Interviewer Quality Control Scheme

Minimum service standards for market research data collection

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Interviewer Quality Control Scheme

Minimum service standards for market research data collection

1 General

For market research conducted within the United Kingdom the organisation, where possible, shall purchase fieldwork services from suppliers complying with the requirements of this standard or with Appendix B of ISO 20252 Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements.

> NOTE: All references to ISO 20252 in this standard refers to ISO 20252:2019, on the understanding that organisations may still be certified to ISO 20252:2012 until such time that it is permanently withdrawn from circulation.

1.1 Sub-contracting fieldwork

Where it is not possible to purchase from accredited suppliers, reasons shall be recorded.

The organisation shall ensure that any sub-contracted fieldwork is carried out in accordance with, and therefore meets the validation and quality control requirements of, this standard or ISO 20252. To this end, the organisation shall document these validation and quality control requirements as applicable to the organisation and provide these to the supplier.

The organisation's responsibilities shall also extend to:

a) identifying and working to rectify any nonconforming work delivered by the supplier

b) maintaining project records required by the standard for internal or external audit purposes

1.2 Documented Information about Interviewers and Recruiters

1.2.1 The following documented information shall be available as electronic or hard copy records for each field-based interviewer and recruiter and each telephone centre interviewer and recruiter:

a) application form*;

b) date of interview or date of acceptance prior to training*;

c) training report form detailing types of training given, dates and length of training;

d) confirmation of previous training/experience (where reduced training is given);

e) any references received;

f) for field-based individuals, a report of accompaniment on first assignment;

g) for telephone centre based individuals, a report of supervision or monitoring on first assignment;

h) projects worked on;

i) appraisal reports;

j) for field-based individuals, validation checking conducted since the last inspection;

k) for telephone centre based individuals, quality control monitoring or validation checking since the last inspection;

l) details of significant deficiencies found in an individual's work, and action taken;

m) date identity card issued and card number (if relevant);

n) declaration by the interviewer or recruiter that all work shall be conducted in accordance with the MRS Code of Conduct and this standard.

*In the case of temporary telephone interviewers/recruiters who are provided by and paid through a recruitment agency, a) and b) are not required.

Information relating to interviewers and recruiters no longer used shall be available for a minimum of 12 months from their last day of work.

1.3 Reference Requests

NOTE 1. The taking up of some form of a general character reference is recommended for all individuals collecting data from the public. These references may be sought, for example, from other market research agencies, former employers, or other responsible individuals.

If a general character reference is received, either orally, e.g., on the telephone, or in writing, it shall be recorded on file, together with the name and position of the person who has given the information and the organisation they represent.

NOTE 2. This general character reference may be linked to a request for information related to previous training/experience.

1.4 Market Research Society Code of Conduct

On appointment, each interviewer and recruiter shall be issued with a current copy of the MRS Code of Conduct, covering at least the sections relating to the following:

a) responsibilities to participants;

b) responsibilities to the general public and the business community.

Thereafter, the organisation shall notify interviewers and recruiters of any revisions to these sections of the MRS Code of Conduct.

1.5 MRS Freephone for Participants

Interviewers and recruiters shall be made aware of the MRS Freephone Verification Service.

1.6 General Public Reassurances

Organisations shall ensure when conducting face-to-face fieldwork that:

a) Unless otherwise specified by the client, a 'thank you' or 'reassurance' leaflet or communication shall be left with or sent (electronically or otherwise) to all participants interviewed face-to-face, or displayed as a poster in a hall test.

b) Interviewer leaflets or communications shall give the interviewer's name or interviewer number and the name, address and telephone number of the organisation and contact details for the MRS and MRS Freephone Verification Service.

c) A privacy notice in an easily accessible form, such as a link where it can be consulted or alternative method if delivered in hard copy, e.g., QR code linking to the privacy notice.

Telephone interviewers/recruiters shall give participants the following information at the beginning of a call:

a) their name (or the name they use when interviewing/recruiting);

b) the name of the organisation they are calling from/on behalf of;

c) the purpose of the call;

d) if necessary, any further reassurances must be given on request, this may include the MRS Freephone Verification Service;

e) a privacy notice in an easily accessible form, such as a link where it can be consulted

For qualitative recruitment (for groups or depth interviews) information outlined in a) to e) may be incorporated into the invitation to attend or take part, if not already provided.

1.7 Complaints procedure

The organisation shall maintain a complaints procedure that allows participants to contact the organisation directly and speak to someone or listen to a recording to confirm the following information:

a) the identity of the market research organisation conducting the market research;

b) assurances that contact was made for market research purposes only.

1.8 Identity Cards for field-based individuals

The following rules shall apply to field-based individuals except auditors and those who conduct only specialist interviews.

a) Identity cards shall be issued at the beginning of each year to all field-based individuals who face the public and are regarded as open to employment during the year or, for infrequently used individuals, for their first assignment.

b) Identity cards shall be issued to new field-based individuals prior to their working on live projects. If temporary cards are issued (without photographs) these shall be valid for no more than one month.

c) Each year, the organisation shall include a photograph of the individual on their identity card before the individual receives it.

d) The organisation shall make every effort to ensure that all individuals working on its behalf use the identity card issued to them by that organisation, and not a card issued by any other organisation.

e) The organisation shall make every effort to retrieve the identity card (if still valid) when an interviewer or recruiter ceases to work for the organisation.

f) If the MRS identity card is not used, the organisation's name, address and telephone number shall appear on the organisation's identity cards

Interviewers who only conduct specialist interviews shall be issued with identity cards as described in a) to f), or with personalised business cards which may be left with the participant. Personalised business cards shall show the interviewer's name, and the organisation's name, address, and telephone number.

1.9 Training materials

The organisation shall issue training materials to supervisors, interviewers, and recruiters covering general training instructions appropriate to the tasks they will be asked to carry out for the organisation. The organisation shall consider appropriate methods to distribute such materials to individuals working remotely, to ensure they are easily accessible.

When materials are revised or updated, the new version shall include the date the revision was issued. Previous versions must be replaced or updated, and changes disseminated.

2 General Administration

2.1 General project requirements

The following documented information shall be available:

a) the names of the individuals who worked on the project;

b) interviews achieved (e.g., the interviews achieved/questionnaires returned);

c) briefing information;

d) a copy of the questionnaire/data collection material;

e) for face-to-face data collection, method(s) of validation used, where relevant, number of validation checks attempted, for each interviewer whose work was checked;

f) for telephone data collection, monitoring results attempted and successfully achieved, for each interviewer whose work was checked;

g) for recruitment, the number of participants who attended each group relating to that project (subject to validation guidelines in 7.4, 7.5, and validation levels outlined in 7.10);

In addition to items a) to g), where appropriate any other relevant feedback or corrective action shall be documented.

