

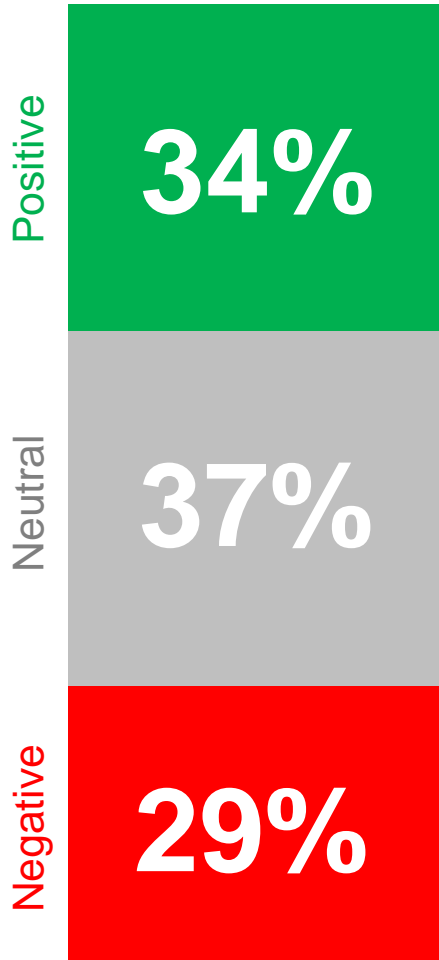
# Breaking Bad

Adults 50+: Understanding the  
demo that drives your business

April 18, 2018



## Elevate Consumer Opinion



Compared to people with a neutral or negative impression, people with a positive impression are...

**74%** more likely to pay a lot of attention to DTC ads

**78%** more likely to take action after seeing a DTC ad

# Embrace the Market





## Rapid Change in 50+ Market Will Stimulate Rx Growth

### By 2028, the 50+ population will grow +15 million

- Age 50-59 -3M
- Age 60-69 +3M
- **Age 70+ +15M**

### Significant impact on Rx because 70+ are biggest users

- Age 50-59 72% use 3.7 avg. # used
- Age 60-69 77% 4.1
- **Age 70+ 90% 5.0**

### As a result, prescription use will increase 90 million

- Age 50-59 -13M
- Age 60-69 +13M
- **Age 70+ +90M**

### And Rx market share will shift significantly

- Age 50-59 from 32% to 26%
- Age 60-69 30% 28%
- **Age 70+ 38% 46%**

# Age Segments Face Different Health Challenges

## Increased Incidence of Diseases/Conditions by Age



### 50s

Menopause	+281%
Diabetes Type 2	+120%
Osteoarthritis	+99%
Erectile dysfunction	+54%
Dry Eye	+28%
Depression	+22%



### 60s

Heart disease/attack	+85%
Osteoarthritis	+71%
High cholesterol	+70%
Diabetes Type 2	+58%
Hypertension	+50%
Diabetes Type 1	+49%



### 70+

Overactive bladder	+163%
Hearing loss	+123%
Osteoporosis	+90%
Cancer	+89%
Heart disease/attack	+66%
Kidney ailments	+53%



## Embrace Age 50-59



### **Focus on Prevention**

Easy, reliable, efficient and low-cost health solutions that enable them manage minor health concerns and prevent more serious ones.

- On the go 24/7, time constrained, sleep deprived
- Juggling jobs, kids, caregiving, personal interests, financial responsibilities
- Some chronic issues may arise, but serious conditions yet to come
- May have experienced illness/death of a parent
- Managing health seen as necessary, but need it to fit within their busy lives
- Eating well, weight management, annual physical
- Highly focused on keeping healthcare costs low

## Embrace Age 60-69



### **Focus on Maintenance**

Reliable products and knowledge that instill confidence in their ability to maintain their current lifestyle in spite of while dealing with more serious health challenges.

- Experiencing many significant life events
- Winding down careers, seeking second careers, retirement, volunteering
- Self interests become a priority as free time opens up
- May be caretaking parent/older relative
- Fears about effects of aging on health
- Facing more serious/chronic conditions, seeing the same in spouse/peers
- Are striving to keep health conditions from interfering with their pursuit of personal interests

## Embrace Age 70+



### **Focus on Management**

Health solutions that allow them to feel truly cared about and taken seriously, and that enable them to feel a sense of satisfaction from doing all they can to successfully manage their health.

