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EGUIDE | BRAND TRACKING

10 Things to Know When Planning Your Next Brand Tracker

If you're blindly trusting your brand tracking study, you might want to take a closer look at your data.

Many brand trackers are susceptible to sample bias where survey respondents may not represent your target audience and where inaccurate data from unintentional mistakes or misleading information can skew the results.

Trust Dynata

When you use Dynata's direct audience data to track your brand's performance, you can be assured the data comes right from the source – no mismatches, no fake survey respondents, just pure, reliable information about your brand.

What is a tracker, anyway?

Tracking studies or ‘trackers’ measure changes in consumer sentiment and behavior over time. This is what distinguishes them from any other type of research. A tracker can be repeated at any time interval: hourly, daily, weekly, monthly, annually, or intermittently.

Tracking studies are unique in their ability to measure changes across time to your brand, product, business or environment. A well-planned, well-designed, and properly-executed tracker can deliver insights not available by any other means.

Dynata supports thousands of trackers across the globe. Some are multi-year, multimillion dollar investments for the company sponsoring them, and many interview tens-of-thousands of people across multiple countries.

The importance of trackers and the weight of the business decisions they support makes it critically important to get every planning and execution detail right. This means starting with the right target audiences who can deliver valuable data to drive insights unlike any other research vehicle.

The multiple purposes of trackers

A well-designed, well-executed tracker can:

- Help businesses understand the competitive environment
- Assist in market-sizing
- Alert the business to potential problems
- Guide a response to events that could impact the brand
- Measure media and ad effectiveness
- Gauge the impact of marketing efforts over time
- Provide early warning about shifts in the market
- Measure demographic, geographic, behavioral, psychographic and attitudinal changes in the target market
- Identify and test new opportunities

When to update your tracker

Since trackers are used to measure change over time, the goal is typically to change nothing about the study itself once it has launched, so that any changes to the data can be attributed to real market changes. However, modifications to the study are sometimes needed to keep up with:

- The way consumers communicate
- A changing privacy landscape
- Emerging methods and techniques
- Changes to the business or business environment
- Behavioral shifts brought about by technology

These needed changes must be carefully planned, tested and implemented.

Plan ahead! Decisions, decisions…

Trackers represent a significant investment of time and money, so it makes sense to allow for a significant planning period before launching the first wave to minimize any changes post-launch.

As with any project, start by asking some questions for clarification:

- Why are we doing this project?
- What problem or question is being addressed?
- What decision are we trying to make?
- What do we need to know about customers? The market? The brand? Advertising?
- What data do we need to have to answer the question?
- How will the data be used? What action will be taken?
- Who is the primary beneficiary of the data?
- What is the budget?
- How will we assess the ROI of the tracker and who will do this?
- What things are likely to change in the tracker's lifetime?

Know the source of your data.

Too often, trackers are set up without full visibility into the audiences providing the supporting data, resulting in haphazard sample selection and skewed findings.

Here are ways to simplify your respondent selection to reduce headaches down the road:

- Keep recruitment simple — match strategy to your audience
- Tailor engagement methods to each group
- Use tools that group respondents by recruitment and engagement type
- Pick panels for strategy and fit, not individual panel details
- Optimize sampling for faster, more consistent, repeatable results

Also, verify data quality by asking your first-party panel provider:

- How they identify and filter out fraud and disengaged respondents
- What percentage of their sample requires post-survey cleaning
- How they mitigate biases when selecting respondents for removal

Ten things to consider when executing your next

1. Frequency

Decide whether the tracker will run quarterly, monthly, annually, etc. The answer will depend on how often the “things” or the factors you are measuring are likely to change, the budget, and how the data will be acted on. The right solution might be a hybrid approach: a quarterly or semi-annual tracker in combination with a smaller “pulse” tracker in-between which measures only a few key metrics.

