

High Net Worth 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.

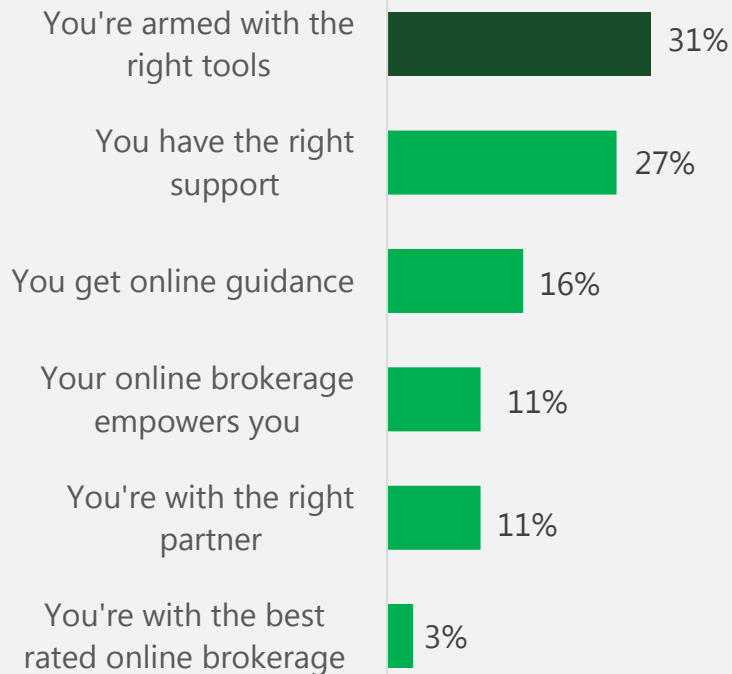
All Respondents: Gender*

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.

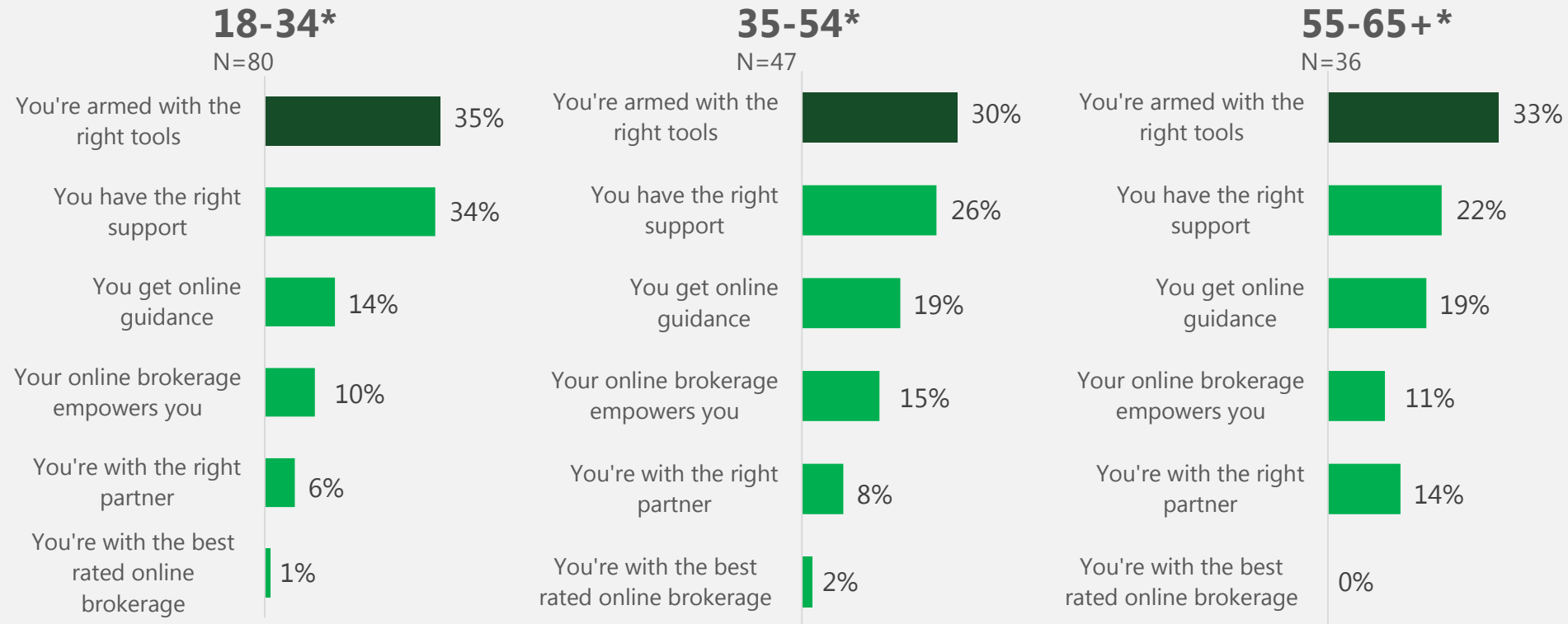
Continue the sentence with the phrase which would make you want to learn more about an online brokerage: Self-directed investing is a lot easier when...

