WHO RIDES LONDON?

A survey of motorcyclists who use PTWs to ride to work in London

Dr Elaine Hardy, Motorcycle Research Analyst

8th June 2018

ULEZ and PTWs in London

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Executive Summary

An online survey was carried out between March and May 2018 (six weeks), focusing on motorcyclists who typically ride PTWs (motorcycles, scooters or mopeds) to work within the proposed ULEZ (Ultra Low Emission Zone) areas of London. There are two defined areas, the first which comes into operation in April, 2019 and is confined within the Congestion Charging zone and the second which comes into operation in October 2021 which covers Greater London up to the Northern Circular and South Circular roads.

The survey was a study to identify specific issues relating to PTWs which fall within the Euro 3 emission standards (PTWs manufactured from 2007 onwards) or pre Euro 3 emission standards (PTWs manufactured prior to 2007) which would thus incur a charge of £12.50[1].

There were n.420 responses to the survey, n.245 replied that they worked within the Congestion Charge zone (designated as the ULEZ in 2019) and n.109 worked in the Greater London area (designated as the ULEZ in 2021). There were n.36 riders who worked outside London, but indicated that they frequently travelled into London.

Overall, of the riders who work in the Congestion Charge zone, 43% (n.105/n.245) replied that they have pre Euro 3 PTWs, while 53% (n.129/n.245) have Euro 3 standard PTWs. The riders working in the Greater London area – i.e. outside the Congestion Charge zone, but within the proposed ULEZ to be introduced in 2021, who replied to the survey, were n.109/n.420 of whom n.43 (39%) replied that they owned pre Euro 3 PTWs and n.62 (57%) owned Euro 3 standard PTWs.

Although low wages is in part supported by some of the comments from riders who own pre Euro 3 PTWs and work in the inner London Congestion charge zone, it is not the more predominant reason of the riders who replied to the survey for using this standard of PTW (nor the Euro 3 standard PTWs) to travel to work.

The factors indicated in the comments of the riders relate to time and travel cost. In other words, PTWs enable the rider to cut travel time considerably, from 2 to 3 hours using public transport to half an hour, at least half the time of using a car or van. Furthermore, the cost of travelling is considerably less than using a car or public transport.

Other reasons include the unreliability of public transport; for those working shifts, similarly, the unavailability of public transport. In some instances, riders who have to travel into London indicated that the overall cost and time consumed to get to train

[1] This excludes historic PTWs which were manufactured prior to 1973

stations or bus stops far outweighed the use of PTWs. They also indicated that the trains in particular were frequently late or cancelled.

There is a major problem in London with the theft of PTWs with over 14,000 thefts identified London in 2017 (11% of PTWs registered in the London area). Riders have every reason to be concerned and have a strong case to present to exempt the ULEZ charges for older PTWs. Because an analysis of Motorcycle Theft in London[2], indicates that the main reason motorcycles are stolen is for spare parts.

By examining the information from the survey, the majority of PTWs used by the respondents are Naked (standard) motorcycles or Adventure types. As these bikes (especially the newer models) are targeted by criminals for spare parts, the solutions to prevent the theft of these vehicles include better parking facilities *"but also using old battered up bikes for commuting to deter the discerning thief"*[3].

It is a paradox that the Mayor's Office is looking for solutions to prevent the high levels of theft by denying access to London through the high daily charges for riders who choose to ride pre Euro 3 bikes in consideration of the fact that these older PTWs are less attractive to thieves.

Whether the answer is exemption from the charge altogether or a proportionate charge in consideration of the fact that the overall usage of Pre Euro 3 PTWs is less in comparison to Euro 3 standard PTWs.

The fundamental argument, as demonstrated from other studies in Europe, is that PTWs use far less travel time and are far less likely to be held up in traffic jams. Thus in real terms, the pre Euro 3 PTWs would pollute less in comparison with four wheeled vehicles that are compliant with the later 4 and 5 Euro standards, especially diesel fuelled vehicles, simply because they are not standing idle for the lengths of time that cars, vans, lorries and buses are.

It would not be beyond the realms of the authorities of London to look again and consider that a solution can be found with what should be a reasonable and realistic compromise.

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[2] http://www.fim-publicaffairs.com/en/analysis/motorcycles-crime-and-silver-bullets/541
[3] http://www.fim-publicaffairs.com/en/analysis/motorcycles-crime-and-silver-bullets/541

Contents **Page No.**

Introduction

A charge of £12.50 per day for older (than the Euro 3 standard: 2007 onwards) motorcycles/scooters/mopeds traveling in a proposed Ultra Low Emission Zone (ULEZ) in London has been decided by the Transport for London authority. This was followed by a consultation regarding this daily charge about a year ago. The motorcycling community started raising concerns and has been challenging this proposed charge since then.

The argument put forward by the motorcycling community and industry is that whatever the riders' circumstances are, the charges are discriminatory, disproportionate and unwarranted. The motorcycling community has pointed out that these charges should not be introduced for a mode of transport that has the benefits of reducing congestion and which in terms of pollution, has a minor impact, especially compared to other private and public forms of transport. These assertions need supporting evidence in order to justify free access or lower charges (compared to four wheeled vehicles) to London by the London transport authorities.

The survey "Who Rides London?" aims to identify motorcycle, scooter and moped riders who typically commute to work or study in London either in the Congestion charge zone which will become the ULEZ in 2019 as well as to the second ULEZ which will be introduced in 2021, to determine the typical riders' profile and the type of bikes/scooters/mopeds travelling in these areas.

The results will hopefully offer the opportunity to put forward evidence that offers both the London authorities and riders the basis of discussions for those who will be affected by the proposed charges to be introduced in London.

Facts

It is useful to understand a few basic facts – which are:

- There were 125,200 motorcycles, scooters and mopeds registered in London in 2016,[4] with an estimated 55,000 riding every day, which suggests that there is a very important place for motorised two wheeled transport in London.
- As recognised by Transport for London in a report published in March, 2016.[5]
- In that respect, a paper by MAG UK, published in 2005 but still very relevant today, highlights the benefits of Powered Two Wheelers in Local Transport Plans.[6]
- The charges refer to motorcycles, scooters and mopeds which are older than the Euro 3 standard (2006/2007), the reason is that motorcycles older than this standard, pollute considerably in comparison. According to ACEM (the European Motorcycle Manufacturers' Association), there has been a 94% reduction of carbon monoxide and hydrocarbon emissions, and a 50 % reduction of nitrogen emissions since the introduction of Euro standards in 1999.[7]
- The introduction of the ULEZ zones is not just in London, in fact these zones are being, or have been introduced in major capital cities throughout Europe, indeed, hundreds of European cities already have vehicle entry regulations, depending on vehicle emission standards, payment or vehicle type. Some cities ban certain

[4] https://www.gov.uk/government/statistical-data-sets/veh03

[5] https://www.london.gov.uk/sites/default/files/easy_rider_improving_motorcycle_safety2.pdf

[6] http://www.mag-uk.org/content/campaigns/motoinclusion/ltp-maguk.pdf

[7] https://www.acem.eu/images/publiq/2018/Riding-in-a-21st-century-environment.pdf

vehicles, others allow entry of vehicles in LEZs during certain periods during the day/night, while others such as London, charge.[8]

- The last study to profile the typical London rider was carried out by Transport for London through the University of Leeds back in 2004. The study using postcode data, was divided into n.112 motorcyclists who resided in Greater London and 867 who lived elsewhere. The data suggested that London motorcyclists are more likely to be younger and single, with full-time jobs earning a higher income. They are more likely to own machines under 250cc, compared to the rest of the sample, and much more likely to own scooters[9]. That study is now 14 years old and times change. Also the sample size was limited to only 112 riders in London.
- The motorcyclists participating in the survey mainly live in London, but more importantly n.381 replied that they worked in London. In total n.420 motorcyclists replied to the survey (although n.416 completed it). In n.20 cases the motorcyclists only partially replied, but there was sufficient information to be included in the analysis.

