

The Ultimate Guide to **Content Marketing** for Financial Institutions



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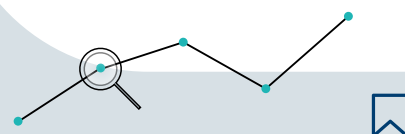
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Executive Summary

Millennials and Gen Z are extremely diligent about making financial decisions. Living in the age of infobesity and having seen the financial crisis of 2008 and the aftermath of the 2020 pandemic, they realise the importance of planning and managing their money. Most of all, they are sceptical of making mistakes by missing out on the fine print or being misled by flashy advertisements.

Research shows that 99% of today's customers will skip ads if given the choice. Then, how does a finance brand get through them? The answer lies in strategic Content Marketing. This whitepaper elaborates on the techniques to elevate your content marketing game with lessons from some exemplary campaigns.

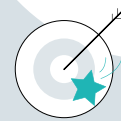
85%
of consumers in the young cohort conduct extensive brand research before making a purchase decisions.



Introduction

Successful content marketing translates into favourable behaviour from the target audience. Unfortunately, connecting with them is no cakewalk. This is especially true for the finance space, which is closely supervised by compliance frameworks. Undoubtedly, a financial institution cannot have Katrina Kaif eating a mango seductively to convey their message. However, this does not mean that your content should be boring. To deliver your message strongly and exert brand leadership, you need impactful content that hits the right cord with your audience every time.

52%
of financial organisations fail to reach their target audience



Mastering Content Marketing

Content is the lifeblood of digital marketing. Social media and most of the internet prospers due to the content individuals and businesses create. Financial organizations must, therefore, consider content more than just a tool to educate their audience or inform them about new product launches. To leverage the power of content, you must go above and beyond the traditional approaches. Take a look at what that means.

97%
of companies find success through their content marketing efforts



1. Focus on Building Trust in Your Brand

The digital customer is aware and wary of financial crime. Emphasising that you prioritise security with best practices and cutting-edge technologies and ensure compliance is critical. At the same time, given that 69% of customers distrust advertising, how do you create awareness regarding your focus on customer interests, security and compliance? The answer lies in storytelling. Choose from stories of your brand, its employees, or customers, and create a relatable story around customer's needs and compliance. Demonstrate responsibility and expertise while staying authentic to your purpose. Rely on industry data and research from credible sources to offer meaningful insights.



ZERODHA

The digital-first brokerage platform ensures that its clients know the importance of compliance. The brand provides insights into regulatory guidelines, technology initiatives to secure clients' funds against cyberthreats, and the importance of choosing a licensed brokerage. Zerodha also has a detailed blog on why it sent KYC re-verification emails to inactive clients. The brand created two opportunities out of its disengaged client base. First, by sending emails and second, by attracting traffic. Zerodha probably knew that tech-savvy customers would search for why they received that email. A bit of a genius trick there.

Lemonade

Consider Lemonade, a brand that understands that trust is the thread that binds clients to financial services while successfully positioning itself as a new-gen insurance provider. Lemonade has built trust by demonstrating a commitment to transparency and social responsibility. Staying transparent with fees, publishing its metrics, detailed reports about pay-outs and claims, and, of course, talking about doing so as a natural way of doing business. It shares stories of success and challenges to give a realistic picture of the brand to customers.

The brand uses a fresh-as-a-lemonade approach to content marketing and stands out with a charity angle in an industry that is not recognised for generosity. Lemonade became the first US company to deny underwriting to fossil-fuel projects. Sending away business for a sustainable future is truly a bold move that capitalises on the popularity of ESG initiatives. The brand even shared a detailed report to emphasise the importance of its stand and give social proof. Did you know Indian millennials and Gen Zers are more likely than the global average to pay more for sustainable products?

Trust has to be built via action and content. Letting your customers know of the ways you prioritise security and compliance instils trust. Understanding and responding to the issues your target audience faces is paramount to establishing a reliable brand image.

2. Align the Content with Your Brand's Personality

“Frost Bank understands the value of focusing advertising communications on the brand,” says Pam Thomas, former CMO of Frost Bank. Ensure that your content represents what your brand stands for, to build awareness, the first step for driving the client to the sales funnel.



