

Social and
Economic Value of

Trail and Adventure Motorcycling

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**TRAIL RIDERS
FELLOWSHIP**



£395K

The value per mile of
motorcycling on the Green
Road Network⁸

£2.4Bn

The annual economic
contribution of trail and
adventure motorcycling⁸

A passion with purpose

Trail and adventure motorcycling is for many a passion – an experience that calls to the human soul and spirit, answering the call for our connection to nature, offering a unique way to explore the beauty and character of landscapes. But beyond the pleasure of the ride, trail and adventure motorcycling is a force for good.

It strengthens local economies, nurtures communities, champions environmental responsibility and improves the health and wellbeing of those that participate. The Trail Riders Fellowship (TRF) and its 10,000 dedicated members, alongside the wider riding community, have long understood these multifaceted values, contributing to the world around them with each mile they traverse.

While 'value' often brings to mind economic figures, the true worth of trail and adventure motorcycling goes beyond the monetary. It has enormous social value, based on personal relationships, a respect for nature, a love for exploration, providing physical and mental health benefits, preserving the nation's cultural heritage, and promoting sustainable tourism. And in a time where communities are seeking connection and economies need revitalisation, trail and adventure motorcycling's positive impact is more relevant than ever.

Trail and adventure motorcycling has become an important form of active recreation within the motorcycling sector, inspired by figures like Ewan McGregor, Charley Boorman, and Dakar Rally champion, Sam Sunderland. While few riders may embark on such epic journeys themselves, the dream of adventure drives the economic value of the sector. Riders invest in motorcycles, training, specialised apparel and accessories, as well as spending with the businesses and communities on their travels as

they celebrate outdoor exploration and freedom, be it on Green Roads or sealed 'black' roads.

Using the latest data from a variety of sources the TRF conservatively values the economic contribution of trail and adventure motorcycling at over £2.4Bn⁸ annually, making it a significant part of the broader motorcycling market, which is currently valued by the Motorcycle Industry Association (MCIA) at just over £7Bn¹. This is a figure that highlights its importance not only as a form of active recreation and sustainable transport, but also as an economic lifeline for the businesses riders rely on and the communities they travel through.

To truly appreciate trail and adventure motorcycling's significance, this report explores its broader role in society, its symbiotic relationship with rural communities, and its vision for a sustainable future. It is worth noting that the £2.4Bn does not assign a monetary value to significant social contributions, which, if included, would greatly enhance the worth of trail and adventure motorcycling.





Supporting national and local economies

The UK motorcycle industry is a powerful economic driver, generating over £7Bn each year and supporting over 50,000 jobs across more than 5,000 businesses¹. Trail and adventure motorcycling represents a significant part of this industry, making an outsized contribution that reaches some of the UK's most remote economies. But how does it drive economic growth?

Trail and adventure bikes lead the charge in the UK motorcycle market. In 2023, these bikes accounted for 25.6%³ of new motorcycle sales³ and generated £272M⁸ in new bike sales alone. The used market adds even more value, bringing the overall insured value of bikes in the trail and adventure bike sector to approximately £1.5Bn⁸.

Riders explore the countryside on road registered bikes which, according to the Financial Conduct Authority (FCA), generates motorcycle insurance premiums totalling £291M⁵ annually, with £44.7M coming from trail and adventure bikes.

Looking at the wider picture of tax revenue from the trail and adventure motorcycling portion of the wider

sector, including VAT, Insurance Premium Tax, and Vehicle and Fuel Duty, these taxes contribute over £218.3M¹ annually to the UK treasury. This tax revenue strengthens public resources, supporting everything from infrastructure to healthcare. Trail and adventure motorcycling contributes both directly and indirectly to the services and amenities that sustain our society.



£7B revenue is generated each year from the UK motorcycle industry¹



50,000 jobs are supported by the UK motorcycle sector across more than 5,000 businesses¹





£272M revenue generated in 2023 from the sales of new trail and adventure motorcycles⁸



£44.6M of the wider motorcycle insurance premium market totalling £291M relates to trail and adventure bikes⁵



£218M annual tax revenue generated from the trail and adventure motorcycling¹

Investing in the ride

Equipping a bike for adventure does not come cheap, and riders invest heavily in quality accessories.

With £145.1M⁴ spent annually on equipment and accessories, supporting a network of manufacturers and retailers, this spending not only keeps riders safe and well-equipped, but also fuels businesses in sectors ranging from clothing and protective apparel to cutting edge technology for navigation and safety. For riders, accessories are more than just embellishments, they're essential

tools that allow them to venture into some of the most remote areas of our countryside confidently and responsibly.

