The Policy Framework for Motorcycling

THE MOTOR CYCLE INDUSTRY ASSOCIATION

How society as a whole benefits from Motorcycling

Second edition: December 2013

How motorcycling can deliver
Cleaner Transport

"As motorcycling is a low Co2 mode of transport, the motorcycle community is astonished at Government policies which continue to overlook the contribution to cleaner transport that motorcycles offer. No valid reason has been offered for this serious oversight and gap in policy. No serious environmental transport policy ignores the role of motorcycling." *Steve Kenward, CEO, MCI*

More motorcycling can help deliver the national goal of cleaner and lower Co2 transport. The industry remains mystified about why successive Government have failed to capitalise on the motorcycling opportunity.

It is now clear that the old 1970s image of motorcycling as noisy, dirty, smelly and dangerous is seriously outdated, with motorcycles now clean and efficiently designed, with a fast improving safety record. They are also used for a variety of purposes. Well over half of all motorcycle mileage is now for commuting and/or practical purposes.

Motorcycles are already contributing to cleaner and more efficient transport, through low average Co2 and developments in the ePTW sector. It is in the national interest for Government to recognise this and offer the policy support which will be necessary to maximise the motorcycle opportunity in transport policy.

Key Notes:

- **Increased market size will mean a higher proportion of lower Co2 vehicles on Britain's roads. Government should encourage motorcycling.**

Support for alternative powered motorcycles (ePTW).

- **There is already a huge potential for ePTWs. The Office for Low Emissions Vehicles (OLEV) recently recognised this.**
- **Government needs to provide the technology policy support and recognition of the ePTW sector in its 'road maps' to alternative powered vehicles.**
- **A proportion of the recently announced £500million under 'Driving The Future Today', to support the uptake of Ultra Low Emission Vehicles (ULEV), should be allocated to ePTW activity.**
- **The continued lack of inclusion of ePTWs in the Plug in Grant is astonishing.**
- **Electric vehicle infrastructure needs to provide for ePTW, with appropriate facilities and parking/ charging facilities for ePTWs.**
- **Technology for 'plug in' facilities needs to be capable for use by ePTWs.**
- **It is vital that UK regulations are harmonised with the EU in the area of eBicycles and so called 'Speed-Pedelecs'. A Speed-Pedelec is an ePTW under the law, but consumers are buying them thinking that they are eBicycles.**
- **The majority of eBicycles are sold in the UK under EU power rules – this means that they are too powerful for UK eBicycle regulations and are in fact ePTWs. This is creating a potentially damaging situation for the sector, which can be instantly resolved via EU harmonisation.**
- **The environmental credentials for many traditional motorcycles are already favourable.**
- **Motorcycles have a lower fleet average Co2 than cars (100-110g/km Co2 compared to approx. 138-145g/km for the car fleet). Mopeds are around 75 g/km, making them close to being 'ULEV' vehicles.**
- **Motorcycles use fewer raw materials and less energy for the construction of a given model**
- **There are lower recycling costs – up to 75% of components can be re-used, with the rest recycled. There are no motorcycle 'scrap yards'.**

'Get On'

The industry's award winning campaign encourages motorcycling as the low Co2 commuting alternative, which offers freedom, flexibility and lower costs for users.

- **Motorcycles need to be recognised in transport policy.**
- **PTW's used a practical transport helps to reduce overall traffic pollution.**
- **PTW's reduce traffic congestion, they do not cause congestion.**
- **Local authorities should also recognise the advantages of motorcycles and recognise their contribution to better and cleaner transport in their plans.**

www.emcia.co.uk

How motorcycling can deliver

Crime and Social Disorder Reduction

A range of complex and often interwoven social issues lie at the heart of crime and social disorder issues.

They can range from a mistake immediately regretted, to an individual's despair at ever being able to change personal circumstances, to boredom, to low level nuisance, to overt but unfocussed criminality, to 'big ticket' organised crime.

