

# CONSUMER TESTING FOR EDUCATIONAL MATERIALS



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Tobacco Education  
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## Section 1: Introduction to Consumer Testing for CTPP-funded Projects

Many projects funded by the California Tobacco Prevention Program (CTPP) are required to create educational materials as part of their scope of work. Educational materials may include fact sheets, brochures, posters, and other types of print materials. Before these educational materials can be used in the field, they need to be consumer tested.

Consumer testing, sometimes called “field testing,” ensures that the materials you designed will have the greatest possible impact in your community. Consumer testing improves the effectiveness of your material by:

- + Engaging directly with your intended audience (your “consumer”).
- + Finding out whether the message and design are appealing.
- + Determining whether your images and language are culturally appropriate.
- + Testing whether your message and action steps are clear and easy to understand.

This guide highlights best practices for consumer testing. Please check in with your CTPP Program Consultant if you are unsure about any part of the consumer testing process.



## Section 2: When to Consumer Test

Testing can be conducted at one or several stages during material development. At a minimum, testing needs to be conducted on the final material before it's printed and/or distributed. However, if time and resources allow, you can conduct initial testing in the early stages of development by using draft concepts of the material. **Early testing** can help you narrow down your choices before you invest too much time or resources in developing the material.

Ideally you can schedule consumer testing during **two development phases**:

- + Early on to test your **draft concept**
- + At the end to test the **final design**

## Section 3: Methods of Consumer Testing

There are many ways to gather feedback to improve your materials, and each method has unique benefits and challenges. Each project should choose a method that fits project capacity and resources, is aligned with its goals, and that is appropriate for its intended audience.



### Focus Groups

**What they are:** Members of your intended audience meet as a group to review the material(s) and answer a set of pre-developed questions. A skilled facilitator leads the group discussion and can ask follow-up questions. Participants may vote on options, share ideas, and write out additional feedback as needed. When you organize a focus group, you typically have a facilitator who runs the group, a co-facilitator or note taker, and 6 to 10 participants. Focus groups with youth usually have fewer participants (5-7) because they can be more difficult to keep on task. Focus groups can be done in person or virtually.



### Interviews

**What they are:** An interviewer meets individually with a member of your intended audience. The participant reviews the material(s) and answers a set of pre-developed questions while the interviewer takes notes and asks follow-up questions. You can conduct interviews over the phone, if you send materials to participants prior to the interview, or virtually (e.g. Zoom).

### Paper Surveys

**What they are:** The material(s) and survey questions are presented to your intended audience in person or via mail, most often through written questionnaires.

### Online Surveys

**What they are:** The material(s) and survey questions are sent to members of your intended audience by email, or through a survey platform such as SurveyMonkey or Google Forms.

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

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## Section 3: Methods of Consumer Testing *(continued...)*

### Focus Groups

Benefits	Challenges
<ul style="list-style-type: none"><li>+ Generate, explore, and identify key ideas/concepts.</li><li>+ Read non-verbal feedback.</li><li>+ Can assist participants with unfamiliar words or questions.</li><li>+ Questions can be asked as they arise.</li><li>+ Participants can build on each other's comments.</li></ul>	<ul style="list-style-type: none"><li>- Bias / Small Group.</li><li>- Quality of data influenced by the moderator.</li><li>- It can be more difficult to discuss sensitive topics.</li><li>- Managing and guiding the group dynamics to ensure all participants can freely share their feedback.</li><li>- Finding a time and location that works for all group members.</li><li>- Need trained interviewers or moderators.</li></ul>

### Interviews

Benefits	Challenges
<ul style="list-style-type: none"><li>+ High rate of survey completion.</li><li>+ Good for in-depth feedback, especially if the topic is of a sensitive nature.</li><li>+ Easier to coordinate than focus groups.</li><li>+ Can assist people with unfamiliar words or questions.</li><li>+ Can hear from people who might be intimidated to speak in a group setting.</li></ul>	<ul style="list-style-type: none"><li>- Difficult to reach certain populations.</li><li>- Expensive and time consuming because the interviewer collects information from only one individual at a time.</li><li>- Some may feel reluctant to share personal information or beliefs.</li><li>- Need trained interviewers.</li><li>- Must find a suitable place to conduct the interview.</li></ul>

*(Continued...)*



## Paper Surveys

### Benefits

- + Physical survey and materials are less likely to be lost.
- + The data from surveys are simpler and less time-consuming to analyze.
- + Can assist respondents with unfamiliar words or questions, if conducted in person.
- + Can be anonymous or confidential.

### Challenges

- No clarification available during completion, if done through the mail.
- Respondents must be able to read, see, and write, or have access to accommodations to assist them with any limitations.
- It does not allow for in-depth responses.
- Respondents can jump from section to section to complete the survey.

