

BETTER MEDICARE ALLIANCE

Annual Seniors On Medicare Survey

DECEMBER 2020

BMA POLLING PRESENTATION

Key Findings

- 1. Two thirds (67%) of seniors on Medicare felt that they had enough information about Medicare Advantage when they first enrolled in Medicare, an 11% increase from 2019.
- A strong majority (95%) of seniors on Medicare believe it is important to have a choice of plans other than traditional Medicare. Four in five (79%) seniors on Medicare are aware of the differences between traditional Medicare, Medicare Advantage, and Medigap coverage.
- 3. Nearly all (98%) seniors on Medicare Advantage are satisfied with their Medicare Advantage coverage and with the way their Medicare Advantage plan has handled the COVID-19 pandemic (98%). Nearly all (97%) are satisfied with the network of doctors, hospitals, and specialists available in their Medicare Advantage plan.
- 4. Over half (57%) of seniors on Medicare Advantage are not familiar with the "Star Ratings" system. Those familiar with the system are unlikely to refer to it when selecting a Medicare Advantage plan.

- 5. Of a list of supplemental benefits provided by many Medicare Advantage plans, seniors on Medicare Advantage are most likely to have personally used vision (64%), dental (48%), telehealth (43%) and wellness (40%) coverage.
- 6. Seniors on Medicare Advantage care about maintaining public funding of Medicare Advantage. Three quarters (77%) of seniors on Medicare Advantage *strongly oppose* the federal government reducing the amount of money they contribute to Medicare Advantage. A strong majority (93%) also consider a candidate's support for Medicare Advantage important when casting their vote.
- 7. Seniors on Medicare Advantage who have used telehealth services during the COVID-19 pandemic are likely to have had a favorable telehealth experience (91%). Though three in five (60%) have not used telehealth services during the COVID-19 pandemic.

Methodology:

This poll was conducted online between December 11-17, 2020 among a national sample of 1,000 seniors on Medicare, including 500 seniors on Medicare Advantage. An oversample of 200 seniors on Medicare Advantage were collected for a total sample of n=1,217, including n=700 seniors on Medicare Advantage. Results from the full survey have a margin of error of +/-3%, and results among seniors on Medicare Advantage have a margin of error of +/-4%.

AGENDA

ENROLLING IN MEDICARE ADVANTAGE

AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

AWARENESS OF 'STAR RATINGS' SYSTEM

MEDICARE ADVANTAGE UTILIZATION & SUPPORT

ENROLLING IN MEDICARE ADVANTAGE

Two thirds (63%) of seniors on Medicare had enough information about Medicare Advantage when they first enrolled in Medicare, an 11% increase from 2019.

Thinking about when you first enrolled in Medicare, would you have liked to have known more about the option of Medicare Advantage?

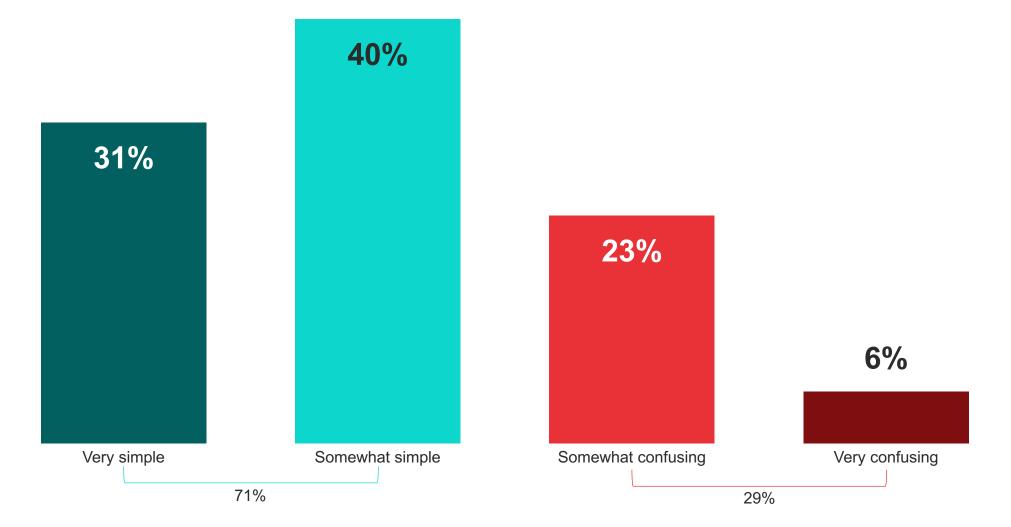
| | 63% | | |
|--------|---|---|-----------------------|
| | | 30% | |
| | | | 7% |
| | No, I had enough information about Medicare Advantage | Yes, I would have liked to have known more about Medicare Advantage | Don't know/No opinion |
| . 2019 | +11% | -2% | -8% |

