nVision guide for interviewers

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Introduction:

The nVision platform has been created to replicate research projects that were previously conducted face to face until the social distancing rules introduced as a result of the outbreak of Covid-19. It has therefore been designed to facilitate one-on-one communications that enables the interviewer to control the process and provide the opportunity for respondent and interviewer to see each other.

When using *nVision* it is always good practice to follow these guidelines:

- Ensure there are no bright lights in the background, best practice is to light up your own face to ensure a quality image. Also be sure to be appropriately dressed!
- Check your microphone is set to pick up necessary audio. Ensure external sounds (radio, TV etc.) are switched off.
- If deciding to switch to recording during the interview remember to leave the meeting and return to ensure the recording is initiated. Note, recording can ONLY take place with the respondents specific permission - see appendix 1.

Resources required:

As was the case with traditional face-to-face research, the interviewer remains in control of how and when to engage the respondent and the interviewer will normally have been provided with a screener questionnaire as well as the questionnaire for the main survey, either as URLs or in paper format. In many cases the survey will use the same software as was previously employed for a CAPI study. Additionally, the research agency will normally provide the interviewer with a sample of potential respondents together with their telephone numbers, although the project may be such that the interviewer is required to create their own list.

Each interviewer minimally requires a telephone and a working internet connection, although preferably they would also have an up-to-date computer or laptop with microphone and camera. The platform is browser neutral and uses no 3rd party software or application, no hardware compatibility is required and there are no concerns around privacy and selling-on of interviewer and respondent data.

Finally, each interviewer will be provided with a file of survey URLs, one set for each interview required. Each set consists of two links, one for the interviewer and one for the respondent. In some cases the research agency will have specified that interviews should be observed, in which case a third link will have been provided.

Making Appointments:

The interviewer proceeds in the normal way – telephoning each potential respondent and qualifying him / her for the interview according to the screener questionnaire. Whenever a qualified respondent is identified, the interviewer requests their email address, or alternative medium, and arranges an appointment whenever possible. In some instances the appointment will follow on quickly from the screener interview and the interviewer needs to be ready for that opportunity.

Whatever the time /date for the appointment, the interviewer needs to inform the respondent of the nature of the interview and how long it is likely to take. They also need to assure themselves that the respondent has suitable equipment with Internet connection. In many cases the interview will NOT be recorded and therefore the respondent needs to be assured on that issue. Whenever the study does require recording, then the respondent needs to be informed at this stage. In some cases many of these details will have been covered within the screener questionnaire.

Then the details need to be confirmed to the respondent by email or other means. Normally this will include the following information:

a) Confirmation of the type of project and approximate interview length

b) Details of the research agency conducting the work.

c) Clarification of the type of interview: qual / quant; recorded / not recorded

d) Scheduled time of interview and whether to be observed or not.

e) Confirmation of GDPR compliance and the consent requirement.

f) The URL for the respondent to use for the interview and the interviewer's telephone number for the respondent to call should they have any difficulty connecting.

A copy of this confirmation will normally be sent to the project manager, together with the matching observer URL if required.

The Interview start-up:

A few minutes before the appointed time the interviewer should click onto the interviewer URL associated with that interview and they will then see the following screen:

A similar screen is also shown to the respondent and both parties need to complete the various consent details before the interview can proceed. Specifically, each party needs to agree to the use of the camera and the microphone and to then to explicitly consent to each of the following details:

> **a) Recording (if specified for the interview)**
>
> **b) Use of cookies**
>
> **c) The terms and conditions**
>
> **d) The terms of the privacy policy**

For GDPR purposes each of these items needs to be separately confirmed, even though all interviews are subject to the code of conduct of the Market Research Society.

The picture below provides a clearer image of this requirement.

Finally, when all permissions have been given, click the bar "Check Devices" and the software should respond with the message "You are good to go" – then click "Join meeting" and the interviewer should then see an image of themselves at the centre of the picture. Subsequently, this is substituted by an image of the respondent when they join and the interviewer's image is then relegated to the top right corner, as in the following example:

Further details:

Interviewers are also provided with a number of tools that will assist them with the interview process, depending upon the type of interview to be conducted. These tools are activated during the interview by clicking on the appropriate icon as displayed to the right of the interview screen and as also shown here on the right.
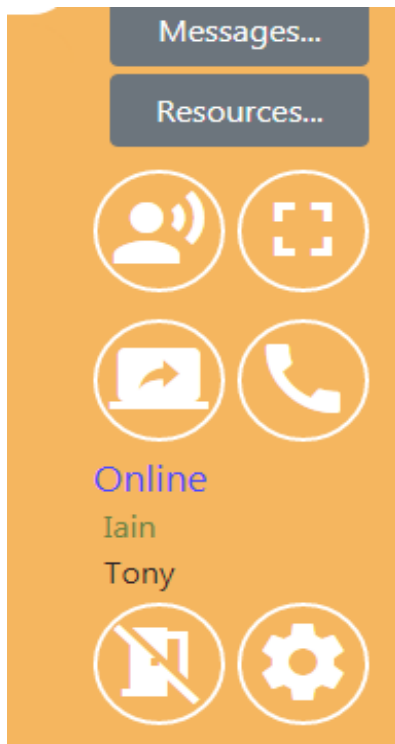
Messages: Enables the interviewer and the respondent to exchange text messages in the event of a technical issue that needs troubleshooting. The interviewer can also send the URL of any website or social media feed required as stimulus during the interview. This facility can also be used by an observer who may wish to advise the interviewer to a particular response and enquire further. When sent the message will 'pop up' in the centre of the recipients' screen.