No one solution seems to offer a 'magic bullet' to crime and disorder, but there is a strong case for different sectors of society to consider how their activities can contribute to addressing the issues involved. Social engagement and inclusion can be a major factor in mitigating crime and social disorder.

The motorcycle industry has given consideration to how its activities can contribute to the national goal of decreasing crime and social disorder. It is an industry which is directly affected:

- Every 24 hours 77 motorcycles are stolen, equating to over 2,160 per month and over 26,000 motorcycles per annum. This equates to a stolen product value of approximately £26.1million per annum.
- Put another way, up to 22% of new machines sold yearly are at direct risk of being stolen.
- Up to 10,400 people stop motorcycling due to machine theft per annum.
- The industry response is multi layered. On one level industry engages motorcycle theft mitigation though initiatives such as:
  - MASTER Security Scheme, (Motorcycle and Scooter Tagged Equipment Register) approved by police authorities and supported by all major manufacturers.
  - Calls for secure parking facilities.
  - Offering a range of consumer security goods.
  - Education and awareness.
  - Industry has also considered how motorcycles themselves can be utilised help to realise wider social goals in relation to crime and disorder mitigation. Industry has invested in the following areas:
- **Wheels to Work**—Lack of transport in rural areas means reduced opportunities for job seekers. This can, on rare occasions, create social disengagement with attendant potential consequences. W2W offers transport for work by (usually) small motorcycles and scooters, particularly among those young people who have little hope of funding transport costs when they first start work. It creates individual pride and engagement.
  The support for Wheels to Work (W2W) from the DfT since 2012 has been very welcome. It has allowed proper national coordination to be put in place and has empowered the sector. The number of individual W2W schemes has started to rise again. It is vital that Gvmt continues its support for this socially important programme.
- **Promotion of motorcycling as low cost transport**—Individual transport can often mean that individuals have pride and control over their own lives. Motorcycling is a relatively low cost for of transport for both practical and leisure purposes. It offers social engagement.
- **Motorcycle Sport**—A source of public nuisance can be youths on 'dirt bikes' riding illegally in estates or in areas where off road riding can cause complaint. The industry's sport project aims to highlight the importance of organised off road motorcycling, its role in social engagement and the creation of a sporting ethos and pride.
- **Young Riders**—Industry has invested in programmes to engage young people in educational motor projects. It has also funded media initiatives aimed at engaging young people who ride scooters illegally or in an unsafe way and works with BikeSafe.

Key Notes

Government can assist the industry's efforts in these areas by:

- **Ensuring that safety policy takes account of motorcycling in a holistic way.**
- **Engages the young in responsible and legal motorcycling.**
- **Support for BikeSafe encourages responsible motorcycling at different ages.**

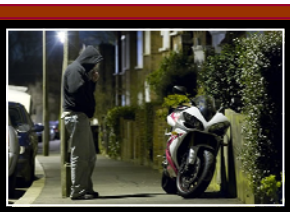
Offering Support for Motorcycle sport

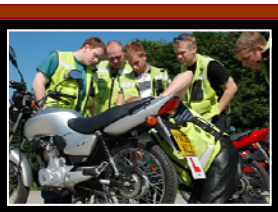
- **Reduces illegal off roading.**

Motorcycles in Transport Policy

- **Helps secure policy engagement with issues of concern and opens the motorcycle option to many who can't afford to travel medium and long distances by other means.**
- **Transport policy which opens up low cost motorcycles as an option for young people can help individual mobility and social inclusion.**

Continued support for Wheels to Work.





How motorcycling can deliver
A Rebalanced Economy, Economic Opportunities, Reduced Social and Business Costs

"A seven billion pound industry such as the motorcycle industry is not one which can be ignored or overlooked in Government policy. The motorcycle industry is well placed to deliver jobs and growth with a focus on supporting efforts to rebalance the economy towards manufacturing, retail and export." *Steve Kenward, CEO, MCI*

The UK motorcycle industry comprises the five key sectors of: manufacturing; distribution and retail; repair; servicing and maintenance; sports and leisure; and other support services (training and testing, financial services, motorcycle couriers, motorcycle hire, marketing and publishing).

