



Women In Super 2011

A **brandmanagement** study of service for women in the superannuation sector

Background

CoreData is a specialist financial services research and strategy consultancy based out of Sydney, Australia.

The firm is part of the brandmanagement group, which has operations in Australia, the United Kingdom, China and the Philippines.



With a primary focus on financial services CoreData provides clients with both bespoke and syndicated research services through a variety of data collection strategies and methodologies.

Clients benefit from a dual offering of business-to-business and business-to-consumer research and consulting services.

The group provides clients with market intelligence, guidance on strategic positioning, methods for developing new business, advice on operational marketing and other consulting services.

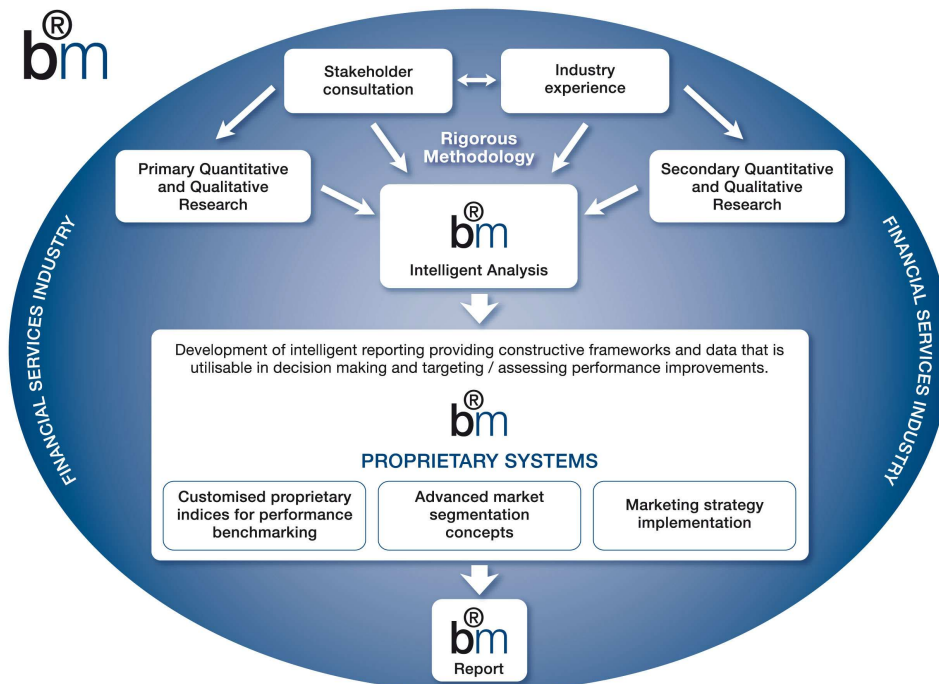
CoreData Research prides itself in identifying market trends at the earliest opportunity and formulating insightful quantifiable research that clients can use to help them stay ahead of the market and better meet the day-to-day challenges facing their businesses.

Our focus is on bringing deep market knowledge to research and strategy development.

The group's research is not just about information and data but at providing insight so clients can develop strategies that work.

The team is a complimentary blend of experienced financial services, research, marketing and media professionals, who together combine their years of industry experience with primary research to bring perspective to existing market conditions and evolving trends.

CoreData-brandmanagement has a number of syndicated benchmark proprietary indexes across a broad range of business areas within the financial services industry.



About The Report

This nationwide study attempts to understand the female mindset when it comes to superannuation.

The study is created using several vantage points of female engagement and interaction within the superannuation industry including: household role; experience and understanding; money relationship; financial concerns; information sources; usage of financial advice; relationship with super; attitudes towards retirement and levels of insurance cover.

The research seeks to highlight the ways in which the product and service needs of females differ from their male counterparts and the implications for servicing this market.

Using a randomly collected sample of Australians aged 18 and over, data will be collected via an online survey of CoreData's proprietary consumer database.

The primary focus of the research is to better understand the specific behavioural drivers and attitudes of women in relation to superannuation and life insurance.

The research will also assess females' product and service needs, knowledge and confidence when it comes to superannuation.

The results will be analysed from a range of perspectives including age, state, wealth and gender to identify the key differences between women and men.

Objectives

The main objective of the research is to assess how the super needs, attitudes and perceptions of women compare to men.

