



EGUIDE | SAMPLING PROTOCOLS

Sampling done right

Discover how our sampling expertise ensures survey reliability and projectability while reaching your target respondents.



Survey research offers a powerful glimpse into the preferences, behaviors, and mindsets of your target respondents. Leveraging these findings paves the way toward a lasting competitive advantage. But the insights gained from surveys are only as good as the methods used to obtain them. This is why a sound sampling protocol is so important.

What makes for a strong sampling protocol?

Whether surveying panel respondents across several continents or microtargeting an elusive niche group, Dynata always strives for three essential characteristics in our sampling protocols:

Reliability

Ensuring the survey research is accurate, complete, and error-free so users can trust the quality of the data and the insights they inspire.

Repeatability

Adopting a consistent methodology so the same protocol can be run at any time and still yield similar results.

Projectability

Extrapolating the research from the sample and scaling it to the greater target population, allowing findings to be put to their maximum use.

This guide focuses on the first two of these characteristics – reliability and repeatability. Achieving these crucial elements has grown increasingly difficult across the industry, but **Dynata offers an innovative array of tools and approaches** to address these challenges.



Why an increasingly complex research industry demands advanced approaches

Sampling is a critical method by which companies align their need for feedback from a specific target audience with the ability to find and survey these people. With this power, however, has come a rising complexity, on both sides of the sampling protocol: sourcing and targeting.

Sourcing Complexity

Dynata alone manages 3,100 permutations of panel brands and countries. In just the United States, Dynata has 29 different and separate Open and Loyalty panels. Globally, Dynata has 82 countries each with their own panels, and each of our panels has on average more than 200 profile variables per panelist.

While this robust variety is beneficial for serving a range of research needs, determining which of these permutations to use presents challenges to researchers. Deciding between these sourcing options, and keeping track of the specific dynamics inherent to each choice, can be an overwhelming task.

Targeting Complexity

The targeting side of sampling protocols is also rife with complexity. Defining quotas and target characteristics entails choosing among some 2,500 attributes and 94,000 selection criteria. What's more, these choices are constantly evolving as we add and remove panels, countries, and attributes to stay current with evolving market conditions.

These rising complexities pose threats to the reliability and repeatability of survey research. To bring order to chaos, and ensure superb quality through elegant simplicity, Dynata has built a systematized approach.

Source channel: Simplifying panel selection

The challenge

With so many strategies and tactics to recruit, engage, and incentivize survey respondents – from loyalty rewards to mobile SDKs – research managers face a dizzying array of options. Different demographics respond to different approaches, making it difficult to decide which panels to select for any given audience or study.

