



# Custom Graphic Analysis Example

**SRIC-BI CFD Affluent Segments:  
High Level Affluent**



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# Segment Definitions: High Level Affluent

- **Total Affluent:** 2005 HHI  $\geq$  \$100K OR total assets excl. home value  $\geq$  \$500K
- **Mass Affluent:** Affluent household AND household has a net worth of less than \$1,000,000
- **Millionaires:** Affluent household AND household has a net worth of equal to or greater than \$1,000,000
- **Wealthy Retired:** Affluent household AND household is retired
- **Entrepreneurs:** Affluent household AND ownership or operation of a business or professional practice is the primary occupation of either the male or the female head of household

# Primary Head - Highest Level of Education (percent of households)

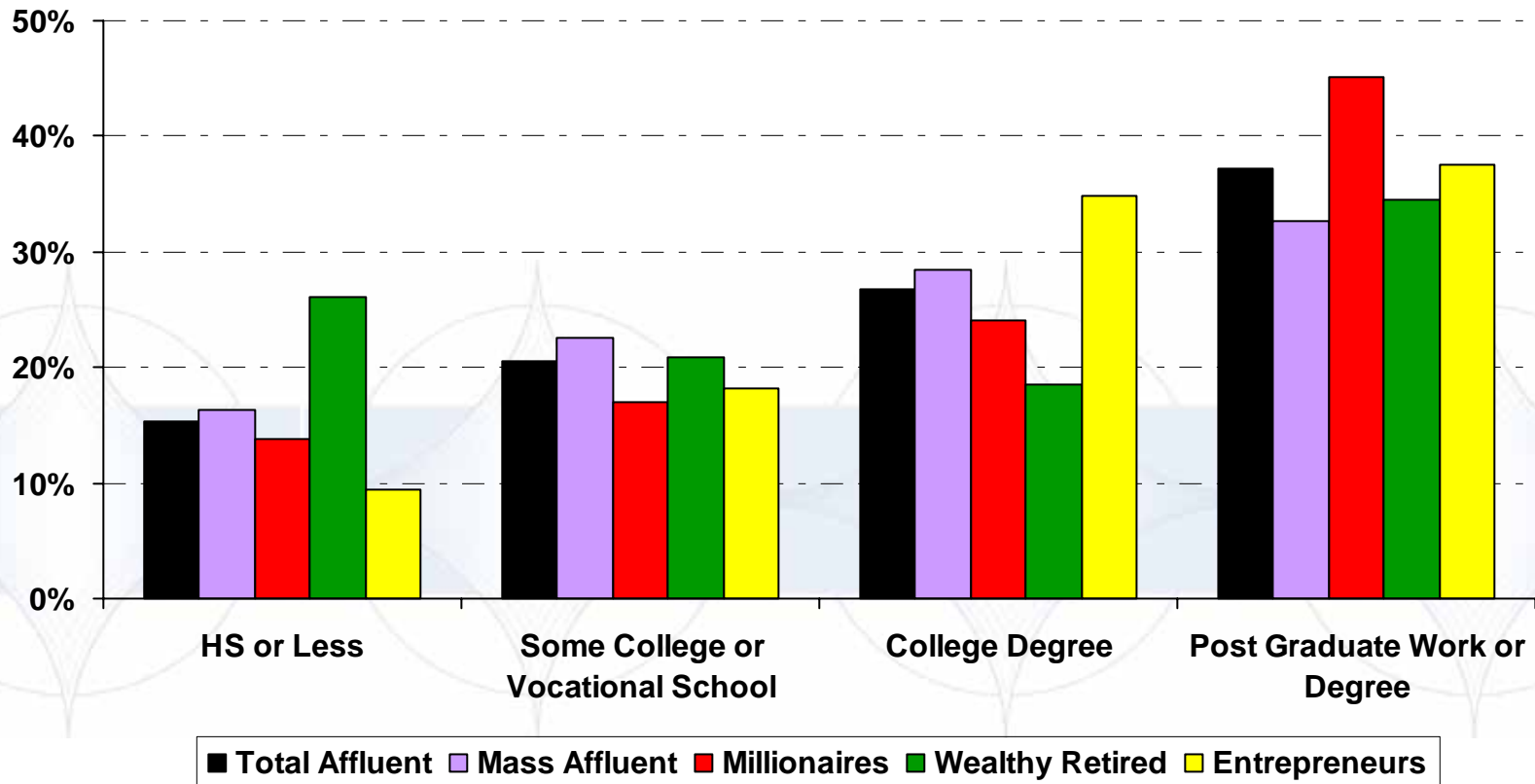


Table O-8 : Education - Primary head of household  
 Base: All U.S. Households  
 Questionnaire Page O-2, Q.8

