



GUIDEBOOK

Implementing a Retail Panel to Understand Markets

RECOMMENDED CITATION

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INTRODUCTION

In developed commercial markets, data on market performance is routinely gathered to provide commercial market players (e.g. distributors, manufacturers) a clear and updated picture of the market. This analysis provides a frequent pulse on how the market is performing in terms of depth (volume and value) and breadth (range of products, price points, places available, investment in promotion). They can track performance of their own products and competition. These players use this market intelligence to design their go-to-market strategies. Additionally, non-profit organizations, governments and donors can use this market data to build an understanding of where there are constraints in the demand or supply of a particular market, and where they might intervene to improve the accessibility of a product.

This market information is often collected through retail audits. They are usually a syndicated market research tool – Nielsen ratings are a well-known example. They provide information of interest to multiple market players within a product category at a much lower price than if it were to be collected individually. A key advantage of retail audits is that they are conducted frequently (typically monthly), which gives market players the ability to react quickly to changes in the marketplace.

THE PROBLEM

In many low- and middle-income countries, a typical retail audit is not feasible. There are too few commercial players to buy into such an expensive study, and governments or NGOs may not have funding to support this kind of large-scale data collection. Furthermore, even where retail audits are available, they may focus on formal channels only – while the informal sector often makes up a significant portion of the market. Thus, there is a need for a more practical and cost-effective approach to collect regular market intelligence in low-income settings.

RETAIL PANEL

A retail panel is lower-cost alternative to a retail audit that can be used to generate routine information on market performance and structure. While commercial retail audits aim to represent as much of the market as possible, retail panels rely on a representative sample of outlets. Depending on the sales and distribution structure in a market, the sample could focus on the highest volume retailers (i.e. the 20% of outlets that cover 80% of the market volume), or – in a flatter market structure – on a representative sample of outlets.

The panel collects key information on the outlets offering the product of interest, as well as the market volume, value, and the types of brands and variants available. These indicators provide market players with a “pulse” on the market to facilitate decision-making. This document provides a guide on how to set up a retail panel in a developing market – based on the experience and learnings from a retail panel of condom availability designed and conducted by PSI in a largely informal market in dense urban areas of Mozambique.

Piloting a Retail Panel Approach using Mobile Technology to Assess Condom Market Health in Mozambique

The overall objective of the Mozambique Retail Panel Study was to test a data collection approach that could produce market information that is useful to multiple condom market actors. The study consisted of a multiple measure retail panel that collected monthly data from a sample of retail outlets across four waves in two key markets (Maputo and Nampula). A selected sample of retail outlets were enrolled through an interviewer-administered in-person questionnaire during the first wave and then repeated at the fourth wave. Outlets that consented to participate were randomized to receive monthly remote surveys by either IVR or SMS during all four waves. The study collected information regarding the availability, stock, purchase, sales, and price of condoms sold by the outlet.

When should I consider a retail panel?

Before implementing a retail audit panel study, it is recommended to firstly explore what other data sources might be available to provide market data. In some markets retail audit data (e.g. Nielsen, IQVIA) is available. If this provides

adequate information and resources permit, it is usually best to purchase the data. When formal retail audit data are not available, implementers doing direct distribution (such as Social Marketing Organizations) may have a list of outlets where sales and distribution data are being tracked. These data may be made available to other market players upon request. Finally, if distribution is through distributors or wholesalers, it may be possible to obtain outlet information from distributors or wholesalers. Their willingness to share the data will likely depend on their working relationship with market players, and the ability to leverage the retail audit data for their own use.

In some countries, there may be challenges with gathering data from 3rd parties:

- When there is low coverage of the product of interest in the market, it is harder to identify outlets selling the product;
- If there is a large informal sector, it is likely that outlet information will not be readily available;
- Implementers, distributors and wholesalers may not have complete information on the outlets they supply, or may not be willing to share.

In cases where purchasing or sourcing existing data is not possible but where information on outlet location can be obtained, implementing a retail panel may be the most useful means of collecting the market indicators of interest. A retail audit panel can be funded by one market player (e.g. a donor), or there may be an opportunity to crowd in funding across multiple different market players who will all benefit from the data.

