

Guidance to reach investment trust owners

Everyone is online all the time, so we advise being where they read, inform, research and travel first

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Warhorse thanks AIC friends, Research in Finance, Ptarmigan Media, Capital City Media, YouGov and media owners for analytics to help explain the sector readership.

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Warhorse media mix methodologies to reach investment trust audiences



Owned media

Thought leadership, events, marketing collateral, product documentation, website and database emails



Earned media

Press, Broadcast interviews, Social media coverage



Hired media

Fund specific campaigns

Manager investment trust brand ads and promotion

Content placement, Native, Contextual, Programmatic, Paid-for research

Controlled, manager resource dependent, limited audience vertical, lower reach

Third party opinion, variable exposure, less predictable outcome, no editorial control

Controlled, predictable, broader reach, but third party paid-for cost

Complied promotion [FCA PERG 8.6 rules]

- In-house manager databases
- S793 offline mailing lists
- RD:IR professionals database
- RD:IR D2C database
- "Subscribe here" database
- Manager LinkedIn page
- Trust specific website
- Manager podcasts
- Manager webinars
- Email templates
- Landing pages/ email template

Statutory [FCA PERG 8.1 rules]

- RNS
- LSE
- Annual and interims
- Announcements
- AGMs

National press Trade press

- Financial Times
- Daily Telegraph
- Sunday Telegraph
- Times
- Sunday Times
- Daily Mail
- Mail on Sunday
- Guardian
- Observer
- Financial Adviser
- Investment Week
- Money Management
- Money Marketing
- Portfolio Adviser
- Professional Adviser
- Asset TV

Consumer press

- City AM
- Investors Chronicle
- MoneyWeek
- Shares magazine
- This is Money
- What Investment

Online

- Interactive Investor
- Hargreaves Lansdown
- Citywire / Investment Trust Insider
- Trustnet (FE fundinfo)
- FT Adviser
- This is Money
- Which Investment Trust

Others/ freelancers

- AIC
- McHattie Group newsletter
- Regional and Scottish press

Scheduled

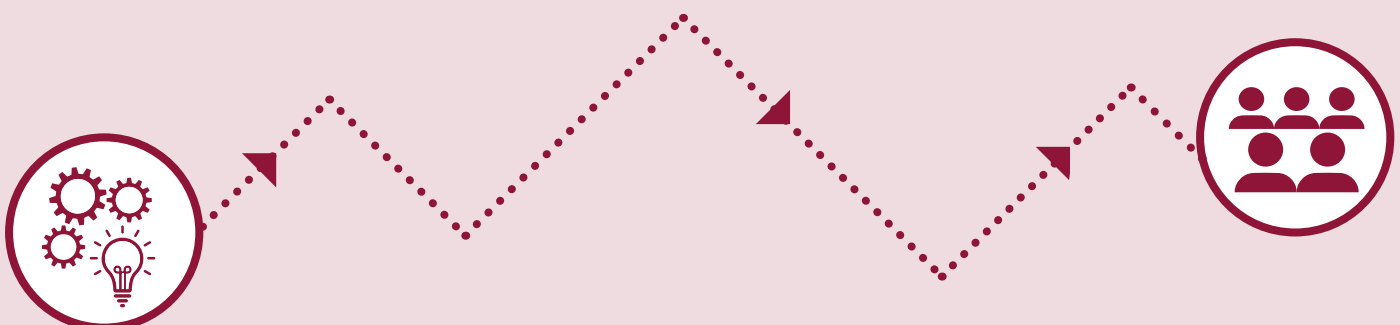
- National press
- Monthly investment magazines
- Consumer magazines
- Dianomi IT readers media list
- Citywire Goldmine
- Asset TV
- Edison, Kepler, Marten & Co

