

November 2014

Living Ratings of Digital Intelligence

In search of #DigitalAlpha: Digital content and communication in the world's leading asset managers

Asset Management is defined as the “coordinated activity of an organisation to realise value from assets.” In turn, assets are defined as an “item, thing or entity that has potential or actual value to an organisation.” There’s no doubt that the leading asset managers are expert at managing financial assets. But what about their digital assets? Are these same firms realising any value from the internet or social media?

Asset managers failing a growing mobile audience

Between 2010-2013 visits to websites from mobile devices more than doubled. This is a trend that is set to continue in 2015. Yet, just four of the fifty firms we rated use responsive web design features in their websites. What's more fewer than a third of the firms we rated offer a dedicated mobile version of their website. These firms risk disenfranchising a growing number of people who use their smart phone or hand-held device to browse and research the web.



Just 8% of firms offer a truly device-agnostic web experience.

Rating digital content and social media communication of the top fifty asset managers* Living Ratings top 20 ranking

*According to Investment & Pensions Europe Top 400 Asset Managers, June 2014.

INDUSTRY RANK	LIVING RATINGS	FIRM	% SCORE
4	1	Fidelity Worldwide Investments	76%
34	2	Schroders	74%
36	3	MFS Investment Management	69%
1	4=	BlackRock	68%
20	4=	T.Rowe Price	68%
35	4=	Credit Suisse	68%
25	7	TIAA-CREF	67%
7	8	PIMCO	66%
12	9	Northern Trust Asset Management	63%
17	10	Invesco	62%
16	11	Goldman Sachs Asset Management Int	61%
18	12=	AXA Investment Managers	60%
2	12=	Vanguard Asset Management	60%
42	14	Federated Investors	59%
37	15=	New York Life Investments	58%
48	15=	Columbia Management	58%
8	15=	Deutsche Asset & Wealth Management	58%
14	18=	Natixis Global Asset Management	57%
6	18=	J.P. Morgan Asset Management	57%
13	20	Franklin Templeton Investments	56%

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To talk with our team about any of the issues in this study or organise a meeting to discuss how you could benefit from developing a digital brand content and social media communications strategy please contact Abigail Vyner : abigail.vyner@living-group.com

Website content ahead of social media in leading asset managers

With the exception of the asset management firms that lead our study the majority are failing to differentiate themselves through either an effective digital presence, client-centric user experience, relevant branded content, unique visual branding or clear messaging.

Asset managers are embracing digital communication

Across all nine Living Ratings categories our analysis shows clear evidence that asset managers are committed to digital communication. Whether it's websites or social media the leading firms in our study are using branded content, client-centric user experience and dynamic functionality to enhance their digital corporate communications.



Just four asset managers utilise responsive web design features in their website.

Social media strength building

Channels such as LinkedIn, Twitter, YouTube, Facebook and Google+ feature strongly in the communications mix as asset managers look for additional ways to optimise their marketing and business development activities. However, just 50% of asset managers social media channels are led by a client-centric approach to content. The others are dominated by self-promotion, industry accolades or employee communication.



60% of asset managers demonstrate a client-centric approach to navigation and content.

Social media and website performance at a glance

Top 50: Social media

- 11 promote social media links on home page
- 29 have a live Twitter channel
- 38 feature LinkedIn
- 15 use Facebook
- 31 have a dedicated YouTube channel
- 19 use Google+
- 17 feature a Blog on their websites
- 18 link to audio and video as part of their social media
- 17 offer some kind of client app
- 41 failed to respond to our Twitter enquiry within 24 hours

Top 50: Web communication

- 4 feature responsive web design (RWD)
- 15 offer a dedicated mobile website
- 29 provide a functioning search facility
- 30 take a client-centric approach to navigation and content
- 20 take an "About Us" approach to navigation and content
- 25 use information graphics to support text and detail
- 14 link website content to social media
- 25 feature video or audio content

The top performers

Each of the five firms that lead our ratings delivers a unique and impressive digital experience.

- | | |
|--|-------------------------------|
| 1 Fidelity Worldwide Investments | 4 BlackRock |
| 2 Schroders | 5 T. Rowe Price |
| 3 MFS Investment Management | |

On pages six to eight we've highlighted three case studies that offer useful insight into how digital brand content and social media communication can form a key part of any asset manager's corporate communications suite.

