ENVIRONICS ANALYTICS

WEALTHTRENDS RELEASE NOTES

PRODUCT VINTAGE
2022

BASE LEVEL GEOGRAPHY
Dissemination Area

VARIABLES
109*

*Released in 3 quarterly successions of 35 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 2022	December 31st, 2021	Q3 2022
WealthTrends 2022 Q1	March 31st, 2022	Q3 2022
WealthTrends 2022 Q2	June 30th, 2022	Q4 2022
WealthTrends 2022 Q3	September 30th, 2022	Q1 2023
WealthScapes 2023	December 31st, 2022	Q2 2023

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.

WHAT'S NEW

The WealthTrends 2022 release includes a new *Financial Assets- Balance* variable for each quarter.

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.

Goverments 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?