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ENROLLING IN MEDICARE ADVANTAGE

Seven out of 10 (71%) seniors on Medicare found the process of enrolling for Medicare coverage simple, while 29% found it confusing .

Thinking about the process of enrolling for Medicare coverage, how simple or confusing was your enrollment experience?



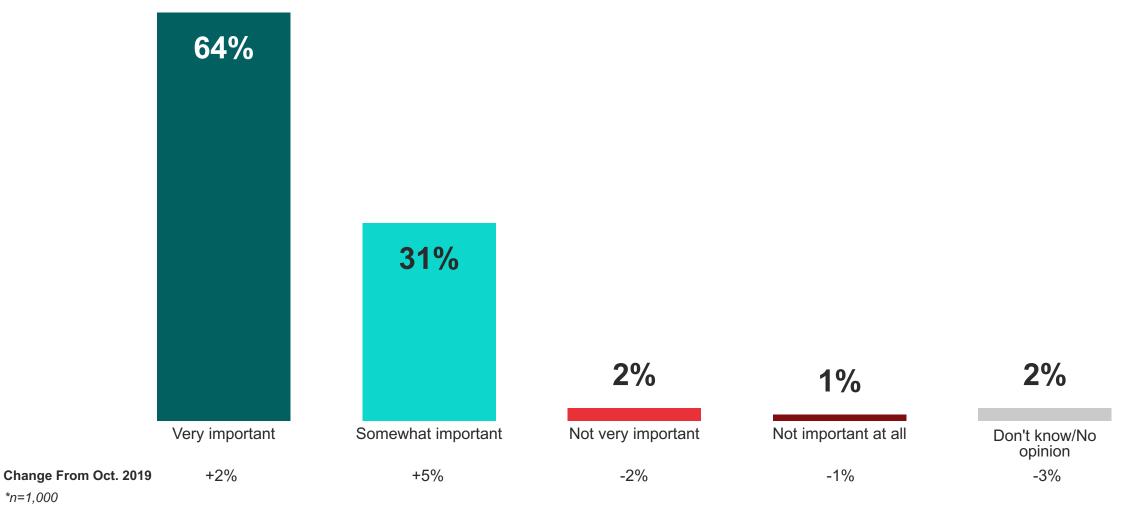
*n=1.000

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ENROLLING IN MEDICARE ADVANTAGE

A strong majority (95%) of seniors on Medicare believe it is important to have a choice of plans other than traditional Medicare, a 7% increase from 2019.

How important is it for you and other seniors to have the choice of plans other than traditional Medicare, such as Medicare Advantage plan?