Big is not always better

IPE RANK	FIRM	LIVING RATINGS
4	Fidelity Worldwide Investments	1
34	Schroders	2
36	MFS Investment Management	3
1	BlackRock	4=
20	T.Rowe Price	4=
35	Credit Suisse	4=
25	TIAA-CREF	7
7	PIMCO	8
12	Northern Trust Asset Management	9
17	Invesco	10

Key performance indicators

Website functionality

Search functionality is a tool that's seriously neglected on nearly half of the websites we rated. Either the search wasn't working or they rely on the corporate parent's website. Detailed predictive search responses are entirely absent.



Responsive web design (RWD) means that when the user's browser window changes size or shape the website's content changes with it. This ensures an optimum viewing experience whatever the device. Just four of the fifty firms we rated utilise RWD on their websites.

Dedicated mobile website Less than a third of asset managers provide a website that is optimised for mobile devices. This, and the lack of RWD means that nearly two-thirds of asset managers have a website that will not view properly on a mobile device.

Search Engine Optimisation (SEO) techniques are numerous and vary in complexity. Using readily available 'View Source' functionality, our analysis reveals that over half of asset managers have no embedded keywords – the simplest kind of SEO – in their home page html coding.

Who's Tweeting or on LinkedIn?

Together these fifty firms boast over four million followers on LinkedIn and Twitter.

LinkedIn is the most popular social media channel. More than three quarters feature a live and up-to-date LinkedIn page or pages with updates, links to blogs and announcements.

YouTube is the second most popular channel with 31 firms showcasing a host of high quality video content.

Twitter comes a close third; more than half of the firms we surveyed utilise a live Twitter feed. However given Twitter's popularity it is surprising that just nine of these firms responded to a query we tweeted. Given the prevalence of all prime social channels, Twitter, LinkedIn, Facebook, and YouTube, it's puzzling to find that less than a quarter of asset managers feature social media links on their website home page. This supports our view that there exists a clear disconnect between social media and web communication in the corporate space.

Blog. Ugly word, powerful resource Although less than half of the asset managers in our study feature a blog, those that do are of a very high quality and feature the latest expert insight and thought leadership. There is a clear correlation between blog quality and overall digital performance in our study.



Content analysis

Content – is it a mirror or a window?

When we analyse web and social media content we look for evidence of a substantive, branded, client-centric approach to communication. Too often, social media communication is inward-facing. Outstanding communicators offer it as a resource; they don't use it as a repository.

Clients come first. Or do they?

"Clients come first" is a familiar mantra across asset management websites and social media. But it not matched in reality as our analysis reveals an almost equal split between those asset managers who take a client-centric approach to navigation and content and those whose primary focus is "About Us".

Telling or selling?

No one responds well to a hard sell; least of all a sophisticated buyer. Engaging storytelling appeals to our curiosity and our desire to find out more. Among the firms we rated there's a straight 50:50 split between those who have taken the time to weave an engaging narrative (with case studies and real-life examples) and those who appear to have cut 'n' paste the fund sales manual into their communications.

More than words can say

Fewer than half of asset managers use the tools of design – engaging information graphics, typography, imagery – to support the written word. They appear to forget that it's Amazon's Kindle that was designed for lengthy e-reading, not corporate websites.

Looking for a career in asset management?

If you are, don't bother looking at the website. Just under half of asset managers feature any kind of graduate focused content. Social media won't help much either; unless you want to know who they just hired.

Achieving #Digital Alpha: Three key challenges for asset managers

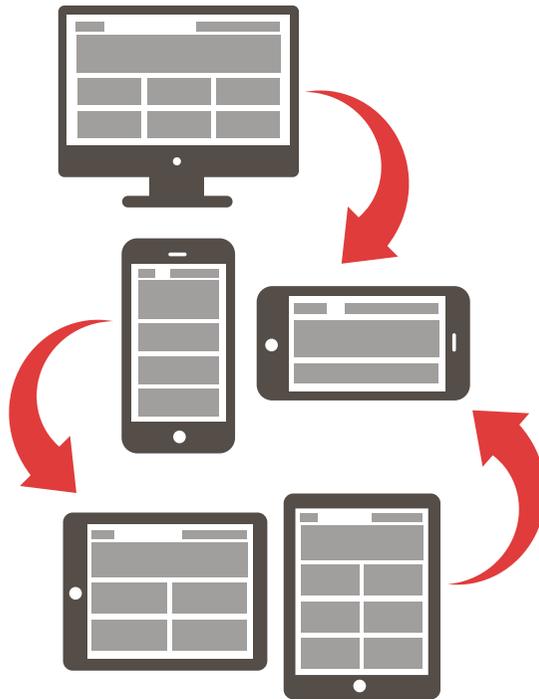
Challenge #1: Reaching out to a growing mobile audience.