Trail and adventure riders treat their bikes with care, understanding that proper maintenance is crucial for safe and reliable riding. An estimated £108.7M⁴ is spent each year on bike maintenance by the riding community, spending in a network of specialist businesses employing skilled professionals whose expertise keeps the riders on the road.



£145.1M spent annually on trail and adventure bike accessories⁴



£108.7M spent each year on trail and adventure bike maintenance⁴

ADDING VALUE: HOSPITALITY BUSINESS

Royal Oak Community Owned Pub & Shop, Stoke St Gregory, Taunton

There are 43 groups in the TRF, and most have a monthly meeting to discuss various aspects of the individual groups' activities. These are largely social events and are often held in a local hostelry. Somerset TRF is one such group and meets at a Community Owned Pub in Stoke St Gregory, near Taunton. This is a busy group and gets a good turnout each month, as one of the pub's Management Committee explains:

"They come on the first Thursday of the month, every month. It is great to see so many people come to these meetings and using our function room. It is often between 50 to 60 that come with typically 15 to 20 buying a meal before the meeting and everyone buying drinks throughout



the night. For our community venture this is a big deal and brings in a lot of needed turnover on a regular basis, it is a real boost to our monthly tight trading numbers"

**Annual value to the business:
£10,800**



Investing in safety, skills and passion

Riders recognise the benefits of honing their skills, not only for their own and others' safety but also to extend their capacity for exploration and adventure. Specialised training is available directly from major manufacturers like Yamaha, Triumph, Honda, and BMW, as well as independent training centres, adding a further estimated £3M⁸ in annual economic activity. These gatherings are vibrant hubs that connect people, spark new interests, and nurture a community spirit that transcends the trail.

Commercial guides also operate throughout England and Wales adding both value to the sector as well as the communities they navigate through.

The trail and adventure riding community also finds unity and reward in a growing calendar of riding and social events. The Adventure Bike Festival, valued at £10M by the event organisers, draws thousands of attendees annually, not only from the UK but also from around the world, celebrating the culture, and spirit of adventure riding. Motorcycle Live, another highly popular event, which is hosted by the Motorcycle Industry Association (MCIA), dedicates extensive floor space to trail and adventure bikes, providing riders the chance to immerse themselves in a shared passion with annual events attracting up to 90,000 attendees.

Beyond these larger events there are a host of other smaller riding and social events in England and Wales throughout the year, including the Armchair Adventure Festival, the Overland Event and the Lightweight Adventure Festival, plus many others. Taken together the estimated value of events could be close to £15M⁸, contributing further to the importance and value of the trail and adventure motorcycling sector.

Motorcycle sport: when competition calls

Motorcycle sports also have a rich and storied history in the UK and are unified by a shared heritage of skilled competitive and technical mastery.

While trail and adventure riding are non-competitive, many riders also participate in or support these sports. In addition to the £2.37B generated by the trail and adventure sector, the motorcycle sport sector in the UK contributes a further £1.2B⁷ annually, making it an integral part of the broader motorcycle economy. The legacy and influence of these sports create a dynamic, interwoven culture that celebrates skill, resilience and community, a spirit that fuels both competition and recreation.



£1.2B is the motorcycle sport sector's contribution to the UK economy⁷





...the riding school is fantastic for the local community, attracting riders to the area who use our local cafes and restaurants, as well as local accommodation.

**ADDING VALUE:
COMMUNITY**

Trail and adventure training school - Llanidloes, Powys

There are many training organisations around the country, some linked with leading manufacturers while others are independent. Yamaha Off Road Experience (YORE) in Llanidloes, Powys is a trail and adventure riding school operated by the same family for the best part of 30 years. They are busy all year round, offering training and tours as they explain:

"We have a full programme of tours and training, that starts with simple learn-to-ride programmes and extends up to four days of adventure touring around this area. Each year we see around 2,000 riders through our doors. We don't offer food or accommodation as we've always sought to share the financial opportunities with our local business community. It's most likely we're the biggest draw for tourism spend in Llanidloes and the local area."

Russell George MS / AS Member of the Welsh Parliament for Montgomeryshire: "It's wonderful to have the well-established Yamaha Off Road Experience in the area, sat next to the magnificent Hafren Forest in Mid Wales. The local economy benefits from the visitors to the school, based just outside the market town of Llanidloes, and it's fantastic for the local community, attracting riders to the area who use our local cafes and restaurants, as well as local accommodation."

