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Disabled Drivers;

A Neglected Community?

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Disabled Drivers:

A Neglected Community?

'Disability', 'ageing', 'pensioners' and 'living longer' are words too often glossed over, but they represent an ever growing proportion of the population. Some of these words may never apply to us as individuals – others are almost inevitable. On the positive side, they can lead to inclusiveness and identify business opportunities, on the less positive side; they may require awareness and support.

Consider some too often ignored facts;

- In the United Kingdom there are over 6.9 million disabled people of working age – 19% of the working population. Half the disabled community are over retirement age.
- In 1983 the population aged over 65 was 15%, by 2008 that had grown to 16% - an increase of 1.5 million – by 2033, given current trends, it will be around 23% of the national population.
- One in 20 children under the age of 16 in the United Kingdom has a disability.

While members of the disabled community certainly do not all have special mobility needs, as a group, it is demanding more social and economic inclusion – and represents massive, growing purchasing power.

A key component of the Equality Act, which came into force on 1st October 2010, is ensuring that an individual's health is not a discriminating factor in the services they can access or their employment. Yet they are still part of a community that isn't always served effectively by major companies.

Report Objectives

This short report has three principal objectives which might be summarised as follows;

- To identify the principal market segments within the disabled community for adapted vehicles and wheelchair accessible vehicles.
- To present the findings of a small, professional mystery shopping telephone and email exercise among the major daily rental companies with regard to rental station awareness of adapted rental vehicle availability.
- To suggest some implications and how these might be addressed by rental companies to give disabled people greater personal mobility.

The research in no way seeks to allocate blame or shame; it is the result of a small piece of mystery shopping undertaken in second quarter 2011 among major rental companies.

The Special Needs Rental Market

Realistically, nobody knows the exact size of the market for special needs rental vehicles. However, some basic statistics may help in identifying an order of magnitude for the sector. In the United Kingdom, 3.2 million people receive the Disability Living Allowance and there are probably countless other mobility impaired people who would be able to benefit from special needs rental – whether they drive themselves or the vehicle is used on their behalf.

The mobility adaptations required can run from ‘nothing’ – the vast majority – through simple adaptations to controls, to serious vehicle reconfiguration for wheelchair accessibility – tail lift or direct access. Motability, the charity which provides cars for those with mobility issues reputedly has in excess of 17,000 wheelchair adapted vehicles as well as a significant number of units with lesser adaptations.

A relatively small proportion of cars and LCVs used by people with disabilities have significant adaptations and the bulk of these modifications are, essentially, relatively easy to fit and remove by expertly trained staff. The challenge is, however, to know what adaptations are required and to be able to provide not only the modifications but also to have the skills to fit and remove these adaptations.

Realistically the special needs daily rental market might be split into the following principal segments;

- Self-drive/adapted vehicle market – people requiring self-drive adapted units; such vehicles might typically require hand controls to replace foot controls or have modifications for steering or automatic transmission. The former adaptations can normally be fitted to conventional rental cars and are designed to be removable at the end of a rental. The key to success is the skill to determine what the driver requires and how the temporary, removable modification should be safely fitted.
- A second category might be easy access vehicles; that could, at the simplest be an LCV with steps or handholds to assist passengers in entering and leaving the vehicles.
- The third group, the most heavily adapted units, are so called WAVs – wheelchair accessible vehicles. These units are expensive; the adaptations may include dropped floors so wheelchairs can be driven into them and clamped. They may also include either side or tail lifts to place the wheelchair and passenger in the vehicle. Within this category, the bulk of rental vehicles would be driven by a third party – a friend or a member of the family, a carer or a specialist driver.

Rental arrangements might be made by the individual disabled driver or by a friend or relation who would drive the adapted or accessible vehicle on their behalf. In terms of rental use, there would appear to be an increasing mobility need with an expanding proportion of the growing disabled population expecting to be ‘taken out’ either by friends or family, if they are unable to drive themselves.

This is a growing population and is likely to continue to grow with changing demographics, more people disabled from accidents and surviving as well as soldiers and others returning from conflicts.

Equally important, disabled people are becoming more self confident and willing to be seen in public – and expect to be treated the same as the able bodied community.

One could write pages on the different affinity groups – children giving parents a treat, charities seeking to offer an excursion or a day out for disabled people. The list is almost endless.

But one issue can be of real concern. How do disabled people access vehicles suitable for their needs on a short-term basis?

Mystery Shopper Research

A mystery shopping exercise was conducted among a number of national daily rental companies regarding their awareness and product offering for people with disabilities.

The exercise was very simple, objective and highly professional. The parameters of the exercise can be summarised as noted below;

- Mystery calls were made UK-wide by a panel of home based callers. The team included male and female callers with a wide range of accents and ages. The callers were selected for their listening skills, initiative, objectivity – judged in their ability to distinguish subjective from objective reporting; attention to detail, impartiality and their ability to write accurate and constructive reports.
- A parallel email exercise to ensure accuracy with regard to the send and received times seeking responses to the same questions was undertaken with emails sent to three different locations for each brand. .
- The scenarios presented to the enquiries were as noted below;

Scenario 1; customer had no movement in or no right leg and thus required an automatic vehicle with a left foot accelerator fitted.

