Getting it Right: How to Pretest Your Materials with Your Target Audience

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Overview

- Overview of Pretesting
- Critical Components
- When to Pretest/Stages
- Choosing the Target Audiences
- Choosing a Location
- Pretesting with Special Populations
Overview (Cont’d)

- Pretesting Methods
- Readability Testing
- Pretesting Surveys
- Question Development
- Advice from the Field
Social Marketing is a commitment to create products consumers want and need.
Why Pretest?

- Helps determine if materials are on the “right track” before the final product is completed.
- Researcher gauges consumers’ responses to identify ways to improve material.
- Ensures consumers are driving production of the material.
- Saves time and money.
The Key to Effective Pretesting:

Remember the objectives:
Consumers should be able to:

- Clearly communicate what the material is asking them to do
- Clearly understand the "promise"
- Believe that they will receive the "promise" if they take the desired action(s)
Elements of Pretesting
Attractiveness

Includes the general image and appeal, color, illustrations, and the material's ability to catch attention
Comprehension

Involves the recognition of main ideas and the identification of aspects that are confusing
Relevancy

Consists of the participant's ability to identify with the person or images transmitting the message, as well as the message itself; level of interest in the message and its informational value are also measured.
Acceptability

Targets offensive or annoying messages and/or illustrations
Persuasiveness

Identifies whether messages are motivational and whether participants intend to follow the recommended actions
Usefulness

Includes the way the material will be used, anticipated benefits, anticipated problems, and ways to enhance its usefulness
Believability/Credibility

Refers to the participant’s belief that the information presented in the material is credible
When to Pretest
What determines “when” to pretest?

- the materials being created
- budget
- personnel
- time constraints

**Concept and final product stages are often the ones “left out” due to one or more of the above concerns**
Concept Stage

- Tests message and material’s concepts prior to development
- Explores audience members’ feelings, needs, and wants regarding a particular idea
- Uses open-ended questions
- Allows researcher to feel secure initial product ideas are “on track” before spending more time, money, and effort
**Partially Completed Stage**

- Based on what was learned during concept testing
- Tangible preliminary drafts are developed for pretesting with target audience
- Goal is to have a product that can work for the *majority* of the intended audience
- Drawings, storyboards, scripts, and preliminary artwork and copy are used
Testing Alternative Versions

◆ Optional, but generally very beneficial
◆ Helps audience members articulate opinions and suggestions
◆ Makes it easier for people to be honest about their likes and dislikes
◆ Rather than creating different versions, can use similar materials that are already being used or have been used
Testing the Final Product

- Should be done before the materials are put into wide circulation
- If materials have been adapted based on previous findings, there should be no surprising findings at this stage
- Can never guarantee success of your product, but can indicate how a wide range of audience members will view the material
Choosing the Target Audience
Potential Target Audiences

- **Primary audience**
  - who the materials are directly intended for

- **Secondary audience**
  - indirectly influenced by the message or
  - in a position to help advance the message to the primary audience

- **Gatekeepers**
  - in a position to purchase and/or distribute the materials to the primary audience
Descriptions of Target Audiences Should Include:

- demographic information (age, ethnicity, employment status, etc.)
- behavioral characteristics (media habits, shopping behaviors, etc.)
- other psychological characteristics (role models, etc.)
Considerations for Choosing Your Target Audience

- Materials being tested
- Where materials will be distributed
- Goals you have for the materials
What Many Researchers Forget:

Be sure to consult other research that pertains to your target audience before you begin materials development, and especially before you begin pretesting
Choosing a Pretesting Location
Remember...

- Pretesting is not a scientific experiment
- It should not be carried out in a laboratory
- Pretesting is best done in a natural setting, under realistic conditions
- Audience members should feel comfortable with the location
- Best to pretest where audience members will most likely encounter materials
Setting up a site can be frustrating, so...

- Start early, because it may take time for research sites to be confirmed
- Be flexible and diplomatic, as many sites may see pretesting as a disruption
- Start at the top of the hierarchical supervisory structure (saves you time in the long run)
What should you tell sites when contacting them about pretesting?

