

# Predicting the Future of Consumer Panels<sup>1</sup>

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# Predicting the Future of Consumer Panels

*“I think there is a world market for maybe five computers.”*

--Thomas Watson, Chairman of IBM, 1943.

There is an embarrassing danger in trying to predict the future. Yet the upside is often worth the embarrassment of inaccuracy. When we try and imagine what the future will bring, we bring possibilities into focus that could otherwise be lost.

The future for consumer panels is rich. The data collection experience will be richer for consumers, and the data will be richer for researchers. The challenge will be in determining how to use this data to improve a manager’s understanding of his or her consumers. A mountain of data will not be difficult to collect. The difficulty lies in effectively mining that mountain for the gold it contains.

Technology will not only influence the way in which data is collected, but it will also influence the sociology of how panelists, researchers, and managers respond to this data. After offering predictions of how the future will make the data collection experience more rich for consumers and for researchers, we will discuss future fears. These fears – or challenges -- revolve around the unexpected consequences this technology has for the researchers, for brand managers, and for the privacy of panelists. Following this, specific recommendations for consumer panel users and researchers are outlined. These

recommendations are not so much intended to help us control the future as much as to help us be best prepared for the changes that might occur.

## **Predicting the Future: Richer Experiences and Richer Data**

To believe consumer panels of the future will only be in the form of web panels is probably no more accurate than someone in 1978 believing that music of the future would be in the form of 8-track tapes. Consumer panels are now conducted in person, on the phone, through the mail and on the web. The future of consumer panels may be shared with panel data that is collected on re-writeable compact disks, refrigerator panel displays, smart voice-activated appliances, video conference calls, personal displays, or on high-resolution WebTV. Figure 1 illustrates the future of consumer panels and the organization of this article.

[Insert Figure 1 about here]

### **A Richer Experience for Panelists**

**Increased Personalization.** Forthcoming waves of increased interactivity each carry the potential for increased personalization. Just as panels have used fictitious representatives, like Janet Hall, to give personality and a contact point to their company, so too can they use the pleasurable voice of the virtual hostess to welcome consumers and talk them through their panel experience. Not only can this virtual hostess provide explanations and clarifications, she can also reinforce a perceived degree of personalization (“Thank you, for helping us, Naomi.”).

Because of cross-referenced data bases, fewer questions will need to be asked and others can be more confirmatory (“Do you still drive your white Jeep Cherokee?”). For some panelists, attrition occurs because they feel anonymous or unimportant. In a small way, this ability to “reference and reinforce” will make the panel experience more personalized and more efficient. The objective is to reference those details that show familiarity with the panelist and reinforce the notion that a panelist’s answers are important and they are remembered. It may be a fine line, however, between a panelist believing that “it’s nice you remembered that about me” versus “it’s unnerving you remembered that.”

**Smart Appliance Panelists.** The Command Center of a household is the kitchen, and it is likely to be one of the most promising frontiers for panel research. It’s where people start the day, gather, take breaks, regroup, and finish off with a midnight snack. With smart appliances, such as refrigerators with touch-screens and stovetops with microchips, there is an opportunity to use bar coding scanners to move beyond purchase behavior and to collect more precise data on consumption and meal planning. Flat panel LCD touch-screens on refrigerators (which are also voice activated) allow consumers to keep track of their inventory by scanning products, and they allow consumers to make lists, to order groceries on line, to send e-mail, to check recipes, to get cooking advice, and to program and watch TV. Just as in-store scanners enhanced our understanding of shopping behavior, smart appliances will enhance our understanding of consumption behavior.

The initial benefits of smart appliances are in how they enable consumers to maintain better inventory control, and how they help with meal preparation. Using the scanner, a wired refrigerator can provide researchers with unobtrusive measures of what is being consumed and when it is being consumed. Furthermore, because smart appliances

can provide advice to consumers on their screens, it provides some idea of what recipes a person considers and when they make a meal choice based on a theme (Italian) versus when they make it by building a meal around a key ingredient (thawed ground beef). As inventory is depleted, automatic shopping lists will suggest repurchases that need to be made. When combined with purchase data that is collected from either the store or from inventory check-ins after returning from the store, questions can be answered about why and when purchase rates lag so far behind consumption or “use up” rates for many products.

