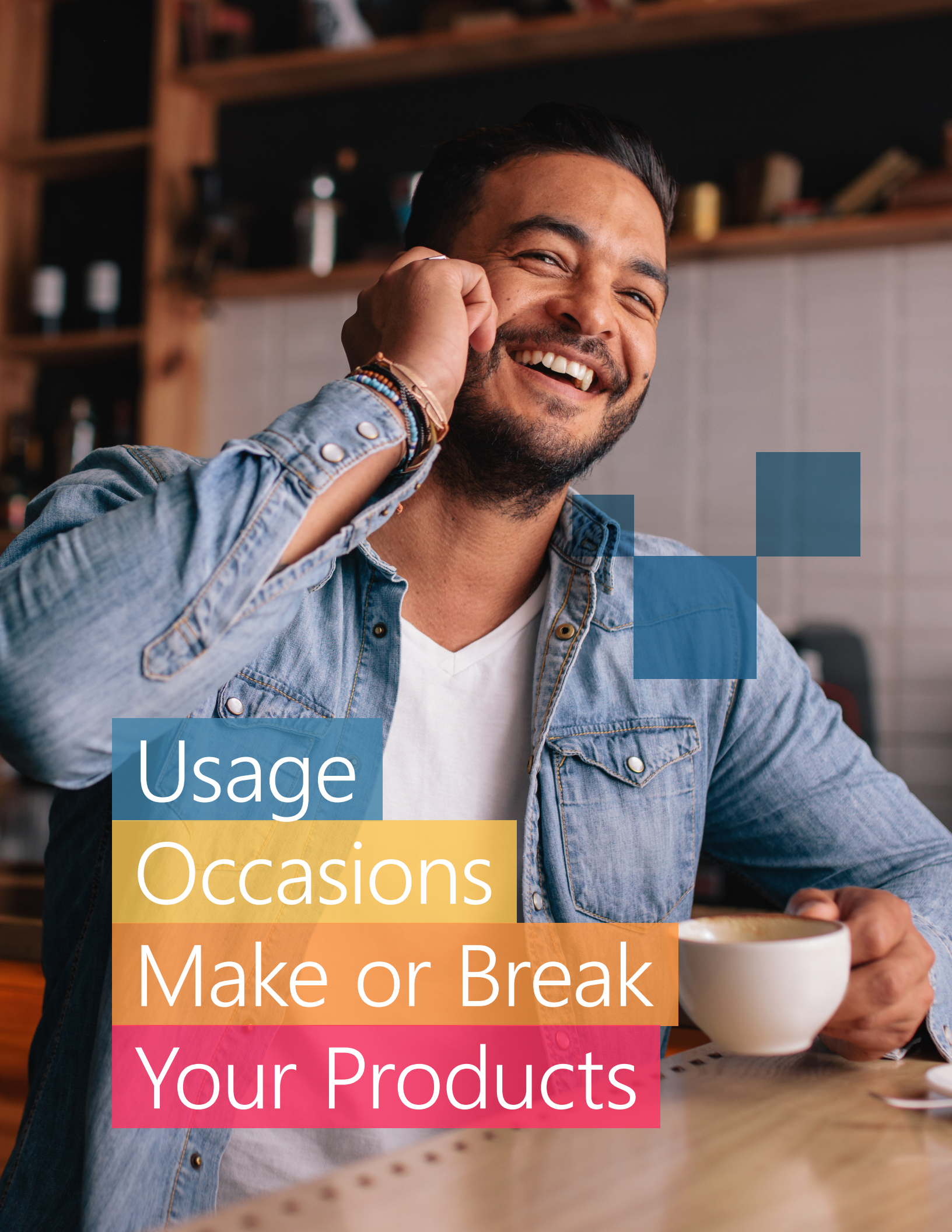
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Consumer Insights. Delivered.



Usage Occasions

How Well Your Product Performs Its Tasks


Usage
Occasions
Make or Break
Your Products

ABSTRACT

Products are not used in a vacuum, but rather at a specific place and time to fulfill an express purpose. The usage occasion ties together how and why a product is used with the consumer's expectations and their requirements for satisfaction. This is important for brands, as not understanding consumers' requirements of the product in the context in which it is used can lead to failure. A juicy burger can be a hit when served in a restaurant, but the identical burger may fail as part of a take-out meal or lunch on the go in the car. When brands do not fully consider the usage occasion when developing a product, it diminishes the product's potential for success.

Therefore, it's important to test the product in the context in which it will be used. Evaluating a sports drink in an exercise setting, candy packaging in a candy aisle, or baking paper in the kitchen environment, will lead to an understanding of how well the product delivers when being used in the real world for its intended purpose. Outside these contexts, consumers may have different views of the product, leading to different outcomes.

Understanding the usage occasion is vital both for successful product trial and repeat purchase. Getting consumers to buy the product is the first step for a successful launch. That's where promotion, claims, packaging and branding come into play- they establish a promise of what the product will deliver. This is what gets the consumer to purchase the product initially, convinced that it will meet their needs for the occasion. The second step is creating a product that will deliver on these promises. Repeat sales depend on delivering on the promise set up by the products' promotion and packaging.

INTRODUCTION

Creating a product that is well liked, differentiated from competitors' products, and has staying power starts with understanding consumers' needs, preferences, and frustrations. Anticipating these better and finding a better solution than the competition will keep consumers coming back repeatedly. Effective brands know that research focused on understanding their consumers is a vital precursor to introducing a product, whether it be a completely new innovation, or an improvement to an existing product.

