NMEDA

Automotive Mobility Solutions

National Mobility Equipment Dealers Association

www.nmeda.com

Awareness & Usage Study

April 2011

Background, Objectives & Methodology

National Mobility Equipment Dealers Association
NMEDA

- The National Mobility Equipment Dealers Association (NMEDA) commissioned evok/Mindspot to conduct research to help understand the competitive marketplace for their association.

- The analysis searched to uncover the following:
  - Measure awareness of NMEDA and the services they provide.
  - Determine where opportunity exists in key attitudes, decision criteria, influential and lifestyle factors that are components in the decision process to purchase a vehicle modification.

- We conducted 406 online interviews.
  - Understanding decision influencers may differ, interviews were balanced between 152 mobility device users age 18-64, 151 users age 65+ and 103 primary caregivers.
  - The US Census Bureau estimates that 16% of people 5+ claim some type of disability*. However, mobility specific issues on this sample indicated an approximate incidence of 3%-5%.
  - Respondents who received the survey last year did not receive the survey this year.

- Screening criteria and timing is consistent with the survey from last year. Interviews were screened to either require the use of a mobility assistance device or be the primary caretaker/decision maker for an individual who does.

*2008 projection –demographic profile 2010 data is scheduled to release in May 2011

Conclusions

National Mobility Equipment Dealers Association
NMEDA

- Perceptions regarding how **useful** NMEDA is or could be are rising, with significantly more people in 2011 finding NMEDA useful. 7 out of 10 people believe the services NMEDA provides are extremely or very useful.
  - After being exposed to NMEDA's mission, nearly all consider NMEDA's services to be useful in some capacity.
  - Once the word gets out, the value NMEDA provides is apparent to both people with disabilities and caregivers.
  - And, unique – no one (even those believing NMEDA may not be useful) this year thought another organization or company could provide the services NMEDA provides.

- There are few gains made in increasing awareness of NMEDA's services and the services they provide -
  - Just under 1% of respondents were able to recall NMEDA without being prompted by a description and name.
  - After being given a description or prompted, 8% claimed to have heard of NMEDA and this is statistically unchanged from the previous survey.

- Once exposed to NMEDA the likelihood to recommend NMEDA increased to 45% promoters from 32%. This is a positive indicator.

Conclusions

National Mobility Equipment Dealers Association
NMEDA

- More people are purchasing vehicles modifications from a QAP accredited dealer (40% in 2011 vs. 31% in 2010) and their overall satisfaction has increased significantly (85% in 2011 vs. 71% in 2010).

- The Internet is becoming an increasingly utilized tool in providing people with health care information.
  - A notable jump in online research was observed from last year. More people are doing their own research on the Internet versus asking health care professionals.
  - 73% of people in 2011 are using the Internet regularly to obtain health information.
    - This is up significantly from 64% in 2010.
  - Similar to last year two-thirds of those asked utilize the Internet “all of the time” for research.
  - Those aware of NMEDA from Internet sources increased over 2010.
  - The majority are also active on social networking sites, predominantly Facebook.
    - Nearly half of those asked have clicked on a Facebook ad or become a Fan.

- Publications have a smaller (although more targeted) audience.
  - Magazine awareness is one out of three (31%), which is significantly lower than the reported awareness for this measure in 2010 (37%).

Recommendations

National Mobility Equipment Dealers Association
NMEDA

- Clearly delivering NMEDA's mission to targeted consumers will likely continue to increase the perception that the organization is useful.
  - Any additional communication of the mission in consumer messaging will be beneficial.

- It appears there may have been efforts to associate NMEDA with QAP and QAP dealers which is making an impact. However, the benefits appear to be to the dealers in particular (rather than benefitting organizational awareness). This is a good thing for an organization to do and we recommend continuing to promote QAP and NMEDA together due to the dealer benefit.
  - More people are purchasing vehicle modifications this year from QAP dealers (40% vs. 31% respectively) and their overall satisfaction with their purchase has increased significantly (71% to 85%). This is a very notable increase.
  - When asked to rank importance for their most important purchasing criteria – the percent ranking NMEDA and/or QAP accredited dealer doubled in importance (8% up from 4%).
  - The importance of dealer advertising is increasing and consumers are considering dealer advertising when making the purchase decision.
  - The possible double association of QAP and NMEDA may be the reason the awareness metric has not increased for NMEDA and importance has increased for QAP.
    - This may be what is most important to the consumers in the message - they may be associating dealer QAP as the most relevant content and it may also be easier to recall.

Recommendations

National Mobility Equipment Dealers Association
NMEDA

- Those aware of NMEDA may have remained statistically unchanged, but the recall of how they are aware of NMEDA changed. More people learned of NMEDA over the internet this year (35% vs. 42%). Those searching for information from health sites increased (73% up from 64% as previously mentioned), and even though the number was very high initially for people to research their purchase prior to purchasing – it increased again this year. And, those researching a purchase online also increased (23% vs. 20% in 2010).

- Caregivers and users 18-64 show similar Internet usage patterns, with “All of the time” increasing for both groups.

- The majority of those asked are on Facebook and nearly 8 out of 10 age 18-64 are there. Half of those asked click on Facebook advertising banners or join a Fan page.
  - Vie for prominent placement on websites dealing with disabilities. Social groups, small web forums, and search engines.
  - Consider partnering with more well known non-profit organizations, which also provide health and other relevant, useful information. Based on the cause of the disability captured in this survey it is clear that chronic illness, age, accidents, and birth defects are key reasons for mobility challenges.
  - Some suggested partnerships and websites to advertise on are: NMSS, MSAA and the Christopher & Dana Reeve Foundation.

Recommendations

National Mobility Equipment Dealers Association
NMEDA

- For older consumers, there is recall on an aided and unaided basis of AARP. This is where these Insurance providers are becoming more important to people during the purchase process. Both the AARP and Facebook saw significant gains in traffic in only 12 months.
  - Perhaps additional marketing efforts with AARP should be considered. This would be beneficial for NMEDA being the less recognized brand.
  - Even if they cost more – they are worth more.

- Print media is lessening in potential customer exposure. This is a significant difference over only a 12-month period. It illustrates how the consumers are in charge of their access to information and this is consistent with the other metrics captured in this survey. As a relevant part of the media mix, it is clear that online is relatively more important now than last year.
  - Consider lessening your print media budget, and/or narrowing the budget to publications with the largest number of subscribers and this way you can still maintain a presence .

- It is clear in this study that in terms of Lifestyle satisfaction this year people are significantly less satisfied. They rate their overall health lower and are expressing more dissatisfaction with their current situation. This is consistent with the trends in this study about people looking for quality, being more careful and contentious and less budget conscious even if they are very careful with their money or even struggling. There is a clear regard for caution and taking the time to improve their quality of life and there is an indicator that when they are less satisfied with their health they may have **even more desire to do things to improve their quality of life, mobility and freedom.**

Recommendations

National Mobility Equipment Dealers Association
NMEDA

- Continue reaching out using all available channels and focus on health care sites, affinity groups and social networking on the Internet.
  - The Internet is showing an increasing and definable trend among users and caregivers in many areas.
  - Usage, notably those 65+ are using the Internet in their free time more than those 18-64 and this is likely due to more available time.
  - Researching health related issues increased significantly in only a 12-month time frame. Again, NMEDA/QAP accreditation is showing a significant increase from the previous year indicating it is becoming more important in the purchase decision.

- Notably, the importance of budget dropped significantly, while most other factors are largely unchanged. Younger users are more likely to shop online. Visiting a dealership in person is still the most likely method, followed closely by shopping online, which increased over last year to 7 out of 10 people.

- Visit a mobility dealership increased 4% over last year to 75%.

  - Unique – there is a perception that no other organization, company, or individual can provide the services NMEDA provides.

Recommendations

National Mobility Equipment Dealers Association
NMEDA

- Very positive increase in the number of promoters showing the potential strength of the NMEDA opportunity is increasing.
- More people once they learn about NMEDA are likely to recommend NMEDA this year indicating the more the word gets out at some point there may be a “tipping point” in terms of awareness.
- Continue efforts to get the word out and promote how unique NMEDA is in terms of the information they provide.

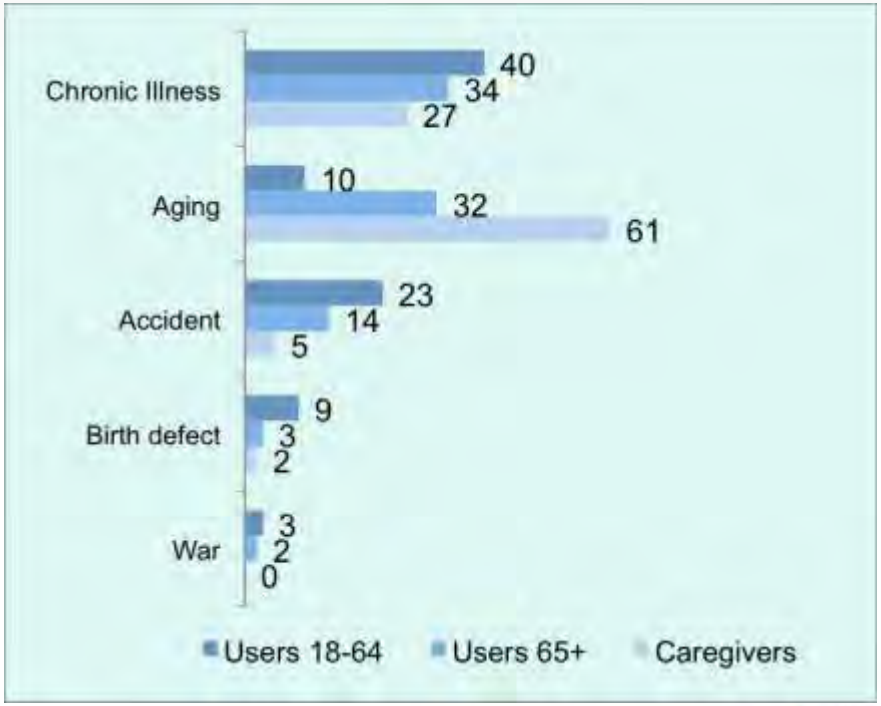
About Those Interviewed

About Those Interviewed

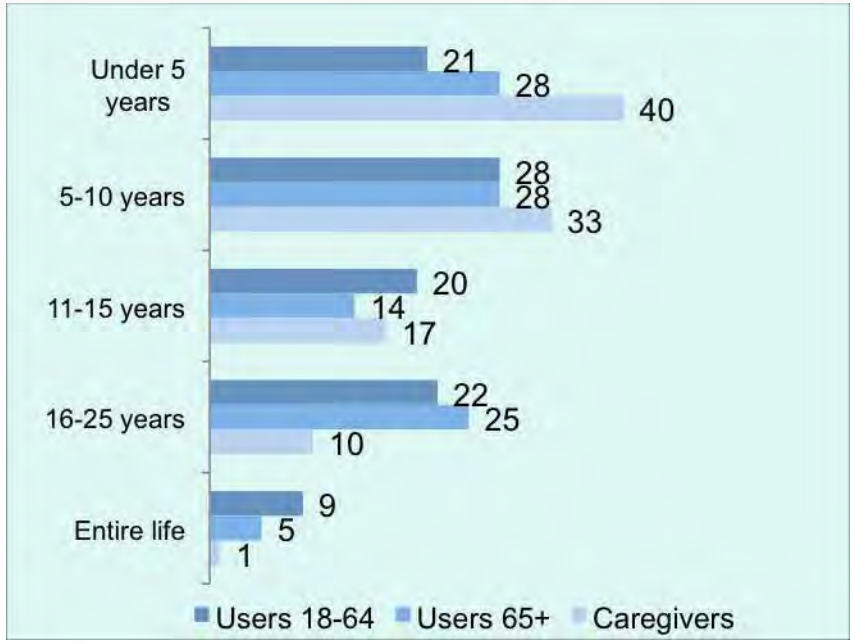
National Mobility Equipment Dealers Association
NMEDA