Scenario 2; the customer had no use of their legs and thus required a vehicle with a push/pull hand control and a steering ball.

Scenario 3; Customer was in a wheelchair and was looking to hire a vehicle which had been modified to allow them to remain in the wheelchair while travelling and have another person to drive the vehicle for them – a wheelchair accessible vehicle or WAV.

Each of these scenarios is a relatively common one within the disabled community and regular modifications are available for each of the scenarios.

The mystery shoppers between them called fifteen rental stations belonging to the major daily rental networks – 1-3 each. An additional four follow-up calls were made as suggested by the initial respondents.

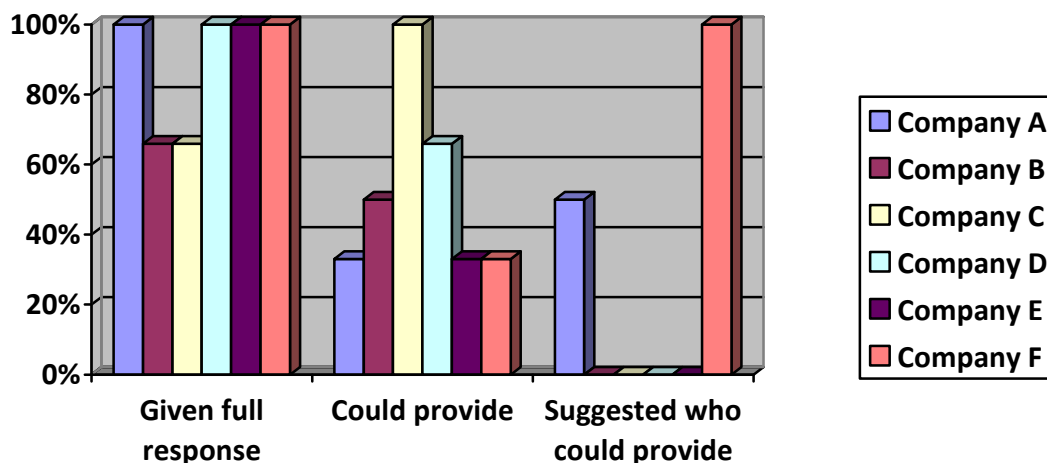
The researchers made contact with airport rental operations as well as with town and city rental stations, to provide a wide distribution and these, in turn, were spread geographically.

Research Findings

As mentioned previously, this is not a blame game but an objective and hopefully constructive awareness report so responses by individual sites or brands have not been identified in these results.

To reproduce all of the responses in a short report would detract from the principal objective of showing an overview. However, the main findings might be summarised as noted below;

Email Research



The chart above provides an indication of the responses received to the mystery shopper emails. These enquiries were sent to a standard pattern.

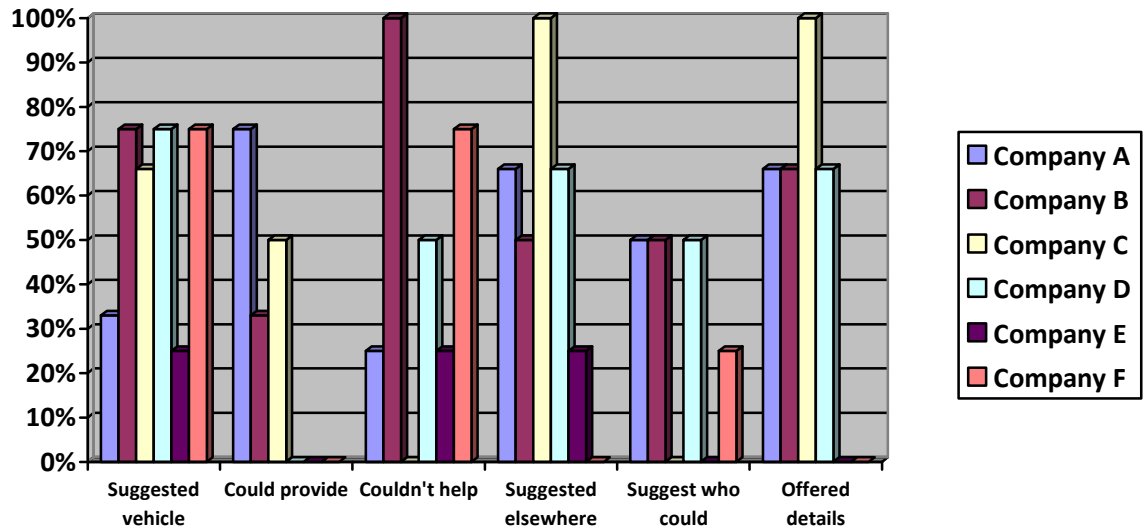
- 4 out of 6 of the email respondents provided a full response to the email questions posed. In the other two cases, one email – a 1 out of 3 of response potential – attracted either no response or failed to provide relevant information.
- The second email indicator – ‘could provide’ 1 out of 6 sets of emails from the target company indicated they could provide a vehicle; the other respondents were much patchier.
- In terms of suggesting an alternative supplier if they were unable to offer a service, one respondent offered a contact in all cases.

