



Consumer Home Use Testing A Practical Guide

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Home Use Tests can be a very cost-effective means of reaching many consumers without the overhead costs of conducting a product test in a central location or lab. Home use testing also allows for a representative testing environment, where consumers evaluate products in the home as they normally would.

This document is intended to provide an overview of the process and considerations of consumer home use testing. As with any sensory and consumer test, care must be taken to ensure that the right questions are posed to produce an actionable result. Questionnaires should be kept as short and meaningful as possible, to ensure that panelists are engaged and thoughtful, providing useful results. Consideration should also be given to the product being assessed – too many high fatigue or “boring” products may generate noisy data. A balanced incomplete block (BIB) experimental design may be used to address such issues.

For more information on how Compusense Cloud can be used to run home use projects from start to finish, contact us at cloud@compusense.com.





Contents

1. Define Testing Objectives
2. Determine Products for Evaluation
3. Create your Questionnaire
4. Determine Testing Requirements
5. Recruit and Schedule
6. Product Distribution
7. Collect Data
8. Monitor Responses
9. Compensation
10. Review Results
11. Generate Report



1. Define Testing Objectives

The very first step in planning a consumer home use test is determining your test objectives.

What is the intended outcome?

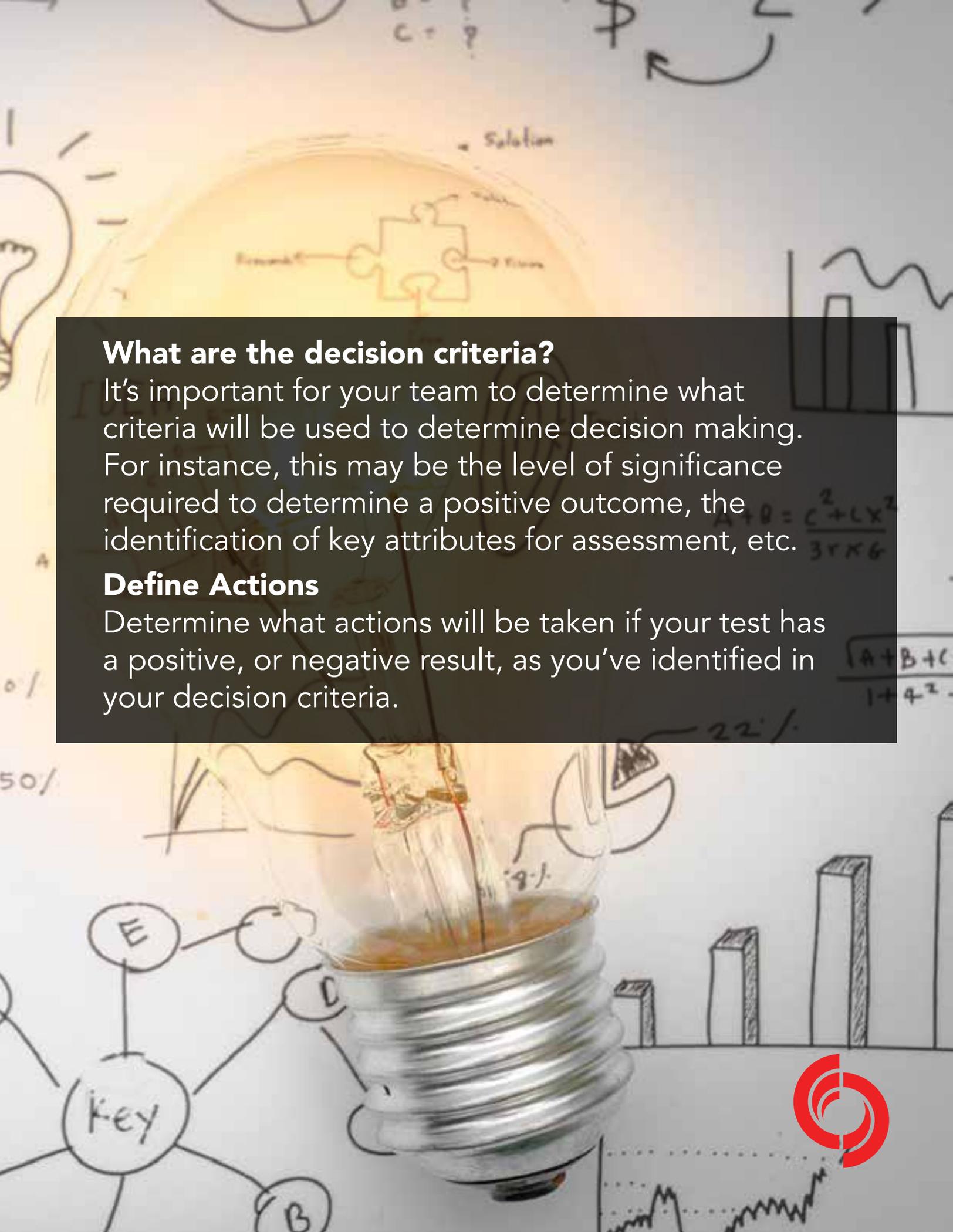
Do you want to show that your product is superior in overall liking compared to a competitor, or perhaps determine if consumers accept a new product formulation? Determining your intended outcome will directly affect the test ballot, the audience, and the design of the test, which is why this is a crucial first step.

