



National Motorcyclists Council

Motorcycling and the Future of Transport Policy



National **M**otorcyclists **C**ouncil

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Foreword

Motorcycling is a dynamic part of society and transport. It is a transport alternative and source of leisure and lifestyle which is enjoyed by over a million people today. It makes a positive contribution to society’s vitality, the environment and the economy. Motorcycles already contribute to a low carbon future. Motorcycle use reduces traffic congestion. Safety has significantly improved over the last 20 years, with more progress possible if motorcycling’s benefits are recognised and invested in by Government and public authorities.

This paper from the National Motorcyclists Council (NMC) seeks to further the discussion about the role of motorcycling. It sets out in a clear concise format the policies that will work to the nation’s benefit, addressing mobility, the environment, safety and accessibility. It also recognises the vital contribution that motorcycling makes to the UK’s culture, leisure, economy, heritage and sport.



Motorcycling in 2022 – The Key Facts

The Motorcycle Market

- New motorcycle registrations are 20% higher than those in an average of 2010-2014
- 114,371 new motorcycles of all kinds were registered in 2021
- 6,029 mostly commuter electric motorcycles were sold in 2021 – approximately 5% of the overall market



How Motorcycles Are Used

- Motorcycles represent up to 3% of transport – much higher in some urban locations
- Motorcycle usage has risen by 4.1% in recent years. 1.4 million people regularly ride. Around 3 million people hold full motorcycle licences
- Nearly 2/3 of motorcycle use is for commuting or other practical reasons



Environmental Benefits of Motorcycling

- Motorcycle use can more than halve Co2 from private transport. The average Co2 from motorcycles is 99g/km. For cars this is 210g/gm
- 62% of all motorcycles registered in the UK and Europe are commuter types, with average Co2 emissions of 64g/km
- Motorcycle use cuts traffic congestion – a 10% modal shift to motorcycles can reduce congestion by 40%. Motorcycling also reduces pressure on transport infrastructure and parking



Motorcycling's Contribution to the Economy

- The motorcycle sector in the UK was valued at over £7 billion prior to the pandemic
- Motorcycling supports up to 50,000 people in over 5,000 businesses across several sectors of society
- In 2021, the UK and EU industry was valued at 21.4 billion Euro, supporting 389,000 jobs. UK motorcycle sport was valued at nearly £1 billion in 2016



Road Safety and Motorcycling

- Motorcycle casualties have fallen by 50% over the last 30 years and by 16.6% over an average of 2010-2014 casualty numbers
- The number of casualties per mile travelled has fallen by 21% from the 2010-2014 average
- Deaths have fallen by 4% over the 2010-2014 baseline



How Society Can Further Benefit from Motorcycling

Policy Inclusion

- Bring motorcycling into the mainstream of transport, recognised and facilitated as a legitimate form of transport for commuting, logistics and leisure activity. A strategic framework for motorcycling is needed.
- Recognise the benefits of motorcycles in the context of the 3 pillar sustainability model (economic / social / environmental).

Environmental

- Motorcyclists' groups need a voice on timetables, process and legacy protections around the phase out of fossil fuels. Low polluting current motorcycle types should be encouraged as part of the Transport Decarbonisation Plan. Move towards global net zero targets in a manner which can make the best use of current and future technologies.



Safety

- Achieve fewer motorcycle deaths and serious injuries through reappraising Vision Zero messaging to create a 'Welcoming Roads' approach, so unlocking investment in motorcycle safety.
- Government to initiate a fresh appraisal of the UK testing and training regime, taking account of recommendations made by the NMC. Provide more support for post-test training.

Regulations

- Opportunities exist to redefine a range of technical regulatory areas. However, these need to sit alongside a range of global technical standards. All new measures must be developed in full consultation with motorcycling organisations.

Access All Areas

- Accessibility to the full road network, designed to keep motorcyclists safe. Better and more equal treatment of motorcycling in the statutory regulation of traffic on both sealed and green roads. No access restrictions in National Parks and AONBs.

Economic

- A greater recognition of the contribution that motorcycling and motorcycle sport and leisure makes to the UK economy and jobs.

Heritage Protection

- As an important part of the UK's cultural heritage there should be no time limit introduced on how long older bikes can be on the road. Access to all highways, both tarmac and green roads, need to be maintained, as does the 40 year cut-off for historic vehicle status.



Introduction

2022 is set to be a pivotal year for motorcycling. Transport policy and the nature of transport itself has never come under such intense scrutiny. The demands of the travelling public, the need for mobility, choice in how we travel and for that travel to be cost effective and efficient has collided with the developing demands of environmental policy and how new technologies for transport are best utilised for the riding and driving public.

Yet despite approaching three decades of transition away from the 'car economy', the spectre of traffic congestion and pollution has yet to be shaken from the nation's psyche. Roads remain congested, traffic pollution remains an issue and policies to drive change have brought with them mobility and safety challenges.

The dream of integrated transport still eludes us, as proper integration between transport modes has yet to be fully developed and for many, reliance on personal transport remains, often for very reasonable and practical reasons. Key elements in the transport 'tool box' such as the hugely versatile motorcycle have yet to be properly recognised and utilised, with poor policy investment in the mode sustaining a vulnerable environment for riders.

Doubling down on the traditional alternatives and making private vehicle use ever more difficult and expensive, can only go so far, as public transport availability is either limited or unavailable in many areas. Walking and cycling can only meet a limited range of mobility needs. Although 'novel' modes such as e-scooters (Powered Transporters) may have a role to play in high density urban areas, they will not plug the gap in alternative mode provision across the wide range of UK situations which is needed if we are to see more people switch from cars.

The Covid-19 pandemic has brought the problem into sharp focus, with people less willing to use public transport and instead looking to find Covid-safe alternatives. This has fuelled motorcycle sales in particular.

Motorcycling offers a desirable low congesting and low or zero polluting alternative that is already well developed and regulated, but has never been properly considered as a transport mode in its own right.