All questionnaires shall record:

- the date of interview
- duration of interview
- identity of the interviewer.

2.2 Project Briefing

Supervisors, interviewers and recruiters shall be adequately briefed on every project, either in person or remotely based on the needs of the project and methodology.

NOTE1. Requirements for the briefing of auditors are covered in Section 8.

As a minimum, the briefing shall include details of:

- fieldwork dates;
- the target number of interviews;
- methodology;
- requirements of the project;
- attendance records;
- audio / visual recording permissions;
- any observation requirements.

Records shall be kept showing the full content of the briefing and instructions and to show that all supervisors, interviewers, and recruiters allocated to the project have received briefing and instructions.

Recruiters shall be given a clear indication as to the requirements for each project. These shall be clearly specified and include, as relevant for the project:

a) fieldwork dates/group dates and times;

b) key recruitment criteria;

c) quota requirements;

d) number of participants to recruit for each group, and where appropriate, maximum/minimum number of participants required to attend;

e) confirmation of appropriate and acceptable or unacceptable methods of recruitment (e.g., whether snowballing/telephone contact/use of panels, are acceptable or not);

f) specific exclusions and restrictions on participants who have previously attended a group. This would include the requirement for virgin participants or the acceptable time gap/eligibility criteria for previous attendees.

2.3 Code of Conduct Declaration

The organisation shall ensure that all interviewers/recruiters complete a declaration to say that the work they are undertaking has been, or will be, conducted in accordance with the MRS Code of Conduct. Evidence of this shall be documented and available for audit.

Organisations shall select one or more of the following ways for individuals to sign the declaration, and consider appropriate timeframes to refresh this declaration:

a) a signed declaration (either on paper or via electronic signature);

b) confirming the declaration via entry in the CAPI/CATI script (as part of the questionnaire or separately);

c) a signed declaration on pay claims/time sheets;

d) by keeping a copy of the individual's signed MRS Interviewer Identity Card.

2.4 Telephone centres

A supervisor, or member of head office staff, shall be present for the complete duration of each interviewing period.

2.5 Venue / Hall Tests

To ensure the premises are suitable for hall tests / groups, a new venue shall be inspected before it is used for the first time, unless the suitability of the venue is not in question. This inspection shall be conducted by a person who has been appropriately briefed for the task and the inspection shall be documented.

A supervisor or suitably qualified individual shall be present throughout each day.

2.6 Additional Qualitative requirements

A record of the invitation/confirmation sent or provided to all participants recruited to confirm details of the group/depth must be available.

Moderator feedback shall be documented following each group or depth.

This shall include information on:

a) attendees (eligibility and appropriateness);

b) the venue(s);

c) the hosting of the group.

Significant problems or deficiencies shall be reported to the appropriate recruiter before their next assignment. Details shall be documented.

3 Supervisors

A supervisor is an individual who on behalf of the organisation undertakes at least one of the following data collection tasks:

- selecting and interviewing new recruits;
- training;
- monitoring/appraisals/accompaniments/validation;
- project management;
- allocating work, progress chasing and/or project and quota control.

NOTE: an individual employed full or part-time who assists with supervisory tasks as defined above will not be deemed to be a supervisor unless the vast majority of their time is spent in the performance of such tasks.

3.1 Appointment of Supervisors

Prior to appointment as a supervisor, the individual shall be interviewed by a member of the organisation's staff, a record of the interview must be documented.

If an individual is already working for the organisation and is therefore already known to a member of the organisation's staff or supervisory team, an interview may not be deemed necessary, in which case the previous relationship and the individual's suitability shall be documented.

3.2 Training of Supervisors

The organisation shall ensure that all supervisors are adequately and appropriately trained/experienced, to carry out all tasks asked of them.

On appointment of a new supervisor, training needs for that individual shall be identified and documented. The content and dates of training given shall be recorded and kept on the individual's file.

If supervisory tasks are conducted by assistant supervisors or senior interviewers who have been trained in specific elements of supervisory work, the organisation shall demonstrate that such individuals are adequately trained/experienced to carry out the work. Supporting documentation to this effect shall be available for inspection.

3.3 Recommended training content for supervisors

Listed on the following table is the basic training content required depending on what supervisory role they will be undertaking for the company.

It is suggested that all supervisors should have undertaken the appropriate interviewer training and have been an interviewer/recruiter at some time in the past.

All training materials must be available for inspection.

Table 1 – General MR Standards/Administration
The MRS Code of Conduct
Appropriate elements from data protection guidelines
Appropriate elements from Health and Safety guidelines
Appropriate times for interviewing
Special care when interviewing children, vulnerable or elderly participants, etc.
Assurance of participant confidentiality and anonymity
Explanation of the certain types of market research to be undertaken
Market research terminology and jargon
Knowledge of the organisation, personnel, administrative procedures and all relevant manuals
Role of the supervisory team and head office
Knowledge of any CAPI/CATI software used
Full knowledge of the IQCS minimum standards
Full knowledge of the IQCS procedures and the organisation's requirements
Full knowledge of the organisation's validation procedures on all methodologies
Knowledge of information security requirements applicable to their role
Group Recruitment
Full knowledge of hostessing, venue requirements and the role of the moderator
Full knowledge of group recruitment administration
Project Management:
Briefing a project
Quota control
Sample management (if appropriate)
Editing/Checking questionnaires
Use of the Thank You leaflet/communications and standard reassurances, etc.
Problem solving
Dealing with the public's queries and complaints
Questionnaire completion/administration
Use of visual aids/concepts/product (as appropriate)
Project feedback and communication
Allocating/Progress chasing on a project
Monitoring system
Quota controls and sampling methods
What to do when problems arise
Office communication requirements
Knowledge of full survey details
Knowledge of interviewer panel/availability
Quality Control: Recruitment and Training
Relevant employment law for employing foreign nationals
UK Working Time Directive (WTR)
Quality Control: Accompaniments/Appraisals and monitoring
Full knowledge of interviewers/recruiters work history i.e., edit reports, previous a/c reports, etc.