ABOUT THE IMPLEMENTATION GUIDE

This implementation guide provides recommendations for organizations planning to conduct a retail panel in low-income countries. It captures the considerations for designing and conducting a retail panel and sharing the results with other market players.

The Guide is divided into the following sections:

- 1) Setting Up a Retail Panel
- 2) Field Operations
- 3) Data Management and Analysis
- 4) Data Presentation
- 5) Sustainability of a retail audit panel approach

1. SETTING UP A RETAIL PANEL

DEFINING THE STUDY TEAM

A retail panel requires a team with experience in marketing and research methods to ensure that the design is fit for purpose. In addition to experts in each of these areas, the team will also need support staff to help with budgeting, data collection, analysis, documentation, and dissemination. Ideally the team members will be primarily based in-country, as an understanding of the local market context is invaluable. If the implementing organization does not have all the skills or capacity in-house, consultants or contractors may be needed to support the project.

REFINING OBJECTIVES

While the broad objective of a retail audit panel is to gain insight into market performance (through key indicators), there will likely be varying data needs and multiple objectives depending on the country and market context. As the objectives influence the study design, it is important that the team have a clear understanding of what its funders and stakeholders wish to learn from the panel and how the results will be used to shape the market system and/or by commercial sector/SMOs to design go-to-market strategies (if the study team is part of an organization involved in distribution or sales, it should also consider the utility of the data for the organization's own marketing strategy). Teams should collect stakeholder inputs in a series of in-person or remote meetings and use them to refine the objectives prior to outlining the study procedures. Critical elements to consider when defining objectives are:

- ☐ the operational definition for the product category,
- ☐ the geographical scope of "the market,"
- ☐ the disaggregation required (by brand, variant, or geography) for key indicators, and
- ☐ the level of confidence required from the study data for decision-making.

Note that in this type of study, there is a **trade-off between measuring coverage across the entire market and collecting detailed data on outlets that carry the product**. This is especially true in settings where coverage is low overall. For example – in the pilot, the criterion used was defined to measure volume and value and to be able to track the stability of the market over time. As a result, the pilot focused on outlets that had condoms from the start of the study, rather than tracking whether the percentage of outlets that have condoms was increasing or decreasing across the entire market. Had the pilot focused instead on measuring coverage of condoms across the market, data on sales volume and pricing would have been less feasible to collect with accuracy because the panel would have included a large proportion of outlets.

DESIGNING THE STUDY

Constructing a Sampling Frame

A retail panel builds a representative sample of outlets by geographic area. An outlet listing activity is performed to: 1) generate site-specific indicators of product availability and market structure; and 2) create a sampling frame from which to select the panel of retail outlets stocking the product that could be enrolled in the study.

Recall that in some cases, a list of outlets may already be available from Nielsen or another source. Assuming the data is valid, the study team can draw a sampling frame and then choose which outlets to survey. Even where data is available, it should be tested in a brief mapping exercise to confirm that it is accurate and recent enough for practical use. If not, enumerators will perform the listing activity manually.

For situations where there is no preexisting data to help with constructing a sampling frame or where having any information at all is more urgent than rigor and representativeness, a team may collect data using other ad hoc sampling

methods. In these cases, the data may be available more quickly, but care should be taken in generalizing from this approach to the total market.

Defining the Unit of Analysis

It is important to identify the various types of outlets in the market for the product to ensure that they are captured in the sampling frame. For example: pharmacies, grocery stores, 'mom&pop' stores.

The research team must first understand the formal/informal market mix. Depending on the product type, it is likely that in low-income countries, a large proportion of the market is informal. If sales are predominantly in the informal sector, focusing only on the formal sector will not represent the market accurately.

Outlet types must be defined for each country and product of focus. If an objective of the retail panel is to produce representative data by outlet type (e.g. pharmacy, convenience store), it will be necessary to set the sample size so that enough outlets of each type are included. This may require a larger sample (and thus budget) overall or may require oversampling of certain outlet types and appropriate statistical weighting in the analysis of the entire market.