Email and CPC

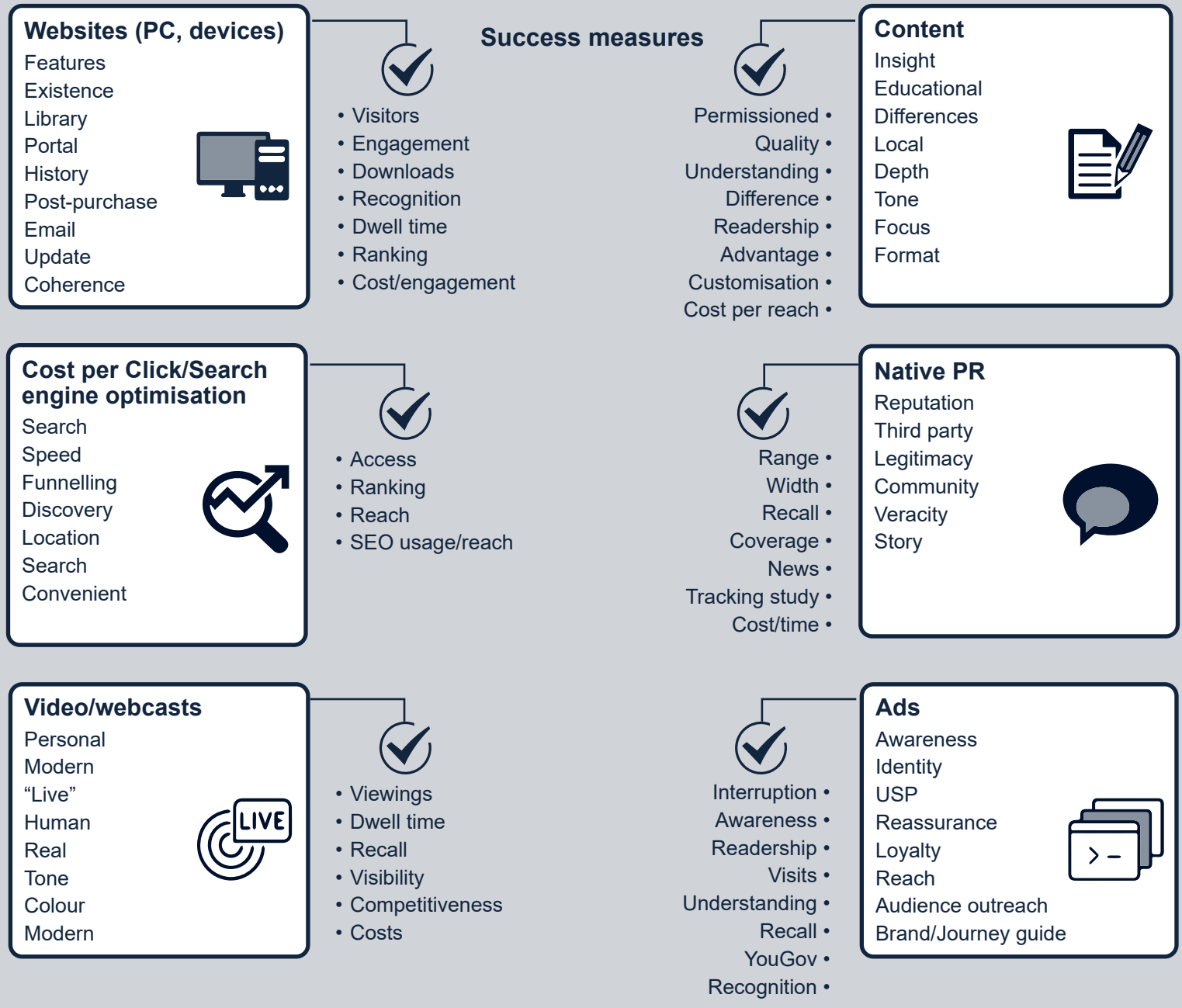
- Citywire
- Trustnet (FE fundinfo)
- MoneyWeek
- Dianomi
- What Investment
- City AM
- Investors Chronicle
- MoneyWeek
- Shares
- This is Money

Online

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- Which Investment Trust
- MarketViews
- AJ Bell



Range of emerging media, old and new and their features



Investor Journeys



Traditional media revisited

Scaling the UK readership by investment trust owners. There were 600,925 investors in 2015.