This study is being carried out by Dr Elaine Hardy, an independent research analyst with considerable experience of motorcycle related research topics

Aims

The study aims to identify the profile of London riders who typically commute and who either live and/or work within the ULEZs destined to incur a charge of £12.50 from 2019 for the inner zone – now the Congestion Charge zone and later for the second phase in 2021 which extends to the Greater London area. Throughout the survey we used the generic term "PTW" (Powered Two Wheeler), for convenience.

Objective

The objective of the survey was to find out from riders, their social profile and place of work within London to identify how many riders would be affected either due to the age of their PTW or their earnings with regards the proposed ULEZ charges. .

Methodology

An online survey was disseminated through magazines, Facebook, motorcycle forums and web sites. The following organisations promoted the survey:

- London Road Safety Council – Who rides London?
- 2WheelsLondon.com - Survey asks 'Who Rides London?'
- Survival Skills - Help With A Survey
- The Riders Digest - If you ride a bike – and in particular if you ride one in London
- Visordown - Who rides London? Survey to profile two-wheeler use in the capital
- The Motorcycle Theft Protest Community & Group (Closed page on Facebook)
- The British Motorcyclists Federation (BMF) - Ride in London?
- Several individuals who shared the survey through Social Media.

[8] http://urbanaccessregulations.eu/

[9] http://content.tfl.gov.uk/london-motorcyclists-final-version.pdf

A total of ten questions were asked. The first section covered requests for information about the respondent's personal details including age, gender, employment status and earnings, post code of where they lived and where they worked. A further section requested information about the motorcycle i.e. make, model, year of manufacture and engine size.

The respondent was also asked to provide comments and further details if required (see Annex one).

All information is confidential and no personal identifying questions regarding the rider or the motorcycle/scooter/moped were asked. The analysis of the survey was carried out using SPSS software and Microsoft Excel. See Annex two for details of the questionnaire.

Personal Information

1. Age of Riders

There were n.415 riders who replied to this question, the average (mean) age of the riders who answered the survey was 46.8 years; the youngest was 20 years and the oldest 76 years.

Table one Age of Riders

Age	Frequency	Percent
N/a	5	1.2
20 to 25	16	3.8
26 to 35	71	16.9
36 to 45	89	21.2
46 to 55	133	31.7
56 to 65	96	22.9
> 65	10	2.4
Total	**420**	**100.0**

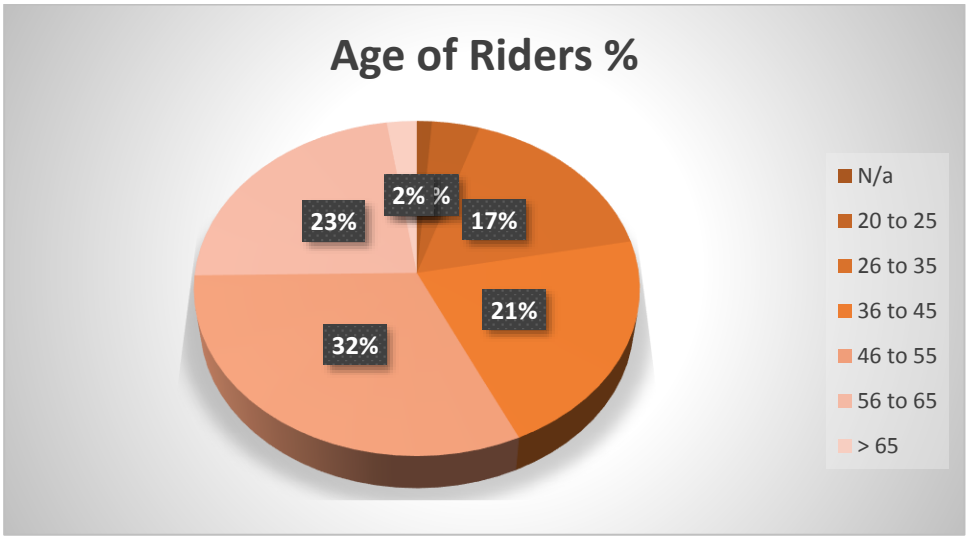

Figure 1: Age of Rider

2. Gender

Of the n.419 who replied to this question, there were n.46 (11%) responses from females, the remaining n.373 (89%) were males.

3. Employment status

Table 2 indicates that riders with fulltime employment and self-employment represented the greatest proportion of respondents – n.354/n.420 (84.3%). 5.5% (n.23/n.420) were retired, while n.15/n.420 (3.6%) were employed part time. There were n.9/n.420 (2.1%) who were fulltime students. The remainder represented 4.3% of the respondents.

Table 2 Employment Status

Employment	Frequency	Percent
N/a	1	.2
Disabled (employed fulltime)	5	1.2
Disabled (employed part time)	3	.7
Disabled (not employed)	3	.7
Employed fulltime	277	66.0
Employed part time	15	3.6
Not employed	3	.7
Other	4	1.0
Retired	23	5.5
Self employed	77	18.3
Student fulltime	9	2.1
Total	420	100.0

4. Earnings

The riders who provided information about their earnings highlights that n.307/n.420 (55.4%) earn between £20,001 up to more than £50,000, the biggest group was those earning more than £50,000 (n.114/n.420) 27.1%. Those earning £20,000 or less represent 18.1% (n.76/n.420). There were n.15/n.420) with pensions, student loans and DSS benefits and "other", equal to 3.5% of riders. N.B: n.22/n.420) did not respond to this question.

Table 3: Earnings of Riders

Earnings	Frequency	Percent
N/a	22	5.2
< £10,000	15	3.6
£10,001 - £20,000	61	14.5
£20,001 - £30,000	74	17.6
£30,001 - £40,000	68	16.2
£40,001 - £50,000	51	12.1
> £50,000	114	27.1
Pension	9	2.1
Student loan	3	0.7
DSS benefits	2	0.5
Other	1	0.2
Total	420	100.0

Table 4: Comparison of Type of Employment with Earnings

Employment	Earnings											
	N/a	< £10k	£10k+ - £20k	£20k+ - £30k	£30k+ - £40k	£40k+ - £50k	> £50k	a (O)	b (P)	c (SL)	d (UB)	Total
N/a	0	0	0	0	0	1	0	0	0	0	0	1
Disabled (employed fulltime)	0	1	1	0	1	2	0	0	0	0	0	5
Disabled (employed part time)	0	1	1	0	0	0	0	0	0	0	1	3
Disabled (not employed)	1	1	0	0	0	0	0	1	0	0	0	3
Employed fulltime	13	4	24	48	56	37	95	0	0	0	0	277
Employed part time	0	3	6	3	1	1	1	0	0	0	0	15
Not employed	2	0	0	0	0	0	0	0	0	0	1	3
Other	1	0	2	1	0	0	0	0	0	0	0	4
Retired	0	0	8	6	1	0	0	0	8	0	0	23
Self employed	4	3	18	14	9	10	18	0	1	0	0	77
Student fulltime	1	2	1	2	0	0	0	0	0	3	0	9
Total	22	15	61	74	68	51	114	1	9	3	2	420

N.B.: a (O) = Other); b (P) = Pension; c (SL) = Student Loan; d (UB) = DSS benefits.
£10k+ = £10,001; £20k+ = £20,001; £30k+ = £30,001; £40k+ = £40,001.

