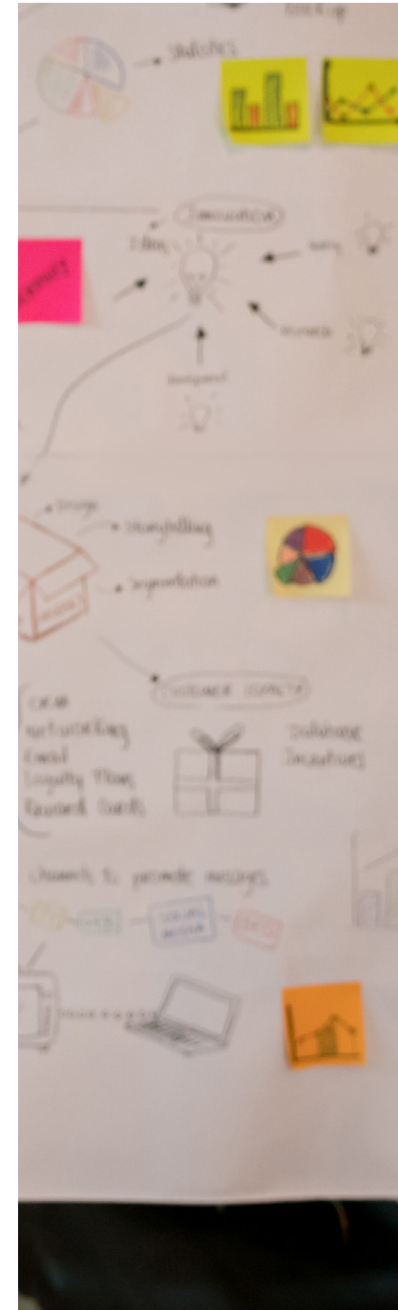


qualtrics^{XM}

The ultimate guide to building a world-class brand tracker



Focus on the fundamentals of brand tracking

In this guide, we'll focus on 3 fundamentals you need to think about as you design a world-class brand tracker that will become an invaluable tool for brand growth. Here's the key elements we'll cover:

REFLECTING REAL WORLD CONSUMER AND MARKET CHANGES

To say the world is changing is something of a cliché — it always has and always will. But one thing is for certain, the pace of change is accelerating.

Your brand tracker, therefore, needs to pay attention to the shifts occurring beneath the surface of traditional aggregate metrics that rarely seem to change. Designing a tracker that reflects the dynamism of the marketplace and anchoring your survey logic to the latest understanding of consumer behavior allows you to see subtle shifts that can have a big impact on a market.

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GOING BEYOND THE SURVEY TO DRIVE ACTION ACROSS THE ORGANIZATION

Too often, tracking is focused on the survey component, and doesn't align to the goals your various stakeholders may have. The result? Lots of answers to survey questions, but very few actionable insights into how to support your organization's goals.

Similarly, many trackers are siloed from the rest of the organization whereas they should be integrated into your operations and the insights used to guide decision-making in various teams. As you mature your tracker, you can start to integrate new sources of data such as O-Data and X-Data from other initiatives and then use those insights to help inform initiatives that will grow your brand.

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ASKING THE RIGHT QUESTIONS OF THE RIGHT PEOPLE

There are plenty of KPIs you can use in your tracker, both from traditional methods and new ones. The key is to understand what they are, how they contribute to your understanding of brand strength, and the focus on the ones that deliver the outcomes you want.

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A brand tracker fit for the real world

THE OLD WAY

One of the most common pitfalls of brand tracking is anchoring it in your personal thinking. Try as hard as you might, it's almost impossible to avoid the biases that this will inevitably create in your tracker.

From using marketing jargon that's meaningless to your everyday consumer to building brand lists, avoiding self-bias is difficult.

Take brand lists as an example. A traditional approach would be to curate a list of all the brands that you, as a marketer, care about and then present that list to your consumer panel and ask them to choose which ones they use or would consider using.

