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## Researching the Orange Envelope in Sweden information

### **Background**

Since 1999 the Orange Envelope provides an annual pension statement and projections for every individual insured in the Swedish national pensions system.

The envelope is produced and distributed in different versions for three major target groups:

- Old-age pensioners
- General pension savers
- New pension savers

The Orange Envelope for general pension savers is sent out in February-March to about 5.4 million individuals. This is the original version that was first sent out in 1999.

The versions aimed at old-age pensioners (0.9 million) and new pension savers (0.15 million) were both established in 2007.

All three versions of the orange envelope are followed up via interview surveys.

### **Survey objectives**

The main aim of the surveys is to see to what extent the recipients open the envelope, read and understand the contents.

The surveys also contain questions about other aspects, such as:

- Spontaneous awareness of the sender of the information
- Spontaneous awareness of the contents of the envelope
- Evaluation with regards to:
  - Valuable and actionable information
  - Missing information
- Customer Satisfaction Index
- Attitude towards statement information on the Internet
- Perceived knowledge about the national public pension system
- Confidence in the national public pension system
- Background questions
  - Gender
  - Age
  - Educational level
  - Personal income
  - Occupation

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### **Data collection**

Telephone interviews. Average interview time range from 6-10 minutes per interview depending on target group.

### **Sample**

Random probability samples from the registers with recipients of the respective envelope version. Recipients abroad (0.2 million) are excluded.

### **Number of interviews**

- Old-age pensioners 600 interviews
- General pension savers 1,000 interviews
- New pension savers 600 interviews

### **Fieldwork**

The fieldwork is conducted in connection with the distribution schedule for the statements. The interviews are carried out during a 5-day period starting ca one week after the envelopes reach the insured.

### **Report and analysis**

The surveys are set up, conducted and analysed by an external market research organisation that compile the results in a report with commentaries, graphs, data tables and lists with verbatim answers.