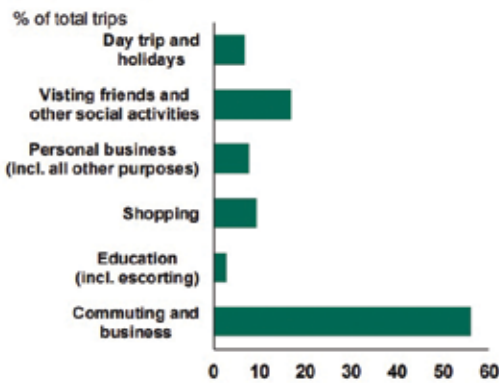
As the UK emerges from the pandemic, there is an ideal opportunity to recognise motorcycling as a travel alternative and develop its role as transport. They should be considered as a more sustainable mode of transport, vital in addressing all three pillars of sustainability: economic, environmental, and social. Motorcycling is also a much more 'active' travel mode than the car. It has never been clearer that the time has come for motorcycling to finally take its full place in public policy alongside other non-car travel and leisure modes.



Part One: UK Motorcycling in 2022

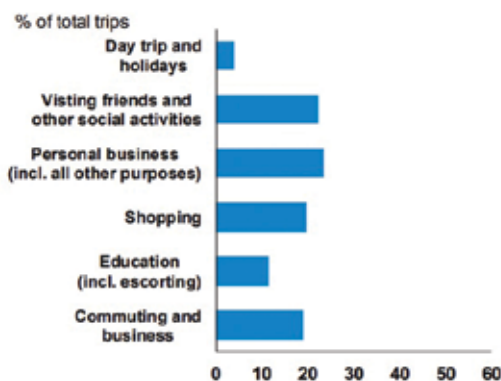
Motorcycles and scooters, sometimes known collectively as Powered Two Wheelers (PTW) are a notable component of the UK transport system, occupying between one and three percent of road transport depending on relative traffic density in various locations. Some parts of London for example, see motorcycles occupying a far higher percentage of road traffic. DfT have estimated that over half of motorcycle travel is undertaken for commuting or business purposes, with a further proportion for access to education, shopping, or personal business. Therefore, in terms of day-to-day riding, motorcycles are predominantly a practical transport mode. That said, leisure and sport is a key component of the market which underpins its wide practical element. This sector encompasses the premium end of the market, with significant economic impact which reaches beyond riding into the wider local and national economy.

Chart 15: % of motorcycle trips by purpose: England, 2002-2016



National Travel Survey factsheet: England 2016: Page 6

Chart 16: % of all trips by purpose: England, 2002-2016



Motorcycling and Society

Motorcycle usage has risen by 4.1% in recent years. 1.4 million people regularly ride (MCIA Pocket Guide). Around 3 million people hold full motorcycle licences.

In terms of economic impacts, the UK supports a motorcycle sector which was valued prior to the Covid-19 pandemic at approximately £7billion. It employs around 50,000 people both directly and indirectly, in around 5,500 businesses. (ICF International). There are around 1.4 million people who regularly ride, with an estimated 3 million people who hold a licence to ride a motorcycle or scooter. A recent study by the European

manufacturers association ACEM, which covers the UK (The Economic Importance of Motorcycles to Europe), offers insight into several key areas of the overall motorcycle sector. Key findings are that European GDP supported by the motorcycle sector amounts to 21.4 billion Euro, with 389,000 jobs supported.

Where this study could go further is in areas more related to the activities of motorcyclists themselves. A large amount of GDP related activity takes place as riders interface with the wider world, particularly in areas such as tourism and local events, where local goods and services are supported, which includes accommodation. Motorcycling supports a wide range of business activities from the motorcycle trade to financial services and local business. The Study's authors recognise this and note that; '...it has not been possible to measure the precise economic impact of these services as part of this exercise, but their economic and social role should not be overlooked.'

The study also noted that on average motorcycle journey times are around 30% shorter than those in cars and that the annual cost of commuting by motorcycle is nearly a third of the cost of commuting by car.

The most recent economic study into UK motorcycle sport (ACU/AMCA 2015) gave a total value of approaching £0.9 billion. This was up by approximately 20% over 2004. This not only values direct spend on events and bikes (off road and track racing) by riders, but also, parts and high value equipment such as motor homes. Off Road sport attracts near 1.5million spectators per annum from all walks of life. The UK is a world leader in the motorcycle sport sector, with many internationally recognised events which attract large numbers of overseas visitors.

Green roads and trail motorcycling is a popular leisure pastime on unsealed public highways, using road legal motorcycles on the nation's unsealed highways which are open for legal use. The Trail Riders Fellowship has valued this activity at £106 million to the economy per annum, with a further £11 million in related tourism expenditure contributing to local economies.

Classic motorcycling is an important part of the UK's £18 billion historic vehicle sector. A Centre for Economics and Business Research report for the FBHVC estimates that of the approximate 3 million classic vehicles, nearly 675,000 are motorcycles, 29% of the sector. Annual sales, maintenance and repair of classic motorcycles, plus related parts and equipment, amounts to nearly £145 million per annum, with additional expenditure on insurance. Classic motorcycle events are hugely popular among both riders and the wider general public. Historic motorcycles are therefore a notable part of overall economic activity from the UK's motorcycling sector.

What are Riders Riding?

The UK new motorcycle market has evolved considerably in recent decades. From a market dominated by sports-styles models 20 years ago, the 'Roadsport' segment now occupies around 12% of the market. Pure commuter/utility types occupy around 30% of the market, with around 58% of the market comprising mixed use types, with many being used for commuting and practical purposes in addition to lifestyle and leisure.

The MCIA publishes new registration data via its [press statistics](#). These contain a comprehensive breakdown of the

market by style of machine. In 2021 some of the categories changed but is possible to gain a broad overview of how the market has evolved in terms of buyer intentions in three main areas; commuting, mixed use and pure leisure and sporting styles. Though it should be stressed that there will be a lot of crossover of different types of usage within these broad segments. Market figures for 2021 are set against a baseline average of the market between 2010 and 2014 in the table below.

From this, it can be seen that the market has enjoyed robust growth over the baseline, with very significant growth in the mixed use styles, mainly 'Naked' multi purpose bikes and 'Modern

UK Motorcycle Market			
	Baseline 2010-14	2021	% Change
Commuter Styles	32,222	33,196	3.02
Mixed use styles	40,969	66,888	63.26
Sport / Competition styles	22,148	14,287	-36
Total Market	95,339	114,371	20

MCIA / NMC

Classics'. More sporting and competition styled machines, many of which can be adapted for off road competition for example, have seen a decline of 36%.

Covid-19 Pandemic

Motorcycles of all types have seen a particular surge in public interest during the Coronavirus crisis. This is because they offer a socially isolated and Covid-safe form of transport. MCIA noted a surge in registrations of new commuter types during the pandemic as transport users looked for a Covid-safe alternative. The table below, extrapolated from published MCIA data, shows how the market evolved during the height of pandemic lockdowns in 2020.