5. Comparison of earning with PTW emission standards

Overall, table 5 below indicates that those earning over £50,000 represented the largest group of riders with n.114/n.416 (27.4%), for both standards of PTWs (Pre Euro 3 19.8%; Euro 3 34.2%) those earning between £20,001 and £30,000 represented n.73/n.416 (17.5%). The group that earned the least (less than £10,000) also represented the smallest group of riders in the survey: n.15/n.416 (3.6%), equally those who responded that they received pensions, DSS (unemployment) benefits, student loans or “other” represented the same proportion (3.6%) This is followed by those earning between £10,001 and £20,000 with n.53/n.416 (13.9%).

Table 5: Comparison of earnings to year of manufacture of PTW

N.B. There were 4 PTWs older than 1973, but these are historic vehicles and do not need to pay the ULEZ charges so not included in this table	Year of PTW Manufacture							
	N/A	%	Pre Euro3 1973-2006	%	Euro 3 2007-2018	%	Total	%
N/A	3	15.0	9	5.1	10	4.6	22	5.3
< £10,000	0	0.0	12	6.8	3	1.4	15	3.6
£10,001 - £20,000	5	25.0	33	18.6	20	9.1	53	13.9
Sub Total	**5**	**25.0**	**45**	**25.4**	**23**	**10.5**	**68**	**17.5**
£20,001 - £30,000	3	15.0	33	18.6	37	16.9	73	17.5
£30,001 - £40,000	3	15.0	24	13.6	41	18.7	68	16.3
£40,001 - £50,000	1	5.0	25	14.1	25	11.4	51	12.3
> £50,000	4	20.0	35	19.8	75	34.2	114	27.4
Sub total	**8**	**55.0**	**117**	**66.1**	**178**	**81.2**	**306**	**73.5**
Other	0	0.0	1	0.6	0	0.0	1	0.2
Pension	1	5.0	4	2.3	4	1.8	9	2.2
Student loan	0	0.0	0	0.0	3	1.4	3	0.7
DSS benefits	0	0.0	1	0.6	1	0.5	2	0.5
Sub Total	**1**	**5.0**	**6**	**3.4**	**8**	**3.7**	**15**	**3.6**
Total Respondents	20	4.8	177	42.5	219	52.6	416	100

Pearson Chi Square: 0.12

6. Congestion Charge zone (ULEZ), Earnings and Emission Standards of PTW

- (n.28/n.105) or 26.7% who own Pre Euro 3 PTWs and work in the Congestion Charge zone earn £20K or less)
- (n.37/n.105) or 35.2% who own Pre Euro 3 PTWs and work in the Congestion Charge zone earn more than £40K)
- (n.32/n.105 or 30.4% who own Pre Euro 3 PTWs & work in the Congestion Charge zone, earn >£20k up to £40k).
- Overall, of the riders who work in the Congestion Charge zone, n.105 or 42.9% who replied have pre Euro 3 PTWs, while n.129/n.245 (53%) have Euro 3 standard PTWs.
- Of the total n.245 (both pre Euro 3 and Euro 3) who work in the Congestion Charge zone, eleven riders did not provide details of the age of the PTW while of those that did, 11% earn £20k or less

Table 6: Postcodes where riders travel to work within Congestion Charge zone

Riders who work within the Congestion Charge zone (to be ULEZ in 2019)		N/a	Pre Euro3	Euro 3	Total
E1	N/a	1	0	0	1
	£10,001 - £20,000	0	1	0	1
	< £10,000	0	1	0	1
	£40,001 - £50,000	0	1	0	1
	> £50,000	0	1	3	4
	Sub Total	**1**	**4**	**3**	**8**
E1W	> £50,000			3	3
	Sub Total			3	3
EC1	£10,001 - £20,000	1	2	0	3
	£20,001 - £30,000	0	2	2	4
	£30,001 - £40,000	0	2	1	3
	£40,001 - £50,000	0	4	3	7
	> £50,000	0	1	9	10
	Sub Total	**1**	**11**	**15**	**27**
EC2	N/a	0	0	1	1
	£10,001 - £20,000	0	1	0	1
	£30,001 - £40,000	0	0	3	3
	> £50,000	1	6	6	13
	Sub Total	**1**	**7**	**10**	**18**
EC3	N/a		0	1	1
	£10,001 - £20,000		1	0	1
	> £50,000		2	5	7
	Sub Total		**3**	**6**	**9**
EC4	N/a		1	0	1
	£10,001 - £20,000		1	0	1
	£30,001 - £40,000		1	1	2
	> £50,000		0	4	4
	Sub Total		**3**	**5**	**8**
N1	N/a		1	0	1
	£10,001 - £20,000		1	0	1
	£20,001 - £30,000		1	0	1
	£30,001 - £40,000		2	2	4
	£40,001 - £50,000		1	1	2
	> £50,000		3	3	6
	Pension		1	0	1
	Student loan		0	1	1
	Sub Total		**10**	**7**	**17**
NE1	£10,001 - £20,000	1	2	1	4
	£20,001 - £30,000	0	1	2	3
	£30,001 - £40,000	0	0	1	1
	£40,001 - £50,000	0	0	1	1
	Sub Total	**1**	**3**	**5**	**9**
NW1	£10,001 - £20,000		2	1	3
	£20,001 - £30,000		0	4	4
	£30,001 - £40,000		1	4	5
	£40,001 - £50,000		1	0	1
	> £50,000		0	2	2
	Sub Total		**4**	**11**	**15**

Table 6: Post codes Cont.

SE1	N/a	0	1	0	1
	< £10,000	0	0	1	1
	£20,001 - £30,000	1	5	1	7
	£30,001 - £40,000	0	2	1	3
	£40,001 - £50,000	0	5	2	7
	> £50,000	2	1	6	9
	Student loan	0	0	1	1
	Sub Total	**3**	**14**	**12**	**29**
SW1	N/a	0	1	0	1
	£10,001 - £20,000	0	7	1	8
	< £10,000	0	1	0	1
	£20,001 - £30,000	0	5	2	7
	£30,001 - £40,000	1	3	3	7
	£40,001 - £50,000	0	2	5	7
	> £50,000	1	2	5	8
	Pension	0	0	1	1
	Sub Total	**2**	**21**	**17**	**40**
W1	£10,001 - £20,000	1	1	2	4
	< £10,000	0	0	1	1
	£20,001 - £30,000	1	4	2	7
	£30,001 - £40,000	0	2	7	9
	£40,001 - £50,000	0	2	0	2
	> £50,000	0	2	8	10
	Pension	0	1	0	1
	DSS benefits	0	1	0	1
	Sub Total	**2**	**13**	**20**	**35**
WC1	£10,001 - £20,000		1	1	2
	< £10,000		1	0	1
	£20,001 - £30,000		0	1	1
	£30,001 - £40,000		2	2	4
	£40,001 - £50,000		1	0	1
	> £50,000		2	2	4
	Sub Total		**7**	**6**	**13**
WC2	N/a		0	1	1
	£10,001 - £20,000		2	1	3
	< £10,000		0	1	1
	£20,001 - £30,000		1	2	3
	£30,001 - £40,000		1	2	3
	£40,001 - £50,000		1	0	1
	> £50,000		0	1	1
	Student loan		0	1	1
	Sub Total		**5**	**9**	**14**
ULEZ (CC zone) **Total**		**11**	**105**	**129**	**245**
Work Outside 2019 ULEZ (CC zone)	N/a	2	5	7	14
	£10,001 - £20,000	2	11	13	26
	< £10,000	0	9	0	9
	> £50,000	0	15	18	33
	£20,001 - £30,000	1	14	21	36
	£30,001 - £40,000	2	8	14	24
	£40,001 - £50,000	1	7	13	21
	Other	0	1	0	1
	Pension	1	2	3	6
	DSS benefits	0	0	1	1
	Total	**9**	**72**	**90**	**171**
Pearson Chi Square: .012					

