

Model Instance Name:

Investor

MID: New Measure - DOT will fill in

Date: 9/28/2012



Welcome and Thank You Text

Directions:

This welcome text is shown at the top of the questionnaire window and the thank you text at the bottom. This is a good place to mention the site/company/agency name so the visitor knows whom they are taking the survey for. Feel free to modify the standard Welcome and Thank you text shown in the boxes below. Please read comments before using any of the text.

Welcome Text

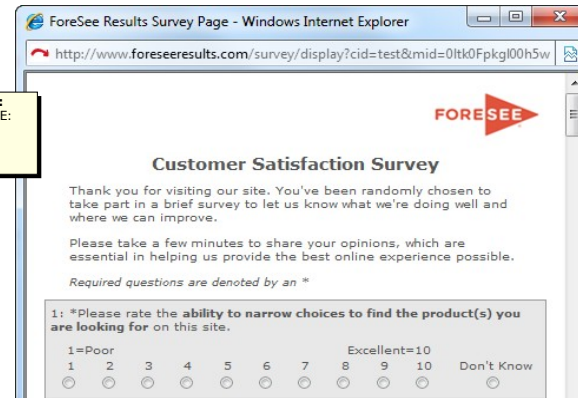
Thank you for visiting Investor.gov. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.

Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.

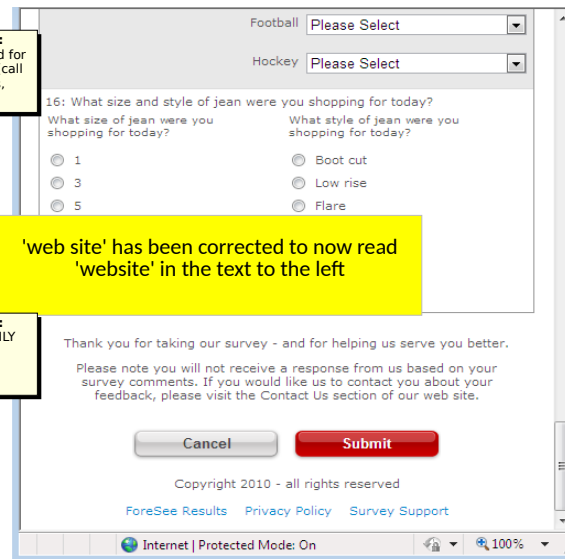
bharati.hulbanni:
if STORES MEASURE:
do NOT use any
welcome text.

Examples

Welcome Text Example



Thank You Text Example



DEFAULT Thank You Text

"Thank you for taking our survey - and for helping us serve you better. We appreciate your input!"

bharati.hulbanni:
TY text can be used for
all measure types (call
center, web, stores,
mobile etc.)

'web site' has been corrected to now read
'website' in the text to the left

ALTERNATE WEB Thank You Text

bharati.hulbanni:
Use this TY text ONLY
for WEB

Thank you for taking our survey - and for helping us serve you better.
Please note you will not receive a response from us based on your survey comments. If you would like us to contact you about your feedback, please visit the Contact Us section of our web site.

Cancel

Submit

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[ForeSee Results](#) [Privacy Policy](#) [Survey Support](#)

Internet | Protected Mode: On

Model Instance Name:

Investor

MID:

New Measure - DOT will fill in

Partitioned (Y)

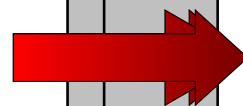
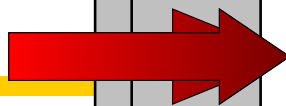
Date: 9/28/2012



