J.D. Power U.S. Wealth Mobile App Study

THE J.D. POWER MOBILE APP SATISFACTION BENCHMARK evaluates full-service and self-directed investor satisfaction with wealth management mobile apps. This analysis enables organizations to identify opportunities to improve the mobile wealth app experience for personal brokerage clients.

Having the right customer information can make a real difference. Our team will provide you with insights about what the data means and how to effectively use it. This is where the true value of an information investment lies—informed, data-driven action.

EXPERIENCES EXPLORED

We pinpoint the factors that matter most to investors using digital channels and what drives their satisfaction. Using this data, we set a quality benchmark for the industry, and provide a thorough understanding of the digital needs, expectations, and desires of today’s full-service, self-directed, and retirement plan investors.

To help you drive results, customers surveyed for this analysis answer questions about key topics such as:

- Logging in
- Account balance and activity
- Investment performance
- Review your portfolio
- Research investment options
- Transfer funds
- Trading
- Summing it up
- Advocacy & Loyalty
- Current events and market conditions

SUBSCRIPTION DELIVERABLES

- Customized executive presentation and strategy session that gives you data-driven, actionable recommendations for achieving your strategic business goals
- Data and analytical tools for performance insights and competitive comparisons including access to PowerSource
- Executive Overview Dashboard
- Detailed Results Dashboard
- Cross Table Tool
- Verbatim Comments
- Executive briefing document highlighting key trends and insights across the industry
- Brand-level scorecards benchmarking each profiled company’s performance compared with the industry across key drivers of satisfaction, loyalty and advocacy metrics
- The complete study data file with consumer survey responses

For more information about J.D. Power products and services, please contact your J.D. Power account manager or insights@discover.jdpower.com

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