Mobility scooters: a market study

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Research Institute for Consumer Affairs (Rica)

Contents

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1 Introduction

This study has been commissioned by the Department for Transport to help fill an evidence gap on the make-up and trends of the UK mobility scooter market and inform future policy or policy amendment. This includes policies directly related to mobility scooters (such as the Use of Invalid Carriages on Highways Regulations 1988), but also a wider range of transport policies and regulations that address the needs of disabled and older consumers with mobility impairments. Many such policies are based on the assumption that people with significant mobility impairments use wheelchairs (manual or powered). Mobility scooters differ from wheelchairs in a number of ways, including build specification, manoeuvrability and speed. The range of transport and road policy areas that could potentially be impacted by a significant growth in numbers of mobility scooter users include

- Pedestrian safety
- Road safety
- Public transport carriage
- Mobility scooter driver licensing
- Mobility scooter driver Insurance
- Mobility scooter driver training/assessment requirements

Types of mobility scooter

Legally, mobility scooters are divided into two categories. Class 2 mobility scooters are intended for pavement use only – they can only reach 4mph, the legal limit for use on the pavement. Class 3 mobility scooters are intended for use on the road or the pavement – they can reach up to 8mph, but must have a setting that can limit their speed to 4mph for use on the pavement. They must be fitted with lights and indicators and be registered with the DVLA to be used on the road.

This report and many marketing materials further divide class 2 scooters into two categories based on their design. Three categories are used in total:

- Class 2 boot scooter: dismantles or folds to be carried in a car boot.
- Class 2 pavement scooter: larger, not intended for car boot use.
- Class 3 road scooter: designed for road use.

2 Executive summary

2.1 Research activities

This study reports on three specific aspects of the mobility scooter market:

- **Mobility scooter market trends**
  Published commercial market data and two recent market studies of the mobility products sector by the Office of Fair Trading (OFT) and Consumer Focus have been reviewed to help determine the current size of the mobility scooter market, numbers of UK scooter users and future trends. Market data and trends were also discussed with a number of key industry stakeholders including the British Healthcare Trades Association (BHTA), Motability and a sample of retailers and distributors.

- **Profile of mobility scooter users.**
  A new, UK-wide Rica survey of 480 scooter users was conducted and used to inform a statistical profile of mobility scooter users' background, mobility scooter use, purchasing priorities and safety. Drawing on this data, a set of five personas has been developed for use in policy making. These serve to demonstrate the wide range of mobility scooter users' profiles, motivations and experiences.

- **Consultation on class 3 mobility scooters.**
  A consultation workshop was held with representatives from scooter user groups, businesses and regulatory bodies to specifically explore issues affecting the purchase and use of class 3 mobility scooters, designed for road use, including the sales process, licensing, registration and insurance.

2.2 Key findings

Our review of published market data and research and consultation to investigate market size and trends found that:

- There is a lack of comprehensive, reliable commercial data on the size of the mobility scooter market. Published data focuses on sales value rather than units sold. "Best estimates" put the number of units sold per year at approximately 80,000 and total number of UK users at approximately 300-350,000.
- All data and our consultation confirm high levels of annual sales growth in the sector (5-10%) with evidence of increased advertising and a widening range of retail options - specialist and mainstream shops, charity trading arms, second-hand sales, catalogue and online retailers.
- Online retail is growing and offers substantially cheaper products, but does not give consumers the same opportunities for the necessary user assessment and training that all stakeholders recommend.

- Prices of mobility scooters vary widely. Recommended retail prices (RRPs) are widely published but do not accurately represent sales prices which are often substantially lower.
- Mobility scooters have an uncertain status: are they a “disability” or a “lifestyle” product? This ambiguity could affect exemption of VAT on purchase.
- Mobility scooters are reasonably robust and can be used for a number of years.
- Some stakeholders noted that performance claims made by manufacturers and suppliers, particularly with respect to battery life, range, speed and climbing ability, are frequently unreliable.

Our UK-wide 480 person survey to investigate the profile and experiences of mobility scooter users found that:

- 53% of respondents were under 65 years old, indicating that scooter users include many younger people.
- 48% of respondents owned a wheelchair as well as a mobility scooter and 27% owned more than one type of mobility scooter.
- Many respondents were reliant on their mobility scooter: 74% said they would not make the same journeys if they could not use their scooter.
- Class 2 boot scooters were the most common type of scooter owned.
- Almost all respondents travelled on the pavement and 45% travelled on roads.
- 21% of respondents reported accidents or incidents on their scooter, mostly on pavements. However, most of these were relatively minor and involved tipping not collisions.
- 59% had received some training in using a mobility scooter.
- 51% of mobility scooters owned were bought from a shop and 30% were bought online (the remainder were bought from friends or acquaintances or through printed advertisements in eg newspapers).

Our consultation workshop with stakeholders to discuss issues of concern around class 3 mobility scooter users found that:

- New purchasers are not guaranteed access to good information and assessment of their needs due to a lack of available product information and advice about how to determine scooter suitability for an individual user.
- There is a perceived lack of training and familiarisation opportunities necessary to ensure safe use of mobility scooters.
- The purpose and exact requirements of the registration of class 3 mobility scooters are not clear.
- Scooter legislation is often not followed by buyers, retailers or manufacturers, either because it is not understood or because of flaws in the system.
- There is a perceived lack of interest in policing the regulations affecting the use of mobility scooters and a lack of data on the real risks of mobility scooter use.
- Disposing of mobility scooters after use has issues – recycling is difficult and expensive, and registration requirements cause problems with both disposal and re-sale.

2.3 Conclusions and recommendations

- There remains an urgent need for accurate statistics on mobility scooter use for policy makers and those planning public transport, road and pedestrian infrastructure. Commercial market sales data is not an accurate source of this data, given its focus on sales value rather than units sold and the growing second hand market which is not covered. A preferable method would be to commission a series of Omnibus surveys (in different localities) to identify typical usage levels per thousand of population.
- While exact numbers remain unclear, significant growth in scooter sales has been confirmed. Transport and planning authorities need to make provision for increasing numbers of mobility scooter users of all ages when planning infrastructure developments (including roads, shopping centres and transport networks).
- Future legislation should account for the fact that mobility scooters are not primarily road vehicles – they are more commonly used on the pavement.
- More research is needed to clarify the safety issues associated with increased pavement use of scooters, in particular stopping distances.
- The requirement to register class 3 vehicles should be reviewed. The legislation is ambiguous and compliance and policing patchy. Local and police authorities are not clear where responsibility lies for ensuring class 3 scooter users are complying with relevant legislation. There may be a case for amending the legislation or removing the requirement entirely.
- Not all suppliers of class 3 mobility scooters inform buyers of their responsibility to register them with DVLA. This includes NHS wheelchair services. This causes difficulties in the handling of used mobility scooters (both resale and scrapping).
- Compulsory insurance is likely to be unpopular. However we recommend a consultation with representatives of the insurance industry to identify possible options for widening access to low cost insurance including through retail and training packages and schemes.
- Greater availability of local (community based) and national training schemes for mobility scooter users are required, particularly given the growth in online purchase.

3 Mobility scooter market trends

A key objective of this study has been to determine current numbers of UK mobility scooter users together with future trends, drawing on available commercial market data. Such data, it was believed, could potentially reveal trends in scooter sales and also trends in sales of mobility scooters relative to wheelchairs.

In our analysis we have looked at both published commercial market data and two recent market studies of the mobility products sector by Consumer Focus in 2010 and the Office of Fair Trading (OFT) in 2011. We have also consulted with a number of key industry stakeholders including the British Healthcare Trades Association (BHTA), Motability and a sample of retailers and manufacturers. Details of these studies, data and consultations are given below.

3.1 Key findings

- Much of the published commercial market data is incomplete or inconsistent and should be treated with caution. This view is confirmed by the OFT and Consumer Focus market studies and our consultations with industry stakeholders.
- "Best estimates" drawing on all sources including our consultations put UK annual sales value of "mobility equipment" (defined as scooters, wheelchairs and daily living aids such as stairlifts, walking frames , rails and bathing hoists) at approximately £500 million (OFT) and UK sales value of mobility scooters and wheelchairs at approximately £200 million (BHTA); annual sales numbers of mobility scooters at approximately 80,000 per annum and the total number of mobility scooter users at 300,000 – 350,000 per annum (BHTA).
- Sales of mobility scooters are increasing at a rate of approximately 5-10% per annum.
- There is substantial growth in the second hand market and in internet sales, as well as in retail advertising.
- Registered Retail Registered Prices (RRPs) for mobility scooters do not accurately reflect sales prices which are often very much lower.
- Class 2 boot scooters are the most popular type of mobility scooter.
- It is common for mobility scooter users to own more than one scooter, or to use a wheelchair as well.

3.2 Review of market research

3.2.1 Commercial market data

A review of the published commercial market data in this area unfortunately reveals a lack of comprehensive consistent information. This is true of market data for the "equipment for disabled people" market as a whole, but is particularly the case at sub-sector levels such as "mobility equipment" or "mobility scooters". In these cases data is sometimes not collected; and when it is collected different research companies use different methodologies, and sometimes different definitions. The term "mobility equipment" can be used to refer to just wheelchairs and mobility scooters. Others define "mobility equipment" or the "mobility sector" as including wheelchairs,

mobility scooters plus other "daily living aids" including equipment such as stairlifts, grab rails, bathing equipment etc. Given these inconsistencies of definition and methodology market data does need to be treated with caution.

A further reason cited for the lack of comprehensive data is the complexity of the market – in particular the diverse range of distribution channels, from the NHS to mainstream, specialist and online retail. Finally, where commercial market data and reports are available, they are primarily aimed at corporate investors and consequently their focus is on the financial performance of the companies involved and the value of the sector, rather than the number of units sold. Given the wide range of types of mobility scooters and retail prices (see 3.4) it is not possible to determine total numbers of mobility scooters sold from annual sales value data with any accuracy.

