



## **PROJECT REPORT PPR747**

### **SHARP: A study of its effect on the UK motorcycle helmet market**

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## Contents

|  |    |
|--|----|
| Executive Summary  | 2  |
| 1. Introduction  | 4  |
| 2. Method  | 5  |
| Task 1: Desk Study   | 5  |
| Task 2: Surveys and interviews with helmet manufacturers, retailers and distributors           | 7  |
| Task 3: Consumer survey  | 9  |
| Task 4: Interviews and focus groups with police, motorcycle trainers, and Road Safety Officers | 10 |
| 3. Key findings  | 11 |
| 4. Discussion and recommendations  | 31 |
| 5. Limitations   | 34 |
| 6. Future research   | 35 |
| 7. References  | 36 |
| Appendices   | 37 |

## Executive Summary

The effectiveness of the SHARP safety rating scheme for motorcycle helmets was evaluated using four distinct tasks:

1. A desk based review of the application of the SHARP rating in marketing strategies employed by motorcycle helmet manufacturer and retailer websites and published press, both historically and currently (209 issues of Motor Cycle News, 20 websites, and over 8 million UK and global press and website outlets)
2. Computer-aided telephone interviews and in-depth interviews with manufacturers, retailers, distributors and dealers (20 CATI and 14 in-depth interviews)
3. Online survey of motorcycle helmet consumers followed by a segmentation analysis (573 respondents)
4. Interviews and focus groups with motorcycle trainers, police and Road Safety Officers (16 respondents)

Recommendations were developed based on the findings from these activities, with the aim of improving the impact and use of SHARP in relation to consumer purchasing decisions. The key findings are:

### **1. SHARP is important to customers**

The scheme is of value to helmet consumers, with almost 90% of consumer survey respondents who were aware of SHARP stating that the star rating was a very important or quite important factor in their purchasing decision.

### **2. The level of knowledge and awareness of SHARP varies**

A considerable proportion of helmet consumers are not aware of the SHARP safety scheme: 40% of the consumer survey respondents were not aware, and of those that were aware, 25% did not know whether their helmet had been SHARP rated. Manufacturers, retailers and distributors involved in the consultation had a good understanding of the SHARP scheme and tests, whilst awareness and understanding amongst police, trainers and Road Safety Officers tended to be more limited.

### **3. There are misconceptions related to SHARP**

Erroneous beliefs related to SHARP were found in all respondent groups. For example, almost half of consumers thought that helmets that have been rated by SHARP are safer than those that have not, and around a third believed that a helmet which has been awarded one star does not meet minimum safety standards. A desire was expressed for greater clarification on how to interpret the SHARP star ratings.

### **4. Good SHARP ratings are generally (but not always) important to manufacturers, retailers and distributors in selling helmets**

SHARP is generally seen as an important selling tool by manufacturers, retailers and distributors, with higher star ratings being desirable, and lower star ratings being excluded from marketing activities. However some manufacturers, retailers and distributors expressed indifference to whether their helmets had been SHARP rated, or what star rating they received.

### **5. Consumers are unsure of the additional benefits of a SHARP rating as all helmets on sale in the UK meet minimum safety requirements**

The value of SHARP was questioned by some consumers, who held the view that it is not necessary to consider the SHARP rating when all helmets legally on sale in the UK meet minimum safety requirements.

## **6. There are concerns over the SHARP test itself**

Concerns over the validity of the tests used to determine a SHARP rating were expressed by some manufacturers and consumers. Perceived issues with the test were mentioned (often based on a misinterpretation of the tests), as well as a feeling that the star ratings are not an accurate reflection of how well a helmet would protect motorcyclists in a 'real world' accident. Some manufacturers acknowledged that they design helmets with the aim of achieving a high SHARP star rating, and there was a misperception amongst consumers that this may be to the detriment of the helmet's overall safety.

## **7. There is a strong feeling that it takes too long for a helmet to be awarded a SHARP star rating**

Manufacturers, retailers, distributors and consumers commonly expressed the opinion that the amount of time taken for a helmet to be awarded a SHARP rating is too great, with examples given of helmets being discontinued before they receive their rating. Many retailers and manufacturers would appreciate being able to use the star rating as marketing during product launch.

## **8. There is overall support for SHARP being and remaining independent**

The independent nature of the SHARP scheme is valued by manufacturers, retailers and distributors. There is a desire from these groups for it to remain independent, in particular to gain and preserve consumer trust in the scheme. There were mixed opinions regarding whether manufacturers should have more say in which helmets are rated (largely due to the potential impact of this on the perception of independence) or whether rating should be mandatory. Some support was expressed by manufacturers and distributors for tests being paid for by manufacturers, although again this may have an impact on consumers' perception of independence.

## **9. The SHARP website is seen as very useful; the pocket guide less so**

Stakeholders provided positive feedback relating to the SHARP website, with 95% of consumers who had visited the website stating that they found it very useful or quite useful. The pocket information guide had been used by fewer consumer survey respondents than the website.

## **10. There is a need for more promotion of SHARP**

The need and desire for more promotion of the SHARP scheme was expressed across stakeholder groups. The general level of awareness of SHARP needs to be raised, as does the level of understanding of what SHARP testing involves and how the ratings should be interpreted. Seven recommendations were established:

1. Improve understanding of what SHARP does (Findings 2, 3, 6, 10)
2. Improve understanding of SHARP ratings and what these offer above minimum safety legislation (2, 4, 10)
3. Encourage RSOs and trainers to use SHARP in their activities, especially with new riders (2)
4. Promote SHARP to increase consumer awareness of it; use segmentation analyses to target marketing appropriately (2, 10)
5. Ensure manufacturers and retailers understand that SHARP is important to consumers (1, 4)
6. Maximise online presence, including use of online tools and social media (9, 10)
7. Investigate working with manufacturers to achieve faster testing/increased funding (4, 7)

## 1. Introduction

Motorcyclists represent one of the most vulnerable road user groups in the UK. Typically, motorcyclists represent just 1% of road traffic but account for 19% of fatalities. Of the motorcyclists that are killed, 80% receive impacts to the head and in 70% of these the head injury is the most serious injury (Chinn, 2001).

The Safety Helmet Assessment and Rating Programme (SHARP) motorcycle helmet rating scheme was launched by the Department for Transport in 2007. The aim of the scheme is to provide motorcyclists with:

- clear advice on how to select a helmet that fits correctly and is comfortable
- clear, impartial and objective information about the relative safety of motorcycle helmets available to riders in the UK.

While all helmets have to meet minimum safety standards, research in 2007 estimated that up to 50 lives could be saved each year if all motorcyclists wore the safest helmets available to them.

In order to be granted a SHARP rating, a helmet model undergoes 32 different impact tests, including various impact types, severities and helmet sizes. The test and assessment protocols are based on the findings of the COST327 study (Chinn, 2001), which is the largest and most up-to-date real-world road accident information for motorcycle helmets in Europe. The importance of each of the 32 tests is weighted according to its relevance to head injuries sustained in road accidents.

The Department for Transport commissioned the present study in order to assess the degree to which SHARP has influenced the UK motorcycle helmet market, including consumers, retailers, distributors and manufacturers.

### Report structure

The report provides the method for each task, the key findings, discussion, recommendations, limitations and suggestions for future research.

Tables and graphs showing the full findings from the desk study are provided in Appendix 1, along with a more detailed methodology.

Tables showing the responses to the CATI survey are provided in Appendix 2. These are accompanied by some descriptive text and, where applicable, a brief description of some corresponding in-depth interview responses and some quotes.

Tables showing the responses to the consumer survey are provided in Appendix 3.

A summary of the interviews and focus groups with trainers, police and RSOs is provided in Appendix 4.

Appendices 5 to 12 contain the research materials used.

## 2. Method

### Task 1: Desk Study

This task aimed to assess both the extent to which the SHARP rating scheme is used in the marketing strategies of the UK motorcycle helmet market, and the extent to which this influence has affected UK motorcycle helmet sales. The task was split into three key sub-tasks:

- Task 1a assessed the use of the SHARP rating scheme in historical press marketing strategies by reviewing Motor Cycle News (MCN) archives from 2007-2013.
- Task 1b determined the extent to which the SHARP rating scheme was incorporated in current marketing strategies through a review of exhibition marketing materials, MCN archives from 2014 and retailer and manufacturer websites.
- Task 1c aimed to investigate the influence of SHARP on the UK market through a review of current helmet model sales data.

Each sub-task adopted a structured approach to the collation, review and analysis of this data. This involved the identification of applicable databases and the interrogation of these databases through the use of standardised search strategies. Outcome measures (i.e. source, helmet and SHARP detail) were systematically recorded for analysis.

Outlined in the following sections is a methodological overview of the databases searched, search strategies employed and outcome measures analysed for each sub-task (further details can be found in Appendix 1).

### Databases

Task 1a investigated the historical application of the SHARP rating scheme in marketing strategies in the press by reviewing Motor Cycle News (MCN) issues published between 01/01/2007 and 31/12/2013, whilst Task 1b assessed the application of the SHARP rating scheme in current press marketing strategies by reviewing MCN issues published from 01/01/2014 to 31/12/2014. MCN was the preferred motorcycle magazine subscription for these tasks as it has the largest UK readership, with a net weekly reach of 390,000 people both across the internet and in print (National Readership Survey, 2015). As MCN prints weekly issues, a decision was taken to reduce the time spent reviewing all MCN issues, by only reviewing issues printed on alternate weeks (210 issues in total).

Task 1b further analysed the influence of the SHARP rating scheme on current marketing strategies by visiting stands at the MCN London Motorcycle Show 2015 (22 exhibitors), reviewing online retailer (ten websites) and manufacturer (ten websites) websites and reviewing output from all UK printed press and global web outlets between 10/01/2015 and 09/04/2015 (~8 million websites). This range of media types was selected to ensure a comprehensive overview of the marketing strategies that currently reference the SHARP rating scheme for product promotion.

Task 1c aimed to evaluate the influence of the SHARP rating scheme on UK motorcycle helmet sales by contacting several organisations to locate publicly available material that could provide this information. These included the European Association of Automotive

Suppliers (CLEPA), the Motorcycle Industry Association (MCIA), the Society of Motor Manufacturers & Traders (SMMT), the Retail Motor Industry Federation (RMIF) and the Global Industry Analysts Inc. (GIA, Inc.), supplementing this by directly contacting manufacturers ( $n=4$ ) and a distributor ( $n=1$ ). Manufacturers and distributors were reluctant to release commercially sensitive data and no organisation collected motorcycle helmet sales data at the model level; no sales data were therefore acquired to support this task. To analyse if helmets with lower SHARP scores are discontinued more often, the online retailer ( $n=10$ ) and manufacturer ( $n=10$ ) websites were interrogated for data on the current sales status of all helmets rated by the SHARP rating scheme.

### ***Search strategies***

All MCN issues were both manually and electronically searched for all instances where either helmets or the SHARP rating scheme was referred to by either the feature text or an embedded photo. All adverts and articles were included in this search strategy, whilst all supplements included with each issue were also reviewed. A keyword search strategy was used to electronically search the feature text of each reviewed MCN issue, including the following keywords:

- Helmet
- SHARP, S.H.A.R.P.
- Rating
- Star
- Safety
- Government
- DfT, Department for Transport

As the embedded photos within each issue were not electronically searchable, each issue was also manually searched by scanning all photos and adverts for references to either helmets or the SHARP rating scheme.

All potentially relevant exhibitor stands at the MCN 2015 exhibition were approached and a short survey performed to establish if exhibitors currently reference the SHARP rating scheme as part of their marketing strategy.

All helmets located on online retailer and manufacturer websites were manually searched for all instances where the SHARP rating scheme was referred to either in an embedded photo or in the technical specification of the helmet. The output from all printed and online media outlets were collected by TRL's press cutting service and systematically searched according the following keyword search strategy: "Helmet" AND ("SHARP" OR "S.H.A.R.P.").

### ***Outcome measures***

Outcome measures were systematically recorded from all sources. Outcome measures included details on each reference, the helmet and the source type of each reference. Data were further abstracted from each SHARP reference to gather information on the implementation of the SHARP rating scheme, including any publication of SHARP scores, the incidence of SHARP-specific marketing materials and the priority given to, and the general opinion created by, the SHARP rating scheme for each SHARP reference. Further data was also extracted from all references to record the incidence that any additional helmet safety features were referenced. Finally, comparative data were extracted for all



helmets from the DfT database of SHARP ratings, flip front latch scores and test dates. Further details on the outcome measures collected for each Task are included in Appendix 1.

## **Task 2: Surveys and interviews with helmet manufacturers, retailers and distributors**

Task 2 comprised in-depth interviews and computer-aided telephone interviews (CATI) with motorcycle helmet manufacturers, distributors and retailers. CATI and in-depth interview guides were developed by TRL with input from Public Knowledge and DfT. The CATI surveys were designed to gain views from distributors and retailers who were not available for an in-depth interview. The CATI surveys and in-depth interviews covered the same key areas:

- Marketing
  - Information used in marketing helmets
  - Importance of safety in marketing
- Consumers
  - Perceived importance of various helmet features
  - Popularity of various helmet types
- SHARP
  - Understanding of the scheme
  - Use in marketing
  - Perceived value to consumers
  - Effect on sales
  - Improvements

See Appendices 5, 6, 7 and 8 for the full interview guides.

Public Knowledge conducted participant recruitment and fieldwork. A desk search of manufacturers and distributors was carried out to gather contact details; UK based contacts were prioritised, but interviews included non-UK manufacturers. The CATI survey was extended to retailers to maximise sample size and an additional desk search to source contacts was carried out. To encourage participation, in-depth interviewees were given the option of a £40 charity donation or monetary incentive; the shorter CATI surveys were not incentivised.

The in-depth interviews took 25-50 minutes, with an average interview length of 40-45 minutes. The in-depth interviews were recorded (with the interviewees' permission) and transcribed. The CATI surveys took on average ten minutes.

Qualitative thematic content analysis was applied to the transcripts of the in-depth interviews. Thematic content analysis is a technique used to identify and analyse central messages or 'themes' that arise from the data. The process involves the following stages:

1. A detailed examination and analysis of the text (transcripts or notes)
2. Initial identification and construction of 'themes'
3. Re-examination of the text to corroborate themes and identify examples

#### 4. Formalisation and reporting of themes

Verbatim quotes are used in the results to illustrate themes where appropriate.

### **Task 2 sample**

#### *In-depth interviews sample*

Fourteen in-depth interviews were conducted, as shown in Table 1.

**Table 1. In-depth interviewees**

| Org. | Type                         | Additional information   |
|------|------------------------------|--|
| 1    | Manufacturer                 | One brand  |
| 2    | Manufacturer                 | One brand, distributed to 50+ countries, sell directly to retailers  |
| 3    | Manufacturer                 | One brand, distributed to ~80 countries  |
| 4    | Manufacturer                 | Two brands   |
| 5    | Manufacturer/<br>distributor | One brand, distribute own helmets only   |
| 6    | Manufacturer/<br>distributor | Three brands of helmet, also manufacture/distribute clothing   |
| 7    | Manufacturer/<br>distributor | One brand, helmets sold in ~35 countries   |
| 8    | Distributor                  | Two brands of helmet (also clothing)   |
| 9    | Distributor                  | One brand of helmet (also clothing) distribute to UK and parts of Europe   |
| 10   | Distributor                  | Import two brands of helmet, and manufacture/distribute clothing/accessories   |
| 11   | Distributor                  | Import one brand of helmet, also supply parts and accessories  |
| 12   | Distributor                  | One brand of helmet  |
| 13   | Retailer                     | Principally involved in motorcycle training, but also sell a variety of entry level helmets, as well as clothing/accessories |
| 14   | Retailer                     | Internet based with one retail shop; import various exclusive and mainstream brands  |

#### *CATI sample*

A total of 40 CATI surveys were conducted: 36 with retailers, and four with distributors. Respondents were identified as the most suitable individual to represent their organisation's views on marketing strategies. Manufacturers are a small group and were difficult to recruit. All manufacturers who took part in the consultation did so via the in-depth interviews.

The majority of respondents had worked for the organisation for at least a year, and the majority of organisations represented had been involved in the retail or distribution of motorcycle helmets for at least ten years.

### **Task 3: Consumer survey**

An online consumer survey was developed for motorcyclists who had purchased a helmet since 2007. The survey explored the following areas:

- Motorcycling experience
- Motorcycle helmet experience
- Attitudes to motorcycling
- SHARP
  - Awareness
  - Importance of SHARP in helmet purchase
  - Attitudes towards SHARP
  - Use of website/information guide
- Demographics

See Appendix 9 for the full survey, which took 10-15 minutes to complete. The survey link was disseminated to known motorcyclists of PanelBase (Public Knowledge's online panel) and TRL's participant database, as well as via the SHARP website and Twitter feed.

#### ***Task 3 sample***

A total of 573 motorcyclists provided usable responses to the online survey. These comprised a mix of ages, genders, riding experience, and helmet types used (see Appendix 3 for all responses)<sup>1</sup>.

#### ***Segmentation analysis***

A segmentation analysis was carried out to understand whether the survey sample could be segmented into distinct clusters based on their attitudes towards motorcycling.

Initial attempts at segmentation utilised the ten 'golden questions' from Christmas et al. (2009), a previous segmentation of a representative UK-wide sample of motorcyclists. Unfortunately the quality of clusters using these items was poor<sup>2</sup>, and therefore a pragmatic approach was pursued; the variables age, gender, bike engine size, and urban/rural mix of riding gave the best cluster solution. A 'fair' cluster quality was obtained. Further detail on the segmentation analysis can be found in Appendix 3.

This analysis suggested that there were two clusters of motorcyclist in the sample, with the features shown in Table 2.

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<sup>1</sup> The representativeness of the consumers who responded to the survey is not known; it may be that the sample is a good reflection of the whole population of motorcyclists in the UK, but this is not guaranteed.

<sup>2</sup> It is possible that this was due to the fact that the sample in this study was not representative in the way that the Christmas et al. sample was. For example the sample in this study had a greater proportion of female riders.

**Table 2. Segmentation of the sample based on survey responses**

| Cluster | N   | Description   |
|---------|-----|---|
| 1       | 227 | Riders who mostly ride on urban roads, tend to be younger <sup>3</sup> , mix of genders, and ride smaller machines <sup>4</sup> |
| 2       | 346 | Riders who ride rural and urban roads, are almost exclusively older, male, and ride larger machines                             |

#### **Task 4: Interviews and focus groups with police, motorcycle trainers, and Road Safety Officers**

Interviews and focus groups were carried out with representatives of the police, motorcycle training schools, and local authority Road Safety Officers (RSOs). Participant contacts were established through desk based research and contacted directly by telephone and/ or email. Participants were given the option of a £40 charity payment or monetary incentive. Interviews lasted for 30 minutes on average, and the focus group lasted for 90 minutes.

A separate interview/focus group guide was developed for each of the three groups (see Appendices 10 to 12). The guides were designed to explore the following areas:

- Knowledge of SHARP
- Usefulness of SHARP
- Safety initiatives involving SHARP
- Use of SHARP in training motorcyclists
- Equipment procurement
- Improvements to SHARP

Qualitative thematic content analysis was applied to the data from the interviews and focus group as described in the Task 2 methodology.

#### **Task 4 sample**

The Task 4 consultation was carried out with 16 stakeholders:

- 5 Road Safety Officers (interviews only; 6 to 20 years' experience, three based in Scotland, two based in the south of England)
- 5 motorcycle trainers (two interviews, one focus group; 3 to 10 years' experience, based in the south of England, mixture of advanced and CBT training)
- 6 police officers (interviews only; 13 to 30 years' experience, all rode a bike as part of their police role, represented Thames Valley, Metropolitan and Lincolnshire police forces, and different roles including road policing, casualty reduction officers and forensic collision investigators)

<sup>3</sup> Aged up to 35

<sup>4</sup> Up to 750cc

### 3. Key findings

Detailed results from the four tasks can be found in Appendices 1 to 4. Key findings have been extracted and collated here, and are supported by evidence from the various research tasks described above. Participant quotes are included throughout the report to support key messages.

#### Key finding 1: SHARP is important to consumers

The consumer survey found that the SHARP scheme is clearly valued by helmet consumers. Almost 90% of those that were aware of the SHARP scheme stated that the SHARP rating was very important or quite important in their decision to purchase the helmet, as shown in Figure 1. Only one respondent out of 155 stated that the SHARP rating was 'not at all important' to their purchasing decision.

*"They have helped me in choosing safer makes of helmets."* (Consumer<sup>5</sup>)

*"The SHARP rating system enables the buyer to make an informed choice when buying a helmet. This can only be a good thing."* (Consumer)

Despite SHARP clearly being highly valued by consumers, responses from some manufacturers, retailers and distributors indicated that they do not perceive the majority of consumers to consider SHARP to be an important part of their purchasing decision:

*"It's important to some and not important to others, I would say a 50:50 split."* (Distributor)

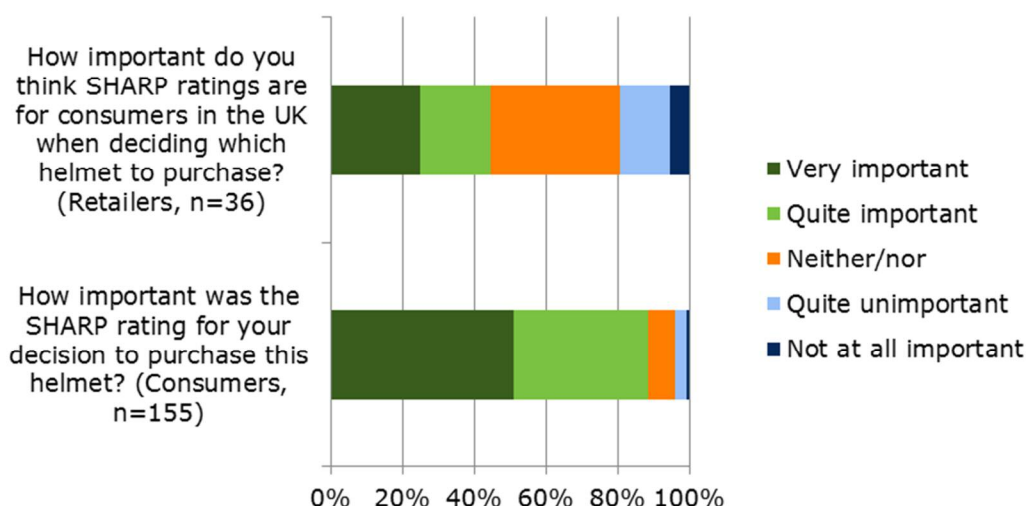
Although some were aware that SHARP is important to consumers:

*"It's become more and more important, I think people are listening to it as well."* (Retailer)

The discrepancy between how important those involved in selling helmets think SHARP is to consumers, and how important SHARP actually is to consumers (who are aware of it), is demonstrated in Figure 1. The proportion of retailers who felt that SHARP ratings are very important or quite important to consumers was exactly half of the equivalent proportion of consumers who were aware of SHARP (44% and 88% respectively). This suggests that increasing the proportion of consumers who are aware of SHARP and informing retailers that SHARP is important to consumers would be beneficial. Retailers' current perception may be driven by a large proportion of consumers (40%) simply being unaware of SHARP; SHARP ratings are important to the vast majority of consumers where they are aware of the scheme.

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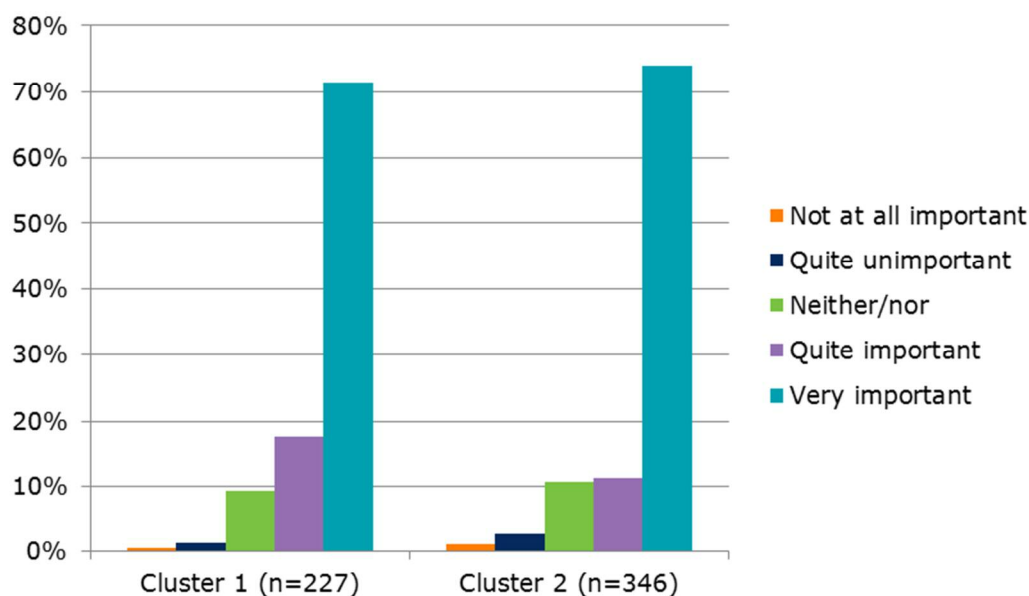
<sup>5</sup> Consumers were given the option to provide free text comments at the end of the survey.



**Figure 1. Importance of SHARP ratings to consumers**

Analyses were also run to establish whether the two clusters<sup>6</sup> differed on their answers to any of the questions about SHARP.

A statistically significant difference was found between clusters for the answer to the question "Please rate how important the SHARP rating was for your decision to purchase this helmet" (only respondents who had stated that their most recently purchased helmet had been rated by SHARP answered this question).



**Figure 2. Importance of SHARP rating in decision to purchase most recent helmet, by cluster**

Both clusters tend to rate SHARP as important in their decision, but Cluster 2 (older mostly male riders, bigger machines, more rural riding) are more likely to rate it as 'very important'.

<sup>6</sup> Cluster 1 ride mostly on urban roads, tend to be younger, mix of genders, and ride smaller machines. Cluster 2 ride on rural and urban roads, are almost exclusively older, male, and ride larger machines.

The final statistically significant difference found between clusters was in their attitudes toward SHARP. For this analysis, the responses to Q34 in the survey were examined. This question contained 20 items about SHARP with which respondents could indicate a level of agreement or disagreement. These items can be seen in the survey in Appendix 9.

Responses to these items were subjected to factor analysis. This is a statistical technique which establishes what scales with multiple items are actually measuring (for example whether each item is measuring something different, or whether multiple items are measuring an underlying variable). Full details on the factor analysis can be found in Appendix 3.

The analysis revealed that the Q34 scale measured two underlying factors. The first factor mainly focused on attitudes towards SHARP as it related to *safety*. The second factor focused on attitudes towards SHARP as it related to *more than just safety* (for example look/feel of helmets, and brand). It may be that some consumers are misperceiving SHARP ratings as being related to more than just safety, and are indicative of other qualities of the helmet.<sup>7</sup>

For both factors, Cluster 1 had significantly higher scores than Cluster 2; in other words Cluster 1 riders (younger, mixed gender, more likely to ride mainly in urban areas, smaller machines), despite having slightly lower importance ratings for SHARP in their own buying decisions (see Figure 2), agreed slightly more than Cluster 2 riders that SHARP was important for safety, and was important for things in addition to safety as well. One possible implication of this is that the brand may be more powerfully associated with both safety and with other features in these types of riders, and hence any future attempt to raise brand awareness may be better focused on Cluster 2 riders. However further properly focused research would be needed to be sure how to proceed.

## Key finding 2: The level of knowledge and awareness of SHARP varies

Whilst SHARP is valued by consumers that are aware of it, there is a considerable proportion of consumers that are not aware of the scheme, as demonstrated by the consumer survey responses shown in Table 3.

**Table 3. Awareness of SHARP**

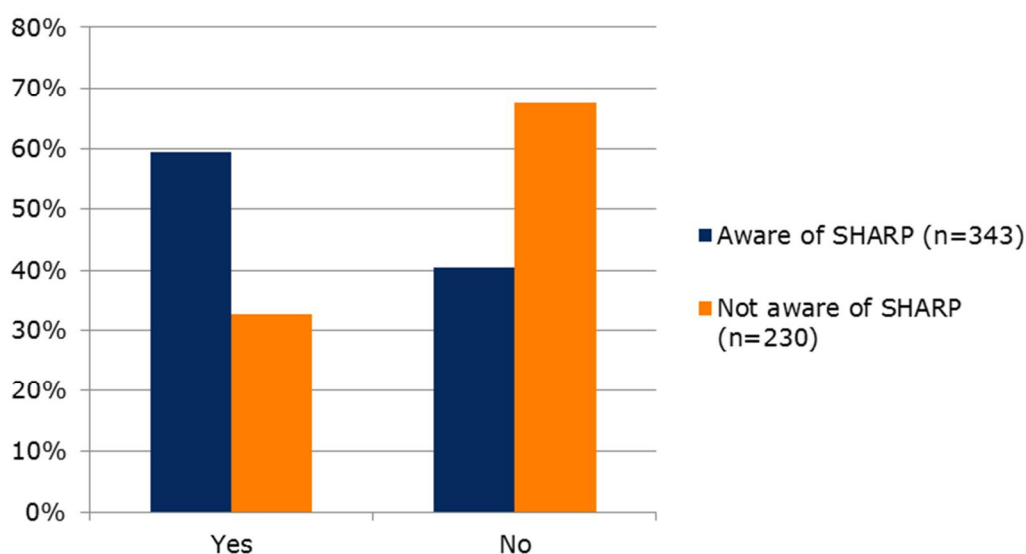
| Survey question   | N   | Responses               |
|---|-----|-------------------------|
| Are you aware of the SHARP helmet safety scheme?          | 573 | 60% aware               |
| [If aware] Has your most recent helmet been SHARP tested? | 343 | 64% yes, 25% don't know |

Of the whole sample of 573 motorcyclists, 40% were not aware of SHARP, and less than two thirds of these knew that their most recent helmet had been SHARP rated. This indicates that there is considerable potential for increasing the awareness of SHARP amongst motorcyclists. There are certain factors that appear to be related to whether

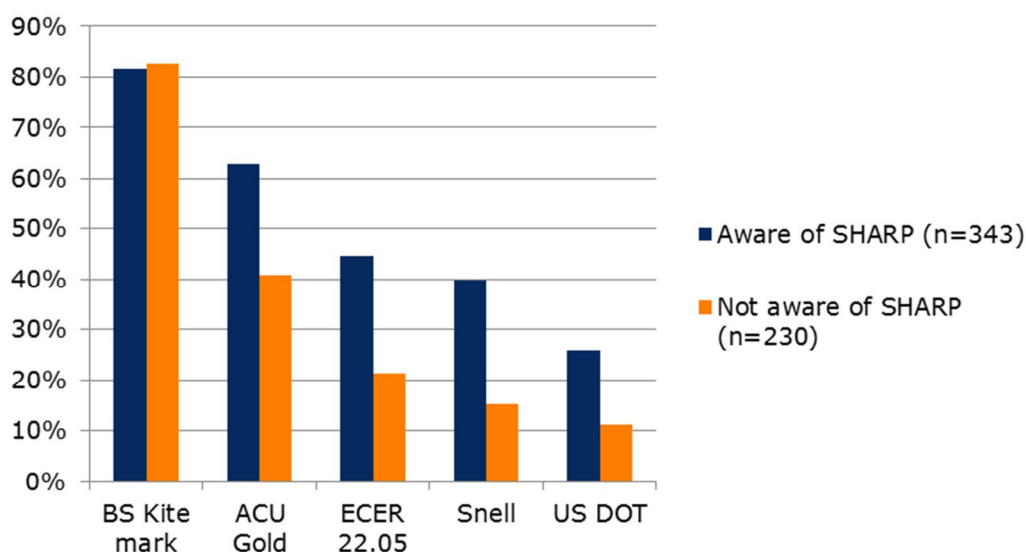
<sup>7</sup> The analysis employed here requires interpretation. It should be noted therefore that definition of this factor is based on the interpretation of those items loading onto it, and thus any conclusions regarding this being a 'misconception' on behalf of consumers should be drawn with caution.

motorcyclists are aware of SHARP, as shown in Figure 3 and Figure 4. These figures suggest that, as may be expected, those who are aware of SHARP tend to have safer attitudes towards motorcycling, taking part in additional training and having greater awareness of motorcycling safety issues. Almost 60% of respondents that had taken additional motorcycle training were aware of SHARP, compared to 40% of respondents that had not done so.

It is possible that the sample of consumer survey respondents may be biased towards those that are more likely to seek out safety-related advice. Those who were aware of SHARP were more likely to have heard of other standards (with the exception of the BS Kite Mark which, although no longer used for new helmets, was the standard that the most respondents were aware of).



**Figure 3. "Have you undertaken any additional motorcycle training other than that required to get your motorcycle licence?"**



**Figure 4. "What helmet safety standards are you aware of?"**



Figure 4 also shows that there is a high level of awareness of the British Standard Kite Mark and of ACU Gold; there was greater awareness of these standards than of the regulatory minimum standard of ECE Reg 22.05. This was reflected in some of the in-depth interviews, where these standards were perceived to be linked to a safer helmet<sup>8</sup>:

*"Generally, if I were looking for a helmet I'd be looking at one with a BSI Kite mark and the gold seal that you normally see on them."* (Trainer)

*"I've always been pretty used to accepting that it [helmet] has a British standard kite mark on it and as a bonus it has a gold star ACU certification on the side of it... I was quite happy with that."* (Police)

*"[SHARP is] not that well publicised, aware of Gold ACU sticker which I took as my main criteria for choosing a helmet."* (Consumer)

Amongst the interviewees, most manufacturers, retailers and distributors had a good understanding of the SHARP scheme and were able to describe it to some extent. Awareness and understanding amongst police, trainers and RSOs was more limited:

*"I know that it's a one to five safety rating. I know the helmets are tested as full-face or open-face helmets...there isn't anything else is there?"* (Trainer)

*"I just know that it's a safety test that's done on all helmets."* (Police)

References to SHARP helping and encouraging correct fitting of helmets were rare, although there was some awareness that SHARP aims to facilitate motorcyclists in ensuring the helmet fits well:

*"[Videos on the website] demonstrate where, for example, to take a measurement of your head before going to the shop to purchase."* (Road Safety Officer)

Motorcycle trainers tended to have a better knowledge of SHARP than RSOs and police, though not all trainers interviewed reported using it. This seemed to be dependent on the type of training they offered; those offering CBT (working mostly with new riders) were more likely to know about and use SHARP, while those offering Advanced rider training (working with experienced riders) were less likely to do so.

*"Before we take anyone out [we] make sure they're legal and comply with all the regulations. And I have yet to come across somebody that didn't have a suitable helmet...so I've never felt the need to talk too much about helmets and in particular SHARP."* (Trainer (Advanced))

### **Key finding 3: There are misconceptions related to SHARP**

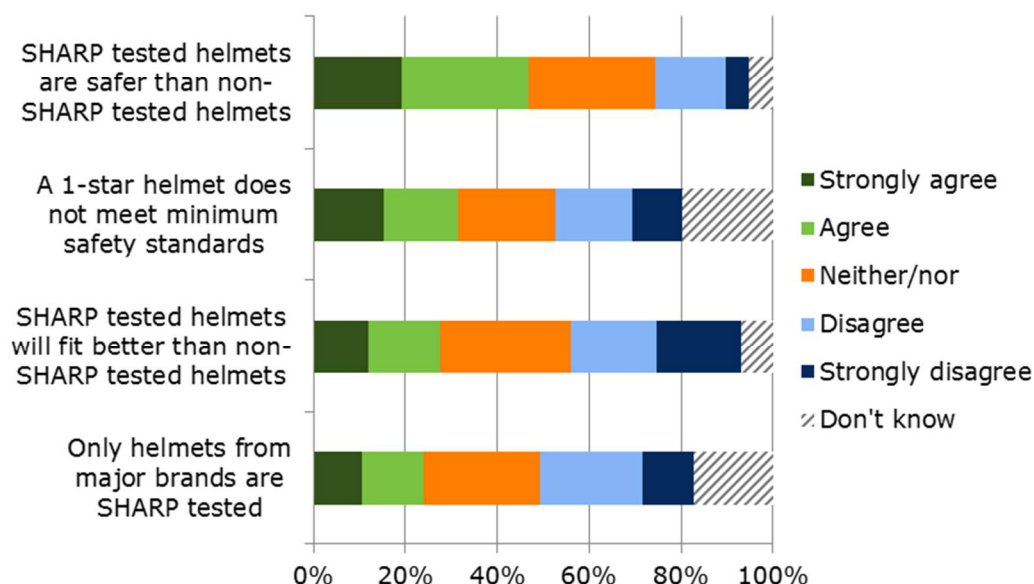
Whilst understanding of SHARP was generally good amongst manufacturers, retailers and distributors, a number of respondents in the other stakeholder groups expressed erroneous views of SHARP, for example:

*"The SHARP test gives you a rating on comfort, fit and safety."* (Trainer)

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<sup>8</sup> This may partly be due to the reference made to the kitemark on the gov.uk where the information on requirements for motorcycle helmets states that helmets should 'carry a mark equivalent to the BSI Kitemark' (<https://www.gov.uk/motorcycle-helmet-law>). It may also relate to the interest of many motorcyclists in motor sport (and activities such as 'track days') where ACU standards are required.