- You need to talk to respondents one-on-one
- You need a space which is as private as possible
- You will ensure the confidentiality of participants
- How much time you need with each participant
- What you believe to be the best point for intercepting respondents
A Nice Touch:

Follow-up phone conversations with a personal letter which supplies background information about the research and outlines your understanding of how the process will work.
Considerations for Pretesting with Special Populations:

- Low income is NOT synonymous with low literacy
- Timing of the interview
- Competing demands
- Over-examination of the low-income population
- Some methods are inappropriate for pretesting with low literacy populations
Pretesting Methods
Individual Interviews

- Can be conducted by telephone or in person
- Good for sensitive issues
- Appropriate when there are numerous and/or complex issues to be addressed
- Allow for testing of longer, more complex materials
- Allow researcher to probe
- Use with participants with low literacy skills and with hard to reach groups
Individual Telephone Interviews

- All the benefits of individual interviews, plus...
- Useful with members of hard to reach audiences
Disadvantages of Individual Interviews

- Require participants to be/meet at a specified location (except telephone interviews)
- Time consuming
- Can be expensive
Central Location Intercept Interviews

- Interviewers placed in an area which is frequented by members of the target audience
- Closed-ended or multiple choice questions are used
- Low cost
- Can be used to reach large groups and hard to reach audiences
- Not as time consuming
Disadvantages of Central Location Intercept Interviews

- Setting may be disruptive (noise, etc.)
- Allow only for use of closed-ended questions
- Require interviewer time
Program Partner Reviews

◆ Interviews conducted with health professionals and other intermediaries who distribute educational materials
◆ Help ensure materials are distributed in the manner in which they were intended
◆ Researcher should listen for hints suggesting materials won’t be handed out
◆ Not a substitute for pretesting with members of the target audience
Focus Group Interviews

- Group consists of 5-8 participants who share certain characteristics
- Led by a trained moderator
- Allow discussion of key concepts and more personal issues prior to materials development
- Best when used in conjunction with other methods
Disadvantages of Focus Group Interviews

- Can be expensive
- Researcher must watch for "group think"
- Time consuming
Self-Administered Questionnaires

- Distributed to individuals who review the materials and complete the questionnaire on their own
- Only for groups with high literacy skills
- Less time consuming
- Less expensive
- Allow for greater number of participants to be surveyed
Disadvantages of Self-Administered Questionnaires

- Danger of someone other than intended person completing the questionnaire
- May result in low response rate
- Can’t be used with low literacy populations
- Cannot be used with materials which are complex or hard to understand
Theater Testing

- As many as 300 participants are asked to meet at a central location to view the pretest materials.
- Often used with audiovisual materials.
- Allows for rapid analysis of responses from a large group.
Disadvantages of Theater Testing

- Beware of “group think”
- Can be very expensive
- Limited to closed or short answer responses
- Limited to use with partially or fully developed materials
Testing Comprehension

◆ Only the tip of the ice-berg
◆ Also consider:
  ● Font size
  ● White space
  ● Illustrations
◆ Can never truly predict whether members of the target audience will comprehend the material
Methods of Testing Comprehension

- Cloze Test
- Comprehension Restatement
- Signaled Stopping
- Oral Reading Miscue Analysis
- The Circle Test
- Readability Testing (FOG, SMOG)
Select a passage which does not refer to figures, tables, charts, or pictures
Leave first and last sentences intact
Delete every fifth word for a total of about 50 deleted words
Do not delete proper nouns
Replace all deleted words with a blank of equal length
Cloze Test (Cont'd)

◆ Instruct the participant, emphasizing that it is not a test of his/her reading skills
◆ **STOP** if the participant appears confused or reluctant
◆ Count as correct only those words that are the exact replacements of the deleted words (do not count synonyms)
Scoring the Cloze Test

- The raw score is the number of exact word replacements.

