

2019 U.S. and Canada Financial Services Study Release Dates



POWER

Study	Description	Release*
Banking Intelligence		
U.S. and Canada Retail Banking Satisfaction Studies	Analyzes 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 study provides critical benchmarking information and identifies 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 study also provides a series of measurable and actionable Key Performance Indicators for satisfying customers.	U.S. Wave 1 Publish: 7/17/18 U.S. Wave 2 Publish: 10/16/18 U.S. Wave 3 Publish: 1/15/19 U.S. Wave 4 Publish: 4/23/19 U.S. Press Release: 4/25/19 Canada W1 Publish: 10/23/18 Canada W2 Publish: 4/30/19 Canada Press Release: 5/2/19
U.S. and Canada Credit Card Satisfaction Studies	Now in its thirteenth year, examines customer satisfaction with the products and services provided by their primary credit card issuer. A subscription to this study will help you identify and leverage key drivers of credit card satisfaction among customers in the United States. You'll also receive actionable insights about critical success factors like customer loyalty, advocacy and card usage.	U.S. Wave 1 Publish: 11/13/18 U.S. Wave 2 Publish: 2/12/19 U.S. Wave 3 Publish: 5/7/19 U.S. Wave 4 Publish: 8/13/19 U.S. Press Release: 8/22/19 Canada Publish: 9/10/19 Canada Press Release: 9/19/19
U.S. Small Business Banking Satisfaction Study	Explores small business owners' satisfaction with the largest financial institutions in the United States. A study subscription gives you access to critical insights about small business owners' perceptions of your bank's ability to meet their needs and expectations.	Publish: 10/22/19 Press Release: 10/31/19
U.S. Small Business Credit Card Satisfaction Study	The inaugural study in 2019 explores small business owners' satisfaction with the leading small business credit card issuers in the United States. The study analyzes critical success factors which drives cardholder satisfaction and reuse.	Publish: 11/14/19 Press Release: 11/20/19
U.S. National Banking Satisfaction Study	Explores customer satisfaction with the six largest retail banks in the United States. The study provides actionable insights about satisfaction with consumer products such as deposits, credit cards, mortgages, home equity loans, personal loans and investments. A subscription will empower you to uncover how customers are using different channels across their product portfolios and identify the elements that drive competitive differences in customer satisfaction.	Publish: 12/3/19 Press Release: 12/12/19
U.S. and Canada Banking Advice Satisfaction Studies	Explores customer experiences and best practices related to bank-provided advice and new account opening. A study subscription will help you to optimize your advisory and account opening initiatives using insights about priority customer segments, prominent customer financial-advisory needs, and methods of customer engagement that build trust.	Publish: 1/29/19 Press Release: 1/31/19
U.S. and Canada Banking and Card Credit Card Mobile App Satisfaction Studies	Identifies what drives best-in-class mobile app customer experience. The study provides critical benchmarking information and qualitative feedback on mobile apps based on thousands of customer responses.	Publish: 6/18/19 Press Release: 6/27/19

Custom pricing available for multiple study and multiple year subscriptions. *Publish and press release dates subject to change

