

# WHITE MARBLE

An Alpha Group Company

## 2024 Investment Marketing Content Trends



# Executive summary

Content is one of the cornerstones of effective investment marketing, but it remains a puzzle for many marketers who struggle to achieve consistent and clear results.

This is partially because content is such a broad concept. Within a firm, marketing can own everything from uploading and distributing standard investor communications to generating high-level thought leadership campaigns to publishing email newsletters and social posts. With such a broad mandate, how can investment marketers define success, let alone achieve it?

The answer will heavily depend on many factors including your firm's goals, its willingness to dedicate time and resources to content, its ability to create content that is distinct and more.

In an attempt to bring more clarity to the complicated content landscape, White Marble Consulting engaged a peer group of 14 marketing leaders and specialists at asset and wealth management firms who have responsibility for marketing content. We define marketing content as any written or multimedia content published for the primary purpose of marketing your firm's brand, products or people, not for simply communicating descriptive or regulatory information. Our findings and analysis are below.



# Key findings



More than half of respondents say they have a “somewhat formal” content strategy (57%), with regular, generic processes or frameworks, while 29% say its “very formal” and 14% say its “slightly formal.”



Respondents cite “not enough employees/bandwidth” (29%) and “not enough budget” (29%) as their primary obstacles to achieving their desired content goals.



Most respondents (50%) segment content based on content type “sometimes.” Twenty-nine percent say the “usually” do so and 21% say “always.”



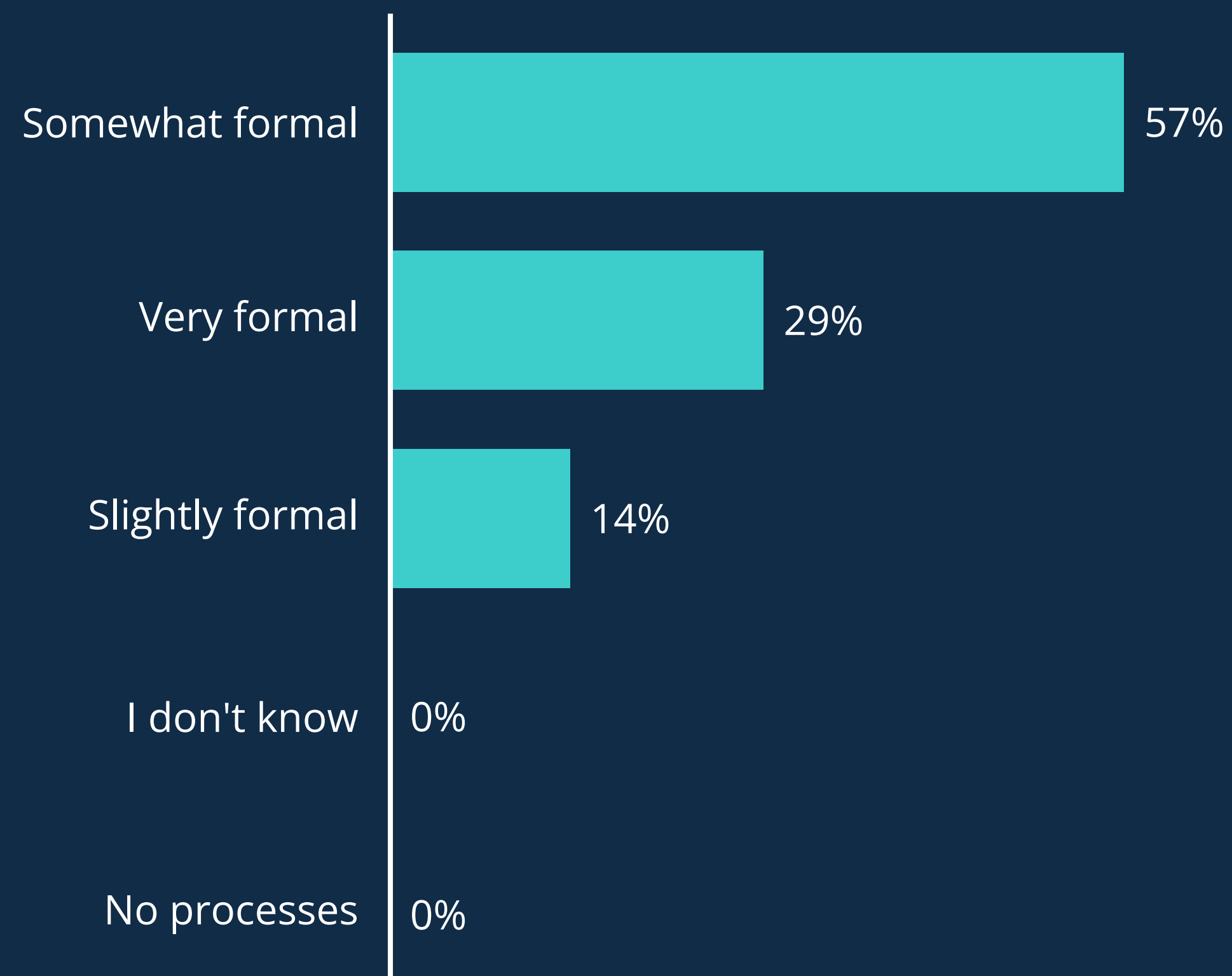
Most respondents ranked equally leads generated and website performance as the most important metrics to measuring their firm’s content success.



More than half of respondents (64%) say they collect client feedback on their content, but of this group, most only use the feedback to inform their content strategy to a small extent (56%). Only 11% of those that collect client feedback use it to inform their content strategy to a great extent.

# Most classify their content strategy as “somewhat formal”

How formal is your team’s content strategy?