The UK motorcycle industry is of considerable size with net annual sales in 2010 of almost £5.2 billion and has a significant impact on the UK economy, generating added value of more than £2 billion per annum. For comparison, this is more than gambling and betting activities and the production, distribution and promotion of all film, video, TV and music in the UK (GHK).

The industry directly employs 65,500 people in more than 6,350 businesses, which is more than each of the following: UK call centres; the market research sector; taxi driving,; libraries; museums and other cultural activities.

The following key facts are known about the PTW transport sector in great Britain:

- Approximately 4 million licence holders
- Over 400,000 new and used machines change hands each year
- 353 businesses are directly involved with manufacturing businesses (GHK study 2010)
- PTWs represent approximately 1% of road miles travelled a similar share to cycling
- More than 60% of all PTW travel is related to non leisure use, such as commuting, practical and utility purposes (DfT)
- 2.8 billion vehicle miles were travelled by PTWs in 2012 (DfT)
- Export markets for all products were valued at £370 million in 2010 (GHK study 2010)
- Triumph exported 80% of the nearly 50,000 machines produced in 2010
- The industry contributed just over £1billion in taxes in 2009 (GHK study 2010)

Key Notes:

- **Increased sales/market size means economic growth, more jobs, more income to the Exchequer.**

Strong Action on EC Issues

- **EC proposals for Type Approval regulations threaten profoundly negative impacts on industry and consumers. BIS should join forces with DfT to champion British industry in Brussels .**

Support for Motorcycle Sport

- **Government needs to recognise the sport's half billion pound economic contribution and ensure that policies across departments support the sector.**

Motorcycles in Transport Policy

- **Improved access for motorcyclists and explicit recognition of the role of motorcycling in transport policy means overall economic and social benefit, included reduced overall transport costs to individuals and business, plus increased mobility and lower Co2.**

Industry Friendly Business Policy

- **The inclusion of the two wheeled sector in the Government's Automotive Council strategy is both welcome and helpful.**
- **However, BIS need to build on this through including the industry within the Automotive Council and other relevant Departmental activity, specifically Triumph Motorcycles as the UK's largest solely British owned bulk automotive manufacturer.**
- **Norton Motorcycles have re-emerged as a manufacturer and businesses such as CCM and Metisse make notable contributions to the vitality of the UK industry. All have launched or are developing new products since 2011.**
- **A large number of component, accessory and clothing manufacturers are based in the UK, along with many supply chain businesses.**
- **Business policy needs to be oriented to enable such businesses to enhance their competitiveness. This includes reducing the impact of regulations and reducing red tape.**

(A further update to the MCI's economic profile of the UK motorcycle industry will be published early in 2014)

www.mcia.co.uk

How motorcycling can deliver

UK Sporting Pride

What Value is Motorcycle Sport to Society?

Motorcycle sport is often not fully understood. Many people see the sport as being only the top class range of UK and international track racing events. UK track racing often sets the standard, with several UK venues running major national and international series.

However, off road sport remains the area of motorcycle sport with the highest participation levels, with several disciplines which are run from a range of venues. Since 2007, there have been on average over 4000 off road events per year, with over 55,000 riders taking part. Events range from schoolboy motocross to high profile motocross races.

Some events can be significant economic generators. For example, the Isle of Wight Motocross GP in the 2000s attracted around 30,000 spectators with an estimated local economic benefit of around £2million. The total number of spectators for UK events is estimated at around 1.7 million per annum, who spend approximately £34million. Overall, motorcycle sport currently represents approximately three quarter of a billion pounds to the UK economy.

