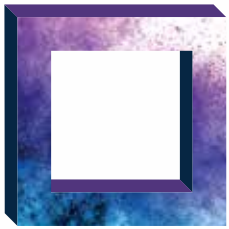


2018 Awards for
Marketing
Effectiveness

Winners and Commended

www.thefsforum.co.uk/awards

With thanks to all our judges

Jamie Brookes
Head of Communications, RBS

Kirsten Burt
Executive Director, Head of Marketing, UK & Jersey, UBS Wealth Management

Lucian Camp
Principal, Lucian Camp Consulting

Jet Cooke
Head of Marketing - End Investor, Fidelity International

David Cowan
Managing Director, The Financial Services Forum

Mark Evans
Group Marketing Director, Direct Line Group

Ian Henderson
Executive Creative Director, AML

Ian Holmes-Lewis
Chief Growth Officer, Boundless by CSMA

David Lundholm
Founder, Consistency Partners

Dev Malle
Group Sales Director, Myhomemove

Pete Markey
Marketing Director, TSB

Alastair Pegg
Marketing Director, The Co-operative Bank

Malcolm Oliver
Consultant, The Financial Services Forum

Marcus Oughton
Digital Marketing Manager, Simplyhealth

Alan Thompson
Chief Executive, The Haystack Group

Luis Rolim,
Interim Marketing Director, The SR Group

Patrick Waldron
Chief Executive, Planet

Helen Westbrook
Head of Marketing - Europe and Middle East, HSBC Private Bank

Dileas Winslow
Independent Marketing and Communications Director

2018 Awards for

Marketing Effectiveness

The Financial Services Forum Awards for Marketing Effectiveness are dedicated to recognising and rewarding proven success in the creation and promotion of financial services and products.

Introduced in 2002, their purpose has remained consistent:

- **to create a better understanding of the role and impact of marketing**
- **to prove, beyond doubt, that marketing can be effective**
- **to promote and reward marketing effectiveness.**

Our Awards remain the only ones committed to recognising marketing effectiveness in financial services. Size of budget is not the driver of success. Creativity is only one part of the process. It is the overall contribution to business performance, and effectiveness, that counts.

The number of Award entries continues to grow, with financial services organisations and their agencies delivering creative and innovative campaigns that have achieved outstanding results.

I would like to thank all the entrants, the judges for their continued support and effort, but most of all congratulate the winners and commended entries for their outstanding achievements.

David Cowan
Managing Director,
The Financial Services Forum

Award for Most Effective

Advertising

Winner

Direct Line Group: Don't Let a Little Accident Stop You

When Direct Line launched its pioneering 'onward travel' proposition (the promise to provide a taxi to anywhere in the UK after an accident), it needed a stand-out advertising campaign to match. Showcasing the new proposition, the 'Don't let a little accident stop you' campaign has not only utilised cutting-edge geotargeting digital creative (a sector-first) it has been Direct Line's most successful campaign to date, delivering: Brand recognition and awareness that outstripped all internal benchmarks; Across-the-board increases in brand sentiment; Market-leading brand preference and consideration, the driving force behind an uplift of 14% in quotes and 16% in sales.

Commended

Thai Life Insurance (Ogilvy Group Thailand): Life as an Opportunity

Fidelity International: The Top-Dog Advertising Campaign

AXA Investment Managers (AML Group): Join the Robotech Revolution

The Co-operative Bank: 25 Year Ethical Policy

Award for Most Effective

Content Marketing

Winner

Wesleyan Assurance Society: A Fresh Approach to Connecting with Legal Professionals

By placing the needs of this hard to reach customer segment at the heart of their campaign, Wesleyan have been able to: consistently engage with over 100 key decision makers within UK law firms, over a six-week period; develop understanding of their brand and Group-wide value proposition amongst this audience; build GDPR compliant data lists; reduce reliance on their outbound calling agency; achieve consistently high email open rates of up to 60% and click through rates of up to 59%; increase telephone contact rates with decision makers from 34% to 85%; demonstrate a positive ROI of this pilot approach to customer acquisition.