# Marital Status (percent of households)

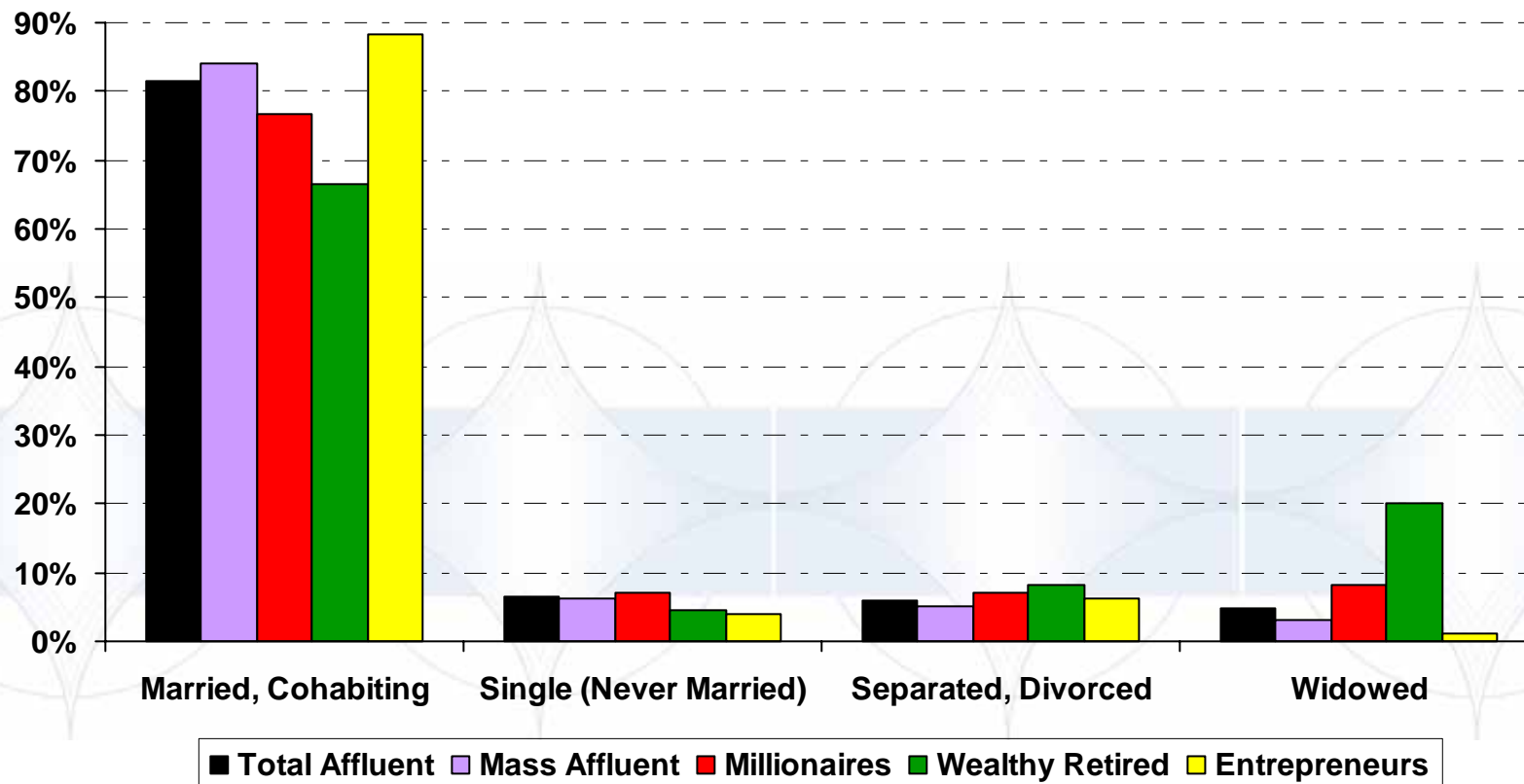
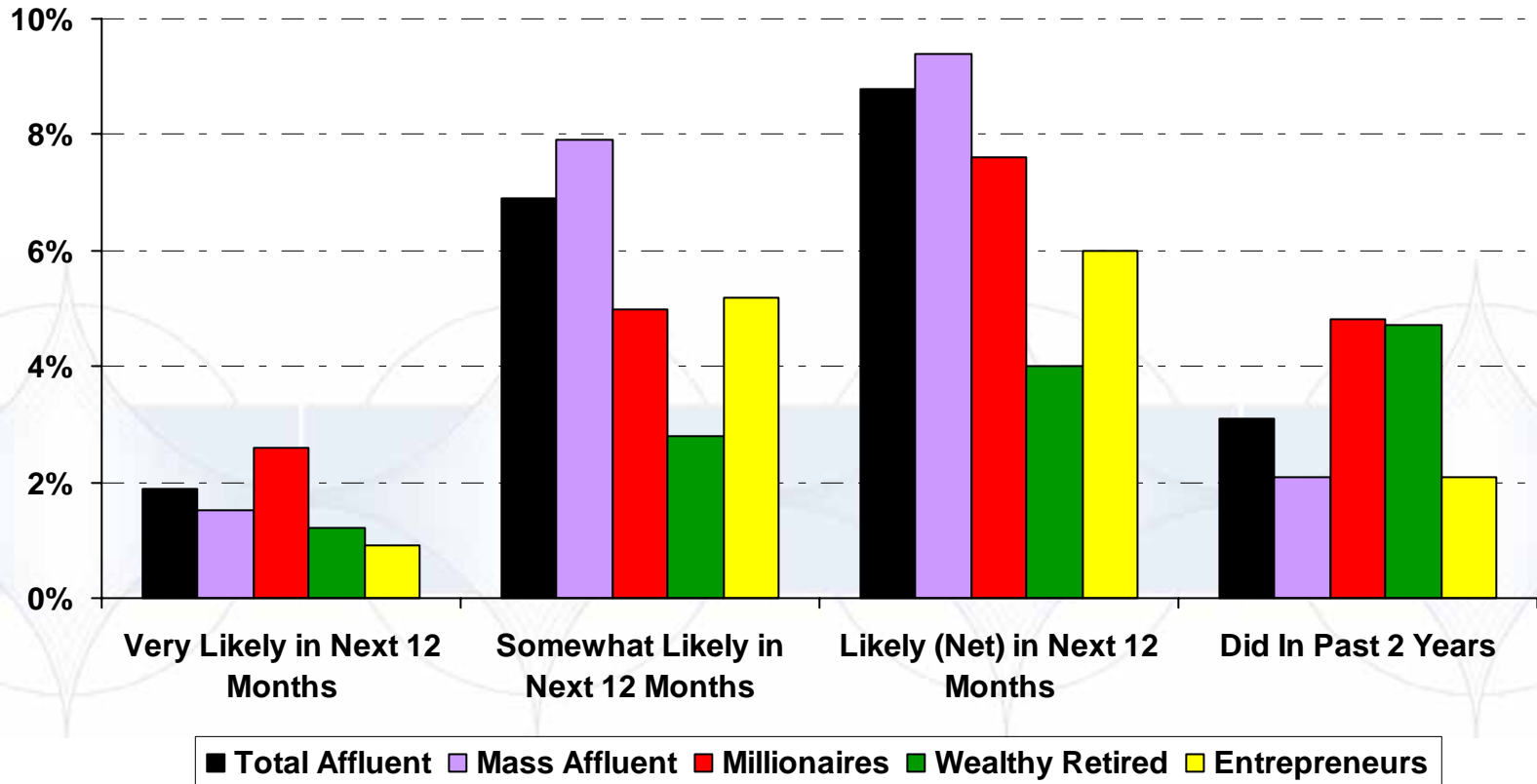


Table A-7 : Marital status  
 Base: All U.S. Households  
 Questionnaire Page A-2, Q.7, Col 2

# Likely to Buy / Recently Bought Long-Term Care Insurance (percent of households)



Tables M-6A\_3, M-6B: Likely to buy/recently bought long-term care insurance  
 Base: All U.S. Households  
 Questionnaire Page M-3, Q. 6, Cols A, B, Item 3

