



EXECUTIVE INSIGHT:

Driving Digital Engagement Pays Dividends

Agents and Advisors are neglecting a critical aspect of annuity client engagement: promoting digital options and capabilities.

DIGITAL IS
A KEY PART
OF ANY
RELATIONSHIP

 **74%**
of Annuity customers have used the Website, App or both to engage with their annuity provider

 **59%**
of Millennials have used a mobile device to interact with their annuity provider

Advisor/Agent referrals are
2X HIGHER
when customers are
empowered

**“DEFINITELY WILL”
RECOMMEND AGENT/ADVISOR**

*Annuity provider allows me to manage
my account when and how I need*

**STRONGLY
AGREE**

71%

**DO NOT
STRONGLY AGREE**

34%

DO YOUR DIGITAL CAPABILITIES STACK UP?

Annuity providers receiving high marks for their website’s range of services and ease of navigation are much more likely to be seen as empowering their customers.

- Are you a leader or a laggard when it comes to providing consumers the online tools and access they want?
- Do gaps you have to competitors require technical changes or is the issue more about communications and design?