The solution

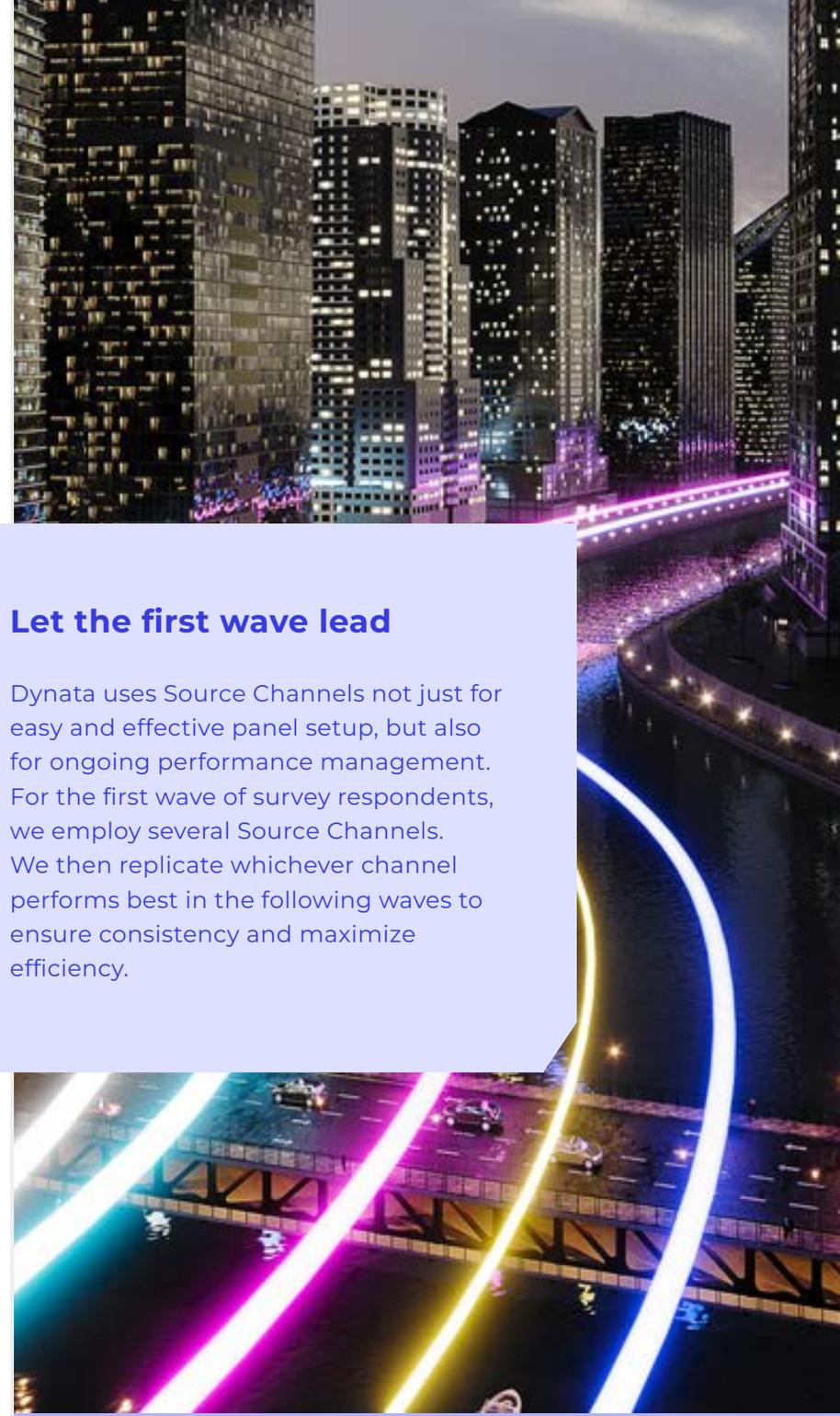
Dynata introduced Source Channels to simplify panel selection. Groups of respondents are now organized by engagement strategy. Instead of choosing individual panels based on a thorough knowledge of their underlying engagement mechanisms, users simply describe the type of recruitment and engagement strategy they want, and the desired options appear.

The benefit

Source Channels simplify sampling without sacrificing rigor. Users no longer need to delve into the depths of individual panels, but instead can focus on intent and audience fit. This drives faster, more consistent setups and improves the reliability and repeatability of research results across projects.

Let the first wave lead

Dynata uses Source Channels not just for easy and effective panel setup, but also for ongoing performance management. For the first wave of survey respondents, we employ several Source Channels. We then replicate whichever channel performs best in the following waves to ensure consistency and maximize efficiency.



Source selection for maximum applicability



The challenge

Across the 3,100 panel brand-and-country permutations from which Dynata's samples can be sourced, researchers often select or forgo options based on certain underlying criteria tied to broader research goals, such as whether an audience can be re-contacted for follow-on work. Selecting sources based on these additional considerations is often a haphazard rather than streamlined experience.



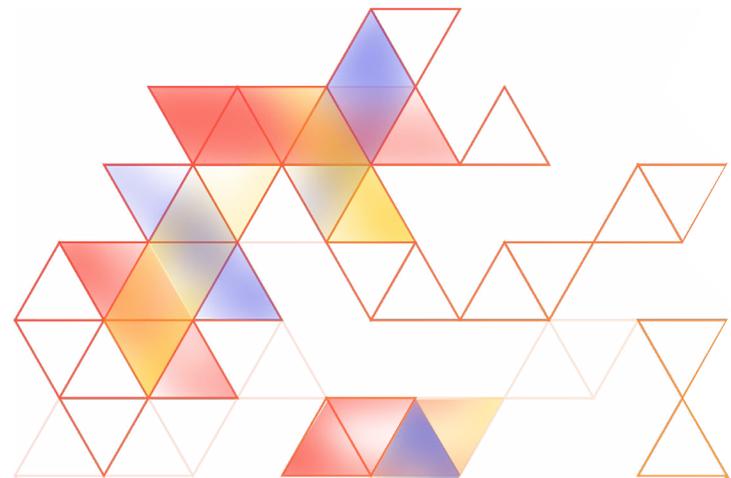
The solution

Dynata extracted and surfaced key criteria and characteristics to help researchers make informed selections that align with their broader goals. Wading through the details of a given source is now a thing of the past. Instead, panel sourcing accommodates requirements such as re-contactable audiences and desktop-only users.



