

What is the Retail Forward ShopperScape™?

The Retail Forward ShopperScape™ is a unique source of information about consumer shopping behavior today.

The Retail Forward ShopperScape™ has been fielded since November 2003 to a sample of 4,000 consumers each month. The survey has 3 major components:

- Questions that track how consumers are feeling about the economy and their household financial situation, which form the basis of the ShopperScape™ Future Spending Index.
- Questions that track shopping behavior at over **250** individual retailers/retail sectors and for over **100** product categories across all retail sectors.
- Questions that change monthly are used exclusively for the RFIS program.

This unique survey design allows users to:

- Track changes over time in terms of where primary shoppers in households shop and what they buy where they shop
- Assess competition and how they fare against competition
- Determine profiles of their shoppers and competitors' shoppers
- Compare your most loyal customers to your general customers
- Examine cross-shopping behaviors in terms of channels, individual retailers and categories
- Find out why shoppers buy where they buy

We know you'll find ShopperScape™ data useful. Just as important, the methodology behind the monthly ShopperScape™ survey can be trusted.

- The Retail Forward ShopperScape™ survey is administered through TNS NFO's online household panel – ShopperScape™ is *not* administered via pop-up ads as are some other surveys out there today.
- Data is weighted by key Census demographic characteristics to be representative of the total U.S. population although because the sample is pulled to be representative a minimal amount of weighting is needed.
- Survey respondents are the self-designated "primary shoppers" in their households (responsible for at least half of the household's shopping).
- Additional TNS NFO panel member information is merged with ShopperScape™ survey data to provide even richer insight into who shoppers are.

What are the details of the TNS NFO Interactive Panel?

Name of the Sample Source: TNS NFO MySurvey Community.

History of the Sample Source:

TNS NFO began active recruitment of an online panel in 1996. The TNS NFO MySurvey Community is a pre-recruited and profiled panel of over one million households and nearly 3 million individuals. TNS NFO has the capability to balance samples to be online representative or Census representative, as well as many other definable targeted universes. The TNS NFO MySurvey Community is a true panel, and is managed; it is not an opt-in list. TNS NFO maintains a substantial inventory of panel households to quickly generate both representative and targeted samples.

What are the Profile elements? Please describe the philosophy/strategy for keeping information up-to-date? Any plans for additional selection options?

TNS NFO maintains over 70 different standard data points for online panelists. These data points may be classified into geographic, demographic, and ownership (including technology) variables. These profile elements include information on up to seven individuals within the household.

The MySurvey website gives panelists the opportunity to update pertinent personal or household information and demographics at any time. In addition to panelist initiated updates, panel data points are updated on an annual basis at a minimum to ensure the integrity of our data.

In addition, large segments of the panel have also been screened on detailed employment and net worth information.

Please describe Ethnic selection availability:

TNS NFO can access panelists who are Hispanic, African American, Asian, or Native American. TNS NFO has developed a strong network of ethnic recruiting partners and has a sizeable number of ethnic panelists. Please note, online ethnic populations may not be as representative of the ethnic population at large due to the current dynamic of the interactive space. As such, panel ethnic populations may be slightly skewed. However, dependent upon sample size, Census representative samples may be generated.

Please describe your Recruiting philosophy/strategy:

TNS NFO's recruitment philosophy and strategy has evolved over the years as our interactive panel has grown from 10,000 households to over 1 million households and as Internet advertising techniques have developed.

Based on our varied and rich recruitment experience, TNS NFO has determined that recruitment for our online panel must include diverse sources, utilize a variety of techniques, and employ targeted, customized recruitment offers for long-term success. This approach ensures that TNS NFO does not rely on one single partner or method to supply its panel. Due to the rapid evolution of the Internet, TNS NFO has learned that recruitment techniques must

evolve quickly in order to remain in the forefront of panel companies. In addition, TNS NFO has established a continuous, targeted recruitment program with its current 20+ recruitment partners to ensure that the panel has an adequate, on-going supply of respondents. These partners include several of the largest portals, specialized web communities, web aggregators, and Internet advertising firms. These partnerships provide TNS NFO with access to over 15,000 Internet web sites for recruitment and, correspondingly, provide access to very specialized and targeted communities.

The key to successful recruitment is ensuring that panelists are satisfied with their panel/survey experience. To do this TNS NFO accurately promotes the benefits of the panel experience and provides our panelists with easy access to NFO Panelist Support representatives to address questions or concerns. TNS NFO also utilizes our panelists to help us recruit new members through a panelist referral program.

To support our interactive recruitment efforts, TNS NFO has designed and built our own proprietary recruitment information system and process that allows continuous monitoring of recruitment rates by individual source, rapidly registers new panelists, cleans and validates new respondents, and determines the new member's willingness to cooperate in the survey process. This approach has evolved and been refined in the last six years as an integral part of the MySurvey portal and TNS NFO panelist database. The recruitment platform and approach has been instrumental in TNS NFO's panel growth and success in the interactive research environment.

Please describe your Panel Management philosophy:

Drawing upon over 50 years of panel management experience, TNS NFO's panel management philosophy is closely tied with our recruiting philosophy and is a union of our extensive experience with both the mail and interactive panels. Regular cycles of recruiting and purging are imperative in maintaining competitive return rates and providing consistent demographics within the panel. TNS NFO has developed a continuous panel build system that is supported by our usage policies. The usage policies prevent spikes in panelist drop off by evaluating the total number of surveys received, the length of time between contacts, and subject category exposure. Maintaining panelist rapport through a versatile rewards/incentive program and regular panelists communications has always been a critical component of our successful panel management philosophy. TNS NFO launched its new rewards program in 2001 which is a point-based system that allows panelists to earn points for taking surveys. Panelists can later redeem these points for cash, prizes, or charity donations. TNS NFO was the first research company to introduce this innovative approach.

What is your typical Participation rate? (i.e. # panelists invited to a survey ÷ # panelists who answered at least 1 survey in a recent 3 mo time period) :

In order to maintain a highly efficient panel, response/participation rates are monitored for each study fielded. Typically, response rates are estimated at 46% for all studies with a recommended survey length of 15 minutes or less, given appropriate participation incentives are present. If study specifics require a survey longer than 15 minutes, response and completion rates will drop slightly.

Any limits on # of times panelists can be surveyed?

TNS NFO has a stringent set of panel policies that control usage. The variables considered in developing these policies are not only maximum frequency of contact but also minimum frequency of contact (very applicable to the Internet), methodologies employed, and category content. On average, TNS NFO does not contact panelists with full surveys more than twice per month.

Please describe U.S. National Representative sample options (also any validation you may have):

TNS NFO uses the Current Population Survey from the U.S. Census Bureau, updated annually, to determine the profile of a U.S. representative sample on key demographics (age, income, household size, geo-region).

The TNS NFO online panel is balanced to the online population as determined by a quarterly omnibus survey of 75,000 U.S. representative TNS NFO mail panel households.

TNS NFO routinely balances online samples to U.S. Census Quotas. Quotas are sent with each study if different than the standard representative definition.

Source: TNS NFO