

Panacea Adviser



Bento Bulletin Analysis Report from 2017

January 2018



Hallmark of Innovation
Financial Innovation Awards
Finalist - 2016

Introduction

Panacea Adviser is a unique, community based, marketing engagement platform. It helps engage Financial Advisers and Paraplanners with Product Providers, acts as an independent communication conduit and provides new business leads, which ultimately results in recommendations to support improved consumer outcomes.

We send out our 'Bento' email bulletin to our community of c.16,000 Financial Advisers and Paraplanners between 2-3 times per week and each bulletin contains between 7-10 articles.

In 2017 we sent out 134 bento bulletins to 2.15m bento bulletins. Stats are as follows:

- ✓ average open rate of 13.5%
- ✓ the highest open rate for a single issue was 17%
- ✓ average click through rate of 5%
- ✓ the highest click through rate for a single issues was 10.4%

It is important to note that open rates stated within this document are minimum open rates, as our system is only able to track individuals that have actually opened our emails in full and not just read using the preview panel.

This high level of engagement has consequently allowed us to generate particularly interesting insights into how the UK adviser market is currently using email marketing, what they are receptive to and enable us to assess the opportunities available to gain competitive advantage.

This analysis covers Bento email bulletins sent from January to December 2017 and provide a breakdown of what works and where patterns emerge.

I hope you find it of interest. If you have any questions about this report or require any additional information please don't hesitate to contact me.

Sarah Paul
Marketing Director, Panacea Adviser

Bento analysis by month

By Month	Bentos per month	Delivered	Opens	O/R %	Clicks	CTR %
January	10	174,908	25,796	14.75	1,142	4.43
February	10	189,506	27,894	14.72	1,512	5.42
March	14	240,899	34,967	14.52	1,843	5.27
April	9	151,892	20,582	13.55	889	4.32
May	12	207,128	27,982	14.55	1,253	5.32
June	13	218,952	28,719	13.03	1,525	5.32
July	9	139,143	17,523	12.59	1,093	6.24
August	11	171,077	22,607	13.21	1,253	5.54
Sept	13	183,917	22,864	12.43	999	4.37
October	12	169,316	20,805	12.29	1,014	4.87
Nov	10	144,456	18,601	12.88	719	3.87
Dec	10	174,908	25,796	14.75	1,142	4.43

	Bentos Sent	Delivered	Opens	O/R %	Clicks	CTR %
Total	123	1,991,194	268,340	13.48	13,242	4.93
Per month Averages	10.25	165,933	22,362	13.48	1,104	4.93

Bulletin Send Summary

In terms of campaign planning for the future it may be useful to bare in mind the below, as a result of the analysis undertaken on previous pages..

Top 3 months by open:

- March
- June
- May

Top 3 months by open rate:

- Jan
- February
- March

Top 3 months by Clicks:

- March
- June
- February

Top 3 months by CTR:

- August
- September
- July

Observations

- ✓ March appears on the top three of three of the lists so would class this as our most successful month. February and June follow on from this.
- ✓ Looking at the open rate it doesn't look like the frequency of bulletins sent impacts the number of times it is open as there appears to be no set pattern correlating sends with opens or clicks.
- ✓ Whilst August didn't, as you would expect, get a high number of opens it did get an excellent click through rate. This would suggest that the advisers that read the bulletin had more time to peruse the articles within it and in fact two of the top ten most read articles of the year were actually published in August.

Subject matters of interest

In 2017, partners sent us on average 29 articles each throughout the year. This means that partners are submitting an article into a bento on average once a month. Overall in 2017 we sent out:

- ✓ 134 bento bulletins
- ✓ which included 895 partner articles
- ✓ Which received 18,245 click throughs
- ✓ Articles were allocated with 56 different subject matters (categories).

Note: Articles can be allocated with more than one category.

We have reviewed articles placed on the site and in the Bento bulletins in 2017 to get an idea of the subject matters that are provided most regularly, and what gets the best click through rate.

Across the year the following types of articles have been submitted to the bento bulletin most frequently:

Order	Category	Article Count	% of total articles
1	Investments	490	29%
2	Investment Commentary	249	15%
3	Protection	106	6%
4	DFM	74	4%
5	Tax, Trust & ISA	60	4%
6	Business Development	59	4%
7	Pensions	59	4%
8	Partner Events	53	3%
9	Retirement	39	2%
10	Partner Lead Story	38	2%

Subjects with best CTR

The below table shows those subject matters with the best click through rates in 2017.