The two main market data reports that comment on the mobility scooter market are published by Key Note Ltd[1] and Global Industry Analysts[2] and in Table 1–Table 3 below we summarise this data. It should be noted that each company collects data in slightly different ways and it is not possible to make direct comparisons. Key Note Ltd draw on Office of National Statistics for manufacturing sales of equipment for their analysis and Global Industry Analysts collect data at manufacturer's level. Nether report includes any comment or data relating to the second hand market or internet sales from overseas suppliers or manufacturers. Data on numbers of mobility scooters sold annually is as opposed to sales value is only available from Global Industry Analysts, who report 2011 sales of 122,000 units.

***Equipment for the disabled market report 2009-2013*, Key Note Ltd, 2014**

	2007	2008	2009	2010	2011	2012	2013
Mobility scooters	77	81	83	85	89	91	96
Wheelchairs	136	140	145	148	152	159	162
Total	213	221	228	233	241	250	258

Table 1 The UK Market for Mobility Equipment by Value at Current prices (£m at retail sales price), 2007 – 2013

Wheelchairs (powered and manual): A Global Strategic Business Report, Global Industry Analysts, Inc. (2012)

Product	2009	2011	2013	2015	2017
Manual w/chair	84.36	88.71	96.24	106.71	116.53
Powered w/chair	27.37	29.02	31.70	35.72	40.07
Powered mobility scooter	182.42	209.67	245.37	290.11	335.81
Total	294.15	327.40	373.31	432.54	492.41

Table 2 UK Recent past, current and future analysis for wheelchairs by product segment by annual sales in US$ Million for the years 2009 through 2017.

[1] *Equipment for the disabled market update 2014.* Key Note Ltd, 2014
[2] *Wheelchairs (powered and manual): A global strategic business report.* Global Industry Analysts, Inc. 2012

It notes that

- a 10% error tolerance +/-
- exchange rate is 1 US$=0.62 British pounds (data is standardised at 2011 rates)
- data is not adjusted for inflation

Product	2009	2011	2013	2015	2017
Manual w/chair	234.97	248.23	271.07	303.16	333.91
Powered w/chair	111.52	12.73	14.57	17.07	19.53
Powered mobility scooter	103.48	121.68	145.84	177.05	209.65
Total	349.97	382.64	431.48	497.28	563.09

Table 3 UK Recent past, current and future analysis for wheelchairs by product segment by annual sales in '000 Units for the years 2009 through 2017.

It notes that

- a 10% error tolerance +/-

The levels of mobility scooter sales activity outlined in this published market data were discussed with UK industry representatives as part of our consultations. The general consensus is that reported levels are overstated. The British Healthcare Trades Association estimate current (2014) annual sales value for the mobility sector (defined as wheelchairs and mobility scooters only) at £200 million, with current levels of annual sales at approximately 80,000 and total numbers of mobility scooters in the UK estimated at approximately 300,000 – 350,000.

Interestingly however, when it comes to growth of the mobility scooter market - the British Healthcare Trades Association and the market data all agree that there is significant growth. The BHTA estimate annual growth in sales at approximately 5-10%. Key Note Ltd figures show approximately 6% and Global Industry Analysts approximately 7%.

3.2.2 Independent market studies

As noted, two independent market studies have also recently commented on the mobility scooter market as part of wider studies – one from Consumer Focus in 2010[3] and another from the OFT in 2011[4].

The Consumer Focus report focused on the equipment sector in general and changing systems of statutory provision, with some analysis of the mobility sector. The OFT study was conducted as a result of concerns raised by consumer groups about the mobility market. Their investigation focused on whether consumers are treated fairly and specifically whether the supply of wheelchairs in the UK was competitive. Although the mobility scooter market was not the main focus of either report, both comment on aspects of it. Below we highlight their key findings.

[3] *Equipment for older and disabled people: An analysis of the market.* Consumer Focus, 2010.
[4] *Mobility aids: An OFT market study.* Office for Fair Trading, 2011.

Both studies specifically comment on the difficulty of obtaining accurate market data. Consumer Focus note that:

> *"there is a lack of comprehensive, reliable and up-to-date information in the public domain on the sizes of the various market sectors, and on the numbers of users of such equipment whether through private purchasing or public provision."*

In terms of market size, the OFT estimates the 2010 value of the "mobility sector" (including wheelchairs, scooters, stair lifts, bath aids, hoists, adjustable beds and specialist seating) at between £430 million and £510 million. Their estimate draws on estimates from interested parties and adjusted data from two market reports: Key Note (2009), *Equipment for the Disabled* and Global Industry Analysts (2011), *Wheelchairs (powered and manual): A Global Strategic Business Report*.

Consumer Focus report the BHTA estimate sales of mobility products (scooters and wheelchairs only) at £200 million. However, they also note that published commercial reports give higher (and varying) estimates. For example Plimsoll Publishing estimate the UK market for "disabled equipment" at around £1.67 billion and the UK market for powered wheelchairs and mobility scooters alone at around £800 million. Key Note Ltd is noted as putting the UK market for "mobility equipment" (including daily living aids) at £501 million.

3.3 Consumer options for getting a mobility scooter

The vast majority of mobility scooters are purchased privately rather than provided with public funds. They are generally not available through the NHS, although people in receipt of personal health budgets and direct payments can choose to spend their budget on a mobility scooter. In addition, people receiving certain disability benefits can choose to use them to lease a scooter through the Motability scheme. However, Motability customers may only lease a car, or a powered wheelchair or scooter - and the number opting for scooters is relatively low (approximately 10,000).

Depending on a buyer's location and access to the internet, consumers buying privately have a wide choice of retail options:

- specialist mobility aids shops and charity trading arms (e.g. Age UK). Many sell via home visits, catalogues and phone.
- mainstream stores (e.g. Argos)
- online specialist mobility retailers
- online second-hand retailers (e.g. eBay)

3.3.1 Changing retail market

Over the last decade the retail market for mobility scooters has moved towards increased mainstream and online retail. The Consumer Focus 2010[5] report specifically comments on the trend towards increased mainstream retail:

[5] *Equipment for older and disabled people: An analysis of the market.* Consumer Focus, 2010.

> *"Until recently, the retailers involved in mobility equipment consisted mainly of specialist shops. However, some generalist retailers are now stocking these products." (page 22).*

The mainstream retailers mentioned in the report are Halfords, Argos, Asda, the Southern Co-operative and Aldi. However, not all of the retailers mentioned currently sell mobility scooters.

All stakeholders and users consulted for this study report the trend towards increased internet sales of scooters. 30.5% of respondents to Rica's survey acquired their mobility scooter online – the second-most popular source after retail shops (50.6% of respondents). Many retailers will deliver throughout the UK and a Google search by Rica for "buy mobility scooters" in March 2014 returned 2,800,000 results and 20 sponsored adverts. Internet purchase has inevitable implications for the level of assessment, training and service provided by retailers, as compared to shop based retail.

Finally, there is a significant and growing second hand mobility scooter market. Second hand mobility scooters are now sold at many specialist retailer outlets – in store and online. In addition, a search of eBay by Rica in March 2014 returned 13,162 listings. Second hand mobility scooters are also commonly advertised in local freesheet papers and by local disability and older person groups. Neighbours or friends are also a potential source of used mobility scooters. 30.5% of respondents to Rica's survey of mobility scooter owners (see 4), acquired their mobility scooter second-hand.

3.4 Mobility scooter prices

The price and therefore affordability of mobility scooters is a factor in the growth of the sector, given that the vast majority are privately purchased. Recommended retail prices (RRPs) for mobility scooters are set by manufacturers and widely published in their brochures and online. Rica collects this data from manufacturers and publishes RRPs for c200 mobility scooter models on a searchable database on its consumer website (www.rica.org.uk/pwcs).

	Mean price	Highest price	Lowest price
All mobility scooters	£3,256	£10,000	£389
Class 2 mobility scooters	£2,102	£4,695	£389
Class 3 mobility scooters	£4,192	£10,000	£749

Table 4 Mean, highest and lowest RRPs for mobility scooters on Rica's searchable database.

It should be noted however, that Rica research indicates that RRPs are generally not an accurate reflection of the actual sales price in the case of mobility scooters. Significant variation in price exists many retailers sell at 10-20% lower than the RRPs, and significantly lower when selling online, sometimes with discounts of up to 70%.

Similar price variation was found by the Office of Fair Trading (OFT) within its 2011 review of the mobility aids market[6]. The OFT collected data on sales prices for a range of mobility scooters at different retailers and found that sales price for the same brand and model of mobility scooter

[6] *Mobility aids: An OFT market study.* Office for Fair Trading, 2011.

varied widely. In one instance, a mobility scooter was available for £4,295 at one retailer and £1,295 at another – a 232% variation in price, or equivalent of a 70% discount.

Average spend on a mobility scooter was also investigated by the consumer organisation Which? in a recent survey of its members and the public regarding mobility scooters (see 4.4 for more on this). The overall average spend on a mobility scooter was £1,057, but this varied according to the source and type of mobility scooter.

- Respondents spent on average £1,317 on a new mobility scooter but £508 on a second-hand mobility scooter. Mobility scooters paid for with the help of a charity or social services cost £1,436 on average.
- On average, class 2 boot scooters cost £806, class 2 pavement scooters cost £801 and class 3 scooters cost £1,681.

3.5 Stakeholder consultation

As noted, Rica carried out a series of interviews with industry stakeholders as part of its investigation of market size and trends. Here we summarise findings in more detail. Interviews were carried out with representatives of Motability Operations, two wholesalers, an insurance company and three retail organisations, including one operating a chain of mobility shops (see Appendix 1 for a list of stakeholders consulted) Respondents were asked about the following topics:

- the nature of the mobility scooter market – supply chains, types of product, quality and design of products and pricing
- changes in the profile of mobility scooter users and the products they choose
- the role of each stakeholder in the mobility scooter market
- assessment and information – how users choose appropriate products
- handover – including delivery, assembly, familiarisation and training
- servicing and maintenance
- registration.

