

**“Self-directed investing is a lot easier when...”**

## **Online Brokerage Messaging Test**



The following 6 messages were tested among Canadians 18-65+ years old:

## **Self-directed investing is a lot easier when...**

you're with the right partner.

you're armed with the right tools.



you're with the best rated online brokerage.

your online brokerage empowers you.

you get online guidance.

you have the right support.



# Summary

**“Self-directed investing is a lot easier when you’re armed with the right tools.”**



## RECOMMENDATION

We recommend to proceed with **“Self-directed investing is a lot easier when you’re armed with the right tools”** as a primary message. It ranks highest by general public of Canadians 18-65+ years old, especially to those who do investing themselves/online and to those who do not have investments as the phrase which would make you want to learn more about an online brokerage. Overall, it is the top message across all segments.

We recommend to consider **“Self-directed investing is a lot easier when you have the right support”** as a secondary message for this campaign. It is as strong as “you’re armed with the right tools” to the general population and especially among those who do not have investments as the phrase which would make you want to learn more about an online brokerage.

**“Self-directed investing is a lot easier when you have the right support.”**



When continuing “Self-directed investing is a lot easier when...” for the phrase which would make you want to learn more about an online brokerage, “You’re armed with the right tools” and “You have the right support” are the messages that rank highest.

## All Respondents

N=105

### “Self-directed investing is a lot easier when...”



Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...

Both Male and Female respondents rank “You’re armed with the right tools” as the phrase which would make them want to learn more about an online brokerage.

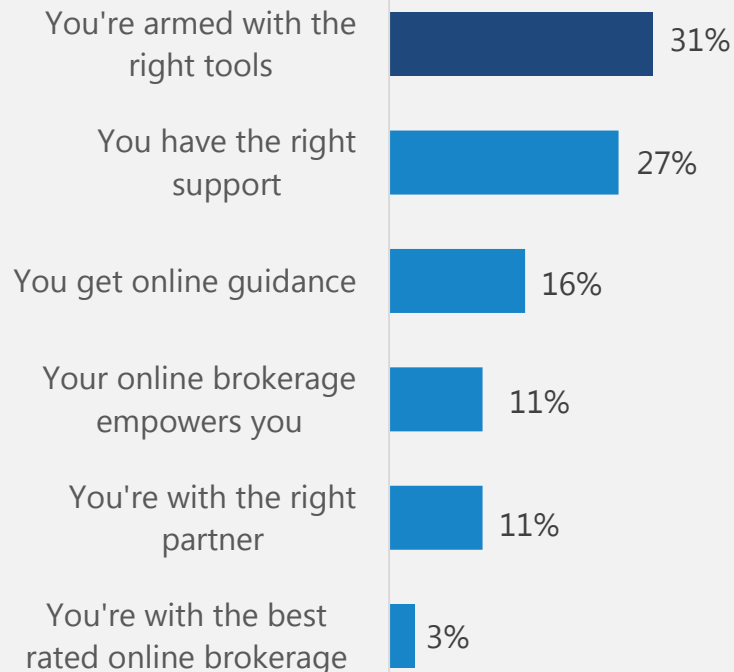
## All Respondents: Gender\*

N=105

### “Self-directed investing is a lot easier when...”

#### Males\*

N=70



#### Females\*

N=63



\* Each gender includes the equal amount of respondents with unknown genders, n=28.

