



AIDM7470

Webull HK 2026 Q1 Digital Marketing Campaign

•Subtitle: "Investment Starts at 0, Commissions Start at 0 – Young Investors' First AI Investment Tool"

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Situation Analysis & Market Insights

Self Evaluation Analysis

Core Product Advantages

- **True Zero Fee:** 0 commissions/platform fees for HK/US stocks; saves HK\$12,000-18,000/year vs. traditional brokers (Source: talkmoney.com.hk)
- **AI Investment Assistant:** Smart stock selection, real-time analysis; 2025 mobile optimization (fits Hong Kong users' mobile-first habits)

Core Pain Points

- High hidden commissions,
- complex tools for newbies,
- trust concerns (SFC license/ fund safety)



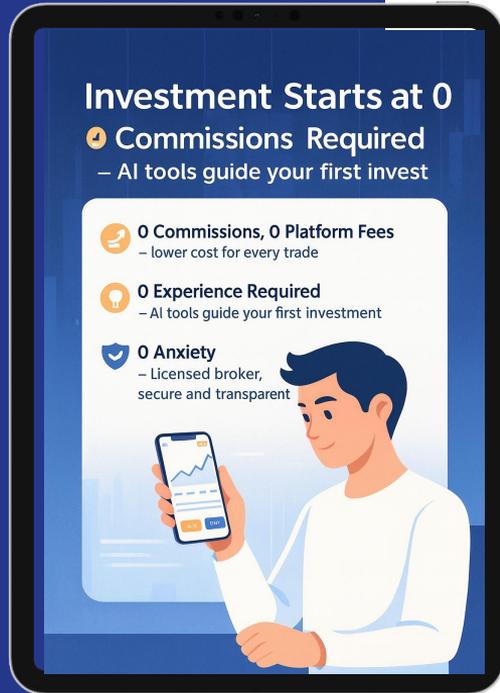
Market Trends



Target Audiences

Audience type	behavioral habit	Core pain points
Newbie Investors (18-30)	Xiaohongshu/I G active	Avoid high commissions, complicated operations, and wrong target selection
Savvy Professionals (30-45)	Facebook/YouTube-	High commission and time-consuming manual analysis
technology-interest investors (22-35)	Familiar with AI tools	Advanced AI tools and no commission restrictions

Campaign Core Idea



Big Idea

"Investment Starts at 0, Commissions Start at 0
– Young Investors' First AI Investment Tool"

Three "0" Pillars

- 0 Commissions + 0 Platform Fees: Solves high-cost pain points
- 0 Experience Required: AI tools simplify stock selection for newbies
- 0 Anxiety: SFC license + user testimonials build trust

Three "0" Pillars

- Newbies: "Zero-commission account opening, AI guides your first win"
- Professionals: "Saved commissions = extra earnings"
- Tech-Savvy Users: "AI helps – investing without 'effort'"

Storyline

Pain Points → **Solution** (Webull Zero-Fee + AI) → **Value** (All investors win with low cost & efficiency)



Channel Strategy Table

Channel	Positioning	Target Audience	Journey Stage
Xiaohongshu	Newbie Seeding + UGC	18-30 Newbies	Awareness
ins	Visualized seeding, interactive traffic hub	25-35	All stages
Facebook	Comparison + Expert Backup	30-45 Professionals	Consideration
YouTube	In-depth Tutorials	28-45 Tech Users	Consideration
webull APP	Professional Penetration	28-45 Veterans	Loyalty

Channel Strategy & Engagement Mechanics

Key Engagement Mechanics

- #5-Minute Account Opening Challenge (Conversion: Timed video + stock reward)
- Commission Calculator H5 (Awareness→Consideration: Cost comparison + share bonus)
- "AI vs. Me" Weekly Simulation (Retention: AI vs. personal portfolio yield)
- #Webull True Q&A Day (Trust: Live with PM + KOL, compliance answers)

Paid Media Strategy - Q1 2026

Role of Paid Media

Paid media amplifies the brand idea “0% fee, 100% investment power!” in Q1 2026. It works together with social content and KOL/KOC to build awareness for True Zero Fee + AI Investment Assistant, drive app registration and account opening, and re-engage new users to make first deposit and use AI features.

Channel	Role in Campaign	Ad Formats	Budget Share
Instagram / Facebook	Main performance channel: traffic & registrations	Feed / Story / Reels conversion ads, boosted posts	40%
YouTube	Explain “0% fee + AI”, build trust	Skippable in-stream, bumper ads	25%
Xiaohongshu (RED)	Grow social buzz & saving/sharing behaviour	In-feed image / video ads, KOL amplification	20%
Google UAC / Search	Capture high-intent users for install & registration	App campaigns, brand & generic keywords	15%

