

2025 LIMRA Annual Conference

ELEVATING *tomorrow*

Educate, Engage, Elevate: Maximizing the Power of Workplace Benefits



Kimberly Landry

*Associate Research Director,
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LIMRA



Brandan Bruce

President

Help Me Choose Benefits



Deepinder Gulati

Chief Product Officer

Nayya



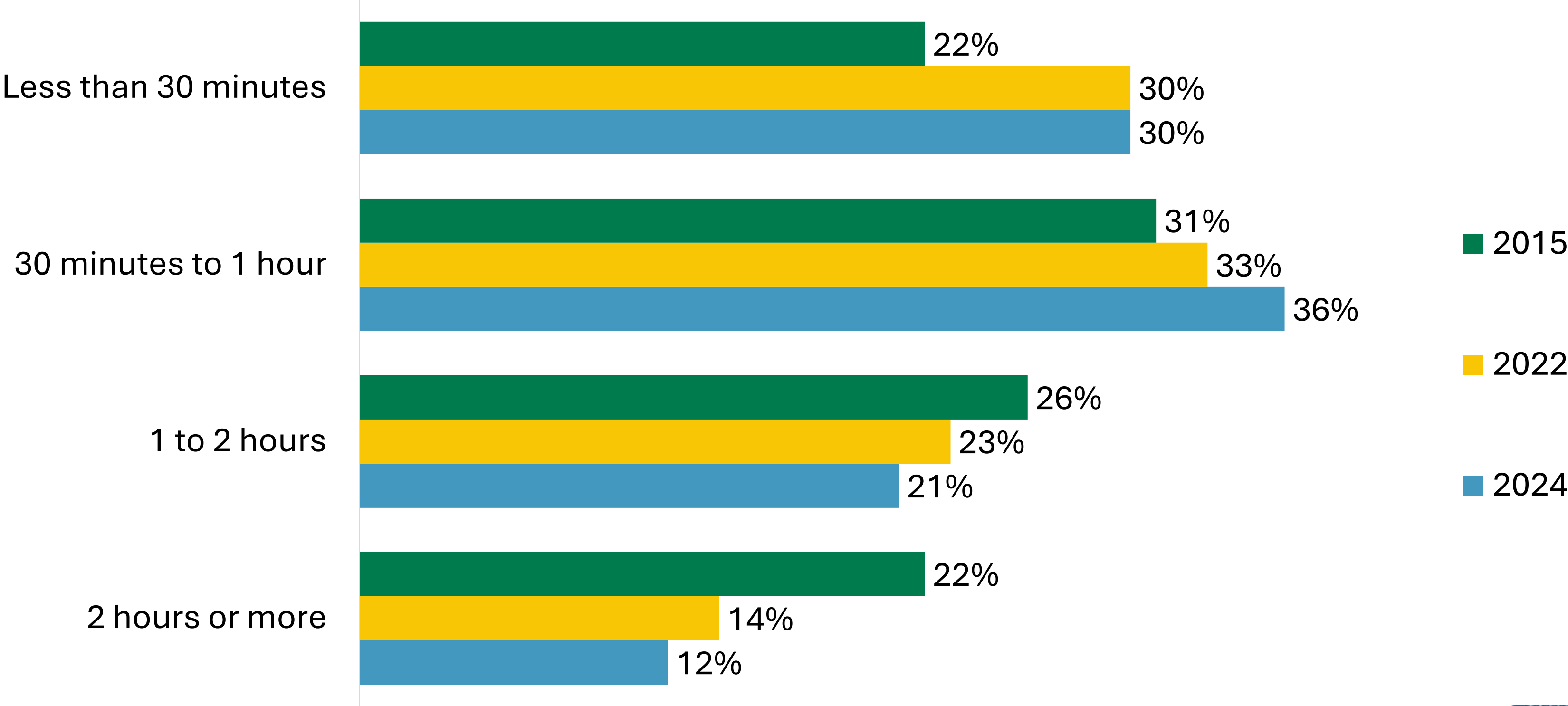
Karen Kimbro

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Transamerica

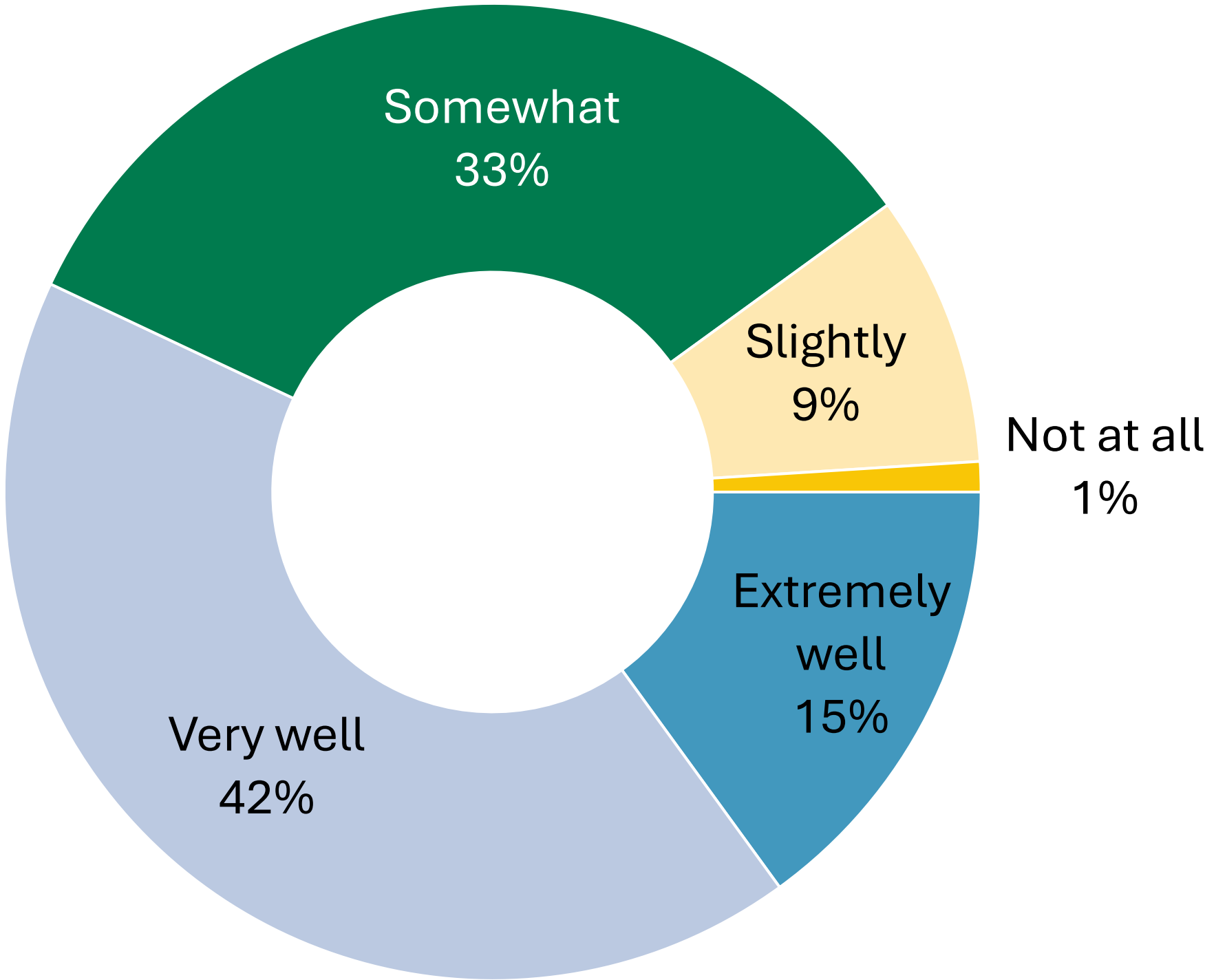
Highlights From the LIMRA BEAT Study

