



NATIONAL MOBILITY EQUIPMENT DEALERS ASSOCIATION

2014 Awareness Pre-Read Study - January 2014



Background & Methodology

- Research was conducted in six select markets to understand awareness levels, key attitudes, decision criteria, influential and lifestyle factors that are components in the decision process to purchase a vehicle modification. Following this year's National Mobility Awareness Month, NMEDA will be conducting a post-read in the same six markets to gauge the campaigns effectiveness.
- The analysis searched to uncover the following key measures:
 - Awareness
 - Perceived benefits
 - Lifestyle characteristics
 - Demographic profile
 - Influencers by potential customer segment (age/geography)
 - Competitive awareness and competitive set definition
 - Attributes and importance
- N=150 online interviews were conducted between January 8th through 16th 2014. Base sizes were designed to match the 2012 awareness studies to ensure statistical reliability. Respondents were screened to meet the following criteria:
 - Ages: 18+
 - n=75 Ages 18-64
 - n=75 Ages 65+
 - Personally require the use of a mobility assistance device (Users), or be the primary caretaker/decision maker for an individual who does (Caregivers)
 - Reside within 50 miles of the following cities:
 - East: Tampa, Raleigh, Cincinnati
 - West/Central: San Diego, Garland, Indianapolis
 - No competitive employment or households employed in market research, advertising or media



Executive Summary

MOBILITY INDUSTRY

- Significant increases in NMEDA awareness have been measured from the previous consumer studies conducted in February and June of 2012 (pre and post launch of the NMEDA National Mobility Awareness Month). In 2014, 44% of respondents claim to be aware of NMEDA while a notable 76% of those ages 18-64 claim to be aware, a 25% increase from the Post-Read study in June of 2012.
- Almost half of all respondents (45%) are aware of companies in their area who provide Transportation Solutions to people with mobility challenges. Respondents ages 18-64 are significantly more aware (64% vs. 27%) of transportation companies than those ages 65+.
- Overall aided awareness among the tested Mobility Companies has increased significantly (11%) over the past two years. Freedom Mobility is the most widely recognized company with 27% respondent awareness. E.Z. Lock, B&D Independence and ElDorado National all saw significantly higher levels of awareness in 2014 compared to 2012 (24%, 18% and 17% awareness levels respectively).
- 20% of respondents are aware of NMEDA Mobility Dealerships in their area (aided). 11% of respondents specifically mentioned NMEDA Members (13) in their area on an unaided basis.

NATIONAL MOBILITY AWARENESS MONTH:

- An overwhelming 80% of respondents either Like or Love the idea of having and promoting a Mobility Awareness Month, and 77% Like or Love the idea of NMEDA sponsoring National Mobility Awareness Month.
- Consistent with results from 2012, an overwhelming majority of respondents (91%) believe the National Mobility Awareness Month is a worthy cause worth promoting and could become like the other comparable events measured.
- Overall awareness for the month of May being designated as National Mobility Awareness Month along with NMEDA's Free Vans to Local Heroes Contest have increased significantly over the past two years (both showing 19% increases from June of 2012).
 - Over half (51%) of respondents claim to have seen communication for the Free Vans to Local Heroes Give Away, a significant 25% increase compared to 2012. The most frequently viewed contest information was found on Facebook (36%), followed by Local TV (35%), and Local Newspapers (33%).
 - Awareness and visitation of the National Mobility Awareness Month website has also increased significantly since 2012. 40% of respondents have either visited or heard of the website (73% of those ages 18-64).



Executive Summary

ADVERTISING & COMMUNICATION:

- In general, Local TV appears to be the most popular source for finding new information. Over half of all respondents find out about information important to them through Local TV, and Local Newspapers, followed by Facebook at 39%. Significantly more respondents ages 65+ (64%) rely on Local Newspapers versus those ages 18-64 (39%), while significantly more respondents ages 18-64 (57%) rely on Facebook compared to those 65+ (20%).
- Social media sites - Facebook, YouTube and Twitter have been consistently growing in popularity, measuring significantly higher in 2014 versus 2012 (13%, 12% and 8% increases respectively) as sources for important information.
 - Over half of all Facebook users claim to click on Facebook ads and join Facebook group or company fan pages. This figure is significantly higher (79% & 83% respectively) among those ages 18-54.
 - Twitter usage has slowly increased over the past two years; 27% of respondents claim to use Twitter. The majority of users currently follow and are being followed by less than 50 people.
- There have been significant increases in overall visitation among 7 of the top 10 visited websites from the 2012 Pre & Post-Reads. While still performing well, Facebook and AARP both saw decreases in overall visitation from 2012. Facebook visitation significantly decreased among respondents ages 18-64, while AARP did see significant increases in visitation among those ages 65+.
- Overall awareness among the measured newspapers and magazines that focus on disabilities and mobility issues (25), has increased significantly (10%) in the past two years (80% compared to 70% in 2012). Newspaper and magazine subscriptions focusing on disabilities and mobility issues have also seen a significant 17% increase over the past two years (63% compared to 46% in 2012).
 - Both awareness levels and newspaper/magazine subscriptions are significantly higher among respondents ages 18-64 compared to those 65+.
 - AARP, Life in Action and Quest Magazine are the only tested publications (3 out of 25) respondents ages 65+ claim to subscribe to or receive that focus on disabilities and mobility issues.
- Overall, 47% of respondents believe TV and radio advertisements are Very or Extremely Important in their decision making process. A significant 25% increase was measured among those ages 18-64 compared to 2012 perceptions.
- While 47% of respondents believe TV and radio advertisements are Very or Extremely Important when making purchase decisions, even more, 67% believe TV and radio advertisements would be Very or Extremely influential in getting the word out for National Mobility Awareness Month.



2014 Research Highlights

It is important to note that the significant increases in awareness measured in this study are exceptional. Two years had elapsed between studies which likely contributed to this kind of incremental change.

AWARENESS LEVELS:

- NMEDA Awareness: 44% (+14%)
- National Mobility Awareness Month Awareness: 46% (+19%)
- NMEDA Free Vans to Local Heroes Contest: 44% (+19%)
- National Mobility Awareness Month Spokesperson Awareness: 39% (+21%)
- National Mobility Awareness Month Website Awareness/Visitation: 40% (+23%)

ADVERTISING & COMMUNICATION:

- Perception on How Influential TV and Radio Advertisements are in Making Final Purchase Decisions: 47% (+13%)
- Perception on How Influential TV or radio advertisements would be in getting the word out for National Mobility Awareness Month: 67% (+15%)
- Increased Visitation to the Following Websites:
 - Twitter: 27% (+4%)
 - Mobility Awareness Month: 15% (+11%)
 - Quest: 14% (+6%)
 - Mobility Management: 13% (+3%)
 - Ability Magazine: 11% (+4%)
 - PVA Magazine/Sports n Spokes: 8% (+7%)
 - APTA: 8% (+7%)
- Awareness of Newspapers and Magazines that Focus on Disabilities and Mobility Issues: 80% (+10%)
- Newspaper and Magazine Subscriptions that Focus on Disabilities and Mobility Issues: 63% (+17%)

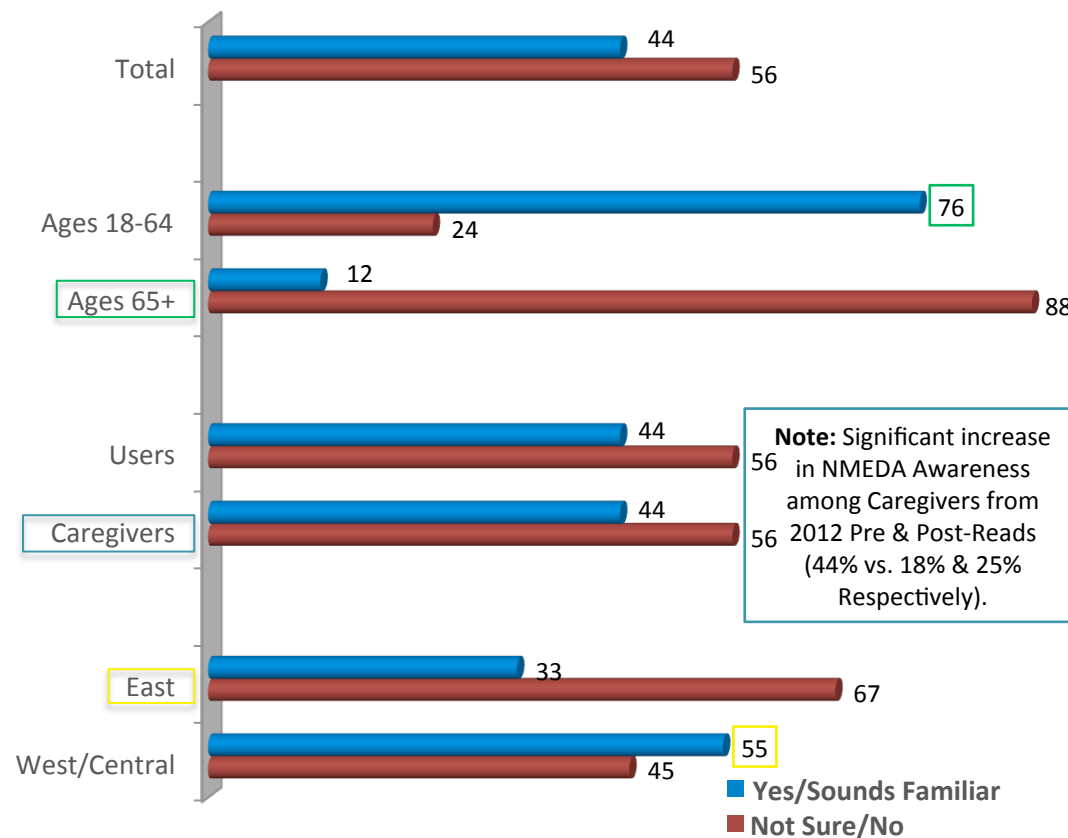
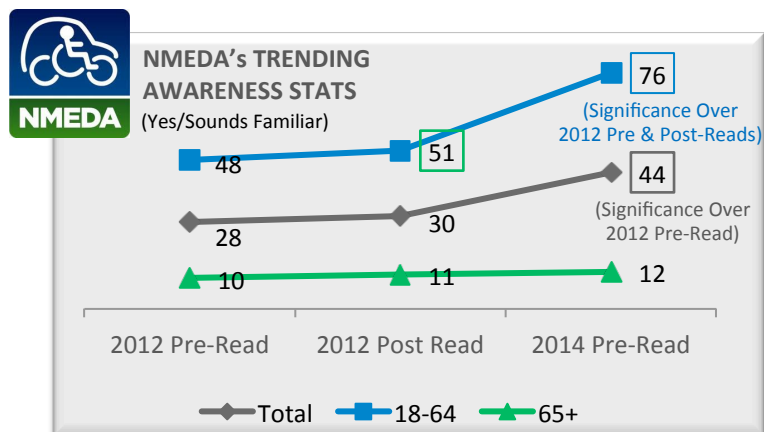


Mobility Industry



NMEDA - Awareness

- There has been a significant increase in awareness for the NMEDA organization since the 2012 Mobility Awareness Month Pre-Read (28%) vs. the 2014 Pre-Read (44%), with a 14% increase from the 2012 Post-Read (30%).
- The most notable increase in awareness was measured among respondents ages 18-64 with over three-quarters (76%) claiming to be aware of the organization.
- Another notable increase was among Caregivers, increasing 19% from the 2012 Post-Read (25%).
- NMEDA awareness is significantly higher in the West/Central cities (San Diego, Garland, Indianapolis) tested at 55% compared to the Eastern cities (Tampa, Raleigh, Cincinnati) at 33%.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q3) Have you ever heard the National Mobility Equipment Dealers Association, which is also referred to as NMEDA?