- Many caregivers are responsible for newly disabled individuals, most suffering from the effects of aging.
- The primary cause of disability for the younger interviews is chronic illness, such as strokes, multiple sclerosis (MS), or Parkinson's disease.

Cause of Disability (%)



Length of Disability (%)



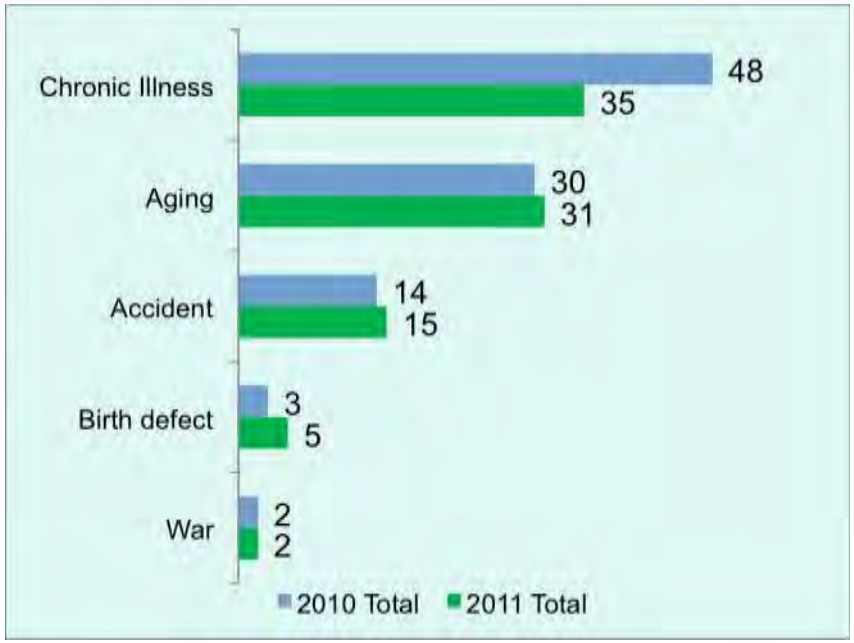
Base: 2011 Total Interviews
Q31) What is the cause of the disability for yourself/the person you care for?
Q31a) How long have you/has the person you care for had this disability?

About Those Interviewed

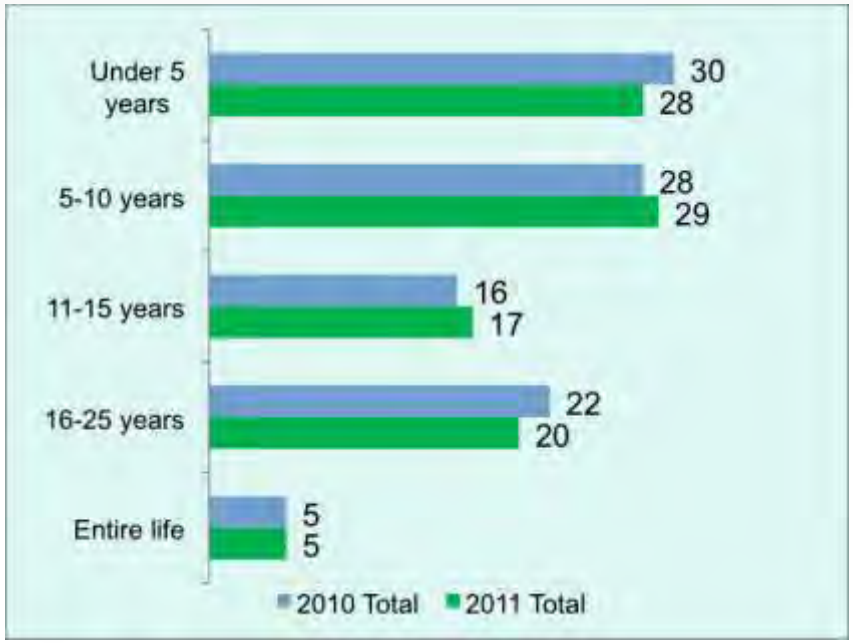
National Mobility Equipment Dealers Association
NMEDA

- The disability cause and duration remains similar from 2010 to 2011.
- Chronic illness is still the most prominent cause of disability.

Cause of Disability (%)



Length of Disability (%)



Base: Total Interviews
Q31) What is the cause of the disability for yourself/the person you care for?
Q31a) How long have you/has the person you care for had this disability?

About Those Interviewed

National Mobility Equipment Dealers Association
NMEDA

- Caregivers are typically caring for an older family member, most often parents.
- 4 out of 5 caregivers are caring for someone using a wheelchair as a mobility device.

Mobility Devices Used (%)	Users 18-64	Users 65+	Care givers
Wheelchair	49%	36%	78%
Scooter or powerchair	42%	36%	26%
Walking aid (cane/walker)	24%	37%	13%
Vehicle Modifications (NET)	**23%**	**21%**	**27%**
Seating & restraints	7%	6%	13%
Rear lift for scooter transportation on the vehicle exterior	6%	6%	7%
Acceleration & Braking aids	5%	2%	2%
Steering aids	4%	3%	3%
Lift into main vehicle cabin	7%	4%	6%
Lowered floor conversion vehicle	4%	2%	3%
Electronic controls	3%	2%	4%

Caregivers Relationship (%)

Base: 2011 Total Interviews
Q31b) Which of the following mobility aids do you/does the person you care for currently use?
Q32) What is your relationship with the person you care for?

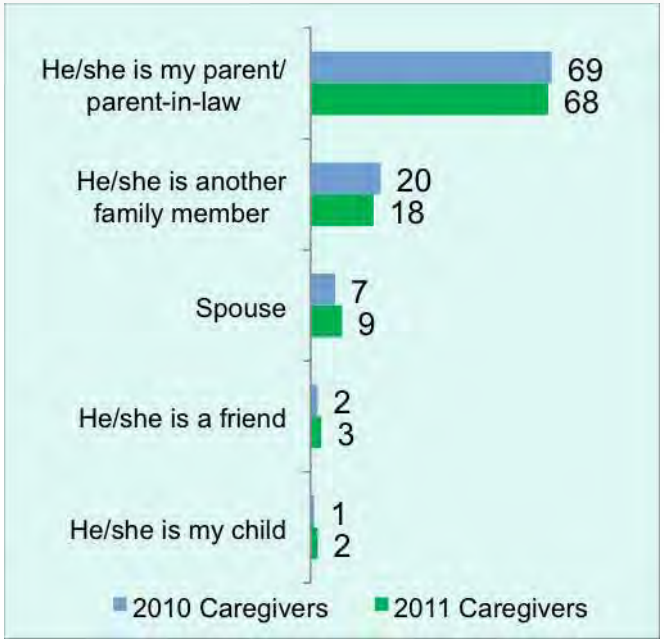
About Those Interviewed

National Mobility Equipment Dealers Association
NMEDA

- The ratio of mobility devices used remained the same between years. Wheelchair usage is slightly higher this year compared to last year.
- Caregivers are still most often caring for their aging parents.

Mobility Devices Used (%)	2010 Total	2011 Total
Wheelchair	46%	51%
Scooter or powerchair	35%	36%
Walking aid (cane/walker)	28%	26%
Vehicle Modifications (NET)	**24%**	**23%**
Seating & restraints	9%	8%
Rear lift for scooter transportation on the vehicle exterior	6%	6%
Acceleration & Braking aids	6%	3%
Steering aids	5%	3%
Lift into main vehicle cabin	5%	5%
Lowered floor conversion vehicle	4%	3%
Electronic controls	3%	3%

Caregivers Relationship (%)



Base: Total Interviews
Q31b) Which of the following mobility aids do you/does the person you care for currently use?
Q32) What is your relationship with the person you care for?

