only 529 responses), while other countries, although relevant (e.g. France) are overrepresented.

In order to obtain European results that reflect exactly the real population and then obtained a representative data set, the results have thus to be weighted.

The representative’s criteria that has been selected is the number of motorcyclists counted by country (reference population N of which your sample n must be representative), and not the number of accidents (PTW).
To achieve the weighting, we take the figures of the ACEM for year 2012, because for year 2013, figures for certain countries are lacking.

<table>
<thead>
<tr>
<th></th>
<th>MPs</th>
<th>MCs</th>
<th>Total</th>
<th>Weight in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>AU</td>
<td>300 209</td>
<td>430 842</td>
<td>731 051</td>
</tr>
<tr>
<td></td>
<td>BE</td>
<td>240 000</td>
<td>441 324</td>
<td>681 324</td>
</tr>
<tr>
<td></td>
<td>BG</td>
<td>139 800</td>
<td></td>
<td>139 800</td>
</tr>
<tr>
<td></td>
<td>CY</td>
<td>21 890</td>
<td>33 270</td>
<td>55 160</td>
</tr>
<tr>
<td></td>
<td>CZ</td>
<td>481 076</td>
<td>495 835</td>
<td>976 911</td>
</tr>
<tr>
<td></td>
<td>DE</td>
<td>2 024 633</td>
<td>3 843 155</td>
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<tr>
<td></td>
<td>DK</td>
<td>51 780</td>
<td>149 665</td>
<td>201 445</td>
</tr>
<tr>
<td></td>
<td>EE</td>
<td>12 431</td>
<td>22 842</td>
<td>35 273</td>
</tr>
<tr>
<td></td>
<td>EL</td>
<td>220 000</td>
<td>1 556 435</td>
<td>1 776 435</td>
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<tr>
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<td>ES</td>
<td>2 169 668</td>
<td>2 852 297</td>
<td>5 021 965</td>
</tr>
<tr>
<td></td>
<td>FI</td>
<td>291 364</td>
<td>243 479</td>
<td>534 843</td>
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<td></td>
<td>FR</td>
<td>1 414 978</td>
<td>1 674 147</td>
<td>3 089 125</td>
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<td></td>
<td>HR</td>
<td>98 975</td>
<td>58 006</td>
<td>156 981</td>
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<td></td>
<td>HU</td>
<td>151 346</td>
<td>151 346</td>
<td>302 692</td>
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<td></td>
<td>IE</td>
<td>35 106</td>
<td>35 106</td>
<td>70 212</td>
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<td></td>
<td>IT</td>
<td>2 100 000</td>
<td>6 482 796</td>
<td>8 582 796</td>
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<td></td>
<td>LT</td>
<td>20 644</td>
<td>43 605</td>
<td>64 249</td>
</tr>
<tr>
<td></td>
<td>LU</td>
<td>27 998</td>
<td>16 528</td>
<td>44 526</td>
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<td></td>
<td>LV</td>
<td>17 879</td>
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<td>35 758</td>
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<td>MT</td>
<td>15 815</td>
<td>15 815</td>
<td>31 630</td>
</tr>
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<td></td>
<td>NL</td>
<td>557 484</td>
<td>653 245</td>
<td>1 210 729</td>
</tr>
<tr>
<td></td>
<td>PL</td>
<td>1 100 296</td>
<td>1 107 260</td>
<td>2 207 556</td>
</tr>
<tr>
<td></td>
<td>PT</td>
<td>278 257</td>
<td>222 558</td>
<td>500 815</td>
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<td></td>
<td>RO</td>
<td>1 704</td>
<td>93 622</td>
<td>95 326</td>
</tr>
<tr>
<td></td>
<td>SE</td>
<td>73 661</td>
<td>284 212</td>
<td>357 873</td>
</tr>
<tr>
<td></td>
<td>SK</td>
<td>68 063</td>
<td>68 063</td>
<td>136 126</td>
</tr>
<tr>
<td></td>
<td>SI</td>
<td>42 101</td>
<td>50 999</td>
<td>93 100</td>
</tr>
<tr>
<td></td>
<td>UK</td>
<td>134 100</td>
<td>1 224 849</td>
<td>1 358 949</td>
</tr>
<tr>
<td></td>
<td>CH</td>
<td>170 739</td>
<td>679 822</td>
<td>850 561</td>
</tr>
<tr>
<td></td>
<td>NO</td>
<td>174 873</td>
<td>156 826</td>
<td>331 699</td>
</tr>
<tr>
<td></td>
<td>NO</td>
<td>10 100</td>
<td></td>
<td>10 100</td>
</tr>
<tr>
<td><strong>Total Europe</strong></td>
<td><strong>35 264 589</strong></td>
<td><strong>100%</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 2 ACEM’ Figures for 2012

Realize a weighting mean giving the real weight of every country in Europe according to the figures of the motorcycle park on 2012 (Weight in %).
Figure 3 Distribution of the European sample (weighted and not)
Creation of a European representative dataset

Two issues have to be considered in this process to intervene in the original dataset:

- Country underrepresentation (e.g. Spain) – 3% in the observed sample and normally it could have been 14.2% ;
- Country overrepresentation (e.g. France) – 12.8% in the observed sample and normally it could have been 8.8%.

While the first issue constitutes a limitation of the current study without any way to overcome it, the latter can be tackled through resampling the original dataset by a weighting.

The procedure used to evaluate the best weighting solution was:

- selection of a criterion (i.e. the volume of the motorcycle’s park) and calculation of each country’s representativeness (i.e. percentage of data in the dataset for the specific country);
- calculation of the expected % (see weight %) in the survey for each country,
- and Apply a weight to every country (> 1 if sub-representation and < 1 money on representation) ; The weighting means giving the real weight to every individual - Weight=% Real / % Sample

<table>
<thead>
<tr>
<th>Country</th>
<th>% Real (ACEM 2012)</th>
<th>% Observed Sample</th>
<th>Coefficient of weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>2.07%</td>
<td>0.64%</td>
<td>3.23</td>
</tr>
<tr>
<td>Belgium</td>
<td>1.93%</td>
<td>1.68%</td>
<td>1.15</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>0.40%</td>
<td>0.01%</td>
<td>70.23</td>
</tr>
<tr>
<td>Croatia</td>
<td>0.45%</td>
<td>0.02%</td>
<td>19.75</td>
</tr>
<tr>
<td>Cyprus</td>
<td>0.16%</td>
<td>0.09%</td>
<td>1.76</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>2.77%</td>
<td>9.70%</td>
<td>0.29</td>
</tr>
<tr>
<td>Denmark</td>
<td>0.57%</td>
<td>3.60%</td>
<td>0.16</td>
</tr>
<tr>
<td>Estonia</td>
<td>0.10%</td>
<td>0.20%</td>
<td>0.50</td>
</tr>
<tr>
<td>Finland</td>
<td>1.52%</td>
<td>9.47%</td>
<td>0.16</td>
</tr>
<tr>
<td>France</td>
<td>8.76%</td>
<td>12.77%</td>
<td>0.69</td>
</tr>
<tr>
<td>Germany</td>
<td>16.64%</td>
<td>15.95%</td>
<td>1.04</td>
</tr>
<tr>
<td>Greece</td>
<td>5.04%</td>
<td>6.06%</td>
<td>0.83</td>
</tr>
<tr>
<td>Hungary</td>
<td>0.43%</td>
<td>0.05%</td>
<td>8.39</td>
</tr>
<tr>
<td>Iceland</td>
<td>0.03%</td>
<td>0.01%</td>
<td>5.27</td>
</tr>
<tr>
<td>Ireland</td>
<td>0.10%</td>
<td>0.61%</td>
<td>0.16</td>
</tr>
<tr>
<td>Italy</td>
<td>24.34%</td>
<td>12.04%</td>
<td>2.02</td>
</tr>
<tr>
<td>Latvia</td>
<td>0.05%</td>
<td>0.03%</td>
<td>1.76</td>
</tr>
<tr>
<td>Lithuania</td>
<td>0.18%</td>
<td>0.01%</td>
<td>15.80</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>0.13%</td>
<td>0.05%</td>
<td>2.54</td>
</tr>
<tr>
<td>Malta</td>
<td>0.04%</td>
<td>0.01%</td>
<td>7.02</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3.43%</td>
<td>1.47%</td>
<td>2.33</td>
</tr>
<tr>
<td>Norway</td>
<td>0.94%</td>
<td>3.00%</td>
<td>0.31</td>
</tr>
<tr>
<td>Poland</td>
<td>6.26%</td>
<td>0.84%</td>
<td>7.43</td>
</tr>
<tr>
<td>Portugal</td>
<td>1.42%</td>
<td>2.26%</td>
<td>0.63</td>
</tr>
<tr>
<td>Romania</td>
<td>0.27%</td>
<td>0.07%</td>
<td>3.95</td>
</tr>
<tr>
<td>Slovakia</td>
<td>0.19%</td>
<td>0.28%</td>
<td>0.68</td>
</tr>
</tbody>
</table>
A variable in the dataset correspond to the coefficient for each country: “ADJUSTMENT-ACEM2012”.

The procedure could not solve the problem of extreme underrepresentation of certain countries (mainly Bulgaria, Croatia, Lithuania, Hungary and Poland), since no sufficient data were available. This is a consequence of the initial decisions related to the dissemination of the survey among the riders, and it has to be taken into account when analysing the results of the European dataset. The results have to be read with this precaution for these countries.

**Figure 5 Distribution of responses per country in the normalized European dataset**

- **Countries groups**

In order to enhance geographical trends, countries are sometimes grouped in for part of Europe:

<table>
<thead>
<tr>
<th>Western Europe</th>
<th>Northern Europe</th>
<th>Central and Eastern Europe</th>
<th>Southern Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>Denmark</td>
<td>Bulgaria</td>
<td>Cyprus</td>
</tr>
<tr>
<td>Belgium</td>
<td>Finland</td>
<td>Croatia</td>
<td>Greece</td>
</tr>
</tbody>
</table>
3. Data analysis

3.1. Motorcyclists Profiles

- National motorcyclist association and motorcycling club membership

In the normalized European dataset, 22.8% of the respondents are members of a national motorcyclist association and 32.7% are members of a motorcycling club (Figure 6). Membership rates vary greatly from country to country, with the North of Europe showing the highest affiliation rates (Figure 7).

<table>
<thead>
<tr>
<th>members of a national motorcyclists association</th>
<th>members motorcycling club</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>Finland</td>
</tr>
<tr>
<td>88.1%</td>
<td>62.7%</td>
</tr>
<tr>
<td>Denmark</td>
<td>Norway</td>
</tr>
<tr>
<td>87.8%</td>
<td>59.9%</td>
</tr>
<tr>
<td>Norway</td>
<td>Germany</td>
</tr>
<tr>
<td>72.8%</td>
<td>52.1%</td>
</tr>
<tr>
<td>Country</td>
<td>Membership Rate</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Switzerland</td>
<td>63.7%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>62.6%</td>
</tr>
<tr>
<td>Finland</td>
<td>55.4%</td>
</tr>
<tr>
<td>Spain</td>
<td>54.3%</td>
</tr>
<tr>
<td>France</td>
<td>31.3%</td>
</tr>
<tr>
<td>Belgium</td>
<td>25.9%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>25.4%</td>
</tr>
<tr>
<td>Greece</td>
<td>9.7%</td>
</tr>
<tr>
<td>Italy</td>
<td>7.4%</td>
</tr>
<tr>
<td>Germany</td>
<td>5.9%</td>
</tr>
<tr>
<td>Portugal</td>
<td>5.4%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

Figure 7 Membership rate of a national motorcyclist association/motorcycling club per country (answers per country)

- **Motorcycle magazines readership**

Conversely, the EU dataset reveals great interest for motorcycle magazines throughout Europe (Figure 8). This is confirmed for all countries, with UK riders showing the greatest interest (91.1%) and Greek riders the lowest (though still 57%). In Denmark, Sweden and Switzerland, the rate of respondents reading motorcycle magazines is really high (more than 80%) and it is also in these countries that we found a large rate of motorcyclist association membership (more than 63% in Switzerland and more than 87% in Denmark and Sweden) (Figure 9) – a very interesting fact to be considered when preparing safety awareness campaigns.

