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SURVEY DATA COLLECTION METHODS COLLABORATION

Survey Practice Guide 4: Video Interviewing

Matt Brown[1], Tim Hanson[2], Marc Asensio[1], Carina Cornesse[3], Martin Wood[4], Samantha Spencer[4], Carole Sanchez[1], Helena Koerber[1] Gabriele Durrant[5]

[1]University College London [2]City St. George's, University of London [3]GESIS - Leibniz Institute for the Social Sciences [4]National Centre for Social Research [5]University of Southampton

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Survey Futures is an Economic and Social Research Council (ESRC)-funded initiative (grant 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, benefitting from additional support from the Office for National Statistics and the ESRC National Centre for Research Methods. This guide is an output of Research Strand 3, "Video Interviewing", led by Matt brown. Further information can be found at www.surveyfutures.net.

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Executive summary

This guide provides a comprehensive overview of key considerations when determining whether and how to offer video interviewing for quantitative survey research. It is aimed at survey practitioners who may be considering using video interviewing to conduct a social survey.

The need for such a guide arises because video interviewing was rapidly adopted for survey data collection during the COVID-19 pandemic, often without established best practice. Drawing on the small but growing field of literature on video interviewing, alongside examples from studies where the method has been used, this guide offers practical advice to support better planning and delivery of video interviews.

<u>Use of video interviewing (chapters 2, 3, 13, 14 and 15)</u>

- Video interviewing was rarely used for quantitative social surveys before the pandemic but was then quickly developed and utilised in a range of different UK studies. This included cross-sectional and longitudinal studies, studies covering different populations, and a range of mixed-mode designs. It has generally been used as a complementary rather than a standalone data collection mode.
- Evidence shows that video interviewing can be implemented across different survey contexts, though it may be more successful, and effective for certain study types than others, such as:
    - Longitudinal or panel surveys (versus cross-sectional surveys) where relationships with respondents are established and contact details already held
    - Studies requiring complex interviewer-administered content such as cognitive assessments, data linkage consents, or tasks involving visual materials (where the alternative may be a self-administered approach)
    - Situations where in-person interviewing is (more) costly or impractical
    - Studies among populations with access to and familiarity with digital technology
- Cost-benefit trade-offs must also be considered. In simple terms, would the number of people who would participate by video be sufficient to justify the costs?
- Even when large scale roll-out of video interviewing is unsuitable, offering video interviewing as an optional mode could make surveys more inclusive and accessible and secure the participation of some groups who may be less able or willing to take part in other ways.

<u>Video interviewing platforms (chapter 4)</u>

- It is usually recommended to use familiar and well-established platforms for video interviewing (MS Teams or Zoom). These platforms are widely used, found to be

intuitive, and won't require respondents who have used them in other contexts to learn new processes. Browser-based access should be provided so that respondents don't need to install software or set up accounts.
- The security of platforms needs to be carefully considered – for example, it is important to use licensed versions and to communicate to respondents how their data will be used.
- For large-scale operations or surveys with specific needs, organisations might consider purchasing or developing a bespoke video interviewing platform.

Recruitment of respondents (chapter 5)

- Recruitment for video interviews can be conducted through various methods, with remote approaches generally offering greater cost-efficiency than in-person strategies. The choice of method depends on available resources, as well as the study's design, history and access to sample frames.
- Careful planning is required to ensure appointments for video interviews are kept. This includes having a simple process for respondents to book appointments, sending reminders that include links to the video call, and being flexible and responsive regarding interviewer availability.

Preparing interviewers to deliver video interviews (chapters 6, 7 and 8)

- An important consideration is deciding which interviewers should conduct video interviews. Options may include whether to use face-to-face or telephone interviewers and whether to use a small, specialist team of video interviewers or equip and prepare a much larger share of a field force to do this. This decision will typically be shaped by both agency-level and survey-level factors.
- The video set-up for interviewers needs to be carefully considered, especially in cases where interviews are carried out from home. This includes a need to maximise privacy for both interviewers and respondents.
- In terms of equipment, interviewers will at minimum require a laptop or tablet to run the survey software, the video-interviewing software (e.g. Teams), a camera and a microphone. Different approaches have been used – sometimes using a single device for the survey software and video call and sometimes using separate devices or screens for each.
- The practical set up for video interviews must be thoroughly tested and interviewers familiar with it before carrying out 'real' survey interviews. Dedicated training should be provided for interviewers, covering technical skills needed, platform-specific elements, best practice when conducting video interviews (e.g. building rapport with respondents, minimising security risk), and trouble-shooting issues that arise during interviews. Piloting is also essential.

Interviewing experience for respondents (chapters 9 and 10)

- In most cases, it is recommended that respondents can participate in a video interview using any internet-enabled device they choose, though they may be advised to use a larger-screen device (if available) if materials need to be shared during the interview. User testing should be carried out with 'real respondents' using a range of devices.
- Most studies have found that respondents can complete long video interviews (e.g. up to an hour) without major problems. It is especially important to be up front about the length of a video interview, where respondents will often be sent an invitation for a specific time slot and be less able or willing to give time beyond this.

Sharing materials and complex tasks (chapters 11 and 12)

- A key advantage of video interviewing (over telephone interviewing) is being able to share visual materials in real time (e.g. showcards, videos, leaflets, documents). Different approaches can be taken to sharing visual materials: these should be thoroughly tested.
- Special consideration is needed when carrying out video interviews for surveys that include non-standard or complex tasks. This may include self-completion elements, cognitive assessments, data linkage consent, among other tasks.

Assessing effectiveness (chapter 13)

- As part of pre-testing/piloting, feedback on the video interviews should be collected from both respondents and interviewers. This is especially important if the method has been newly introduced in an organisation or for a particular survey, or if elements of the design or process differ from what has been done before.
- Feedback questions should be designed to capture information on the interview experience, any technical issues, the level of comfort felt in the interview, and practical questions on use of visual materials and devices.
- It is advisable to consider what additional paradata should be collected to inform and assess the video interviewing experience.

1. Introduction

The survey landscape has significantly evolved during the last decades with rapid change driven at least partly by technological advancements. The widespread adoption of the Internet, the proliferation of devices with integrated cameras, and the rise of online video software, along with an increasing reliance on video technology for social and business communication, has led to increased interest in the use of video interviewing as a mode for survey data collection (Anderson 2008; Jeannis et al. 2013; Conrad et al. 2023; Endres et al. 2023).

In this guide, we define a video interview as a survey interview conducted in real-time, with face-to-face interactions between an interviewer and a respondent, conducted via video conferencing software (Durrant et al., 2024). Some surveys have made use of pre-recorded video interviewing (Conrad et al. 2023) but our focus is exclusively on the live, synchronous format. Due to persistent and growing challenges in in-person data collection processes such as declining response rates and increasing costs (Schober et al. 2023; Centeno et al. 2024) as well as the shift to remote methods during COVID-19 pandemic restrictions, it has become increasingly common for large-scale studies to make use of video interviewing to collect data. Notable examples include the 1970 British Cohort Study, the National Child Development Study, the English Longitudinal Study of Ageing, the European Social Survey, and the American National Election Studies.

Although in-person interviews were long considered the “gold standard” in survey research, this status is increasingly being questioned. Video interviewing could potentially offer a compelling alternative or complementary mode by preserving the interpersonal dynamics of in-person interactions while leveraging the flexibility and efficiency of digital tools (Sun et al. 2021; West et al. 2022).

In practice, video interviews aim to combine the strengths of interviewer-administered surveys with the scalability and cost-effectiveness of web-based approaches (Hanson et al., 2025). They may be especially valuable in specific contexts such as reaching low literacy populations (Höhne et al. 2024), conducting longitudinal panel studies (Hupp et al. 2024), collecting complex data (e.g., consent for data linkage), or simply offering an alternative for respondents.

Despite their promise, video interviews remain a relatively new and underexplored method. Recent studies have begun to examine the impact of video interviewing on data quality with research so far typically suggesting comparable data quality and minimal measurement differences between interviews conducted in-person and by video (Conrad et al. 2023; Endres et al. 2023). However, there is still limited guidance on how to design and implement video interviewing effectively at scale (Schober et al. 2020).

This guide aims to fill that gap. It offers practical insights for survey practitioners on the key considerations in designing video interviews and provides actionable recommendations for their successful implementation.

The guide is structured into chapters, each addressing a critical aspect of video interview deployment. Throughout, we highlight the practical implications of methodological choices.

