

Q81new2014. Do you have, or work with, a financial advisor?

		Age								Region								Gender	
	Total	18-34	35-54	55+	<65	65+	50-59	60-69	70+	BC	Alberta	Man/ Sask	Manitoba	Saskatchewan	Ontario	Quebec	Atlantic	Male	Female
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Base: All Respondents	3205	723	1392	1090	2742	463	793	553	205	458	278	263	144	119	1229	712	265	1506	1699
Weighted	3205	859	1176	1170	2707	498	743	595	220	426	359	215	117	97	1244	744	218	1589	1616
Yes	1156	199	416	541	898	259	293	291	117	158	145	73	43	30	469	234	77	629	527
	36%	23%	35%	46%	33%	52%	40%	49%	53%	37%	40%	34%	37%	30%	38%	32%	36%	40%	33%
		AD	ABDF	A	ABCDF	ABD	ABDF	ABCDF		O				O				R	
No	2049	660	760	628	1809	239	450	304	103	269	214	142	74	68	775	509	141	960	1089
	64%	77%	65%	54%	67%	48%	61%	51%	47%	63%	60%	66%	63%	70%	62%	69%	65%	60%	67%
		BCDEFGH	CEFGH	EH	BCEFGH		CEGH									JN			Q

Proportions/Mean: Columns Tested (5% risk level) - A/B/C/D/E/F/G/H - I/J/K/L/M/N/O/P - Q/R Overlap formulae used.

Q81Anew2011. Do you have a financial plan (either formal or informal)?

		Age								Region								Gender	
	Total	18-34	35-54	55+	<65	65+	50-59	60-69	70+	BC	Alberta	Man/ Sask	Manitoba	Saskatchewan	Ontario	Quebec	Atlantic	Male	Female
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Base: All respondents	3205	723	1392	1090	2742	463	793	553	205	458	278	263	144	119	1229	712	265	1506	1699
Weighted	3205	859	1176	1170	2707	498	743	595	220	426	359	215	117	97	1244	744	218	1589	1616
Yes	1384	296	478	610	1104	280	340	321	126	191	188	87	55	32	540	287	92	731	653
	43%	34%	41%	52%	41%	56%	46%	54%	57%	45%	52%	40%	47%	33%	43%	39%	42%	46%	40%
			A	ABDF	A	ABCDF	ABD	ABDF	ABDF	MO	KMNOP	M	KM		MO			R	
No	1821	563	698	559	1603	218	404	273	94	235	171	128	62	66	704	457	126	858	963
	57%	66%	59%	48%	59%	44%	54%	46%	43%	55%	48%	60%	53%	67%	57%	62%	58%	54%	60%
		BCDEFGH	CEFGH	E	CEFGH		CEGH					JL		IJKLN	J	IJN	J		Q

Proportions/Mean: Columns Tested (5% risk level) - A/B/C/D/E/F/G/H - I/J/K/L/M/N/O/P - Q/R Overlap formulae used.

Q81A2new2011. In what format is your financial plan?

		Age								Region								Gender	
	Total	18-34	35-54	55+	<65	65+	50-59	60-69	70+	BC	Alberta	Man/ Sask	Manitoba	Saskatchewan	Ontario	Quebec	Atlantic	Male	Female
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Base: Have a financial plan	1384	256	564	564	1124	260	362	296	116	206	142	111	69	42	534	280	111	683	701
Weighted	1384	296	478	610	1104	280	340	321	126	191	188	87	55*	32*	540	287	92	731	653
On paper	534	64	180	290	403	131	151	155	62	78	70	26	15	11	197	128	34	283	252
	39%	22%	38%	48%	37%	47%	45%	48%	49%	41%	37%	31%	28%	35%	37%	45%	37%	39%	39%
In my head	458	123	160	175	369	89	93	94	38	57	61	35	25	10	195	75	35	227	231
	33%	42%	33%	29%	33%	32%	28%	29%	30%	30%	33%	40%	45%	32%	36%	26%	38%	31%	35%
		BCDEFGH	F		CF							O	IO		O		O		
Electronic	352	103	127	121	302	50	84	62	21	50	53	22	13	9	128	79	20	202	150
	25%	35%	27%	20%	27%	18%	25%	19%	17%	26%	28%	25%	24%	28%	24%	28%	22%	28%	23%
		BCDEFGH	CEGH		CEGH		CE												
Other	40	6	11	23	30	10	11	11	5	6	4	3	2	2	20	4	2	20	20
	3%	2%	2%	4%	3%	4%	3%	3%	4%	3%	2%	4%	3%	5%	4%	1%	2%	3%	3%

Proportions/Mean: Columns Tested (5% risk level) - A/B/C/D/E/F/G/H - I/J/K/L/M/N/O/P - Q/R Overlap formulae used. * small base

QB1a3new2014. How do you feel about your retirement planning, knowing that you have a financial plan?