There’s no one correct process for building out a content strategy. However, the more frequent and comprehensive your processes are, the more likely you are to set your efforts up for success. This is because it takes consistent, dedicated time to fulfill all the activities that can make up a truly successful content strategy:

- Auditing past content to determine gaps and opportunities
- Building out personas for target audiences, including content-specific behaviors and preferences
- Thoroughly understanding current business objectives – including sales’ needs – and mapping content solutions to them
- Creatively brainstorming new content topics and tactics
- Ensuring efficient and effective governance and compliance processes

... and more.

# Group is varied in who they say has the most influence over content

Many in the peer group say that, as marketers, they have the greatest influence over new content creation. This may depend largely on the type of content being created, though. While social posts and email newsletters often sit firmly in marketing's domain, among White Marble's client base, we've worked with several organizations in which investment teams or distribution teams hold the most influence, especially over content like insights and thought leadership.

As the experts in their topics, this makes sense. However, bringing marketing in as an equal partner in ideating and planning all marketing-specific content can ensure a more proactive, strategic approach to your content calendar – rather than a reactive, ad-hoc one based on what a team member wants to create at any one time.

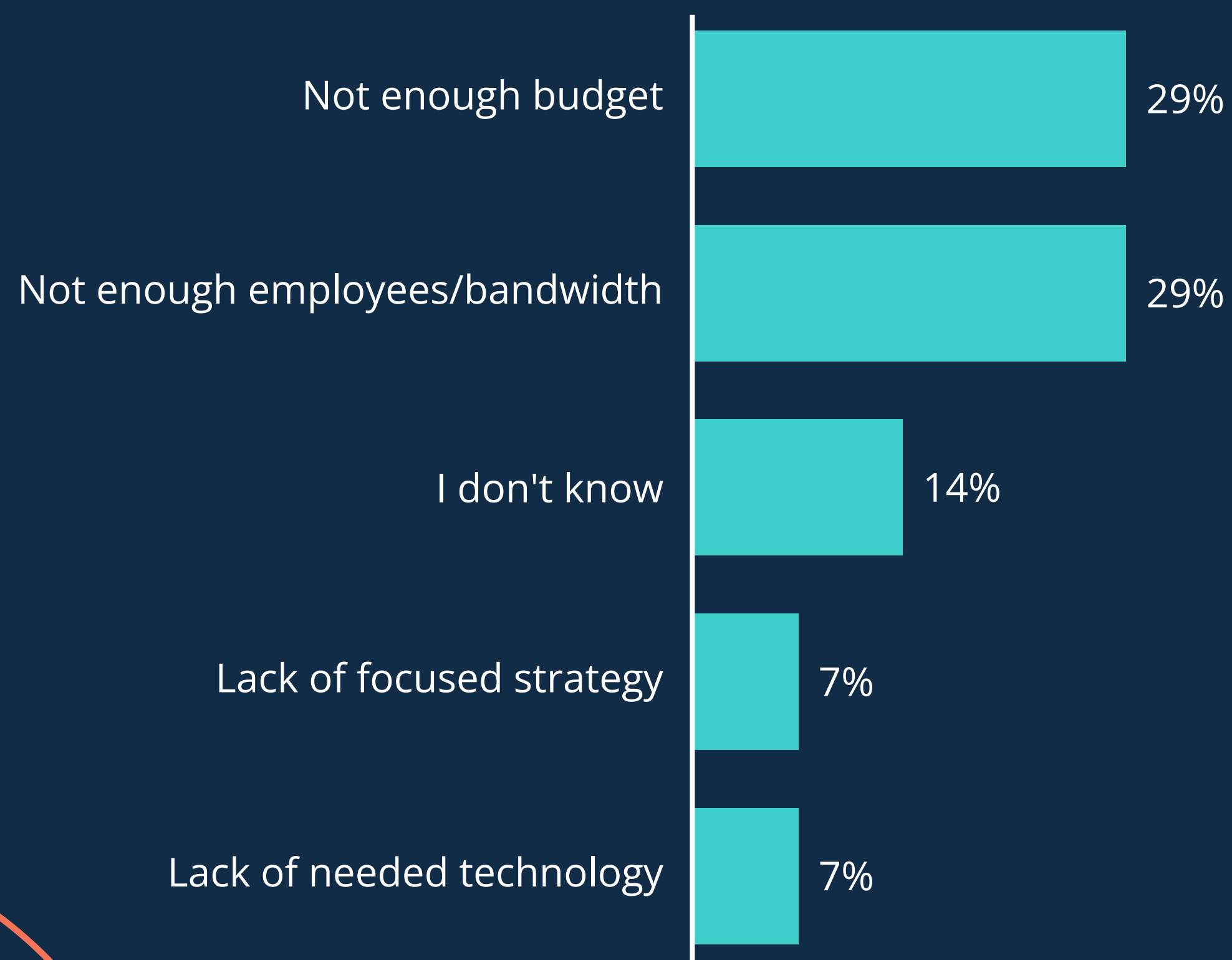
**Which teams have the most influence over deciding what marketing content your firm will produce?**

1. Marketing professionals
2. Sales/client success professionals
3. Investment professionals
4. Business/C-suite leadership

# Budget and lack of bandwidth are primary obstacles to goals

Over the past 12 months, what has been your team's primary obstacle to achieving your desired content goals?

Top five responses



Consistently generating strategic, impactful marketing content is a tough task. It's made tougher when marketers don't have all they need to succeed.

An equal number of the group ranked "not enough budget" and "not enough employees/bandwidth" as their primary obstacles to achieving desired content goals. White Marble has seen these struggles among our client base too, particularly over the past year as budgets have shrunk and headcounts have been capped or even reduced.

Overcoming these obstacles may feel completely out of your control at times. However, marketers should approach these obstacles not as a stop sign, but rather as an opportunity to think more creatively about what is possible. Encourage team members to find new efficiencies – such as repurposing content and focusing on the metrics that matter. Demonstrate clear, evidence-based success whenever you can, to build a case for greater marketing investment in the future.