In particular, consumers held some false beliefs, as shown in Figure 5. Between 24% and 47% of respondents agreed or strongly agreed with the four statements shown. In addition, almost 20% did not know whether SHARP tested helmets are safer than non-SHARP tested helmets, or whether only major brands of helmet are SHARP tested. Only between 5% and 18% of respondents were confident in strongly disagreeing with the four statements.



**Figure 5. Agreement with statements illustrating false beliefs and lack of knowledge amongst consumers (n=343)**

These findings suggest that whilst consumers may be aware of SHARP as a concept and as a tool for selecting safer helmets, they have more limited understanding of the details of SHARP, including how helmets are selected and what different ratings mean. Desire was expressed across respondent groups for greater clarification on the SHARP tests, in particular how to interpret the star ratings:

*"The more information we have directly from SHARP the better. A better understanding of what they do and how they do it, helps us promote what we need to promote, and with new models and different shells it's something to think about."* (Manufacturer)

*"I think a bit more definition between what makes a difference between a three and a five star would be quite useful."* (Road Safety Officer)

*"I'd say you're pretty safe with a five star, I wouldn't know what the difference is between [the star ratings]."* (Retailer)

#### **Key finding 4: SHARP ratings are generally important to manufacturers, retailers and distributors in selling helmets**

As well as being important to consumers who are aware of the scheme, a good SHARP rating is generally seen as an important selling tool by manufacturers, retailers and distributors. There was some acknowledgement that SHARP is of particular value to consumers, and that consumer interest in the scheme is important if SHARP is to grow through manufacturer and retailer promotion.

*"The customer does ask for it, so it affects decisions the dealers make, for sure."*  
(Distributor)

*"More and more people are asking about it, it does then become more and more desirable for distributors to have their products tested and to have a rating, so the more that SHARP is pushed and the more that SHARP is known about, the more desirable it becomes, and naturally grows in that way. If the customers want it, then the distributors need to get it, so that they can have it on their helmets."* (Retailer)

*"SHARP matters to the end user, more than the dealers, to be honest. The dealers, some more than others, have a certain cynicism about some of the testing that goes on for SHARP, but the end users have connected with it...when [the helmets have] done well, obviously you want to highlight that, because it's another key selling aid."* (Distributor)

Manufacturers, distributors and retailers responding to the CATI survey rated safety schemes such as SHARP as the third most important piece of information when encouraging consumers to purchase a helmet (behind comfort and price). A good star rating is highly desirable, and lower star ratings tend not to be used in any marketing activities, with three stars being considered a cut-off point:

*"Three stars is like the limit. We will advertise that it's three stars 'cause it still is a safety rating. We just wouldn't promote it heavily like we would a five star. We'd push a four and a five star a lot more."* (Manufacturer)

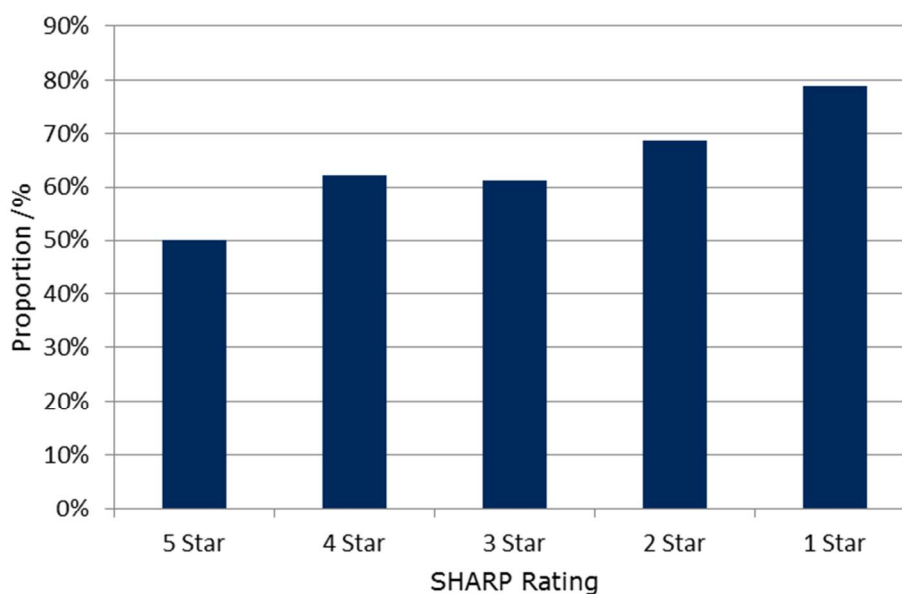
*"Three and above is considered pretty good. Four and five, people raise their eyebrows and say, it's good...anything less than that, they would consider poor."*  
(Distributor)

*"[We want all helmets to be 3 stars plus], because one of our most important schemes when we come to do publicity on helmets is the safety."*  
(Manufacturer/distributor)

*"If I got a one star, I wouldn't bring the helmet in again."* (Distributor)

*"[A one star rated helmet] is nothing to be particularly proud of, is it?"* (Retailer)

This may be supported by a correlation in the desk study findings that found that SHARP rated helmet models were more likely to be discontinued when associated with a lower SHARP rating score (Figure 6), with only 50% of 5 star SHARP rated helmet models discontinued since 2008, in comparison to 79% of models with a SHARP rating of 1. It is important to note, however, that further information from helmet model sales data is required to fully establish whether this correlation between lower SHARP scores and helmet discontinuation is in fact a causal relationship.



**Figure 6. Proportion of discontinued SHARP rated helmet models by SHARP rating**

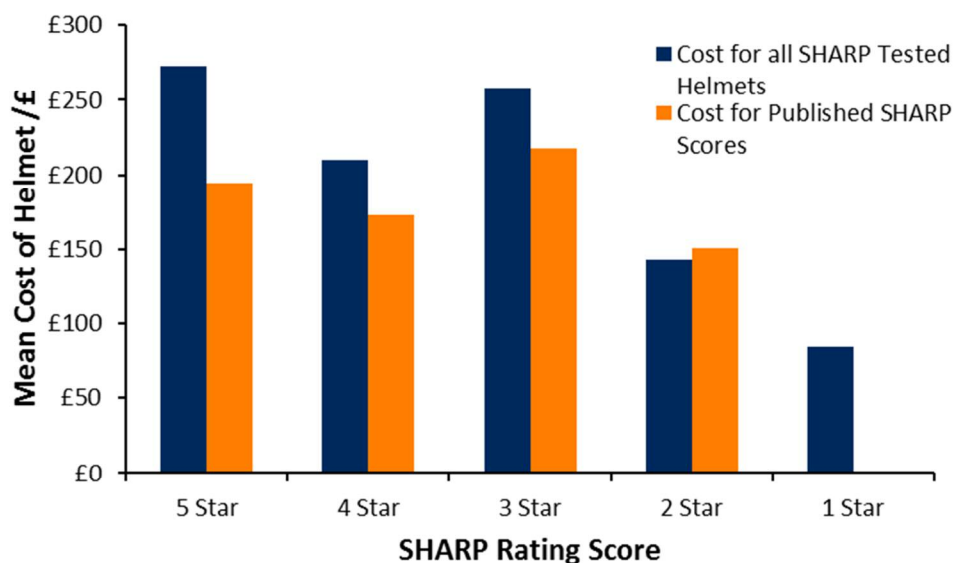
**Key finding 4a: Manufacturers, retailers and distributors particularly value high SHARP ratings for cheaper helmets**

There is generally an expectation that more expensive helmets should be safer. Therefore a high SHARP rating can be a very useful marketing tool for helmets at the lower end of the cost spectrum.

*"With some...brands...they'll be waving the figures around and probably sales will be driven by the fact that they have a nice cheap helmet and it has a nice star rating."* (Distributor)

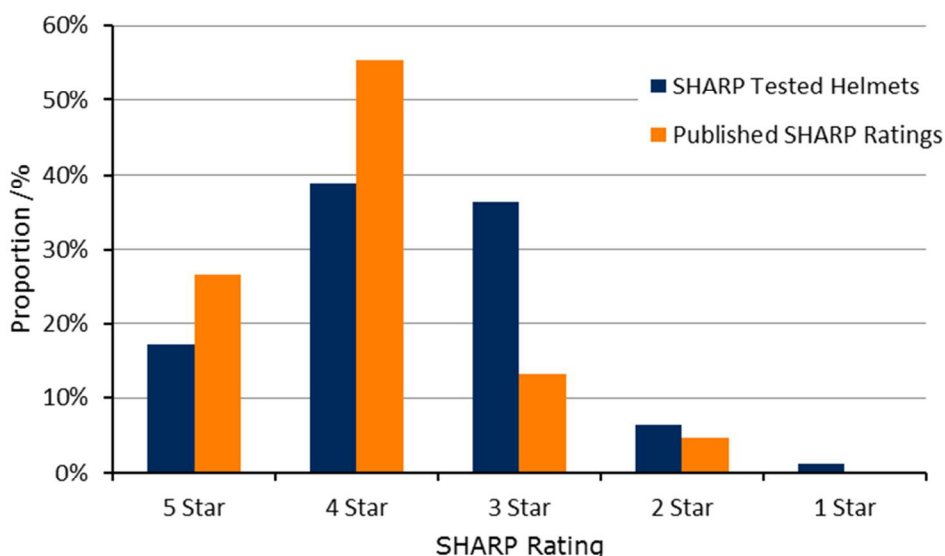
*"I'm happy to promote something I have on the shelf which has four stars, and is a fairly basic-priced helmet – it's not a high-end helmet, but it has a good rating."* (Retailer)

This was especially evident from the desk study outcomes where the decision to publish SHARP ratings alongside helmets was associated with both lower cost helmets and helmets with higher SHARP ratings. It was observed that SHARP ratings were more likely to be published alongside lower cost helmets both in MCN for 3, 4 and 5 star helmets (Figure 7) and by online retailers for 3 and 4 star helmets (Table 22 in Appendix 1).



**Figure 7. Comparison of costs between mean cost of all SHARP rated helmets and the mean cost of those published in MCN by SHARP rating (2007-2014)**

This was supported by observations that SHARP ratings were more likely to be published alongside helmets with higher SHARP scores, with the decision to publish SHARP scores associated with 4 and 5 star helmets in MCN (Figure 8), 4 and 5 star helmets for online retailers and 5 star helmets for manufacturer websites (Table 21 in Appendix 1).



**Figure 8. Comparison of proportions of all SHARP rated helmets and MCN published SHARP rated helmets (2007-2014)**

**Key finding 4b: Good SHARP ratings are not important to all manufacturers, retailers and distributors**

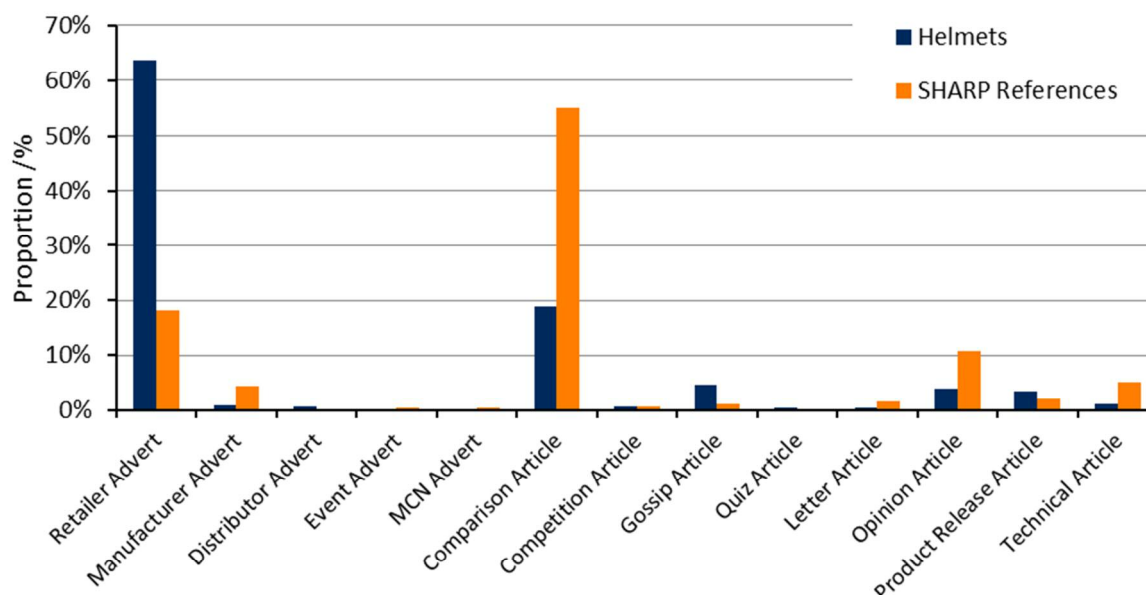
CATI respondents (distributors and retailers) were asked how important SHARP ratings are to their sales of motorcycle helmets in the UK. A quarter of the 36 retailers felt that it was quite unimportant or not at all important. Just over a quarter felt it was neither important nor unimportant, with the remaining 47% stating that it was very or quite important. Some manufacturers are not concerned with achieving a high SHARP rating for their helmets, as illustrated in the following quotes:

*"People ask us why [our brand] doesn't have a five star SHARP rating, what we have to say is, we have our own philosophy about helmet design, helmet protection, and unfortunately it doesn't fit the way SHARP evaluates."* (Manufacturer)

[You have some products tested by SHARP] *"To be honest I don't know, because I don't care about SHARP."* (Manufacturer)

*"[Brand name], which is one of the brands I stock, is not even listed on the SHARP website."* (Retailer)

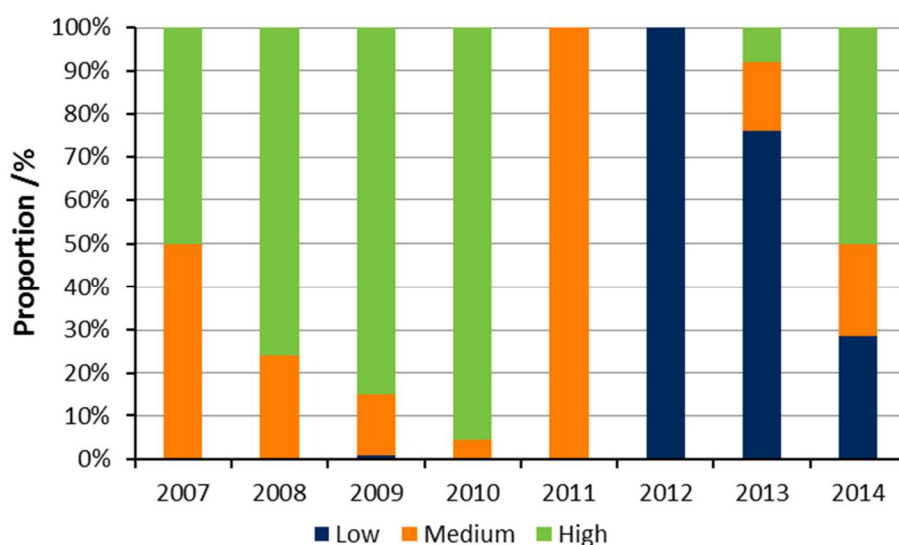
As noted in key finding 1, there was also a (mis)perception that SHARP is not important to a considerable proportion of consumers (see Figure 1). This was supported by evidence from the desk study showing that, regardless of media type, references to SHARP by manufacturers, retailers or distributors were both rare and of low priority. In MCN publications, retailer adverts focused primarily on the promotion of helmet designs rather than on helmet safety, whilst manufacturers and distributors rarely referenced the SHARP rating scheme (Figure 9). For example, Figure 9 shows that 63% of all helmet references were referenced by retailer adverts in comparison to 18% of all SHARP references. When reviewing online retailer and manufacturer websites, only 10% of online retailers and 30% of manufacturers were observed to have SHARP dedicated webpages, whilst only 10% of online retailer and manufacturer helmets referred to the SHARP rating scheme (Table 19 in Appendix 1). Furthermore, at the MCN London Motorcycle Show 2015, exhibitors stated that they do not actively promote either the SHARP rating scheme, or helmet safety in general, when talking with visitors at their stand (Appendix 1).



**Figure 9. Proportion of MCN references to 'helmets' and the SHARP rating scheme stratified by source type (2007-2014)**

Finally, the lack of references to the SHARP rating scheme by manufacturers, retailers and distributors is further compounded by a recent reduction (2011-2013) in the priority given to the reference to the SHARP rating scheme (i.e. location of the SHARP reference in the text) by both MCN publications (Figure 10) and online retailer and manufacturer websites (Table 20 in Appendix 1). When considering data from 2014, however, it is

clear there has been a recent increase in high priority SHARP references (i.e. where the reference to SHARP is considered to be prominent in either the technical description or webpage layout), which may indicate a recent escalation in the perceived importance of the SHARP rating scheme to manufacturers, retailers and distributors.



**Figure 10. Priority given to MCN references to the SHARP rating scheme (2007-2014)**

### **Key finding 5: Consumers are unsure of the additional benefits of a SHARP rating as all helmets on sale in the UK meet minimum safety requirements**

Some respondents were not clear on the value of SHARP when all helmets on sale in the UK should meet minimum safety criteria:

*"I think the European rating is enough."* (Distributor)

*"All helmets are tested to a minimum standard. So any helmet is safe. One safety standard is enough, otherwise it just becomes confusing."* (Consumer)

*"They have to be tested to go on sale."* (Police)

*"Generally, if I were looking for a helmet I'd be looking at one with a BSI Kite mark and the gold seal that you normally see on them."* (Trainer)

Again, increased knowledge of the SHARP scheme would address this issue, encouraging consumers and other stakeholders to consider safety aspects over and above the minimum requirements.

### **Key finding 6: There are concerns over the SHARP test itself**

Some manufacturers and consumers expressed concerns over the validity of the tests used by SHARP. Whilst many manufacturers felt that the SHARP tests were appropriate (noting that the protocol was based on COST327 data), some manufacturers focused on perceived issues with the tests:

*"At the moment, they only test limited impact sites, five...but people can hit anywhere on the helmet, above the helmet."* (Manufacturer)



*"SHARP only does ambient tests...you must prepare for cold weather like -20° and also hot weather 50°...so I can't accept a rating of SHARP that is not doing the tests as we must do." (Manufacturer)<sup>9</sup>*

Consumers conveyed concerns that the SHARP tests may not translate to 'real world' accidents. These concerns seem to be perpetuated by discussions in online forums for example:

*"My understanding of the SHARP ratings from discussions I have seen on the internet is that the test process is limited and not a reliable indicator of the total protection offered by a helmet." (Consumer)*

*"I believe that the SHARP system is a good step forward...but it is not 100% accurate. The required multiple impact tests do ensure a helmet is strong externally, but does little for internal protection." (Consumer)*

*"I have read a lot on bike forums that the testing under the Sharp system is meaningless and not modelled on the type of impact likely to be experienced." (Consumer)*

*"Lots of discussion amongst advanced riders as to whether SHARP testing methodology is representative of real world protection." (Consumer)*

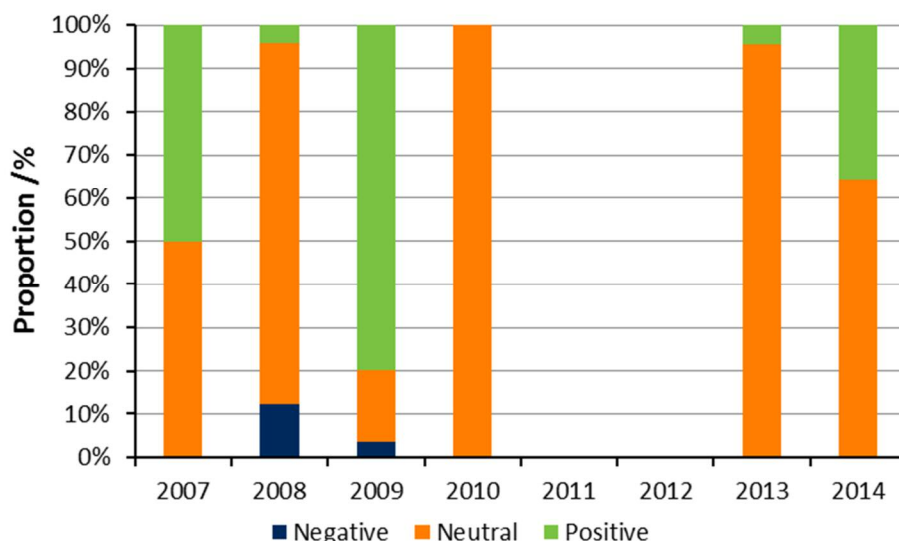
By improving knowledge amongst all stakeholders of what the SHARP tests involve and the rationale behind their design, such concerns may be allayed.

The desk study found evidence suggesting historical concerns about the SHARP testing scheme, with both a spike in negative opinion articles published in MCN from 2008-2009, just after the release of the SHARP rating scheme, and no references made at all to the SHARP rating scheme in MCN articles published between 2011-2012 (Figure 11). When considering recent data, however, this study found a recent increase in the proportion of positive opinion articles published in MCN during 2014, which may indicate a recent improvement in the way that SHARP is perceived by customers, manufacturers, retailers and distributors.

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<sup>9</sup> It should be noted that the regulatory tests are performed at high and low temperatures, and therefore the basic performance of the helmet at extreme temperatures is assured, even though this is not tested by SHARP.





**Figure 11. Opinion created by MCN articles referring to the SHARP rating scheme (2007-2014)**

**Key finding 6a: There are concerns that optimisation of helmets to achieve a higher star rating would not result in better safety**

Some manufacturers acknowledged that they design helmets with the aim of achieving a high star rating:

*"We made some efforts in order to design the helmet to achieve five stars...I don't have any doubt we currently design helmets in order to achieve a particular rating."* (Manufacturer)

*"All the manufacturers now know what's tested by SHARP so they can design new helmets to achieve a higher rating, if they're driven by that."* (Distributor)

If it is accepted that the ratings translate to 'real world' safety, this would be beneficial. However, consumers in particular felt that 'designing to pass' may lead to helmets with a high star rating which are not necessarily safer:

*"Helmets can, and are, designed and optimised to achieve the best SHARP test rating. This does not mean the helmets are any safer."* (Consumer)

*"It is possible that helmet manufactures are only manufacturing to pass the test and actually engineering out safety factors that could well be far more important in a real world testing scenario (i.e. a crash)."* (Consumer)

*"Once you as a manufacturer know where those [strike] points are, you can then build your helmet accordingly, you can make it strong in those points so it will score highly, but it might be an inferior helmet."* (Distributor)

There is a perception among some motorcyclists that the helmet may be optimised to the SHARP test conditions, and in particular the impact sites used in the SHARP tests. It may be worth reviewing the information provided about the tests to clarify that:

- The tests are run at a wide range of impact severities (much wider than the legislative tests)

- DfT dismantle each helmet model to ensure that it does not just have SHARP-specific protection zones and that a similar level of protection would be expected at other impact sites.

### **Key finding 7: There is a strong feeling that it takes too long for a helmet to be awarded a SHARP star rating**

A fundamental issue raised by most manufacturers, retailers, distributors and consumers related to the amount of time taken for helmets to be rated by SHARP. Stakeholders expressed frustration that helmets could have been discontinued by the time they received a SHARP rating, and would like to have the option of including the SHARP rating in the marketing material at product launch:

*"They're slow at rating products...[sometimes] by the time they receive a SHARP rating, they're either discontinued or a new model has come out and it's not really relevant anymore."* (Distributor)

*"Helmets can have an incredibly short lifespan...it can be...gone within 12 months. They're not responding fast enough to get the testing done. By the time they've done the testing and published the results, the helmet can be off the shelves."* (Distributor)

*"It would be nice [at product launch]...to be able to say, 'by the way it's also SHARP rated, these are the results.' You can't, so you're missing that bit of information."* (Manufacturer)

Consumers expressed similar sentiments:

*"Most of the helmets in the SHARP list seem to be discontinued models...what is the point of rating if...the SHARP rated models are no longer available."* (Consumer)

*"The new helmet I am looking at is the [model] but it has not been tested yet. I am waiting impatiently"* (Consumer)

Establishing a process for rating new helmet models would be well received by consumers and manufacturers, but care would be required to ensure that any solution maintained both the actual and the perceived independence of the SHARP rating (see key finding 8).

### **Key finding 8: There is overall support for SHARP being and remaining independent**

Manufacturers, retailers and distributors value the independence of the SHARP scheme, and expressed a desire for it to remain independent so that consumers can maintain their trust in the scheme:

*"To us it's really important for the SHARP rating to be independent and to remain independent."* (Manufacturer)

*"With SHARP being a totally independent benchmark, and because of that, you know you can rely on it as a totally independent benchmark."* (Manufacturer)

*"That's a real positive...[SHARP have] got to go to the shop and buy the product. So I think that gives it some integrity for sure."* (Distributor)

**Key finding 8a: There are mixed opinions over whether manufacturers should have more say in the choice of helmets that are tested**

Just over half of retailers (58% of the CATI sample of retailers) agreed that manufacturers should have more say in which helmets get tested. The in-depth interview responses indicated that it would sometimes be useful for manufacturers to request that helmets are tested if they feel that they are being 'left behind':

*"Our helmets haven't been tested over the last couple of years, we seem to have got left behind, and all our competitors...can advise their dealers of what the SHARP rating for each of their helmets is." (Distributor)*

However such a system may have an impact on the perceived independence of SHARP, with manufacturers potentially designing certain helmets to achieve a higher rating, and requesting that these helmets are tested.

**Key finding 8b: There are mixed opinions on whether testing should be mandatory**

Distributors and retailers responding to the CATI survey were asked whether it should be mandatory for all helmets on sale in the UK to be included in the SHARP scheme. Over two thirds of retailers said 'yes'. This was reflected in the in-depth interviews, with some support for mandatory rating of all helmets but also some opposition.

*"Yes [SHARP should be mandatory] because they are more detailed tests, our manufacturers are making very good quality helmets...a lot of the helmets that are on the market are EC approved but aren't so safe as others." (Manufacturer/distributor)*

*"The whole point of it is that it's meant to be independent, so if you then start to ask the manufacturers and distributors which ones should and shouldn't be tested, your manufacturers will know which ones are more likely to perform better and worse, so it becomes less independent and then I don't see the point." (Retailer)*

There were also suggestions of extending or replacing the current ECE regulations:

*"It depends, are you just duplicating testing, when the best thing to do would be to take the ECE and add on the tests independently, with someone like SHARP, but for the whole of Europe and not just for the UK." (Manufacturer)*

*"We're almost 15 years now since 22.05, so there's definitely, we're due, I think we're due anyway, to have something that's an improvement." (Distributor)*

*"I don't think it should [be mandatory], no, because if you have the ECE standard, which is the standard, I don't think you then need another standard, I don't think you need two standards." (Retailer)*

Consumers who were aware of SHARP were asked whether they agreed or disagreed with the statement 'if all helmets were SHARP tested it would help me choose a safer helmet'. Only 8% of respondents disagreed or strongly disagreed, while 71% agreed or strongly agreed, indicating that mandatory testing would be supported by consumers.

### **Key finding 8c: There is some support for manufacturers paying for tests**

Around half of the retailers that took part in the CATI survey felt that, if it were possible, companies would pay for a helmet to be SHARP rated if it were not selected for test. Again such a system may have an impact on consumers' perception of the independence of SHARP, depending on how it was implemented. In-depth interviewees expressed some support for manufacturers paying for SHARP ratings:

*"Yes, it [paying for testing] is something that can work...it needs to be agreed before with a contract between the manufacturer and SHARP. So if the manufacturer agrees, SHARP can pick from the shops, and the company pays."* (Manufacturer)

*"I would not have an issue with [paying for testing]. I would think that the retail purchasing public would look at it different though. I always said that if there was a funding issue with the SHARP rating system, then it should be funded by the motorcycle industry, by the helmet manufacturers themselves...however, again, if the general public know that it's being funded by the helmet manufacturers, then it then ceases to be, in their mind, a total independent benchmark."* (Manufacturer)

*"Like NCAP, they would have to work with the manufacturers, in order to get the star rating and get the stuff done so that it could be done prior to going to market."* (Distributor)

### **Key finding 9: The SHARP website is seen as very useful; the pocket guide less so**

There was positive feedback from stakeholders relating to the SHARP website, which is felt to be clear and easy to use:

*"The website is easy enough to use, it explains everything, it explains the tests and it explains the zones, and gives the ranking, so yes, I think it's pretty simple to use."* (Retailer)

*"The website for SHARP is very, very clear so you can actually really understand it."* (Distributor)

*"We talk to them about how to fit them [helmet] and what have you, which is also on your website which is also a great tool."* (Trainer)

*"[The SHARP website is] good, particularly the video clips which demonstrate where, for example, to take a measurement of your head before going to the shop to purchase."* (Road Safety Officer)

*"I found the SHARP website very useful to compare different helmets from different manufacturers by sorting by star rating and then looking at different helmets in my price range. I'd recommend the website to any rider looking for helmet information."* (Consumer)

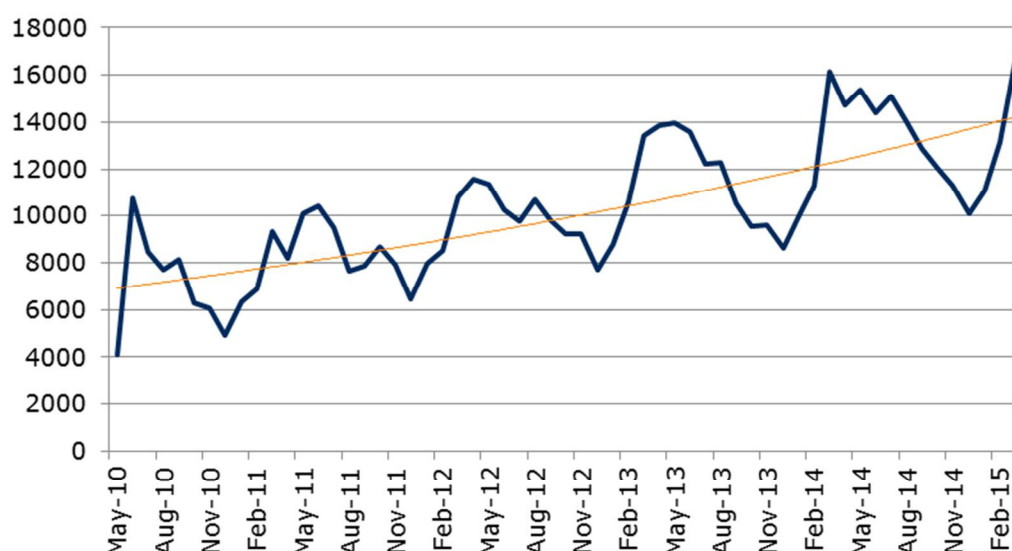
*"Most of us have iPhones and stuff so we can bring the link up and have a quick look at it and if they have their helmet there we'll look their helmet up and see what the safety rating is."* (Trainer)

A suggestion for additional web-based and interactive SHARP materials was also made:

*"If there was some kind of novel and interesting YouTube video or YouTube material...more interactive stuff."* (Road Safety Officer)

The website had been visited by 43% of consumers who were aware of SHARP (and 26% of all respondents). Of those that had visited the website, 95% stated that they found it quite useful or very useful, as shown in Figure 13. None of the respondents found it 'not at all' useful, and 1% found it not very useful.

Respondents were asked how they first found out that their helmet had been SHARP tested. One third stated that they found out through the SHARP website, while 37% stated it was advertised by the manufacturer or by the place they bought it (including the rating being displayed on the helmet). This indicates that retailer or manufacturer promotion is important in promoting SHARP, in addition to the SHARP website. The number of visits to the SHARP website has been steadily increasing over recent years, as shown in Figure 12. There are clear seasonal cycles in the number of visits, but on average it has increased from around 7,000 to 14,000 visits a month over a five-year period<sup>10</sup>.

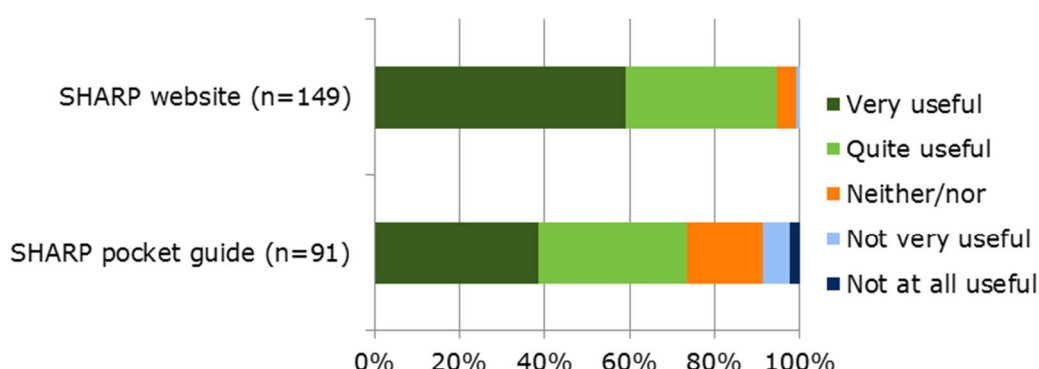


**Figure 12. Number of UK visits per month to the SHARP website, May 2010 - February 2015**

The SHARP pocket information guide was also rated as being generally useful, although not as useful as the website. The pocket guide had been seen by 26% of those who were aware of SHARP (and 16% of all respondents). Of those that had seen the guide, 74% stated that they found it quite useful or very useful. Nine percent of respondents found it not at all or not very useful.

*"People with the SHARP card aren't that interested in it."* (Road Safety Officer)

<sup>10</sup> This does not necessarily mean a higher proportion of motorcyclists are visiting the website – data on total motorcycle sales over this period would be required to draw any such conclusions.



**Figure 13. Consumer ratings of website and pocket guide usefulness**

The pocket information guide tends to be disseminated at motorcycle shows and through website requests from motorcycle trainers etc. While website hits from the UK have been increasing over time (see Figure 12), it is difficult to ascertain how many motorcyclists see or use the pocket guide, although it is reported to reach almost 20,000 people a year (DfT, in communication).

While the pocket guide is updated annually, the website can be updated more regularly to reflect new SHARP ratings for consumers. The information in the pocket guide relating to helmet fitting and comfort is consistently relevant and could become the focus of the pocket guide, with a QR code or easy link to the up-to-date helmet ratings on the website.

Interestingly, when examining the proportion of people in each cluster who reported visiting the SHARP website, or being given a SHARP pocket information guide, while looking for a new helmet, the opposite pattern seems to emerge to what might be expected from the findings on perceived SHARP importance (see Figure 1). In both cases, Cluster 2 (those who rated SHARP as more important in their buying decision) were less likely than Cluster 1 to utilise these resources. Chi-square tests were significant in both cases ( $p=0.003$  and  $p<0.001$  for the association between cluster and website usage, and cluster and pocket information guide respectively). This may be due in part to Cluster 1 representing younger riders.

**Table 4. Association between cluster and visiting SHARP website/being given a SHARP pocket information guide when looking for a new helmet (% responding 'yes')**

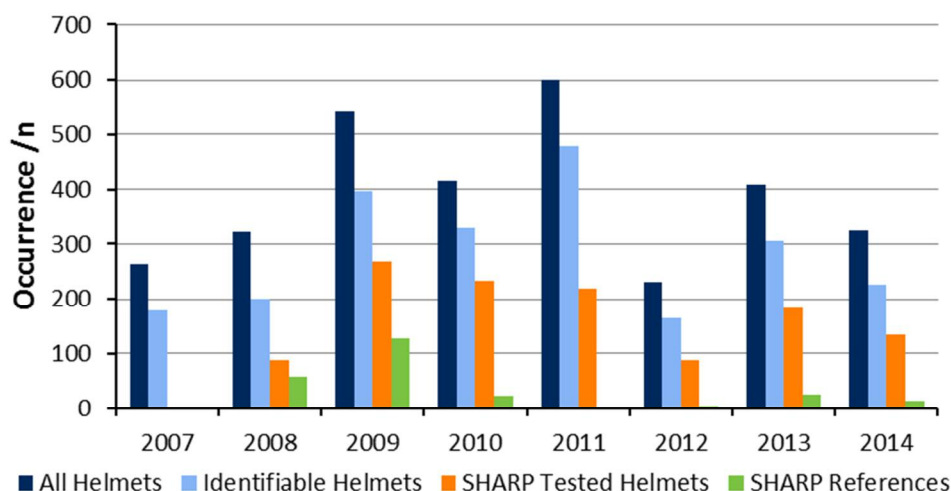
| Cluster   | SHARP website? | Pocket information guide? |
|-----------|----------------|---------------------------|
| 1 (n=134) | 51%            | 41%                       |
| 2 (n=209) | 38%            | 17%                       |

### Key finding 10: There is a need for more promotion of SHARP

The current incidence of references to the SHARP rating scheme is low across all media types, with 11% of MCN published articles, 10% of online retailers, 9% of manufacturer websites, 0% of exhibitors, 0% of MCN published adverts and just two UK printed press and global web outlet search hits referencing the SHARP rating scheme. On examination



of the historical data, however, this research found a peak in the incidence of MCN references to the SHARP rating scheme during 2009 (23%), with a considerable drop off in incidence (4%) since this peak (Figure 14).