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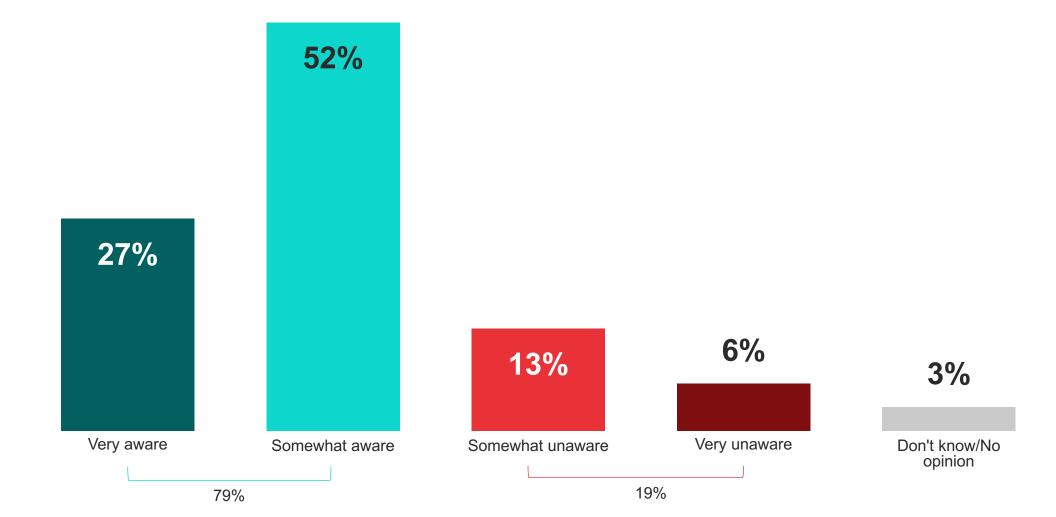


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AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

Four in five (79%) seniors on Medicare are aware of the differences between traditional Medicare, Medicare Advantage, and Medigap coverage.

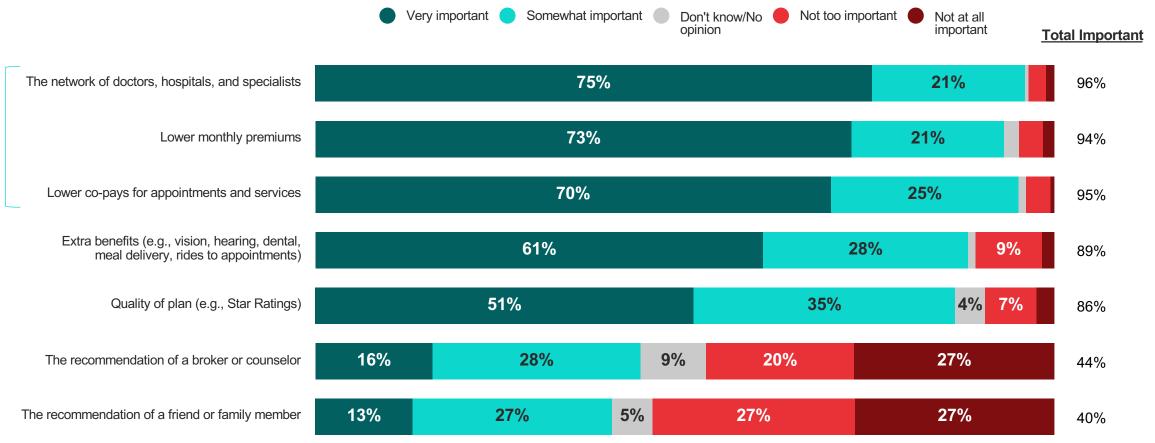
How aware or unaware are you with the differences between traditional Medicare, Medicare Advantage, and Medigap coverage?



AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

Seniors on Medicare Advantage were most likely to consider their network of doctors, hospitals and specialists (96%), lower monthly premiums (94%), and lower co-pays for appointments and services (95%) when they selected a Medicare Advantage plan.

Thinking about when you selected a Medicare Advantage plan, how important, if at all, were each of the following?