About Those Interviewed - 2011

National Mobility Equipment Dealers Association
NMEDA

H.H. Size (%)	Users 18-64	Users 65+	Care givers
2	65%	85%	50%
3	19%	7%	29%
4+	16%	8%	21%
Avg.	2.7	2.4	2.9

Employment Status (%)	Users 18-64	Users 65+	Care givers
Employed	32%	13%	70%
Not Employed	68%	87%	30%

Financial Comfort (%)	Users 18-64	Users 65+	Care givers
Struggling to make ends meet	28%	15%	17%
Must be careful with spending	46%	40%	50%
Comfortable/ Doing well	27%	45%	33%
Avg. Income	$60,560	$63,970	$70,150

Gender (%)	Users 18-64	Users 65+	Care givers
Male	26%	36%	25%
Female	74%	64%	75%

Ethnicity (%)	Users 18-64	Users 65+	Care givers
Caucasian	93%	93%	90%
Other	7%	7%	10%

Region (%)	Users 18-64	Users 65+	Care givers
Midwest	28%	17%	35%
South	18%	28%	17%
Northeast	36%	25%	31%
West	18%	29%	17%

Education (%)	Users 18-64	Users 65+	Care givers
< College	49%	40%	30%
College Grad+	51%	60%	70%

Base: Total Interviews

About Those Interviewed

National Mobility Equipment Dealers Association
NMEDA

H.H. Size (%)	2010 Total	2011 Total
2	63%	68%
3	17%	17%
4+	20%	15%
Avg.	2.8	2.6

Employment Status (%)	2010 Total	2011 Total
Employed	38%	35%
Not Employed	62%	65%

Financial Comfort (%)	2010 Total	2011 Total
Struggling to make ends meet	25%	20%
Must be careful with spending	40%	45%
Comfortable/ Doing well	36%	35%
Avg. Income	$62,930	$64,260

Gender (%)	2010 Total	2011 Total
Male	35%	30%
Female	65%	70%

Ethnicity (%)	2010 Total	2011 Total
Caucasian	91%	92%
Other	9%	8%

Region (%)	2010 Total	2011 Total
Midwest	30%	26%
South	28%	22%
Northeast	21%	31%
West	21%	22%

Education (%)	2010 Total	2011 Total
< College	39%	41%
College Grad+	61%	59%

Base: Total Interviews

Competitive Landscape

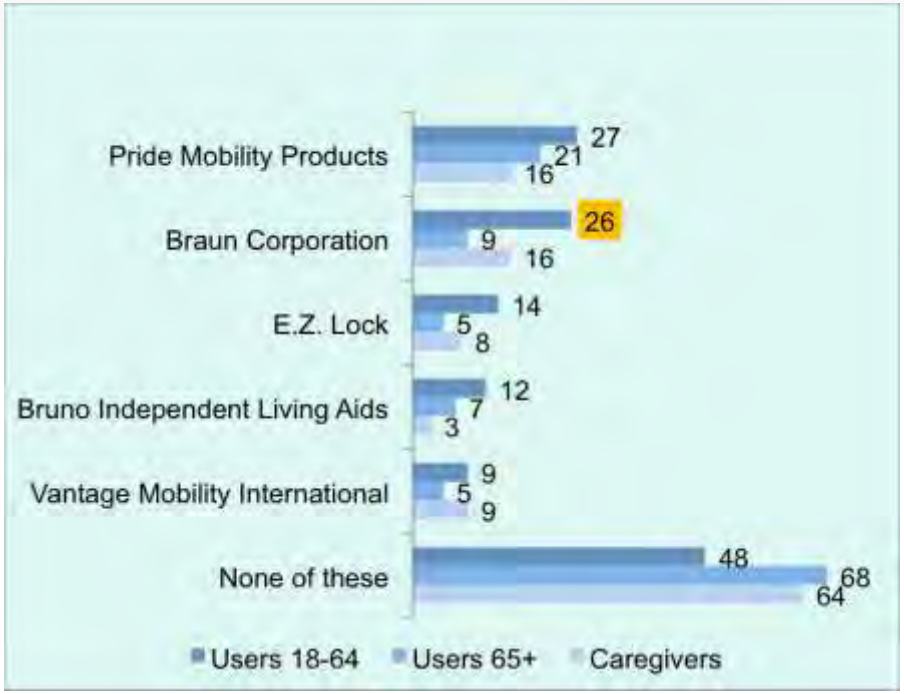
Competitive Landscape

National Mobility Equipment Dealers Association
NMEDA

- Unaided awareness among companies providing vehicle modifications is low.
- Braun has significantly higher awareness among the younger age group compared to 65+ users and caregivers.
- Users 18-64 in general have more awareness than 65+ users or caregivers.

Unaided Awareness (%)

Total Awareness (Top % Mentions)



Base: 2011 Total Interviews
Q1) First, please list all the companies you are aware of that provide automotive transportation solutions…
Q2) Please look at the list below and select each of the companies you are aware of

*Orange = Significant at 90% c.i. across groups

Competitive Landscape

National Mobility Equipment Dealers Association
NMEDA

- Both unaided and aided awareness remains consistent with 2010.
- Although less people chose “none” from the list, there is still an opportunity to improve awareness for any company that provides transportation solutions.

Unaided Awareness (%)

Total Awareness (Top % Mentions)

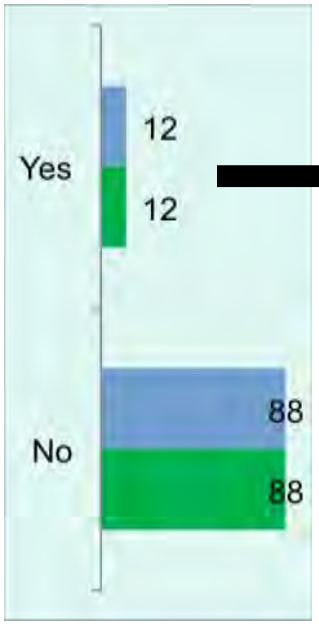
Base: Total Interviews
Q1) First, please list all the companies you are aware of that provide automotive transportation solutions…
Q2) Please look at the list below and select each of the companies you are aware of

Competitive Landscape

National Mobility Equipment Dealers Association
NMEDA

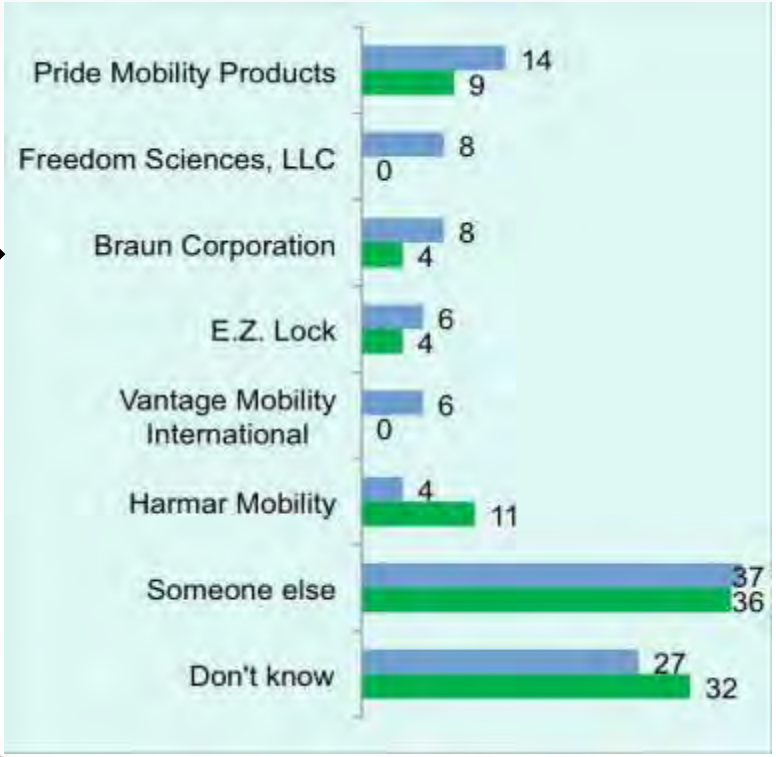
- Purchasing held steady in 2011 with 12% of respondents purchasing a modified vehicle or vehicle modification.
- There was a slight rise in repeat purchasers versus new purchasers.
- Harmar Mobility saw a notable increase from 2010.

Made Purchase Past 12 Months (%)



First Purchase (%)

Purchased From (%)



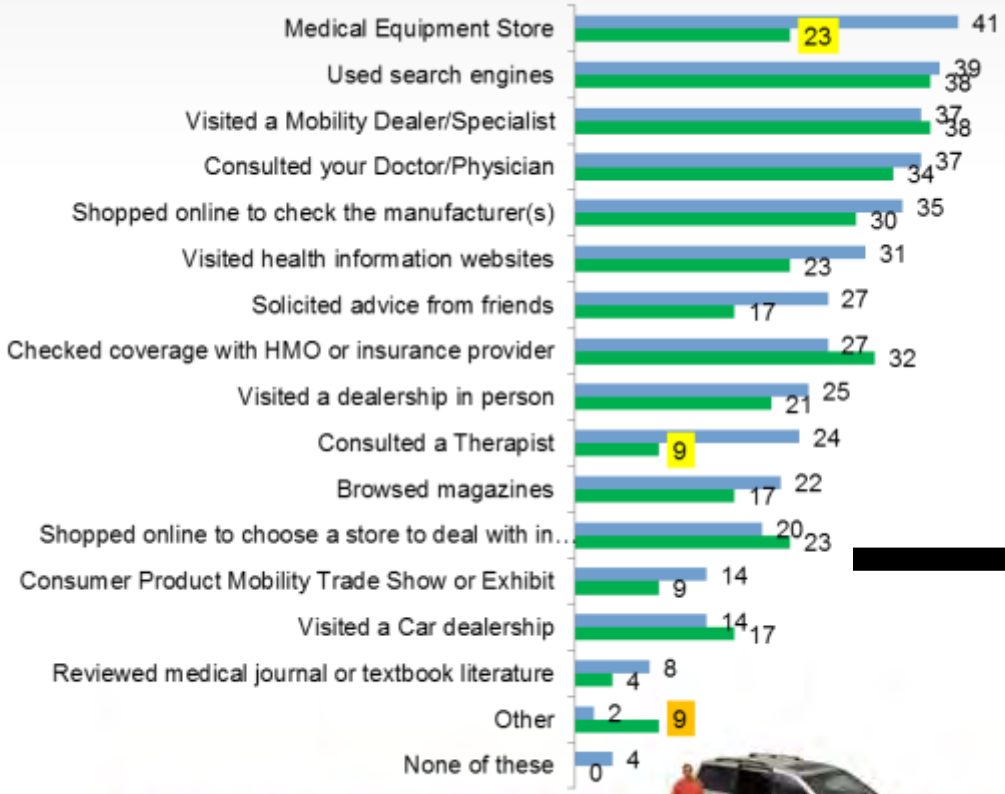
Base: Total Interviews
Q3) In the past 12 months, have you purchased a vehicle modification or newly modified vehicle?
Q4) Was this your first purchase of a vehicle modification or newly modified vehicle to aid transportation?
Q5) From whom did you purchase your vehicle modification or newly modified vehicle?

Competitive Landscape

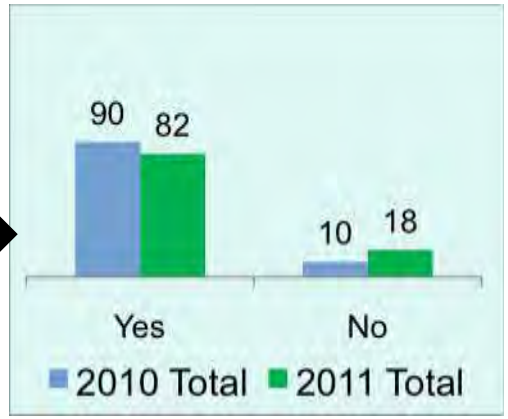
National Mobility Equipment Dealers Association NMEDA

- There are changes in the way people are researching their purchases.
  - Fewer people are shopping in a medical store.
  - It **appears** fewer people are consulting their therapist (see next slide).**
  - There was a small increase in those checking with their insurance provider.