**Figure 14. Yearly occurrence of MCN references to the SHARP rating scheme, when compared to MCN references to all helmets, all identifiable helmets and all SHARP tested helmets (2007-2014)**

As stated previously, the need for more promotion is reflected in the consumer survey findings that 40% of all consumer respondents were not aware of SHARP, and 25% of those who have purchased a helmet since 2007 did not know whether or not it had been rated. The need for SHARP to be better promoted was also clearly communicated during the stakeholder in-depth interviews and through consumer comments:

*"The SHARP scheme is great but I completely forgot about it when buying my last helmet. Had I been reminded I would have looked at it for sure"* (Consumer)

*"It's just not being chunked out there. Not enough people know about it."* (Trainer)

*"SHARP do not promote themselves as well as they could do."* (Trainer)

*"They aren't well enough known. Need major publicity."* (Consumer)

*"Not that well publicised, aware of Gold ACU sticker which I took as my main criteria for choosing a helmet."* (Consumer)

*"All helmets on sale in the UK should have their SHARP rating attached...very rarely is the SHARP rating of helmets mentioned either in adverts or reviews in the M/C press."* (Consumer)

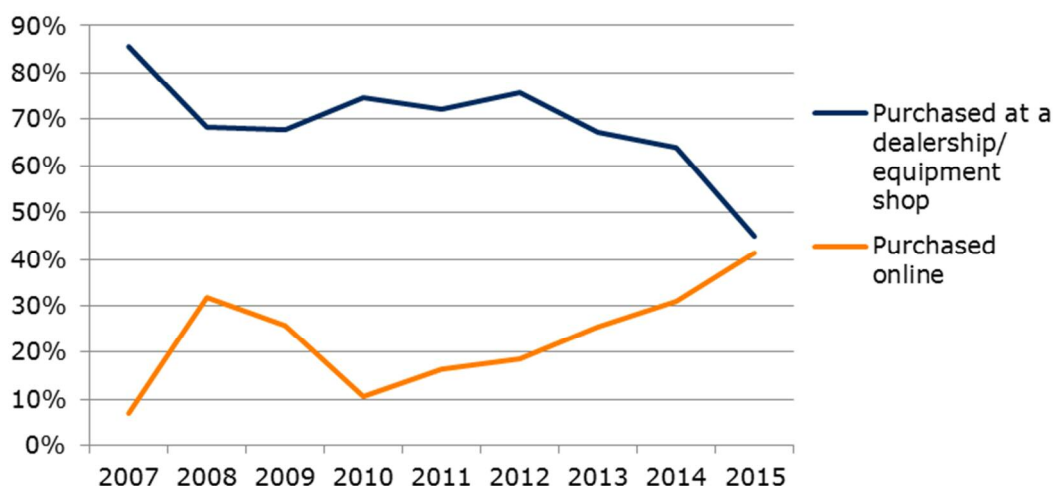
It is also important that the motorcycle industry has confidence in the future of SHARP. There are qualms about the long-term presence of SHARP:

*"Not sure how long the image of SHARP or how long the reputation of SHARP would survive."* (Manufacturer)

Members of the motorcycle helmet industry may be reticent to invest time or money in actively promoting SHARP ratings if they feel it may not endure.

Suggestions as to how promotion could be achieved were put forward, including through retailer stores and rider training schools. Overall, two thirds of consumers surveyed

stated that they purchased their most recent helmet from a motorbike equipment shop or dealer, but this proportion has been decreasing over time (Figure 15). The proportion of consumers purchasing their helmet online has increased over the same time period. Therefore promotion of SHARP by retailers both in-store and online would reach a large proportion of consumers, as would online promotion by manufacturers. An online presence for SHARP is becoming increasingly important.



**Figure 15. Point of purchase for most recent motorcycle helmet, 2007-2013 (n=573)**

It was felt that motorcyclists should be made aware of SHARP at the very beginning of their riding career, so that it is always something that they are aware of and can consider when purchasing a helmet:

*"More often than not they [learner motorcyclists] would not know anything about what SHARP did, who SHARP were." (Trainer)*

*"That [introducing riders to SHARP] is down to people like us who talk to students at the very beginning." (Trainer)*

*"I think that that would be quite an easy way for that to be done, through riding schools and through people that are approved training bodies for CBTs." (Road Safety Officer)*

*"Perhaps something that the SHARP scheme could be promoted through upper secondary school as well, it's probably quite a good place... schools can maybe make more reference to young riders and that would be an appropriate platform to include elements about SHARP." (Road Safety Officer)*

*"I think through stores that sell helmets and perhaps training centres might be the best way to get messages out to ensure consistency, because not everybody has a RSO in order to proactively promote schemes such as SHARP." (Road Safety Officer)*



## 4. Discussion and recommendations

The results of four research tasks have provided support for ten key findings related to the importance, knowledge and awareness of SHARP to consumers and manufacturers, retailers and distributors. .

SHARP is a safety ratings scheme developed for the benefit of consumers. It aims to 'provide motorcyclists with independent and objective advice' (SHARP website), and is an important tool for consumers when purchasing a helmet. However, crucially, it can only be an important tool if consumers are aware of the scheme. Manufacturers, retailers and distributors have an important role to play in improving consumer awareness of SHARP.

Improved awareness of SHARP amongst consumers is a key recommendation. This is broken down into:

- Improving understanding of what SHARP does (to dispel any misconceptions surrounding issues such as how helmets are chosen for testing and how applicable the ratings are to the 'real world')
- Improving understanding of the star rating system used by SHARP, and how these relate to what the SHARP test offers above minimum legislation (to dispel any misconceptions relating to how SHARP ratings should be interpreted, and how SHARP ratings provide safety information over and above that provided by testing to meet mandatory legislation requirements)
- Encouraging RSOs and training schools to use SHARP in their activities, especially with new riders (to introduce motorcyclists to the SHARP scheme at the beginning of the riding career, and to demonstrate that SHARP is valued by motorcycling and road safety professionals)
- Promoting SHARP to increase consumer awareness of it, using segmentation analysis to target marketing appropriately (to ensure that overall awareness of the existence of SHARP is improved)

The above recommendations are targeted primarily at consumers, but other stakeholder groups also have gaps in knowledge and awareness that need to be addressed, and so any efforts to improve knowledge and awareness of SHARP should not focus solely on consumers. In particular, manufacturers and retailers tended to perceive SHARP as less important to consumers (who are aware of it) than is actually the case (according to the survey findings), which may reduce their promotion of SHARP. Therefore a further recommendation is:

- Ensure manufacturers and retailers understand that SHARP is important to consumers (and provide tools and options to promote and explain SHARP to consumers through their websites and retail outlets)

It was found that the SHARP website was well-liked across stakeholder groups, however there is scope for increased online presence. There is an upward trend in the proportion of helmets being purchased online, and so promotion of SHARP through manufacturer and retailer websites is crucial, as reflected in the next recommendation:

- Maximise online presence, including use of online tools and social media

SHARP currently uses Twitter, but an increased online presence through other social media sites such as Facebook and Instagram would further increase SHARP's consumer

reach. This, in combination with the SHARP website, can also be used to increase the level of understanding of what SHARP does and what the star ratings mean.

An issue that was raised by the majority of manufacturers, retailers and distributors was the long interval between a helmet being brought to market, and receiving a SHARP rating. The final recommendation seeks to address this:

- Investigate working with manufacturers to achieve faster testing and increased funding

Some support was found for the concept of manufacturers paying for tests, and a potential model is used in Euro NCAP car testing, whereby manufacturers sponsor the testing body, who in turn undertake to test at least one of their models per year. The product is bought anonymously from retailers, or is randomly selected during early production before the product goes on sale. Such a model may have implications for consumers' perceptions of the independence of SHARP which would need to be considered.

The key findings and associated recommendations are summarised in Figure 16.

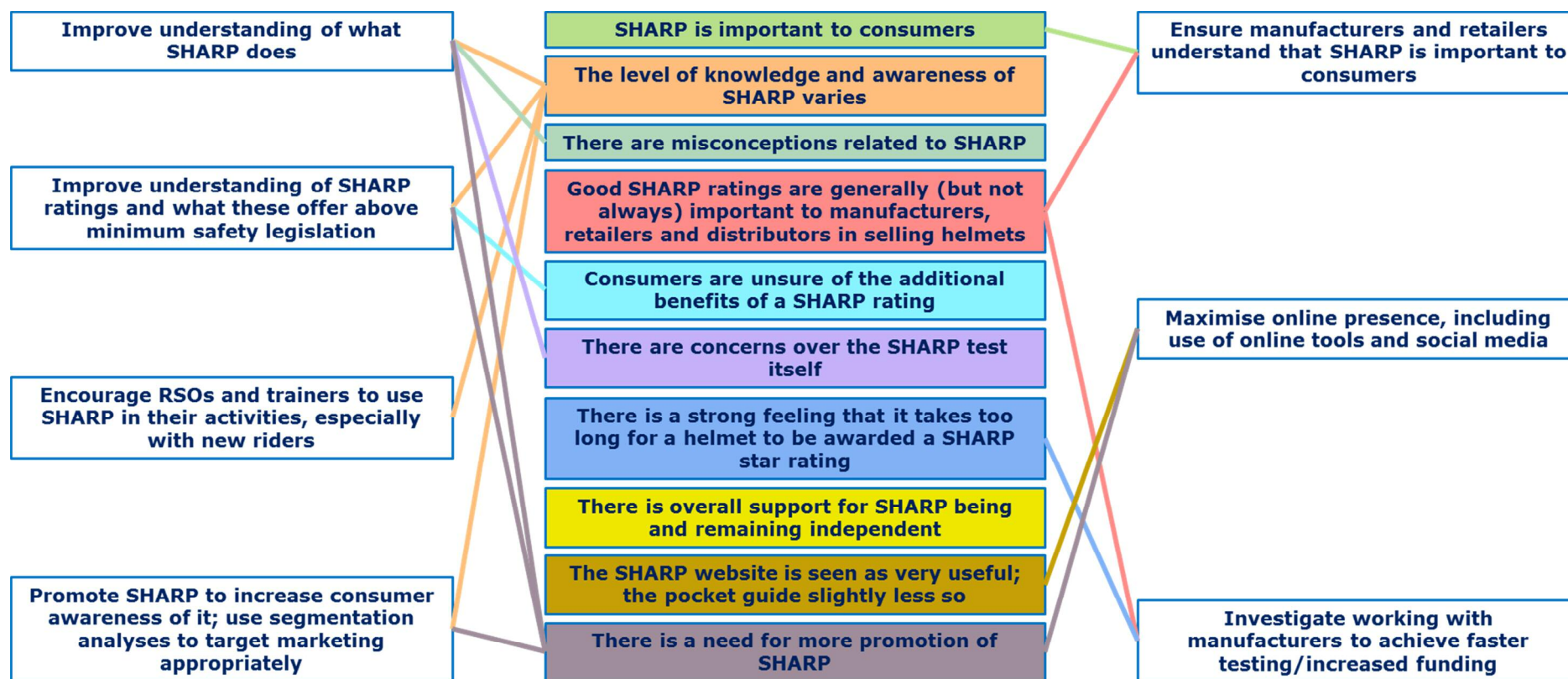


Figure 16. Key findings and recommendations (findings in coloured boxes)

## 5. Limitations

All research methods have their limitations. A multi-method approach was used to gather the findings described in this report, including qualitative techniques which are not likely to represent opinions across the spectrum of organisations involved in manufacturing and retailing motorcycle helmets, or individuals involved in road safety and motorcycle training. Instead the methods used identified specific issues that may require further investigation using more quantitative techniques and larger samples.

Due to the time constraints of this study, several aspects of Task 1 were streamlined. MCN publications were reviewed for alternate weeks only, and a selection of ten online retailers and ten manufacturer websites were reviewed. The reduction of the scope of these various databases may, therefore, have introduced selection bias into the analysis. Although the methods used for reducing the scope of these databases were chosen to mitigate the effects of selection bias, any conclusions derived from Task 1 should take this into consideration.

The representativeness of the consumers who responded to the survey is not known; it may be that the sample is a good reflection of the whole population of motorcyclists in the UK, but this is not guaranteed. Therefore all consumer survey findings should be considered with this in mind.

## 6. Future research

There are various avenues that future research could take to extend and corroborate the current findings, and to explore the effects of SHARP on motorcycle helmet consumers. For example the SHARP website states that "while all helmets have to meet minimum safety standards, research carried out in 2007 showed that up to 50 lives could be saved each year if motorcyclists wore the safest helmets available to them. That's why SHARP is here." To date, no research has been done to investigate whether SHARP's principal aim of reducing fatalities is succeeding. This is a key area of future research that would require careful consideration and development of a robust methodology to establish effectiveness.

Consumer views of SHARP could be explored further through interviews and focus groups, including exploration of how SHARP could be promoted to reach different rider types. Barriers to promotion by manufacturers and retailers could also be explored further through qualitative methods.

## 7. References

Chinn B (ed) (2001). Cost 327: Motorcycle safety helmets – Final Report of the Action. Luxembourg: European Co-operation in the Field of Scientific and Technical Research.

Christmas, S., Young, D., Cookson, R., & Cuerden, R. (2009). Passion, performance, practicality-motorcyclists' motivations and attitudes to safety-motorcycle safety research project. Published Project report (PPR442). Crowthorne: Transport Research Laboratory.

National Readership Survey. (2015). Retrieved March 31, 2015, from <http://www.nrs.co.uk/>

## Appendices

### Appendix 1: In-depth desk study outcome measures and findings

#### Outcome Measures

##### *Task 1a: Influence of SHARP on historical press marketing strategies*

Data was extracted from all adverts and articles identified by the systematic search employed across the MCN issues included for review. Outcome measures were prospectively defined and abstracted from each reference. These outcome measures included details on:

- The reference
  - Issue date
  - Page number
- The motorcycle helmet
  - Helmet make
  - Helmet model
  - Helmet price
- The source type of the reference (selected from the following source types):
  - "Comparison Article", "Competition Article", "Product Release Article", "Opinion Article", "Gossip Article", "Technical Article", "Letter Article", "Quiz Article", "Retailer Advert", "Distributor Advert", "Manufacturer Advert", "Event Advert", "MCN Advert"

Information was further abstracted from each SHARP reference to assess the techniques implemented by MCN articles and adverts that refer to the SHARP rating scheme. This data included:

- Any published SHARP scores
- The incidence of SHARP-specific material
  - Logos, website links and any further explanation of SHARP rating scheme
- The priority given to the SHARP rating scheme by each SHARP reference based on the location of the SHARP reference in the article/advert
  - Assessed as high, medium and low by the reviewer
- The opinion created by each SHARP reference about the SHARP rating scheme
  - Assessed as positive, neutral and negative by the reviewer

Further information was also extracted from all references to record the incidence that other helmet safety features were referenced in MCN. This data included:

- References to:
  - ECE Regulation 22.05
  - Snell M2010
  - ACU Gold
  - Any other legislation
  - Any other helmet safety schemes
  - Any other features in the technical specifications of the helmet

Finally, comparative data was extracted for all helmets from the DfT database of SHARP tests, including:

- SHARP ratings
- SHARP flip front latch scores
- SHARP test dates

### ***Task 1b: Influence of SHARP on current marketing strategies***

Outcome measures were also dependent upon media type. Data was extracted from the MCN adverts and articles identified by the systematic search through the collection of the prospectively defined outcome measures described above. All exhibitors surveyed at the MCN London Motorcycle Show 2015 were asked about the influence of the SHARP rating scheme on their sales and marketing strategies at exhibitions (in particular whether they placed importance on it or if visitors to their stand asked about it) and whether SHARP-specific marketing material was used for exhibitor hand-outs or stand displays (including the SHARP logo, website links or any further explanation of the SHARP rating scheme).

To maintain consistency with the analysis of the MCN issues, outcome measures for the reviews of both the online retailer and manufacturer websites and the UK printed and global online media outlets were similarly defined. These outcome measures included details on:

- The reference
  - Website name
  - Website address
  - Date of access
- The motorcycle helmet
  - Helmet make
  - Helmet model
  - Helmet price
- The source type of the reference (selected from the following source types):
  - "Retailer", "Manufacturer", "Press"

Information was further abstracted from each SHARP reference to assess the techniques implemented by online retailer and manufacturer websites that refer to the SHARP rating scheme. This data included:

- Any published SHARP scores
- The incidence of SHARP-specific material
  - Logos, website links and any further explanation of SHARP rating scheme
- The priority given to the SHARP rating scheme by each SHARP reference based on the location of the SHARP reference in the webpage
  - Assessed as high, medium and low by the reviewer

Further information was also extracted from all references to record the incidence that other helmet safety features were referenced by these sources. This data included:

- References to:
  - ECE Regulation 22.05
  - Snell M2010
  - ACU Gold
  - Any other legislation
  - Any other helmet safety schemes



- Any other features in the technical specifications of the helmet

Finally, comparative data was extracted for all helmets from the DfT database of SHARP tests, including:

- SHARP ratings
- SHARP flip front latch scores
- SHARP test dates

### **Task 1c: Effect of SHARP ratings publication on UK market**

This Task aimed to evaluate the influence of the SHARP rating scheme on the UK market through the analysis of helmet make and model sales data and by comparing the SHARP ratings of current and discontinued helmet models. To analyse whether low scoring SHARP tested helmets are discontinued, all manufacturer websites and two major UK online retailers (Helmetscity and Motocentral) were interrogated for information on the product release status of all helmets tested as part of the SHARP rating scheme. SHARP rating scheme scores were then compared between both the current and discontinued motorcycle helmet models. Finally, to investigate the effect of the SHARP rating scheme on direct sales data, several organisations were contacted to locate publicly available material that could provide this information. These included the European Association of Automotive Suppliers (CLEPA), the Motorcycle Industry Association (MCIA), the Society of Motor Manufacturers & Traders (SMMT), the Retail Motor Industry Federation (RMIF) and Global Industry Analysts Inc. (GIA, Inc.). These databases were also supplemented through direct contact with manufacturers ( $n=4$ ) and distributors ( $n=1$ ). Unfortunately, as all manufacturers and distributors were reluctant to release commercially sensitive data and no organisation collected motorcycle helmet sales data at the model level, no sales data was acquired to support this Task.

## **In-depth findings**

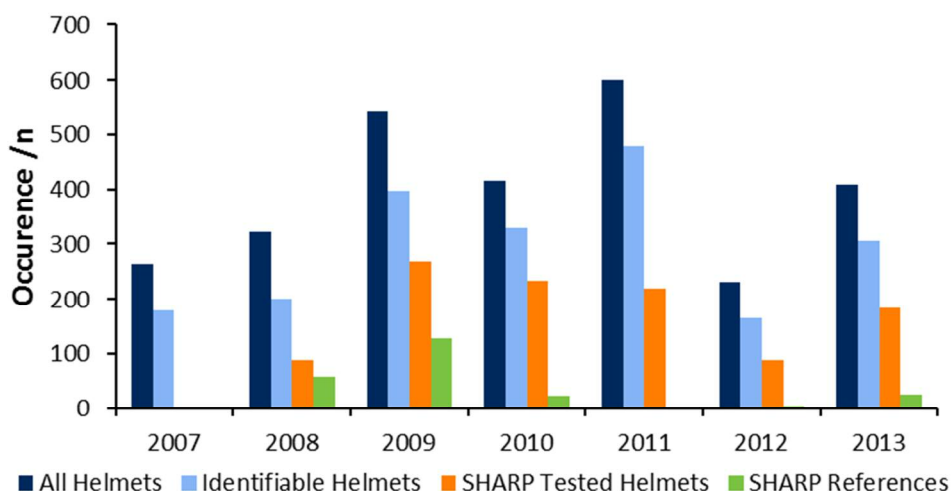
### **Task 1a: Influence of SHARP on historical press marketing strategies**

Task 1a manually and electronically searched a total of 14,880 pages across 183 MCN issues published between 01/01/2007-31/12/2013. During this time period the incidence of references to the SHARP rating scheme within MCN, when compared to all references to helmets, was observed to be 9% (Table 5). This incidence was found to peak at 23% during 2009 (Figure 17), but this reduced to <7% in the following years, with <2% of articles and adverts referring to SHARP during 2011 and 2012 (Table 6).

**Table 5. Incidence of MCN references to the SHARP rating scheme (2007-2013)**

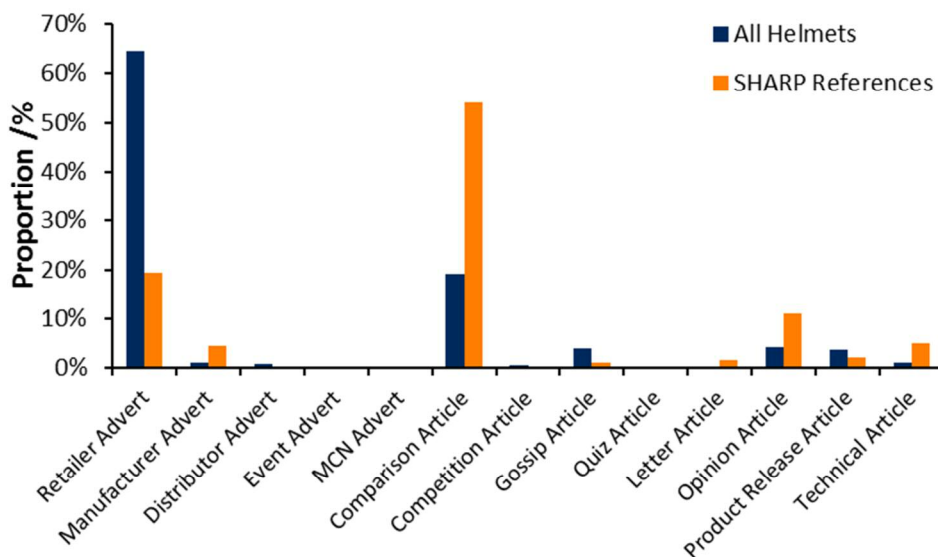
| Source Type | Total No. of Helmets | Total No. of Identifiable Helmets | Total No. of SHARP Rated Helmets | Total No. of SHARP References |
|-------------|----------------------|-----------------------------------|----------------------------------|-------------------------------|
| Advert      | 1856                 | 1243 (67%)                        | 727 (39%)                        | 59 (3%)                       |
| Article     | 927                  | 814 (88%)                         | 354 (38%)                        | 179 (19%)                     |
| Total       | 2783                 | 2057 (74%)                        | 1081 (39%)                       | 238 (9%)                      |

(Incidence presented in parenthesis as a percentage of total number of references to helmets)



**Figure 17. Yearly occurrence of MCN references to the SHARP rating scheme, when compared to MCN references to all helmets, all identifiable helmets and all SHARP rated helmets (2007-2013)**

When evaluating top level source type, a greater proportion of articles were observed to refer to the SHARP rating scheme when compared to references in adverts (19% vs. 3%, Table 5). When evaluating source type in greater detail (Figure 18), it was clear that this difference was caused by retailer adverts referring to helmets more frequently than any other source type (64%), whilst MCN comparison articles referred to the SHARP rating scheme more frequently than any other source type (54%). When analysing source type references by publication year, only the retailer adverts showed any temporal trend with an increase in the proportion of references to helmets over time (Table 7 and Table 8).



**Figure 18. Proportion of MCN source types referring to helmets and the SHARP rating scheme (2007-2013)**

**Table 6. Yearly incidence of MCN references to the SHARP rating scheme, when compared to MCN references to all helmets, all identifiable helmets and all SHARP rated helmets (2007-2013)**

| Year                               | 2007      | 2008      | 2009      | 2010      | 2011      | 2012      | 2013      | All        |
|------------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| <b>No. of Helmets</b>              |           |           |           |           |           |           |           |            |
| Advert                             | 182       | 191       | 340       | 307       | 309       | 185       | 342       | 1856       |
| Article                            | 82        | 131       | 203       | 108       | 291       | 45        | 67        | 927        |
| Total                              | 264       | 322       | 543       | 415       | 600       | 230       | 409       | 2783       |
| <b>No. of Identifiable Helmets</b> |           |           |           |           |           |           |           |            |
| Advert                             | 117 (64%) | 102 (53%) | 222 (65%) | 228 (74%) | 190 (61%) | 128 (69%) | 256 (75%) | 1243 (67%) |
| Article                            | 63 (77%)  | 99 (76%)  | 175 (86%) | 101 (94%) | 289 (99%) | 38 (84%)  | 49 (73%)  | 814 (88%)  |
| Total                              | 180 (68%) | 201 (62%) | 397 (73%) | 329 (79%) | 479 (80%) | 166 (72%) | 305 (75%) | 2057 (74%) |
| <b>No. of SHARP Tested Helmets</b> |           |           |           |           |           |           |           |            |
| Advert                             | 0 (0%)    | 39 (20%)  | 148 (44%) | 165 (54%) | 133 (43%) | 83 (45%)  | 159 (46%) | 727 (39%)  |
| Article                            | 0 (0%)    | 50 (38%)  | 121 (60%) | 67 (62%)  | 87 (30%)  | 5 (11%)   | 24 (36%)  | 354 (38%)  |
| Total                              | 0 (0%)    | 89 (28%)  | 269 (50%) | 232 (56%) | 220 (37%) | 88 (38%)  | 183 (45%) | 1081 (39%) |
| <b>No. of SHARP References</b>     |           |           |           |           |           |           |           |            |
| Advert                             | 0 (0%)    | 9 (5%)    | 43 (13%)  | 0 (0%)    | 1 (0%)    | 3 (2%)    | 3 (1%)    | 59 (3%)    |
| Article                            | 2 (2%)    | 49 (37%)  | 84 (41%)  | 22 (20%)  | 0 (0%)    | 0 (0%)    | 22 (33%)  | 179 (19%)  |
| Total                              | 2 (1%)    | 58 (18%)  | 127 (23%) | 22 (5%)   | 1 (0%)    | 3 (1%)    | 25 (6%)   | 238 (9%)   |

(Incidence presented in parentheses as a percentage of total number of references to helmets)

**Table 7. Yearly proportion of all MCN references to all helmets stratified by source type (2007-2013)**

| Year                    | 2007       | 2008       | 2009       | 2010       | 2011       | 2012       | 2013       | All         |
|-------------------------|------------|------------|------------|------------|------------|------------|------------|-------------|
| Retailer Advert         | 174 (66%)  | 165 (51%)  | 319 (59%)  | 307 (74%)  | 307 (51%)  | 184 (80%)  | 337 (82%)  | 1793 (64%)  |
| Manufacturer Advert     | 0 (0%)     | 8 (2%)     | 19 (3%)    | 0 (0%)     | 2 (0%)     | 0 (0%)     | 0 (0%)     | 29 (1%)     |
| Distributor Advert      | 6 (2%)     | 15 (5%)    | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 21 (1%)     |
| Event Advert            | 2 (1%)     | 1 (0%)     | 2 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 3 (1%)     | 8 (0%)      |
| MCN Advert              | 0 (0%)     | 2 (1%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 1 (0%)     | 2 (0%)     | 5 (0%)      |
| Comparison Article      | 38 (14%)   | 56 (17%)   | 143 (26%)  | 1 (0%)     | 264 (44%)  | 0 (0%)     | 34 (8%)    | 536 (19%)   |
| Competition Article     | 5 (2%)     | 2 (1%)     | 3 (1%)     | 4 (1%)     | 1 (0%)     | 0 (0%)     | 0 (0%)     | 15 (1%)     |
| Gossip Article          | 31 (12%)   | 30 (9%)    | 30 (6%)    | 2 (0%)     | 0 (0%)     | 4 (2%)     | 14 (3%)    | 111 (4%)    |
| Quiz Article            | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)     | 0 (0%)      |
| Letter Article          | 1 (0%)     | 4 (1%)     | 3 (1%)     | 1 (0%)     | 0 (0%)     | 2 (1%)     | 0 (0%)     | 11 (0%)     |
| Opinion Article         | 1 (0%)     | 2 (1%)     | 2 (0%)     | 62 (15%)   | 12 (2%)    | 29 (13%)   | 11 (3%)    | 119 (4%)    |
| Product Release Article | 3 (1%)     | 30 (9%)    | 8 (1%)     | 37 (9%)    | 13 (2%)    | 9 (4%)     | 5 (1%)     | 105 (4%)    |
| Technical Article       | 3 (1%)     | 7 (2%)     | 14 (3%)    | 1 (0%)     | 1 (0%)     | 1 (0%)     | 3 (1%)     | 30 (1%)     |
| <b>Total</b>            | <b>264</b> | <b>322</b> | <b>543</b> | <b>415</b> | <b>600</b> | <b>230</b> | <b>409</b> | <b>2783</b> |

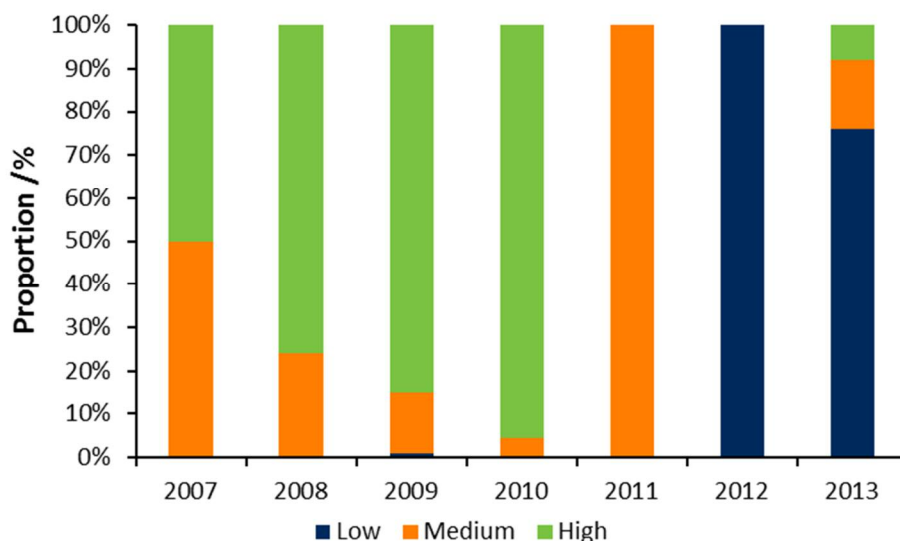
(Proportion presented in parentheses as a percentage of total number of references to helmets)

**Table 8. Yearly proportion of all MCN references to the SHARP rating scheme only stratified by source type (2007-2013)**

| Year                    | 2007     | 2008      | 2009       | 2010      | 2011     | 2012     | 2013      | All        |
|-------------------------|----------|-----------|------------|-----------|----------|----------|-----------|------------|
| Retailer Advert         | 0 (0%)   | 8 (14%)   | 31 (24%)   | 0 (0%)    | 1 (100%) | 3 (100%) | 3 (12%)   | 46 (19%)   |
| Manufacturer Advert     | 0 (0%)   | 0 (0%)    | 11 (9%)    | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 11 (5%)    |
| Distributor Advert      | 0 (0%)   | 0 (0%)    | 0 (0%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 0 (0%)     |
| Event Advert            | 0 (0%)   | 0 (0%)    | 1 (1%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 1 (0%)     |
| MCN Advert              | 0 (0%)   | 1 (2%)    | 0 (0%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 1 (0%)     |
| Comparison Article      | 0 (0%)   | 38 (66%)  | 76 (60%)   | 0 (0%)    | 0 (0%)   | 0 (0%)   | 15 (60%)  | 129 (54%)  |
| Competition Article     | 0 (0%)   | 0 (0%)    | 0 (0%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 0 (0%)     |
| Gossip Article          | 1 (50%)  | 2 (3%)    | 0 (0%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 3 (1%)     |
| Quiz Article            | 0 (0%)   | 0 (0%)    | 0 (0%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 0 (0%)     |
| Letter Article          | 0 (0%)   | 3 (5%)    | 1 (1%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)    | 4 (2%)     |
| Opinion Article         | 0 (0%)   | 0 (0%)    | 1 (1%)     | 21 (95%)  | 0 (0%)   | 0 (0%)   | 4 (16%)   | 26 (11%)   |
| Product Release Article | 0 (0%)   | 0 (0%)    | 3 (2%)     | 0 (0%)    | 0 (0%)   | 0 (0%)   | 2 (8%)    | 5 (2%)     |
| Technical Article       | 1 (50%)  | 6 (10%)   | 3 (2%)     | 1 (5%)    | 0 (0%)   | 0 (0%)   | 1 (4%)    | 12 (5%)    |
| <b>Total</b>            | <b>2</b> | <b>58</b> | <b>127</b> | <b>22</b> | <b>1</b> | <b>3</b> | <b>25</b> | <b>238</b> |

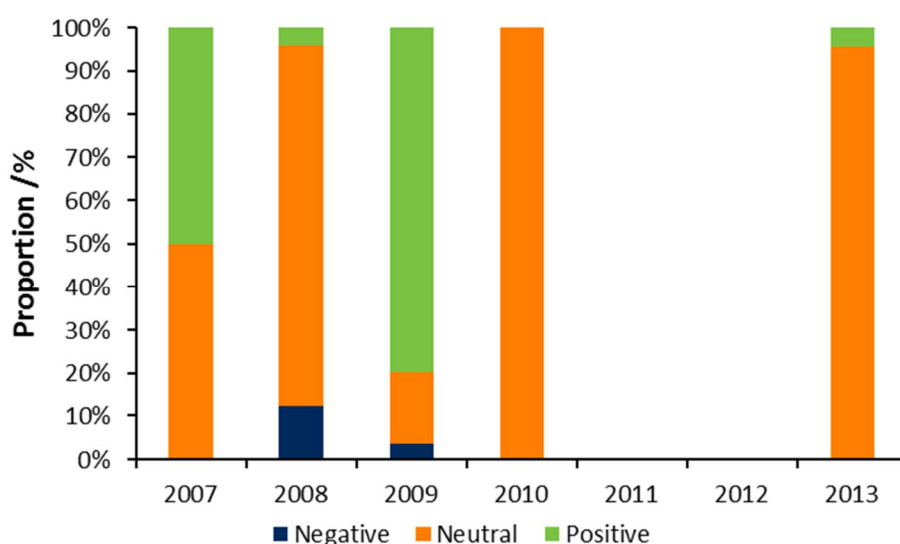
(Proportion presented in parentheses as a percentage of total number of references to the SHARP rating scheme)





**Figure 19. Priority given to MCN references to the SHARP rating scheme (2007-2013)**

When evaluating the techniques implemented by articles and adverts that refer to the SHARP rating scheme, presentation of a SHARP rating (79%) and the SHARP logo (57%) were the most frequent techniques used (Table 9). The inclusion of the SHARP website address and any further explanation of the SHARP rating scheme were rarely implemented (4% and 8%, respectively). When assessing the temporal changes in the priority given to the SHARP rating scheme reference (Figure 19), a clear reduction in the priority given to SHARP by MCN was found from 2010 onwards. Finally, when analysing the general opinion created by MCN articles about the SHARP rating scheme (Figure 20), a peak in negative opinion articles was found in 2008 and 2009, which was followed up by the publication of only one positive opinion article from 2010 onwards.