3.5.1 Findings

Market size and trends

All retailers and wholesalers reported that the market for mobility scooters is sizeable and growing though most felt that the figures quoted in section 3.5 (Commercial market data) are exaggerated. The wholesalers consulted felt that the overall market figures provided by the OFT are the most accurate.

The majority of mobility scooters sold come in the class 2 boot or pavement scooter categories. Some respondents felt that increasing numbers of medium sized pavement scooters are being sold as users look for greater durability and stability than are available from the lighter models.

The retailers remarked on the uncertain status of mobility scooters. Are they a "disability" or a "lifestyle" product? They reported selling more mobility scooters in what they termed the "geriatric market". One expressed the opinion that many customers regard a mobility scooter as a leisure vehicle. They also noted that this ambiguity affects the requirement to pay VAT on the purchase of a mobility scooter.

The assessment process

As noted, mobility scooters are sold in consumers' homes, in mainstream and specialist shops and online. All stakeholders we spoke to stressed the importance of getting an assessment before buying a mobility scooter, to determine whether a mobility scooter is appropriate and which model(s) best suit the user's needs. The retailers all carry out their own detailed assessment either in the consumer's home or at their retail premises. These assessment cover the consumer's needs and wishes, their capabilities and relevant environmental and lifestyle considerations.

The retailers we spoke to also take care over the delivery of the mobility scooters they sell. They unpack and assemble the product on delivery and ensure the user has a chance to familiarise themselves with it and determine whether it will be suitable.

Online retail

Unsurprisingly, the retailers said that it was inappropriate to buy mobility scooters from online sources because they don't provide these two important parts of the service. There is a general recognition that online sources can offer mobility scooters at much lower prices, precisely because of this difference in service. Retailers were not confident that they can make this difference in service clear to consumers and some reported feelings of insecurity as a consequence. Anecdotally, some consumers appear to be visiting retailers for assessment and advice about suitable models, and then buying them online.

Motability

The Motability scheme provides an alternative supply model for mobility scooters, which includes maintenance, insurance and roadside recovery as well as assessment, assembly and familiarisation as described above as part of a package of "worry-free" mobility. It is available only to people in receipt of higher rate mobility component of DLA or the enhanced rate mobility component of PIP.

Product performance and maintenance

Mobility scooters are generally manufactured overseas (most commonly in the Far East), though some are made in the UK. Some manufacturers work closely with UK distributors on design to develop products suitable to the market and to users' needs. Other mobility scooters are treated more as commodities, being imported without branding and often sold to more than one UK distributor.

Stakeholders felt that many mobility scooters are reasonably robust and can be used for a number of years (though there were some dissenting voices, particularly from mobility scooter users consulted during the workshop). Larger mobility scooters are more reliable than smaller ones. They do need occasional maintenance checks but do not commonly need to be serviced. They sometimes need

repairs to worn or broken components including bearings, tyres and batteries. For some models this is practical, but in some cases the lack of availability of spares makes it more expensive to repair the mobility scooter than to replace it.

As noted below, there is a second hand market for mobility scooters, and all retailers we spoke to take mobility scooters in part exchange for new mobility scooters and offer reconditioned mobility scooters for sale.

Some stakeholders noted that performance claims made by manufacturers and suppliers, particularly with respect to battery life, range, speed and climbing ability, are frequently unreliable. These are strongly affected by environmental factors (terrain etc) and user characteristics (chiefly weight).

Findings relating to licensing and legislation are discussed in 5.

4 Profile of mobility scooter users

A key objective of this study has been to develop a clearer profile of people who purchase and use mobility scooters. Specifically the aim was to identify the types of people who buy mobility scooters (in terms of age and disability) and their motivations for doing so, as well as to gain insights into their experiences of purchasing and using mobility scooters.

This has been achieved through a new Rica survey of 480 mobility scooter users across the UK. Data from it has been used to inform:

- a statistical profile of mobility scooter users' background, mobility scooter use, purchasing priorities and safety
- a set of five personas intended to demonstrate the range of mobility scooter users' motivations and experiences.

We also report on a separate survey carried out by the consumer organisation Which? examining its members' experiences of purchasing mobility scooters to which Rica has been given privileged access.

4.1 Key findings

- 53% of respondents were under 65 yrs
- 96% of respondents used a scooter on the pavement and 45% used one on the road
- 27% owned more than one type of scooter
- 48% used a wheelchair as well as a mobility scooter
- 74% of respondents would not make the same journeys at all without a mobility scooter
- 59% had received training in using a mobility scooter
- 21% had experienced an accident or an incident that made them feel unsafe
- Class 2 boot scooters were the most popular type owned (57% respondents).

4.2 Mobility scooter user survey

4.2.1 Method

The 20-question survey was carried out by Rica between December 2013 and February 2014 and was available online and in print. The survey was publicised to members of Rica's consumer research and testing panels and paper copies were made available through Rica's networks with other disabled and older people's organisations, including local Shopmobility outlets, Mobility Centres and Disabled Living Centres. Online, the survey was promoted through Rica's social media profiles (Twitter, Facebook and LinkedIn), Rica's website and monthly email newsletter, email newsletters of disability organisations, and blogs and web articles for disability organisations. See Appendix 2 for a full list of organisations that promoted the survey. 480 responses were received (of which 47 were on paper and 433 were online). A copy of the survey questionnaire is available in Appendix 3.

4.2.2 Results

4.2.2.1 User profile

Figure 1 shows the age distribution of respondents. Interestingly, 53% were under 65 years, despite the fact that older people are more likely to be disabled[7].

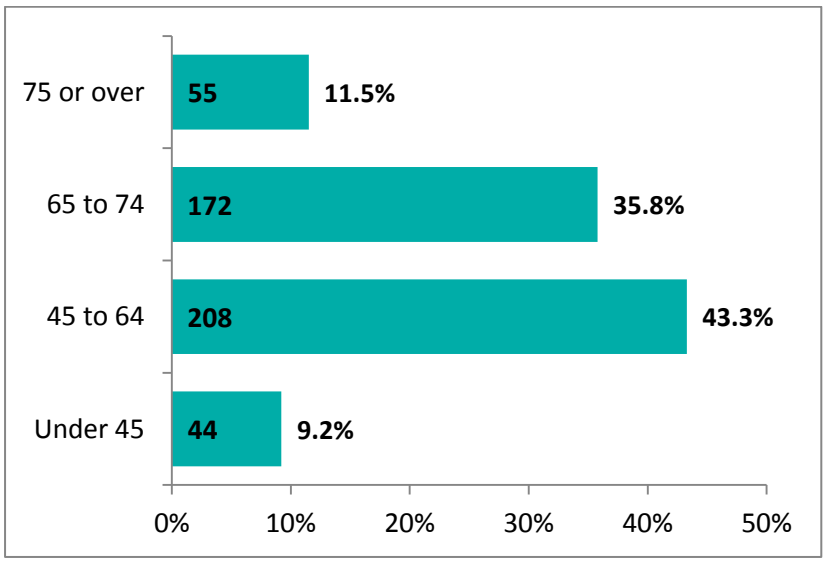

Figure 1: Proportion of all respondents belonging to each age group.

While younger people were perhaps over-represented in the sample (a large proportion of respondents completed the survey online) this profile is not unusual. In June 2012, a national survey in Australia established that more than 50% of scooter users were under 60 years old.[8] The study notes:

[7] *Life Opportunities Survey: Wave One Results 2009-11*. Department for Work and Pensions, 2011.
[8] Australian Competition & Consumer Commission, *Mobility scooter usage and safety survey report* (2012). At http://www.productsafety.gov.au/content/index.phtml/itemId/996221.

"Scooters are increasingly used by all ages as a mobility aid; older or less mobile people who have difficulty walking long distances use them and younger people with a physical disability".

Figure 2 shows the range of disabilities reported by respondents. Unsurprisingly, almost all respondents had mobility impairments. Disabilities affecting stamina, breathing or fatigue were also common. The third most common type of disability was impaired dexterity, something which could have an effect on many users' ability to use mobility scooter controls. Visual and hearing impairments could also potentially affect the user's ability to drive safely. Respondents were also asked how long they had been using a mobility scooter for. Most (364, 76%) had been using one for over two years. 93 (19%) had been using one for 6 months to 2 years, and 23 (5%) had been using one for less than six months.

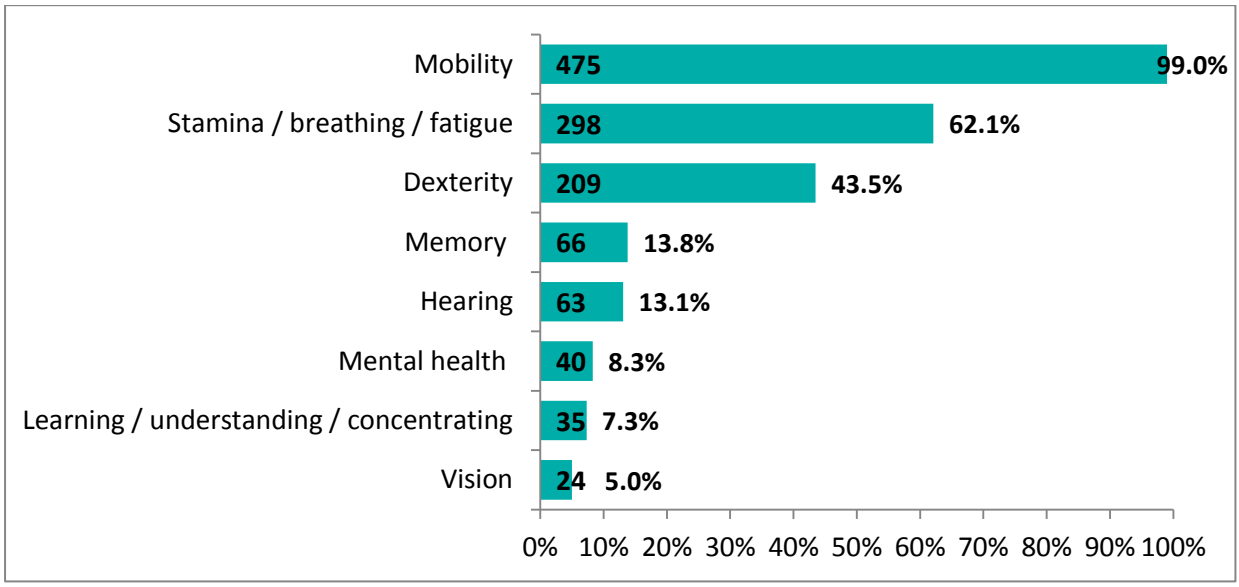

Figure 2: Proportion of all respondents who said they had each category of disability.