Mastercard's 25th anniversary campaign, Priceless, in partnership with the Australian Open 2023, did this elegantly. The card provider built its campaign around the growing inclusivity culture in the country and clubbed tournament experiences with it. The campaign highlighted the brand's philosophy to "connect people to possibilities" in life. Mastercard engaged its audience with a web-based AR competition while also enabling visually impaired individuals to experience the tournament with a 3D spatial audio set-up.

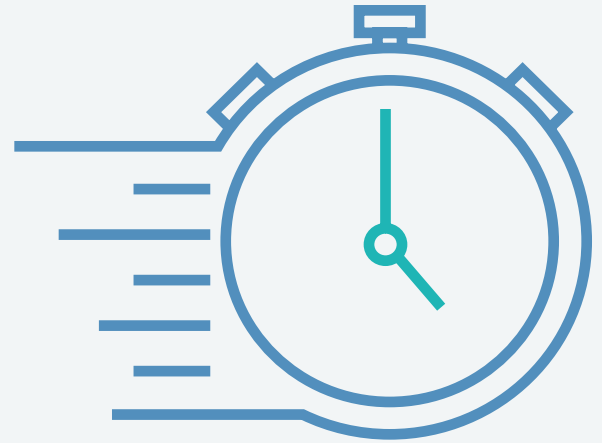
who gives a crap

Represent your brand's philosophy through your marketing campaigns just like Who Gives a Crap does. The toilet paper brand is known for its sustainable products and donating 50% of its profits to WASH (Water, Sanitation, and Hygiene) projects. Only a strategic content expert could imagine intriguing viewers by telling them that the future of the planet rests on their "cheeks," rather than the usual shoulders. The brand did just that with its Uncrap the World campaign. The advertisement goes on to navigate through people moving towards toilets where they use the brand's product. In addition to the brand "giving a crap," the campaign focuses on making the experience of using its products intrinsically rewarding by letting people know they are using recycled paper and saving trees. Most importantly, they informed customers that their money would be used for a purpose that matters – improving access to sanitation facilities. How much thought did you ever give to your toilet paper experience?

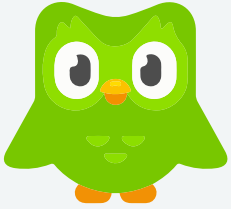
Your content should be grounded in your brand's core philosophy and highlight its values while you experiment with ambitious ideas.

3. Stay Classic and Chic

Staying relevant at a time when the finance industry is evolving at breakneck speed while maintaining a timeless brand image is as important as it is challenging. The stringent regulatory oversight makes balancing compliance with exploring novel content marketing ideas overwhelming.



Let's help you recall the State Bank of India's television advertisement from the early 2000s. The entertaining visual begins with a traditional office set-up with a 30-something man reminding people to call him Chimanlal Charlie, not Mohan (his original name). All because he lost a bet that claimed that SBI had the highest number of ATMs in the country. SBI used the advertisement to position itself as a leader in equipping the nation with a seamless cash-withdrawal facility and subtly register the acronym SBI in the viewer's heads. Not-so-subtle humour combined with content that wasn't even remotely educational was impactful and positioned the brand successfully with the abbreviation-obsessed cohort of the time. You could hear millennials calling people who did not know basic facts Chimanlal Charlie till Alia Bhatt became the brand ambassador of "not knowing things" due to a hasty response on a talk show.



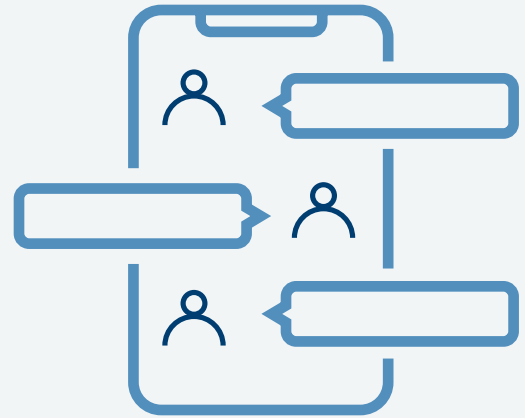
duolingo

Duolingo is an example of preserving your brand's legacy while staying on trend. The gamified learning app maintains its sense of humour and uses its mascots, the owl and its companions, to express its opinions, while not taking the brand too seriously. The brand's TikTok account rides on the trends in the market, such as Timbaland's hit track, Give It To Me, and the Finn Wolfhard meme. Blending Duolingo's humour with popular memes helped the brand's popularity grow exponentially. The brand even capitalised on the popularity of the Olympic Games by launching commentary-related and flirting courses along with the "Owlympics," a learning marathon for app users. The strategy highlights the importance of timing your campaigns right.

