

# Building the AXA Brand in the U.S.

September 22, 2004



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*Be Life Confident*

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# Agenda

- Global Brand Strategy
- U.S. Brand Objectives & Strategies
- Key Branding Initiatives
  - Equitable Name Change
  - Retirement Stories: AXA as “Expert”
  - Firm-level Marketing
  - The AXA Game Plan



# [ Brand Strategy

- One brand:
  - ‘ AXA ’ in the whole world
- In one field of activity:
  - ‘ Financial Protection ’
- Along one positioning:
  - ‘ Close / Qualified ’
- With one concept /signature:
  - ‘ Be Life Confident ’



# In One Field of Activity: 'Financial Protection'

- A way to communicate the whole range of our activities: P&C, Life, Investments and Banking services.
- An expression of our inventiveness in the setting up of a new category
- An escape from the very bad image of Insurance in many countries
- A leadership statement as implying a vast range of products
- A direction of development for our skills (to make new products, to approach customers, etc...)



# Along One Positioning: 'Close / Qualified'

- 'Qualified' is the most expected generic attribute: AXA is truly recognised as an expert in its fields
- 'Close' is the second most expected generic attribute: AXA is judged as having a rather poor 'human touch'
- 'International' status is not considered as a key market expectation. It is however our most differentiating attribute and does not need any further emphasis