One key factor often not considered in product development is the context or occasion in which a product is used. Products are not used in a vacuum; they are used at a specific place and occasion in a to fulfill a particular purpose. A cup of coffee can be used as a pick-me-up at work, a shared indulgence with a friend or as part of the morning ritual. The usage occasion ties together the context in which the consumer uses a product, the time of day, their motivations and requirements for satisfaction.



Incorporating this understanding can help brands develop superior products that are aligned with their consumers' most demanding requirements for satisfaction. But the implications go beyond just the product. Understanding the occasion enables more effective communications and allows claims to be customized to consumers' most important needs. It also enables packaging to be better designed to reinforce how a product is being used. With improved insights into how to integrate the usage occasion into product development and testing, brands can increase their products' success.

USAGE OCCASION'S REAL-LIFE IMPACT

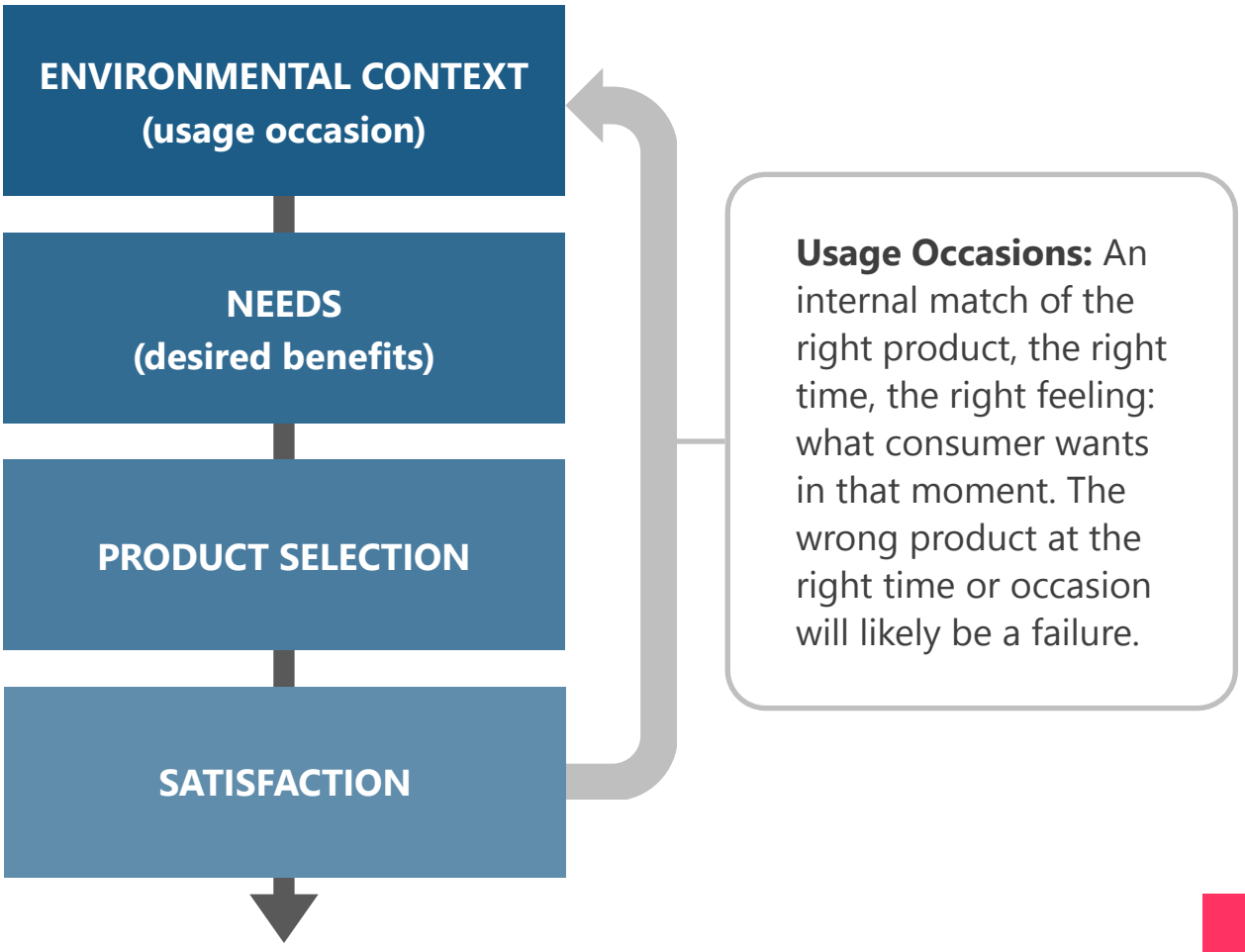
We've all seen new products that missed the mark by failing to understand consumers' needs, and how they would be using the product. Google Glass (tech empowered glasses) came out to much hype in 2013, relying on its high tech, cutting edge, image for sales. However, the makers failed to understand the usage occasion, the problem that it was trying to solve for consumers. Rather than cutting edge it was often perceived as creepy, as the hidden camera was pointed at your conversation partner, and with only 2-3 hours battery life and an inferior camera and processor, it missed the mark with its core high tech consumer (Yoon, 2018).

In contrast, in the 80s Kodak's consumer research predicted the advent of digital cameras, even developing their own camera. However, due to the size of their investment in film and associated products, they ignored the trend. They failed to understand that consumers were willing to trade off quality for cost and convenience – and digital technology disrupted the industry. By the time Kodak came out with a digital camera they were too late to market (Traqline, 2022).