3.4 Performance Appraisal of Supervisors

Organisations shall meet the following requirements in relation to supervisor appraisals:

a) Each supervisor should be appraised face-to-face or interactively at least once per year, by an appropriate line manager, and allow an opportunity for a two-way dialogue

b) The first appraisal should be within 12 months of their appointment to conduct supervisory work;

c) Appraisals shall include feedback on performance, identify training needs, and offer guidance or further training where appropriate.

NOTE1: Individuals who only conduct validation should be appraised at least once a year.

NOTE2: Where it is not possible to conduct an annual appraisal, the reason for this must be documented.

Documentation of the appraisal shall be kept on file and be available for inspection. The supervisor shall sign to confirm that the appraisal has taken place. This may include an electronic sign off.

3.5 Documented Information Relating to Supervisors

The following documented information for each supervisor shall be available:

a) application form;*

b) date of interview and appointment as a supervisor, if relevant;*

c) training report form detailing types of training given, and dates;

d) references received, if relevant;

e) appraisal reports;

f) date identity card issued and card number, if relevant.

*In the case of temporary supervisory staff who are provided by and paid through a recruitment agency, a) and b) are not required.

4 Recruitment of Interviewers and Recruiters

4.1 General

Interviewers and recruiters shall be interviewed and appointed by a member of the organisation's staff or supervisory team.

If an individual is already known to a member of the organisation's staff or supervisory team, an interview may be deemed unnecessary, in which case the previous relationship and the individual's suitability shall be documented.

The date the interview is conducted shall be documented.

If the interview is conducted on the telephone, the organisation shall ensure that the suitability of the individual is confirmed during training.

4.2 Verification of linguistic skills

When recruiting individuals, a short interview or written test shall be taken to ensure:

a) That they are fluent in the language in which interviewing will be conducted.

b) If they will interview in languages other than English, that their English comprehension is sufficient to understand the information that will be imparted during training and subsequent survey briefings.

Records to this effect shall be kept in the individual's file.

When interviewing in their first language, where an individual is found to have a less than sufficient understanding of English, it is recommended that an appropriate member of staff (a bilingual supervisor, interviewer or recruiter) attends the training and subsequent briefings, to ensure the individual has a comprehensive understanding of the task in hand.

Where recruitment agencies are used to source interviewers/recruiters, verification of linguistic skills may be conducted by the recruitment agency. The steps used to determine fluency shall be documented by the organisation to ensure they are adequate to the purpose.

5 Training of Interviewers and Recruiters

5.1 General

All training material shall be kept on file.

Training shall be given by a supervisor or member of the organisation's staff, who is adequately and appropriately trained and experienced to conduct the training.

The organisation shall ensure that all interviewers/recruiters are adequately and appropriately trained/experienced to carry out all the various types of work that they will undertake.

5.2 Length and Content of Training

The dates and length of training given shall be recorded.

The trainee shall sign a document to confirm the date(s) and length of training in hours given and this shall be kept in the individual's file.

All individuals taken on to conduct interviewing duties shall be given training meeting minimum requirements set out in **Table 2**, and all individuals taken on to conduct group recruitment shall be given the training meeting at least minimum requirements set out in **Table 3,** subject to qualification requirements for reduced training set out in **5.2.1** and **5.2.2**.

Minimum training times are recorded in **5.3**.

> NOTE: For recruiters, field and telephone interviewers, at least half of training should be conducted either face-to-face or interactively.

5.2.1 Reduced training for experienced individuals

Individuals may qualify for a reduced level of training, if the individual has recent and relevant experience from another market research agency complying with the requirements of this standard. To qualify for a reduced level of training, the organisation should ensure that:

a) the individual has worked for an organisation complying with the requirements of Appendix B of ISO 20252 or the IQCS Standard in the last 12 months; and

b) has had appropriate / relevant experience in the types of work to be undertaken while working with that company during the last 12 months.

> NOTE: Individuals who do have recent relevant experience may still be given full training if the organisation deems it necessary/appropriate.

To ensure that the individual qualifies for reduced training, the organisation shall seek confirmation of that individual's relevant training/experience from another market research organisation(s) which meets the above criteria. This confirmation, whether received orally (e.g., on the telephone) or in writing, shall be documented and include the date given and the name, position and company of the referee.

> NOTE: For recruiters, this experience will either be i) other types of market research fieldwork, or ii) qualitative recruitment, and this must be confirmed and evidenced.

> NOTE: Confirmation of the individual's relevant training/experience must be requested from the market research organisation concerned, not from a shared

supervisor (unless the organisation asks the supervisor to respond on their behalf).

Wherever possible this confirmation shall be received prior to reduced training being given and in any case the individual's work shall not be used before the confirmation is received.

Where relevant experience cannot be confirmed and evidenced, the individual shall be regarded as new to market research and given the full training detailed in **Table 2** and **Table 3** as appropriate.

Details of training given by the organisation shall be kept in the individual's file and include details of previous training/experience where reduced training is given.

In addition to training, the individual shall be accompanied during their first assignment as detailed in **5.4** and a record of this kept in the individual's file.

5.2.2 Project-specific training for individuals new to market research

Individuals may qualify for reduced training where they are appointed to work on one specific project for which full training is deemed inappropriate or unnecessary due to the limited and specific nature of the task.

Individuals who have received project-specific training shall be identifiable from fully trained individuals, to ensure they are not used for other work without completing the full and appropriate training as specified in **Table 2** and/or **Table 3**.

If a project-specific training programme is developed for one project, supporting documentation shall be available. The dates, length and content of the training given shall be documented.

5.3 Minimum training times

Individuals	**Minimum training time**		**Notes**
Type of personnel	**New to market research**	**With recent and relevant market research experience**	
Field-based interviewers	12 hours	3 hours	This may include some time spent conducting dummy interviews in field.
Telephone centre-based interviewers	6 hours	3 hours	This may include some time spent conducting dummy interviews or in roleplay exercises.
Recruiters	6 hours	3 hours	
Project-specific interviewers	As determined by the organisation		