Resources: Provides the interviewer with the opportunity to introduce other stimulus material into the interview. An example of this could be the pdf of an advertisement or product specification. Normally such material will have been placed upon a whiteboard to be shared with the respondent at the appropriate time.

In addition to answering any questions that may be required, the respondent can be encouraged to mark-up or otherwise highlight any of the whiteboard text or pictures of particular interest / concern to them.

Changes to and from full screen display

This icon is used to initiate a web-based phone call with the respondent. The file of URL's for the interviews can be provided with a unique number for each interview if required.

The share desktop icon. The interviewer clicks this to share their desktop with the respondent. Ideal for sharing video.

Click to leave the meeting once the interview has ended / been completed.

Appendix 1a: *nVision* and GDPR.

GDPR defines two types of responsible persons under the act: *Data Controllers* and *Data Processors*.

For the purpose of an *nVision* interview, the interviewer is a processor and the platform acts as the data controller on behalf of the research agency behind the project. There are a number of scenarios where *nVision* may be employed, but the core question remains – "*what rights are there for an nVision interviewer to approach a potential respondent?*"

One of the principal ideas behind *nVision* was to help maintain employment for interviewers whose professional engagement, prior to Covid-19, had been face-to-face work and therefore there are two primary scenarios:

    a) ***Pure Random Sampling*: to replicate those cases where the interviewer was doing a random walk survey in a neighbourhood either knocking on doors, or approaching persons at random in the street, then the supply of a list of random telephone numbers is sufficient to provide a similar random sample. Importantly, such numbers have NO personal data associated with them (not even a name); they cannot therefore be in breach of the act.**

b) *Recall interviews or specific targeted sample*: replicating those cases where contact information (including postal address) was supplied together with relevant data qualifying the respondent in some way.

Often scenario a) would have been employed for quantitative studies of some kind, whereas scenario b) is the more specialised area possibly involving qualitative studies, or panel work.

Either way, it is necessary for the *nVision* interviewer to explicitly obtain / renew the required permissions. In particular, it is important to be explicit as to whether any part of the interview will be recorded and to gain the right opt-in accordingly.

With regard to the interview and subsequent actions whenever the interview is NOT recorded then the position remains the same as previously was the case with face to face research. The data is maintained in confidence and used for statistical purposes only and, normally, it will be stored in such a way as to ensure that the information cannot be identified to the respondent.

When a recording of the interview is made, then the research agency must provide the interviewer with a precise description as to the use that will be made of that recording. That information should then be provided to the respondent, *before* their permission to record is obtained.

For our part Sample Answers retains all *nVision* recordings for up to 1 month after the end of the fieldwork period and then they are destroyed. The only records we maintain is the list of links for the study as provided to the research agency and the associated tools requested for each interview.

See https://nvision.sampleanswers.com/ for more information on nVision

See https://www.sampleanswers.com/privacy-policy/ for more information on data privacy.

Appendix 1b: GDPR, Covid-19 and face-to face interviewing.

Introduction:

The Market Research Society (MRS) in the UK has recently reminded us that face-to-face interviewing remains a legal activity, provided all government restrictions appropriate to the location of the interview are adhered to. The justification is that interviewing is work and, of course, the government is anxious to maintain as much economic activity as possible, whilst maintaining the fight against the pandemic. Details of the revised guidance from the MRS can be found here.

Nevertheless the fact is that face- to-face interviews are increasingly difficult to get and that more and more such work is moving either to the telephone or online. The result is that many of the benefits of face-to-face work are being lost and the jobs of those interviewers conducting such work are disappearing. Meanwhile a significant proportion of such work is moving to

video with one or other of Microsoft Teams, Google Hangouts, Zoom and others, including *nVision,* the special market research video platform provided by Sample Answers.

The question that arises is what are the GDPR implications for those interviewers who are moving from genuine face-to-face to video work?

Background:

The primary framework of the UK privacy law has been in operation for more than 20 years, ever since the 1998 Data Protection Act, and most of the requirements for compliance have been second nature to research companies and their employees since that time. Nevertheless the introduction of the General Data Protection Regulations (GDPR) in 2018 imposed a number of additional, specific obligations to ensure compliance by recording how personal data is collected, stored and used.

In particular, the act has imposed an obligation across the research process that makes *everyone* involved responsible for ensuring that they are acting in compliance with the act. So if an employee were to steal a file of sensitive private data, it is not only the employee that will be held responsible but also the company holding that data will be subject to prosecution. Likewise, in theory at least, if a company were to set up procedures that were in breach of the act then any employee following those procedures could be liable to personal prosecution. "*I was only obeying orders*" is not an excuse!

Key points:

The primary purpose behind GDPR is to place personal data under the control of the individual that is the subject of the data; indeed the official term for individuals, as used in the act, is *data subjects*. So, the objective is that the data subject's personal, private data shall not be exploited by any third party, without their permission.

Accordingly, data subjects have their personal data fully protected against any form of use, other than if one (or more) of the following three conditions is satisfied:

a) They have given *specific* permission for their data to be used in the manner suggested and by the entity proposing to use it; this is termed *informed consent.*

b) There is a *legitimate interest* in the data being used as proposed by the entity planning the use – such usage is normally subject to a *risk analysis*. With most bona fide research projects the risk analysis is almost a formality but whenever the topic is sensitive or the sample is specific (e.g. the elderly) then it becomes an important concern.

c) There is a legal requirement for the proposed use.