Key Notes:

Support for Motorcycle Sport

- **The establishment of motorcycle off-road sport as a recognised sport in Government policies and literature.**

Code of Practice

- **Government to continue support for the Motorcycle Sport Code of Practice which has been developed by the sport governing bodies. The Road Traffic Act needs to be amended to ensure that sport governing bodies adhere to the Code.**

Land Access Issues

- **Government and agency policies should ensure that land is available for off road sport. Policies on 'agri-environment' schemes (HLS/Glastir) need to recognise the need for land to remain accessible for organised events.**
- **Forestry access needs to be maintained for properly managed motorcycle sport events .**

National pride in the sport and prestige is important

- **The UK has produced many household names in the area of motorcycle sport.**

Accessible Sport for Young People

- **Engaging young people in the sport can help tackle youth crime, social exclusion and nuisance.**

What Issues Are Being Faced?

Unfortunately, off road motorcycle sport is under considerable threat from the closure of venues and denial of access to facilities.

Such restrictions on motorised off road sport are often motivated by concerns about the environment and excessive noise that can be generated through irresponsible or unregulated use. Sometimes badly organised events by ad hoc organisers create local problems which give the sport a bad image. Illegal riding by individuals can taint an entire community's view about off road motorcycle sport.

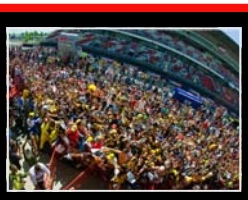
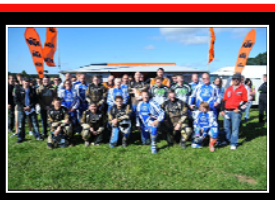
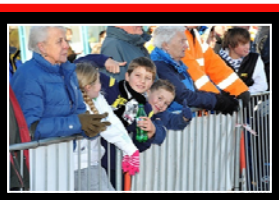
Properly organised off road motorcycle sport can be of great value to local communities and can also engage young people in safe and responsible riding, thereby helping to reduce the incidence of illegal and nuisance off road motorcycling, in itself a matter of great concern to communities and the police.

Improving Standards

The main off road sport bodies (ACU/AMCA/BSMA/ YSMA) are event 'authorising bodies' under the Road Traffic Act. They operate to clearly defined codes of practice for the management of events. All are supporters of the umbrella Motorcycle Sport Code of Practice (www.mscode.co.uk).

In order to maintain and improve standards, the above bodies are calling on Gvmt to link the Code to the Road Traffic Act, in order to ensure that all motorcycle event authorising bodies named in the Act are required to operate to a clear set of basic standards and to require these from events they issue licences to.

The established sport governing bodies are members of the MCI Off Road Group, with the MCI, ACU and AMCA contributing to a Motorcycle Sport Political Strategy Group. For further information see www.mscode.co.uk.

UK Motorcycling 2012/13

The Market

- **How many bikes?** -- 93,667 Powered Two Wheelers of all types sold in 2012.
- **The trends?** -- The market has fallen by 22% since 2008.
- **Who's riding?** -- Approximately 4million UK motorcycle licence holders – 8.7% of the population who are eligible to vote – the motorcycle vote matters!
- **How much riding is there?** -- 2.8million miles travelled by motorcycle in 2012 – more than 60% for commuting or other non-leisure reason.
- Where are bikes being ridden? -- Nationwide, though approximately 28% of the market is in London and SE.

