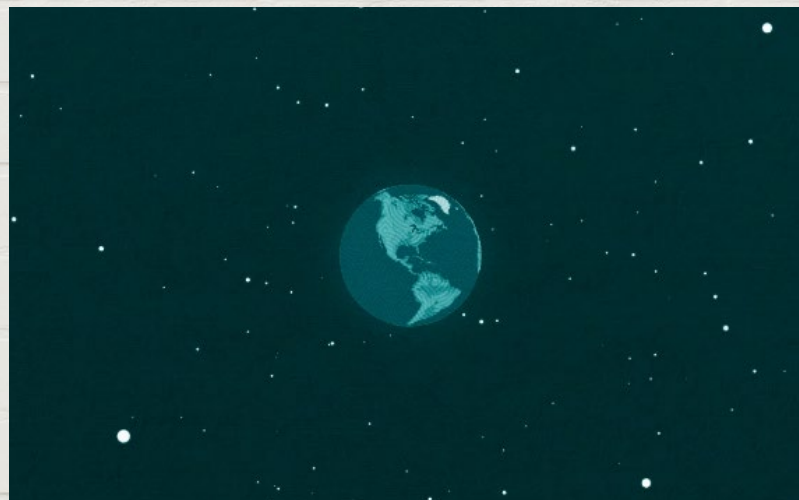


# BIG SENSE IN SUSTAINABILITY



HOW ALLIANCE TRUST INVESTMENTS 'TEN GOOD REASONS' CAMPAIGN  
HELPED FINANCIAL ADVISERS TO SEE THE SENSE IN SUSTAINABILITY

## EXECUTIVE SUMMARY

In 2015 Q4 Alliance Trust Investments, working with Tangible, set out to promote their range of Sustainable Future funds to intermediaries and financial advisers.

Despite all the historic evidence showing a rapid pace of change in technology and societies, when it comes to investment, the dominant thinking is that things will stay as they are forever.

This misplaced belief in the permanence of the present is hard-wired into human thinking, from an investment perspective anyway. But it is a trait that is unhelpful when trying to decide which companies will be tomorrow's winners. To be successful we need to identify and understand the long-term trends that are changing the global investment landscape and creating significant growth opportunities.

Our Sustainable Future Funds are built on this belief and we needed a campaign that could challenge preconceptions and correct misplaced beliefs. It would have to tackle myths head on and surprise and disrupt the marketplace.

The resulting **"Ten Good Reasons"** campaign did all this and more.

### Results were spectacular

Tracking from the online campaign proves that it really engaged the audience, and there were hugely impressive uplifts in sales throughout the three month campaign.






## BACKGROUND

### Why there's financial sense in sustainability

There are lots of good reasons why now is a good time to consider a more sustainable investment strategy.

At Alliance Trust Investments we understand that the future doesn't just happen. It is driven by the power of investment. We believe that more sustainable businesses are better placed to grow faster than the market and it makes financial sense to invest in companies that are developing the technologies and infrastructure that support a more prosperous and resilient future.

We are one of the largest sustainable investors in the UK with over £5bn of assets under management (as at 31/12/15). We have a range of ten sustainable funds, including five risk profiled funds.



Sustainable businesses  
are likely  
to grow faster

## THE CHALLENGE

### Tackling a widespread and misplaced belief in the “permanence of the present”

Research revealed that the task could be a complex one. It was clear that we were dealing with an intermediary audience that held strongly entrenched attitudes.