A website with Responsive Web Design ability adjusts to fit the actual screen size of the device that people are using.

Think of screen content as liquid in a cup or a bottle – the content, the text, titles and the images actually move so that they fit within the size of that specific screen, whether it's a tablet or an iPhone or an iMac or a PC desktop. Users can see the adjustments happen as the browser size shifts from one size to another. Responsive design delivers some very important business benefits:

- Multi-device adaptation
- Easy maintenance
- Improved SEO
- Higher customer conversion
- Increased mobile sales leads
- Seamless user experience

Clearly, the arguments in favour of responsive web design go way beyond simple aesthetics. So why are so few asset managers using it?



Challenge #2: Clients first – it's time to walk the talk.

Like many firms in the wider professional services sectors, many asset managers talk passionately about how clients are their number one priority; "Clients come first" is a familiar refrain. Too often though, rhetoric is not matched by reality.

- Despite huge advances in both website structure and navigation "About Us" remains the priority. Client-centric, issue or insightful, sector-related content appears way down the agenda.
- Too often, social media content and messaging is lazy, recycled third party content. There's an over-reliance on announcing new hires, employee activities or industry accolades. Where's the relevant, client-related insight or thought leadership?



Challenge #3: Content; it's time to make it king.

All asset managers are in a fight for share of mind and share of wallet among their audiences; whether they are investors or graduates. Websites, social media, microsites and blogs are now key battlegrounds. Relevant, engaging and insightful content is key to success and has the ability to unite all the digital channels. However the average score for web content in our study is just 6/10.



Company selection and Living Ratings criteria

Our analysts undertook detailed analysis of the top fifty asset management firms, from the IPE's Top 400 Asset Managers, published in June 2014.

Our research and analysis was undertaken in September and October 2014.

There were nine categories of rating criteria, a total of 200 points was available.



Website functionality (30 points)

Scoring the quality of a website's search, responsive web design features and mobile capability.



Keyword SEO (12 points)

Using standard 'View Source' functionality we scored the number of embedded keywords found in the html coding of website home pages.



Google coverage (15 points)

Using the media or announcements sections of a firm's website we performed a corresponding Google search to determine how well the announcement is covered on the internet.



Web content (10 points)

The client-centric nature, presentation and engagement of web content and its alignment with a firm's brand.



Social media presence (13 points)

The number of channels a firm is using for social media, sharing, blogs and client apps.



Social media brand content (10 points)

The client-centric nature, presentation and quality of social media content and its alignment with a firm's brand.



Twitter frequency (5 points)

The consistency of a firm's Twitter output.



Twitter response (5 points)

The time taken to respond to a Tweeted enquiry.



Social media influence (100 points)

According to kred.com, "Your Kred story shows off your most influential content". Every firm or person on Twitter has a Kred score made up of Influence and Outreach. Influence goes up when somebody mentions, retweets or replies to you. Outreach increases when you mention, retweet or reply to someone else.

#1 Living Ratings Case Study

Fidelity Worldwide Investments

Putting the user in total control.

“It’s punchy, it’s in your face, it’s consistently simple. That’s why it’s so smart.”

Living Group

www.fidelity.co.uk

Fidelity offers an outstanding suite of digital communications designed to put the user in total control. “Take control of your retirement”, or your New ISAs, SIPPs or Investment Funds. Fidelity succeed by controlling every pixel of their digital real estate for the benefit of their users. As they say; “the needs of our clients have always steered our decisions.”

Fidelity say “We are purely and simply investors.” And this website is designed purely and simply for investors. Whether it’s on a desktop or mobile device they deliver this promise with a range of features and benefits; numerous home page links to every aspect of the investment space; industry-leading technology and market research. Access is enabled by thoughtful and client-centric navigation; “Get Started”, “New ISAs”, “Pensions and Retirement”, “Markets and Insights”. They even have an app to “Customise your mobile experience with Fidelity’s new app for the iPhone and iPod Touch.”

