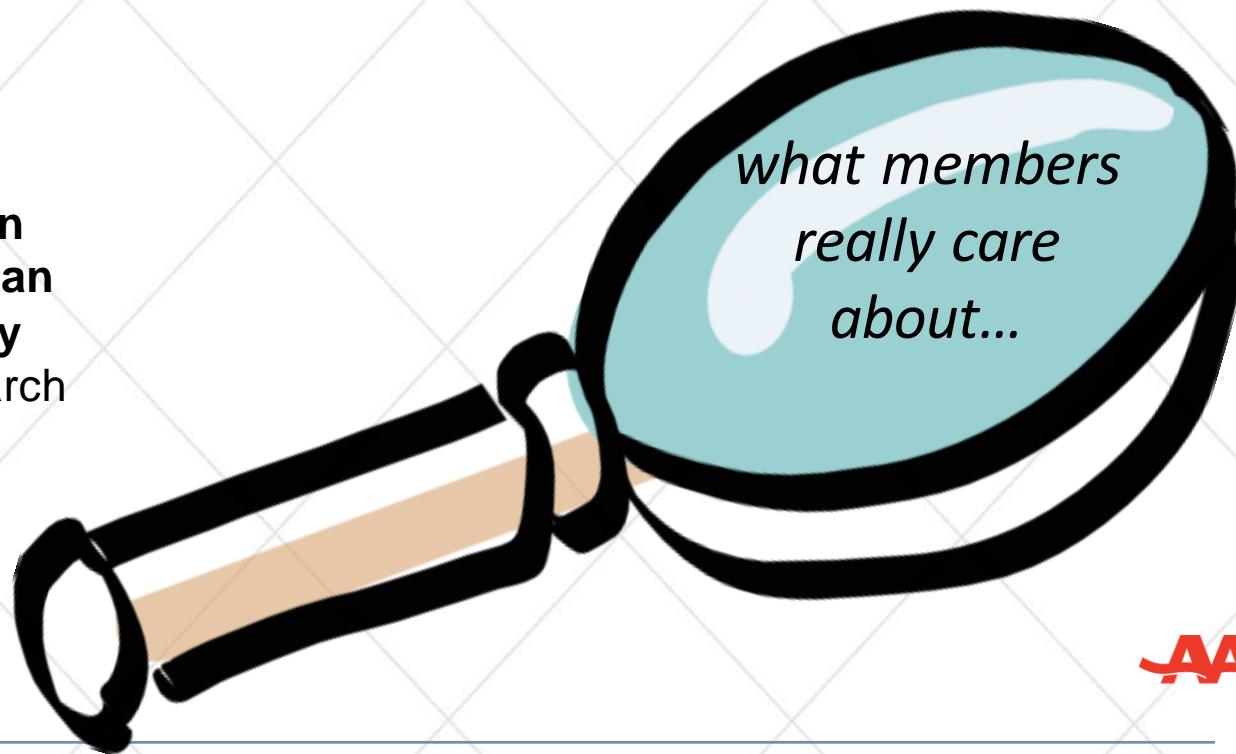


2016 Member Opinion Survey

Initial Impressions/Insights

Deb Whitman
Rebecca Gillan
John Hagerty
AARP Research
August 2016



Agenda

- ❑ Background & Methodology
- ❑ Critical Highlights
- ❑ Summary & Insights

2016 MOS Team

AARP
Research
SVP:

Becky
Gillan

Project
Lead:

John
Hagerty

Team Members and Critical Contributors

Ed Evans

Kate Bridges

Karen Turner

Sonya Gross

Rachelle
Cummins

Sarah
Kerman

John Fries

Jennifer
Leslie

Willieree
Murray

Terry Keenan

Jean Koppen

Background & Methodology

Background

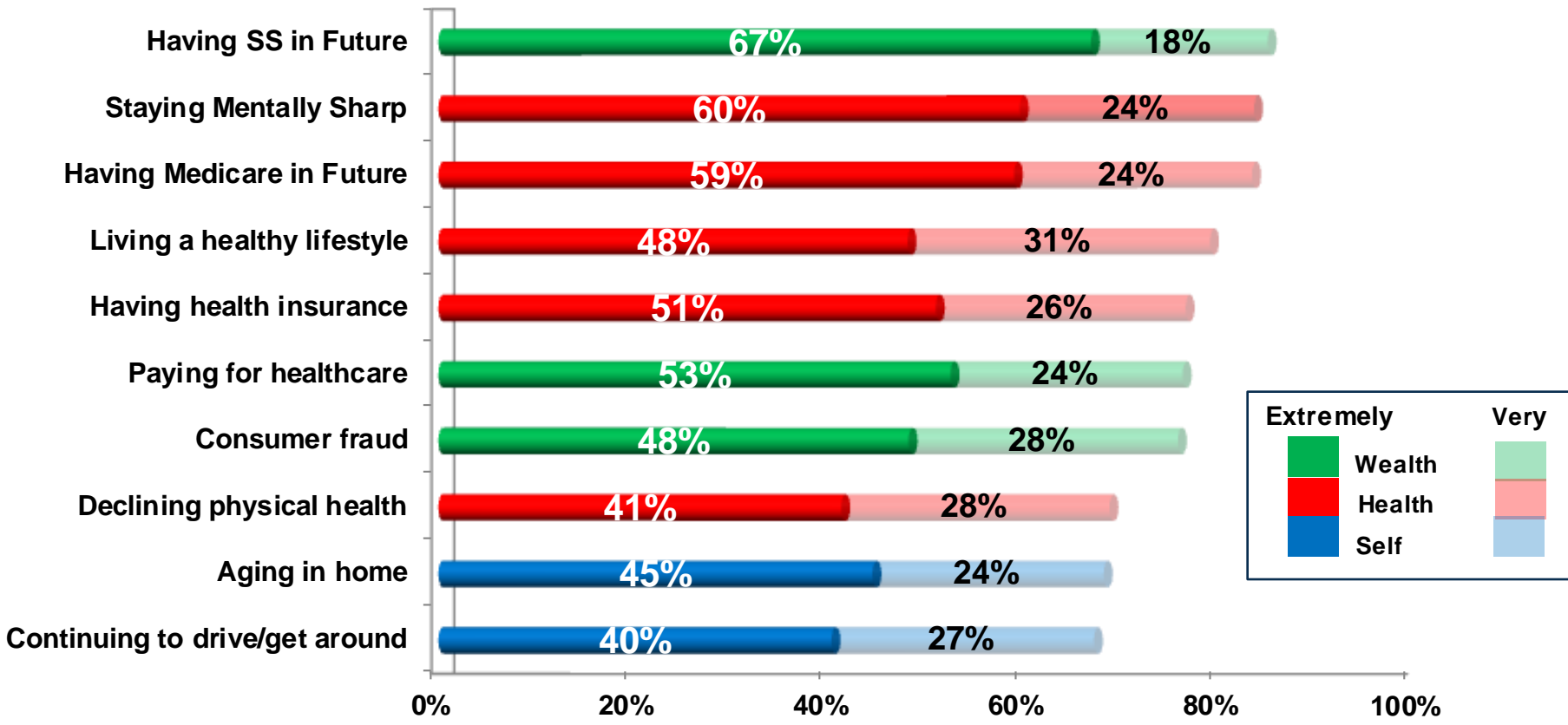
- ❑ MOS fields every few years since 1994 – last fielded in 2012
- ❑ Dual mode survey (mail and online), capturing a variety of member information such as interests, concerns, life events, civic participation, technology use, and demographics
 - ❑ Survey offered in 5 languages (Chinese, Vietnamese, Filipino, Spanish, English)
- ❑ 23,000 responses provide opportunities to compare responses across multiple segments and key membership groupings (ages, incomes, MCL, engagement)
 - ❑ Ipsos was vendor utilized
 - ❑ Field dates are April 17 – July 8, 2016
- ❑ Used by AARP in a variety of ways
 - ❑ Strategic planning - deep understanding of members concerns and interests, their relationship to AARP, and demographic shifts
 - ❑ Segmentation strategy
 - ❑ Membership data strategy/modeling
 - ❑ Modeling for direct marketing
- ❑ This presentation will focus on overall membership views with future analysis diving deeper into segments and more complex modeling analysis