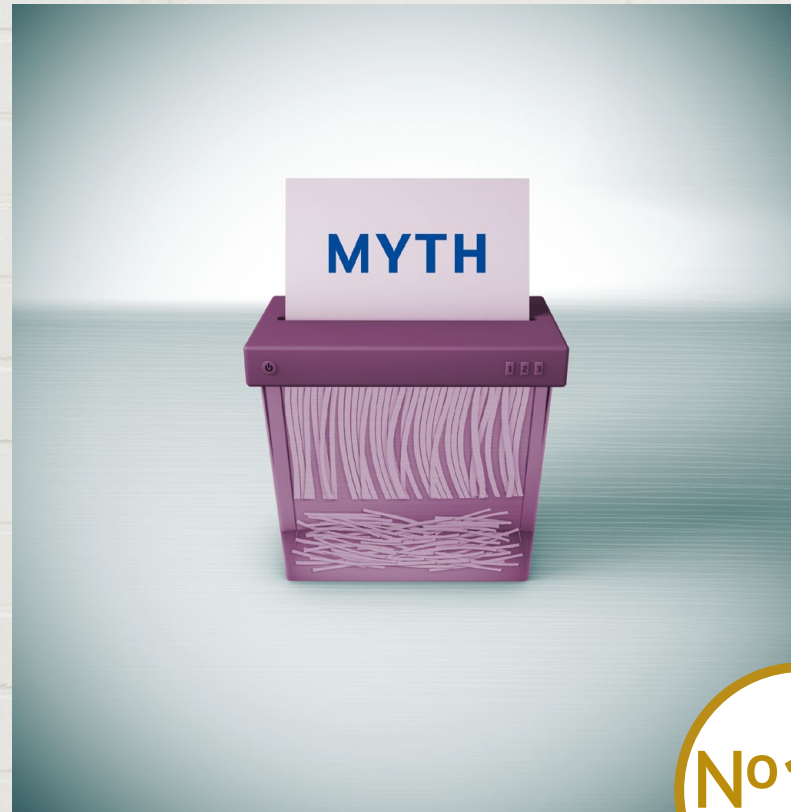
Often in the investment industry people believe that what worked in the past will continue to work in the future.

Thus tobacco companies command valuations implying they will exist forever; oil companies trade as if fossil fuels will continue to provide four-fifths of our primary energy for centuries; and banks will act as if irresponsible behaviour is a fact of life.

Peter Michaelis, Head of Investment at Alliance Trust Investments refers to this attitude as a “misplaced belief in the permanence of the present”.

Therefore the campaign brief was to challenge preconceptions, fuel debate, surprise and ultimately re-educate our audience.

It was to challenge existing ways of thinking and put sustainability onto the agenda.





## THE STRATEGIC SOLUTION

### Ten Good Reasons to invest sustainably

We knew that our audience was diverse and would have a range of preconceptions. Different advisers would have different prejudices and different reasons for their scepticism about sustainable funds.

No one reason or argument could convince them all. To stir debate and change attitudes we needed to introduce a range of talking points. To challenge differing preconceptions we needed to tackle a variety of myths head on.

It was from this thinking that the “**Ten Good Reasons**” campaign emerged.

Ten compelling reasons were chosen to dispel myths, educate the under-informed, and promote the Alliance Trust Fund Range as part of the process.

Each reason needed to be hard-hitting to capture attention, and be succinct enough to be understood across multiple marketing channels and social platforms.

### THE TEN GOOD REASONS ARE:

- |                                                                                       |                                                                                      |
|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| Nº 1 Sustainable investing is now growing at a faster pace than traditional investing | Nº 6 If you keep looking back you'll only see diminishing returns                    |
| Nº 2 Most UK investors want a sustainable option                                      | Nº 7 Investments that cause pollution could cost your clients money                  |
| Nº 3 High net worth investors are shifting to sustainable investing                   | Nº 8 80% of CEOs see sustainability as a way to gain competitive advantage           |
| Nº 4 Being in tune with sustainability helps us deliver a stronger performance        | Nº 9 Our 5 risk rated funds make it easier to pick the right sustainable investments |
| Nº 5 Our sustainable funds have outperformed the market over 1, 3 & 5 years           | Nº 10 We shred the myth that SRI funds cost more to manage                           |