When you market yourself on any platform, whether social media or a billboard, remember why your audience goes there. Recognising and resonating with what the audience expects is the route to their hearts.

4. Make the Customer Feel Seen and Heard

Isn't that what we all want? Personalisation is no longer just a "good-to-have," it is a necessity of satisfying customer experiences. Leveraging customer data to serve hyper-personalised content emphasises that you care.



While email marketing is a long-standing content strategy, sending out bulk emails that end up in the trash is ineffective channel utilisation. HSBC exemplified leveraging customer data for content personalisation to boost customer engagement. It leveraged AI to predict user journeys and offer reward cards for their preferred segments. AI models predicted the best ways to encourage a client to redeem a reward card – by spending on apparel, home décor, or cashing out. Personalised email content for each category ignited interest, increasing the open rate to a whopping 40% and raising the usage of reward cards to 70%. If that doesn't speak for the power of content, what does?

With evolving customer needs and the dynamic financial space, it is crucial to create fluid personalities, considering seasonality, customer age, financial growth, etc. Personalisation can be based on events, geographical locations, channels, user activity, surveys, and real-time customer behaviour and preference monitoring.

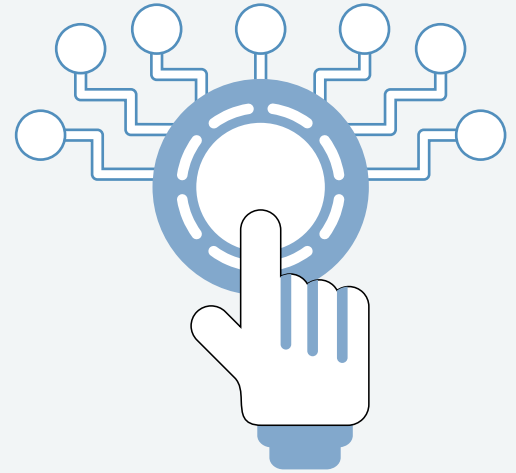


Spotify's annual "Wrapped" campaign is a great example of making the customer feel seen and heard. The audio streaming giant simply analyses its app usage over the year and offers insights into the moods, preferences, and choices of users. Allowing users to share their year through music adds to the brand's recognition. The campaign not only boosts engagement but also led to a 21% increase in downloads in December 2020, when it was first launched. Spotify went ahead and launched "Artist Wrapped" to encourage artists to thank their listeners, adding another dimension to engagement. This made artists and listeners (the two primary segments on the platform) feel more connected. Note that the content (Wrapped reports) is generated by user activity and brand marketing is also done by users. A great strategy and commendable execution, indeed.

Tailor your content to your users' needs, using their data.
Making the most of data is paramount. The good news is
that the financial industry has terabytes of it.

5. Add Value to Every Interaction with You

Releasing content that starts conversations between the brand and the customer is a popular and effective technique. SEO best practices can only make your content discoverable, turning visitors into customers and retaining them requires engaging content. Questionnaires, quizzes, interactive content, discussion forums across social media channels, etc., can help you learn more about your audience while actively engaging them.



Recognising the gap in and the potential of the digital marketing space, HDFC Securities has nailed usability and accessibility. The brand used the “Mooh Bandh Rakho” campaign to educate customers about secure financial practices in 2020. It leveraged the opportunity when everything was going online to drive traffic with things that people actually needed to learn. The brand leverages Facebook’s advanced targeting options to maximise its outreach by offering targeted financial advice. The #FaydeKeFeatures campaign helps customers differentiate HDFC Securities from other brokerages. It provides detailed how-to videos to help investors make the most of the investment platform. As one of the leading brokerages, backed by the trust of a world-class bank, it employs a user-friendly design to disseminate financial education. HDFC Securities’ website has a dedicated knowledge centre, regularly enriched with useful content that draws traffic from diverse sources, such as social media, organic searches and backlinks.