Critical Highlights

Top concerns are consistent from previous waves of MOS and focused around health/money



Top Concerns (extremely/very concerned)



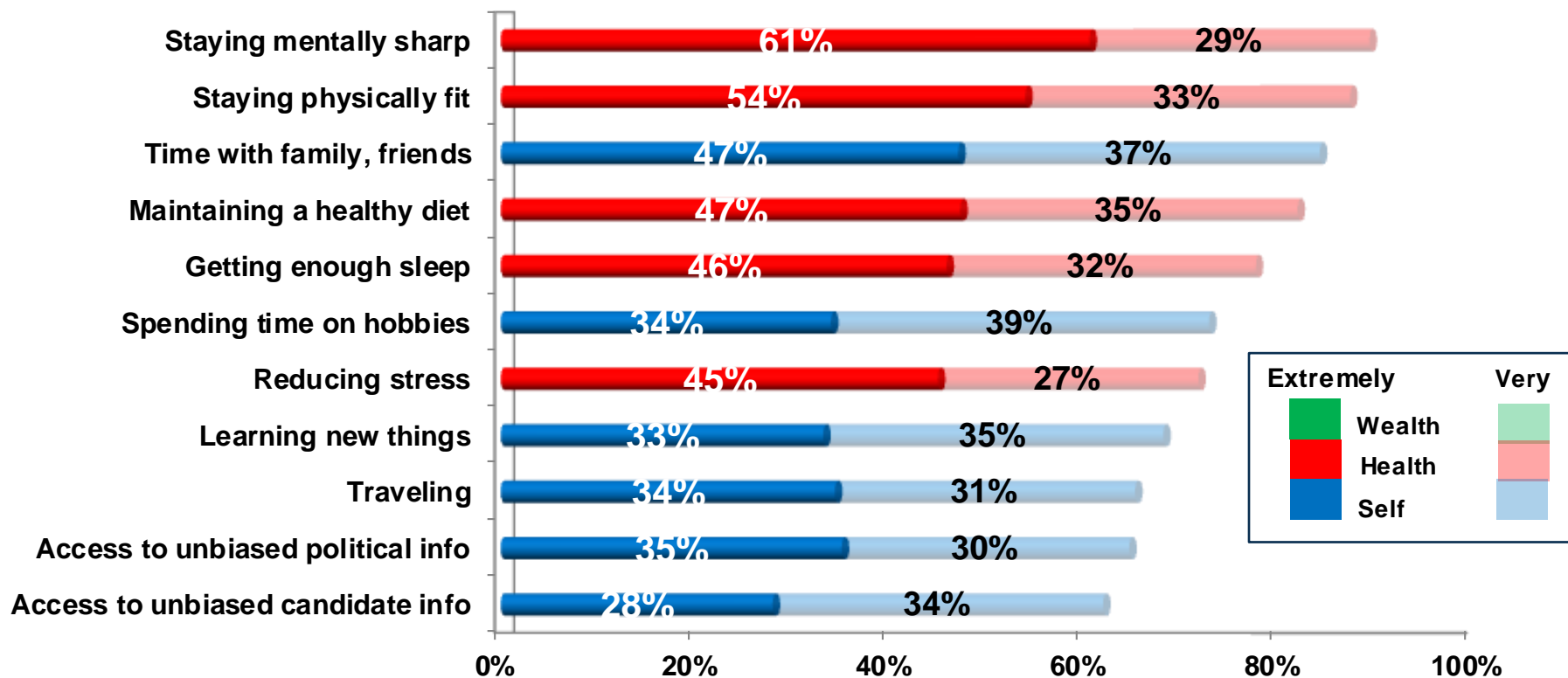
- Having access to Social Security in the future is the top concern for members, with Staying Mentally Sharp and Medicare not too far behind

Question Q15: Please rate your own level of concern about the following issues?

Top interests are consistent with previous waves and focused around health and self



Top Interests (extremely/very interested)