4.2.2.2 Ownership

422 (88%) respondents had their own mobility scooter. It is assumed that the remaining 57 (12%) used mobility scooters borrowed from a friend or rented from schemes such as Shopmobility.

Figure 3 shows the types of mobility scooter owned. Boot scooters were the most popular, followed by road scooters and then pavement scooters.

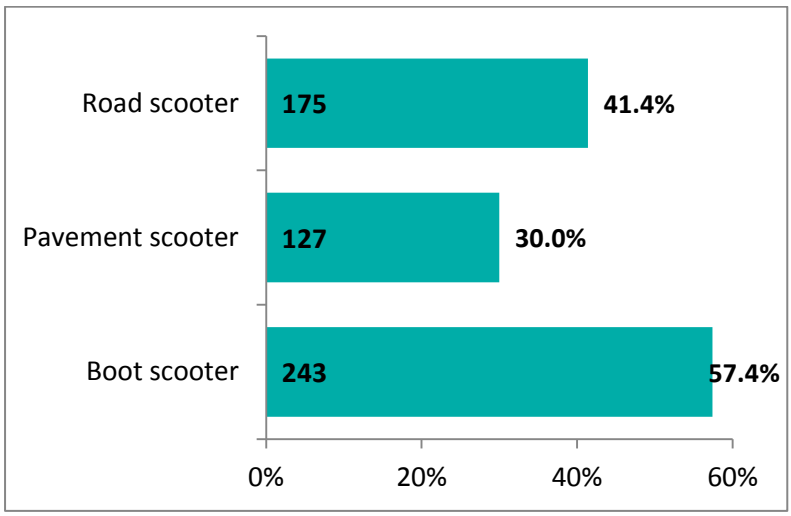

Figure 3: Proportion of mobility scooter owners who owned each type of mobility scooter.

Out of those respondents who owned a mobility scooter, 27% owned more than one type. In open comments at the end of the survey, several respondents stressed that they owned multiple mobility scooters and used them for different purposes.

To accommodate this, mobility scooter owners were also asked to pick the one type of mobility scooter they used most often (see Figure 4). The same popularity trends held. Respondents were asked to keep their most commonly-used mobility scooter in mind when answering the rest of the survey.

Combining the boot and pavement categories shows that class 2 mobility scooters are more popular overall – 64% of respondents used a class 2 mobility scooter most frequently.

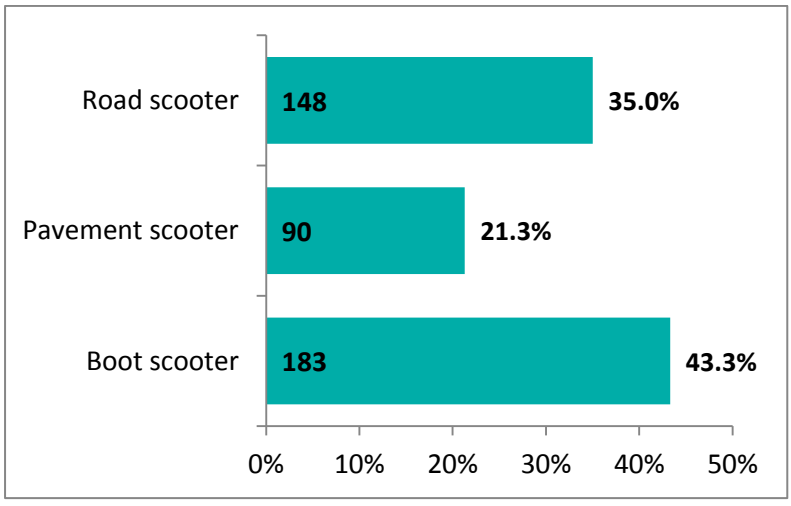

Figure 4: Types of mobility scooter used most frequently by mobility scooter owners.

Mobility scooter owners were asked where they got their most commonly-used mobility scooter and whether it was acquired new or second-hand. Table 1 below shows new mobility scooters were

more common. Second-hand mobility scooters were most likely to have been acquired online or via a friend or acquaintance.

		Source of mobility scooter				Total
		Shop	Online	Print advert	Friend/ acquaintance	
Status of mobility scooter	New	189	84	16	2	291 (69.5%)
	Second-hand	23	44	16	45	128 (30.5%)
Total		212 (50.6%)	128 (30.5%)	32 (7.6%)	47 (11.2%)	419 (100%)

Table 1 Frequency of mobility scooters bought from each source, either new or second-hand.

Boot scooters were more likely to be bought new (79% were, compared to 64% of pavement scooters and 62% of road scooters).

4.2.2.3 Reasons for using a mobility scooter

All respondents were asked why they decided to start using a mobility scooter – they were able to tick as many options as applied from the list shown in Figure 5. The most popular reason was to go shopping, followed by visiting other local places and going on trips further afield. Using a mobility scooter to get to work was the least popular option.

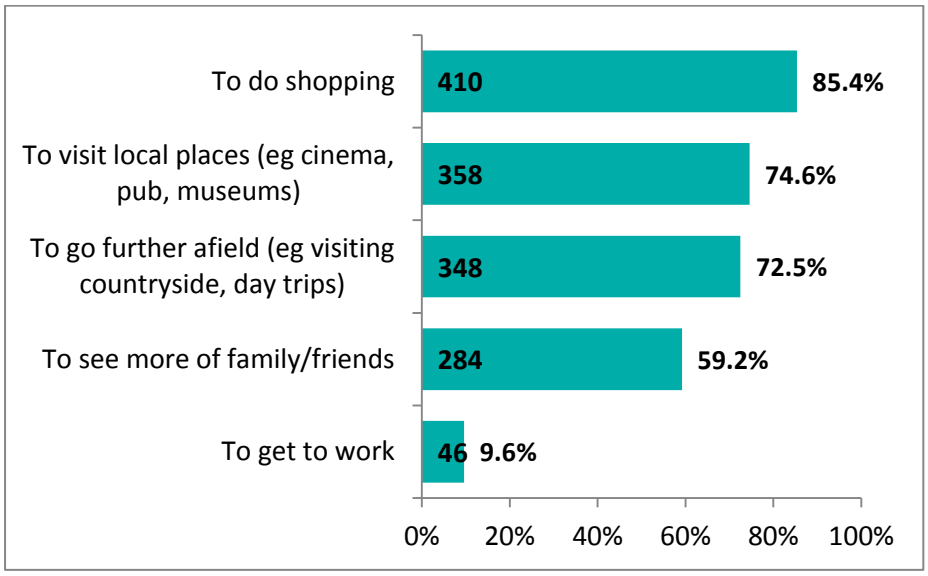

Figure 5: Respondents' reasons for starting to use a mobility scooter.

Respondents who had their own mobility scooter were then asked in more detail about how they made their choice (they were asked about their most commonly-used one if they owned several). They chose their top 3 most important features when looking for a mobility scooter – the most popular were the mobility scooter's range, whether it fit in a car boot and its comfort (see Figure 6).

There was also an option to write in extra features. Comments about looking for a mobility scooter that was reliable were common, as were mentions of the mobility scooter's ability to handle various terrains, its user weight capacity and the ease of lifting it into a car boot.

These priorities varied depending on the type of mobility scooter:

- Boot scooter users were interested in mobility scooters that fit in the car boot (89%), ease of lifting (53%) and price (36%).
- Pavement scooter users were interested in comfort (69%), range (63%), and price (57%).
- Road scooter users were interested in range (73%), comfort (64%) and ability to use on the road (60%).

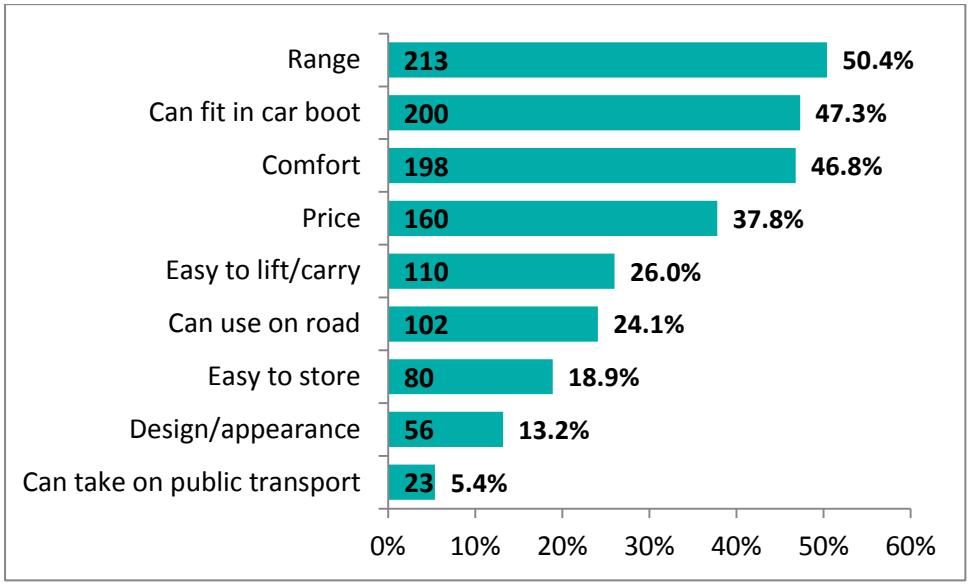

Figure 6: Factors selected in respondents' "top 3" factors influencing their choice of mobility scooter.