Wherever you access Fidelity; at your desk, on the move, on Twitter or YouTube, it’s punchy, it’s in your face, it’s consistently simple. That’s why it’s so smart.

Twitter

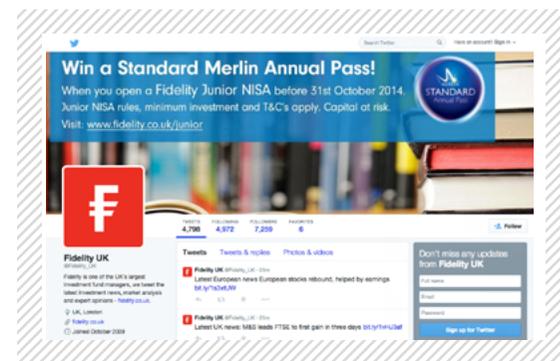
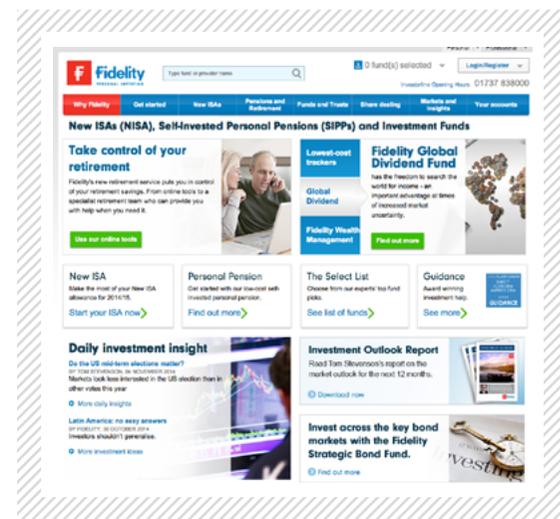
@Fidelity_UK Fidelity tweet the latest investment news, market analysis and expert opinions and link you to bespoke website content that’s optimised by simple but smart design, typography and info-graphics. Interested in what’s happening right now in today’s investment markets? Follow Fidelity.

YouTube

Whatever you need to know, however you want to invest; whether you are a graduate seeking career guidance or a few years older and needing retirement investment advice, there’s an informative up-to-date video on the topic on Fidelity’s dedicated YouTube channel.

Facebook

Fidelity’s Facebook pages combine industry-leading insight with an accessible retail offer with consummate ease. Want to know how “October lives up to its reputation as Volatility returns in the year’s traditionally most nervous month”? Or do you want to know more about a Junior NISA? This is a case study in how to deliver rich, relevant content in a visually engaging way while appealing to a wide range of investor types. Not an easy thing to do.



#2 Living Ratings Case Study

Schroders

Reshaping tradition with digital innovation

“If a 200 year old company can deliver such a high levels of digital content and engagement why can’t every firm?”

Living Group

www.schroders.com

Schroders brand combines “Trusted Heritage” with “Advanced Thinking” to deliver distinctive digital communication. They walk the talk too. They are one of just a handful of asset managers to use the latest responsive web design techniques to optimise the user experience. The result – whether you are at your desk or on your mobile – is highly impressive and ultra-reassuring. As a “dynamic organisation that prides itself on its innovation and specialisation” they combine style and simplicity to deliver focused asset management, wealth management and investor relations content within the relative confines of consistent and clear visual identity.

If a 200 year old company can deliver such a high levels of digital content and engagement why can’t every firm?

Twitter

@Schroders streams branded market insight and research direct to its followers who benefit from a regular supply of insight and inspiration. It’s refreshingly different from the majority of generic and recycled tweets that dominate the sector.

LinkedIn

“Turbulent times in technology”, “Global economic update”, “60 seconds with...” Schroders’ Head of Investment are just a few of the rich media links provided as part of a regular stream of updates. It’s strongly branded and is much more than just a mirror of Schroders’ Twitter stream.

