

January 1 2022 - October 26 2022

**Instagram High-Net-Worth Investment &
Professional Services Content Opportunity
Analysis™ Q4 2022**

Financial Services

INSTAGRAM

Content Opportunity Methodology



1

Measure & Categorize

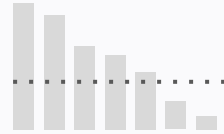
Sample a large number of social posts to find ones that are significantly outperforming the average.



2

Identify Top Themes

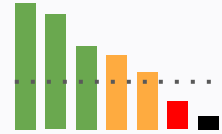
Identify the themes that are resonating most with the audience by sorting the themes by their aggregated performance metrics.



3

Identify a Benchmark

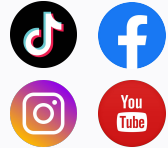
Identify content themes that are performing above and under an average benchmark for the industry based on views & engagements.



4

Identify Opportunities

Look at the data and find the content themes that are resonating with the audience based on a set of top creators.



5

Repeat For Each Platform

Repeat the analysis for every platform that matters to your brand and audience to find platform-specific opportunities.

Data is collected via our principle data partners, a variety of additional tools, and our own manual observation techniques.

Principle Data Partners



Key Takeaways

Top content opportunities in Q4 2022 for Financial High-Net-Worth Audience on Instagram include:

Market Updates:

- **Financial Market News & Advice:** Informing viewers on the recent news about the state of the economy and providing financial market predictions.

About Us:

- **How the Firm Operates:** Providing clarity and insight on the firm's operational processes and how they take care of their clients.


Quick Financial Tips:

- **Helpful Educational Topics:** Quick and easy to understand videos that ask the viewers' relevant questions while providing educational answers to the topic.

Quotes:

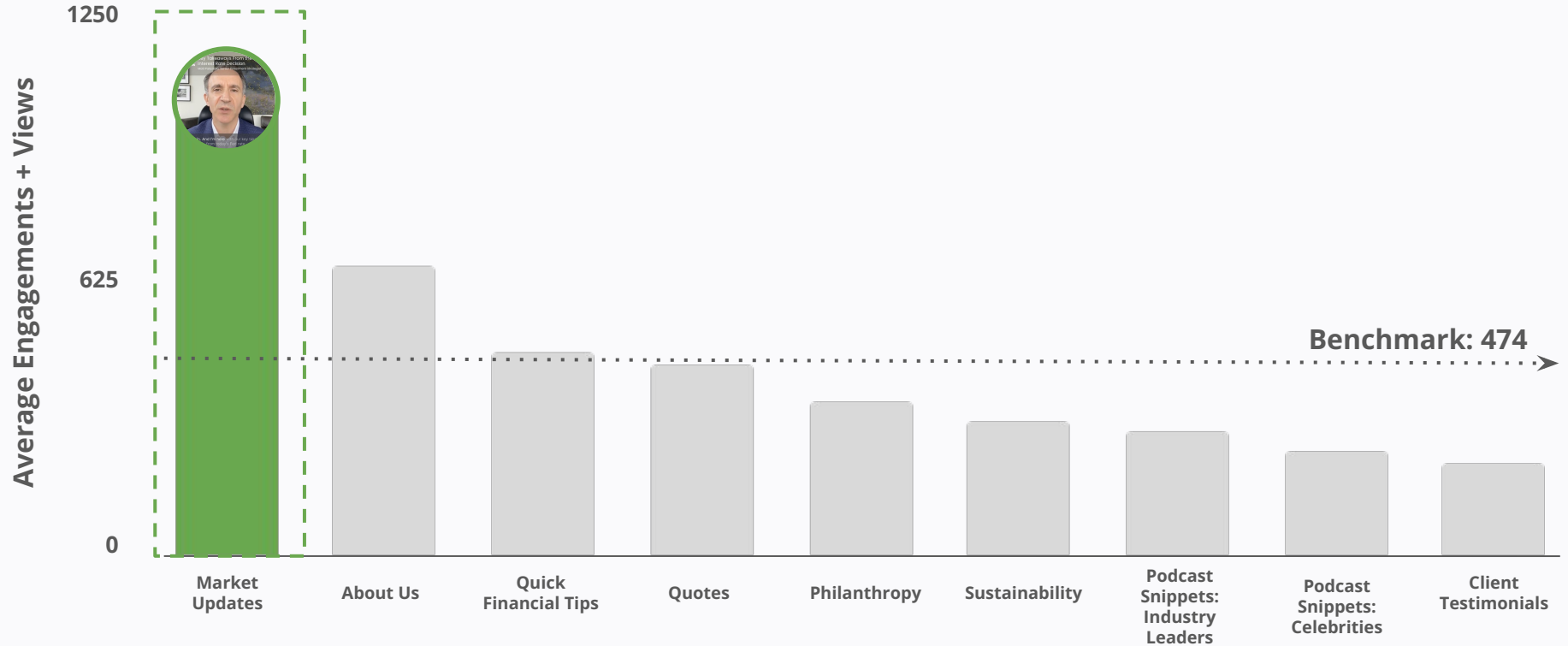
- **Words of Wisdom:** Putting a spotlight on an insightful quote that pertains to the topic that is expanded upon in the caption.