Finally, validation of outlet types in the field is a key step to ensure that enumerators can distinguish them during the listing activity. Different enumerators should be able to consistently classify retailers as the same outlet type: if not, the definitions of outlet types may need to be clarified or training may need to be reinforced. Taking photos and providing written definitions are helpful to enumerators during field data collection.

ADDITIONAL TIPS FOR THE LISTING ACTIVITY

- Some informal sector outlets may only be open in evenings. If the listing activity is done during the day and a sizeable proportion of outlets are closed, the team may consider sending a team of enumerators to return in the evening. Mechanisms for collecting data after-hours should also be built in to all waves of data collection.
- Expansions or changes to the unit boundaries since the last census can cause some outlets to fall outside the team's enumeration map. Local authorities may be able to reconcile differences involving changing administrative boundaries.
- Consider working with communities and community leadership to facilitate the listing activity and ensure that the team will be well received during data collection.
- Sample size calculations should consider non-response in surveys, especially mobile ones, and expected drop-off across survey rounds.

Setting Inclusion Criteria

Outlets may be included in the study based on whether the type of outlet can sometimes carry the product, whether a particular outlet usually carries the product, or whether it has the product in stock on the day of the listing activity.

The decision to set the inclusion criteria based on potential or actual stock will depend on the objectives of the retail panel. For instance, to measure the coverage of the product, the team should include all potential outlets in the market area. To determine the stability of the market over time, it makes more sense to include only those that have the product at time of the listing activity and track the proportion carrying it by the end of the study. This approach will provide more detailed information on outlets that carry the product but would miss an expansion of availability in the market.

Another key consideration is whether outlets are associated with a geographic location that be identified with GPS coordinates for follow up. In contexts where most outlets are mobile, the sampling frame and data collection procedures will need to be modified accordingly. This will presumably be more complex and have a higher loss to follow up. Consult a research expert to provide additional guidance in this case.

Multi-Stage Sampling Strategy

In most low-resource contexts, conducting a census of all outlets in the market will not be feasible, so a multi-stage sampling procedure is used. Geographic areas can be randomly selected by probability proportional to size (PPS) based on either the population of retail outlets, if known, or on

the population living in administrative areas, if this is thought to be proportional to the scale of retail activity; enumerators then take a census of outlets in each area.

If an estimate of retailer numbers is not known and the geographic area to be covered is large enough that a comprehensive census is unrealistic, one method is to conduct multi-stage sampling by the population using PPS. This method considers where the population is concentrated and assumes that, on average, the geographic areas with more people will also have more outlets. In the first stage, enumeration areas are selected into the sample by PPS. It is recommended to use the smallest administrative unit for which population-level information is available and that can be practically identified at the community level using local maps and/or GPS. Population size projected from the most recent census guides the first-stage sampling.

Key Assumptions:

- The number of outlets in each geographic unit is proportional to the population size¹
- The population size in each unit has grown proportionally across all units since the last census
- The boundaries of geographic units can be reliably located by a team of data collectors surveying the outlets

In smaller markets, if PPS sampling does not achieve a sufficient number of retail outlets to enroll in the panel, teams will need to adjust their approach to conduct a census of all outlets that participate in the market. Alternately, if the sampled geographic units are found to have many more outlets than is needed in the sample size, a random subset of the outlets in the selected geographic unit can be included in the panel. For a given sample size, selecting more outlets per geographic unit with a smaller number of units will typically be more cost effective, but provide less statistical power than having fewer outlets from a larger number of geographic units. Geographic dispersion that is both statistically valid and *feels* representative when presented to market players is best achieved when many small geographic units are selected and mapped.

Sampling Procedures

A map with GPS coordinates indicating the boundaries of selected units can generally be obtained from the country's Bureau of Statistics. Within each unit, enumerators will conduct a census of eligible retail outlets based on the outlet inclusion criteria defined earlier. Prior to conducting the listing, enumerators should be trained on how to identify the boundaries of the selected units, how to identify outlets, and how to complete the listing form. The team should spend a few days field-testing the listing form before collecting data.

