



Recent Quantitative Annuity Examples

METHODOLOGY	Online quantitative survey using panel sample and/or Discovery database lists with 300-600 Advisors	Online quantitative survey using Discovery database lists with 600 Advisors	Online quantitative survey using Discovery database lists with 500 Advisors and non-registered reps	Online quantitative survey using Discovery database lists with 300 Advisors and non-registered reps	Online quantitative survey using panel sample and Discovery database lists with 600 Advisors and non-registered reps
	CONCEPT STUDIES (8)	VA OPTIMIZATION	FIA OPTIMIZATION	ANNUITY MESSAGING/ POSITIONING	ADVISOR HABITS STUDY
OBJECTIVES	Across a number of different studies, we tested various benefits, riders, and/or services among Advisors; some were monadic designs and others a choice-based exercise	Complex conjoint design to optimize the ideal VA product and compare to competitive benchmarks; output included a simulator to test various product combinations	Complex conjoint design to optimize the ideal FIA product; output included a simulator to test various product combinations	Assess a company's brand positioning in the annuity market and determine the best tools and service offerings to associate with the positioning	Explore current advisor habits related to information sources, media, social networking, and technology usage



Recent Qualitative Annuity Examples

METHODOLOGY	Online bulletin boards with Advisors and Non-registered reps	Webcam focus groups and telephone in-depth interviews with Advisors and Consumers	Webcam focus groups and telephone in-depth interviews with Consumers	Webcam focus groups with Advisors	Webcam in-depth interviews with fee-based Advisors in across a mix of channels
	ANNUITY HOT TOPICS (ANNUAL)	ANNUITY COLLATERAL/ CONCEPT TEST	ANNUITY MARKET ASSESSMENT	INVESTMENT-ONLY ANNUITY CONCEPT TEST	FEE-BASED ANNUITY EXPLORATION
OBJECTIVES	Explore trends and “hot” issues in the annuity market, including marketing/ messaging, target market, FIAs, VAs, IOVAs, and more	Assess reaction to a specific VA product and test a number of collateral materials, including a video and a brochure	Explore consumer understanding and perceptions of annuity and measure interest in potential annuity ideas	Assess reaction to an investment-only VA product and test a number of collateral materials	Explore advisor perceptions and usage of fee-based annuities and identify priorities and features of the ideal fee-based annuity