Table 2 – Minimum Training Content for Interviewers **All training materials must be available for inspection.**		**Worked for IQCS/ISO 20252 accredited company in the last 12 months.**	
	If new to market research	**Not conducting the intended type(s) of work**	**Conducting the intended type(s) of work**
Introduction to the organisation, personnel and administration	Yes	Yes	Yes
The purpose and value of market research	Yes	—	—
The importance of accurate and ethical data collection	Yes	Yes	—
Explanation of types of research to be undertaken	Yes	Yes	—
The MRS Code of Conduct	Yes	Yes	Yes
Appropriate elements under the Data Protection Act 2018	Yes	Yes	Yes
Special care when interviewing children, vulnerable or elderly participants, etc.	Yes	—	—
Use of identity cards and MRS Freephone numbers	Yes	Yes	Yes
Assurance of participant confidentiality and anonymity	Yes	Yes	—
How to encourage participant participation	Yes	Yes	—
Market research terminology and jargon	Yes	—	—
Use of 'Thank You' Leaflets / Reassurances	Yes	Yes	—
Use of the organisation's manuals	Yes	Yes	Yes
Role of the supervisory team and head office	Yes	Yes	Yes
Monitoring system for progress of work	Yes	Yes	Yes
What to do when problems arise	Yes	Yes	Yes
Appraisal method and frequency	Yes	Yes	Yes
Quality control procedures (incl. validation/monitoring)	Yes	Yes	Yes
Sampling methods and examples of sampling used	Yes	Yes	Yes
Recruitment methods e.g., doorstep, street, telephone, etc.	Yes	Yes	—
Quota controls and examples of quota sheets used	Yes	Yes	Yes
Interviewer courtesy/manner	Yes	—	—
Interviewing technique	Yes	—	—
Types of questions, including prompting and probing	Yes	—	—
Questionnaire completion and administration	Yes	Yes	Yes
Use of visual aids/concepts/products	Yes	Yes	Yes
Demographics/classification/social grading	Yes	—	—
The organisation's communication requirements	Yes	Yes	Yes
Full knowledge of the way in which the company monitors progress of an individual's work	Yes	Yes	Yes
The importance of identifying and screening the correct participant	Yes	Yes	Yes
Appropriate elements of the health and safety guidelines	Yes	Yes	Yes
Some practical experience of interviewing, such as dummy interviews or interviewing roleplay	Yes	—	—
Before individuals commence work, they must be assessed to ensure they have understood and assimilated the information covered during training. This may form part of the training programme itself and shall be documented.			

Table 3 – Minimum Training Content for Recruiters **All training materials must be available for inspection.**	**If new to market research**	**Experienced, but new to group recruitment**	**Experienced at group recruitment**
Introduction to the organisation, personnel and administration	Yes	Yes	Yes
The purpose and value of market research	Yes	—	—
The importance of accurate and ethical data collection	Yes	Yes	—
Explanation of types of research to be undertaken	Yes	Yes	Yes
The MRS Code of Conduct	Yes	Yes	Yes
Appropriate elements under the data protection act	Yes	Yes	Yes
Special care when recruiting children, vulnerable or elderly participants, etc.	Yes	—	—
Use of identity cards and MRS Freephone numbers	Yes	Yes	Yes
Assurance of participant confidentiality / anonymity	Yes	—	—
Market research terminology and jargon	Yes	—	—
Use of 'Thank You' Leaflets / Reassurances	Yes	Yes	—
Use of the organisation's manuals	Yes	Yes	Yes
Role of the supervisory team and head office	Yes	Yes	Yes
What to do when problems arise	Yes	Yes	Yes
Appraisal method and frequency	Yes	Yes	Yes
Quality control procedures (incl. validation / monitoring)	Yes	Yes	Yes
Sampling methods and examples of sampling used	Yes	Yes	Yes
Recruitment methods, e.g., doorstep, street, telephone, etc.	Yes	Yes	Yes
Monitoring system for progress of work	Yes	Yes	Yes
Quota controls and achieving required number of interviews	Yes	Yes	Yes
Interviewing technique	Yes	—	—
Types of questions, including prompting and probing	Yes	—	—
Recruiter courtesy/manner	Yes	Yes	—
Recruitment questionnaire completion / administration	Yes	Yes	Yes
Some practical experience of recruiting	Yes	Yes	—
The organisation's communication requirements	Yes	Yes	Yes
What happens at a group discussion	Yes	Yes	—
The importance of qualitative work	Yes	Yes	—
How to encourage participant participation	Yes	Yes	—
Group dynamics	Yes	Yes	—
Role of the moderator	Yes	Yes	—
Observation requirements	Yes	Yes	—
Confirming group attendance/invitations	Yes	Yes	Yes
Use of visual aids/concepts/products	Yes	Yes	Yes
Demographics/ classification/social grading	Yes	—	—
Practical arrangements for in-home groups	Yes	Yes	—
Full knowledge of the way in which the company monitors progress of an individual's work.	Yes	Yes	Yes
The importance of identifying and screening the correct participant	Yes	Yes	Yes
Appropriate elements of the health and safety guidelines	Yes	Yes	Yes
Some practical experience of interviewing, such as dummy interviews or interviewing roleplay	Yes	—	—
Hostessing	Yes	Yes	—
Before individuals commence work, they must be assessed to ensure they have understood and assimilated the information covered during training. This may form part of the training programme itself.			

5.4 First Interview Accompaniment / Monitoring to Complete Training

In addition to full or reduced training, interviewers shall be accompanied / monitored during their first assignment / shift or monitored / supervised if in a telephone centre. This shall be as close to the start of the assignment / shift as possible and practical, and of a sufficient duration to ensure that the individual is adequately trained and competent.

The interviewer's work shall not be used until this first assessment has taken place and the work deemed acceptable. If, for any reason, it is not possible to accompany / monitor a particular individual during their first assignment / shift, the organisation shall attempt to validate 100 % of that individual's work before the work is used. The organisation shall document the reason for not accompanying / monitoring the individual and details of the validation of the work, and will aim to accompany / monitor that person at the earliest opportunity on their next assignment / shift.

In the case of specialist interviewing, if the type of work is unsuited to personal accompaniment or supervision / monitoring, the trainer shall establish that the individual is adequately trained and competent. In these instances, one or more interviews conducted on their first assignment / shift shall be recorded (with the full knowledge and consent of the participant) and listened to by a suitably skilled person, before the work is used.

For group recruiters, the recruiter shall either:

a) be accompanied (monitored/supervised if in a telephone centre) as close to the start of their first assignment / shift as possible, and for long enough to establish that the individual is adequately trained and competent to work alone; or

b) their work shall be validated by checking participant eligibility, etc., before their first group takes place. Organisations shall ensure that any validation checks that are not completed before the group is convened are conducted at the group venue before the group commences.

5.5 Training for New Types of Work

If an individual is to be used subsequently on a type of work for which they are not adequately trained and experienced (e.g., auditing, group recruitment, CAPI/CATI, etc.) further training shall be given by the organisation before the individual is allocated to that type of work.