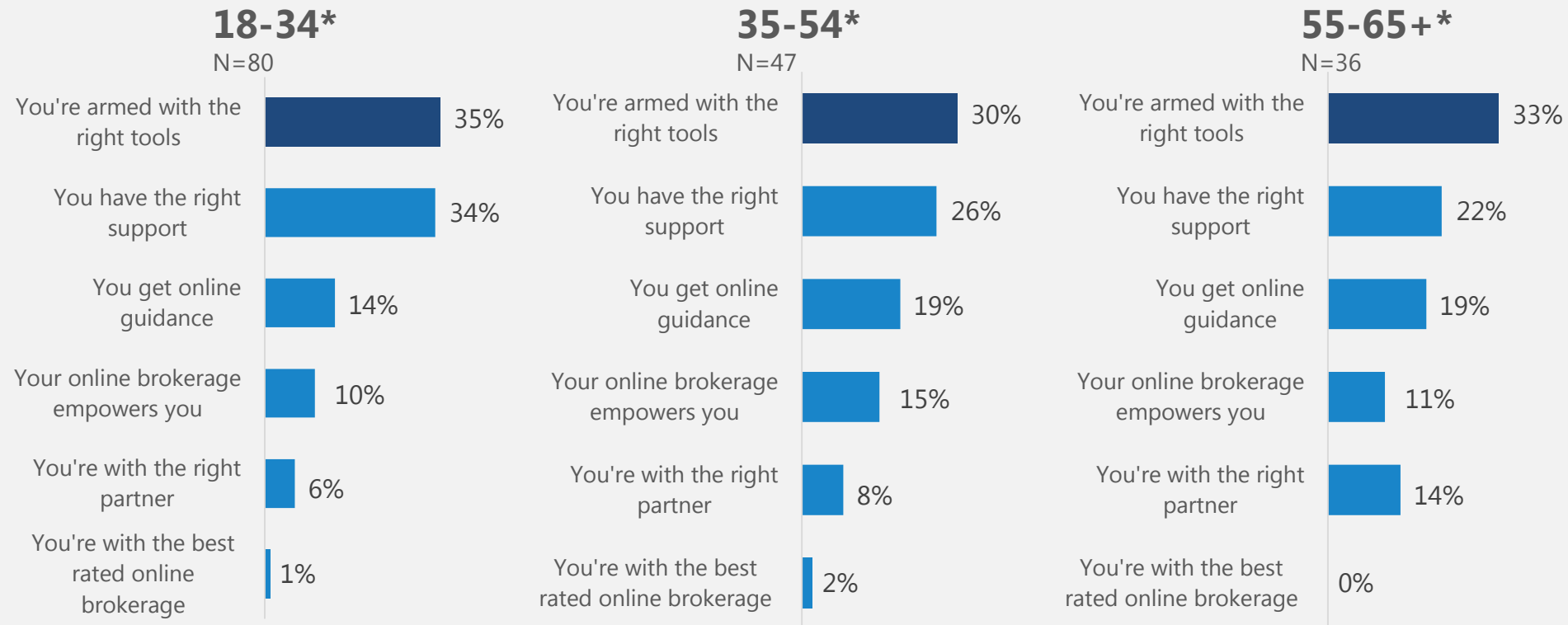
Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...

Further, all respondent age-groups rank “You’re armed with the right tools” as the phrase which would make them want to learn more about an online brokerage.

## All Respondents: Age\*

N=105

### “Self-directed investing is a lot easier when...



\* Each age group includes the equal amount of respondents with unknown age, n=28.

Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...

Meanwhile, "You're armed with the right tools" ranks highest among those who do investing themselves and/or do investing online as the phrase which would make you want to learn more about an online brokerage.

## Do investing themselves/online

N=38

36% of Canadians 18-65+ y.o.  
in our sample admitted that  
they do investing  
themselves/online

### "Self-directed investing is a lot easier when..."



Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...