- Divide the raw score by the total number of blanks to obtain a percentage:
  - 60% and higher suggests the person is fully capable of understanding the material.
  - 40%-60% suggests the person is in need of supplemental instruction.
  - Below 40% means the material is too difficult.
Comprehension Restatement

- Make a list of key points
- Have participant read the material
- After reading, he/she gives a restatement of its meaning in his/her own words
- Ask questions if a complete restatement is not given
- Take note of the points which are not restated
Signaled Stopping

- While person is reading the material, researcher watches to see when he/she pauses and at every pause asks:
  - agreement and disagreement
  - relating of personal experiences
  - comments about understandability

- Also helpful in determining relevancy, acceptability, and believability/credibility
Oral Reading Miscue Analysis

- Participant reads a portion of the text aloud to the researcher
- Researcher should minimize note-taking

** WARNING: This process can be very intimidating to readers with low literacy skills. Take great caution in using it!
The Circle Test

- Participant reads a passage from the test material
- He/she circles words which are difficult to read and/or understand
- Can be made less personal by asking participant to “guess” words or phrases which others may find difficult to read and/or understand
Tests of Reading Grade Level

- Determine approximate grade-level at which material is written
- Best used in conjunction with other tests of reading comprehension
- Most common methods:
  - FOG
  - SMOG
Interviewing
Opening the Interview

◆ Step 1: Establishing rapport with the participant
◆ Step 2: Providing an orientation to the interview
Step 1: Establish Rapport with the Participant

- Introduce yourself
- Explain your relationship to the project
- Maintain eye contact
- Walk participants to the interview location
- Make friendly small talk
- Be genuine and interested, but not overbearing
Step 2: Provide an Orientation to the Interview

- Explain:
  - the purpose of the interview
  - how the material will be used
  - how the project relates to them or how it can benefit their lives
  - how long the interview will take
  - how the interview will be structured
  - why they were selected
Non-Verbal Language

- also called “body language”
- interviewer should be able to read participant’s body language
- equally important for interviewer to monitor his/her own body language
- can help interviewer determine when to change a line of questioning or probe further
General Guidelines About Body Language

Positive Message
◆ Interest, Participation, Enthusiasm
  • head nods, smiles, eye contact
  • hand shake, gesturing hands, hands in lap
  • stillness, open posture

Negative Message
◆ Defensiveness, Boredom, Embarrassment
  • head down, frown, eyes cast down
  • no hand shake, crossed arms
  • shifting movements, closed posture, leaning back
Keep in Mind:

People have particular body movements that may be natural for them and may not mean anything significant.
Closing the Interview

- Stay within promised time frame
- Assess if major goals have been accomplished
- Review goals aloud with participant as a way of processing information
- Tell participant how helpful he/she has been
- Remind participant of what will happen with results and when material will be finished
Pretesting Surveys
Why Pretest Surveys/Questionnaires?

- Ensure questions meet their goals
- Ensure each question achieves its objective(s)
- Ensure questions and subject matter are appropriate for the target audience
Be Sure to Consider:

- Using a working version which highlights objectives of each question
- Setting aside enough time to collect pretesting data
- Pretesting will not produce the "perfect survey"
How Much is Enough?

- Always conduct two rounds
- Continue until you don't hear anything new
- Pretest with all target audiences
- Other considerations:
  - availability of locations
  - number of available interviewers
  - budget constraints
Divide questionnaire into manageable sections:

- similar objectives and categories
- 5 to 10 questions per section
- each respondent reviews only one section
- pretest sections equally

in final round, combine sections
Question Formation

Always focus on the objectives of pretesting
Attractiveness

◆ Best to allow people to compare alternative versions
◆ Present participants with design options, so they can tell you specific combinations of features they find most pleasing
◆ Participants are not graphic designers, so their likes and dislikes should be reported to the creative team who will actually design the materials
Sample Questions

◆ What do you think about the pictures?
◆ What do you like/dislike about the way the material looks?
◆ What was the first thing that caught your attention?
◆ What could be done to make the material more interesting?
◆ What could be done to make it more attractive?
Comprehension

- Involves asking participants what they think the material is trying to say
- Attempt to focus participants’ attention on the “main idea”
- Helps researcher determine if message is clearly communicated and to pinpoint any confusing messages/illustrations
**Sample Questions**

- What do you think this material is telling you to do?
- What is the main idea it is trying to get across?
- What will you get if you do that? OR
- What does it say will happen if you do that?
- What words/sentences are difficult to read/understand? How can we say that so that it is easier to understand?
Relevancy

◆ Helps researcher determine if participant thinks message is appropriate for people “like them”

◆ If not appropriate for them, participant should identify features that make message more appropriate for someone else
Sample Questions

