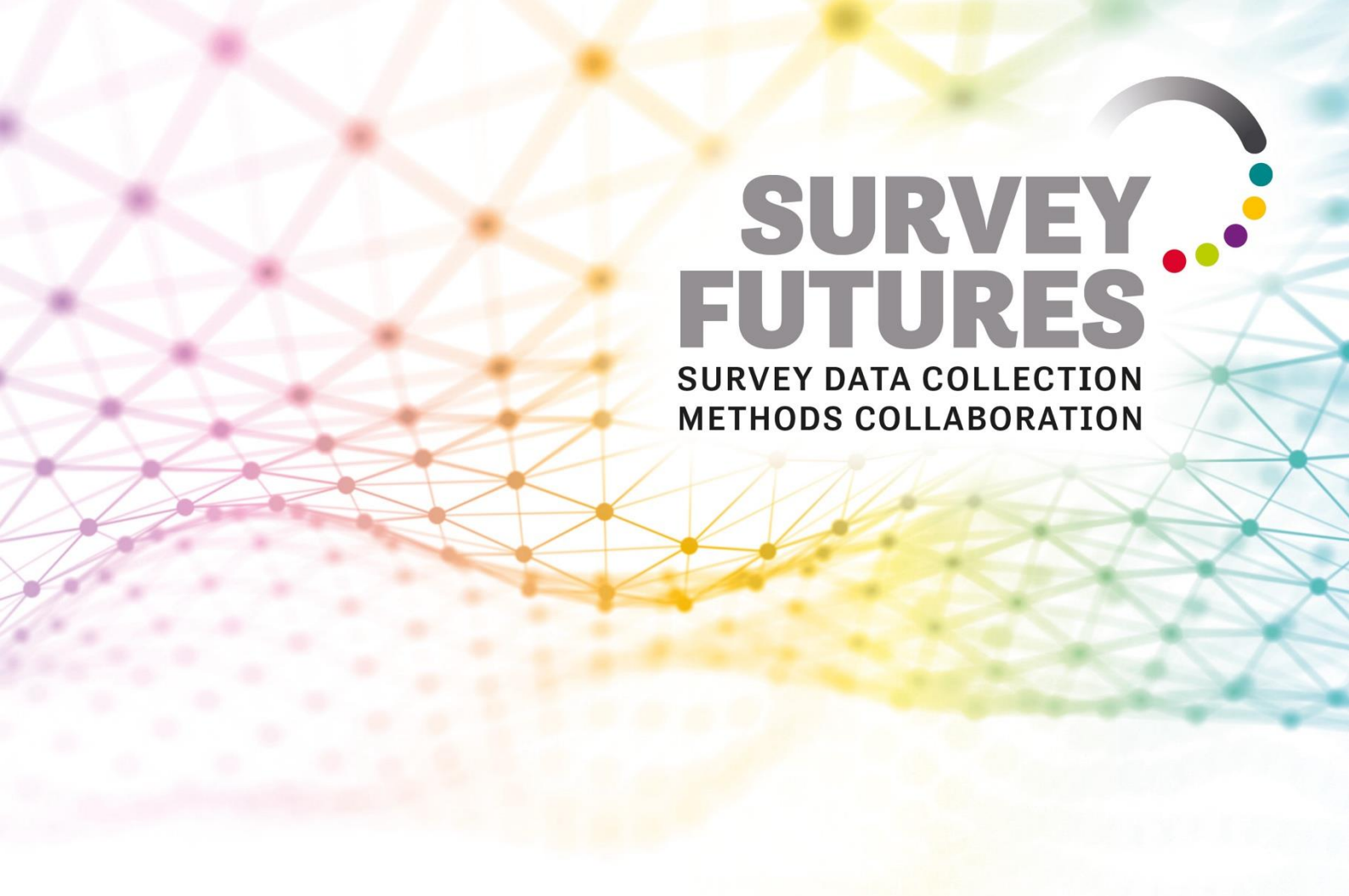




SURVEY FUTURES

**SURVEY DATA COLLECTION
METHODS COLLABORATION**

Report 6: The post-pandemic role of face-to-face interviewers

Second report

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Executive Summary

This report provides an analysis of the evolving role of face-to-face survey interviewers in the context of changes brought about by the COVID-19 pandemic. The work forms part of the Economic and Social Research Council (ESRC)-funded Survey Futures initiative. The primary focus of this report is to understand the capacity and skills needs of face-to-face survey interviewers, a crucial aspect of social survey research that has faced significant challenges, particularly exacerbated by the COVID-19 pandemic. This is an update to the report by Charman et al, 2024, incorporating the findings from additional research with survey interviewers.

Research Methodology

The research was conducted in two phases. Phase one, carried out in late 2023-early 2024, involved 11 semi-structured interviews with Field Operations Leads, individuals responsible for the management of face-to-face survey interviewers representing 11 social and market research organisations based in the UK. Following the interviews, a roundtable discussion was held to validate the findings and gather further insights.

Phase two, carried out in June 2024, consisted of focus groups with face-to-face survey interviewers who were employed by a subset of the 11 organisations that participated in phase one. Twenty-seven interviewers each attended one of four online focus groups, divided by experience level to capture perspectives both pre- and post-pandemic. Findings from the first phase were shared with interviewers and interviewers were invited to comment on them, adding their experiences and challenges.

Findings

Pre-pandemic face-to-face survey landscape

Prior to the COVID-19 pandemic, face-to-face survey interviewing was a well-established method, that historically was favoured for its high response rates, and data quality. The role of the field interviewer was primarily focused on contacting sample members, gaining co-operation and conducting in-person interviewing. The workforce was characterised by experienced interviewers, many of whom were retired or nearing retirement, and were motivated by the social value of the work and the opportunity to engage with the public.

Field interviewers were typically employed on a casual basis, with remuneration models including day rates or piecework. The work required basic IT skills, knowledge of survey protocols, and strong interpersonal abilities such as communication, persuasion, and resilience.

Impact of Covid-19

The COVID-19 pandemic had a profound impact on face-to-face survey interviewing. National and regional lockdowns led to a pause in in-person fieldwork. There was a widespread loss of experienced field interviewers during this period, who are proving difficult to replace. While face-to-face interviews have resumed, the volume of such work has declined in social survey research. Field Operational Leads linked this decline to the greater adoption of mixed mode surveys post-pandemic, where face-to-face interviews are reserved for non-responders to web or telephone invitations. These non-responders can be particularly difficult to persuade to take part.

Field Operations Leads noted a decline in social survey response rates, which they believed was due to various factors, including a general unwillingness among the public to interact with strangers, distrust in government, GDPR-related concerns, and the blurring of work and non-work time due to hybrid working patterns.

Emerging role of the face-to-face interviewer post-pandemic

The role of the social survey face-to-face interviewer is evolving. Interviewers are now required to engage demographic groups that are less likely than average to participate in web or telephone surveys and persuade them to participate. Field Operations Leads reported that this shift demands interviewers to have higher levels of motivation, tenacity, resilience, and persuasiveness than pre-pandemic. This report contains a revised face-to-face survey interviewer job description based on what the Field Operational Leads told us about how the role has changed.

Some organisations were piloting multiskilled interviewers capable of conducting interviews across different modes, reflecting a strategic response to workforce challenges and the need to drive more value from a smaller pool of interviewers. There was also a growing emphasis on supporting interviewers in their roles, with enhanced supervisory responsibilities to manage performance, provide coaching, and boost resilience.

Experiences and Views of Survey Interviewers

The experiences and views of survey interviewers who participated in the research provide valuable insights into the evolving landscape of face-to-face survey work. Interviewers with more than four years of experience highlighted the satisfaction they derive from the social value of their work and their interactions with the public. They expressed pride in their interviewing skills and the contribution they make to society.

However, interviewers also reported challenges, particularly in the context of the pandemic. They noted that the shift towards mixed mode surveys and the increased focus on engaging with population subgroups who are less likely than average to take part in web and telephone surveys have made their roles more demanding. Interviewers

described the difficulties in persuading people to participate in surveys, with some feeling that back-office staff, including researchers, could be doing more to help interviewers gain the co-operation of the public, e.g. by making surveys shorter and more engaging.

