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# IHUTs

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Your Plain Language Guide  
to In-Home Product and  
Package Tests



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## What is an IHUT?

This acronym refers to “In-Home Usage Test.” It is a marketing research methodology that involves offering a (usually) free product to people to use and assess in their own home. It could be a full-size or a small sample size version of the product.

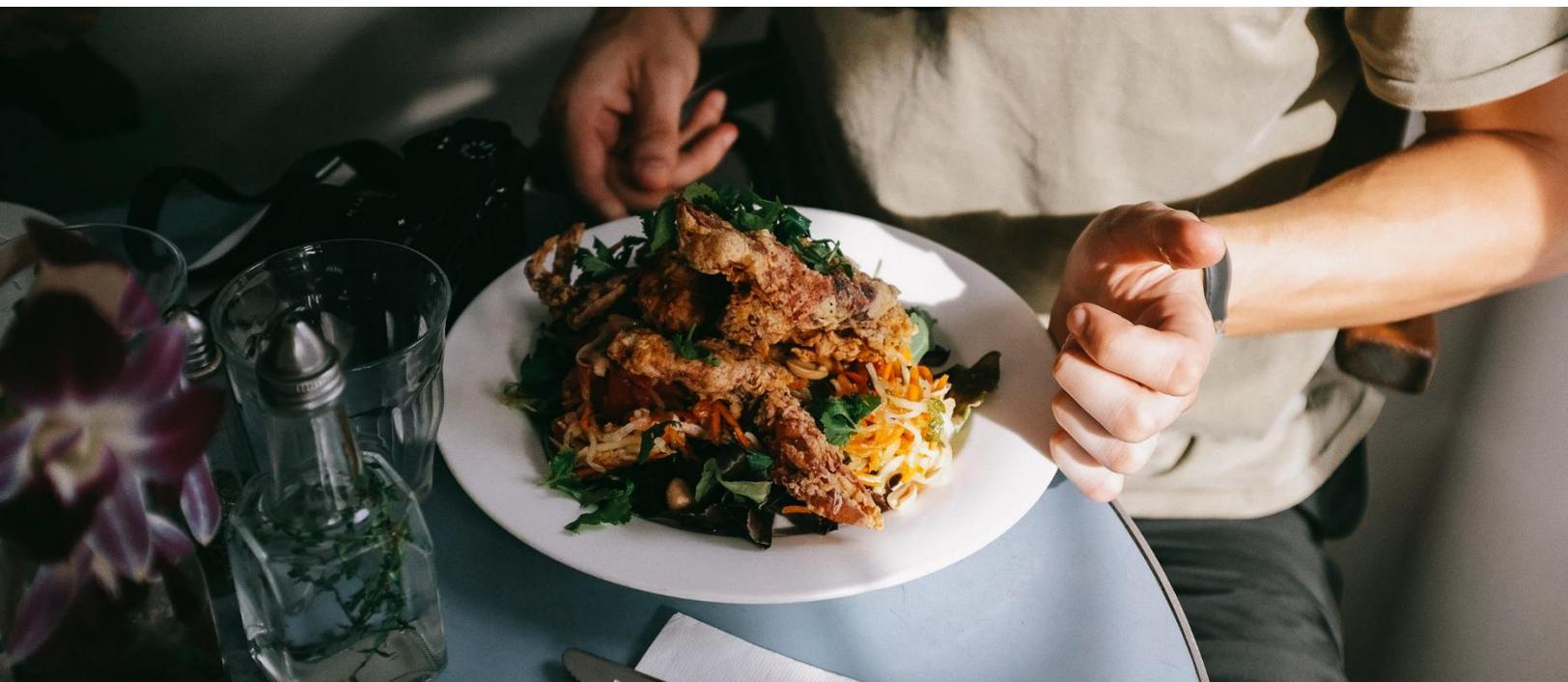
## Why use an IHUT?

Researchers, marketers, and brand managers use IHUTs to gain a better understanding of how people use products in their own homes and away from the artificial environment of the research testing facility or laboratory. The methodology helps them learn more about consumer opinions before an expensive, full-scale market launch. Properly used, IHUTs can help prevent a launch from failing.

IHUTs include both a physical use of the product or package as well as a formal evaluation of it. As part of the physical use assessment, participants might be asked to share in-the-moment photographs and video of who, what, how, and where the product is used. Those photos and videos will focus on use of and reactions to the product, both positive and negative, and help the researcher peer unobtrusively and with permission into the personal lives of people.

