

How To Captivate and Convert Younger Members with Digital Innovation

Presented By:

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CEO & Founder

&

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Sales Director

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Today's Thought Leaders

Meredith Olmstead
CEO & Founder



For 10+ years has led her team to design cohesive digital marketing, sales, and lending strategies designed for guaranteed results. Passionate about helping clients achieve lasting digital growth.

Danielle Fancher
Sales Director



With 13+ years in banking, she successfully increased ancillary product sales by over 600% at her last CU, and works with clients to help bridge the gap between marketing, lending, and retail teams.

Agenda Overview

» CAPTIVATING YOUNGER MEMBERS

- Data-Driven Strategies for Reaching Younger People Online
- Translating this Knowledge into Action for Your Institution

» CONVERTING YOUNGER MEMBERS

- Bridge the Gap Between Marketing Leads & New Account Conversions
- Breaking Down Silos and Fostering Collaboration

» REFLECT & PIVOT

» ACTION ITEM CHECKLIST



CAPTIVATING YOUNGER MEMBERS



Data-Driven Approaches for Reaching Younger People



Who Are They?



DIGITAL NATIVES

97% of Gen Z Own a Smartphone

85% Use YouTube &

76% Use Instagram Regularly

They have **NEVER** lived in a world without powerful mobile devices & internet access!

Source: eMarketer.com

CONSTANTLY CONNECTED



Avg **7.2 Hours** Screen Time Daily

40% of Gen Z Spends More Than
4 Hours a Day on Social Media

3/4 of American Teenagers Spend
their Free Time Online Primarily
Texting or Chatting



What Do They Like?



INTERACTIVE & MOBILE PREFERRED



They Expect
Seamless
Digital
Interactions



44%
are Willing
to Trade
Personal Data
for a More
Tailored
Experiences



They Prefer
Mobile
Devices
Over
Desktops



VALUE SOCIAL RESPONSIBILITY



69% More Likely to Buy from a Company that Supports Local Causes

But Some Recent Trends Show They Do **NOT** Want to Pay A Lot More for These Products and Services



Source: [dynamicsyield.com](https://www.dynamicsyield.com) and [mckinsey.com](https://www.mckinsey.com)

PERSONALIZED REAL-TIME EXPERIENCES

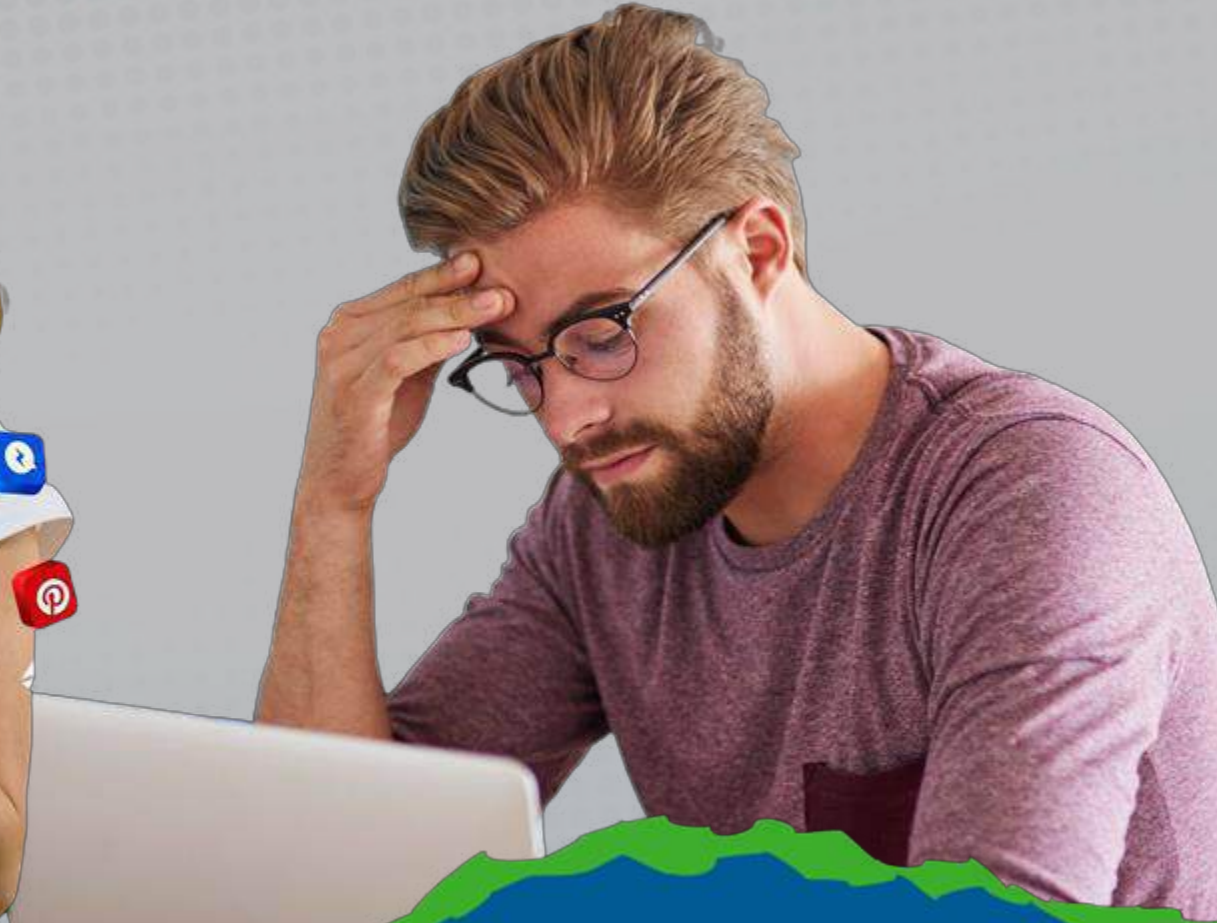
➔ **72%** of Consumers Only Engage
with Personalized Messaging

