

e-Delivery Promotions on the Web

Overview

Paperless Delivery-there's no question that this is most providers' preferred method for delivery of investor communications. Unfortunately, adoption of e-Delivery in general has been painfully slow. Are providers missing the mark in their promotion of their e-Delivery services?

DALBAR recently tracked Web-based e-Delivery promotions on financial Web sites. A review of 176 Mutual Fund, Defined Contribution and Life Insurance/Annuity consumer Web sites found e-Delivery promotions on:

- » 50% of Mutual Fund consumer Web sites
- » 29% of Defined Contribution plan participant Web sites
- » 17% of Life Insurance/Annuity consumer Web sites

In order to gauge the impact of e-Delivery Web site promotions on consumer behavior, DALBAR polled a group of 107 Internet users about their utilization of e-Delivery services and the triggers that caused them to subscribe.

DALBAR's findings showed that among those already utilizing the Internet:

- » More than ¾ currently do or have at one time received financial documents electronically.
- » Providers' Web site promotions had a significant impact on subscribers' decision to elect e-Delivery.
- » While survey participants report responding most to the [convenience](#) of e-Delivery, DALBAR found that this was not the top benefit promoted.

This Report

- à e-Delivery Promotions on the Web includes analysis of:
 - Ø e-Delivery utilization by internet users
 - Ø Triggers for election of e-delivery
 - Ø Current e-delivery promotions
 - Ø Effective and non-effective promotions (includes a ranking of Top 10 promotions)

Costs

The cost for e-Delivery Promotions on the Web is \$1500.

Note: This is a product description that is intended to illustrate a product that will be delivered to a subscriber. This is not a proposal and is subject to revision without notice. Until an invoice is issued and paid, DALBAR is under no obligation to produce the goods or services as described here.