

THE DUBS

// Content marketing for HNW individuals

October 2018

Content Marketing

Content marketing defined

Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience – and, ultimately, to drive profitable customer action.

The Customer Journey Begins with Content

86% of buyers conduct non-branded search queries

84% of people expect brands to create content

85% of users ignore paid ads and focus on organic search results

62% Content marketing offers three times the leads of traditional marketing, while costing around 62% less

5x Companies can increase their conversion rates five times higher than companies that don't use content marketing

Sources:

insights.newscred.com/content-marketing-statistics

www.highervisibility.com/blog/30-content-marketing-statistics-trends-data-strategy



And Relies on Distribution LinkedIn - Reach

Over

500m

Members worldwide

LinkedIn crossed the half-billion user mark in 2017. (Business Insider Intelligence, TechCrunch & Fortune)

Over

8m

Australian LinkedIn users

Over a third of all Australians (smartcompany)

LinkedIn - Engagement

260m

LinkedIn users login monthly.

4.2m

Australian LinkedIn users login monthly.

40%

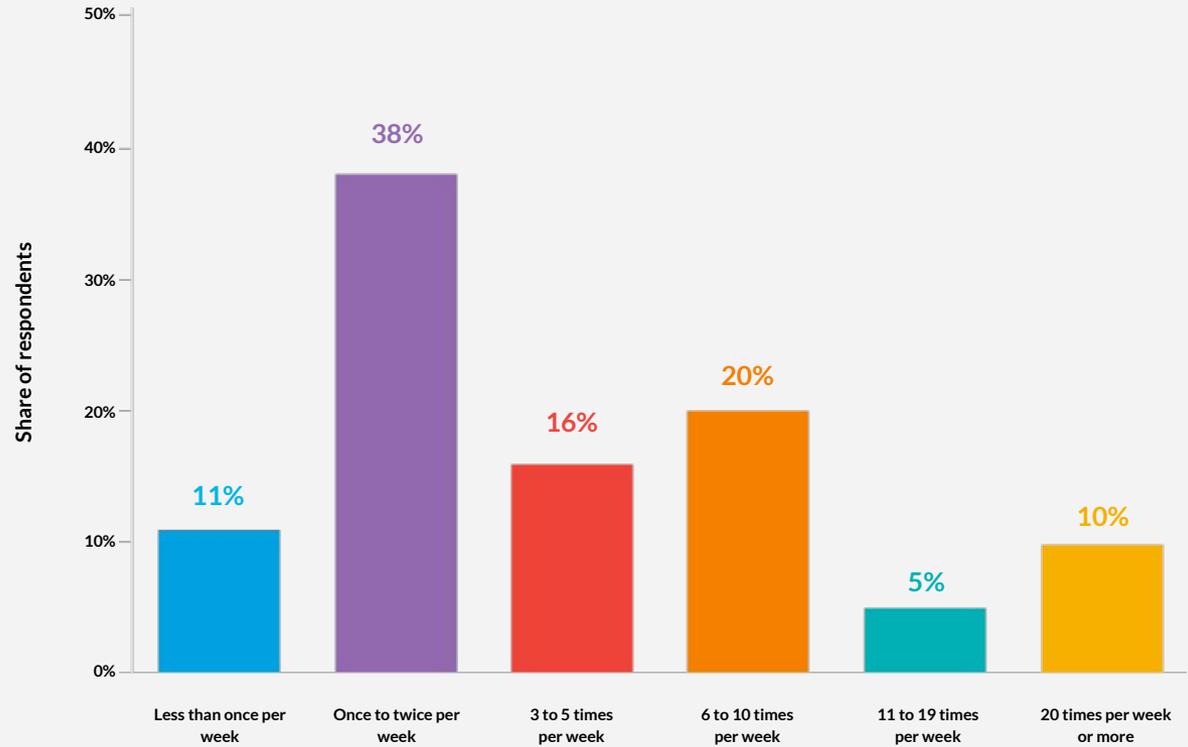
of monthly active users use LinkedIn daily.