# Incidence of Internet Banking (percent of households)

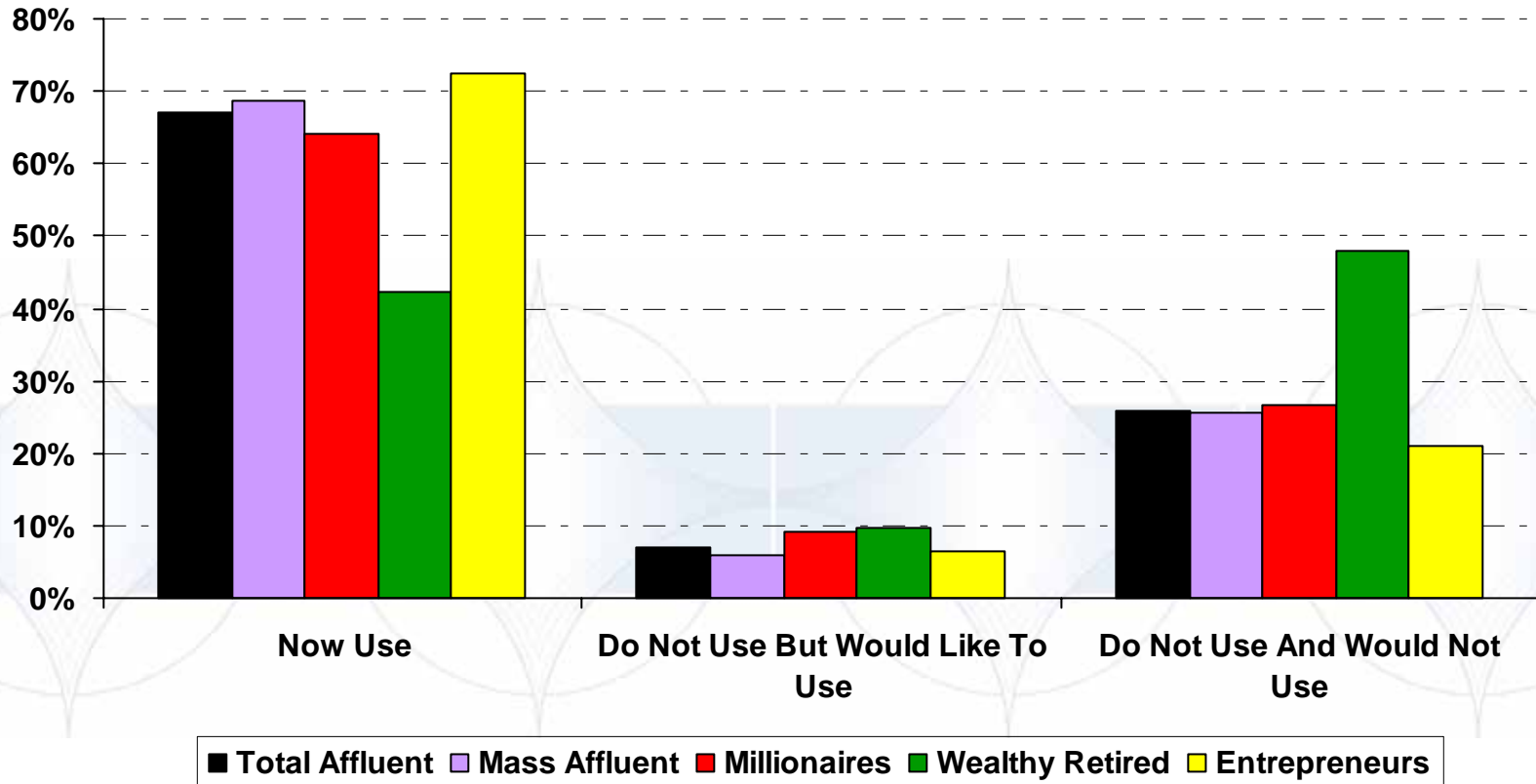


Table B-9aA: Use of Internet banking  
Base: Have access to the Internet  
Questionnaire Page B-5, Q.9a, Col A



# Incidences of Owning Securities (percent of households)

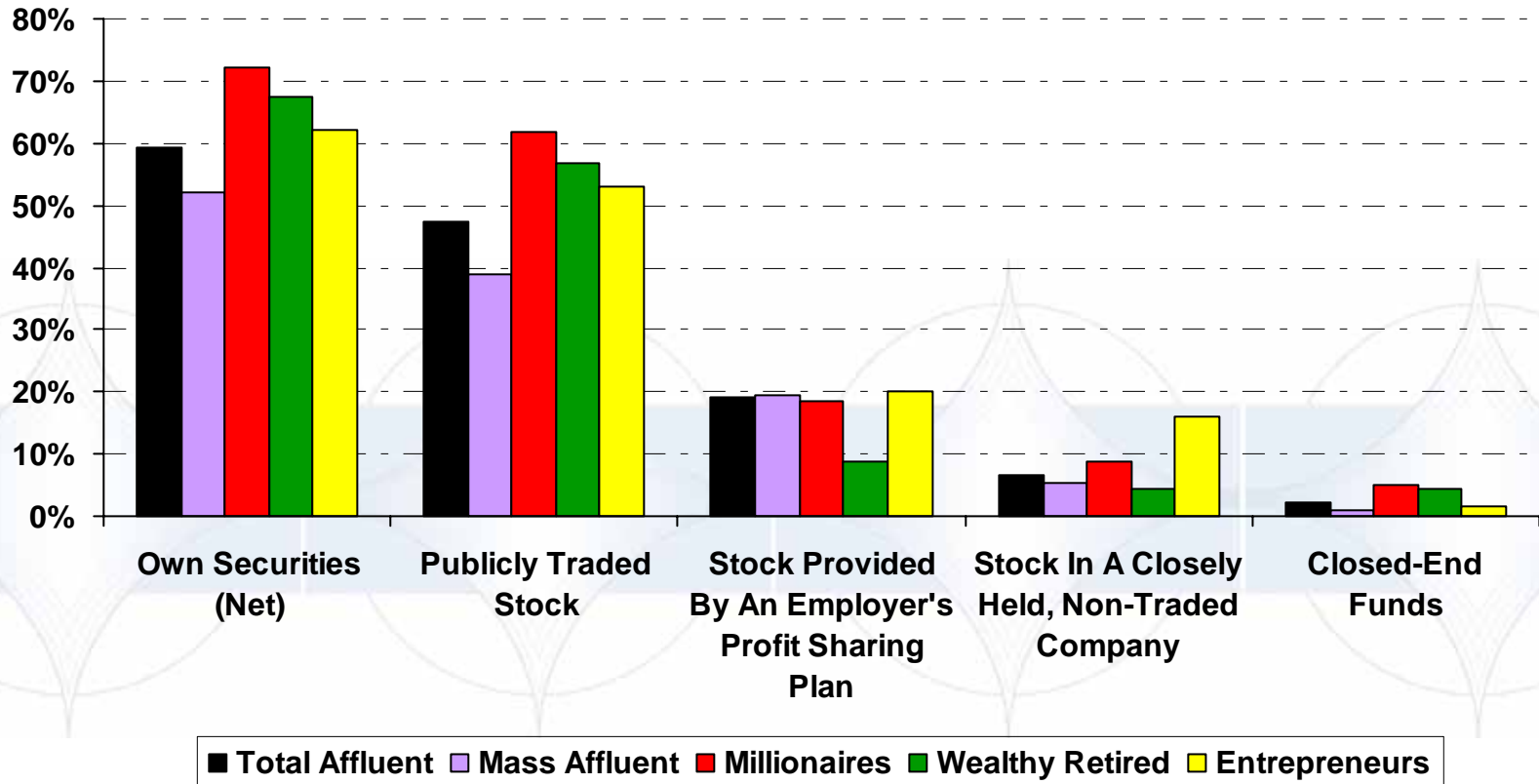
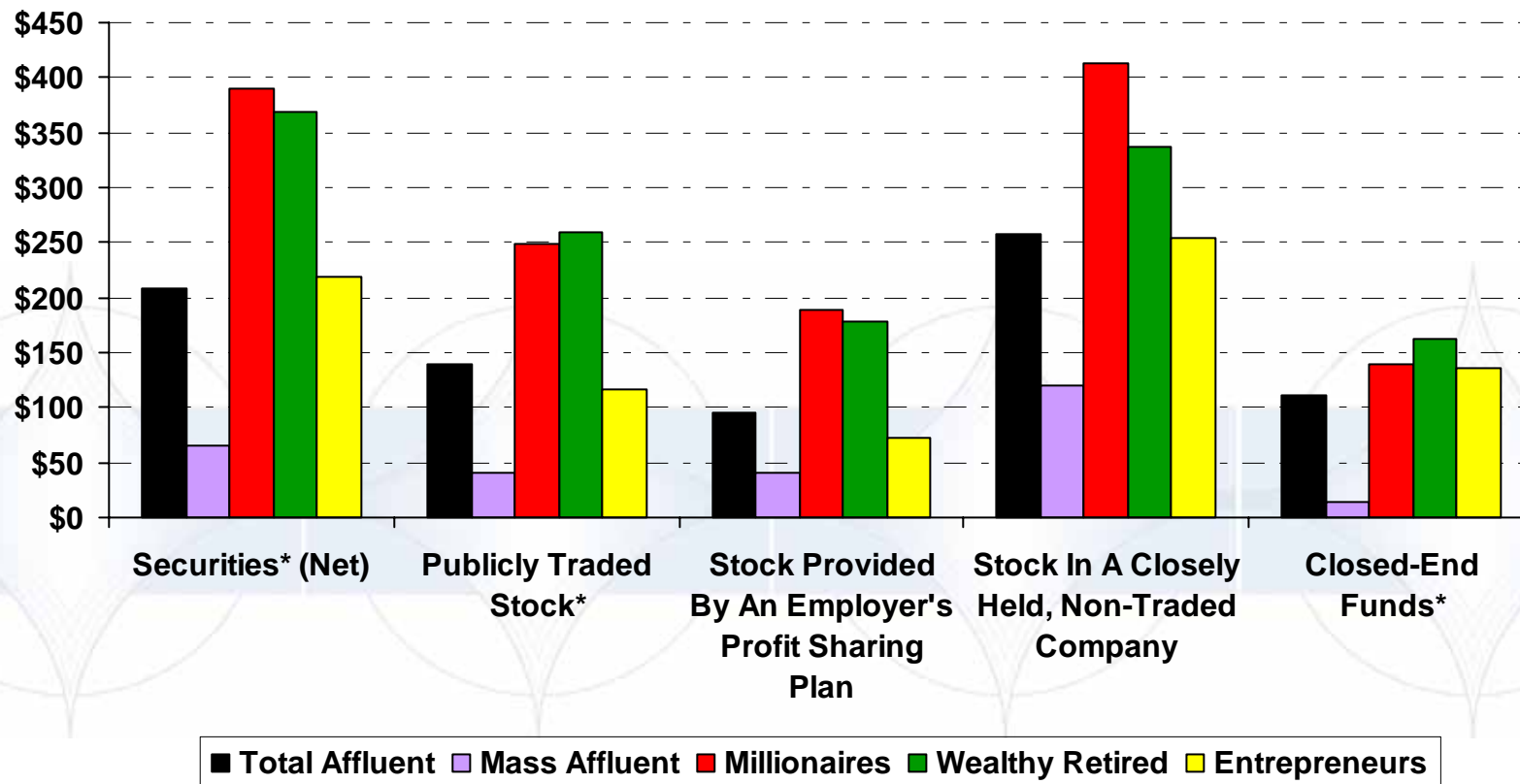