At the Hafren Forest Hideaway, a B&B and bunkhouse, the co-owner says trail riders have become a bedrock of their business.



"We really enjoy the trail riders, we didn't think when we started that we'd get on with them, but we're in our mid-50s like so many of the riders, so we get along just fine. They're a nice sharing community, they come in groups and are typically either men and women in their 50s and 60s, or younger people with their own businesses. We do get younger riders but they're mixed in with the older ones – it's amazing how well they all get along together."

"We have the Yamaha Off Road Experience not very far from us and they'll send riders to us for accommodation, or we'll have the riders come here and YORE come and put on a day with our guests. YORE have just built a fantastic oak-framed lodge to house their operation and they could have added accommodation to that, but they didn't, it's a mark of their community spirit that they work with other local small businesses – we all help each other."

Annual value to the business and local Llanidloes community:

£980,000





Sustainable tourism: investing in rural communities

Motorcyclists bring a distinctive boost to UK rural tourism, injecting much-needed revenue into rural communities. The Country Land and Business Association (CLA) reports that 70-80% of domestic UK tourism takes place in rural areas, contributing £14.6Bn² to the economies of England and Wales.

By travelling on roads less travelled, riders help channel this substantial economic power into less-touristed regions. Their presence ensures that the benefits of tourism are distributed more evenly across the country, preserving local heritage, supporting traditional livelihoods, and sustaining vibrant communities.

Trail and adventure motorcyclists responsibly and sustainably share the Green Road network of which there is approximately 6,000 miles¹⁶. This means the economic value of motorcycling on the Green Road network is a staggering £395K⁸ for every mile.

UK motorcycling generates tourism expenditures of around £824M¹ according to an ICF Consulting (ICF) report on the economic benefits of motorcycling in the UK, supporting a further 13,000 jobs. The proportion of this expenditure considered to be from trail and adventure bike riders



89% of rider spending occurs in rural areas⁴



£131.9M of the wider UK motorcycling tourism expenditure of £824M can be attributed to trail and adventure motorcycling¹



is estimated to be £131.9M¹ which is supported by the TRF's own research in this area. A recent survey by the TRF revealed that 89%⁴ of rider spending occurs in rural areas.

Riders routinely spend on local accommodation, food, fuel, and supplies, benefiting small businesses that depend heavily on these visitors. These businesses – campsites, B&Bs, village pubs, and independent shops – serve as economic pillars in remote towns and villages, and riders provide a lifeline to keep them thriving. Almost 70% of businesses responding to the DEFRA Landscapes Review consultation in 2023¹¹ opposed further restrictions on motorised traffic on Green Roads, such would be the devastating impact on them and the threat to their businesses and employees.

A small group of riders can easily inject £4K into a local economy through spending on accommodation, food, and fuel during a typical weekend outing. This local spending is in addition to the £11.3M⁸ riders spend on travelling to locations to ride.

On average trail and adventure bike riders enjoy two days out each month which sees them spend over £100M⁴ per annum. Many rides include an overnight stop and this adds a further £15.5M⁴. When riders have more time and embark on a ride outside the UK, a further £183M⁴ is generated.



ADDING VALUE: COMMUNITY & CHARITY

Canterbury Trails – Kent

Kent TRF held a weekend camping and trail riding event in June 2024. Located on a family owned and run farm in East Kent, the event boosted the farm income by £2,500 while the village store and pub also saw a good uptick in turnover for the weekend. With 50 TRF members attending, the group also organised a raffle with prizes donated by members and local motorcycle retailers. The raffle raised a further £1,000, equal to £20 per member. The members were unanimous in deciding to award the raffle monies to the local Pilgrims Hospice which does such vital work in end-of-life care in the region. In all, the group calculated their spend with the local community over the weekend to be just shy of £7,000.

Hosts for the event was Knowler Farm, Stelling Minnis who had this to say: "We hosted the TRF for a rally for the first time last year. They are a great group of people, friendly and respectful, cleaned up after themselves, really well organised and great at communication, we look forward to hosting them again this year!"



Environmentally responsible countryside access

Motorcycling is already making a positive contribution to reducing human impact on the environment. It embodies an environmentally responsible and socially enriching approach to countryside access, offering a much-needed alternative to the heavy car dependence associated with visits to rural areas including National Parks and Landscapes.

English National Parks welcome 90M¹⁰ visitors each year, with an estimated 93%⁹ of these journeys made by car. Beyond this, 170M¹⁷ visits to National Landscapes are made each year, leading to avoidable congestion and pollution.