<table>
<thead>
<tr>
<th>Readers of motorcycle magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
</tr>
<tr>
<td>Denmark</td>
</tr>
<tr>
<td>Sweden</td>
</tr>
<tr>
<td>Switzerland</td>
</tr>
<tr>
<td>Portugal</td>
</tr>
</tbody>
</table>

Figure 8 Breakdown of motorcycle magazine readership (EU dataset)
<table>
<thead>
<tr>
<th>Country</th>
<th>Readership Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>79.6%</td>
</tr>
<tr>
<td>Italy</td>
<td>78.0%</td>
</tr>
<tr>
<td>Norway</td>
<td>77.7%</td>
</tr>
<tr>
<td>France</td>
<td>76.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>67.8%</td>
</tr>
<tr>
<td>Finland</td>
<td>67.7%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>63.4%</td>
</tr>
<tr>
<td>Spain</td>
<td>60.2%</td>
</tr>
<tr>
<td>Belgium</td>
<td>59.7%</td>
</tr>
<tr>
<td>Greece</td>
<td>57.5%</td>
</tr>
</tbody>
</table>

Figure 9 Readership rate of motorcycle magazines per country (answers per country)

3.2. Vehicle use and data

- Vehicle data

Number of motorcycle(s) owned by a rider

The European dataset shows that the vast majority of riders own just one powered two-wheeler (Figure 10). However, geographical differences can be observed. Motorcyclists from Southern European countries tend to own just one PTW, as is the case in France (68.6%), Spain (68.1%) and Portugal (67.9%). By contrast, riders from Northern European countries tend to own several bikes. Riders from Norway, Sweden and Switzerland owned the highest number, with 9.2%, 9.6% and 9.6% of them respectively owning more than 3 powered two-wheelers.

Engine size

The European dataset shows that the majority of bikes owned have engine sizes exceeding 400 cm³, with a reasonably equal share between bikes above 400 cm³, above 700 cm³, and
above 1000 cm$^3$.

![Figure 11 Engine size breakdown of PTWs owned in Europe (Merged answers) (EU dataset)](image)

A national analysis shows that:

- The Czech Republic is the country with the largest number of PTWs with an engine size below 125 cm$^3$ (16.8%). This smallest engine size is least represented in Switzerland, where such PTWs constitute just 2% of all PTWs owned by respondents.

- Greece has the highest number of 125-400 cm$^3$ PTWs (representing 29.2% of all PTWs).

- 401-700 cm$^3$ is the most popular engine size in the Czech Republic, France, Greece, Portugal and Spain. In Portugal, 37.4% of PTWs have this engine size.

- 701-1000 cm$^3$ is the most popular engine size in Germany, Italy, though the Netherlands has the highest percentage of this engine size (32.2% of PTWs).

- Finally, motorcycles exceeding 1000 cm$^3$ are the most popular in Belgium, Denmark, Finland, the Netherlands, Norway, Sweden, Switzerland and the United Kingdom. In Belgium, motorcycles exceeding 1000 cm$^3$ represent 45.3% of all PTWs!

- It should be noted that the breakdown of engine size is quite homogeneous in Czech Republic (Figure 12). By contrast, the breakdown in Belgium is quite unbalanced, with 3 engine size representing more than 88% of PTWs owned by respondents. Moreover, the most popular engine size accounts for approximately 45% of vehicles, while the second most popular size accounts for just 22% (Figure 13).
Figure 12 Breakdown by engine size for PTWs in the Czech Republic (Merged answers)

Figure 13 Breakdown by engine size for PTWs in Belgium (Merged answers)

Type of vehicle

Figure 14 Breakdown by vehicle type in Europe (Merged answers) (EU dataset)
The preferred type of vehicle varies greatly from one country to another without any real geographical trend: Standard motorcycles are the most popular type of PTW in the Czech Republic, France (33.3%), Germany, Italy, Portugal and Switzerland. Sport Touring motorcycles are the most popular type in Denmark, the Netherlands, Norway, Spain and the United Kingdom. In Denmark, they account for 32.7% of all PTWs. On/off road bikes are the most popular type in Greece and Sweden. In Greece, they represent 30.7% of all PTWs. Touring bikes are the most popular type in Belgium, representing 24.1% of PTWs. Custom bikes are the most popular type in Finland, representing 21.1% of PTWs. Greece has the highest rate of scooters (27.7%) and electric (0.5%) PTWs declared by survey respondents (Figure 15).

Figure 15 Breakdown by vehicle type in Greece (Merged answers) (Greece)

<table>
<thead>
<tr>
<th>Brand</th>
<th>No.</th>
<th>% cit.</th>
</tr>
</thead>
<tbody>
<tr>
<td>HONDA</td>
<td>4331</td>
<td>19.5%</td>
</tr>
<tr>
<td>BMW</td>
<td>3226</td>
<td>14.5%</td>
</tr>
<tr>
<td>YAMAHA</td>
<td>2956</td>
<td>13.3%</td>
</tr>
<tr>
<td>SUZUKI</td>
<td>2890</td>
<td>13.0%</td>
</tr>
<tr>
<td>KAWASAKI</td>
<td>1788</td>
<td>8.1%</td>
</tr>
<tr>
<td>Total</td>
<td>22196</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Brand
These are the top 5 brands in most surveyed countries (Belgium, the Czech Republic, Denmark, France, Germany, the Netherlands, Norway, Portugal, Spain and Sweden). Harley Davidson enters the top 5 in Finland (10.5% of PTWs owned by respondents) and Switzerland (7.6%). In Greece, Piaggio accounts for 6.5% of PTWs, as can be expected when we recall that 27.7% of Greek respondents are scooter owners.

Italian and UK riders show a certain national preference in their choices: in Italy, Ducati is the third most popular brand (11.2%), while in the United Kingdom, Triumph is the fourth brand (12.7%). This preference for national brands is also confirmed in the German answers, with BMW taking top place (18.1%).

- **Vehicle use**

  - **Transport use – Preferred means of transport**

![Figure 17 Most used means of transport (EU dataset)](image)

The EU sample of answers shows a fairly balanced share between cars and PTWs; both are declared by over 40% of respondents as the most used means of transport. (Figure 17)
Car and PTW usage is more or less balanced in Belgium, France, Italy, the Netherlands, Portugal, Spain and the United Kingdom. In the Czech Republic, Denmark, Finland, Germany, Norway, Sweden and Switzerland car usage is higher than PTW use, while in Greece, the reverse is true, with car usage at 26.7% and PTW usage at 66.4%. Clearly, a geographical trend can be seen, with the proportion of PTW usage dropping in Northern European countries where the weather makes riding more difficult throughout the year (Figure 18)

Mileage

![Mileage Graph]

Figure 19 Approximate annual mileage by car (EU dataset)
The EU sample shows that half of the respondents clock up over 10,000km/year by car, and close to 30% over 15,000km. (Figure 19)

<table>
<thead>
<tr>
<th>Country</th>
<th>Drive more than 10,000km/year</th>
<th>Drive more than 15,000km/y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>55.8%</td>
<td>36%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>50.3%</td>
<td>32.3%</td>
</tr>
<tr>
<td>Denmark</td>
<td>68.2%</td>
<td>46.2%</td>
</tr>
<tr>
<td>Finland</td>
<td>68.5%</td>
<td>48.5%</td>
</tr>
<tr>
<td>France</td>
<td>50.9%</td>
<td>30.1%</td>
</tr>
<tr>
<td>Germany</td>
<td>56.2%</td>
<td>34.9%</td>
</tr>
<tr>
<td>Greece</td>
<td>21.4%</td>
<td>10.4%</td>
</tr>
<tr>
<td>Italy</td>
<td>49.5%</td>
<td>29.1%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>50%</td>
<td>34.3%</td>
</tr>
<tr>
<td>Norway</td>
<td>63.9%</td>
<td>33.9%</td>
</tr>
<tr>
<td>Portugal</td>
<td>43.7%</td>
<td>28.3%</td>
</tr>
<tr>
<td>Spain</td>
<td>37.4%</td>
<td>19.8%</td>
</tr>
<tr>
<td>Sweden</td>
<td>39.4%</td>
<td>24.8%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>51.8%</td>
<td>28.5%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>46.4%</td>
<td>21.6%</td>
</tr>
</tbody>
</table>

Figure 20 Percentage of respondents driving more than 10,000 km per year (answer per countries)

A country comparison (Figure 20) shows that this proportion is quite similar in every country selected except Greece, Spain and Sweden where respondents drive less than in other European countries: In Greece, more than 50% of respondents drive less than 5,000 km per year by car. In Sweden, more than 50% of the respondents drive less than 7,000 km per year by car. In Spain, more than 53% of the respondents drive more than 7,000 km per year by car, though less than 38% drive more than 10,000 km.

The EU sample shows that average mileage by PTW is generally between 3,000 and 10,000km/year (Figure 21)
A country comparison shows that no specific geographical trend:

- in *Sweden*, the largest group of riders (24.3% of our respondents) rides between 1,000 to 3,000km a year;
- the largest group of riders in *Czech Republic* (26.6% of respondents), *Germany* (22.6%), *Portugal* (19.9%) and the *United Kingdom* (22.3%) ride between 3,001 and 5,000km a year;
- the largest group of riders in *Denmark* (20.3% of respondents), *Finland* (20.8%), *Greece* (23.1%), *Italy* (20.6%), *Spain* (20.1%) and *Switzerland* (22.1%) ride between 7,001 and 10,000km a year;
- the largest group of riders in *Belgium* (23.1% of respondents), *France* (20.7%) and *Norway* (21.1%) ride between 10,001 and 15,000km a year;
- in *the Netherlands*, the largest group of riders (22.3% of respondents) rides more than 15,000km a year.

![Motorcycle usage](image)

*Figure 22 PTW usage (EU dataset)*

**Respondents had to evaluate their PTW usage in percent (question 74).**

In almost all selected countries, the primary use of the PTW is for leisure. In Germany, the Czech Republic, Switzerland, Sweden and Italy, this proportion exceeds 50% of respondents’ total PTW usage (Figure 23). Greece and Portugal are the only countries where PTWs are primarily used for commuting. (Figure 23).

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage of use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>60.52%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>58.72%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>55.87%</td>
</tr>
<tr>
<td>Sweden</td>
<td>55.25%</td>
</tr>
<tr>
<td>Italy</td>
<td>52.30%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>48.83%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage of use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>51.25%</td>
</tr>
<tr>
<td>Portugal</td>
<td>43.40%</td>
</tr>
<tr>
<td>Spain</td>
<td>39.11%</td>
</tr>
<tr>
<td>France</td>
<td>36.27%</td>
</tr>
<tr>
<td>Belgium</td>
<td>32.27%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>30.20%</td>
</tr>
</tbody>
</table>
A national comparison tells us that the countries where riders use their PTW every day - Greece (73.4%), Spain (37.4%), Portugal (37.2%) and Italy (32.1%) - are all Southern European countries where weather conditions are mild enough to allow riding throughout the year. This is also in line with the fact that Greece, Portugal and Spain have the highest rates of PTW commuting (Figure 23). It should also be noted that Greece has the highest percentage of scooters – a typical urban vehicle – among the PTWs owned by respondents (Figure 15).