LinkedIn - Engagement

Australian frequency
of LinkedIn use

(March 2017 - statista)





LinkedIn - HNW Audience

LinkedIn usage high across all asset levels

36%

of Affluent HNW
(\$1-5M)

43%

of Ultra Affluent HNW
(\$5-25M)

31%

of Uber Affluent HNW
(\$25M +)

LinkedIn - Engagement

62%

of advisors who actively prospect on LinkedIn acquired new clients.

71%

say their target clients are on LinkedIn.

52%

of affluent investors say they would interact with financial advisors on social media.

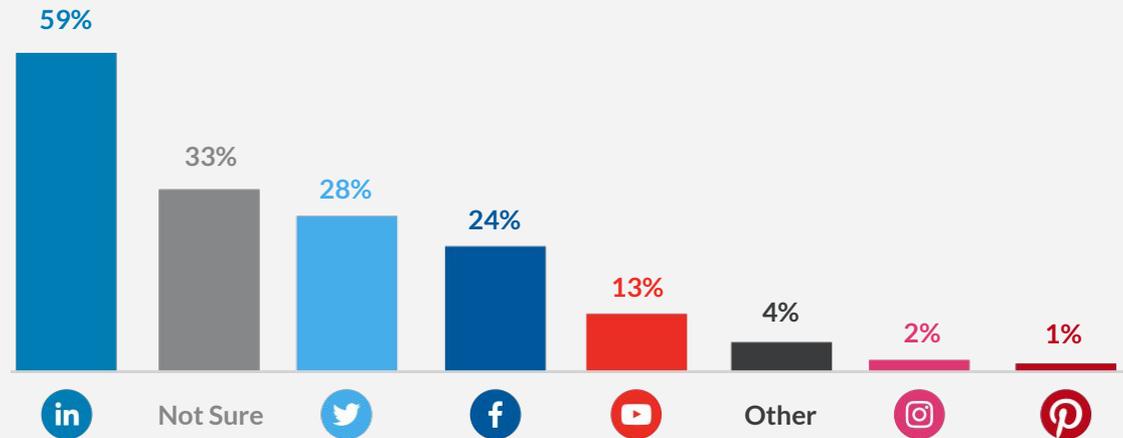
Currently 4%



LinkedIn - Engagement

Which of the following social media channels generate leads for you?

LinkedIn is the #1 social network for lead generation by a long shot.

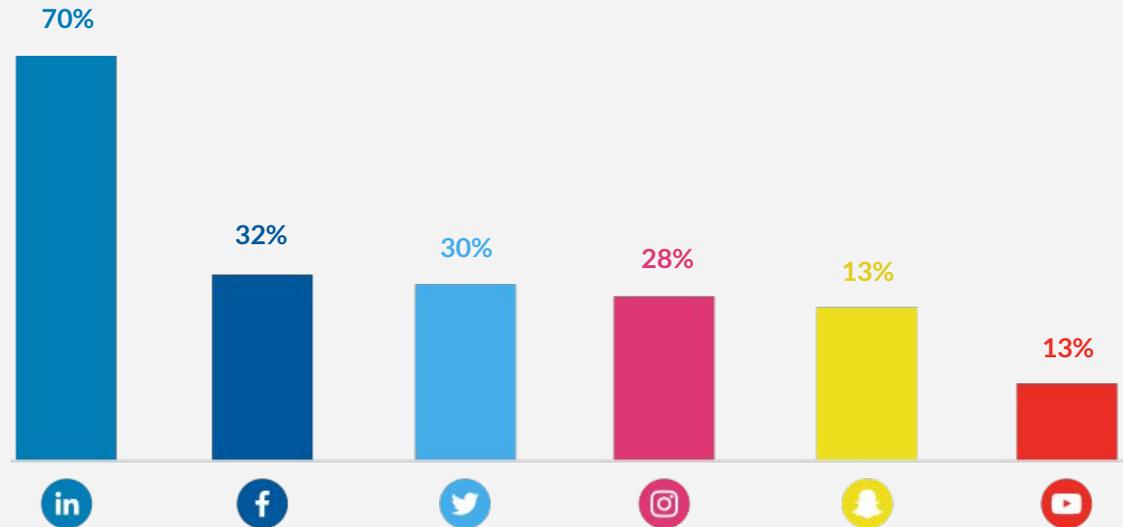




LinkedIn - Engagement

LinkedIn is undisputedly the most trusted platform.

