



New-to-Medicare Marketing Playbook

Reach the Turning-65 Audience with Confidence

Get the strategies, tools, and ready-to-use resources you need to attract, educate, and enroll New-to-Medicare clients. This free guide is packed with proven outreach tactics, compliant messaging tips, and customizable materials to help you grow your Medicare business.

Medicare is evolving—and so are your clients.

As a new generation turns 65, they're bringing different expectations, digital habits, and decision-making styles to the Medicare conversation.

Gone are the days of one-size-fits-all messaging—today's prospects are more informed, tech-savvy, and **eager for personalized guidance**. To stay competitive, agents need a smarter, more strategic approach to connect with these modern Medicare shoppers.

72%

72% of Medicare shoppers use the internet to research their options before enrolling



Late Boomers (Born 1956–1964)

This generation brings unique challenges and priorities:

- Often less financially prepared for retirement
- May be part of blended families or caring for aging parents
- Facing uncertainty around when—or if—they can retire
- Seeking more flexible, personalized healthcare options



Early Boomers (Born 1946–1955)

This generation entered retirement with different expectations and circumstances:

- Generally more financially secure
- Often traditional empty nesters or grandparents
- Many already retired or well into retirement
- More optimistic about retirement and their healthcare options

Today's seniors are more connected—and more selective—than ever.

They're researching plans online, comparing options across multiple platforms, and expecting a personalized experience that fits their lifestyle. Traditional methods alone no longer cut it.

To reach and engage this modern Medicare audience, your marketing must be digital-friendly, value-driven, and tailored to their specific concerns. Building trust and providing clear, relevant information at the right time is key to turning prospects into loyal clients.



Maintain a strong digital presence with an up-to-date website, educational content, and active social media. Most Medicare-eligible consumers start their research online—be where they're looking.



Provide clear, helpful information that builds trust. Think webinars, FAQ videos, and comparison guides that position you as a knowledgeable, go-to resource—not just another salesperson.



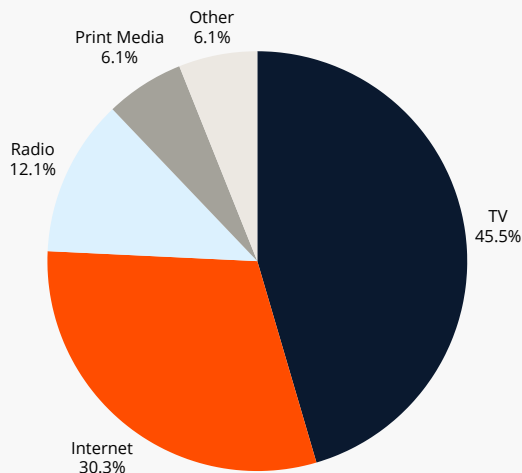
Rethinking the Timeline

According to recent Deft Research Medicare Shopping and Switching studies, **around 50% of consumers turning 65 each year say they plan to continue working and delay full Medicare enrollment**—often choosing to:

- Enroll in Medicare Part A only (since it's usually premium-free)
- Delay Part B and Part D if they have creditable employer coverage

50%

Retirement



Older adults are embracing new ways to access news and entertainment.

