

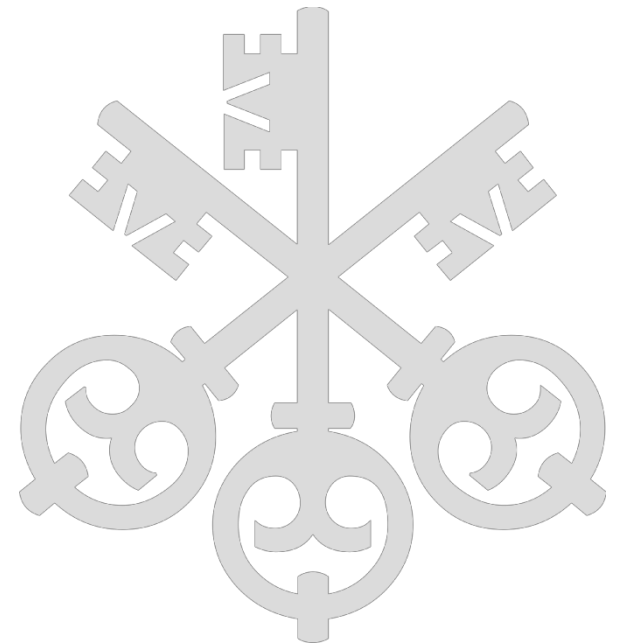


UBS @ WEF 2020

World Economic Forum Annual Meeting

January 21 – 24th 2020

Sustainable and Impact Investing
Cassie Carbaugh, Gillian Dexter, Christine Gugolz



UBS white paper for the 2020 WEF Annual Meeting

Becoming climate aware

Mobilizing capital to help meet climate change goals: **an investor's perspective**

Embargoed until the
20/01/2020 4.45pm
CET



External distribution



Press release: 4.45pm CET on the 20/01/2020

Press conference: 4.45pm CET on the 20/01/2020



External client emails on the following day 21/01/2020



Gateway article on the 21/01/2020



Social media campaigns:

WEF 2020 – AM campaign

WEF 2020 – Group campaign

Smartology campaign

ubs.com/wef-2020

(in UBS AM SI Insights page)

WEF 2020 - AM campaign overview



Overall goal – drive quality traffic to the landing page

Digital guerilla marketing campaign around WEF-2020.



Campaign objective

1. Brand awareness: positioning UBS as sustainable leader in asset management
2. Engagement: Social Media social actions e.g. likes, shares, comments; (Quality) website traffic from LinkedIn
3. Consideration: Download the WEF paper
4. Conversion: SI newsletter subscription



KPI(s)

- **Engagement:** Social media social actions, (quality) website traffic
- **Consideration:** White Paper downloads, Average Time spent
- **Conversion:** Lead Generation Form/ Contact us/ Newsletter subscriptions / Follow Michael Baldinger



Channel / Targeting

- Locations: Africa, Asia, Europe, LatAM, Middle East, North America, Oceania
 - Company industries: Banking,
 - Job functions: Business Development, Finance, Sales
 - Member interests: Banking, Sustainable Investing
- 27,000,000 LinkedIn members



AM Budget

USD 30'000 total:

- USD 20'000 for AM channel
- USD 10'000 Michael Baldinger campaign



Runtime

20 January 2020 - 10 February 2020

WEF 2020 – Group campaign overview



2020 objective

Showcase UBS's involvement in WEF and commitment to the SDGs



Implementation

- The campaign will cover several digital marketing and social media tools
- Organic content will be distributed through corporate channels social media (Facebook, LinkedIn, Twitter and Instagram) as well as Asset Management LinkedIn page.
- Paid campaign will be done on all the organic channels and google search engine
- As part of organic campaign, we will also activate our senior leaders' social media channel to promote their experiences and activities at the annual meeting
- Target markets will include the main brand markets, namely US, CH, UK, SG, HK



Channel / Targeting

- Media: Corporate Twitter and LinkedIn
- Live streaming: Corporate Twitter, LinkedIn and Instagram
- WEF white paper: All corporate channels (TW, FB, LI, IG) and google search