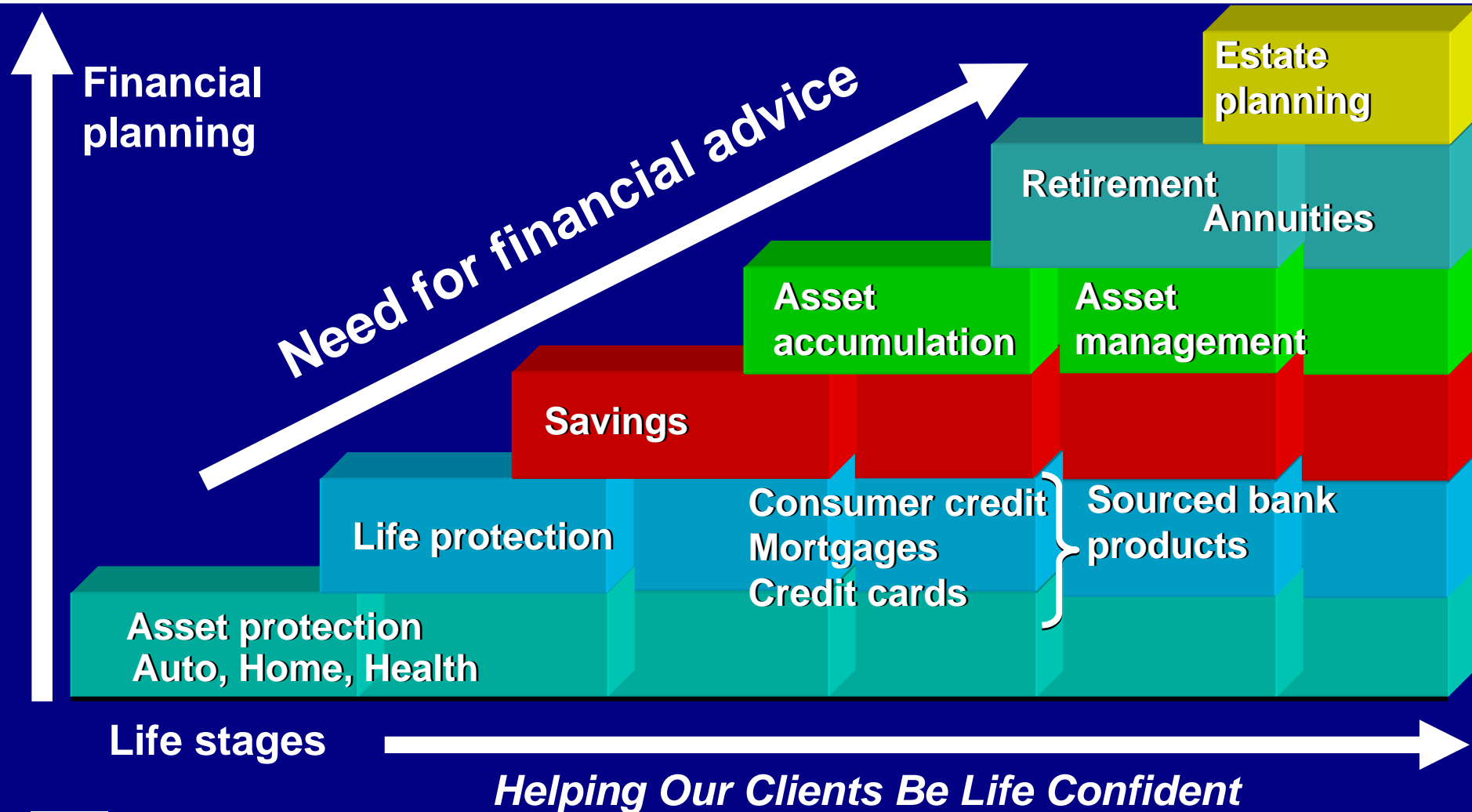


# With One Concept/Signature: 'Be Life Confident'

- A dynamic and optimistic view that fits well with the AXA culture of growth and forward-looking
- An evolution, not a revolution
- Last corporate statement carried the same values as current proposal
- A high potential in the current competitive context
- Full research validation (tested in five cities on three continents; also tested in US and UK)



# One brand covering a wide range of categories/products



# Brand Objectives for the United States

- Deepen current client relationships & cross-sell
- Increase sales through new relationships
- Build brand recognition and image among target audience



# Brand Strategies

- Leverage Equitable name awareness and image
- Leverage our relationship-based business model and position the AXA brand as “close” and “qualified”
- Become embedded in local communities
- Develop memorable AXA-branded events



**Leverage brand awareness and image  
through Equitable name change**

# From “Equitable” to “AXA Equitable”

A critical step towards one AXA global brand

- Leverages the strong name and heritage of Equitable and the global strength of AXA
- Creates an estimated 30 million new impressions for AXA every year



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# MONEY “An AXA Financial Company”

- New logo clarifies the relationship of MONEY and AXA



**Leverage our relationship-based  
business model and position AXA as  
“close” and “qualified” through  
Retirement “Stories”**

# “News You Can Use” Retirement Stories

- Present complex, hard to understand issues to local news media in a manner easily digested by the public
- Stories built around AXA spokespersons who are positioned as the “experts”
- Repurpose content on AXA Website, trade shows and financial seminars



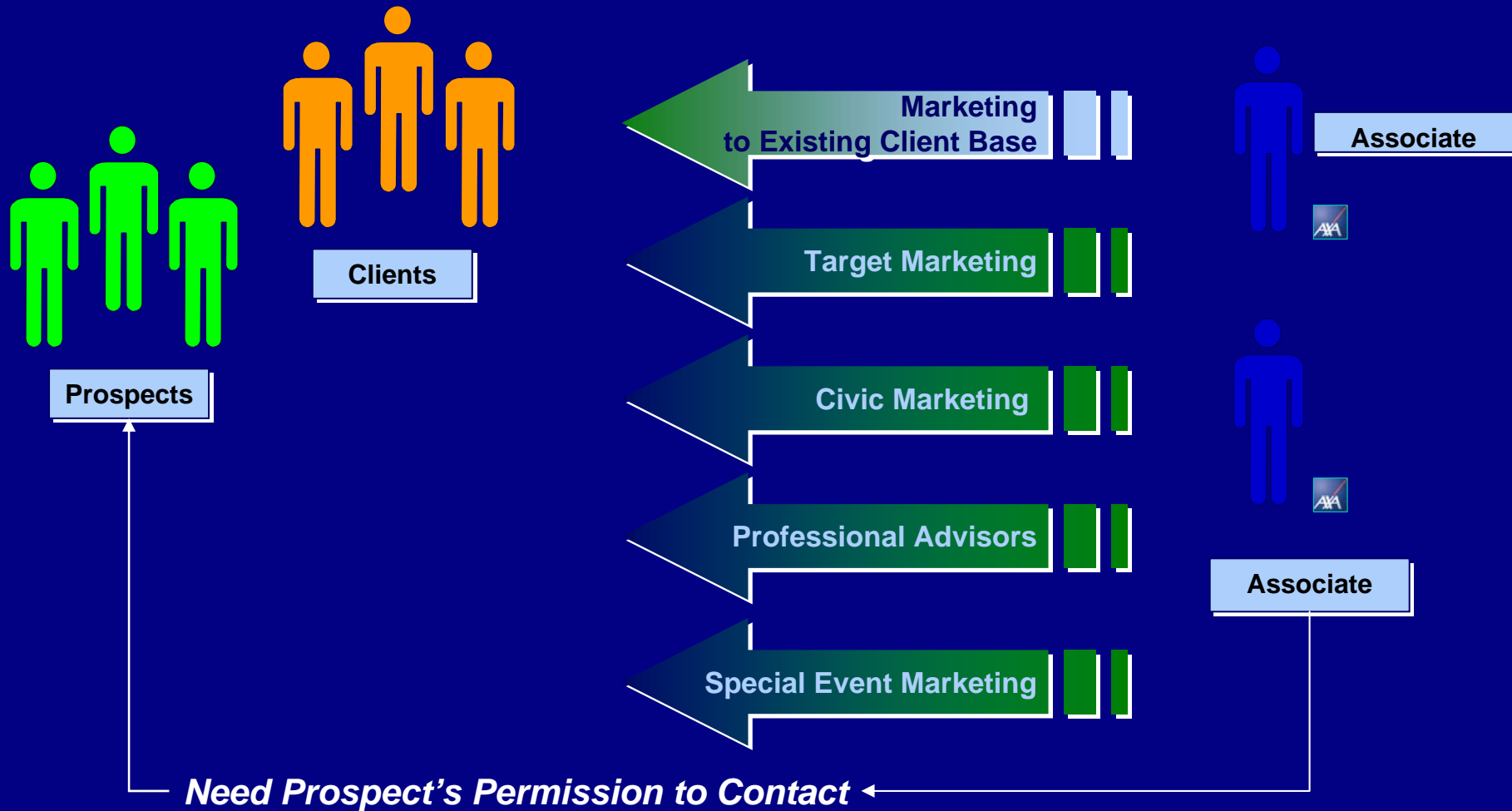
**Become embedded in local communities  
through Firm-Level Marketing**