Who are the target consumers?

You must determine the specific criterium for your target demographics. This may include a variety of variables, including age, gender, location, annual income, product purchasing history, etc.

What markets or locations will be targeted?

The geographical location(s) need to be determined. Do you only want to target consumers in a certain city, country, or maybe within a set radius from where the products will be picked up or shipped?



What are the decision criteria?

It's important for your team to determine what criteria will be used to determine decision making. For instance, this may be the level of significance required to determine a positive outcome, the identification of key attributes for assessment, etc.

Define Actions

Determine what actions will be taken if your test has a positive, or negative result, as you've identified in your decision criteria.



2. Determine Products for Evaluation

It's now time to determine what products will be used in the home evaluation.

Identify products

- Identify products (e.g. national brand, regional leaders).
- Consider sample variability.

Source required samples

- How will purchasing product be handled?
What costs are involved?
- Consider whether to use blind (unbranded) vs branded samples.
Are there costs involved with de-branding?
- What are possible shipping concerns with the product(s)? (e.g. special packaging required, size concerns, etc.)
- What are possible storage concerns with the product(s) and associated costs? (e.g. warehouse space, refrigeration, shelf-life implications, etc.)

3. Create your Questionnaire

- Determine key questions and question types (e.g. Liking, Just-About-Right, ranking).
- Determine action outcomes for each question.
- Consider including usage and attitude questions to help gain deeper panelist insights. This could include purchase Intent, category or product consumption, shopping role, etc.
- Create appropriate instructions for the product evaluation. This should include preparation instructions, how to evaluate the product, and how the consumer should dispose of the products.
- Review your ballot. This should include a practical review using the actual product(s).
- Revise your ballot as needed.
- If required, get feedback and a final sign-off from management and key stakeholders.
- If required, request a legal review of your questionnaire.
- Create a screener questionnaire for recruiting that will link to the product test. This will be used to screen and schedule appropriate panelists within your desired demographic(s).



4. Determine Testing Requirements

Now that you've defined your project objectives, you'll need to determine what will be required to complete testing.

- Determine the timeline for the project and create a detailed plan.
- Decide the minimum number of consumers required to make a decision.
- Determine whether you will be using an existing database, or recruiting brand-new consumers.

Recruiting new consumers

If you will be using new consumer panelists, you must consider the following and their associated costs:

- Will you purchase a panelist list from a supplier?
- Will you recruit with an online application form?
- Advertise for panelist recruitment (online, newspaper, community advertising, other)?
- Have you considered panelist terms and conditions? What are the privacy considerations for recruitment? Are there regional and local data privacy limitations?

Use existing database

If you are using an existing database, frequency of attendance and reliability of performance should be considered to eliminate “flat-liners” and “no-shows”.

Other considerations

- What is your over-recruit number? Product type, incentive, and panelist engagement should be considered.

Determine compensation for participation

- This may include monetary payment, product, company credit, etc.
 - What is the incentive?
 - How will the consumers receive compensation?

Determine data collection method

- What devices will be used? (Desktop computer, laptop, tablet, smartphone, etc.)
- Are there additional budget considerations?



5. Recruit & Schedule

Recruit Panelists

- Create a schedule for testing.
 - How long will panelists have to complete the evaluation after receiving the product(s)?
- Determine the quota criteria (e.g. gender, age ranges, household income, purchase history, etc).
- Consider any possible allergies.
- Deploy the screener questionnaire to select the appropriate panelists.
- Confirm the recruit and quota numbers. You can adjust the screener criteria if an insufficient number of panelists are recruited.
- Consider the staff time required for recruiting. What are the associated costs?
- Consider the type of recruit:
 - Automated recruit?
 - Telephone recruit?
 - Electronic recruit?
 - Intercept recruit? (e.g. shopping centre)
- Determine panelist contact method (email, telephone, mail).



6. Product Distribution

It's now time to distribute the test product(s) to the accepted home-use panelists. If your distribution facility is in close proximity to your test area, another option is to have panelists come and pick up the product, which can also help to reduce costs.

Shipping your product(s)

- Label products with appropriate blinding codes and instructions.
- Determine if products need to be de-branded. What are the associated costs?
- Determine product shipping protocols (packing, refrigeration), or pickup requirements (pickup locations, retailers?).
- Package, label and ship products.
- Determine whether you will ship all products at once, or stagger distribution and ship one product at a time?
- Prepare for issues around incorrect delivery or storage problems (refrigeration, spoilage, breaking).



7. Collect Data

- Deploy the product test to panelists. Essentially there are two options:
 - Provide paper ballots
 - Distribute the ballot electronically
- Ensure there is sufficient and engaging communication with panelists, often through email.