For Gen Z and Millennials, Personalization in
Marketing is Not Just Preferred; IT IS EXPECTED

➔ Nearly **85%** of Gen Z Consumers are Interested
in Receiving Personalized Offers from Merchants



How Do They Behave?



61%

of Gen Z Still Prefers to Interact with Real People, Even in a Digital-First World



NEED ADVICE WITH FINANCES

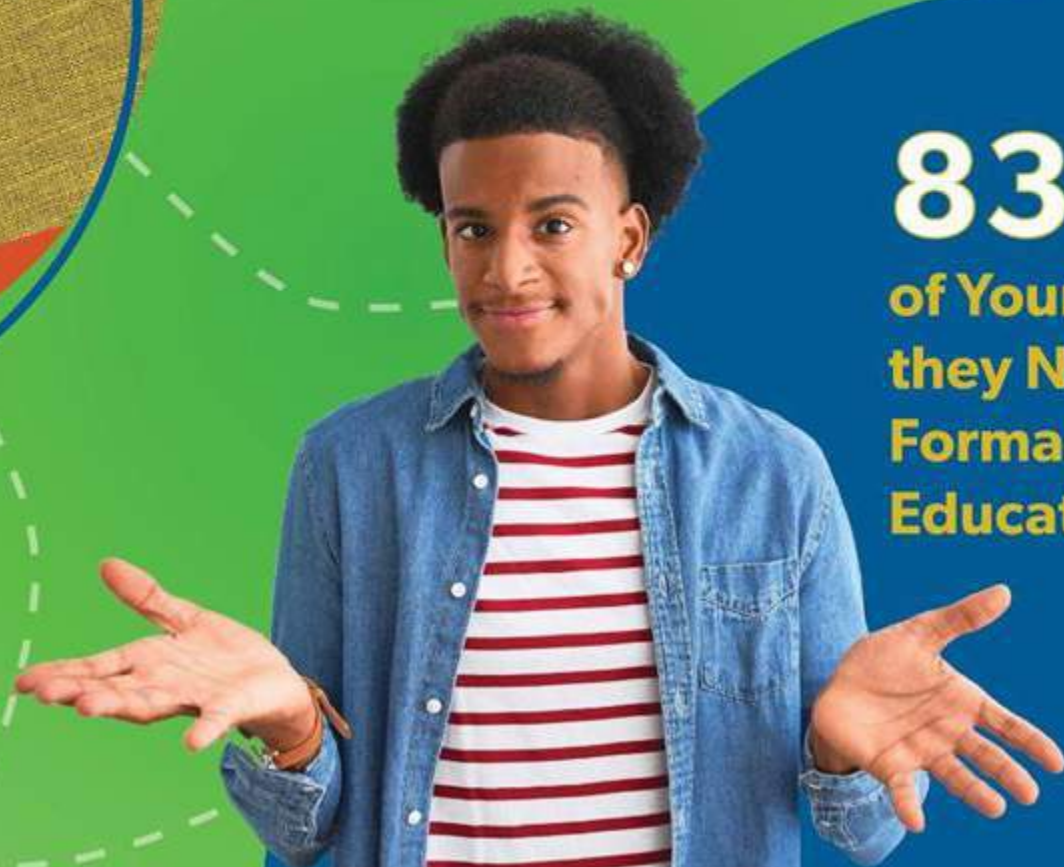


Financial literacy Rates Among Gen Z are Low



83%

of Young Adults Say they Never Received Formal Financial Education in School



USE SOCIAL MEDIA FOR HELP



79% of Americans Representing the Millennial or Gen Z Age Groups have Gotten Financial Advice from Social Media



76% Believe Financial Content on Social Media has Made it Less Taboo to Talk About Money