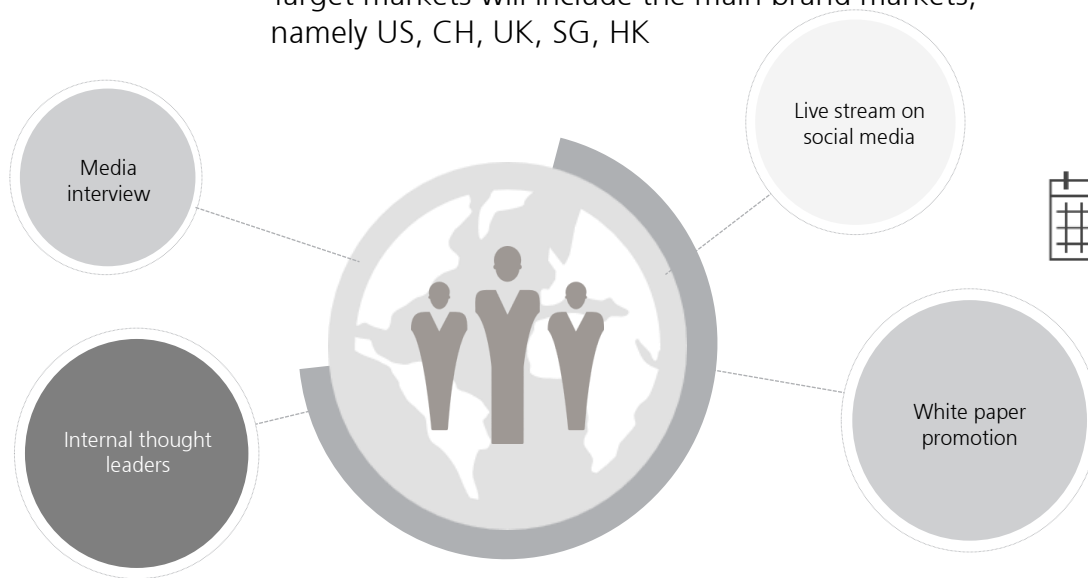
Group WEF Budget

- USD 30'000 total:
- USD 2'000 Media quotes
 - USD 5'000 Live streaming
 - USD 17'000 White paper
 - USD 6'000 Mix



Runtime

- Media: Corporate Boost for 5 days
- Live streaming: On the event day
- WEF white paper: Jan 21 - Feb 9



Campaign overview - Smartology



Overall goal

Digital guerilla marketing campaign to take ownership of climate editorial in association with the Davos Forum across premium financial news sites in Europe to promote WEF 2020.



Campaign objective

1. Brand awareness: positioning UBS as sustainable player in asset management by positioning UBS SI and climate content along side contextually aligned editorial articles covering the Davos debates.
2. Engagement: Advert and Content engagement, click throughs and dwell time on site
3. Consideration: Download of UBS WEF paper which will focus on 'climate aware' and other content consumption
4. Conversion: Newsletter subscription



Channel(s)

- Financial Times (including FTs Fund Mgt FTfm)
- CNBC
- Bloomberg



KPI(s)

- **Engagement:** Ad alignment to editorial score (content relevance), click through actions, (quality) website traffic
- **Consideration:** WEF Paper downl., Average Time spent
- **Conversion:** Lead Generation Form/ Contact us/ Newsletter subscriptions / SRI Social Follows



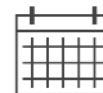
Targeting

- Locations: English speaking EMEA coverage including Geo ringfencing of Davos
- Audience: Institutional Investors, top-end wholesale via 1st party data to ensure no wastage
- Contextual: Smartology's machine learning AI will read UBS Asset Management's Institutional Davos Commentary across assigned and created content and match this semantically to related articles across the world's most premium publishers thereby making sure UBS Asset Management is front of mind before, during, and after the WEF



