

Which of the following statements best describes how you are managing your investable assets during the COVID-19 pandemic?

	Total	Gender		AGE			EDUCATION				AGE GROUP			
		Male	Female	18-34	35-54	55+	<HS	HS	Post Sec	Univ Grad	Gen Z	Millennial	Gen X	Boomer
		A	B	C	D	E	F	G	H	I	J	K	L	M
Base: All Answering (unwtd)	863	417	446	224	342	297	37	139	335	352	94	220	264	285
Base: All Answering (wtd)	838	419	419	237	294	307	111	216	283	228	120	195	225	298
Use Advisor (Net)	354	171	183	78	116	160	33	77	131	113	40	67	90	156
	42%	41%	44%	33%	39%	52%	30%	36%	46%	49%	34%	35%	40%	52%
						CD	*		G	FG	*			JKL
I started using a financial advisor during the COVID-19 pandemic	52	26	26	32	18	3	8	10	18	15	22	16	11	3
	6%	6%	6%	13%	6%	1%	8%	5%	6%	7%	19%	8%	5%	1%
				DE	E		*				KLM*	M	M	
I have been using a financial advisor since before the COVID-19 pandemic began	302	145	157	47	98	158	25	67	114	97	18	51	79	154
	36%	35%	37%	20%	33%	51%	22%	31%	40%	43%	15%	26%	35%	52%
				C	CD		*		F	FG	*		J	JKL
I manage my investments myself (can include use of online tools, calculators, etc.)	429	226	203	145	167	117	61	116	141	111	72	120	125	111
	51%	54%	48%	61%	57%	38%	55%	54%	50%	49%	60%	62%	56%	37%
				E	E		*				M*	M	M	
Other	11	3	8	3	*	8	2	5	2	2	2	1	*	8
	1%	1%	2%	1%	*	3%	2%	2%	1%	1%	2%	*	*	3%
						D	*				*			L
None/ no investments	34	14	20	9	8	18	15	12	7	1	5	4	7	18
	4%	3%	5%	4%	3%	6%	13%	5%	2%	*	4%	2%	3%	6%
							HI*	I	I		*			
Don't know	9	4	5	1	4	4	-	6	2	1	-	2	2	4
	1%	1%	1%	*	1%	1%	-	3%	1%	1%	-	1%	1%	1%
							*				*			
Sigma	838	419	419	237	294	307	111	216	283	228	120	195	225	298
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Statistics:

Overlap formulae used

- Column Proportions:

Columns Tested (5%): A/B,C/D/E,F/G/H/I,J/K/L/M

Minimum Base: 30 (**), Small Base: 100 (*)

- Column Means:

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Thinking of your financial plans or goals, which of the following, if any, have changed due to the COVID-19 pandemic?

