

Low Awareness and Uptake to-date Amid Indications of Consumer Appetite for Socially Responsible Investment Products

1-in-10 own SRIs while 87% express interest in the category

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Montreal, QC – Newly released research conducted by Ipsos Reid on behalf of Standard Life reveals that a majority of Canadians are largely unaware of the Socially Responsible Investment (SRI) vehicle category, and that those who are aware and interested in them typically have to make proactive enquiries from Advisors, who themselves have only limited awareness and knowledge of the category.

Survey highlights include the following:

- Just 15% of Canadian investors feel they are knowledgeable to at least a moderate degree about SRIs. 85% know either the category only in name (43%) or have never heard of it at all (42%).
- 10% of Canadian investors currently hold SRI products in their portfolio, with those holding larger portfolios (\$100,000+) being more likely to do so than those with smaller portfolios.
- Inherent interest in SRIs stands at 32%, and another 55% of Canadians express interest in investing in the category provided they can obtain returns similar to those obtained

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- 1 -

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with non-SRI vehicles. SRIs offering a capital protection guarantee increase interest in the category amongst 9-in-10 (91%) Canadian investors.

- Satisfaction with SRI vehicles amongst investors holding them in their portfolios stands at 92% (15% very satisfied, 76% somewhat satisfied); equally, a majority of Canadian investors holding SRIs express satisfaction with their performance relative to non-SRI vehicles in their portfolios (16% more satisfied, 70% equally satisfied).
- Advisors generally do not talk to Canadian investors about SRIs unless investors proactively ask about them (29% saying the Advisor raised the topic in conversation). Despite not raising the topic of SRIs more spontaneously with investors, once the subject has been raised, in only 15% of instances does it result in a negative commentary from the advisor, and 61% of cases result in both a positive commentary and a recommendation to purchase.

These are some of the findings of an Ipsos Reid poll conducted between August 19th and September 9th, 2011, on behalf of Standard Life. For this survey, national samples of 537 Advisors from Rogers' online panel and 1,029 adults from Ipsos' Canadian online panel was interviewed online. Weighting was then employed on the latter to balance demographics and ensure that its' composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points 19 times out of 20 of what the results would have been had the entire population of adults in Canada been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.



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-30-

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- 3 -

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