		Age								Region								Gender	
	Total	18-34	35-54	55+	<65	65+	50-59	60-69	70+	BC	Alberta	Man/ Sask	Manitoba	Saskatchewan	Ontario	Quebec	Atlantic	Male	Female
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Base: Have a financial plan	1384	256	564	564	1124	260	362	296	116	206	142	111	69	42	534	280	111	683	701
Weighted	1384	296	478	610	1104	280	340	321	126	191	188	87	55*	32*	540	287	92	731	653
Great - it gives me confidence that my retirement plans are on track	387	51	115	221	273	115	86	116	60	58	55	22	14	8	146	87	20	228	160
	28%	17%	24%	36%	25%	41%	25%	36%	48%	30%	30%	25%	25%	26%	27%	30%	21%	31%	25%
			A	ABDF	A	ABCDF	A	ABDF	ABCDFFG									R	
Good - but the plan is only part of my retirement strategy	637	145	245	247	538	99	167	133	38	88	96	37	27	11	239	135	42	340	297
	46%	49%	51%	41%	49%	36%	49%	41%	30%	46%	51%	43%	49%	34%	44%	47%	46%	47%	46%
		CEH	CEGH	EH	CEGH		CEH	EH											
It really makes no difference	182	46	55	82	136	46	42	46	16	21	10	16	10	6	89	33	12	85	97
	13%	15%	11%	13%	12%	16%	12%	14%	13%	11%	6%	19%	18%	20%	17%	12%	13%	12%	15%
												J	J	J	J	J	J		
Not that great - I still feel there are pieces missing	177	54	63	60	157	21	45	26	12	24	26	11	5	7	66	32	19	79	99
	13%	18%	13%	10%	14%	7%	13%	8%	9%	13%	14%	13%	8%	21%	12%	11%	20%	11%	15%
		CEGH	EG		CEG		EG									LNO			Q
Summary																			
Top2Box (Great - it gives me confidence that my retirement plans are on track/ Good - but the plan is only part of my retirement strategy)	1024	196	360	468	810	214	253	249	98	146	152	59	40	19	385	221	62	567	457
	74%	66%	75%	77%	73%	76%	75%	78%	78%	76%	81%	68%	74%	60%	71%	77%	67%	78%	70%
			A	A	A	A	A	A	A	M	KMNP					M		R	
Low2Box (Good - but the plan is only part of my retirement strategy / Not that great - I still feel there are pieces missing)	359	99	118	142	293	66	87	72	28	45	36	27	15	13	155	65	30	164	196
	26%	34%	25%	23%	27%	24%	26%	23%	22%	24%	19%	32%	27%	41%	29%	23%	33%	22%	30%
		BCDEFGH										J		IJO	J		J		Q

Proportions/Mean: Columns Tested (5% risk level) - A/B/C/D/E/F/G/H - I/J/K/L/M/N/O/P - Q/R Overlap formulae used. * small base

QC1. RRSP?

Do you currently have any Registered Retirement Savings Plans or RRSPs?

		Age								Region								Gender	
	Total	18-34	35-54	55+	<65	65+	50-59	60-69	70+	BC	Alberta	Man/ Sask	Manitoba	Saskatchewan	Ontario	Quebec	Atlantic	Male	Female
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Base: All respondents	3205	723	1392	1090	2742	463	793	553	205	458	278	263	144	119	1229	712	265	1506	1699
Weighted	3205	859	1176	1170	2707	498	743	595	220	426	359	215	117	97	1244	744	218	1589	1616
Yes	1754	309	757	687	1518	236	504	387	60	249	220	116	71	45	682	387	99	916	837
	55%	36%	64%	59%	56%	47%	68%	65%	27%	58%	61%	54%	60%	46%	55%	52%	46%	58%	52%
		H	ACDEH	AEH	AEH	AH	ABCDEH	ACDEH		MOP	MOP	M	KMP		P			R	
Did have an RRSP; now have a RRIF	214	32	40	141	93	121	17	33	101	31	26	13	4	9	83	39	21	138	75
	7%	4%	3%	12%	3%	24%	2%	6%	46%	7%	7%	6%	3%	10%	7%	5%	10%	9%	5%
				ABDFG	F	ABCDFG		BDF	ABCDEFG			L		L			LO	R	
No	1112	444	352	316	984	128	210	161	55	136	99	76	40	35	431	284	86	489	623
	35%	52%	30%	27%	36%	26%	28%	27%	25%	32%	28%	35%	34%	36%	35%	38%	40%	31%	39%
		BCDEFGH			BCEFGH										J	IJ	IJ		Q
Don't know	126	74	27	25	113	14	13	14	4	11	14	10	2	7	47	33	11	46	80
	4%	9%	2%	2%	4%	3%	2%	2%	2%	3%	4%	5%	2%	8%	4%	4%	5%	3%	5%
		BCDEFGH			BCFG							L		IL					Q

Proportions/Mean: Columns Tested (5% risk level) - A/B/C/D/E/F/G/H - I/J/K/L/M/N/O/P - Q/R Overlap formulae used.