

**Understanding your audience & how best to connect with them**

Below is an example of a generational marketing template you can use to better understand and connect with your audience. If you scroll further, there are blank spaces to use and customize to best fit your insurance agency’s needs.

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| **Audience Segment** | **What to Consider About Them** | **What to Send Them** | **How to Connect with Them** |
| Generation Z  *22 & younger* | Considered the new  traditionalists  They have never lived without Internet  Value authenticity & “realness” | “Not sure where to start? Let us help!”  “Time is your friend. Invest now & reap the benefits later.”  “Stay healthy this next year by making sure you have the right coverage.” | Social Media, Texting, Email |
| Millennials  *23 – 39* | Shops around & negotiates  Open-minded, optimistic, highly motivated & goal-oriented  Looking ahead to future  Diversity, honesty, humor & uniqueness appeal to them | “Let us help take care of you and your loved ones.”  “Getting married/having a baby? Let’s make sure you’re covered.”  “Time is your friend. Invest now & reap the benefits later.” | Word-of-Mouth, Referrals, Social Media, Email, Calls, Group Events |
| Generation X  *40 – 52* | Family-orientated  Highly educated  Skeptical & disillusioned  Growing families  Turned off by sales pitches &  “salesy” personalities | “Are you behind on saving for retirement? We can help!”  “Are your affairs in order when thinking about your children?”  “Orthodontics/College in the future?”  Are your health needs changing? | Invite them in for consultation, Facebook, Referrals, Group Events |
| Baby Boomers  *53 – 71* | Value individualization, self-expression & optimism  Workaholics (many still working post-retirement)  Concerned about health, aging, & weight gain  Focused on the “me” | “Are your savings not where you wanted?”  “Has your (or your spouse’s) health changed/are you getting new prescriptions?”  “Want to be healthier this coming year? Here’s how we can help.” | Radio, Newspaper, Open House/Seminar, Direct Mailers, Network TV, Email |
| Silent Generation  *72+* | Slow to embrace change  Many are still in good health & are active  Value saving, morals & ethics | “Has your (or your spouse’s) health changed/are you getting new prescriptions?”  “Is your coverage still enough for what you need?” | Newspaper, Open House/Seminar, Direct Mailers, Face-to-Face Communication |

*Generational Information from AABRI “Marketing to the Generations”*

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