Instagram Content Bucket Definitions

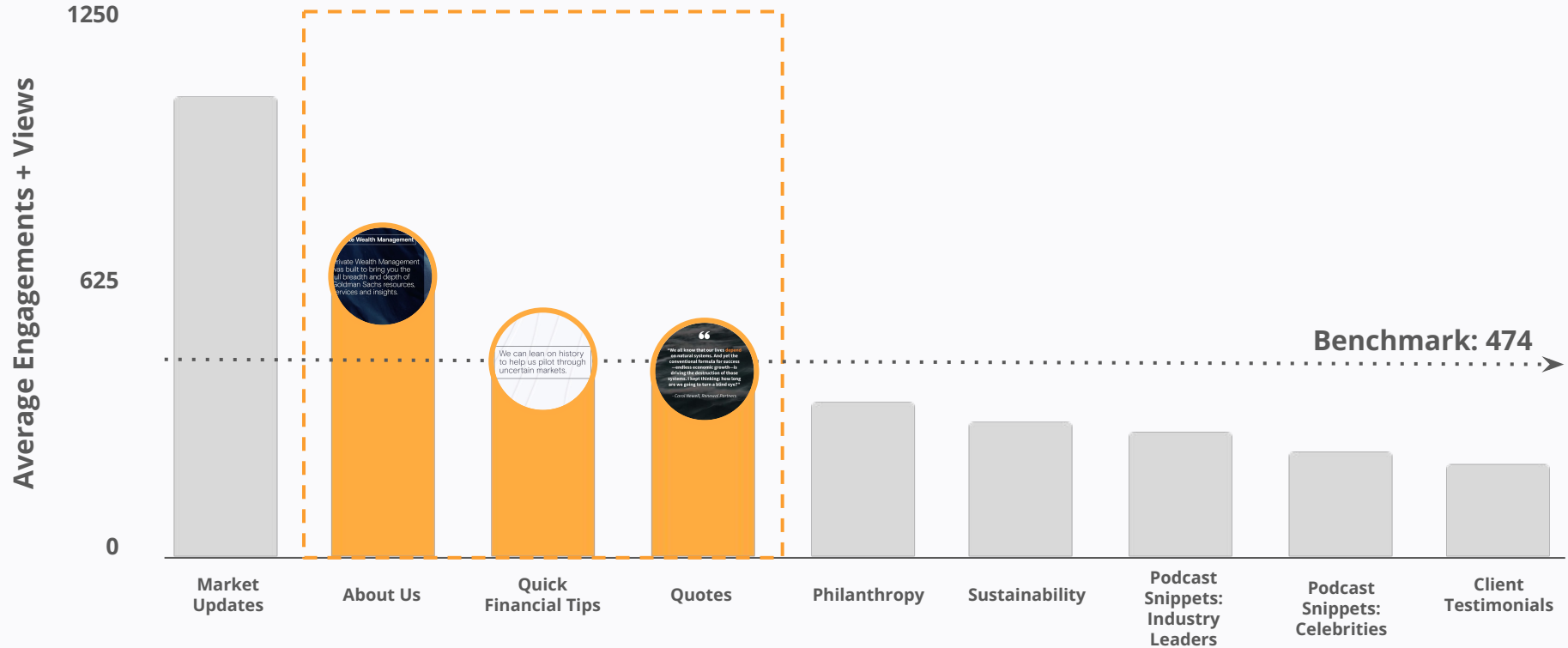
 Click to see example

- **Market Updates:** Informing viewers on the recent news about the state of the economy and providing financial market predictions.
- **About Us:** Providing clarity and insight on the firm's operational processes and how they take care of their clients.
- **Quick Financial Tips:** Quick and easy to understand videos that ask the viewers' relevant questions while providing educational answers to the topic.
- **Quotes:** Putting a spotlight on an insightful quote that pertains to the topic that is expanded upon in the caption.
- **Philanthropy:** Showcasing company executives talking about a cause the firm supports along with supportive visuals or taking the viewer along to a philanthropic event.