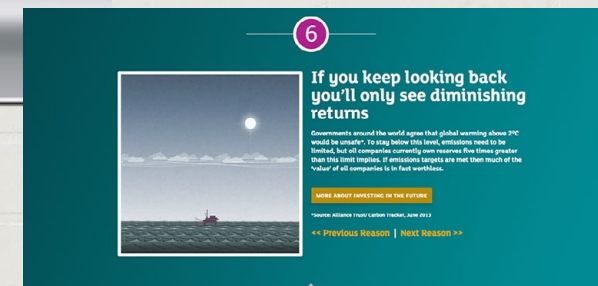
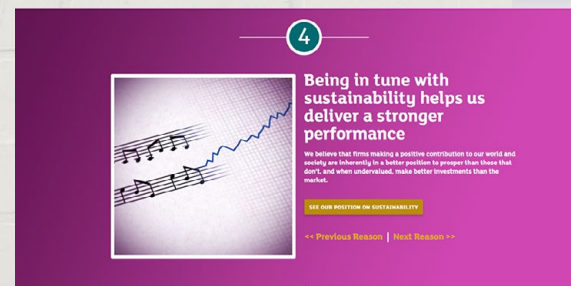
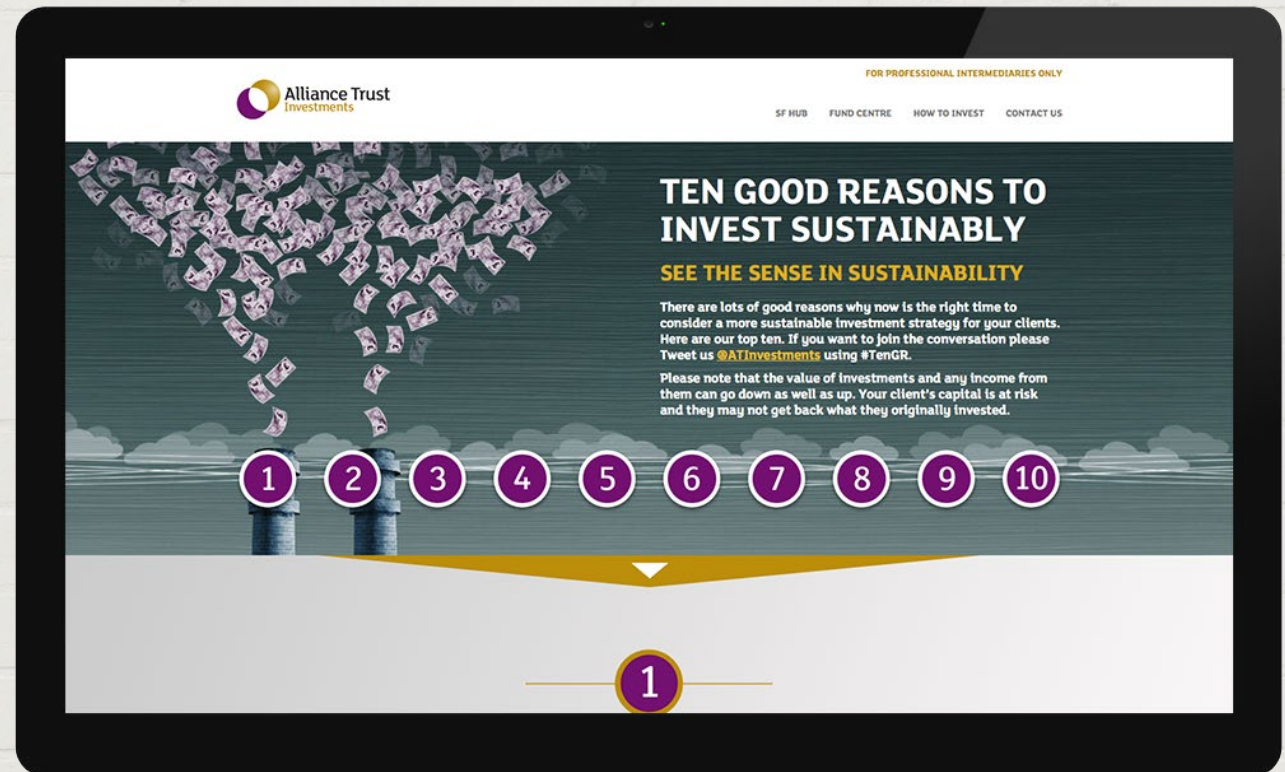
## THE CAMPAIGN IN ACTION

- Campaign microsite
- Digital advertising
- The Sense in Sustainability film
- Social media
- Content distribution
- Email
- Press

### Campaign microsite

We created a microsite for the campaign with all ten good reasons listed and explained, and with links through to the Sustainable Future Hub, the Fund information centre and literature guides and brochures.