PTW Market movements in 2020				
	Q1 versus 2019	Q2 versus 2019	Q3 versus 2019	Q4 versus 2019
Motorcycles (all engine size)	-12.80%	-4.2%	23%	25%
Scooter (all engine size)	-9.90%	-18%	38.20%	33.04%
50cc	26.60%	21.80%	28.50%	49.86%
Electric PTW (extracted from above)	77.50%	-0.20%	75.80%	61.28%

MCIA

The sharp growth in pure commuter styles and electric motorcycles is notable. There was an increase in food and other deliveries by motorcycles during the lockdown, with initiatives such as the [Bike Shed Community Response](#) emerging.



Part Two: What Motorcycling Offers

Motorcyclists comprise people from all walks of life, from those engaged in a motorcycling lifestyle and the sport, to day-to-day commuters who may not even describe themselves as motorcyclists. Of the 1.48 million people who regularly ride, a large proportion use motorcycles or scooters mainly as practical and commuter utility transport. There are also many who ride machines aimed at enthusiasts who use their bikes for getting to work and other practical purposes. Motorcycling crosses social demographics, lifestyles and aspirations.

Convenience and Mobility

Motorcycles offer lower cost personal mobility, which can be more convenient for many journeys. This means lower journey times and fewer or zero emissions. With smaller and lighter characteristics, motorcycles occupy less road/parking space and cause reduced wear and tear on road infrastructure compared to other forms of transport.

Lower Energy Use

Motorcycles have good fuel economy and consume less energy over their whole life (Zemo). They require less energy to manufacture and recycle compared to cars. With the correct incentives, motorcycles and scooters can play a significant role in the aim to reduce vehicle emissions.

Economic Transport

Motorcycles offer transport efficiencies for individuals especially in urban areas. Motorcycles are also often less costly to buy. That, combined with lower fuel usage and lower Co2, plus reduced maintenance costs, means that motorcycling offers road users improved mobility delivered more economically.

A 2011 study by [Transport and Mobility Leuven](#) showed that a modal shift of 10% from private cars to motorcycles reduced lost vehicle hours in congestion on a trunk road by 40% for all vehicles using that route. A modal shift of 25% (one quarter of all cars replaced by motorcycles) eliminated congestion altogether.

A 2009 study published by the University of Paris ([Pierre Kopp](#)) showed that the 36% increase in motorcycle traffic in Paris between 2000 and 2007 accounted for a net benefit of €168 million.

Environmental Benefits

Electric and low emission 'powered two wheelers' (ePTWs) were not incentivised until the 'Plug in Grant' was extended to the electric motorcycle sector in 2015 – several years after the equivalent car grant was introduced. As a result, the UK is still far from being a well-established market for electric motorcycles and new registrations of ePTWs have, until very recently, been slow. That said, new zero emission PTW registrations are starting to increase, notably among the buyers of commuter machines. In 2021 around 5% of new motorcycles registered were zero emission. The focus of this growth is in the sub 15kw commuter sector.

The ACEM economic study also covers environmental and congestion factors and found that powered two wheelers emit an average of 99g/km of Co2 – less than half of the 210g/km average of petrol and diesel cars. This environmental benefit is further enhanced when it comes to predominantly commuter

motorcycles, as under 250cc machines emit an average of 64g/km, with this category of machines comprising 62% of all motorcycles sold across the UK and EU.

The MCIA/Zemo study '[PLV Life Cycle Analysis Study](#)' found that in almost every scenario examined in the study, the L-category vehicle produces lower lifetime greenhouse gas emissions per km travelled than the comparison passenger car and van performing the same task. This is found to apply even where a shorter operational lifetime is assumed for the L-category vehicle. (note: L-Category is defined as motorcycles, tricycles and ultra-light four-wheeled vehicles)

ePTW Registrations				
	2014	2020	2021	% Change
Total, all types	141		6,028	4175%
Sub 15kw		1,692	5,131	203%
Over 15kw		767	897	17%
MCIA / NMC				

Additionally, the Low Carbon Vehicle Partnership (LowCVP – now Zemo) commented in their report on Powered Light Vehicles (L-Category vehicles):

"The whole-life carbon footprint of PLVs compared to conventional passenger cars is expected to be significantly lower owing to their smaller size and weight. The PLV study has estimated the total life-cycle energy consumption of PLVs to be, typically, more than 25% lower than conventional passenger cars. ([Route to Tomorrow's Journeys MCIA](#))

In general terms, PTWs as a whole contribute very little to overall emissions from vehicles, as was noted by DEFRA in the 2017 [draft air quality control plan](#). This means as the UK moves towards the decarbonisation of road transport, motorcycles and scooters, particularly those compliant with the latest emissions standards, offer part of the 'pathway' towards a cleaner environment. It is also notable that older machines with often low fuel consumption, particularly in the commuter segment, can be part of the 'drive' to reduce Co2 emissions. The zero contribution of PTWs towards road congestion also helps towards this end, as PTWs spend less time on the road during a given commuter journey in particular

Probably the most significant issue for 2022 will be the Government's decarbonisation agenda. 2035 has been mooted as the target for the ending of motorcycle ICE (internal combustion engine) production, though dates could vary according to motorcycle type.

What little is known about the proposals so far has created huge concern among motorcyclists, not just here in the UK, but also across Europe as the EU also consider plans in this area. Two rider surveys ([MAG](#) and [FEMA](#)) have illustrated the strength of feeling that riders have about the issue, with a large proportion of riders surveyed opposing ICE phase-out. This is because of a wide variety of practical factors, given the current state of technology, but also because the proposals, as far as we know about them, represent a fundamental change to the heart and soul of motorcycling as we know it.

The situation has not been helped by the slow pace of engagement by the industry with technological change, with motorcycling now far behind the car sector when it comes to alternative powered products. The result is that confidence among riders that electric motorcycles can meet the diverse needs of riders remains very low, which in turn ‘fuels’ huge concerns about ICE phase out.

The NMC’s view is that technological change should be evolutionary and not set around ‘stretched’ and arbitrary targets far in advance of a global view that net zero – not absolute zero - should be reached by 2050. The NMC also takes the view that change should be technology neutral, allowing for a mixed economy of battery electric, hybrid, cleaner and synthetic fuel powered ICE among other technologies. In this, the Council has noted the position of the manufacturers themselves, as recently expressed in a [European industry conference in Brussels](#). Motorcycle manufacturers argue that industry should be left alone to innovate the best ways of reaching agreed net zero targets, through the use of various technologies.

