

African Private Wealth Report 2020/21  
(South Africa, Kenya & Nigeria)  
 U/HNWs, Entrepreneurs, Family Offices & Private Wealth Professionals

*An in-depth research study into the emotional behaviours and experiences of   
1) Private clients and family offices resident in South Africa, Kenya and Nigeria  
2) African & international private wealth professionals serving African private clients*



**The Research Study**

Gibson Strategy

We are delighted to announce a major new in-depth research study that will examine private clients and family offices in South Africa, Kenya and Nigeria; their experiences and the relationship with their private wealth professionals.

In addition, we will interview African and international based private wealth professionals about serving African private clients.

A total of 100 individuals are participating in the independent research study, comprising of 40 private clients (HNWs, UHNWs, HVRs and wealthy entrepreneurs) and 60 private wealth professionals (trustees, investment managers, family office professionals, private bankers, insurance brokers, estate agents, lawyers, tax advisers, relocation consultants). All participants are taking part in qualitative interviews, sharing their expert views, insights and experiences in the context of African private wealth.

**Research Topics**

* We are exploring aspects of private client’s selection criteria for private wealth professionals and service providers.
* We are investigating client communication, relationships, value, service quality, satisfaction, trust, loyalty and retention.
* Furthermore, are exploring private client services such as private banking, investment management, trust & corporate services, family office services, legal services and tax services.
* In addition to key private wealth themes such as family offices, succession planning & next generation, substance, sustainable investing, philanthropy, privacy and security.
* We are also investigating **private client insights** with regards to banking, investments, collectibles, real estate, private equity, co-investing, lending, focussing on technology, social impact investing, private jets and private client insurance.
* Finally, we are asking private clients and private wealth professionals about their views on **the future of the private wealth sector**.

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| --- | --- | --- | --- |
| Country | Private Clients & Family Offices | Private Wealth Professionals | Total |
| South Africa | 20 | 30 | 50 |
| Kenya | 10 | 15 | 25 |
| Nigeria | 10 | 15 | 25 |
| **Total** | **40** | **60** | **100** |

**In Summary:**

* Research Population:

40 private clients and family offices  
60 private wealth professionals

* Research Methodology:

Qualitative in-depth face-to-face interviews

Quantitative questionnaires

* Report Circulation:

Global private clients, family offices, private wealth management professionals and key international jurisdictions

**The research report will include:**

SECTION ONE: South Africa, Kenya & Nigeria

The private wealth market: background, origins, numbers, source of wealth, generations, gender, sectors, growth, type - entrepreneurs/ retirees/individuals/family offices. The decision to reside in the UK and which other jurisdictions were/are considered (push/pull factors), benefits and experience of staying in the region. Acquiring and retaining high value private clients for African businesses. What drives/motivates/ inspires/concerns high value private clients – now AND in the future … and their lifestyle choices.

1.1. A Brief History of the region

1.2. The Private Wealth Industry in the region

1.3. Private Wealth in Numbers in the region

1.4. The Regulator in the region

1.5. Relocating to other Jurisdictions

SECTION TWO: THE PRIVATE WEALTH MARKET

2.1. Private Clients and Family Offices

2.2. Private Wealth Professionals

SECTION THREE: PRIVATE CLIENT SERVICES

3.1. Private Banking

3.2. Investment Management

3.3. Trust & Corporate Services

3.4. Family Office Services

3.5. Legal Services

3.6. Tax Services

3.7. Private Client Insurance

3.8. Property/Real Estate

3.9. Private Jet and Yacht Services

SECTION FOUR: PRIVATE WEALTH THEMES

4.1. Family Offices

4.2. Succession Planning

4.3. Substance

4.4. Sustainable Investment/Green Finance

4.5. Philanthropy

4.6. Collectibles

4.7. Technology and Cyber Security

4.8. Personal Protection and Security

SECTION FIVE: PRIVATE WEALTH TRENDS

5.1. The African Private Wealth Sector – The Future

**Contact Details**

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**Who should sponsor the study? – Private Wealth Management Professionals ✓**  
Private/investment banks, wealth managers, asset and investment managers, trust & fiduciary firms, fund managers/administrators, general/life insurance & pension advisers, independent financial advisers, private client lawyers, private client accountants/tax advisers, FX & global payment firms, property & real estate firms, transport providers (private aviation, yachting), luxury goods/service providers.

**The Published Research Report**

* The key findings of the research report will be presented at the report launch event in the **South Africa, Kenya and Nigeria**, with an invited audience of high value private clients and private wealth professional contributors/sponsors.

Access an audience of African and international private clients

**Benefits to a Sponsor**

What does the sponsor contribute?

* **Sponsorship fee: £5,000**
* Interview: Approximately 1.5 to 2 hours

What does the sponsor get in return?

* The opportunity to be associated with a **high quality research study** into private clients and family offices
* In addition to the published report, the sponsor receives a separate more **comprehensive in-depth 'Insight Report'** presented in a one-to-one meeting with the author; a unique offer only for the sponsors!
* A unique opportunity to **add their own specific question** to the research study
* **Branding within final report** - 1/2 page advert in the published report which is distributed to high value residents/private clients - gaining massive brand exposure
* Branding on website - their logo and information on a dedicated 'report website' - **accessed by a wider audience**
* Branding on all communication for the event as a **'contributing sponsor'**
* **1,000** hard copies distributed to private clients/family offices and PDF available to **20,000**+ private wealth management professionals
* ... plus **invite at launch event** - an opportunity for sponsor to attend the launch event and meet private clients
* … plus **one delegate pass for a 1 Day Masterclass**

*"Over the past 16 years, I have had the pleasure of regularly working with Dr Stuart Gibson, in a variety of capacities but always on marketing strategies in international markets, often with an emphasis on Africa. Stuart has proven to be a highly knowledgeable expert in business development strategy in the wealth management sector. He is very focussed on the commercial value he adds and I am absolutely delighted to recommend him."* ***Trevor Falle****- former CEO FirstRand*

Research conducted

by **Dr Stuart Gibson**

PhD MSc DipM FCIM FCMI FIDM  
Dr Stuart Gibson is an independent business consultant and expert in research, due diligence and strategy consulting within the wealth management sector. Dr Gibson holds a PhD and MSc in Marketing, Private Banking & Private Wealth Management. He is a Fellow of The Chartered Institute of Marketing, a Fellow of the Chartered Management Institute and a Fellow of The Institute of Direct and Digital Marketing.

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**LIMITED SPONSORSHIP AVAILABLE £5,000**

**1 Day Masterclasses**  
We also deliver thought leadership **1 Day Masterclass courses**, delivered by **Dr Stuart Gibson** which will show you how to improve the growth, acquisition, retention, service, experience, development and profitability of UHNWs, entrepreneurs and family offices in today’s changing and challenging times. This 1 Day Masterclass course is designed to help you build the skills necessary to implement an effective and profitable client engagement strategy. Contact Dr Stuart Gibson or Rob Kelly today.

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Dr Stuart Gibson