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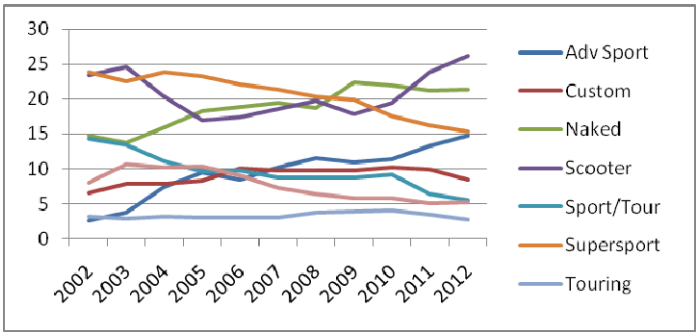
UK Road Motorcycle Market Shares above



Safety Context (Historical)

Progress	1984	2012	% Change
Killed	967	328	-66.08%
Serious	19,042	5,000	-73.74%
KSI	20,009	5,328	-73.37%
Slight	43,812	13,982	68.09%
Total PTW Cas	63,821	19,310	-69.74%
All road user fatal	5,599	17,54	-68.67%

Killed 1960	1,742	328	-81.17%
Killed 1927	1,175	328	-72.09%

Road Safety 2012/13

Progress	2005-9 ave	2012	2012/ 11 %	2005-9 %
Killed	544	328	-9	-40
Serious	5,776	5,000	-5	-13
KSI	6,320	5,328	-5	-16
Slight	16,452	13,982	-4	-15
Total PTW Cas	22,772	19,310	-4	-15
All road user fatal	2,816	1,754		-32
% PTW deaths	19.45	18.70	-2	-4
Motorcycle Traffic	3.20	2.80	-2	-14
PTW Casualty Rate				
KSI	1,950	1,884	-3	-3
Slight	5,076	4,944	-2	-3
All	7,027	6,828	-2	-3

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How motorcycling can deliver
Wheels to Work

It is well documented that the lack of affordable and available transport can have a negative effect on opportunities for training, education and employment, particularly for young people and for those living in rural areas where public transport is restricted or only available during business hours.

'Wheels to Work' (W2W) is a term used to describe schemes which provide affordable transport to individuals who are unable to access training, education and employment, due to a lack of suitable public or private transport. Mostly this is either mopeds or scooters but some schemes also offer bicycles, electric bicycles some are trialling electric scooters.

Originally intended to primarily cater for young people, W2W has proven to be successful for clients of all ages and recent evaluation has shown applications from those over 25 are increasing rapidly. Typically, a W2W scheme will charge around £20 per week for a moped, but charges differ slightly depending on the local organisation running the scheme. Most schemes require clients to have a firm offer of employment, training or further education in order to qualify for assistance, although some schemes do encourage applications before the placement is secured. The second main criterion is that there is no suitable alternative transport solution available. For many clients this could mean that they are required to work shift patterns that are outside the times of public transport provision.

W2W was trialled in Shropshire with 50 bikes and gained national prominence in 2002. Since then, schemes have been established in a number of local authority areas around the UK, these were initially supported via grants from the Countryside Agency. Following changes to the Countryside Agency as a result of Defra's Rural Strategy in July 2004, the funding that many W2W schemes received was intended to be transferred to Regional Development Agencies (RDAs). These of course no longer exist and despite wider Government recognition of the value of W2W schemes; no particular Department has assumed responsibility for W2W in entirety or provided direct funding.

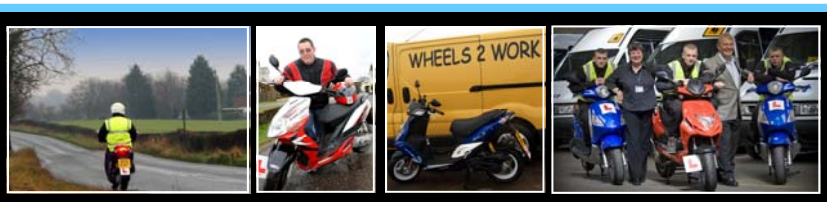
However, there is clearly Government backing for the W2W concept.