Research Methods (%)



Chose Company Researched (%)



Base: Purchased Modification In P12M
Q6) What did you do to research your purchase?
Q7) Did you choose a company that you researched on the Internet?

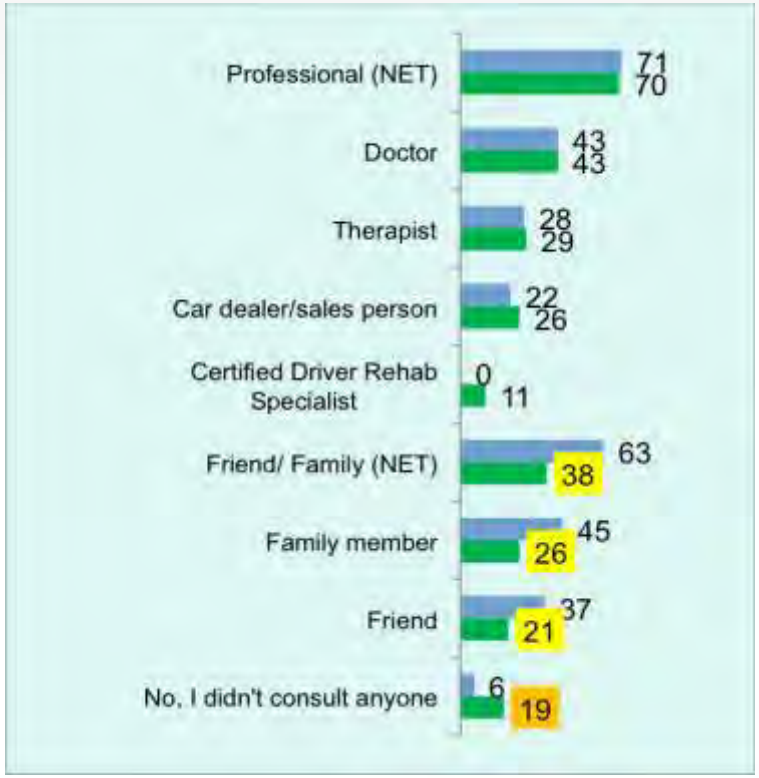
*Orange = Significantly HIGHER at 90% c.i. across groups
*Yellow= Significantly LOWER at 90% c.i. across groups

Competitive Landscape

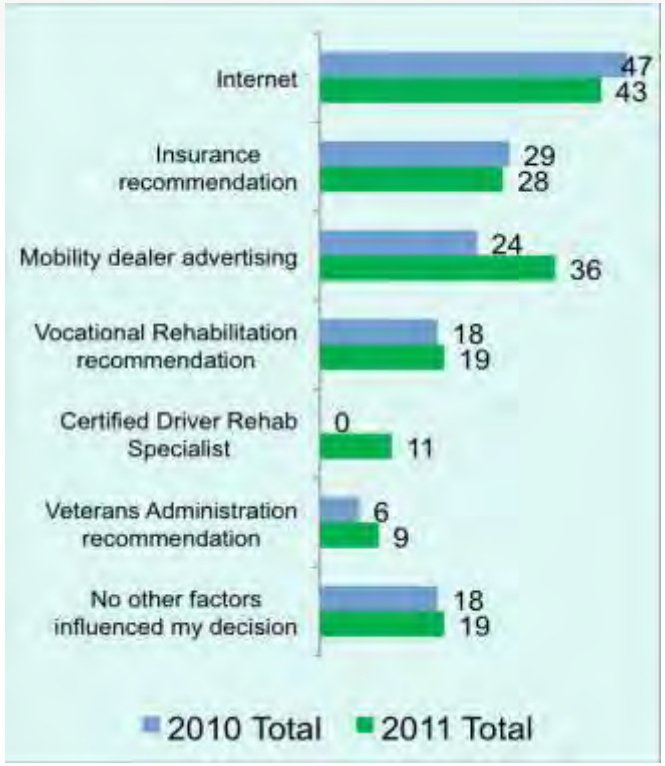
National Mobility Equipment Dealers Association
NMEDA

- Friends and family appear to be playing a smaller role in the purchase decision relative to last year.
- Therapist was chosen by 29% of the responders.

Consultations (%)



Other Influencers (%)



Base: Purchased Modification In P12M
Q7a) Did you consult anyone before obtaining your mobility equipment?
Q7b) What other factor(s) influenced your decision?

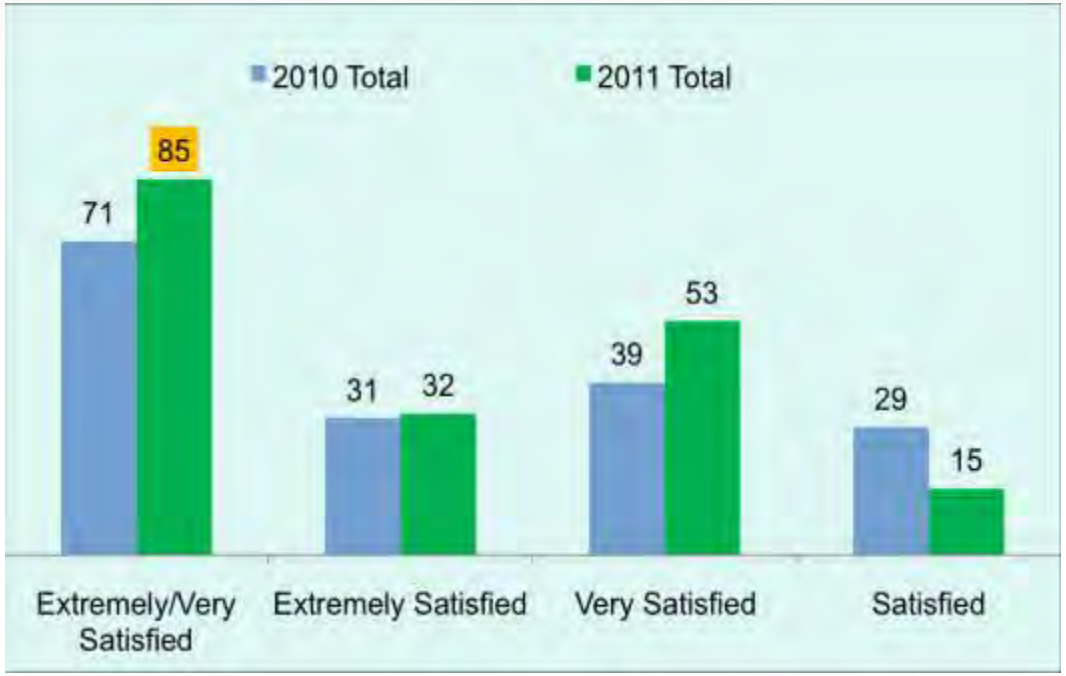
*Orange = Significantly HIGHER at 90% c.i. across groups
*Yellow = Significantly LOWER at 90% c.i. across groups

Competitive Landscape

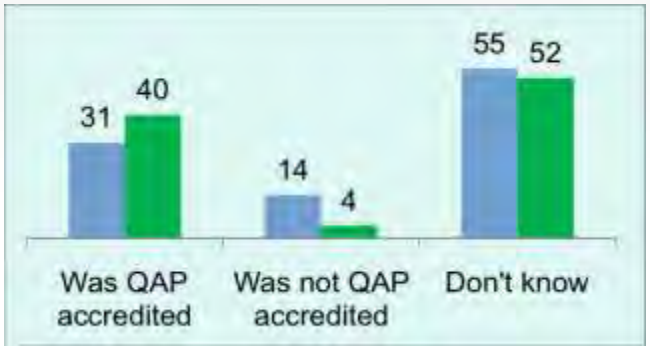
National Mobility Equipment Dealers Association
NMEDA

- More people are purchasing vehicles modifications from a QAP accredited dealer (40% in 2011 vs. 31% in 2010) and their overall satisfaction has increased significantly (85% in 2011 vs. 71% in 2010).
- This is a key metric and positive changes are notable.

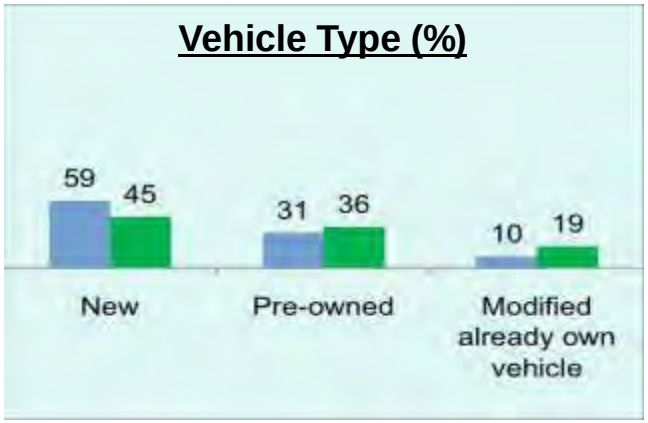
Overall Satisfaction (%)



QAP Accreditation (%)



Vehicle Type (%)



Base: Purchased Modification In P12M
Q8) Overall, how satisfied were you with your vehicle modification or newly modified vehicle?
Q9) Do you know if your dealer is QAP (Quality Assurance Program) accredited?
Q10) Was the vehicle new, pre-owned, or did you make modifications to a vehicle you own?

*Orange = Significant at 90% c.i. across groups

Perceptions of NMEDA

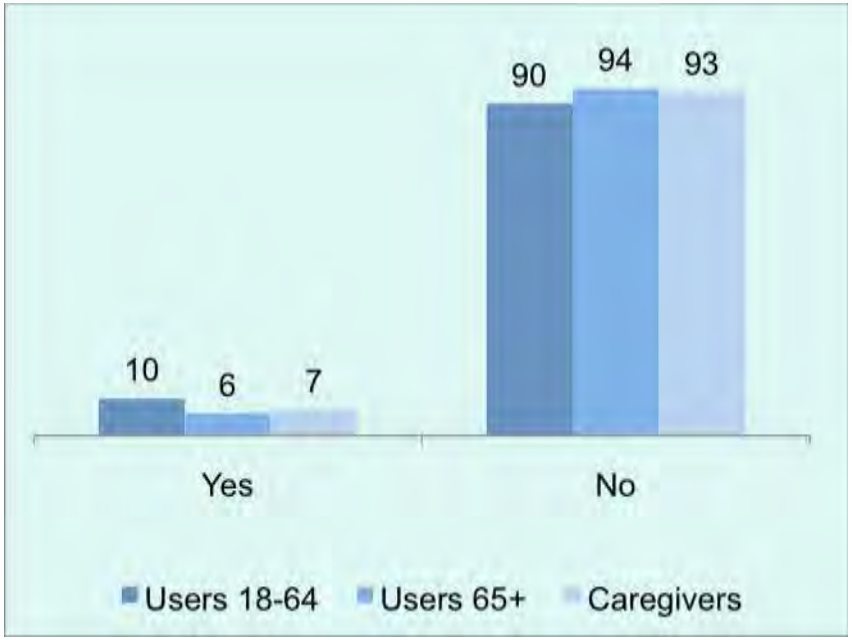
Perceptions of NMEDA

National Mobility Equipment Dealers Association
NMEDA

- NMEDA awareness is still low and just under 1% of respondents were able to recall NMEDA by name.
- When aided, few were aware of the organization itself, with 8% awareness.
  - Least aware were those users 65+.