Countries where riders use their PTW only during the summer - Norway (80.2%), Denmark (73.0%), Sweden (70.4%) and Finland (69.1%) - are logically Nordic countries where weather conditions make riding difficult outside summer.

### Riding habits

<table>
<thead>
<tr>
<th>III-25 - Do you ride most of the time...</th>
<th>No.</th>
<th>% cit.</th>
</tr>
</thead>
<tbody>
<tr>
<td>alone</td>
<td>11851</td>
<td>67.8%</td>
</tr>
<tr>
<td>with a friend or as a passenger</td>
<td>1933</td>
<td>11.1%</td>
</tr>
<tr>
<td>with another motorcyclist</td>
<td>1611</td>
<td>9.2%</td>
</tr>
<tr>
<td>with a few other motorcyclists (&lt;10)</td>
<td>1785</td>
<td>10.2%</td>
</tr>
<tr>
<td>with many other motorcyclists (groups/club/organized rides &gt;10)</td>
<td>297</td>
<td>1.7%</td>
</tr>
<tr>
<td>Total</td>
<td>17476</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Figure 25 Riding habits and group riding (EU dataset)
The vast majority of riders in Europe generally ride alone (67.8%), while a tiny minority rides in groups of over 10 riders (1.7%) (Figure 25).

A country analysis further illustrates that group (>10) riding is more common in Denmark where 6.6% of riders ride most of the time with many other motorcyclists, followed by Belgium at 4.1%. For the other selected countries, this proportion drops below 3%.

Not surprisingly, answers about riding in specific weather conditions were strongly influenced by the respondent’s country.

Riders have no problem riding in the rain in the Netherlands (65.1%), the United Kingdom (62.2%) and Norway (61.5%). Conversely, 25.6% of riders in Italy, Portugal (24.9%), in Czech Republic (24.5%) and Greece (24.5%) avoid riding in the rain. This difference is certainly linked with a country’s rain frequency and whether or not people are used to dealing with rain.

Moreover, 68.7% of Greek riders and 62.1% of Portuguese riders have no problem riding in wintry conditions and only 13.1% of Greeks and 16.3% of Portuguese try to avoid it. By contrast, in Norway 87% of riders try to avoid riding in wintry conditions, in Finland 86.7% of riders, in Denmark 84.9% of riders, and in Sweden 82% of riders. It is easy to see that this is linked to the fact that “wintry conditions” in Southern European countries are less harsh for motorcyclists than in the Nordics.

- Accidents data
  - Accidents - Accident involvement
The vast majority of riders in Europe stated not having been involved in any kind of accident in the twelve months preceding the survey (Figure 27);

A national analysis of answers shows that there are regional patterns to be considered (Figure 28 and Figure 29).
Figure 29 Have you been involved in an accident in any form during the last twelve months? (Part of Europe)

- **Number of accidents (merged)**

![Number of accidents](image)

Figure 30 Number of accidents in during the last twelve months (EU dataset)

- **Accident type (merged)**

![Accident type](image)

Figure 31 Accident type (merged answers) (EU dataset)

To be noted: respondents were allowed to tick more than one answer (for example “tilting standing still” is considered as a single accident; therefore, both cases could be ticked without being inconsistent).
Of the 12.4% of respondents stating they had had an accident in the last twelve months, somewhat more than 10% declared having had more than one accident (Figure 30).

Crossing these results with the age of the respondents, we can conclude that young riders are more involved in accidents that older ones. The two age groups more involved in accidents are the under-25s and the 25-34 age group. In every country, under-25s constitute the group most involved in accidents, except in Belgium, the Netherlands and Spain. The record was held by Portugal where 43.8% of under-25 riders had been involved in an accident during the last 12 months, followed by the United Kingdom (43.5%) and Switzerland (37.5%). The lowest numbers were for Belgium (16.7%), the Netherlands (12.5%) and Spain (10%), countries in which the 25-34 age group had a higher percentage of riders involved in an accident (22.9% for Belgium, 18.5% for the Netherlands and 18.4 for Spain).

In almost every country, the most common type of accident stated was a collision with another vehicle (54.9%), followed by a single accident (29%). Finland was the exception, with the order being reversed: of the 109 accidents declared (during the twelve last months), 44% were single accidents and 33.9% involved a collision with another vehicle.

Greece in turn had the highest rate of collisions with another vehicle (72.8%).

The highest rates of collisions with road infrastructure are to be found in Finland (19.3%), Spain (12.3%) and Belgium (11.8%). By contrast, Danish riders declared no accidents with road infrastructure.

Guilty part (merged)

The EU sample of those having been involved in an accident in the last twelve months comes up with the other road user as being responsible for the accident (45.4%), followed by own fault (34.1%) (Figure 32). 63.8% of accidents resulted in some form of physical harm with or without hospital treatment (Figure 33).
A comparison of national answers showed that the party responsible for the accident is the other road user in Greece, Belgium, France, the Czech Republic, the United Kingdom, Italy, Spain, Denmark, Portugal and the Netherlands; while in Norway, Germany, Finland, Sweden and Switzerland it is the rider himself (Figure 34).
Near-misses

When asked about near-misses, 27.9% of the EU sample stated not having experienced a near collision (Figure 35). All others stated having had at least one, due in the vast majority of cases (94.4%) to another driver’s error (Figure 36).

Infrastructure issues are particularly striking in Greece, Spain, Belgium, Italy and France where they were the cause of more than 30% of the near-miss accidents experienced by our respondents (Figure 37).

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>40.9%</td>
</tr>
<tr>
<td>Spain</td>
<td>38.6%</td>
</tr>
<tr>
<td>Belgium</td>
<td>37.7%</td>
</tr>
<tr>
<td>Italy</td>
<td>36.9%</td>
</tr>
<tr>
<td>France</td>
<td>36.5%</td>
</tr>
<tr>
<td>Finland</td>
<td>28.4%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>21.5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>18.3%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>17.6%</td>
</tr>
<tr>
<td>Portugal</td>
<td>15.7%</td>
</tr>
<tr>
<td>Germany</td>
<td>13.8%</td>
</tr>
<tr>
<td>Norway</td>
<td>12.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>11.7%</td>
</tr>
</tbody>
</table>
UK | 8.9%
---|---
Denmark | 6.2%

Figure 37 Rate of infrastructure problems in causing near-miss accidents (answer per country)

### 3.3. Optional vehicle equipments

<table>
<thead>
<tr>
<th>III-24 - What kind of equipment</th>
<th>No.</th>
<th>% obs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>adjustable suspension</td>
<td>9348</td>
<td>53.2%</td>
</tr>
<tr>
<td>daytime running lights</td>
<td>8937</td>
<td>50.9%</td>
</tr>
<tr>
<td>hazard indicator lights</td>
<td>8354</td>
<td>47.4%</td>
</tr>
<tr>
<td>luggage system</td>
<td>8316</td>
<td>47.4%</td>
</tr>
<tr>
<td>adjustable levers</td>
<td>7988</td>
<td>45.5%</td>
</tr>
<tr>
<td>on-board electronic anti-theft system</td>
<td>6047</td>
<td>34.4%</td>
</tr>
<tr>
<td>anti-lock braking system (ABS)</td>
<td>5625</td>
<td>32.0%</td>
</tr>
<tr>
<td>heated grips/heated seat</td>
<td>5289</td>
<td>30.1%</td>
</tr>
<tr>
<td>gearshift indicator</td>
<td>4808</td>
<td>27.4%</td>
</tr>
<tr>
<td>navigation system</td>
<td>4437</td>
<td>25.3%</td>
</tr>
<tr>
<td>adjustable seat height</td>
<td>3004</td>
<td>17.1%</td>
</tr>
<tr>
<td>start/stop</td>
<td>2777</td>
<td>15.8%</td>
</tr>
<tr>
<td>fuel economy assistant</td>
<td>2472</td>
<td>14.1%</td>
</tr>
<tr>
<td>integral braking system (ABS +CBS)</td>
<td>2243</td>
<td>12.8%</td>
</tr>
<tr>
<td>traction control</td>
<td>1841</td>
<td>10.5%</td>
</tr>
<tr>
<td>combined braking system (CBS)</td>
<td>1831</td>
<td>10.4%</td>
</tr>
<tr>
<td>different riding modes</td>
<td>1555</td>
<td>8.9%</td>
</tr>
<tr>
<td>tyre pressure monitoring system</td>
<td>1386</td>
<td>7.9%</td>
</tr>
<tr>
<td>anti-fog lights</td>
<td>1382</td>
<td>7.9%</td>
</tr>
<tr>
<td>nothing</td>
<td>1286</td>
<td>7.3%</td>
</tr>
<tr>
<td>adaptive headlights</td>
<td>919</td>
<td>5.2%</td>
</tr>
<tr>
<td>cruise control</td>
<td>914</td>
<td>5.2%</td>
</tr>
<tr>
<td>launch control</td>
<td>765</td>
<td>4.4%</td>
</tr>
<tr>
<td>don't know</td>
<td>189</td>
<td>1.1%</td>
</tr>
<tr>
<td>airbag</td>
<td>118</td>
<td>0.7%</td>
</tr>
<tr>
<td>Total</td>
<td>17556</td>
<td></td>
</tr>
</tbody>
</table>

Figure 38 Percentage of riders with optional vehicle equipment (EU sample)

Adjustable suspension is the most common option in Belgium, the Czech Republic, Denmark, Finland, the Netherlands, Sweden and Switzerland, and features in the top 5 options of every selected country.

Greece is the only county with anti-lock braking systems (ABS) in the top 5 of equipment options.
Launch control systems, though rare in Europe (only 4.4% of riders in our European sample has a PTW equipped with launch control), are quite common in Finland, with 35.1% of Finnish riders stating having this option.

<table>
<thead>
<tr>
<th></th>
<th>The Western Europe</th>
<th>The Northern Europe</th>
<th>Southern Europe</th>
<th>Central and Eastern Europe</th>
<th>Total for Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustable suspension</td>
<td>56.4%</td>
<td>60.9%</td>
<td>48.8%</td>
<td>55.8%</td>
<td>55.4%</td>
</tr>
<tr>
<td>Daytime running lights</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Luggage system</td>
<td>47.4%</td>
<td>59.7%</td>
<td>42.4%</td>
<td>58.5%</td>
<td>49.3%</td>
</tr>
<tr>
<td>Hazard indicator lights</td>
<td>52.7%</td>
<td>52.2%</td>
<td>45.0%</td>
<td>38.6%</td>
<td>46.3%</td>
</tr>
<tr>
<td>Adjustable levers</td>
<td>48.7%</td>
<td></td>
<td>45.5%</td>
<td>35.4%</td>
<td>42.8%</td>
</tr>
<tr>
<td>Heated grips/heated seat</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anti-lock braking system (ABS)</td>
<td>39.7%</td>
<td></td>
<td></td>
<td></td>
<td>31.1%</td>
</tr>
</tbody>
</table>

Figure 39 Top 5 vehicle equipment options in the different parts of Europe (Area of Europe)

Legend: Western Europe: Austria, Belgium, France, Germany, Luxembourg, Netherlands, Switzerland
Northern Europe: Denmark, Finland, Ireland, Iceland, Norway, Sweden, United Kingdom
Central and Eastern Europe: Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia
Southern Europe: Cyprus, Greece, Italy, Malta, Portugal, Spain

The 5th top vehicle equipment option in Northern Europe is heated grips/heated seat, with 46.0% of riders having this option fitted on their main PTW. For Southern Europe, the percentage drops to 24.5%. Such equipment is obviously climate-related and can have a strong influence on safety parameters in inclement weather conditions. (Figure 39)
3.4. **Protective equipment**

- **Personal protective equipment**

![Figure 40 Percentage of riders wearing PPE (EU dataset)](image)

The personal protective equipment most worn in Europe are helmets (regular or high-visibility), gloves, jackets (with elbow/shoulder protection or without protection), boots (motorcycle-specific boots or boots without protection), trousers (with hip/knee protection or without protection) and back protection (Figure 40).