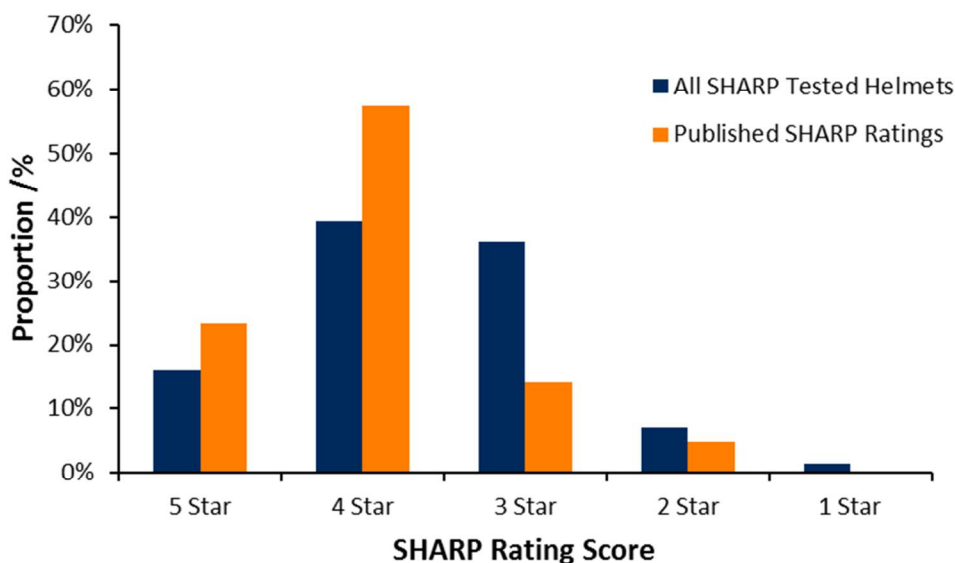
**Figure 20. Opinion created by MCN articles referring to the SHARP rating scheme (2007-2013)**

**Table 9. Yearly proportion of techniques implemented by all MCN references to the SHARP rating scheme (2007-2013)**

| Year                        | 2007    | 2008     | 2009      | 2010      | 2011     | 2012     | 2013     | All       |
|-----------------------------|---------|----------|-----------|-----------|----------|----------|----------|-----------|
| SHARP References            | 2       | 58       | 127       | 22        | 1        | 3        | 25       | 238       |
| SHARP Rating Score          | 0 (0%)  | 46 (79%) | 102 (80%) | 21 (95%)  | 1 (100%) | 3 (100%) | 14 (56%) | 187 (79%) |
| SHARP Logo Included         | 0 (0%)  | 8 (14%)  | 106 (83%) | 21 (95%)  | 0 (0%)   | 0 (0%)   | 0 (0%)   | 135 (57%) |
| SHARP Website Included      | 1 (50%) | 0 (0%)   | 7 (6%)    | 0 (0%)    | 0 (0%)   | 0 (0%)   | 1 (4%)   | 9 (4%)    |
| Explanation of SHARP Scheme | 1 (50%) | 3 (5%)   | 13 (10%)  | 0 (0%)    | 0 (0%)   | 0 (0%)   | 3 (12%)  | 20 (8%)   |
| Priority given to SHARP     |         |          |           |           |          |          |          |           |
| High                        | 1 (50%) | 44 (76%) | 108 (85%) | 21 (95%)  | 0 (0%)   | 0 (0%)   | 2 (8%)   | 176 (74%) |
| Medium                      | 1 (50%) | 14 (24%) | 18 (14%)  | 1 (5%)    | 1 (100%) | 0 (0%)   | 4 (16%)  | 39 (16%)  |
| Low                         | 0 (0%)  | 0 (0%)   | 1 (1%)    | 0 (0%)    | 0 (0%)   | 3 (100%) | 19 (76%) | 23 (10%)  |
| Opinion created of SHARP    |         |          |           |           |          |          |          |           |
| Positive                    | 1 (50%) | 2 (4%)   | 67 (80%)  | 0 (0%)    | 0 (0%)   | 0 (0%)   | 1 (5%)   | 71 (40%)  |
| Neutral                     | 1 (50%) | 41 (84%) | 14 (17%)  | 22 (100%) | 0 (0%)   | 0 (0%)   | 21 (95%) | 99 (55%)  |
| Negative                    | 0 (0%)  | 6 (12%)  | 3 (4%)    | 0 (0%)    | 0 (0%)   | 0 (0%)   | 0 (0%)   | 9 (5%)    |

(Proportion presented in parentheses as either the percentage of total number of references to the SHARP rating scheme or, to establish the general opinion created on SHARP, the percentage of articles that refer to the SHARP rating scheme)





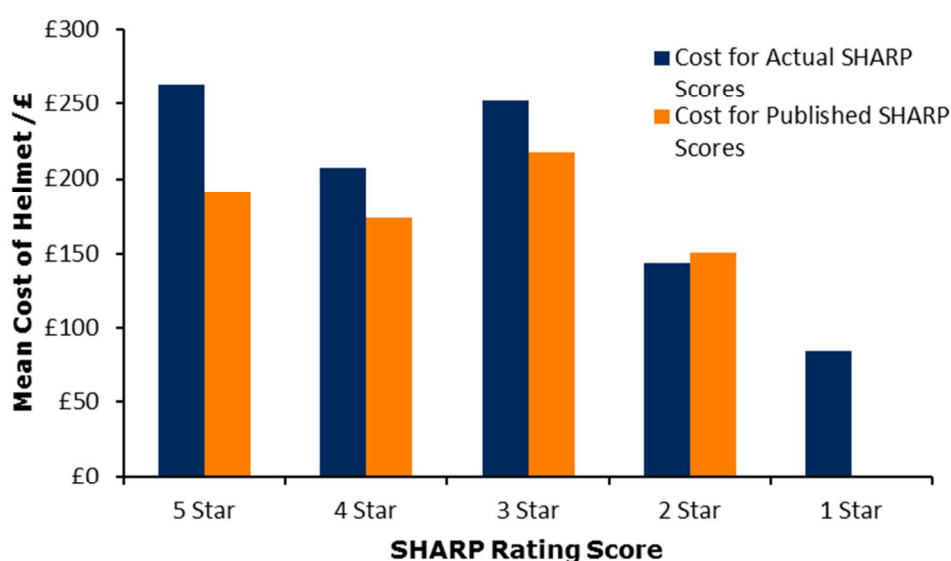
**Figure 21. Comparison of proportions of actual and MCN published SHARP rating scores (2007-2013)**

To analyse the strategies used for publishing SHARP ratings, the proportion of actual and published star ratings were compared for each star rating finding that SHARP scores were more likely to be published in MCN for higher (4 and 5 star) SHARP scored helmets (Figure 21). This was further demonstrated through the observation that SHARP scores of 1 star were not found to be published alongside helmets in MCN. When considering temporal trends in strategies used for the publication of SHARP ratings in MCN it was clear that this association has remained consistent since 2008 (Table 10). Finally, as no flip front latch scores were found to be published in MCN, this comparison could not be made.

**Table 10. Yearly proportions of both actual and MCN published SHARP rating and flip front latch scores (2007-2013)**

| Year                           | 2007   | 2008     | 2009      | 2010      | 2011      | 2012     | 2013      | All       |
|--------------------------------|--------|----------|-----------|-----------|-----------|----------|-----------|-----------|
| No. of Helmets                 | 264    | 322      | 543       | 415       | 600       | 230      | 409       | 2783      |
| No. of SHARP Tested Helmets    | 0 (0%) | 89 (28%) | 269 (50%) | 232 (56%) | 220 (37%) | 88 (38%) | 183 (45%) | 992 (36%) |
| 5 Star                         | 0 (0%) | 14 (16%) | 50 (19%)  | 50 (22%)  | 32 (15%)  | 4 (5%)   | 23 (13%)  | 159 (16%) |
| 4 Star                         | 0 (0%) | 37 (42%) | 105 (39%) | 68 (29%)  | 98 (45%)  | 39 (44%) | 81 (44%)  | 391 (39%) |
| 3 Star                         | 0 (0%) | 28 (31%) | 84 (31%)  | 83 (36%)  | 75 (34%)  | 45 (51%) | 71 (39%)  | 358 (36%) |
| 2 Star                         | 0 (0%) | 9 (10%)  | 28 (10%)  | 22 (9%)   | 12 (5%)   | 0 (0%)   | 8 (4%)    | 70 (7%)   |
| 1 Star                         | 0 (0%) | 1 (1%)   | 2 (1%)    | 9 (4%)    | 3 (1%)    | 0 (0%)   | 0 (0%)    | 14 (1%)   |
| No. of Latch Tested Helmets    | 0 (0%) | 0 (0%)   | 30 (6%)   | 32 (8%)   | 21 (4%)   | 7 (3%)   | 16 (4%)   | 106 (4%)  |
| No. of Published SHARP Ratings | 0 (0%) | 46 (14%) | 102 (19%) | 21 (5%)   | 1 (0%)    | 3 (1%)   | 14 (3%)   | 141 (5%)  |
| 5 Star                         | 0 (0%) | 13 (28%) | 27 (26%)  | 3 (14%)   | 0 (0%)    | 0 (0%)   | 3 (21%)   | 33 (23%)  |
| 4 Star                         | 0 (0%) | 19 (41%) | 58 (57%)  | 11 (52%)  | 1 (100%)  | 3 (100%) | 8 (57%)   | 81 (57%)  |
| 3 Star                         | 0 (0%) | 8 (17%)  | 12 (12%)  | 6 (29%)   | 0 (0%)    | 0 (0%)   | 2 (14%)   | 20 (14%)  |
| 2 Star                         | 0 (0%) | 6 (13%)  | 5 (5%)    | 1 (5%)    | 0 (0%)    | 0 (0%)   | 1 (7%)    | 7 (5%)    |
| 1 Star                         | 0 (0%) | 0 (0%)   | 0 (0%)    | 0 (0%)    | 0 (0%)    | 0 (0%)   | 0 (0%)    | 0 (0%)    |
| No. Published before Test Date | 0 (0%) | 0 (0%)   | 0 (0%)    | 0 (0%)    | 0 (0%)    | 0 (0%)   | 0 (0%)    | 0 (0%)    |

(Proportion presented in parentheses as a percentage of total number of SHARP rated helmets and as a percentage of the total number of references to a published SHARP rating score)

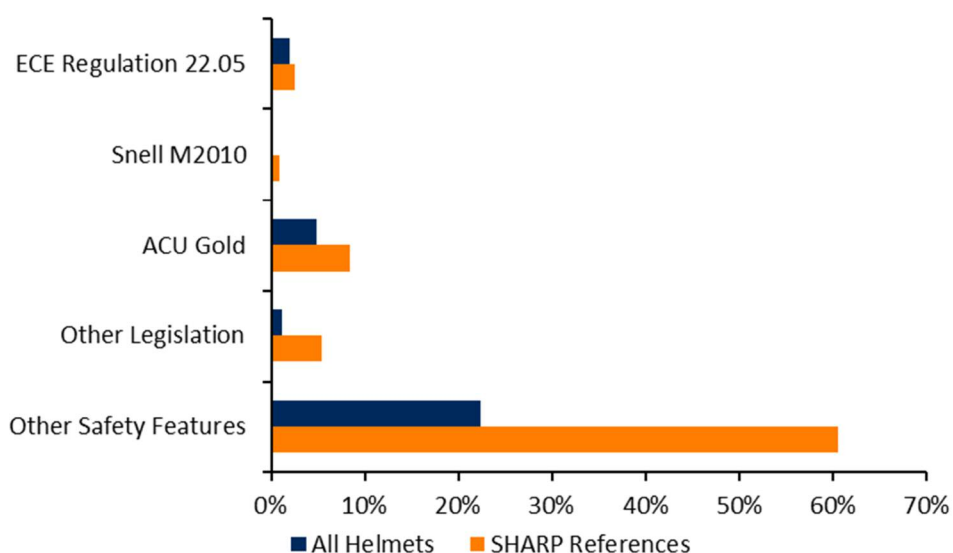


**Figure 22. Comparison of costs between actual and MCN published SHARP rating scores (2007-2013)**

When evaluating the helmet costing strategies used alongside published SHARP ratings, this research observed that the decision to publish SHARP ratings alongside helmets was associated with lower cost helmets with a rating of 3 stars and above and higher cost helmets with a 2 star rating (Figure 22). The temporal trends associated with this relationship were observed to remain consistent between 2008 and 2012 (Table 11). During 2013, however, the decision to publish a SHARP rating alongside a helmet was related to greater helmet costs, regardless of SHARP rating (Table 11).

**Table 11. Mean costs of helmets stratified by actual and MCN published SHARP star rating and publication year (2007-2013)**

| Year                          | 2007    | 2008    | 2009    | 2010    | 2011    | 2012    | 2013    | All     |
|-------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|
| <b>Actual SHARP Rating</b>    |         |         |         |         |         |         |         |         |
| 5                             | -       | £160.56 | £218.96 | £274.70 | £316.89 | £539.99 | £323.34 | £263.54 |
| 4                             | -       | £183.91 | £212.60 | £206.17 | £170.20 | £292.26 | £221.16 | £207.02 |
| 3                             | -       | £286.95 | £217.63 | £249.79 | £240.14 | £245.92 | £298.91 | £251.67 |
| 2                             | -       | £93.10  | £182.36 | £176.56 | £94.09  | -       | £77.49  | £143.76 |
| 1                             | -       | £74.99  | £79.99  | £85.55  | £90.00  | -       | -       | £84.63  |
| Unrated                       | £312.57 | £477.34 | £203.13 | £184.57 | £153.45 | £411.16 | £268.75 | £237.63 |
| <b>Published SHARP Rating</b> |         |         |         |         |         |         |         |         |
| 5                             | -       | £162.15 | £168.20 | £280.00 | -       | -       | £406.33 | £191.32 |
| 4                             | -       | £139.31 | £171.24 | £155.00 | £39.99  | £104.99 | £340.62 | £173.87 |
| 3                             | -       | £187.23 | £191.24 | £235.50 | -       | -       | £439.99 | £217.35 |
| 2                             | -       | £118.33 | £213.99 | £100.00 | -       | -       | £79.99  | £150.76 |
| 1                             | -       | -       | -       | -       | -       | -       | -       | -       |
| Unrated                       | -       | £255.97 | £233.19 | £225.98 | £212.06 | £284.37 | £251.89 | £234.86 |



**Figure 23. Proportion of helmet and SHARP rating scheme references associated with other helmet safety features (2007-2013)**

Finally, the proportion of other helmet safety features that were referred to alongside the SHARP rating scheme was observed to be greater than the proportion referred to when associated with all included MCN adverts and articles (Figure 23). This was consistent regardless of safety feature, implying that the application of the SHARP rating scheme was associated with an increased focus on the safety of helmets. With the reduction in the number of SHARP rating scheme references since 2009, however, temporal trends proved difficult to extract (Table 12).

**Table 12. Yearly proportion of all MCN references to helmets and the SHARP rating scheme that were associated with other helmet safety features (2007-2013)**

| Year                  | 2007     | 2008      | 2009      | 2010    | 2011      | 2012   | 2013     | Total     |
|-----------------------|----------|-----------|-----------|---------|-----------|--------|----------|-----------|
| All Helmets           | 264      | 322       | 543       | 415     | 600       | 230    | 409      | 2783      |
| ECE Regulation 22.05  | 20 (8%)  | 13 (4%)   | 3 (1%)    | 0 (0%)  | 7 (1%)    | 8 (3%) | 4 (1%)   | 55 (2%)   |
| Snell M2010           | 0 (0%)   | 2 (1%)    | 0 (0%)    | 0 (0%)  | 0 (0%)    | 0 (0%) | 0 (0%)   | 2 (0%)    |
| ACU Gold              | 34 (13%) | 20 (6%)   | 26 (5%)   | 2 (0%)  | 38 (6%)   | 5 (2%) | 11 (3%)  | 136 (5%)  |
| Other Legislation     | 7 (3%)   | 10 (3%)   | 6 (1%)    | 0 (0%)  | 0 (0%)    | 0 (0%) | 8 (2%)   | 31 (1%)   |
| Other Safety Features | 76 (29%) | 104 (32%) | 161 (30%) | 10 (2%) | 235 (39%) | 6 (3%) | 30 (7%)  | 622 (22%) |
| SHARP References      | 2        | 58        | 127       | 22      | 1         | 3      | 25       | 238       |
| ECE Regulation 22.05  | 1 (50%)  | 5 (9%)    | 0 (0%)    | 0 (0%)  | 0 (0%)    | 0 (0%) | 0 (0%)   | 6 (3%)    |
| Snell M2010           | 0 (0%)   | 2 (3%)    | 0 (0%)    | 0 (0%)  | 0 (0%)    | 0 (0%) | 0 (0%)   | 2 (1%)    |
| ACU Gold              | 0 (0%)   | 9 (16%)   | 9 (7%)    | 2 (9%)  | 0 (0%)    | 0 (0%) | 0 (0%)   | 20 (8%)   |
| Other Legislation     | 0 (0%)   | 2 (3%)    | 3 (2%)    | 0 (0%)  | 0 (0%)    | 0 (0%) | 8 (32%)  | 13 (5%)   |
| Other Safety Features | 0 (0%)   | 38 (66%)  | 82 (65%)  | 7 (32%) | 0 (0%)    | 0 (0%) | 17 (68%) | 144 (61%) |

(Proportion presented in parentheses as a percentage of total number of helmets and as a percentage of the total number of references to the SHARP rating scheme)

### Task 1b: Influence of SHARP on current marketing strategies

The findings from Task 1b can be subdivided into four sections based on the media type reviewed, including MCN 2014 publications, online retailer and manufacturer websites, the MCN London Motorcycle Show 2015 exhibition and UK printed press and global web outlets.

#### MCN 2014 publications

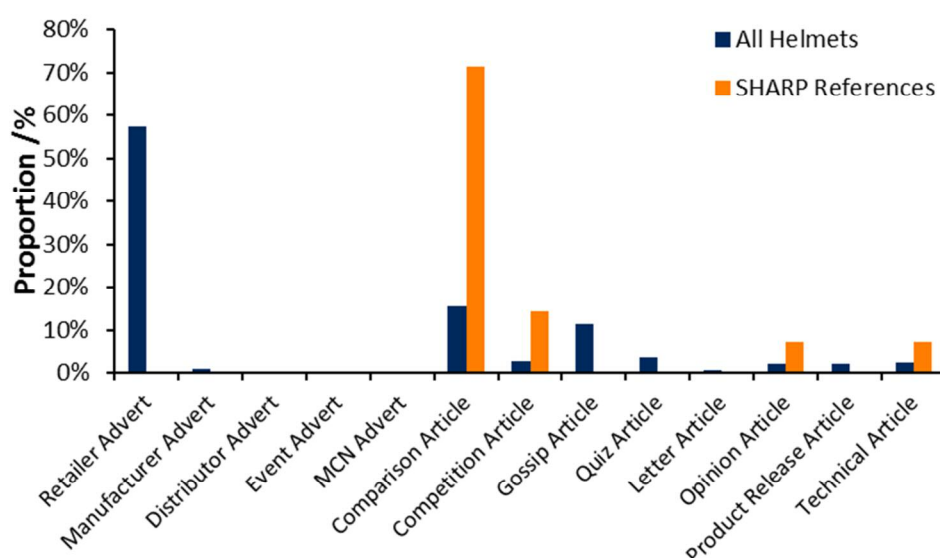
This task manually and electronically searched a total of 2,978 pages across 27 MCN issues published between 01/01/2014-31/12/2014. During this time period the incidence of references to the SHARP rating scheme within MCN, when compared to all references to helmets, was observed to be 4% (Table 13).

**Table 13. Incidence of MCN references to the SHARP rating scheme (2014)**

| Source Type | Total No. of Helmets | Total No. of Identifiable Helmets | Total No. of SHARP Rated Helmets | Total No. of SHARP References |
|-------------|----------------------|-----------------------------------|----------------------------------|-------------------------------|
| Advert      | 191                  | 111 (58%)                         | 75 (39%)                         | 0 (0%)                        |
| Article     | 133                  | 116 (87%)                         | 60 (45%)                         | 14 (11%)                      |
| Total       | 324                  | 227 (70%)                         | 135 (42%)                        | 14 (4%)                       |

(Incidence presented in parenthesis as a percentage of total number of references to helmets)

When evaluating top level source type, 11% of articles were observed to refer to the SHARP rating scheme in comparison to 0% of adverts (Table 13). When evaluating source types in greater detail (Figure 24), this research found that, although the majority of references to helmets were from retailer adverts (57%), no retailer sought to refer to the SHARP rating scheme. MCN comparison articles, however, were observed to be the primary source types (71%) referring to the SHARP rating scheme (Table 14).



**Figure 24. Proportion of MCN source types referring to helmets and the SHARP rating scheme (2014)**

**Table 14. Proportion of all MCN references to all helmets and the SHARP rating scheme stratified by source type (2014)**

|                         | Helmets   | SHARP references |
|-------------------------|-----------|------------------|
| Retailer Advert         | 186 (57%) | 0 (0%)           |
| Manufacturer Advert     | 3 (1%)    | 0 (0%)           |
| Distributor Advert      | 1 (0%)    | 0 (0%)           |
| Event Advert            | 1 (0%)    | 0 (0%)           |
| MCN Advert              | 0 (0%)    | 0 (0%)           |
| Comparison Article      | 51 (16%)  | 10 (71%)         |
| Competition Article     | 9 (3%)    | 2 (14%)          |
| Gossip Article          | 37 (11%)  | 0 (0%)           |
| Quiz Article            | 12 (4%)   | 0 (0%)           |
| Letter Article          | 2 (1%)    | 0 (0%)           |
| Opinion Article         | 7 (2%)    | 1 (7%)           |
| Product Release Article | 7 (2%)    | 0 (0%)           |
| Technical Article       | 8 (2%)    | 1 (7%)           |
| Total                   | 324       | 14               |

(Proportion presented in parentheses as a percentage of total number of helmets and as a percentage of the total number of references to the SHARP rating scheme)

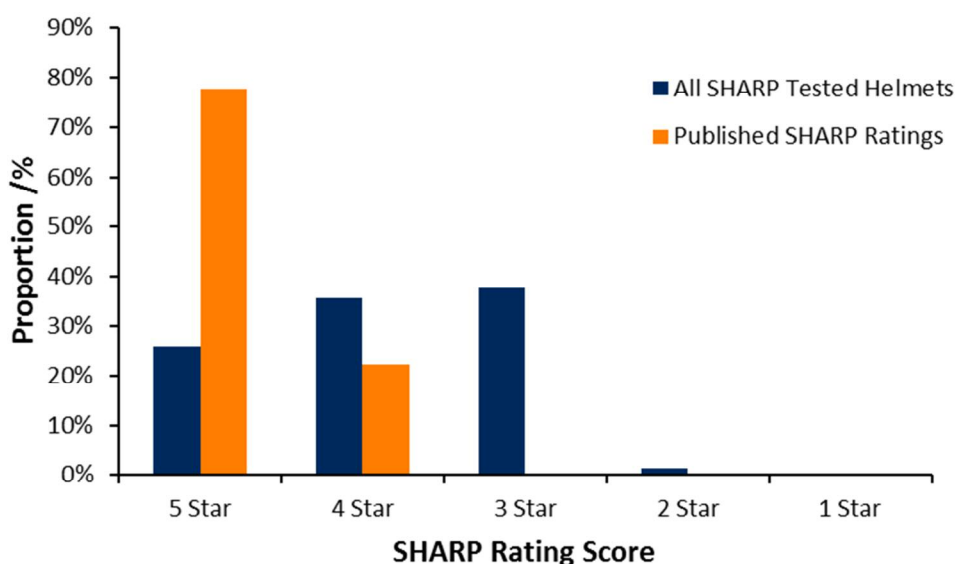
When evaluating the techniques implemented by articles and adverts referring to the SHARP rating scheme, presentation of a SHARP rating (64%) was the most regular technique used (Table 15). The inclusion of the SHARP logo or website address and any further explanation of the SHARP rating scheme were rarely implemented (0%, 14% and 14%, respectively). When assessing the priority associated with SHARP rating scheme references, 50% of all references were considered to have a high priority status. Finally, when analysing the general opinion created by MCN articles about the SHARP rating scheme, 36% of all MCN articles were considered to provide a positive opinion towards the SHARP rating scheme, whilst 0% of articles were associated with the creation of any negative opinion.



**Table 15. Proportion of techniques implemented by all MCN references to the SHARP rating scheme (2014)**

|                             |         |
|-----------------------------|---------|
| SHARP References            | 14      |
| SHARP Rating                | 9 (64%) |
| SHARP Logo Included         | 0 (0%)  |
| SHARP Website Included      | 2 (14%) |
| Explanation of SHARP Scheme | 2 (14%) |
| Priority given to SHARP:    |         |
| High                        | 7 (50%) |
| Medium                      | 3 (21%) |
| Low                         | 4 (29%) |
| Opinion created of SHARP:   |         |
| Positive                    | 5 (36%) |
| Neutral                     | 9 (64%) |
| Negative                    | 0 (0%)  |

(Proportion presented in parentheses as a percentage of total number of references to the SHARP rating scheme)



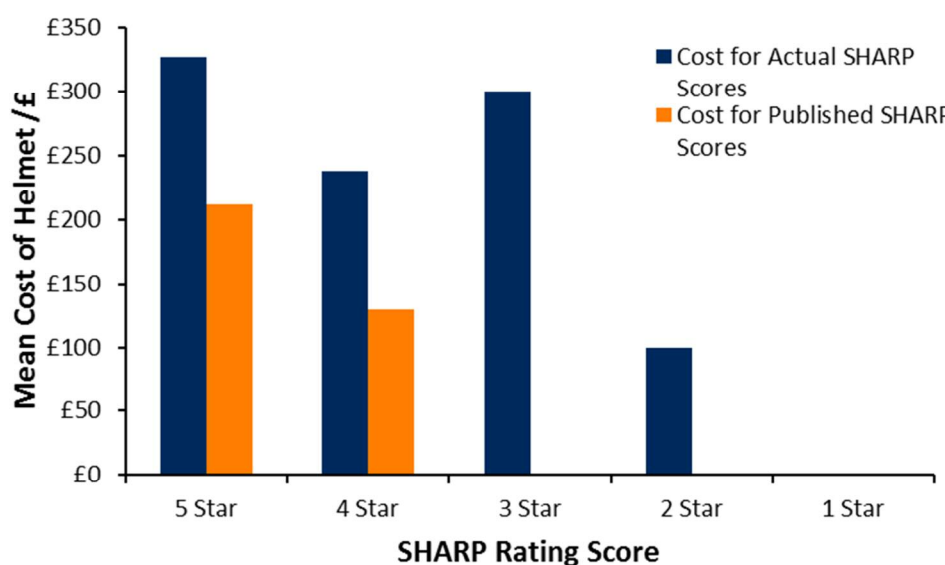
**Figure 25. Comparison of proportions of actual and MCN published SHARP rating scores (2014)**

To analyse the strategies used for publishing SHARP ratings, the proportion of actual and published star ratings were compared for each star rating finding that SHARP scores were more likely to be published in MCN for 5 star SHARP scored helmets (Figure 25). This was further demonstrated through the observation that SHARP scores of 1, 2 and 3 stars were not found to be published alongside helmets in MCN (Table 16). As no flip front latch scores were found to be published in MCN, no comparison could be made.

**Table 16. Proportions of both actual and MCN published SHARP rating and flip front latch scores (2014)**

|                                |           |
|--------------------------------|-----------|
| No. of Helmets                 | 324       |
| No. of SHARP Rated Helmets     | 135 (42%) |
| 5 Star                         | 35 (26%)  |
| 4 Star                         | 48 (36%)  |
| 3 Star                         | 51 (38%)  |
| 2 Star                         | 2 (1%)    |
| 1 Star                         | 0 (0%)    |
| No. of Latch Tested Helmets    | 15 (5%)   |
| No. of Published SHARP Ratings | 9 (3%)    |
| 5 Star                         | 7 (78%)   |
| 4 Star                         | 2 (22%)   |
| 3 Star                         | 0 (0%)    |
| 2 Star                         | 0 (0%)    |
| 1 Star                         | 0 (0%)    |
| No. Published before Test Date | 0 (0%)    |

(Proportion presented in parentheses either as a percentage of total number of SHARP rated helmets or as a percentage of the total number of references to a published SHARP rating)

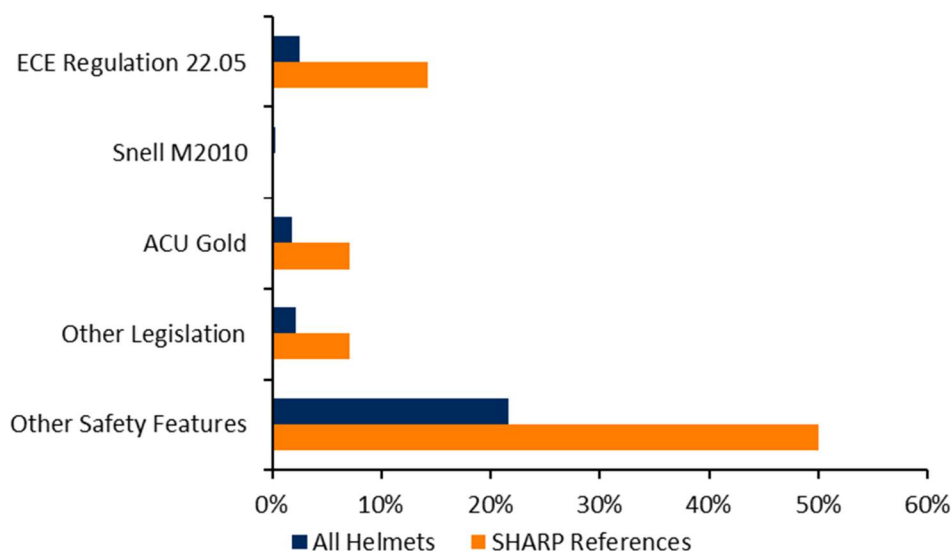


**Figure 26. Comparison of costs between actual and MCN published SHARP rating scores (2014)**

When evaluating the helmet costing strategies used alongside published SHARP ratings, this research observed that the decision to publish SHARP ratings alongside helmets was associated with lower cost helmets for both 4 and 5 star rated helmets (Figure 26). Unfortunately, as only 4 and 5 star SHARP ratings were published in MCN during 2014 (Table 17), no further analyses could be performed.

**Table 17. Mean costs of helmets stratified by actual and MCN published SHARP star rating (2014)**

| Actual SHARP Rating    |         |
|------------------------|---------|
| 5                      | £326.62 |
| 4                      | £237.78 |
| 3                      | £299.80 |
| 2                      | £99.99  |
| 1                      | -       |
| Unrated                | £771.88 |
| Published SHARP Rating |         |
| 5                      | £211.42 |
| 4                      | £129.99 |
| 3                      | -       |
| 2                      | -       |
| 1                      | -       |
| Unrated                | £291.19 |



**Figure 27. Proportion of helmet and SHARP rating scheme references associated with other helmet safety features (2014)**

Finally, the proportion of other helmet safety features that were referred to alongside the SHARP rating scheme was observed to be greater than the proportion referred to when associated with all included MCN adverts and articles (Figure 26). This was consistent for all safety features apart from Snell M2010 (Table 18), implying that references to the SHARP rating scheme were associated with an increased focus on the safety of helmets.

**Table 18. Proportion of all MCN references to helmets and the SHARP rating scheme that were associated with other helmet safety features (2014)**

|                       |          |
|-----------------------|----------|
| All Helmets           | 324      |
| ECE Regulation 22.05  | 8 (2%)   |
| Snell M2010           | 1 (0%)   |
| ACU Gold              | 6 (2%)   |
| Other Legislation     | 7 (2%)   |
| Other Safety Features | 70 (22%) |
| SHARP References      | 14       |
| ECE Regulation 22.05  | 2 (14%)  |
| Snell M2010           | 0 (0%)   |
| ACU Gold              | 1 (7%)   |
| Other Legislation     | 1 (7%)   |
| Other Safety Features | 7 (50%)  |

(Proportion presented in parentheses as a percentage of total number of helmets and as a percentage of the total number of references to the SHARP rating scheme)

#### *Online retailer and manufacturer websites*

This task manually and electronically searched a total of 1,080 helmets across 10 online retailer and 10 manufacturer websites. The incidence of references to the SHARP rating scheme across these websites for all helmets was observed to be 10% (Table 19), whilst the proportion of these websites that had safety and SHARP dedicated areas was found to be 20% and 30%, respectively. When evaluating source type, online retailers referred to the SHARP rating scheme across 10% of their helmets, whilst manufacturer websites similarly referred to the SHARP rating scheme across 9% of helmets (Table 19). Finally, when compared to online retailers, manufacturer websites were found to have a greater proportion of webpages dedicated to both helmet safety and the SHARP rating scheme (Table 15).

**Table 19. Incidence of online retailer and manufacturer website references to the SHARP rating scheme and proportion of websites with SHARP or safety dedicated webpages**

| Website Type | Total No. of Identifiable Helmets | Total No. of SHARP Rated Helmets | Total No. of SHARP References | SHARP Dedicated Areas | Safety Dedicated Areas |
|--------------|-----------------------------------|----------------------------------|-------------------------------|-----------------------|------------------------|
| Retailer     | 923                               | 361 (39%)                        | 95 (10%)                      | 1 (10%)               | 1 (10%)                |
| Manufacturer | 157                               | 37 (24%)                         | 14 (9%)                       | 3 (30%)               | 5 (50%)                |
| Total        | 1080                              | 398 (37%)                        | 109 (10%)                     | 4 (20%)               | 6 (30%)                |

(Incidence presented in parenthesis as a percentage of total number of references to helmets)

(Proportion of SHARP or safety dedicated webpages presented in parenthesis as a percentage of total number of websites)

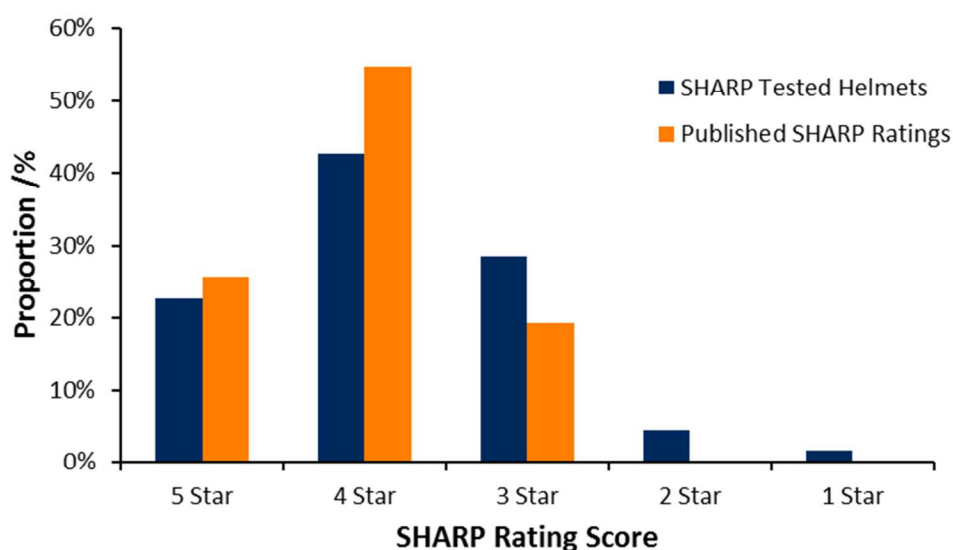
When evaluating the techniques implemented by both online retailers and manufacturer websites that refer to the SHARP rating scheme, presentation of a SHARP rating was the most regular technique used for both online retailers (98%) and manufacturers (100%) (Table 20). The inclusion of the SHARP logo or website address and any further explanation of the SHARP rating scheme were rarely implemented (0%, 14% and 14%,

respectively). When assessing the priority associated with SHARP rating scheme references, 50% of all references were considered to have a high priority status. Finally, when analysing the general opinion created by MCN articles about the SHARP rating scheme, 36% of all MCN articles were considered to provide a positive opinion towards the SHARP rating scheme, whilst 0% of articles were associated with the creation of any negative opinion.

**Table 20. Proportion of techniques implemented by all online retailer and manufacturer website references to the SHARP rating scheme**

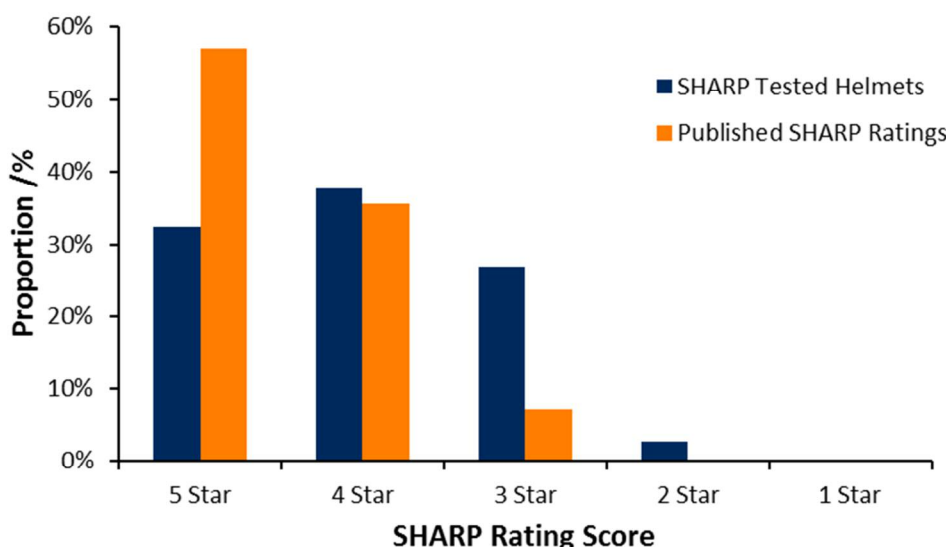
| Website Type                | Retailer | Manufacturer |
|-----------------------------|----------|--------------|
| SHARP References            | 95       | 14           |
| SHARP Rating                | 93 (98%) | 14 (100%)    |
| SHARP Logo Included         | 21 (22%) | 14 (100%)    |
| SHARP Website Included      | 4 (4%)   | 10 (71%)     |
| Explanation of SHARP Scheme | 31 (33%) | 4 (29%)      |
| Priority given to SHARP:    |          |              |
| High                        | 14 (15%) | 7 (50%)      |
| Medium                      | 66 (69%) | 3 (21%)      |
| Low                         | 15 (16%) | 4 (29%)      |

(Proportion presented in parentheses as a percentage of total number of references to the SHARP rating scheme)



**Figure 28. Comparison of proportions of actual and online retailer published SHARP rating scores**

To analyse the strategies used for publishing SHARP ratings, the proportion of actual and published star ratings were compared for each star rating. This found that SHARP scores were more likely to be published by online retailers for 4 and 5 star SHARP rated helmets (Figure 28) and manufacturers for 5 star SHARP rated helmets (Figure 29). This was further demonstrated through the observation that 1 and 2 star SHARP ratings were not found to be published alongside helmets by either online retailers or manufacturers (Table 17). As no flip front latch scores were found to be published by any online retailer or manufacturer, no comparison could be made.