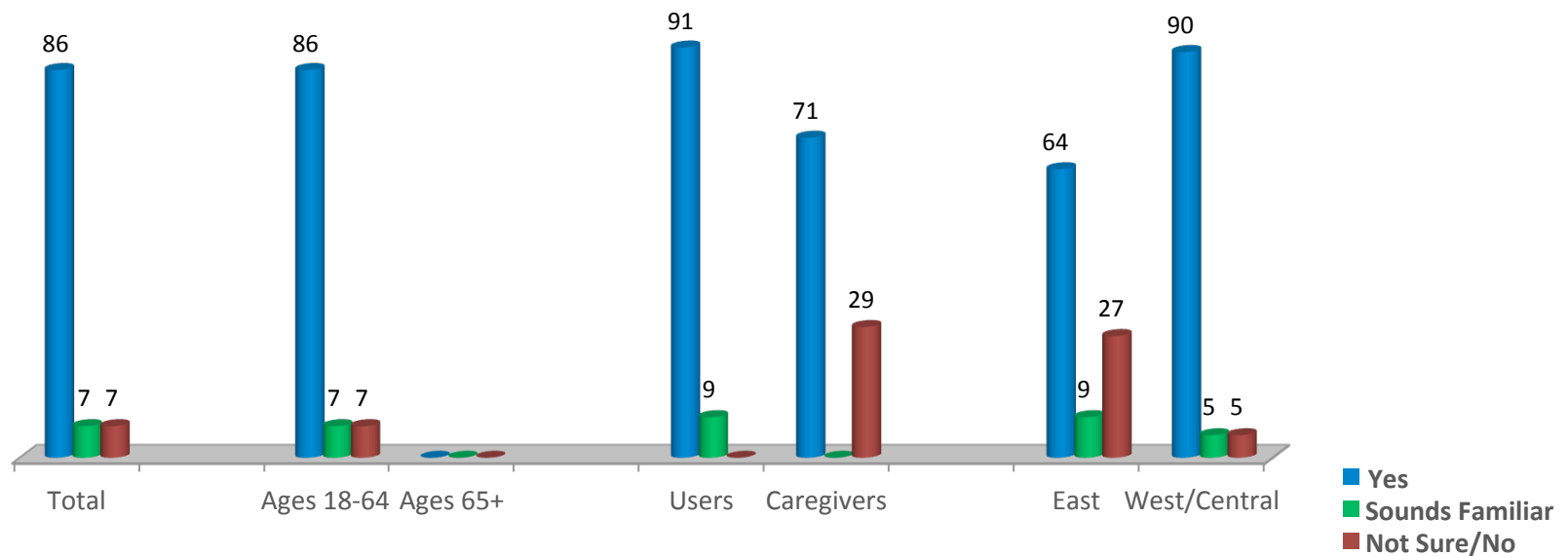
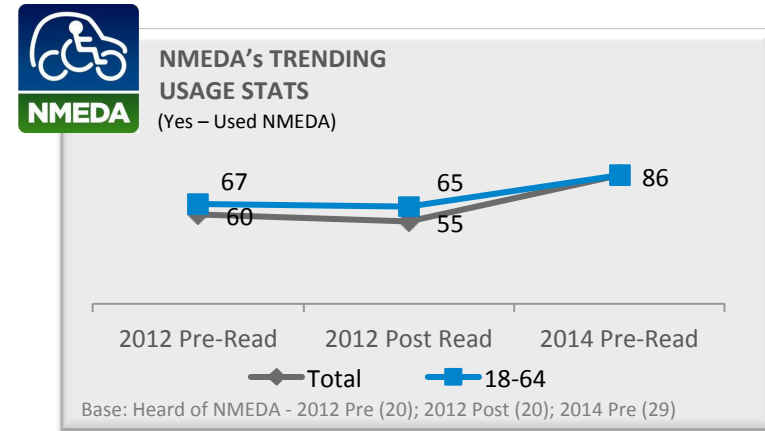
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

NMEDA - Usage

- 86% of respondents aware of NMEDA claim to have used NMEDA services, or the services of a NMEDA member; all of whom were among the ages of 18-64.
- Claimed NMEDA usage was notably higher in Western/Central cities (90% vs. 64%).



Driving Independence | NMEDA.com

Base: Aware of NMEDA (29)**; 18-64 (29); Users (22); Caregivers (7); East (8); West/Central (21)

** Very Small Base Ineligible for Significance Testing

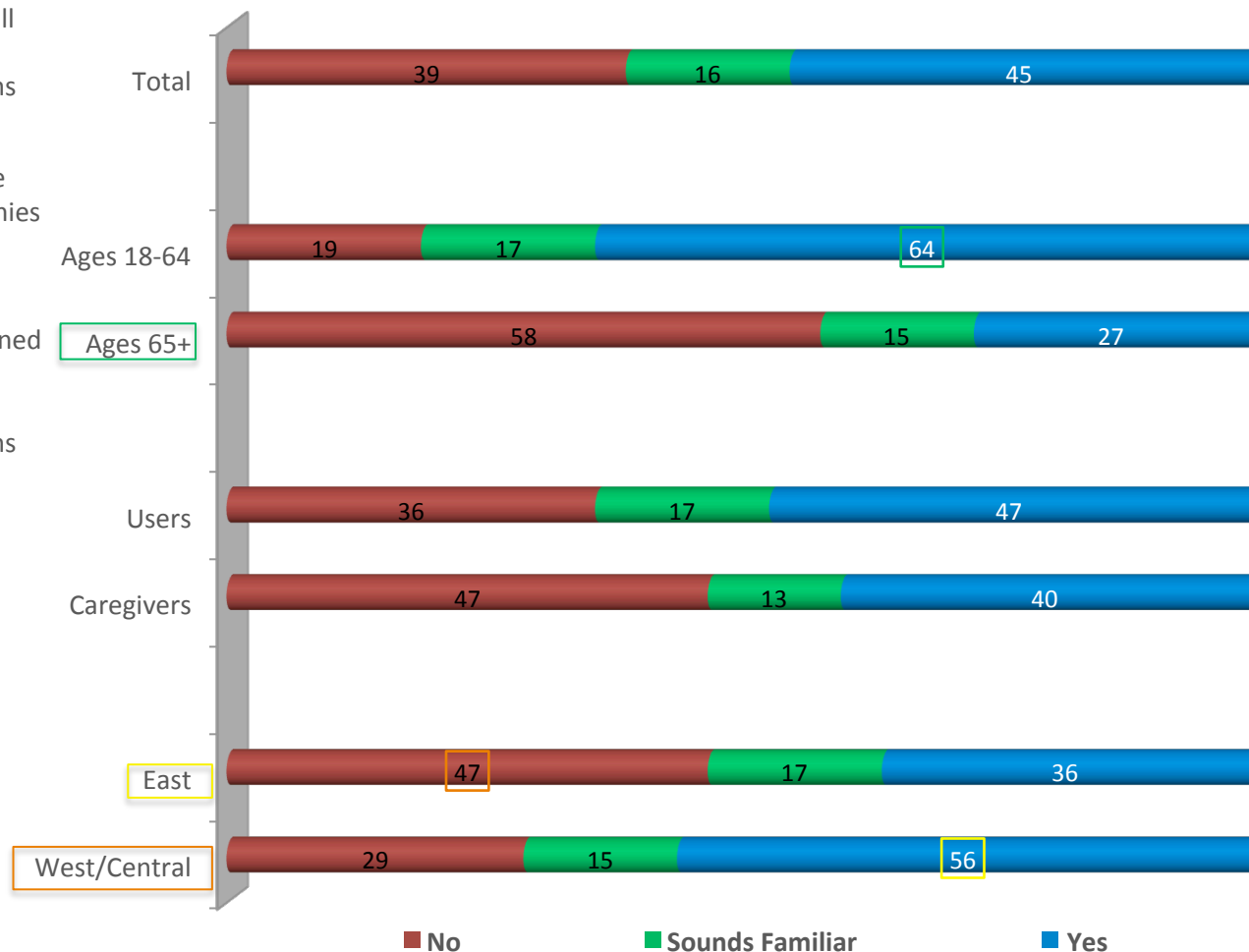
Q4) Have you ever used NMEDA's services, or the services of a NMEDA member dealer?

Transportation Solution - Awareness

- Consistent with 2012 findings, almost half of all respondents (45%) are aware of companies in their area who provide transportation solutions to people with mobility challenges.
- Respondents ages 18-64 are significantly more aware (64% vs. 27%) of transportation companies than those ages 65+, along with respondents from Western/Central cities (56% vs. 36%).
- 13 NMEDA Members were specifically mentioned this year on an unaided basis (11%) when respondents were asked to list companies in their area who provide transportation solutions to people with mobility challenges.

Unaided NMEDA Member Mentions:

- Mobility Express (3)
- BraunAbility (2)
- Toyota (2)
- Ability Center (1)
- Apple Independence Mobility (1)
- Better Life Mobility (1)
- Bruno (1)
- Chrysler (1)
- Mobility Works (1)
- Nissan (1)
- Ride-away (1)
- United Access (1)
- Veterans Admin (VA) (1)



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q5) Do you know of any companies in your area who provide transportation solutions to people with mobility challenges?

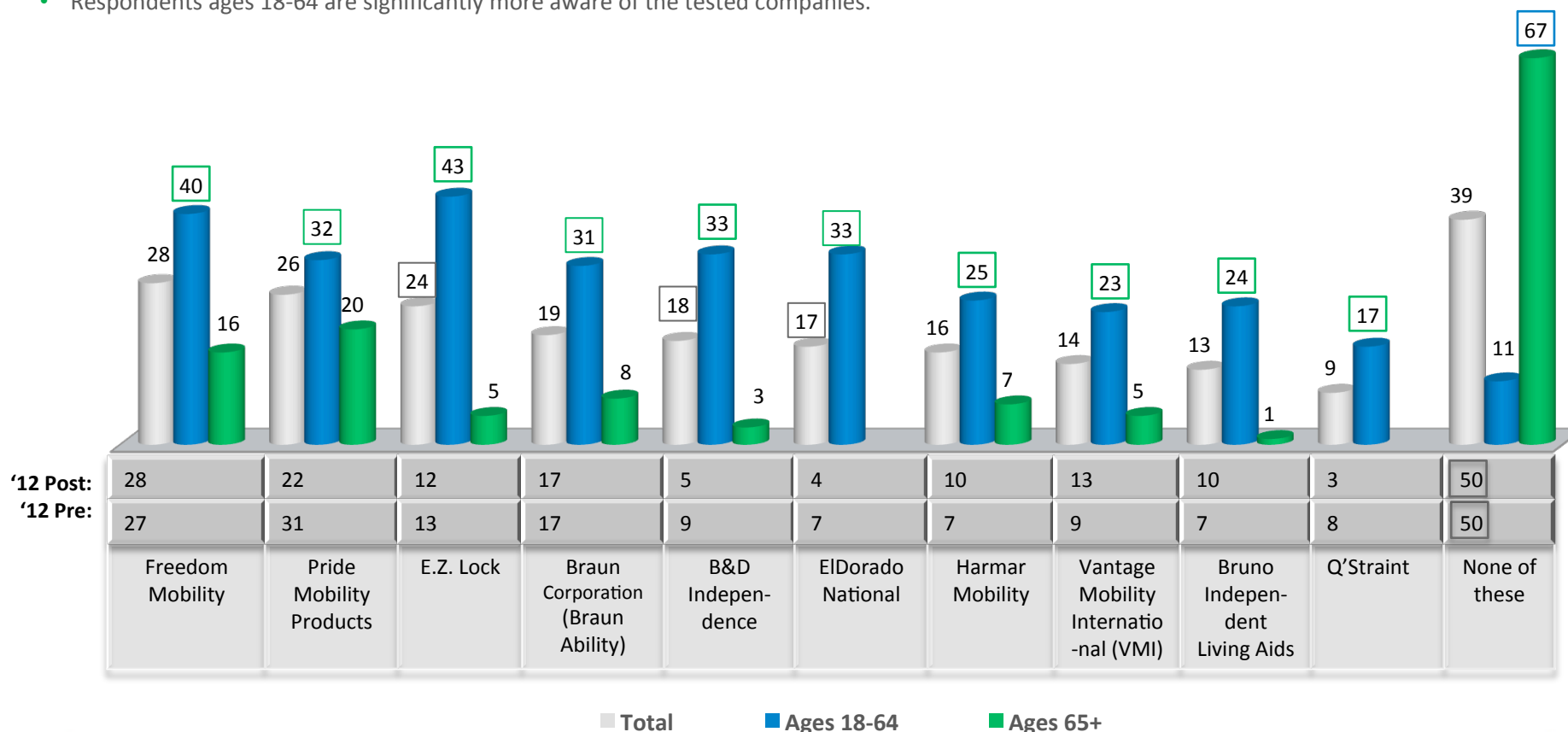
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Company Awareness

- Overall aided awareness among the tested mobility companies has increased significantly (11%) over the past two years.
- Freedom Mobility is the most widely recognized company with 28% aided awareness. E.Z. Lock, B&D Independence and Eldorado National all saw significantly higher levels of awareness in 2014 compared to 2012 (24%, 18% and 17% awareness levels respectively).
- Respondents ages 18-64 are significantly more aware of the tested companies.



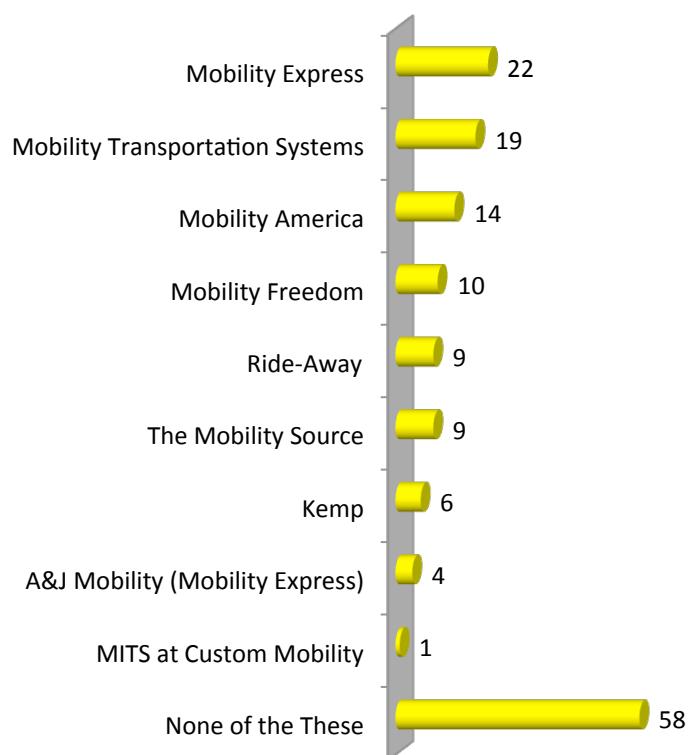
Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q2) Please look at the list below and select each of the companies you are aware of?