These top 6 protective articles are the same in every selected country. However, certain specific national features need to be underlined.

There is a higher wearing rate of reflective jackets/vest/armband in the United Kingdom (36.3%), Denmark (32.4%), the Netherlands (28.6%) and Greece (27.7%), even though there is no legal requirement to wear reflective gear in any of these countries. One explanation could be that these riders feel more protected with reflective equipment. Another possible explanation could be linked to the choice of jacket materials, given that most of the clothes made of man-made fibres have reflective patches (unlike leather clothes).

Portuguese riders seem to wear less equipment than other European riders. While the wearing rate for helmets, gloves and protective jackets is higher than 90%, that of other protective equipment is significantly lower. The 4th most worn article is motorcycle boots (53.7%), followed by trousers with hip/knee protection (32.5%) (Figure 41).
The opposite trend can be observed in Sweden, where the top 6 protective articles are worn by more than 80% of riders surveyed (Figure 42).
Helmets

Full-face/integral helmets are the most used type of helmet in almost every country in our selection: Greece (71.8% against 20.4% for flip-face helmets), Spain (66.5% against 29.7%), Germany (65.6% against 27.7%), France (65.1% against 28.1%), Italy (64.1% against 26.2%), Czech Republic (63.5% against 26.7%), the United Kingdom (61.5% against 35.8%), Portugal (60.8% against 33.6%), Finland (56.6% against 28.4%), Switzerland (55.8% against 33.9%), Sweden (54.3% against 37.3%) and Norway (52.7% against 41.6%).

Flip-face/convertible helmets are the most used type of helmet in only two countries: Belgium (47.5% against 40.3% for full-face helmets) and the Netherlands (47.3% against 39.1%).

In Denmark, quite similar wearing rates can be observed: 49.3% for flip-face/convertible helmet against 47.4% for full-face/integral helmet.

It is difficult to explain the cases of Belgium, the Netherlands and Denmark, as any of the other variables (PTW type, engine size, advance training, awareness, etc.) may influence the choice of helmets.

3.5. Training and Licensing

Licensing

The normalized European dataset teaches us that the vast majority of A licence holders also own a B licence (Figure 44).
Advanced training

The European dataset also shows that only a minority of riders have undertaken post-licence training courses once or more often (Figure 45). A national comparison of the answers shows great national differences. Among the countries with at least 100 answers, Switzerland (69.5%), Austria (66.1%) and the United Kingdom (57.4%) have the highest rate of respondents who have at least participated once in voluntary advanced training. Switzerland (47.9%), Austria (43.8%) and Sweden (43.6%) also have the highest rate of respondents stating having taken advanced training more than once (Figure 46).
There is a clear geographical trend to be observed with regard to participation in voluntary advanced training, with the highest participation rates found in Western and Northern Europe. (Figure 47).
While no clear age influence could be identified amongst those stating having taken a voluntary advanced training course once, the proportion steadily increases with age for those declaring having taken such courses more than once, most likely illustrating the influence of risk awareness and/or purchasing power. 43.1% of respondents aged 55 or older have taken at least one advance training course, against 18% of our under-25 respondents (Figure 48).

Figure 48 Participation in advanced training by age (EU dataset)

Interesting to note is the proportion of female riders stating having taken advanced training courses once or more: 45.8% of female respondents had taken a post-licence training course at least once, against 33.7% of male respondents (Figure 49).
National comparisons show some interesting similarities in the profile of riders undertaking advanced training courses. Specifically comparing France, Italy and the United Kingdom, the following can be underlined:

- **France**: 31.3% are members of a national motorcyclist association, 17.8% members of a motorcycling/motoring club, 76.9% readers of motorcycle magazines
- **Italy**: 7.4% are members of a national motorcyclist association, 26.8% members of a motorcycling/motoring club, 78.0% readers of motorcycle magazines
- **United Kingdom**: 25.4% are members of a national motorcyclist association, 36.5% members of a motorcycling/motoring club, 91.1% readers of motorcycle magazines

### Participants of several voluntary advanced training (post-licence training)

<table>
<thead>
<tr>
<th></th>
<th>Number of respondent</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>175</td>
<td>7.8%</td>
</tr>
<tr>
<td>Italy</td>
<td>105</td>
<td>5%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>585</td>
<td>34.2%</td>
</tr>
</tbody>
</table>

### Professional/social activity of riders who had taken several voluntary advanced training

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>Business owner 29.4% took voluntary</td>
<td>Self-employed professional 13.9%</td>
<td>Other 12.8%</td>
</tr>
<tr>
<td></td>
<td>advanced training several time</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>Business owner 16.1%</td>
<td>Self-employed professional 6.8%</td>
<td>Small business owner 6.5%</td>
</tr>
<tr>
<td><strong>United Kingdom</strong></td>
<td>Self-employed professional 55.4%</td>
<td>Business owner 53.6%</td>
<td>Small business owner 46.1%</td>
</tr>
</tbody>
</table>

Answers show that there is a correlation between professional activity and advanced training participation. We see that among business owners or self-employed professionals there is a higher rate of riders taking advanced training courses more than once than in the overall national sample. Nevertheless, the correlation seems less distinct in Italy, where the rate of riders having taken several advanced training courses is lower than in France or the United Kingdom. (Figure 51)
<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Post-doctorate</td>
<td>Master's degree</td>
<td>Doctorate</td>
</tr>
<tr>
<td></td>
<td>16.7% of Post-doctorate riders</td>
<td>14.3%</td>
<td>10.4%</td>
</tr>
<tr>
<td></td>
<td>took voluntary advanced training</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>several time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>Doctorate</td>
<td>Primary school</td>
<td>Master's degree</td>
</tr>
<tr>
<td></td>
<td>8.8%</td>
<td>7.4%</td>
<td>7.7%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Post-doctorate</td>
<td>Master's degree</td>
<td>Doctorate</td>
</tr>
<tr>
<td></td>
<td>58.3%</td>
<td>50.6%</td>
<td>40.0%</td>
</tr>
</tbody>
</table>

Figure 52 The 3 education levels with the highest participation rate in several advanced training courses

There seems to be a correlation between a rider’s level of education and advanced training participation. We see that it is the three highest levels of education (master, doctorate and post-doctorate) that have the highest rate of riders having taken advanced training courses more than once than in the national total sample. Nevertheless, the correlation seems less distinct in Italy, where the rate of riders having taken several advanced training courses is lower than in France or the United Kingdom. (Figure 52)

🔍 Family situation of riders who had taken several voluntary advanced training courses

<table>
<thead>
<tr>
<th></th>
<th>In a relationship, with children</th>
<th>In a relationship, no children</th>
<th>In a relationship, with children</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>10.1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>of riders in a relationship, with</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>children took voluntary advanced</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>training several time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>5.6%</td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>In a relationship, with children</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>36.9%</td>
<td></td>
</tr>
</tbody>
</table>

Figure 53 Family situation of riders with the highest participation rate in several advanced training courses

There is no clear correlation between a rider’s family situation and advanced training participation. The rate of participation is more or less the same throughout the sample. The influence of having children or not seems to have no influence on any decision to undertake advanced training courses. (Figure 53)

🔍 Family (household) average gross annual income of riders who had taken several voluntary advanced training courses

|            | > 60.000€                              |                                        |                                        |
|------------|----------------------------------------|----------------------------------------|                                        |
| France     | 15.4%                                  |                                        |                                        |
|            | of riders with a income above 60.000€  |                                        |                                        |
|            | a year took voluntary advanced training|                                        |                                        |
|            | several time                           |                                        |                                        |
| Italy      |                                        | Between 50.000€ and 60.000€            |                                        |
|            |                                        | 10.8%                                  |                                        |
| United Kingdom |                                       |                                        |                                        |
|            |                                        | > 60.000€                              |                                        |
|            |                                        | 41.4%                                  |                                        |

Figure 54 Family average gross annual income of riders with the highest participation rate in several advanced training courses

There is a correlation between a rider’s level of income and advanced training participation. A
high level of income is linked with a higher participation rate than in the national overall sample. Not surprisingly, the cost of advanced training courses is a critical factor influencing riders to take such courses. (Figure 54)

Association, club membership

<table>
<thead>
<tr>
<th></th>
<th>Member of national motorcyclists association</th>
<th>Not member of national motorcyclists association</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>11.6% of riders members of national motorcyclists association took voluntary advanced training several time</td>
<td>5.5%</td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>9%</td>
<td>4.6%</td>
</tr>
<tr>
<td><strong>United Kingdom</strong></td>
<td>58.8%</td>
<td>24.7%</td>
</tr>
</tbody>
</table>

(Figure 55 Participation rate in several advanced training courses for members and non-members of a national motorcyclist association)

There is a clear correlation between membership of a national motorcyclist association and advanced training participation. The same trend can be observed between members of a motorcycling/motoring club and non-members. Associations and clubs thus play an important role in raising awareness among their members. (Figure 55)

PTW annual mileage

<table>
<thead>
<tr>
<th></th>
<th>13.6% of riders with riding more than 15,000km a year took voluntary advanced training several time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>7.8%</td>
</tr>
<tr>
<td><strong>United Kingdom</strong></td>
<td>52.8%</td>
</tr>
</tbody>
</table>

(Figure 56 PTW annual mileage and participation rate in several advanced training courses)

There is a correlation between the annual PTW mileage and advanced training participation, with those riders with the highest mileage per year having the highest participation rates. (Figure 56)

PTW usage

<table>
<thead>
<tr>
<th></th>
<th>Among the riders who took several advanced training course, the PTW is used at 41% for leisure activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Italy</strong></td>
<td>At 54% for leisure activity</td>
</tr>
<tr>
<td><strong>United Kingdom</strong></td>
<td>At 47% for leisure activity</td>
</tr>
</tbody>
</table>

(Figure 57 Most important PTW usage by riders having participated in several advanced training courses)

There is a correlation between the type of PTW usage and advanced training participation. Riders having taken several advanced training courses tended to use their PTWs mainly for leisure and hobby. This in turn correlated to engine size (cf. Vehicle data detailed in Deliverable 2). (Figure 57)

No correlation could be found between the safety attitude “Motorcycling will never be made risk-free” and advance training course participation. In France, the highest participation
rate can be found among riders who totally agreed with the statement, while this rate applies to riders who totally disagreed with it in the United Kingdom.

**Safety Information sources**

![Safety Information sources](image)

Figure 58 What are your safety information sources? Answer ranked as most important (EU sample)

Advanced training is the top answer in Belgium, the Czech Republic, Denmark, Greece, Norway, Portugal, Switzerland and the United Kingdom.

Advanced training, licence training and education in driving schools are well rated when it comes to rider information. It seems that advanced training courses are the most important source of safety information, confirming the benefits of such training for enhancing motorcycle safety. (Figure 58)

Safety awareness and attitudes: In Italy, only 10% of riders considering themselves as experts in motorcycle safety had taken advanced training courses several times. Comparable percentages were 27.4% in France and 72.1% in the United Kingdom. Therefore, it is difficult to see any link between the (perceived) level of expertise in motorcycle safety and participation in advanced training. In the United Kingdom there is clearly a link and we can suppose that riders who have taken advanced training courses acquire a certain level of expertise; however, in Italy, 77.7% of riders considering themselves as experts in motorcycle safety have never taken any advanced training course and thus acquire their expertise otherwise.