(June 2017 - Business Insider Intelligence 'Digital Trust Report')





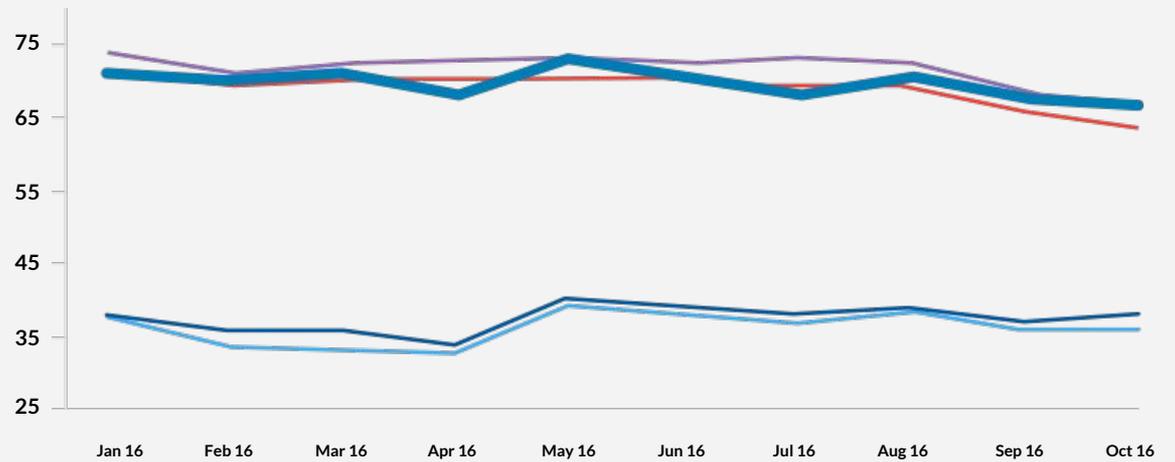
LinkedIn - Engagement

LinkedIn is just as trusted as venerable media brands

On a scale of 0 to 100, how much do you trust information you find on the following sites?

0 = Untrustworthy

100 = Most trusted



LinkedIn

WSJ.com

Forbes.com

Facebook

Twitter

LinkedIn - HNW - Myths

- 1 Digital is only for young HNWI**
More than half of HNWIs aged 40+ would consider leaving their firm if an integrated channel experience is not provided.
- 2 Digital is only for HNWIs in lower wealth bands**
Even the wealthiest HNWIs expect a largely digital wealth relationship.
- 3 Digital is only for HNWIs directing their own portfolios**
Even advice-seeking HNWIs expect their wealth management relationship to be primarily digital.



LinkedIn - HNW - Myths

2/3

LinkedIn found that two-thirds of HNWI visited LinkedIn monthly and used it as a resource for investment research and saw it as a critical tool for building business relationships. Social allows wealth managers, for example, to provide real-time recommendations and updates based on their customers behaviours.

So, finance companies, in particular, should be seriously considering the massive impact which using their social channels to provide investment strategies for high net worth individuals and prove themselves experts in their industry.

LinkedIn - HNW - Millennials

\$ **30** Trillion

By 2020, Millennials and Generation X will control \$30 trillion or half of all investable assets.

66%

of Generation X found social media profiles of their wealth managers to be extremely influential.



