

Online banking survey

Please do not write your name or any account details. Answer about the bank you use most, and skip any question you would rather leave.

Branch or group

Date

For each statement, tick one box from 1 (strongly disagree) to 5 (strongly agree).

- 1 How do you do most of your banking?
☐ On my phone ☐ On a computer or tablet ☐ At a branch counter ☐ At an ATM ☐ Calling the bank
- 2 How often do you log in to your bank online?
☐ Daily ☐ A few times a week ☐ Weekly ☐ A few times a month ☐ Less often ☐ Never
- 3 In the last 3 months, did anything go wrong when you banked online?
☐ No ☐ Yes, it was fixed ☐ Yes, still not fixed

STATEMENT	STRONGLY DISAGREE					STRONGLY AGREE				
4 Everyday jobs take me less time online than at a branch.	1	2	3	4	5					
5 The menus are laid out the way I expect.	1	2	3	4	5					
6 Online banking works whenever I try to use it.	1	2	3	4	5					
7 Money I send arrives on the date the bank shows.	1	2	3	4	5					
8 My balance and transactions online are correct.	1	2	3	4	5					
9 I trust my bank to keep my money and details safe online.	1	2	3	4	5					
10 The login steps feel secure without slowing me down.	1	2	3	4	5					
11 How likely are you to recommend your bank's online banking to a friend?										
Not at all likely 0 1 2 3 4 5 6 7 8 9 10 Extremely likely										

12 What one change would make online banking with your bank better for you?

Optional questions (1 of 3)

Add any of these to the core questions. Keep the numbering running on from page one.

When something went wrong

13 What went wrong most recently?

- ☐ Could not log in ☐ A payment problem ☐ Card blocked ☐ Error or crash ☐ Something else

14 Where did you go for help first?

- ☐ Chat in the app ☐ Help pages ☐ Phone call ☐ Branch ☐ Secure message

15 How many contacts did it take to sort out?

- ☐ One ☐ Two ☐ Three or more ☐ Not sorted yet

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
16 The bank fixed the problem quickly.	1	2	3	4	5
17 Any fees or losses the problem caused were refunded.	1	2	3	4	5
18 I could reach a real person when I needed one.	1	2	3	4	5

Payments and transfers

19 How do you usually pay bills?

- ☐ Bank bill pay ☐ On the biller's site ☐ Automatic debit ☐ By card ☐ Cash or check

20 How do you usually send money to friends or family?

- ☐ My bank's app ☐ A payment app ☐ Cash ☐ Check ☐ I rarely do

STATEMENT	VERY DIFFICULT				VERY EASY
21 How easy is it to add a new payee and pay them?	1	2	3	4	5
22 In the last 12 months, did a payment arrive late or go astray?					
☐ No ☐ Yes, it was late ☐ Yes, wrong account ☐ Not sure					

Thank you. Your answers are anonymous.

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Optional questions (2 of 3)

Add any of these to the core questions. Keep the numbering running on from page one.

Security and scam checks

23 Which of these security features do you use? (tick all that apply)

- ☐ Two-step login ☐ Face or fingerprint ☐ Account alerts ☐ Card lock ☐ None of these

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
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24 I know how my bank will contact me, and how it never will.	1	2	3	4	5
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25 In the last 12 months, has someone pretended to be your bank to reach you?

- ☐ Yes, by text ☐ Yes, by phone ☐ Yes, by email ☐ No ☐ Not sure

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
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26 I would know what to do about a payment I did not make.	1	2	3	4	5
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27 What worries you most about banking online?

- ☐ Scam messages ☐ Someone getting in ☐ Payment mistakes ☐ How my data is used
☐ Nothing much

Choosing and switching banks

28 Do you have an account with an online-only bank?

- ☐ Yes, my main one ☐ Yes, a second one ☐ No, but I have looked ☐ No

29 In the last 12 months, have you thought about moving your main account?

- ☐ No ☐ Yes, but I stayed ☐ Yes, I am moving ☐ I already moved

30 What would make you move your main account? (tick all that apply)

- ☐ Lower fees ☐ A better app ☐ Better savings rate ☐ Better help ☐ A branch nearby ☐ Nothing

STATEMENT	VERY UNLIKELY				VERY LIKELY
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31 How likely are you to be banking with them a year from now?	1	2	3	4	5
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Optional questions (3 of 3)

Add any of these to the core questions. Keep the numbering running on from page one.

If you rarely bank online

32 What keeps you from banking online more? (tick all that apply)

- ☐ Security worries ☐ I prefer a person ☐ Not sure how ☐ No smartphone ☐ Poor internet
☐ No need

33 Would you try it if someone at the bank showed you how?

- ☐ Yes ☐ Maybe ☐ No

About you (optional)

34 How old are you?

- ☐ Under 25 ☐ 25 to 34 ☐ 35 to 44 ☐ 45 to 54 ☐ 55 to 64 ☐ 65 or over

35 What kind of bank is your main bank?

- ☐ Large national bank ☐ Regional or local bank ☐ Credit union ☐ Online-only bank ☐ Not sure

36 How long have you banked with them?

- ☐ Under 1 year ☐ 1 to 5 years ☐ 6 to 10 years ☐ Over 10 years

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