In fact consideration of what is lawful is even more precisely defined for online video work, because Zoom and the others are electronic communications

platforms and are therefore also covered by the *Privacy and Electronic Communications Regulations (PECR).* These regulations specify that use of email, cookies and other electronic means are *ONLY* acceptable with *informed consent*.

It is therefore important that any research agency providing interviewers with personal email addresses or individual telephone numbers shall have the appropriate permissions to pass them on. Also, the interviewers should always assure themselves of the origin of the sample, not only to ensure their compliance with the act but also to inform the respondent, if asked.

Finally, interviewers engaged in online video interviews must re-confirm that the respondent gives their permission for the interview and that the permission is clearly recorded in some way. Without that explicit permission the interview is in breach of GDPR.

Appendix 2: Choosing microphone in Chrome

Often the microphone that Chrome chooses to use is not the one that you expect, and this is a common reason for "We can't hear you". It may be a microphone that you had plugged in at some time in the past, even if it is no longer connected. For instance, maybe you used a headset (wired or Bluetooth) that had a microphone but you only used it for music, maybe with YouTube.

Changing Chrome's choice involves a couple of steps as below. First visit your meeting link and you should see the Welcome page:


Once you have clicked "Check devices" as requested, if you have chosen to use your camera or microphone a video icon should appear at the right of the
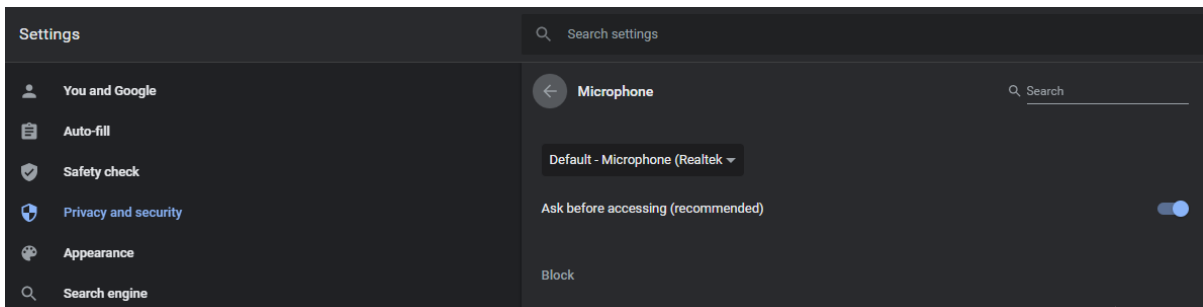
browser address bar and if you click the video icon, some choices should drop down:
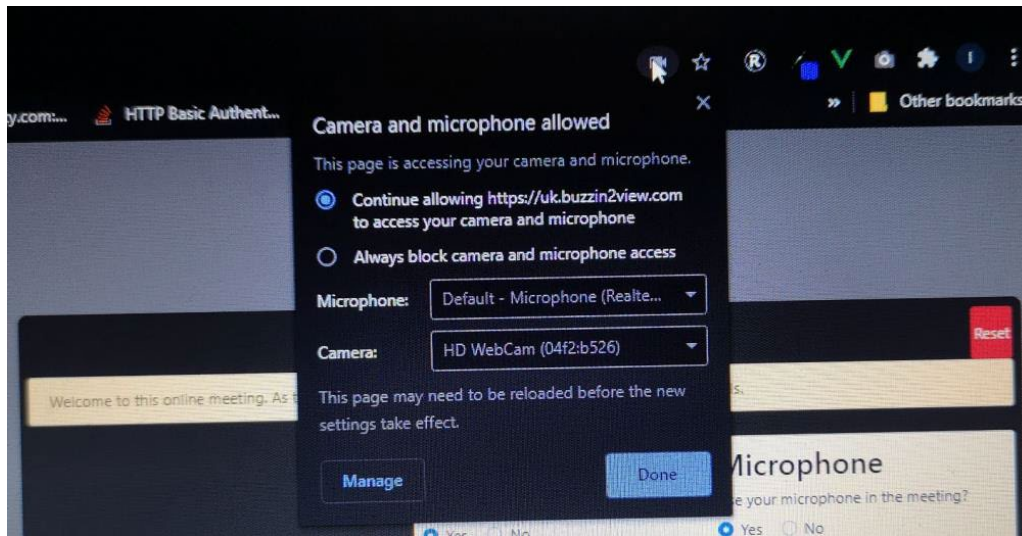