Motorcycle manufacture is a global, not a domestic, concern and if the government ignores global developments in this area and insists on absolute zero to forced domestic targets instead of net zero to international targets, the result could be market and economic shocks as products simply disappear from the marketplace – and not just in the motorcycle world.

Motorcycle Safety. Time for Welcoming Roads

In recent years it has been noted by public authorities that the downward progress in overall road casualty numbers has ‘plateaued’. Several road safety bodies, including the [International Transport Forum and OECD](#) have considered this and what needs to be done to make further progress. The NMC’s view is that many traditional road safety techniques may be running out of steam in terms of what can be reasonably delivered in the future. A fresh approach is indicated, looking beyond what has worked before and how both policy levers and safety messaging should be evolved.

Safety is often cited as a reason to exclude PTWs from transport policy. Although it is true that motorcycles remain disproportionately represented in road collisions, deaths and serious injuries have fallen by 32% since 1993, with all casualties



falling by 50.1% over the same period. The overall casualty rate per mile fell by 21% between the 2010/14 baseline and 2019 – with no decrease in miles travelled. Fatalities fell by 5% during 2019. PTW deaths as a proportion of all traffic fatalities remains too high, but the 2019 data reveals that the proportion is reducing (all stats – DfT)

The Covid-19 pandemic effects on traffic use means that 2020 casualty data is unrepresentative of longer term trends, given that motorcycle traffic fell by 18.3% during the year, along with falls in traffic among other road user groups, aside from cycling.

Casualty numbers in 2020 fell across the board in terms of killed, plus serious and slight injuries. But notably, the rate of motorcycle deaths per mile travelled also fell by 5.24%. This is interesting, as a feature of the pandemic was the rise in prominence of motorcycle use for commuting and community support as illustrated above. This was reflected in the share of new commuter machines registered in 2020 as a proportion of all motorcycle sales.

The current road safety methodology is focussed on a Safe Systems approach with a goal of Vision Zero. The NMC fully supports a Safe Systems approach which takes into account all modes of road transport and proposes the ‘Welcoming Roads’ approach to road safety messaging and investment. [Welcoming Roads](#) takes a fresh approach to how Vision Zero is promoted and messaged. It builds upon the ‘Safe Systems’ core of Vision Zero and inclusively focuses on the safety of all road users, irrespective of how they choose to travel. The current Vision Zero message has been conflated with a drive to promote ‘active travel’ modes which has marginalised efforts to improve motorcyclists’ safety.

Motorcycling has also been marginalised by being ignored in transport and social policies. Motorcycling must be fully integrated into these policies, with proper recognition of motorcyclists’ needs resulting in appropriate planning to provide a better and safer environment for motorcycle and scooter use. Continuing to ignore riders needs in order to discourage motorcycle use benefits

Baseline and 2019				
Source: DfT	Number	-	% Change	% Change
	2010-14 Baseline Ave	2019	Baseline	versus 2018
Fatal	352	336	-4.55	-5
Serious	6,783	5,667	-16.45	-5.74
Slight	12,316	10,221	-17.01	-1.74
All Casualties	19,452	16,224	-16.60	-3.53
PTW Traffic (1)	2.88	3.00	4.17	0

DfT / NMC



no-one and is not an acceptable approach when use of micro-mobility devices such as e-scooters is being supported, despite their very questionable safety attributes, as outlined in a recent [PACTS report](#).

The sustainable route to safer motorcycling comes from taking a holistic approach to policy and practice, based on a 'shared responsibility' approach and inclusion within mainstream transport policy. This means recognising the role motorcycling provides within society and the transport system so that proper investment goes into motorcycle safety. The Organisation for Economic Cooperation and Development (OECD) made this key point in their primary recommendations from the [2008 Lillehammer safety conference](#).

This approach will open opportunities to further develop the already important role that motorcycling plays in transport. The 'plateau' in casualty reduction will be breached. Further information about the NMC's approach to a future road safety strategy can be found on the NMC website.

Mental Health and Quality of Life Benefits

Motorcycle use is linked with positive mental health attributes including quality of life enhancements and stress reduction. Many of those who ride improve their social interactions with others through being part of a group and motorcycling as a stand alone activity can bring great personal fulfilment, with many expanding their horizons through touring and attendance at events and through participation in other motorcycle related activities. Motorcycle tourism was valued at £526 million per annum in 2015 (ICF).

Motorcycling's mental health benefits have been the subject of various studies with those by the [University of California](#) and [Tohoku University](#), Japan being among the more notable.



Motorcycling can also provide physical health benefits. A study commissioned by the TRF (Comber 2016) found that 70% of all green road rides met the government recommended guidelines for moderate exercise, with many rides coming into the 'vigorous' category for exercise. For an average ride of 230 minutes, a trail rider spends approximately one quarter of their time with their average heart rate working in the vigorous range.

Part Three: Strategic Recommendations

As illustrated above, motorcycling represents a dynamic sector which, aside from being a viable alternative mode of transport and leisure enjoyed by over a million people today, also represents a notable contribution to society's vitality and the economy. Motorcycles are already contributing to a low carbon future and their wider use can accelerate progress towards this end. Traffic congestion and pollution can be cut at a stroke through modal shift to commuter motorcycles right now. Safety remains a key issue, though steady improvements over recent decades need wider recognition. Further progress will rely on a more holistic view to be taken of road safety.

The stereotypes often attached to the idea of motorcycle use are no longer appropriate. Behavioural issues exist among a small minority of users of all modes of private transport, including cycling and this will continue to need to be addressed via appropriate action.

1. Policy.

- The first step will be to recognise the role of motorcycles and scooters in transport policy as a sustainable alternative for travel. From this, other initiatives will flow that will see the mode of transport accepted at a policy and planning level. Assuming that motorised transport factors are universal and apply equally to all forms of motorised transport is a mistake. From parking provision to the need for charging facilities for electric PTWs, the needs for motorcycles and cars are different. Guidance should also be provided for inclusion of motorcycling in travel plans. Just as with other forms of sustainable transport, motorcycling needs to be fully integrated into the planning process and considerations for travel to and from any new development.
- Planning policy should include a comprehensive consideration of motorcyclists, their needs and requirements. By embedding this consideration at initial stages, synergies between cycling and motorcycling can be introduced to deliver infrastructure that delivers for both modes at considerably less cost. The ability to deliver private motorised transport in a more sustainable way will equally influence spatial planning decisions by removing the restrictions imposed due to relying solely on active travel and public transport. These considerations do not remove the need to consider these factors, but rather complement and enhance the choices available to planners.

