

**THE  
GLOBE  
AND  
MAIL** **INSIDERS**

**Finance Study**  
**October 2022**



# Introduction

## Objective and Methodology

The Globe reached out to our Insiders to learn more about their personal investing as well as their concerns about their investment portfolio in a possible recession.

We asked them about:

- Their investments and what institutions held them
- Where they acquire investing information
- If they planned to liquidate or invest more in a recession
- Whether they used a financial advisor
- If they didn't have a financial advisor, were they planning to hire one

### Survey Period:

October 14 – 27, 2022

### Survey Participants:

1,457 respondents (39% response rate)

Source: Globe Insiders panel, Globe Financial Survey, October 14 - 27, 2022



## Slide 2

---

**CA0** In your sources at the bottom of each slide, can you check your sample #  $n$ ? I'm looking at the data sheet and it appears that 1,428 is the correct sample for each question, so I'm not sure where your numbers are coming from?

Consky, Andrew, 2022-11-30T03:11:07.535

**AJ0 0** I may have been using the incomplete and or disqualified data in the report. Completes are 1428. Will check each bar graph and  $n$  based on completes only

Ainsworth, Jason, 2022-11-30T18:54:45.050



## Summary

### Globe readers are heavily invested – 98% have some form of investment

- Nearly 75% of readers own stocks
- At least half of readers hold savings accounts, RRSPs and mutual funds
- At least one third of readers hold pension funds, ETFs, fixed-income securities, or bonds
- One third also report holding crypto currency, real estate or a commodity as an investment

### Newspapers are #1 for financial information and investing advice

- The next top resources consulted are financial experts, business and financial magazines (online and print), financial websites, online searches and investment companies
- Roughly two-thirds of readers utilize a financial advisor and the other one-third do not
- 5% of readers are looking for a financial advisor

CA0

### Globe readers are concerned about a possible recession but will CA1intain their investments and/or add to their portfolios

- 67% say they are somewhat or moderately concerned about how a recession will impact their investments
- About 6 out of 10 will maintain their portfolio (not liquidate any part of it)
- 58% say they will likely invest further despite a recession
- Of those planning to invest, stocks were cited most often followed by ETFs, savings and mutual funds

### Slide 3

---

- CA0** I would change the word "new" to "financial" as some people are looking for one because the don't have one, and others have one and are looking for a new one.  
Consky, Andrew, 2022-11-30T03:24:26.015
- CA1** I would remove the word "All" - there's a small percentage not concerned...but really just saying "Globe readers are..." works here  
Consky, Andrew, 2022-11-30T03:25:55.663
- CA2** Looks great!  
Consky, Andrew, 2022-11-30T03:29:42.091