You can see the currently selected microphone. It should be the microphone you want to use in the meeting, but it may be something else, and we need to change it. To do that click "Manage"
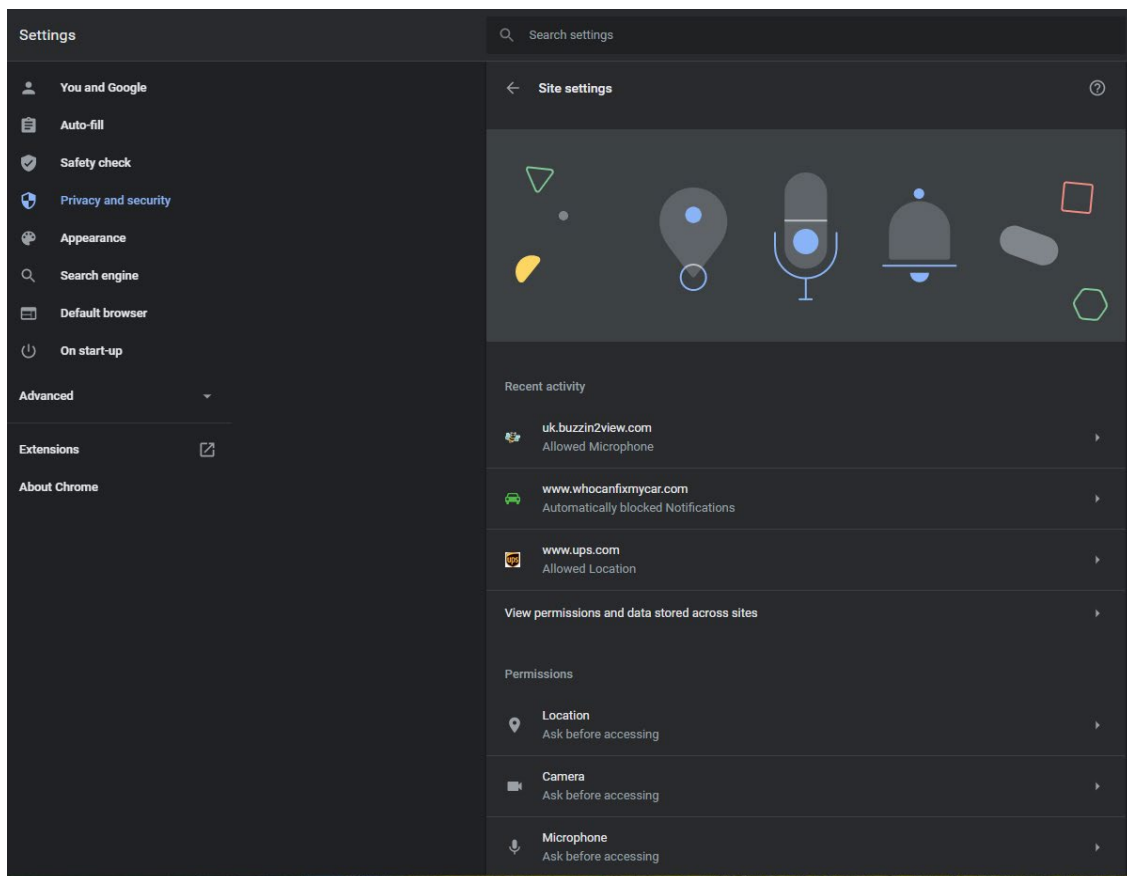
Scroll down to Microphone below permissions and click on the microphone icon:

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This drop-down is enabled and you can choose the correct microphone. The same microphone may appear several times (as itself, as Communications Device, and as Default). It doesn't seem to matter which one you use.
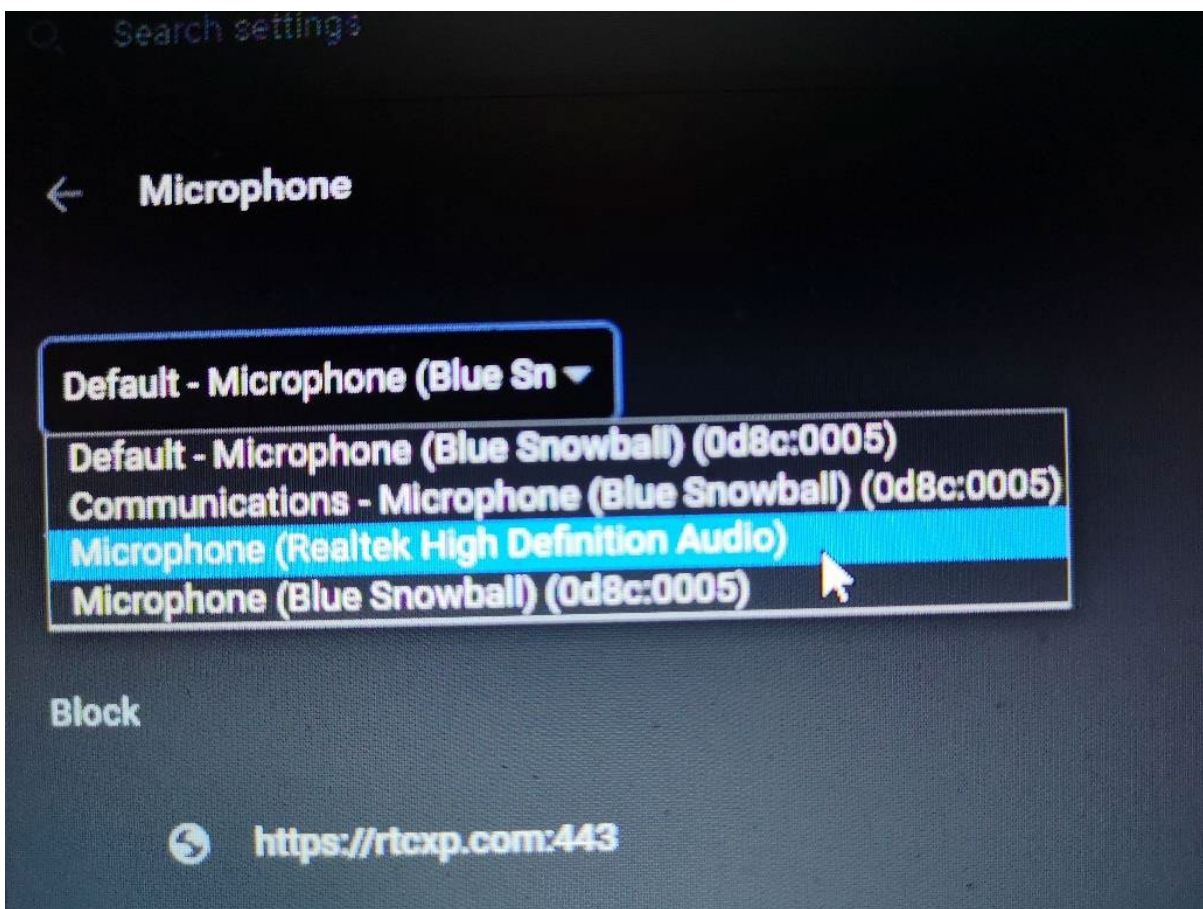
Choose the microphone you want (one that is currently active) and then return to the Chrome tab with the meeting link. Refresh this page, click Reset and continue. Now Chrome should pick up what you say.

