

WEALTHTRENDS RELEASE NOTES

DATA VINTAGE

2020

BASE LEVEL GEOGRAPHY

Dissemination Area

VARIABLES

103*

*Released in 3 quarterly successions of 33 variables

REQUIREMENTS

WealthScapes License

WHAT IT IS

WealthTrends is part of our COVID recovery suite of products providing a more recent economic and financial status update for Canadian dissemination areas. WealthTrends is an essential add-on to licensed WealthScapes users. Following a WealthScapes annual update, which is built using the values up to the end the previous year, three quarterly successions of WealthTrends data releases (see release schedule below) provide updates to key WealthScapes and Employment Rate variables.

DATA PRODUCT	DATA VALUES AS OF	APPROX.RELEASE
WealthScapes 2020	December 31 st , 2019	July 2020
WealthTrends 2020 Q1	March 31 st , 2020	December 2020
WealthTrends 2020 Q2	June 30 th , 2020	December 2020
WealthTrends 2020 Q3	September 30 th , 2020	Spring 2021
WealthScapes 2021	December 31 st , 2020	July 2021

Quarterly estimates are modelled using key inputs and control totals from Equifax, Teranet, Canadian Financial Monitor, Bank of Canada, Labour Force Survey, National Economic Accounts, and DemoStats. Using this more recent information, WealthTrends reflects the economic well-being of Canadians throughout-the-year and better captures the impact from economic factors and events. WealthTrends can be used by financial institutions, retailers, and governments to adjust strategies to reflect recent economic conditions.

HOW IT'S USED



Financial institutions can map the change in average real estate values quarter over quarter, and track the trend in mortgage values for trade areas in which they service.



Governments can design or measure the success of relief programs by monitoring the trend of labour force activity in relation to total consumer debt. This can ensure the right households are getting the help they need.



Investment advisers can analyze quarter over quarter spikes in savings and investments to tailor their products or messaging to retain or grow their client base.

SAMPLE QUESTIONS IT CAN ANSWER

- How should advisors develop financial plans and programs?
- How are we trending compared to the market?
- Which of our trade areas are trending better than the others?
- Are our segments trending in the right direction?