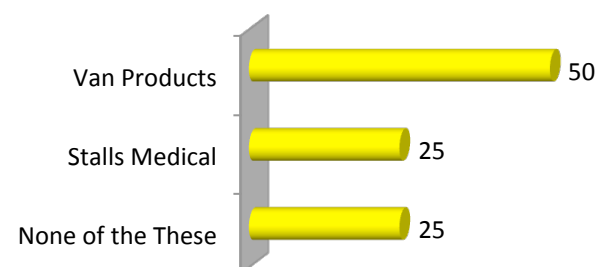
Mobility Dealership Awareness - Eastern Cities

- Overall 45% of respondents in the East are aware of specific Mobility Dealerships in their area.

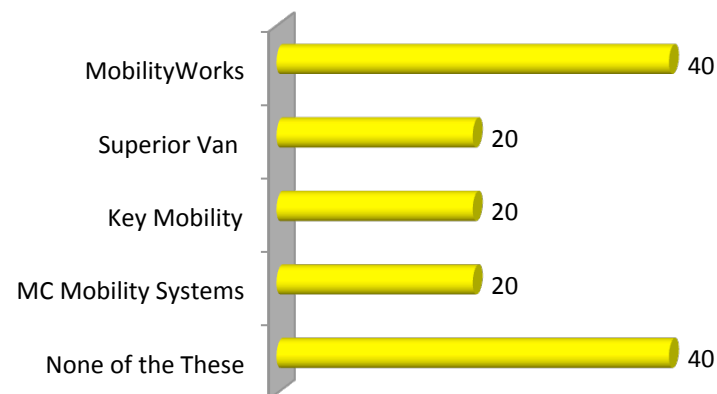
Tampa, FL



Raleigh, NC

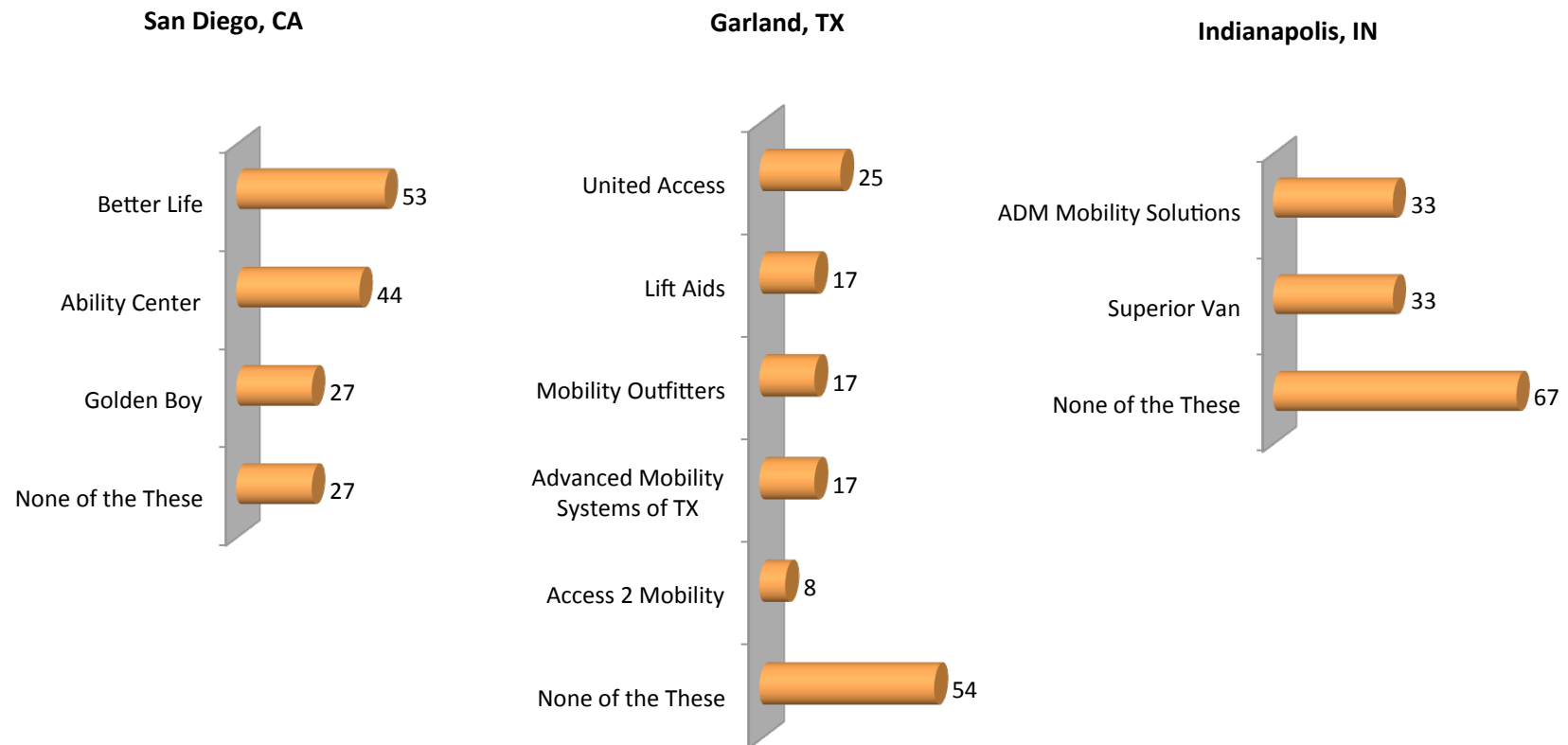


Cincinnati, OH



Mobility Dealership Awareness - Western/Central Cities

- 38% of respondents in Western/Central cities are aware of specific Mobility Dealerships in their area.



National Mobility Awareness Month

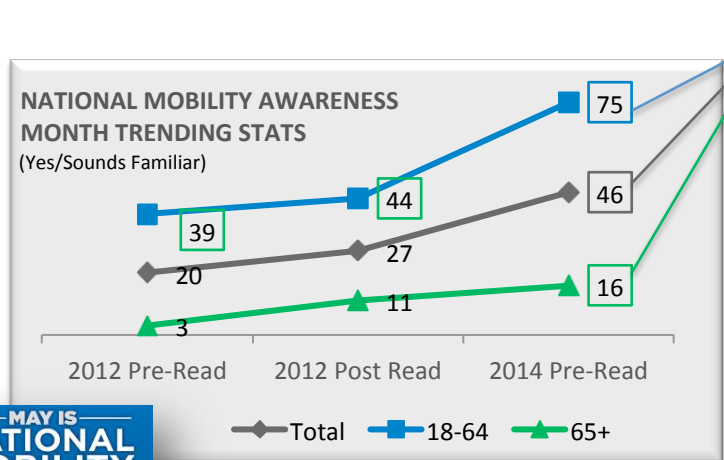


National Mobility Awareness Month - Awareness

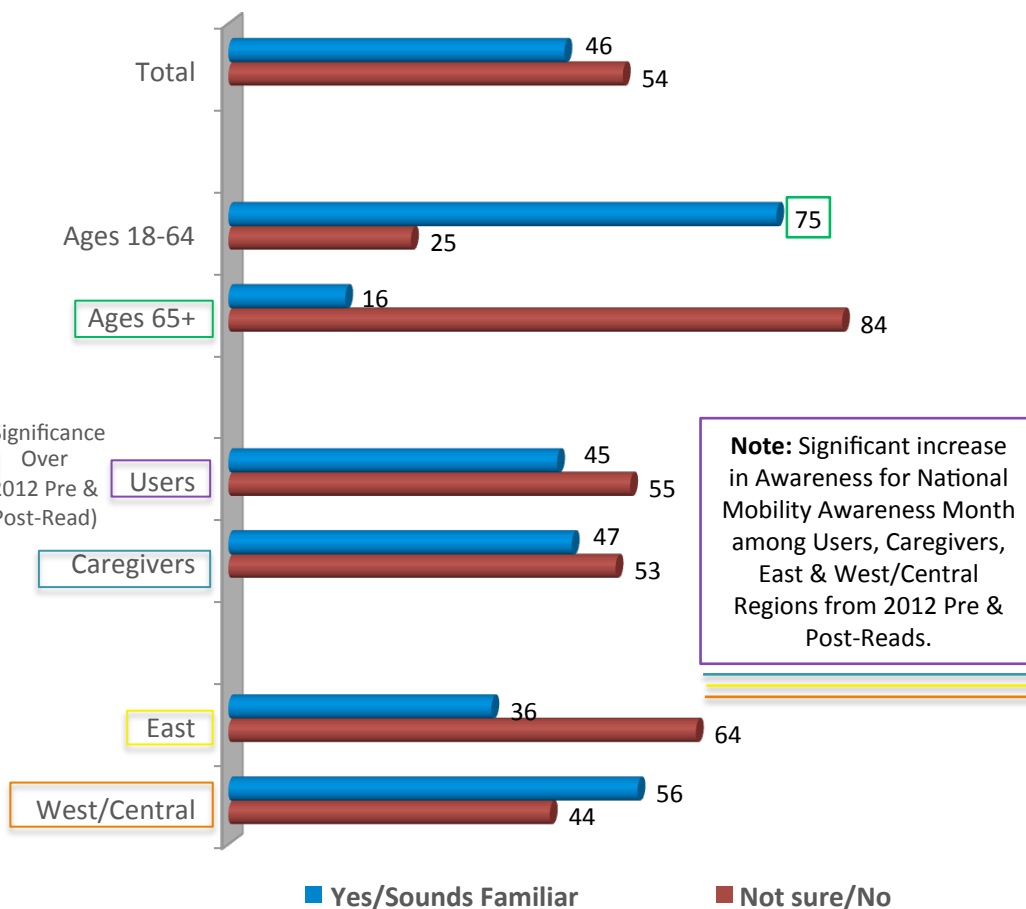
NATIONAL MOBILITY EQUIPMENT
DEALERS ASSOCIATION



- Awareness for the month of May being recognized as National Mobility Month has increased significantly (19%) over the past two years.
- Significant increases in awareness were seen across all measured segments (age, usage & regions).
- Overall, awareness levels among respondents ages 18-64 were the highest, with three-quarters claiming to be aware (75%).



(Significance Over 2012 Pre & Post-Read)



Note: Significant increase in Awareness for National Mobility Awareness Month among Users, Caregivers, East & West/Central Regions from 2012 Pre & Post-Reads.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q6) Are you aware that the month of May is recognized as National Mobility Awareness Month?

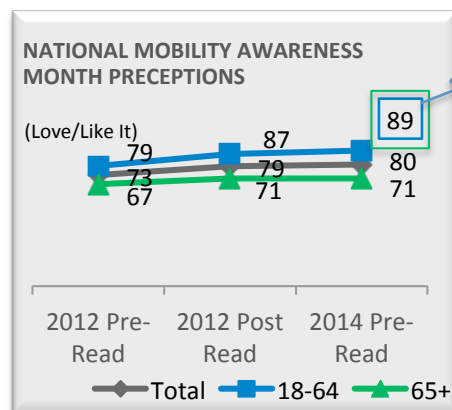
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

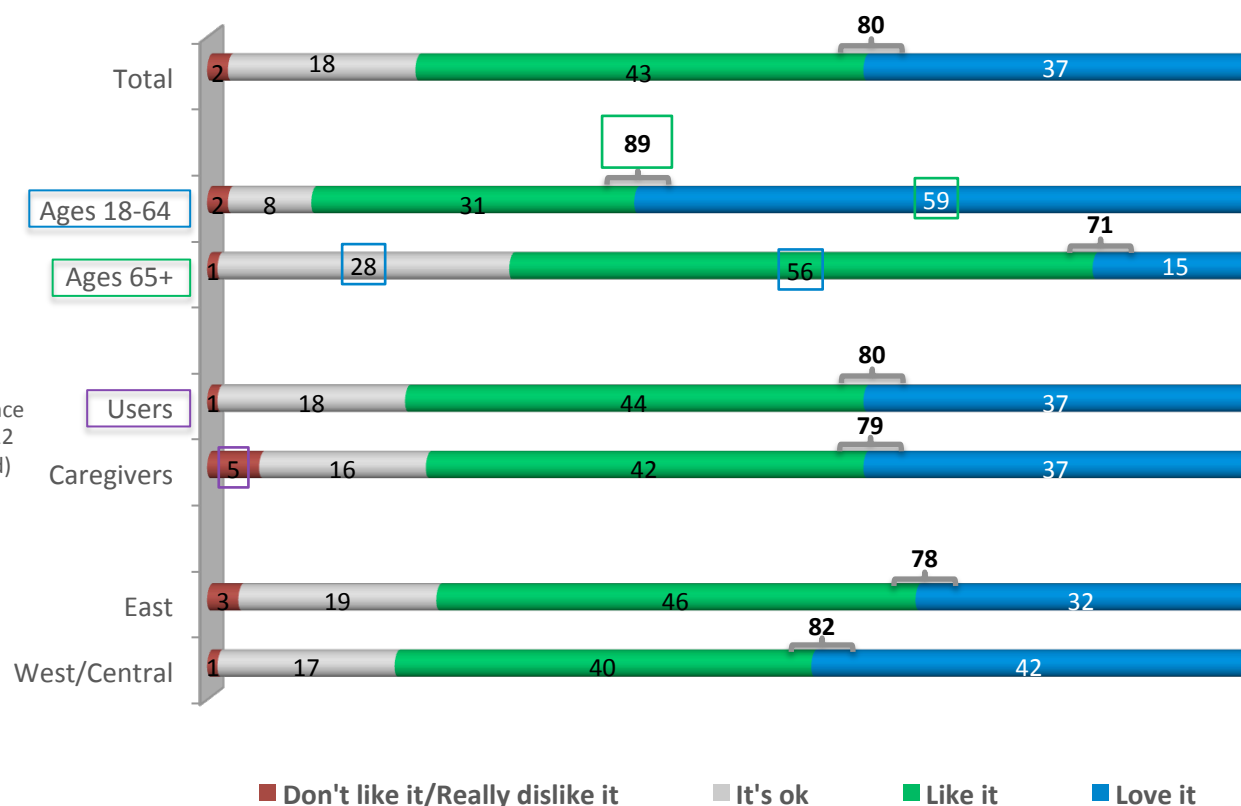
Over Users
Over Caregivers
Over East
Over West/Central

National Mobility Awareness Month - Perceptions

- While awareness for National Mobility Awareness Month continues to grow, overall perceptions about having and promoting the Awareness Month also increased slightly.
- Overall, 80% of respondents Like/Love the idea of having and promoting National Mobility Awareness Month. Perceptions among those ages 18-64 are significantly higher than those 65+ with 59% vs. 15% Loving the idea and a combined 89% vs. 71% Liking or Loving the idea.