A record of such training shall be kept in the individual's file.

5.6 Training Evaluation

Following training sessions, attendees shall be given the opportunity to evaluate and provide feedback about the training provided. Feedback should be kept in the interviewer/recruiter file or the trainer's file, as deemed appropriate and reviewed for the purpose of continual improvement of the training programme.

5.7 Sub-contracting to External Training Providers

If training is subcontracted to a third party, the IQCS member company shall ensure that:

a) the training supplier is appropriately and adequately skilled;

b) the training content covers all appropriate elements within the type of training being given (see **Table 2** and **Table 3**), including organisation-specific background and administrative information (unless that part of the training is covered by the organisation);

c) all training materials and the length of training provided are appropriate and adequate, in line with IQCS training requirements;

d) details relating to the training given, and the training materials used, shall be kept on file by the IQCS member company.

6 Appraisals

6.1 General

The performance of field-based individuals, telephone interviewers and recruiters shall be regularly appraised. Appraisals / monitoring shall be conducted by a supervisory person adequately trained and experienced to fulfil this role.

Appraisals / monitoring shall allow an opportunity for two-way dialogue.

The appraisal / monitoring report shall contain, as a minimum:

a) date(s) the appraisal / monitoring report was completed;

b) the length of time spent accompanying / monitoring an individual shall be documented;

c) whether the appraisal / monitor was face-to-face or by telephone;

d) tuition/guidance given;

e) evidence of two-way dialogue;

f) identification of further training needs;

g) where any problems or deficiencies, requiring action to be taken, are detailed on any appraisal form, this shall be agreed with the interviewer and securely kept on file as detailed above.

A signature or other evidential means shall be used to authenticate and date this report by the person(s) who wrote/conducted the appraisal / monitor and the interviewer / recruiter.

Where appropriate, feedback from the following sources may be included as part of the appraisal / monitor:

a) accompanied interviewing/recruiting;

b) previous monitoring reports;

c) information gathered from validation checks;

d) reports from coding/data entry managers/editing reports;

e) executives;

f) field office or supervisory staff;

g) group moderators.

During the IQCS inspection processes, where the report is not available, the individual may be contacted by the inspector to confirm that the appraisal / monitor had taken place.

6.2 Frequency of Appraisal

6.2.1 Field-based Interviewers

Yearly assignments / projects	Appraisal frequency
1-4 assignments	Once every alternate year, or on the next occasion thereafter that they work, if they are used less frequently.
5-9 assignments	Once per year
10 or more assignments	Twice per year, ideally once in each six-month period, i.e., once January to June, and once July to December.

NOTE 1: The first appraisal shall be carried out either within six months of the date on which the individual was accompanied on their first assignment, or on the next occasion thereafter that they work, if they are used less frequently.

NOTE 2. For example, an individual who had their training accompaniment in February, would be due for appraisal before the end of August (i.e., within 6 months).

6.2.2 Field-based Recruiters

Those who only undertake group recruitment shall be appraised as a minimum once per calendar year or if they work on less than three projects per year, appraised at least once every alternate year, or on the next occasion thereafter they work.

NOTE 1: The first appraisal shall either be carried out within 12 months of the date on which the individual was accompanied / validated on their first assignment, or the next occasion thereafter they work if they are used less frequently.

Any individual who conducts interviews in addition to group recruitment, shall be appraised in accordance with the requirements for interviewers.

6.2.3 Hall Tests

If only one supervisor is present, and the interviewing is being done on CAPI, the supervisor may conduct one (but no more than one) accompaniment while running the hall. Any other accompaniments done at that hall must be conducted by a second supervisory person.

If interviewing is <u>not</u> being done on CAPI, <u>all</u> accompaniments should be undertaken by someone other than the supervisor who is running the hall.

6.3 Method of Appraisal for Field-based Interviewers / Recruiters

At least one of the appraisals conducted in a calendar year shall be face-to-face and include an element of accompanied interviewing/recruiting/hostessing. The time spent on this appraisal shall include at least 1 h accompanying/observing the individual at work (e.g., interviewing, recruiting, hostessing) and then as much time as is necessary to give feedback, and, if needed, guidance and further tuition.

Field-based qualitative group recruiters only may not require being accompanied, but shall be seen at least once per year by head office, supervisor, moderator, etc.

Specialist face-to-face interviewers who cannot be accompanied shall be monitored remotely or back-checked once per year. Specialist interviewers shall be seen at least once per year by head office, supervisor, moderator, etc., and this should be documented.

The appraisal should incorporate feedback from validation, accompaniment, edit checks and feedback from supervisors.

> NOTE: The feedback element of this appraisal may be conducted on a separate/subsequent occasion.

All contact with the individual which forms part of the appraisal shall be documented.

6.4 Appraisal of Telephone Centre Interviewers and Recruiters

> NOTE: An organisation may use a continuous monitoring system as input to appraisals.

Unless a continuous monitoring system is in operation, each interviewer and each recruiter shall be appraised at least once in a calendar year. An appraisal report shall be documented and dated, signed by the interviewer/recruiter and show details of actions taken/further training given, where appropriate.

Where a continuous monitoring system is in operation, evidence of a two-way dialogue shall be documented and retained on file. Where the monitor records are stored electronically, a secure electronic signature system should be in place to demonstrate that the interviewer themselves was present during discussion/feedback and has authenticated the document. This may be via scanning the signed document, use of a unique identifier, acceptance via email or by other security measures built into the system.

> NOTE: There is no limit as to how often the documented evidence of two-way dialogue should be done. It may be via at least one monitoring report per annum being completed by the interviewer or be on a continual basis.

Where no continuous monitoring is in place, the first appraisal shall be carried out within six months of the date on which the individual was monitored / supervised on their first assignment.

6.5 Appraisal of infrequently used Telephone Interviewers and Telephone Recruiters

If an individual conducts less than five assignments in a calendar year, they shall be appraised either at least once in a calendar year or the next occasion thereafter that they work, if there is no continuous monitoring process in place.

The first appraisal shall be carried out within six months of the date on which the individual was monitored/supervised on their first assignment or on the next occasion thereafter that they work.

7 Data Validation

7.1 General

The purpose of validation is to establish that the data collection has been carried out to briefing instructions and in accordance with general training given.

All validation shall be undertaken by individuals adequately and appropriately trained for the task. The content and date of training shall be recorded and kept in the individual's file.

Validation shall be undertaken by a second person (i.e., other than the individual whose work is being validated). The aim shall be to validate/check each person's work on a regular basis.