The benefit

Setting up a sample with the precision needed for maximum applicability is simple and straightforward. No guesswork or manual filtering is required. Just tell the system your needs for the specific sample, and it will implement the exclusion and inclusion criteria so as to ensure your survey research is fit for your purpose.



Improved targeting with predefined libraries called Starting Universes

The challenge

Targeting an audience to suit the needs of a research project is essential for surfacing relevant findings. But starting with a set of 37,000 attributes makes the process onerous. Where to begin?

The solution

Dynata streamlined its 37,000 attributes and compressed them into a core library of the 2,500 most common. We then used this library to create a set of **Starting Universes**, which represent highly relevant combinations of attributes that characterize specific audience types. These Starting Universes are intentionally designed to remain fluid so they can evolve over time with shifting market dynamics. Users can also customize a given Starting Universe to their needs.

The benefit

Starting Universes make it easy to begin from the right place. A predefined array of popular audience groups allows you to start with a set of attributes that is as close as possible to what you need, while still affording the opportunity to customize from there. It's simplicity without any compromises when projects require additional nuance.



Case Study: The perks of a Starting Universe

Say your survey research project wants to target crypto investors. Beneath the surface, this category is made up of many attributes, such as people with investable assets, digitally savvy audiences, and financially active lifestyles. Selecting the Starting Universe of "Crypto Investors" jumps past the step of combining various attributes and instead selects the whole package of relevant underlying characteristics. These can then be tweaked, if needed, such as by layering on additional attributes.

Increased optionality for time in field



The challenge

Some research projects prioritize speed above all else, allowing for the introduction of bias that may result from, for example, only being able to reach audiences that are available during a particular time period. Other projects prefer to minimize bias even at the cost of speed – but still want to avoid overly extending the research while pursuing harder-to-reach audiences.



The solution

Dynata offers two different modes to accommodate these preferences, including a dynamic fielding mechanism that allows for bias-minimization without overly extending time in-field.

UNLIMITED MODE

- ▶ The more straightforward option
- ▶ Optimized for speed
- ▶ The total sample pool is available from the start

STANDARD MODE

- ▶ Optimized to limit survey bias
- ▶ The sample availability is dynamically distributed throughout the project
- ▶ Hourly adjustments to the protocol ensure that audiences are pursued without causing a bottleneck to the whole project



The benefit

The two modes accommodate multiple research preferences, both of which meet the threshold for repeatability and reliability. Maximum speed is available for those who need it, while minimal bias is on offer for those who can spend more time in-field.

Overcoming International differences through automated equivalences

The challenge

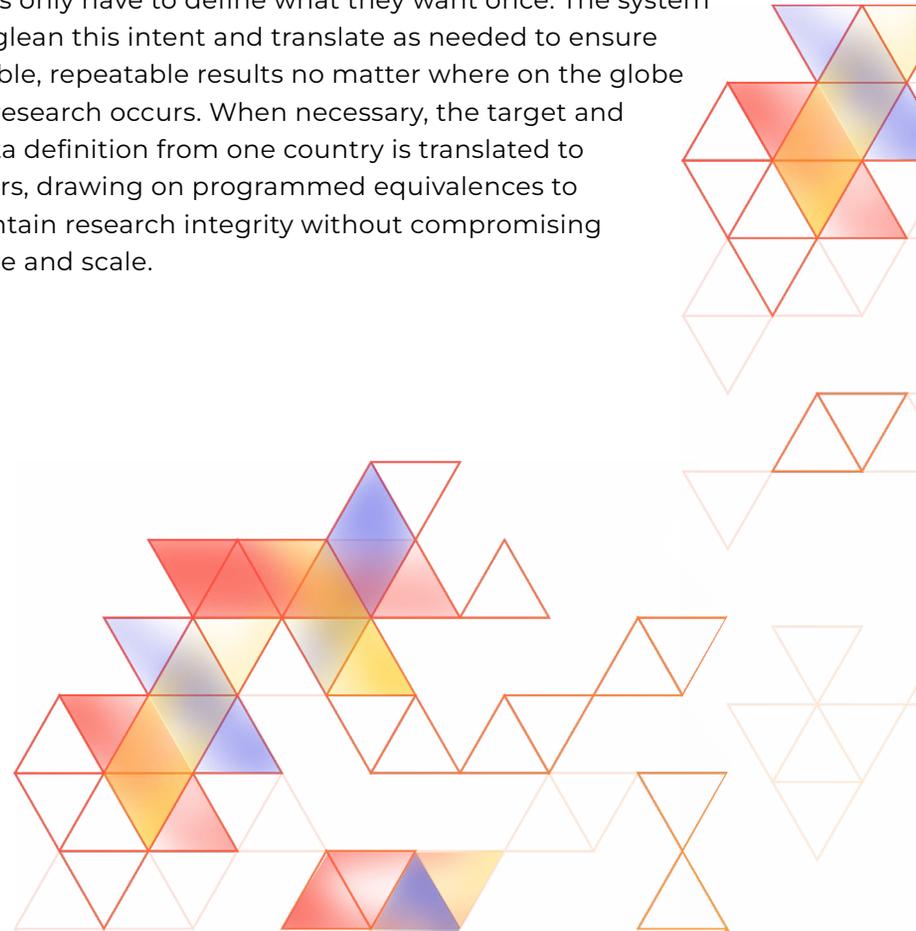
Leveraging Dynata's global scope allows for cutting-edge research on an International scale, but different countries don't always use the exact same criteria for defining targets. For example, one country's census might collect "annual income" while another might only gather data on "net monthly income".

