

AGENCY UNIVERSE STUDY



Released every two years, the Agency Universe Study provides critical insights into the independent agency system's scope and key attributes including agency revenues, carrier relationships, diversity, social media, marketing, challenges and needs as well as identifying new and emerging issues. This information is instrumental in developing more effective marketing and business strategies for our stakeholders, including company partners, independent agency principals, carriers, and the Big "I" for broader industry initiatives and education.

2026 RESEARCH TASK FORCE

The Agency Universe Study is produced through a collaborative effort between the Big "I", Zeldis Research Associates and the Research Task Force.

Research Task Force Participation: Your Company's Opportunity

- **Identify Your Representative(s):** Designate an individual(s) to represent your company on the Research Task Force. Ideal candidates may have experience with survey development, data analysis, an interest in results for internal strategic planning, education, or communications. A multitude of skillsets are valued in this research project and representing your company voice and interest.
- **Commitment:** Task Force members will have an active role requiring an estimated 5–10 hours throughout the next 18-months. This includes participation in virtual orientation, kickoff, questionnaire review, survey sample assistance, industry outreach, and review of findings and the draft report.
- **Benefits of Participation:** Future One partners, and Research Task Force members receive acknowledgement in both releases, advance copies, the data banners, and a company-wide invitation to a Zeldis-hosted Zoom meeting highlighting the study's findings.

ACTIVITY TIMELINE

A full schedule will be provided in August.

- **2025**
 - Identification of Research Task Force participants to [Jennifer Becker](#) (May – August)
 - Background information provided and orientation for all new Research Task Force participants
 - Initial survey draft distributed and online meeting kick-off for feedback and discussion
- **2026**
 - Follow-up online meeting, revised draft and survey made final, sample lists received
 - Survey in the field
 - Banners delivered and review of draft report
 - Report made final
 - Report released to the industry, Zeldis webinar presented (September)

2024 RESEARCH TASK FORCE PARTICIPANTS

Jeff Bair

Head of IA Marketing & National Accounts
Foremost, A Farmers Insurance Company

Jennifer Becker

Senior Director, Agent Development, Research and Education
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Kristi McHugh

Head of Customer and Market Research
Hartford Steam Boiler

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Independent Insurance Agents & Brokers of America

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Jay Rhoads

Zone Sales Director
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Lori Schoenenberger

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Amerisure

David Teal

Research Director
Liberty Mutual Insurance/Safeco/State Auto Insurance

Angie Wysznski

Vice President of Global Customer Experience
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