The Prime Minister, on awarding the very first W2W scheme, which started in Shropshire with a Big Society Award, said: ***"Wheels to Work does a great job of tackling the basic issue of making sure everyone who needs to travel to a job is able to do so. This is an invaluable service without which many of these young people would have to move away from their friends and families".***

Robert Goodwill MP, Parliamentary Under Secretary for State for Transport, whilst explaining changes to local transport through the local sustainable transport fund, said: ***"This gives local authorities power to deliver their own transport projects, such as the Wheels to Work Schemes."*** **He went on to praise the concept explaining how they *"help people to come off benefits and regain independence."***
He also acknowledged that riding a *moped* ***"can improve awareness of safety on the roads, knowledge of the highway code and road signs, which can in turn make it easier to learn to drive a car."*** He described Wheels to Work as a ***"value for money way of bringing people and jobs together. We will certainly continue to encourage inclusion of these schemes in the transport planning process."***

The Wheels to Work Association

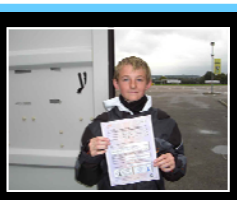
Research undertaken by the Motorcycle Industry Association (MCI) has shown that by June 2012 the number of W2W schemes in the UK had fallen to 24, this was from a high point of around 60 in the early 'noughties'.

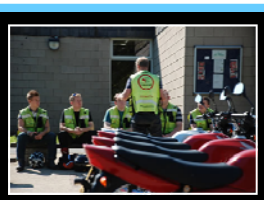


In September 2012 Department for Transport awarded a grant to the MCI to establish a national organisation to represent all W2W schemes throughout the country and to facilitate the building of a national network for W2W. The Wheels to Work Association (W2WA) was launched in January 2013. At the launch, former **Defra Minister Richard Benyon** described W2W as a ***"mainstream solution for transport problems in rural areas".***

The W2W Association is a representative organisation whose Board of Directors consist of W2W coordinators from around the UK. It shares 'best practice', advises on the setting up of new schemes and most importantly, assists W2W schemes with business modelling and procurement strategies, enabling them to run in a more self sustaining manner. The W2WA Board has appointed a national coordinator to maintain and enhance links to local and national Government and be the 'voice' and advocate for W2W in the UK.

Since the low point of 24 schemes in 2012 there are now around 33 schemes in the UK, run by local authorities, rural community councils and social enterprise companies. Funding still comes from a variety of disparate sources but the DfT's Local Sustainable Transport Fund has provided capital for the creation of several new schemes. In addition, the W2W Association will assist W2W schemes in developing sustainable business plans which will be able to attract support and funding from both public and private sectors.
www.wheels2workassociation.org





How motorcycling can deliver
Road Safety Improvements

"Motorcycle casualty numbers are at their lowest level since records began in the 1920s. The image of motorcycling as a dangerous and irresponsible activity is outdated and it is prejudicial and damaging to the road safety debate to sustain such an image. Support at all levels of Government is required to help reduce the share of motorcycle accidents among road users." *Karen Cole, Director of Safety, MCI*

We often hear concerns about motorcycle safety, with safety problems cited as a reason to not integrate motorcycling into mainstream transport policy. But it can be argued that shutting motorcycling out of policy, regarding it merely as a 'problem', with accompanying anti motorcycle commentary from a number of 'expert' commentators and lobbyists can actually have the effect of sustaining road hazards and rider vulnerability. A new approach is needed.

Indeed, evidence is emerging that more motorcycling could actually reduce casualties. There are studies that suggest this is the case and market figures versus casualty numbers in different European countries reveal that once motorcycles reach around 10% of road traffic, casualties fall significantly (ACEM). A similar pattern is revealed when the data from global regions are compared (ACEM/IMMA). In the UK, increases in motorcycle use have generally led to a notable fall in casualty rates. A productive international level MCI/ACPO conference at the DfT in November 2013 explored this area in a very positive way.

Evidence is increasing that Government policy needs to properly 'mainstream' motorcycling as part of their overall transport policy. This would allow the proper development of measures which would reduce rider vulnerability in addition to providing support for riders. Real time casualty reductions could be the result.

