

## Investment Products - Canada - January 2018

Report Price: £3254.83 | \$4395.00 | €3662.99

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“Socially responsible investing may be undergoing a rebirth as progressive segments of the population evince a greater interest in ethical screening of investments”

– **Sanjay Sharma, Senior Financial Services Analyst**

This report looks at the following areas:

- One in 20 Canadians has more than \$1 million in investments
- TD and RBC are the leading choices
- SRI more likely to appeal to 18-24s and LGBTQs
- Robo-advisors: current usage is low
- Women and older investors prefer low risk investments

High housing costs, volatile stock markets and inflation have impacted the lifestyles and savings of many Canadians. In addition to this, there are concerns about the housing market and the economic fallout that might result from an increase in interest rates due to the high levels of household debt that Canadians have. But Canada's government-funded pension plan and retirement income system remains strong. Additionally, a large number of Canadians own registered (tax-advantaged) as well as non-registered investment vehicles and the financial sector is in robust health.

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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

Definition  
Regional classifications  
Income  
Glossary

### Executive Summary

The issues  
One in 20 Canadians has more than \$1 million in investments  
Figure 1: Breakdown of investments, November 2017  
TD and RBC are the leading choices  
Figure 2: Financial institutions used for investments, November 2017  
SRI more likely to appeal to 18-24s and LGBTQs  
Figure 3: Attitudes towards investment products, November 2017  
Robo-advisors: current usage is low  
Figure 4: Attitudes related to investing, November 2017  
Women and older investors prefer low risk investments  
Figure 5: Attitudes towards investment products, November 2017  
The opportunities  
Adapting to a more cautious female investing style  
The repackaging of SRI in the age of artificial intelligence  
Men more open to using robo-advisors  
Figure 6: Willingness to use robo-advisors, by age and gender, November 2017  
What it means

### The Market – What You Need to Know

Net worth of Canadians continues to climb steadily  
Diminished capacity among seniors is a consequence of an aging population  
Usage of digital investment tools including robo-advisors is low  
The potential impact of cryptocurrencies  
Household debt and home prices biggest risk to Canadian economy

### Market Factors

Financial snapshot of Canadians  
Net worth of Canadians continues to climb steadily  
Net worth highest in British Columbia  
Asset increases driven by the value of homes  
Mortgages lead growth in overall debt  
Implications of the data

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Diminished capacity among seniors a consequence of aging population

Figure 7: Canadian population, by age, 2016

Usage of digital investment tools including robo-advisors is low

Figure 8: Awareness and usage of digital financial products and services, March 2017

The potential impact of cryptocurrencies

Household debt and home prices biggest risk to Canadian economy

Canada's growth expected to top the G7 this year

### Key Players – What You Need to Know

Desjardins, provincial credit unions, Cumis partnering to create Aviso Wealth

Regulators raise concerns about some wealth management firms

Great-West courts Millennials with program to tackle student debt and save for retirement

Wealthsimple teams up with global Fintech firm

Mackenzie goes to bat for women with new ETF

Canada's first Bitcoin fund launched

RBC and others join the robo-advisory bandwagon

### Industry Developments and Innovations

Desjardins, provincial credit unions, Cumis partnering to create Aviso Wealth

Fidelity Canada to open Toronto trading desk

Regulators raise concerns about some wealth management firms

Great-West courts Millennials with program to tackle student debt and save for retirement