Respondents were also asked why they had chosen to use a mobility scooter over a powered or manual wheelchair. Almost half of mobility scooter-owning respondents (204, 48%) said that they did use a wheelchair as well as a mobility scooter.

Figure 7 shows the reasons given by the 187 (44%) who only used a mobility scooter (note that 8% of respondents did not reply to the question). Popular responses were that mobility scooters are easier to use and more comfortable. Most respondents seem to have made their choice because they felt a mobility scooter was more suitable, rather than for economic reasons: "mobility scooters are cheaper" was the least popular response.

Respondents were able to give freeform responses. Common responses were that they felt they could be more independent in a mobility scooter (these respondents were probably thinking of manual and not powered wheelchairs), that mobility scooters were better at going "off-road" and that mobility scooters felt safer.

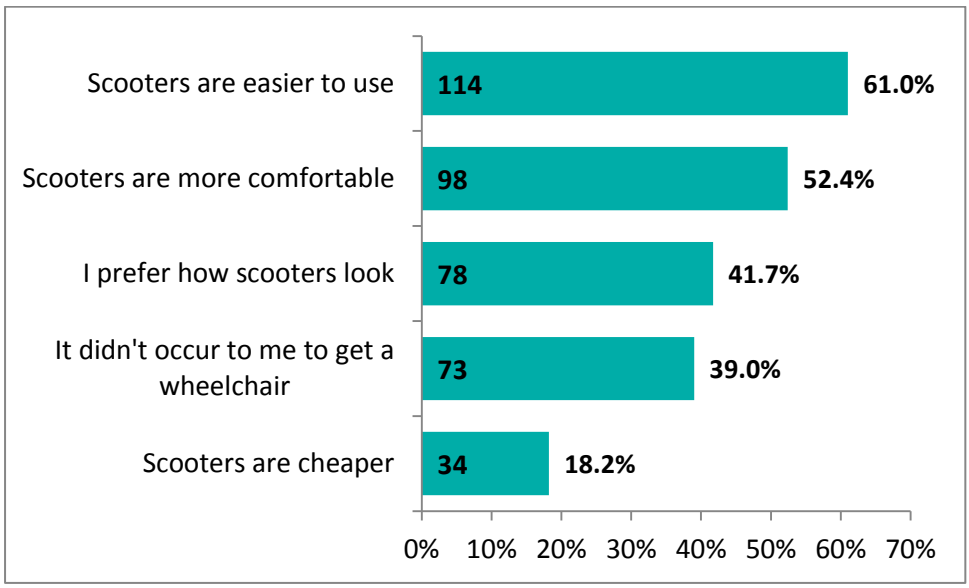

Figure 7: Reasons for choosing a mobility scooter over a manual or powered wheelchair, selected by respondents owning and using a mobility scooter only.

4.2.2.4 Journeys made

All respondents were asked where in their environment they used a mobility scooter. Figure 8 shows that almost all users travel on pavements, and a large majority also travel in parks or countryside and inside buildings such as shops. Slightly less than half use a mobility scooter on the road, and very few use them to get around their home.

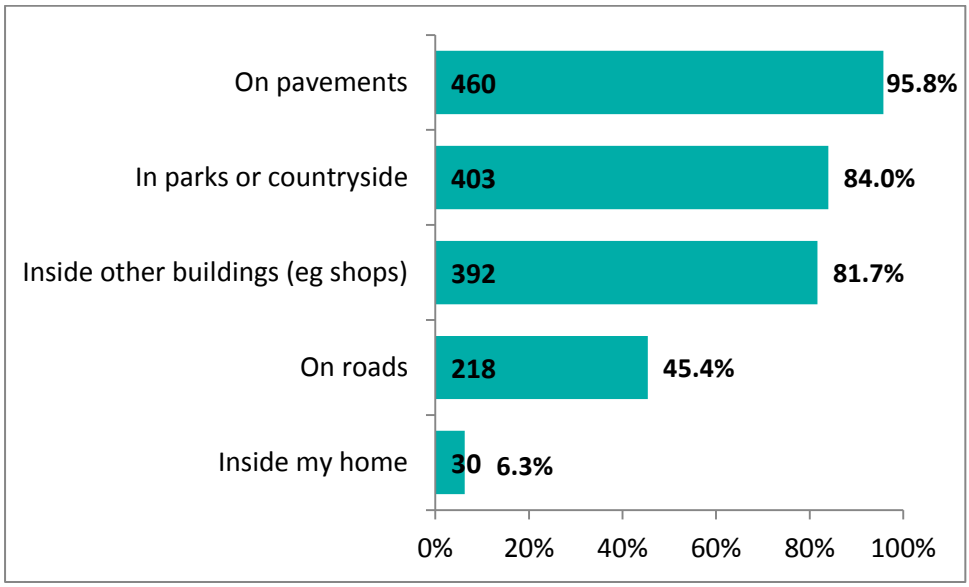

Figure 8: Proportion of respondents using a mobility scooter in different areas.

Respondents were also asked whether they used a mobility scooter in combination with other forms of transport (see Figure 9). Most mobility scooter users had travelled with a car (74%), but use on

other forms of transport was much less common. 21% had used a mobility scooter on a train, 19% in a taxi, 12% on a bus and 6% on a tram.

Mobility scooter use on public transport is limited by transport availability (trams only operate in a few UK cities, for example) and popularity with the general population (during 2012, 63% of all journeys made in the UK were by car[9]. As well as this, not all operators allow mobility scooters and those that do usually impose a size restriction. Rica has reviewed public transport operators' policies on mobility scooters and identified mobility scooters that meet these criteria [10]. Increased awareness of the fact that some public transport operators allow smaller mobility scooters may encourage people to make more use of public transport with their mobility scooter.

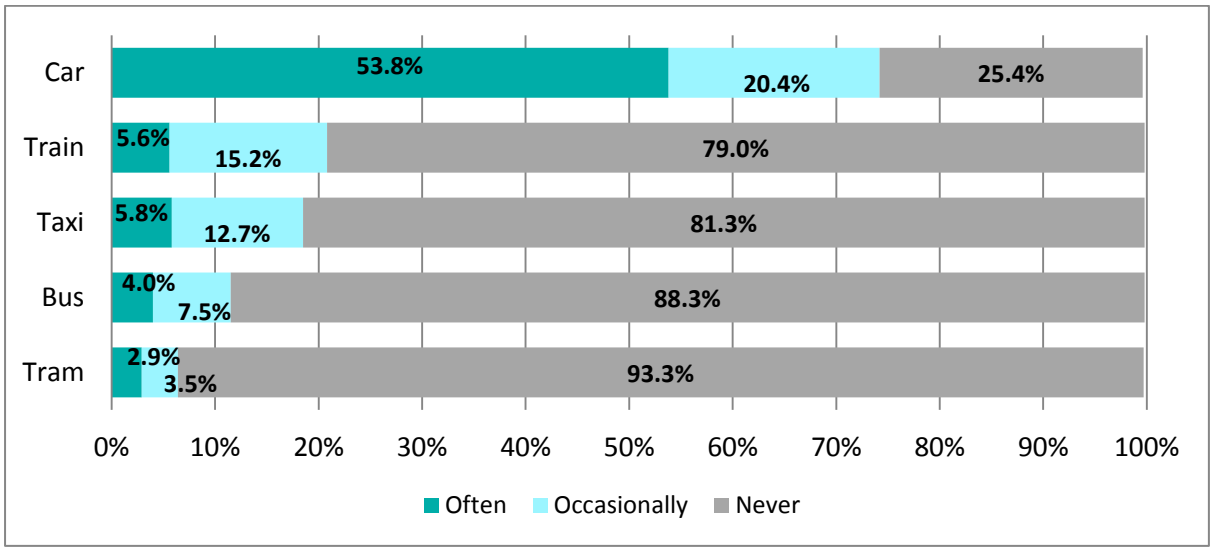

Figure 9: Proportion of respondents taking a mobility scooter with them when using different forms of transport.

5% of respondents, when choosing a mobility scooter, felt that its ability to go on public transport was one of the main factors affecting their decision (see above). Within this group, use of public transport with a mobility scooter was much higher – 83% used one on the train, 57% on the bus and 17% on the tram. This suggests that with the right mobility scooter, the majority of people who want to go on public transport can do so.

The majority of respondents rely on being able to use a mobility scooter: when asked, 357 (74%) said they would not make the same journeys at all without one and 112 (23%) said they'd make the same journeys but less often. Only 10 (2%) would make the same journeys just as often.

The 25% that that would make the same journeys to some extent were asked what forms of transport they'd use instead of a mobility scooter (see Figure 10). Cars were the most popular option – either "driving myself" or "getting a lift from someone else". Taxis, public transport and walking were less popular options. A few respondents said they would walk, but it should be noted that this

[9] *National Travel Survey 2012.* DfT, 2013.
[10] *The carriage of mobility scooters on public transport*. Research Institute for Consumer Affairs (Rica), 2013.

option was always ticked in combination with another form of transport (ie nobody felt that they could make the entire journey on foot).

Freeform responses were also allowed. 10 respondents said they would use a wheelchair to make the same journey and 2 said they would use organised community transport.