Motorcycling is a viable and sustainable solution to these challenges, providing a low-impact, space-efficient, and flexible form of transport ideally suited to accessing the countryside. Importantly, motorcycles produce

significantly less pollution, with the Department for Transport (DfT) reporting that the entire universe of motorcycles on the UK's roads is responsible for just 0.4%¹² of UK transport's Greenhouse Gas emissions. Making up around 3.3% of licensed vehicles, most motorcycles produce less than half the carbon emissions of cars. Britain's most popular trail bike, for example, emits just 75g CO₂/km¹⁴ – less than half of the average car's 165-170g CO₂/km¹³.

A report from Zero Partnership²¹ further highlighted motorcycling's contribution to Net Zero targets, urging the Government to fully acknowledge its role in reducing emissions and improving mobility.

By reducing the reliance on cars for countryside access, motorcycling can alleviate congestion and decrease pollution. Internationally respected transport research company Transport & Mobility Leuven¹⁸ reports that just a 10% modal shift to motorcycles can reduce congestion by up to 40%.

40%

...reduction in congestion could be achieved with just a 10% modal shift to motorcycles¹⁸

75 grams /km

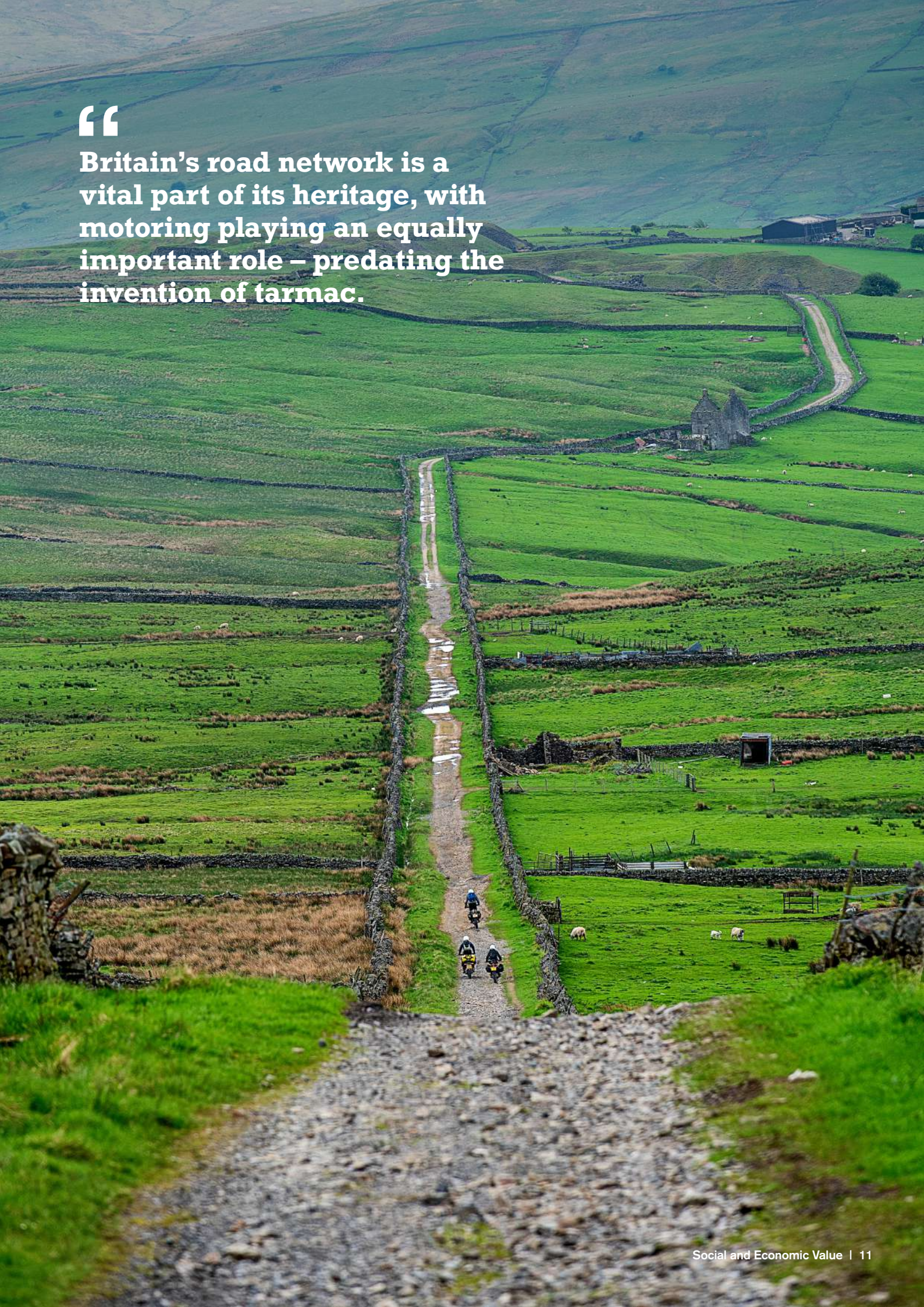
Britain's most popular trail bike emits less than half the CO₂ emission emissions of the average car¹⁴