In terms of the formal evaluation, IHUTs are usually combined with a questionnaire, whether on paper or digitally, to quantitatively measure first impressions, likability, product satisfaction, purchase intent, and various other relevant metrics after the product’s first use. Sometimes, this assessment will also take place a week or a month later to determine whether opinions have remained static or changed after additional uses.

These quantitative surveys generate insights about the product overall, as well as very specific features of the product – opinions about taste, touch, scent, sight, and sound. Thus, was the messaging on the package easy to understand? Was the package easy to open? Did the food or beverage have a sweet, salty, sour, bitter, spicy, oily, or starchy taste? Were each of the product features easy to find, understand, and use?



## **Advantages of IHUTs**

Researchers have many tools available to them including focus groups, interviews, large-scale questionnaires, communities, facial coding, and more. Why would they choose an IHUT? It always depends on the research objective. When the opportunity suits, IHUTs offer important benefits.

### **Better quality assessments of touchy-feely products**

It's always good to know what people think about a product they're looking at on a digital device. However, opinions about images can't compare to actually holding a product in your own hands and trying it out yourself. Paper packages feel different – paper can feel smooth, glossy, rough, or silky. Beauty and home care products have a variety of scents – vanilla, apple, musk. And of course, you can't taste sausages, beer, or ice cream over the internet. These sensory assessments simply can't be done digitally. But these products can be easily mailed to people's homes.

### **Improved external validity**

IHUTs offer people the opportunity to assess products at home in a natural environment. When it comes to food, there is no laboratory match to cooking in your own space-limited kitchen with your own stove's quirky temperature gauge and your own cooking utensils that never seem to be fit for the job at hand. Similarly, there is no match to assessing a new cleaning product on the spills left in the crevices of your toddler's rocking chair and the counter tops you got from a garage sale. Using people's natural environment means they get a genuine sense of whether they like or dislike a product based on how they would actually use it in real life. In addition, researchers can see exactly where products are used, how products are used 'improperly,' and what other products are used with them (perhaps there's a co-branding opportunity hiding in there!).

### **Improved access to wide geographical areas**

In most cases, central location testing means that opinions are only gathered from people who live in large urban areas. These people are able to use public or personal transportation to travel to a predetermined location. However, IHUTs can easily gather opinions from people who live in remote or low population areas. And this could be key for certain products geared to rural areas or low-income people who can't afford to take time to travel to a central location.

### **Improved access to hard-to-reach people**

Some people are simply unable to make their way to a central location no matter how convenient it is. Elderly people or care-givers may not be able to travel or take time away. People on a limited budget may have no travel options available to them. IHUTs make it really easy for everyone to share their opinions, and for you to gather more generalizable results based on all target groups, not just the convenient target groups.

### Improved access to the entire family

IHUTs allow researchers to understand the opinions of not only the participant but also their family and friends. Some products, such as home and personal care products are likely to be shared among family members whose viewpoints are just as important as, and sometimes even more important than, the individual selected to participate in the assessment. Other products, such as snacks and beverages, are likely to be shared with friends who might have completely different viewpoints about which snacks they want you to bring to the next game night. IHUTs are a great way to learn how household members and friends of different ages, genders, and backgrounds experience the product.



### Decreased external influencers

Unlike other in-person methodologies, in-home tests avoid the potential influences of outsiders. In group sessions, skilled researchers take great care to avoid group think which can inappropriately lead people to offer opinions they didn't originally have. Similarly, social desirability can cause people to avoid sharing their true opinions for fear of looking bad to other group members or to the researcher. The only people who can influence someone participating in an IHUT are the people who would typically influence that person's buying decisions – their family and friends.

## Disadvantages of IHUTs

As with any research methodology, IHUTs have disadvantages as well. Why might you choose a different methodology?

### Cost-prohibitive to test expensive products

Some products are simply too expensive to give away for free – or to reasonably expect people to return them after assessment. Expensive electronics or home appliances are simply not going to work with the IHUT methodology. In such cases, central location tests, where people join the researcher in a predetermined location, are the perfect solution to the problem. Bring the dishwasher, fridge, or television to a central location and people can test it there, either individually or in groups.