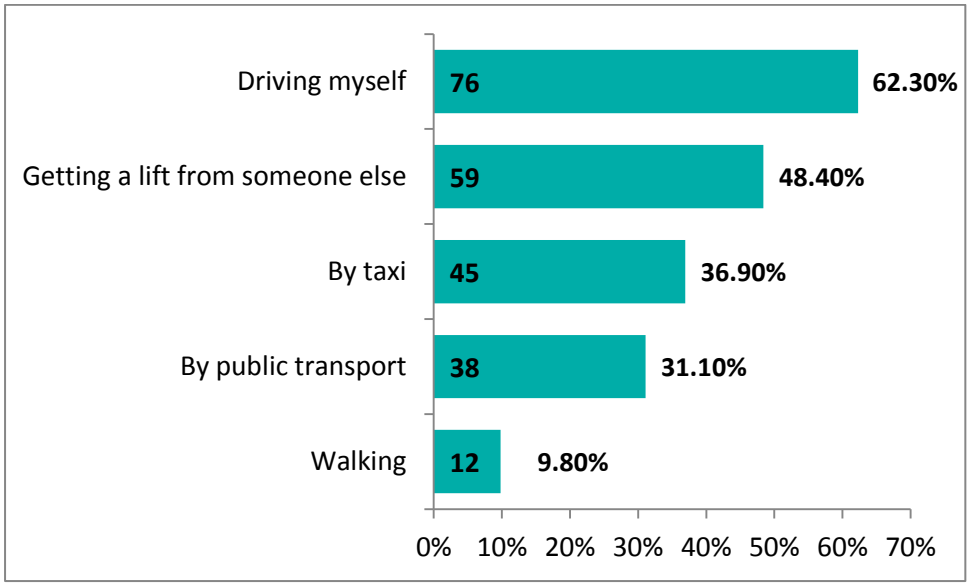

Figure 10: Modes of transport selected as means of making a journey without a mobility scooter, selected by respondents who felt they could travel without a mobility scooter.

4.2.2.5 Training and safety

Overall, 283 respondents (59%) had received training or practice on using a mobility scooter safely. 200 (42%) had received training from the retailer they bought the mobility scooter from, and 109 (23%) received training from another organisation, such as a local charity.

Respondents who had bought their mobility scooter online were slightly less likely to have received training – 34% had been trained by a retailer and 16% by any other organisation.

100 (21%) respondents said that they had had an incident that made them feel unsafe while using a mobility scooter. Those that had were given the opportunity to describe their experience in a freeform response.

The most common experience was tipping over while using the mobility scooter. Uneven or sloping pavements and rough terrains were identified as causes of instability. Some respondents had also tipped while turning a corner or attempting to climb a steep gradient. A few mentioned that they were using a three-wheeled mobility scooter at the time.

Collisions and near-misses were also reported with pedestrians, cars and cyclists, although none were described as causing serious injury. Respondents tended to blame the other party in these incidents – e.g. suggesting that pedestrians ignore mobility scooters or expect them to stop quickly. Some respondents also mentioned feeling unsafe around traffic generally.

A few respondents noted that problems with the mobility scooter's controls were to blame – e.g. braking with a long stopping distance, or catching or knocking the speed control. It should be noted that previous Rica research has identified concerns with the usability of mobility scooter controls[11].

Respondents more commonly reported experiencing incidents while travelling on the pavement, rather than on the road – this is the case even when allowing for the fact that more respondents travelled on the pavement. Respondents who reported using a mobility scooter on the road were also slightly less likely to have experienced an incident (18% had).

One explanation for this is that people who use mobility scooters on the road do so because they are more confident and careful drivers by nature; they either do not experience as many incidents or do not find them unsettling enough to report. Alternatively, it may be that pavements and kerbs present more opportunities for accidents owing to poor maintenance and the presence of pedestrians.

Training had only a small effect on whether the respondent had experienced an incident: 19% of trained users had experienced one, compared to 23% of untrained users and 21% of users overall.

Some evidence of unsafe behaviour was found: of those respondents who owned a mobility scooter but not a class 3, 24% reported using a mobility scooter on the road. It could be that these respondents were using their class 2 to drive along the road illegally; however, it's also possible that they were reporting times when they were just crossing the road.

4.2.2.6 Additional user comments

At the end of the survey, respondents were given the opportunity to share any other comments they had about using a mobility scooter.

The majority of responses were very positive about mobility scooter use – respondents wanted to highlight the fact that their mobility scooter gave them independence and an opportunity to socialise and reduce isolation. People used their mobility scooter to engage in a range of hobbies and trips.

Complaints about mobility scooters themselves were less common. A few wanted mobility scooters that were a more suitable size or easier to lift into a car boot, while others felt they had paid too much for a mobility scooter or its maintenance.

Some respondents were concerned about issues of accessibility – they wanted better access for mobility scooters in shops and businesses and on public transport. Concerns about the quality of pavements and kerbs were also raised. Some respondents felt that they encountered negative attitudes from pedestrians, and that they were sometimes the cause of collisions.

[11] Usability of Mobility Scooter Controls, Rica 2013, research report of user trials http://www.rica.org.uk/content/usability-mobility-scooter-controls

4.3 User personas

4.3.1 Introduction to personas

Responses from Rica's survey were used to create a set of five personas, outlined below. Personas are fictional archetypes used in design and policy-making to aid understanding of the experiences of different groups.

These personas were based on trends in the data provided by the survey and on respondents' freeform responses to questions about their experiences and reasons for using a mobility scooter. They are designed to provide an overview of the wide range of profiles and experiences mobility scooters can have, and should not be interpreted as strict definitions of user "types". A real mobility scooter user would be likely to identify with several of these personas to different extents.

4.3.2 Mobility scooter user personas

4.3.2.1 Borrowed mobility scooter user: Alice, aged 48

Alice borrows a class 2 mobility scooter once a week from her local Shopmobility. Like most people, her main reason for using one is to help her do her shopping. She's less likely to use a Shopmobility scooter to do something fun, like visiting her friends. She mainly sticks to the pavement and shops, and doesn't often use other transport on her journey. When she isn't using a mobility scooter, Alice travels by car. She can walk short distances and is independently mobile at home.

Alice was given some training on how to use a mobility scooter when she first started renting one. She feels very safe on the mobility scooter and has never had an accident or a near-miss.

4.3.2.2 Car boot scooter user: Bert, aged 64

Bert is used to getting around by driving, so when walking more than a short distance became difficult for him he looked for a mobility scooter he could take with him in the car. His main concern was finding something small and light that he could lift and stow in the car boot. He wasn't too worried about price – boot scooters are relatively cheap – so he bought his mobility scooter new from an online retailer without doing much shopping around.

Bert likes to drive to places with his mobility scooter in the boot and then use the mobility scooter to get around once he's there. He sometimes parks his car in the town centre and uses his mobility scooter to get around the shops. He's also taken the mobility scooter to out-of-town shopping centres and on seaside holidays with his family.

Having a small, light mobility scooter means he sometimes feels unsteady on uneven or tilted pavements. He once tipped out of the mobility scooter after catching it on a high kerb but wasn't seriously hurt. He has nearly run into pedestrians a few times – he feels that people often step in front of him without giving him time to brake.

4.3.2.3 Pavement scooter user: Claire, aged 60

Claire uses a relatively large class 2 mobility scooter. She mostly stays in her local area when using it, taking it from her home to the shops or to see her friends. At home she uses a manual wheelchair. She has taken the mobility scooter on the train a handful of times as well, though she prefers to use her wheelchair for train journeys.

Because she makes the whole journey on her mobility scooter, it was important to her to find one with good range. She also wanted a model with a comfortable seat that felt like it could take her weight easily. Claire doesn't drive much, so she felt that a larger mobility scooter would meet her needs better than a model designed to go in the car boot.

Price was a concern for Claire so she ended up buying the mobility scooter second-hand. The retailer showed her the basics of how to use it.

Claire once injured herself when her mobility scooter tipped over on a steep slope. She has occasionally driven her mobility scooter on the road – sometimes because the pavements in her area are too narrow or uneven for her – and has had some near-misses with traffic.

4.3.2.4 Urban road scooter user: Donald, aged 78

Donald lives in a medium-sized town and owns a class 3 mobility scooter. He also uses a manual wheelchair with help from his wife, but decided that a mobility scooter would allow him more independence.

Before buying, Donald knew that he wanted something that would let him get to the town centre, to his social club and to his friends' houses – all of which are a few miles from his home. He wanted to be able to go long distances relatively quickly, and to have a model that felt comfortable and sturdy for long periods.

He was expecting to spend quite a lot of money, so he was pleased to get a discount by buying from a friend who was moving away. He recently decided to spend a bit more on an extra mobility scooter for his car boot, which he uses on shopping centre trips.

Donald felt confident about using a mobility scooter on the road from the start, and has yet to have any accidents. He feels that drivers don't always notice him, though, and has been worried by a couple of incidents where a car almost hit him.

4.3.2.5 Rural road scooter user: Emily, aged 50

Emily owns a class 3 mobility scooter which she uses on the roads and in the countryside near her village. She takes her dogs for daily walks and also regularly goes out with a local Disabled Ramblers club which organises trips for mobility scooter users. Her car has a trailer attachment that lets her transport her mobility scooter long distances.

Her mobility scooter use is limited to these activities. She has a car and a powered wheelchair which she uses together when shopping and socialising.

Emily spent a lot of money on her mobility scooter, but felt it was worth it to be able to enjoy her hobbies independently. Her powered wheelchair doesn't have a good range and isn't suitable for rougher terrains. She sometimes goes on drives around the local countryside with her family, but prefers the sociability and fresh air that a mobility scooter provides.

She has had a few accidents since getting a mobility scooter – getting stuck in a muddy lane and falling when trying to cross rough terrain – but has not been seriously injured.