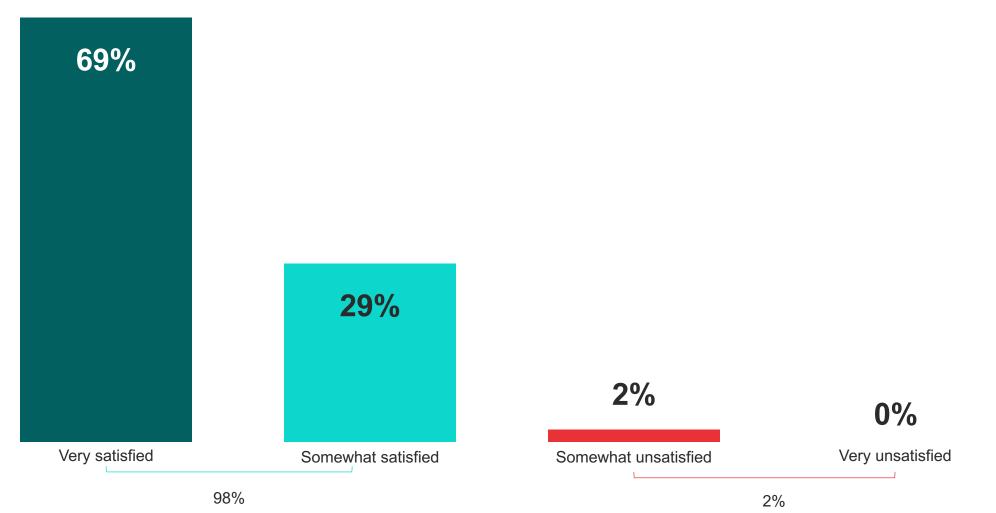


*n=700

AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

Nearly all (98%) seniors on Medicare Advantage are satisfied with their Medicare Advantage coverage.

How satisfied or unsatisfied are you with your Medicare Advantage coverage?

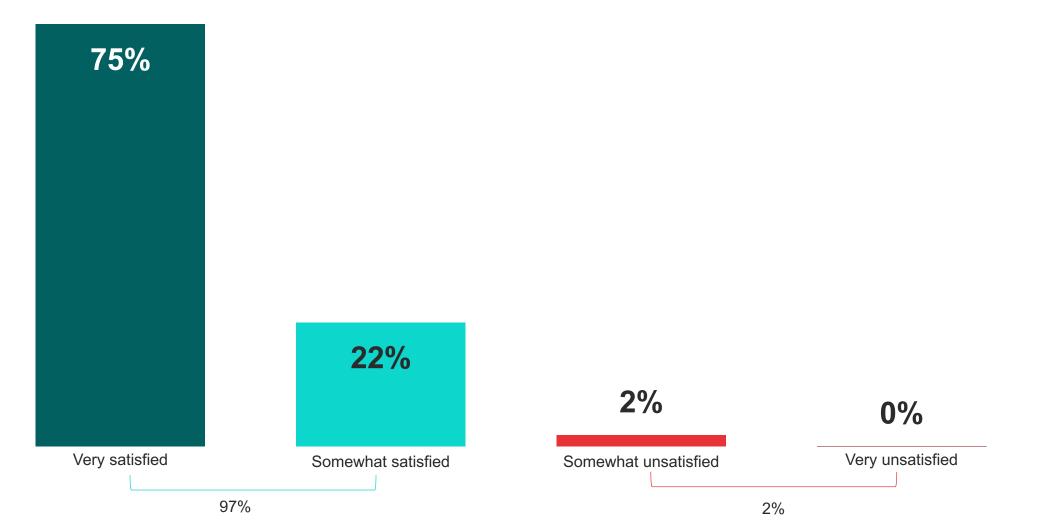


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AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

Nearly all (97%) of seniors on Medicare Advantage are satisfied with the network of doctors, hospitals, and specialists available in their plan.

