

MEMO# 2606

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NEW ICI RESEARCH PUBLICATION

March 12, 1991 TO: BOARD OF GOVERNORS NO. 17-91 MEMBERS - ONE PER COMPLEX NO. 11-91 DIRECT MARKETING COMMITTEE NO. 8-91 MARKETING COMMITTEE NO. 10-91 PUBLIC INFORMATION COMMITTEE NO. 8-91 RESEARCH COMMITTEE NO. 7-91 SALES FORCE MARKETING COMMITTEE NO. 8-91 SHAREHOLDER COMMUNICATIONS COMMITTEE NO. 6-91 SMALL FUNDS COMMITTEE NO. 3-91 RE: NEW ICI RESEARCH PUBLICATION I enclose a copy of the most recent research report entitled, Channels Introduce Potential Owners to Mutual Funds which is the fourth report published in the ICI series The Distribution Connection. The report examines the characteristics, investment purchase patterns and attitudes of an important marketing segment-- potential mutual fund owners, those individuals who did not own long-term funds but expressed firm intentions to buy them and had the means to do so. While most research defines current fund owners, this summary provides insights into a company's future market and contrasts potential owners' use of distribution channels with those of recent buyers, who were the focus of the proceeding reports in this series. Other reports in this series are as follows: The Distribution Connection: Channels Link Shareholders to Mutual Funds, 1989 The Distribution Connection: Summary Report of Major Research Findings, 1990 The Distribution Connection: Targeting Investors and Increasing Market Share, 1990 For information about these or other ICI research reports and activities, contact Sandy West, Director, Marketing Research, at (202) 955-3509. Jacob S. Dreyer Vice President and Chief Economist

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