All outlet categories that could potentially carry the product (e.g. where we expect the product to be sold) should be included in the listing, regardless of whether they have the product in stock that day. Key data elements on the listing form include: outlet location, outlet name, location description, GPS coordinates, outlet type and presence of the product. Best practice is to use an electronic form for the listing, which can allow near real-time data quality reviews, including comparing outlet coordinates with maps of the select geographic units and checking for duplicates. If outlets are tightly clustered in urban market areas, GPS coordinates may be insufficient to locate the same outlet in the future: it may be necessary to collect a detailed description of the outlet and/or photographs of the outlet exterior to aid reidentification.

Careful documentation of the sampling strategy and listing procedures is important, as the activity may be repeated periodically to update the overall measure of product availability in the market.

¹ This assumption may be tested if some but not all the geographic units have population data available, or if there is historical, reliable, but outdated data on outlet counts that can be compared to historical population estimates.

Identifying the market and selecting Market-Level Indicators

The survey in Mozambique focused on Condoms – a ‘fast-moving consumer goods’ product that is distributed through multiple channels. It is also usually a category with multiple brands and variants. When using mobile technology, there is a trade-off with how many products or brands you should include – as this may affect response rates and drop out. In Mozambique, the in-person questionnaire collected data on all condom brands sold by the outlet, but limited collection to the top three brands for the mobile version of the survey.

Similarly, while it may be desirable to add other products (e.g. oral contraceptives or another fast-moving consumer goods) to a retail panel, this should be weighed against the potential impact on response rates and retention in the panel due to questionnaire length.

Market-level indicators to be collected during the panel may vary with the intended study objectives; however, they should generally include the following:

DATA COLLECTION	ANALYSIS
Volume – total # of consumer units sold	Size of total product category in value and volume: - Total unit volume sales - Total value of sales (<i>total units x consumer price</i>) - Performance trends over time (growth or decline)
Brands, variants and pack sizes: - Identification of all brands in the market and range (variants/pack sizes) - Total units sold by brand/ variant/ pack size.	Breadth of brands and variants available in the market. Performance of brands in the market: - Total volume and value of sales - Market share (% of total market) - Performance trends over time (growth or decline) Identification of new brand/variant launches.
Pricing: Consumer price by brand and variant	Pricing by brand (and variant where relevant): - Consumer price per unit - Pricing changes over time. Identification of pricing tiers within the market and performance (size and growth) across each segment.
Availability: # of outlets that sell condoms and each brand.	For total market and by brand: % of outlets that stock the product - Stock outs - Distribution changes over time Note that these are only possible for surveys that cover all outlets within an outlet type (not those only stocking the product)
Off-take: # of units sold per week per outlet – total condoms and by brand.	For total market and by brand: # of units sold per week per outlet - Changes in offtake over time.

**For trends over time: compare vs. prior period and vs. same period prior year.*

If possible with sample size: split data (at total product market and brand level) by geographies and/or channels.

The marketing and research leads should collaborate closely to check that the desired market-level indicators are feasible to collect within time and budget constraints. Questions included on the survey should be numeric or short answer responses and formulated so that participants can easily summon answers about the outlet's stock and sales figures.

2. FIELD OPERATIONS

While there might be other mechanisms of data collection, and new methods continue to emerge, this study focuses on field operations for in-person data collection and mobile data collection as recommended modalities to collect retail panel data.

IN-PERSON DATA COLLECTION

Traditional in-person data collection is recommended when quarterly or less frequent information is sought. This method maximizes the richness, quality and validity of the data, yet comes at the highest cost. Even if remote data collection is planned for future surveys, in-person data is required at the start of the panel to provide baseline data and to enroll respondents and administer informed consent to contact them for further data collection activities.

Tips for conducting in-person data collection:

- Owners or managers of the outlets are usually best-positioned as respondents; if unavailable, an employee who typically operates the shop can serve as the respondent.
- While monthly surveys can use a (remote) mobile data collection method, in-person surveys should also be collected using smartphones or tablets. For security, it is recommended that data be uploaded from the devices to password protected-servers on a daily basis, at minimum.
- To assure the quality of the data from in-person surveys, 10% of outlets can be randomly selected for follow-up interviews to check values of key responses.
- Presumably, the sampling frame and panel will need to be refreshed routinely to ensure that it remains representative of the market. Frequency will depend on response drop off across survey rounds, changes within the market, outlet rotation, etc. For example, in context where there is a high turnover of retail outlets, large population movements, rapid urbanization, etc., teams will need to consider how over their panel must be refreshed in order to maintain a sample that is representative of the current market.

