2015 Annual Brand Tracking Report: Executive Summary

Now in its fifth year, the Public Awareness Campaign seeks to raise awareness of CFP® certification among its target audience, the Mass Affluent Initiator (MAI), as well as increase preference for and intent to use a CFP® professional. Each year Ipsos conducts a brand tracking study to measure the campaign’s progress.

**Highlights**

- Among its target audience, unaided awareness of CFP® certification rose 4 percentage points from 30 in 2014 to 34 percent this year, which is double the 17 percent first measured in 2011 when the campaign began.

- Total brand awareness, which measures the target audience’s general knowledge of the certification and reflects the integration of the campaign among various communication platforms (advertising, earned media, social media) leapt 6 percentage points from 79 to 85 percent from 2014 to 2015, which is a 10 percent point increase since 2011.

- Those who have a preference for CFP® certification has increased by 30 percentage points since 2011 (up 5 percentage points from 2014 to 2015) and those saying they intend to use a financial professional with the CFP® certification has increased by 22 percentage points since 2011 (up 6 points since 2014).

- More than 69 percent of the target audience said they would insist their financial planner hold the CFP® certification.

- Nearly half (48%) strongly agree that people should insist on CFP® designation (vs. 30% who say the same of a CPA).

- By comparison, only 49 percent would insist upon their financial planner having a Certified Public Accountant (CPA) designation; 34 percent for CFA and 31 percent for CPA-PFS.
Preference for CFP® certification has increased steadily over the years

- While increased awareness remains the focus of the campaign, as a byproduct, there have been increases in preference for and intent to use a CFP® professional.
- Preference for CFP® certification among MAIs more than doubled since 2011 (52% in 2015 vs. 22% in 2011); this key metric has increased by 30 percentage points since the campaign began 5 years ago.
- In the past year alone, preference increased by five percentage points (52% in 2015 vs. 47% in 2014).

Intent to use a financial professional with CFP® certification has also experienced significant gains

- Since 2011, CFP® scores for intent to use increased from 30% in 2011 to 52% in 2015. This represents an increase of 22 percentage points over the past five years.
- In the past year, intent to use a CFP® professional rose by six percentage points (52% in 2015 vs. 46% in 2014).

Trustworthiness of CFP® certification continues to rise

- Over the past five years, CFP® certification has increasingly been considered trustworthy among MAIs. Since 2011, this score increased by 26 percentage points (49% in 2015 vs. 23% in 2011).

CFP® brand increasingly performs well on key attributes like familiarity and quality

- Since 2011, the CFP® brand has experienced significant growth on key positive attributes among MAIs.
  - For example, its score grew by 24 percentage points on willingness to recommend to a friend and 19 percentage points on quality.
- In 2015, most indicated familiarity with CFP® certification (55%), which increased by eight percentage points in one year alone.

<table>
<thead>
<tr>
<th>Perception of CFP® Attributes Among MAIs</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Familiarity</td>
<td>43%</td>
<td>41%</td>
<td>44%</td>
<td>47%</td>
<td>55%</td>
</tr>
<tr>
<td>Uniqueness</td>
<td>25%</td>
<td>30%</td>
<td>35%</td>
<td>37%</td>
<td>43%</td>
</tr>
<tr>
<td>Recommend to Friend</td>
<td>25%</td>
<td>30%</td>
<td>39%</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Quality</td>
<td>25%</td>
<td>27%</td>
<td>33%</td>
<td>44%</td>
<td>44%</td>
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</tbody>
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