



Bloomberg Media B2B Insights Series: Financial Advisor Study Preview

With tariffs and tech shaking market foundations, advisors are doubling down on timely insights to guide their decisions and their clients

Advisors anticipate significant impacts on their businesses from inflation, economic uncertainty, and the ripple effects of global trade shifts including mounting tariff pressures. In response, they're becoming more vigilant and information-driven, checking financial news more frequently and with sharper intent.

Most advisors check news multiple times a day especially around market open and close. They're turning real-time headlines into actionable insight. And when it comes to where they are most receptive, they rely only on the most trusted, credible environments.

82%

Financial News is important when making investment decisions

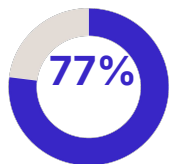
Q13: How important is financial news media for each of the following aspects of your professional role?



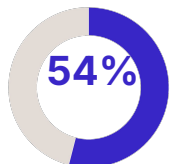
Advisors are thinking long term—not just about their clients' futures, but about their own evolving roles and career paths

Top Goals Over Next 5 Years

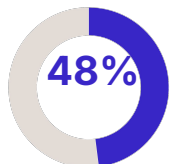
Base: Total = 550



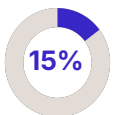
Grow assets under management



Expand client list



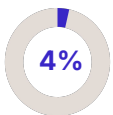
Maintain current book of business



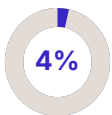
Retire



*Use skill set in a different area of financial services



Move to another firm



Leave industry

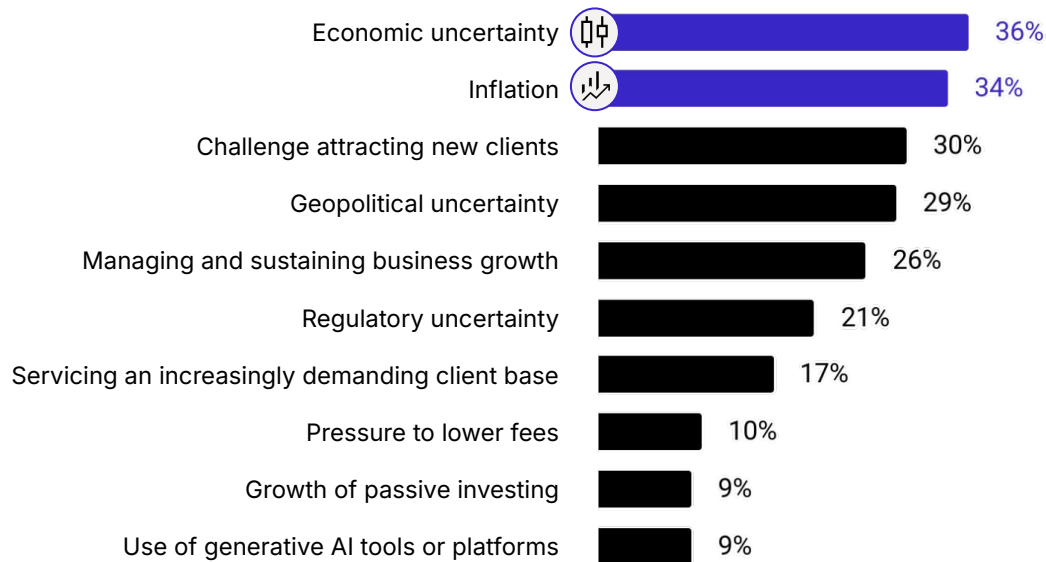


*14% of Millennial advisors plan to use their skill set in a different area of financial services

Advisors see economic turbulence and rising client expectations not as background noise but as the forces reshaping the future of their work

Top 10 Critical Issues Facing Advisors' Businesses in 2025

Base: Total = 550



Growth of passive investing is a greater issue for FAs in Canada - 20%

Economic uncertainty is seen as a greater issue for older generations than younger - Millennial FAs 28.8% vs Boomers 41.8%

FAs with \$200M+ AUM are more likely to cite servicing an increasingly demanding client base (24.3%) as an issue versus those with under \$200M AUM (15.1%)