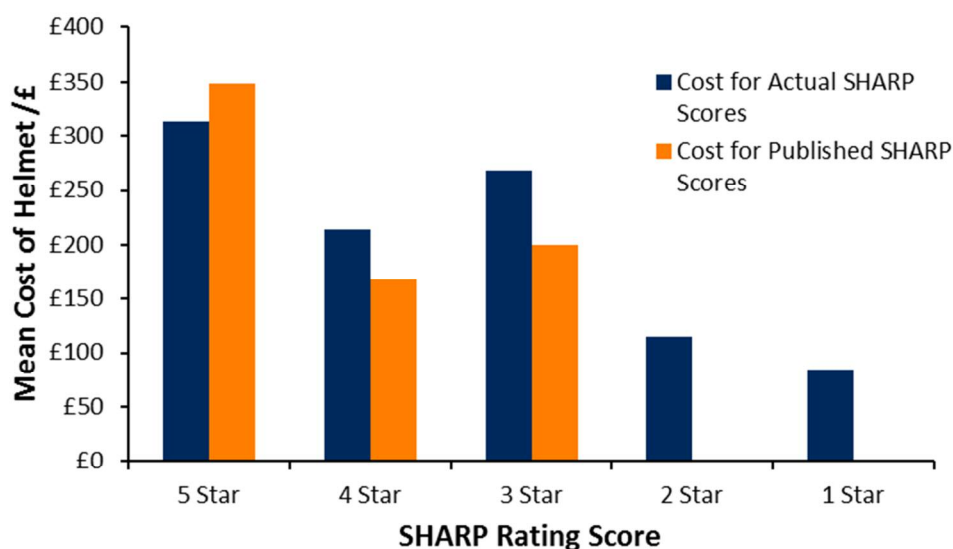
**Figure 29. Comparison of proportions of actual and manufacturer website published SHARP rating scores**

**Table 21. Proportions of both actual and online retailer and manufacturer website published SHARP rating and flip front latch scores (2014)**

| Website Type                   | Retailer  | Manufacturer |
|--------------------------------|-----------|--------------|
| No. of Helmets                 | 923       | 157          |
| No. of SHARP Tested Helmets    | 361 (39%) | 37 (24%)     |
| 5 Star                         | 82 (23%)  | 12 (32%)     |
| 4 Star                         | 154 (43%) | 14 (38%)     |
| 3 Star                         | 103 (29%) | 10 (27%)     |
| 2 Star                         | 16 (4%)   | 1 (3%)       |
| 1 Star                         | 6 (2%)    | 0 (0%)       |
| No. of Latch Tested Helmets    | 77 (8%)   | 9 (6%)       |
| No. of Published SHARP Ratings | 93 (10%)  | 14 (9%)      |
| 5 Star                         | 24 (26%)  | 8 (57%)      |
| 4 Star                         | 51 (55%)  | 5 (36%)      |
| 3 Star                         | 18 (19%)  | 1 (7%)       |
| 2 Star                         | 0 (0%)    | 0 (0%)       |
| 1 Star                         | 0 (0%)    | 0 (0%)       |

(Proportion presented in parentheses either as a percentage of total number of SHARP rated helmets or as a percentage of the total number of references to a published SHARP rating)

When evaluating the helmet costing strategies used alongside published SHARP ratings, this research observed that the decision by online retailers to publish SHARP ratings alongside helmets was associated with lower cost helmets for both 3 and 4 star rated helmets (Figure 30). Unfortunately, as costs were provided by manufacturer websites for one 4 star rated helmet only (Table 13), no meaningful analysis could be performed to assess the current helmet costing strategies employed by manufacturer websites.



**Figure 30. Comparison of costs between actual and online retailer published SHARP rating scores**

**Table 22. Mean costs of online retailer and manufacturer website helmets stratified by actual and MCN published SHARP star rating**

| Website Type                   | Retailer | Manufacturer |
|--------------------------------|----------|--------------|
| <i>Actual SHARP Rating:</i>    |          |              |
| 5                              | £312.72  | £199.90      |
| 4                              | £213.81  | £362.81      |
| 3                              | £268.59  | £319.62      |
| 2                              | £114.78  | £139.90      |
| 1                              | £83.75   | -            |
| Unrated                        | £177.75  | -            |
| <i>Published SHARP Rating:</i> |          |              |
| 5                              | £348.76  | -            |
| 4                              | £168.00  | £439.99      |
| 3                              | £200.08  | -            |
| 2                              | -        | -            |
| 1                              | -        | -            |
| Unrated                        | £225.05  | £307.26      |

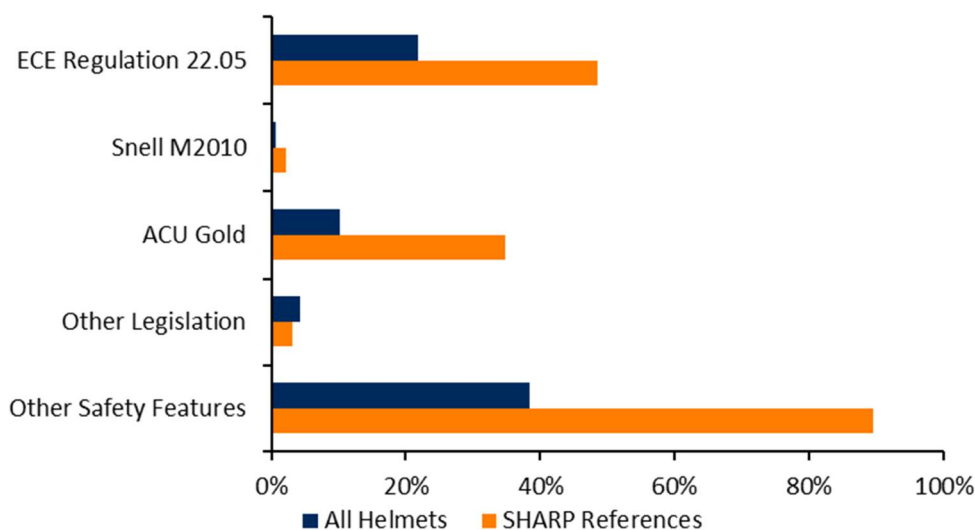
Finally, the proportion of other helmet safety features that were referred to alongside the SHARP rating scheme was observed to be greater than the proportion referred to for all helmets on online retailer (Figure 31) and manufacturer (Figure 32) websites. This was consistent for all safety features apart from other legislation associated with helmets (Table 23), implying that references to the SHARP rating scheme were associated with an increased focus on the safety of helmets.



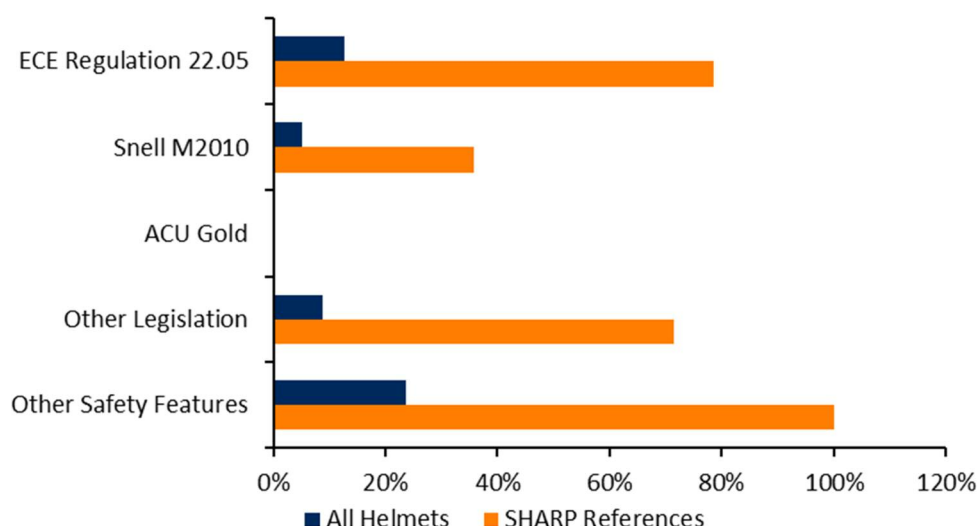
**Table 23. Proportion of all online retailer and manufacturer website references to helmets and the SHARP rating scheme that were associated with other helmet safety features**

| Website Type          | Retailer  | Manufacturer |
|-----------------------|-----------|--------------|
| All Helmets           | 923       | 157          |
| ECE Regulation 22.05  | 202 (22%) | 20 (13%)     |
| Snell M2010           | 7 (1%)    | 8 (5%)       |
| ACU Gold              | 94 (10%)  | 0 (0%)       |
| Other Legislation     | 39 (4%)   | 14 (9%)      |
| Other Safety Features | 355 (38%) | 37 (24%)     |
| SHARP References      | 95        | 14           |
| ECE Regulation 22.05  | 46 (48%)  | 11 (79%)     |
| Snell M2010           | 2 (2%)    | 5 (36%)      |
| ACU Gold              | 33 (35%)  | 0 (0%)       |
| Other Legislation     | 3 (3%)    | 10 (71%)     |
| Other Safety Features | 85 (89%)  | 14 (100%)    |

(Proportion presented in parentheses as a percentage of total number of helmets and as a percentage of the total number of references to the SHARP rating scheme)



**Figure 31. Proportion of helmet and SHARP rating scheme references from online retailer website associated with other helmet safety features**



**Figure 32. Proportion of helmet and SHARP rating scheme references from manufacturer website associated with other helmet safety features**

#### *MCN London Motorcycle Show 2015 exhibition*

This task performed a short survey of 22 exhibitor stands at the MCN London Motorcycle Show 2015. These exhibitors comprised of 2 (9%) manufacturers, 5 (23%) motorcyclist groups and 15 (68%) retailers. The proportion of exhibitors which stated that visitors to the exhibition attempt to discuss helmet safety with them was found to be 9%, whilst only 4.5% of exhibitors stated that visitors attempt to discuss the SHARP rating scheme with them. All exhibitors stated that they did not directly approach visitors to discuss either helmet safety or the SHARP rating scheme. When exhibitors were asked if they would comment on the influence that SHARP had had on their marketing strategies, the following two trends in responses were observed:

Concerns over the SHARP test itself:

*"I know that manufacturers strengthen their helmets in certain areas to pass the test." (Exhibition Retailer)*

*"I won't use SHARP. [Manufacturers] only show it if it's 4 stars. I don't believe you can get any 3 stars...I think manufacturers modify helmets to pass." (Exhibition Retailer)*

*"I have issues with SHARP. You can't pay for helmets to be tested and I am worried about [helmets] getting low scores... [as manufacturers] wouldn't advertise them if they were low." (Exhibition Retailer)*

Lack of desire to use SHARP for exhibition marketing strategy:

*"[SHARP is] not a USP for the company." (Exhibition Retailer)*

*"I know about SHARP testing, but don't push to try and use it to sell products." (Exhibition Retailer)*

*"I have a list of [SHARP] scores for all my stock, however, I did not advertise it." (Exhibition Retailer)*

*"In the real world... [customers] prefer [to buy their helmet] more on looks and style. SHARP is not a strong element." (Exhibition Retailer)*

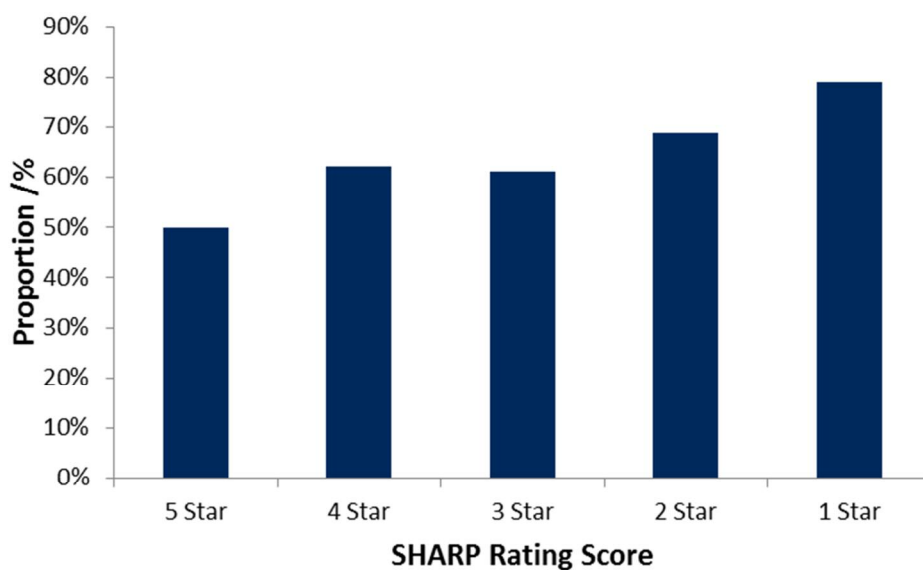
No exhibitor hand-outs referred to either the SHARP rating scheme, any compliance with ECE Regulation 22.05, Snell M2010 or ACU Gold or any other helmet safety features. Six (27%) exhibitor stand displays, however, were observed to refer to the SHARP rating scheme, with all six exhibitors referring to SHARP ratings through the placement of manufacturer stickers on the helmet packaging only and five (83%) of these exhibitors including the SHARP logo on these stickers. No exhibitor stand display was observed to either refer to the SHARP website or provide any further explanation of the SHARP rating scheme. Seven (32%) exhibitors referred to other motorcycle helmet safety features, including three exhibitors (14%) referring to ECE Regulation 22.05, four (18%) referring to Snell M2010, one (4.5%) referring to ACU Gold and five (23%) referring to other helmet safety features and legislation.

#### *UK printed press and global web outlets*

This task electronically searched the output of ~8 million UK printed press and global web outlets between 10/01/2014-09/04/2014. During this time period only two references to the SHARP rating scheme were made across these web outlets. The first reference was in an article published in the online printed version of Business Quarter (BQ) magazine, a leading business publication that reaches entrepreneurs and senior business executives across Scotland, The North East, Yorkshire and the West Midlands. This article provided general safety tips for motorcyclists, citing the benefits of selecting the safest motorcycle helmet they can by using the SHARP rating scheme website. The second reference was in a product advertisement for the Viper V131 released on the website for the video-based platform, Dailymotion.com. The advertisement referenced the SHARP rating and flip front latch score of the helmet only, whilst also referring to the compliance of the helmet with ECE Regulation 22.05. A further two articles were found to reference the SHARP rating scheme during this period, but these were excluded from analysis as neither article was published in the UK.

#### ***Task 1c: Effect of SHARP ratings publication on UK market***

Using the information gathered in Task 1b, this Task manually searched a total of 1,080 helmets across 10 online retailer and 10 manufacturer websites to determine the product release status of all helmet models rated by the SHARP rating scheme. This observed that a greater proportion of helmet models have been discontinued when associated with lower SHARP ratings (Figure 33), with only 50% of 5 star helmet models having been discontinued since 2008, in comparison to 79% of helmet models with a SHARP rating of 1 (Table 24). Unfortunately, as this study was unable to obtain historical sales data at the helmet model level, it is unknown if this correlation is actually due to the SHARP rating attained by the helmet or due to other drivers in the market.



**Figure 33. Proportion of discontinued helmet models by actual SHARP rating scores**

**Table 24. Proportion of continued and discontinued helmet models by actual SHARP ratings**

| Sales Status | 5 Star   | 4 Star   | 3 Star   | 2 Star   | 1 Star   |
|--------------|----------|----------|----------|----------|----------|
| Current      | 25 (50%) | 56 (38%) | 40 (39%) | 10 (31%) | 4 (21%)  |
| Discontinued | 25 (50%) | 92 (62%) | 63 (61%) | 22 (69%) | 15 (79%) |
| Total        | 50       | 148      | 103      | 32       | 19       |

(Proportion presented in parentheses as a percentage of total number of SHARP rated helmet models)

## Appendix 2: CATI survey responses

The tables showing the CATI responses are accompanied, where applicable, by a brief description of some corresponding in-depth interview quotes.

### *How long have you worked for the company?*

|                   | Less than 1 year | More than 1 and less than 5 years | More than 5 and less than 10 years | More than 10 years |
|-------------------|------------------|-----------------------------------|------------------------------------|--------------------|
| Retailer (n=36)   | 19%              | 14%                               | 31%                                | 36%                |
| Distributor (n=4) |                  | 25%                               | 25%                                | 50%                |

### *How long has your company been involved in retailing/distribution of motorcycle helmets?*

|                   | More than 1 and less than 5 years | More than 5 and less than 10 years | More than 10 years | Not sure |
|-------------------|-----------------------------------|------------------------------------|--------------------|----------|
| Retailer (n=36)   | 8%                                | 8%                                 | 78%                | 6%       |
| Distributor (n=4) | 25%                               | -                                  | 75%                | -        |

### *What are the top selling brands of motorcycle helmet that your company retails/distributes (name up to 5)?*

Respondents were asked to state the top selling brands of helmet retailed or distributed by their company. Respondents could name up to five brands (most only mentioned one or two). The table shows the number of times each brand was mentioned.

|                              | Retailer (n=36) | Distributor (n=4) |
|------------------------------|-----------------|-------------------|
| SHOEI                        | 10              | 2                 |
| SHARK                        | 11              | -                 |
| HJC                          | 8               | -                 |
| AGV                          | 4               | 3                 |
| ARAI                         | 5               | 1                 |
| LS2                          | 5               | -                 |
| SCHUBERTH                    | 2               | 2                 |
| VCAN                         | 4               | -                 |
| NITRO, VIPER, DUCHINNI, BELL | 3               | -                 |
| CABERG                       | 2               | 1                 |
| SPADA, LAZER                 | 1               | 1                 |
| BULTACO, SCORPION            | -               | 2                 |

|   | Retailer (n=36) | Distributor (n=4) |
|---|-----------------|-------------------|
| BOX, DUCATI, GREX, HARLEY, ICON, MDS, MT, VCAN, X LITE, NOLAN | 1               | -                 |

***How important is the following information from manufacturers or distributors when deciding which helmets to retail in the UK?***

CATI respondents were asked to rate the importance of various pieces of information from manufacturers or distributors when deciding which helmets to retail or distribute in the UK. The table below shows the mean score (from 1, not at all important, to 10, very important).

|   | Retailer (n=36) |     | Distributor (n=4) |     |
|---|-----------------|-----|-------------------|-----|
|   | Mean            | SD  | Mean              | SD  |
| Comfort   | 9.1             | 1.1 | 9.8               | 0.5 |
| Safety ratings (e.g. safety ratings schemes like SHARP) | 8.5             | 2.1 | 4.3               | 3.3 |
| Helmet type   | 8.1             | 1.9 | 9.0               | 1.2 |
| Features  | 8.0             | 1.9 | 8.0               | 1.4 |
| Price   | 7.9             | 2.2 | 7.5               | 1.7 |
| Noise   | 7.9             | 1.7 | 8.0               | 0.0 |
| Safety standards (e.g. British Standard Kite mark)      | 7.8             | 3.3 | 9.3               | 1.0 |
| Helmet style  | 7.8             | 2.0 | 8.8               | 1.5 |
| Brand   | 7.1             | 2.2 | 9.3               | 1.0 |
| Aerodynamics  | 7.1             | 2.2 | 7.0               | 2.2 |
| Helmet name   | 6.0             | 2.6 | 8.0               | 2.8 |

(1=not at all important, 10=very important, ranked by mean score across all respondents)

*"It's style, price, that sort of thing."* (Distributor)

*[Do you look into safety?] "No, as long as they are legal, so have ECE22.05 marking on, they're legal, I'm happy to stock them."* (Retailer)

*"The first thing is to make sure we have a range of the different types, and it's then to make sure that they look good, they perform well, obviously to make sure that they're the right standards."* (Retailer)

*"[Safety is] the key thing, because obviously we have a duty to our dealers and end users, but secondly it's also a useful sales aid."* (Distributor)

### What marketing media do you look at when selecting helmets to sell/distribute?

|                        | Retailer (n=36) | Distributor (n=4) |
|------------------------|-----------------|-------------------|
| Point of sale displays | 22%             | 75%               |
| Social media           | 11%             | 75%               |
| Show stands            | 8%              | 75%               |
| Online advertising     | 11%             | 50%               |
| Newspapers/magazines   | 6%              | 75%               |
| Sports endorsement     | 6%              | 50%               |
| TV                     | 6%              | 25%               |
| Packaging              | 6%              | 25%               |

(% responding 'yes', ranked by percentage across all respondents)

The distributors who took part in the in-depth interviews tended to have a relationship with one or two brands of helmet, and so did not actively seek new helmets:

*"We have two brands, that will probably be enough for us. I suppose something exceptional could come up, you could possibly look at it, but it's not something we'd be actively looking."* (Distributor)

Manufacturers were asked what marketing media they use to encourage distributors to stock their helmets. A wide range of tools was mentioned including social media and motorcycle exhibitions:

*"Website of course, Facebook, Twitter, Instagram...we are investing more and more on banners on the motorcycle sites, so we're more well known. We invest with customer on their own websites. We do some magazines also, but more and more we are decreasing the investment from that...exhibitions, stands, we do a lot of events."* (Manufacturer)

Visiting distributors in person was also a key method of encouraging distributors to consider their helmets:

*"A lot in person, we spend a lot of time out with our dealers, and by email as well, we try to send a bi-monthly newsletter out, highlighting new products."* (Distributor)

### How important is the following information for encouraging consumers to purchase helmets in the UK?

|   | Retailer (n=36) |     |
|---|-----------------|-----|
|   | Mean            | SD  |
| Comfort   | 8.9             | 1.3 |
| Price   | 8.3             | 2.1 |
| Safety ratings (e.g. safety ratings schemes like SHARP) | 8.2             | 2.2 |



|  | Retailer (n=36) |     |
|--|-----------------|-----|
| Noise  | 8.1             | 1.5 |
| Helmet type  | 7.8             | 2.1 |
| Helmet style                                       | 7.8             | 1.8 |
| Safety standards (e.g. British Standard Kite mark) | 7.7             | 3.1 |
| Features   | 7.4             | 1.9 |
| Brand  | 7.2             | 2.1 |
| Aerodynamics                                       | 6.7             | 2.1 |
| Helmet name  | 6.6             | 2.3 |

(1=not at all important, 10=very important, ranked by mean scores across all respondents)

(Retailers only – only one distributor also sold to customers, they gave all items a '10' except for safety ratings which was given 5)

In-depth respondents indicated a range of factors are highlighted to encourage customers to buy helmets. Price and style were frequently mentioned, with some respondents indicating that consumers are increasingly expecting low prices, with price sometimes taking precedence over safety:

*"They seem obsessed at the moment with price, and they seem obsessed with the fact that everything should be available for half the price of what it should be."* (Distributor)

*"For some people, all that matters is safety, that's their key concern, and they'll spend whatever they think gives them a perceived level of safety; other people are more concerned with the price or the look of the helmet."* (Distributor)

There was concern that consumers can purchase a helmet without doing enough research, and may mistakenly think they are buying a higher quality product than they are:

*"As far as safety goes, yes, you're buying a helmet, it's safety equipment, European brands are going to stand above Asian brands, but the problem is that a lot of these are diluted, you'll get Asian brands putting Union Jacks on the back of the helmets, and things like this, it confuses people...if they do a bit of research on the product ...they can tell the difference between a cheaper product and a dear product."* (Distributor)

Safety was mentioned by a number of respondents as a key factor in encouraging consumers to purchase their helmets:

*"The first thing that we advertise, even though it's a standard anyway, is that it is at the very least ECE approved and then EC and DOT approved."* (Retailer)

Other important factors included innovative manufacturing, comfort and sports endorsement.

**What marketing media do you use to encourage consumers to purchase your helmets in the UK?**

|                        | Retailer (n=36) | Distributor (n=4) |
|------------------------|-----------------|-------------------|
| Online advertising     | 56%             | 50%               |
| Social media           | 42%             | 75%               |
| Point of sale displays | 31%             | 75%               |
| Newspapers/magazines   | 14%             | 75%               |
| Show stands            | 14%             | 75%               |
| Sports endorsement     | 6%              | 50%               |
| Packaging              | 6%              | 25%               |
| TV                     | 3%              | 25%               |
| Website                | -               | -                 |

(% responding 'yes', ranked by percentage across all respondents)

**What safety standards or ratings schemes do you market when retailing your helmets?**

|                              | Retailer (n=36) | Distributor (n=4) |
|------------------------------|-----------------|-------------------|
| UN 'E' Mark (ECER22-05)      | 78%             | 75%               |
| ACU Gold Sticker             | 69%             | -                 |
| SHARP                        | 53%             | 25%               |
| British Standard (Kite mark) | 44%             | 50%               |
| US DOT                       | 3%              | -                 |
| American standard - Snell    | 3%              | -                 |

(% responding 'yes', ranked by percentage across all respondents)

*"Snell is not a mandatory standard for the US, but they demand very high-impact energy for impact management tests, so we respect the Snell for impact. Also, we know that EC standards require HIC, that is only one standard in the world that requires HIC, so that is also the point that we have to respect...British standard BS6658, although this is no longer a mandatory standard, even for the English market, their requirement for a retention strength system is quite tough, so we pick up what is good from each standard, and also we design our top-range models to be compliant with these kinds of requirements."* (Manufacturer)

*"We believe ECE22.05 is just like a minimum requirement for helmet manufacturers to sell the product in Europe, therefore we have to be aware of the additional performance designed into the helmet."* (Manufacturer)

*"It has to by law reach EC2205, but also, the brand we do particularly well with, because they're a worldwide brand, they also are sent for testing from the various other bodies like DOT, and so on. So we currently use DOT as well."* (Distributor)

"We have some internal tests, internal protocols." (Manufacturer)

### **Rate the popularity of the following helmet styles in the UK at the moment**

The popularity of various helmet styles was explored by asking CATI respondents to rate a number of helmet styles from 1 (not at all popular) to 10 (extremely popular).

|                    | Retailer (n=36) |     | Distributor (n=4) |     |
|--------------------|-----------------|-----|-------------------|-----|
|                    | Mean            | SD  | Mean              | SD  |
| Touring            | 7.5             | 1.8 | 8.3               | 1.0 |
| Sport              | 7.5             | 2.0 | 6.8               | 2.4 |
| Modular/flip front | 7.1             | 2.2 | 8.3               | 0.5 |
| Open face          | 5.0             | 2.6 | 5.3               | 1.3 |
| Scooter            | 4.8             | 2.5 | 5.8               | 2.5 |
| Dirt/motocross     | 4.3             | 2.3 | 4.5               | 3.0 |

(1=not at all popular, 10=very popular, ranked by mean scores across all respondents)

The in-depth interview respondents were also asked to rank helmet types by popularity using the same scale and provided similar responses to the CATI respondents, with touring, modular/flip front and sport helmets being deemed the most popular, and open face, scooter and dirt/motocross helmets receiving the lowest scores.

### **Of the helmets you retail in the UK, approximately what percentage have been SHARP tested?**

All CATI respondents reported that they were aware of the SHARP scheme (one retailer said they were not aware, but when provided with a description stated that they were aware of the scheme). Respondents were asked what percentage of helmets that they retail/distribute in the UK have been SHARP tested.

|          | Retailer (n=36) | Distributor (n=4) |
|----------|-----------------|-------------------|
| None     | 6%              | -                 |
| 40%      | 3%              | -                 |
| 50%      | 8%              | -                 |
| 60%      | -               | 50%               |
| 70%      | 6%              | -                 |
| 80%      | 14%             | 25%               |
| 90%      | 17%             | -                 |
| All      | 28%             | -                 |
| Not sure | 19%             | 25%               |

**What is the lowest and highest SHARP rating for any of the helmets that you retail?**

|            | Retailer (n=36)     |                      | Distributor (n=4)   |                      |
|------------|---------------------|----------------------|---------------------|----------------------|
|            | Lowest SHARP rating | Highest SHARP rating | Lowest SHARP rating | Highest SHARP rating |
| 1 star     | 3%                  | -                    | -                   | -                    |
| 3 stars    | 41%                 | -                    | 50%                 | -                    |
| 4 stars    | 18%                 | 18%                  | -                   | -                    |
| 5 stars    | -                   | 56%                  | -                   | 75%                  |
| Don't know | 38%                 | 26%                  | 50%                 | 25%                  |

**Where would you market the SHARP test rating for a 5 star, 3 star and 1 star helmet?**

|                            | Retailer (n=36) |         |        | Distributor (n=4) |         |        |
|----------------------------|-----------------|---------|--------|-------------------|---------|--------|
|                            | 5 stars         | 3 stars | 1 star | 5 stars           | 3 stars | 1 star |
| On the helmet              | 50%             | 36%     | 8%     | 25%               | 25%     | 25%    |
| On packaging               | 17%             | 14%     | 11%    | 25%               | 25%     | 25%    |
| Point of sale displays     | 14%             | 6%      | -      | 25%               | 25%     | 25%    |
| Online adverts             | 8%              | 6%      | -      | 25%               | 25%     | 25%    |
| Your website               | 6%              | 6%      | -      | 25%               | 25%     | 25%    |
| Show stands                | 3%              | 3%      | -      | 25%               | 25%     | 25%    |
| Newspaper/magazine adverts | 3%              | 3%      | -      | 25%               | 25%     | 25%    |
| Social media               | 3%              | 3%      | -      | 25%               | 25%     | 25%    |
| TV adverts                 | 3%              | 3%      | -      | -                 | -       | -      |
| Other                      | -               | -       | -      | 25%               | 25%     | 25%    |
| Would not advertise        | 31%             | 44%     | 81%    | 25%               | 50%     | 50%    |

(% responding 'yes', ranked by percentage across all respondents for marketing a 5 star helmet)

**Do you think the SHARP star rating gives the consumer enough information?**

|            | Retailer (n=36) | Distributor (n=4) |
|------------|-----------------|-------------------|
| Yes        | 67%             | 50%               |
| No         | 25%             | 50%               |
| Don't know | 8%              |                   |

***Have you ever recommended that a company request for a helmet to be SHARP tested?***

|            | Retailer (n=36) | Distributor (n=4) |
|------------|-----------------|-------------------|
| Yes        | 6%              | 25%               |
| No         | 92%             | 75%               |
| Don't know | 3%              | -                 |

***Do you think manufacturers should have more say in which helmets get tested?***

|            | Retailer (n=36) | Distributor (n=4) |
|------------|-----------------|-------------------|
| Yes        | 58%             | 25%               |
| No         | 36%             | 75%               |
| Don't know | 6%              | -                 |

***If it were possible, do you think companies would pay for a helmet to be SHARP tested were it not selected for test?***

|            | Retailer (n=36) | Distributor (n=4) |
|------------|-----------------|-------------------|
| Yes        | 47%             | 25%               |
| No         | 36%             | 75%               |
| Don't know | 17%             | -                 |

***How important do you think SHARP ratings are to sales of motorcycle helmets in the UK?***

|                      | Retailer (n=36) | Distributor (n=4) |
|----------------------|-----------------|-------------------|
| Not at all important | 6%              | 50%               |
| Quite unimportant    | 19%             | 25%               |
| Neither/nor          | 28%             | -                 |
| Quite important      | 28%             | -                 |
| Very important       | 19%             | 25%               |

***How important is a SHARP rating to you when ordering a helmet for sale in the UK from manufacturers or distributors?***

|                      | Retailer (n=36) | Distributor (n=4) |
|----------------------|-----------------|-------------------|
| Not at all important | 22%             | 75%               |
| Quite unimportant    | 19%             |                   |
| Neither/nor          | 14%             |                   |
| Quite important      | 19%             |                   |
| Very important       | 25%             | 25%               |

***How important do you think SHARP ratings are for consumers in the UK when deciding which helmet to purchase?***

|                      | Retailer (n=36) | Distributor (n=4) |
|----------------------|-----------------|-------------------|
| Not at all important | 6%              | 25%               |
| Quite unimportant    | 14%             | 50%               |
| Neither/nor          | 36%             | 25%               |
| Quite important      | 19%             | -                 |
| Very important       | 25%             | -                 |

***Do you think it should be mandatory for all helmets on sale in the UK to be included in the SHARP helmet safety scheme?***

|            | Retailer (n=36) | Distributor (n=4) |
|------------|-----------------|-------------------|
| Yes        | 69%             | 25%               |
| No         | 22%             | 75%               |
| Don't know | 8%              | -                 |

## Appendix 3: Consumer survey responses and segmentation analysis

*In what year did you purchase your most recent motorcycle helmet?*

|                           | All consumers (n=573) |
|---------------------------|-----------------------|
| 2007                      | 2%                    |
| 2008                      | 4%                    |
| 2009                      | 5%                    |
| 2010                      | 8%                    |
| 2011                      | 8%                    |
| 2012                      | 16%                   |
| 2013                      | 26%                   |
| 2014                      | 24%                   |
| 2015                      | 5%                    |
| Don't know/can't remember | 2%                    |

*Do you own a motorcycle of which you are the main rider?*

|     | All consumers (n=573) |
|-----|-----------------------|
| Yes | 97%                   |
| No  | 3%                    |

*Roughly, how long have you been riding motorcycles on public roads for?*

|                           | All consumers (n=573) |
|---------------------------|-----------------------|
| Less than 2 years         | 5%                    |
| 2 - 3 <sup>11</sup> years | 14%                   |
| 4 - 5 years               | 12%                   |
| 6 - 10 years              | 21%                   |
| 11 - 15 years             | 11%                   |
| 16 - 25 years             | 14%                   |
| 26 - 35 years             | 11%                   |
| 36 - 45 years             | 8%                    |
| 46+ years                 | 4%                    |

<sup>11</sup> i.e. from 2 years and 0 months, to 3 years and 11 months, etc



***Have you had a break from riding motorcycles on public roads of more than one year when you did not ride a motorcycle?***

|     | All consumers (n=573) |
|-----|-----------------------|
| Yes | 42%                   |
| No  | 58%                   |

***What is the engine size of the bike you ride most often on public roads?***

|             | All consumers (n=573) |
|-------------|-----------------------|
| Up to 125cc | 9%                    |
| 126-500cc   | 15%                   |
| 501-750cc   | 28%                   |
| 751-900cc   | 16%                   |
| 901-1500cc  | 29%                   |
| Over 1500cc | 3%                    |

***Which of the following best describes the type of bike that you ride most often?***

|                            | All consumers (n=573) |
|----------------------------|-----------------------|
| Sports Motorcycle          | 18%                   |
| Sports-Touring Motorcycle  | 18%                   |
| Commuting/Roadster         | 11%                   |
| Adventure Motorcycle       | 11%                   |
| Touring Motorcycle         | 9%                    |
| Classic Motorcycle         | 8%                    |
| Scooter                    | 6%                    |
| Custom Motorcycle          | 5%                    |
| Moped                      | 5%                    |
| Super moto Motorcycle      | 3%                    |
| Retro Motorcycle           | 3%                    |
| Off road/Trials Motorcycle | 1%                    |
| Other                      | 1%                    |

(% responding 'yes', ranked by percentage across all respondents)

***Roughly, how old is this bike?***

|                  | All consumers (n=573) |
|------------------|-----------------------|
| Less than 1 year | 5%                    |
| 1 - 2 years      | 17%                   |
| 3 - 4 years      | 34%                   |
| 5 - 10 years     | 29%                   |
| 11+ years        | 15%                   |

***Do you have access to any other bikes in your household?***

|     | All consumers (n=573) |
|-----|-----------------------|
| Yes | 40%                   |
| No  | 60%                   |

***In total, how many bikes do you have access to in your household?***

|    | Consumers with access to<br>>1 bike (n=228) |
|----|---|
| 2  | 58%   |
| 3  | 26%   |
| 4  | 7%  |
| 5+ | 9%  |

***Approximately, what is your average annual mileage on all the bikes you have access to in your household?***

Results for this question are not included as there appeared to be a high level of misunderstanding – respondents potentially provided the mileage of their bike(s) (i.e. the odometer reading) in some cases.

