

FOR MORE INFORMATION, PLEASE CONTACT NICOLE PALMER AT NICOLE.PALMER@PHOENIXMI.COM

TD Bank's *Bank Human* Campaign Garnered Consumers' Attention in Phoenix's Latest Retail Banking Study

The RB study provides an ongoing, continuous study among retail banking consumers to provide major retail banking providers with benchmarking, tracking, and analysis of customer behaviors and attitudes to support advertising and brand optimization.



"Late Arrival"

"Late Arrival" was the first ranked ad in September thanks to exceptional recall, as 48% of consumers reported previously seeing the spot. It also ranked third creatively and was significantly above the norm for Persuasion.



"Like Magic"

"Like Magic" was on par with the average with a score of 126 (vs 123). 51% of consumers had previously seen the ad, and respondents found it to have significant Breakthrough.



"Maintenance Guy"

"Maintenance Guy" also saw significant recall and managed to break through the creative clutter, though it was on par for Creative AdPi. The ad was directionally above average for In-Market Performance.



"Living Room Band"

"Living Room Band" also saw significant recall, putting it on par for In-Market Performance. It was found to have notable Breakthrough, though it was average creatively.

Source: October Retail Banking Study

[By Daniel Rivera](#)

SPOTLIGHT

[Click Here To Learn More About Our Syndicated Studies](#)

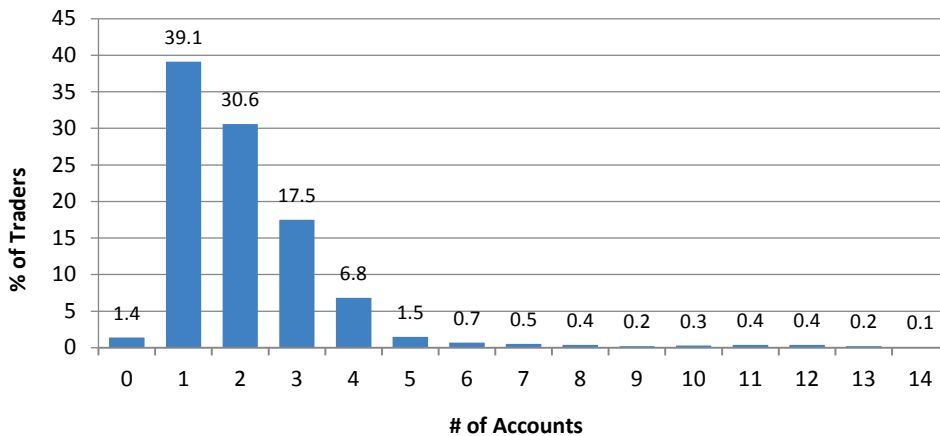
- Global Wealth Monitor
- Active Traders
- Financial Advisors
- Diversified Insurance and Investment Providers (DIIP)
- Retail Banking
- Investment Services

Charles Schwab's "Why: 30" Was The Best Performing Ad in Our Latest IS Study



Active Traders Have Multiple Trading Accounts

Many active traders continue to have more than one trading account; most cross accounts with Charles Schwab, Fidelity, E*Trade, TD Ameritrade, ING Direct, Scottrade, and Merrill Edge.



Source: 3Q14 Active Trader Study

[By Marc Grozalsky](#)

Up from second place last month, Charles Schwab's "Why: 30" ranked first among TV ads in our October Investment Services study. The ad was able to connect on 26 of 27 consumer connection metrics, and it was in the first place spot for Creative AdPi. Almost half (47%) of respondents had previously seen the ad, and it was able to lift investors' Brand Impression and Purchase Consideration.

