



Your Guide to Unmoderated Retail and Shopping Research

Complete with best practices and templates, this tactical guide shows you how to approach your next retail research project with confidence and ease.

Understanding customer experiences while shopping—or even their general brand sentiments—is a powerful way to gain insight for your company’s positioning and growth. Setting up the studies, on the other hand, can be filled with pitfalls that make the study far less effective than it could be.

In this guide, we walk you through what questions retail brands can answer with unmoderated user studies, the specific benefits of remote research, and best practices to make your participant experience as effective as possible.

Lastly, we’ll also provide you with several template examples for how you could conduct your own studies. This information is especially helpful to anyone using dscout’s platform, but the knowledge applies regardless of which tools you decide to use.

Let’s dive in!

Why should retail brands conduct research?

Answer questions about the shopper experience

In-the-wild studies capture shopping context and in-the-moment purchase decision factors. This kind of research can answer a variety of questions that may improve the overall shopper experience, such as:

- Are shoppers able to find what they're looking for?
- Do they end up buying items they didn't plan to buy?
- What influences and motivates those decisions?
- What research do they do before heading to the store?
- Is the store website helpful?
- Do they use the brand's app while shopping? Why or why not?

Take a keen look at competitors

Scouts can outline the competitive landscape for our clients, and clients can see firsthand from scouts which brands or companies they rely on or prefer shopping at, and why.

Some of the questions your team can answer include:

- What are certain brands or companies doing that make them a top-choice for scouts to shop at?
- What are these factors, and why are these important for scouts?
- What are certain brands or companies lacking?
- What can these brands or companies change to improve the scout's shopping experience?

Understand what resonates

Explore relationships to your brand. Recruit a mix of acceptors and rejectors (or even brand-unaware shoppers) to understand what inspires shoppers and what turns them away. Whether it's in the store, online, or out in the world, let scouts show and tell you why they can't get enough of—or avoid enough of—a specific brand.

Consider looking for answers to questions like:

- What efforts are resonating?
- Is it a feature of a product, an easy-to-use site, commitment to sustainability that hooks people?

Collect the resource inventory participants rely on when they find brands to use or avoid. You can also use this as an opportunity to introduce concept sketches, or present new messaging to ask for unfiltered, qualitative feedback.

How remote research is particularly beneficial

Mimic real-world situations

One of the best ways to get valuable insights is to set the stage for ecological validity. This study design mimics real-world situations as much as possible, as opposed to moderated studies that may feel contrived and unrealistic.

Following participants [on their shopping journey](#) remotely allows brands to see their customers “in the wild.” A real shopping trip with a real customer will result in more actionable and accurate findings than a simulated experience with someone outside the target market. [Unmoderated methods](#) also preserve ecological validity further, reducing the moderator’s influence on the participant’s journey.

Although you will still be prompting participants to go through certain scenarios, doing so with an unmoderated approach in a real-world setting will get as close to the real deal as possible.

Capture in-the-moment context with media questions

Unmoderated, [remote research](#) allows researchers to “follow” participants as they experience a shopping moment. If you ask the right media question prompts, you can see what participants are seeing and how they feel about it in real time through pictures or videos.

This allows researchers to hear from their own customers and learn directly about what their customers experience. As omnichannel shopping blurs the divide between physical and online stores, remote research also allows you to more accurately tell a variety of customer stories.

Best practices for shopping and retail research

Consider the benefits and risks of video responses

Think carefully about limiting the time a participant spends in a store or department. Some research activities may attract uncomfortable or harmful attention from staff, especially if participants are asked to visit a store without making a purchase. This can disproportionately impact people of color.

Ask yourself: if video is important to your stakeholders, can participants record right before or after their time inside the store? When possible, allow participants to choose video in store or a written alternative. You might still receive many video responses.

Whether in-store video is required or optional, also consider how to reduce awkwardness. For example, if asking for a video of a specific department or display, offer guidance like, “Imagine you’re on a video call with your best friend and want to show them this display. Talk about how it’s helpful, or if it leaves you with any questions.”

Don't rely on "would you?" but rather "have you?" to find your participants and assess shopping behaviors. When participants are in store, limit open ended questions as much as possible!

Facilitate more natural behavior

Consider allowing more natural behavior at the beginning of a study—give yourself room to be surprised by themes. If your brand comes up naturally, great! If not, what can you learn from comparisons? After observing natural behavior, hone in on brand-specific questions.

Clarify language

After drafting your question script, check for any brand- or industry-specific wording that might not be clear to all participants. When in doubt, add a quick definition of your terms to set up for success. When participants are self-guiding, definitions can reduce self-doubt.

Over communicate for the best results

When fielding and managing [unmoderated studies](#), we cannot emphasize enough the importance of over communicating. Over communicating can and does help set participants up for success as they participate in-store shop-along missions.

This means adding clear and digestible instructions for participants, especially what type of media outputs you want to see from them while they're in store. For example, that may be something like, "Three photos from the frozen foods aisle and a video of you picking which frozen food to purchase."

Use checkpoint questions to guide them throughout the research study. Be clear on when scouts should be in-store to complete questions (and if they should be in a specific aisle to complete the questions). Also be clear when scouts can leave the store.

It's okay to repeat yourself throughout the mission instructions and checkpoints! We recommend it so that we're minimizing the number of chances for scouts to incorrectly complete an activity. This genuinely sets them up for success the first time they engage with the questions and activity.