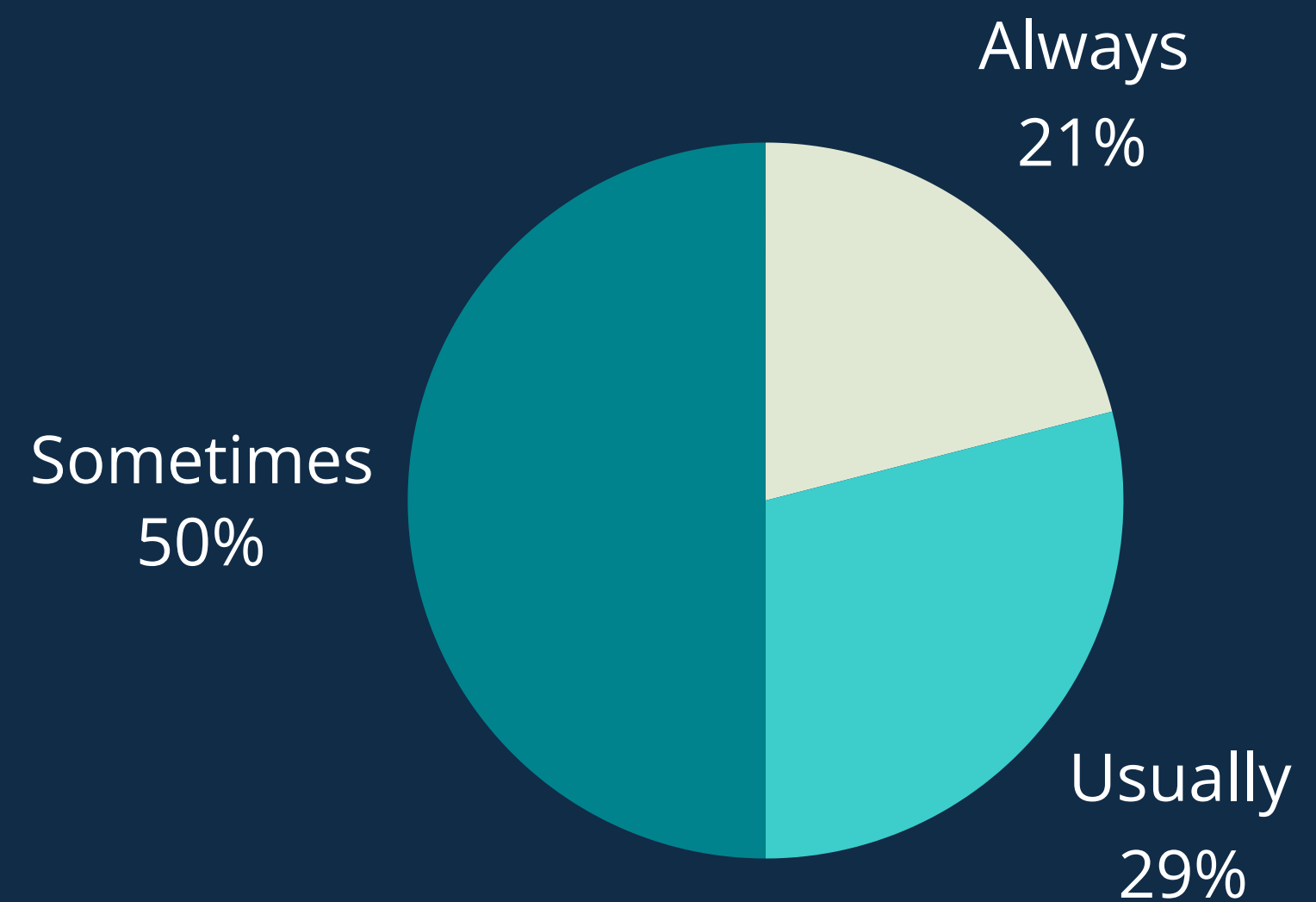
# In good news, none of the group said they never segment content for different audiences

Segmentation is becoming a more crucial ingredient to successful content marketing.

Today's audiences expect highly relevant, tailored marketing experiences when interacting with firms. We're seeing channels drift upmarket, in the sense that intermediary and even retail channels are starting to expect the personalized relationship building and client service that has typically largely been found in institutional channels. The only way to deliver this personalization and ensure content speaks well to each specific audience is to segment your audience.

Tailoring and targeting content requires significant time and investment, though. Creating multiple versions of every content piece may not be feasible or sustainable for most firms. Proactive content and distribution planning, as well as an integrated marketing organization that can work seamlessly together, are critical to providing the visibility and partnership necessary to adopt and execute greater segmentation.