(Significance Over 2012 Pre-Read)



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q15) Overall, what are your thoughts about the idea of having and promoting National Mobility Awareness Month?

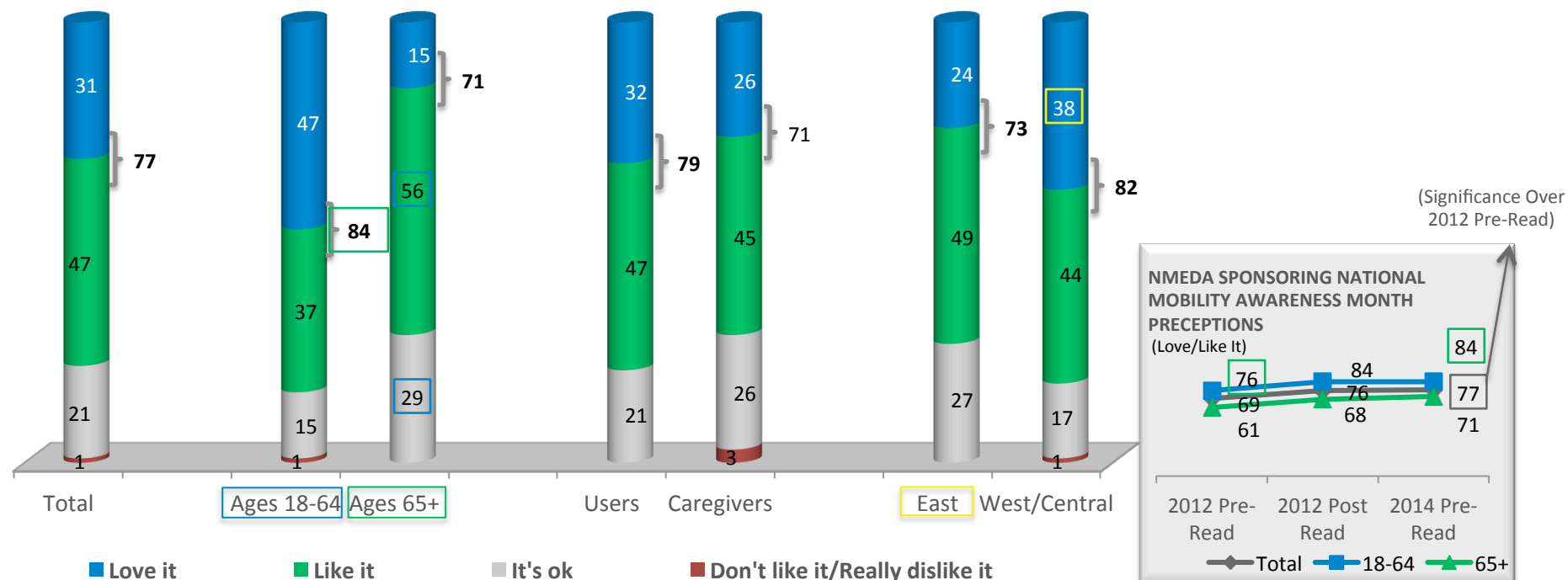
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.
Over Users
Over East
Over Caregivers
Over West/Central

NMEDA Sponsorship - Perceptions



- The majority of respondents (77%) Like or Love the idea of NMEDA sponsoring the National Mobility Awareness Month.
- While the majority are very supportive of the sponsorship, significantly more 18-64 year old respondents (84%) Like or Love the idea of NMEDA sponsoring the National Mobility Awareness Month.



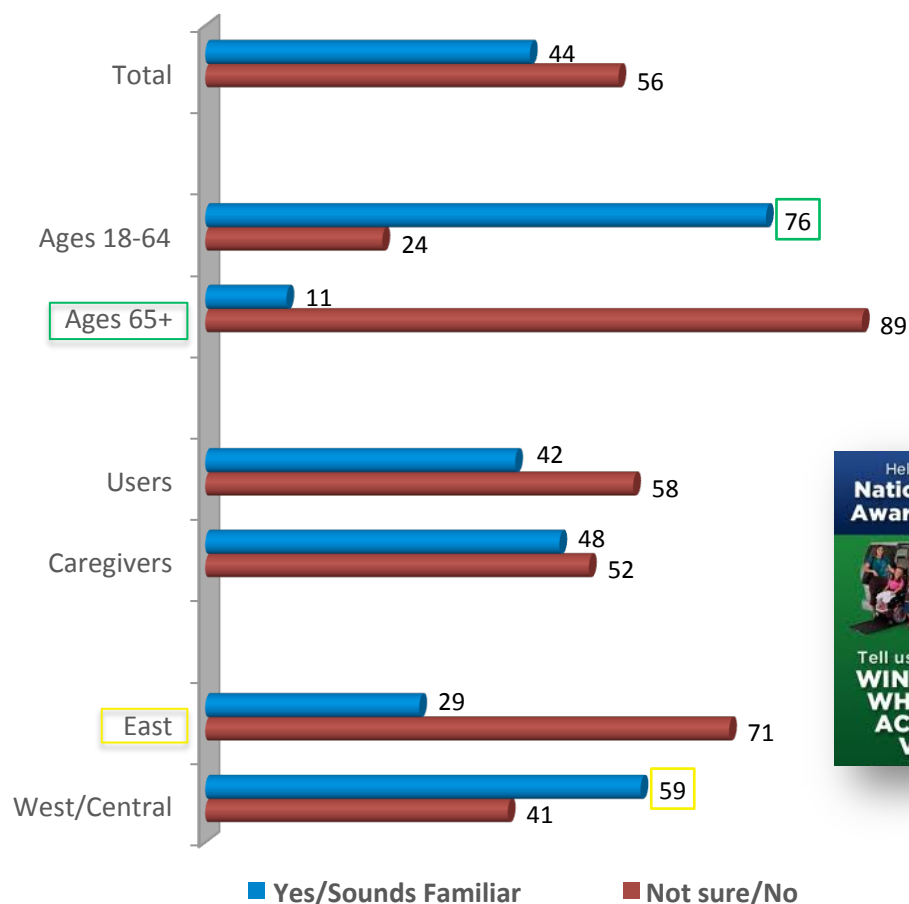
Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
 Q14) What are your thoughts on NMEDA sponsoring National Mobility Awareness Month?

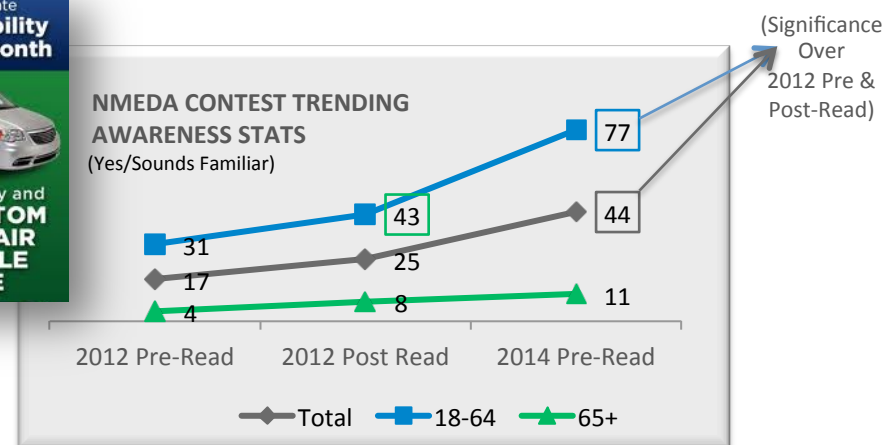
Over Ages 18-64
 Over Ages 65+
 Total

Significantly Higher Results: at 95% C.I.
 Over Users
 Over East
 Over Caregivers
 Over West/Central

Free Vans to Local Heroes Give Away - Awareness



- Awareness of NMEDA's contest giving away Free Vans to Local Heroes during National Mobility Awareness Month has increased significantly over the past 2 years (19% from the 2012 Post-Read).
- Contest awareness is on par with overall awareness of the Month of May being National Mobility Awareness Month.
- Respondents ages 18-64 and those from Western/Central tested cities are significantly more aware of NMEDA's contest.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q7) Have you heard of the NMEDA contest where they are giving away Free Vans to Local Heroes during National Mobility Awareness month?

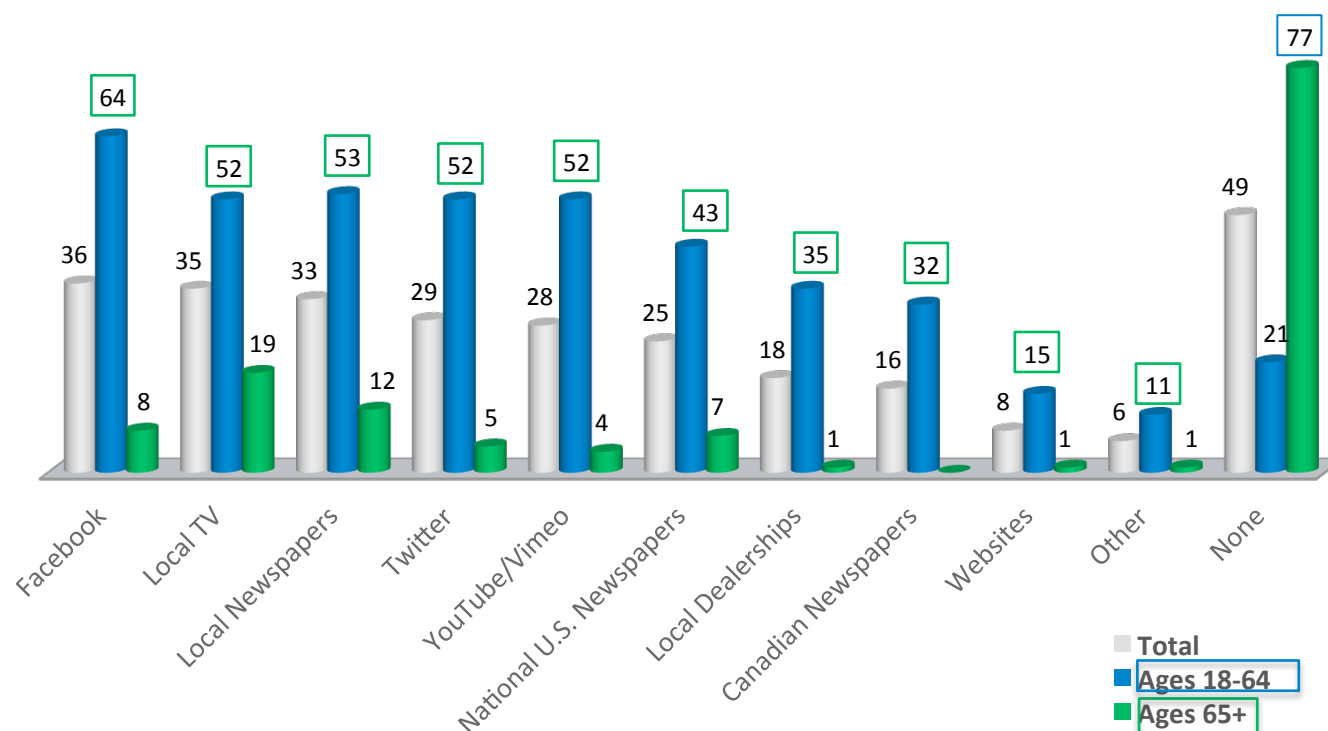
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.
Over Users
Over Caregivers
Over East
Over West/Central

Free Vans to Local Heroes Give Away - Communication

- Over half (51%) of respondents claim to have seen communication for the Free Vans to Local Heroes Give Away, a significant 25% increase over 2012. Those ages 18-64 claim to have seen significantly more communication than respondents ages 65+ (across all mediums).
- Over one-third of respondents have seen communication for the Free Vans to Local Heroes Give Away on Facebook, Local TV or their Local Newspapers.

