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In-person Survey Data Collectors: Looking to the Future

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Abstract

In-person data collection is critical for the success of many large government-sponsored surveys. Despite response rate declines and increasing costs, the mode remains the gold standard for meeting the most rigorous survey requirements for federal survey programs, particularly as part of a multimode data collection strategy (Schober, 2018). However, over the last ten years critical labor market and workforce changes, exacerbated by the pandemic, have made in-person data collection efforts prohibitive for all but the largest survey organizations. Shifting ideas about job flexibility and job satisfaction alongside the increasingly technical role and demanding nature of the job have impacted recruitment and retention for survey organizations across the U.S. and Europe (Charman et al., 2024). Trends in U.S. field data collector employment are summarized and it is outlined that there are promising practices in recruiting and retaining high quality field data collectors. Additionally, broader ways to structure the field data collector labor force for continued success are considered, including supplementing field data collection with multimode alternatives such as video interviewing and updating value propositions for respondents.

Key Words: Survey data collection; In-person interviewing; Survey labor; Survey costs; Interviewer training.

1. Introduction

Despite response rate declines and increasing costs, in-person interviewing is still widely considered the gold standard of data collection for household-based survey research (Schober, 2018), even as it becomes increasingly part of a multimode protocol rather than a standalone survey mode. Through interpersonal interactions, field data collectors (FDCs) obtain data that maximizes response rates when compared with self-administered online or mail surveys (Daikeler et al., 2020; Davies et al., 2020; Neuman, 2012). The in-person mode can also be especially useful for engaging hard-to-reach survey populations or for particularly complex surveys (Lynn, 2020). However, recruitment and retention of FDCs has become increasingly challenging, driven by changes in workforce demographics and worker expectations coupled with technological advances that have changed where and how people work (Dubina, et al., 2021; Ray & Pana-Cryan, 2021; Rogers & Wilder, 2020). The Covid-19 pandemic intensified these trends. Survey organizations over the world have struggled to maintain consistency and predictability since the pandemic in a training and data collection environment where job flexibility is commonplace. To develop a viable path forward for the crucial role FDCs play, we evaluate current trends in the FDC labor force, with a focus on recruitment and retention challenges in household-based survey projects. Through administrative data analysis, interviews with Westat staff, surveys of exiting and current FDCs, discussions with other survey organizations in North America and Europe, and a review of existing literature, we identify recommendations to improve efficiency in recruitment and retention of FDCs.

2. Understanding Labor Market Challenges

Over the last decade, labor economists have highlighted several growing shifts in the US labor market, with rapid changes in these shifts throughout the Covid-19 pandemic. Survey research trends have impacted the uniqueness of the FDC position, the technical skills required, and the lead time for interviewer recruitment. Alignment of skills, job interests and satisfaction, and technological advancements have altered the way American workers think about how

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and where work gets done. US labor force demographics have shifted toward a smaller, older workforce. In short, current labor force trends have negatively impacted the competitiveness and desirability of the FDC position.

2.1 Uniqueness of the Field Data Collector Position

The field data collector position combines attributes of gig work with the responsibilities of a professional vocation, filling a unique niche in the labor market. FDCs in research organizations across the country provide critical data collection skills, visiting potential respondents at their homes and establishments, and gaining access to valuable population data. FDCs spend their time managing cases, following up with potential respondents, and conducting interviews. This unique work requires strong public-facing skills, technical skills, and confidence and motivation to work independently. While this work is flexible to an extent, schedules are often dictated by a project's target sample (e.g. nighttime and weekend work to reach a working age sample; daytime work to reach an older sample.) Beyond specific job skills and requirements, FDC positions are typically part time and limited term. Most FDCs are expected to work 20-25 hours per week during data collection, though this varies, with more work early in a field period. Many FDCs work on multiple projects, either within or across organizations, to provide consistent work.

