

THE EXCELLENT BANKING EXPERIENCE MEANS BUSINESS

Study Overview

Understanding your customers or members is critical to success. Let them tell you what products and services they need and want and how well their expectations are being met. Then know what the payoff is for delivering an excellent banking experience. Here's the outline.

Key Findings and Foresight Insights

Banking Relationships

- ✓ The demographics of the market
- ✓ What products/services are currently purchased
 - ✓ By household age
 - ✓ By household income

Banking Access – Banks and Credit Unions

- ✓ Mobile, online, convenient branch locations, ATMs

Choosing/Maintaining/Satisfaction – The Banking Relationship

- ✓ Reasons for choosing primary bank or credit union
- ✓ Satisfaction with products and services

Improving Satisfaction ...Moving the Needle

- ✓ Satisfaction scores – what's important
- ✓ Customer and member evaluation of products and services
- ✓ Evaluation of fair fees and reputation

Improving Satisfaction – What's the Payoff

- ✓ Highly satisfied vs. moderately satisfied – the payoff

Communicating with Customers/Members

- ✓ Demographics, - media, personal interaction, digital

Source Data

- 10,770 bank customers and credit union members
- Sampled – September 2019 – March 2020
- Weighted by U. S Census population and demographics in 44 U. S. markets



Subscription:
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The markets available for the key findings in your market

MARKETS		
Orange County, CA	Houston	Portland, OR
Atlanta	Indianapolis	Raleigh - Durham
Baltimore	Jacksonville	Rochester, NY
Boston	Kansas City	Sacramento
Buffalo	Las Vegas	Salt Lake City
Charlotte	Los Angeles	San Antonio
Chicago	Louisville	San Diego
Cincinnati	Miami	San Francisco
Cleveland	Oklahoma City	San Jose
Dallas Fort Worth	Milwaukee	Seattle
Grand Rapids	Minneapolis	St. Louis
Greenville	Nashville	Tampa
Hampton Roads	Philadelphia	Washington, D. C.
Harrisburg	Phoenix	
Hartford	Pittsburgh	