

[24-070140-03 - Sun Life GRS Gender Differences]

Total sample

Are you currently contributing enough to receive the full employer match?

	Plan owners	Gender -Plan owners	
	Total Plan Owners	Male	Female
	B	C	D
Base: Those who know the exact percentatage and/or maximum dollar amount in any of their plans	1039	693	334
Yes	938	633	293
	90%	91%	88%
No	64	36	28
	6%	5%	8%
			C
Not sure	37	24	13
	4%	3%	4%
Sigma	1039	693	334
	100%	100%	100%

Total sample

[T2B - Summary] - Thinking about your ideal Employer-Sponsored Savings Plan, how important would each of the following features be to you?

	Plan owners	Gender -Plan owners	
	Total Plan Owners	Male	Female
	B	C	D
Base: Total Answering	1981	1229	726
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Smart Automation and "Set-It-and-Forget-It" Features (NET)	1561	946	597
	79%	77%	82%
			C

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Total sample

[Access to financial advisors for holistic retirement planning
(including tax and estate planning)] - Thinking about your ideal

	Plan owners
	Total Plan Owners
	B
Base: Total Answering	1981
Top 2 Box (Net)	1393
	70%
Very important (5)	602
	30%
Somewhat important (4)	791
	40%
Neither important nor unimportant (3)	362
	18%
Sigma	1981
	100%

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Total sample

[Regular check-ins with a financial advisor (e.g., every 6 months)] -

Thinking about your ideal Employer-Sponsored Savings Plan, how

	Total (Plan Owners + Non Plan Owners)
	A
Base: Total Answering	1981
Top 2 Box (Net)	1222
	62%
Very important (5)	455
	23%
Somewhat important (4)	767
	39%
Neither important nor unimportant (3)	417
	21%
Sigma	1981
	100%

Total sample

Which of the following do you currently use for financial advice and/or managing your investments with Sun Life?

	Plan owners
	Total Plan Owners
	B
Base: Total Answering	1981
Financial advisor (net)	930
	47%
Financial advisor at a bank	500
	25%
Independent financial advisor	538
	27%
Robo-advisor or digital investment management platform	124
	6%
None of these - I manage my finances entirely on my own	704
	36%
Sigma	2579
	130%

Total sample

Have you worked with a financial advisor on a plan for your retirement?

	Plan owners
	Total Plan Owners
	B
Base: Total Answering	1981
Yes	822
	41%
No	1159
	59%
Sigma	1981
	100%

Total sample AND
NO
Why haven't you consulted a financial advisor about your retirement planning?

	Plan owners	Gender - Plan owners		Gender X Age - Plan owners				Age - Plan owners								Province - Plan owners						Marital Status - Plan owners		Financial Advisors - Plan owners		Age - Plan owners		
	Total Plan Owners	Male	Female	25-44 Male	25-44 female	45+ Male	45+ female	25-44	45+	25-34	35-44	45-54	55-64	45-64	65-75	Alberta	BC	SK/MB	Quebec	Ontario	Atlantic	Single, never married/Divorced or widowed	Living with partner/Married	Yes	No	25-34	35-54	55+
	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	a	b	c
	1159	722	418	293	202	429	216	502	657	230	272	334	278	612	45	192	124	63	219	498	63	340	819	-	1159	230	606	323
Base: Those who have not worked with a financial advisor on a plan for their retirement																												
Self-Reliance and Sufficiency (Net)	605	411	187	174	86	237	101	263	342	117	146	161	157	318	24	81	61	34	122	275	32	162	443	-	605	117	307	181
	52%	57%	45%	59%	43%	55%	47%	52%	52%	51%	54%	48%	56%	52%	53%	42%	49%	54%	56%	55%	51%	48%	54%	-	52%	51%	51%	56%
	D		FH		FH			M				IMO	M	*				*	Q	Q	*	W						
Financial Barriers (Net)	383	227	152	88	67	139	85	156	227	71	85	104	108	212	15	70	44	21	51	173	24	118	265	-	383	71	189	123
	33%	31%	36%	30%	33%	32%	39%	31%	35%	31%	31%	31%	39%	35%	33%	36%	35%	33%	23%	35%	38%	35%	32%	-	33%	31%	31%	38%
						E							IMO	M	*	T	T	*		T	T*							b
Lack of Trust/Negative Perceptions (Net)	426	260	155	100	64	160	91	168	258	65	103	142	102	244	14	88	40	20	70	186	22	129	297	-	426	65	245	116
	37%	36%	37%	34%	32%	37%	42%	33%	39%	28%	38%	43%	37%	40%	31%	46%	32%	32%	32%	37%	35%	38%	36%	-	37%	28%	40%	36%
						F	K	IK			IK	IK	K	IK	*	RTU		*		*							a	
Procrastination/Timing Issues (Net)	567	346	210	136	120	210	90	261	306	132	129	156	131	287	19	100	61	32	111	233	30	163	404	-	567	132	285	150
	49%	48%	50%	46%	59%	49%	42%	52%	47%	57%	47%	47%	47%	47%	42%	52%	49%	51%	51%	47%	48%	48%	49%	-	49%	57%	47%	46%

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Total sample

How interested are you in attending financial education workshops or seminars about your workplace savings plan, if offered by your employer?

	Plan owners
	Total Plan Owners
	B
Base: Total Answering	1981
Top 2 Box (Net)	1233
	62%
Very interested (5)	484
	24%
Somewhat interested (4)	749
	38%
Neither interested nor uninterested (3)	300
	15%
Sigma	1981
	100%