	2012 Post Read	% Change
Facebook	18	+18
Local TV	-	+35
Local Newspapers	17	+16
Twitter	13	+16
YouTube/Vimeo	5	+23
National U.S. Newspapers	13	+12
Local Dealerships	15	+3
Canadian Newspapers	5	+11
Websites	-	+8
Other	4	+2
None	74	-25



Driving Independence | NMEDA.com

Base: Total (150)

Q12) Have you seen communication for the Free Vans to Local Heroes Give Away on any of the following?

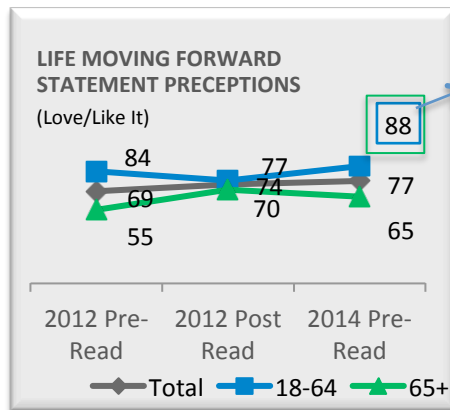
National Mobility Awareness Month

Tagline - Perceptions

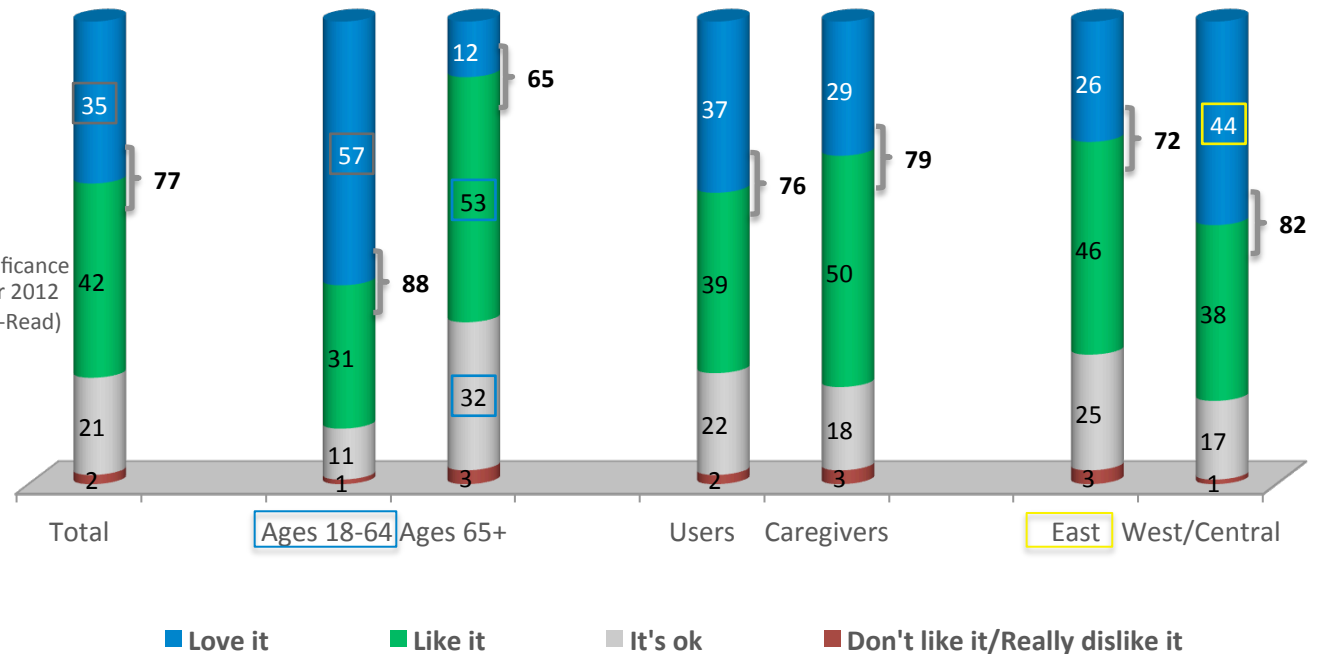


Life Moving Forward

- Over three-quarters of respondents Like or Love the statement 'Life Moving Forward.' Among that 77% of respondents there was a significant increase in those who Love the statement (35% compared to 25% in 2012).
- Significantly more respondents ages 18-64 Love the statement (57%) compared to those 65+ (12%).



(Significance
Over 2012
Post-Read)



Driving Independence | NMEDA.com

Base: Total (150)

Q13) The statement "Life Moving Forward" is for National Mobility Awareness Month. What do you think of this statement?

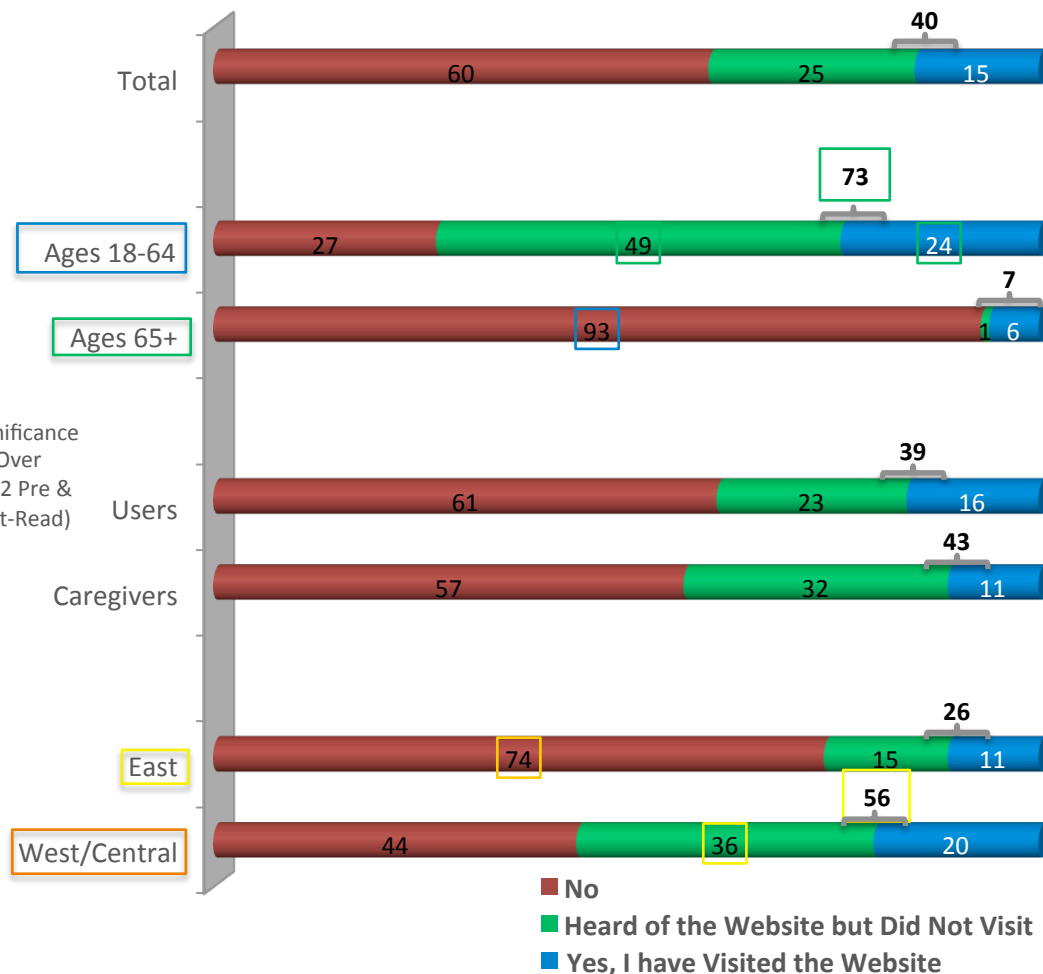
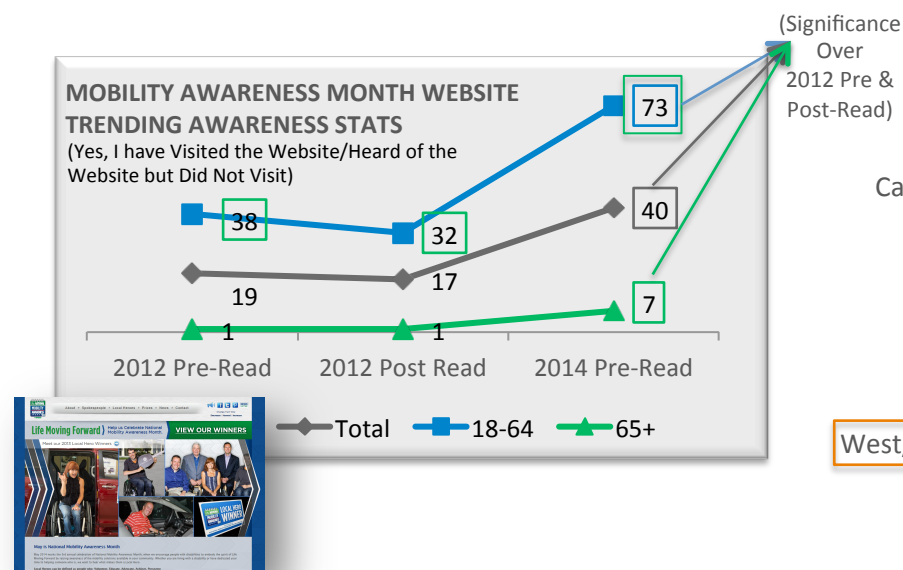
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

National Mobility Awareness Month Website - Awareness

- Awareness and visitation of the National Mobility Awareness Month website has increased significantly since 2012. 40% of respondents have either visited or heard of the website (73% of those ages 18-64).
- Respondents in the Western/Central cities tested were significantly more aware of the site.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q10) Have you heard of or visited the National Mobility Awareness website, www.mobilityawarenessmonth.com?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.
Over Users
Over Caregivers
Over East
Over West/Central

National Mobility Awareness Month Website - Visitation

- On average, those respondents who have visited the National Mobility Awareness Month website over the past two years have visited numerous pages. The majority of respondents (73%) claim to have visited the Events page, followed by the Support page (64%).

Page Visits (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Events	73	72	75	67	100	88	64
Support	64	72	25	67	50	38	79
Local Heroes	45	33	100	50	25	50	43
About	41	44	25	39	50	38	43
News	41	39	50	33	75	25	50
Spread the Word	41	44	25	39	50	13	57
Contact	32	33	25	33	25	25	36



Driving Independence | NMEDA.com

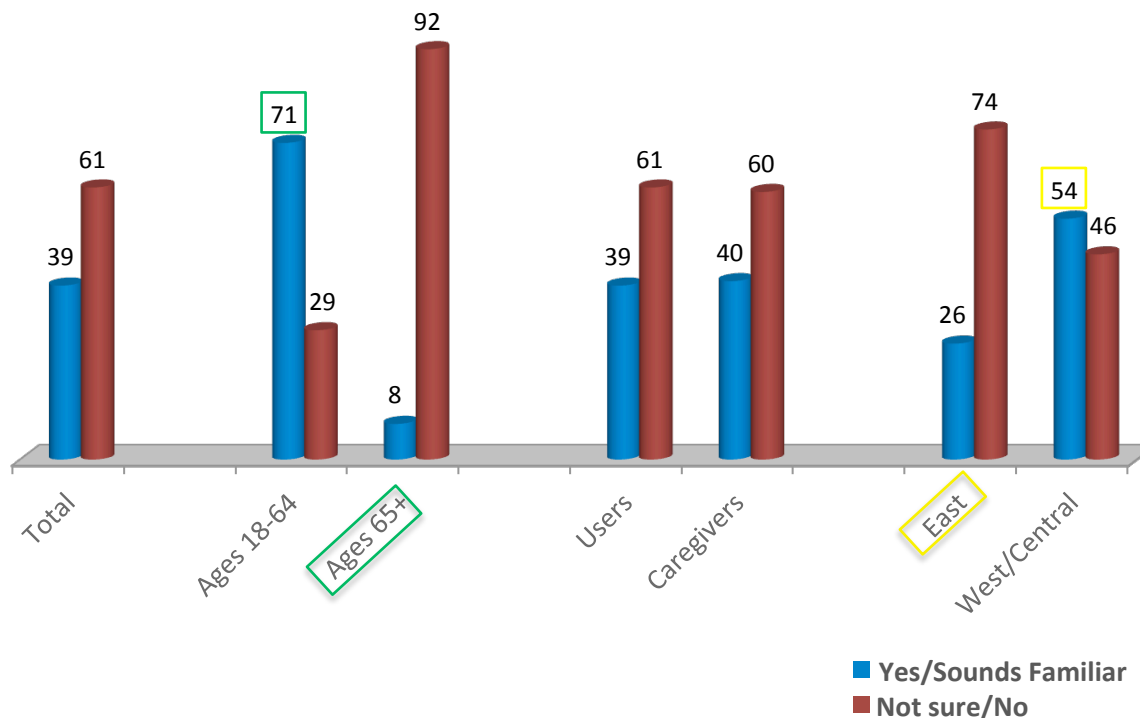
Base Visited MobilityAwarenessMonth.com (22)**; 18-64 (18); Ages 66+ (4); Users (18); Caregivers (4); East (8); West/Central (14)

** Very Small Base Ineligible for Significance Testing

Q11b) What pages did you visit on the National Mobility Awareness website, www.MobilityAwarenessMonth.com?

