

# Robo-Advisors Global Market Segmentation and Major Players Analysis 2022

*Self-Directed Investors: Implications for Wealth Managers; Understanding how self-directed investment affects the wealth management industry.*

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## Summary

The wealth management industry has long been resilient to the digitization process observed in the wider financial services space. This has started to change, however, with interest in robo-advice platforms increasing in 2015. The automated investment management space is hence becoming ever-more competitive as new entrants launch propositions. Supported by software developers, traditional wealth managers have also started exploring the digital advice market. Competition will thus increase further, although robo-advisors are still looking for business models that will appeal to HNW individuals.

## Key Findings

- Regulators have not been able to keep up with the growing popularity of automated advice solutions. This creates an opportunity for industry leaders to have a direct impact on how the regulatory environment around robo-advice is designed.
- The US is the home market of low-cost robo-advice, as [self-directed investors](#) are driven by price sensitivity above all else.
- New entrants across the globe are introducing innovations to the automated advice space.
- Most wealth managers focused on the HNW segment do not consider robo-advisors a threat to their business, as the wealthiest individuals show limited interest in robo-advice.
- Robo-advisors that emerged as startup companies will partner with incumbents to attract more assets to their platforms.

## Synopsis

“Robo-Advice: Mapping the Competitive Landscape” looks at the growing robo-advice market. As the industry lacks clear definition of what robo-advice is, we clarify the differences between various automated investment platforms. Case studies of the most successful and established robo-advisors provide insight on what features appeal to clients and why. Drawing on our 2015 Global Wealth Managers Survey the report specifically analyzes HNW investors’ attitudes toward automated advice. Established software vendors’ activity in the robo-advice space is also covered.

Specifically the report:



**WISE GUY**  
R E P O R T S

Norah Trent Partner Relations & Marketing Manager

✉ [sales@wiseguyreports.com](mailto:sales@wiseguyreports.com)

☎ Ph: +1-646-845-9349 (US) Ph: +44 208 133 9349 (UK)

🌐 <https://www.linkedin.com/company/4828928>

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- Defines robo-advice, providing an overview of its history so far and regulators' approach to services provided by automated advice platforms.
- Provides case studies of successful robo-advisors operating in a number of markets, including the US, the UK, Switzerland, and Australia.
- Identifies the digital platform features that appeal to HNW investors.
- Analyzes wealth managers' attitudes towards robo-advice.
- Looks at the benefits of partnerships between robo-advisors and competitors operating traditional business models.

#### Reasons to Buy

- Understand what robo-advice is and how it affects traditional wealth managers.
- Recognize regulators' approach to robo-advice and the guidelines to consider when launching digital investment platforms.
- Learn best practice from established automated advice providers' case studies.
- Discover how automation can be beneficial to your company's operations, particularly in relation to advisor efficiency.
- Identify the markets with the highest growth potential in the automated investment space.

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##### DEFINING ROBO-ADVICE

Robo-advisors are digital investment management platforms

The first client-facing robo-advisors were founded in 2008

Robo-advisors were preceded by PFM tools

Automated advice platforms are often fintech startup companies

B2C robo-advisors have been evolving, with traditional players building their platforms

Robo-advice has also entered the B2B space

Financial advisors can use existing solutions initially designed for the B2C market

Robo-advice platforms are now offered by IT software developers

Regulators are increasing the scrutiny on automated advice

Regulators' attitudes towards robo-advice differ between markets

The industry should use the robo-advice label carefully

##### CLIENT-FACING ROBO-ADVISORS COMPETITIVE LANDSCAPE

The US is the home of robo-advice

US robo-advisors operate three typical business models

The vanilla US robo-advisors appeal to cost-sensitive investors looking for simplicity

Hybrid business models leverage the digital channel to offer advice provided by humans

Robo-advisors have to introduce unique features to succeed in the long term

UK robo-advisors have been lacking recognition

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Norah Trent  
wiseguyreports  
+1 646 845 9349 / +44 208 133 9349  
email us here

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