

U.S. and Canadian Financial Services Study Release Dates—2017



Study	Description	Release*
Banking		
U.S. and Canadian Retail Banking Satisfaction Studies	Analyze retail banking customers' satisfaction with their primary financial institution and the impact it has on bottom-line metrics, such as retention, loyalty, and advocacy. The studies provide critical benchmarking information and identify the dominant factors that drive retail banking customer satisfaction. In addition to measuring customers' perceptions of their bank's ability to meet their expectations, the studies also provide a series of measurable and actionable Key Performance Indicators for satisfying customers.	U.S. Wave 1 Publish: July 20, 2016 U.S. Wave 2 Publish: October 19, 2016 U.S. Wave 3 Publish: January 18, 2017 U.S. Wave 4 Publish: April 25, 2017 U.S. Wave 4 Press Release: April 27, 2017 Canadian Publish: July 11, 2017 Canadian Press Release: July 13, 2017
U.S. Credit Card Satisfaction Study	Examines the leading credit card issuers as determined by their total active accounts in order to help them understand the level of satisfaction customers have with both their primary and secondary credit card companies. The study not only analyzes customers' perceptions of their issuer's ability to meet their expectations, but also identifies critical metrics that represent best practice performance targets for satisfying customers.	Wave 1 Publish: November 15, 2016 Wave 2 Publish: February 15, 2017 Wave 3 Publish: May 9, 2017 Wave 4 Publish: August 15, 2017 Wave 4 Press Release: August 17, 2017
U.S. Small Business Banking Satisfaction Study	Explores small business owners' satisfaction with the largest financial institutions in the United States. The study also analyzes small business owners' perceptions of their bank's ability to meet their expectations and highlights which banks perform well in managing relationships with these customers and why.	Publish: October 24, 2017 Press Release: October 26, 2017
Investment Services		
U.S. Financial Advisor Satisfaction Study	Helps wealth management firms understand how effectively they are servicing their affiliated financial advisors, whether they are independent or employees of the broker-dealer. The study identifies firms' strengths and weaknesses relative to key competitors, as well as opportunities for immediate and long-term improvement. Insights are provided for how investment firms may improve advisor satisfaction, as well as loyalty and retention.	Publish: June 27, 2017 Press Release: June 29, 2017
U.S. and Canadian Full Service Investor Satisfaction Studies	Evaluate the needs, expectations, and desires of today's investors and provide a broad understanding of how full service investment firms may not only improve investor satisfaction, but also improve investor loyalty, retention, and advocacy. Additionally, the information helps investment firms understand the dynamics—such as portfolio size and trading activity—that drive satisfaction among different types of investors.	U.S. Publish: April 4, 2017 U.S. Press Release: April 6, 2017 Canadian Publish: August 15, 2017 Canadian Press Release: August 17, 2017
U.S. and Canadian Self-Directed Investor Satisfaction Studies	Examine investor satisfaction with self-directed investment platforms. The studies also provide insights into the needs, expectations, and desires of today's self-directed investors and identify best practices for improving overall satisfaction and loyalty, retention, and advocacy. Additionally, the studies help investment firms understand the dynamics—such as portfolio size and trading activity—that drive satisfaction among different types of investors.	U.S. Publish: May 16, 2017 U.S. Press Release: May 18, 2017 Canadian Publish: September 12, 2017 Canadian Press Release: September 14, 2017

Custom pricing available for multiple study and multiple year subscriptions.

*Publish and press release dates subject to change

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Mortgage		
U.S. Primary Mortgage Servicer Satisfaction Study	Analyzes customer satisfaction with the servicing experience for the largest U.S. mortgage servicers. The study provides a better understanding of the needs, expectations, and desires of today's mortgage customers, as well as insights into how firms may not only improve customer satisfaction, but also commitment and advocacy.	Publish: July 25, 2017 Press Release: July 27, 2017
U.S. Primary Mortgage Origination Satisfaction Study	Examines customer satisfaction with the origination experience among the largest mortgage lenders in the United States. Study information helps lenders understand the drivers of customer satisfaction and focuses on the dominant factors that impact satisfaction and behavior among customers who originated their loan during the past 12 months.	Publish: November 7, 2017 Press Release: November 9, 2017
Automotive Finance		
U.S. and Canadian Dealer Financing Satisfaction Studies	Explore dealer satisfaction with auto financing providers for both wholesale and retail products. The studies examine the relationship between satisfaction among dealer principals with their finance companies and the impact this has on continued usage. In addition, the studies include in-depth dealer evaluations of the providers they use for prime retail credit, sub-prime retail credit, retail leasing, and floor planning.	U.S. Publish: August 10, 2017 U.S. Press Release: August 14, 2017 Canadian Publish: May 18, 2017 Canadian Press Release: May 22, 2017
U.S. Consumer Financing Satisfaction Study	Analyzes consumers' satisfaction with their auto finance provider. The study also includes information that helps providers understand the level of satisfaction consumers have with their entire financing experience, from the initial in-dealership experience, to servicing of the contract, to end-of-term financing issues. In addition, the study identifies critical metrics that represent best practice performance targets for satisfying consumers.	Publish: November 9, 2017 Press Release: November 13, 2017

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