Unaided Awareness (%)

NMEDA Aided Awareness (%)



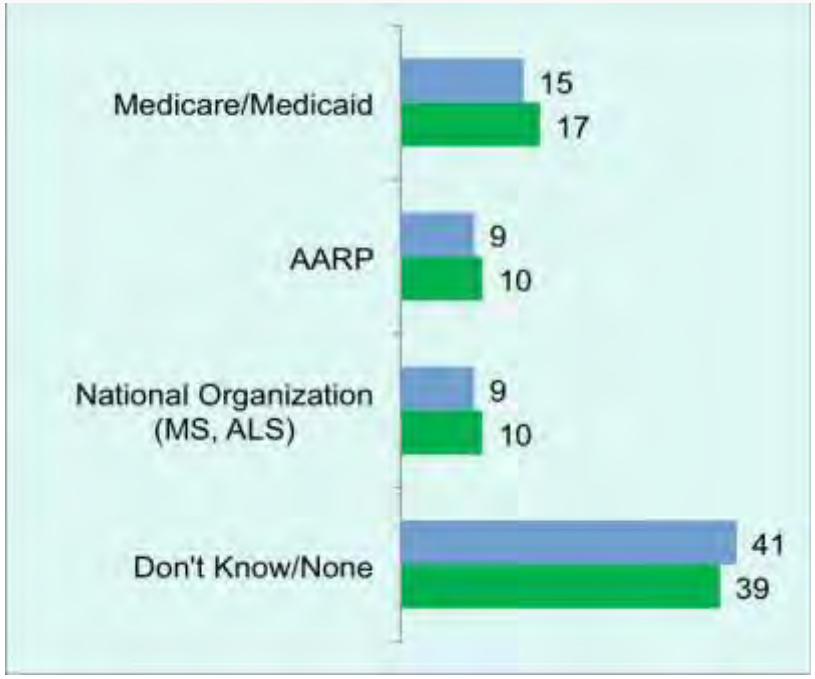
Base: 2011 Total Interviews
Q11) What organizations or programs can you think of …
Q11a) Have you ever heard of NMEDA, the National Mobility Equipment Dealers Association?

Perceptions of NMEDA

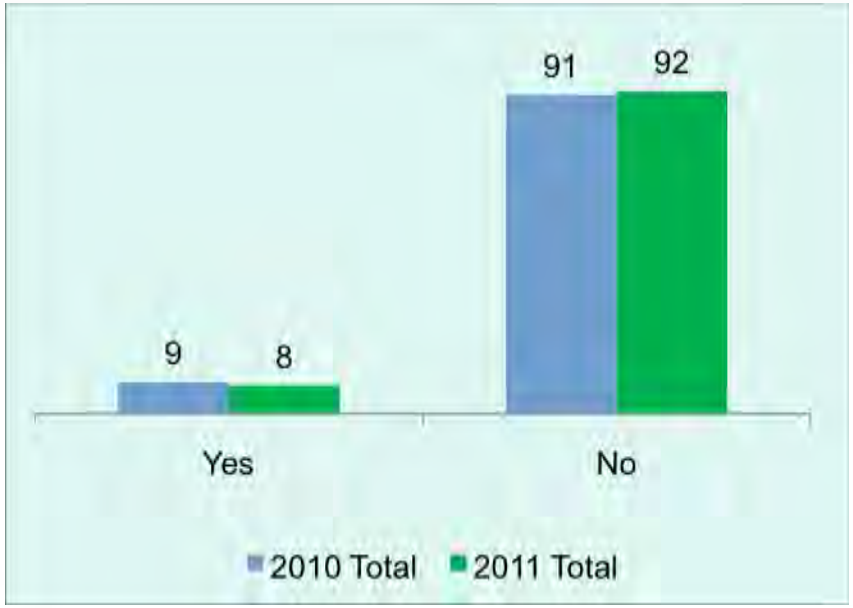
National Mobility Equipment Dealers Association
NMEDA

- Aided and Unaided Awareness is unchanged from 2010 (no statistical difference).
  - Users and Caregivers may be associating QAP with NMEDA dealers and they purchased more QAP certified vehicles & modifications. Overall satisfaction increased, and the positive perception NMEDA is useful increased significantly.

Unaided Awareness (%)



NMEDA Aided Awareness (%)



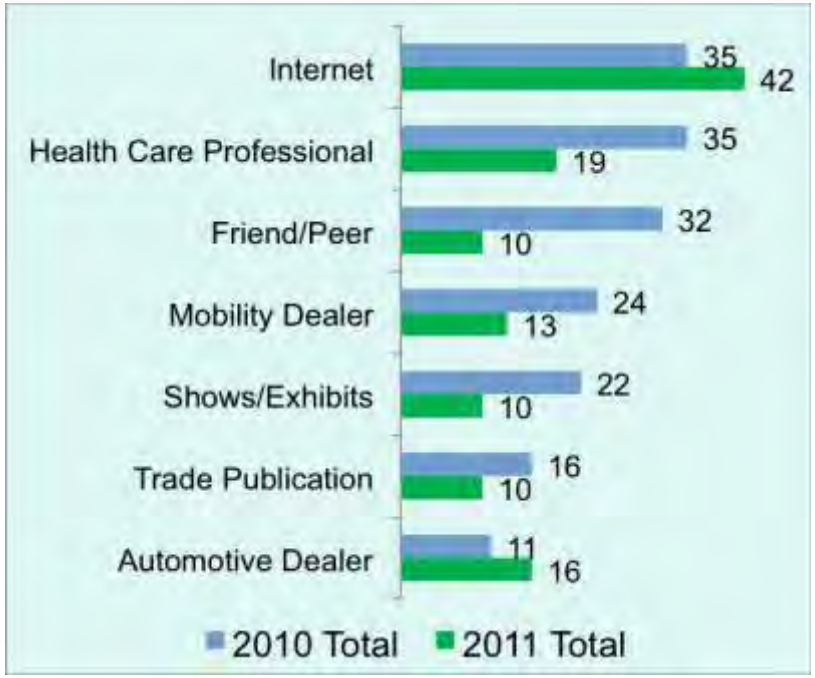
Base: Total Interviews
Q11) What organizations or programs can you think of …
Q11a) Have you ever heard of NMEDA, the National Mobility Equipment Dealers Association?

Perceptions of NMEDA

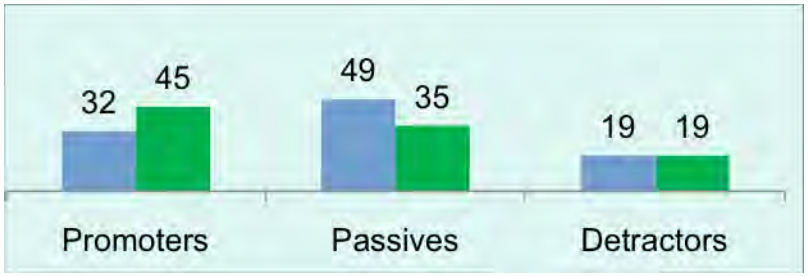
National Mobility Equipment Dealers Association
NMEDA

- Very positive increase in the number of promoters showing the potential strength of the NMEDA opportunity is increasing.
- Automotive dealers show a notable increase, pointing to perhaps increased use of the QAP accreditation in their marketing efforts or by NMEDA or a combination of the two.
- The Internet is becoming even more important.

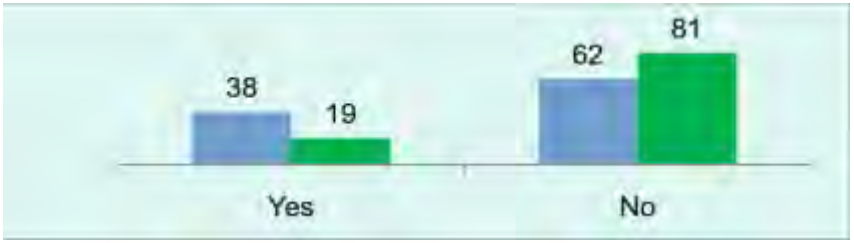
Information Source (%)



Would Recommend (%)



Used NMEDA (%)



Base: Aware of NMEDA
Q13) Where did you learn about NMEDA?
Q12) Have you ever used NMEDA's services, or the services of a NMEDA member dealer?
Q13a) How likely would you be to recommend NMEDA or a NMEDA Dealer?

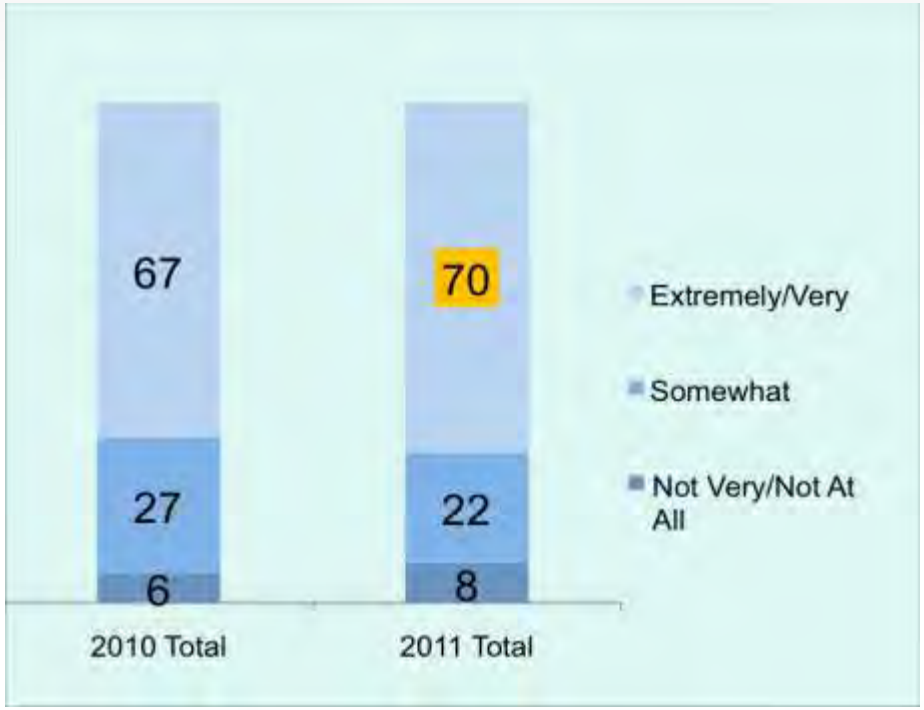
*Small bases

Perceptions of NMEDA

National Mobility Equipment Dealers Association
NMEDA

- NMEDA's positive perceptions are increasing with more people in 2011 finding it extremely or very useful, which is a significant increase in 12 months.
- Unique – there is a perception that no other organization, company, or individual can provide the services NMEDA provides.