The national sample analysis shows that for riders in France, Italy and the United Kingdom
who have taken at least one advanced training course, the most important source of information on motorcycle safety is such a course. In France, the most important source for riders who have never taken any advance training is motorcycle dealers (89.2%), while in Italy it is the license training before the motorcycle license (86.1%), and friends or family in the United Kingdom (63.5%).

In Finland, the most important source of information is motorcycling friends (27.6% against 17.9% for advanced training).

In France, the national motorcyclist organization (36.5%), motorcycling friends (28.6%), articles in motorcycle magazines (28.3%) and rider education in driving schools (23.2%) came before advanced training (23.0%).

Articles in motorcycle magazine are a more important source of information than advanced training in Germany (33.9% against 31.8% for advanced training) and Italy (37.9% against 28.1%). 79.6% of German respondents are readers of motorcycle magazines, as are 78% of Italian respondents.

National motorcyclist organizations are considered as a more important source of information than advanced training in the Netherlands (35.5% against 32.0%), Spain (29.9% against 26.8%) and Sweden (31.6% against 30.1%). 62.6% of Dutch respondents are members of a national motorcyclist association, 54.3% of Spanish ones and 88.1% of Swedish ones.

3.6. Infrastructure

- Infrastructure problems

![Figure 59 Main infrastructure problems faced by motorcyclists (EU sample)](image-url)
Figure 60 Main infrastructure problems faced by motorcyclists (Area of Europe)

<table>
<thead>
<tr>
<th></th>
<th>Road maintenance</th>
<th>Road surface</th>
<th>Road markings</th>
<th>Road signs, roadside equipment, urban furniture</th>
<th>Road structure and design</th>
<th>Hazard signaling</th>
<th>Road works</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>85.0%</td>
<td>69.0%</td>
<td>22.1%</td>
<td>16.8%</td>
<td>16.8%</td>
<td>5.3%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Belgium</td>
<td>83.4%</td>
<td>83.4%</td>
<td>22.1%</td>
<td>28.5%</td>
<td>20.3%</td>
<td>14.2%</td>
<td>13.6%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>86.1%</td>
<td>82.7%</td>
<td>30.6%</td>
<td>11.5%</td>
<td>22.5%</td>
<td>10.3%</td>
<td>9.4%</td>
</tr>
<tr>
<td>Denmark</td>
<td>78.1%</td>
<td>53.8%</td>
<td>15.4%</td>
<td>3.4%</td>
<td>18.0%</td>
<td>2.8%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Finland</td>
<td>93.1%</td>
<td>54.2%</td>
<td>9.5%</td>
<td>6.1%</td>
<td>9.1%</td>
<td>1.6%</td>
<td>7.1%</td>
</tr>
<tr>
<td>France</td>
<td>82.6%</td>
<td>85.0%</td>
<td>59.2%</td>
<td>33.5%</td>
<td>23.1%</td>
<td>17.3%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Germany</td>
<td>90.9%</td>
<td>73.5%</td>
<td>16.7%</td>
<td>17.6%</td>
<td>13.0%</td>
<td>8.7%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Greece</td>
<td>90.8%</td>
<td>76.8%</td>
<td>19.0%</td>
<td>33.7%</td>
<td>58.4%</td>
<td>39.2%</td>
<td>30.2%</td>
</tr>
<tr>
<td>Italy</td>
<td>92.4%</td>
<td>86.0%</td>
<td>46.7%</td>
<td>39.4%</td>
<td>11.3%</td>
<td>21.5%</td>
<td>15.3%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>69.9%</td>
<td>67.6%</td>
<td>40.9%</td>
<td>23.2%</td>
<td>16.6%</td>
<td>5.4%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Norway</td>
<td>66.0%</td>
<td>71.7%</td>
<td>11.2%</td>
<td>6.1%</td>
<td>34.0%</td>
<td>16.3%</td>
<td>14.4%</td>
</tr>
<tr>
<td>Poland</td>
<td>88.5%</td>
<td>87.2%</td>
<td>49.3%</td>
<td>14.2%</td>
<td>31.1%</td>
<td>4.7%</td>
<td>23.0%</td>
</tr>
<tr>
<td>Portugal</td>
<td>88.9%</td>
<td>77.6%</td>
<td>47.6%</td>
<td>21.9%</td>
<td>27.7%</td>
<td>29.2%</td>
<td>21.4%</td>
</tr>
<tr>
<td>Spain</td>
<td>92.2%</td>
<td>81.3%</td>
<td>56.7%</td>
<td>43.3%</td>
<td>26.8%</td>
<td>27.2%</td>
<td>12.7%</td>
</tr>
</tbody>
</table>
With the exception of France and Norway, all countries’ infrastructure priority is *road maintenance* (i.e. potholes, asphalt seals, etc.) (Figure 61 and Figure 62).

*Road surface* (pavement, rutting, manholes, slab joints, tram tracks, skid resistance) was always the second most important issue for riders, except for France and Norway were this issue came in front of *road maintenance*.

A less problematic issue appears to be *roadworks*, especially for Austria (only 0.9% of the respondents selected *roadworks* as one of the main infrastructure problems), Denmark (2.5%), Netherlands (4.2%) and Switzerland (4.8%). By contrast, in Greece and Poland *roadworks* were selected by 30.2% and 23.0% respectively of riders as one of the main infrastructure problems.

---

<table>
<thead>
<tr>
<th>Country</th>
<th>Answer per country n=100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>86.2% 46.1% 5.2% 34.9% 13.0% 7.2% 6.8%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>76.4% 74.6% 30.4% 21.2% 14.0% 5.1% 4.8%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>89.6% 72.5% 20.7% 16.4% 11.0% 6.9% 6.1%</td>
</tr>
</tbody>
</table>

Figure 61 Main infrastructure problems faced by motorcyclists (Answer per country n≥100)
problems for riders.

Some specific national features:

- in Denmark, unlike the rest of Europe, 3 issues were chosen by less than 4% of the riders as main infrastructure problems for PTWs: *Road signs, roadside equipment, urban furniture* (3.4% in Denmark against the European average of 28.8%), *hazard signalling* (3.4% in Denmark against 17.3% in Europe) and *roadworks* (3.4% in Denmark against in Europe 13.5%);

- only 1.6% of Finnish riders choose *hazard signalling* as an important infrastructure issue for riders, while the average for Europe is 17.3%.

- the issue of *road markings* is a particular problem in France (59.2% of riders) and Spain (56.7%);

- *Road signs, roadside equipment, urban furniture* is a one of the main problems in Italy for 39.4% of riders and in Spain for 43.3% of them;

- 58.4% of Greek riders and 34.0% of Norwegian riders selected *road structure and design* as one of the main infrastructure problems faced by PTW users;

- *Hazard signalling* is a problem in Greece (39.2%) and Portugal (29.2%);

- Greece seems to have the greatest problems with infrastructure, with 6 out of 7 issues getting more than 30% of the riders’ votes. Only *road markings* scored less (19%), while these seem to be a problem for the rest of European riders (38.7% - EU sample).

- **Infrastructure and accidents**

  ![Figure 63 Accident type (all accidents merged) (EU sample)](image_url)

  To be noted: respondents were allowed to tick more than one answer (for example “tilting standing still” is considered as a single accident; therefore, both cases could be ticked without being inconsistent).

The highest rate of collisions with road infrastructure can be found in Finland (19.3%), Spain (12.3%) and Belgium (11.8%). In Denmark, of the 36 accidents declared, none involved a collision with road infrastructure.
Infrastructure issues are particularly striking in Greece, Spain, Belgium, Italy and France, where infrastructure problems were behind more than 30% of the near-miss accidents experienced by our respondents.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greece</td>
<td>40.9%</td>
</tr>
<tr>
<td>Spain</td>
<td>38.6%</td>
</tr>
<tr>
<td>Belgium</td>
<td>37.7%</td>
</tr>
<tr>
<td>Italy</td>
<td>36.9%</td>
</tr>
<tr>
<td>France</td>
<td>36.5%</td>
</tr>
<tr>
<td>Finland</td>
<td>28.4%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>21.5%</td>
</tr>
<tr>
<td>Sweden</td>
<td>18.3%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>17.6%</td>
</tr>
<tr>
<td>Portugal</td>
<td>15.7%</td>
</tr>
<tr>
<td>Germany</td>
<td>13.8%</td>
</tr>
<tr>
<td>Norway</td>
<td>12.9%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>11.7%</td>
</tr>
<tr>
<td>UK</td>
<td>8.9%</td>
</tr>
<tr>
<td>Denmark</td>
<td>6.2%</td>
</tr>
</tbody>
</table>

3.7. Safety attitude

- Motorcycling and risk
The vast majority of EU riders tend to agree that risk will remain an inherent element of riding a PTW, and that riding a PTW will always be more dangerous than driving a car (Figure 66 and Figure 67). The statement “Motorcycling will never be made risk-free” gains a large consensus throughout Europe, with at least 70% of the riders in each selected country totally or partially agreeing with it. We find the highest level of agreement (totally and partially combined) in the Netherlands (96.5%) and the lower level in Greece (77%). Riders totally agreeing with the statement were to be found most in Sweden (77.3%) and again the fewest in Greece (39.7%) (Figure 67).
Here again, the statement “Riding a motorcycle involves taking a higher risk than driving a car” was unanimously accepted in Europe (80.6%) (Figure 68) with at least a 60% level of agreement (totally or partially combined) in every selected country. The highest level of agreement was found in Germany (91.8%) and the lowest level in France (61.1%).

- **Motorcycle safety**

The statement “Riding is not more dangerous than other modes of transportation, it is mainly about the right attitude and behaviour, and everyone sharing the road properly” was chosen by the majority of the riders in all surveyed countries (Figure 70).

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>78.9%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>68.1%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>67.7%</td>
</tr>
<tr>
<td>Sweden</td>
<td>65.4%</td>
</tr>
<tr>
<td>Portugal</td>
<td>63.9%</td>
</tr>
<tr>
<td>Norway</td>
<td>61.7%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>60.3%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>56.6%</td>
</tr>
</tbody>
</table>
At least 50% of respondents considered that this sentence best defined motorcycle safety in Finland, the Czech Republic, the United Kingdom, Sweden, Portugal, Norway, the Netherlands, Switzerland, Italy and Germany. (Figure 70)

France was the country least in agreement with this statement, with just 40.2% of respondents choosing this answer. The second statement preferred by French riders is “To make motorcycling safer, it is the job of road authorities to improve riding conditions (road infrastructure, tax cuts on motorcycling protective equipment, etc…)”, chosen by 25.1% of French respondents (Figure 71).