Advisors see the next five years as a tipping point, with technology and AI poised to be the most powerful forces reshaping how they work

Biggest Areas of Impact on Advisor Industry in Next 5 Years

Base: Total = 550



49%

Technology / AI disruptions



37%

Regulatory changes



32%

Market volatility



29%

Changing client demographics



27%

Cybersecurity



27%

Geopolitical events



24%

Changing client expectations



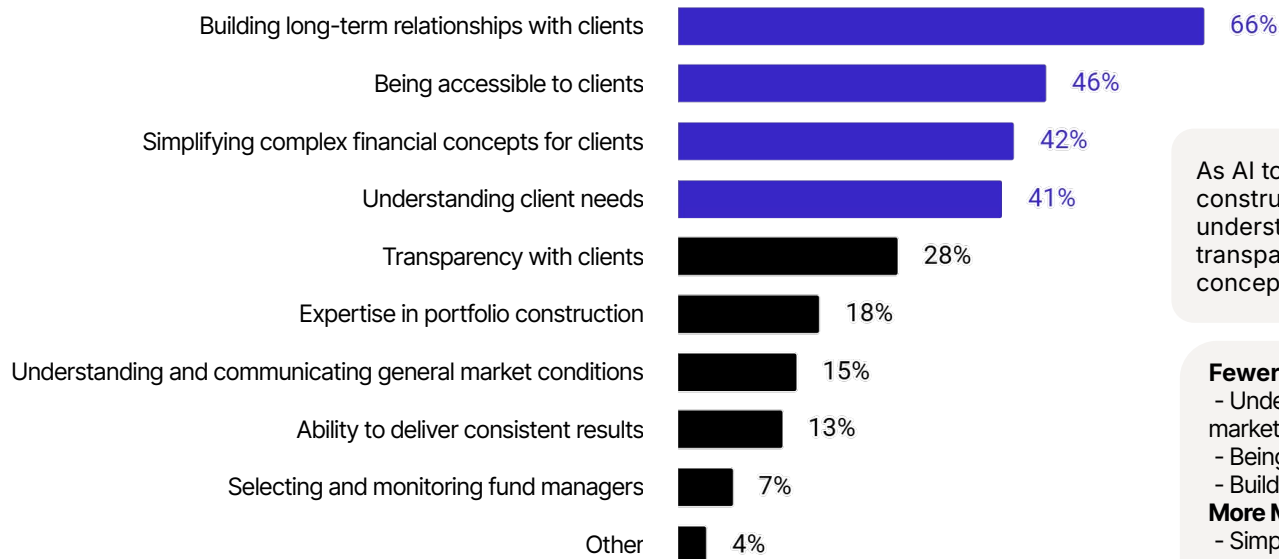
24%

Increasing client capabilities

When algorithms can't explain market swings after a trade headline, advisors step in to offer clarity and confidence

How Advisors Differentiate Themselves

Base: Total = 550



As AI tools become more adept at portfolio construction and data analysis, the ability to understand client needs, maintain transparency, and simplify complex financial concepts has become more vital.

Fewer Millennial advisors cite:

- Understanding and communicating general market conditions
- Being accessible to clients
- Building long term relationships with clients

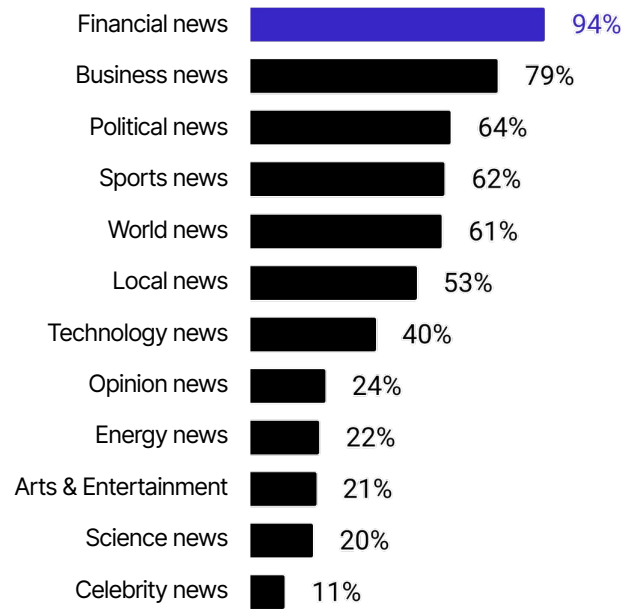
More Millennial advisors cite:

- Simplifying complex financial concepts for clients
- Transparency
- Expertise in portfolio construction

To stay ahead of market shifts and client needs, advisors rely on timely financial news from stock analysis to global signals

Types of News Regularly Consumed

Base: Total = 550



Top 10 Types of Financial News Regularly Consumed

Base: Total = 550

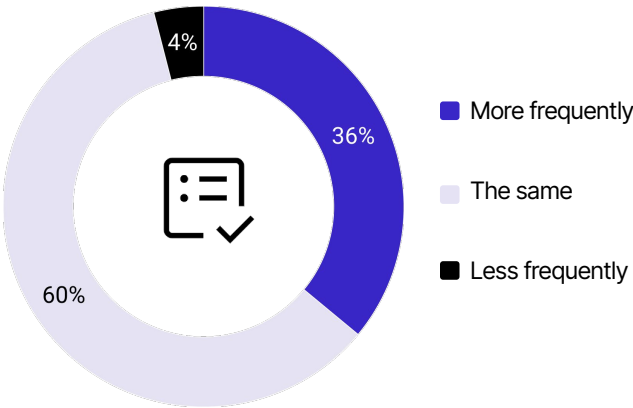


Q.1: What type of news do you regularly read, watch, or listen to? Please consider "regularly" as weekly or more often.
Q.2: What type of financial news do you regularly read, watch, or listen to? Please consider "regularly" as weekly or more often.

Amid rising anxiety, advisors now check financial news more often, often multiple times a day to stay on top of market movements

Frequency of Checking Financial News Compared to 3 Years Ago

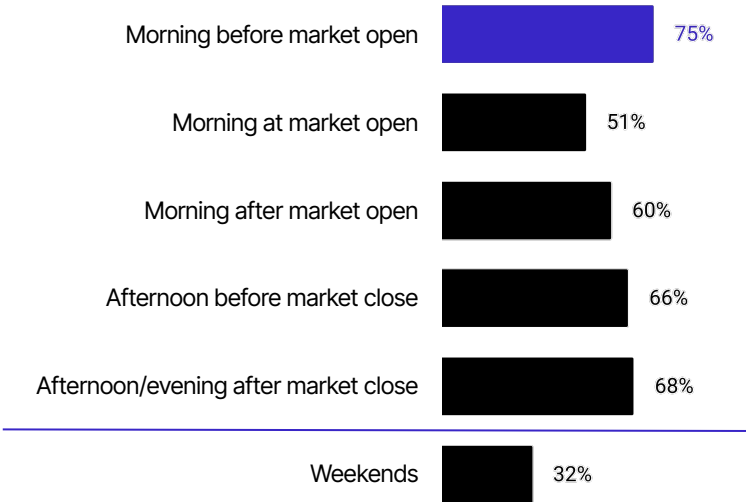
Base: Total = 550



Those checking more frequently are more likely to have \$200M+ AUM, under 10 years experience, Millennials, and Bloomberg users.

Preferred Time to Check Financial News

Base: Total = 550



Those checking news on weekends are more likely to have \$200M+ AUM, use Bloomberg, and have under 100 clients.

Q.7: When do you check financial news?
Q.8: Compared to 3 years ago, are you checking financial news...

Get in touch for the full report, with data on specific channel and platform behavior, investment habits, and more.



Extensive content areas

Generations	FA Motivations	Media Receptivity
Market Segmentation	Behaviors	Formats
Crypto	ESG	Events



Bloomberg Media B2B Insights Series: Financial Advisor Study Preview

Michelle Lynn, Global Head of Data Science & Insights,
Bloomberg Media, mlynn11@bloomberg.net