Interviewers also highlighted the need for better support and resources. They expressed concerns about the slow and cumbersome technology they use, which can hinder their work. Additionally, newer interviewers emphasised the importance of support and mentorship, noting that greater support could help build their skills and resilience.

Interviewers' views on pay and reward systems were mixed. Newer interviewers perceived an unfairness in the current piece rate model that penalised their lack of experience in gaining sample members' co-operation to take part. This may explain why newer interviewers tended to favour the day-rate model, with more experienced interviewers tending to favour the pay-for-performance model. One suggestion put forward by interviewers with more than four years' experience was that higher pay rates should be offered for more complex work and/or to those interviewers with longer experience.

Overall, interviewers expressed a desire for greater connection with their organisations. They believed that improved communication and opportunities to provide feedback on survey designs could enhance their job satisfaction and make surveys more appealing to the public. They also suggested that raising public awareness of the role of survey interviewers and the importance of survey research could help improve response rates and support recruitment and retention efforts.

Recommendations and Conclusions

The research identified several key recommendations to address the challenges faced by face-to-face survey interviewers:

1. **Recruitment and Retention:** Organisations should consider (further) targeted recruitment strategies, such as focusing on pre-retirement groups and students, to expand the pool of potential interviewers. Emphasising the social value and unique characteristics of the role may attract more candidates. Additionally, improving the support and supervision of interviewers can help retain talent and build resilience.
2. **Pay Models:** The traditional piecework model is being challenged by the changing nature of the work and declining response rates. Some organisations were trialling the employment of a core group of permanent or fixed term contracted interviewers alongside a more casual labour pool and further experimentation with pay models could be beneficial. Higher pay rates for more

complex work and payment for a wider range of interviewer tasks rather than just achieving an interview could also be explored.

3. **Role Definition and Support:** The face-to-face interviewer role is becoming more complex, requiring multiskilled individuals capable of engaging with diverse groups and using a range of digital technologies. Organisations should clearly define different levels of interviewer work, linked to pay and development pathways, and reinforce supervisory roles to focus on people management and performance support. Further targeted interviewer training to develop necessary skills and behaviours may also be required.
4. **Public Awareness:** Raising public awareness of the importance of survey research and the role of survey interviewers may help build trust and improve response rates. How this might be achieved requires further thought, however. Additionally, organisations should consider how they can best involve interviewers in the survey design process to help with making surveys more appealing to the public. Survey interviewers want researchers, back-office staff and research commissioners to better understand the challenges they face and to help them engage the public in surveys and make participation more attractive.
5. **Collaboration and Innovation:** Exploring collaboration with local enterprise partnerships, whose knowledge of local labour markets could help to address recruitment challenges.

Additionally, innovative approaches such as digital marketplaces for interviewer labour could reduce hiring costs and improve the consistency of work for interviewers.

These recommendations should be considered further, particularly whether there is scope and impetus for more co-ordinated action across organisations.

In conclusion, the changing landscape of face-to-face survey interviewing presents both challenges and opportunities. Organisations must adapt to the evolving role of interviewers, enhance recruitment and retention strategies, and explore innovative approaches to support their workforce. By doing so, they can ensure the continued high quality of social survey research in the UK. The views and experiences of survey interviewers underscore the importance of support, fair remuneration, and public awareness in maintaining a robust and effective survey workforce.

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1. Introduction

1.1 Survey Futures

Survey Futures is an Economic and Social Research Council (ESRC)-funded initiative (grant ES/X014150/1) aimed at bringing about a step change in survey research to ensure that high quality social survey research can continue in the UK. The initiative brings together social survey researchers, methodologists, commissioners and other stakeholders from across academia, government, private and not-for-profit sectors. Activities include an extensive programme of research, a training and capacity-building (TCB) stream, and dissemination and promotion of good practice. The research programme aims to assess the quality implications of the most important design choices relevant to future UK surveys, with a focus on inclusivity and representativeness, while the TCB stream aims to provide understanding of capacity and skills needs in the survey sector (both interviewers and research professionals), to identify promising ways to improve both, and to take steps towards making those improvements. Survey Futures is directed by Professor Peter Lynn, University of Essex, and is a collaboration of twelve organisations, benefiting from additional support from the Office for National Statistics and the ESRC National Centre for Research Methods. Further information can be found at www.surveyfutures.net. This report is concerned with understanding of capacity and skills needs of face-to-face survey interviewers.

1.2 Background

Survey data collection involving face-to-face interviewing, also referred to as in-person interviewing, has a long history dating back to the late 1800s (O’Muircheartaigh, 1997). This method has been favoured by random probability surveys that require high levels of coverage of the target population, high response rates and high data quality (Groves et al, 2009), and by non-random probability surveys that seek qualitative judgements on products, services, media messaging and customer experience. More recently, the conduct of face-to-face surveys, particularly random probability surveys, has become more challenging. For example, the UK Market Research Society (MRS) in partnership with four UK survey organisations (GfK, Ipsos, Kantar Public (now known as Verian) and the National Centre for Social Research - NatCen) noted ‘delivery challenges primarily driven by falling [survey] participation rates and a shortage of skilled interviewers’ (May, Ainsby, McLaughlin, 2017; p1). The Economic and Social Research Council (ESRC)-funded Survey Data Collection Network (SDC-net) remarked that these delivery challenges were felt to have been exacerbated by the COVID-19 pandemic. It recommended further research to explore how the role of face-to-face survey interviewers is changing (Maslovskaya et al, 2022). The research reported here is a response to that call.

1.3 Research aims and objectives

This research aims to address three challenges identified by the SDC-net meeting on the changing role of face-to-face social survey interviewers in the UK:

- Improve understanding of the ways in which the role of the face-to-face fieldworker is changing in response to societal, commercial, technological, and methodological trends.
- Identify the key skills and attributes needed by the face-to-face fieldworker today and how this is likely to change in the future.
- Identify the implications for sourcing and retaining skilled face-to-face fieldworkers.

This research is led by NatCen working in collaboration with Mervelles Limited, a HR consultancy. This updated report presents findings from discussions with people responsible for the management of survey fieldworkers and with fieldworkers themselves. The rest of this chapter describes the research methodology. Chapter 2 considers the role of the face-to-face survey interviewer before the COVID-19 pandemic, describing recruitment challenges and defining the role. Chapter 3 discusses the impact of the COVID-19 pandemic on in-person surveys, challenges in recruiting and retaining survey fieldworkers, and the recruitment strategies being trialled. Chapter 4 looks at how the survey fieldworker role is changing, and the implications of this role change for recruitment and retention for interviewers. Chapter 5 concludes by considering the potential implications of the changing nature of the survey interviewer role for organisations and the sector, proposing some potential ways forward.

1.4 Research Methodology

This research involved two phases. **Phase one** involved semi-structured interviews with people with overall responsibility for face-to-face survey interviewers, who were identified through NatCen's existing contacts and networks, and the Register of MRS Field Companies. Throughout this report, these participants are referred to as Field Operations Leads. Named individuals were first contacted by NatCen and invited to take part. The contact details of those who agreed were passed to Mervelles, who contacted them to arrange a convenient time for a one-to-one interview via videoconference. The initial invitation also mentioned that participants would be invited to a roundtable discussion of the research findings, that participation was voluntary, and that participants could withdraw their consent at any time. The research design was peer reviewed by NatCen's Research Ethics Committee prior to fieldwork starting.

Interviews involved Field Operational Leads reflecting on the role of the face-to-face survey interviewer before the COVID-19 pandemic, changes to the role post- pandemic, whether they expect these changes to be sustained, and what skills they think interviewers may need in the future. Views were also sought on the future role of face-to-face interviewers and on perceived implications for sourcing, employing, developing and rewarding face-to-face interviewers. A copy of the interview guide developed by Mervelles Limited with input from NatCen can be found in Appendix A. Interviews with 11 Field Operational Leads from 11 social and market research organisations with face-to-face interviewer panels were undertaken between September and November 2023. These individuals were subsequently invited to an online round table event, at which Mervelles shared findings generated from the interviews, to check the accuracy of the findings and that they resonated with their experiences. This approach is known as

member checking (Birt et al, 2016). The roundtable also sought participants' views on proposed responses to the challenges identified. The round table event took place in January 2024.