Commended

Schroders: investIQ

Bud: Bud's Book on Open Banking

Award for Most Effective

Brand Strategy

Sponsored by:

LIBERTINE

Winner

Janus Henderson Investors: The Janus Henderson Brand Merger: 1 Plus 1 Can Make 3

In 2017, Henderson Global Investors and Janus Capital faced one of the most monumental marketing challenges in their history – the $331bn merger of the two brands. Determined not to suffer the reputational and financial repercussions of the high-profile Standard Life Aberdeen merger, insight led to the shaping of an innovative brand strategy for the UK – and internationally. Results bucked the trends of past mergers creating significant upward shifts in brand recall, intention to buy – and $bns in inflows.

Commended

Tilney (Teamspirit): From Unknown to Trusted Wealth Brand

clientship
prime customer strategy

The Winning Formula To Customer Experience Success

Lexden, The Customer Experience Practice is proud to announce combining our talents with the international CX advisory group Clientship. As **Clientship UK,** we will combine over 30 years of expertise supporting financial services clients to deliver effective customer experience strategy, design, activation and technology solutions.
Clientship.com ¦ christopher.brooks@clientship.com

Congratulations to tonight's Finalist and Winners. We hope 2018 proves a milestone for you too.

Award for Most Effective

Customer Experience

Sponsored by:

clientship
prime customer strategy

Direct Line Group

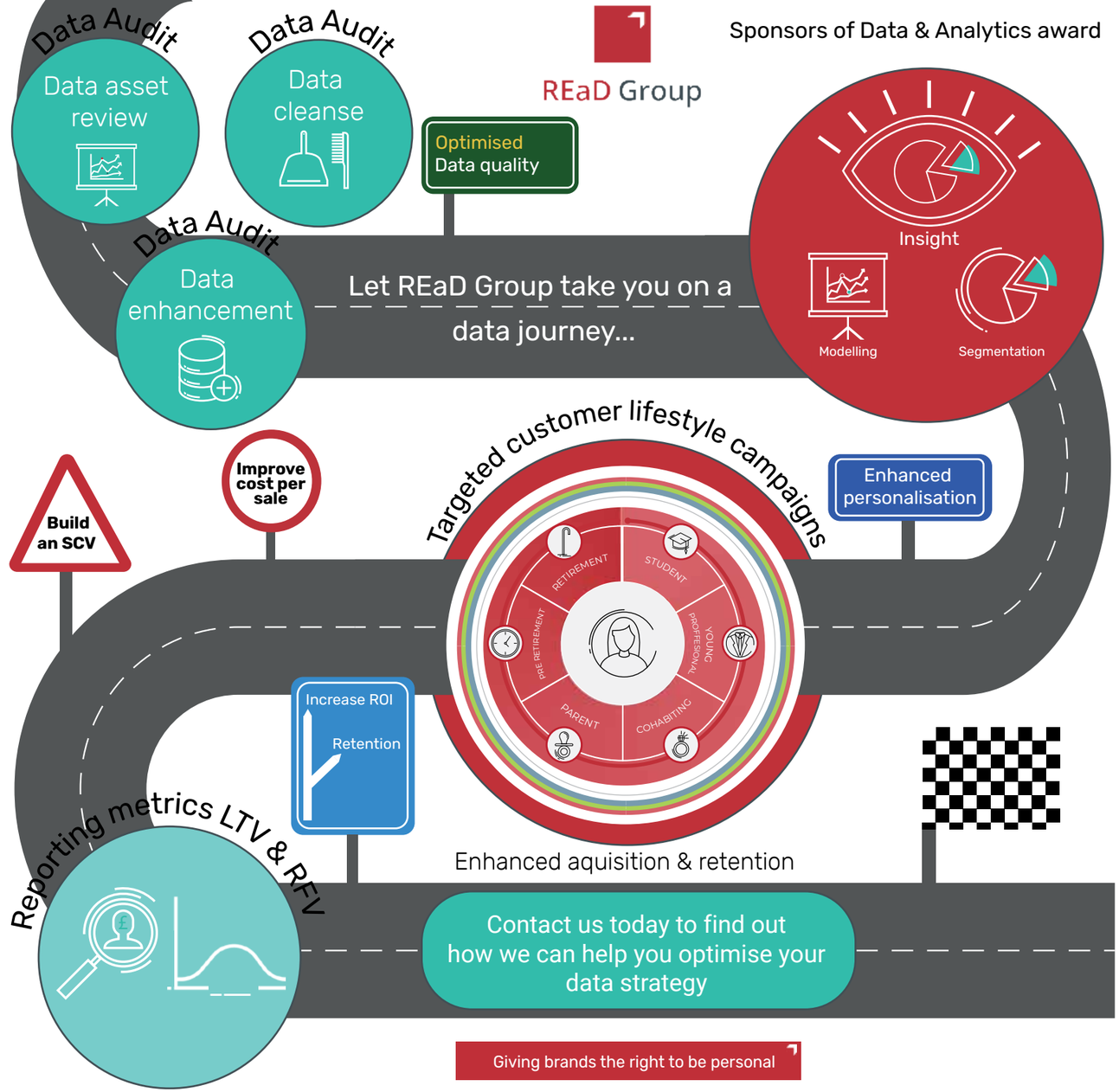
Winner

Direct Line Group: Customer Experience Strategy

The Direct Line Group (DLG) is Britain's leading personal motor and home insurer. They operate a multi-brand, multi-product and multi-distribution channel business that covers the majority of customer segments for personal lines general insurance and small and medium-sized enterprise commercial insurance. The flotation of DLG on the London Stock Exchange (October 2012, divesting from the RBS Group) marked an important milestone in their history, enabling them to start on a newly reinvigorated journey as a stand-alone company with a clear identity. In an industry where everybody is seen as the same, they wanted to stand out for something different - customer experience.

Commended

Janus Henderson Investors: Making Customer Experience Eventful



Award for Most Effective

Data & Analytics

Sponsored by:

REaD Group

Winner

Fidelity International: A Customer-First Approach to GDPR

Fidelity embarked on an extensive programme to ensure they met the requirements of GDPR with minimum disruption to their customers by creating a fully automated closed-loop process and communications that were relevant, timely and wanted. To do this, they spent many months putting in place processes and systems, as well as applying creative insights and best practices. This customer-centric approach resulted in exceeding all targets. Most significantly, they now have a larger marketable pool of clients than they did pre-GDPR, who are arguably more engaged with Fidelity.

Commended

Bud: Bud's Data Engine – Bringing User Experience to Life

Award for Most Effective

Digital Marketing

Sponsored by: brandworkz

Winner

First State Investments (The Dubs): Diversified Growth Fund: A Smart Evolution

A Smart Evolution was First State Investments' first marketing campaign to promote their Diversified Growth Fund to UK Financial Advisers. This is the first multi-asset product from First State, launching in a saturated market. Not known for multi-asset, they had the difficult task of gaining attention from established mega-competitors, requiring a memorable point of difference. With a budget well below many competitors, FSI took an innovative and agile approach to media, and a calculated risk to 'look different' in order to earn attention and leads using interactive, digital tools. The results surpassed targets by more than 82%, the social prospect conversion rate peaked at 7.9% and research on third-party platforms increased by 495% during the campaign.

Commended

The Cambridge Building Society (Teamspirit): Making Digital Mutual

Canaccord Genuity Wealth Management (Appius): CGWM Wealth Confidence Builder

Award for Most Effective

Direct Marketing

Winner

Profile Pensions: Direct Mail Super Powers

Profile Pensions is an FCA authorised, award winning pension adviser created specifically to serve the millions of people in the UK who do not have access to or cannot afford financial advice. In as little as 12 months they completely revamped their customer acquisition strategy switching from 100% reliance on cold calling to 90% reliance on direct mail and 10% reliance on digital marketing.

Switching to direct mail has led to a 55% increase in month-on-month customer acquisition, driven by a 6.1% total return (mailed three times) on cold data, supporting YOY business growth of 33%.

Commended

Skipton Building Society: My Review Direct Mail Strategy – Successfully Promoting Face-to-Face Business in an Increasingly Virtual World

Lloyds Banking Group (Proximity London): Online Car Finance – Refinancing Test

Wesleyan Assurance Society: Back to School for Teachers

Award for Most Effective

New Product, Service or Innovation

Winner

LV= (Designate): From The Heart

LV= was under threat from competitors who were spending more and trying to emulate LV='s success. They knew their response needed to come 'From the Heart' so launched a new multi-car policy as part of a fully-integrated campaign. The targets were ambitious but the results have been truly phenomenal. Since campaign launch: motor sales have hit their highest ever levels (drastically up year-on-year); dramatic brand health improvements, reclaiming 1st position across key YouGov scores, and 17% improvement in consideration; overall search web traffic +40% year-on-year, with Google search rank for 'multi-car insurance' improving from 8th to 1st place.

