

12 Quick Tips for SHOPALONG SUCCESS

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I recently completed a major shopalong study for a new client and was reminded how a successful shopalong study relies on so many factors beyond the researcher's expertise in recruiting, designing the right questions and activities, listening, and observing. These studies involve many additional logistical details that we have to manage well, especially because we may not have the support of a facility and other personnel resources to help us in situ. The following are 12 tips for making the shopalong experience more successful. Perhaps you'll find some of these obvious, others you may not have thought about...but you should, before you undertake a shopalong study.



“It will save an enormous amount of time if you organize, label, download, and disseminate all media before the next day’s shopalongs. Note the name of your respondents and stores visited, label, and download photos and recordings to your computer, and email audio recordings to transcription.”

BEFORE SHOPPING:

1 Get permission if at all possible.

There are two basic kinds of shop-along situations: those in which the store management gives permission to proceed with research, and those in which we enter at our own risk and try to conduct the research without raising suspicion of store personnel. Obviously, it’s best if the research is known and aboveboard.

Because your client is more likely to have leverage through their sales account team, ask them to secure permission. Assure your client and store managers that the research will not impede other shoppers, and that images of store personnel will not be recorded. Secure a letter that you can carry with you in case questions arise; also obtain approval from whoever manages the local stores you will be visiting. Allow several weeks in the schedule for this approval process. If entering stores without prior approval, be prepared to abort your interview at any moment and gracefully leave the store.

2 Include photos of respondents on grid

Finding your shopalong respondent in a crowded store or pre-meeting place can be a time-consuming challenge, but there are some easy steps that can mitigate problems. Ask the recruiter to include a cell phone number and a photo of your shopalong respondent right on the grid so you can scan people as they walk by. Make it easier for the respondents also by having the recruiter give them your cell phone number. I sometimes wear a QRCA nametag, too. The less time wasted in finding each other, the more time for your interview.

3 Design considerations: pre-shop, during shop, post-shop

My favorite shopalong design includes three components. The pre-shop ideally takes place in a nearby coffee shop or similar setting, which you must identify ahead of time and confirm its proximity to the store you will be visiting. Buy something and let the counter staff know you will be in and out all day doing research and that you are not stalking the place. When you spot your respondent, sit down and have a beverage, make your basic intros. Let the shopper know the purpose of the research and whether store personnel are aware of this activity. Pay the incentive, have the respondent sign your NDA/permission to record document, then review homework, if that is part of your design. Asking for some type of homework (e.g. bring a picture of pets or kids) makes it easier to identify your respondent quickly. Before you end this phase of the interview, take a snapshot of your respondent to put into your report. Ensure your recorder is working correctly and your batteries are fully charged.

The next phase of the interview is the shopalong. Ideally, the store is just a short walk from your meeting place. The bulk of your time together inside the store will be spent walking, talking, observing, and listening.

The post-shop time is a great opportunity to connect with your respondent in a different way, to reflect on what she/he observed or learned, perhaps even to provide a creative exercise, and offer any final comments. Do this in a quiet corner of the store that you visited or return to the pre-shop locale. Before the next interview, check the quality of your recording, and switch to a back-up device, if needed.

4 Dress rehearsal, including clothing and shoes

If you are conducting shopalongs all day long, plan ahead on what to wear and carry. You might be walking miles, so comfortable shoes are a must. Plan your clothing, too, as attire impacts your comfort and recording effectiveness. I use a small digital audio recorder that slips into the pocket of a shirt or jean jacket. I actually do a quick dress rehearsal (walking and talking) to test out the sound quality and make sure there is no distracting noise from rustling fabric.

DURING SHOPALONG:

5 Meeting place

As noted in Tip 3, finding a good meeting place takes planning. Your recruiter should have enough local knowledge to suggest the right spot. But don’t just rely on that; double-check. In this last study, I was directed to a little bakery café across the street from the store. It was perfect ...until 3 p.m. when they closed. Good thing I had my afternoon and evening meeting places identified.