Money and policy support is being poured into cycling with the objective of both encouraging cycling and also tackling cyclists' vulnerability. Industry supports this general approach, but feels that such support and spending should be more balanced towards similar support for PTWs. The current imbalance arguably sustains motorcycle rider vulnerability -- a situation which industry contends the Government should take responsibility for.

The OECD prioritised the integration of motorcycling in overall transport policy as a key factor in tackling motorcycle casualties. This is because road safety campaigns and other activities aimed solely at the rider can only go so far in solving the overall casualty problem.

Cycling has a similar share of road traffic as motorcycles and almost exactly the same number of overall casualties. Therefore the policy treatments of both modes should be similar.

Key Notes:

- **A new motorcycle safety and policy Framework is desperately needed. It has been eight years since the last Government motorcycle strategy and further progress in casualty reduction is under threat.**
- **The MCI and ACPO have initiated a new approach to developing safety and transport policies to support motorcycling and reduce casualties. DfT need to engage this process fully and assist the process towards a new National Motorcycle Safety and Policy Framework. MCI and ACPO will be working towards this goal during 2014. Industry is pleased that Ministers are taking an interest in this process.**

Vocational Training for ATB Instructors

- **Approved Training Bodies help maintain standards among motorcycle trainers. Government should support industry efforts to introduce better standards for instructor training and accreditation.**

Safety Publicity

- **Via Think! should receive continued support from the DfT.**

Better Licensing Policies

- **The European Third Driving Licence Directive has now been implemented. It has caused great confusion and could act as a discouragement to taking the bike test, or moving through the licensing stages. At worst it acts as a discouragement of**

motorcycling.

- The 2009 changes to the motorcycle test reduced the number of riders taking tests and damaged the reputation of training and testing. The Government's 2010-13 test review failed in relation to the most important of its core objectives. Minor positive changes were made, but the issue of geographical access and test capacity when the motorcycle market recovers was not addressed. Industry considers the research which was conducted as part of the review to be flawed.
- Additionally, the current cumbersome and inflexible testing structure was not addressed properly by the Review and remains in place. The review reflected badly on both the Government's ability to find creative solutions and the process of policy making within the soon to be former DSA. It is to be hoped that the new Driver and Vehicle Standards Agency will take a more creative and responsive view of training and testing policy and that a fresh and more positive debate about this vital areas can be initiated.

PTW accessibility

- Road design and infrastructure needs to be motorcycle friendly, with good levels of parking, access to bus lanes etc. IHIE guidelines should be implemented.

Reduce Permanent Learners

- Better accessibility to a test at reasonable cost to candidates will encourage people to take the test and not simply ride forever on 'L' plates. Any plans to limit the life of the CBT certificate will not address this fundamental point.
- More support for Bikesafe / Enhanced Rider Scheme

Level Playing Field with Cycling

- The response to the rise in cycling fatalities is 'do more for cycling'. Any rise in motorcycle fatalities would give rise to an entirely different response. There should be no place in mature policy making for such institutional bias.

Strong Action on EC Issues

- EC Directives on motorcycle licensing have created cost, bureaucracy and confusion, while arguably having little impact on safety standards. If EU regulations cannot be interpreted to allow a simple to understand licensing structure, or a single event on road test, then those regulations need changing. For this reason, industry supports the repatriation of licensing competencies from the EU.

The 'Euro MoT'

- Industry supports the principle of Roadworthiness Testing and feels that the UK MoT is sufficient for the national need. Europe wishes to create a new and complex bureaucracy for the MoT, with additional testing criteria. Safety is the apparent justification, but safety evidence is largely absent in Europe. It is noted that the main driving force behind the proposals are specialist commercial testing houses in the EU.
- One size does not fit all when it comes to these matters. The UK MOT system works well and should be left free of EU interference.
- Local authorities should also recognise the advantages of motorcycles and recognise their contribution to better and cleaner transport in their plans.