<table>
<thead>
<tr>
<th>Country</th>
<th>Riding is not more dangerous than other modes of transportation</th>
<th>To make motorcycling safer, it is the job of road authorities to improve riding conditions</th>
<th>Motorcycling is dangerous and one should be extremely well trained before getting on the road with a bike</th>
<th>Motorcycle safety, it’s all about car drivers’ training and awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finland</td>
<td>78.9%</td>
<td>6.1%</td>
<td>11.5%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>68.1%</td>
<td>11.9%</td>
<td>17.2%</td>
<td>2.8%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>67.7%</td>
<td>6.3%</td>
<td>17.7%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Sweden</td>
<td>65.4%</td>
<td>4.3%</td>
<td>27.2%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Portugal</td>
<td>63.9%</td>
<td>8.1%</td>
<td>16.3%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Norway</td>
<td>61.7%</td>
<td>3.8%</td>
<td>30.1%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>60.3%</td>
<td>8.6%</td>
<td>14.4%</td>
<td>16.7%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>56.6%</td>
<td>16.2%</td>
<td>21.0%</td>
<td>6.3%</td>
</tr>
<tr>
<td>Italy</td>
<td>51.2%</td>
<td>13.2%</td>
<td>32.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Germany</td>
<td>50%</td>
<td>19.2%</td>
<td>26.3%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Greece</td>
<td>48.2%</td>
<td>26.0%</td>
<td>22.0%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Spain</td>
<td>47.8%</td>
<td>13.4%</td>
<td>23.3%</td>
<td>15.5%</td>
</tr>
<tr>
<td>Belgium</td>
<td>44.5%</td>
<td>27.1%</td>
<td>15.8%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Denmark</td>
<td>43.9%</td>
<td>4.9%</td>
<td>26.4%</td>
<td>24.8%</td>
</tr>
<tr>
<td>France</td>
<td>40.2%</td>
<td>25.1%</td>
<td>22.6%</td>
<td>22.6%</td>
</tr>
</tbody>
</table>

While the first statement chosen to best define motorcycle safety was the same in all surveyed
countries, the second most chosen answer varied (Figure 72). To enhance motorcycle safety, 3 solutions can be considered:

- Road authorities’ responsibility: improving riding conditions: Belgium, Greece and France.
- Motorcyclists’ responsibility: improving training: Italy, Norway, Sweden, Denmark, Germany, Spain, Switzerland, the United Kingdom, the Czech Republic and Finland.
- Other road users’ responsibility: car driver training and awareness: the Netherlands, Portugal.

![Second most chosen answer per country to the question "Which sentence best defines motorcycle safety?" (national rates)](image)

- Technology attitudes

![Attitude towards new technologies (EU dataset)](image)

Figure 72 Second most chosen answer per country to the question "Which sentence best defines motorcycle safety?" (national rates)

Figure 73 Attitude towards new technologies (EU dataset)
The sentence “New technologies enable road use to be safer, greener and less congested. This is the solution to an ever-growing traffic demand” was selected as the statement best defining new technologies in the Czech Republic, Denmark, Finland, Germany, Greece, Italy, Norway, Portugal, Spain, Sweden and Switzerland. This statement was chosen by at least 50% of respondents in Spain (with the highest rate: 75.7%), Portugal, Greece, Czech Republic, Sweden, Norway and Italy (50.9%). In Germany, Finland, Denmark and Switzerland, between 44.5% (Germany) and 40.5% (Switzerland) of riders agreed with this statement (Figure 74).

Riders from France, the Netherlands, Belgium and the United Kingdom were less enthusiastic about new technologies, with the top answer for these countries being “Accidents happen because drivers are more and more distracted at the wheel by technology”: 63.7% for France, 55.6% for the Netherlands, 51.4% for Belgium and 47.3% for the United Kingdom. (Figure 74)
3.8. Safety campaigns

![Table showing breakdown of answers on riders' perceptions of official road safety campaigns in Europe (EU dataset)](image)

Figure 75 Breakdown of answers on riders’ perceptions of official road safety campaigns in Europe (EU dataset)

<table>
<thead>
<tr>
<th>Country</th>
<th>Public road safety campaigns address the right issues and use language and images drivers and riders understand</th>
<th>Public road safety Campaigns address the right issues, but language and images are difficult to understand, inappropriate or offensive</th>
<th>Public road safety campaigns give a bad image of motorcyclists and motorcycling</th>
<th>Public road safety campaigns send the wrong messages</th>
<th>I am not aware of public road safety campaigns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>14.4%</td>
<td></td>
<td></td>
<td></td>
<td>34.2%</td>
</tr>
<tr>
<td>Belgium</td>
<td>34.8%</td>
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<td></td>
</tr>
<tr>
<td>Czech Republic</td>
<td>44.5%</td>
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<tr>
<td>Finland</td>
<td>25.2%</td>
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<td></td>
<td></td>
<td>30.4%</td>
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<tr>
<td>France</td>
<td>37.8%</td>
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<td></td>
<td></td>
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<tr>
<td>Germany</td>
<td>31.1%</td>
<td></td>
<td></td>
<td></td>
<td>31.7%</td>
</tr>
<tr>
<td>Greece</td>
<td>24.5%</td>
<td></td>
<td></td>
<td></td>
<td>36.0%</td>
</tr>
<tr>
<td>Italy</td>
<td>32.3%</td>
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<td></td>
<td></td>
<td>32.2%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>25.3%</td>
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<tr>
<td>Norway</td>
<td>27.3%</td>
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<td></td>
<td></td>
<td>26.7%</td>
</tr>
<tr>
<td>Poland</td>
<td>26.0%</td>
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<tr>
<td>Portugal</td>
<td>16.8%</td>
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<td></td>
<td>46.0%</td>
</tr>
<tr>
<td>Spain</td>
<td>28.1%</td>
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<tr>
<td>Sweden</td>
<td>28.5%</td>
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<td></td>
<td></td>
<td>34.6%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>38.4%</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td>36.2%</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Figure 76 Top answers per country % perception of official road safety campaigns (answers per country)

Answers to the question “Which sentence best defines your perception of official road safety campaigns” vary greatly from country to country (Figure 76) without any correlation with membership or readership rates (Figure 6 and Figure 7). This means that
riders’ perceptions of an official road safety campaign are directly influenced by his/her own personal assessment of the quality of the road safety campaign.

Riders from Belgium, the Czech Republic, the Netherlands, Poland and the United Kingdom have a good perception of the awareness campaigns conducted by their national authorities, as seen by the top selected answer “Public road safety campaigns address the right issues and use language and images drivers and riders understand” (Figure 76).

For France, Italy, Spain and Switzerland, riders seem to think that official awareness campaigns can be offensive and put over a negative image of motorcycling and motorcyclists (Figure 76).

In Austria, Finland, Germany, Greece, Norway, Portugal and Sweden, the top answer chosen by riders is “I am not aware of public road safety campaigns”. Amplifying questions directed at Member States and EU Road Safety Authorities (Annex 4) and the motorcycling community (Annex 5) confirmed that public authorities do not conduct any campaigns in Greece, Norway and Sweden, and that they are very rare in Austria. In Germany this result is quite surprising, given the various campaigns launched by public authorities such as Runter vom Gas (Figure 76).

In Austria, Finland and Greece, the second most frequent answer is “Public road safety campaigns do not address the right issue”. In Germany, Norway, Portugal and Sweden the second most frequent answer is “Public road safety campaigns give a bad image of motorcyclists and motorcycling”. This means that, even when there is no public awareness campaign in their country, riders there tend to have a negative image of official road safety campaigns (Figure 76).
4. Appendixes

4.1. Questionnaire

The RIDERSCAN project is an EU co-funded project aiming at gathering the existing knowledge in 8 motorcycle safety related areas, in order to identify missing knowledge and information and provide guidance to road authorities on how to improve motorcycle safety.

This RIDERSCAN survey aims at collecting information about the motorcycling community around Europe in order to have a better overview of similarities and differences in terms of riding and attitudes, and better identify the safety needs of the motorcycling community.

The survey is of course anonymous and the privacy of all submitted data is guaranteed. At the end of the survey, you will be given the opportunity to further collaborate with FEMA and Mutuelle des Motards (the French Motorcycle Mutualized Insurer) by providing your contact details.

The questionnaire is structured into 5 parts (40 questions) surveying the following:
1. General information about you
2. Your mobility habits
3. Your riding habits
4. Your safety habits
5. Your safety views and attitudes

Answering all questions will take approximately 10-15 minutes to answer in a row.

NOTES:
- If you would like the questionnaire in another language other than the ones available, please use google chrome as your web browser and use the translate function;
- For technical reasons, it is highly recommended not to leave the page open for more than twenty minutes without answering, as you might have to start the entire questionnaire again;
- you can save your questionnaire and upload it later, provided you use the buttons at the bottom of the page (not those from your web browser)

If you have questions or are facing problems answering the questionnaire, please contact the survey administrator: survey@riderscan.eu

THANK YOU FOR YOUR TIME IN ANSWERING THIS QUESTIONNNAIRE

FEMA & THE RIDERSCAN TEAM

There are 109 questions in this survey

I. General information - Page 1
This part of the survey aims at segmenting motorcyclists per country according to socio-
economic basic information.

1 Gender
Please choose only one of the following:

○ Male
○ Female

2 Year of birth
Please choose only one of the following:

○ 2012  ○ 1988  ○ 1964
○ 2011  ○ 1987  ○ 1963
○ 2010  ○ 1986  ○ 1962
○ 2009  ○ 1985  ○ 1961
○ 2008  ○ 1984  ○ 1960
○ 2007  ○ 1983  ○ 1959
○ 2006  ○ 1982  ○ 1958
○ 2005  ○ 1981  ○ 1957
○ 2004  ○ 1980  ○ 1956
○ 2003  ○ 1979  ○ 1955
○ 2002  ○ 1978  ○ 1954
○ 2001  ○ 1977  ○ 1953
○ 2000  ○ 1976  ○ 1952
○ 1999  ○ 1975  ○ 1951
○ 1998  ○ 1974  ○ 1950
○ 1997  ○ 1973  ○ 1949
○ 1996  ○ 1972  ○ 1948
○ 1995  ○ 1971  ○ 1947
○ 1994  ○ 1970  ○ 1946
○ 1993  ○ 1969  ○ 1945
○ 1992  ○ 1968  ○ 1944
○ 1991  ○ 1967  ○ 1943
○ 1990  ○ 1966  ○ 1942
○ 1989  ○ 1965  ○ 1941
3 City
Please write your answer here: ..........................

4 Country *
Please choose only one of the following:

○ Austria    ○ Germany       ○ Norway
○ Belgium    ○ Greece        ○ Poland
○ Bulgaria    ○ Hungary       ○ Portugal
○ Croatia    ○ Ireland        ○ Romania
○ Cyprus    ○ Italy          ○ Slovakia
○ Czech Republic    ○ Latvia       ○ Slovenia
○ Denmark    ○ Lithuania      ○ Spain
○ Estonia    ○ Luxembourg     ○ Sweden
○ Finland    ○ Malta          ○ Switzerland
○ France    ○ Netherlands    ○ United Kingdom

5 Mother Tongue
Please choose only one of the following:

○ Bg - български    ○ Es - español
6 e-mail (optional)
Please write your answer here: ..............................

I. General information - Page 2

7 Professional/social activity
Please choose only one of the following:

- Farmer
- Small business owner (<10 employees)
- Business owner (>10 employees)
- Self-employed professional (architect, medical doctor, nurse, lawyer...)
- Employee
- Factory worker
- Pensioner
- Student
- Job seeker
- Other
- No professional activity (parent at home, etc.)

