Pretesting is the process of bringing together members of the priority audience to react to the components of a communication campaign before they are produced in final form. Pre-testing measures the reaction of the selected group of individuals and helps determine whether the priority audience will find the components - usually draft materials understandable, believable and appealing.

Components of a communication campaign that benefit from pretesting include:

- Key benefit and support points
- Messages
- Story boards
- Draft materials
- Name of campaign and logo
- Signature tune/music
- Translated text
- Interpersonal communication activities such as those used by peer educators or field workers

Keep in mind that for social and behavior change communication (SBCC) campaigns and materials to be most effective, they should be tested at several stages of development. In the SBCC process, four types of testing are typically conducted: concept testing, stakeholder reviews, pretesting and field testing. The graphic below demonstrates the relationship between the four types of testing. This guide covers only pretesting.
Why Conduct Pretesting?

**Pretesting** increases the impact of SBCC materials by determining if what has been designed is suitable for the audience. It can save money, time and energy overall as the resulting material will be effective.

**Pretesting** should be conducted to gather information from the audience on the basic aspects or elements of the material, including:

![Diagram](image)

Do not skip the **pretesting** phase. If there are not resources or time to conduct a large-scale pretest, even a small-scale **pretest** can offer useful insights if it is thoughtfully designed.

Who Should Conduct Pretesting?
A small focused team of key program staff (3-4 people) should develop the plans for **pretesting**. For the **pretest** to be most effective, however, it is best to find people *most like the priority audience* - who are trained in pretesting - to lead the actual **pretesting** exercises. Having someone who is like the audience will encourage honesty and openness during the **pretesting** process. Some organizations may consider hiring a research firm to conduct the **pretesting**.

**When Should Pretesting be Conducted?**

**Pretesting** should be completed after concept testing, **message design**, and **materials development**, and before components of the communication campaign are finalized, produced and disseminated.

**Estimated Time Needed**

Completing **pretesting** typically takes between two weeks and two months depending on the testing method, the objectives of the pretest, the number of campaign elements to be tested, and the number of revisions necessary. If materials or messages require a complete rework, it could take longer.

**Learning Objectives**

After completing the activities in the **pretesting** guide, the team will:

- Understand the steps and the stages of testing SBCC materials.
- Define and list the elements of pretesting.
- Know how to choose a pretesting method.
- Know how to conduct a pretest.

**Pre-requisites**

**Steps**

**Step 1: Outline Pretest Objectives**

To guide the pretest process, the team should develop a plan with a clear set of objectives for each component or material being tested. The objectives describe the aims of the pretest and the information to be gathered. Start by reviewing the **creative brief(s)** for the SBCC campaign. The **creative brief**’s description of the priority audience, the promoted behavior and the key promise can be used to inform the **pretest** objectives.

<table>
<thead>
<tr>
<th>Materials:</th>
<th>Posters (two alternative versions)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Priority Audience:</strong></td>
<td>Young mothers (ages 18 - 25) from a rural town; educated at basic school level</td>
</tr>
<tr>
<td><strong>Promoted Behavior:</strong></td>
<td>Spacing pregnancies at least two years</td>
</tr>
</tbody>
</table>

**Objectives:**

- Determine whether the language, writing level and expressions are appropriate and understandable for young mothers with basic school education
- Establish whether the content - including images, font, spokesperson - are appealing and believable to young mothers
- Understand whether the poster motivates young mothers to practice birth spacing
- Determine which poster best meets the pretest objectives

**Step 2: Choose the Pretest Method**
After the pretest objectives are established, select the pretest method. Choosing the right method(s), described in the table below, depends largely on the following:

<table>
<thead>
<tr>
<th>Purpose</th>
<th>What it means: What and how much do we expect to learn from the sample priority audience?</th>
<th>Why it is important: Some methods, such as individual interviews, lend themselves to the collection of more detailed input and individual understanding, while others, such as FGDs, are better for getting broader insights.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of material or campaign element</td>
<td>What it means: Is the material long or short? Is it print, audio-visual, outdoor, or web-based? Is it a theme/concept or a material?</td>
<td>Why it is important: It can be difficult to test long materials using intercept interviews. For some materials, audience interaction is helpful, while for others it is not.</td>
</tr>
<tr>
<td>Characteristics of audience</td>
<td>What it means: What is their level of formal education? What is a culturally appropriate method of accessing the knowledge of the chosen pretest audience?</td>
<td>Why it is important: Some audiences are less comfortable expressing themselves openly in a group. For example, one-on-one methods tend to garner more and better information from low-literate audiences, and it can be difficult to gather peer groups for some audiences (such as leaders). Also, low- and non-literate audiences would need individual assistance to complete written surveys.</td>
</tr>
<tr>
<td>Available resources</td>
<td>What it means: How much time and money is available? What is the expertise of the project team?</td>
<td>Why it is important: Ideally, expert pretesters would pretest until they are getting no new information. In reality, programs must use the best combination of resources available to them and design a pretesting plan accordingly.</td>
</tr>
<tr>
<td>Sensitive or complex nature of the materials</td>
<td>What it means: Will the audience feel more comfortable discussing the topic among their peers or on their own?</td>
<td>Why it is important: In groups, and especially mixed or non-peer groups, individuals might be less likely to speak or to express themselves honestly about sensitive topics or words/concepts they don't understand.</td>
</tr>
<tr>
<td>How the material will be used</td>
<td>What it means: Will the material be used in a group setting or one-on-one?</td>
<td>Why it is important: The context in which the material is used can affect how it is understood or processed. For example, pretesting a group-oriented material with a group can provide insight on how groups will react to it. Such insights might not be obtained in individual pretests.</td>
</tr>
</tbody>
</table>

Review the table below for a list of pretesting methods. Keep in mind that using one method might limit the assessment. The use of mixed methods (e.g. survey questionnaire and in-depth interviews) is one way to capture additional information and fill gaps. Project teams should be able to articulate why they have chosen a certain method or methods for their pretest.

<table>
<thead>
<tr>
<th>Pretest Method</th>
<th>Ideal Sample Size</th>
<th>Appropriate For</th>
<th>Advantages/Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus Group Discussions (FGDs)</td>
<td>Six to ten people for each FGD; need at least four FGDs for each material, if possible.</td>
<td>Program themes, images, general issues, materials in early development.</td>
<td>Advantages: Interaction among participants; potential to cover many topics. Disadvantages: Group reaction could influence individual response; unable to examine sensitive or difficult topics.</td>
</tr>
<tr>
<td>Individual Interviews</td>
<td>At least 10 per type of participant (e.g. 10 husbands/10 wives).</td>
<td>Sensitive topic/content; exchange of confidential information; opportunity to discuss materials more in-depth; low-literacy or hard-to-reach audiences.</td>
<td>Advantages: Responses not influenced by others; has a wide reach, particularly individuals with limited writing or reading skills. Disadvantages: Time consuming; expensive; results cannot be generalized.</td>
</tr>
</tbody>
</table>

Example: A group of 10 women, ages 18-25, discuss their likes/dislikes on posters [or other materials] about the benefits of birth spacing and if their barriers are addressed.
### Step 3: Plan the Pretest

Plan the details of the pretest. This includes identifying the location and meeting site, recruiting participants, identifying facilitators and interviewers, determining incentives, and designing survey questionnaires or focus group discussion guides as needed. Below are some key points to keep in mind during this process:

**Location:** The priority audience should feel comfortable with the pretesting location. For example, it might be best to conduct the pretest in areas or places (e.g. clinics, churches) where the priority audience is most likely to encounter the materials.

**Facilitators/Interviewers/Note-takers:** For focus group discussions and in-depth interviews, make sure to
identify trained or experienced moderators or facilitators. Trained facilitators can be found at universities, research firms, or partner organizations. If possible, use a facilitator who has similar characteristics (e.g. age, background) to the priority audience. This helps to develop trust and comfort among the participants. It is also important to have a trained note-taker who is familiar with the topic and speaks the local language.

**Participants**: Use the creative brief to identify key characteristics of the priority audience. Select a sample of participants that match those characteristics to participate in the pretest. Participants should not have had any involvement in the development of your materials or concept testing. The sample size and collection method will depend on the selected pretest method (see Pretesting Methods Table in Step 2). It is often helpful to over-recruit participants in case some do not show up or complete the pretest. The image below provides some ideas on where to recruit participants. Some organizations have membership lists that can be used for recruitment.

**Cost**: Create a budget to reflect costs for the meeting site, travel/accommodation, equipment rental, facilitator/moderator’s time, copies of draft materials, stakeholder meetings and incentives. Thoughtful budgeting can help ensure all pretesting costs are accounted for.