**Does your team segment content based on audience type?**



*No respondents segment their content rarely or not at all.*

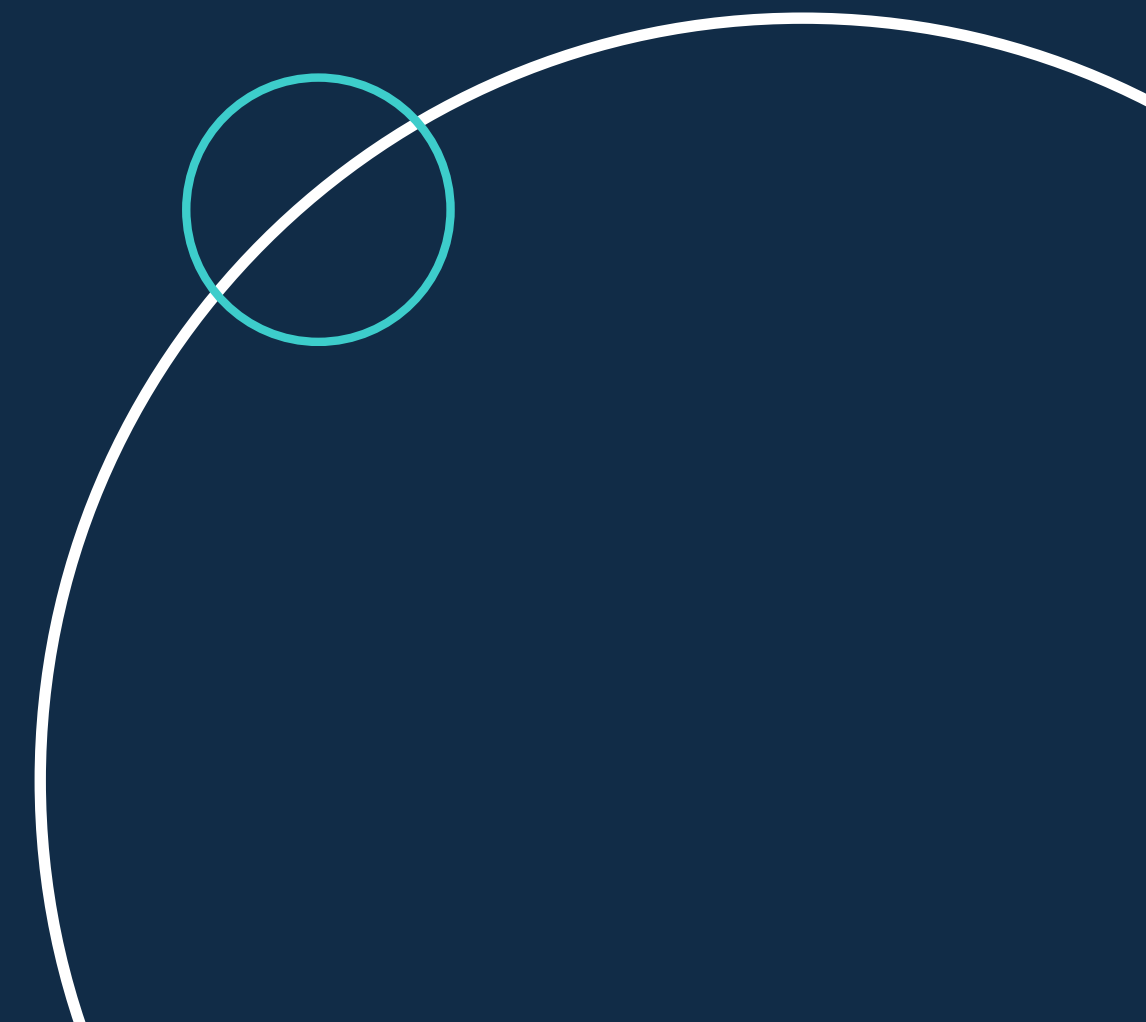
# Most perform a content audit every year

Have you ever performed an audit of your existing content and if so, how often?

7%	Every month or more
14%	Every quarter
43%	Every year
21%	Less than every year
14%	I don't know

It's hard to know what to do for the future when you don't have a clear picture of what you've done in the past. This is why a content audit is a core task for any marketing team.

A helpful content audit will look different for every firm. At the baseline, though, it should involve compiling a central list of every content piece a firm has published in a certain time period, metrics reflecting the pieces' success, and analysis of what content should be retired and what can be updated or repurposed.





# Most are collecting client feedback on content, but few use it to extensively inform their efforts

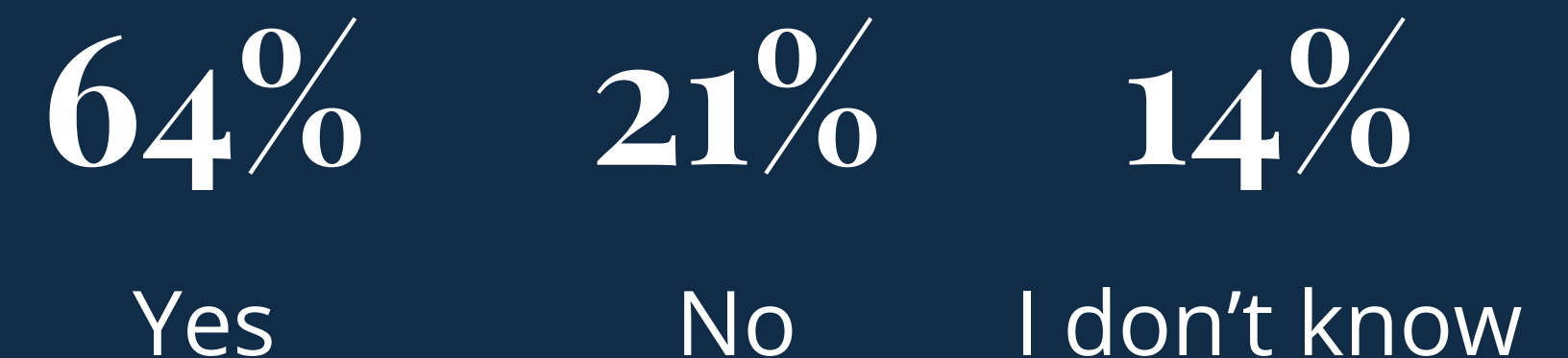
Wondering if and how your content is making an impact on your audience? One of the best ways to gain this insight is to simply ... ask your clients.

Unfortunately, though the concept is simple, collecting useful client feedback on content is an incredibly hard process to implement, scale and sustain.