All participating organisations agreed to be named in this report and were:

- BEAM Fieldwork
- Beaufort Research
- BMG Research
- DJS Research
- Ipsos
- National Centre for Social Research
- Northern Ireland Statistics and Research Agency
- Office for National Statistics
- Qa Research
- Verian (formerly Kantar Public)
- Walnut Unlimited

Phase two involved focus groups with face-to-face survey interviewers. A total of 27 interviewers attended one of four online focus groups held in June 2024. A copy of the topic guide for the focus groups can be found in Appendix B. Two focus groups were conducted with interviewers with four or more years' experience, and two with interviewers with less than four years' experience. Defining length of experience in this way enabled us to speak with interviewers about their experience of the role, pre-pandemic (those with four or more years' experience) and with those who had only experienced the role post-pandemic (those with less than 4 years' experience).

All the organisations that took part in phase one were asked to participate in phase two. Those that agreed were asked to share an invitation with their face-to-face interviewers. It invited them to express interest in taking part in the research by emailing the research team at NatCen. Those who expressed interest were asked to complete a short questionnaire that collected information about years of interviewing experience; the region of the UK they worked in; whether they tended to work in more urban or rural areas; and the research agency they worked for. Using this information, the NatCen research team selected as diverse a range of interviewers as possible to invite to take part in one of the four focus groups. Focus groups took place online, via videoconference, and lasted 90 minutes. The groups were facilitated by Mervelles and recorded for notetaking purposes. Interviewers received a £30 shopping voucher as a thank you for taking part. Among the participating interviewers, virtually all worked primarily for social rather than market research companies. They tended to work for one organisation rather than picking up assignments from across a range of organisations.

Field interviewing work was seen as a supplementary source of income by the majority of interviewers involved in this research. This reflected the fact that they were people who had come to survey interviewing later in life, having had careers in other professions and had other sources of income. Up-to-date data on the demographic characteristics of face-to-face survey interviewers in the UK is not publicly available

and as such it is not possible to assess how reflective of the wider face-to-face interviewer pool those who took part in these workshops are.

We are grateful to all those who took part in this research.

2. The role of the field survey interviewer pre-pandemic

2.1 Pre-pandemic surveys and field interviewers

Prior to the COVID-19 pandemic, mixed mode survey designs had been steadily growing in popularity when in-person interaction was not deemed essential. Where in-person (place-based) interaction was essential – for example, visitor and tourist experience surveys, product testing, hall tests, exit interviews, or where it was deemed necessary for measurement quality purposes. – face-to-face fieldwork has remained relatively unchanged for some time.

The role of the fieldworker tended to be solely focused on face-to-face interviewing. There were few examples of workers performing tasks outside of this, and separate teams existed for other methods e.g., telephone-based research. Field Operational Leads felt that survey protocols had become more complex over time, involving the collection of a wider range of data (e.g. collection of biological samples, measuring cognitive function, consent to consent to data linkage) in addition to the administration of the survey questionnaire. They also noted the increasing use of digital technologies in surveys (e.g., laptops and tablets for data recording) for both interviewing and interacting with head office systems (e.g. to submit pay claims, receive and submit work assignments).

Figures on the demographic characteristics of the UK's survey interviewers are not publicly available. However, ONS figures on the characteristics of its social survey interviewers, show the majority were male - 64% in 2015, falling to 60% in 2021 (ONS, 2021). The pre-pandemic workforce was characterised by a core group of long-standing, experienced interviewers. In 2016 almost a quarter (24%) of face-to-face interviewers had 10 or more years' experience according to data collated across Ipsos MORI, Kantar Public, GfK and NatCen's field forces (Ainsby et al, 2017) Ainsby et al (2017) also reported high levels of churn among interviews, with annual turnover rates varying between 32% in 2012 and 53% in 2016,

Field Operational Leads described their pre-pandemic F2F interviewer panels as consisting of many people who were retired or 'pre-retirement'. They reported that these individuals were motivated to work as survey interviewers by a desire to engage in interesting work, maintain connections with the world of work, and earn additional income. This characterisation of the survey interviewer was corroborated by the interviewers who took part in this research. Interviewers stated they were drawn to the work because it was perceived to be of social value, which was important for them, and because they wanted a job that involved interacting with members of the public, as the following quotes illustrate.

"I find it a huge privilege just hearing the stories that people tell"

[Interviewer with less than 4 years' experience]

"I'm doing this for the greater good...these surveys make a contribution to society"

[Interviewer with less than 4 years' experience]

Overwhelmingly the traditional model of interviewer employment in the UK has been on a casual worker basis, with no guarantee of hours required of workers. For some employers there was a requirement for the worker to be available two or three days a week. Two models of remuneration predominated:

(a) day rate with premia for bank holiday or weekend working; or

(b) piecework (pay for performance) where field interviewers were paid a unit rate for completed interviews.

One organisation operated an annualised -hours approach, in which interviewers' employment contract stipulates a certain number of core hours to be worked over the course of the year, but with flexibility for the employer about when they can call on these hours.

In the pay-for-performance model, the unit rate was typically based on estimates of the time required for an interview, travel and response rate. However, there were variations to this model, for example: higher performing interviewers getting a better base rate than those who had not (yet) established their performance credentials; or in one case, paying for a range of survey response outcomes not just survey completion (i.e., non-contact; refusal; partial completion etc.).

Pay for the field interviewer tends towards the National Living Wage (NLW) - which is the legal minimum wage, reflecting the relatively low barriers to entry for the work.

Consequently, prior and through the pandemic, employer costs have been increasing more rapidly for field interviewers due to the accelerated growth in the National Living Wage relative to average earnings. The NLW main rate grew by 65% 2013-2023 (Source: www.nibusinessinfo.co.uk/content/national-minimum-wage-previous-rates), twice as much as the 32% growth in median earnings for full time employees in the UK (Source: data from ASHE, ONS quoted in <https://www.statista.com/statistics/933075/wage-growth-in-the-uk>). Several organisations reported using a relevant real living wage metric for pay determination for the role. The real living wage is independently calculated based on the cost of living, reflects regional variations in the cost of living and is voluntary¹.

2.2 The Field Interviewer Role Pre-Pandemic

This section summarises the purpose of the role, main accountabilities, and the competencies and attributes required for a pre-pandemic survey field interviewer according to the Field Operation Leads.

Purpose of the Field interviewer role

To seek out and engage with people to establish/confirm their eligibility to take part in the survey, gain their cooperation, and to collect data using standardised survey protocols and data collection instruments.

Key Accountabilities

¹ <https://www.livingwage.org.uk/what-real-living-wage>

The performance requirements for the role of face-to-face survey interviewer pre-pandemic can be summarised as follows.

- Understand survey goals, purpose and eligibility criteria required for subject selection and any other conditions through project packs, briefings and meetings as required.
- Organise own work schedule to complete interviews during the defined fieldwork period.
- Identify and engage positively with the subject to persuade them to take part, selling the benefits of participation e.g., personal or societal.
- Complete the survey, closely following the script as required, ensuring all interactions are in line with the survey protocol and, where required, MRS protocols. Ensure responses are recorded accurately in the required format. Complete data acquisition needed for post-survey quality assurance checks.
- Ensure technology (laptop, tablet etc.) for recording data is regularly synced/uploaded to ensure data transfer in line with project requirements.
- Ensure regular update reports are made to project team and/or supervisor as required and that other administrative tasks are completed as required, in a timely manner.

Competencies and attributes

The skills (things the role holder needs to be able to do), knowledge (things the role holder needs to know) and behaviours (how the role holder performs the work) that were required to perform the role of field survey interviewer as expected, are listed below.

Skills

- Interviewing.
- Basic IT skills, to operate the digital technologies – hardware and software – required for the role.
- Driving licence desirable, often essential.

Knowledge

- Of survey protocols, MRS guidelines.
- Basic knowledge of survey methods and data collection approaches.

