



S1. How long have you lived in Canada?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
I was born in Canada	86	84	-
I moved to Canada more than 3 years ago	14	16	-
I moved to Canada within the last 3 years	-	-	100
Sigma	100	100	100

Statistics:

1. To what extent do you agree or disagree with the following statements? - Top 2 Box Summary

	Total	65+
Base: All Respondents (unwtd)	2003	288
Base: All Respondents (wtd)	2064	371
I am securing my financial future	46	53
I can enjoy life because of the way I'm managing my money	43	58
I feel prepared and on track to meet my financial goals	40	56
I feel I have made good financial decisions so far	49	67
I have money left over at the end of the month	47	59
I review my financial accounts regularly	73	85
I am concerned that the money I have or will save won't last	54	37
I haven't tried hard enough to manage my finances	28	13
I feel like I will never pay off my credit	26	12
I don't mind carrying a balance on my credit cards, I'll pay it off eventually	21	15
My finances control my life	40	24
I know I can pay off my credit each month	55	74
When I think about my finances, I feel anxious	48	26
Because of my money situation, I feel like I will never have the things I want in life	40	24
I avoid thinking of my personal finances	20	8

New Canadians
301
248
58
53
54
55
50
76
44
33
10
33
40
67
42
28
25

1. To what extent do you agree or disagree with the following statements? -

Bottom 2 Box Summary

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
I am securing my financial future	22	12	10
I can enjoy life because of the way I'm managing my money	27	17	14
I feel prepared and on track to meet my financial goals	30	15	15
I feel I have made good financial decisions so far	22	11	13
I have money left over at the end of the month	31	18	19
I review my financial accounts regularly	9	5	4
I am concerned that the money I have or will save won't last	21	34	28
I haven't tried hard enough to manage my finances	48	69	42
I feel like I will never pay off my credit	55	75	69
I don't mind carrying a balance on my credit cards, I'll pay it off eventually	59	77	45
My finances control my life	30	46	29
I know I can pay off my credit each month	23	14	8
When I think about my finances, I feel anxious	27	44	23
Because of my money situation, I feel like I will never have the things I want in life	36	55	46
I avoid thinking of my personal finances	54	66	44

2. Over the past year, would you say that your financial situation has...?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Top 2 Box (Net)	28	22	45
Improved significantly	6	3	13
Improved somewhat	23	19	32
Remained stable	45	56	45
Bottom 2 Box (Net)	27	22	10
Worsened somewhat	21	20	9
Worsened significantly	6	2	*
Sigma	100	100	100

3. For the upcoming year, do you anticipate that your financial situation will...?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Top 2 Box (Net)	35	21	65
Improve significantly	7	2	19
Improve somewhat	27	19	46
Remain stable	46	60	30
Bottom 2 Box (Net)	19	19	5
Worsen somewhat	16	17	5
Worsen significantly	3	1	-
Sigma	100	100	100

4. Would you say that your financial outlook for the next 10 years is...?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Top 2 Box (Net)	48	44	79
Very positive	11	5	24
Positive	37	39	55
Neutral	34	42	17
Bottom 2 Box (Net)	18	14	4
Negative	13	11	4
Very negative	5	3	-
Sigma	100	100	100

5. How would you rate your level of confidence in your short-term financial situation (next 12-24 months)?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Top 2 Box (Net)	37	47	52
Very high	8	7	13
High	29	41	39
Neutral	43	38	40
Bottom 2 Box (Net)	20	14	8
Low	15	13	8
Very low	6	2	*
Sigma	100	100	100

6. How would you rate your level of confidence in your longer-term financial situation (e.g. when you will be retiring or how you will be managing your retirement years)?

	Total	65+	65+
Base: All Respondents (unwtd)	2003	288	313
Base: All Respondents (wtd)	2064	371	406
Top 2 Box (Net)	37	42	41
Very high	8	7	7
High	29	35	34
Neutral	38	43	43
Bottom 2 Box (Net)	26	15	16
Low	15	11	12
Very low	10	4	4
Sigma	100	100	100

7. What is your outlook for 2020 with the regards to the following? - Top 2 Box

Summary

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Stock markets	15	12	38
Global economy	16	8	40
Canadian economy	22	15	53
Level of control over your personal financial situation	31	18	65
Your financial literacy	30	18	58