Finding people who meet these requirements poses a key challenge for survey operations. The FDC position shares traits and requirements with other part-time jobs, particularly home health care and gig work (such as deliveries, ridesharing, and event staffing). However, the part-time limited-term nature of the work, combined with required technical and soft skills to collect data are unlike any other position. Home health and gig work provide services directly to consumers; FDC work requires forging connections that lead to participation.

2.2 Shifting Labor Market Skills and Interests

2.2.1 Misalignment of Skills for Available Positions

Across the labor market, skills and available jobs are misaligned, contributing to employer difficulties in finding new workers (Henderson, 2021; Maurer, 2021). A national survey found that 30% of unemployed respondents believe their skills do not match available jobs, while 60% of employers surveyed indicated that applicants lack the necessary skills for available positions (Maurer, 2021). The decline in public-facing retail positions may make it more difficult to find workers with experience in gaining cooperation, a skill critical to addressing respondent concerns about privacy, confidentiality, and trust in government and science. As Americans shift to online buying platforms, fewer workers are in public-facing sales roles – even fewer jobs require “cold-call” in-home recruitment efforts. This makes it more difficult for survey organizations to pull these skills from elsewhere in the labor pool.

2.2.2 Shifts in Job Satisfaction and Interests

The pandemic sparked a broad question of interest misalignment in the labor force. Unemployed workers were increasingly unwilling to return to prior jobs for the same pay and hours (Kaplan et al., 2021). Employed workers considered different options, leading to the highest quit rates since the Bureau of Labor Statistics began calculating that figure. The shift in job satisfaction was especially challenging for part-time heavy industries (Janicki, 2024). To retool, many retailers converted temporary positions to permanent ones and reduced the length of the hiring process to recruit more effectively (Gurchiek, 2021). As other industries offer more flexibility and job security with less public interfacing, the flexible work hours and independence offered by the FDC position may have become less valuable. Additionally, limited growth opportunities e.g. supervisory positions, and greater competition for job flexibility have made FDC recruitment more challenging.

2.2.3 Increasingly Technical Landscape

Technological advances have catalyzed a seismic shift in where and how work is done throughout the U.S. with important implications for recruitment and retention in the FDC position. Technological advances have shifted perceptions and expectations of job flexibility. The pandemic was a boon for job flexibility, as working from home became the norm for many professional positions (Howe et al., 2021). Technological advances have created an increasingly technical landscape for FDCs. In-person survey efforts have increasingly relied upon integrated

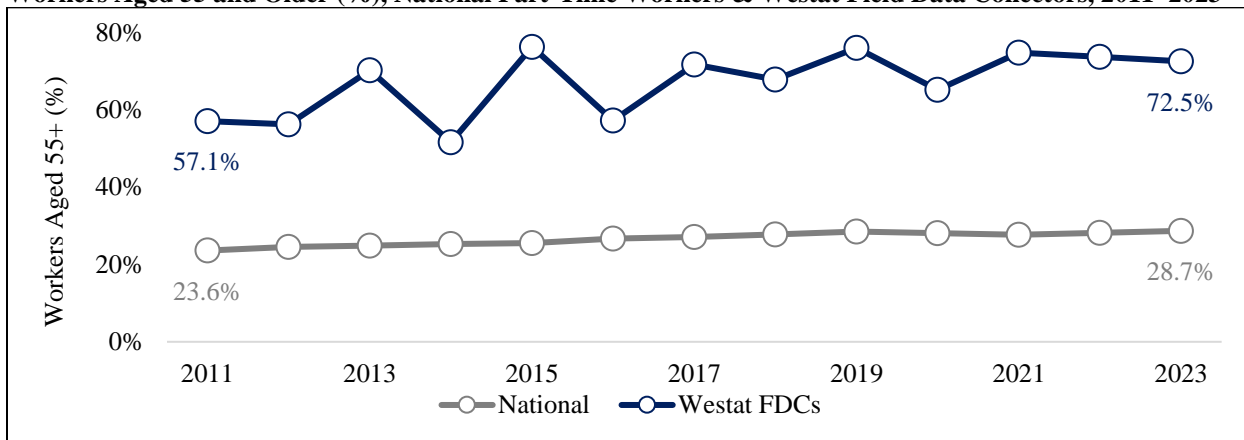
technology systems to track many aspects of survey completion, from sampling to interview completion (Olson & Wagner, 2015; Edwards, et al., 2017). Moreover, field surveys increasingly employ technical hardware and software tools to collect physical metrics and biospecimens from respondents. The shifting technological needs of the FDC position can be overwhelming, particularly for older workers, and can be difficult for hiring managers to determine and define in the job requirements.