Behaviours

- Communication
 - Engages positively, confidently, and warmly with people from diverse backgrounds; conveys information to others clearly and concisely; ensures consistency in how questions are framed and asked following survey protocols closely; is confident to approach people and quickly develops rapport.
- Persuasion and building trust

- Presents a case for participation effectively and logically, responding to concerns and aiming to create a safe and co-operative relationship that encourages full participation.
- Resilience and resourcefulness
 - Demonstrates a positive attitude and can perform with self-control under pressure. Does not give up easily, even when facing setbacks.
- Delivering results
 - Takes ownership of own work and delivers outputs as required in a timely and accurate manner, providing and requesting input when required to support colleagues in a way that is reliable and effective; takes personal responsibility for planning, organising and scheduling own time and work to meet project timetable and criteria.

These competencies chimed with the descriptions provided by the face-to-face survey interviewers who participated in this research. In addition to these competencies, interviewers added that in interacting with the public, the role also required empathy and emotional intelligence.

3. The changing role of the field interviewer

3.1 Impact of the COVID-19 pandemic on surveys

The COVID-19 pandemic impacted in-person survey interviewing, with national lockdowns in 2020-21 leading to a pause in face-to-face fieldwork. Since then, whilst face-to-face fieldwork has restarted, Field Operation Leads described two contrasting experiences of what has been happening to face-to-face interview volumes.

- In some areas of the industry a rich, qualitative survey experience is seen to be essential, e.g., in market research surveys used to test products and services that involve hall tests, product tests, exit interviews. In these areas of market research participants reported that commissioners were not convinced that other data collection modes would yield comparable data, and the face-to-face interviewing approach had been sustained. The volume of face-to-face interviewing work reported by participants working in these areas has remained consistent with levels seen before the pandemic, and the nature of the interviewer role has remained unchanged. Issues were focused on workforce supply challenges and lower response rates.
- Elsewhere, particularly in social survey research, the ongoing decline in face-to-face interviewing was felt by Field Operations Leads to have been accelerated by the pandemic, because of the higher costs of face-to-face data collection compared with other methods, and due to other survey data collection methods becoming more acceptable to commissioners. As one respondent commented, *“the genie is out of the bottle”*. Field Operations Leads noted the proliferation of mixed mode surveys, which they attributed to what they perceived to be a research funding environment, in which budgets and timescales were tight, and quality expectations remained high.

3.2 Impact of the COVID-19 pandemic on face-to-face survey interviewers

As a consequence of the increase in mixed mode surveys, the role of the social research field interviewer has changed. Sequential mixed mode designs are commonplace and involve participants being initially invited to take part in the survey by web and/or telephone. Face-to-face data collection is reserved for those not responding to these other (cheaper) modes, including those demographic groups that are less likely than average to respond to web survey requests. This shift in the focus of face-to-face survey interviewing can fuel a perceived sense among field interviewers, as one Field Operations Lead put it, that *“all the easy interviews are gone”*. The task of the face-to-face interviewer is perceived by Field Operations Leads to be that much harder than it used to be.

Field Operations Leads spoke of the COVID-19 pandemic accelerating the decline in survey response rates, and suggested a variety of reasons for this, some of which were

acknowledged to be more enduring than others. These reasons fall into four broad categories:

- Social behaviours and social aversion –a general unwillingness to interact with strangers combined with residual concerns over illness and infection.
- Levels of trust with government.
- GDPR-related concerns including confidentiality, data access and privacy, and fears that data will be used for purposes other than those for which the data were originally collected.
- Hybrid working and the blurring of work and non-work time. More varied working patterns mean that it is harder for interviewers to time visits that may find people at home with time to engage with an interviewer about taking part in a survey.

In addition, Field Operational Leads reflected that the pandemic has resulted in many skilled interviewers leaving the role to other flexible work and retirement. It was taking time to rebuild face-to-face interviewing capacity. The loss of so many experienced interviewers was suggested to be another factor that could be affecting survey response rates.

Field Operations Leads felt that the combination of reduced response rates due to the reasons outlined above and the acceleration in the move to web-first survey design since the pandemic was resulting in a fundamental shift in the primary emphasis of the interviewer role – from interviewing to finding and engaging individuals to take part. Survey participation might involve the fieldworker carrying out the survey interview or nudging or helping the participant to take part using another mode, such as web. This change in the primary role of the survey fieldworker was felt by Field Operations Leads to be something that field interviewers struggled with, particularly those who valued the interview interaction with members of the public, the satisfaction that comes with achieving a completed interview, and who took pride in their interviewing skills. In addition, the greater use of web-first surveys left survey interviewers being asked to focus on those demographic groups that are less likely than average to respond to web survey requests. The shift in focus towards field interviewers seeking and engaging potentially reticent members of the public is perceived by Field Operations Leads as being more demanding, requiring more interviewer-resilience and overall, as being less attractive to traditional and future potential field interviewers. Survey interviewers, in contrast, spoke of the challenges of getting people to take part in surveys in broad terms rather than challenges becoming greater post-pandemic or being related to mixed mode surveys. From their perspective, the challenges they faced reflected the failure of researchers and field operations staff to design and implement surveys that people wanted to take part in. As one interviewer with more than 4 years' experience put it:

“...the back office needs to be more proactive in getting people onboard, so interviewers are interviewing, not selling.”

Some interviewers felt that their laptops and tablets were slow and cumbersome to use, making their job more difficult.

Because of the increase in mixed mode surveys, many organisations are currently adapting the face-to-face survey interviewer role or looking to do so. Some organisations are piloting multiskilled interviewers able to complete work face-to-face,

via video or over the telephone – whether as part of self-owned case work (i.e., the interviewer is accountable for the sampled case once centrally released, seeing through to final outcome) or as an allocated individual work item. In some cases, participants indicated that this was an organisational response to workforce challenges to drive more value from a smaller pool of interviewers.

Field Operations Leads reflected that more could be done to raise awareness of the purpose of surveys, their value to society and the role of the survey fieldworker in the process, to build trust with the public and support response rates. One Field Operations Lead wondered whether as an industry

“...we are doing enough to put ourselves in the position of the interviewer to help them in their role?”

This sentiment was echoed by some of the interviewers who participated in this research. A view was that survey designers were not giving enough consideration to what survey interviewers and participants were being asked to do, resulting in some surveys being viewed as overly burdensome.

A view among some Field Operations Leads was that there would always be a need for face-to-face survey interviewers. Among those expressing this view, the fieldworker role was seen to be essential when survey requirements were more complex e.g., multi-element and multi-household surveys; research requiring bio-samples e.g., saliva sampling, or the administration of standardised screening tools e.g., cognitive function tests. The reasons for this view were not explored.

3.3 Face-to-face survey interviewer recruitment challenges

Field Operations Leads reported that the COVID-19 pandemic led to a sharp rise in fieldworker retirement and a fall in the numbers of experienced face-to-face interviewers. These and other losses to the field forces of survey organisations led to intensive recruitment activity as the industry recovered from the COVID-19 pandemic. However, recruitment has been challenging, particularly in more rural areas, with several factors contributing to these overall challenges.

One set of factors related to what Field Operations Leads perceived to be a more competitive labour market. The traditional attractiveness of the flexibilities afforded by field interviewing has declined as other sectors and employers now offer similar opportunities. Field Operations Leads felt there was increasing competition among employers for workers wanting more flexible employment. Moreover, with the growth in hybrid working, participants felt that working outdoors made the role less attractive. As a result, there was a lot of recruitment being carried out, with one Field Operations Lead noting that *“the industry has converged on [the job site] Indeed”*.

Among both the Field Operations Leads and face-to-face interviewers that we spoke with, there was a view that for workers wanting more certainty with work guarantees, the uneven availability of field interviewing work made the role less attractive. Some organisations have a requirement for labour availability of two to three days per week. Such a requirement was felt to add to the unattractiveness of the role when organisations could not guarantee the availability of work to fill those days.