Investor

Model questions utilize the ACSI methodology to determine scores and impacts

ELEMENTS (drivers of satisfaction)		CUSTOMER SATISFACTION		FUTURE BEHAVIORS	
MQ Label		MQ Label		MQ Label	
	Content (1=Poor, 10=Excellent, Don't Know)		Satisfaction		Recommend (1=Very Unlikely, 10=Very Likely)
1	Content - Accuracy Please rate your perception of the accuracy of information on this site.	17	Satisfaction - Overall What is your overall satisfaction with this site? (1=Very Dissatisfied, 10=Very Satisfied)	20	Recommend How likely are you to recommend this site to someone else ?
2	Content - Quality Please rate the quality of information on this site.	18	Satisfaction - Expectations How well does this site meet your expectations ? (1=Falls Short, 10=Exceeds)		Return (1=Very Unlikely, 10=Very Likely)
3	Content - Freshness Please rate the freshness of content on this site.	19	Satisfaction - Ideal How does this site compare to your idea of an ideal website ? (1=Not Very Close, 10=Very Close)	21	Return How likely are you to return to this site ?
	Functionality (1=Poor, 10=Excellent, Don't Know)				Seek More Information (1=Very Unlikely, 10=Very Likely)
4	Functionality - Usefulness Please rate the usefulness of the website tools provided on this site.			22	Seek More Information How likely are you to seek out more information about investment professionals and potential investments as a result of visiting this site?
5	Functionality - Convenient Please rate the convenient placement of the website tools on this site.				
6	Functionality - Variety Please rate the variety of website tools on this site.				
7	Look and Feel - Appeal Please rate the visual appeal of this site.				
8	Look and Feel - Balance Please rate the balance of graphics and text on this site.				
9	Look and Feel - Readability Please rate the readability of the pages on this site.				
	Navigation (1=Poor, 10=Excellent, Don't Know)				
10	Navigation - Organized Please rate how well the site is organized .				
11	Navigation - Options Please rate the options available for navigating this site.				
12	Navigation - Layout Please rate how well the site layout helps you find what you are looking for .				
13	Navigation - Clicks Please rate the number of clicks to get where you want on this site.				
	Site Performance (1=Poor, 10=Excellent, Don't Know)				
14	Site Performance - Loading Please rate how quickly pages load on this site.				
15	Site Performance - Consistency Please rate the consistency of speed from page to page on this site.				
16	Site Performance - Errors Please rate the ability to load pages without getting error messages on this site.				



Investor CUSTOM QUESTION LIST										
QID	Skip Logic Label	Question Text	AnswerIDs (DOT)	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	Special Instructions	CQ Label
		How frequently do you visit this site?		This is my first visit Daily Weekly Monthly Every few months Once every six months or less often		Radio button, one-up vertical	Single	Y		Visit Frequency
		Which category best describes you?		Individual Investor Financial Advisor or Investment/Securities Professional Student Teacher/Academic Attorney		Radio button, one-up vertical	Single	Y	Skip Logic Group*	Role

bharati.hulbanni:
Hide (DO NOT DELETE)
this column before
sending to a client.

bharati.hulbanni:
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this column before
sending to a client.

Holiday 2010 Custom Question Setup

YOU MUST KEEP THE CQ LABELS AS THEY ARE LABELED B

red & strike-through: DELETE
 underlined & italicized: RE-ORDER
 pink: ADDITION
 blue + -->: REWORDING

CUSTOM QUESTION LIST

QID (Group ID)	Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	
Generic "spend" intention for benchmarking and to compare to 2008, 2009 and 2010		Do you expect to spend more or less online during the 2010 holiday season compared to 2009?	A lot more			Single	Y	
Spend intention with this retailer		Do you expect to spend more or less online during the 2010 holiday season with <i>retailer.com</i> compared to 2009?	Please use the following guidelines: - DO NOT MODIFY THE WORDING of the ANSWER CHOICES - DO NOT ADD ANSWER CHOICES OR DELETE ANSWER CHOICES - DO NOT CHANGE ORDER OF ANSWER CHOICES, if you would like answer choice order changed, please request randomization - DO NOT change the CQ LABELS - You may change your company name in the question which is highlighted in BLUE					Y
			A little more	R				
			I expect to spend about the same amount as last year					
			A little less	S				
			A lot less	S				
		Not sure						
	R	Why do you expect to spend more online with <i>retailer.com</i> this holiday season? (please select all that apply)	Promotions (\$ or % off offers)		Checkbox, one-up vertical	Multi	Y	
			Quality of merchandise					
			Merchandise selection					
			Good return policy					
			Online product prices					
			Shipping costs					
			Availability of merchandise					
			Better personal economic circumstances this year					
			Other (please specify):	Z				



Special Instructions

Skip Logic Group

Skip Logic Group

Holiday 2011 Custom Question Setup
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red & strike through: DELETE
 underline & bold: RE-ORDER
 pink: ADDITION
 blue + -> REWORDING