<http://www.ten-good-reasons.co.uk/>





## Digital Advertising

Each ad featured an individual one of our ten reasons, but also had a call to action to discover all ten, which were displayed on our microsite – so that every exposure to the campaign promoted the full content.

Here's a small selection of our digital display ads:

<http://goo.gl/d3AZaR>

<http://goo.gl/gwJTjD>

<http://goo.gl/eTfklr>

Username – **Star Awards**

Password – **10goodreasons**



Nº 2

Nº 2. Most UK investors want a sustainable option\*

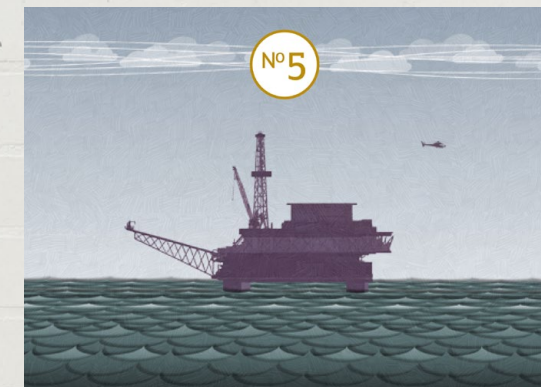
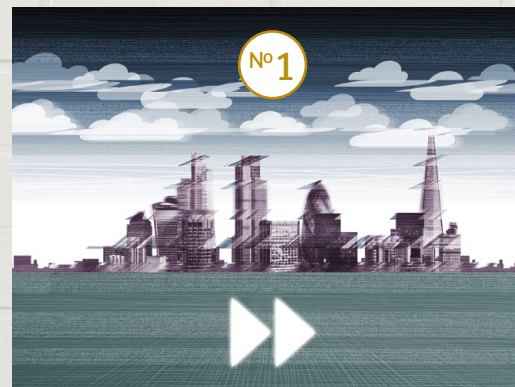
\*Source: YouGov 2013 survey for National Ethical Investment Week

**Risk Warnings**

For investment professionals only. This advert should not be communicated to, or relied on by, retail investors. Please note that the value of investments and any income from them can go down as well as up. Your client's capital is at risk and they may not get back what they originally invested.

**Alliance Trust Investments**

See the sense in sustainability



### The Sense in Sustainability film

We also created a two minute 3-D animated film, which explained our overall approach to sustainable investing. This sat on the home page of our website and was used at events.

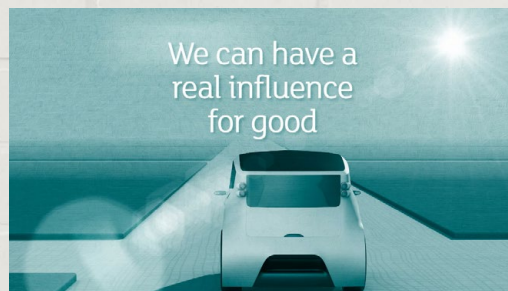
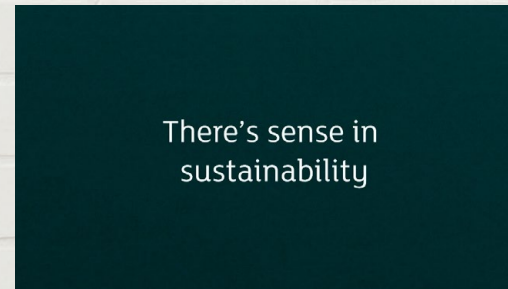
Here's a link to view the film:

<https://vimeo.com/120366759>

Pass: **trust01**



A change is  
happening across  
the world





## Social Media

Regular tweets promoted the ten reasons and linked through to further information.

### Content Distribution

We supported the campaign by writing and promoting relevant sustainability themed articles on sites that targeted financial advisers. The articles covered topics around different investment themes that we have been researching and information about the fund range, including performance.