***Do you hold a provisional or full bike licence?***

|   | All consumers (n=573) |
|---|-----------------------|
| Full A (unrestricted, minimum age 24 for direct access, 21 with progressive access) | 75%                   |
| Full AM (Moped)   | 10%                   |
| Provisional   | 7%                    |
| Full A1 (minimum age 17, motorcycles up to 125cc, maximum power 15kW)               | 5%                    |
| Full A2 (minimum age 19, maximum power 35kW)  | 4%                    |

(% responding 'yes', ranked by percentage across all respondents)

***Do you also hold any type of car driving licence? If so which?***

|             | All consumers (n=573) |
|-------------|-----------------------|
| Full        | 93%                   |
| Provisional | 4%                    |
| None        | 3%                    |

***Have you undertaken any additional motorcycle training other than that required to get your motorcycle licence?***

|     | All consumers (n=573) |
|-----|-----------------------|
| Yes | 49%                   |
| No  | 51%                   |

***When and why do you ride your motorcycle?***

|                             | As part of my job<br>(n=573) | Commuting to work/college/school<br>(n=573) | To get to places in my leisure time<br>(n=573) | For the fun of it<br>(n=573) |
|-----------------------------|------------------------------|---|--|------------------------------|
| All year round              | 18%                          | 40%   | 57%  | 54%                          |
| Summer or fair weather only | 15%                          | 29%   | 37%  | 42%                          |
| N/A                         | 67%                          | 31%   | 6%   | 4%                           |

***In general in what type of area do you ride most often?***

|              | All consumers (n=573) |
|--------------|-----------------------|
| Urban        | 28%                   |
| Rural        | 24%                   |
| Both equally | 48%                   |

***Have you experienced any of the following in the last 3 years?***

|   | All consumers (n=573) |
|---|-----------------------|
| Fallen off your motorcycle  | 26%                   |
| Ridden when tired   | 24%                   |
| Know somebody who had a bike accident involving any type of serious injury or death | 19%                   |
| Know somebody who had a bike accident involving a head injury of any severity       | 17%                   |
| Had a motorcycle accident requiring medical treatment                               | 12%                   |
| Fined for speeding on your bike   | 7%                    |
| Had a head injury from a motorcycle accident  | 2%                    |
| Convicted for any other riding offence  | 2%                    |
| None of the above   | 40%                   |

(% responding 'yes', ranked by percentage across all respondents)

***Please indicate the importance of the following to you as a motorcyclist***

| All consumers (n=573)                                       | Not at all important | Quite unimportant | Neither/nor | Quite important | Very important |
|---|----------------------|-------------------|-------------|-----------------|----------------|
| Not having to rely on others/public transport to get around | 3%                   | 3%                | 15%         | 33%             | 46%            |
| Getting away from everyday life                             | 3%                   | 4%                | 16%         | 42%             | 35%            |
| Being able to get to places quicker                         | 3%                   | 5%                | 16%         | 37%             | 38%            |
| Feedback from the bike including noise and vibration        | 7%                   | 6%                | 19%         | 42%             | 26%            |
| Feeling the wind rushing past you                           | 7%                   | 5%                | 27%         | 40%             | 21%            |
| A sense of belonging and camaraderie                        | 7%                   | 8%                | 28%         | 35%             | 21%            |
| A sense of heritage or tradition                            | 10%                  | 10%               | 30%         | 34%             | 16%            |
| Having much more power than in a car of the same price      | 13%                  | 9%                | 28%         | 33%             | 17%            |
| The fact I look good on the bike                            | 24%                  | 16%               | 30%         | 19%             | 11%            |
| Pitting myself against others                               | 39%                  | 19%               | 25%         | 11%             | 7%             |

(Ranked by % responding 'quite/very important')

***How many motorcycle helmets do you currently own?***

|    | All consumers (n=573) |
|----|-----------------------|
| 1  | 30%                   |
| 2  | 43%                   |
| 3  | 20%                   |
| 4  | 3%                    |
| 5+ | 3%                    |

***Did you purchase your most recent motorcycle helmet new or second-hand?***

|             | All consumers (n=573) |
|-------------|-----------------------|
| New         | 95%                   |
| Second-hand | 5%                    |

***Where did you buy your most recent motorcycle helmet from?***

|   | All consumers (n=573) |
|---|-----------------------|
| Motorbike equipment shop                        | 41%                   |
| Motorbike dealer                                | 27%                   |
| Online - motorcycle shop                        | 15%                   |
| Online - direct from manufacturer               | 5%                    |
| Online - other                                  | 5%                    |
| Friend/family                                   | 3%                    |
| Private advertisement (e.g. Gumtree, newspaper) | 2%                    |
| Came with bike                                  | <1%                   |
| Other   | 3%                    |

(% responding 'yes', ranked by percentage across all respondents)

***What type of motorcycle helmet is the one you most recently purchased?***

|            | All consumers (n=573) |
|------------|-----------------------|
| Full face  | 61%                   |
| Flip front | 12%                   |
| Open face  | 27%                   |

**How important were the following factors when choosing your most recent motorcycle helmet?**

|  | Not at all important | Quite unimportant | Neither/ nor | Quite important | Very important |
|--|----------------------|-------------------|--------------|-----------------|----------------|
| Comfort/fit (n=573)                          | 0%                   | <1%               | 3%           | 17%             | 79%            |
| Safety (n=573)                               | <1%                  | 1%                | 5%           | 19%             | 75%            |
| Safety/protection certification (n=571)      | 1%                   | 2%                | 6%           | 25%             | 67%            |
| Ventilation/anti-misting (n=565)             | 1%                   | 3%                | 8%           | 37%             | 52%            |
| Reputation of manufacturer/brand (n=571)     | 2%                   | 3%                | 12%          | 37%             | 46%            |
| Noise (n=569)                                | 2%                   | 3%                | 17%          | 43%             | 35%            |
| Price (n=569)                                | 3%                   | 6%                | 19%          | 48%             | 25%            |
| Recommendation from trusted source (n=557)   | 5%                   | 4%                | 22%          | 37%             | 33%            |
| Looks/ appearance (n=570)                    | 4%                   | 6%                | 25%          | 45%             | 20%            |
| Added features (e.g. built-in radio) (n=527) | 24%                  | 15%               | 31%          | 21%             | 10%            |

(Ranked by % responding 'quite/very important')

**What other types of motorcycle protective clothing do you own and wear most of the time when you ride?**

|                          | All consumers (n=573) |
|--------------------------|-----------------------|
| Motorcycle jacket        | 85%                   |
| Motorcycle gloves        | 84%                   |
| Motorcycle boots         | 76%                   |
| Motorcycle trousers      | 73%                   |
| High visibility clothing | 51%                   |
| Body armour              | 42%                   |
| Motorcycle suit          | 25%                   |
| Other                    | 4%                    |
| None of the above        | 1%                    |

(% responding 'yes', ranked by percentage across all respondents)

### ***Are you aware of the SHARP helmet safety scheme?***

|     | All consumers (n=573) |
|-----|-----------------------|
| Yes | 60%                   |
| No  | 40%                   |

### ***Has your most recent helmet been SHARP tested?***

|            | Those aware of SHARP (n=343) |
|------------|------------------------------|
| Yes        | 64%                          |
| No         | 11%                          |
| Don't know | 25%                          |

### ***How many stars did it get?***

|            | Those whose helmet was SHARP tested (n=219) |
|------------|---|
| 1          | 0%  |
| 2          | 2%  |
| 3          | 15%   |
| 4          | 37%   |
| 5          | 34%   |
| Don't know | 12%   |

### ***How did you first find out that your helmet had been SHARP tested?***

|  | Those whose helmet was SHARP tested (n=219) |
|--|---|
| I looked it up on the SHARP website                  | 33%   |
| It was advertised by the manufacturer                | 16%   |
| It was on the helmet                                 | 16%   |
| The sales person told me                             | 13%   |
| I read it in a review                                | 11%   |
| It was advertised by the place I bought it from      | 6%  |
| I looked it up online (other than the SHARP website) | 2%  |
| A friend or family member told me                    | 1%  |
| Other  | 2%  |

(% responding 'yes', ranked by percentage across all respondents)



**Were you aware of the SHARP rating before you bought the helmet?**

|     | Those whose helmet was SHARP tested (n=219) |
|-----|---|
| Yes | 71%   |
| No  | 29%   |

**Please rate how important the SHARP rating was for your decision to purchase this helmet**

|                      | Those who were aware of the SHARP rating before they bought the helmet (n=155) |
|----------------------|--|
| Not at all important | 1%   |
| Quite unimportant    | 3%   |
| Neither/ nor         | 8%   |
| Quite important      | 37%  |
| Very important       | 51%  |

**Were you aware of other helmets having a SHARP rating when you purchased your helmet?**

|     | Those aware of SHARP (n=343) |
|-----|------------------------------|
| Yes | 74%                          |
| No  | 26%                          |

**Did you visit the SHARP helmet safety scheme website when you were looking for your helmet?**

|                | Those aware of SHARP (n=343) |
|----------------|------------------------------|
| Yes            | 44%                          |
| No             | 48%                          |
| Can't remember | 8%                           |

**Please rate how useful you found the SHARP website**

|                   | Those who visited the SHARP website (n=149) |
|-------------------|---|
| Not at all useful | 0%  |
| Not very useful   | 1%  |
| Neither/ nor      | 5%  |
| Quite useful      | 36%   |
| Very useful       | 59%   |

**Were you given a SHARP pocket information guide when you were looking for a new helmet?**

|                | Those aware of SHARP (n=343) |
|----------------|------------------------------|
| Yes            | 27%                          |
| No             | 62%                          |
| Can't remember | 12%                          |

**Please rate how useful you found the pocket guide**

|                   | Those who were given an information guide (n=91) |
|-------------------|--|
| Not at all useful | 2%   |
| Not very useful   | 7%   |
| Neither/ nor      | 18%  |
| Quite useful      | 35%  |
| Very useful       | 38%  |

**Please indicate your agreement with the following statements on a scale of 'Strongly agree' to 'Strongly disagree'**

|  | Strongly disagree | Disagree | Neither /nor | Agree | Strongly agree | Don't know |
|--|-------------------|----------|--------------|-------|----------------|------------|
| I am more likely to trust a manufacturer if their helmets have been SHARP tested | 2%                | 5%       | 17%          | 41%   | 34%            | 1%         |
| I would feel safer wearing a 5-star SHARP rated helmet                           | 2%                | 6%       | 16%          | 37%   | 37%            | 1%         |

|  | Strongly disagree | Disagree | Neither /nor | Agree | Strongly agree | Don't know |
|--|-------------------|----------|--------------|-------|----------------|------------|
| I would always pay attention to SHARP ratings when buying a helmet                                     | 2%                | 6%       | 21%          | 35%   | 36%            | 1%         |
| Buying a SHARP rated helmet shows I care about my safety   | 1%                | 10%      | 20%          | 38%   | 30%            | 1%         |
| SHARP tested helmets are safer than non-SHARP tested helmets   | 1%                | 7%       | 24%          | 35%   | 31%            | 1%         |
| A 5-star SHARP rated helmet would protect me more than a 3-star SHARP rated helmet if I was in a crash | 2%                | 5%       | 23%          | 37%   | 28%            | 5%         |
| If all helmets were SHARP tested it would help me choose a safer helmet                                | 4%                | 12%      | 19%          | 36%   | 27%            | 2%         |
| A SHARP rating shows that the helmet is good quality   | 4%                | 12%      | 19%          | 36%   | 27%            | 2%         |
| I would discuss the SHARP rating of a new helmet with fellow riders                                    | 5%                | 11%      | 26%          | 31%   | 24%            | 2%         |
| Most riders I know have heard of SHARP helmet ratings  | 2%                | 8%       | 26%          | 37%   | 17%            | 10%        |
| Buying a SHARP rated helmet shows you are a responsible rider  | 6%                | 14%      | 27%          | 28%   | 24%            | 1%         |
| Not enough helmets are SHARP tested  | 1%                | 6%       | 31%          | 31%   | 21%            | 10%        |

|  | Strongly disagree | Disagree | Neither /nor | Agree | Strongly agree | Don't know |
|--|-------------------|----------|--------------|-------|----------------|------------|
| I would feel proud wearing a 5-star SHARP rated helmet                     | 4%                | 9%       | 36%          | 24%   | 25%            | 2%         |
| I would feel uncomfortable wearing a helmet that had not been SHARP tested | 7%                | 16%      | 27%          | 26%   | 22%            | 3%         |
| SHARP ratings should be about more than just safety                        | 5%                | 15%      | 27%          | 28%   | 19%            | 5%         |
| A 1-star helmet does not meet minimum safety standards                     | 11%               | 17%      | 21%          | 16%   | 15%            | 20%        |
| SHARP tested helmets will fit better than non-SHARP tested helmets         | 18%               | 19%      | 28%          | 16%   | 12%            | 7%         |
| You can tell a SHARP rated helmet by the look of it                        | 21%               | 24%      | 26%          | 14%   | 10%            | 5%         |
| Only helmets from major brands are SHARP tested                            | 11%               | 22%      | 25%          | 13%   | 10%            | 17%        |
| SHARP ratings are meaningless  | 29%               | 30%      | 20%          | 10%   | 7%             | 5%         |

(Ranked by % responding 'agree/strongly agree')

### ***What helmet safety standards are you aware of?***

|                              | All consumers (n=573) |
|------------------------------|-----------------------|
| British Standard (Kite Mark) | 82%                   |
| UN 'E' Mark (ECER22-05)      | 35%                   |
| US DOT                       | 20%                   |
| Snell                        | 30%                   |
| ACU Gold Sticker             | 54%                   |
| Other                        | 2%                    |
| None                         | 5%                    |

(% responding 'yes', ranked by percentage across all respondents)

### **Gender**

|                      | All consumers (n=573) |
|----------------------|-----------------------|
| Male                 | 80%                   |
| Female               | 19%                   |
| Prefer not to answer | 1%                    |

### **Age**

|       | All consumers (n=573) |
|-------|-----------------------|
| 16-24 | 6%                    |
| 25-34 | 23%                   |
| 35-44 | 21%                   |
| 45-54 | 25%                   |
| 55-64 | 19%                   |
| 65+   | 8%                    |

### **Marital status and current residential situation**

|  | All consumers (n=573) |
|--|-----------------------|
| Married/living with partner                  | 76%                   |
| Separated/divorced/widowed                   | 5%                    |
| Single and living with parent(s)/relative(s) | 6%                    |
| Single and living in own household           | 11%                   |
| Prefer not to answer                         | 2%                    |

### **Children**

|                      | All consumers (n=573) |
|----------------------|-----------------------|
| Yes                  | 63%                   |
| No                   | 35%                   |
| Prefer not to answer | 2%                    |

### **Occupation of the main income earner**

|   | All consumers<br>(n=573) |
|---|--------------------------|
| Higher managerial / professional / administrative                           | 13%                      |
| Intermediate managerial / professional / administrative                     | 39%                      |
| Supervisory or clerical / junior managerial / professional / administrative | 25%                      |
| Skilled manual worker   | 12%                      |
| Semi or unskilled manual work   | 7%                       |
| Full time education   | 1%                       |
| Home maker  | <1%                      |
| Disabled or full time carer for someone disabled                            | <1%                      |
| Retired - State pension only  | 3%                       |
| Unemployed for 6+ months  | 1%                       |

### **Segmentation analysis**

Two-step segmentation was utilised in SPSS in order to allow the use of categorical and continuous variables as necessary in the analysis. Initial attempts to segment on the basis of the 10 'golden questions' from Christmas et al. (2009) failed to find a robust model. Cluster quality was poor under all solutions, whether allowing the two-step segmentation to automatically discover the number of clusters, or whether forcing a seven cluster solution on the basis of the seven clusters found in Christmas et al. (2009).

Attention then turned to using demographic and riding variables as the basis of segmentation, and the best cluster solution (two clusters) found was based on the following variables (listed in order of their importance in predicting cluster membership):

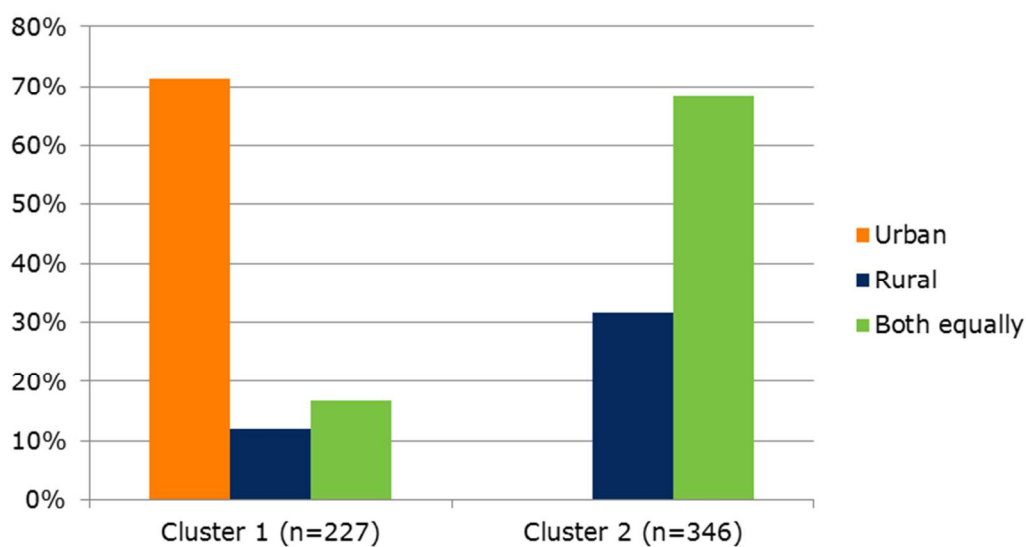
- Urban/rural mix of riding (Q14)
- Gender (Q36)
- Age (Q37)
- Bike engine size (Q4)

Figure 34 to Figure 37 demonstrate how each cluster varies on these characteristics.

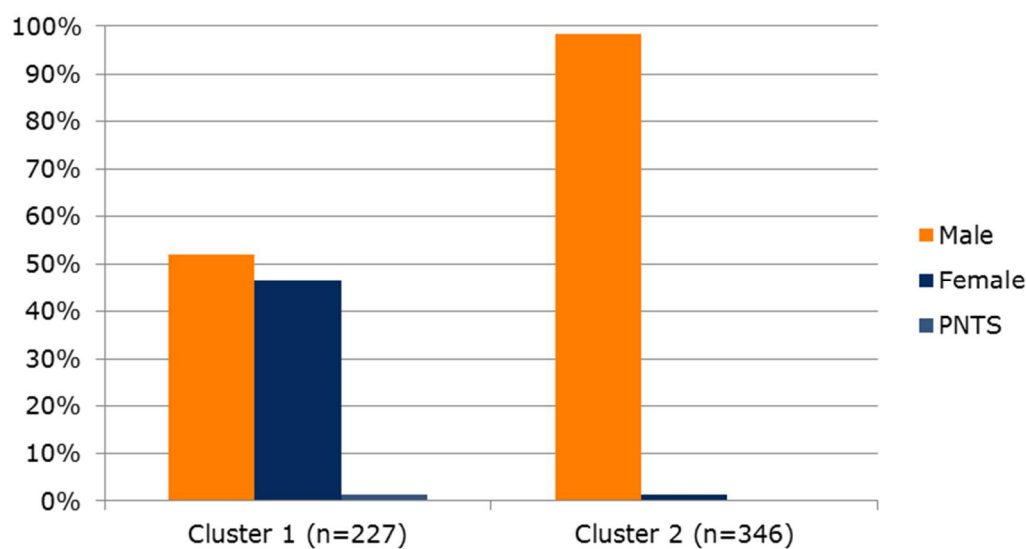
In summary:

Cluster 1 comprises riders who are generally riding in urban areas most frequently, comprise both genders about equally, tend to be in younger age bands, and tend to ride slightly smaller machines.

Cluster 2 comprises riders who generally report riding rural areas most often (or both urban and rural areas equally), are almost exclusive male, tend to be in older age bands, and tend to ride larger machines.

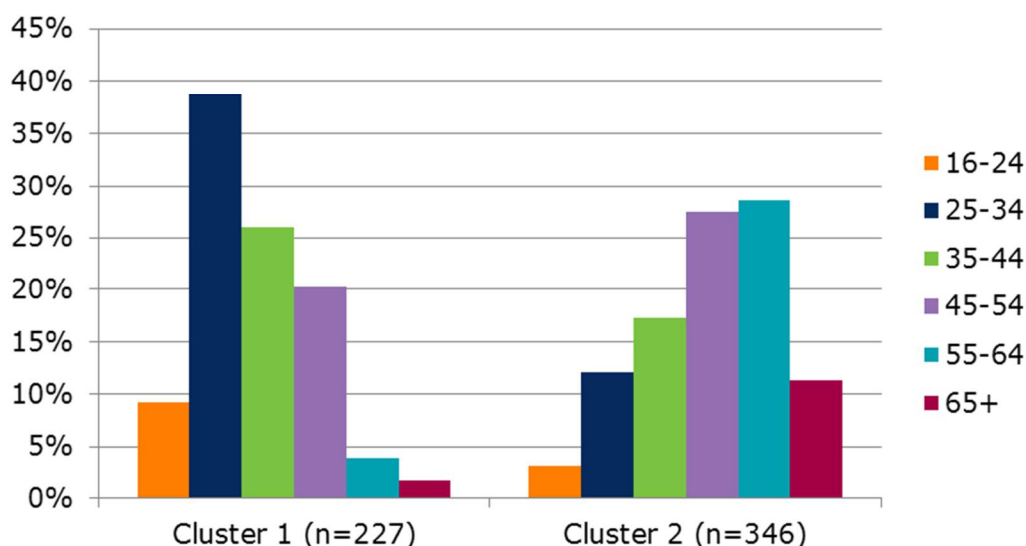


**Figure 34. Urban/rural riding**

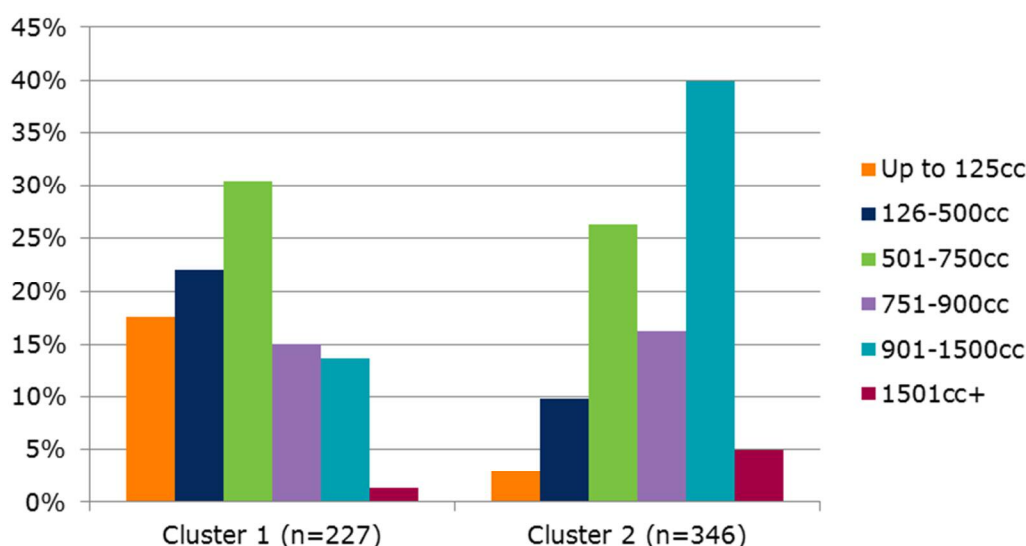


**Figure 35. Gender (PNTS = prefer not to say)**





**Figure 36. Age group**



**Figure 37. Count by cluster and engine size of bike**

### ***Cluster comparison on simple variables***

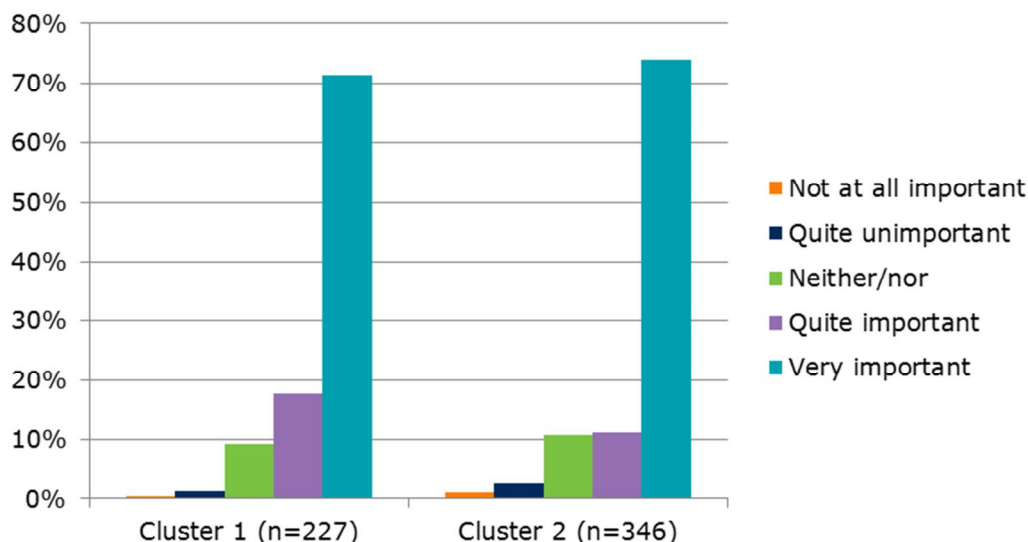
Once clusters were identified, analyses were run to establish whether they differed on their responses to any of the relevant questions about SHARP. These analyses found that clusters did not differ significantly on the following variables:

- Awareness of SHARP (Cluster 1 59% yes, Cluster 2 60.4% yes) –  $p=.743$
- Whether their most recent helmet was SHARP tested (Cluster 1 70.1%, Cluster 2 59.8%) –  $p=.071^{12}$
- Number of stars the helmet had on the SHARP rating (means of 4.15 and 4.18 for Cluster 1 and Cluster 2 respectively) –  $p=.700$

<sup>12</sup> The proportion of 'don't know' responses was 18.7% in Cluster 1 and 29.7% in Cluster 2, and it is this that seems to be responsible for the fact that this association did approach statistical significance (but did not reach it).

- Whether they were aware of the SHARP rating before they bought their helmet (Cluster 1 69.1% yes, Cluster 2 72% yes) –  $p=.646$

In contrast, the clusters did differ significantly on their perceived importance of the SHARP rating for their helmet to their decision to buy. Figure 38 shows these data. Although both clusters rate the SHARP rating as important, Cluster 2 is more likely to rate it as 'very important' in their buying decision.



**Figure 38. Rating of importance of SHARP in buying decision**

### ***Cluster comparison on attitudes to SHARP***

The final variable used to compare clusters was 'attitudes to SHARP'. This was measured using Q34, which was a single scale comprising 20 item statements with which respondents could indicate a level of agreement or disagreement. The actual scale can be seen in Appendix 9, but some examples statements are given here:

- "A 1-start helmet does not meet minimum safety standards"
- "SHARP ratings are meaningless"
- "I would always pay attention to SHARP ratings when buying a helmet"
- "Most riders I know have heard of SHARP helmet ratings"

The scale on which respondents rated agreement/disagreement was as follows:

Strongly agree – Agree – Neither – Disagree – Strongly Disagree

The scale was first subject to factor analysis (actually a principal components analysis). This technique seeks to understand what a scale with multiple items is really measuring. For example, it can tell us if the scale is measuring multiple underlying attitudes towards SHARP (in the extreme, a 20 item scale might measure 20 unrelated attitudes or opinions towards the variable of interest – if respondents score high or low on one item this will have no relation to whether they score high or low on other items), or if answers to the items group together and co-vary (in the extreme example there may be only a single underlying attitude measured by all the items – if respondents score high or low on one item they would be expected to score high or low on other items too).

Using data from the 212 respondents with complete data for Q34, first the data were checked for suitability for factor analysis.

First all variables from Q34 were viewed in a correlation matrix to ensure that there were no items with either very strong correlations ( $>.9$ ) with some other items, or with only very weak correlations ( $<.3$ ) with all other items. No such items were found, and so no items were excluded from the analysis.

Second, the Kaiser-Meyer-Olkin measure of sampling adequacy was checked, and was found to be sufficiently high for factor analysis to apply (.931).

Third, Bartlett's test of sphericity was found to be highly significant, indicating that the population correlation matrix did not resemble an identity matrix, meaning that again the data were appropriate for factor analysis.

A principal components analysis was then run, and showed that a two factor solution was sufficient to explain 55.1% of the variance. A two factor solution was suggested as optimal both through the inclusion of factors only with eigen values over 1, and through inspection of a scree plot.

Varimax rotation was used to rotate the factors and enhance the interpretability of the solution. The following table shows the loadings of each item onto each factor.

**Table 25. Factor loadings**

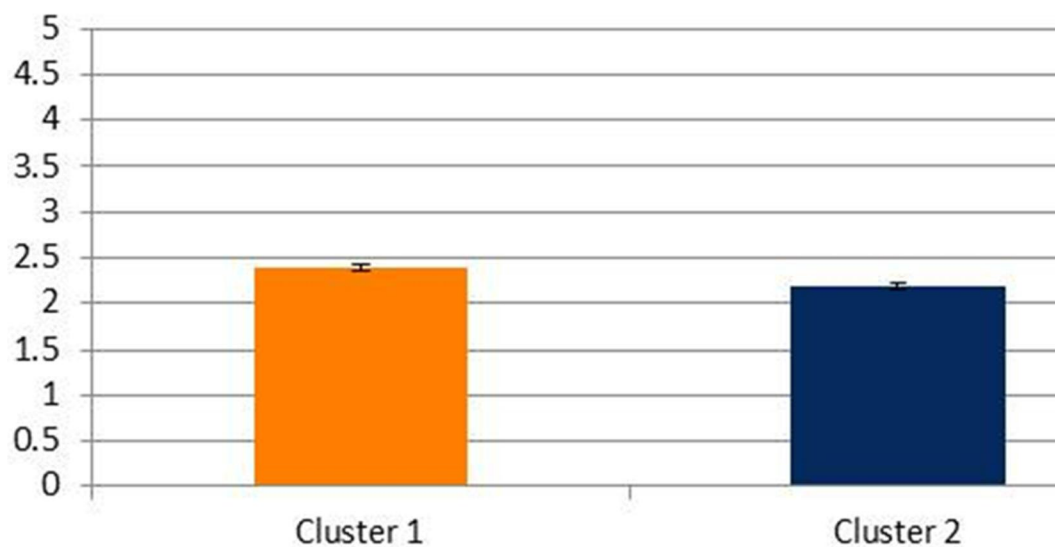
|  | Factor |      |
|--|--------|------|
|  | 1      | 2    |
| A 1-star helmet does not meet minimum safety standards   |        | .617 |
| A 5-star SHARP rated helmet would protect me more than a 3-star SHARP rated helmet if I was in a crash | .706   |      |
| SHARP ratings are meaningless  | -.405  | .606 |
| Not enough helmets are SHARP tested  | .340   |      |
| SHARP ratings should be about more than just safety  |        | .602 |
| SHARP tested helmets are safer than non-SHARP tested helmets   | .518   | .586 |
| I would always pay attention to SHARP ratings when buying a helmet                                     | .785   |      |
| If all helmets were SHARP tested it would help me choose a safer helmet                                | .736   |      |
| A SHARP rating shows that the helmet is good quality   | .534   | .517 |
| SHARP tested helmets will fit better than non-SHARP tested helmets                                     |        | .831 |
| I would discuss the SHARP rating of a new helmet with fellow riders                                    | .636   |      |
| Most riders I know have heard of SHARP helmet ratings  |        | .380 |
| Only helmets from major brands are SHARP tested  |        | .748 |
| Buying a SHARP rated helmet shows you are a responsible rider  | .574   | .527 |
| You can tell a SHARP rated helmet by the look of it  |        | .871 |
| I would feel safer wearing a 5-star SHARP rated helmet   | .820   |      |
| Buying a SHARP rated helmet shows I care about my safety   | .792   |      |
| I am more likely to trust a manufacturer if their helmets have been SHARP tested                       | .814   |      |
| I would feel proud wearing a 5-star SHARP rated helmet   | .624   | .471 |
| I would feel uncomfortable wearing a helmet that had not been SHARP tested                             | .604   | .310 |

Based on those items loading exclusively/most strongly onto the two factors, the following factor names were used:

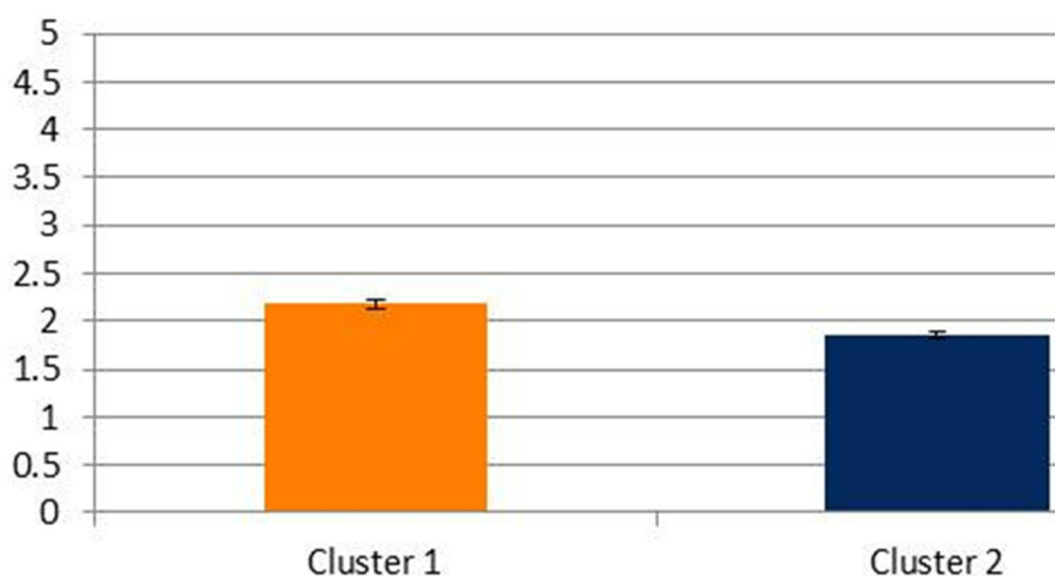
- Factor 1: 'SHARP as safety'
- Factor 2: 'SHARP as look/brand/feel too'

Factor scores were then calculated by multiplying each Q34 item score by its factor loading (item loadings below .3 were ignored for this purpose), summing all these for items loading onto Factor 1 and Factor 2 separately, and then dividing by the number of items loading on each.

Finally, clusters were compared for their scores on each factor. This analysis showed that for both factors, Cluster 1 scores were significantly higher than those for Cluster 2 ( $p < .001$  in both cases). This suggests that Cluster 1 agrees more that SHARP is relevant to safety, and that SHARP is also relevant to things in addition to safety, than Cluster 2. Figure 39 and Figure 40 show these data.



**Figure 39. Factor 1 scores by cluster**



**Figure 40. Factor 2 scores by cluster**

## Appendix 4: Road Safety Officer, motorcycle trainer and police interviews and focus groups

This appendix provides a summary of the findings from the three stakeholder groups involved in Task 4.

### RSOs

#### *Current and past initiatives*

The main initiatives undertaken by RSOs for motorcyclist safety included the promotion of a local biker magazine (e.g. 'Scottish Biker' and 'Sussex Biker'). The aim of these magazines was viewed to be 'informative and educational'. Some RSOs also reported engaging with motorcyclists through training courses (e.g. Bike Safe), and school or group visits. Participants who reported using SHARP mentioned it was only used as an extra resource, and was usually provided as a leaflet for people to pick up.

*"It's quite useful to bulk up the stuff that we give out."*

Other RSOs reported having promoted SHARP in the past, but no longer using it as a resource.

*"I just had the SHARP leaflet a couple of years ago."*

However, the lack of use and promotion of SHARP by local councils were believed to relate to a number of issues, including a perceived lack of interest.

*"I find it difficult to distribute, people weren't really picking them up."*

Similarly, some believed that provided in different formats it could potentially have a better uptake.

*"So that we don't have to spend the time doing the research, if we had perhaps a web-ready link that we could link to, that would be good and maybe more would happen if it were done for you... "*

However, the reality of current budget cuts in local authorities was also a limitation to the promotion of initiatives such as SHARP.

*"Obviously the capacity for all the emergency services and us is limited these days and is limiting, you know there's less and less time and money."*

*"The time that I'm able to get involved in campaigns has been significantly reduced... you're limited to how much time you're allowed to actually dedicate to that..."*

In terms of promotion SHARP through key stakeholders such as police and local authorities, it is important to take into consideration the limitations in terms of time and budget that these groups face. While local authorities face ever-changing roles and budget cuts, police face staff shortages and constant demands on their time.

