cogent syndicated

Cutting Through the Investor Marketing Clutter™

Evaluating marketing and the content that maximize investor brand engagement

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Breaking through the clutter is an increasingly complex and challenging endeavor for asset managers and distributors targeting affluent investors. The need to customize content is critical, as investors report an overwhelming volume of communication. To ensure acquisition efforts reach the relatively few investors in the affluent market who are ready to make a move, asset managers and distributors must use the ever-expanding toolbox of digital and sophisticated targeting techniques.

Cutting Through the Investor Marketing Clutter identifies the best-in-class approaches for maximizing the reach and impact of investor-based marketing efforts. The report will help asset managers and distributors optimize digital experiences and determine the best way to allocate their marketing spend to differentiate their content and stay relevant and competitive.

BOOST ENGAGEMENT

Identify the most effective communication channels to increase investor engagement with marketing collateral

IDENTIFY BEST-IN-CLASS MARKETING

Expand understanding of best-in-class practices across email, print mailings, websites, apps, videos, webinars and more

IMPROVE MARKETING ROI

Optimize marketing budgets by maximizing reach and impact of investor marketing campaigns

Cutting Through the Investor Marketing Clutter Overview

AREAS OF INQUIRY

Communication Preferences

- Identify affluent ready-to-act investors' consumption behavior and routines with different types of investment information and marketing collateral
- Gauge perceptions and value of and response to (e.g., shred, file, read) marketing materials
- Uncover distinct preferences in content and frequency for each communication type
- Assess use of third-party sites that aggregate product information
- Investigate emerging trends in marketing communication

Content Relevance

- Pinpoint best-in-class content and pain points with marketing contact
- Evaluate specific provider websites and webinars
- Determine the most effective tools, resources and user experiences
- Determine the types of digital content that drive repeat visits
- Define areas of unmet needs in case studies, thought leadership and market insight

Personalization Strategies

- Understand the role and influence of customization on affluent ready-to-act investors' likelihood to consume and/or share content
- Pinpoint best-in-class examples of tailored marketing and content
- Determine the optimal marketing mix, including frequency and look and feel

Brand Differentiation

- Identify market leaders and best-in-class players that prompt action
- Isolate specific brand detractors and associated pain points

SAMPLE SIZE AND METHODOLOGY

- 45 affluent investors with at least $100,000 in investable assets including DC plan and IRA assets and excluding the value of primary real estate
- Online discussion boards
- Three types of affluent ready-to-act investors who are likely to open an investment account or purchase a mutual fund or ETF in the next three months

PUBLICATION SCHEDULE

- Survey fielding: August 2019
- Publication: October 2019

SUBSCRIPTION INVESTMENT: $40,000

- Full report and WebEx presentation
- Transcripts
- Custom report and presentation with an in-depth assessment of marketing collateral

Cogent Syndicated is the most trusted, reliable and agile source for wealth management insights.

We've been inside the industry for over 20 years. Every single day we are talking to your most valuable clients, customers and prospects—they know us and they trust us. Our curated, stable sample of investors is truly representative of the entire affluent investor universe. Our team of industry experts distills data to help brands translate human behavior into future products and messages that keep you ahead of transforming market needs.

Pinpoint competitive weaknesses to elevate brand, increase market share and benchmark your firm against competitors with our robust suite of investor research.

COGENT BEAT™ INVESTOR
Monitor investor sentiment, product and distributor perceptions and future investing behavior

MEDIA CONSUMPTION™ INVESTOR
Track media usage patterns and preferences to inform media buys and maximize investor reach

INVESTOR BRAND BUILDER™
Enhance investor segmentation and identify opportunities to boost market share and profitability

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