In networking smart appliances together, there is a tremendous potential for observing cooperating panelists. For instance, the same surveillance camera system that allows a mother in a kitchen to monitor her sleeping baby in an upstairs bedroom can also record how she is preparing food and the order in which meal preparation decisions are made. With the refrigerator serving as a cortex, it will not be long before it becomes networked with smart telephones, ovens, toasters, televisions, garbage cans, and heating and air conditioning units.

**A Virtually Real Experience.** The panel experience will move from pictures and sound, to slides, full-screen video and product dimensionality. Furthermore, while WebTV and computer monitors are limited to two dimensions, there advances in holography and a variety of innovative peripherals which could alleviate even this constraint. Consider an experiential walk-around that involves interacting with a product, not unlike that which one sees in an interactive first-person experience with Playstations and other simulated reality games. With discontinuous access panels, consumption, attitudes, and intentions can be vividly collected for existing products, for new product introductions, and for new package concepts.

The power of simulation will provide a greater degree of specificity to the web. No longer will questions be general,<sup>2</sup> but they will be able to be ask questions of the panelists in a vivid, situationally--specific manner. The experience can be varied for people based on key segmentation variables, such as their age, or the age and genders of their children, and so forth. Their experiences can also be varied systematically to provide modal tests, such as 2x2 experimental designs that vary consumption-related scenarios in four systematic ways and then compare the different responses in each of the four conditions.

### **Richer Data for Panel Researchers**

**Hearing Voices and Coding Thoughts.** One historical drawback of panel data is that it was not effective in providing qualitative explanations of behavior. Most conventional questionnaires do not allow the space, and time and cost considerations to collect this data or to code and interpret it. The integration of two technological advances will solve this problem.

First, voice-activated surveys free panelists from having to write or type their responses. This – in turn -- saves them time and effort and allows for more questions to be asked. This voice recognition software allows consumers to complement or supplement their quantitative responses with qualitative verbal information. They can then explain the

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<sup>2</sup> Attitudes toward products, for instance, are not general. They are specific to products in specific situations. Asking a person's attitude about eating cranberry sauce for Thanksgiving dinner yields a much more positive attitude measure than eating it for an weekday dinner or with chicken.

process they went through when deciding on a purchase or when making a trade-off.

Furthermore, voice-recognition software will allow panelists to describe the thoughts and feelings they had when using a product, seeing an ad, tasting a product, or comparing four package designs.<sup>3</sup> This information can help determine causality and generate insights.

These verbal protocols will be worth nothing, however, if they are not organized in a systematic way that enables analysis. Fortunately, advances in new generations of qualitative software will continue to help transform this data into a usable systematic form. This software can be used to code data in a number of ways. For instance, when capturing a person's thoughts and feelings toward using a particular product, each statement can be categorized as to whether it is a positive or negative comment, and on whether it is a general evaluative statement or a more attribute-specific statement. The exact nature of each statement can then be subcategorized based on the attributes they reflect.

**Cross-country Coordination.** “Smart databases” will facilitate a researcher's ability to develop a global perspective. These automated databases will be able to search out a stratified or diversified panel, including one consisting of members from many different countries, for each survey.

The databases will be supported by an increase in the availability of instantaneous language translation programs that allow an unprecedented opportunity for cross-country comparisons. When there is a desire to make comparisons across languages, translation software will make near instantaneous conversions of a panel survey in to other languages.

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<sup>3</sup> When measuring verbal responses, the general wording for the questions eliciting these responses is “Please describe in your own words the thoughts and feelings you had when after \_\_\_\_\_ (seeing this ad for the product, using this brand, comparing these two new package designs, etc.). It is important to understand there are do right or wrong answers. We are interesting in the thoughts and feelings you have, so please do not worry about your grammar or about speaking in full sentences.” These directions can also be given in a more

This software will offer backward translation to double-check meaning (e.g., from English to Mandarin back to English). Furthermore, the same voice recognition software that enables qualitative responses to be given will also allow words to be translated and coded in to whatever language is desired.

These advances will more quickly bring global markets together in to one heterogeneous, but coordinated market. Our understanding of the diversity of these different groups will increase, and our ability to provide recommendations and to understand why they differ will help companies better satisfy them while also enabling them to keep their identity. In this way, the global potential for certain products can be assessed early in their development. Changes can then be made to the product that make it most promising for a world market, or which makes it customizable by different panelists in different markets.

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guided manner toward specific types of thoughts, and there are pretesting methods that can be used to insure such wording does not bias or guide panelists (see Wansink, Batra, and Ray 1994).