A verdict? ‘Could do better’ might be a polite response but, bearing in mind these were email requests with the requirements carefully spelt out, a more positive set of responses might have been expected. Perhaps the most concerning issue arising from this stage of the mystery shop was the apparent lack of understanding of the respondents to the emails – one might assume such staff would be familiar with their product offering and any specialist support services, such as adapted vehicles, that could be offered. Responses to the emails might well be described as ‘patchy’

There was a feeling, reading the responses, of ‘this is not my problem’ in a lot of cases and the issue was passed either up – or down – the information chain to central booking/head office/local branch – depending upon the email respondent.

How did this compare with the Mystery Calling – the telephone research? The notes below provide some pointers.

Mystery Call Research



Within the calls scenario, the highly-experienced callers were asked to judge the responses. The following comments summarise their objective analyses of the results;

- 3 out of 6 brands suggested vehicles which might possibly be suitable to a greater extent; however, of the three calls to two brands, only one in each case was judged to have offered an acceptable answer
- The proportion of respondents which could provide the vehicles they suggested – the second block of responses – was restricted to 3 out of 6 sets of respondents.
- However, the third block of the paradigm suggests there was a significant response of ‘unable to help’ – at least they tacitly admitted the issue.
- In the fourth question – suggested seek rental elsewhere – the responses were more positive even if they did not actually suggest a contact.
- The number of responses offering a contact number or organisation was again ‘patchy’ as suggested by responses to the last two questions.

A verdict? There is a clear need amongst disabled people but, overall it was felt the respondents failed to advise and offer an appropriate rental product – despite the rental companies having access to such vehicles.

While it would appear the majority of players contacted had an arrangement with a specialist adapted rental vehicle supplier, this did not apply to all rental agents contacted, whether in central rental reservations or in local offices.

Mystery Shop and Email Research Implications

A number of conclusions might be extracted from the mystery shopper survey and email study which have quite serious implications for disabled people and the aged community. The disabled community are voracious email and electronic communication users and any good – or bad - knowledge is passed very quickly around the community. Plus, for the organisations that are not addressing these issues effectively, there might be a risk of infringing Equality Act legislation.

The key implications include:

- Loss of opportunity for independence and mobility for disabled people and the aged community; especially important as provision could be made through one of the specialist adapted vehicle rental companies if the unit is not available in house
- Special needs rental is generally not a spontaneous request but can be booked in advance and, as such, it should be practical for disabled people and their carers to be able to arrange this in advance
- Rental agent and email agent lack of product and disability awareness training – or lack of interest in handling less common and more complex rental requests – can make disabled people and the aged community feel marginalised

The responses to the mystery shop activity were not consistently good or bad across the brands surveyed – and a small sample as used here is insufficient to offer a clear quantitative assessment of the results – better to call them ‘patchy at best’.

However, the overall implications are clear – there is a ‘need to do better’.

Strategic Actions

While some players have emerged well from the mystery shop, four immediate recommended strategic actions might be identified from the above comments.

- Rental Agent Disability & Disabled Product Awareness Training; results were clearly patchy. While it might be a major task to train all rental and email agents to be able to offer professional support and guidance to potential disabled customers or those calling on their behalf, it would be desirable for maybe each rental station – and certainly central reservations – to have staff with specific disability management and support training. Within the franchised dealer industry, Motability dealers have trained specialists; is there any reason why such a policy, over a year, cannot be introduced as a matter of urgency within the daily rental sector? Over time, disability training could be introduced in all staff training.
- Website Development; update websites to be clearly inclusive of information on disability-suitable and adapted products. It may be possible and practical, to introduce some form of interactive questionnaire to assist disabled people, their family, friends and carers to be able to complete as part of the rental enquiry

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- Brochures and promotional material; if not already available, might be developed specifically to include disability information with reference to the type of support available for users and prospects.
 - Links to specialist adapted vehicle providers; even for the biggest daily rental companies, in-house immediate availability of adapted vehicles is likely to be impractical and uneconomic. Therefore, rental companies need to link to those specialist providers and ensure customer facing staff are aware.

The universal model developed and implemented by Motability has been mentioned previously and has developed a powerful network of specialists to advise disabled car drivers and users on the most suitable products. Is there any reason why a parallel service is not more widely offered for special needs daily rental vehicles?

Some Initial Conclusions

A small mystery shop survey and a parallel email enquiry exercise can offer little more than a snapshot of a market situation. However, as a wakeup call for the dynamic rental company, it offers a clear indication of the need to address better this growing section of the community.

As important, two issues are of concern for the special needs renter or person having a vehicle rented for their use - availability and awareness. A positive attitude for such benefits are inestimable – I know, I'm a disabled driver.

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