Time Spent Making Benefit Decisions

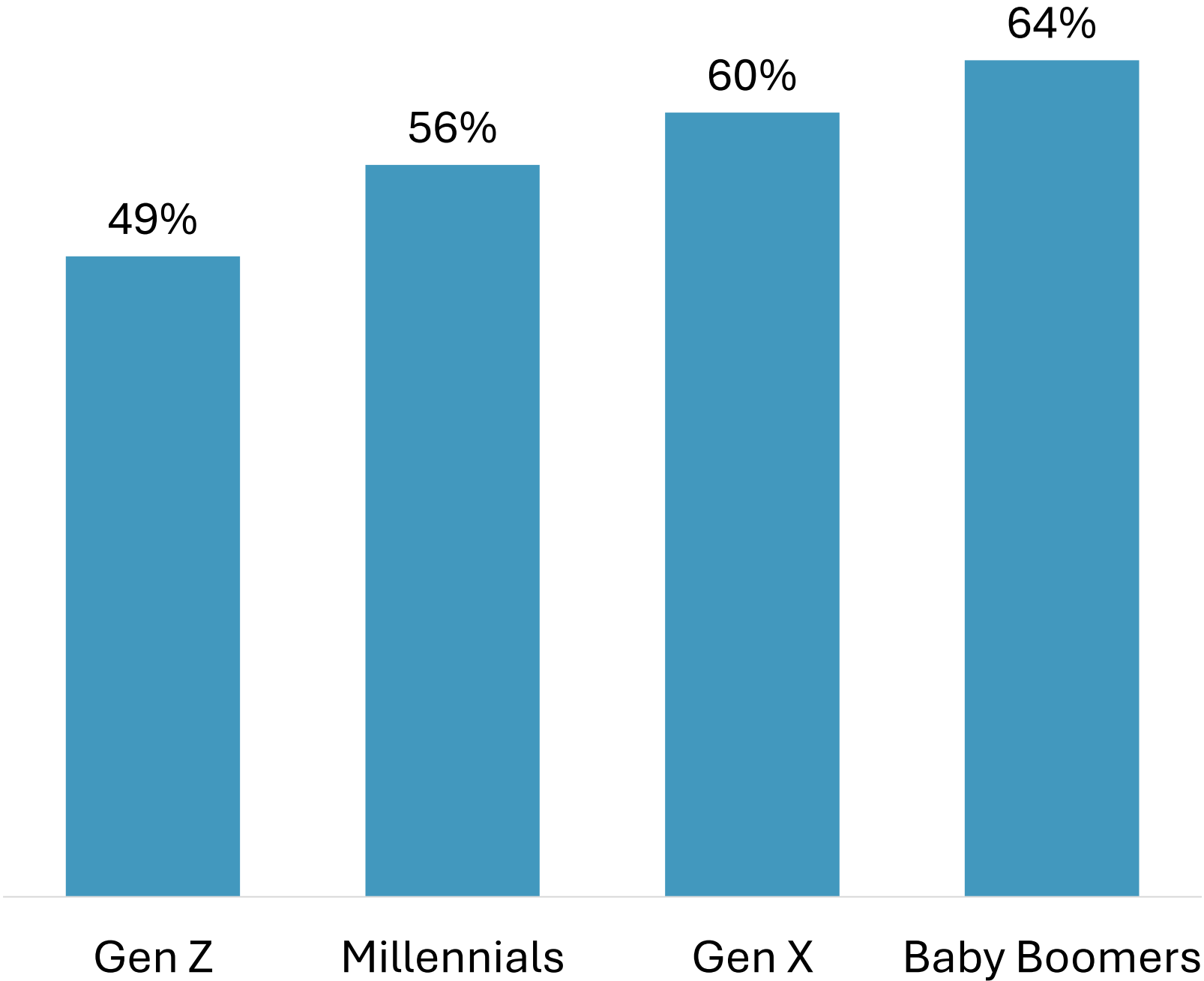


Based on employees who are enrolled in insurance benefits and have had an open enrollment within the past two years. Excludes respondents who are not sure how much time they spent.
Source: 2024 BEAT Study, LIMRA.