Other products succeed precisely because they understand the consumer need and the usage occasion. In developing the Swiffer, through human centered, ethnographic, research, Proctor and Gambleobserved that when cleaning floors users wanted not only to minimize work, but to avoid being disgusted by touching wet, dirty, mop heads. They didn't just want a better detergent. And

thus, the disposable Swiffer mop using touch free electrostatic technology was born, disrupting a core industry (Keyles, 2023).

When brands do not fully consider the usage occasion, the context in which the product is used or consumed, when developing a product, it diminishes the product's potential for success. That's because it may not meet the consumer's needs or provide the benefits the consumer wants.



Usage Occasions: An internal match of the right product, the right time, the right feeling: what consumer wants in that moment. The wrong product at the right time or occasion will likely be a failure.





Different Context, Occasions & Needs

Consumers needs change based on the usage occasion; they may look for different benefits from the same product depending on the occasion. Coffee is just coffee—until it's not. Some people drink their coffee in the morning at home, completing the crossword puzzle before the household wakes up. The external environment is the home, and the internal environment is the feeling of peace—alone time and the ritual of getting ready for the day. The coffee may be consumed with breakfast or as a stand-alone item. But it is savored.

Another person might want a cup of coffee between meetings. The external environment for this coffee is work, and the cue is a certain time of day or activity. Internally, the person craves a reset, a reward for finishing a task. They are taking a conscious break or seeking an energy boost. Yet a third person may want a hazelnut latte, ordered at the café while meeting up with a friend for social time. Externally, it is a bustling, vibrant and public environment. Internally, the person wants a trendy and fun drink, an indulgence to make them feel special as they enjoy time outside their daily responsibilities.

All three use cases include coffee as the foundation, but their external and internal environments differ. They may not all be satisfied by the same coffee product, because they have different needs and expectations. Give the person at the café a black drip coffee, and they may feel unfulfilled, as it did not hit the spot. Offer the office worker a sugary and milky foamed coffee in between meetings, and it may feel like something is off. While there may be some overlap in coffee drinking occasions, the same coffee will not always meet the same expectations and needs.

That's why it's important to understand the different usage occasions and consumers' desired benefits to develop the right product and packaging. It is also vital to effectively communicate the product's attributes and benefits, to target the right consumers for the right usage occasions.



Enviromental Context

HOW UNDERSTANDING THE OCCASION HELPED MCDONALD'S CREATE A SUPERIOR MILKSHAKE



Facing a stagnating market, McDonald's worked hard with consumers to understand and optimize the important sensory attributes, sweetness, texture, flavor etc., of their milkshakes- but with little impact. They contacted Clayton Christensen's team at Harvard because they needed better ideas for how to improve milkshake sales. Christensen's research team went in a different direction, with a Jobs to be Done (JTBD) approach. After store observations and customer interviews, they learned that 40% of McDonald's milkshakes were purchased before 8:30 a.m., mostly from commuters enroute to work.

These shakes, while not traditional breakfast foods, were "hired" to do the job of being an easy to consume, mess-free one-handed breakfast. The milkshakes filled up the consumers until lunch, while helping to get through a long boring commute. They found that the frozen drinks did not compete against other milkshakes, but against other meal options that were harder to eat or less filling, like bananas or bagels.

But just as people drink coffee at different times and for different reasons, not everyone consumes milkshakes for the same reasons. While almost half the milkshakes were ordered by commuters, that leaves the other half. Parents "hired" some of those milkshakes to entertain their kids. They placated the little ones with milkshakes, boosting their status as loving parents while entertaining the kids for a limited time.

These milkshakes did different jobs, so they needed different formulations. While commuters reacted well to a longer-lasting thick shake, kids needed a shake that could be easily be consumed in less time. Parents didn't want to wait too long before getting back in the car—and they didn't want their kids holding a frozen drink in the backseat.

The usage occasions were different for each consumer group, so a one-size-fits-all approach would fail. McDonald's adopted the JTBD approach with different shake formulations, offering a thicker more filling morning shake and thinner one for the kids later in the day. It improved sales tremendously. They also changed the packaging to include a domed lid to minimize spills. As a result, McDonald's milkshake business boomed, reportedly increasing by up to 700%!

Observational research and asking the right questions are keys to understanding the usage occasion and developing the right product. It's all about getting a deep understanding of consumer motivations in specific settings.





Needs (Desired Benefits)

A PRODUCT MUST DELIVER ON CONSUMERS EXXPECTATIONS TO BE SUCCESSFUL

So, people buy products because are looking for a solution to their needs in a particular usage occasion. They may choose to purchase a thick milkshake for a commute, or they may choose a milkshake because it is thin flavorful and can be consumed quickly. However, understanding the usage occasion isn't only important for developing the product, it is also important for successful marketing. Getting consumers to buy the product is the first step for brands. The consumer will need to take it off the shelf, convinced that it will meet their needs, and pay for it at the checkout counter. That's where promotion, claims, packaging and branding come into play- they establish a promise of what the product will deliver. They must communicate the product benefits based on the usage occasion.

The second step is getting repeat sales. To accomplish this the product needs to meet the promise and deliver expectations, established in step 1. After all, this is why they bought it. If it does, next time they are in the same situation (e.g., facing a long commute or time to fill in with the kids) and have the same needs they will reach for the same product solution. If it fails to meet their expectations, however, next time they will look for a different solution. Repeat sales depend on delivering on the promise set up by the products' promotion and packaging.

