

Investment Trends - US - February 2016

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The economy is strengthening, the stock market has been volatile, and interest rates remain low. The recession hit portfolios hard, and many people adjusted their investing behavior, with some becoming more aggressive and others more conservative.

This report looks at the following areas:

- Do they have investment account(s) and, if so, what kind?
- How much do they have invested in taxable and tax-advantaged retirement accounts?
- What are their investment plans for the next 12 months?
- How do they feel about robo-advisers?
- How do they plan to adjust their investment strategies to fit their vision of the US economy?

Different generations have different investment goals and allocate their investment portfolios accordingly. This report will examine how investors view investing whether – and how – they have changed their investment goals.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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Table of Contents

Overview

What you need to know

Definition

Executive Summary

The issues

A disconnect that indicates lack of understanding

Figure 1: Attitudes toward investing, December 2015

Ownership of financial assets is increasingly concentrated

Figure 2: Family financial holdings, selected years 1989-2013

Only one-third have a tax-advantaged retirement account

Figure 3: Ownership of tax-advantaged retirement account, by demographic segments, December 2015

The opportunities

Robo-advisers balance requirements accessible to many

Figure 4: Reason for not having an investment account, by gender and marital status, December 2016

Millennials are looking to invest more

Figure 5: Future investment plans, by generation, December 2015

Banks have an opportunity with Millennials

Figure 6: Location of non-retirement accounts, Millennials, December 2015

What it means

The Market – What You Need to Know

Total net assets of investment companies tops \$18 billion

Number of investment firms is falling

Market Size

Total net assets of investment companies tops \$18 billion

Figure 7: Total net assets of investment companies, 1991- 2014

Change in financial asset ownership

Figure 8: Percentage of families holding financial assets, by type of asset, selected years 1989-2013

While some families have more assets, most have less

Figure 9: Family financial holdings, selected years 1989-2013

Market Breakdown

Number of investment firms is falling

Figure 10: Number of investment firms, 1997 - 2014

Equities dominate mutual funds

Figure 11: Breakdown of mutual funds, 2014

ETFs continue to challenge mutual funds

Figure 12: ETF market, 2005 - 2014

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Market Factors

Disposable income is increasing, personal savings is increasing more

Figure 13: Disposable personal income (DPI), personal savings, personal savings as a % of DPI

Aging of America influences investments

Figure 14: Willingness to trade risk for reward, by generation, December 2015

Key Players – What You Need to Know

A strengthening stock market

Retirement confidence is increasing

Industry is losing advisers

The growth of robo-advisers

Changing fee structures to attract Millennials

Gift cards for stock make investing more accessible

What's Working?

The stock market has been strong

Figure 15: DJIA, monthly averages, Jan. 1, 2011-Jan. 1, 2016

Retirement confidence is increasing

Figure 16: Percentage of workers who are confident about having enough money for a comfortable retirement, 2008-2015

What's Struggling?

Industry is losing advisers

Figure 17: Want to work with advisers like themselves, by generation, October 2015

Investors are mixed on the need for advisers

Stock ownership is declining

Figure 18: Percentage of families who own stock either directly or indirectly, selected years 1989-2013

What's Next?

The growth of robo-advisers is disrupting the industry

Figure 19: Use of robo-advisers, by type of investment account, December 2015

Figure 20: Use of robo-advisers, by generation, December 2015

Figure 21: Vanguard Personal Advisor Services and Betterment online ads, 2015

Human advisers are still in demand

Changing fee structures to attract Millennials

Figure 22: Reasons for not having an investment account, December 2015

Gift cards for stock make investing more accessible

The Consumer – What You Need to Know

Most consumers have some type of investment account

Millennials prefer to hold non-retirement investment accounts at banks

Retirement contributions are steadier than non-retirement contributions

Hispanics and non-Whites make their own investment decisions

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Millennials are optimistic and want to invest

Investment Account Ownership

About half of consumers have some kind of investment account

Figure 23: Investment account ownership, December 2015

Blacks are less likely to have any type of investment account

Figure 24: Investment account ownership, by race, December 2015

Location of Investment Accounts

Institutions have to fight harder for non-retirement accounts

Figure 25: Location of investment accounts, by type of investment account

Millennials prefer banks for non-retirement investing

Figure 26: Location of non-retirement investment accounts, by generation, December 2015