Appendix 3: Audio issues in online meetings on Windows 10

Many users experience difficulties with audio when using audio and video conferencing applications on Windows, especially on Windows 10 that has several features enabled by default that impose a big overhead, and especially in browser-based applications.

Windows 10 is a resource-hungry system and may struggle to support these features during a video meeting unless your machine is high-specification (fast multi-core CPU with lots of memory and advanced video card), i.e. an machine configured for workstation applications or gaming.

Typically during an online session if your machine is struggling, other parties in a meeting will notice a significant lag in the audio from your device. This manifests as one or more of a failure of lip-sync or an echo or acoustic feedback (ringing, howling etc).

This may be intermittent, lasting just a few seconds, or persistent. If intermittent this is likely a background process in Windows consuming a lot of system resources for a short time. Common culprits are anti-virus software, One Drive or similar, and Windows Update. These problems are nuisances rather than show-stoppers and are quite fussy to mitigate. We don't discuss these further here.

Worse are problems that are persistent or get gradually worse as the meeting continues. Sometimes meetings are fine until you initiate screen-sharing, and then other participants start noticing problems with your audio and/or video. This is likely because the extra overhead of screen sharing brings the demand on your systems' resources to their limit.

There are three Windows features often enabled by default that are probably of no use to the typical user during the meeting or even outside it. They cause excessive use of the computer's CPU and memory and therefore excessive energy use – inherently wasteful and curtailing available time when on battery. In video meetings they may exhaust the machine's capacity causing impaired audio performance.

These features are all accessed via Windows settings and can be disabled (or re-enabled) there.

An easy way (of several) to access sound settings is via right-clicking the Windows icon in the task bar (typically bottom left of the screen), and then clicking Settings. From the available options, choose Sound.
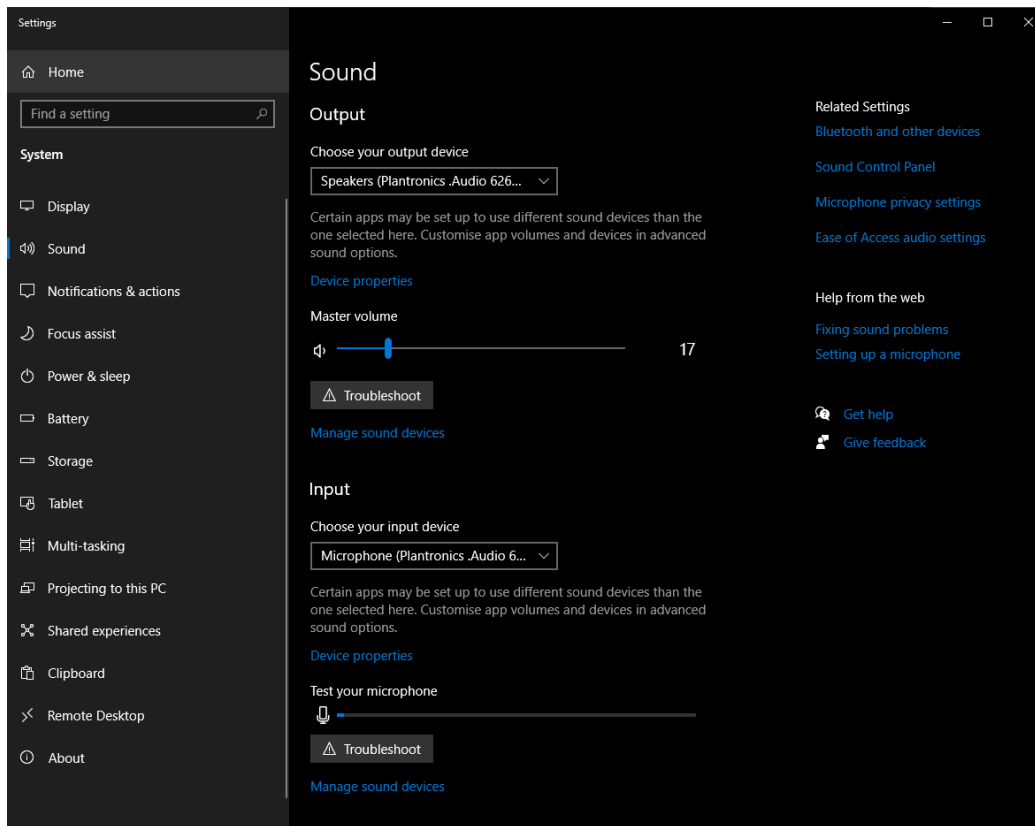
Make sure that the input (microphone) and output (speaker/headset) are set to the device you wish to use in your meeting. Only external devices that are currently plugged in (USB) or paired (Bluetooth) will be selectable.
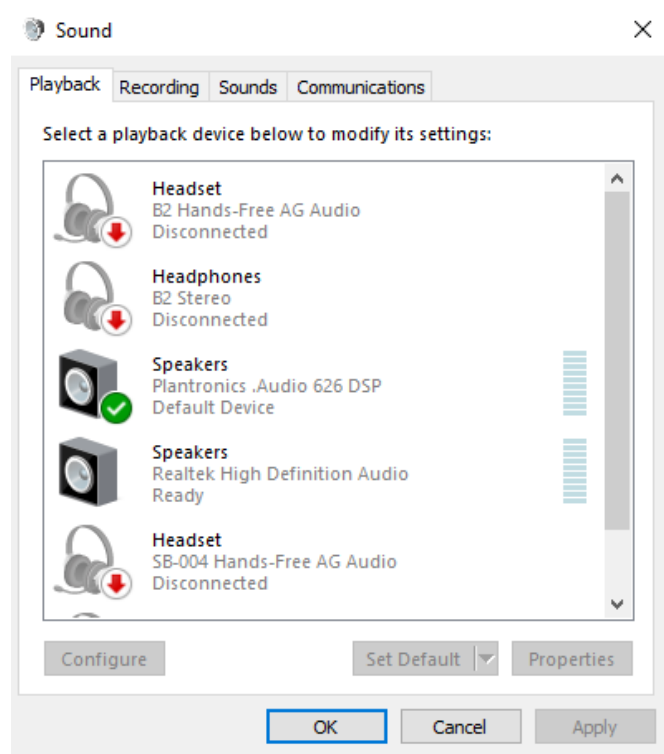
Disable audio enhancements