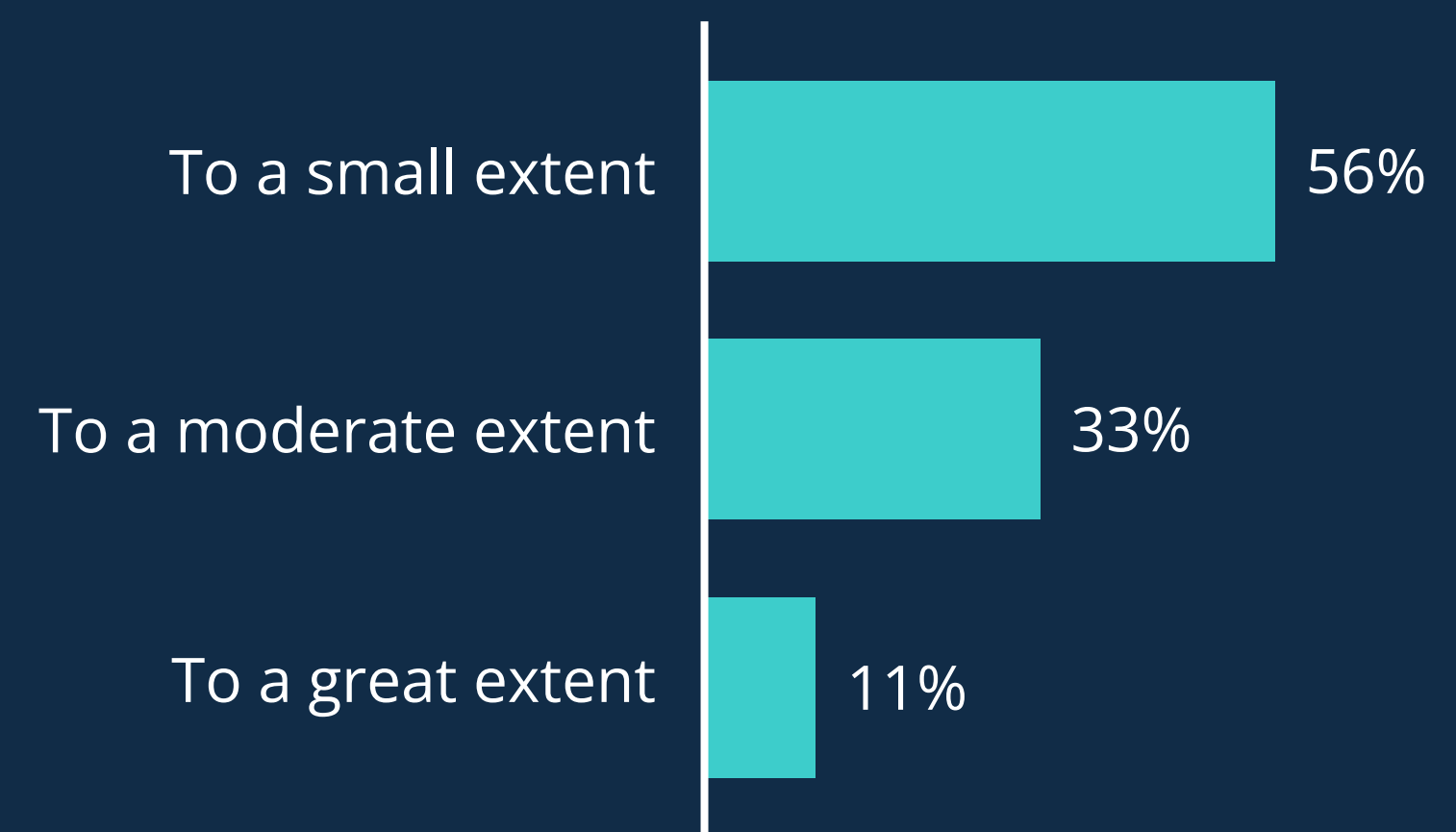
Among the peer group, most said they did collect client feedback on content. We specifically defined client feedback as qualitative input from sources like sales conversations or customer reviews, or quantitative feedback from sources like surveys.

However, most of the group that collects feedback only uses it to inform content strategy to a **small** extent. This is a missed opportunity, as that rich data, even at a small scale, can provide some of the greatest insight for improving content's success. Consider building in client feedback as a core input for your content planning process and prioritize building and maintaining those feedback loops wherever possible.

Does your firm collect client feedback on your content?



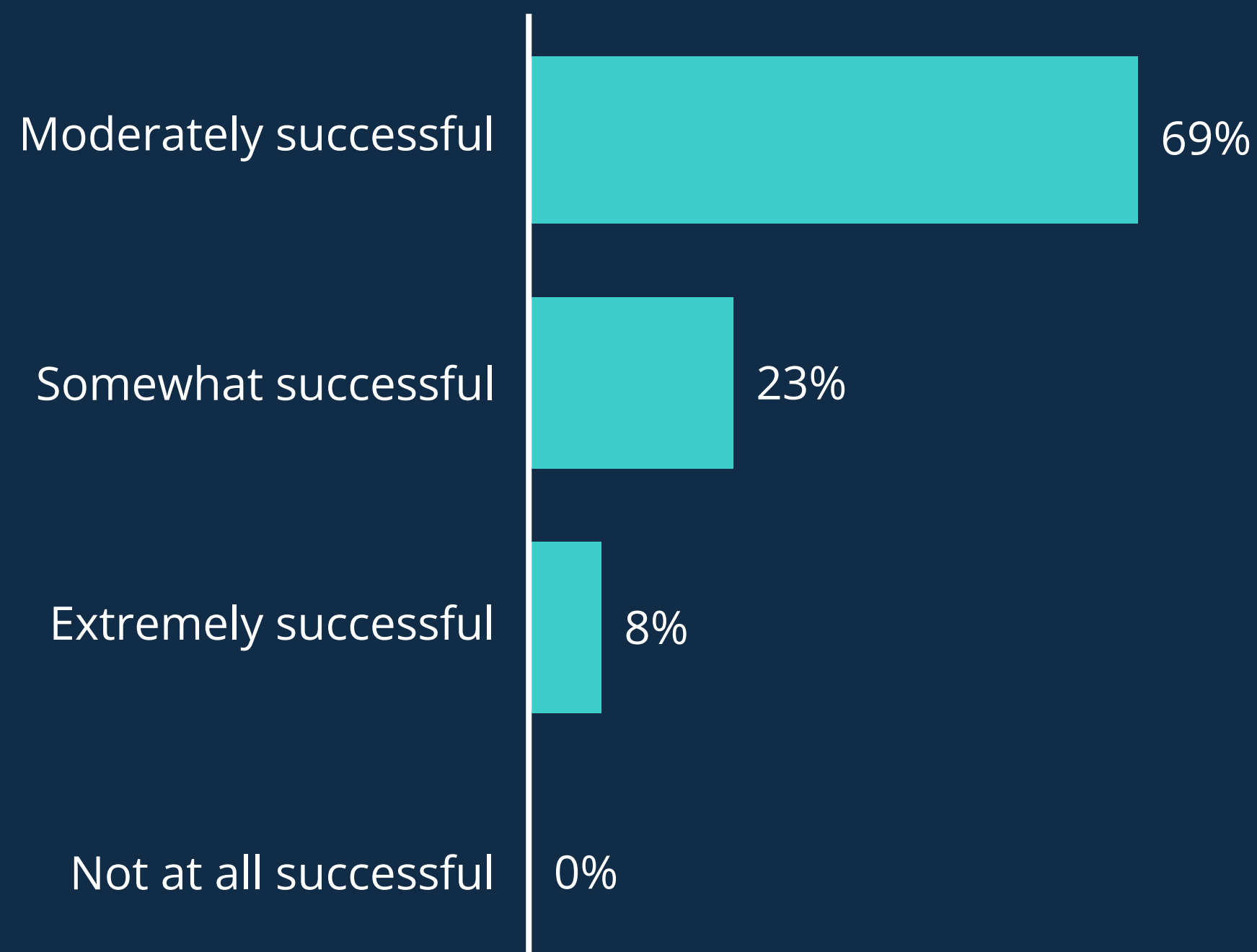
How much does your firm use client feedback to inform your content strategy?





