

Case Study:

DOMESTIC INVESTOR SEGMENTATION

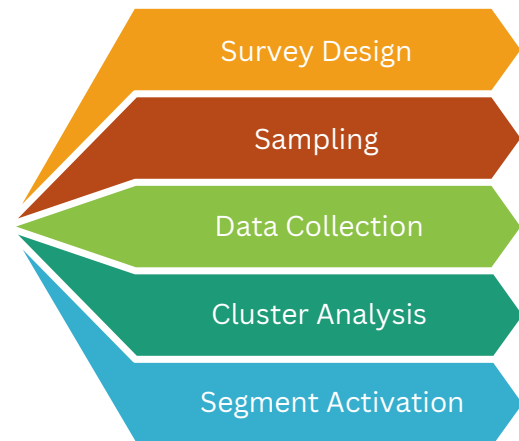
Client Challenge

A leading investment management firm wanted a deeper understanding of its strategic investor targets in order to set the foundation for future strategic efforts.

To accomplish this, they wanted to uncover distinct motivational profiles of investors and the key drivers impacting behavior.

Ironwood's Solution

IIG developed an online questionnaire that focused on investor awareness/usage, general behaviors, personality attributes, and unmet needs. Respondents were then sampled across investable asset value, age, and lifestyle. Utilizing this data, a multivariate cluster analysis was conducted.

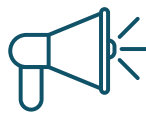


Key Outcomes

A robust 6-segment solution was identified in this research. This solution was also applied to the client's master dataset to help with targeting and reach.



Inform key marketing decisions



Develop targeted communications



Prioritize product development decisions