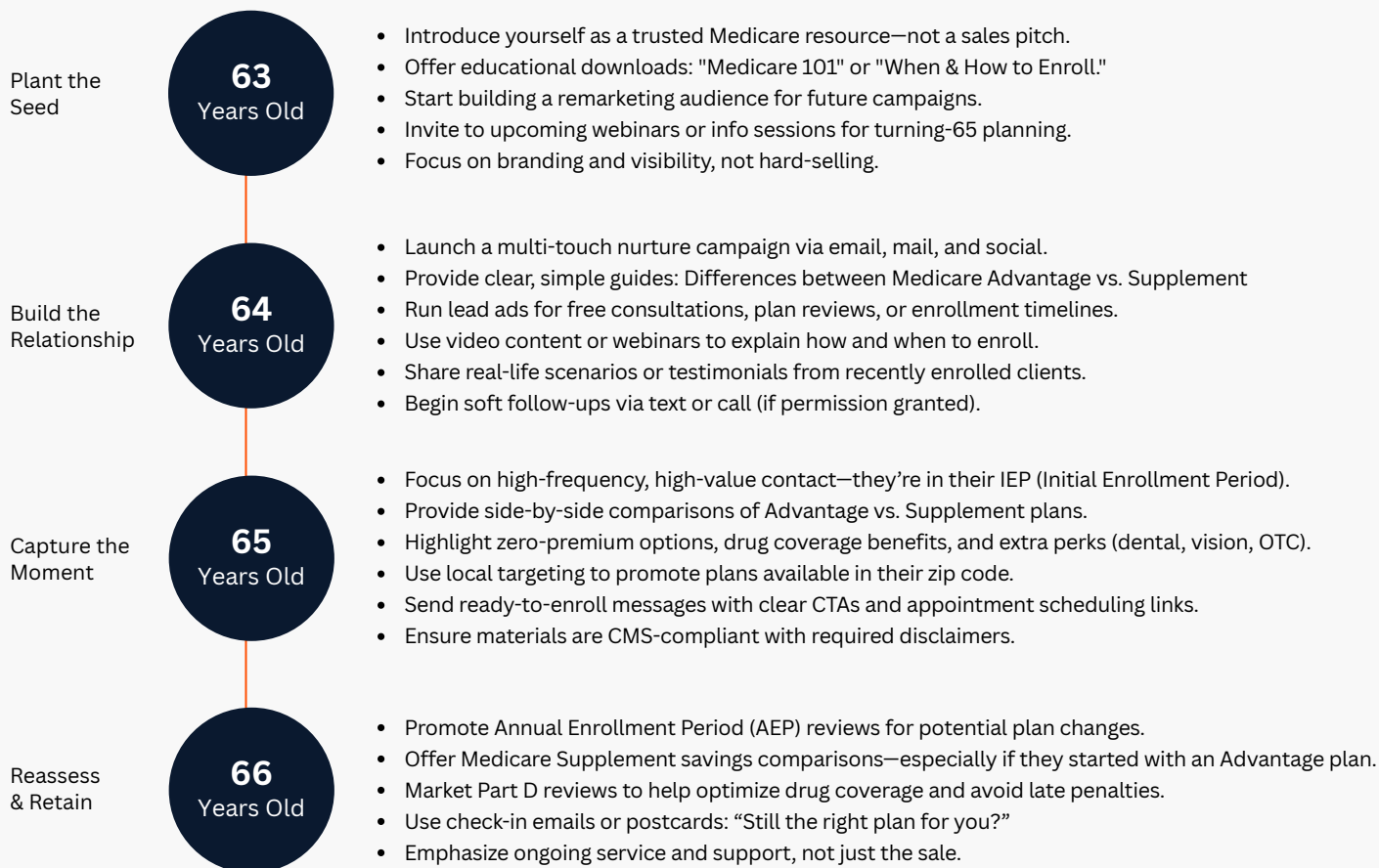
Daily Media Use Among Seniors

Estimated distribution based on typical behavior patterns:

- TV (including streaming): 45%
- Internet browsing: 30%
- Radio: 12%
- Print media (newspapers, magazines): 6%
- Other (games, podcasts, etc.): 6%

How to Increase Your Reach in the Turning-65 Segment

Broaden your sales strategy to reflect today's Medicare landscape. A modern New-to-Medicare program should engage both the Turning-65 audience and those delaying retirement.



Rethink Your New-to-Medicare (NTM) Marketing Strategy

To effectively engage today's New-to-Medicare audience, it's time to take a fresh approach:

- Lead with transparency
- Connect Medicare to broader retirement planning
- Be culturally aware
- Address growing health concerns
- Prioritize full digital experiences
- Emphasize savings and value

”Today's Medicare audience expects guidance, not a sales pitch. To earn their trust, lead with transparency, relevance, and a seamless digital experience."





Expand Your Marketing Reach to Boost Awareness and Engagement

Look beyond traditional tactics to connect with New-to-Medicare prospects in meaningful ways:

- Host virtual educational events to build trust and answer common Medicare questions.
- Run paid search and social campaigns year-round to stay visible and top of mind.
- Create internal training and incentive programs to turn your team into knowledgeable brand advocates.
- Grow your library of educational content with clear, accessible resources tailored to different stages of the Medicare journey.
- Develop a comprehensive content strategy that speaks to all aspects of retirement planning, not just Medicare.

Go Beyond the Basics

Here are creative ways agents can connect with New-to-Medicare prospects:

➤ Launch a “Countdown to 65” Email Series

Create an automated drip campaign that delivers helpful, bite-sized Medicare tips starting at age 64 and leading up to enrollment.

➤ Create a “Medicare & Me” Planning Workbook

A printable or digital guide that walks consumers through budgeting, plan options, and common enrollment timelines—while positioning you as the go-to resource.

Turn Strategy Into Action

The Medicare market is evolving—and so should your strategy. By focusing on transparency, personalization, and digital engagement, you’ll be better equipped to connect with today’s New-to-Medicare audience.

Use the insights and ideas in this playbook to refine your outreach, build stronger relationships, and grow your book of business with confidence. The opportunity is there—now it’s time to act.

Ready to Market Like a Pro?

Tap into the PSM Marketing Hub and start attracting more clients today.

Get custom-branded materials—all at no cost to agents partnered with PSM.



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