National Mobility Awareness Month Spokesperson - Awareness

- In 2014 respondents across both age segments (18-64 and 65+) were significantly more aware of NMEDA's National Mobility Awareness Month having a spokesperson, however specific unaided mentions were low with only two mentions of Mike Savicki, a Navy Veteran and other random guesses.
- Spokesperson awareness was also significantly higher in the Western/Central tested cities.



Spokesperson Verbatims

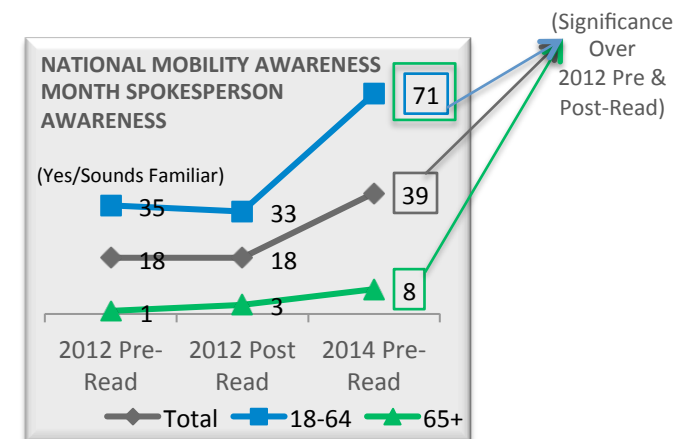
Mike Savicki (2)

Navy Veteran

Obama

Ben Affleck

Bob Barker



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q8) Does the NMEDA National Mobility Awareness Month have a spokesperson?

Q9) Who is the spokesperson for the NMEDA National Mobility Awareness Month?

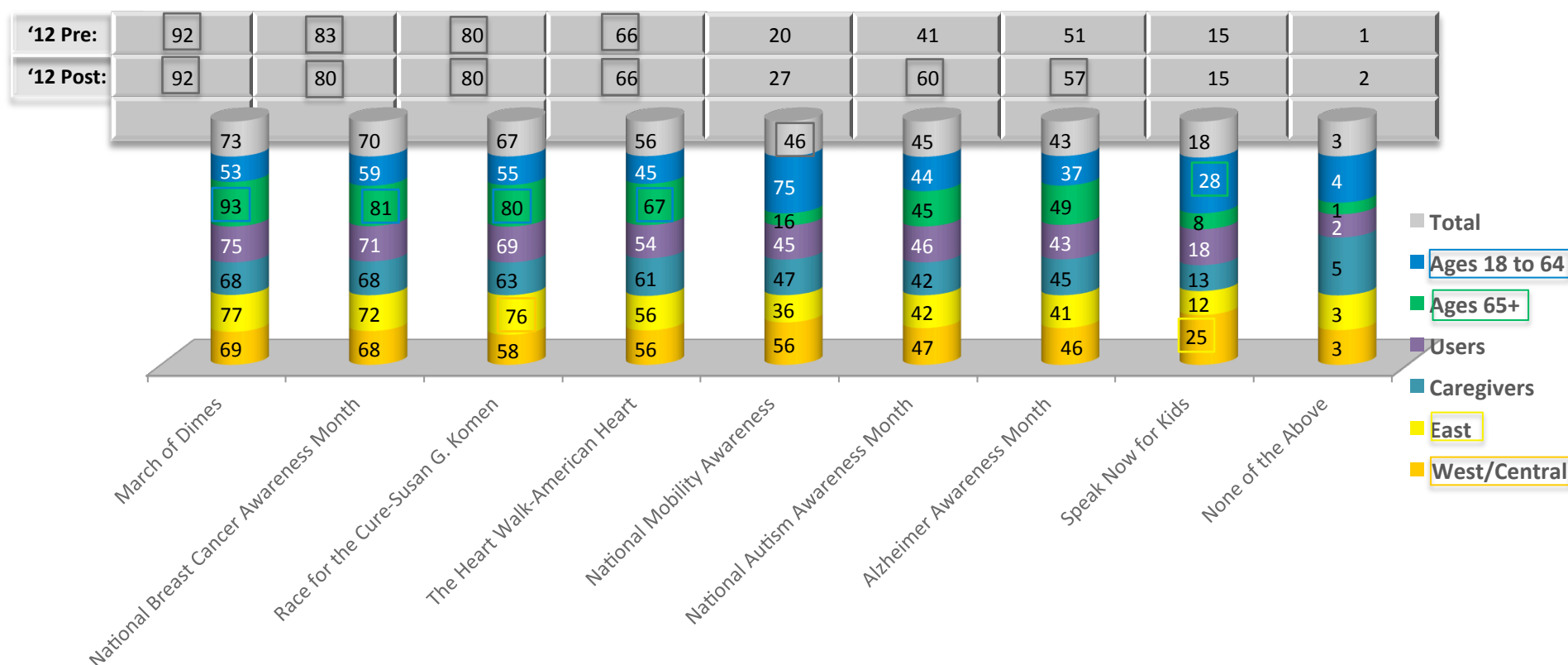
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Comparable Events - Awareness

- Overall awareness for the National Mobility Awareness Month has increased while six of the eight other measured events saw significant decreases in awareness.
- It is interesting to note that awareness levels for the March of Dimes, National Breast Cancer Awareness Month, Race for the Cure and The Heart Walk are significantly higher among respondents ages 65+, however down overall.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q17) Which of the following are you aware of?

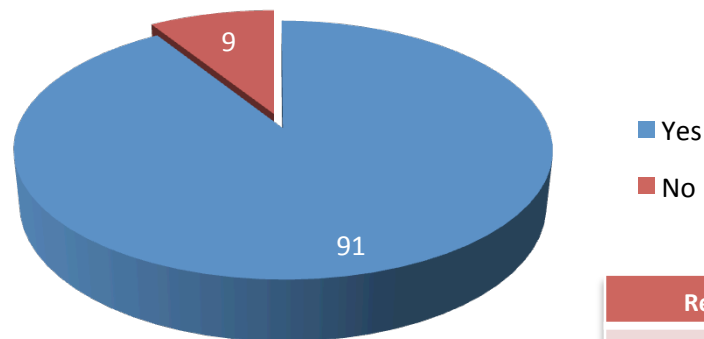
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Perceptions of National Mobility Awareness Month vs. Other Events

- Consistent with results from 2012, an overwhelming majority of respondents (91%) believe the National Mobility Awareness Month could become like the other comparable events measured.
- Overall, respondents believe the National Mobility Awareness Month is a good and worthy cause worth promoting.
- The very small percentage (9%) who don't fully believe in its potential felt it wouldn't have the national support from a large enough audience.



Reasons Why
<i>Because it is for a good cause.</i>
<i>It is equally as important.</i>
<i>Because more and more folks and our veterans need this help for many are alone and stranded and need rides with help to our Doctors etc.</i>
<i>There's a strong chance, if it is publicized more.</i>
<i>Because there are thousands of people with mobility problems.</i>
<i>Because the community of aging people with mobility issues and the added issues with disabled veterans would fuel the need for a local chapter to be formed to help awareness and give aid to those who have mobility problems and no resources to help them.</i>
<i>It's a cause that needs to be supported by many and should be brought to the attention of everybody.</i>
<i>Mobility issues cross all illness boundaries. Personal mobility comes into play quite a bit in an aging population.</i>
<i>Because it is important. Probably need more marketing and public awareness to bring it to the forefront.</i>
<i>It is worthy of recognition.</i>

Reasons Why Not
<i>It's not popular enough.</i>
<i>It is not focused on enough.</i>
<i>No support.</i>



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q18) Could National Mobility Awareness Month become like those events previously listed?

Q18a) Why did you say it could become like those previously listed?

Advertising & Communication



Information Channels

- Local TV is the most popular source of information across both age segments (18-64 & 65+).
- Over half of all respondents find out about information important to them through Local TV and Newspapers, followed by Facebook at 39%. Overall Local Newspapers appear to be slightly less influential than they were two years ago, however significantly more respondents ages 65+ still find out about information important to them through Local Newspapers (64% vs. 39% ages 18-64).
- Social media sites - Facebook, YouTube and Twitter appear to be consistently growing in popularity, measuring significantly higher in 2014 verses 2012 (3%, 12% and 8% increases respectively).

	2012 Post Read	2014 Pre Read	% Change	2012 Post Read	2014 Pre Read	% Change	2012 Post Read	2014 Pre Read	% Change
	Total			Ages 18-64			Ages 65+		
Local TV	-	62	-	-	44	-	-	80	-
Local Newspapers	53	51	-2	53	39	-14	54	64	+10
Facebook	26	39	+13	36	57	+21	17	20	+3
National U.S. Newspapers	26	29	+3	37	40	+3	14	17	+3
YouTube	17	29	+12	29	45	+16	5	12	+7
Twitter	13	21	+8	23	33	+10	4	9	+5
Radio Advertisements	17	19	+2	23	25	+2	11	12	+1
Local Dealerships	19	12	-7	19	19	-	20	5	-15
Websites	34	11	-23	33	8	-25	36	13	-23
Vimeo	5	6	+1	9	11	+2	-	1	+1
Canadian Newspapers	2	6	+4	3	4	+1	-	-	-



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q16) How do you usually find out about information that is important to you?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

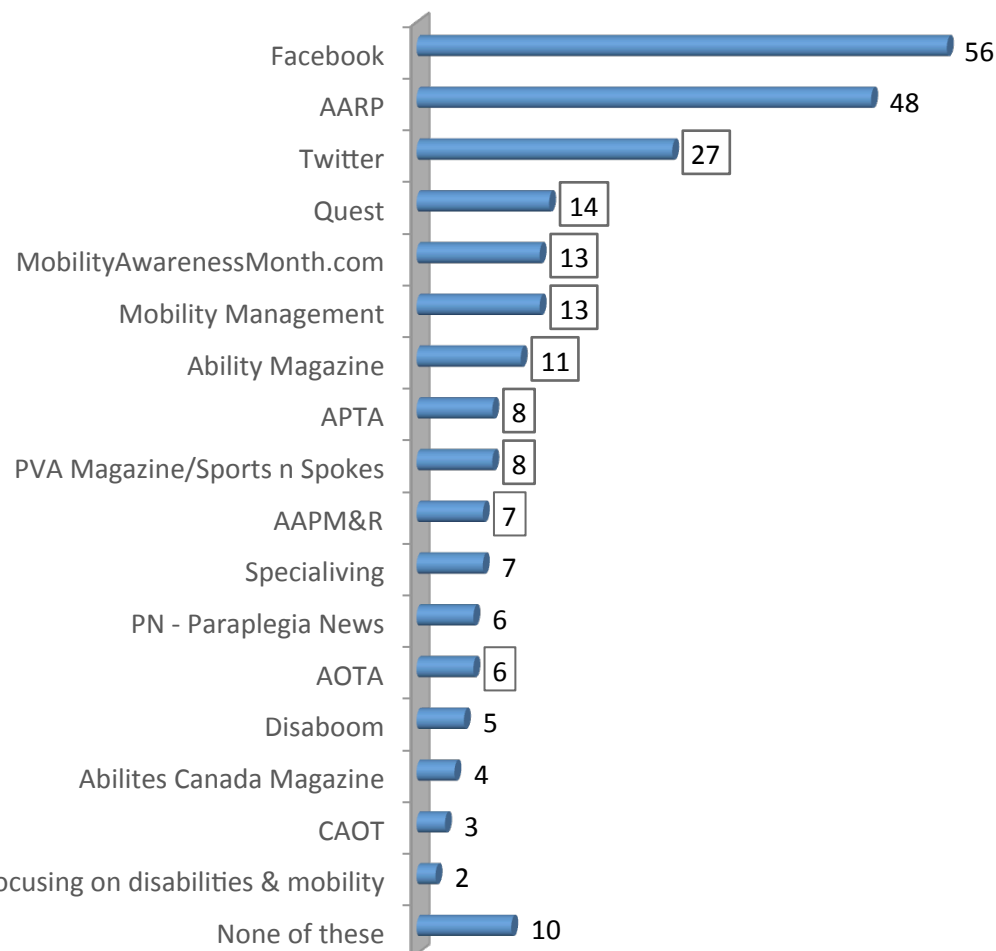
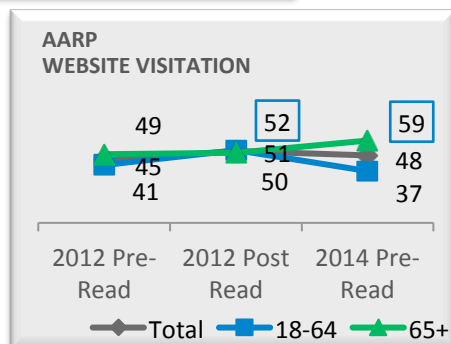
Over Users
Over Caregivers
Over East
Over West/Central

Website Visitation

NATIONAL MOBILITY EQUIPMENT
DEALERS ASSOCIATION



- There have been significant increases in overall visitation among 7 of the top 10 visited websites from the 2012 Pre & Post-Reads.
- While still performing well, Facebook and AARP both saw decreases in overall visitation from 2012. Facebook visitation significantly decreased among respondents ages 18-64, while AARP did see significant increases in visitation among those ages 65+.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q19) Which of the following websites have you visited?