2. Duration

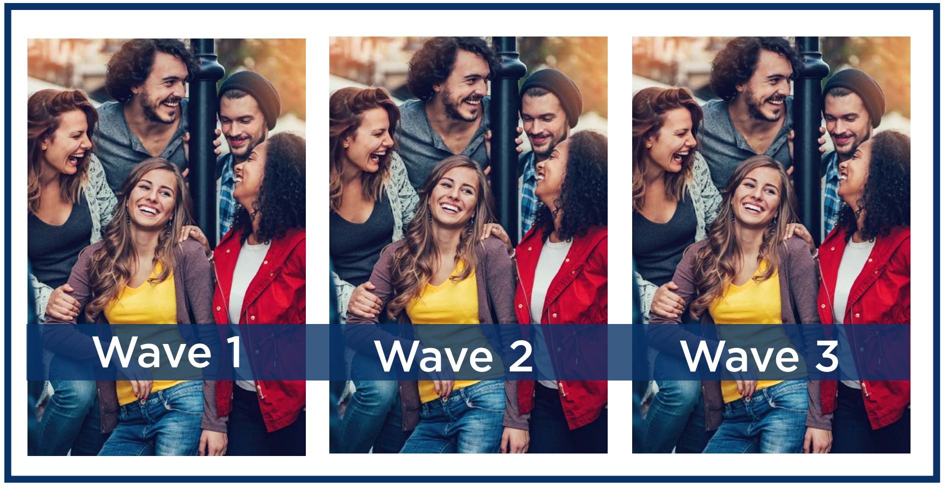
Will the tracker last a few weeks, or is it likely to collect over years, or over a decade, or more? If the latter is true, more attention needs to be paid to likely changes in technology, demographics and other market forces and how the tracker will adapt to them.

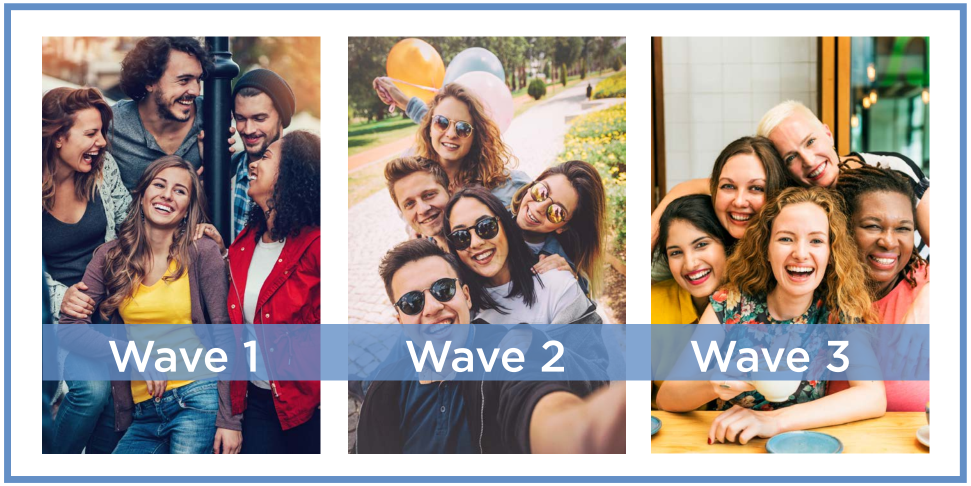
3. Repeat Contact

Will you repeatedly contact the same group of people for each wave (this is known as a longitudinal tracker), or look to hear from different people each time? If you are "re-contacting" the same people, it is important to understand the realities of re-contact rates, and to have a plan for replenishment.

4. Resting Rules

If you are planning for different sample each time, can one individual take the survey more than once? If so, how often? Research conducted by Dynata showed that it is difficult to demonstrate "priming effect" (i.e. that people will answer differently in a subsequent survey when they have been exposed earlier to the same or similar questions). Long exclusion periods may not be beneficial.





5. Target Population

What is the target population, including its demographics, geography and other attributes? Is every group included within the target population relevant to the topic being studied? Are people being properly excluded who should not be part of the target?

6. Sample Size

A primary factor in this decision is how the data will be analyzed. If changes in sub-segments will be monitored and reported, the overall sample size must be large enough to produce reliable data for the sub-segment.

