

SETTING UP A Qualitative Research Panel

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The upside of a panel is a group of especially enthusiastic, articulate individuals who are knowledgeable about the subject and eager to share their opinions.

Your client approaches you about setting up a consumer panel ... now what? By definition, a qualitative research panel consists of individuals who have something in common with each other — e.g., they use the same brand, live a similar lifestyle, suffer from the same illness, etc., and they have agreed to meet at least semi-regularly, usually in focus groups, to discuss topics related to this common criteria.

Assuming agreement can be obtained from the original recruiting facility (often a feat in itself), panelists sometimes take part in additional activities such as internet surveys, chat rooms or public relations events. To show the company's appreciation to panel participants — and to tout to the trade the brand's involvement with its customers — one of my clients flew panelists to New York to meet with model/actress Mo'Nique, the spokesperson for the brand at the time.

Ideally, a panel is considered an additional tool, as opposed to a replacement for traditional focus groups. Because of their frequent interaction with other panelists and their increasing knowledge of the subject material, participants can lack the freshness and untainted perspectives that "regular" focus group respondents provide. However, the upside is a group of especially enthusiastic, articulate individuals who are knowledgeable about the subject and eager to share their opinions. Panels make the most sense for clients who have the budget and discipline to conduct on-going qualitative research.

Panel Advantages

- **Participants require no warm-up.** There is a timesaving element with a panel. Respondents come to the group discussion with a general idea of why they are there and what is expected of them. Often, many of the panelists have met in previous groups. Energy and comfort levels are typically high, and the discussion takes off immediately.

- **Panels attract committed respondents.** Panels can help clients more intimately understand their users and identify unmet needs. As panelists become familiar with each other and increasingly confident that clients really want to hear what they have to say, confidence and creativity often increase. Panelists evolve over time, frequently becoming increasingly vocal to make certain that their opinions are being heard. Those chosen to participate on panels are often eager to gather again. Recruiting panelists for subsequent focus groups is typically easy and fast, with an extremely high show rate — often 100 percent.
- **A panel provides a baseline.** Panelists don't walk away at the end of a focus group and disappear forever. The standard rules of past participation — usually no participation in any focus groups within the last six or twelve months, and never in the category — do not apply to panels. Rather, clients can go back to the drawing board and then revisit these same individuals. Follow-up sessions help clients assess how product developments, prototype changes, advertising tweaks, etc., measure up to the direction provided by panelists in earlier discussion groups.

Panel Disadvantages

- **Panels are high maintenance.** As opposed to a focus group that is over in about two hours, panels require constant maintenance and at least semi-regular contact. Panelists' enthusiasm and commitment are largely contingent upon on-going communication. If too much time passes between interviews, panelists wonder if they have been dropped, or they simply lose interest.
- **Panels are decreasingly representative of average consumers.** There is some skepticism as to whether seasoned panelists who have participated on a certain panel for an extended period of time truly reflect average consumers. Panel participants may start to see themselves as authorities on a given category or product, with some acting more like marketers or consultants than average consumers. Setting a limit on the number of times a panelist can participate helps keep this issue in check.

Guiding Principles

Be Upfront with Facilities

The word “panel” sends up a red flag with many facilities, and justifiably so. In an effort to protect their respondent databases, facilities make it a point to assure respondents that they will not be contacted with sales pitches or other forms of solicitation from third parties. Unfortunately, some less-scrupulous clients have violated this pact by contacting respondents directly, with neither their nor the facility's permission. As a result, some facilities now refuse to release respondent contact information for the purpose of establishing a panel or anything else.

It is the moderator's responsibility to ensure that owners, project directors and any other key decision-makers at the facility are aware of your intent to establish a panel. Project supervisors may not always be on board about the facility's policy regarding panels.

I once had an unfortunate situation where the owners of a facility descended upon me at the end of a group — after the women had been invited to be part of a panel — and refused to allow “their respondents” to be panelists. It became readily apparent that the facility personnel involved in the original project bid process were either unaware of the facility policy regarding panels, or they had failed to share the panel aspect of the recruit with their management. Now, I always make sure that facility management knows early on that some of the respondents may be asked to participate on a panel. Keep in mind that you need to remain with the same facility that does the original recruit, for as long as you want to continue talking with these same panelists.