MOBILE DATA COLLECTION

Remote data collection via SMS messaging allows teams to reach more respondents in less time than in-person surveys, and thus is recommended if keeping a monthly or even weekly pulse on the market, and when the priority is a discrete set of indicators that can be collected from outlets reliably. However, mobile surveys typically do not achieve as high a response rate as in-person surveys. Estimates of response rates for SMS surveys vary greatly by context and population, and have been shown to vary from as low as 5% to as high as 40%.² The technology must be carefully set up so that the approach is low-cost and keeps the panel engaged over multiple waves of data collection.

If adapting an in-person questionnaire for remote data collection, some adjustments are necessary. Firstly, it needs to be as short as possible while still capturing the key data points. For example, it may be necessary to focus on the top two or

² Mobile Phone Surveys for Collecting Population-Level Estimates in Low- and Middle-Income Countries: A Literature Review. By: Gibson DG, Pereira A, Farrenkopf BA, Labrique AB, Pariyo GW, Hyder AA, Journal Of Medical Internet Research, 1438-8871, 2017 May 05, Vol. 19, Issue 5

three brands/variants in descending sales volume (i.e., capturing the most common brands). Question wording should also be simplified for the SMS format. Question order and skip patterns must be clearly articulated so they can be programmed into the mobile survey. Some indicators may be more appropriate than others for mobile data collection, for example, in the pilot binary responses (yes/no) provided better quality data than numeric or multiple-choice responses. For market health indicators, this means that measurements of coverage or availability will be more reliable in remote data collection than measurements of market volume or value.

Anticipate a steep learning curve when using SMS and budget extra time into the workplan to troubleshoot technology and connectivity issues, such as these:

- The order in which questions are received may not always match the order in which they are sent, leading to confusion.
- High participation requires setting up a short code to prevent charges for SMS replies.
- Phone voucher incentives can usually be sent directly to the retailer's mobile, but test whether the full amount can be sent at once
- Some complex questions may need to be split into shorter, simpler questions for remote data collection.
- Special characters in translated SMS surveys may not code properly.
- A prompt can be sent to let respondents know to expect the survey soon.
- Respondents should be allowed to opt out of participation in the current or future data collection activities during every round of data collection.

It is strongly recommended to pretest the questionnaire prior to launching the live survey – even the smallest changes can make a difference to the response rate and quality. Pre-testing should ideally be accompanied by in-person interviews to ensure that respondents understand what is being asked in the shortened remote survey.

DATA COLLECTION SCHEDULE

After the initial listing of outlets, data collection can proceed as needed. During the pilot the PSI team found that the following schedule balanced the value of having frequent information with the need for more in-depth data than was available in remote surveys:

- Quarterly in-person market performance deep dive
- Monthly market health 'pulse' through SMS focused on top three brands that can also be used to collect data on availability, price, and ongoing promotional activities

UNIQUE IDENTIFIER CODES

There is no one solution for assigning unique identifiers to outlets. Teams may decide to use the outlet owner's phone number, but with this approach there is a risk that the phone number detaches from the outlet it was meant to identify. Likewise, some outlets are operated by multiple people, some retailers share a phone with their neighbor, and retailers can switch phone numbers between waves of data collection. To ensure that the outlet, not the phone, serves as the unit of measurement, teams can also generate a unique identifier. Periodically verifying that the outlet being surveyed is the same one as originally listed with a unique ID may be necessary.

PARTICIPATION INCENTIVES

Adequately compensating the respondents for their time incentivizes a greater response rate, which is critical for measuring the stability of the panel over time. Compensation for participation may include promotional materials such as posters, display materials, and hats, as well as mobile airtime vouchers. Providing incentives to retailers at the first survey is important to assure them of compensation in later rounds. The team should take care to factor the amount paid to participants into the direct costs of the study. Any payment system may also require staff time to follow up on complaints about not receiving pay.