**Most say they were moderately successful in achieving their content goals in the past year. In terms of future goals, most are looking to drive business outcomes through content.**

**Please think back to your content goals - either formal or informal - at the beginning of your last fiscal year. How successful were you in achieving those goals?**



Eighty-six percent (86%) of the peer group say their primary goal for their content over the next 12 months is to **drive business outcomes through content.**

# Most say their content operations are primarily in-house, with some outsourcing



21%

71%

7%

0%

0%

Fully in-house

Mostly in-house,  
some outsourcing

Equally in-house &  
outsourced

Mostly outsourced,  
some in-house

Fully  
outsourced

# Blogs and social posts are the content formats that performed best for the group over the past 12 months

## What formats did you publish in?



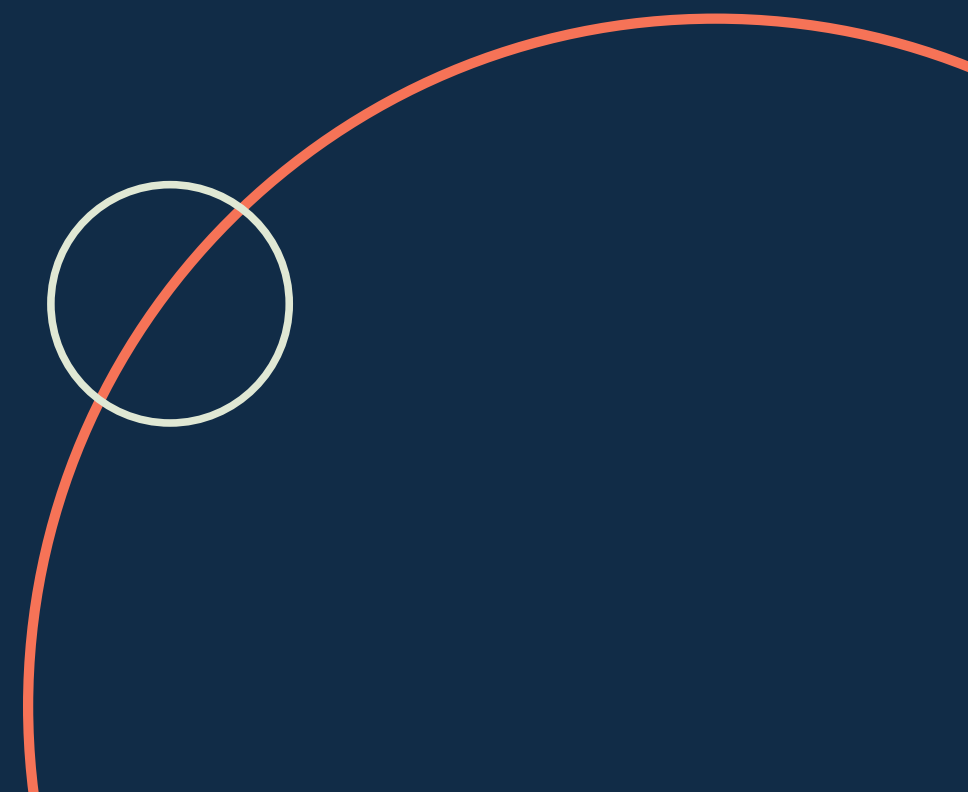
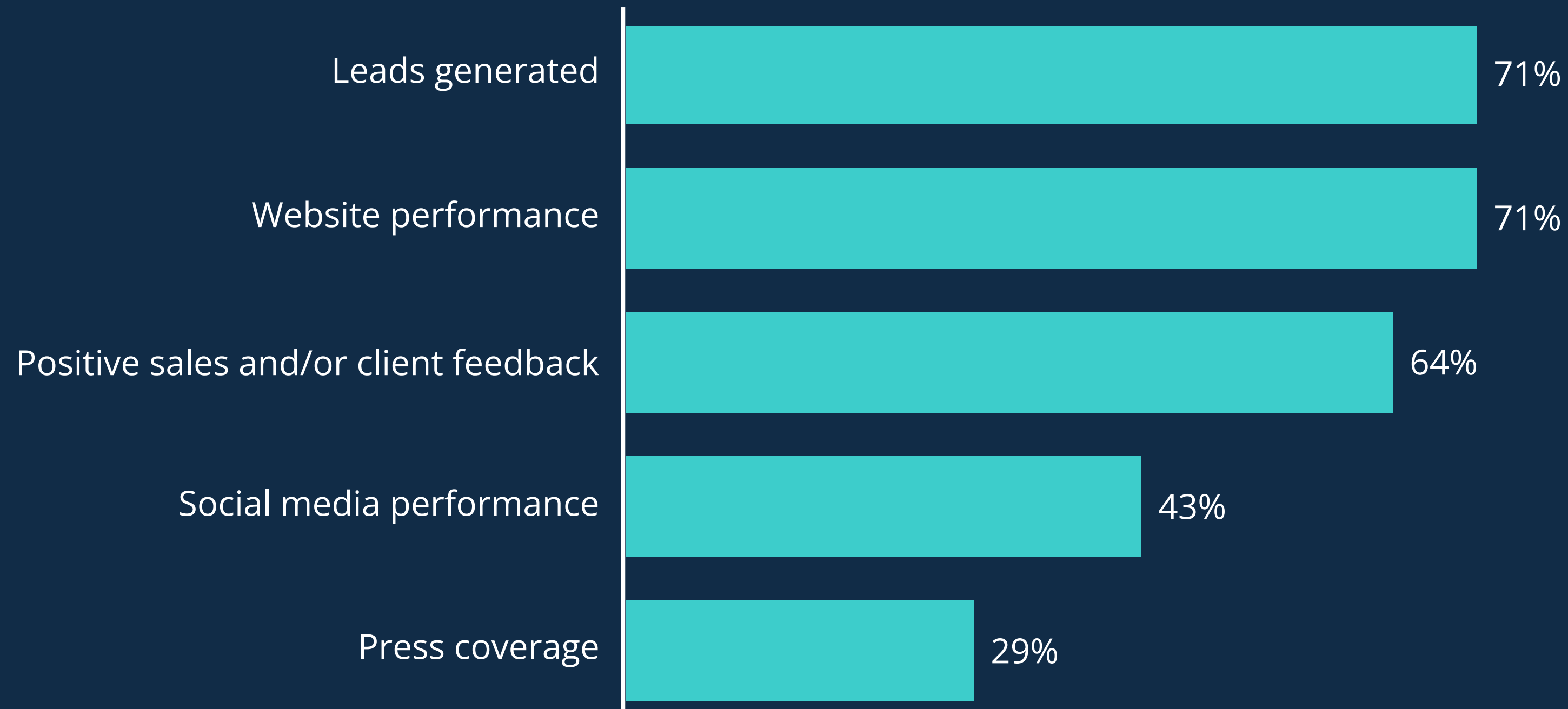
## What performed best?