- **Sustainability:** Providing examples for viewers on how they can make a positive impact on the environment through their investments.
- **Podcast Snippets: Industry Leaders:** Repurposing podcast content where financial industry executives and entrepreneurs are interviewed; the audio content is paired with a visual quote from the speaker, the speaker's photo, and company title.
- **Podcast Snippets: Celebrities:** Repurposing podcast content where athletes, artists, and entertainers are interviewed; they talk about their life currently, how they made it to where they are now, and their impact.
- **Client Testimonials:** Clients are interviewed about their story and how the firm aided them. Then, they're photographed on a set.

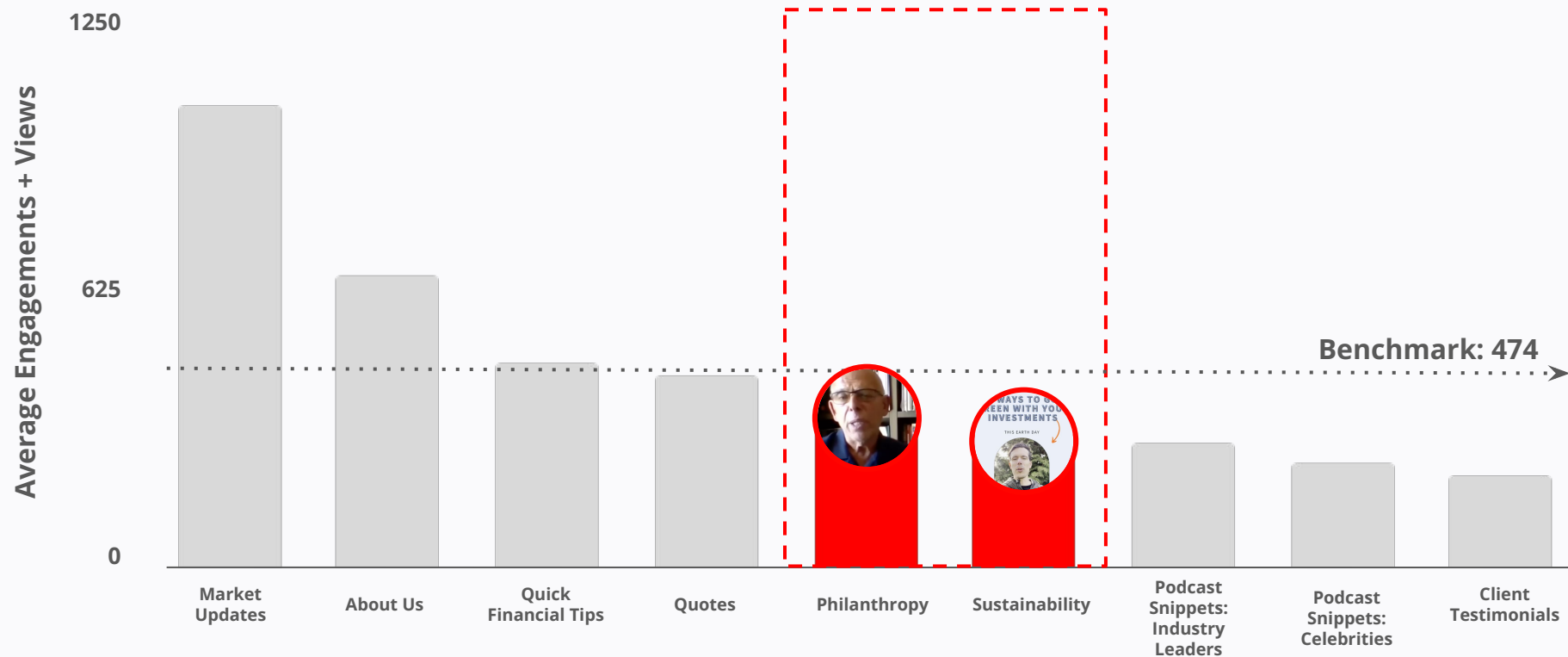
Excellent performing content categories for the Financial High-Net-Worth audience on Instagram include:



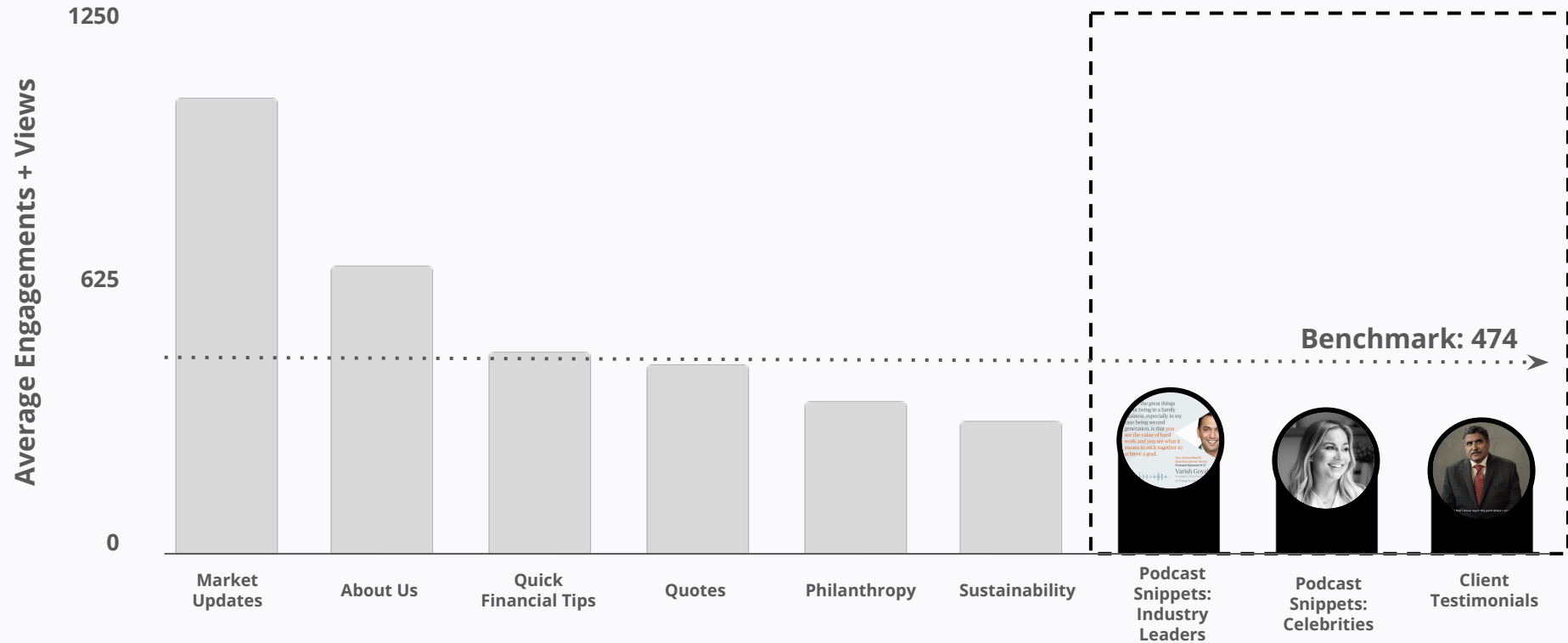
Good performing content categories for the Financial High-Net-Worth audience on Instagram include:



Substandard performing content categories for the Financial High-Net-Worth audience on Instagram include:



Low performing content categories for the Financial High-Net-Worth audience on Instagram include:





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[Click to view](#)

Content Opportunities:

#1. Market Updates

Financial Market News & Advice

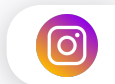
Informing viewers on the recent news about the state of the economy and providing financial market predictions.

Tactics to Implement:

- **Make it Digestible:** The video to [the right](#) gives an update on the current state of the economy by providing context from the past and using that to give an estimate for the future; all in a short and easily digestible way.
- **Text Reveal Effect:** Both videos reveal the text that is synchronized to either match a viewer's reading pace or match the speaker's voice.

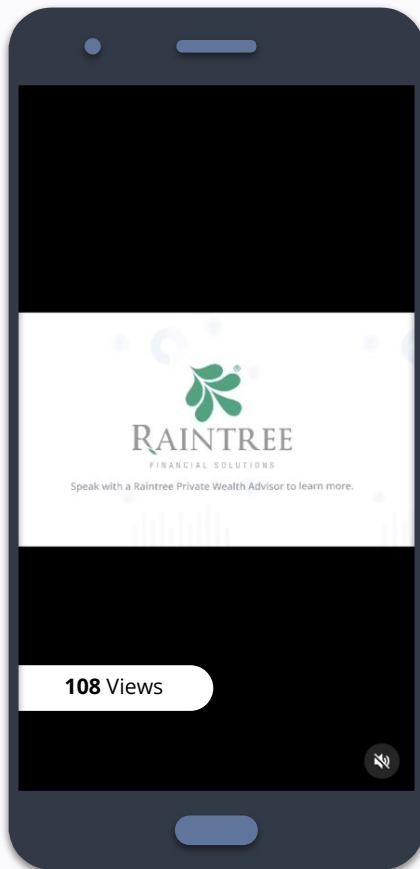
Top Format:

- **# of Hashtags:** 0 & 2





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Content Opportunities:

#2. About Us

How the Firm Operates

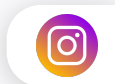
Providing clarity and insight on the firm's operational processes and how they take care of their clients.

Tactics to Implement:

- **Providing Examples:** Both videos provide concrete examples of how exactly the firm takes care of their clients or makes their investment decisions.
- **Visual Learning:** The video on [the right](#) goes even further by providing animated examples to match their educational audio.

Top Format:

- **# of Hashtags:** 3 & 29





Content Opportunities:

#3. Quick Financial Tips

Helpful Educational Topics

Quick and easy to understand videos that ask the viewers' relevant questions while providing educational answers to the topic.

