RECOMMENDED BEST BUSINESS PRACTICES FOR OPINION AND MARKETING RESEARCH

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MRA[SM]
Marketing Research Association

RECOMMENDED
BEST BUSINESS PRACTICES

FOR OPINION AND MARKETING RESEARCH

MRA presents these recommended best business practices for opinion and marketing researchers; that is, ideals to guide them in providing professional, ethical and reliable products and services. In addition to supplementing our Code of Data Collection Standards, these recommendations are part of our mission to:

1. Promote excellence in opinion and marketing research;

2. Create value by providing members with a variety of opportunities for advancing and expanding their opinion and marketing research and related business skills;

3. Enhance the opinion and marketing research environment as an advocate with appropriate business and government entities, other associations and the public.

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I. IDEALS FOR INTERACTING WITH RESPONDENTS

Respect for Time
Each respondent's time should be respected. Lengthy interviews are a burden to the respondent.

- Research organizations are responsible for weighing the need for information against the length of the interview.
- In-person and telephone interviewing should be conducted between the hours of 9 a.m. and 9 p.m., except by appointment.
- Respondents should not be misled regarding length of interview.
- Interviewers should have an efficient and professional style.

Right to Privacy
All reasonable precautions shall be taken to ensure that the respondent and others closely associated with the respondent are in no way adversely affected or embarrassed as a direct result of any interview, including subject matter, technique or communication concerning the research project.

- Respondents should be advised when a follow-up validation call may occur.
- When state and/or federal regulations require, respondents should be notified that interviews may be monitored for quality purposes.

II. IDEALS FOR WORKING WITH CLIENTS

Data Security
All reasonable care must be taken by research providers and interviewers to keep questionnaires, products and data files secure.

- Nondisclosure statements should be obtained from all employees.
- Study materials should be returned to the client within a reasonable time frame or as requested by the client.
- Study material should not be destroyed without client authorization.
- Products should be disposed of according to the client's instructions.

Clear Communication
All reasonable care must be taken to use effective communication, including advising clients regarding appropriate interviewing techniques and methodologies.

- Follow MRA Communication Guidelines by:
  - Providing study bids in writing;

- Sending written confirmation of study specs including payment and cancellation processes ;
- Informing the client immediately of any inability to complete study requirements due to unforeseen circumstances;
- Providing established payment procedures and terms as part of a proposal or cost estimate, either verbally or in writing;
- Not scheduling more work than you can handle;
- Communicating company business policies to clients up front;
- Agreeing upon acceptable reporting procedures in advance.

- Advise clients that your company abides by the MRA Code of Data Collection Standards and Recommended Best Business Practices and provide copies of these documents to clients for reference.

- Obtain release statements from respondents if they are to be recorded (audio or video) for monitoring purposes.

III. IDEALS FOR WORKING WITH DATA COLLECTORS

Professionalism
All reasonable care must be taken to promote principles of respect, trust and effective communication.

- Provide concise, clear, written instructions.

- Furnish honest information regarding study specifications and requirements.

- Supply responsible and realistic costing and timing.

- Notify the data collection company of changes in study specifications as they occur.

- Abide by contracts.

- Notify the data collection company as early as possible of a cancellation or postponement.

IV. IDEALS FOR COMMUNICATING WITH THE PUBLIC AND BUSINESS COMMUNITY

Public Relations
Provide communities with positive information regarding the benefits they will derive from providing their opinions, encourage participation, and work to find ways to increase respondent satisfaction with the research process.

- When using facilities for non-research purposes, use a distinctly different company name from that of the research/data collection company.

- Provide employees with continuing education and training to maintain high quality standards and to ensure compliance with the MRA Code of Data Collection Standards.

- When provided, compensation to respondents should be adequate.

- Do not participate in activities harmful to the opinion and marketing research industry.

Image Projection and Protection
Interviewers are the industry's ambassadors to the public and, as such, should:

- Exhibit professionalism by being pleasant and courteous;

- Show pride in themselves and their work through their appearance, manner, conduct and delivery of the interview process;

- Provide honest information to respondents upon request, e.g., interview length;

- Introduce themselves and give their company name prior to the start of the interview;

- Provide a leaflet, card or letter with the name of the interviewer's company to respondents so that they may verify that the interview is legitimate.