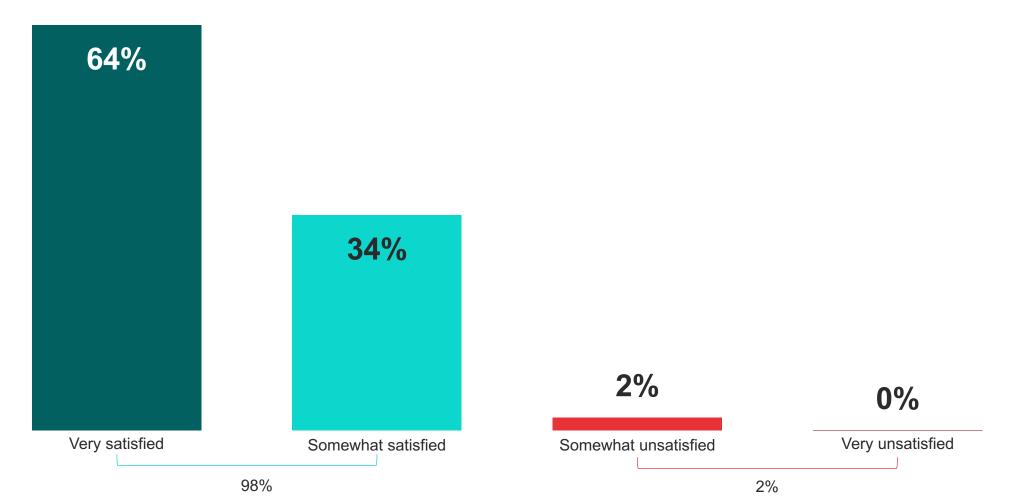
How satisfied or unsatisfied are you with the network of doctors, hospitals, and specialists available in your Medicare Advantage plan?



AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

Nearly all (98%) seniors on Medicare Advantage are satisfied with the way their Medicare Advantage plan has handled the COVID-19 pandemic, including 64% who are *very satisfied*.

How satisfied or unsatisfied are you with how your Medicare Advantage plan has handled the COVID-19 pandemic?



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ENROLLING IN MEDICARE ADVANTAGE

AWARENESS & SATISFACTION WITH MEDICARE ADVANTAGE

AWARENESS OF 'STAR RATINGS' SYSTEM

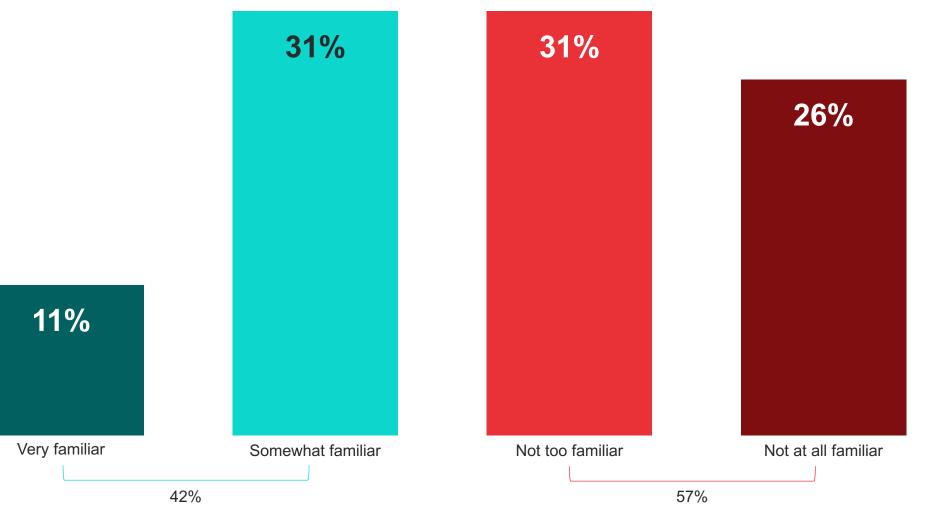
MEDICARE ADVANTAGE UTILIZATION & SUPPORT



AWARENESS OF 'STAR RATINGS' SYSTEM

Over half (57%) of seniors on Medicare Advantage are not familiar with the 'Star Ratings' system used by the government to grade Medicare Advantage plans on quality.