**Step 4: Develop Pretesting Guide**

Develop a pretesting guide that will serve as a reference for keeping the activity on track (see How to Conduct an Effective Pretest for sample pretest questions). The guide should include the following:

- Background information from the creative brief (e.g. description of SBCC campaign and priority audience)
- Pretest objectives
- Pretest plan (description of pretest method, location, participants, facilitators/moderators/note-takers)
- Pretest questions
- Plan for use of information gathered

**Step 5: Develop Questions**

The goal of pretest questions is to understand the value of the materials. For example, how effective are the posters in influencing young parents to practice birth spacing? A series of open-ended questions will gather specific details about the audience’s preferences. Avoid close-ended (yes or no) questions or those that lead
When developing questions, it is helpful to review the pretesting elements listed in the introduction. This will ensure questions are effective and meaningful (see example in table below). It is also important to include questions that will capture demographic information (e.g. age, education level, marital status, number of children) and details on how participants spend their day (e.g. media use, social gatherings). The program and creative teams should work together to contribute questions about behavior and design.

<table>
<thead>
<tr>
<th>Pretesting Element</th>
<th>Recommendation</th>
<th>Sample Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attractiveness</td>
<td>Allow participants to compare alternative versions of materials.</td>
<td>What do you think about the pictures? What was the first thing that caught your attention?</td>
</tr>
<tr>
<td>Comprehension</td>
<td>Try to focus participants on the main idea of the message.</td>
<td>What do you think this material is telling you to do? What words/sentences are difficult to read/understand?</td>
</tr>
<tr>
<td>Acceptance</td>
<td>Explore issues that could potentially be overlooked.</td>
<td>Is there anything about the material that you find offensive? Is there anything about the material that you find annoying?</td>
</tr>
<tr>
<td>Relevance</td>
<td>Have participants confirm whether the material is appropriate for them.</td>
<td>What type of people should read/watch this? In what ways are people in the material like/different from you?</td>
</tr>
<tr>
<td>Motivation/Persuasion</td>
<td>Explore the effect on behavior and desires.</td>
<td>What does this material make you want to do? How likely are you to do that?</td>
</tr>
<tr>
<td>Improvement</td>
<td>Find out other ways to enhance the material.</td>
<td>What new information did you learn? What do you think is missing?</td>
</tr>
</tbody>
</table>

Salazar, 2008

**Step 6: Conduct Pretest**

**Consent Forms:** It is important to obtain participant consent (verbal or written) prior to the pretest. Consent forms are written agreements that show the individual has volunteered to participate in the activity. It also informs the participant of the risks involved (or clearly states there is no risk).

**Recording and Note-taking:** Some pretests use a self-administered questionnaire. When this is not the case, use a pretest answer sheet to note verbal and nonverbal responses to the material. This promotes consistency among interviewers and pretest sessions. Include on the data sheet the date, time, place, name and type of material, audience, respondent number, element (e.g. image, text, font, audio/video segment, character), pretest questions, and other relevant information as appropriate. Pretests can be recorded to help remind or clarify, but recording should not take the place of note-taking (see Resources Section).

The specifics on how to conduct a pretest will differ based on the method. The pretesting guide in the samples section outlines how to conduct a Focus Group Discussion (FGD) pretest. For details on how to conduct other types of pretests (see Resources Section).

With any type of pretest methods, it is important to use open-ended and probing questions to obtain rich information and avoid unduly influencing respondents.

**Step 7: Analyze Data and Interpret Results**

Analyze the data and interpret the results of the pretest. To analyze:

- Look for trends in responses. If a certain problem or change is mentioned multiple times, it is something that likely needs to be addressed.
• Determine whether results highlight fundamental flaws with the design, messages, or format. If so, the material may need to be completely redesigned. Otherwise, basic revisions should address the problems.
• Consult materials development experts about the suggested changes or problems highlighted. Do not feel compelled to make every change participants suggest.

