

# The Persona Playbook

Knowledge Seekers and Alpha Hunters

April 18, 2017

Executive Summary:



Greenwich Associates began its inquiry into “persona”-based segmentation in 2015.

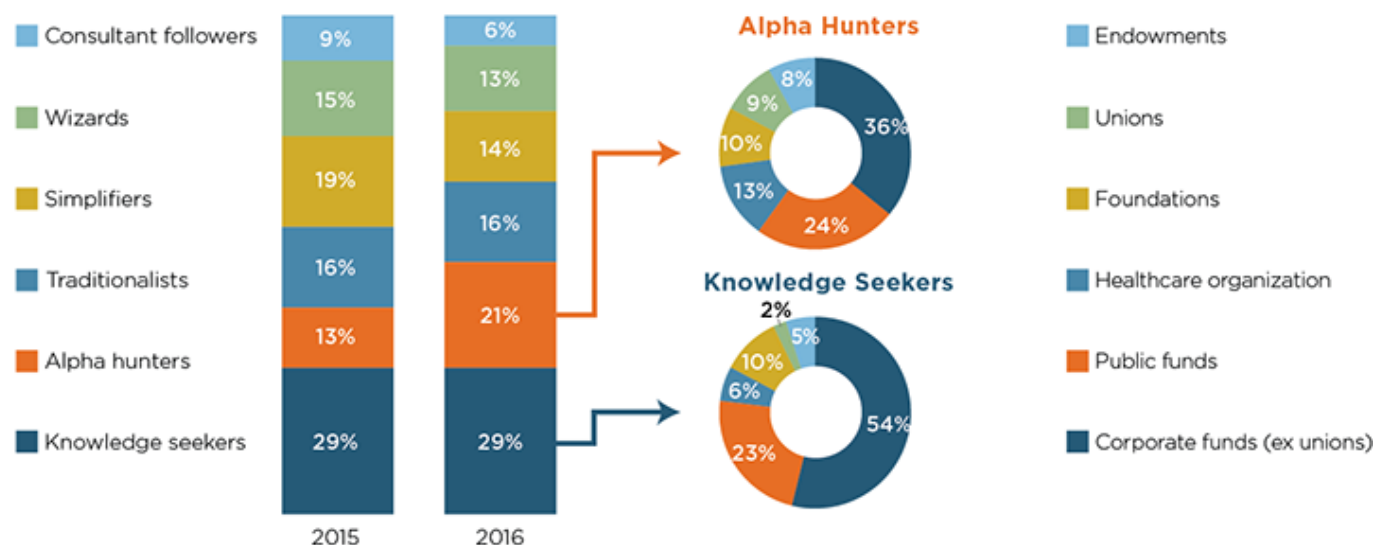
We segmented thousands of institutional investors into one of six categories to provide asset managers and consultants with a more actionable segmentation approach, driven by client needs and behaviors rather than demographics.

We continue to listen to the needs of investors and monitor the shifts in the institutional landscape. Our recently completed 2016 research shows two very important trends:

- 1. Knowledge Seekers** remain the largest persona group in our research, confirming that institutional investors continue to place a premium on the expertise and partnership offered by their investment partners.
- 2. Alpha Hunters** have shown the largest growth in population since last year, serving as further evidence that investors are increasingly under pressure to achieve strong returns.

## PERSONA SEGMENTATION

Proportion of U.S. institutional investors



Note: May not total 100% due to rounding.

Source: Greenwich Associates 2016 U.S. Institutional Investors Study



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