2. Use of video interviews to date

Video interviewing has a range of potential benefits which have been discussed in the literature. Anderson (2008) argued that video-mediated interviews, by preserving elements of face-to-face interaction, can offer several advantages over self-administered surveys. These include enhanced social presence, stronger rapport, greater respondent satisfaction, and more efficient communication. Jeannis et al. (2013) also highlighted the ability of video interviews to visually authenticate respondents and capture nonverbal cues. Additionally, video interviews allow for the use of visual aids, which can support tasks such as recalling past events. Furthermore, the fact that video-interviewing shares many common features with in-person interviewing should reduce the potential for differences in how people respond to questions between these two modes.

Despite these theoretical advantages, video interviews were rarely used in large-scale quantitative surveys before the COVID-19 pandemic. They were more commonly employed in qualitative research, including in-depth interviews (Irani, 2019; Weller, 2017), online ethnographic fieldwork (Howlett, 2022), and virtual focus groups (Forrestal et al., 2015). In these contexts, cost efficiency was a key driver of adoption (Irani, 2019).

The pandemic prompted a rapid shift from in-person to remote data collection methods (Durrant et al., 2024) with several studies adopting video interviewing.

Some studies used video interviews as the primary mode during parts of the fieldwork period. For instance, the National Child Development Study (NCDS, Age 62 Sweep) initially relied on in-person interviews but switched to video-only during the pandemic, before reverting to an in-person first model with video as a back-up option once restrictions were lifted. The 1970 British Cohort Study (BCS70, Age 51 Sweep) and English Longitudinal Study of Ageing (ELSA, Wave 10) took a similar approach. NCDS conducted over 2,000 video interviews and BCS70 conducted over 3,000. During the video-only phases, NCDS achieved a response rate of 48%, BCS70 46% and ELSA 25% (Durrant et al., 2024). These studies benefited from being longitudinal in nature, with pre-existing contact information (e.g., email and phone numbers) and established relationships with participants, which helped to facilitate successful video-based data collection.

The ERISK cohort study, which follows a sample of twins in the UK, is conducting all interviews in its Age 30 follow-up via video (Kings College London, n.d.). A particular benefit of video interviewing in this study has been to facilitate follow-up of those living overseas.

In the UK, studies such as Next Steps (Sweep 9) and Children of the 2020s (Wave 1) used video interviews as a supplementary mode. Next Steps used a web-first mixed mode approach, with video interviews being subsequently offered as one of a range of options to web non-respondents (Ipsos, 2024). In Children of the 2020s video interviews were offered to those reluctant to participate in-person (Ipsos, 2023).

In the tenth wave of the European Social Survey, which followed a cross-sectional design, video interviews were introduced as a complementary method alongside traditional in-person interviews (Hanson et al., 2025). Adoption rates varied significantly by country, from almost no use in some countries to as high as 37% of all achieved interviews in Iceland.

Outside Europe, the American National Election Study (2020) used video interviews as the primary mode in a mixed-mode design that also included web and telephone options. Although video interviews accounted for the largest share of completed interviews, they had lower response rates than the web-only and web-plus-telephone modes (Guggenheim et al., 2021). In Australia, the Life in Australia panel (2022) introduced video interviews as part of an experimental methods comparison study. Of 1,399 invited panel members, 600 completed video interviews (Cornesse et al., in press).

These examples demonstrate that video interviewing can be implemented across a range of survey contexts, particularly when supported by established respondent relationships.

3. Whether to use video interviewing

Determining whether to offer video interviewing as a survey mode requires careful consideration of study design, practical feasibility, and value for money. As noted in Chapter 2, video interviewing has been effectively deployed by a range studies, in a number of different ways but the mode is not universally suitable. Decisions about its deployment should balance cost-effectiveness, respondent accessibility, data quality, and operational considerations.

Key contexts where video interviewing may be advantageous

Video interviewing is likely to be most beneficial in the following scenarios:

- **Longitudinal or panel studies** where participant relationships are already established and contact details (including email or telephone numbers) are maintained. Participants are more familiar with the study and the purpose of the research, which can make them more willing to participate through a new or less familiar mode. Up-to-date contact information also enables direct invitation and scheduling of video interviews via phone, email, or text, without the need for in-person visits which can substantially lower fieldwork costs (Hupp et al., under review).
- **Studies requiring complex interviewer-administered content** such as cognitive assessments, data linkage consents, or tasks involving visual materials. Studies such as NCDS, BCS70 and ELSA administer a range of cognitive assessments which were designed to be administered face-to-face. These elements typically rely on interviewer guidance to ensure standardised administration, comprehension, and respondent engagement which cannot easily be replicated in self-administered modes. Evidence suggests that administering such assessments in web surveys can result in significant mode effects (e.g., Emery et al., 2023; Ofstedal et al., 2021) but video interviewing provides a means to deliver these tasks remotely while retaining the advantages of real-time interviewer support and oversight. Through features such as screen sharing and visual prompts, interviewers can guide respondents through complex question sequences, display showcards, or present stimulus materials in a controlled and consistent manner. Consent rates to data linkage are typically found to be significantly lower in self-administered modes than interviewer administered modes (Al Baghal et al., 2020; Jäckle et al., 2021; Jäckle et al., 2022; Jäckle et al., 2023; Sakshaug et al., 2017; Thornby et al., 2018) but evidence from NCDS, BCS70 and ELSA shows that consent rates achieved by video are comparable with those achieved in in-person interviews (Durrant et al., 2024).
- **Situations where in-person interviewing is (more) costly or impractical**, such as dispersed samples, rural or hard-to-reach populations, or where interviews with those living overseas are required (Kings College London, n.d.).

- **Populations with access to and familiarity with digital technology**, for whom video communication is routine and unlikely to deter participation.

In all of these situations video interviewing will likely work best when used as part of a sequential or concurrent data collection design rather than as a standalone mode. Evidence suggests that if offered as the sole mode of data collection, video interviewing would likely achieve response rates significantly lower than could be achieved in-person (Durrant et al., 2024). or by web (Guggenheim & Howell, 2021; Conrad et al., 2023). Video-interviewing could be used in a web-first sequential mixed mode approach, offering a video option to web non-respondents (possibly prior to issuing to offering in-person visits) or could operate concurrently with in-person interviews where respondents can choose their preferred mode.

Situations where alternative modes may be preferable

Video interviewing may well not be an effective option for:

- **Cross-sectional studies** that rely on address-based sample frames without pre-existing respondent contact information. Studies which do not involve interviewers and rely solely on postal recruitment will likely struggle to recruit participants to take part in video interviews. Studies that can send interviewers to participant addresses may be better placed to introduce the video option, as interviewers can explain the process in person and help schedule an appointment during the visit. However, this reduces much of the cost advantage associated with remote interviewing, since an in-person contact is still required to initiate participation. There are practical advantages with carrying out the interview 'there-and-then' (where this is possible) rather than going through the additional steps of arranging a video interview. For these reasons, video interviewing is generally less suitable as a primary mode for cross-sectional studies, unless supplemented by alternative contact information or pre-recruitment through other channels.
- **Studies prioritising maximum coverage**, where digital exclusion or low broadband penetration risks excluding key population groups.
- **Research requiring physical measurement or observational data** that cannot be captured remotely.
- **Surveys where expected take-up of video mode is low**, meaning that the additional development and interviewer training costs are not justified.

Cost–benefit considerations

As discussed in Chapter 14, the relative cost-effectiveness of video interviewing depends largely on scale, sequence, and study design (Hupp et al., 2025).

- **Compared with web self-completion**, video interviewing is generally more expensive due to interviewer time and training and therefore is most justified where

interviewer involvement is likely to have a significant impact on data quality – for example, if achieving high rates of consent to data linkage is of the upmost importance.

- **Compared with in-person interviewing**, video interviewing offers substantial savings by removing travel time and expenses, allowing a smaller centralised interviewer team to cover a wider sample. The cost advantages are greatest when video is to be used at scale.
- **Fixed costs**, such as developing protocols, training materials, and adapting survey instruments, can be considerable. These investments are most easily justified where video interviewing is expected to form a recurring part of an organisation's data collection operations.

In smaller studies or those using video interviewing only for a limited subset of respondents, the additional fixed costs may outweigh the benefits but for larger-scale or multi-wave studies, these start-up costs can be offset over time, yielding longer-term efficiency gains.