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Study	Description	Release*
U.S. and Canada Online Banking and Card Credit Card Satisfaction Studies	Explore adoption and satisfaction with the features and content of leading financial institutions' online properties and identify what drives best-in-class online customer experience. The studies provide critical benchmarking information and qualitative feedback on online experiences based on nearly 6,800 customer responses.	Publish: 6/18/19 Press Release: 6/27/19
U.S. Direct Banking Satisfaction Study	Explores customer satisfaction with their primary direct banking provider. A study subscription gives you access to the tools needed to understand your company's performance and the impact satisfaction can have on bottom-line metrics like retention, loyalty, and advocacy. You'll also receive critical benchmarking information on your competitors throughout the United States.	Publish: 3/19/19 Press Release: 3/21/19
U.S. Merchant Services Study	Measures small business satisfaction with their card payment processor. A subscription will empower you to identify high-priority opportunities, improve your customer experience and create a powerful competitive differentiator. You'll learn the critical drivers of satisfaction across merchant segments and the experiences that distinguish the satisfaction leaders from the laggards.	Publish: 02/21/19 Press Release: 02/26/19
Wealth Management Intelligence		
U.S. Financial Advisor Satisfaction Study	Helps wealth management firms understand how effectively they are servicing their affiliated financial advisors. Delivering a financial advisor experience that maximizes both loyalty and productivity is critical for success, given the risk of dissatisfied advisors taking your firm's clients to a competitor. Your subscription will help you to understand and leverage the dynamics that drive satisfaction among different types of advisors.	Publish: 6/25/19 Press Release: 7/09/19
U.S. and Canada Full-Service Investor Satisfaction Studies	Explores the drivers of investor satisfaction and provides a benchmark of excellence for each factor studied. The research reveals dynamics that drive satisfaction among different types of investors such as portfolio size and trading activity. The study equips you with a broad understanding of how your full-service investment firm can improve customer satisfaction, loyalty, retention, and advocacy.	U.S. Publish: 3/12/19 U.S. Press Release: 3/14/19 Canada Publish: 4/11/19 Canada Press Release: 4/15/19
U.S. and Canada Self-Directed Investor Satisfaction Studies	Examines investor satisfaction with self-directed investment platforms. The study provides you with critical insights into the needs, expectations, and desires of today's self-directed investors. Your subscription will help you to identify best practices for improving satisfaction, loyalty, retention, and advocacy. You'll also be empowered with an understanding of dynamics—such as portfolio size and trading activity—that drive satisfaction among different types of investors.	U.S. Publish: 4/2/19 U.S. Press Release: 4/4/19 Canada Publish: 6/13/19 Canada Press Release: 6/19/19
U.S. Retirement Plan Participant Satisfaction Study	Evaluates the needs and expectations of today's retirement account investor and measures customer satisfaction with 401k provider services. Delivering a superior experience can benefit your company in many ways: it can positively influence plan sponsor decisions, drive brand awareness and promotion, and affect rollover decisions when employees leave their job.	Publish: 5/21/19 Press Release: 5/23/19
U.S. Asset Manager Satisfaction Study	Explores financial advisor perceptions of 3 rd party investment managers. Your study subscription includes analysis of critical topics like brand, marketing, practice management, wholesalers, range and quality of products, and pricing.	Publish: 10/15/19 Press Release: 10/17/19
Wealth Management Mobile App Satisfaction Study	Pinpoints the critical dimensions of satisfaction among users of wealth mobile apps. Subscribing to the study will help you understand and apply the key best practices that drive high satisfaction and engagement with mobile apps. This new study will guide your optimization efforts and provide insight into ease-of-use and key app functionality.	Volume 1 Publish: 2/28/19 Press Release: 3/11/19 Volume 2 Publish: 11/12/2019 Press Release 2: 11/21/2019

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Study	Description	Release*
Lending Intelligence		
U.S. Primary Mortgage Servicer Satisfaction Study	Analyzes customer satisfaction with their mortgage servicer. A study subscription gives you a clear understanding of the needs, expectations, and desires of today's mortgage customers. You'll be empowered to improve the effectiveness of interactions, plus drive improved cost and efficiency.	Publish: 7/23/19 Press Release: 8/01/19
U.S. Primary Mortgage Origination Satisfaction Study	Investigates customer satisfaction with the origination experience among mortgage lenders in the United States. You'll be equipped with actionable insights about reasons a customer chooses a lender, the influence of advertising and online research, increasing referrals, winning repeat business, and minimizing dissatisfaction. Study information will help you understand the drivers of customer satisfaction and prioritize your strategies around the dominant factors that impact satisfaction and behavior.	Publish: 11/5/19 Press Release: 11/14/19
U.S. Home Equity Line of Credit (HELOC) Satisfaction Study	Equips you with a full understanding of the end to end home equity line of credit (HELOC) customer journey. The study provides you with actionable insights about consideration, influences on customer choice, usage, satisfaction and loyalty. The tools in your subscription will empower data-driven decisions and prioritize your future strategies.	Publish: 3/12/19 Press Release: 3/14/19
U.S. Personal Loan Study	Examines customer satisfaction throughout the personal loan customer journey. As a subscriber, you'll get access to critical information about customer research and consideration, the application process, usage, payments and more. We'll benchmark your company's performance against your competitors, so you can prioritize improvements, drive higher satisfaction and positively impact your bottom line.	Publish: 3/21/19 Press Release: 3/25/19
Automotive Finance Intelligence		
U.S. and Canada Dealer Financing Satisfaction Studies	Strong dealer/lender relationships continue to support automotive sales and customer satisfaction. Understanding the nuances of these relationships through the voice of the customer is the foundation of the <i>J.D. Power 2019 U.S. Dealer Finance Satisfaction StudySM</i> . A subscription will empower you to identify the critical dimensions of satisfaction among auto dealers with their auto finance providers. The study will help you to pinpoint your strengths and opportunities for improvement against competitors.	U.S. Publish: 8/8/19 U.S. Press Release: 8/14/19 Canada Publish: 5/16/19 Canada Press Release: 5/21/19
U.S. Consumer Financing Satisfaction Study	Analyzes customer satisfaction with their auto finance provider. A study subscription gives you access to actionable insights about billing and payment processing, mobile app experience, onboarding, origination and website experience. The study includes information gives you a clear understanding of satisfaction levels throughout your entire financing experience.	Publish: 11/7/19 Press Release: 11/14/19

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