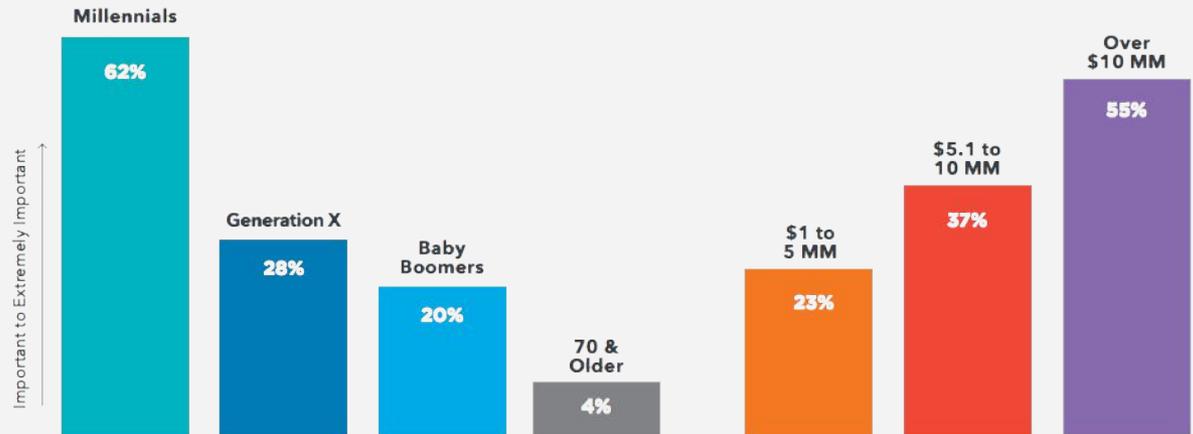
Communication technology during the informative early stage is more important to the wealthiest HNWIs than access to automated investing tools.



LinkedIn - HNW - Millennials Customer Journey

Consideration & selection

Importance of wealth manager's adoption and use of social media in your relationship



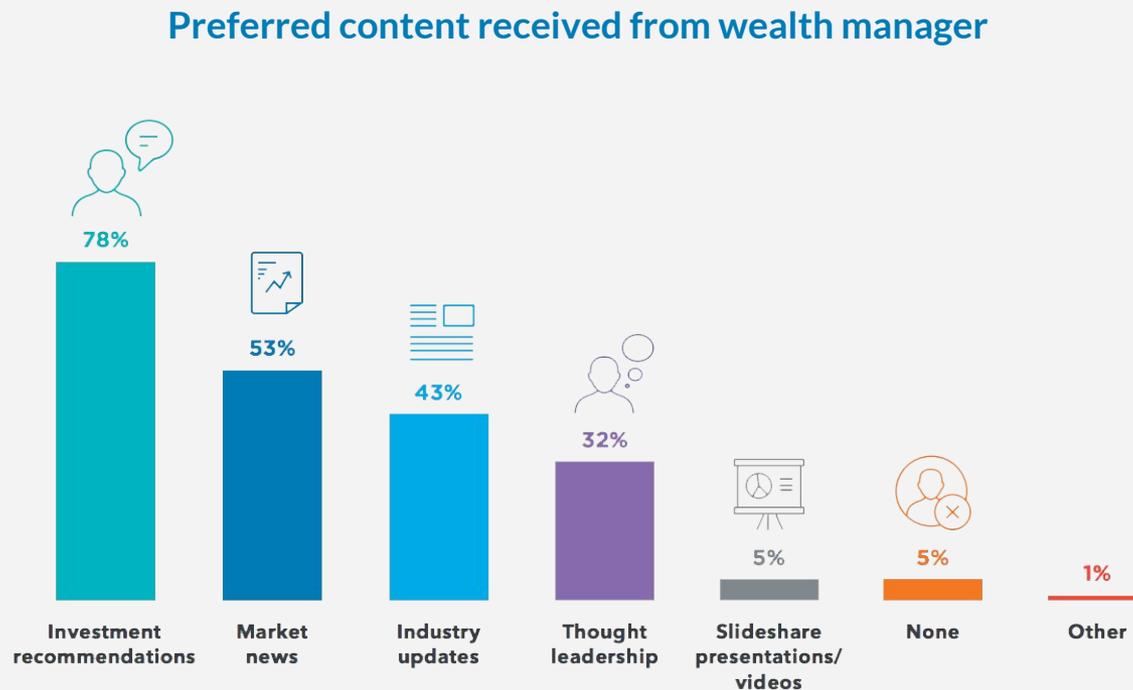
Note: Based on 202 respondents selecting important to extremely important ratings, including 47 Millennials, 50 Generation X, 78 Baby Boomers, 27 age 70 & Older, 140 \$1-5 MM, 44 \$5.1-10 MM, and 18 Over \$10 MM.