2.3 Contracting, Aging Workforce

Two key demographic shifts pose challenges for FDC recruitment and retention. First, growth of the US working age population has slowed (Dubina, et al., 2021; Rogers & Wilder, 2020). This was long anticipated with the baby boomer generation’s exit and a declining birth rate. However, the pandemic caused a steeper than expected decline in workforce participation, leaving fewer workers to fill available positions (Gregory & Steinberg 2022).

Additionally, the working age population is becoming increasingly older. As jobs shift toward knowledge-based positions, workers over the age of 65 stay in the workforce longer (Dubina, et al., 2021). Increases to the Social Security age and Great Recession-era wage freezes have also contributed to greater workforce participation rates among older workers, both for full-time and part-time workers (Butrica, et al. 2011). Figure 1 illustrates the steady increase in the proportion of national part-time workers aged 55 and older (from 24% in 2011 to 29% in 2023). Aging of the working age population slowed during the pandemic as older, part-time, public-facing workers chose to retire early (Morrissey, 2023), but had resumed its upward trend by 2023. As the working age population becomes older, it may be more challenging to find workers with the technical skills and physicality to meet job requirements.

Figure 2.3-1.
Workers Aged 55 and Older (%), National Part-Time Workers & Westat Field Data Collectors, 2011–2023



Notes: National data come from the Labor Force Statistics from the Current Population Survey, 2011–2023, Table 8. “Employed and unemployed full- and part-time workers by age, sex, race, and Hispanic or Latino ethnicity.” All demographics are calculated as a proportion of staff with at least one recorded hour of work time in the reported year with records for age.

Westat’s household-based FDC labor force mirrored national trends, though with a significantly larger share of older workers (Figure 1). From 2021 to 2023, roughly three-quarters of Westat’s household-based field labor force was aged 55 and older (55+) – about three times greater than the proportion of workers aged 55+ among national part-time workers. As with national trends, the proportion of FDCs aged 55+ decreased in 2020, but has since rebounded.

3. Responding to Field Labor Challenges

Understanding changes in the FDC labor market is critical to the future of in-person data collection. Westat has invested in understanding how to better position field data collector recruitment and retention efforts for future success. Below we outline approaches and considerations for improving recruitment of FDCs and shifting how survey

organizations leverage in-person data collection staff. We also consider ways to alleviate the weight on field data collection, including supplementing it with multimode alternatives and updating value propositions for respondents.

3.1 Improve Recruitment

In recent years, survey organizations have struggled to meet data collector recruitment goals. Greater challenges in FDC recruitment threaten not only project cost and timelines, but long-term data quality. We highlight several approaches Westat has taken to improve recruitment challenges.

Survey organizations often hire FDCs months in advance to ensure appropriate staffing at the beginning of a project. However, most part-time workers look for jobs that start within days, not weeks or months. Average time-to-hire in 2021 for industries with high proportions of part-time workers was just over a month (36 days). In contrast, average time-to-hire for Westat FDCs was more than six months. The gap in this metric between Westat and other part-time heavy employers increased over time. From 2014 to 2021, the average number of days from application to training date for new Westat FDCs nearly doubled from 92 days to 177 days, an increase of 92%, compared with a 44% increase for the largely part-time leisure and hospitality, and retail trade fields. To reduce the hiring timeline, Westat has moved to a rolling recruitment and training approach on some projects to get FDCs started more quickly and reduce pre-training attrition.