National Bank Direct Brokerage eliminates commissions for US-listed ETFs

BMO to discontinue DSC on all new mutual fund purchases

Mackenzie goes to bat for women with new ETF

Canada's first artificial intelligence exchange-traded fund hits the market

Canada's first Bitcoin fund launched

Blockchain ETF to be launched

RBC and others join the robo-advisory bandwagon

Wealthsimple teams up with global Fintech firm

### Marketing Campaigns

Selected campaigns from Mintel Comperemedia

HSBC launches Jade, a luxury service for its "Premier" customers

Figure 9: HSBC Jade online advertisement screenshot, December 2017

RBC's automated 'MyAdvisor' introduced

Figure 10: RBC MyAdvisor, November 2017

Desjardins emphasizes the value of professional financial advice

Figure 11: Desjardins Wealth Management online advertisement, December 2017

### The Consumer – What You Need to Know

One in 20 Canadians has more than \$1 million in investments

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TD and RBC are the leading choices  
 Women and older investors prefer low risk investments  
 Robo-advisors: current usage is low, but some are willing to use  
 SRI more likely to appeal to 18-24s and LGBTQs  
 Around a quarter have estimated retirement amount needed

### Affluence and Ownership

One in 20 Canadians has more than \$1 million in investments  
 Figure 12: Breakdown of investments, November 2017

Around half of Canadians have a RRSP/RRIF and/TFSA  
 Figure 13: Product ownership, October 2017

Men are more likely to be millionaires  
 Figure 14: Breakdown of investments, men vs Women, November 2017

Men have a higher ownership of many investment products  
 Figure 15: Product ownership (select), men vs women, October 2017

Affluence strongly correlates with age  
 Figure 16: Breakdown of investments, by age, November 2017

Over-55s have a higher ownership of investments  
 Figure 17: Product ownership, by age, October 2017

### Competitive Snapshot

TD and RBC are the leading choices  
 Figure 18: Financial institutions used for investments, November 2017

TD, RBC appeal to a younger clientele, CUs and Independents to older consumers  
 Figure 19: Financial institutions used for investments, 18-44s vs over-45s, November 2017

Usage of independents increases among higher income earners  
 Figure 20: Usage of Independent investment company for investments, by annual income, November 2017

TD is the clear favourite among Asian Canadians  
 Figure 21: Financial institutions used for investments, Asian Canadians vs overall, November 2017

### Financial Planning

Around half of investors have spoken to a financial advisor  
 Figure 22: Investing activities performed, November 2017

Men, Asian Canadians, millionaires and younger investors are more likely to research investment strategies online  
 Figure 23: Investing activities performed, overall population vs millionaires, November 2017

Robo-advisors: current usage is low  
 Figure 24: Attitudes related to investing, November 2017

Men more open to using robo-advisors  
 Figure 25: Willingness to use robo-advisors, by age and gender, November 2017

Robo-advisors: immense potential but could pose challenges for full-service providers  
 Men and Asian Canadians more likely to find investing interesting

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## Investing Styles & Product Preferences

Women and older investors prefer low risk investments

Figure 26: Attitudes towards investment products, November 2017

Men more likely to invest based on 'tips'

Adapting to a more cautious female investing style

Chinese Canadians are more likely to agree that ETFs are most cost effective

Figure 27: Attitudes towards exchange traded funds (ETFs), November 2017

SRI more likely to appeal to 18-24s and LGBTQs

Figure 28: Attitudes towards investment products, November 2017

The repackaging of SRI in the age of artificial intelligence

Women are more likely to favour mutual fund investing for inexperienced investors

## Retirement and Estate Planning

Around a quarter have estimated retirement amount needed

Figure 29: Retirement and estate planning activities performed, November 2017

Around one in five over-55s has done estate planning

Millionaires are significantly more proactive in retirement and estate planning

Figure 30: Retirement and estate planning activities performed, overall population vs millionaires, November 2017

## The Experienced Investor

Experienced investors have a higher ownership of investment products...

Figure 31: Ownership of investments, experienced investors vs overall population, November 2017

... and are more diligent investors

Figure 32: Investing activities performed, experience investors vs overall population, November 2017

Experienced investors have a higher risk tolerance...

Figure 33: Attitudes related to investment products, experience investors vs overall population, November 2017

Advisors catering to experienced investors may require a larger tool-box of skills

Figure 34: Attitudes related to investing, experience investors vs overall population, November 2017

## Appendix – Data Sources and Abbreviations

Data sources

Consumer survey data

Abbreviations and terms

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