8. Monitor Responses

As test results are being collected, monitor the incoming responses to:

- Verify the data is being collected as expected (time, number of responses, sample order).
- Prompt panelists to complete the test if they are not responding.



9. Compensation

Provide the incentive to panelists.

- After panelists have successfully completed the in-home evaluation, prompt reimbursement is important.



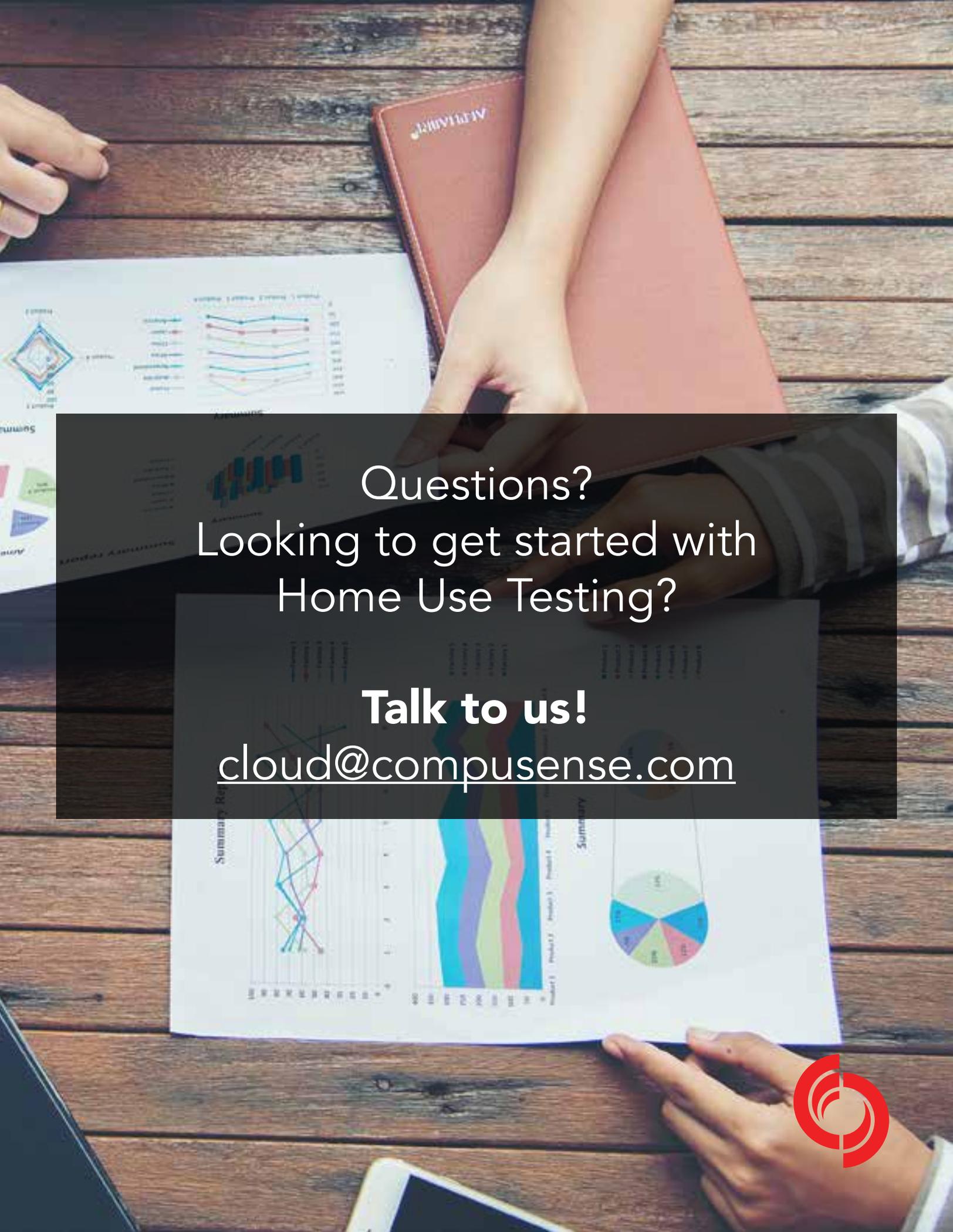
10. Review Results

After all data is collected, you can now begin to review your test results.

- Review the raw data.
- Review the summary and standard reports.
- Review the appropriate analyses.
- Assess the need for additional data.
- Explore segmentation for possible insights (e.g. males / females, age segments, cultural differences).

11. Generate Report

- Produce a report based on the results that can be shared with your team.
- Include data visualizations to support recommendations.
- Get management and stakeholder approval for the report, if necessary.
- Submit your findings and report to decision-makers in your organization (upper management, internal or external client, etc.).

A top-down view of a wooden table with several documents and a laptop. A person's hand is pointing at a document that features a line chart and a pie chart. The text is overlaid on a dark grey semi-transparent rectangle.

Questions?
Looking to get started with
Home Use Testing?

Talk to us!
cloud@compusense.com