Review participant responses as they come through and help coach or guide them, if necessary, before the deadline approaches. Even though this is unmoderated, remember to still utilize communication channels to communicate with your participants.

That includes...

- Sending them reminders of upcoming deadlines
- Giving them encouragement and compliments
- Coaching them through the research study if they need the extra guidance

Accommodate busy schedules

Give participants enough time to make an in-store trip during their busy schedules. This usually means giving them at least five days to complete a study, and those five days should include one full weekend. For example: Instead of running a research study from Monday-Friday, run it from Wednesday-Sunday so participants can get a weekend to complete the study. This helps people who work during the weekdays.

Set up rewards accordingly

When setting up the reward, make sure you're compensating scouts accordingly for what you're asking them to do.

For example: you'll want to compensate scouts knowing that they need to drive to a specific store, make a purchase, and record their in-store experiences. Take into account the logistical aspects of your research study when setting the reward for your participants.

Lastly, even if a purchase isn't technically required for the study, consider padding the incentive. For example, you can say something like, "While no purchase is necessary, the reward for this study includes \$10 toward the cost of a purchase (in case you'd like to buy anything while you're in the store)."

Retail research examples with rough templates

Template 1: Shopalong in the wild

Conduct an iterative study to assess store layout before and after changes. [Mobile, media-rich surveys](#) will help you capture the [real-time shopping experience](#).

Introductory questions

Before participants go on their shopping trip, have them answer questions about previous shopping experience and current behaviors relating to the brand.

Questions like...

- Have you made a purchase from this store in the past 12 months?
- What did you buy?
- Why did you buy it?
- How often do you browse or research online before heading in-store?
- Tell us about a recent in-store experience that was positive. What made it positive?
- Tell us about a recent in-store experience that was negative. What made it negative?

Shopalong

Have participants take you with them to their store visit. Be sure to prepare them for what they'll be expected to do during the visit, and when to start answering your questions.

- First impressions of store
- What they expect from specific sections
- Navigation to specific sections [video]
- Challenge rating of navigation
- Did specific sections meet expectations?
- Fitting room/try-on experience [photo]
- Purchase experience [photo]

Reflection

- Highs and lows
- What they'd change
- Overall satisfaction

Template 2: Shopalong experiences evaluating competitors

Ask participants to compare their shopalong experiences at your store versus competitors' through unmoderated/evaluative research. See where your store ranks compared to others, and the why behind it.

Recruitment criteria

You're looking for participants who recently adopted a dog in the last six months, went in-person shopping for their dog in at least two stores (and one of the two stores is yours) in the last six months, and is currently in the market for purchasing a new dog bed.

Introduction

- Get to know the participants and the dog they adopted
- Get to know what types of items they've shopped for in the past six months, and where they've purchased them
- Learn about their favorite or most preferred pet store to purchase dog items, and why

In-person shopalong

Entry 1 - Ask participants to share their shopalong journey as they go to their preferred pet store to shop for a dog bed.

- Ask about the inventory
- Ask about the prices
- Ask about the store atmosphere/environment itself

Entry 2 - Ask participants to share their shopalong journey as they go to your pet store to shop for a dog bed.

- Ask about the inventory
- Ask about prices
- Ask about the store atmosphere/environment itself

Reflection

Compare experiences shopping at their preferred store versus your pet store.

- If they had to choose one store to shop at for dog beds, which one would they ultimately choose? Why?
- What did they like and dislike about their shopalong journeys?
- What could the pet stores do to improve the participant's shopalong experience?

Template 3: In-home user test of a new or revamped product

Intro

Explore what experiences (if any) a participant has with the brand through an unmoderated study. Participants answer these questions while waiting to receive the product.

Unboxing

What are their first impressions of this product?

Regular check-ins

Ask participants to show how and where they use the product. If possible, allow for natural use. For example: "Show us each time you use this product. If you don't use it in a given week during this study, check in to tell us why." This gives you an opportunity to capture delights and pain points during natural use.

Reflection and co-creation

Ask participants to get creative! For example, sketch out how they would change the product if they were in charge of the brand.

Template 4: Brand attitudes and affiliation

Intro

Suss out the top questions people ask when considering a brand. What information feels most helpful and why?

Moments-based resource inventory

Ask participants to show where they turn to when researching products or brands over the course of roughly one week.

- Did they naturally mention your brand? Did they go with a competitor?
- Follow along in real time, or ask for an “inventory” that could include selfie videos, screen recordings, or photos.
- What resources are people turning to?
- Is their research independent, online, with any friends or family?

Brand identity

Ask participants to reflect on their research from the week, and share one brand that stands out.

- What makes the brand special?
- How does it compare to others?

To wrap up, introduce your brand. Ask participants to write an informal mission statement (in their own words), and their likeliness to shop. Include a [stakeholder question](#) as well. For example, “Does new messaging around sustainability resonate?”

Wrapping it up

Whether you are trying to understand brand sentiment, the competitive landscape, or in-the-wild shopping experiences for customers, [well-designed unmoderated studies](#) can bring in a wealth of information to later [synthesize and act](#) upon.

Do you have your own experiences around retail research, or questions you’d like to ask fellow peers? Check out [People Nerds’ Slack community](#) to continue the discussion!

**Better understand the needs of your customers,
see how you compare to competitors, and discover
potential new markets with dscout.**

Speak with a member of our team to see our product in action and learn more about how we support other human-centered organizations.

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