0.4%^{Just}

...of the UK transport's greenhouse gas emissions (GHGs) is attributable to motorcycling, according to the DfT¹²

“

Britain's road network is a vital part of its heritage, with motoring playing an equally important role – predating the invention of tarmac.



The added value of volunteering

Riders are well aware of how fortunate they are to enjoy the countryside in such a unique way. And they don't take this privilege for granted. Riders involve themselves in a range of voluntary activities that benefit local communities, good causes, charities, nature and the environment and extend far beyond themselves.

Volunteering is a powerful force that has immense social value and positive impact on society. For communities to thrive and prosper, everyone has a responsibility for their behaviour, actions, and their effects on others, both as individuals and as part of organisations. It is essential to give back, demonstrate tolerance and understanding, and actively contribute to the communities to which they belong. Motorcyclists have long recognised this responsibility and have been dedicated to making meaningful contributions for decades.

The social and economic contribution of volunteers is immense. Research from the Sport Industry Research Centre at Sheffield Hallam University estimates that the work carried out by volunteers in the sport and recreation activity sectors alone is valued at £5.7B²² per annum. This is a staggering figure that highlights just how significant volunteer work is to the economy.

After the success of the London Olympics, the Hidden Diamonds research into volunteering placed an individual volunteer's yearly contribution at £16,032¹⁹. Research by Sport England takes a broader view of the annual social value of community

sport and active recreation to be an incredible £107.2B²⁰. This shows that volunteering is not just a charitable act; it has measurable economic benefits that support industries and communities alike.



£5.7B per annum is the value of work carried out by volunteers in the sport and recreation activity sector²²

ADDING VALUE: COMMUNITY & CHARITY

Air Ambulance

Many TRF groups fundraise for the charities that support the Air Ambulance service around the country, a service that is vital to rural communities given the surprisingly low number of hospitals across the UK which have major trauma centre facilities.

Such an example is the North Wales Trail Riders Fellowship which since 2022 has raised over £6,000 for the lifesaving charity, from its various trail riding activities.

Regional Fundraising Manager from the Air Ambulance, said: "A huge thank you to all the organisers and riders who took part in the fundraising events. We are delighted



that the Trail Riders Fellowship has once again continued its support of our lifesaving all-Wales charity. They have continued to fundraise for us each year, which is incredible and we're extremely grateful.

"Their continued support will enable us to keep our helicopters in the air and our rapid response vehicles on the road across the country. Thank you so much, your fundraising will help us to be there for the people of Wales when they need us most."





Fostering environmental and societal stewardship

Green Roads offer an invaluable gateway to the stunning UK countryside, providing everyone, regardless of their mode of travel, with a unique way to explore and appreciate these landscapes. As shared public highways, Green Roads are there for everyone's enjoyment but, like all public paths and roads, require regular maintenance to remain accessible and safe.

Although upkeep falls under public funding, riders recognise the strain on local authority budgets and resources. Every year, they donate countless volunteer hours and significant funding to maintain and improve the Green Road network, ensuring these routes remain open for all. The TRF works with businesses, councils, and authorities to support Green Road maintenance and sustainable countryside access. These partnerships are integral to rural sustainability, providing a collaborative approach that reinforces the values set out in government environment planning.