7. Riders who commute to work in the Greater London area

The riders working in the Greater London area – i.e. outside the Congestion Charge zone, but within the proposed ULEZ to be introduced in 2021 and who replied to the survey were n.109/n.420 of whom n.43 replied that they owned pre Euro 3 PTWs and n.62 owned Euro 3 standard PTWs. The age of the riders indicate that older riders aged between 46 and 65 years make up the biggest proportion with 51.4% (n.56/n.109) and also represent the group that uses the biggest proportion of pre Euro 3 PTWs with 70% (n.30/n.43). While the age bracket 26 to 35 years has the highest proportion of PTW use in the Euro 3 emission group with 27.4% (n.17/n.62).

Table 7: (ULEZ 2021) Age of Rider and Emission Standards of PTWs

Age of Rider	Emission Standards			Total
	N/a	Pre Euro 3	Euro 3	
N/a	0	0	3	3
20 to 25 years	2	3	4	9
26 to 35 years	1	4	17	22
36 to 45 years	0	5	12	17
46 to 55 years	1	19	13	33
56 to 65 years	0	11	12	23
Over 65 years	0	1	1	2
Total	**4**	**43**	**62**	**109**

In total there were 420 responses to the survey, n.245 who replied that they worked within the Congestion Charge zone – see table 6 and n.109 who worked in the Greater London area to be designated as the ULEZ in 2021 – see tables 8 below. There were n.36 riders who worked outside London, but indicated that they frequently travelled into London either for work or leisure. Of these, n.19 replied that they owned pre Euro 3 PTWs, n.15 replied that they owned Euro 3 standard PTWs and two did not provide that information. The remainder (n.30) did not provide details of the post code of their place of work.

Table 8: Riders working in the Greater London post codes– ULEZ from 2021

Engine size	Earnings	Emission standards			Total
		N/a	Pre Euro 3	Euro 3	
N/a	£10,001 - £20,000	1			1
	£20,001 - £30,000	1			1
	£30,001 - £40,000	1			1
	Sub Total	**3**			**3**
50cc or less	< £10,000		1	0	1
	£40,001 - £50,000		0	1	1
	Sub Total		**1**	**1**	**2**
51 to 125cc	N/a	1	0	3	4
	£10,001 - £20,000	0	1	1	2
	£20,001 - £30,000	0	0	2	2
	£40,001 - £50,000	0	0	1	1
	> £50,000	0	1	0	1
	Sub Total	**1**	**2**	**7**	**10**
126cc to 250cc	£20,001 - £30,000		1	1	2
	Sub Total		**1**	**1**	**2**
251cc to 400cc	£10,001 - £20,000		0	1	1
	< £10,000		1	0	1
	£20,001 - £30,000		0	1	1
	£30,001 - £40,000		0	1	1
	> £50,000		1	1	2
	Sub Total		**2**	**4**	**6**
401cc to 500cc	£10,001 - £20,000			1	1
	£20,001 - £30,000			1	1
	£40,001 - £50,000			1	1
	Sub Total			**3**	**3**
501cc to 650cc	< £10,000		4	0	4
	£20,001 - £30,000		1	5	6
	£30,001 - £40,000		3	3	6
	£40,001 - £50,000		1	1	2
	> £50,000		3	3	6
	Pension		1	0	1
	Sub Total		**13**	**12**	**25**
651cc to 800cc	N/a		1	0	1
	£10,001 - £20,000		1	2	3
	< £10,000		2	0	2
	£20,001 - £30,000		1	2	3
	£30,001 - £40,000		0	1	1
	£40,001 - £50,000		1	2	3
	> £50,000		2	4	6
	Unemployment benefits		0	1	1
	Sub Total		**8**	**12**	**20**

Table 8: Continued Greater London post codes

Engine size	Earnings	Emission standards			Total
		N/a	Pre Euro 3	Euro 3	
801cc to 1000cc	£10,001 - £20,000		2	0	2
	£20,001 - £30,000		1	3	4
	£30,001 - £40,000		0	4	4
	£40,001 - £50,000		1	2	3
	> £50,000		2	0	2
	Sub Total		**6**	**9**	**15**
1001cc to 1500cc	N/a		1	0	1
	£10,001 - £20,000		1	0	1
	£20,001 - £30,000		4	0	4
	£30,001 - £40,000		1	3	4
	£40,001 - £50,000		1	2	3
	> £50,000		1	5	6
	Sub Total		**9**	**10**	**19**
> 1500cc	N/a		0	1	1
	£20,001 - £30,000		1	1	2
	£30,001 - £40,000		0	1	1
	Sub Total		**1**	**3**	**4**
Total	N/a	1	2	4	7
	£10,001 - £20,000	1	5	5	11
	< £10,000	0	8	0	8
	£20,001 - £30,000	1	9	16	26
	£30,001 - £40,000	1	4	13	18
	£40,001 - £50,000	0	4	10	14
	> £50,000	0	10	13	23
	Pension	0	1	0	1
	Unemployment benefits	0	0	1	1
	Total	**4**	**43**	**62**	**109**

Pearson Chi Square .111

8. Comparison of age of rider, engine size and emission standards

Table 9 below highlights information regarding the emission standards and engine size of the PTWs that the riders typically used for commuting to work in London (both ULEZ).

The comparison of the age of the rider, engine size and emission standards of the PTW indicates that the age bracket 46-55 use the highest proportion of pre Euro 3 PTWs (n.73/n.177) 41.2% followed by the age bracket 56-65 (n.46/n.177) 26%. Conversely the age bracket 26-45 use the highest proportion of Euro 3 standard PTWs with (n.57/n.219) 26%, followed by the age bracket 46-55 with (n.54/n.219) 24.7%.

Within the Euro 3 standard, the use of these PTWs was evenly distributed between the ages 26 to 65 averaging 25%, whereas within the pre Euro 3 age brackets the older groups aged 46 to 65 were more predominant.

With regards engine size, 83.6% of riders with Pre Euro 3 PTWs chose bikes with the bigger engine sizes – from 501cc to 1500cc, while those riding Euro 3 standard PTWs represented 76.3% of that group (501cc to 1500cc). Conversely the Pre Euro 3 PTWs with engine sizes of between 51cc and 500cc represented 14.1% of the riders using this standard of bike compared to 19.2% of riders using Euro 3 standard PTWs (51cc to 500cc).

The DVLA does not publish a breakdown of category of PTWs i.e. whether they are motorcycles, scooters or mopeds. Although typically mopeds have an engine size of <50cc while scooter engine sizes can range from 250cc to 850cc.

According to the MCIA (UK Motorcycle Manufacturers Association*) "the two key market segments that were behind an increase in sales in London the Home Counties in 2016 were scooters and 'naked' PTWs. Both these sectors are dominated by 125cc PTWs which rose by 15 and 17 percent respectively. This clearly illustrates the increase of interest in PTWs for use as transport".* The survey suggests that the larger size PTWs (motorcycles and scooters) appear to be used more for commuting.