Over Ages 18-64
Over Ages 65+
Total

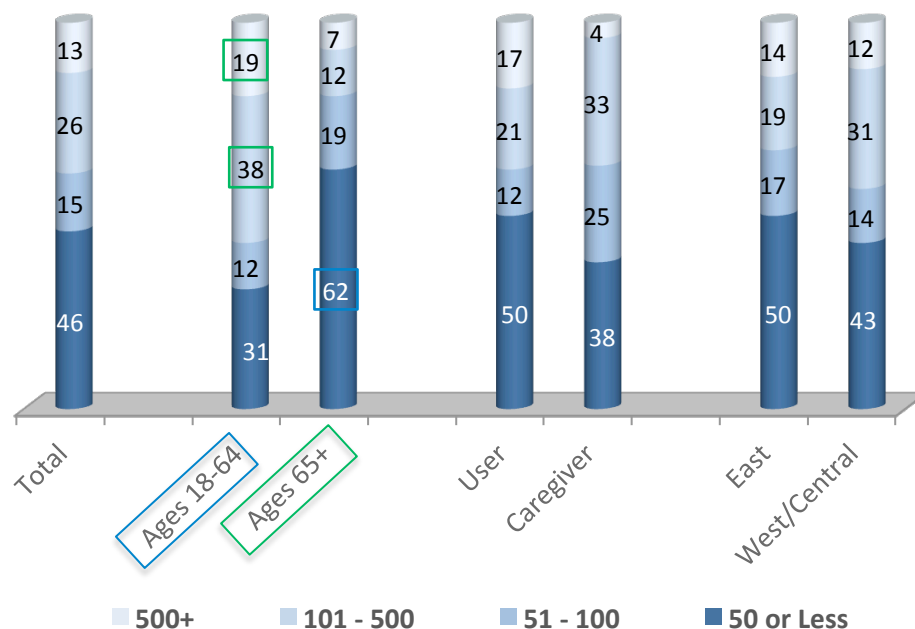
Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

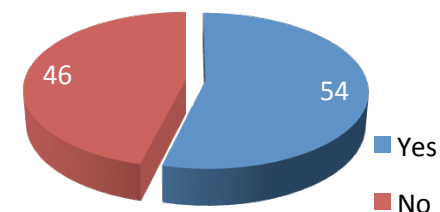
Facebook Visitation



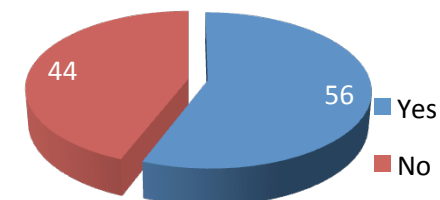
- Among the 56% of respondents who use Facebook, the majority 54% have 51 or more Facebook friends; while over half (62%) of those ages 65+ have less than 50 Facebook friends.
- Over half of all Facebook users claim to click on Facebook ads and join Facebook group or company fan pages. This figure is significantly higher (79% & 83% respectively) among those ages 18-64.



Click on Facebook Ads



Join Facebook Fan Pages



Driving Independence | NMEDA.com

Base: Those who visit Facebook (84); 18-64 (42); Ages 66+ (42); Users (60); Caregivers (24); East (42); West/Central (42)

Q20) You mentioned you have visited Facebook. How many friends do you have on Facebook?

Q21a) When you visit Facebook, do you ever click on the sponsored ads on the right hand side of the page?

Q21b) Do you join company or group Fan Pages on Facebook?

Over Ages 18-64
Over Ages 65+
Total

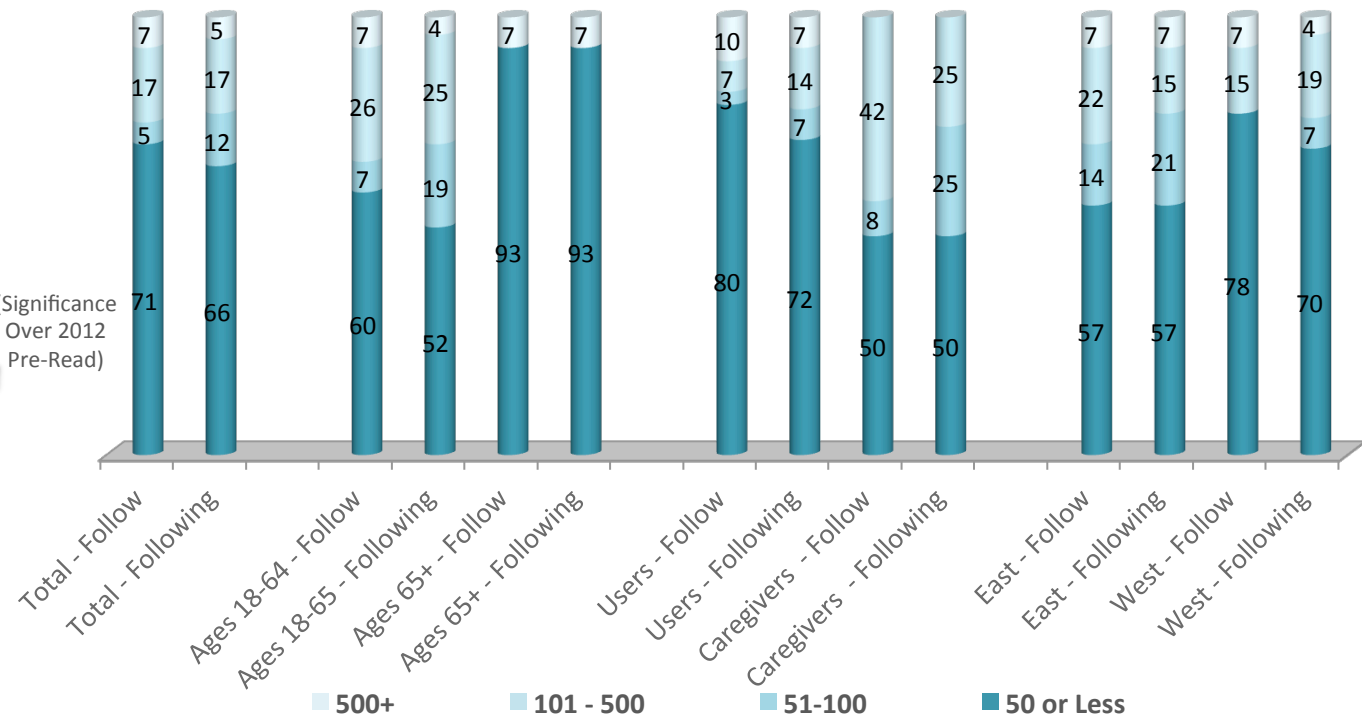
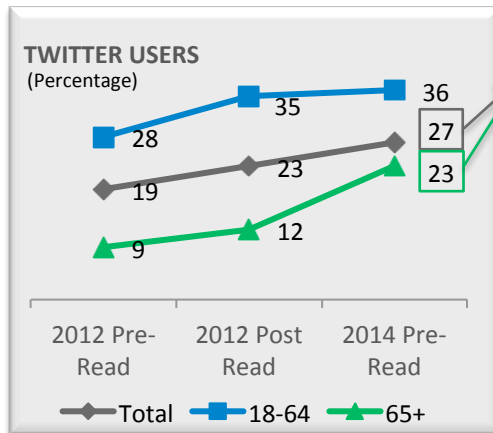
Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Twitter Visitation



- Twitter usage has slowly increased over the past two years; 27% of respondents claim to use Twitter.
- The majority of users currently follow and are being followed by less than 50 people.



Driving Independence | NMEDA.com

Base: Those who use Twitter (41); 18-64 (27); Ages 66+ (14); Users (29); Caregivers (12); East (14); West/Central (27)
Q22a) You mentioned you have visited Twitter. How many people do you follow on Twitter?
Q22b) How many people follow you on Twitter?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.
Over Users
Over Caregivers
Over East
Over West/Central

Newspapers and Magazines

NATIONAL MOBILITY EQUIPMENT
DEALERS ASSOCIATION



- Newspaper/magazine awareness levels and subscriptions are significantly higher among respondents ages 18-64 compared to those 65+.
- AARP, Life in Action and Quest Magazine are the only tested publications respondents ages 65+ claim to subscribe to or receive that focus on disabilities and mobility issues.

	Total		18-64		65+		Users		Caregivers		East		West/Central	
A = Aware of S = Subscriber	A	S	A	S	A	S	A	S	A	S	A	S	A	S
AARP	53	39	40	33	67	45	55	38	47	42	55	42	51	36
Physical Therapy	13	2	19	4	7	-	13	1	13	5	14	4	11	1
Mobility Management	14	5	24	11	4	-	14	5	13	5	4	-	25	11
Occupational Therapy Now	7	3	12	5	1	-	6	4	8	-	5	1	8	4
Ability Magazine	10	3	16	5	4	-	9	2	13	5	6	1	14	4
New Mobility	10	6	19	12	1	-	8	4	16	13	-	-	21	13
Quest Magazine	10	6	13	11	7	1	11	6	8	5	5	3	15	10
Resource Magazine	14	5	25	9	3	-	12	5	21	3	8	1	21	8
Today in PT	9	3	16	5	3	-	10	4	8	-	8	3	11	3
Advance for PT & Rehab Medicine	8	4	13	8	3	-	10	5	3	-	4	-	13	8
Life in Action	9	5	15	8	3	3	9	6	8	3	9	6	8	4
PT in Motion	3	1	3	1	3	-	3	1	3	-	3	-	3	1
Outspoken	8	3	15	7	1	-	8	4	8	3	5	3	11	4
Today in OT	8	4	12	8	4	-	10	4	3	3	5	1	11	7



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q23) Which of the following newspapers and magazines have you heard of that focuses on disabilities and mobility issues?

Q24) Which of the following do you currently subscribe to or receive?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Newspapers and Magazines (Continued...)

- Overall awareness among the measured newspapers and magazines that focus on disabilities and mobility issues (25), has increased significantly by 10% in the past two years (80% compared to 70% in 2012).
- Newspaper and magazine subscriptions focusing on disabilities and mobility issues have also seen a significant 17% increase over the past two years (63% compared to 46% in 2012).

	Total		18-64		65+		Users		Caregivers		East		West/Central	
A = Aware (%) S = Subscribers (%)	A	S	A	S	A	S	A	S	A	S	A	S	A	S
Sports 'n Spokes	5	4	11	8	-	-	4	4	8	5	4	3	7	6
Spinal Columns	5	3	11	5	-	-	4	3	8	3	4	1	7	4
Advance for OT Practitioners	3	1	5	3	-	-	2	1	5	3	3	1	3	1
Play to Podium	6	3	12	7	-	-	7	4	3	-	4	-	8	7
EP Exceptional Parent	5	4	9	8	-	-	6	5	-	-	3	3	7	6
Canadian Journal of Occupational Therapy	4	3	8	7	-	-	4	4	3	3	5	4	3	3
PN (Paraplegia News Magazine)	6	1	11	3	1	-	6	2	5	-	6	3	6	-
Abilities Canada	3	3	5	5	-	-	4	4	-	-	1	1	4	4
SCI LIFE	7	3	12	7	3	-	8	4	5	3	4	1	11	6
The Physiatrist	2	1	4	3	-	-	3	2	-	-	-	-	4	3
News Brake	3	1	4	1	1	-	2	1	5	-	3	-	3	1
Some other magazine/newspaper	1	-	-	-	1	-	1	-	-	-	1	-	-	-
None of these	20	37	11	23	29	52	18	38	26	37	28	41	11	33



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q23) Which of the following newspapers and magazines have you heard of that focuses on disabilities and mobility issues?

Q24) Which of the following do you currently subscribe to or receive?

Over Ages 18-64
Over Ages 65+
Total

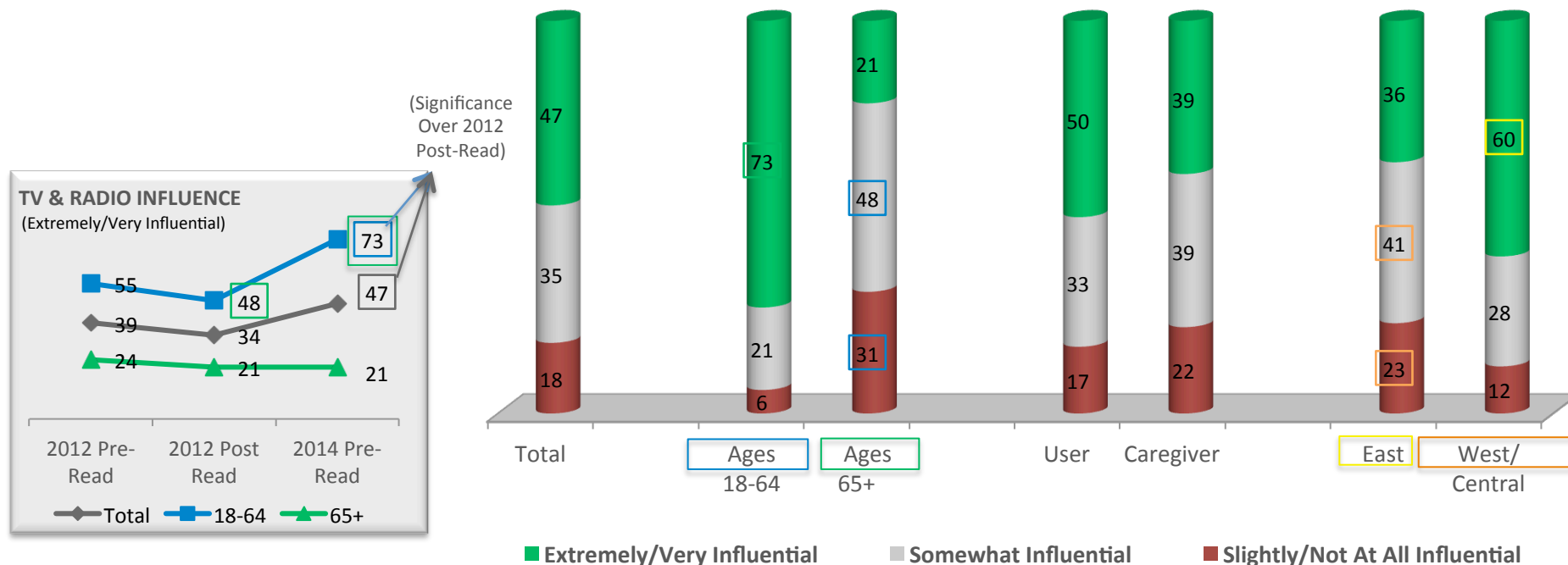
Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

TV & Radio Advertisements - Purchase Influence

MAKING YOUR FINAL PURCHASE DECISION

- Perceptions on how influential TV and radio advertisements are in making final purchase decisions have significantly increased by 13% (Very/Extremely Influential) over the past two years. A significant 25% increase was measured among those ages 18-54.
- Overall, 47% of respondents believe TV and radio advertisements are Very or Extremely Important in their decision making process.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q25) How influential do you believe TV or radio advertisements are in making your final purchase decisions?