Table E-17A : Ownership of securities - Summary  
 Base: All U.S. Households  
 Questionnaire Pages E-5, Q.10a; E-9, Q.17, Col A; E-4, Q.8a, Col A

# Mean Value of Securities (\$000s)



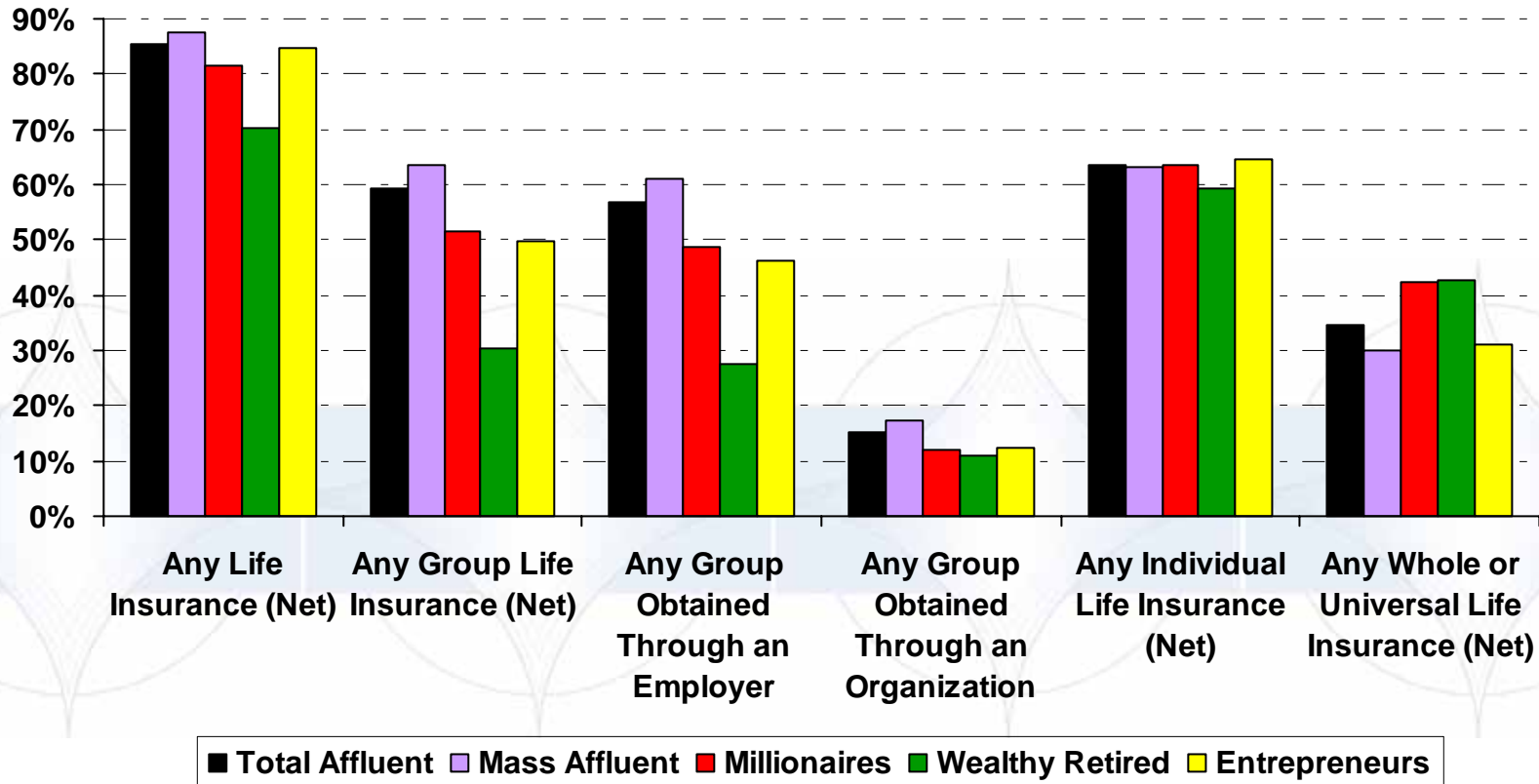
Tables E-17B\_MEAN, E-17B\_2, E-17B\_3: Mean value of all securities, publicly and non-traded stock, and closed-end funds (\$000s, excl 0) (\*missing value substitution applied)