Although recruitment exercises attract large numbers of initial responses to advertisements, many candidates do not meet the basic criteria of, for example, having a driving licence or being able to travel. Field Operations Leads noted that there was a high dropout rate as candidates go through the selection and training process, and the nature of the work becomes apparent. They felt that there was a smaller pool of people with the right skills and attributes, post-pandemic and that their organisations were recruiting from the same pool. There was shared view among Field Operations Leads that interviewer exclusivity had significantly declined in recent years. As one Field Operations Lead reported, *“there is less stickiness; we can't rely on interviewer loyalty”*. Moreover, interviewers can be more selective about what work they choose to accept. Field Operations Leads reported interviewers' preferences for hall tests, exit interviews and indoor work, rather than work involving travel. Interviewer recruitment was noted to be particularly difficult in more rural areas, where travel was more extensive. These recruitment challenges were ongoing, being fuelled by high levels of workforce churn. Field Operations Leads expressed frustration and disappointment that their significant efforts had reaped limited returns through traditional recruitment methods.

3.4 Changes to the recruitment of face-to face survey interviewers

Despite the impact of the retirement spike among interviewers during the pandemic, Field Operations Leads felt that the interviewer demographic remained older, tending to be populated by a retirement/pre-retirement cohort who were looking for a second job and/or highly flexible work to supplement their incomes. This demographic was reflected among the interviewers who took part in this research. Yet with ongoing recruitment challenges, Field Operations Leads felt that the industry needed to look beyond this cohort, to other groups of workers, such as students. Indeed, there were examples of interviewer recruitment targeted at students, with participants reporting mixed success. There were also examples of organisations trialling different recruitment strategies. An example was interviewer-led hiring (i.e., referrals), but this was noted to be difficult to operate at scale. Perhaps unsurprisingly, interviewers believed that the role appealed to a certain demographic (people like themselves) – who are looking for flexibility in the hours they work, have an interest in and experience of working with the public, and have the financial stability that allows them to take a job with unpredictable earnings. They struggled to see how the role could be made more attractive to a wider pool of people given the unpredictability of earnings.

Both Field Operations Leads and survey interviewers expressed concerns about whether survey managers, including commissioners, fully appreciated the challenges faced by the field interviewer workforce. Field Operations Leads reflected that it was difficult to push back against survey design decisions with operational considerations: *“a lot of design issues are fixed by the time it gets to us”* noted one Field Operations Lead. It was suggested that there could be value in Field Operations Leads and interviewers being brought in earlier, to shape the survey's design. The practicalities of how this might be achieved given design decisions are often made at the commissioning stage, were not discussed.

4. Field interviewer role changes post pandemic

4.1 Role definition

Field Operations Leads working in organisations with a high proportion of projects requiring a rich qualitative experience (e.g., hall tests, product tests, visitor experience, exit interviews), typically for market research clients, reported no real change in the face-to-face interviewer role as compared with before the COVID-19 pandemic and were not anticipating any changes. For these organisations, the key challenges were recruitment and the geographic distribution of workers.

For organisations with a high proportion of specialist social research projects, the interviewer role is changing, with additional tasks such as knock-to-nudge, telephone and online (CAVI) interviewing being added to the role. Field Operations Leads felt interviewers now need to be persuaders as well as interviewers. As such they need higher levels of motivation, tenacity, resilience, and persuasiveness as their work focuses more on harder-to-engage groups, such as those demographic groups that are less likely than average to respond to web survey requests. Interviewers felt the role has always involved persuasion but acknowledged that the role is changing. It is becoming harder to make contact and persuade people to take part in surveys, and as such the role requires new skills. Interviewers mentioned telephone interviewing as an example of a new skill some had learnt as fieldwork was switched from face-to-face to telephone during the pandemic. The interviewers who participated in this research appeared unfazed by these changes.

One organisation is working towards an aspirational long-term redesign of its survey fieldwork capacity. Its approach, still in progress, involves:

- Removing the distinction between separate field and telephone interviewer roles.
- Clearly defining different levels of interview work, with more senior roles involving more complex data collection, supervisory, support and training responsibilities. Levels are linked with pay and underpinned by development and informal accreditation pathways.
- Seeking to move away from individualised case ownership, in favour of centralised case management, which is seen to offer greater flexibility in terms of covering work. Work will become more fluid and interchangeable, with strong business rules.
- In the long-term, hiring future colleagues into the model based on clearly defined, yet flexible and changeable, work patterns: building in greater certainty of work, and greater certainty of non-work time (or time for a second job). The operational team will therefore be able to mix and match work to employee capability, location, and shift to optimise the balance between labour supply and work demand.
- Reinforcing supervisory roles to ensure they are strongly focused on people and performance management, support, and mentoring – supported by centralised case management to enable this shift in focus.

Among the interviewers who took part in this research, there was broad support for this type of approach. Early career interviewers reflected on the amount of support they received, which appeared to be variable. There were examples of new interviewers being mentored from the start and feeling well-supported. However, there were also examples of interviewers feeling abandoned once their initial training was complete and they were out working in the field. Greater support for new interviewers was proposed by those with fewer than 4 years interviewing experience to help build their skills and resilience. Interestingly, more experienced interviewers felt that the low levels of support that they had received when they were starting out had fostered their own self-reliance and resourcefulness. Opportunities to meet with fellow interviewers and supervisors, to chat and learn from each other's experiences and boost each other's confidence were valued. As one interviewer, with less than four years' experience, stated "*...even though you are autonomous*" opportunities to meet colleagues mean that "*you are not isolated*".

4.2 Emerging Field Interview Role Post-Pandemic

Changes to the social survey fieldworker role, outlined in section 3, mean that the accountabilities, competencies and attributes of the role in some areas of the industry are changing from those described in section 2.2. An updated description of the role is presented below, with additional requirements shown in the right-hand column.

Key Accountabilities-The performance requirements for the role.

On-going requirements

- Understand survey goals, purpose and eligibility criteria required for subject selection, reading project packs and participating in briefings and meetings.
- Organise own work schedule to complete interviews during the defined fieldwork period.
- Identify and engage positively with the subject to persuade them to take part, selling the benefits of participation whether personal or societal.
- Complete the survey, closely following the script as required, ensuring all interactions are in line with the survey and, where required, MRS protocols. Ensure responses are recorded accurately in the required format. Complete data acquisition needed for post-survey quality assurance checks.

New/ expanded requirements

- Appreciation of survey fieldwork design e.g. mixed mode/ web first and the role of the interviewer in this design.
- In addition to organising own work schedule to complete interviews, interviewers will also schedule engagement with sample members to encourage them to e.g. go online to complete the survey questionnaire or to schedule a telephone interview.
- May also involve informing people of other survey modes and supporting them in accessing their preferred completion mode.
- Survey completion may be in person (CAPI), via telephone (CATI), or videoconference call (CAVI).

- Ensure technology (laptop, tablet etc.) for recording data is regularly synced/ uploaded to ensure data transfer occurs in line with project requirements.
- Complete required administration in a timely manner.
- Stays up to date with varied technology required to complete work.
- Works with project team and/or supervisor to support project goals, operating flexibly as required.

Competencies and attributes - The skills, knowledge and behaviours that are required for the role to be performed as expected.

On-going requirements

Skills

Interviewing face-to-face

IT skills, to operate the digital technologies – hardware and software – required for the role.

Driving licence desirable, often essential.

Behaviours

Communication: Engages positively, confidently, and warmly with people from diverse backgrounds; conveys information to others clearly and concisely; ensures consistency in how questions are framed and asked following survey protocols closely; is confident to approach people and quickly develop rapport

Persuasion and building trust: Presents a case for participation effectively and logically, aiming to create a safe and co-operative relationship that encourages full participation.

Knowledge: of survey protocols, MRS guidelines

Resilience and resourcefulness: Does not give up easily, even when facing setbacks.

New/expanded requirements

Skills

Interviewing, whether face-to-face, by telephone or video conference call

Reasonable proficiency with additional technologies such as video conferencing platforms and telephony systems.

Behaviours

Structures available information to help others understand the key points, taking account of their perspective and potential concerns

Observes and responds to body-language and non-verbal cues, putting self in others' position to appreciate and respond to objections, and to build trust.

Reasonable knowledge of methods and approaches to data collection, understanding their implications for the work and tasks to be completed.

Resilience and resourcefulness: Demonstrates a positive attitude, performance and self-control under pressure, adversity or in the face of rejection; grows from hardships and negative experiences, keeping challenges in perspective; is optimistic, remaining confident in own skills and abilities; keeps going when under pressure having the

confidence to try different approaches; is not afraid to seek support.