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...

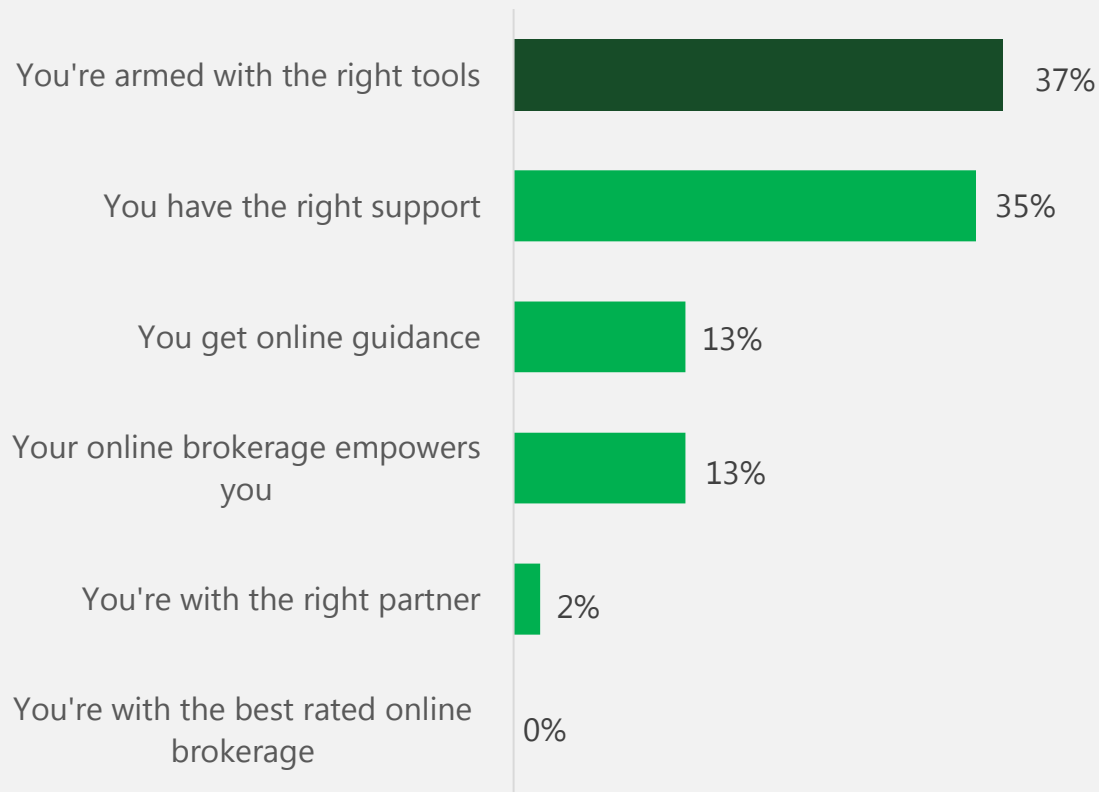
While, “You’re armed with the right tools” and “You have the right support” are the messages that lead among Canadians who do not have investments as a phrase which would make you want to learn more about an online brokerage.

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):

Thank You

<http://www.validateit.com/>

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