Base: Own specific security

Questionnaire Page E-9, Q. 17, Col A, Net Items 1-14 and Items 1-4

Source: The 2006-07 MacroMonitor

# Incidences of Owning Life Insurance (percent of households)



Tables L-2, L-5: Incidences of types of life insurance  
 Base: All U.S. Households  
 Questionnaire Pages L-1, Q.2; L-2, Qs.4a, Col A,B, Q.5; L-3, Q.7a; L-4, Q.8a

# Incidences of Owning Homeowner's and Renter's Insurance (percent of households)

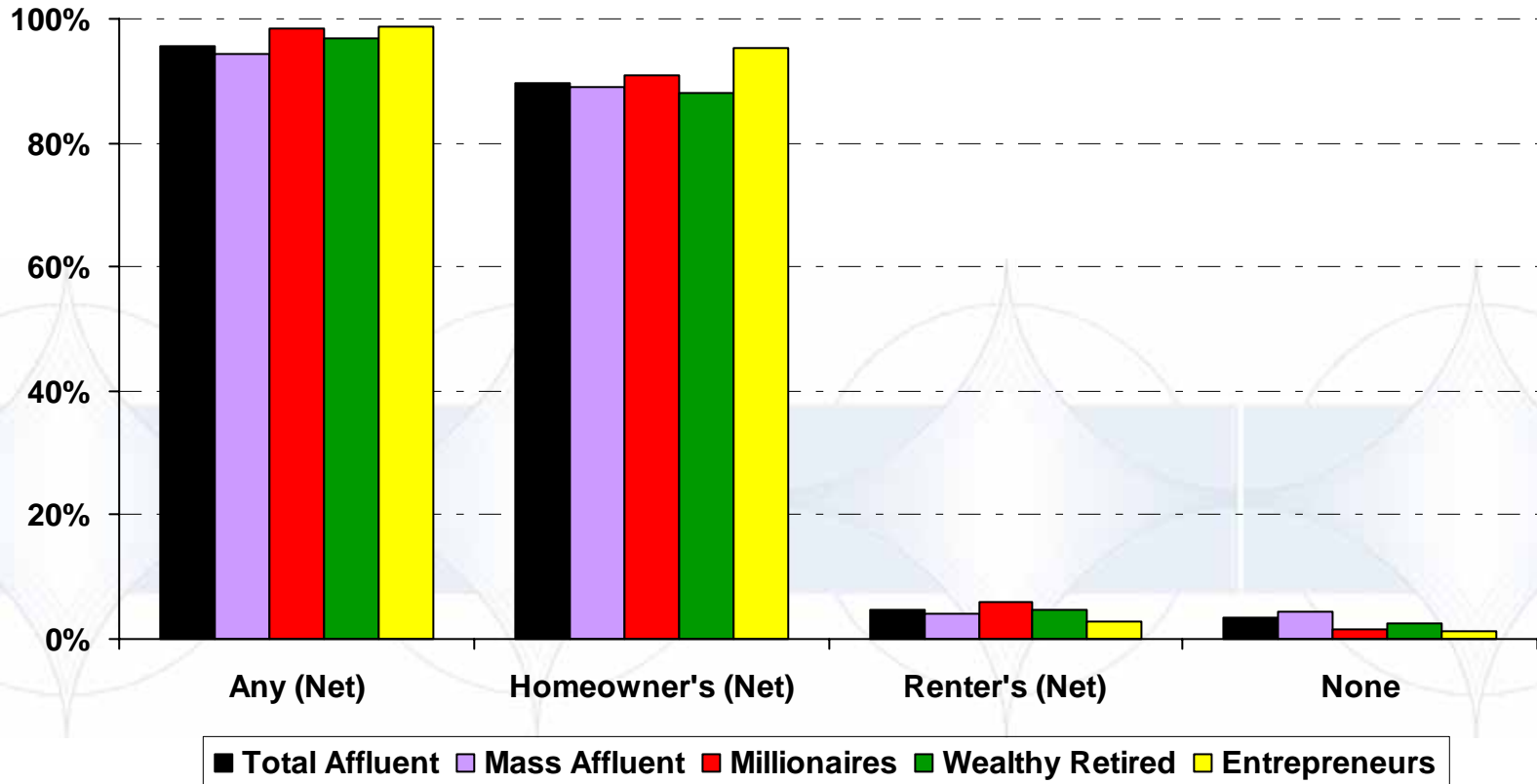


Table G-3a : Incidence of homeowner's or renter's insurance on primary residence  
 Base: All U.S. Households  
 Questionnaire Page G-1, Q.3a