Understanding Of Insurance Benefits



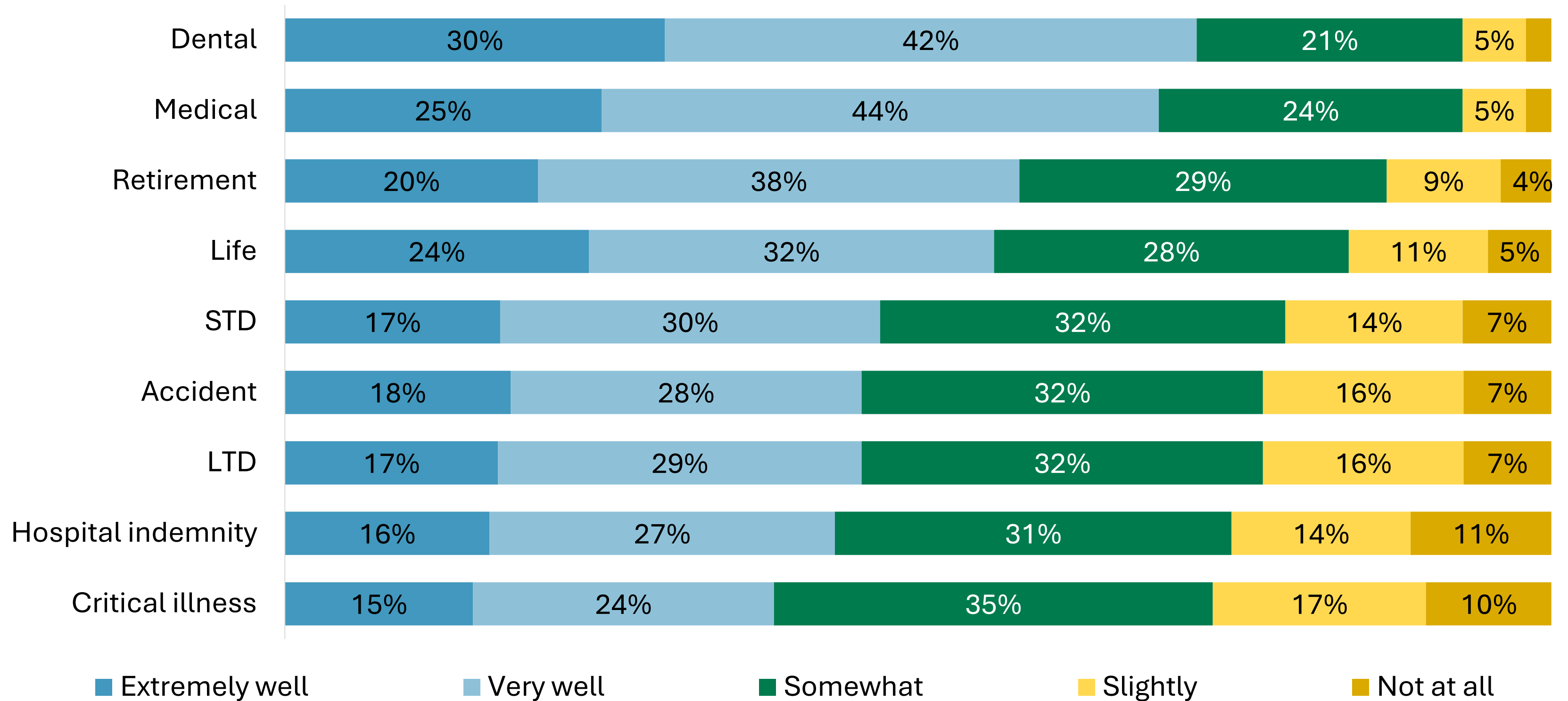
% Who Understand Very/Extremely Well



Based on employees offered insurance benefits.
Source: 2025 BEAT Study, LIMRA.