## **Future Fears and Opportunities**

Science fiction movies and books are replete with the theme of technology outpacing man's ability to control it. The future brings the ability to collect more and better data and to make the panel experience richer and more satisfying for the consumer. It is less clear if we will know what to do with this data once we have it.

One concern is that the focus on cost and speed will lead to the death of answering "Why?" When a person is not trained to get behind the numbers, the marginal benefit of sophisticated data will not commensurately add to his or her ability to make more insightful decisions. Perhaps the core of the problem is in how we train graduate students, particularly the MBAs who use panel results in positions as Brand Managers. MBAs are trained to see the "big picture" and to develop vision. This often subjugates technical skills in favor of strategic thinking and team management. Yet at some point, it is insights about consumers that comprise the mosaic behind the big picture of successful companies. Learning how to run regressions ANOVAs, and Chi-square tests can be reasonably easily taught. The value in doing so, however, is in being able to ask the next level of question that moves from numbers in a table to insights. Is the purpose of research to merely to describe the data, or to tell a story? Is it to "tag and bag," or is it to solve a mystery? We do the former, not the latter.

## **The Commodification of Research**

Research costs have been increasingly dropping as the use of the web and standardized procedures reduce the time and labor necessary to execute a study. Yet, the same aspects that make on-line panel research so efficient also make it prone to commodification. When the positioning statement of an on-line panel company is “we’re faster and cheaper,” that will unfortunately be the yardstick they will also be evaluated on as other on-line competitors emerge. Higher speed, lower costs, and lower margins will have a predictable impact on quality. As one sign in a computer consultant’s office reads, “Cheap, fast, and good: Pick two.”

If the incremental value of a panel researcher is not made clear by that researcher, clients might overweight cost and speed. That is, a client might find himself price-shopping for 8 cross-tabs he or she wants on a specified population of a prescribed size. Having articulated this, it is now time to find the lowest bidder.

Such technology will commodify the panel research industry. No longer will there be a premium on being a firm which goes beyond the numbers and provides insights or explanations that move one’s understanding of consumers to another level. To a low-bidder, there is no time for thoughtful analyses. The costly hiring of people who are talented and clever enough to generate these insights will be foregone in favor of a less-expensive technician who can click a “cross-tabs” button. This will drive out much of the diversity in the marketing research area in favor of large low-cost suppliers.

Low cost panel research may often be worth even less than what one pays for it. In contrast, users who pay a premium price, deserve more. There is no shame in asking a panel researcher what value-added benefits they provide beyond simply the basic findings their “generic” competitor offers. This makes sure users get their money’s worth. It also pushes

that provider to hire better, look deeper, and to continue to develop the analytic expertise that will keep them competitive.

The progress in any industry is never linear. This is also true with consumer research. Some techniques and some companies move our understanding directly forward, other techniques take us on a creative side road, and others make us back-step and rethink our progress. But if the widespread decision to select a vendor is based only on speed and cost, the progress in this industry and our advancement will become dormant.

### **Rationalization Research and Marketing Schizophrenia**

There are two dangerous extremes of the research continuum: Under-responding to research and over-responding to it. The first leads to rationalization research; the second leads to marketing schizophrenia.

**Rationalization Research.** Consider the danger of under-responding to research. Over \$6 billion is spent each year on professional marketing research. A sizable amount of this is devoted to justifying, fortifying, or rationalizing a business decision that has already been made and which now needs to be supported with data. As the cost and speed to ask questions goes down, the temptation to ask more rationalization-related questions goes up.

When research is so easy to conduct, what keeps it from being commissioned and decommissioned until results fit expectations, and it comes out the way in which management wants? Under such circumstances, there will be little trouble and little cost to re-commission it, and “send it back until it is ‘right.’” In the end, the casualness by which

one commissions studies will be matched with the casualness in which one regards the results.

**Marketing Schizophrenia.** Now let us consider the opposite danger—that of over-responding to research findings. Brand managers often look for instantaneous change, and the convenience and affordability of on-line research can nearly instantly satisfy this curiosity. Yet, continuous data may lead to continuous change. Too much change can lead a manager to lose sight of who they are and what their products stand for.

Consider continuous tracking in political polls. Small changes in public opinion create corresponding changes in political strategies. But brands are different. Part of what makes a brand or company valuable is that it stands for consistency in quality and in image. Many of the most powerful brands – Marlboro, Coke, Federal Express – seldom strayed from their image. When brands change their images with the changing of every new brand manager, they leave a confusing or schizophrenic impression in the eyes of consumers.