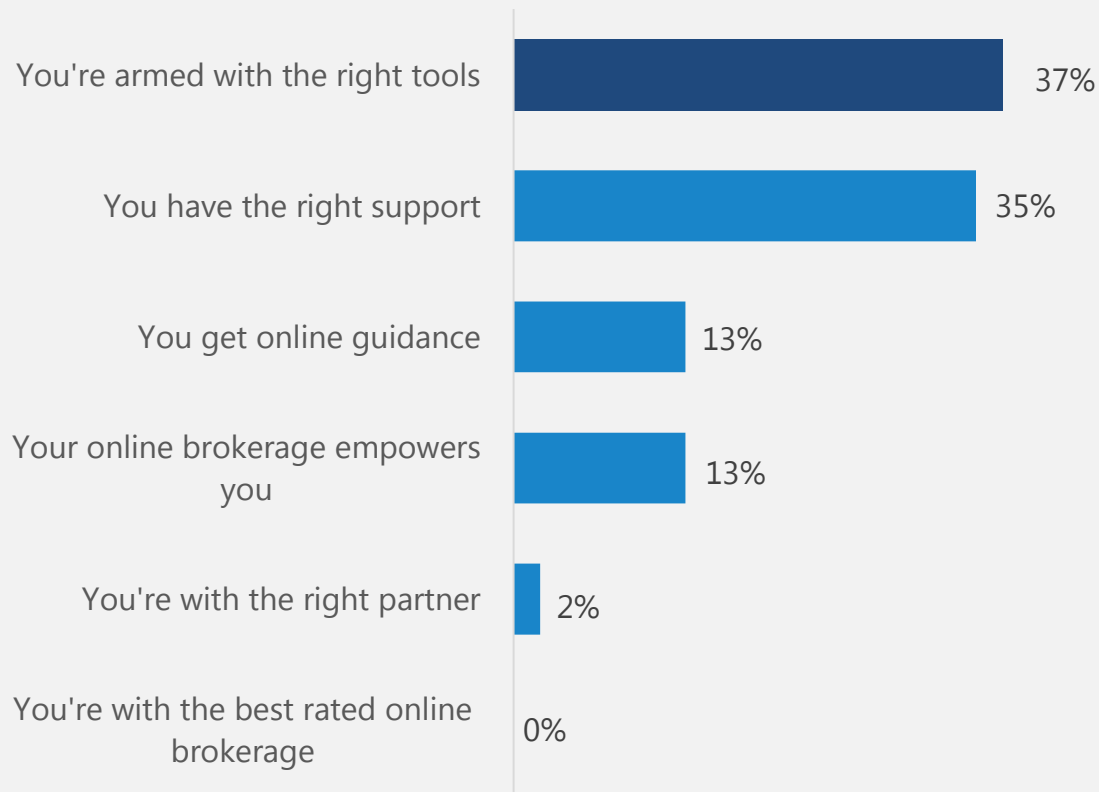
While, “You’re armed with the right tools” and “You have the right support” are the messages that lead among Canadians who do not have investments as a phrase which would make you want to learn more about an online brokerage.

## Do not have investments

N=46

44% of Canadians 18-65+ y.o. in our sample admitted that they do not have investments

### “Self-directed investing is a lot easier when...



Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...