# Incidence of Having Loans on Primary Home (percent of households)

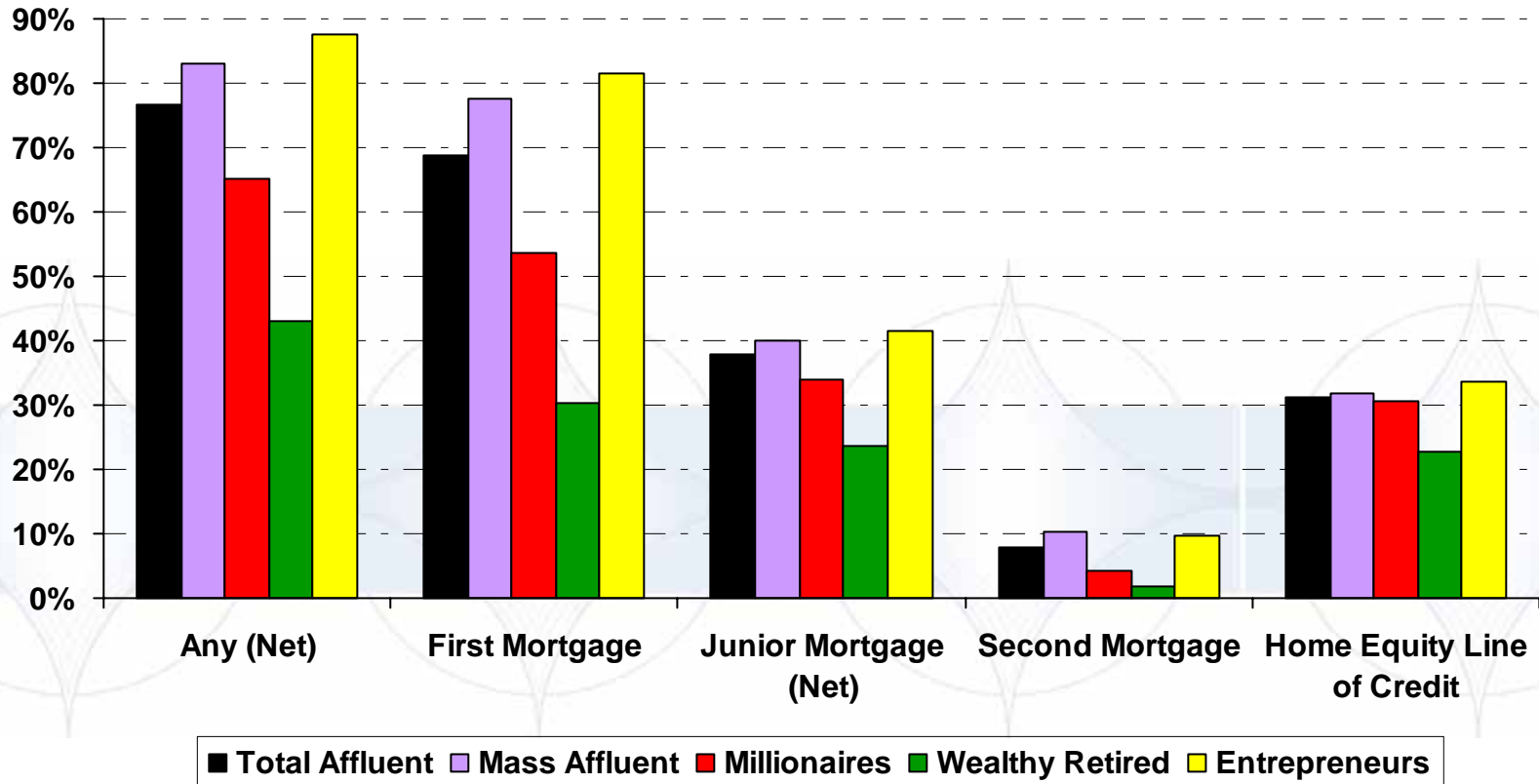


Table G-6a : Incidence of loans on primary residence - Summary  
 Base: All U.S. Households  
 Questionnaire Page G-2, Q.6a, Cols A,B,C

# Mean Debts on Primary Home (\$000s)

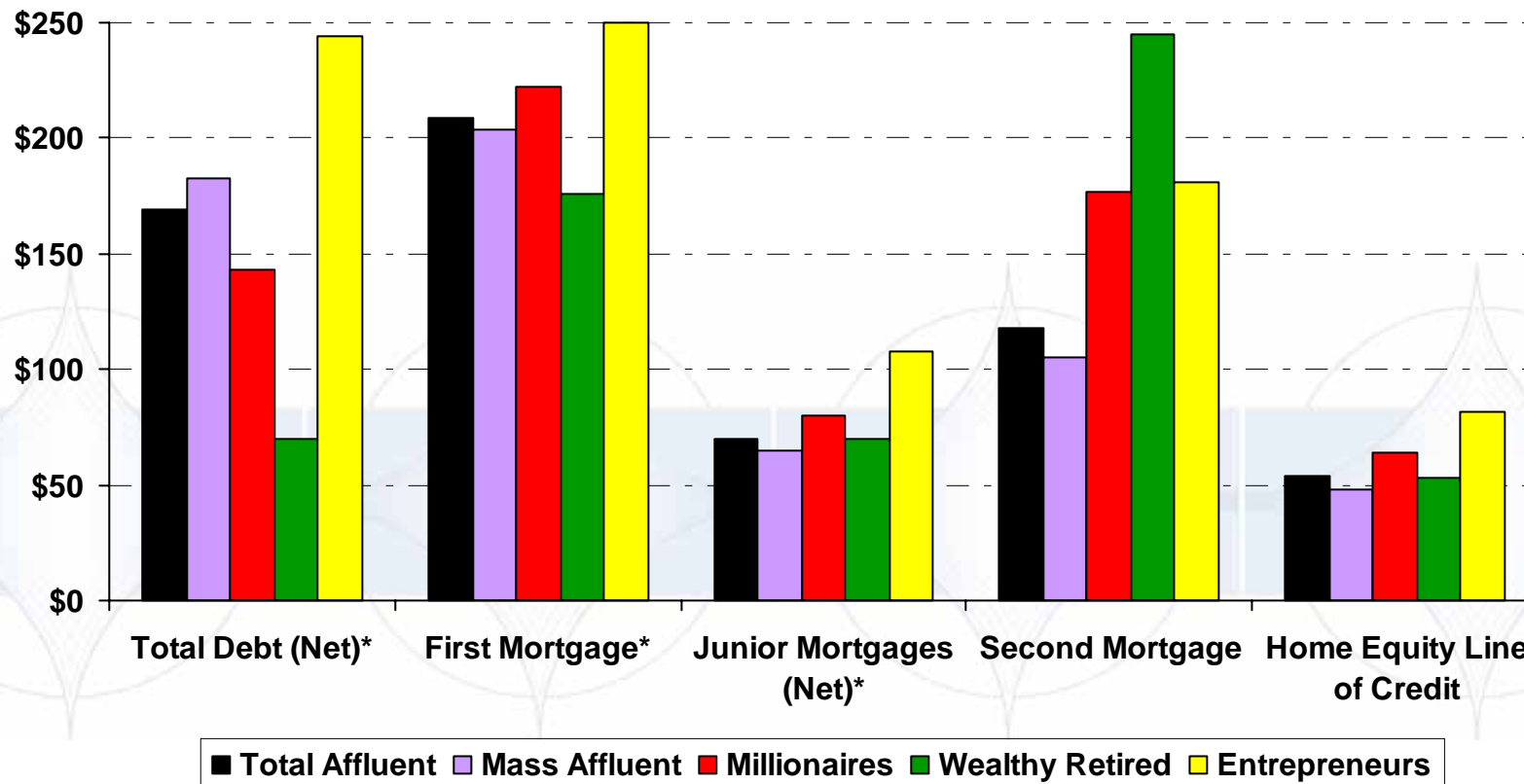


Table RE5, LIAB\_2A and LIAB\_2B: Mean debts on primary home (\$000s, incl 0) (\*missing value substitution applied)  
 Base for Total Debt: Own Home  
 Base for other loans: Have type of loan on primary home  
 Questionnaire Page G-4, Q. 14, Cols A, B, C

