TECC Support

Consumer Testing:
A "How-To" Guide
for Educational Materials

Topics in this guide

Once you have created your educational materials, you will need to consumer test them before you start using them in the field. This will ensure that the materials you designed will have the most impact in your community.

Note: This guide presents best practices for consumer testing (sometimes called field testing). Often, there are mitigating circumstances that may affect the decisions you have to make along the way. Please check in with your California Tobacco Control Program (CTCP) Consultant if you are unsure about any part of the consumer testing process.

Why is Consumer Testing Required?

It improves the effectiveness of your material by:

• Working directly with your intended audience (your "consumer")

• Finding out if the message and design are appealing

• Finding out if your images and language are culturally appropriate

• Testing whether your message and action steps are clear and easy to understand

Methods of Consumer Testing

There are many ways to gather feedback to improve your materials. These are three common methods:

Surveys

What they are: Material is sent to members of your intended audience by email or using a survey program. Participants view the material remotely and answer survey questions. Questions can be multiple choice, rating scales, or open ended.

Benefits: Good for gathering a broad range of responses and allows you to easily view and compare data. Surveys can be administered online, in person, or on mobile devices. Surveys are inexpensive, easy to administer, and can reach a large and diverse audience who can respond at their leisure.

Challenges: It's more difficult to capture rich data and ask follow-up questions. Also, response rates can be low and may be biased if the people who really like, or really dislike, your material are more apt to respond.

Interviews

What they are: An interviewer meets one-on-one with members of your intended audience. Participants review the material and answer questions about it while the interviewer takes notes and asks follow up questions. Interviews can also be implemented over the phone if you can send materials prior to the interview.

Benefits: Good for in-depth feedback, especially if the topic is of a sensitive nature. Interviews often are easier to coordinate than focus groups because you can meet with people at their convenience. Interviews give individuals more time for feedback and allow you to hear from people who might be intimidated in a group setting.

Challenges: You may miss insights that come from conversations between participants gathered in a group. They can be time and resource intense because you are collecting information from only one individual at a time.
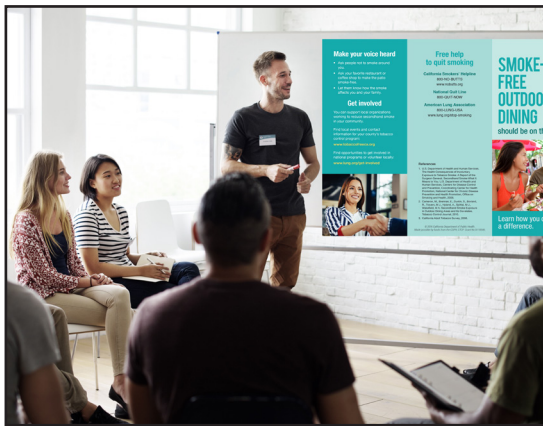
Focus Groups

What they are: Members of your intended audience meet together to review material and answer questions. A skilled facilitator leads the group discussion and asks follow up questions. Participants may vote on options, share ideas, and write out additional feedback as needed. Generally, the discussion is recorded and someone from the developing agency is assigned to take notes.

Benefits: Good for obtaining rich feedback from a group of participants who share similar characteristics. The group interaction allows for extended discussion between the participants and may spark new ideas for the material.

Challenges: It can be more difficult to discuss sensitive topics. Different stakeholder groups or populations may not be able to participate in the same group. It's also important to be aware of, and control the group dynamics that can arise, to ensure all participants are able to freely share their feedback. Logistical challenges include finding a time that works for all group members, finding a location to hold the group, and finding a skilled facilitator.

> When deciding on a consumer testing method, consider the **type** of material you are testing, your **timeline,** your **resources** and the **intended audience**.

Scheduling Your Testing

Testing can be conducted at several stages of material development. Ideally you will conduct initial testing in the early stages of development by using draft concepts of the material. This will help narrow down your choices before too much time or resources have been invested in developing the materials. At a minimum, testing needs to be conducted on the final material before it's printed or distributed.

> Ideally you can schedule consumer tests during 2 development phases; the first to test your **draft concept** and the second to test the **final design.**

Will this appeal to seniors in multi-unit housing?

Identifying Your Objectives

Before planning your consumer test and drafting your discussion guide, identify the main questions you want answered. As you are developing your material, it is helpful to jot down questions you have along the way and include those questions in your guide.

In general, you'll want to obtain feedback from your intended audience on these areas:

- Are the images or design appealing?
- Is the reading level appropriate?
- Is the material culturally relevant?
- Are the key messages or action steps clear?
- Is the information convincing and usefulness?
- How likely are they to take action or share the material?
- What is the best format (e.g. brochure, postcard)?

