

BRANDING
STRATEGY
INCORPORATE: DESIGN
IDENTITY
COMMUNICATIONS
PRINT
DIGITAL
ENVIRONMENT

Does your brand stand up to competition?

Benchmarking the brand strength of 22 UK based mid-market private equity firms

Summer 2018

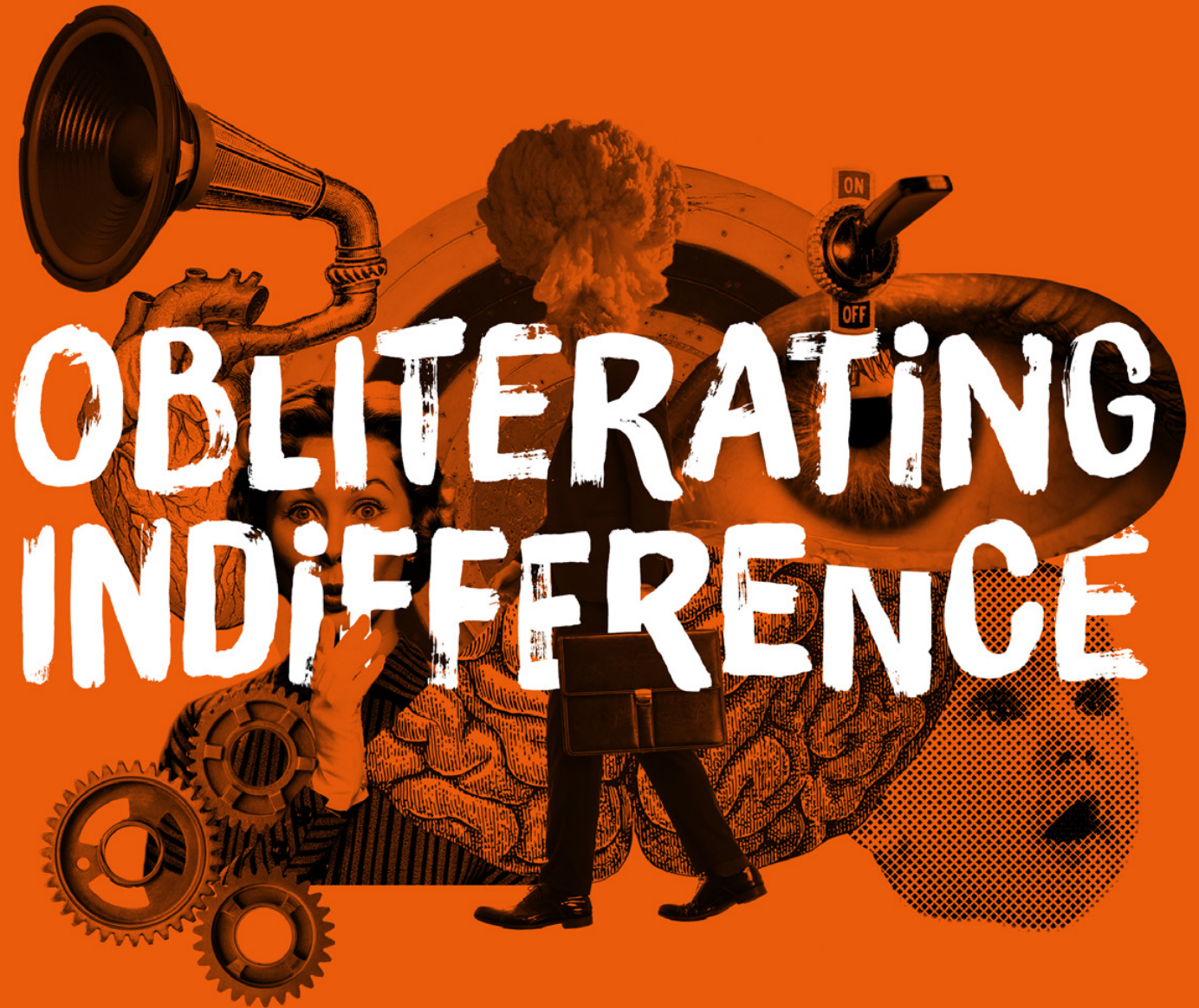
Incorporate Design: Who are we?

We're an independent branding agency. We work with the leadership teams of partnership and founder-led organisations to resolve issues around positioning and identity in order to instigate step-change transformation.

We believe that successful brands need to provoke an emotional response. Hedging your bets, being cautious and trying to be all things to all people are no longer viable business strategies. Bland is dead. The brands of tomorrow need to be targeted, focused and courageous. To thrive, they need to obliterate indifference.

We have extensive experience working across the financial sector and we are always on high alert, staying vigilant so that we notice any issues that might affect our current or potential clients.

There was a blip on our radar highlighting branding activity in the Private Equity sector – so we decided to investigate further. Here is what we discovered. We hope it is enlightening.



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Where does your firm stand amongst the competition?

The strength of your brand is a valuable business asset, especially in a competitive market. We have scored the brand strength of 22 private equity firms who invest up to £25M in European investments.

See where your firm scored amongst its competitors.

Rank	Firm	Score (out of 98)	Score %
1	Frog Capital	91	93%
2	Piper	85	87%
3	Tenzing	76	78%
4	Key Capital Partners	64	65%
5	Next Wave Partners	62	63%
6	NVM Private Equity	57	58%
7	RJD Partners	56	57%
8	Mobeus Equity Partners	55	56%
9	Apposite Capital	53	54%
10	Magenta Partners	52	53%
11	FPE Capital*	48	49%
12	Prefequity	48	49%
13	Smedvig Capital**	44	45%
14	Amadeus Capital Partners	40	41%
16	Lonsdale Capital Partners	39	40%
15	Weight Partners Capital	34	35%
17	Beechbrook Capital	32	33%
18	Alcuin Capital Partners	30	31%
19	Kelso Place Asset Management	28	29%
20	Harwood Private Equity	24	24%
21	Leopard Rock Capital Partners	18	18%
22	EPIC Private Equity	11	11%

* FPE Capital launched a new website in July 2018. This was after we had completed our scoring and analysis. We have since rescored them and they achieved 78% and would have been positioned 4th.

** Smedvig Capital launched a new website on June 2018. This was after we had completed our scoring and analysis. We have since rescored them and they achieved 83% and would have been positioned 3rd.

The original scores have been used in the analysis for this report.