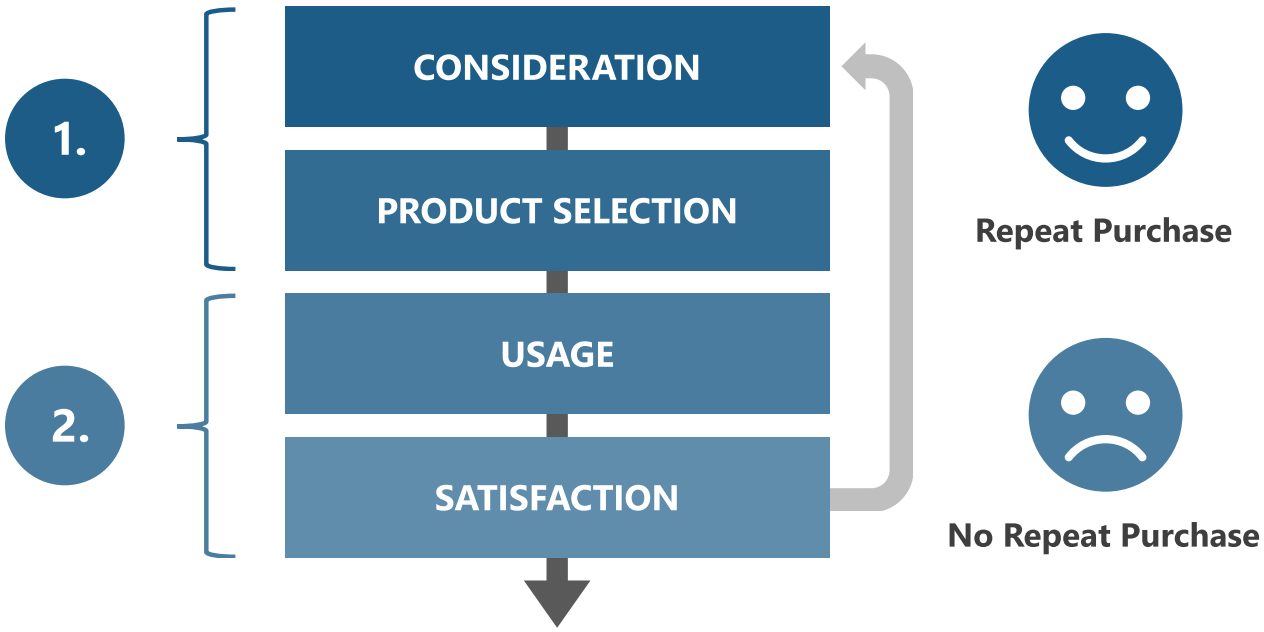
THE 2 STAGES OF PRODUCT ENGAGEMENT

Stage 1. **Initial Purchase:** Creating The Promise of Satisfaction

- **Standing Out** attracting consumers' attention
- **Packaging & Placement**
- **Promotion & Product Claims**

Stage 2. **Repeat Purchase:** Delivering On The Promise

- **Meeting or Exceeding Consumer Expectations**
- **The Product** delivers on the promise

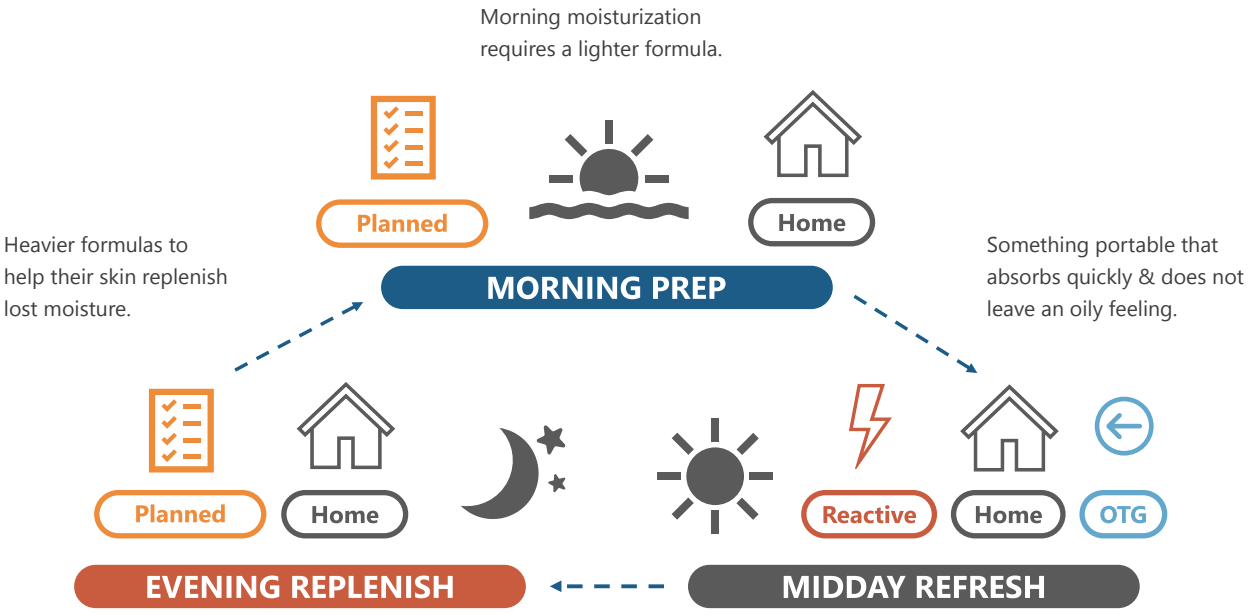






MOISTURIZER USAGE BASED ON TIME

Let's look at this idea through the lens of moisturizers. Our research shows that depending on the time of day and the climate, people will have different needs. In the morning, they are in a hurry and are looking for a daily moisturizer that is thin, absorbs quickly, smells nice, is easy to spread and may be used under makeup. In the evening they have more time, and their skin is depleted from the day. They are looking for a moisturizer that is thicker and more nourishing to help to replace lost moisture. A nighttime product that is positioned as thin and spreadable, or a daytime product that is thick, nourishing and leaves a protective layer, will likely lead to disappointment and a different choice next time. A holistic approach where companies understand their products usage occasions and the needs in those occasions, and market towards these will have a better chance of success – as long as the product delivers on the promise.