The MCIA response to the TfL consultation comments that *"In 2017, the new PTW market has fallen back. The main factors behind this appear to be related to early-year availability of new Euro IV models and in more recent months a knock-on effect from a large rise in PTW theft"*[10].

[10] Source: https://www.london.gov.uk/moderngov/documents/s67440/Appendix 3 - MCIA Response.pdf

Table 9: Age of Rider, Engine size and Emission standards of PTW

Comparison of age of rider, engine size and emission type of PTW								
Engine size			Pre Euro 3	%	Euro 3	%	Total	%
		N/a					11	
50cc or less	26 – 35		1		1		2	
	46 – 55		1		0		1	
			2	**1.1**	**1**	**0.5**	**3**	**0.7**
51 to 125cc	N/a	0	0		2		2	
	20 – 25	0	0		2		2	
	26 – 35	1	3		6		10	
	36 – 45	0	0		2		2	
	46 – 55	0	4		4		8	
	56 – 65	0	1		1		2	
		1	**8**	**4.5**	**17**	**7.8**	**26**	**6.3**
126cc to 250cc	20 – 25		0		1		1	
	26 – 35		1		1		2	
	36 – 45		1		0		1	
	46 – 55		2		1		3	
	56 – 65		3		0		3	
	>65		0		1		1	
			7	**4.0**	**4**	**1.8**	**11**	**2.6**
251cc to 400cc	N/a		0		1		1	
	20 – 25		2		0		2	
	26 – 35		1		3		4	
	36 – 45		0		2		2	
	46 – 55		0		4		4	
	56 - 65		***2***		***6***		***8***	
			5	**2.8**	**16**	**7.3**	**21**	**5.0**
401cc to 500cc	20 – 25		0		1		1	
	26 – 35		1		1		2	
	36 – 45		0		2		2	
	46 – 55		3		1		4	
	56 – 65		1		0		1	
			5	**2.8**	**5**	**2.3**	**10**	**2.4**
501cc to 650cc	N/a	0	1		0		1	
	20 – 25	0	2		2		4	
	26 – 35	0	8		12		20	
	36 – 45	1	7		12		20	
	46 – 55	1	21		14		36	
	56 – 65	1	8		5		14	
			47	**26.6**	**45**	**20.5**	**95**	**22.8**
651cc to 800cc	20 – 25	0	1		3		4	
	26 – 35	0	1		9		10	
	36 – 45	0	3		13		16	
	46 – 55	0	7		12		19	
	56 – 65	1	10		9		20	
	>65	0	2		1		3	
			24	**13.6**	**47**	**21.5**	**72**	**17.3**
801cc to 1000cc	26 – 35	0	2		9		11	
	36 – 45	2	5		11		18	
	46 – 55	0	19		6		25	
	56 – 65	1	8		4		13	
			34	**19.2**	**30**	**13.7**	**67**	**16.1**

Table 9 Cont: Age of rider, engine size and emission type of PTW								
Engine size			Pre Euro 3	%	Euro 3	%	Total	%
1001 to 1500cc			3		6		9	
			9		14		23	
			16		***12***		***28***	
			12		12		24	
			3		1		4	
			43	**24.3**	**45**	**20.5**	**88**	**21.2**
>1500			0		0		1	
			0		1		1	
			1		8		9	
			1		0		1	
			2	**1.1**	**9**	**4.1**	**12**	**2.9**
Total	N/a	1	1		3		**5**	**1.2**
	20 – 25	2	5	2.8	9	4.1	**16**	**3.8**
	26 – 35	1	21	11.9	48	21.9	**70**	**16.8**
	36 – 45	7	25	14.1	57	26.0	**89**	**21.4**
	46 – 55	4	73	41.2	54	24.7	**131**	**31.5**
	56 – 65	5	46	26.0	45	20.5	**96**	**23.1**
	>65	0	6	3.4	3	1.4	**9**	**2.2**
			177		**219**		**416**	**100.0**
Pearson Chi Square & Cramer's V = .001		% of total	42.5		52.6		100	

9. Ownership of PTW

When asked about ownership, there were n.388 riders who replied that they owned motorcycles of which n.221/n.388 (57%) replied that they only owned one motorcycle, n.94/n.388 (24.2%) replied that they owned two, n.48/n.388 (12.4%) owned three, n.10/n.388 (2.6%) owned four and so forth. One respondent replied that s/he owned n.15 motorcycles.

There were n.43/n.55 (78%) riders who replied that they owned one scooter, n.8/n.55 (14.5%) who owned two scooters and n.4/n.55 (7.2%) owned three scooters, while one respondent replied that s/he owned 8 scooters. Overall, 13.2% of riders in the survey owned scooters. However, there were n.32 riders who replied that they owned one or more motorcycles and scooters.

With regards mopeds, n.6/n.8 replied that they owned one moped, one replied that s/he owned 2 mopeds and one respondent replied that s/he owned four mopeds.

10. Information about the make of the PTW

The Japanese manufacturer Honda had the highest proportion of makes in this survey, equal to 22.9% (n.18/n.61). This is followed by the Japanese manufacturer Yamaha (16.2%), the German manufacturer BMW (12.6%), Suzuki (10.0%) and the British manufacturer Triumph (9.8%). The proportion of motorcycles in this study appears to be a reflection of the popularity of the makes rather than their performance. Furthermore based on the information provided regarding ownership, the proportion of motorcycles used by the riders in the survey exceeds scooters and mopeds.

Table 10: Make of PTW

Make	Frequency	Percent
N/a	19	4.5
Aprilia	4	1.0
BMW	53	12.6
Buell	1	.2
Ducati	8	1.9
Gilera	1	.2
Harley Davidson	14	3.3
Honda	96	22.9
Husqvarna	1	.2
Kawasaki	32	7.6
KTM	4	1.0
Kymco	2	.5
Lambretta	3	.7
Lexmoto	1	.2
Morini	1	.2
Moto Guzzi	8	1.9
MZ	2	.5
Peugeot	4	1.0
Piaggio	8	1.9
Suzuki	42	10.0
Triumph	41	9.8
Vespa	7	1.7
Yamaha	68	16.2
Total	**420**	**100.0**

The vast majority of the PTW models (style) owned by the riders were naked (standard) motorcycles or Adventure type motorcycles. According to the responses of the riders, there were n.45 scooters used for commuting to work, which ranged in engine size from 125cc up to 800cc.

Table 11: Comparison of Make and Emissions Standards

Make	Standard			Total
	N/a	Pre Euro 3	Euro 3	
N/a	16	2	1	19
Aprilia	0	2	2	4
BMW	1	26	25	52
Buell	0	1	0	1
Ducati	0	2	6	8
Gilera	0	0	1	1
Harley Davidson	0	7	7	14
Honda	1	47	48	96
Husqvarna	0	0	1	1
Kawasaki	0	9	23	32
KTM	0	1	3	4
Kymco	0	0	2	2
Lexmoto	0	0	1	1
Morini	0	1	0	1
Moto Guzzi	0	6	2	8
MZ	0	2	0	2
Peugeot	0	1	3	4
Piaggio	0	4	4	8
Suzuki	1	17	24	42
Triumph	1	10	30	41
Vespa	0	6	1	7
Yamaha	0	33	35	68
Total	**20**	**177**	**219**	**416**

Conclusion

Although low wages is in part supported by some of the comments from riders who own pre Euro 3 PTWs and work in the inner London Congestion charge zone, it is not the more predominant reason of the riders who replied to the survey for using either this standard of PTW or even Euro 3 standard PTWs to travel to work.

