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Consumers Rate Their Financial Institutions

Value And Service Ratings For 30 Banks, Investment Firms, And Insurers

by [Bruce D. Temkin](#)

with Eric M. Dolan, Peter Hult

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EXECUTIVE SUMMARY

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Forrester asked consumers to rate their primary bank, investment firm, and insurer on two categories of criteria: value delivered and service provided. When we analyzed the ratings for 30 different financial institutions, we found that credit unions, Edward Jones, and USAA were at the top of the list in both categories. Other firms that received above-average scores on most of the criteria: Ameriprise Financial, American Family Insurance, and State Farm. At the other end of the spectrum, Citibank, Chase, Merrill Lynch, Nationwide Mutual Insurance, Smith Barney, and SunTrust received below-average scores on most of the criteria.