#### *Other RSO comments*

Due to limitations relating to the scope of this research, it was only possible to undertake interviews with five RSOs. However, during recruitment of RSOs a number of short

responses were received regarding their knowledge and use of SHARP. The table below shows some of the general themes established by the interviewer during recruitment:

| Knowledge of SHARP  | Use of SHARP  |
|---|---|
| Not heard of SHARP  | Gives out leaflets  |
| Not aware of SHARP  | Has given out leaflets but not recently   |
| No dealings with SHARP  | Not promoted as much due to budget cuts   |
| Not heard of SHARP, promotes 'Bikesafe'   | Aware of SHARP but does not promote it and due to budget cuts no longer gives motorcycle training |
| Not heard of SHARP, asked for information   | Information given out at events but not picked up much  |
| Not aware of SHARP, do not deal with motorcycle road safety education-this is done through local police |   |

## Trainers

### Teaching about SHARP

Trainers were the group most likely to know and use SHARP. However, even among this group there were differences relating to how SHARP is used. Some participants reported they hand out SHARP leaflets as part of the general Personal Protection Equipment information provided through the training.

*"Quite often the instructors will say there is a SHARP rating, there is a test which you can refer to if you want to find out if your helmet is safe enough."*

One participant reported using the SHARP rating system interactively when teaching students.

*"We bring in the SHARP report and the website and suggest they check out the helmet they would like to buy on the SHARP report to see what the safety rating is."*

Compliance with regulations was mentioned by some participants in relation to helmet selection and training.

*"The first thing is that we say it has to comply to the EC regulations, that's the first requirement."*

However, because of this, compliance with legislation seems to become the focus of the purchase decision with regards to safety.

*"I was saying to them that the SHARP test gives you a rating on comfort, fit and safety aspect of it, however it doesn't matter what that says, what you're interested in is whether it complies to the EU regulations."*

### Other trainer comments

During contact with trainers to recruit for the interviews and focus group, a number of short responses were received via email and telephone regarding their knowledge and use of SHARP, as shown in the table below:

| Knowledge of SHARP                     | Use of SHARP                               | Other feedback  |
|--|--|---|
| Has heard of SHARP                     | Has leaflets                               | Not respected as a good standard, known throughout the industry, not all helmets tested |
| Not heard of SHARP (several responses) | Has leaflets but does not actively promote | Aware of SHARP but finds customers driven by price not safety                           |
|  | Hands out leaflets to trainees             |   |
|  | Does promote SHARP                         |   |
|  | Knows about SHARP and informs riders of it |   |

## Police

### Collision investigation

Some participants were able to provide information regarding the data collection process followed at collisions. One participant reported that they collect detailed data about the helmet, however, SHARP ratings are not noted (unless the helmet has the rating printed on).

*"Generally we'd collect make, model, type, whether it's still on somebody...what condition it's in... what type of visor is used...we'd photograph it inside and out. Anything that's on it, we would record."*

However, this data was mostly recorded for the collision investigation report. One participant (a collision investigator) mentioned that even though they collect the data as part of the investigation, data regarding the helmet is very rarely requested.

*"No one would ask anything about the crash helmet at all, only whether it was on or off."*

The collection of data specific to the helmet used by the motorcyclists involved in a collision is not standardised, and it is important to note that this information is not required in the STATS19 accident data collection form. However, participants generally believed that although the helmet offers important head protection, it is usually other sustained injuries which may lead to the fatality.

*"The helmet is not the thing that would have saved them anyway."*

*"The neck is the weakest part of the scenario."*



## Appendix 5: Task 2 In-depth interview guide (Distributors and retailers)

### Aim

**[For researcher only]**

**The aim of this task is to explore the effects of SHARP ratings on helmet manufacturers' and distributors' marketing strategies.**

### Introduction and consent (5 mins max)

- Introduce self and independent research company Public Knowledge
- Public Knowledge have been commissioned by the Department for Transport to conduct some interviews with motorcycle helmet distributors to understand how SHARP ratings are currently used within the marketing of motorcycle helmets and how the scheme could be improved for consumers.
- This interview will be conducted in accordance with the Market Research Society Code of Conduct and will last around 30-45 minutes, dependent on your answers. The interview will be recorded for later analysis but your responses will remain anonymous and are completely confidential. Your name won't be identified in any results or reporting.
- We want to hear your genuine thoughts – there are no right or wrong answers
- As discussed within the email invitation, we are providing £40 incentives for your time and feedback today, this can be in the form of a charity donation (RNLI, Headway, Save the Children) or a monetary payment. Which would you prefer?

### Participants

For the purposes of the recorder could you state your name, the name and location of your business and your position within the company.

### About you and your company (5 mins max)

- Please briefly describe your job and the responsibilities of your role.
- Please briefly describe your company (e.g. name, location, countries of operation, range of products).
- How long have you worked for the company?
- How long has your company been involved in the distribution of motorcycle helmets?
- What motorcycle helmet brands does your company distribute?

***[If too many to mention then what brands do they distribute most?]***

### Marketing (~10 mins)

- What information do you look for from *manufacturers* when deciding which helmets to distribute in the UK?
  - ***[Prompts (examples)]***: Helmet type, helmet style, features, brand, name, comfort, aerodynamics, noise, price

- Of those you have mentioned **[recap list]** can you define a top three in order of importance?
- **[Additional prompt if not mentioned]**: What about safety? Do you look for information related to safety?
- What marketing media do you look at when selecting helmets to distribute?
- [Prompts (examples)]**: packaging; point-of-sale displays; show stands; sports endorsement; magazines; websites; social media; tv
- What information do you highlight to encourage *your customers* to buy your helmets in the UK?
  - **[Prompts (examples)]**: Helmet type, helmet style, features, brand, name, comfort, aerodynamics, noise, price
  - Of those you have mentioned **[recap list]** can you define a top three in order of importance?
  - **[Additional prompt if not mentioned]**: What about safety? How is that marketed?
  - What marketing media do you use to target customers in the UK? **[Prompts (examples)]**: packaging; point-of-sale displays; show stands; sports endorsement; magazines; websites; social media; tv
- You have mentioned safety as one of the factors in your marketing. How do you market the safety of your helmets in the UK?
  - Do you use any ratings scheme to demonstrate the safety of your helmets?

## Consumers (~5 mins)

- What do you think consumers in the UK want from a motorcycle helmet?
  - **[Prompts (examples)]**: Helmet type, helmet style, features, brand, name, price, comfort, aerodynamics, noise
  - What do you think are the top three factors for consumers in order of importance, with the first factor being the most important?
  - **[Additional prompt if not mentioned]**: What about safety? How is that marketed to consumers?
  - Why do you think safety is or is not important to consumers?
- Are all consumers in the UK the same when it comes to buying a helmet?
  - If no, have you (or your company) identified types of helmets that are likely to be targeted at certain consumer groups?
  - Can you briefly define those consumer groups for me?
  - If at all, how do those groups differ with regard to their views on helmet safety?
  - If at all, how do your marketing strategies differ when targeting these groups?
- From the consumers' perspective how important is the motorcycle helmet compared with other items of motorcycle protective equipment?

- On a scale from 1 to 10, where 1 is 'Not at all popular' and 10 is 'Extremely popular', please rate the popularity of the following helmet styles in the UK at the moment?

**[Select one response in each row]**

|                    | Not at all popular |   |   |   |   |   |   |   | Extremely popular |    |
|--------------------|--------------------|---|---|---|---|---|---|---|-------------------|----|
|                    | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Touring            |                    |   |   |   |   |   |   |   |                   |    |
| Sport              |                    |   |   |   |   |   |   |   |                   |    |
| Dirt/Motocross     |                    |   |   |   |   |   |   |   |                   |    |
| Modular/Flip-front |                    |   |   |   |   |   |   |   |                   |    |
| Open face          |                    |   |   |   |   |   |   |   |                   |    |
| Scooter            |                    |   |   |   |   |   |   |   |                   |    |
| Other              |                    |   |   |   |   |   |   |   |                   |    |

(Please specify \_\_\_\_\_)

### SHARP ratings (~15 mins)

- Are you aware of the SHARP helmet safety scheme?
  - [If yes, continue with questions below]**
  - [If no, read out following statement and then ask if they now recall the scheme. If they still do not know the SHARP helmet safety scheme then thank and close.]**

The SHARP helmet safety scheme came into being in 2007, after the Department for Transport found differences in the safety performance of motorcycle helmets available in the UK. While all helmets have to meet minimum safety standards, research showed that up to 50 lives could be saved each year if motorcyclists wore the safest helmets available to them.

Taking the best bits from current standards around the world, SHARP puts motorcycle helmets through a more rigorous and targeted testing process.

Thanks to a simple five star scoring system, SHARP provides motorcyclists with independent and objective advice, revealing the different safety performances of UK motorcycle helmets.

- Can you describe what you understand the SHARP helmet safety scheme to be?

### Helmet testing and SHARP ratings

- Of the helmets you sell in the UK, approximately what proportion have been SHARP tested?

**[If more than 'none']:**

- What is the lowest and highest SHARP rating of helmets that you distribute in the UK?
- How do you use SHARP ratings to market, promote or sell motorcycle helmets in the UK?

**[All participants]:**

- If at all, how and where did you/do you/would you market the SHARP test rating for a **1 star rated helmet**?

**[Prompts (examples)]:** on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv

- If at all, how and where did you/do you/would you market the SHARP test rating for a **3 star rated helmet**?

**[Prompts (examples)]:** on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv

- If at all, how and where did you/do you/would you market the SHARP test rating for a **5 star rated helmet**?

**[Prompts (examples)]:** on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv

- How would you describe the difference between a **1 star rated helmet** and **3 star rated helmet** to your clients?
- How would you describe the difference between a **3 star rated helmet** and **5 star rated helmet** to your clients?
- How much do you think SHARP ratings affect *your* sales of motorcycle helmets in the UK?
  - How does a SHARP rating affect orders of a helmet from those you distribute to in the UK?
  - How much do you think SHARP ratings affect sales of helmets across the market in the UK?
- Do you think manufacturers should have more say in which helmets get tested?

**Consumers**

- How valuable do you think SHARP ratings are for consumers in the UK when deciding which helmet to purchase?
- Do you think the star rating gives the consumer enough information?
- Do you think the SHARP helmet safety scheme could be made more desirable for:
  - Manufacturers? If yes, how?
  - Distributors? If yes, how?
  - Consumers? If yes, how?
- Do you think that the SHARP helmet safety scheme should be mandatory for all helmets? Why do you say that?

**[Thank and close]**

## Appendix 6: Task 2 In-depth interview guide (Manufacturers)

### Prior to the interview

*[For researcher only]*

Please check the manufacturer's ratings at <http://sharp.direct.gov.uk/home>

In the 'Helmet Search' box, find the manufacturer and then click search. When the list of helmets appears, click on the 'Rating' heading to sort by rating and note the lowest and highest star rating for use during the interview.

### Aim

*[For researcher only]*

The aim of this task is to explore the effects of SHARP ratings on helmet manufacturers' and distributors' marketing strategies.

### Introduction and consent (5 mins max)

- Introduce self and independent research company Public Knowledge
- Public Knowledge have been commissioned by the Department for Transport to conduct some interviews with motorcycle helmet distributors to understand how SHARP ratings are currently used within the marketing of motorcycle helmets and how the scheme could be improved for consumers.
- This interview will be conducted in accordance with the Market Research Society Code of Conduct and will last around 30-45 minutes, dependent on your answers. The interview will be recorded for later analysis but your responses will remain anonymous and are completely confidential. Your name won't be identified in any results or reporting.
- We want to hear your genuine thoughts – there are no right or wrong answers
- As discussed within the email invitation, we are providing £40 incentives for your time and feedback today, this can be in the form of a charity donation (RNLI, Headway, Save the Children) or a monetary payment. Which would you prefer?

### Participants

For the purposes of the recorder could you state your name, the name and location of your business and your position within the company.

### About you and your company (5 mins max)

- Please briefly describe your job and the responsibilities of your role.
- Please briefly describe your company (e.g. name, location, countries of operation, range of products).
- How long have you worked for the company?
- How long has your company been involved in the manufacture of motorcycle helmets?
- What motorcycle helmet brands does your company manufacture?
- What are your company's routes to market for the sale of motorcycle helmets?
  - Do you sell motorcycle helmets directly?

- What type of distributors or sellers do you use?

## Marketing (~10 mins)

- What information do you highlight to encourage *distributors* to distribute your product in the UK?
  - **[Prompts (examples)]**: Helmet type, helmet style, features, brand, name, comfort, aerodynamics, noise, price
  - Of those you have mentioned **[recap list]** can you define a top three in order of importance?
  - **[Additional prompt if not mentioned]**: What about safety? How is that marketed?
  - What marketing media do you use to encourage distributors to stock your helmets? **[Prompts (examples)]**: packaging; point-of-sale displays; show stands; sports endorsement; magazines; websites; social media; tv
- What information do you highlight to encourage *consumers* to purchase your product in the UK?
  - **[Prompts (examples)]**: Helmet type, helmet style, features, brand, name, comfort, aerodynamics, noise, price
  - Of those you have mentioned **[recap list]** can you define a top three in order of importance?
  - **[Additional prompt if not mentioned]**: What about safety? How is that marketed?
  - What marketing media do you use to target consumers? **[Prompts (examples)]**: packaging; point-of-sale displays; show stands; sports endorsement; magazines; websites; social media; tv
- You have mentioned safety as one of the factors in your marketing. How do you market the safety of your helmets in the UK?
  - If at all, how does the information you use to demonstrate safety differ between distributors and consumers?
  - Do you use any ratings scheme to demonstrate the safety of your helmets?

## Consumers (~5 mins)

- What do you think consumers in the UK want from a motorcycle helmet?
  - **[Prompts (examples)]**: Helmet type, helmet style, features, brand, name, price, comfort, aerodynamics, noise
  - What do you think are the top three factors for consumers in order of importance, with the first factor being the most important?
  - **[Additional prompt if not mentioned]**: What about safety? How is that marketed to consumers?
  - Why do you think safety is or is not important to consumers?
- Are all consumers in the UK the same when it comes to buying a helmet?
  - If no, have you (or your company) identified types of helmets that are likely to be targeted at certain consumer groups?
  - Can you briefly define those consumer groups for me?

- If at all, how do those groups differ with regard to their views on helmet safety?
- If at all, how do your marketing strategies differ when targeting these groups?
- From the consumers' perspective how important is the motorcycle helmet compared with other items of motorcycle protective equipment?
- On a scale from 1 to 10, where 1 is 'Not at all popular' and 10 is 'Extremely popular', please rate the popularity of the following helmet styles in the UK at the moment?

**[Select one response in each row]**

|                    | Not at all popular |   |   |   |   |   |   |   | Extremely popular |    |
|--------------------|--------------------|---|---|---|---|---|---|---|-------------------|----|
| Touring            | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Sport              | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Dirt/Motocross     | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Modular/Flip-front | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Open face          | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Scooter            | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Other              | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |

(Please specify \_\_\_\_\_)

## SHARP ratings (~15 mins)

- Are you aware of the SHARP helmet safety rating scheme?
  - **[If yes, continue with questions below.]**
  - **[If no, read out following statement and then ask if they now recall the scheme. If they still do not know the SHARP helmet safety scheme then thank and close.]**

The SHARP helmet safety scheme came into being in 2007, after the Department for Transport found differences in the safety performance of motorcycle helmets available in the UK. While all helmets have to meet minimum safety standards, research showed that up to 50 lives could be saved each year if motorcyclists wore the safest helmets available to them.

Taking the best bits from current standards around the world, SHARP puts motorcycle helmets through a more rigorous and targeted testing process.

Thanks to a simple five star scoring system, SHARP provides motorcyclists with independent and objective advice, revealing the different safety performances of UK motorcycle helmets.

- Can you describe what you understand the SHARP helmet safety scheme to be?

## Helmet testing and SHARP ratings

- Of the helmets you sell in the UK, approximately what proportion have been SHARP tested?

**[IF SHARP RATINGS KNOWN FROM WEBSITE]**

- From the SHARP website, the lowest rating for your brand is **[state lowest rating]** and the highest rating is **[state highest rating]**.
  - Is that correct?
  - If at all, how and where did you/do you/would you market the SHARP test rating for the **[state lowest rating]** helmet(s)?  
**[Prompts (examples)]**: on helmet, packaging; point-of-sale displays; show stands; magazines; websites; social media; tv
  - If at all, how and where did you/do you/would you market the SHARP test rating for the **[state highest rating]** helmet(s)?  
**[Prompts (examples)]**: on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv

**[IF SHARP RATINGS NOT KNOWN]**

- If at all, how and where did you/do you/would you market the SHARP test rating for a **1 star rated helmet**?  
**[Prompts (examples)]**: on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv
- If at all, how and where did you/do you/would you market the SHARP test rating for a **3 star rated helmet**?  
**[Prompts (examples)]**: on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv
- If at all, how and where did you/do you/would you market the SHARP test rating for a **5 star rated helmet**?  
**[Prompts (examples)]**: on helmet, packaging; point-of-sale displays; show stands; magazines; social media; tv

**[ALL PARTICIPANTS FROM HERE]**

- How would you describe the difference between a **1 star rated helmet** and **3 star rated helmet** to your clients?
- How would you describe the difference between a **3 star rated helmet** and **5 star rated helmet** to your clients?

**Requests for SHARP testing**

- Does your company request for helmets to be SHARP tested?  
**[If yes]**
  - Does your company request for all helmets or just some helmets to be SHARP tested?
  - Why do you request SHARP testing of all/some **[delete as applicable]** of your helmets?
  - **[If some]**: How do you decide which helmets are requested to be SHARP tested, and which helmets are not?
- [If no]**
  - Why do you not request for any of your helmets to be SHARP tested?
- Would you like to have more say in which helmets are SHARP tested and which helmets are not?



- What difference would it make if the manufacturer could decide which helmets to test?
- If it were possible, do you think your company would pay for a helmet to be SHARP tested were it not selected for test?

### **Consumers**

- How much do you think SHARP ratings affect *your* sales of motorcycle helmets in the UK?
  - How does a SHARP rating affect orders of a helmet from distributors in the UK?
  - How much do you think SHARP ratings affect sales of helmets across the market in the UK?
- How valuable do you think SHARP ratings are for consumers in the UK when deciding which helmet to purchase?
- Do you think the star rating gives the consumer enough information?
- Do you think the SHARP helmet safety scheme could be made more desirable for:
  - Manufacturers? If yes, how?
  - Distributors? If yes, how?
  - Consumers? If yes, how?
- Do you think that the SHARP helmet safety scheme should be mandatory for all helmets? Why do you say that?

***[Thank and close]***

## Appendix 7: Task 2 CATI survey (Distributors)

### Aim

**[For researcher only]**

**The aim of this task is to explore the effects of SHARP ratings on helmet distributors' marketing strategies.**

### Introduction and consent

Good morning/afternoon/evening my name is \_\_\_\_\_. I work for an independent research company and wondered if I could have 10 minutes of your time to discuss your use of the SHARP motorcycle helmet safety rating scheme in the marketing of motorcycle helmets?

This isn't a sales call, we're looking to speak with people within your industry today to seek feedback on the SHARP rating system, even if you do not currently have SHARP-rated products or use the SHARP ratings in your marketing.

This interview is being conducted in accordance with the Market Research Society Code of Conduct and all responses you give will remain confidential and anonymous and you won't receive any marketing material as a result of this interview.

Are you happy to continue?

### About you and your company (~2 mins)

- Which of these general areas of work best describe your role?
  - Marketing
  - Management
  - Research and testing
  - Product design
  - Distribution
  - Other (Please specify\_\_\_\_\_)
- How long have you worked for the company?

**[Select one only]**

  - <1 year
  - >1 to <5 years
  - >5 to <10 years
  - >10 years
- How long has your company been involved in the distribution of motorcycle helmets?

**[Select one only]**

  - <1 years
  - >1 to <5 years
  - >5 to <10 years
  - >10 years

- What are the top selling brands of motorcycle helmet that your company distributes (name up to 5)?

**[Public Knowledge to back-code to this list]**

- |                                       |   |                                 |                                    |
|---------------------------------------|---|---------------------------------|------------------------------------|
| <input type="radio"/> AGV             | <input type="radio"/> Airoh                       | <input type="radio"/> Arai      | <input type="radio"/> Arashi       |
| <input type="radio"/> Bell            | <input type="radio"/> BKS                         | <input type="radio"/> BMW       | <input type="radio"/> BOX          |
| <input type="radio"/> Buell           | <input type="radio"/> Bultaco                     | <input type="radio"/> Caberg    | <input type="radio"/> CMS          |
| <input type="radio"/> Dainese         | <input type="radio"/> Diesel                      | <input type="radio"/> Duchinni  | <input type="radio"/> Frank Thomas |
| <input type="radio"/> Fusion          | <input type="radio"/> G-Mac                       | <input type="radio"/> Givi      | <input type="radio"/> Grex         |
| <input type="radio"/> Harley-Davidson | <input type="radio"/> HJC                         | <input type="radio"/> Icon      | <input type="radio"/> Kabuto       |
| <input type="radio"/> Kawasaki        | <input type="radio"/> KBC                         | <input type="radio"/> Lazer     | <input type="radio"/> LEM          |
| <input type="radio"/> LS2             | <input type="radio"/> Marushin                    | <input type="radio"/> MDS       | <input type="radio"/> MT           |
| <input type="radio"/> Nankai          | <input type="radio"/> Nexx                        | <input type="radio"/> Nitro     | <input type="radio"/> Nolan        |
| <input type="radio"/> Nuvo            | <input type="radio"/> NZI                         | <input type="radio"/> Osbe      | <input type="radio"/> Premier      |
| <input type="radio"/> Roof            | <input type="radio"/> RST                         | <input type="radio"/> Schuberth | <input type="radio"/> Scorpion     |
| <input type="radio"/> Shark           | <input type="radio"/> Shoei                       | <input type="radio"/> Shox      | <input type="radio"/> Spada        |
| <input type="radio"/> Sparx           | <input type="radio"/> Suomy                       | <input type="radio"/> Takachi   | <input type="radio"/> Urban        |
| <input type="radio"/> Uvex            | <input type="radio"/> V-Can                       | <input type="radio"/> Vemar     | <input type="radio"/> Viper        |
| <input type="radio"/> X-Lite          | <input type="radio"/> Other(s) (Please note_____) |                                 |                                    |

### Marketing (~3 mins)

- On a scale of 1 to 10, where 1 is 'Not at all important' and 10 is 'Extremely important', how important is the following information from **manufacturers** when deciding which helmets to distribute in the UK?

**[Select one response in each row]**

|   | Not at all important |   |   |   |   |   |   |   |   |    | Extremely important |
|---|----------------------|---|---|---|---|---|---|---|---|----|---------------------|
| Helmet type   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Helmet style  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Features  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Brand   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Helmet name   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Comfort   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Aerodynamics  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Noise   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Features  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Safety standards (e.g. British Standard Kite mark)      | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Safety ratings (e.g. safety ratings schemes like SHARP) | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Price   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| Other   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| (Please specify_____)                                   |                      |   |   |   |   |   |   |   |   |    |                     |

- What marketing media do you look at when selecting helmets to distribute?

**[Allow spontaneous response, select all items mentioned by participant]**

- Packaging
- Point-of-sale displays
- Show stands
- Sports endorsement
- Newspapers and Magazines
- Online advertising
- Social media
- TV
- Other (Please specify\_\_\_\_\_)
- Other (Please specify\_\_\_\_\_)
- Other (Please specify\_\_\_\_\_)

- Do you sell motorcycle helmets directly to the public in the UK?

**[Select one only]**

- Yes
- No **[Skip to Q□]**

- On a scale of 1 to 10, where 1 is 'Not at all important' and 10 is 'Extremely important', how important is the following information for encouraging **consumers** to purchase your helmets in the UK?

**[Select one response in each row]**

|   | Not at all important |   |   |   |   |   |   |   | Extremely important |    |
|---|----------------------|---|---|---|---|---|---|---|---------------------|----|
|   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Helmet type   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Helmet style  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Features  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Brand   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Helmet name   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Comfort   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Aerodynamics  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Noise   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Features  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Safety standards (e.g. British Standard Kite mark)      | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Safety ratings (e.g. safety ratings schemes like SHARP) | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Price   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| Other   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                   | 10 |
| (Please specify_____)                                   |                      |   |   |   |   |   |   |   |                     |    |

- What marketing media do you use to encourage **consumer** to purchase your helmets in the UK?

**[Allow spontaneous response, select all items mentioned by participant]**

- Packaging
- Point-of-sale displays
- Show stands
- Sports endorsement
- Newspapers and Magazines
- Online advertising
- Social media
- TV
- Other (Please specify\_\_\_\_\_)
- Other (Please specify\_\_\_\_\_)
- Other (Please specify\_\_\_\_\_)

- What safety standards or ratings schemes do you market when distributing your helmets?

**[Read each item]**

|                                   | Yes                      | No                       | Don't know               |
|-----------------------------------|--------------------------|--------------------------|--------------------------|
| British Standard (Kite mark)      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| UN 'E' Mark (ECER22-05)           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| US DOT                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| SHARP helmet safety rating scheme | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| American standard – Snell         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ACU Gold sticker                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Other (specify) _____             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- On a scale from 1 to 10, where 1 is 'Not at all popular' and 10 is 'Extremely popular', please rate the popularity of the following helmet styles in the UK at the moment?

**[Select one response in each row]**

|                    | Not at all popular |   |   |   |   |   |   |   |   |    | Extremely popular |  |  |  |  |  |  |  |  |  |
|--------------------|--------------------|---|---|---|---|---|---|---|---|----|-------------------|--|--|--|--|--|--|--|--|--|
| Touring            | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |  |  |  |  |  |  |  |  |  |
| Sport              | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |  |  |  |  |  |  |  |  |  |
| Dirt/Motocross     | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |  |  |  |  |  |  |  |  |  |
| Modular/Flip-front | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |  |  |  |  |  |  |  |  |  |
| Open face          | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |  |  |  |  |  |  |  |  |  |

|                        | Not at all popular |   |   |   |   |   |   |   | Extremely popular |    |
|------------------------|--------------------|---|---|---|---|---|---|---|-------------------|----|
| Scooter                | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| Other                  | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9                 | 10 |
| (Please specify _____) |                    |   |   |   |   |   |   |   |                   |    |

### SHARP ratings (~5 mins)

- Are you aware of the SHARP helmet safety rating scheme?
  - Yes **[Go to Q□]**
  - No **[Read SHARP information]**

The SHARP helmet safety scheme came into being in 2007, after the Department for Transport found differences in the safety performance of motorcycle helmets available in the UK. While all helmets have to meet minimum safety standards, research showed that up to 50 lives could be saved each year if motorcyclists wore the safest helmets available to them.

Taking the best bits from current standards around the world, SHARP puts motorcycle helmets through a more rigorous and targeted testing process.

Thanks to a simple five star scoring system, SHARP provides motorcyclists with independent and objective advice, revealing the different safety performances of UK motorcycle helmets.

12b. Do you now recall the SHARP helmet safety rating scheme?

- Yes
- No **[Thank & Close]**
- Of the helmets you distribute in the UK, approximately what percentage have been SHARP tested?

**[Select one only]**

- None **[Skip to Q□]**
- 10%
- 20%
- 30%
- 40%
- 50%
- 60%
- 70%
- 80%
- 90%
- All

- What is the *lowest* SHARP rating for any of the helmets that you distribute?

**[Select one only]**

- ☐ 1 Star
- ☐ 2 Stars
- ☐ 3 Stars
- ☐ 4 Stars
- ☐ 5 Stars
- ☐ Don't know

- What is the *highest* SHARP rating for any of the helmets that you distribute?

**[Select one only]**

- ☐ 1 Star
- ☐ 2 Stars
- ☐ 3 Stars
- ☐ 4 Stars
- ☐ 5 Stars
- ☐ Don't know

- Where would you market a SHARP test rating for a **1 Star** helmet?

**[Read out list and select all that apply]**

- ☐ On the helmet
- ☐ On packaging
- ☐ On point-of-sale displays
- ☐ On show stands
- ☐ In newspapers and magazine advertisements
- ☐ In online advertisements
- ☐ On your website
- ☐ On social media
- ☐ In TV advertising
- ☐ Other (Please specify \_\_\_\_\_)

OR

- ☐ We would not advertise this SHARP rating

- Where would you market the SHARP test rating for a **3 Star** helmet?

**[Read out list and select all that apply]**

- ☐ On the helmet
- ☐ On packaging
- ☐ On point-of-sale displays
- ☐ On show stands
- ☐ In newspapers and magazine advertisements
- ☐ In online advertisements

- On your website
- On social media
- In TV advertising
- Other (Please specify\_\_\_\_\_)

OR

- We would not advertise this SHARP rating

- Where would you market the SHARP test rating for a **5 Star helmet**?

***[Read out list and select all that apply]***

- On the helmet
- On packaging
- On point-of-sale displays
- On show stands
- In newspapers and magazine advertisements
- In online advertisements
- On your website
- On social media
- In TV advertising
- Other (Please specify\_\_\_\_\_)

OR

- We would not advertise this SHARP rating

- Do you think the SHARP star rating gives the consumer enough information?

***[Select one only]***

- Yes
- No
- Don't know

- Have you ever recommended that a company request for a helmet to be SHARP tested?

***[Select one only]***

- Yes
- No
- Don't know

- Do you think manufacturers should have more say in which helmets get tested?

***[Select one only]***

- Yes
- No
- Don't know



- If it were possible, do you think companies would pay for a helmet to be SHARP tested were it not selected for test?

**[Select one only]**

- ☐ Yes
 ☐ No
 ☐ Don't know
- On a scale of 1 to 5 where 1 is 'Very important' and 5 is 'Not at all important', how important do you think SHARP ratings are to *your* sales of motorcycle helmets in the UK?

**[Select one only]**

| Very important | Quite important | Neither/<br>nor | Quite unimportant | Not at all important |
|----------------|-----------------|-----------------|-------------------|----------------------|
| 1              | 2               | 3               | 4                 | 5                    |

- On the same 1 to 5 scale where 1 is 'Very important' and 5 is 'Not at all important', how important is a SHARP rating to you when ordering a helmet for sale in the UK from manufacturers?

**[Select one only]**

| Very important | Quite important | Neither/<br>nor | Quite unimportant | Not at all important |
|----------------|-----------------|-----------------|-------------------|----------------------|
| 1              | 2               | 3               | 4                 | 5                    |

- And again, on the same 1 to 5 scale where 1 is 'Very important' and 5 is 'Not at all important', how important do you think SHARP ratings are for consumers in the UK when deciding which helmet to purchase?

**[Select one only]**

| Very important | Quite important | Neither/<br>nor | Quite unimportant | Not at all important |
|----------------|-----------------|-----------------|-------------------|----------------------|
| 1              | 2               | 3               | 4                 | 5                    |

- Do you think it should be mandatory for all helmets on sale in the UK to be included in the SHARP helmet safety scheme?

**[Select one only]**

- ☐ Yes
 ☐ No
 ☐ Don't know

#### END

Thank you very much for taking the time to participate in this survey, you will not be contacted by any third parties or receive any marketing material as a result of this survey.

This survey has been conducted in accordance with the MRS Code of Conduct and all of your answers will remain confidential.

## Appendix 8: Task 2 CATI Survey (Retailers and dealers)

### Aim

***[For researcher only]***

**The aim of this task is to explore the effects of SHARP ratings on helmet manufacturers' and distributors' marketing strategies. This has been extended to understand how it might impact on retailers and dealers.**

### Introduction and consent

Good morning/afternoon/evening my name is\_\_\_\_\_. I work for an independent research company and wondered if I could have 10 minutes of your time to discuss your use of the SHARP motorcycle helmet safety rating scheme in the marketing of motorcycle helmets?

This isn't a sales call, we're looking to speak with people within your industry today to seek feedback on the SHARP rating system, even if you do not currently have SHARP-rated products or use the SHARP ratings in your marketing.

This interview is being conducted in accordance with the Market Research Society Code of Conduct and all responses you give will remain confidential and anonymous and you won't receive any marketing material as a result of this interview.

Are you happy to continue?

### About you and your company (~2 mins)

- Which of these general areas of work best describe your role?
  - Dealer
  - Retailer
  - Other (Please specify\_\_\_\_\_)
- How long have you worked for the company?

***[Select one only]***

- <1 year
  - >1 to <5 years
  - >5 to <10 years
  - >10 years
- How long has your company been involved in retailing motorcycle helmets?

***[Select one only]***

- <1 years
  - >1 to <5 years
  - >5 to <10 years
  - >10 years

- What are the top selling brands of motorcycle helmet that your company retails (name up to 5)?

**[Public Knowledge to back-code to this list]**

- |                                       |   |                                 |                                    |
|---------------------------------------|---|---------------------------------|------------------------------------|
| <input type="radio"/> AGV             | <input type="radio"/> Airoh                       | <input type="radio"/> Arai      | <input type="radio"/> Arashi       |
| <input type="radio"/> Bell            | <input type="radio"/> BKS                         | <input type="radio"/> BMW       | <input type="radio"/> BOX          |
| <input type="radio"/> Buell           | <input type="radio"/> Bultaco                     | <input type="radio"/> Caberg    | <input type="radio"/> CMS          |
| <input type="radio"/> Dainese         | <input type="radio"/> Diesel                      | <input type="radio"/> Duchinni  | <input type="radio"/> Frank Thomas |
| <input type="radio"/> Fusion          | <input type="radio"/> G-Mac                       | <input type="radio"/> Givi      | <input type="radio"/> Grex         |
| <input type="radio"/> Harley-Davidson | <input type="radio"/> HJC                         | <input type="radio"/> Icon      | <input type="radio"/> Kabuto       |
| <input type="radio"/> Kawasaki        | <input type="radio"/> KBC                         | <input type="radio"/> Lazer     | <input type="radio"/> LEM          |
| <input type="radio"/> LS2             | <input type="radio"/> Marushin                    | <input type="radio"/> MDS       | <input type="radio"/> MT           |
| <input type="radio"/> Nankai          | <input type="radio"/> Nexx                        | <input type="radio"/> Nitro     | <input type="radio"/> Nolan        |
| <input type="radio"/> Nuvo            | <input type="radio"/> NZI                         | <input type="radio"/> Osbe      | <input type="radio"/> Premier      |
| <input type="radio"/> Roof            | <input type="radio"/> RST                         | <input type="radio"/> Schuberth | <input type="radio"/> Scorpion     |
| <input type="radio"/> Shark           | <input type="radio"/> Shoei                       | <input type="radio"/> Shox      | <input type="radio"/> Spada        |
| <input type="radio"/> Sparx           | <input type="radio"/> Suomy                       | <input type="radio"/> Takachi   | <input type="radio"/> Urban        |
| <input type="radio"/> Uvex            | <input type="radio"/> V-Can                       | <input type="radio"/> Vemar     | <input type="radio"/> Viper        |
| <input type="radio"/> X-Lite          | <input type="radio"/> Other(s) (Please note_____) |                                 |                                    |

### Marketing (~3 mins)

- On a scale of 1 to 10, where 1 is 'Not at all important' and 10 is 'Extremely important', how important is the following information from **manufacturers or distributors** when deciding which helmets to retail in the UK?

**[Select one response in each row]**

|   | Not at all important |   |   |   |   | Extremely important |   |   |   |    |
|---|----------------------|---|---|---|---|---------------------|---|---|---|----|
| Helmet type   | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Helmet style  | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Features  | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Brand   | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Helmet name   | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Comfort   | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Aerodynamics  | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Noise   | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Features  | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Safety standards (e.g. British Standard Kite mark)      | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Safety ratings (e.g. safety ratings schemes like SHARP) | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Price   | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |
| Other<br>(Please specify_____)                          | 1                    | 2 | 3 | 4 | 5 | 6                   | 7 | 8 | 9 | 10 |

- What marketing media do you look at when selecting helmets to sell?

**[Allow spontaneous response, select all items mentioned by participant]**

- Packaging
  - Point-of-sale displays
  - Show stands
  - Sports endorsement
  - Newspapers and Magazines
  - Online advertising
  - Social media
  - TV
  - Other (Please specify\_\_\_\_\_)
  - Other (Please specify\_\_\_\_\_)
  - Other (Please specify\_\_\_\_\_)
- On a scale of 1 to 10, where 1 is 'Not at all important' and 10 is 'Extremely important', how important is the following information for encouraging **consumers** to purchase helmets in the UK? **[Select one response in each row]**

|  | Not at all important |   |   |   |   |   |   |   |   |    | Extremely important |
|--|----------------------|---|---|---|---|---|---|---|---|----|---------------------|
| <b>Helmet type</b>   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Helmet style</b>  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Features</b>  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Brand</b>   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Helmet name</b>   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Comfort</b>   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Aerodynamics</b>  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Noise</b>   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Features</b>  | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Safety standards (e.g. British Standard Kite mark)</b>      | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Safety ratings (e.g. safety ratings schemes like SHARP)</b> | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Price</b>   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |
| <b>Other</b><br><b>(Please specify_____)</b>                   | 1                    | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                     |

- What marketing media do you use to encourage **consumers** to purchase your helmets in the UK?

