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# US Institutional Investor Brandscape<sup>®</sup>

Identifying key trends in investment strategy and asset manager selection, usage and loyalty

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Institutional investors are a coveted audience, controlling billions of dollars in assets and pushing the envelope in investment management strategy. While they often turn to consultants when making decisions about selecting a firm to fulfill a particular mandate, institutional investors remain the ultimate decision-makers. Understanding and leveraging the end-client perspective gives asset management firms a distinct advantage when new mandates are contemplated.

US Institutional Investor Brandscape examines the behaviors and attitudes of senior investment professionals across defined benefit (DB) pension plans, and private and public foundations and endowments. The report covers overall trends in asset allocation and investment strategies, the variables that lead to selection, and the current state of brand equity, differentiation and loyalty in this critical market.

## BOOST PROFITABILITY

Identify growth segments in the institutional marketplace to boost profitability and grow market share

## TRACK COMPETITORS

Benchmark performance against your key competitors to improve positioning

## MAXIMIZE RETENTION

Understand the elements that strengthen client satisfaction and promote loyalty

# US Institutional Investor Brandscape Overview

## AREAS OF INQUIRY

### Future Asset Allocation

- Expected changes in asset allocation
- Drivers of asset allocation changes and desired outcomes by asset class and product type

### Current/future Investment Strategy Trends

- Current/future use of liability-driven investing; multi-asset strategies; outsourced CIO multi-asset strategies; environmental, social and governance investing; and pension risk transfer options
- Unaided and aided awareness and consideration of LDI, OCIO and PRT providers

### Asset Manager Selection Process

- Number of asset managers currently used, number likely to add over next 12 months
- Importance of 17 specific metrics in selecting a new manager and in selecting the most recent asset manager hired

### Brand Equity and Brand Differentiation

- Awareness and overall impression of 55 institutional asset managers
- Unaided and aided consideration of leading asset managers
- Unaided consideration of asset managers as active, passive, equity or fixed income providers
- Aided consideration of asset managers by asset class
- Perceptions of leading broad asset managers across 13 brand attributes
- Brand engagement across 13 outreach channels
- Most effective communication method, optimal frequency
- Conference attendance and print and online publications used

### Evaluation of Asset Managers

- Asset manager penetration
- Loyalty to and satisfaction with asset managers across 15 metrics
- Asset managers likely to drop in next 12 months
- Reasons for dropping asset managers

## SAMPLE SIZE AND METHODOLOGY

- Representative sample of 400 institutional investors with at least \$100M in institutional assets
  - Corporate defined benefit pensions
  - Public defined benefit pensions
  - Taft-Hartley pensions
  - Endowments
  - Private foundations
  - Public foundations
  - Tax-exempt organizations
- Web-based survey

## PUBLICATION SCHEDULE

- Survey fielded: October–November 2018
- Publication: February 2019
- On-site strategy session: March 2019

## SUBSCRIPTION INVESTMENT: \$35,000

- Detailed report including a summary of findings and strategic implications
- On-site strategy session, presentation designed to deliver actionable results and facilitate strategic planning
- Custom data cuts and survey work by senior analysts

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