Usefulness (%)



Why Useful	2010 Total	2011 Total
Good resource / provide useful information	18%	18%
Assistance / guidance to make informed decisions	13%	16%
Provide help for the disabled	11%	15%
Why Not Useful		
Don't need their services	40%	38%
Don't know of company / never heard of	24%	38%
These services can be provided by other organizations (doctor/insurance company/etc.)	8%	0%

Base: Total Interviews
Q14) How would you rate the usefulness of the services provided by NMEDA?
Q15) Why do you say the services provided by NMEDA are …?

*Orange = Significant at 90% c.i. across groups

Purchase Decision Process

Purchase Decision Process

National Mobility Equipment Dealers Association
NMEDA

- NMEDA/QAP accreditation is showing a significant increase from the previous year indicating it is becoming more important in the purchase decision.
- The importance of budget dropped significantly, while most other factors are largely unchanged.

Importance In Purchase Decision

(% Extremely/Very Important)

% Most Important	2010	2011
Provides service/repair in a timely manner	6%	4%
Has high quality vehicles/modifications	19%	18%
Dependable warranty	6%	6%
Has trained and experienced staff	7%	7%
Fits within your budget	25%	17%
In-person equipment evaluation for you	8%	8%
NMEDA/NMEDA QAP accredited dealer	4%	8%
Low price	11%	13%
Provides funding or financing assistance	9%	10%
Located close to you	2%	3%
24-hour service	3%	4%

Base: Total Interviews
Q16a) For the following, please rate how important each is to you when deciding …
Q17) Please rank the attributes in order of Importance

*Orange = Significantly HIGHER at 90% c.i. across groups
*Yellow = Significantly LOWER at 90% c.i. across groups

Purchase Decision Process

National Mobility Equipment Dealers Association
NMEDA

- Younger users are more likely to shop online.
- Caregivers are more likely to shop in person and at car dealerships, probably because of their lack of mobility limitations.
- Age plays a factor in traveling to save money, with Users 65+ significantly less likely to do so.

Research Methods (%)

% Very/Somewhat Likely	Users 18-64	Users 65+	Care givers
Would Buy Online Without Driving	7%	3%	5%
Would Travel Outside Local Area To Save Money	61%	50%	62%

Base: 2011 Total Interviews
Q18) How likely would you be to buy a vehicle online without test driving it first?
Q19) How likely would you be to travel outside your local area to save money on the conversion or chassis?
Q20) Which of the following would you do to research your purchase?

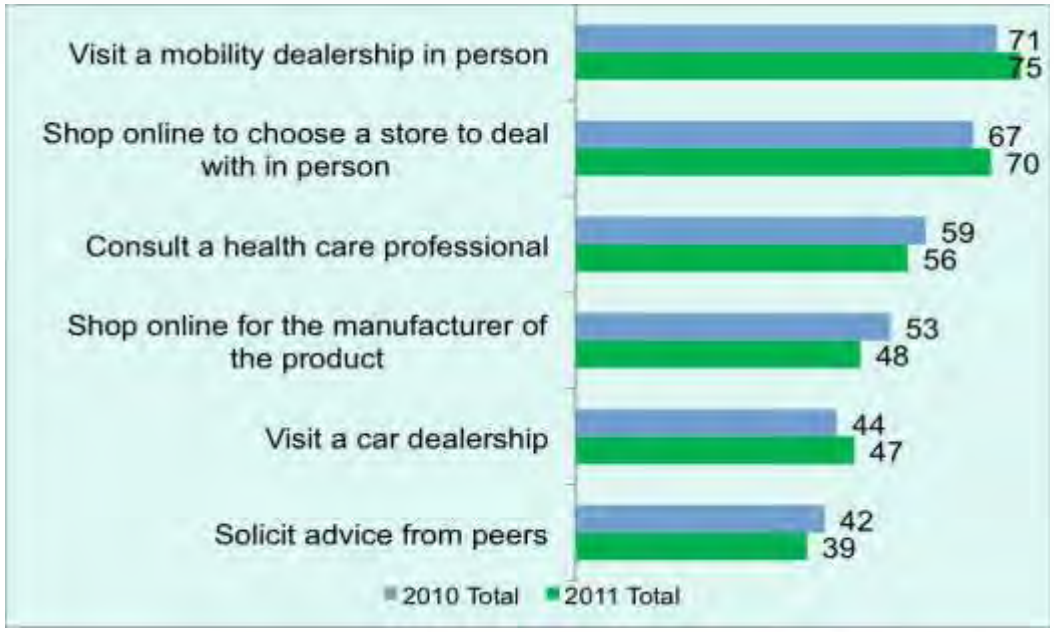
*Orange = Significant at 90% c.i. across groups

Purchase Decision Process

National Mobility Equipment Dealers Association
NMEDA

- There were no differences in research methods from last year.
  - Visiting a dealership in person is still the most likely method, followed closely by shopping online, which increased over last year to 7 out of 10 people.
  - Visit a mobility dealership increased 4% over last year to 75%, which is notable.
- In 2011, fewer asked would buy online without driving. This is good news for NMEDA dealers.

Research Methods (%)



% Very/Somewhat Likely	2010 Total	2011 Total
Would Buy Online Without Driving	9%	5%
Would Travel Outside Local Area To Save Money	59%	57%

Base: Total Interviews
Q18) How likely would you be to buy a vehicle online without test driving it first?
Q19) How likely would you be to travel outside your local area to save money on the conversion or chassis?
Q20) Which of the following would you do to research your purchase?

*Yellow = Significantly LOWER at 90% c.i. across groups

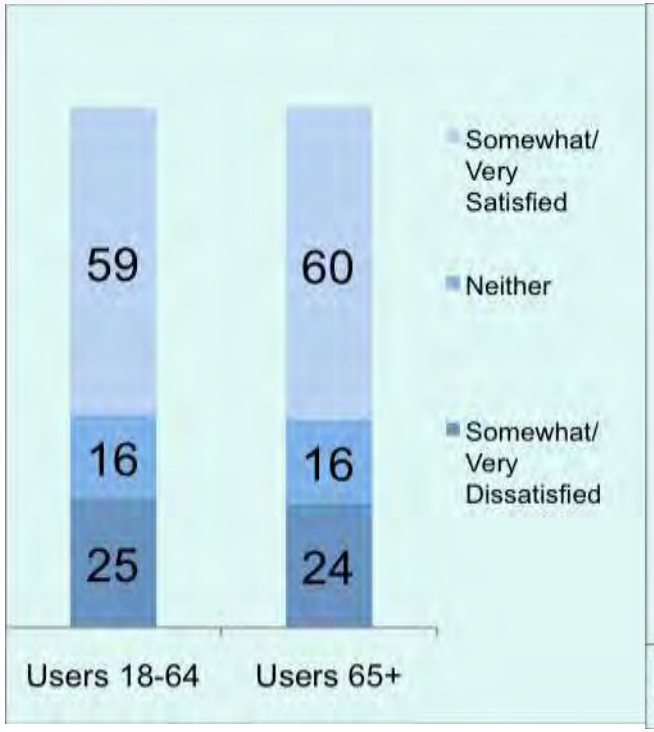
Health and Lifestyle

Health and Lifestyle

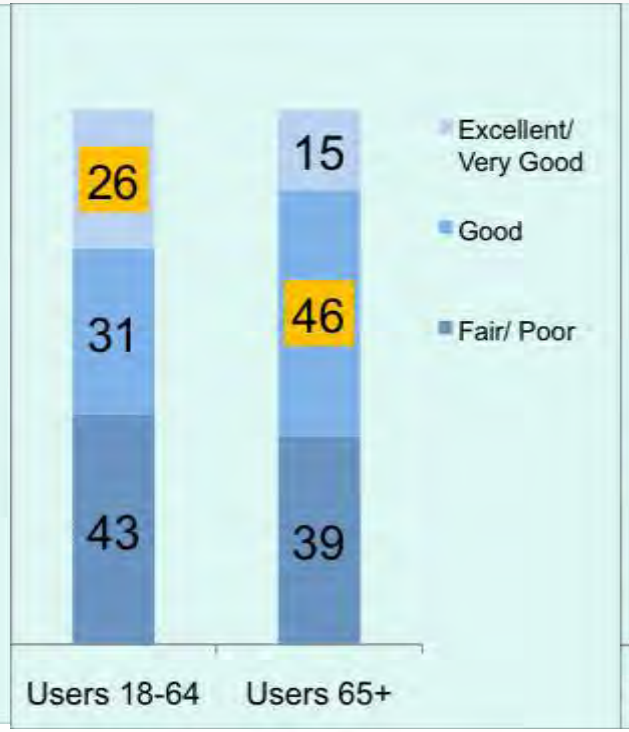
National Mobility Equipment Dealers Association
NMEDA

- Those 18-64 are significantly more satisfied with their overall health than those 65+.
- Independence and the ability to be active correlates to a higher satisfaction with their lifestyle.