# Leads generated, website performance are most important metrics to firms' content success

Which of the following metrics are most important when measuring your firm's content success?

*Select up to three*



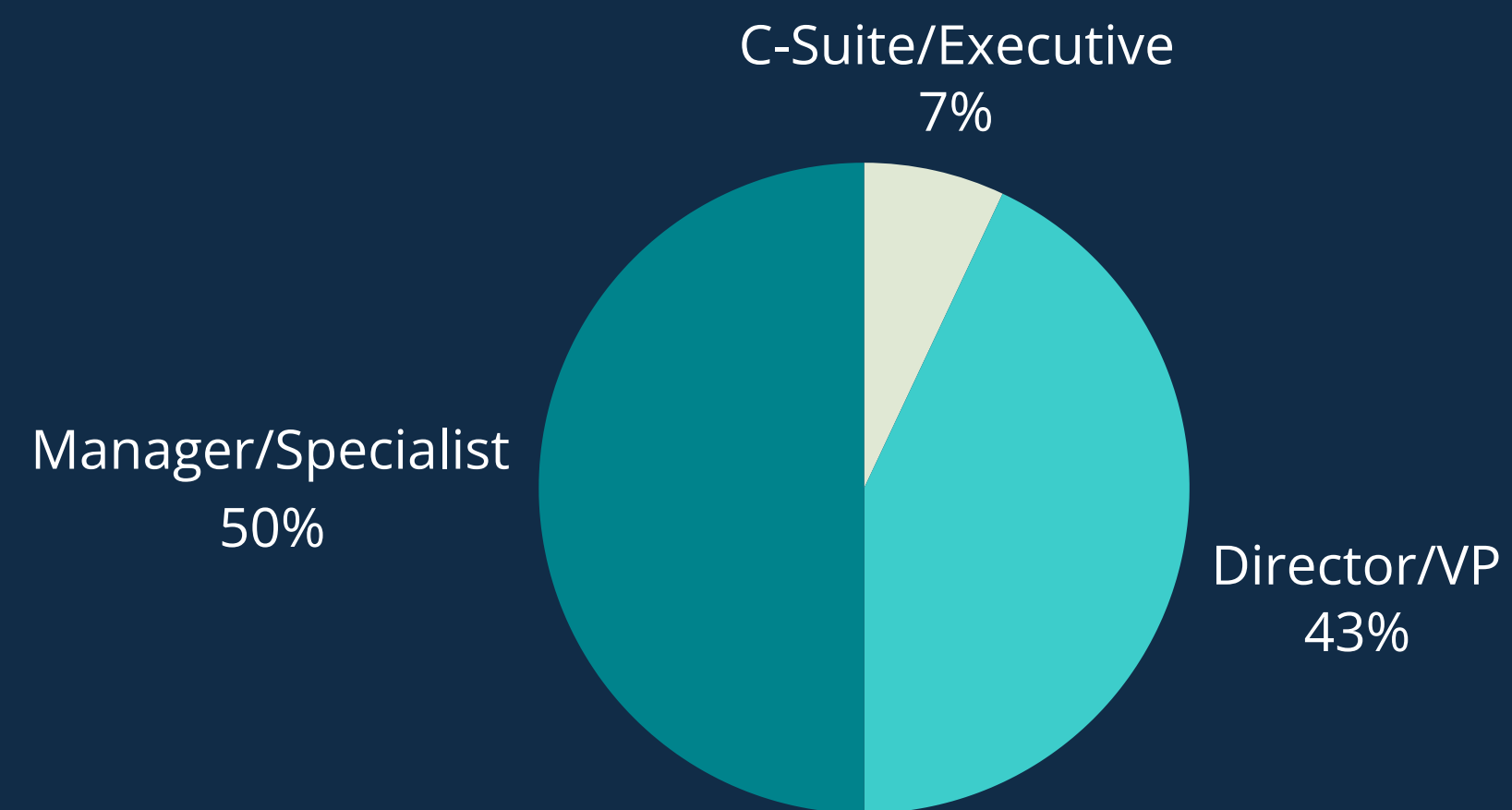
A woman with long blonde hair is sitting at a desk, writing in a notebook. She is wearing a blue top and a watch. The desk has a laptop, a pen, and some papers. The background is slightly blurred, showing a chair and a window. The overall scene is dimly lit, with a blue tint.