Delivering results: Takes ownership of own work and delivers outputs as required in a timely and accurate manner, providing and requesting input when required to support colleagues in a way that is reliable and effective; takes personal responsibility for planning, organising and scheduling own time and work to meet project timetable and criteria.

Change readiness: is aware of ongoing change and positively engages and responds to those changes.

More experienced interviewers felt that the environment in which they worked is more challenging post- COVID in terms of making contact and gaining co-operation, and that interviewers therefore need to be more resilient and resourceful.

4.3 Implications of role change

Field Operations Leads speculated on some issues and considerations, because of role change and wider developments and these are reported below.

Pay models

Among those Field Operations Leads working in organisations operating performance reward models (pay for each individual interview completed), concerns were expressed about the ongoing feasibility of the model. With a decline in response rates, there is a growing level of risk shouldered by interviewers for the reward, as income becomes more uncertain and unpredictable. Field Operations Leads believed that this uncertainty and unpredictability makes the work less attractive to fieldworkers, citing the growing pressure to pay interviewers for their time spent doing all aspects of the work. Some organisations pay for different types of interaction, rather than just a completed interview, but organisations using this reward model acknowledged it was complex. As it gets harder to gain the co-operation of the public in surveys, there is also a risk that under a pay system that incentivises the achievement of full interviews, it might also incentivise unethical interviewer behaviours.

These concerns did not elicit any clear sense of direction of travel for Field Operations Leads and it is clear each individual organisation will take their own view. The overriding concern expressed was to ensure any change in pay models would be cost effective. As such, there was some speculation about whether a blended approach could be viable, with those organisations thinking of change looking at evolving away from performance pay/piecework by supplementing their workforce with a small group of permanently employed workers. Field Operations Leads suggested that this could be viable for those organisations with more complex work i.e., mixed-mode, and where there is a requirement for complex field interactions. Under this scenario, a higher skilled, more complex field interviewer role would lend itself more readily to an employed rather than

flexible employment model. However, such a model could become an increasing pressure if the role continues to split between market and social research interviewing. Field Operations Leads also felt field interviewers would be likely to choose work that is more focused on interviewing rather than persuasion but did not discuss this potential outcome in any detail. Lastly, Government legislation ensuring stronger worker rights for casual and zero-hour workers is a known potential impact on the employment model, which may accelerate movement away from a wholly casual labour force.

The changing role of the survey field interviewer, coupled with declining survey response rates, is leading to organisations thinking hard about this issue despite there being, for many, a strong commitment to the traditional flexible piecework model. There is good reason for this lingering commitment to this piecework model, as the irregular supply of work, and the unpredictability of its nature and location militates against organisations carrying the fixed cost burden of a more permanent workforce. Field Operations Leads reflected that they felt caught between increasingly strong and divergent forces.

Among interviewers, views on pay and reward systems were mixed. Newer interviewers perceived an unfairness in the piece rate model that penalised their lack of experience in gaining sample members' co-operation to take part. This may explain why newer interviewers tended to favour the day-rate model, with more experienced interviewers tending to favour the pay for performance model. One suggestion put forward by interviewers, with more than 4 years' experience, was that higher pay rates should be offered for more complex work and/or to those interviewers with longer experience. This suggestion is at odds with the notion that newer interviewers need higher pay rates to compensate for their (initial) lower productivity. However, this contradiction was not highlighted or discussed by interviewers.

There was also a strong view that the rules some organisations used to calculate the remuneration of interviewer travel time were unfair and needed to change.

Connection between organisations and their fieldworkers

The Field Operations Leads reflected that historically, field interviewers had been kept somewhat detached from the rest of the organisation but questioned whether it was still sensible to do so. The following arguments were put forward for strengthening each organisation's connections with its face-to-face survey interviewers through improved communication between interviewers, their managers and other parts of the organisation.

- The current perceived lack of connectivity of interviewers with the rest of the organisation may not encourage loyalty in a tight labour market, particularly among experienced interviewers who have greater capacity to pick and choose their work.
- The interviewer role potentially needs more support in the field, given its increasingly challenging nature and the requirement for greater interviewer resilience. There is also a need for better management of individual performance and unproductive interviewers.

The implication of the changing role of the face-to-face interviewer is that the role of the supervisor becomes more critical, to engage with, support and develop field interviewers. Field Operations Leads reported that face-to-face interviewer supervision was a general weakness, with the focus of this role on scheduling. In the future, the role will require skills in addressing the more complex matters of supporting individual interviewers working in challenging circumstances, coaching individuals in skills development, boosting their resilience, and managing poor performance in the field.

Among face-to-face interviewers, greater connection with the organisation was felt to be a good thing. It could help retain survey interviewers, making them feel more valued. Interviewers wanted to be able to positively affect survey design, suggesting they could (more routinely) provide feedback on proposed survey designs. This may have the additional benefit of improving survey designs, making them more appealing to the public and thus helping to halt the decline in survey response rates. Funders and agencies should consider how they can involve survey interviewers in the design process.

5. Conclusions

Discussion of the research findings with Field Operations Leads led to a set of conclusions being agreed. Of universal impact for all participating survey and market research service providers was the *impact of labour market issues*. The retirement of skilled field interviewers during the pandemic has been impactful and they are proving difficult to replace. Organisations reported significant numbers of applicants for the roles but with very few having the right skills and appreciation of the basic requirements of the work e.g., travel, driving licence, flexibility. This appears to be a universal issue affecting all areas of the industry at the time this research was carried out. Field Operations Leads perceived that applicants for low-skill roles make mass applications with little thought for the work ("*spamming*"). The impact on research organisations is a sense of being overwhelmed with large recruitment volumes that generate few individuals who continue in the role and become successful field interviewers.

Organisations also struggle with being able to supplement their demand for labour from the existing pool of experienced interviewers. They perceive they are all competing for a diminishing, common pool of skilled fieldworker labour. Efforts to target particular groups who could offer casual, flexible labour (e.g., students) have seen mixed results and the industry is suffering, like others, with the recovery in the UK employment rate (the proportion of people aged 18-64 in employment), which fell at the start of the pandemic and still remains lower than the pre-pandemic rate². Field Operations Leads also articulated concerns about the outlook for continued strengthening of casual worker rights, which could have an impact on the level of flexibility and cost needed by employers while also potentially diminishing the relative attractiveness of the sector.

The face-to-face survey interviewer *role is diverging*. In some areas of the market there is still a strong demand for face-to-face interviews, e.g. in product testing the fieldworker role has remained very similar to the role pre-COVID. However, for those employers operating more in the social research marketplace the fieldworker role is:

- Becoming more multiskilled.
- Pivoting towards a greater emphasis on contact with demographic groups less likely than average to take part in web and telephone surveys.
- Experiencing a relative decline in interviewing as a proportion of time spent in the field.
- Requiring role incumbents to be more tenacious, resourceful, and resilient in the face of persistent rejection.
- Continuing to become more complex, reflecting the use of a wider range of digital technologies and platforms, more sophisticated sampling strategies and greater use of mixed mode data collection methods.

The *existing pay for performance or piecework reward model is being challenged* by the changing nature of the work. At the heart of this challenge is the decline in survey response rates being seen across the industry, but particularly in social research. Field Operations Leads articulated their perceptions of the risks and their concerns, with

² Brooks, C., Powell, A. (2025) UK labour market statistics. House of Commons Library. Accessed online at: <https://researchbriefings.files.parliament.uk/documents/CBP-9366/CBP-9366.pdf>

some trialling different performance reward models and recruitment methods and approaches, which could be more sustainable. However, there remains a very strong attachment to the current pay for performance reward model due to concerns about the potential cost impact of change. It is perceived this is a fundamental issue because the face-to-face interview approach is much more costly relative to other methods. The situation is still in flux.

Lastly, Field Operations Leads highlighted a desire for further research, to hear the voices of face-to-face interviewers. There was a view among Field Operations Leads that working as a face-to-face interviewer is more than a job, and that job satisfaction and opportunities to engage with the public are as important as financial reward. This view was echoed among the field interviewers who participated in phase two of this research.