Defining Your Intended Audience

Identifying the right people for your consumer test is the most important part of testing. Decide on the key demographics of your participants for each phase of development. For example, in the early stages of concept development, you might want to talk to content experts, your Program Consultant, statewide agencies, partners and even material distributors. In later stages, it is crucial to test your materials with members of your intended audience.

Are you:
- a young adult 18-24?
- a hookah smoker?
- living in Los Angeles?

We want your feedback!

Which demographics are a key part of your intended audience?

- Age
- Gender identity
- Sexual orientation
- Geographic location
- Smoking/tobacco use

- Education level
- Socio-economic status
- Cultural background
- Languages spoken
- Decision maker status

- Other behavioral or characteristics (e.g., people who say they care about the environment)
- Civic mindedness (voters, active in community)

Who should not be a participant?

Generally, the following individuals would not be good candidates as consumer testers, particularly at later phases in material development:

- Anyone involved in the development of the material
- Co-workers
- Your mom
- Anyone who's not a member of your intended audience
- Gatekeepers – at final stages go straight to the source

Recruiting Participants

Finding willing participants who are part of your intended audience can be challenging. A few strategies to try:

- Begin recruiting before the material is ready. Collect contact information from interested participants to build a pool to call on when you are ready for testing.
- Place an invitation on your website or send out in an email blast or newsletter.
- Brainstorm recruiting ideas with your coalition.
- Schedule your test before, after or during another event that your intended audience would attend.
- Plan a visit to a location your intended audience frequents (e.g. health clinics, WIC centers, cessation classes).
- Schedule your test at a convenient time for your participants (e.g. after work, lunchtime, weekends).
- Offer incentives for participants.

Incentive Ideas

Gift cards	Gift Certificates	Food and beverages

Developing Your Discussion Guide

If you are using interviews or focus groups for testing, you will need to develop a discussion guide. The guide generally consists of five sections: an introduction, a demographic screen, the presentation of materials or ads, the main discussion, and a final thank you to participants.

Demographic screen: collects anonymous demographic information on what you need to know about your intended audience. You may want to add more specific questions here that pertain to your campaign. Only collect information you intend to use. If you are conducting surveys from a random sample, this can also serve as an eligibility screen. Based on the responses, you may need to thank and excuse some participants if they are not part of your intended audience.

Introduction: explains where you are from, the purpose of the group, invites participants to be honest and puts them at ease about the confidentiality of their comments

Material presentation: multiple designs of your material are presented to the group or individual. You may also want to provide a note-taking template for your participants to jot down their individual reactions to the material.

Main discussion: skilled facilitator or interviewer leads participant through a sequence of questions. Some general guidelines for developing focus group or interview questions:

- Ensure that questions are open-ended, not closed-ended. Avoid yes/no questions. Instead, have questions that encourage rich and informative answers.
- Ask questions that are short and one-dimensional (one idea at a time). The longer the question, the easier for participants to be confused, lose the train of the discussion or get distracted.
- Any terminology used in the material should be reviewed to make sure it is understandable to the audience.

Thank you and wrap up: facilitator or interviewer thanks participants and hands out incentives, if provided. Here you can collect any notes that participants have jotted down during the material presentation.

See our sample templates

Note: These are sample templates to get you started. They are not intended to be used as is, and will need to be modified and adapted to make sense for your particular testing situation.

Planning the Logistics

Focus groups and interviews

- If your material is long (e.g. a toolkit or guide), you may want to send it out prior to testing, or allow time for your participants to read and interact with it before beginning the interview or discussion.

- Be sure that your set up allows for easy interaction with the material or it can be viewed on a large screen.

- Think about confidentiality. Is it okay if participants take samples or discuss the material outside of testing?

- Decide how you will record the discussion. A simple tape recorder, phone or video camera should work.

- Assign someone to take notes.

- You will need signed parental/guardian consent forms if participants are under age 18.

- Prepare paperwork including demographic cards and/or questionnaires.
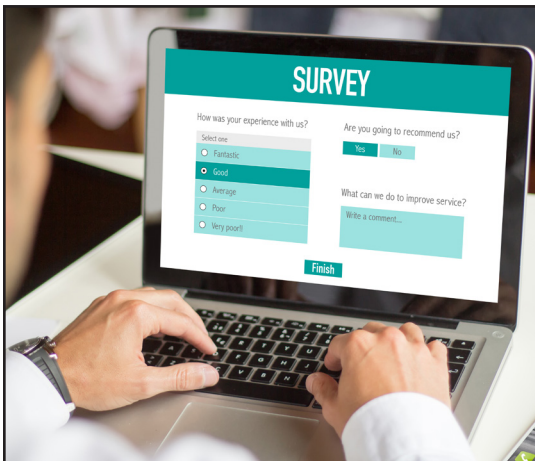
Surveys

- Surveys can be sent via e-mail or by using an online survey tool such as www.surveymonkey.com. Choose the method that works best for your intended audience.