**[Allow spontaneous response, select all items mentioned by participant]**

- Packaging
- Point-of-sale displays

- Show stands
  - Sports endorsement
  - Newspapers and Magazines
  - Online advertising
  - Social media
  - TV
  - Other (Please specify\_\_\_\_\_)
  - Other (Please specify\_\_\_\_\_)
  - Other (Please specify\_\_\_\_\_)
- What safety standards or ratings schemes do you market when retailing your helmets?

**[Read each item]**

|  | Yes                      | No                       | Don't know               |
|--|--------------------------|--------------------------|--------------------------|
| <b>British Standard (Kite mark)</b>      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>UN 'E' Mark (ECER22-05)</b>           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>US DOT</b>                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>SHARP helmet safety rating scheme</b> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>American standard – Snell</b>         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>ACU Gold sticker</b>                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Other (specify) _____</b>             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- On a scale from 1 to 10, where 1 is 'Not at all popular' and 10 is 'Extremely popular', please rate the popularity of the following helmet styles in the UK at the moment?

**[Select one response in each row]**

|                                     | Not at all popular |   |   |   |   |   |   |   |   |    | Extremely popular |
|-------------------------------------|--------------------|---|---|---|---|---|---|---|---|----|-------------------|
| <b>Touring</b>                      | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |
| <b>Sport</b>                        | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |
| <b>Dirt/Motocross</b>               | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |
| <b>Modular/Flip-front</b>           | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |
| <b>Open face</b>                    | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |
| <b>Scooter</b>                      | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |
| <b>Other (Please specify _____)</b> | 1                  | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |                   |

## SHARP ratings (~5 mins)

- Are you aware of the SHARP helmet safety rating scheme?
  - Yes **[Go to Q□]**
  - No **[Read SHARP information]**

The SHARP helmet safety scheme came into being in 2007, after the Department for Transport found differences in the safety performance of motorcycle helmets available in the UK. While all helmets have to meet minimum safety standards, research showed that up to 50 lives could be saved each year if motorcyclists wore the safest helmets available to them.

Taking the best bits from current standards around the world, SHARP puts motorcycle helmets through a more rigorous and targeted testing process.

Thanks to a simple five star scoring system, SHARP provides motorcyclists with independent and objective advice, revealing the different safety performances of UK motorcycle helmets.

12b. Do you now recall the SHARP helmet safety rating scheme?

- Yes
  - No **[Thank & Close]**
- Of the helmets you retail in the UK, approximately what percentage have been SHARP tested?

**[Select one only]**

- None **[Skip to Q□]**
  - 10%
  - 20%
  - 30%
  - 40%
  - 50%
  - 60%
  - 70%
  - 80%
  - 90%
  - All
- What is the *lowest* SHARP rating for any of the helmets that you retail?
- [Select one only]**
- 1 Star
  - 2 Stars
  - 3 Stars
  - 4 Stars
  - 5 Stars
  - Don't know

- What is the *highest* SHARP rating for any of the helmets that you retail?

**[Select one only]**

- 1 Star
  - 2 Stars
  - 3 Stars
  - 4 Stars
  - 5 Stars
  - Don't know
- Where would you market a SHARP test rating for a **1 Star** helmet?

**[Read out list and select all that apply]**

- On the helmet
  - On packaging
  - On point-of-sale displays
  - On show stands
  - In newspapers and magazine advertisements
  - In online advertisements
  - On your website
  - On social media
  - In TV advertising
  - Other (Please specify\_\_\_\_\_)
- OR
- We would not advertise this SHARP rating
- Where would you market the SHARP test rating for a **3 Star** helmet?

**[Read out list and select all that apply]**

- On the helmet
  - On packaging
  - On point-of-sale displays
  - On show stands
  - In newspapers and magazine advertisements
  - In online advertisements
  - On your website
  - On social media
  - In TV advertising
  - Other (Please specify\_\_\_\_\_)
- OR
- We would not advertise this SHARP rating

- Where would you market the SHARP test rating for a **5 Star** helmet?

**[Read out list and select all that apply]**

- On the helmet
- On packaging
- On point-of-sale displays
- On show stands
- In newspapers and magazine advertisements
- In online advertisements
- On your website
- On social media
- In TV advertising
- Other (Please specify \_\_\_\_\_)

OR

- We would not advertise this SHARP rating

- Do you think the SHARP star rating gives the consumer enough information?

**[Select one only]**

- Yes
- No
- Don't know

- Have you ever recommended that a company request for a helmet to be SHARP tested?

**[Select one only]**

- Yes
- No
- Don't know

- Do you think manufacturers should have more say in which helmets get tested?

**[Select one only]**

- Yes
- No
- Don't know

- If it were possible, do you think companies would pay for a helmet to be SHARP tested were it not selected for test?

**[Select one only]**

- Yes
- No
- Don't know



- On a scale of 1 to 5 where 1 is 'Very important' and 5 is 'Not at all important', how important do you think SHARP ratings are to sales of motorcycle helmets in the UK?

**[Select one only]**

| <b>Very important</b> | <b>Quite important</b> | <b>Neither/<br/>nor</b> | <b>Quite unimportant</b> | <b>Not at all important</b> |
|-----------------------|------------------------|-------------------------|--------------------------|-----------------------------|
| 1                     | 2                      | 3                       | 4                        | 5                           |

- On the same 1 to 5 scale where 1 is 'Very important' and 5 is 'Not at all important', how important is a SHARP rating to you when ordering a helmet to sell in the UK from manufacturers or distributors?

**[Select one only]**

| <b>Very important</b> | <b>Quite important</b> | <b>Neither/<br/>nor</b> | <b>Quite unimportant</b> | <b>Not at all important</b> |
|-----------------------|------------------------|-------------------------|--------------------------|-----------------------------|
| 1                     | 2                      | 3                       | 4                        | 5                           |

- And again, on the same 1 to 5 scale where 1 is 'Very important' and 5 is 'Not at all important', how important do you think SHARP ratings are for consumers in the UK when deciding which helmet to purchase?

**[Select one only]**

| <b>Very important</b> | <b>Quite important</b> | <b>Neither/<br/>nor</b> | <b>Quite unimportant</b> | <b>Not at all important</b> |
|-----------------------|------------------------|-------------------------|--------------------------|-----------------------------|
| 1                     | 2                      | 3                       | 4                        | 5                           |

- Do you think it should be mandatory for all helmets on sale in the UK to be included in the SHARP helmet safety scheme?

**[Select one only]**

- ☐ Yes
- ☐ No
- ☐ Don't know

#### **END**

Thank you very much for taking the time to participate in this survey, you will not be contacted by any third parties or receive any marketing material as a result of this survey.

This survey has been conducted in accordance with the MRS Code of Conduct and all of your answers will remain confidential.

## Appendix 9: Task 3 Consumer survey

Hosted online

### Qualifying questions

QA. Do you ride a motorcycle (including mopeds) on public roads?

**SELECT ONE BOX ONLY**

Yes ☐ **[Next question]**

No ☐ **[Thank and close]**

QB. In what year did you purchase your most recent motorcycle helmet?

**[drop down box]**

Pre-2000

2001

2002

2003...through to...

...2015

**[Advance those who answer 2007 on]**

**[Thank and close those who answer Pre-2000 up to and including 2006]**

### INTRODUCTION

- Good morning/afternoon/evening
- Thank you for agreeing to take part in this survey.
- This research is being conducted by Public Knowledge and TRL on behalf of the Department for Transport.
- The aim of the survey is to understand more about motorcyclists' decision making when purchasing a helmet.
- To do this we will ask you some background questions about you and motorcycling as well as about your most recent motorcycle helmet purchase.
- There are no right or wrong answers, we are looking for your honest views and opinions.
- The questionnaire should take around 10 minutes to complete.
- On completion of the questionnaire you will be given the opportunity to enter a prize draw to win £100.
- All responses will remain strictly confidential and anonymous and dealt with in accordance with the Market Research Society Code of Conduct.
- It will not be possible to identify you from your responses.

- Please note that the term 'motorcycle' is used throughout the questionnaire to include motorcycles, mopeds, scooters and other similar vehicles that require the wearing of a helmet when ridden on public roads.

## YOU, YOUR MOTORCYCLE AND RIDING EXPERIENCE

Please tell us a little about you, your motorcycle and riding experience

1. Do you own a motorcycle of which you are the main rider?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐

2. Roughly, how long have you been riding motorcycles on public roads for?  
(Do NOT include long periods when you never rode)

**[drop down options]**

\_\_\_\_\_ years      \_\_\_\_\_ months

3. Between the time you first started riding motorcycles and now, have you have a break from riding motorcycles on public roads of more than one year (i.e. were there any long periods of time (more than one year) when you did not ride a motorcycle)?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐

4. What is the engine size of the bike you ride most often on public roads?

**SELECT ONE BOX ONLY**

Up to 125cc ☐

126-500cc ☐

501-750cc ☐

751-900cc ☐

901-1500cc ☐

Over 1501cc ☐

5. Which of the following best describes the type of bike that you ride most often?

**SELECT ONE BOX ONLY**

Sports Motorcycle ☐

Sports-Touring Motorcycle ☐

Super moto Motorcycle ☐

- Touring Motorcycle ☐
- Commuting/Roadster ☐
- Off road/Trials Motorcycle ☐
- Custom Motorcycle ☐
- Classic Motorcycle ☐
- Adventure Motorcycle ☐
- Retro Motorcycle ☐
- Moped ☐
- Scooter ☐
- Other (please specify) \_\_\_\_\_ ☐

6. Roughly, how old is this bike?

**SELECT ONE BOX ONLY**

- Less than 1 year ☐
- More than 1 but less than 3 years ☐
- More than 3 but less than 5 years ☐
- More than 5 but less than 10 years ☐
- 10 or more years ☐

7. Do you have access to any other bikes in your household?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐ Skip to Q9

8. In total, how many bikes do you have access to in your household?

**[drop down option 2 through to 5+]**

\_\_\_\_\_ bikes

9. Approximately, what is your average annual mileage on all the bikes you have access to in your household?

|  |  |  |  |  |  |
|--|--|--|--|--|--|
|  |  |  |  |  |  |
|--|--|--|--|--|--|

MILES

10. Do you hold a provisional or full bike licence?

**SELECT ONE BOX ONLY**

- Provisional ..... ☐
- Full AM (Moped) ..... ☐
- Full A1 (minimum age 17, motorcycles up to 125cc, maximum power 15kW) ☐
- Full A2 (minimum age 19, maximum power 35kW) ..... ☐
- Full A (unrestricted, min age 24 for direct access, 21 with progressive access) ☐

11. Do you also hold any type of car driving licence? If so which?

**SELECT ONE BOX ONLY**

- Full ..... ☐
- Provisional ..... ☐ Skip to Q14
- None ..... ☐ Skip to Q14

12. Have you undertaken any additional motorcycle training other than that required to get your motorcycle licence?

**SELECT ONE BOX ONLY**

- Yes ..... ☐
- No ..... ☐

13. Please tick all relevant boxes below to indicate when and why you ride your motorcycle?

**Please select one option in each row**

|                                     | <b>All year round</b>    | <b>Summer or fair weather only</b> | <b>N/A</b>               |
|-------------------------------------|--------------------------|------------------------------------|--------------------------|
| As part of my job                   | <input type="checkbox"/> | <input type="checkbox"/>           | <input type="checkbox"/> |
| Commuting to work/college/school    | <input type="checkbox"/> |                                    |                          |
| To get to places in my leisure time | <input type="checkbox"/> |                                    |                          |
| For the fun of it                   | <input type="checkbox"/> | <input type="checkbox"/>           | <input type="checkbox"/> |

14. In general in what type of area do you ride most often?

**SELECT ONE BOX ONLY**

- Urban (e.g. in and around towns and cities) ..... ☐
- Rural (e.g. country roads) ..... ☐
- Both equally ..... ☐

15. Have you experienced any of the following in the last 3 years?

**SELECT ALL THAT APPLY**

- Fallen off your motorcycle ..... ☐
- Had a motorcycle accident requiring medical treatment ..... ☐
- Had an head injury from a motorcycle accident ..... ☐
- Know somebody who had a bike accident involving a head injury of any severity ☐
- Know somebody who had a bike accident involving any type of serious injury or death ..... ☐
- Fined for speeding on your bike ..... ☐
- Convicted for any other riding offence ..... ☐
- Ridden when tired ..... ☐

## YOUR VIEWS OF MOTORCYCLING

The following question will ask you to rate your agreement with a list of statements about motorcycling so that we can understand what is important to you as a motorcyclist.

16. On a scale of 1-5 where 1 equals 'Very important' and 5 equals 'Not important at all' please indicate the importance of the following to you as a motorcyclist:

**SELECT ONE RESPONSE ONLY FOR EACH STATEMENT**

| <b>[RANDOMISE ORDER]</b>                                    | <b>Very important</b>    | <b>Quite important</b> | <b>Neither / nor</b> | <b>Quite unimportant</b> | <b>Not at all important</b> |
|---|--------------------------|------------------------|----------------------|--------------------------|-----------------------------|
| Not having to rely on others/public transport to get around | <input type="checkbox"/> |                        |                      |                          |                             |
| Being able to get to places quicker                         | <input type="checkbox"/> |                        |                      |                          |                             |
| Getting away from everyday life                             | <input type="checkbox"/> |                        |                      |                          |                             |
| Having much more power than in a car of the same price      | <input type="checkbox"/> |                        |                      |                          |                             |

| <b>[RANDOMISE ORDER]</b>                             | <b>Very important</b>    | <b>Quite important</b>   | <b>Neither / nor</b>     | <b>Quite unimportant</b> | <b>Not at all important</b> |
|--|--------------------------|--------------------------|--------------------------|--------------------------|-----------------------------|
| Feedback from the bike including noise and vibration | <input type="checkbox"/> |                          |                          |                          |                             |
| Feeling the wind rushing past you                    | <input type="checkbox"/> |                          |                          |                          |                             |
| Pitting myself against others                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| The fact I look good on the bike                     | <input type="checkbox"/> |                          |                          |                          |                             |
| A sense of heritage or tradition                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>    |
| A sense of belonging and camaraderie                 | <input type="checkbox"/> |                          |                          |                          |                             |

## MOTORCYCLE HELMETS

**We would like to ask you a few questions about the last motorcycle helmet you purchased.**

17. How many motorcycle helmets do you currently own?

**[drop down option 1 through to 5+]**

\_\_\_\_\_ helmet(s)

18. Did you purchase your most recent motorcycle helmet new or second-hand?

**SELECT ONE BOX ONLY**

New ..... ☐

Second-hand..... ☐

19. Where did you buy your most recent motorcycle helmet from?

**SELECT ONE BOX ONLY**

Motorbike dealer..... ☐

Motorcycle equipment shop... ☐

Online - direct from manufacturer... ☐

Online – motorcycle shop.....

Online – other ..... ☐

Private advertisement (e.g. Gumtree) ☐

Friend/family..... ☐

Came with bike ..... ☐

Other (Please specify) ☐

20. What type of motorcycle helmet is the one you most recently purchased?

**SELECT ONE BOX ONLY**

Full face ..... ☐

Open face ..... ☐

Flip front ..... ☐

21. How important were the following factors when choosing your most recent motorcycle helmet?

**SELECT ONE RESPONSE ONLY FOR EACH FACTOR**

| <b>[RANDOMISE ORDER]</b>                | <b>Very<br/>important</b> | <b>Quite<br/>important</b> | <b>Neither<br/>/ nor</b> | <b>Quite<br/>unimportant</b> | <b>Not at all<br/>important</b> |
|---|---------------------------|----------------------------|--------------------------|------------------------------|---------------------------------|
| Comfort/fit                             | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Looks/appearance                        | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Safety/protection certification         | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Reputation of manufacturer/<br>brand    | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Recommendation from<br>trusted source   | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Meets minimum safety<br>standards       | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Noise                                   | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Ventilation/anti-misting                | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Added features (e.g. in-built<br>radio) | <input type="checkbox"/>  |                            |                          |                              |                                 |
| Price                                   | <input type="checkbox"/>  |                            |                          |                              |                                 |



22. What other types of motorcycle protective clothing do you own and wear most of the time when you ride?

**SELECT ALL THAT APPLY**

|                          |                          |
|--------------------------|--------------------------|
| Motorcycle jacket        | <input type="checkbox"/> |
| Motorcycle trousers      | <input type="checkbox"/> |
| Motorcycle suit          | <input type="checkbox"/> |
| Body armour              | <input type="checkbox"/> |
| Motorcycle boots         | <input type="checkbox"/> |
| Motorcycle gloves        | <input type="checkbox"/> |
| High visibility clothing | <input type="checkbox"/> |
| Other                    | <input type="checkbox"/> |
| None of the above        | <input type="checkbox"/> |

**We would like to ask you about motorcycle helmet safety in more detail.**

23. Are you aware of the SHARP helmet safety scheme?

**[INCLUDE LOGO ON SCREEN]**



**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐ Skip to Q35

24. Has your most recent helmet been SHARP tested?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐ Skip to Q29

Don't know ..... ☐ Skip to Q29

25. How many stars did it get?

**[drop down options 1 through to 5, or don't know]**

\_\_\_\_\_ stars

26. How did you first find out that your helmet had been SHARP tested?

**SELECT ONE BOX ONLY**

- The sales person told me ..... ☐
- It was advertised by the manufacturer ..... ☐
- It was advertised by the place I bought it from ..... ☐
- It was on the helmet ..... ☐
- I read it in a review ..... ☐
- I looked it up on the SHARP website ..... ☐
- I looked it up online (other than the SHARP website) ..... ☐
- A friend or family member told me ..... ☐
- Other (please specify) ..... ☐

27. Were you aware of the SHARP rating before you bought the helmet?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐ Skip to Q29

Don't know ..... ☐ Skip to Q29

28. On the following scale, please rate how important the SHARP rating was for your decision to purchase this helmet?

**SELECT ONE BOX ONLY**

| Not at all<br>important |   | Very<br>important |   |   |
|-------------------------|---|-------------------|---|---|
| 1                       | 2 | 3                 | 4 | 5 |
|                         |   |                   |   |   |

29. Were you aware of other helmets having a SHARP rating when you purchased your helmet?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐

Don't know ..... ☐

30. Did you visit the SHARP helmet safety scheme website when you were looking for your helmet?



**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐ Skip to Q32

Don't know ..... ☐ Skip to Q32

31. On the following scale, please rate how useful you found the SHARP website?

**SELECT ONE BOX ONLY**

| Not useful at all |   | Very useful |   |   |
|-------------------|---|-------------|---|---|
| 1                 | 2 | 3           | 4 | 5 |
|                   |   |             |   |   |

32. Were you given a SHARP pocket information guide (like the one pictured) when you were looking for a new helmet?

**Helping you choose the right helmet**

**WHAT SHOULD YOU LOOK FOR IN A HELMET?**  
Fit, Comfort and Safety.  
Helmets (and heads) come in different shapes and sizes so take time to find the right one for you.  
Try on different helmets and from those that fit correctly and are comfortable, consider selecting one with a high SHARP safety (star) rating. Whichever your budget, you should be able to find one with a high rating.  
This guide will help you choose the right helmet for you but remember, in the first instance it needs to fit correctly – if it doesn't, it could come off in an accident even if the other steps are followed.

**1. GET YOUR HEAD MEASURED**  
Before you try any helmet on, get your head measured around the fullest part (just above the ears).  
This measurement will correspond to a particular size in a model range.  
2. TRY IT ON  
When you have your size, place it firmly on your head and adjust the chin strap so that you can fit two fingers between it and your jaw. It there is a quick release buckle, take time to adjust the strap. You should be able to feel the inside of the helmet against all parts of your head, without feeling pressure points or it leaving red marks.  
3. IS IT TOO TIGHT OR TOO LOOSE?  
With the strap secured, try rotating the helmet from side to side. With full face models your cheeks should follow the movement of the helmet and stay in contact with the cheek pads. The helmet should not rotate on your head.

**WHAT IS SHARP?**  
SHARP is the Safety Helmet Assessment and Rating Programme.  
By law all helmets must meet minimum safety standards but SHARP goes beyond these basic requirements to provide an independent assessment of how well a helmet performs over and above the minimum legal requirements.  
SHARP awards a safety rating of 1 to 5 stars – those with 5 offer the highest level of protection.  
However, no matter what its safety rating might be, a helmet must fit the rider correctly, so SHARP provides guidance on selecting one that fits.  
**WHAT RESEARCH UNDERPINS SHARP?**  
SHARP draws from international research that looked at 253 motorcycle road accidents. Replicating accidents in laboratory conditions determined the location, frequency and severity of impacts to helmets.

**WHAT DO THE SHARP TESTS SHOW?**  
By using the findings of this research and using industry standard test equipment and procedures that are established in regulations, SHARP highlights the better performing helmets.

**Safety rating calculations**  
are based on the results of 32 impact tests to a range of locations on at least 7 helmets of the model being rated.  
These results are combined with the probability of injury risk on UK roads of an impact to that location on the helmet. Price is not factored into the calculation.  
**Leish performance (%)**  
scores are calculated from the number of times the facemask remains fully locked (completely shut) after each of the 32 impact tests (i.e. 30/32 = 100% and 9/32 = 28%).  
SHARP is independent – its purpose is to provide motorcyclists with safety information so they can make an informed choice when buying a helmet.  
Helmets are purchased from normal stock at UK motorcycle dealers in a variety of sizes.

**Full Face Helmets**  
List of helmets with SHARP ratings (1-5 stars) and Leish performance (%).  
**System (Flip) Helmets**  
List of helmets with SHARP ratings (1-5 stars) and Leish performance (%).

For the full list of helmet results visit [www.direct.gov.uk/sharp](http://www.direct.gov.uk/sharp)

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐ Skip to Q34

Don't know ..... ☐ Skip to Q34

33. On the following scale, please rate how useful you found the SHARP pocket information guide to be?

**SELECT ONE BOX ONLY**

| Not useful at all |   | Very useful |   |   |
|-------------------|---|-------------|---|---|
| 1                 | 2 | 3           | 4 | 5 |
|                   |   |             |   |   |

34. Please indicate your agreement with the following statements on a scale of 'Strongly agree' to 'Strongly disagree':

**SELECT ONE RESPONSE ONLY FOR EACH STATEMENT**

|  | <b>[PLEASE RANDOMISE ORDER]</b>  | Strongly agree           | Agree                    | Neither agree nor disagree | Disagree                 | Strongly disagree        |
|--|--|--------------------------|--------------------------|----------------------------|--------------------------|--------------------------|
|  | A 1-star helmet does not meet minimum safety standards   | <input type="checkbox"/> |                          |                            |                          |                          |
|  | A 5-star SHARP rated helmet would protect me more than a 3-star SHARP rated helmet if I was in a crash | <input type="checkbox"/> |                          |                            |                          |                          |
|  | SHARP ratings are meaningless  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
|  | Not enough helmets are SHARP tested  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>   | <input type="checkbox"/> | <input type="checkbox"/> |
|  | SHARP ratings should be about more than just safety  | <input type="checkbox"/> |                          |                            |                          |                          |
|  | SHARP tested helmets are safer than non-SHARP tested helmets   | <input type="checkbox"/> |                          |                            |                          |                          |
|  | I would always pay attention to SHARP ratings when buying a helmet                                     | <input type="checkbox"/> |                          |                            |                          |                          |
|  | If all helmets were SHARP tested it would help me choose a safer helmet                                | <input type="checkbox"/> |                          |                            |                          |                          |
|  | A SHARP rating shows that the helmet is good quality   | <input type="checkbox"/> |                          |                            |                          |                          |
|  | SHARP tested helmets will fit better than non-SHARP tested helmets                                     | <input type="checkbox"/> |                          |                            |                          |                          |
|  | I would discuss the SHARP rating of a new helmet with fellow riders                                    | <input type="checkbox"/> |                          |                            |                          |                          |

|  | <b>[PLEASE RANDOMISE ORDER]</b>  | Strongly agree           | Agree | Neither agree nor disagree | Disagree | Strongly disagree |
|--|--|--------------------------|-------|----------------------------|----------|-------------------|
|  | Most riders I know have heard of SHARP helmet ratings                            | <input type="checkbox"/> |       |                            |          |                   |
|  | Only helmets from major brands are SHARP tested                                  | <input type="checkbox"/> |       |                            |          |                   |
|  | Buying a SHARP rated helmet shows you are a responsible rider                    | <input type="checkbox"/> |       |                            |          |                   |
|  | You can tell a SHARP rated helmet by the look of it                              | <input type="checkbox"/> |       |                            |          |                   |
|  | I would feel safer wearing a 5-star SHARP rated helmet                           | <input type="checkbox"/> |       |                            |          |                   |
|  | Buying a SHARP rated helmet shows I care about my safety                         | <input type="checkbox"/> |       |                            |          |                   |
|  | I am more likely to trust a manufacturer if their helmets have been SHARP tested | <input type="checkbox"/> |       |                            |          |                   |
|  | I would feel proud wearing a 5-star SHARP rated helmet                           | <input type="checkbox"/> |       |                            |          |                   |
|  | I would feel uncomfortable wearing a helmet that had not been SHARP tested       | <input type="checkbox"/> |       |                            |          |                   |

35. What helmet safety standards are you aware of?

**SELECT ALL THAT APPLY**

**[Please randomise order]**

- British Standard (Kite mark) ..... ☐
- UN 'E' Mark (ECER22-05) ..... ☐
- US DOT ..... ☐
- American standard - Snell ..... ☐
- ACU Gold sticker ..... ☐
- None ..... ☐
- Other (specify) \_\_\_\_\_

**And finally, please tell us a little more about yourself**

36. What is your gender?

**SELECT ONE BOX ONLY**

Male..... ☐

Female ..... ☐

Prefer not to answer ..... ☐

37. How old were you on your last birthday?

**[drop down box including "Prefer not to answer" at the end]**

\_\_\_\_\_ years

38. What is your marital status and current residential situation?

**SELECT ONE BOX ONLY**

Married/living with partner..... ☐

Separated/divorced/widowed ..... ☐

Single and living with parent(s)/relatives ..... ☐

Single and living in own household ..... ☐

Prefer not to answer ..... ☐

39. Do you have any children?

**SELECT ONE BOX ONLY**

Yes ..... ☐

No ..... ☐

Prefer not to answer ..... ☐

40. What is your employment status? Select the most appropriate answer.

**SELECT ONE BOX ONLY**

Employed ..... ☐

Self-employed..... ☐

Housewife/househusband ..... ☐

Student..... ☐

Retired..... ☐

Without work ..... ☐

Other, Please specify ..... ☐

Prefer not to answer ..... ☐

41. Which of the following income bands does your approximate total **household income** per year fall into, **before taxes**?

**SELECT ONE BOX ONLY**

- Under £10,000.....☐
- £10,001 - £20,000 .....☐
- £20,001 - £30,000 .....☐
- £30,001 - £40,000 .....☐
- £40,001 - £50,000 .....☐
- £50,001 - £60,000 .....☐
- £60,001 - £70,000 .....☐
- £70,001 - £80,000 .....☐
- £80,001 - £90,000 .....☐
- £90,001 - £100,000 .....☐
- £100,000 or more .....☐
- Prefer not to answer .....☐

**THANK AND CLOSE**



## Appendix 10: Task 4 Interview guide (Police)

### Introduction:

I am from The Transport Research Laboratory and we are undertaking this work on behalf of the Department for Transport.

### Purpose:

We are seeking your views regarding SHARP (Safety Helmet and Assessment Rating Programme), and its effect on how motorcyclists decide which helmets to purchase.

### Information:

- Your participation is voluntary
- The Focus Group will last no longer than 2 hours
- There are no right or wrong answers; we just want to hear your views and any information you provide will not be traced back to you in any way.
- With your permission, the focus group will be audio-recorded so that we can refer back to the recording in the future. All recordings will be destroyed when the research has been completed.
- We may choose to use quotes from your focus group, however, you will not be personally identified in any of these

### Introduction (going around the table):

1. Could you please tell me your first name and what your current role is with the police?
  - How long have you been with the police?
2. How long have you been working with motorcycles in the police?
3. Do you also ride for leisure purposes?
  - Do you own a motorcycle for personal use?

### SHARP:

4. What do you know about the SHARP helmet safety rating scheme?
5. How did you first learn about SHARP?

Prompts: where? From who? colleague, the internet (if so, SHARP website?), training
6. Have you ever visited the SHARP website?

Why/ why not?
7. What do you think is the purpose of SHARP?
8. Have you ever made use of SHARP when purchasing helmets either for work or leisure? *[ensure they describe whether work or leisure]*

How do you use it?

Examples: within the organisation (procurement; teaching other motorcyclists), other road users (when policing the roads), education, own/ personal knowledge

If not, why not?

9. Do you find SHARP ratings useful?

Prompts: it helps to open discussions about safety equipment, it useful to help students/ yourself choose the right helmet, ensures safety.

What's useful about SHARP?

What can be done to make it (the ratings) more useful?

10. Do you think it has made a difference in the way helmets are chosen by motorcyclists generally?

Why do you think this?

Thinking about the motorcyclists you engage with, have you seen a difference in relation to the helmets they wear? Or their knowledge of SHARP?

- i. Prompts: can you think of any examples? (where have you seen this, under what circumstances)

Do motorcyclists you engage with tend to know and understand SHARP?

- ii. What do they know about it?

**Police motorcycle training:**

11. Are trainees informed about SHARP as part of the standard training programme?

What information do you provide?

What key elements of helmet purchasing do you discuss with trainees?

Prompts: Helmet type, helmet style, helmet fit, features, brand, name, comfort, aerodynamics, noise, safety

How much time do you tend to spend on this?

Prompts: how much time is spent on training vs. discussions/ training about helmets and SHARP? (5 minutes, 1 hours, daily)

How does it fit in with the training you provide?

If not, why?

**Equipment procurement:**

12. Do police officers who operate on motorcycles choose their own safety equipment? (prompts: helmets, in particular?)

If so, what do trainees seem to prioritise in terms of safety gear? What are they looking for (prompts: looks, brand, features, safety, price?)

How does it vary by (perceived) types of rider? or ages?

If trainees don't select their own equipment, who does?

What safety features/ elements are prioritised?

Prompts: SHARP, other information (internal or external)

Are trainees encouraged to do their own research before safety equipment (particularly helmets) are purchased?

What information sources do they use: internet, internal/ organisational documentation, other national sources, own knowledge

**Collisions:**

What information about helmets do you gather at the scene of collision?

Is it recorded anywhere, or any further enquiries made?.

Is the SHARP rating of a helmet recorded during collision investigations?

How is it used?

If not used, why?

Is it required to prove SHARP rating of helmet?

13. Do you consider there to be any links between helmet types and outcomes (e.g. injury) for riders who have been involved in a crash?

**Improving safety:**

14. In your opinion, is SHARP well known among motorcyclists in general?

15. Who is seen as being responsible for informing the public about helmet safety and SHARP?

Who *should* be responsible for informing the public about helmet safety and SHARP?

- a. How should it be communicated?

Prompts: where responsibilities lie; campaigns, emails, training.

16. What can the police do to improve the general public's knowledge of helmet safety?

What about SHARP ratings specifically?

17. How could the SHARP helmet safety rating scheme be improved?

**Final question:**

Is there any other information we haven't covered (relating to SHARP) that you would like to comment on?

## Appendix 11: Task 4 Interview guide (Road Safety Officers)

### Introduction:

I am from The Transport Research Laboratory and we are undertaking this work on behalf of the Department for Transport.

### Purpose:

We are seeking your views regarding SHARP (Safety Helmet and Assessment Rating Programme), and its effect on how motorcyclists decide which helmets to purchase.

### Information:

- Your participation is voluntary
- Interview will last no longer than 30 minutes
- There are no right or wrong answers; we just want to hear your views and any information you provide will not be traced back to you in any way.
- With your permission, the interview will be audio-recorded so that we can refer back to the recording in the future. All recordings will be destroyed when the research has been completed
- We may choose to use quotes from your interview, however, you will not be personally identified in any of these

### Introduction:

1. What council do you work with?
2. How long have you been an RSO?

### Current or past initiatives:

3. Are you currently promoting any initiatives for motorcyclist safety?
4. What are they? What do they involve?  
 Prompt: Anything particularly on helmets?
5. If none: have you had any initiatives on this in the past? (2007 onward)  
 What were they? What did they involve?  
 Prompt: Anything particularly on helmets?

### SHARP:

6. What do you know about SHARP?  
 Where did you learn this from?  
 Prompts: website, colleague, online, other publications?
7. Have you ever visited the SHARP website?
8. What do you think is the purpose of SHARP?
9. Is SHARP featured in any of your current initiatives?  
 If yes, what?  
 Prompt: any examples.  
 Has it been featured in anything you have done in the past?  
 How? To what extent?

10. Do you have any information about SHARP on your website?

If not, why not?

11. Do you find it easy to understand?

Do you find it is easy to promote?

How could it be improved?

Prompt: what would make it easier to understand and/ or promote?

12. Are there other ways it could be used?

Prompts: how? How can it improve safety? How could it be implemented?

13. Are there any limitations to using SHARP in road safety initiatives?

What are they?

How could they be overcome?

14. How easy or difficult do you think motorcyclists find SHARP to understand?

Do you think motorcyclists use SHARP when looking to buy a helmet?

Why/why not?

**More about current or past initiatives:**

15. What are the motivations for undertaking road safety initiatives in your local authority?

Prompts: identified local issues, generally on the agenda, campaign timetable (for example, if they have key safety messages on rotation)?

How regularly do you promote motorcycle helmet safety?

What methods do you use?

16. What do you think is the best way to promote safety messages to the motorcycling community?

**Final question:**

Is there any other information we haven't covered (relating to SHARP) that you would like to comment on?

## Appendix 12: Task 4 Interview guide (Motorcycle trainers)

### Introduction:

I am from The Transport Research Laboratory and we are undertaking this work on behalf of the Department for Transport.

### Purpose:

We are seeking your views regarding SHARP (Safety Helmet and Assessment Rating Programme), and its effect on how motorcyclists decide which helmets to purchase.

### Information:

- Your participation is voluntary
- The Focus group will last no longer than 2 hours
- There are no right or wrong answers; we just want to hear your views and any information you provide will not be traced back to you in any way.
- With your permission, the focus group will be audio-recorded so that we can refer back to the recording in the future. All recordings will be destroyed when the research has been completed
- We may choose to use quotes from your focus group, however, you will not be personally identified in any of these

### Introduction (going around the table):

1. Could you please tell me your first name and how long you have been an instructor.
2. How many students do you tend to have on a monthly basis?

### About SHARP ratings:

3. What do you know about the SHARP helmet safety rating scheme?

How did you first learn about SHARP?

Prompts: where? From who? colleague, a student, the internet (if so, SHARP website?), training

4. Have you ever visited the SHARP website?

Why/ why not?

5. What do you think is the purpose of SHARP?

6. Have you ever made use of SHARP when purchasing helmets either for work or leisure? *[ensure they describe whether work or leisure]*

How do you use it?

Examples: teaching other motorcyclists, other road users, for own/ personal knowledge?

If not, why not?

7. Do you find SHARP ratings useful?

Prompts: it helps to open discussions about safety equipment, it useful to help students/ yourself choose the right helmet, ensures safety.

What is useful about SHARP?

What can be done to make it (the ratings) more useful?

### Teaching about SHARP:

8. Are students informed about SHARP as part of the standard training programme?

What information do you provide?

What key elements of helmet purchasing do you recommend to your students?

Prompt: Helmet type, helmet style, helmet fit, features, brand, name, comfort, aerodynamics, noise, safety

How does it fit in with the training you provide?

How much time do you tend to spend on this?

Prompt: relative to the rest of the training time (5 minutes, 1 hour, daily?)

If not, why?

Do you include information about choosing equipment on your website?

If not, why?

9. Do students find SHARP ratings useful?

Prompt: what kind of questions do students ask about SHARP?

Do students tend to go and do their own research about it? (i.e. visit the website, ask other riders?)

10. How often are students aware of SHARP before your discuss it with them?

Prompts: all, none, 1 in 5, rarely.

If so, what do they know about it?

Where do they find out about it?

11. In general, what do trainees seem to prioritise in terms of safety gear?

What are they looking for (prompts: looks, safety, price?)

How does it vary by (perceived) types of rider? or ages?

### Improving safety:

12. In your opinion, is SHARP well known among motorcyclists in general?

13. Who is seen as being responsible for informing the public about helmet safety and SHARP?

Who *should* be responsible for informing the public about helmet safety and SHARP?

How should it be communicated?

Prompts: where responsibilities lie; campaigns, emails, training.

14. What role can trainers play in improving the general public's knowledge of helmet safety?

What about SHARP ratings specifically?

15. How could the SHARP helmet safety rating scheme be improved?

**Final question:**

Is there any other information we haven't covered (relating to SHARP) that you would like to comment on?