804,329

Total investors for investment trusts 2021

1.5%

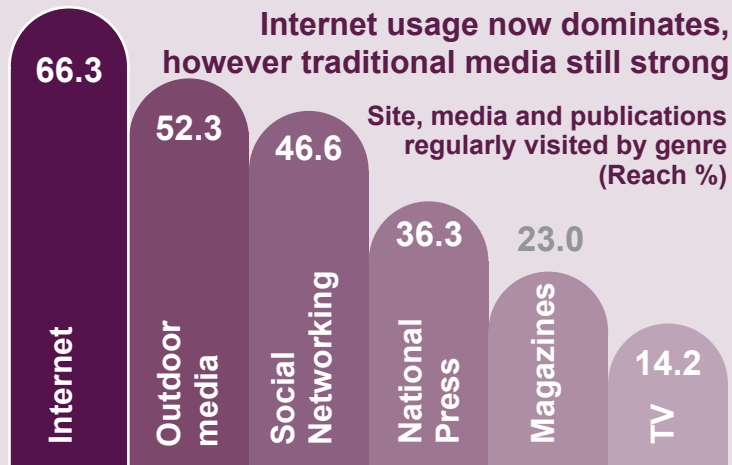
Of UK adults are investment trust holders

100,000

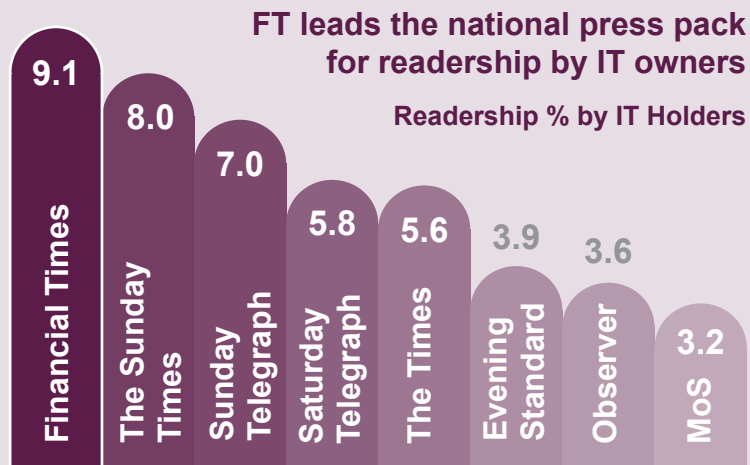
May be active in any one year

5.6%

Of investment trust owners read The Times



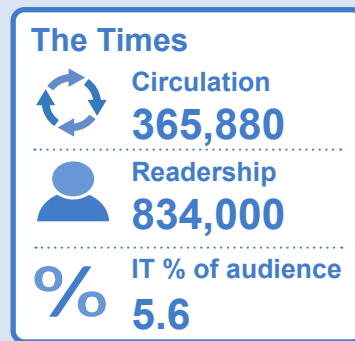
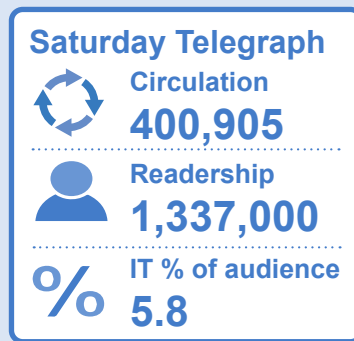
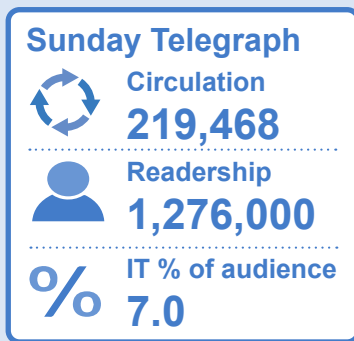
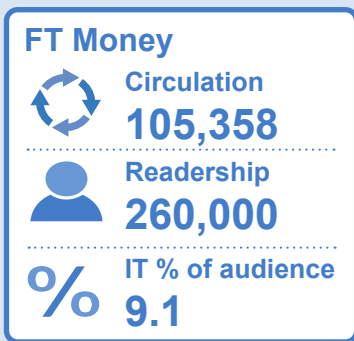
YouGov/Ptarmigan Media, percentage use by investment trust owners, medium usage, Jan 2021