Validation levels shall take into account the need to validate the work of recently recruited interviewers/recruiters and the work of regularly used interviewers/recruiters.

In the case of post-fieldwork validation checking the number of validation checks attempted and achieved shall be documented. Attention shall be paid to an individual's work containing a high (i.e., unusual) proportion of unsuccessful validation attempts.

The date on which the interview took place, a summary of the monitoring/validation, and the date on which it was carried out shall be kept on file for a minimum period of 12 months.

Where validation identifies discrepancies or problems the following actions shall be taken:

- Documenting the discrepancies or problems and, where appropriate, the corrective action taken;
- At project level, replacing interviews, conducting further validation / re-checking of all other work undertaken by the individual, checking the data produced;
- At the individual level, providing additional training and guidance as part of the continual appraisal process until work is deemed satisfactory.

In exceptional cases where a validation exercise is regarded as inappropriate, intrusive, impossible to undertake, or ultimately damaging to market research, the organisation may make the decision not to validate a particular project, in which case supporting reasons shall be documented and kept on file.

When the decision is taken not to validate, written confirmation/agreement shall be obtained from the client and/or a senior member of the organisation.

7.2 Visual Checking of Paper Questionnaires

A visual check on a proportion of paper questionnaires / interviewer administered questionnaires, excluding self-completion, shall be conducted. A minimum of 5 % of all paper questionnaires shall be checked (based on the total number of paper questionnaires completed in a calendar year). These checks shall be conducted before data entry, or as soon as possible afterwards. As with validation, this work shall be undertaken by appropriately trained individuals. This may include field-based supervisors.

Any significant discrepancies or actions taken as a result of visual checking shall be reported to both the individual concerned and their supervisor. Details shall be documented.

> NOTE: In the case of paper-based interviewing/recruiting via the telephone, the first interview completed by an individual on each project should be manually checked as soon as possible, to verify that questions have been asked and recorded correctly.

7.3 Validation for Field-based Interviewing

Validation can be conducted on the telephone, electronic media, face-to-face or by postal re-contact.

Validation levels shall meet the thresholds set out in **7.7**.

In the case of postal research, only returned validations will count towards validation levels.

Validation questions shall verify the following points as and when appropriate.

a) whether the interview took place;

b) date and subject matter of interview;

c) length and place of interview;

d) key demographics/filters/eligibility questions;

e) use of show cards/visual material;

f) use of identity card and 'Thank you' or 'Reassurance' leaflet or letter;

g) whether parental permission has been obtained.

In circumstances where the face-to-face interview was recorded, validation may be by listening to the recording of the interview or as described above.

If organisations choose to validate entirely by post, this shall be completed within six weeks of the date the interviews took place.

7.4 Validation for Depth Recruitment

At the interview, the participant’s identity should be confirmed.

Validation levels shall meet the thresholds set out in **7.7**.

Validation shall be conducted in one of the following ways:

a) post-recruitment validation of participant eligibility (either by telephone or face-to-face) prior to the depth interviews taking place;

b) by establishing participant eligibility at the point of arrival to conduct the depth interview;

c) post-depth interview validation (either by telephone or face-to-face or by post) within six weeks of the interview.

Validation shall establish at least the following, where relevant:

- qualification, in terms of demographics and usership (where relevant);
- method and place of recruitment.

7.5 Validation for Group Recruitment

At the group all participants' identities should be confirmed.

Validation levels shall meet the thresholds set out in **7.7**.

The organisation shall select which one of the following approaches to validation they will use. The approach used can only be changed at the start of a calendar year.

a) A minimum of two participants from each group to be validated either pre or post the group taking place.

b) By attempting to validate all participants on at least one in five of the groups the organisation conducts.

NOTE: This requires a systematic method for the selection of groups to be validated.

Validation shall be conducted in one of the following ways.

1) Pre-group validation of participant eligibility (either on the telephone, face-to-face, electronically or at the group on arrival).

2) Participants completing a self-completion questionnaire at the beginning or end of the group, returned to the organisation by the moderator (or a member of supervisory staff). Eligibility questions shall then be cross-checked with answers recorded on recruitment questionnaires.

3) Post-group validation (either by telephone or face-to-face, electronically or by post).

If a group moderator fails to return self-completion questionnaires, the organisation shall revert to post-group validation for that particular group.

Recommended good practice that: The identities of each recruiter's participants are checked against previous recruitment lists (up to twelve months old), to guard against over exposure to group discussions when contrary to specific project instructions.

Validation shall establish at least the following, where relevant:

- participant qualification in terms of demographics and usership;
- method and place of recruitment;

- whether a written invitation was received;
- time elapsed since attending previous group discussion (checked in line with instructions given to the recruiter).

Where post-group validation is conducted, this shall be completed no more than six weeks after the group(s) were held.

7.6 Validation for Telephone Centres

Validation levels shall meet the thresholds set out in **7.7**.

Data collected in a telephone centre shall be validated in one of the following ways.

- Remote listening-in of live calls
- Monitoring of recorded interviews
- Re-contacting participants

The method used to perform each monitoring/validation shall be documented on the monitoring/validation report.

A systematic, representative method shall be used for the selection and rotation of interviewers whose work is to be monitored or validated.

Monitoring/validation of data shall be carried out by adequately and appropriately trained/experienced supervisory staff.

7.6.1 Monitoring/Validating Data in Languages other than English

> NOTE 1: Where possible, all monitoring/validating of interviews/recruitment conducted in languages other than English should be conducted by a supervisor with sufficient understanding of the language to be able to discern that the work is being conducted correctly.

Validation shall cover all languages used (not necessarily on each and every project but across the various projects conducted).

Where it is not possible to use a supervisor for monitoring/validating data in languages other than English, a senior interviewer/recruiter appropriately trained and briefed shall be used.

> NOTE 2: Whilst all possible steps should be taken to ensure that monitoring/validation is carried out, allowances will be made for work involving languages other than English where reasons for non-compliance are detailed on file.

7.6.2 Validation during fieldwork using remote listening-in / recordings

Validation levels shall meet the thresholds set out in **7.7**.

Over the course of validation, all aspects of the questionnaire shall be checked, e.g.:

- routing/filter questions;
- open-ended questions;
- spontaneous and prompted questions;
- demographics/business classification.

7.6.3 Validation post fieldwork

Validation levels shall meet the thresholds set out in **7.7**.

Data collected in a telephone centre shall be validated in one of the following ways.