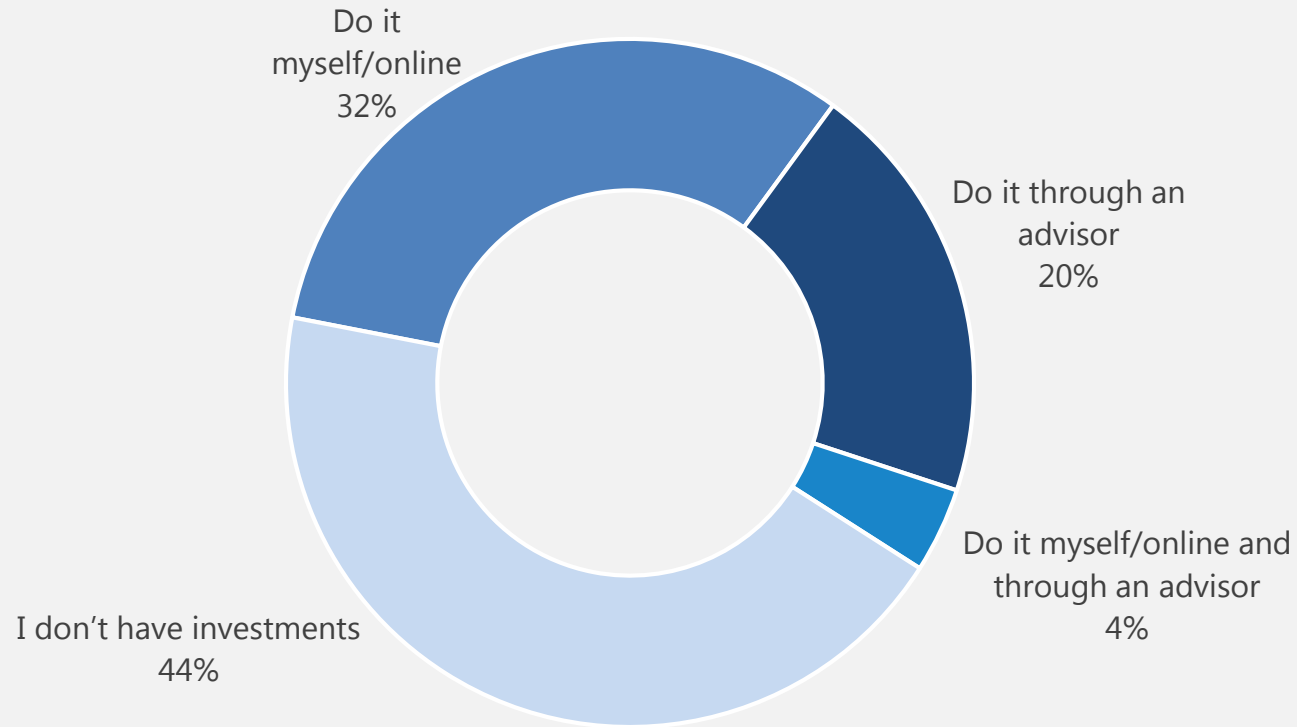
# Methodology and Sample

# Methodology

- Four questions were asked to n=105 Canadians 18-65+ years old across the country using Google Consumer Surveys with research conducted by the ValidateIt™ platform. Representative distribution across the regions and demographic groups was assured by Google Consumer Surveys.
- Like many ads on the web, Google Consumer Surveys reports on the inferred age and gender of anonymous respondents based on their browsing history, and location based on IP addresses.
- In field: June 4-6, 2015
- Q1 How do you currently invest your cash, deposits, savings, RRSPs, RRIFs, TFSAs ,bonds, stocks, mutual funds and investment properties excluding primary residence?
- Q2 Total approx. value of your investments (cash, deposits, savings, RRSPs, RRIFs, TFSAs, bonds, stocks, mutual funds, investments properties) excluding primary residence:
- Q3 Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...
- Q4 Which of the following is most important to you when choosing an online brokerage (Select all that apply):

When it comes to investing, 36% of Canadians respondents 18 – 65+ years old do it themselves and/or online, and 24% do it through an advisor. While 44% do not have investments.

## Current Method of Investing



All Respondents  
18 – 65+  
N=105

How do you currently invest your cash, deposits, savings, RRSPs, RRIFs, TFSAs, bonds, stocks, mutual funds and investment properties excluding your primary residence?

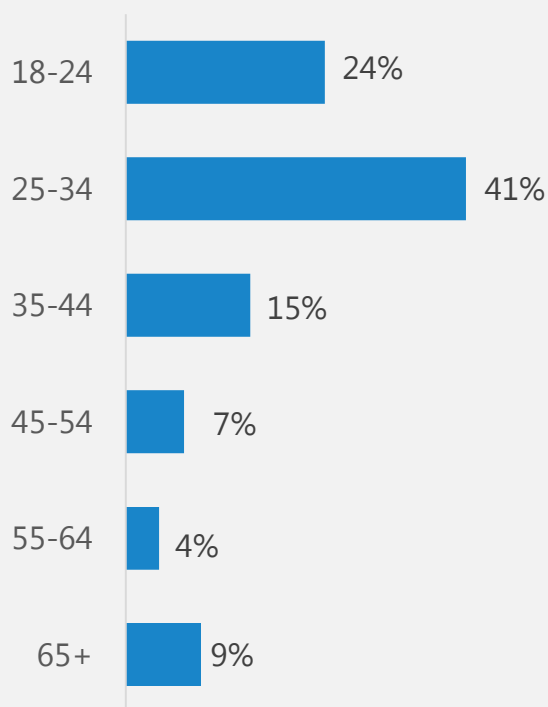
35% of those who do investing are 35+ years old. 70% of those who don't have investments are 18-34 years old.

