Perspectives Series: Virtual Investor Days
Introduction

Given the unique headwinds that altered and delayed traditional marketing efforts throughout 2020, the expected increase in demand for steady and reliable corporate communications in 2021, and lingering concerns around the effectiveness of “virtual” engagements, IHS Markit’s Investor Day Advisory, Corporate Advisory, and Perception Analytics teams collaborated to gather research and market intelligence to help clients better understand this continually evolving landscape.

Through the use of IHS Markit’s Street Beat and Canvass products, we collected commentary directly from nearly 200 buy-side investors, sell-side analysts, and corporate issuers to understand real-time sentiment on how COVID-19 has impacted corporate access and more importantly, what steps can be taken to ensure that the engagement needs of all constituencies are met in this new environment.

This report details the role that virtual Investor Days will play as a critical communication tool and outlines best practices for hosting these events.
Key takeaways

**Technological preparation is key.** Keep the event succinct and ensure that the message is not drowned out by miscues, glitches, and other tech issues.

**Organize interactive sessions** (product demos, segment breakouts, round table discussions, fireside chats, breakfast “coffee talks,” post-event 1-on-1 follow-ups) before, during, and after the event.

**Provide plenty of time for Q&A** and ensure that various members of management actively participate.

**Gain control of the narrative and format,** present compelling imagery, highlight the breadth and depth of management, as well as showcase products, facilities, and internal processes.

**Provide supportive commentary and data through interactive slide deck** available prior to, during, and after the event.
Market perspectives:
Roadmap for successful virtual engagement
Technology is critical to success

Technical logistics can go overlooked when planning virtual Investor Days. It is important to manage the length of the event and pre-test all systems to minimize the potential for audio/video miscues.

Click the above the circles to learn more
Management access still matters

Virtual events provide numerous unique opportunities to increase exposure to top executives and other important management figures through presentations, pre-recorded videos, Q&A sessions, product/segment breakout sessions, roundtable and fireside chats, as well as post-event one-on-one follow ups.

Click the above the circles to learn more
Q&A is a top priority

It is critical for issuers to have a virtual format that facilitates formal and informal direct engagement with key executives and business heads to allow ample time for Q&A.

Click the above the circles to learn more
Videos are a unique opportunity to enhance your story

Pre-recorded video packages provide issuers increased control over narrative and format and should be used throughout the event to present compelling imagery, highlight the breadth and depth of management, and showcase products, facilities, and internal processes.

Click the above the circles to learn more
Supporting materials are key to reinforcing your message

Similar to the sentiment around the value of compelling and insightful video presentations, many investors and analysts note the importance of providing supportive materials and data through an interactive slide deck that is available online prior to, during, and after the event.

Click the above the circles to learn more
In-person events remain the preferred choice for many

Of note, many investors and analysts suggest that virtual Investor Days are not a worthy substitute for in-person engagement and that they prefer for issuers to focus on how best to return to normal in-person meetings, conferences, and Investor Days.

Click the above the circle to learn more
Consider the health and safety of attendees

These respondents emphasize that in order to return to normal engagement, it is critical for issuers to have a clear justification for the need to host an Investor Day and commit to and promote an overly-cautious approach given the numerous health and safety concerns.

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Contact us

CUSTOMER CARE

NORTH AND SOUTH AMERICA
T +1 (800) 305 0819

EUROPE, MIDDLE EAST AND AFRICA
T +44 20 7665 9822

ASIA PACIFIC
T +852 3742 1068

JAPAN
T +81 3 6262 1790

E CallMeNowIR@ihsmarkit.com

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