

## **The Transport Accident Commission's Motorcycle Safety Strategy**

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### **Abstract**

Despite accounting for only 3% of registered vehicles and 0.7% of kilometres travelled in Victoria, in 2007/08 over 14% of fatality and 14% of serious injury claims to the Transport Accident Commission (TAC) related to motorcyclists.

Over the past 10 years, motorcycle registrations, number of learner permits issued and new motorcycle sales have notably increased.

TAC's claims costs related to motorcyclists claims have also escalated during this period with the overall cost to the TAC being in the order of 4-5 times higher per vehicle for motorcycles than for passenger vehicles.

Research indicates motorcyclists are 38 times more likely to be injured in a crash compared to car occupants.

With the aim of reducing the number and severity of rider injuries, the TAC has invested extensively in research with motorcyclist's and the industry to ascertain attitudes, behaviours and perceptions towards motorcycling, risk perception and self reported wearing of protective clothing to develop a strategic approach towards motorcycle safety in Victoria.

This paper and associated presentation, documents the TAC's motorcycle safety strategy including the development of public education campaigns, consumer events and activities to communicate the core message; riders can reduce their personal risk by riding at a legal, safe speed and wearing protective clothing.

### **Keywords**

Attitudes, behaviour, education, motorcycle, risk, speed, protective clothing.

### **Introduction**

The TAC is a Victorian Government-owned organisation whose role is to pay for treatment and benefits for people injured in transport accidents. It is also involved in promoting road safety in Victoria and in improving Victoria's trauma system. Funding used by the TAC to perform these functions comes from premium payments made by Victorian motorists when they register their vehicles each year with VicRoads.

Motorcyclists are over-represented in road trauma and the TAC's claims data. Despite accounting for only 3% of registered vehicles and 0.7% of kilometres travelled, in Victoria, in 2007/08 motorcyclists represented over 14% of fatality and 14% serious injury claims to the TAC.

As motorcycle registrations, number of learner permits issued and new motorcycle sales have increased, the TAC's exposure to claims from motorcycling accidents has also increased. The overall cost to the TAC is in the order of 4-5 times higher per vehicle for motorcycles than for passenger vehicles. Motorcyclists account for 25% of all TAC's trauma related costs but only 14% of claims.

Research indicates motorcyclists are 38 times more likely to be injured in a crash compared to car occupants per kilometre travelled. The TAC has invested in extensive research with

riders to ascertain attitudes, behaviours and perceptions towards motorcycling, risk perception and self reported wearing of protective clothing with the aim of developing a strategy to reduce rider injury.

The objectives established for the TAC's most recent business plans are to:

- reduce the number of motorcycle rider and pillion passengers killed or injured on Victorian roads
- promote the regular use of protective clothing to motorcycle riders in Victoria to reduce the impact motorcycle injuries on the TAC scheme
- educate motorcycle riders and pillion passengers about the impacts of speed related road trauma on vulnerable road users
- promote the spokes.com.au website to motorcycle riders to assist in increasing regular visitations
- reduce the incidence of self-reported speeding behaviour amongst riders

## Methods

The TAC motorcycle safety marketing strategy was informed by a range of market (rider) and academic research. Much of the former being commissioned by the TAC to give insight to current rider understandings, attitudes and behaviours. It included:

- Face-to-face research with riders - conducted at the Melbourne Motorcycle Expo, with approximately 300 riders interviewed each year. The research gauges shifts in rider behaviour, attitudes and perceptions of risk over time with specific importance placed on the use of protective clothing. (2002-2007);
- Small groups of riders and retailers; an exploratory study of motorcyclists and motorcycle retailers was undertaken to assist in the development of a public education campaign highlighting the importance of protective clothing for riders. The study involved eleven motorcycle retailers and 40 motorcyclists with a non-directive approach used in each discussion session allowing participants to freely roam across key topics. A wide range of topics were canvassed particularly; perception of risk, protective clothing, risk reduction strategies, motives for motorcycling. (June 2007)
- Small groups of riders and retailers; Motorcycle retailers, wholesalers and rider training centre staff. Sweeney Research conducted the groups to gain an understanding on how the TAC could assist retailers to sell protective clothing to motorcycle riders through sales tools, strategies and initiatives. (September 2008).
- Motorcycle and Scooter Rider Client Research. - Conducted with 500 existing TAC clients to determine at the time of their crash, the level of protective clothing they were wearing and the resulting injuries. (December 2008)
- Motorcycle Tracking Study - Telephone interviews were conducted with 1958 riders. The questionnaire was designed to measure riders' behaviour and attitudes to specific road safety issues and track awareness of motorcycle campaigns. (September 2009 – April 2010)
- Observational Study - The TAC commissioned the Centre for Accident Research & Road Safety – Queensland (CARRS-Q) to conduct the Victoria Motorcycle Apparel Observation Study. The primary aim of the study was to identify the frequency and type of apparel worn by commuting and touring motorcyclists along designated motorcycling routes. The study has been completed and a final report is expected

