The Changing Role of Media for Financial Advisors

August 31, 2020

Executive Summary:



This research examines the growing role of media as an influencer of/for financial advisors. We start by assessing the current landscape of financial advisors, including how they spend their time and addressing some of the common hurdles they face in their day-to-day activities. Next, we examine the information sources currently used by financial advisors and identify the most important factors influencing their product and/or fund selections.

As media plays an increasingly critical role in influencing the behaviors of financial advisors globally, it has never been more important for asset managers to understand these dynamics and how to best connect with their FA clients.

Methodology:

In Q2 2020, Greenwich Associates conducted online interviews with 1,124 financial advisors across the world. Respondents were asked a series of questions about their consumption of different media sources, the operations of their financial advisory business, and differentiators in the decision-making process. This research study was commissioned by LinkedIn.

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