Now think about that in the real world. We know that purchase decisions are intuitive, not rational — they're 'type 1' neurological responses which happen automatically, drawing on all the associations that person intuitively has about a brand, rather than being a rational trade-off between different features.



Qualtrics helps all of our internal stakeholder partners design better experiences, design better products, and understand where we can improve customer satisfaction.”

PROFESSOR RAVI DHAR, YALE SCHOOL OF MANAGEMENT

Back to our brand list then. Say you were presenting a list of beer brands and there were 50 brands you cared about as competitors — would a consumer ever really make a decision between 50 brands? Instead, they make an immediate decision, only ever really considering a handful of choices.

By anchoring your logic in your own worldview, you usually see trends that show no relationship with real-world outcomes — something that has plagued the brand tracking industry for decades.

THE NEW WAY

Being market oriented means factoring in the consumer's own worldview (and believe it or not, they don't see brands as central to their lives quite like marketers do!). Your goal is always to get as close to real-world behavior as possible, rather than forcing them to make decisions they would never really face in the real world.

Take our beer brand list as an example. Instead of presenting them with your list, you could ask them an open text question about which brands they would consider and have your respondents give you their list. It's closer to their real-world behaviour and allows you to focus your research on things that genuinely matter to your customers.

One recent McKinsey¹ study found that 90% of categories were 'shopping driven' - that is to say consumers don't consider themselves loyal to brands and will happily look into something that signals a better deal or a new experience.

¹<https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/the-new-battleground-for-marketing-led-growth>

So rather than asking respondents to pick from a list of brands that you think matter, just ask them which brands matter to them. Open text questions like this allow you to hear it in their own words, and allow you to then dig into their responses to understand more about their attitude to those brands they actually use or consider in the real world.

The same applies to all sources of your brand's core equity like imagery, attributes or perceptions of quality - first understand how they respond to it on an intuitive level before diving deeper into their real-world behavior.



Go beyond the survey and drive action

At the very start of the process, it's essential to focus on what your stakeholders want from the tracker — this has the benefit of keeping your tracker useful to guide decisions throughout the business.

THE OLD WAY

Many trackers start by identifying the questions to ask or the specific metrics to focus on. And while it is very tempting to fall for the latest equity model out there, beware of the black box — with so much of your success hinging on a comprehensive design, the last thing you want is to track a set of metrics you don't really understand or can't take action on.

This approach typically results in the tracker becoming a 'rear-view mirror,' reporting what's happened in the past - great for internal reporting but almost useless for planning your investments going forward.

