

2025 DISTRIBUTION AND MARKETING CONFERENCE

Shaping Our Future

**Deep Dive - Uniting
Forces: Distribution and
Marketing for Growth**





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Recap: Four key messages from this morning



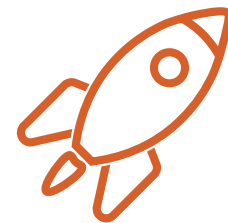
The life insurance industry has a growth challenge, even as demand for its core products is strong



The heart of the issue is around access and (perceived) affordability, leading to a failure to convert interest and awareness to action



Marketing can help close this gap, but needs greater investment and improved coordination with Distribution



Done right, the payoff can be significant!



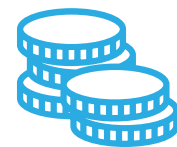
Consumer POV on barriers



Accessibility of the product category – understanding my options / what I need



Accessibility of Financial Professionals –finding and engaging someone I trust



Perceived affordability of life insurance (and engaging with a financial professional)



Engaging on my terms – providing choice as to when and how I engage

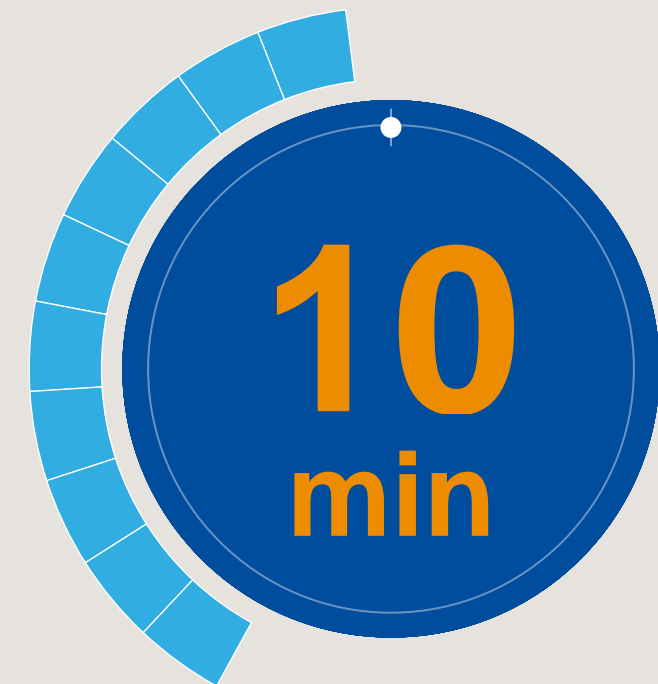


Other?

Breakout discussion:

Where have you seen success in **engaging and educating consumers?**

How can marketing and distribution **work together to overcome the commonly cited barriers?**



Driving Financial Professional (FP) enablement and loyalty

Carrier POV on barriers



Trade-off between **breadth vs. depth of focus** across FPs



Insufficient **conviction in the ROI** to commit investment dollars



Specific to independent distribution:

Ability to **reach FP** directly /
lack of insight on share of book

Ability to **navigate intermediary** relationship

Reluctance about lead sharing,
can't guarantee capture



Other?

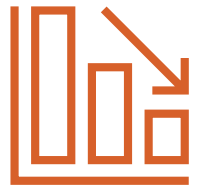
Breakout discussion:

Where have you seen success in **driving FP enablement and loyalty**?

How can marketing and distribution **work together to overcome the commonly cited barriers**?