## Age of Respondents

N= 76

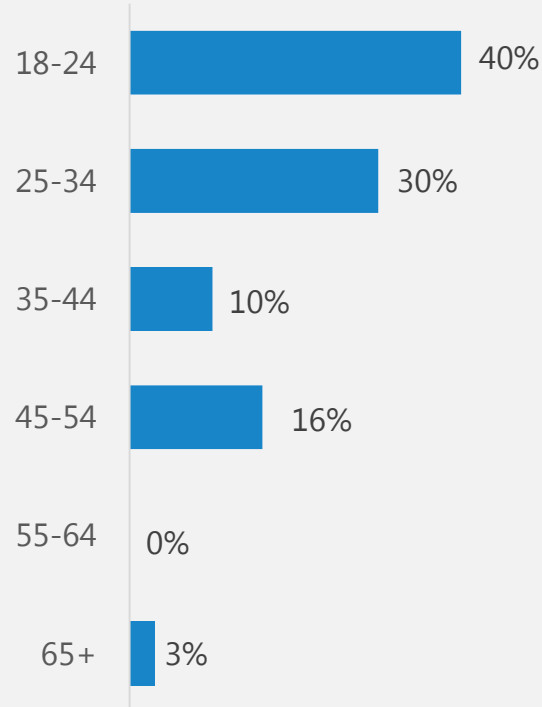
### Do Investing (Themselves/Online or Through Advisor)

N= 46



### Don't Have Investments

N=30



How do you currently invest your cash, deposits, savings, RRSPs, RRIFs, TFSAs, bonds, stocks, mutual funds and investment properties excluding your primary residence?

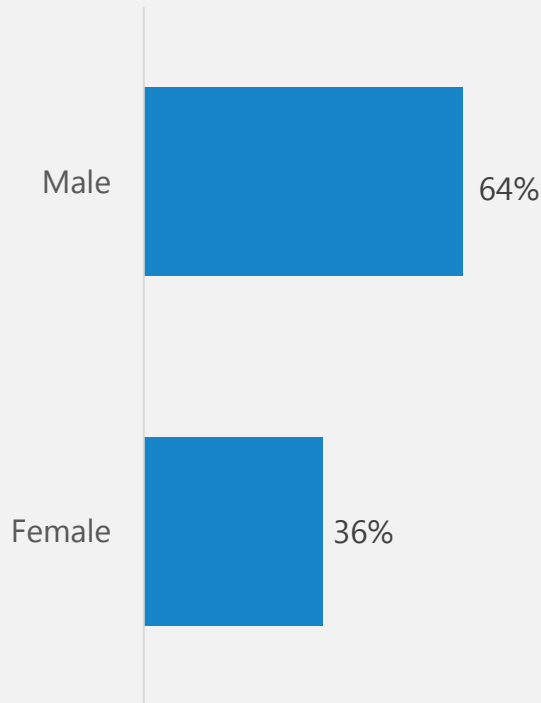
64% of those who do investing (themselves/online or through an advisor) are Male. 60% of those who don't have investments are Female.

## Gender of Respondents

N= 76

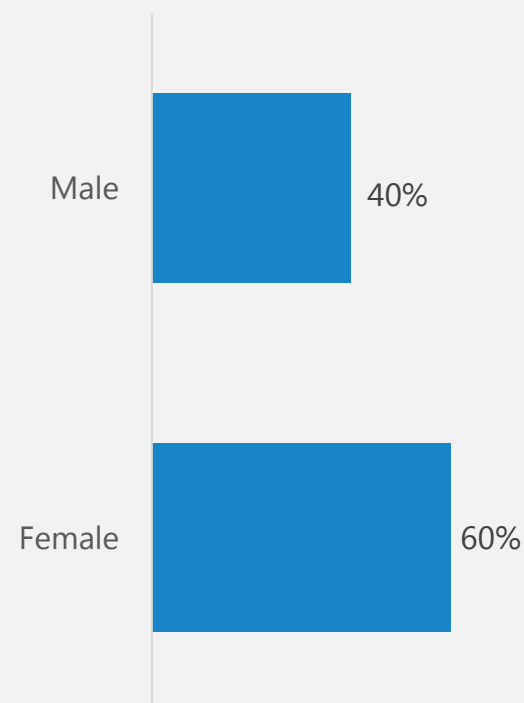
### Do Investing (Themselves/Online or Through Advisor)