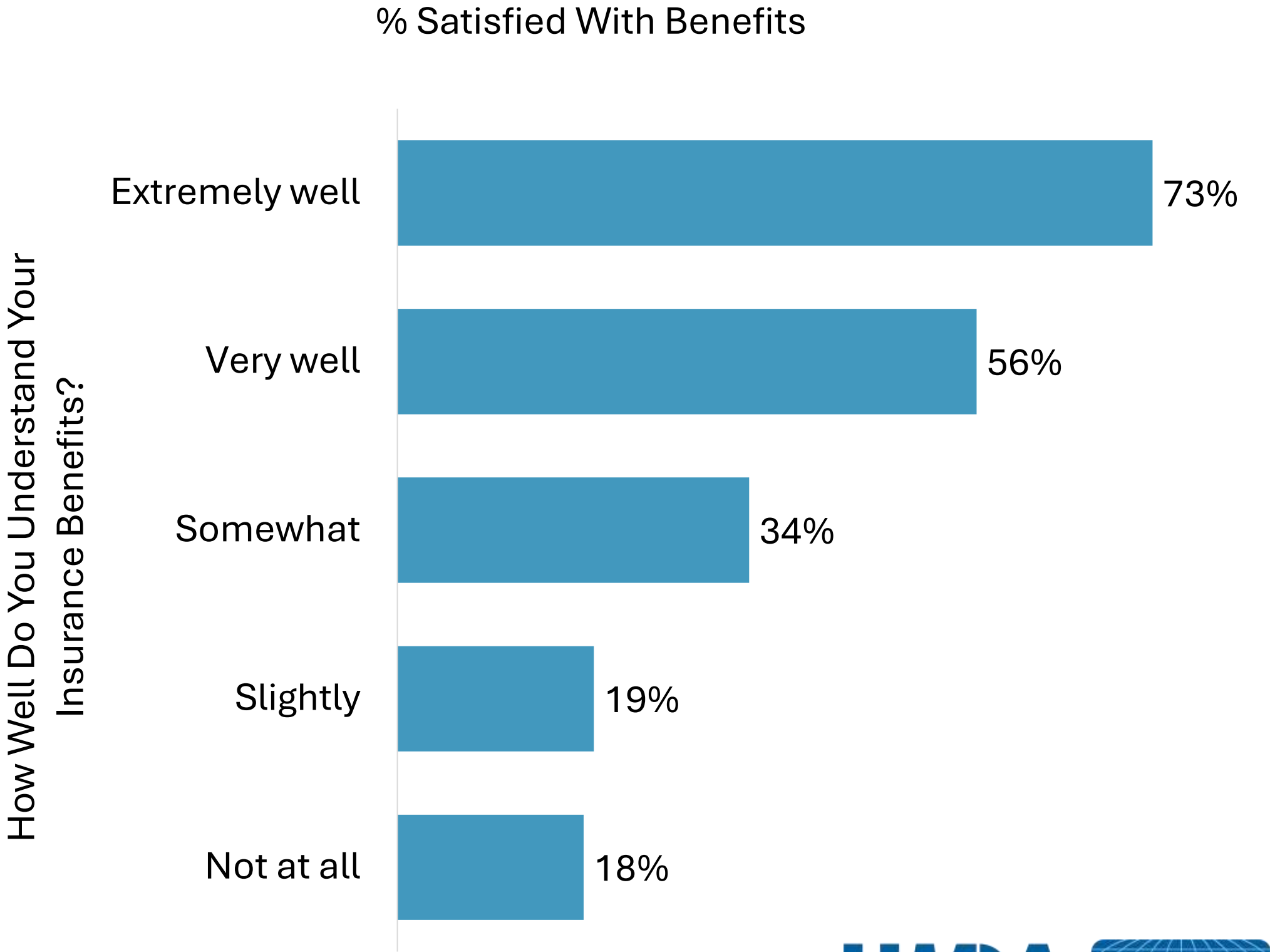


Understanding by Product



Why Does This Matter?