	Total	Gender		AGE			EDUCATION				AGE GROUP			
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		A	B	C	D	E	F	G	H	I	J	K	L	M
Base: All Answering (unwtd)	863	417	446	224	342	297	37	139	335	352	94	220	264	285
Base: All Answering (wtd)	838	419	419	237	294	307	111	216	283	228	120	195	225	298
Made Changes (Net)	346	194	152	131	120	95	36	88	118	105	65	104	84	92
	41%	46%	36%	55%	41%	31%	32%	41%	42%	46%	55%	53%	37%	31%
		B		DE	E		*				LM*	LM		
I have cashed in some/all of my RRSPs	59	32	27	15	24	21	7	15	23	15	8	18	13	20
	7%	8%	6%	6%	8%	7%	6%	7%	8%	6%	7%	9%	6%	7%
							*				*			
I have cashed in some/all of my stocks or bonds	49	37	12	20	18	10	3	6	23	16	8	20	10	10
	6%	9%	3%	9%	6%	3%	3%	3%	8%	7%	7%	10%	4%	3%
		B		E			*		G		*	LM		
I have made changes to the asset allocation of my investment/savings portfolio	89	49	40	29	34	26	3	20	28	38	11	26	27	24
	11%	12%	10%	12%	12%	8%	3%	9%	10%	17%	10%	14%	12%	8%
							*			FGH	*			
I have moved some of my investments into safer products	83	44	39	27	26	30	12	13	30	29	15	23	17	28
	10%	11%	9%	12%	9%	10%	10%	6%	10%	13%	12%	12%	8%	10%
							*			G	*			
I have used my savings	160	85	75	69	58	34	14	50	54	43	27	64	37	33
	19%	20%	18%	29%	20%	11%	13%	23%	19%	19%	22%	33%	16%	11%
				DE	E		*				M*	LM		
My expected retirement date has been pushed back	51	28	24	11	27	13	4	11	19	18	7	12	19	13
	6%	7%	6%	5%	9%	4%	3%	5%	7%	8%	6%	6%	9%	4%
				E			*				*			
My expected retirement date has moved up	33	24	9	12	12	9	3	6	14	10	11	7	6	9
	4%	6%	2%	5%	4%	3%	3%	3%	5%	4%	9%	4%	3%	3%
		B					*				L*			
Nothing - I haven't made any of these changes	492	225	267	105	174	212	75	128	165	124	54	91	141	206
	59%	54%	64%	45%	59%	69%	68%	59%	58%	54%	45%	47%	63%	69%
			A		C	CD	*				*		JK	JK
Sigma	1017	523	494	289	373	355	121	249	356	292	141	262	271	343
	121%	125%	118%	122%	127%	116%	109%	115%	126%	128%	118%	134%	120%	115%

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Do you feel more or less financially secure since the COVID-19 pandemic began?

		Gender		AGE			EDUCATION				AGE GROUP			
	Total	Male	Female	18-34	35-54	55+	<HS	HS	Post Sec	Univ Grad	Gen Z	Millennial	Gen X	Boomer
		A	B	C	D	E	F	G	H	I	J	K	L	M
Base: All Respondents (unwtd)	1001	479	522	263	388	350	49	179	398	375	109	253	306	333
Base: All Respondents (wtd)	1001	489	512	281	346	373	146	276	335	243	139	232	272	357
I feel more financially secure since the COVID-19 pandemic began	81	45	36	43	30	8	15	19	26	21	25	25	23	7
	8%	9%	7%	15%	9%	2%	10%	7%	8%	9%	18%	11%	9%	2%
				DE	E		*				LM*	M	M	
I feel less financial secure since the COVID-19 pandemic began	446	216	230	137	153	156	52	120	155	120	65	103	130	149
	45%	44%	45%	49%	44%	42%	36%	43%	46%	49%	46%	44%	48%	42%
							*				*			
No change in how financially secure I feel since the COVID-19 pandemic began	474	229	245	101	164	209	80	137	155	102	49	104	119	202
	47%	47%	48%	36%	47%	56%	54%	50%	46%	42%	35%	45%	44%	56%
				C	CD		*				*			JKL
Sigma	1001	489	512	281	346	373	146	276	335	243	139	232	272	357
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

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Has your mental health been impacted by COVID-19? (e.g. stress levels, anxiety)

		Gender		AGE			EDUCATION				AGE GROUP			
	Total	Male	Female	18-34	35-54	55+	<HS	HS	Post Sec	Univ Grad	Gen Z	Millennial	Gen X	Boomer
		A	B	C	D	E	F	G	H	I	J	K	L	M
Base: All Respondents (unwtd)	1001	479	522	263	388	350	49	179	398	375	109	253	306	333
Base: All Respondents (wtd)	1001	489	512	281	346	373	146	276	335	243	139	232	272	357
Yes (Net)	645	305	340	219	227	199	81	186	210	169	108	175	173	189
	64%	62%	67%	78%	66%	53%	55%	67%	63%	69%	78%	76%	64%	53%
				DE	E		*				LM*	LM	M	
Negatively (Subnet)	594	278	316	191	218	186	73	170	199	152	88	163	168	176
	59%	57%	62%	68%	63%	50%	50%	62%	59%	62%	63%	70%	62%	49%
				E	E		*				M*	M	M	
Yes - very negatively affected	141	66	75	64	49	28	31	41	44	25	29	51	34	27
	14%	14%	15%	23%	14%	8%	21%	15%	13%	10%	21%	22%	13%	8%
				DE	E		I*				M*	LM		
Yes - somewhat negatively affected	453	212	241	126	169	158	42	129	155	127	59	111	134	148
	45%	43%	47%	45%	49%	42%	29%	47%	46%	52%	42%	48%	49%	42%
							*	F	F	F	*			
Yes - positively affected	51	27	24	28	9	13	7	16	11	17	20	13	5	13
	5%	5%	5%	10%	3%	4%	5%	6%	3%	7%	15%	6%	2%	4%
				DE			*			H	KLM*	L		
No - not at all	356	184	171	62	119	174	65	90	125	74	31	57	99	168
	36%	38%	33%	22%	34%	47%	45%	33%	37%	31%	22%	24%	36%	47%
				C	CD		*				*		JK	JKL
Sigma	1001	489	512	281	346	373	146	276	335	243	139	232	272	357
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