- Can't do what they used to, but still seeking to get the most out of life
- Retired, working part-time, volunteering
- Accept aging and health challenges that come with it
- Make the daily effort to stay well
- Seeking to stay positive, mentally alert, active, pain-free
- Find enjoyment in managing their health
- Are proactive about doctor visits, screenings, prevention



# Motivate Consumer Action



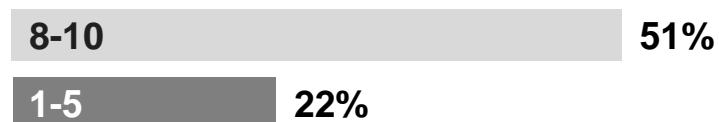
## 50+ Proactively Address Health Challenges



### Health Status

Scale: From 10 (excellent) to 1 (poor)

#### Now

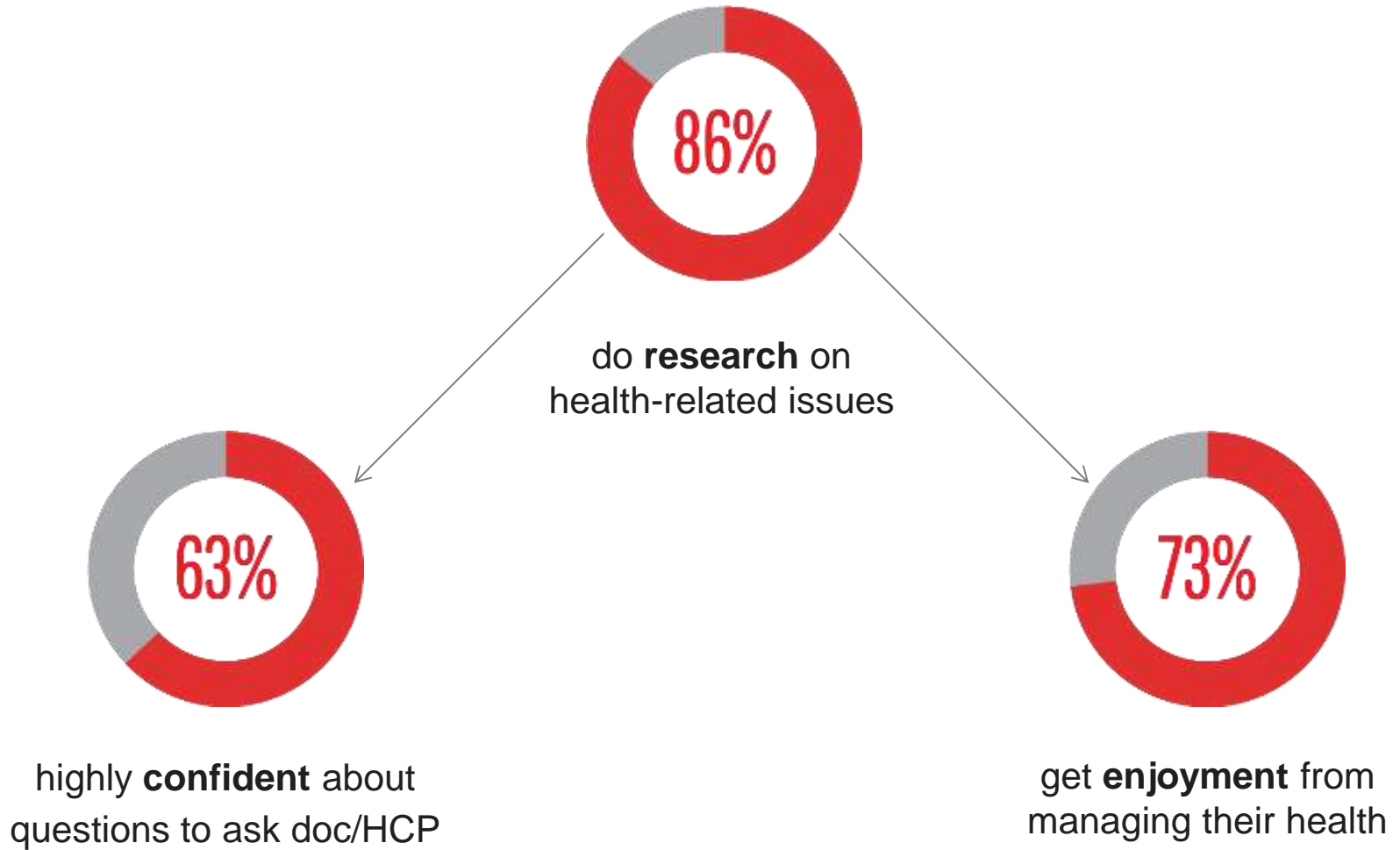


#### 10 years ago

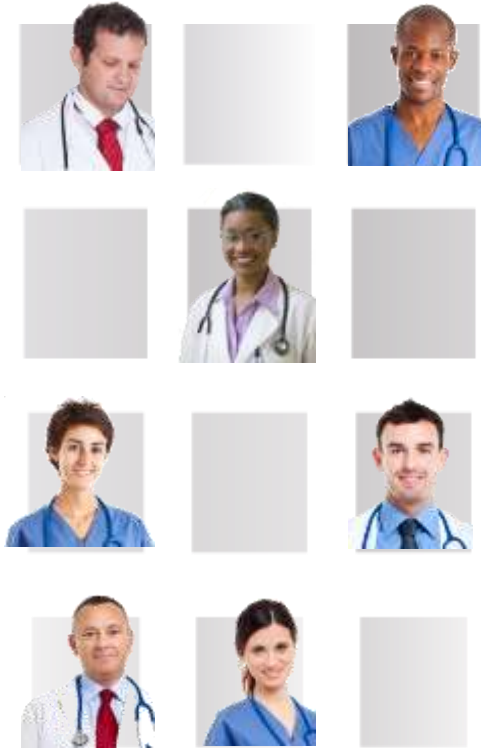


**2 in 3 do “a lot” or as much as possible to manage their health**

# Gathering Information is a Priority



# Doctors/HCPs Most-Trusted Information Source



## Annual Doctor/HCP Visits Percent Who Visit

Primary Care Physician (2.6 times/year)



Specialist (2.3 times/year)



Healthcare Professional (2.0 times/year)



# Doctors Just One of Many Health Information Sources

# 18

# of health information sources valued by people 50+

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## The Most Valued List\*

### People

- Doctor
- Pharmacists
- Nurses/PAs
- Friends, family

### Printed Materials

- Health-related publications
- Magazine articles
- Medical Journals
- Newspaper articles

### Point of Care/HCP

- Brochures/pamphlets in office
- Brochures, wallboards, etc. in exam room

### Online

- Search engine results
- Health information websites
- Health condition websites