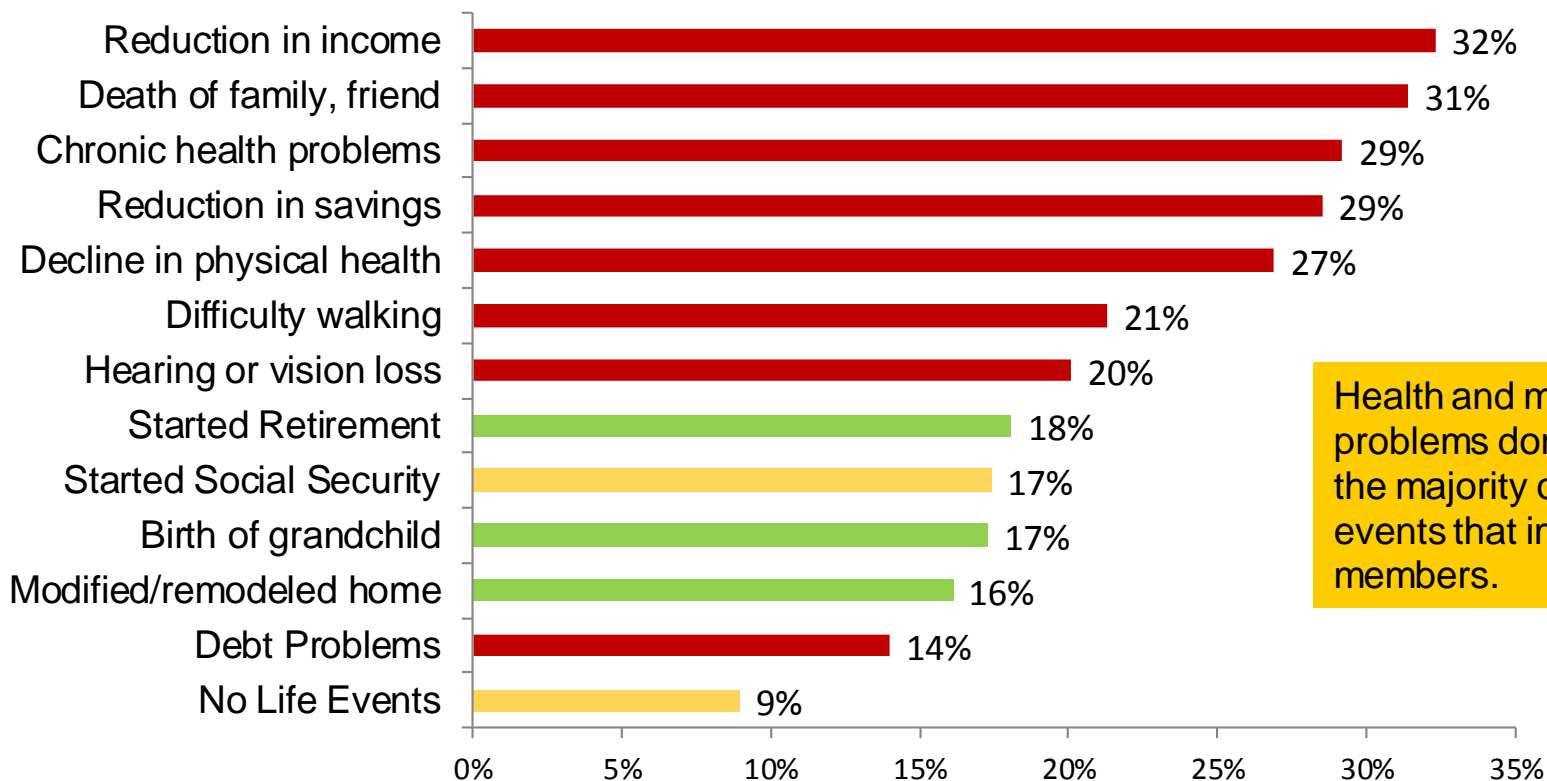


- Staying mentally sharp and physically fit are the top two interests followed by spending time with family/friends and maintaining a healthy diet

The most common life events are typically negative in nature and have been consistent over time



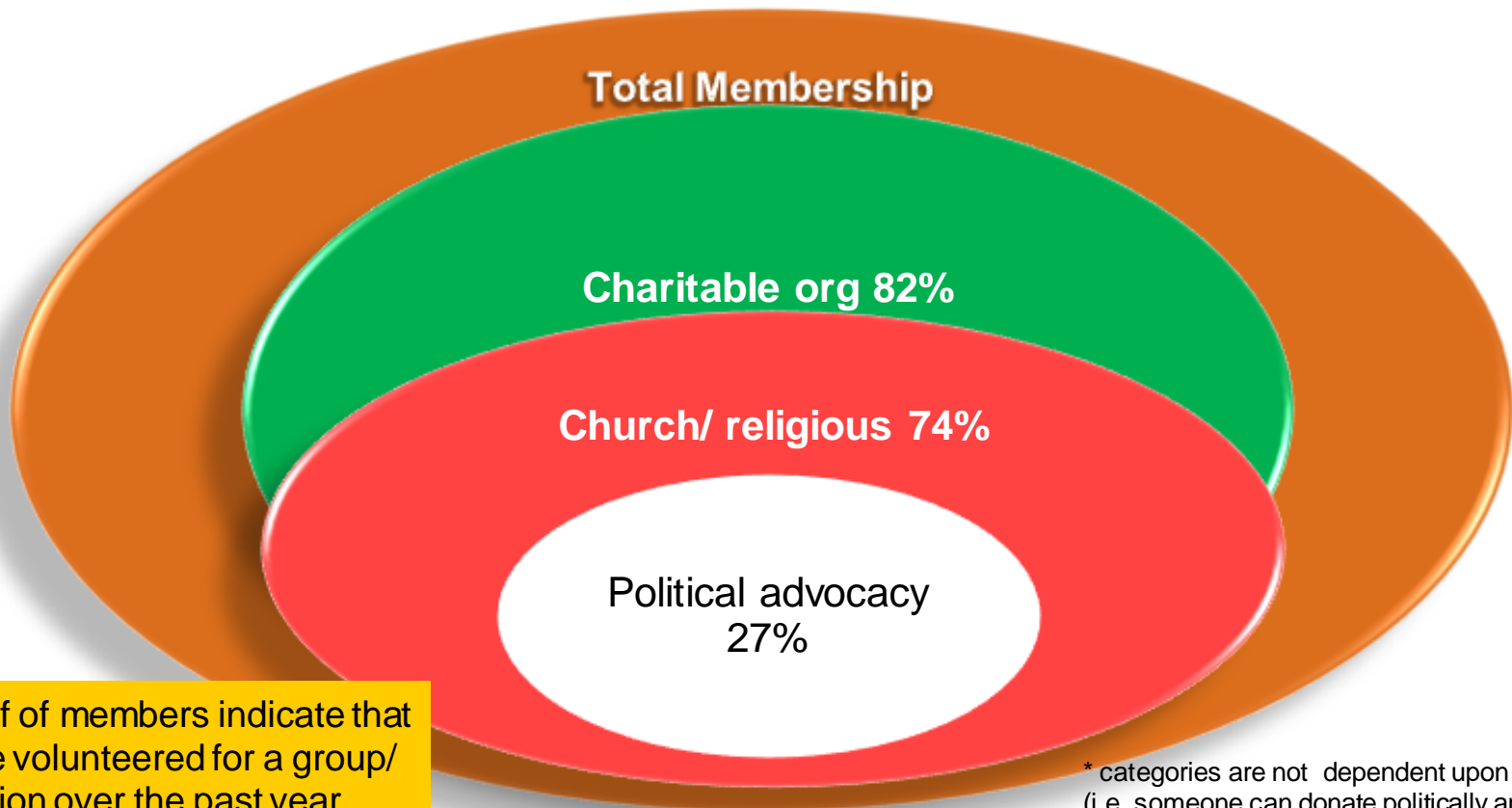
Incidence of Top Life Events for 2016



Health and money problems dominate the majority of all life events that impact members.