## Online Surveys

### Benefits

- + Participants can view the material remotely and independently.
- + Faster way to reach the target audience.
- + Real-time analysis.
- + Cost-efficient.
- + Surveys can be completed online and on mobile devices.
- + Respondents may be more truthful.

### Challenges

- Need reliable access to the internet.
- System can go down or be unreliable.
- Respondents must be able to use a computer or mobile device or have access to accommodations to assist them with any limitations.
- Cannot ask respondents immediate follow-up questions.



## Section 4: Identifying Your Objectives

Before planning your consumer test and drafting your discussion guide (**found in section 7**), you will need to identify the main questions that you want answered. As you are developing your material, it is helpful to jot down your questions so that you do not forget them.

Some examples of guiding questions that you may want to consider are included below:

- + Are the images and/or design appealing?
- + Is the reading level appropriate?
- + Is the material culturally appropriate and relevant?
- + Are the key messages and/or action steps clear?
- + Is the information convincing and useful?
- + How likely are the participants to take action (based on the material's call to action) or share the material?
- + What is the best format for this material (e.g., brochure, postcard)?



## Section 5: Defining Your Intended Audience

Identifying the right people for your consumer testing is the most important step. The most appropriate choices for participants may depend on the phase of development. For example, in the early stages of concept development you might want to talk to content experts, your CTPP Program Consultant, statewide agencies, partner organizations, and even material distributors. In later stages, testing your materials with members of your intended audience is crucial to the success of the material.

### What are the key demographics 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 characteristics (e.g., people who say they care about the environment)
- + Civic mindedness (e.g., voters, people who are active in their community)



### Who should not be a participant?

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

- + **Anyone involved in the development of the material.**
- + **Co-workers.**
- + **Anyone who's not a member of your intended audience.**
- + **Gatekeepers.**



## Section 6: Recruiting Participants

It can be challenging to find members of your intended audience who are available and willing to participate.

### A few recruitment strategies include:

- + Starting before the material is ready. You can collect contact information from interested participants and build a pool of people to call on when you are ready for testing.
- + Posting an invitation on your website, social media platform, or in an email blast or newsletter.
- + Brainstorming recruitment ideas with a coalition who works or is made up of members from your intended audience.
- + Scheduling your testing before, during, or after another event that your intended audience will likely attend.
- + Planning a visit to a location your intended audience frequents  
*(e.g., health clinics, WIC centers, cessation classes).*
- + Scheduling your test at a convenient time for your participants  
*(e.g., after work, lunchtime, weekends).*
- + Offering incentives for participants  
*(e.g., gift cards or certificates, food and beverages).*

If you are **offering incentives**, make sure to check CTPP's policy guidelines and your scope of work for any limitations.



## Section 7: Planning the Logistics

### Focus groups and interviews

- + Focus group conversations usually last between 1 to 1.5 hours, in order to allow for a full discussion of the topic.
- + 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.

You may need to think about confidentiality—Is it okay if participants take samples or discuss the material outside of testing?

- + Only a few open-ended questions, written at a general level, are needed to focus the group discussion. Probing sub-questions can be used to get more detail.
- + A skilled moderator is needed to:
  - (a) encourage a truly open discussion of the questions,
  - (b) keep the discussion focused on the major issues,
  - (c) ask follow-up questions to achieve a deeper understanding,
  - (d) manage dominant participants, and
  - (e) encourage quiet participants to contribute to the conversation.
- + Focus groups should take place in a comfortable and quiet setting. Ideally, the participants are seated at a round table so that they can all see each other. Most focus groups provide some light refreshments for participants.
- + Decide how you will keep record the discussion. A tape recorder, phone, or video camera can work but some participants may not feel comfortable with you using them. Always be prepared to take written or typed notes. Ideally, a person other than the facilitator would take notes during the interview or discussion.
- + You will need signed parental/guardian consent forms if participants are under the age of 18.

(Continued...)

## Section 7: Planning the Logistics *(continued...)*

### Online Surveys

- + Identify someone who can develop, test, revise, and administer the survey.
- + Surveys can be sent via e-mail or by using an online survey tool such as Survey Monkey or Google Forms. Choose the method that works best for your intended audience.
- + You will need to collect the email addresses of your participants.
- + Consider the response rate. You may want to send out surveys to more participants than you need to ensure that you receive enough responses.
- + Allow time for follow-up. Someone will need to track responders and send reminders to encourage everyone to respond. Offer incentives, when possible, to increase the response rate.