4. Platforms

In recent years, a variety of video interviewing platforms have been tested for survey data collection including Zoom, Microsoft Teams, WebEx, BlueJeans, Google Meet, and Apple FaceTime (Steiger et al, 2022, Centeno et al., 2024).

Most studies have ultimately used either Zoom or Teams. This makes sense from a user perspective. These platforms are widely used and won't require respondents who have used them in other contexts to learn new processes to take part in a video interview. The functionality has also been found to be quite straightforward (Wood et al., 2020; Phillips et al., 2023; Centeno et al., 2024).

Regardless of the platform, it is essential to allow respondents to use browser-based versions of platforms which do not require them to download software or register for accounts (Hanson et al., 2021). This approach minimises respondent burden and protects their personal data from being used beyond the scope of the interview.

A key decision is whether to offer one platform or allow respondents to choose from several. While offering multiple platforms increases flexibility, it also introduces complexity in terms of interviewer training, troubleshooting, and security management. Most studies have opted for a single platform, which simplifies logistics for survey organisations and interviewers.

It is important to consider the security arrangements of platforms and ensure that suitable agreements are in place. This will usually mean using licensed versions of platforms rather than free ones, but it is expected that most survey organisations will have licensed versions of Zoom or Teams (for example). In the U.S. some large-scale studies such as the Medical Expenditure Panel Survey (MEPS) and the American National Election Studies (ANES) have used ZoomGov, a version of Zoom designed specifically for U.S. government use but are now transitioning to Microsoft Teams due to data security concerns and the improved features offered by Teams (Centeno et al., 2024).

It needs to be clearly stated to respondents how their information will be used. This is particularly important where video interviews are being recorded. In general, it is advised not to record interviews unless the recordings will be used for a specific purpose (e.g. quality control or to analyse interviewer-respondent interactions (see Chapter 13). If recordings are required, the purpose needs to be communicated to the respondent. How recordings will be stored also needs to be considered, especially as files can be very large.

The main functionality needed for many video interviews (beyond the video call itself) will be screen-sharing to show visual material – e.g. showcards. Screen-shared materials can render differently on different platforms. For example, they tend to fill more of the screen in Zoom (Steiger et al., 2022). This can be beneficial in making the materials larger for respondents to read but can result in video windows obscuring part of the text in shared documents (especially where respondents are using a mobile device). It is therefore important to user-

test screen-sharing functionality across different devices. For more considerations about screen sharing see Chapter 11.

As noted above, most studies have so far used 'off the shelf' platforms (e.g. Zoom or Teams). However, there is one example of a bespoke video interviewing platform: CAVIsio (Fradier & Martin, 2023). CAVIsio is designed to overcome some of the challenges associated with conducting video interviews using platforms such as Zoom or Teams – i.e. the potential need to use two devices (see Chapter 7) or the need to toggle screen sharing on and off to display visual material such as showcards (see Chapter 11). CAVIsio allows the information visible to respondents and interviewers to be individually tailored and for this to vary from question to question as required.

The decision as to whether to develop a bespoke platform will depend on the scale and nature of studies organisations plan to carry out using video interviews. For example, if organisations see video interviewing as becoming a large and permanent share of their data collection offering, or if certain studies have specific needs which would pose challenges for off-the-shelf platforms, there may be a bigger case to invest in bespoke platforms. If new platforms are being developed and used, organisations need to consider security implications (e.g. need for encryption) and ensure processes for respondents to join video calls are straightforward (Fradier & Martin, 2023).

5. Recruiting respondents for video interviews

Recruitment for video interviews can be conducted through various methods, with remote approaches generally offering greater cost-efficiency than in-person strategies. The choice of method depends on available resources, such as budget, staffing, and contact information held, as well as the study's design, history and access to sample frames. Longitudinal studies are particularly well positioned for remote recruitment, as such studies will generally have collected multiple forms of contact information (e.g., postal addresses, phone numbers, and email addresses) over time. In cross-sectional studies, addresses may be the only information available in the sample-frame meaning postal invitations or in-person recruitment will be required. When multiple contact methods are available, combining them can enhance recruitment success.

Cold calling via video is unlikely to be practical or successful so appointment scheduling will generally be necessary. In some cases, on-demand video interviewing is possible, where participants can call a video hotline listed in their invitation and wait in a virtual lobby until an interviewer is available. This setup may include a display showing estimated wait times or interviewer availability (Guggenheim et al. 2021).

When recruitment is done by phone, appointments can be scheduled during the call, with the recruiter sending a follow-up invitation. Alternatively, letters or emails may include a link or QR code to a scheduling tool. Tools like Calendly have been used in video interviewing studies (Larsen et al. 2021), though some organisations develop custom tools to better meet their needs. Ideally, these tools should allow participants to cancel or reschedule if needed. Once participants access the scheduling tool, they can view available time slots, select a preferred time, and enter their contact details. After booking, participants receive a confirmation email with a calendar invite and a personalized video call link. This email could also include instructions on preparing for the interview such as checking internet connectivity, using a device with a camera, and ensuring a quiet environment. Participants may be advised to use a larger screen for longer interviews or when visual materials are to be shared. Information sheets (e.g. on data protection) and contact details for technical support are often included.

Good preparation is essential, and it is recommended that video interviewers join the 'meeting' 5 to 10 minutes before the start time with all the necessary equipment ready to ensure they are present when the respondent arrives (Sanchez et al., 2023).

No-shows may be more common with video interviews than for in-person interviews. In the Age 30 follow-up of the E-RISK cohort study, which is following twins and conducting all interviews via video, the no-show rate is as high as 40%. To reduce no-shows, it is recommended to send reminders. These reminders should include the video call link and contact information for assistance. Even with reminders, some participants may miss their appointments. Interviewers should wait a few minutes and, if needed, send a follow-up message offering to reschedule.

Many participants book interviews shortly after receiving the invitation, so it is important to be able to offer slots within the same week (Kemmerling et al., 2025). Preferred times often include lunch breaks and evenings, so interviewer availability should align with these preferences to avoid losing potential respondents.

If a participant misses their appointment, a follow-up email should be sent with a link to rebook. Ensuring flexibility and responsiveness in the scheduling process is key to maximizing participation and maintaining a positive respondent experience.

6. Use of interviewers

An important consideration when organising video interviews is deciding which interviewers should conduct them. This decision will typically be shaped by both agency-level and survey-level factors. Some agencies maintain separate panels of in-person and telephone interviewers and may prefer to allocate video interviews to one of these existing groups. The design and scale of the survey will also influence this decision. For instance, if video interviewing is only to be used as a back-up to other modes and a small number of cases are expected, then a limited number of video interviewers may be needed. In mixed-mode surveys, the combination of modes being used can further shape how interviewers are selected for video interviewing.

There are also interviewer-level considerations. Some interviewers may already be familiar with video call technology and comfortable conducting interviews in this way, while others may be less confident or experienced and more hesitant. The feasibility of engaging only those interviewers who are most willing to carry out video interviews will depend on the specific demands and scale of the study.

One potential advantage of video interviewing is that it decouples the interviewer from the participant's geographical location. This opens the possibility of allocating cases differently compared with in-person interviews - for example, concentrating video interviews among a smaller, more specialised group of interviewers.

Video interviewing may be combined with different modes in various ways, but one of the most common is to combine video and in-person interviews. This can be done concurrently (i.e. both options offered to respondents at the same time) or sequentially (i.e. one of the methods offered before the other).

Where in-person and video interviewing are combined, there is a need to consider the most suitable approach for the organisation of interviewers across the two approaches. We see two main options for this (Hanson, 2025):

- Option A: Establish a specialist team of video interviewers, separate to those carrying out in-person interviews
- Option B: Allow all (or most) in-person interviewers to also carry out video interviews

Which option is best will depend on the nature of the study – for example whether the two approaches are being used concurrently or sequentially and the expected scale of each approach. It may also be partly determined by organisational/management practices and preferences in research agencies. In the table below, we set out some possible pros and cons for options A and B.

Table 1: Pros and Cons of Specialist Video Interviewer Teams vs. All-Interviewer Approach

Approach	Pros	Cons
Option A: Establish a specialist team of video interviewers, separate to those carrying out in-person interviews	• Potentially improved data quality and respondent experience, as interviewers tend to have greater experience and expertise (which may also boost response rates). • Stronger central oversight and management, making it easier to monitor interviewer performance and provide targeted support. Oversight may reduce the risk of damaging interviewer effects. • Simplified provision of training and equipment for video interviewers. • Fewer interviewers needed. • No need for interviewers to be located near participants geographically.	• More complex coordination between in-person and video interviewers, especially with concurrent approaches. Where email addresses and telephone numbers are unavailable, in-person interviewers must make initial contact and then transfer the case to a video interview, adding steps and potential delays. (This could be mitigated by a self-serve web-based booking system.) • Risk of interviewer effects if a small number of interviewers conduct many interviews (though random case allocation could help avoid geographical bias). • Resource constraints may arise, e.g. delays in scheduling when relying on a limited number of interviewers.