- Enrollment Results
- ROI
- Wallet Share
- Customer Experience
- Satisfaction



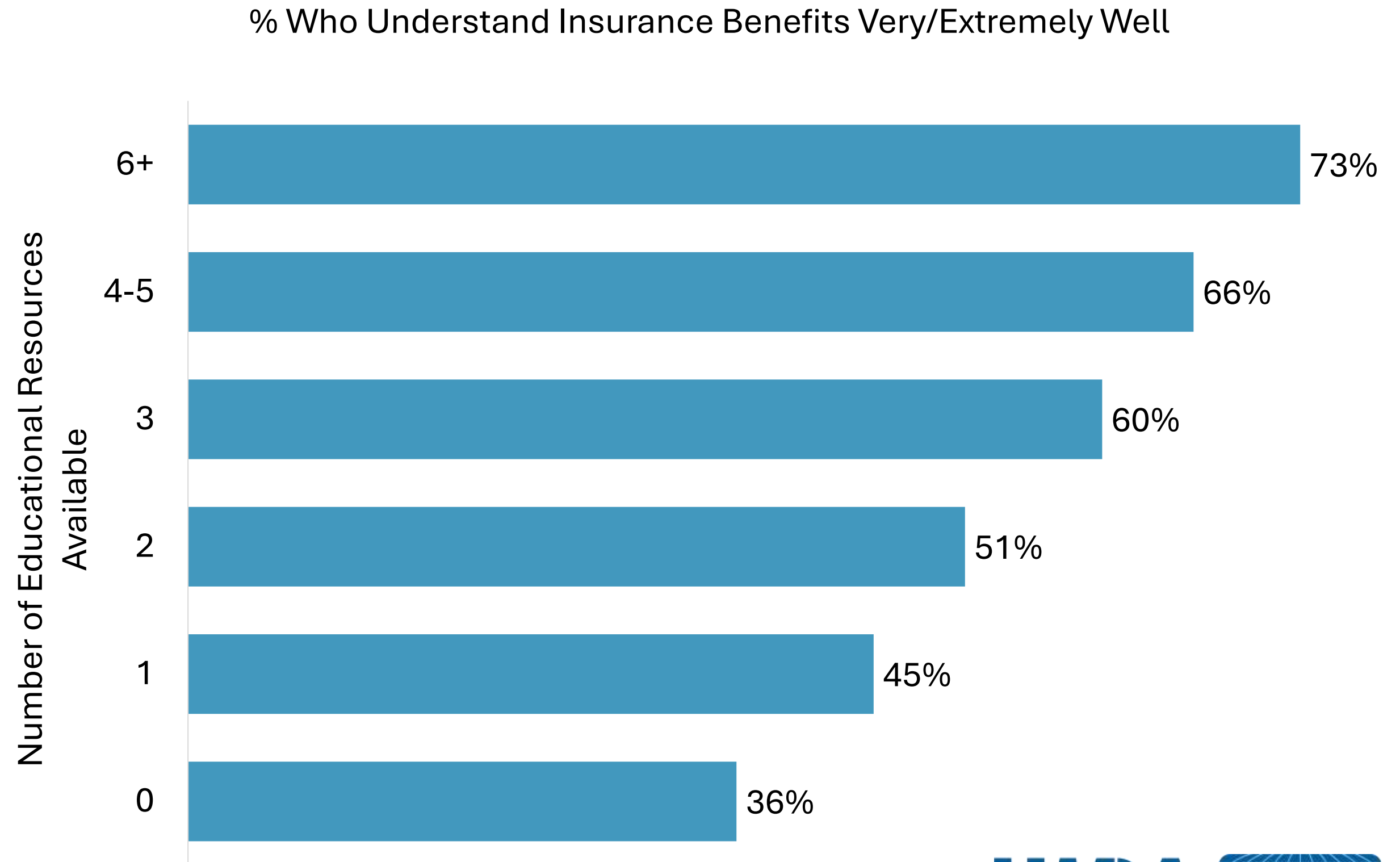
Represents the percent of employees who report high satisfaction with their overall benefits packages (satisfaction rated 8-10 on a 0-10 scale). Based on employees offered insurance benefits.
Source: 2025 BEAT Study, LIMRA.

Most Common Resources for Benefits Education






53%	• Emails
44%	• Online (internet or benefits portal)
29%	• Printed information at work
28%	• Speak with someone by phone
26%	• Printed information mailed home
21%	• In-person group meeting
19%	• Webinar
19%	• In-person 1-on-1 meeting
17%	• Virtual group meeting
17%	• Videos