### Confidentially

Some products are highly confidential such that even presenting photos on the internet, where images can be screen-capped or photographed with a cell phone, is a problem. If the risk of losing proprietary information to competitors or the wider public is too great, central location tests are once again the perfect alternative to the IHUT.

### Precise experimental control

If you need to conduct research on a product that has a steep learning curve and very precise processes and methods for proper usage, an IHUT may not be the best option. Once again, central location tests are the perfect solution. In these cases, the researcher who has been carefully trained to use the product and demonstrate it without bias can guide participants through the assessment. Of course, if you want to know all the different ways that people misuse and abuse a product while they learn how to use it, an IHUT might just be the perfect solution after all!

## Products that work well for IHUTs

Your imagination is the limit! While IHUTs are not recommended for very expensive or confidential products, it is possible to offer nearly any consumer packaged good for in-home testing.

### Consumables

It doesn't matter if a product needs to stay frozen or if it's a liquid in a fragile, glass container. Frozen food can be shipped in packages that keep them frozen, and liquids such as alcohol and shampoo can be mailed in break-proof packages. Consumables such as cookies, candy, snacks, condiments, salad dressing, cereal, and baking supplies are always easy to mail to people's homes, even products that might expire quickly.

### Personal care

Personal care products such as shampoo, razors, wipes, foot care, eye care, feminine hygiene, and cosmetics products are easily packaged and mailed for IHUTs.

### Health care

Testing health care products can be somewhat riskier when you're uncertain if children will be in the home. However, securely packaged test kits will help ensure that only adults are able to access OTC trial offers, vitamins, supplements, sexual health, and other similar products.

### Home care

Home care products are perfect for IHUTs as they allow people to assess products in the environment they'll actually be used in. Laundry detergent, stain removers, fabric softeners, furniture polishers, garbage bags, and insect traps and more are perfect for IHUTs.



## Current trends in package tests

As consumer needs and desires evolve over time, so do their expectations of product packaging. Here are a few recent packaging trends we've seen.

### Transparency

When companies create packages that allow people to see the product before they buy it, without ripping it open, they are signaling to consumers that they are open and honest about what their products really are. Consumers don't have to purchase the product to find out if the depiction on the package is truthful of what's inside.

Similarly, transparent information on the package reflects a company mindset of being honest with consumers. Easy to read ingredient lists, and clear and focused mission statements on products, shows that companies are transparent about who they are and what they stand for.

### Digital integration

Many products now incorporate online components. From encouraging people to use brand specific hashtags, share photos of themselves with products, or obtain a discount by 'checking-in' on TripAdvisor or Facebook, many packages encourage consumers to share their personal experiences with their friends in the digital world.

### Responsible packaging

Sustainability is a huge and necessary trend. Many companies are now redesigning packages to respect the environment. That could mean creating rectangular beverage bottles to reduce shipping and shelving costs, using materials that are fully biodegradable, physically removing plastic from the packaging, and switching from polystyrene to cardboard.

### Changing the Concept of Packaging

Various companies are creating straws, food wrap, bags, and utensils out of edible materials. Consumers will need to confirm that these service items still function well, for instance, that straws still work with milkshakes and don't alter the taste.



## How to create the test product or package

Great packages are functional, accessible, attractive, and unique. Every aspect conveys the intended message, including the colours, shapes, designs, iconography, messaging, and more. And, sometimes the packaging must stand alone as the entire advertising and marketing plan for a product.

So how is that initial test package created?

### Step 1: Understand the product goals and its place in a competitive environment

*WHAT does the company want to express?* Start by understanding the goals of the packaging. Gather essential details from key stakeholders, including brand managers, marketing managers, and senior leadership. These details might relate to the company and product purpose, messaging, brand colours, imagery, materials, and more. The stakeholders must have a clear understanding of what they want the package to communicate to shoppers.

*HOW will a retailer display the package?* The package designer must understand how stores will display the package for customers. How will your package look sitting next to competitor packages? What competitive packaging features might be memorable and desirable enough to draw customers away from your package? Will customers want to pick up the various packages from the shelf to read the labels, or smell or touch the contents?

*WHO will use the package and how?* Once a product has been purchased, will consumers throw it in the cupboard or freezer never to look at it again until they need to use it, or will the package sit in a prominent place on the counter for weeks until it is used up? Will consumers want to see variety in the packaging? Will children, elderly people, or people with special needs use the product, requiring it to open either very easily or only with superior agility?