Option B: Allow all (or most) in-person interviewers to also carry out video interviews	• Most seamless in concurrent mode designs, where interviewers can easily switch between in-person and video interviews and coordinate directly with respondents without added steps. • Not being reliant on a small number of interviewers – increases flexibility and may reduce risk of delays in scheduling video interviews.	• Individual interviewers may gain limited experience with video interviewing, especially in concurrent designs, potentially affecting interview quality and making troubleshooting harder. A lack of confidence could also lead to the mode being underused. • Harder to maintain oversight and quality control of video interviews. • More costly and complex to train and equip interviewers (e.g. providing devices, screens, and platform accounts), which may be inefficient if only a small number of video interviews are conducted.

Interviewer pay

Fieldwork agencies will have their own interviewer pay structures, but video interviewing introduces additional considerations depending on the approach used:

- If the same interviewers are conducting both in-person and video interviews, based on participant preference, standard payment per productive interview remains appropriate. The fee for each interview would typically not differ between modes, unless the study places greater value on one mode over the other.
- If field interviewers are required to hand over cases to a centralised team of specialist video interviewers, then field interviewers need to be appropriately incentivised. Gaining cooperation, often at a doorstep, is a challenging task so a referral payment for securing agreement to a video interview is likely important. Whether this payment

is made at the point of referral or only after the video interview takes place should be carefully considered.

- Where interviews are conducted within a centralised team (e.g. a Telephone Unit), payment is typically made per shift, especially when cases are managed via a centralised call scheduler and individual interviewers do not "own" specific cases.
- If a centralised group of interviewers is assigned specific cases from the start of fieldwork (as might be appropriate in longitudinal studies), linking interviewer pay to productivity may be more suitable.

7. Video interview set-up for interviewers

Like telephone interviews, video interviews can be conducted from central locations, such as call centres. But to-date, most large-scale studies which have used video-interviewing have involved interviewers working remotely, typically from their homes.

Interviewers conducting video interviews from home should ensure they work from a space with minimal background noise. Areas of the home in which disruptions from other household members are likely should be avoided to minimise distraction and ensure privacy for participants. The use of a simply designed virtual background is recommended as this helps foster a standardised experience for participants and maximises privacy for interviewers (Schober et al., 2020). Survey agencies can provide their interviewers with a standard background to ensure consistency across interviews. Use of the background blur function is another option but regardless, interviewers should ensure that there is minimal clutter in the camera's view and should dress professionally. In addition, the location should be well lit, so that respondents can clearly see the interviewer, but back-lighting which could cause glare should be avoided. Interviewers should be given clear guidance on these points.

At a minimum, interviewers will require a laptop/tablet to run the survey software (e.g. Blaise), the video-interviewing software (e.g. Teams), a camera and a microphone. If video interviews are to be conducted by interviewers who typically conduct in-person interviews and their 'standard' interviewing device contains a microphone and built-in camera then it is possible to conduct video interviews with this single device, without the need for additional equipment. This approach was successfully adopted in the UK by NatCen, Verian and Ipsos to conduct video interviews in the National Child Development Study[1], 1970 British Cohort Study[1], ELSA[2] and Next Steps[3]. An alternative approach is to use two devices (or screens) - one for the video-call and for sharing visual material, and one for the survey-software. Some studies have opted to use a mobile phone as the second device on which the video-call takes place.

In in-person interviews, the interviewers' screen is not typically shown to participants unless they are instructed to do so when administering particular questions. Showcards are often used to present participants with answer options (see Chapter 11 for more discussion about the use of showcards and other visual materials). Replicating this approach in video interviews using one device can be challenging as interviewers may need to toggle the 'share-screen' function on and off and/or manage multiple windows. Using two devices can make this process more straightforward, resulting in a more seamless interview, but provision of additional devices increases costs.

[1] Conducted by NatCen and Verian
[2] Conducted by NatCen
[3] Conducted by Ipsos

Figure 1

Examples of a two-device set-up from ANES (left) and ESS (right)

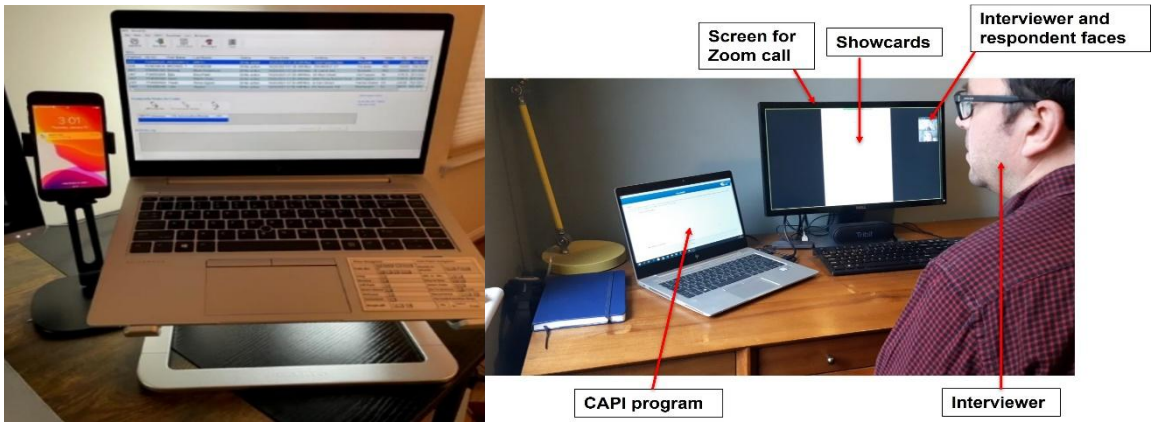
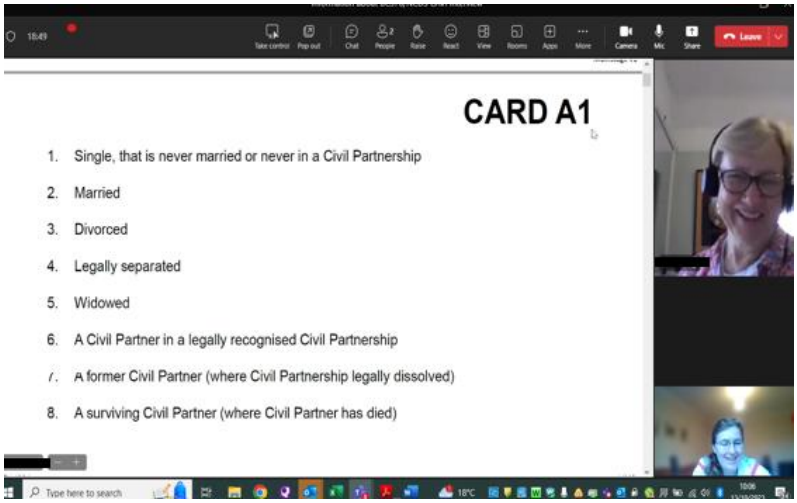


Figure 2

Example of a showcard displayed during a video interview from NCDS



Interviewers should be instructed to only keep windows open that are being used for the interview on the screen they are using for the video call (Irani, 2019) – i.e. the video platform window and any documents being shared in the interview. Having other windows or documents open may make navigation more challenging for interviewers and risk screen-sharing the wrong materials.

External cameras and good quality microphone headsets can also improve the quality of the video interview experience. The optimal setup will depend on the study and organisational context. If a specialist pool of interviewers is deployed to conduct a high volume of video interviews, then providing them with two devices, high quality cameras, microphones and

headsets would likely be a worthwhile investment. However, if video-interviewing is not envisaged to make up a substantial proportion of an interviewer's work, the one-device approach is likely to be adequate.