Source: Forbes

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FIND EMPOWERMENT ONLINE



62% Feel Empowered by their Access to Financial Advice on Social Media

Reddit and YouTube are the Most Trusted Platforms for Financial Advice

50% have Made Money as a Direct Result of Financial Advice they Received on Social Media





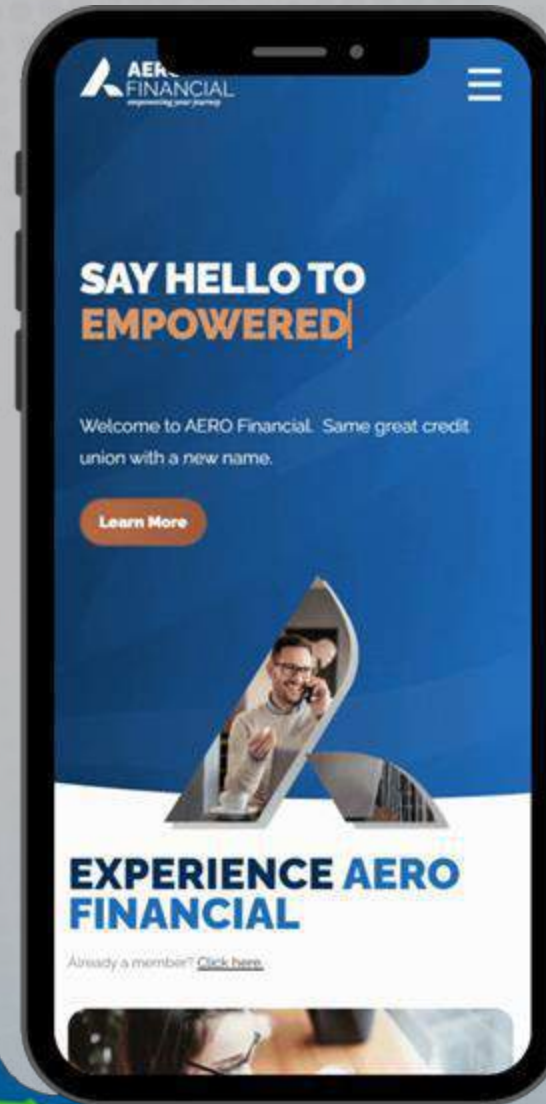
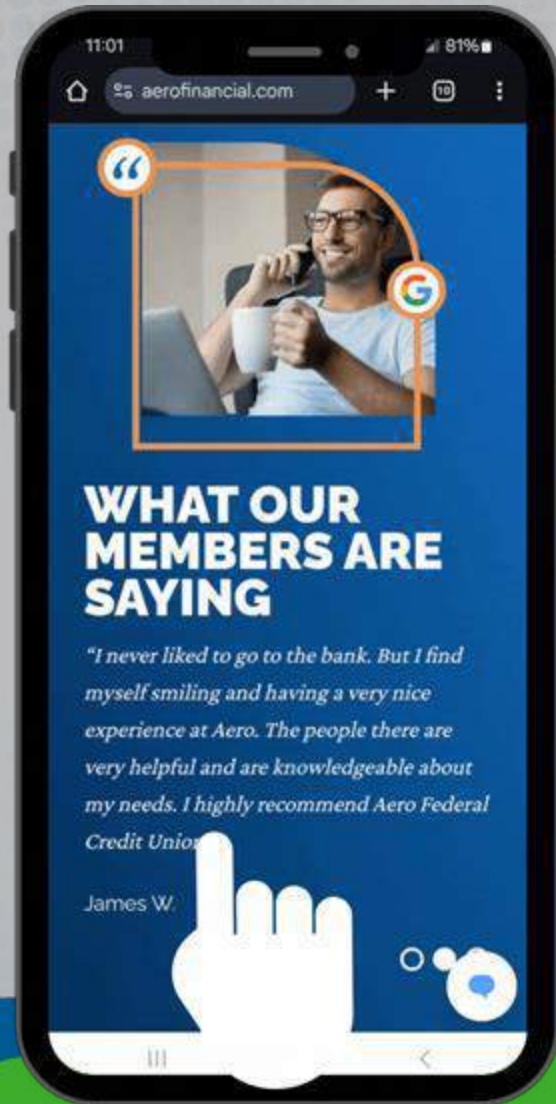
**Translating this
Knowledge Into
Action for Your
Institution**



How Can You Truly Captivate This Younger Audience?

- » Maximize Mobile Optimization
- » Engage with Short Form & Social Media Content
- » Target Paid Digital Ads on Younger Channels
- » Personalize ALL Digital Experiences
- » Streamlined & Timely Digital Interactions
- » Incorporate Social Responsibility
- » Cost-Conscious Strategies

Maximize Mobile Optimization



Short Form Content



Social Media & Influencer Content

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Target Paid Digital Ads on Younger