The solution

Dynata's system automatically identifies and addresses inconsistencies across countries. When one characteristic is available in one country but lacks an exact match in another, a suitable equivalent is surfaced and brought to the user's attention.

The benefit

Users only have to define what they want once. The system will glean this intent and translate as needed to ensure reliable, repeatable results no matter where on the globe the research occurs. When necessary, the target and quota definition from one country is translated to others, drawing on programmed equivalences to maintain research integrity without compromising scope and scale.



Anticipate respondent shortfalls and take early action to prevent future errors

The challenge

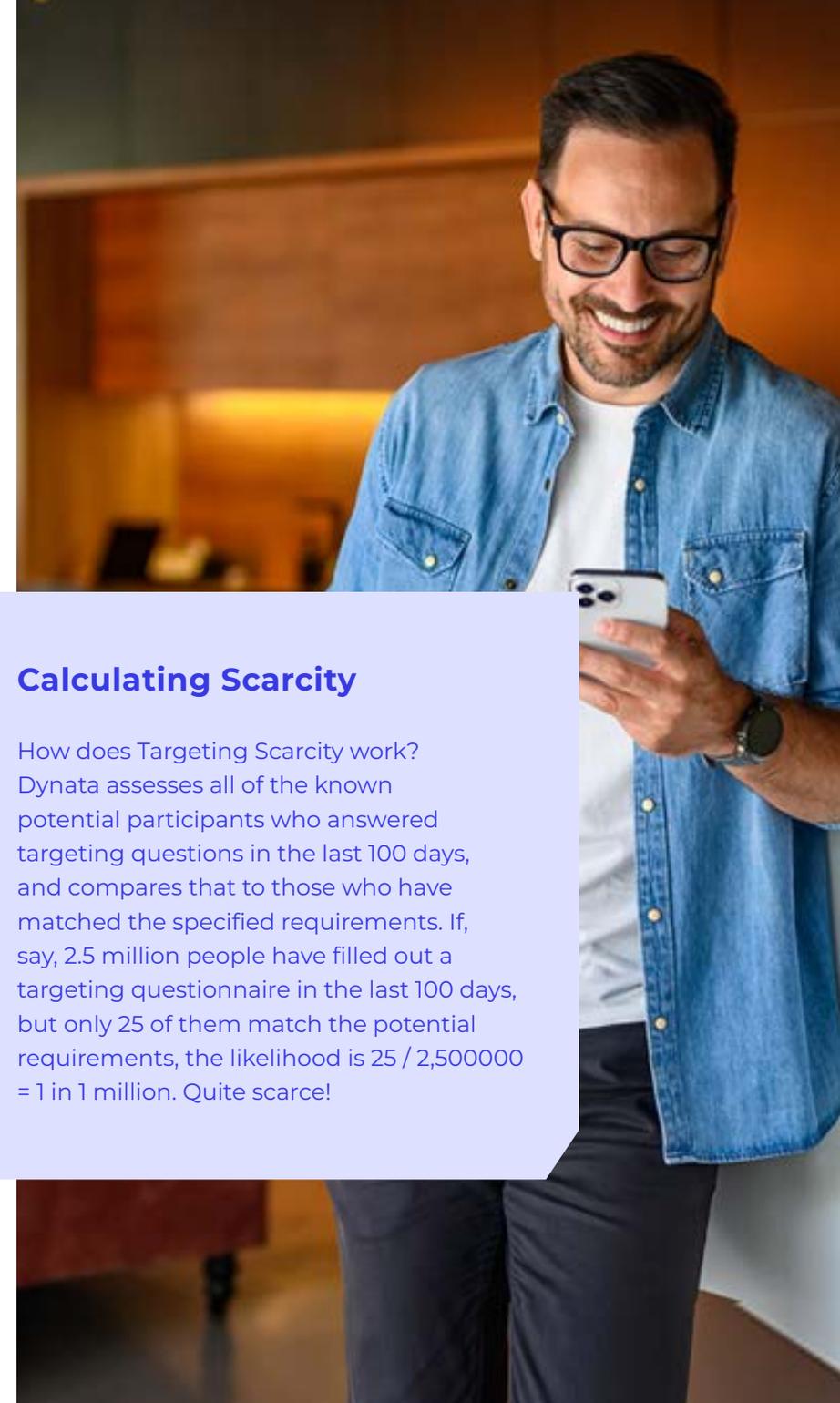
If your project has been running for five days and you begin to discover that the targeting and quota definitions you've used are likely to result in a shortfall, you must take quick action. This may, however, introduce mistakes into the research that compromise reliability and repeatability. The problem is that human intuition is not particularly good at discerning differences of magnitude between, say, .0001 and .000001, even though the former is 100x bigger!