# About the peer group

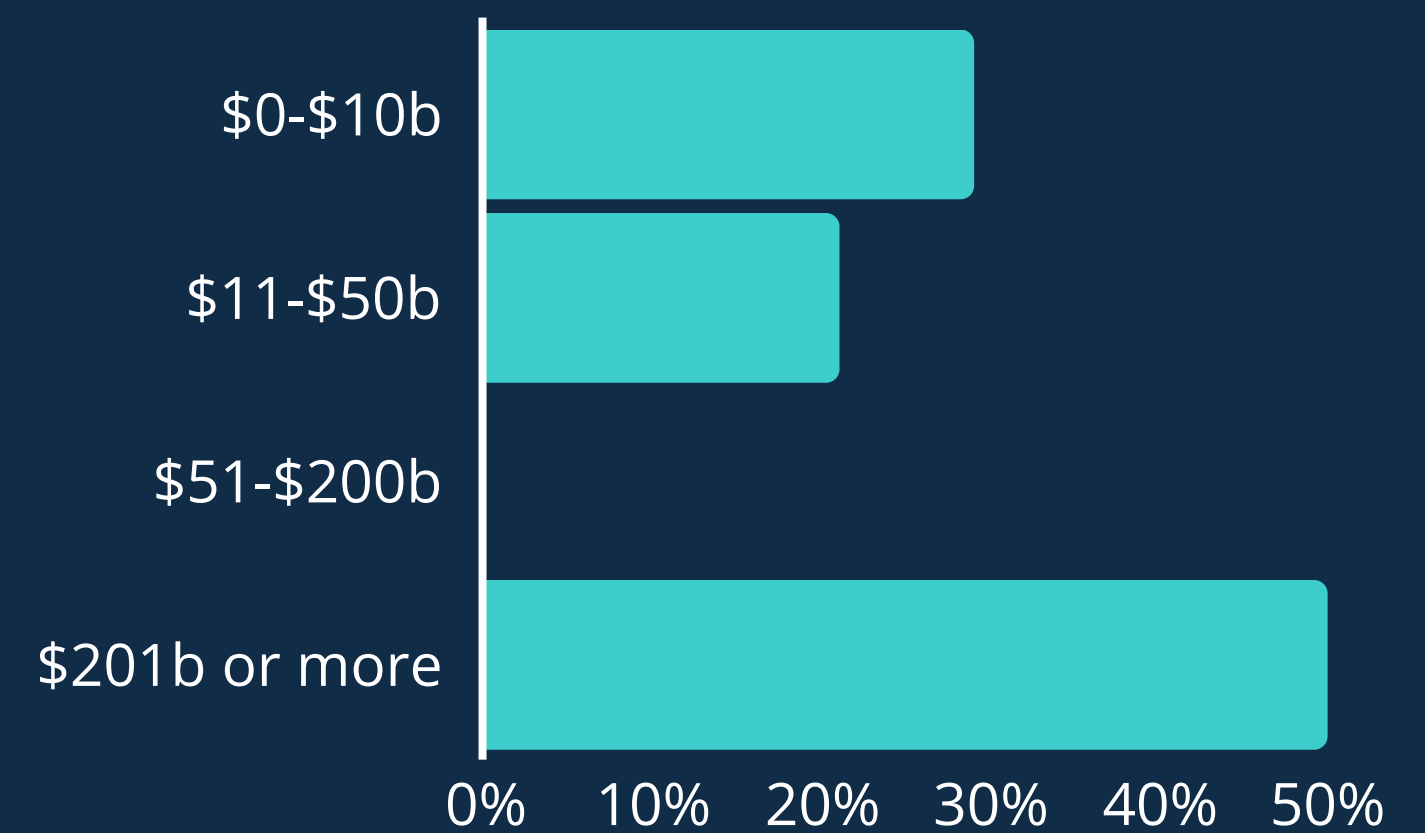


# Respondent characteristics

## Career level



## Firm AUM



Peer group consisted of 14 marketers at wealth and asset management firms in the US, UK and EU. All participants hold roles at the manager, director or C-Suite level and all have some influence over their firm's content marketing efforts.



# Our end-to-end expertise

White Marble Consulting has partnered with dozens of asset and wealth management firms to improve their content efforts and ultimately make their content work harder toward their goals.

For more information about how the team at White Marble can assist you at any stage of your content journey, please don't hesitate to get in touch via

**helloUK@whitemarbleconsulting.com** or  
**helloUS@whitemarbleconsulting.com**



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