V. ADDITIONS

In addition to the Ideals listed in this document, the following recommendations for qualitative research are approved and endorsed by the Marketing Research Association and Qualitative Research Consultants Association.

Respondent Cooperation & Privacy
To protect the trust which the public associates with our opinion and marketing research industry, during and after the research, we recommend:

- It is the responsibility of the facility to remove respondents' identifying information from the screener before usage by any other person.

- Respondents be informed in advance of any audio or videotaping or observing to be done of them. Respondents must give their permission to do so in written form.
  - Children (under the age of 12) cannot be videotaped or recorded in any manner without their guardian's written permission. Prior to interviewing, a guardian must read and sign a written consent form.
  - Audio or video recordings must be handled in a responsible manner to protect respondents' identities.

- Clients and others involved in the research process (observers included) should not disclose the respondents' identities.

- Respondents who are recruited from a facility database are the property of, and will be protected by the facility.

- Procedures below must be followed before recontacting respondents of a research project. These procedures should be shared with the client and others involved in the research process before the project begins.

- Respondents should be made aware of the possibility of them being re-contacted during recruitment.

- The recruiter should explain the purpose of the re-contact to the respondent.

- A written or oral agreement to be re-contacted should be obtained from the respondent by the recruiter.

- If respondents are from a facility database - prior to the project, the moderator or recruiter must obtain written permission by the owner of the database for re-contact.

These procedures are best done during the initial recruiting and should not be done after recruitment.

Facility Owners/Managers Responsibilities

- Client-supplied lists of respondents are the property of the client (not the facility).

- Databases of respondents from third parties should not be recontacted by the facility conducting the project.

- Directions by the client for return or disposal of lists should be honored.

- Written permission should be obtained from a client if lists are to be used for other projects or for recruitment databases.

- If requested by the respondent, the respondent's name can be added to the facility database from a client's list.

- Facilities can post a notice in a general area that they recruit respondents for other projects. Notices are not acceptable in any other area or in correspondence with respondents without the client's permission.

Respondent Identification Procedure

*To protect the credibility of the qualitative research industry and show the professionalism of the research process the following procedures are recommended to diminish the participation of "Cheaters" and "Repeaters."**

- Before Recruitment:
  - The client should be informed of the procedure to require respondents to provide photo identification prior to the recruitment.

- Recruiting of Respondents:

  Facilities/recruiters should state to the respondent when inviting them to the project that they need to provide photo identification.
  - Add this information to the content of the respondent confirmation letter.
  - Add this statement to the reminder call and/or the respondent rescreening procedure.

- Time of Interviewing:
  - Respondent must be required to produce proper photo identification of his or her person before the qualitative research project begins. *Note: This pertains to Face to Face research.*
  - Display a placard at the reception area for respondents, in clear view, stating "Please Be Prepared to Show a Photo ID". *Note: This can be made available to all MRA members. Contact MRA Headquarters at 860-257-4008.*
  - Client/moderator should be informed of the procedure outlined here and be in agreement that it be used for their project.

- If the respondent arrives without proper identification:
  - Determine if there is a suitable alternative form of identification.
  - The facility must use its' best judgement and confer with the client before termination of the respondent.
  - If the identity of the respondent cannot be verified the facility should alert the client.

Always treat the respondent with fairness and sensitivity, but without compromising the research process and validity of the study.

**Footnote:*
"Cheaters" - a respondent who does not qualify to be a respondent for a specific qualitative research project because either:
- *Respondent "knowingly" falsifies information and/or*
- *Conspires during recruitment to "qualify" for a project by offering false answers regarding;*
  - *Identity*
  - *Demographics*
  - *Usage*
  - *Other criteria relevant to the research project*

"Repeater"- a respondent who is recruited or is intentionally allowing himself to be recruited more often than opinion and marketing research industry norms.
- *Does not accurately report past respondent activity*
- *Uses another identity to qualify*