CUSTOM QUESTION LIST										
QID	Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	Special Instructions	CQ Label	Application Notes
		Do you expect to spend more or less online during the 2011 holiday season compared to 2010?	A lot more A little more I expect to spend about the same amount as last year A little less A lot less Not sure		Drop down, select one	Single	Y		H2011-Spend general	Benchmarking question fro 2008, should be a part of all Holiday questions
		Do you expect to spend more or less online during the 2011 holiday season with retailer.com compared to 2010?	I don't purchase anything from retailer.com last year A lot more A little more I expect to spend about the same amount as last year A little less A lot less Not sure		Drop down, select one	Single	Y	Skip Logic Group	H2011-Spend retailer	Added in 2009, relates directly to the retailer and should be a part of the holiday battery
	A	Why do you expect to spend more online with retailer.com this holiday season? (please select all that apply)	Promotions (\$ or % off offers) Quality of merchandise Merchandise selection Good return policy Online product prices Shipping costs Availability of merchandise Better personal economic circumstances this year Other (please specify)		Checkbox, one-up vertical	Multi	Y	Skip Logic Group Randomize	H2011-Spend more	
	B	Other reason to spend more online			Text area, no char limit		N	Anchor Answer Choice	H2011-Spend more other	
	B	Why do you expect to spend less online with retailer.com this holiday season? (please select all that apply)	Promotions were not appealing (\$ or % off offers) Quality of merchandise Poor merchandise selection Return policy I'm trying to save more and spend less Online product prices Shipping costs Poor availability of merchandise Worse personal economic circumstances this year Other (please specify)		Checkbox, one-up vertical	Multi	Y	Skip Logic Group Randomize	H2011-Spend less	
	B	Other reason to spend less online			Text area, no char limit		N	Anchor Answer Choice	H2011-Spend less other	
		Please tell us what you did on retailer.com today.	I made a purchase for myself today I bought a gift for someone else today I was browsing today to purchase online later I was browsing today to purchase at one of the store locations I was browsing today to see what you have Other (please specify)		Radio button, one-up vertical	Single	Y	Skip Logic Group Randomize	H2011-task accomp	Only ask if you do not have a "What did you do?" question. Do not replace what you have you will lose trending.
	A	What else did you do on retailer.com today?	Yes No		Text area, no char limit Radio button, one-up vertical	Single	N Y	Anchor Answer Choice Skip Logic Group	H2011-task accomp other H2011-access mobile	Should be used if retailer has a mobile app
	A	Did you access (insert retailer's name here) mobile website or mobile shopping app while holiday shopping this year?	No To compare different products To look up price information about a product To look up product specifications To view product reviews To make a purchase To find a store location Another reason		Checkbox, one-up vertical	Multi-select	Y	Skip Logic Group Randomize	H2011-why access mobile	
	B	Please specify the other reason you accessed the company's website or app from a mobile device.	Another reason		Text area, no char limit		N	Anchor Answer Choice	H2011-access other	
		Have you ever used a mobile device to retailer's website, mobile website, or mobile shopping app while holiday shopping this year?	Yes		Radio button, one-up vertical	Single	Y		H2011-mobile any	Should be asked of all regardless if they have a mobile device app or not. It is a global question getting a read on visitors.
	AA	Which of the following ways did you use device this holiday season? (please select all that apply)	Research and buy online, have product delivered Research and buy online, pick up in store Research in a catalog and call to order Research online, call to order Research in a catalog and buy online Research online, buy in store Research in store, buy online Research and buy in store None of the above		1-up vertical	Multi	Y	Skip Logic Group Exclusive Answer Choice	H2011-mobile use H2011-mobile use store	Global use of mobile app, can be asked of all
	A	How did you use your mobile device while holiday season? (please select all that apply)	I accessed a competitor's website I accessed a shopping comparison website (Shoopzilla.com, Shopping.com) I accessed the store's mobile shopping app I accessed a competitor's mobile shopping app None of the above		1-up vertical	Multi	Y	Exclusive Answer Choice	H2011-mobile use store	
		Please think about your shopping preferences. In general, which of the following is your preferred way to shop for the type of product you researched or purchased today?	Research and buy online, have product delivered Research and buy online, pick up in store Research in a catalog and call to order Research online, call to order Research in a catalog and buy online Research online, buy in store Research in store, buy online Research and buy in store None of the above		Radio button, one-up vertical	Single	Y	Randomize	H2011-shop preference	Should be a part of the Holiday battery of questions. Gets at shopping preference and will be left on after January.

Please use the following guidelines:
 - DO NOT MODIFY THE WORDING OF THE ANSWER CHOICES
 - DO NOT ADD ANSWER CHOICES OR DELETE ANSWER CHOICES
 - DO NOT CHANGE ORDER OF ANSWER CHOICES, if you would like answer choice order changed, please request randomization
 - DO NOT change the CQ LABELS
 - You may change your company name in the question which is highlighted in BLUE

Festive Season 2011 Custom Question Setup
 YOU MUST KEEP THE CQ LABELS AS THEY ARE LABELED BE

red & strike through: DELETE
 underline & bold: RE-ORDER
 red: ADDITION
 blue & ->: REWORDING