Step 8: Summarize the Results

Communicate the results of the pretest. Write a report outlining the process and the findings. The report should have the following sections:

• **Background:** What was tested? What were the pretest objectives? Which audience was involved in the process? Why? How? How many participants were involved in the pretest?
• **Highlights:** Summarize the main points that came up during the testing.
• **Findings:** Present a complete report on the findings. Where appropriate, describe the participants’ reactions, incorporate key quotes and describe which creative ideas and concepts worked the best versus those that were not appealing or effective.
• **Conclusions:** Describe the patterns that came up and/or the major differences that were observed across the individuals and/or groups.
• **Recommendations:** Suggest and prioritize revisions for the tested creative ideas, concepts, and/or materials based on the findings and conclusions.

The results should be discussed among those involved with designing the messages, creating the materials and conducting the pretest. This includes program staff, designers, writers, editors, interviewers and note-takers (see Pretest Report Sample under samples).

Step 9: Revise Materials and Retest

If the results of the pretest indicate that major revisions are needed, a complete redesign may be required. Once the materials have been revised, pretest the new version if budget and time allow. The same questionnaire or FGD guide can be used as before with questions added or changed as needed on the particular areas of concern. This is to make sure the problem from the first design is addressed in the newer version.

**Note:**
When retesting the materials, DO NOT use the same group that was used in the first pretest. Choose another group of similar people so they are responding to material new to them.
Resources

Beyond the Brochure: Alternative Approaches to Effective Health Communication

Making Health Communication Programs Work

Testing SBCC Materials
7 Tips for Conducting Intercept Surveys

Readability Formulas

Conducting A Focus Group

Steps for Conducting Focus Groups or Individual In-depth Interviews

Samples

Making Health Communication Programs Work

Methodology for Pretesting Rock Point (RP) 256 Comic Book

Pre-test Discussion Guide for VMMC [Kenya]

Sample Focus Group Discussion and In-Depth Interview Guides

CHCT Materials Pretest Report

Pre-Test Report of Triple S, 'Sexy, Smart and Safe' Health Promotion Campaign

Tips & Recommendations

- **Pretest** some options and alternate concepts if possible, not only one version of a material.
- Even if you are **pretesting** a draft and not a final draft, the draft should be as close to the final version as possible so that those reviewing it can judge it appropriately.
- Be open-minded about the outcome of the **pretest**. If you have already decided what you will find, you will only hear that and miss important insights.
- Don’t use convenience sampling. The group of people most convenient for you to gather may not best represent your priority audience for the material.
- Check with the donor and local government to see whether IRB approval is needed prior to **pretest**.

Lessons Learned

- **Pretesting** is the key to understanding how a priority audience will react and respond to SBCC messages and materials.
- **Pretesting** can save money, time and energy overall as the resultant material will be most suitable for the priority audience and will not run the risk of being inappropriate, misunderstood or rejected.

Glossary & Concepts

- **Concept testing** seeks feedback about general ideas, concepts and creative concepts; typically done before materials are developed.
- **Field testing** allows practitioners to observe whether the SBCC materials are used effectively in their intended settings and contexts, usually through observation and focus group discussions. It determines whether the material meets the intended purpose.
- **FOG Readability Test** measures the readability of writing by estimating how many years of formal education are needed to understand a text. The fog index is **calculated** by selecting a passage of text, determining the average sentence length, counting words with three or more syllables, adding the average sentence length and percentage of complex words, and multiplying by "4".
- **Incentives** are small gifts of appreciation to participants. They might include cash, a snack (e.g. drink, tea, biscuits), phone credit, transport money or hygiene products (e.g. soap, toothbrush).
• **Probing questions** are follow-up questions that reiterate a participant’s comment and clarifies the comment while asking for further information. Some probes can be developed in advance.

• **SMOG Readability Test** is a measure of readability that estimates the years of education needed to understand a piece of writing. It is calculated by reading 30 sentences, counting words with more than 3 syllables, and using a formula.

• **Stakeholders** can include all those involved in or affected by the health or social issue, including public, private and NGO sector agencies, relevant Government Ministries, service delivery groups, audience members, advertising agencies, media and technical experts.

• **Stakeholder reviews** are input from technical experts, partners and decision-makers prior to finalizing materials. These reviews do not replace pretesting with the priority audience and can be done before or after pretesting.

**Sources & Citations**

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• Lozare, Benjamin V. et al. 2011. *Leadership in Strategic Health Communication: Making a Difference in Infectious Disease and Reproductive Health*. Johns Hopkins University Bloomberg School of Public Health, Center for Communication Programs


• Population Services International. The effects of interview method on self-reported sexual behavior and perceptions of community norms in Botswana.