N= 46



### Don't Have Investments

N=30



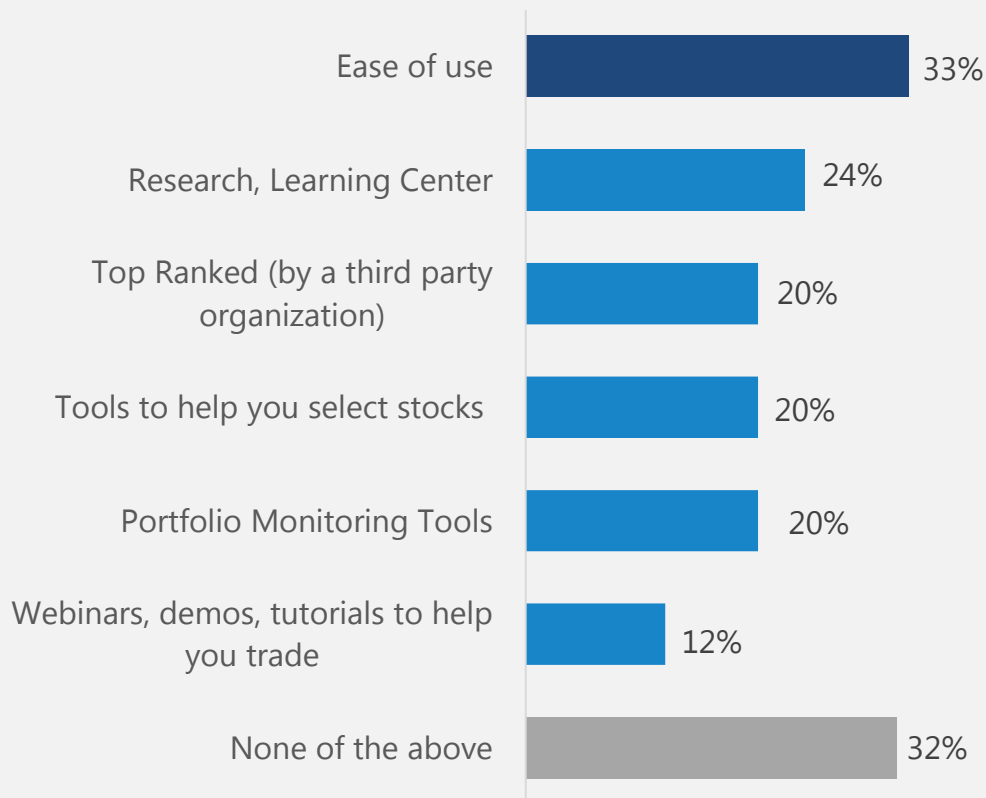
How do you currently invest your cash, deposits, savings, RRSPs, RRIFs, TFSAs, bonds, stocks, mutual funds and investment properties excluding your primary residence?

33% of Canadians aged 18-65+ selected "Ease of use" as most important when choosing an online brokerage.

## All respondents

N=105

### Most Important When Choosing Online Brokerage



Which of the following are the most important to you when choosing an online brokerage? (Select all that apply):