Are you familiar are you with the 'Star Ratings' system used by the government to grade Medicare Advantage plans on quality?

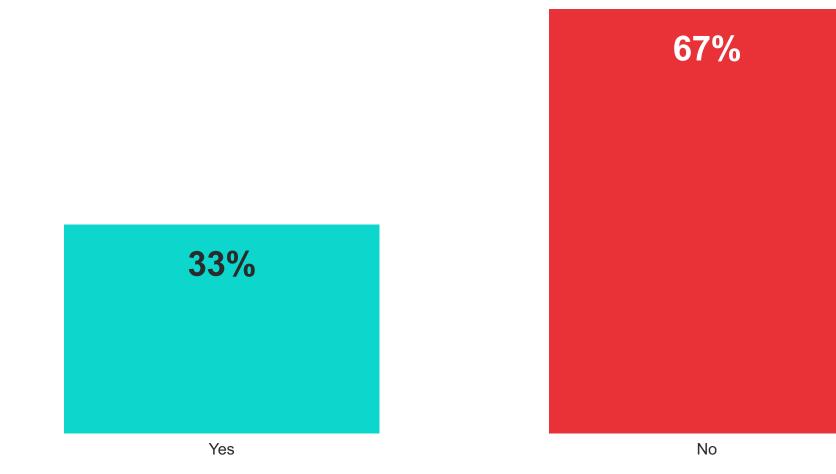


*n=700

AWARENESS OF 'STAR RATINGS' SYSTEM

Among those familiar, 1 in 3 seniors on Medicare Advantage referred to the 'Star Ratings" system when selecting a Medicare Advantage plan.

Did you refer to the 'Star Ratings' system when selecting a Medicare Advantage plan?



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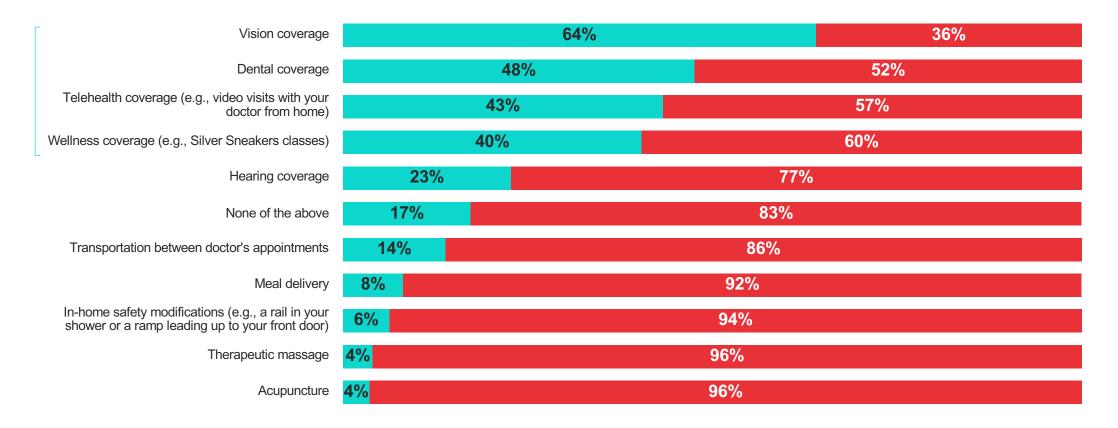
MEDICARE ADVANTAGE UTILIZATION & SUPPORT



MEDICARE ADVANTAGE UTILIZATION & SUPPORT

Of a list of supplemental benefits provided by many Medicare Advantage plans, seniors on Medicare Advantage are most likely to have personally used vision (64%), dental (48%), telehealth (43%), and wellness coverage (40%).