2. Economic, Environmental and Technical.

- Tens of thousands of jobs are supported both directly and indirectly by both the motorcycle industry and those who use their products. These jobs should be supported by full recognition of the economic role that motorcycling plays and the important skills that the UK has in this industrial sector. This can be done via a range of other initiatives that support British industry by also including the motorcycle sector in their targeting.
- The UK has significant motorcycling cultural heritage and this should be placed at the heart of the 'Great Britain' campaign.

In addition to Triumph, other iconic British-originated brands are re-emerging with a focus on both traditional markets and new technologies. They should be offered necessary support and championed as part of the UK's ambition to 'Build Back Better'.

- Developments of advanced technologies such as telematics applications, driverless vehicles and other related initiatives need to include a consideration of their impact on motorcycles as part of core R&D. This to both ensure safety and also to make sure that motorcycles are recognised when such technologies are used in practice.

3. Licensing.

- Successive EU regulations via Driving Licence Directives have focussed on creating complex and bureaucratic obstacles to those who wish to gain a motorcycle licence. This has been done in the name of safety, but the claimed gains here are questionable and the currently applied EU rules seem more designed to discourage motorcycle use. New UK motorcycle training and testing laws should seek to 'de-complicate' training and testing while maintaining high standards. As a minimum, single event motorcycle testing should return, the repetition of the same test to move between motorcycle licensing categories abolished and elements of previous licensing regimes which led to genuine and demonstrable casualty reductions, reinstated. The NMC has published a comprehensive position on [motorcycle training and testing](#)

4. Access.

- In common with cyclists, motorcyclists naturally display both a will and ability to access all parts of available road space. This should be both normalised and encouraged, as a means to increase the congestion-busting aspect of motorcycling and its inherent benefits, and also to increase safety for riders. The segregation of road space in the form of bus lanes, some types of cycle 'highway' and advanced stop lines brings benefits to those permitted access to that space. The inclusion of motorcycles in the list of permitted vehicles is, in all cases, beneficial to riders without impacting other user groups or diminishing the intended benefit to those groups. Exclusion of riders from these segregated areas pushes riders into increased conflict with cars and other heavy vehicles whilst simultaneously diminishing the benefits yielded from the filtering capability of motorcycles in congested locations.

Misuse of Traffic Regulation Order (TRO) powers is a chronic problem that has become acute during the Covid-19 crisis as a way of reallocating road space to non-motorised modes of transport and to create 'safe and quiet spaces' for walkers and cyclists. Other TRO proposals have started to appear on minor, often rural tarmac roads, with unusual features such as fords. These 'sealed roads' TRO proposals appear often without adequate consultation of all groups affected.

Safeguards within the TRO legislation have been steadily eroded to the point where they no longer provide meaningful protection, with TRO's being made with selective procedural



failings. The current safeguards are wholly inadequate to protect the interests of road users and the wider public. Our road network is the nation's most valuable asset that still remains in public ownership, yet all too often the public are banned from using their own roads in consequence of lobbying by a minority of local residents and/or anti-motoring pressure groups. It can be argued that this is an unintended consequence of localism, which in the case of traffic issues has operated to elevate the minority interests of a few specific interests to a special position, to the detriment of the majority interest of the wider road using public.

What is needed is a less restrictive approach that has adequate legislative safeguards for proportionality and propriety. A principle of 'Welcoming Roads' needs to be adopted, where there is better recognition of different classes of traffic being equally entitled to legitimately use roads, rather than elevating the interests of one class of road user over another. Such recognition of equal entitlement, coupled with full and transparent consultation on all TROs, should form the basis of favouring 'shared space' road schemes on such roads, to cater for the choices of all road users in a fair and impartial way and to promote inclusivity where decisions about safety and the environment are taken in partnership with those users affected.

5. Wellbeing

- Just as with cycling, the activity of motorcycling is also a leisure activity for many. There are wider social benefits of motorcycling as a leisure activity. By acknowledging and supporting the role of riding for leisure (and economically beneficial tourism), there will be a natural translation to the benefits of modal shift to motorcycling for commuting. The health and wellbeing benefits that arise from riding will translate into the daily commute, where currently the car is the only option available to those for whom walking, cycling or public transport are not viable.

6. Barriers to Modal Shift

- There are a number of barriers to modal shift to motorcycles, even amongst those that are looking to make this behavioural change. These include theft, parking and safety. To be effective in promoting modal shift to motorcycles,

these barriers must be identified, examined and removed. Theft is closely related to parking. Many existing riders will be discouraged from riding into major metropolitan areas as a result of the fear of motorcycle theft in those areas. One immediate solution to this theft issue is the provision of fit-for-purpose secure parking facilities.

Road casualty statistics, selectively used, are often quoted as a reason to discourage motorcycling. This attitude needs to be reassessed. Studies have shown that the simple act of increasing the prevalence of motorcycles on the roads will in itself reduce the risk of collisions occurring. The concept of safety in numbers is widely accepted for the cycling community, but needs to be applied to the motorcycle transport mode. A fresh approach to motorcycle road safety needs to expand to increased training and awareness of motorcyclists' needs and vulnerabilities among other road users.

7. Heritage Protection

- The classic motorcycle sector is a significant contributor to the UK economy. It was estimated in 2019 that there were 674,592 classic motorcycles with an estimated value of nearly £1.2 billion (HERO-ERA doc). Given that many older motorcycles have good fuel economy, classic motorcycles often have very low Co2 outputs. Keeping an existing motorcycle on the road throughout its full life cycles is preferable to manufacturing a replacement, for example an electric alternative, as the production of these vehicles causes high CO2 emissions (ZEMO LCA study).

As an important part of the UK's cultural heritage, that occupies a notable economic profile, the heritage motorcycle sector should enjoy protections, ensuring that full access to roads and fuels remains.

Part Four: Unlocking Motorcycling's Potential – Further Detail

The policies below set out the key points and pathways of progress towards unlocking the potential that motorcycling offers. They form the key points which will underpin a strategic approach to transport policy and motorcycling's place within this.