Budget

35,000 CHF



Runtime

16th January – 31st January

- Prior and during WEF 2020 (21st-24th Jan)
- Post WEF – 24th January onwards

Client and user experience

Attention

Interest

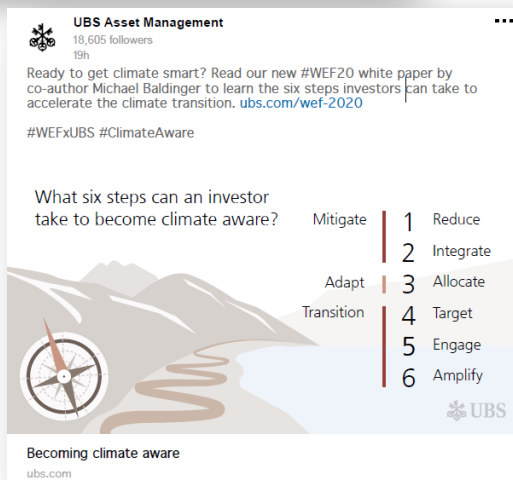


Desire

Action

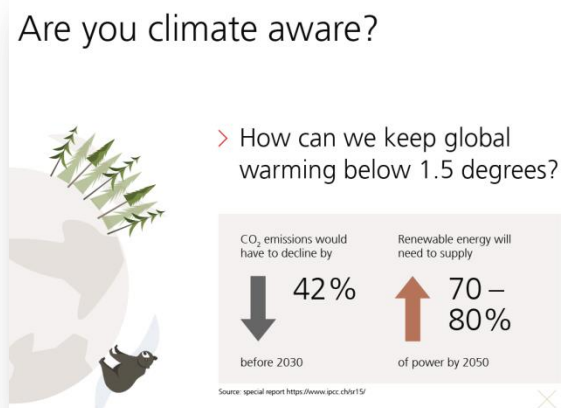
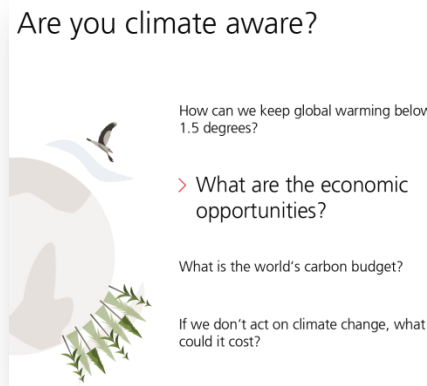
Targeted and organic LinkedIn Posts

Amplified from AM showcase page, thought leader Michael Baldinger and AM Digital Rockstars



Interactive landing page

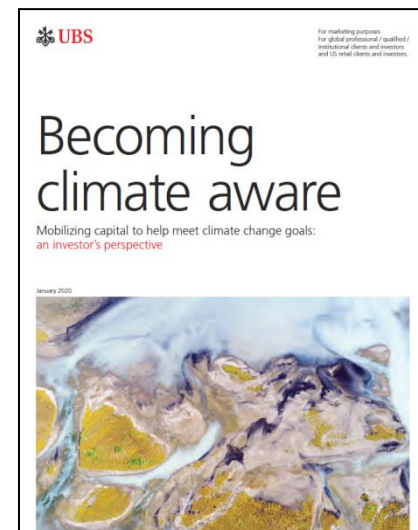
You can complete a short engaging quiz to find out if you are climate aware as well as download the white paper