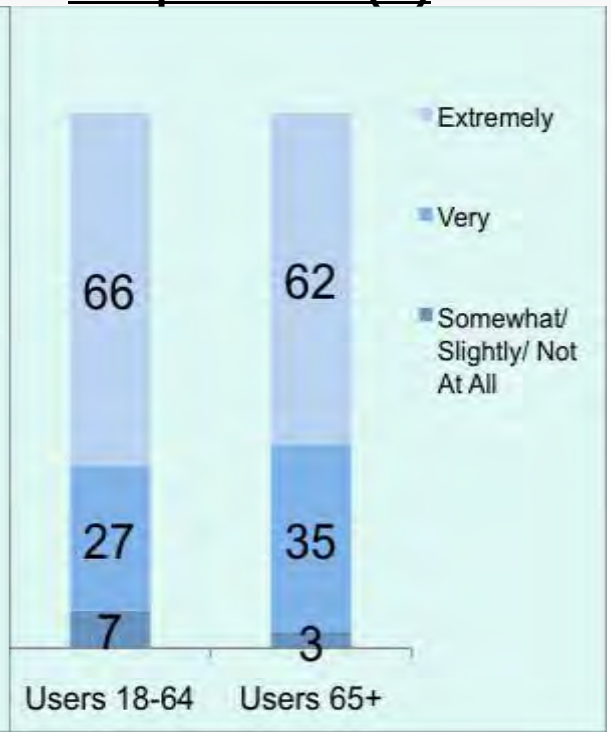
Lifestyle Satisfaction (%)



Overall Health (%)



Importance of Independence (%)



Base: 2011 Users
Q21) Overall, how would you rate your satisfaction with your current lifestyle?
Q22) Overall, how would you rate your general health?
Q27) How important is your physical independence to you?

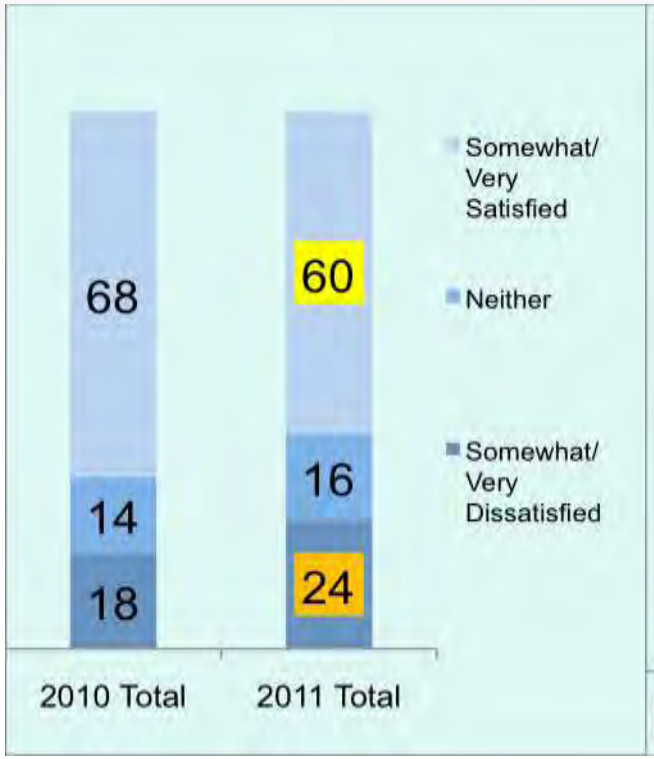
*Orange = Significant at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

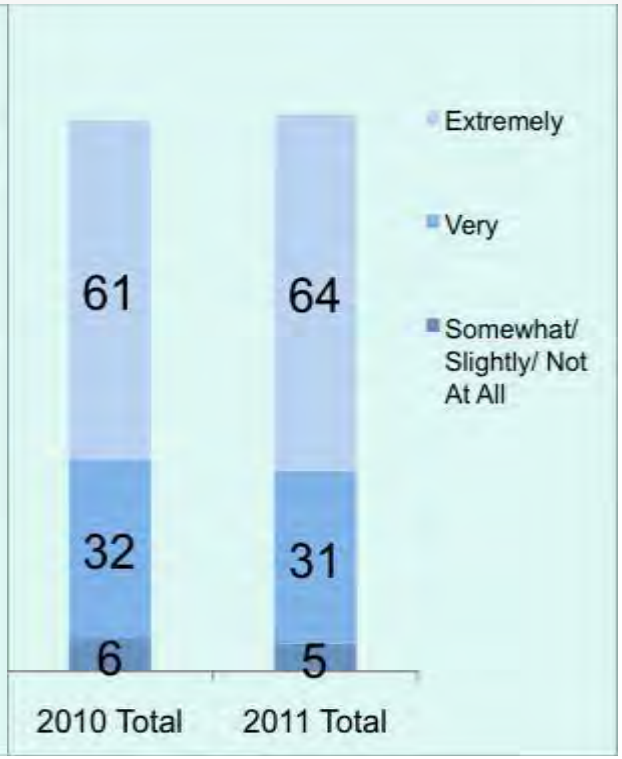
- People seem less satisfied with their lifestyle this year compared to 2010.
- Overall health is also down a little.
- The importance of independence increased under these conditions.

Lifestyle Satisfaction (%)



Overall Health (%)

Importance of Independence (%)



Base: Users
Q21) Overall, how would you rate your satisfaction with your current lifestyle?
Q22) Overall, how would you rate your general health?
Q27) How important is your physical independence to you?

*Orange = Significantly HIGHER at 90% c.i. across groups
*Yellow = Significantly LOWER at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- Although Medical Professionals are the most used resource for all asked, they are more often utilized by older users.
- Almost half of users 65+ regularly consult with their pharmacist.

Health Information Sources (%)	Users 18-64	Users 65+
Medical Professionals (NET)	**91%**	**96%**
Doctor/Physician	86%	90%
Pharmacist	32%	45%
Websites (NET)	**74%**	**72%**
Health information websites	57%	52%
Search engines	45%	49%
TV/Radio/Print Media (NET)	**61%**	**56%**
Literature in doctor's offices	27%	30%
Magazines	15%	21%
Medical journal or textbook literature	23%	18%
Friends or family members	**30%**	**31%**

Doctor Visits P12M	Avg.
Users 18-64	**12.5**
Users 65+	**13.7**

Base: 2011 Users
Q23) Which of the following, if any, do you consult on a regular basis for general health information?
Q24) In the past 12 months, how many times have you visited any type of doctor for any health issue?

*Orange = Significant at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- More people are regularly going to the web for health information than in 2010 this has increased significantly in less than 12 months. Showing a potential increasing trend.
- Doctor visits are higher this year compared to 2010

Health Information Sources (%)	2010 Total	2011 Total
Medical Professionals (NET)	**94%**	**93%**
Doctor/Physician	90%	88%
Pharmacist	37%	38%
Websites (NET)	**64%**	**73%**
Health information websites	45%	55%
Search engines	45%	47%
TV/Radio/Print Media (NET)	**63%**	**58%**
Literature in doctor's offices	25%	29%
Magazines	21%	18%
Medical journal or textbook literature	20%	20%
Friends or family members	**33%**	**31%**

Doctor Visits P12M	Avg.
2010 Total	**11.5**
2011 Total	**13.1**

Base: Users
Q23) Which of the following, if any, do you consult on a regular basis for general health information?
Q24) In the past 12 months, how many times have you visited any type of doctor for any health issue?

*Orange = Significant at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- While not a significant amount, more people were observed taking the time to browse the Internet in 2011.

Weekly Activities (%)	2010 Total	2011 Total
At Home Activities (NET)	**98%**	**99%**
Internet/Computer usage	88%	92%
Watching television	86%	88%
Social Activities (NET)	**85%**	**83%**
Socializing with friends	59%	60%
Going out to eat in a restaurant	58%	62%
Outside The Home Activities (NET)	**75%**	**77%**
Grocery shopping	70%	73%
Work at a paying job	21%	20%
Physical Activities (NET)	**69%**	**67%**
Exercise	42%	37%
Spend time working on a hobby	42%	42%

Base: Users
Q25) Which of the following activities and events you find time to accomplish?

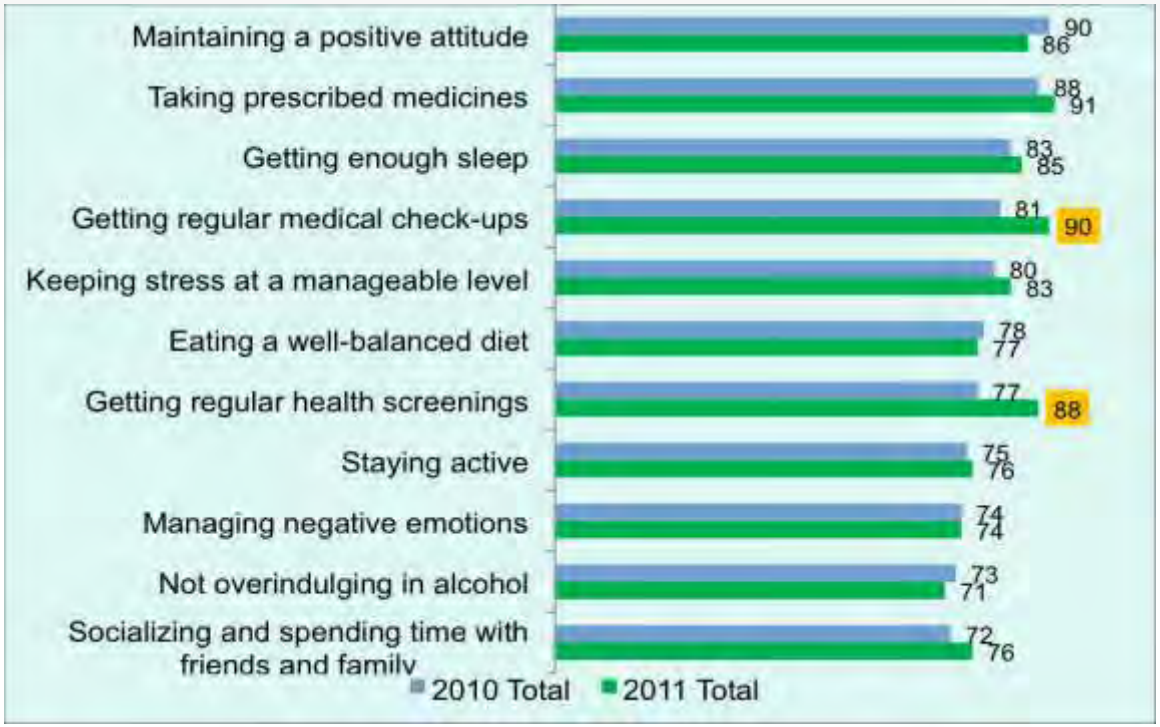
Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- People in 2011 are more conscientious about keeping up-to-date with medical check-ups and screenings.