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Product Selection

THE IMPORTANCE OF CONTEXT

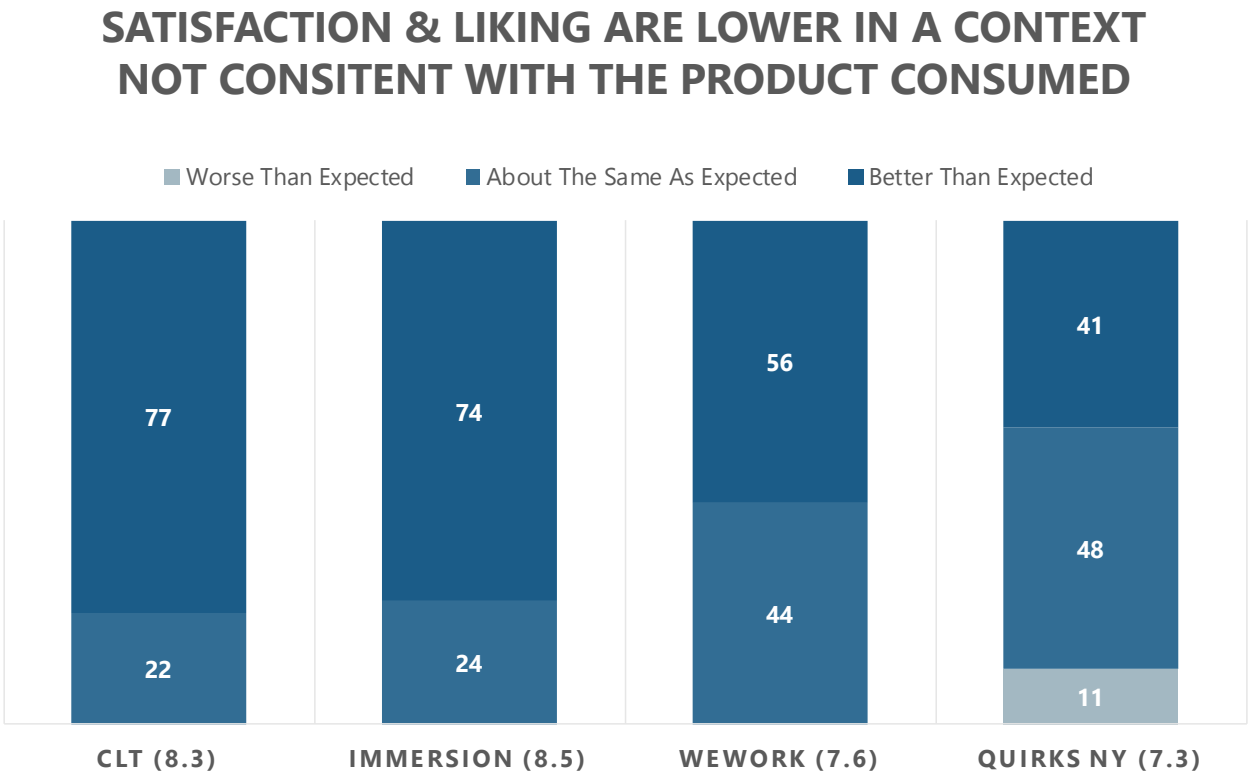
Research has convincingly shown that environmental elements (internal and external) present when we experience an event are 'encoded' and stored along with other information related to that event. When we are later in the same environment, those elements can act as cues or triggers, to enhance that memory retrieval. This holds for products as well. A particular environment will trigger related memories along with the emotions, motivations, cravings and needs linked to it. Thus, a product that we previously found satisfying and enjoyable is likely to be recalled, desired and consumed when we are back in the same context.

Consider peanuts sold at baseball games. People don't usually think to buy them roasted and in the shells to snack on outside that context. Yet when going to a baseball game, some consumers start looking for the peanut vendor as soon as they get to their seats. The association and location are paired. Someone wanting to serve peanuts as a cocktail party snack or take them on a hiking trip won't buy a bag of peanuts in the shell. They want a different experience in eating the peanuts, choosing a jar or can instead. The usage occasion makes a big difference even though the peanuts inside those shells are the same.