Like, share and follow us on LinkedIn

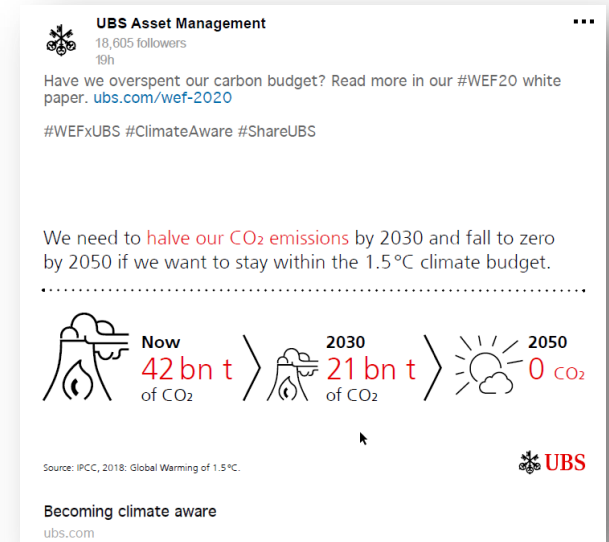
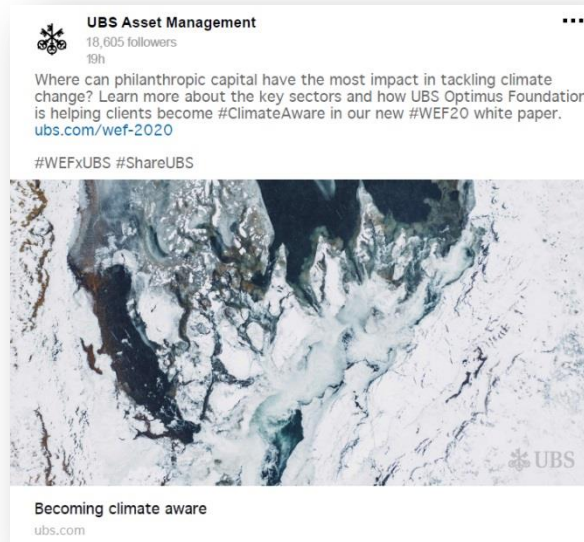
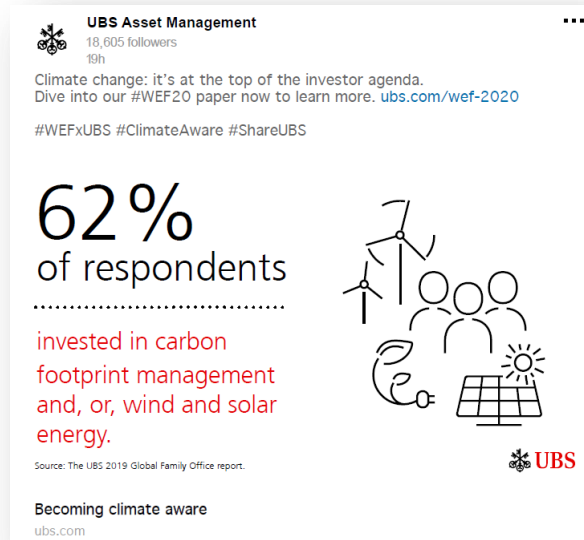


Downloading the white paper



Download Becoming climate aware report

AM group assets posts pre, during and post the WEF



WEF 2020 (Always on) white paper campaign


UBS Asset Management
18,605 followers
19h

What is needed to keep to a 1.5°C world? The answer lies in transitioning portfolios. Read our latest #WEF20 paper now to find out more. ubs.com/wef-2020

#WEF20UBS #ClimateAware

To keep to 1.5°C

CO₂ emissions would have to decline by **45%** before 2030 + renewable energy will need to supply **70-80%** of power by 2050



Source: special report <https://www.ipcc.ch/sr15/>

Becoming climate aware
ubs.com

UBS Asset Management
18,605 followers
19h

Dive into our new #WEF20 paper to learn how collaborations can make the difference. ubs.com/wef-2020

#WEF20UBS #ClimateAware #ShareUBS

In a time of regulatory uncertainties and challenges to scaling climate finance...



... investor partnerships have never been so critical.

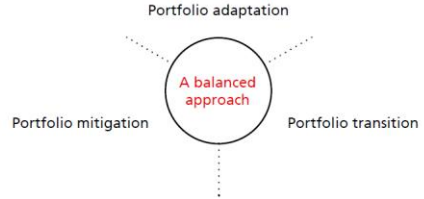
Becoming climate aware
ubs.com

UBS Asset Management
18,605 followers
19h

Our research shows that investors want to use their capital in a climate-smart way to help close the climate gap. Explore our investor-oriented approach today in the #WEF20 white paper. ubs.com/wef-2020

#WEF20UBS #ClimateAware

A climate aware framework for investors



Source: UBS Asset Management. When we named the characteristics we deliberately borrowed from the scientific taxonomy of the low-carbon transition, as we believe these terms are particularly relevant to our methodology.