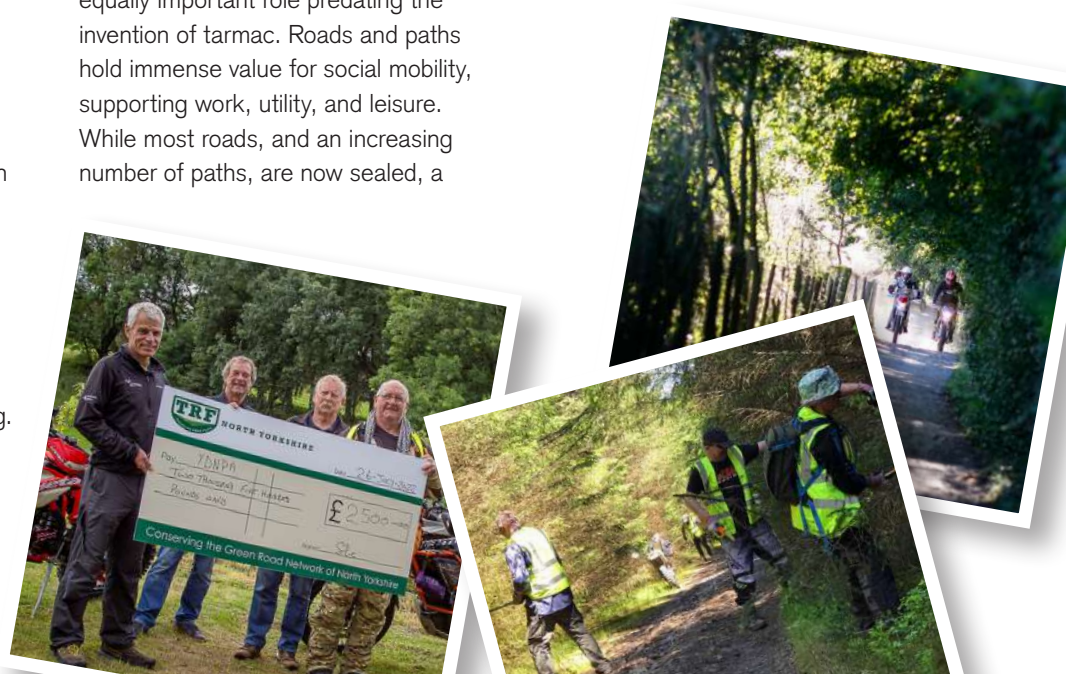
Unfortunately, many Green Roads are under-recorded or, worse, absent

from official records, leaving them at risk of being forgotten. It's only through the dedication of passionate volunteers, poring over historical maps and documents, that many of these routes are rediscovered and restored. Left neglected, these routes become overgrown, inaccessible, and ultimately lost to the public. But thanks to the tireless work of volunteers, countless Green Roads are being revived for everyone's enjoyment.

Britain's road network is a vital part of its heritage, with motoring playing an equally important role predating the invention of tarmac. Roads and paths hold immense value for social mobility, supporting work, utility, and leisure. While most roads, and an increasing number of paths, are now sealed, a

small but important minority remain unsealed Green Roads, which deserve greater recognition and protection. Public access to roads and many paths has been undermined. Fortunately, organisations like the TRF, The Ramblers, Open Spaces Society and the British Horse Society continue to champion responsible and sustainable access in the public interest.

Long before the Government's call for a digital register of unsealed roads, the TRF pioneered the Green Road Map initiative. Entirely funded by the TRF





and supported by tens of thousands of volunteer hours, this public access project provides a digital record of Green Roads. Authorities and other user groups have been encouraged to join in, making this an inclusive, collaborative effort to preserve the UK's countryside heritage and keep it accessible to all user groups.

Law and order

As well as engaging directly with rural authorities, riders understand that education is an important preventative tool, one that positively fosters enjoyment of the countryside while reducing the risk of misuse by cultivating experience and understanding.

Motorcycle organisations such as the TRF play an active role in helping authorities maintain public order. The TRF works with authorities to help

address illegal & anti-social riding and rural crime, supporting local communities helping to maintain public safety and enhancing the rural experience for all.

Trail riding is a compelling way to introduce young people to outdoor activities, creating a pathway to environmental appreciation and responsible use of natural spaces. The Landscapes Review emphasises the importance of fostering future generations' connection to the countryside, noting that "seeing and knowing our country is the best way to respect and save it."

Motorcycling unites individuals from diverse backgrounds, creating bonds through shared outdoor experiences. The third Rural Proofing Report

acknowledges recreational activities like trail riding as vital in building "thriving communities" by supporting social networks and encouraging mutual support. By bridging the divide between urban and rural populations, trail riding helps foster appreciation of the countryside. Urban riders gain a first-hand understanding of rural life, encouraging a culture of respect and shared responsibility between urban and rural communities. This exchange strengthens the social fabric of rural areas, building resilience by promoting understanding and unity.



ADDING VALUE: NATURE & ENVIRONMENT

North Yorkshire National Park

The North Yorkshire TRF (NYTRF) goes beyond simply responding to its Path Keeper responsibilities, such as addressing fallen trees or drainage issues. It has adopted a proactive approach, with volunteers working to prevent damage and promote access, ensuring lanes remain open for all users, including walkers, mountain bikers, and equestrians. By the end of summer, many lanes become overgrown, requiring clearing to maintain accessibility and enjoyment for everyone.