The solution

Targeting Scarcity is a metric that provides a highly intuitive explanation of likelihood, presented early on, during sample construction. Users can see at a glance how their specified targeting and quota definitions will affect the probability of completion.

The benefit

The system provides upfront, easy-to-interpret feedback during sample configuration rather than in the middle or towards the end of a project. This allows for early, thoughtful adjustments to quotas and targets – massaging around the edges as needed, rather than scrambling for solutions when the clock is ticking.



Calculating Scarcity

How does Targeting Scarcity work? Dynata assesses all of the known potential participants who answered targeting questions in the last 100 days, and compares that to those who have matched the specified requirements. If, say, 2.5 million people have filled out a targeting questionnaire in the last 100 days, but only 25 of them match the potential requirements, the likelihood is $25 / 2,500,000 = 1$ in 1 million. Quite scarce!



Lessons from the trenches: Mistakes to avoid despite the temptation

Avoiding Common Pitfalls

Even with the right tools and protocols, sampling success also depends on what you don't do. Over time, certain well-intentioned habits have crept into the industry – and while they may seem helpful on the surface, they often introduce unnecessary and avoidable complexity and risk.

One example: **overloading a project with third-party sample providers**. We've seen users add 10, 20, even 25 sources to try to “guarantee” feasibility. But if a project isn't viable with five high-quality providers, it's unlikely to succeed with more. Past a certain point, you're just multiplying the chances for error.

Another common issue is **overly complex quota nesting**. Projects with thousands – even hundreds of thousands – of quota cells are not only difficult to manage, they're vulnerable to setup mistakes. Our guidance is simple: if a human can't mentally track the logic, it's too complex. Aim for clarity.

We generally recommend staying under 150 quota cells. That means being strategic about nesting variables like age, gender, region, and income. The more you combine, the more cells you create – and the more difficult your project becomes to manage, especially across multiple providers. Simpler structures typically lead to stronger results.

At Dynata, we believe reliable and repeatable research doesn't come from doing more – it comes from doing what matters, with precision. By streamlining complexity, guiding smarter decisions, and avoiding unnecessary risk, we help our clients focus on what they're really after: data they can trust, time and time again.



dynata¹™

About Dynata

At Dynata, we deliver the highest quality first-party data to help businesses around the world gain precise insights, activate the right audiences, and confidently measure impact. With industry-leading respondent accuracy, reliability, and commitment to continuous improvement, Dynata is the trusted foundation for smarter decision-making. We serve more than 6,000 market research, media and advertising agencies, publishers, consulting and investment firms, and corporate customers in North America, South America, Europe, and the Asia-Pacific region.

Learn more at www.dynata.com

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