Becoming climate aware
ubs.com

UBS Asset Management
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19h

We can all see the effects of climate change, but what does it mean for investment portfolios? Follow @Michael Baldinger to find out more. ubs.com/wef-2020

#WEF20UBS #ClimateAware



Becoming climate aware
ubs.com


UBS Asset Management
18,605 followers
19h

What could decisive climate action before 2030 achieve? Read our brand-new #WEF20 white paper now to find out. ubs.com/wef-2020

#WEF20UBS #ClimateAware

USD 26 tn
of economic benefits

could be delivered due to **decisive climate action** between now and 2030.



Source: Unlocking the Inclusive Growth Story of the 21st Century <https://newclimateeconomy.net/publications/2018>

Becoming climate aware
ubs.com

UBS Asset Management
18,605 followers
19h

Our Swiss real estate business manages CHF 23 billion in assets. Find out why they are thinking about tomorrow, today. Learn more in our #WEF20 white paper. ubs.com/wef-2020

#WEF20UBS #ClimateAware

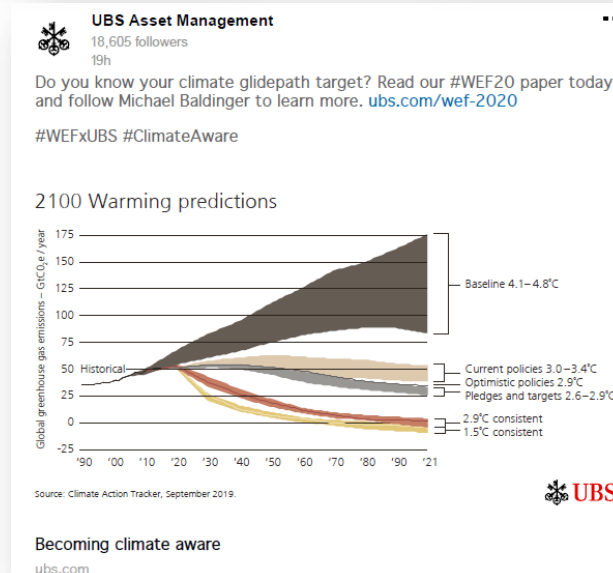


G R E S B
★★★★★ 2019

GRESB has certified the strong performance of our Swiss real estate's business sustainability strategy.

Becoming climate aware
ubs.com

Michael Baldinger posts pre,during and post the WEF



Key event and campaign summary highlights

1,860
investors

1,860 investors in attendance

100
speakers

100 expert speakers at event

459,621
impressions

459,621 LinkedIn users saw
Always On and Michael Baldinger
paid campaigns

4,312
clicks

4,312 clicks were made in order
to read underlying website
material

650
downloads

650 downloads of the SI
handbook during event

83
subscriptions

83 people subscribed to SI
newsletter during the event



Appendix

World Economic Forum

Overview

Mission

The Forum engages the foremost political, business, cultural and other leaders of society to shape global, regional and industry agendas.