later in 2010. 1984 motorcycles were observed during the study period. There were also a total of 130 pillion observed. 66% of motorcyclists were observed at commuter sites and 690 (34%) at recreational sites. (March 2010)

Two key issues were identified through the market research:

- Use of protective clothing among riders and
- Rider's perception of the risk of crashing/ being injured.

In light of the results, a marketing strategy was developed and initiatives tackling motorcycle safety were incorporated within the TAC's business plan. They included:

1. Development of public education programs highlighting key risks associated with riding and the vulnerability of riders in the event of a crash with the aim of providing motivation for safer riding practices and increased wearing rates of protective clothing.
2. Maintenance of a retailers program that enables provision of relevant safety information at the point of purchase; and
3. Promotion of protective clothing safe riding practices as well as build a rider subscriber list for spokes.com.au through the TAC's involvement with the Australian Motorcycle Grand Prix and the Australian Motorcycle Expo.
4. Refresh and promote spokes.com.au – a website tailored to engage with riders and promote protective clothing and safe riding practices;
5. Regular surveying of riders with a view to better understanding their socio-demographic profiles, type of motorcycle ridden, riding behaviour and the wearing of protective clothing.

### **Objective: Increase the uptake of protective clothing among the Victorian riding segment**

#### **Activities undertaken:**

*Public education campaigns: Protective Clothing Campaign, March 2008.*

Spearheading this phase of the motorcycle safety campaign was the launch of a mass media public education component in March 2008. Two television advertisements were produced targeting two key riding groups; road riding motorcyclists and scooter riders, highlighting the risks associated with riding without the appropriate protective clothing. The aim of both advertisements was to increase the self reported wearing of protective clothing garments within the riding groups as well as establishing the understanding of the level of risk riders are exposed to.

The primary target audience of the campaign was male motorcyclists aged 18-30 years with secondary audience being Victorian scooter riders aged 18-30 years with a female skew. The secondary target was partners and family members of riders who had an interest in keeping their riders safe.

This was a major public education campaign with television, outdoor, online and print media used to promote key messages.

*Public education campaigns: Tactical Press Campaign, October 2009 – April 2010.*

This campaign was commissioned to assist in combating the excuses commonly quoted by riders for not wearing adequate protective clothing when they ride, such as:

- Cost of protective clothing
- Weather conditions
- Conspicuity of riders
- Only a short trip

- Scooters – short trips and travelling at low speeds
- Inconvenience

The campaign commenced to extend the mass media campaign noted in October 2009; with specific executions for the two key audiences; male motorcyclists and female scooter riders appearing across a variety of print media.

#### *Motorcycle Retailer Program*

In 2006 the TAC developed a program for motorcycle retailers to deliver key road safety messages to riders and specifically, assist in promoting the uptake of protective clothing. The aim of the program is to assist riders to make informed decisions when purchasing protective gear at the point of sale. Educated staff call on 160 retailers across Victoria twice a year, pre peak motorcycling season in September and mid season the following February.

The TAC utilises this channel to distribute protective clothing point of sale materials and other key road safety initiatives for riders such as:

- Ride Smart CD ROM training tool
- Spokes Rider Safety Tip competition
- Great Ocean Road DVD (VMAC)

#### *Website*

Spokes.com.au is the dedicated site for riders developed by the TAC and refreshed in 2008 to allow enhanced interactivity for users. Spokes houses reputable motorcycle related safety information with a heavy focus on protective clothing information. The content provided in this section was authored by Liz de Rome, one of Australia's respected experts in the field on motorcycle safety. Other areas of interest on the site include specific motorcycle events, news, and safety campaigns from around the world. Currently, the Spokes site has 14,000 subscribers.