Just because data is available does not mean it has to be continually accessed and acted upon. “Stay the course” is unfortunately a foreign phrase to many brand managers. The fear of staying the course is often related to the fear of being left behind and becoming a forgotten manager of a forgotten product. While it is good to make midcourse corrections to stay with changes in the winds, there is often a tendency toward overcorrection. Large companies tend to dampen out what might otherwise be a manager’s tendency to over-respond to the data. Yet even if a company can save a person from their own best intentions, it is important to acknowledge a tendency to this bias.

The accessibility of continuous on-line information brings with it the warning to resist making continuous changes that correspond with the continuous change in attitudes.

The key is knowing what changes are worth responding to and which are not. That is why “Brand Stewards” have a different career trajectory than “Brand Administrators.”

### **Privacy and Regulation**

Underlying all of these methods and the techniques for their collection is the ever-present danger that a person’s responses can be stolen or abused (Baculski 2001).

Publicized attacks of online systems of the CIA, FBI, Microsoft, and other organizations by hackers have not reduced the public’s unease regarding the security of the personal information they give to marketing agencies and web-sites.

With new developments in personal encryption, the use of personal ‘keys’ to enter information online, and the practice of sending respondent’s answers as packets of information instead of a unified whole, the hacker is having a harder time making this type of data meaningful or relating this information back to the respondent. The infinite routes that data travels along the Internet today make even the best hackers practically harmless to the research respondent.

While some believe security will be a less sensitive issue in the future, many do not. In the end, the future of panel research rests on the shoulders of consumers. They are one asset with which we can not gamble.

Originally, the FTC held a stance of industry self-regulation. Identifying five core principles that they would like the industry to follow was the first step to a structure, or set of guidelines, for federal regulation (Gillen 2000). The FTC offers five principles of fair information practices that should be followed:

1. **Notice.** Communicating how data is collected, the uses of the information, as well as what third parties may receive the information.
2. **Choice.** Giving consumers options as to how any personal information collected from them may be used (opt-in or opt-out).
3. **Access.** Allowing an individual the ability to access data about themselves and to correct any inaccuracies.
4. **Security.** Taking reasonable steps to ensure the security of information collected.
5. **Enforcement.** The core principles of privacy protection can only be effective if there is a mechanism in place to enforce them.

Increasing regulation is imminent if companies and Congress do not see eye to eye.

While it should not be necessary to make new laws regarding this medium, education is vital if marketers and researchers want to continue the relationship and trust of the public that they are so eager to analyze. The ability to “reach out and touch someone,” brings opportunities and responsibilities. While we can assume the best intentions, we must guard these systems against the worst.

## **Recommendations for Future Consumer Panel Researchers**

No competitive advantage lasts for ever, particularly in a service industry. As soon as a new tool is developed, it is only a matter of time before it is replicated and improved by competitors. Nevertheless, the pioneering advantage does have enduring benefits and halos – one of them being financial solvency. The basic theme of this section is that innovative thinking will be one of the biggest assets of the future. Innovative thinking is based on

developing the ability to ask and answer “Why?” and on the ability to envision and develop new products.

### **Asking and Answering “Why?”**

One off-putting but illustrative description of what differentiates insightful researchers from less insightful ones is that insightful researchers are able to “beat the data until it confesses.” This underscores one way that a number of great researchers have learned how to generate insights. It is the iterative three-step process of going from data results to head scratching to data analysis until the picture is clear and the “why”s are answered. Insights from a data set are not found in the first 8 sets of cross-tabs conducted. The real value might be in explaining why certain segments differ than others.

“Beat the data until it confesses.” What you want it to confess is “why.” For instance, you may want it to confess . . .

- Why do people with shopping lists make more impulse purchases?
- Why do people buy multiple units of products that aren’t on sale?
- Why is restaurant patronage decrease except for expensive restaurants?
- Why would someone who says they “Buy American” own a Japanese car?
- Why do people buy products they never use?
- Why do women like unhealthy “comfort foods” and men like healthy one?

Research analysts can become accustomed to analyzing data in prespecified, preformatted ways, but this efficiency can also cause them to lose the ability to look deeper in to the meaning behind the results. While many researchers begin to get a flavor for

asking “why” and “why not” in their graduate training. If their day-to-day responsibilities do not develop this, the skill is lost.

### **Educating for Insights**

It is important to educate analysts to dig deep and look for insightful ways in which to better understand the “why”s behind the data. There are at least two ways this can be done. One is through theory-based education; the second is through data-driven insights. The first is top-down, the second bottom-up.

