

December 2015

Marketing Financial Services to the Mass Affluent - US

"The mass affluent market is largely untapped by traditional financial services providers and provides great opportunity for institutions to expand their customer base. Less than one third of mass affluent consumers regularly work with a financial advisor, yet their financial needs are substantial and diverse. New strategies and technologies can ...

November 2015

The Insurance Purchase Decision - US

"The insurance purchase decision has significant long-term impact on consumers' wallets and insurers' success. Most consumers are loyal to the insurer they pick and do not switch often, indicating that insurers need to achieve new opportunities where they can be found. Marketers who understand the factors that influence consumer attitudes ...

Baby Boomers and Finance - US

Financial services institutions may be focusing a lot of attention on Millennials, but Boomers are still a very influential group. According to the US Bureau of Labor Statistics' Consumer Expenditure Survey, Boomers earn an estimated \$2.4 trillion each year. This report examines how the Boomers feel about retirement: how ...

October 2015

Financial Services and Small Businesses - US

"The small business segment is changing rapidly, as an increasing percentage of small businesses are owned by women and minorities."