Scooters and Mopeds - US - December 2012

Scope and Themes

"The scooter and moped market has benefited from the increase in gas prices since the start of the recession in 2008. This may not be enough to expand this market in the U.S. significantly, but has generated interest among consumers who had previously never considered them or just seen them as a recreational or lifestyle vehicle."

- Bill Patterson, Senior Market Analyst

In this report we answer the key questions:

- **Can the U.S. market emulate those countries with ingrained scooter/moped culture?**
- **Is marketing scooters/mopeds as lifestyle accessories a mistake?**
- **How does the "new normal" of rising fuel prices create a new potential consumer base**

This report provides an in-depth examination of the U.S. scooter and moped market for manufacturers, dealerships, and marketers interested in better understanding the moped and scooter consumer, to explore innovations and trends within segments, and to evaluate the competition.

The report explores how the rise in fuel prices across the country has forced consumers to consider buying a scooter or moped, either as a replacement for their car or truck, or as an extra vehicle for short trips around town. As rising fuel prices become the "new normal," they will likely become a significant factor in helping transition hesitant consumers to becoming potential buyers.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

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To date, the U.S. scooter and moped market remains niche when compared to the markets in Europe and Asia, where these vehicles are embraced by the mainstream as affordable and reliable options to navigating dense urban areas. Since the design of most American metropolitan areas tends to accommodate cars and trucks better than small motor vehicles, U.S. consumers more often turn to other forms of transportation when looking beyond the car: public transit, bicycling, walking.

As a result, scooters and mopeds are mainly considered leisure vehicles for weekend or general recreation use. While the drop in fuel prices is helping move consumers onto these vehicles and away from their cars or trucks, manufacturers still face the challenge of general acceptance.

Besides fuel economy, manufacturers are promoting their scooter and moped brands as lifestyle accessories rather than vehicles used solely for practical purposes such as long commutes, shopping, or weekend traveling. These manufacturers have tapped into the cultural cachet of scooters/mopeds shared among a segment of the buying public that values their vintage European design and can energize sales by other factors that make these brands unique: one-of-a-kind color combinations, cargo features, and accessories. Whether this is the right approach to engage a potential customer is challenged based on the results of the consumer research for this report.

Consumer research in this report shows what factors motivate scooter or moped owners to purchase their respective vehicles and how those same factors matter (or don't) once they have made their purchase. Do priorities change once aspiring buyers become owners? What do consumers perceive as the best use of these vehicles and does that change dependent on gender, age, household income, or even where they live? These questions reveal the delicate line consumers straddle when entering this market in choosing between convenience and recreation, or embracing both.

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