**Theory-based Education.** Theory-based education is built on the belief that the best insights behind how consumers behave can be derived from basic models about how they think. That is, having even a handful of basic models of how consumers make decisions, or how they shop, or why they eat what they do can be used to stimulate questions, insights, and analyses that are relevant to a client’s basic Monday morning problems.

While theory-based education can be accomplished through high-level graduate courses in psychology, sociology, and consumer behavior, it can also be done through in-house programs. One common version of this is in the form of “journal clubs.” Instead of simply “keeping up with the trade press,” the purposes of journal clubs are to push thinking beyond day-to-day needs and to stretch people into thinking outside their comfort level.<sup>4</sup>

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<sup>4</sup> A number of companies support Friday afternoon journal clubs. One form these take is a weekly box-lunch affair where one journal article has been pre-assigned for reading and for discussion. In the fall and in the spring, a group of 6- 10 individuals scans academic journals for articles that might be of interest, and they

This increases one's comfort and skill in asking and answering "why" questions. One way to encourage this is to try and build process-related models that force researchers to draw arrow and bubble diagrams or flow charts that cause them to think about why consumers behave the ways they do.

**Data-Driven Education.** Instead of, or in addition to, using theory-based education to generate insights, data-driven education can also be used. This is more difficult to structure, but can be done in the form of data-driven mysteries. Each week's discussion is led by a different researcher. Their objective is to present a data-related mystery they faced on a prior project and subsequently solved. By walking other researchers through the experience, it provides a case-study opportunity to look beyond the numbers and to ask "why" questions.

This can be in the form of a presentation, but data-driven education appears to be more effective (and more enjoyable to the participants) when it is limited to a minimal number of slides and a good deal of give-and-take discussion. Because the goal of such a process is to put analysts in the shoes of the person leading the discussion, there are a number of ways the discussion can be structured. One way is for the discussion leader to present only the background and importance of the research, then to present the dilemma, and then to open it up for discussion as to how and solve the dilemma. People can not just casually throw out half-thought out suggestions. They must explain their reasoning and the assumptions behind their suggestions. It is important that the whole group be involved in discussion and in converging on the solution. It is only toward the end of the session that

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agree upon one for each week. Articles are scheduled and discussion leaders assigned. The responsibility of each discussion leader is to assign reading-related questions, to direct the discussion, and to provide a one-

the actual results are revealed. After discussing the results, it is a productive to ask two questions: 1) Who else has faced a problem similar to this, and how did you solve it? and 2) What are you working on, or have you worked on, where this technique might be useful?

Consider the following example:

Background and Importance of Research. Knowing what types of measures best predict one's consumption of a packaged good like canned soup, gelatin, or cranberry sauce would be useful. These sorts of products are often stockpiled, and typical measures of purchase intentions do not capture the true impact of an ad. That is, an ad might stimulate someone to want to eat soup, but they will eat a can from inventory instead of immediately buying a new one. For this reason, it is important to know what type of measure of consumption intention best predicts subsequent consumption.

Data-related Dilemma. In designing the panel research, there were two types of consumption measures that were taken for a number of products. These were consumption likelihood questions ("How likely are you to consume canned soup in the next two weeks?" 1=unlikely and 9 = likely) and consumption quantity questions ("How many cans of soup do you think you might consume in the next 2 weeks?"). A second wave of the panel asked them for the actual consumption of these products along with the three target products we were interested in (soup, gelatin, and cranberry sauce).

Which measure best predicted actual usage? Herein lies the dilemma. Neither consumption likelihood measures, nor consumption quantity measures correlated with actual usage. The correlation with the first was .04, and -.07 with the second.

Rationale for Possible Solutions to the Dilemma. In solving this mystery, it is important to understand that these two different measures of usage intent have different relative strengths. With infrequent users of a brand, volume estimates will be skewed toward 0 units (especially over a relatively short period of time). This is partially a drawback of numerical estimates that provide no gradation between 0 and 1 unit. In such cases, volume estimates would provide less variance and less information than an estimate of usage likelihood. As a result, usage likelihood estimates would allow a greater gradation in response and would be more sensitive in detecting any potentially different effects these ads might have on usage.

In contrast, with frequent or heavy users of a brand, a volume estimate is likely to be more accurate than a likelihood estimate. This is because the distribution of these volume estimates is more likely to be normally distributed.