Ankur Warikoo, the renowned Indian “finfluencer,” started with downloadable Excel sheets that helped Indian plan their investments, retirement, and vacations. He informs his viewers about the correct way to use the sheet and empowers them to make the most of their money. His real engagement stems from the questions that arise. Viewers drop in comments on his YouTube channel, enquire on his Instagram, and attend his social-media live streams. He has built a personal (financial) brand by addressing real problems and positioning himself as an approachable advisor and mentor.

Engaging your audience in ways that adds value to them is critical to ensuring ongoing engagement. Address common pain points, educate and be of service in all ways your customer might need you to be.

6. Diversify Your Content

The niche financial space is already fraught with challenges, and limiting your brand to a certain type of content is a recipe for failure. Keeping your content fresh and leveraging innovative ideas is the key to standing out.



Groww

The simplified investment platform beat its peers and more experienced competitors, like Zerodha and Upstox, grabbing 23.4% share of the Indian brokerage market. The brand uses content marketing across platforms and formats to connect with its audience. Groww's marketing strategy encompasses it all – from blogs, newsletters, investment guides, and educational webinars to eyeball-grabbing posts across LinkedIn and other social media channels.

If you scroll through the investment platform's LinkedIn page, you won't find it overloaded with financial advice or investment tips. Rather, the brand talks about money. It talks about strategies that have worked for people and gathers interesting facts to keep the audience engaged in the possibilities presented by investing and financial planning. Plus, the blogs aren't the typical financial blogs, full of information and jargon that an average reader might not retain. The brand's blogs are all about interesting facts from across the financial space and key takeaways that could help readers improve their financial practices.

Revolut

A prime example of diversifying content is Revolut's efforts to connect with the youth. The company launched its <18 app for 6-17-year-olds in 2022. By April 2024, the app had over 2 million young users worldwide. If parents/guardians are added to the mix, the number rises to 3.5 million. To attract young people, Revolut chose to speak their language. The UK-based fintech tells young people how they can "stash their spare change" to "smash their goals." It also offers financial education and tips for its young customers and their guardians, changing their tone and language based on the target audience.

Adopting a broader approach to business marketing is critical. Financial institutions must remember that finances are a key part of everyday life. Keeping the content digestible and attractive is as important as offering insightful inputs.

Know How to Market What

Content marketing is an ongoing process to build brand awareness. This helps customers look for you when a need arises. This also helps you make them aware of a need they might have been ignoring. In addition to ongoing marketing, don't leave any opportunity that arises as a result of events, such as industry news or a milestone the company achieves. Below are some ways for ongoing and event-triggered content marketing:

Ongoing Content Marketing Strategy



Trust Building

- ▶ Social media posts
- ▶ Reports
- ▶ Business and industry insights
- ▶ Customer testimonials



Educational Content

- ▶ Infographics
- ▶ Videos
- ▶ Blogs
- ▶ Whitepapers



Product and Services Awareness

- ▶ Informative blogs and articles
- ▶ How to videos
- ▶ Quizzes and AMAs
- ▶ Influencer collaborations