- Who do you think this material is speaking to?
- What type of people should read/watch this?
- What makes you think the message is made for them?
- What makes you think it is not made for people like you?
- In what ways are the people in the material like/different from you?
Acceptability

Look for subtle problems like:

- humor which is perceived as inappropriate
- illustrations which depict people in a negative light
- aspects of the material which people find offensive
Sample Questions

- Is there anything about the material that you find offensive?
- Is there anything about the material that you find annoying?
- What should be changed to make this material more enjoyable to read/listen to/watch?
Persuasiveness

- Has participant been convinced to do what you want him/her to do
- Relates to individual’s motivation to take the desired action
Sample Questions

◆ What does this material make you want to do?
◆ How likely are you to do that?
◆ What makes you want to take the recommended action? OR
◆ What could convince you to take the recommended action?
Usefulness

◆ Includes:
  • way material will be used
  • anticipated benefits
  • anticipated problems
  • ways to enhance usefulness
Sample Questions

◆ What information did you already know?
◆ What new information did you learn?
◆ Do you think we should spend our money to create this material?
◆ Where do you think the material should be given to people/shown/played?
Believability/Credibility

- Lends insight about the likelihood that they will take the desired action
- If they don’t believe the benefit, they are unlikely to take the desired action
- Also relates to the credibility and appropriateness of the spokesperson
- People must believe the source of the information is dependable/trustworthy
Sample Questions

- Who do you think wrote this material?
- How do you feel about who wrote it?
- How do you feel about the person on the cover/in the pictures?
- What type of people/organizations would be most suitable to write a material like this one?
- What about this material makes you think the offer is not true?
- Who is the best spokesperson for delivering this message?
Advice from the Field
Consent Forms

Written agreement between participant and interviewer that the participant has voluntarily agreed to be part of the research process.

Often not necessary for pretesting.
Demographic Forms

Simple form used to collect basic demographic information from each participant
Demographic Forms May Include:

- race/ethnicity
- age
- number of children
- marital status
- user/non-user
- education level
- language spoken at home
- language of interview
Supply Checklist

When conducting pretesting interviews, don’t forget:

- protocol/interview guide
- materials/questionnaires to be pretested
- pencils
- clipboards
- demographic forms
Ins and Outs of Tape Recording:

- Helpful when interviewing alone
- Allows researcher to focus on asking questions, rather than on taking notes
- Increases time required for analysis
When Pretesting Parents

Always bring activities for children who may accompany them to the pretest site, so parents can focus on the interview, knowing their children are occupied.
When to Use Incentives/Rewards

- Not usually necessary in social service settings where there is a waiting period
- Usually needed in settings where respondents are in a hurry

**NOTE:** when using monetary incentives, it is best to have participants sign a “receipt of cash” form
Types of Incentives

- cash
- children’s books
- baby toys
- coloring books/water color books
- grocery store gift certificates
- toy store gift certificates
- bus passes/tokens
Pretesting with Hispanic Populations:

◆ Often reluctant to criticize materials due to deep concern about researcher’s feelings
◆ Always provide alternative materials for comparison
◆ Researcher should assure participant that he/she is not the material’s creator
◆ Helpful, but not necessary, to use a native speaker
Pretesting with Hispanic Populations (Cont’d)

♦ Spend a lot of time up front making participant feel safe and building rapport
♦ Probe for areas of improvement, rather than criticism of specific features
♦ Expect most comments to be positive
♦ Select clothing/accessories which minimize class differences
Avoid the Common Mistakes of Pretesting

- It’s not necessary to follow the advice of all respondents on all items
- Don’t overlook or place too much emphasis on comments regarding small features of the materials
- Don’t forget that the advertising agency is trained in design, not the participants
Common Mistakes of Pretesting (Cont’d)

- Don’t count participant responses as if they were votes
- Don’t *ignore* or place too much *emphasis* on staff or program partner opinions
- Don’t substitute staff members for audience members
- Don’t pretest in only one area (site)
Take Home Message

- Testing Materials Finds Out if Your Audience:
  - Understands the idea
  - Believes the message
  - Thinks the message relates to them
  - Gets confused by or dislikes some part of it
  - Says they will follow the advice