

Survey: All States Save to Win 2017 Survey

We are excited that you are taking this important step in building a savings foundation. In order to get a better understanding of your needs, we invite you to participate in a Save to Win Survey that is being facilitated by your Credit Union, your Credit Union State League, and national non-profit Commonwealth (based in Boston, MA).

This survey will take approximately 5 minutes to complete, and it is very important for us to learn from your input.

Your participation in this study is completely voluntary. If you feel uncomfortable answering any questions, you can withdraw from the survey at any point. Your survey responses will only be used to help us understand the Save to Win product and its impact on helping Americans save. Data from this research will be reported only in the aggregate so your individual responses will remain strictly confidential.

Thank you in advance for your time and feedback!

*** What State is your Credit Union based in?**

- Arizona
 - Arkansas
 - California
 - Connecticut
 - Georgia
 - Hawaii
 - Illinois
 - Indiana
 - Michigan
 - Missouri
 - Ohio
 - Oregon
 - Texas
 - Utah
 - Virginia
 - Washington
 - Wisconsin
-

What is the name of your Credit Union? (Michigan)

- Adventure CU
 - Astera CU
 - Diversified Members CU
-

- Family First CU
 - Safe Harbor CU
 - Security CU
 - Team One CU
-

What is the name of your Credit Union? (Arizona)

- First CU
-

What is the name of your Credit Union? (Wisconsin)

- Iron County Community CU
 - Verve, a CU
-

What is the name of your Credit Union? (Ohio)

- Golden Circle CU
-

What is the name of your Credit Union? (Utah)

- Freedom CU
-

What is the name of your Credit Union? (Connecticut)

- Northeast Family FCU
-

What is the name of your Credit Union? (Indiana)

- Afena FCU
 - Dubois-Pike FCU
 - Financial Health FCU
 - Perfect Circle CU
-

What is the name of your Credit Union? (Oregon)

- Wauna FCU
-

What is the name of your Credit Union? (Illinois)

- Abri CU
 - Electro Savings CU
 - Great Lakes CU
 - Members Alliance CU
 - Members First Community CU
-

What is the name of your Credit Union? (Washington)

- Progressions CU
-

What is the name of your Credit Union? (Missouri)

- Catholic Family CU
 - Electro Savings CU
 - Gateway Metro FCU
 - Neighbors CU
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What is the name of your Credit Union? (Texas)

- A+ FCU
 - Coastal Community and Teachers CU
 - Common Cents CU
 - InTouch CU
 - Las Colinas FCU
 - Light Commerce CU
 - People's Trust FCU
 - Resource One CU
 - Southwest 66 CU
 - Southwest Financial FCU
 - Space City CU
 - Tarrant County's CU
 - Transtar FCU
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What is the name of your Credit Union? (Arkansas)

- Hurricane Creek FCU
-

What is the name of your Credit Union (California)

- Delta Schools FCU
 - Desert Valleys FCU
 - Kaiperm FCU
 - SESLOC FCU
-

What is the name of your Credit Union (Virginia)

- Peoples Advantage FCU
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What is the name of your Credit Union (Georgia)

- Kinetic FCU
-

What is the name of your Credit Union (Hawaii)

- Hawaii USA FCU
 - Maui Teachers FCU
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What branch of your credit union do you most frequently visit?

Section 1

The following questions are about your household, which includes everyone you live with and with whom you share income and expenses. That may include you, your spouse, and other working adults. You should answer the following questions based on the financial situation of your entire household.

Does your household save regularly? (select one)

- Yes, a fixed amount every month
 - Yes, whatever is left over at the end of the month
 - No, my household doesn't save regularly
-

Which of the following statements best describes where your household's savings come from? (select one)

- Save a portion of total household income
-

- Save income of one family member, spend the other
- Save only from "extra" income (e.g. odd jobs, tips, bonuses)
- I/we don't save
- Other (please specify)

Does your household have enough savings to cover three months' worth of expenses if your household faced unexpected shocks such as sickness, car or household repair, or job loss? (select one)

- Yes
- No, I have some set aside but not enough for three months of expenses
- No, I used to have some but not anymore
- No, I have never had money set aside to cover unexpected emergencies

Not including your mortgage, if you were to add up all of the money in your savings accounts and your other financial assets today, approximately how much would it amount to?

- \$0
- \$1 to \$2,000
- \$2,001 to \$5,000
- \$5,001 to \$10,000
- \$10,001 to \$20,000
- \$20,001 to \$40,000
- Above \$40,000

Not including your mortgage, if you were to add up all of your financial debt (such as student loans, credit cards, auto loans, medical debt, etc.) today approximately how much would it amount to?

- \$0
- \$1 to \$2,000
- \$2,001 to \$5,000
- \$5,001 to \$10,000
- \$10,001 to \$20,000
- \$20,001 to \$40,000
- Above \$40,000

What is your household's combined annual income?

- \$0 - \$9,999
 - \$10,000 - \$19,999
 - \$20,000 - \$29,999
 - \$30,000 - \$39,999
 - \$40,000 - \$49,999
 - \$50,000 - \$59,999
 - \$60,000 - \$69,999
 - \$70,000 or more
-

My household's monthly income:

- Does not change from month to month
- Changes a little from month to month
- Changes a lot from month to month
- Other

Section 2

The following questions are about you as an individual, so you should answer based on your individual situation and preferences.

Did you join the Credit Union for the Save to Win account?

- Yes, I joined for the Save to Win account
 - No, I was already a member
 - No, I joined for another product but ended up opening a Save to Win Account
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Do you have a regular savings account (apart from your Save to Win account) at this or another bank or credit union? If you have more than one savings account, select the option that matches the combined amount you have saved in all savings accounts. (select one)

- Yes - with \$100 or more in it
 - Yes - with less than \$100 in it
 - No - but I used to have one
 - No - I have never had a savings account at another bank or credit union
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Do you have a share certificate or a certificate of deposit (CD) at this or another bank or credit union? If you have more than one CD, select the option that matches the combined amount you have saved in all CDs. (select one)

- Yes - with \$500 or more in it
 - Yes - with less than \$500 in it
 - No - but I used to have one
 - No - I have never had a certificate of deposit at another bank or credit union
-

How did you hear about Save to Win? (select all that apply)

- My credit union
- My family or friends
- News publication
- TV or radio
- Social media (e.g. Facebook, Twitter)
- Other

- Blog post
-

Save to Win makes me _____ about my credit union (select one).

- More excited
 - Less excited
 - Neither more nor less excited
-

Building savings would make me _____ to use other financial products at this credit union (select one).

- More likely
 - Less likely
 - Neither more nor less likely
 - I'm not sure
-

My age is:

- 18 - 24
 - 25 - 29
 - 30 - 34
-

- 35 - 44
 - 45 - 54
 - 55 plus
-

My gender is:

- Female
- Male
- Prefer not to answer
- Self-identify (please specify)

My current family status is:

- Single with no dependent children
 - Single with dependent children
 - Married or partnered with no dependent children
 - Married or partnered with dependent children
-

My racial/ethnic background is (check all that apply):

- African-American/Black
- Asian
- Hispanic/Latino
- White (non-Hispanic)
- Native American
- Other