7. Sample Quotes

Will a sample plan deliver enough people in the key groups you want to analyze? Conversely, are quotas being used that do not make sense for the target population?

8. Contact Method

Trackers can be conducted in-person, by mail, via telephone, with a live interviewer, online, or through a combination of these methodologies. The choice depends on availability of the target audience for each mode, your budget, what type of information will be collected, and the time available to complete the study.

9. Gathering Data

Some trackers gather data continuously, others only field in the first week of the quarter, for example. This decision impacts feasibility. A longer field time or continuous data collection approach work best for hard to reach populations.

10. Communicating Results

Finally, it is important that the research services provider know how you would like the data delivered, or how to set up a dashboard to provide direct access to results.

Setting up a tracker

The essential elements of any tracker are feasibility, sustainability and consistency. The sample source is critical to delivering on all three. An unpredictable or diminishing sample supply causes headaches because it means that changes must be made to the tracker midstream, for example, by supplementing from a different sample supplier. Changing tracker sample sourcing can be complex, costly, and time-consuming, usually requiring parallel testing and recalibrating results.

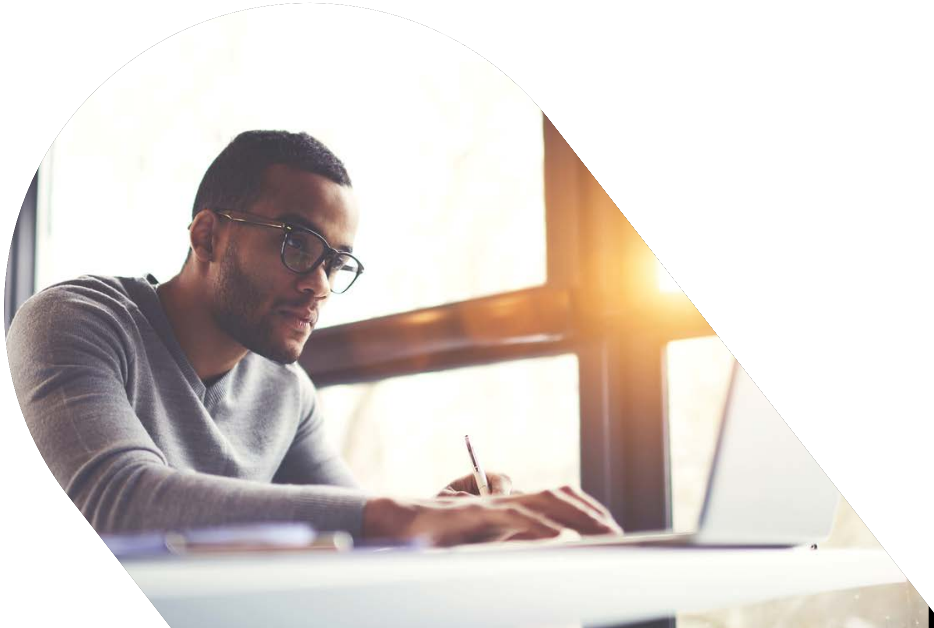
It is not enough to be feasible for the initial waves – your sample provider must be able to sustain your tracker long-term as the market and business environments change. It is vital to work with a vender who has enough reach and scale to deliver a consistent sample throughout the tracker's life.

