

### DATA VINTAGE

2020

### SURVEY EDITION

2018

### SURVEY SAMPLE SIZE

19,000+

### BASE LEVEL GEOGRAPHY

Postal code

### VARIABLES

1,919

To view the complete list of variables please visit:

[environicsanalytics.com/en-ca/variables](https://environicsanalytics.com/en-ca/variables)

## WHAT IT IS

MoneyMatters Powered by Canadian Financial Monitor (CFM) is a major source of household financial characteristics in Canada. It's based on a large national sample survey of more than 19,000 respondents and developed with input from some of the nation's largest financial institutions. The MoneyMatters database provides competitive insights, channel preferences and financial behaviour measured by the survey at the six-digit, postal code level (FSALDU). With national coverage of 1,919 variables, the MoneyMatters database is a vital source of consumer information on personal banking, investments, credit and insurance. MoneyMatters data also can be linked to PRIZM, providing segment-based analysis for answering diverse financial questions—an invaluable resource for C-suite executives and frontline managers for customer profiling, strategic planning, trade area analysis and target marketing. MoneyMatters helps financial companies, such as banks, insurance companies and brokerage firms, to promote their services, evaluate potential branch locations and cross-sell products to their key customer segments.

## HOW IT'S USED



Insurance companies can use the MoneyMatters to analyze their trade areas to identify the various financial institutions from which households are buying life, health and auto insurance. The database helps them gain a better understanding of the competitive landscape in the areas they do business.



Banks can determine which of their customers are more likely to carry another bank's credit card. This information can help marketers target product promotions and identify cross-selling opportunities to key customers.



Linking MoneyMatters data to the PRIZM segments of a credit union's customer base provides a more effective customer acquisition strategy by enabling users to profile their best customers and locate look-alike prospects in new or underserved markets.

## SAMPLE QUESTIONS IT CAN ANSWER

- What is the preferred banking channel for my customers? How does it differ from the channel used by customers at competing banks?
- How do the investment profiles of my customers differ between my trade areas?
- Which banking institutions do my target groups tend to favour?
- Do households in my trade area tend to have shorter- or longer-term mortgages? Are those fixed rate or variable loan products?
- How do my customers like to acquire insurance: Through an independent broker or directly from the carrier?