1. Positive position for motorcycling in transport policy

Objectives:

Bring motorcycling into the mainstream of transport. This to be achieved by the full integration of motorcycling policy into wider policy areas, fully recognised and facilitated as a legitimate form of transport for commuting, logistics and leisure activity, which covers the three aspects of sustainability (Economic / Social / Environmental)

Actions Needed:

- A dedicated motorcycling responsibility to be added to the list of areas covered by DfT Directorates, with a mandate to work across government departments.
- Government to create strategic policies for motorcycling, which positively recognises the mode alongside other two wheeled transport. Create a motorcycle policy delivery mechanism, with accompanying investment strategy. Create accountability for delivery at national and local levels.
- Motorcycling access to bus lanes by default, plus certain other dedicated lanes
- Access to all parts of the road network (sealed and unsealed roads) regardless of age of motorcycle
- Promote measures to reduce theft and encourage commuting, including secure parking.
- Policies to incentivise a switch to motorcycles for commuting
- The promotion of motorcycles as transport for remote rural communities, providing more active support for schemes such as 'Wheels 2 Work'
- Motorcycling's inclusion in employers' 'travel-to-work' plans
- Appointment of a national PTW 'Czar' or champion.
- Improving the use of statutory regulation of traffic (Public Space Protection Orders / Traffic Regulation Orders), though the more transparent development of regulations and guidelines which do not discriminate against legitimate motorcycle use and are subject to more democratic oversight.

2. Future transport, decarbonisation & new technologies

Objectives:

- Motorcyclists groups to have a voice on decarbonisation timetables, process and legacy protections. Low polluting current motorcycle types to be encouraged as part of the Transport Decarbonisation Plan, given that reductions in transport Co2 can be achieved right now by a modal shift to motorcycling right now. Move towards global net zero targets in a manner which can make the best use of current

and future technologies, while recognising motorcycling's positive role. Charging infrastructure to include provision for electric motorcycles. All new vehicle and traffic management technologies for different vehicle types need to be developed taking account of motorcycles.

Actions Needed:

- A technology neutral approach is needed – There must not just be a focus on battery electric, but also on synthetic and alternative ICE fuels, hydrogen power and other technologies.
- There should be no arbitrary dates for phasing out ICE motorcycles. Decarbonisation will need to be evolutionary and not just focussed on battery electric. Government to work closely with motorcyclists' interests on future planning.
- No ban on the use of existing ICE motorcycles. Machines sold with current ICE technologies to be allowed to run the course of their lifecycles. There need to be protections for heritage motorcycling.
- No restrictions on road space access for motorcycles given their low polluting and zero congesting attributes, meaning that significant transport Co2 reduction can be achieved though their use.
- All developments in the area of connected and autonomous Vehicles to feature work on impacts on motorcycles, with motorcycling experts included in research and R&D phases, plus on any government policy committees or task forces in this area.
- Regulations and legislation on electric vehicle chargepoints to mandate a requirement for all EV battery charging installations to have charge station technology which is compatible with electric motorcycles.

3. Motorcycle access to both urban and rural areas, including green roads and protection of sport venues

Objectives:

- A less restrictive approach to Traffic Regulation Orders applied that has adequate legislative safeguards for proportionality. A principle of 'Welcoming Roads' adopted, where there is better recognition of different classes of traffic being equally entitled to legitimately use roads. This coupled with full and transparent consultation on all TROs to ensure the choices of all road users are recognised in a fair and impartial way. Vehicle access to National Parks and AONBs to be retained.

Actions Needed:

- A recognition of responsible and sustainable motorcycling access, stopping TROs and other regulations that restrict access to urban areas, the countryside on both tarmac and green roads.
- Recognition of the Green Road Map by government
- Continued land access for sporting events, regulatory matters to secure this and related items (Including a better approach to Authorising Bodies and the Road Traffic Act).

- Improved environmental and heritage protection of green roads and minor tarmac roads, to secure the social, environmental and heritage benefits of motorcycling.
- A reversal of Covid-19 related road closures where these can be shown to be disproportionate.
- Transparent and ethical regulation by local authorities
- Removal of road space restrictions and access to road space where such measures increase motorcycle rider vulnerability and reduce the ability to access homes, work and other destinations
- Full and unconditional access by motorcycles to low emission zones.
- Introduction of meaningful safeguards for rationality and proportionality in the application of legislation and statutory regulation that affects motorcycling.

4. Utilise the benefits of motorcycles in the context of 3 pillar sustainability model (economic/social/environmental)

Objectives:

- A recognition of motorcycling's benefits under the 3-pillar model. Numerous studies demonstrate that they both congest and pollute less, or not at all. Journey times are reduced and they are cost effective to use. The motorcycling sector also contributes notably to the UK economy and motorcycle use can aid mobility, accessibility, equality of opportunity, access to work and education and improve quality of life.

Actions Needed:

- Expansion of Wheels 2 Work
- Work to be done to develop ways to further understand and maximise the established benefits (effects on traffic congestion/pollution, mobility/journey times, social/educational and employment factors, cost factors).
- Support further studies into motorcycling and mental health, plus their physical health benefits
- Update knowledge on the positive economic impacts of motorcycle use (both motorcycle economy and wider economy), including motorcycle sport

5. Road safety and licensing – position motorcycling within the Safe System and the UN Five Pillars and introduce a fair rider licensing regime

Objectives:

- Fewer motorcycle deaths and serious injuries. This to be achieved by reappraising Vision Zero messaging to create a more inclusive approach to both safety policy and investment. Road safety support and investment to apply equally across all transport modes. Public messaging must be evolved so that it can bring more people 'on board' with key road safety objectives.
- Given the mixed safety impacts of changes to licensing and testing since 2009, government to initiate a fresh appraisal of the UK licensing regime, taking account of recommendations made by the NMC. Government to offer more support for post test training and to discuss support for BikeSafe.

Actions Needed:

- Government to adopt the principles of the 'Welcoming Roads' philosophy.
- Government to initiate a review of the UK's licensing training and testing regime
- Government to offer more support for post-test training initiatives. There is also a need to discuss with BikeSafe how best to support that initiative and also to help boost publicity for post-test initiatives such as 'Unlock your freedom'.
- The new Road Casualties Investigation Branch to conduct proper levels of 'on site' collision investigation and to offer focus on the causes of motorcycle collisions.
- Protective equipment:- in addition to current work updating the SHARP initiative, government to support a rider information campaign to highlight standards in protective clothing – important given the switch from CE standards to UKCA.
- A new focus on a deeper analysis of motorcycle safety statistics, including a return to the DfT annual compendium of motorcycle statistics.
- Theory test and hazard perception: Change the theory test to include questions covering all modes of transport and include a wider variety of scenarios in the hazard perception portion of the test.
- Infrastructure: Government to support a revision and update of the Institute of Highways Engineers Motorcycle Guidelines. Ensure that road design never compromises motorcycle rider safety and entitlement to ride.