Importance of Multi-Channel Communication



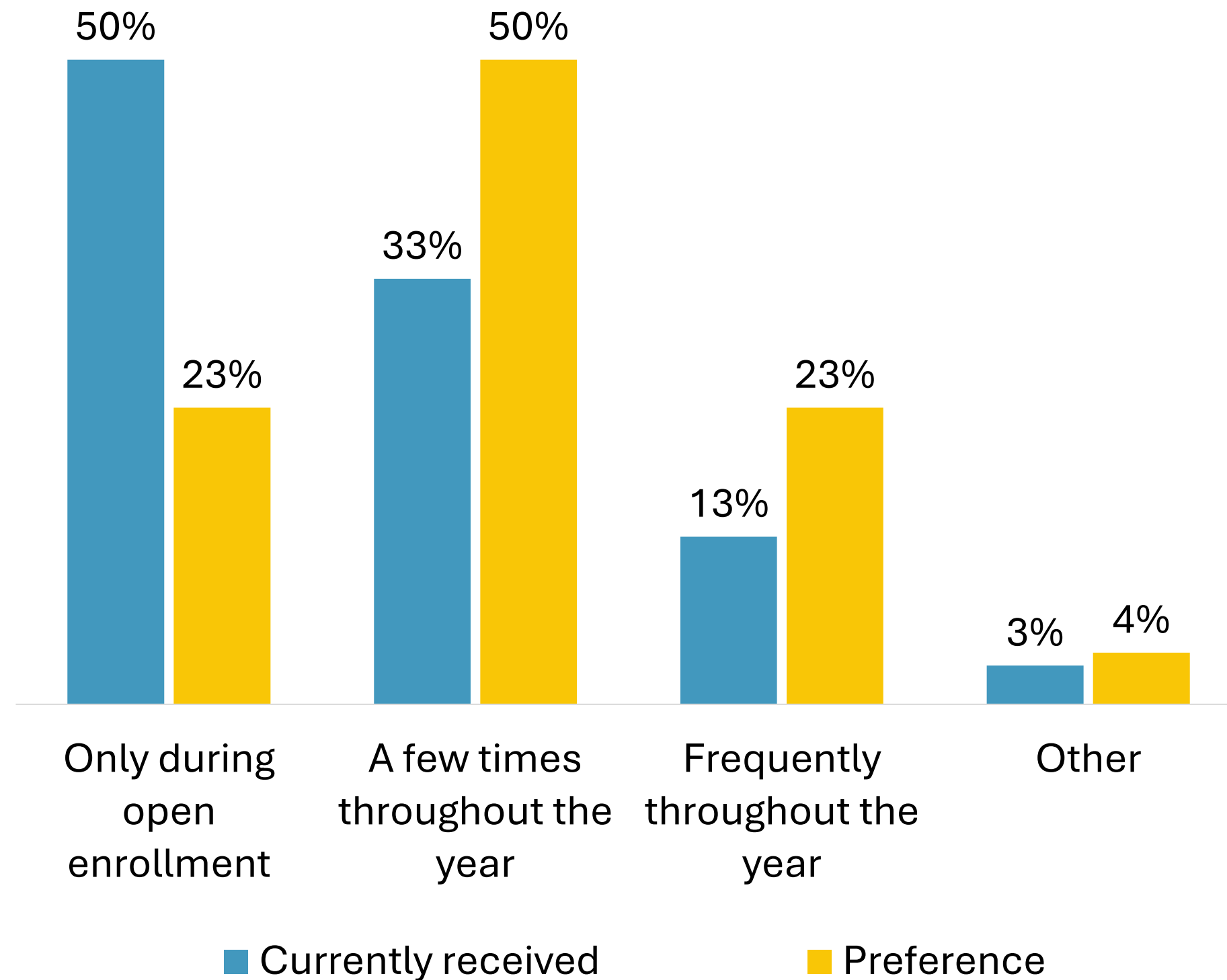
Most Helpful Resources

	In-person 1-on-1 meeting	81%
	Online (internet or benefits portal)	77%
	In-person group meeting	67%
	Interactive recommendation tool	65%
	Speak with someone by phone	63%



Represents the percent of employees who say the specified resource was one of the most helpful they used. Based on employees who are offered insurance benefits and say they used the specified resource to learn about their benefits during open enrollment. Up to two responses allowed.
Source: 2025 BEAT Study, LIMRA.