These factors indicated in the comments of the riders relate to time and travel cost. In other words, PTWs enable the rider to cut travel time considerably, from 2 to 3 hours using public transport to half an hour, at least half the time of using a car or van. Furthermore, the cost of travelling is considerably less than using a car or public transport.

Other reasons include the unreliability of public transport; for those working shifts, similarly, the unavailability of public transport. In some instances, riders who have to travel into London indicated that the overall cost and time consumed to get to train stations or bus stops far outweighed the use of PTWs. They also indicated that the trains in particular were frequently late or cancelled. The riders who commented also mentioned the problem of congestion if using four wheeled vehicles.

Within the debates regarding the virtues of motorcycling in terms of emissions, the arguments from the motorcycling community suggest that motorcycles pollute far less than other four wheeled vehicles (of the same standard). However this is not the case for pre Euro 3 PTWs compared to Euro 3 standard PTWs, in particular the smaller 2 stroke bikes. However as the survey highlights, the proportion of riders using smaller PTWs (>250 cc) of the pre Euro 3 emission standards, is less than 10% of all pre Euro 3 PTWs. In other words, over 90% of pre Euro standard bikes are typically 4 stroke.

What is certain is that PTWs in London are far less likely to be the cause of congestion and this type of vehicle allows the rider to travel longer distances in far less time than four wheeled vehicles. Standing idle in traffic jams during rush hour traffic creates in itself situations whereby the vehicles are emitting gases and thus polluting, which typically is not the case for PTWs.

The argument in favour of allowing Pre Euro 3 PTWs within the ULEZ areas either without charge or proportionate to their size and ability to progress in traffic, should consider this factor – i.e. they are able to travel long distances in a shorter length of time without being stuck in traffic and thus ultimately in real terms, would be less pollutant, not because they emit less noxious gases, simply because they are not on the road for the same length of time as four wheeled vehicles.

In that respect, evidence provided from a mobility study carried out by the Federation of European Motorcyclists Associations highlights the *result "is crystal clear all over Europe. The motorcycles and mopeds made the journeys faster in every city.*

The average speed for motorcycles and mopeds compared to cars is higher in almost every city. Bicycles took part in the tests in Basel, Lausanne, Dublin, Marseilles, Antwerp and Brussels. The bicycle who took part in Antwerp only spent nine minutes more than the car to travel 22 kilometres! The bicyclist in the city of Marseilles was actually faster than all other modes of transport, due to a bicycle lanes and experience.

The biggest differences between the motorcycle and the car was 38 minutes to travel 29 kilometres in Oslo, (27/ 65 minutes) and 48 minutes to travel 19 kilometres in Dublin

(27/75). If you choose to ride a motorcycle instead of drive a car in Oslo, you would save more than one hour every day!

The fact that all motorcyclists have access to bus lanes in Oslo, also gave the rider a safe and pleasant journey. The rider in Dublin saves more than 1.5 hour per day compared to the motorist.

The cost for the journeys, parking and tolls was also compared. Motorcycles and mopeds used less petrol compared to cars. There were no costs for parking motorcycles and mopeds in most cities compared to cars which had to pay up to €25 to park one working day. Cars must also pay toll/congestion tax in Stockholm and Oslo where motorcycles and mopeds are excluded from the city toll. The PTW-riders spend less money commuting compared to motorists".[11]

Theft Concerns

Comments from respondents of the survey also indicated their concerns regarding the theft of their PTWs which was a reason was why they chose to ride Pre Euro 3 bikes to work or for travelling within London.

Mayor Khan indicated that there was a major problem in London with the theft of 2 wheeled vehicles (motorcycles, scooters and mopeds), with over 14,000 thefts were identified London in 2017. In fact he called on the motorcycle industry to help find solutions.

The Met Police (Greater London) indicated that over a four year period (01/01/2013 to 31/12/2016) there were 43,665 motorcycles, mopeds, scooters and tricycles stolen. In 2016, there were 14,971 thefts of which 4,769 were mopeds, 2,945 were scooters and 6,420 were motorcycles. (The remaining 837 were indicated as 3 wheeled vehicles). Unfortunately the data provided does not indicate the category by make, model or engine size, which makes more detailed analysis somewhat difficult.

In the event, there was a 32.5% increase in theft between 2015 and 2016. Based on the information from the DfT regarding the parc (registered PTWs) of London is c.125000. This indicates that the annual theft rate of PTWs in London is c.11%.

Riders have every reason to be concerned and have a strong case to present to the TfL and the Mayor's Office to exempt the ULEZ charges for older PTWs. Because in an analysis of Motorcycle Theft in London, the Fédération Internationale de Motocyclisme (FIM) Public Affairs website carries an article which covers the issues of motorcycle theft and of security. [12] The article indicates that motorcycles are mainly stolen for spare parts.

By examining the information from the survey, the majority of PTWs used by the respondents are Naked (standard) motorcycles or Adventure types. As PTWs (especially the newer models) are targeted by criminals for spare parts, the solutions to prevent the theft of these vehicles include better parking facilities *but also an old battered up bike for commuting to deter the discerning thief, (this was in fact the advice given by a reformed motorcycle thief!)* or maybe more visible law enforcement and better tactics such as policing with consent, to tackle the problem[13]**.**

[11] http://www.righttoride.eu/2014/09/24/save-time-and-money/

[12] http://www.fim-publicaffairs.com/en/analysis/motorcycles-crime-and-silver-bullets/541

[13] http://www.fim-publicaffairs.com/en/analysis/motorcycles-crime-and-silver-bullets/541

It is a paradox that the Mayor's Office is looking for solutions to prevent the high levels of theft by denying access to London through the high daily charges for riders, who choose to ride pre Euro 3 bikes in consideration of the fact that these older PTWs are less attractive to thieves.

Whether the answer is exemption from the charge altogether or a proportionate charge in consideration of the fact that the overall usage of Pre Euro 3 PTWs ridden in London is less in comparison to Euro 3 standard PTWs.

The fundamental argument, as demonstrated from other studies in Europe, is that PTWs use far less travel time and are far less likely to be held up in traffic jams. Thus in real terms, the pre Euro 3 PTWs would pollute less in comparison with four wheeled vehicles that are compliant with the later 4 and 5 Euro standards, especially diesel fuelled vehicles, simply because they are not standing idle for the lengths of time that cars, vans, lorries and buses are.

It would not be beyond the realms of the authorities of London to look again and consider that a solution can be found with what should be a reasonable and realistic compromise.