Commended

Aviva (Adam & Eve DDM and Zenith Optimedia): Ask It Never

Award for Most Effective

Integrated Campaign

Sponsored by: PUBLICIS.SAPIENT

Winner

Direct Line Group: Don't Let a Little Accident Stop You

By 2017, Direct Line's rebrand as the 'Fixers' of the insurance world had bedded-in and the brand was back in growth. But with competitors vying for its top spot, it sought new ways to keep the Fixer reputation front-of-mind. Direct Line launched a disruptive integrated campaign, 'Don't let a little accident stop you', to market a pioneering 'onward travel' proposition. Utilising cutting-edge digital formats and reinvigorating formerly-underperforming channels, it has been Direct Line's most successful campaign to date, delivering: Benchmark-busting brand recognition and awareness; Across-the-board brand sentiment uplifts; Market-leading brand preference and consideration, the driving force behind double-digit business growth.

Commended

LV= (Designate): From The Heart

Aviva Investors: A Multi-Asset Funds Integrated Campaign

Award for Most Effective

Public Relations

Commended

Direct Line Group (Mischief): Smart Crossing

Zurich UK (Teamspirit): Restless Worklife - Protecting the Gig Worker

The growing importance of innovation in financial services today, and its vital role in engaging with and empowering customers in the future, prompted us to launch the Awards for Product & Service Innovation in 2018 – recognising innovation in financial services that delivers tangible benefits to both consumer and provider.

Entries are free before 14 December 2018

To request entry materials please email Richard Nolan: rn@thefsforum.co.uk

2019 Awards for

Product and Service Innovation

Entry deadline 18 January 2019

Award for Most Effective

Social Media

25 YEARS OF OUR CUSTOMER-LED ETHICAL POLICY

Winner

The Co-operative Bank: 25 Year Ethical Policy

2017 marked the 25th anniversary of The Co-operative Bank's Customer-Led Ethical Policy. It is this approach to banking that is still unique in the UK today. We know our 4 million customers choose to bank with us because of this ethical approach to banking so it was important to celebrate this milestone with our customers; to thank them for their continued loyalty despite a tumultuous few years; including the need to recapitalise the bank in 2017 where we needed to find additional investment or to look to be acquired through a sale As a Bank that traces its roots back to the Co-operative movement; we needed to tangibly demonstrate and evidence to colleagues and customers that our commitment to values and ethics is as important today as it has ever been.

Commended

Barclaycard (Iris): The Barclaycard 31 Day Challenge

Award for Most Effective

Relationship Marketing

Sponsored by:

PHOEBUS
SEAMLESS SOFTWARE SOLUTIONS

Winner

Wesleyan Assurance Society: Back to School for Teachers

Wesleyan understand how hard education professionals work helping to prepare the younger generations for the future, so it's hardly surprising if they don't find time to keep on top of their finances. We've taken a brand-new approach by visiting schools in the UK to provide teachers under the age of 50, with free Financial Planning Seminars. Our aim is to provide advice and support to teachers throughout their financial journey, from Newly Qualified Trainee to Retirement, at a time that suits them. Seminars are led by our Financial Consultants who advise on Mortgages, Savings & Investments, Retirement Planning and Tax. In 2018 we will deliver over 600 seminars and based on figures to date will generate in excess of 1,800 leads. The results and feedback have exceeded our expectations.

Most Effective Campaign

Asset Management

Winner

Fidelity International: The Top-Dog Advertising Campaign

In all ISA seasons, all investment companies need advertising with cut-through to reach existing and potential customers who are free to choose a different provider every year. Instead of creating something new, Fidelity decidied to use the most successful creative approach from last year and develop it into a full suite of advertising concepts based around the same core image area. This helped them achieve significantly higher targets with the same media spend, while building brand awareness and creating a distinct tone of voice in the marketplace.