Blog

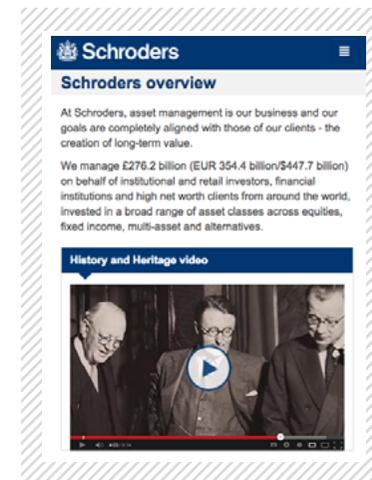
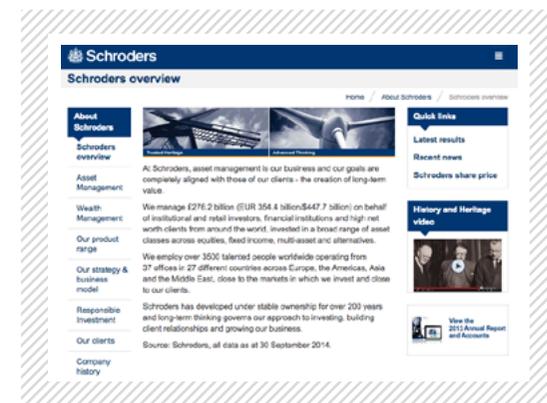
As part of Schroders’ news section, “60 seconds with...” key figures including Chief Economist Keith Wade and Tom Walker, Head of Global Property Securities, is a valuable resource featuring insightful commentary on the issues of the day.

YouTube

Schroders’ Home, Videos, Playlists, Channels and Discussions pages on YouTube are all packed full of high quality video content. From investment forecasts to charitable activities, from market views to careers insights this is one of the richest and most varied collections of video content among asset managers today.

Facebook

Refreshingly, for the sector, Schroders’ Facebook page avoids the temptation to simply duplicate content from Twitter and YouTube. Their “Our heritage, your future” Facebook pages are dedicated to promoting graduate opportunities at the firm. It features a timeline with video, links, advice and insight. It could do with an update though...



#3 Living Ratings Case Study

MFS Investment Management

Drawing insight from information

“A website that’s low on text and high on engagement, access and innovation.”

Living Group

www.mfs.com

This is a website that’s low on text and high on engagement, access and innovation. MFS really do walk the talk... “We are a different kind of global investment manager”. It’s difference with a purpose though.

In what could be described as a template for the modern user experience it uses responsive web design to deliver key information to users via a concise five-point navigation and what is in reality a single page website. Short paragraphs on “What we do”, “Insights”, “Culture”, “History” are supported by multi-point opportunities to “Learn More”. MFS have the confidence – and the user insight – to know that less really does mean more.

Click on the “Insights” link and you’ll find white papers, “on the lookout” blogs on key points of interest. MFS’s impactful visual identity and typography are well-suited to this minimal approach to gaining maximum user engagement – whatever device you are using.

LinkedIn

Leading with a banner announcing “There is no expertise without collaboration” and MFS’s stand out black, red and white visual identity, their LinkedIn pages cover a range of relevant insights in words and pictures. The primary focus is on investment management updates; it’s a simple thing but it does it well.

YouTube

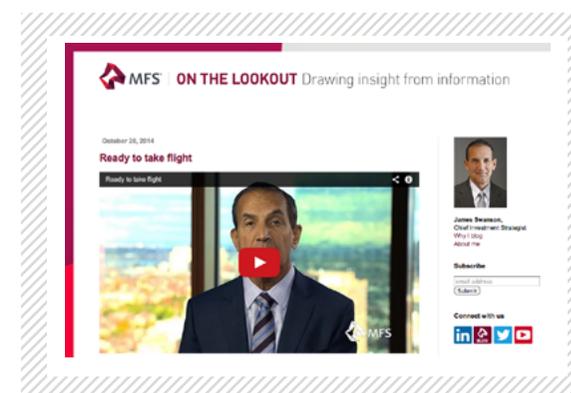
Check out MFS’s dedicated YouTube channel and you’ll see just how well the visual identity works in a digital setting such as this. It really catches the eye and provides the perfect introduction to a library of high quality video content.

Twitter

It’s great to see how MFS have maximised their corporate identity and imagery for their Twitter profile. The timeline updates are full of colour, relevant links and posts, using images, info-graphics and commentary.

