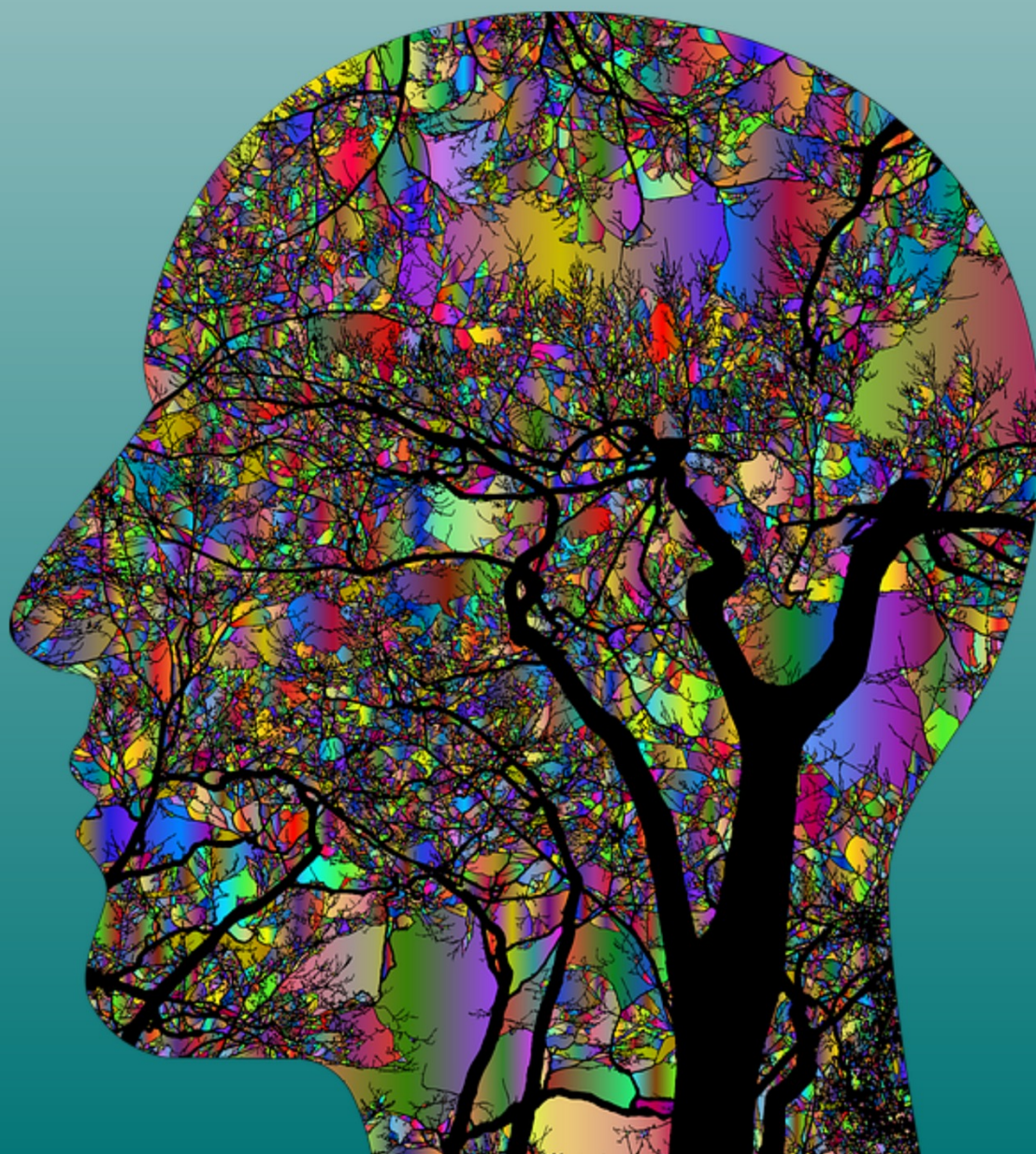


Panacea Adviser

Financial Adviser Content Survey May 2021

Based on 216 Responses



PANACEA CONTENT SURVEY ANALYSIS

Every year Panacea runs a content survey with it's community to:

- understand what appeals to recipients of our communications
- determine what they are most likely to engage with and why
- recognise what they want to be seeing more of

This year we had a great reaction with 216 responses. We share these findings with providers so that going forward both ourselves and partners can improve what we offer our community for a better outcome all round.

Your input and views are really important to both us and our provider partners as the communications that adopt the principles of these content surveys are those that regularly see better engagement.

We hope you find this of interest and if you have any questions please don't hesitate to contact :

[Derek Bradley](#), CEO

[Sarah Paul](#), Marketing Director

Q1 - WHAT STOPS YOU READING AN ARTICLE IN A BENTO BULLETIN, PANACEA SOLUS MAIL OR OTHER INDUSTRY NEWSLETTER?

Answer	%
The benefits of reading it aren't obvious to you	46.30%
The subject matter isn't of interest to you	38.89%
The subject line doesn't engage you to open / read	29.63%
The content is too long	22.22%
Anything else?	16.67%
Time of day you receive it	12.96%
The image is bland/not eye catching	7.41%
The content is too complex/jargon-heavy	5.56%

Comments:

The main theme of the comments were relating to not having enough time to read everything!