### Paper Surveys

- + Identify someone who can develop, test, revise, and administer the survey.
- + Decide where you will find your intended audience to conduct your survey. This could be at a community event or coalition meeting.
- + Have enough copies of the material(s), surveys, and pencils or pens for participants.
- + Emphasize that participant's responses are confidential or anonymous.
- + Help participants if they have any questions while completing the survey.
- + Offer incentives, when possible, to increase the response rate.



## Section 8: 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 four sections:

(1) an introduction, (2) the presentation of materials, (3) the main discussion, and (4) a final thanks to the participants.

**Introduction:** Explain your role in the testing and the purpose of the interview or focus group. Invite participants to be honest and put them at ease about the confidentiality of their comments.

**Material presentation:** Reveal the material(s) one at a time and rotate the order of materials between groups or participants. Prior to the group or individual discussion, you can ask participants to write down their individual reactions on a notes template or worksheet. When participants write down their initial reactions before participating in a group discussion, they are less likely to be swayed by other participants. The notes template can be a simple blank piece of paper with no specific prompts, or it can include a few questions or prompts.

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

- + Ensure that questions are open-ended (e.g., avoid questions that can be answered with only yes or no). Questions that encourage robust, informative answers will yield the most helpful responses.
- + Ask questions that are short and one-dimensional (one idea at a time). The longer the question, the easier it will be for participants to become confused, lose their train of thought during discussion, or get distracted.
- + Any industry or technical terminology used in the material should be reviewed to make sure it is understandable and relatable to the intended audience.

**Thank you and closing:** The facilitator or interviewer thanks participants and hands out incentives, if applicable. At this stage, you can collect any notes that participants have taken during the presentation. It is also a good idea to collect any distributed materials that were shared so that participants do not accidentally take and share them.



### See our sample templates:

- + Sample Opening for Focus Group or Interview **[Page 15]**
- + Sample Discussion Questions **[Page 16]**
- + Sample Testing Summary **[Page 18]**

These sample templates will help you get started, and are not intended to be used exactly as they are. Please update to fit your particular testing situation.



## Section 9: Reviewing and Summarizing Your Results

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

After consumer testing is completed, you will want to review the results and summarize them.

**A consumer testing summary can include the following:**

**(1)** participant information and demographics, **(2)** format, purpose, and questions used during testing, **(3)** material strengths, **(4)** recommendations for improvement, and **(5)** next steps. When summarizing results, it is important to delete participant names and any demographics that could result in a participant being identified.

**Some questions to ask yourself as you review the feedback include:**

- + Did participants understand the message?
- + Did they like the look and feel?
- + Would they use the material?
- + What key messages are most important to include?
- + What action steps do we want readers to take?

*(Continued...)*

## When deciding what to include in your summary:

- + Look for common ideas and themes and assess how frequently those ideas and themes appeared among participants.
- + Some ideas are critical even if only one person brought them up. For example, if someone finds an image offensive it's probably best to remove or replace 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 final version.
- + Sometimes participants feel compelled to give opinions even if they are not strong. An individual may prefer a different graphic, but whether that graphic is changed may have no bearing on use or impact.
- + If the testing included information from different subgroups, review differences across these subgroups. If responses varied widely, consider whether it is feasible to produce different materials for different subgroups.
- + Revise materials, as needed, based on testing results. If materials need to change substantially, you might need to retest the new material.



# Section 10: Consumer Testing Resources

## Focus groups

**Best Practices in Research & Evaluation: Focus Groups. Education, Training and Research (ETR). 2013.**

[https://www.etr.org/ebi/assets/File/etr\\_best\\_practices\\_focus\\_groups.pdf](https://www.etr.org/ebi/assets/File/etr_best_practices_focus_groups.pdf)

**Conducting Focus Group Interviews. Tobacco Control Evaluation Center.**

<https://tobaccoeval.ucdavis.edu/sites/g/files/dgvnsk5301/files/inline-files/2018-05-17-TT4-Focus%20Group%20Interviews.pdf>

## 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](http://www.etr.org/ebi/assets/File/etr_best_practices_interviews.pdf)

**Conducting Interviews. Tobacco Control Evaluation Center.**

<https://tobaccoeval.ucdavis.edu/sites/g/files/dgvnsk5301/files/inline-files/2018-05-17-TT3-Conducting%20Interviews.pdf>

## In-person and online surveys

**Best Practices in Research & Evaluation: Surveys. Education, Training and Research (ETR). 2013.**

[https://www.etr.org/ebi/assets/File/etr\\_best\\_practices\\_surveys.pdf](https://www.etr.org/ebi/assets/File/etr_best_practices_surveys.pdf)

**Designing Surveys. CDC.**

<https://www.cdc.gov/workplacehealthpromotion/model/employee-level-assessment/designing-surveys.html>