6 Build rapport with shoppers, clients, and, if possible, store managers

As in any kind of research, the first few minutes are essential for building rapport and trust. Make your shopper an ally by sharing selected details about the objectives of the study. If a client is joining you, confirm that he/she understands the “ground rules” as well as your expectations regarding assistance and involvement in the interview. If you have the store manager’s permission to be on site, introduce yourself before the first interview and perhaps share a few observations at the end of the day.

7 Travel light
Is your shoppalong taking you to a big box store or a small boutique? The actual size of the retail environment will have an impact on what to carry and who should accompany you beyond your shopper. My advice is to travel light so that you are not schlepping a lot of material, a briefcase, laptop, etc. I sling a small purse over my shoulder, place the audio recorder in one shirt pocket, my smartphone in another, and carry a small notebook and pen in hand. Extra batteries, pens and a microphone are in my purse. (I carry an extra audio recorder in my briefcase in the car.)

My discussion guide is attached to the notebook, but I rarely look at it beyond the first interview. I prefer to internalize the guide, making sure I cover all the key topics, but adapting to the energy of the respondent and the situation. I don't take tons of notes, just key points and times of interesting things, which I might want to include in the report. Details are in the audio transcripts.

Traveling light also means thinking through who will accompany you. At most, the respondent and I will be accompanied by one client and a videographer—certainly no more than four of us walking through the aisles of a store—but often it's just the respondent and me.

8 Make a small footprint
Related to traveling light is being as inconspicuous as possible during the shoppalong, whether it is being conducted with store permission or in stealth. It's imperative that we not impede other shoppers or store personnel. I discuss that with the respondent in the first few minutes of our meeting.

9 Digital audio recorder
I personally use a very small digital recorder (Olympus VN-722PC). It's four inches tall and about one-and-a-half inches wide, weighs just a few ounces, and has excellent clarity and tremendous capacity. With both MP3 and WMA formats, it's compatible with Mac and PC. I plug it into my laptop, download the recordings, and send them to my transcriptionist at the end of each day. I carry a tiny exterior microphone as well, but I rarely find need for it.



10 Video pros and cons: photos a must
A movie of a respondent walking down an aisle and pondering a selection or capturing store signage, lighting, poorly stocked shelves, or a crowded environment tells a more vivid story than one captured in words. But there are considerations to having a videographer beyond the added cost for recording and editing. If your research is being done “under the radar,” it's impossible to walk through the aisles with an obviously professional camera in hand, but you might be able to get away with some very discrete little video movies from your smartphone. Remember not to capture faces or recordings of anyone other than your shopper whom you have permission to record.

In my most recent study, we had a good compromise with the videographer joining for one full day of shoppalongs and generating several excellent clips for the report. These movies, coupled with audio snippets and lots of photos from my smartphone, made the shoppers and retail experience feel present in my report.

11 Bring cash to spend in store
In addition to the respondent's “official” incentive, I like to give shoppers an extra \$10 cash to spend in the stores we visit. That unexpected gift adds a little extra excitement to the experience; the shopper is encouraged to try something new, and it's a nice “thank you” to the retailer who

allowed us to conduct research there.

POST SHOPALONG:

12 Organize, download, and label recordings and photos as soon as possible

You've spent a great day in shoppalongs walking through stores with several respondents, collecting a lot of material. It will save an enormous amount of time if you organize, label, download, and disseminate all media before the next day's shoppalongs. Note the name of your respondents and stores visited, label, and download photos and recordings to your computer, and email audio recordings to transcription. Back up everything on a flash drive before you erase recordings and pictures from devices. And you may want to run a highlighter through your notebook to review your key observations, insights, and ideas.

13 The baker's dozen: improvise
My final tip is to be flexible in your discussion design and in your attitudes. Respondents can get lost and show up late. That raging thunderstorm makes the short walk from greeting place to store a drag. The store you visit has loud blaring music and misbehaving kids. A store manager asks you to stop taking pictures or leave...all of these things happen. Go with the flow; improvise when you need to and enjoy the learning! 📺