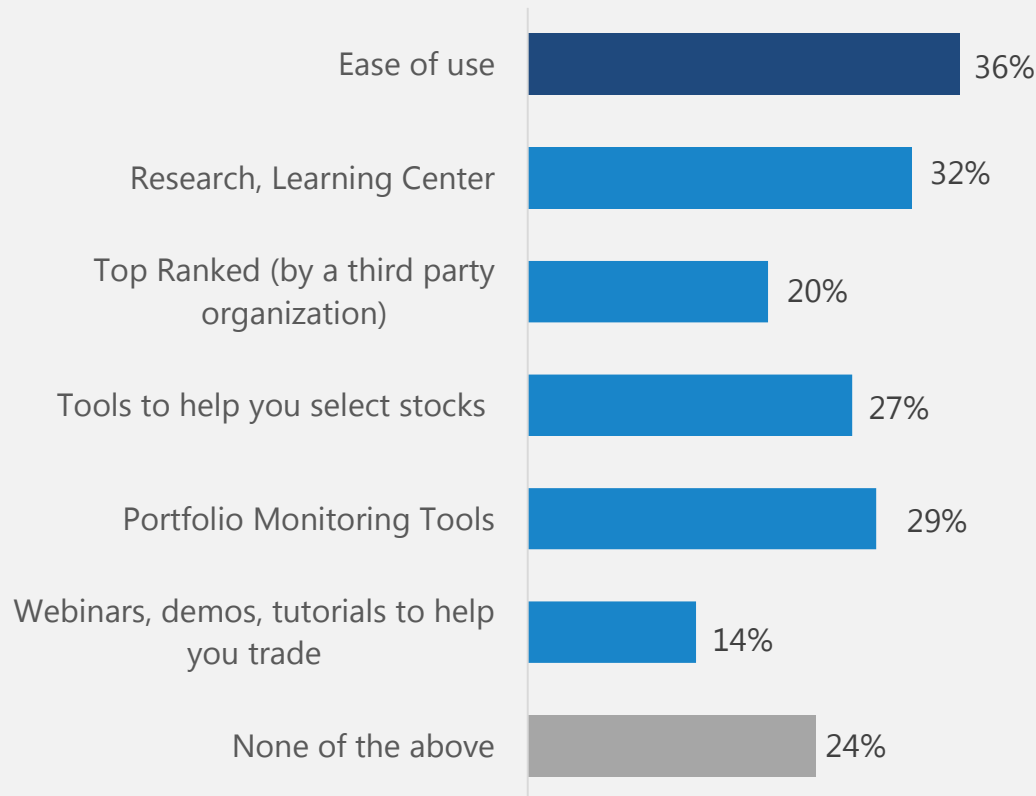
Among those who do investing themselves/online and/or through an advisor, “ease of use” and “research, learning center” lead as most important when choosing an online brokerage.

## Do Investing (Themselves/Online or Through Advisor)

N=59

56% of Canadians 18-65+ y.o. in our sample admitted that they currently do investing themselves/online and/or through an advisor..

### Most Important When Choosing Online Brokerage



Which of the following are the most important to you when choosing an online brokerage? (Select all that apply):

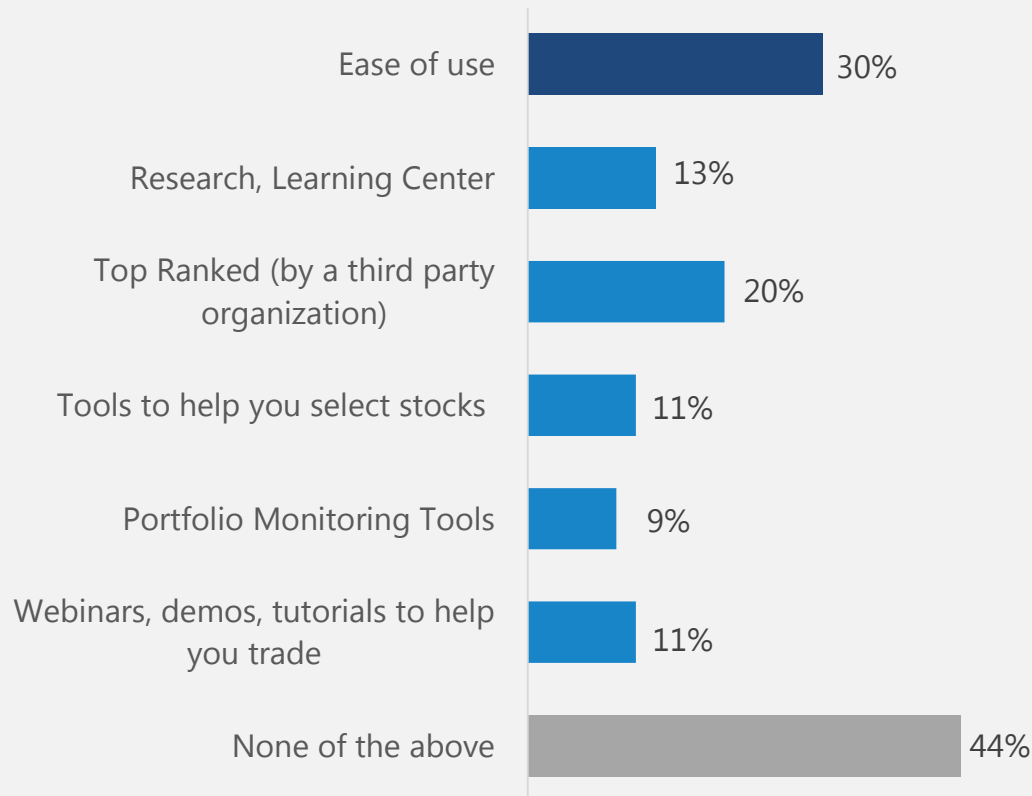
Those who do not have investments, “ease of use” and “top ranked (by a third party organization)” lead as most important when choosing an online brokerage.