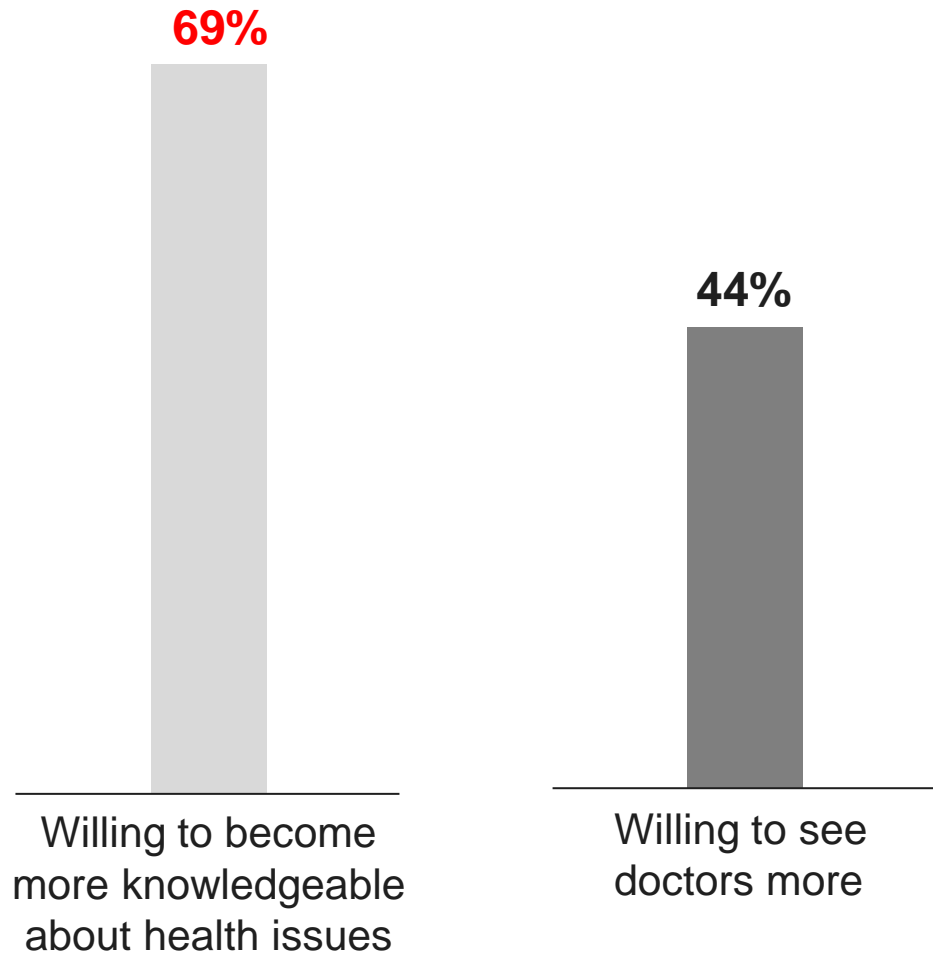
### Other

- Medication packaging, labels
- Condition, health-related events

## 50+ Willing to Learn More to Achieve Optimal Health

**9 in 10**

are interested in doing more to gain control over their health





# Role of DTC Ads in the 50+ Purchase Journey



## Consumer response to DTC ads in the last 12 months

Had some doctor interaction



Learned something new about a drug or condition



Visited product/drug company web site



Developed a better impression of drug or company



Took no action



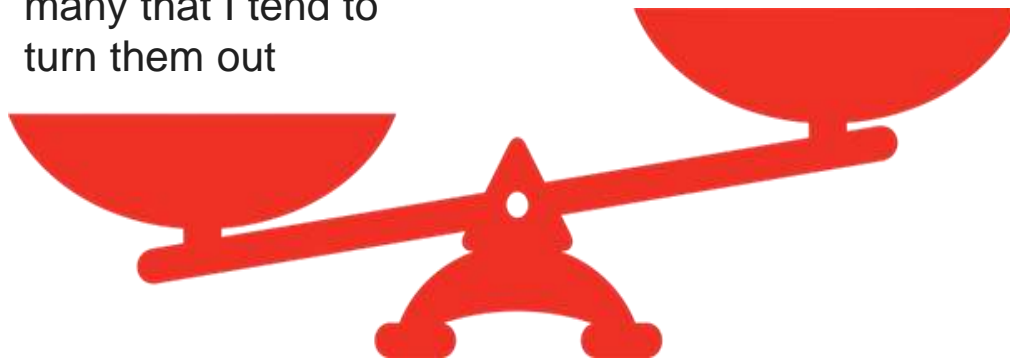
## 50+ Attitude Toward DTC Ads on TV

**18%** they are personally relevant

**28%** they represent realistic situations

**42%** they are somewhat or more useful

**53%** there are so many that I tend to turn them out



## Motivate Consumer Action Through Information



**9 in 10**

would value a checklist of topics to discuss with doctor/HCP in order to feel comfortable using a new Rx

# What Consumers Want to Know Before Taking New Rx

	Important %
✓ How to know if the drug is working as it should	85
✓ How to properly use medication, the risks of missing a dose	85
✓ Understanding the condition and how it might affect overall health	84
✓ Dealing with side effects and minimizing their effect on lifestyle	81
✓ How to talk to a doctor/HCP about how medication is affecting you	77
✓ Understanding all prescriptions that might treat your prescriptions	75
✓ How to control/cut the cost of medications	59
✓ Things to share with family/caregivers about your condition/treatment	51
Learning about other patient experiences so you know what to expect	43

# What Doc/HCP Discussed Last Time New Rx Was Prescribed

	Important %	Discussed %
How to know if the drug is working as it should	85	28
✓ How to properly use medication, the risks of missing a dose	85	50
✓ Understanding the condition and how it might affect overall health	84	59
Dealing with side effects and minimizing their effect on lifestyle	81	32
How to talk to a doctor/HCP about how medication is affecting you	77	30