Interviewers should keep their camera switched on throughout the interview. The position of their camera is also important. The camera should typically be placed directly in front of the interviewer, to maximise eye contact. If two devices/screens are being used, the additional screen featuring the survey questions can be directly in front of the interviewer, so the respondent is always in their line of sight. In this way, the interviewer gives the impression that they are always looking at the respondent, which may lead to a better rapport between the two. Alternatively, the screen featuring the survey software could be placed to the side which results in the interviewer looking away from the respondent to read questions and then back to them when waiting for an answer – potentially replicating more closely the in-person interviewer-respondent dynamic (Schober et al, 2020). Interviewers should also consider their distance from the camera, aiming to be positioned so they appear neither too close nor too far away. The aim is to ensure they are clearly visible but without risking making the respondent feel uncomfortable.

8. Briefing and training for interviewers

Video interviewing is a new skill for interviewers to learn and requires different technical skills compared with in-person or telephone interviewing. As such, training for interviewers is required.

Video interviewer training should cover the following key areas:

- Technical skills needed to conduct a video interview including familiarisation with the chosen platform(s)
- Best practice when conducting a video interview
- Trouble shooting common issues which occur for the interviewer or respondent.

Technical Skills

Training needs to provide interviewers with the technical skills required to conduct a video interview using the chosen platform(s). This includes the key features of the platform(s) such as how to create a meeting and invite respondents to the interview (if the interviewer is responsible for this task), share sound and video, use the chat function and let respondents in from the waiting room.

Training must also cover how to use the equipment. If interviewers are required to use two screens (one for the video call and visual materials (if used) and the other for the survey software) then interviewers should be trained on how to set up and position the equipment so that eye contact with the respondent can be maintained when moving between devices (Centeno et al. 2024). If only one device is used, interviewers need to know how to toggle seamlessly between different windows to keep the interview running seamlessly and share the correct window (Sanchez et al. 2023).

Video interviewers may need to perform other IT tasks such as saving documents on their devices so they can then be shared with respondents during interviews or sending emails using templates. Some organisations that have used video interviewing found that at least some of their interviewers required training in these IT skills (Sanchez et al. 2023, Centeno et al, 2024).

Best practice when conducting a video interview

It is vital that video interviews are conducted with the same level of professionalism as in-person interviews. Expectations regarding dress, lighting, privacy, device positioning (as discussed in Chapter 7) must all be covered in training.

Training should cover how to build up a good rapport with the respondent in a video environment. At the start of an interview, it is recommended that interviewers introduce themselves and take a few moments to chat to the respondent to put them at ease. Interviewers should be encouraged to be sensitive to how their facial expressions might be perceived by the respondent and to concentrate on looking interested and engaged during the call. The Australian Social Research Centre, for example, briefed interviewers to wear ‘a

gentle smile', to 'appear attentive by glancing at the camera after reading a question', to have a 'good posture' and to 'try to avoid slouching' (Phillips et al. 2023). This kind of training may be especially important for interviewers typically used to conducting interviews by telephone who are not used to being seen on camera, but is something that in-person interviewers also need to consider as there will be a closer view of their face than in most in-person settings (Schober et al. 2020).

Interviewers should be provided with protocols to minimise data security risks. They should be briefed to keep respondent information confidential by conducting the interview in a private place (where the respondent cannot be seen or over-heard) and to take care when sharing their screen or sending messages that only content meant for that respondent is shared (Sanchez et al. 2023). Interviewers should also be briefed on safeguarding protocols, so they are clear what steps they need to follow if they are concerned that a respondent or another household member is in danger or at risk of harm (Schober et al. 2020).

Trouble shooting

'Trouble shooting' should be a key component of a video interviewing training programme (Schober et al. 2020, Sanchez et al. 2023 and Centeno et al. 2024). Video interviewers need to be able to solve technical problems that they or a respondent may encounter when joining or completing a video interview. This is especially important for interviewers who will be working remotely without the support of a supervisor/manager. Interviewers may need to help respondents access the video interviewing platform to join the survey and to fix common technical issues such as camera and microphone connections. There will inevitably be issues which the interviewer cannot resolve on their own so video interviewers will also require access to help and support. Studies using video interviewing have found that interviewers become better at handling technical issues with increased experience (Schober et al., 2020).

Structure/ organisation of the training

A key consideration when planning video interviewing training is the mode of delivery. In-person training makes it easier for the trainer to demonstrate technical skills and trouble shoot any issues occurring on the interviewer's own device. However, during the pandemic, many organisations successfully delivered video training remotely. For example, Westat successfully trained over 300 in-person interviewers in this way (Centeno et al. 2024). Remote training may be more convenient and cost-effective if interviewers are spread over a large geographical area.

Thought also needs to be given to the structure the training will take. Video interviewing is a new skill for most to learn so some organisations have split training into smaller modules over several days so trainees can best digest the information they need. For example, NatCen split training into two half-day sessions delivered on different days. The first session focused on foundation IT skills, key features of the video platform and tips on conducting the interview. The subsequent day's session built on this foundation and focused on the development of more technical and complex skills (Sanchez et al. 2023). Similarly, Westat, for the American National Election Studies (ANES), provided 12 hours of training which were

split into 4-hour blocks held over 3 days with several small group of trainees (Centeno et al. 2024).

Before interviewers begin work, it is important to ensure that they have mastered the required skills and feel confident to attempt their first live interview. Interviewers should be provided with plenty of opportunity to practice before starting work. Some organisations have carried out an accreditation system where the trainee conducts a virtual interview with an experienced video interviewer or trainer during which they are assessed to determine if they are ready to begin interviewing or require more training (Schober 2023, Sanchez 2023).

Given the different skills required for video interviewing compared to other modes and the importance of practice and experience to achieving a high-quality interaction, there are risks for surveys where interviewers are only occasionally required to complete a video interview. There may be a need for refresher briefings or for further support to be provided during the survey period.

9. Considerations for respondents

Device type

A key consideration is whether to allow respondents to participate using any internet-enabled device or to restrict this in some way. The main decision may be whether to allow respondents to use smartphones. A smaller screen may make it more difficult for the respondent to see/read visual materials such as showcards (Schober et al., 2020). Interviews may also feel more burdensome for respondents if using a small screen, especially for very long questionnaires. Most studies have allowed respondents to use any device of their choice – though sometimes suggesting use of a larger screen *if possible*. For example, a pilot for the English Longitudinal Study of Ageing (a cohort study of people aged 50+) found that respondents using smartphone struggled to read showcards and so advised them to use a larger device, where possible, for the main stage (Pathania, 2022).

There is much evidence that respondents can complete quite long video interviews on their phones without major issues. For example, 1 in 5 of those who took part in the National Child Development Survey and 1970 British Cohort Survey by video, did so using a smartphone. Interviews for these studies lasted around 80 minutes (Sanchez, 2023). Similarly, Hanson et al. (2025) reported that 24% of respondents interviewed by video on the hour-long European Social Survey used a smartphone and found no major difference in their 'interview experience' scores compared to those using larger-screen devices.

It is crucial that user testing is carried out with 'real respondents' using a range of devices. User testing should particularly focus on tasks beyond the basic video call function – e.g. screen-sharing materials (if relevant for the study). Materials such as showcards should be designed in a manner suitable for narrow/small screen devices. One potential benefit of viewing materials on touch-screen devices such as smartphones is that it is easier for respondents to zoom in and out (Wood et al., 2020). When carrying out user testing, respondents should be asked for their feedback on the interview experience – including any device-related issues – to inform any future improvements needed.

Preventing participants from taking part via smartphone will generally be unnecessarily limiting – participants may be used to making video calls on their smartphones and this familiarity may be helpful in boosting response. Importantly, many participants may not have access to other types of device.

Use of camera

The 'face-to-face' component of a video interview is seen a key advantage of this mode. This is particularly the case when it is combined with or replacing in-person interviews. To take advantage of the face-to-face functionality, both the interviewer and respondent's cameras should ideally be on throughout the interview. However, there may be cases when the respondent prefers to have their camera switched off for part or all of the interview. While this is not ideal, it is recommended that respondents should be allowed to participate with their camera switched off if this is their preference.

Interview length

There is some evidence that the duration of video interviews can be longer than administering the same survey in-person (Pathania et al., 2022; Arrue et al., 2023). However, it is unclear if this is due to technical issues with video (which may, for example, cause delays at the start of interviews) or if the question/answer process can sometimes take longer in a video context.

Most studies have found that respondents can complete long video interviews without major problems (Wood et al., 2020; Sanchez et al., 2023; Hanson et al., 2025). This may however vary from respondent-to-respondent and so it should be made clear they can stop for a break at any point in the interview.

