**In-Home Package Test**

**Recommended Study Name:** In-Home Package Test

**Objectives:** To evaluate and improve packaging by determining appeal, communication of benefits, package functionality and the effect on purchase intent.

**PRO-TIP: An In-Home Package Test study is more complex than a regular activity. In this template, we have pulled from our experience to provide you with a simple yet detailed guide for you to launch your own study.**

**Here is an overview of the activities for an in-home package test. Talk to your CSM if you need support designing or managing your activity.**

|  |  |  |
| --- | --- | --- |
| **Stage** | **Description** | **Resources & Templates** |
| **1** | **Identify members among your community to participate in the in-home test** | **Study Part 1 - Sample Invitation**  **Study Part 1 - Activity Template** |
| **2** | **Send package to participants** | **Study Part 2 - Package Insert: Instructions to Participants** |
| **3** | **Online survey activity** | **Study Part 3 - Sample Invitation**  **Study Part 3 - Activity Template** |
| **4** | **Online discussion activity *(optional)*** | **Study Part 4 – Discussion Forum Moderator Guide** |
| **5** | **Shareback with the community – follow-up & thank you** |  |

**PRO-TIP: Consider sending out a product package that is currently on the market to use as a benchmark.**

**Stage 1: Identify Participants**

**Email Invite**

**Subject:** In-Home Package Test

Hi **[%Name%]**,

We would like to invite you to take part in a special project. We have an exclusive opportunity for **[INSERT COMMUNITY NAME]** to evaluate the new package for **[PRODUCT]**. There are a few questions for you to answer, and then we will send you a sample to look at.

**ALTERNATIVE INVITATION TEXT:** This is your opportunity to tell us what you think about the packaging for **[BRAND + PRODUCT]**. This project has a limited number of spaces, so only those who qualify and are available will be invited. If you qualify, then we will send you a sample to look at and experience.

After that, we will ask you to share your thoughts in a quick online activity.

**Click here** to get started. Or, copy and paste this link into your browser: **[%Link%]**

**[CONSIDER INSERTING TAKE-AWAYS FROM A PREVIOUS ACTIVITY TO FEED BACK TO MEMBERS AND DRIVE ENGAGEMENT]**

Enjoy!

**[COMMUNITY NAME]**

**Questionnaire**

**[Q1] Intro**

**Question Type:** Instructional Text

Who sees this question? All respondents

Welcome! As mentioned in our email invitation, we are extending a special invitation to a select group of **[IC NAME]** members who we think will be interested in participating. This is a brief activity to find out a bit more about you and your interest in participating.

**[Q2] Screener**

**Question Type:** Multi Choice

Who sees this question? All respondents

Which of the following products do you purchase on a regular basis?

**[QUESTION THAT WILL HELP YOU IDENTIFY THE TYPE OF PARTICIPANT YOU WANT TO INCLUDE]**

**[Q3] Screener**

**Question Type:** Multi Choice

Who sees this question? All respondents

Which of these brands have you purchased in the past 6 months?

**[QUESTION THAT WILL HELP YOU IDENTIFY THE TYPE OF PARTICIPANT YOU WANT TO INCLUDE]**

**[Q4] Agreement**

**Question Type:** Single Choice

Who sees this question? All respondents

We are looking for people to take part in this package test. If you agree, we will send you a **[ITEM]** and ask you to

* **[INSERT TEST EXPECTATIONS]**
* **The package will need to be returned at completion of the study:**  At the completion of this trial, you will need to send the **[ITEM]** to us in the original box by affixing the pre-paid UPS shipping label. All you have to do is call a UPS toll-free number to schedule the pick-up. You will not have to pay for it. The product must be returned by **[DATES]**.
* **Liability:** Please note that in order to participate you will be required to electronically sign a liability release waiver.

Do you agree to comply with the above in order to be considered to participate in this study?

I agree

I disagree **[TERMINATE]**

***Optional***

**[Q5] Photo Sharing**

**Question Type:** Single Choice

Who sees this question? All respondents who agree

You will be asked to upload pictures using your camera or phone to share more about how you opened the package and used the product. The photos will not be circulated outside of this activity.

Are you comfortable with what we are asking you to do?

Yes

No **[TERMINATE]**

**[Q6] Timing**

**Question Type:** Single Choice

Who sees this question? All respondents who agree

The in-home package test are scheduled for **[DATES].** During the trial when you are using **[ITEM]** you will be asked to complete an online activity about your experience and participate in a discussion board.

Would you like to participate in our in-home package test?

Yes

No **[TERMINATE]**

***Optional***

**[Q7] Address Type**

**Question Type:** Single Choice

Who sees this question? All respondents who agree

If you are selected to participate, we’ll be shipping you a **[ITEM]**. We may need someone present to sign for the product. Will we be shipping to…?

A home address

A business address

A PO Box **[TERMINATE]**

**[Q8] Contact**

**Question Type:** Open End

Who sees this question? All respondents who agree

In order to send you the package, we need to collect your contact details and shipping address.