**Increasing Response Rates for Online Surveys. Tobacco Control Evaluation Center.**

[https://tobaccoeval.ucdavis.edu/sites/g/files/dgvnsk5301/files/inline-files/Tips\\_Tools\\_22\\_2012.pdf](https://tobaccoeval.ucdavis.edu/sites/g/files/dgvnsk5301/files/inline-files/Tips_Tools_22_2012.pdf)

**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/>







## Section 11: Consumer Testing Templates

# TEMPLATE I: SAMPLE OPENING FOR FOCUS GROUP OR INTERVIEW

### [For internal use]

- + Title(s) of material(s) being tested:
- + Focus Group / Interview Date:
- + Number of participants:
- + Location:
- + Facilitator/ Interviewer:

### [Sample Script]

#### Facilitator / Interviewer Introduction(s):

Welcome to our consumer testing [focus group / interview]. My name is [name] and I'm from [agency name]. [Add in whatever additional introductory information that you would like to include about yourself or your agency].

#### Why We Are Here:

We are here today to look at [a material / some materials] that our agency has developed. Having community members like yourselves review the materials before they are distributed provides us with valuable information and feedback that we can use to make improvements.

#### Confidentiality and Group Agreements:

Your feedback during this process is valued and essential. None of the people who designed the material(s) are here today, which hopefully will put you at ease for providing honest feedback. Although we will be taking notes today, your responses will be kept private and confidential as we will not be using your names or any identifying information in our notes. 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. We please ask that you respect the opinions of others and remain open during this process.

#### Background Information on Material (Optional):

Before we pass out the material(s) that you will be reviewing, here's some background information on these materials.

#### [Facilitator reads material information out loud.]



## Section 11: Consumer Testing Templates *(continued...)*

### TEMPLATE II: SAMPLE DISCUSSION QUESTIONS

When selecting questions, you will want to choose the questions that work best for your specific material and objectives. Not all of these sample questions will be relevant for all testing situations and questions for your objective may not be listed here. For paper and online surveys, it is best to provide response options (e.g. multiple choice, scale) for as many questions as possible and include only a few questions that require a written response (e.g. short and long answer text boxes).

- 1. For interviews and focus groups, these questions can be used to encourage greater discussion if the facilitator/interviewer feels that more information is needed:**
  - a. Please 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 has more to add to this idea?
  - f. Are there any specific questions or issues regarding this material/image?
  
- 2. Testing content and approach**
  - a. What do you think the main message of the material is?
  - 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, if anything, is missing?

*(Continued...)*

### 3. Testing appropriateness of call to action

- 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?

### 4. Testing images and advertisements

- a. How well do you relate to this image/ad?
- b. What is the overall impact of this image/ad? (Repeat for any individual images that you may be testing within an advertisement)
- 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?

### 5. Testing design

- a. What do you like or dislike about the colors used in this material?
- b. How likely would you be to pick up this material when placed among other materials?
- c. What do you think about the length and/or wordiness of the material?
- d. Please look through the material and comment on the size and type of font used.





## Section 11: Consumer Testing Templates *(continued...)*

### TEMPLATE III: SAMPLE TESTING SUMMARY

Here is a sample testing summary that you can use when reviewing and reporting the participant feedback from your consumer testing.

#### Section 1: Introduction

##### Background

##### Participant Information

- + Participant recruitment
- + Incentives for participation
- + Demographic characteristics of participants
- + Other important information about participants

##### Method(s):

- + Focus groups
  - Number of groups:
  - Number of participants in each group:
- + Interviews
  - Number of interviews/participants:
- + Surveys
  - Number of participants:

##### Date of consumer testing

##### How the method was implemented

*(Continued...)*

## Section 2: Consumer Testing Questions

- + What do you think the main message of the material is?
- + Without looking again at the material, what was the most memorable part about the material?
- + What words were difficult to understand or new to you?
- + What element most grabs your attention?
- + What are some actions you might consider taking after reading the material?
- + Are there parts that are confusing or unclear?
- + What do you like or dislike about the colors used in this material?

## Section 3: Material Strengths

### Highlight the material strengths that participants identified:

- + Did they understand the main message of the material(s)?
- + Did they like the colors and fonts used?
- + Did the imagery resonate with the community?
- + Did they have any feedback on the length and/or wordiness of the material?

## Section 4: Recommendations for Improvement

### Highlight some of the recommendations participants suggested:

- + Did they suggest making the main message clearer to understand?
- + Did they suggest using different colors?
- + Did they suggest changing any of the images used?
- + Did they have any feedback on the length and/or wordiness of the material?

## Section 5: Next Steps

After compiling all the feedback, decide with your team what feedback you want to incorporate into your material edits. Keep in mind that some participants might have different and opposing feedback and you will need to decide which changes to make. After making the edits according to your consumer testing feedback, your material is ready to use!