Some areas of the U.S. pose greater hiring challenges than others. To better understand these challenges, some Westat projects identify difficult to hire areas early in the recruitment process. These sampling areas get specialized recruitment approaches, including hiring local recruiters, creating localized advertising, and reaching out to special locations such as military bases and colleges. Additionally, Westat has done extensive cost-benefit analysis on traveling FDCs into difficult hiring areas. In some circumstances, it is more cost effective to travel a successful FDC into a difficult-to-hire area (Brick et al, 2024).

Although Westat has reduced the hiring timeline significantly, any lag between hiring date and the beginning of work with a formal training program increases the likelihood that the candidate will find another job. One of Westat's largest projects has expanded training to include early opportunities for new staff to get paid prior to formal training, including learning project background and meetings with supervisors and experienced FDCs to discuss job expectations.

Westat, like other firms in the U.S. and Europe, is investigating ways to help professionalize the role, including recruiting interviewers as full-time employees with salary and benefits, rather than hourly with more limited benefits. While early efforts in this direction have been discouraging, it still may prove to be a fruitful way to attract and retain people who are successful in this difficult role.

3.2 Augment In-Person Data Collection

From 2020 through 2022, some of Westat's largest projects fell as much as 50% short of recruiting goals, and experienced attrition rates for newer interviews as high as 50%. Labor market conditions have become slightly more favorable since then. By implementing these recommendations and redesigning surveys to be less dependent on high levels of field interviewer labor, in 2024 we were able to retain 83% of interviewers with less than 2 years tenure. These shifts and the effects on recruiting and retaining qualified field staff have led us to rethink the role of the in-person data collector, following two guiding principles.

First, we must meet respondents where they are. This is not only a physical issue, but we must engage respondents using the means and techniques best suited to gaining cooperation and collecting high-quality data. One key is to staff and equip our field data collectors with materials and strategies that are tailored to individual respondents. The propensity, for instance, of a multigenerational household with several children to respond to a lengthy interview may be completely different from an elderly person living alone. There may be significant issues around language, or around the use of technology now prevalent in surveys. Some respondents may be challenged by their political attitude toward the federal government, while others may fear anything associated with federal data collection. We need to be responsive to respondent needs as well as survey needs and look for a place of intersection. On a longitudinal survey this is amplified after the first round, because so much more is known about the household, which allows more specific tailoring of subsequent approaches.

Second, the challenging nature of data collection after the pandemic brings into sharp focus the value of the FDC: we recognize that the most expensive and scarcest resource in field survey data collection today is an experienced, well-trained interviewer. The question then becomes: what is the most effective and efficient way to maximize the impact and return on investment from this valuable resource? We are increasingly valuing the ability to gain cooperation over the ability to administer an interview. We are identifying the key skills as early as possible and assigning our most successful interviewers to our most challenging cases. And we are identifying cases of the highest value to the quality of the outcomes, such as increased coverage and reduced bias, and putting those cases in the hands of our most talented data collectors. We are looking to reduce the time and effort that FDCs spend on straightforward data collection, which could be accomplished via video, phone or web. We can use other modes to collect the data, once the FDC has established cooperation with the respondent.

3.3 Rethink Multimode

The use of multimode approaches to contacting and data collection is now standard practice on most established surveys that were initially conceived as in person. In many cases, contact mode is managed “on the ground” as part of field management, relying on the judgement of field interviewers and managers to determine the contact mode (and other details, such as day and time) most likely to yield cooperation for specific cases.