Most Effective Campaign

Retail Banking

Winner

The Co-operative Bank: 25 Year Ethical Policy

2017 marked the 25th anniversary of The Co-operative Bank's customer-led Ethical Policy. It is this approach to banking that is still unique in the UK today. They knew their 4 million customers choose to bank with them because of this ethical approach to banking so it was important to celebrate this milestone; to thank them for their continued loyalty despite a tumultuous few years; including the need to recapitalise the bank in 2017 where they needed to find additional investment or to look to be acquired through a sale. As a Bank that traces its roots back to the co-operative movement; they needed to tangibly demonstrate and evidence to colleagues and customers that their commitment to Values and Ethics is as important today as it has ever been.

Most Effective Campaign

Insurance

Winner

Direct Line Group: Don't Let a Little Accident Stop You

When Direct Line launched its pioneering 'onward travel' proposition (the promise to provide a taxi to anywhere in the UK after an accident), it needed a stand-out advertising campaign to match. Showcasing the new proposition, the 'Don't let a little accident stop you' campaign has not only utilised cutting-edge geotargeting digital creative (a sector-first) it has been Direct Line's most successful campaign to date, delivering: Brand recognition and awareness that outstripped all internal benchmarks; Across-the-board increases in brand sentiment; Market-leading brand preference and consideration, the driving force behind a 14% quotes uplift and 16% sales uplift.

Most Effective Campaign

Private Banking & Wealth Management

Winner

Tilney (Teamspirit): From Unknown to Trusted Wealth Brand

In 2016, Tilney had a decision to make. Having acquired Towry at considerable expense and fighting for an ownable space in a crowded and competitive market dominated by vocal and visible rivals, they needed to review their house of brands to grow fast. For the company's leadership, this wasn't just business, it was personal. Tilney embarked on a brave rebranding campaign, underpinned by extensive research and some fascinating insights, a stand-out creative campaign that got to the heart of the relationship between clients and their money, and a precision-targeted media strategy. But the bigger the risk, the bigger the reward and the results on all fronts, from brand awareness and consideration to the all-important sales pipeline, far exceeded all expectations and targets.

Most Effective Campaign

Challenger Brand or Fintech

Winner

Bud

Data, and the analysis we gleam from it, is at the heart of everything they do at Bud: providing users with key insights on their financial data; monitoring application usage to gauge feature engagement and improve UX; and marketing the most relevant financial solutions to an individual user in the most timely and simplistic manner. As a platform, Bud provides a plethora of third party products via a marketplace and leverages transactional data as an account information service provider, the combination of which enables them to become one of the most effective marketeers of financial services in the world.

Most Effective Campaign

Business to Business

Winner

AXA Investment Managers (AML Group): Join the Robotech Revolution

Faced with the challenge of attracting $300m-worth of investment to a new fund focusing on Robotic technology, AXA Investment Managers knew that with intense competition from finance giants, things were going to be tough. Working with advertising agency AML, AXA IM set up a series of live events and a dedicated website and communications to establish itself as the trusted guide to the new technological landscape. The campaign exceeded every target many times over. Crucially, it attracted £1bn in investments, and helped AXA IM attain 7% year-on-year growth. Meanwhile, similar-sized rivals saw lower growth or even declined.

Most Effective Campaign

International (non-UK)

Winner

Thai Life Insurance (Ogilvy Group Thailand): Life as an Opportunity

Thai Life was experiencing an extinction crisis of insurance agents, 90% of its total sales generator, since agents were perceived as a dead-end job for the desperate who had no other choice in life. This online recruitment campaign aimed to recruit prospects who are underdogs with “life scars” and give them an opportunity for salvation by signing up with Thai Life. The result was one of the great successes in Thai Life’s history and proved that its iconic emotional branding “Value of Life” and its belief in “Life Agents” could turn a crisis into an opportunity.

Most Effective Campaign

Small Budget

(below £1m total marketing spend)

Winner

Cambridge Building Society (Teamspirit): Making Digital Mutual

The Cambridge’s legacy website was increasingly hampering its business performance. Needing to cater for both its broker and end-customers’ needs, it was failing to meet either. At the start of their hugely ambitious five-year digital transformation journey The Cambridge Building Society completely transformed their web presence and took the decision to split one site in to two. The two new sites were launched on 21st November 2017 and since then have almost doubled broker traffic, driven up to 715% more visits to specific target pages and driven a 10% increase in overall customer satisfaction.