- You will need to collect email addresses of your intended audience. Look for partners in the community who can share contact information with you.

- Consider likely response rate. You will need to send out many surveys to ensure enough responses.

- Assign someone who can develop, test, revise and administer the survey.

- Allow time for follow up. Someone will need to track responders and remind those who didn't respond initially.

- Offer incentives when possible, to increase response rate.

See our sample template

Sample Analysis Template p.14

Using Your Results

These guidelines will help with the process of summarizing and analyzing your testing results.

Note: Be sure to delete participant names and any identifiers before synthesizing results.

Some feedback will be simple: did participants understand the message; did they like the look and feel; would they use the material? Some are more complicated: what key messages are most important to include; what action steps do we want users to follow?

- Look for the common ideas and themes, and assess how frequently those ideas and themes appeared among participants.

- Some ideas are critical even if only one person said it; for example, if someone finds an image offensive, it's probably best to avoid it.

- Some comments may conflict, and you'll need to use your judgment when deciding how to use those responses. You should let participants know that not all suggestions can be implemented in the current version.

- Sometimes participants feel compelled to give opinions even if they are not strong. An individual may prefer a different graphic, but whether or not that graphic is changed may have no bearing on use or impact.

- If the testing included information from different sub-groups, review differences across sub-populations. If responses varied widely, consider whether it is feasible to produce different materials for different sub-populations.

- Revise materials as needed based on testing results. If materials need to change substantially, you might need to retest the new material.

Be prepared to revise the **design, images, text, message,** and even **format** of your material based on testing results.

Consumer Testing Resources

Focus groups

Best Practices in Research & Evaluation: Focus Groups. Education, Training and Research (ETR). 2013.
http://pub.etr.org/upfiles/etr_best_practices_focus_groups.pdf

Designing, recruiting for and facilitating focus group sessions. Tobacco Control Evaluation Center.

http://tobaccoeval.ucdavis.edu/data-collection/DataCollectionMethods.html

Coding and analyzing qualitative data. Tobacco Control Evaluation Center.
http://tobaccoeval.ucdavis.edu/analysis-reporting/AnalyzingData.html

Representing qualitative results visually. Tobacco Control Evaluation Center.
http://tobaccoeval.ucdavis.edu/analysis-reporting/DataVisualization.html

Intercept interviews

Best Practices in Research & Evaluation: Interviews. Education, Training and Research (ETR). 2013.
http://www.etr.org/ebi/assets/File/etr_best_practices_interviews.pdf

Interviews. Research Methods Knowledge Base.
https://www.socialresearchmethods.net/kb/intrview.php

Online surveys

Best Practices in Research & Evaluation: Surveys. Education, Training and Research (ETR). 2013.
http://pub.etr.org/upfiles/etr_best_practices_surveys.pdf

Conducting online surveys. Sue, VM, Pitter, LA. 2012. Sage Publications, Inc.
https://us.sagepub.com/en-us/nam/conducting-online-surveys/book235512

Most online survey software will have educational guides, for example:
https://www.surveymonkey.com/mp/concept-testing/
https://www.surveymonkey.com/mp/product-feedback-surveys/

SAMPLE DEMOGRAPHIC SCREEN/CARD

This is a sample of the demographic information you might want to collect from your participants. Add any other questions you may need to know about your intended audience. Do not collect information unless you need to know it or intend to use it.

Gender

☐ Male

☐ Female

☐ Transgender

Age

☐ 12 and under

☐ 13 to 17 years

☐ 18 to 24 years

☐ 25 to 30 years

☐ 31 to 40 years

☐ 41 to 50 years

☐ 51 and above

Ethnicity (mark ALL that apply)

☐ American Indian or Alaskan Native

☐ Asian

☐ Black or African American

☐ Hispanic or Latino

☐ Native Hawaiian or Pacific Islander

☐ White

☐ Other

Tobacco/Vape Use

Please indicate which is the best way to describe your use of tobacco or vaping.

☐ Never smoked

☐ Occasional smoker

☐ Current smoker

☐ Currently trying to quit

☐ Successfully quit smoking (not smoked for at least 30 days)

Other: _____

SAMPLE INTRODUCTION

Note: This is an introduction to a focus group, but can be modified for intercept interviews or surveys.