4.4 Which? mobility scooter survey

In 2013, *Which?* carried out a series of surveys targeted at its members and the public, looking at experiences of researching, buying and using a mobility scooter. Three samples were surveyed with different versions of the questionnaire:

- 1,707 *Which?* Connect members (*Which?* Connect is an online panel of consumers)
- 1,000 non-members (all UK adults)
- 1,173 respondents to the *Which?* Connect omnibus survey.

Broadly, the trends identified by *Which?* agree with those identified by Rica's own survey.

Of those who bought a mobility scooter, the majority bought a mobility scooter new (57%) but second-hand was also a popular option (33%). A small amount of respondents got their mobility scooter through a charity/social services or a friend (5% each).

Boot scooters were the most popular type of mobility scooter to buy – 44% of respondents who bought a mobility scooter bought one of this type. 28% bought a class 3 mobility scooter, 25% bought a class 2 pavement scooter and 2% did not know what type they had.

The *Which?* survey also covered some other topics.

The most popular source of information for people who had researched a mobility scooter was the internet (65%). 46% had contacted an assisted living or mobility centre, 25% had visited a high street shop, 24% had consulted with friends and family and 22% had spoken to a health professional.

Generally, mobility scooter purchasers were positive about the product they bought. 90% felt confident that they made the right choice of product, and 60% felt it had met their (or the user's) needs "a great deal".

However, 53% experienced a problem with the mobility scooter in the first 6 months after purchase. 20% reported difficulty with kerbs; 16% reported poor suspension and 16% found the mobility scooter too heavy to lift.

5 Consultation on class 3 mobility scooters

5.1 Key findings

Delegates identified a number of issues concerning the sale and use of class 3 mobility scooters. These included:

- a lack of information about available products and advice about how to determine which is suitable for an individual user
- a range of problems with the registration process combined with a lack of clarity as to its purpose
- a perceived lack of training and familiarisation opportunities
- a perceived lack of interest in policing the regulations affecting the use of mobility scooters
- difficulty servicing and reconditioning scooters and disposing of them, caused by unregulated construction and sale.

The proposed solutions to these problems included:

- provision of reliable independent information on mobility products by national information and advice bodies
- the promotion of proper assessment to prospective buyers of mobility scooters
- the scrapping of the registration process (or the transferring of responsibility for registration from the buyer to the seller and stronger enforcement of this obligation)
- a national scheme for the resale and recycling of used mobility equipment.

5.2 Introduction

Rica conducted a workshop with stakeholders to explore the issues surrounding the purchase, registration and use of class 3 mobility scooters, including servicing and maintenance and disposal (including resale). The particular focus of the workshop was the safety of scooter users and others around them and on the legislative context (specifically registration of Class 3 Mobility Vehicles).

Delegates were representatives from suppliers and retailers, regulatory bodies, local and police authorities, advice agencies and other interest groups, including user groups;[12] a full delegate list is given in Appendix 4. After some preliminary discussion and the presentation of draft findings from the scooter user survey, delegates took part in two exercises facilitated by Rica staff.

In the first exercise, delegates were separated into groups and asked to consider the problems associated with the five aspects of scooter ownership:

- Buying
- Registration

[12] DVLA were invited and a number of staff members were put forward as delegates. In the event none was able to attend.

- Use
- Service and maintenance
- Disposal (including resale and recycling).

Each group was asked to consider the question from the point of view of a different stakeholder group: scooter users, regulatory bodies and dealers/suppliers. The problems identified during the exercise were then discussed in the group as a whole and the key problems at each phase were agreed on.

In the second exercise, delegates remained in the same groups and were asked to develop solutions to the problems identified in the first exercise. They were asked to identify solutions that could be provided by the particular stakeholder group they had been assigned to ("Something I can do") and solutions that could be provided by other parties ("Something someone else can do").

5.3 Results

5.3.1 Buying a scooter

5.3.1.1 Problems of buying a scooter

The problems associated with buying a scooter that were identified by the workshop were primarily concerned with the difficulty in getting reliable information. Participants identified the following issues:

- Buyers don't know where to go for reliable/up to date information.
- Not all buyers get a proper assessment of their needs and abilities.
- There is a lack of advice on legislation, training and insurance.
- There is a lack of traceability/accountability.

Consumers are unable to find reliable or comprehensive information on scooters and the regulations surrounding their purchase and use and they don't always get the support they need to ensure that the scooter is appropriate to their needs and capabilities. Often they put themselves in the hands of a local dealership.

Responsible retailers ensure they make a full assessment of a user's needs including their home environment and other conditions of use. They will recommend a suitable product within their product range and even advise against getting a scooter if they don't think one is appropriate. They will also have the appropriate information about registration and other legislation and may offer familiarisation training and safety advice. There is, however, no guarantee that a retailer will provide this level of service and the buyer has no recourse if the product proves to be unsuitable (beyond statutory consumer protection).

5.3.1.2 Solutions for buying a scooter

The solutions that were proposed to these problems involve the use of existing and new resources. Scooter users should:

- seek advice from community groups, online forums and review sites, retailers and independent advice organisations
- be aware of their own needs and capabilities
- try any product before buying it eg by making use of existing hire schemes (including Shopmobility).

Statutory and other bodies should:

- promote existing sources of information
- provide more consumer guidance and information, including product information
- emphasise the need for a proper assessment
- promote relevant accreditation schemes and standards.

Distributors and suppliers should:

- provide information about their product range
- provide full assessments
- join a suitable accreditation scheme (eg British Healthcare Trades Association).

5.3.2 Registration

5.3.2.1 Problems of registration

The problems associated with registering mobility scooters are that

- the legislation and available guidance about the legislation are confusing
- there is no obligation on dealers to inform buyers about their responsibilities
- there are practical difficulties surrounding the registration process and
- the legislation is not well policed.

The advice available from DVLA on which scooters need to be registered does not make it clear whether mobility vehicles weighing more than 113.4kg need to be registered if they are not intended to be used on the road, in other words whether a vehicle weighing more than that can be classified as a class 2 vehicle. Many dealers consider that a vehicle over this weight must be classed as a class 3 vehicle and therefore must be registered, but not all do.

It is also possible to buy a class 3 mobility scooter without being notified of the need to register it. Responsible dealers do give this information to their customers but others may not. Online retailers especially may not give this information. Retailers who took part in the workshop remarked that NHS wheelchair services do not register class vehicles when they provide them, or inform the user of the relevant legislation.

This can cause practical difficulties when a mobility scooter is being resold. A mobility scooter needs a Certificate of Newness from the manufacturer in order to be registered. This cannot be obtained for a second hand mobility scooter, so if the original buyer failed to register the scooter (or didn't register it because they bought it for use on private property) it is difficult or impossible to register it

to the new user. Reportedly, some manufacturers also fail to supply Certificates of Newness with their products.

De-registering and disposal

A further practical difficulty concerns the scrapping of mobility scooters when they reach the end of their life. In order to deregister a mobility scooter DVLA require a Certificate of Destruction, which can only be provided by an authorised treatment facility. These are focused on the treatment of motor vehicles, so they are usually unwilling to process mobility scooters. The consequence of this is that most mobility scooters are disposed of without being deregistered.

Enforcement of legislation

Policing the legal requirements affecting mobility scooter users is difficult, and inconsistent. It was felt that police and other authorities are not always fully aware of the legislation and that they may not treat it with the same degree of seriousness as for example motoring legislation. Policing the licensing of class 3 mobility scooters will become even harder when the tax disc is discontinued (expected to be October 2014).

Many workshop participants expressed the view that they couldn't see any purpose in requiring class 3 vehicles to be registered. Some felt that it could perhaps provide government agencies with data on the numbers of mobility vehicles in use. However, this data would be of limited use since it uncertain what proportion of class 3 vehicles is actually registered.

It was also pointed out that mobility scooters and wheelchairs have become heavier since the legislation was introduced. Many class 2 vehicles weigh more than 113.4kg and some class 3 vehicles weigh more than 150kg.

5.3.2.2 Solutions for registration

Some suggestions were made to improve the situation:

- providing better (clearer) information
- putting the responsibility for registration onto sellers of mobility scooters
- changing the weight limits for class 2 and 3 mobility vehicles.

However, most workshop participants were of the view that registration should simply be scrapped.

5.3.3 Safe use of mobility scooters

5.3.3.1 Problems of use of mobility scooters

It was agreed that there are a number of safety implications to the use of mobility scooters and they potentially present a hazard to their users and to other people around them. It was noted however that it is difficult to quantify the risk, since there is little or no data on the frequency of incidents. The involvement of mobility scooters in traffic collisions has not generally been recorded and neither have off-road incidents.

Issues affecting safe use were identified as:

- Training. What training is available? How can users access it?
- Policing. How is the use of mobility scooters policed?
- Presumed widespread use as leisure vehicles. What is the definition of a mobility scooter user?
- Insurance. How do users find out about it?
- The equipment. Stability and braking are not always reliable.
- Users. Users need to have their eyesight tested, and be aware of the effects of any medication they are taking.

5.3.3.2 Suggested solutions

Delegates recognised that there are existing training opportunities being provided by local and police authorities and other bodies. These work best when they have the involvement of the local community and of local retailers. Other opportunities for familiarisation are try before you buy schemes and mobility scooter hire schemes (eg Shopmobility).

There is also a section of the Highway Code for mobility scooters[13] and a sixteen page "Highway Code for Mobility Scooter Users" published by Road Safety GB.[14]

Delegates suggested these options should be promoted more vigorously, through local authorities, community groups, dealers and distributors and Mobility Centres, and that insurers might offer mobility scooter users incentives to attend training courses. Mobility Centres are often involved when people decide to stop driving because of a progressive condition or the effects of aging. They are well placed to promote local training and familiarisation initiatives.

Delegates were unanimous in opposing compulsory training, licensing and insurance.