#### *Market Research*

A dedicated tracking survey commissioned to gauge attitudes/behaviours across a range of motorcycling issues throughout the motorcycling season

**Objective: Establish the perceived level of risk associated with riding among the Victorian riding segment.**

#### **Activities undertaken:**

*Public education campaigns: Risk and Responsibility Campaign, October 2009.*

Complementing the existing motorcycle safety strategy which consists of the Protective Clothing campaign (March 2008), the TAC was seeking to further increase rider's perceptions of their levels of risk – again to provide a platform for individual change to safer riding behaviours.

This phase of the motorcycle safety campaign reinforced the message that as a rider the level of risk, in regards to sustaining an injury, is considerably higher than that of a car occupant and that it is a rider's responsibility to ensure they do everything in their power to reduce their risk levels by wearing protective clothing and riding at a safe, legal speed. The message was regardless of who is at fault, it will be the rider who comes off second best in the case of a crash.

This was a major public education campaign with television, outdoor, online and print media used to promote key messages.

*Events - Australian Motorcycle Grand Prix*

The TAC has been a major partner of the premier event on the social calendar for motorcycling enthusiasts in Victoria since 1998. The TAC continues to utilise this event as an opportunity to engage with riders face-to-face and promote its key motorcycle safety message to all patrons attending the Phillip Island Grand Prix Circuit. Activation of the event involves an interactive consumer display within the Expo facilities showcasing quality protective clothing, providing quizzes and competitions surrounding motorcycle safety issues and offering comprehensive information on protective clothing. This event allows the TAC to activate its message with approximately 25% of all Victorian riders over a three day period.

#### *Market Research*

Dedicated tracking survey to gauge attitudes/behaviours across a range of motorcycling issues throughout the motorcycling season

#### **Results**

Evaluations of the marketing strategy's objectives have been monitored by:

1. TAC claim rate and crash data
  - Number and rate of acute hospitalised greater than 14 days (acute meaning they were hospitalised within 7 days of crash) from motorcyclists (includes pillions)
  - Reduction in police-reported fatal and serious injuries for motorcycle riders and pillion
  
2. Market research continuous tracking
  - Protective clothing wearing rates for specific protective clothing items as measured via observational study and self reported tracking study
  - Gauge attitudes/behaviours across a range of motorcycling issues throughout the motorcycling season.
  
3. Media specific performance rates
  - Percentage of target market who can recall campaign and message as measured via the tracking study
  - Traffic performance of the spokes.com website
  - MotoGP; evaluation of programs run, participation rates of programs.
  - Number of merchandise outlets participating, and quantity of gear distributed via the Retailer Program.

#### 1. TAC claims and crash data

Acute hospitalised greater than 14 days (acute meaning they were hospitalised within 7 days of crash) from motorcyclists (includes pillions):

2007/08: 153 claims (16% of all acute >14 day claims)

2008/09: 179 claims (19% of all acute >14 day claims)

Fatal and acute hospitalised greater than 1 day (acute meaning they were hospitalised within 7 days of crash) from motorcyclists (includes pillions):

2007/08: 702 claims

2008/09: 699 claims

#### 2. Market research continuous tracking

##### *Protective Clothing wearing rates*

Respondents who held a motorbike licence were asked about their incidence of wearing protective clothing.

Significant improvements have occurred since the commencement of the Protective Clothing campaign in

March 2008, particularly in relation to the wearing rates of protective pants. Comparison of these results are summarised below:

	Q1-Q2 08 All/ Most of The Time %	Nov-09 All/ Most of The Time %	Q1 – Q2 08 Sometimes/Never %	Nov-09 Sometimes/Never %
Motorcycle Gloves	89	91	7	5
Motorcycle Jacket	73	92	18	5
Motorcycle Boots	71	76	22	17
Motorcycle Pants	38	68	40	24

#### *Rider attitudes and behaviours*

Reduce the incidence of self-reported speeding behaviour amongst riders

- Achieved 10% post-campaign (December 2009) compared to 14% pre-campaign (September 2009).

#### 3. Media specific performance rates:

##### *Public education campaign results*

##### Protective Clothing campaign, 2008:

Prompted awareness of the campaign tracked at 61%. Recall for the motorcycle execution was particularly high for males 30-49 at 70% and 54% amongst 21-29 year old males.

The campaign has been successful in generating consumer demand for protective clothing and contributed to sales within Victorian motorcycle retailers. Anecdotal feedback from two key retailers is summarised below:

“...As manufacturers and retailers of Motorcycle clothing, we have had an influx of sales due to the current advertising campaign more so than ever before...”