- Over 90% of members have experienced at least one life event in past two years
- The only “positive” life events that appear in the top 10 are birth of a grandchild, remodeled home, and retirement
- Additionally, 38% of members say they are currently providing caregiving services for a family member or loved one

Many contribute money to charities but less likely to donate politically

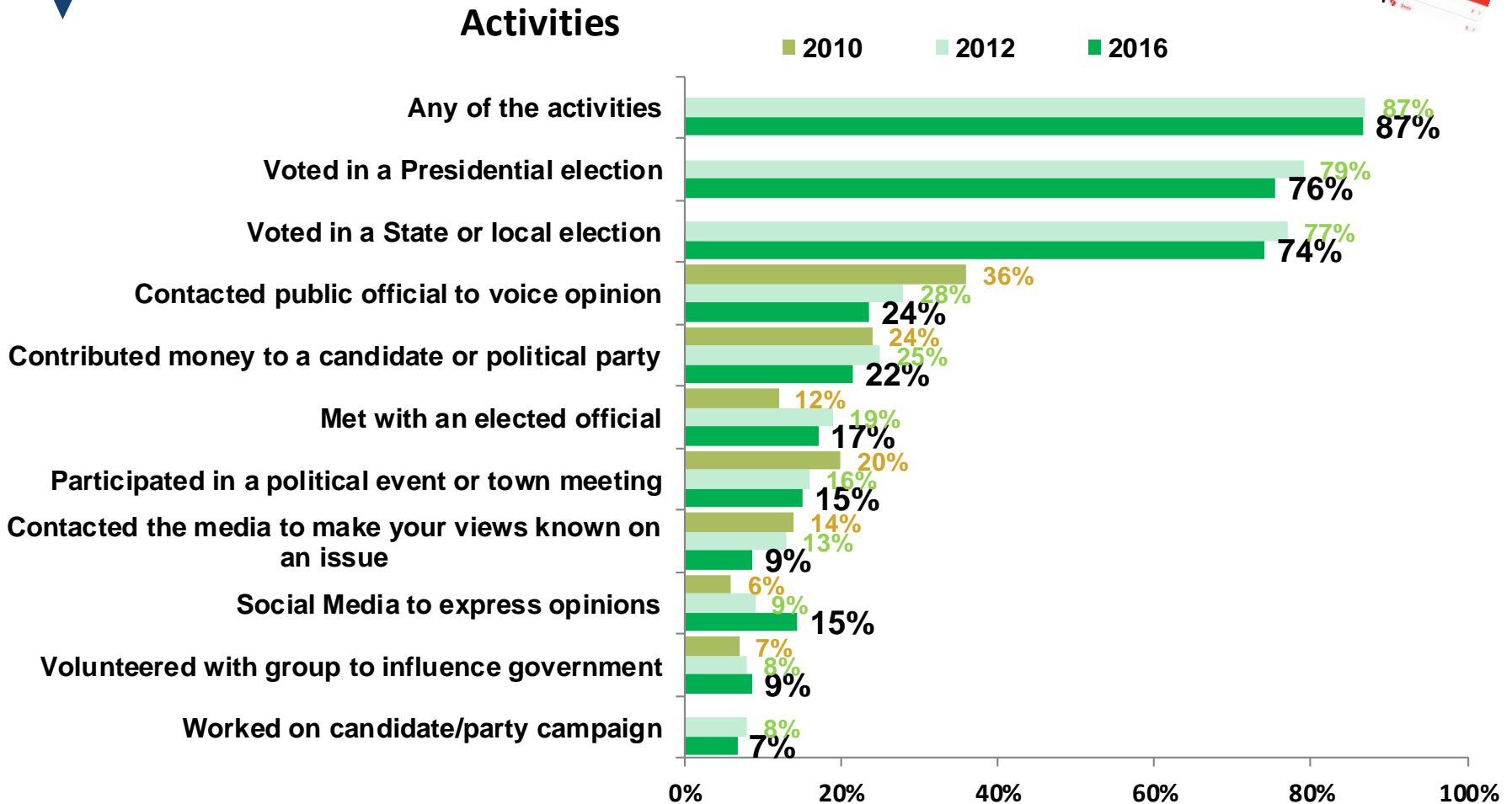


About half of members indicate that they have volunteered for a group/organization over the past year

* categories are not dependent upon one another (i.e. someone can donate politically and not have given to their church)

- 82% of members contribute to a charity while 74% contribute to their church and/or religion – both are on par with 2012 giving
- More than one-fourth contribute to political groups, which has fallen from 32% in 2012

Outside of voting, the most popular politically-charged activity is to contact a public official

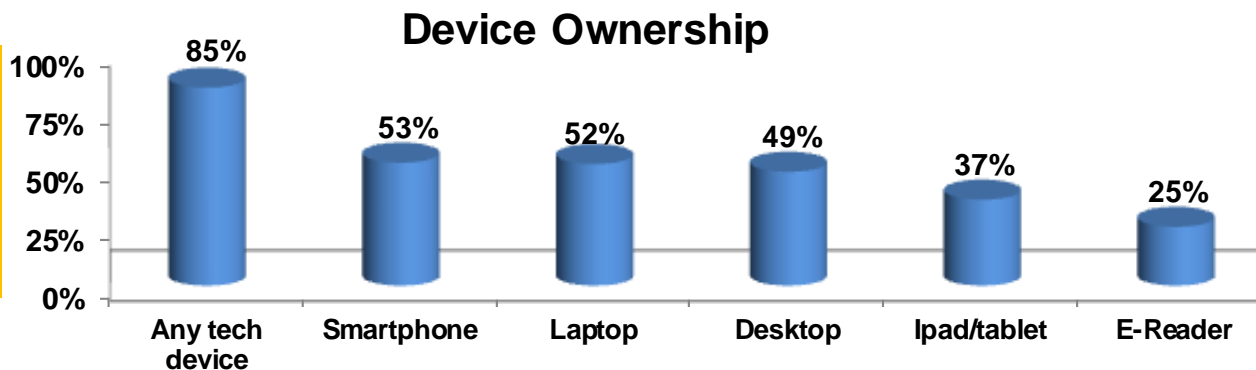


- The majority of activities have seen a drop off over the past several years, including voting
- Using social media to express an opinion has logically shown some growth