Phone Number

Email Address

Street Address

City

State

Zip Code

**Survey Complete**

**Question Type:** End Survey

Who sees this question? All respondents who agree

That’s everything for today! Be sure to watch for the **[PACKAGE]** to arrive at your door the week of **[WEEK]**.

We really appreciate the feedback and look forward to hearing from you again soon.

Thanks again!

**[COMMUNITY NAME]**

**DQ**

**Question Type:** Instructional Text

Who sees this question? All respondents who do not qualify

**[DQ TEXT FOR PARTICIPANTS TO BE REUSED AT ALL DQ POINTS]**

Thank you for your interest in this activity for **[BRAND OR INSIGHT COMMUNITY]**. Unfortunately we already have enough participants.

We really appreciate the feedback and look forward to hearing from you again soon.

Thanks again!

**[COMMUNITY NAME]**

**Stage 2: Instructions To Participants**

**[PRODUCT] Test – Instructions & Information**

Thank you for participating in our in-home package test! We really appreciate that members like you are willing and eager to help us learn and improve our products. We know that life is busy, but we hope you’ll be able to complete all of the activities – open the package, complete the activity and participate in our online discussion.

Before you open the package, please read the description and instructions below.

**[PROVIDE BRIEF DESCRIPTION OF THE PRODUCT AND THE PURPOSE OF THE PACKAGE TEST]**

Please keep this description in mind when evaluating the product packaging.

**Product:**

**[PROVIDE A SUMMARY OF THE PRODUCT AND USES]**

**Safety Warnings!**

**[PROVIDE ANY NECESSARY SAFETY WARNINGS (E.G. ALLERGY ALERTS, WHEN TO STOP USE, FLAMMABLE ETC]**

If you experience any adverse reaction while using the product, discontinue use immediately and seek medical attention if necessary.

**Packaging Directions:**

**[PROVIDE ANY INSTRUCTIONS FOR THE OPENING OF THE PACKAGE OR USE THE SAMPLE INSTRUCTION BELOW]**

We want to capture your initial reactions and early ideas on how you would improve this **[PACKAGE]**.

We provided you with **[COUNT] [PRODUCT]**, please …

* Open the package by following the instructions
* Then follow the preparation instructions on the product
* Save the original product packaging because you may be asked to refer to it during the online activity
* Complete the online activity after you have used the product

You can find the link in your email invitation or available on **[INSERT COMMUNITY NAME & LINK TO HUB]**. Feel free to gather reactions from friends or family - there will be a place to share their opinions too.

Please try the product and complete the online activity by no later than **[INSERT DATE]**

**Support:**

If you have any questions during this study, please email us at **[INSERT EMAIL]**

**PRO-TIP: Additional tips for shipping instructions:**

* **Export a file with the name, address and product to be shipped to each respondent that has agreed to participate.**
* **If there are different types of packages being evaluated, we recommend attaching a product code sticker to ensure that each participant is commenting on the correct package.**
* **If you want the participants to return the package after the activity, then include a return shipping label and package with clear instructions. Remember to ask them to save the enclosed return shipping label and put it somewhere safe until the end of the project.**

**Stage 3: Online Package Test Activity**

**Email Invite**

**Subject:** Share Your Opinion on **[NAME OF PROMOTION]**

Hi **[%Name%]**,

Today we would like to find out what you thought about the **[BRAND + PRODUCT]** that we sent you.

Please wait to complete this activity until you’ve had an opportunity to try the product. If you haven’t received the package in the mail by **[DATES]**, then please contact **[NAME & CONTACT METHOD]**.

**Click here** to get started. Or, copy and paste this link into your browser: **[%Link%]**

We’re looking forward to hearing what you have to say!

**[COMMUNITY NAME]**

**Questionnaire**

**[Q1] Usage**

**Question Type:** Single Choice

Who sees this question? All respondents

Thank you for taking part in this activity!

Have you had a chance to open the package and try the **[BRAND + PRODUCT]**?

Yes

No

**[Q2] Incomplete**

**Question Type:** Instructions

Who sees this question? All respondents who have not opened the package

Once you’ve had an opportunity, please come back and complete this activity. You can either click on the activity invitation or login to the Insight Community Member Hub.

We’re looking forward to hearing from you!

**[Q3] Like**

**Question Type:** Single Choice

Who sees this question? All respondents who have opened the package

How much did you like or dislike the packaging for **[BRAND + PRODUCT]**?

Like extremely

Like very well

Like quite well

Like somewhat

Like slightly

Not like at all

**PRO-TIP: Use likeability and purchase intent to understand the performance of each package option. Talk to your CSM if you’re interested in identifying which package attributes are influencing performance.**

**[Q4] Purchase Influence**

**Question Type:** Single Choice

Who sees this question? All respondents who have opened the package

If this packaging was available in the store, what impact would it have on your decision to purchase **[BRAND + PRODUCT]**?