- On the telephone;
- Face-to-face;
- By postal re-contact;
- By listening to audio recordings of interviews.

7.7 Validation levels by methodology

Validation levels are determined by the timing of the validation in relation to fieldwork. Organisations shall achieve validation levels as outlined below, depending on whether it is carried out during fieldwork or post-fieldwork. The minimum required validation threshold is 10%, except for telephone centre validation carried out during fieldwork, which is 5%.

Data collection	**Validation**		
Method	**During fieldwork Percentage (%)**	**Post-fieldwork Percentage (%)**	**Notes**
Field-based interviewing	10 %	10 %	Postal validation should be sent out within two weeks of the interview being conducted.
Depth recruitment	10 %	10 %	In cases where ten or fewer depth recruits were achieved, at least one shall be validated.
Group recruitment	10 %	10 %	The percentage of validation applies to participants who attended groups on that project.
Telephone centres (listening-in live / recordings)	5 %	10 %	At least 75 % of the total length of any interview/recruitment call shall be listened to.
Telephone centres (re-contact)	10 %	10 %	Validation shall determine as a minimum the following: (a) whether the interview took place; (b) the date and subject matter of the interview; (c) the duration of the interview; and (d) key demographics, screener data, and eligibility questions.

NOTE: The organisation shall ensure that validation is carried out as soon as practical after the completion of the interview. Validation thresholds shall be met during fieldwork, where possible, and no more than six weeks after fieldwork completion in any circumstances. Wherever possible, this should be before the data collected are processed and/or delivered to the client.

8 Mystery Shopping, Auditing and Observational Research

NOTE 1. For requirements relating to supervisors of mystery shopping and observational research see **3.2.**

A "helpline" shall be provided so that all mystery shoppers, auditors and observers can contact head office or supervisory personnel for guidance or advice either prior to, or subsequent to, any work done. Contact may be by telephone or email.

NOTE 2. Mystery shoppers/observers are not expected to carry an identity card as the purpose of the exercise is that the evaluation takes place surreptitiously. In some instances, a Letter of Authority may be provided for mystery shoppers / observers / auditors. Issue of identity cards for auditors is at the discretion of the organisation.

8.1 Head Office Administration

The following records for each individual shall be available:

a) application form;

b) proof of evidence to work in the UK;

c) terms and conditions;

d) details of training / information provided;

e) projects worked;

f) unique identifier (i.e., number or name);

g) deficiencies found and action taken.

h) performance feedback (**see 8.4**)

i) (for auditors only) a report of accompaniment on first assignment

Information relating to individuals who are no longer used shall be available for a minimum of 12 months starting from their last day of work.

8.2 Training and Briefing

Requirements for the training of Mystery Shopping Assessors, Observers and Auditors shall meet the requirements outlined in **Section 5.2** and cover the content set out in **Table 4**.

Table 4 – Minimum information / training provided to Mystery Shopping Assessors / Observers / Auditors **All training materials must be available for inspection.**		**Worked for IQCS/ISO 20252 accredited company in the last 12 months.**	
	If new to market research	**Not conducting the intended type/s of work**	**Conducting the intended type/s of work**
Introduction to the organisation, personnel and administration	Yes	Yes	Yes
The purpose and value of market research	Yes	—	—
The importance of accurate and ethical data collection	Yes	Yes	—
The MRS Code of Conduct and MRS Guidelines for Conducting Mystery Shopping	Yes	Yes	Yes
Appropriate elements under the Data Protection Act 2018	Yes	Yes	Yes
Role of the supervisory team and head office	Yes	Yes	Yes
Monitoring system for progress of work	Yes	Yes	Yes
What to do when problems arise	Yes	Yes	Yes
Appraisal method and frequency	Yes	Yes	Yes
Quality control procedures / spot checks, where applicable	Yes	Yes	Yes
Assessor / Observer / Auditor courtesy / manner	Yes	—	—
Questionnaire completion and administration	Yes	Yes	Yes
The organisation's communication requirements	Yes	Yes	Yes
Full knowledge of the way in which the company monitors progress of an individual's work	Yes	Yes	Yes
Appropriate elements of the health and safety guidelines	Yes	Yes	Yes
Some practical experience of assessing / observing	Yes	—	—
Knowledge of what can and cannot be recorded or observed further to confidentiality obligations			
Before individuals commence work, they must be assessed to ensure they have understood and assimilated the information covered during training. This may form part of the training programme itself and shall be documented.			

8.2.1 Mystery Shoppers / Observers Training / Briefing

In addition to the minimum requirements at Section 8, all individuals shall be adequately and appropriately trained and/or briefed on each project to ensure work is conducted in a consistent manner.

> NOTE 1. It is appreciated that for some types of this work, over-training can focus a mystery shopper to the point where they behave as a professional assessor rather than a typical client. Therefore, it is acceptable for training to be task driven, and related to each project.

The method of training/briefing shall be agreed between the organisation and the client for each project and documented by one party. This document shall be kept on file and available for inspection. Every individual shall be issued with briefing information relating to the project, which describes in detail:

a) what they are expected to do;

b) how to enact the scenario (who they are and what they have to do);

c) how to complete the report form/questionnaire.

Briefing information shall always contain full and adequate project instructions which may take the form of, or combine:

- written instructions;
- online guidelines;
- training materials (see **1.8**)

Where appropriate, this may be supported, but not substituted, by a telephone, video-based or in-person briefing. Briefing material shall be kept and be available on file.

8.2.2 Auditors Training / Briefing

Training shall be given by a supervisor or member of the organisation's staff, who is adequately and appropriately trained and experienced to conduct the training.

The organisation shall ensure that all auditors are adequately and appropriately trained and experienced to carry out the various types of work they undertake.

The training of auditors is achieved through on-the-job skills transfer between the trainer and the auditor.

The training of auditors shall be for a minimum period of 6 hours, plus as much additional time as is necessary to leave the individual competent to work alone.

Details of the training given by the organisation shall be kept on file.

8.3 Declaration

Assessors / Observers / Auditors shall acknowledge receipt of a declaration that includes the following or is similar to:

"I declare that this survey has been carried out in accordance with my briefing instructions."

Organisations shall select at least one of the following ways for individuals to sign the declaration:

a) a signed declaration on evaluations/questionnaires (including electronic signatories);

b) a signed declaration on pay claims/time sheets;

c) on a separate sheet signed at the end of each assignment/day;

d) on a separate sheet which is signed once a year and kept in the individual's file;

e) via acceptance on an online declaration.

