

Dreyfus

Cash Investment Strategies

Attitude and Thought
Leadership



1

Earned Media Campaign

Challenge

With the changing political landscape in the United States, Dreyfus, a subsidiary of BNY Mellon company needed to understand if investors had changed their financial strategies in context of the potentially shifting investment landscape.

Dreyfus wanted to understand customer perception and attitudes towards investing in order to offer them the appropriate service and guidance. In addition, Dreyfus wanted to reaffirm itself as a thought leader and pioneer in U.S. investing.

1,250

Investors Surveyed

Solution

Using the QuickSurveys Platform, Toluna & Dreyfus were able to immediately tap into 1,250 individual investors. These respondents were 21 or older with at least \$50,000 in investable assets. We also surveyed 200 independent and institutionally-based financial advisors.

The study was developed to gain a better understanding of perceptions
The goal was to help the company better offer guidance and assistance

200

Financial advisors
Surveyed

Impact

With the findings, Dreyfus crafted and launched “Helping Meet Investor Challenges” – a thought leadership piece that was used as the center of an earned media campaign.

The data showed that despite the uncertainty in the US and Global markets, a majority of investors would put off addressing today’s market challenges; less than 25% of investors intend to address the challenge’s on a year’s time.

This enabled Dreyfus and their CEO, Mark Santero, to reiterate the benefits advisor can provide by tailoring a goals-based approach to individuals.