



U.S. and Canadian Financial Services Study Release Dates—2018

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 18, 2017 U.S. Wave 2 Publish: October 17, 2017 U.S. Wave 3 Publish: January 16, 2018 U.S. Wave 4 Publish: April 24, 2018 U.S. Wave 4 Press Release: April 26, 2018 Canadian W1 Publish: October 24, 2017 Canadian W2 Publish: May 1, 2018 Canadian Press Release: May 3, 2018
U.S. and Canadian 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. In 2018, the Credit Card Satisfaction Study will expand to examine leading issuers in the Canadian market.	Wave 1 Publish: November 14, 2017 Wave 2 Publish: February 13, 2018 Wave 3 Publish: May 8, 2018 Wave 4 Publish: August 14, 2018 Wave 4 Press Release: August 16, 2018 Canadian Publish: September 4, 2018 Canadian Press Release: September 6, 2018
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 23, 2018 Press Release: October 25, 2018
U.S. National Banking Satisfaction Study	Explores retail banking customer satisfaction with the six largest retail banks in the United States. The study explores satisfaction across the full range of consumer products held at their primary bank [deposits, credit cards, mortgages, home equity loans/LOC, personal lines/loan and investments]. In addition to providing critical benchmarking, the study identifies the dominant factors driving banking customer satisfaction at the national level.	Publish: September 25, 2018 Press Release: September 27, 2018
U.S. and Canadian Banking Financial Advice and Sales Practices Study	Building on the inaugural study completed in 2017, this study examines the experience of customers who have received financial advice or opened new accounts with banks in the last year.	Publish: February 21, 2018 Press Release: February 26, 2018
U.S. Banking Mobile App Satisfaction Study and U.S. Credit Card Mobile App Satisfaction Study	Explore adoption and satisfaction with the features and content of leading financial institutions' mobile apps and identify what drives best-in-class mobile app customer experience. The studies provide critical benchmarking information and qualitative feedback on mobile apps based on nearly 6,800 customer responses..	Publish: June 5, 2018 Press Release: June 7, 2018

Custom pricing available for multiple study and multiple year subscriptions.

*Publish and press release dates subject to change

[Continued on next page]

U.S. and Canadian Financial Services Study Release Dates—2018

J.D. POWER

Study	Description	Release*
Banking [continued]		
U.S. Direct Banking Satisfaction Study	Explores customer satisfaction with their primary direct banking provider and the impact satisfaction has on bottom-line metrics, such as retention, loyalty, and advocacy. The study provides critical benchmarking information on the leading providers throughout the United States and identifies the dominant factors that drive retail banking customer satisfaction, based on survey responses from nearly 5,000 customers.	Publish: June 26, 2018 Press Release: June 28, 2018
Canadian Banking Mobile App Satisfaction Study	Explores adoption of and satisfaction with the features and content of leading financial institutions' mobile apps and identifies what drives best-in-class mobile app customer experience. The study provides critical benchmarking information and qualitative feedback on mobile apps for five major providers based on nearly 1,700 customer responses.	Publish: June 5, 2018 Press Release: June 7, 2018
U.S. Merchant Services Study	In its inaugural year, this new study analyzes customers' perceptions of their merchant services provider's ability to meet expectations. The research also highlights which merchant service providers perform well in managing relationships with their customers and why.	Publish: November 6, 2018 Press Release: November 8, 2018
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 26, 2018 Press Release: June 28, 2018
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: March 20, 2018 U.S. Press Release: March 22, 2018 Canadian Publish: August 14, 2018 Canadian Press Release: August 16, 2018
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: April 24, 2018 U.S. Press Release: April 26, 2018 Canadian Publish: September 11, 2018 Canadian Press Release: September 13, 2018
U.S. Group Retirement Satisfaction Study	Evaluate the needs and expectations of today's retirement account investor. This new study measures customer satisfaction with 401k providers service. The goals of this study are to provide a broad understanding of how 401k plan providers may improve investor satisfaction and enhance offerings in their plan sponsor conversations.	Publish: May 22, 2018 Press Release: May 24, 2018
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 24, 2018 Press Release: July 26, 2018
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 6, 2018 Press Release: November 8, 2018

Custom pricing available for multiple study and multiple year subscriptions.

*Publish and press release dates subject to change

[Continued on next page]

U.S. and Canadian Financial Services Study Release Dates—2018

J.D. POWER

Study	Description	Release*
Mortgage [continued]		
U.S. Home Equity Line of Credit (HELOC) Satisfaction Study	In its inaugural year, this new study evaluates customer satisfaction experience with the Home Equity Line of Credit origination and servicing experience. This study includes both new customers originating loans in the last 12 months and those with existing loans. The study provides in-depth review of the full loan experience.	Publish: March 27, 2018 Press Release: March 29, 2018
U.S. Correspondent Lending Study	Examines correspondent lender satisfaction with the nation's largest mortgage providers. The study evaluates the relationship between lenders and the correspondent lenders and measures the drivers of correspondent lender satisfaction.	Publish : October 23, 2018 Press release: October 25, 2018
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 9, 2018 U.S. Press Release: August 13, 2018 Canadian Publish: May 17, 2018 Canadian Press Release: May 21, 2018
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 8, 2018 Press Release: November 12, 2018

Custom pricing available for multiple study and multiple year subscriptions.

*Publish and press release dates subject to change