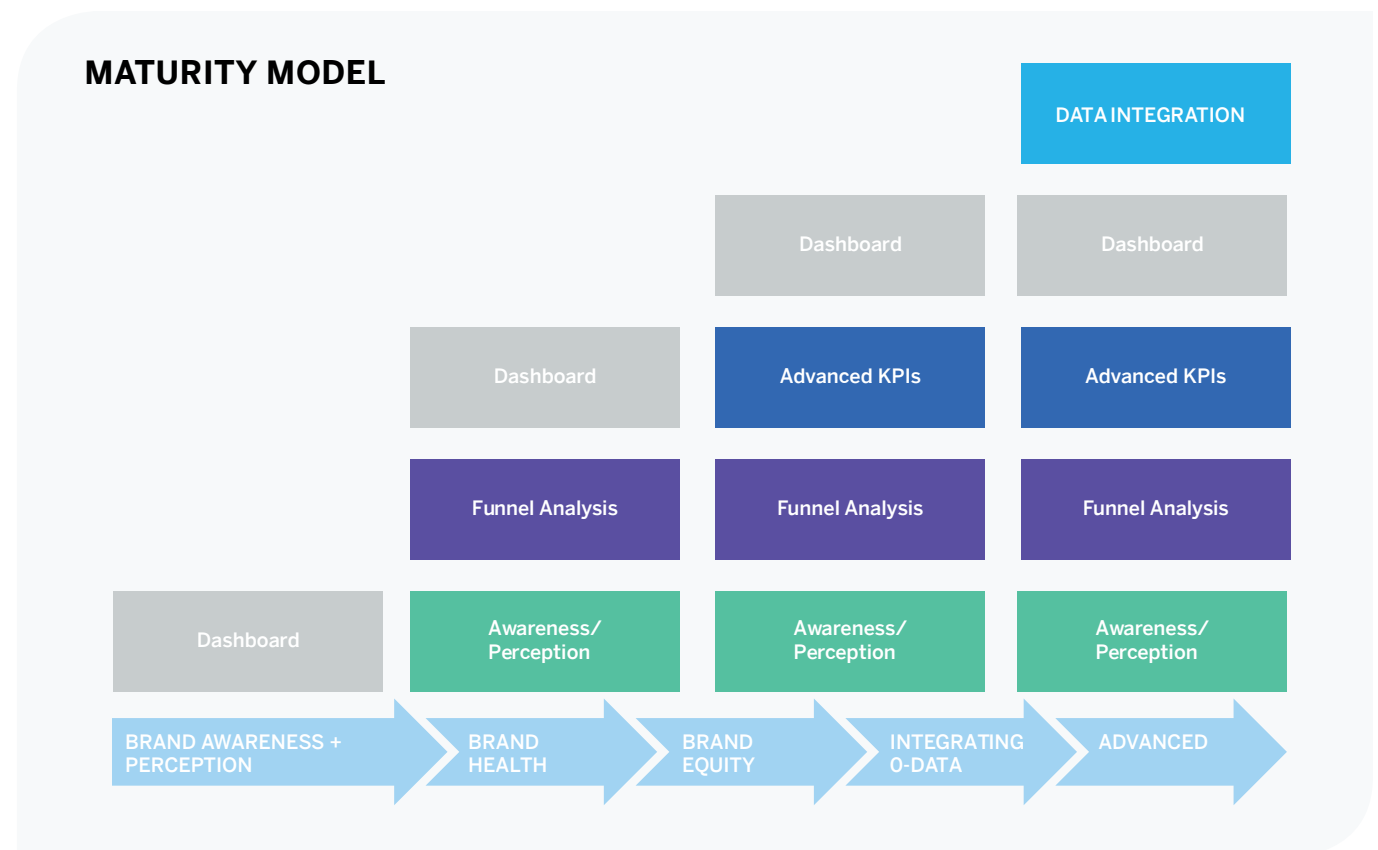
THE NEW WAY

A world-class tracker is one that's designed to provide prescriptive guidance over the quarters and years ahead. That means it's able to inform brand plans, guide the most impactful marketing investments and keep track of how your brand is performing.

Is the overall strategy working? Is it positively shifting the way your target segments think about the brand? What types of marketing initiatives best support your short-term and long-term goals? Are the steps you are taking to address some of your vulnerabilities working? What competitive strength and brand perceptions should you capitalize on?

These are the kinds of questions your tracker should be answering, so make sure you start from the objective, and not the measures, to ensure it genuinely drives actions and impact across the business.

It's useful to build your brand tracker over time, rather than going all in on a complex architecture from day 1. Here's a useful maturity model to help guide you along the journey:



1 BRAND HEALTH CHECK

Start with a simple instrument that includes everything you need to know about the current state of the brand. This is an incredibly useful diagnostic for stakeholders to see at a glance how you're performing so you can dive deeper into specific areas.

2 INTEGRATE OTHER DATA SOURCES

At stage 2 you can start to connect the dots between various research initiatives that might be happening around the business. For example, if you're investing in social listening, this is a great opportunity to bring it into your tracker and start to build up a richer, more dynamic data set that more closely can track ebbs and flows in the market. At this stage you can also start to overlay operational data like financial or CRM data as well as X-Data from your CX or EX program to connect the dots between what's happening in other areas of the business and the impact on the brand.

