

# Medicare Marketing & Distribution Research

This study is a new opportunity to develop a comprehensive, in-depth understanding of the marketing and sales support needs of Medicare Advantage and Medicare Supplement agents and agencies, conducted by Greenwald Research in partnership with the American Association for Medicare Supplement Insurance (AAMSI). It seeks to uncover who agents are, their concerns, and their preferences from agency and insurance partners.

Research will also be conducted with a variety of Medicare distribution partners and consumers. The consumer survey stresses the intersection between consumers and agents, their similarities and differences. Together this will provide a 360° view of the Medicare market, brand strengths and weaknesses, and drivers of agent loyalty and satisfaction.

## Potential Topics for Each of Three Survey Audiences:

**Agents:** Segment or profile agents by

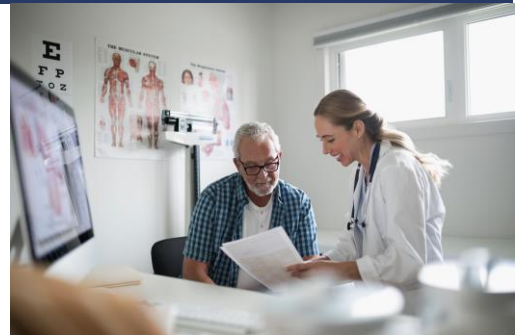
- Sales processes
- Unpacking the “moment of sale”
- Decision-making on what to sell, to whom
- Brand or product preferences
- Onboarding, marketing, sales, and service support needs
- How they rate insurance companies and distributors
- Best targets for sales growth: Newer agents vs. seasoned pros

**Distributors:** Identify and understand

- How agents are recruited, trained, and tracked
- Organizational brand or product preferences
- Onboarding, marketing, sales, and service support needs
- Perspective on what keeps an agent ‘loyal’ to an agency

**Bonus! Consumers:** Compare responses to agents/agencies regarding

- Purchase drivers for healthcare and financial products overall
- “Moment of sale” considerations
- Brand recognition and preferences
- Purchase, marketing, other support needs
- Key differences between current/near-term retirees and next wave of retirees



## Partner With Us—Become a Sponsor!

- Obtain full survey results—available only to sponsors!
- Provide input into the study and get key questions answered
- Use findings in marketing, and public relations efforts
- Benefit from being featured in survey reports, webinars, articles and events
- May also conduct proprietary oversamples for key demographics of interest
- Engage with survey authors at AAMSI 2021 Annual Meeting to delve into survey findings in a breakout session

For additional information or a more detailed description of the program, contact **Edna Vasquez-Dretzka** at 954.995.3862 or [EdnaDretzka@greenwaldresearch.com](mailto:EdnaDretzka@greenwaldresearch.com).