By the end of summer many lanes become overgrown and need clearing so all users can enjoy them. A NYTRF Group Officer commented;

"We often arrange lane clearances as part of our work to support the Path Keepers scheme. I am always astounded by the levels of support and encouragement from members of the public who come across our working parties. Most of whom had no idea we undertook such volunteer work. One couple, walking, explained that in their Dales guidebook it reported that this lane was

susceptible to being overgrown and difficult to navigate, and so were extremely complimentary and grateful for the work the TRF was undertaking.

As we move into winter and the coming new year, our attention is focussed on working with the various governing bodies, such as North Yorkshire Council, the various land owners and farmers as well as local communities who all benefit from our volunteer work. The Path Keepers scheme is something we feel very passionate about and are proud to be part of."

Yorkshire Dales National Park commented on the working partnership forged with the TRF;

"Thank you for financial contributions towards the maintenance of Byways Open to All Traffic in the Yorkshire Dales National Park. The Authority is also grateful for your work on the NYC Path Keepers project. Your members' on-the-ground, practical work on green lanes in the Yorkshire Dales and throughout North Yorkshire is appreciated."



Building a healthier nation through inclusivity

Successive governments have had the ambition to create a happier, healthier nation by getting more people more active, more of the time. Key to achieving this ambition is recognising the importance of diverse and inclusive opportunities for people to maintain their health and well-being. Equitable, fair, reasonable, and responsible access to the countryside plays a vital part in reaching this goal.

The Sport and Recreation Alliance recognises the importance of diversity and inclusion in its mission to make sport, recreation and physical activity more accessible to everyone and fosters a healthier, happier, more productive and prosperous society. The physical and mental health benefits of trail riding are clear, helping to get more



The physical and mental health benefits of trail riding are clear, helping to get more people, more active, more often.

Sport and Recreation Alliance

people, more active, more often. A greater appreciation, respect and understanding of nature and the environment leads to a greater desire to conserve and protect. A TRF survey revealed the number one reason riders use Green Roads is to get closer to nature.

They want to experience as much as they can of what the “Natural Health Service” has to offer in the limited time they have available. This time limitation is a driving force behind why riders choose to explore nature and the countryside responsibly and sustainably on a motorcycle. Riding allows people to experience more miles of our green spaces – with the ambition of leaving little evidence that they were ever there.

Time in nature is widely recognised for its positive impact on health, reducing stress, anxiety, and depression while enhancing overall wellbeing. The

unique combination of active riding and immersion in natural landscapes makes trail and adventure riding particularly effective in improving both physical and mental health. These social and health benefits add another layer to trail and adventure riding’s value.

The TRF has explored the health and wellbeing benefits of trail riding in a separate report, but the following is a useful reminder.

Sport England’s extensive research on the social value of sport and physical activity estimates an annual wellbeing impact of £97 billion in 2023.



Additionally, the annual health benefits are valued at £10.5B. This impact is evident in the prevention of serious health conditions, including:

- 149,000 cases of heart disease prevented
- 107,000 of strokes prevented
- 619,000 cases of type 2 diabetes prevented
- 14,000 cases of cancer prevented
- 57,000 cases of dementia prevented
- 1,293,000 cases of depression prevented.

Using the data from this research the annual wellbeing and health value of trail riding is £59.9M.

With 88%⁴ of trail riders aged over 40, this demographic represents a particularly vulnerable group at risk of poor physical and mental health. Yet, 98-99%⁴ of riders report that trail riding has a positive impact on their physical and mental wellbeing.

By staying active and enjoying the outdoors, riders help prevent conditions like heart disease, diabetes, and depression, all while reducing the burden on the NHS.

Trail riding, therefore, doesn't just benefit the individual rider, it contributes to healthier communities and a healthier society as a whole.



£59.9M

the annual wellbeing and health value of Trail Riding^{22/23}



99%

...of riders report that trail riding has a positive impact on their mental health and wellbeing⁴



98%

...of trail riders report physical health benefits from trail riding as an active recreation⁴

ADDING VALUE: COMMUNITY

Rural Crime and Anti-Social Behaviour

The TRF has fostered a special relationship with police forces around the country, aiding and assisting with combatting rural crime, and illegal vehicle use.