8 Your education
Please choose all that apply:

- Primary school
- Secondary school
- Technical degree
- Licence/Bachelor (University)
- Master's degree (University)
- Doctorate
- Post-doctorate
- Engineer
- None

9 What is your family situation (household)?
Please choose only one of the following:

- Single, no children
- Single with children → Age of the child(ren)
- In a relationship, no children
In a relationship, with children → Age of the child(ren)

Other (specify)

11 Family (household) average gross yearly income
Please choose only one of the following:

○ < 10.000€/£8.000
○ Between 10.000€ and 20.000€/£8.000 and £16.000
○ Between 20.000€ and 30.000€/£16.000 and £24.000
○ Between 30.000€ and 40.000€/£24.000 and £32.000
○ Between 40.000€ and 50.000€/£32.000 and £40.000
○ Between 50.000€ and 60.000€/£40.000 and £48.000
○ > 60.000€/£48.000

I. General information - Page 3

12 Do you work for the motorcycle sector?
Please choose only one of the following:

○ Yes
○ No

13 Do you have a driving licence?
Please choose only one of the following:

○ Yes
○ No

14 Which category of vehicle does your driving licence allow you to operate?
Répondre à cette question seulement si les conditions suivantes sont réunies :
Please choose all that apply:

☐ AM ☐ B ☐ BE
☐ A1 ☐ C1 ☐ C1E
☐ A2 ☐ C ☐ CE
☐ A ☐ D1 ☐ D1E
☐ B1 ☐ D ☐ DE

15 Year of issuing (of your first licence)
Please choose only one of the following:

○ 2013 ○ 2012 ○ 2011
16 Are you a member of a national motorcyclists association?
Please choose only one of the following:

- ○ No, I am not.
- ○ Belgium Motorcycle Action Group
- ○ Czech Republic Motocyclová Asociace
- ○ Czech Republic UAMK
- ○ Denmark Danske Motorcyklisters Råd
- ○ Denmark MC Touring Club
- ○ Finland Moottoripyöräkerho 69
- ○ Finland Suomen Motoristit
17 Are you a member of a motorcycling/Motoring club?
Please choose only one of the following:

- Yes
- No

18 Which one(s)?
Please write your answer here: ...........................................

19 Do you read motorcycle magazines?
Please choose only one of the following:

- Yes
- No

20 Which one(s)?

21 Name (Magazine 1)
Please write your answer here: ...........................................

22 Name (Magazine 2)
Please write your answer here: ...........................................

23 Name (Magazine 3)
Please write your answer here: ...........................................

24 Name (Magazine 4)
Please write your answer here: ……………………………………….

25 Name (Magazine 5)
Please write your answer here: ……………………………………….

26 Frequency

Please choose the appropriate response for each item:

<table>
<thead>
<tr>
<th></th>
<th>Sometimes</th>
<th>Regularly</th>
<th>Every issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magazine 1</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Magazine 2</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Magazine 3</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Magazine 4</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Magazine 5</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

II. Mobility habits - Page 4

This part of the survey aims at understanding what kind of journeys you make in general and more specifically with your powered two-wheelers.

27 How many powered two-wheeler vehicles do you own?
Please choose only one of the following:

☐ None
☐ 1
☐ 2
☐ 3
☐ More than 3

28 Please provide information about your vehicle(s). If you own several powered two-wheeler vehicles, first describe the one(s) you use the most.
Use the following bike types for the corresponding answer.

Custom
Electric
Enduro/Cross
On/offroad
Scooter
Sport Touring
29 Vehicle 1

30 Brand
Please choose only one of the following:

- ADLY
- AEON
- AJS
- AMS
- APEX
- APRILIA
- BAOTIAN
- BAROSSA
- BASHAN
- BENELLI
- BETA
- BETTER
- BMW
- BORILE
- BSA
- CAGIVA
- CCM
- CEZETA
- CHITUMA
- CHUNLAN
- CPI
- CZ
- DAEVILIM
- DAJING
- DERBI
- DINLI
- DIRT PRO
- DUCATI
- EASY RIDER
- EXPRESS
- FEIYING
- FYM
- GAS GAS
- GIANTCO
- GILERA
- HAIZHIMENG
- HAOTIAN
- HARLEY
- DAVIDSON
- HARTFORD
- HONDA
- HONGDOU
- HONGYI
- HUSABERG FSE
- HUSKY
- HUSQVARNA
- HYOSUNG
- ITALJET
- JIALING
- JINLUN
- KANGDA
- KAWASAKI
- KEEWAY
- KINROAD
- KTM
- KYMCO
- LAMBRETTA
- LIFAN HONGDA
- LONCIN
31 Model
Please write your answer here: .................................

32 Engine size
Please choose only one of the following:

- Below 125cm³
- 125-400 cm³
- 401-700 cm³
- 701-1000 cm³
- Above 1000 cm³

33 Type of vehicle
Please choose only one of the following:
☐ Custom  ☐ Standard  
☐ Electric  ☐ Supermotard  
☐ Enduro/Cross  ☐ Supersport  
☐ On/off road  ☐ Touring  
☐ Scooter  ☐ Trial  
☐ Sport Touring

**34 Year of first registration**
Please choose only one of the following:

☐ 2013  ☐ 1991  ☐ 1969  
☐ 2012  ☐ 1990  ☐ 1968  
☐ 2011  ☐ 1989  ☐ 1967  
☐ 2010  ☐ 1988  ☐ 1966  
☐ 2009  ☐ 1987  ☐ 1965  
☐ 2008  ☐ 1986  ☐ 1964  
☐ 2007  ☐ 1985  ☐ 1963  
☐ 2006  ☐ 1984  ☐ 1962  
☐ 2005  ☐ 1983  ☐ 1961  
☐ 2004  ☐ 1982  ☐ 1960  
☐ 2003  ☐ 1981  ☐ 1959  
☐ 2002  ☐ 1980  ☐ 1958  
☐ 2001  ☐ 1979  ☐ 1957  
☐ 2000  ☐ 1978  ☐ 1956  
☐ 1999  ☐ 1977  ☐ 1955  
☐ 1997  ☐ 1975  ☐ 1953  
☐ 1996  ☐ 1974  ☐ 1952  
☐ 1995  ☐ 1973  ☐ 1951  
☐ 1994  ☐ 1972  ☐ 1950  
☐ 1993  ☐ 1971  ☐ 1949  
☐ 1992  ☐ 1970  ☐ 1948
35 Is the vehicle used by other family members?
Please choose only one of the following:

- Oui
- Non

36 Add another vehicle?
Please choose only one of the following:

- Oui
- Non

37 Vehicle 2

38 Brand
Please choose only one of the following:

- ADLY
- APEX
- BASHAN
- AEON
- APRILIA
- BENELLI
- AJS
- BAOTIAN
- BETA
- AMS
- BAROSSA
39 Model
Please write your answer here: ____________________________

40 Engine size
Please choose only one of the following:

- Below 125 cm³
- 125-400 cm³
- 401-700 cm³
- 701-1000 cm³
- Above 1000 cm³

41 Type of vehicle
Please choose only one of the following:

- Custom
- Electric
- Enduro/Cross
- On/off road
- Scooter
- Sport Touring
- Standard
- Supermotard
- Supersport
- Touring
- Trial

42 Year of first registration
Please choose only one of the following:

- 2013
- 2012
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003
- 2002
- 2001
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- 1999
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43 Is the vehicle used by other family members?
Please choose only one of the following:
○ Oui
○ Non

44 Add another vehicle?
Please choose only one of the following:
○ Oui
○ Non

45 Vehicle 3

46 Brand
Please choose only one of the following:
○ ADLY
○ AEON
○ AJS
○ AMS
○ APEX
○ APRILIA
○ BAOTIAN
○ BAROSSA
○ BASHAN
○ BENELLI
○ BETA
○ BETTER
○ BMW
○ BORILE
○ BSA
○ CAGIVA
○ CCM
○ CEZETA
○ CHITUMA
○ CHUNLAN
○ CPI
○ CZ
○ DAEILIM
○ DAJING
○ DERBI
○ DINLI
○ DIRT PRO
○ DUCATI
○ EASY RIDER
○ EXPRESS
○ FEIYING
○ FYM
○ GAS GAS
○ GIANTCO
○ GILERA
○ HAIZHIMENG
○ HAOTIAN
○ HARLEY
○ DAVIDSON
○ HARTFORD
○ HONDA
○ HONGDOU
○ HONGYI
○ HUSABERG FSE
○ HUSKY
○ HUSQVARNA
○ HYOSUNG
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**47 Model**  
Please write your answer here: ...........................................

**48 Engine size**  
Please choose only one of the following:

- ○ Below 125cm³
- ○ 125-400 cm³
- ○ 401-700 cm³
- ○ 701-1000 cm³
- ○ Above 1000 cm³

68
49 Type of vehicle
Please choose only one of the following:

☐ Custom
☐ Electric
☐ Enduro/Cross
☐ On/off road
☐ Scooter
☐ Sport Touring
☐ Standard
☐ Supermotard
☐ Supersport
☐ Touring
☐ Trial

50 Year of first registration
Please choose only one of the following:

☐ 2013
☐ 2012
☐ 2011
☐ 2010
☐ 2009
☐ 2008
☐ 2007
☐ 2006
☐ 2005
☐ 2004
☐ 2003
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51 Is the vehicle used by other family members?  
Please choose only one of the following:  
- Oui  
- Non

52 Add another vehicle?  
Please choose only one of the following:  
- Oui  
- Non

53 Vehicle 4

54 Brand  
Please choose only one of the following:  
- ADLY  
- AMS  
- BAOTIAN  
- AEON  
- APEX  
- BAROSSA  
- AJS  
- APRILIA
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55 Model
Please write your answer here: ……………………………

56 Engine size
Please choose only one of the following:

- Below 125cm³
- 125-400 cm³
- 401-700 cm³
- 701-1000 cm³
- Above 1000 cm³

57 Type of vehicle
Please choose only one of the following:

- Custom
- Electric
- Enduro/Cross
- On/off road
- Scooter
- Sport Touring
- Standard
- Supermotard
- Supersport
- Touring
- Trial

58 Year of first registration
Please choose only one of the following:

- 2013
- 2012
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003
- 2002
- 2001
- 2000
- 1999
59 Is the vehicle used by other family members?
Please choose only one of the following:
- Oui
- Non

60 Add another vehicle?
Please choose only one of the following:
- Oui
- Non

61 Vehicle 5

62 Brand
Please choose only one of the following:
- ADLY
- CEZETA
- GILERA
- AEON
- CHITUMA
- HAIZHIMENG
- AJS
- CHUNLAN
- HAOTIAN
- AMS
- CPI
- HARLEY
- APEX
- CZ
- DAVIDSON
- APRILIA
- DAELIM
- HARTFORD
- BAOTIAN
- DAJIANG
- HONDA
- BAROSSA
- DERBI
- HONGDAN
- BASHAN
- DINLI
- HONGYI
- BENELLI
- DIRT PRO
- HUSABERG FSE
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- DUCATI
- HUSKY
- BETTER
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- BMW
- EXPRESS
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**63 Model**
Please write your answer here: .................................

**64 Engine size**
Please choose only one of the following:

- [ ] Below 125cm³
- [ ] 125-400 cm³
- [ ] 401-700 cm³
- [ ] 701-1000 cm³
☐ Above 1000 cm³

65 **Type of vehicle**
Please choose only one of the following:

☐ Custom
☐ Electric
☐ Enduro/Cross
☐ On/off road
☐ Scooter
☐ Sport Touring

☐ Standard
☐ Supermotard
☐ Supersport
☐ Touring
☐ Trial

66 **Year of first registration**
Please choose only one of the following:

☐ 2013
☐ 2012
☐ 2011
☐ 2010
☐ 2009
☐ 2008
☐ 2007
☐ 2006
☐ 2005
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☐ 1967
☐ 1966
☐ 1965
☐ 1964
☐ 1963
☐ 1962
☐ 1961
☐ 1960
☐ 1959
☐ 1958
☐ 1957
67 Is the vehicle used by other family members?
Please choose only one of the following:

☐ Oui

☐ Non

68 Do you own another vehicle (not a powered two-wheeler)?
Please choose only one of the following:

☐ Oui

☐ Non

69 If yes, specify.
Please write your answer here: .............................................

70 Which transport means do you use most often?
Total must reach 100%.
III. Riding habits - Page 5

This part of the survey aims at having more details about your riding habits.