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page summary of the insights and implications of the discussion by the following Monday. With some companies, these summaries are distributed through the relevant departments.

As a result, a volume estimate of one's usage intent is likely to provide more variance and more information about the intended usage of heavy users than is a likelihood measure, which would undoubtedly be at or near 1.0 (100 percent probable). Under these circumstances, volume estimates would be a more accurate estimate of a heavy user's usage volume of a brand.

Reanalysis of Data to Test Possible Explanation. For heavy users, an intended usage volume measure was correlated a respectable .60 with actual usage. For light users, a usage likelihood measure was correlated .47 with actual usage (Wansink and Ray 1992). This was much more diagnostic and useful than the aggregated results that were first found.

This illustrates one example of a data-driven form of education. It began with an important context in which there was a data dilemma, inconsistency, or mystery. Following a discussion – possibly even a series of “yes” and “no” questions -- a general hypothesized theory about consumers is developed. The last part of the discussion is the outcome of the reanalysis – the solution. The more interactive data-driven sessions are, the more effectively they are burned into the minds of the researchers.

### **Develop These Breakthrough Products**

Despite no competitive advantage lasting for ever, innovation is the backbone of most service-related companies. Three areas that are ripe for progress are in developing user profiles, determining consumption clusters and preference affiliation, and in connecting web browsing with behavior.

**User Profile Analysis.** When trying to facilitate the adoption of a product or behavior, it can be useful to know how segments of current users of the product differ psychographically, behaviorally, or attitudinally from segments of nonusers. Having this

information can help identify predisposed segments in order to precisely target them. For instance, knowing the ways in which consumers (“users”) of soy products differ from nonusers helps to more precisely determine the types of soy-related products that will be most successful to these segments and how these products need to be positioned.

Attempts are also being made to determine the extent to which media preferences – primarily in the form of magazine subscriptions – can provide personality clusters that predict consumption preference across a wide range of products. While it may not be surprising that a person who subscribes to *Architectural Digest* is more likely to buy a luxury car than a reader of *TV Guide*, it would be useful knowing if other magazines this person subscribed to will help predict the type of luxury car he or she would buy, (even before the person themselves knew).

**Consumption Clusters and Preference Affiliation.** The Internet has brought about an ability to track consumer search patterns and purchase preferences across a wider range of product categories and services than ever before. This volume of data provides a range of possibilities to understand consumers based on the clusters of products they prefer and purchase. These preference affiliations are a target of interest for academics who want to see the extent to which preferences in one category can predict preferences in other categories.

Recent studies of heavy users of consumer packaged goods have examined what personality variables are correlated with heavy usage of a particular brand or category (Wansink and Park 2000). By cross-correlating this with heavy usage in other categories, researchers can determine why these particular personality variables drive brand preference and category usage.

**Web Browsing and Purchase Predictions.** Many believe that correlating web-surfing behavior with long-term behavior will be the Holy Grail for web-based researchers and managers. Yet without brilliant, theory-driven analysts, even the most powerful software will yield few surprising insights. The relationship between web surfing and buying behavior (or preferences) is likely to be either so painfully obvious it is not interesting (e.g., people who frequently visit fishing-related web sites are more likely to buy fishing gear than the average person), or so subtle that the potentially interesting or useful relationships are invisible. If most of us were asked how the web influenced our behavior as consumers, it is not clear we could even point to direct influences. Perhaps this is because the effects are so ubiquitous we, like the fish in the water, cannot see them. Or perhaps the effects are so subtle that any attempt to try and explain them will be an exercise in futility. The challenge here is knowing what to look for . If we do not know what to look for, we are unlikely find it. Nevertheless, new researchers will be in a better position to correlate web behavior with off-line buying behavior than panel researchers.

## **Summary**

Indeed, the future for consumer panels is rich. The data collection experience will be rich for consumers, the data will be rich for researchers, and hopefully the value will be rich for managers. It is important to remind ourselves that the value a consumer panel has to a manager is part in the availability of the data, and part in its usability.

Much of the future of panel data research and the questions that can be answered is limited primarily by our creativity and by our vision. It is seductive to see the future as technology. What is important to remember is that our greatest assets are the consumers who comprise our panels and those researchers who ask and answer “Why?” While we can sometimes become mesmerized by the gleam of technology, it is important to not lose sight of the fact that people – panelists and researchers -- will always be the core of what drives the value of panel research.

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**Figure 1**  
**The Future of Consumer Panels**