Consider Alternative Language

When asking facilities to bid a panel project, I try to be clear on intent but avoid language that is threatening. Terms such as “brand advocates” or “consumer consultants” may be preferable since “panel” is innately controversial for many facilities. An explanation to the facility may be as simple as the following:

“At the end of the group, we would like to ask some of these women if they are interested in becoming Brand Advocates and participating in additional research for this brand — at your facility, of course. We will give you a list of these women before we leave so you will know whom to schedule for future groups.”

Get It in Writing

Consider a written agreement between your client and the facility, stating that all contacts with respondents (unless otherwise stipulated) will be through the facility. Ask panelists to sign an agreement that gives permission to be contacted about issues related to the panel. This document should include specific information about how respondents agree to be contacted (i.e., email address, phone number, etc.). After panelists have been selected and agree to participate, give the names of these respondents to the facility, reminding them that they will be asked to contact these individuals in the future.

Building a Panel

Know Who You Want

You and your client need to be clear on the purpose of the panel. For example, is the client seeking brand loyalists, competitive users who have a history of brand switching, adamant brand rejecters, etc? In addition to general-usage criteria, there may be attitudinal or psychographic considerations. Some panels include an attitudinal or experiential profile in screening. One of my intimate-

apparel clients likes to include women with a variety of attitudes towards buying lingerie — e.g., they love shopping for it and usually find what they want; they love the category but can't find pretty lingerie in their size; they buy primarily for comfort, with less attention to appearance; etc.

Show Me

Require proof that recruits are who they say they are. Consider contracting with a company that does telephone-number checks to weed out "professional" or repeat respondents. If respondents mislead the facility about past participation, they may also be untruthful on a panel. Ask respondents to bring in something tangible to ensure their credibility (i.e., the product itself, a photograph of them using it, etc.).

Focus Groups as a Panel-Screening Tool

I suggest a series of 90-minute to 120-minute focus groups to screen for panelists. Spend about an hour or so on a topic that is important to the client. This allows a chance to evaluate the respondents in terms of their ability to articulate their thoughts, how they interact in a group situation, whether they seem to think independently, attitudes toward the product or brand, etc. After the general discussion, briefly visit with the client in the back room to discuss which respondents to invite to be panelists. Ask those respondents to stay for a few additional questions and (diplomatically) release the others. Extend invitations to participate, ensuring that respondents know they are under no obligation or pressure to participate.

Homework

Consider a homework assignment, such as having respondents prepare a collage or complete a product-usage diary. In the first screening focus group, ask respondents to present their homework as a means of introducing themselves to other group members.

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How they approach the assignment, and their ability to present it, is likely indicative of the quality and level of involvement you can expect from them as panelists.

An exercise that has proven beneficial to me is to have respondents prepare a collage that reflects both themselves (personality, lifestyle, values, aspirations, etc.) and their relationship with the brand. In addition to providing insight into respondents' lives, a homework assignment can help signal a red flag that a person is not a good fit for a panelist. For example, if a brand's mantra is "apparel for larger women who accept their size and feel good about themselves," someone who is focused on dieting and scornful of herself and other larger women is a weak candidate for the panel, even if she uses the product frequently.

Be Selective

Keep in mind that if the process works correctly, you will spend a lot of time with these panelists. Personality may be somewhat more important when establishing a panel versus in a standard focus group. Do not invite someone to join the panel if you or your client cringes every time the person speaks. I also avoid individuals who, for whatever reason, seem to stifle other respondents.

Limit Frequency of Participation

The best way to keep from having a panel of self-professed authorities is to limit the number of times each panelist is allowed to participate in an interview. Four or so times seems to be a good rule of thumb.

Re-screen

Panelists' habits and attitudes may change from the time they are originally recruited. We need to continue to monitor usage dynamics and other screening criteria. To be honest, this practice sometimes works only in theory, as panelists can often guess what screening criteria qualify them.

Maintain Contact

It really is necessary to keep ongoing contact with panelists over time — e.g., through a survey, sending product, etc. Without consistent contact, panelists become unenamored, and they may question the legitimacy or importance of the panel. Conversely, even minimal contact on at least a semi-regular basis helps respondents know they are appreciated and that their opinions really count, and it increases the likelihood they will stay involved. 📧

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