In early multimode data collection, the mode was often assigned a priori by the home office, and switching modes generally involved moving cases from one platform to another, with decisions made centrally at the home office. Under these initial efforts, multimode could mean using multiple versions of the survey, with each mode having an independent management system, hierarchy of data collectors, supervisors and quality control staff, and possibly a separately programmed questionnaire. Often these modes resided in different parts of the organization, such as an independent telephone center, field office, or web programming group. However, as the cost of data collection continues to increase while the general propensity to respond goes down, we are becoming nimble in deciding whether, how and when to change modes. We have removed many of the barriers to mode changes, such as cumbersome and time-consuming mode reassignments from the home office. Instead, we are moving to more sophisticated, real-time tools for determining the best mode, i.e., most likely to yield a complete, and developing integrated field management systems and operations that can react immediately.

A related development is that the decision about the best mode of data collection now increasingly rests with the respondent. This ties back to the core principle of meeting respondents where they are. Under this approach, the interviewer works with the respondent to select the mode that works best for the respondent to cooperate. Supported by technology – including, for instance, contact analysis – interviewers increasingly become “mode managers,” negotiating the best way forward for the respondent. A core development is the rise of video interviewing during and after the pandemic, providing interviewers a new mode. The option to provide data by video instead of in-person appeals to many respondents and helps gain cooperation (Centeno, et al., 2024).

3.4 Provide Support, Differentiate Roles

Our experience has led us to specific actions for retaining qualified field staff. While recruitment is crucial, retaining staff throughout the project lifecycle is equally important. Solving the retention problem significantly aids recruitment efforts. For ongoing projects, experience is invaluable. When an interviewer leaves, we lose our substantial investment in hiring, training, and developing that person’s skills. Therefore, it is vital to implement strategies that enhance retention. Acknowledging accomplishments, even small recognition, can foster a sense of belonging. Managers can celebrate milestones, achievements, and exceptional performance by sending handwritten thank you cards, thoughtful emails, lapel pins, or electronic badges when FDCs log onto their homepage. These gestures can make a data collector feel appreciated. Training doesn’t stop after the initial phase. Ongoing mentoring continues to improve interviewer skills and knowledge, builds relationships with home office staff, senior management, and other interviewers, and helps the interviewer feel part of a larger community with purpose. Establishing regular feedback mechanisms, such as surveys and one-on-one meetings, can help managers understand the needs and concerns of data collectors. Actively addressing this feedback can improve the FDC’s work experience and retention.

While pay is important, it is rarely identified by FDCs as the primary reason for leaving. We ensure that interviewers can work successfully and be paid appropriately. We identify different roles and adjust pay structures to recognize

unique talents: travelers, video interviewing, refusal conversion, language skills. We now routinely implement interviewer bonus programs for completing interviews, converting refusals, or working for a specific time. As project caseloads rise and fall at different times, we actively share field staff across projects. This benefits both the employee and the company, providing a more consistent workflow for employees and sharing experienced staff across projects. This approach is particularly beneficial and cost-effective for smaller projects that only need a few data collectors. In summary, retaining qualified field staff requires a multifaceted approach that includes appreciation, ongoing mentoring, quality pay structures, and strategic staff sharing across projects. By implementing these strategies, we can ensure a stable and experienced workforce, ultimately enhancing project success.

4. Conclusion

To meet rising challenges, we provide practical steps to ameliorate the mounting recruitment and retention issues facing the FDC labor force. The recommendations include several avenues for future research and consideration to further advance this work, including evaluating best practices around recruiting timelines, finding efficient ways to measure attrition costs to understand potential cost savings, and refining and expanding data on the FDC labor force.

These recommendations represent a coordinated effort to meet current recruitment and retention challenges. As we think more broadly about structuring the FDC labor force for success, we should also consider ways to alleviate the weight on field data collection including supplementing field data collection with multimode alternatives and creating updated value propositions for respondents. Ongoing discussion, evaluation, and recalibration will be critical to meeting current project needs amidst an uncertain and ever-changing labor market.

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