Testing the usage occasion's impact

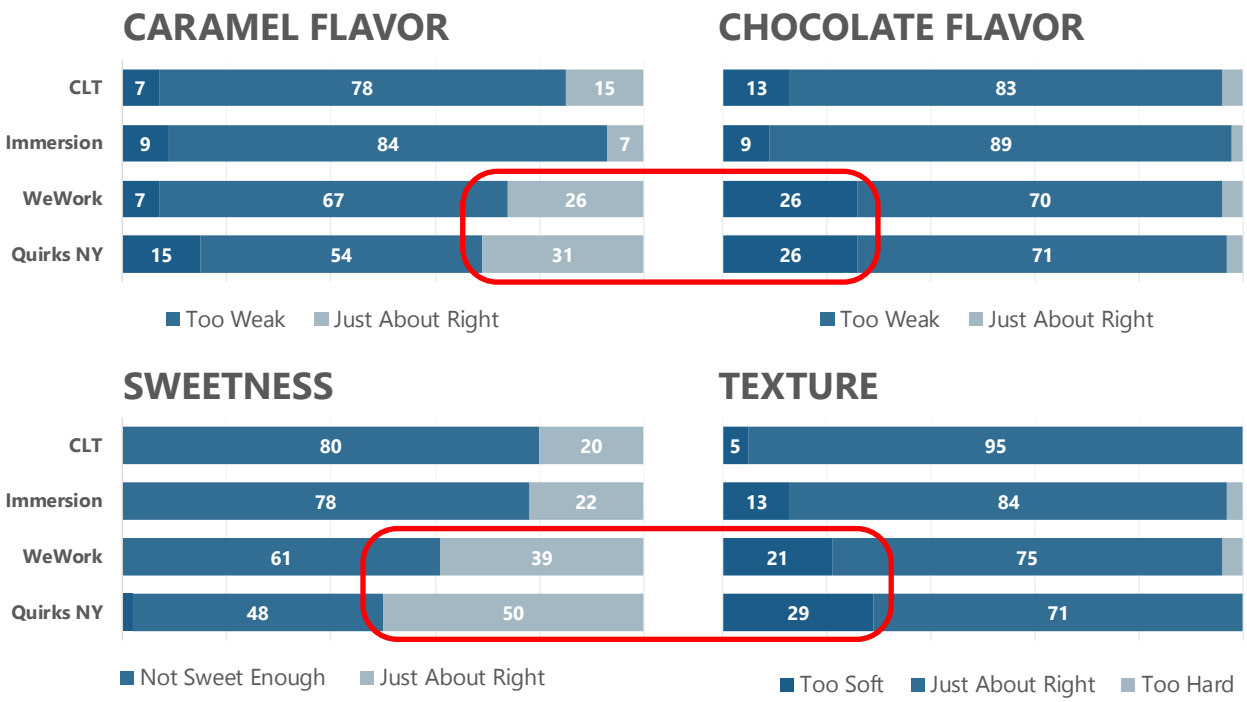
To more fully understand the impact of the usage occasion on product perception, we conducted a series of experiments. The findings (below) indicated that the context in which a product is used can affect our emotional and motivational states, product choices, expectations, consumption and satisfaction. We found that the same chocolate is perceived and appreciated differently based on the usage occasion.

We tested chocolates in four environments: a research laboratory (a CLT or Central Location Test), an immersive space created for the product (simulated chocolate shop), an in-office experience (WeWork) and at conference. Consumers were most satisfied with the chocolate in the chocolate shop or in the CLT setting, with a neutral context. In both places the chocolate was seen as appropriate. In the CLT, participants knew they were there to test a product. In the immersive environment, quality chocolate was expected.



In contrast, in the work environment and conference settings, chocolate was less appropriate and liking significantly decreased. Why? Chocolate felt too indulgent in these settings. Consumers felt guilty eating chocolate rather than healthy snacks in a work environment. We found that consumers' chocolate enjoyment and satisfaction were higher when the context matched (i.e., was congruent with) the product. The CLT and immersive experiences represented the environments compatible with consuming a treat, while the work environments were not.

Context also impacted people's sensory perceptions. People in the conference and WeWork environments rated the chocolate flavor too low and caramel too high—it was perceived as too sweet and too soft. In contrast, in the CLT and chocolate shop environments the flavor and texture profiles were perceived as 'just about right.'



We repeated the experiment with a nutrition bar in the CLT and work environments. The energy bar received higher liking ratings in the work setting, compared to the CLT. From this, we confirmed the effect of context on acceptance and showed that people do not just rate liking lower in a work environment—it depends on how well the product fits the environment.





Usage Ocassion Impact

HOW TO TEST THE IMPACT OF CONTEXT OR THE USAGE OCCASION

Context, whether external or internal, is important, so it's vital to test products in context during the development process. There are a number of ways to complete testing, depending on the products, the users and the situation. Here are five ways to approach it.

#1 Ethnographic Testing

Ethnographic research involves observing consumers in their natural environment when they are buying and using a product. This research helps brands better understand consumer motivations, pain points and the usage occasions. As a result, they can tailor the product, packaging and messaging to the right consumers because they understand the context in which their products are used. They also understand the crucial consumer needs and frustrations in that occasion. This enables them to identify the most important opportunities for innovation. These days online ethnography is a less expensive and time-consuming alternative to in-person.

Moisturizers are again a good example. Over the course of a week, 20 consumers participated in an online video ethnography in which they went on a shopping trip, participated in discussions,

showed us around their house and talked us through their experience with the product. Learnings indicated that in different occasions and life stages, consumers' most important needs varied.

These needs can include:

- **Time of day:** Morning, evening and daytime usage required different product formulations and packaging.
- **Comfort:** Some consumers' goals were to maintain skin hydration to avoid irritation and maximize skin comfort.
- **Combat aging:** Many consumers want the moisturizer to help minimize and decrease aging skin's feel and appearance, allowing them to age gracefully and with confidence.
- **Clean and natural:** Consumers may want to use only natural and clean ingredients to keep their skin safe and chemical-free, while also protecting the environment.
- **Routine maintenance:** For others moisturizer usage is for routine maintenance for the look and feel of skin hydration.