It is important to be up front about the length of any survey interview. This may be especially true for video interviews where respondents will often be sent an invitation for a specific time slot. They may therefore be less able or willing to give time beyond this. It's recommended that calendar invitations are for the upper end of the expected interview length to prevent the risk of over-running (Wood et al., 2020).

10. Video interviewing and mode effects

Mode effects refer to differences in survey data that arise from the method of data collection rather than from genuine differences in the underlying constructs being measured. They are typically divided into two components: selection effects and measurement effects (Schouten, 2023). Selection effects occur when the mode of data collection influences who chooses to participate, while measurement effects arise when the mode affects how participants interpret or respond to questions.

There is now substantial evidence on the potential for mode effects between established data collection methods such as web, telephone, and face-to-face (De Leeuw & Hox, 2014) but as video interviewing is a relatively new approach the evidence on its potential impact on survey data remains limited.

In terms of selection effects, a relatively consistent finding is that respondents interviewed by video tend to have higher levels of education than those interviewed in other modes. In both the National Child Development Study Age 62 Survey and the 1970 British Cohort Study Age 51 Survey, participants interviewed by video were more likely to hold a degree compared with those interviewed in person (Durrant, 2024). Similar findings have been reported in several international studies (Conrad et al., 2023; Dulaney et al., 2023; Guggenheim & Howell, 2021; Fradier & Martin, 2023; Phillips et al., 2023). Video participants also tend to be younger than those interviewed in other modes (Dulaney et al., 2023; Fradier & Martin , 2023; Phillips et al., 2023; Thorolfsson et al., 2023). Evidence on gender bias is mixed; Dulaney et al. (2023) find no gender differences in video participation, Guggenheim and Howell (2021) find women more likely to participate via video while Fradier and Martin(2023) and Phillips et al. (2023) found the opposite. In both the National Child Development Study Age 62 Survey and the 1970 British Cohort Study Age 51 Survey there was no significant difference in video participation by gender (Durrant et al., 2024).

Video interviewing measurement effects have not been widely studied but findings so far suggest minimal differences between video and in-person modes. Using data from the European Social Survey, Hanson et al. (2025) found only minor differences in item non-response and response patterns across six countries and Zavala-Rojas et al. (2023) looked at two concepts measured in the European Social Survey and found generally consistent relationships between variables for video and in-person modes.

Experimental evidence is limited but generally consistent with these findings. Sun et al. (2021) found no significant differences between video and in-person interviews in disclosure of sensitive items or item non-response. Conrad et al. (2023) reported that video respondents showed lower non-differentiation and higher satisfaction than web respondents but were less likely to disclose sensitive information. Endres et al. (2023) compared web with video and in-person modes and found that video and in-person interviews closely aligned on most measurement quality indicators and concluded that video-collected data more closely resembles in-person data than web survey data.

Emerging UK evidence from forthcoming Survey Futures papers reinforces these conclusions. A study using data from the 1970 British Cohort Study shows minimal measurement differences between video and in-person interviews (Kocar et al., forthcoming). A second study using evidence from an experiment conducted by the Centre for Longitudinal Studies, in which participants were randomly assigned to web, video, or in-person modes, found that video interviews had very slightly lower levels of item non-response than in-person interviews and that measurement differences between the two interviewer-administered modes were minimal. However, significant differences were found between video and web responses, particularly on sensitive topics such as mental wellbeing and financial difficulties (Asensio et al., under review).

Taken together, the current evidence suggests that the risk of mode differences between video and in-person interviews is relatively minimal. As such, it is unlikely that questionnaires originally designed for in-person interviews will require substantial adaptation to be used for video interviews. However, some adjustments might be required for specific tasks or question types, such as those involving showcards or visual aids (see Chapter 10) or more complex tasks such as cognitive assessments (see Chapter 11).

Differences are more likely to arise when comparing data from video interviews with data from self-administered modes, such as web surveys. Given the close similarities between data collected via video and in-person interviews, survey practitioners designing mixed-mode studies involving web and video interviewing should follow existing guidance on minimising mode effects between in-person and web modes e.g. D'Ardenne et al., 2025.

New studies introducing the video mode are encouraged to empirically assess the potential for mode effects to further build the emerging evidence base. As with all mixed-mode surveys, analysts using data collected by video alongside other modes should remain mindful of potential mode-related differences when interpreting and analysing results.

11. Use of visual prompt materials in video interviews

One of the key advantages of video interviews is the ability to share visual materials in real time, even when interviewing remotely (Jeannis et al., 2013). These visual prompts can take various forms, with showcards being the most common. However, interviewers may also need to share other types of content, such as videos, audio clips, leaflets, or documents.

Studies have taken two broad approaches to sharing visual material: (A) Sharing the interviewers survey software directly or (B) sharing separate files, such as a PDF of showcards. The table below shows some potential pros and cons of the two approaches.

Table 2: Pros and cons of sharing the video programme vs sharing separate files

Approach	Pros	Cons
Option A: share interview programme	• More comparable with a web interview format (which may be advantageous if video interviews being conducted in a mixed mode setting in which a large proportion of interviews obtained via web) • Faster to administer as respondent may read ahead and respond more quickly • Easier for the interviewer to ensure the respondent is seeing the relevant screen (they don't need to navigate through another document to find the correct show card). • Allows for real-time display or verification of respondent-specific information, such as contact details. • Technically simpler for interviewers, with less need to switch between windows or screens. • Facilitates sharing of integrated content from the questionnaire program, such as audio or video clips.	• May reduce respondent engagement if the questionnaire is shared for extended periods, shifting focus away from the interaction with the interviewer • Unprompted response options (e.g. "don't know" or "refuse") must be hidden from view, requiring additional programming. • Interviewer instructions need adapting as they are visible to the respondent. • Interviewers must switch windows or screens to display external materials (e.g. a leaflet), unless these are embedded within the interview program.

Option B: share separate files	• Comparable with in-person interviews using physical show cards • Text size, font, and formatting can be tailored to suit the respondent's needs. • Interviewers can easily zoom in on the document to improve readability. • Allows collection of unprompted responses (e.g., "don't know" and "refusals") without displaying them to the respondent • Interviewer instructions are not visible to respondents • Fosters greater interaction between interviewer and respondent	• More technically demanding for interviewers to navigate the interview program and share showcards when required • Interviewers have to ensure the correct showcard (or visual material) is displayed to the respondent • There can be a time lag while switching screen sharing on and off

Most studies have taken the approach of only sharing visual material as and when require. This approach capitalises on the face-to-face interaction between interviewer and respondents and as such is generally the approach we would recommend. If this approach is adopted the following recommendations should be considered:

- Minimise the number of different materials or files to share - for example, combine all visual content like showcards and leaflets into a single PDF that can be shared as needed.
- Minimise the number of times interviewers need to switch screen-sharing on and off. Consider grouping all questions involving visual materials into a dedicated segment of the interview.
- Plan the sequence of showcards carefully to help interviewers navigate easily. Skipping through multiple cards can be challenging, especially with complex routing.
- Ensure visual materials are readable across different devices. Some studies (Wood et al., 2020; Steiger et al., 2022) have reported issues with text not displaying properly, while others (Phillips et al., 2023) recommend using high-contrast black-and-white designs to improve visibility.
- Check that the interviewer can zoom in on a screen if necessary (Wood et al 2020).
- Provide thorough training so interviewers are confident with sharing and switching screens, along with clear troubleshooting guidance and support contacts (Centeno et al., 2024.

- Where respondents have access to different devices, encourage them to use laptops, desktops, or tablets, especially for surveys that require extensive on-screen materials rather than smartphones.

12. Use of non-standard/complex tasks in video interviews

In survey interviews, traditional question and answer formats are being increasingly supplemented by 'non-standard tasks' to maximise both the type of information collected and its reliability. In this chapter, we discuss some of the more common complex elements administered within social surveys and how these have been implemented in video interviews.

The non-standard/complex tasks we cover are:

- Self-completion elements – where the respondent completes a part of a questionnaire, generally involving more sensitive questions, on their own.
- Cognitive assessments – asking participants to complete tests which measure different aspects of cognitive function such as memory or concentration.
- Data linkage consent – asking respondents for their permission to link their survey responses to other data sets such as health records.
- Issue and return of paper documents – for example, asking participants to complete supplementary paper questionnaires

Self-completion elements

In many large-scale social surveys conducted in-person, sensitive questions are administered through a self-completion module. This often involves handing the interviewer's laptop to the respondent, allowing them to answer privately so that the interviewer does not see their responses. When adapting this approach for video interviews, careful consideration is needed to preserve respondent privacy while maintaining data quality and response rates.

