



2019 MEDICARE SHOPPING AND SWITCHING STUDY

SENIOR MARKET INSIGHTS SERVICE

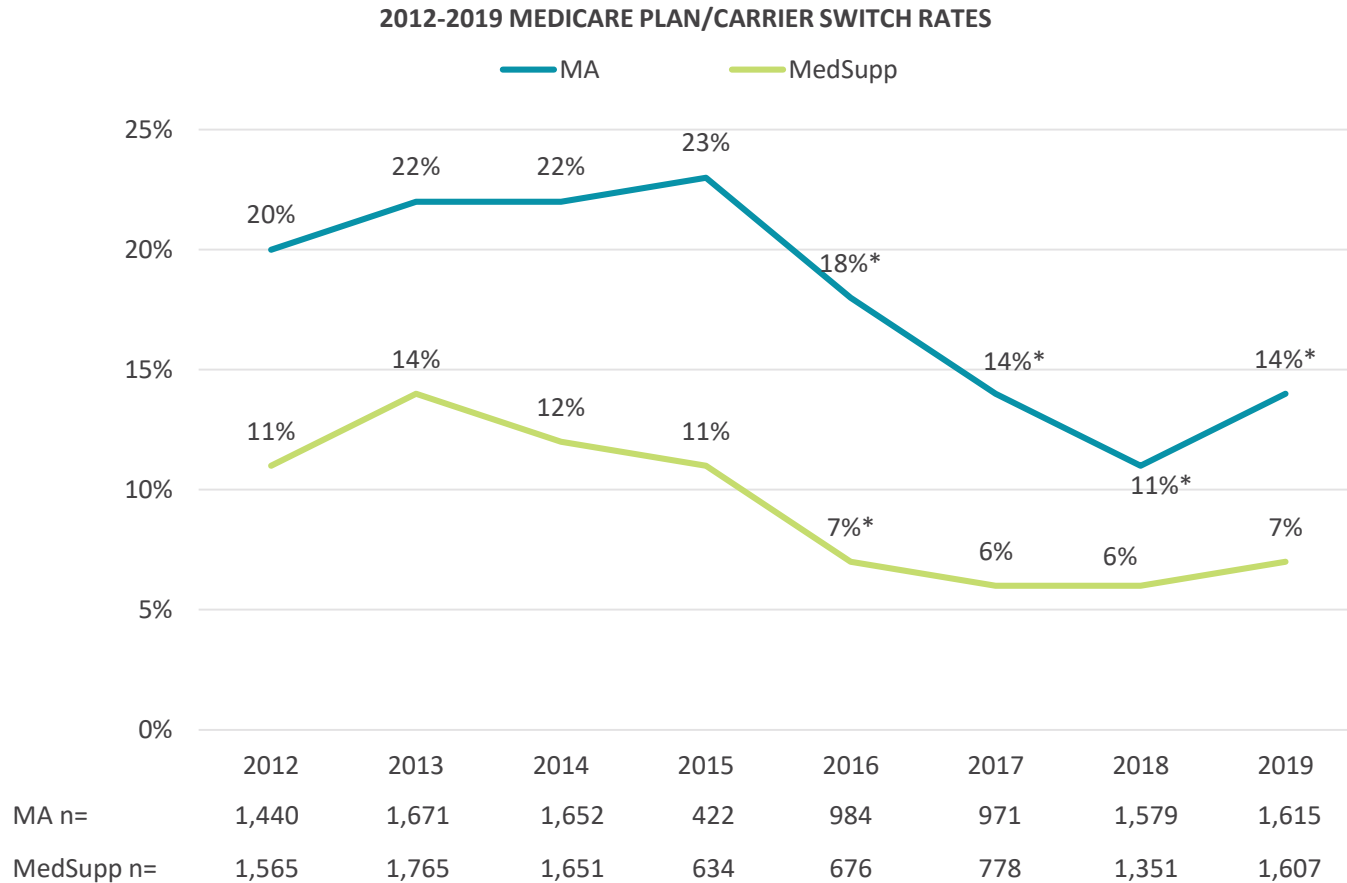
The information contained herein may be quoted, shared, or used externally with attribution to “Deft Research, 2019 Medicare Shopping and Switching Study.” All information is provided “as is” without any warranties, expressed, implied, or otherwise.

Table of Contents

Glossary of Terms	3
Study Overview	4
Key Findings	5
Market Landscape and Trends in Medicare Shopping and Switching	7
PDP Shopping and Switching	20
Reasons for Shopping and Switching	25
Medicare Shopping and Prompts	33
ANOC Drill-Down	39
Shopping Behaviors and Channel Utilization	43
Ad Recall	53
Preferences for Supplemental Benefits	61
2019 Enrollment	69
Appendix I: Consumer Demographic Profiles	74
Appendix II: Methods and Secondary Data	78

The Medicare Advantage switch rate has jumped back up to 2017 levels.

While the year-over-year switch rate for Medicare Advantage has increased, the rate of switching is still substantially lower than its peak in 2015. The 2019 switch rates for Medicare Advantage and MedSupp if Minnesota is held out for 2019 is still in line with the switch rates in 2017, at 13% and 7% respectively. The current MA switch rate is significantly higher than the MA switch rate (minus MN) observed in 2018.



* Asterisks indicate significant differences from the previous year.

What was your decision regarding your 2019 Medicare health coverage?

FOR MORE INSIGHTS INTO THE FULL 2019 MEDICARE SHOPPING
AND SWITCHING STUDY RESULTS, PLEASE EMAIL
INFO@DEFTRESEARCH.COM WITH THE SUBJECT LINE “2019 MSS.”