

May 2021

Consumers and Taxes - US

“Taxes are due every year, even in a pandemic. Software dominates the DIY market, while accountants dominate the professional. For an industry that does not seem to change, tax preparers need to highlight how their strategies can prove most efficient and profitable for consumers.”

– Jennifer White Boehm, Associate ...

April 2021

The Banking Experience - US

“Banks were considered essential and kept open during the peak of the COVID-19 pandemic, but no one was really visiting their local branch out of concerns for virus exposure. Although vaccinations are becoming more widespread, the accelerated adoption of digital banking by a number of banking customers over the past ...

March 2021

Gig Economy - US

“The gig economy has grown in popularity over the past few years, as people keep looking for alternative ways to make money on their own time. During the pandemic, delivery services were in high demand, as consumers feared contracting COVID-19. The gig workers delivering these essential services were among the ...

Financial Needs of Emerging Affluent and Affluent: Incl Impact of COVID-19 - US

“Having already achieved many financial goals often missed or delayed among lower-income demographics, emerging affluent and affluent adults are a target that needs to be approached with more finesse than the standard finance consumer. They frequently look to professional financial advisors when seeking out finance information, but well over half ...

Innovations in Insurance - US

“The immediate effects of the COVID-19 pandemic on the insurance industry have been mainly technological. Consumers are increasingly comfortable with the digitization of healthcare, but have been slower to adopt technology offered by insurance providers. Younger consumers are more willing to allow their data to be tracked, but insurers have ...

Consumers and the Economic Outlook - US

“Despite COVID-19 putting a dent in consumers’ finances and morale, many still remain hopeful on their financial situation going forward. A recovering US economy, rallied by the availability of a vaccine, has instilled optimism in many consumers during tumultuous times. In spite of that, how well this recovery can be ...