5.1 Potential implications and responses to challenges

Organisations will take their own decisions, but several factors are pushing organisations towards *considering higher levels of pay* to address recruitment and retention of talent:

- Continued competition for effective face-to-face interviewers within a dwindling labour pool.
- Increased role complexity.
- Decreased attractiveness of the work, potentially due to greater use of mixed mode designs and the resulting emphasis on harder to engage groups. This focus inevitably requires workers to undertake activities that are harder and with the potential for more conflict and rejection. The work is arguably just less rewarding than in the past. For the traditional retired or pre-retirement cohorts who seek community engagement as much as supplementary pay, this change may be quite impactful.

High levels of churn and recruitment volumes are ultimately issues for individual organisations to address operationally, but raising the level of pay may help with this. However, efficiency and effectiveness can also be achieved by better focusing and targeting recruitment efforts and potentially considering AI tools to reduce the administrative burden of sifting applicants.

The *issue of attracting talent* for each organisation is consistent with the efforts of the government to improve levels of employment and address the drop-off in economic activity among older workers. There may be ways to explore collaboration with local or central government to partner for mutual benefit. Organisations should also consider engaging with local enterprise partnerships to benefit from their local labour market intelligence and network opportunities. Thinking of younger workers, participants reported mixed success with student cohorts. Whether within or outside further and higher education and training, this is a cohort where casual work is often valued. Survey organisations could consider thinking through how fieldwork is structured to better meet the needs of such workers, as 2-3 days is probably too much for some. Moreover, survey organisations could consider what they can learn from charity face-to-face

fundraising companies, for example, in making an asset of the social purpose of their work that might appeal to younger workers.

A further potential organisational response, being trialled by some Field Operations Leads at the time this research was undertaken, is changing the *balance of the employment model*. Rather than delivering survey fieldwork through a wholly casual workforce, work could be primarily delivered through a core group of permanent or fixed term contracted (employee) interviewers, supplemented by casual workers to manage fluctuations in demand. Organisations where their work profile allows, could potentially introduce a tiered role, in which more complex work and multiskilling is increasingly performed by more permanent workers, with any more straightforward work being carried out by a more casual labour pool. This approach reflects the typical employment model we see in the wider economy, in which the employer typically carries the employment risk (i.e., offers permanent employment) when work is more complex, skill is selected for in the labour market and there is consistent demand for those specific skills. Under these conditions it makes economic sense for the employer to defend its acquisition of labour to get a return on its investment in the worker. Conversely, the worker carries the employment risk (i.e. the employer offers only casual or ad hoc labour) when the skills required for work are low, the role requires little training and the time taken for the worker to be effective is short. Under these conditions labour is seen to be readily replaceable, supply is abundant and there is little economic incentive for the employer to retain staff and their limited skills.

The interviewers who took part in this research in the main belonged to a cohort of older, pre- or post- retired people looking for a secondary income who have traditionally been attracted to face-to-face survey interviewing, rather than younger cohorts and those looking for a primary or sole source of income. Field interviewers suggested that employers should emphasise the unique characteristics of the role (flexibility, autonomy) for the purposes of recruitment. Employers could benefit from targeting the casual work more specifically e.g. campaigns and recruitment positioning to connect to pre-retirement groups rather than a generic advertisement on a job board. However, Field Operations Leads talked of needing to expand the recruitment pool beyond those looking for additional income, to build back their field forces post-pandemic. The survey interview recruitment challenge requires further consideration.

Considering the changing demands of the role, a potential way to support the retention of face-to-face fieldworkers will be *increasing the focus on supervisory and management skills* and changing the emphasis of supervisors. Field Operations Leads typically reported that the role of the fieldworker supervisor was primarily one of schedule organisation, field interviewer management and deployment, and in some cases, being accountable for recruitment of interviewers to their local panel. From a recruitment perspective, there have been many positive examples of supervisors being very effective in attracting people into the role of face-to-face interviewer; this can only continue to grow in importance. There was less emphasis on the role of supervisor as being one of coach, support, and manager of effective employee performance. This is unsurprising given the historic lower-level attention given to retention, but as this has changed and the role has become more demanding of the interviewer, organisations

may be minded to consider giving more attention to this aspect of the role. This is something that newer fieldworkers wanted and valued. Face-to-face interviewers could be supported to build more resilience when provided with good coaching, to build their mental strength and endurance, supporting an increase in lengths of tenure. Lastly, if organisations evolve toward having (some) employed workers – or indeed a reward model based on a time basis rather than pay per interview - this would require supervisors to be more hands-on with the management of individual performance. Supervisors play a crucial role in improving individual employee performance and in fairly and legally managing poor performers out of the business.

5.2 Potential implications and responses to challenges

Field Operations Leads and interviewers suggested raising public awareness of survey research and the role of survey interviewers. This might assist interviewers in gaining the co-operation of the public in taking part in surveys, and support interviewer recruitment and retention efforts.

An idea which could be further explored is to focus on reducing the costs and inefficiencies in the interviewer labour pool for organisations and centralising efforts to promote the role. Borrowing from ideas of digital networks or digital marketplaces, rather than individual organisations retaining their own interviewer labour, a third party could be contracted to be a source of face-to-face interviewer labour. The third party could manage entry into this labour pool through a form of accreditation for workers. It would be interesting to explore the extent to which digital tools could be used such that organisations requiring interviewers with the skills and knowledge to cover work of particular types, locations and durations could search a database of accredited labour and push work to them, so reducing the costs of hiring. This database could also potentially include workers' schedules. For workers, projects could be pushed to them reducing their need to chase work and improve their ability to obtain consistent work from multiple employers. This idea would involve formalising what is happening already in the field, by diverting monies away from competition for labour into creating a service. The owners of this service would have a vested interest in promoting the roles and increasing the pool of labour. Accreditation would be important so that workers have a stake in the network and that organisations know they are hiring appropriate workers – reducing demands for assessment and training. Outside of organisations, workers would also have a virtual hub that could potentially be a source of knowledge and community. Engagement with recruitment consultancies or similar would be useful, to explore the idea further if deemed feasible and/or desirable. However, which entity would be able to represent the industry, acting as a commissioner of the aforementioned third party, is something that would need further consideration, as would the practicalities of setting up such a third party and of interviewer accreditation.

In conclusion, Field Operations Leads wished to support this research work to raise awareness among commissioners of survey work of the changing nature of the face-to-face interviewer role and the associated challenges. There is a clear acknowledgment among practitioners that face-to-face survey work is the gold standard, but providers are under pressure to deliver. Improved appreciation by all interested parties of the context within which survey providers deliver services was felt to be valuable. The

solutions to the challenges identified in this report would benefit from further discussion, with a view to identifying which, if any, the wider research community might want to come together to work on.

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Appendix A: Field Operations Leads Interview Guide

Overview of business for context

- Going back to before the pandemic – 2018/2019 – what was the typical use for face-to-face interviewers in the suite of research methods available?
 - How did you use/deploy face-to-face interviewers? Is this random probability sampling or quota sampling?
 - Tell us about the role – accountabilities.
 - What did you look for from people to perform the role competently (not exceeding or to a high-performance level)– skills (what they can do), knowledge (what they must know) and behaviours (how they perform e.g., communication)
 - How did you employ face-to-face interviewers? (permanent; temporary; agency etc.)
- What have been some of the major strategic changes in face-to-face fieldwork since the pandemic? Has your use of face-to-face interviewers changed? Have the sampling methods/ types of survey data collection changed?
- What changes are likely to be sustained into the future (the next 5 years)? Do you foresee any other developments in this timeframe?
- What do you perceive to be some of the drivers of change – whether pull (things driven by your organisation, internal factors e.g., nature of work changing, use of technology, cost) or push (things driven by external forces to which you must respond to e.g., labour market, workforce demands etc.)?
- Thinking about the face-to-face interviewer role in the future (c.5 years' time):
 - How will you use them? How do you think the role will change – identify key accountabilities?
 - What does this mean for people - What will you look for from face-to-face interviewers – skills, knowledge and behaviours [normal performance]?
 - Is there any difference you will expect to see in terms of high performing interviewers?
- What do you think these changes will mean for:
 - Workforce planning – how many people you need, the composition of these, where you will find them?
 - The employment model – how you employ them e.g., directly/indirectly; temp/perm etc.?
 - Sourcing – where you will get the people?
 - Recruitment process – how you will select people?
 - Management of people – how they will be managed?
 - Their development – how you will train and develop them?
 - Pay – levels and nature of pay?

