

Bull & Bear 'Office Shenanigans'

Context

While over half of Gen Z (54%) invest, only **1 in 3** say they feel confident explaining how the stock market works¹.

Idea

We met Gen Z where they are and created social mascots — **the stock market's own bull and bear**.

It's platform-first and unexpectedly fun. And while we all root for Bull, we're showing that there's no need to fear Bear.

Platforms

(primarily organic with pockets of paid support)



¹Source: Investopedia, 2022



Execution

We brainstormed and debated the very nuanced personalities of our 4-legged leaders. Naturally **Bull is more dominant** — a leader who is **organized, goal-driven and detail-loving**. He's put together, wound tight and his tongue can be as sharp as his wardrobe.

Bear, on the other hand, is slower, sloppier and a little feral for the office. He means well but doesn't try much, and often sleeps on the important stuff. But Bear's heart is kind and true.

Bull & Bear need each other, which is lucky since they work in the same place. They help us with ongoing timely & trending content, community outreach, and building brand love. They're even known to surprise & delight with fun merch giveaways.

On top of all that, they help us **humanize the Fidelity workplace**, breaking down the wall between our customers and a traditionally opaque Fidelity environment.




Bull & Bear Merch Extensions

Our first merch hit in December of 2022 with everyone's favorite: the ugly holiday sweater. We teased them in videos across platforms, and in carousels featuring awkward family photos. Lucky recipients responded with their own photos and stories, where they proudly repped B&B.

467
sweaters
given out via
Instagram & Reddit

 **madeofgold** 71w
I'm bullish on these sweaters!!!!!! 🐮🐮🐮
Reply

 **jenrowell4** 71w
Haha love these! ❄️🐮🐻
Reply

 **juvieann** 71w
🐮🐮 would love a sweater pls! ❤️
Reply

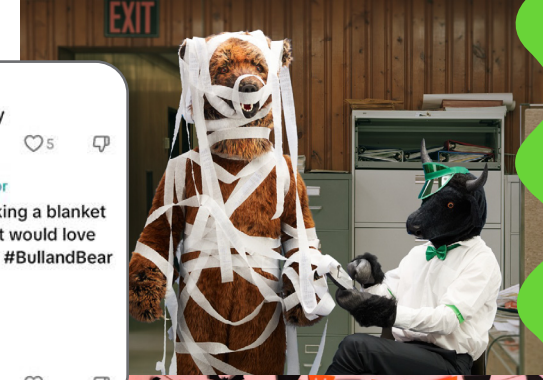


 **will & abby**
This is why I chose fidelity 😂
2023-6-25 Reply ❤️ 2



Bull & Bear Merch Extensions

Bull & Bear have a lot of adoring fans — and we love to give the people what they want. Beanies, blankets, banter. We're building a warm and fuzzy community that makes investing a little more approachable.



marques_dejoing24 32w
@ryan_casey8 I need me one of these or both of them!! 🐻🐮🐻
Reply

Tessa
I need context to their lovestory
2023-6-12 Reply 5
Fidelity Investments - Creator
We aren't comfortable making a blanket statement at this time - but would love to hear your theories #FYP #BullandBear
2023-12-12

ben_kessler57 31w
@pmwood17 bro r u this beanie cuz you super cute
Reply

austin_the_brimstone 8w
The ICONS return 🐻🐮
Reply



76
beanies
given out via Instagram

5%
higher than average
engagement rate
on giveaway posts across platforms

49
posts across platforms

220k
total engagement

421k
impressions

206k
video views