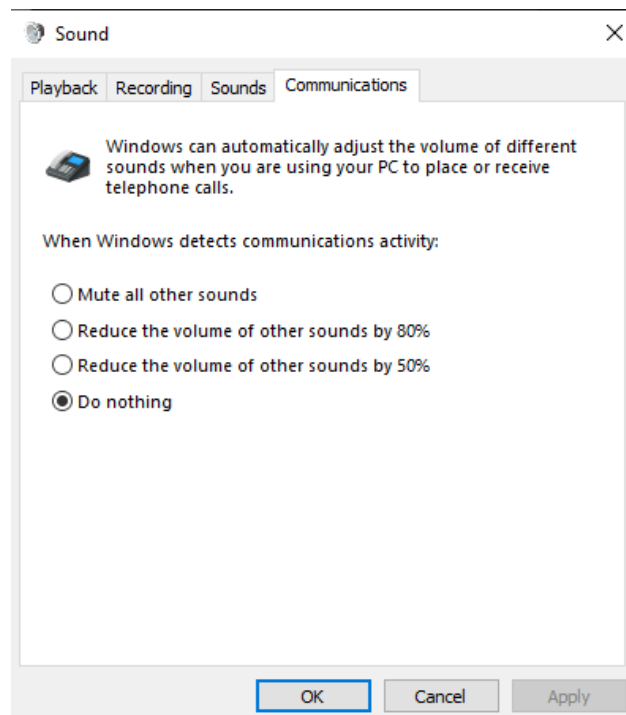**Click "Device properties"**
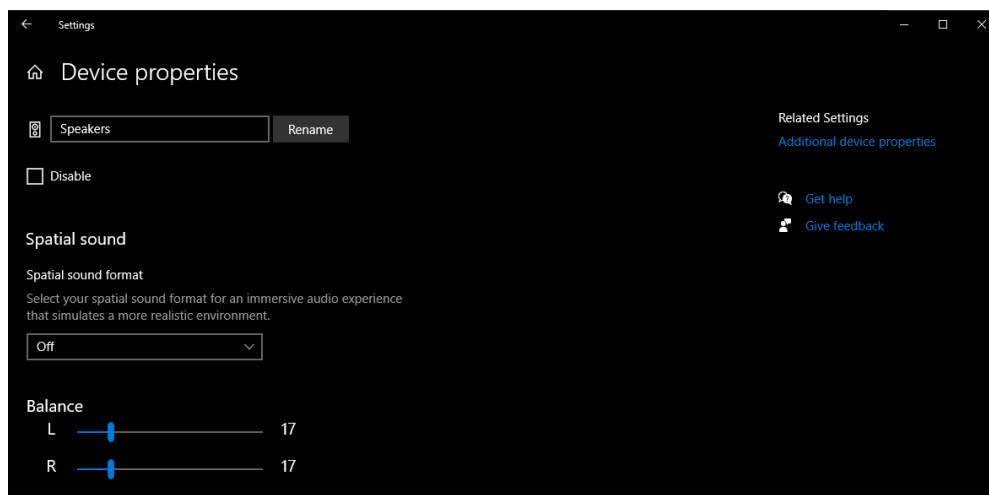
Make a note of the spatial sound format setting, if any, so you can restore it should you ever want to. Turn "Spatial sound format" off. Click the left arrow at the top to return to Sound Settings

Disable phone features. Click "Sound Control Panel"

Click "Communications"

Make a note of the existing setting so you can restore it should you want to. Ensure that "Do nothing" is set and click "Apply" then "OK".

This is the commonest cause of other participants complaining that your voice is distorted or cutting in and out.

Disable the game bar.

Windows provides a tool to record your activity in an application, as a convenience for gamers who want to record or stream their sessions. Having it available is a constant overhead, so we suggest you keep if disabled until (if ever) you need it.

NB: If you are a gamer, then probably you require these features regularly and also your system has sufficient CPU, graphic and memory performance that none of the changes we describe are needed – except possibly disabling phone answering as above. To continue to disable the gaming features:

Return to Windows settings as above.