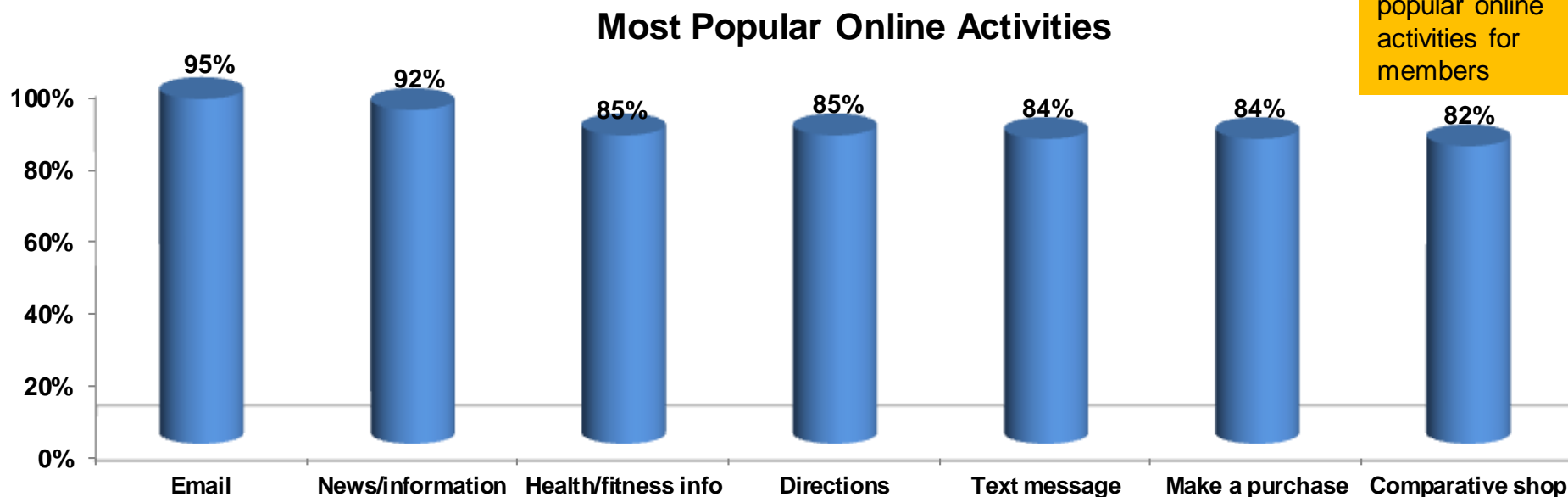
Almost all members (83%) go online and most go online at least daily



Interestingly, smart phones are one of the most popular devices owned by members



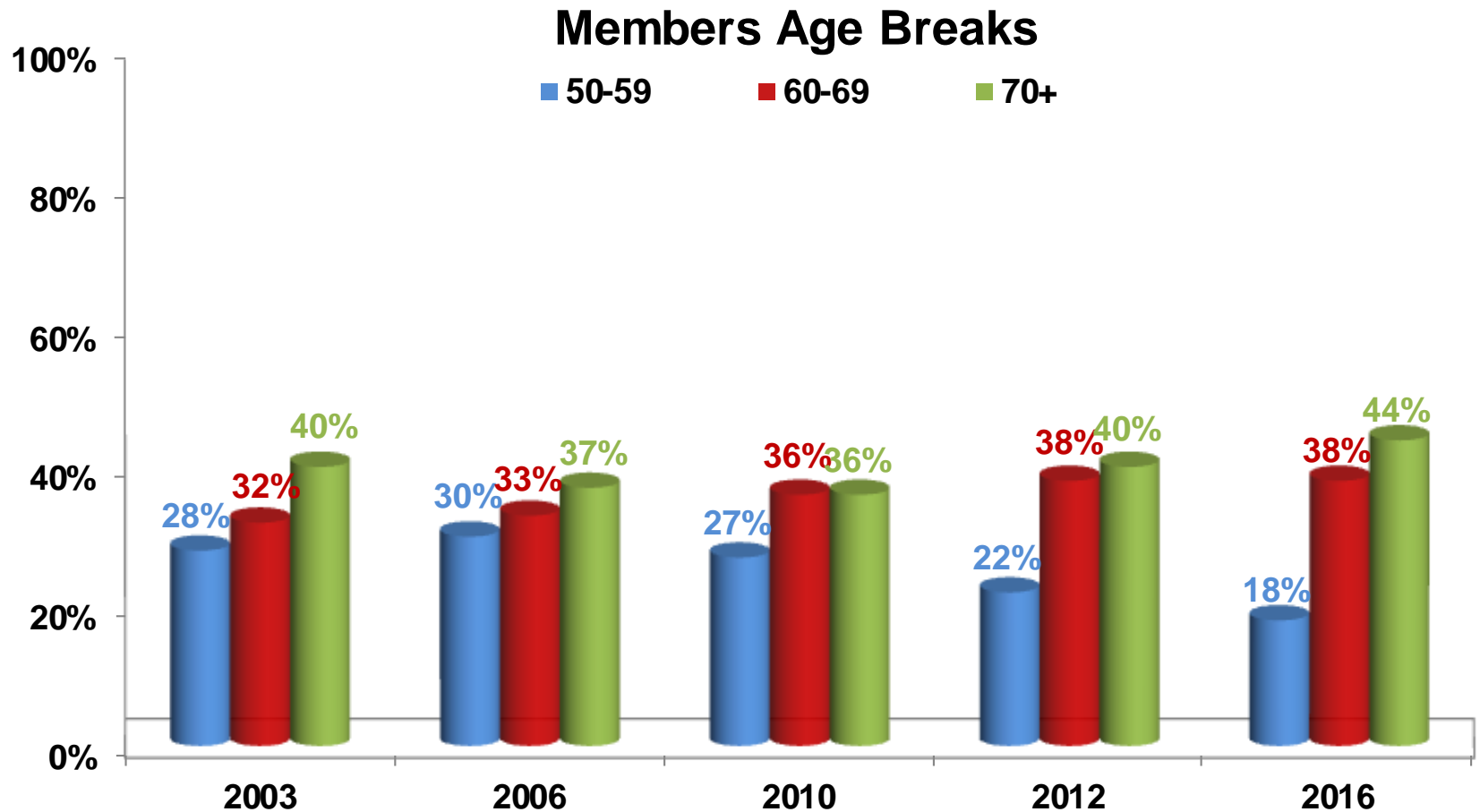
Email and getting news are most popular online activities for members



- 17% of members never go online, which is down from 20% in 2012
- 53% of members own a smart phone, which is up from 31% in 2012