3 INSIGHTS INTO ACTIONS

The final stage is to use the insights from your tracker to inform other marketing initiatives. For example, if you find through your tracker that a certain group of respondents show discontent towards the brand, you can create media audiences through lookalike modelling and target them at scale to address the issue.

Asking the right questions, at the right time, of the right people

Now you know what you're trying to achieve and have a plan for how you're going to mature your tracker over time, it's finally time to think about the metrics and the questions.

There is no predefined standard list of measurements — nor should there be! After all, we've already seen how the design should reflect your unique requirements.

However, there are a few common metrics that are certainly worth considering:

AWARENESS

This reflects how many consumers recall or recognize the brand's name or logo as a member of the category. Awareness is the first step toward building brand equity, as thoughts and feelings about the brand rarely develop without it. This probably explains why the measure sits at the heart of numerous equity models. It should be noted that awareness is also commonly reported at board level as a measure of brand performance. This level of visibility makes it all the more important to ensure the distinction between the various types of awareness measures.

The three most common forms of awareness are:

- + **top of mind** - the first brand consumers recall in response to a product category cue
- + **spontaneous** - captures other brands as well as the first that come to mind
- + **aided awareness** - recognition of the brand when prompted by a stimulus such as a name or logo

Awareness is a measure that matters to all brands, though the type of awareness will vary depending on your situation eg. whether you're a start-up or an established brand.

I'd like you to think about banks in your area. Please tell me which one first comes to mind.

What other banks in your area come to mind? Please list up to 3 more banks.

BANK 1

BANK 2

BANK 3

Including any banks or credit unions that you may have just mentioned, which of the following banks in your area have you heard of? Please select all that apply.

THE Q BANK

EXTRA CREDIT UNION

THE GOOD BANK

CONSIDERATION

This refers to brands that come to mind when asked about purchasing the category in the future. It is a useful construct to use as it focuses attention on future behavior, and can be measured either in absolute or relative terms.

Absolute consideration measures a consumer's likelihood to choose a brand in the future:

How unlikely or likely are you to consider choosing the Q Grocery Store the next time you go grocery shopping?

EXTREMELY
UNLIKELY

SOMEWHAT
UNLIKELY

NEITHER
UNLIKELY NOR
LIKELY

SOMEWHAT
LIKELY

EXTREMELY
LIKELY

Relative consideration on the other hand measures the likelihood that your brand is in a consumer's "backup plan". This is a useful measure to understand the brand most relevant to consumers other than the one they use regularly. According to McKinsey², nearly 70% of consumer purchases are powered by initial consideration, making it an important metric as brands attempt to attract customers from their competitors.

²<https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/building-brands-in-emerging-markets>

BRAND USAGE

Beside providing information about your brand, trackers are also a great source of competitive or category intelligence. Usage questions (e.g. share of wallet) generally help set the context for all other metrics, as analysis of non-users and light users can help determine the levers to pull in order to appeal to these core groups or remove some of the barriers they face to access the brand.

With these measures, try to avoid using questions that feel impossible to answer accurately (e.g. in the last 12 months, how many...) as this can result in very inaccurate data.

BRAND RELATIONSHIP/ATTITUDE

This is used to assess the opinions consumers have toward your brand relative to your competitors. There are a number of questions that can be leveraged here, but whichever one you use, it's critical to analyze the results relative to the scores of the other brands in the consideration set.

BRAND IMAGERY

A classic module used in most trackers, this helps determine if the brand positioning is aligned with expectations, and measures the impact of specific advertising campaigns. It's a useful way to assess how campaigns are reinforcing specific associations in the minds of your consumers.

ADDITIONAL METRICS TO THINK ABOUT

While those are the most common (and often the most useful) metrics to use in a tracker, there are plenty more you can use to suit your requirements, such as familiarity, preference, purchase intent, and even NPS.