Blog

These blog pages are where the promise of “Drawing insight from information” is really delivered. Well-written, well-designed and well-presented the blog page is a library of insight and opinion by author James Swanson, Chief Investment Strategist. “So why do I blog?” he asks “A blog presents a perfect medium to keep investors up to date on what I have been discovering in my job as an investment professional. I want to share with readers what I learn along the way...” This gives the blog section a personal touch that is often promised but rarely delivered in many corporate websites.



Rating digital content and social media communication in the top fifty asset managers

Living Ratings top 20 ranking by total criteria

IPE RANK	LIVING RATINGS RANK	FIRM	% SCORE
4	1	Fidelity Worldwide Investments	76%
34	2	Schroders	74%
36	3	MFS Investment Management	69%
1	4	BlackRock	68%
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25	7	TIAA-CREF	67%
7	8	PIMCO	66%
12	9	Northern Trust Asset Management	63%
17	10	Invesco	62%
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18	12	AXA Investment Managers	60%
2	13	Vanguard Asset Management	60%
42	14	Federated Investors	59%
37	15	New York Life Investments	58%
48	16	Columbia Management	58%
8	17	Deutsche Asset & Wealth Management	58%
14	18	Natixis Global Asset Management	57%
6	19	J.P. Morgan Asset Management	57%
13	20	Franklin Templeton Investments	56%

Top 25 SEO and Google coverage

Scoring the quality of homepage keywords and Google coverage of a recent media announcement.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 27
1	MFS Investment Management	27
2	Schroders	25
3	T.Rowe Price	22
4	Macquarie Funds Group	19
5=	Mellon Capital Management	15
5=	Aberdeen Asset Management	15
5=	Insight Investment	15
5=	MEAG	15
5=	Sumitomo Mitsui Trust Bank	15
10	HSBC Global Asset Management	14
11=	PIMCO	12
11=	Aviva Investors	12
11=	Goldman Sachs Asset Management Int	12
11=	Natixis Asset Management	12
11=	Natixis Global Asset Management	12
11=	Wells Capital Management	12
17	BNP Paribas Asset Management	11
18=	Fidelity Worldwide Investments	10
18=	AXA Investment Managers	10
18=	BlackRock	10
18=	Columbia Management	10
18=	Federated Investors	10
18=	Invesco	10
18=	State Street Global Advisors	10
18=	Vanguard Asset Management	10

Top 20 website functionality

Scoring the quality of a website's search, response web design features and mobile capability.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 30
1=	Schroders	30
1=	Wellington Management Company	30
3=	MFS Investment Management	25
3=	Mellon Capital Management	25
5=	Fidelity Worldwide Investments	10
5=	APG	10
5=	Federated Investors	10
5=	Insight Investment	10
5=	Northern Trust Asset Management	10
5=	TIAA-CREF	10
11=	AXA Investment Managers	5
11=	BlackRock	5
11=	Credit Suisse	5
11=	Deutsche Asset & Wealth Management	5
11=	Franklin Templeton Investments	5
11=	Goldman Sachs Asset Management Int	5
11=	Invesco	5
11=	Legg Mason	5
11=	PIMCO	5
11=	T.Rowe Price	5

Top 20 social media presence

The number of channels a firm is using for social media, sharing, blogs and client apps.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 13
1	Credit Suisse	13
2=	Amundi	9
2=	Franklin Templeton Investments	9
2=	T.Rowe Price	9
2=	TIAA-CREF	9
6=	BlackRock	8
6=	Columbia Management	8
6=	Federated Investors	8
6=	Fidelity Worldwide Investments	8
10=	AXA Investment Managers	7
10=	Invesco	7
10=	Legg Mason	7
10=	Northern Trust Asset Management	7
10=	PIMCO	7
15=	MFS Investment Management	6
15=	Natixis Global Asset Management	6
15=	Schroders	6
18=	APG	5
18=	Deutsche Asset & Wealth Management	5
18=	Generali Investments Europe	5

