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# VIEWS

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## 2005 Conference Program Preview

Taking the Longitudinal Way...  
A Look at Qualitative Panels

Package Design in India

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# Taking the Longitudinal Way: A Look at Qualitative Panels

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**H**ow do we gain a deeper understanding of how consumer POBAs and behaviors change over time, or how they might be affected by the seasons or influenced by changing household compositions, household ownership, or employment situations? By designing and recruiting longitudinal qualitative panels, of course.

Mixing up the research activities and keeping panelists engaged is critical for creating successful longitudinal qualitative panels.



### A Longitudinal What?

A longitudinal qualitative panel (LQP) is a research design with two important characteristics. First, the same respondents who comprise the panel are measured during two or more points in time. Second, at least one variable such as cooking habits or shopping patterns is measured two or more times. This longitudinal aspect of the data allows for the measurement of qualitative change within the respondents.

Longitudinal research is especially well suited to understanding dynamic processes that can change over time. An LQP can provide a basis for breakthrough insights when the purpose of the research is to understand:

- Changes and adaptations in consumer behavior/attitudes resulting from more traumatic events (such as mergers and acquisitions or financial reorganizations) to softer events (such as new product launches, new product formulations, brand re-positioning, etc.)
- Changes in customer satisfaction and brand relationships before and after transformations of service offerings, customer service, etc.

Or LQPs can simply see how consumer behaviors and attitudes change according to season or “over time” when the research objectives call for a deeper understanding of behaviors under a variety of circumstances that can only be observed over a longer period of time. In this vein, we have found the LQP to be an excellent research design for the study of multicultural consumers in the U.S., where developmental processes such as acculturation, cultural affinity, and ethnic identity impact attitudes and consumer behavior.

LQPs are great for understanding any issue that is “fuzzy” and dynamic, such as:

- how people bank
- how people select produce
- the emotional benefits of product/service use
- what someone means by “good health” or “healthy children”
- how people establish and use a repertoire of brands in the same or complementary product category, or retail outlets and how their repertoires evolve
- how people see themselves in the world, among peers, and/or in their family
- the impact of trends on consumer behavior
- the impact of life events (marriage, divorce, babies, new jobs, etc.) on consumer behavior

### Practical LQP Design

As with most qualitative studies, panelists are recruited via screener. However, given the amount of time that researchers and clients will spend



with panel respondents—a typical LQP runs from three months to one year—it’s a good idea to think more critically about the criteria and to gather information you would not consider for participation in one focus group. Even if the screener becomes a bit lengthy, it will be applied only once, and it will be responsible for months of contact with the same people!

Once your recruiter has a pool of respondents together who meet the basic requirements, it’s time to begin screening via phone and then in person. Over the phone, the moderator can get a preliminary idea of the respondents’ willingness to talk, patterns of speech, whether they are forthcoming, or if the conversation is like pulling teeth. Whatever a standard articulation screen fails to catch can be assessed over the telephone.

In-person screening of the pool that’s already been narrowed through phone interviews is the next step. At this point, a moderator can get a good look at respondents and take them through a short guide to gather background information. While this can be done through IDIs, a dyad or triad affords a better opportunity to see how they’ll perform in groups, and it also helps when you are interviewing a large number of potential panelists. One of the key objectives of this meeting is to clearly define the panel study design and what’s expected from each participant, and to evaluate their commitment and ability to participate in the full length of



the panel (drop-outs can quickly turn a LQP into an ad-hoc tracking study). Special issues to be on the lookout for include changes in household composition (new arrivals or planned departures), employment, and ownership (buying new homes, moving).

If a panel is to consist of thirty subjects with five reserves, then it's best to have about forty to forty-five total in the initial pool, with even more desirable if no telephone screening is done by the moderator.

### **Practical LQP Maintenance**

Once your panel is fully recruited, the key to a successful LQP is maintenance—curbing attrition from the panel. This is typically done by making sure respondents earn a fair compensation for their time on a monthly basis but also by withholding a large portion of their total compensation until the panel is completed. It is also a good idea to mix monetary incentives with something that's fun and creates a sense of

anticipation, such as a raffle at the end of the LQP. Some of the prizes we have given away included computers, DVD players, and nice sets of pots and pans.

But there's more to it than money. Mixing up the research activities and keeping the panelists engaged is an important part of the successful LQP. Panelists need to participate in some research activity each period (monthly or bi-weekly), and the research company needs to provide clear, precise instructions on the various research activities. Research activities can run the gamut with an LQP: in addition to focus groups and in-depth interviews, panelists may participate in written, photo, or video diaries, observational research (cooking or shopping ethnographies, for example), kids' parties or peer groups, and more.

It is also important to create a sense of fun and belonging around the panel—asking respondents to arrive early, having plenty of snacks on hand for them to eat if they arrive straight from work, giving them a chance to socialize and bond, and conducting fun activities in the groups. The more comfortable they become with each other, the more they will let their guard down and open up in the research.

Some respondents, after a month or two, will say their monthly participation becomes like therapy, something they look forward to as they meet friends and have a chance to talk.

### **Practical Benefits**


There are many practical benefits to be gained in a longitudinal qualitative panel.

One of the more obvious benefits is the ability to mix research activities and methodologies. Although the panel is longitudinal, it is qualitative, and nothing says you have to do the same thing each period. You can conduct groups, dyads, triads, in-homes, peer parties, kids' parties, and observational research (watch them cook, shop, do the bills, bank online, change diapers, plan a vacation, etc.), and you can assign homework in the form of diary keeping (written, photo, and video) or consumer tasks. There is no limit to the number and type of activities you can plan (within reason and according to the objectives, of course).

Another benefit is having a real chance of correcting for reporting error, by observing actual behavior in the home or supermarket. Consumers rarely have perfect recollection of their past behavior, and we know they are not always perfectly honest. What respondents say in focus groups—for example, “I don't use much oil when I cook”—is relative to their own experience (and not the moderator's or the

client's experience). This becomes immediately apparent when in their kitchen you watch the subject pour a full cup of oil into the rice cooker.

Second, the chance for a moderator to ask so many different questions about so many varied topics tied to the research affords the chance to cross-reference answers and gain insights into the "whys" in a way that's not possible with a two-hour research group. For example, one LQP showed that moms' permissiveness regarding kids' snacks turned out to be seasonal. However, moms' seasonal attitudes had nothing to do with the

clients to quickly generate consumer insights on new products or marketing communication. Panels can also provide a lower-cost alternative to satisfy pressing qualitative research needs; respondents are already recruited and can be scheduled for additional qualitative research (not part of the scheduled panel research) at reduced rates. 

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weather, and everything to do with her predicament over how to keep the kids entertained and happy during summer vacation. Letting kids have what they want was one way Mom could negotiate summer.

A perhaps less obvious benefit is the remarkable rapport established between the researchers and panelists, and between the panelists themselves. This level of trust, especially amongst the panelists, cannot be developed in a typical two-hour focus group. Additionally, panelists can quickly move through the phases of team development—storming, norming, and performing—and become highly creative and productive research subjects.

Finally, successfully maintained LQPs are a great resource for the client during the period of research. As new things come up in the client's company, they can be run by the panel, making this an easy way for





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