What all these measures above have in common is that they are a move away from the attitude-based measure which have characterized brand tracking in the past. Attitudinal measures tend to be very slow moving and offer a long-term view, making it hard for brands to respond to the speed of change they're witnessing in their markets. Newer measures that focus on 'physical availability' - the ease with which a brand is found and selected — and 'mental availability' — how easily they come to mind in real-world buying decisions — are much more dynamic and track the shifting attitudes and preferences of consumers more closely.

But remember, whatever metrics you choose, keep it simple.

Adding more measures does not necessarily improve the quality of insight — in fact complication is all too often the death knell for a brand tracker as it becomes unwieldy and stakeholders struggle to get actionable insights from it.

While each measure should always be analyzed in isolation, it's a good idea to combine them for 'extra punch' too. For example, awareness, consideration, usage, and preference are often combined to chart the performance of the brand at different stages of the funnel relative to the competition. This can be really useful to identify at which stage your brand is performing well and track the impact of any improvements on moving customers from the top to the bottom of the funnel.

Selecting the right respondents for your sample

One of the most important elements of brand tracking is the sample, and it often seems like the least considered element in the whole process. If you have the right group of people answering your questions, the relative data will still be useful even if the metrics as a whole aren't perfect. However, if you have an inconsistent sample from wave to wave, it won't provide useful information no matter how perfect your survey design is.

WHO TO TARGET?

In order to catch changes in consumer behavior and changing habits or needs, it's important to keep your sampling profile as broad as possible, including anyone that could possibly be interested in, or potentially purchase, your brand/product.

It's helpful to start there so that you can detect changes in perceptions and attitudes that your marketing campaigns can affect across different audiences. If you need more of certain types of people to get a deeper understanding of their experiences, feel free to use oversampling.

The overall sample should be broad however, and should be consistent. You should also set your sample up so it reflects national representations from a demographic perspective.

WHERE TO GET YOUR SAMPLE

Panel companies are the single biggest source of sample respondents in the world. They manage and curate populations of people in various geographical areas, with specific interests, and a propensity to participate in research.

They are continuously improving their ability to source and engage with their members, and are an excellent source of minimally biased sample.

However, studies have shown that there is a difference between the way that a group of panel respondents will behave in a survey and the way those who are not panel respondents behave.

This difference exists, so it's important to at least understand it, and then to decide if something needs to be done about it. There are some industries where it won't matter much, and others where it will. Luckily there are options for adding balance to your sample by sourcing from a panel and from content publishers online who can invite potential respondents to participate in a survey in exchange for access to content or some other reward. Leveraging a mix like this can be helpful in balancing the data that you get.

HOW TO MANAGE YOUR SAMPLE WAVE OVER WAVE

Just like panel members are different from non-members, the panelists within a specific panel will be different too. That's why it's important to consider feasibility for a longer period of time instead of just a single wave.

We've seen dozens of clients go through this. They set a lockout period that is fairly aggressive and, when they come to the end and find they don't have enough respondents, they resort to bringing on another panel provider to complete their data collection needs.

This is helpful in a crunch, but it's not the optimal way to set up your data collection strategy. Anticipate feasibility issues like this in advance when you set your lockout period, and if you think you might have issues in the future, create a panel blend which includes multiple providers from the get go, and set quotas for how much of which kind of sample each company can provide.

ALWAYS REMEMBER TO CLEAN YOUR DATA

If you aren't routinely screening out 10-15% of your sample due to quality issues, or removing their data after data collection is complete, you have noise in your tracking data.

We routinely see 10-15% of data quality issues with any panel company that we work with. We implement smart technology to flag things like potential duplicates based on IP address, location fraud, straightlining, speeding, and other potentially negative responses so that we can review them and eliminate them if their quality is questionable.

This helps in giving us consistent data trends that we can trust.

**Learn more about
Qualtrics ExpertReview**

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**Qualtrics makes it easy to launch
a world-class tracker**

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