KEY FINDINGS

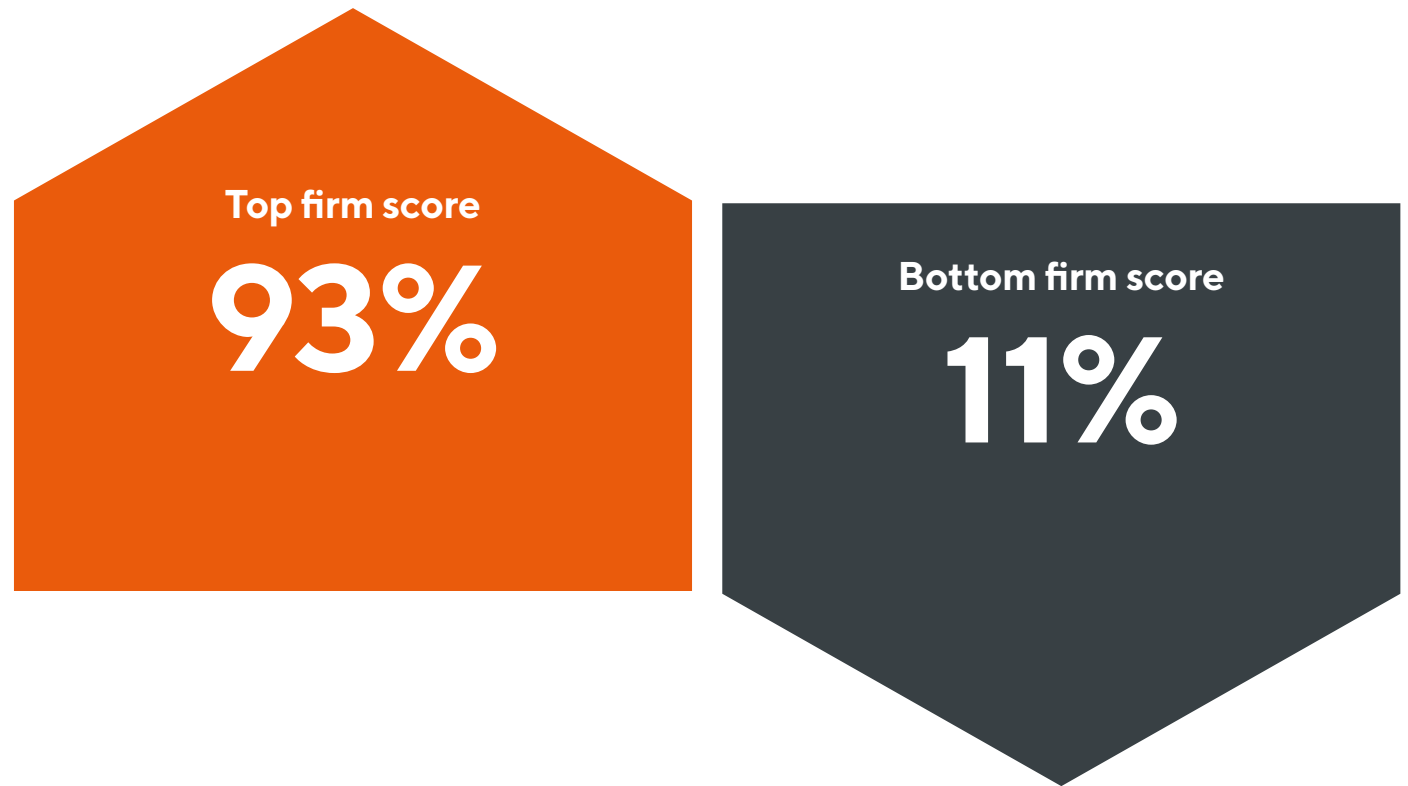


The value of a brand is under realised in private equity

Only 3 out of 22 firms met our overall brand strength benchmark scoring at least 70%; meaning, in our opinion, 86% of firms we researched have a weak brand.

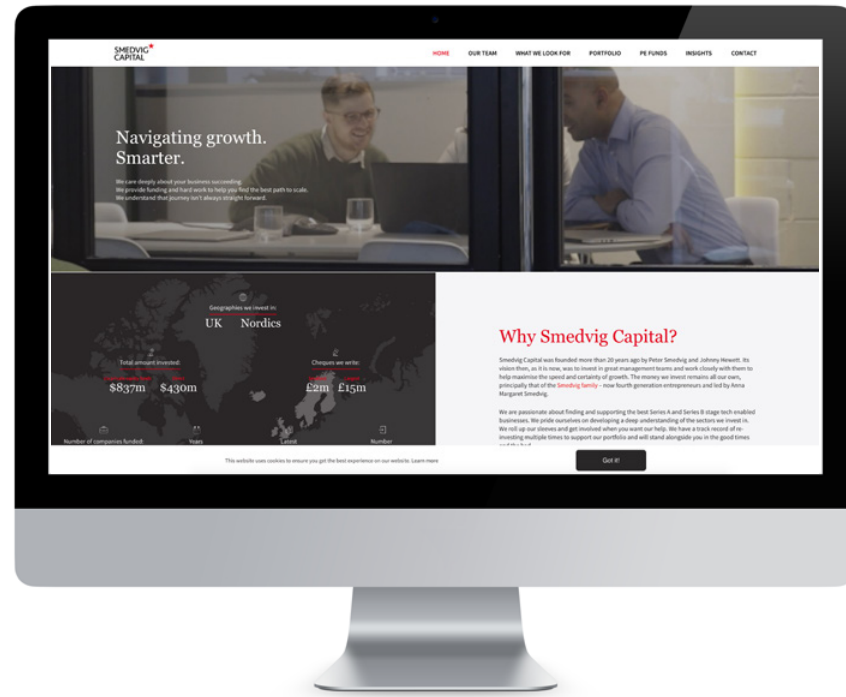
Our research found that there is a substantial difference of 82% between the scores of the top and bottom ranked firms and that all other firms are evenly spread between these two scores.

The higher scoring firms will have a discernible, brand driven competitive advantage when competing for deals and funds. For the lower scoring firms, the good news is that our research shows us that it is possible for a private equity firm to strengthen their brand.



Firms are investing in their brand strength

Since completing our research, Smedvig Capital and FPE Capital have both launched new websites which have increased their brand strength scores above our benchmark of 70%. This highlights the fact that firms in your sector are recognising the benefits of having a strong brand and are investing the time and money to improve. Firms who remain below our benchmark are at risk of being left behind by their competitors.



Clarity of positioning

The new websites improved the articulation of their purpose and mission through the use of clean layouts, simple sub headings and sincere text. For Smedvig Capital, the insights section further strengthened their position as it combines portfolio news with thoughts on industry relevant topics, demonstrating their expertise and personality.

Better navigation

Both sites enhanced their user experience by notably improving their navigation. FPE Capital in particular ensured that there are links to related content on the portfolio, team and news pages, prolonging the session duration on their site.

Six essential take homes from this report

Positive brand equity is a valuable business asset

It gives you a competitive advantage when securing deals and funds, drives business performance through enhancing your reputation, and enhances the growth of a cohesive network with the right people.

Only 14% of firms we researched have a strong brand, but this figure is rising

These firms will have more valuable brand equity and be reaping the rewards from a discernible competitive advantage. The good news for the remaining 86% of firms is that this report demonstrates that it is possible to strengthen a firm's brand. The bad news is that other firms are already launching stronger brands, meaning firms run the risk of being left behind.

Stand for something that matters and shout about it with character

In today's crowded market, a clear positioning that resonates with your investors, companies you want to work with and your staff enables you to stand out from the crowd. Amplify this with your personality and you will make it easier for people to choose or reject what you have to offer.

Meaningful audience engagement is a two-way relationship

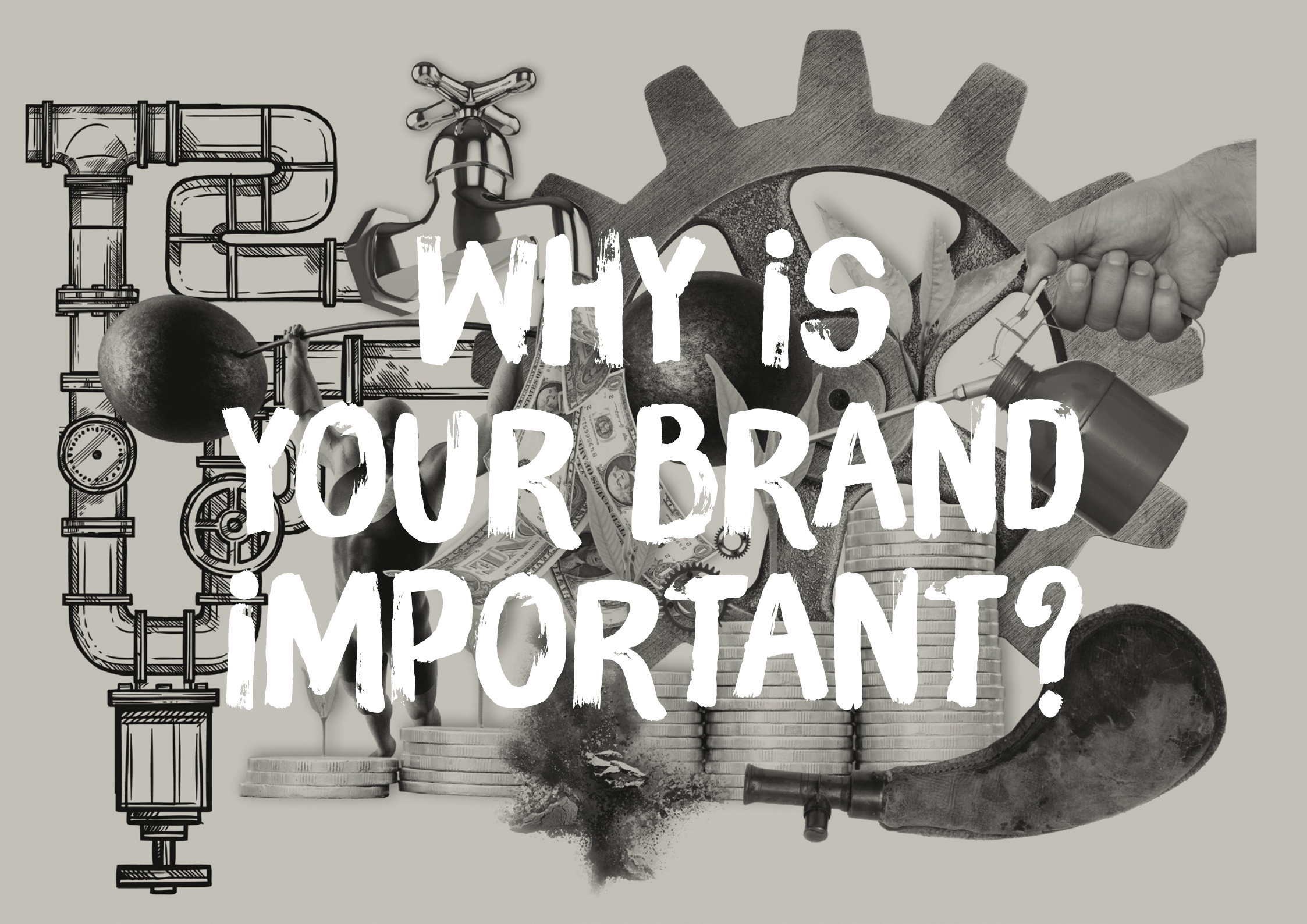
The top three firms excelled at engaging with their target audiences through the use of empathetic language and engaging in relevant conversations. Connecting with your target audience through creating and sharing original content will improve your positive brand equity by increasing the number of associations and interactions.

Brand strength is a package deal

Your brand is not just your name and logo. Strong brands invest in formulating a clear position and consistently articulate this through their mission and values as well as the user experience on their website and social media platforms.

Indifference is the enemy!

Brands elicit a response from anyone who interacts with them. You should be happy to elicit love or hate. Eliciting nothing – producing an indifferent response – is what you should be afraid of. An authentic and robust brand will self-select the like-minded people you want to do business with.



WHY is
YOUR BRAND
IMPORTANT?

Why is brand equity important in private equity?

Brand equity is the commercial value that derives from consumer perception of the brand of a particular product or service, rather than from the product or service itself. In a crowded marketplace, positive brand equity can deliver a competitive advantage to win deals and drive business performance.

Strategic differentiation leads to efficiencies

A strong brand position differentiates firms from their competitors. Investors and companies you want to work with will naturally be attracted to your brand, bringing efficiency to your business development and laying the foundations for authentic business relationships to flourish.

Amplify your reputation

In today's hyper-connected world, opinions and judgements have a powerful effect on the choices people make. When you have positive brand equity, audiences perceive your brand with loyalty and trust, strengthening your reputation and positioning you to win more deals and funds.

The right people are drawn to your firm

A clear brand position makes it easy for people to choose or reject your brand; attracting people who intrinsically connect with your purpose and values. This enables the growth of a cohesive team of talented individuals who are motivated towards the collective cause of your firm.

Your brand is more than your firm's name, logo and funds

It is a combination of these visual identity elements along with the core tenets of your brand such as your purpose, values and personality. Brand equity is a two-sided relationship; audiences today want to, and expect to, build a relationship with brands that resonate with them.

The long-term business asset

Positive brand equity results from accumulated experiences such as visiting your website, meeting you at an event or hearing about you from someone you have previously invested in. It takes a long time to build, but it is worth the investment as the benefits to your business are enduring.

“As private equity firms increasingly have to compete for dollars and deals, you must find a way to stand out. Branding is how you can differentiate yourself in the industry and get a step ahead” – *Burkhart, 2018*

How did we measure your brand strength?

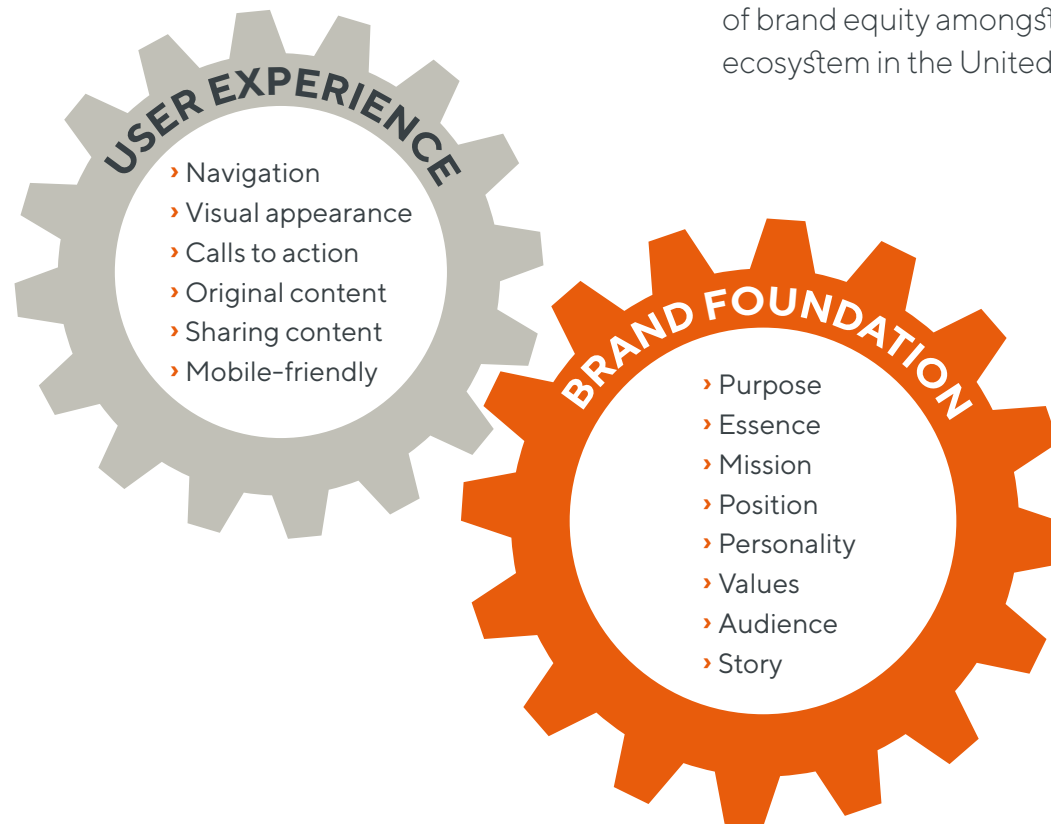
We explored the websites and social media platforms of 22 UK based mid-market private equity firms investing up to £25M in Europe. A panel of branding experts independently scored firms on the illustrated 14 key components of a strong brand (see what we looked for on p34). Scores were allocated on a 7-point scale based purely on our collective perception from the websites and social media platforms we visited.

What is a good score?

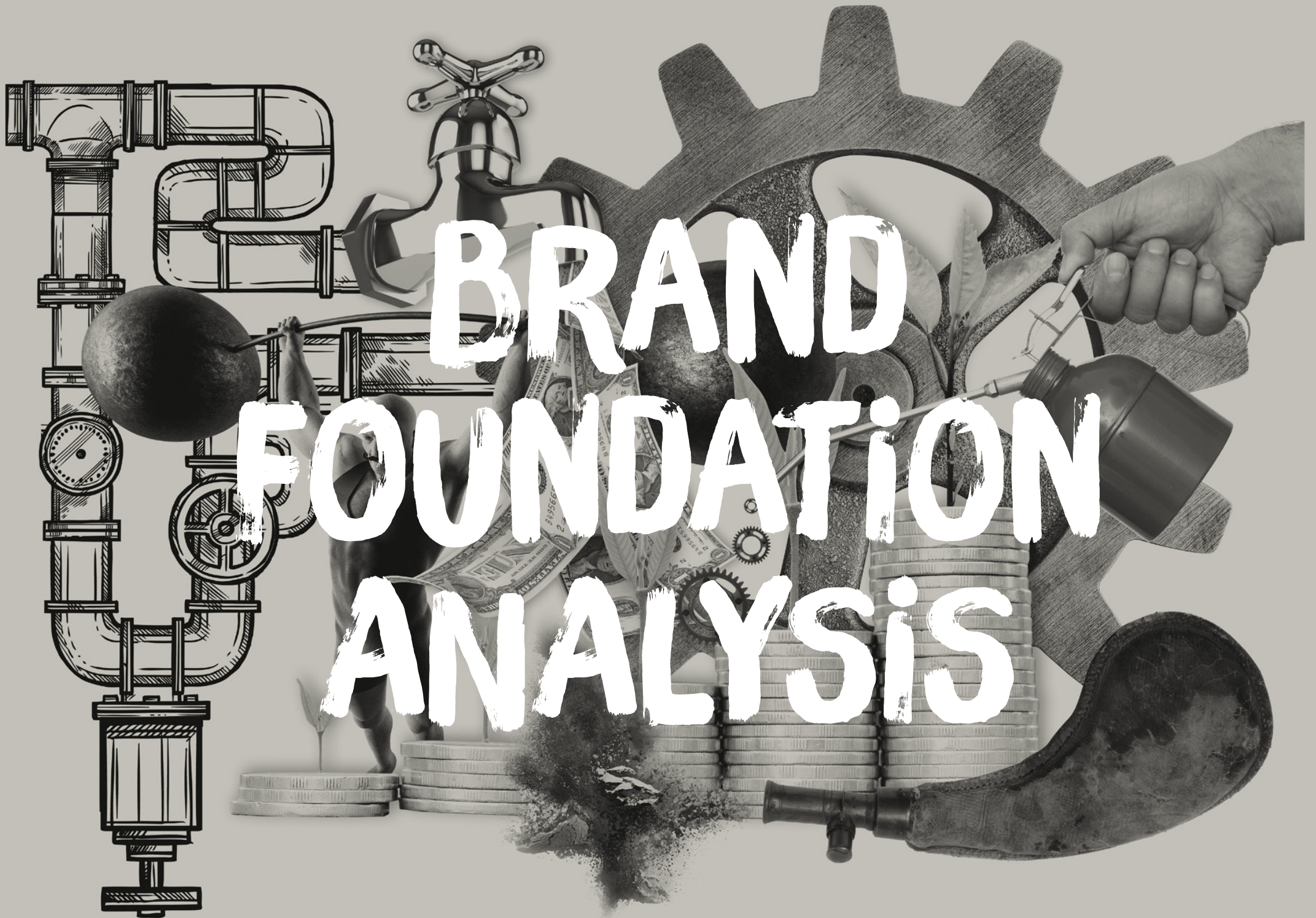
We believe that brands should be aiming to score at least 5 out of 7 (70%). This score enables brands to stand out from competitors and grow positive brand equity. Therefore we have used this benchmark throughout our analysis and report.

What will you get from this report?

This report identifies how the top firms scored more points. We also consider how our findings relate to industry relevant insight and opinions, including a series of studies called *Private Equity Brand Equity* conducted by BackBay Communications between 2009 and 2017. The research looked at the perceived relevance of brand equity amongst the private equity ecosystem in the United States and Europe.



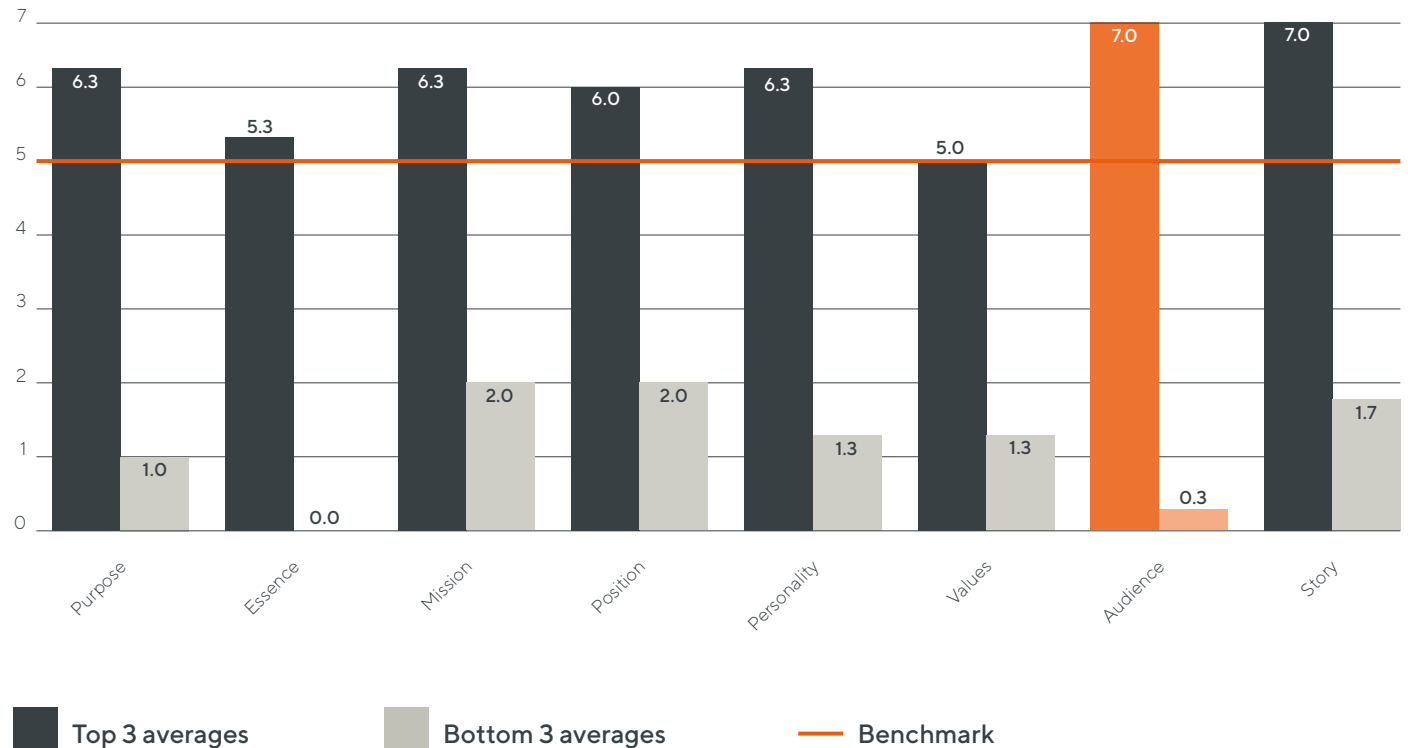
BRAND FOUNDATION ANALYSIS



Audience: Who is engaging most effectively?

The top three firms excelled at audience engagement, all scoring top marks and recording the biggest points difference between the top and bottom firms. Brands that recognise their target audience's challenges and highlight how they can benefit from engaging with the brand will connect with the right people and build positive brand equity.

Comparison of the average brand foundation scores for the top and bottom 3 firms



Our research found that on average the top three firms scored very well on audience (7 out of 7) but the bottom three firms scored very poorly (0.3 out of 7). The difference between the average for the top and bottom three firms was the largest variance across all brand foundation elements (6.7 variance).

Audience: Who is engaging most effectively?

It takes two to tango

Engagement is the act of building an emotional connection between an individual and a brand; it's reciprocal and requires both parties to participate. Websites and social media posts that stimulate relevant conversations and provide thought provoking content will achieve meaningful engagement, elicit a response and lead to the development of positive brand equity.

Empathy leads to trust

Effectively demonstrating your ability to understand and share another person's feelings helps to build not only an emotional connection but also generate trust and respect. In *Private Equity Brand Equity I*, Christopher Ullman, Director of Global Communications for the Carlyle Group noted, "our goal is to have a brand that people understand, like and trust" (cited by Haynes, 2009).

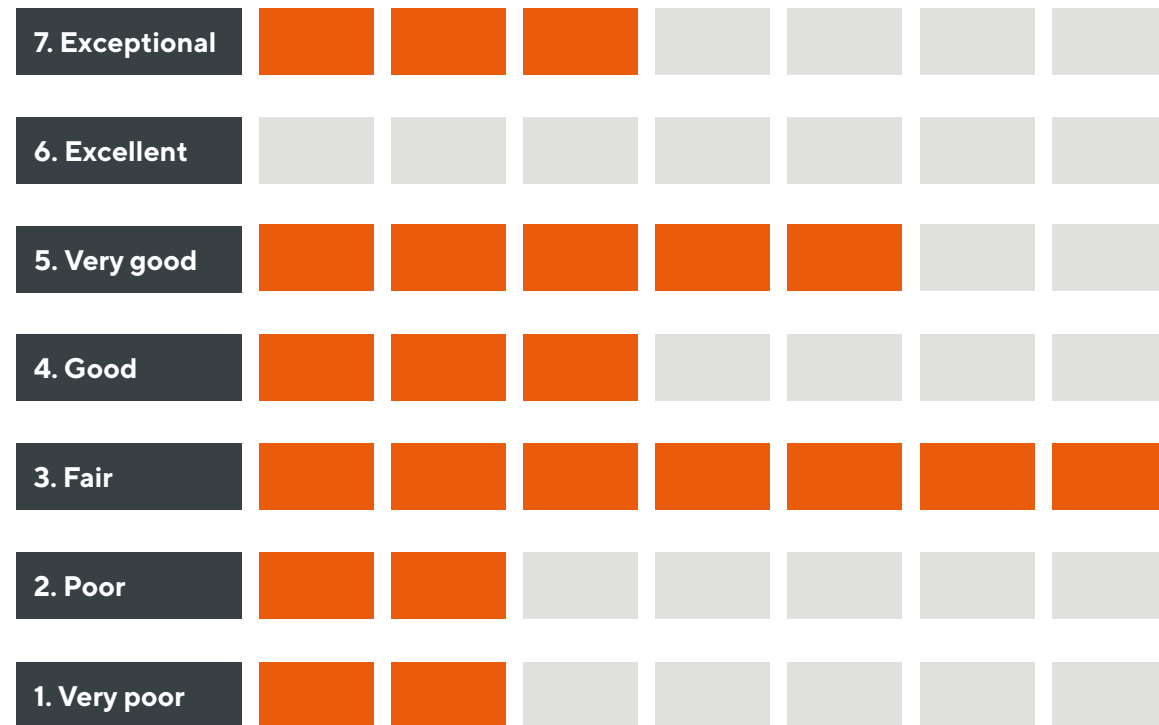
Empathy is delivered mainly through the relevance and appropriateness of your content and the language you use. Talking about how your target audience will benefit from your offer is a good starting point.

"A brand is a living entity – and it is enriched or undermined cumulatively over time. It is the product of a thousand small gestures" – *Michael Eisner, former CEO of Disney*

Position: Are you differentiating your firm from competitors?

Only a third of firms met our benchmark for positioning, indicating that there is a lack of distinction across the sector. Your position is the conceptual place you want to occupy in the minds of your audience, it clearly articulates your area of expertise. If your position is not well defined and clearly articulated, audiences will not be able to differentiate you from others, reducing their ability to choose or reject what you have to offer.

Number of firms who scored 1 – 7 out of 7 for their position



We found that 8 out of the 22 firms scored 5 or more out of 7 for their positioning. The remaining 14 firms scored 4 or below, with 50% of these firms scoring only 3 out of 7.

Position: Are you differentiating your firm from competitors?

Standing out from the crowd

Your brand should not simply alert people to your existence; it should orientate you within your competitive context, allowing your target audiences to find and choose you. A robust brand position enables you to distinguish yourselves from your competitors in a way that matters to your target market. This boosts your firm's visibility and allows you to stand out from the crowd, self-selecting the audience that wants to do business with you.

Your peers think positioning is important

The *Private Equity Brand Equity III* research found that, while business performance remains the single most effective way to build a strong brand according to 81% of survey respondents, more than 70% of respondents rated a clearly articulated firm positioning as important (BackBay Communications, 2014). Clarifying your positioning is a key part of business development; it lays the foundation for future business activity from strategically identifying target investments to purposefully closing relevant deals.

“The stronger your private equity brand and reputation, the stronger the halo – both on sources of capital as well on your investment properties” – *Deboor, 2017*

Essence: What is your rallying cry?

Great brands hook their audience with a clear, simple idea. Too often brands try to communicate too much too soon and as a result fail to penetrate their target audience. We believe that every brand should have an essence: a single, concise articulation of your brand promise.

Often, but not always, these tend to be used as straplines on homepages. Not every website we looked at had an identifiable essence, but here are a three of the most effective that we liked:

Frog Capital

The CEO's VC. Scale-up expertise and capital for tech leaders

We liked this because it clearly and simply articulates the firm's position as capital for tech scale-up companies. Their statement about being the *CEO's VC* highlights that they specialise in supporting CEOs of scale-up businesses. You know what their area of expertise is straight away.

Magenta Partners

Entrepreneurs. Backed by Entrepreneurs. Backing Entrepreneurs.

This essence clearly positions the firm as a partner for entrepreneurs. The alliteration helps to focus the reader's attention and makes the brand more memorable. If you are an entrepreneur in the SME space, this message will grab your attention and encourage you to engage further.

Mobeus Equity Partners

At key moments in the life of your business we can help

This strapline instantly forms an emotional bond by acknowledging the enormity of big business decisions on the life of the individual. Straplines don't have to be corporate; being warm and human can help to elicit trust and present your firm as approachable.

Personality: How do you express character through your brand?

Your tone of voice embodies and expresses the personality of your brand. It's not only the words you choose, but also the order and rhythm of the language used in all of your communications. Your core personality must remain consistent, however you can dial up or dial down certain elements depending on the audience or the situation to improve the effectiveness of your communication.

We really liked how Tenzing Private Equity amplified the analogy that their brand "represents our inspiration to humbly support our portfolios in summiting their ambitions each and every time" through their name, logo and language.

Name

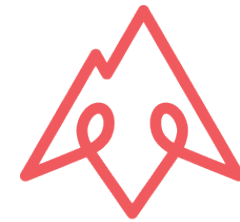
Tenzing Norgay was a Nepalese mountain climber who, with Sir Edmund Hillary, succeeded in the first ascent of Mount Everest on May 29, 1953. The name of their brand is rooted in an association to an authentic and compelling piece of history.

Logo

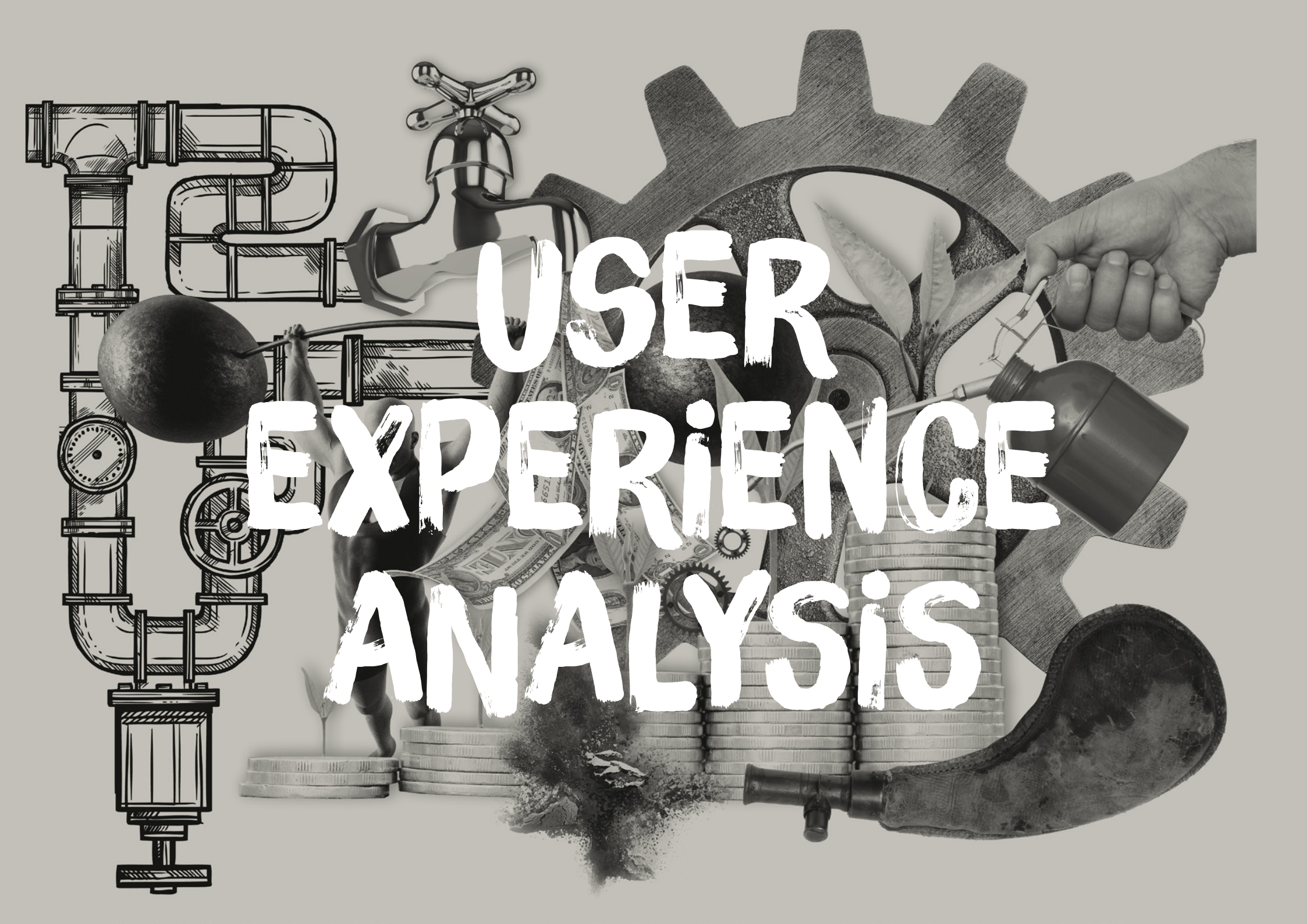
Their logo visually encompasses their purpose by the combination of the summit of Mount Everest symbolizing overcoming obstacles and the heart symbolizing unity and passion.

Language

The concept of a business expedition is echoed through their text; "we enable management teams like you to take the next step on your journey". The imagery of taking the next step on a journey amplifies the firm's position of working in partnership to conquer their clients' business summit.



TENZING
PRIVATE EQUITY

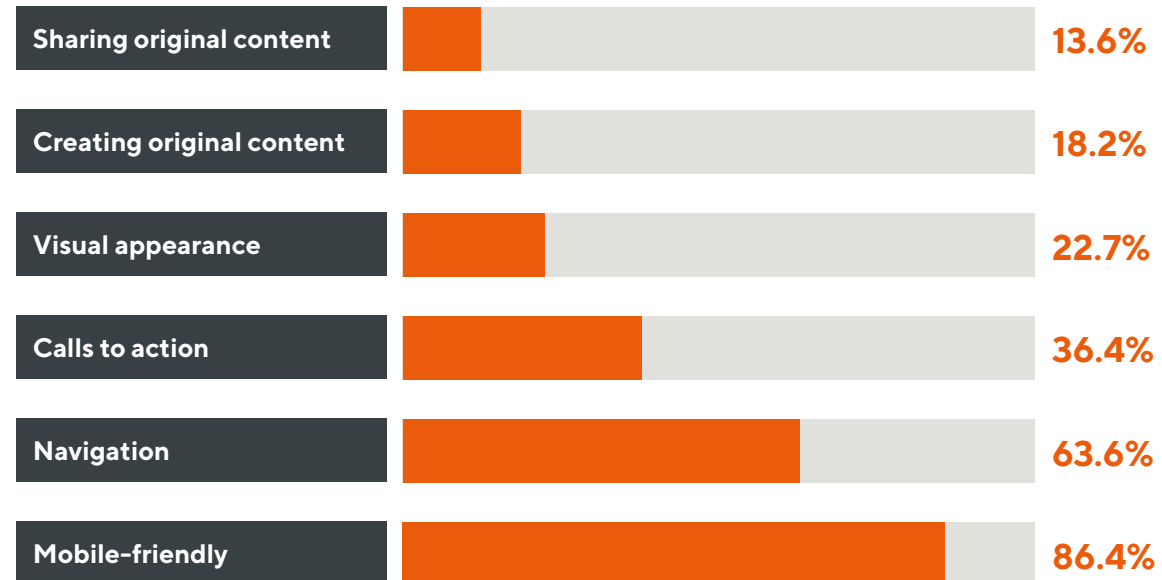


USER EXPERIENCE ANALYSIS

Content: Are you conveying your expertise and opinions?

Fewer than 20% of firms achieved the benchmark score for creating and sharing original content. Audiences are continually looking for evidence that firms are experts in what they do and for brands that strike an emotional chord. Creating and sharing original content is an effective way that private equity firms can do this, however it is an area that most of the firms we explored are not very good at.

Percentage of firms who achieved the benchmark score of 70% for the user experience elements



Our analysis found that only 18.2% of firms met our benchmark score of 70% and above for creating original content and 13.6% met the benchmark for sharing original content. These scores were the lowest scores across the six user experience elements.

Unsurprisingly, three of the firms who met the benchmark for creating original content also met the benchmark for sharing original content. This highlights that the two elements are not mutually exclusive and consideration should be given to what content needs to be created and how it is best to share it.

Content: Are you conveying your expertise and opinions?

News sections are simply hygiene factors

We found that pretty much all firms had a news section on their website, making them a hygiene factor. Unquestionably firms need to demonstrate that they have a successful track record with deals, but audiences also want to learn from your insights and experiences.

Regularly demonstrate your expertise to grow brand equity

Frequently sharing relevant and original content enables you to maintain your reputation of expertise. This is because people will come across your brand through multiple touch points and over a prolonged period of time, repeatedly influencing their perception of your expertise and building brand equity.

Connect emotionally to open gateways to deals

Content that demonstrates your opinions and thoughts enables audiences to connect with your brand on a human level. Audiences want to know what you stand for and if your personality and views are compatible with theirs. In a marketplace with increasing choice, audiences that feel an emotional connection will enter into deals with you and become advocates for your brand.

“Having a strong brand that keeps popping up in a positive way that has real teeth and attributes is critical” – *Graham Hearn, The Riverside Company (cited by BackBay Communications, 2014)*

Mobile-friendly: Are brands living up to people's digital expectations?

In today's digital age, people expect to be able to access information online anytime and anywhere. In 2009 only 0.7% of web traffic worldwide was generated through mobile phones, but in 2018 this rose to 52.2% (Statista, 2018).

In response to this powerful mobile search trend, Google have recently introduced mobile-first indexing, which will see sites that are not mobile-friendly drop down the Google rankings.

It is good to see that 19 out of 22 firms in our research have a mobile-friendly website, enabling them to live up to contemporary digital expectations. Those websites that have not yet embraced the mobile-friendly world are at risk of being overlooked as visitors leave the site, never to return.

Not mobile-friendly



Mobile-friendly

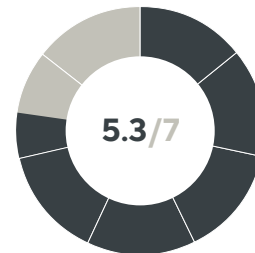


“In many countries, the number of smartphones has surpassed the number of personal computers; having a mobile-friendly website has become a critical part of having an online presence” – *Google, 2018*

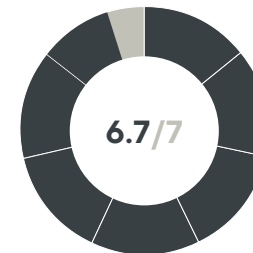
User experience: How do you create a meaningful customer journey?

The top three brands consistently scored very well across all user experience components, highlighting that brand strength is inextricably linked to user experience. User experience refers to how a person feels when interacting with a service and product. We think that it is reasonable to extrapolate that time invested in formulating a clear brand proposition and articulating it in a holistic manner repays in a clearer, more meaningful user experience.

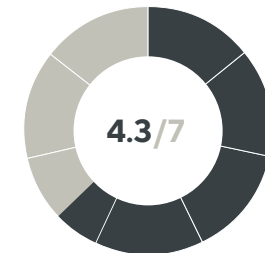
Average user experience scores for the top 3 companies



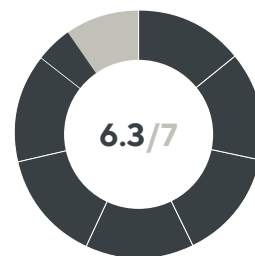
Sharing original content



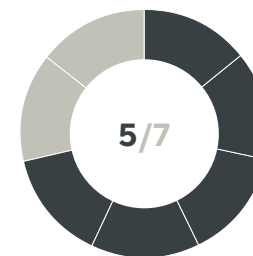
Creating original content



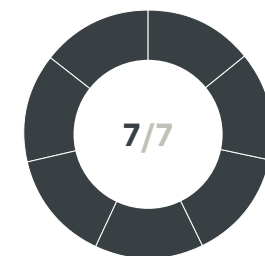
Navigation



Visual appearance



Clear call to actions



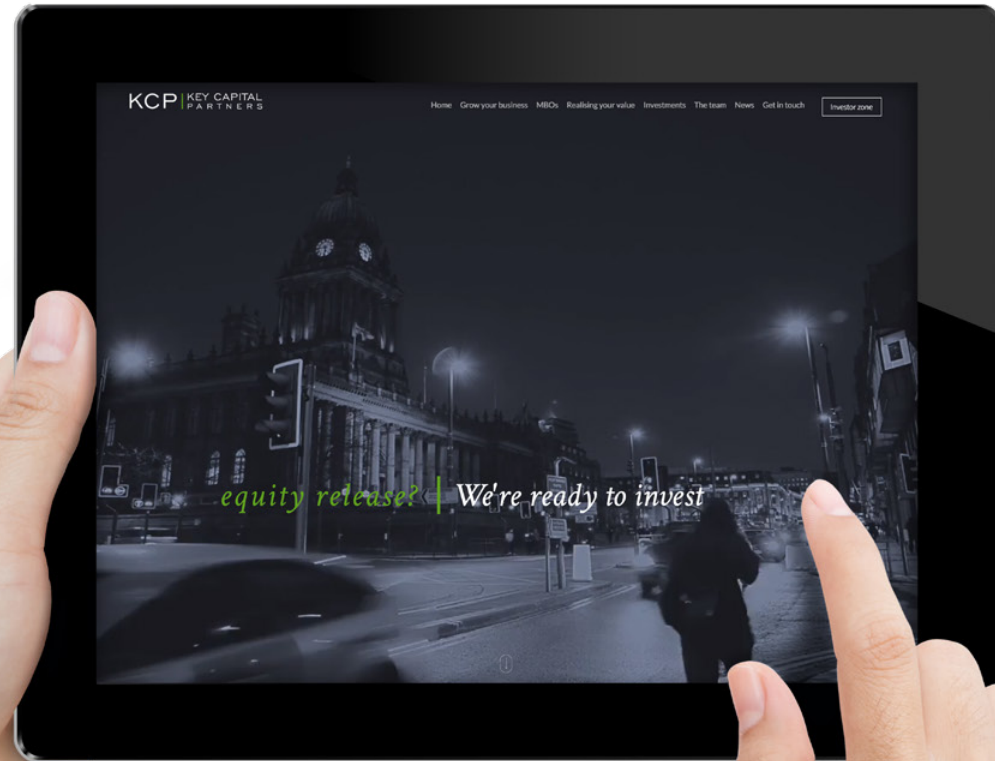
Mobile-friendly

We found that the top three firms, all of whom achieved our overall benchmark score, scored more than 5 out of 7 for all elements except navigation, which was only 0.7 away.

Conversely, with the exception of mobile-friendly, the bottom five firms scored below 5 out of 7, demonstrating that user experience elements are not mutually exclusive.

User experience: How do you create a meaningful customer journey?

We felt that Key Capital Partners delivered a meaningful customer journey through the purposeful and complimentary use of their essence, navigation and calls to action. All of these elements put the customer first, primarily emphasising how they can benefit rather than what the company offers, unlike many of their competitors.



User experience: How do you create a meaningful customer journey?



1. Essence: Pertinent and predominant

Key Capital's strapline *We're ready to ...* is promoted throughout the website in prevalent visual locations and tailored to the copy it accompanies. This predominance enables them to amplify their brand promise.

2. Navigation titles: Simple and relevant

Using navigation titles that guide users on a journey that is most conducive to their needs leads to the growth of positive brand equity. Terminology such as *Grow your business* and *Realising your value* is purposely user centric, clearly indicating the content of the pages and how it is relevant to the target audience.



3. Calls to action: Timely and approachable

All sites we explored had a *Contact Us* page, but we liked how Key Capital embedded their call to actions within each page, directly after content that promoted the firm's expertise and how investments will benefit from working with them.

THE SCORES



How did firms score, including yours?

A personalised scorecard has been created for each firm in the research, including itemised scores and our thoughts on their brands. As an example, the top three firm's scorecards are included in this report on pages 30-32. These scorecards also provide some interesting insights on how the top firms scored more points.

How can this information be utilised?

This report is a measure of our perception, as brand experts, of brands in this segment of the private equity industry. We have benchmarked firms based on our opinion and this overview

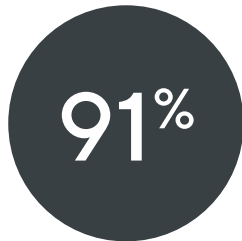
should be considered alongside further exploratory work with senior partners, staff and clients to form a comprehensive review of your brand strength.

If you wish to receive your firm's scorecard contact Ed Bowes at ed@incorporatedesign.co.uk

Ranking



Score



Scores at or above benchmark

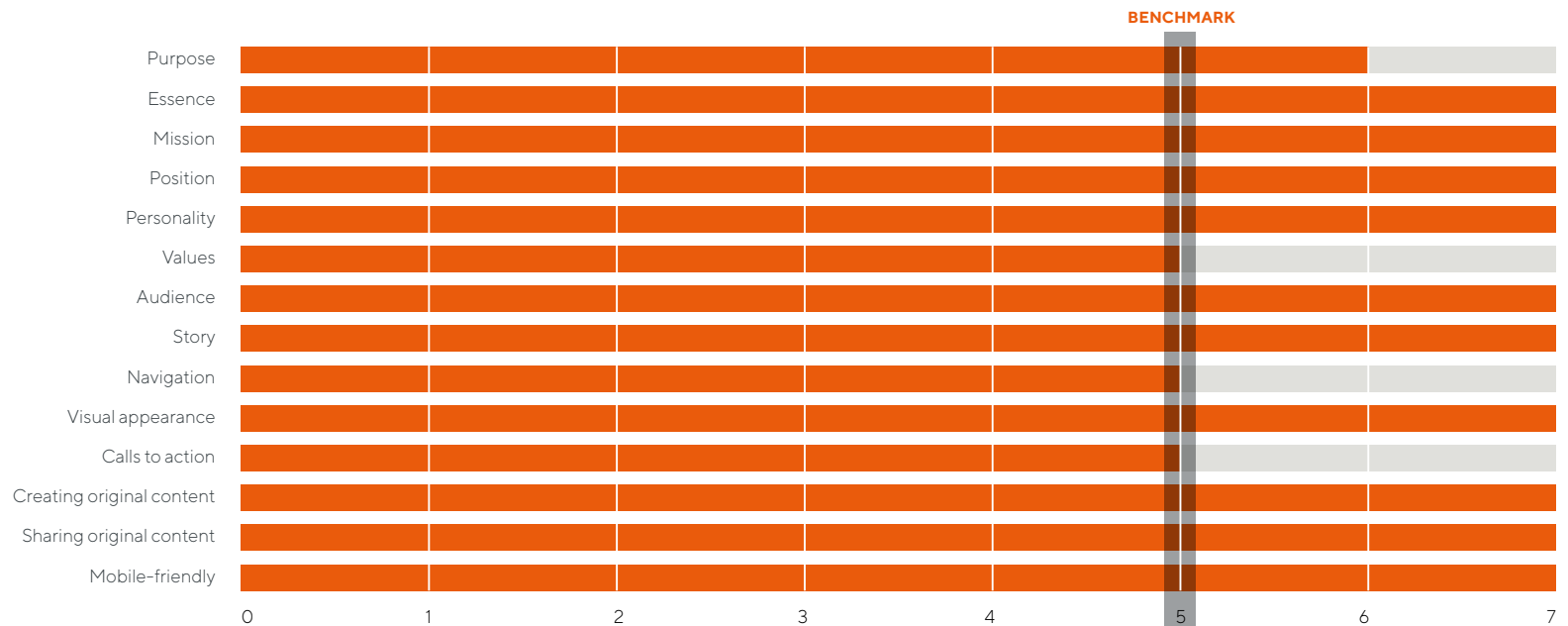
14/14

Brand Foundation score

53/56

User experience score

38/42



Our thoughts

Mission

The explanation of a scale-up methodology is communicated with simplicity and relevance, and conveys expertise and experience.

Creating original content

The range of original content on the website is very engaging and innovative, from the Frog Book Club to the videos for portfolios.

Audience

Use of language such as, "You're building a great business", focuses on and emotionally engages with the target audience from the outset.

Navigation

The portfolio pages lead to a dead end. There is a link to the client's website but no link to further information on the Frog Capital website such as similar portfolios or Think Frog content.

Calls to action

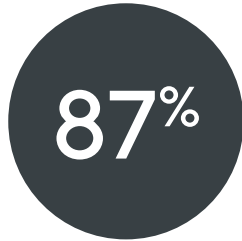
We thought that the calls to action could have been stronger. Whilst the *Contact Us* page is easy to find, the actions audiences should take from certain pages could be more compelling.

Values

We felt that whilst the copy was written with a well-defined personality, a clearer articulation of the firm's values could improve the authenticity of the brand.

Ranking

Score



Scores at or above benchmark

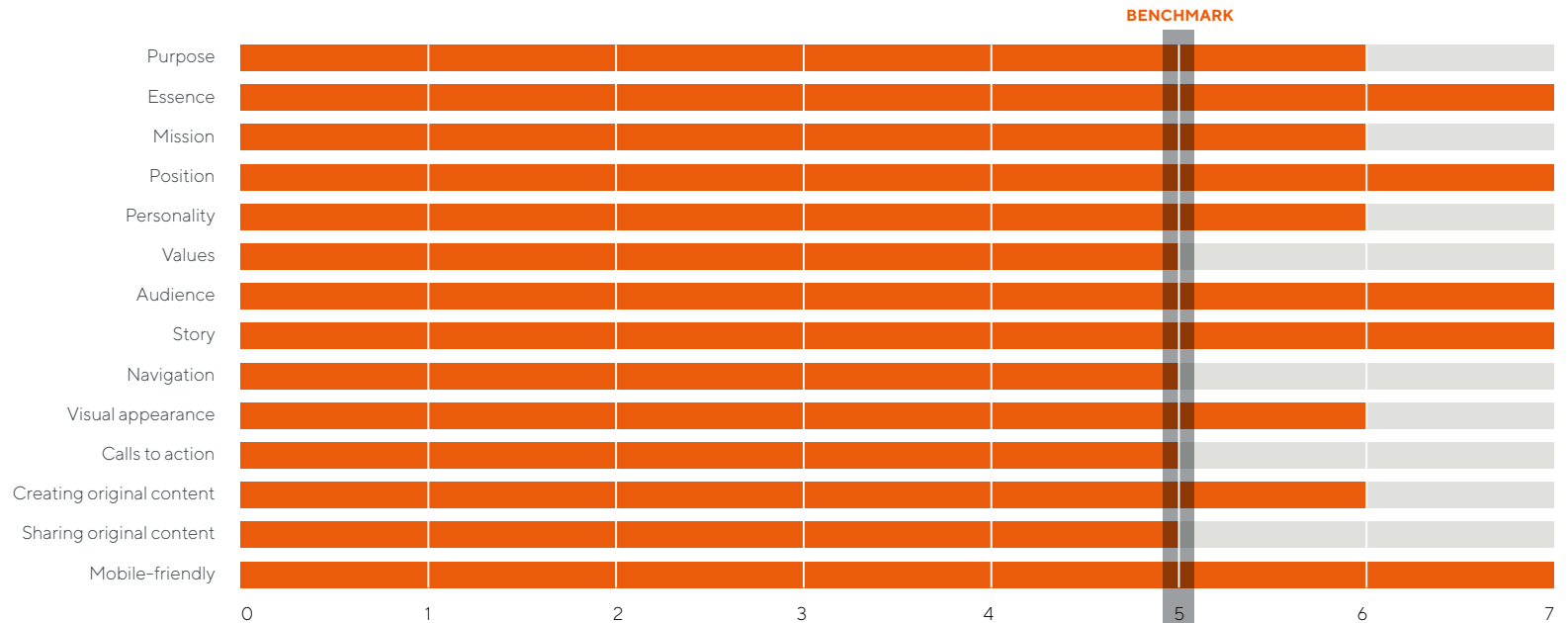
14/14

Brand Foundation score

51/56

User experience score

34/42



Our thoughts

Personality

Testimonials reinforce a personable tone of voice and we thought the electronic signatures on the *About Us* page added a nice human touch.

Creating original content

The range of original content on the website is modern and innovative. Podcasts and videos are an engaging way to convey opinions, and the blogs like *Paws for thought* are relatable and fun.

Position

The firm's position is clearly articulated on the *About Us* page and in the company strapline, "We grow brands consumers love". We thought this position was complimented well by the photos used on the website.

Sharing original content

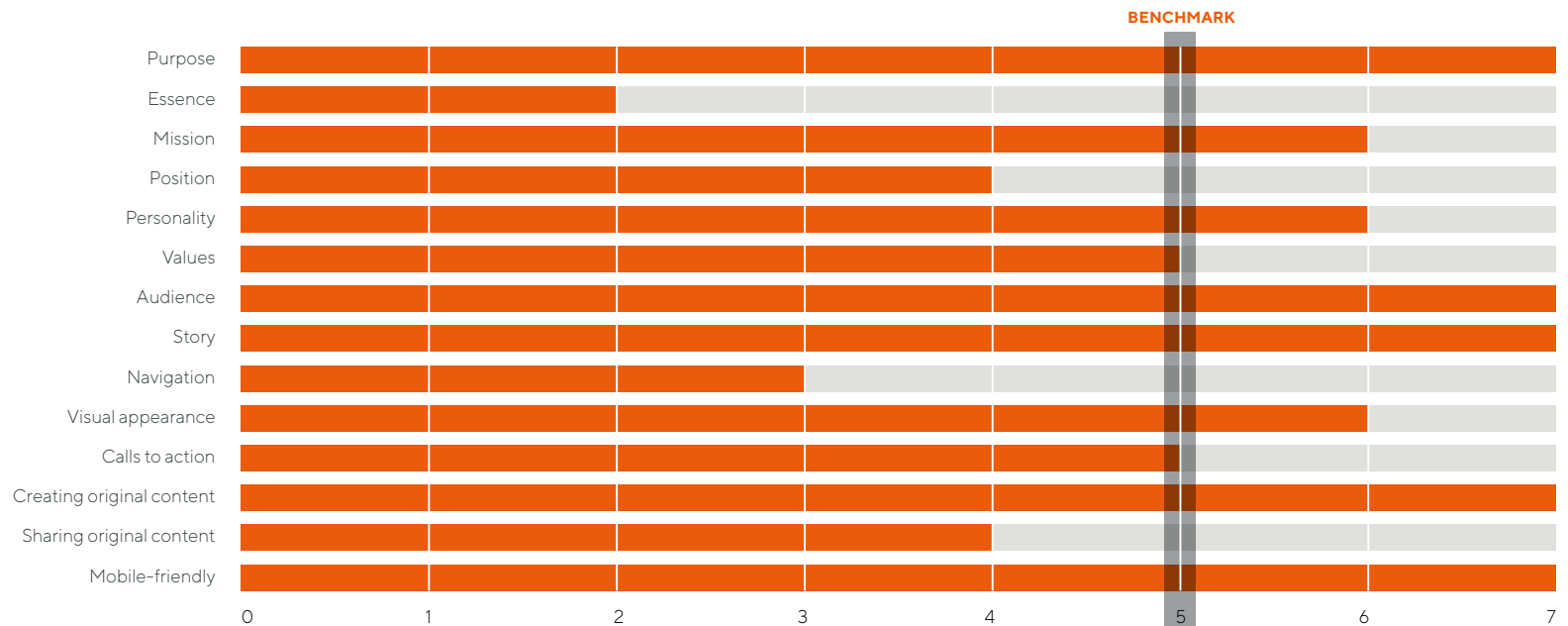
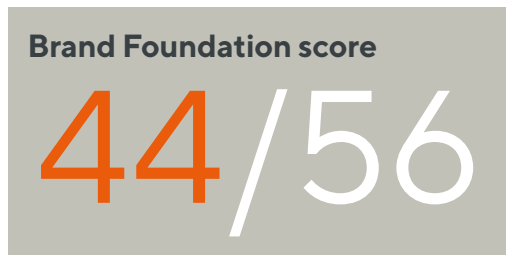
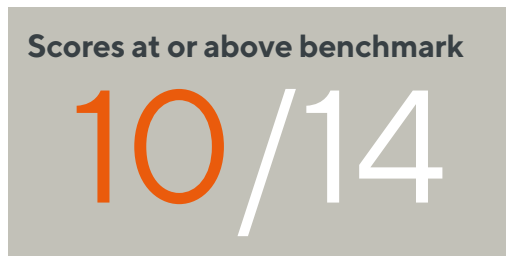
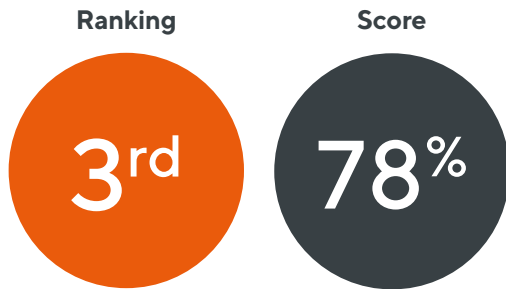
There are no links to social media platforms on the website, reducing the ability for audiences to regularly engage with the firm beyond their visit.

Navigation

The navigation experience on the homepage could be enhanced with subheadings to introduce sections and make them easier to digest.

Values

The authenticity and individuality of the brand could be enhanced by the inclusion of values to reflect the firm's culture and standards.



Our thoughts

Personality

We really liked how Tenzing conveyed their cooperative and ambitious personality through their name, logo and use of language.

Creating original content

The *Inspiration* and *Chronicles* pages provide beneficial insights and highlight opinions on relevant and interesting topics. We liked how this was kept separate from the *News & Press* page.

Audience engagement

We thought that language such as “walking in your shoes” was particularly engaging as it showed authentic empathy and understanding for audience needs.

Essence

The predominant scrolling images and straplines on the homepage refer to services and portfolios. A clear articulation of the firm's purpose in such a prominent location instead would improve brand strength.

Navigation

There are pages under the *About Us* and *You & Us* menus and the *Inspiration* and *Chronicles* menus with similar themed content that could be more clearly articulated in fewer pages.

Values

We liked that values were declared, however with the exception of 1:10:1 there is no explanation of what audiences can expect from the other values listed.

APPENDIX
AND
REFERENCES

What we looked for

Audience

Is it clear who your target audience is? Do you recognise their challenges? Do you communicate how they can benefit from your firm? Do you show empathy? Are you looking to engage in conversations on a human and emotional level?

Call to actions

How easy is it to find contact details? Is it clear what action you need to take on each page? Are you inspired to take an action to engage with the brand?

Creating original content

Is there relevant content such wider information sharing and the promotion of industry events/forums? Does the firm produce insight-led and opinion based information? Is information communicated in a variety of ways (e.g. videos)?

Essence

What is the single, concise articulation of your brand promise? Is it clearly visible on your website? Is it memorable?

Mission

What actions are you taking to make your purpose a reality? What are your tactics?

Mobile-friendly

Can the website be viewed on a smart phone?
Can the copy be read? Is navigation intuitive?
Does the website look visually appealing?

Navigation

How easy is it for people to find information?
Does the website help you to find other relevant information? Can you find your way back to previous pages easily? Did the pages load quickly?

Personality

What are the tone of voice and behavioural characteristics that make your brand unique?

Position

How does your brand orientate itself within its competitive context. What are the key metrics of your business sector or industry? What positions do your competitors adopt? Where are the opportunities for differentiation? Will any of these be meaningful for potential customers?

Purpose

What is your brand's ultimate goal? What will the world be like once your brand has achieved all it sets out to achieve. How do you want to change the world? *You need to stand for something*

more than what you sell and 'making a profit' isn't reason enough for someone to become emotionally engaged.

Sharing original content

Does the firm promote original content on multiple channels? How wide is the firm's information sharing network? Are audiences engaged with the information?

Story

Do you communicate your work with a compelling narrative? Is there a clear beginning (the challenge/ambition), middle (what you did) and end (the outcome) with your portfolio stories?

Values

What are the criteria that drive your actions; the beliefs you hold dear; the benchmarks against which you are prepared to be judged? *You are looking for reasons to win business, not the reasons to do business in your sector.*

Visual Appearance

How impactful is the visual first impression? Is it contemporary and modern? Is it inline with your brand? Is there a good balance of copy and images?

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