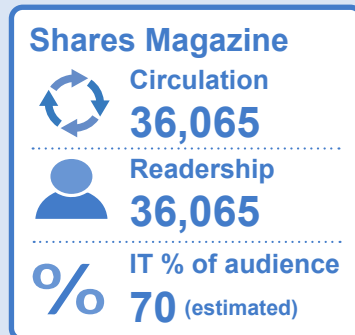
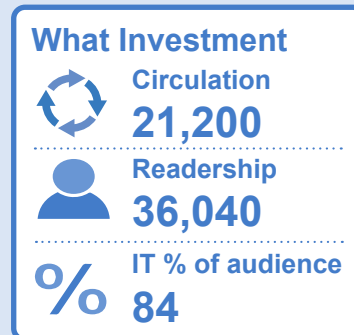
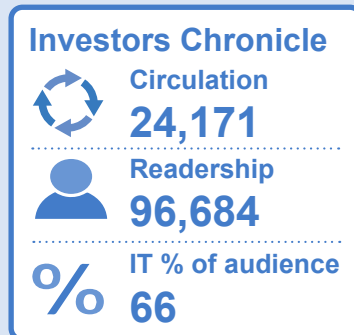
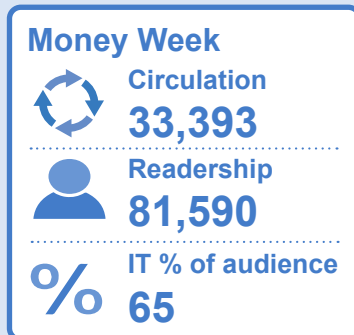
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Simplified media readership: investment trust owners

Nationals



Magazines



Email subscribers

Email remains a valuable way to reach D2C investors



UK investment trust owners: demographics in context

~ 200k

More investors than 2018

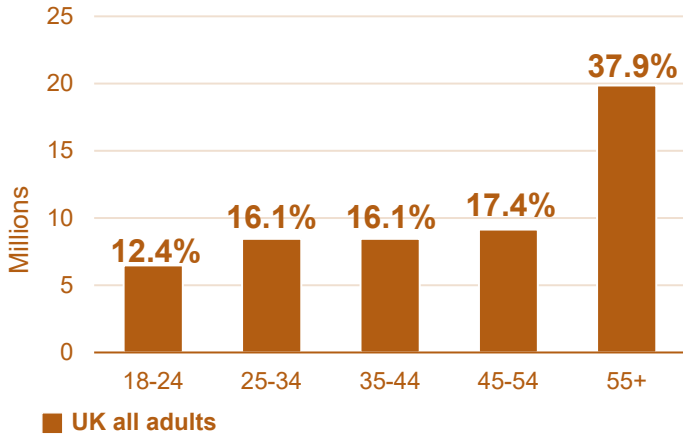
55+

Fastest growing age group

1.5%

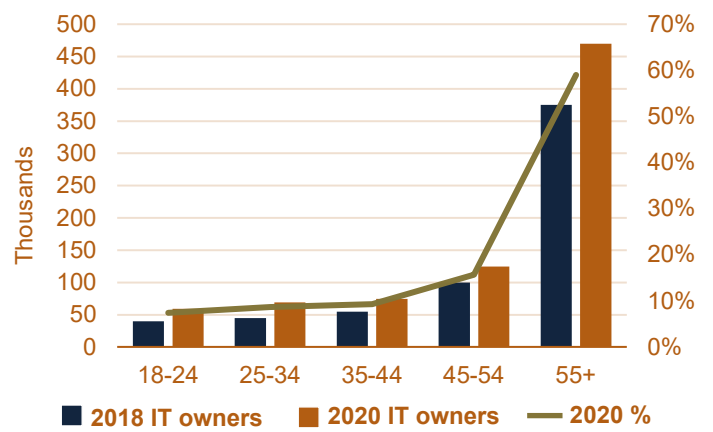
Of UK adults own investment trusts which reflect wealth dispersal in the UK as a developed nation and ageing society.