# Incidences of Owning Retirement Accounts (percent of households)

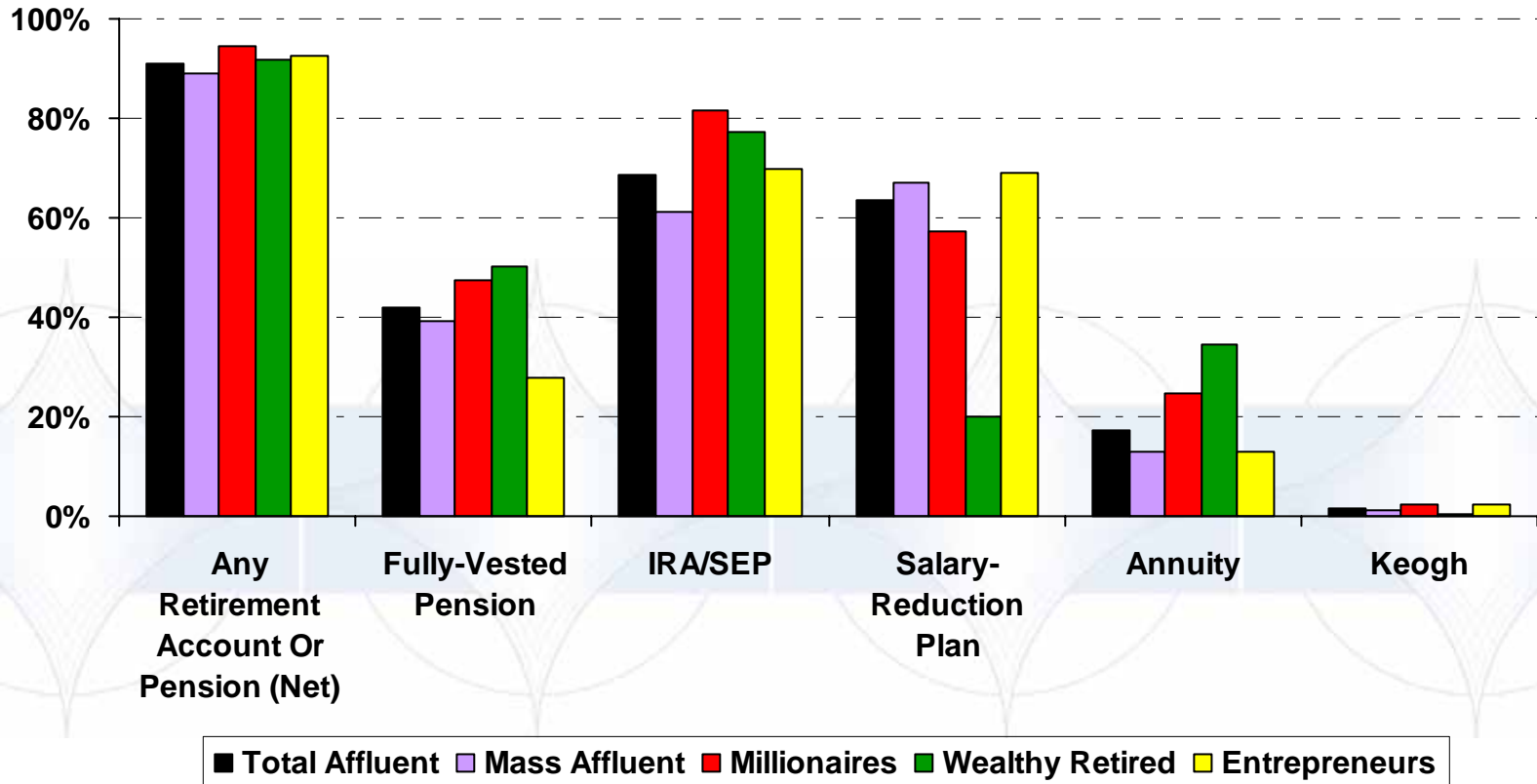
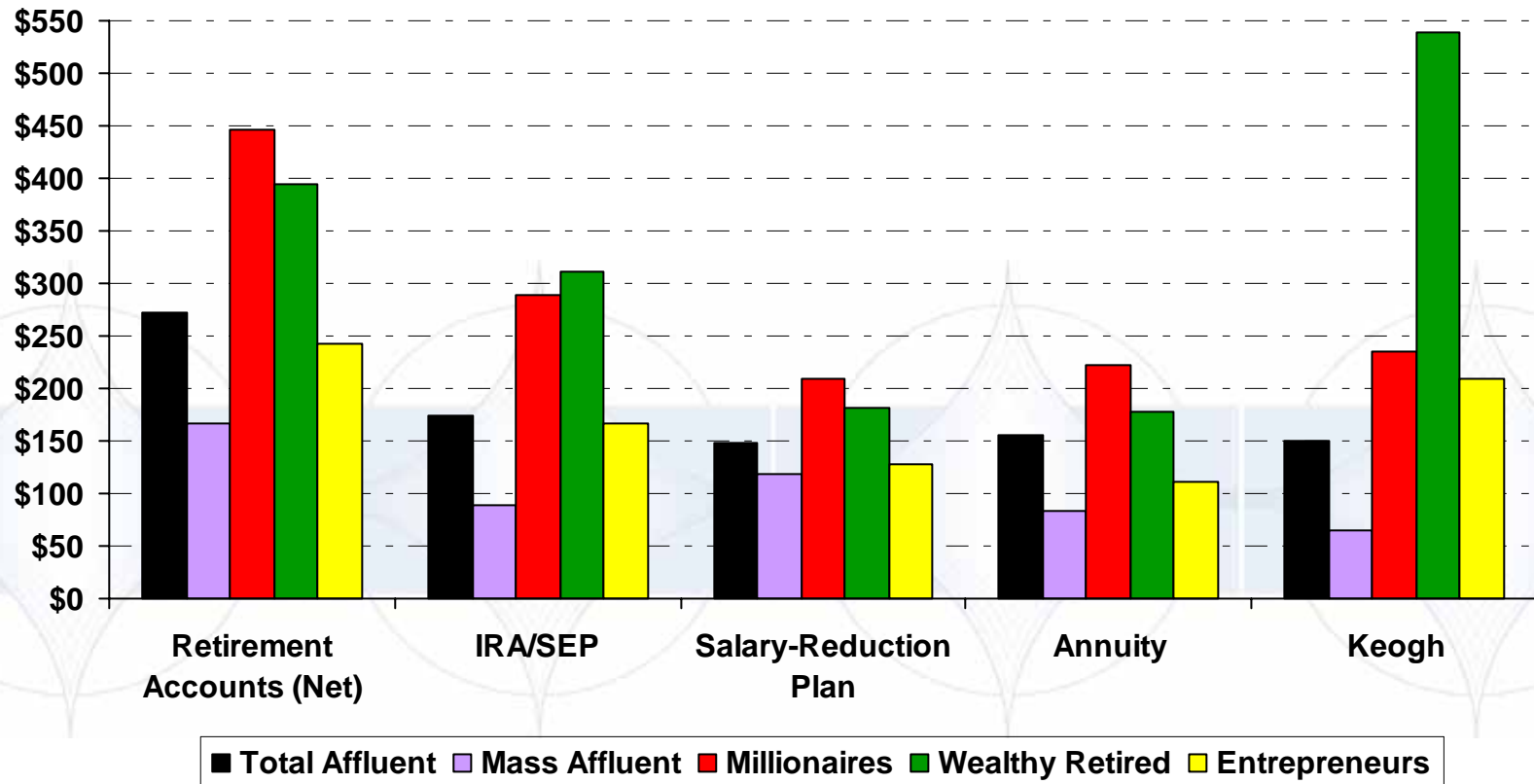


Table F-4 : Ownership of retirement products (Summary)  
 Base: All U.S. Households  
 Questionnaire Section F

# Mean Amounts Held in Retirement Accounts (\$000s)



Tables F-BAL, F-4h, F-6g, F-7d, F-5: Mean amounts held in retirement accounts (pension not included) (\$000s) (missing value substitution applied)