*Gary Simmons. Mars Leathers, Elizabeth Street, MELBOURNE*

“When shopping for a scooter, I asked each store for their advice with regards to safety gear and the main response I got...was that I didn't need much - just gloves and a half face helmet. Your advertisement is a ...wake up call for us riders...If I followed the advice provided by 75% of the people I looked at purchasing from, and then I'd be no better off than the woman in your commercial.”

*Tim Snell*

“To say that your new ad campaign for motorcyclists and scooterists has had an impact would be an understatement. Today (Easter Saturday) our city store was open, for the first time *ever* during Easter. We recorded double our normal sales for a Saturday (always our busiest day of the week), and three times what we had all budgeted for (Expecting quiet trade for Easter Saturday). We had nearly half of our customers tell us that they were upgrading their gear in response to the new T.A.C. ads.”

*Mark Bulic (Accessories Manager, Peter Stevens Motorcycles – Melbourne)*

##### Risk and Responsibility campaign, 2009:

Campaign specific objectives were to:

1. Generate recall of campaign with a minimum of 70% riders surveyed.
  - Achieved 80% (50% general motorists)
2. Reduce the incidence of self-reported speeding behaviour amongst riders
  - Achieved 10% post-campaign (December 2009) compared to 14% pre-campaign (September 2009).

The campaign also achieved a pleasing degree of industry and community recognition in the form of commentary online including:

- Marketing and media – Adnews, Mumbrella, Best Ads on TV, Campaign Brief, Sydney Morning Herald, Herald Sun
- Motorcycle Industry – AMCN (Australian Motorcycle News), Honda Australia, Cycle Torque, Riding On
- Motorcycle Forums and blogs – Netrider, Facebook, Motorcycle Riders Association of Victoria (MRA Vic), Visor Down (UK Website)

The campaign created healthy debate and discussion within the motorcycling community with one organisation, Motorcycle Trader, developing it's own version of the TVC which was posted and distributed via their website, You Tube and Bike Point.

#### *Website Traffic Performance*

The Spokes website averages 600 users per month, however experiences sizeable increases in traffic when marketing activities occur. For example, the Risk and responsibility public education campaign which launched late October 2009 demonstrated considerable traffic to the site.

Provided are the October and November statistics for the Spokes website, due to the campaign launching on the 20 October with expected on-flow into the month of November.

Spokes Website Statistics - OCT	Actual
Total page Impressions	45684
User Sessions:	7070
Av. Frequency:	1.16
Spokes Website Statistics - NOV	Actual
Total page Impressions	27581
User Sessions:	3992
Av. Frequency:	1.09

#### *Moto GP Evaluation*

The Moto GP attracted 105,794 attendees in 2009, up by 4,494 on 2008 figures. The Spokes activation was extremely successful, the expo stand attracting very high interest in the content and promotions. The Spokes stand offered attendees the chance to win \$3,000 of protective clothing by answering a question relating to motorcycle safety. 6,000 game card entries were distributed with 5,563 completed with 1,676 opt ins to the Spokes database.

#### *Retailer Program participation rates*

The retailer program has maintained participation rates with currently 163 stores participating in the program. No stores have exited the program and an audit is conduct annually to ensure new stores that have opened are included in the program.

Involvement of key motorcycle retailers in the TAC's 2010-2011 business planning session has also been valuable to the TAC in developing relevant programs to assist retailers in promoting the purchase of protective clothing.

### **Conclusions**

The short to medium term indicators are promising in an environment where other activities are taking place within the riding community to increase rider safety.

However long term, the upward pressure of increasing numbers in the Victorian motorcycle fleet poses financial implications for the TAC's business as the number of motorcyclists claims are expected to reflect this trend.

The TAC will continue to invest heavily in strategies targeting Victorian motorcyclists to increase the uptake of protective clothing and reduce the incidence of self reported speeding behaviour to assist in reducing the level of trauma sustained by riders on Victoria's roads and in turn, the number and injury level of claims received by the TAC.

### **References**

- TAC Claims 2008-2009
- TAC Motorcycle Tracking Study, May 2010, Sweeney Research
- TAC Advertising Tracking Study Quarter 1 2010, Sweeney Research
- Nielsen Net Ratings, 2008-2010

### **Appendices**

Nil