Order	Category	Article Count	Clicks	CTR
1	DFM	74	1273	5.81
2	Partner Offers	24	444	5.41
3	CPD	22	413	5.33
4	Protection	106	2090	5.07
5	Partner Videos	35	691	5.07
6	Investments	490	9904	4.95
7	Investment Commentary	249	5165	4.82
8	Partner Events	53	1195	4.44
9	Partner Webcasts	37	839	4.41
10	Pensions	59	1455	4.05

Top 20 most clicked Partner articles in 2017 - Overall

Date	Company	Article
21/03/17	Just	How safe is 4% withdrawal rate - compare with personalised underwriting
01/12/17	Prudential	How do you solve a problem like nearing the Lifetime Allowance?
15/08/17	Foot Anstey	Leaving. And you are starting your own business?
03/03/17	Scottish Widows	Nothing is more certain than death, taxes and eye watering probate charges
10/04/17	M&G Investments	Win a pair of tickets to the RHS Chelsea Flower Show with M&G
30/05/17	Foot Anstey	FCA clarity will help advice move forward
31/01/17	Prudential	Planning Matters: A family of case studies
29/08/17	Aviva Investors	Consumer debt: tipping point?
14/07/17	Just	Finding retirement a bit scrambled up?
26/05/17	Prudential	Time to talk 'Retirement Plans'
03/04/17	Prudential	Addressing key regulatory concerns for advisers
21/06/17	Rathbones	My kingdom for a horse
27/11/17	Rathbones	What's your inflation rate? Try Rathbones personal inflation calculator
25/09/17	Royal London	Risk targeted governed retirement income portfolios prove their resilience at five-year anniversary
04/07/17	Aviva Investors	Euan Munro's thoughts on the asset management industry and global markets
04/09/17	Invesco Perpetual	Investment Intelligence Seminars Round 3 2017
27/02/17	FundsNetwork	Tax year end: FundsNetwork's Pension and ISA application deadlines
26/07/17	Prudential	Sustainable help in a diligent world
27/06/17	Royal London	Multi Asset Webinar - Trevor Greetham discusses Governed Range
19/07/17	Rathbones	Be a ScamSmart investor

Most clicked investment articles in 2017

Company	Article
M&G Investments	Win a pair of tickets to the RHS Chelsea Flower Show with M&G
Aviva Investors	Consumer debt: tipping point?
Rathbones	My kingdom for a horse
Royal London	Risk targeted governed retirement income portfolios prove their resilience at five-year anniversary
Aviva Investors	Euan Munro's thoughts on the asset management industry and global markets
Invesco Perpetual	Investment Intelligence Seminars Round 3 2017
Royal London	Multi Asset Webinar - Trevor Greetham discusses Governed Range
Rathbones	Be a ScamSmart investor
Aviva Investors	European property: Ageing gracefully?
BlackRock	BlackRock's Global Investment Outlook for Q4

Most clicked pensions & retirement articles in 2017

Company	Article
Just	How safe is 4% withdrawal rate - compare with personalised underwriting
Prudential	How do you solve a problem like nearing the Lifetime Allowance?
Just	Finding retirement a bit scrambled up?
Prudential	Time to talk 'Retirement Plans'
Rathbones	What's your inflation rate? Try Rathbones personal inflation calculator
Royal London	Risk targeted governed retirement income portfolios prove their resilience at five-year anniversary
FundsNetwork	Tax year end: FundsNetwork's Pension and ISA application deadlines
Prudential	Sustainable help in a diligent world
Aviva	Are pensions moving into the digital age?
Just	Rethinking retirement together - Financial Adviser Service Awards 2017

Most clicked protection articles in 2017

Company	Article
Scottish Widows	Clinical study highlights savings worries risk to mental health
VitalityLife	Make the most of the New Year with Business Protection
Royal London	Mental health in the mainstream
Aviva	New ALPS Business Tracking - case notifications email communication
VitalityLife	Consultant Select with VitalityHealth
Aviva	Aviva's upgraded CI benefit - Providing that extra peace of mind
Royal London	Affordable Income Protection
Royal London	Bespoke marketing material
Aviva	Facts and figures - Start engaging your clients with IP now
VitalityLife	VitalityLife's unique underwriting service

Most clicked tax, trust & ISA articles in 2017

Company	Article
Prudential	How do you solve a problem like nearing the Lifetime Allowance?
Scottish Widows	Nothing is more certain than death, taxes and eye watering probate charges
Prudential	Planning Matters: A family of case studies
FundsNetwork	Tax year end: FundsNetwork's Pension and ISA application deadlines
Prudential	Making things simpler with Prudential's improved Trust and Application Form Tool
Prudential	Calculation of IHT in relation to pensions and Staveley
Prudential	Planning now for the residence nil rate band
Prudential	Trust planning webex reminder
Prudential	Excluded Property Trusts
Utmost Wealth Solutions	Utmost Wealth Solutions expands portfolio

Contact us!



Derek Bradley
Founder & CEO



07595 892930



derekbradley@panaceaadviser.com



Sarah Paul
Marketing Director



07725 482150



sarahpaul@panaceaadviser.com



James Bradley
Communications Director



07540 061950



jamesbradley@panaceaadviser.com



Hannah Hutcheon
Communications & Marketing Consultant



07710 514967



hannahhutcheon@PanaceaAdviser.com

Important Information

This document is private and confidential and may contain privileged material. You must not copy, distribute, disclose or use any of the information within it.

Any data contained herein is the property of Panacea Adviser and provided “as is”. It is not warranted to be accurate, complete or timely.

Panacea Adviser (Panacea) is a trading name of **GRANTMELL LIMITED** incorporated and registered in the UK with company number 05688007 whose registered office is at St Ann’s Wharf, 112 Quayside, Newcastle Upon Tyne, NE99 1SB

www.panaceaadviser.com

www.panaceapartners.co.uk

© 2018 Panacea Adviser, images reproduced under license.