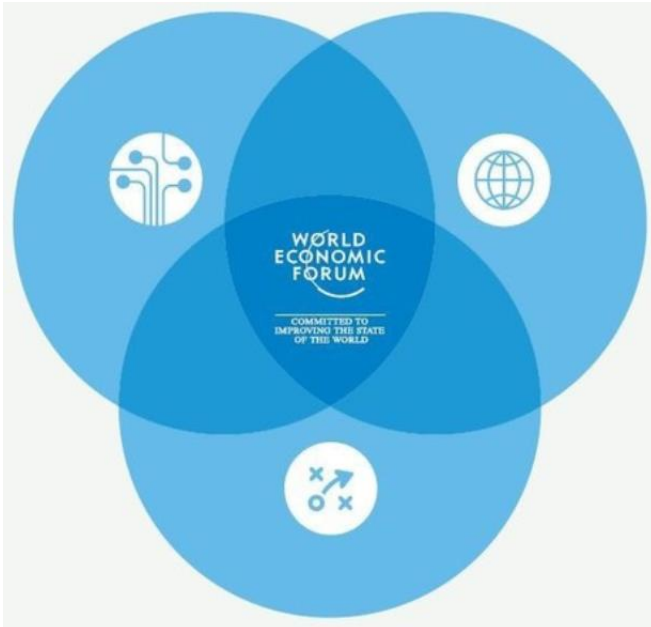
Why does their work matter?

As an international organization with no commercial interest, the Forum provides a platform for leaders from all stakeholder groups from around the world – business, government and civil society – to come together.

What makes them unique?

Deeply anchored in the public and private sectors, the Forum is the only global organization serving this role, bringing together the foremost political, business, cultural and other leaders of society in an impartial space with the aim of driving positive change.

Key areas of focus



Forum activities take place at the intersection of three focus areas:

- 1. Mastering the Fourth Industrial Revolution**
- 2. Solving the Problems of the Global Commons**
- 3. Addressing global security issues**

The Forum believes that potential for positive global change exists at the intersection of these three challenges, and that progress will come through bringing together leaders from all walks of life to forge common understanding, purpose and, where appropriate, action.

WEF: Sustainability

Leading by example: their responsibility

Our commitment

The Forum commits to being a leader in practicing sustainability.

The Forum brings together leaders of society to address the world's most pressing challenges. This has an impact on the environment. It is our responsibility to mitigate these impacts, another way of fulfilling our mission to improve the state of the world.

Our approach

The Forum aims to ensure the highest level of sustainability for its offices, improving the sustainability performance of its events, and integrating sustainability practices in its business and global operations. The Forum has its own Sustainability Strategy 2021, Sustainability Policy, Sustainable Procurement Policy and much more published on their website.

Our actions

Our other projects

This is how the Forum wants become more sustainable:

LEED-certified offices, Sustainable green spaces, Sustainable catering, Reducing paper use, Moving away from single-use plastic, Energy leadership, Sustainable Commuting, Renewable energy, Responsible sourcing, Recycling

Sustainability at the Annual Meeting in Davos

The Forum brings together stakeholders to help address the greatest ecological crisis of our time at the Annual Meeting in Davos. We recognize that in offering these platforms, we consume finite resources and cause emissions. We take the utmost care to mitigate our environmental impact and we were awarded the ISO 20121 certification for sustainable event management.

World Economic Forum Annual Meeting

21 – 24th January 2020 in Davos-Klosters, Switzerland

Davos 2020 Stakeholders for a Cohesive and Sustainable World

The World Economic Forum Annual Meeting in Davos-Klosters is the foremost creative force for engaging the world's top leaders in collaborative activities to shape global, regional and industry agendas at the beginning of each year. In this regard, the Forum's mission – improving the state of the world – guides the design and development of the Annual Meeting objectives.

7 Themes

Fairer Economies

Healthy Futures

Better Business

Future of Work

How to Save the Planet

Tech for Good

Beyond Geopolitics

560 Public Speakers

148 Webcast Sessions

Stakeholders in Davos

- Chief executives and chairs of our 1,000 Partner and Member companies actively engaged in the International Business Council, Community of Chairpersons, Industry Governors, Regional Business Councils and Stewardship Boards
- More than 250 political leaders from the G20 and other relevant countries and heads of international organizations engaged in high-level dialogues facilitated by the Informal Gathering of World Economic Leaders (IGWEL) program
- Members of our Global Future Councils, Expert Network and Global University Leaders
- Technology Pioneers, the Community of Global Shapers, the Forum of Young Global Leaders and the Schwab Foundation for Social Entrepreneurship