### Step 2: Choose finalists

With all of this product information on hand, a designer might produce twenty prototype ideas. With these prototype ideas, people can compare the potential new packaging with other existing packaging that you or your competitors have. Learn whether people prefer the old, the new, or the competitors' packaging. Find out whether people consider some of the packages to be more innovative, appealing, or easier to use.

Keep in mind two main barriers:

- Introducing an innovative design in a category where people expect the packaging to look, feel, or behave in a certain way could be problematic. Convincing people to choose a different package can be very difficult.
- No matter how incredible a design may be, people often prefer existing packages because they are familiar with them. In this regard, if a new package generates similar test scores as an existing package, this could be a huge win for the new package.

*Qualitative research:* At this stage, many types of research could be useful. Qualitative research is the perfect way to present physical prototypes to potential customers to look at and manipulate. Focus groups could incorporate competitive packaging into the assessment so people can compare a potential package with existing package. Laboratory shelf-tests could be conducted to understand how consumers would respond to the package if they were presented with it in store. Eye-tracking tools could be combined with laboratory shelf-tests to better understand how the potential package would compete on shelf in the category.

*Quantitative research:* Quantitative research would also be helpful at this stage. A quick concept test using a quantitative survey could help weed out designs that would likely be less impactful with consumers. Consider running a conjoint exercise with potential package designs to identify which sets of sizes, shapes, colours, icons, and fonts might be most successful. In addition, people could quantitatively rate the package according to various criteria such as appeal, uniqueness, or purchase intent.

### **Step 3: Tweak the winners**

Once the two or three winning designs have been identified and adjustments made as a result of the last phase of research, you can focus on testing the final candidates.

*Groups and IDs:* Qualitative research will help you improve and fine-tune the best designs. As part of focus groups or individual interviews, every detail of the final two or three winning design should be evaluated for potential improvements. This could be slight tweaks of the colour, moving or refining words or phrases, adjusting the contours of designs, or adjusting the package itself for functionality and accessibility.

*Quantitative survey:* A quantitative survey with a representative group of people in your target group will help you evaluate the packages in terms of key brand metrics like consumer attention, pricing expectations, brand likability, brand image, purchase intent, and purchase frequency. If one of the winning designs is clearly trailing, it should no longer be considered a viable option.

### **Step 4: Confirm the winner**

*IHUT:* As a final check, an in-home-usage test will help to identify potential issues with package functionality, viability, product safety, or product damage. These criteria can be examined among a broad range of potential customers and their friends and family using the package as they normally would in their own homes.



## How to launch IHUTS and product/package tests

IHUTS require an extensive amount of planning and organization. However, if you're working with an experienced provider, they will manage most of those details for you. Here are four key items to think about as you plan your IHUT.

### Overages

Remember to provide extra pieces of product. This is mainly because of completion rates. Since people have already completed a screening questionnaire, the completion rate for product tests is higher than that of one-off questionnaires. However, it still won't be 100%. Thus, 130 products might need to be sent out in order to generate 100 fully completed product assessments.

Additional product will also be necessary as a few products may have been damaged on route to the facility, or a few research participants might lose, break, or mis-use something and require a replacement in-hand quickly. Your IHUT partner will ensure the right amount of product is made available – not too much and not too little.

### Product codes

Products that are tested unbranded must be individually coded with letters and/or numbers so that every participant can provide feedback specific to the product they received. This is particularly important when research participants receive multiple products that look the same, or when there are multiple groups of people each receiving a different variant.

Both unbranded and branded products must be labeled with an individual reference code. This is how researchers ensure a participant has actually received the product. Your IHUT partner has techniques in place to accomplish this coding for you quickly and efficiently.

### Ingredients

Every product must have an ingredient list. Although the screener is intended to identify people with allergies and prevent them from participating in the study, an ingredient list provides a second level of safety for research participants who may have neglected to mention or recall a specific allergy. Further, they help people who have moral or ethical issues with using products made using animals or products that are harmful to the environment. The best ingredient lists also mention whether products are kosher, halal, or vegan.

For safety reasons, most research associations have an ingredient list requirement in their standards documentation.

### Shipping

An often-forgotten step in the IHUT process is that sufficient time must be allowed to ship the product from the factory to the research facility so it can be prepared, coded, and distributed to research participants. Products are rarely shipped overnight so a great partner will take care to build time into the plan to allow for slower than anticipated shipping.

## About Canadian Viewpoint

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