

Pilot Survey ^[1]

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One of the key elements in conducting surveys and other data gathering methods is efficiency. It is important to utilize money, time and effort in the most efficient way possible to achieve success in performing surveys, especially those that require a large number of participants. To promote efficiency in conducting surveys, researchers usually perform a pilot survey.

What is a Pilot Survey?

A pilot survey is a strategy used to test the questionnaire using a smaller sample compared to the planned sample size ^[3]. In this phase of conducting a survey, the questionnaire is administered to a percentage of the total sample population ^[4], or in more informal cases just to a convenience sample ^[5].

Advantages of a Pilot Survey

Conducting a pilot survey ^[6] prior to the actual, large-scale survey presents many benefits and advantages for the researcher. One of these is the exploration of the particular issues that may potentially have an antagonistic impact on the survey results. These issues include the appropriateness of questions to the target population ^[7].

A pilot survey also tests the correctness of the instructions to be measured by whether all the respondents in the pilot sample are able to follow the directions as indicated. It also provides better information on whether the type of survey is effective in fulfilling the purpose of the study ^[8]. Practically speaking, pilot surveys save financial resources because if errors are found in the questionnaire or interview early on, there would be a lesser chance of unreliable ^[9] results or worse, that you would need to start over again after conducting the survey.

All in all, the main objective of a pilot study is to determine whether conducting a large-scale survey is worth the effort.

Read also: The Pilot Study ^[10].

Types of Pilot Survey

A. According to Organization

There are two types of pilot survey according to organization – external and internal. An external pilot survey intends to administer the questionnaire to a small group of target participants who will not be included in the main survey. On the other hand, an internal pilot survey will consider the respondents in the pilot as the first participants in the main survey.

B. According to Respondent Participation

There are two types of pilot survey according to the participation of the respondents – undeclared and participatory. In an undeclared pilot survey, you administer the survey to a certain number of respondents as if it is the real and full scale survey, not a pretest one. On the other hand, participatory pilot surveys involve informing the respondents that they are in the pre-test phase. The respondents are to be asked what they can say about the questionnaire, specifically their reactions, comments and suggestions. For instance, you may ask them about how clear the instructions are or which questions are hard to answer. Converse and Presser (1986) recommend using the participatory pilot survey first, and then conducting the undeclared pilot.

The Results of a Pilot Survey

After obtaining and analyzing the results of the pilot survey, logistical, technical and other issues or problems can be addressed. The questionnaire or interview format can be revised, or the type of survey may be altered into a more suitable one. After the revision of the survey, the researcher may opt to conduct a second pilot survey to determine whether the errors and issues are effectively solved. If the problems were minor, then the large-scale survey can be executed.

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- [2] <https://staging.explorables.com/users/sarah>
- [3] <https://staging.explorables.com/sample-size>
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