Reminder: Four key messages



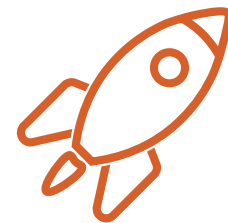
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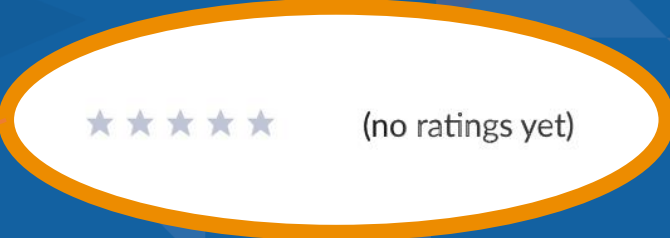
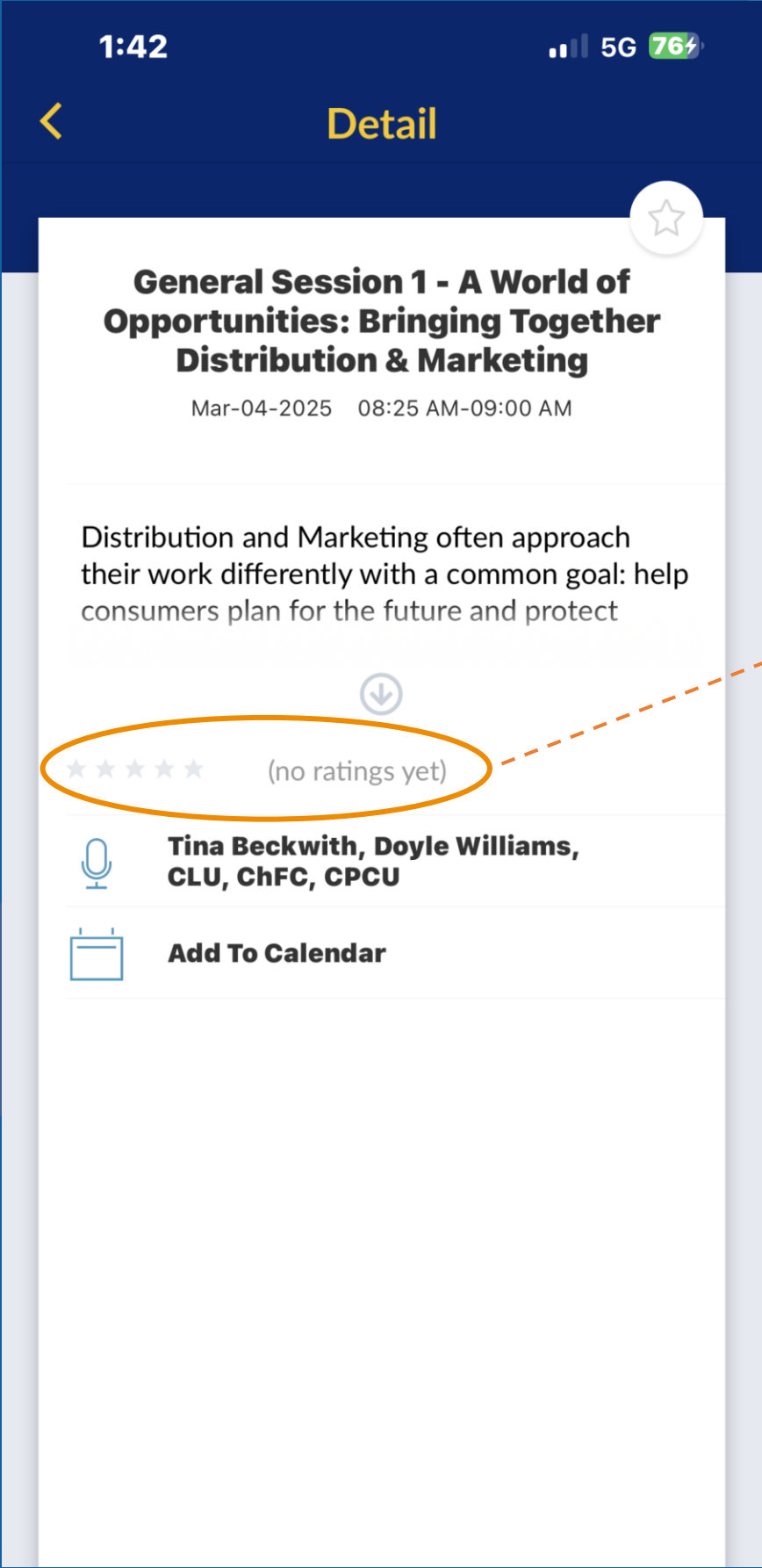