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Annex One - Comments from riders of Pre Euro 3 PTWs who work in London

	Place of work	Pre Euro 3 standard	Engine size	Comment
1	SW1	1997	> 1500cc	Most weeks I travel 3 days a week into the city by motor bike for the south coast for Consultancy work to the met river police. I have no intention of changing my motorcycle due to it reliably of a 21 year old machine.
2	SW1	1981	1001cc to 1500cc	1-3 days per week commute into London, I use an old bike which I can't afford to update. Would have to give up job if area converts to ULEZ
3	WC2	1984	1001cc to 1500cc	This vehicle is my only transport for leisure and commuting use!
4	EC4	1990	1001cc to 1500cc	I have a 1990 bike that serves my purpose perfectly, good weather protection, good luggage, for my 60 mile a day ride in all weathers.
5	WC2	1995	1001cc to 1500cc	I'm a night shift worker, it is utterly absurd for me to start paying the ULEZ charge to commute into central London with my bike as I will have to pay twice on my first and last shift (before and after midnight coming in and going back). The public transport (Tube) is also very expensive having to travel to and from zone 5 and the station is quite far from my home ,not to mention the night bus service, a total nightmare (3hrs and 2 buses to do 13miles!!)
6	SE1	1995	1001cc to 1500cc	All of my bikes are older than 2007. I also drive a van which does pass the proposed legislation. However if I drive the van in London a 20 minute bike journey becomes an hour and a half.
7	NW1	1997	1001cc to 1500cc	I am a long distance commuter coming in daily from Southend. I have a well maintained bike and I have undertaken Bikesafe and other training to be safe and responsible. But I feel I am being designed out of the landscape, by changes to the road system, this charge and the growth of bike theft in London.
8	SW1	1998	1001cc to 1500cc	I work hours when public transport is not an option most of the time and also would at least twice as long for the commute and cost a lot more
9	E1	1999	1001cc to 1500cc	My work is quite specialised and can only be completed near or around this location. Commuting using any other vehicle would be impossible due to time constraints... resulting in a huge strain on family life (3 kids.)
10	EC1	2000	1001cc to 1500cc	I visit London to have conversations with my clients. I put EC1 as an example because I frequently visit Shoreditch. I don't know where in London I may be called on to visit, I need access to all areas.
11	W1	2000	1001cc to 1500cc	Can't afford to change my motorcycle being on a low fixed income. State benefit plus small work pension
12	SE1	2005	1001cc to 1500cc	Having to come into the city on a weekend when TFL have completely shut down my rail line due to Crossrail, I have a choice of use the bike, and it's under an hour or use bus replacement and the same journey is over 2 hours (assuming there are no waits at interconnections so could be even longer).
13	EC2	2006	1001cc to 1500cc	Being priced out of bike commuting would mean yet another hit on my finances and a lot of time. Additionally instead of adding no load to the transport system I'd be another clogging up the already under capacity over ground trains.

Cont.	Place of Work	Pre Euro 3 Standard	Engine Size	Comment
14	SE1	2001	126cc to 250cc	I live and work in the borough of Southwark. In the course of my duties as a social worker I use my Vespa px to get to home visits and indeed meetings. This particular bike would be subject to a charge, so even though I am not actually commuting I am using the bike to assist me in what I deem a valuable service. This machine is in excellent condition, regularly serviced, uses unleaded fuel, and is economical. The benefits of riding on two wheels is well documented, easier parking, less space on the road, less time in traffic I also own two classic Lambrettas, belong to clubs, subscribe to magazines , attend rallies and am proud to call myself a scooterist. It is a lifestyle and also a devotion which like a lot of pastimes/hobbies helps get the working man through the working day and looking forward to the weekend.
15	EC3	1978	251cc to 400cc	I do not feel safe travelling alone on public transport, especially outside the rush hour. I started using a motorcycle in the late 70's after twice being the victims of attempted sexual assault when using public transport to travel in and out of the City. I have not been interfered with since using the bike, despite working sometimes "off" hours and/or staying in the City after work for social reasons. If I did not have my bike, I would not be able to travel into the City, as it can be very frightening for a woman on her own.
16	EC2	1993	251cc to 400cc	I can't use tube as it is underground and scary, public transport has a lot of germs
17	E1	1999	251cc to 400cc	I built my bike in my garage. My ZXR is my baby, and I don't want a new one.
18	W1	1982	401cc to 500cc	I also use a Honda C70 (70cc) 1982 about half the time and my third bike is SORN.
19	EC1	2001	401cc to 500cc	The main reason I commute on a motorcycle is quality of life, It takes less than half the time for me to commute via motorcycle than by public transport. Because of this I can collect my children from School/childcare earlier and spend more time with them. The public transport on my route is notoriously unreliable, and the few times i use it i get let down a lot. It is incredibly overcrowded and expensive. Just to ease the overcrowding it is surely better that some people use alternative methods.
20	SE2	1981	501cc to 650cc	Been riding since 16 and maintain my own vehicles to a high standard.
21	W2	1997	501cc to 650cc	I travel mostly by bike, as at present it is my only form of transport. Public transport can prove expensive as I work ling shifts irregularly and to buy a weekly or monthly ticket is not feasible.
22	SW2	1997	501cc to 650cc	Travel to meetings in London, cheaper and more convenient
23	SW1	1997	501cc to 650cc	Can't use public transport as it can take 2 hours rather than 1/2 hour on motorcycle
24	SW1	1998	501cc to 650cc	My place of work changes quite often and I am not always working in central London. I do however pass through fairly regularly and I do use public transport when the weather is bad
25	WC1	1999	501cc to 650cc	My bike may be old, but it is well looked after and has many years of valuable life left in it.
26	EC2	1999	501cc to 650cc	I chose an older bike for commuting for the following benefits: Cheap to buy & run; lower insurance premiums; reduced risk of theft; less concerned about damage in overcrowded bike bays. The introduction of the ULEZ charge will probably lead me to replace the bike with a newer model.

Cont.	Place of work	Pre Euro 3 standard	Engine size	Comment
27	EC1	2000	501cc to 650cc	I need my bike to commute to work in central London. I cannot afford a newer one, and why should I get a newer one when my current bike does exactly what I need it to do, namely get me to work in London quicker and cheaper than any other form of transport?
28	SE1	2001	501cc to 650cc	I am a motorcycle courier based in KT15 but travel to all parts of London regularly
29	WC2	2002	501cc to 650cc	Motorcycle theft is at an all time high. Having an older bike as a commuter makes a lot more sense as it is less likely to be stolen than a newer, more valuable vehicle.
30	EC2	2002	501cc to 650cc	This would certainly put me out of work as I commute to work by motorcycle as the cost of a car to work in central London is in the excess of £100 per day before I have even got to work. £30 in fuel, £60 in Parking, £10 congestion charge.
31	EC3	2002	501cc to 650cc	I can't rely upon public transport (It has left me stranded far too often), so if I can't use my motorbike then I will use my car which will only add to the traffic problem in London.
32	W1	2002	501cc to 650cc	I tend to own older bikes as they are easier to maintain yourself. As it's my main form of transport it is maintained to a high degree.
33	SW1	2003	501cc to 650cc	I am a shift worker working 24/7 365 days a year. Some of my shifts require a start time when there is no public transport available such as an 0545 start on earlies. I have no choice but to use my bike. Additionally, as I work mixed shifts, I might only need a train ticket for 2 days in a week in some weeks. This would require paying full peak rate prices which are eye-wateringly expensive. In addition to this, my bike journey is around an hour door to door. To do the same journey by public transport would be around 2 hours door to door.
34	SW1	2004	501cc to 650cc	I use a motorbike to commute and save money vs the tube. If the ULEZ charge is applied I will no longer be able to afford this
35	N1	2004	501cc to 650cc	I am a motorcycle courier and freelance sound engineer. With the state of congestion in London (too many buses and too many cycle lanes) it's the only way to get anything done.
36	W1	2005	501cc to 650cc	I'm a film producer and location manager, I ride every day. A motorcycle is the only way i can do my work in London in a timely and efficient manner. The mayor's paper on powered 2 wheel safety is excellent as should be implemented.
37	E1	2006	501cc to 650cc	I don't feel safe cycling to work, I can't afford the train, motorcycling is my only option. I'm a PhD student on 18k a year.
38	WC2	2000	50cc or less	My bike is very cheap to run. I don't earn much and if I had to pay £12.50 a day to get to work, I cannot afford it.
39	N1	1987	51 to 125cc	My Vespa is vital. It cuts congestion and my journey time, saves money, and is easier to park. Without it i would be unable to continue with my current employer.
40	SW1	2006	51 to 125cc	I am a trainee. I want to train in London not Essex as it is better but it will cost too much more with ULEZ.
41	WC1	1993	651cc to 800cc	I need my bike to work in multiple locations in central London. I cannot afford a newer one, and why should I get a newer one when my current bike does exactly what I need it to do, namely get me to customers' premises anywhere in London quicker and cheaper than any other form of transport.