6. The position of motorcycling in a range of regulatory, technical and enforcement areas

Objectives:

- With the UK's exit from the EU, opportunities exist to redefine a range of technical regulatory areas. However, these need to be recognisant of and sit alongside a range of global technical standards set by the EU and other territories. This is essential to maintain consumer choice by not erecting barriers to the UK market, or to interfere with rider choice regarding modification and replacement component choice. All new measures must be developed in full consultation with motorcycling organisations. This theme covers a very wide range of regulations, technical, in-use regulations, taxation, trade and enforcement. The actions below represent areas where the Government is called upon to act, or to discuss further with motorcyclists' groups the most appropriate way forward.

Actions Needed:

- Anti-tampering. The freedom to modify motorcycles must remain. Government to work with the NMC and its members on how best to deal with current anti tampering regulations and to identify clearly defined specifics where any further regulation may be indicated.
- Government to include the NMC in pre consultation discussions about regulatory changes affecting motorcycling that arise from EU-Exit.
- The Transport Regulatory Review, will need to consider a clearer definition of what a 'motorcycle' is, given the

emergence of 'novel' forms of transport.

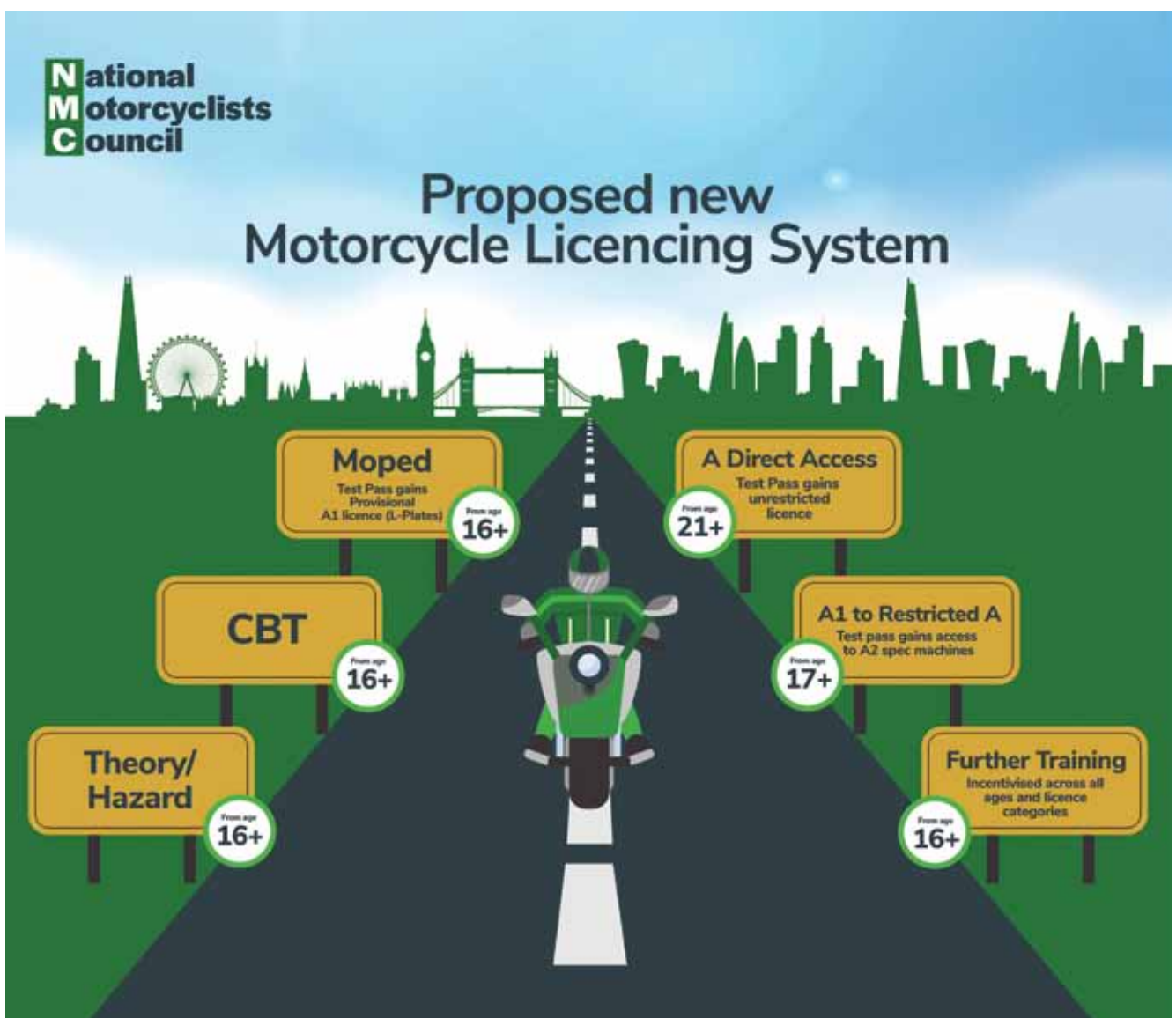
- Powered Transporter regulation needs to be clearly defined, in order to ensure that only safe and properly regulated products are used on UK roads.
- Planning law to be reviewed in the context of fair access to green roads and minor tarmacked roads (see above)
- Any evolution of vehicle taxation to offer clear benefits for modal shift to motorcycling.
- Motorcycle Noise and anti-social use. Government to support rider group efforts to encourage a socially responsible culture across the whole of the motorcycle community
- A renewed focus on tackling motorcycle theft and improving security.
- Work with the EU to establish clear rules on shipping motorcycles to and from the EU.

Actions Needed:

- No banning or charging classics in LEZs
- Continued unrestricted access to highways network, both tarmac and green roads
- Continued access to appropriate fuels
- Continuation of 40 year 'historic vehicle' status
- A recognition of the full economic benefit of UK motorcycling heritage
- Better protections required for heritage venues and access.