Demographic Highlights

Age of membership has evolved significantly over the past several years

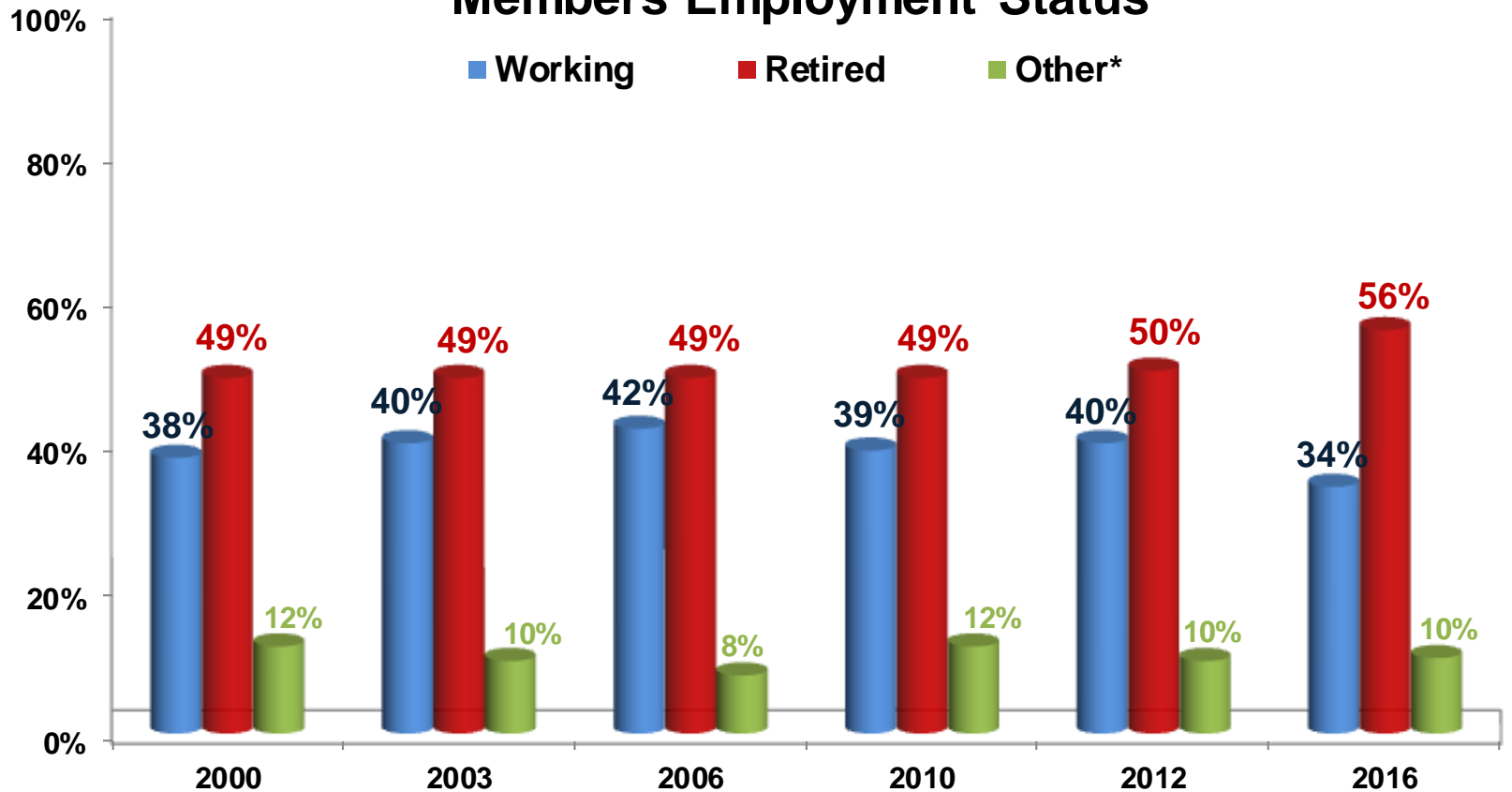


- 60-69 age segment has grown almost 20% since 2003 (70+ year olds by 10%) and at the same time the 50-59 year old segment has fallen 36%

The percentage of members who are retired has increased in 2016



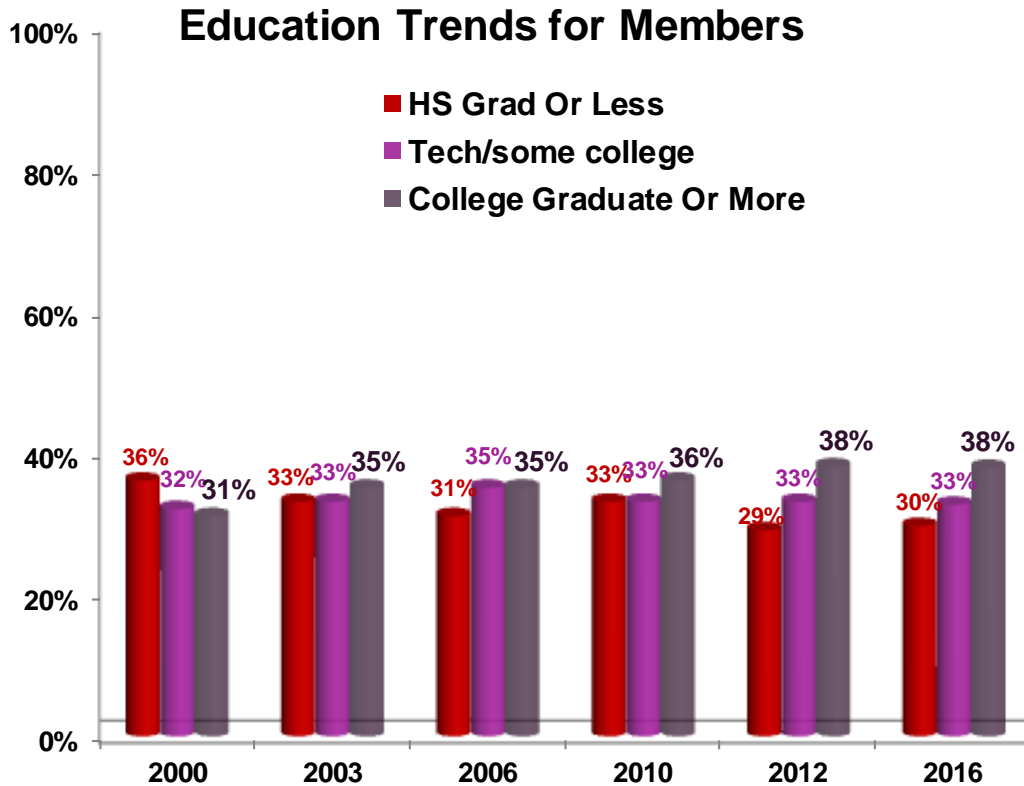
Members Employment Status



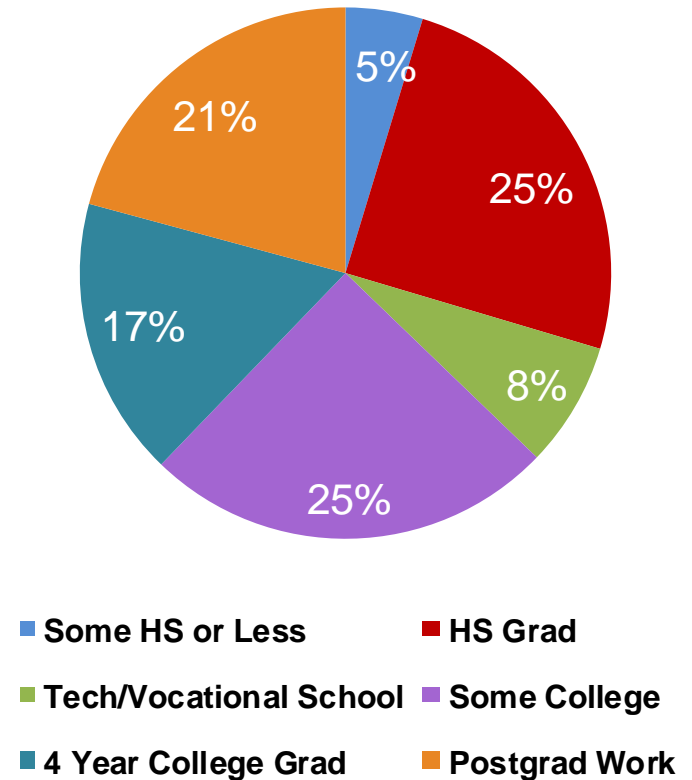
*other includes unemployed, homemakers, and other