Cont.	Place of work	Pre Euro 3 standard	Engine size	Comment
42	W1	1994	651cc to 800cc	I ride a 1994 Honda VFR. I've owned this for half its life and its running costs are very low. It commutes, travels long distance, it takes passengers, luggage and occasionally a dog. It's also my everyday commute.
43	NW1	1996	651cc to 800cc	I use a motorcycle as I cannot walk to and from railway and tube stations due to arthritis.
44	SE1	2002	651cc to 800cc	Ride in and out of the city on ad hoc basis. I have two bikes both pre 2002 that I would use depending on the occasion.
45	SW1	2005	651cc to 800cc	I travel in 3/4 times a week. I can't afford public transport and don't have a car, even if I did I'd never make it in time but can filter through traffic on my bike quickly. I can't afford a newer bike so would have to give up my job.
46	W2	2005	651cc to 800cc	I ride my bike every day in to London, as by public transport it would take me over 2 hours to get in to work. So I'm riding 5 days a week and like most around 50 weeks per year.
47	SW1	2006	651cc to 800cc	Às a traveling engineer, each day is to a new venue in the city.
48	W1	1983	801cc to 1000cc	Infrequent visits to office to avoid using public transport
49	W1	1990	801cc to 1000cc	Both my wife and I are disabled and on limited income. We cannot afford a compliant bike. We come to London predominately for our charity work, it is cheaper to come by motorcycle than car or train.
50	EC1	1994	801cc to 1000cc	I ride 140 miles for the round trip to EC1A from my home in Oxfordshire. I'd love to use public transport rather than freezing my arse off on the M40, but there isn't any in my village. If I drive to the station, it is £64 a day, plus tube, for the same trip, plus the petrol to get the 14 miles to the station. I can't ride anything under 125cc as it's illegal on the motorway, so I need a bike with a larger engine. If I rode a new (compliant) bike, I'd slash the value of it in weeks, so I use my old GS as it has no more value to lose. Also, there aren't any other bikes with the GS' cargo capacity. I don't have a vote in London - and neither do many riders of larger machines who need a big bike for motorway work.
51	EC1	1996	801cc to 1000cc	Most practical form of transport for me. Train is too expensive as would be peak pricing - only part time means not worth getting a season ticket. Car is also older so would fall into charge parameter and that would just add to congestion/pollution. Although if the bike ends up being charged for I'll consider the car in the winter months
52	NW1	1997	801cc to 1000cc	I can't use public transport because it doesn't cover the shift hours I work.
53	SW1	1998	801cc to 1000cc	I cannot afford to pay for public transport so my bike is the easiest and best mode of transport for me
54	EC2	2001	801cc to 1000cc	I have no rail station near me. If I had to change to public transport, it would require driving a car to the nearest station, plus 1 to 1 1/2 hours extra journey time each way.
55	SE1	2002	801cc to 1000cc	I have been riding bikes for a very long time. I commute by bike because it is a reliable, flexible, time saving and most importantly, affordable way to commute for me.
56	EC3	2002	801cc to 1000cc	Road conditions, grit/salt in the winter, etc. is the reason why I commute on an older bike.
57	W1	2003	801cc to 1000cc	I'm a motorcycle courier

Who Rides London?

This survey aims to identify motorcycle, scooter and moped riders who typically commute to work in the proposed ULEZ zones of London. The objective is to find out the profile of the riders and the type of powered two wheelers (bikes/scooters/mopeds) travelling in these areas. The results will hopefully offer riders the opportunity to put forward a case for continued access to all areas in London for all powered two wheelers (PTWs) and to highlight the importance that this form of transport offers.

For information, The Ultra Low Emission Zone (**ULEZ**) is an area within which most vehicles will need to meet exhaust emission standards (**ULEZ** standards) or pay a daily **charge** to travel. In particular, in London the first stage of ULEZ will operate 24 hours a day, 7 days a week within the same area as the current Congestion Charging Zone (CCZ), and comes into force on 8 April 2019.

See here for more details: https://tfl.gov.uk/modes/driving/ultra-low-emission-zone (https://tfl.gov.uk/modes/driving/ultra-low-emission-zone)

We only request basic personal details. Also requested are details your bike/scooter/moped. If there is any question you do not wish to answer, move on to the next, none are compulsory.
There are 10 questions in this survey

Personal details

Any information is anonymous and aims simply to give a generic profile of riders who travel within the proposed ULEZ zones.

1 []How old are you?

Only numbers may be entered in this field.

Please write your answer here:

2 []Your sex

Please choose **only one** of the following:

- ◯ Female
- ◯ Male

3 []Please indicate your employment status

Please choose **only one** of the following:

- ◯ Employed fulltime
- ◯ Disabled (employed fulltime)
- ◯ Employed parttime
- ◯ Disabled (employed parttime)
- ◯ Self employed
- ◯ Retired
- ◯ Student fulltime
- ◯ Student parttime
- ◯ Not employed
- ◯ Disabled (not employed)
- ◯ Other

4 []Please indicate your approximate annual income.

Please choose **only one** of the following:

- ◯ Below £10,000
- ◯ Between £10,001 and £20,000
- ◯ Between £20,001 and £30,000
- ◯ Between £30,001 and £40,000
- ◯ Between £40,001 and £50,000
- ◯ More than £50,000
- ◯ Unemployment benefits
- ◯ Student loan
- ◯ Pension
- ◯ Other

5 []Please indicate the post code where you reside. NOTE: only the first part required e.g. SW1

Please write your answer here:

6 []Please indicate the postcode where you work, study or travel to regularly. NOTE: Only the first part required e.g. NE1

Please write your answer here:

MC/Scooter/Moped

Could you please give details of your bike/scooter/moped.

7 []How many motorcycles, scooters and/or mopeds do you own?

Please write your answer(s) here:

Motorcycle/s

Scooter/s

Moped/s

8 []Please indicate the make, model and year of manufacture of your bike/scooter/moped that you normally ride in London for work, study or regular travel.

Please write your answer(s) here:

Make

Model

Year of manufacture

9 []Please indicate the engine size (cc) of your bike/scooter/moped that you normally ride in London for work, study or regular travel.

Please choose **only one** of the following:

- ◯ 50cc or less
- ◯ 51 to 125cc
- ◯ 126cc to 250cc
- ◯ 251cc to 400cc
- ◯ 401cc to 500cc
- ◯ 501cc to 650cc
- ◯ 651cc to 800cc
- ◯ 801cc to 1000cc
- ◯ 1001cc to 1500cc
- ◯ More than 1500cc
- ◯ Electric
- ◯ Other

Comment

10 []Please leave any relevant comment that you may feel would help to understand your particular situation so that we can produce a valid study of riders and their bikes/scooters/mopeds in London. Thank you very much for your input.

Please write your answer here: