CASE STUDY

Understanding the modern advisor: how Orion used research to identify the trends shaping wealthtech

THE CHALLENGE

Orion provides wealthtech solutions and investment management services that help advisors manage investments, operate more efficiently, and better serve clients.

To better understand advisor priorities and how industry trends are shaping advisory firms, Orion partnered with Applied Marketing Science (AMS) to gather insights on wealthtech, business growth, and the evolving needs of advisors.

WHAT WE DID

The research consultants at AMS worked closely with Orion to design and execute the fourth annual Advisor Wealthtech Survey.

AMS's quantitative online study captured insights from financial advisors on key topics such as technology challenges, investment and planning priorities, and emerging trends affecting firm growth.

CLIENT
Orion

INDUSTRY
Banking, Investing, Insurance

SERVICES
Brand Research

KEY TAKEAWAY

These insights equip Orion to better align its strategy with evolving advisor needs, prioritize solutions that accelerate growth, and strengthen its competitive position in an increasingly data-driven wealthtech landscape.

THE OUTCOME

The survey highlighted key factors shaping technology adoption and growth opportunities for financial advisors.

Key findings include:

- **Rising importance of integrated tech & data**
    - Advisors are increasingly focused on getting more value from their technology and improving how data connects across their firms.
- **AI emerging as a force multiplier**
    - Artificial intelligence continues to be a growing focus for advisors, both in the near term and over the longer term.
- **Sustained growth and continued expansion is driven by technology adoption**
    - Advisors using Orion solutions reported significantly higher growth compared to those not using these tools.
- **Utilization of outsourced services**
    - Advisors are increasingly using outsourced services to save time and focus more on the work that matters most to clients.

These insights equip Orion to better align its strategy with evolving advisor needs, prioritize solutions that accelerate growth, and strengthen its competitive position in an increasingly data-driven wealthtech landscape. Orion showcased these findings at its annual Ascent conference, including in the CEO’s keynote, and leveraged them across marketing efforts throughout the year.

Looking to make more informed, data-driven decisions? Connect with AMS to explore how tailored research can bring clarity and direction to your strategy.