Base: Own Type Of Retirement Account

Questionnaire Pages F-4, Qs. 4h, 5: F-6, Q. 6g: F-8, Q. 7d

Source: The 2006-07 MacroMonitor



# Household's Financial Confidence (percent of households)

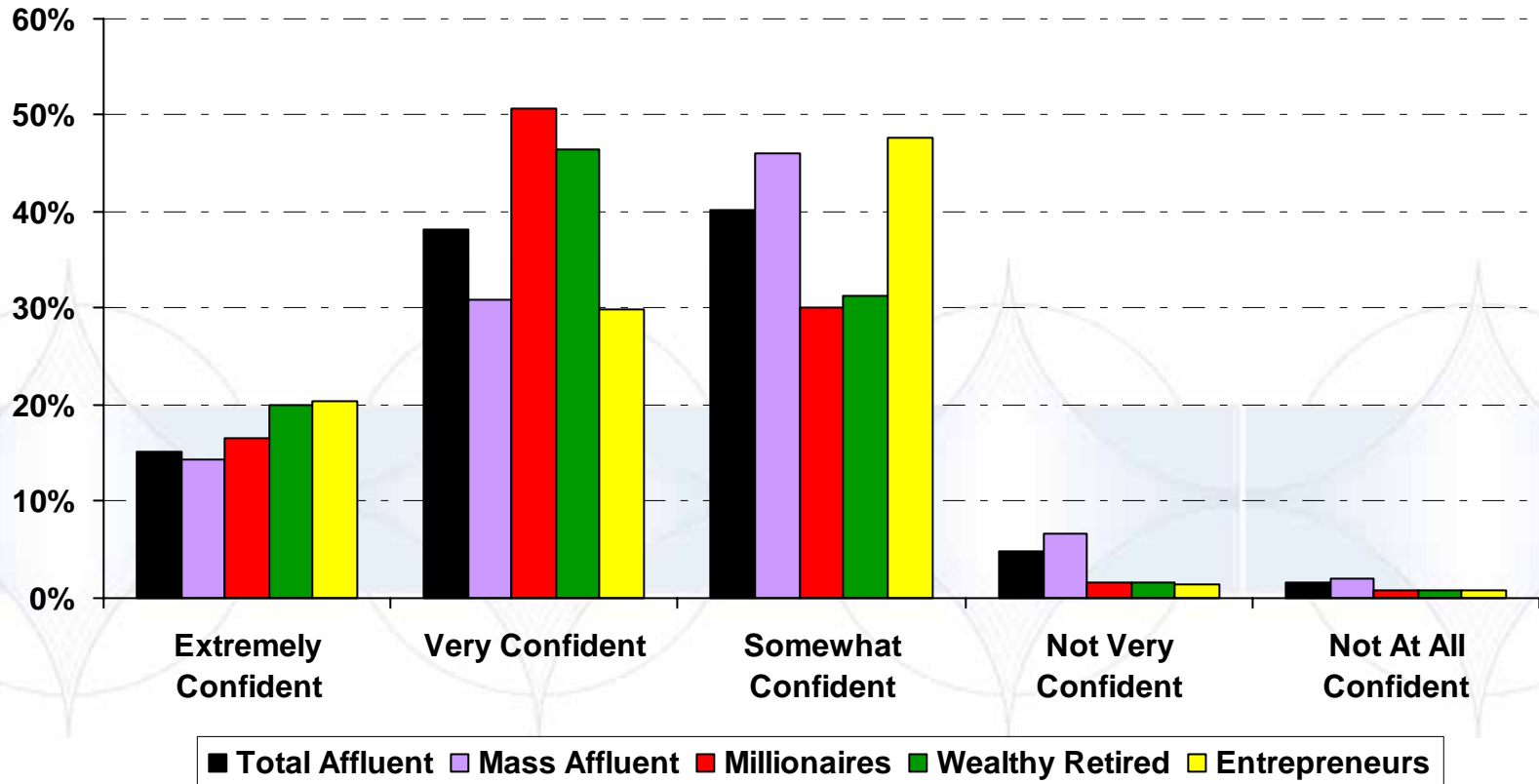


Table N-2 : Household's financial confidence  
 Base: All U.S. Households  
 Questionnaire Page N-1, Q.2

# How Household Would Use Unexpected \$25,000 (percent of households)

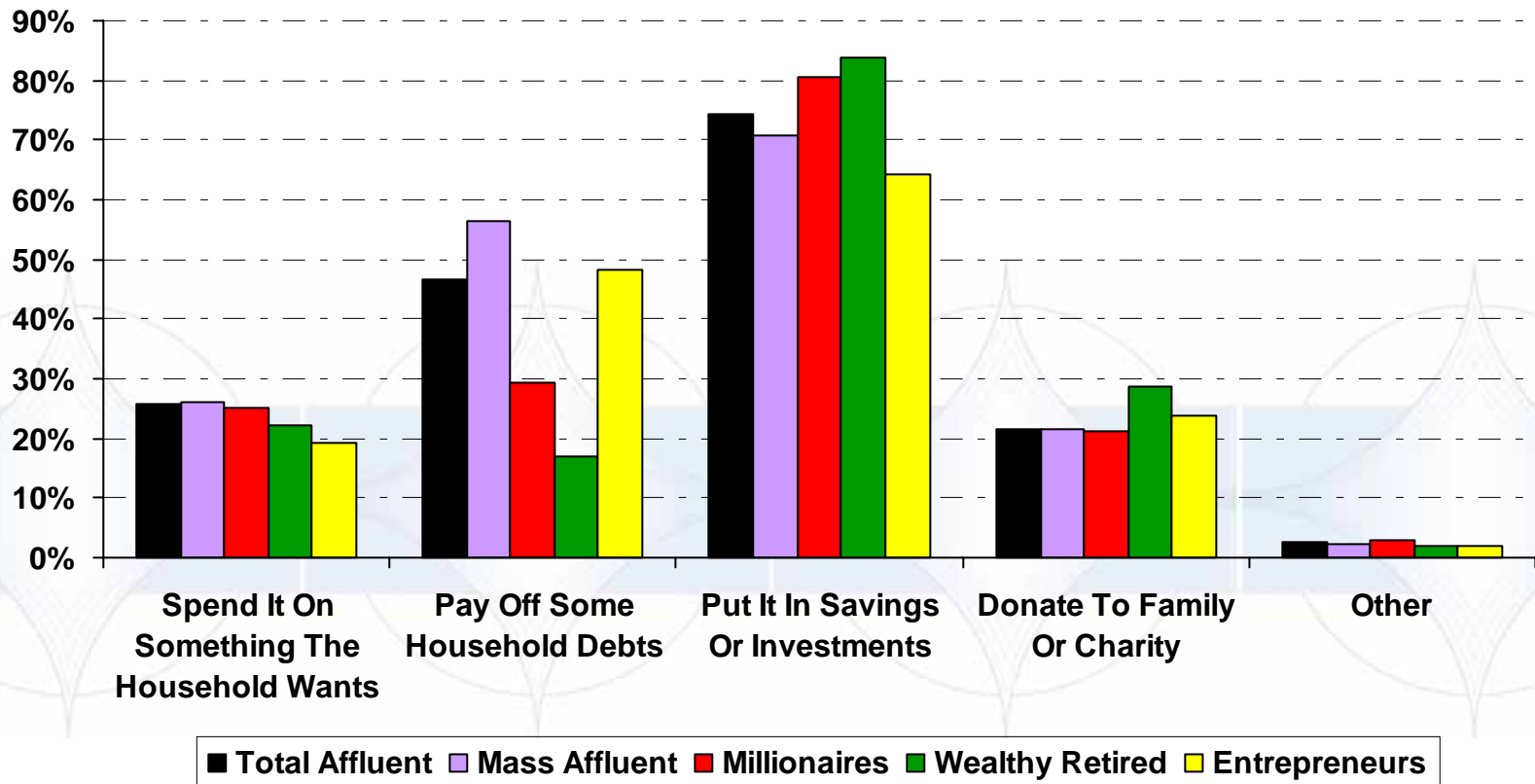


Table B-1a : Uses for unexpected \$25,000  
Base: All U.S. Households  
Questionnaire Page B-1, Q.1a

# For more information:

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