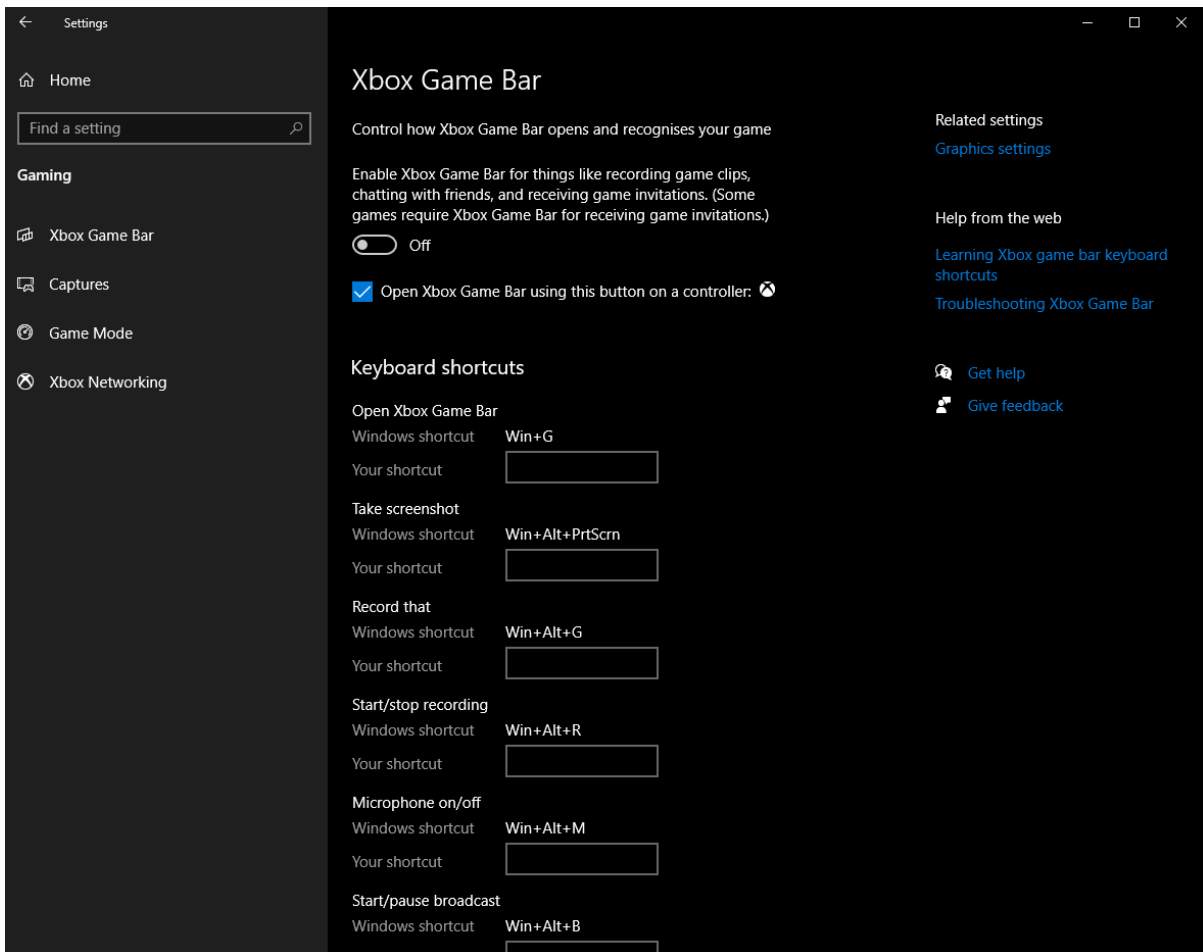**If Gaming does not show as one of the options, type Gaming in the search box:**
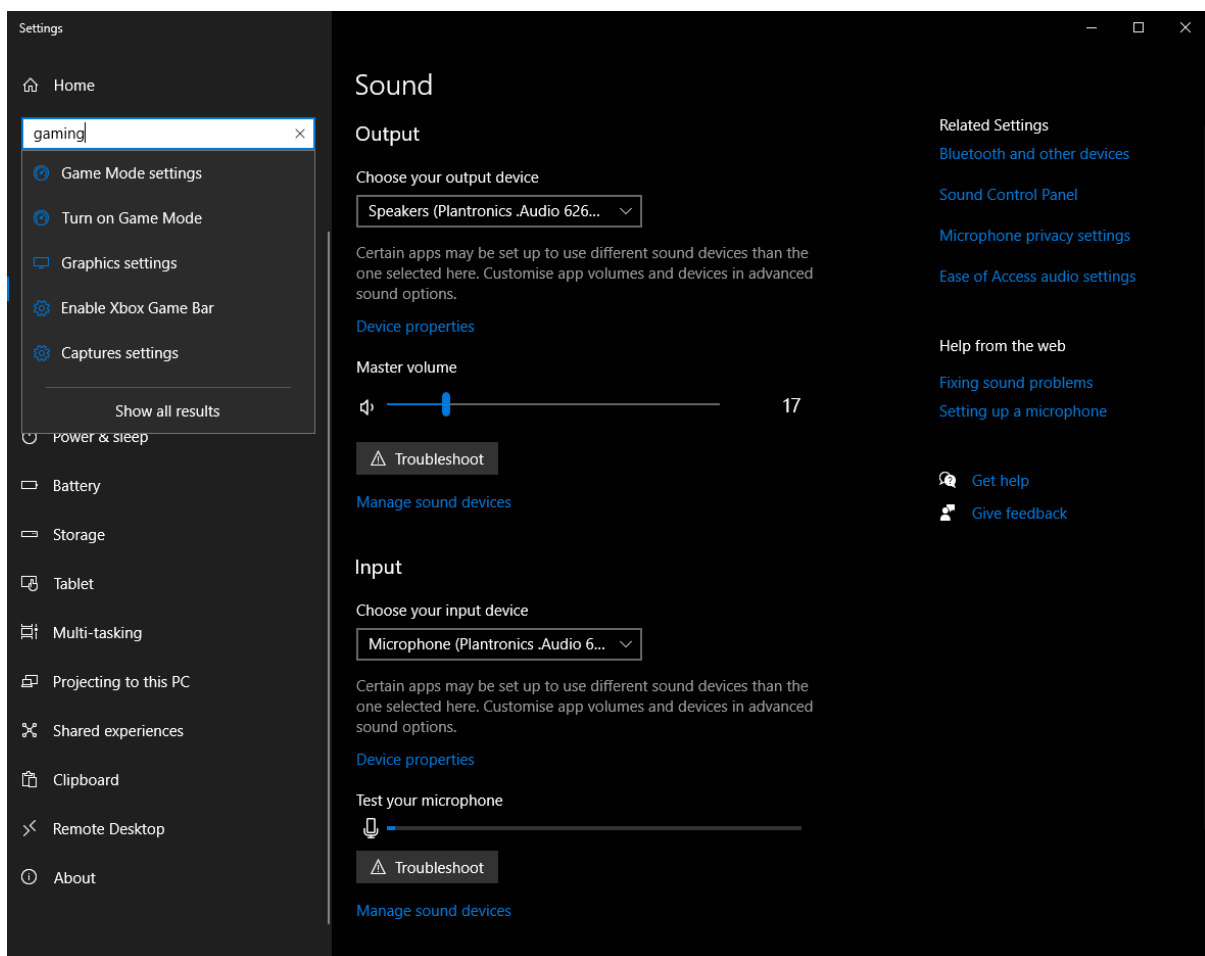
Select "Game Mode Settings" from the dropdown
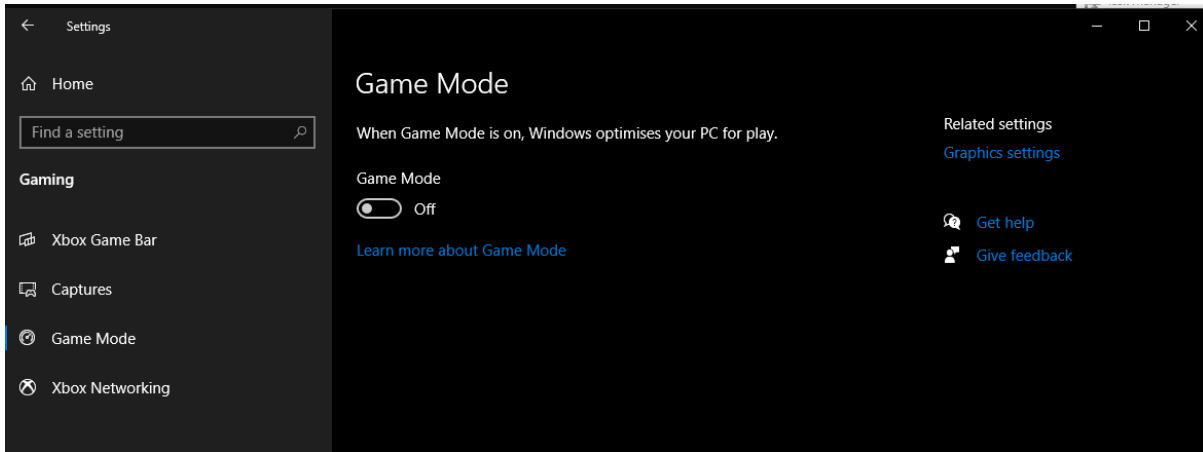
Turn Game Mode off