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What is negatively impacting your mental health? Please

	Total	Gender		AGE			EDUCATION				AGE GROUP			
		Male	Female	18-34	35-54	55+	<HS	HS	Post Sec	Univ Grad	Gen Z	Millennial	Gen X	Boomer
	A	B	C	D	E	F	G	H	I	J	K	L	M	
Base: All Answering (unwtd)	600	270	330	178	246	176	24	110	235	231	67	174	195	164
Base: All Answering (wtd)	594	278	316	191	218	186	73	170	199	152	88	163	168	176
Fear of contracting COVID-19	329	138	190	106	103	119	47	98	110	74	50	84	82	113
	55%	50%	60%	56%	47%	64%	64%	57%	55%	49%	56%	52%	49%	64%
			A			D	**				*			KL
Physical health concerns	195	92	103	69	57	69	23	66	64	42	31	52	46	66
	33%	33%	32%	36%	26%	37%	31%	39%	32%	28%	35%	32%	27%	38%
						D	**				*			
Concern for loved ones	321	133	188	87	109	125	41	99	101	81	38	75	89	119
	54%	48%	59%	46%	50%	67%	56%	58%	50%	53%	43%	46%	53%	68%
			A			CD	**				*			JKL
Caring for children and family members	122	54	68	49	52	21	17	30	40	35	13	50	40	18
	21%	19%	22%	26%	24%	11%	23%	18%	20%	23%	15%	31%	24%	10%
				E	E		**				*	JM	M	
Financial concerns	259	116	143	84	101	74	22	78	97	62	31	76	82	70
	44%	42%	45%	44%	46%	40%	31%	46%	49%	41%	36%	47%	48%	40%
							**				*			
Increased workload	72	40	32	25	30	17	11	12	27	22	13	20	22	17
	12%	14%	10%	13%	14%	9%	16%	7%	13%	15%	15%	12%	13%	9%
							**			G	*			
Unemployment/reduced hours	159	64	95	66	68	25	15	48	52	44	30	55	52	22
	27%	23%	30%	35%	31%	13%	20%	28%	26%	29%	34%	34%	31%	13%
				E	E		**				M*	M	M	
Social isolation	333	143	190	114	119	100	38	89	114	92	50	99	92	93
	56%	51%	60%	60%	55%	54%	51%	53%	57%	61%	57%	61%	54%	53%
							**				*			
Unable to access the things I need/want	200	96	104	67	68	65	20	58	68	55	23	54	62	61
	34%	34%	33%	35%	31%	35%	27%	34%	34%	36%	27%	33%	37%	35%
							**				*			
Other	28	11	16	6	8	14	3	7	8	10	-	6	7	14
	5%	4%	5%	3%	4%	7%	5%	4%	4%	6%	-	4%	4%	8%
							**				*			J
Don't know	2	-	2	-	-	2	-	2	-	-	-	-	-	2
	*	-	1%	-	-	1%	-	1%	-	-	-	-	-	1%
							**				*			
Sigma	2018	887	1131	673	715	630	236	586	680	516	280	570	573	595
	339%	319%	358%	353%	328%	339%	322%	344%	342%	340%	318%	351%	341%	339%

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