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Key considerations for testing and piloting surveys

Testing and piloting survey questionnaires are crucial steps to ensure the effectiveness and accuracy of data collection for UNHCR and partners. Survey questionnaires should be tested and piloted regardless of the data collection method used (such as key informant interview, household/ individual survey, or focus group discussions). This guidance provides key considerations on piloting and testing different survey questionnaire, with a focus on household/ individual survey questionnaires, although these considerations are also be applicable to questionnaires using other data collection methods.

Once a survey questionnaire has been finalised and transferred to KoboToolbox, it is crucial to test it before collecting the data for the whole survey. Testing and piloting can help you to identify;

- Questions that don't make sense to respondents

- Problems with the questionnaire that might lead to biased answers

- Technical issues such as errors in skip-pattern logic, data collection devices or server errors.

Piloting is particularly important when your questionnaire is complex, contentious, sensitive, or lengthy.

1.Any testing is better than no testing

People often assume that testing a survey takes a long time. They think they don't have the time or resources for it, and so they end up running the survey without any testing. This is a big mistake. Even testing with one person is better than no testing at all. So, if you don't have the time or resources to do everything to test and pilot your survey just do as much as you can with what you have available.

2.Adapt to survey size and data collection methods

Tailor the testing plan based on the size and budget of the survey and the survey methods used. Although all survey questionnaires should be piloted and tested, the time and resources dedicated to those activities will not be the same if the survey questionnaire has 30 questions and a sample of 3,000 respondents than if the survey questionnaire has 10 questions and a sample of 300 interviews without a representative sample or is a survey questionnaire for a small series of focus group discussions.

3.Add questions to identify areas for improvement

Use the piloting as an opportunity to evaluate the questionnaire mistakes and capture respondents' opinions on the questions. Include questions at the end of the questionnaire to identify areas for improvement. These can be answered by the enumerators or by the respondents depending on the methodology.

Here are some examples:

- How long did it take you to complete the survey?
- Were there any terms or words you did not know or though were misused? Which?
- Were there some questions on the survey difficult to answer? Which? Why?
- Did any of the questions make you feel uncomfortable? Which? Why?
- Were there any questions that you were not able to answer accurately? Which? Why?

4.Test, then pilot, using three levels

Where possible, surveys should be tested at three levels:

1. **Test with members of the project team**, who are familiar with the aims and objectives of the survey. In addition to testing the survey's feasibility, appropriateness and length, testers from the project team should be able to give you a good idea of whether your survey questions are likely to give you the information you need.

2. **Test with colleagues not immediately involved in the project**. Members of the project team are likely to be more familiar with the concepts your survey covers than your target audience, especially if they have helped contribute to the survey design. Colleagues who are unfamiliar with the survey before testing it are likely to have a more similar experience to your 'real' target audience.

3. **Pilot with a small selection of the target audience**. While this is the most time-consuming and costly step, it is also the most useful, as it provides you with the real picture of how your survey will work in the field, and any issues you may have with data accuracy.

5.Make improvements based on the results

Each time you test the questionnaire in one of the levels, identify issues and improve the questionnaire in a new version. Do not re-test the same version of a survey. Take notes of all the changes made on the survey questionnaire and the reason for these changes so you can come back at any time to these notes and understand the changes done.

6.If needed consider to re-test and re-pilot your survey questionnaire

Normally the three-step test and pilot of your survey questionnaire will allow you to identify the main issues and address them along the process. If at the end of the pilot, you realize that mayor changes are needed to the questions or the questionnaire structure, it may be necessary to repeat the test and pilot exercise before starting the survey, especially if the survey still includes complex questions which you consider may not be clear to respondents.

7.Be thoughtful about what changes to make

You don't need to include every piloting insight. Sometimes, you will get bad feedback if an enumerator misunderstands something, was not well-trained on the questionnaire, or the sample respondents were not chosen correctly. It is important to remain critical and make sure you are only incorporating the right feedback, something that will drastically improve the survey for everyone (rather than just one or two surveyors) and will not make the survey more difficult. A good practice is to make sure that a significant number of people agree to the survey changes.

8. Include the data analysis plan in your pilot

The questionnaire should directly feed the data analysis plan. Therefore, test and pilot the data analysis plan using the data collected from the testing and piloting to ensure that the data collected can be analyzed as it is described in the plan.

If analytical problems are identified, consider whether it is an error in the analysis or an error in how the data was collected (or both). This part is crucial to the successful use of the data, as it does not matter how good the survey questionnaire and how good the data collected is, if the data cannot be analyzed to achieve the objectives of the survey.

9. Pilot all aspects of the survey

Test and pilot the question flow, the order of the questions, question types, and even the help text to ensure that the survey is clear to both the enumerator and respondents. To pilot question flow and order, you should observe how comfortable enumerators and respondents are as go through the survey. Check whether the respondents get confused or give the same information twice. If this happens, it might be helpful to change the order of the questions or add help text.

You may be planning to deliver your survey using a range of different platforms, devices, web browsers or operating systems. If this is the case, it is important to test your survey on as many of these as possible before you distribute the survey. If the survey platform is not optimised for mobile devices, for example, questions might not display properly, or may appear in a confusing way.

Key reference documents

- [How to pretest and pilot a survey questionnaire,](#) "Practical tools for international development"
- [11 things that everyone should know about piloting a survey,](#) "Human of data"
- [Testing and piloting a survey,](#) "Mastek Blog"