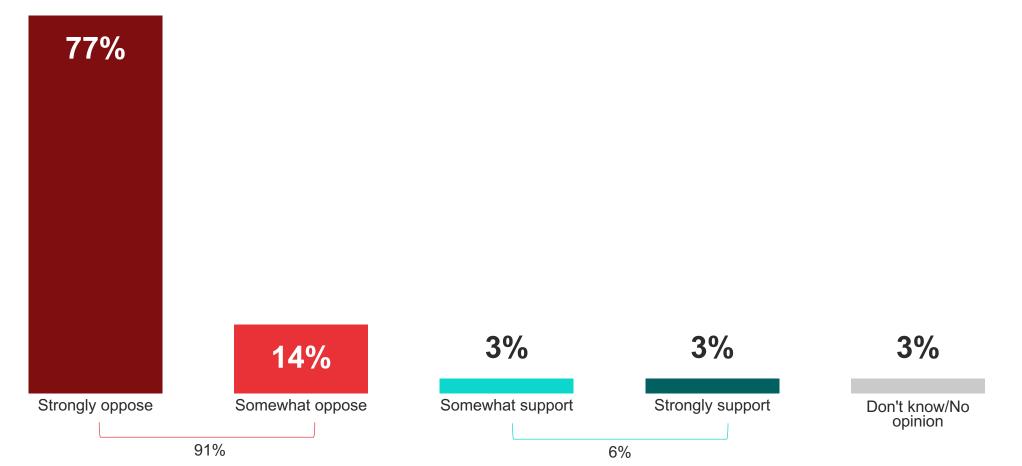
The following is a list of supplemental benefits that may be provided by many Medicare Advantage plans. Please select all the benefits that you have personally used.



MEDICARE ADVANTAGE UTILIZATION & SUPPORT

Three quarters (77%) of seniors on Medicare Advantage *strongly oppose* the federal government reducing the amount of money they contribute to Medicare Advantage.

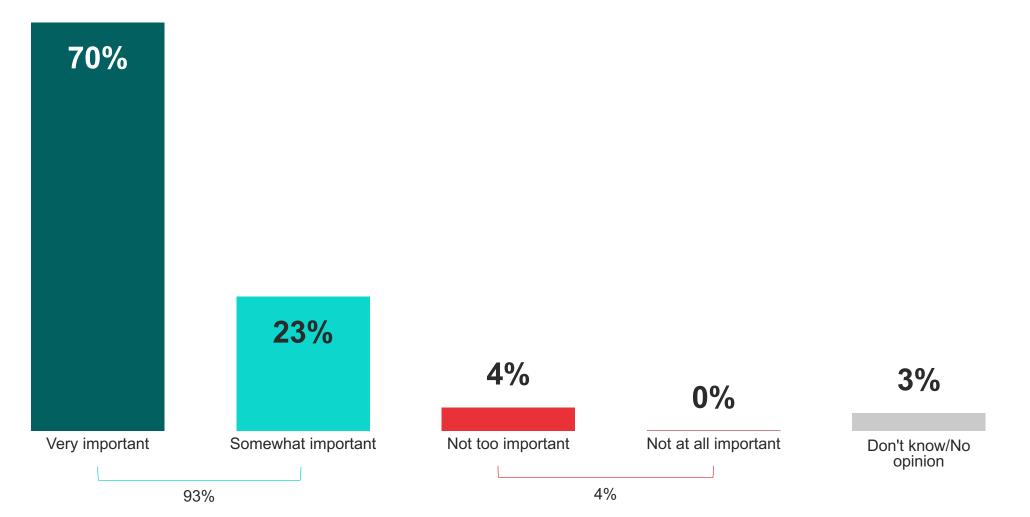
As you may know, Medicare Advantage depends on payments from the federal government to keep premiums low and provide extra benefits to seniors. As you may know, some have recommended the federal government reduce the amount of money they are contributing to Medicare Advantage, which could possibly raise premiums and cut benefits, in order to lower costs for taxpayers and reduce the national debt. Based on what you know, do you support or oppose the federal government reducing the amount of money they contribute to Medicare Advantage?