- business.linkedin.com/content/dam/me/business/en-us/marketing-solutions/cx/2016/pdfs/fin-wealth-mngmt-casestudy-september-19-2016.pdf

LinkedIn - HNW - Millennials Customer Journey

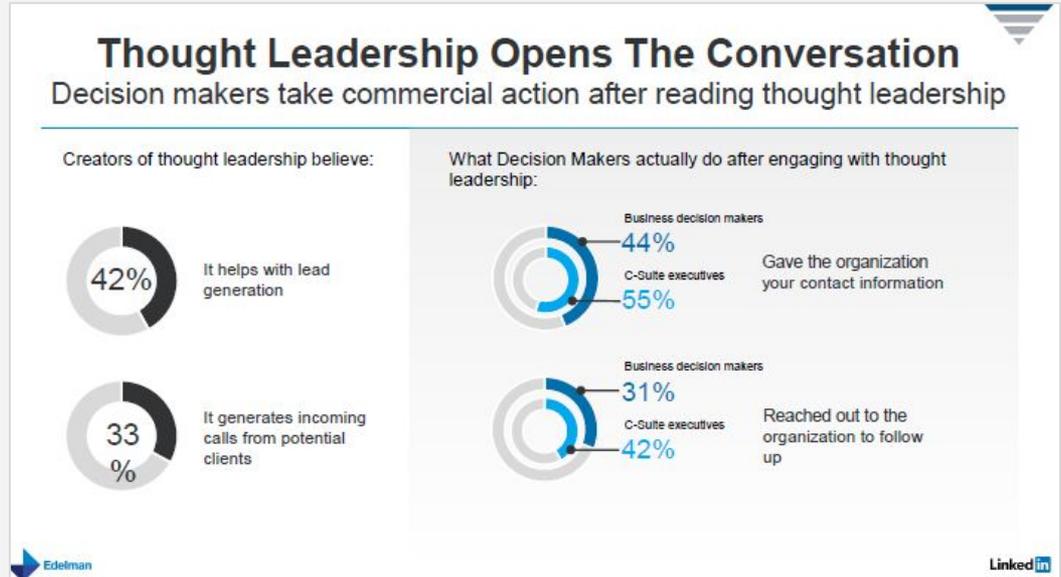
Keeping the relationship alive

With initial investment decisions made, HNWIs look to their wealth advisors to keep them updated on what's going on in the market and for recommendations on what they should do next. These needs are relatively consistent regardless of investable assets, but some generational differences do exist.





LinkedIn - Thought Leadership Content





LinkedIn - Thought Leadership Content

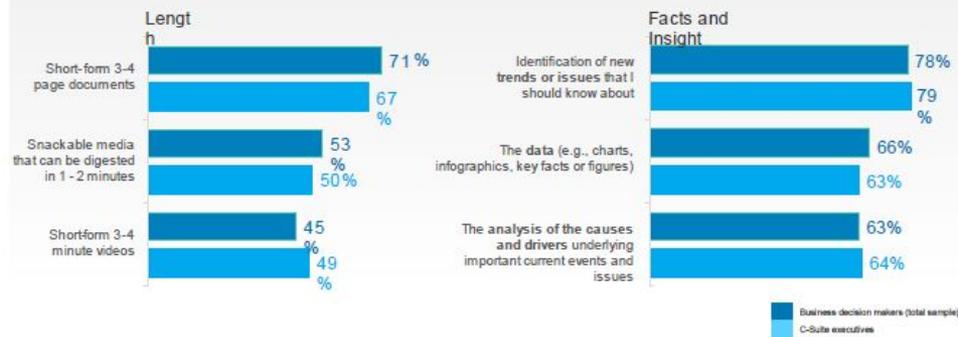




LinkedIn - Thought Leadership Content

Thought Leaders Need to Deliver Facts, Insights and Substance... Quickly.

Percent who rate each factor as important in getting them to engage with thought leadership (top 3 shown)





Contact Us



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