Migrating a Tracker:

4 Ways to Migrate Without Impacting the Overall Data

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RESEARCH SOLUTIONS

Tracker studies are some of the most important studies fielded in market research. They're used by large brands, consumer goods companies, and others to track consumer sentiment around their products or services, and to measure advertising and other functions of the marketing mix.

But in the life of every tracking study, there comes a time when you may need to make a change in the sample supplier mix you are using.

Migrating a tracker can be a very stressful time for many market researchers. Everything from data inconsistencies to lack of feasibility could occur and cause problems not only for the researcher, but for the brand as well.

That's why when it comes time to migrate a tracker, you must be sure to use the right migration method for the scenario you are facing.

Scenario 1: New Tracker

This scenario is both the easiest and potentially the most difficult. You have a new tracking study you want to get up and running – that is easy. The hard part comes when selecting the right sample panels to ensure you get accurate and consistent results for years to come.

Best Migration Method:

Build a New Strategic Blend

When launching a new tracker, building a strategic blend of sample providers is the best method to ensure you maintain consistency and feasibility over time. When you are blending sample providers, be sure to look at more than just feasibility. You should consider all the following factors when you are crafting a strategic blend:

- ATTITUDES & BEHAVIORS BY PANEL
- YOUR INTERNAL KPIS
- FEASIBILITY
- TARGETING CRITERIA
- FIELDING TIME & FIELDING INTERVALS

After taking these factors into consideration, build a strategic blend of sample providers.

Scenario 2: Poor Performing Panel Partner

📈 We are sure you have experienced this with ad hoc projects. A panel you awarded the project to just drops the ball. It's a pain even then, but with a tracker, it can be worse because it potentially causes lasting problems.

Panels on trackers are harder to replace because replacing even one of them not only impacts a specific wave of the tracker but can also impact the data going forward in addition to your ability to compare to previous waves.

Best Migration Method:

Replace an Existing Panel on an Existing Tracker

📈 While many researchers may think they are stuck with a poor performing panel in the name of consistency, but that is not the case. It can be a challenge to maintain data consistency, but it is not impossible.

To replace a poor performing panel, you want to identify "like" panels in terms of attitudes and behaviors to the panel you are looking to replace. Generally, if a panel's attitudinal and behavioral data is similar, other factors are as well, such as recruiting methodology, etc.

Then you can create a strategic blend of the "like" panels to replace the poor performer.

Scenario 3: Using a Specific Panel on a Tracker

In this scenario, you could be rethinking your current panel mix on an existing tracker or have a new tracker you are starting, but in both cases, there is a panel provider you really like working with and want to be sure they are included in the mix moving forward.

Best Migration Method:

Build a Strategic Blend that Complements a Specific Panel

This method is like the one used in the second scenario, but backwards. Instead of identifying the "like" panels to replace a panel, you are looking to identify panels that would best complement a specific panel based on attitudes and behaviors.

You can then construct a strategic blend of panels that best complements the panel you want to be sure to use on your tracking work.

Scenario 4: Replacing an Unknown Panel Mix

📊 This is the most difficult of all 4 scenarios we have presented. In this scenario, you have a mix of different panels on your current tracker and the mix is not performing. You want to replace them, but the problem is you aren't sure what panels are currently in your mix.

Best Migration Method:

Identify and Replace

📊 Migrating a tracker without impacting consistency in this scenario is possible, it just takes a little time. First, you'll want to build out a new strategic blend, like when you start a new tracker. Then you will want to run a side-by-side comparison to the current mix on your tracker. Afterwards, you can adjust the new blend to help identify the panels on your current tracker.

Once you have identified the current panel mix, you build a new strategic sample blend of "like" panels based on:

- ▾ ATTITUDES & BEHAVIORS BY PANEL
- ▾ YOUR INTERNAL KPIS
- ▾ FEASIBILITY
- ▾ TARGETING CRITERIA
- ▾ FIELDING TIME & FIELDING INTERVALS

Strategic Sample Blending

As you have probably noticed, in each scenario we talked about building a strategic sample blend as part of the solution for each tracker migration scenario. That is because strategically blending sample is a best practice for tracking studies.

Strategically blended sample not only blends three or more sample providers, but the selection and blending of the selected providers is done in an intentional and controlled manner.

Providers are selected to complement one another while reducing the overall sample bias and any potential behavioral or attitudinal impacts a panel can have. This ensures not only the accuracy of your tracker's data, but that it is truly representational of the demographics, behaviors, and attitudes of your target audience.

By strategically blending your sample, you can ensure the consistency and reliability of your tracker and the data it provides, allowing you and your organization to make the best business decisions possible.

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"What's it like having a partner like EMI work with you on a tracking study? They know as much about the study as I do. They have documented past changes in approach and remind me when needed. They are invested in our success. They do not allow topics or requests to fall through the tracks. They are partners in the true meaning of the word.

Simply put, they understand market research. Diligent, responsive intelligent, aware."

PAUL FLAXMAN
VICE PRESIDENT, BOSTON RESEARCH GROUP

EMI Research Solutions is a leading online sample consultancy. Since 1999, we have have been the expert in migrating tracking studies for everyone from full service market research firms, large consumer brands, to other Fortune 500 organizations. Our unique strategic sample blending approach, including our premier IntelliBlend® methodology, is the industry best practice blending sample in an intentional and controlled approach. Combined with SWIFT, our proprietary sample management platform, and our world-class customer service, EMI can craft you a custom solution that will ensure the long-term feasibility and viability of your tracking study.

To learn how EMI can help you migrate your tracking study, request a free consultation.