MEDICARE ADVANTAGE UTILIZATION & SUPPORT

A strong majority (93%) of seniors on Medicare Advantage say a candidate's support for funding Medicare Advantage is important when casting their vote.

Thinking about your vote, how important, if at all, is a candidate's support for funding Medicare Advantage when you cast your vote?

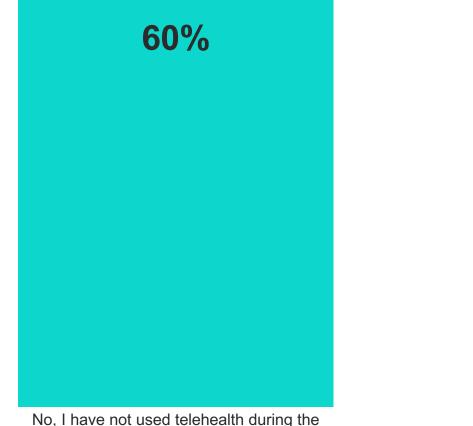


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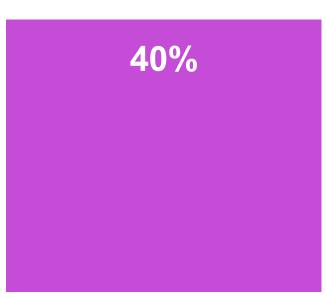
MEDICARE ADVANTAGE UTILIZATION & SUPPORT

Three in five (60%) seniors on Medicare Advantage have *not* used telehealth services during the COVID-19 pandemic.

Have you used telehealth services, such as a video call with your doctor, since the start of the COVID-19 pandemic to receive health care?



COVID-19 pandemic



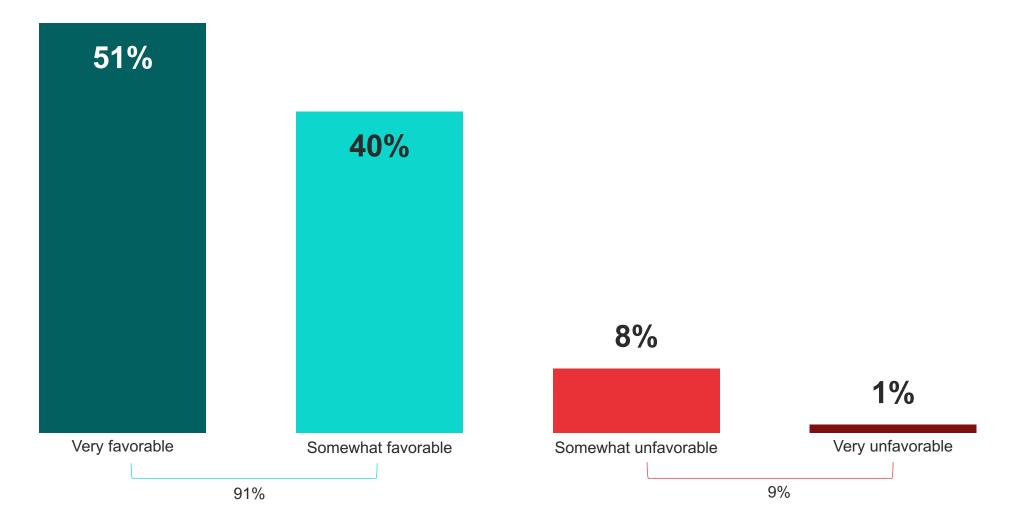
Yes, I have used telehealth services during the COVID-19 pandemic

MEDICARE ADVANTAGE UTILIZATION & SUPPORT

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Among those who have used telehealth services during the COVID-19 pandemic, 9 in 10 seniors on Medicare Advantage had a favorable telehealth experience.

Did you have a favorable or unfavorable telehealth experience?



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