UK has an ageing population: over half over 45



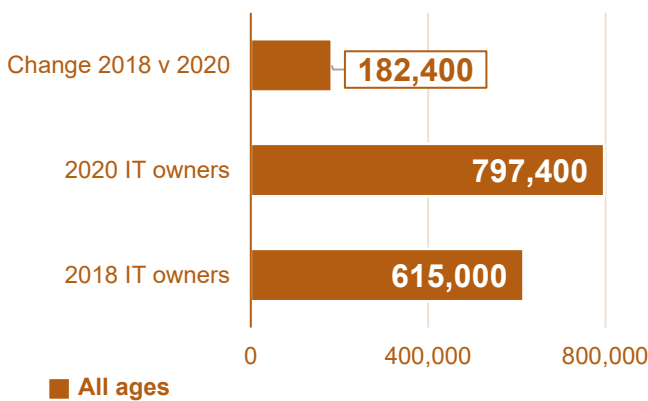
Source: YouGov 2021.

Investment Trust age owners profile



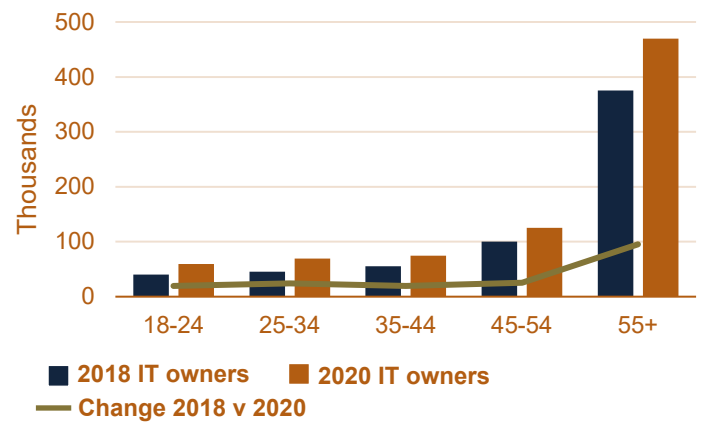
Source: YouGov 2021.

Investment Trust ownership change: All ages



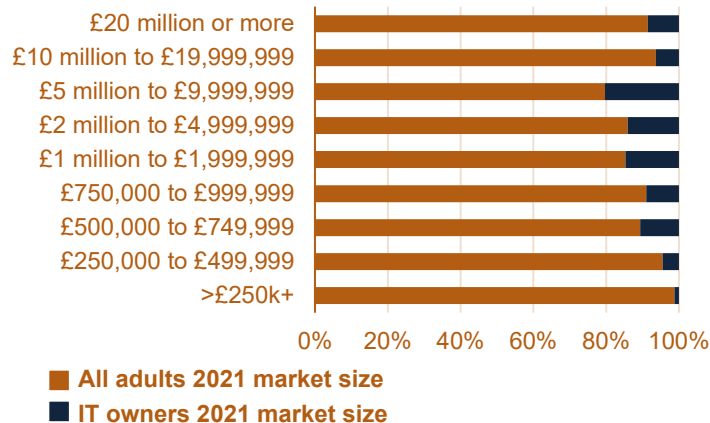
Source: YouGov 2021.

Over 55s the largest growing IT owner age group



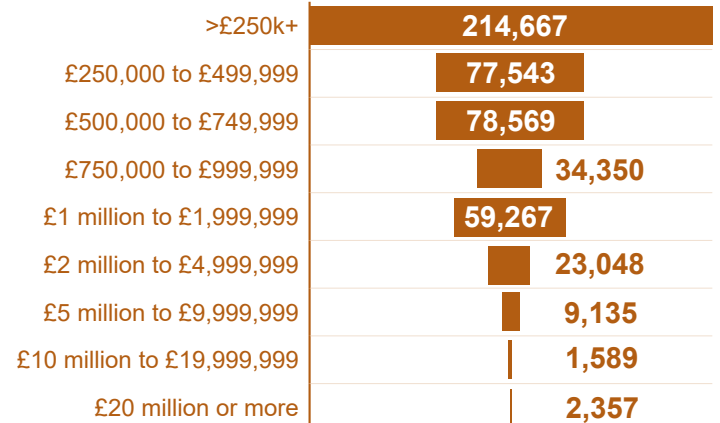
Source: YouGov 2021.

Adults' wealth bands v IT owners



Source: YouGov 2021.

Wealth dispersal 2021 by asset bands IT owners



Source: YouGov 2021.

Starting points for research are broad, not just platforms