Understanding all prescriptions that might treat your prescriptions	75	45
How to control/cut the cost of medications	59	11
Things to share with family/caregivers about your condition/treatment	51	7
Learning about other patient experiences so you know what to expect	43	8

# Opportunity for DTC Marketers

	Important %	Discussed %	Gap %
✓ How to know if the drug is working as it should	85	28	57
✓ How to properly use medication, the risks of missing a dose	85	50	35
✓ Understanding the condition and how it might affect overall health	84	59	26
✓ Dealing with side effects and minimizing their effect on lifestyle	81	32	49
✓ How to talk to a doctor/HCP about how medication is affecting you	77	30	47
✓ Understanding all prescriptions that might treat your prescriptions	75	45	30
✓ How to control/cut the cost of medications	59	11	48
✓ Things to share with family/caregivers about your condition/treatment	51	7	44
✓ Learning about other patient experiences so you know what to expect	43	8	35



# DTC Opportunity

The 50+ market is growing and aging, and producing unprecedented opportunity for DTC marketers.

**Now is the time to rethink the conventional wisdom that DTC ads on TV are enough.**

TV ads can raise awareness, but they are limited in driving consumers through their purchase journeys.

Creating marketing that speaks to consumers at specific health and life stages will create greater engagement.

Empowering consumers with critical information will:

- increase doctor/HCP interactions
- better prepare consumers to have conversations with doctors/HCPs
- develop stronger, more positive relationships with consumers

## 3 Ways to Stay in Touch

### 1. For real time updates

– join our LinkedIn showcase page

<https://www.linkedin.com/showcase/aarp-media-sales/>

### 2. For thought leadership articles

– visit our website

<http://advertise.aarp.org/>

### 3. For a custom insights opportunity

– contact a sales rep

<http://advertise.aarp.org/contact>



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