#2 Simulated Environments

Consumers have different perceptions of what beverages are appropriate, refreshing or comforting in different seasons. We tested this concept, simulating summer and winter scenes. To do so, we created rooms resembling those environments, including screens showing summer or winter scenes, adjusting the room temperature, bringing in other seasonal indicators (sand and beach chairs for summer, snow and a fireplace for winter, etc.). We provided the same drinks to subjects in both environments and in a lab CLT. We then compared their drink impressions and preferences.

CLT ENVIRONMENT



SIMULATED WINTER



SIMULATED SUMMER



The findings showed that the context did indeed influence the beverages perception and acceptance. In the summer simulated environment liking was higher, and consumers perceived the test beverage to be thirst-quenching, relaxed and familiar. In the winter environment the beverage was not as well liked and was found to be more comforting and indulgent. The CLT environment most closely resembled the emotions associated with the summer environment. The results confirmed the importance of matching the context with the product and usage occasion and that consumer perception of the same product changes in different contexts.

FUNCTIONAL AND EMOTIONAL TERMS CHOSEN MOST OFTEN FOR SPECIFIC ENVIRONMENTS:

SUMMER	WINTER
Thirst Quenching	Refreshed
Familiar	Happy
Refreshed	Comforting
Relaxed	Indulgent
Happy	Enjoyment
	Replenished / Restored

Simulating a store experience can also help brands understand consumer behavior. While it is possible to send consumers shopping and have them record their experience, sometimes you need to dig deeper into consumers' opinions and beliefs or just to collect large numbers of responses that can be statistically analyzed. In this case, we have used either a 'virtual' digitized shopping shelf or set up a shopping experience in one of our facilities. One client asked us to simulate a Walmart candy aisle so they could better understand which packaging stood out, why it caught consumers' attention and how different types of consumers were drawn to various packaging types. The results allowed them to optimize their packaging and better cater to different consumer demographics.

#3 Simulated Experience

The usage occasion includes more than just the external environment; it includes what you are doing and your physical (tired, hot) and mental (motivation, emotion) state. Much like a simulated environment, simulated experiences can be used to mimic the usage occasion for products. To get a more authentic experience, we tested sports recovery drinks for one client by creating an internal spinning studio. We hired a certified instructor and monitored participants resistance, speed, and heart rate to assess performance and effort. This ensured that the experience matched the real-world usage context while evaluating the sports drinks.

During the spinning class, the participants consumed the drinks and reported their opinions of the in-market control and test products at various points in the workout. This experiment provided contextualized results, with the drinks consumed in the same way as in the real world. They reflected consumers' perceptions and needs in the occasion.



In another example, a leading food manufacturer was concerned that their meal kit product, which tested well when fully prepared, was under-performing. To gain a deeper understanding, we suggested having consumers come into our kitchens and prepare the meal themselves, according to the instructions on the box. The clients' marketing and development teams were able to observe and ask questions. We learned that the product did not deliver on the promise of freshness and that the instructions were ambiguous. As a result, the client modified the instructions, ingredient appearance and communication—leading to improved performance.



#4 Real World

It is one thing to create the perfect product in the lab or product kitchen, and to deliver it to consumers in perfect form. It is another thing to understand the consumers' experience and frustrations when using that same product in the real world. Think about testing a new burger, sold at a quick serve restaurant (QSR). The same person can have different impressions of the burger based on their usage occasion. Pick up the burger for a meal eaten in the parking lot or while driving, and the burger better not ooze sauce. Take that same burger home, where it's eaten at the table with plenty of napkins (and a sink nearby) and that juicy burger hits the spot in a way that would be a disaster in the car.

Now imagine that burger is passed through a drive-through window or picked up by a delivery service. By the time you eat it, does it still look good? Is it in one piece? It may still taste delicious, but if the burger is not designed to travel, the appearance can affect the likelihood of future purchases. Understanding the actual consumer experience in the real world can lead to different insights and opportunities.

#5 In-Home Use Testing (iHUT)

In-home testing is an ideal way to see how a consumer would use the product in their own environment. We worked with a company introducing a new baking paper, and the goal was for the paper not to curl when placed on the baking sheet. We sent prototypes to 41 subjects to test at home, and they provided a video diary showing how they unwrapped the paper from the roll and used it and completed an online survey to share their opinions. We followed up with the subjects via virtual interviews, and then with select individuals in person to gather more information.

While the paper was OK overall, we learned that the subjects did not read the directions and were frustrated by too many steps. By simplifying the instructions and tweaking the paper to make it easier for consumers to use properly, the company went to market with a better product.

WHAT USAGE OCCASION MEANS FOR BRANDS

Consumer needs change based on the usage occasion. They look for different benefits from the same product depending on the occasion. Whether it be milkshakes, coffee, moisturizer or baking paper. It's vital to understand the different usage occasions and consumers' desired benefits to develop the right product for the right occasion.

The first-time consumer needs to be given a reason to believe that they should choose this product. So, the initial step is to set up the promise that the product will deliver satisfaction by addressing the consumers' needs better than other options available—this is where effective branding communications claims and packaging come into play. The second step is to develop a product that delivers on that promise. If it addresses their needs and provides satisfaction, they will buy it again for the same usage occasion. If not, there will be no repeat purchase. To achieve both these steps, it is essential to understand how, when and why consumers are using your product—i.e., the usage occasion. To ensure the product does that, brands need to understand the usage occasion and test in the proper environment.