Flighting & Optimization

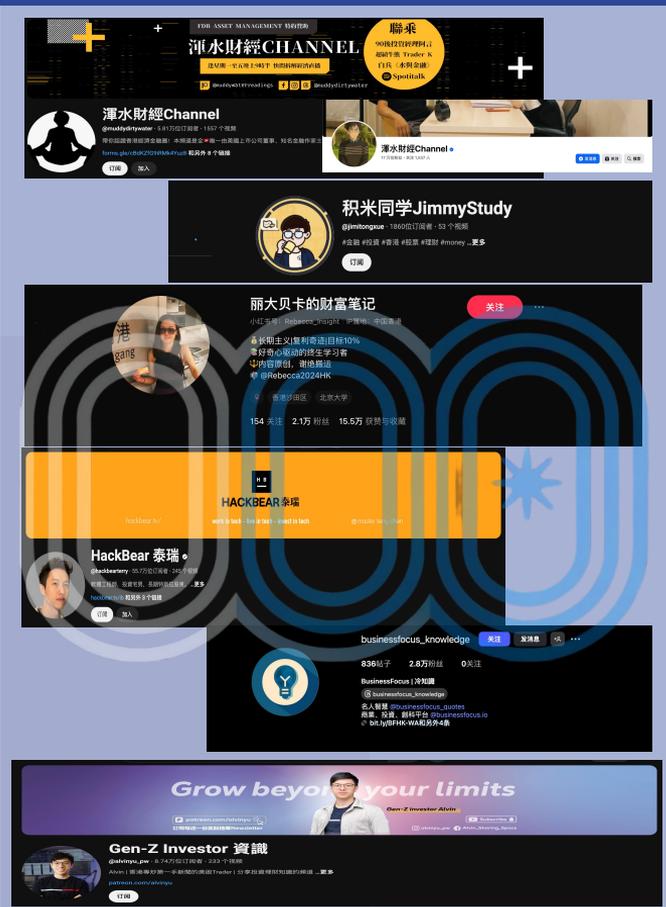
- **Month 1** - Awareness: focus on IG/FB + YouTube for reach and views (fee comparison, True Zero Fee message).
- **Month 2** - Conversion: shift budget to IG/FB conversion campaigns and UAC to drive app installs and registrations.
- **Month 3** - Retention & Re-activation: use retargeting to activate installed-but-not-registered and registered-but-no-deposit users, highlighting 0% fee and AI-supported daily investing.
- **Key optimization metrics:** Awareness - Reach, CPM, Video Views, VTR; Conversion - Installs, Registrations, CPA/CPR; Retention - First Deposit rate, Re-activation rate, AI feature usage.



Media & KOL/KOC Promotion Plan

KOL/KOC Details Table

Type	Name	Platform	Followers	Key Collaboration
KOL	Terry (@hackbearterry) Technical practice-oriented	YouTube	557k	AI tool review + API tutorial
KOL	Gen-Z Alvin (@alvinyu_pw) Technical practice-oriented	YouTube	87.4k	US stock zero-fee content
KOL	Muddy Water Finance Authoritative expert type	YouTube face book	58.1k 17k	SFC license + fund safety test
KOC	Rebecca (@Rebecca2024HK) Affinity Sharing Type	Xiaohongshu	21k	Newbie seeding + UGC call
KOC	Jimmy Study (@jimitongxue) Affinity Sharing Type	YouTube	1.86k	Student-focused low-cost guides
KOC	BusinessFocus Infographic	Instagram	28k	Commission comparison infographics



Monthly Execution Plan – Month 1 (Warm-Up)

- Core Goal: Awareness building (Reach $\geq 100k$, Engagement Rate $\geq 2.5\%$)
- Weekly Content Rhythm

Instagram

2 videos/week: Commission pain points + zero-fee intro



2 3

你而家券商收幾多佣金?

“傳統券商 HK\$25/筆” vs “Webull HK\$0”

全年慳HK\$15,000

儲存+分享呢張圖, 留言贏HK\$100交易券!

Xiaohongshu

2 posts/week: Account opening guide + AI test



初到香港, 是否有投資煩惱?
傳統券商HK\$25/筆, Webull 000
更適合新手小白的投資平台
#香港新手理財

Facebook

1 post/week: Investor structure + SFC license



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Monthly Execution Plan – Months 2–3

Month 2 (Launch)

- Goal

Conversions (Accounts Opened $\geq 2k$,
Zero-Fee AI Challenge $\geq 1.5k$)

- Key Actions:

Full-channel #5-Minute Account Opening
Challenge (weekly winners announced)
YouTube KOL premieres (Terry/Muddy Water)
Facebook live Q&As (1/week: PM + KOL)

Month 3 (Retention)

- Goal:

Loyalty (First Deposit $\geq 1.5k$, 30-Day
Retention $\geq 35\%$)

- Key Actions:

"AI vs. Me" weekly simulation (daily yield reports)
Xiaohongshu UGC collection (#MyWebullEarnings)
Facebook community operation (daily market briefs)

KPI Metrics

Future Work Plan

KPI of Hong Kong Market (Q12026)	predictive value counter	Calculate formula / basis
Reach	2.5–2.6M	$109M \times 2\% \times 1.18$
mention rate (SoM)	$\geq 2\%$	$HK_Mentions \div HK_Industry$
Download and register	50–55%	$HK_Registrations \div HK_Downloads$
Sign up → Recharge (Funded)	18%	$HK_Funded \div HK_Registrations$



Summary & Outlook

Core Strategy Highlights

- **Dual Engine Driving Value:** "Zero-Fee" (cost advantage) + "AI Assistant" (efficiency boost), addressing all audience pain points
- **Full-Journey Coverage:** Precisely matches channels, content & interactions to "Awareness → Consideration → Conversion → Loyalty"
- **Cost-Efficient Execution:** KOC-focused "wide-net" strategy, balancing reach and conversion ROI"

Next Steps

- Weekly data tracking via Brand24 & Google Analytics
- Monthly budget adjustment based on channel conversion efficiency
- Q2 strategy iteration using Q1 user behavior insights
- Webull: Empower Investors with Technology