Frequency of Communication





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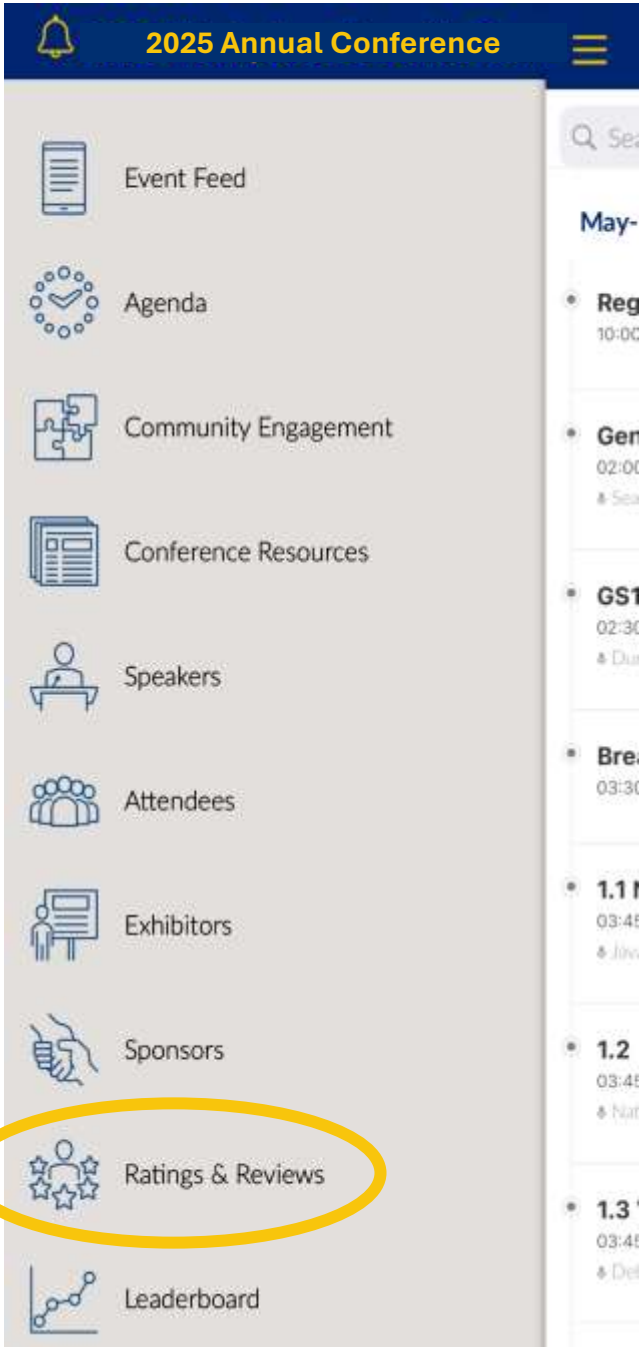
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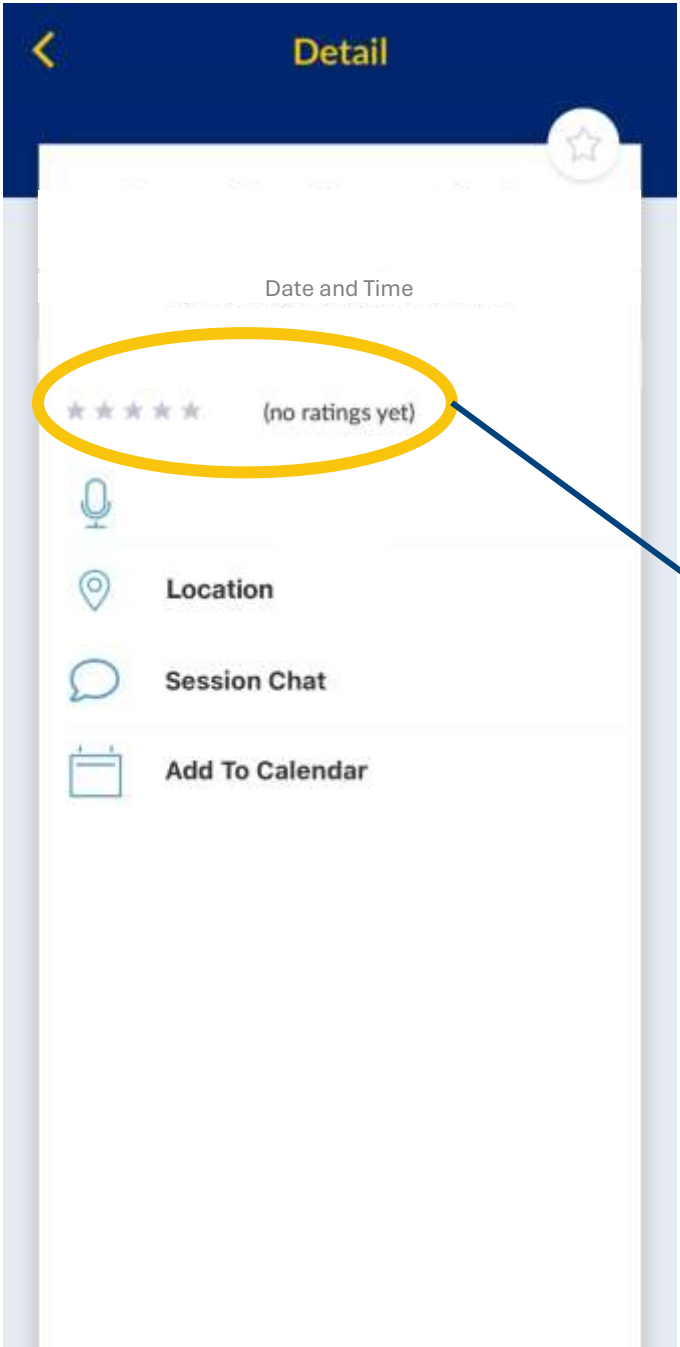
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Module Option



Agenda Option



Thank You



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