3. DATA MANAGEMENT AND ANALYSIS

DATA MANAGEMENT STEPS

For retail panel data to be available in a timely fashion, the data management and analysis process should be as automated as possible. Typical steps may include:

- 1) Download or export survey data and run pre-defined code to clean data of known problems, check for duplicates, and check for outliers. Care should be taken to drop any test responses.
- 2) Check unique IDs (such as phone numbers) against the panel list and make any changes necessary if phone numbers or other data have changed.
- 5) Standardize variables including consistent treatment of blank values and outliers between respondents and between waves so that data is comparable.

Outliers create a challenge for data analysis. While analysts may be tempted to remove them, some outlets do have unusually high sales volumes and excluding them would significantly change the mean sales results. Looking at the type of outlet, the past months' responses and the answers to other survey questions can help determine whether the number is a valid response. It may take several rounds of data collection with follow-up visits or phone calls to outlets to understand what thresholds should be used in any automated data cleaning processes.

Managing Remote Data

Expect extra challenges when managing remotely collected data: If comparing data from multiple data sources, such as in-person and remote data collection, special care may be needed to ensure the same rules are applied in data cleaning to ensure comparability. In the pilot, the data formats available for export from the mobile data collection company required additional merging and cleaning before they were ready to analyze. Also, because retailers are not trained in standard response formats, analysts may be required to recode responses. During the pilot, this issue was most common on questions related to stock and sales, which require a numerical response – many respondents answered with a written number rather than digits.

PRODUCING INDICATORS

The process of data cleaning and analysis to produce key indicators should be as automated as possible. Some indicators may be a summary of direct responses (availability of a product), whereas others may require calculations (market value). Some examples of analysis that was useful in the pilot retail panel on condoms included:

- The total market volume and value, calculated by the average outlet's volume and value multiplied by the estimate of the total number of outlets stocking condoms (from the listing exercise)
- The average outlet's total value of condom sales across all brands and variants
- A list of all available condom brands and variants
- The average number of packages in-stock for each condom brand and variant
- Directly reported monthly sales in the previous month for each condom brand and variant³
- The average outlet's monthly value of condom sales by brand and variant, where value is calculated as sales volume multiplied by consumer price
- The average outlet's mean and median reported consumer price by condom brand and variant
- Market share by volume and value, for each brand and variant.

³ In the pilot a method of calculating monthly sales by combining past product volume, current product volume, and outlet intake and non-sales outtake during the same period was not found to be reliable.

4. DATA PRESENTATION

The objective of a retail audit is to generate information that is useful to multiple market actors to help them in decision-making. It is important to develop a strategy for sharing results with actors in the current market structure as well as those who may have a role in the future. Involving market actors in the design of the indicators may improve the value of the information collected.

IDENTIFYING AUDIENCES

The primary audiences for retail panels are market actors who need market intelligence to know where to best intervene and improve market performance. These could include: manufacturers, importers, and distributors, and may include public, commercial, or non-profit sector players. There are also indirect market players that provide supporting functions and enforce rules, like donors, governments, and global agencies. For example, guidance from WHO can influence manufacturers and importers for some products, while regulations on who can sell certain product types can affect distribution. Indirect market players maybe be a secondary audience, interested in the big picture but not in frequent updates.

To identify specific people and organizations with whom to share the results of the panel, start by plotting market players along the value chain for the product. It may not be feasible to engage with all the players; the next step is to prioritize those that would most benefit from the data and can be effectively reached within allotted resources.

WHEN AND HOW TO ENGAGE

Ideally, stakeholders would be engaged early in the planning of the retail panel, so that they buy in to the approach and can provide input on useful indicators. Teams should also seek their feedback on the following questions to so that stakeholders can understand and use the results:

- How do market actors plan to use it in their role?
- What is their readiness to act on the data?
- How do they want to see data portrayed?
- Which formats (e.g. in-person presentations, reports) are most engaging?

Even the most robust data does not automatically translate into insights. To generate useful insights, teams must know what their stakeholders wish to learn from the study, and then think carefully about analyses to run or external data sources to combine with the panel data.