## Do not have investments

N=46

44% of Canadians 18-65+ y.o.  
in our sample admitted that  
they do not have investments

### Most Important When Choosing Online Brokerage

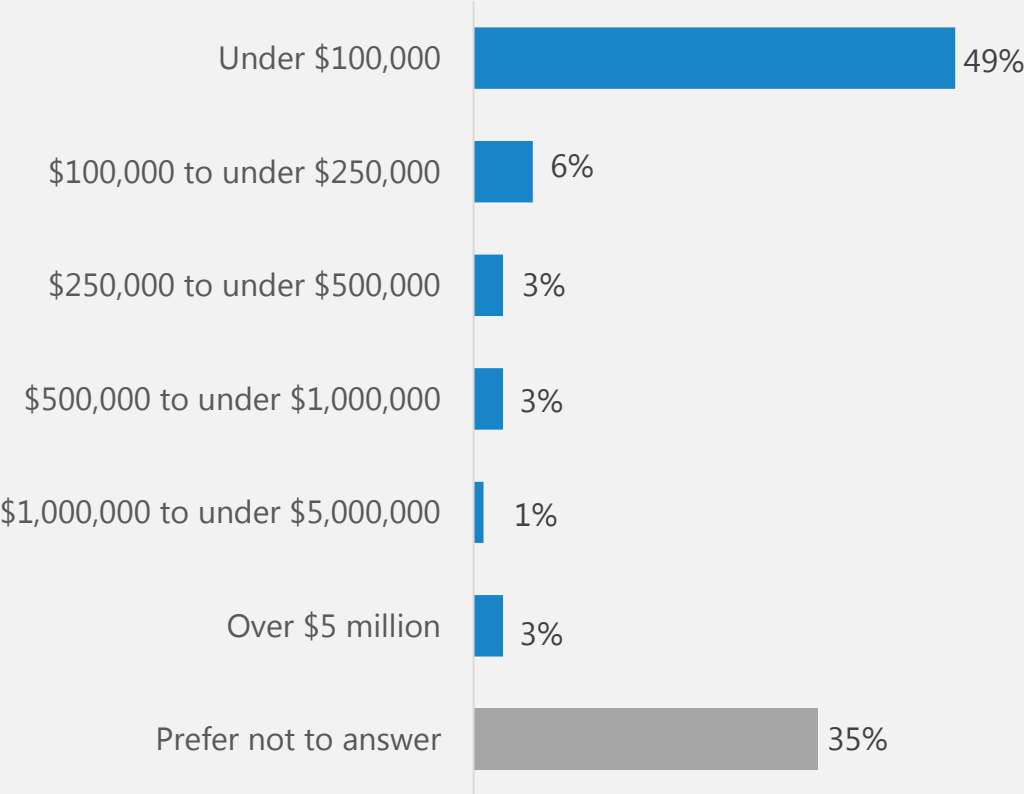


Which of the following are the most important to you when choosing an online brokerage? (Select all that apply):



16% of Canadians respondents in our sample have a total approximate value of investments of \$100,000 or greater.

## Total Approximate Value of Investments



All Respondents  
18 – 65+  
N=100

Total approx. value of your investments (cash, deposits, savings, RRSPs, RRIAs, TFSAs, bonds, stocks, mutual funds, investment properties) excluding primary residence:

# Thank You

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