Post interview reminder on commercial sensitivities.

Appendix B: Survey Face-to-Face Interviewers Focus Group Guide

Introduction

- Welcome

Background

- This exercise today is part of a wider study by the field research and marketing industry into how the role of the field-based interviewer has changed in recent years and what this means for workers, employers and survey funders.
- This research is called Survey Futures and is funded by the ESRC, the Economic and Social Research Council. The ESRC is funded by the government to support research and training in social sciences in the UK.
- The work we have already completed was talking to field research managers working for 11 public and private employers of field-based interviewers. This led to a report and presentation which has helped the industry understand better the challenges being faced in the world of field interviewing.
- An outcome of this work has been a recognition that it would be valuable to hear the voice of the interviewers; to listen to the people doing the work and hear their views and experiences. This insight would then be feedback to employers and commissioners of work in the whole social research and survey marketing sector

Overview of activity

- First of all, thank you for volunteering your time to take part. The plan today is for me to ask you a number of questions and to capture your views. It is about your opinions and experiences so there isn't a right or wrong answer. All opinions are valid. Sharing and having a discussion is positive but we don't need to come to a consensus. My role is to ask the questions, manage the flow of our time together and ask any clarifying questions to make sure I understand well. We have an hour and a half together.
- All views expressed here are in confidence. This is one of 4 focus groups. Participation is voluntary and are drawn from companies that took part in the primary research activity. We would ask that you respect the confidentiality of people in the group too.
- I will be writing up in aggregate the outcomes from all the focus groups; I might use a quote, but nothing will be attributable, and it is fully in confidence; the research organisation that shared the invite will not know you have taken part. No one will know what was said by whom.
- We are recording this session, for the purposes of note taking afterwards. It is only temporarily stored on my hard drive to which only I have access. Once this has been done it will be deleted.
- We are not planning to have a formal break but if you need to step away then please feel free to do so.

- Any questions or concerns?
- First of all, personal introductions: Full Name, experience – time and nature of work (let us know of an example study or project you have worked), and whether you are urban or rural where you work. We don't need to know who you work for. I have a list of expected participants for this session to make sure you get your voucher.
- The plan today is to divide our time up between three different broad areas – what you think of the work; how does this compare to other work you do; what can employers do to make the work more attractive. I might need to move us on occasionally to keep us on time.

Questions

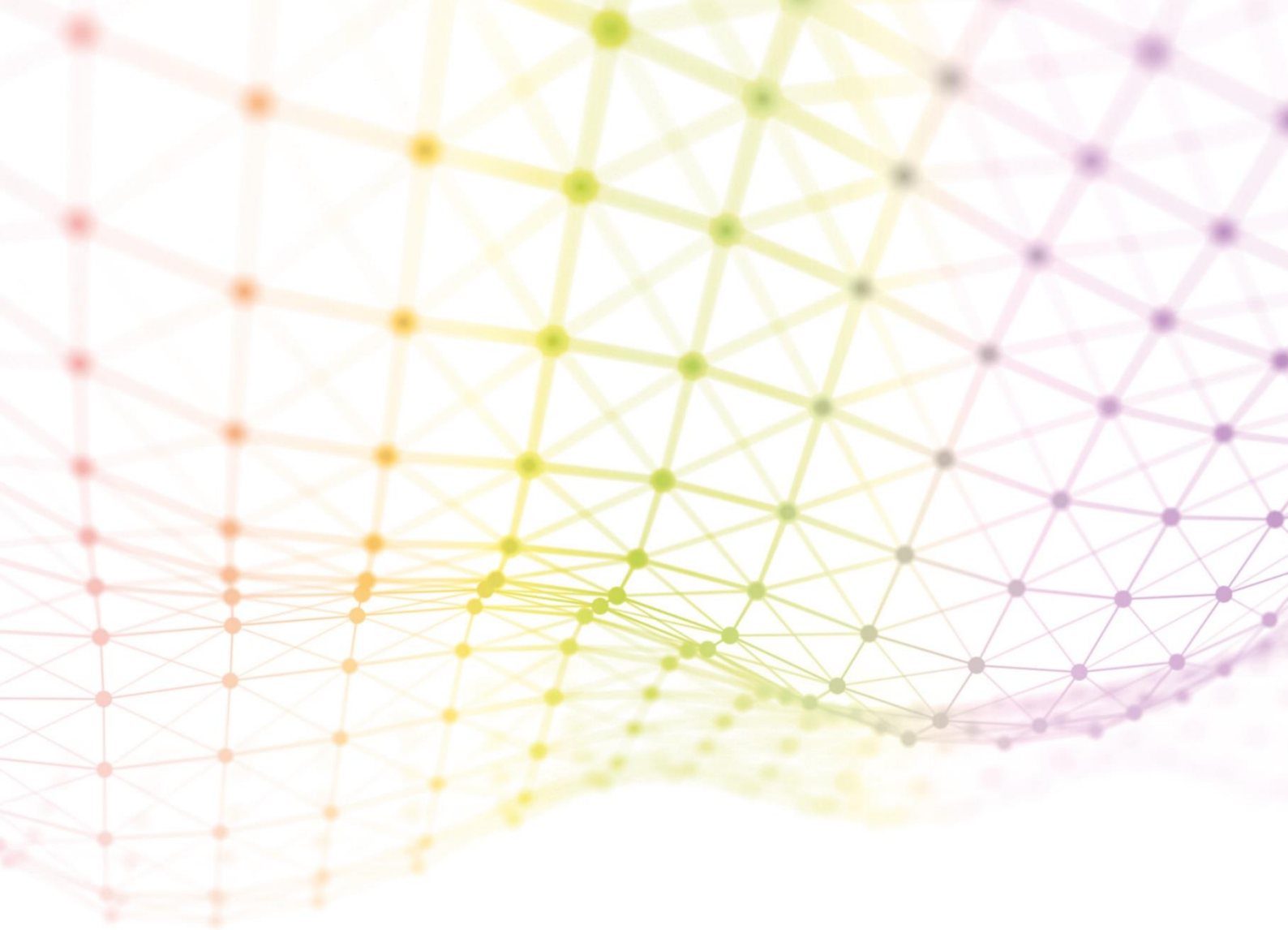
- What attracted you to this kind of work - what do you like about this work? What do you dislike? Is the role what you expected it to be?
- Compared to a few years ago – before the pandemic hit in March 2020 – how do you think the job has changed, if at all? If you've done the job for a more than 4 or more years, has the job of a field-based interviewer got harder, easier or stayed the same? [Are the skills you need different now?]
- What sort of person do you think is good at this kind of work? What is it that you need to be good at to succeed at this kind of work?
- How easy or difficult is it to find this sort of work?
 - Do you just work for one company or a several?
 - How do you find the work?
 - Do you prefer certain sorts of companies or types of work over others? What is it they do?
- Do you prefer to do this sort of work compared to others you could do?
 - What other work do you do?
 - Is this an attractive job to do these days?
 - What do you prefer about field interviewing compared to other work? What do you dislike? What is about the other work that is better?
- What are the barriers to you doing more of this work compared to other work you could do?
- What could *employers do* to make you do more of this work compared to other sorts of work you could do? [prompts, example: managers, pay, pay structure, role design, guarantees of work, permanent employment, do you get the support you need to do this work]
- Is there anything else you would like to add before we close?

Close

- Many thanks for your time
- You'll receive the voucher via email within a week. Do check your spam just in case the mail from NatCen goes there. It will be to which everyone you used to register and receive the invite to the group

- Next steps: these findings will be written up and then shared with employers and commissioners of research surveys. It will also be published on the Survey Futures website once it is complete, in the next few weeks. You can just google it, but it's surveyfuture.net.

[Notes: £30 love to shop voucher that is accepted at a wide range of retailers; sent via email, see your invite. Don't have ability to give cash out. If it is not received by the participants, get in contact with xxx.xxx@natcen.ac.uk.



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