A combination of in-person and written communications tends to be most effective – the former permits actors to “deep dive” into the data, ask questions, and provide immediate feedback, while the latter offers them a lasting reference. Packaging the data into both narrative and graphical formats will help stakeholders easily digest complex results and see how they fit into the larger market context. Teams should also anticipate stakeholders’ interest in accessing the raw data and prepare a data sharing plan to ensure secure and appropriate sharing procedures.

INTERNAL USE OF RESULTS

Implementing organizations (ie. commercial sector or SMOs) can also use the retail panel results in their own role as a market actor. The following are some examples of how this data could be used:

- Increasing coverage by identifying outlets where there are stock-outs or gaps in distribution.
- Tracking the impact of pricing changes at the distributor level on pricing through the value chain to consumers.
- Insight into brand performance, specifically tracking the impact of communications campaigns on sales uplift.

- Learning about the performance of competitors.

If the intent is to use data to assess performance of individual retailers, or to incentivize performance of wholesalers or retailers, this use of data must be disclosed during the initial enrollment to the study. However, using retail data to assess performance may require validating or triangulating results against other sources to ensure that results are accurate and interpreted within context, and to verify that incentives are not perversely motivating participants.

To guide action-planning based on the data, it is recommended to develop a 'Data-to-action' framework where you can identify the critical indicators that are most useful to follow, identify how these will be tracked over time, and lay out key decisions/actions that can be taken based on the results of the data. Once a retail panel is constructed and regular data collection has begun, it can be used as a platform for future data collection on the market, provided respondents consent to engage in these activities. Having this data over a longer period of time allows for analysis of trends, as well as opening new possibilities for evaluating the effectiveness of go-to-market strategies.

Examples of data use from PSI Mozambique:

1. Monitoring a price reduction campaign:

Jeito condom aims to be an affordable brand for lower-income consumers, however high trade margins in the retail environment were causing market prices to be higher than desired. The PSI Mozambique team implemented a consumer communications campaign with the objective of decreasing the recommended price to consumers. Using the retail audit panel, the team were able to monitor the market pricing of Jeito and they identified a price decrease of their biggest variant (J1) over the period – ensuring that the brand remained affordable to the target consumer.

2. Optimizing coverage across the market:

In order to achieve the highest health impact, Jeito condoms need to be available in as many places as possible where consumers are looking for them. The retail audit panel provided detailed information about where Jeito condoms were available across channels and neighborhoods. This allowed the Sales team to optimize and reprioritize the routes for their sales reps to address gaps in coverage across the city.

5. SUSTAINABILITY OF A RETAIL AUDIT PANEL APPROACH

The objective of a retail audit panel is to provide a frequent pulse on market performance – ideally monthly or quarterly. While this can be a cost-effective way to gather this data, resources are required over a longer period of time (rather than a 'dipstick' market survey).

The average estimated costs per survey round of a retail audit panel are presented in the table below. These costs are based on estimates from the Mozambique study and include in-country study implementation, covering labor, travel, contractual agreements, data collection tools and hardware, and dissemination packaging. They exclude common program costs for supporting the study affiliated with regional and global technical support, fringe, international travel, local and global other direct costs, and indirect costs. The range reflect the higher startup costs for earlier survey waves.

Description	Estimated cost by survey round
In-Person Survey	\$31K to \$47K
Mobile IVR Survey	\$3K to \$10K
Mobile SMS Survey	\$3K to \$5K

As this data has utility for a wide range of market actors, the ideal scenario is that multiple market actors group together to fund the retail audit panel over time (similar to how retail audits work in developed commercial markets). Working closely with stakeholders to engage early on the objectives and set-up of a panel can help to increase the usefulness for multiple market actors and increase the likelihood they might buy into future rounds. Furthermore, it may be possible to add additional products or categories to the retail audit panel which are of interest to a wider range of market actors (for example, adding oral contraceptives to a condom study). The only watch-out here is that adding additional products will increase the length of the survey, which may affect participation. This trade-off will have to be carefully considered.

CONCLUSION

We hope that this document has provided a useful guide in setting up retail audit panel to gather frequent market performance data in low-resource settings. Retail panels can be a useful data source for programs that are interested in market level data, although it is important that project teams assess the fit of this particular methodology for their data needs.

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