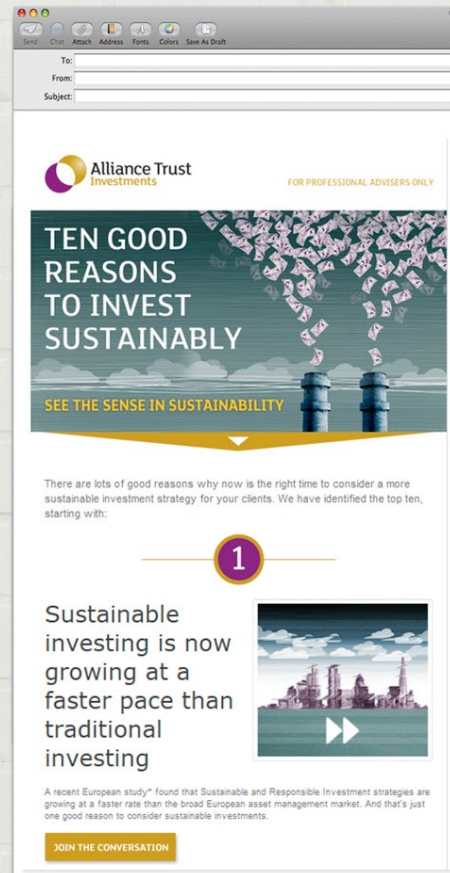


## Email

We sent 10 different emails to an audience of 7,521 financial advisers on a weekly basis, each focussing on one of the ten good reasons, and inviting recipients to view the full information on the microsite.

## Press

In the interest of environmental sustainability we decided to only run four printed press adverts.



**Alliance Trust Investments** FOR PROFESSIONAL ADVISERS ONLY

# TEN GOOD REASONS TO INVEST SUSTAINABLY

SEE THE SENSE IN SUSTAINABILITY

There are lots of good reasons why now is the right time to consider a more sustainable investment strategy for your clients. We have identified the top ten, starting with:

- 1** Sustainable investing is now growing at a faster pace than traditional investing

A recent European study\* found that Sustainable and Responsible Investment strategies are growing at a faster rate than the broad European asset management market. And that's just one good reason to consider sustainable investments.

[JOIN THE CONVERSATION](#)



## Nº1. Sustainable investing is now growing at a faster pace than traditional investing

A recent European study\* found that Sustainable and Responsible Investment strategies are growing at a faster rate than the broad European asset management market. And that's just one good reason to consider sustainable investments. You'll find more at [ten-good-reasons.co.uk](#)

**Discover ten good reasons to invest sustainably**

**Visit: [ten-good-reasons.co.uk](#)**  
**Call: 0808 234 1888**  
**#TenGR**

**Alliance Trust Investments**

\*Source: Eurofil European SRI Study 2014

**Risk Warnings**  
For professional advisers only. Please note that the value of investments and any income from them can go down as well as up. Your client's capital is at risk and they may not get back what they originally invested.