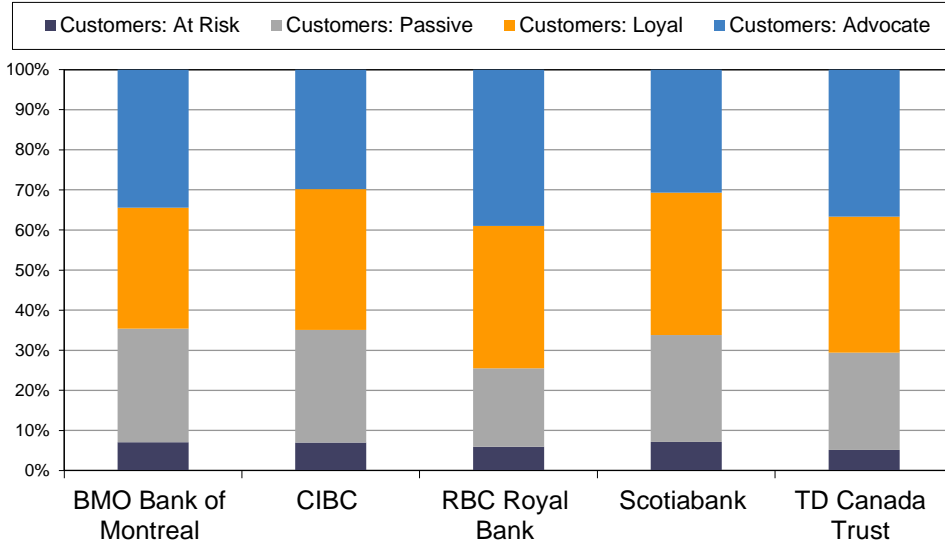
Source: October Investment Services Study

[By Cait Robbins](#)



FOR MORE INFORMATION, PLEASE CONTACT NICOLE PALMER AT NICOLE.PALMER@PHOENIXMI.COM

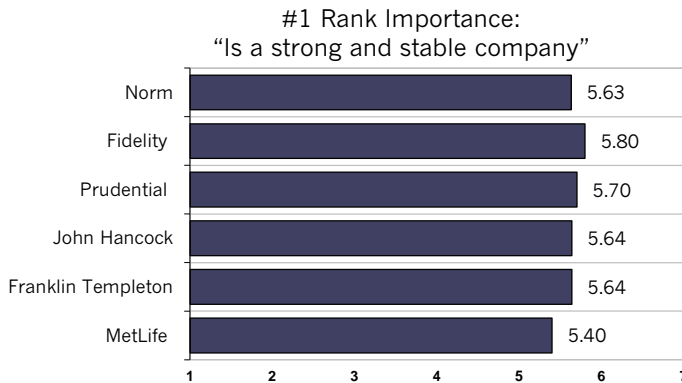
RBC Royal Bank Topped The Big Five With Highest Share of Advocate Customers



BrandPi® is based on a fixed segmentation of brand customers and prospects. "Advocate" customers are classified as current accountholders who gave the company a consideration rating of 6 or higher and recommended the company on a 1st unaided basis.

Source: 3Q14 Canadian Retail Banking Study [By Daniel Rivera](#)

What Matters Most to Financial Advisors?



In line with results from previous quarters, financial advisors revealed that they are most concerned with a company that is strong and stable, is a company [their] clients can trust, and is a company that conducts business with the highest ethical standards. They are least concerned that a company is socially responsible, offers a wide range of products, and acts as an essential partner to running [their] business.

Source: 2Q14 Financial Advisor Study; *3Q14 Currently In Field [By Carl Uttaro](#)

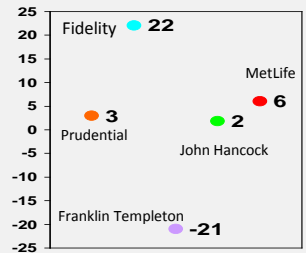
SPOTLIGHT

[Click Here To Learn More About Our Syndicated Studies](#)

- Global Wealth Monitor
- Active Traders
- Financial Advisors
- Diversified Insurance and Investment Providers (DIIP)
- Retail Banking
- Investment Services

Fidelity Customers Most Likely to Recommend

Net Promoter Score is the % of Promoters (9 to 10) - % of Detractors (0 to 6)



Our 2nd Quarter DIIP Study exposed that Fidelity customers are most likely to recommend the firm to a friend or colleague; the brand's customer base boasted a net promoter score of 22. MetLife, Prudential, and John Hancock saw similar scores at 6, 3, and 2, respectively, while Franklin Templeton's high percent of detractors led to a score of -21.

Source: 2Q14 DIIP Study; *3Q14 Currently In Field

[By Cait Robbins](#)