# CURRENT TRENDS IN FINANCIAL SERVICES MARKET RESEARCH

*Zeldis's Financial Services Research Team has had a busy year so far in 2024. Here are some key research topics and trends that we have seen this year.*

*These come from our extensive qualitative and quantitative research with some of the largest financial services providers.*

## Understanding Differences across Gender and/or Generations

Many financial service providers strive for a more equitable financial services industry and recognize that to do so they have to better understand potential differences and similarities across genders, generations, ethnicities, etc. We have completed several studies this year that explore the unique financial needs of various audiences - women, Gen Z, etc.

**01**

## A Focus on Consumer Financial Wellness

We have noticed that financial services providers are committed to helping their clients understand their finances and feel in control. As such we have helped them explore different aspects of financial wellness – the role of financial literacy, understanding what makes clients feel empowered when making financial decisions, exploring how financial products fit into a financial plans to give consumers peace of mind, etc.

**02**

## B2B Data Quality

Data quality is the foundation upon which research is built – garbage in garbage out as the saying goes. Getting the right participants is important with any audience but can be challenging with specialized audiences such as retirement plan sponsors, HSA managers, financial professionals focused on UHNW clients. We have been working with hyper specialized recruiting partners to ensure we speak with the "right" people.

**03**

## Leveraging Thought Leadership

More and more brands that we work with in the financial services market are realizing that offering best in class products and services is not enough to differentiate themselves in the market. This is especially true when it comes to winning over a B2B audience. These companies are making a focused effort to provide thought leadership, part of which includes primary research data.

**04**