CUSTOM QUESTION LIST

QID	Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	Special Instructions	CQ Label	Application Notes
		Do you expect to spend more or less online during the 2011 festive season compared to 2010?	A lot more A little more I expect to spend about the same amount as last year A little less A lot less Not sure		Drop down, select one	Single	Y		H2011-Spend general	Benchmarking question from 2008, should be a part of all Holiday questions
		Do you expect to spend more or less online during the festive season with retailer.co.uk ?	Please use the following guidelines FOR A UK survey: - DO NOT MODIFY THE WORDING OF THE ANSWER CHOICES - DO NOT ADD ANSWER CHOICES OR DELETE ANSWER CHOICES - DO NOT CHANGE ORDER OF ANSWER CHOICES, if you would like answer choice order changed, please request randomization - DO NOT change the CQ LABELS You may change your company name in the question which is highlighted in BLUE		Drop down, select one	Single	Y	Skip Logic Group	H2011-Spend retailer	Added in 2009, relates directly to the retailer and should be a part of the holiday battery
A		Why do you expect to spend more or less online during the festive season? (please select all that apply)	Availability of merchandise Better personal circumstances this year Other (please specify):		Text area, one-up vertical	Multi	Y	Skip Logic Group Randomize	H2011-Spend more	
U		Other reason to spend more online			Text area, no char limit	Multi	N	Anchor Answer Choice	H2011-Spend more other	
B		Why do you expect to spend less online during the festive season? (please select all that apply)	Promotions were not appealing (e.g. % off offers) Quality of merchandise Poor merchandise selection Return policy I'm trying to save more and spend less Online product prices Shipping costs Poor availability of merchandise Worse personal economic circumstances this year Other (please specify):		Checkbox, one-up vertical	Multi	Y	Skip Logic Group Randomize	H2011-Spend less H2011-Spend less other	
		Other reason to spend less online			Text area, no char limit	Multi	N	Anchor Answer Choice	H2011-Spend less other	
		Please tell us what you did on retailer.co.uk today.	I made a purchase for myself today I bought a gift for someone else today I was browsing today to purchase online later I was browsing today to purchase at one of the store locations I was browsing today to see what you have Other (please specify):		Radio button, one-up vertical	Single	Y	Skip Logic Group Randomize	H2011-task accomp	Only ask if you do not have a "What did you do?" question. Do not replace what you have you will lose trending.
A		What else did you do on retailer.co.uk today?			Text area, no char limit	Single	N	Anchor Answer Choice	H2011-task accomp other	
		Did you access (insert retailer's name here) mobile website, or mobile shopping app while Christmas shopping this year?	Yes No		Radio button, one-up vertical	Single	Y	Skip Logic Group	H2011-access mobile	Should be used if retailer has a mobile app
A		Why did you do so? (please select all that apply)	To compare different products To look up price information about a product To look up product specifications To view product reviews To make a purchase To find a store location Another reason:		Checkbox, one-up vertical	Multi	Y	Skip Logic Group Randomize	H2011-why access mobile	
B		Please specify the other reason you accessed the company's website or app from a mobile device:			Text area, no char limit	Multi	N	Anchor Answer Choice	H2011-access other	
		Have you ever used a mobile device to access any retailer's website, mobile website, or mobile shopping app?	Yes No, and I don't plan to No, but I might in the future Not sure		Radio button, one-up vertical	Single	Y	Skip Logic Group	H2011-mobile any	Should be asked of all regardless if they have a mobile device app or not. It is a global question getting a read on visitors.
AA		Which of the following ways did you use your mobile device during the festive season? (please select all that apply)	I used my mobile device to access the internet to research products (compare product details, look up prices, find store locations, etc.) I made purchases online from my mobile device I used my mobile device to compare products or prices whilst shopping in person in a store I used retailer-developed mobile shopping apps None of the above		Checkbox, one-up vertical	Multi	Y	Skip Logic Group	H2011-mobile use	Global use of mobile app, can be asked of all
A		How did you use your mobile device while in retail stores during the festive season? (please select all that apply)	I accessed the store's website I accessed a competitor's website I accessed a shopping comparison website (e.g. Shopzilla.co.uk, Shopping.com UK) I accessed the store's mobile shopping app I accessed a competitor's mobile shopping app None of the above		Checkbox, one-up vertical	Multi	Y	Exclusive Answer Choice Skip Logic Group	H2011-mobile use store	
		Please think about your shopping preferences. In general, which of the following is your preferred way to shop for the type of product you researched or purchased today?	Research and buy online, have product delivered Research and buy online, pick up in store Research online, call to order Research catalogue buy online Research online, buy in store Research in store, buy online Research and buy in store None of the above		Radio button, one-up vertical	Single	Y	Randomize	H2011-shop preference	Should be a part of the Holiday battery of questions. Gets at shopping preference and will be left on after January.
						Exclusive Answer Choice		Anchor Answer Choice		