

Consumer Insights

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Medicare Consumer Snapshot: 2025 AEP Early Outlook

How's the 2025 AEP going so far? What are consumers thinking and feeling? Have possible plan and benefit changes, coupled with all the election noise, impacted their shopping behaviors? We wanted to find out!

Media Logic conducted a survey of 450 Medicare consumers aged 65-73, from October 7 to October 11. Here is a snapshot of what we learned.

Medicare Consumers Are Tuned In

The vast majority of respondents are dialed in and paying attention to both election- and Medicare-related news and advertising:

81%

pay moderate to tremendous attention to election-related ads and communications (4% pay no attention)

71%

pay moderate attention to Medicare-related ads and communications (7% pay no attention)

Election Impact on Medicare Shopping

The upcoming election has limited influence on Medicare shopping behavior:

56%

say the election **doesn't** impact their timing for Medicare shopping at all

16%

report a **slight** impact on timing

13%

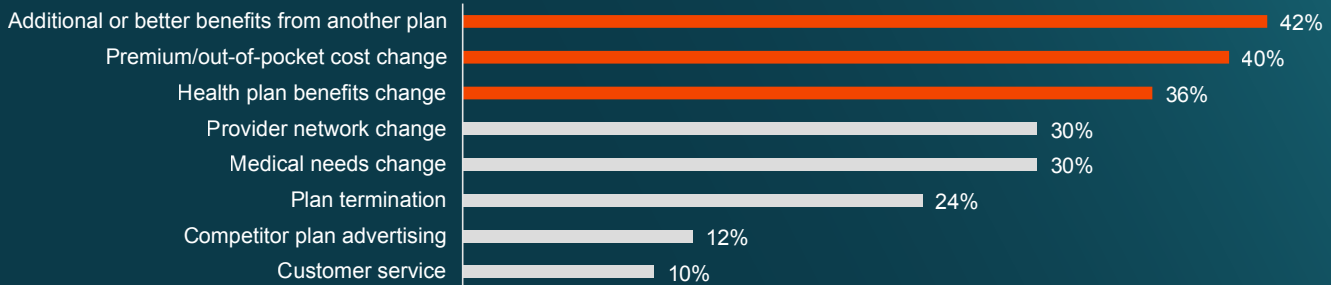
say it impacts their timing **"a lot"**



Disruption Drivers:

Cost, benefit, and network changes — plus plan terminations — may amplify 2025 AEP switching.

Q The following are **factors that might influence someone to consider making changes to their Medicare coverage** for 2025. Which of the following factors are relevant to your situation?



Medicare Shopping Timeline

Consumers are gathering information and shopping early for their 2025 Medicare options:

- › **Over one-third (36%)** of respondents have already completed their information gathering by October 15, and another 27% plan to by the end of October
- › **A smaller percentage** of respondents plan to shop in November (12%) or December (2%)
- › **17%** do not plan to shop at all, and **6%** are unsure

Decision-Making Timeline

Many respondents are deciding early or staying with their current plans:

- › **36%** have already decided to stay with their current plan
- › **4%** have already decided to enroll in a new plan
- › **24%** plan to decide by the end of October
- › **23%** will decide in November (after the election)
- › **Only 7%** plan to decide in December

Election Influence on Medicare Choice

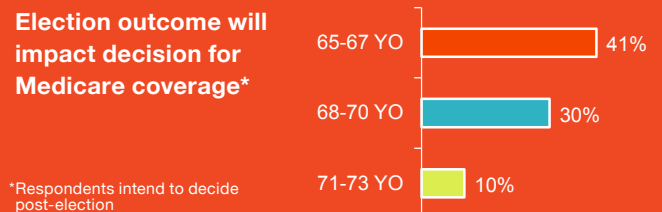
Of those who are waiting until after the election to make their decision, opinion is divided on whether the outcome will influence Medicare choices:

27%
believe it
will have an
influence

37%
believe it
won't have an
influence

36%
are unsure

A closer look at age segments indicates the youngest group (65- to 67-year-olds) showed the highest degree of election sensitivity relative to their Medicare 2025 plans:



* Respondents intend to decide post-election

Consumer In Sight (CIS) is an investigative research series conducted by Media Logic with the aim of gaining new insights into consumer preferences and behaviors in the healthcare and financial services industries. Using an industry-leading software platform, we survey geo-targeted and national panels to track the changing marketing landscape and support clients in connecting with consumers through creative executions and multichannel media.

Stay tuned for results from our mid-November survey to see how Medicare-eligible consumers' behavior changed over time.



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