- 56% of our members are retired, which has increased more than 10% in 2016
- 34% of our members are currently working in some fashion

The education level of members has increased over the past several years

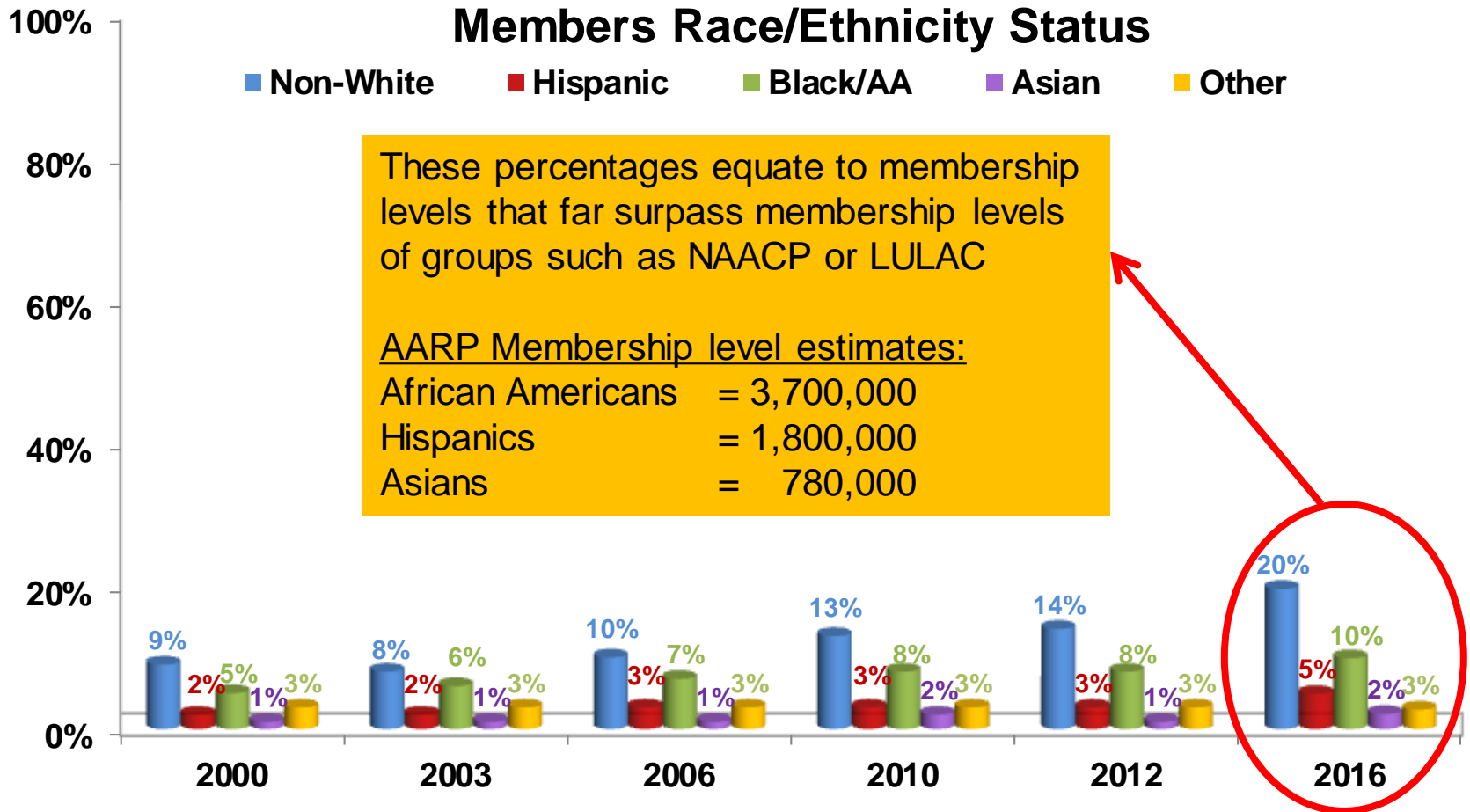


2016 Education Levels



- Only 5% of members have not graduated from HS
- 71% of members have at least some post HS education
- The percentage of members at least graduating from college has increased 23% since 2000

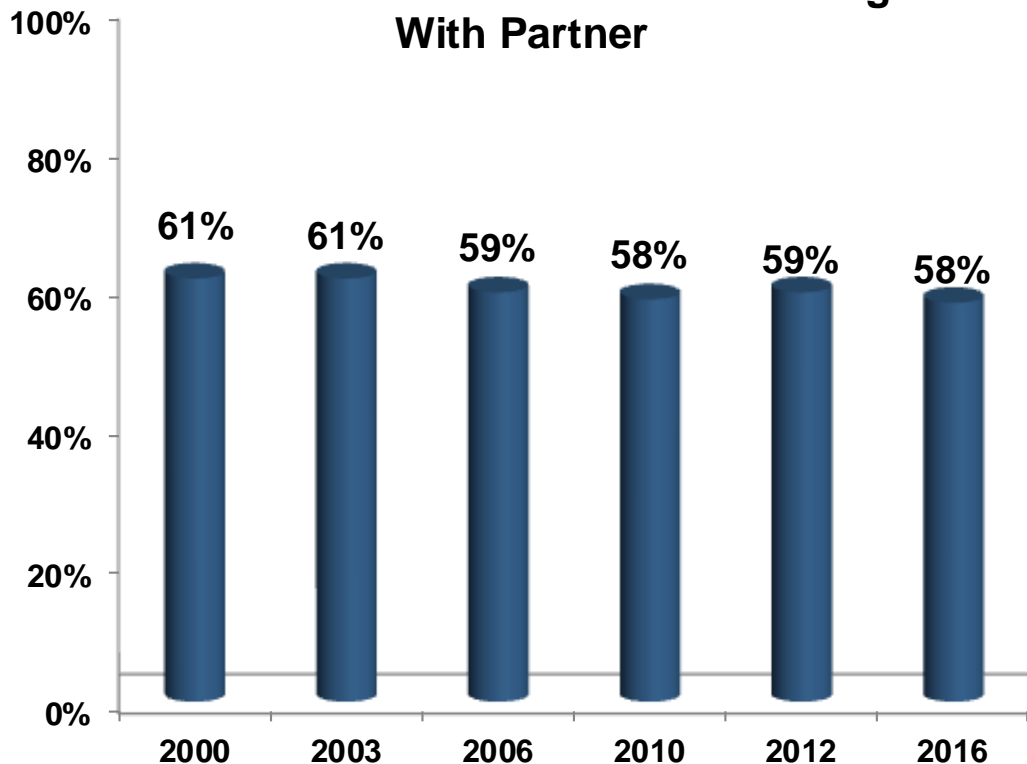
Diverse populations have increased significantly (doubling from 10% to 20% in past 10 years)