Opinium presents

Brands must continually find new ways to connect with consumers in order to thrive and grow

The Most Connected Brands 2018

6,000
UK consumers

48,000
Brand reviews

11,000
Spontaneous brand mentions

27
Expert contributors

1
Brand index

Download the report at
mostconnectedbrands.com

What people think, feel and do

opinium.co.uk
@MostConnectedUK

Judges' Special Award

Best Consumer Insight

Sponsored by:

Opinium

Winner

Thai Life Insurance (Ogilvy Group Thailand): Life as an Opportunity

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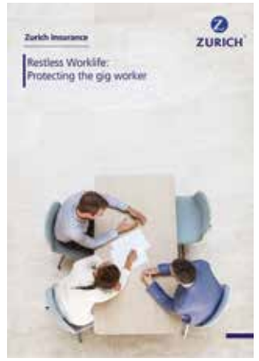
INSIGHT: A person who has life scars is deeply empathetic in caring about others.

Records showed that the existing high performing 'Life Agents' shared extraordinary records of life history: they have passed through moments of despair, from unemployment to even suicide. With these severe life scars, they understand the sufferings of life and they know how much a 'life opportunity' is profoundly worth for every human being. Therefore, they would do their best to give this opportunity to those in need, whether through birth, sickness, old age, or death, all of which are the truths of life that life insurance could play a role in.

Judges' Special Award

Marketing Learning



Winner

Zurich UK (Teamspirit): Restless Worklife - Protecting the Gig Worker

Each year the judges present this Award to a campaign or activity that helps the financial services marketing community improve the way it executes strategic and tactical marketing activities. It should advance our thinking in delivering particular marketing methods. This year, the judges selected Zurich UK and their agency Teamspirit as the winner, for their use of longitudinal modelling. In this particular case, it was used to analyse the gig economy, to understand long term savings behaviour, and understand the impact in savings and protection policy.

Judges' Special Award

Marketing Excellence

Sponsored by: BT

Winner

Winner – Direct Line Group

The judges saw some exceptional entries again this year. In recent years, Direct Line Group has been the financial services organisation setting the standard for marketing in our sector. They have shown excellence in the delivery of their marketing execution and consistency across a number of disciplines. Although the gap is closing, with several organisations making significant improvements to close the gap, Direct Line Group retained the Award for Marketing Excellence.

Members' Award

Agency of the Year

Winner

BJL Manchester

BJL Manchester's 'Nagging Doubt' campaign for Swinton Insurance was based on research that found that people who rush to buy cheap insurance are often left with a feeling of doubt about whether they have the right cover. Overall the campaign resulted in a 24% increase in home insurance quotes, plus a significant increase in brand attribution.

Their work with Skipton Building Society, meanwhile, has involved helping the 165-year-old business to update its brand identity for the modern day and convey a clear and confident tone of voice to customers.

And for The Co-operative Bank they are producing compelling, relevant and timely customer communications supporting the Bank's core ethical and business aims.

Members' Award

Best Corporate Social Responsibility Activity

Sponsored by:
CAF
Charities Aid Foundation

Winner

Bank of Scotland: MacMillan Cancer Support

The health implications of cancer are well known. But the disease unfortunately carries severe and often hidden adverse effects on household finances. Recognising this, Bank of Scotland partnered with Macmillan Cancer Support on a pioneering project to provide financial support for customers with cancer. In an effort to increase brand preference for the bank, they created a campaign to tell Scotland about this partnership and offer help to those who need it. They delivered a successful, positive and factual campaign that raised awareness of the costs of cancer, whilst delivering effective reach and engagement with customers.

Members' Award

Young Marketer of the Year

Sponsored by: aprimo

Winner

Clarissa Ly, The Co-operative Bank

2017 was a challenging time for The Co-operative Bank. With the sale announcement came uncertainty, and perceptions over whether they remained true to their ethical heritage. In a marketer's perspective this was a great opportunity to launch a nostalgic, emotive campaign to demonstrate the Bank's ongoing commitment to delivering values and ethics, reclaiming our position as 'The Ethical Bank'. To achieve this, Clarissa delivered a series of campaigns which expressed the reasons why customers bank with them, achieving some outstanding results.