5.3.4 Servicing and maintenance

Mobility scooters need occasional maintenance checks but do not commonly need to be serviced. They sometimes need repairs to worn or broken components including bearings, tyres and batteries. For some models this is practical, but many parts are sealed units and therefore unserviceable and replacement parts are not always available. This is exacerbated by the fact that many models are part of a relatively short production run and are soon superseded by other models.

Manufacturers also do not always supply information on how to service their products. If dealers are to carry out this work effectively they need information and training, which should be provided by manufacturers.

Ideally, manufacturers should be obliged to provide service and maintenance information and training, and to hold a stock of parts while a product line is current, and for a number of years after. It was acknowledged that this would be difficult to enforce.

Some retailers offer extended warranties to customers.

[13] https://www.gov.uk/rules-powered-wheelchairs-mobility-scooters-36-46
[14] http://www.roadsafetygb.org.uk/online-shop/62.html

5.3.5 Disposal (including resale and recycling)

Mobility scooters can be resold when no longer required. There are some issues concerning registration, which were outlined above. Some retailers offer part exchange schemes for people who want to replace or upgrade a mobility scooter. Some delegates mentioned a state-sponsored buy-back scheme that operates in the Netherlands.[15]

When mobility scooters are no longer serviceable, they need to be dismantled to allow the parts to be recycled. Many retailers perform this task, though it entails some cost to them. None of the parts have a commercial value and batteries especially are expensive to dispose of properly. Components are not usually marked with the materials they are made of, which makes recycling difficult.

As noted above, the registration requirement also makes scrapping of mobility scooters difficult.

Delegates suggested that better labelling of components would help with recycling. They also felt that there should be a national scheme or standard for the resale of used mobility equipment.

[15] Rica's research suggests this is in fact a long term loan scheme, rather than a buy-back scheme.

Appendix 1 List of stakeholders consulted

As part of this research project Rica has consulted with the following organisations:

- British Healthcare Trades Association
- Clearwell Mobility
- Disabled Ramblers
- DVLA
- Forum of Mobility Centres
- Institute of Advanced Motoring
- Kent Mobility
- London Borough of Bromley
- Motability Operations – Powered wheelchair & Scooter Scheme team
- Norfolk Constabulary
- Queen Elizabeth Foundation
- RSA Insurance Group
- TGA Mobility
- TPG Disableaids
- Which?

Appendix 2 Promotion of mobility scooter user survey

2.1 Distribution of paper copies

The following organisations distributed paper copies of the survey to their members/service users:

- Shopmobility schemes: Darlington, Fareham, Lewisham, Manchester and Sutton
- Mobility Centres in Surrey (QEF Mobility Services) and Norfolk (East Anglian DriveAbility)
- Nottingham Disabled Living Centre
- Age UK Kensington & Chelsea
- A GP practice in Mansfield

2.2 Promotion by other organisations

The following organisations promoted the survey on their websites or in newsletters or mailings to their membership:

- **Age Action Alliance:** email to members
- **Age UK London:** website feature
- **Age UK:** news website feature
- **Assist UK:** email to members (Disabled Living Centres)
- **Disability Rights UK:** Facebook feature
- **Disabled Living Foundation:** promotion through Youreable online forum
- **Disabled Motoring UK:** magazine article, link on website
- **Disabled Ramblers:** email to members
- **Foundation for Assistive Technology (FAST):** email to members
- **Information Now:** email newsletter
- **Mature Times:** website feature
- **Naidex 2014:** website feature
- **OXTAG Oxford Transport User Group:** email to members
- **Positive about MS:** via social media to members
- **THIIS:** website feature and email newsletter to members

2.3 Promotion to Rica contacts

In addition, Rica promoted the survey through our own Panels, newsletters and exhibition presence:

- Rica's national Consumer Research Panel and testing panel based near Milton Keynes
- At Moving and Handling People Exhibition in London
- Rica email newsletters in January and February
- Rica email update to networks eg disability and older people's organisations, and partners eg Mobility Centres.

Appendix 3 Mobility scooter user survey questionnaire

Rica, an independent research charity for older and disabled people, is carrying out this survey on behalf of the Department for Transport. We're interested in who is using mobility scooters and why.

You don't have to own a mobility scooter to answer - we want to hear from anyone who uses one regularly. This survey is anonymous, but if you're interested in participating in more Rica research you can leave your details at the end.

If you have any questions, please contact us:

- Email: **cassiebarton@rica.org.uk**
- Tel: **020 7427 2460**

Your mobility scooter use

Q1 How long ago did you start using a mobility scooter?

Under 6 months ..... ❑
6 months to 2 years..... ❑
More than 2 years ..... ❑

Q2 What were your reasons for starting to use a mobility scooter?

	Yes	No
To do shopping	❑	❑
To see more of family/friends	❑	❑
To get to work	❑	❑
To visit local places (eg cinema, pub, museums)	❑	❑
To go further afield (eg visiting countryside, day trips)	❑	❑

Q3 Has anyone helped you practice using a scooter?

	Yes	No
The retailer that sold it to me	❑	❑
Another organisation (eg local charity or police)	❑	❑

Think about the journeys you normally make using a mobility scooter.

Q4 Where do you normally use a scooter?

	Yes	No
Inside my home	❑	❑
Inside other buildings (eg shops)	❑	❑
On pavements	❑	❑
On roads	❑	❑
In parks or countryside	❑	❑

Q5 If you couldn't use a scooter, would you make the same journeys?
Yes, just as often ..... ❑
Yes, but less often ..... ❑
No, not at all ..... ❑

Q6 If yes, how would you make most of the journeys?

	Yes	No
Driving myself	❑	❑
Getting a lift from someone else	❑	❑
By public transport	❑	❑
By taxi	❑	❑
Walking	❑	❑

Other (please specify):

Q7 Have you ever had an incident on your scooter that has made you feel unsafe?
Yes ..... ❑
No ..... ❑

Q8 If yes, what happened?
_____
_____
_____

Q9 Do you take your scooter with you when travelling by...

	Often	Occasionally	Never
Car	❑	❑	❑
Taxi	❑	❑	❑
Bus	❑	❑	❑
Train	❑	❑	❑
Tram	❑	❑	❑

Q10 Do you have your own mobility scooter?
Yes ..... ❑
No ..... ❑

If you don't have your own scooter, skip to Q17. If you do, go on to the next section.

Q11 Which of these types of scooter do you own?
Boot scooter (dismantles to go in car boot) .....❑
Pavement scooter (bigger than boot scooter, for pavement use only)..... ❑

Road scooter (designed for road use - large, has lights and indicators)..... ❑

Q12 Which **one** of the types you own do you use most often?
Boot scooter..... ❑
Pavement scooter..... ❑
Road scooter..... ❑

Getting your mobility scooter

For the remaining questions, think about the scooter you use most often (ticked above).

Q13 When choosing your scooter, which of the things below were most important? Tick your top 3.
Easy to store..... ❑
Comfort..... ❑
Range ..... ❑
Design/appearance..... ❑
Price ..... ❑
Easy to lift/carry..... ❑
Can use on road..... ❑
Can take on public transport ..... ❑
Can fit in car boot..... ❑
Other (please specify):

Q14 Why did you choose a mobility scooter over a manual or powered wheelchair?

	Yes	No
N/A - I use a wheelchair as well as a mobility scooter	❑	❑
Scooters are cheaper	❑	❑
Scooters are easier to use	❑	❑
I prefer how scooters look	❑	❑
Scooters are more comfortable	❑	❑
It didn't occur to me to get a wheelchair	❑	❑

Other (please specify):

Q15 Did you get your scooter new or second-hand?
New ..... ❑
Second-hand..... ❑

Q16 Where did you get your scooter?

From a shop..... ❑
Online..... ❑
From a print advert..... ❑
From a friend/acquaintance..... ❑

About you

Q17 How old are you?

Under 45..... ❑
45 to 64..... ❑
65 to 74..... ❑
75 or over ..... ❑

Q18 Do you have a long-standing physical or mental impairment, illness or disability affecting any of the following areas?

	Yes	No
Mobility (e.g. difficulty walking long distances or climbing stairs)	❑	❑
Vision (e.g. blindness or partial sight)	❑	❑
Hearing (e.g. deafness or partial hearing)	❑	❑
Dexterity (e.g. difficulty lifting objects and using buttons)	❑	❑
Learning, understanding or concentrating	❑	❑
Memory	❑	❑
Mental health	❑	❑
Stamina, breathing or fatigue	❑	❑

Anything else?

Q19 If you have any other comments about using a mobility scooter, please write them here:

_____
_____
_____
_____

If you'd like to participate in other Rica research, write in your name and contact details below. You need to supply contact details if you want to be entered into the prize draw.

Q20 Name:

_____

Q21 Email address:

_____

Q22 Phone number:

_____

Don't contact me unless I win the prize draw..... ❑

Appendix 4 Agenda and delegate list for class 3 mobility scooters workshop

Friday 28th March 2014, 14.00-17.00

Delegates

Name	Organisation
Elena Barcan	Department for Transport
John Cuthbertson	Disabled Ramblers
Mark Phillips	DVLA[16]
Tim Shallcross	Institute of Advanced Motoring
John Payne	Kent Mobility
Sharon King	Kent Mobility
Rosina Denton	London Borough of Bromley
April French	LB Bromley
Dave Bushby	Motability
David Law	Norfolk Constabulary
Sarah Vines	Queen Elizabeth Foundation
Jasper Holmes	Rica
Chris Lofthouse	Rica
Robin Helby	Scooter user/Disabled Ramblers
Tim Ross	TGA Mobility

Agenda

14.00	Arrive for refreshments
14.15	Introductions, about Rica
14.30	Rica mobility scooter user survey
14.45	Mobility scooters – the state of the market
15.00	Workshop exercise 1 – identifying the issues
15.45	Break
16.00	Workshop exercise 2 – identifying the solutions
16.45	Concluding remarks
17.00	End

[16] DVLA did not attend in the event.