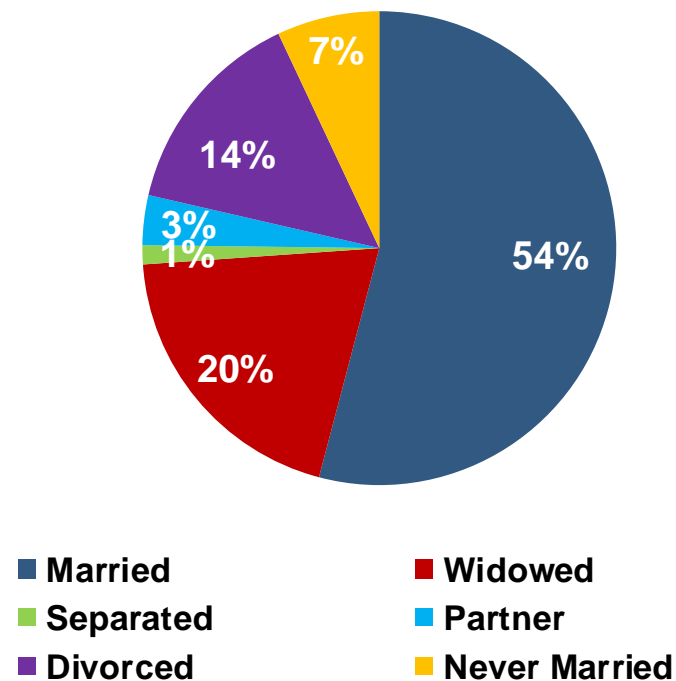
The percentage of members who are married or living with a partner has declined since 2000



Members Who Are Married Or Living With Partner



2016 Marital Status

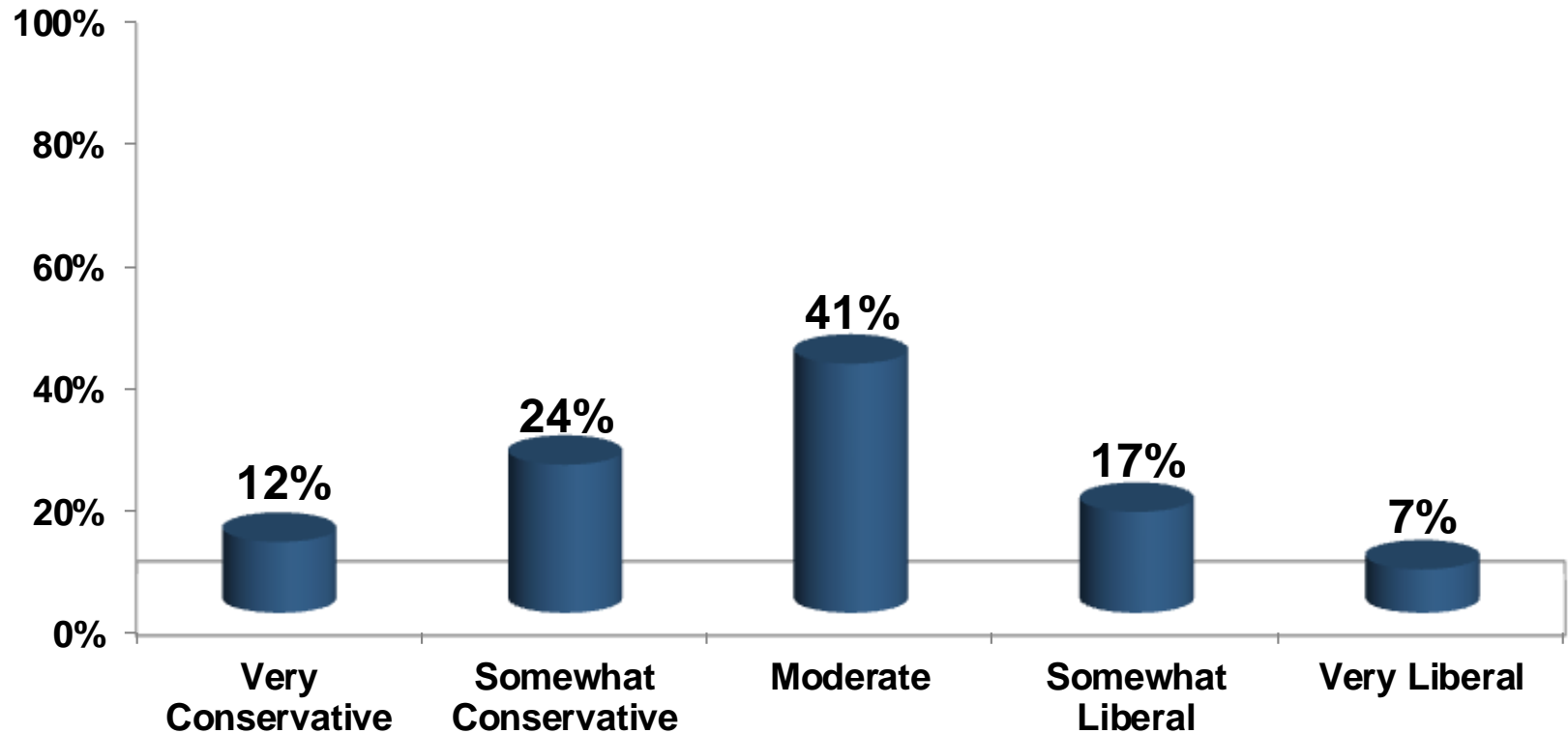


- 54% of members are married in 2016
- 42% of members are single (widowed, divorced, separated, or never married)
- 2.4% of members identified as LGBT

Many members see themselves as moderate followed by conservative



Political Views



- Members are 50% more likely to see themselves as conservative when compared to liberal
- One fifth of members see themselves as liberal

Summary and Insights

Key Insights and Highlights

1. Technology adoption continues to grow significantly and smartphones (53%) have become the most owned technology device among members
2. Minority audiences have grown significantly as a part of AARP membership
 - ❑ Diverse audiences make up 20% of membership (twice as high as the 10% figure ten years ago) – there is still work to do as 25% of the 50+ population currently is multicultural
3. Members' needs/wants have been relatively consistent over time with their concerns focused around health/financial security and their interests on healthy living and enjoying life
4. Challenging life events can consume Members' schedules/priorities – the top life events impacting members in the past two years are:
 - ❑ Caregiving (38%), Reduction in income/savings (32%/29%), Death of family member or friend (31%), Chronic health issues (29%)