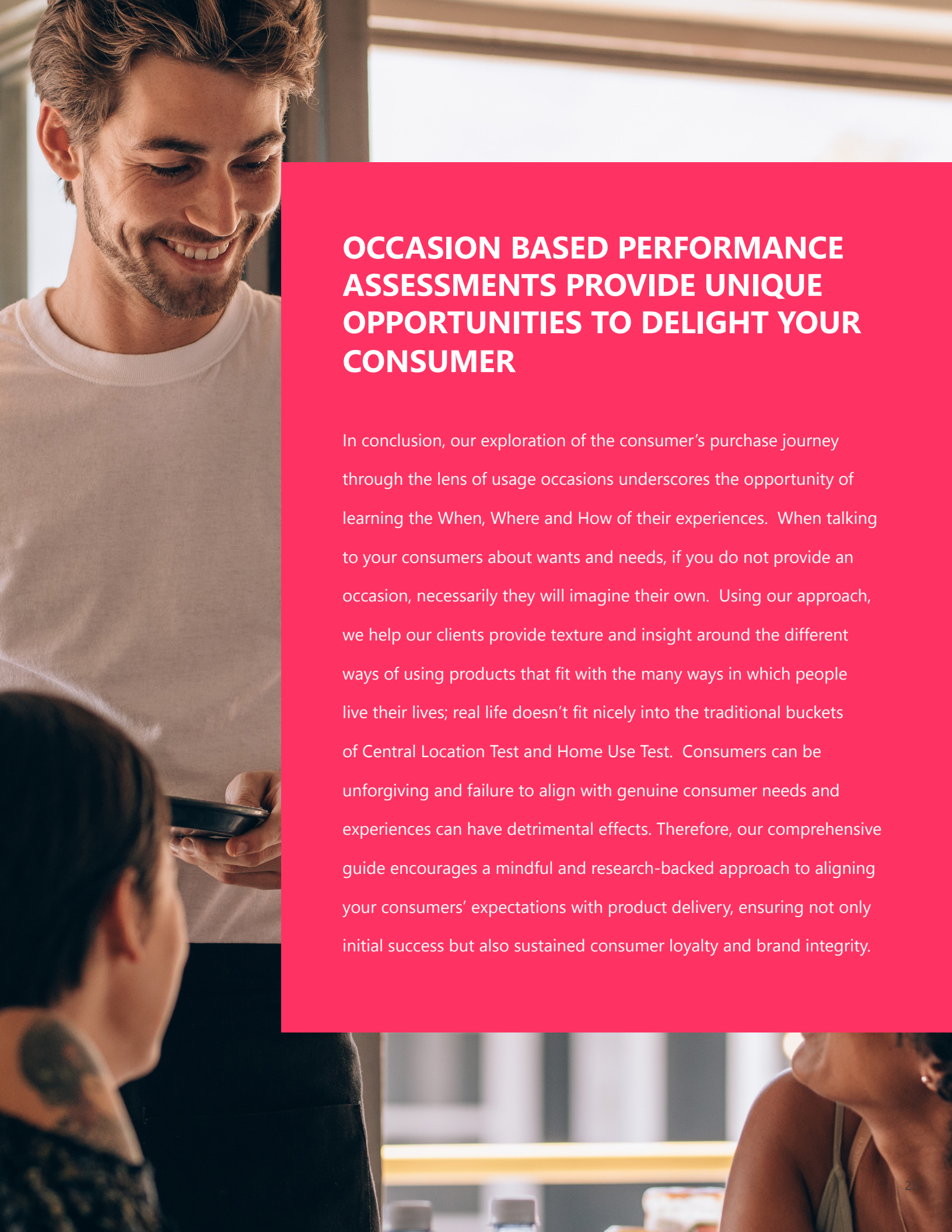


Context has a major impact on consumer expectations and emotions. Some products are perceived as fitting better into a specific context than others. Chocolate is better received in a café environment than in the workplace. Sports drinks, meant to be consumed while exercising, will get more accurate assessments during a workout compared to sitting in a neutral testing room. A fast-food burger eaten inside a QSR may not be the best burger to order from DoorDash. Context matters. Consumers will have better opinions of products when its benefits are congruent with the usage occasion.

Moisturizers with thick formulations may not do well for daytime use, but may fly off the shelves when advertised for nighttime moisture replenishment. Test the moisturizer for the wrong usage occasion, and the product is less likely to perform well. Brands should create the appropriate context when testing their products, as alignment between the product and consumption environment is key.

Contextual testing helps brands understand consumers' needs and frustrations (sensory, emotional and functional) when using the products. It reveals their expectations and requirements for satisfaction. Products that are congruent with consumer expectations and context can result in a different sensory and emotional experience. And this can make the difference between a product succeeding and failing.





OCCASION BASED PERFORMANCE ASSESSMENTS PROVIDE UNIQUE OPPORTUNITIES TO DELIGHT YOUR CONSUMER

In conclusion, our exploration of the consumer's purchase journey through the lens of usage occasions underscores the opportunity of learning the When, Where and How of their experiences. When talking to your consumers about wants and needs, if you do not provide an occasion, necessarily they will imagine their own. Using our approach, we help our clients provide texture and insight around the different ways of using products that fit with the many ways in which people live their lives; real life doesn't fit nicely into the traditional buckets of Central Location Test and Home Use Test. Consumers can be unforgiving and failure to align with genuine consumer needs and experiences can have detrimental effects. Therefore, our comprehensive guide encourages a mindful and research-backed approach to aligning your consumers' expectations with product delivery, ensuring not only initial success but also sustained consumer loyalty and brand integrity.

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