

**Case article** Piloting.... flying the plane, or parking the boat?

**Date** March 2010

**Published By** Dr. Sandy Ochojna

*Dr Sandy Ochojna is an independent survey research advisor. Between 1986 and 2008 he was the Manchester-based director of several well-known international market research companies; for the ten years prior to that he was Passenger Manager at Strathclyde Passenger Transport Executive in Glasgow. From time to time he feels compelled to set down his thoughts on topical survey issues.*

---

I sometimes wonder why some clients place so much emphasis on piloting their questionnaires. We may have gone through numerous drafts , the 'final' may have gone all the way up the client's sometimes very slow and tortuous decision-making process, and then just as fieldwork is about to get under way, then they ask "What about piloting the questionnaire?". If the job is being undertaken under strict time and/or budgetary pressures, a common response is that a pilot is not necessary because the client has the local and issue knowledge while the agency has the fieldwork and design expertise.....so really, what can go wrong? Nine times out of ten this is a fair assessment and a realistic stance, but maybe that is because the client has asked the wrong question.

### **Setting out the course**

For any survey to be a success its development must address the five basic aspects of survey design, namely

- Survey objective     why do we ask?
- Survey universe     who do we ask?
- Sample size         how many to we ask?
- Questionnaire      what do we ask?
- Fieldwork method   how do we ask it?

Get any one of these wrong or confused, and the survey fails. So why just think about testing the questionnaire? Surely if there is testing to be done, it should be about the hypothesis – the why? – which knowingly or otherwise underpins the whole survey (see my case notes on Quotas). In other words, if we must pilot then we should be piloting the whole survey, not just its questions.

## **A proper pilot**

A proper pilot, one which can justify its cost in terms of time and money, is one which can answer such questions as;

The why; are we asking questions about things that respondents understand, care about, and can express meaningful opinions on?

The who; are we asking the right people, and are we asking enough of them to allow meaningful sub-group analysis?

The what; are the questions relevant to the respondent, are they clear and unambiguous, that is, are they simple, and is the questionnaire leading in any way?

The how? is the fieldwork method as effective as we thought, and is it biasing the results in any way?

And, there is still more that a pilot should do! It should seek to test the hypothesis. That is, its data should be coded and its results analysed. A pilot analysis is probably the most useful pre-survey testing that can ever be done.

## **Pre-departure safety checks**

Happily, by far the best way to check out the mechanics of a questionnaire, to see if all the routings are correct and the code frames are complete, is to do the tab. spec. Hence the best time to do the tab. spec. is before the survey goes into the field; and this is hard. Having spent maybe weeks in tedious and picky negotiations on questionnaire content, and managed to achieve a signed-off consensus, the last thing a researcher wants is to rush back headlong into the minutiae of the tab. spec..... but that is the only way to really test the questionnaire to destruction: and if you find an error while the survey is in the field, then you have a problem.

So, if you have the tab. spec. why not just push on through and analyse whatever the pilot exercise brings in? Clearly in this respect CATI and on-line are the ideal fieldwork methods, but clients should think long and hard about adopting (and paying for) such an approach when using more expensive in-home fieldwork or expansive postal surveys.

Such an analysis is invaluable in

- assessing the validity of the original hypothesis and exploring others which may reveal themselves in the data
- deciding whether the initial quota controls or target sub-groups are indeed the best ones, or the only ones, for the job.

This then allows the questionnaire to be revisited **purposefully**, perhaps particularly with reference to key questions, respondent descriptors, and the subsequent follow-on of quota controls.

### **So...**

A ship's pilot takes you out of port and into port while an airline pilot takes you all the way. In the same vein, you can pilot just a bit of the survey – the questionnaire - or you can pilot it all. And don't simply dismiss the latter option because it will cost: sometimes not doing it can cost even more! In many instances the questionnaire will be fine and the survey design will be acceptable, in which case the main effect on the project will relate to timescale....so prepare to be a bit more accommodating and realistic on that score.

Just remember what all airline pilots say: such actions allow everyone, and especially the client, to "sit back, relax and enjoy" once, or even before, fieldwork has started.

Dr Sandy Ochojna

[www.thesurveydoctor.co.uk](http://www.thesurveydoctor.co.uk)

March 2010