More likely to buy

Would not change my behavior

Less likely to buy

**[Q5] Expectations**

**Question Type:** Single Choice

Who sees this question? All respondents who have opened the package

How does this packaging compare to other similar products?

Better than others

The same as others

Worse than others

**PRO-TIP: This question can be changed to explore packaging expectations relative to a product category or a specific brand.**

**PRO-TIP: Use this question as a possible shareback to the community.**

**[Q6] Dislike**

**Question Type:** Open End

Who sees this question? All respondents who have opened the package

Is there anything you disliked about the packaging for **[BRAND + PRODUCT]**? What would you do to improve it?

**[Q7] Like**

**Question Type:** Open End

Who sees this question? All respondents who have opened the package

Is there anything you liked about the packaging for **[BRAND + PRODUCT]**? What would you do to improve it?

**[Q8] Package Characteristics**

**Question Type:** Single Choice Grid

Who sees this question? All respondents who have opened the package

What is your opinion of each of these aspects of the packaging of **[BRAND + PRODUCT]**?

Excellent

Very Good

Fair

Poor

**[SELECT A MAXIMUM OF 10 PACKAGE CHARACTERISTICS. CREATE YOUR OWN OR USE THE SAMPLE LIST BELOW]**

Overall appearance

Package shape

Package size

Color scheme

Ease of opening

Ease of closing

Easy to dispense product

Dispensed the correct amount

Does not leak or spill

Sustainable

Recyclable

Ease of storage

Fits easily in my refrigerator

Distinctive/ unique design

**PRO-TIP: Exploring the relationship of these attributes to purchase influence will help you understand if you have a successful package and what areas may need improvement.**

**[Q9] Package Communication**

**Question Type:** Single Choice Grid

Who sees this question? All respondents who have opened the package

What is your opinion of each of these aspects of the communication on the packaging of **[BRAND + PRODUCT]**?

Excellent

Very Good

Fair

Poor

**[SELECT A MAXIMUM OF 10 COMMUNICATION CHARACTERISTICS. CREATE YOUR OWN OR USE THE SAMPLE LIST BELOW]**

Ingredient information are clear and easy to read

Nutritional information are clear and easy to read

Expiration date are easy to find and read

Preparation instructions are correct

Preparation instructions are easy to follow

There is contact information

The picture of the product on the package matches how the product looks

The benefits are clearly communicated

Everything is written in plain language

It clearly expresses the benefits of the product

**[Q10] Product Benefits**

**Question Type:** Multi Choice

Who sees this question? All respondents who have opened the package

Which of these benefits of **[BRAND + PRODUCT]** do you see communicated through the packaging?

**[SELECT A MAXIMUM OF 10 STATED OR ASSUMED PRODUCT BENEFITS. THE SAMPLE LIST BELOW IS AN EXAMPLE FROM THE BEVERAGE INDUSTRY]**

Good to enjoy with friends

Genuine

It energizes me

It satisfies my thirst

It is natural

**PRO-TIP: This question can help you identify what product benefits your packaging is communicating to your customers.**

**[Q11] Share**

**Question Type:** Open End

Who sees this question? All respondents who have opened the package

Is there anything else you would like to share with us about how we can improve the packaging of this product?

**Survey Complete**

**Question Type:** End Survey

Who sees this question? All members

That’s it! Thanks so much for your time to let us know your thoughts about **[BRAND + PRODUCT]**.

We really appreciate the feedback and look forward to hearing from you again soon.

Thanks again!

**[COMMUNITY NAME]**

**Stage 4: Discussion Guide**

**[OPTIONAL PACKAGING DISCUSSION FORUM – Redirect members to a discussion forum]**

**[D1] Impressions**

**What were you first impressions when you received [BRAND + PRODUCT]?**

MODERATOR PROBES:

Is there anything that you were surprised about? What and why?

Did you like the packaging? What did the packaging make you think it would taste like?

What do you like/ dislike about it?

How did it make you feel about [BRAND]?

Where you disappointed with anything?

Lastly… do you have any feedback for us on in home package testing? If we were to do it again, what should we keep in mind? How could we do it better?

**[D2] Share**

**Did you share or show [BRAND + PRODUCT] to any friends or family?**

MODERATOR PROBES:

What did they think about it?

Did you expect that reaction from your friends or family?

Is there anything they strongly liked or disliked?

Do you think they would consume it in the same way that you did? How would it be different or the same?

What would you change if you were going to give this to friends or family?

**[D3] Influence**

**What influence does packaging have on your decision to purchase a specific product?**

MODERATOR PROBES:

Have you always felt this way about packaging?

What part of the package are most important to you?

What changes do you think we should make?

What types of improvements to packaging would you like to see in the future?

**Color Coding**

**Pro-tips**

**Input needed from you [customer]**

**Sparq pipe**

**Sparq settings**

**Sparq logic**