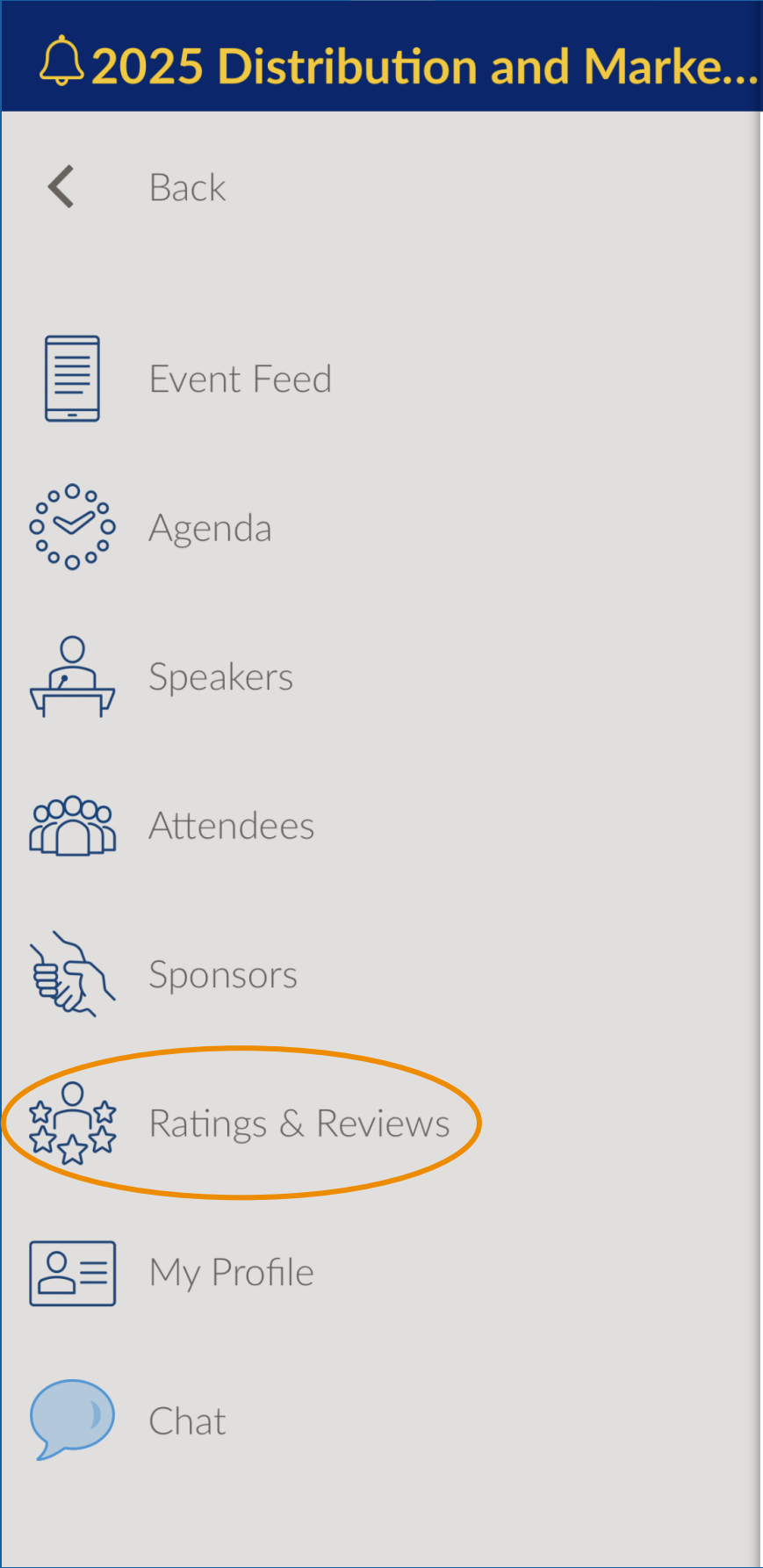
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Please Provide Your Feedback on the Conference App



Thank You



Navigate With Confidence