A recommended method is to administer the self-completion section as a short web survey, ideally completed during the video interview. A unique survey link can be shared with the participant using the chat function of the video conferencing platform. Completing the questions in real time maximises the likelihood of response and aligns closely with how self-completion modules are often used during in-person interviews.

If a respondent is unable or unwilling to complete the web survey during the call, an alternative is for the interviewer to share their screen. The respondent can then read the questions privately and relay their answers by selecting a response number (e.g., 1–5), which avoids the need to speak sensitive information aloud, particularly useful if privacy cannot be ensured in the respondent's environment.

Another option is to send the web survey link after the interview for the respondent to complete later.

Interviewer-assisted methods, such as screen sharing, may increase response but reduce privacy and potentially introduce social desirability bias (Sanchez et al., 2023). Conversely, post-interview completion preserves privacy but carries a greater risk of nonresponse. The choice of method should balance the goals of data completeness and respondent comfort, informed by the sensitivity of the questions and the context of the interview.

Cognitive assessments

Cognitive assessments are a key element of many longitudinal studies, including the National Child Development Study (NCDS), the 1970 British Cohort Study (BCS70), and the English Longitudinal Study of Ageing (ELSA). Many of these assessments were originally designed for in-person administration and are either unsuitable for web or telephone modes or subject to significant mode effects when adapted. However, these studies have shown that cognitive assessments can be effectively administered via video interview, and emerging evidence suggests that measurement differences between video and in-person modes are minimal (Kocar et al., forthcoming). Video interviewing offers several important advantages over both telephone and web-based modes:

- Visual monitoring: Interviewers can observe respondents during the assessment, helping to ensure standardised administration and detect issues such as the use of external aids or the presence of other people in the room.
- Support and engagement: Interviewers can provide real-time guidance and encouragement, which can help respondents remain focused and complete more cognitively demanding tasks.
- Presentation of materials: Visual and auditory stimuli, such as showcards, images, or sound files can be presented seamlessly via screen sharing, enabling a wider range of cognitive assessments to be administered compared to telephone interviews.
- Greater control: Unlike self-administered web surveys, video interviews allow interviewers to pace the session, clarify instructions, and respond to any confusion or technical issues, improving data quality and participant experience.

With appropriate preparation such as interviewer training, technological support, and careful adaptation of assessment materials, video interviewing can be a robust and flexible method for conducting cognitive assessments remotely.

Data linkage consents

Many studies seek participants' consent to link their survey data to administrative records, such as health, education, or economic data. While this is an important aspect of data collection, consent rates can vary significantly by mode. In particular, web surveys often yield lower levels of consent, likely due to the absence of interviewer explanation or reassurance (Thornby et al., 2018; Peycheva et al., 2023: Jäckle et al., 2021). Evidence from studies such as NCDS, BCS70, and ELSA shows that video interviewing can achieve consent rates comparable to those obtained in face-to-face interviews (Durrant et al., 2024).

In a video interview, interviewers can present information about data linkage, such as explanatory leaflets and videos, by sharing their screen, ensuring respondents receive the same information and support they would in an in-person setting. While the use of paper consent forms is generally impractical in video interviews, most studies now collect electronic consent. This typically involves obtaining verbal consent, with the interviewer recording the respondent's choices directly in the CAPI programme. After the interview,

respondents can be sent a summary of their consent decisions, by email or post, providing a record for future reference or in case they wish to revise their choices.

13. Information to collect

A range of additional information may be collected from video interviews to ensure high quality of the resulting data and to inform and improve the approach for the future. This can be done via interview assessment and experience questions and via so-called paradata (i.e. process data) that describe the survey data collection process. In this chapter, we describe both.

Interview assessment/experience questions

Many surveys used video interviewing for the first time during the COVID-19 pandemic. This led to approaches being quickly developed and tested. Since this was a relatively new method for survey data collection, there was a need to collate feedback on the experience and process of video interviewing from both interviewers and respondents. Such feedback has been collected in different ways:

1. Feedback questions included at the end of the questionnaire for respondents and/or interviewers.
2. A post-interview debrief questionnaire or feedback form for respondents.
3. An interviewer feedback form.
4. Qualitative debriefs or focus groups with interviewers.

Some form of feedback will almost always be useful – especially if collected at a pilot phase where findings can inform main stage preparations and processes. However, which approach to collecting feedback is most suitable will depend on the nature of studies that use video interviewing. If, for example, video interviewing is being newly introduced for an organisation, it would be advisable to collate more extensive feedback (options 2-4) through a piloting phase. This may also apply for studies that are expected to pose challenges for the video method (e.g. tasks beyond the standard question/answer process – see Chapter 12). If, however, video interviewing is more established or the interviewing process is more straightforward, there may only be a need for a few basic 'experience' questions at the end of the interview (option 1). There is also a choice of whether feedback is needed at an interview level (options 1 and 2) or interviewer level (options 3 and 4).

Many different feedback questions have been included across studies, with the level of detail partly linked to the feedback method used. However, there are a core set of questions that have been asked (in one way or another) across several studies. These are included below and may be a good starting point for organisations/studies seeking to collect feedback on the experience of video interviewing.

1. Overall question(s) on the experience of the interview – e.g. rating of the interview experience or satisfaction with the interview.
2. The experience of joining the video call – e.g. issues/delays, help needed.
3. Experience of technical issues during the video call – ideally broken down by different types of issues (audio, display, etc).
4. Use of visual materials (e.g. showcards) and any problems experienced.

5. Type of device used by the respondent (and interviewer, where relevant).
6. How comfortable respondents were in answering questions by video (especially in cases where sensitive questions are included).
7. Likelihood for respondent to complete a video interview again if asked in the future.
8. Where relevant, a comparison between modes. For example, for longitudinal studies where respondents have participated in different modes, they could be asked to compare the interview experience between modes and state a future preference. For mixed-mode studies, some of the same 'experience' questions could be asked for different modes, to see how experiences compare.

Where relevant, it is generally advisable to collect similar feedback from both respondents and interviewers as each group will provide different and useful perspectives. For example, interviewers can be asked how easy they found it to screen-share and navigate between materials, and respondents can be asked how well they could read the materials when presented on their screen.

Paradata from video interviews

It is also advisable to consider what paradata should be collected to inform and assess the video interviewing experience. What should be collected will depend both on the nature and objectives of different studies and the level of information video platforms can provide. At a minimum, it is advised to collect the start and end time of the video call, as well as timestamps from the questionnaire programme. This will allow for a clearer understanding of the implications for interview length of using video mode, especially when comparisons can be made to other modes.

Other paradata that may be considered useful for some studies include whether interviewer and respondent videos are on/off at different points in the interview, whether materials are being screen shared, information on the contact/recruitment process, and information on the interviewer (e.g. their level of experience).

Recordings of video interviews can provide rich data to allow further analysis (e.g. regarding interviewer-respondent interactions (Sun et al., 2025, under review). However, before deciding to record interviews, consideration should be given to how they will be used, stored and what methods may be used for analysis. Respondents will also need to give their consent for interviews to be recorded.

The specific requirements should be considered and agreed for each study, ensuring that respondents are made aware (and give consent, where relevant) to the information being collected. For a typology and a comprehensive review of the existing literature on paradata from video interviewing, please see Kocar et al. (2025, under review). The paper outlines the different paradata that exists for video interviewing and provides examples of how this paradata can be used.

14. Costs and benefits of carrying out video interviews

The decision over whether to offer video interviewing as a survey mode is dependent on several factors. This will partly reflect the level of expected demand to participate by video compared with participating in other ways, and cost-benefit trade-offs around this. In simple terms, would the number of people who would participate by video be sufficient to the extent that the benefits of this mode outweigh the costs?

The impact on total survey costs of implementing video interviewing depends on the mix of modes and how those modes are sequenced and prioritised (Hupp et al., 2025). In the sections below, we look at different potential uses of video interviewing in this context.

Web self-completion versus video interviewing

If web self-completion is a viable remote mode (given the measures the survey is carrying / risks of mode effects), this is very likely to be considerably more cost-effective than video interviewing per interview due to not requiring an interviewer to set up and deliver the interview (and set-up costs for the mode are also likely to be lower).

