User testing consumer health information

What is user testing?

There are many ways of involving patients in developing information resources, from defining the need for a piece of information, co-authoring resources, providing comments on drafts and evaluating information after it is published. User testing is just one of these.

User testing (also called diagnostic testing, or usability testing) is a specific method of finding out whether a piece of consumer health information is doing its job well, and improving it, before it is finalised. It is a form of ‘performance based testing’ and its use in medicines information was pioneered by Professor David Sless in Australia in the 1990s. Essentially it determines how well – or how badly! – potential users can find and understand important pieces of information in a document.

User testing is the most common method used in the European Union to test the medicine leaflet provided with licensed medicines. This is one way to comply with a legal requirement for ‘consultations with target patient groups to ensure that [the leaflet] is legible, clear and easy to use’. All such leaflets have to demonstrate to the regulators that they meet certain standards when it comes to patients navigating the information and understanding its contents.

But user testing can be very effective for improving all kinds of consumer health information – from booklets and leaflets, to web-based information and videos.

User testing is designed to be an iterative process: it takes time to get right. The document is tested with potential users, and any problems identified. Then those problems need to be cured – by applying good practice in information writing and design. A further test with another group of participants is undertaken to see if the problems really have been solved. This process continues until a satisfactory level of performance is reached.

Note that if you want to test a regulated piece of information, such as a medicine package leaflet, then this guide is not for you, as there are specific requirements for carrying out and reporting these tests: consult a professional!

The three important things to know about user testing

1. **User testing is designed to test the information product towards the end of the development process** – so the time to test is when you have a fully designed version of your information mocked up. It’s important that you have a version available which reflects, for example, final fonts, colours and paper weight or, in the case of a web-based resource, navigation, layout and so on.

2. **User testing is an iterative process.**
   You will be making improvements to your information and test it again to see whether they have ‘worked’ – so you need to test at a stage whereby you can still make changes to your product.

3. **During user testing, you observe people using the information in situations as close as possible to real life.**
   So it’s not just about asking people what they think of the information (although that’s part of it) but about setting them specific challenges to find certain pieces of information, and observing whether and how they succeed in doing this.

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   David Sless is currently Visiting Professor at Coventry University, and CEO of the Communication Research Institute in Australia.
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A step by step guide to user testing

Step 1: Decide who to test the information with
Write a clear protocol at the outset for selecting your test participants, and choose people who represent the target audience for your information.

For example, if the information is about a particular illness or treatment, you may wish to select people with experience of that condition – though you should avoid ‘expert patients’ who know much more than is typical.

You may well want to specify a mix of participants, who could include:

- Particular age groups such as older or younger people – especially if the information is particularly relevant to their age group
- People who have no experience of the subject of the information – such as the disease or treatment involved – as these people are most similar to newly diagnosed patients
- People who do not generally use written documents in their working life
- People who find written information difficult
- People with particular disabilities, especially if the audience for your information is likely to have a disability. For example, information about an eye condition could be tested with people who have eyesight problems.

How many people you are able to test the information with depends on the budget and time you have available. You will need to allow at least half an hour for each user test, and you may need to consider paying your participants’ travel expenses or offering a ‘thank you’ (like a store voucher) to encourage them to take part. Most tests on regulated medicine package leaflets involve a pilot round of up to five interviews, followed by two further rounds of 10 interviews each – so a total of 25 participants test the leaflet. You may not want to do as many as this – but two rounds of five tests each seems a sensible minimum. Testing less than five people, you’re less likely to find all the problems in the document.

Step 2: Develop your test questions
Before carrying out your test, identify the most important information which you would want people to be able to find and act on from your information. Take the top 10-15 issues, and turn these into action-oriented questions, with your expected answers. See the box below for some sample questions. Turn these into a questionnaire which you will use with each test participant.

At the end of the interview, you will want to ask some more open questions to find out what participants thought of the information overall, and how they would improve it.

Example test questions

<table>
<thead>
<tr>
<th>1</th>
<th>Challenge questions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question: What should you do if you have a comment to make about the service?</td>
<td>Correct answer: Contact the PALS service on 020 8956 2564 ...</td>
</tr>
<tr>
<td>Question: What are the top three things which you can do to avoid spreading infection within the hospital?</td>
<td>Correct answer: Wash and dry your hands, use antiseptic hand gel, don’t visit if you are ill.</td>
</tr>
<tr>
<td>Question: Let’s say that one of your friends collapsed, and their mouth was drooping down at one side. What might this be, and what should you do?</td>
<td>Correct answer: That could be a sign of a stroke. You should dial 999 for an ambulance immediately and tell the operator that it is a possible stroke.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2</th>
<th>Open questions for the end of the test:</th>
</tr>
</thead>
<tbody>
<tr>
<td>What did you think of the website overall?</td>
<td>Was there anything that you particularly liked about it?</td>
</tr>
<tr>
<td>Is there anything that you think could be improved?</td>
<td>If there was a booklet like this on a rack, do you think you would actually pick it up and read it?</td>
</tr>
</tbody>
</table>
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**Step 3: Recruit participants**

There are many ways of finding and recruiting participants, such as through:

- Older people’s lunch clubs
- Patient organisations
- Community centres
- Parent and toddler groups

If budget allows, you may wish to consider using a professional market research recruiter or agency to find people to test the information – though the cost can be typically £30 - £50 per person recruited (or even higher with an agency).

Choose a location for your test which people can find easily and where they can sit comfortably – either across a table, or on easy chairs with you. Offer refreshments if budget allows, and explain how expenses may be claimed. You may want to consider carrying out your test alongside a meeting which is already taking place, to make it easier for participants to attend. If you are testing a web-based resource, you will need a computer with an internet connection for the participants to use during the test.

**Step 4: Run the test**

At the start of each test interview, you will want to:

- Show people in to the room and put them at their ease
- Explain what the test will involve and how long it will take
- Let participants know that their participation is voluntary and that all information they give will be treated anonymously and confidentially
- Reassure participants that it is the information that is being tested, not them

Some user testers allow participants some time before the interview (perhaps 10-15 minutes) to look at the information and familiarise themselves with it. However, the drawback of this approach is that you lose the opportunity to observe participants using the information for the first time – which can give very valuable pointers based on how they react to it, how they try to search and navigate through it.

A better approach may be to give participants just a couple of minutes at the start of the interview to look through the information and see how it works, but then to watch them using it in real time – allowing them as much time as they need (within reason) after you ask each question to find the answers.

As you ask each question, observe and write down both what participants do (how they search through the document or website) as well as what they say.

Receive participants’ feedback gladly and don’t defend your information! At the end, thank them for their participation. At a later date, feedback how the prototype has changed based on their input e.g. provide participants with a copy of the final version.

**Step 5: Decide on your recommendations and implement them**

After the round of interviews, you will want to consider carefully how you might want to change your information: to respond to user feedback, and to solve issues that you have identified about the ease of use of your information. Once you have decided on changes to try, implement them and create a new prototype.

**Step 6: Test again**

It’s important to re-test your information after making changes, to find out whether they have worked (and to check that you haven’t added any new problems in the process). At the end of the process, you should feel confident that users really can use your document.

**Getting help from professionals**

By following these steps, you should find that you are able to improve your information resource significantly and make it fit for purpose. If you need more help with testing – for example if you need the results of the test for a regulatory reason, or if you are producing an information resource which will reach a huge audience and need to be extremely sure of getting it right first time – then you may want to contact a professional user testing company who can independently test your information resource.

Two user testing companies with long experience who are members of PIF are:

- Luto – www.luto.co.uk
- Consumation Ltd – www.consumation.com