The report will cover aspects such as;

- Female role in household financial decision making
- Information sources relied upon for decision making
- Usage of financial advisers
- Level of experience and understanding of super
- Level of engagement with super
- Perceptions of super industry
- Level of life insurance cover
- Typical superannuation balance
- Sentiment towards super funds
- Financial concerns & security
- Key superannuation needs
- Impact of having a family on super needs
- Attitudes and expectations for retirement



Research Design

An online quantitative survey of around 30 questions will be developed and hosted by CoreData-brandmanagement.

The survey will be sent to CoreData-brandmanagement's proprietary consumer database of more than 100,000 Australians.

The target number of respondents is 1000 Australian super fund members, including at least 500 females.

Demographic data will be collected to allow segmentation of respondents including state, wealth, gender, relationship status et al.

Research Deliverables

The final deliverables will be:

- A full powerpoint report with analysis findings and strategic insight

The quantitative and qualitative data will be presented with appropriate strategic insight and illustrative charting.

Proposal Costs

The total cost is \$7,500 excluding GST.

These costs are exclusive of GST and include:

- Administration set up and project management
- Development of filters and question routing
- Programming and testing the survey and all links
- Hosting the surveys on the CoreData survey engine
- Use of the CoreData-brandmanagement panel

Timing

The report will be available for purchase in July 2011.



Key Personnel

Coredata-brandmanagement's focus is on bringing deep market knowledge to research and strategy development.

Our team is a complimentary blend of experienced financial services, research, marketing and media professionals, who together combine their years of industry experience with primary research to bring perspective to existing market conditions and evolving trends.

We are passionate about making a difference to our clients. Our success and research is not just about information and data but about developing actionable strategies that allow clients to improve their performance relative to competitors.

The personnel on the project will be:

- Project manager: Kristen Turnbull
- Analysis and interpretation: Kristen Turnbull and Andrew Inwood, supported by Tai Rotem and our data analysis team in Sydney, China and the Philippines.
- Reporting: Kristen Turnbull and Richard McClelland

ANDREW INWOOD B.Ec. (Syd) A.S.I.A.

Andrew Inwood is the principal of CoreData-brandmanagement and has more than 18 years experience in the Australian financial services industry.

He worked for Rothschild Australia Asset Management where he headed the marketing team for four years before moving to AMP Investments where he spent more than a decade as head of marketing, before being seconded to Virgin Direct in the UK to establish the finance and investment arm of the group.

KRISTEN TURNBULL BA Journalism, MBA (currently studying)

Kristen is head of Advice, Wealth Management and Superannuation based in the Sydney head office. She is responsible for writing of a range of syndicated market intelligence reports and bespoke research projects for advice and superannuation fund clients.

Before joining CoreData-brandmanagement Kristen was a financial journalist for seven years, including four years in London where she wrote for a range of institutional and retail finance publications. Upon returning to Australia she worked for media publishing house Conexus Financial.



MARCIA GRAND ORTEGA BPsych, BSocSci (Soc), MPH (IHD) currently studying

Marcia is Research and Marketing Specialist. Marcia's core skills are in managing the field work and analysis teams on a day to day basis, marketing, sales and research design.

Marcia has 3 years experience in running research operations and is the core point of contact for most projects.

She obtained a Psychology degree in Argentina, came to Australia to pursue post graduate qualifications and to build her research career. Before joining CoreData-brandmanagement, Marcia worked for 3 years at American Express as a Marketing Executive.

TAI ROTEM BSocSci (Psych) Masters (by Research Thesis)

Tai Rotem is brandmanagement's research specialist. He has been developing and implementing market research for over 10 years. Tai has taught statistical methods at the UNSW School of Research for 4 years.

Tai develops and maintains brandmanagement's proprietary research and question banks and he is involved in the analysis and interpretation of our research.

RICHARD MCCLELLAND B. Com. Grad. Dip. (Financial Planning)

Richard is a financial services research analyst and project manager based in the Sydney head office. He is responsible for managing a range of syndicated market intelligence reports and bespoke research projects for CoreData clients.

Prior to joining CoreData-brandmanagement, Richard worked in financial services for over five years including two years as a paraplanner to a highly successful wealth management business and two as a team leader for a national margin lending business.



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