Future-proof your tracker

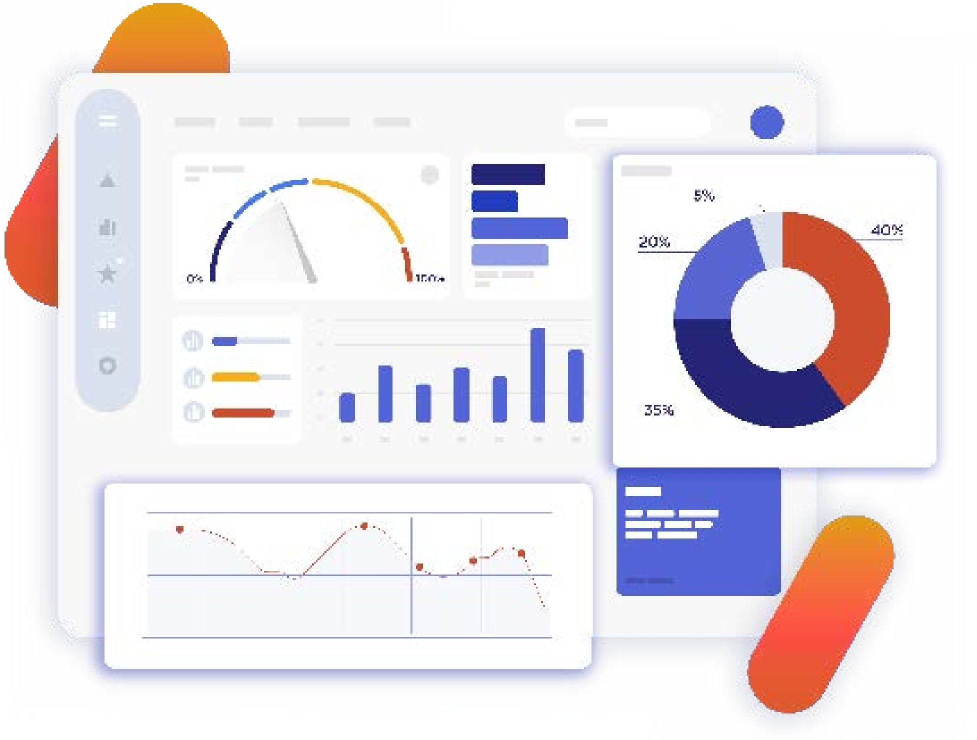
A stable sample frame is essential for tracker consistency, so the best sample provider uses not just one recruitment source type, but multiple different channels with a multitude of different sources within each channel to future-proof the consistency of your sample frame even as online behaviors and technologies change over time.

With access to a huge inventory of sample, you can be confident there will be enough consistent sample to support your tracker even if:

- Market share shrinks causing lower incidence
- Target populations shift and quota definitions change
- Your business enters new markets and launches new products and services



Time to show off your work.



You put a lot of effort into setting up your tracking study—now spot trends faster and tell a more compelling story with tools and visuals that make your great work consumable and engaging for stakeholders.

Consider these factors when configuring your dashboard:

- Understand the reporting needs of key stakeholders
- Determine which data is most critical to surface
- Decide KPIs and the type of analysis you plan to conduct
- Identify a timeline for setting up your dashboard
- Ensure wave data populates dynamically

One final consideration—decide if you prefer a hands-on solution or if you'd rather outsource management to a third party. The DIY option gives you more control but requires more setup time, while the outsourced option may cost more up front but frees you up to focus on other tasks.

Questions:

What to ask your research services provider

- Will my project be feasible throughout its expected lifetime? If not, how will this affect the long-term health of the tracker? Could quotas be loosened so the same person could take the survey again after a wave or two? Could pre-recruiting be arranged?
- Can your organization provide the range of services I need?
  - Questionnaire consultation, design, and programming
  - Sampling plan
  - Reporting: Dashboard, full report, PowerPoint slides or more
  - Global sample and questionnaire localization
  - Additional data to append to the completed interviews
- How will you, as a vendor, maintain consistency?
- How will your team work with my team? Periodic review? Reporting? Availability outside regular working hours?
- What is your experience with this type of tracker? Do you have knowledge of the vertical?
- Can you advise on a sample plan and the appropriate quotas to use?

Summary

While most of these are considerations for any research project, they are even more crucial in a tracker because making changes after the first wave launches can be costly and time-consuming, often requiring testing to isolate the impact of the study change compared to the market changes being measured by the tracker. Each factor listed above has options, with tradeoffs of cost, practicality and methodological rigor. You should discuss these options with your research services provider, who should be able to provide guidance on each aspect of your tracker planning and preparation.

Need more guidance?

Contact a Dynata research professional a free consultation at **info@dynata.com** or visit **www.dynata.com.**

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