


8 Factors Driving the Experience Revolution in Retirement

1  **86% of AMERICANS** believe the nation faces a retirement crisis

Source: National Institute on Retirement Security

2 **RETAIL EXPERIENCES = HIGH EXPECTATIONS**

new standards set by retailers | financial firms look to catch up

enjoyment support
service
convenience

3 person-to-person
SEAMLESS CONNECTED EXPERIENCE
digital
external channels

4 **ADJUSTING TO AN "AUTOMATIC" WORLD**

enrollment | escalation | diversification | reinstatement

5 **4+ GENERATIONS IN TODAY'S WORKFORCE**

globally mobile | audience diversity

6 **FINANCIAL WELLNESS PROGRAMS**

expanding the conversation to reshape the future of retirement planning

7 **SHIFT IN FOCUS**

ASSETS → INCOME

"point-in-time" conversation | "life-long" dialogue

8 **PRESSURE TO DO MORE WITH LESS**

PRICE
VALUE

effective communications/interactions based on scalable infrastructure

DISCOVER THE LATEST TRENDS IN PARTICIPANT EXPERIENCE DESIGN.

Download The Experience Revolution at Broadridge.com/CXRevolution