# Firm Level Marketing

- Create new sales, prospecting and relationship opportunities by consolidating individual marketing efforts within a branch and developing a strategic plan for the branch to implement in their local markets
  - Existing client base
  - Target Marketing
  - Civic Marketing
  - Professional Advisors
  - Special Event Marketing



# Firm Level Marketing Opportunities



**Develop memorable AXA branded events  
through the AXA Game Plan**

# The AXA Game Plan

- A fully integrated marketing sponsorship of major entertainment and sports venues in major markets
  - New York – Madison Square Garden
  - Detroit – Joe Louis Arena
- Leverages our relationship-based business model



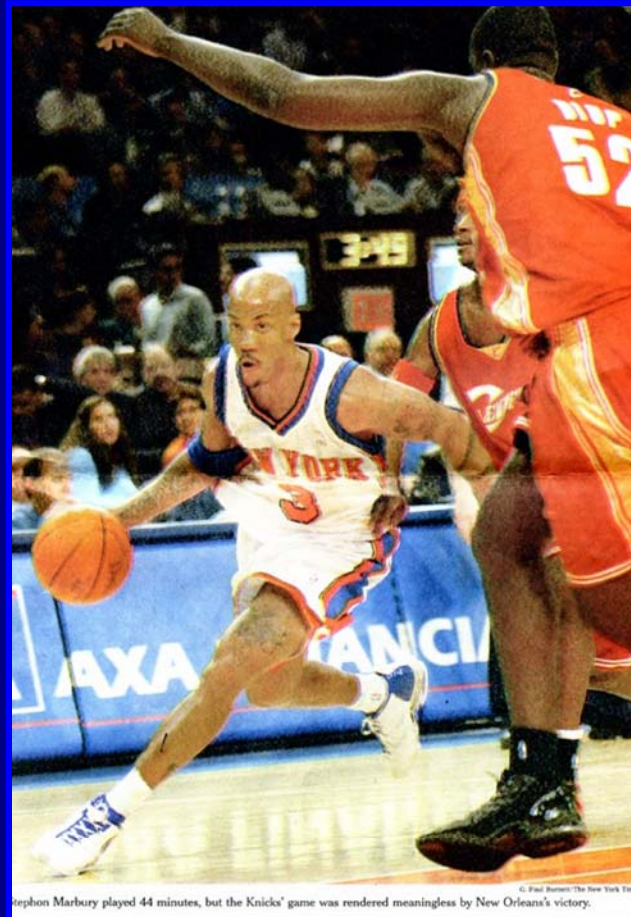
# 4 Million Affluent Sports Fans in New York will See Signage at 175+ Events Yearly

- Center hung scoreboard (photo taken from AXA entertainment suite)



# AXA Logo Captured on TV & Newspapers

- Knicks Scorer's Table, as seen in *The New York Times*



Stephon Marbury played 44 minutes, but the Knicks' game was rendered meaningless by New Orleans's victory.



# “AXA \$50,000 Shoot for the Loot”

- Playoff Promotion gets AXA name “Seen and Heard”



# Key Metrics

- Increased Brand Awareness
- Positive Shift in Brand Image
- High Level of Client Satisfaction
- Increased Cross-Sales
- Incremental Premium Growth





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