Reward and Loyalty Programs

- ▶ Social media
- ▶ E-mails
- ▶ Direct Messages

Event-triggered Content Marketing Strategy



Product/Service Launch

- ▶ Targeted Ad Campaigns
- ▶ Social Media
- ▶ Webinars
- ▶ Explainer Videos



Major Industry Event

- ▶ Infographics
- ▶ Videos
- ▶ Blogs
- ▶ Whitepapers



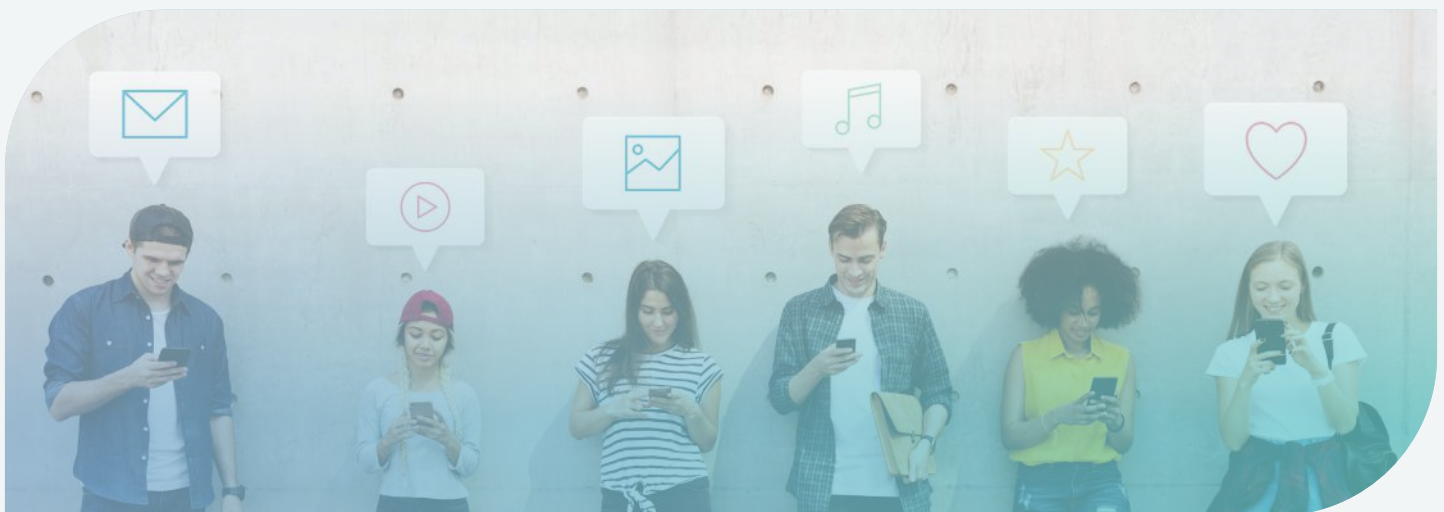
National/International Occasions

- ▶ Social Media
- ▶ Discussion Forums
- ▶ Storytelling Blogs
- ▶ Gamified Experiences



Business Milestones

- ▶ Press Releases
- ▶ Billboards
- ▶ Social Media
- ▶ Business Reports



Content Marketing Trends to Hop On in 2025

The content marketing landscape in India is rapidly evolving. A few trends that financial institutions can ride on include:

Video Marketing

From trending reels to product explainers, video consumption in all forms is increasing.



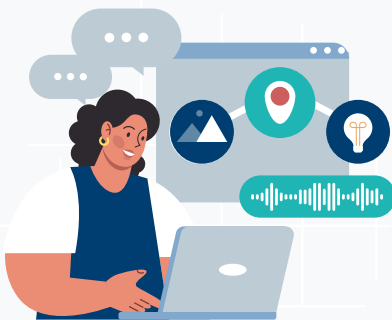
User-Generated Content

Users enjoy little instances of fame. Give them the chance with interactive content, gamified campaigns, and re-shares to boost engagement and brand awareness.



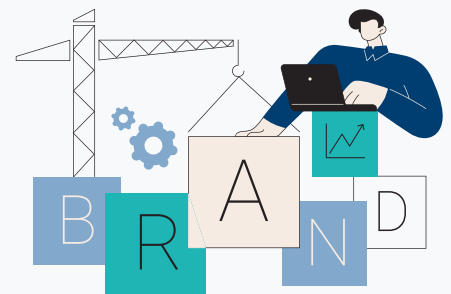
Content Localisation

Tailoring content to local festivals and using popular local songs and slang positions your brand as one that “belongs.”



Sustainability

Strike a chord with the conscious customers by spreading the message about the sustainability initiatives of your brand. If you don't have one yet, launch one.



Conclusion

Did you know that 48% of content marketing is outsourced and that 31% of B2C marketers spend at least half their marketing budget on content marketing? Ensuring that your marketing budget is utilised well is a challenge for financial organisations that might not have the expertise or tools to maximise their marketing potential. Having the right partner, who can strategize, execute, and optimise ROI, can help you get the best results from your content marketing efforts.

Veda Informatics understands that regulatory restrictions make navigating the marketing maze a challenge. Establishing brand leadership in the niche finance industry requires experience and expertise.

37%
of financial institutions lack the resources to create impactful content.



Request for samples to learn how our team has helped financial institutions with exceptional marketing strategy and content for more than two decades.

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