Importance In Maintaining Health

(% Extremely/Very Important)



Middle Tier Importance (%)	2010 Total	2011 Total
Having interesting challenges in life	61	56
Taking vitamins	61	63
Maintaining good air quality in the home (air/pollen filters)	57	61
Having hobbies	56	57
Exercising regularly	56	52
Avoiding foods that are over-processed	55	55
Prayer and/or meditation	54	56

Low Tier Importance (%)	2010 Total	2011 Total
Having work/a job to do	41	37
Keeping work separate from my personal life	34	33

Base: Users
Q26) For the following, please indicate how important each behavior is to you in maintaining health...

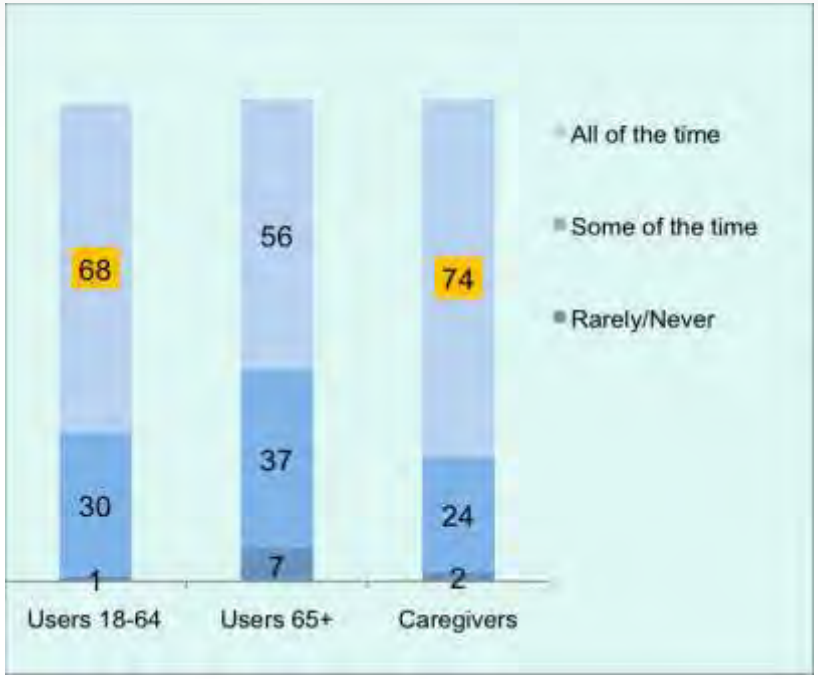
*Orange = Significant at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- Caregivers and users 18-64 show similar Internet usage patterns, with “All of the time” increasing for both groups.
- The majority of those asked are on Facebook and nearly 8 out of 10 age 18-64 are there.
  - Half of those asked click on Facebook advertising banners or join a Fan page.

Internet Research Frequency (%)



Websites Visited (%)	Users 18-64	Users 65+	Care givers
AARP	51	71	70
Facebook	75	56	61
Avg. # Friends	*121.0*	*61.0*	*132.4*
% click on sponsored ads or join a Fan page	56	41	52
Twitter	18	5	22
New Mobility	17	8	14
Misc. blogs that focus on disabilities and mobility issues	8	9	8

Base: 2011 Total Interviews
Q28) When you are researching products and services, how often do you utilize the Internet?
Q29) Which of the following websites have you ever visited?
Q29a1) You mentioned you have visited Facebook, do you ever click on the sponsored ads on the right hand side of the page or join a Fan Page of a company or group?

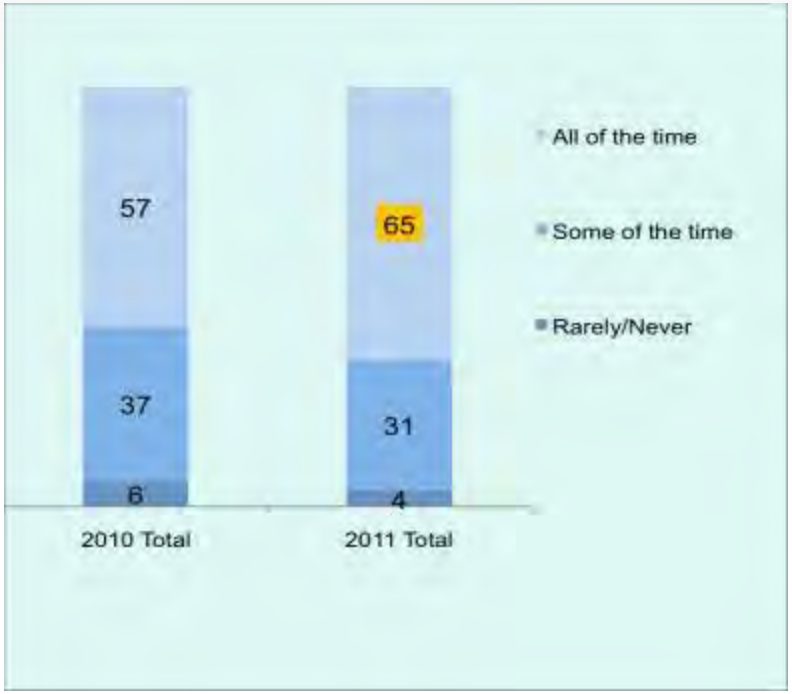
*Orange = Significant at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- Significantly more people are using the Internet as a research tool in 2011.
- Both AARP and Facebook saw significant gains in traffic in only 12 months.

Internet Research Frequency (%)



Websites Visited (%)	2010 Total	2011 Total
AARP	55	63
Facebook	55	65
Avg. # Friends	*94.7*	*104.3*
% click on sponsored ads or join a Fan page		50
Twitter	17	14
New Mobility	11	13
Misc. blogs that focus on disabilities and mobility issues	8	8

Base: Total Interviews
Q28) When you are researching products and services, how often do you utilize the Internet?
Q29) Which of the following websites have you ever visited?
Q29a1) You mentioned you have visited Facebook, do you ever click on the sponsored ads on the right hand side of the page or join a Fan Page of a company or group?

*Orange = Significant at 90% c.i. across groups

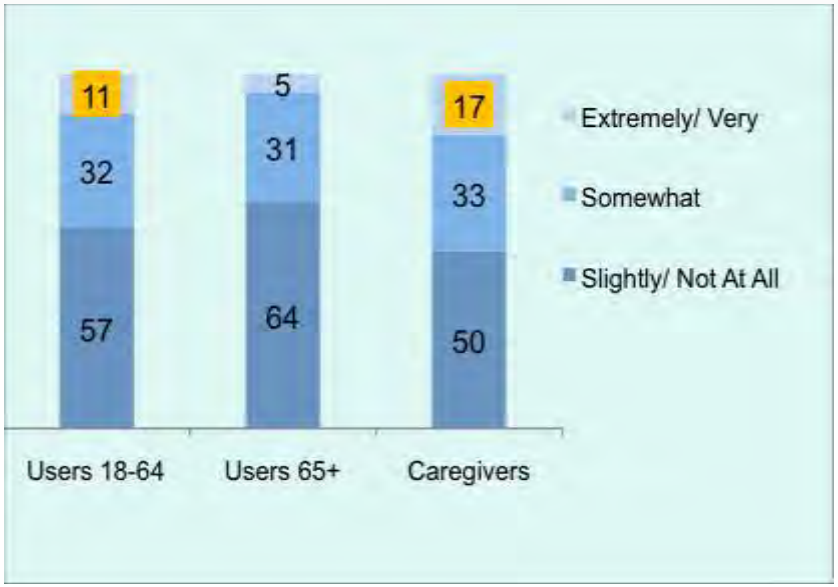
Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- Younger users and caregivers find TV/Radio to be more influential than those 65+.
- Few people subscribe to publications focusing on disabilities.

Publication Awareness (Top % Mentions)	Users 18-64	Users 65+	Care givers	Total % Subscribe
Magazines				
Physical Therapy	9%	11%	16%	1%
New Mobility	14%	9%	10%	3%
Mobility Management	7%	5%	7%	1%
Ability Magazine	8%	3%	6%	0%
Occupational Therapy Now	6%	4%	6%	0%
MDA/Quest	5%	2%	7%	1%
Sports 'n Spokes	5%	3%	3%	0%
Newspapers				
SCI LIFE	4%	3%	4%	0%

TV/Radio Influence (%)



Base: 2011 Total Interviews
Q30) Which of the following newspapers and magazines have you ever heard of…
Q30a) Which of the following do you currently subscribe to or receive?
Q30b) How influential do you find TV or radio advertisements in making your final purchase decisions?

*Orange = Significant at 90% c.i. across groups

Health and Lifestyle

National Mobility Equipment Dealers Association
NMEDA

- Overall, publication awareness dropped in 2010.
- TV and Radio influence remains constant with about 1 in 4 claiming to be at least somewhat influenced by it.

Publication Awareness (Top % Mentions)	2010 Total	2011 Total		2010 Total % Subscribe	2011 Total % Subscribe
Magazines	37%	31%			
New Mobility	10%	11%		2%	3%
Physical Therapy	9%	12%		1%	1%
Perspectives	6%	3%		2%	0%
Mobility Management	5%	6%		1%	1%
Occupational Therapy Now	5%	5%		0%	0%
Newspapers					
SCI LIFE	5%	3%		1%	0%

TV/Radio Influence (%)

Base: Total Interviews
Q30) Which of the following newspapers and magazines have you ever heard of…
Q30a) Which of the following do you currently subscribe to or receive?
Q30b) How influential do you find TV or radio advertisements in making your final purchase decisions?

*Yellow = Significantly LOWER at 90% c.i. across groups

Positive Indicators

National Mobility Equipment Dealers Association
NMEDA

- Increase in consumers purchasing a vehicle modification from a QAP dealer - 31% in 2010 to 40% in 2011.
- Overall satisfaction with purchasing a modified vehicle increased significantly - 71% in 2010 to 85% in 2011.
- When asked to rank importance for most important purchasing criteria, the percent ranking NMEDA/QAP dealer doubled in importance.
- Positive increase in the number of promoters for NMEDA - 32% in 2010 to 45% in 2011.
- NMEDA is perceived as unique proposition that no other organization or company provide the same services.

Positive Indicators

National Mobility Equipment Dealers Association
NMEDA

- As one of the ways consumers research their purchase, visiting a mobility dealership increased 4%, from 71% to 75% in 2011.
- In 2011, fewer asked would buy online without driving.
- All marketing efforts are driving people to NMEDA dealers.
- Online health care research has increased substantially in 12 months - from 64% to 73%
- More people are conscientious about keeping up-to-date with medical check ups and screenings.
- 8 out of every 10 people surveyed were active on social networking sites. Half of those click on Facebook ads and become Fans on pages.

Questions?