7. Protection of motorcycling's heritage

- Objectives: As an important part of the UK's cultural heritage, that occupies a notable economic profile, the heritage motorcycle sector should enjoy protections, ensuring that full access to roads and fuels remains.



Who are the NMC

National **M**otorcyclists **C**ouncil

The National Motorcyclists Council (NMC) is a coalition of motorcycling representative organisations, which works together on commonly held positions about issues where motorcyclists seek to change or influence government policy. It also researches issues to both inform campaigning and support the individual work of its members.

The NMC's mission:

'Working together to help assure a positive and sustainable future for motorcycling'

The NMC brings together a broad spectrum of representative national motorcyclists organisations. These range from riders campaign groups, motorcycle sport representatives, off road and green roads interests, training organisations, the motorcycle trade and insurance service sector.

The NMC's members are: The Auto Cycle Union, the British Motorcyclists Federation, IAM RoadSmart, the National Motorcycle Dealers Association, Plantec Assist and the Trail Riders Fellowship.



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Compendium of Resource Links.

The list of linked resources below is a compilation of items referred to in this document. Other links to useful resources are also included.

- **DfT Road Safety Data**
<https://data.gov.uk/dataset/cb7ae6f0-4be6-4935-9277-47e5ce24a11f/road-safety-data>
- **DfT Motorcycle Fact Sheet**
<https://www.gov.uk/government/statistics/reported-road-casualties-great-britain-motorcyclist-factsheet-2020/reported-road-casualties-in-great-britain-motorcycle-factsheet-2020>
- **Road Casualties Great Britain DfT**
<https://www.gov.uk/government/statistics/reported-road-casualties-great-britain-annual-report-2020/reported-road-casualties-great-britain-annual-report-2020>
- **National Travel Survey DfT**
<https://www.gov.uk/government/collections/national-travel-survey-statistics>
- **IHE Motorcycle Guidelines**
<https://www.motorcycleguidelines.org.uk/wp-content/uploads/2013/08/IHE-Guidelines-for-Motorcycling-Introduction.pdf>
- **TfL Urban Motorcycle Design Handbook**
<https://content.tfl.gov.uk/tfl-urban-motorcycle-design-handbook.pdf>
- **TfL Motorcycling in London:**
<https://tfl.gov.uk/travel-information/safety/road-safety-advice/motorcycling-in-london>
- **Post test motorcycle training**
www.iamroadsmart.com
- **Motor Cycle Industry Association market information**
<https://www.mcia.co.uk/press-statistics>
- **Welcoming Roads**
<https://www.uknmc.org/news/welcoming-roads-a-fresh-vision-for-vision-zero>
- **PACTS report on e-scooter safety**
<https://www.pacts.org.uk/wp-content/uploads/PACTS-The-safety-of-private-e-scooters-in-the-UK-Report-5.0.pdf>
- **ITF/OECD motorcycle safety report 2008**
<https://www.itf-oecd.org/sites/default/files/docs/lillehammer08finalreport.pdf>
- **Motorcycles and Stress reduction University of California**
- **Motorcycles and cognitive function**
https://www.jstage.jst.go.jp/article/jsaeijae/5/2/5_20144193/_pdf
- **NMC position on motorcycle testing and training**
<https://www.uknmc.org/news/motorcycling-licensing-nmc-calls-for-change-to-improve-road-safety>
- **Motorcycle Use in England – National Travel Survey 2016**
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/694965/motorcycle-use-in-england.pdf
- **Motorcycle Industry Market Data**
<https://www.mcia.co.uk/pocket-guide>
- **Oxford Economics report on motorcycling (ACEM) 2021**
https://acem.eu/images/publiq/2021/Oxford_Economics_-_The_economic_importance_of_motorcycle_to_Europe.pdf
- **ICF report on the economic benefits of the motorcycle industry 2014**
https://www.trf.org.uk/members-area/trail-magazines/doc_download/3111-economic-benefits-of-the-uk-motorcycle-industry-2014.html
- **The Economic and Environmental Impact of the Historic and Classic Motor Industry**
<https://www.herostore.eu/historic-motoring-impact-study.html>
- **Bike Shed Covid-19 initiative Bike Shed Community Response**
<https://bikeshedmoto.com/blogs/blog/>
- **Zemo motorcycle life cycle report**
<https://www.mcia.co.uk/downloads/download/644>
- **Leuven study into motorcycles and commuting**
<https://www.tmlleuven.be/en/project/motorcyclesandcommuting>
- **Report on motorcycling and mobility in Paris**
<https://www.acem.eu/component/phocadownload/category/3-mobility?download=8:the-contribution-of-two-wheel-motor-vehicles-to-mobility-in-a-big-city-the-case-of-paris-pierre-kopp-paris-2009>
- **MCIA Route to Tomorrow's Journeys**
<https://www.mcia.co.uk/downloads/download/189>
- **MCIA Realising the Motorcycling Opportunity**
<https://motorcycleminds.org/virtuallibrary/strategies/motorcyclesafetyframework-1116.pdf>
- **DEFRA Air Quality Plan**
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/633270/air-quality-plan-detail.pdf
- **MAG UK petrol motorcycle survey**
<https://www.mag-uk.org/mag-publishes-petrol-motorcycle-survey-results/>
- **FEMA petrol motorcycle survey**
<https://www.femamotorcycling.eu/motorcyclists-say-no-to-ban/>
- **European motorcycle industry 2030 vision**
<https://www.acem.eu/acem-presents-vision-2030-its-vision-of-the-future-of-motorcycling-in-europe-for-2030-and-beyond>
- **ITF/OECD motorcycle workshop**
<https://www.itf-oecd.org/motorcyclists-safety-workshop-riding-safe-system-closing-plenary>
- **Economic value of UK motorcycle sport 2014**
https://assets.website-files.com/60364ce44148d168e4193d50/61f9435217889ea5c3faac0c_MCSportValues%202014%20MSPG.pdf
- **Economic value of UK trail riding 2016**
https://assets.website-files.com/60364ce44148d168e4193d50/61f93eea3e141a9f443f0a69_TRF%20Economic%20Value%20of%20Trail%20Riding%202017.pdf
- **Health Benefits of Trail Riding**
https://assets.website-files.com/60364ce44148d168e4193d50/61f93f4cfd6d8784b533c0d6_Health-Benefits-Documents-FINAL-01.pdf
- **2019 Road Safety Statement.**
<https://www.gov.uk/government/publications/road-safety-statement-2019-a-lifetime-of-road-safety>

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