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## CAMPAIGN RESULTS

### Online Advertising Results

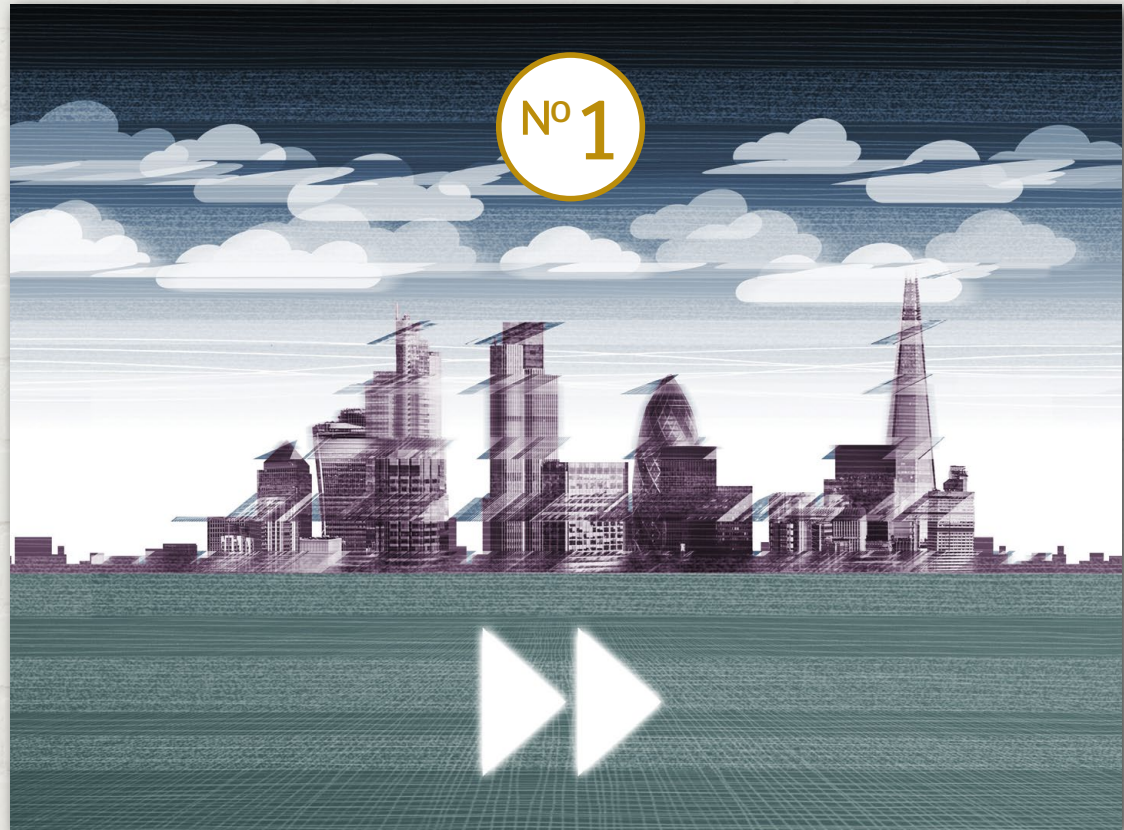
Ptarmigan Media are specialists in the investment sector and provide a range of industry benchmarks for marketing to financial advisers. These provided a key basis for campaign evaluation.

- Online advertising ran for a period of 6 weeks, and recorded 3,004 clicks from 746,118 impressions. This gives an **overall CTR of 0.46%** – well above the industry category benchmark of 0.11%.
- The overall CPC has finished at £14.63 – compared to an industry category benchmark of £40.
- The percentage of impressions resulting in a user hovering on an ad was 23.82%, which was more than double the category benchmark of 9.9%.
- The percentage of impressions where a user entered the frame of an ad and remained active for at least 0.5 seconds was 8.38%, which was 3 times more than the industry category benchmark target of 2.8%. So users were shown to be engaged.
- Of those who hovered over an ad, 35.16% interacted. Well over the category benchmark of 28.3%.

### Email results

Average email open rate of 16% – compared to a 3.3% industry average\*.

\*2014 Silverpop email marketing metrics benchmark study.





## SALES RESULTS

Of course various different factors can affect sales, particularly product changes and charges. However, despite minimal product changes between Q4 2014 and Q4 2015, we saw a dramatic uplift in sales within the campaign period.

The campaign started in mid-late October, building into the heaviest activity (which incl. press) through November and then tailed off in December in the build up to Christmas. Although actual sales figures are confidential, year-on-year (YOY) sales comparisons reveals the campaign effectiveness and pattern of media spend – with October up 78% YOY, December up 352% YOY and the focal period of November up a massive 4782% YOY.

The ten good reasons campaign did indeed show that there is indeed big sense in sustainability.



**TEN GOOD REASONS TO INVEST SUSTAINABLY**

**SEE THE SENSE IN SUSTAINABILITY**

There are lots of good reasons why now is the right time to consider a more sustainable investment strategy for your clients. Here are our top ten. If you want to join the conversation please Tweet us @ATInvestments using #TenGR.

Please note that the value of investments and any income from them can go down as well as up. Your client's capital is at risk and they may not get back what they originally invested.

1 2 3 4 5 6 7 8 9 10