Winners:

- Make the benefits of the article obvious
- Make the subject line engaging
- Ensure the content is punchy and to the point
- Time is a large factor with our audience – they need to know that the content is worth it!

Q2 - THROUGH WHICH OF THE FOLLOWING ONLINE FORMATS DO YOU PREFER TO LEARN ABOUT PRODUCT PROVIDERS, THEIR PRODUCTS OR THE SERVICES THEY OFFER?

Answer	%
Shorter articles or content	59.26%
Webinars/webcasts	59.26%
Slides or presentations	35.19%
Videos	29.63%
Sales Aids	24.07%
Longer articles or content (e.g., eBook, downloadable guide)	18.52%
Podcasts	12.96%
Photos, infographics, images, or illustrations	12.96%
Customer testimonials	7.41%
Social media posts (e.g., tweet, Facebook post)	5.56%
Anything else?	5.56%

Comments:

Again, the comments related to time so the intro needs to be concise to determine if it warrants further reading/watching.

Winners:

- Shorter content
- Webinars & Videos
- Presentations
- Sales aids

Q3 - WHICH TYPE OF CONTENT ARE YOU MOST LIKELY TO BE RECEPTIVE TO READING?

Answer	%
CPD accredited articles	70.37%
Regulatory updates & commentary	66.67%
New tools and calculators available to use	53.70%
Product updates	44.44%
Business development assistance	33.33%
Survey results/research	24.07%
Information regarding forthcoming events	24.07%
Blogs	11.11%
Anything else?	7.41%

Comments:

Focussed on fund manager outlooks and factual commentary rather than personal opinion and how products and services can enhance what is offered to clients.

Winners:

- CPD content
- Regulatory comments
- Tools and calculators that can be used with clients
- Product updates

Q4 - WHICH SUBJECT MATTERS ARE YOU MOST INTERESTED IN READING ABOUT?

Answer	%
Pensions/Retirement	79.63%
Investment related	75.93%
Market commentary	50.00%
Tax/Trusts	50.00%
Psychology of investing/saving	46.30%
Protection	38.89%
Platforms	35.19%
Life Planning	33.33%
Case studies	22.22%
Equity Release	18.52%
Back Office technology	12.96%

Winners:

- Pension & Retirement content
- Investment outlook and commentary
- Tax & trust content
- Psychology of investing & saving

Q5 - ARE THE ARTICLES YOU READ IN
PANACEA BENTO BULLETIN'S EASY TO
UNDERSTAND?

Answer	%
Yes	81.48%
Sometimes	16.67%
No	1.85%

Q6 - WHAT MAKES YOU READ AN ARTICLE?

Answer	%
The headline	81.48%
The introduction	50.00%
The company name	20.37%
The image used	11.11%
Anything else?	7.41%
Don't know	1.85%

Comments:

The theme focussed on the fact that the summary/introduction needs to be concise. Additionally if the recipient had previous experience of reading good quality articles from a particular provider then there is a tendency to focus on those.

Winners:

- Strong headline
- Concise summary / intro
- Company name

Q7 - WHAT TYPE OF CONTENT WOULD YOU LIKE TO SEE PANACEA PROVIDE, THAT WE DON'T ALREADY?

Here are just a selection of the many comments that we received. Do you agree?

Answer

Key stats commentary e.g. YouGov surveys or ONS

The use of Trusts

Fund information and investment conditions, such as Yellen considered that inflation could be a threat to the future now.

Market surveys, e.g. SIPP's

More case studies

IT developments

Nothing really, I think the balance of articles are about right.

Intergenerational planning

Regularity update /company and products

You seem to cover most topics.

more on equality for genders and race

More on FCA analysis

I am mainly interested in economic updates and analysis

The future of Financial services consumer led and not the same companies trotting out their marketing stuff

More information on IHT planning issues

Nothing comes to mind - content is already pretty varied

Q7 - WHAT TYPE OF CONTENT WOULD YOU LIKE TO SEE PANACEA PROVIDE, THAT WE DON'T ALREADY?

Answer

More CPD related content

Sales ideas

None that I can think of, seems an overall good coverage.

technology items, Crypto analysis

Case studies

short out takes

more emphasise on tax saving for clients

Quiz

Links to Podcasts

You already cover most areas but more post retirement planning would help me

Care Fees Planning

Guide to taxation . In particular CGT if possible.

Info from other advisers, best practice or things that are working well, that sort of thing

SSAS related detailed case studies

Short punchy head lines and key learning / news then links to more in-depth content; videos & flyers etc

Q8 - ARE THERE ANY PROVIDER FIRMS SPECIFICALLY YOU WOULD LIKE TO SEE INCLUDED IN PANACEA?

Answer

Fidelity

Marlborough

Transact

Aberdeen

Brewin Dolphin

Parmenion

James Hay

AJ Bell

Nucleus

Brooks MacDonald

Any that are under M&A scrutiny with more updates

Q9 - HOW LIKELY ARE YOU TO RECOMMEND PANACEA COMMUNICATIONS AND CONTENT TO A COLLEAGUE?

Answer	%
Very likely / Somewhat likely	44.45%
I don't know	40.74%
Somewhat unlikely	11.11%
Very unlikely	3.7%

IMPORTANT INFORMATION

For more information visit:

www.panaceaadviser.com

www.panaceapartners.com

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