72 How many km/miles do you drive (in your car) approximately per year?  
Please choose only one of the following:

- Less than 1000km/600mi
- 1000 to 3000km/601 to 1800mi
- 3001 to 5000km/1801 to 3000mi
- 5001 to 7000km/3001 to 4500mi
- 7001 to 10000km/4501 to 6000mi
- 10001 to 15000km/6001 to 10000mi
- More than 15000km/10000mi

73 How many km/miles do you ride (on your bike) approximately per year?  
Please choose only one of the following:

- Less than 1000km/600mi
- 1000 to 3000km/601 to 1800mi
- 3001 to 5000km/1801 to 3000mi
- 5001 to 7000km/3001 to 4500mi
- 7001 to 10000km/4501 to 6000mi
- 10001 to 15000km/6001 to 10000mi
- More than 15000km/10000mi

74 Use of your powered two-wheelers?  
Total must reach 100%.
75 If other, specify.
Please write your answer here: ............................................

76 How often do you ride?
Please choose only one of the following:

- everyday
- during the summer season
- a few times a week
- a few times a month
- a few times a year
- never

III. Riding habits - Page 6

77 Do you ride most of the time...
Please choose only one of the following:

- alone
- with a pillion passenger / as a passenger
- with another motorcyclist
- with a few others motorcyclists (< 10)
- with many other motorcyclists (groups/clubs/organized rides >10)

78 Do you ride...
  a) when it rains
  Please choose only one of the following:

  - Yes, no problem
  - Yes, when I have no choice
  - No, I try to avoid it

79 b) during nighttime
Please choose only one of the following:
☐ Yes, no problem
☐ Yes, when I have no choice
☐ No, I try to avoid it

80 c) under winter conditions
Please choose only one of the following:
☐ Yes, no problem
☐ Yes, when I have no choice
☐ No, I try to avoid it

81 What kind of equipment (safety/mobility/comfort) is your main powered two-wheeler vehicle equipped with?
Please choose all that apply:
☐ anti-lock braking system (ABS)
☐ combined braking system (CBS)
☐ integral braking system (ABS +CBS)
☐ traction control
☐ launch control
☐ navigation system
☐ heated grips/heated seat
☐ on-board electronic anti-theft system
☐ adjustable suspension
☐ airbag
☐ cruise control
☐ daytime running lights
☐ adaptive headlights
☐ anti-fog lights
☐ hazard indicator lights
☐ luggage system
☐ adjustable levers
☐ adjustable seat height
☐ tyre pressure monitoring system
☐ gearshift indicator
☐ fuel economy assistant
☐ start/stop
☐ different riding modes
☐ nothing
☐ don’t know
☐ Autre:

82 Did you modify your powered two-wheeler vehicle to adjust it to your riding habits?
Please choose only one of the following:
☐ Oui
☐ Non

83 Please specify.
If "other" (Handlebar, sprockets, engine, powertrain, etc.), specify.
Please choose all that apply:
☐ Exhaust system different from original
☐ Tyres different from original (make/size)
☐ Indicator lights different from original
☐ Rear mirrors different from original
☐ Wind shield different from original
☐ Modified seat height
☐ Rear suspension: new spring applied
☐ Rear suspension: replaced
☐ Front suspension: new springs applied
☐ Front suspension: fork replaced
☐ Autre:

84 Do you ever lend your powered two-wheeler vehicle to someone? 
Please choose only one of the following:
☐ Never
☐ Yes, to those I trust
☐ Yes, to anyone

85 Do you ever borrow a powered two-wheeler vehicle from someone? 
Please choose only one of the following:
☐ Never
☐ Yes, from the dealer
☐ Yes, from those I trust
☐ Yes, from anyone

IV. Safety habits - Page 7

This part of the survey aims at having more details about your safety habits.

86 What kind of protective clothing do you usually wear? 
Please choose all that apply:
☐ Helmet
☐ High-Visibility Helmet (fluorescent yellow/orange)
☐ Gloves
☐ Motorcycle jacket (without protection)
☐ Jacket with elbow/shoulder protection
☐ Boots (without protection)
☐ Motorcycle-specific boots
☐ Motorcycle trousers (without protection)
☐ Trousers with hip/knee protection
☐ Motorcycle one-piece suit
☐ Back protection
☐ Neck brace
☐ Airbag jacket
☐ Reflective jacket/vest/armband
☐ Autre:

87 What type of helmet do you primarily use?
Please choose only one of the following:

☐ Full-face/integral helmet
☐ Flip-face/convertible helmet
☐ Jet/open face helmet
☐ Brain cap

88 Have you participated in voluntary advanced training (post-licence training)?
Please choose only one of the following:

☐ Once
☐ Several times (several advanced training modules or to adapt to new riding conditions)
☐ No

V. Safety views/attitudes - Page 8

This part of the survey aims at understanding your views about motorcycle safety.

89 Have you been involved in an accident in any form during the last twelve months?
Please choose only one of the following:
Oui
Non

90 Number of accidents
Please choose only one of the following:

○ 1
○ 2
○ more than 2

91 Consequences of (one of) the accident(s)
Please choose only one of the following:

☐ vehicle damage (any vehicle)
☐ body damage, no medical care
☐ body damage, open care
☐ body damage, hospital care

92 Accident type
Please choose all that apply:

☐ Single
☐ Tilting/cornering slow speed
☐ Collision with another vehicle
☐ Collision with road infrastructure
☐ Tilting standing still

93 Guilty part
Please choose all that apply:

☐ you
☐ partially you
☐ other road user
☐ Autre:

94 Add another accident?
Please choose only one of the following:

○ Oui
○ Non

83
95 Consequences of another accident
Please choose all that apply:
- ☐ vehicle damage (any vehicle)
- ☐ body damage, no medical care
- ☐ body damage, open care
- ☐ body damage, hospital care

96 Accident type
Please choose all that apply:
- ☐ Single
- ☐ Tilting/cornering slow speed
- ☐ Collision with another vehicle
- ☐ Collision with road infrastructure
- ☐ Tilting standing still

97 Guilty part
Please choose all that apply:
- ☐ you
- ☐ partially you
- ☐ other road user
- ☐ Autre:

98 Have you experienced a near collision (that did not result in an accident) in the last 12 months, due to the other driver's error?
Please choose only one of the following:
- ☐ no, never
- ☐ yes, once
- ☐ yes, a few times
- ☐ yes, many times

99 Specify how many.
Please write your answer here: ........................................

100 What was the (most frequent) causation factor(s) of your near-missed accident(s)?
Please choose all that apply:
- ☐ other driver's error(s)
- ☐ infrastructure problems
V. Safety views/attitudes - Page 9

101 How would you describe your level of information when it comes to motorcycle safety?
Please choose only one of the following:
- Not sufficiently informed
- Reasonably informed
- Well informed
- Expert in motorcycle safety

102 How do you assess the following statement?
"Motorcycling will never be made risk free."
Please choose only one of the following:
- I totally disagree
- This is not quite true
- I agree partially
- I totally agree

103 How do you assess the following statement?
"Riding a motorcycle involves taking a higher risk than driving a car."
Please choose only one of the following:
- I totally disagree
- This is not quite true
- I agree partially
- I totally agree

104 Which sentence best defines motorcycle safety?
Please choose only one of the following:
- Motorcycle safety, it’s all about car drivers’ training and awareness.
- To make motorcycling safer, it is the job of road authorities to improve riding conditions (road infrastructure, tax cuttings on motorcycling protective equipment, etc…)
- Riding is not more dangerous than other modes of transportation, it is mainly about the right attitude and behaviour, and everyone sharing the road properly
Motorcycling is dangerous and one should be extremely well trained before getting on the road with a bike.

**105 Which sentence best defines new technologies (e.g. cruise control, motorcycle airbag, haptic throttle, vehicle to vehicle communication, automatic braking, etc.) and traffic?**
Please choose only one of the following:
- Accidents happen because drivers are more and more distracted at the wheel by technology.
- Drivers don’t have a choice, new technologies are there and we can’t say “no” to them.
- New technologies enable road use to be safer, greener and less congested. This is the solution to an ever-growing traffic demand.

**106 Which sentence best defines your perception of official road safety campaigns from the local/national road authorities (advertisements, events, TV programmes, etc.)?**
Please choose only one of the following:
- Public road safety campaigns address the right issues and use language and images drivers and riders understand.
- Public road safety campaigns address the right issues, but language and images are difficult to understand, inappropriate or offensive.
- Public road safety campaigns do not address the right issues.
- Public road safety campaigns give a bad image of motorcyclists and motorcycling.
- Public road safety campaigns send the wrong messages.
- I am not aware of public road safety campaigns.

**107 According to your riding experience, what are the main infrastructure problems faced by motorcyclists?**
Please choose only one of the following:
- road structure and design (geometry, curve design)
- road surface (pavement, rutting, manholes, slabs joints, track trams, skid resistance)
- road signs, roadside equipment, urban furniture
- road markings (paintings)
- road maintenance (potholes, bituminous asphalt sealer, longitudinal roadway ridges, manhole covers, roadway debris)
- road works
- hazard signaling (black spot management)
108 What are your safety information sources? Please rate them according to importance, 1 being the most important.
Please choose the appropriate response for each item:

<table>
<thead>
<tr>
<th>Source</th>
<th>1 (most important)</th>
<th>2</th>
<th>3</th>
<th>4 (least important)</th>
</tr>
</thead>
<tbody>
<tr>
<td>motorcycling friends</td>
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<tr>
<td>your national motorcyclists’ organization in your country</td>
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<td>rider education in traffic schools</td>
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<td>articles in motorcycle magazines</td>
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<td>advanced training</td>
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<td>friends or family</td>
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<td>license training before the motorcycle license</td>
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<td>motorcycle clubs</td>
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<td>the National Transport Administration</td>
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<td>information from Road Safety agencies</td>
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<tr>
<td>motorcycle manufacturers</td>
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</tbody>
</table>

109 Specify your other safety information source.
Please write your answer here: .................................
Thank you for taking the time to answer the RIDERSCAN survey.

The survey is anonymous and the privacy of all submitted data is guaranteed.

Do you want to help further? Here is what you can do:

**Get updates**
The results of this survey will be used to complete one of the most important deliverables of the RIDERSCAN project on the motorcycling community in Europe. The deliverable will be available at the end of the project around November 2014. If you want to know more about FEMA and receive updates about motorcycling political news from Europe, please subscribe to our [Newsletter](#).

**Support Motorcycle Safety Research**
After the conclusion of the RIDERSCAN project, FEMA intends to collaborate with the [2 Roues Lab](#) project from the Mutuelle des Motards (France) to further investigate safety-related issues, by putting together a ‘pool of motorcyclists’, or panel. If you would like to participate to the project and become a “Research Panelist”, please fill in our [Research Panel form](#).

**Support the work of FEMA**
The Federation of European Motorcyclists Associations is a non-profit organization. FEMA represents, defends and promotes motorcycling and the interests of powered two-wheeler users across Europe. Essentially financed by motorcyclists’ membership fees, FEMA fulfils its missions thanks to the support of dedicated motorcyclists, their friends and families. If you want to further support FEMA, you can:

- **Join** a Motorcyclists’ Association in your country – check FEMA’s [members list](#)
- Support FEMA with a [donation](#)
- Give us your point of view as a consumer by becoming a “Consumer Panelist” If you want to receive more information, please fill in our [Consumer Panel form](#).

Thank you for your participation.
4.2. SONECOM analyses

- European analyses:
  - Who answered?
  - Bike details
  - Mobility habits
  - Safety habits
  - Accidents data
  - Safety views
  - Cross tables

- National analyses

<table>
<thead>
<tr>
<th>Country</th>
<th>Who answered?</th>
<th>Bike details</th>
<th>Mobility habits</th>
<th>Safety habits</th>
<th>Accidents data</th>
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4.3. Further analyses

- Polytech analysis: Sweden
- Polytech analysis: Spain
- Polytech analysis: Safety perception
- Polytech analysis: Protective equipments
- Polytech analysis: North South
- Polytech analysis: France Poland
- Polytech analysis: Germany
- Polytech analysis: Greece Netherlands