If (d) is the chosen method, a more appropriate declaration would be "I declare the work I conduct will be carried out in accordance with my briefing instructions."

8.4 Performance Feedback and Action

If problems or deficiencies are found in an individual's work, appropriate feedback shall be given as soon as it is known and, if possible, before the individual's work is used or before the individual is used again**,** as deemed appropriate. The problems and deficiencies found, together with the action taken, shall be documented.

Individuals who work on five or more projects or waves in a calendar year shall be given feedback on the quality of their work at least once per year and a record of this kept on file.

> NOTE: Feedback on performance may be given face-to-face, by telephone or in writing.

8.5 Validation of Mystery Shopping/Observational Data

When work is conducted by telephone, validation requirements shall be completed as per **Section 7.6**.

In all other cases validation shall be conducted in at least one of the following ways:

a) a computer search on 100% of the work for data appearing outside the ranges of normal; and/or

b) manual logic checks on 100% of the work for data appearing outside the ranges of normal.

Validation should be conducted by appropriately trained people.

Wherever possible, validation should be conducted before the work is used.

If mystery shoppers telephone in or electronically submit results to a central location, and the data is edited at that time, a general statement to this effect should be recorded.

Validation may also include checking associated records, e.g., receipts from purchase / services used.

Where the mystery shopping or observational research needs additional risk controls to be implemented and this means the use of personal protective equipment, spots checks shall be implemented.

9 Glossary of Terms

appraisal

A regular review of performance, and agreement on development needs and plans, with input and discussion from both appraiser and appraisee.

assessor

The assessor is the person who conducts the ISO 20252 inspection.

auditor

In data collection, an individual who on behalf of the organisation collects sales data

> NOTE: The term auditor is a specific term used in market research and is unrelated to auditing within business in general or assessment auditing.

CAPI

Data capture by means of Computer Assisted Personal Interviewing.

CATI

Data capture by means of Computer Assisted Telephone Interviewing.

CAWI

Data capture by means of Computer Assisted Web Interviewing.

client

Individual, organisation, department or division, internal or external, which requests or commissions a research project.

code frames

The result of grouping closely similar responses used in coding open-ended questions, created through looking at a proportion of the responses in detail.

coding

The allocation of codes to groups of closely similar responses recorded against open-ended questions, in order to analyse that information together with the rest of the data.

confidentiality

Requirement that data collected or information and materials are protected from unauthorized access.

data collection

A general term covering the collection of information such as:

- face-to-face interviewing in home, in the street, in a central venue, at place of work;
- group discussions, depth interviews;
- telephone interviewing from a telephone centre;
- telephone interviewing from interviewers' homes;
- auditors collecting in store information;
- evaluators conducting mystery shopping and client service work;
- participants completing self completion/postal questionnaires;
- through electronic techniques, including online/web assisted, PDA.

data entry

The input of questionnaire information into electronic format ready for survey analysis.

data record

Data relating to the completed questionnaire of an individual participant, item/transaction (i.e., reportable unit).

depth interview

Unstructured interview conducted by a specially skilled interviewer

discussion guide

List of points or subjects which have to be covered in a depth interview or focus group

editing

A comparison of actual responses with possible responses, as defined by questionnaire structure and logic and then, if necessary, rejecting or amending some responses.

field-based

Interviewers or recruiters conducting data collection outside the organisation's offices (excluding remote/distributed/home-based telephone interviewers).

group discussion

Informal discussion with a small number of selected participants conducted by a skilled moderator.

group moderator

An individual who is responsible for facilitating the interaction of the group discussion members, and for capturing the data generated.

group recruiter

An individual who on behalf of the organization recruits participants for market research interviews group discussions.

> NOTE: Those who conduct depth and group recruitment are treated as recruiters if they do no other type of work.

hall test

Research conducted at a central venue (e.g., car clinic, product testing, advert testing).

incentive

Gift, payment or other concessions offered to potential participants to encourage participation.

inspector

Is the person who conducts the IQCS inspection.

interactive

Interactive is defined as a dialogue or process with two-way interaction, which can be phone, video-conference or face-to-face.

interviewer

An individual who on behalf of the organisation interviews participants face-to-face or by telephone.

logic data entry

Data entry processes which are programmed for specific projects to check question skips and response range checks.

> NOTE: Automatic serial numbering alone does not constitute logic data entry.

MRS Freephone Verification Service

An independent service provided to the public to verify the legitimacy of UK market research agency members.

mystery shopping

Client service evaluation process involving individuals who on behalf of the organisation collect information by behaving as customers and report their findings as a way of monitoring the quality of performance.

observational research

Research study where data is collected by directly or indirectly observing behaviour or events taking place.

open-ended question

Type of question where participants are asked to answer in their own words.

panel

A group of selected participants who have agreed to provide information at specified intervals over an extended period of time.

PAPI

Data capture by means of personally administered paper interviewing.

participant

Person from whom data is collected for market research purposes

qualitative research

Analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour via unstructured research techniques such as focus groups and depth interviews.

quantitative research

Numerical representation of observations for the purpose of describing and explaining the phenomena that those observations reflect.

questionnaire

Structured tool for collecting data consisting of a series of questions.

remote listening-in

In data collection, a method of validating the authenticity of responses and quality of interviewing in the telephone centre by the manager or supervisor listening to both sides of an interviewer's calls

NOTE: This may be by using monitoring equipment or voice recording media.

recording

Recordings include audio and video recordings of market research activities.

sample

Subset of the target population from which the data is to be collected.

screening

Initial questions in a questionnaire used to establish eligibility of participant.

specialist interviews

Specifically related to specialist (i.e., non-consumer) participants.

sub-contracting

Outsourcing an element of the research project to a third-party organisation or individual.

supervisor

An individual who on behalf of the organization undertakes at least one of the following tasks relating to data collection:

- selecting and interview new recruits;
- training;
- monitoring/appraisals/accompaniments/validation;
- allocating work, progress chasing and/or project and quota control.

  NOTE: An individual employed full or part-time as an office-based member of staff is not deemed to be a supervisor unless they spend the vast majority of their time undertaking supervisory tasks as defined above.

survey

Systematic data collection from a sample of a target population, to which inference can be made

telephone centre

A central location with a number of telephone or CATI stations used for market research recruitment/interviewing.

validation

Procedures to check that data has been collected according to specification.

verification

Procedures to check that data are processed according to specification.

viewing facility

Venues specifically arranged to accommodate group discussions.

wave

Each successive repetition in a continuous project