Tactics to Implement:

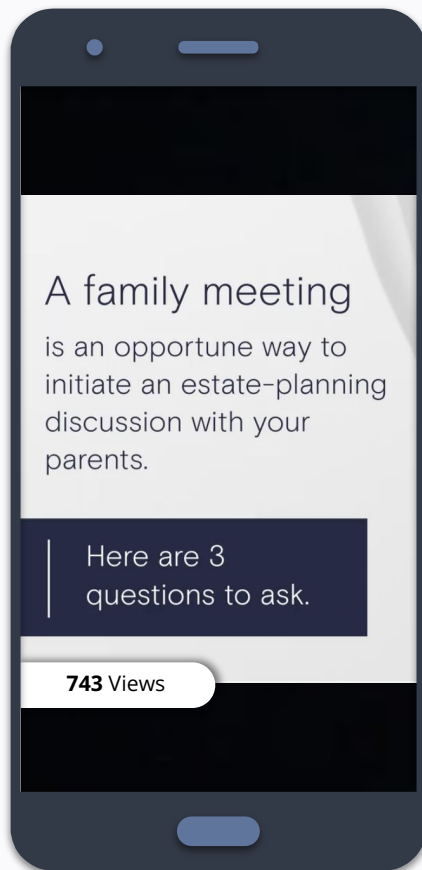
- **Statistic Backed:** In the video on the [left](#), statistics about failed estate transfers are shared with the viewer to work as a stark reminder of the benefits of having an advisor.
- **First-Person POV:** In the video to [the right](#), the questions presented to the viewer are written from their perspective and allows them to easily utilize the information later without having to rewrite the question.

Top Format:

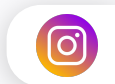
- **# of Hashtags:** 2 & 0

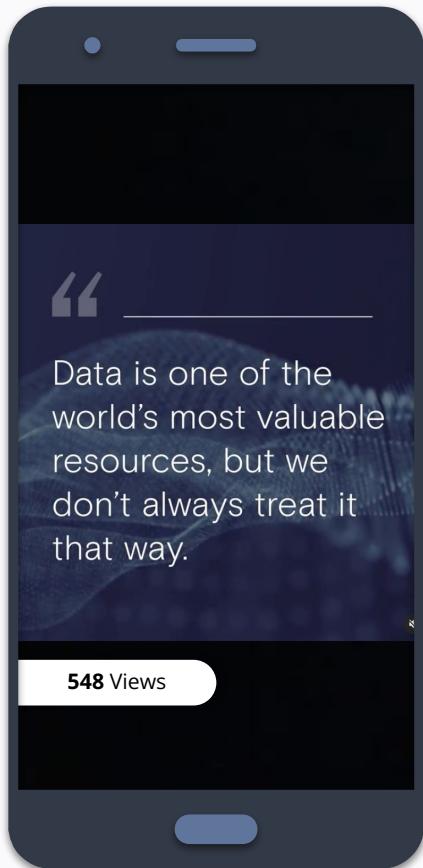


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Content Opportunities:

#4. Quotes

Words of Wisdom

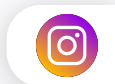
Putting a spotlight on an insightful quote that pertains to the topic that is expanded upon in the caption.

Tactics to Implement:

- **Mesmerizing Background:** Both videos utilize an ever-changing background that is fluid; the movement helps keep viewers entertained.
- **Call-to-Action:** Both videos have a CTA tagline in their caption that compels the viewer to either contact an advisor or click the link in their bio.

Top Format:

- **# of Hashtags:** 0 & 6



Outliers:

These videos were omitted from their content buckets as 'viral' outliers for exceeding 3x the views and engagements of their respective benchmarks.

Podcast Snippets: Celebrities



[Click to view](#)

Tactics:

Going outside the financial industry box and getting an athlete to chat about their life philosophies, their past, and their goals.

Quick Financial Tips



[Click to view](#)

Tactics:

Putting an attention grabbing question and hook line in the beginning of the video captures the viewer's curiosity quickly.

Podcast Snippets: Industry Leaders



[Click to view](#)

Tactics:

The audio clip is paired with synchronized subtitles that highlights each word as it's spoken.