Click Xbox Game Bar

Turn Xbox Game Bar off.

Use a headset

It is wise to use a headset, if possible, in any online meeting, for several reasons:

To reduce the impact of background noise around you on your own hearing of the meeting
To reduce background noise from your environment affecting everyone else in the meeting
To reduce the distraction from the meeting to others within your earshot

Many laptops have poor built-in microphones or loudspeakers. The headset provides you and the other meeting participants with a better audio experience

Keep it simple

Before starting an online meeting based on a web link, you optimise your chances of a successful experience if you do the following:
Close all applications that you will not need in the meeting
Close all browser windows before the meeting
Plug in/pair your devices (headset, external microphone, speaker, webcam) before opening your browser to click the meeting link. Headsets often have their own volume controls and/or a mute setting for their microphone. Make sure beforehand that the volume is at a comfortable level and that the microphone is not muted.
Use that browser window only for the meeting – don't open other tabs in it, instead if for instance you need to visit a web site during the meeting (especially if you intend to screen-share it) open a new browser window to do it.

"We can't hear you"

If you see this message it means that whatever you said during the test was not received by our server. We have found several possible reasons for this:

- You spoke for less than two seconds.
- Your internet connection was very slow or absent while we were listening to you.
- Although you have permitted access to your microphone, the browser is not able to use it because another application running on your system (e.g. Skype, Zoom) that is reserving the microphone. They may need to be closed before your microphone becomes accessible.

- **You have more than one microphone and the browser is accessing a different one from the one you wish to use. This may happen if you have an internal microphone as well as a wired headset that is presently plugged in, or a Bluetooth headset that is paired.**
- **The microphone is disabled or set to a low sensitivity in your computer's sound settings.**
- **The microphone is physically muted by a control e.g. on a headset.**
- **The microphone is not working.**