Title of material that is being tested: _____

Focus Group Date: _____ Number of participants: _____ Location: _____

Facilitator/ Interviewer: _____ Intended Audience: _____

Introduction

[Have an introduction that will explain where you are from, the purpose of the group, invite focus group participants to be honest and put them at ease about the confidentiality of their comments.]

Who:

Welcome to our field testing focus group. My name is _____, and I'm from _____ (add in agency name). [Add in a short sentence about the agency you represent].

Why:

We are here today to look at some tobacco prevention materials. Thank you for joining us to help us test materials we are hoping to use with others like yourselves. Having materials tested before they are distributed provides developers with valuable information and feedback they can use to make improvements to the materials.

Confidentiality and Group Agreements:

Your honest feedback is critical. None of the developers are here today and you are not going to hurt my feelings! Your responses will be kept private and confidential. We really want to hear from you. Each of you might have different opinions about the materials and we want to assure you that it is completely fine to disagree with someone else's opinion. Our intent is to gather as much feedback as we can about the material as possible. We will also be audio-recording today's group. If you are uncomfortable with being recorded, please let us know before we begin the group.

Participant Profile:

Before we begin our discussion, we would like to have you fill out a short demographic card about yourself. The questions are optional. You may choose to skip any of the questions you are not comfortable answering. However, we hope you will share your responses, as it helps us understand if we're reaching the intended audience of the materials.

[Hand out demographic screens. Collect completed cards and seal envelope]

Background Information on Material *(Optional):*

Thank you. Before we pass out the materials, here's some background information on these materials. [Facilitator reads information out loud.]

SAMPLE MATERIAL PRESENTATION

Here are some ideas to structure the material presentation and different ways to collect notes from your participants.

SHOW MATERIAL/IMAGE/AD:

- Reveal material one at a time.

- Rotate order of material from group to group or participant to participant.

PARTICIPANT NOTES:

- Prior to the main group or individual discussion, participants can write down their individual reactions on a worksheet.

- Having participants write down their initial reactions before participating in a group discussion helps participants not get swayed by other, possibly more dominating group participants.

- The notes packet could have graphic images of parts of the materials and lines next to it for notes.

- The note template can also be structured by one or two questions or icons/ emojis to help participants record their initial response as each material is shown. For example:

  o What do you think is the main message or idea of this material?

  o How does this material make you feel?

  o What is your most favorite part/ least favorite part?

- The notes packet could even be a blank piece of paper for participants to jot down any reactions they want.

SAMPLE DISCUSSION QUESTIONS

Choose the questions that work best for your spedific material and objectives. Not all of these questions are relevant for all testing situations, and questions for your objective may not be listed here. For surveys, it is best to provide response options for as many questions as possible, and include only a few questions that require a written response.

For interviews and focus groups, use these probes to encourage discussion:

a. Tell me more.

b. Do you have any examples to share?

c. Describe what that would look like.

d. What do others think?

e. Who can add more to this idea?

f. Are there any specific questions or issues regarding this material/image?

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1. Testing content and approach

a. What do you think is the main message of the material?

b. Without looking again at the material, what was the most memorable part about the material?

c. What words were difficult to understand or new to you?

d. What element most grabs your attention?

e. In your own words, what do you think the material is trying to say?

f. What else is missing?

2. Testing appropriateness of action steps

a. What are some actions you might consider taking after reading the material?

b. Is there anything specific you would do after seeing this?

c. Which pieces of information in the material were new to you?

d. Are there parts that are confusing or unclear?

3. Testing images/ads

a. How well do you relate to this image/ad?

b. What is the overall impact of this image/ad? (repeat for image that you are testing)

c. How well does the image/ad represent you?

d. Is there anything about the image/ad that makes you uncomfortable?

e. How does the image/ad make you feel?

f. What emotion are you experiencing when you look at this image/ad?

g. How would you rank these, starting with the most memorable image/ad.

4. Testing overall design (look and feel)

a. What do you like about the colors used in this material?

b. How likely would you be to pick up this material when placed among other brochures?

c. What do you think about the length of the material?

d. Please look through the material and comment on the size and type of font used.

Sample Analysis Template

Here is a sample analysis template you may modify and use when analyzing data from your consumer tests.

Section 1: Identifying information

Method(s):

- o Focus group   → Number of groups:

                              → Number of participants in each group:

- o Intercept interview   → Number of participants:

- o Survey   → Number of participants:

Demographic Characteristics:

Other important information about participants:

Section 2: Specific purpose of testing and primary questions

Section 3: Material Strengths

Section 4: Recommendations for Improvement

Section 5: Actions Taken