

# Use of Custom Surveys by Investment Professionals

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## Abstracts

Despite the financial market crisis, 38% of financial analysts use surveys as part of their investment research process, according to a new study by Integrity Research Associates and ValueNotes. 'Custom Survey Research' analyses the survey research industry focused on the investment community through a survey carried out from April through June 2009 across key financial markets.

Surveys gather data through formal or informal polling techniques. Informal surveys have become especially popular with financial analysts. Surveys help investors confirm their investment theses in a quick and efficient manner from primary sources. We estimate that the survey research industry is generating revenue of US\$ 208 million per year specifically from investment management clients. This revenue includes survey work conducted not only by traditional market research firms, but also by expert networks and channel checkers. Despite the large number of survey providers in the industry, only a fraction of them are currently servicing clients in the financial services space.

Finding the right firms to conduct surveys that result in meaningful and actionable investment ideas can be extremely challenging.

ValueNotes and Integrity Research's co-authored report helps investment professionals address these challenges by profiling 49 providers that have experience in servicing the financial community.

The report provides a brief background of the industry, examines ways that investment professionals currently use surveys in their process, and discusses regulatory and compliance issues.

Over 80 investment professionals were surveyed to get their thoughts, including

directors of research, CIOs and portfolio managers and analysts at buy-side and sell-side firms in the U.S., Europe, and Asia-Pacific region.

In-depth interviews were also conducted with experts in the survey research field. The report also draws upon the authors' experience tracking the investment research space; and mainstream literature on the topic of primary market research and survey work.

As a bonus material, this report includes a comprehensive guide on how to best conduct end-to-end survey work. This guide is directed specifically to professionals who are interested in incorporating survey work as a part of their investment research mosaic. The guide provides theory and real-life examples that will help analysts decide when and how to best conduct survey work.

The report was collaborated on with Integrity Research Associates, a specialist firm which analyzes investment research. Both firms contributed to the writing and editing of the report.

The end result is a comprehensive buyer's guide to custom survey research. This report will help investment professionals in saving time, saving money, and ensuring they get the most out of the survey work they intend to do in the coming year.

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