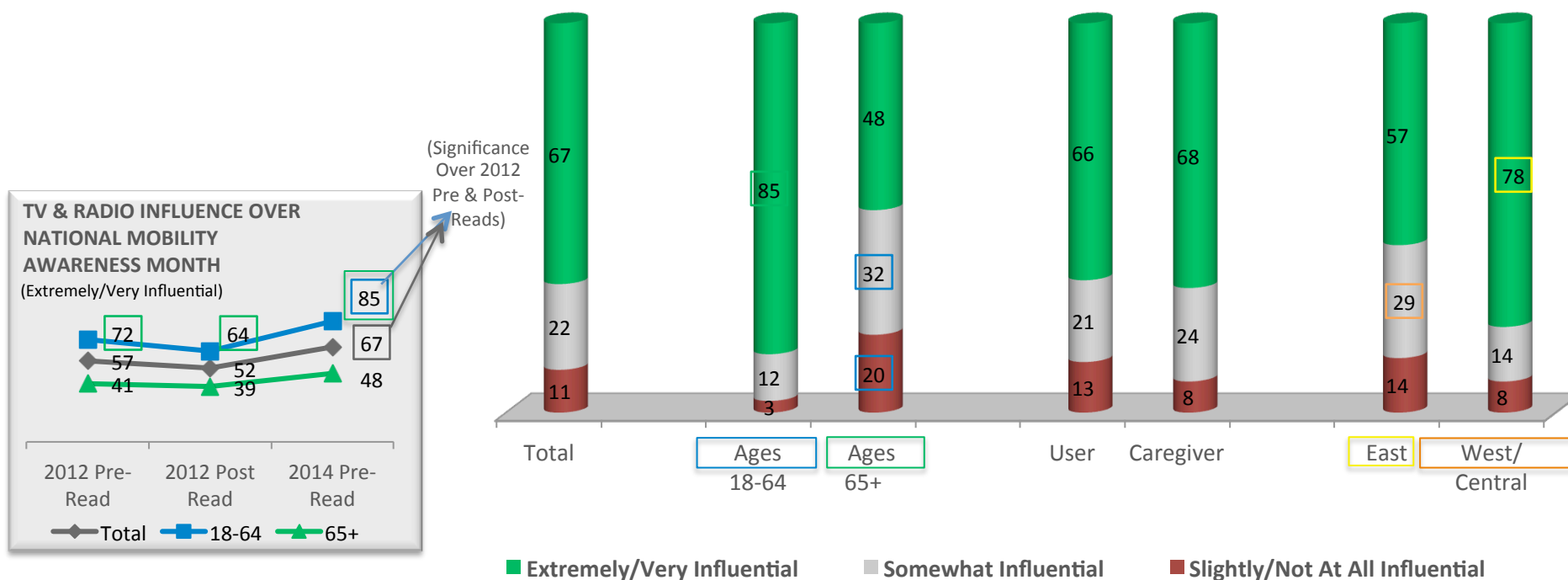
Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.
Over Users
Over Caregivers
Over East
Over West/Central

TV & Radio Advertisements - Awareness Influence

GETTING THE WORD OUT FOR NATIONAL MOBILITY AWARENESS MONTH

- While 47% of respondents believe TV and radio advertisements are Very or Extremely Important when making purchase decisions, even more, 67% believe TV and radio advertisements would be Very or Extremely influential in getting the word out for National Mobility Awareness Month.
- Overall, perceptions have significantly increased over the past two years (15%), skewed by 85% of respondents ages 18-64 believing TV and radio advertisements would be Very or Extremely influential in getting the word out for National Mobility Awareness Month.



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q26) How influential do you believe TV or radio advertisements are in getting the word out for National Mobility Awareness Month?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users Over East
Over Caregivers Over West/Central

Respondent Profile

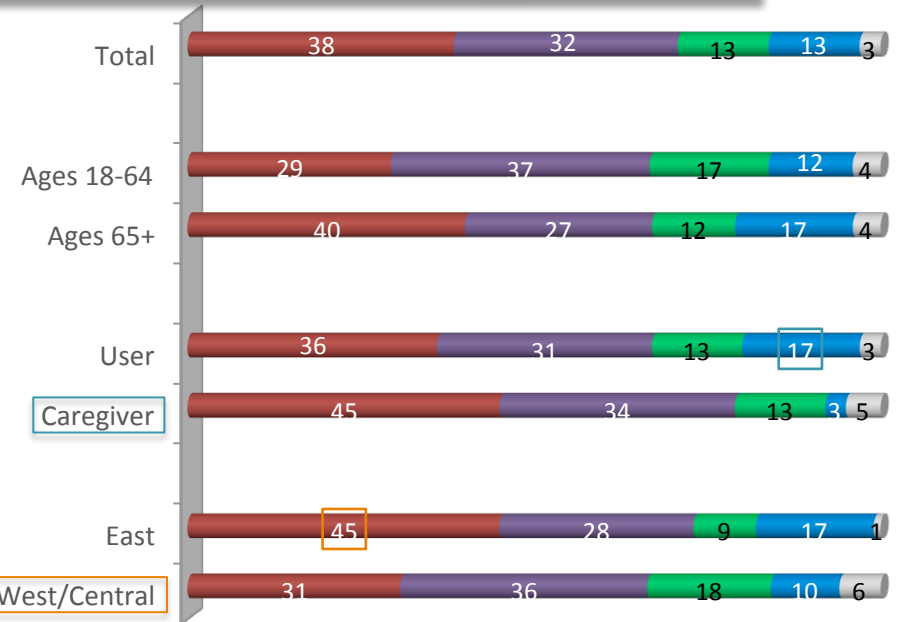
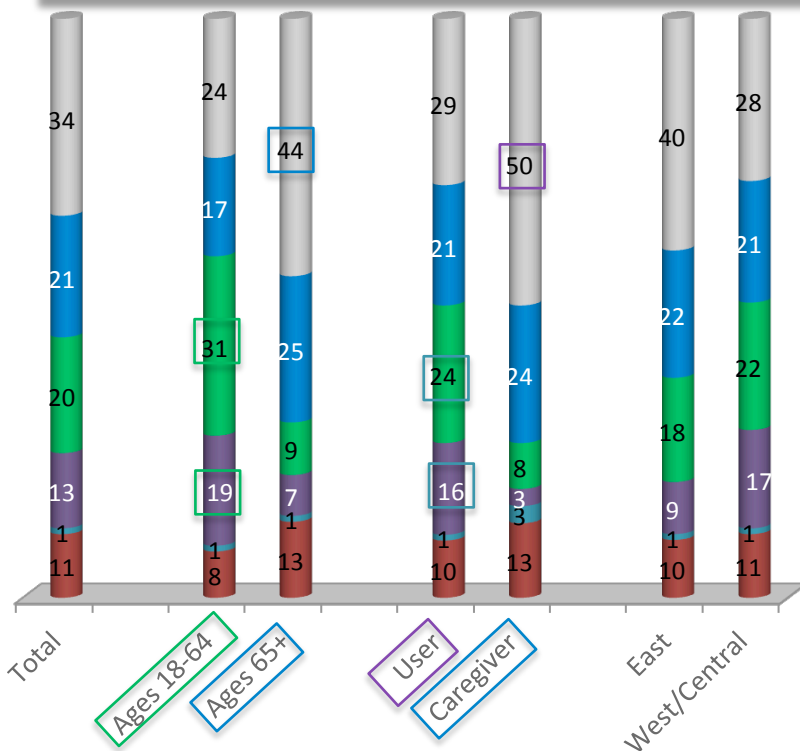


Respondent Profile

NATIONAL MOBILITY EQUIPMENT
DEALERS ASSOCIATION



Age (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Ages 18-29	23	45	-	25	24	19	26
Ages 30-44	20	40	-	14	37	8	33
Ages 45-64	7	15	-	9	3	6	8
Ages 65+	50	-	100	54	37	67	32



■ Under 5 years ■ 5-10 years ■ 11-15 years ■ 16-25 years ■ My entire life

■ Aging ■ Chronic Illness ■ Accident ■ War ■ Birth Defect ■ Other



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q28) What was the cause of [your/the] disability [for the person you care for]?

Q29) How long have [you/the person you care for] had this disability?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.
Over Users
Over Caregivers
Over East
Over West/Central

Respondent Profile

Mobility Aids Used (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Wheelchair	44	52	36	37	66	49	39
Scooter or power chair	29	28	31	31	24	32	26
Seating & restraints	9	16	3	9	11	4	15
Steering aids	9	19	-	6	18	8	11
Electronic controls	12	24	-	10	18	8	17
Lift into main vehicle cabin	9	19	-	8	13	8	11
Rear lift for scooter transportation on the vehicle exterior	6	7	5	6	5	8	4
Acceleration & Braking aids	8	12	4	8	8	5	11
Lowered floor conversion vehicle	7	13	-	7	5	4	10
Other	24	7	41	13	28	31	17
Caregivers – Relationship with Person They Care For (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Spouse	24	13	43	-	24	32	13
He/She is a Parent/Parent-in-law	37	38	36	-	37	41	31
He/She is my Child	3	4	-	-	2	-	6
He/She is Another Family Member	13	21	-	-	13	9	19
He/She is a Friend	18	21	14	-	18	14	25
Other	5	4	7	-	5	5	6



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)
Q30) Which of the following mobility aids do you/does the person you care for currently use?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Respondent Profile

Household Size (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
1	18	12	24	19	16	19	17
2	36	21	51	40	24	44	28
3	21	32	9	20	24	14	28
4+							
Average	2.7	3.1	2.3	2.6	3.0	2.5	2.9
Gender (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Male	47	44	49	48	42	47	46
Female	53	56	51	52	58	53	54
Employment (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Retired	46	7	85	52	29	59	32
Employed Full-time	25	48	3	22	34	13	39
Unemployed	6	9	3	6	5	8	4
Self-employed	4	4	4	4	5	5	3
Employed Part-time	13	20	5	11	18	12	14
Homemaker	3	7	-	3	5	3	4
Student	3	5	-	3	3	1	4
Financial Comfort (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
We are struggling to make ends meet	27	33	21	29	24	26	29
As long as we are very careful about our spending, we have enough money	48	47	49	45	58	53	43
We are comfortable and buy what we want, within reason	20	13	27	21	16	19	21
We are doing well financially/getting ahead	5	7	3	5	3	3	7



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q32) Including yourself, how many people live in your household?

Q35) What is your gender? Q34) Which one of the following best describes your employment status?

Q33) Thinking about your household income, which of the following statement best applies?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Respondent Profile

Household Income (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Under \$40,000	40	27	53	38	45	51	28
\$40,000 to \$69,999	30	31	29	33	21	23	38
\$70,000 to \$99,999	17	24	11	16	21	17	18
\$100,000 or above	13	19	7	13	13	9	17
Education (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
Some high school	1	3	-	2	-	-	3
High school diploma	16	15	17	14	21	14	18
Some college	28	17	39	33	13	29	26
College degree	41	53	29	38	50	38	44
Postgraduate degree	13	12	15	13	16	18	8
Ethnicity (%)	Total	18-64	65+	Users	Caregivers	East	West/Central
White/Caucasian	75	57	93	77	71	83	67
Black/African-American	8	15	1	8	8	5	11
Hispanic/Latino	5	7	3	4	8	1	8
Asian	9	17	1	9	11	10	8
Native American	1	1	-	-	3	-	1
Other	2	3	1	3		-	4



Driving Independence | NMEDA.com

Base: Total (150); 18-64 (75); Ages 66+ (75); Users (112); Caregivers (38); East (78); West/Central (72)

Q38) Which of the following best represents your annual household income?

Q39) What is the last year of schooling you have completed?

Q36) What is your race/ethnicity?

Over Ages 18-64
Over Ages 65+
Total

Significantly Higher Results: at 95% C.I.

Over Users
Over Caregivers
Over East
Over West/Central

Questions?

407-302-4416

Cheryl.Parker@evokad.com