This wasn't the first time Clarissa had been shortlisted for the Young Marketer of the Year. Following some great achievements in both 2016 and 2017, she missed out on the award by the smallest of margins. Although previous results were not considered during the Members' vote, winning the award in 2018 seems to be just reward for her consistent marketing effectiveness in recent years.

Members' Award

Marketer of the Year

Sponsored by: aprimo

Winner

Alastair Pegg, The Co-operative Bank

Alastair has built on the integrated marketing strategy that has been instrumental in reasserting The Co-operative Bank reputation as an ethical business in recent years. This includes developing an ethical segmentation of the retail banking market which has been aligned across all Co-operative Bank products to guide future product development. The strategy helps to ensure that the brand promise is carried through into the products and services they offer customers and the community, and that the proposition is clearly differentiated from other banks.

Brand communications in the last 18 months include the launch of a major marketing campaign to mark the 25th anniversary of The Co-operative Bank's customer-led ethical policy. They created a number of customer-centric films to show that the bank's ethical policy is still unique in the UK banking sector, and just as relevant today as it ever was. Coinciding with The Co-operative Group's final divestments of its stake in The Co-operative Bank, the campaign was crucial in reassuring, retaining and attracting new customers during the sale process.

Alastair has also driven brand purpose through partnerships this year – notably with Centrepoint, which has seen The Co-operative Bank become the biggest supporter of the homeless charity in the UK.

The Financial Services Forum

Keeping abreast of current trends and changes across financial services marketing is vital in this fast-moving business environment. The Financial Services Forum bring together senior marketers to debate business issues, with the ultimate aim of improving their marketing effectiveness. With a community of over 3,000 Members, here's a little bit more about what we do:

Putting marketing effectiveness first

The Financial Services Forum exists to generate debate and provide insights that will help our Members improve their marketing effectiveness. We believe that better marketing is not only good for the financial services industry, but also good for the customer.

Addressing different agendas

We recognise that the financial services industry is not a homogenous community. To reflect its diversity we address the challenges facing specific sectors via a number of Special Interest Groups, covering industry agendas as well as key marketing disciplines. We tackle consumer marketing issues, but also B2B and institutional marketing topics.

Advised by industry leaders

Content at our events, and on our website, is designed for our Members, by our Members. Our Advisory Board comprises leaders from across the industry, supported by Steering Committees in each of our Special Interest Groups where industry professionals advise us on the issues of the day and the themes we should be addressing to stimulate discussion and debate.

Delivered by experts

The Forum takes an independent and objective view on who should present at our events or publish on our website. We aim to select the best speakers and authors, to provide a platform for thought leaders and expert practitioners, solely for the benefit of our Members.

Connecting people

Being part of a community of like-minded marketers provides our Members with a valuable network of their industry peers. These relationships are built over many years and can last a professional lifetime. We are privileged simply to provide the opportunities for our Members to meet and get to know each other.

The right balance

Our Executive Members are Director-level business leaders, usually responsible for their organisation's marketing strategy. Our Associate community provides a forum for marketing and communications managers, offering best practice models and case studies for those actively engaged in running their organisation's marketing campaigns. Practitioner Members reflect the important contribution to new learning in financial services marketing from agencies and consultancies across all disciplines.

Membership

The Financial Services Forum has a variety of membership options to meet the needs of individuals, teams and companies, in financial services organisations or their agencies, in the UK and around the world.

Annual subscription

In exchange for a single annual subscription, Members can access any of the events they are eligible to attend within their membership category. None of our seminars or conferences carry a separate entry charge.

How to join

If you would like to join The Financial Services Forum, further information and an application form can be found via www.thefsforum.co.uk. Alternatively, you can call Malcolm Dunn on 020 3657 9891.

@TheFSForum

the-financial-services-forum

The Financial Services Forum
1st Floor, 251 Pentonville Road, London N1 9NG
020 7449 9000
info@thefsforum.co.uk
www.thefsforum.co.uk
@TheFSForum

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