In North Yorkshire, the TRF has been pivotal in getting motorcycle-riding police officers into the countryside, as the local group chair explains:

"We ride out with them on joint operations with National Parks to combat anti-social, off-piste and illegal motor vehicle use. By having a TRF rider alongside an officer who has good knowledge of the Green Roads in the area the police can cover more ground and identify areas which may be susceptible to crime."

A spokesperson from North Yorkshire Police said, "Working with the TRF has been invaluable in addressing anti-social behaviour (ASB) in the National Parks. It's not only about educating the public on the illegal use of BOATs, but also raises awareness that the National Parks,

TRF, and North Yorkshire Police are collaborating to protect our countryside and lanes. The National Parks are a fantastic place to live, work, and visit, and with the support of various agencies and the public, we can keep it that way."

In South Wales the TRF group there similarly works closely with its local force and community groups, as one of the TRF group's Officers explains:

"We support the Gwent Valley Illegal Off-Road Partnership led by Gwent Police, focusing on tackling illegal off-road motorcycling and 4x4 use. We attend meetings, rider education initiatives and provide access to the TRF Green Road Map to aid their work. "We provide advice and support to protect legal trail riding, working alongside farmers, landowners, local communities, MPs, and council officials to address rural crime and anti-social behaviour."





A force for good – a force for the future

Trail and adventure motorcycling is a force that transcends those that directly get enjoyment from the experience. It's a pillar of economic growth, a protector of rural livelihoods, an enabler of environmental sustainability, and a source of mental and physical well-being.

It generates billions in economic impact, has immense social value on multiple levels, enriches rural

communities, and advocates for responsible use of the UK's natural landscapes.

As we move forward, it's vital to protect and support trail and adventure motorcycling, recognising its value to the UK's economy, countryside, and communities. It represents a way of life that is both adventurous and responsible, grounded in a respect for nature and a commitment to giving back.

In every journey, there is an opportunity to make a positive impact – a vision that the TRF and riders across the UK continue to bring to life.

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National Motorcyclists Council and Trail Riders Fellowship Data Analysis and Assessment

In 2023 the TRF undertook a national survey of trail and adventure riders to better understand the riders they represent. With close to 2500 thousand responses the survey has provided valuable and reliable insight in a number of key areas.

Further work with the National Motorcyclist Council using data gathered from other third-party organisations, including insurance company returns (which indicate that around 15% of motorcycling activity is focussed on the trail and adventure sector), enabled the research to be independently verified. It must be stressed that these figures are informed estimates. Please contact the TRF if you would like to discuss this data further. engage@trf.org.uk

Trail & Adventure Riding: the annual value



£1.5Bn

Insured value of trail and adventure motorcycles⁸



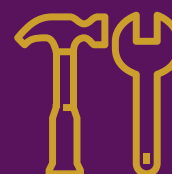
£44.7M

Insurance premium value⁵



£145.1M

Accessories Value⁴



£108.7M

Maintenance and serving costs⁴



£131.9M

Sustainable tourism value to UK¹



£183.5M

UK rider sustainable tourism value abroad

**Total
£2.4Bn**

The annual value trail & adventure motorcycling⁸



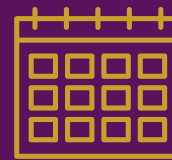
£218.3M

Tax revenue value to UK Treasury¹



£3.1M

Training and rider development⁴



£15M

Event and exhibition value⁸

It is worth noting that the total figure of 2.4Bn does not assign a monetary value to significant social contributions, which if included, would greatly enhance the worth of trail and adventure motorcycling.

Part of our cultural heritage

Trail riding has been an integral part of Britain's cultural heritage since motorcycles first became commercially available in 1896. Today, motorcycling sets the public free to explore and enjoy the countryside in a way not possible by other means.

The first Land's End to John O'Groats journey by motorcycle was made in 1901, before tarmac had been invented, let alone used to cover most roads. In 1904 the first Edinburgh Trial was run, starting in London and making its way over a 400-mile route. The sporting and manufacturing heritage of motorcycling is indelibly entwined in Britain's history through famous events and brands.

Whilst electric motorcycles are not new, with the first patent appearing in 1868, electric motorcycles and cycles are now available representing a fresh opportunity to improve public access whilst better protecting the environment.



TRAIL RIDERS FELLOWSHIP

In 1970 the Trail Riders Fellowship was established to conserve Green Roads for all users to enjoy, including motorcyclists, and to promote responsible and sustainable Trail Riding.

With over 10,000 members in 43 groups in England and Wales the organisation works with Central and Local Government authorities and other user groups and landowners to conserve and maintain Green Roads and to enhance the awareness and understanding of Trail Riding.

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