Top 20 web content

The client-centric nature, presentation and engagement of web content and its alignment with a firm's brand.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 13
1=	Allianz Global Investors	10
1=	Columbia Management	10
1=	Credit Suisse	10
1=	Federated Investors	10
1=	Fidelity Worldwide Investments	10
1=	Insight Investment	10
1=	MFS Investment Management	10
8=	BNP Paribas Asset Management	9
8=	BNP Paribas Investment Partners	9
8=	Mellon Capital Management	9
11=	APG	8
11=	BlackRock	8
11=	Deutsche Asset & Wealth Management	8
11=	Dimensional Fund Advisors	8
11=	J.P. Morgan Asset Management	8
11=	Legal & General Investment Management	8
11=	Legg Mason	8
11=	Schroders	8
11=	T.Rowe Price	8
11=	TIAA-CREF	8

Top 20 social media brand content

The client-centric nature, presentation and quality of social media content and its alignment with a firm's brand.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 10
1=	Allianz Global Investors	10
1=	Columbia Management	10
1=	Federated Investors	10
1=	New York Life Investments	10
1=	TIAA-CREF	10
6=	Credit Suisse	9
6=	Fidelity Worldwide Investments	9
6=	Franklin Templeton Investments	9
6=	MFS Investment Management	9
6=	Schroders	9
11	Northern Trust Asset Management	8
12=	Amundi	7
12=	BlackRock	7
12=	Deutsche Asset & Wealth Management	7
12=	Invesco	7
12=	Natixis Global Asset Management	7
12=	T.Rowe Price	7
18=	AXA Investment Managers	6
18=	BNP Paribas Asset Management	6
18=	BNP Paribas Investment Partners	6

Top 20 Twitter frequency

The consistency of a firm's Twitter output.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 5
1=	AXA Investment Managers	5
1=	BlackRock	5
1=	Credit Suisse	5
1=	Federated Investors	5
1=	Fidelity Worldwide Investments	5
1=	Invesco	5
1=	Natixis Global Asset Management	5
1=	State Street Global Advisors	5
1=	TIAA-CREF	5
1=	Vanguard Asset Management	5
11=	Aegon Asset Management	4
11=	Allianz Global Investors	4
11=	BNP Paribas Investment Partners	4
11=	Franklin Templeton Investments	4
11=	Northern Trust Asset Management	4
11=	T.Rowe Price	4
17=	AllianceBernstein	3
17=	BNP Paribas Asset Management	3
17=	M&G Investments	3
17=	PIMCO	3

Top 20 social media influence

According to kred.com, "Your Kred story shows off your most influential content". Every firm or person on Twitter has a Kred score made up of Influence and Outreach. Influence goes up when somebody mentions, retweets or replies to you. Outreach increases when you mention, retweet or reply to someone else.

LIVING RATINGS RANK	FIRM	SCORE OUT OF 100
1	Goldman Sachs Asset Management Int	99
2	Vanguard Asset Management	96
3	PIMCO	95
4=	BlackRock	94
4=	New York Life Investments	94
6=	Fidelity Worldwide Investments	93
6=	J.P. Morgan Asset Management	93
8=	Credit Suisse	89
8=	Morgan Stanley Investment Management	89
10	TIAA-CREF	84
11=	Deutsche Asset & Wealth Management	83
11=	State Street Global Advisors	83
11=	UBS Global Asset Management	83
14=	AXA Investment Managers	82
14=	Invesco	82
16=	BNY Mellon Investment Management	81
16=	HSBC Global Asset Management	81
18	Franklin Templeton Investments	80
19	Northern Trust Asset Management	79
20	T.Rowe Price	78

Living Ratings delivers the evidence-based insight that enhances our understanding of our specialist sectors; financial, professional services, property, and technology.

About Living Group

Living Group specialises in integrated branding and communications

We help clients in the financial, professional services, property and technology sectors to enhance their corporate brands, communications and reputations.

Our team integrates industry expertise and insight with award-winning creativity, cutting-edge technology and outstanding client service. The outcome is brand, design, digital and marketing communications that are engaging, relevant and achieve results.

What's your score? Connect with us about planning or enhancing your digital & social media communication.

To find out the detail behind how you scored in our study or to organise a meeting to discuss how your firm could benefit from developing a social media and digital brand content strategy:



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Call us in London: +44 (0)20 7739 8899



Call us in Hong Kong: +852 3711 3100



Connect on Twitter: @LivingGroup



Website: www.living-group.com

To talk with our team about any of the issues in this study or organise a meeting to discuss how you could benefit from developing a digital brand content and social media communications strategy please contact Abigail Vyner : abigail.vyner@living-group.com