The Evolving Landscape of Investor Communications

Broadridge study of more than 1,000 North American investors reveals key insights into CX and communications as a means to more profitable, impactful and engaging interactions.

Improving CX and communications results in more profitable, engaging investor interactions.

Successful firms will find ways to bring simplicity, personalization and innovation to communications, creating the experiences their investors crave.

Broadridge can help.

Investors are moving to digital, but one in three will still want print in five years.

66% converted at least one statement or bill to paperless within the last year

TODAY IN 5 YEARS

51%

37%

69%

35%

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Investors are expecting more from the communications you send.

Statements are a valuable investor touchpoint that should not be overlooked.

Personal cloud storage offers investors ease and convenience.

Statements can also impact the bottom line when they include promotions and offers.

Consumers are increasingly willing to walk away from companies that provide subpar CX.

New technologies should be applied to create a richer digital experience.

Money-saving tips

Peers comparison data

Historical/comparative data

Financial management advice

To elevate the value of statements, investors want to see:

Highlight important information

Let me choose how to receive my communications

45%

41%

22%

12%

4%