7. What is your outlook for 2020 with the regards to the following? - Bottom 2

Box Summary

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Stock markets	35	40	19
Global economy	45	59	28
Canadian economy	33	40	12
Level of control over your personal financial situation	15	14	2
Your financial literacy	13	10	3

8. Do you have a budget to track your day-to-day expenses?

	Total	65+	New Canadians
		F	K
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Yes (Net)	63	65	72
Yes, and I always follow it	28	32	36
Yes, but I don't always follow it	35	34	36
No	37	35	28
Sigma	100	100	100

9. How would you rate your ability to manage your money?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Top 2 Box (Net)	57	71	64
Very good	23	35	18
Good	34	36	46
Average	33	26	30
Bottom 2 Box (Net)	10	3	6
Bad	8	3	5
Very Bad	2	1	*
Sigma	100	100	100

10. Have you used/consulted any financial professional(s) to help you with your investments or financial advice?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Yes (Net)	50	63	40
Yes - in the past year	26	40	23
Yes - but not in the past year	24	23	17
No - I don't invest	41	30	48
Not sure	5	4	7
Prefer not to respond	4	3	5
Sigma	100	100	100

11. How do you currently obtain financial planning advice?

	Total	65+	New Canadians
Base: All Answering (unwtd)	700	88	85
Base: All Answering (wtd)	684	110	71
I get advice from a family member	19	8	32
I get advice from a friend	10	5	19
I handle my own financial planning	64	75	67
I don't do any financial planning	16	19	6
Sigma	109	107	124

12. Which of the following categories best describes the total value of your household financial assets / investments, such as stocks, bonds, savings, GICs, mutual funds, ETFs, RRSPs and TFSAs? Exclude the value of any real estate or business holdings.

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Less than \$25,000	27	19	28
\$25,000 - \$49,999	10	9	18
\$50,000 - \$99,999	10	10	8
\$100,000 - \$249,999	13	18	9
\$250,000 - \$499,999	8	14	4
\$500,000 - \$749,999	3	6	2
\$750,000 - \$999,999	2	4	2
\$1,000,000 - \$2,999,999	2	2	3
\$3,000,000 or more	1	*	*
Not sure	8	5	10
Prefer not to respond	15	13	15
Sigma	100	100	100

13. In your opinion, what is needed to improve the financial confidence of Canadians?

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
Incorporate financial literacy education into core curriculum in schools	57	65	43
Increase/enhance resources available to Canadians	52	45	54
Workplace financial literacy training to employees	38	39	42
More research on the financial literacy of Canadians	25	19	27
Other	3	3	2
Nothing	*	-	-
Dk/ns	1	3	3
Sigma	176	174	172

Financial Index Score

	Total	65+	New Canadians
Base: All Respondents (unwtd)	2003	288	301
Base: All Respondents (wtd)	2064	371	248
0	2	-	-
4	2	1	*
8	1	*	-
9	*	-	-
12	*	*	*
13	2	-	-
16	*	*	-
17	2	2	*
19	*	-	-
20	*	-	-
21	2	*	-
22			-
24	*	*	-
25	2	1	1
26	*	-	*
28	*	-	*
29	2	1	*
30	1	-	1
32	*	-	-
33	2	2	1
34	2	1	*
36			-
37	2	1	2
38	3	3	2
39	*	-	-
41	1	*	1
42	4	1	2
43	*	-	1
45	1	1	2
46	4	1	3
47	1	*	1
49	1	1	*
50	6	4	4
51	2	2	3
53	*	-	-
54	3	3	7
55	2	1	4
56	*	-	*
57	*	1	-
58	3	4	5
59	4	5	4

60	*	-	*
61			*
62	2	2	4
63	4	3	3
64	*	-	-
66	2	1	3
67	5	5	8
68	1	-	1
70	*	*	1
71	4	6	7
72	1	*	1
74	*	1	*
75	6	10	7
76	1	-	1
78	*	*	-
79	4	7	5
80	1	*	1
83	4	8	3
84	1	*	*
85	*	-	-
87	1	4	3
88	1	2	2
91	*	1	*
92	3	5	4
96	2	3	2
100	3	5	1
Sigma	100	100	100
Summary			
0 - 50	42	22	21
51 - 70	28	27	42
71+	30	51	37
Mean	55,5	66.3	63.7
Std. Dev.	23,76	21,43	16,44
Std. Err.	0,52	1,11	1,04
Median	58	71	63