Self-directed accounts are more popular among men

Figure 27: Location of non-retirement investment account, by gender and age, December 2015

Why Consumers Don't Have an Investment Account

Most feel they don't have enough money

Figure 28: Reasons consumers don't have an investment account, by gender, December 2015

Women's interest in investing grows with age

Figure 29: Reasons for not having an investment account, by gender and age, December 2015

Once household income reaches \$75K, lack of money is less a reason for not having an investment account

Figure 30: Reasons for not having an investment account, by household income, December 2015

Fear of risk impacting decision to invest

Investment Account Balances

Balances in retirement and non-retirement accounts are the same

Figure 31: Amount in investment accounts, December 2015

Women lag men in retirement and non-retirement account savings

Figure 32: Total amount in non-retirement accounts, by gender, December 2015

Figure 33: Total amount in tax-advantaged retirement accounts, by gender, December 2015

Retirement contributions are steadier than non-retirement contributions

Figure 34: Contributions to investment accounts, by gender, December 2015

Hispanics are not saving

Figure 35: Investment account contributions, by Hispanic origin, December 2015

Engagement in Investing

Men are more interested and engaged in investing than are women

Figure 36: Engaged in investing, by gender, December 2015

Engagement increases with investment account balance

Figure 37: Engagement with investing, by non-retirement investment account balances, December 2015

Hispanics and non-Whites make their own investment decisions

Figure 38: Engaged in investing, by Hispanic origin and race, December 2015

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Changing Investment Goals

Asset growth or income?

Figure 39: Investment goals, by generation, December 2015

Investment goals differ with income

Figure 40: Investment goals, by household income, December 2015

How investors' goals have changed

Changing Investment Strategies

Men are more likely to change strategies

Figure 41: Changing investment strategies, by gender, December 2015

Millennials are active investors

Figure 42: Changing investment strategies, by generation, December 2015

Future Investment Plans

Women need to be encouraged

Figure 43: Future investment plans, by gender, December 2015

Millennials are optimistic and want to invest

Figure 44: Expectations of growth, by generations, December 2015

Figure 45: Future investment plans, by generation, December 2015

Hispanics are planning to be more active in investing

Figure 46: Future investment plans, by Hispanic origin and race, December 2015

Parents are more likely to be aggressively investing

Figure 47: Future investment plans, by parental status, December 2015

Investment Strategies

Income drives investment goals

Figure 48: Investment goals, by household income, December 2015

Men are being more cautious than women

Figure 49: How investment strategy has changed, by gender, December 2015

Attitudes toward Investing

Millennials want the benefits of investing – but are uncomfortable with it

Figure 50: Attitude toward investing by generation, December 2015

Hispanics are relying on investing for wealth

Figure 51: Attitude toward investing, by Hispanic origin, December 2015

Younger men, older women are interested in socially responsible investing

Figure 52: Importance of socially responsible investing, by gender, December 2015

Hispanics want to invest in causes

Figure 53: Importance of socially responsible investing, by Hispanic origin, December 2015

Cluster Analysis

Cluster Methodology

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Figure 54: Investor clusters, December 2015

Cluster 1: Disconnected Worriers

Demographics

Characteristics

Opportunity

Cluster 2: Young Optimists

Demographics

Characteristics

Opportunity

Cluster 3: Confident Independents

Demographics

Characteristics

Opportunity

Cluster Characteristic Tables

Figure 55: Investment account ownership, by target cluster, December 2015

Figure 56: Location of non-retirement investment account, by target clusters, December 2015

Figure 57: Location of tax-advantaged retirement account, by target clusters, December 2015

Figure 58: Total amount in non-retirement account(s), by target cluster, December 2015

Figure 59: Total amount in tax-advantaged retirement account(s), by target cluster, December 2015

Figure 60: Investment behaviors, by target cluster, December 2015

Figure 61: Future investment plans, by target cluster, December 2015

Figure 62: Attitudes toward investing, by target clusters, December 2015

Appendix – Data Sources and Abbreviations

Data sources

Sales data

Consumer survey data

Consumer qualitative research

Direct marketing creative

Abbreviations and terms

Abbreviations

Terms

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