Additionally, video is likely to be more costly than web self-completion as the first mode ahead of in-person in a sequential design due to likely lower response rates for video: both are online methods that have similar accessibility limitations, but the barriers to / steps towards participation are (currently) higher for video. It is therefore likely that video will produce a lower response rate as an initial mode and more cases will move forward to the more expensive in-person mode.

Video alongside in-person interviewing

Compared to in-person interviewing, video interviewing presents opportunities to reduce marginal interviewing costs. This is in two respects:

- Eliminated / reduced travel costs for interviewers who do not need to visit the sampled address / need to visit fewer times (time travelling, travel expenses). Where telephone numbers are available for sample members ahead of fieldwork this offers the opportunity for interviewers to contact and arrange video interviews without any visit being required, maximising savings.
- Where interviewers are centrally organised, such as within a Telephone Unit, a smaller pool of interviewers is required to cover a given number of cases, leading to lower training and ongoing management costs. The most efficient operation is achieved where telephone numbers are available such that a large set of cases can be worked by this separate team from the outset of fieldwork (rather than cases being handed back to the specialist team by interviewers in the field). In this respect, costs can be similar to those for a CATI operation.

Savings are offset by the additional (largely) fixed costs of implementation of video alongside other modes. These can vary considerably depending on the wider survey's complexity and

the extent of development work aimed at the video mode. Additional costs incurred due to this additional mode will include:

- Additional training for field interviewers where this is the model of delivery.
- Alternatively, separate training of video interview specialists (fewer interviewers are likely to be required).
- Adaptation of instruments and protocols compared with in-person interviewing.
- Costs associated with the management of a more complex fieldwork approach.
- Potential additional costs in data management (depending on the instrument design and data collection software).
- Development and pretesting phases to establish the platform to be used, integrate the modes, develop training and minimise mode differences. The extent of effort here will vary widely between surveys.

Given these fixed and variable costs, the extent of any savings for the total survey will depend on its scale and the implementation of the video element (Hupp et al., 2025). Lower total costs are more likely to be realised where:

- Video is implemented at a large scale as the first mode in a sequenced design ahead of in-person visits for non-responding sample members (i.e. where telephone numbers are available for sample members in longitudinal surveys). This maximises the savings generated by lower per-interview costs.
- This is organised within a centralised approach, such as within a Telephone Unit, where specialist call scheduling and shift management can be utilised. Efficiency savings can be generated per interview in this way.

The above conditions applied for ELSA, NCDS and BCS70 as implemented by NatCen in the UK, where hundreds of interviews were achieved by video rather than in-person at a point when an in-person interviewing was not available. The marginal cost per interview savings were sufficient to more than offset the fixed costs of set-up.

However, this is not the experience of all surveys that have implemented video interviewing. For example, the Medical Expenditure Panel Survey in the US found that the marginal per interview savings realised with video compared to in-person interviewing were minimal due to the interviewer still needing to visit addresses to set up video calls. This did not offset the substantial investment in setting up the video interviewing platform (Centeno et al, 2024).

15. Inclusivity

There may be cases where it is not suitable to roll video interviewing out on a large scale (e.g. as it's not seen as a cost-efficient option). However, it may still have the potential to allow the participation of some groups who may be less able or willing to take part in other ways (Schober et al., 2023). Some target respondents may be uncomfortable with having strangers in their home or need to shield for health reasons. As such, they may be more likely to participate in a video interview than an in-person interview carried out in their home. Others may find it difficult to take part in a self-administered survey (e.g. due to low literacy) and find it easier to participate via a video interview when questions are read out to them. There may also be people who are harder to reach in person – for example, being based overseas (but still deemed eligible for a survey) or living in a very sparsely populated, remote or inaccessible region.

There may be cases where video interviewing is not rolled out on a large-scale basis for a study but made available on an opt-in basis. This could be achieved with an instruction in an advance/invitation letter that allows target respondents to contact the agency if they would prefer to be interviewed by video. Even if there is relatively little demand, this can help in making surveys more inclusive and accessible.

For example, in a mixed mode study where video is combined with in-person interviewing, these small-scale video interviews could potentially be used to allow the interview to be conducted using sign language or in another language. Being able to conduct the interview remotely would mean only a small number of video interviewers with the relevant skills would be needed to conduct interviews in this way in response to requests. Of course, there would still be other costs involved in terms of translation, quality checks etc. which might make it prohibitive in some cases, but a video approach may offer potential for greater inclusiveness beyond what might be possible based on an in-person approach.

Related to the above discussion, it is important that video platforms support universal use – for example, enabling closed-captioning and setting up the interviewer's camera to support lip-reading (Schober et al., 2020). These features should be assessed when planning surveys and deciding which platform to use. Such features will be especially important for surveys among populations that may have greater accessibility needs.

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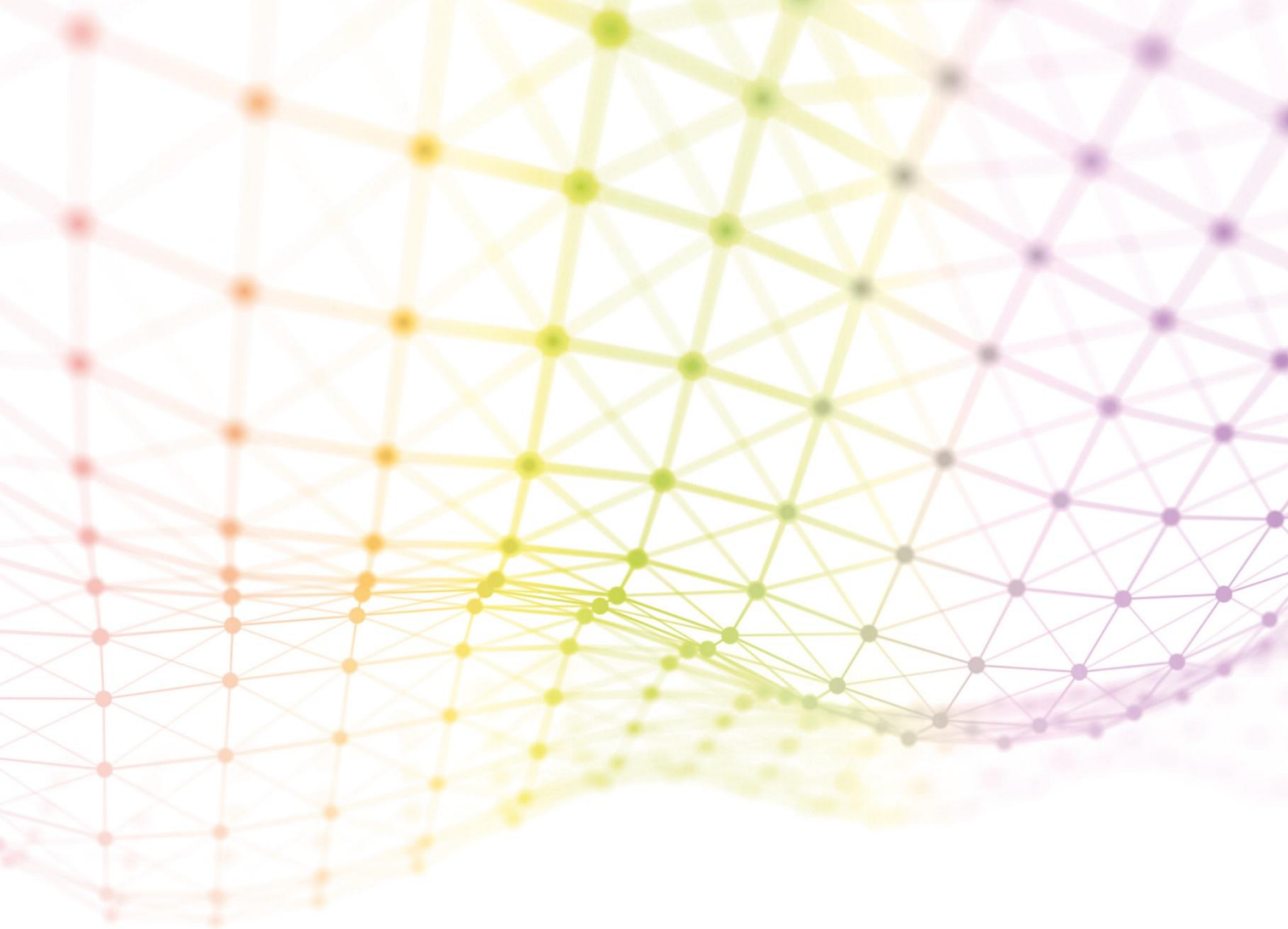

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